

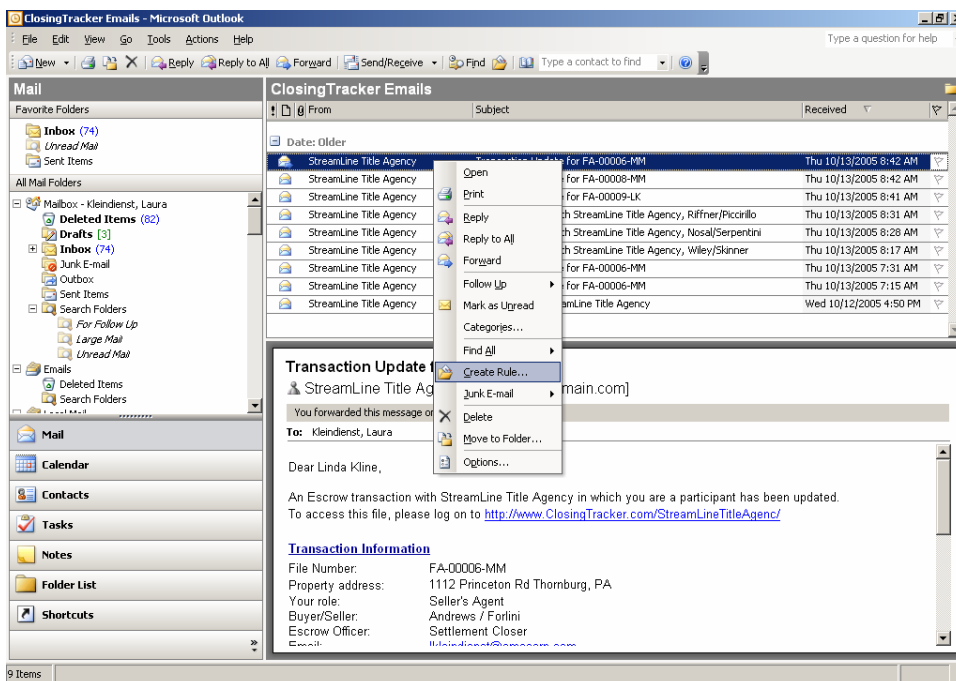
## Route Emails in Outlook\*

\*These instructions are based on Outlook 2003. If you are using a different version of Outlook or Outlook Express, instructions may be different. Additional help is available through Outlook online help.

In this example, we will use an existing email sent by a ClosingTracker system to create a rule to forward a copy of all emails from ClosingTracker to a cell phone that accepts text messages. When the email arrives in the inbox, it will automatically be routed to the email address at the recipient's mobile phone.

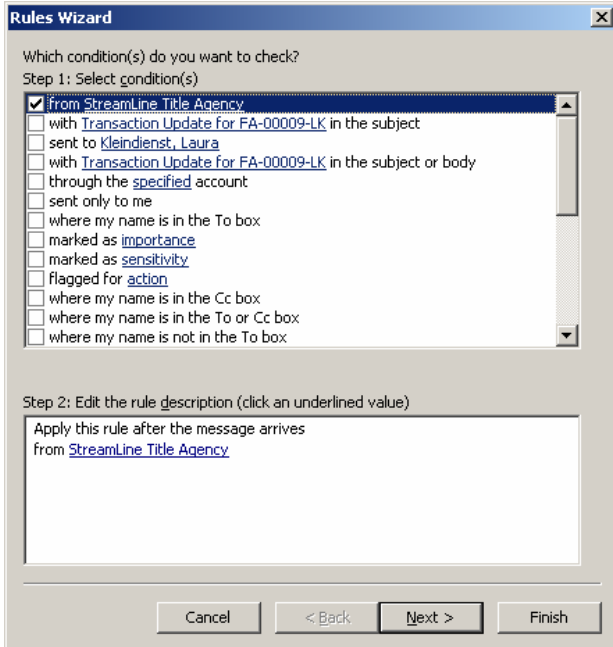
### Tips:

- Verify with your ClosingTracker end-user that they can receive text messages.
- Forward a sample email to verify that they can view all the text sent – some providers limit the amount of text that will be displayed.
- An example of a email address to send text messages to a mobile phone is: [7145551212@vtext.com](mailto:7145551212@vtext.com) (this is for Verizon)



1. Go to your inbox and locate any message sent by your company's ClosingTracker system. Tip: Your company name should display as the sender.
2. **Right-click** the message you want to base a rule on.
3. Click **Create Rule** – the Create Rule screen will display.

4. Select **Advanced Options...**
5. The **Rules Wizard** screen will display.



**Rules Wizard**

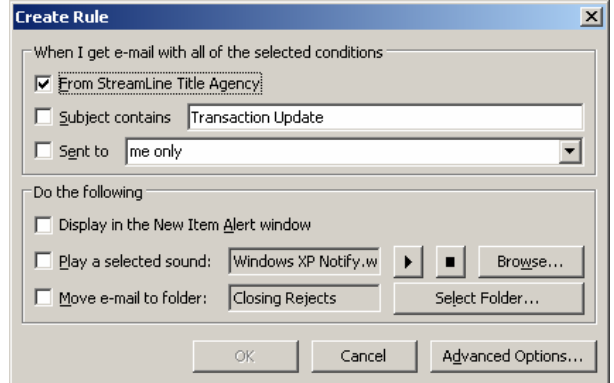
Which condition(s) do you want to check?  
Step 1: Select condition(s)

- from StreamLine Title Agency
- with Transaction Update for FA-00009-LK in the subject
- sent to Kleindienst, Laura
- with Transaction Update for FA-00009-LK in the subject or body
- through the specified account
- sent only to me
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives from StreamLine Title Agency

Cancel < Back Next > Finish



**Create Rule**

When I get e-mail with all of the selected conditions

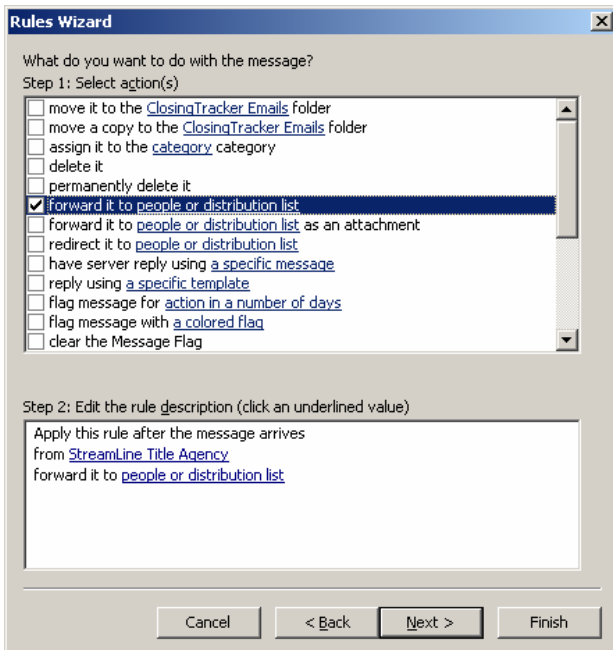
- From StreamLine Title Agency
- Subject contains Transaction Update
- Sent to me only

Do the following

- Display in the New Item Alert window
- Play a selected sound: Windows XP Notify.w Browse...
- Move e-mail to folder: Closing Rejects Select Folder...

OK Cancel Advanced Options...

6. Mark the check box that the rule will be based on (e.g. Sender's Name).  
In this example, any email that comes from ClosingTracker sender "StreamLine Title Agency".
7. Click **Next**
8. Mark the check box for: **forward it to people or distribution list**.
9. Edit the information by clicking the **people or distribution list** link in Step 2.
10. The Rule Address screen will display.



**Rules Wizard**

What do you want to do with the message?  
Step 1: Select action(s)

- move it to the ClosingTracker Emails folder
- move a copy to the ClosingTracker Emails folder
- assign it to the category category
- delete it
- permanently delete it
- forward it to people or distribution list
- forward it to people or distribution list as an attachment
- redirect it to people or distribution list
- have server reply using a specific message
- reply using a specific template
- flag message for action in a number of days
- flag message with a colored flag
- clear the Message Flag

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives from StreamLine Title Agency  
forward it to people or distribution list

Cancel < Back Next > Finish



**Rule Address**

Type Name or Select from List:  Show Names from the: Exchange Personal Contacts

Name	Display Name
Accounts Payable	ap@smscorp.co
AEA / Shelley	memberservice-
Ahand@Firstam.Com	ahand@firstam
Albertson Tami x2181	talbertson@sms
Ali Azimi	aazimi@pdsrep
All SMS Employees	sms_users@firs
Amanda Saffold	asaffold@firsta
American Pioneer / Wayne Cochran	wcochran@apti
Andre Vitti	avitti@smscorp
Andy Bryner	andyb@subc.co
Andy Hand	ahand@smscorp
Andy L. Meyers	ameyers@stew
Anne Paine	APaine@HORIZ
AOS Brenda Grabowski	brendag@aosin
Berkv Carnter	hercarnter@fi

Specify whom to forward messages to:

To ->

Advanced

11. Enter the email address in the **To ->** field.

12. Click **OK**

13. Click **Next**

14. Select any exceptions, if applicable.  
An example might be **except if it has any attachments**.

15. Click **Next**

**Rules Wizard**

Are there any exceptions?

Step 1: Select exception(s) (if necessary)

- except if from people or distribution list
- except if the subject contains specific words
- except through the specified account
- except if sent only to me
- except where my name is in the To box
- except if it is marked as importance
- except if it is marked as sensitivity
- except if it is flagged for action
- except where my name is in the Cc box
- except if my name is in the To or Cc box
- except where my name is not in the To box
- except if sent to people or distribution list
- except if the body contains specific words

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives  
from StreamLine Title Agency  
forward it to 7142229273@vtext.com

16. Enter the name of the rule.

17. Select **Turn on this rule**.

18. Click **Finish**.

**Rules Wizard**

Finish rule setup.

Step 1: Specify a name for this rule

Step 2: Setup rule options

- Run this rule now on messages already in "ClosingTracker Emails"
- Turn on this rule
- Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives  
from StreamLine Title Agency  
forward it to 7142229273@vtext.com

**To Turn a Rule Off:**

1. Go to Tools Menu and select Rules and Alerts.
2. Uncheck the box next to the rule you would like to turn off.
3. Click **OK**.

