



CASEHOMEPAGE

Managing Your Documents Is Our Only Business

Microsoft® Office Outlook®

If you use a web-based email service that allows for POP3 or IMAP access, you can contact your email service provider to find out if your email can be used with Microsoft® Office Outlook®.

1. Open Microsoft® Office Outlook® and enter your login credentials

To Create a Folder:

2. In the navigation pane on the left-side of the screen, right-click on “Inbox” (or, the location in which you want to create the folder)
3. Select “New Folder” from the menu
4. Enter a name for the folder you are creating and click “OK”

To Create a Rule:

5. Find a message from the CaseHomePage “Administrator”
6. Select the message and right-click on it
7. Select “Create Rule”
8. Check the box next to “From Administrator”
9. **If you want email from CaseHomePage to be placed in different locations by case,** check the box next to “Subject Contains”. In the field to the right, remove all text after the name of the case so it reads “New Document Added to Your Case Name Here”. You will need to create a rule for each case. (If you want all email from CaseHomePage to go to a single location, skip this step.)
10. Check the box next to “Move the item to folder”
11. Click the “Select folder” button
12. Select the folder you want the emails to route to and click “OK”
13. Click “OK”

Microsoft® Office Outlook® may take a minute to update the server. Be patient and allow the rule to run. Designated emails from **CaseHomePage** will now route to the appropriate folder(s) automatically.