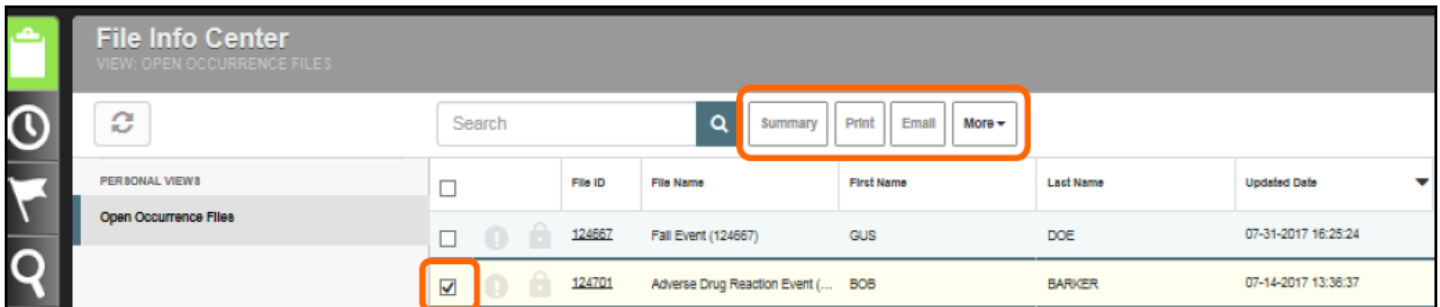


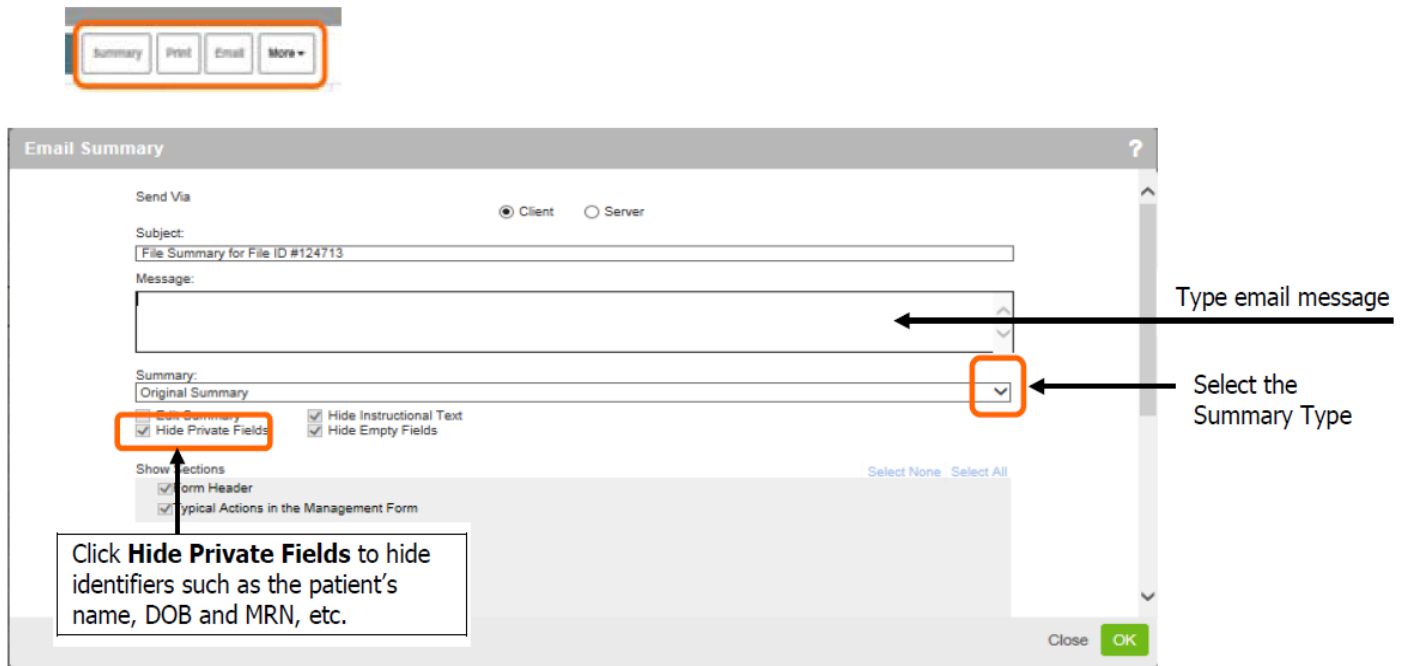
Emailing Summary Report

There are two ways to email summaries. The first is directly from the File Info Center using these steps:

1. Once in *File Info Center*, select the check box beside the *File ID* of the file summary you want to email. Once you select the check box beside the File ID the summary option buttons appear (*Summary, Print, Email, More*).



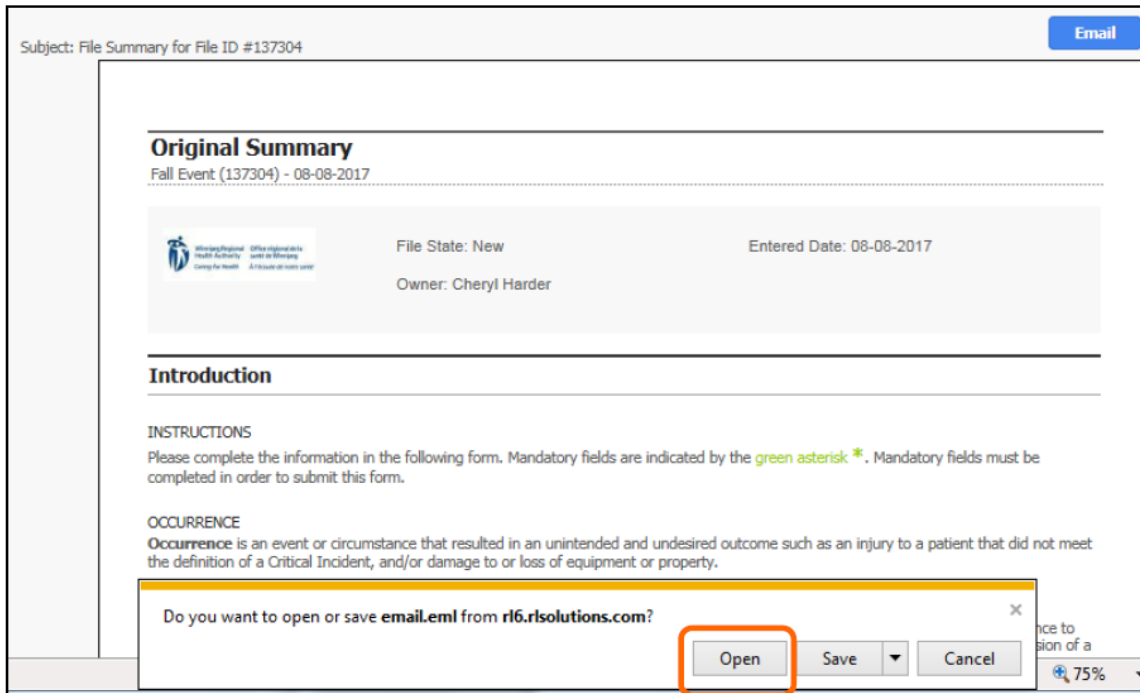
2. Click the **Email** button on the File Info Center window and select the type of summary to email (Original, Current or Follow-up)



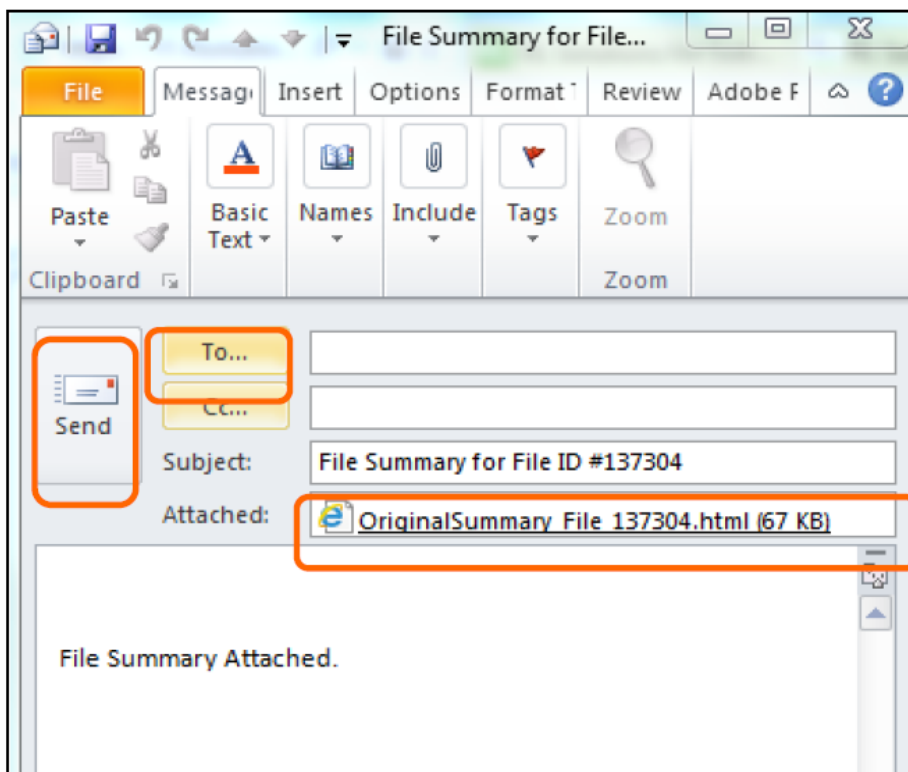
You can hide sensitive fields or modify the summary in all but the Original Summary.

3. Select **OK** at the bottom right hand corner.

The summary window opens:



4. Select **Open** from the “Do you want to open or save email.eml from rl6.rlsolutions.com” dialog box. Outlook opens with the summary attached:



5. Type the email address in the **To** text box or click the **To** link to select the email address. Click the **Send** button.

An alternative way to email summaries:

- 1. Ensure you are in the file you want to email the summary from.
- 2. In the **File Notifications** section, select **Summaries** then select **Email Custom Summary**.

File Notifications

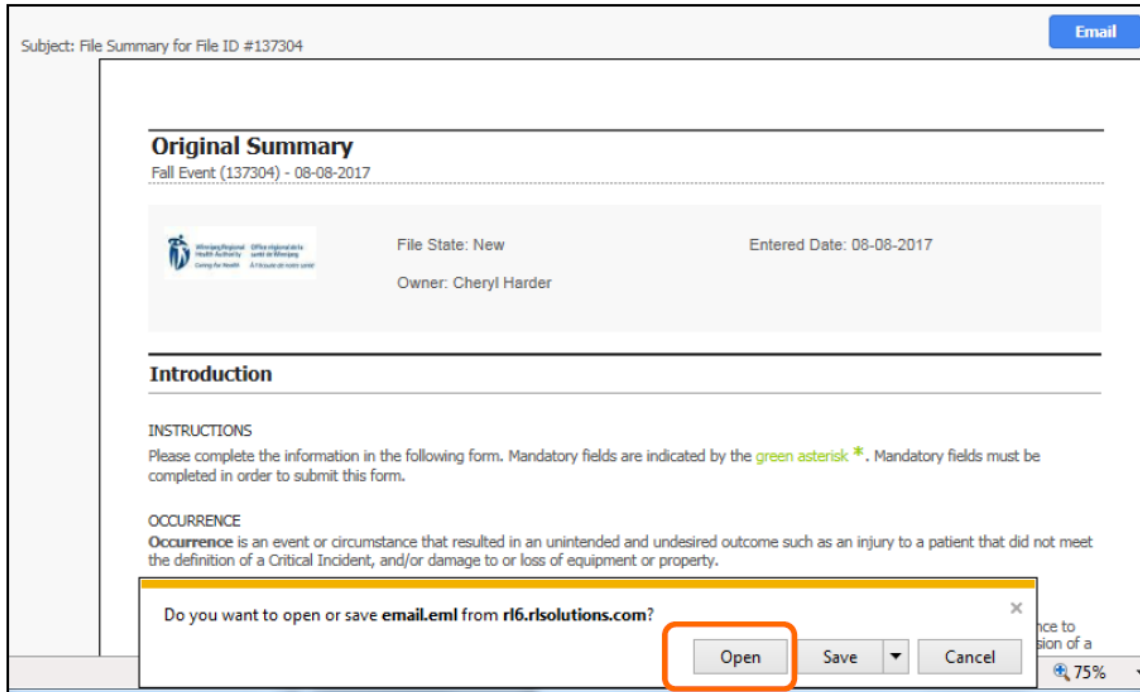
The screenshot shows a sidebar menu with the following items: Linked Files (0), Alerts (0), Tasks (0), **Summaries**, Audits, and File Exports. The 'Summaries' item is highlighted with an orange box. A dropdown menu is open to its right, listing: Original Summary, Current Summary, Followup Summary, Task Summary, Print Custom Summary, **Email Custom Summary** (highlighted with an orange box), and Download Custom Summary.

The Email dialog box opens.

The screenshot shows an 'Email' dialog box with the following fields and options: 'Send Via' (Client selected), 'Subject' (File Summary for File ID #137304), 'Message' (empty text area with an arrow pointing to it from the text 'Type email message'), 'Summary' (Original Summary selected), checkboxes for 'Edit Summary', 'Hide Private Fields', 'Hide Instructional Text', and 'Hide Empty Fields', and a 'Show Sections' list with various items checked. 'Close' and 'OK' buttons are at the bottom right.

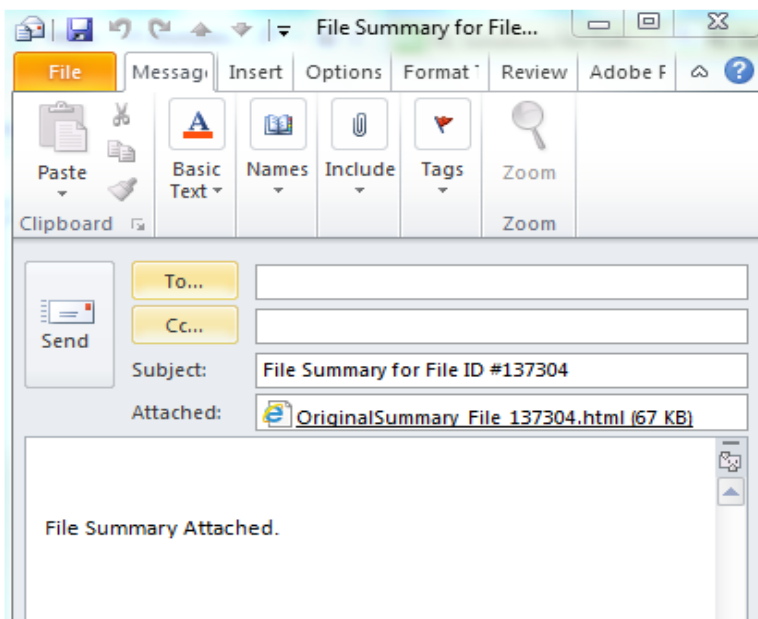
- 3. Select the type of summary to email from the *Summary* drop-down list.
- 4. Select **OK**.

The summary window opens.



- 5. Select **Open** from the “Do you want to open or save email.eml from rl6.rlsolutions.com?” dialog box.

Outlook opens with the summary attached.





6. Type the email address in the **To** text box or click the **To** link to select the email address. Click the **Send** button.

The email and a HTML summary will be sent to the recipient.