emailbudAI Quick Guide

Page 1 of 2 · Set up, read and act

SET UP · READ · ACT

Set up once, in five steps

About 10 minutes, then it works in the background.

1 Install

Run **emailbudAI-Setup.exe**. It checks your PC and suggests the right AI model.

2 Connect your mail

More › Mail account… Classic or new Outlook, Microsoft 365, Gmail or IMAP.

3 Tell it about you

Settings › About you: your name and role, so summaries say “me” and tasks are yours.

4 Add your projects

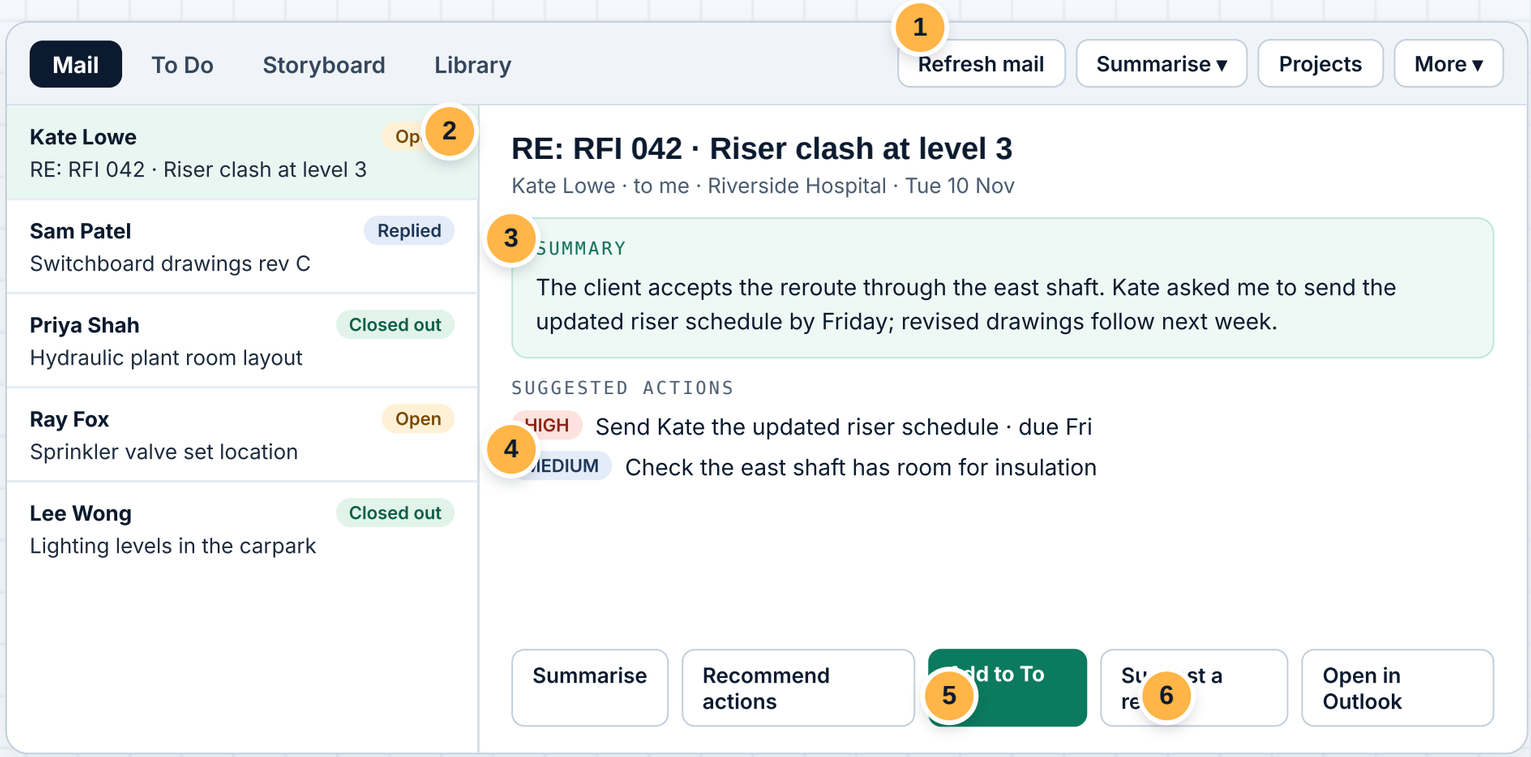
Projects: names, job numbers and the key people's email addresses for each.

5 Add it to Outlook

More › Outlook add-in… puts the emailbudAI pane beside your email.

Mail: read less, miss nothing

Every email summarised and checked for tasks.



1. **Refresh mail** fetches new email and summarises each one. The Scheduler (More) can do it for you.
2. **Status at a glance:** Open, Replied or Closed out.
3. **Summary:** newest point first, written as “me”. Disclaimers and signatures left out.
4. **Suggested actions:** tasks and deadlines found in the email.
5. **Add to To Do:** check and change tasks first. Change them later here too: the task follows.
6. **Suggest a reply** in your tone, then open it in Outlook to send.

To Do: every task, by project

Riverside Hospital

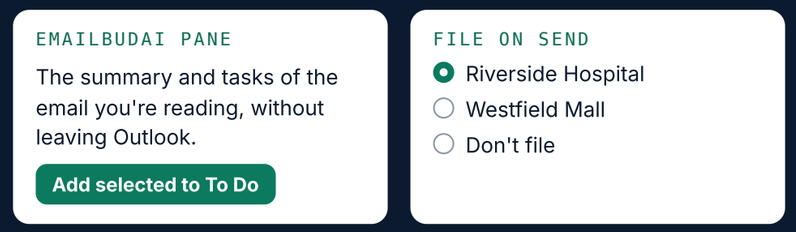
- ☐ Send Kate the updated riser schedule — Fri ★
- ☐ Check east shaft space for insulation — Next wk

Westfield Mall

- ☑ ~~Confirm carpark lux levels~~

Tasks are grouped under their project, with due dates and stars. Link a list to **Microsoft To Do** or **Outlook Tasks** to see them on your phone too.

In Outlook

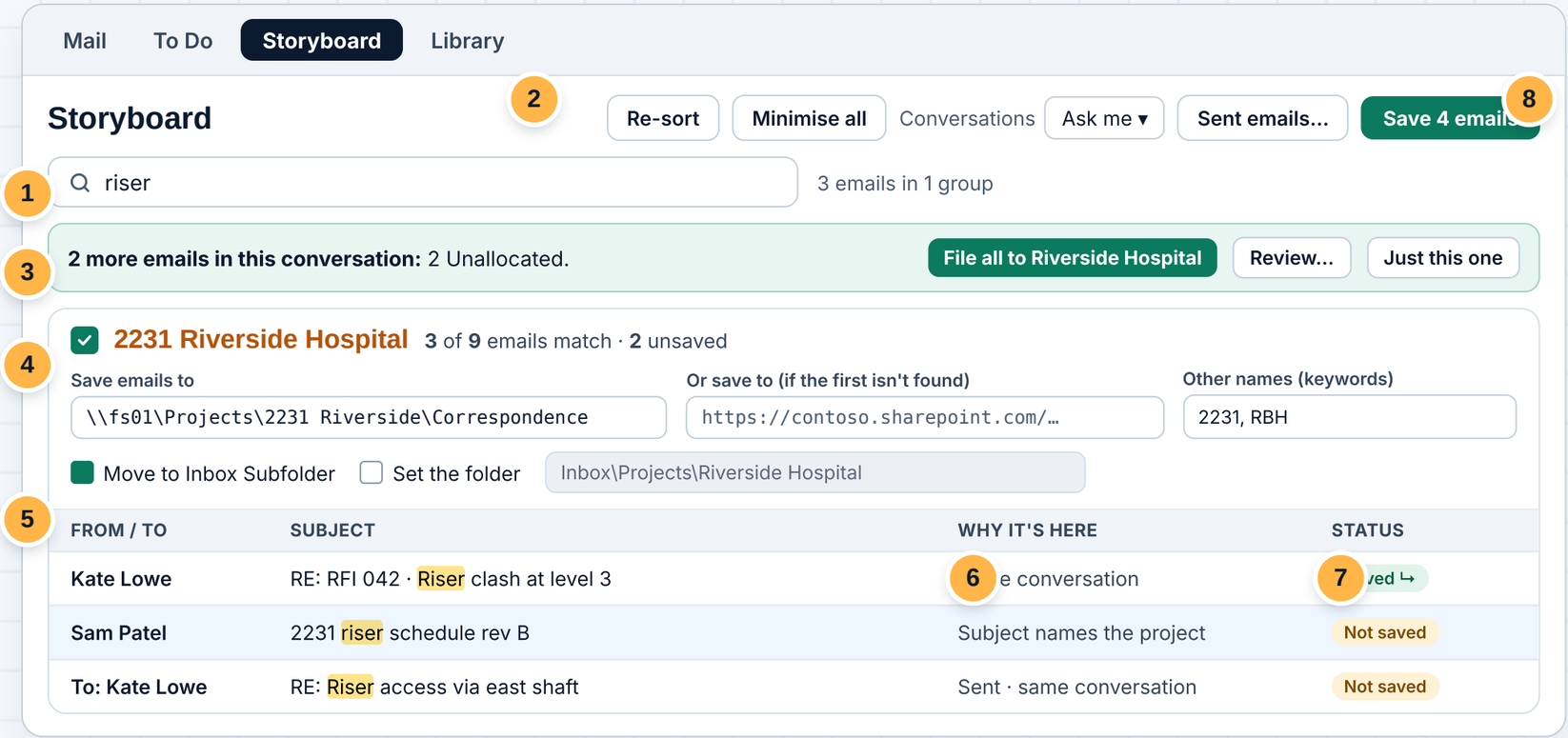


The pane works in classic and new Outlook. In the new Outlook, **File on Send** asks which project as you send, and skips the question when the answer is obvious. Turn it on in **Storyboard › Sent emails…**

Private by design: the AI runs on your PC. Your email isn't sent to an online AI unless you choose one.

Storyboard: every email sorted to its project

Check it, fix it with a drag, save it in one click.



1. **Find:** type words to show only matching emails. `Ctrl+F` jumps here, `Esc` clears.
2. **Re-sort** against your projects (your own moves are kept). **Minimise all** folds every group.
3. **File the whole conversation:** file one email and the rest are offered. New replies follow.
4. **Tick the projects to save.** Set the folder (network or SharePoint link), a second one if the first isn't found, and keywords.
5. **Move to Inbox Subfolder:** saved emails leave the Inbox. Tick **Set the folder** to choose where.
6. **Why it's here:** the rule that placed each email.
7. **Status:** Saved, Not saved or Folder not found. Click Saved to see the file.
8. **Save Emails** files every unsaved email in the ticked projects.

WRONG PROJECT? MOVE IT

Click to select, `Ctrl`+click to add, `Shift`+click for a range, `Ctrl+A` for all. Then **drag** onto a project, or use its move menu.

How an email is placed

The first rule that fits wins:

1. The **subject** names a project or a keyword
2. It's in a **conversation** already filed
3. The **email text** names one project
4. The **sender** is one of the project's people
5. Otherwise the **AI** reads it, or it waits in **Unallocated**

Emails you move by hand stay where you put them.

Save Emails does three things

1. **Saves** each email as the original file, attachments and all, named by date and subject, in the project's folder.
2. **Marks** it in Outlook with the green category Saved with emailbudAI.
3. **Moves** it out of the Inbox to the project's folder, if Move to Inbox Subfolder is ticked.

A colleague already filed it? It isn't saved twice. Moved a saved email to another project? Its old file comes out of the old folder (kept 30 days).

Library: anything anyone filed



Ask: When was the chiller shutdown agreed?
Agreed for Saturday, 6 am to 2 pm [1], once the cooling plan is confirmed [2].

Search every email the team has saved, attachments included, or ask a question and get an answer with its sources. Set it up once in **Library › Settings**: your shared projects folder.