emailbudAI

Storyboard & Library Guide

File every email to its project, clear your Inbox as you go,
and search everything your team has saved.

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Projects | The Storyboard | Saving and Inbox folders | The project library

Contents

1. At a glance . . . 2
What you need . . . 2
2. Setting up your projects . . . 3
Getting the most out of projects . . . 3
3. The Storyboard . . . 4
The Storyboard: emails grouped by project . . . 4
4. Saving emails to the project folders . . . 7
5. Moving saved emails into Inbox folders . . . 8
Tips . . . 8
6. Sent emails and File on Send . . . 10
7. Filing a whole conversation . . . 11
8. The project library . . . 12
9. A typical week . . . 15
10. Troubleshooting . . . 16
11. Quick reference . . . 17

1. At a glance

emailbudAI's **Storyboard** and **project library** take care of filing: every email goes to the project it belongs to, is saved into that project's folder for the record, leaves your Inbox, and can then be found by anyone on the team, with the AI answering questions about it.

1. Projects Names, job numbers, people and a save folder for each job.	**2. Storyboard** emailbudAI sorts every email into its project. You check and correct.	**3. Save Emails** Saved as .msg/.eml into the project folder, marked in Outlook.	**4. Inbox folders** Saved emails move out of the Inbox into the project's folder.	**5. Library** Everyone searches and asks the AI about everything saved.

You want to…	Use	Chapter
Tell emailbudAI about your jobs	**Projects** (top bar)	2
See every email sorted by project, and fix the odd one	**Storyboard** tab	3
Save emails into the project folders	**Save Emails** on the Storyboard	4
Clear filed emails out of your Inbox	**Move to Inbox Subfolder** on each project	5
File sent emails without thinking about it	**Sent emails…** and **File on Send**	6
File a whole email chain at once	**Conversations** on the Storyboard	7
Find an email anyone has saved, or ask the AI about a job	**Library** tab	8

What you need

- emailbudAI installed and your mail connected (classic Outlook, Microsoft 365 / new Outlook, or IMAP). See the **User Guide**, chapters 2 and 3.
- A folder for each project's emails, ideally on a shared drive such as `\\fileserver\Projects`. A SharePoint, OneDrive or Teams folder works for saving too.
- For moving emails out of the Inbox: classic Outlook or a Microsoft 365 account (IMAP mail is saved but stays in the Inbox).
- For the library: everyone using it needs access to the shared project folders.

> **Privacy.** Sorting, saving and searching all happen on your PC and in your own project folders. Nothing is sent to emailbudAI's servers, and the AI runs on your PC unless you chose an online AI engine.

2. Setting up your projects

A project groups email addresses (people or companies) that belong to the same job. Open **Projects** to create them.

- **Create a project** and add the email addresses or domains that belong to it.
- **Icon** and **Colour**: shown in the email list, the email header and beside every task. Colours are adjusted to stay readable in light and dark themes.
- Each project can be **excluded from the To Do list** and/or **from reports**.
- In To Do, tasks are grouped under their project; tasks with no project sit under **No project**.
- The window's three panels (**Projects**, **Addresses in project** and **Senders in your mail**) can be made wider or narrower: drag the gap between two panels. Resize the window and the lists grow or shrink; the buttons under them always stay in full view.

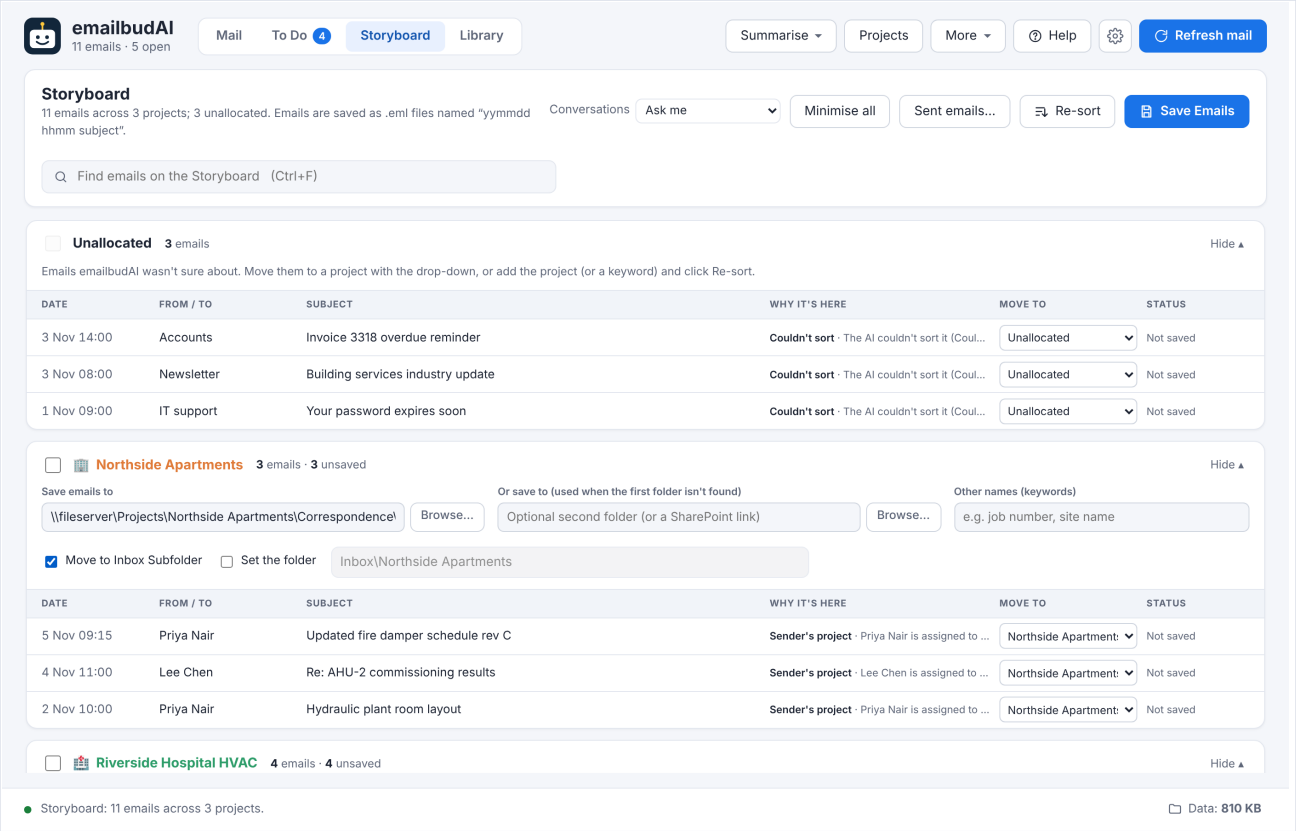
Getting the most out of projects

- **Keywords are the most reliable rule.** Add the job number, site name and any short names people use in subjects (for example `P2231, Riverside, RH`). A subject that names a project wins over everything else.
- **Assign the people who only work on one job** (a client's project manager, a site contact) to that project. Don't assign people who work across many jobs; leave them to the subject, content and AI rules.
- **Assign a whole company** by adding its domain (for example `@riverside-health.com.au`) if everything from them is about one job.
- **Set the save folder once**, on the Storyboard or in Projects, and leave it. With the library set up, emailbudAI fills it in by itself when exactly one project folder matches the project's name or job number.

3. The Storyboard

The Storyboard: emails grouped by project

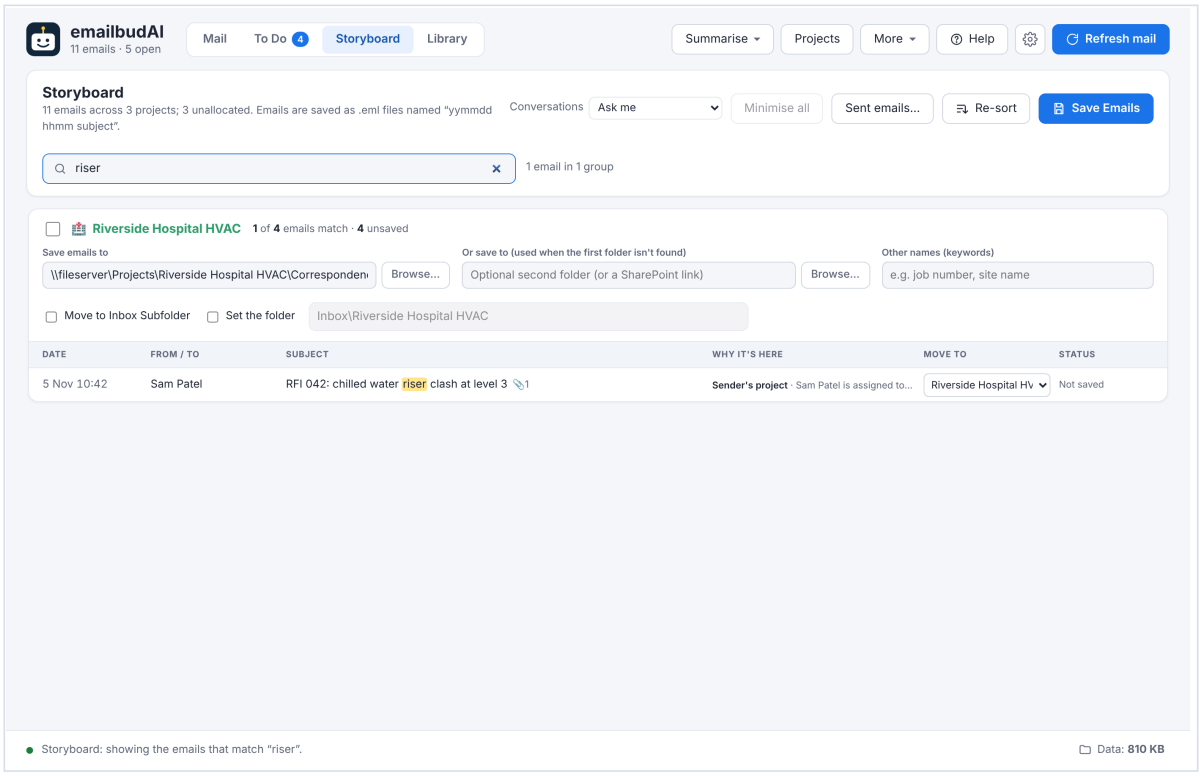
The **Storyboard** tab sorts your emails into your projects and saves them into each project's folder. The first time you open it, emailbudAI sorts every email in the archive; after that it sorts only new ones. With the local AI this first sort can take a while (roughly a few seconds per 10 emails); you can keep using the rest of emailbudAI meanwhile.



The Storyboard: Unallocated at the top, then each project with its save folders, keywords, Inbox folder and emails.

Find: type in the box under the Storyboard's title (or press **Ctrl+F** on the Storyboard) to show only the emails whose subject, sender, project, keywords or reason contain every word you type, for example *riser L3* or a job number. Groups without a match are hidden, groups with one open, and the words are highlighted. You can select and drag the emails you find as usual. Press **Esc** or clear the box to see the whole board again.

Click a group's **Hide** or **Show** to fold it. **Minimise all**, beside Sent emails…, folds every group to its heading so you can see all your projects at once; click it again (it then says **Expand all**) to open them all. emailbudAI remembers which groups are open.



Find: typing *riser* shows only the matching email, highlighted, in its project.

How an email is placed

Order	Rule	Example
1	The **subject** names a project (its name or one of its keywords).	'P2231 riser clash' goes to Riverside Hospital HVAC, whoever sent it.
2	The **email text** names one project only.	Sam is assigned to Riverside, but the email is about Northside Apartments: it goes to Northside.
3	The **sender** (or, for sent mail, the recipient) is assigned to a project.	Sam Patel is assigned to Riverside, and the email doesn't mention another project.
4	Otherwise the **AI** reads the email and picks the project it is about.	'Weekly site meeting minutes' about the level 3 riser.

So when an address is assigned to one project but the subject or content is clearly about another, **the subject or content wins**. The AI also checks emails placed only by their sender. Emails the AI isn't sure about go to **Unallocated** at the top. The **Why it's here** column says which rule placed each email.

Sorting again and moving emails

- **Re-sort**: after adding a project, keywords or email addresses, click Re-sort to sort the emails again against your current projects. Emails you moved yourself and emails already saved stay where they are.
- **Move to**: pick a project (or Unallocated) for any email. Your choice is kept on every Re-sort.
- **Select and drag**: click an email to select it; **Ctrl-click** adds or removes one, **Shift-click** selects a range and **Ctrl+A** selects every email shown (Esc clears). Drag the selection onto any project or Unallocated, even a collapsed one, to move them all. Move to on a selected email also moves the whole selection.
- An email already saved for one project and moved to another (or to Unallocated) shows **Not saved** again, and the file you saved is taken out of the old project's folder, so that folder holds only what belongs there. Save Emails then saves it into the new project's folder. Nothing is lost: a file from a network or local folder

is kept on your PC for 30 days (click **Show** on the message to open that folder), and a SharePoint / OneDrive file goes to that site's recycle bin. A copy a colleague saved is never touched, and neither is a file someone changed after it was saved: the message says it was left where it is.

- **Other names (keywords)**: a job number, site name or short name the project is also known by, separated by commas (for example 'Riverside, P2231'). Keywords count as the project's name in the rules above.
- Double-click an email to open it in Outlook.

4. Saving emails to the project folders

Saving emails

1. For each project, enter the folder in **Save emails to**, or click **Browse...**. A network folder such as `\\fileserver\Projects\...` works. **Open** shows the folder in File Explorer. Optionally add a second folder in **Or save to**: it is used when the first one isn't found (for example a local copy when you're away from the office network).
2. Tick the box beside each project you want to save. A ticked project with no save folder is **left out** (it shows 'No save folder: left out') and the other ticked projects are saved as normal.
3. Click **Save Emails**. Every unsaved email in the ticked projects is saved, and its **Status** changes to **Saved**. Click Saved to show the file in File Explorer. With the project library set up, an email a colleague has already saved in that folder isn't saved again: its status shows **Saved by** and their name.

Folders must already exist. emailbudAI saves into the first of the project's two folders that exists and never creates folders. If neither exists (or the network drive isn't connected), each email shows **Folder not found** and nothing is saved; fix the folder or reconnect the drive, then click Save Emails again.

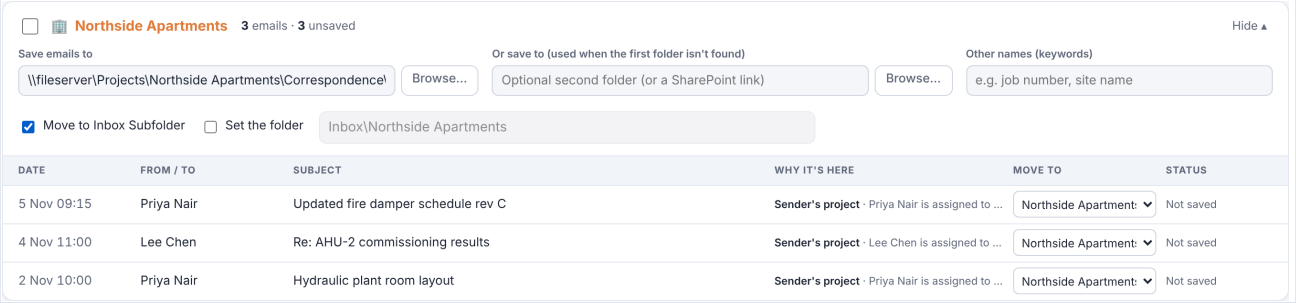
Your mail	Saved as
Classic Outlook	Outlook message (.msg), exactly as in Outlook, with attachments.
Microsoft 365 / new Outlook	Standard email file (.eml) downloaded from Microsoft, with attachments. Opens in Outlook.
Gmail and other IMAP	Standard email file (.eml) downloaded from the server, with attachments.

Marked in Outlook. With **Mark saved emails in Outlook** ticked (beside Re-sort; on by default), each saved email also gets the green **Saved with emailbudAI** category in Outlook, so you can see at a glance what has been filed, and sort or search by it in Outlook. A small green square beside **Saved** shows it was marked. Emails saved before you turned this on, or saved by a colleague, are marked the next time you click Save Emails. Your other categories are kept.

Your mail	Marking in Outlook
Classic Outlook	Works straight away. The category is added to your category list in green the first time.
Microsoft 365 / new Outlook	The first time, emailbudAI asks for one extra permission: click **Allow…** in the message and approve it with the code shown, like the first sign-in. This lets emailbudAI change categories (it still never sends or deletes mail). Reading your mail keeps using the read-only sign-in.
Gmail and other IMAP	Not available: IMAP mail has no Outlook categories, so the option is hidden.

5. Moving saved emails into Inbox folders

Saving an email files a copy in the project folder; the email itself stays in your Inbox. Turn on **Move to Inbox Subfolder** for a project and Save Emails also moves its saved emails out of the Inbox into an Outlook folder for that project, so your Inbox only holds what still needs filing.



A project with Move to Inbox Subfolder ticked. The greyed field shows the Outlook folder emailbudAI will use; tick Set the folder to type your own.

Under each project's save folders, tick **Move to Inbox Subfolder** to tidy your Inbox as you file. When you click **Save Emails**, each of the project's emails that is saved and still in your Inbox is moved into an Outlook folder for the project. emailbudAI uses, in this order:

- the folder in the field next to the tick-boxes, for example **Inbox\Projects\Riverside Hospital**;
- otherwise, a folder anywhere under your Inbox with the project's name (the one nearest the top if there are several);
- otherwise, a new folder directly under the Inbox, named after the project.

The folder it uses is written into the field, so you can see where the emails went. The field is greyed out and filled in by emailbudAI until you tick **Set the folder**: then you can type your own path, and any folder in it that doesn't exist yet is created. Hover over either tick-box for a reminder of what it does.

- Only **saved** emails move, so nothing leaves the Inbox before it's filed. An email that couldn't be saved stays in the Inbox.
- Emails you've already put in another Outlook folder yourself are left where they are. Sent emails aren't moved.
- If you move an email to a different project on the Storyboard, the next Save Emails moves it on to that project's folder.
- It works with classic Outlook and Microsoft 365 accounts (Microsoft 365 asks once for the same optional permission as marking saved emails); with IMAP accounts the emails are saved and stay in the Inbox.
- A saved email that's been moved shows a small arrow after **Saved**; hover over it to see the folder.

Tips

- **Already have project folders in Outlook?** Leave Set the folder unticked: emailbudAI finds your existing folder with the project's name anywhere under the Inbox and uses it.
- **Want them grouped?** Tick Set the folder and type a path such as `Inbox\Projects\Riverside Hospital`; the Projects folder is created the first time.
- **Turned it on later?** The next Save Emails moves every email of that project that is already saved and still in the Inbox.

- **Changed your mind about an email?** Move it to another project on the Storyboard; the next Save Emails moves it on to that project's folder too.

6. Sent emails and File on Send

Sent emails are sorted on the Storyboard like received ones (by subject and content, then by the project their recipients are assigned to). Click **Sent emails…** beside Re-sort for two options:

- **Save my sent emails automatically**: after each mail download (by you or the scheduler), sent emails emailbudAI is sure about are saved to their project's folder and marked in Outlook, with no ticking needed. Ones it isn't sure about wait in Unallocated. It applies to emails sent from the time you turn it on, and projects with no save folder are left out.
- **File on Send** (new Outlook for Windows only): when you click Send, emailbudAI says which project it will file the email to. It decides instantly: a project named in the subject or text comes first; next, an email in the same conversation already filed on the Storyboard (the same subject, or a very similar one, ignoring RE:, FW: and [EXTERNAL]); then the project the recipients are assigned to. Click **Send** to accept, or **Change project** to open the **File to project** pane, pick another project (or **Don't file this email**), click **Use this** and Send again. Choose **Ask for every email** or **Ask only when emailbudAI isn't sure**. The email is filed and saved after the next mail download, even if automatic saving is off.

> **Note.** File on Send needs the new Outlook for Windows (emailbudAI turns the option on only when it finds new Outlook on the PC, or after its pane has been opened there) and the latest add-in file (User Guide, chapter 12: Updating or removing the add-in). In classic Outlook and Outlook on the web, emails are sent without the check. If emailbudAI isn't running, your email is sent straight away, unfiled.

Files are named `yymmdd hhmm subject`, for example `261105 1042 RFI 042- chilled water riser clash at level 3.msg`. Characters Windows doesn't allow in file names are replaced (':' and '/' become '-'), long subjects are shortened, and if a file of that name already exists a number is added, e.g. ' (2)', so nothing is overwritten. Unallocated emails can't be saved: move them to a project first. If an email fails, its status says why; fix the problem and click Save Emails again to retry only the ones not yet saved.

7. Filing a whole conversation

When you file an email to a project, emailbudAI finds the rest of its conversation, earlier and later emails and the ones you sent, and offers to file them too. A bar appears above the board, for example **2 more emails in this conversation: 1 Unallocated, 1 in Westfield Mall**, with three buttons:

- **File all to <project>**: files the Unallocated ones.
- **Review…**: shows each email with a tick box. Unallocated emails are ticked; emails in another project are only moved if you tick them; emails already saved to another project's folder stay where they are.
- **Just this one**: files only the email you moved.

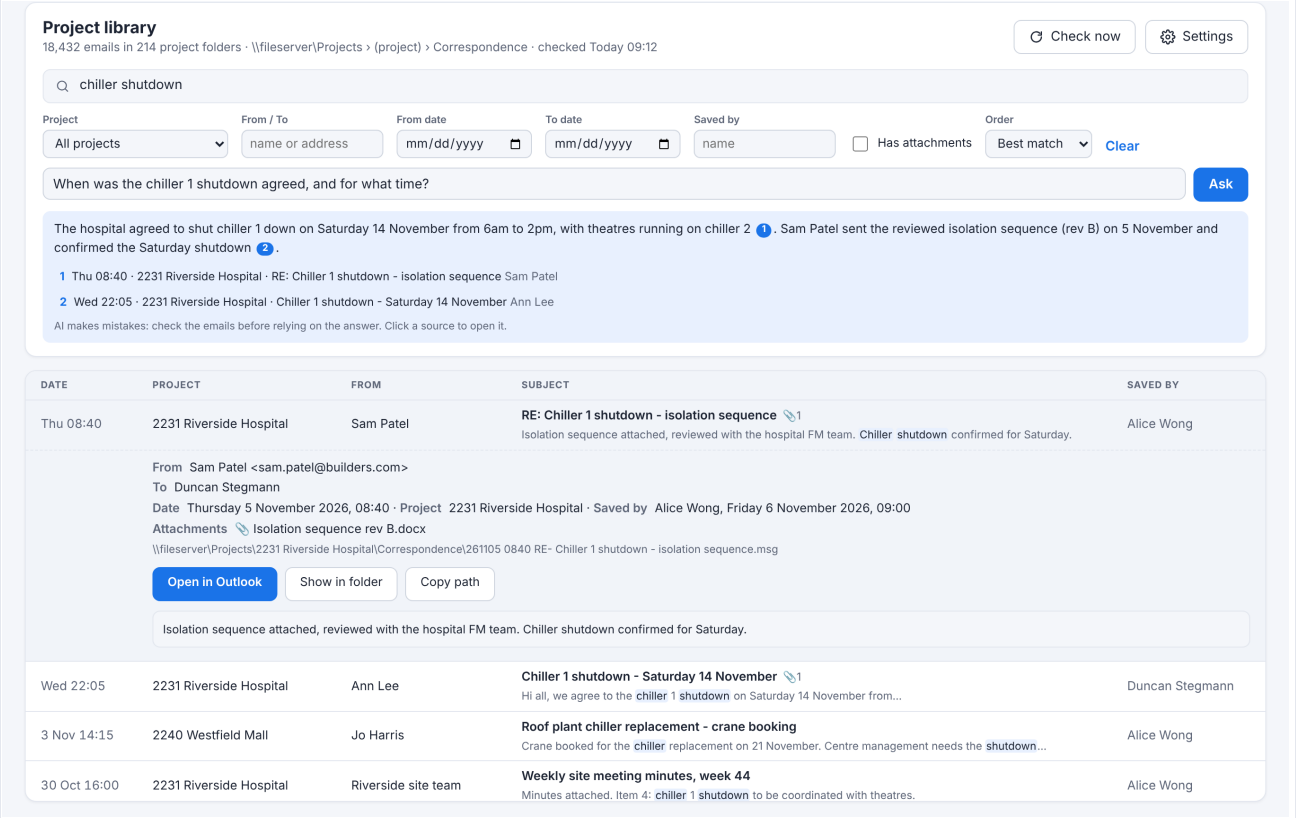
After that, **new replies follow**: when mail is sorted, a new email in a conversation filed to a project goes to that project, marked 'Same conversation', unless its subject names a different project. Before **Save Emails**, emailbudAI also checks for Unallocated emails from the same conversations and offers to file them first. With File on Send, the pane offers to file the earlier emails of the conversation you are replying to.

Choose how this works under **Conversations** at the top of the Storyboard: **Ask me** (the default), **Always file them too**, or **Leave them** (only the emails you move are filed, and replies are not moved by conversation).

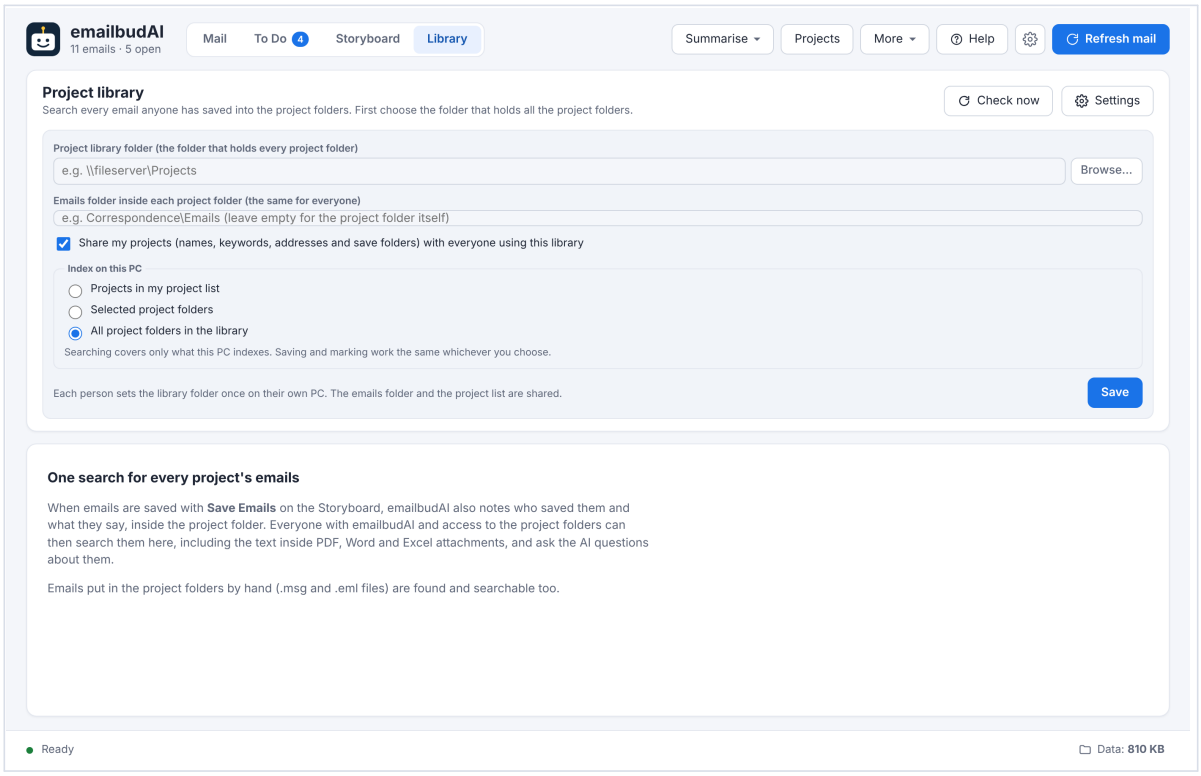
> **Note.** emailbudAI recognises a conversation by the ID Outlook or Microsoft 365 gives it, or by the reply headers for IMAP accounts. Emails downloaded before this version get their conversation ID at the next mail refresh. For older emails without one, emails count as the same conversation only when the subject matches (ignoring RE: and FW:) and at least one person, other than you, is on both. Short, general subjects such as 'Meeting' are never linked.

8. The project library

When your project folders are on a shared drive, the **Library** tab lets everyone with emailbudAI search every email anyone has saved there, including the text inside PDF, Word, Excel and PowerPoint attachments, and ask the AI questions about the correspondence. There is no server to set up: emailbudAI keeps the information it needs inside the project folders themselves.



The Library: a search for 'chiller shutdown' across all projects, an AI answer with its numbered sources, and one email opened to show its details.



Library settings: the library folder, the emails folder inside each project, sharing projects and what this PC indexes.

Setting it up

1. Open the **Library** tab. The first time, the settings are open; later click **Settings**.
2. **Project library folder**: the folder that holds every project folder, for example `\\fileserver\Projects`. Each person sets this once on their own PC. A network path (\\server\share) is best; a mapped drive letter works too, and colleagues can map it to a different letter.
3. **Emails folder inside each project folder**: where emails go in every project, for example `Correspondence\Emails`. Leave it empty to use the project folder itself. This setting is **shared**: one person sets it and everyone uses it.
4. **Index on this PC**: choose which project folders this PC reads and searches. **Projects in my project list**: only the folders of your projects (the folder a project saves to, or a folder whose name contains the project's name or a keyword such as its job number); this follows your project list as it changes. **Selected project folders**: tick folders from the list, with the ticked ones shown at the top (filter it by name or job number; **Tick my projects** is a quick start). **All project folders in the library** (the default): everything. A smaller choice indexes faster; searching covers only what is indexed. Saving, the check for copies colleagues have saved, and marking in Outlook work the same whichever you choose.
5. **Share my projects** (on by default): your projects, keywords, assigned addresses and save folders are shared with everyone using the library, and theirs with you. Renaming, adding or removing a project reaches everyone within a few minutes.
6. Click **Save**. emailbudAI reads the library in the background; for a large library the first time can take a while. After that it checks for new emails every 5 minutes (or click **Check now**).

With the library set, a project with no save folder gets one automatically when exactly one project folder matches its name or a keyword (for example the job number 2231 matches '2231 Riverside Hospital'). You can still change it on the Storyboard.

Searching

- Type in the search box: results appear as you type, best matches first, with the matching words highlighted. Every word must appear; the start of a word is enough ('commission' finds 'commissioning'). Put words in quotes for an exact phrase: `"level 3 ceiling void"`.
- Narrow the results by **Project**, **From / To**, a date range, **Saved by** and **Has attachments**, or choose **Newest first**.
- **Sent / received**: **Sent by me**, **Sent by my organisation** (anyone with your email domain, e.g. @yourcompany.com.au) or **Received from outside**. Sent emails show a green **Sent** mark in the results.
- Click an email to see who it was from and to, its attachments, who saved it and where the file is. **Open in Outlook** (or double-click) opens the original email with its attachments; **Show in folder** opens File Explorer at the file.
- An email saved in more than one project appears once, with '+1' beside the project; hover to see where else it is.
- Emails put into the project folders by hand (.msg and .eml files, up to three sub-folders deep) are found and searchable too.

Asking the AI

Type a question in the box below the filters and click **Ask**, for example 'When was the chiller 1 shutdown agreed, and for what time?'. emailbudAI finds the most relevant saved emails (in the chosen project, or all of them), the AI answers from those emails only, and each fact is numbered with its source. Click a source to open the email. As always, **AI makes mistakes**: check the source emails before relying on the answer.

How it works, and who can see what

Where	What is kept there
`<library>\_emailbud\library.json`	The shared settings: the emails folder name and the shared project list.
`<emails folder>\.emailbud\<user>.jsonl`	A hidden folder in each project's emails folder. One file per person: a line for each email they saved (who, when, the email's text and its attachments' text). Each PC writes only its own file, so people saving at the same time never clash.
Your PC: %APPDATA%\emailbudAI\library.db	This PC's search index, built from those files. It can be deleted at any time; it is rebuilt.

Because the index files sit inside the project folders, the library follows your folder permissions: anyone who can't open a project folder can't search its emails either. Anyone who **can** open it can search the text of the emails saved there, just as they could open the emails themselves. Deleting or moving an email file removes it from search at the next check.

> **Note.** Your company's IT team may lock some Storyboard and Library settings for everyone (they show 'Set by your administrator'). See the **IT Support Guide**.

9. A typical week

1. **Monday morning:** Refresh mail (or let the scheduler do it overnight). Open the Storyboard and look at **Unallocated**: drag each email onto its project, or add the keyword that was missing and click **Re-sort**.
2. Skim each project for anything in the wrong place (the **Why it's here** column says why it was put there) and move it.
3. Tick the projects to save and click **Save Emails**. Saved emails are marked in Outlook and, for projects with **Move to Inbox Subfolder**, leave your Inbox.
4. When the conversation bar offers to file the rest of a chain, choose **File all** or **Review…**.
5. **During the week:** with File on Send (new Outlook), sent emails are filed as you send them; with **Save my sent emails automatically**, they're saved after each download.
6. **Need something?** Open the Library, search for the job number or a phrase, or ask the AI, e.g. *What did the client agree about the level 3 riser?*, and open the numbered sources to check.

10. Troubleshooting

What you see	Why	What to do
Lots of emails in Unallocated	No keyword, address or clear subject matched, and the AI wasn't sure.	Add keywords (job numbers, site names) and assign the main contacts, then **Re-sort**. Drag the rest.
An email is in the wrong project	An address assigned to one project, or a keyword shared by two.	Move it (your choice is kept on every Re-sort). Make keywords more specific.
Folder not found	The save folder doesn't exist, or the network drive isn't connected.	Fix the path (Browse…), or reconnect the drive / VPN, then Save Emails again. emailbudAI never creates save folders.
No save folder: left out	The project is ticked but has no save folder.	Enter a folder in Save emails to.
Saved emails stay in the Inbox	Move to Inbox Subfolder is off, the account is IMAP, or Microsoft 365 hasn't been allowed to change mail yet.	Tick it for the project; for Microsoft 365 click **Allow…** when asked. IMAP mail can't be moved.
Emails moved to an unexpected Outlook folder	A folder with the project's name already existed somewhere under the Inbox.	Tick **Set the folder** and type the folder you want.
'Left where it is' after moving an email to another project	The saved file was saved by a colleague, or changed after saving.	Nothing to do: emailbudAI never removes those. Tidy the old folder by hand if needed.
The Library finds nothing	The library folder isn't set, this PC doesn't index that project, or the first read is still running.	Library > Settings: check the folder and **Index on this PC**; wait for the first read, or click **Check now**.
A colleague's emails don't appear	They saved to a folder you can't open, or outside the library folder.	Check folder permissions and that both of you use the same library folder.
The AI answer looks wrong	AI makes mistakes, and only answers from the emails it found.	Open the numbered sources; narrow by project or date and ask again.

Still stuck? Click **Help** in emailbudAI: it sends your message and the app's logs to support and emails you a case number.

11. Quick reference

Where	Control	What it does
Storyboard	**Find** (Ctrl+F)	Shows only the emails matching every word typed.
Storyboard	**Conversations**	Ask me / Always file them too / Leave them: what happens to the rest of a chain.
Storyboard	**Minimise all / Expand all**	Folds or opens every project.
Storyboard	**Sent emails…**	Save sent emails automatically; File on Send.
Storyboard	**Re-sort**	Sorts again against your current projects (your own moves are kept).
Storyboard	**Save Emails**	Saves the ticked projects' unsaved emails, marks them in Outlook and moves them to Inbox folders where turned on.
Each project	**Save emails to / Or save to**	The project folder, and a second one used when the first isn't found.
Each project	**Other names (keywords)**	Job numbers and names that count as the project's name.
Each project	**Move to Inbox Subfolder / Set the folder**	Moves saved emails out of the Inbox; lets you choose the Outlook folder.
Each email	**Move to**, drag, Ctrl/Shift-click	Moves one or many emails to another project.
Library	Search box and filters	Finds saved emails and attachment text across projects.
Library	**Ask**	The AI answers from the saved emails, with numbered sources.
Library	**Settings**	Library folder, emails folder, sharing, what this PC indexes, administrator settings.

More: the **User Guide** (everything else in emailbudAI), the **Quick guide** (2 pages to print), and www.emailbudai.com/help.