

emailbudAI

User Guide

Your private AI mail helper: summaries, suggested actions and tasks, running on your own PC.

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Installing | The Outlook add-in | Using every feature | Troubleshooting

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1. Welcome to emailbudAI

emailbudAI is a Windows program that reads your email, summarises it with an AI model that runs **on your own PC**, shows which messages still need action, turns those actions into To Do tasks, suggests replies, and produces a weekly minutes report. Nothing is sent to an online AI service unless you choose that option yourself.

How this guide is organised: chapters 2 and 3 install and set up emailbudAI; chapters 4 to 11 explain the main window and its features; **chapter 12 is a step-by-step guide to adding the add-in to classic Outlook, new Outlook and Outlook on the web** and chapter 13 explains how to use it; chapters 14 to 16 cover settings, your data and a quick reference; **chapter 17 is troubleshooting**.

> **Warning. AI makes mistakes, always check before you send.** The local AI is much smaller than online services and is meant to help you **review** email; check drafts and anything technical yourself.

What it can do

Feature	In one line
Reads your mail	Classic or new Outlook (Microsoft 365, Outlook.com, Exchange Online) or any IMAP account such as Gmail. Kept in a searchable archive on this PC.
Summarises with a private AI	An open AI model (Llama, Gemma and others, chosen to suit your PC) runs through Ollama, on the latest emails, a period, or only what is new.
Knows who you are	Enter your name and role once. The AI then notices when an email asks **you** to act, lists your own tasks as "You" and suggests actions from your point of view.
Shows what needs action	Recommends actions for each email, and marks every message Open, Replied or Closed out by reading your Sent mail.
Suggests replies	Drafts a reply in your words and tone, makes it more or less formal, reviews a reply you wrote, and flags in red anything it cannot answer reliably.
Keeps a To Do list	Lists, My Day, Important and Planned. Syncs with Microsoft To Do or Outlook Tasks. Every task links back to its email.
Groups work into projects	Group senders into coloured projects with icons and produce a weekly minutes PDF for everything or for one project.
Files emails by project	The Storyboard sorts your emails into projects with the AI and saves them, with attachments, into each project's folder.
Searches everyone's saved emails	The Library searches every email anyone has saved into the shared project folders, including attachment text, and the AI answers questions about them.
Runs by itself, stays tidy	A scheduler checks and summarises at intervals or when the PC is idle. You choose how much mail to keep, and see how much space it uses.
Works inside Outlook	An add-in shows the summary, suggested tasks and reply drafts beside the email in classic Outlook, new Outlook and Outlook on the web.

What you need

- Windows 10 (version 1803 or later) or Windows 11, 64-bit. An ARM PC works but runs more slowly.
- Free disk space for Python, Ollama and the AI model you choose: about 9 GB with the small model, more for larger models. The installer shows the exact figure before it starts.

- **8 GB of memory or more** for the small AI model; 16 GB or a graphics card for the larger ones. The installer checks your PC and recommends a model.
- An internet connection to install and to read online mail. For the Outlook add-in, a Microsoft-hosted mailbox (Microsoft 365, Exchange Online or Outlook.com; chapter 12).

2. Installing emailbudAI

You install emailbudAI with a single file, **emailbudAISetup.exe**. It installs a private copy of Python, Ollama (the program that runs the AI), the AI model you choose and emailbudAI itself, with no further questions after you press Install.

Before you start

- You do **not** need administrator rights. Everything installs for your own Windows account.
- If Windows shows a blue **SmartScreen** window saying 'Windows protected your PC', click **More info** then **Run anyway**.
- If your antivirus asks about the installer, allow it. If it blocks the downloads, see chapter 17.

Step 1: the welcome screen and PC check

Double-click **emailbudAISetup.exe**. The first screen describes emailbudAI and checks your PC: memory, processor, graphics card and a one-second speed test.



The welcome screen with the PC check (sample PC).

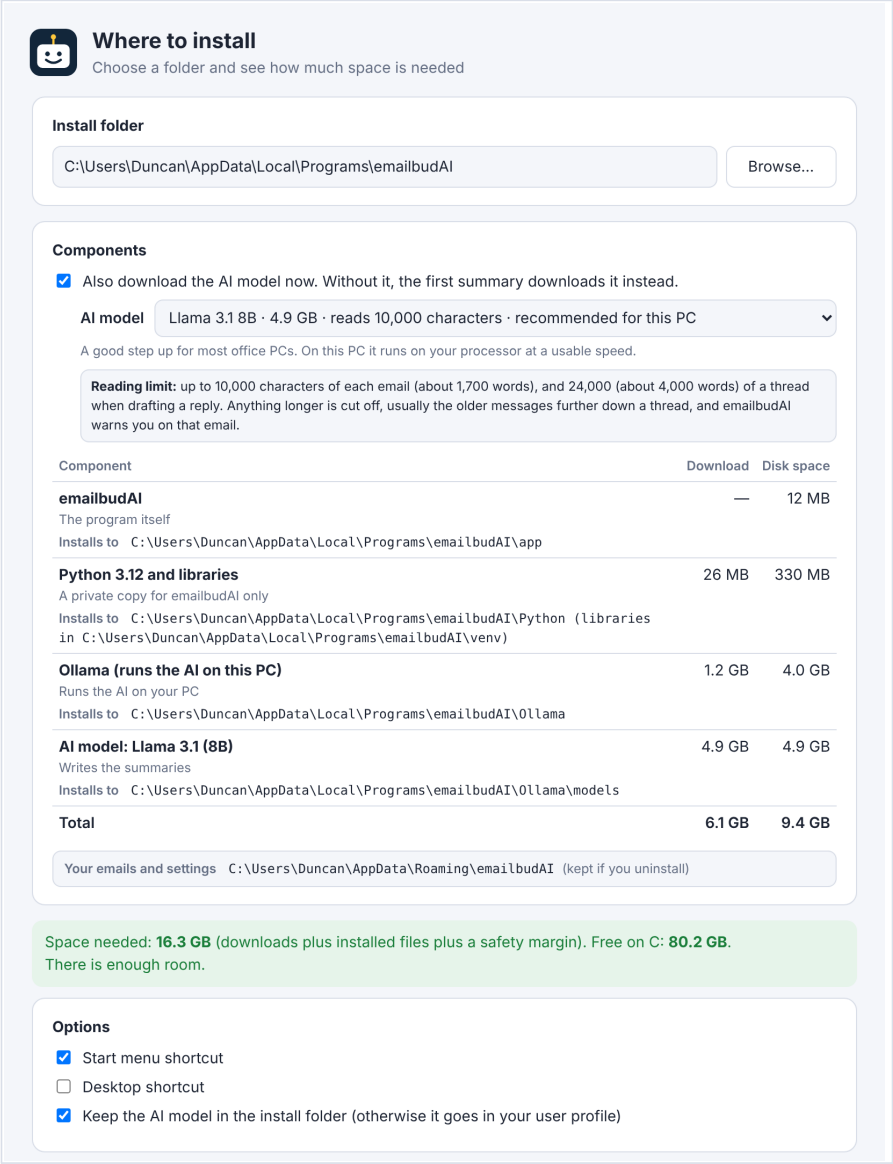
Rating	Meaning
Good	Summaries should be quick. Typically 16 GB or more of memory, or a graphics card the AI can use.
Ok	Your PC will cope. A typical summary takes under a minute.
Slow	It can run the AI, but expect a few minutes per batch of emails.
Poor	Short of memory for the AI. Reading, searching and To Do work, but summaries are not recommended.

> **Note.** Built-in graphics (Intel UHD, Iris Xe, Arc Graphics, AMD Radeon Graphics) borrow memory from the rest of the PC. That **shared GPU memory is ignored** in the check, because loading the AI into it can starve Windows of memory and cripple the system. The AI then runs on the processor. Proper graphics cards (NVIDIA, AMD Radeon RX, Intel Arc A/B series) are measured by their own memory.

Step 2: the licence agreement

Read the emailbudAI licence agreement, choose **I accept the terms of the licence agreement** and click **Next** (Next stays greyed out until you accept). **Show the third-party notices** lists the other software emailbudAI installs (Python, its libraries, Ollama) and the AI models' own licences. Both are also in the app under **More > Licence agreement and notices**, and the agreement is at www.emailbudai.com/eula.txt. If the agreement changes in a later version, emailbudAI asks you to accept it again.

Step 3: where to install, and which AI model



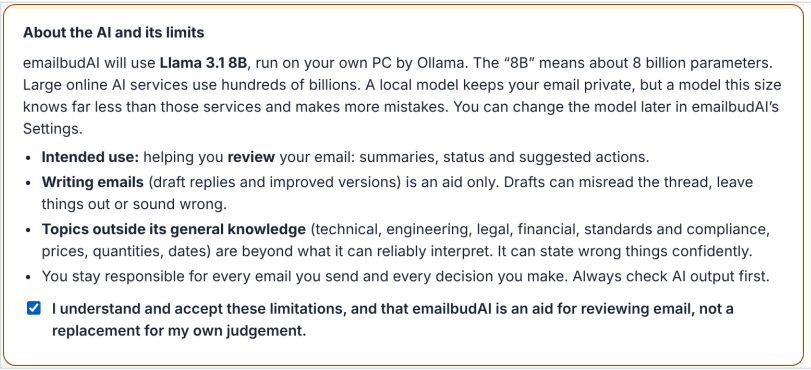
Install folder, AI model with its reading limit, and where each part installs (sample PC).

- **Install folder**: the default is `C:\Users\<you>\AppData\Local\Programs\emailbudAI`. Click **Browse...** for another local drive. Network drives, Program Files and the Windows folder are not accepted.
- **AI model**: the list shows each model with its download size, how much of each email it reads, and how it suits this PC (*recommended*, *slow* or *too big*). The recommended one is pre-selected. Bigger models write better but are slower.
- **Reading limit**: how much of one email the model reads (for example 10,000 characters, about 1,700 words), and how much of a thread when drafting a reply. Anything longer is cut off, and emailbudAI warns you on that email (chapter 5).
- **Installs to**: every component shows the folder it goes to. Your emails and settings are kept separately (and kept if you uninstall).
- The space check compares what is needed with the free space on the drive. If there is not enough, Install stays greyed out and it says how much more is needed.

Model	Download	Reads per email / per reply thread	Suits
Llama 3.2 3B	2 GB	6,000 / 16,000 characters	Any PC; fine for summaries
Llama 3.1 8B	4.9 GB	10,000 / 24,000	16 GB of memory
Gemma 3 12B	8.1 GB	14,000 / 32,000	A 12 GB graphics card
gpt-oss 20B	14 GB	20,000 / 40,000	32 GB of memory, no graphics card needed
Mistral Small 3.2 24B / Gemma 3 27B	15 / 17 GB	20,000 / 40,000	A 24 GB graphics card
Llama 3.3 70B	43 GB	20,000 / 40,000	Workstations with 48 GB of graphics memory

About the AI and its limits

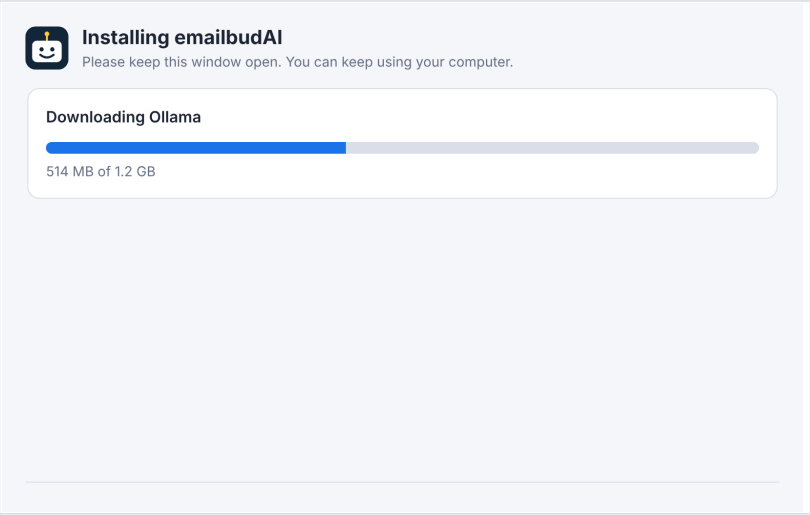
Below the components, the installer explains what the model can and cannot do. You must tick the box to accept these limits before **Install** becomes available.



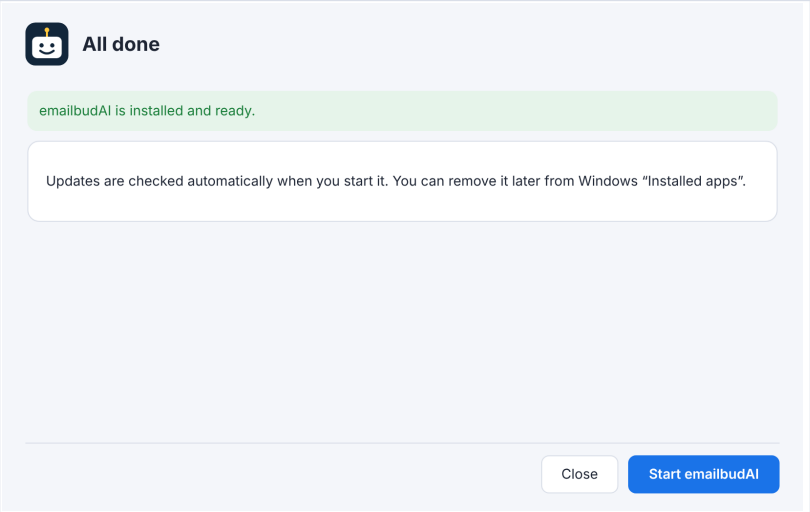
The statement about the AI's limits, with the box you tick to accept them.

Step 4: installing

Click **Install**. Everything is **downloaded first and checked** (Python by its publisher's signature, Ollama by its published checksum or signature), then installed one piece after another with no windows popping up. Interrupted downloads resume where they stopped.



Progress while downloading. You can carry on using your PC.



The finished screen. Start emailbudAI from here, or later from the Start menu.

What was installed, and where

Folder (inside your install folder)	Contents
Python	A private Python 3.12 used only by emailbudAI. Any Python you already have is left alone.
venv	emailbudAI's own Python environment and libraries.
app	The emailbudAI program files.
Ollama	The Ollama program and, if you ticked the option, the AI model (Ollama\models). An Ollama already on the PC is reused where it is.
logs	install.log and python-setup.log. Send these if you ever need help with an installation.
emailbudAI.exe, install.json	The launcher (also the updater) and its record of what is installed.

Your emails, settings and saved passwords are **not** in the install folder. They live in your user profile (chapter 15), so reinstalling or uninstalling never loses them.

Upgrading from mAIlmate, mAIlwright or Email Manager

If the installer finds a copy under an earlier name, it upgrades it: it moves the AI model across, points the scheduler, the add-in service and shortcuts at emailbudAI, and removes the old program. Your emails, settings and saved passwords are kept. If Python's own installer refuses to install because an old copy is still registered, the installer clears it or unpacks Python directly, so no action is needed.

Updates and uninstalling

- While emailbudAI is open, it tells you when a new version is out: a Windows notification with an **Update now** button, a blue bar at the top of the window and an **Update to ...** item on the tray icon's menu. It checks every few hours and when the PC wakes from sleep.
- **Update now** hands over to the launcher: it downloads the update, checks its signature, closes emailbudAI, puts the new files in place and checks them. If anything goes wrong the previous version is put back. **Later** hides the bar until the next version.
- A **security update** shows an amber bar and can't be skipped. A version marked as **required** shows a red bar: emailbudAI updates itself before it next starts.

- When you start emailbudAI, the launcher also checks (at most every 4 hours) and offers **Update now**, **Not now** or **Skip this version**. Check at any time with **More > Check for updates...**
- IT can choose how updates happen with the silent-install option `--updates=auto|notify|held` or the administrator policy setting **How new versions are installed**: **notify** (the default) as above, **auto** installs each new version when emailbudAI starts, **held** turns checks and notices off because IT installs new versions itself.
- To uninstall: Windows **Settings > Apps > Installed apps > emailbudAI > Uninstall**. You can also remove Ollama and the AI models. Your saved emails and settings are not deleted.

3. First-time setup

Sign in to your emailbudAI account

emailbudAI needs you to sign in once on each PC before it opens. Your account works on **one PC at a time**.

1. Type your email address and click **Email me a code**. Enter the 6-digit code from the email (check your junk folder) and click **Sign in**. There is no password.
2. If you were sent an **invite code** (`EB-XXXX-XXXX`), click **I have an invite code** and type it in, or emailbudAI asks for it. It makes you a **First adopter**: free for life, for you on your own PC. First adopters' PCs need at least 8 GB of memory; the sign-in screen shows what this PC has.
3. If your account is already on another PC, emailbudAI asks **Move your account to this PC?** Moving signs the other PC out. You can move twice in any 30 days; if a PC broke, contact support to reset it.

Note. Your account and its invite are for you, not your employer or colleagues. emailbudAI never sends your emails to its server: only your email address, the PC's name, its memory and graphics card and the emailbudAI version. See **More > Account & subscription** for your plan, or to sign out on this PC.

Where is your email?

Next, emailbudAI asks **Where is your email?** You can change this later with **More > Mail account...**

Which option should I choose?

Option	Choose it if...	Notes
Outlook desktop app on this PC	You use **classic** Outlook.	No password needed. Classic Outlook must be installed, open and signed in.
Microsoft 365 / Outlook.com / Exchange Online	You use **new Outlook**, or any Microsoft online mailbox.	Read-only. Needs a one-time, free, five-minute app registration (below).
Email account (IMAP)	You use Gmail, Yahoo, iCloud, Exchange Server or another provider.	Needs your server and (usually) an app password.

Tip. Not sure which Outlook you have? New Outlook has a **New Outlook** toggle at the top right of the window. Classic Outlook has a File menu and a Home / Send / Receive ribbon.

Option 1: classic Outlook

1. Make sure classic Outlook is installed, open, signed in and showing your mail.
2. Choose **Outlook desktop app on this PC**, set how many days of mail to download, and click **Connect & download**.
3. If Windows or Outlook asks whether to allow access, allow it.

Note. Outlook and emailbudAI must run at the same permission level. Do not run either one as administrator.

Option 2: Microsoft 365, Outlook.com or new Outlook

emailbudAI reads your Inbox and Sent Items through Microsoft Graph with the read-only **Mail.Read** permission. It can never send, change or delete mail.

1. Go to **entra.microsoft.com** and sign in with the same Microsoft account as your mailbox. (A personal Outlook.com account with no organisation needs a free Azure account first: azure.microsoft.com/free.)
2. Open **Entra ID > App registrations > New registration**. Name it **emailbudAI**. For supported account types choose *Accounts in any organizational directory and personal Microsoft accounts*. Leave Redirect URI empty. Click Register.
3. Open **Authentication**, then **Advanced settings**, set **Allow public client flows** to **Yes** and Save.
4. Open **API permissions > Add a permission > Microsoft Graph > Delegated permissions**. Tick **Mail.Read** (and **Tasks.ReadWrite** for Microsoft To Do sync). Click Add permissions. If a work account shows 'Admin consent required', ask your IT administrator.
5. On the **Overview** page, copy the **Application (client) ID**.
6. In emailbudAI choose **Microsoft 365 / Outlook.com / Exchange Online**, paste the ID (leave Tenant as `common`) and click **Sign in...**. A browser page opens: enter the code shown, sign in and approve.
7. Click **Connect & download**.

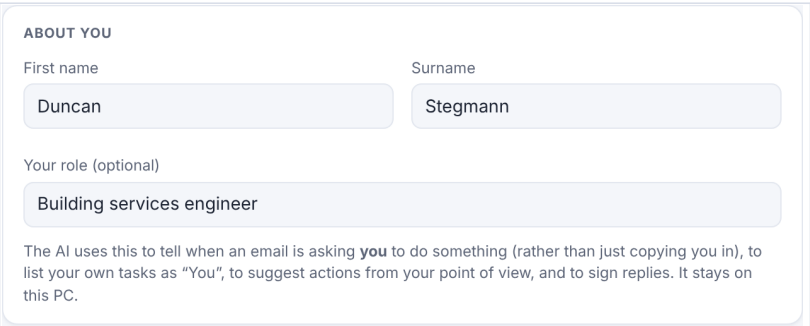
Option 3: an IMAP email account

1. Choose **Email account (IMAP)** and pick your provider so the server fills in.
2. Enter your email address and password. Most providers require an **app password** instead of your normal password.
3. Tick **Remember password** to keep it in Windows Credential Manager.
4. Click **Connect & download**.

Provider	What to do
Gmail	Turn on 2-Step Verification, then create an **app password** in your Google account security settings and use that 16-character code.
Yahoo / iCloud / others	Create an app-specific password in your account security settings and use it here.
Exchange Server (company servers)	Pick IMAP and *Exchange Server*. Ask IT for the IMAP server and make sure IMAP is enabled for your mailbox.

Tell emailbudAI who you are

Open **Settings** (the gear, top right) and fill in **About you**: first name, surname and, optionally, your role. Until you do, a small tip under the AI summary reminds you. Chapter 14 explains what the AI does with this.

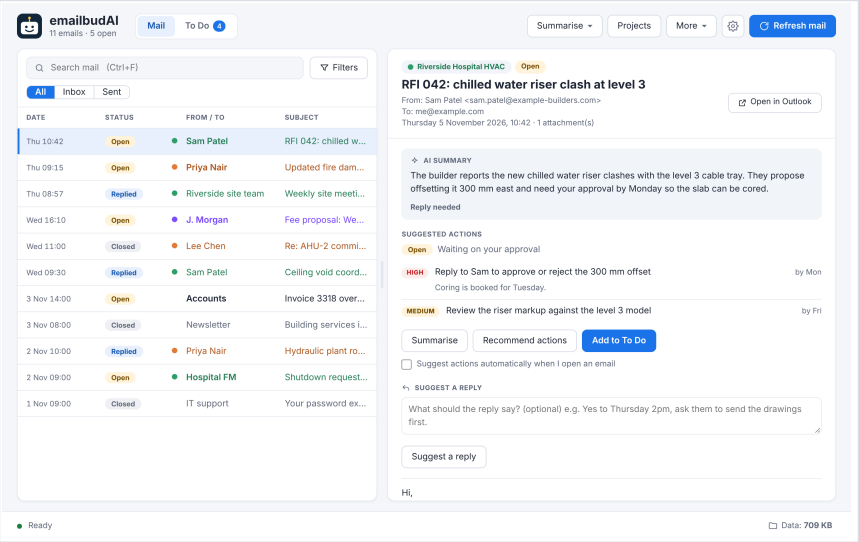


Settings > About you.

The AI settings

Setting	What it does
AI engine	**Ollama** (the default, runs on this PC and keeps your email private). A cloud option using a Claude API key is also available; if you choose it, email text is sent to that service.
Server address	Where Ollama listens. The default `http://localhost:11434` is right for the installed copy.
Model	The model chosen in the installer. Click **Check** to list the models Ollama has and pick another. To download one, run `ollama pull gemma3:12b` (for example) in a Command Prompt.
Download the last N days	How far back to read (default 90). It is also capped by how long you keep mail (chapter 14).

4. The main window



The main window: the email list on the left, the selected email with its AI summary and suggested actions on the right.

Control	What it does
Mail / To Do / Storyboard / Library	Switch between your email, your To Do list, the Storyboard (emails grouped by project) and the Library (everyone's saved emails), both in chapter 9. The badge shows how many tasks are open.
Search box and All / Inbox / Sent	Find emails by sender, subject or text (Ctrl+F), and show one folder.
Filters	Narrow the list by **From**, **To** and a date-and-time range, with Today / Last 7 days / Last 30 days shortcuts and **Clear filters**. Works with the search words.
Date column	Date and time, e.g. 'Today 10:42', 'Wed 09:15', '2 Nov 14:30'. Hover for the full date.
Panel divider	Drag to resize the list and reading pane (double-click resets). The size is remembered.
Summarise / Projects	Summarise the latest 10 or 50, the last day, week or month, or new emails; Projects opens chapter 9's window.
More	Scheduler, Outlook add-in, weekly PDFs, Mail account, Account & subscription, Check for updates and more.
Help	Ask for help: type what happened and click **Send**. It creates a help case (e.g. HELP-00042) and emails you its number (chapter 17).
Settings (gear)	About you, text, look, mail kept on this PC and the tray options (chapter 14).
Refresh mail	Downloads new mail from your account into the archive.
Status bar	What is happening now, a Cancel button while work runs (or press Esc), and **Data**: the space emailbudAI's data uses. Click it to open the data folder.

Reading an email

- Chips at the top show the project and the status (Open, Replied, Closed out).
- **Double-click** an email (or press **Enter**, or click **Open in Outlook**) to open it in Outlook, or Outlook on the web for Microsoft 365. Moved emails are found and you're told where; deleted ones are reported.
- **AI summary**: click **Summarise** to create or refresh it.

- **Suggested actions**: click **Recommend actions**, then **Add to To Do**. Tick **Suggest actions automatically** to have them suggested for every email you open.
- **Suggest a reply**: drafts a reply to the email (chapter 8). The email text is shown underneath.

5. Summarising your email

Open the **Summarise** menu and choose how much to summarise:

Choice	What is summarised
Latest 10 emails / Latest 50 emails	The most recent messages in your Inbox.
Last day / Last week / Last month	Everything received in the last 1, 7 or 30 days.
New emails since the last run	Only mail that arrived after the previous completed run. This is what the scheduler uses.

- Work goes **newest first**, and emails already analysed are skipped, so repeating a run is cheap.
- Click **Cancel** (or press Esc) at any time; finished summaries are kept.
- With your name set (chapter 14), summaries say when you are asked directly or only copied in, and list your tasks as "You".

When an email is too long to read in full

Each AI model reads up to a set number of characters of an email (chapter 2). A thread is always read from the **most recent message back to the oldest**: Outlook puts the newest reply at the top, and when a reply was written underneath the quoted text instead, emailbudAI moves it to the top first. If the thread is longer than the model reads, it is the oldest messages that are left out. emailbudAI then shows an amber warning above the summary, in the Outlook pane and in the weekly PDF, for example:

> **Warning. Not all of this email was read.** The AI model reads up to 6,000 characters and this email is 18,758 long, so 31% was read. The rest, usually the older messages further down the thread, was not processed.

Check the older messages yourself, or choose a larger model, which reads more.

Disclaimers and signatures are left out first. Before the AI reads an email, emailbudAI removes text that isn't the message: confidentiality notices and disclaimers, 'This email originated from outside' banners, 'Please consider the environment', 'Sent from my iPhone', and signatures. It recognises common wording itself, and learns your own office's and your clients' repeated disclaimers and signatures from your archive after each mail download (a paragraph repeated word for word across several different conversations). This leaves more of the reading limit for the real content, so more of a long thread is read. Text quoted down a single conversation is never treated as repeated, a paragraph with a question in it is kept, and only the AI's copy is cleaned: saved emails are never changed. When part of an email still isn't read, the warning says how much was left out, e.g. '(1,240 characters of disclaimers and signatures were left out first)'.

Status: Open, Replied, Closed out

To decide the status, the AI also reads the conversation most recent first (your latest replies and theirs, back to the original email), so the latest message counts most.

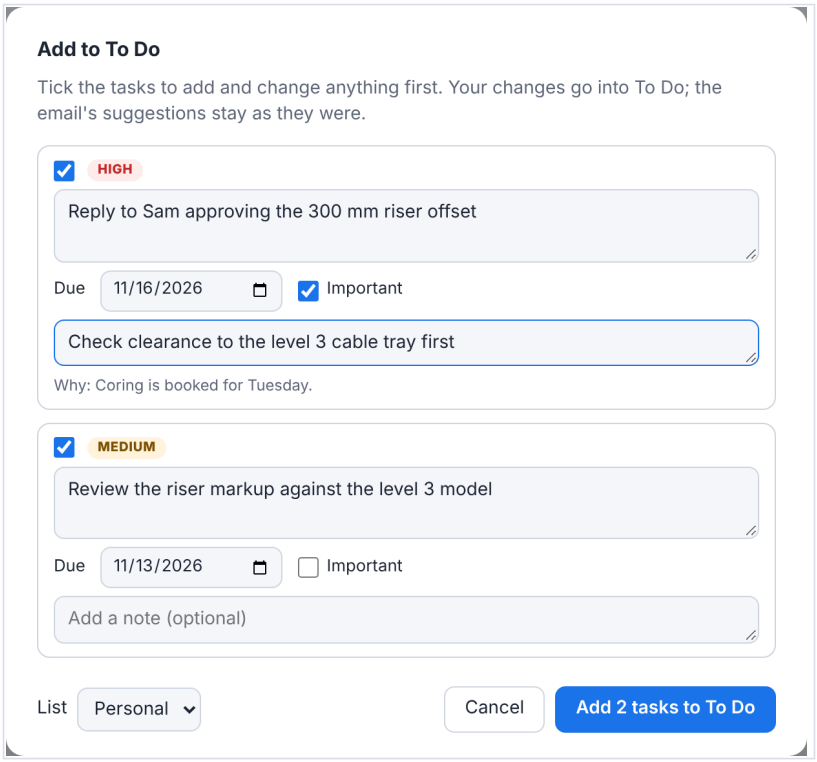
emailbudAI reads your **Sent** mail to work out what has been dealt with. Each received email is marked **Open** (you may still need to act), **Replied** (you answered it) or **Closed out** (the matter is finished).

6. Suggested actions

For any email, click **Recommend actions**. The AI lists what **you** probably need to do, such as 'Reply to Sam approving or rejecting the 300 mm offset', with a priority, a reason and a due date when one is mentioned. Tasks that belong to someone else become 'follow up with them' at most.

Check and edit before adding

Click **Add to To Do**. A window lists every suggested task so you can put it in your own words before it goes into To Do:



Add to To Do: each suggestion can be changed before it is added.

- **Untick** any you don't want; the button counts the ones that will be added.
- Change the **wording**, the **due date** (worked out from phrases such as 'by Monday') and **Important**, and add a **note**. The note goes at the top of the task's notes, above the reason and the link back to the email.
- Choose the **list** at the bottom, then click **Add**. Editing never makes a duplicate.
- A task that's already in To Do shows **In To Do** and starts from the task as it is now (including changes you made in To Do). Change its wording, due date, Important or note and click **Update in To Do**: the task in To Do changes to match, and goes to a linked Microsoft To Do list at the next sync.
- The email's summary shows your wording for each suggestion, marked ✓ **To Do** once it's in To Do.

In the scheduler you can choose **Add new recommended actions to my To-Do list** so this happens automatically for new mail.

7. The To Do list

Click **To Do** at the top. It works like Microsoft To Do and can stay in step with it.

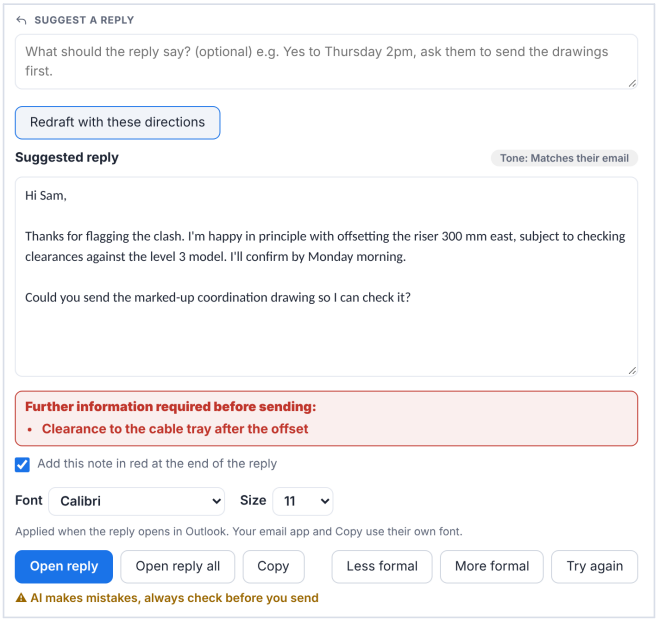
Part	What it does
My lists (left)	Your lists, plus **My Day**, **Important** and **Planned**. New list, Rename and Delete manage them.
Add task	Type a task and press Enter.
Task details	Click a task to edit its title, due date, notes, Important star and My Day.
Open the original email	Tasks made from emails link back to them.
Delete selected	Select several tasks (Ctrl-click, Shift-click, Ctrl+A) and press **DEL**.
Panel dividers	Drag the dividers either side of the task list to resize the lists panel and the task details. Double-click a divider to reset it; sizes are remembered.
Sync	Brings a linked list up to date with Microsoft To Do or Outlook Tasks.

Linking a list to Microsoft To Do or Outlook Tasks

- **Microsoft To Do (online)**: works with any Microsoft account and with new Outlook. Needs the Application (client) ID from chapter 3 with the **Tasks.ReadWrite** permission.
- **Outlook Tasks (classic Outlook on this PC)**: no sign-up; Outlook syncs it to To Do for you. Classic Outlook must be open.

8. Suggesting replies

Under an email's suggested actions, **Suggest a reply** writes a reply with your own AI. The same feature is in the Outlook add-in (chapter 13).



A suggested reply in the main window, with the red list of details the AI could not supply.

1. Optionally type what the reply should say, for example *Yes to Thursday 2pm, ask them to send the drawings first*.
2. Click **Suggest a reply**. A local model can take up to a minute.
3. Edit the draft if you like. **Less formal** and **More formal** rewrite it in a different tone and keep its content; **Try again** writes a fresh one.
4. Choose the **Font** and **Size** for the reply (remembered for next time; the first time, emailbudAI suggests your Outlook reply font when it can read it).
5. Click **Open reply** or **Open reply all**: classic Outlook opens its own reply to that email with the draft at the top, above your signature. With other accounts your default email app opens with the draft filled in. **Copy** puts it on the clipboard.

What the AI is told

- Reply in the email's language, as you (in your role from Settings), to the whole thread it was given. Drafts stop after the last sentence: no 'Kind regards' or name, because your Outlook signature adds those. Each line is typed as a new line, with one empty line between paragraphs and no stray spaces.
- Never invent facts, dates, prices or promises. A missing detail becomes a **[placeholder]**.
- If a proper answer needs technical, specialist or project-specific knowledge it does not reliably have, it lists those subjects. They are shown in a red box and, if **Add this note** is ticked, added in **red bold** at the end of the reply so you remember to fill them in. Delete the note before sending.
- If the thread was longer than the model reads, an amber **Not all of the thread was read** warning appears.
- **AI makes mistakes, always check before you send.** Small local models in particular can state wrong things confidently.

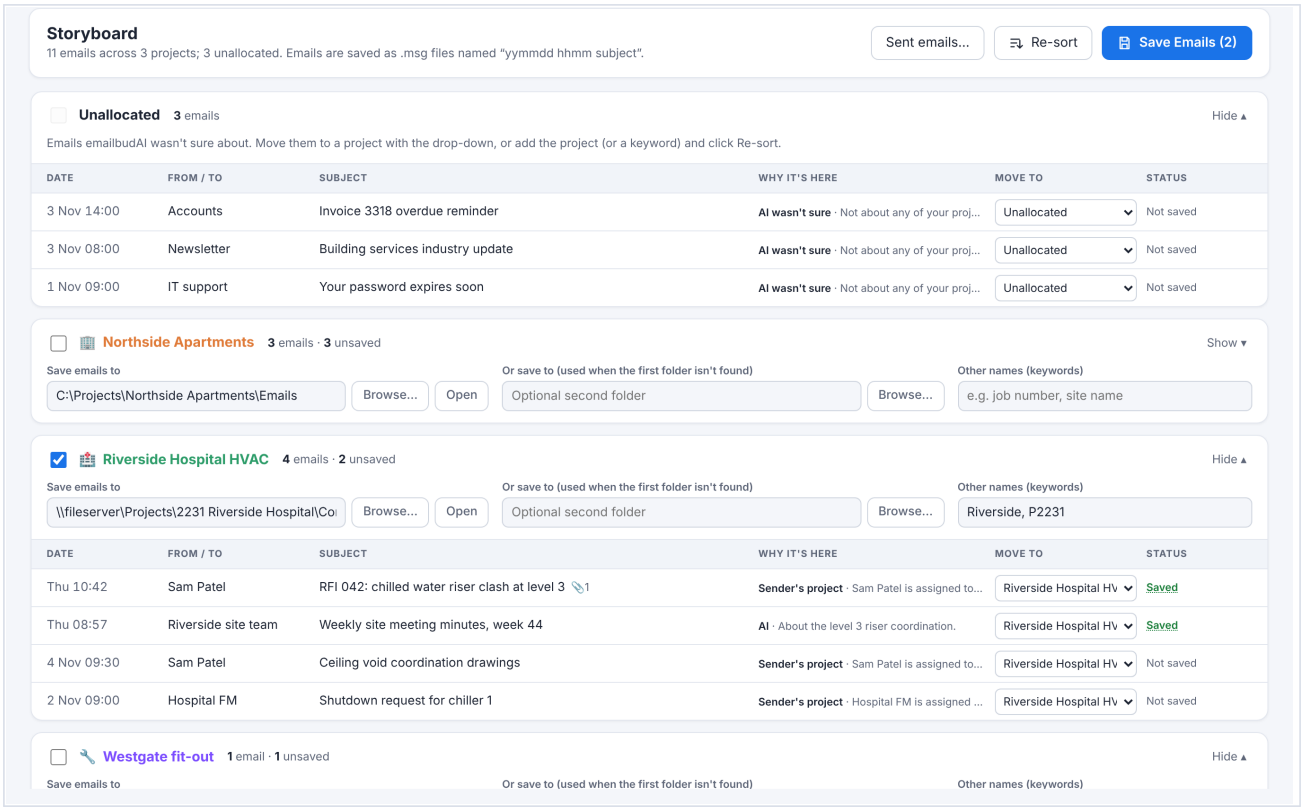
9. Projects, the Storyboard and the project library

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.

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 folder, keywords and emails. Riverside is ticked, so Save Emails (2) will save its 2 unsaved 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.

Moving saved emails out of the Inbox

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.

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.

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.

Your mail	Marking in Outlook
Gmail and other IMAP	Not available: IMAP mail has no Outlook categories, so the option is hidden.

Sent emails: saved automatically, 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 (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.

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.

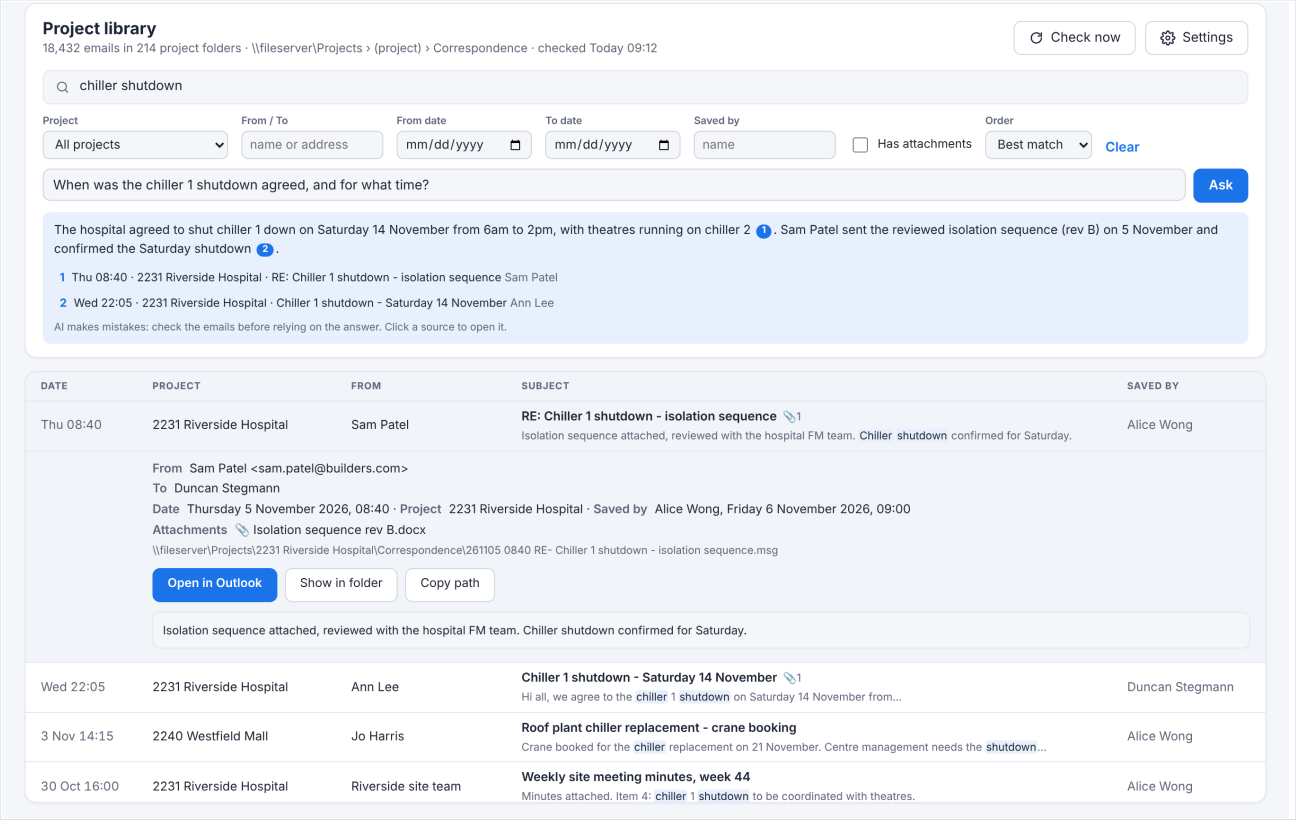
After that, **new replies follow**: when mail is sorted, a new email in a conversation filed to a project goes to that project, marked 'Same conversation', unless its subject names a different project. Before **Save Emails**, emailbudAI also checks for Unallocated emails from the same conversations and 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.

The project library: search everyone's saved emails

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.

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.

Company rollout features (proof of concept)

Four features prepare emailbudAI for use across a company. All four are **off until you turn them on**, and none of them changes anything for colleagues by itself. Try them on one PC first (see **Testing on one PC first** below).

Administrator settings for everyone using a library

In **Library > Settings**, click **Administrator settings for everyone using this library…** Each setting you choose there is locked on every PC that uses the library: the control is greyed out and says 'Set by your administrator'. Leave a setting on **Not set** to let each person choose. The settings are File on Send on or off, **every sent email must be filed** (Outlook holds the email until a project is chosen), whether people may choose 'Don't file this email', when File on Send asks, saving sent emails automatically, marking saved emails in Outlook, which project folders each PC indexes, and the AI engine and model.

They are saved in `<library>\_emailbud\policy.json`. Each PC reads it at most once a minute and keeps a copy, so the settings still apply while the network drive is offline. Each person's own choices are kept underneath and come back if the administrator clears a setting.

> **Note.** In a real rollout, IT should make `policy.json` (or the `_emailbud` folder) writable by administrators only, using Windows folder permissions. Until then, anyone who can change files in the library can change these settings.

Silent install

IT can install emailbudAI without any window, for example from Intune, SCCM or a login script:

```
emailbudAI-Setup.exe --silent --accept-eula --library=\\fileserver\Projects
--model-max=llama3.1:8b --model-source=\\fileserver\emailbud-models
```

Option	What it does
`--silent`	Install with no window (also /silent, /quiet, /S).
`--dir=PATH`	Where to install (default: the same folder the installer window suggests).
`--model=auto`	The default: checks the PC's memory and graphics card and installs the largest AI model it runs well (the same check as the installer window). The log says what it found and chose.
`--model-max=TAG`	The biggest model `auto` may choose, for example `llama3.1:8b`, so powerful PCs don't download a very large model.
`--model=TAG` **or** `--model=none`	A particular AI model for every PC, or none (for example when the company uses an online or shared AI).
`--model-source=PATH`	Copy the AI model from a shared folder instead of downloading it on every PC. Each file is checked while it's copied; if anything is wrong, the model is downloaded instead.
`--startup`	Start emailbudAI (in the tray) when each person signs in to Windows. Off unless given; people can change it in Settings.
`--accept-eula`	**Required.** Accepts the emailbudAI licence agreement for the people who will use the PCs (read it first: www.emailbudai.com/eula.txt).
`--library=PATH`	The project library folder, set for the person on first start (never over a setting they have already made).

Option	What it does
`--updates=MODE`	**notify** (default): emailbudAI says when a new version is out and the person chooses when. **auto**: installed when emailbudAI starts. **held**: no checks or notices; IT installs new versions.
`--desktop`, `--no-start-menu`	Add a desktop shortcut; leave out the Start menu shortcut.
`--log=PATH`	Where the log goes (default `<install folder>\logs\silent-install.log`). Exit code 0 = installed, 1 = failed, 2 = wrong option.

Which model each PC gets. If the library's administrator settings name an AI model, that model is installed on every PC, whatever the command says, and the log warns if a PC is too small for it. If they choose an online AI engine, no local model is installed. Otherwise `--model` decides, and by default each PC gets the largest model it runs well, up to `--model-max`.

The shared model folder is an ordinary Ollama models folder. Make it once on any PC: set the OLLAMA_MODELS environment variable to the shared folder, then run `ollama pull llama3.2` (and any other models PCs may get).

Saving to SharePoint, OneDrive or Teams

A project's save folder can be a SharePoint, OneDrive or Teams folder: open the folder in your browser, copy the address from the address bar and paste it into **Save emails to** (or **Or save to**) on the Storyboard. Save Emails checks with Microsoft that the folder exists (it never creates folders: if it has gone, the emails are flagged **Folder not found**), saves each email on your PC first and then uploads it. A file of the same name is never overwritten; ' (2)' is added. Large emails are uploaded in pieces.

The first time, a message asks you to **Allow…** emailbudAI to save files: it uses the same Microsoft sign-in code as the mail sign-in, with one extra permission (Files.ReadWrite.All: read and write the files you can already open). It needs the Application (client) ID set under More > Mail account. Emails saved to SharePoint aren't searched by the Library.

> **Tip.** A SharePoint library synced to your PC by the OneDrive app is just a folder (for example `C:\Users\you\Company\Projects - Riverside`). Use that folder path instead and none of this is needed.

The search service

Normally every PC builds its own search index of the library. The **search service** builds one index of **every** project folder as a background program, which the Library then searches through. In this proof of concept it runs on **your PC only**: tick **Use a search service for the Library** in Library > Settings. It:

- listens only on this PC (127.0.0.1, port 8766): nothing on the network can reach it;
- needs a random key, kept in your emailbudAI data folder (`library_server.json`), for every request;
- only **reads** the project folders: it writes nothing to the share;
- keeps its own index (`library_server.db`) and log (`library_server.log`), and checks for new emails every 5 minutes;
- starts again when emailbudAI opens; untick the box to stop it. If it stops answering, the Library quietly uses this PC's own index.

A company version would run on the file server, check each person's Windows sign-in and folder permissions, and use HTTPS. That is a later step on the roadmap.

Testing on one PC first

1. Keep the installer of the version you have now (the rollback installer), so you can go back to it.
2. Make a **test library** instead of using the company share, e.g. `C:\emailbud-test\Projects` with two or three project folders holding copies of a few saved emails, and point Library > Settings at it.
3. Administrator settings: choose one or two, check they show 'Set by your administrator', then set them back to Not set (or delete `_emailbud\policy.json` in the test library).
4. SharePoint: use a folder in your own OneDrive, or a test Teams channel you own, not a project site.
5. Search service: tick it, search, ask a question, then untick it.
6. Silent install: try it on a spare PC or a virtual machine, not over your working copy.
7. 'Every sent email must be filed': test only with your own add-in file and your own mailbox.

> **Warning.** Before any of these features touch company folders, mailboxes, SharePoint sites or other people's PCs, check with your IT team.

Rolling back

Run the older installer. It closes emailbudAI (and the search service) and replaces the program; your emails, projects and settings are kept. The new files (`policy_cache.json`, `library_server.*`, `files_token.json`) are ignored by the older version and can be deleted. In Outlook, remove the add-in and add the file the older version saves (chapter 12) so the add-in matches. Delete `_emailbud\policy.json` from any library you tested on.

10. Weekly PDF reports

emailbudAI builds a PDF of the week's minutes: what came in, what is still open, and the open actions grouped by project. Use the **More** menu:

Menu item	Result
Weekly PDF: last full week	One PDF for the previous Monday to Sunday.
Weekly PDF: this week so far	One PDF for the current week to date.
Weekly PDFs, one per project	A separate PDF for every project.

PDFs are saved in `Documents\WeeklyMinutes` unless you choose another folder. The overview is written for you (by name), and emails that were too long to read in full are marked.

11. The scheduler

Open **More > Scheduler...**. The scheduler downloads and summarises for you in the background, even when the window is closed or in the tray.

Setting	What it does
Enable the automatic scheduler	Turns the scheduler on or off.
Run	Every so many minutes or hours, at a set time each day, or on chosen weekdays (24-hour times).
Only start when the computer is idle	Waits until there has been no mouse or keyboard activity for the minutes you set and the processor is quiet. Pauses if you come back.
Emails / Max per run	Which emails to process and an upper limit per run.
Add new recommended actions to my To-Do list	Creates tasks from new email automatically.
Also update this week's weekly PDF	Refreshes the reports after each run.
Run now / Check now / View log	Run immediately; see whether the scheduler is running and why; read its log.

> **Note.** The PC must be on and signed in to Windows for the scheduler to run.

12. Adding emailbudAI to Outlook

The emailbudAI add-in puts the AI summary, suggested tasks and reply drafts in a pane beside your email, inside Outlook. You add it **once**, and it then appears in **classic Outlook, new Outlook and Outlook on the web** for that mailbox, because Outlook keeps add-ins with your mailbox rather than on one PC.

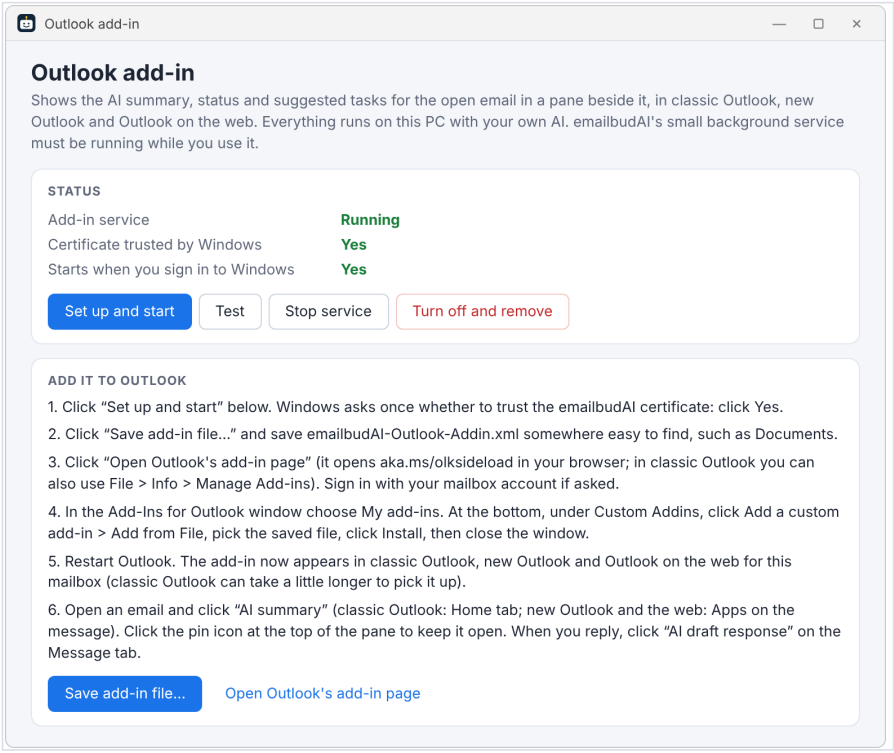
Before you start

You need	Why
A mailbox hosted by Microsoft: Microsoft 365 (work or school), Exchange Online or Outlook.com	Outlook only runs add-ins in Microsoft-hosted mailboxes. With a Gmail or other IMAP account in Outlook, use emailbudAI's main window instead (chapters 4 to 8).
emailbudAI installed and its add-in service running on this PC	The pane is served by emailbudAI on your own PC at `https://localhost:8765`, so your email never leaves it.
The same Windows PC	The add-in works in Outlook on **this** PC (any of the three Outlooks). Outlook on your phone or another computer cannot reach it.
For Outlook on the web: Microsoft Edge or Google Chrome	They trust the emailbudAI certificate that Windows trusts.

The steps are the same for all three Outlooks, because Microsoft installs custom add-ins through one window called **Add-Ins for Outlook**. Only the way you open that window differs (step 3).

Step 1: start the add-in service in emailbudAI

1. In emailbudAI choose **More > Outlook add-in...**
2. Click **Set up and start**. Windows asks once whether to trust the **emailbudAI Local CA** certificate; click **Yes**. It only covers `https://localhost` on this PC.
3. The Status box should show **Running**, **Yes** and **Yes**. Click **Test** if anything says No.



emailbudAI's Outlook add-in window, with the service running.

Step 2: save the add-in file

In the same window click **Save add-in file...** and save `emailbudAI-Outlook-Addin.xml` somewhere easy to find, such as **Documents**. This small file tells Outlook where the pane lives and which buttons to add.

> **Note.** Save a **fresh** file whenever the reading pane says your add-in file is out of date (after some emailbudAI updates). Outlook keeps the file it was given and never fetches a new one by itself.

Step 3: open the Add-Ins for Outlook window

Use whichever of these suits you; they all open the same window. Sign in with your mailbox account if asked.

From classic Outlook

1. Click **File** (top left).
2. On the **Info** page click **Manage Add-ins**. Your browser opens Outlook on the web and, after a few seconds, the **Add-Ins for Outlook** window.

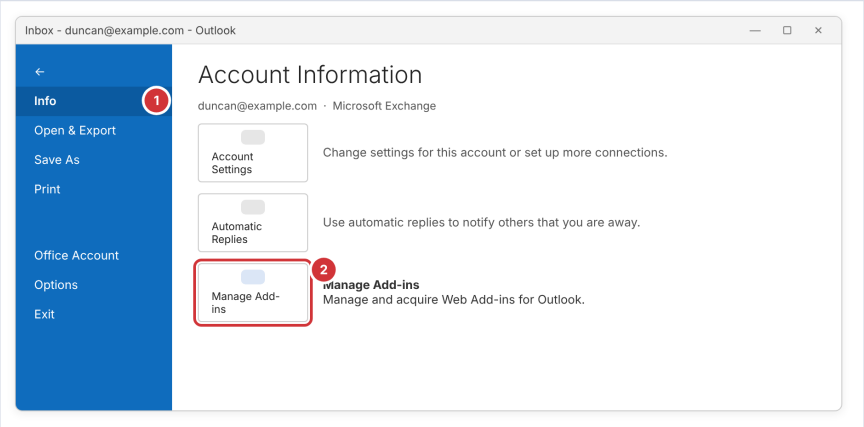


Illustration (simplified; your Outlook may look a little different). Classic Outlook: File > Info > Manage Add-ins.

From new Outlook, Outlook on the web, or any browser

1. In emailbudAI's add-in window click **Open Outlook's add-in page**, or open your web browser (Edge or Chrome) and go to `https://aka.ms/olksideload`.
2. Outlook on the web opens, then the **Add-Ins for Outlook** window appears after a few seconds.

> **Note. If Outlook opens but the Add-Ins window doesn't:** this is a known, intermittent Microsoft fault: the short link passes through several redirects and sometimes loses the part that opens the window, mostly while Outlook is signing you in. Click **Open Outlook's add-in page** again (or reload the aka.ms link): once you're signed in it normally appears. In classic Outlook, File > Info > Manage Add-ins is another way in.

> **Tip.** New Outlook's **Apps > Add apps** store cannot install add-ins from a file yet, which is why the link above is used for new Outlook too.

Step 4: add the file

1. In the **Add-Ins for Outlook** window, choose **My add-ins** on the left.
2. Scroll to **Custom Addins** at the bottom and click **Add a custom add-in**.
3. Choose **Add from File...** (*Add from URL* is no longer offered by Outlook).

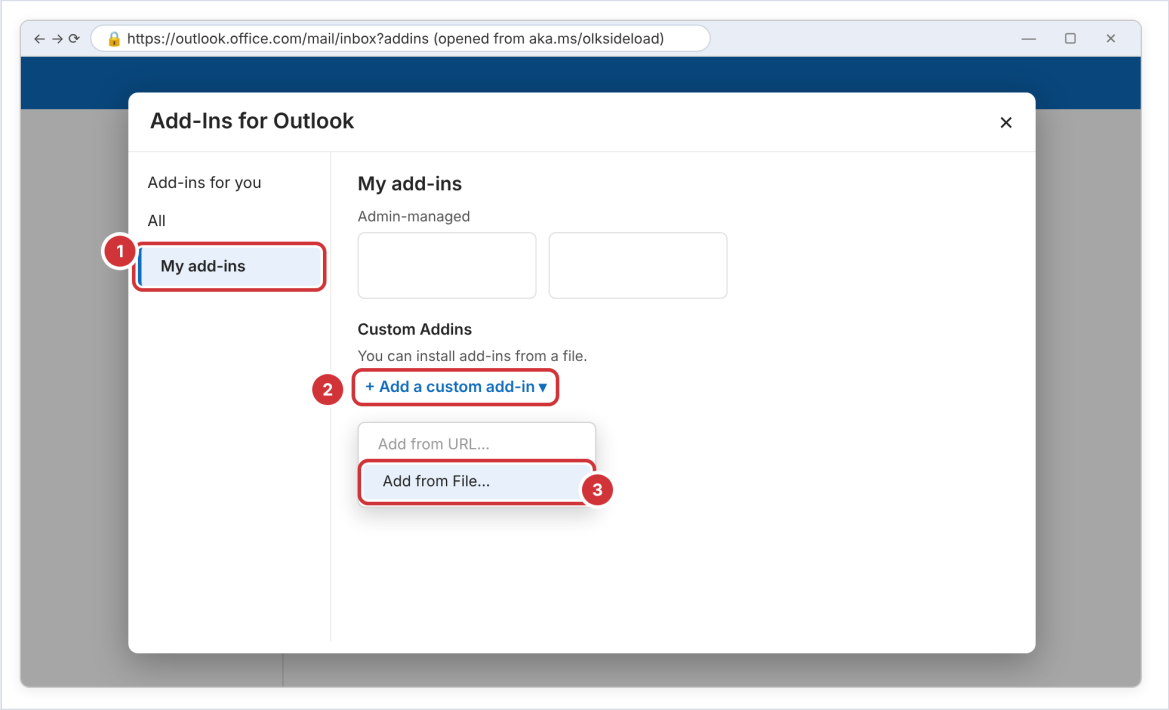


Illustration (simplified; your Outlook may look a little different). The Add-Ins for Outlook window: 1 My add-ins, 2 Add a custom add-in, 3 Add from File.

1. Pick `emailbudAI-Outlook-Addin.xml` from where you saved it in step 2, and click **Open**.
2. Outlook warns that the add-in is not from the store. Click **Install**. (It is your own emailbudAI on this PC.)
3. emailbudAI now appears under Custom Addins. Close the window.

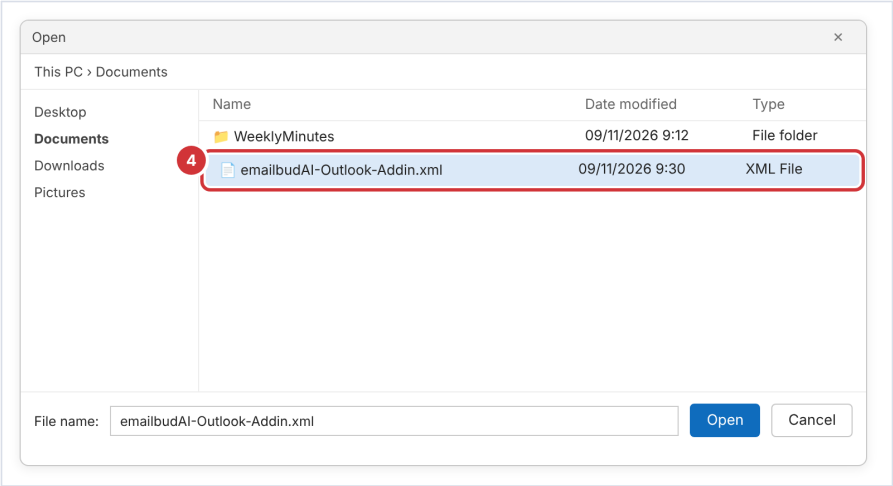


Illustration (simplified; your Outlook may look a little different). 4: choose the saved add-in file.

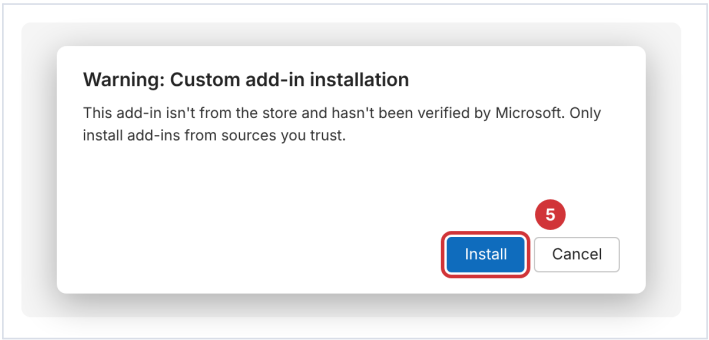


Illustration (simplified; your Outlook may look a little different). 5: confirm with Install.

Step 5: restart Outlook and find emailbudAI

Close and reopen Outlook (in a browser, refresh the page). Classic Outlook can take a while to pick up a newly added add-in: Microsoft says up to 24 hours, though it is usually quicker after a restart.

> **Tip.** You don't have to keep checking. After you save the add-in file, emailbudAI watches classic Outlook's add-in cache on this PC and shows a **Windows notification** ("emailbudAI is now in classic Outlook") as soon as that version arrives. The add-in window's **In classic Outlook on this PC** line shows the same. It needs the add-in service running, and stops watching after a week.

Classic Outlook

1. Select an email.
2. On the **Home** tab click **AI summary** (or **To Do**, chapter 13) in the emailbudAI group. If you don't see it, click **All Apps** (or **...** on a simplified ribbon) and choose emailbudAI.
3. Click the **pin** at the top right of the pane once, so it stays open and updates for every email you select.

> **Note.** Classic Outlook only shows add-ins when the **Reading Pane** is on the right or at the bottom (View > Reading Pane).

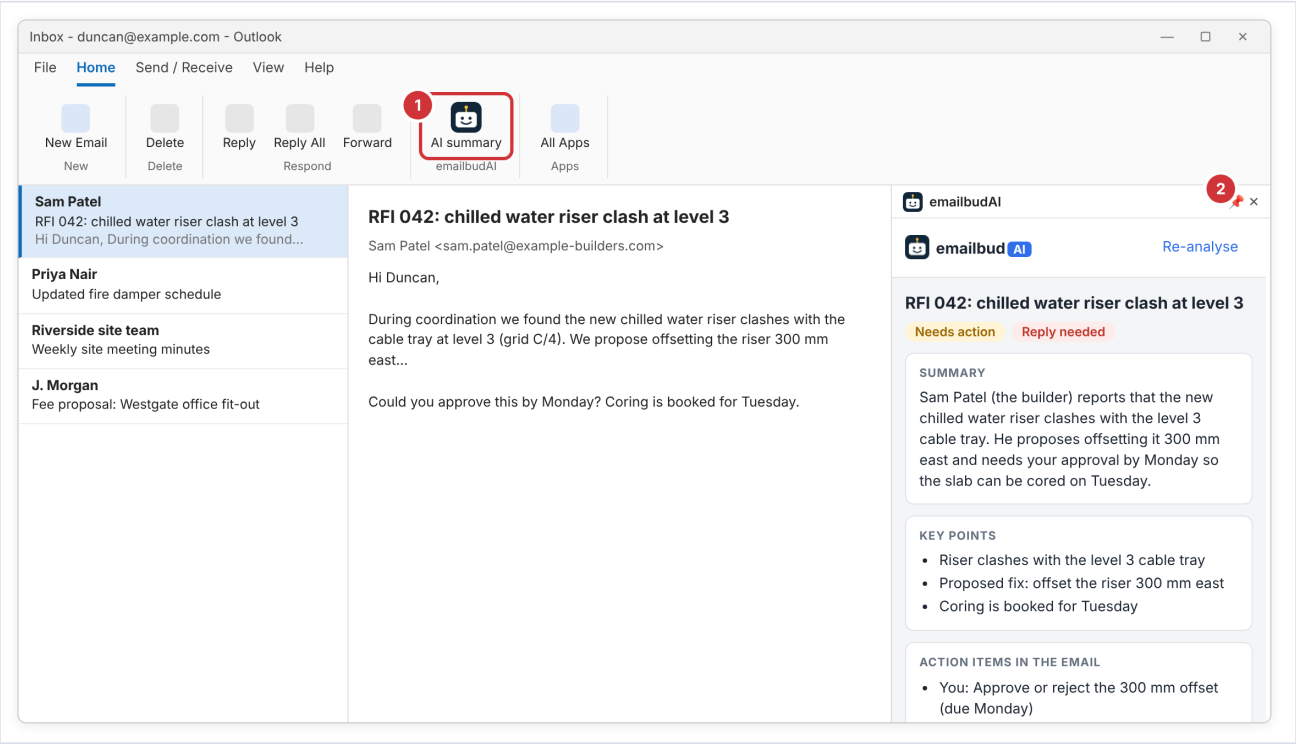


Illustration (simplified; your Outlook may look a little different). Classic Outlook: 1 AI summary on the Home tab, 2 the pin that keeps the pane open.

New Outlook

1. Select an email.
2. Click **Apps** in the email's action bar (or **More apps** on the ribbon) and choose **emailbudAI**.
3. Pin the pane. Tip: to put emailbudAI on the ribbon, open **More apps**, right-click emailbudAI and choose **Pin**.

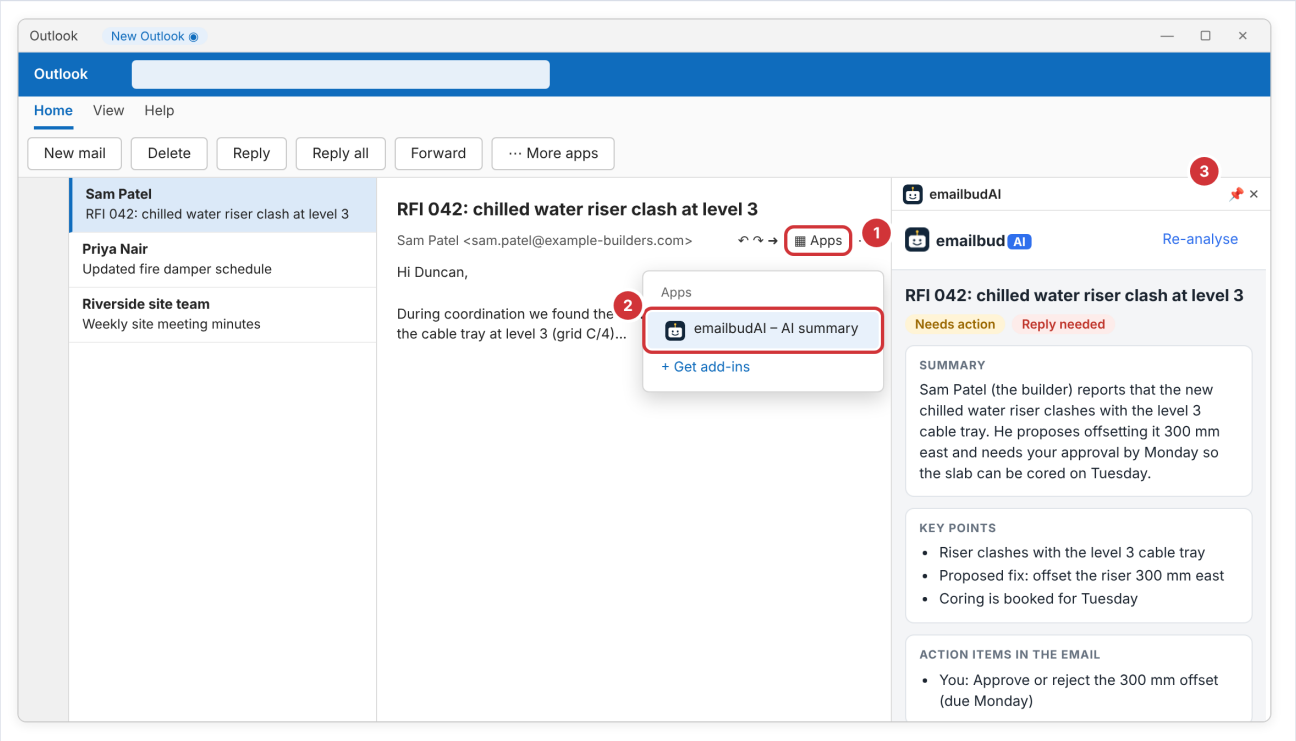


Illustration (simplified; your Outlook may look a little different). New Outlook: 1 Apps, 2 emailbudAI, 3 the pin.

Outlook on the web

Outlook on the web works exactly like new Outlook: select an email, click **Apps** (or **More apps**), choose **emailbudAI** and pin the pane. Use it on the PC where emailbudAI runs.

> **Note.** Pane won't load in the browser? Chapter 17, section F has the one-off Edge, Chrome and Firefox setting.

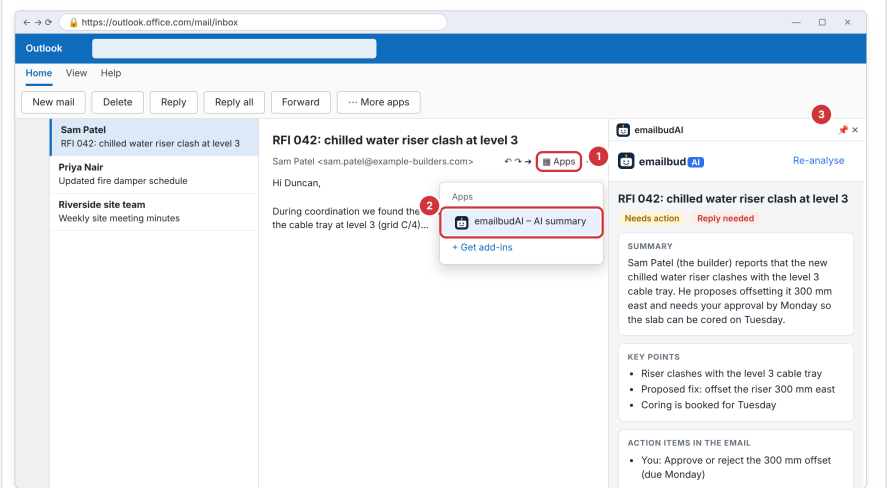


Illustration (simplified; your Outlook may look a little different). Outlook on the web in a browser: the same Apps button and pane.

Updating or removing the add-in

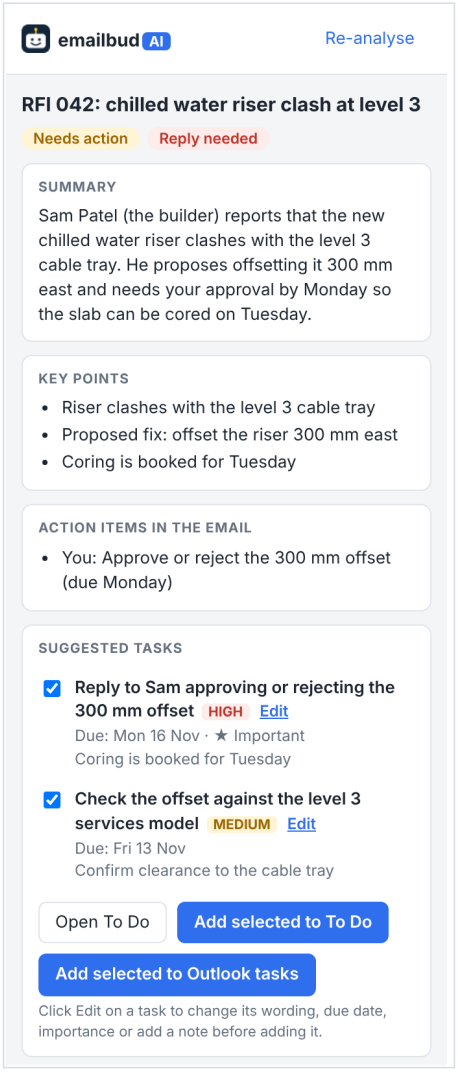
- **Add-in file version 4** (this version) adds the **File to project** button in the reply window and the File on Send check in new Outlook. Very old classic Outlook versions (before 2022) don't support it and won't offer pinning the pane.
- **When the pane says your add-in file is older** (a yellow note at the top of the pane, sometimes with an old name such as mAIlmate as the pane title): save a fresh file (step 2), open Add-Ins for Outlook (step 3), remove emailbudAI, add the new file (step 4) and restart Outlook.

- **To remove it**: open Add-Ins for Outlook, go to My add-ins > Custom Addins, click the **...** on emailbudAI and choose **Remove**. To stop the service as well, use **Turn off and remove** in emailbudAI's add-in window.

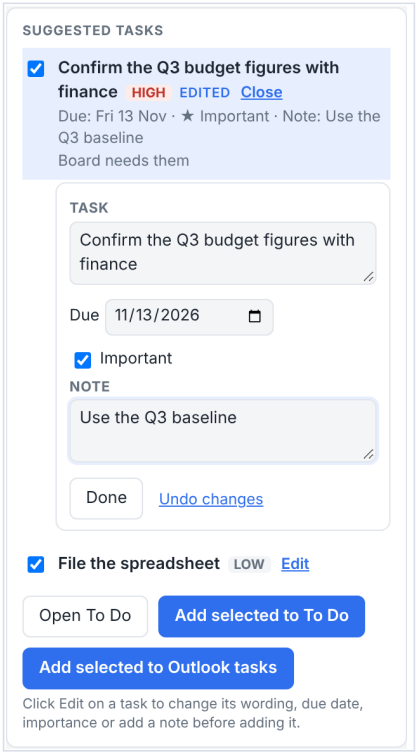
13. Using emailbudAI in Outlook

While reading an email

The pane shows the subject, status chips, the AI summary, key points, the action items in the email (yours marked "You") and the **suggested tasks**. It updates when you select another email, as long as it is pinned.



The reading pane (sample email).

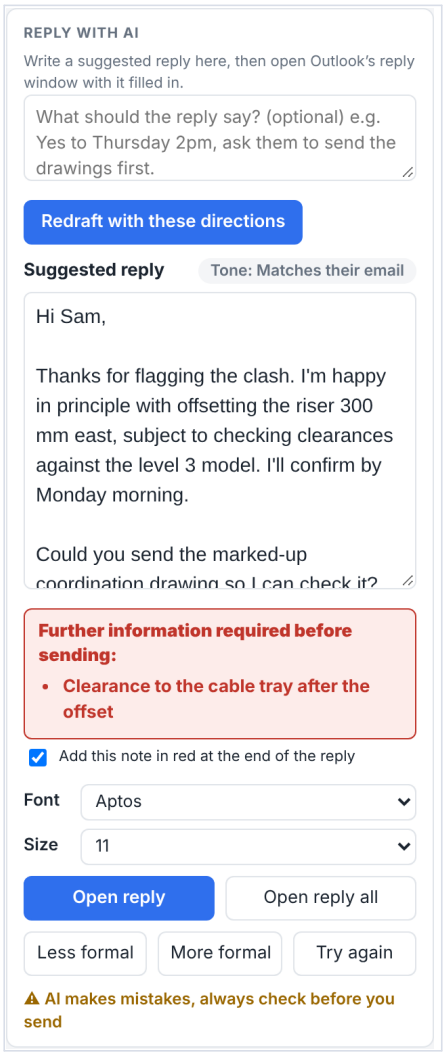


Editing a suggested task in the pane before adding it.

- Tick suggested tasks and click **Add selected to To Do** (they go to your default To Do list), or **Add selected to Outlook tasks** to create them in Outlook (Microsoft To Do when signed in, otherwise classic Outlook's Tasks). A task is never created twice.
- **Open To Do** switches the pane to your To Do list; **AI summary** at the top of the To Do pane switches back.
- **Edit** next to a task opens it for changes first: the wording, the due date, Important and a note. Edited tasks are marked **EDITED** and keep your changes until you add them (**Undo changes** puts the AI's version back).
- For a task that's already in To Do, **Edit** starts from the task as it is now; change it and click **Update in To Do** to change the task there. (Tasks sent straight to Outlook with Add selected to Outlook tasks aren't changed: edit those in Outlook.)
- **Re-analyse** redoes the summary, for example after you set your name in Settings.
- Untick **Analyse each email I open** at the bottom if you'd rather click Summarise yourself.
- Emails you open in Outlook are also saved in emailbudAI's archive, so they appear in the main window.

Reply with AI (from the reading pane)

At the bottom of the reading pane, **Reply with AI** drafts a reply before you even click Reply. It works with any version of the add-in file.



Reply with AI: the draft, the red list of details to fill in, font and size, and the buttons.

1. Optionally type what the reply should say, then click **Draft a reply**.
2. Adjust it with **Less formal**, **More formal** or **Try again**, and edit it in the box.
3. Choose the **Font** and **Size** (remembered for next time).
4. Click **Open reply** or **Open reply all**. Outlook's reply window opens with the draft in it, and the red note at the end if ticked.

AI draft response (inside the reply window)

When you click Reply yourself, Outlook closes the reading pane (Outlook does not let add-ins follow you into the reply). Click **AI draft response** on the reply's **Message** tab (new Outlook and the web: the Message tab, or **Apps**) to open emailbudAI's reply drafter.

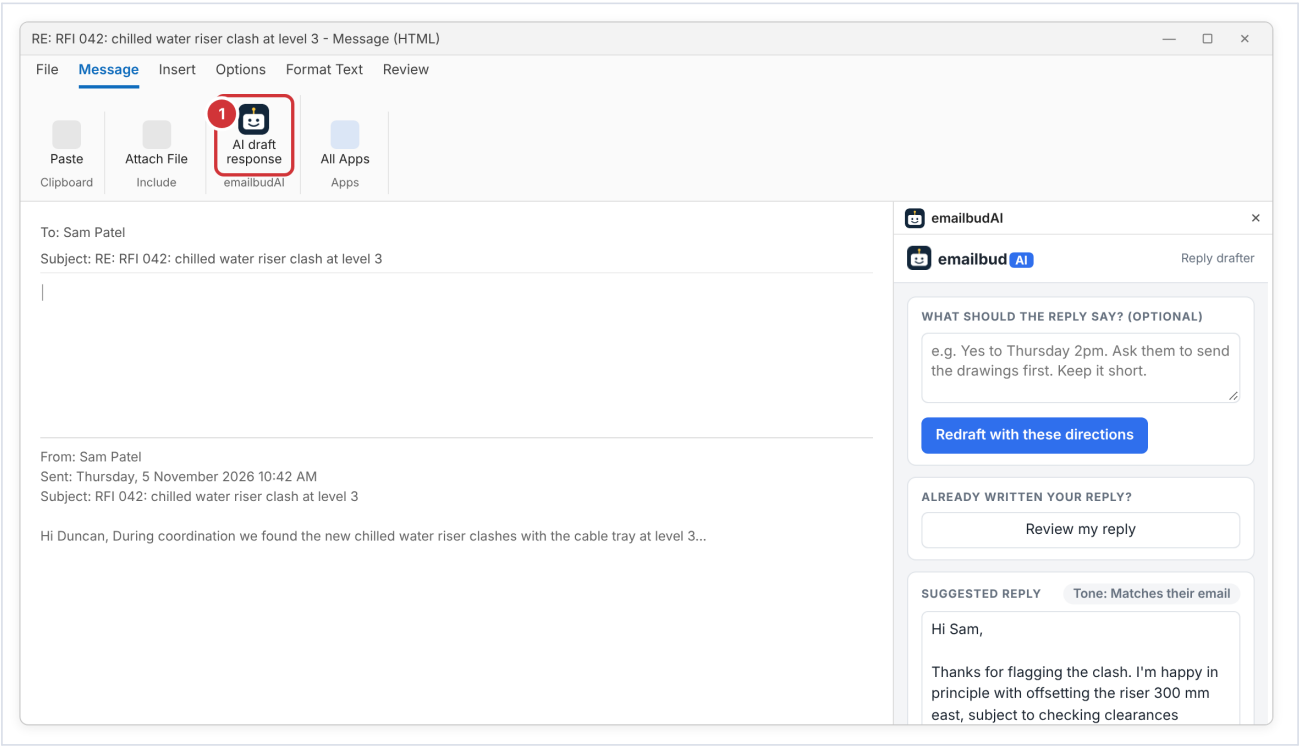


Illustration (simplified; your Outlook may look a little different). Classic Outlook reply window: 1 AI draft response on the Message tab opens the drafter.

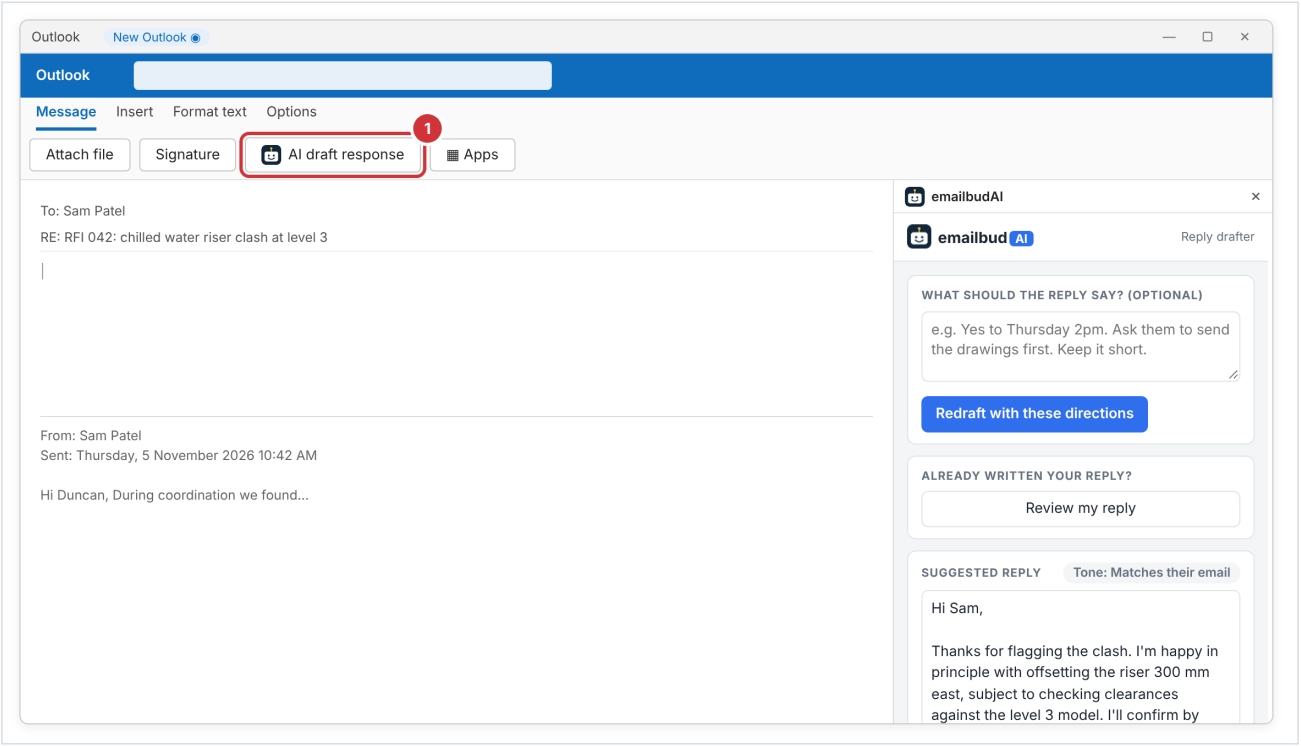
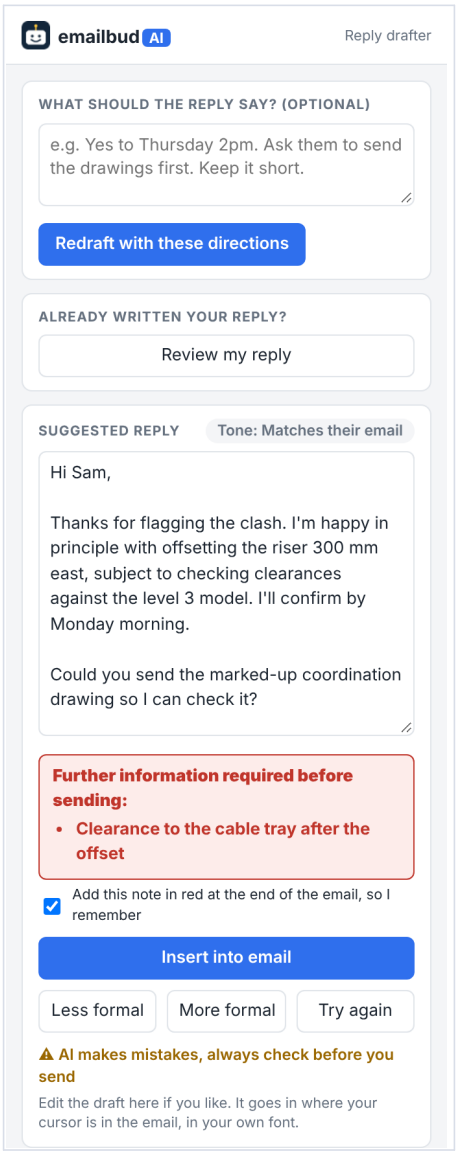


Illustration (simplified; your Outlook may look a little different). New Outlook and Outlook on the web: the same button on the Message tab.

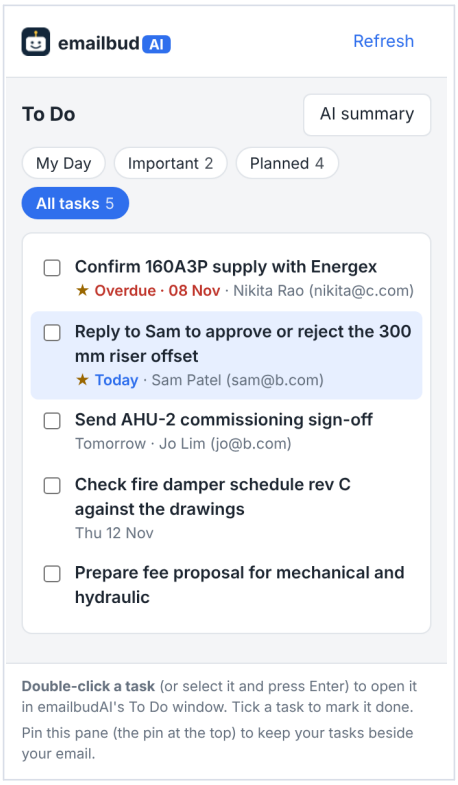


The reply drafter.

- It drafts as soon as it opens (untick **Write a draft as soon as this opens** to type directions first).
- **Insert into email** types the draft where your cursor is, so it takes on **your own font**. Ctrl+Z in the email undoes it. To swap in a new version, undo the old one first.
- **Review my reply**: if you wrote the reply yourself, the AI reads it (not the quoted thread or your signature), gives an overall comment and up to six suggestions, and offers an improved version you can insert.
- The red list, the 'not all of the thread was read' warning and **AI makes mistakes, always check before you send** work as in chapter 8.

The To Do pane

Your emailbudAI To Do tasks can sit beside your email in their own pane. Select any email and click **To Do** in the emailbudAI group (classic Outlook: the Home tab; new Outlook and the web: **Apps** > emailbudAI > To Do), or click **Open To Do** under Suggested tasks in the summary pane. Pin the pane to keep it open.



The To Do pane (sample tasks), with one task selected.

- **Double-click a task** (or select it and press **Enter**) to open emailbudAI's To Do window on that task, ready to edit. If emailbudAI isn't open it starts; if it is, it comes to the front.
- **AI summary** (beside the To Do title) switches the pane back to emailbudAI's summary of the selected email.
- Switch between **My Day**, **Important**, **Planned** and **All tasks** (remembered). Tasks are grouped by project; overdue dates are red.
- **Tick** a task to mark it done. A linked Microsoft To Do list picks the change up the next time emailbudAI syncs.
- The list refreshes every minute and whenever the pane is shown; **Refresh** does it now.

> **Note.** Outlook shows one emailbudAI pane at a time: **AI summary** and **To Do** (on the ribbon, or the buttons inside the pane) swap between the email's summary and your To Do list. The To Do button arrived with add-in file version 3; if you don't see it, the pane shows a yellow note asking you to add the new add-in file (chapter 12, Updating or removing the add-in).

Making the panes easier to read

Each emailbudAI pane in Outlook (AI summary, To Do, AI draft response, File to project) has a **View** button (two A's) at the top right:

- **Text size**: **A**– and **A+** make the pane's text smaller or bigger (80% to 175%).
- **Font**: the pane's font (Segoe UI, Aptos, Calibri, Arial, Verdana, Tahoma, Georgia or Cambria). The reply's own font is set separately, under Reply with AI.
- **Hide a section**: click its heading (for example SUMMARY or SUGGESTED TASKS); click again to show it. **Show all sections** brings them all back.

- **Resize a section**: drag the small bar under it up or down; double-click the bar to go back to normal. **Reset section sizes** does all of them.
- **Reset view** puts everything back. Each pane remembers its own settings on this PC. The pane's width is Outlook's: drag the pane's left edge.

The background service

The add-in service (`emailbudAI.exe --addin`) must be running for the pane to work. It starts with Windows once set up. Use **Stop service** or **Turn off and remove** in emailbudAI's add-in window to stop it. Its log is `addin.log` in your emailbudAI data folder.

> **Privacy.** The pane is served from your own PC (`https://localhost`) and the AI runs on your PC. Outlook sends the email to the pane inside your PC only; nothing goes to Microsoft or to an online AI unless you chose the Claude option.

14. Settings, storage and themes

Open **Settings** with the gear at the top right. Changes apply when you click **Apply**.

About you

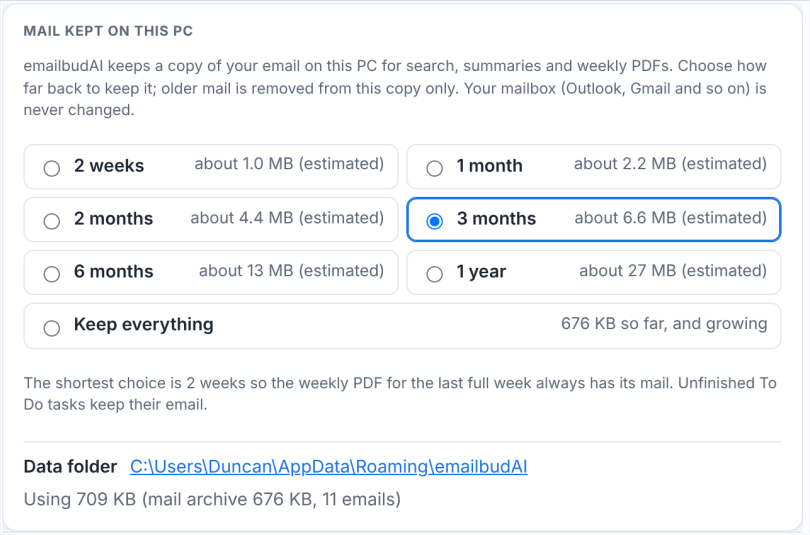
First name, surname and (optionally) your role. Every analysis is then told who you are, so the AI:

- recognises your name, surname, 'Mr/Ms/Dr Surname' and 'you' in emails as you;
- writes summaries in the first person when they mention you: 'Kate asked me to send the riser schedule by Friday', not 'Kate asked Duncan…';
- notices whether you are asked to do something directly or are only copied in;
- lists your own action items as "You" and suggests actions from your point of view and in your role;
- signs replies with your name and writes them as someone in your role would.

Emails analysed before you set this keep their old summaries until you click Summarise or Recommend actions (or Re-analyse in Outlook).

Mail kept on this PC

emailbudAI keeps a copy of your email for search, summaries and weekly PDFs. Choose how far back to keep it; each choice shows roughly how big the archive would be (measured from your own mail, or estimated when you have not stored that much yet).



Mail kept on this PC, with the estimated size of each choice and the data folder.

- Choices: 2 weeks, 1 month, 2, 3 or 6 months, 1 year, or Keep everything. The shortest is 2 weeks so the weekly PDF for the last full week always has its mail.
- Older mail is removed from **emailbudAI's copy only**, after each download and when you apply a shorter period, and the file is compacted to free the space. **Your mailbox is never changed.** An amber note tells you how many emails a shorter period will remove before you apply it.
- Emails linked to unfinished To Do tasks are always kept. Downloads never go further back than the period you keep.
- New installs keep 3 months. Installs from before this option keep everything until you choose.
- **Data folder**: the link opens it in File Explorer, followed by the space used. The same figure is at the bottom right of the main window.

The status bar: click Data to open the data folder.

Text, look and tray

- **Text**: the font and size of the window.
- **Look**: dark theme, and the modern window (untick to use the classic window).
- **System tray**: choose whether minimise and/or close (X) send emailbudAI to the tray. Scheduled work keeps running; click the tray icon to reopen it.
- **Starting with Windows**: tick **Start emailbudAI when I sign in to Windows** and it opens quietly in the tray each time you sign in, so the scheduler, summaries and update notices run without you opening it. It's listed in Windows **Settings > Apps > Startup** (and Task Manager's Startup apps) as emailbudAI, where it can be switched off too; if it was, Settings says so, and ticking the box switches it back on. The installer offers the same choice.

15. Your data, backups and privacy

Item	Where
Emails, summaries, projects, To Do tasks, settings, logs	%APPDATA%\emailbudAI (mail.db, config.json, scheduler.log, addin.log and others). Settings > Storage shows the folder, its size and a link to open it.
Backups	To back up, close emailbudAI (and stop the scheduler) and copy the %APPDATA%\emailbudAI folder somewhere safe. Copy it back to restore.
Saved mail passwords	Windows Credential Manager, under **emailbudAI** (only if you tick Remember password).
Program files and installer logs	Your install folder (chapter 2).
Weekly PDFs	Documents\WeeklyMinutes unless you chose another folder.

Privacy. With the default Ollama engine, your email text never leaves your PC. Access to Microsoft mail is read-only (Mail.Read). The add-in's certificate only covers https://localhost on this PC. Only if you choose the Claude API option is email text sent to that online service.

Note. Upgrading from an older version: earlier versions kept your data in %APPDATA%\EmailManager. The first time this version starts, it moves that folder to %APPDATA%\emailbudAI with everything in it, so nothing is lost. If an older copy is still running at that moment, emailbudAI keeps using the old folder and moves it at the next start. Saved passwords move from the EmailManager entries to emailbudAI entries in Credential Manager as they are used, and older To Do links (emailmanager://) still open the email.

To start again from scratch, close emailbudAI and rename the %APPDATA%\emailbudAI folder. emailbudAI creates a new one at the next start; rename the old one back to restore your data.

16. Quick reference

Keyboard

Keys	Action
Esc	Cancel whatever is running.
Ctrl+F	Search your email.
Ctrl-click / Shift-click / Ctrl+A (To Do)	Select several tasks / a range / all tasks.
DEL (To Do)	Delete the selected tasks (ignored while typing in a box).

Where to find things

I want to...	Go to
Tell the AI who I am	Settings > About you
Change how much mail is kept	Settings > Mail kept on this PC
Open the data folder	Data (bottom right) or Settings > Mail kept on this PC
Change my mail account or AI model	More > Mail account...
Suggest a reply to an email	Select it > Suggest a reply
Run summaries automatically	More > Scheduler...
Make a weekly report	More > Weekly PDF...
File emails into project folders	Storyboard tab > tick projects > Save Emails (chapter 9)
Search everyone's saved emails	Library tab (chapter 9)
Add emailbudAI to Outlook	More > Outlook add-in... then chapter 12
Open Add-Ins for Outlook	aka.ms/olksideload, or classic Outlook: File > Info > Manage Add-ins
Check for a new version	More > Check for updates...
Remove the program	Windows Settings > Apps > Installed apps > emailbudAI

17. Troubleshooting

Find the heading that matches what you see. Each table gives the likely cause and what to do. If you are still stuck, use the checklist at the end of this chapter, then ask for help.

Asking for help

1. Click **Help** at the top right of the window (or **Get help** on the sign-in screen if you can't sign in).
2. Say what you were doing and what went wrong. Leave **Include emailbudAI's logs** ticked: they show what happened. Click **See exactly what's sent** to check first: email addresses, passwords and keys are blanked out, and no email content is sent.
3. Click **Send**. You see the case number (e.g. HELP-00042) and get an email confirming it. Replies come by email; reply to them to add detail. Your cases and their answers are also on **emailbudai.com/help**.

> **Tip.** No internet? The report is saved as a text file instead, so you can attach it to an email. Ideas and bugs others may share are welcome on the forum at **emailbudai.com/forum**, where everyone can vote and reply.

A. Installing

What you see	Why it happens	What to do
Windows says 'Windows protected your PC'	The installer is not code-signed, so SmartScreen warns about any new program.	Click **More info**, then **Run anyway**.
The Install button is greyed out	Not enough free space, or the AI limits box is not ticked.	Tick **I understand and accept these limitations**. If space is short, free some up or click **Browse...** for another drive.
'That folder can't be used'	Network drives, Program Files, the Windows folder and very long paths are refused.	Choose a folder on a local drive, or keep the default.
A download fails or stalls	Internet drop, antivirus, or a company proxy.	Press **Try again**: downloads resume. Allow emailbudAISetup.exe in your antivirus. On a company network ask IT to allow python.org, ollama.com and github.com.
'Python's installer finished but did not create a Python here'	An older copy of the same Python version is still registered in Windows (often left by an earlier mAIlmate install).	Run the latest installer: it clears the old registration or unpacks Python directly. If it still fails, uninstall every 'Python 3.12' entry in Installed apps, restart, and run the installer again.
'No Python at ...\Python\pythonw.exe' when emailbudAI starts	emailbudAI's private Python was removed (for example by an older upgrade).	Run the installer again into the same folder. It rebuilds the Python environment and keeps your data.
The recommended model is smaller than I expected	Built-in graphics' shared memory is ignored, so the AI runs on the processor.	That is deliberate. You can still pick a bigger model; it will be marked slow.

B. Connecting to your mail

What you see	Why it happens	What to do
'Classic Outlook isn't available on this PC'	You have only new Outlook (or no Outlook).	Choose **Microsoft 365 / Outlook.com / Exchange Online** (works with new Outlook) or **IMAP**.
'Couldn't read from Outlook' / 'Server execution failed'	Classic Outlook is not running, is stuck on a prompt, or runs at a different permission level.	Close Outlook fully, start it normally (not as administrator), wait for your mail to load, then click Refresh mail.
Microsoft sign-in: 'Admin consent required'	Your organisation requires an administrator to approve the app registration.	Ask IT to grant consent for Mail.Read (and Tasks.ReadWrite), or use IMAP.
Microsoft sign-in fails or the code is rejected	Public client flows are off, or the code expired.	In Entra set **Allow public client flows** to **Yes**, then sign in again and enter the new code promptly.
Double-click: 'Email not found in Outlook'	The email was deleted permanently, moved to an archive or another mailbox, or Outlook cleaned it up. emailbudAI searched your mailbox's folders (and Deleted Items) first.	Search Outlook for the subject shown in the message. Click Refresh mail so emailbudAI's list matches your mailbox.
Double-click: 'Outlook is busy' or 'Can't connect to Outlook'	Outlook is showing a dialog or still starting, or one of Outlook and emailbudAI was started as administrator.	Close Outlook's dialog or wait, then try again. Start both the normal way. Microsoft 365: if asked, sign in again under More > Mail account.
Double-click on an IMAP (e.g. Gmail) email: 'Outlook doesn't have this email'	Outlook can only open it when that account is also set up in classic Outlook.	Add the account to classic Outlook, or open the email in the account's own app or website.
IMAP: 'login failed'	Your normal password is refused; the provider needs an app password; or IMAP is disabled.	Create an **app password** and make sure IMAP is enabled.
Old emails have disappeared from emailbudAI	Settings > Mail kept on this PC removes older mail from emailbudAI's copy.	Choose a longer period and click Refresh mail. Your mailbox itself was never changed.

C. The AI, summaries and replies

What you see	Why it happens	What to do
'Couldn't reach Ollama'	Ollama is not running, or the server address is wrong.	Start Ollama from the Start menu (it runs in the tray), or restart the PC. Server address should be `http://localhost:11434`.
'Model not found'	The chosen model is not downloaded.	Open More > Mail account, click **Check** and pick an installed model, or run `ollama pull llama3.2`.
Summaries are very slow	A big model for this PC, or other programs using memory.	Close other programs, or choose a smaller model. Use the scheduler's idle option so work happens while you are away.
'Not all of this email was read'	The email or thread is longer than the model reads (chapter 5).	Check the older messages yourself, or choose a larger model, which reads more.

What you see	Why it happens	What to do
Tasks are not written for me / replies address the wrong person	About you is empty, or the summary was made before you filled it in.	Fill in Settings > About you, then click Summarise / Recommend actions again (Re-analyse in Outlook).
Summaries or replies are poor or wrong	Small models make mistakes, especially with long or technical threads.	Always check before you send. Try a larger model if your PC can run it.

D. Adding the add-in to Outlook

What you see	Why it happens	What to do
Outlook opens but the Add-Ins for Outlook window doesn't	A known, intermittent Microsoft fault: the link's redirects lose the part that opens the window, mostly while signing in.	Click **Open Outlook's add-in page** again; once you're signed in it normally appears. Classic Outlook: File > Info > Manage Add-ins.
I can't find where to add a custom add-in	Outlook's store (Apps > Add apps, All Apps) can't install from a file.	Go to `https://aka.ms/olksideload` in Edge or Chrome, or in classic Outlook File > Info > Manage Add-ins (chapter 12, step 3).
There is no 'Add from URL'	Microsoft removed that option.	Use **Add from File** with the saved `emailbudAI-Outlook-Addin.xml`.
'Not a valid add-in' or the file is refused	Wrong file, or it was added under COM Add-ins.	Use the .xml file saved by emailbudAI, through Add-Ins for Outlook > My add-ins > Custom Addins. COM Add-ins (File > Options > Add-ins) is not for this.
Custom add-ins can't be added at all	Your organisation has turned off custom add-ins, or the mailbox is not hosted by Microsoft (for example Gmail through IMAP).	Ask IT whether users may install custom add-ins. With a non-Microsoft mailbox, use emailbudAI's main window.
Added, but no emailbudAI button in classic Outlook	Classic Outlook caches add-ins; or the Reading Pane is off.	Restart Outlook (Microsoft says it can take up to 24 hours). Turn on View > Reading Pane (Right or Bottom). Look under All Apps.
No button in new Outlook or on the web	It is under Apps / More apps.	Select an email and click **Apps** in its action bar. Pin it to the ribbon from More apps if you like.

E. Using the add-in

What you see	Why it happens	What to do
The pane won't load in Outlook on the web (blank, spinning or an add-in error) but works in classic Outlook	The browser blocks web pages from reaching your PC (Local Network Access).	See section F below for Edge, Chrome and Firefox.
The pane is blank or says it cannot reach emailbudAI	The add-in service is not running, or the certificate was not trusted.	In emailbudAI open More > Outlook add-in and click **Test**, then **Set up and start** and accept the certificate prompt. In a browser use Edge or Chrome on the same PC.

What you see	Why it happens	What to do
A yellow note says Outlook is using an older add-in file	The add-in changed (for example the reply-window button was added) and Outlook still has the old file.	Save a fresh add-in file, remove emailbudAI in Add-Ins for Outlook, add the new file and restart Outlook (chapter 12).
The pane title shows an old name (mAIlmate, mAIlwright)	Outlook takes the title from the add-in file it was given.	Re-add a freshly saved file as above.
The pane disappears when I click Reply	Outlook closes reading-mode panes when you start writing.	Draft first with **Reply with AI** and click Open reply, or click **AI draft response** on the reply's Message tab.
There is no AI draft response button when replying	Your add-in file is older than this feature.	Re-add a freshly saved file (chapter 12).
The inserted reply is in the wrong font	Open reply uses the font chosen in the pane.	Choose your font and size above Open reply (remembered). AI draft response inserts at the cursor and takes your font automatically.
The pane closes when I pick another email	It was not pinned.	Click the pin at the top right of the pane once.
It does not work on my phone or another computer	The add-in service runs on this PC only.	Use it in Outlook on the PC where emailbudAI is installed.

F. The pane won't load in Outlook on the web (browser settings)

Outlook on the web loads emailbudAI's pane from your own PC (`https://localhost:8765`). Recent versions of Edge (143 and later), Chrome (142 and later) and Firefox (153 and later) stop websites reaching addresses on your PC or local network unless you allow it, and Outlook on the web does not yet ask for that permission properly, so the pane can stay blank, keep loading or show an add-in error. Classic Outlook is not affected. Microsoft has fixed this for Word, Excel and PowerPoint on the web but not yet for Outlook.

First check: is emailbudAI reachable from the browser?

1. In the same browser, open `https://localhost:8765/health`.
2. **Shows** `{"ok": true, "app": "emailbudAI", ...}` with no warning: emailbudAI is fine and the browser setting below is the problem.
3. **A certificate or security warning**: the browser doesn't trust emailbudAI's certificate. In Edge or Chrome, run **Set up and start** in emailbudAI's add-in window and click Yes when Windows asks; in Firefox, see below.
4. **'Can't reach this page'**: the add-in service isn't running. Run **Set up and start** in emailbudAI's add-in window.

Browsers label the setting **Local network access**. Newer versions split it in two: one for your **local network** and one for **this device** (also called loopback). emailbudAI needs the 'this device' one, so allow both where you see two.

Microsoft Edge

1. Go to `edge://settings/privacy/sitePermissions/allPermissions/localNetworkAccess` (Settings > Privacy, search, and services > Site permissions > All permissions > **Local network access**).
2. Under **Allowed to connect to any device on your local network** click **Add site** and add, one at a time: `https://[*.]cloud.microsoft`, `https://[*.]office.com`, `https://[*.]office365.com`,

and `https://outlook.live.com` for an Outlook.com or Hotmail account. If there is a separate 'this device' permission, add the same sites there.

3. Close every Edge window, open Outlook on the web again, select an email and open emailbudAI. If Edge asks to let the site connect to devices or apps, click **Allow**.
4. Still not loading: go to `edge://flags/#local-network-access-check`, set **Local Network Access Checks** to **Disabled** and click **Restart**. This turns the protection off for every site, so treat it as a stop-gap until Microsoft fixes Outlook on the web, and set it back to Default afterwards. Later Edge versions may remove the flag.

Google Chrome

1. Go to `chrome://settings/content/localNetworkAccess` (Settings > Privacy and security > Site settings > Additional permissions > **Local network access**).
2. Make sure **Sites can ask to connect to any device on your local network** is on. Under **Allowed to connect to any device on your local network** click **Add** and add the same sites as for Edge. If Chrome shows a separate permission for apps or services on this device, add them there too.
3. Close every Chrome window, open Outlook on the web again and open emailbudAI. If Chrome asks to **Look for and connect to any device on your local network**, click **Allow**.
4. Still not loading: go to `chrome://flags/#local-network-access-check`, set it to **Disabled** and click **Relaunch** (a stop-gap, as for Edge).

Mozilla Firefox

Firefox keeps its own list of trusted certificates, so it needs one extra step.

1. **Trust emailbudAI's certificate:** Settings > Privacy & Security > **Certificates**, tick **Allow Firefox to automatically trust third-party root certificates you install** (or set `security.enterprise_roots.enabled` to true in `about:config`), then restart Firefox. Check with `https://localhost:8765/health`: it should open without a warning.
2. **Allow the local connection:** Settings > Privacy & Security > Permissions, next to **Device apps and services** click **Settings…** and allow Outlook's sites (do the same for **Local network devices** if they appear). When Firefox asks while Outlook is open, choose **Allow** and tick **Don't ask again for this site**.
3. Still not loading: in `about:config` set `network.lna.skip-domains` to `*.cloud.microsoft,*.office.com,*.office365.com,outlook.live.com`, or as a stop-gap set `network.lna.blocking` to false. Restart Firefox.

For IT administrators: browser policies

These settings can be pushed with Group Policy or Intune instead of changing each browser. List Outlook's sites (as above) as values 1, 2, 3 and so on.

Browser	Policy (HKLM\SOFTWARE\Policies\...)	Notes
Edge	Microsoft\Edge\LocalNetworkAccessAllowedForUrls, and in newer versions LoopbackNetworkAllowedForUrls	Edge 140 and later. LocalNetworkAccessRestrictionsTemporaryOptOut is a temporary opt-out that Microsoft says will go after Edge 152.
Chrome	Google\Chrome\LocalNetworkAccessAllowedForUrls, and from Chrome 147 LoopbackNetworkAllowedForUrls	The loopback policy covers requests to the PC itself, which is what emailbudAI uses.
Firefox	LocalNetworkAccess policy (policies.json or Group Policy), with skip domains for Outlook's sites	Also set Certificates > ImportEnterpriseRoots so Firefox trusts emailbudAI's certificate.

> **Note.** Microsoft does not say whether allowing Outlook's own sites covers the add-in frame inside them, so test the setting before relying on it. The browser flag is the dependable stop-gap until Microsoft updates Outlook on the web.

G. Storyboard, Library, scheduler, To Do, appearance and updates

What you see	Why it happens	What to do
An email's status says 'Folder not found'	Neither of the project's save folders exists, or the network drive isn't connected. emailbudAI doesn't create folders.	Check the folders in Save emails to / Or save to (Open shows them), reconnect the drive, then click Save Emails again.
File on Send can't be turned on	It works only in the new Outlook for Windows, and emailbudAI hasn't found new Outlook on this PC.	Open the emailbudAI pane in new Outlook once (with the latest add-in file), then try again.
No 'File to …?' check when I click Send	Outlook still has the older add-in file, you're in classic Outlook or the web, or File on Send is off.	Update the add-in file (chapter 12), restart new Outlook, and check Storyboard > Sent emails…
Sent emails aren't saved automatically	The option is off, emailbudAI isn't sure of the project (they wait in Unallocated), or the project has no save folder.	Check Storyboard > Sent emails…, move the email to a project, or set the save folder.
Saved emails aren't marked in Outlook (Microsoft 365)	The extra permission to change categories hasn't been given.	Click Save Emails, then **Allow…** in the message. If your organisation blocks it, ask IT to approve Mail.ReadWrite and MailboxSettings.ReadWrite for your emailbudAI app registration.
'couldn't be marked in Outlook'	Outlook was busy, or the email was moved or is in a mailbox you can only read.	The emails are still saved. Close any open Outlook dialog and click Save Emails again: only unmarked emails are retried.
The Library says the folder can't be reached	The network drive is disconnected, or you're working away from the office without VPN.	Open the folder in File Explorer to reconnect, then click **Check now**. Search still works on what was read last time; opening emails needs the connection.
An email I saved doesn't appear in the Library	The library is checked every 5 minutes, the save folder isn't inside the library folder, or the project isn't in what this PC indexes.	Click **Check now**. Make sure the project's Save emails to folder is inside the library folder, and check **Index on this PC** in Library > Settings.
A colleague's emails don't appear	They don't have the library set up, saved outside the library folder, or you can't open that project folder.	Ask them to set the same library folder. Emails they drop in by hand (.msg / .eml) are found anyway.
'Someone else is updating the shared project list'	Two PCs changed projects at the same moment.	Nothing is lost: it tries again at the next check. Click Check now after a few seconds.
Lots of emails are in Unallocated	The AI wasn't running, or the emails don't mention a project.	Check the AI (More > Mail account), add keywords or addresses to your projects, then click **Re-sort**. Or use **Move to**.
'AI couldn't sort it'	The AI model wasn't running or stopped.	Make sure Ollama is running, then click **Re-sort**.

What you see	Why it happens	What to do
A ticked project wasn't saved ('left out')	Its Save emails to folder is empty, so it's left out of saving.	Enter a full folder path or click Browse..., then click Save Emails again.
Failed: folder can't be reached	A network drive is disconnected or you don't have permission.	Open the folder in File Explorer to reconnect it, then save again. Only unsaved emails are retried.
Failed: not in the mailbox any more	The email was deleted or moved to an archive after emailbudAI read it.	Find it in Outlook and drag it into the folder yourself, or restore it and save again.
Save Emails says it needs your mail password	IMAP accounts need your password to download the original emails.	Click **Refresh mail** (it asks for the password), then click Save Emails again.
The scheduler never runs	Not enabled, the PC was asleep, or idle conditions never met.	Open the Scheduler and click **Check now**; it explains why. Click **Run now** to test.
Sync with Microsoft To Do fails	Signed out, or Tasks.ReadWrite was not added.	Add **Tasks.ReadWrite** in Entra (chapter 3), then sign in again.
I can't find the tray icon	Windows hides some icons.	Click the small ^ beside the clock.
An update failed	A file was in use or the download was incomplete.	Nothing is lost: the previous version is restored automatically. Close emailbudAI fully and try again.

H. Reinstalling and starting fresh

- **Repair:** run emailbudAISetup.exe again over the same folder. It keeps what is installed and fixes what is missing, including a broken Python environment.
- **Full reinstall:** uninstall from Installed apps, then run the installer again. Your emails and settings stay in %APPDATA%\emailbudAI.
- **Reset settings only:** close emailbudAI, rename `%APPDATA%\emailbudAI\config.json` to config.old.json, and start again.

I. Collecting information to get help

If a problem is still not solved, send a short description, the exact message (a screenshot is ideal) and:

Item	Where to find it
Installation logs	`<install folder>\logs\install.log`, `python-setup.log` and any `python-*.log` (default folder: %LOCALAPPDATA%\Programs\emailbudAI).
Scheduler log	%APPDATA%\emailbudAI\scheduler.log, or **View log** in the Scheduler.
Outlook add-in log	%APPDATA%\emailbudAI\addin.log.
Project library	The settings in the Library tab, and whether `<library>\_emailbud\library.json` exists.
Version	In the window title and on the welcome screen, for example 'emailbudAI 2026.11.12.18'.
Your PC details	Windows version, memory, and the PC check from the installer's first screen.

> **Warning.** Logs can contain email subjects and addresses. Look through them before sharing, and never send passwords or app passwords.

Sources

The Outlook steps follow Microsoft's own instructions: *Use add-ins in Outlook* (support.microsoft.com, updated September 2026) and *Sideload Outlook add-ins for testing* (learn.microsoft.com, updated April 2026). Outlook changes often; if a menu has moved, the Add-Ins for Outlook window at `https://aka.ms/olksideload` is the reliable way in. The browser settings in section F follow Microsoft's *Local Network Access in Microsoft Edge* and *Control a website's access to the local network in Microsoft Edge*, Google's Chrome Enterprise policy list (LocalNetworkAccessAllowedForUrls, LoopbackNetworkAllowedForUrls), Mozilla's *Control personal device and local network permissions in Firefox* and *Set up Certificate Authorities (CAs) in Firefox*, and the open Outlook add-in reports on Microsoft's office-js issue tracker (issues 6174, 6426 and 6860), as of November 2026. Browsers change these settings often; if a name has moved, search the browser's settings for 'local network'.