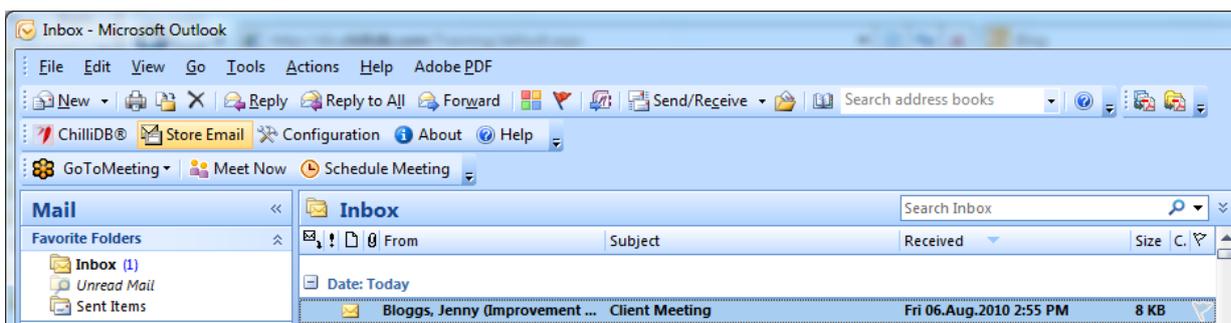


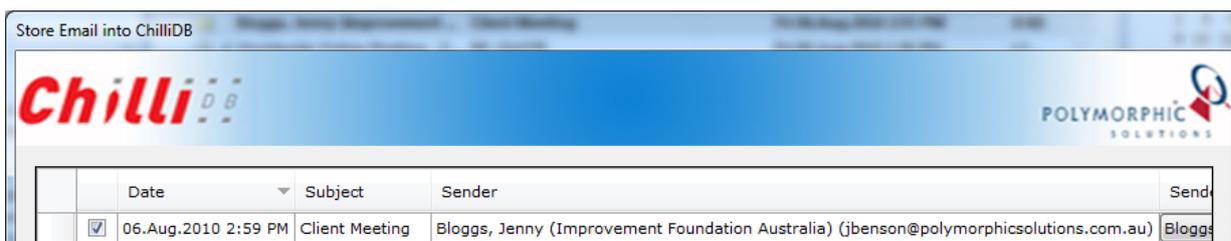
Storing an Email from Outlook into ChilliDB

You are able to store an email from Outlook into ChilliDB. Before doing this it is important that you look at the Configuration options and save any default Note categorisation you would like. This is useful if you typically save the same types of notes.

1. Select the email or emails you would like to save in ChilliDB.
2. From the ChilliDB toolbar within Outlook, click on **Store Email**.



3. The *Store Email into ChilliDB* screen will pop up.

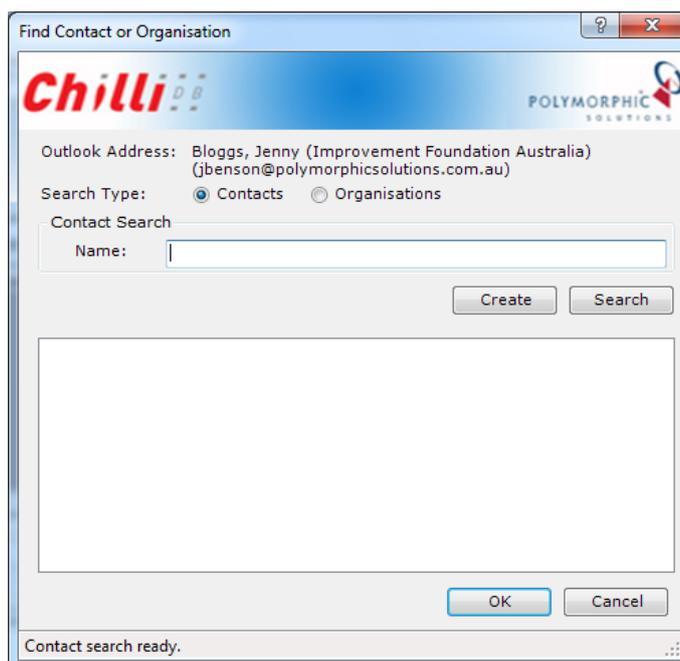


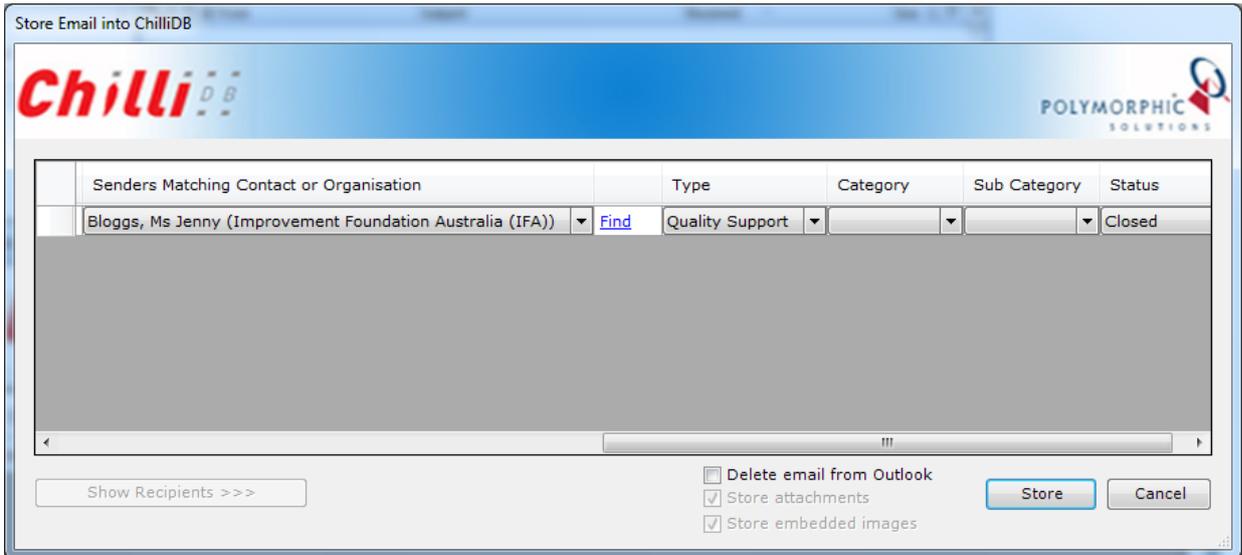
4. The Subject will be the note title when it is saved into ChilliDB. To change what this says, click into the Subject field and type what you would prefer the note title to be.

5. ChilliDB will try to match the contact and organisation from your system, displayed under the 'Senders Matching Contact or Organisation' field. If it hasn't been able to match the sender or if you would like to change it, click on the **Find** link.

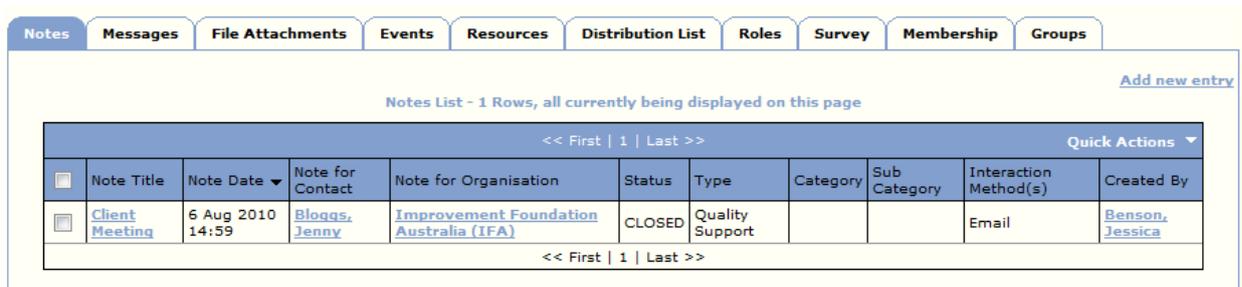
- You can search by the Contacts or Organisation in ChilliDB, or
- Click on **Create** to define a new contact or organisation in ChilliDB.

6. Select the **Type**, **Category** and **Sub Category** for saving the note.
7. Select the **Status** of 'Open' or 'Closed'.
8. Select the **Delete email from Outlook** checkbox if you would like it to delete after storing in ChilliDB.
9. Click on **Store**.





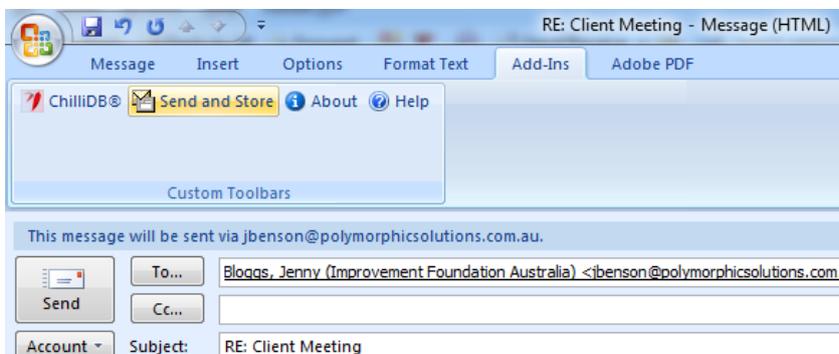
10. If you log into ChilliDB and go to your user (or the sender's contact or organisation), you will see the note stored in the system.



Send Emails from Outlook and Store Notes into ChilliDB

You are able to send an email from Outlook and store it into ChilliDB.

1. Create your email in Outlook.
2. Click on the **Add-Ins** menu.
3. Click on **Send and Store**



4. The *Store Email into ChilliDB* screen will pop up. Make any changes to the Note Title, Sender, Type, Category, Sub Category and Status and click on **Store**.
5. Your email will not only be sent via Outlook (and in your Outlook sent items), but a note will now be saved in ChilliDB.