

## 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.

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| Mail «                         | 🔄 Inbox                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                        | Search Inbox            | ∢ ح         |
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| Inbox (1)                      | 🖃 Date: Today                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                        |                         |             |
| Sent Items                     | Bloggs, Jenny (Improvement                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Client Meeting                         | Fri 06.Aug.2010 2:55 PM | 8 KB        |

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

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| (   | <i>C  </i> | <b>h</b> / | lli                 |                | POLYMORP                                                                               |        |
|     |            |            | Date 🔻              | Subject        | Sender                                                                                 | Sende  |
|     |            | V          | 06.Aug.2010 2:59 PM | Client Meeting | Bloggs, Jenny (Improvement Foundation Australia) (jbenson@polymorphicsolutions.com.au) | Bloggs |

- 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.
- 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.



| Sto | ore Em   | ail into ChilliDB                                           |      | Sec.                       |             | -                   | ۰. |              |         |
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| (   | <b>;</b> | hilli                                                       |      |                            |             |                     |    | POLY         | MORPHIC |
|     |          | Senders Matching Contact or Organisation                    |      | Туре                       |             | Category            |    | Sub Category | Status  |
|     |          | Bloggs, Ms Jenny (Improvement Foundation Australia (IFA)) 🔻 | Find | Quality Support            | •           |                     | •  |              | Closed  |
|     |          |                                                             |      |                            |             |                     |    |              |         |
|     | ,        |                                                             |      | 🗖 Delete en                | nail        | from Outlook        | _  |              |         |
|     |          | Show Recipients >>>                                         |      | √ Store atta<br>√ Store em | achn<br>bed | nents<br>ded images |    | Store        | Cancel  |

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.

| Not | 25                                     | Messages                 | File Attac          | hments                  | Events            | Resources                  | Distribution  | ı List         | Roles      | Survey    | Membe           | rship           | Groups        |                    |
|-----|----------------------------------------|--------------------------|---------------------|-------------------------|-------------------|----------------------------|---------------|----------------|------------|-----------|-----------------|-----------------|---------------|--------------------|
|     | Add new entry                          |                          |                     |                         |                   |                            |               |                |            |           |                 |                 |               |                    |
|     |                                        |                          |                     |                         | Notes Lis         | st - 1 Rows, all           | currently bei | ng displa      | yed on     | this page |                 |                 |               |                    |
|     | << First   1   Last >> Quick Actions 🔻 |                          |                     |                         |                   |                            |               |                |            |           |                 |                 |               |                    |
|     |                                        | Note Title               | Note Date 👻         | Note for<br>Contact     | Note fo           | r Organisation             | Status        | ; Туре         |            | Category  | Sub<br>Category | Intera<br>Metho | ction<br>d(s) | Created By         |
|     |                                        | <u>Client</u><br>Meeting | 6 Aug 2010<br>14:59 | <u>Bloggs,</u><br>Jenny | Improv<br>Austral | rement Founda<br>lia (IFA) | cLOS          | D Qual<br>Supp | ity<br>ort |           |                 | Email           |               | Benson,<br>Jessica |
|     | << First   1   Last >>                 |                          |                     |                         |                   |                            |               |                |            |           |                 |                 |               |                    |

## 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

| <b>C</b> ) | 390                      | <b>▲ →</b> ) <del>=</del> |              |                  | RE: CI            | ient Meeting - Message (HTML)                                                     |
|------------|--------------------------|---------------------------|--------------|------------------|-------------------|-----------------------------------------------------------------------------------|
| 9          | Message                  | Insert                    | Options      | Format Text      | Add-Ins           | Adobe PDF                                                                         |
| 🎢 Chil     | liDB® <mark>🎦 Ser</mark> | nd and Store              | 🚹 🕄 About    | 🕡 Help           |                   |                                                                                   |
|            | Cu                       | ustom Toolb               | ars          |                  |                   |                                                                                   |
| This m     | essage will be           | sent via jbe              | nson@polyr   | norphicsolutions | .com.au.          |                                                                                   |
| Send       | To                       | Bloggs                    | , Jenny (Imp | rovement Foundat | tion Australia) < | <jbenson@polymorphicsolutions.com.a< td=""></jbenson@polymorphicsolutions.com.a<> |
| Accour     | nt - Subjed              | : RE: Cli                 | ent Meeting  | 3                |                   |                                                                                   |

- 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.