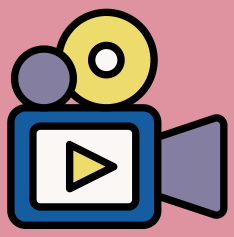
STORING DOCUMENTS OUTSIDE EMAIL

STREAMLINE YOUR GMAIL INBOX

BLUE BUTTERFLY SOLUTIONS:
TAMMY SCHAEFER



Click to watch video

STEP BY STEP GUIDE TO STORE DOCUMENTS IN GOOGLE KEEP, GOOGLE DRIVE OR TRELLO

Strategies to stop treating Your Inbox like a Storage Unit.

- Saving Both Email and Attachment: Use Trello to ensure both are stored together for easy access.
- For Simple Attachment Storage: Use Trello, Google Keep or Google Drive to quickly organize files into client folders.

Here's steps for applying these strategies:

1. Save Emails and Attachments to Trello

- **Create a Board in Trello :** Set up Email to Board in the board you wish to send emails to. If you don't know how to do that, here is a link to learn how.
- Once you've created a board and set up email to board, you simply forward the email to the specific board. Then delete the email in Google Mail.

Best For: Saving both the email and attachment for easy reference in an organized Trello board.

2. Save Emails and Images in Google Keep

- Open the email you want to save.
- Create a new note in Google Keep and copy-paste the content from the email.
- Add Image:
- If the email includes an attachment, download the file and upload it to the note by clicking the "Add Image" icon.
- Hit the Pin to keep it at the top, color code it, etc.

- **Best For:** Saving quick ideas, smaller attachments, or notes tied to specific emails.

3. Saving Files and Emails in Google Drive

- **Saving Attachments to Google Drive**
  - Download the Attachment:
  - Open the email in Gmail and click the Google Drive icon next to the attachment.
  - Choose a Folder:
  - Select a destination folder in Drive, or create a new folder to keep your files organized.
  - Verify Upload:
  - Open Google Drive and navigate to the folder to ensure the file is saved correctly.

- **Saving Emails to Google Drive**
  - Open email you want to save
  - Hit the three dots and choose to download this message.
  - Drag and drop into the Google Drive Folder you choose.

4. Tips for Efficient Use

- Use Descriptive File Names: Label your notes and files clearly to make them easy to find.
- Combine Google Keep and Drive: Save quick notes and ideas in Keep, and move more extensive files and resources to Drive.
- Regularly Review and Archive: Periodically clean up files and notes to maintain an organized system.

Want Help With Your Email?

[Schedule A Chat With Me]