STORING DOCUMENTS OUTSIDE EMAIL

# STREAMLINE YOUR OUTLOOK INBOX

BLUE BUTTERFLY SOLUTIONS:
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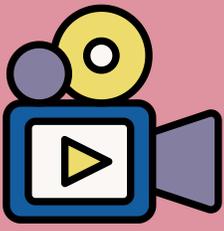
## Strategies to stop treating Your Inbox like a Storage Unit.

- Saving Both Email and Attachment: Use OneNote to ensure both are stored together for easy access.
- For Simple Attachment Storage: Use OneDrive to quickly organize files into client folders.

**Here's steps for applying these strategies:**

## 1. Save Emails and Attachments to OneNote

- **Open OneNote: Make sure you have OneNote installed and connected to your account.**
    - Select Your Notebook: Choose the notebook or section where you want to save the email and attachment.
    - Save to OneNote:
        - Open the email in your inbox.
        - Use the "Save to OneNote" option (usually found in your email tools).
        - Select the desired section in OneNote and confirm the save.
    - Verify in OneNote:
        - Open OneNote and navigate to the selected section.
        - You'll see the email and its attachment saved together.

**Best For:** Saving both the email and attachment for easy reference in an organized note system.

## 2. Save Attachments to OneDrive

- **Save Directly from Email:**
- Open the email with the attachment.
- Click the "Save to OneDrive" option (often labeled "Save Attachments").
- Open your OneDrive.
- Navigate to the Email Attachments folder.
- Move the file into the appropriate client folder.
- **Note:** This method saves only the attachment, not the email itself.

- **Best For:** Organizing individual attachments into specific client folders.

## 3. Download and Save Manually

- **Download the Attachment:**
- Open the email and download the attachment to your computer.
- Open OneDrive:
- Navigate to your OneDrive folder or open the application.
- Upload the File:
- Drag and drop the downloaded file into your desired client folder in OneDrive.

**Best For:** Manual control to eliminate extra steps.

## Want Help With Your Email?

**Schedule A Chat With Me**