



Notes

Help Documentation

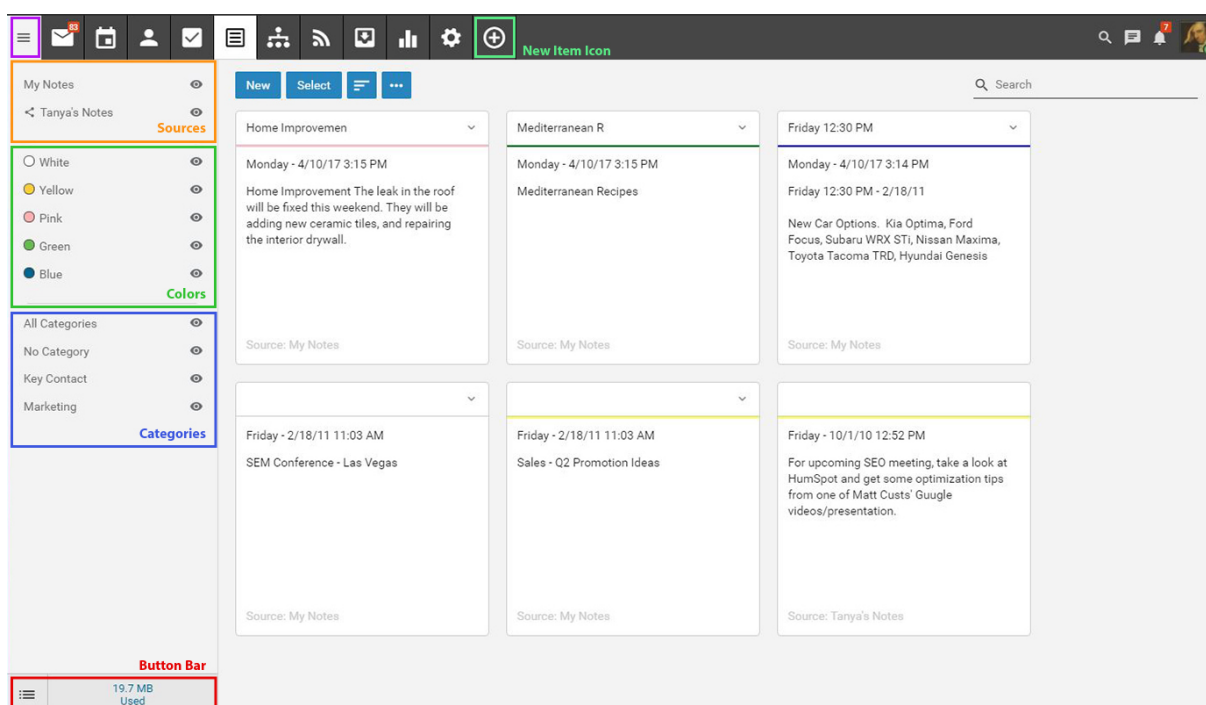
Notes

Notes Overview

SmarterMail's Notes feature provides users with the electronic equivalent of paper sticky notes. Use notes to jot down questions, ideas, reminders or anything else you would write on note paper. This feature is especially convenient when used to save bits of information you may need later, such as directions or text you want to reuse in other items or documents.

To access your notes, click the Notes icon . By default, the My Notes source is displayed. (Though there may not be any notes listed just yet.) If other notes sources are being shared with you, they will appear beneath My Notes once they've been mapped. (see Mapped Resources for more information on sharing resources.) Making multiple notes sources visible will display all of the notes, from each source, together in the notes view. You can then view or hide notes sources to either limit or expand the number of notes you're viewing.

To help you understand the different areas of the Notes section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas.(click for larger image)



Navigating Your Notes

Burger Icon

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

Notes Views

In general, the Notes page is divided into two sections:

- The Notes view displays all of your Notes sources and any Categories that have been created. This includes "My Notes", which are notes you add to SmarterMail, and any shared notes source.
- Individual cards that represent every note you have displayed.

All Notes View

When you view your notes, each note you have created or that's being shared with you will be listed on a separate card. Each card lists the following information:

- Subject - The note's descriptive title. E.g., "Shopping List" or "Motivational Sayings"
- Description - The contents of the note. Using the HTML editor, a note's contents can include bold text, lists, different fonts or fonts with different colors, include pictures, links to websites or videos and more. You can be as creative as you like.
- Source - This tells you where the note came from, or, in cases where notes are shared with others, where you want the note saved. E.g., My Notes or "Marketing Notes".

In general, the following options are available from the All Notes view:

- New - Creates a new note.
- Select - Allows you to select more than 1 note at a time. To select multiple notes, click Select and then click on one or more note cards. To exit Select mode, click the Select button again. To de-select a note, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:
 - Select All - Selects all notes in the list you are viewing.
 - Deselect All - Deselects all the selected note(s).
 - Delete - Deletes the selected notes. NOTE: You can also use the Delete key on your keyboard.
- Sorting menu - Clicking the Sorting menu brings up the following options:
 - Date - The date the note was created.
 - Color - The color category assigned to the note.
 - Subject - The name/title of the note.
 - Ascending - Sort order placing the items that are most active/recent/important first.
 - Descending - Sort order placing the items that are least active/recent/important first.

Creating New Notes

Starting a new note is extremely easy: simply click the New button in the All Notes view. Once you do this, you'll be able to start entering your note details. These include:

Subject - This is the simple name for the note, like "Shopping List" or "Meeting Notes".

Description - This is where you enter the actual note contents. The note description area is fully HTML compliant with a rich editor so it's possible to stylize your note contents with different fonts and colors, links to outside resources, embedded videos, etc.

Note Details and Categories

When you add a new note in SmarterMail, you can save as much or as few details about the note as you like. In general, these details are divided into two sections:

- **Details** - Select the note Source -- either My Notes or, if you're sharing notes with others, you can save your notes there. Note colors are a great way to keep notes of a specific type neatly organized. As a side note, the colors available match the colors of traditional paper sticky notes. Note: The color and text of the note are the only required fields to save a note.
- **Categories** - A category provides a way to organize your notes into manageable groups. To add a category to a note, simply move the toggle next to the category you want to apply. To create a new Category, use the Cog at the top of the Notes view.

Searching Notes

If you have a large number of notes in your notes list, finding a specific one can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find notes quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the All Notes view. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search both the the Subject and Description of every note for matches and display the results. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."