



Notes

Help Documentation

Notes

Notes Overview

SmarterMail allows you to store all of your notes in a single place, accessible from the web wherever you are. Notes can be used to store to-do's or important checklists. Some features of SmarterMail notes are:

- Several colors to choose from
- The ability to assign a category to a note

To get started, click the Collaborate button on the main toolbar, and then select the Notes control bar in the left side bar.

Manage Notes

The My Notes page lists all of your notes in one place and lets you sort and track them easily. View your notes by clicking on My Notes under the Notes tree in the sidebar.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Note - This can be accomplished three different ways:
 - Select the note you want to edit and click the Edit icon from the actions toolbar; or
 - Right click the note you want to edit and select Edit from the drop down list; or
 - Double-click the note you want to edit
- Deleting a Note - This can be accomplished two different ways:
 - Select the note you want to delete and click the Delete icon from the actions toolbar; or
 - Right click the note you want to delete and select Delete from the drop down list
- Sharing Notes with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic [Sharing Your Own Resources](#) .
- To search your notes, click the Search icon on the action toolbar. This will open up a search toolbar below the actions toolbar which will allow you to search.

Create a New Note

To create a new note, either click on New Note in the tree view on the left hand side, or click the New icon on the actions toolbar.

- Color - Choose a color to make this note. You may wish to assign colors based on urgency or however you wish to color code.

- Note - The actual body of the note.
- Categories - You may assign one or more categories to each note to make for easier searching.
- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

Outlook Integration

SmarterMail Sync

SmarterMail Sync is an on-demand synchronization tool. After installing it, a toolbar will be added to your copy of Microsoft Outlook that will allow you to easily synchronize with SmarterMail whenever you need. [More Info on SmarterMail Sync.](#)

Sharing

Sharing a resource, such as a calendar, contacts, notes, tasks, or e-mail folders, will allow the users you specify to access the resource with a pre-determined permission level. [More Info on Shared resources.](#)