



Notes

Help Documentation

Notes

Notes Overview

SmarterMail's notes feature provides users with the the electronic equivalent of paper sticky notes. Use notes to jot down questions, ideas, reminders, and anything 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 notes in My Notes will load. Note: To view different task lists (such as shared lists or mapped resources), click the Notes menu at the top of the navigation pane and select the desired list.

Navigating Your Notes

When you view your notes, the page is divided into two sections:

- The navigation pane displays the notes in the list you are viewing. To view details for a specific note, simple click the desired note.
- The content pane displays all available details about the selected note.

In general, the following options are available from the navigation pane toolbar:

- New - Creates a new note.
- Actions - Click this button and select the appropriate option to select all notes or delete notes.
- Select All - Selects all notes in the list you are viewing.
- Delete - Deletes the selected note(s).
- View - Click this button and select the appropriate option do filter notes, sort notes, or choose the details that are displayed about a note in the navigation pane.
- Filter - Filters notes by the selected category or color.
- Sort - Sorts notes by text, color, or date in ascending or descending order.
- Visible Fields - Choose which note details are displayed in the navigation pane.

In general, the following options are available from the content pane toolbar:

- Edit - Edits the selected note.
- Delete - Deletes the selected note.

Creating New Notes

To create a new note, click **New** in the navigation pane toolbar. This will open a new note window that you will use to add the note to SmarterMail.

Saving Note Details

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

- **Details** - Type the text of the note and specify the color of the note. **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, simply click the **Master Categories** button and type the new category name.
Note: Be sure to separate categories with a comma.

Searching Notes

If you have a large number of notes in your notes list, finding a specific notes 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 navigation pane. Then click the magnifying glass or press **Enter** on your keyboard. SmarterMail will automatically search the notes list you are viewing for matches and display the results in the navigation pane. **Note:** Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Advanced Search Overview](#) .