



# 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 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 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.

The screenshot displays the SmarterMail Notes interface. On the left is a sidebar with navigation options: Card View (selected), Grid View, My Notes (with an eye icon), and a list of note colors (White, Yellow, Pink, Green, Blue). Below these are 'All Categories' and a list of categories like 'No Category', 'Bold Predictions', 'Business', 'Communication', 'Contacts', 'Development', 'Editorial', 'Marketing', and 'Personal'. The main area shows a grid of notes. Each note card includes a title, a date and time, the source (e.g., 'My Notes'), and the note's content. The notes shown include:

- RELEASE NOTES** (Tuesday - 11/19/19 4:11 PM): ability to share multiple calendars added multiple notes, contacts, tasks — plus ability to share large number of file format changes (need more info) Massive sharing changes shares now are automatic
- MAPI BETA** (Wednesday - 11/20/19 10:12 AM): Things that will not be included (use Tim's post) Known issues (Read only shares is not working — don't try: Full control is working fine, but some clients don't respect read-only) Get release notes of what this version are
- Anthony Bourdain quote** (Monday - 8/12/19 2:44 PM): "To sit alone or with a few friends, half-drunk real time to look at those things and realize:" (includes an image of a kitchen counter)
- Spine 2D info** (Monday - 8/12/19 2:38 PM): Your license information: Name: Tim Uzzanti Email address: vendors@smartertools.com Date: 12 Oct 2017 Order number: 18BvzvLDfEe7LyNNDpT6ellgj Order total: \$299 License type: Professional
- Promotion Ideas** (Monday - 8/12/19 2:38 PM): NOVEMBER - 20th - 30th 50% off EVERYTHING (From NOW until the END of November) - New licenses - Add-ons (new or adding new to an existing license) - Support \*Could add Reinstatement and/or
- New Note with Formatting** (Monday - 8/12/19 2:38 PM): Hello! This is **BOLD TEXT** This is *ITALICIZED TEXT* and This is
- BMS email notes** (Monday - 8/12/19 2:37 PM): BMS email notes GENERAL
- SmarterMail Demo** (Monday - 8/12/19 2:37 PM): SmarterMail Need to lock down: SMTP
- 401K Funds to look at** (Monday - 8/12/19 2:37 PM): Vanguard Consumer Staples ETF (VDC) Vanguard Inter-Term Bond Index Adm (VBILX)

At the bottom left, there is a status bar showing '8.0 GB Used'.

## Navigating Your Notes

### **3 Bar Icon**

At the top of the folders view you'll see the 3 Bar 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 "Notes", which are notes you add to SmarterMail, and any shared notes source.
- Individual cards that represent every note you have displayed.

### **Viewing Notes**

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., Notes or "Marketing Notes".

In general, the following options are available when viewing all of your Notes:

- 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 Modified - 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. 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: Inline images over 200KB will cause the window to become unresponsive when using Code View. This is a known issue with the Froala editor.

## 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 the default Notes folder, any new or custom Notes folder you've created, or, if other users have shared their Notes with you, you can select one of those as the Source for your new Note. 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 enable the category you want to apply.

## 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 "%."

## Importing and Exporting Notes

SmarterMail allows users to create multiple different folders for various types of Notes. Users can create a folder for personal notes, for business notes, for notes about a particular topic and more. That said, there may be times when users want to import notes to a folder, or even export notes to be used in other applications, etc.

### Importing/Exporting Notes

To initiate the importing or exporting of notes, click the Actions (...) after clicking on a Notes folder.

From the dropdown, you'll see the following:

- Import - Allows you to import notes from an external file.
- Export to CSV - Exports all of your notes in a "comma separated values" format for importing into another application or even another SmarterMail account. NOTE: SmarterMail exports Notes in their original HTML format. Therefore, opening or otherwise editing the exported file in another application may prevent you from being able to use that CSV in another application. Therefore, it's recommended that you NOT open exported notes in Excel or even a text editor -- they should simply be exported then imported into another application.

### Importing Notes to SmarterMail

SmarterMail supports importing notes from a comma-separated text files (.csv). Follow these steps to import notes:

- Log in to your SmarterMail account.
- Click on the Notes icon.
- Select a specific folder for the imported Notes. If need be, create a new folder for the imported notes.
- Click the Actions (...) button.
- From the drop down menu, select Import .
- The Import Notes modal will load. Here, you can select which Notes folder to import your new notes to, such as the default Notes folder or any new folders you've created.
- Next, you can either drag-and-drop a CSV file into the "add files" area, or you can click on the "add files" box to open a desktop window so you can select the file you want to import.
- Once the you've added the file(s), click the Import button.
- The file will process, then you're presented with a Field mapping modal. Here, you'll map the Uploaded Field -- the fields found in the CSV -- to a corresponding Notes field. Whenever possible, SmarterMail will automatically map fields it recognizes, especially when importing

SmarterMail Notes.

- Once all fields are mapped, the process is complete.

## Exporting Notes from SmarterMail

Just as you can import notes from a CSV file, you can also export your own notes as a CSV file. These files can then be imported into other applications that accept these file types, or into another SmarterMail account. To export notes to a CSV file:

- Click the Notes icon.
- Click the Actions (...) button.
- From the dropdown menu, select Export to CSV .
- A standard Save window will appear that allows you to rename the file, choose where you want the file saved, etc.
- Click the Save button and you're done.

As mentioned, SmarterMail exports Notes in their original HTML format. Therefore, opening or otherwise editing the exported file in another application may prevent you from being able to use that CSV in another application. Therefore, it's recommended that you NOT open exported notes in Excel or even a text editor -- they should simply be exported then imported into another application.