ORGANIZE AND MANAGE NOTES

Notes can be viewed as icons or in a list. They can be organized by date, category, and color. It is also possible to forward notes to other people and to link notes to contacts.

Change Notes View
❖ Click the View Tab.
❖ Click the Change View button.

❖ A list of different views will appear. The options are:
   ❖ Icon – This view shows the notes as a post-it icon. The name of the Note will appear below the icon. The date and time the note was created does not appear in this view.
   ❖ Notes List – To view the notes in a list with the date and time the note was created, select this option.
   ❖ Last 7 Days – Use this view to display the notes that were created in the last seven days. The notes will be grouped by dates. Notes that are older than seven days will not display.

Assign Categories to Notes
Assigning a Category to Notes is the same as assigning a Category to an e-mail message or a Contact. The color of the Note will reflect the Category that has been selected.
❖ Do one of the following:
   ❖ Right-click one of the Notes and then select Categorize from the shortcut menu.
   ❖ Click the Note and then click the Categorize button in the Tags Group on the Home Tab.
❖ A gallery of Categories will display (see illustration at right).
❖ Click one or more of the Categories in the Available Categories list.
❖ To display a gallery of additional Categories, click the All Categories link at the bottom of the list.
   ❖ The Color Categories dialog box will appear (see illustration on next page).
   ❖ Click the check box to the left of the Category to select it.
   ❖ Click OK to exit the Color Categories dialog box.
   ❖ To assign a different color to the Category, click the Color list arrow.

Add a New Category
❖ Click the New button on the right side of the Color Categories window.
❖ The Add New Category dialog box will display (see illustration on next page).
❖ Type the name for the Category in the New Category text box.
Select a color for the new Category from the Color list.
To assign a shortcut to the Category, click the Shortcut Key list.
Click the OK button to exit the dialog box and save the changes.

Forwarding Notes to Others
Do one of the following:
- Right-click the Note and then choose Forward from the shortcut menu.
- On the Home Tab in the Actions Group, click the Forward button.
- Input an Email Address for the recipient in the To box.
- In the Message box, input a short message for the recipient.
- Click the Send button.
- Click OK to exit the Outlook Options window.