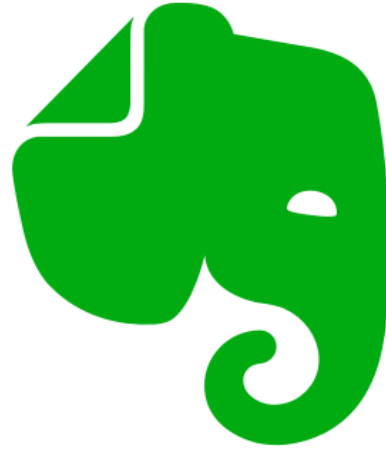


Evernote



For Everything

How To Store and Organize Life's Most Important Data

G. William James

Handheld Computer Solutions

How To Keep In Touch

www.gwilliamjames.com

william@gwilliamjames.com

@MyGWilliamJames



Handheld Computer
Solutions



G. William James



G. William James



RealGWilliamJames



Individual / Group Consultation

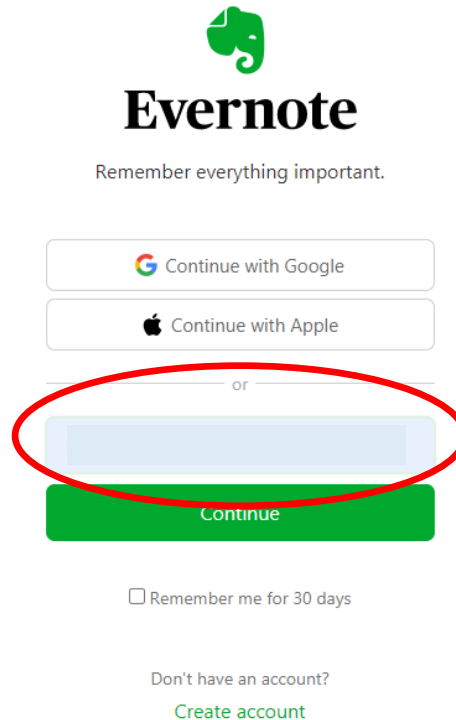


- ☐ Custom design your mobile office
- ☐ Get your Google SEO optimized
- ☐ Facebook marketing strategies
- ☐ Time management/mobile organization
- ☐ Online video marketing strategies
- ☐ Google Workspace (Google Enterprise Apps)

Schedule an appointment today
william@gwilliamjames.com

william@gwilliamjames.com

Subject Line Only!!!
(Your EN Login name)



The image shows the Evernote login interface. At the top is the Evernote logo (a green elephant head) and the text "Evernote" and "Remember everything important." Below this are two buttons: "Continue with Google" and "Continue with Apple". A red circle highlights the "or" separator and the email input field below it. Below the input field is a green "Continue" button. At the bottom, there is a checkbox for "Remember me for 30 days" and a link for "Don't have an account? Create account".

Evernote
Remember everything important.

Continue with Google

Continue with Apple

or

Continue

☐ Remember me for 30 days

Don't have an account?
[Create account](#)



How I Use Evernote

Multiple Graphic Displays

1. Apple Devices (App Store)

Looks and feels like most iOS applications

2. Android Devices (Google Play)

Conforms to the screen tap integration of Android devices

3. Evernote Web

Log in at www.evernote.com

4. Evernote Windows or Mac App.:

Download at evernote.com



Your Evernote Account

Multiple Graphic Displays

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4. **Evernote Windows or Mac App.:**

Download at evernote.com



Your Evernote Account

Choose Based On Your Needs

1. Evernote Basic- Totally Free

- Sync is limited to only 2 devices
- 60 MB of new uploads per month
- Searches for text in images

2. Evernote Premium \$7.99/month

- Sync is open to all your devices
- 1 GB of new uploads per month
- Access Notebooks Offline
- Email Forwarding into Evernote

3. Evernote Business \$14.99/month

- 10 GB of new uploads per month
- Search for text in PDFs and Office Docs
- Scan and digitize business cards
- Present Notes
- Team Collaboration
- Much more



Evernote For Everything

Creating A System

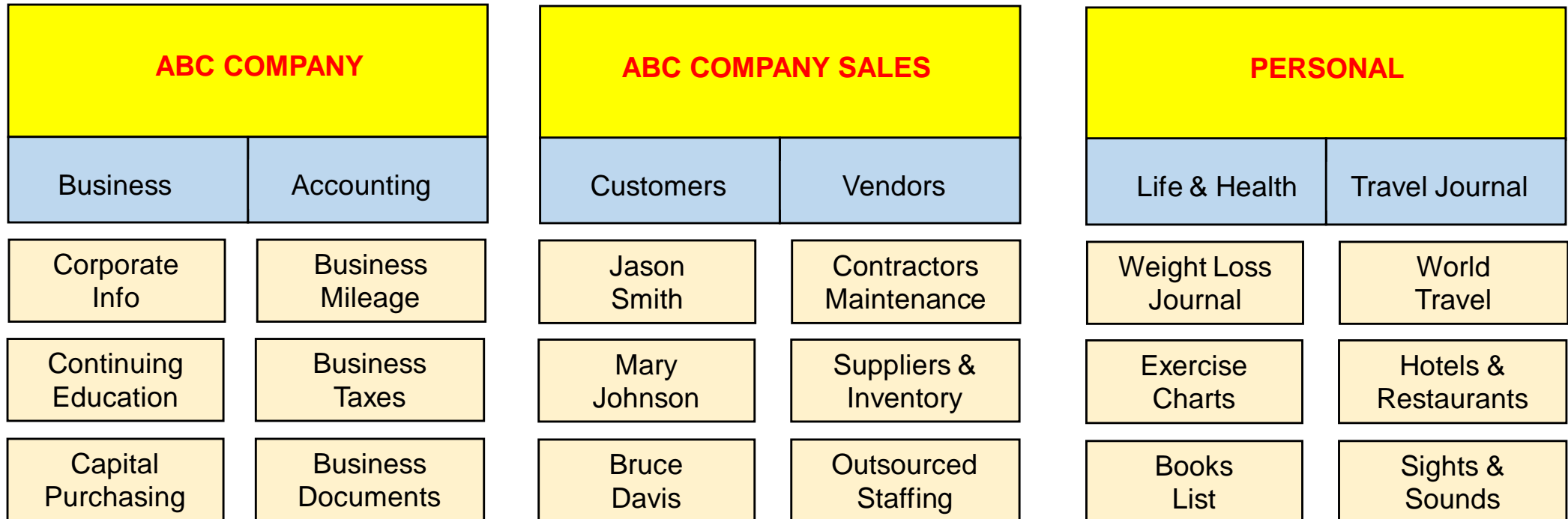
- ▶ **Notes-** Individual items of information filed inside notebooks
- ▶ **Notebooks-** A collection of organized notes
- ▶ **Stacks-** Make a Stack to build Categories of notebooks

Evernote Is An Organized Architecture

It starts by creating a system



Knowing how to organize your notes within your notebooks, making notes easily searchable, tagging notes for organization and making notes easy to share are the keys to creating a system that will serve you well in Evernote.



Evernote Is A Search Engine



Search for any text or image of text

Evernote search is powerful. It may look like a simple text search field, but advanced search syntax gives you the ability to search your notes by the date they were created, the type of media they contain (audio, images, etc.)—even where they were created.

- **Standard Search** Using any keyword, the Evernote will locate every instance if the queried term.
- **Tag Search**
- **Search Syntax-** Uses advanced identifiers for a more detailed search
 - Specialized, more advanced search options
 - Search by date, time, Clipped notes or has checkboxes, etc.
 - <https://help.evernote.com/hc/en-us/articles/208313828>

Evernote



The Evernote Web Clipper

- **A browser extension** That lets you capture web pages, article and useful information directly off the site and into a note on your Evernote. The Web Clipper is perfect for
 - Researchers
 - Project Managers
 - Product comparisons
 - Bargain Hunters
- **Capture-** Valuable information for future reference
 - Contacts from LinkedIn
 - Real estate listings
 - Articles and blog pages
 - Screenshots
- **Sync-** Sync the notes across all your devices
 - Add to Chrome, Safari and FireFox browsers
 - Add to mobile browsers Chrome and Safari





Google Universe Web Series

- Google Contacts & CRM
- The Hidden Secrets of Gmail
- Google Calendar Magic
- Master Your Google Drive Part I
- Master Your Google Drive Part II
- Google My Business, Ads, and SEO
- Google Photos & YouTube
- Google Chrome & Online Security

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- Customize your contacts in one sleek, easy-to-use system
- Build Personal Profiles that help you get leads and referrals
- Build postal and Gmail mailing lists
- Discover how Contacts interacts with all your Google mobile apps



Wednesday, March 17, 2021

1:00 pm Eastern

- Handouts
- Video Replay
- Personal Support

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Handheld Computer
Solutions



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RealGWilliamJames



THANK YOU!



william@gwilliamjames.com

Google Apps Coaching



- ❑ 1:1 Personalized Solution for Office & Mobile
- ❑ Custom Organize Your CRM
- ❑ Get your Google SEO optimized
- ❑ Facebook Marketing strategies
- ❑ Time Management System Integration
- ❑ G Suite (Google Enterprise Apps)
- ❑ Full Access To Video Library

Schedule an appointment today
william@gwilliamjames.com



Evernote

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- ▶ **Notebooks-** A collection of organized notes
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 - Project Managers
 - Product comparisons
 - Bargain Hunters
- **Capture-** Valuable information for future reference
 - Contacts from LinkedIn
 - Real estate listings
 - Articles and blog pages
 - Screenshots
- **Sync-** Sync the notes across all your devices
 - Add to Chrome, Safari and Firefox browsers
 - Add to mobile browsers Chrome and Safari

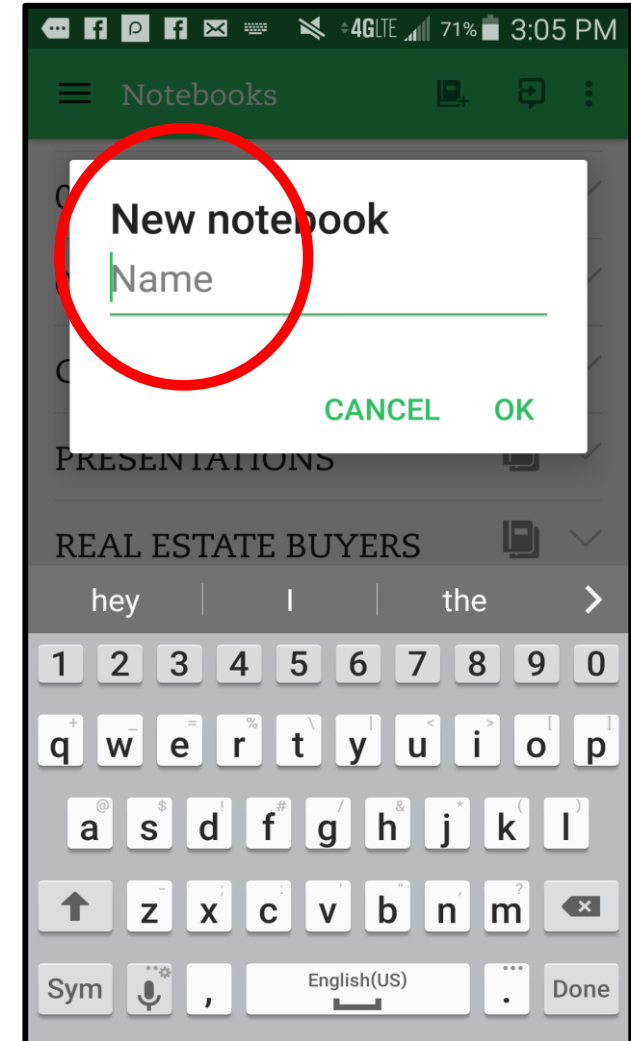
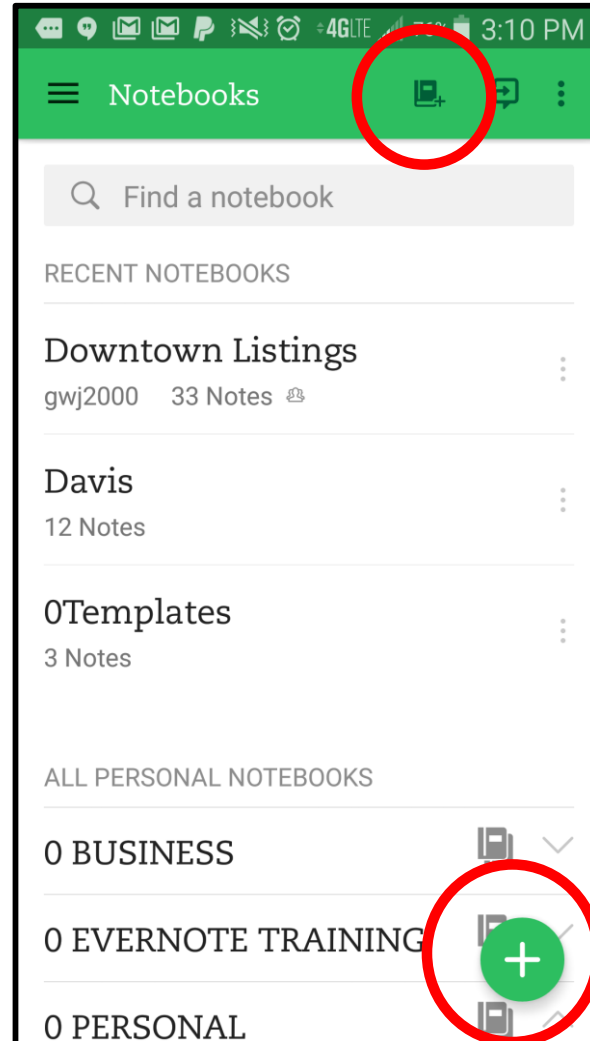
Creating A Notebook



1. Tap Notebooks Icon

2. Tap + to Add Notebook

3. Add notebook name



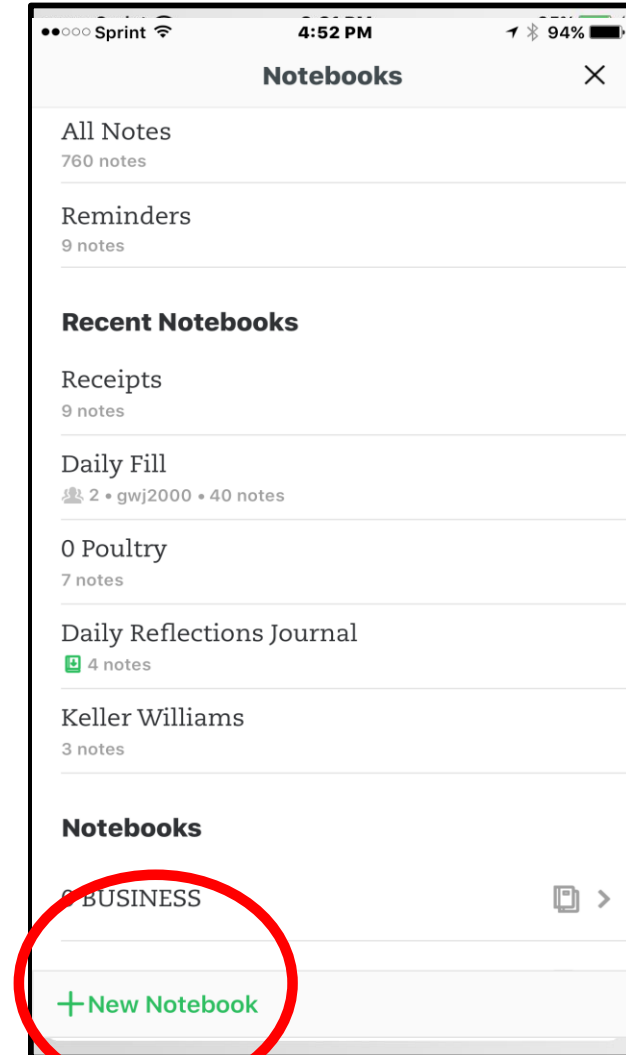
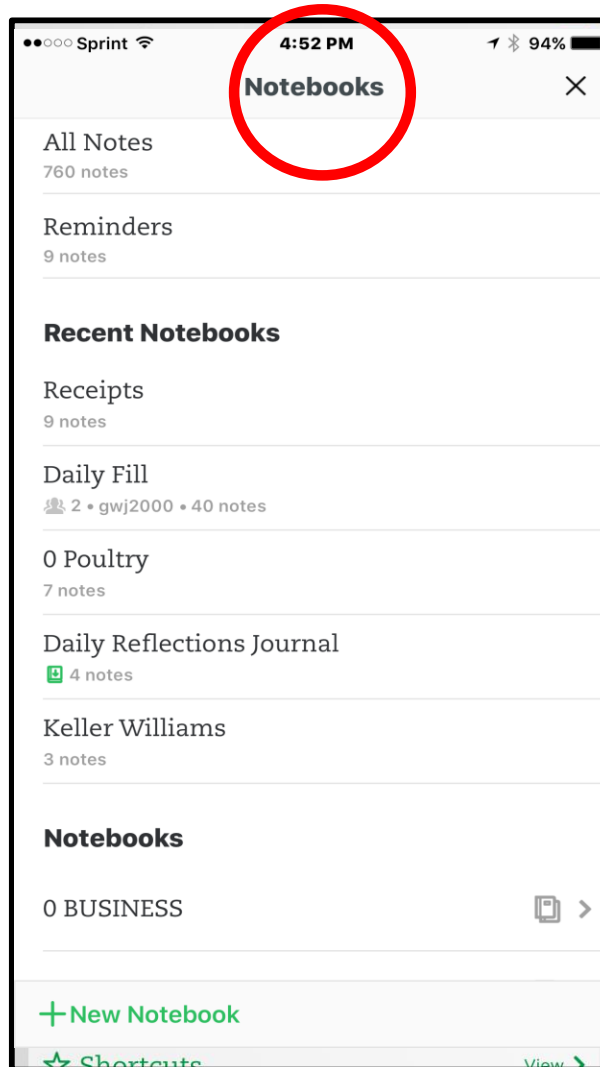
Creating A Notebook



1. Tap Notebooks

2. Select New Notebook

3. Add notebook name

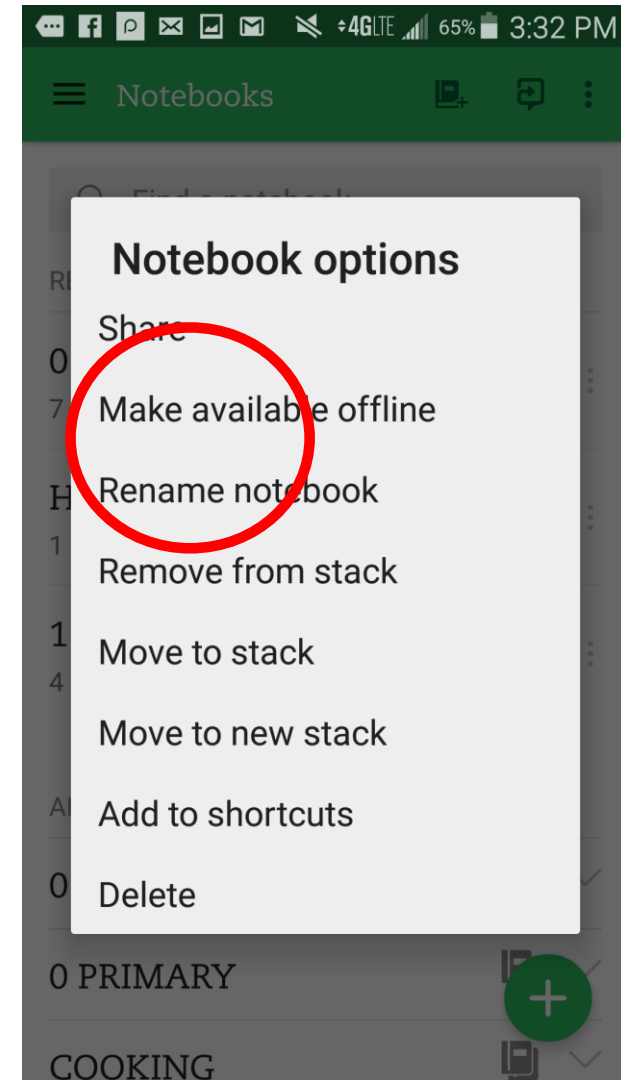
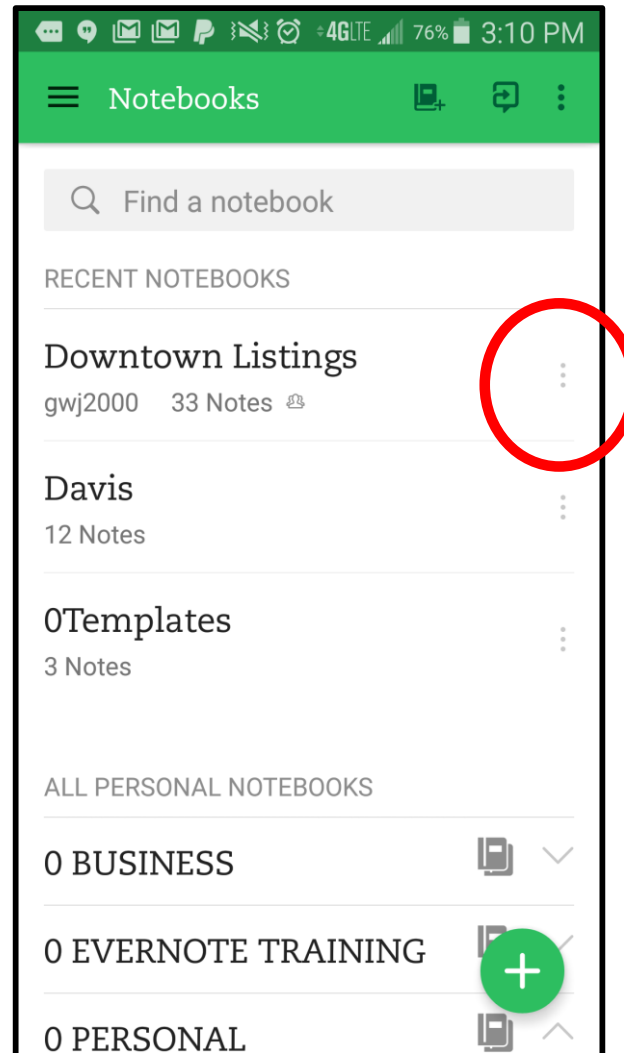


Editing Notebooks



1. Press down on notebook

2. Select from menu



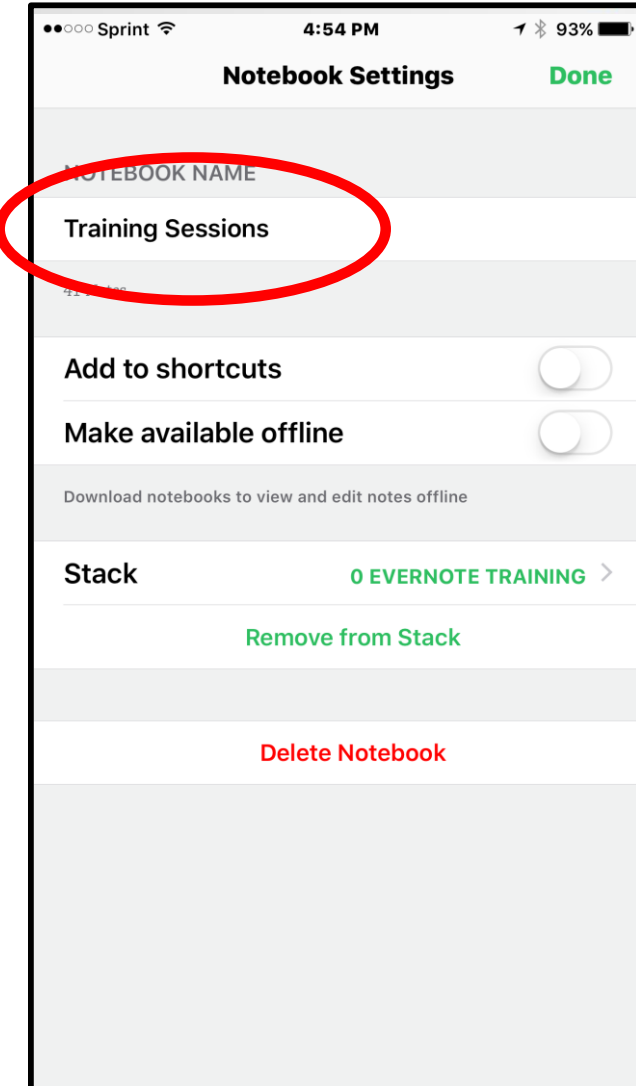
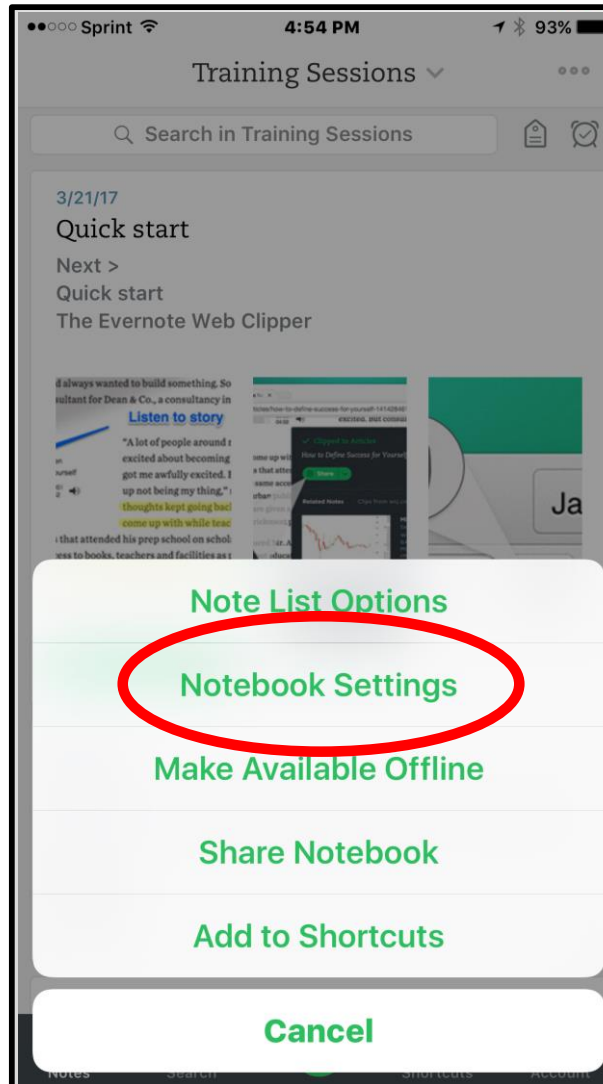
Editing Notebooks



1. Tap Edit

2. Select New Notebook

3. Add notebook name



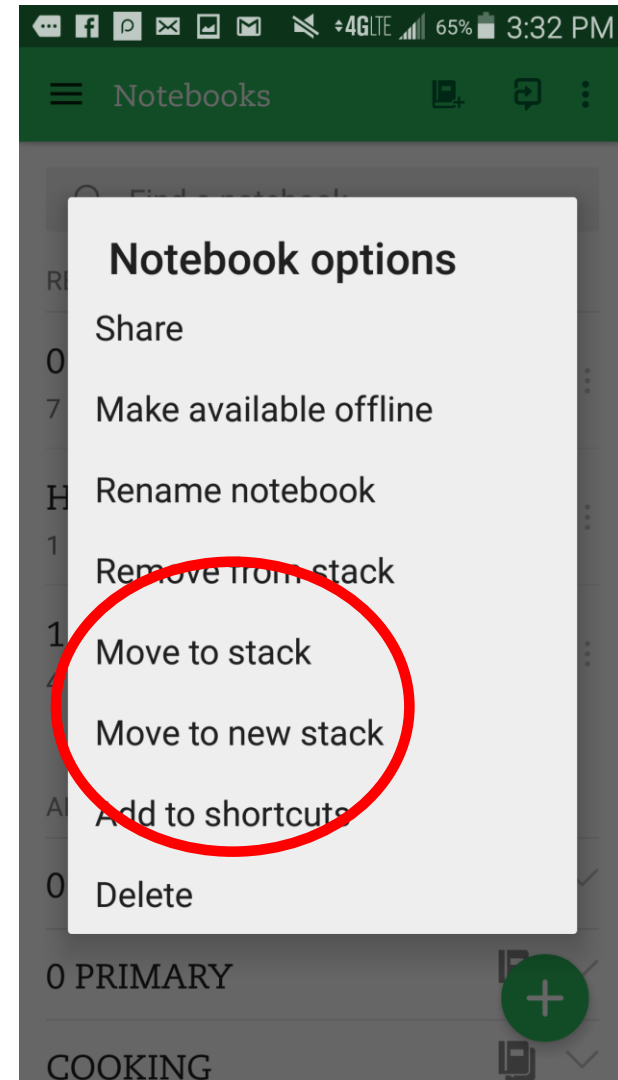
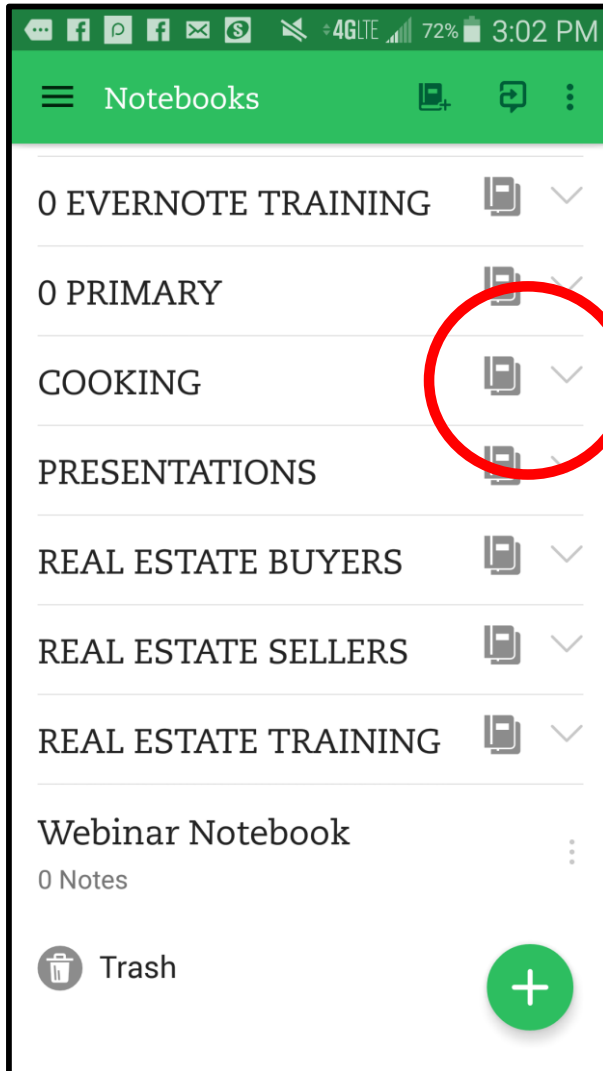
Creating A Stack



1. Press down on notebook

2. Select Move to a new stack

3. Name the stack



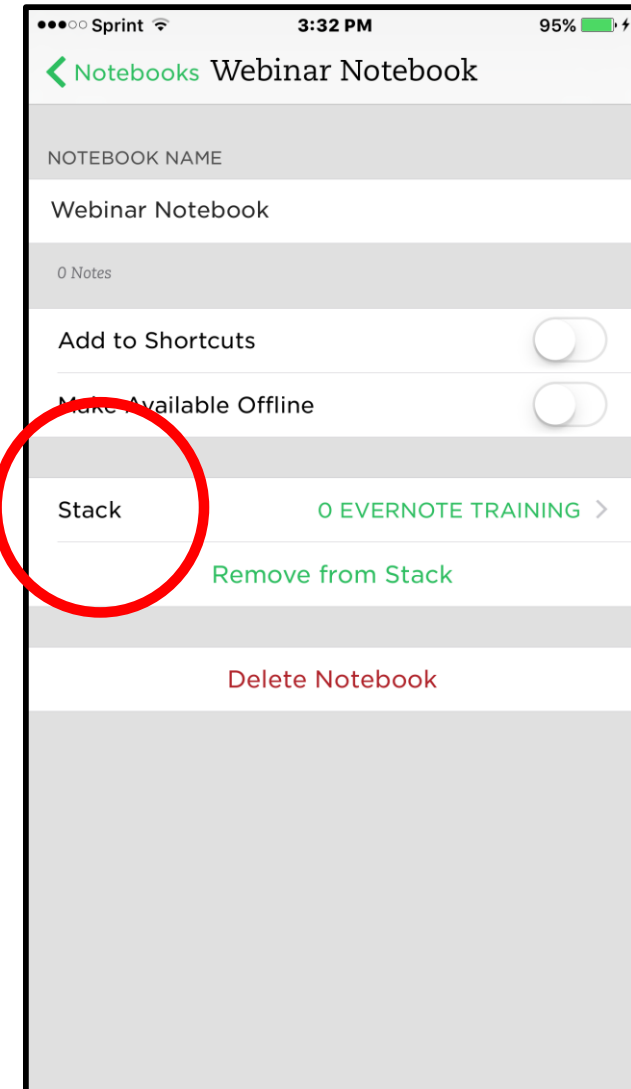
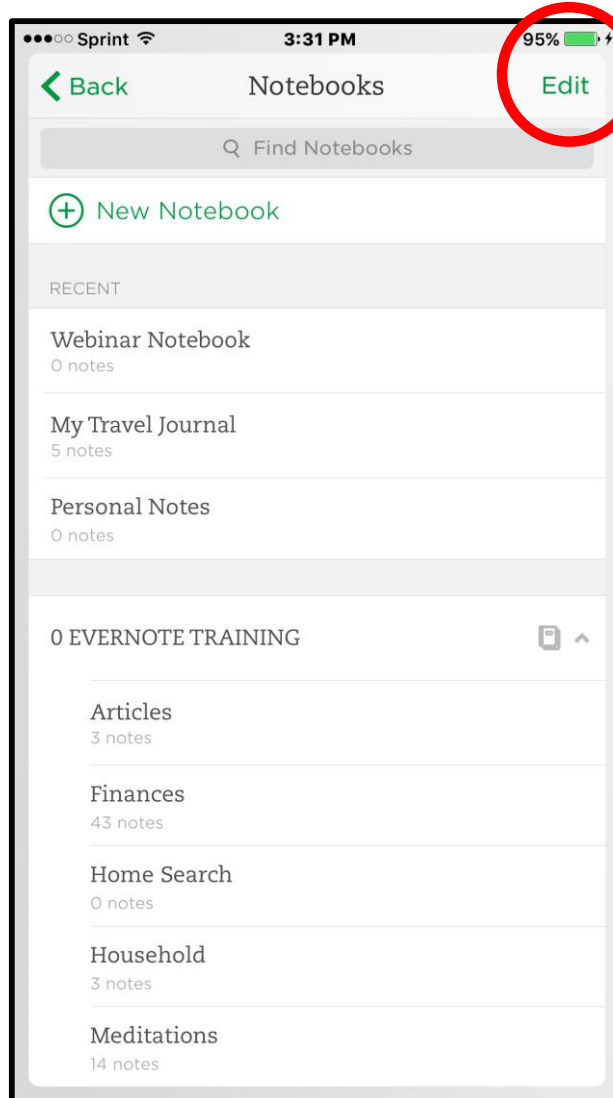
Creating A Stack



1. Tap Edit

2. Select “I” next to Notebook

3. Add to or create a Stack



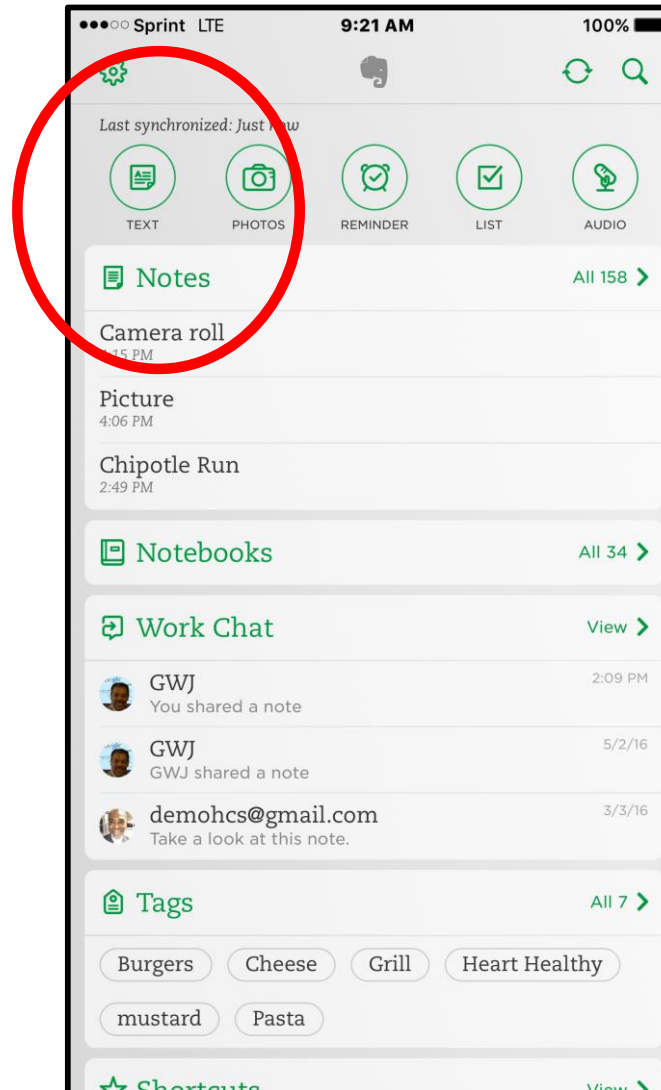
Adding A New Text Note



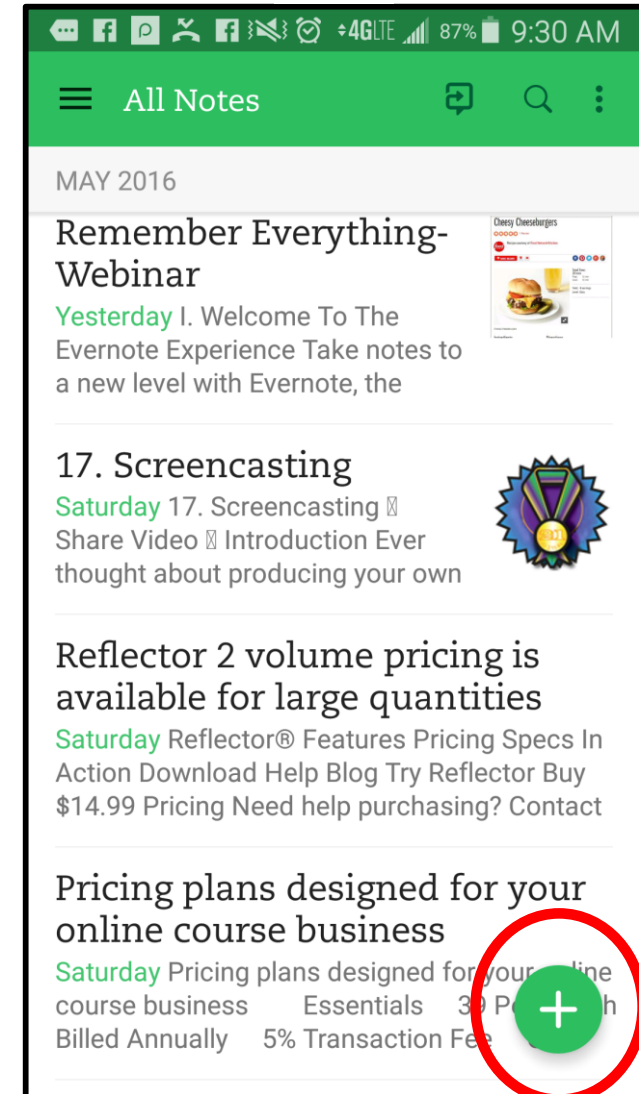
1. Select All Notes then the “+”

- OR -

2. Tap the Text Icon to open



1. For Android, Simply Select All Notes, then tap the “+”

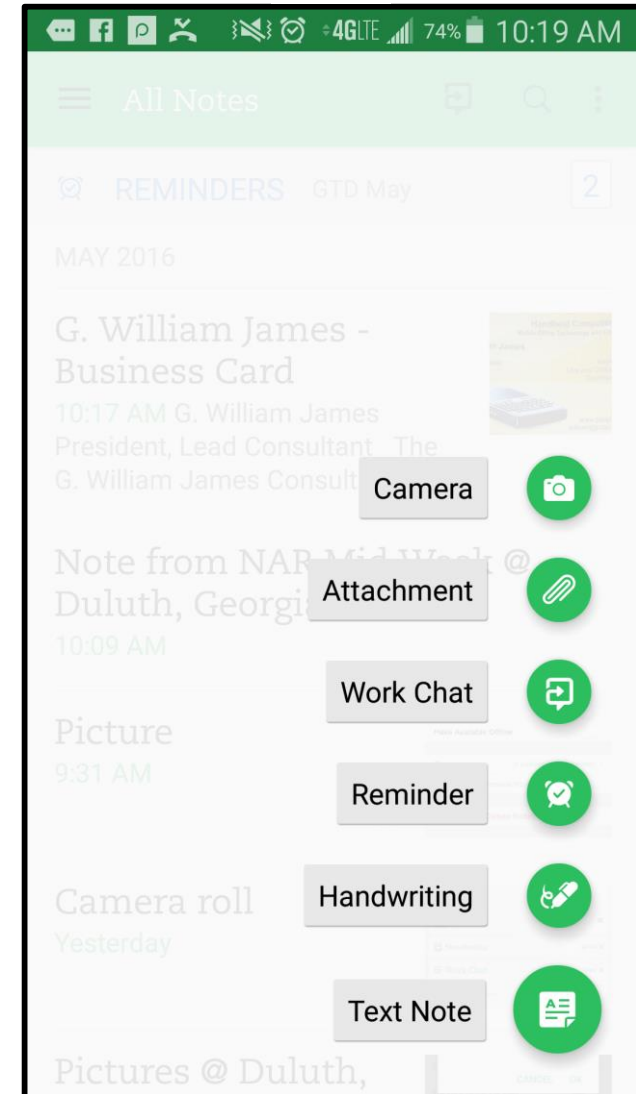
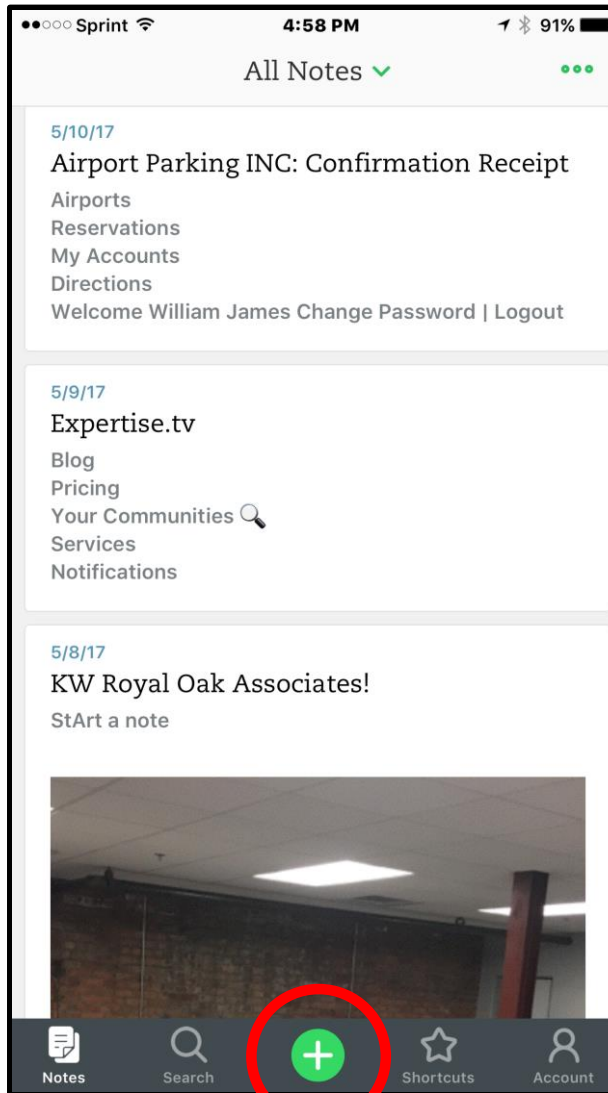


Adding A New Text Note



What can you add to a note?

- Text
- Photos
- Video
- Documents
- Drawings
- Audio Clips
- OR -
- Set reminders
- Speech-To-Text
- Scan a document

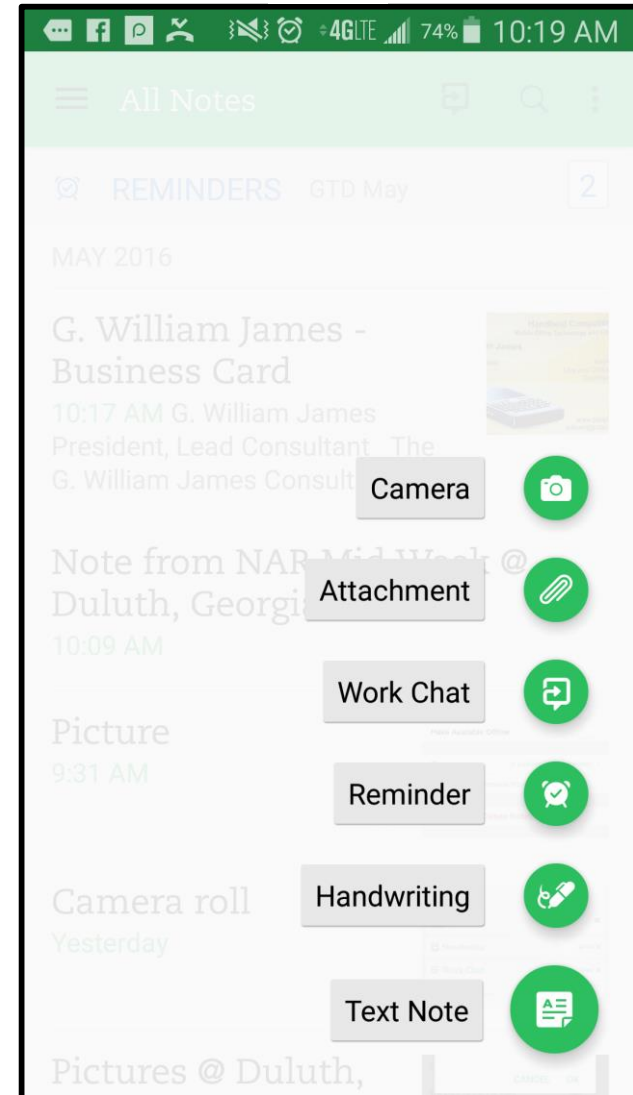
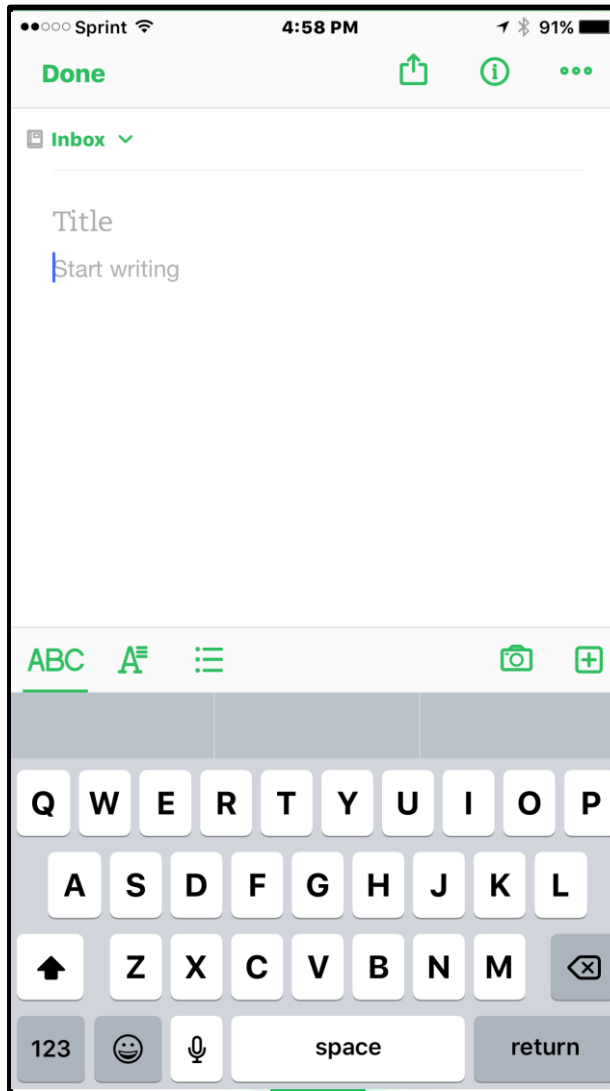


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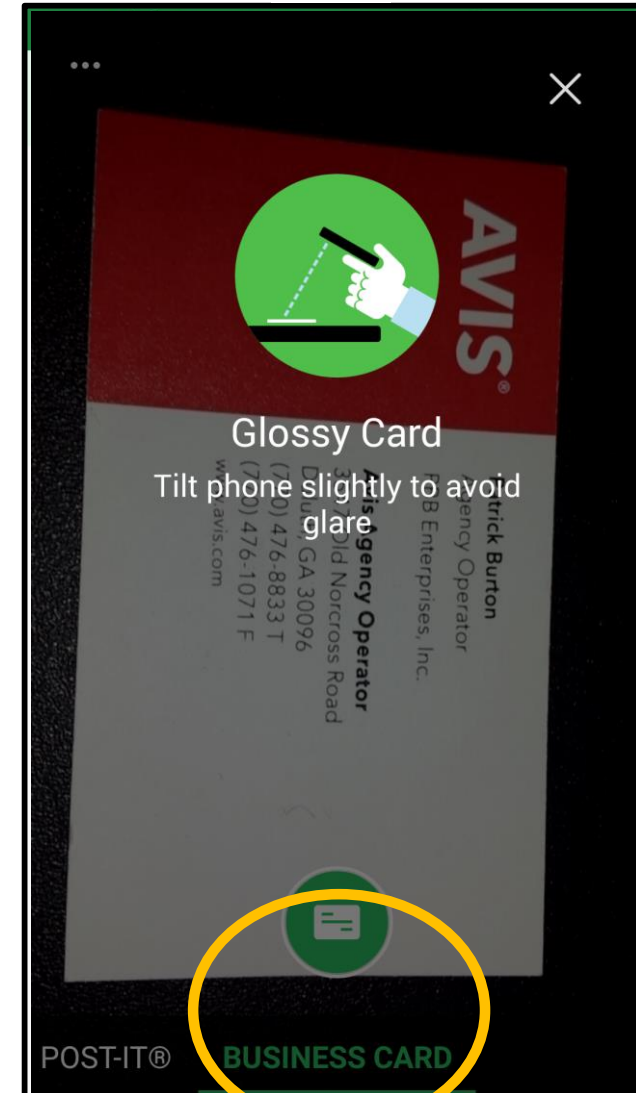
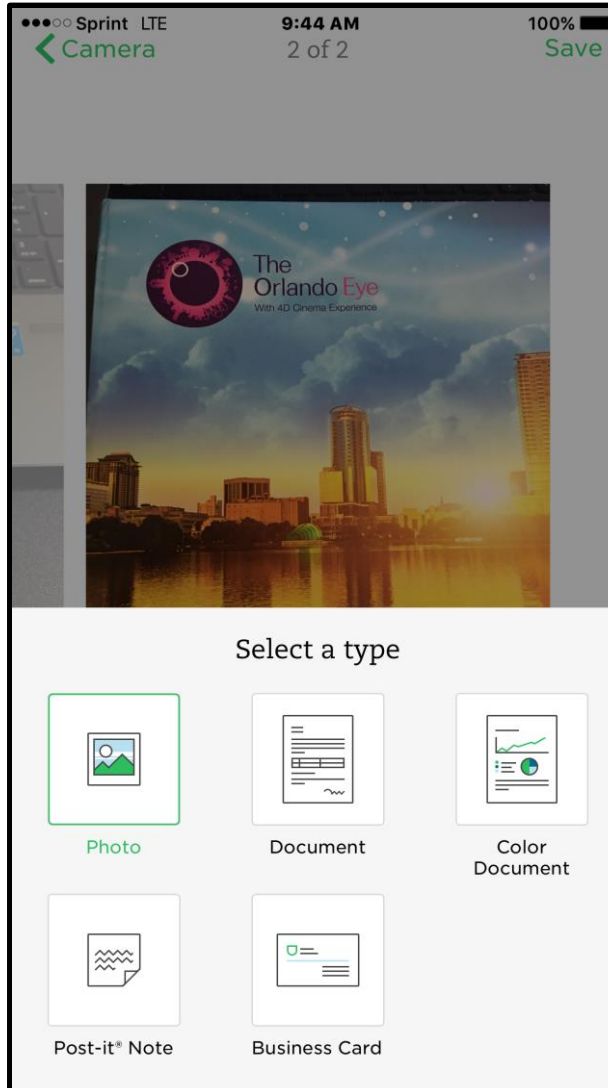


What About The Camera!



A variety of camera options:

- Photo capture
- Post-It Note
- Business Card
- Document Scan
- Take a standard photo and make it part of a note or photo gallery
- Snap a quick item from a bulletin board and save as a Post-It®
- Save a photo of a business card and convert to a contact on the phone
- OCR scan a document and save as a PDF



Adding A Note To A Notebook



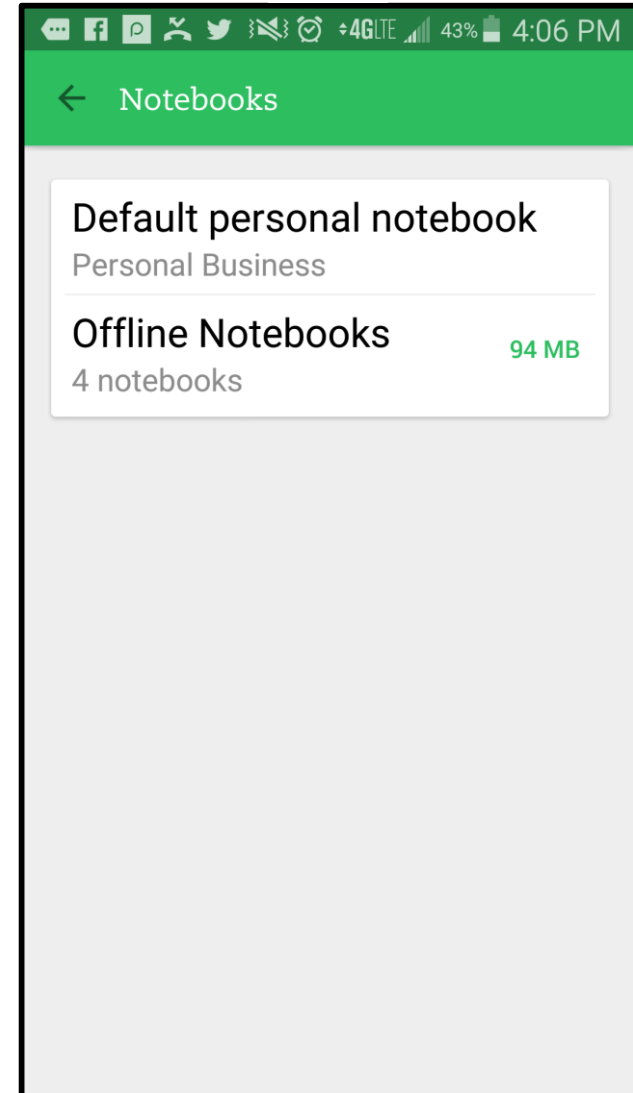
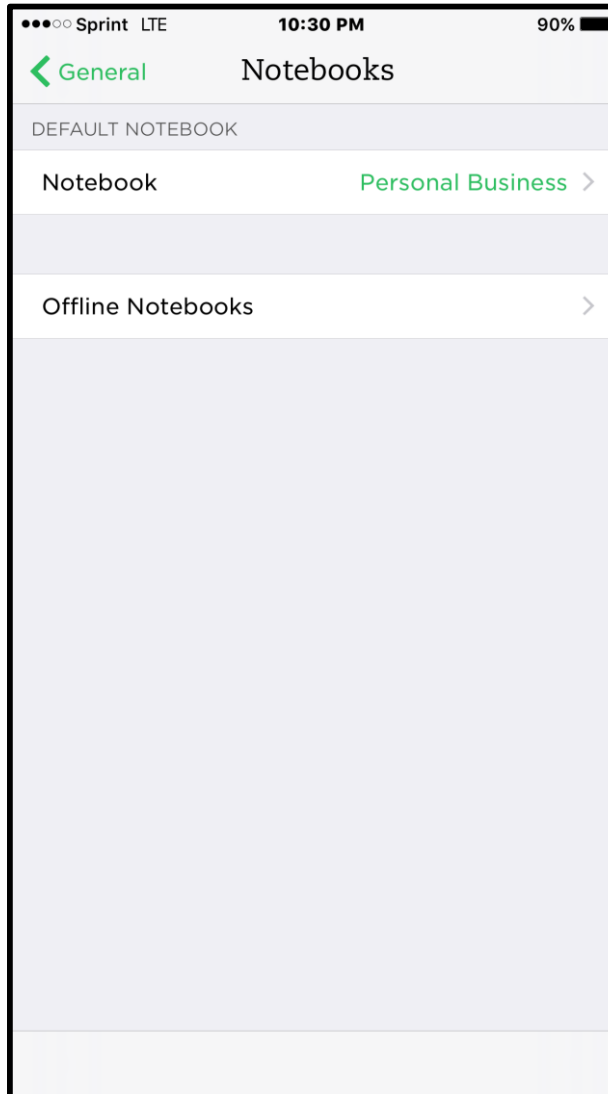
Assign as you create notes, or
set up a default notebook



**Settings > General > Notebooks >
Default Notebook**



**Settings > Notebooks > Default
Personal Notebook**



Deleting A Note



Deleting a note is as simple as creating one...

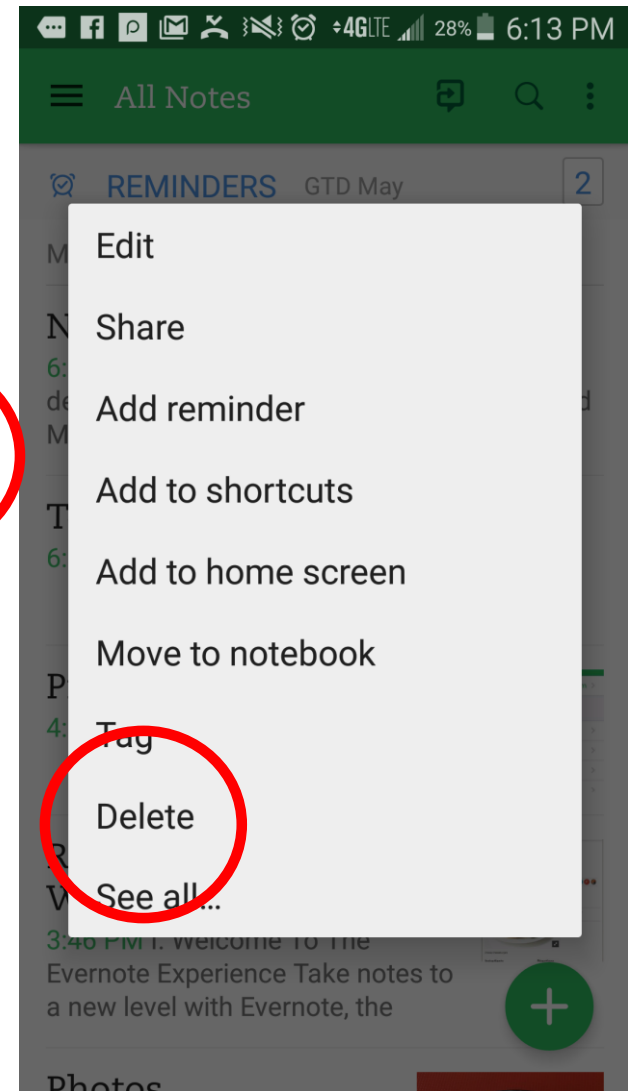
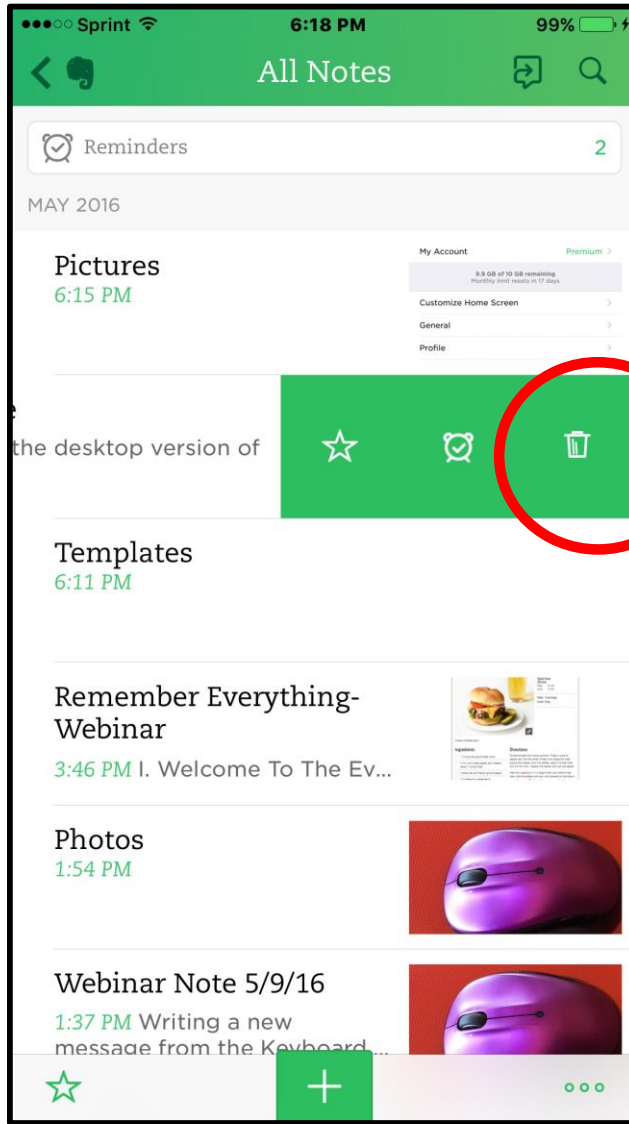


Select note > Slide note to left > Tap trash



Select note> Press down screen > Select Delete

Don't forget to occasionally empty the trash!



A Shortcut List Of Notes



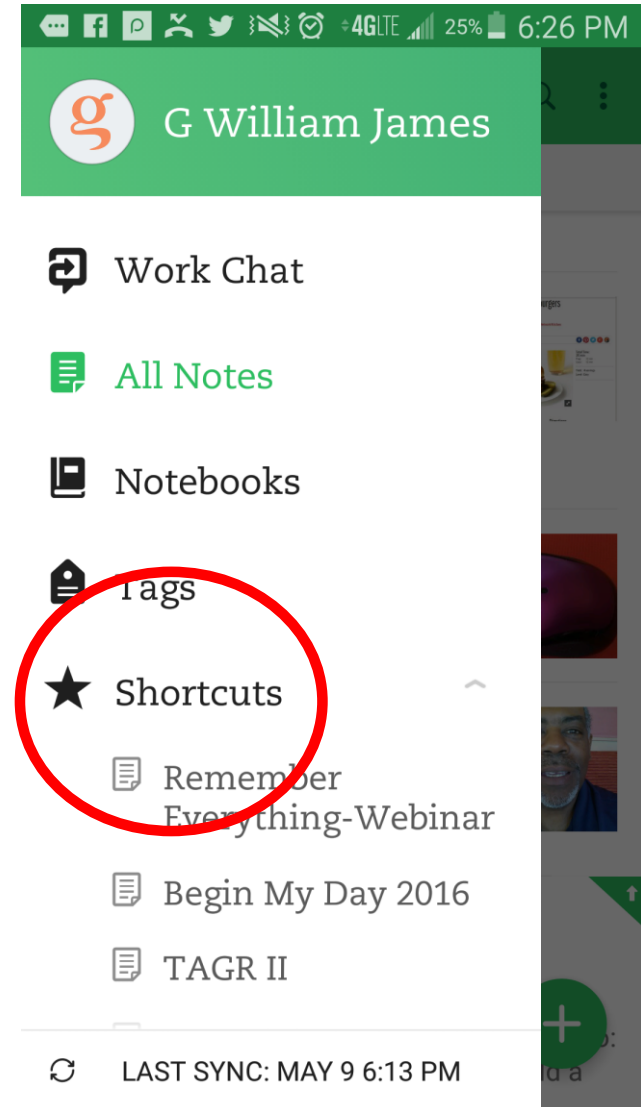
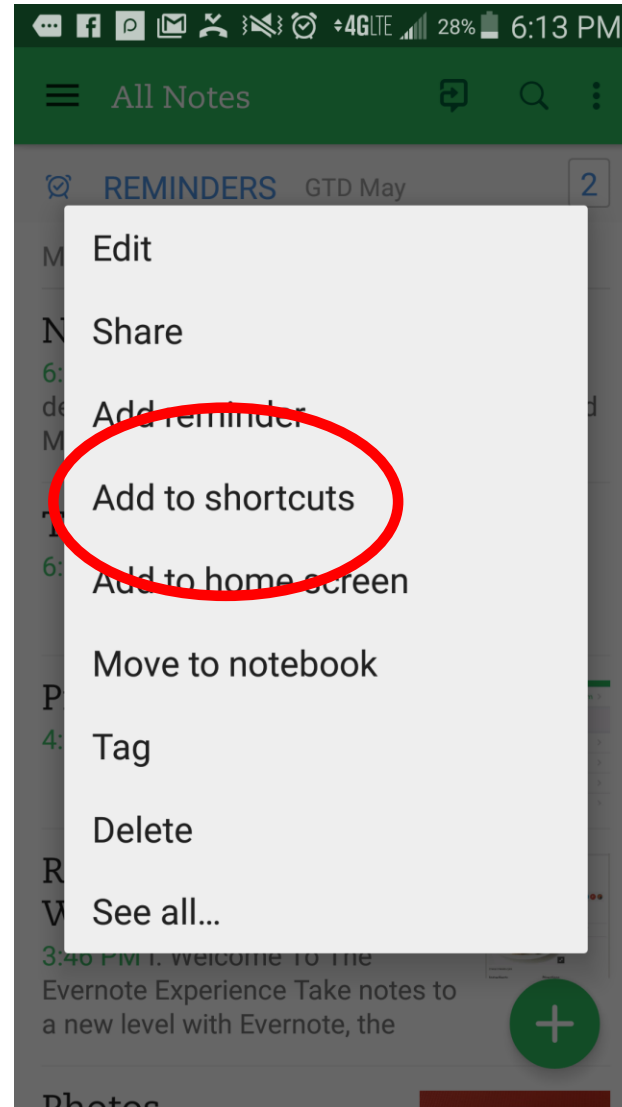
To quickly access notes you are currently using often...



Select a note > Press down on screen > Select Add to shortcuts

To access shortcuts, tap the star on the home screen

When the note is no longer needed for quick access, simply reverse the process, keeping only the notes you use regularly on the list.



A Shortcut List Of Notes

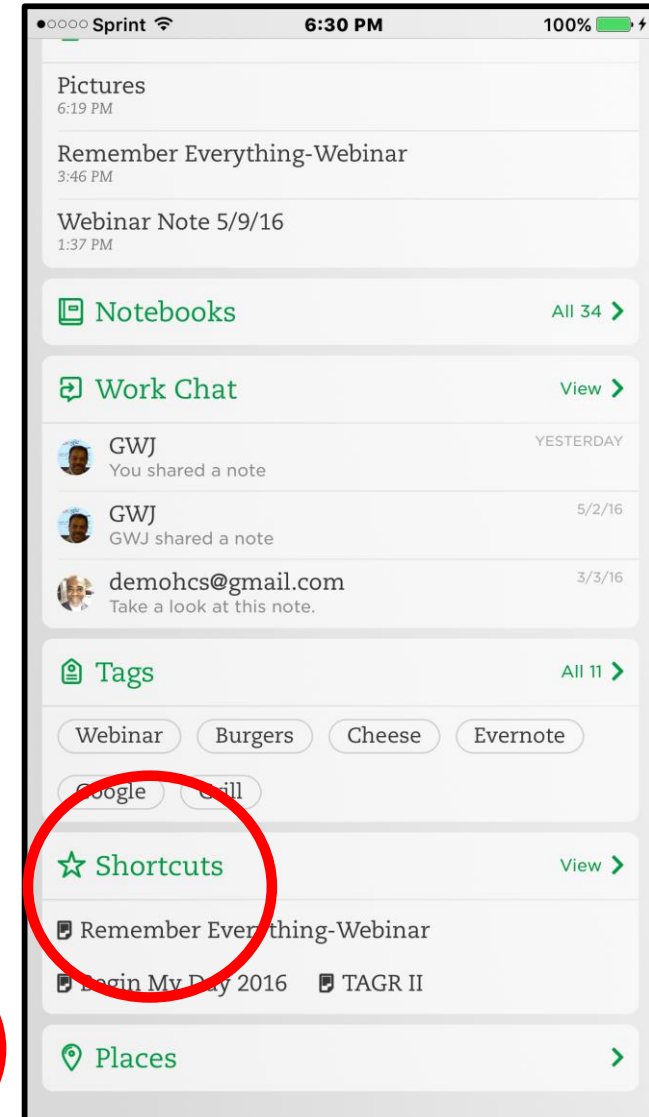
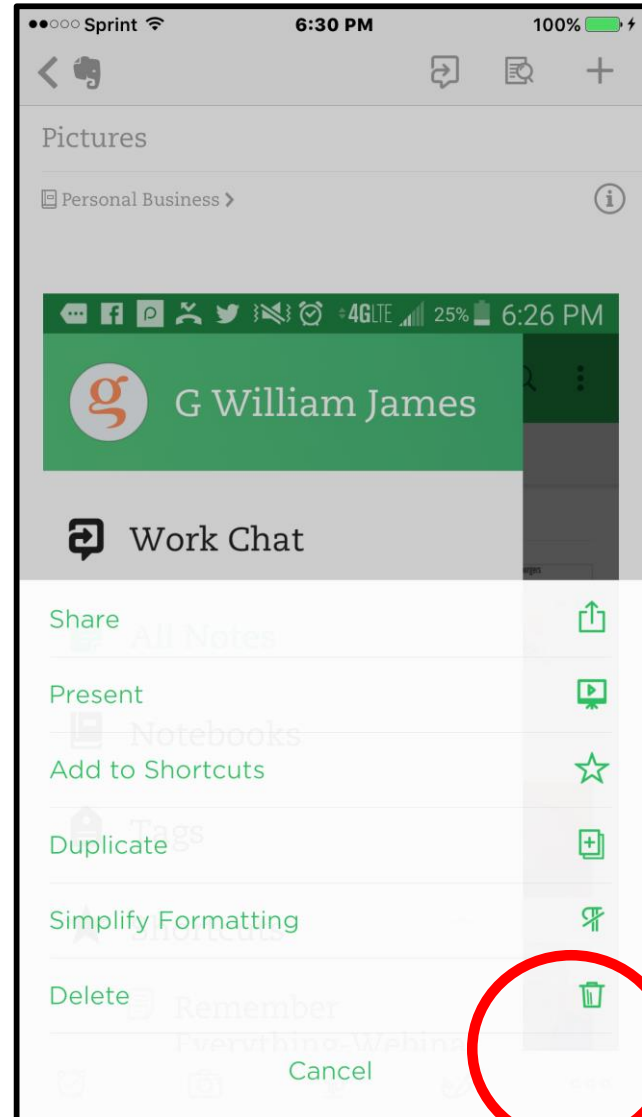


To quickly access notes you are currently using often...



Open a note > Tap the 3 dots below > Select Add to shortcuts

To access shortcuts, tap the star on the home screen



Adding Tags To Notes



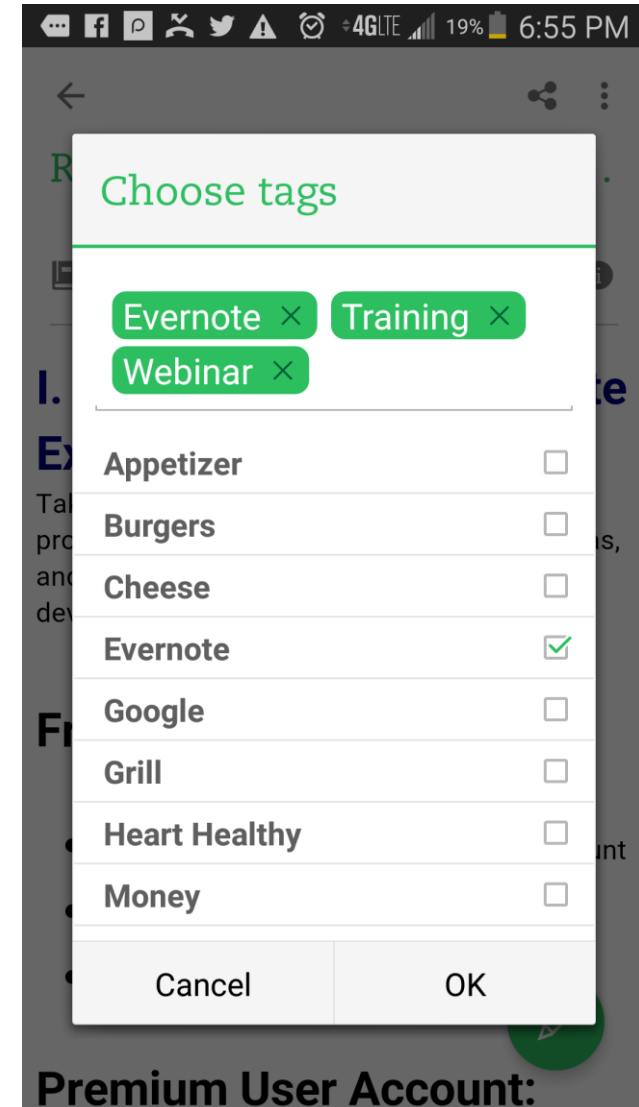
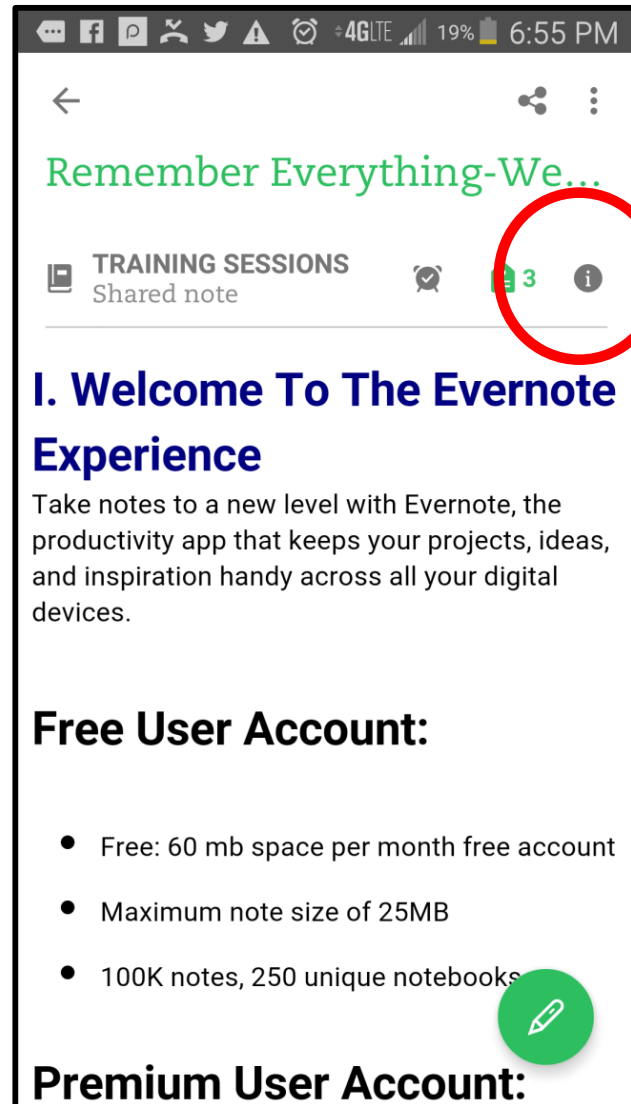
Adding tags make any note globally searchable from any notebook...



Open a note > Tap the “i” icon > Edit Tags > Choose or add tags

The list of tags are available for all notes regardless of notebooks. You can add hundreds!

Make your most used tags part of your Shortcuts list, like your notes



Adding Locations



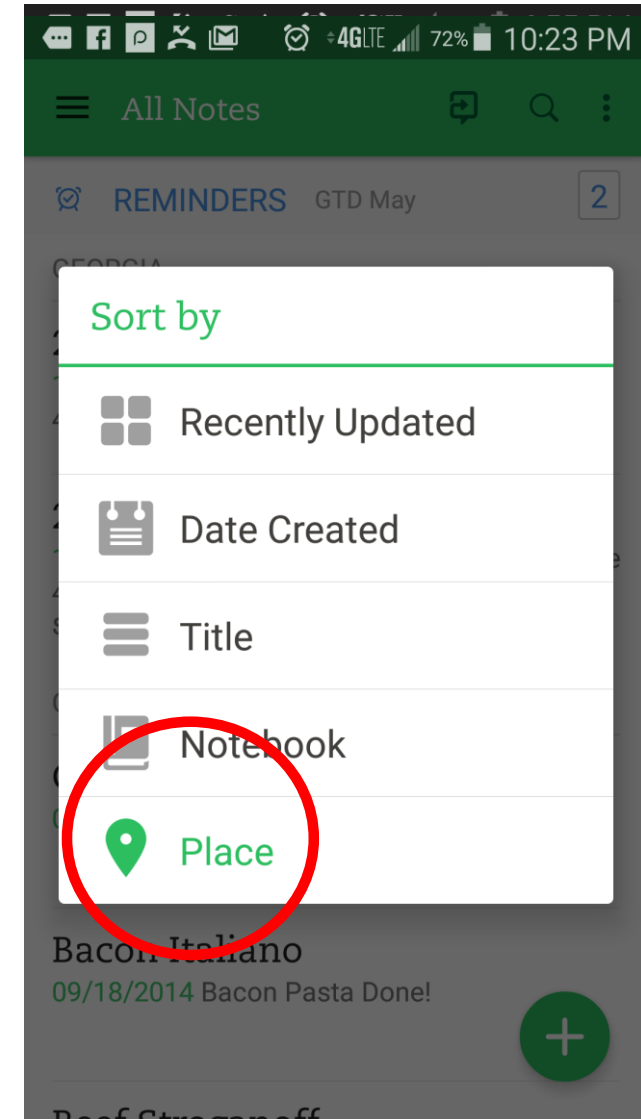
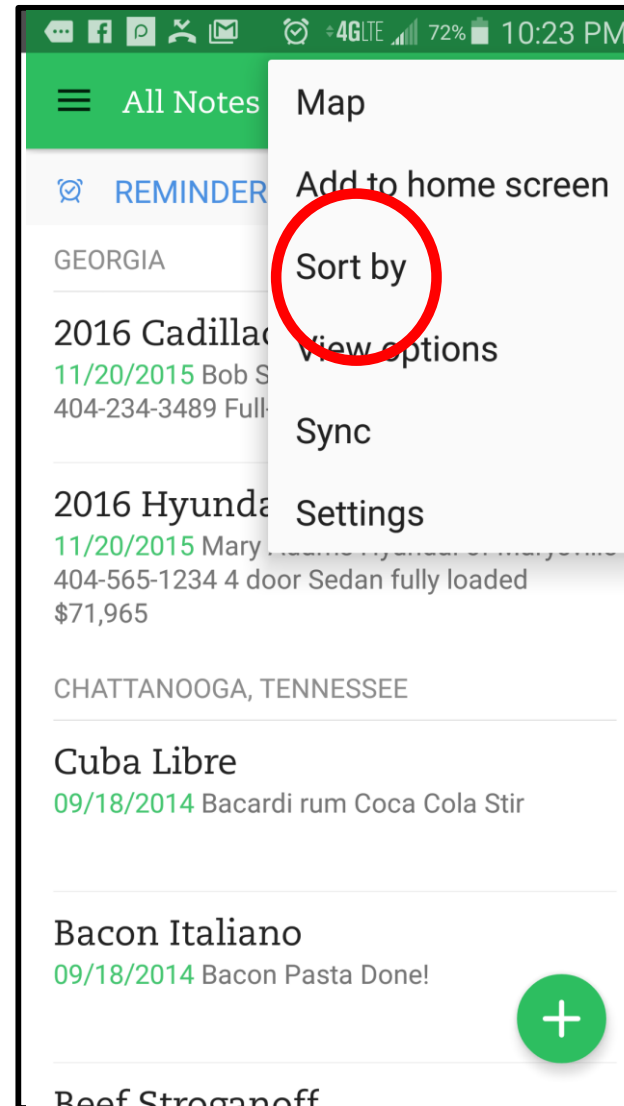
The Atlas is the location aware feature on mobile devices



Open a note > Tap vertical dots > Select sort by > Choose place

The notes will sort by the location you were when it was created

You can also search by a location name, which will do the same. This method will also search tags.



Adding Locations



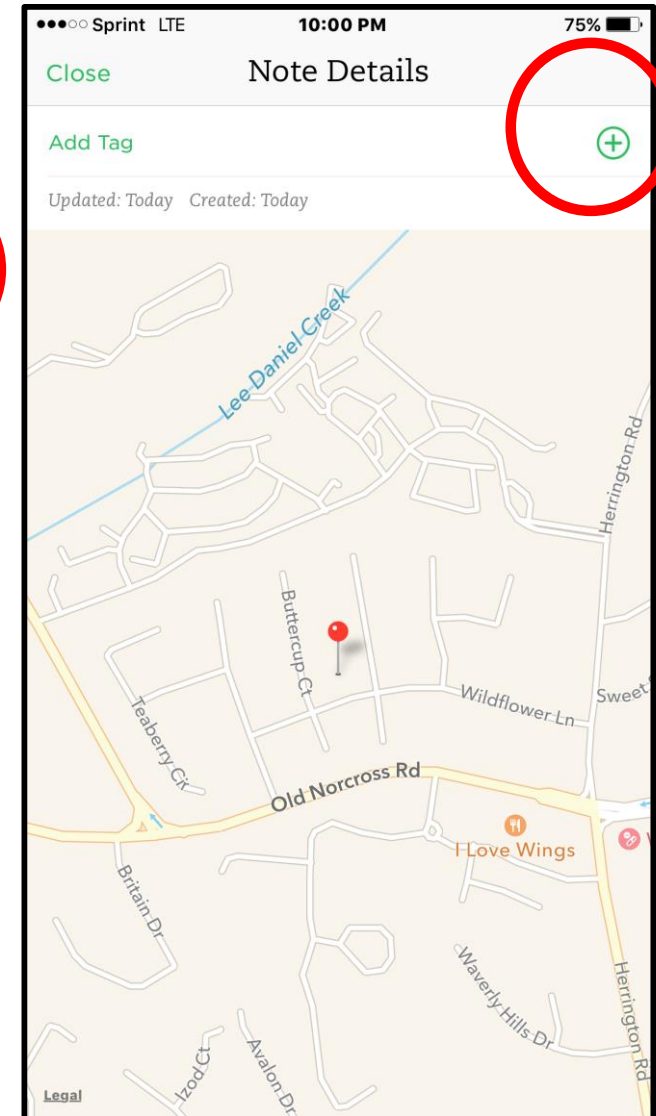
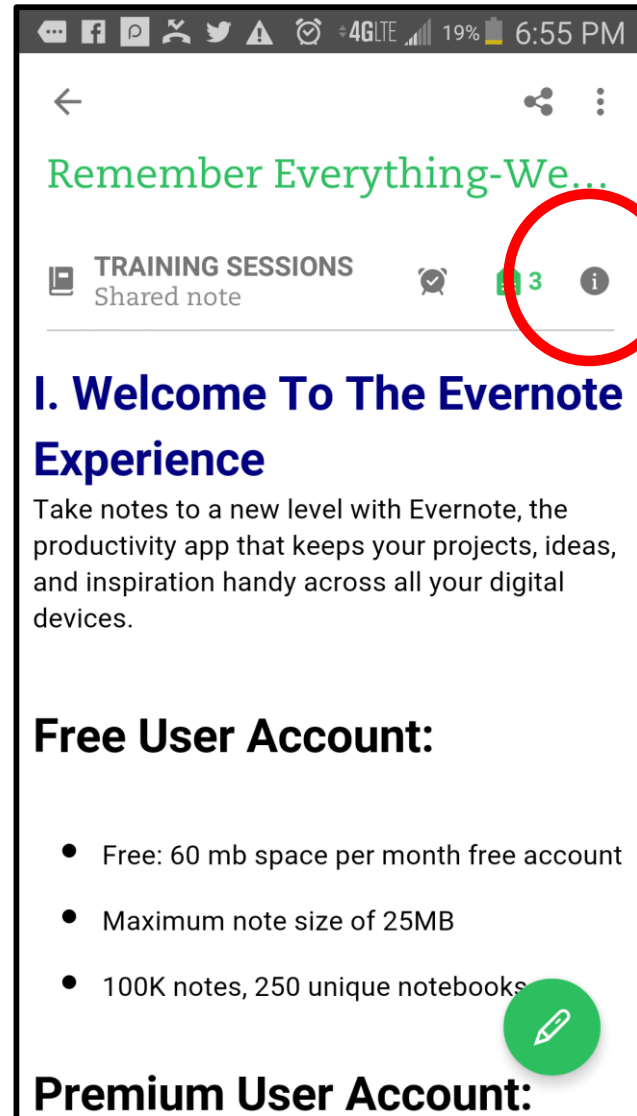
The Atlas is the location aware feature on mobile devices



Open a note > Tap the “i” icon > Tap Screen, zoom in > Drop Pin

The Atlas records each note’s location and searches the calendar for events scheduled at that moment

Notes can be searched by location!



Email and Evernote



Use your Evernote email address to forward straight from the inbox to a note.

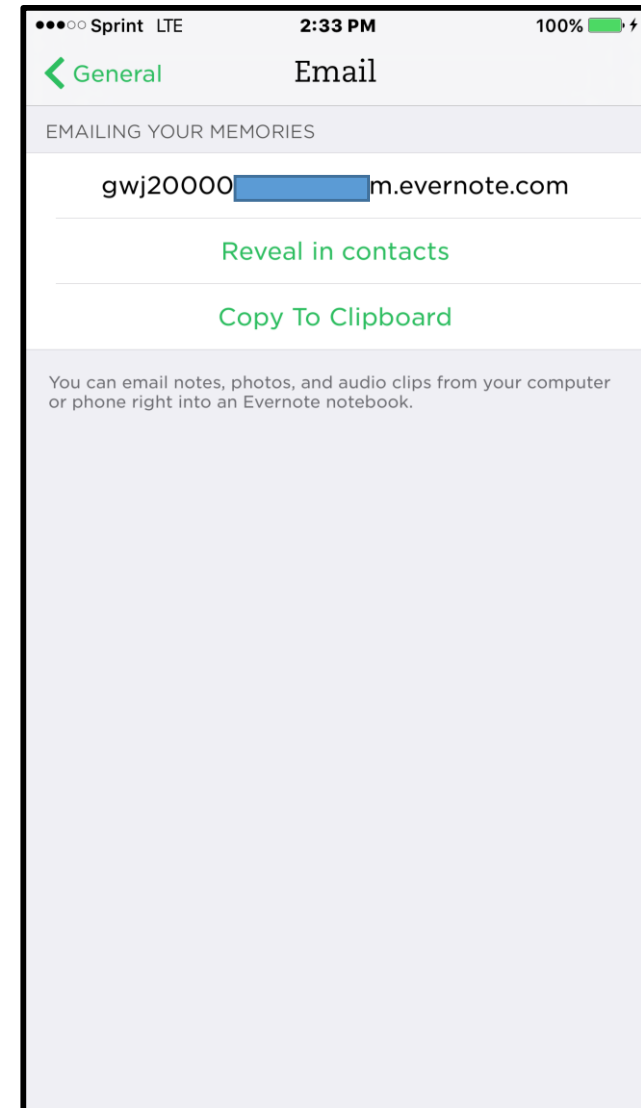
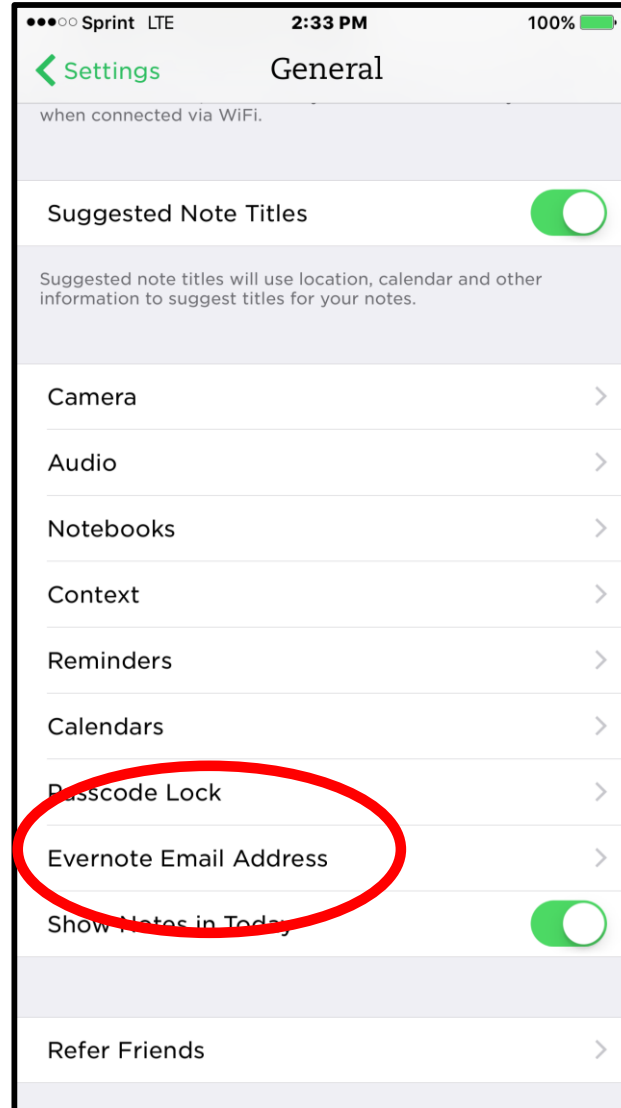


Open Settings > Select General > Display address > copy to contacts

You can set certain emails to be forwarded to Evernote using the Filter feature in your email acct.

Add notifiers to email forwarding @notebook or #tag !reminder

Subj: meeting @business #sales !tomorrow



Email and Evernote



Use your Evernote email address to forward straight from the inbox to a note.

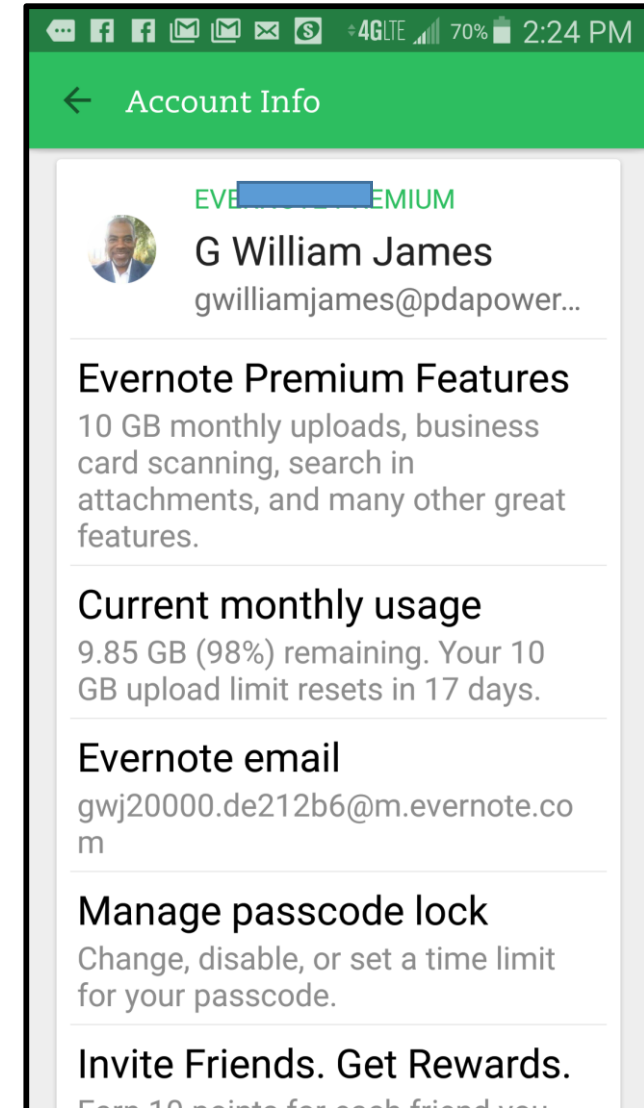
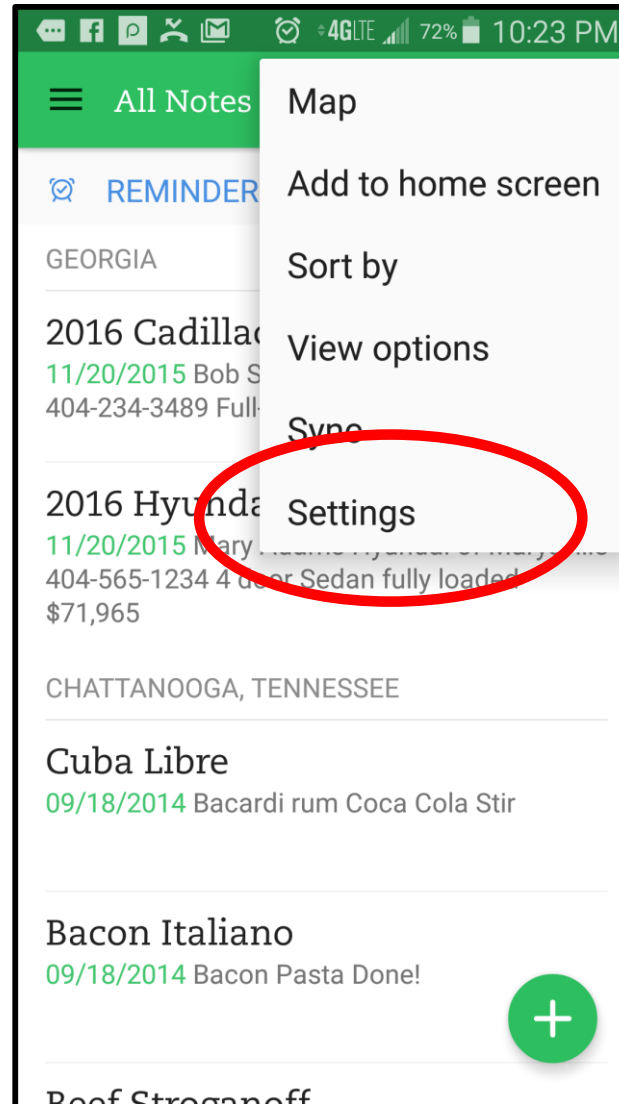


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Add notifiers to email forwarding @notebook or #tag !reminder

Subj: meeting @business #sales !tomorrow



Using Templates

Template - Real Estate: Client Information copy

Name	
Phone Number	
Email Address	
Street Address	
Mailing Address	
Social Media Contacts	
Spouse/Partner	

Type of properties you're interested in:

- ☐ Single family
- ☐ Multi family
- ☐ Apartment
- ☐ Condo
- ☐ Tenancy-in-Common

Number of bedrooms

- ☐ Studio
- ☐ 1
- ☐ 2
- ☐ 3+

Neighborhoods you're interested in:

- ☐ Embarcadero
- ☐ Financial District
- ☐ South of Market
- ☐ Nob Hill
- ☐ Hayes Valley
- ☐ Duboce Triangle

Pre-Close Checklist Template

Template - Real Estate: Document Checklist copy

Loan Application

- ☐ Copies of identification
- ☐ Bank statements
- ☐ Credit reports
- ☐ Outstanding loan statements
- ☐ Tax return

Escrow

- ☐ Offer
- ☐ Disclosures
- ☐ Contingencies
- ☐ Building inspection
- ☐ Water report
- ☐ Termite inspection

Closing

- ☐ Deed
- ☐ Mortgage note
- ☐ HUD documents

Listings Template

Template - Real Estate: Potential Properties copy

Address:

Asking:

Link:

Notes:

Address:

Asking:

Link:

Notes:

Address:

Asking:

Link:

Notes:

Listings Template

Template - Real Estate: Meeting Notes copy

Meeting Date/Time:

Meeting Purpose:

Meeting Notes:

Action Items:

Meeting Date/Time:

Meeting Purpose:

Meeting Notes:

Action Items:

Meeting Date/Time:

Meeting Purpose:

Meeting Notes:

Action Items:

Sharing To Workgroups



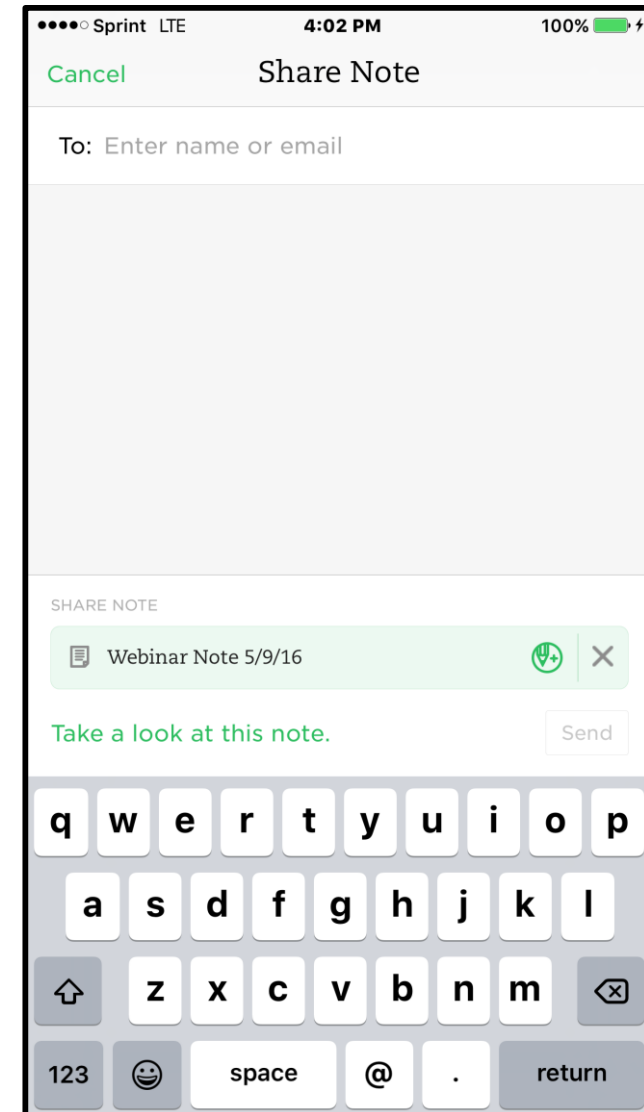
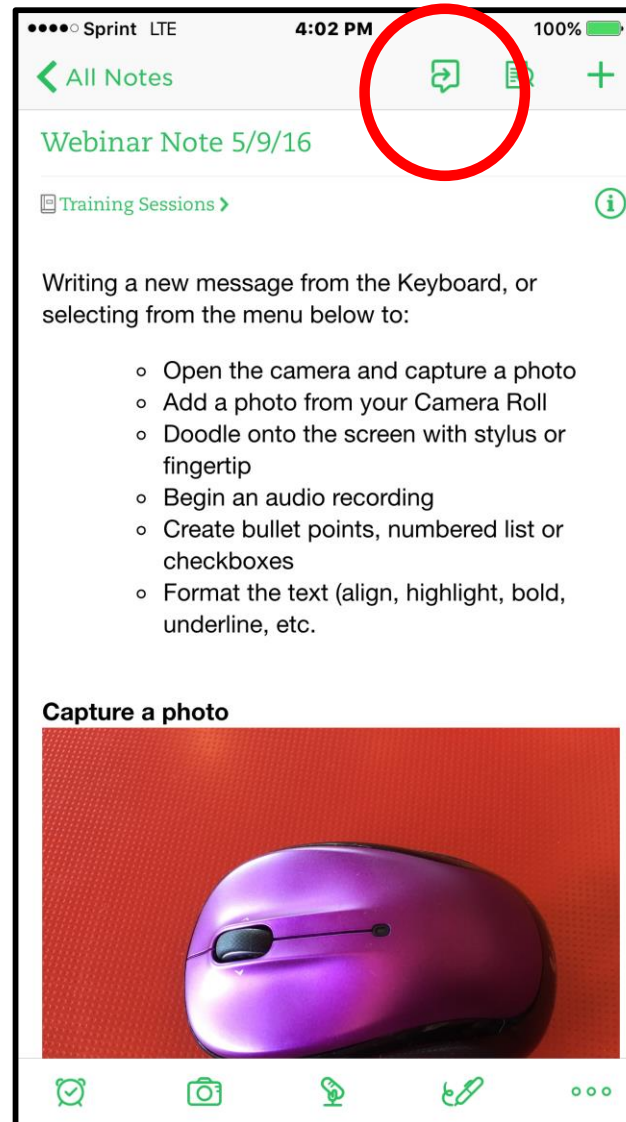
There are more than a few ways by which you can share information directly from your Evernote



Share Note by email or Workgroup:

Open a note > Tap share icon > Type email address > Send

Recipients do not have to be EN users to open and receive notes. If the email address is an EN account it will create a new note as a live note, that updates with everyone with whom the note is shared. You can give others editing rights.



Sharing To Workgroups



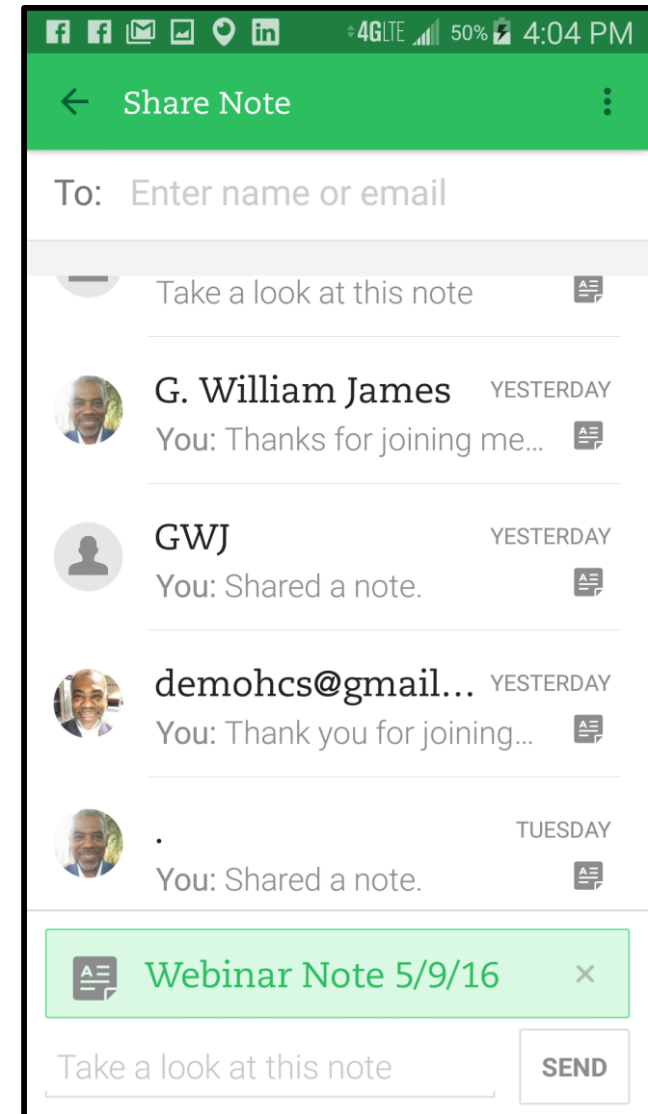
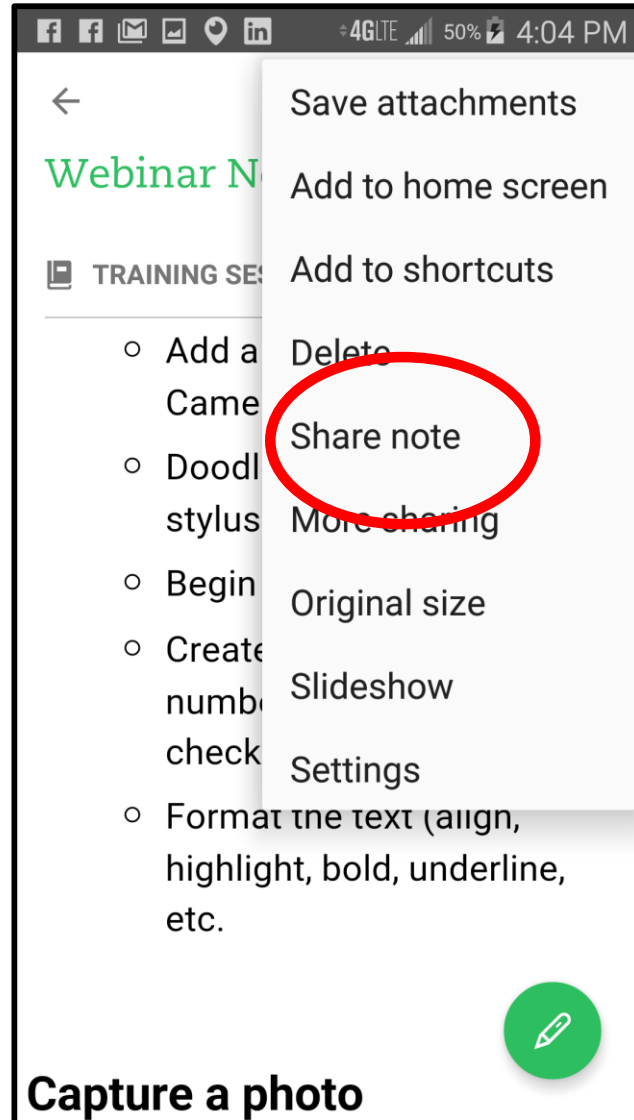
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Other Sharing Features



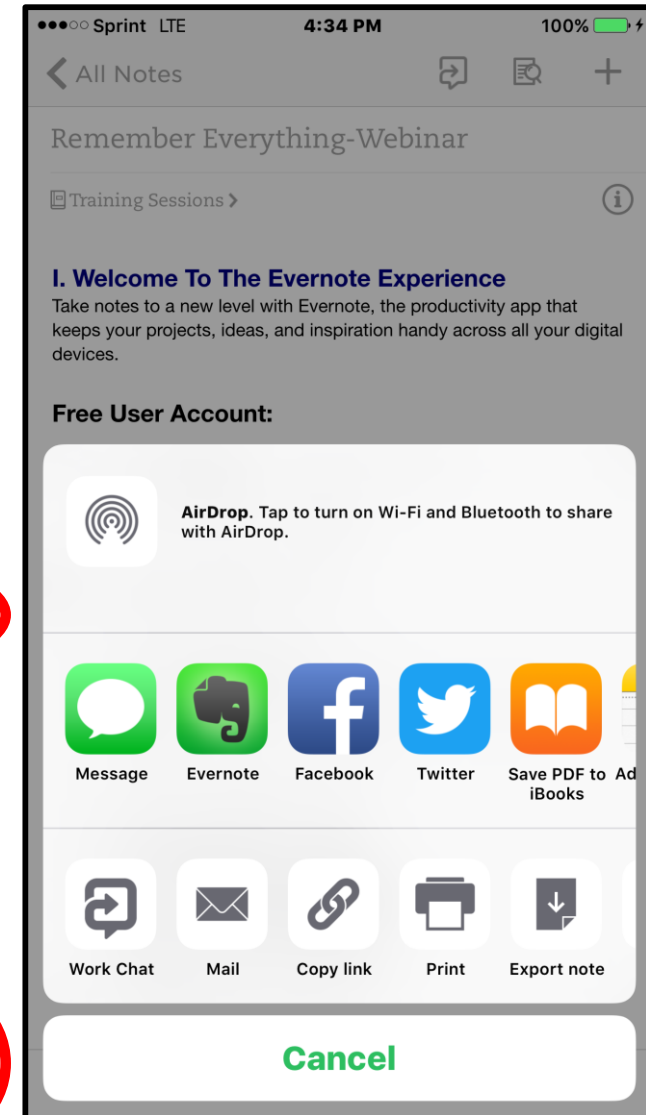
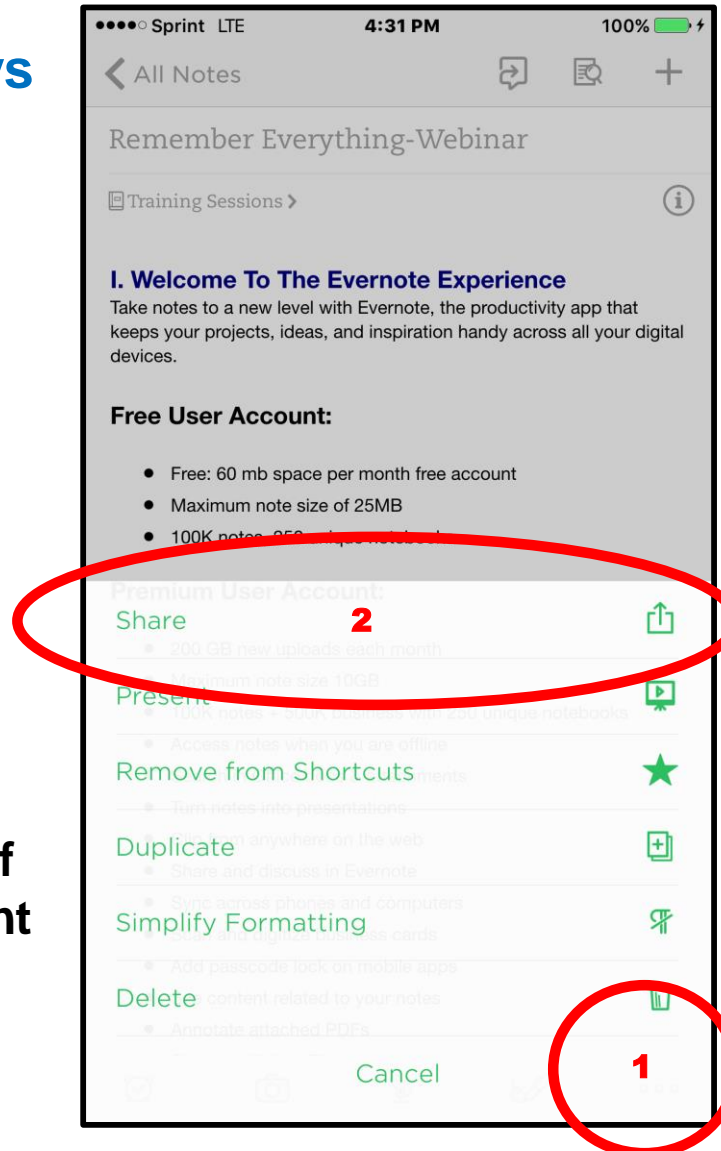
There are more than a few ways by which you can share information directly from your Evernote



Share notes by other media:

Open a note > Tap three dots > Select Share > Select app to use

Recipients do not have to be EN users to open and receive notes. If the email address is an EN account it will create a new note.



Other Sharing Features



There are more than a few ways by which you can share information directly from your Evernote



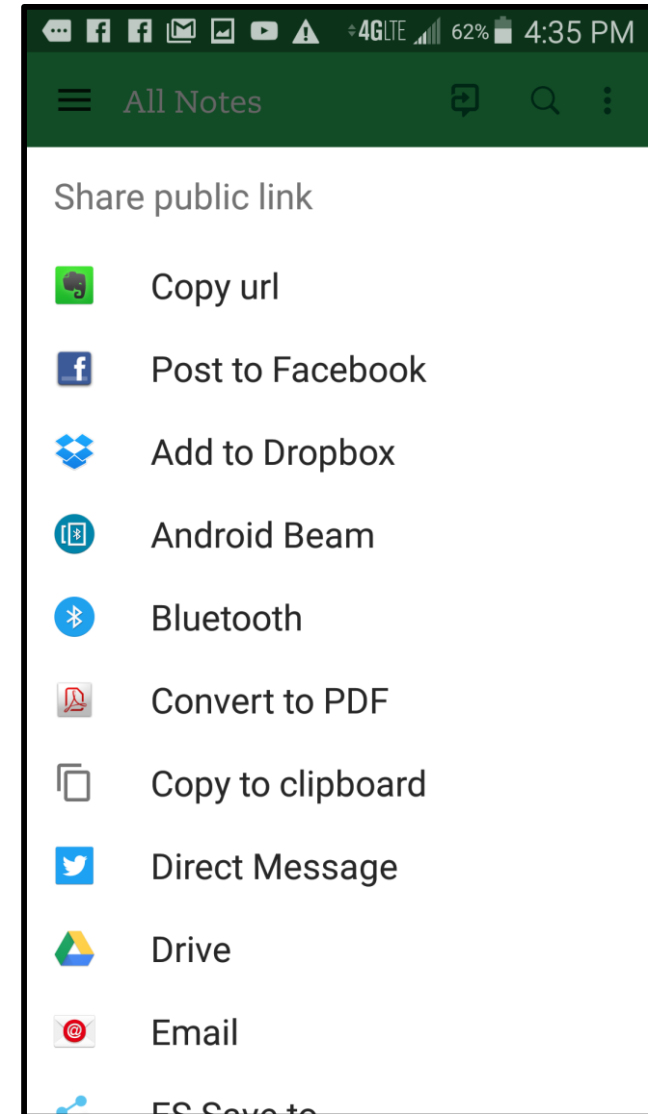
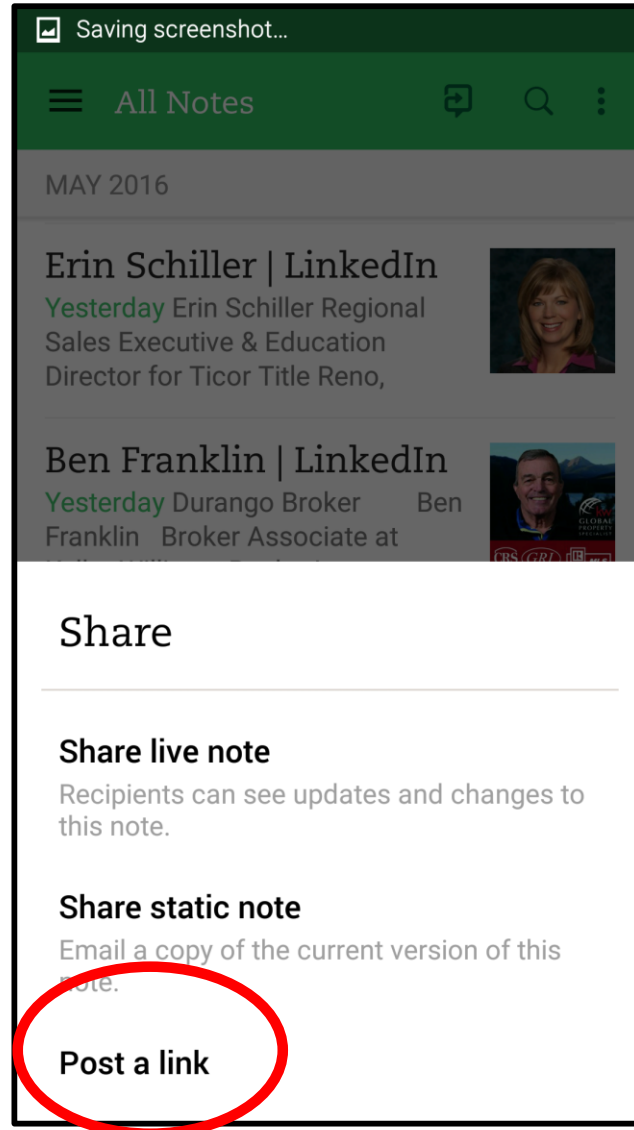
Share notes by other media:

Press down onto note > Select Share > Choose one of the 3 methods to share, ie Post a link

Share live note- Notes update with recipients as you edit information

Share static note- the note as it is delivered at the moment stays

Post a link- use messaging or other apps on device to share notes



Tips & Useful Features



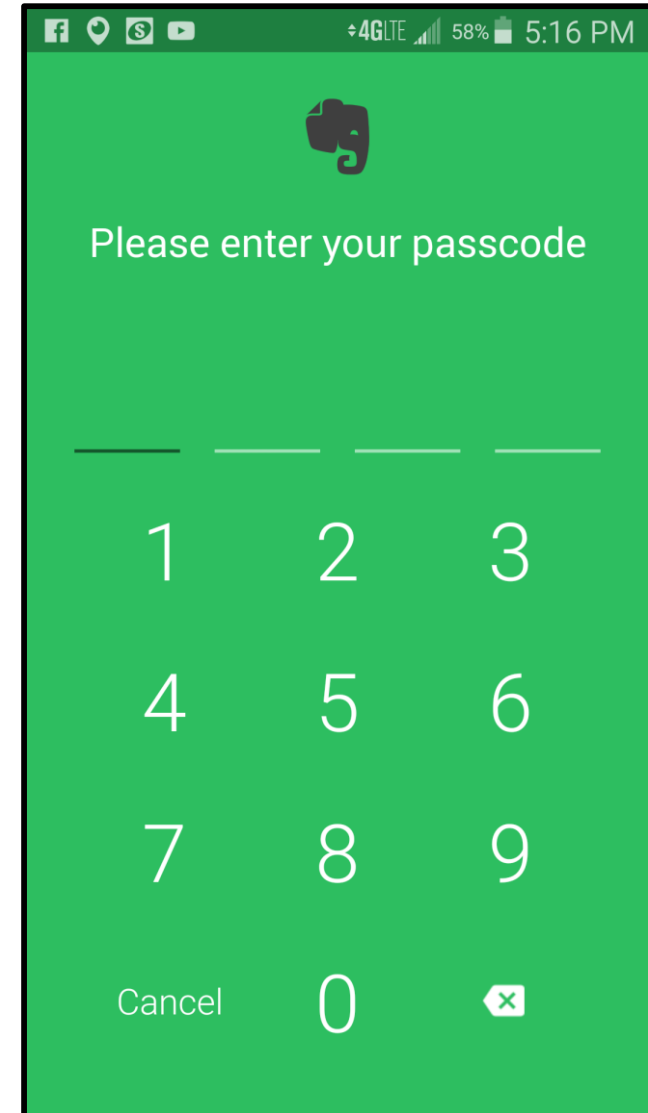
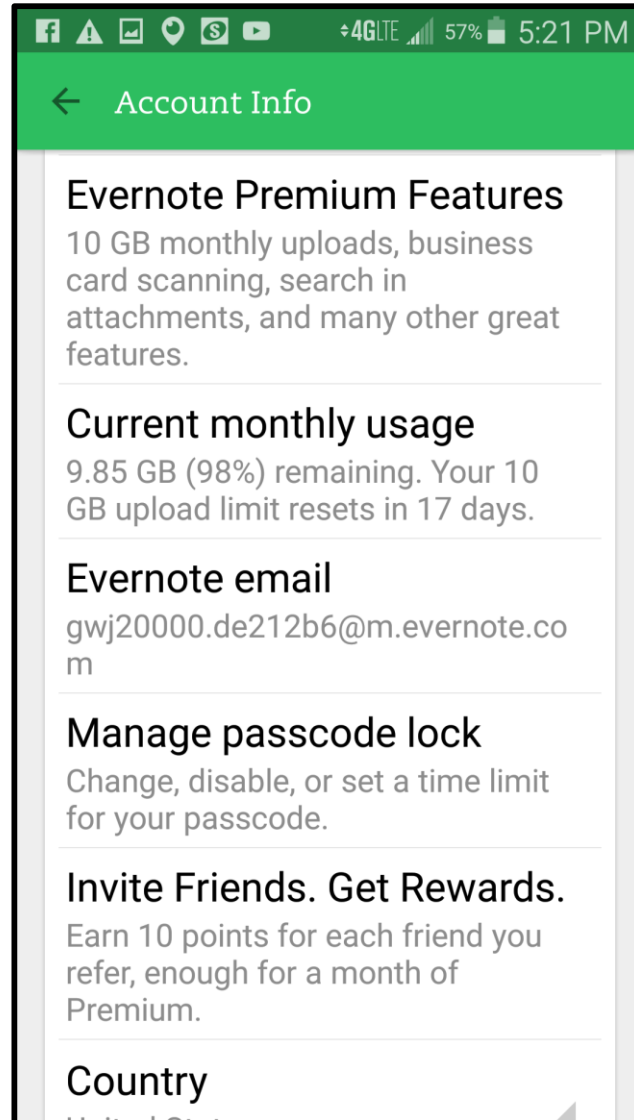
Power users of Evernote enjoy some great secret features and tips- now so can you!



**Set a passcode to your account:
-A Premium account feature**

Press three dots > Select Settings > Account Info > Set up passcode lock

Share live note- Notes update with recipients as you edit information
Share static note- the note as it is delivered at the moment stays
Post a link- use messaging or other apps on device to share notes



Tips & Useful Features

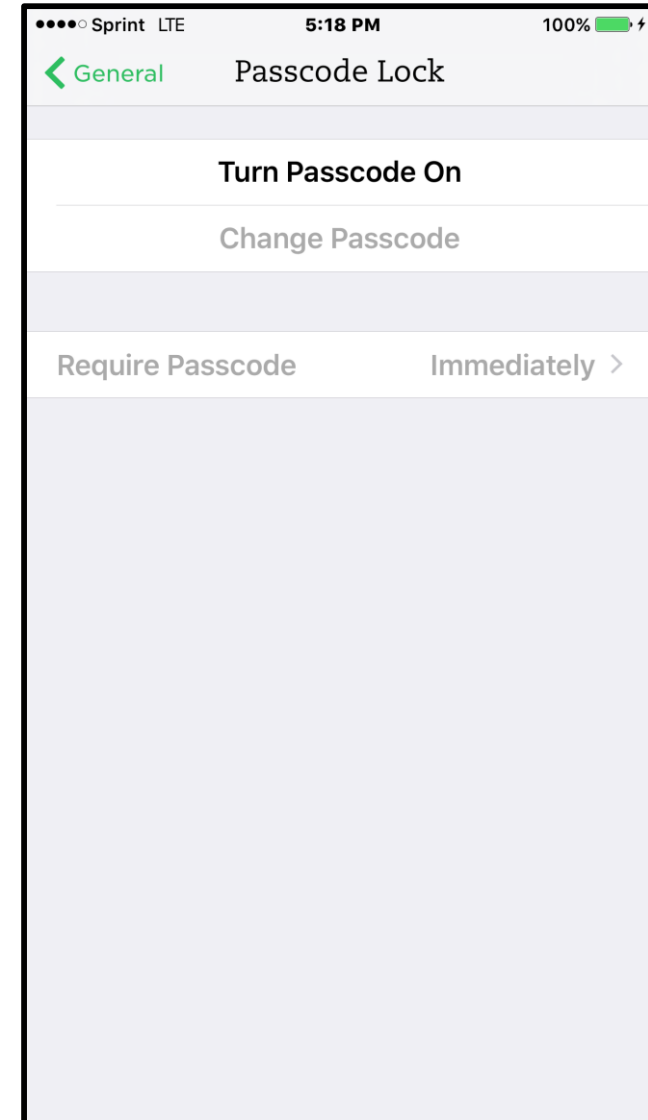
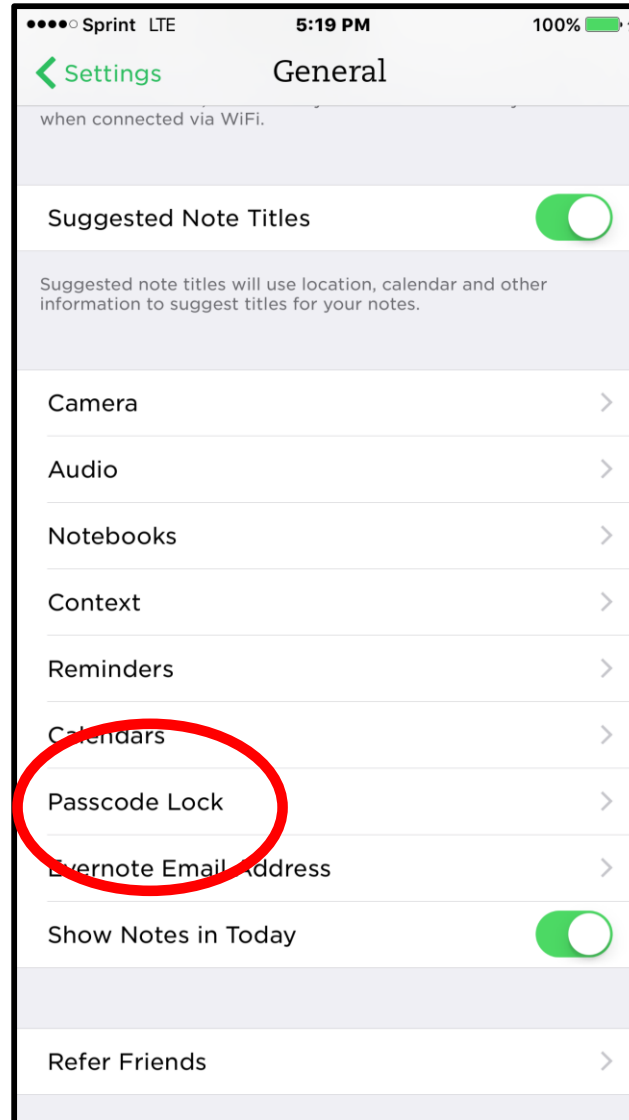


Power users of Evernote enjoy some great secret features and tips- now so can you!



**Set a passcode to your account:
-A Premium account feature**

**Tap Settings gear> Select General >
Select Passcode Lock > Turn
Passcode On**



Tips & Useful Features



If you need to encrypt very sensitive data, you can do so within a note. At this time you may not encrypt a note itself or a notebook.

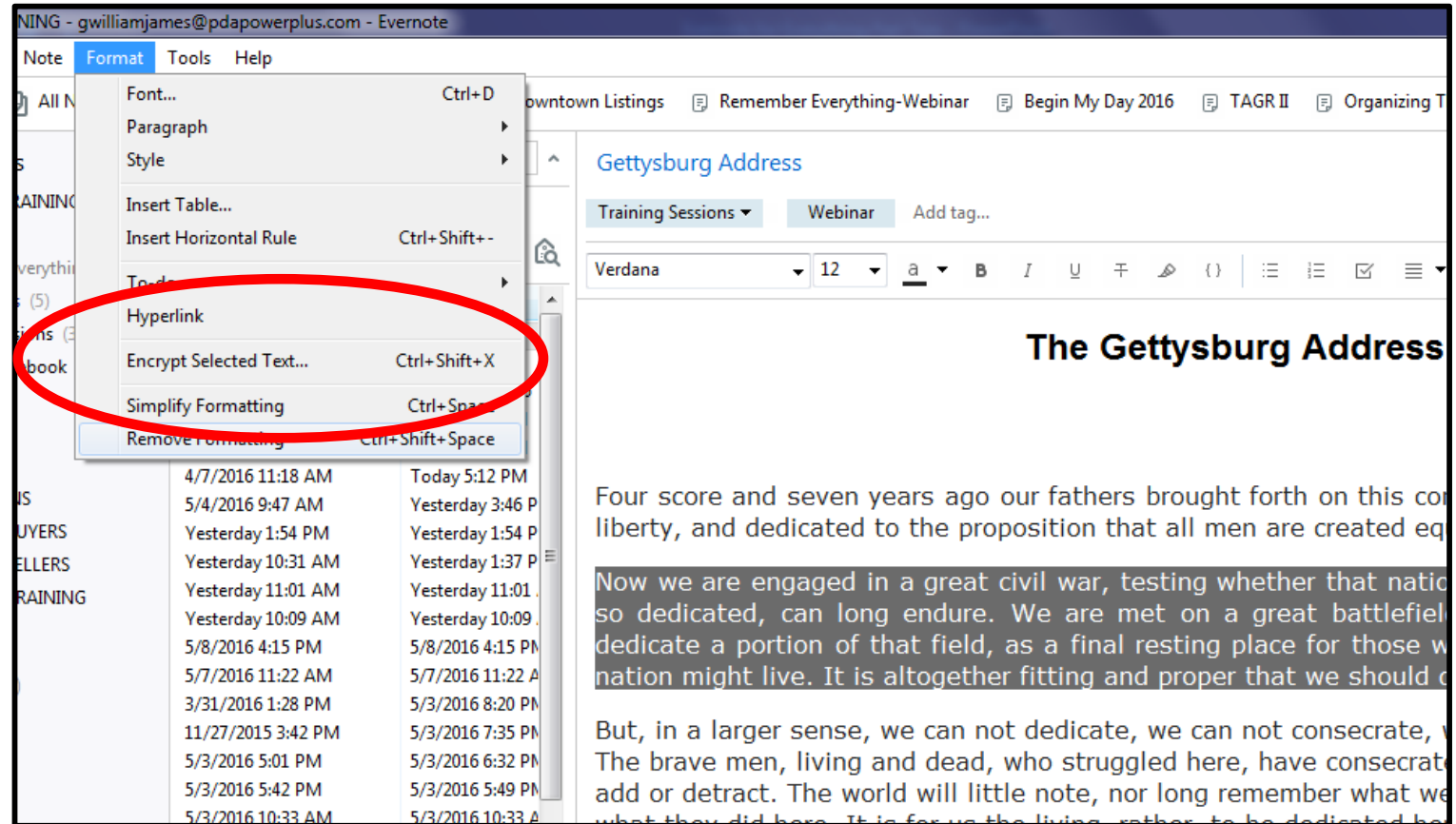
This is a desktop only feature.

Select and highlight the data to be encrypted

Menu > Format > Encrypt Selected Text

The first time you will be prompted to set a password.

Never forget that password- there is no recovery feature!



**Wednesday
June 17, 2020
10:00 am Pacific
1:00 pm Eastern**



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