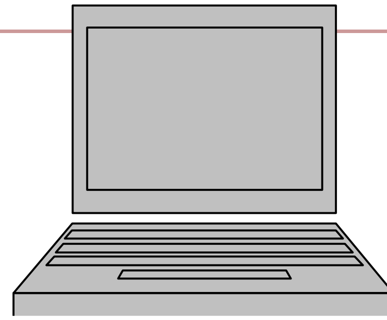
Shawn Kershaw Inc
Customized Organizing & Training

Lotus Notes Tips Sheet

This tip sheet is offered as a quick reference for the tips and techniques demonstrated in class.

E-Mail Best Practices



Standardize Outgoing Emails

1. Use tag lines for clarity:
    - FYI: For Your information
    - NRN: No Reply Needed
    - NTN: No Thanks Needed
    - END: the subject line is the entire message
    - AR: Action Required
    - Add an RSVP date for actionable items.

Set Personal Preferences

1. Select File
2. Select Preference
3. Select User Preference
4. Click Mail Tab
5. Select “When new mail arrives” choose:
    - Deselect “Show a Pop Up””
    - Deselect “Play a sound”
6. Click OK

Add a professional “signature.”

1. In your Inbox screen, select “Tools” menu
2. Select “Preferences”
3. Select the Mail Tab
4. Select the Signature Tab
5. Populate the signature field with your professional information: name, phone numbers, address…
6. Check “Automatically append to bottom of my outgo-ing mail messages”
7. Click OK

Calendaring Tips

Creating appointments received via E-Mail

1. Select E-Mail and
2. Go to “Copy into Button”
3. Choose “New Calendar” entry
4. Change subject line to appointment name
5. Select date, time, etc.
6. Delete unneeded text that came over with the email
7. Save and close

Storing relevant information within the appointment: agendas, confirmations, etc.

1. In the Description Section
2. Click “paperclip” icon from the toolbar
3. Browse for attachment (Word, Power Point or Excel)

Creating recurring appointments

1. This option is only available when you first create the appointment.
2. You can edit the recurrence option later but you can not turn an exiting appointment in to a recurrence.
3. Check the box next the word REPEAT
4. Dialog box opens
5. Choose options for repeating appointment
6. Click OK

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Contact Tips

Gather email addresses
The easiest way to capture email addresses

1. Select email and Select Tools button
2. From Drop Down menu select "Add sender to Address Book"
3. Lotus Notes captures the first name, the last name and the email address of this individual
4. Click OK
5. To add more information to this contact:
   - Go back into that person's contact
   - Cut and paste phone #s, street address etc

Distribution lists vs. categories:
An entire category of contacts can be sent information electronically via the category view in your contact list.

1. Select your contact list
2. Select Contacts by Category
3. Select appropriate category
4. Click on 1st person's listing in that category
5. Drag to highlight the rest of that category
6. Select "Write Memo" action button
7. The entire selection of names will be placed in the "To" field in a new E-Mail message

Add categories to distinguish from other contacts

1. In an individual's contact listing: Click the Advanced Tab
2. Select "Organize"
3. Select "Categories"
4. Select from drop down menu or add your own category

Store personal information in Contacts

A Lotus Notes Contact has four tabs:

- Business Personal Briefcase and Advanced Explore

these various fields to add:

- Family member names, birthdays, anniversary dates
- Comments, pictures, attachments

Task Tips

Move E-mails to Task List for future action

1. Select an E-Mail
2. Go to "Copy Into" button
3. Select from the drop down: "New To Do"
4. You are now in a Task Screen
5. Change subject line (begin with a verb)
6. Add due date
7. Delete unneeded text that comes over with email.
8. Save and close

Store supporting information within a Task

1. Open a new task
2. In the Description section of a Task, click "paperclip" icon from the toolbar
3. Browse for attachment (Word, Power Point or Excel)
4. Select appropriate document
5. Save and close

Categorize tasks – to break down larger projects, you can categorize tasks

1. Open a new task
2. Click the "Option Tab"
3. Select "Field" for Categorized
4. From Drop Down Menu select appropriate category or
5. You can add your own
6. Save and close

Create steps within a task: Mini project or Goal

1. Open a new task
2. In the Description Section list each step within the mini-project or goal
3. Select your next do-able action
4. Identify due date and priority
5. Save and close
6. Once completed, open task again
7. Select next step- rename subject line with next step
8. Change due date and priority
9. Save and close.
10. Repeat process until project or goal is completed.