EVERNOTE &
ThePaperlessAgent

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InMotion Seminar Group

Contents

MODULE 1 – THE DIGITAL FILING CABINET

INSTRUCTOR PRESENTATION

During this part of the course, you will:

- Learn What Evernote can "Really" do for you the real estate agent
- Meet an Evernote Ambassador in the Real Estate Industry
- Learn about security options for Evernote to keep your client's document safe
- Discover the difference between Evernote VS Dropbox

ARE YOU NEW TO EVERNOTE?

- Visit http://evernote.com/getting_started/ for a video tutorial and overview by Evernote.
- Subscribe to the Evernote Blog at www.blog.evernote.com
- Join the Evernote Forum at www.discussion.evernote.com
- Join the Evernote User Group on LinkedIn

Warning Platform Variation – Evernote will have a slightly different interface, depending on which platform you are using. I recommend that you begin with the Desktop Client.
- Evernote – The Desktop Client (downloaded to your PC, like Word – Your HQ)
- Evernote – Web Client (Using your favorite browser)
- Evernote – Mobile (Smartphone)
- Evernote – Mobile (Android)
- Evernote – Mobile (iOS)
- Evernote – Windows 8 (+Touch)

HOW TO INSTALL THE EVERNOTE DESKTOP CLIENT (HQ)
This client offers a complete, interface for managing all of your Evernote notes and notebooks on your Windows PC or Mac. To download Evernote installation software:

1. Go to **www.evernote.com and scroll to the bottom of the page**. The Web site will automatically detect what type of computer you are using and provide you with the correct download option.

DOWNLOAD EVERNOTE

REFER A FRIEND

2. Click **Download**. When the download completes, double-click the file to launch the setup program.
3. After the setup program completes, click **Finish**. To launch Evernote, click the icon in your **All Programs** menu within the Evernote folder.
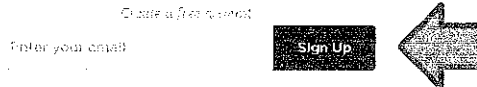
You now have Evernote software downloaded to your PC. Congratulations.

HOW TO SET UP A FREE EVERNOTE ACCOUNT (WEB CLIENT)

1. Visit **www.Evernote.com** and click **Sign Up**.

Remember Everything

Evernote apps and products make modern life manageable, by letting
you easily collect and find everything that matters.

Create a free account

Enter your email   Sign Up

   a. Fill in your registration information
   b. Choose a unique username and password
   c. Hit **Register** and then follow the link in your Evernote confirmation email to log into your account.
   d. You are now set up with the Evernote Web client

EVERNOTE INTERFACE TOUR

During this portion of the class you learn about Evernote's 3-column format. Reference (**Tools>Options**)

MODULE 2 - ALL ABOUT NOTEBOOKS (DESKTOP VERSION)

ADOPTING A NEAR-PERFECT ORGANIZATION "SYSTEM" IN EVERNOTE

DISCUSSION

   a. Ambassador Recommendation: **Google** *"Real Estate Agent Evernote Ambassador"*

   http://blog.evernote.com/blog/2012/02/22/6-real-estate-tips-from-krisstina-wise-new-real-estate-ambassador-plus-evernote-for-real-estate-webinar/

   b. Read this post about how a real estate agent uses Evernote.

1. Notebook Creation (Local vs Synchronized)

<u>Option 1</u>

 a. To create a notebook go to **File>New Notebook**.
 b. You will see the box below. Give your Notebook a name. I highly recommend that you name your Default notebook **Inbox**. This will make it easy for you to find everything you send to Evernote. FYI – You can only have 1 Default.
 c. Notice you have **2** types of notebooks you can create: a **synchronized** notebook, which can be a default notebook, or a **local** notebook, which is simply stored on your computer. Be careful. You cannot change it once you decide. Synchronized notebooks can be shared, local networks cannot.
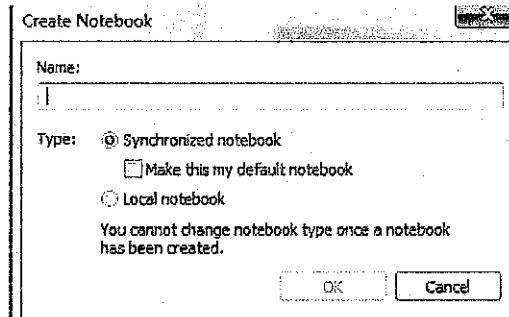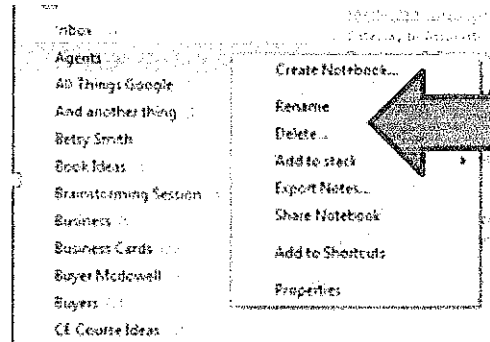
<u>Two Additional Options to Create Notebooks</u>

1. Use the shortcut key **Ctrl+Shift+N**
2. **Right-click on Notebooks** (or anywhere in the area around Notebooks) and select **Create Notebook**
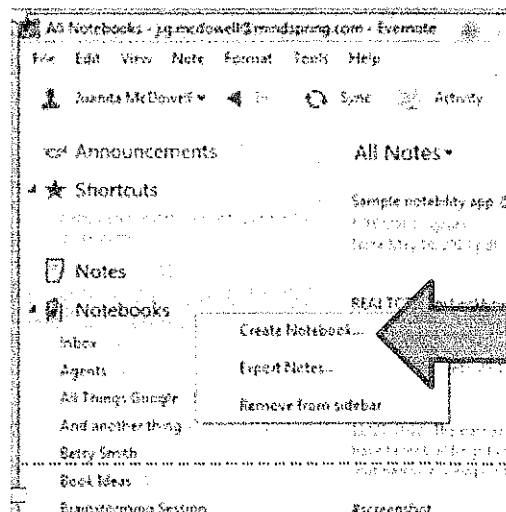
a. To rename or delete, right click on Notebook. See arrow for option to delete.

b. To Rename a Note, you can also use the Shortcut **F2. To Delete, hit delete key.** You can also delete multiples at once, using the **CTRL** key. Note you can delete multiples notes at once. Use SHIFT or CTRL key to select the ones you want to delete.

c. To Create a Stack, move one notebook on top of another or select 2 notebooks, right click and **Add to stack.** Next, click **New stack.** (arrow below).
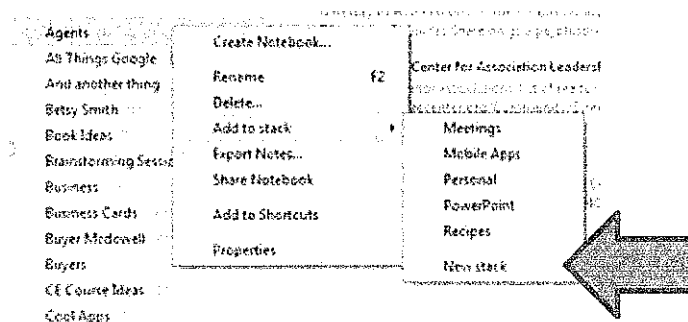
d. To back up a note, click on a Notebook with at least one note. Select **Export Note**. You will see several available formats.

e. In the Desktop client, Right click on a notebook and hit Export.

f. **Tools>Options>General Folder** and select **Open Database folder** (near the bottom)

g. Inside that folder, find the .exb file that's named with your username

h. Make a copy of the .exb file on your desktop or another location

You can find Keyboard shortcuts by referencing the top navigation menu bar.

MODULE 3 - ALL ABOUT NOTES (DESKTOP/HQ)

1. Types of Real Estate Notes (ink, audio, webcam) – General Discussion
2. How to Create Notes
   a. To create a text note, begin by selecting the notebook where you want it to go. Right click. Or, go to the **File** Menu, or use the keyboard shortcut, **CTRL+N**. On the toolbar you'll see a New Note drop down with different kinds of new notes:
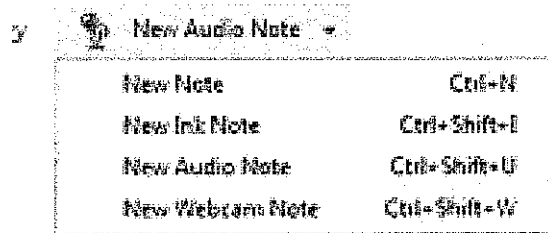
3. How to Format Notes
   a. Open a new note. Go to the Formatting toolbar. You have several editing options to explore.
4. How to Edit and Save Notes
   a. Click inside the note to edit. The note saves automatically.
5. Merging Notes
   a. Over time, while working with Evernote, the number of notes you accumulate will grow. It may feel unmanageable. I recommend merging where it makes sense.
      i. To do this first select the notes you want to merge together. You may hold down your **CTRL** key to select the notes that are not next to each other. Right click any one of them and from the pop-up menu, choose **Merge Notes**. Or go the **Note** menu. You'll see **Merge Notes** from there.
6. Deleting and Restoring Notes
   a. If you delete a note and it goes to the trash. You can drag it back up the designated notebook.
7. Syncing Notes – Automatic and requires no action on your part.

Notes are automatically synched across your devices.

MODULE 4 – MULTIMEDIA AND ADVANCED NOTE FUNCTIONS

INSERTING A SCREENSHOT

a. Go to the bottom right hand corner of your computer screen. This is called the tray. Right click the Evernote icon and you'll see **Clip Screenshot**.
b. Select the part of the screen you want. This will show up as a note. Assign it to the appropriate Notebook.

PASTING PDF CONTENT (I.E. REAL ESTATE CONTRACT, ADDENDUMS) INTO A NOTE

a. Open a PDF document and go **Edit>Copy File to Clipboard**
b. Go to Evernote Note and select paste (CTRL+V)

ATTACHING DOCUMENTS TO A NOTE

a. Click on the chevrons. (if needed, depends on your panel size)
b. Use the paper clip icon. Find and attach a document to a note

FROM EMAIL TO EVERNOTE (SIMPLE)

a. You have a secret Evernote email address. Go to the Web Client and look in the top right hand corner for Account Settings.
b. To send an email to your Evernote account, use the @ before the name of the notebook you want the email to reside in. Use the # to give it tag.
c. Example: SUBJECT: @my company #graphics #PR #design #custom header

EVERNOTE AS A CONTACT RECORD (POTENTIAL HOMEBUYERS ARE NEVER LOST AGAIN)

a. When using Evernote Desktop, it's easy to snap a picture of a business card. Use the Webcam Note and snap a picture of the card. You can also add audio so you will remember why you are keeping this card.
b. Suggestion: Create a Notebook called **Potential Buyers**. Keep their cards whether you are using the mobile or Desktop. Add audio file.

MODULE 5 – USING EVERNOTE TO WORK WITH A BUYER

1. Strategic Set up for Working with Buyers

One of the best ways to work with Real Estate Buyers in Evernote involves assigning a Notebook to each one, according to their last name. Over time, you will have numerous

notebooks and names; therefore you should adhere to a naming convention that identifies your buyers as buyers. You can do this by simply adding a prefix such as _B to group them all together. Example for Buyer Smith: **_B _ Buyer Smith**

The reason for the _ is so that it floats to the top of the pile. The B identifies that this is a Buyer and the _ is a divider to indicate which buyer. You could also use a dash symbol. Example: **_B – Smith.** In Evernote, your Buyers would look like this:

⊿ 📔 Notebooks

Inbox (64)

_B_Jones

_B_Smith

_B_Washington
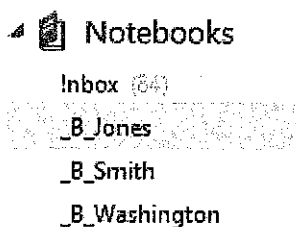
Notice that the first underscore character **_B** placed them at the top, right under the default notebook. The B identifies them as Buyers. Now all of your buyers are grouped together. And Evernote alphabetizes them automatically so they can be found easily when your notebook list grows longer legs. ☺ **You can now create a Stack called Buyers.**

To create a stack, drag one Notebook atop another and name the stack (as denoted below). You can collapse this list and keep your Evernote neat and tidy.

⊿ Buyers

_B_Jones

_B_Smith

_B_Washington
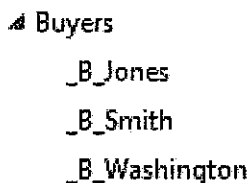
Another strategic organization strategy involves creating a stack called Real Estate. Within this stack you can keep your Buyers and Sellers. Advice: Regardless of which methodology you use, when you close a client, you should either (1)EXPORT the notebooks of Closed Clients to a CD AND hard drive (that is backed up by cloud service), OR (2) create a stack called **ZZ_Closed Clients** and move the notebooks of all of your former clients in this stack. **ZZ** – so that it ends up at the very bottom of the stack. Or, (3)If you're a pro Dropbox user, export and park this file in Dropbox as discussed earlier.

2. **Creating Templates.** Templates are simply forms that you use often. It's best to create a Notebook of templates for those that you will use on a regular basis. Here are a few examples of when you would want to create a template.

a. First Communication. Take all of the questions you would ask a client during the first conversation and place it on a standard template. In the Evernote Editor you will see a Table option that will enable you to set this up properly.
b. Don't reinvent the wheel. Daniel Gold (www.degconsulting.net) and others have created all sorts of Evernote templates that you can use. In fact you can join his Joined Network folder to access many great ones. Other template examples:
   1. Phone Logs with Consumers
   2. Buyer Meeting and Consultation

3. **Sharing Notes with your Buyer, Loan Officer, Closing Attorney & Extended Team**
   a. How do you share a notebook? Right Click on a Notebook and select **Share Notebook**. Select **Share with Individual** or **Create a Public Link**.
   b. How do you link to a shared notebook? Easy. Simply accept an invitation to Join a Notebook from another Evernote user. You are now "linking" your account to the owner of this shared notebook. To stop – Go to the left hand panel and delete the notebook. **Also, you must also go to the web version, Right click and **Leave** this notebook. Now you are no longer linked.
   c. Using Encryption to Share Special Content. If you are sharing a note and there is content in those notes you don't want to share, you can hide it with Evernote Encryption. You can encrypt from the Format menu.
      1. Select the text.
      2. Use keyboard shortcut. **Ctrl+Shift+X** or if you prefer simply right-click your selected content and from the pop up menu choose **Encrypt Selected Text.**
      3. **Note**: If this is your first time using this feature, you're going to see a field for entering an encryption passphrase. This is going to be the passphrase you use to unlock the hidden content. **Don't forget it!**

4. Get Ready for a Home Tour. Create a template that works well with buyers.
   a. Begin by emailing MLS sheets to your Evernote account. In Evernote, create a _Buyer Notebook. Inside, create a Note. Write about the client's needs and desires (using template).
   b. Now enter the note full addresses (of homes you plan to see) and phone #s (Listing Agent, Loan Officer) in the Note.
   c. Now you are ready to show the properties to the client and the Maps application is ready to help you drive there. (Addresses link to Maps)
   d. If you're in person with your client, tap on the microphone. It records the level of your voice. Grab and save **conversation** in that note.

ADDITIONAL TIPS

1. As you move around the house with your client, record the conversation with the Evernote Recorder. "What do you think of this kitchen—big enough?" Maybe afterwards – "What were your favorite features? What didn't you like?"
2. Leave the audio file in the **Note** that you created.
3. Now, use the **Camera** feature. Take pictures of the home with your iPad or iPhone. When you hear the Oos and Ahhs, snap a picture. Take detailed photos about things your client really liked, even the neighborhood.
4. You share this notebook with your client.

**Tip**: Use the _____app for picture for an Evernote note so you can select the size.

MODULE 6 – USING EVERNOTE TO WORK WITH A SELLER

Set up templates for the following. **Instructor demo and discussion.**

　　a. First Communication with The Consumer.
　　b. Creating an Agent To-Do List
　　c. Preparation for Your Listing Appointment

MODULE 7 – ADVANCED SEARCH FUNCTIONS

1. The Importance of Tagging. This will save you time down the road when you need to retrieve content.
   a. There are different types of tags you might want to add. The subject of a note is considered a type of tag.
   b. Business Cards. IF you have loaded a business card (singular) note, make sure you tag it. Use **CTRL+ALT+T** to tag it.
   c. Press Enter or Return on your keyboard to save tag. The note or tag has been added to the note. You'll also notice a new tag is ready to be entered.
2. Search Tricks. There are many operators, but for this class we'll keep it simple.
   a. Enter **Notebook:** in the search field with the term you're looking for, it will only look for notes in the notebook that matches that term.
   b. Enter **Tag:** in the search field with the term you're looking for, it will look for tags only.
   c. Enter **Encryption:** to find notes that contain encryption
3. How to Sort. Go to All Notes to see how this works. Click the list icon at the top. Hover over Sort Notes by and go across to the submenu and see options that include size, title and more.
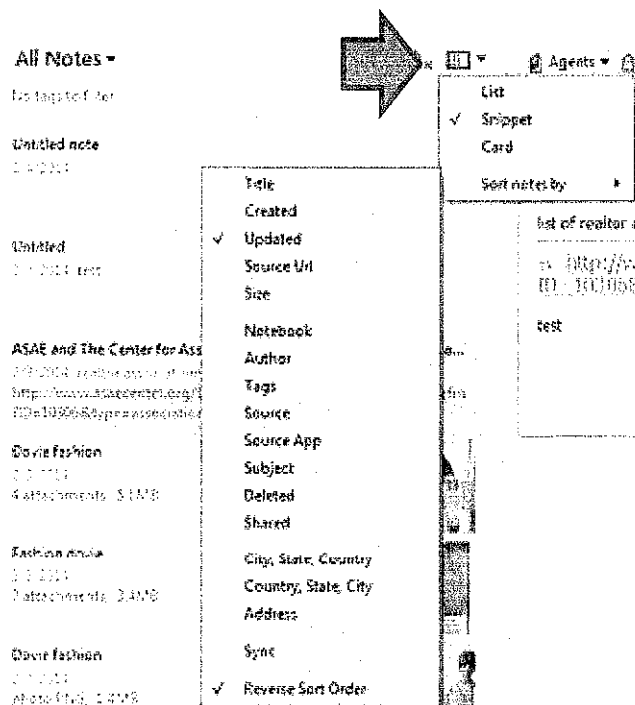
MODULE 8 – EVERNOTE ON YOUR MOBILE DEVICE

1. How to Install Evernote on Your Mobile Device
   a. Go to the App store and install Evernote on your mobile device. Evernote knows what version to install. Once the installation is complete, Tap the Open button or hit your Home button on your mobile device, and find the Icon for the Evernote App.
2. How to Create a Note on a Phone or Tablet
   a. Tap the paper clip icon. Choose the type of Note.
3. The New Way to Store Business Cards So You Can Always Find It Later
   a. Create a new note. Tap the camera icon. Label, assign it to your Business Card Notebook. Add audio.

Homework: Make sure you access your Evernote guides for your specific mobile device. Google "Evernote Knowledge Base" and you'll find additional articles and guides. Or type in your device behind this URL. Example: www.evernote.com/evernote/guides/iOS

3. Skitch for Windows. Visit this page to download. http://evernote.com/skitch/
4. **Search the web + Evernote.** Go to Settings>**Extensions**<Under E.Clipper>**Options**<Tick **Related Results**

REFERENCE SECTION

Evernote Vocabulary for this class

Note: A single item stored in Evernote.
Notebook: A container for storing notes.
Tag: Descriptive text attached to the notes
Stack: A set or collection of notebooks. (JM)
Clipping: Capturing content from other sources
Sync: The process by which your Evernote notes are kept up to date across all of your computers, phones, devices and the Web.
Account: A username and password that allows Evernote to identify your notes and make them available to you anywhere.

Apps to Consider: FastEver Snap – Camera for Evernote. Great for image capture (as small as 320x240 or as large as 1600x1200)

Additional Option Worth Mentioning: Atlas View

Questions? Need more tech tips?
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