

Using Evernote Premium in Your Business

by Joe Stoddard

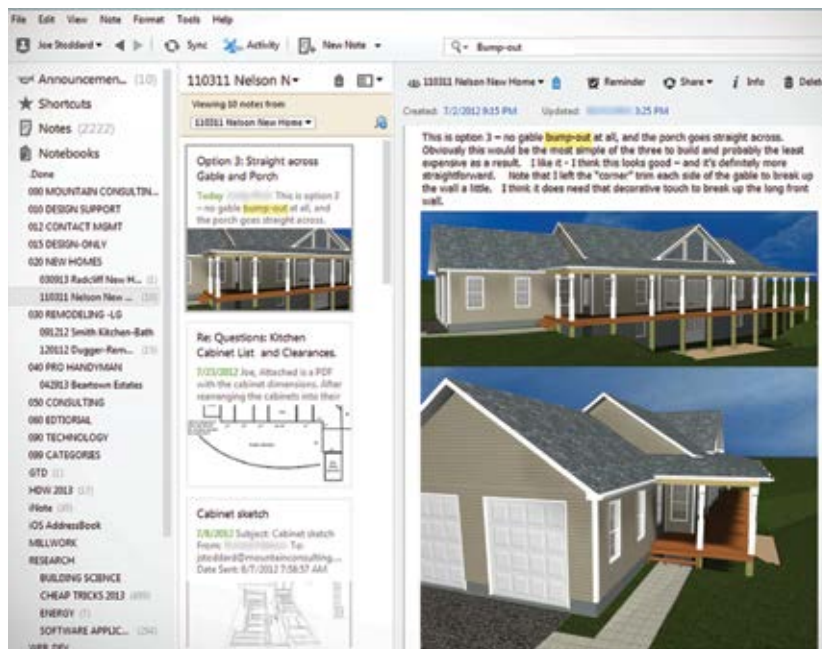
I first looked at Evernote around four years ago and was impressed with its simplicity, flexibility, and downright usefulness (“Faster, Smaller, and More Connected Than Ever,” *JLC* Dec/09). At that time Evernote (evernote.com) allowed you to capture practically any type of digital or real-world information, then retrieve it at will via a killer search engine. The basic idea is so simple that it’s easy to miss all the ways Evernote can be used to manage your business and personal information, which is the biggest reason I wanted to give it another look.

Evernote is one of a new breed of “cross-platform” applications that store information in “the cloud,” which means that you (and your team) can work with Evernote data from any device that can get online and has a Web browser. Or you can install a dedicated application for your smartphone, laptop, or tablet that will synchronize data between devices for online/offline use.

There are three versions of Evernote: “free” (limited capability); full-featured “Premium” (\$5 per month); and “Business” (\$10 per user per month), which adds a centralized console to control multiple employee accounts. For this column I’m focusing on Premium, because it has some features that are critical to Evernote’s success in business, such as the ability to extract and index text from photographs and even handwritten notes.

Evernote Basics

Since my first look, Evernote has added a few key collaborative features (such as Reminders) and has expanded its stable of “helper” applications, so it’s even



Evernote’s customizable desktop organizes Notebooks into Stacks (left column), and displays sorted notes from the active notebook (center column), as well as the active note (right). Search results highlight every instance of the search term (“bump-out” in this example).

more capable. With a little creativity, and without spending much more than your elbow grease, Evernote can be used for almost any application that requires capturing, organizing, and retrieving information, including to-do and reminder lists; jobsite walk-throughs and punchlists; and job specs, contracts, and photos, to name a few.

Notes. The base unit of information in Evernote is a Note, which can be hand-typed, clipped from other sources, or both. But Notes are not just text—they can be a mix of practically any kind of digital information, including photos and audio-video. You can also embed PDFs and Microsoft Office or Google Apps documents. A big part of the Evernote magic is the software’s ability to extract text of

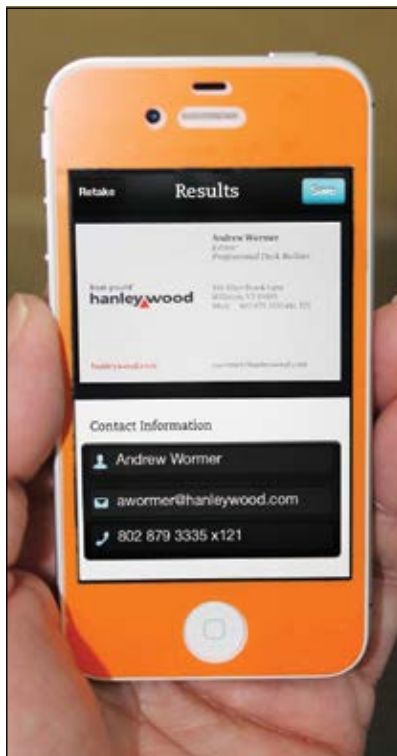
any kind (including handwritten scrawls on a scrap of 2x4) and make the resulting text searchable.

Tags. Individual notes can be further organized by assigning subject matter tags to them. This is a belt-and-suspenders approach because every word in every Note is already indexed by the search engine; but organization nuts will appreciate the ability to add another layer when searching for information.

Notebooks. Notes are optionally stored in Notebooks, and they in turn can be further organized into Stacks, as shown above.

Creating Notes

Notes can be created from the New Note menu, but there are also extensions that



Hello

Forget typing. A free contact management app from Evernote called Hello combines an excellent text-recognition engine with your smartphone or tablet camera and GPS system to make entering a new contact as simple as snapping a picture of his business card, truck sign—even handwriting on a scrap of paper.

Hello creates a note, logs the location, date, and time of your initial meeting, and builds the contact's background record by scouring Facebook, LinkedIn, and Twitter for more details (with your permission, of course). A feature called Hello Connect uses audio tones to automatically detect the devices of other Hello users nearby, providing an easy way to document meeting attendance, for example, or to sync additional contact information. —J.S.

will send data to Evernote from many popular applications and Web services.

Email address. Evernote provides each user with a unique email address. By using the Cc: or Bcc: fields in your email software, both the message body and any attachments can be automatically saved to the default folder in Evernote. This is a fantastic tool for tracking expenses or making sure that no piece of project correspondence falls through the cracks.

Phone camera. Forget scanner apps: With Evernote, just take a photo and save it to the appropriate folder. This works equally well for a packing slip, a vendor invoice, or the serial number of an appliance you install, and takes a fraction of the time that keying in the information would. Similarly, a picture of the side of your electrician's truck showing the phone number and Web address will be indexed the same as a picture of his business card.

Web clipper. This tool lets you selectively grab any information you encounter online and convert it to a Note. Links can remain live if you want them to, and Evernote provides some markup tools, so you can highlight the important information in the captured clipping. The Web clipper is ideal for creating product notebooks or best-practice manuals.

Sharing. Putting the right information in the right hands at the right time is the key to good project communication. Evernote can make any static information collaborative by sharing Notes or Notebooks. Notebooks (and the Notes in them) can be shared selectively, either by individual email address (which keeps the contents relatively private) or by a public link that anyone can reach—for example, from your marketing website or Facebook page.

Evernote in Practice

Too many contractors wind up purchasing much more software than they'll ever actually use. Instead of jumping

into complicated building-specific software before you understand what you really need, you can use Evernote as a tool for developing and testing all kinds of business systems.

For example, you might create a simple purchase order or a customer relationship management system to get your toes wet. After using it for a few months or a year, you will be that much more aware of the features you really need, and you may even discover that you don't need to buy a big, powerful application.

Similarly, Evernote helps you make use of what you have. For instance, many contractors have tons of forms and documents they've developed over the years that would greatly improve their operations if they could find an easy way to share those resources with their project teams. Evernote makes it easy to store, share, and retrieve contracts, boilerplate specs, policy and procedure manuals, construction details, and other documents you've already created.

More Help

This column barely scratches the surface of Evernote's usefulness. The company maintains a wealth of ideas on its YouTube channel, and also maintains an App Center with third-party software and dozens of add-ins that work with Evernote. In addition, I've found these print resources to be helpful:

Evernote for Dummies, by David E. Y. Sarna and Vanessa Richie (\$12.36 for paperback);

The Complete Guide to Evernote, by David Garcia (\$1.99 for Kindle);

Mastering Evernote: The 2 Hour Guide, by Brandon Collins (\$2.99 for Kindle);

Evernote Essentials 4.0, by Brett Kelly (\$14.99 PDF at nerdgap.com). ❖

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