



iCreative

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## ***GETTING ORGANIZED***



## **OBJECTIVES:**

1. *GETTING ORGANIZED IN MAC MAIL*
2. *THE NOTES APP, CALENDAR, AND CONTACTS*
3. *BRINGING IT ALL TOGETHER*



## **HOW THIS CLASS WORKS**

*This class is designed to help you feel confident and comfortable using your Apple devices. To make the most of our time together, here's how today's class is structured.*

### **Our Goal Today**

*Today's goal is to understand the big picture first. You are not expected to remember every step or master everything today. Understanding how things fit together is what matters most.*

*Questions Are Welcome — With Structure  
Questions are important, and there will be time for them.*

*To keep the class clear and focused, we divide our time into:*

- *Teaching time*
- *Question time*

*During teaching time, questions are briefly held so the lesson can flow. During question time, we slow down and focus on your questions. If a question comes up during teaching, it will be written down so it's not forgotten.*

### **Why This Approach Works**

*Stopping for every question can break the flow and make the class feel confusing. This structure helps everyone stay oriented, understand the foundation, and get more value from the answers.*

### **Feeling Lost Is Normal**

*If something doesn't make sense right away, that doesn't mean you're behind. Often, clarity comes after the next concept.*

### **Our Commitment to You**

*We are committed to clear explanations, a patient pace, time for questions, and a supportive learning environment.*

***Thank you for being here and learning with us!***

# DEMO ONE

## **Demo 1: Getting Organized: Mail on Your Mac**

*How to Create Folders and Keep Your Email Clean*

*What You Will Learn*

*In this lesson, you will learn how to:*

*Create folders (called mailboxes)  
Move emails into those folders  
Keep your inbox simple and easy to manage*

### **Step 1: Open the Mail App**

- 1. Click the Mail app on your Mac*
- 2. Look at the left side of the screen (this is called the sidebar)*

*You will see:*

*Inbox  
Your email account (like iCloud, Gmail, or Comcast)*

### **Step 2: Choose Where Your Folder Goes**

*Before creating a folder, choose where to place it:*

*On My Mac  
→ Only stays on this computer*

*Under your email account  
→ Shows up on your iPhone and iPad too*

*Recommended:*

*Choose your email account so your folders appear everywhere*

### ***Step 3: Create Your First Folder***

- 1. At the top of the screen, click Mailbox*
- 2. Click New Mailbox*
- 3. Next to "Location," choose your email account*
- 4. Type a name for your folder  
(Example: Bills)*
- 5. Click OK*

*You will now see your new folder in the sidebar*

### ***Step 4: Create a Few Simple Folders***

*Create just a few to start:*

*Bills  
Medical  
Family  
Travel*

### ***Step 5: Move Emails into Your Folders***

*Easiest Way (Drag and Drop)*

- 1. Click Inbox*
- 2. Click an email*
- 3. Drag it to the correct folder*

*Example:*

*Doctor email → Medical  
Airline email → Travel*

## *Another Way (Right-click)*

- 1. Control-click the email*
- 2. Click Move To*
- 3. Choose your folder*

## *Move More Than One Email*

- 1. Click one email*
- 2. Hold the Command key*
- 3. Click more emails*
- 4. Drag them all into a folder*

## **Step 6: Make Important Folders Easy to Find**

*You can place your favorite folders at the top:*

- 1. Click and drag a folder (like Bills)*
- 2. Drop it into Favorites at the top*

*Now it is always easy to access*

## **Step 7: Flag an email to access later**

*To Flag an Email:*

- 1. Select an email from the Inbox*
- 2. Click on the orange Flag icon in the menu bar at the top*
- 3. Notice that it is now in the Flagged section in the left column*
- 4. You can always right click on an email to UnFlag it*

**My Notes:**

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# DEMO TWO

## Demo 2: Using the Notes App

### ***Why This Helps***

*If all of your notes stay in one big list, it can become hard to find things. Folders help you group notes by topic, such as: Personal, Medical, Travel, Shopping, Family*

*Think of folders like drawers in a filing cabinet.*

### **Step 1: Open the Notes App**

- 1. Tap the Notes app on your iPhone*
- 2. If you are inside a note, tap the back arrow at the top left until you see your Folders screen*
- 3. You want to be on the main screen that shows your folders.*

### **Step 2: Create a New Folder**

- 1. On the Folders screen, tap the New Folder button near the bottom*
- 2. Type a name for your folder*
- 3. Good examples: Medical, Travel, Recipes, Family, Bills*
- 4. Tap Save*
- 5. Your new folder is now ready to use.*

### **Step 3: Create a Few Simple Folders**

- 1. Create just a few folders to begin*
- 2. A good starter set is: Medical, Travel, Recipes, Family, Shopping*
- 3. Try not to create too many at first. Simple is better.*

### **Step 4: Move a Note into a Folder**

1. *Open the folder or notes list where your note is now*
2. *Find the note you want to move*
3. *Swipe left on the note*
4. *Tap Move*
5. *Choose the folder where you want the note to go*
6. *Example: a packing list can go into Travel*
7. *Example: a doctor question list can go into Medical*

*Another Way to Move a Note You can also:*

1. *Touch and hold the note*
2. *Tap Move*
3. *Choose the folder*
4. *This is helpful if swiping feels awkward.*

### **Step 5: Move More Than One Note at a Time**

1. *Go to your notes list*
2. *Tap the More button*
3. *Tap Select Notes*
4. *Tap the notes you want to move*
5. *Tap Move*
6. *Choose the folder*
7. *This is a great way to clean up lots of notes quickly.*

**My Notes:**

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# DEMO THREE

## Demo 3: Using the Contacts App

### *Why This Helps*

*You may not remember a name...  
...but you remember things like:*

*“plumber in Palm Desert,” “skin doctor near Eisenhower,”  
“electrician for my condo”*

*You can store those details in the Notes section.*

### **Step 1: Open Contacts**

- 1. Tap Contacts*
- 2. Tap + (top right)*

### **Step 2: Add Basic Information**

*Fill in what you know:*

*Name or business name*

*Phone number*

*Address (if you have it)*

### **Step 3: Add Keywords in Notes**

- 1. Scroll down to Notes*
- 2. Type simple words to describe the person*  
*Example: Plumber, Palm Desert, kitchen sink, emergency*

## **Step 4: Save**

*Tap Done*

## **Step 5: Use a Simple System**

*Always use this format:*

*Who + What + Where*

*Examples:*

*Doctor, Rancho Mirage, skin*

*Contractor, Palm Desert, electrician*

*Dentist, La Quinta, implants*

*Friend, Palm Desert, bridge club*

*Keep it short and simple.*

## **Step 6: Find Them Later**

*1. Open Contacts*

*2. Tap the Search bar*

*3. Type what you remember: name, city, type of work*

*Helpful Tip: Keep Words Simple, Use short, clear words you will remember.*

**My Notes:**

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## ***Organize a Doctor Appointment***

This demo shows how to keep the person, the appointment, the questions, and the email all in order. Let's figure out how we can leverage these apps (with a surprise app at the end!) to stay organized...

### **Step 1: Save the doctor in Contacts**

1. Open Contacts.
2. Tap + to add a new contact.
3. Enter the doctor's name, office phone, address, and email.
4. Tap Done.
5. Having the address saved here makes it easier to use later in Calendar and Maps. Apple also lets users keep their own "My Card" up to date with address and contact info.

### **Step 2: Create the appointment in Calendar**

1. Open Calendar.
2. In Day view, tap +.
3. Type the event title, such as Dr. Smith Appointment.
4. Tap Location or Video Call and enter the office address.
5. Choose the date and time.
6. Add an alert if desired.
7. Tap Add.
8. You can also add notes about the appointment, like things to ask when you get there in the Calendar event.

On iPhone, Calendar settings also include Time to Leave alerts, and on the Mac you can add travel time directly to an event, so that getting there is made that much easier.

### **Step 3: Create a doctor-visit note in Notes**

1. Open Notes.
2. Create a new note called Questions for Dr. Smith.
3. Add a checklist of questions or medicines to discuss.
4. If they have a paper document, tap the Attachment button and choose Scan Documents.
5. Using this tip, the document becomes part of the note.

*Notes supports checklists, attachments, and document scanning, and photos, which makes it a great “everything in one place” tool.*

*Cool Notes feature to consider:*

*You can scan an insurance card, referral sheet, or prescription list directly into the note instead of keeping track of paper.*

### **Step 4: Use Mail to manage the appointment email**

#### ***On iPhone:***

1. Open Mail.
2. Find the appointment confirmation email.
3. Tap it, then tap the Reply button and show Remind Me.
4. Set a reminder for later! It’s just that easy
5. The message will come back to the top of the inbox later.
6. Mail also has VIP, flags, and standard mailboxes like Remind Me, Follow Up, and Send Later.

*This is one of the best productivity lessons because it teaches us that we do not have to handle every email immediately.*

*Cool Mail feature to consider:*

*If you are writing an email to the doctor's office, you can touch and hold Send and choose Send Later.*

*Apple says Mail can use custom mailboxes, VIP, flags, and categories to organize messages.*

*Cool Mail feature to consider:*

*Categories can automatically sort some incoming messages, and VIP can make important senders easier to spot.*

## **Step 5: Use Voice Memos to record the doctor!**

### ***On iPhone:***

1. Open Voice Memos.
2. Click the Red Button to BEGIN recording.
3. Click the Red Button to STOP recording.
4. When you are done recording you can click on the 'three dots' icon to rename this recording  
"Dr Parker, 3-22-26, next steps"
5. After renaming the recording to make it more familiar, click on the 'three dots' icon again and choose "View transcript."
6. Once the transcript shows, you can Tap and Hold on the text to copy it! You can then email, text or paste into a note!

## **OTHER HELPFUL RESOURCES:**

*In macOS Tahoe, the Tips App has everything you need, literally manuals for all devices, apps and software. The most incredible resource there is!*

The App icon looks like this:



*Don't forget that there is a website dedicated just to this class, with downloadable versions of these files. I will also post tutorial videos of the class based on your feedback!*

[www.theicreative.com/gettingorganized](http://www.theicreative.com/gettingorganized)