

To effectively manage your incoming mail you can use the Follow up Flag feature in Notes. This provides a simple technique to flag your messages as Urgent (red flag), Normal (green flag) or Low priority (white flag). In addition to flagging a message for follow up, you can also add the follow up action required for the message. To learn more about the Follow up feature, see quick reference card **Mail follow-up options (MA10)**.

If you use the follow up feature along with mail views in Notes, you are provided with an effective solution for managing shared mail accounts between a group of people, where different individuals are responsible for particular items.

Alternatively you could use this feature to create action items for yourself (e.g. 'for action', 'for info', 'delegated' etc.)


**Some preparation is required**

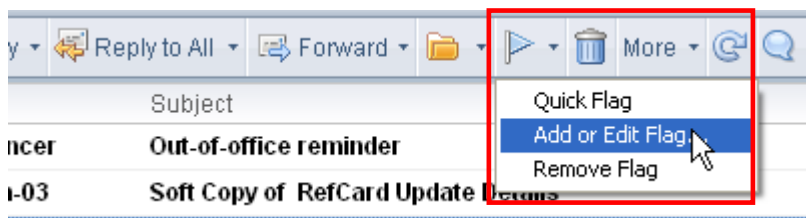
You need to decide on a list of key words to be included in the follow up action.

Here are some examples of values you can assign to mail:

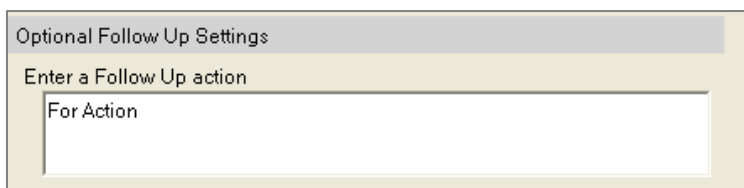
<b>Manage your own mail by adding a follow up action to items</b>	<b>For shared mail accounts, assign an action to a particular person</b>
For Action	Assign to Julie
For Info	Assign to Richard
Delegated	Assign to Desiree

**Add a follow up action to an incoming mail message**

1. Open the Mail tab.
2. Select the mail message in the Inbox.
3. Click on the drop down arrow beside the **Follow up**  button.
4. Select **Add or Edit Flag**.



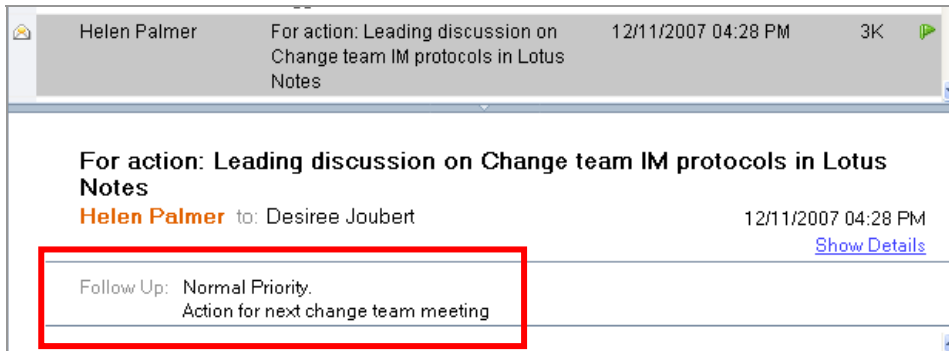
5. Add key words to the Follow Up action text box.



**Note:** If you are using the Follow up action together with Mail Views, the text is case sensitive. Whatever case you use in the Follow up action text needs to be duplicated when you set up a View.

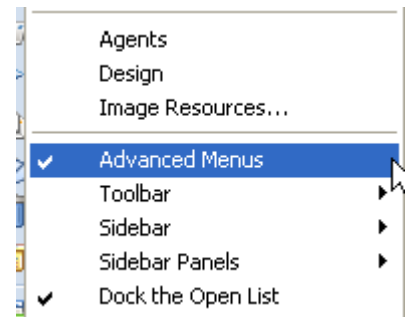
**6. Click OK**

**Tip:** View the Follow Up action using the **Preview Pane:**

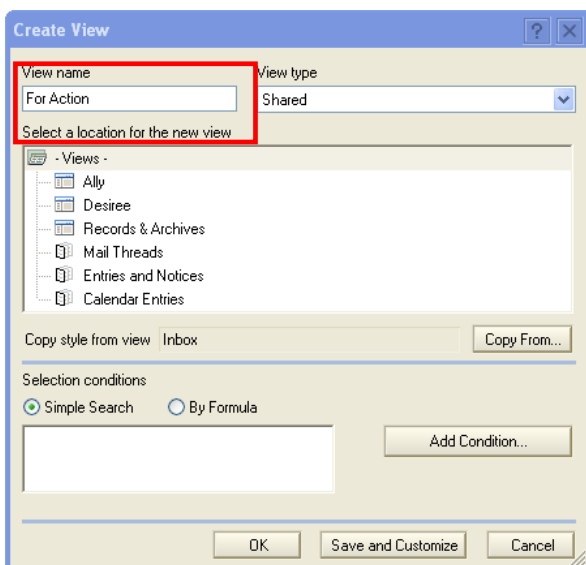


**Create a View to filter on follow up action key words**

1. Open the Mail tab.
2. Click **View > Advanced Menus** (Advanced Menus must be ticked to create views).
3. Click **Create > View**.
4. Add a View Name.



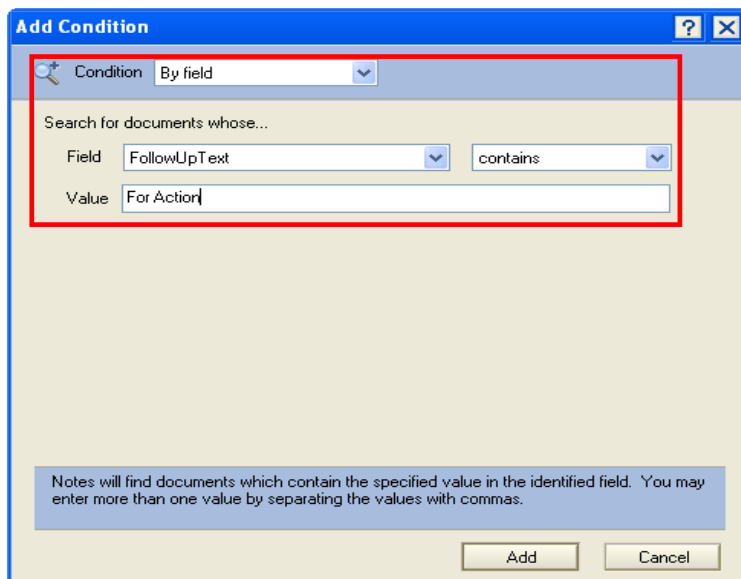
**Tip:** Associate the View name with the Follow up action text. If the action is 'For Action', name the View 'For Action'.



A View type set to Shared will enable users with delegate access to access the Views.

5. Click the **Add Condition** button. The condition needs to look at the Follow up action text.
6. Select **By field** for the Condition.
7. Select **FollowUpText** for the Field.

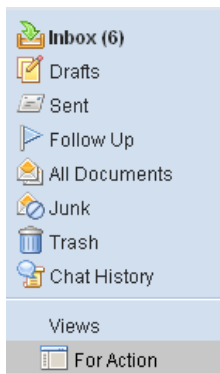
8. In the **Value** field add the key word. The key word must match the text and case of the value you are adding to the **Follow Up** action.



9. Click **Add** and click **OK** to save the View.

**To view messages that have been tagged with the key word**

10. In the Mail window, double-click **Views**. The View you created will display, and all messages you flagged with corresponding keywords will appear in the View.



11. Flagged messages will appear in the View until you remove the flag.

12. To remove the flag, click on the drop down arrow beside the **Follow up**  button.

13. Select **Remove Flag**.

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**Tip:** If you are working with a shared mail account, items not read by you will display in bold. Use the flags to determine whether someone else has processed the mail rather than relying on read/unread marks.

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### Update or remove Views

You can only rename or remove a View. You are not able to update the conditions.

1. Double-click on the View you wish to rename or remove.

2. Click on **Actions > View Options**. To rename, choose **Rename**. To remove, choose **Remove**.

