To Do

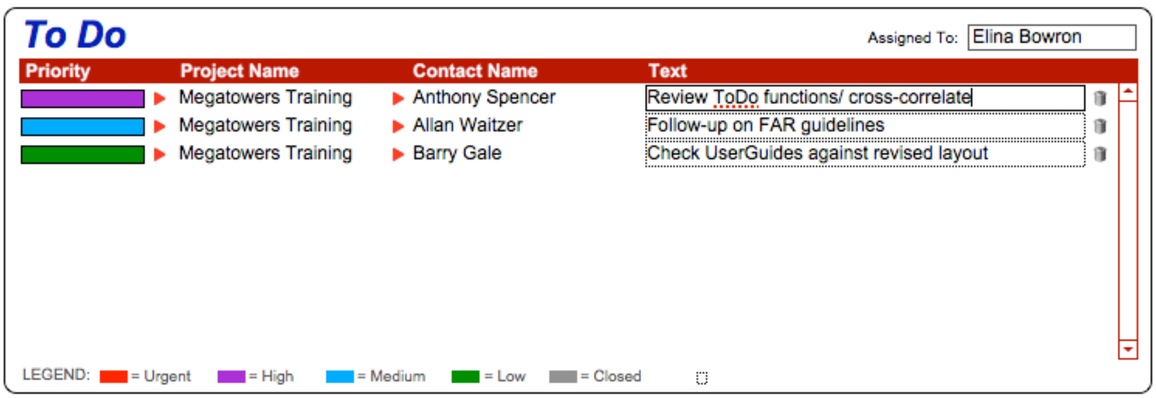
Version V3.10.30: 8 March 2012

The *To Do* tool

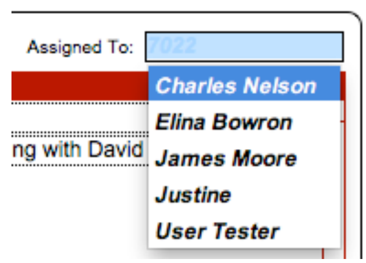
To Do is a powerful **iProjects** feature, originally suggested by one of the system Beta testers, that focuses and prioritizes attention on important actions.

The ***To Do*** box displays a list of to-do items created by, or assigned to, you. The ***To Do*** items are auto-sorted according to the priority, with the most urgent always on the top, second most urgent next, and so on. You will find ***To Do*** at the bottom of the home screen.

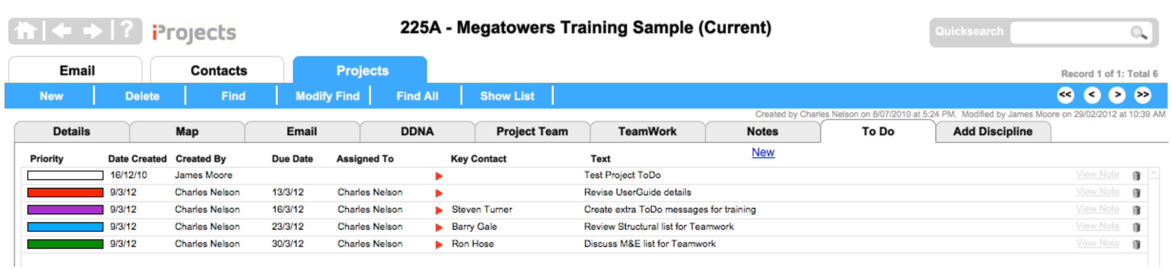
At the bottom of this field is a **Legend**, indicating the **Priority** for your **To Do** tasks.



You can view the ***To Do*** items for any person who is listed in the ***Users*** section under the ***Office Admin*** tab, as shown at right. Just click on the person whose ***To Do*** items you want to review.



Clicking the left-hand red arrow of any item takes you to the ***Details*** page for that project; from there you can click on the ToDo tab and see a list of all ***To Do*** items for that particular project, as shown below.



The "Assigned to" field can be any person who is listed in the ***Users*** section under the ***Office Admin*** tab. Clicking on the red arrow next to any Key Contact takes you to that contact's record in the ***Contact*** system.

If a ***To Do*** item is linked to a Note, "View Note" button will be shown on the right side of the ***To Do*** tab, as indicated in the sample above. Clicking on the button takes you to the linked Note.

Adding a ***To Do*** item to the ***To Do*** list:

The ***To Do List*** allows you to add tasks to a contact. Any items added under the ***To Do*** tab will be listed on the ***My To Do*** section on your main work area.

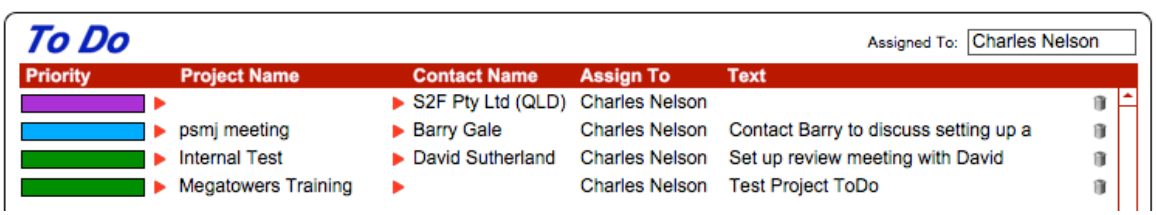
A ***To Do*** item can be created in ***Contacts*** (the Green Menu Bar), ***To Do List*** tab (see below) or in ***Projects*** (the Blue Menu Bar) ***To Do*** tab**.**

In ***Contacts***, click on ***To Do List*** tab:

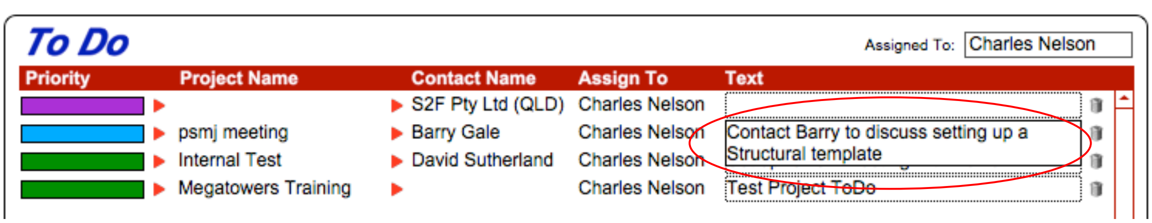
Click New to add a new or another line item.

Above, the "Date created" and the "Created by" fields are auto-filled. You select Priority, Due date, Key project, and enter the To Do note in the Text field.

If I now return to my Home page, I can see that this new To Do item has been added to my list of action items, sorted by priority:



Click in the note field to reveal all of its content (the text in the red oval). You can modify the To Do here. Click anywhere outside the highlighted Text to return to the previous screen.



To DELETE a To Do, you must first CLOSE it – by changing its Priority to CLOSED (grey indicator). This prevents the accidental deletion of To Dos. If a project has been deleted, any To Dos related to that project will not be openable.