3.6 Contacts: Map, Notes & To Do List

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Overview

This UserGuide discusses three simple but very useful ***Contacts*** tools: The ***Map, Notes*** and ***To Do List*** functions.

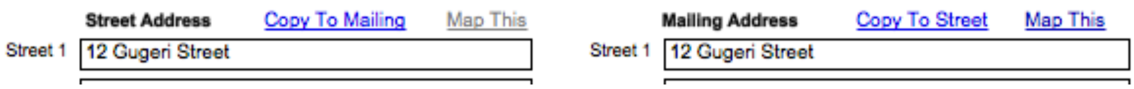
Map

Have a meeting at a new team member's office? Just click ***Map***, print, and head on over there.

If you are running **iProjects** on your iPhone or iPad, it's even easier; your map to their location is in your hand.

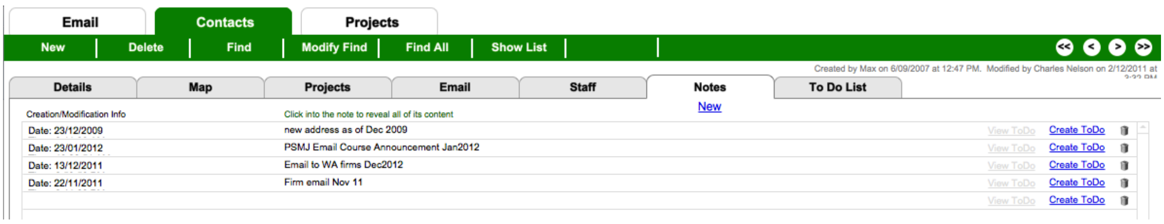
If you are connected to the Internet, clicking the **Map** tab will take you straight to a Google map of the address of the person or firm whose record you are on – provided that the contact record shows a street address for the contact (firm or person). Because many firms prefer that you use a post office box as a mailing address (which means Google can't find their physical location), we have included a handy little feature to copy mailing addresses to street addresses and vice versa (eliminating key entry errors).

There is also a "Map this" button to tell Google Maps what address to map. These tools facilitate keeping your database in good working order when you are importing contacts, while eliminating confusion resulting from firm preferences for street or postal box addresses.



Notes

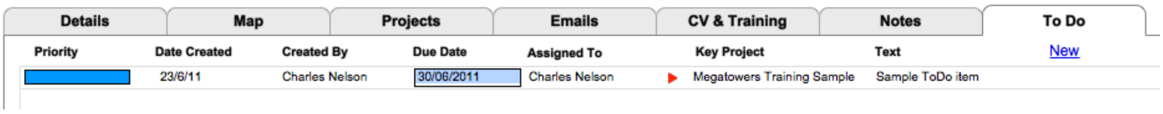
The Notes function provides for the entry of virtually unlimited information about contacts that is not otherwise captured in the ***Details*** page. Notes can be created for both Persons and Firms.



Unless you have keen eyesight, this screen shot may be a little hard to read here, but it provides, in list view, the date (auto-entered) that a Note was created, the Action required of the Note, the Status of that Action, and the Title of the Note.

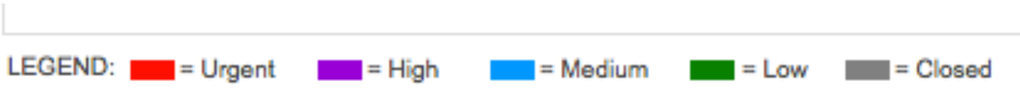
ToDo List

The ***ToDo*** function connects your internal team members to tasks that need doing. ***To Do*** items can be created against any Note, by using the Create To Do button at the right edge of a list item, and can be viewed by clicking the View To Do button.



This screen shot is also not for the vision-impaired. It includes the To Do priority, date created, who created it, a date by which action is required, who the To Do is assigned to for action, the Key Project it is assigned to (if any) and a brief text field identifying the note it relates to.

To Do priorities color-coded and are assigned by the dropdown Priority field, as shown in the legend below. See UserGuide 1.4 To Do for more information.



Related UserGuides:

For help with:

Displaying your key contacts on the Home page, see UserGuide 1.2: My Contacts.

Creating new contacts: See UserGuide 3.1: Contacts: Menu Bar Functions.

Managing the ***Contacts*** database: See UseGuide 3.2: Contacts: Details.

Assigning persons and firms to projects: See UserGuide 3.3: Contacts: Projects.

Connecting persons to firms: See UserGuide 3.5: Contacts: Staff.