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.

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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.

	Street Address	Copy To Mailing	Map This	Mailing Address	Copy To Street	Map This
Street 1	12 Gugeri Street			Street 1 12 Gugeri Street		

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.

Email		Contacts	Proje	cts						
New	Delete	Find	Modify Find	Find All	Show List				S (2 22
							Created by Max on 6/09	2007 at 12:47 PM. Modified by Ch	arles Nelson on 2	2/12/2011 at
Details	N	lap	Projects	Email	Staff	Notes	To Do List			0.00 044
Creation/Modification In	fo		Click into the note to reve	al all of its content		New				
Date: 23/12/2009			new address as of Dec	2009					Create ToDo	1
Date: 23/01/2012			PSMJ Email Course A	nouncement Jan2012					Create ToDo	8
Date: 13/12/2011			Email to WA firms Dec	2012					Create ToDo	1
Date: 22/11/2011			Firm email Nov 11						Create ToDo	1
									Create ToDo	10

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 <u>Create To Do</u> button at the right edge of a list item, and can be viewed by clicking the <u>View To Do</u> button.

Details	Мар		Projects	Emails	γ	CV & Training	Notes	To Do
Priority	Date Created	Created By	Due Date	Assigned To		Key Project	Text	New
	23/6/11	Charles Nelson	30/06/2011	Charles Nelson	•	Megatowers Training Sampl	e Sample ToDo item	

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 <u>To Do</u> for more information.

LEGEND: Urgent = High = Medium = Low = Close	LEGEND:	= Urgent	= High	= Medium	= Low	= Closed
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Related UserGuides:

For help with:

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

Creating new contacts: See UserGuide 3.1: <u>Contacts: Menu Bar Functions.</u>

Managing the *Contacts* database: See UseGuide 3.2: <u>Contacts: Details.</u>

Assigning persons and firms to projects: See UserGuide 3.3: <u>Contacts: Projects.</u>

Connecting persons to firms: See UserGuide 3.5: <u>Contacts: Staff.</u>