

# White Paper: Using Toodledo Task Management Software with the Master Your Now (MYN) Task System,

Version 3.0 Aug 29, 2011

By Michael Linenberger

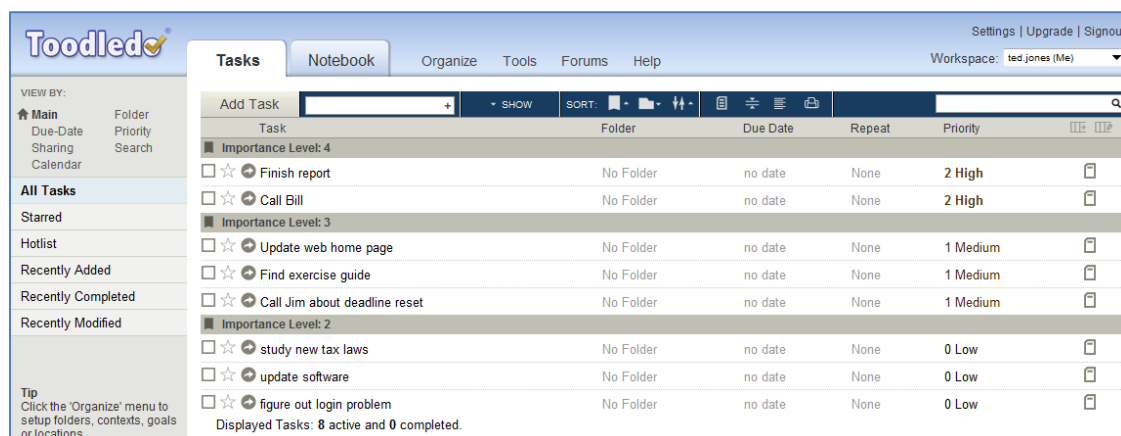
## Introduction

The Master Your Now task system (MYN) is the central methodology behind the number 1 bestselling Microsoft Outlook Book, *Total Workday Control Using Microsoft Outlook*. It's also the core of the book *Master Your Workday Now!* which was the number 1 bestselling time management book in early 2010. Tens of thousands of people are using the MYN methodology, and as a result, are enjoying a low-stress and highly productive workday with their e-mail and tasks well under control.

Up to now, the primary way to automate MYN has been using Microsoft Outlook. However, many people do not use Outlook; they are using other mail systems like Gmail, Mac Mail, Entourage, or others. Many of these people would still like a fully computerized approach to implementing the MYN system to get their workdays under control. And many people are looking for an iPhone or iPad version of the MYN system as well—or some other mobile system. And unfortunately Outlook tasks do not sync natively with iPhones or iPads (though there is a third-party solution called [TaskTask](#)). In fact, Outlook tasks do not even sync with the new Windows Phone 7! So a solution for tasks is needed that provides cross-platform and mobile capabilities.

That's what this white paper is about. Finally, another system is available that I feel meets or exceeds the capabilities of Microsoft Outlook for managing tasks per MYN. It's called Toodledo and it can be run on *any* computer such as a PC, Mac, or Linux. It also runs in dedicated apps on mobiles systems like the iPhone, the iPad, and even Android systems (in an app called Pocket Informant, and in a browser), with full synchronization across all.

But it takes a little study to understand and use this software for MYN, so read on.



The screenshot shows the Toodledo web interface. The top navigation bar includes 'Tasks', 'Notebook', 'Organize', 'Tools', 'Forums', and 'Help'. The 'Tasks' section is active, displaying a list of tasks with columns for 'Task', 'Folder', 'Due Date', 'Repeat', 'Priority', and 'Action'. The tasks are grouped by importance levels: 4, 3, 2, and 0. A tip at the bottom left suggests clicking the 'Organize' menu to setup folders, contexts, goals or locations. The status bar at the bottom indicates 'Displayed Tasks: 8 active and 0 completed.'

Task	Folder	Due Date	Repeat	Priority	Action
<b>Importance Level: 4</b>					
<input type="checkbox"/> <input checked="" type="star"/> Finish report	No Folder	no date	None	2 High	<input type="checkbox"/>
<input type="checkbox"/> <input checked="" type="star"/> Call Bill	No Folder	no date	None	2 High	<input type="checkbox"/>
<b>Importance Level: 3</b>					
<input type="checkbox"/> <input checked="" type="star"/> Update web home page	No Folder	no date	None	1 Medium	<input type="checkbox"/>
<input type="checkbox"/> <input checked="" type="star"/> Find exercise guide	No Folder	no date	None	1 Medium	<input type="checkbox"/>
<input type="checkbox"/> <input checked="" type="star"/> Call Jim about deadline reset	No Folder	no date	None	1 Medium	<input type="checkbox"/>
<b>Importance Level: 2</b>					
<input type="checkbox"/> <input checked="" type="star"/> study new tax laws	No Folder	no date	None	0 Low	<input type="checkbox"/>
<input type="checkbox"/> <input checked="" type="star"/> update software	No Folder	no date	None	0 Low	<input type="checkbox"/>
<input type="checkbox"/> <input checked="" type="star"/> figure out login problem	No Folder	no date	None	0 Low	<input type="checkbox"/>

## Going Beyond Outlook?

In many ways, once configured for MYN, Toodledo even goes beyond Outlook. How? First, its integration with the corresponding iPhone and iPad Apps is seamless. Next, as a web application, it is well implemented, with no task feature degradation across platforms or clients (unlike the web or Mac versions of Outlook, which have limited task capabilities). Furthermore, you can convert e-mails to tasks from *any* email system. It uses start dates correctly, and it has a correctly implemented due date field (Outlook's is broken once you use the start date), with multiple views to track impending due dates. And it even has more emerging types of task features than Outlook does; for example, the mobile versions have location mapping of tasks.

With all these advantages, I think some Outlook users will decide to switch to Toodledo for all their tasks needs. I am not talking about *syncing* with Outlook tasks, but rather using Toodledo *instead* of Outlook tasks, even if you now use Outlook. Because of its strong cross-platform and mobile capabilities, Toodledo may be a way to go for some of you. In fact, as an experiment, in September, I switched my main tasks list from Outlook into Toodledo, and I have been managing all my tasks in Toodledo since. I feel I have been just as productive compared to when using Outlook tasks, so you may want to consider trying that too; especially if you want MYN tasks on a mobile device.

### Caveats

Don't give up on the PC version of Outlook tasks yet of course; the tight integration of tasks and e-mail and calendaring in the full PC Outlook client is still second to none. You'll also notice when using Toodledo that some things just don't work as well as in Outlook. For example e-mail conversions do not support HTML and some file types do not attach. And Toodledo on the PC or Mac is web-based so not as smooth—a full client like Outlook will always perform better. Therefore, if all your task needs can stay inside the Outlook PC client, I'd remain there—especially since the excellent ClearContext software is available there. And do not expect your IT department to support Toodledo; Outlook is the safer bet if you need such support.

But if you need to stretch your task management even a little beyond the tight Microsoft client ecosystem, say to a non-Microsoft mobile device, or across platforms to Apple, Android, or Linux devices, Toodledo could be a preferable way to go. And if you are using a Mac and thinking about using Outlook 2011 for tasks, I'd say Toodledo is probably the better way to go—it has far more task features than the Outlook client (I'd still use Outlook 2011 for e-mail, calendar, and contacts though!).

### What's in the 3 Parts

What follows, in 3 parts, is a full write-up of the web-based client—including how to activate and use it for MYN task management. Also included in Part 3 is how to configure and use the separate Toodledo app software on the iPhone/iPod and iPad (if all you want to use is the mobile iPhone/iPod or the iPad app version, feel free to jump right to Part 3).

Part 1 is an overview to see if you might like Toodledo with MYN. It shows you where it fits mobility-wise, how it works, how to open an account, how to enter tasks, and how to do some basic navigation and how to activate the MYN settings.

In Part 2, I show you some optional configurations and how to convert e-mails to tasks.

In Part 3, I show you how to use the Toodledo iPad/iPhone software and configure it for MYN.

## Part I: About Toodledo Task Solution

### Overview

Toodledo is a web-based and app-based software that has one and only purpose: to manage your tasks, and do it across platforms. In fact, I call Toodledo a [Task Server](#) since it works so well across platforms.

Many of you may have tried other web-based and app-based task managers—there are a lot of them. Apps like Remember the Milk (RTM), Taska, 2do, Tasktask—even Google’s Gmail has a task application. Over the last year I have tried these all and more, and Toodledo clearly is the best for MYN.

Why is it the best for MYN? It includes a start date field—the start date field is a key enabler of the MYN system and many task managers do not include it. It allows descending date sorting, which many do not. You can hide tasks with future start dates. And the way it converts emails to tasks is powerful, flexible, and easier than others.

### Cross Platform Mobile Solutions

Some points about the cross-platform capability.

First of all, next to Exchange, I think Toodledo is your best bet as a [task server](#)—it’s a great way to store tasks in the cloud and access them from various devices.

However it is not for everyone; Toodledo will cover many but not all your task management needs.

For example, while Toodledo runs well in browsers on Android, you really are better off if you have a large screen (a tablet or a 4.3 inch smartphone for example) for best comfort using it in a browser. The app Pocket Informant works with Toodledo on smaller screen Android smartphones, but you give up a bit compared to the more complete web interface. And note an Android app called [TouchDown](#) is a better choice if you want to sync with tasks on Exchange—it even has ways to directly convert emails into tasks.

So you will want to look at your task server and mobile OS needs to decide which approach to take.

Here’s a table that summarizes all my mobile software recommendations across platforms (it assumes you need over-the-air syncing of tasks in all cases). How you serve your tasks and use them at work is shown at the top, and the mobile OS platforms are shown on the left.

## Best Mobile Solutions for MYN Tasks

	At Work: Any E-mail System Tasks Server: ToodleDo	At Work: Outlook w/ Tasks Tasks Server: Exchange
<b>Mobile OS:</b> iPhone/iPad/iPod	<i>ToodleDo app</i> or ToodleDo Web in Safari	TaskTask app
<b>Android Phone or Tablet</b>	<i>Pocket Informant app</i> (smartphone), or ToodleDo Web via web browser	<i>TouchDown app</i> using ActiveSync
<b>Windows Phone 7</b>	ToodleDo Web via web browser	Appa Mundi Tasks (not MYN compliant yet)
<b>Windows Mobile 6</b>	ToodleDo Web via web browser (not ideal though)	<i>Pocket Informant app</i> with ActiveSync
<b>BlackBerry Tablet or Phone</b>	Tablet: ToodleDo - web browser Phone: PocketInformant app	ToDoMatrix app
<b>HP Web OS</b>	Done! App, or ToodleDo via web browser	TBD

As you can see, you can use either Exchange or ToodleDo as your main tasks server, but ToodleDo offers both more at-work choices and more mobile choices.

You may have noticed that I have no recommended solutions if you are using Outlook without an Exchange server. Unfortunately, there is no great way to go mobile in that scenario, other than direct syncing (plugging your handheld into your computer or local Wi-Fi)—which greatly limits “mobility.” ToodleDo *does* have an optional 3<sup>rd</sup> party tool that is an Outlook sync solution in some situations (it is a solution by Chromatic Dragon mentioned on the ToodleDo website), but it is unsupported and I do not recommend it.

### Finding ToodleDo and Creating an MYN Preconfigured Account

Okay, assuming you want to try ToodleDo, parts 1 and 2 are all about the web version. You access the web version by going to [ToodleDo.com](http://ToodleDo.com) and opening an account there. Then you can activate a set of preset MYN Configurations. Go to [www.michaellinenberger.com/TD.html](http://www.michaellinenberger.com/TD.html) for full instructions on how to activate the MYN preconfigurations.

The software is free in its base version, though I recommend you eventually upgrade to the \$29/yr ProPlus version because it has some important add-on features. I make no money from this by the way—I am supporting this software purely because it fills a much needed space for my clients. You can easily start with the free version and use it for a while to see how it works—95% of the features you will need are in the free version.

To even *look* at ToodleDo, you need to create that free account—it takes 30 seconds, so do it now. Go to the [ToodleDo website](http://ToodleDo website) now and click the Register button (shown below).

Then enter an e-mail address and a password to create your account.

### First Task View

After you create an account, here is what you see—a new, blank, task list with default settings.

After you log in to your new account, but before you start entering tasks, if you have not done so yet, now is the time to activate the MYN configurations. To do that, in the same browser as your logged-in ToodleDo page, go to this link: <http://www.toodledo.com/systems.php>.

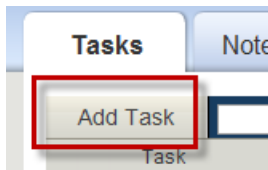
You'll then see a page that describes "Linenbergers MYN Task System" and that asks you to click a box adjacent to Apply These Settings, and then Save Changes. Note, after you click the Save Changes button, the check mark next to Apply These Settings will clear; but that's OK—you're done. You should also see a small message appear above the whole box that says Your Account Has Been Updated. Everything is complete.

Now simply click the Tasks tab above the task list, and you'll be all set.

## Trying Out the Software

### Adding a Task

To add a task, just click Add a Task just below the Tasks tab:



A light blue task form opens up (see below). Type a task name like “Test Task” and set the start date to today; enter no due date, and set the priority to “2 High”. Type a short sentence into the notes section. See sample below:

A screenshot of the 'Add Task' form. The form has a light blue background. At the top, there is a text input field for the task name, containing 'Test Task'. To the right of this field are two links: 'Add multiple tasks' and 'Import tasks...'. Below the task name field are several input fields: 'Start Date' (containing 'Aug 29, 2011'), 'Due Date' (empty), 'Repeat' (a dropdown menu set to 'No'), 'Repeat From' (a dropdown menu set to 'Due Date'), and 'Priority' (a dropdown menu set to '2 High'). Below these fields is a text area for notes, containing the text 'Here are some notes!'. At the bottom left of the form is a 'Save' button.

Then click the Add button in the lower right of the green form to add the task to your list. Note that when you do, Toodledo displays a task entry with the full note shown, all in green.

Priority ^	Task	Start Date	Due Date	Repeat	
<input type="checkbox"/> 2 High	Test Task Here are some notes!	Today	no date	None	

This green format is just a temporary display to highlight the just-added task; it allows you to check the task’s content and possibly edit it. That format will go away once you navigate away from this view, or refresh the screen. For example, click the refresh button on your browser—you’ll see that will put the task in the normal mode where the notes are hidden (see below).

Priority ^	Task	Start Date	Due Date	Repeat	
<input type="checkbox"/> 2 High					
<input type="checkbox"/> 2 High	Test Task	Today	no date	None	

Later, should you want to see the full notes for this task, click the notes icon at the far right; it looks like

this: Clicking that opens the notes field for viewing or editing.

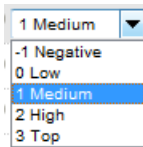
If you have no notes, the icon looks different. For example, add a task now with no notes, refresh your browser, and notice how the icon looks—it is an empty page with a single gray line on it.



You can click it to add notes to a note-free task.

By the way, showing the task fields and notes inline is the only way “open” a task—there is no way to open a task in its own window, say, by double-clicking the task. Since all fields are editable inline, there really is no need to open a separate task editing window. And if you have a long notes entry in a task, say a long e-mail that you converted to a task, the notes section just gets much bigger when you show the notes.

Try entering a few more tasks now. Per MYN principles, always set a start date, and only set the due date if it really has a deadline. As to priority levels, Toodledo comes with five levels as shown here:



But MYN only uses three: High, Medium, and Low, so stick with those three for now. I give suggestions on how to use the others in my blog posts.

Create your tasks manually for now—I’ll show you how to convert e-mails to tasks later—it takes a small amount of configuration first.

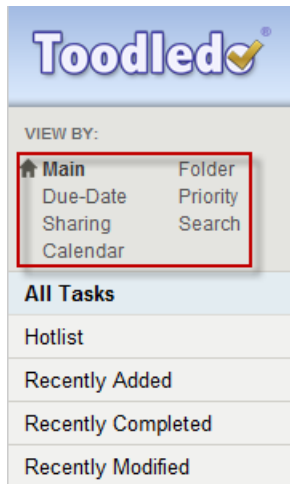
Editing tasks is simple— in the list view you just click on the field (or exposed notes field) and start typing. Changes are automatically saved when you click off the field or refresh your browser screen. Try that now too, for practice.

## Navigating Around Toodledo

The Toodledo web software is easy to use and very powerful. However there is one thing confusing about the web version of Toodledo, as compared to the iPad or iPhone App versions. That’s the large number of task views that are available in the web version; there are over 30 possible task list views, so you may get confused as to what these views are for and which view you are in. That said, this represents a lot of flexibility. And choosing the right view is easy to understand once you see an overview and use it once or twice; you’ll probably only use one or two views anyway. So let’s explore how to navigate around the major views and tabs.

### The Main Views

Look at the top left of the Toodledo screen and you’ll see there are seven top-level views names: Main, Folder, Due-Date, Priority, Sharing, Search, and Calendar. And then you’ll see some choices below that. See the top-level menus highlighted in the red box below.



Clicking on one of these top-level view names activates that view category and changes the display of tasks in the tasks list. It also (usually) activates a new list of view-specific choices in the area below it. Each of those choices is really another view in itself.

Within this collection of views there is one especially confusing point that I want to clarify right now: the choice called All Tasks at the middle left actually appears in 4 of the 7 top-level views, and it can display a different task list in each of those. So for example the All Tasks choice under Main will probably display tasks differently than the All Tasks choice under Folder. So, when using the All Tasks tab, just make sure you glance up and confirm which top-level view is active (the active one is colored black). That's probably the only really tricky point in using this navigation section.

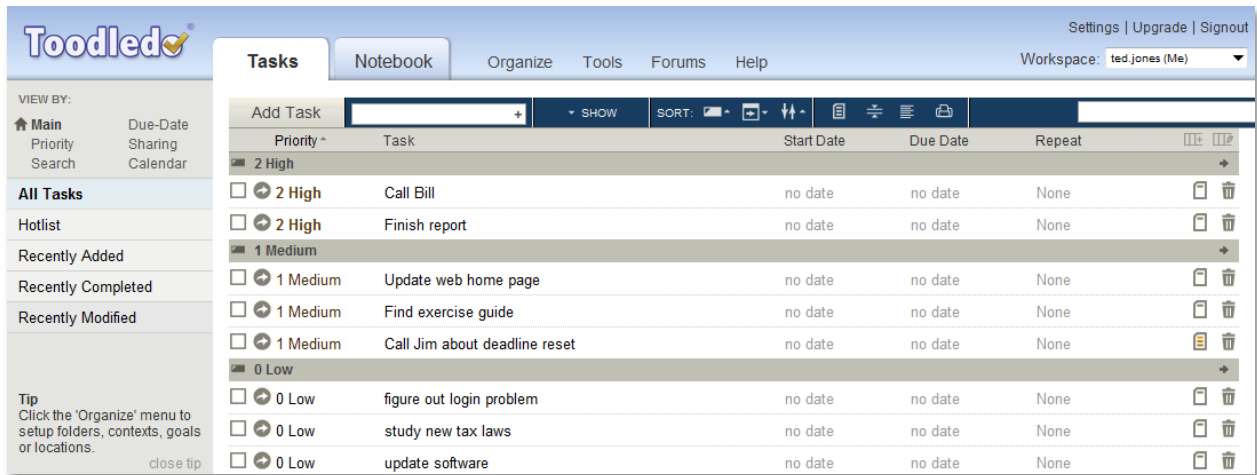
I could write many pages about what all these 30 views do, but for now, let's focus on the one view you will need as part of the MYN system.

## Main View, All Task

Currently, I recommend you use the Main view with the All Tasks choice. It matches the view in the iPhone and iPad versions, and is the easiest to use.

To see the Main view, click on Main, just below the View By: label at the top of the screen, as shown above. Then click on the All Tasks selection below it.

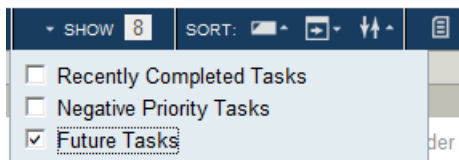
Once this view is filtered and sorted per the MYN configurations, it will show tasks in a way that roughly matches the Outlook MYN To-Do Bar configurations, as shown below. You will see groups of High, Medium, and Low (see below).



In MYN, these correspond to Critical Now tasks, Opportunity Now tasks, and Over-the-Horizon tasks. You can watch [this video](#) if you are new to MYN and want to learn more.

### Temporarily Turning Off Filters

Out of the box, the views I just showed you hide future tasks, which is a core element of MYN for scheduling future activities. They also hide completed tasks. But unlike Outlook, toggling on a view of future or recently completed tasks is really easy in Toodledo, and I encourage you to do it a lot. For example, let's say you want to look ahead and see what tasks are going to start tomorrow. To do that, just click on the SHOW button and click the check box next to Future Tasks.



Hiding future tasks again is easy—just clear the check box.

### Wrap up

So that's the overview of the Toodledo web application, and how you can use it for MYN. In Part II I'll also show you more about how to use the Toodledo features.

## PART II- Converting E-mails to Tasks in ToodleDo, and More

If you have read my books, you probably know I believe strongly in converting e-mails to tasks. Doing that is THE way to get control of an out-of-control in-box. If you try to use your in-box as a task management system, you will fail miserably. For more on this topic, see chapter 7 in the book *Total Workday Control Using Microsoft Outlook*. Or see page 104 in the book *Master Your Workday Now!*

One reason I selected ToodleDo as my web and iPad/iPhone task system of choice (over many other choices) is that it's method of converting e-mails to tasks is easy and versatile, and it works with any e-mail system. And while that method is similar to other web-based task managers like Remember the Milk, I think ToodleDo's is much simpler.

Here's how you convert e-mails to tasks in ToodleDo.

When you get an e-mail that you want to convert to a task, you merely forward the task to a specific email address that is created for your account (I'll show you how to get that address in a moment). I put that email address in my contacts list with the name ToodleDoTasks, so all I have to do is type "Too" and the mail system auto-fills the rest.

Then, retype the subject line of the forwarded email to match an action phrase. And here's the final step; after the end of the subject line, after a space, type one exclamation point for medium tasks, and type two for high priority tasks. For example "Call Ted about quarterly report !!" will convert to a high priority task when you send it in.

Once you click Send in your mail system, the e-mail is forwarded to ToodleDo and appears as a new task in you ToodleDo task list. The body of the e-mail becomes the body of the task (though HTML is not supported). You will see the default date values in your task—the ones that are part of the MYN configurations i.e. start date = today, due date = none. And per these settings, if you do not enter an exclamation point in the subject line, the task defaults to a medium priority task.

By the way, the ToodleDo servers are extremely fast—you'll see the task appear in your task list within a few seconds after sending it.

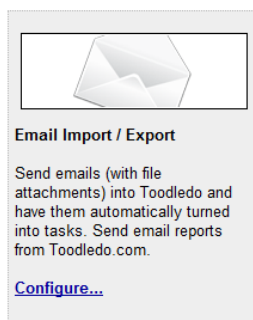
One important point. If you want ToodleDo to include attachments that were in the original e-mail as attachments in the new task, you'll need to purchase the full ProPlus upgrade (the regular Pro upgrade does not include this). In my opinion, this is the main reason to do that upgrade, and it is well worth it (again, I make no \$ off those upgrades or in any other way from ToodleDo—I just like their software). Click the Upgrade link in the lower left margin of the web application to learn more.

You should note there is a glitch with the ability to convert e-mails with attached files; not all attached file types will pass into the new task. Specifically, the .msg (PC) and .eml (Mac) file types will not pass through the ToodleDo server—they are stripped off. That's unfortunate as these are the file types of an Outlook saved e-mail. So if you use Outlook, you cannot attach a full e-mail message as a file and reply to it later—something I do a lot in the full PC-Outlook client. The ToodleDo team is working on fixing this bug.

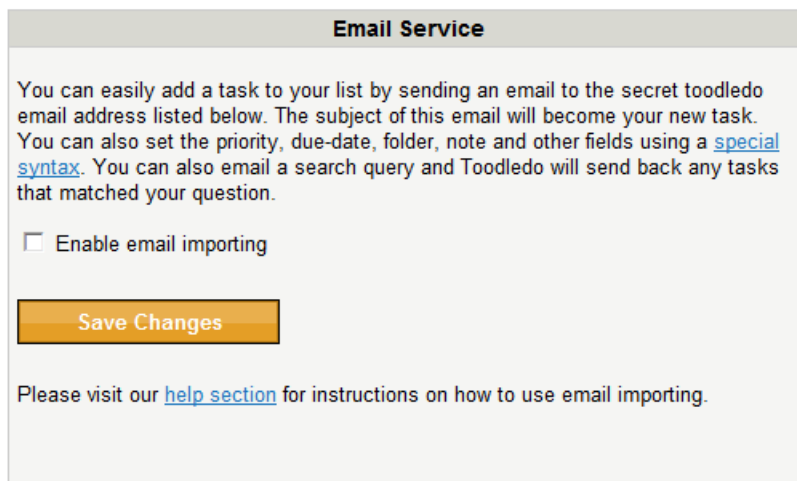
Other limitations: the body of the task cannot display HTML (as mentioned above). And all attachments are stored in one location, so you cannot have two emails with the same attachment name. Again, for this and other reasons, Outlook (Windows) may be a better solution for you if you can use it.

### How to Configure and See Your Toodledo E-mail Address

The special email address you use to convert emails to tasks is not created for you until you configure the e-mail import capability. This is NOT part of the special preconfigurations, so you'll still need to do this. To do that, click on the Tools menu at the top of the task list, and then click More.... In the window that opens, right near the top, you'll see an Email Import/Export box that looks like this:



Click on the Configure... link inside. You'll then see this window:

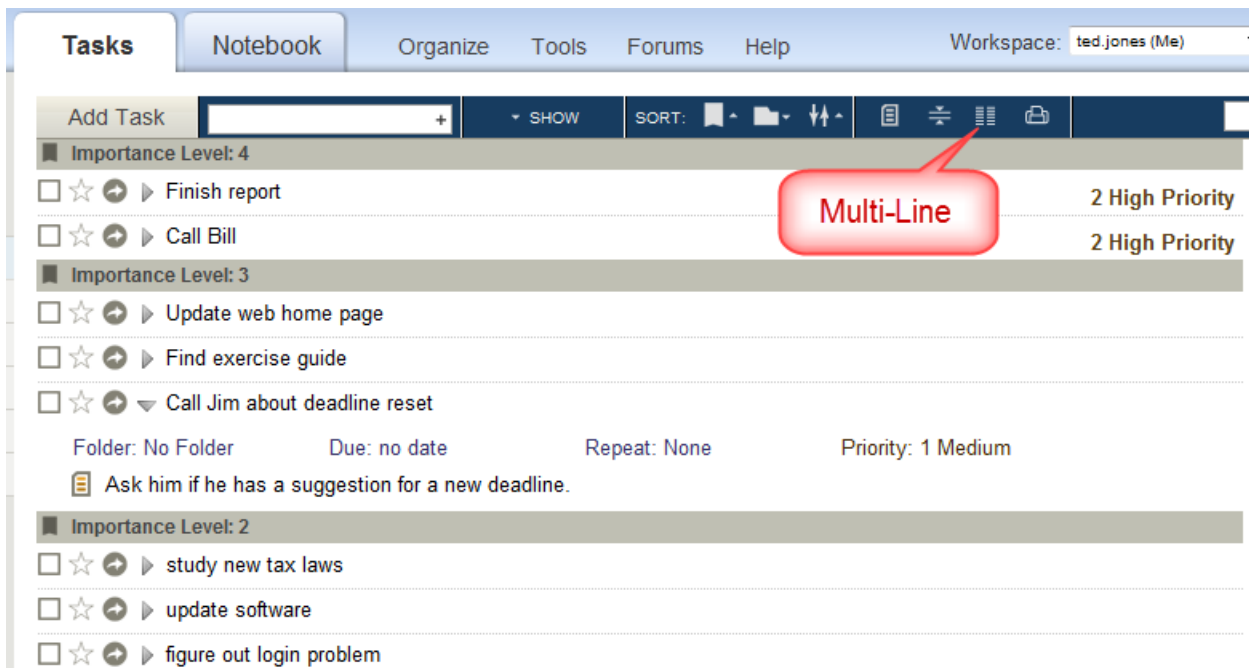


Click the Enable Email Importing checkbox, and then click Save Changes, and you'll see an e-mail address appear above the green Save Changes box—that's your unique send-in address. Immediately copy that address into your contacts list and save it with the name ToodledoTasks, or something similar. From now on, converting e-mails to tasks is a cinch (just use the instructions described above). If you lose the e-mail address, you can come back to the screen above; it's always saved.

By the way, when converting e-mails to tasks, there are a lot of other things you can do with other codes in the subject line (beyond just exclamation points). I rarely use most of them but if you'd like, you can read about those things [here](#). The one there you are most likely to use is setting a start date in the tasks different from today. The code for that is ">" followed by the date, like this: ">12/21/2010". Just type it after the exclamation point (leave a space in between). So an example forwarded e-mail subject line for a high priority task starting on 12/21/2010 is: "Call Bill and get report !! >12/21/2010"

### Displaying Mutli-Line Format

In Toodledo, there is an alternate way to list all tasks in all your views—it's called Multi-Line format. It becomes especially useful once you start adding more columns and your view gets wide. It's also useful if you use Toodledo's web version on a tablet or smartphone. Here's how it looks:



The key difference is the little triangle next to the task name. It's useful because it hides nearly all fields until you toggle the triangle—only then does it show them as added lines. See the task above labeled Call Jim...—it's been expanded. The main benefit of this format is it simplifies the screen and allows you to use a narrower window width without hiding fields or icons—that may be useful on a small tablet or smartphone screen for example.

It's easy to switch between this view and the normal Grid view—just click the Multi-Line Format icon at the top of the window, as shown above. Try it out and see how you like it.

### Pro-Plus Membership

I mentioned above that sending emails with attachments come only with Pro-Plus membership. There are many more features added when you upgrade. To see the full list, go to [this link](#). Once you do

upgrade, to access many of those features you'll need to turn them on. Here is a list of those features that I think you may want to use with MYN.

*File uploads* allows you to add attachments directly to tasks already in Toodledo. Nothing to configure here—you just add attachments by clicking the paper click envelope that appears at the right end of each task. Note that *Attachment in Emails* converted to tasks is the main advantage to this—if there is one in the e-mail you convert it will be automatically passed to the task once you convert it.

*Delete Completed Tasks*: Find the entry for Delete Completed Tasks, and set that to 2 years or more. Why the long timeframe? Sometimes completed tasks contain reference information you may need much later. Use the Recently Completed link in the left margin to see recent ones, and use Search to see older completed tasks.

*Encryption*: Consider turning on encryption if you are concerned about passing tasks over the internet (the Toodledo documentation says to expect a 30-50% performance degradation if you do).

## Optional Tools

There are a number of other optional tools you may want to use.

### Start Using the Arrow Icon

After you get good at using the system, you can start using the Arrow icon for deletions. The Arrow icon is the second item from the left in all tasks.



Click it, and you will see the delete command there, among other commands. Once you start using that, you can remove the Trashcan column to make more room in your column list if you like.

The Arrow Icon also shows you a command or two added by the paid subscription.

### Folder and Goals

Another field change you may consider adding the Folder column back in, as well as the Goals columns. They give you a way to manage tasks in groups. I use the Folder field as a projects tag—you may want to do that too. You add them by clicking the Add Columns button at the right edge of the label bar just above the task list, and then checking them into the list.



(the Add Columns button)

Then, you create your Folders and Goals lists using links in the left margin, and then you apply them from within the task. I'll write more about them in future articles.

## **Due Date Views**

After using the system for a while, you may want to use the Due Date management views. These allow you to track upcoming deadlines. This is a great feature of ToodleDo compared to Outlook—Due Dates actually work right!

If you start using the Due Date fields, or Goals, or Folders, then I recommend you set the sorting correctly in those views, per the following instructions.

## **Other Optional Settings to Consider**

*Reminders and alarms* are practical since the Due Date field is not linked to the Start Date field (as it is in Outlook). So feel free to experiment with the reminders features. They do take a bit of study to understand. And their power increases with the membership upgrade.

*Collaboration*: consider exploring the ability to share tasks with others; this is useful if you, say, have an assistant who is monitoring your task list. Also dependent on membership level.

*Locations*: I have not tried this yet, but consider using locations, if you have an iPhone or iPad, as a way to see which tasks are applicable to do based on your location. Lots of potential here. Again, the power here is dependent on the membership level.

That's all the configurations!

## Part III: Toodledo iPhone and iPad Apps

### Introduction

The iPhone and iPad apps must be manually configured—there is no automatic MYN account set-up like in the Web version. Luckily though, these apps are much easier to manually config then the web version. They don't have all the power of the web version, but they are still surprisingly useful. And best of all, they accept all the MYN features.

### Get the Right App

Toodledo is available in two separate apps. Make sure you select the correct one at the Apple App Store; you'll definitely want the iPad version if you are using and iPad, as it takes full advantage of the larger screen.

### The Home View

Toodledo opens in the Home view, which shows a list of the top level views similar to what is listed across the top of the web version, as shown below (I'll be using iPad screenshots in all the examples, but the iPhone is very similar). You use this view primarily as a launch pad to select your task view.



We will be using the All Tasks view exclusively, so click the top item. You can also use the Priorities view, but in the iPad and iPhone versions, the All Tasks view works better. That's because the reverse sort feature is available, as you'll see in a moment.

## Configuring the App

### Synchronization

You can start using the iPhone or iPad app independently from the web version, but it is much better to link the two. So, after downloading and starting the app, the first thing you may want to do is link it to your web version.

You do that by clicking the Settings button at the bottom of the screen and then choosing Synchronization on the left. In the window that opens, enter your Toodledo e-mail login address and your password (tap Enter Account Login if needed to see that) and then click Save. Toodledo will immediately start to synchronize your tasks, and it does so quickly.

Before you leave this synchronization screen, make sure you set two settings as shown below; set Sync on the Startup to ON and set Sync on Edit to ON.



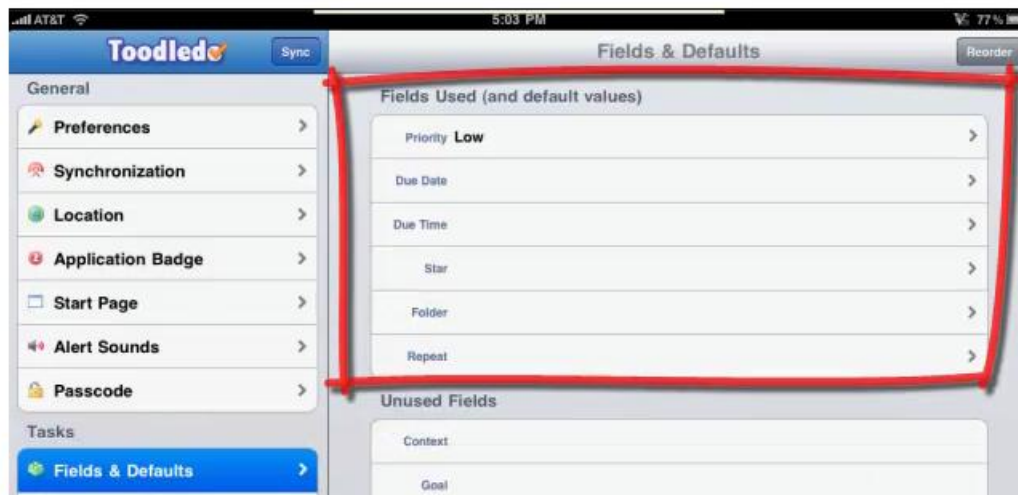
### Configuring the Default View

Next, set the default view to All Tasks. You do that by selecting Start Page in the settings menu. Click on the all tasks choice at the right to place the checkmark there.



### Configuring the Field List

Next, we're going to edit the list of fields that is displayed and change the default values for two of those. You do that by selecting the Fields and Defaults choice from the settings menu (see below). In the window that opens, the top portion represents the current field list. In older versions you edit that list by clicking the Reorder button in the top right corner of the window; once you do that, the fields are draggable. Newer versions they are draggable by default



So, tap at the right end of the fields (on the triple bars) and drag down the fields you do not want in that list. In this case we will drag Due Time down to the unused field section; do the same with Star and Folder (you may want to add Folder back in later once you start using that feature—use it like a Projects tag). Then drag Start Date up so it sits below priority. Here's how it should look; in older versions click the Done button when finished.



### Configuring the Field Defaults

Next we are going to set the field default values for priority and start date. Priority is set to a default of low out-of-the-box, we change that by clicking the arrow at the right end of the field and choosing medium priority.



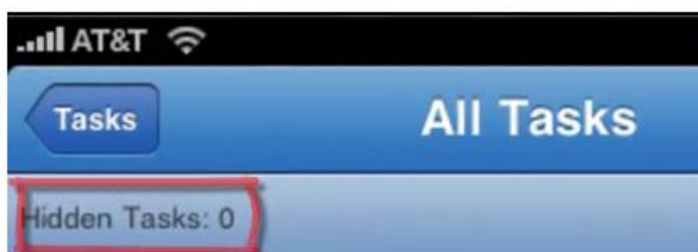
Do the same for start date, set it to today.

### Hiding future dated tasks and completed tasks

The way you set filtering is a little tricky. You don't do it in the settings window; rather you go to the tasks view. So let's do that now.

Click the Tasks button at the bottom of the window. Then click the All Tasks view from the home screen.

Here's the tricky part. At the top of the All Tasks view you'll see a light gray label called hidden; see below.



Tap the word Hidden; note, it may be hard to tap it on the small iPhone screen—you may hit the Tasks button above it a few times before you get it. Below is what you should see if you tap it correctly.

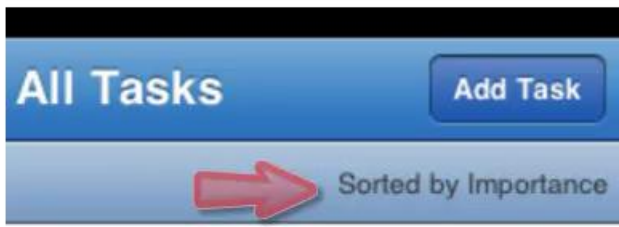


Once you see that, tap the Hide button in the Completed Tasks section, as shown above. Then tap the Hide Future in the Future Tasks section at the bottom.

Click Done.

### Sorting Tasks per MYN

Back at the tasks list do the same with the Sorted By label in the upper right of the task list:



In the window that opens, in the First Sort By section at the top, change the sorting to Priority with a down-arrow next to it:



Next, scroll down to the section below that labeled Then Sort By, change the sorting to Start Date, again, with a down-arrow next to it as well (see below).



Do nothing in the next Then Sort by section. Click the Done button when done.

You are now done with the MYN configurations!

### **The Rest is Self-Explanatory!**

That's the beauty of an iPhone or iPad app, they are so easy use. So things like adding tasks, editing tasks, marking tasks complete; all this is self-explanatory, and I leave this to you.

Good luck!

