

# White Paper: Using Toodledo Task Management Software, and Configuring it for the Master Your Now Task System, Version 1.2 Jan 26, 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 [Got To Do](#), and in a browser), with full synchronization across all.

But it takes a little study to understand and use this software for MYN, so I've created a four part article series to show you how; this is the first of those four parts. The rest follow below.



The screenshot shows the Toodledo web interface. The top navigation bar includes 'View By: Main | Due-Date | Priority | Sharing | Search | Calendar' and an 'Add a Task' button. Below this is a tabbed interface with 'All Tasks' selected. The main content area displays '15 To-dos sorted by Priority' with a table of tasks. The table has columns for Priority, Task, Start Date, Due Date, and Repeat. The tasks are grouped by priority: 2 High and 1 Medium.

Priority	Task	Start Date	Due Date	Repeat
<b>2 High</b>				
<input type="checkbox"/>	Study Toodledo	no date	no date	None
<input type="checkbox"/>	Install the iPad Version of Toodledo	no date	no date	None
<b>1 Medium</b>				
<input type="checkbox"/>	Find reviewers	Oct 08	no date	None
<input type="checkbox"/>	buy laest copy of DreamWaver	Oct 15	no date	None
<input type="checkbox"/>	Create Outline of Mac book	Oct 18	no date	None

## 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 4 Parts

What follows, in 4 parts, is a full write-up of the web-based client—including how to configure and use it for MYN task management. Also included in Part 4 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 4).

Part 1 of this series (in this article) 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 do some basic navigation.

In Part 2, I show you how to manually enter the MYN configurations in the web version, and how to use them.

In Part 3, I show you some optional configurations and how to convert e-mails to tasks.

In Part 4, 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.

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? It includes a start date field, which many other task managers do not—and that’s important for MYN. It allows descending date sorting, which many do not. 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. ToodleDo covers many but not all your needs.

While ToodleDo runs well in browsers on Android, you really are better off if you have a large screen (Galaxy Tab tablet, or a Droid X smartphone for example) for best comfort. And note an Android app called [TouchDown](#) is a better choice if you want to sync with tasks on Exchange—as an app it’s easier to use and it configures well for MYN—I’ll have an article about that later.

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

### Best Mobile Solutions for MYN Tasks

	<b>At Work: Any E-mail System and Tasks with ToodleDo</b>	<b>At Work: Outlook w/ Tasks (Tasks on Exchange Server)</b>
<b>Mobile: iPhone/iPad/iPod</b>	<i>ToodleDo app</i> or ToodleDo Web in Safari	TaskTask app
<b>Android Phone or Tablet</b>	<i>Got To Do</i> app (smartphone), or ToodleDo Web via web browser	<i>TouchDown</i> app using ActiveSync
<b>Windows Mobile 7</b>	ToodleDo Web via web browser	No over-the-air solution yet
<b>Windows Mobile 6</b>	ToodleDo Web via web browser (not ideal though)	<i>Pocket Informant</i> app with ActiveSync
<b>BlackBerry Phone or Tablet</b>	Tablet: ToodleDo - web browser Phone: PocketInformant sync	ToDoMatrix app
<b>Palm Web OS</b>	ToodleDo via web browser	TBD

As you can see, if you don't use Outlook, using ToodleDo Web as your main tasks program offers the most consistent cross-platform solution.

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 a 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 through 3 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 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.

In case you for some reason do not want to use the [preconfigured MYN settings](#), I will show you how to manually configure ToodleDo for MYN below.

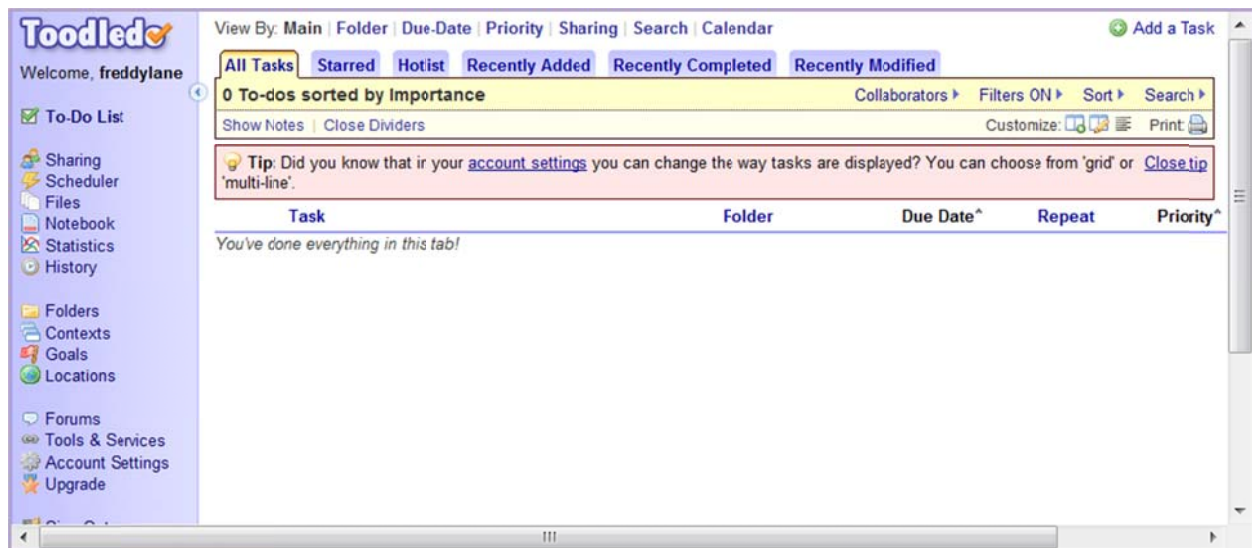
To even *look* at Toodledo, you need to create that free account—it takes 30 seconds, so do it now. Go to the [Toodledo website](#) now and click the Register button (shown below).



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 To-Do List link near the top of the left margin, and you'll be all set.

Next, scroll down to the heading below called Trying Out the Software.

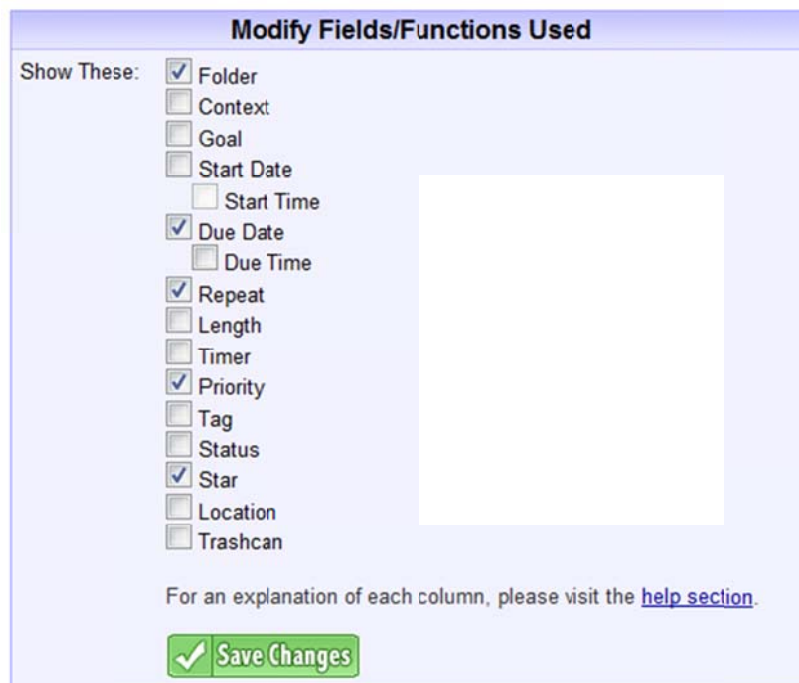
If instead of taking the MYN preconfigurations, you want to make the settings manually, follow the steps below.

## Setting the Fields/Columns list

If you want to create the MYN configurations manually, the first step is to find the Add Columns button; it's the first of the three icons just to the right of the Customize label (these are located in the middle, right). Here is an image (note: hovering over buttons displays their names).



Click that button and the following window opens.



**Modify Fields/Functions Used**

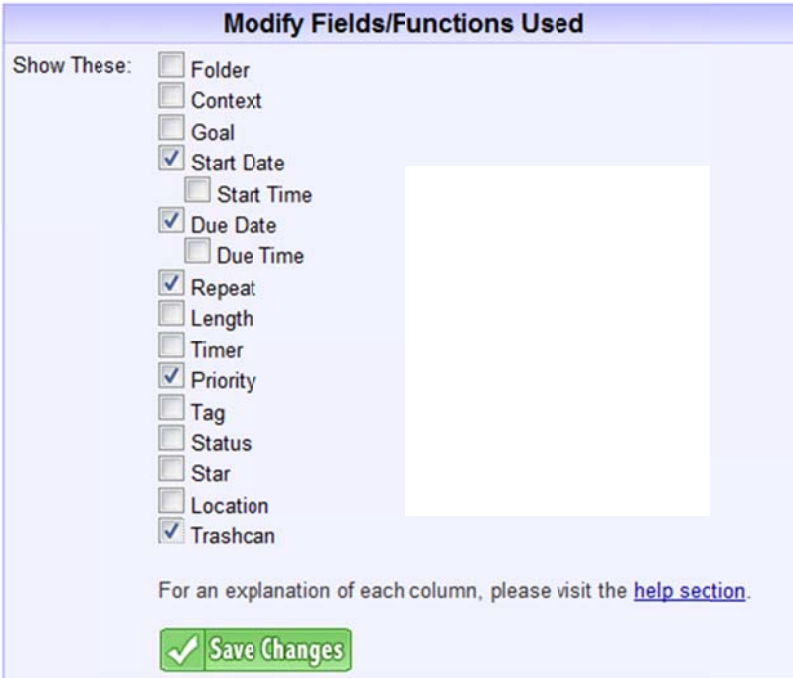
Show These:

- Folder
- Context
- Goal
- Start Date
- Start Time
- Due Date
- Due Time
- Repeat
- Length
- Timer
- Priority
- Tag
- Status
- Star
- Location
- Trashcan

For an explanation of each column, please visit the [help section](#).

Save Changes

Modify the check marks in that window so that it looks like the one below. Specifically, you will be *removing* checkmarks from the Folder and Star fields, and you will be *adding* Start Date (but not Start time). You'll also add the Trashcan to make it a little easier to delete tasks. You may be adding more fields later to support Goals and Folders, but to keep it simple at first, that's all for now.



Click the Save Changes button.

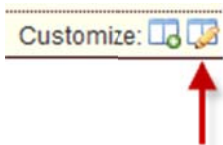
Then, to get back to the Tasks View, find the phrase “To-Do List” near the top of the left-hand column, just below the Logo as shown here:




Click it and that returns you to the Tasks view.

### Field Order

Next, we are going to change the order of fields by moving Priority to the far left. To do that, click the second button to the right of the Customize label:



This puts the column names in a drag-friendly mode so you can reposition them—notice the dark background color. After you click that button, you can drag Priority over to the left of the Task field as shown here:

Drag and drop to reorder or resize the columns. When you are done, click the  icon again, or reload the page.

Priority	Task	Start Date	Due Date	Repeat
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Then click that same button again to lock the changes in.

### Trying Out the Software

That's it for our initial changes. We'll have some more tweaks to make in a moment, but it's time to play with its features. Let's start by adding a task.

#### Adding a Task

To add a task, just click Add a Task in the upper right corner:



A green 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:

Task:  [Add multiple tasks...](#) [Import tasks...](#) [Cancel](#)

Start Date:  Due Date:  Repeat:  Repeat From:  Priority:

Note:

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 multi-line task entry with the full note shown, all in green.


Priority^	Task	Start Date	Due Date^	Repeat
<input type="checkbox"/> 2 High	Test Task This is my first task!	Yesterday	no date	None

This green multi-line 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 add another task or 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	Test Task	Yesterday	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 green plus sign 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. Set a full range of priorities as well. Create these 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 task 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 very top of the Toodledo screen and you’ll see there are eight top-level views names: Main, Folder, Goal, Due-Date, Priority, Sharing, Search, and Calendar. And then you’ll see some menu tabs below that. See the top-level menus highlighted in the red box below.



By the way, don’t let this confuse you; even though tab names on the second row are bigger and bolder and seem more important, the top line is really the main view list.

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 row of view-specific Tabs in the next row down. Each of those tabs 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 tab called All Tasks at the left actually appears in 5 of the 8 top-level views, and it can display a different task list in each of those. So for example the All Tasks tab under Main will probably display tasks differently than the All Tasks tab 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 software.

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

## Views to Use for MYN

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

### Main View, All Tasks Tab

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



Once this view is filtered and sorted as instructed in the Configuration section in Part II, 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).

The screenshot shows a task list interface. At the top, there is a navigation bar with 'View By: Main | Due-Date | Priority | Sharing | Search | Calendar' and a green 'Add a Task' button. Below this is a tab bar with 'All Tasks', 'Hotlist', 'Recently Added', 'Recently Completed', and 'Recently Modified'. The 'All Tasks' tab is selected. The main area displays a table of tasks with columns for Priority, Task, Start Date, Due Date, and Repeat. The tasks are grouped by priority: 2 High, 1 Medium, and 0 Low. On the right side, there are three red arrows pointing to the task groups, labeled 'Critical Now Tasks', 'Opportunity Now Tasks', and 'Over the Horizon Tasks'.

Priority^	Task	Start Date	Due Date	Repeat
<b>2 High</b>				
2 High	Study ToodleDo	no date	no date	None
2 High	Install the iPad Version of ToodleDo	no date	no date	None
<b>1 Medium</b>				
1 Medium	Find reviewers	Oct 08	no date	None
1 Medium	buy latest ccopy of DreamWeaver	Oct 15	no date	None
1 Medium	Create Outline of Mac book	Oct 18	no date	None
1 Medium	Write Quarterly Report	Oct 20	no date	None
1 Medium	Set meeting with Jim	Oct 22	no date	None
<b>0 Low</b>				
0 Low	Call Ted Brown about contract	Oct 04	no date	None
0 Low	Study iPad book	Oct 06	no date	None
0 Low	lookup how to use DreamWeaver	Oct 24	no date	None

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. Simply put, to view Critical Now tasks, you will click on the High tab; to view Opportunity Now tasks you will click on the Medium tab; and to view Over-the-Horizon, you will click on the Low tab. However with a new Toodledo account these are not set quite correctly and we'll configure them below.

## Priority View

You can also use the Priority view in the Toodledo web version for all your MYN work (once configured). This view allows you to see tasks that start today easier.

You get to the Priority View by clicking on the word Priority in the top-level menu. Once there, you will use three priority tabs that appear under it: High, Medium, and Low (see below).



As to the other tabs in the Main view, ignore the Hotlist tab for now, it's not really useful in MYN. The three other tabs: Recently Added, Recently Completed, and Recently Modified are self-explanatory and can be useful to you to track recently changed tasks.

## 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 Filters ON button to show the Filters toolbar (if needed), and then click the Show Future Tasks phrase. Another way to do it, if your list is short, is to click on the Turn Off Filters link at the bottom of the task list, as shown below.

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*1 active task is hidden due to your filter settings. [Turn off filters](#)*

Turning filters back on is easy—just click the Hide... phrases in the Filter toolbar. You may want to leave the Filters toolbar open all the time to make this easy. It doesn't take much space.

## **Wrap up**

So that's the overview of the ToodleDo web application, and how you can use it for MYN. In the next article, Part II, I show you how to manually configure the web version of the software in case you do not want to use the preconfigured MYN version, as discussed [here](#).

In Part II I'll also show you more about how to use the ToodleDo features.

## Part II Configuring ToodleDo for MYN

This section is all about manually configuring ToodleDo web version for MYN. There are a fair number of changes to make here. And again, you can get all these configurations automatically by following instructions at this [link](#).

You already did part of the configurations Part I of this series when you edited the field list. If you jumped right to this section then go back and make those changes now. And note, the fields you displayed there stay constant in all the views; no matter what view you are in, the fields you selected earlier are the ones you will see.

### Configuring Filtering and Sorting

However filtering and sorting settings in ToodleDo can and should be set *differently* in each of the top-level views—I'll show you how below. And one fine point: once you set the filtering and sorting inside *any* tab of a top-level view, the filtering and sorting settings are automatically set across *all the tabs* in that view.

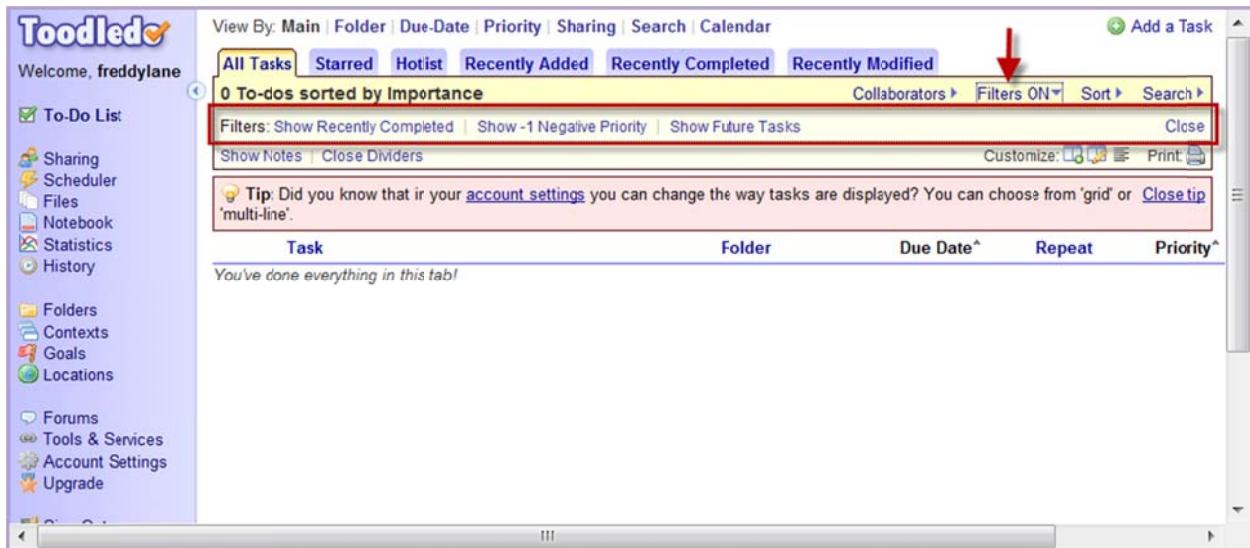
Filtering and sorting are very easy to set. And you'll likely often be changing the filtering to view your future or completed tasks, so pay attention to how you make the settings below.

#### Filtering and Sorting the Main View

In the View By top menu, click on Main button; you can have any tab active but you might as well click the All Tasks tab to match the images below.

Filtering is set correctly by default in ToodleDo. But let's confirm that, just in case you accidentally changed it.

To open the Filters toolbar, click on the "Filters ON" phrase that is located near the upper right of the window (see below); click the phrase itself or click the arrow next to it. In either case, the arrow drops down and the Filters toolbar is displayed (the toolbar is highlighted in the red box below):



In that toolbar, confirm that the three filters are all set to display the word “Show” at the start of each phrase, as in the image above (for example, “Show Recently Completed”). If any are not, click once on the phrase so that it changes to read “Show”. If you see the word “Hide,” the filter is incorrect; click again.

Once you have confirmed (or reset) the filters, you are done here, so close the Filters toolbar by clicking on the Close button at the right end of the toolbar (or click the Filters ON button, above the toolbar, again).

### Configuring Sorting in the Main view

Next we are going to set up sorting in the Main view.

Click on the word Sort near the top right to open the Sort toolbar—that button is next to where you found the Filter button (see below). That will open a Sort By toolbar, as show below.

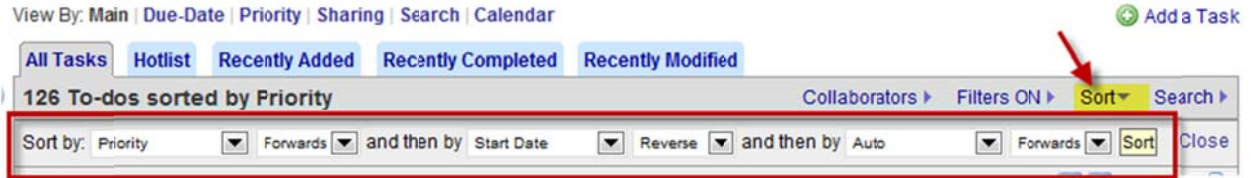
In the Sort toolbar, where it says Importance, you want to change that to Priority. Then, in the field to its right, choose Forwards; that’s the direction of sorting—Forwards means High is at the top.

To the right of that, you’ll see an “and the by” label and a field. Set that field to Start Date. This is a critical next level sort required by MYN methodology. Then, in the field to its right, choose Reverse.

Set any remaining “and then by” fields to Auto.

All that is shown below.

The figure below shows how that will look:



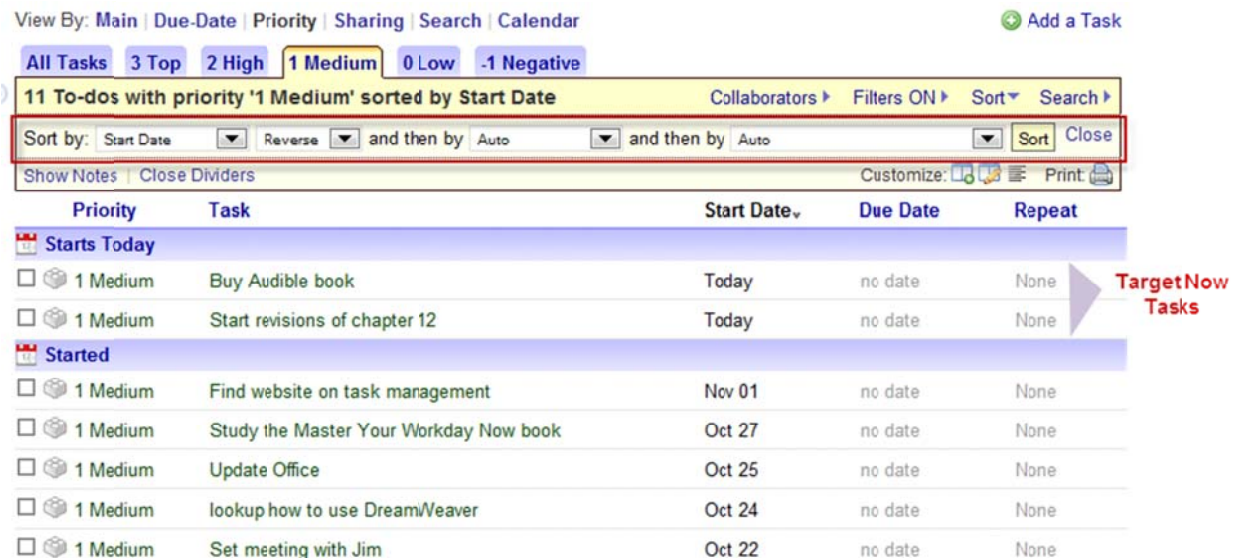
When done, close that Sort toolbar by clicking the Close button at right.

### Configuring the Priority View

Next we are going to configure the Priority View; this is the view you might use should you want to clearly see tasks that start today (per Target Now theory in MYN; see more below)

First, confirm filtering is correct as you did above for the Main view in the section titled Confirm Filters Are Set; the settings here should be identical to those shown there. Make changes to it if needed.

Then, click the Sort button and sort first by Start Date, Reverse; then sort all others by auto, as shown below.



That's all that's needed, your view is complete.

Notice once configured this way, ToodleDo highlights tasks that start today (see above). In MYN methodology, this represents the optional 4<sup>th</sup> urgency zone called Target Now tasks—I have labeled them as such above. These are tasks not critically due today, but that you would *very much* like to do today. Read more about this, if you like, in Lesson 9 of Total Workday Control, or starting at page 62 of the book Master Your Workday Now!

## Account Settings to Make

Next, we need to make some settings that are only available through the Toodledo Account Settings windows.

Click the Account Settings button about ¾'s of the way down the left margin; it has the small gear icon next to it:



A long list of settings appears as shown below. We'll be modifying a few of these, starting with the Default View.

Account Settings

Login Email:	test.one@seamaps.com	edit
	Don't get daily email reminders of important tasks	edit
Alias:	test.one	edit
Password:	(not displayed)	edit
Timezone:	Nov 13, 2010 9:28 pm	
Regional Settings:	Week starts on Sunday	edit
	Distances measured in miles	
OpenID:	Log In More	edit
Unique ID:	6941f05f8b0c6	edit
Subscription:	Free Subscription	Upgrade

Default View:	Map	edit
New Task Defaults:		edit
Fields/Functions Used:	Folder, Due Date, Repeat, Priority, Star	edit
Subtasks:	Subtasks are a <a href="#">Fix Feature</a>	edit
Show Tasks as:	Grid (One line with column)	edit
Hidden Settings:	At least a priority of 3 Top, or a due date in the next 14 days	edit
Keyboard Shortcuts:	Keyboard Shortcuts Disabled <input type="checkbox"/>	edit
Delete Completed Tasks:	After 6 Months	edit
Hide Future Tasks:	More than 6 months in the future	edit
Show Tab Counts:	Don't show the number of tasks inside each tab	edit
Color Scheme:	Default	edit

Account Activity:	<a href="#">View Activity</a>	
	<a href="#">Export My Synced Data</a>	
	<a href="#">Report Deleted Tasks</a>	
Delete Account / Data:	<a href="#">Delete all tasks...</a> (confirmation required)	
	<a href="#">Delete all notebook entries...</a> (confirmation required)	
	<a href="#">Delete all notes...</a> (confirmation required)	

## New Task Defaults

Next, in the window Account Settings window, near the top of the second section down, you'll see the item "New Task Defaults". Click the edit button to the right of that. A new section opens at the top of your browser window where you can make some entries. Make the entries as shown below.



**New Task Defaults**

To save time when adding a task, these values will be pre-set when adding a task via our website. Tasks added via email or twitter can also have these defaults applied for fields that you have left empty.

Start Date:

Due Date:

Repeat:

Priority:

Reminder:

Also use these defaults for tasks added via [email](#) or [twitter](#).

Don't overlook the "also use these defaults..." checkbox at the bottom—make sure it is checked. Then click Save Changes. You'll see that the entries are summarized on the Account Settings window:

**New Task Defaults:** Start Date: Today  
Priority: Medium [edit](#)

This setting saves time when entering new tasks because you'll find that nearly all your new tasks in the MYN system get entered with a start date of today, and a priority of medium.

### Fixed Labels

Next, a little below that in the Account Settings list, look for the entry "Show Tasks as:" and click the Edit button to the right of that. In the very top entry, from the dropdown selector, choose, "Top is fixed and Tasks scroll (experimental)" (see below).

**Modify Settings**

Show Tasks as: Top is fixed and tasks scroll (experimental)

Multi-line (several lines with a toggle button for the details)

Get an estimate

Clean my eyes

Click Save Changes

This is a nice feature once you have lots of tasks in your list. However, if you plan to use Toodledo in Safari on the iPad (as opposed to the iPad App), you may want to avoid this setting—it breaks flick-gesture scrolling there (though two-finger scrolling still works, and the iPad App works fine as well). And note it is experimental—while I can say it works in the standard browsers I have tested, it may fail elsewhere.

## How to Use These Settings

So you are now ready to really start using Toodledo to manage tasks per the MYN principles. If you are already an MYN student, what to do next should be self-explanatory, start using the system like you have used it elsewhere. There are, however, a few measures that I do not show until Part III, like how to convert emails to tasks, so do read on.

If you are new to MYN, the most thorough way to proceed at this point would be to get a copy of the book *Master Your Workday Now!* and read Part I.

Go to the Main view, All Tasks tab, and use it just like you use the MYN system in any other format, like Outlook. Keep it visible all day. Check the High group once an hour; check the Medium group once a day; and check the Low group once a week. Only put things in the High group that are absolutely due today. Things you want to work on this week or next go in the Medium priority. Anything that can wait 2 or more weeks, put in Low priority.

You can see in the figure above that Toodledo has two more priority levels and tabs in the Priority view—Top and Negative—and normally we'd ignore them in MYN. But these actually present a nice extension to MYN (compared to its implementation in MS Outlook). The extension is to use the Top priority for Significant Outcomes (SOC's are explained on page 96 of my book *Master Your Workday Now!* They are also written up in an old newsletter found at [this link](#)). Another extension is to use the Negative priority for search-only tasks—the latter being tasks that you only browse through but that never appear in your daily list—sort of a deep someday maybe list, if you are a GTD follower. I'll talk about those more in future articles.

## Wrap up

That's it for now! Later, in Part III, I show you a number of other optional settings. Some are just "nice to have's" and one important one becomes available once you purchase the optional a Pro-Plus membership.

## PART III- 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 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 that the default date values in your task—the ones you set in Part II configurations i.e. start date = today, due date = none (as long as you checked the "also use these defaults for tasks added via email" checkbox, as instructed in Part II). 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

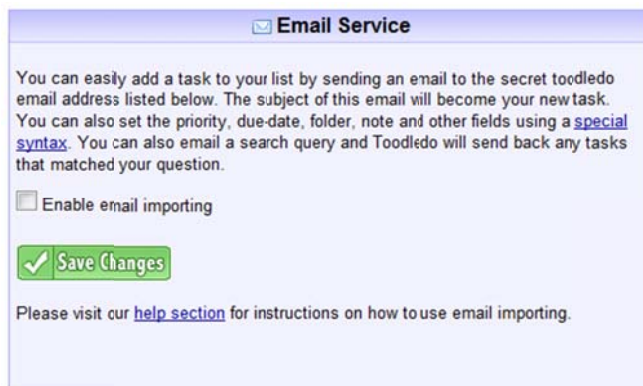
to it later—something I do a lot in the full PC-Outlook client. The Toodledo team is working on fixing this bug.

### 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 & Services link two-thirds down the Toodledo left margin. 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:

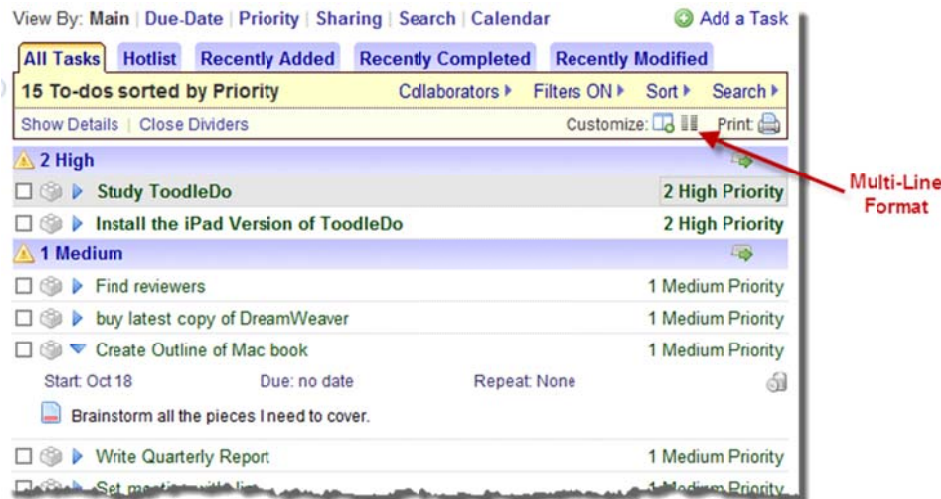


Click the Enable Email Importing checkbox, and then click Save Changes, and you'll see an e-mail address appear above the green Save Changes box—that's your unique send-in address. Immediately copy that address into your contacts list and save it with the name ToodledoTasks, or something similar. From 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—something I suggest you do in the next section called Optional Settings. Here's how it looks:



It's useful because it hides nearly all fields until you toggle the drop-down arrow—only then does it show them as added lines. See the task above labeled Create Outline of Mac book—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.

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.

*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 History link in the left margin to see older deleted tasks.

*Encryption:* Consider turning on encryption (the ToodleDo documentation says to expect a 30-50% performance degradation if you do).

## Optional Settings

There are a number of other optional settings you may want to make.

### Color Scheme

First, you may want to change the color scheme from the default purple color. You do that in the Account Settings window. Doing so changes the left margin color, and removes the yellow from the header region. I set mine to “Icy”—those colors look right to me.

### Start Using the Brick Icon

After you get good at using the system, you can start using the Brick icon for deletions. The Brick icon is the second item from the left in all tasks—it looks a little like a Lego block. 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. Just click on the Add Columns button we used in Part I to bring up the screen to remove it.

The Brick 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 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.

### Set Sorting in Optional views

If you start using optional views, you’ll need to set the sorting correctly. Below, I show you how the sort settings should look; just edit yours to match. I do not show the optional sub-sort direction settings below since they were not available at the time of this writing. But if they are available when you read this, then always set any start date fields below to *reverse* sorting.

By the way, leave the filtering set to the defaults that come with the software (we discussed those in Part II).

## Set Folder view sorting

View By: [Main](#) | [Folder](#) | [Goal](#) | [Due-Date](#) | [Priority](#) | [Sharing](#) | [Search](#) | [Calendar](#) ➕ Add a Task

[All Tasks](#) | [Website Changes](#) | [Travel Ideas](#) | [No Folder](#) [Add folder...](#)

**235 To-dos sorted by Folder** [Collaborators](#) | [Filters ON](#) | [Sort](#) | [Search](#)

Filters: [Show Recently Completed](#) | [Show -1 Negative Priority](#) | [Show Future Tasks](#) [Close](#)

Sort by: [Folder](#) | [Forwards](#) and then by [Priority](#) and then by [Start Date](#) [Sort](#) [Close](#)

[Show Notes](#) | [Close Dividers](#) Customize: [Print](#)

## Set Goal view sorting

View By: [Main](#) | [Folder](#) | [Goal](#) | [Due-Date](#) | [Priority](#) | [Sharing](#) | [Search](#) | [Calendar](#) ➕ Add a Task

[All Tasks](#) | [Improve Website](#) | [iPad Book](#) | [No Goal](#) [Add goal...](#)

**224 To-dos in goal 'No Goal', sorted by Goal** [Collaborators](#) | [Filters ON](#) | [Sort](#) | [Search](#)

Sort by: [Goal](#) | [Forwards](#) and then by [Priority](#) and then by [Start Date](#) [Sort](#) [Close](#)

[Show Notes](#) | [Close Dividers](#) Customize: [Print](#)

## Set Due Date view sorting

View By: [Main](#) | [Folder](#) | [Goal](#) | [Due-Date](#) | [Priority](#) | [Sharing](#) | [Search](#) | [Calendar](#) ➕ Add a Task

[All Tasks](#) | [Started](#) | [Overdue](#) | [Today](#) | [Tomorrow](#) | [Next 7 Days](#) | [7 to 14 Days](#) | [Next 30 Days](#) | [No Due-Date](#)

**235 To-dos sorted by Priority** [Collaborators](#) | [Filters ON](#) | [Sort](#) | [Search](#)

Filters: [Show Recently Completed](#) | [Show -1 Negative Priority](#) | [Show Future Tasks](#) [Close](#)

Sort by: [Priority](#) | [Forwards](#) and then by [Due Date](#) and then by [Auto](#) [Sort](#) [Close](#)

[Show Notes](#) | [Close Dividers](#) Customize: [Print](#)

## Set Sharing view sorting

View By: [Main](#) | [Folder](#) | [Goal](#) | [Due-Date](#) | [Priority](#) | [Sharing](#) | [Search](#) | [Calendar](#) ➕ Add a Task

[From Anyone](#) | [From Myself](#)

**235 To-dos assigned by "", sorted by Priority** [Collaborators](#) | [Filters ON](#) | [Sort](#) | [Search](#)

Sort by: [Priority](#) | [Forwards](#) and then by [Start Date](#) and then by [Auto](#) [Sort](#) [Close](#)

[Show Notes](#) | [Close Dividers](#) Customize: [Print](#)

## Other Optional Settings to Consider

*Reminders and alarms* are now 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 (I do not currently use them). 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 IV: Toodledo iPhone and iPad Apps

### Introduction

The iPhone and iPad apps are easier to 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. In fact, at the time of this writing, the iPhone and iPad app included one additional feature compared to the web version that I think is important – the ability to reverse sort on a sub sorted field. You'll see that below.

### 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.

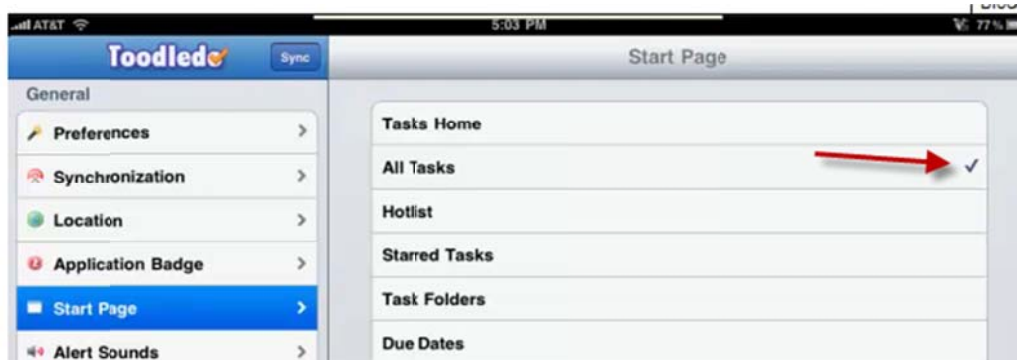
You do that by clicking the Settings button at the bottom of the screen and then choosing Synchronization on the left. In the window that opens, enter your Toodledo e-mail login address and your password and then click Save. Toodledo will immediately start to synchronize your tasks, and it does so quickly.

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. 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.

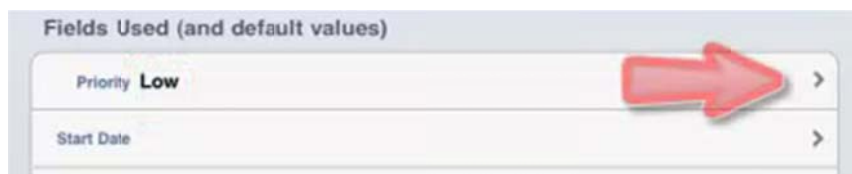


So, drag down the fields you do not want in that list. In this case we will drag Due Time down to the unused field section; do the same with Star and Folder (you may want to add Folder back in later once you start using that feature—use it like a Projects tag). Then drag start date up so it sits below priority. Here's how it should look; 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.



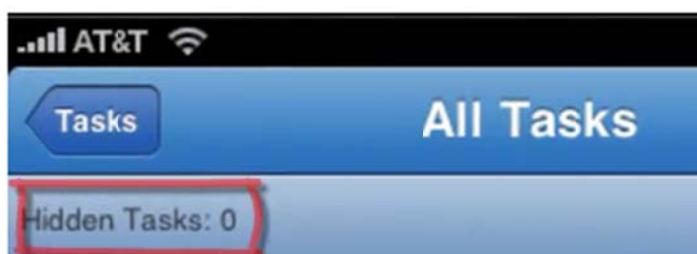
Do the same for start date, set it to today.

### Hiding future dated tasks and completed tasks

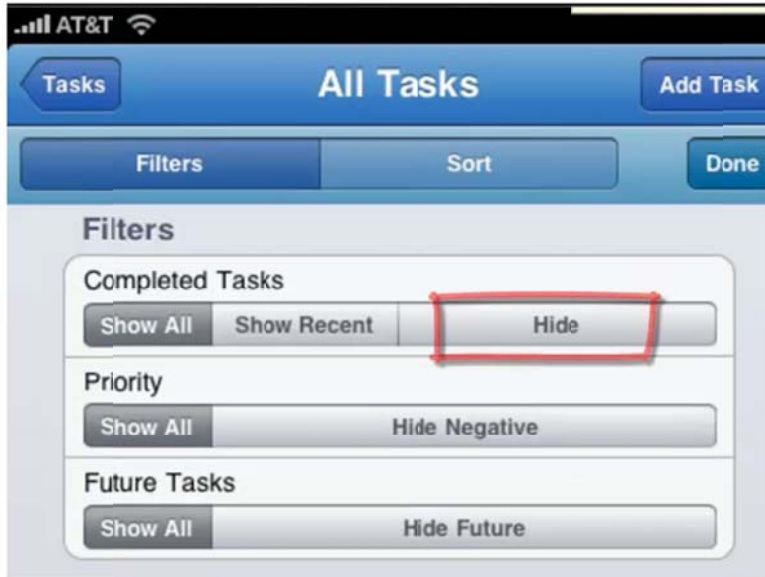
The way you set filtering is a little tricky. You don't do it in the settings window; rather you go to the tasks view. So let's do that now.

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.

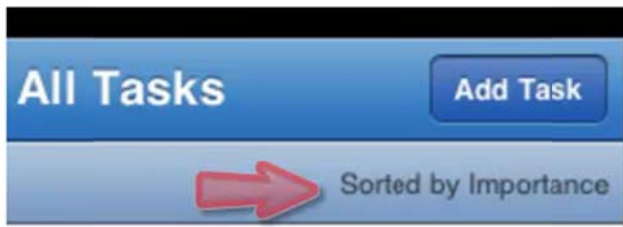


Once you see that, tap the Hide button in the Completed Tasks section, as shown above. Then tap the Hide Future in the Future Tasks section at the bottom.

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).



This “reverse” sorting (the down arrow) is the feature that, at the time of this writing, is absent from the web version, and is the reason we are using the All Tasks view in the iPhone/iPad versions, instead of the Priorities view. It’s a better view to use.

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!