

# **Using Toodledo** **to Store, Plan, Track and Accomplish Tasks and Projects**

## **General Concepts regarding using the Master Task System**

### **The difference between tasks, appointments, and projects**

- A task is single activity that may or may not have a due date on it.
- An appointment is an activity that has a date, a start time, an end time, an agenda,
- and a stated purpose.
- A project is a series of planned out deliverables and tasks with a due date and a goal.

### **Characteristics of the Information Transfer Form (ITF)**

The Information Transfer Form (ITF) is designed to keep track of random thoughts you have during meetings or when you are concentrating on completing a project. These random thoughts are unrelated to what you are working on at the moment. This allows you to keep track of them and not forget them.

- Print the ITF on both sides of the paper. Information written on blank sides of paper tends to get lost.

### **General guidelines for the Master Task Success System**

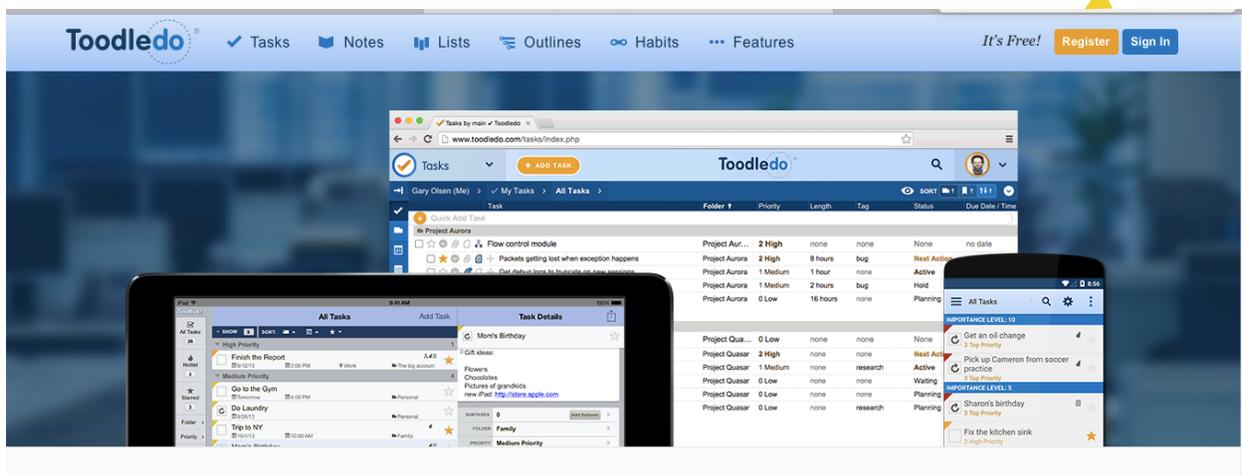
- The Information Transfer Form can be downloaded in paper format from the website [www.TotallyAccountable.com](http://www.TotallyAccountable.com)
- When printing the ITF form, print it on both sides of the paper. This cuts down on losing information on the blank back-side of paper.
- A copy of the Information Transfer Form should be brought to all meetings to keep track of all thoughts, unrelated to the meeting, that come to you during the meeting. These tasks get entered into the Information Transfer Form as soon as possible, unless completed.
- Tasks should be written down and should be entered into the Information Transfer Form as soon as you think of them.

- If there is a deadline date for the task to be done, that should be written with the task itself.
- Put any tasks delegated via an e-mail into the Information Transfer Form as soon as possible.
- Do not write on the back of a piece of paper that was not intended to be written on. The Information Transfer Form should be printed on both sides of the paper.
- Tasks should never be rewritten unless there is a good reason to do so.
- Tasks are not appointments. Tasks should never go on a calendar or in a calendar section. This eliminates having to move a task in a calendar if it was not completed.
- Create a recurring SPA appointment at the end of each business day.
- All employees, who have discretionary control over their time, should utilize this Master Task Success System.

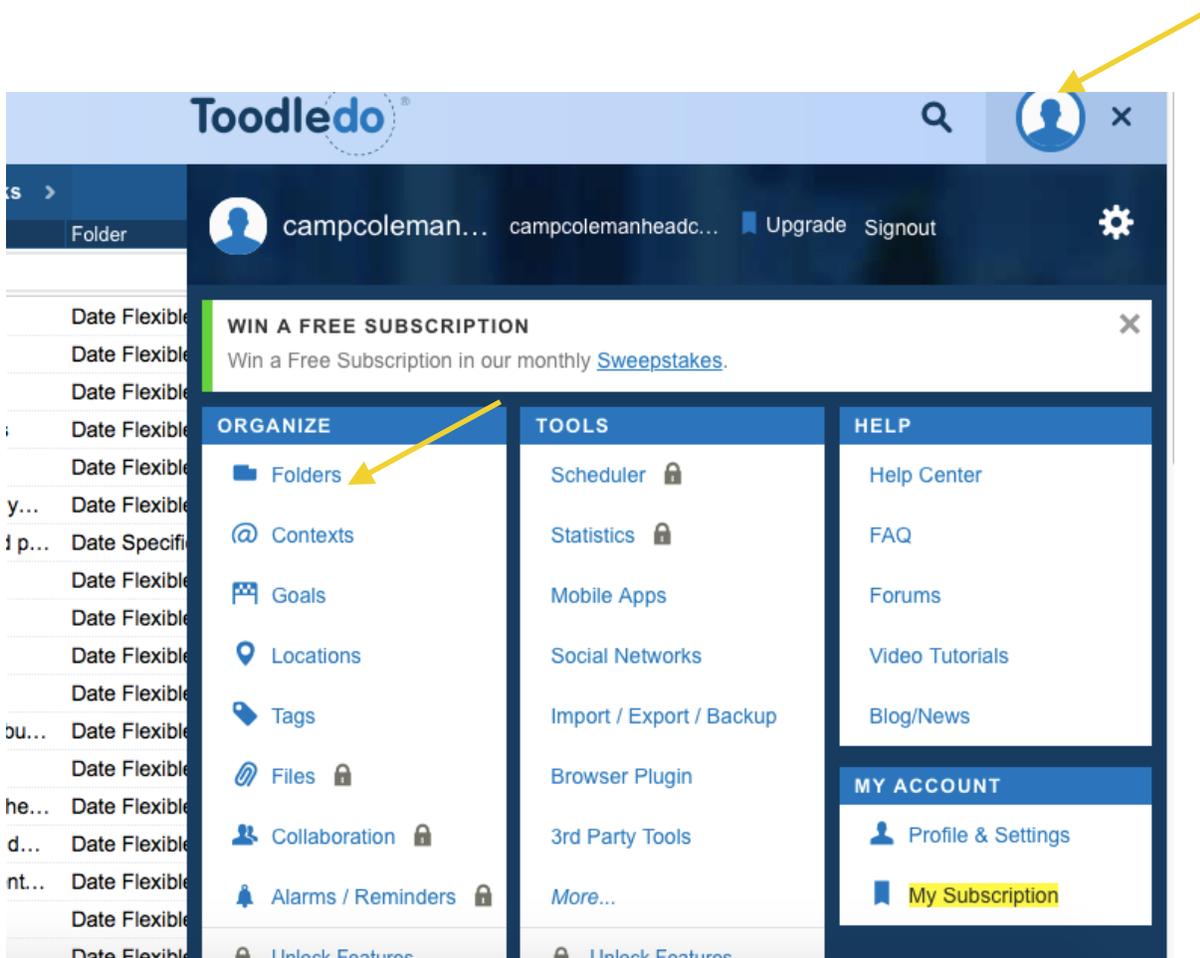
### **Guidelines for Writing Tasks Using Electronic devices**

During the day, when you are not working concentrated on a project or in a meeting where you would use the ITF, enter tasks and projects into your smart phone immediately

1. Go to [toodledo.com](http://toodledo.com) and create a free account. You may also choose to download the app to your phone.

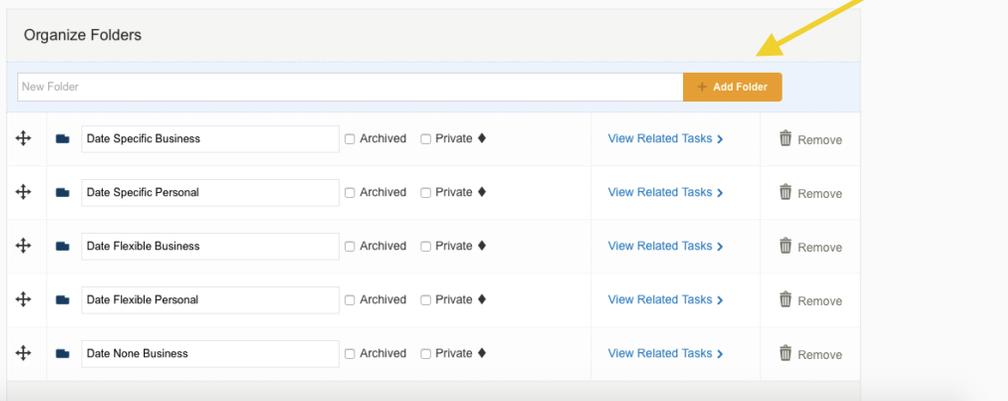


## 2. Create Folders for the 6 Core Categories



Folders are a convenient way to organize your to-do list. You can use folders to keep track of different projects, or keep work-related tasks separate from personal items. If you archive a folder, and it contains no active tasks, then it will be hidden from view. [More Info...](#)

If you are using our [collaboration tools](#), the 'private' checkbox will hide those tasks when collaborators view your workspace.



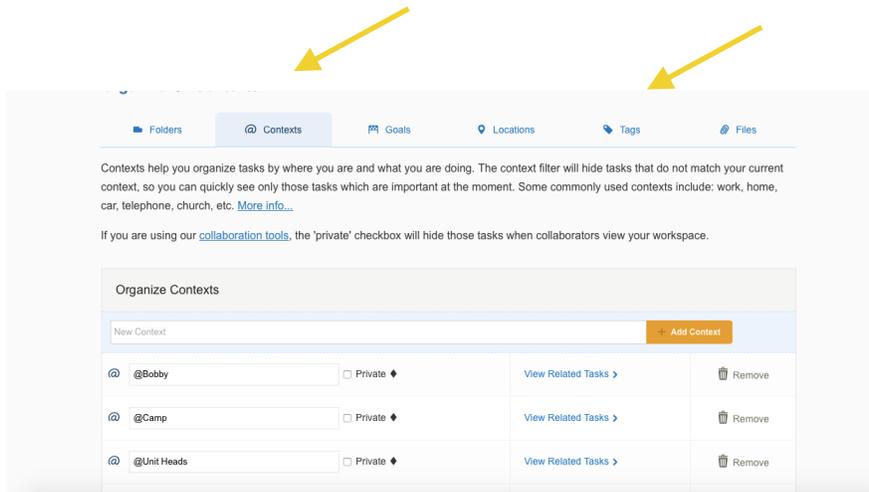
Place your tasks in the order in which you want to see them,

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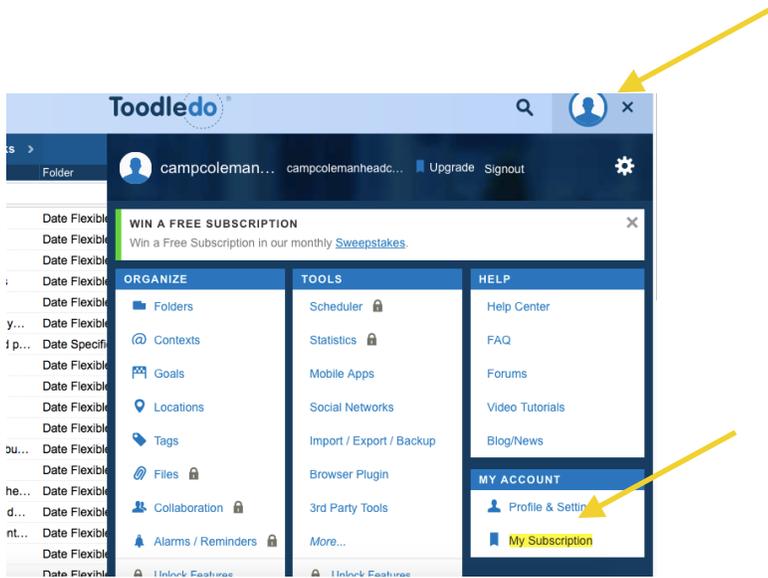
Date Specific Business  
Date Specific Personal  
Date Flexible Business  
Date Flexible Personal  
Date None Business  
Date None Personal

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**3. On the same page, click the tab for context or tags. Create any additional contexts you want to use as subfolders. You can also just use tags as subfolders**

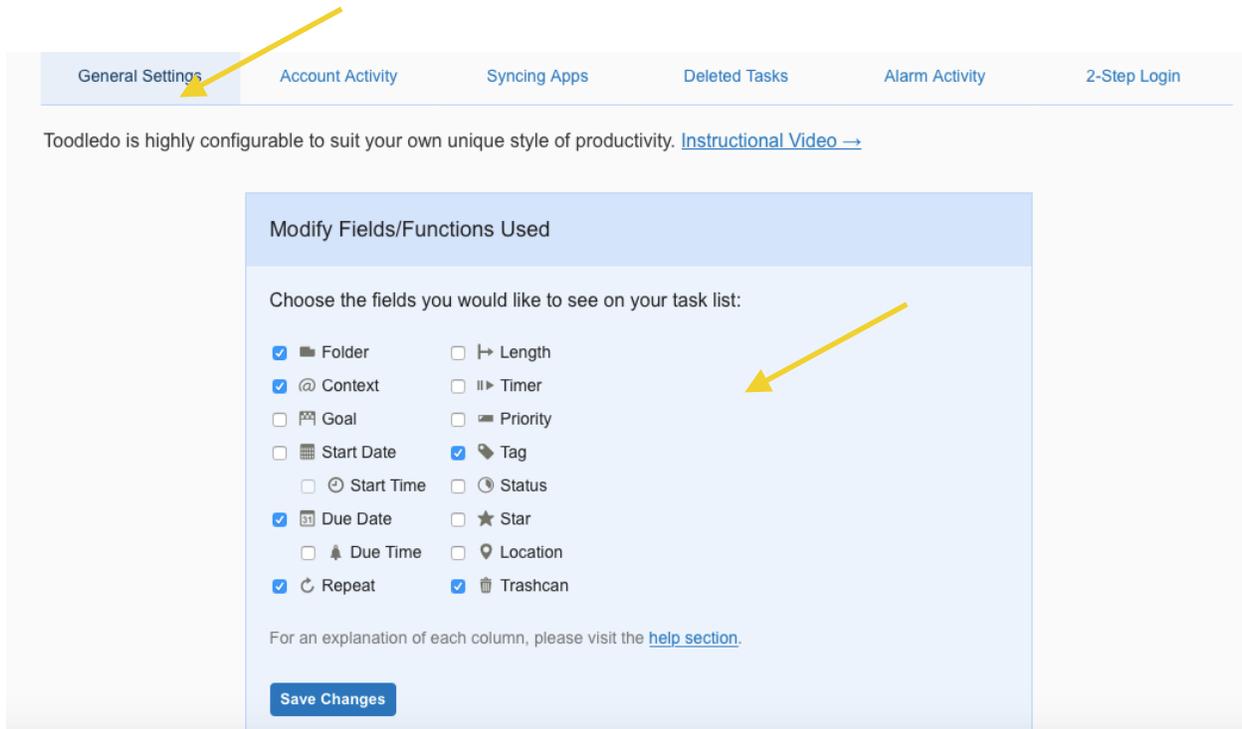


4. To be able to add tags, go to your account settings , and under my account, click profile. Then Go to General Settings, the scroll down to the Tasks section and click Fields and add tags to your fields.



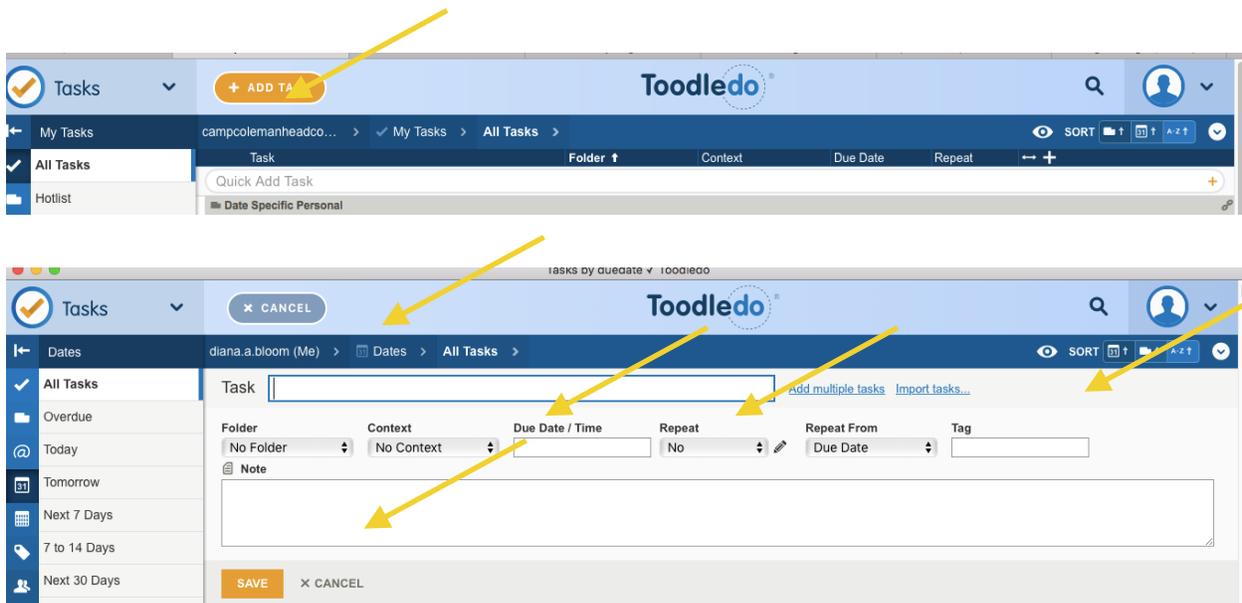
Tasks		
Display Preferences:	Grid (One line with columns) Tags are sorted by popularity.	<a href="#">edit</a>
Behavior Preferences:	Default.	<a href="#">edit</a>
Fields/Functions Used:	Folder, Context, Due Date, Due Time, Repeat, Tag, Trashcan	<a href="#">edit</a>
Row Style:	Title is unstyled Completed tasks are dimmed	<a href="#">edit</a>
Default Views:	Tasks: Due-date. Notebooks: Main.	<a href="#">edit</a>
New Task Defaults:		<a href="#">edit</a>
Subtasks:	Subtasks are a <a href="#">Subscription Feature</a> .	<a href="#">Subscribe</a>

Here are the recommend the fields to keep things clean and simple.

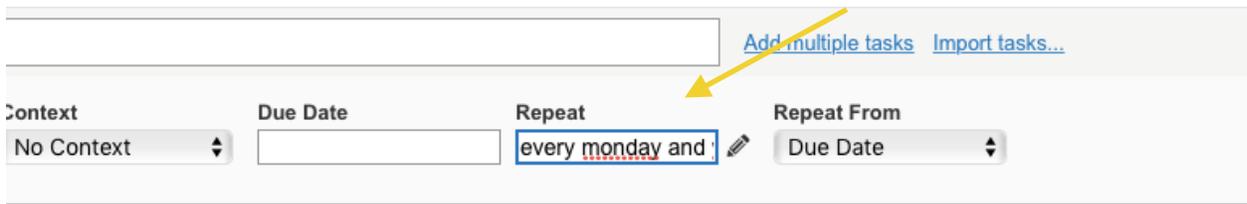
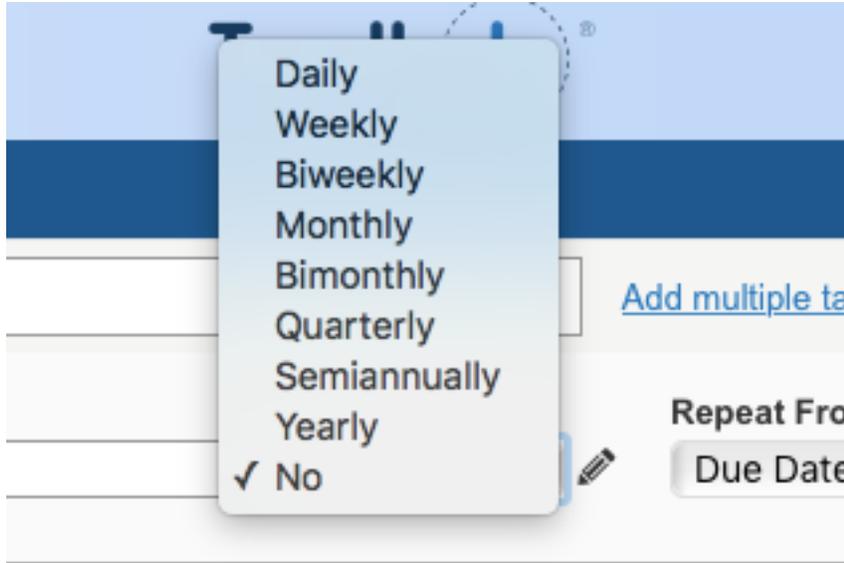


## Folder, Context, Due Date, Repeat, Tag, and Trashcan

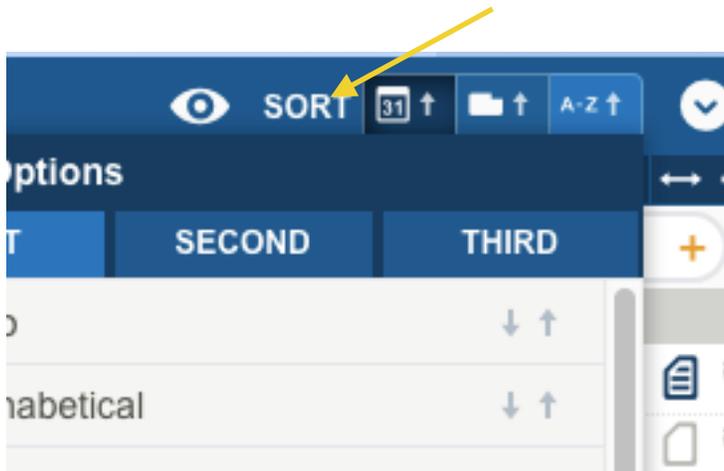
### 5. Add tasks



Assign a due date, a folder, context and/or tags and recurrence if needed.  
Only add alarms to Date Specific Tasks



6. Sort your tasks, first by due date, then by folder, then A-Z



## **For the A-Z sort to have the most impact:**

Write all tasks beginning with a verb: These verbs can group tasks of a like nature together, for more efficiency. The verbs help you to remember the action you were going to take. Suggested verbs are:

### **Call**

Use this verb when you plan to call someone and it is not an appointment. Be sure to include 1) the name of the person, 2) the phone number, even if you know it, and 3) the subject.

### **Get**

Use this verb to group tasks that are not Calls, Gos, emails, or Sends. Use “Get the Jones report prepared” rather than “Prepare the Jones report.” Use “Get working on the building project” rather than “Work on building project,” or “Finish the building project.”

### **Go**

Use this verb when you are physically going somewhere. This way you can view all of your tasks that need to be done, when you are going somewhere, to see if there are any other Go tasks you can accomplish at the same time.

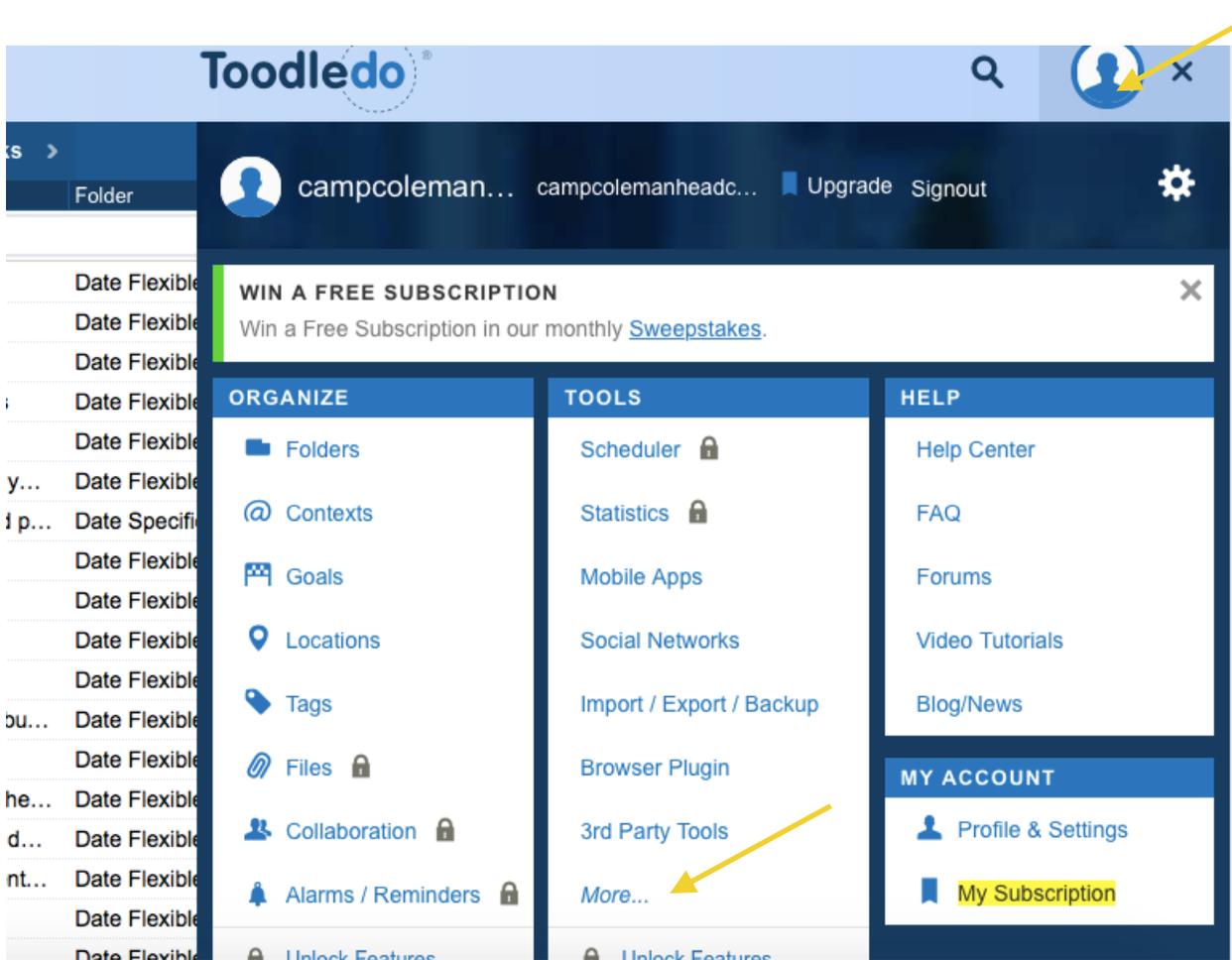
### **Send**

Use this verb when you have something to physically send to someone.

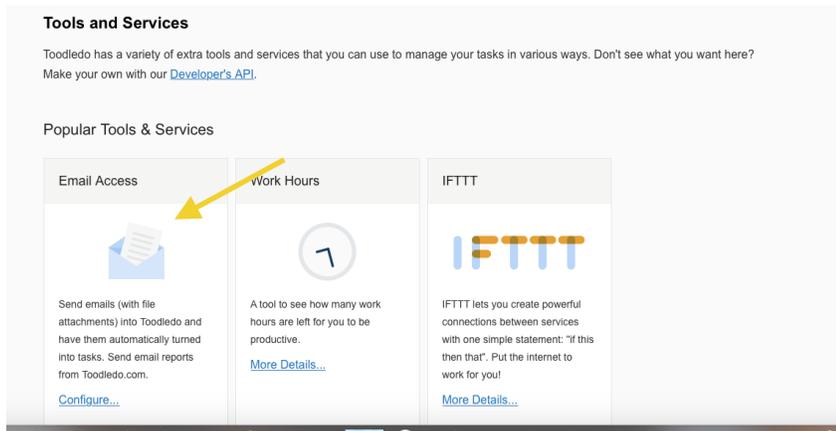
### **Email**

Use this verb for tasks to send emails

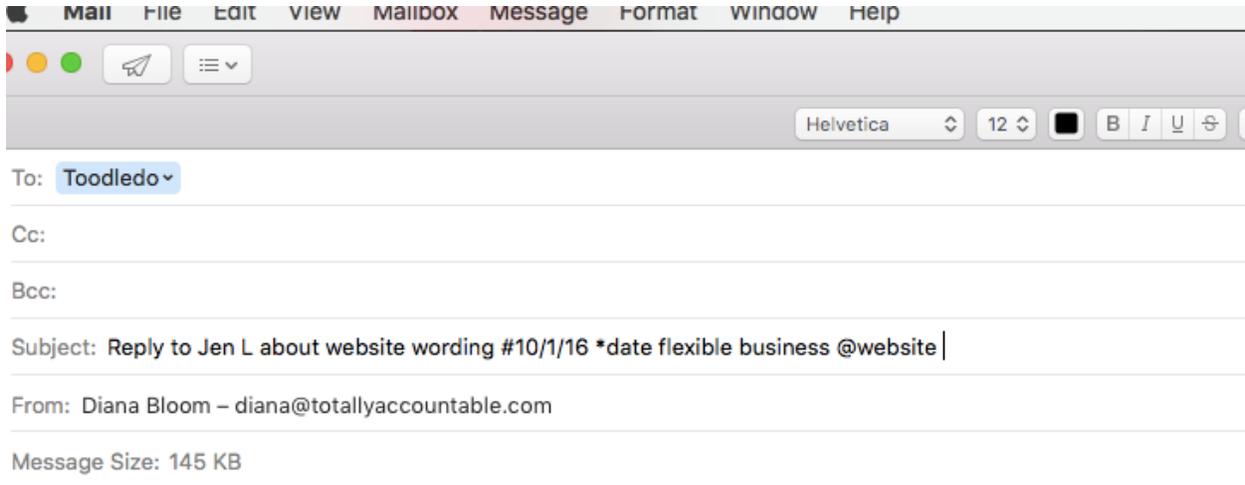
7. Get an email address associated with toodledo so you can forward emails as tasks



Click the account/ Avatar and then go to Tools-More



You will find all of the necessary keyboard shortcuts to forward your mail so that it is filed appropriately in your folders.



8. Add a toodledo widget to your google calendar if you want to from Settings, Tools, Third party apps.

