PhonePad To Do List User Guide

For PhonePad 5



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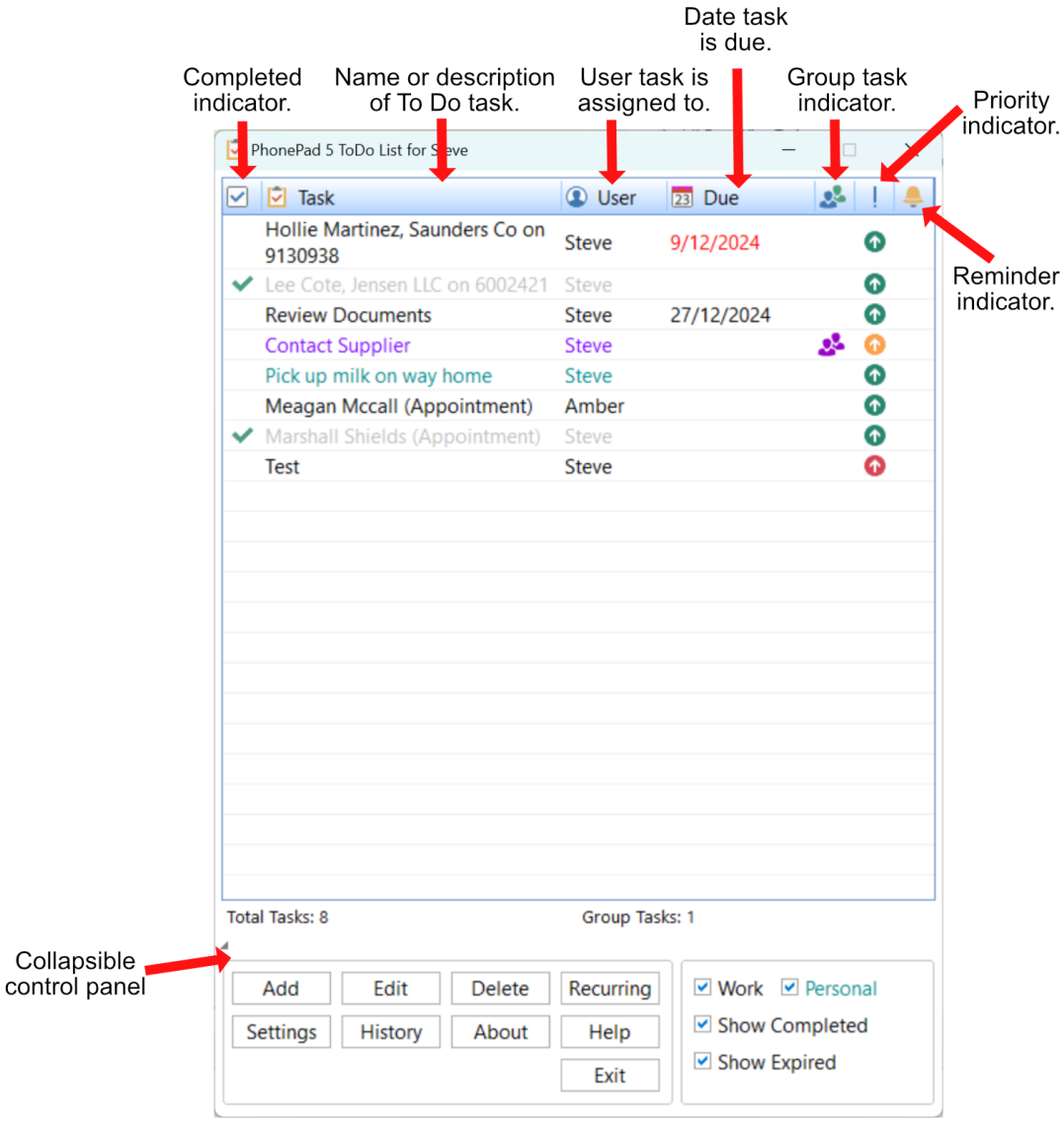
Getting started

Use the PhonePad To Do List add-on to track work and personal tasks, set reminders, and turn PhonePad messages into tasks you can follow up.

Open the To Do List

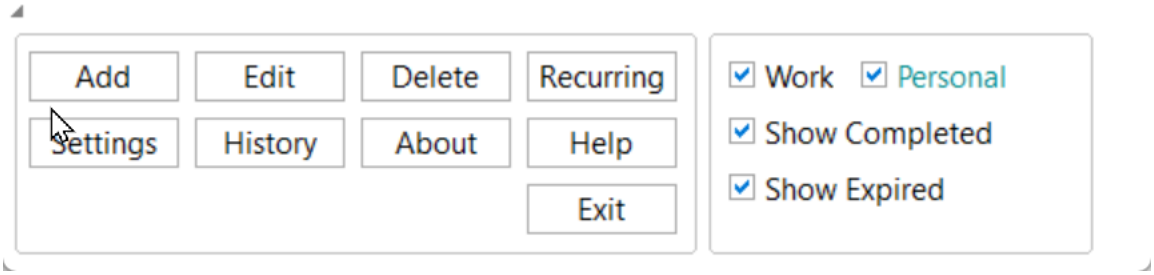
In PhonePad, open the **Follow Up** tab and click **To Do List**, or choose **Tools → To Do List**.



The task list shows completion, task name, assigned user, due date, group status, priority and reminder.

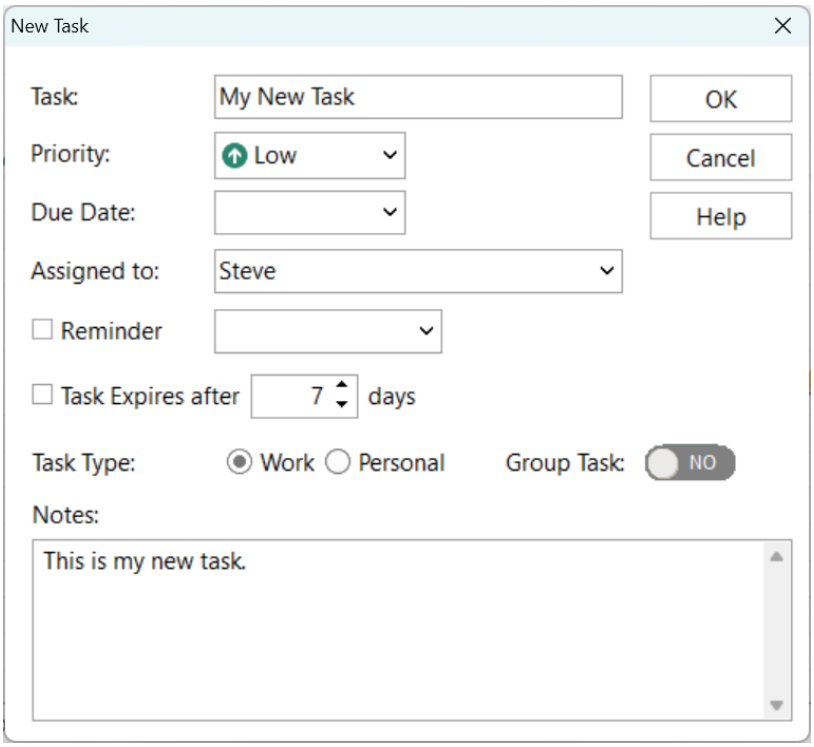
Find your way around

Click the small triangular button to open or close the control pane. Use **Work** and **Personal** to filter by task type. Use **Show Completed** and **Show Expired** to include those tasks in the list.



Create a task

1. Click **Add**, or right-click the task list and select **Add ToDo Task**.
2. Enter a **Task** name or description. Set the options you need, then click **OK**.



The new task window.

Option	What it does
Priority	Choose Low, Medium or High.
Due Date	Set an optional due date. Overdue dates appear in red.
Assigned to	New tasks are assigned to you by default. You can assign a task to another user if you have access to their list.
Reminder	Set an optional reminder for a specified time.
Task Expires After	Enable expiration and enter the number of days.
Task Type	Choose Work or Personal.
Group Task	Use Yes to allow people with access to your list to work on a shared work task.
Notes	Add details. People with access to a group task can also see its notes.

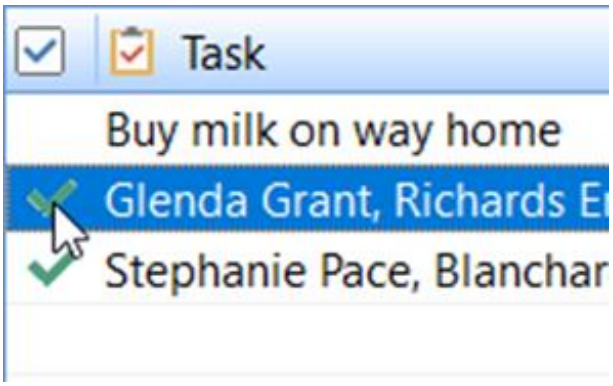
Manage tasks

Edit or delete a task

Select a task and click **Edit** or **Delete**. You can also right-click it and choose **Edit ToDo Task** or **Delete ToDo Task**. Double-click a task to edit it.

Mark a task as complete

Click the first column of the task. If a PhonePad message is linked, marking either the task or the message complete also completes the other.



Click the first column of the task to mark it complete.

Use the task list menu

Right-click the list to access task commands and the following options.

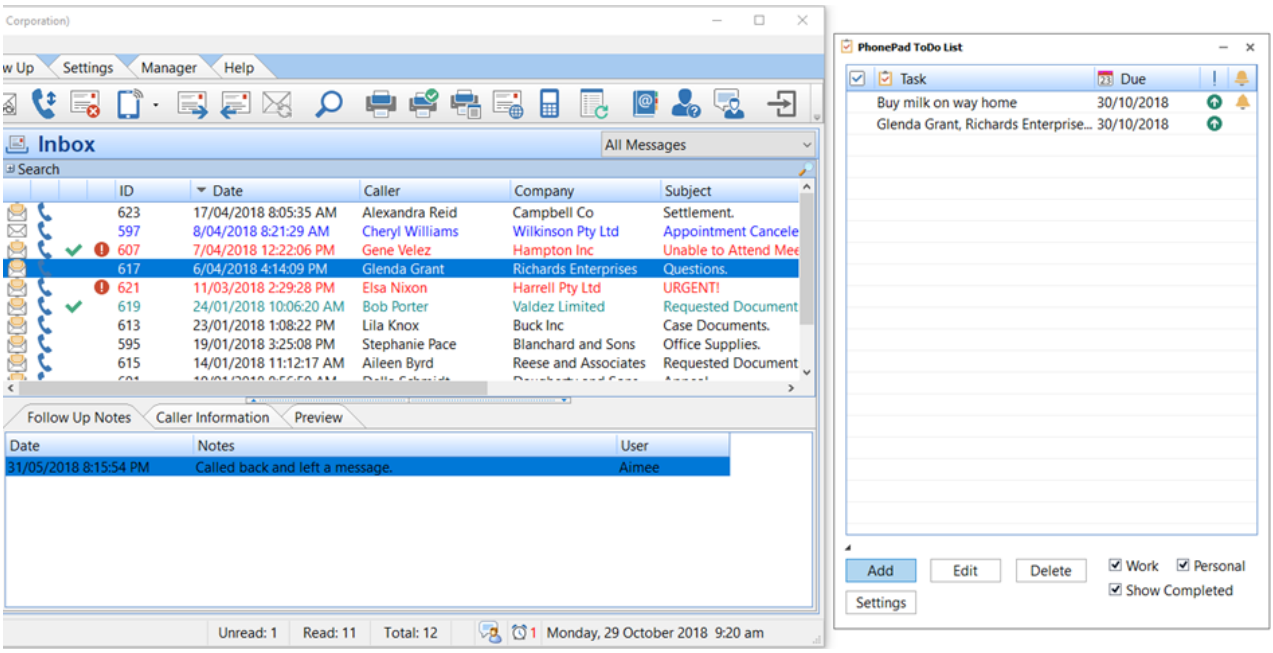
Command	Action
Add ToDo Task	Create a new task.
Open Message	Open the PhonePad message linked to the selected task.
Print ToDo List	Print a copy of the list.
Unselect All	Clear the current task selection.
Refresh ToDo List	Refresh the list immediately. The list also refreshes automatically.

Work with linked messages

Create a task from a PhonePad message

You can drag a phone message or text message from PhonePad into the To Do List.

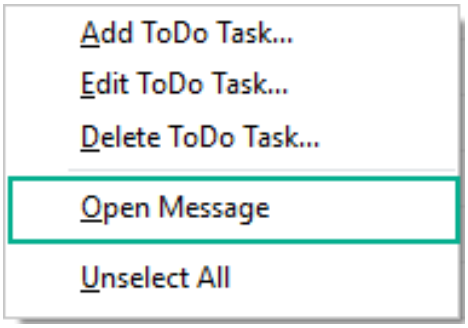
1. In PhonePad, right-click and hold the message you want to follow up.
2. Hold down **Alt** and drag the message to the task list while keeping the **right mouse button** pressed.
3. Release the right mouse button over the task list. To Do List adds a task linked to the message.



A PhonePad message added to the To Do List.

Open the original message

Right-click the linked task and select **Open Message**. PhonePad opens the associated message.



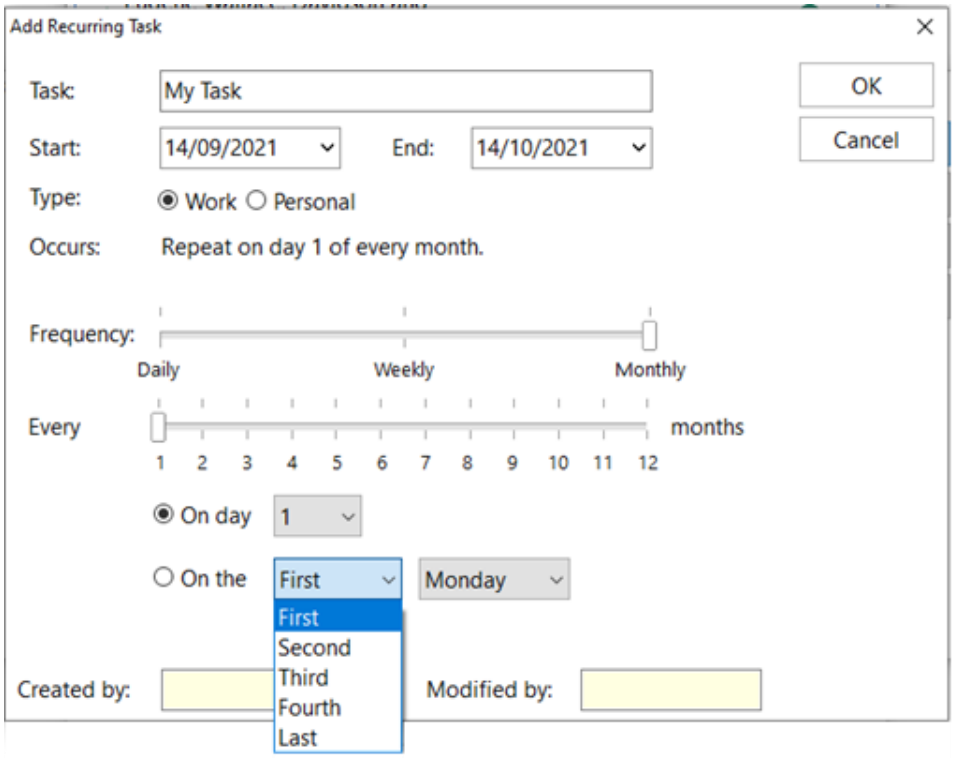
The Open Message command on the task list menu.

Schedule recurring tasks

Click **Recurring** in the control pane, then click **Add** to create a repeating task. Enter a task name, choose the start and end dates, and select Work or Personal. Use the **Frequency** slider to choose Daily, Weekly or Monthly.

Frequency	How to set it
Daily	Set the number of days between tasks.
Weekly	Set the weekly interval and choose the day or days of the week.
Monthly	Set the number of months between tasks. Choose a numbered day or an occurrence of a weekday, such as the first Monday.

Check the **Occurs** summary, then click **OK**.



The monthly options let you choose a date or a weekday pattern.

Change or remove a recurring task

In **Recurring**, select a task and click **Edit**, or double-click it. To remove a recurring task, select it, click **Delete**, and confirm.

Set reminders and preferences

Set a task reminder

When adding or editing a task, turn on **Reminder** and set when it should appear. The reminder slides in from the right side of the desktop. Click **X** to close it, or use the auto-close setting.

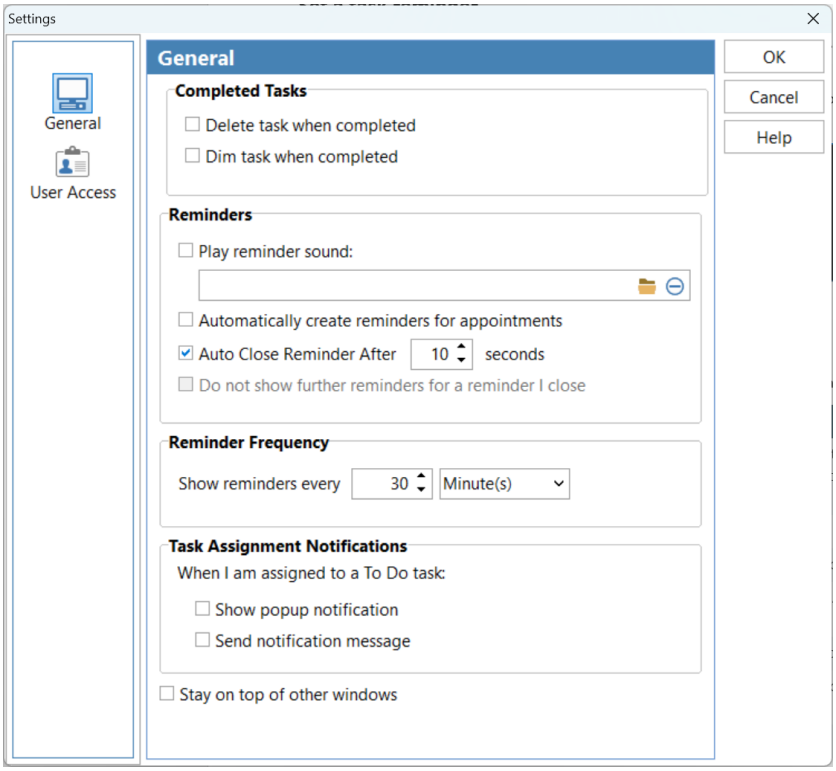
Reminders can reappear until you complete the task or remove the reminder. You can also tell To Do List to stop showing a reminder after you close it.



A task reminder as it appears on the desktop.

Change general settings

Click **Settings** in the control pane. **General** opens by default. Click **OK** to save changes.



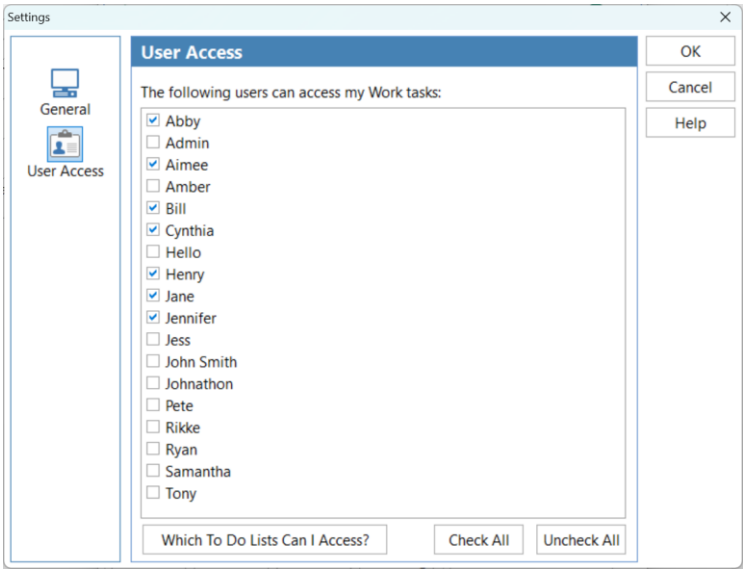
Setting	What it does
Delete Task When Completed	Removes completed tasks from the list. If you complete a linked message in PhonePad, the task is removed and the message stays in PhonePad.
Dim Task When Completed	Displays completed tasks in light grey.
Play Reminder Sound	Plays the sound chosen in Reminder Sound. Select a WAV file.
Automatically Create Reminders for Appointments	Creates a reminder when you drag an Appointment Calendar appointment to the To Do List.
Auto Close Reminder After x Seconds	Closes the reminder after the specified number of seconds.
Do Not Show Further Reminders for a Reminder I Close	Stops showing a reminder after you close it.
Show Reminders Every x Minutes	Sets how often reminders reappear.
Stay on Top of Other Windows	Keeps To Do List above other windows where possible. Other apps with the same setting may appear above it.

Share tasks and review history

Give someone access to your list

Open **Settings → User Access** and tick the box next to each person who needs access. Sharing applies to **Work** tasks. Personal tasks are private.

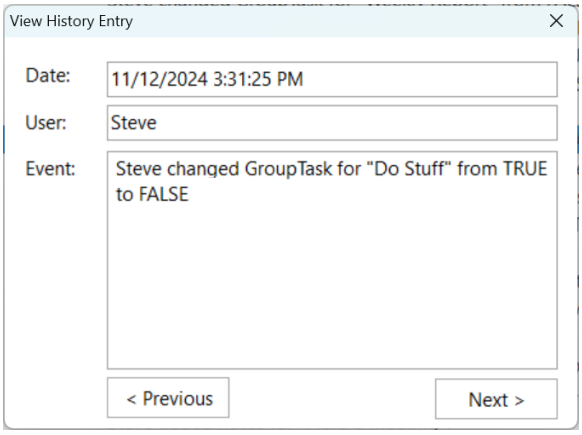
Click **Which To Do Lists Can I Access?** to see the lists available to you. To get access to someone else's list, ask that person, a Manager or a System Administrator.



User Access settings show who can access your work tasks.

Review changes to work tasks

Click **History** in the control pane to see when work tasks were created, edited or deleted. To open an entry, select it and click **View**, or double-click it. Personal tasks and settings changes are excluded from history.



The details for an individual history entry.