

# Tagalot Contacts

## User Guide Version 3

Select a link to navigate to the page.  
Select a page title (link) to return to this page.

### Contents

Groups View & Persons & Tags View

Organisation Groups

Person and Tags List

Short Form Entry - Person entry

Short Form Entry - Person + organisation

Collection Groups

Service Groups

Contact Hub

Email Distribution

Organisation Chart

Search Guide

Tag Person to an Organisation

Add Tag to Collection or Service Group

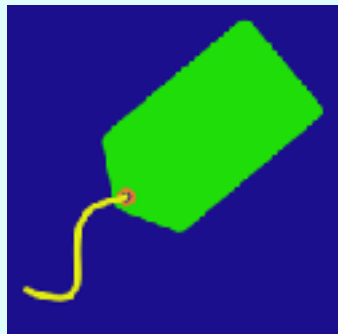
Add Organisation to Collection or Service Group

More Options

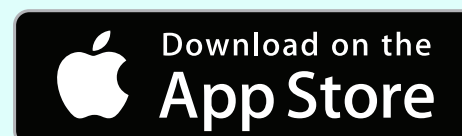
Import

Export

Settings



Tagalot Contacts



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### Groups view

Displays organisation groups, collection groups, service groups or organisation addresses.



Organisations group persons as 'tags'. Use for legal entities, families, clubs, events and reference-only entries.



Collections group persons, tags and organisations. Use for any logical grouping requirement.



Services group persons, organisation tags and organisations as service tags, which contain user-defined links to external sources, such as social media sites.

## Groups View and Persons & Tags View

View shows a split-view in landscape orientation, available on all supported devices. These are separate views in portrait orientation on all supported devices.

### Persons & Tags view

Displays persons, tags, and personal addresses.



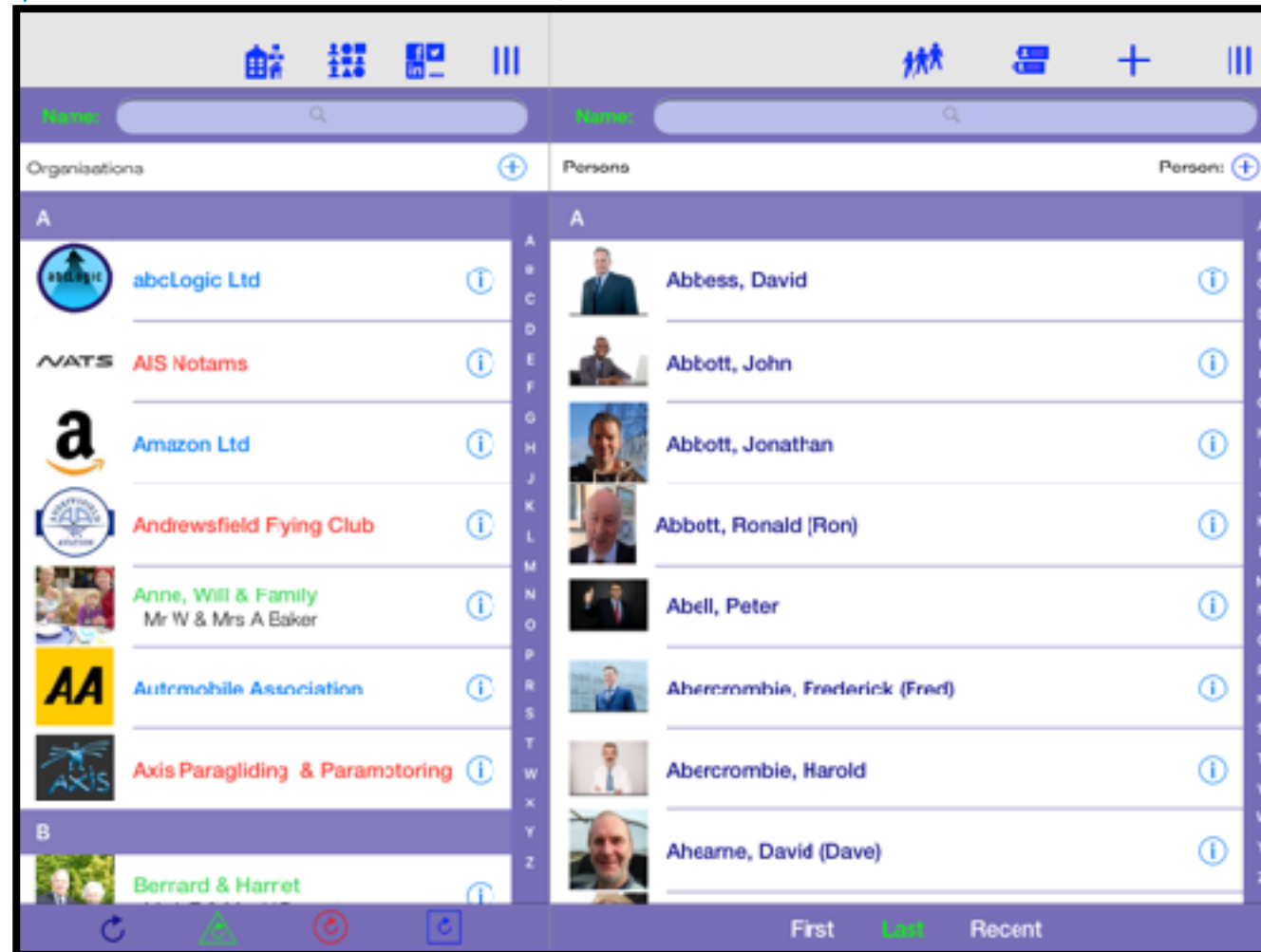
Lists Person rows, to access all details and associations for a person.



Lists Tag rows, to access tags, which contain details for the person at an organisation.



Short Form Entry  
Opens the view enabling fast entry of the main details for a person, and optionally an organisation and address.



Use 'drag & drop' actions on the split-view layout to add -

- a person contact to an organisation and create an organisation tag (or just 'tag')
- a person, tag or organisation contact to a collection (adds a 'link' to the contact)
- a person, tag or organisation contact to a service and create a service tag.

See Tagging Guides for 'drag & drop' actions.



Accesses more options - for further details see guides for each view.  
Horizontal lines - local storage in use, vertical lines indicate iCloud storage in use.

Tap to view Organisation groups.

## Organisation Groups

Tap for more actions, or switch to Persons and Tags view on iPhones. 'More' icon with vertical lines indicates iCloud storage in use.

Tap to select a search option. See [Search Guide](#) for details.

### Organisations List

Context is indicated by the name colour: blue for business, red for social, green for family.

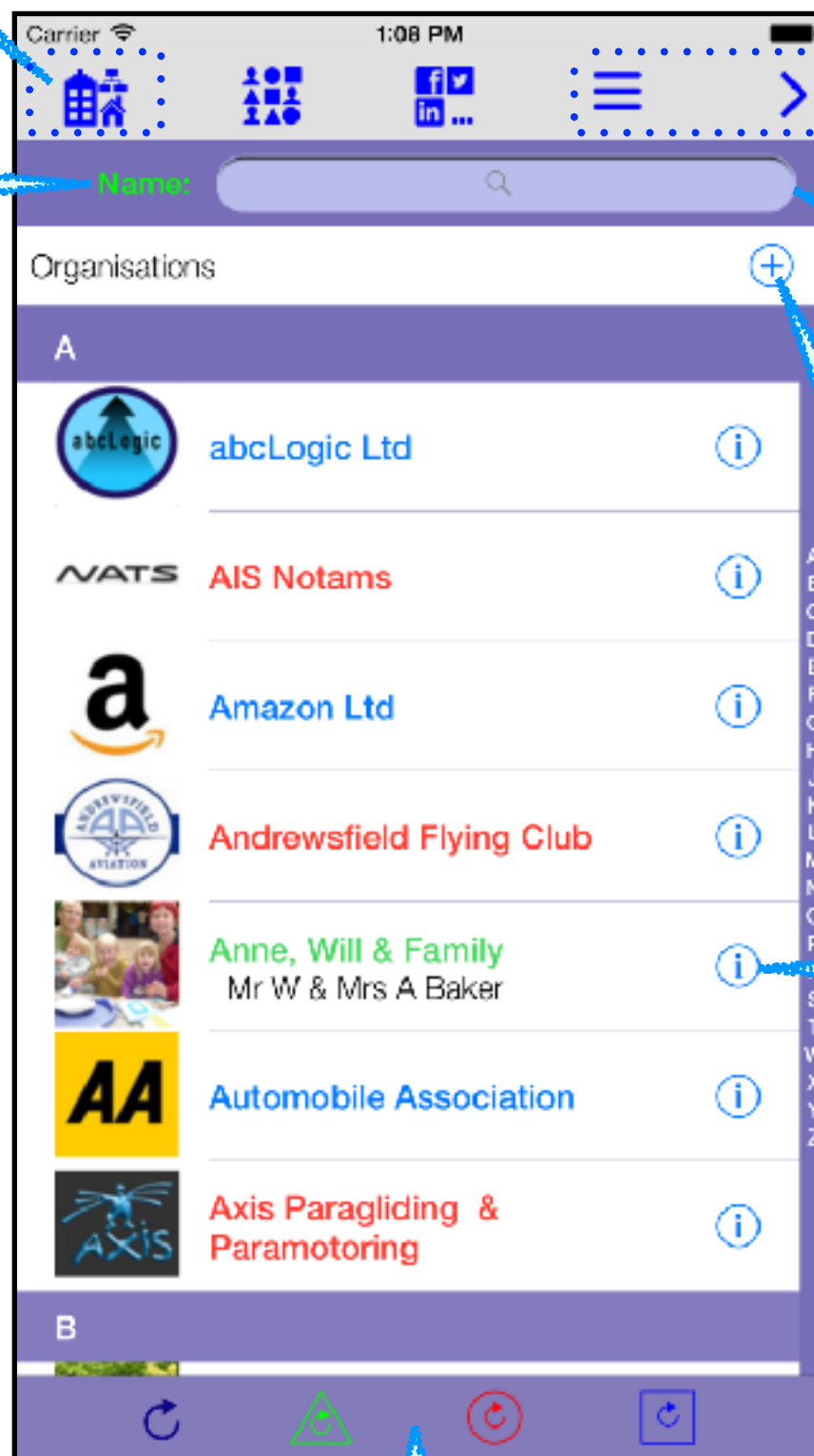
Swipe right on a row to display the grouped tags in the [Persons & Tags](#) view.

Tap a row to open the [Contact Hub](#) view for the organisation.

Swipe left on a row to delete the organisation, addresses and tags (but not person details).

Tap a row, hold, release (with no drag) to edit an organisation's details.

See [Tagging Guides](#) for 'drag & drop' actions.



Enter search text. See [Search Guide](#) for details.

Add new organisation, and select business, social or family context

Tap (i) for the Address List view, which lists the organisation and addresses. Edit the organisation, or add and edit addresses.

Index bar: slide up/down (turns red) to find required entry

### Context filters

All, Family, Social, Business



Tap to view Group List.  
(not required on iPad)

## Persons & Tags view

Main options to list persons, list organisation tags, access short form entry or more options. The 'More' icon with vertical lines indicates iCloud storage in use.

Tap to select a search option. See Search Guide for details.

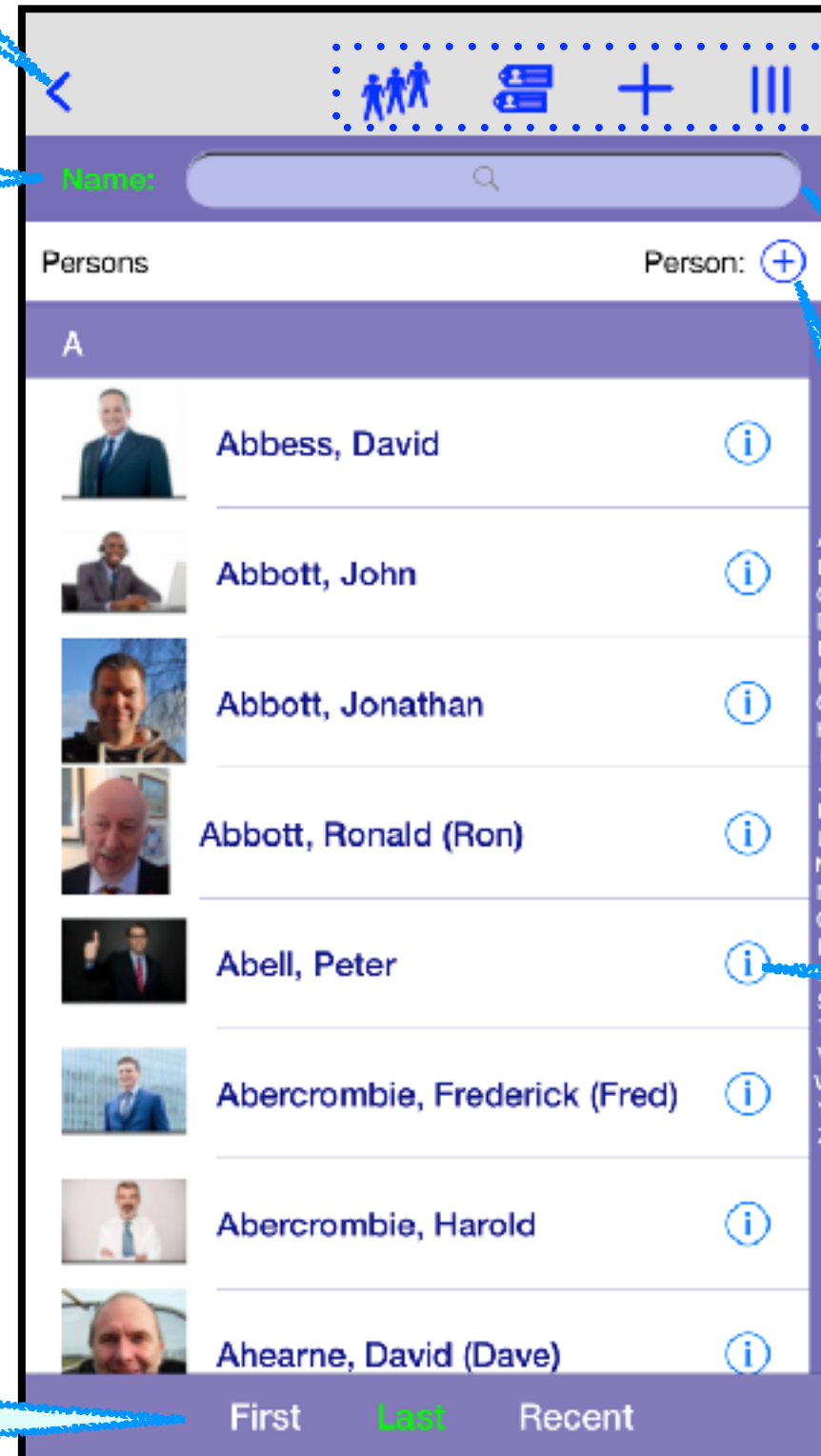
### Persons List Actions

Tap a row to open the Contact Hub view for the person.

Swipe left to delete the person and all associated tags.

Tap a row, hold, release (with no drag) to edit a person's details -  
See Tagging Guides for 'drag & drop' actions.

List by first name, last name, or most recent change (new or saved).



Enter search text.  
See Search Guide for details.

Add new person details with main entry form, optional single workplace details and personal addresses.

Tap (i) for the Person Detail & Tags List, to edit/view personal details and all associations for the person.

Slide the index bar up/down (turns red) to show the required entry.







## Short Form Entry

### 1. Person details only view (iPad Pro view shown)

The short form entry view provides a simple option to capture main details easily. Use the standard entry views to add more details. Opens with the person-only context, select other contexts from the top row. The view remains open after 'Save' for further entries; look for the 'Repeat' keyboard option, e.g., on Last Name.

Select entry context:-

-  person-only
-  person + family
-  person + social
-  person + business

#### Personal workplace details.

Use these details for the person where no separate organisation group is required, e.g., no other contacts at the organisation. Note that workplace names are currently not included in searches; set up an organisation if required.



The screenshot shows the 'Short form entry' app interface. At the top, there's a 'Cancel' button on the left and a 'Save' button on the right. Below the title bar, there's a row of four context icons: a person (selected), a person with a family tree, a person with a social network, and a person with a business. The main content area is divided into several sections: 'Person details' (with fields for First Name, Last Name, Person - Email, Salutation, Person - Telephone 1, and Person - Telephone 2), 'Person's workplace' (with a field for Workplace name), 'Workplace details' (with fields for Workplace role or job title, Workplace email, and Workplace telephone), and 'Personal address details' (with fields for First part of address, up to 5 lines, Post Town, County, Postcode, and Country). Each section has a camera icon to its right for taking a photo. At the bottom, there are 'back', 'hide', and 'next' buttons.

Take person's photo or load an image.

#### Personal details.

First name, last name and email address will be checked for a duplicate entry. Text is red if a match. 'Save' permitted only on a new entry using this view. Grey boxes for phone descriptions and leading '00' on telephone numbers get converted to '+'. Take a location photo or load an image for the address.

Take a location photo or load an image for the address.

#### Personal address details.





Same format as organisation addresses, with up to five lines in the first local part of the address and entries for the main or post town, county, ZIP or post code and country. Additional addresses and other details such as GPS coordinates are entered through the main entry views.

## Short Form Entry

### 2. Person & Organisation view (Business context & iPad Pro view shown)

The short form entry view to add a person and organisation details. Select an entry context from the bottom bar. The view remains after 'Save' for further entries and a 'repeat' key is available for a person's last name and organisation name.

Select entry context:-

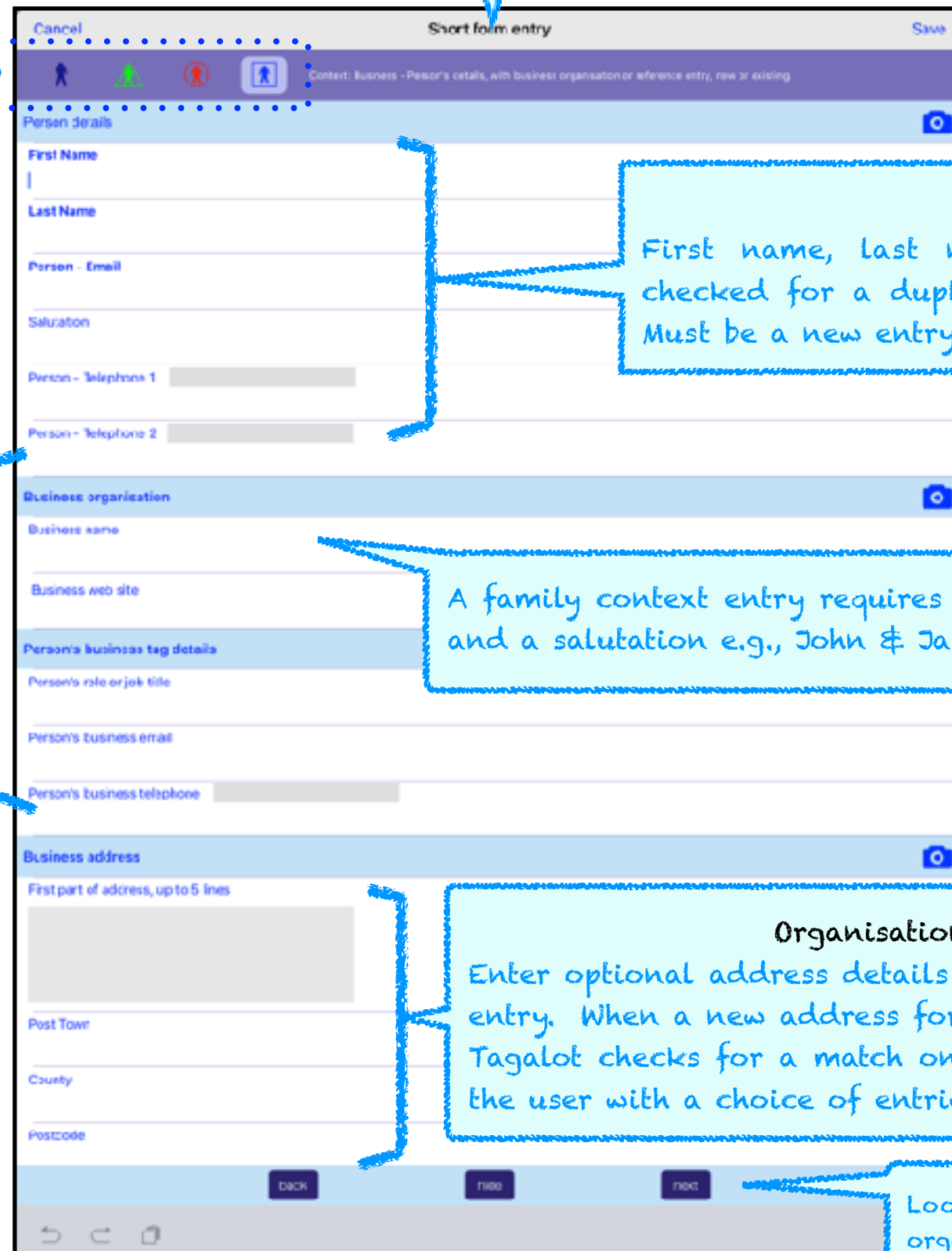
-  person-only
-  person + family
-  person + social
-  person + business

#### Organisation & tag details.

Enter a new or previously entered organisation name. A matched name will be shown in red and the new person and any tag details will be added to the existing organisation.

A family context entry also includes a salutation field after the family legal name.

Tag entries contain details for the person at the organisation; only the person's role in a family context entry.



Take person's photo or load an image.

#### Personal details.

First name, last name and email address will be checked for a duplicate entry. Text is red if a match. Must be a new entry when using the short form view.

Take a photo or load an organisation logo or image.

A family context entry requires a legal name, e.g., Mr & Mrs J Smith and a salutation e.g., John & Jane (not shown on this business view).

Take a location photo or load an image for the address.

#### Organisation address details.

Enter optional address details for the new or existing organisation entry. When a new address for an existing organisation is entered, Tagalot checks for a match on first part and post town, providing the user with a choice of entries if matched.

Look for 'repeat' key on Last Name and organisation name if entering similar details.

Tap to view Collection groups.

## Collection Groups

A contact is placed into a collection group by a drag & drop action, creating a link to the contact - i.e., no tag details. See Drag & Drop guide for details.

### Collections List

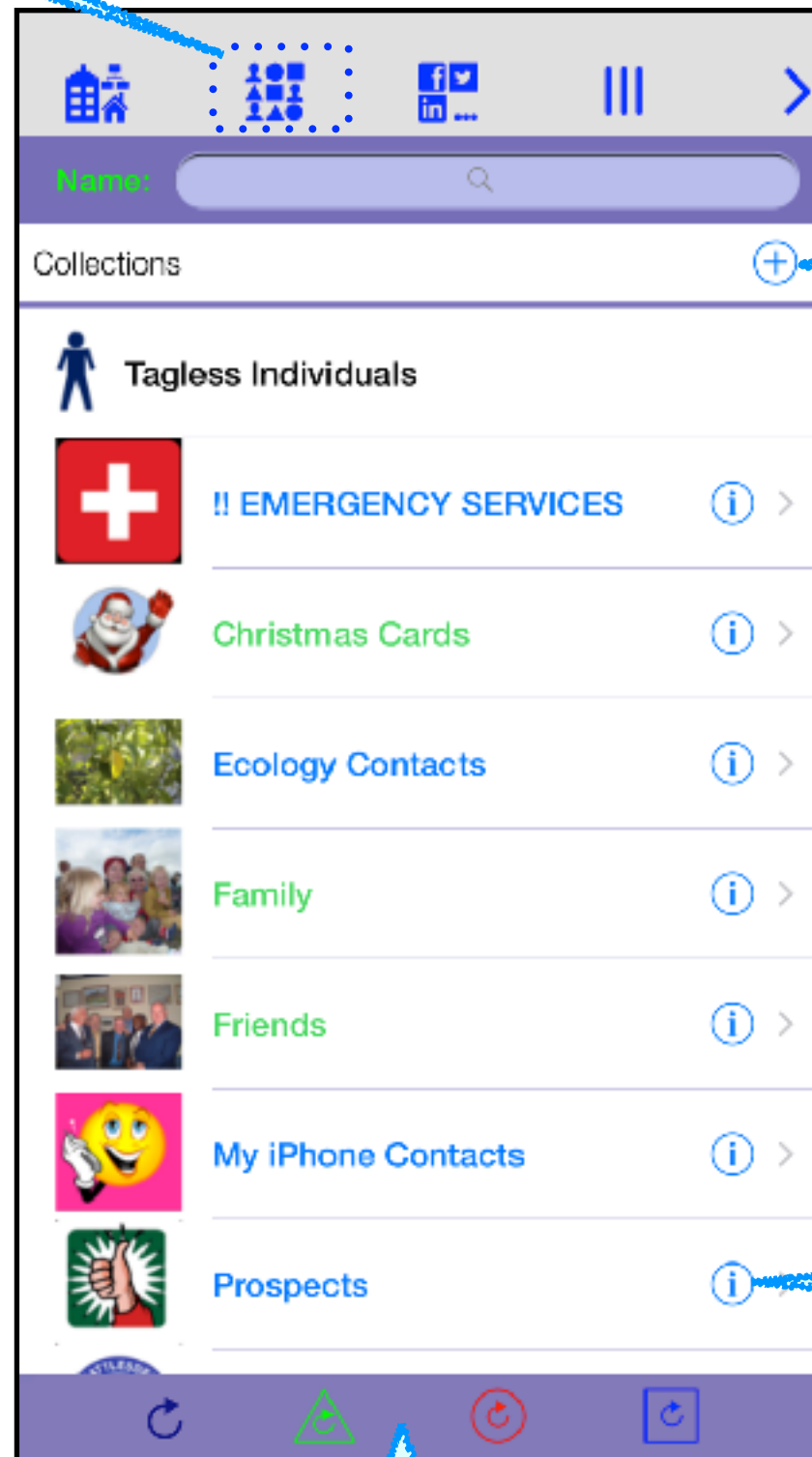
Collection groups hold links to members of the group (not tags)

Tap (i) to edit the collection group name, keywords, notes or to change the context.

Swipe right on a row to display the linked members in the Persons & Tags view.

Tap a row to open the Contact Hub view for the collection.

Swipe left on a row to delete



Collections are used for any purpose, wherever a logical grouping of Tagalot contacts is required. Each group can hold a mix of contact types, including persons, organisations, and tags.

Add a collection group.

Details include name, image, key words, notes and context settings.

Collection groups (and organisation groups) can be selected for export actions, group emails, labels and messaging actions for each grouped contact through the Contact Hub.

An example is the 'My iPhone Contacts' collection, keeping just your primary contacts in the group, which can be exported as a group to Apple Contacts.

Open a collection group entry to edit the group details.

Context filters:  
All, Family, Social, Business



Tap to view Service groups.

A contact is placed into a service group by a drag & drop action, creating a service tag which can be edited.

See Drag & Drop guide for details

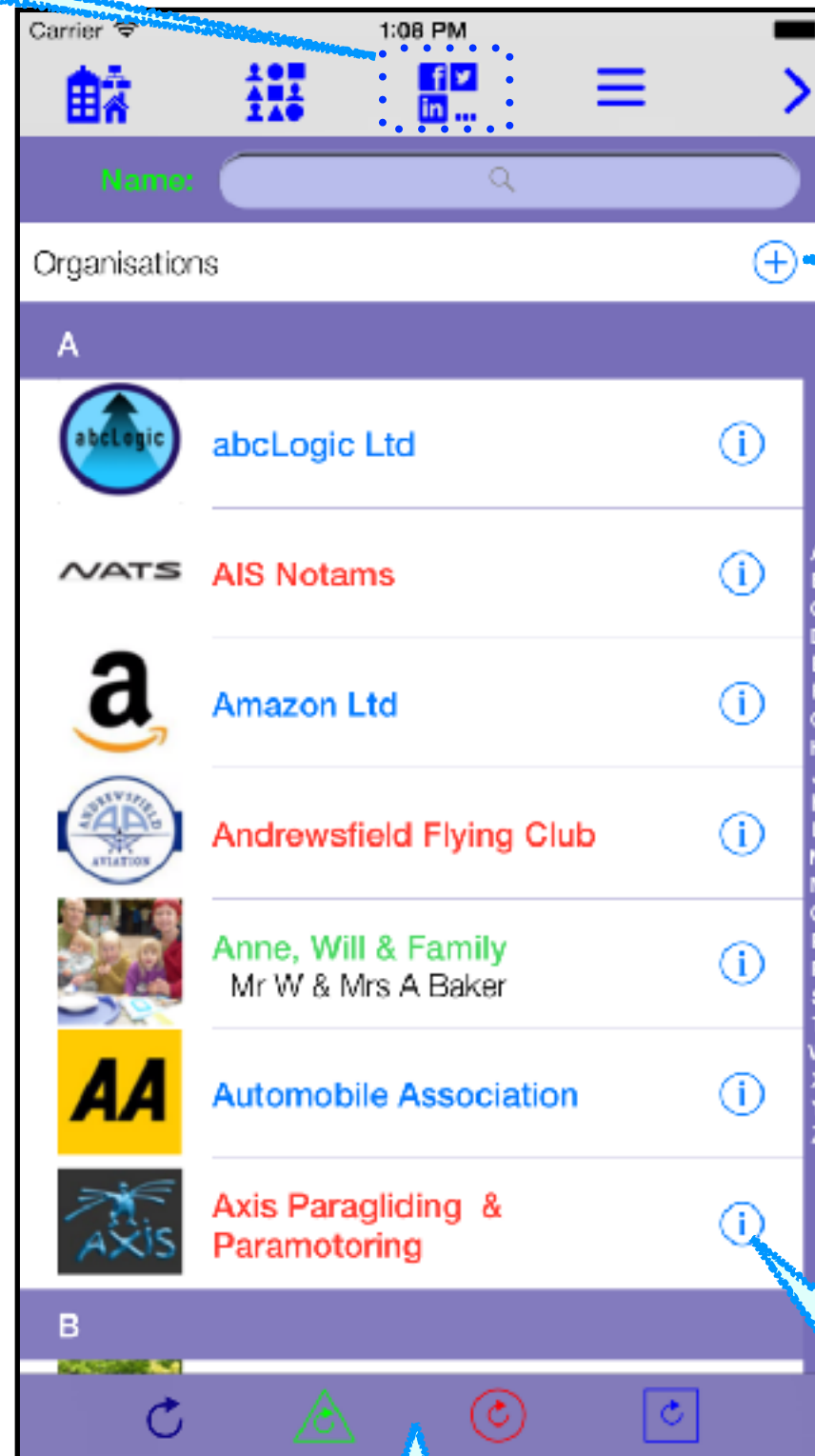
### Services List

Swipe right on a row to display the linked members in the Persons & Tags view.

Swipe left on a row to delete the service group and tags (linked contact details are not deleted).

All services defined for a contact will appear on the Contact Hub view for the contact.

## Service Groups



Service groups and associated tags define access to services for contacts. Each tag can contain a link to two services; either can be a web service or an app on the device.

### Add new service group.

Each group is associated with a type of service, such as Twitter.

The group entry can hold template access details to the service, as a web link and/or an app link. A placeholder can also be used to enter, say, a username from each tag; when a tag is created, the template entry is copied from the group. Alternatively, access details for each contact can simply be entered into the tag.

Access details are user-defined and most services can provide details. Pre-sets for popular services are available in the edit view.

Open a service group entry to edit the group details.

Context filters:  
All, Family, Social, Business

## Contact Hub

(iPad example - 2 views on iPhones)

Summary information from person, tag, organisation and address details.

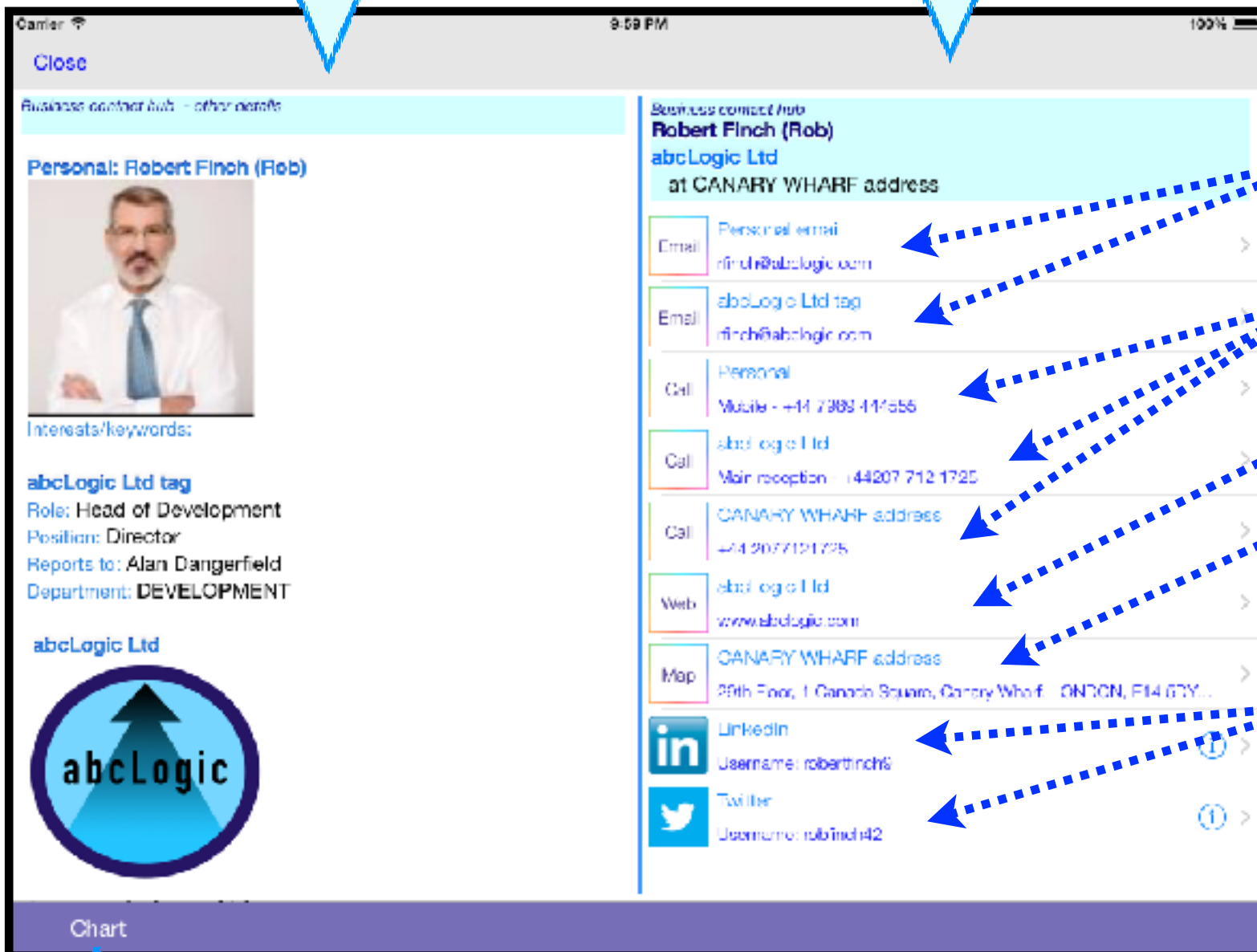
(Scroll to view all details.)

Messaging actions, mapping options and service links from person, tag, organisation and address details.

(Scroll to view all details.)

Tap a row to action or further options.

- Single emails (group emails on a group Contact Hub view).
- Call options are iPhone, VOIP, FaceTime, Text.
- Open browser with the url/link.
- Open map for location view or routing, or to print an envelope address.
- Links to web services and/or installed apps. User-defined and to link to any service or app with available public url/link. Use (i) button to view url detail.



Open organisation chart (business context only)

## Email Distribution

Group name. Can be an organisation or collection group.

Options to re-set ALL entries in the list.

### Distribution List

Details displayed here will be sourced from tags or person details for organisation groups.

Details for collection groups may be sourced from organisations, persons or tags.

List by first name, last name, recently changed or added, or list rows where there is no email entry.

The screenshot shows the 'Email Distribution' screen of an app. At the top, there's a status bar with 'Carrier', signal strength, and time '12:33 PM'. Below that is a header bar with a 'Done' button and the title 'Email Distribution'. The main content area shows a group named 'RGC Training Cadre 2015'. Below the group name is a bar with four options: 'All To', 'All Cc', 'All Bcc', and 'All Exclude'. The list of members includes:

- Andrea Cirrus (Personal email: andycirrus@aol.com) with options: To, Cc, Bcc, Exclude.
- Andrew Comet (Personal email: acomet@hotmail.com) with options: To, Cc, Bcc, Exclude.
- Anthony Blenheim (Personal email: tony@ablenheim.fsnet.co.uk) with options: To, Cc, Bcc, Exclude.
- Darren Horsa (Personal email: dhorsa@btinternet.com) with options: To, Cc, Bcc, Exclude.
- Grenville Diamant (Personal email: grendiamant@gmail.com) with options: To, Cc, Bcc, Exclude.
- Mark Magister (Personal email: mmagi@gmail.com) with options: To, Cc, Bcc, Exclude.
- Mark Trident (Personal email: marktri@hotmail.co.uk) with options: To, Cc, Bcc, Exclude.

At the bottom, there's a bar with four sorting options: 'First', 'Last', 'Recent', and 'No email'.

Settings for group emails are accessed from a group's Contact Hub. (Tap a group row to open the Contact Hub.)

Options for the distribution setting for each group member. New entries are set to 'Exclude'.

### Email Address Source

Organisation - Email address from organisation detail.

Personal - Email from person details.

Tag - Email address from tag (person at organisation) details. If no email address in the tag, the personal email address will be selected.



## Organisation Chart

### Centre Row

Tap to select or deselect the contact in this row, i.e. the chart subject.

When selected, the contact's report up and reports down can be viewed.

When deselected all contacts in the organisation group will be displayed on this row - scroll horizontally to select.

To add reporting lines from other contacts not currently in view, select ALL from the bottom bar. All contacts in the organisation group will be displayed in first name order in the top and bottom bars. Scroll horizontally to align reports with the centre row, tap the joining line to set and unset reports.

Select Not set from the bottom bar to show only contacts where there is no reporting line.



The chart view is available for business organisations only and is accessed from the organisation's Contact Hub, or a tag's Contact Hub or Edit view.

Report lines are recorded as set and unset; no save is necessary.

Tap the line to set or unset a report up. An aligned report contact in the top row can be moved to the centre row by a swipe down; must be a report, i.e., with solid line

Tap the line to set or unset a report down. An aligned report contact in the bottom row can be moved to the centre row by a swipe up; must be a report. On larger screens with multiple contacts visible on the bottom row, first select (tap) the contact to move up (orange highlight set).

Reports - Show reports for selected contact. All - view all contacts in top and bottom rows. Not set - as ALL, but only contacts with no report defined.

On an iPhone 4S, to temporarily hide the top and bottom bars tap the green background above or below the chart. Next tap restores the bars.

## Search Options and Entries (iPhone 6+ examples)

### Groups View

Tap 'Name' for search options

### Persons & Tags View

Tap 'Name' for search options

Choose an option and enter text for the search. Partial details can be entered, e.g., 'com' will find 'British Telecom' and others with 'com' anywhere in the name.

A person 'Name' search can be entered with first and last names or parts of names, e.g.,

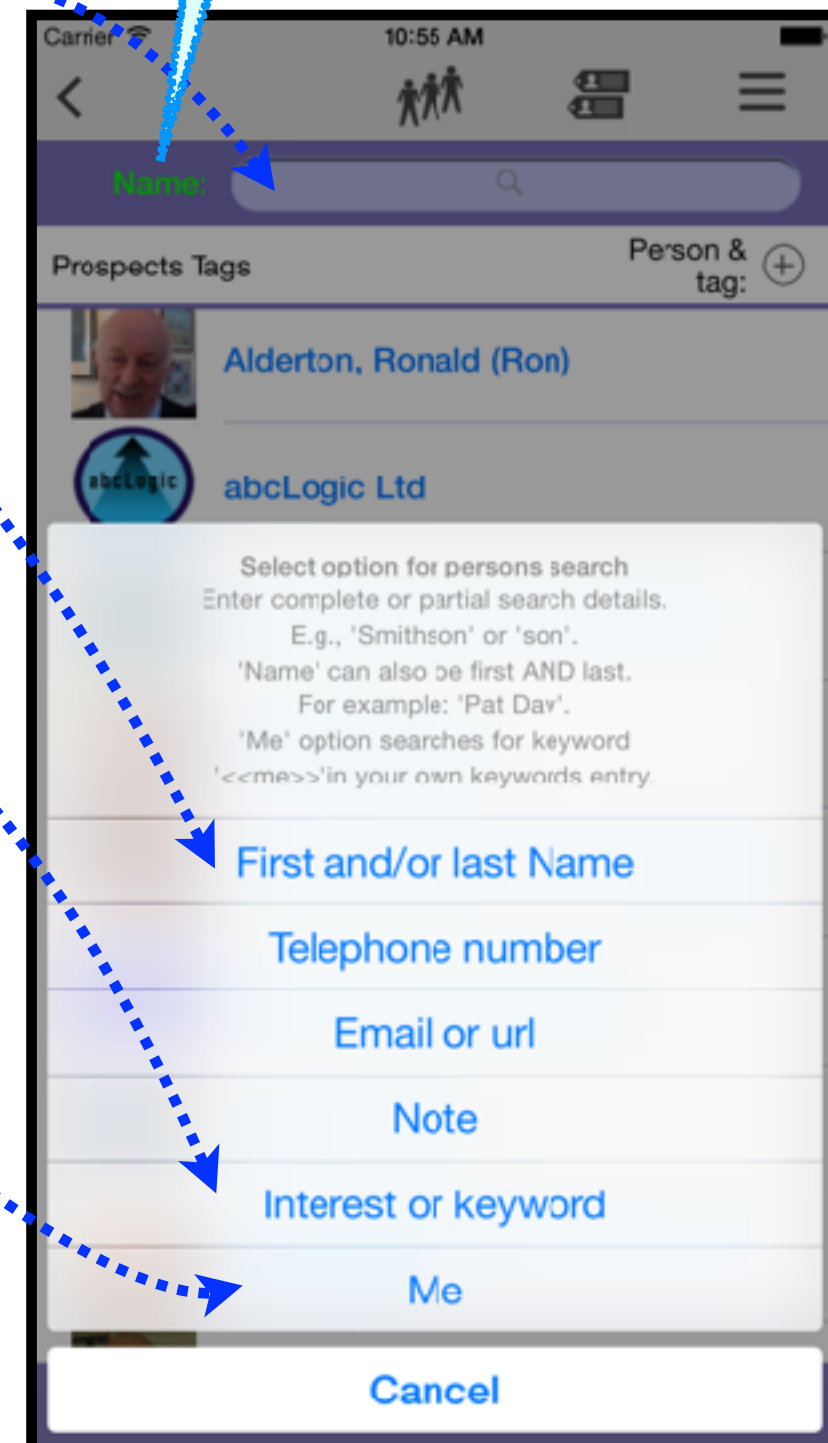
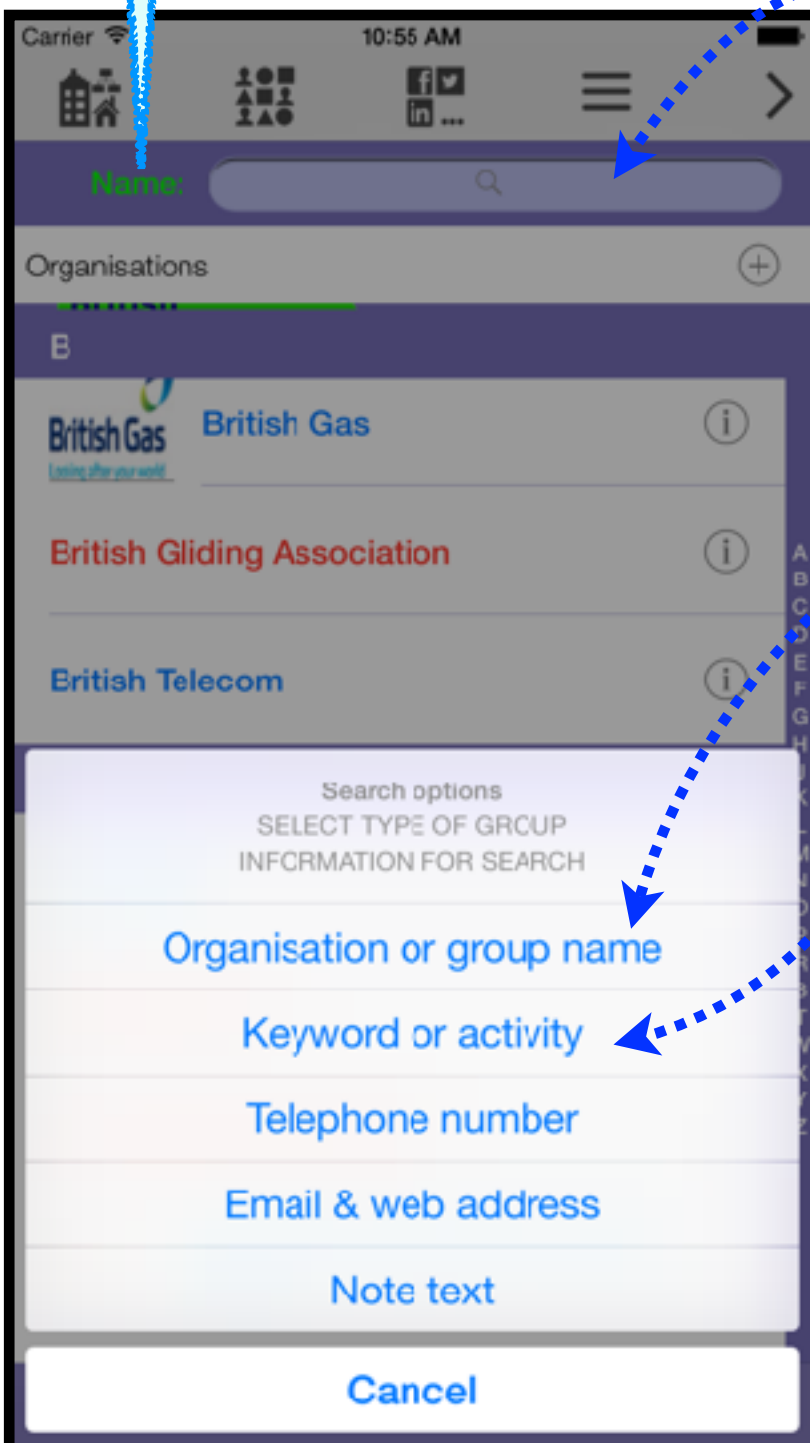
'Fred Smith' (or even 're mit').

Family name searches will include legal name and salutation name.

Keywords can be entered in the edit view for a person and all types of groups.

The 'Me' option looks for a special keyword entry '<me>'. (User will need to add this keyword to their own details.)

The search entry will remain active if another list option is selected from the top bar. To cancel the search filter delete the entry.



Example - tag 'Tom Ashcroft' to 'abcLogic Ltd'  
Tom works at abcLogic so a tag will be created to hold his work contact details.

(1) abcLogic Ltd has been scrolled (or searched) into view in the Organisation List view,

(2) Select Persons and scroll/search to get our source 'Tom Ashcroft' into view.

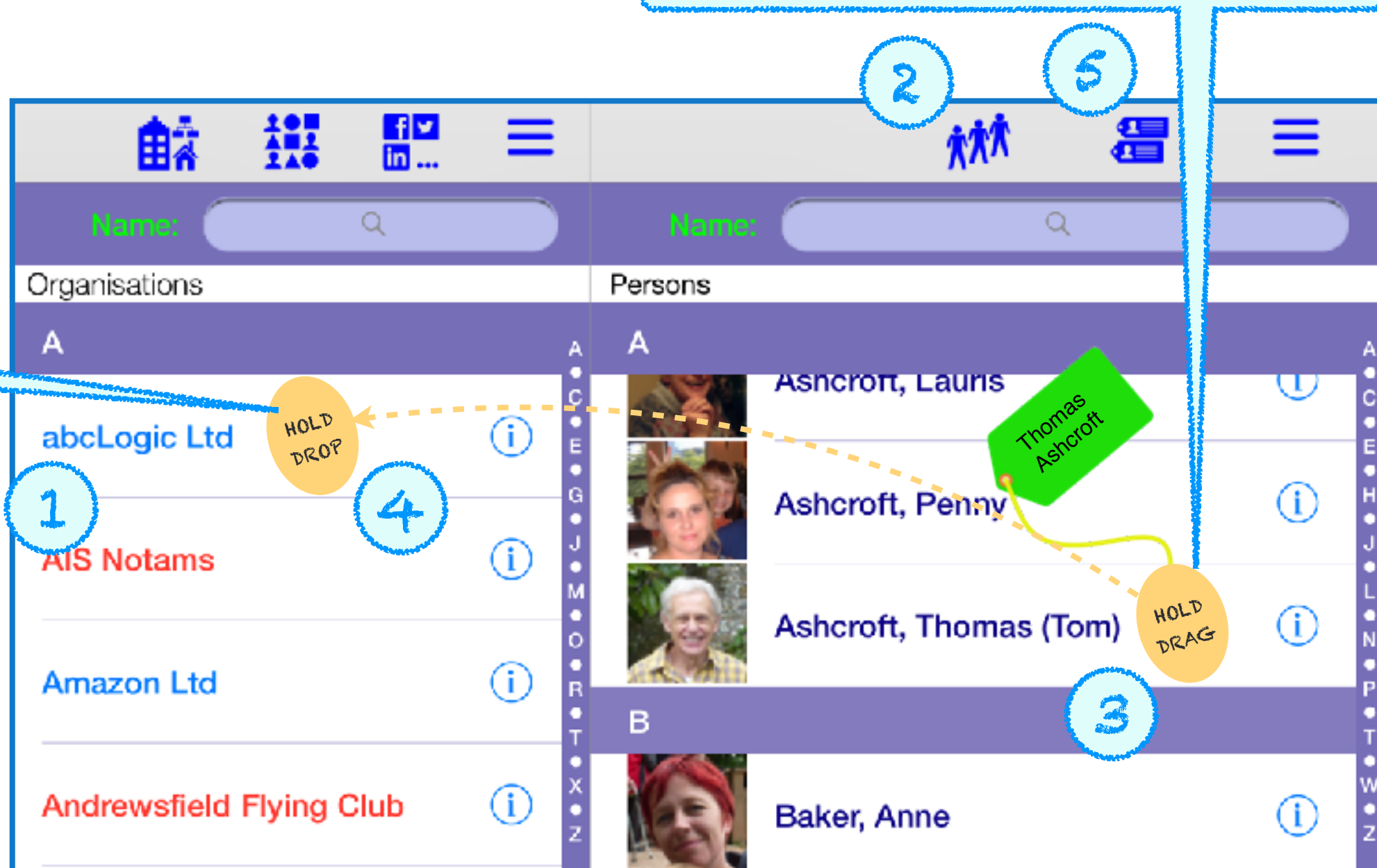
(4) Drop (release) the flag onto the target collection.  
A tag record is created for the person at the organisation  
An off-target release (e.g. no drag) will open the Person Edit view for Tom Ashcroft.

(5) The source can be another tag for Tom, from the Tags list, but the action will be as if the person entry was selected.

To edit and add details to the tag, select (swipe) abcLogic group to display all its tags, or select Tom Ashcroft (i) to display all his tags. Then select (i) on the tag to open the Tag Edit view.

Tag person details to an organisation  
or to an address within the organisation  
(iPhone 6+ example)

(3) Tap, hold and drag the tag (green flag, 'Tom Ashcroft' will appear) into the target organisation row 'abcLogic Ltd'.



To tag to an address for the organisation, open the address view - tap (i) on the row.  
Each person entry can be tagged to multiple organisations, collections and services.



Example: Add tag 'Rob Finch at abcLogic Ltd' to the 'Prospects' collection group

(1) 'abcLogic Ltd' has first been selected (swiped right) in the Organisation List view and its tags are now displayed in the right-hand view.

(2) Select Collections List and scroll or search to get collection 'Prospects' into view.

(4) Drop (release) the flag onto the target collection and the tag will now be a member of the 'Prospects' collection group.

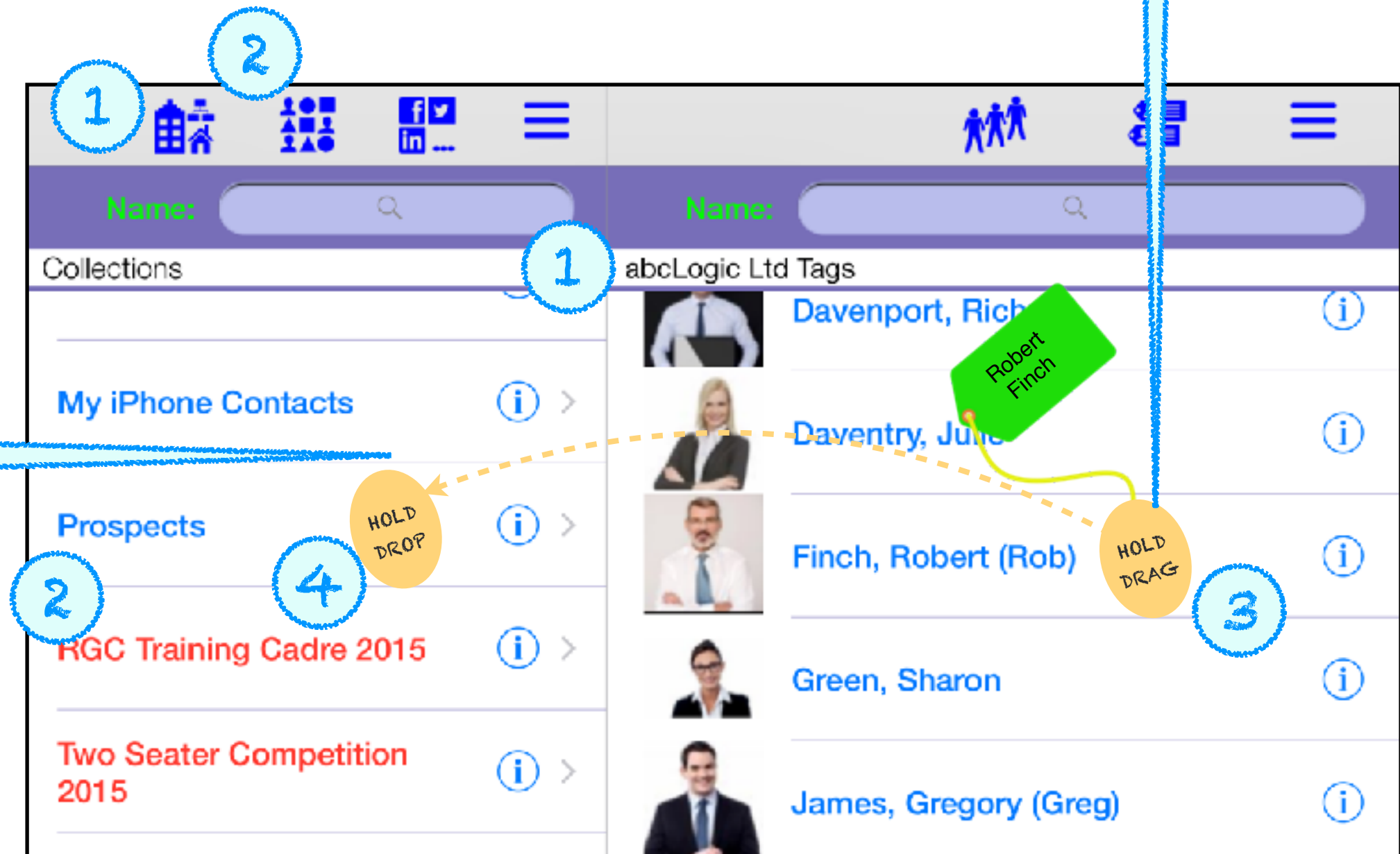
An off-target release (e.g. no drag) will open the Person Edit view for 'Robert Finch'.

Rob's abcLogic tag will appear when either the company or the 'Prospects' collection is selected.

Collection groups hold links to contact entries (not tags). If the target is a service group, service tags will be created, to hold access details for each grouped contact.

Add a tag to a collection or service group  
(iPhone 6+ example)

(3) Tap, hold and drag the source tag (green flag, 'Robert Finch' will appear) to the target collection row 'Prospects'.



The actions are the same if the target is a service group. Each tag entry can be added to multiple collections and services.

Example: 'British Telecom' organisation into 'Prospects' collection

- (1) 'Prospects' has been selected/swiped in the Collection List view, to display members in right-hand view.
- (2) The Organisations icon is then selected so we can get our source 'British Telecom' into view.

(3) Tap, hold and drag the organisation (green flag, 'British Telecom' will appear) into the target 'Prospects' collections list.

The source can also be an address of the organisation, in the Address List view; tap (i) in an organisation row to list addresses.

Collection groups hold links to contact entries (not tags). If the target is a service group, service tags will be created, to hold access details for each grouped contact.

## Add Organisation to Collection or Service Group (iPhone 6+ example)

(4) Drop (release) the flag onto the target collection, anywhere in the right-hand list. An off-target release (e.g. no drag) will open the Organisation Edit view for 'British Telecom'.



The actions are the same if the target is a service group.  
Each organisation entry can be added to multiple collections and services.



The storage in use is noted here, as well as indicated by the three-line 'More' icon; vertical lines - iCloud storage in use, horizontal lines - local storage.

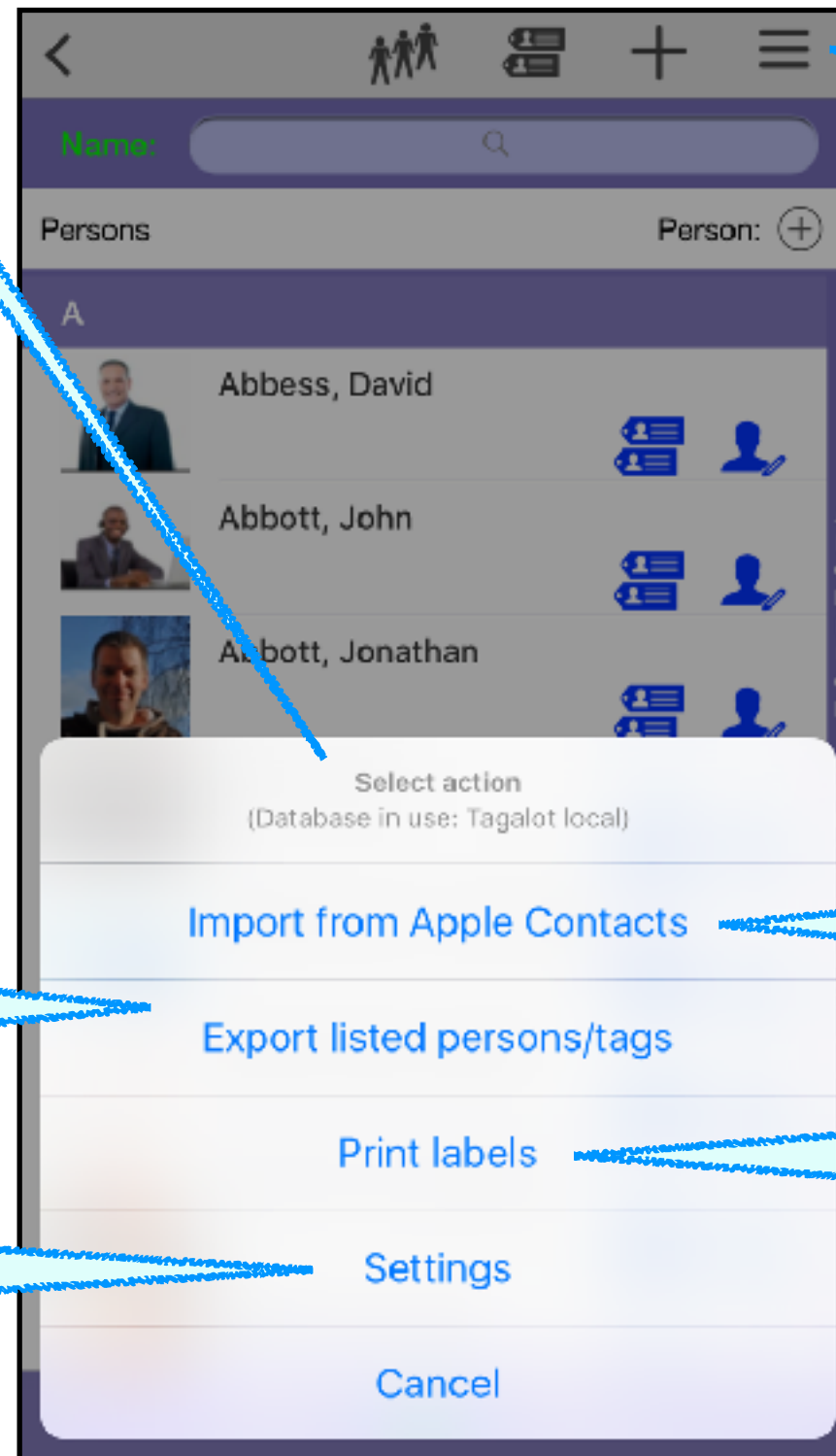
### Export

Your contacts are not locked into Tagalot. Group or select the required persons and tags in the Persons and Tags view, then export to your Apple Contacts, or as vCards, or as a formatted text file. Similarly, organisation details can be exported from the Groups view, using the more icon in the top bar. See Export Guide for more details.

### Settings

View the current Tagalot database size, migrate to iCloud storage, copy iCloud data to the device's storage, or delete the local storage database. See Manage Tagalot Data for more details.

## More Options



Tap the three-line 'More' icon for to list options. The Groups view has a similar icon, which accesses just the export option for listed organisations.

### Import

Import contacts from the Apple Contacts address book. Options to create Tagalot collection groups from Apple groups and business organisations from company names. Use the Apple Contacts as your 'front-line' contacts, copy to Tagalot Contacts routinely for new additions; duplicates will not be created or overwritten. See Import Guide for more details.

Print address labels for persons or tags currently listed in the Persons & Tags view, in a 2-col x 7 row format, A4 or Letter paper. Reminder - print a single envelope-style address from the address row on a Contact Hub view



# Import Guide

Tap 'Import' when the required options have been set.

Current numbers from the Apple Contacts app.

CloseImport

Import Apple Contacts

Apple Contacts	Current
Persons:	6
Companies:	2
Addresses:	7
Groups:	2
Members:	0

☒ [ON] Create a Tagalot organisation entry from each unique company

☒ [ON] Create a Tagalot collection entry from each group.

Tagalot Contacts	Before	After	Change
Persons:	297	0	0
Organisations:	80	0	0
Addresses:	122	0	0
Collections:	10	0	0
Services:	15	0	0
Tags:	286	0	0

Pre- and post-import numbers for the Tagalot Contacts database.

## Company name option

If ON, company name entries in the Apple Contacts will be used to create a business organisation entry in Tagalot, without duplication. If the company name is entered with a person's details, a tag to the organisation will also be created for the person.

If OFF, company names in person contacts, and separate company name contact entries will be ignored.

## Apple groups option

If ON, groups in Apple Contacts will be created as Collection groups in Tagalot, with the same Apple group contacts as members.

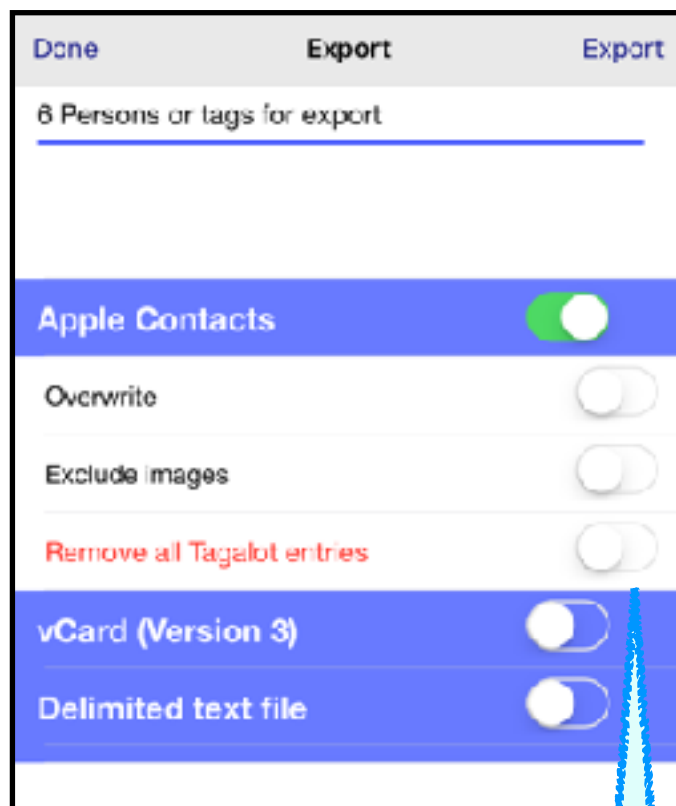
If OFF, the groups will be created as business organisations and the grouped Apple contacts as tags to the organisation.

The import process checks for duplicates in Tagalot, matching on the following key fields: first name, last name and email for person contacts, and group or company name for other contact types. No duplicates will be entered, updated, or overwritten. Changing these key details in Apple Contacts will result in a new entry in Tagalot on a subsequent import.

## Export Guide

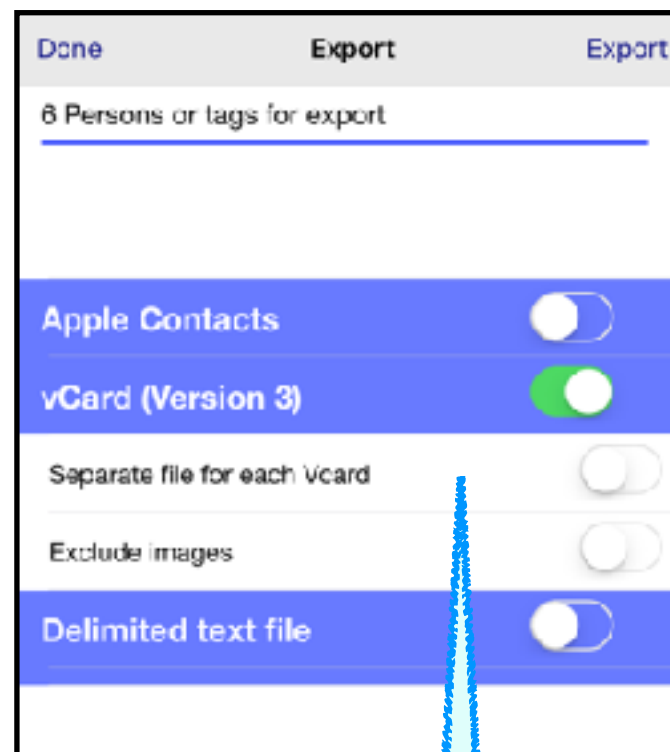
The source items are first selected, either in the Organisations List view, or the Persons & Tags view. Organisation Lists may be filtered by context and/or a search entry. The Person & Tags list can contain person entries, person with addresses, or members of a selected organisation or collection group, optionally filtered by a search entry. Export is not available for the Tags list, single person with tags list or service groups. Tap an export option switch for further options, as shown below.

### Apple Contacts



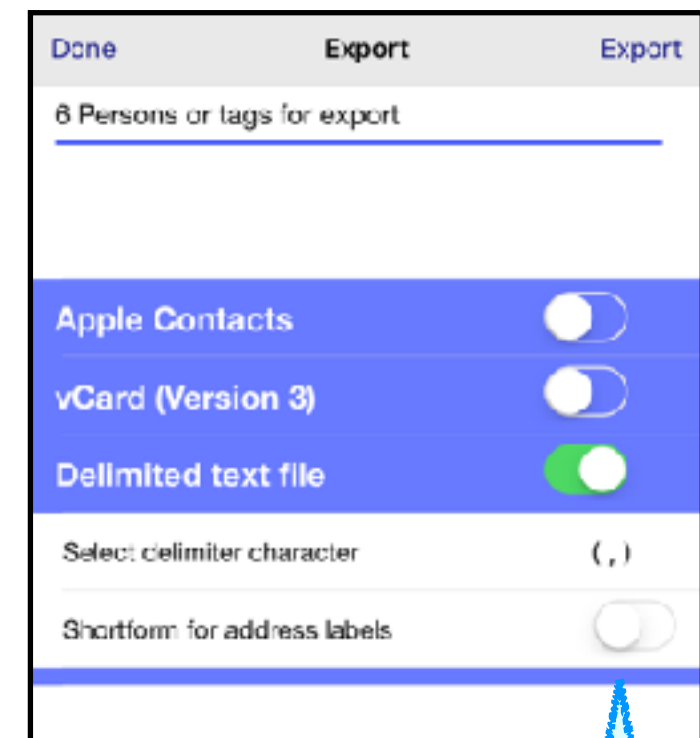
The remove entries option does not export, but removes all entries in Apple Contacts, which have previously been exported from Tagalot. I.e., all entries in the Apple Contacts '[Tagalot]' group.

### vCard 3.0 text file(s)



Option for all cards in one text file or a separate file for each card. Option to exclude image data, which can be a large volume.

### Delimited text file



Tap the delimiter character to change. The short form option exports just the name and address details, e.g., for export to other label printing apps.

Exported text files can be copied using app access in iTunes on a desktop pc or laptop, with the source device connected. (Additional file handling options will be available in a future release of Tagalot Contacts.)

## Settings - Data Storage

Select 'Enable' for iCloud or device storage for your Tagalot database.

An 'Options' button appears when the required store is active.

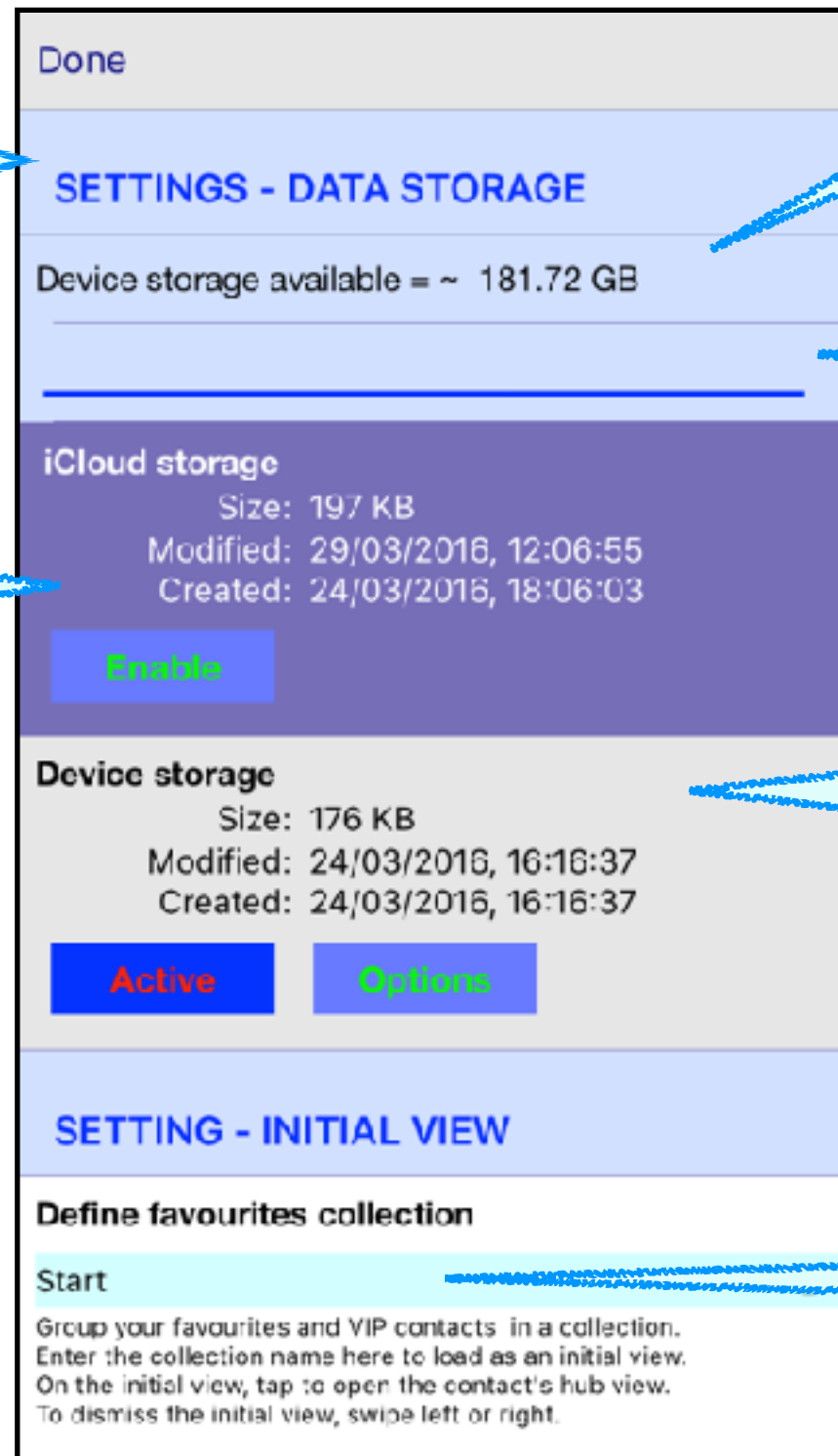
See following notes on Data Storage and available options.

### iCloud storage

The iCloud process maintains its own copy of the Tagalot database on the device. When enabling iCloud storage, ensure sufficient space is available for the iCloud copy. When iCloud storage is active the 'More' (3 lines) main menu option changes from horizontal lines to vertical lines.

Unless you are prepared to lose all data on your device, you must be backing up, either automatically with the use of iCloud for all your apps, or manually and routinely using iTunes on a desktop pc or laptop.

## Settings



The Settings view displays the approximate free storage space on your device. Current details for iCloud and device Tagalot databases are displayed below.

Progress details, including a bar or activity wheel, when changes are being processed.

### Device (local) storage

Your Tagalot local database is a separate copy and is not affected by iCloud use, unless the iCloud option to copy to (and overwrite) is used. It is possible to run both local and iCloud copies of your Tagalot data, enabling each as required, or with copying, keep your local version as a backup of your iCloud data.

### Setting - Initial View

If an existing collection group name is entered here the group's members (any type of contact) will be displayed when Tagalot starts, or when selected from the 'More' menu.

Settings - Data Storage continued ..



## Settings - Data Storage continued

### Migrating to iCloud

1. Only use iCloud storage for Tagalot if you need to share and synchronise your Tagalot data across devices. You can separately decide to use iCloud for backup of all your device data, but this does not share or synchronise the Tagalot data.
2. Ensure you have sufficient storage space, both on your device and in your iCloud account. Use IOS Settings → Storage and iCloud.
3. Whenever you login to iCloud in IOS Settings, it automatically enables backup to iCloud. To minimise your iCloud storage you can disable iCloud backup and use only the manual backup to a PC through iTunes.
4. Select 'Enable' for iCloud in the Settings view. The migration starts by making a local copy of the database, and it switches to this when complete. Refresh your Tagalot list views using the top menu bar icons.
5. If, or when, a network connection is available, the iCloud copy is uploaded to the Apple iCloud servers. This is a background process (i.e., not visible) and can take a long time with a large database, so consider leaving the upload to run overnight. Migrate your other device(s) when the upload is complete - check Tagalot usage in iCloud using IOS Settings.
6. On the other devices you wish to synchronise your Tagalot database, ensure each device is logged into the same iCloud account.

7. In Tagalot Settings select 'Enable' for iCloud on your other device(s). The Tagalot data now has to be downloaded, and this requires a network connection. After a delay, but not as long as the initial upload, the Tagalot data from iCloud will appear (this may require a refresh using the top bar menu icons).

### Using iCloud

1. Your Tagalot data will be synchronized between devices when iCloud storage is enabled and you are logged into the same iCloud account on each device.
2. It is advisable to keep logged in to your iCloud account, and not swap between other iCloud accounts on your device.
3. Moving between offline and online should not be a problem, as synchronisation 'catches up', when you connect to your network, typically after a small delay.
4. Maintain sufficient free storage on your device and for your iCloud account (which is chargeable over 5GB).
5. It is advisable to routinely copy your iCloud Tagalot database to your device. If you ever need to reset your iCloud data, or change to a new account, the device copy could be used to reload the data to iCloud.

## Settings - Data Storage continued

### iCloud Storage Options

When the iCloud store is active the following options are available.

1. Copy device store to iCloud - Copies the Tagalot database on this device to iCloud. Use this option where an initial load to iCloud is required. This option should be used on one device only unless certain another device contains only different contacts, otherwise duplicates may be created.
2. Copy iCloud store to device - The Tagalot iCloud database will be copied to and REPLACE the database on this device. Use to create a copy to subsequently reload, e.g., when changing or resetting your iCloud account.
3. Refresh - Restores the Tagalot iCloud database from the iCloud host servers. Use this option first if the iCloud data becomes inconsistent. See 'Fixing iCloud' if problems persist.

### Device Storage Option

When the device store is active the only option available is to reset the Tagalot database. This clears all entries and leaves an empty database containing only the 'Tagless Individuals' built-in collection group. **Selecting this option will immediately clear the data.**

### Fixing iCloud

The Apple iCloud synchronization process is generally reliable but if it becomes inconsistent symptoms can include entries not updating across devices or the app crashing soon after launching. See FAQ 003 in the Support section at [www.tagalot.biz](http://www.tagalot.biz) for actions to fix problems with iCloud.

Further help available at [support@tagalot.biz](mailto:support@tagalot.biz)