

# Keeping Track of People

## 1. It's all about communicating

- 1.1. At its core, our devices are for communicating with others
- 1.2. Use the Contacts app to keep track of information about people and businesses
- 1.3. Maybe the most boring app on any of your Apple devices...but maybe also the most important
- 1.4. It runs through many apps on your devices: Mail, Phone, Messages, Find My, Maps, FaceTime, Calendar....

## 2. The Contacts app

- 2.1. Put everyone in; in many cases, a person has to be in the Contacts app to be identified in other apps
- 2.2. One card per person
- 2.3. Be as complete and as accurate as possible
  - 2.3.1. Put data in the proper fields
  - 2.3.2. Include first and last names
  - 2.3.3. Include area codes in phone numbers
  - 2.3.4. Use labels correctly: address location, types of phone numbers and email addresses
  - 2.3.5. Add a photo. Look on the internet, your photo library, or take one.
    - 2.3.5.1. Photos are used in various apps: Phone, Messages, FaceTime, Find My...
- 2.4. Create a card for yourself
  - 2.4.1. Add in everything about you: phone numbers, addresses, relatives
  - 2.4.2. Identify that card as belonging to you
    - 2.4.2.1. Mac: In the Contacts app, select your card, then choose Card > Make This My Card
    - 2.4.2.2. iOS/iPadOS: Settings > Contacts > My Info and tap your name listed in the Contacts app
  - 2.4.3. Makes using Siri easier
    - 2.4.3.1. "What's my brother's work address?"
    - 2.4.3.2. "Send a message to my sister."
    - 2.4.3.3. "Take me home."
    - 2.4.3.4. "Pay George Washington \$20 with Apple Pay"

## 2.5. Lists

### 2.5.1. Create lists on the Mac

2.5.1.1. File > New List and drag cards to the group

2.5.1.2. Or select the cards first then choose File > New List from Selection

2.5.1.3. Email can be addressed to a group and the Mail app will fill in the addresses group members

### 2.5.2. Lists sync through iCloud

## 2.6. Smart Lists

2.6.1. Only on the Mac; they do not sync through iCloud

2.6.2. Like a saved search, which can update

2.6.3. Cards which match criteria will be included in the smart group

2.6.4. File > New Smart List...

## 2.7. Search

2.7.1. Search for any information on a card, not just a name

## 3. Preferences/Settings

3.1. Contacts > Settings

3.2. Choose to sort by first or last name

3.3. Choose a display format—first name first or last name first

3.4. Short name option

3.5. Siri suggestions

3.5.1. Siri will recognize contact information found in email messages and other items and offer to add it to contact cards

3.6. Accounts

3.6.1. Contacts can be stored with various online services, including iCloud, Google, and Yahoo

3.6.2. All of these contacts can be displayed in the Contacts app

3.6.3. Accounts

3.6.3.1. Click the plus button to add an account

3.6.3.2. Sign in with your user name and password

3.6.3.3. For iCloud, use Apple > System Preferences > Apple ID/iCloud and turn on the Contacts

3.6.3.4. Best strategy: Pick one online vendor and put all your contacts there.

Transferring these contacts to one account is best accomplished on the Mac with the Contacts app or Safari

3.7. Create a template for new contact cards

#### **4. Dealing with duplicates and scattered info**

4.1. Card > Look for Duplicates

4.2. Card > Merge Selected Cards

#### **5. The Payoff**

5.1. Contacts

5.1.1. Tap/click to message, call, FaceTime, mail, or use Apple Pay with a contact

5.1.2. Share any contact card—even your own—via Mail, Messages, AirDrop as a vCard.  
Recipients tap the vCard to add it to their Contacts app

5.1.3. Tap/click the map image/icon to see the address in the Maps app

5.1.4. Tap/click URLs to open websites

5.2. Calendar

5.2.1. Birthdays entered in Contacts app automatically appear in the Calendar's Birthdays calendar. If you can weasel the birth year out of a contact, the Calendar will calculate the birthday.

5.2.2. Contacts will match email addresses of people invited to calendar events

5.3. Mail

5.3.1. Contacts will match the email addresses of senders and display their name and photo

5.3.2. Contacts will match the names of recipients in your contacts app (and previous recipients) as you type

5.3.3. Click a sender or recipient to...

5.3.3.1. ...create a new contact

5.3.3.2. ...add information to an existing contact

5.3.3.3. ...add to VIP

5.4. Messages

5.4.1. Contacts will match the email address or phone number in a conversation and...

5.4.1.1. ...display participants' names and photos on the screen

5.4.1.2. ...filter messages from unknown senders into a separate list

5.4.1.2.1. View > All Messages, etc.

5.4.1.3. ...offer to share your name and photo with people in your Contacts app the next time you send a message. (Set up in Messages > Settings on Mac.)

## 5.5. FaceTime

5.5.1. Contacts will match the email address or phone number of incoming calls and display the caller's name and photo on the screen

## 5.6. Focus

5.6.1. Identify your Favorites or any other group to allow incoming calls and notifications when a Focus status is enabled

## 5.7. Family Sharing

5.7.1. Pictures of family members will appear in the Family Sharing list, shared services, and shared purchase

## 5.8. Find My

5.8.1. Names and photos of people you are sharing your location with appear in the People list; photos will appear on a map when their name is tapped

## 5.9. Shared documents

5.9.1. Pages, Numbers, and Keynote documents shared through iCloud will include pictures of people you are sharing the document with

## 5.10. Reminders

5.10.1. Names and pictures of people you share a list with appear in the list

## 5.11. Maps

5.11.1. Enter the name of a contact in the search field to get directions

## 5.12. AirDrop

5.12.1. Permit others to send items to you wirelessly at very short range

5.12.2. System Settings > General > AirDrop

5.12.3. No One, Contacts Only, Everyone

5.12.4. Use Share Sheet and choose AirDrop to send contact info, weblinks, photos, documents, etc. to other Apple devices

## 6. And on the iPhone and iPad...

### 6.1. Phone

6.1.1. Contacts will match the phone number of incoming calls and...

6.1.1.1. ...display the caller's name and photo (or Contact Poster) on the screen

6.1.1.2. ...show the caller's name in the recents list

6.1.1.3. ...show the caller's name in visual voice mail

6.1.1.4. Tapping the i button in the list of recents will bring up the caller's contact card

6.2. Health

6.2.1. Designate people—who must be in the contacts app—as an Emergency Contact in iPhone's Health app

6.2.2. When you use Emergency SOS to call emergency services, it also sends a message with your current location to your emergency contacts with a mobile number

## 7. Good places for help

7.1. Apple: [www.apple.com/support/](http://www.apple.com/support/)

7.2. Me: Mike Matthews [mamatthews@icloud.com](mailto:mamatthews@icloud.com) (925) 876-4098

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