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: 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. Will make 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 $20 with Apple Pay"

2.5.   Groups

    2.5.1.   Create on the Mac

    2.5.2.   File > New Group and drag cards to the group

    2.5.3.   Or select the cards first then choose File > New Group from Selection

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

2.6.   Smart Groups

    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 tour

    2.6.4.   File > New Smart Group…

2.7.   Search

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

3. Preferences/Settings

3.1.   Mac: Contacts > Preferences; iOS, iPad OS: Settings > Contacts

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

3.3.   Choose to sort by first or last name

3.4.   Mac options: Create a template for new contact cards, Private Me card, vCard

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

4. Using Accounts

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

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

4.3.   On the Mac: Contacts > Preferences > Accounts

    4.3.1.   Click the plus button to add an account

    4.3.2.   Sign in with your user name and password

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

4.4.   On iOS/iPadOS

4.4.1.   Settings > Contacts > Accounts > Add Account

4.4.2.   Sign in with your user name and password

4.5.   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

5. The Payoff

5.1.   Contacts

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

5.1.5.   Add to Emergency Contacts; part of the Health app

5.1.6.   Share my Location

5.2.   Phone

5.2.1.   Contacts will match the phone number of incoming calls and…

5.2.1.1.   …display the caller's name and photo on the screen

5.2.1.2.   …show the caller's name in the recents list

5.2.1.3.   …show the caller's name in visual voice mail

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

5.2.2.   Contacts can be added to the Favorites list

5.2.2.1.   Favorites can be created for phone, email, messages, and FaceTime

5.3.   Calendar

5.3.1.   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.

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

5.4.   Mail

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

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

    5.4.3.   Click/tap a sender or recipient to…

        5.4.3.1.   …create a new contact

        5.4.3.2.   …add information to an existing contact

        5.4.3.3.   …add to VIP

5.5.   Messages

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

        5.5.1.1.   …display participants' names and photos on the screen

        5.5.1.2.   …filter messages from unknown senders into a separate list in iOS/iPadOS (Settings > Messages > Filter Unknown Senders)

        5.5.1.3.   …offer to share your name and photo with people in your Contacts app the next time you send a message. (Set up in Settings > Messages on iOS/iPadOS or Messages > Preferences on Mac.)

    5.5.2.   Tapping the sender's name, then the i button will bring up the sender's contact card. You can share your location or send your current location

5.6.   Health

    5.6.1.   Designate people as an Emergency Contact in iPhone's Health app

    5.6.2.   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

5.7.   FaceTime

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

5.8.   Location Sharing/Find My

    5.8.1.   Enable it on the Find My app on iPhone, iPad, or iPod Touch

        5.8.1.1.   Tap Me.

        5.8.1.2.   Tap Share My Location to enable the Share My Location service.

          5.8.1.3.   Tap People.

          5.8.1.4.   Tap Share My Location and enter the name or phone number of the person you want to share your location with. Or tap the + button to access your contacts

          5.8.1.5.   Tap Send.

          5.8.1.6.   Choose to share your location for One Hour, Until End of Day, or Share Indefinitely.

          5.8.1.7.   Tap OK.

      5.8.2.   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.   Do Not Disturb

      5.9.1.   Identify your Favorites or any other group to allow incoming calls when Do Not Disturb is enabled

   5.10.   Family Sharing

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

   5.11.   Shared documents

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

   5.12.   Reminders

      5.12.1.   Names and photos of people you share a list with appear in the list

6. Good places for help

   6.1.   Apple: www.apple.com/support/

   6.2.   Get Apple's free User Guides at Book Store within Books app

   6.3.   Me: Mike Matthews mamatthews@icloud.com   (925) 876-4098

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