todoist
Setup Guide

CP | **Carl Pullein**

Step 1

Download the app from your app store of choice

Todoist is available on almost all platforms. You can download the app for FREE on iOS, Mac OS, Windows, Android, Windows Mobile and Blackberry.
You can also use Todoist on the web via www.todoist.com

Once you open Todoist for the first time, you will be asked to create an account.

All you need is your email address and a password to get set up.
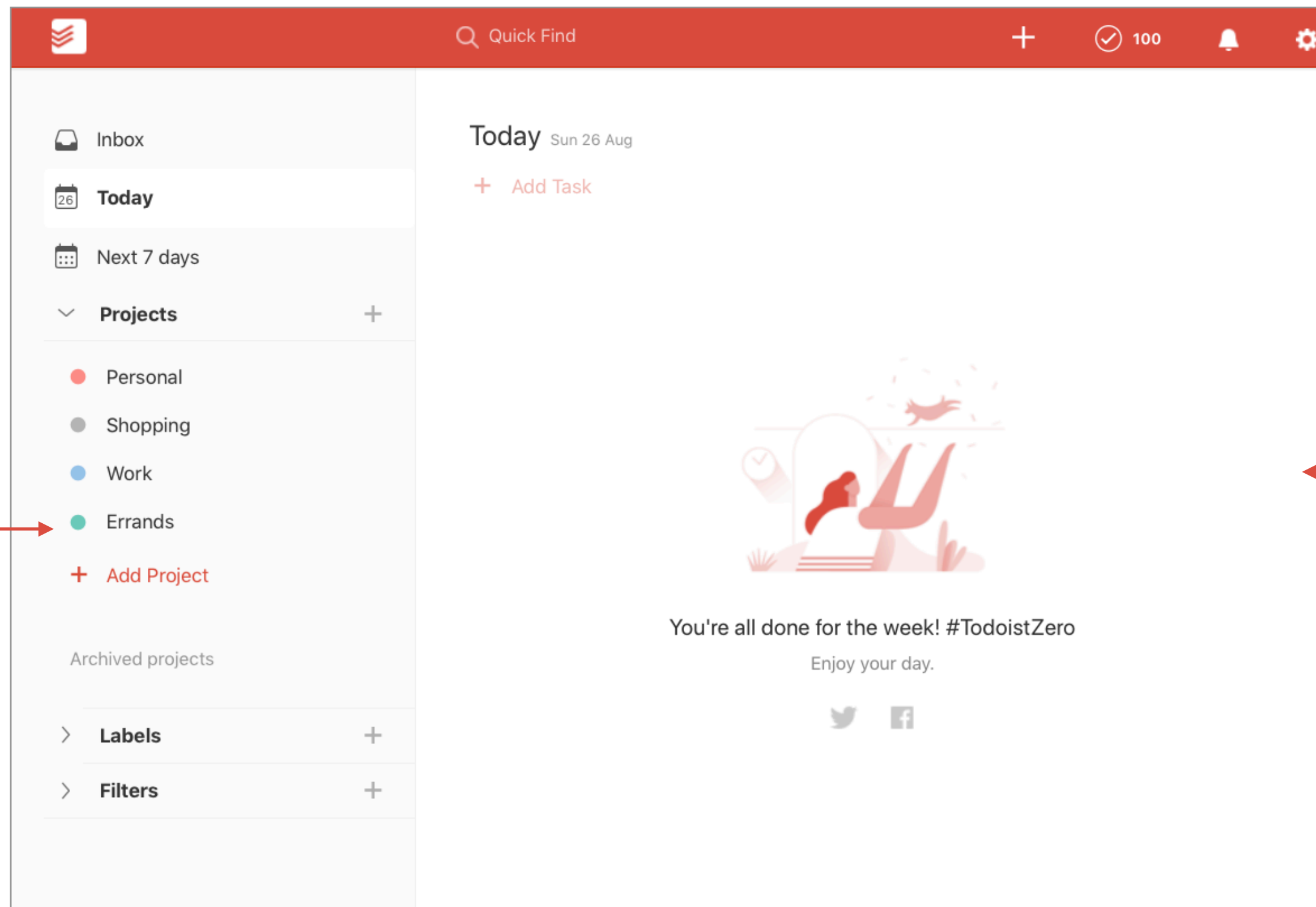
Getting To Know Todoist

The basic interface.

The Sidebar:
Here you will find all your projects, labels and filters.

You will also find your list of tasks for today and the next seven days as well as you inbox for tasks you have collected.
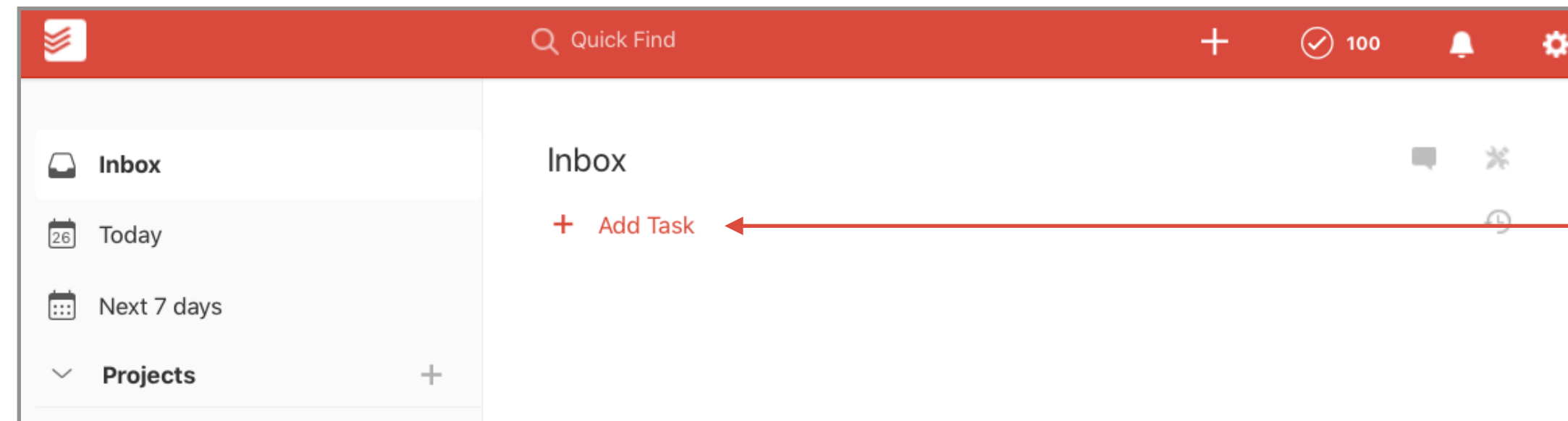
When you first open Todoist, you will find some projects already created for you. You can change these very easily.

The right-hand side is where you will see your complete lists.

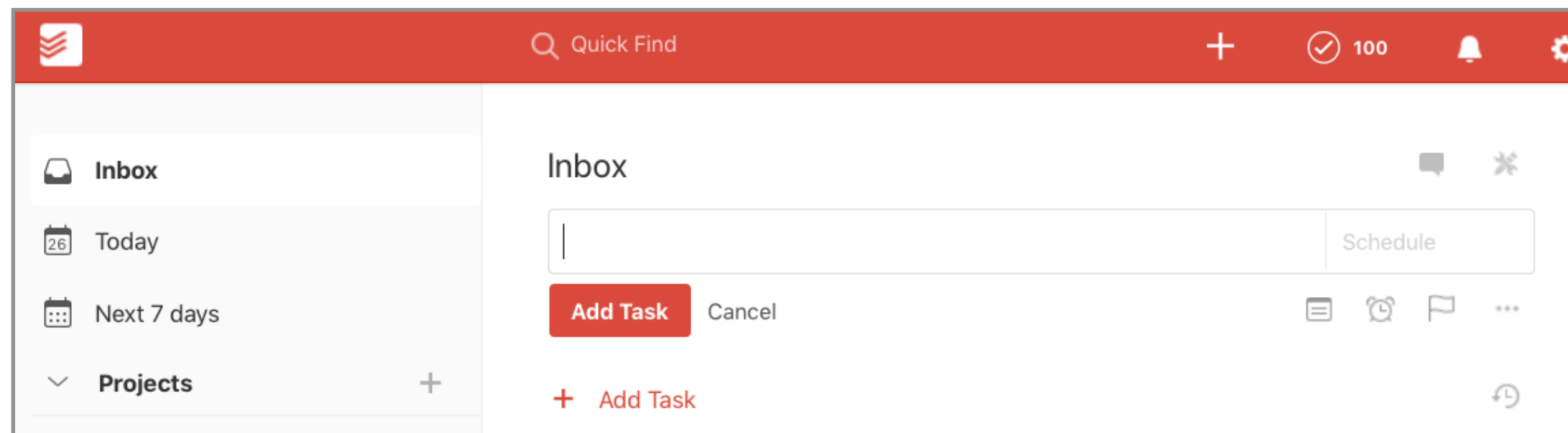Quick Find · 100

Inbox

Today

Next 7 days

⌄ Projects +

● Personal
● Shopping
● Work
● Errands

+ Add Project

Archived projects

> Labels +

> Filters +

Today Sun 26 Aug

+ Add Task

You're all done for the week! #TodoistZero

Enjoy your day.

Getting To Know Todoist
Creating tasks.

Click on your inbox to go to your inbox.
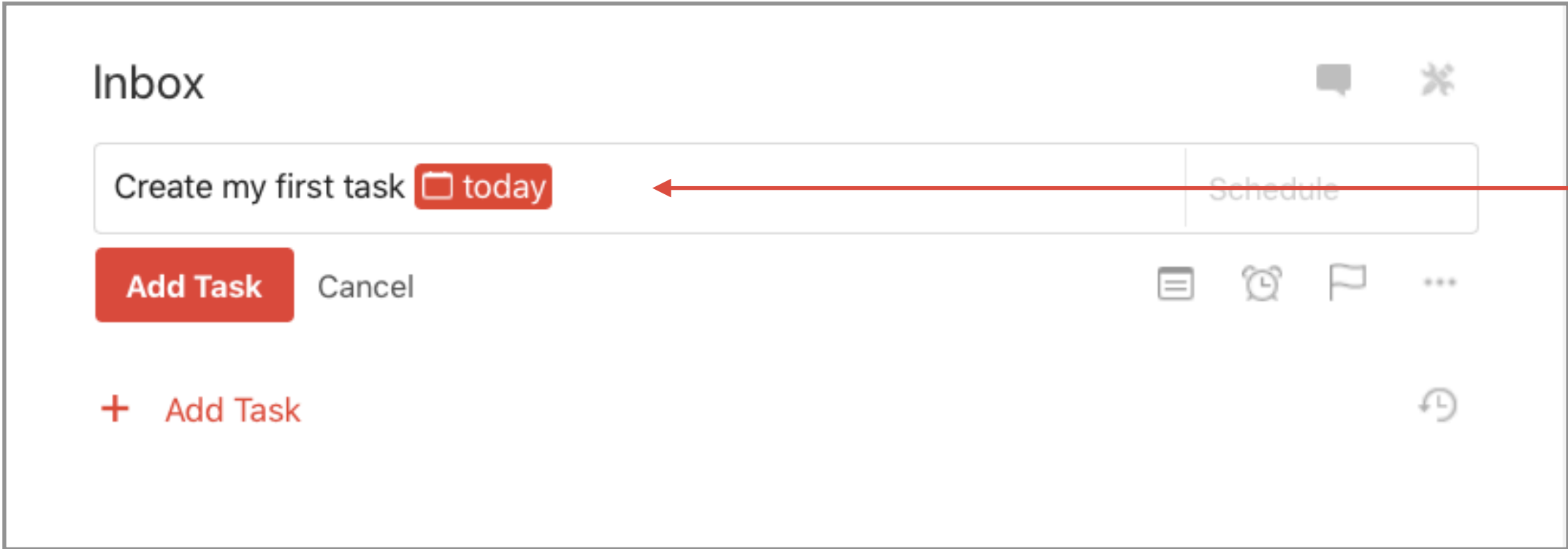
Click/tap the "+ Add Task" to create a task

This will open a text field where you can write your task (When you hit return or "Add Task" it will automatically open up a new create task box)

ADVANCED TIP: You can create a task by hitting "q" anywhere within the app.

Getting To Know Todoist

Adding due dates.

Inbox

Create my first task [ ] today   Schedule
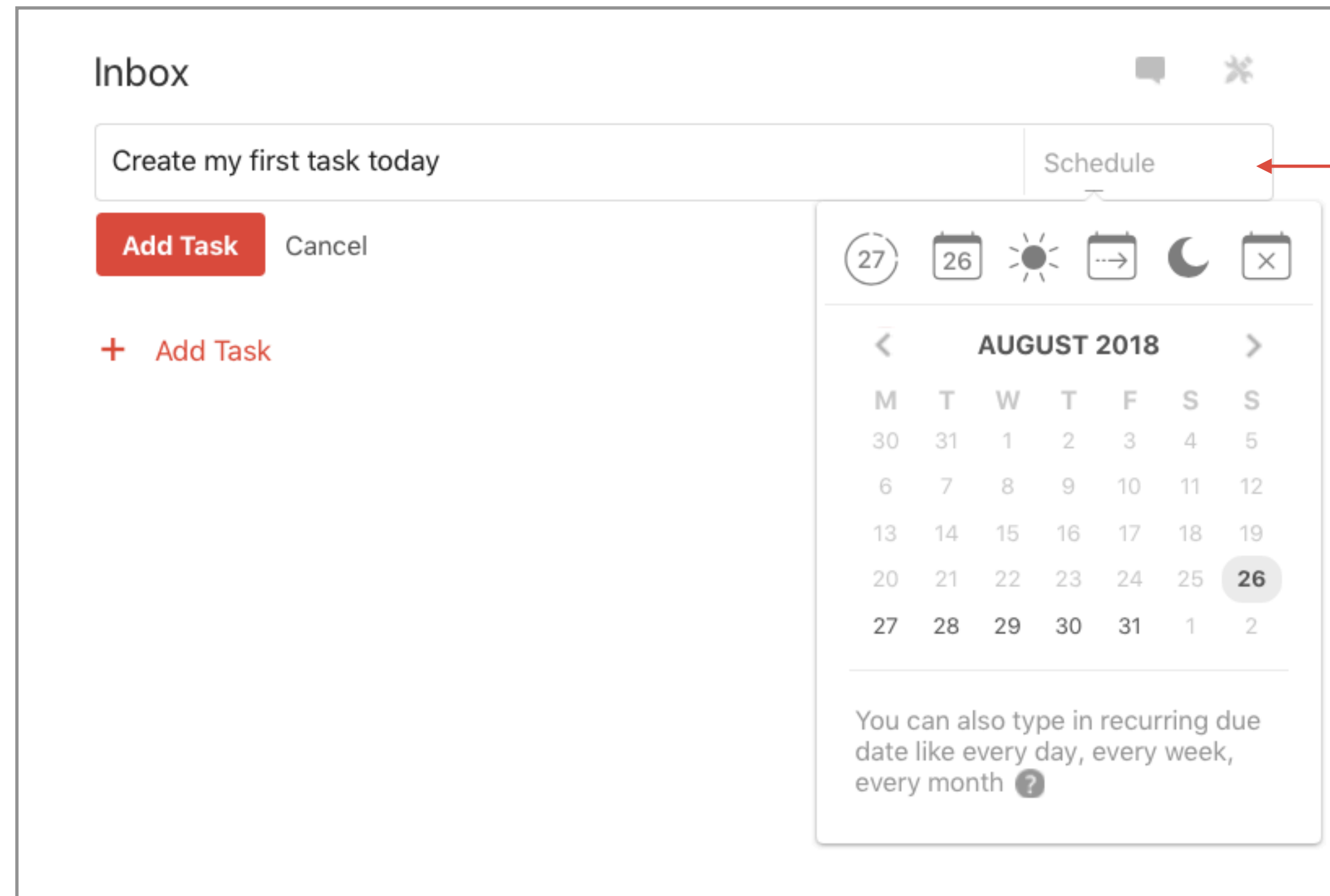
Add Task   Cancel

+ Add Task

When you type a date, Todoist will automatically recognise the date and highlight the date. If you do nothing, that date will be added to the task.

Inbox

Create my first task today   Schedule

Add Task   Cancel

+ Add Task

If you do not want the date to be added, just click on the highlighted date and it will be removed as a date.

Getting To Know Todoist

Adding due dates.

Inbox

Create my first task today   Schedule

Add Task   Cancel

+ Add Task

| | 27 | 26 | ☀ | →| | 🌙 | ✕ |

| < | **AUGUST 2018** | > |

M	T	W	T	F	S	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	**26**
27	28	29	30	31	1	2

You can also type in recurring due date like every day, every week, every month ?
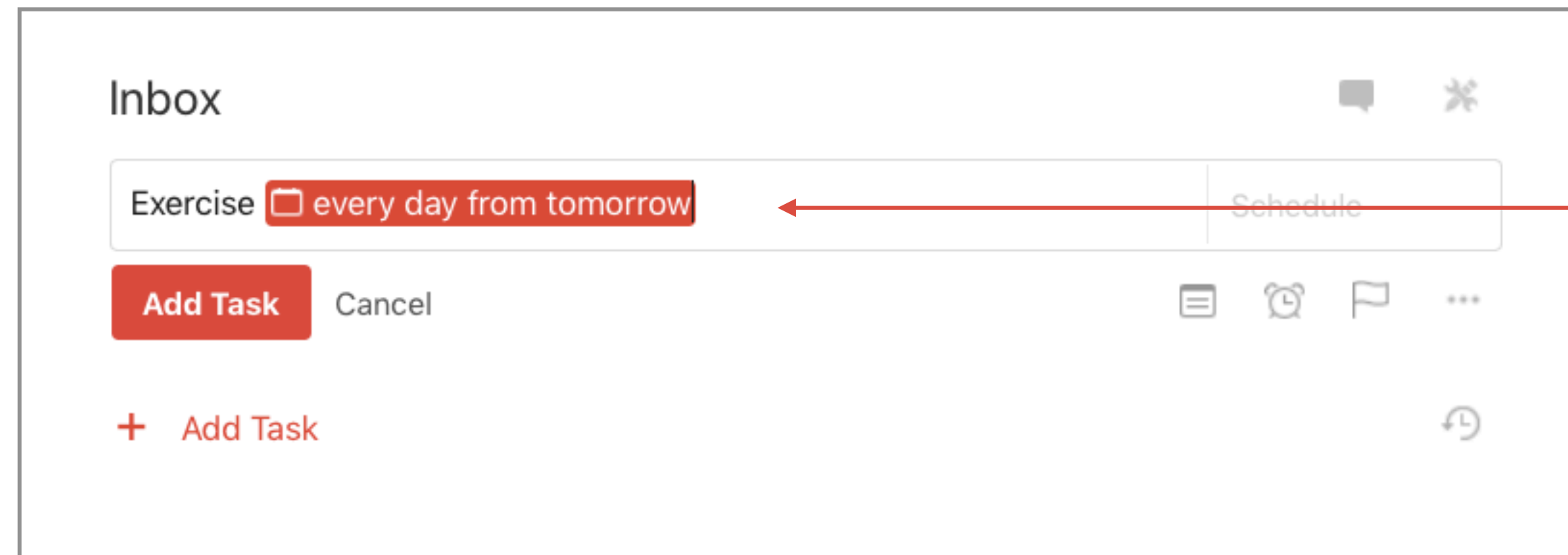
You can also tap the "schedule" field to select a date or just type the date directly in this field.

This will also bring up the date picker where you can select the date you want.

Getting To Know Todoist

Advanced dates

Inbox

Exercise **every day from tomorrow**   Schedule

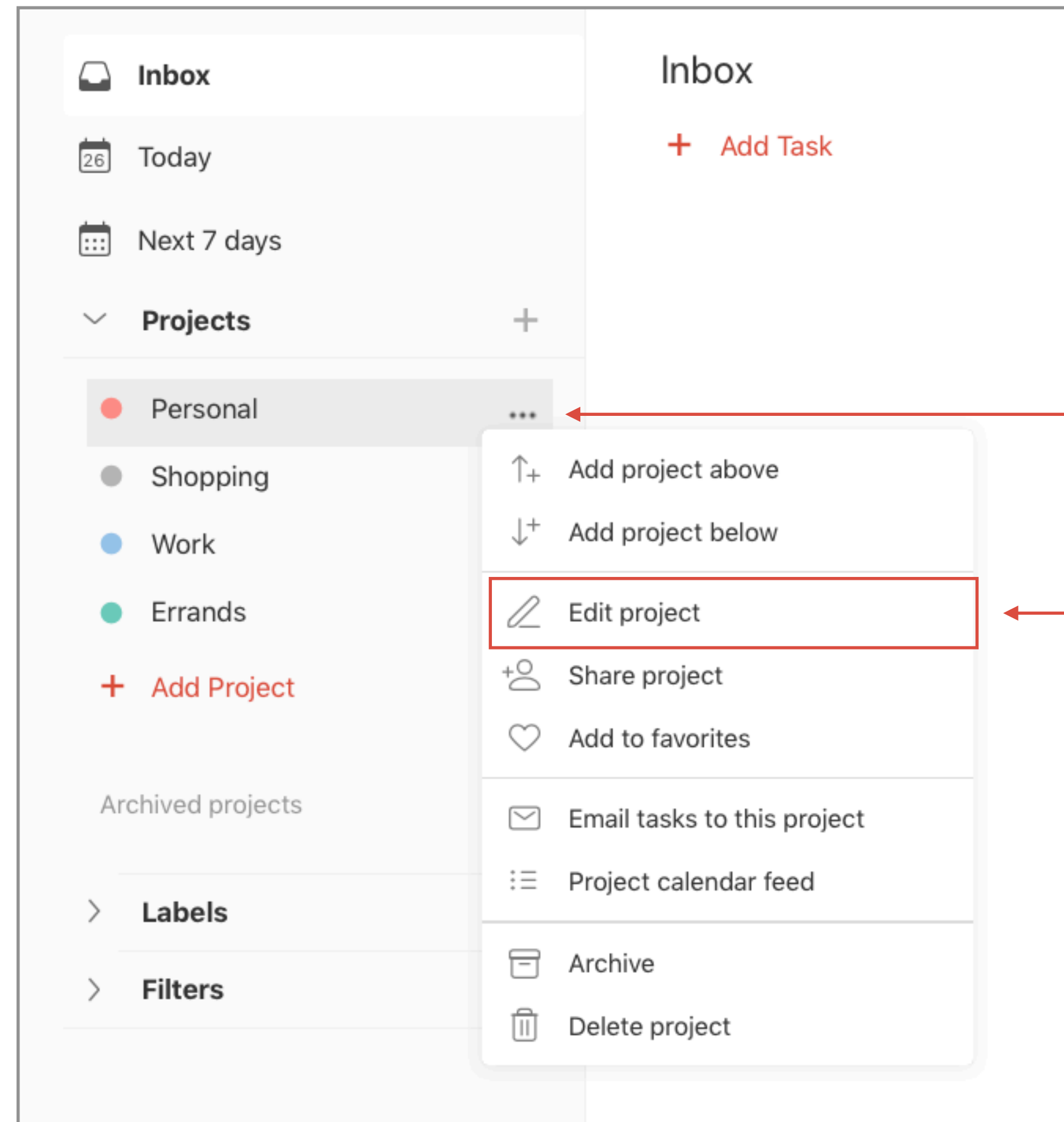**Add Task**   Cancel

+ Add Task

You can create recurring tasks using Todoist's natural date recognition technology. You can use phrases such as:

- "every Friday"
- "every second Monday"
- "Every two days"
- "Every 1" (means every 1st of the month - 1 September)
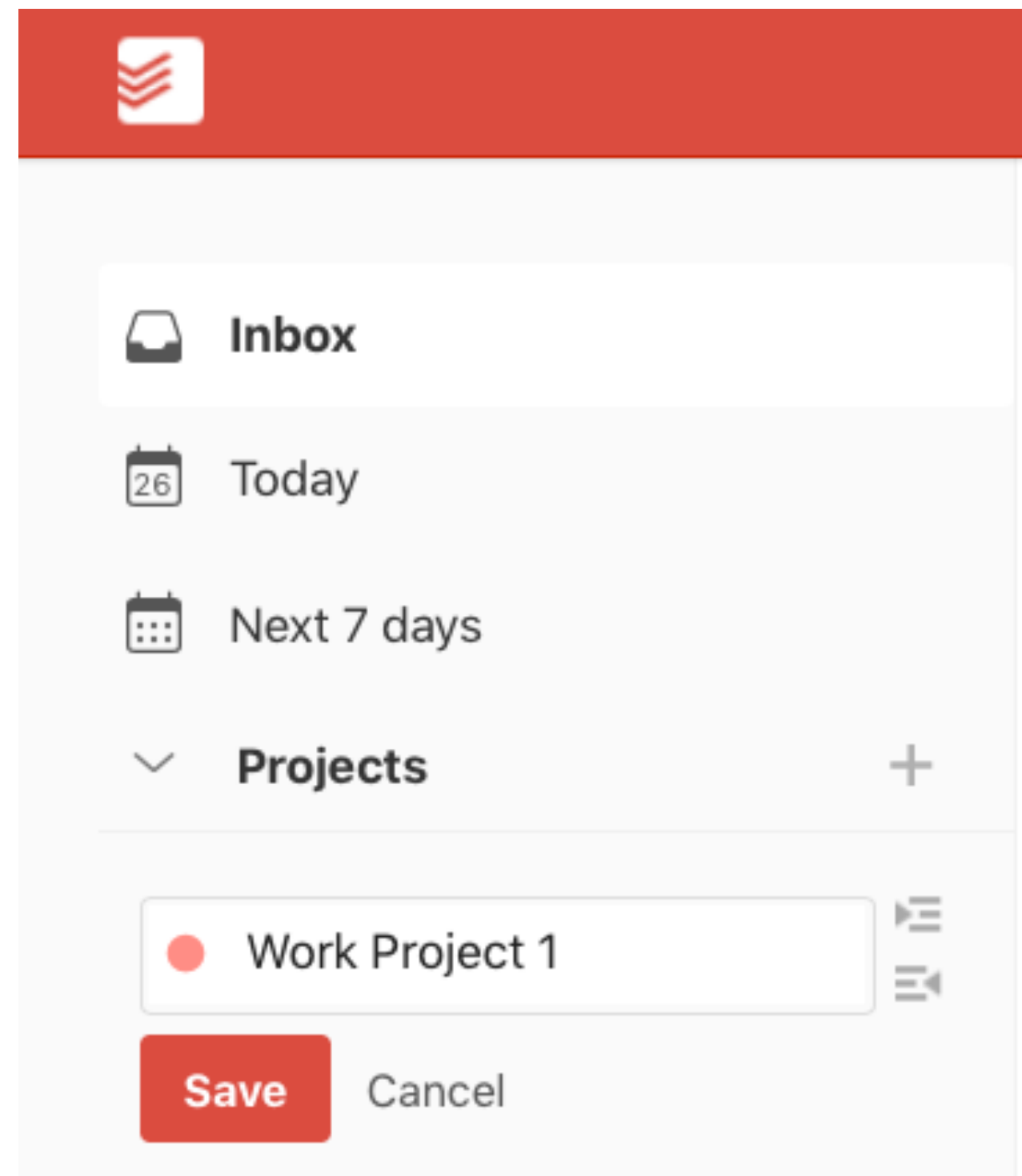
Creating Projects

Editing the project list

Click on the three dots at the side of the project.

From the drop-down menu select **"Edit project"**
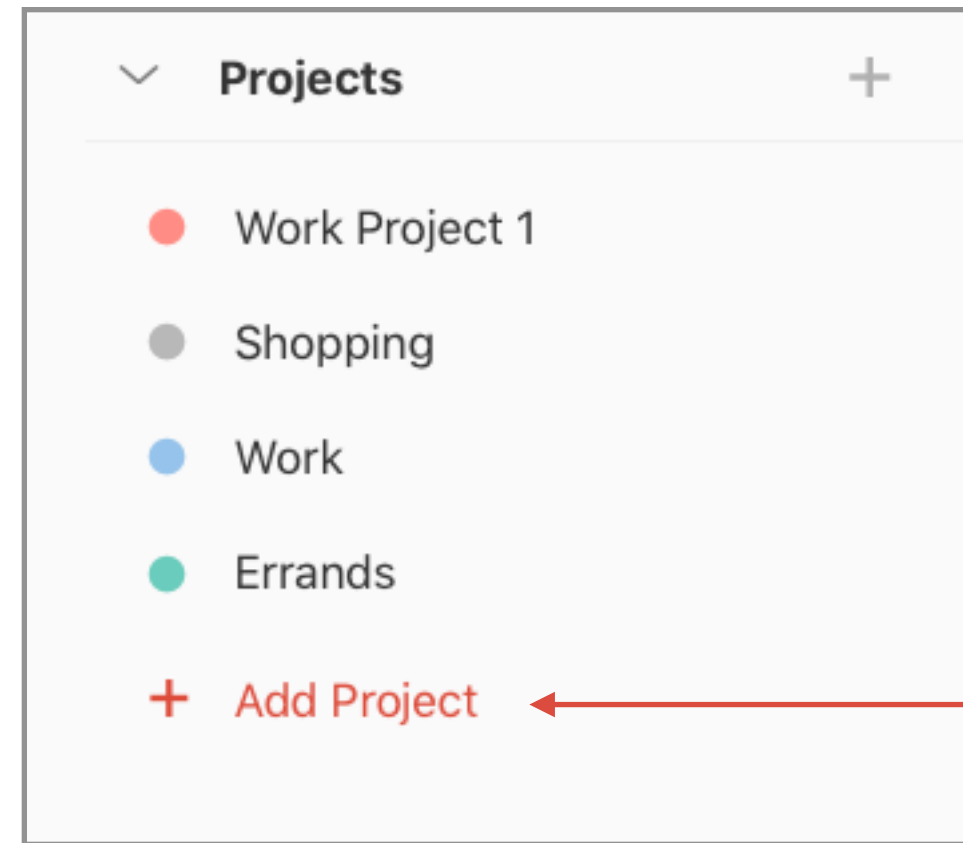
Creating Projects

Editing the project list
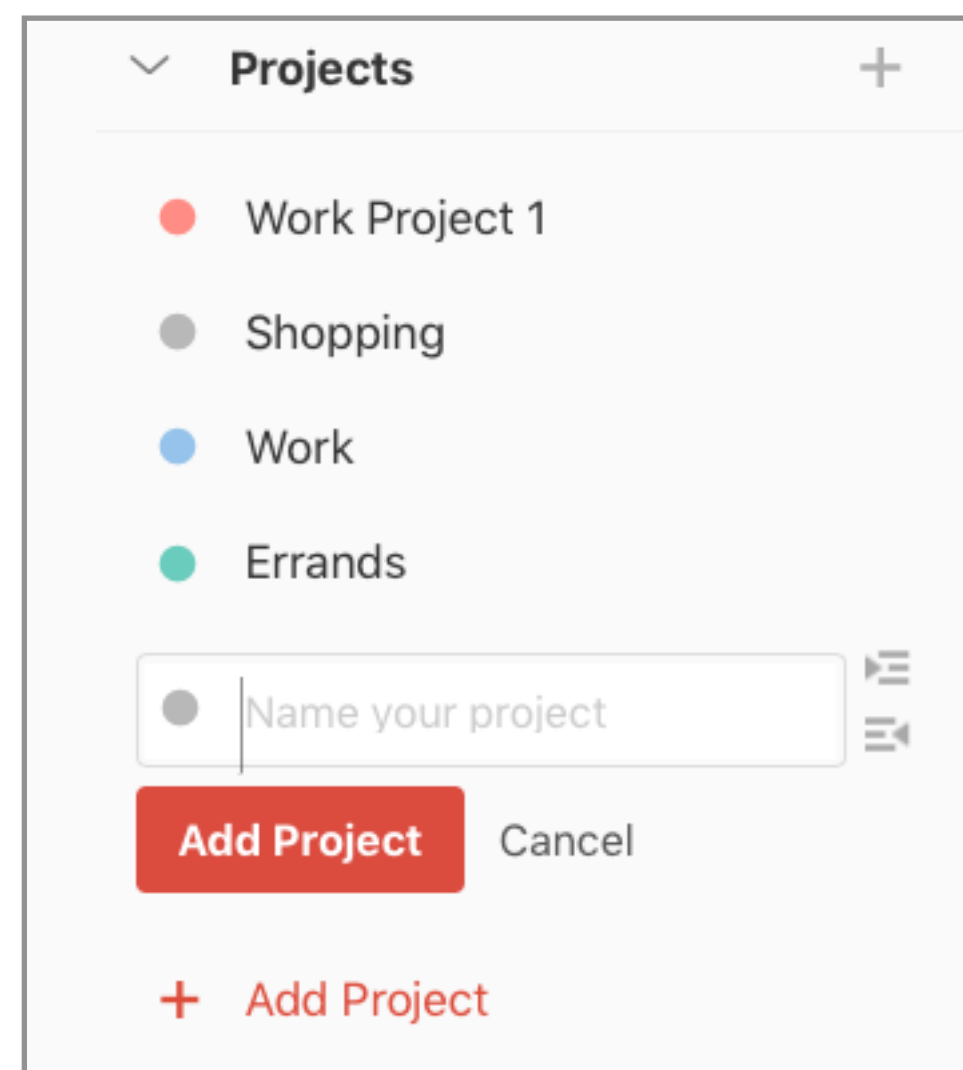

You can type in the name of your project right here

Clicking on the coloured dot will allow you to change the colour of the project.
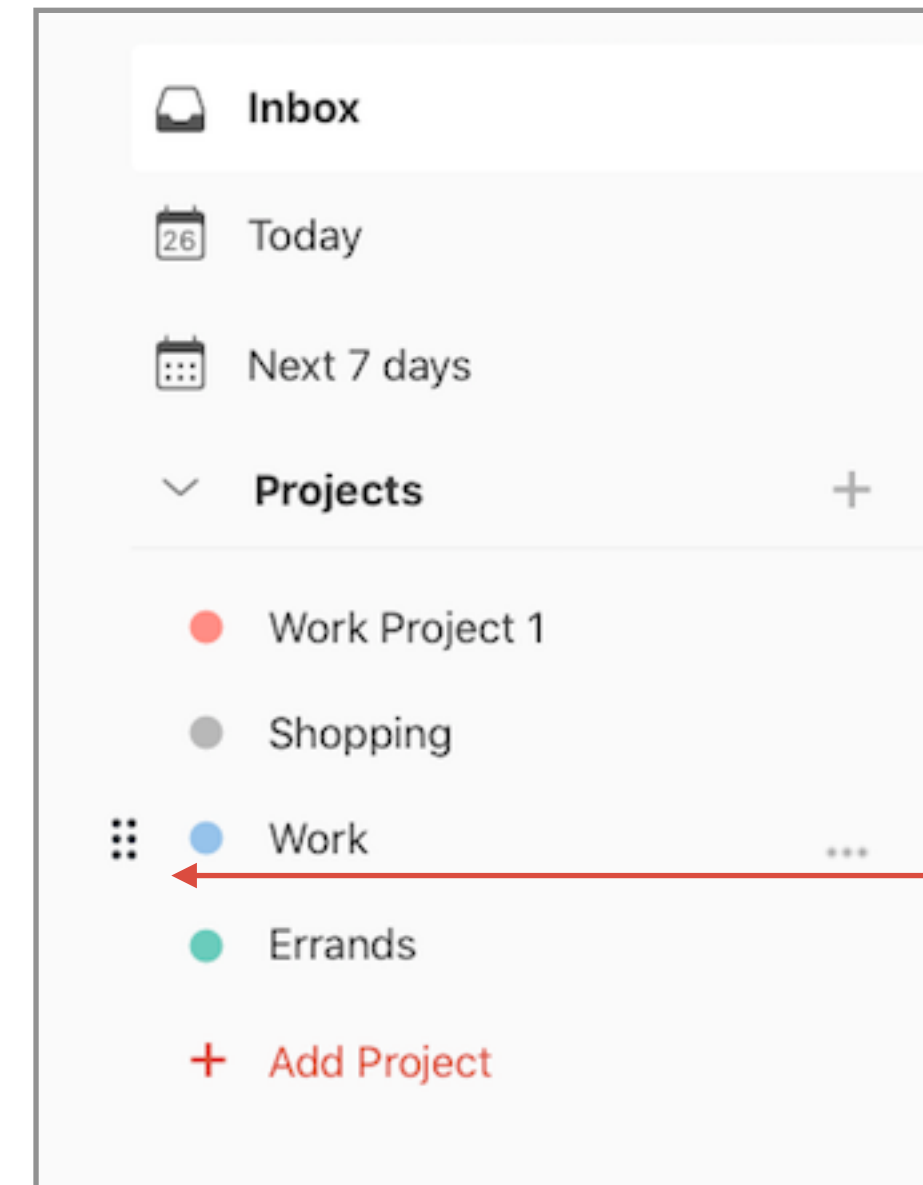
Creating Projects

Creating a new project.

Projects

- 🔴 Work Project 1
- ⚫ Shopping
- 🔵 Work
- 🟢 Errands
- **+ Add Project**

Click on the **+ Add Project**

Projects

- 🔴 Work Project 1
- ⚫ Shopping
- 🔵 Work
- 🟢 Errands
- ⚫ Name your project
- **Add Project** Cancel
- **+ Add Project**

You can now create your new project. Once done, click **Add Project**

Inbox

- 📥 Inbox
- 📅 Today
- 📅 Next 7 days

Projects

- 🔴 Work Project 1
- ⚫ Shopping
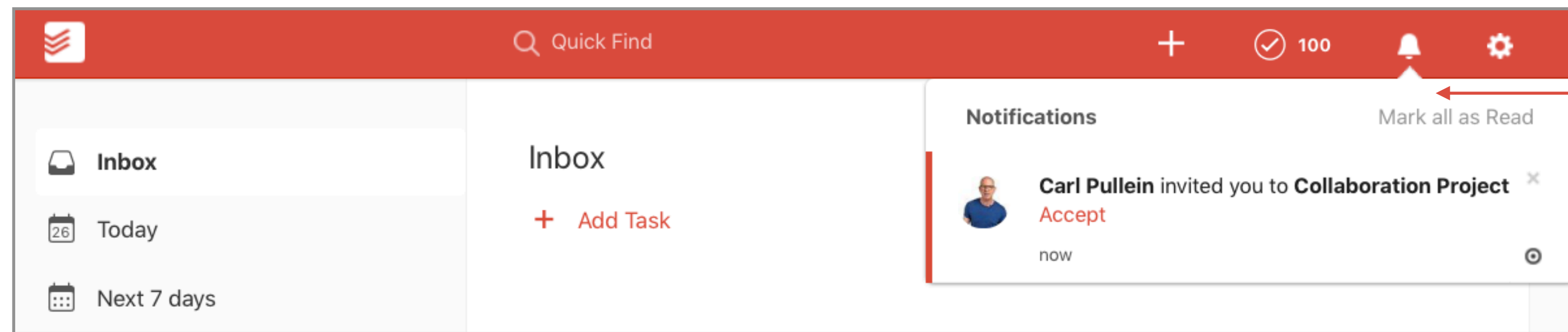- 🔵 Work ...
- 🟢 Errands
- **+ Add Project**

You can reorder you project list by moving your mouse over the project and grabbing the grab handle and dragging the project where you want it.
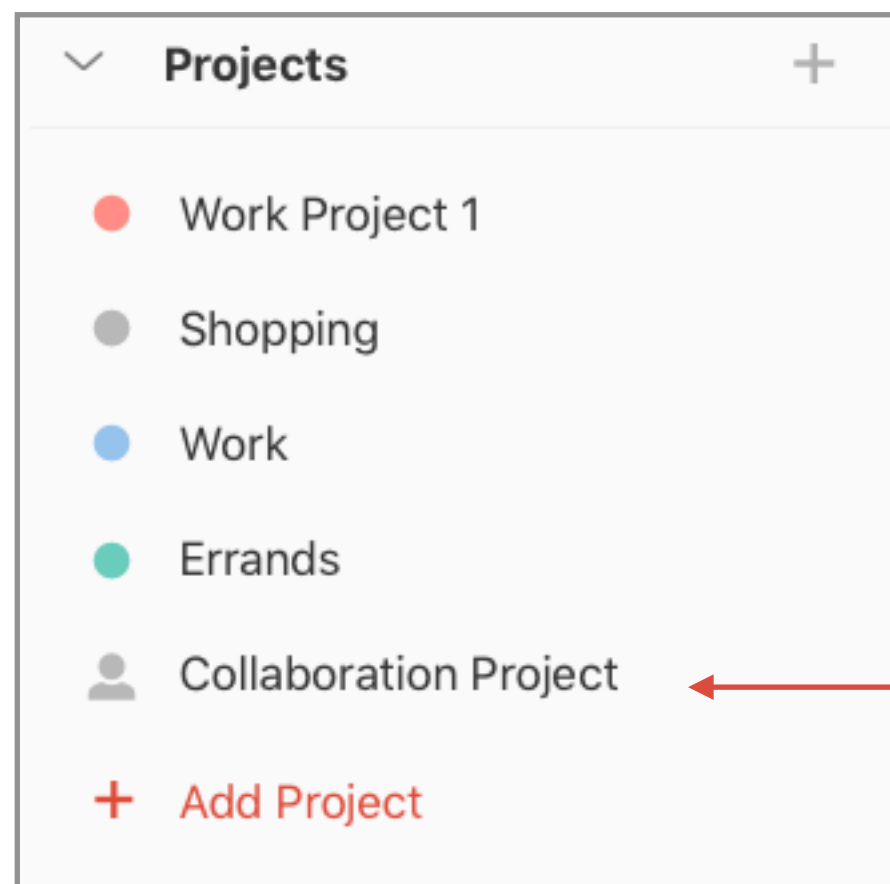
Step 2

Collaborating with others

Only those who have a premium/business Todoist account can share projects with others.
Those using the free version, will only be able to see projects/tasks assigned to them.
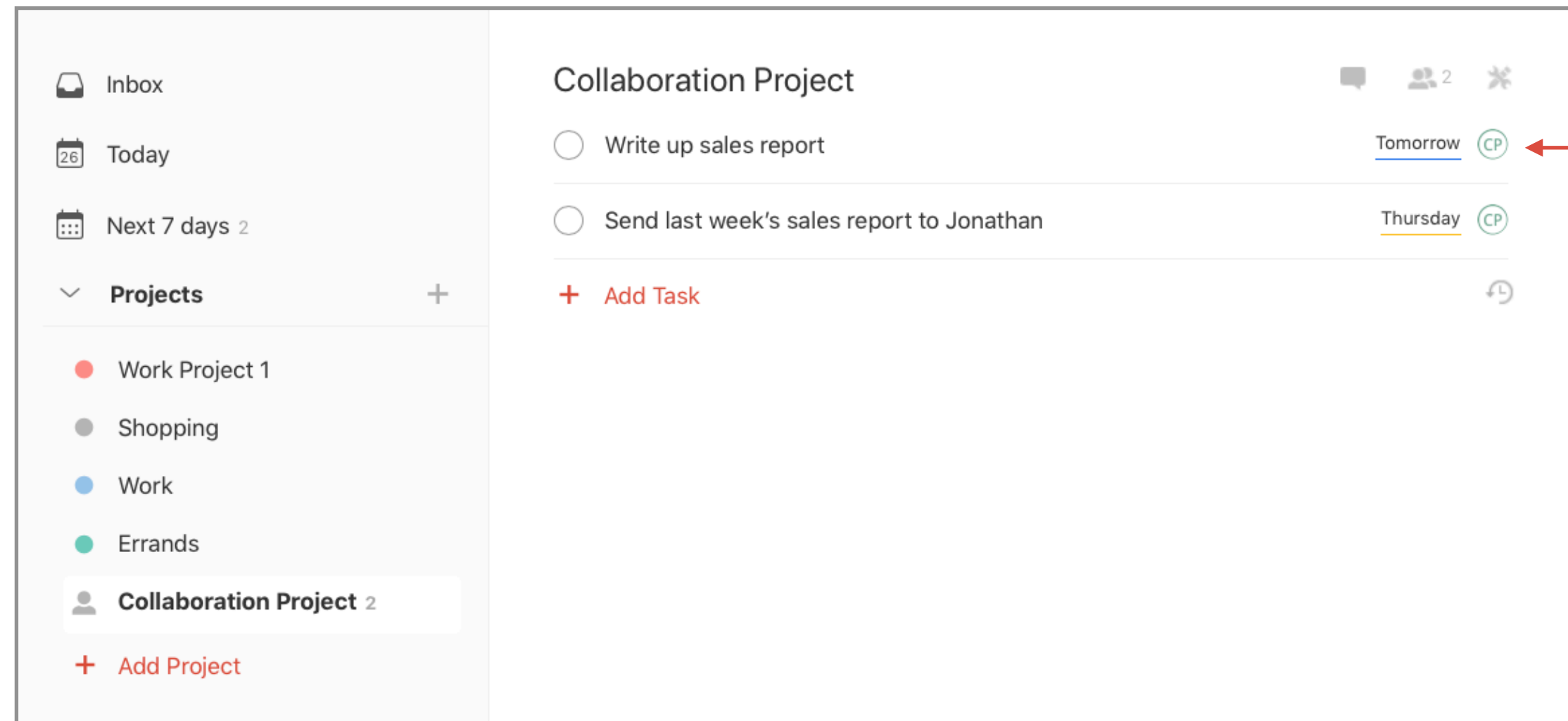

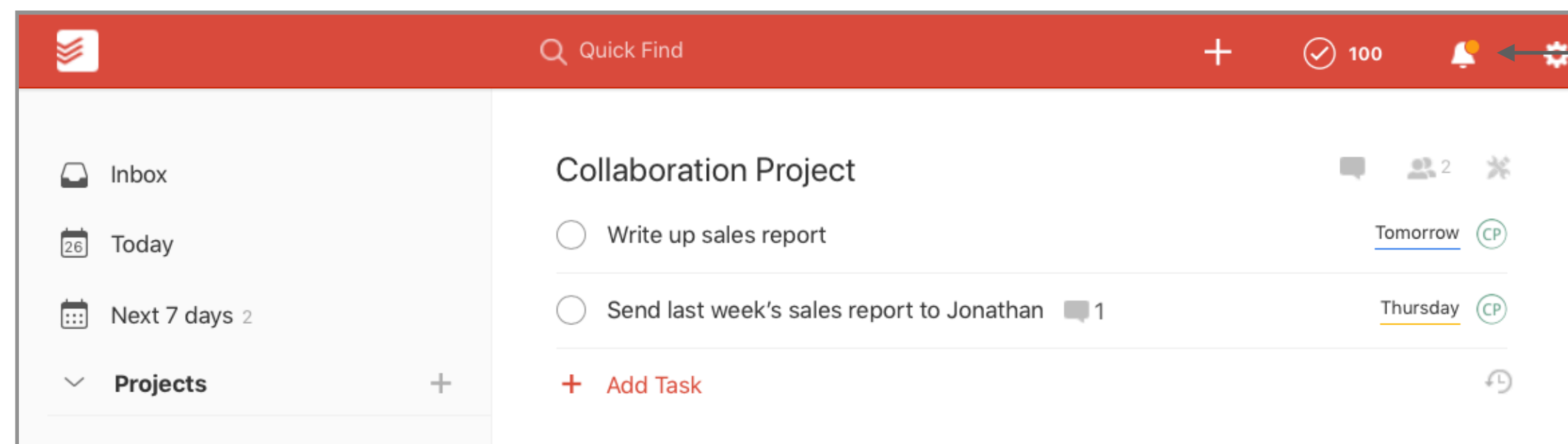When you are invited to a project you will get a notification. Click on the notification and choose **Accept**

Once accepted, the shared project will be added to your projects list
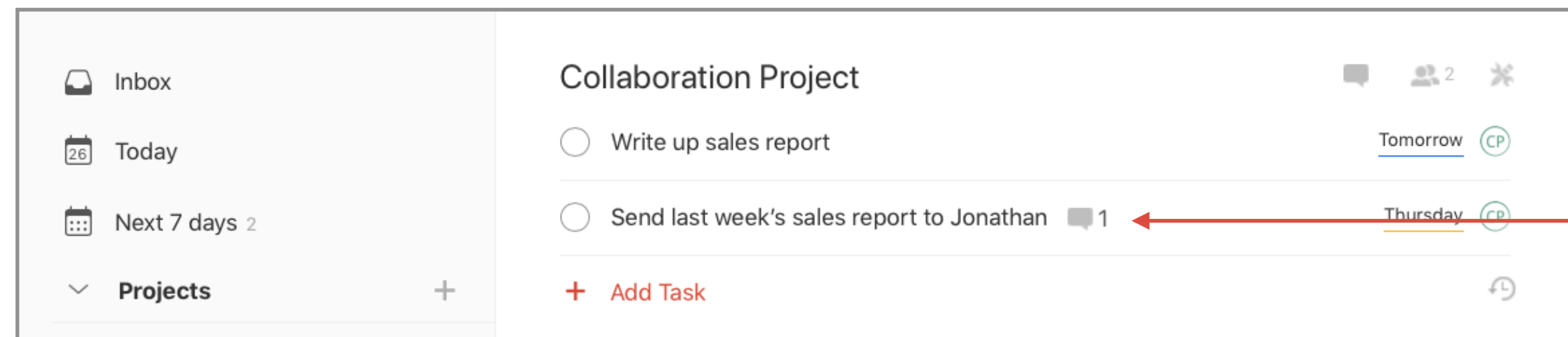
Step 2

Collaborating with others

Collaboration Project

- ○ Write up sales report — Tomorrow (CP)
- ○ Send last week's sales report to Jonathan — Thursday (CP)
- + Add Task

Inbox
Today
Next 7 days 2
Projects +
- Work Project 1
- Shopping
- Work
- Errands
- Collaboration Project 2
+ Add Project

When a task is assigned to you you will see your avatar/image/initials at the side of the task due date.

Quick Find + ✓ 100

Collaboration Project

- ○ Write up sales report — Tomorrow (CP)
- ○ Send last week's sales report to Jonathan 💬 1 — Thursday (CP)
- + Add Task

Inbox
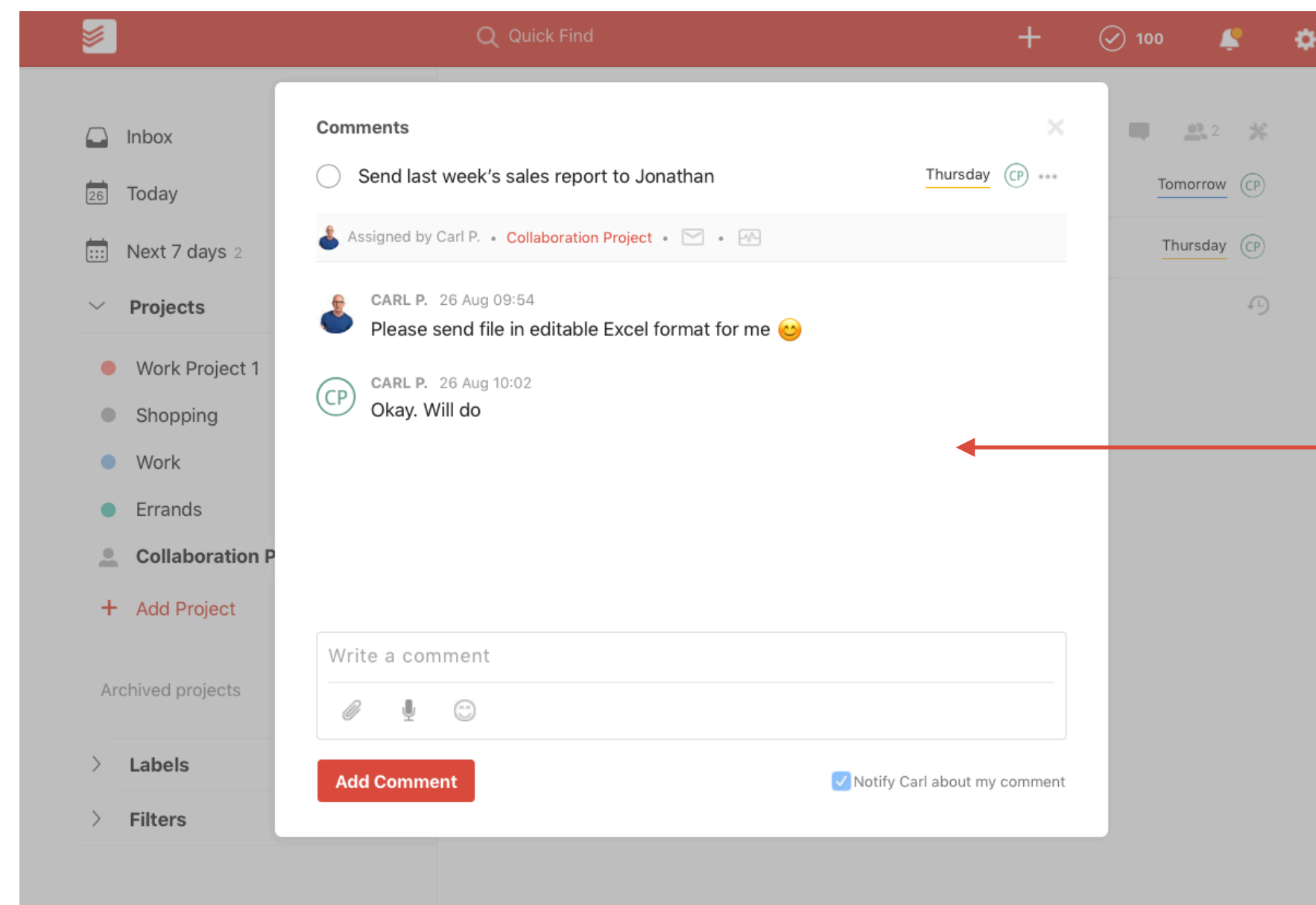Today
Next 7 days 2
Projects +

You will also see a little orange indicator to say you have a new task assigned to you.

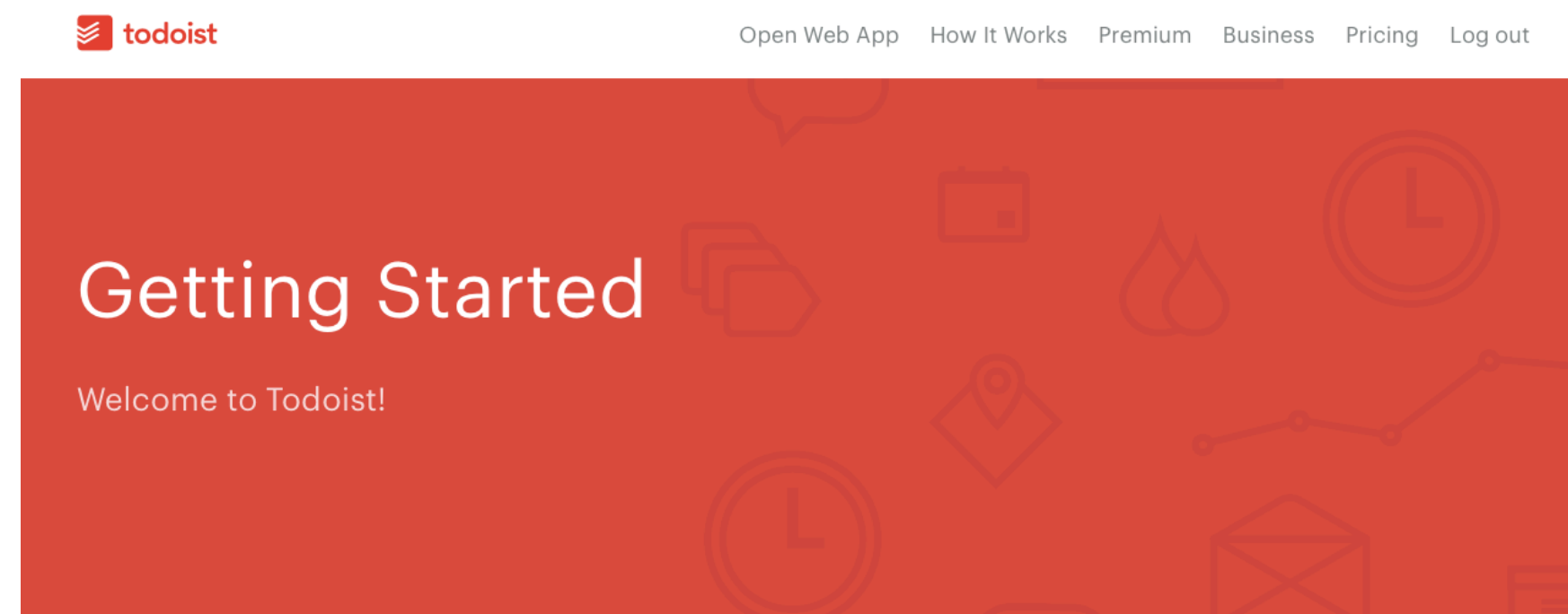# Step 2

Collaborating with others

If you see a speech bubble at the side of the task, this means there is a note attached to the task.

Clicking on the speech bubble will reveal the note.

You can respond to the note by writing in the comment section.

Further information and set up guides

Todoist's setup guide online.

A series of ten videos that take you through the setup step by step.

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