To: james | personal genius ███████████████████
From: ████████████
Sent: Mon 4/23/2018 8:44:43 PM
Subject: Your Contacts

When I was away ██████ emailed me stating you wanted her to have all of your contacts…Agree, We need to get all of your contacts in a place where others can access if you want them to. Will be a fairly big project. James has recommended the below solution…shall we proceed?

> On Apr 16, 2018, at 12:45 PM, james | personal genius
> ‹████████████████████› wrote:

The last time I worked with your contacts, they were at 19k, will need to clean up more
    I'm sure
I'll need to:
1. deduplicate the EXACT duplicates
2. selectively merge contacts that are the same person with incomplete info (email in one, phone in the other)
3. Flag conflicts e.g. same person with different numbers, different spellings of the same name, etc. for review.

Then

4. Export your contacts & import them into a new iCloud account I'll create specifically for this.
5. Remove any of your personal contacts that shouldn't be included — *I'll need you to flag those, maybe go through as soon as you can and add #personal to the notes?*
6. Add that new iCloud account as a secondary account on your devices & whoever else's devices Jeffrey deems appropriate.

From there, someone is going to get stuck cleaning up the contacts — fixing names/other info that are in the wrong fields, removing out of date info, etc. Tedious crap that will probably be most efficient if I can show someone how to do it and let them run with it.

Once complete, we should have 6-10k contacts that are accessible by everyone and auto populate when Jeffrey sends / receives emails & phone calls on his cell or iPad.

I recommend using iCloud for this since Apple's privacy policy is much better than others, and iCloud supports the full vCard format (meaning they don't screw up the formatting when you have a lot of phone numbers for folks).

Thank you,

James Ce
your Personal Genius
☐ Certified Support Professional 10.6
http://personalgenius.co