



SOHO NOTES™

USER'S GUIDE

CHRONOS LLC

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Chapter 1

Welcome to SOHO Notes

SOHO Notes is the premier digital note-taking application for Macintosh. It is designed for both individual and group use. Use it to capture, organize, and share all of your personal and workgroup information. This fourth generation note manager takes note management one step beyond its peers by letting you share notes over a network using its powerful client/server design. Plus, you can keep your personal notes synchronized between two or more computers using the built-in .Mac synchronization. SOHO Notes is bound to become one of the most used and useful pieces of software on your computer. For a list of new features in this version please visit our web site at <http://www.chronosnet.com>.

System Requirements

- Apple Macintosh G3 or higher
- Mac OS X v10.4.7 or later
- 60MB of available disk space
- CD-ROM drive

Upgrade Information

If you are currently running StickyBrain 3.x, SOHO Notes can easily convert your StickyBrain database for use with SOHO Notes. This section will describe this process and any issues related thereto. It assumes you already know how to use SOHO Notes. If you are currently running StickyBrain 4.x, SOHO Notes uses the same database as StickyBrain 4.x, so no conversion that is necessary.

To convert your StickyBrain 3.x notes to SOHO Notes:

Before you convert your notes, you should always make a backup of your database first. Follow the steps below to back up your StickyBrain 3 notes and convert them to SOHO Notes.

1. Launch StickyBrain 3. Note: you will not be able to launch StickyBrain 3 after installing SOHO Notes.
2. Choose File > Back up All Notes and save a backup of your notes to a safe location on your hard disk if you don't already have a backup.
3. Quit StickyBrain 3.
4. Install SOHO Notes. For more information see Chapter 3 *Installation* on page 8. Please note that when you install SOHO Notes, it will replace StickyBrain 3 on your computer which is why it's important to make a database backup first.
5. Launch SOHO Notes. The first time you launch SOHO Notes, it will automatically convert your StickyBrain 3.x database to the new format.

Learning to Use SOHO Notes

To learn how to use SOHO Notes, consult these resources:

User's Guide

This guide describes the SOHO Note's features and shows how to use the program.

Onscreen Help

Help tags are available for many of the items in the SOHO Notes window. To see the help tags, let the pointer rest over an item for a couple of seconds.

Technical Support

Chronos provides various support options for SOHO Notes. See <http://www.chronosnet.com/Support/index.html> for technical support options.

Web Resources

Go to <http://www.chronosnet.com/Products/index.html> to get the latest software and updates for SOHO Notes.

Chapter 2

SOHO Integration

SOHO Organizer and SOHO Notes are part of an integrated software series designed to help you focus on your business. While each product stands on its own and can be used independently of the other, they're crafted to work seamlessly together for unprecedented power and convenience. The purpose of this chapter is to introduce important concepts related to the integrated nature of these products.

A Single Database For Notes, Contacts, & Calendars

The SOHO series of products store their notes, contacts, and calendars in a single database. An integrated database offers several benefits:

- **Seamless Linking.** Notes, contacts, and calendars can seamlessly be linked to each other without complications.
- **Persistent Relationships.** Since notes, contacts, and calendars all exist in the same database, relationships between these objects cannot be broken accidentally or easily. When these objects are in separate databases, you must be careful to always keep the separate databases together since their contents are tightly related.
- **Portability.** Moving a database from one computer to another is easy since notes, contacts, calendars and their relationships are all stored in a single database file.
- **Simple Backups.** Backing up all your important information is easier because you only have one database to manage.
- **Easy Administration.** If you're operating in a multi-user environment, there's only one database to administer for notes, contacts, and calendars. This means a single list of user accounts to manage instead of three separate lists to keep synchronized. Plus, you can manage note, contact, and calendar access privileges from any SOHO Series product.

Single & Multi-User Enabled

SOHO Organizer and SOHO Notes are designed for both single and multi-user use out of the box without any additional software to purchase. This means the software is as equally suited for a user working individually at home as it is for a workgroup of twenty on an office network. The built-in dual use nature of these integrated products offers several benefits:

- **Simple Purchase Decision.** There aren't any complicated decisions to make since it's the same product for a single or multi-user environment. Simply purchase a single-user license for individual use or a volume license for multi-user use. Suppose, for example, your company has twenty users who wish to use SOHO Notes—simply purchase a 20-user pack.
- **Easy, Cost-Efficient Expansion.** You can start out using the SOHO series products for individual use and expand to multi-user use at any time without complicated conversions, etc. Simply purchase a volume license once you're ready. Licenses are additive so if you start out with a single user license and later buy a 5-user pack, you'll have licensing for a workgroup of six users.
- **Same Easy-To-Use Interface.** Since the same software is used for both single and multi-user use, you'll use the same easy-to-use interface for both. This means expanding from a single-user environment to a multi-user environment the experience will be the same and familiar.
- **Flexible Configurations.** You can mix and match licensing between SOHO series products to meet your needs. For example, you can have five SOHO Notes users and thirty SOHO Organizer users accessing the same shared database. Further, the five SOHO Notes users don't necessarily have to be part of the group of thirty SOHO Organizer users. Such flexibility lets you decide the needs of your business and purchase accordingly instead of forcing you to purchase products you don't need. Of course, the best idea is to purchase

the complete SOHO series for all your users so they all have access to best tools!

Chapter 3

Installation

This chapter will discuss the steps required to install SOHO Notes in either a single or multi-user environment. The single user installation is intended for users who will be installing the product for personal use. The multi-user installation is intended for workgroups that wish to share information with multiple users over a network while still providing personal use for each user. This chapter will also discuss what gets installed and how to uninstall the product.

Installation (Single User)

The single user installation is intended for those users who wish to install the product for personal use.

To install SOHO Notes for a single user from a disc:

1. Insert the SOHO Notes disc into your computer's optical drive and double-click the installer icon.

To install SOHO Notes for a single user from a download:

1. Open the SOHO Notes disk image on your desktop and double-click the installer icon.

For a list of items that get installed on the hard disk see *What Gets Installed?* on page 8.

Installation (Multi-User)

The multi-user installation is intended for workgroups who wish to share information with multiple users over a network while still providing personal use for each user. The multi-user installation involves installing SOHO Notes on both a server computer and each client computer. The same installer is used for both the server and client computers.

Note: the server should be a computer on the network that is accessible by all the users who will be accessing it. The server computer can be any computer whether it's a dedicated server or the administrator's personal machine. It's also a good idea to choose a server whose network address is static and won't be changing.

To install SOHO Notes on a server and each client machine from a disc:

1. Insert the SOHO Notes disc into your computer's optical drive and double-click the installer. Repeat this step on the server computer and each client computer.

To install SOHO Notes on a server and each client machine from a download:

1. Open the SOHO Notes disk image and double-click the installer. Repeat this step on the server computer and each client computer.

Once you have installed SOHO Notes on the server and client machines, you will need to set up SOHO Notes for network access, see *Get Started (Multi-user Environment)* in Chapter *Get Started (Multi-user Environment)* on page 12 for more information. For a list of items that get installed on the hard disk see *What Gets Installed?* on page 8.

What Gets Installed?

The SOHO Notes installer will install the following items on to your hard disk (“-” denotes your home folder).

- **SOHO Notes.** This is the main application. The SOHO Notes application will be installed into a folder named “SOHO Series” which will be installed in your main Applications folder: /Applications/SOHO Se-

ries

- **Chronos/SOHO Notes.** This folder stores pictures, textures, and other related files and is installed into the “Application Support” folder of your home Library folder: `~/Library/Application Support/Chronos/SOHO Notes/`
- **SOHO Sync.** This is a helper application for SOHO Notes. The SOHO Sync application is installed into the “Helper Applications” folder of the “Chronos” folder: `~/Library/Application Support/Chronos/Helper Applications/`
- **ChronosNotesCM.plugin.** This is the SOHO Notes contextual menu plugin file and it is installed into the “Contextual Menu Items” folder of the “Application Support” folder of your home Library folder: `~/Library/Contextual Menu Items/ChronosNotesCM.plugin`
- **ChronosNotesService.** This is a helper application for SOHO Notes. The ChronosNotesService application is installed into the “Services” folder of your home Library folder: `~/Library/Services/ChronosNotesService`
- **ChronosNotesConduit.** This is the conduit that synchronizes notes between SOHO Notes and a Palm handheld. The ChronosNotesConduit is installed in the Conduits folder: `/Library/Application Support/Palm HotSync/Conduits`
- **ChronosNotes.wdgt.** This is the SOHO Notes widget. The widget is installed into the “Widgets” folder of your home Library folder: `~/Library/Widgets/ChronosNotes.wdgt`
- **OpenBase.** This is the database engine SOHO Notes uses to store your information. The installer places files in several locations:
 - `/Library/OpenBase`
 - `/Library/StartupItems/OpenBase`
 - `/Library/Frameworks/OpenBase...framework`
 - `/Library/Java/Extensions/OpenBaseJDBC.jar`
 - `/Applications/OpenBase`

Uninstall

SOHO Notes and its related files can be uninstalled two different ways: manually or via the installer.

To uninstall SOHO Notes via the installer:

1. Double-click the installer.
2. Choose Uninstall from the “Easy Install” pop-up menu.
3. Follow the on-screen prompts.

To uninstall SOHO Notes manually:

The below steps describe how to uninstall of the components related to SOHO Notes except for the OpenBase components. Caution must be taken when uninstalling the software since StickyBrain, SOHO Notes, and SOHO Organizer share certain installed components as noted. Note: the OpenBase components can only be uninstalled using the uninstall option in the SOHO Notes installer.

1. Delete the “SOHO Notes” application from the “SOHO Series” folder. This is located in the “Applications” folder. If you are not using any other SOHO products from Chronos, delete the “SOHO Series” folder.
2. Delete the “Chronos/SOHO Notes” folder. This is located in the “Application Support” folder of your home Library folder.
3. Delete the “ChronosNotesCM.plugin” from the Contextual Menu Items folder of your home Library folder. Do not delete this file if you’ll still be using StickyBrain or SOHO Notes.
4. Delete the “ChronosNotes.wdgt” from the Widgets folder of your home Library folder. Do not delete this file if you’ll still be using StickyBrain or SOHO Notes.
5. Delete the “ChronosNotesService” from the Services folder of your home Library folder. Do not delete this file if you’ll still be using StickyBrain or SOHO Notes.

6. Delete the “ChronosNotesConduit” file. This is located in the directory: /Library/Application Support/Palm HotSync/Conduits/. Do not delete this file if you’ll still be using StickyBrain or SOHO Notes.
7. Delete the “SOHO Sync” from the “Helper Applications” folder of the “Chronos” folder: ~/Library/Application Support/Chronos/Helper Applications/. Do not delete this file if you’ll still be using SOHO Organizer or SOHO Notes.
8. Delete the “com.chronos.SOHOOrganizer.plist” file. This file is located in the “Preferences” folder of your home Library folder.
9. Delete the “com.chronos.SOHONotes.plist” file. This file is located in the “Preferences” folder of your home Library folder.
10. Delete the “com.chronos.ChronosNotesService.plist” file. This file is located in the “Preferences” folder of your home Library folder.
11. Delete the “ChronosNotesService.bundle” file. This file is located in the “Services” folder of your home Library folder.

Chapter 4

Get Started (Single-user Environment)

The purpose of this chapter is to show you how to get started with SOHO Organizer or SOHO Notes in a single-user environment.

Personal Database

Each user always has a “personal” database on his/her machine in which his/her personal notes, contacts, and calendars are stored. The personal database is automatically created the first time SOHO Organizer or SOHO Notes is launched. This database is called “Chronos_username.db” and is always stored on the user’s local hard disk. Information in a personal database cannot be shared with others.

Under no circumstances should the personal database be moved, copied, renamed, double-clicked, or otherwise altered. For this reason SOHO Notes includes a backup mechanism that properly makes a backup of the database. The personal database for SOHO Notes is stored in the following directory:

/Library/OpenBase/Databases/Chronos_username.db

Get Started

To start working with contacts and calendars:

1. Launch SOHO Organizer. SOHO Organizer will automatically synchronize with the Mac OS X Address Book and iCal and your calendar and contact information will start appearing in SOHO Organizer. This may take anywhere from a few seconds to a few minutes depending upon how many calendar and contact information you have.

To start working with notes:

1. Launch SOHO Notes. A collection of default folders in your personal database will appear in the folders region. You can add notes to these folders or create your own folders.

To print business documents:

1. Launch SOHO Print Essentials.
2. OR Launch SOHO Organizer and choose File > Print > Labels, Envelopes, Fax Covers, etc. to print the documents of your choice for the currently selected contacts.

Chapter 5

Get Started (Multi-user Environment)

The purpose of this chapter is to show you how to set up SOHO Organizer or SOHO Notes in a multi-user environment. This chapter is intended for both administrators and end users. It's important to remember that each of these applications can store their information in the same database. In other words, a database can contain notes, calendars, and contacts. This allows for seamless integration between these products and a great user experience for your workgroup. For example, notes linked to a contact will appear in both SOHO Organizer and SOHO Notes. Although these applications are integrated, they can still be used on their own independent of one another.

The setup for each of these applications in a network environment is the same. This chapter will therefore describe the setup process for each product. Plus, there's a good chance that if you're setting up one SOHO series product, you might be setting up the others as well.

SOHO Organizer and SOHO Notes are multi-user applications which means a few things:

- Note, calendar, and contact information can be stored for more than one user in a single database.
- Multiple users can access the same database simultaneously.
- Multiple databases can be created on a shared computer.
- Access privileges can be applied to restrict access to notes, calendars, and contacts on a per user basis.

Personal Database Versus Shared Databases

Each user always has a "personal" database on his/her machine in which his/her personal notes, contacts, and calendars are stored. The personal database is automatically created the first time SOHO Organizer or SOHO Notes is launched. This database is called "Chronos_username.db" and is always stored on the user's local hard disk. Information in a personal database cannot be shared with others.

Under no circumstances should the personal database be moved, copied, renamed, double-clicked, or otherwise altered. For this reason SOHO Notes includes a backup mechanism that properly makes a backup of the database. The personal database for SOHO Notes is stored in the following directory:

/Library/OpenBase/Databases/Chronos_username.db

A "shared" database, on the other hand, is created by an administrator on a shared server. The server should be a computer on the network that is accessible by all the users who will be accessing it. The server computer can be any computer whether it's a dedicated server or the administrator's personal machine. It's also a good idea to choose a server whose network address is static and won't be changing.

Set up Your Server (Administrators)

This section will discuss the steps, you the administrator, will need to perform to set up network access for a SOHO series product. This section assumes you have already installed the SOHO software on the server and each of the clients. We highly suggest you read the entire section before getting started. This will help you to understand the setup process a little better.

Develop a Game Plan

Setting up SOHO Notes in multi-user environment is straightforward and simple. A little pre-thinking and planning will, however, make the task even easier and less time-consuming. Below are some questions that will help you gain insight into the needs of your organization. Your answers will form the basis of your game plan

and will be used in future installation and setup steps.

- List all the people including yourself who will be using SOHO Notes. You will be creating a user account for each of these individuals.
- Which computer will be used as the designated server?
- If you're setting up SOHO Notes, make a list of folders you will want users to store shared notes in. For example, you might create a folder for each department in your organization with sub-folders for projects each department is working on.
 - Next to each folder, list each user who will need access to it. For example, you might want John, Susan, and Jennifer to have access to the Marketing Department folder.
 - Next to each user name, indicate whether you want the user to have read, write, or read & write access to the notes in the folder. For example, you might give John read-only access to the folder while Susan and Jennifer have full read/write access.
- If you're setting up SOHO Organizer, write down which users you want to have read and read/write access to the contacts in the database.
- If you're setting up SOHO Organizer, make a list of calendars you will want users to store events and to-dos in. For example, you might create calendars for each department in your organization.
 - Next to each calendar, list each user who will need access to it. For example, you might want only John and Jennifer to have access to the Marketing Department calendar.
 - Next to each user name, indicate whether you want the user to have read, write, or read & write access to the calendar. For example, you might give John read-only access to the folder while Jennifer has full read/write access.

The following is an example game plan:

User Accounts: Sam, Jennifer, Mark, John

Server Computer: G5 Server (192.168.0.1)

Note Folders: Marketing (John—read, Susan—read/write, Jennifer—read/write); Human Resources (Sam—read/write, Mark—read/write)

Contact Privileges: Sam—read, Jennifer—read/write, Mark—none, John—read

Calendar Privileges: Marketing (John—read, Jennifer—read/write); Human Resources (Sam—read/write, Mark—read/write)

Configure Server Software

The SOHO series products use a commercial database system called OpenBase to store information in. OpenBase is automatically installed on both the client and server computers as part of the installation process. In order for users to access a shared database on a server, you will need to configure OpenBase on the server to allow network access. You don't need to do this on the client computers since they won't be accepting external access. If you have firewall software running on the server computer, you will need to open up certain ports for OpenBase.

To configure OpenBase for network access:

You configure OpenBase using the OpenBase Manager application which is automatically installed for you.

1. Move to your server computer.
2. Launch the OpenBase Manager application located at /Applications/OpenBase/
3. Choose OpenBaseManager > Local Host Settings.
4. Enable Network Access Allowed. This will allow client machines to connect to shared databases on the server computer.
5. OPTIONAL. Click the Read Password Not Secure button to set a read password. If a Read password is set, only authorized users may connect to shared databases on the server computer.
6. OPTIONAL. Click the Host Password Not Secure button to set a host password. If a Host password is set,

only authorized users may create and delete shared databases on the server computer.

If you need to remove the Read or Host password, click the Read Password Secured or Host Password Secured button and leave Password and Verify fields blank and click the Continue button.

To open TCP ports in the firewall on the server computer:

If you have firewall software running on the server computer, you will need to open up certain TCP ports in the firewall to allow client computers to access the shared database on the server computer. This only needs to be done on the server, not the client computer. Open the following TCP ports in your firewall software on the server:

- 20221 and 20222. OpenBase uses these TCP ports for getting the information needed to connect to OpenBase databases by name.
- 20223 through 20300. OpenBase uses this range of TCP ports for database ports. Each database will run on its own port.

Please consult the help resources of your firewall software for information on opening and closing TCP ports. As an example, the following steps will show you how to open TCP ports in Mac OS X's built-in firewall:

1. Choose Apple menu > System Preferences, and click the Sharing button.
2. Click the Firewall tab.
3. Click New.
4. Choose Other from the Port Name pop-up menu.
5. Type 20221, 20222, 20223-20300 in the TCP Port Number(s) field.
6. Leave the UDP Port Number(s) field blank.
7. Type OpenBase in the Description field.
8. Click OK.

Set up Shared Databases (Administrators)

This section will describe how to create and configure shared databases. It assumes you have a game plan in place as discussed in the previous section.

Database Manager

The Database Manager is where you will create and delete shared databases, set up user accounts, and assign access privileges. The following sections will discuss each of these tasks in detail. This section will show you how to access the Database Manager for administrators.

To access the Database Manager for administrators:

1. Launch SOHO Notes.
2. Choose File > Manage Databases. The Database Manager window will appear.
3. Click the Administrator button to see the administrator options.

Create/Delete Shared Databases

This section will show you how to create and delete shared databases on the server. You do not need to be at the server computer in order to do this. You can do this from any client computer.

To create a shared database:

1. Choose File > Manage Databases and click Administrator.

2. Select New Database from the Database pop-up menu. The New Database window will appear.



3. Enter the server address of the computer that you want the database to be created on. The server address can be in the form of 192.168.0.1, <http://www.chronosnet.com>, or some-name-power-mac-g5.local. Use the server name “localhost” or “127.0.0.1” if you want to create the database on the computer you’re sitting at.
4. Enter a database name of your choosing.
5. Enter the name for the admin account. The admin account will be the account that is used to administer the database. Since you’re the admin, you can use your own name or other name of your choosing. There can only be one admin account.
6. Enter a password for the admin account. You **MUST** remember this password. If you forget this password, you will not be able to reset it. A fee-based password recovery service is the only way to recover your password if you lose it. Visit <http://www.chronosnet.com/Support/> for more information.
7. Re-confirm the password you typed in the previous step.
8. Click Create to create the database.

The database will be created on the server computer you specified. The database will be listed in the Database pop-up menu so you can add user accounts and assign access privileges.

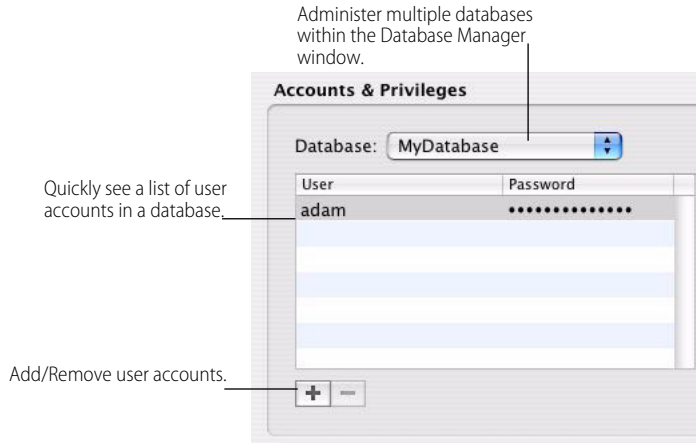
To delete a database:

1. Choose File > Manage Databases and click Administrator.
2. Select the database you wish to delete from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Select Delete Selected Database from the Database pop-up menu. You’ll be asked to confirm the delete since deleting a database is a permanent operation and cannot be undone.

Set up User Accounts

A user account will need to be set up for each individual that is going to access a shared database. A user account

consists of a user name and password.



To add a user account:

1. Choose File > Manage Databases and click Administrator.
2. Select a database from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Click Add (+). A new user account will be created in the selected database.
4. Type in a user name and password for the user account. Each individual user will be able to change their password later, so you may want to use a temporary password when you first create a user account.

Repeat these steps for each user account you need to create.

To edit a user account:

If a user forgets his/her user name or password, you can reset it for them by editing their user account.

1. Choose File > Manage Databases and click Administrator.
2. Select a database from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Double-click the user name or password you wish to edit in the user list.
4. Type in a new user name or password.

To delete a user account:

1. Choose File > Manage Databases and click Administrator.
2. Select a database from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Select the user account in the user list.
4. Click Minus (-).

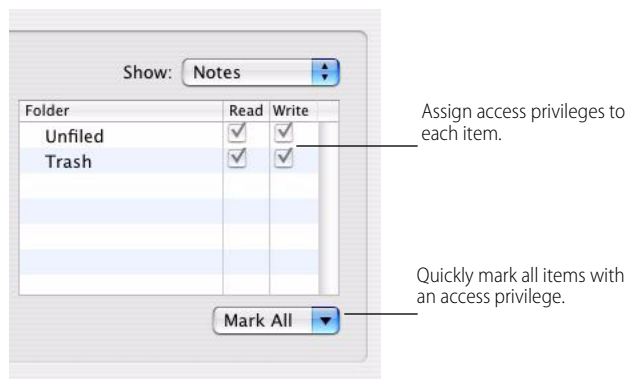
Assign Access Privileges

Access privileges provide a way to control the information in a database a user has access to. Access can be individually controlled for notes, contacts, and calendars. For example, notes are organized by folders, so access priv-

ileges are assigned on a per folder basis for each user account. This gives you flexibility in controlling which information users have access to. There are three levels of access that can be granted to a user:

- **None.** The user does not have any access to the item.
- **Read.** The user can view the contents of an item, but cannot change it.
- **Write.** The user can add or modify the contents of an item. It is possible to assign write-only access in certain situations. For example, you can give a user write-only access to the Trash folder for notes. This means the user can place a note in the Trash, but can't see the contents of the trash. In this case, you can think of a write-only folder as a “drop” folder.

Each item can be assigned a combination of these access privileges. For example, you can give John Read and Write access to a calendar, but only give Susan Read access to the same calendar.



To assign access privileges for notes:

Access privileges for notes are assigned on a per folder basis. There are two default folders in a database: Unfiled and Trash. The next section will show you how to create a folder in a shared database.

1. Choose File > Manage Databases and click Administrator.
2. Select a database from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Select a user account from the user list.
4. Select Notes from the Show pop-up menu.
5. Assign access privilege(s) for each folder listed.

Repeat these steps for each user account.

To create folders in a shared database:

Only the administrator can create a folder in a shared database. You will need to have SOHO Notes running and the shared database open in order to create folders in it.

1. Select a shared database in the folder list. The shared databases will be located at the top of the folder list.
2. Choose Folder > New.
3. Type a name for the folder and click OK.

Repeat these steps for each folder you want to create in a shared database.

To assign access privileges to calendars:

Access privileges for calendars are assigned on a per calendar basis. The next section will show you how to create

a calendar in a shared database.

1. Choose File > Manage Databases and click Administrator.
2. Select a database from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Select a user account from the user list.
4. Select Calendars from the Show pop-up menu.
5. Select a user account.
6. Assign access privilege(s) for each calendar listed.

Repeat these steps for each user account.

To create calendars in a shared database:

Only the administrator can create a calendar in a shared database. You will need to have SOHO Organizer running and the shared database open in order to create calendars in it.

1. Select a shared database in the Calendars column. The shared databases will be located at the top of the Calendars list.
2. Click Add(+) button at the bottom of the Calendars column.
3. Choose a color from the Color pop-up menu (choose Custom from the Color pop-up menu to create a new color).
4. Choose a type of calendar from the Type pop-up menu. The type of calendar will determine how dates are displayed in the various calendars views.
5. Click OK.

Repeat these steps for each calendar you want to create in a shared database.

To assign access privileges to contacts:

Access privileges for contacts are assigned on an all or nothing basis in a shared database.

1. Choose File > Manage Databases and click Administrator.
2. Select a database from the Database pop-up menu. If the database is not listed in the pop-up menu, then select Open Database from the pop-up menu and open the database. Be sure to log in using your administrator name and password.
3. Select a user account from the user list.
4. Select Contacts from the Show pop-up menu.
5. Assign access privilege(s) for All Contacts.

Repeat these steps for each user account.

Distribute Information to End Users

The end users in your organization will need to know the following information in order to connect to a shared database:

- Account name and password.
- Name of shared database.
- Server address.
- Read password (if one was set).

An example:

User Name: Susan

Password: 1234

Database: CompanyDB

Server Address: 192.168.0.1 or <http://www.chronosnet.com>

Read Password: 5678

Shared Database Backups (Administrators)

The administrator of a shared database will need to manually make a backup of it. In order to backup or restore a shared database, you need to be at the computer that the shared database is hosted on. Furthermore, you need to make sure ALL users are logged off of the shared database before proceeding

To backup a shared database:

1. Launch the OpenBase Manager application: /Applications/OpenBase/
2. Click the Local button and select the shared database in the list.
3. Choose Action > Configure Database.
4. Click the Backup tab.
5. Enable “Create a compressed copy of the database”.
6. Set the Backup Directory and Schedule. We suggest setting the schedule to a time when users will not be accessing the shared database.

To undo all recent changes and return to a database backup:

1. Uncompress the backup database by double-clicking it. You’ll end up with a native OpenBase database file.
2. Launch the OpenBase Manager application: /Applications/OpenBase/
3. Click the Local button and select the shared database in the list that you want to restore.
4. Choose Action > Stop Database, and then Action > Delete Database to delete your existing shared database. Use caution when performing this step since it will delete the current database so it can be replaced with the backup.
5. Drag the native OpenBase database file that was uncompressed to the following directory: /Library/OpenBase/Databases/
6. In OpenBase Manager select the database in the list. It may take a few minutes before the database shows up in the list.
7. Choose Action > Start Database.

Get Started (End Users)

This section will describe how to get started depending upon which SOHO series products you own.

To start working with contacts and calendars:

1. Launch SOHO Organizer. SOHO Organizer will automatically synchronize with the Mac OS X Address Book and iCal and your calendar and contact information will start appearing in SOHO Organizer. This may take anywhere from a few seconds to a few minutes depending upon how many calendar and contact information you have.

To start working with notes:

1. Launch SOHO Notes. A collection of default folders in your personal database will appear in the folders region. You can add notes to these folders or create your own folders. SOHO Notes can store contact information in its own database so that you can link notes to contacts. These contacts are automatically synchronized and will stay synchronized with the Mac OS X Address Book.

To print business documents:

1. Launch SOHO Print Essentials.
2. OR Launch SOHO Organizer and choose Print > Labels, Envelopes, Fax Covers, etc. to print the documents of your choice for the currently selected contacts.

Connect to a Shared Database (End Users)

When you first launch SOHO Organizer or SOHO Notes, a personal database will be created on your computer. Each subsequent time you launch either product, you'll automatically be connected to the personal database. This database is used to store your personal calendars, contacts, and notes. Other users will not have access to your personal database, nor can you grant them access.

A shared database, on the other hand, is a database where multiple users can share calendar, contact, and note information depending on which SOHO series products are being used. This section will provide you, the end user, with the necessary information to connect to a shared database.

Database Manager

The Database Manager is where you will open and close shared databases, take shared databases online/offline, and change your account password in a shared database. The following sections will discuss each of these tasks in detail.

To access the Database Manager for end users:

1. Open SOHO Notes.
2. Choose File > Manage Databases. The Database Manager window will appear.
3. Click the User button.

Open/Close Shared Databases

This section will show you how to open and close a shared database.

To open a shared database:

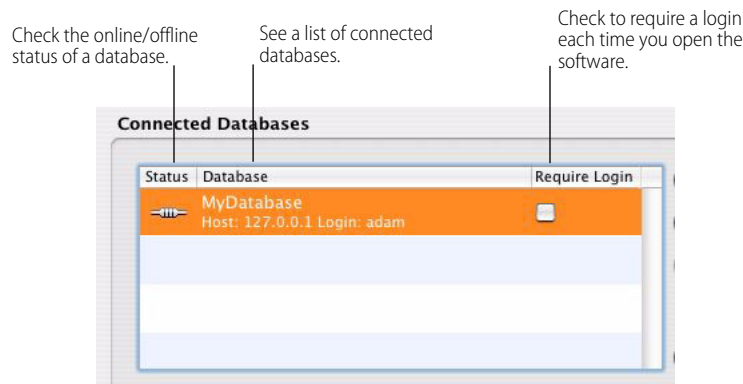
The administrator should have provided you with the following information, so you can open a shared database:

- Your account name and password.
- Name of shared database.
- Server address.
- Read password. The administrator may or may not have set a read password.

Once you have this information you're ready to open a shared database.

1. Choose File > Manage Databases and click User.
2. Click the Open button. The Open Database window will appear.
3. Enter or choose the server address, database, user name, and password.
4. Click Connect to open the database. Enter the Read password if your administrator set one and click OK.

The database will open and appear in the Connected Databases list of the Database Manager window.



5. Enable Require Login in the Connected Databases list if you want SOHO Notes to ask you for your account information each time you launch SOHO Notes. Otherwise, SOHO Notes will securely store your account information in your Keychain and will use it to open the shared database automatically.
6. Close the Database Manager window. If you're running SOHO Notes, the shared database will appear in the folder list. If you're running SOHO Organizer, the shared database will appear in the Calendar or Group list depending on what view you have opened.

To close a shared database:

When you close a shared database, SOHO Notes will not automatically open it the next time you launch the software. You will need to re-open the database manually using the instructions in the previous section.

1. Choose File > Manage Databases and click User.
2. Select the database you wish to close in the Connected Databases list.
3. Click the Close button.

To change the password of your user account:

You can change the password of your user account for a shared database. If you wish to change the user name of your account, you will need to contact your administrator to do this.

1. Choose File > Manage Databases and click User.
2. Select the shared database you wish to change the password of your user account.
3. Click the Change Password button.
4. Enter in your current password and click OK.
5. Enter in the new password and then enter it again to confirm it.
6. Click the Change Password button.

Online/Offline Shared Databases (Mobile End Users)

If you have a laptop computer, you understand that you can't always be connected to the shared database on your office network. Yet, you still may want to access and make changes to the notes, contacts, and calendars in a shared database while you're away. Now you can, and it's easy to do. Simply, take the shared database "offline" before you disconnect from the office network and then later bring the shared databases "online" after you've reconnected to the office network.

When you take a shared database offline, a mirror copy of the shared database is copied to your computer. This becomes the "offline" shared database. While you're away from the office, you can access and make changes to

the offline database. When you return to the office and bring your offline database online again, changes made to the offline database on your computer are synchronized with the online database on the network. It's that easy.

To take a shared database offline:

When a database is taken offline, a mirror copy of the shared database is saved on your computer so you can continue to work on it even when you're not connected to the network.

1. Choose File > Manage Databases and click User.
2. Select the database you wish to take offline. The Status column in the Connected Databases list will show you whether you're currently accessing the online or offline version of the shared database.
3. Click Go Offline.

To take a shared database online:

When you bring a database back online, all of your changes are synchronized with the original online shared database on the network.

1. Choose File > Manage Databases and click User.
2. Select the database you wish to bring online. The Status column in the Connected Databases list will show you whether you're currently accessing the online or offline version of the shared database.
3. Click Go Online.

Please note that if a modification to a record has been made in both the offline database and the main shared database, the modification in the offline database will overwrite the modification in the main shared database.

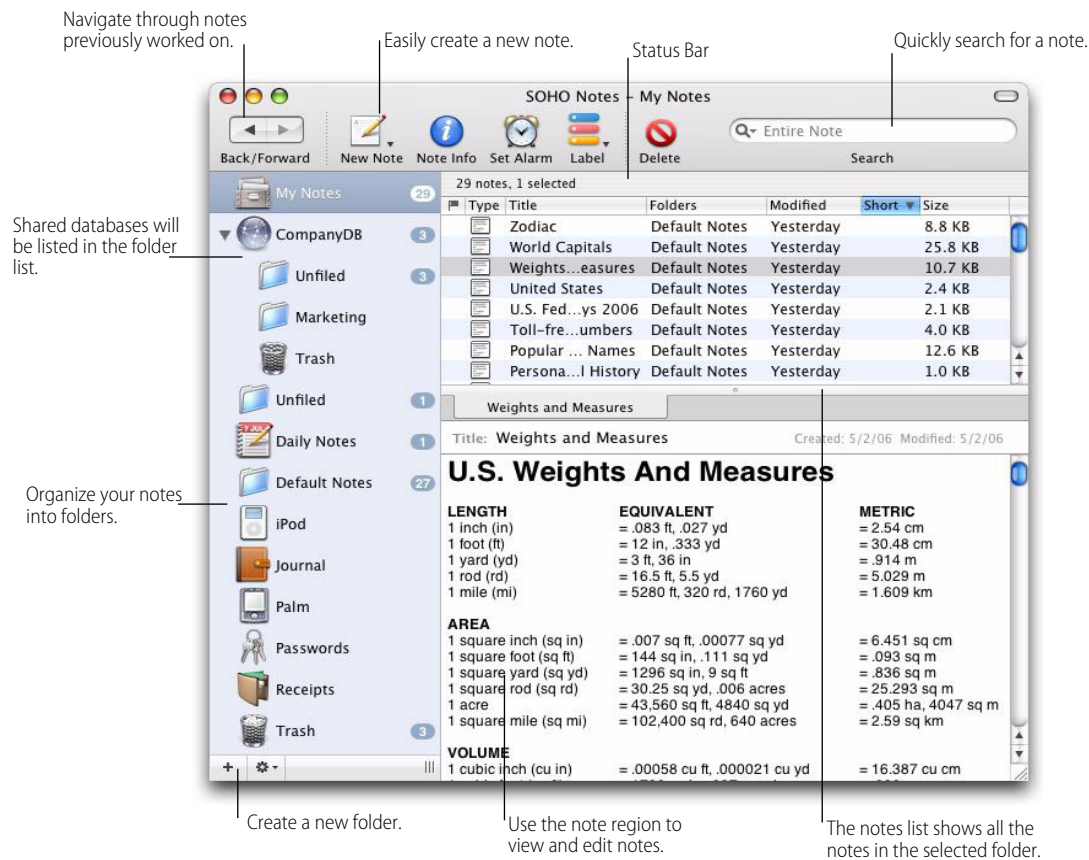
Chapter 6

Using SOHO Notes

The purpose of this chapter is to acquaint you with the basics of using SOHO Notes. The basics include the viewer window, tabs, sorting, and searching.

Viewer Window

When you first launch SOHO Notes the viewer window will be the first window you see. The viewer window is primarily used to create, edit, search, and view notes. The viewer window is comprised of a toolbar, status bar, notes list, note region, and folders list.



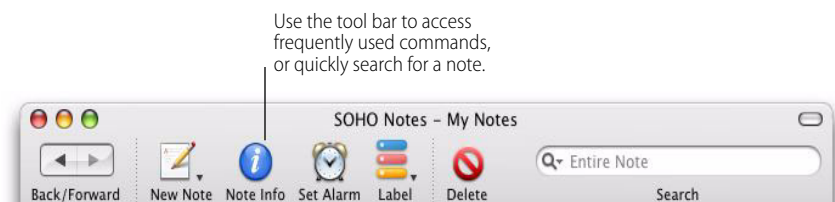
To open a viewer window:

The first time SOHO Notes is launched a viewer window will open. You can open any number of viewer windows. SOHO Notes will automatically remember and reopen your viewer windows between launches of the application.

1. Choose File > New Viewer Window. Repeat this step to open multiple viewer windows.

Toolbar

The toolbar at the top of the viewer window provides quick access to frequently used commands. You can choose which commands appear in the toolbar and how they are arranged.



To customize the toolbar:

1. Choose View > Customize Toolbar.
2. Drag items into, out of, or to a new location in the toolbar.

To quickly rearrange a toolbar, hold down the Command key and drag a toolbar item to a new location, or drag it out of the toolbar to remove it.

To show or hide the toolbar:

1. Choose View > Show ToolBar or Hide Toolbar.

Status Bar

The status bar displays the number of notes in the selected folder and the number of selected notes.

To show or hide the status bar:

1. Choose View > Show Status Bar or Hide Status Bar.

Notes List

The notes list displays the title and other related information for all of the notes in the selected folder.

To add or remove columns:

1. Choose View > Note Columns, and choose a column. Repeat this step to add or remove additional columns.

To rearrange columns in the viewer window:

1. Click and drag the column heading to a new position. As you drag the column heading, the other columns will automatically move so you know exactly where the dragged column will be placed.

Folders

Folders are used to organize your notes. When you select a folder, the notes in the folder will be listed in the notes list in the viewer window. For more information on folders see Chapter 8 *Creating And Working With Folders* on page 48.

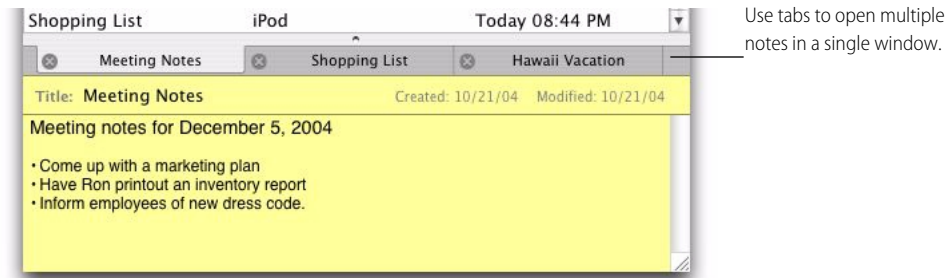
To show or hide the folders:

1. Choose View > Show Folders or Hide Folders, or click Folders in the toolbar.

Tabs

You can open a note in a tab rather than opening the note in a separate window or replacing the contents of the current viewer window. This allows you to open and view multiple notes without having to open and manage

multiple windows.



To open a note in a new tab:

When you open a note in a tab, the tab will appear in the tab bar, which is located below the notes list.

1. Choose File > New Tab, and select a note or hold down the Option key and select a note.

By default, new tabs will automatically be selected. This can be disabled in the Tabs preferences (SOHO Notes > Preferences, and click the Tabs button).

To close a tab:

1. Click the close button on the tab.

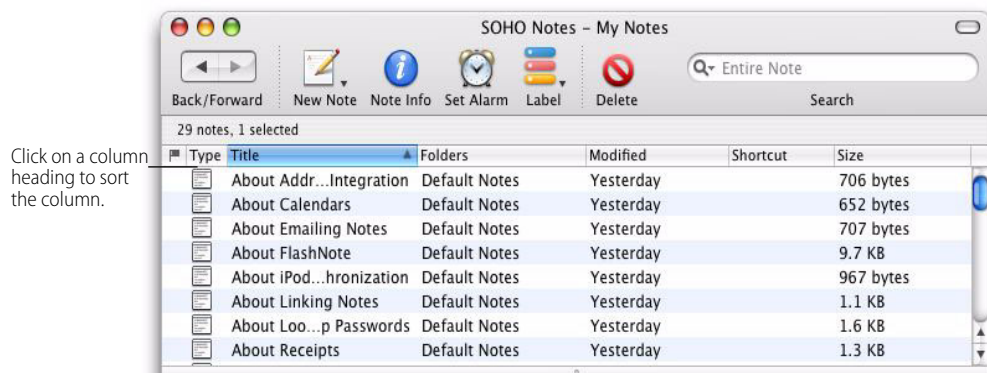
To always show the tab bar:

By default the tab bar will only show if there's at least one tab open.

1. Choose SOHO Notes > Preferences, and click the Tabs button.
2. Select Always show tab bar.

Sorting

You can sort any column in the viewer window's notes list in either ascending or descending order.



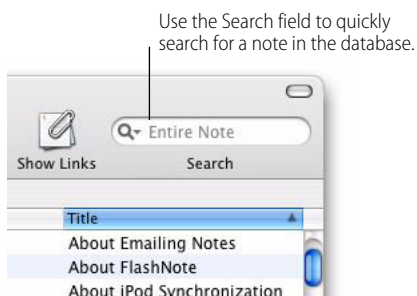
To sort on a column:

1. Choose View > Sort Notes By, and select a column to sort on. You can also click the column heading in the notes list. Repeat this step to reverse the sort order.

A blue column heading indicates that the column is being sorted on. The arrow in the column heading will indicate whether the column is being sorted in ascending or descending order.

Searching

You can search for text in an open note, all notes of a folder, or in all folders in a particular database. Plus, you can choose which columns to show in the search results and which column to sort on. In addition, you can use Apple's Spotlight to search for notes in your personal database. For more information on Spotlight visit www.apple.com.



To search for text in an open note:

1. Choose Edit > Find > Find.
2. Enter the text you want to find and click Next.
3. Click Next again to find the next occurrence of the text.

To search for text in all notes of a folder:

1. Select a folder in the folders drawer.
2. Click in the Search field at the top of the viewer window.
3. Type the text you want to find.
4. Choose Entire Note or Titles Only from the Search field pop-up menu to specify what part of each note to search.
5. Press the Return key.

To search for text in all folders of a particular database:

1. Select the My Notes folder or a shared database in the folders list.
2. Click in the Search field at the top of the viewer window.
3. Type the text you want to find.
4. Choose Entire Note or Titles Only from the Search field pop-up menu to specify what part of each note to search.
5. Press the Return key.

To choose which columns are shown in the search results:

When a search is performed a special set of columns related to searching are displayed in the notes list. You can choose which columns you would like in this special set of search columns.

1. Choose View > Search Columns, and select a column. Repeat this step to add or remove additional columns.

To choose which column is sorted on in the search results:

When a search is performed a special set of columns related to searching are displayed in the notes list. You can choose which column in this special set of search columns is sorted on by default.

1. Choose View > Sort Search By, and select a column.

Chapter 7

Creating and Working with Notes

The purpose of this chapter is to describe how to create and work with notes including many powerful features to make your life easier.

Create a Note

This section will describe how to create and duplicate notes within SOHO Notes. Notes can also be created from other applications even if SOHO Notes is not running. For more information on creating notes from other applications see Chapter 10 *Shortcuts* on page 57.

To create a note:

1. Choose File > New Note or choose File > New Note > and select a type of note from the submenu. For more information on note types see *Note Types* on page 27.
2. Type a title for the note in the title field. The title field is located in the title bar region of the note along with the created and modified dates of the note (by default the title bar is shown). To show or hide the title bar choose View > Show/Hide Note Title Bar. If the title bar is hidden when you create a note, SOHO Notes will automatically use the first line of text in the note as the title.
3. Add the appropriate content to the main body of the note depending on its type.
4. Choose File > Save to save the note. Even if you don't manually save the note, SOHO Notes will automatically save the note for you.

By default the new note will be added to the selected folder in the top viewer window. If a viewer window is not open, SOHO Notes will ask you which folder the new note should be added to. The default type for a note is determined by the selected folder. For more information on setting the default note type for a folder see *Creating And Working With Folders* in Chapter *Creating And Working With Folders* on page 48.

Tip: The created and modified dates in the title bar can be hidden by disabling “Show created & modified dates in note title bar” in the Appearance preference (SOHO Notes > Preferences, and click the Appearance button).

To duplicate note(s):

1. Select the note(s) that you want to duplicate.
2. Choose Note > Duplicate.

Note Types

SOHO Notes provides different types of notes for storing information. These types include Text, Pages, Sticky, Audio, File, Image, PDF, Movie, and Web Archive. Each type of note contains specialized controls to make working with its content easier and straightforward. For example, an Audio note is used to store audio files and thus includes controls for playing, pausing, and fast forwarding the audio file within the note.

To change the type of a note:

If the type of a note is Text, Pages, or Sticky, you can change its type to another text related type (Text, Pages, or Sticky). If the type of a note is a non-text (i.e. Audio, File, etc.), you can't change its type.

1. Select the note(s).
2. Choose Note > Note Type, and select a type from the menu.

Text, Pages, and Sticky Notes

The Text, Pages, and Sticky types of notes are primarily used to store text, but you can store other items such as web clippings, images, etc. Each of these notes can have a different color, texture, or picture applied to its background. Their primary difference is how each of them look and handle text.



- **Pages.** This type wraps the text according to the page size and its margins.
- **Text.** This type wraps the text to the note window.
- **Sticky.** This type is a standard looking sticky note. The sticky note is the only type that does not have a toolbar and the only type that can be made translucent and made to float above all other windows on the screen.

To float a sticky note in front of other windows:

Sticky notes can be made to float in the foreground of your computer screen to prevent it from being hidden by other windows.

1. Choose Note > Get Info. This will open the Note Info window.
2. Click the Settings tab.
3. Select Floating Window.

To make a sticky note translucent:

Sticky notes can be made translucent so you can see what is behind them. This is useful for stickies that are floating in the foreground of your computer screen.

1. Choose Note > Get Info. This will open the Note Info window.
2. Click the Settings tab.
3. Click the Window Opacity pop-up menu and select an opacity setting.

To change the background color of a note:

1. Select the note(s).
2. Choose Note > Change Background, and select a color from the list.

To define a note color:

You can define your own note colors to make it easy to reuse the same color.

1. Choose Note > Background > Define Note Colors. The Define Colors dialog will open.
2. Click Add to add a new color.
3. Type a name for the new color.
4. Click the color well to choose a color for that color name.

To add a background texture to a note window:

1. Select the note(s).
2. Choose Note > Change Background > Texture, and select a texture from the menu. The background of the note will be drawn in the selected texture.

You can also create your own textures. Simply create a graphics file in almost any popular graphics format and place it in the following directory (where “~” denotes your home folder):

- ~/Library/Application Support/Chronos/SOHO Notes/Textures/

New textures only become available after SOHO Notes is relaunched.

To add background picture to a note window:

1. Select the note(s).
2. Choose Note > Change Background > Picture, and select a picture from the menu. The selected picture will appear in the background of the note. The picture will automatically resize to the dimensions of the note.

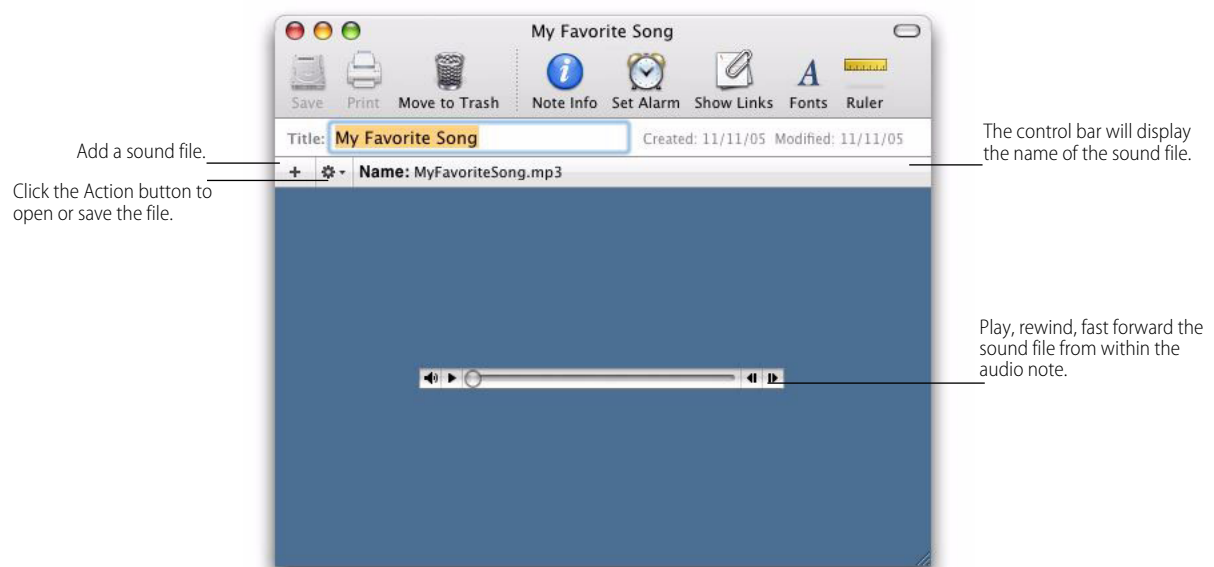
You can also use your own pictures in SOHO Notes in almost any popular graphics format. Simply place your pictures in the following directory (where “~” denotes your home folder):

- ~/Library/Application Support/Chronos/SOHO Notes/Textures/

New pictures only become available after SOHO Notes is relaunched.

Audio Notes

Audio notes are used to store, play, and record sound files. All popular QuickTime sound formats (mp3, AIFF, AAC, etc.) can be stored and played in Audio notes. When a sound file is added to a note, you will be able to play, pause, fast forward, and rewind it using the standard QuickTime controls. When you record a sound file it will be saved in the mp3 sound format.

**To add a sound file to an Audio note:**

Only one sound file can be added to an Audio note.

1. Choose File > New Note > Audio.
2. Type a title for the note in the Title field.

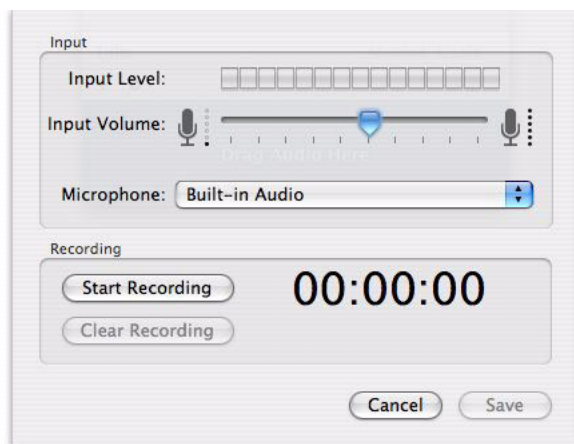
3. Click Add (+) on the control bar. A standard choose file sheet will appear.
4. Select an audio file and choose to either copy it into the note or link it to the note.
 - **Copy into note:** The entire file will be stored in the note and the name of the file will be displayed in the control bar of the note.
 - **Link to note:** A simple link to the file on disk will be stored in the note and the path to the file will be displayed in the control bar of the note.
5. Click Open.

You can also drag and drop a sound file from the Finder to an Audio note. By default the sound file will be copied into the note. If you want to link the sound file to the note, drag the file to the note with the control key held down.

To record a sound file:

When you record a sound file it will be stored in the audio note. You will be able to play, pause, rewind, etc. the recorded sound file like any other sound file.

1. Choose File > New Note > Audio.
2. Type a title for the note in the Title field.
3. Choose Record from the Action button pop-up menu.



4. Choose a microphone to record with from the Microphone pop-up menu.
5. Adjust the input volume for the selected microphone.
6. Click the Start Recording button when you want to start recording.
7. Click the Pause button when you are finished recording or need to take a break.
8. Click the Clear Recording button if you want to clear the current recording and start over.
9. Click the Save button when you want to save the recording.

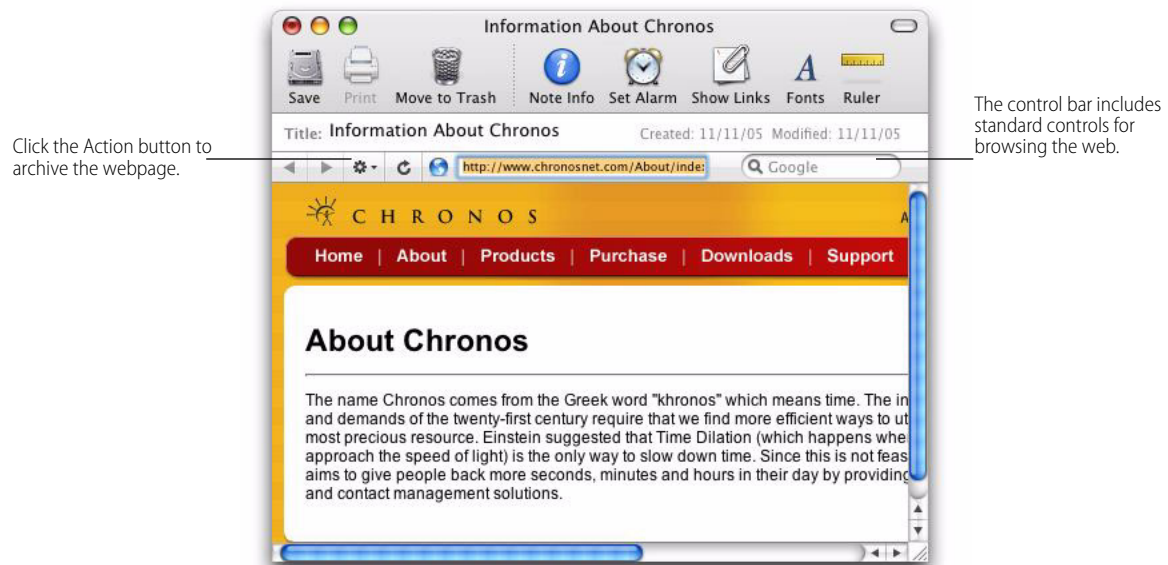
To save the sound file out to disk:

If you copied the sound file into the note, you can later save the file out to disk.

1. Choose Save Copy As from the Action button pop-up menu.
2. Type a name for the sound file.
3. Click Save.

Bookmark Notes

Bookmark notes are used to store a webpage URL in a note. The body of the note contains an integrated web browser so you can view the webpage provide you have a live Internet connection. The integrated web browser includes standard controls for browsing the Internet: forward, back, reload buttons and a Google search field. You can also easily create a static Web Archive note from a Bookmark note that permanently preserves the content of a webpage. For more information on Web Archive notes see *Web Archive Notes* on page 36.



To add a web URL to a Bookmark note:

1. Choose File > New Note > Bookmark.
2. Type a title for the note in the Title field.
3. Type a web URL in the URL field of the control bar and press return. The integrated web browser will load in the webpage.

When you save the note, the last URL visited will be saved with the note. The next time you select the note, the integrated web browser will automatically load in this webpage.

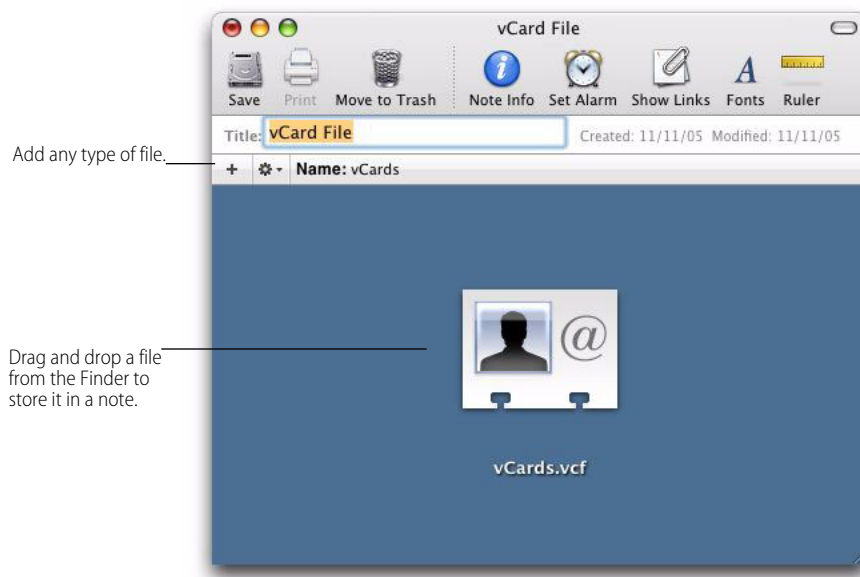
To create a Web Archive note from a Bookmark note:

1. Select a Bookmark note and wait for the corresponding webpage to finish loading.
2. Choose Archive this Page from the Action button pop-up menu. A web archive of the current webpage will be created and saved into a new Web Archive note. For more information on Web Archive notes see *Web Archive Notes* on page 36.

File Notes

File notes are used to store any type of file. This can be anything from a TextEdit document to a Photoshop

picture.



To add a file to a File note:

Only one file can be added to a File note.

1. Choose File > New Note > File.
2. Type a title for the note in the Title field.
3. Click Add (+) on the control bar. A standard choose file sheet will appear.
4. Select a file and choose to either copy it into the note or link it to the note.
 - **Copy into note:** The entire file will be stored in the note and the name of the file will be displayed in the control bar of the note.
 - **Link to note:** A simple link to the file on disk will be stored in the note and the path to the file will be displayed in the control bar of the note.
5. Click Open.

You can also drag and drop a file from the Finder to a File note. By default the file will be copied into the note. If you want to link the file to the note, drag the file to the note with the control key held down.

To save a file out to disk:

If you chose to copy the file into the note, you can later choose to save the file out to disk.

1. Choose Save Copy As from the Action button pop-up menu.
2. Type a name for the file.
3. Click Save.

You can also drag the file out of the note and drop it in the Finder.

To open a file:

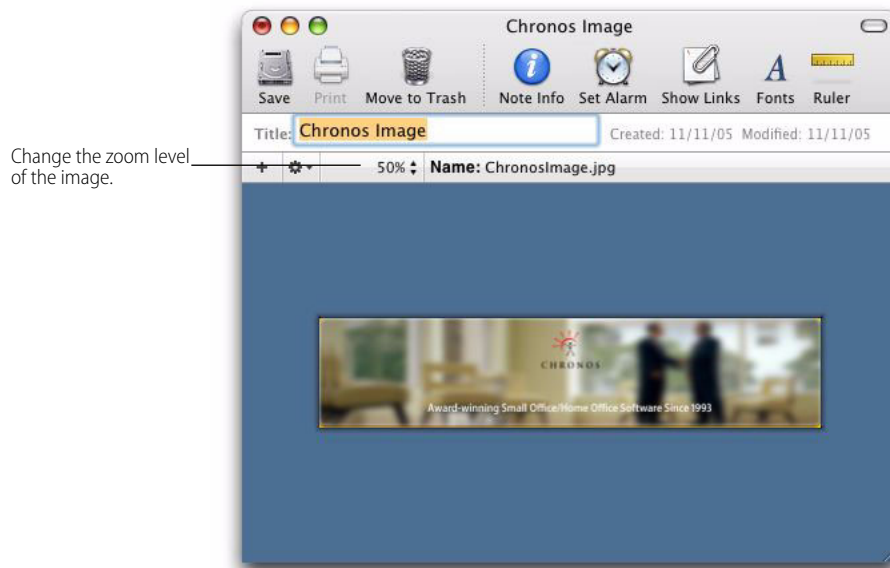
1. Choose Open with... from the Action button pop-up menu, or click the file in the note.

If the file was linked to the note, then the file on disk will be opened. If the file was copied into the note, SOHO Notes will create a temporary file on disk and open it. The temporary file is saved in the following directory: ~/Library/Application Support/Chronos/SOHO Notes/Opened Files/ (“~” denotes your home folder). Any

changes made to the temporary file will only be saved to the temporary file and not the file stored in the note.

Image Notes

Image notes are used to store and display image files in most popular formats including jpeg, gif, png, etc. The Image note includes a zoom control to let you zoom in and out on the image.



To add an image to an Image note:

Only one image file can be added to an Image note.

1. Choose File > New Note > Image.
2. Type a title for the note in the Title field.
3. Click Add (+) on the control bar. A standard choose file sheet will appear.
4. Select an image and choose to either copy it into the note or link it to the note.
 - **Copy into note:** The entire file will be stored in the note and the name of the file will be displayed in the control bar of the note.
 - **Link to note:** A simple link to the file on disk will be stored in the note and the path to the file will be displayed in the control bar of the note.
5. Click Open.

You can also drag and drop a image file from the Finder to an Image note. By default the image file will be copied into the note. If you want to link the image file to the note, drag the file to the note with the control key held down.

To save the image file out to disk:

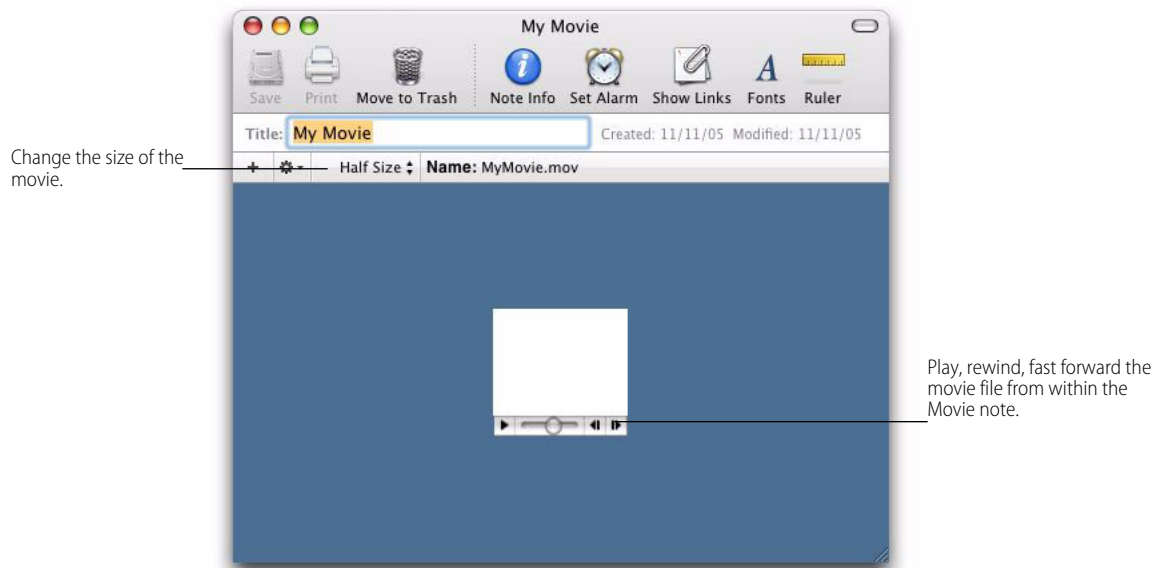
If you copied the image into the note, you can later save the image out to disk.

1. Choose Save Copy As from the Action button pop-up menu.
2. Type a name for the image file.
3. Click Save.

You can also drag the image out of the note and drop it in the Finder.

Movie Notes

Movie notes are used to store and watch movie files. All popular QuickTime movie formats (mov, mpeg, etc.) are supported in movie notes. When a movie file is added to a note, you will be able to play, fast forward, and rewind it using the standard QuickTime controls. Plus, you can use the Size control to adjust the size of the movie inside the note.



To add a movie to a Movie note:

Only one movie file can be added to a Movie note.

1. Choose File > New Note > Movie.
2. Type a title for the note in the Title field.
3. Click Add (+) on the control bar. A standard choose file sheet will appear.
4. Select a movie and choose to either copy it into the note or link it to the note.
 - **Copy into note:** The entire file will be stored in the note and the name of the file will be displayed in the control bar of the note.
 - **Link to note:** A simple link to the file on disk will be stored in the note and the path to the file will be displayed in the control bar of the note.
5. Click Open.

You can also drag and drop a movie file from the Finder to a Movie note. By default the movie file will be copied into the note. If you want to link the movie file to the note, drag the file to the note with the control key held down.

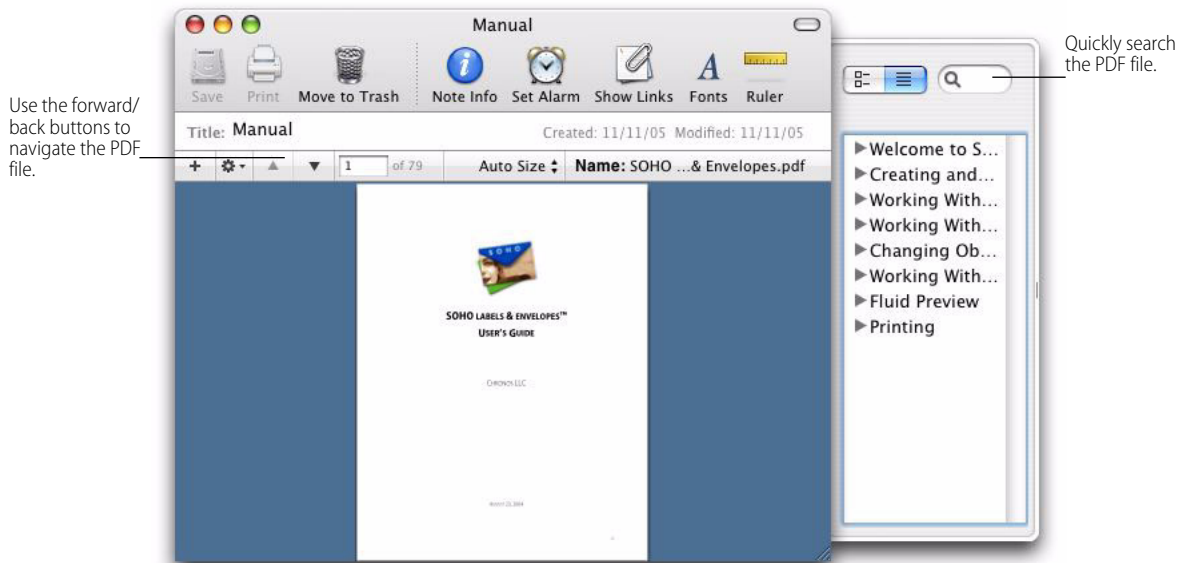
To save the movie file out to disk:

If you copied the movie into the note, you can later save the movie out to disk.

1. Choose Save Copy As from the Action button pop-up menu.
2. Type a name for the movie file.
3. Click Save.

PDF Notes

PDF notes are used to store and view PDF files. PDF notes contain specific controls for viewing and working with PDF files. The contents of the PDF file can be searched just like any other note in SOHO Notes. For more information on the search feature see *Searching* in Chapter *Using SOHO Notes* on page 26.



To add a PDF to a PDF note:

Only one PDF file can be added to a PDF note.

1. Choose File > New Note > PDF.
2. Type a title for the note in the Title field.
3. Click Add (+) on the control bar. A standard choose file sheet will appear.
4. Select a PDF and choose to either copy it into the note or link it to the note.
 - **Copy into note:** The entire file will be stored in the note and the name of the file will be displayed in the control bar of the note.
 - **Link to note:** A simple link to the file on disk will be stored in the note and the path to the file will be displayed in the control bar of the note.
5. Click Open.

You can also drag and drop a PDF file from the Finder to a PDF note. The PDF file will be linked to the note.

To create a PDF note from another application:

You can create a PDF note from any application that you can print from.

1. Open any application.
2. Choose File > Print.
3. Choose Save PDF to SOHO Notes from the PDF button pop-up menu.

By default the PDF note will be created in the Unfiled folder. You can change the default folder in the Service preferences (SOHO Notes > Preferences, click the Services button).

To save the PDF file out to disk:

If you copied the PDF into the note, you can later save the PDF out to disk.

1. Choose Save Copy As from the Action button pop-up menu.
2. Type a name for the PDF file.
3. Click Save.

You can also drag the PDF out of the note and drop it in the Finder.

To open the drawer:

PDF notes include a drawer which is used to find text and view the table of contents.

1. Choose Drawer from the Action button pop-up menu.

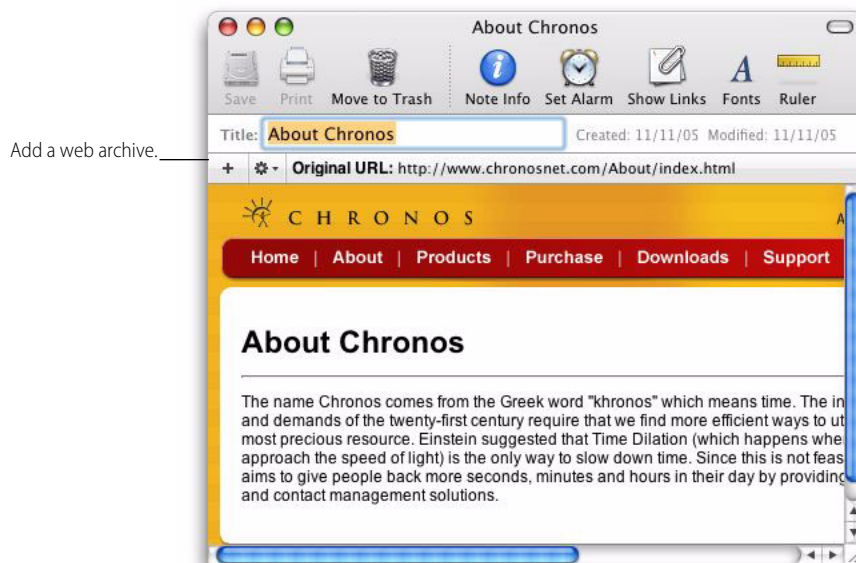
To view pages in a PDF file single, side-by-side, or continuous:

1. Choose Single Page, Facing Pages, or Continuous from the Action button pop-up menu.

Web Archive Notes

Web Archive notes are used to store and view web archives. You can permanently save webpages and the content they contain, such as text, images, and other items in a web archive. The links on an archived webpage continue to work as long as the destination webpages are available. Web archives are especially useful for pages that might not be on the web for long, such as receipts.

A web archive file can be created from a Web Archive note, Safari application or from Bookmark notes. For more information on Bookmark notes see *Bookmark Notes* on page 31. For more information on creating web archives from Safari, launch Safari and choose Help > Safari Help.



To create a web archive of a web page:

1. Choose File > New Note > Web Archive.
2. Type a title for the note in the Title field.
3. Enter a URL in the URL field of the web page you want to archive and press return (you can also drag a URL from Safari to the URL field).

To add a web archive file to a Web Archive note:

Only one web archive file can be added to a web archive note.

1. Choose File > New Note > Web Archive.
2. Type a title for the note in the Title field.
3. Click Add (+) on the control bar. A standard choose file sheet will appear.
4. Select a web archive and choose to either copy it into the note or link it to the note.
 - **Copy into note:** The entire file will be stored in the note and the original URL of the webpage will be displayed in the control bar of the note.
 - **Link to note:** A simple link to the file on disk will be stored in the note and the path to the file will be displayed in the control bar of the note.
5. Click Open.

You can also drag and drop a web archive file from the Finder to a Web Archive note. By default the web archive file will be copied into the note. If you want to link the web archive file to the note, drag the file to the note with the control key held down.

To save the web archive file out to disk:

If you copied the web archive into the note, you can save the web archive out to disk.

1. Choose Save Copy As from the Action button pop-up menu.
2. Type a name for the web archive file.
3. Click Save.

Full Screen Mode

You can view and edit a note in full screen mode. Plus, there are various preferences you can set when you view and edit a note in full screen mode. These include changing the background and text color, the text zoom, and whether to show or hide the note title bar.

To view/edit a note in full screen mode:

1. Select a note.
2. Choose View > Full Screen.

To exit full screen mode:

1. Press the escape key or press the key combination assigned to full screen mode.

To change the preferences for a note when it's being viewed in full screen mode:

1. Choose SOHO Notes > Preferences, and click the Full Screen button.
2. Change the preferences.

Alarms

If you don't want to miss an appointment or some other important event, you should assign an alarm to your note. You can set the alarm to launch SOHO Notes if it's not running, play a sound, or a combination of both.

To assign an alarm to a note:

1. Select a note.
2. Choose Note > Set Alarm, or click Set Alarm in the toolbar to open the Alarm sheet.
3. Set the Alarm Date and Alarm Time. The default alarm time can be set in the Alarm preferences (choose SOHO Notes > Preferences and click the Alarms button).

4. Set the Alarm Options. The following is a list of options that can be set for an alarm:
 - **Play alarm sound.** When an alarm goes off, SOHO Notes will play the alarm sound specified in the Alarm preferences.
 - **Launch.** When an alarm goes off, SOHO Notes will automatically launch if it's not running. This option only works for alarms assigned to notes in the personal database.
 - **Critical alarm.** With a regular alarm, the alarm sound will only play once. A critical alarm will automatically bring SOHO Notes to the foreground and the alarm sound will play every five seconds until you dismiss it.
5. Click Set Alarm to save the alarm settings.

The user that assigns an alarm to a note in a shared database will be the only one that gets notified when the alarm goes off. The shared database will need to be connected in order to be notified when the alarm goes off.

To remove an alarm from a note:

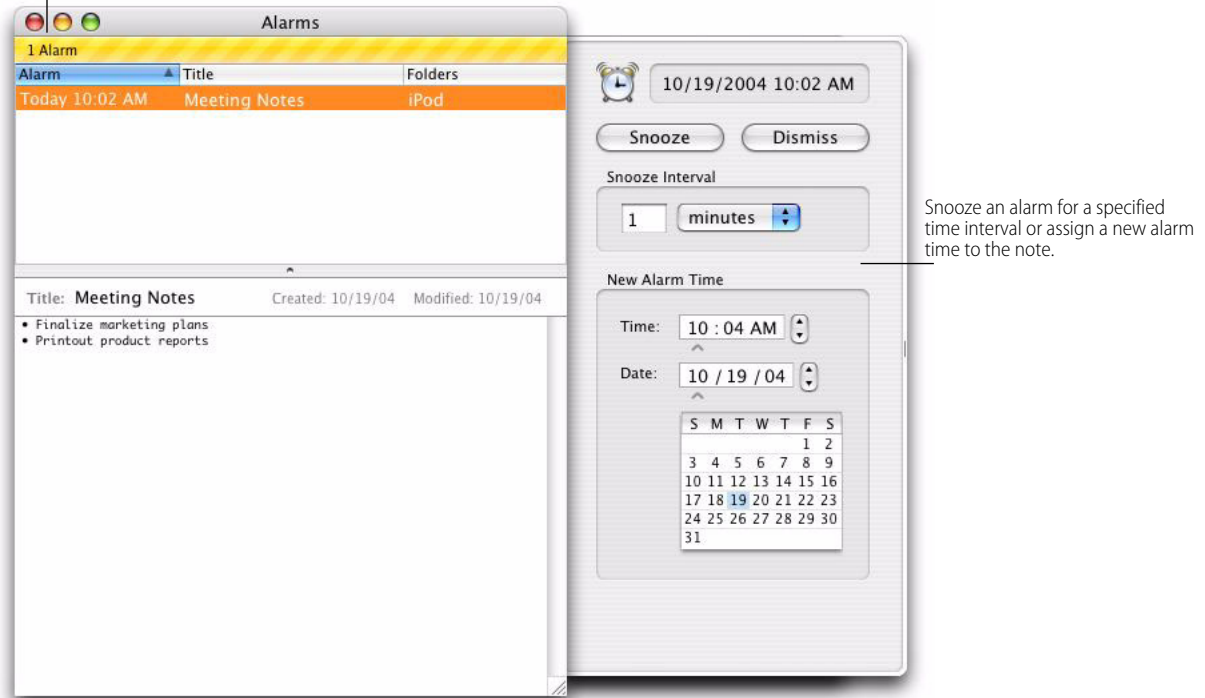
1. Select a note.
2. Choose Note > Set Alarm, or click Set Alarm in the toolbar to open the Alarm sheet.
3. Click Remove Alarm to disable the alarm.

To attend to pending alarms:

When an alarm goes off, the Alarms window will open and any alarm options will execute that have been assigned to the note. The Alarms window will list all alarms that have gone off and each alarm can be a) snoozed for a specified time interval; b) assigned a new date and time; or c) the alarm can be dismissed. You can set a default action and snooze time for alarms in the Alarms preferences (SOHO Notes > Preferences, and click the Alarms

button).

The Alarms window will show all alarms that have gone off.



Email a Note

A note can be emailed using your email application (works with most popular email clients). SOHO Notes will automatically launch your email application if it's not already running and create a new email message with the contents of the note.

To email a note:

1. Select a note.
2. Choose Note > Email Note, or click Email Note in the toolbar.

Please note that emailing non-text note may not work with some email applications.

Note Info

The Note Info window provides quick access to various settings that can be applied to an individual note. In addition, it provides information about the note such as its created and modified dates.

To access Note Info:

1. Select a note.
2. Choose Note > Get Info, or click Note Info in the toolbar.

The settings that can be applied to the selected note are organized into three different tabs: General, Background

and Margins. For a description of each of the settings in the tabs see TABLE 1. “Note Info Settings”.

TABLE 1. Note Info Settings

Attribute	Description
Title	This is the title of the note.
General	
Type	Use this setting to change the type of the note. For more information on note types see Chapter 7 <i>Creating and Working with Notes</i> on page 27.
Is Private	Use this setting to mark the note as private. For more information on using the private feature see Chapter 7 <i>Creating and Working with Notes</i> on page 42.
Is Flagged	Use this setting to mark the note as flagged. For more information using the flagged feature see Chapter 7 <i>Creating and Working with Notes</i> on page 42.
Shortcut	Use this setting to assign a shortcut to the note. A note shortcut will allow you to quickly and easily paste the note content into another application or grab and append content from another application into the note. For more information on shortcuts see Chapter 10 <i>Shortcuts</i> on page 57.
Other	These settings will tell you the size of the note and which folders the note belongs to. Plus, you will be able to modify the created and modified dates of the note.
Background	
Color	Use this setting to change the color of the note window.
Texture	Use this setting to assign a texture to the background of the note window. This setting only applies to Text, Pages, and Sticky notes.
Picture	Use this setting to assign a picture to the background of the note window. This setting only applies to Text, Pages, and Sticky notes.
Sticky Window Settings	These setting will only work with Sticky notes. The Window Opacity setting controls the translucency of the note window. This is useful for stickies that are floating in the foreground of your computer screen. The Floating Window setting will cause the note to float in the foreground of your computer screen to prevent it from being hidden by other windows.
Margins	
Margins	Use this setting to set the margins of the note. This setting only applies to Text, Pages, and Sticky notes.

Insert Special Items Into Notes

You can insert special items into a note including the current date, the current time, pictures, to-do type check boxes, and calendars.

To insert specials items into a note:

1. Select a note and click in the note where you’d like to insert a special item.
2. Choose one of the following insert items from the Format menu:

- **Insert Date.** Inserts the current date into the note using the long date format selected in the Date and Time System Preferences.
- **Insert Time.** Inserts the current time into the note using the time format selected in the Date and Time System Preferences.
- **Insert Picture.** Inserts a picture into the note. The picture can be in almost any popular graphics format.
- **Insert Calendar.** Inserts a calendar into the note. You will be able to select the month, year, and size of the calendar to insert into the note.
- **Insert Check Box With Current Style.** Inserts a check box into the note using the currently selected check box type in the Format > “Insert Check Box” menu. You can use this feature to build a to-do list. Insert a check box, then type a description of the task (e.g. “Buy groceries”). You can check off the task by clicking the check box.
- **Insert Check Box.** This menu will list various check box types that can be inserted into a note. Selecting a check box will insert it into the selected note.

Hyperlink

You can hyperlink text in a note to an email address, web address (www), ftp address, file on your hard drive, etc. When text is hyperlinked it will appear and work just like a link on a webpage. For example, if you link some text in a note to “www.chronosnet.com” and you click on the link, SOHO Notes will launch your web browser and display that webpage. Furthermore, SOHO Notes can scan selected text or an entire note for URLs and turn them into hyperlinks.

To hyperlink text:

1. Select the text you wish to hyperlink.
2. Choose Format > Hyperlink. A drop-down sheet will appear.
3. Enter the URL to which the selected text should be linked. The following is a list of items that can be linked to the selected text:
 - **Email address.** An email address can take the form of bobby@chronosnet.com or mailto:bobby@chronosnet.com.
 - **Web address.** A web address can take the form of www.chronosnet.com, http://www.chronosnet.com, or any other valid web address form.
 - **FTP address.** A ftp address can take the form of ftp.chronosnet.com, ftp://ftp.chronosnet.com, or any other valid ftp address form.
 - **File.** The path to the file will need to be entered in the following form: file://localhost/Users/bobby/Desktop/schoolpaper.txt
4. Click OK to save the changes.

To scan text for URLs and turn them into hyperlinks:

1. Select the text in a note you wish to scan for URLs, or select a note to scan the entire text of the note for URLs.
2. Choose Format > Scan For Hyperlinks.

SOHO Notes will turn any web, ftp, or email URL it comes across into a hyperlink. For example, if SOHO Notes comes across the text “www.chronosnet.com”, it will automatically hyperlink that text to “http://www.chronosnet.com”.

To remove hyperlinks from text:

1. Select the text in a note you wish to remove hyperlinks from, or select a note to remove hyperlinks from the entire text of the note.
2. Choose Format > Remove Hyperlinks.

Private Notes

You can mark a note as private if you wish to keep it confidential. This option is useful for personal information, passwords, account numbers, etc. In order to view private notes, you must enter a password.

To mark a note as private:

1. Select the note(s).
2. Choose Note > Is Private.

To hide private notes:

1. Choose View > Hide Private Notes. The first time you choose this option you will be prompted to enter a password. You **MUST** remember your password in order to view the private notes.

To show private notes:

1. Choose View > Show Private Notes.
2. Enter your password.
3. Click OK to show the private notes.

Flag Notes

You can flag a note if you want to follow up on it at a later time. Plus, you can quickly show only those notes that have been flagged.

To flag a note:

1. Select the note(s).
2. Choose Note > Is Flagged.

To show flagged notes:

1. Choose View > Show Only Flagged Notes.

To show flagged and unflagged notes:

1. Choose View > Show Flagged/Unflagged Notes.

Label Notes

You can assign labels to your notes as a way of categorizing them. SOHO Notes comes with several labels already defined, but you can add as many labels as you would like.

To assign a label to a note:

1. Select the note(s).
2. Choose Note > Change Label > and select a label.

To add or delete a label:

1. Choose Note > Change Label > Edit Labels.
2. Click the add(+) button to add a label.
3. Select a label and click the minus(-) button to delete it.
4. Click the color well to change a color of a label.

Link Notes

Linking provides a way to keep notes that are relevant to each other linked together. In addition to linking notes together, you can link notes to contacts. For more information on linking notes to contacts see Chapter 9 *Contacts* on page 55.

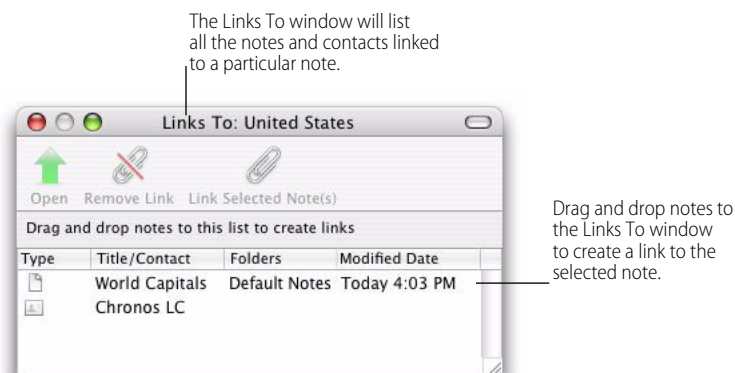
You can link notes together either using the Links To window or by drag and drop. You can link a note to any number of other notes. The only restriction is that you can only link notes to notes that are in the same database. For example, you can't link a note in your personal database to a note in a shared database.

To link a note to another note using drag and drop:

1. Select a note that you would like to link to another note.
2. Drag and drop the selected note on to the other note. The cursor will change to a curved arrow as you drag a note over another note letting you know the two notes will be linked together.

To link a note to another note using the Links To dialog:

1. Select a note that you would like to link to another note.
2. Choose Note > Show Links, or click Show Links in the toolbar to open the Links To window.



3. Select note(s) from the viewer window that you would like to link to the note previously selected. Hold down the shift key to select multiple contiguous notes. Hold down the command key to select multiple notes in a non-contiguous fashion.
4. Click Link Selected Notes(s) in the Links To window or drag and drop the note(s) to the Links To window.

To remove a link between two notes:

1. Select a note that you want to remove a link from.
2. Choose Notes > Show Links, or click Show Links in the toolbar to open the Links To window.
3. Select a note that you no longer want linked to the note previously selected.
4. Click Remove Link in the Links To window to remove the link.

To view linked notes:

When you select a note in the viewer window any notes that are linked to it will be listed in the Links To window if it's open, and the linked notes will be highlighted with a light tan color in the notes list. This makes it easy to

identify and open the linked notes.

Title	Folders	Modified	
Cookies	Recipes	Today 01:46 PM	4 items
Peanut-Butter Cookies	Recipes	Today 01:47 PM	2 items
Pizza	Recipes	Today 01:48 PM	1 items
Steak	Recipes	Today 01:48 PM	
Chocolate Chip Cookies	Recipes	Today 01:47 PM	1 items
Sugar Cookies	Recipes	Today 01:48 PM	1 items
Holiday Cookies	Recipes	Today 01:48 PM	1 items

The links column will show you the number of notes and contacts that are linked to a note.

When a note is selected, any notes that are linked to it will be highlighted with a light blue-gray color.

Note: You can change the color of link highlighting or disable it in the Appearance preferences (SOHO Notes > Preferences, and click the Appearance button).

Organize Notes

An effective way to organize your notes is to assign them to folders. For more information on folders see Chapter 8 *Creating And Working With Folders* on page 48.

When a note is created it is assigned to the folder that is currently selected. The note then can be assigned to additional folders or reassigned to another folder. To be clear, a single note can be in multiple folders at the same time.

To assign a note to an additional folder:

1. Select the note(s).
2. Choose Note > Add To, and then select a folder to assign the note to. You can also drag the note to the folder you want it assigned to. Repeat this step for each folder that you want the note assigned to.

To reassign a note to another folder:

1. Select the note(s).
2. Choose Note > Move To, and then select the folder you want the note assigned to. The note will no longer be assigned to the folder it was originally in.

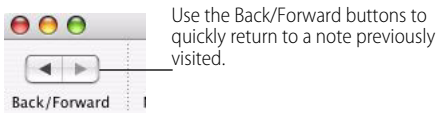
To remove a note from a folder:

1. Select the folder that the note is assigned to.
2. Select the note.
3. Choose Note > Move to Trash, or click Delete in the toolbar. A confirmation dialog will appear.
4. If the note is in more than one folder, click Remove to remove the note from the selected folder. The note will still exist and be in the other folder(s) to which it is assigned. If removing a note from a folder means that the note will no longer belong to any folder, then you will be asked if you want the note moved to the Trash.

Navigation History

As you navigate your notes, SOHO Notes will remember the notes you have visited. You can use the Forward/Back buttons in the toolbar to quickly go back to a note you have visited. Each open tab has its own navigation

history. For more information on the toolbar see *Toolbar* in Chapter *Using SOHO Notes* on page 24.



To return to a note previously visited:

1. Click the Back or Forward buttons in the toolbar until you get to the note you want. You can also click and hold the Back or Forward button to select a note from the menu that appears.

Delete Notes

A single note can be in more than one folder simultaneously. When a note is removed from the last folder it exists in, the note is moved to the Trash. For more information on removing a note from a folder see *To remove a note from a folder*: on page 44. If a note is in a single folder, permanently deleting the note is as simple as removing the note from that folder. If the note exists in multiple folders, it might be too cumbersome to remove the note from each folder separately. There is an easier way.

To permanently delete a note:

1. Select the All Notes folder in the folders drawer.
2. Select the note(s).
3. Choose Note > Move to Trash, or click Delete in the toolbar. A confirmation dialog will appear.
4. Click Delete to move the note to the Trash.
5. Choose SOHO Notes > Empty Trash to permanently delete all the notes in the Trash.

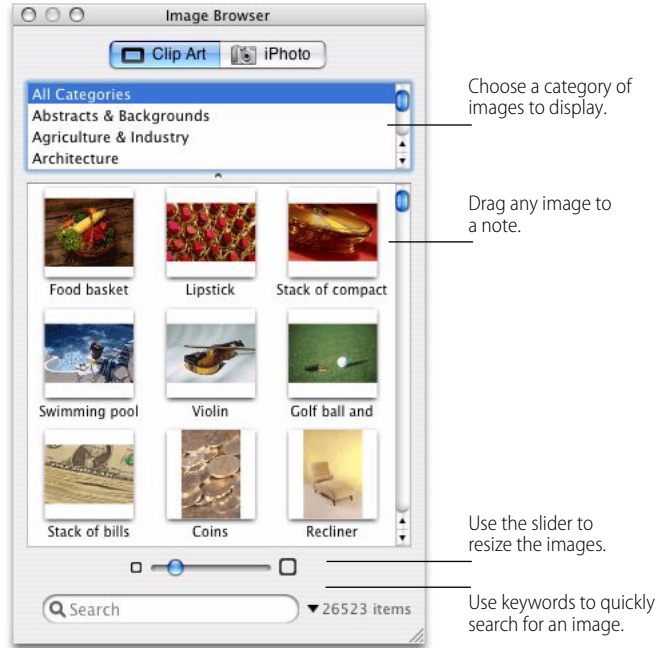
Contextual Menu

A contextual menu is available within the SOHO Notes application. This contextual menu is used to access common commands relating to notes such as Links, Note Info, Window Type, Background Texture, etc. To access the contextual menu, hold down the control key and click on a note. If you have a two button mouse, you can right-click on a note to open the contextual menu. The contextual menu can be accessed on a single selected note, an open note, or multiple selected notes. For example, you can select multiple notes in the viewer window and quickly change the Window Type of all the selected notes using the contextual menu.

Image Browser

The Image Browser will give you access to clip art graphics and your iPhoto photos (hereafter both will be referred to as images), so you can insert them into notes. You can search the clip art library by keywords and filter

by categories or browse your iPhoto albums to find just the right image to insert into a note.



To access the Image Browser:

1. Choose Window > Image Browser. The Image Browser window will appear on your screen.

To add an image to a note:

1. Open the Image Browser.
2. Click either Clip Art or iPhoto.
3. Locate the image you want to add to a note.
4. Drag the image from the Image Browser to the note.

To search for an image in the Clip Art:

1. Enter one or more keywords into the search field.

Every image has several keywords assigned to it. Control-click or right-click on an image to get a list of keywords assigned to it and to get additional information about the image. This will help you to know what keywords to use when searching for images.

Blog

A note can be posted to a blog very easily using the built-in blogging tools. In order to post a note to a blog you need to have an account with a web site that supports blogging such as <http://www.blogger.com> (the web site must support the Atom protocol for blogging). The blogging web site should provide you with the following information in order to publish entries to a blog:

- A URL that entries to a blog should be published to.
- A user name and password for your blogging account.
- The authentication method used to publish entries to a blog.

To set up your blogging account information:

Before you can publish an entry to a blog SOHO Notes will need to know your blogging account information. You can set up as many blogging accounts as you would like.

1. Choose SOHO Notes > Preferences, and click the Blogging button.
2. Click Add (+) to create a new account.
3. Enter in your blogging account information.

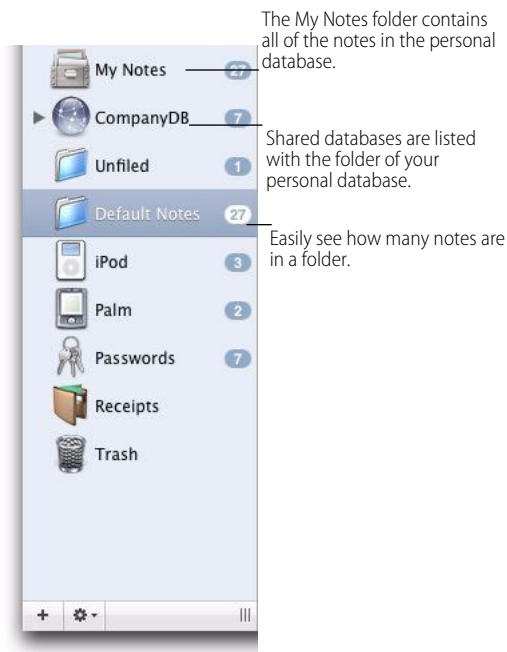
To post a note to a blog:

1. Select a note.
2. Choose Note > Post to Blog. The Post to Blog window will appear.
3. Choose your blogging account from the Account pop-up menu. Click Edit Accounts if you need to add or edit your blogging account.
4. Select a blog from the pop-up menu that you would like the note posted to.
5. Verify the contents of the note.
6. Click the Publish Post button to publish the note immediately to the blog.
7. Click the Save as Draft button to save the note a draft on the blogging server.

Chapter 8

Creating And Working With Folders

The main purpose of folders is to help you organize your notes. You can create an unlimited numbers of folders in your personal database and each of those folders can have any number of sub-folders. Folders and sub-folders can be reorganized and assigned their own icons and special settings. SOHO Notes even has some special pre-defined folders with unique functionality like the iPod, Palm, Passwords, and Receipts folders. Only the administrator can manage folders and sub-folders in a shared database.



Create a Folder or Sub-Folder

A folder can be created at the top level in the list of folders or it can be created within another folder. For example, you can create a folder named “Recipes” and within that folder create sub-folders named “Desserts” and “Main Dishes”.

The folders will be listed alphabetically except for a few special folders which will be discussed later in this chapter. You can assign an icon to each of your folders to help differentiate them from one another.

Note: only the administrator can create folders and sub-folders in a shared database.

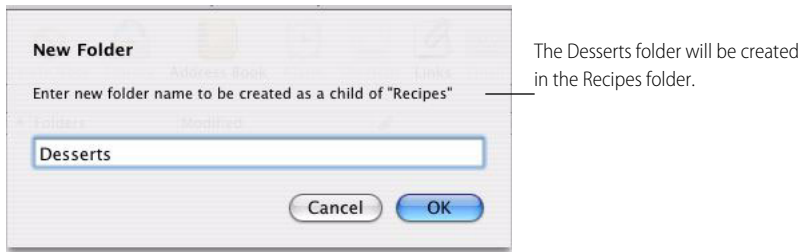
To create a folder:

1. Select a folder in the list if you want to create a sub-folder within it, or select the My Notes folder to create a folder at the top level.
2. Choose Folder > New, or click the Create Folder button at the bottom of the folder list.



3. Type the name of the new folder in the New Folder sheet. The sheet will let you know where the folder will

be created.



4. Click OK to create the folder.

To assign an icon to a folder:

1. Select a folder in the list.
2. Choose Folder > Change Icon, and select an icon from the pop-up menu.

To make the folder icons smaller:

Each icon that ships with SOHO Notes has a large and small form. By default, folder icons display in their large form.

1. Click the Action button at the bottom of the folders list.



2. Choose Use Small Folder Icons.

Repeat these steps to display the folder icons at their large size.

To change the note count style:

Next to each folder will be listed the number of notes that are in that folder. You can change the style of the note count.

1. Choose SOHO Notes > Preferences, and click the Appearance button.
2. Select a style from the Note count style popup menu.

To rename a folder:

1. Select a folder in the list.
2. Choose Folder > Rename.
3. Type a new name for the folder and then press the return key.

To delete a folder:

When you delete a folder all the notes in the folder and any nested folders will be deleted. When you delete a folder you will have the option to move the notes and nested folders to another folder.

1. Select a folder in the list.
2. Choose Folder > Delete.
3. Choose to delete the folder and all its contents, or move the contents to another folder. If the latter is selected, then choose a folder from the pop-up menu to move the contents to.
4. Click OK to save the changes.

To Open or Close all the notes in a folder:

This option is useful to quickly open or close all the notes in a particular folder.

1. Select a folder in the list.
2. Choose Folder > Open All Notes or Folder > Close All Notes.

Organize Folders

A folder can be located in the top level of the folders list or as a sub-folder to another folder. You can move folders any time you would like. The notes within the folder will move with it.

Note: only the administrator can organize folders and sub-folders in a shared database.

To move a folder to the top level of the folders list:

1. Drag and drop the folder to the My Notes folder.

To make a folder a sub-folder of another folder:

1. Drag and drop the folder on to the other folder.

Folder Info

The Folder Info window provides quick access to various settings that can be applied to a folder. In addition, it provides access to settings that can be applied to newly created notes in the folder. When a note is created in a folder, the note will inherit the settings of its folder. These settings include note color, window type, font style, etc.

Note: only the administrator can modify folders settings in a shared database.

**To access Folder Info:**

1. Select a folder in the folders list.
2. Choose Folder > Get Info.
3. Set the various settings for the selected folder. The settings are organized into three different tabs: General, Settings, and Background. For a description of each of the settings in the tabs see TABLE 2. “Folder Set-

tings”.

TABLE 2. Folder Settings

Attribute	Description
General	
Folder Name	This is the name of the folder.
Folder Icon	Use this setting to change the folder icon.
Folder Shortcut	Use this setting to assign a shortcut to the folder. A folder shortcut lets you conveniently grab information from another application and save it as a new note in the folder. For more information on shortcuts see Chapter 10 <i>Shortcuts</i> on page 57.
Settings	
Note Type	This is the default type that newly created notes will use. For more information on note types see Chapter 7 <i>Creating and Working with Notes</i> on page 27.
Width and Height	This is the default window size for newly created notes.
Privacy	This is the default private setting for newly created notes. For more information on using the private feature see Chapter 7 <i>Creating and Working with Notes</i> on page 42.
Default Font	This is the default font and font size that newly created notes will use. You can set the default font for newly created folders in the Appearance preferences.
Sticky Window Settings	These are the default settings for newly created notes. These setting will only work with notes of the sticky window type. The Window Opacity setting controls the translucency of the note window. This is useful for stickies that are floating in the foreground of your computer screen. The Floating Window setting will cause the note to float in the foreground of your computer screen to prevent it from being hidden by other windows.
Background	
Color	This is the default window color that newly created notes will use. For more information on window colors see Chapter 7 <i>Creating and Working with Notes</i> on page 28.
Texture	This is the default background texture for newly created notes. For more information on textures see Chapter 7 <i>Creating and Working with Notes</i> on page 29. This setting only works on notes that are of type Text, Pages, or Sticky.
Picture	This is the default background picture for newly created notes. For more information on pictures see Chapter 7 <i>Creating and Working with Notes</i> on page 29. This setting only works on notes that are of type Text, Pages, or Sticky.

Special Default Folders

SOHO Notes comes with a set of default folders that provide special functionality. These folders include My Notes, Unfiled, Daily Notes, Journal, iPod, Palm, Passwords, Receipts, and Trash. These folders can't be renamed; however, you can change the folder icon.

Because these folders offer special functionality in StickyBrain, if you delete one of them you will lose the special

functionality it provides (the All Notes, Unfiled, and Trash folders can't be deleted). To recreate a special folder, click the Action button at the bottom of the folders list and choose Recreate Default Folders. Any special folder that has been deleted will be restored.

All Notes Folder

The All Notes contains all of the notes in the database. The All Notes folder sits at the top of the folder list. Deleting notes from the All Notes folder will permanently delete the notes from the database. Whereas, deleting a note from a folder will only remove the note from the folder unless the note only exists in that folder in which case it is deleted.

Unfiled Folder

The Unfiled folder is the default folder that notes are assigned to if no folder is selected or if All Notes is selected when a new note is created.

Daily Notes

Notes that are created in the Daily Notes folder will have the title of the note automatically set to the current date. The format for the date will be based on the system date format. You can specify a custom date format in the Appearance preference pane.

To specify a custom date format:

1. Choose SOHO Notes > Preferences, and click the Appearance button.
2. Select Custom under Daily Notes Title Format.
3. Enter the custom date format in the Format field. For a definition of the various date format options see TABLE 3. "Custom Date Format Definitions".

Journal

Notes that are created in the Journal folder will have the title of the note automatically set to the current date. The format for the date will be based on the system date format. You can specify a custom date format in the Appearance preference pane.

To specify a custom date format:

1. Choose SOHO Notes > Preferences, and click the Appearance button.
2. Select Custom under Journal Title Format.
3. Enter the custom date format in the Format field. For a definition of the various date format options see TABLE 3. "Custom Date Format Definitions".

iPod Folder

Notes that are assigned to the iPod folder will synchronize to the iPod. For more information on iPod syncing see Chapter 15 *iPod Synchronization* on page 75.

Palm Folder

Notes that are assigned to the Palm folder will synchronize with a Palm handheld. For more information on Palm syncing see Chapter 16 *Palm Synchronization* on page 76.

Passwords Folder

The Passwords folder is used to store passwords and other sensitive information. The Passwords folder is used with the Lookup Password shortcut. When you use the Lookup Password shortcut to store a password for a web site, the information will be stored in the Passwords folder. For more information on using the Lookup Password shortcut see Chapter 10 *Shortcuts* on page 61.

Receipts Folder

The Receipts folder is used to store web receipts and other similar information. The Receipts folder is used with the Save in Receipts shortcut. When you use the Save in Receipts shortcut to store a receipt or other similar information, the information will be stored in the Receipts folder. For more information on using the Save in Receipts shortcut see Chapter 10 *Shortcuts* on page 62.

Trash Folder

The Trash folder is used to store notes that have been deleted. To empty the Trash choose SOHO Notes > Empty Trash. This will permanently delete the notes in the Trash folder from the database.

TABLE 3. Custom Date Format Definitions

Specifier	Definition
%%	A '%' character
%a	Abbreviated weekday name
%A	Full weekday name
%b	Abbreviated month name
%B	Full month name
%c	Shorthand for “%X %x”, the locale format for date and time
%d	Day of the month as a decimal number (01-31)
%e	Same as %d but does not print the leading 0 for days 1 through 9
%F	Milliseconds as a decimal number (000-999)
%H	Hour based on a 24-hour clock as a decimal number (00-23)
%I	Hour based on a 12-hour clock as a decimal number (01-12)
%j	Day of the year as a decimal number (001-366)
%m	Month as a decimal number (01-12)
%M	Minute as a decimal number (00-59)
%p	AM/PM designation for the locale
%S	Second as a decimal number (00-59)
%w	Weekday as a decimal number (0-6), where Sunday is 0
%x	Date using the date representation for the locale, including the time zone
%X	Time using the time representation for the locale
%y	Year without century (00-99)

TABLE 3. Custom Date Format Definitions

Specifier	Definition
%Y	Year with century (such as 1990)
%Z	Time zone name (such as Pacific Daylight Time)
%z	Time zone offset in hours and minutes from GMT (HHMM)

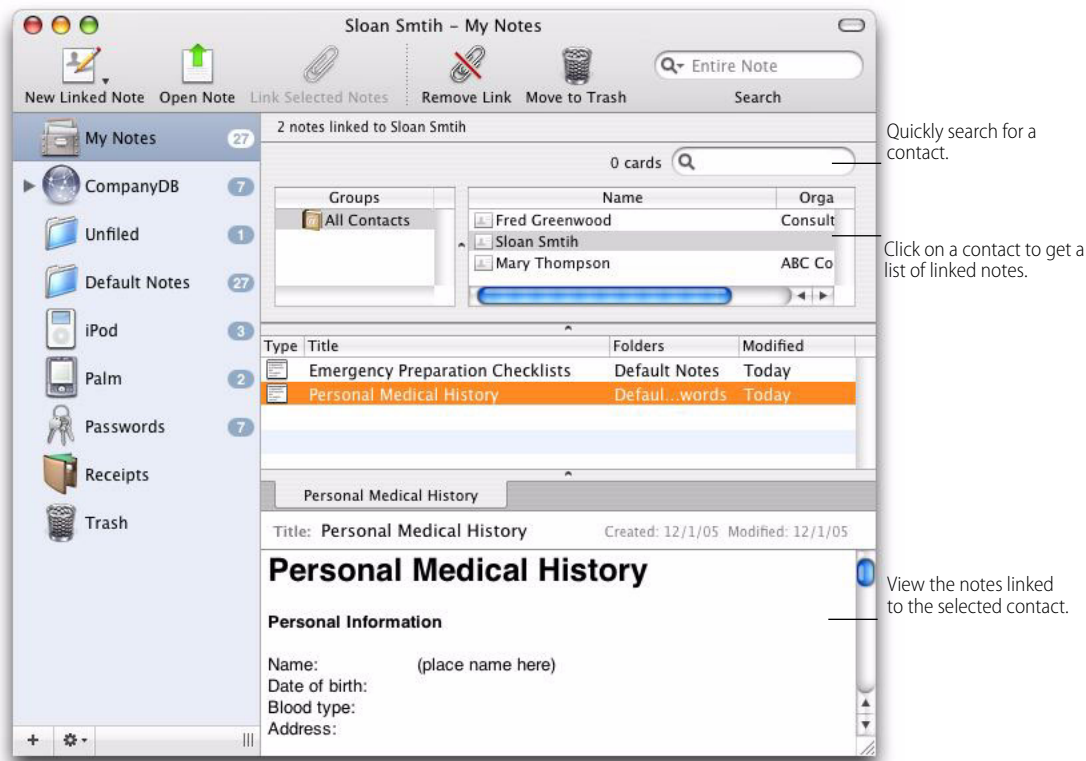
Chapter 9

Contacts

You can link notes in SOHO Notes to contacts in the same database. This is accomplished using the Contacts window in SOHO Notes. For example, you can link a note in your personal database to a contact in your personal database, but you can't link a note in your personal database to a contact in a shared database. The contacts in your personal database are automatically synchronized and will stay synchronized with the Mac OS X Address Book. This means your personal database will have the same contact information as the Mac OS X Address Book. For more information on contact synchronization see *Universal Synchronization* in Chapter *Universal Synchronization* on page 80.

Contacts Window

This section describes how to open and use the Contacts window.



To open the Contacts window:

1. Choose File > New Contacts Window, or click Contacts in the toolbar.

To link a new note to a contact:

1. Select a contact from the contact list.
2. Click New Linked Note in the toolbar to create a new note linked to the selected contact.

To link existing note(s) to a contact:

This requires a viewer window and the Contacts window to be open.

1. Choose File > New Viewer Window if the viewer window is not already open.
2. Select the note(s) you wish to link to a contact.
3. Choose File > New Contacts Window if the Contacts window is not already open.
4. Select a contact from the contact list to link to the selected notes in the viewer window.
5. Click Link Selected Notes in the toolbar of the Contacts window.

To link existing note(s) to a contact via drag and drop:

This requires a viewer window and the Contacts window to be open.

1. Choose File > New Viewer Window if the viewer window is not already open.
2. Choose File > New Contacts Window if the Contacts window is not already open.
3. Select a contact from the contact list to link to the selected notes in the viewer window.
4. Select and drag one or more notes from the viewer window to the notes list in the Contacts window to link the notes to the selected contact.

To view notes linked to a contact:

1. Select a contact from the contact list.
2. Any note linked to the selected contact will display in the notes list of the Contacts window.

To remove a link between a contact and note:

1. Select a contact from the contact list.
2. Select a linked note.
3. Click Remove Link in the toolbar to remove the link. This will only remove the link between the contact and the note. The contact and the note will not be deleted.

Chapter 10

Shortcuts

A powerful feature in SOHO Notes is its integration with other software on your computer. SOHO Notes can grab content from other applications into a note, paste note content into other applications, do website password lookups, and other powerful actions. SOHO Notes executes these actions via shortcuts which can be performed whether SOHO Notes is running or not. There are three different and convenient ways to invoke a shortcut:

- The SOHO Notes contextual menu.
- The SOHO Notes services menu.
- A hot key.

Shortcuts can be assigned to both notes and folders in your personal database. There are also some shortcuts for special SOHO Notes features. This chapter will describe how to assign a shortcuts and then how to invoke the shortcut once it is assigned.

Note: shortcuts are only available for your personal database, not shared databases.

Assign a Special Shortcut

There are several special features in SOHO Notes that can have shortcuts assigned to them to make them more convenient. These features are listed in TABLE 4. “Special Feature Action Definitions”.

TABLE 4. Special Feature Action Definitions

Action	Definition
Launch SOHO Notes	Launches SOHO Notes from any application.
Search	Searches in SOHO Notes for the text selection in any application. The results appear in the FlashNote. For more information on FlashNote, see Chapter 11 <i>FlashNote, QuickNote, and DockNote</i> on page 64.
Lookup Password	Looks up in SOHO Notes the user name and password for the current page in your web browser. If it finds the user name and password, it displays it in FlashNote. Otherwise, it creates a new note in your Passwords folder so you can enter your user name and password for the webpage.
Save in Receipts	Saves the selected text and graphics in any application to a new note in your receipts folder. Useful for storing web receipts.

To assign a shortcut to one of the special SOHO Notes features:

Note: shortcuts can only be assigned in your personal database, not shared databases.

1. Choose SOHO Notes > Preferences, and click the Shortcuts button.
2. Double-click or the click the “i” button next to the shortcut you wish to assign a hot key to.
3. Enter a new hot key or click Clear to delete the existing hot key.

Assign a Note Shortcut

You can assign a shortcut to any note in your database. A note shortcut will allow you to quickly and easily paste

the note content into another application or grab and append content from another application into the note.

To assign a shortcut to a note:

Note: shortcuts can only be assigned to notes in your personal database, not shared databases.

1. Select a note.
2. Choose Note > Edit Shortcut, or click Edit Shortcut in the toolbar to open the Note Shortcut sheet.
3. Click the Action pop-up menu to assign an action to the shortcut. The various actions that you can assign to a shortcut are listed in TABLE 5. “Note Action Definitions”.

TABLE 5. Note Action Definitions

Action	Definition
No Action	This default indicates no action is associated with the note shortcut.
Grab Selection	This action will grab/copy the selection from the current application and append it to the end of the note.
Grab Selection (No Style)	This action will grab/copy the selection from the current application and append it as plain text to the end of the note using the current font of the note.
Paste Note	This action will paste the contents of the note into the current application.
Paste Note (No Style)	This action will paste the contents of the note into the current application as plain text.

4. Enter a new hot key (this is optional). Click Clear to delete the existing hot key. A hot key is a special key combination that executes the action assigned to the shortcut. An example hot key is Command-Option-B.

If you need to see which notes have been assigned a shortcut choose StickyBrain > Preferences, and click the Shortcut button. The Shortcut preference pane will let you see and change any shortcut that has been assigned to a note, folder, etc.

Assign a Folder Shortcut

You can assign a shortcut to any folder in your database. A folder shortcut lets you conveniently grab information from another application and save it as a new note in the folder.

To assign a shortcut to a folder:

Note: shortcuts can only be assigned to folders in your personal database, not shared databases.

1. Select a folder in the folders list.
2. Choose Folder > Edit Shortcut, or click the Action button at the bottom of the folders list and choose Edit Shortcut.
3. Click the Action pop-up menu to assign an action to the shortcut. The various actions that you can assign

to a folder shortcut are listed in TABLE 6. “Folder Action Definitions”.

TABLE 6. Folder Action Definitions

Action	Definition
No Action	The selected folder will not appear in the SOHO Notes Grab To menus.
Grab Selection	This action will grab the selection from the current application and save it as a new note in the folder.
Grab Selection (No Style)	This action will grab the selection from the current application and save it as plain text in a new note in the folder using the default font of the folder.

4. Enter a new hot key (this is optional). Click Clear to delete the existing hot key. A hot key is a special key combination that executes the action assigned to the shortcut. An example hot key is Command-Option-B.

If you need to see which folders have been assigned a shortcut choose StickyBrain > Preferences, and click the Shortcut button. The Shortcut preference pane will let you see and change any shortcut that has been assigned to a note, folder, etc.

Invoke A Shortcut Via The SOHO Notes Contextual Menu

Mac OS X provides a system-wide contextual menu system that can be accessed in any application that supports it. The contextual menu system works by displaying a pop-up menu of context-sensitive commands. The contextual menu is invoked in applications by control-clicking or right-clicking on text, graphics, etc.

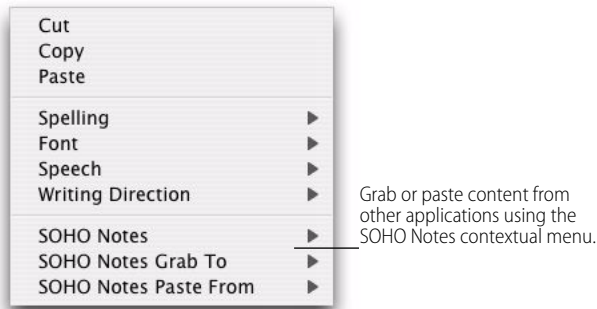
Note: It should be noted that some applications use their own contextual menu systems which are not compatible with the standard Mac OS X contextual menu system. The SOHO Notes contextual menu will not work in such cases. This is not a deficiency of the SOHO Notes contextual menu since those are custom and private systems. Fortunately, SOHO Notes provides alternative methods for invoking shortcuts such as the SOHO Notes services menu and hot keys.

To access the SOHO Notes contextual menu in another application:

The SOHO Notes contextual menu can be accessed in any application that supports the Mac OS X contextual menu system. The contextual menu will only show SOHO Notes shortcuts that are applicable to the task at hand. For example, if you have text selected in your word processor and you access the contextual menu, you will see SOHO Notes shortcuts to grab the text, search for the text in SOHO Notes, etc.

1. Switch to another application such as a word processor, web browser, e-mail client, etc.
2. Select some text, graphics, etc. that you wish to grab or place the text cursor where you'd like to paste a note.
3. Hold down the control key and click to access the contextual menu. If you have a two button mouse, you

can right-click to access the contextual menu.



4. Choose a shortcut in the SOHO Notes, SOHO Notes Grab To, or SOHO Notes Paste From sub-menus. Some of these sub-menus may not appear if it doesn't make sense contextually. For example, if you don't have anything selected, the SOHO Notes Grab To sub-menu won't appear.

Invoke A Shortcut Via The SOHO Notes Services Menu

Mac OS X provides a system-wide Services menu that can be accessed in any application that supports it. The Services menu is located in every application's application menu. The Services menu works by displaying context-sensitive commands provided by different applications including SOHO Notes.

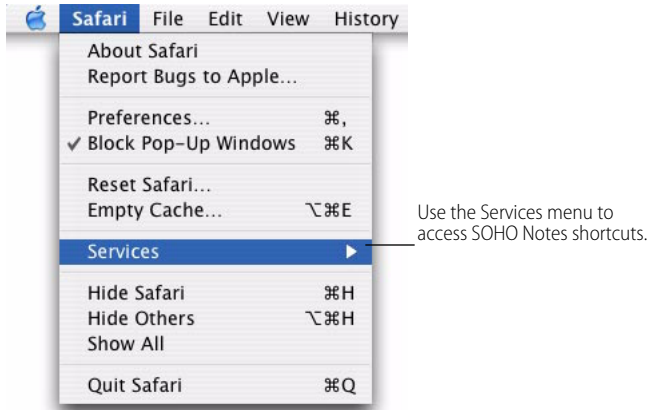
Note: Not all Mac OS X applications support the Services menu. If all of the menu items in the Services menu are disabled despite a text or graphics selection in an application, this usually indicates the application doesn't support the Services menu. If an application does not support the Services menu, then the SOHO Notes Service menu will not work. This is not a deficiency of SOHO Notes. Fortunately, SOHO Notes provides alternative methods for invoking shortcuts such as the SOHO Notes contextual menu and hot keys.

To access the SOHO Notes service in another application:

The SOHO Notes service menu can be accessed in any application that supports services. For more information on application services, switch to the Finder and choose Help > Mac Help.

1. Switch to another application such as a word processor, web browser, e-mail client, etc.
2. Select some text, graphics, etc. that you wish to grab or place the text cursor where you'd like to paste a note.
3. Choose Application Menu > Services, where Application Menu is the name of the application you're currently in.
4. Choose a shortcut in the SOHO Notes, SOHO Notes Grab To, or SOHO Notes Paste From sub-menus. The menu items in some of these sub-menus may be disabled if it doesn't make sense contextually. For example, if you don't have anything selected, the menu items in the SOHO Notes Grab To sub-menu will be

disabled.



Invoke a Shortcut Via A Hot Key

SOHO Notes hot keys are similar to the keyboard shortcuts used in almost every Macintosh application. A hot key is a special key combination that performs a shortcut. Each shortcut in SOHO Notes can be assigned an optional hot key to quickly and easily invoke the shortcut without taking your hands off the keyboard. Using a hot key is also useful for those applications that don't support contextual menus or the Services menu.

To invoke a shortcut using a hot key:

1. Press the keys that comprise the hot key. For example, hold down the Command key and the Option key then press B if the hot key is Command-Option-B.

Shortcuts In Action

The SOHO Notes shortcuts are divided into three categories in the contextual and Services menus: SOHO Notes, SOHO Notes Grab To, and SOHO Notes Paste From. This section will describe what each shortcut does and how to use it.

SOHO Notes > Launch

This shortcut will launch SOHO Notes. This shortcut is only available in the Services menu.

To use Launch:

1. Choose SOHO Notes > Launch from the Services menu. SOHO Notes will launch if it isn't running or will bring SOHO Notes to the foreground if it's already running.

SOHO Notes > Lookup Password

This shortcut can easily save and retrieve Internet passwords. For example, suppose that you've just created an account on eBay which requires a user name and password whenever you log in. Rather than try to remember your user name and password, you can have SOHO Notes do it for you.

To use Lookup Password:

1. Launch your web browser and open the webpage where you normally enter your user name and password.
2. Make sure that the address of the page is selected in the browser window.
3. Choose SOHO Notes > Lookup Password from either the contextual or Services menu.

4. SOHO Notes will search your Passwords folder for a note matching the web address.
5. If SOHO Notes locates a matching note, it will open the note in the FlashNote window so you can access your user name and password. For more information on FlashNote see Chapter 11 *FlashNote, QuickNote, and DockNote* on page 64.
6. If SOHO Notes doesn't locate a note for the webpage, SOHO Notes will open if it's not already running and create a new note for the web address. You can then enter your user name and password for that webpage and save them for future reference.

SOHO Notes > Save in Receipts

This shortcut is used to store web receipts and other similar information in the Receipts folder.

To use Save in Receipts:

1. Select the receipt or other similar content you want to save into the Receipts folder.
2. Choose SOHO Notes > Save in Receipts from either the contextual or Services menu. SOHO Notes will save the selected content as a new note in the Receipts folder.

SOHO Notes > Search

This shortcut will allow you to search for text in SOHO Notes from selected text in another application.

To use Search:

1. Select a word or phrase in an application.
2. Choose SOHO Notes > Search from either the contextual or Services menu. FlashNote will open and immediately search for the selected word or phrase. For more information on using FlashNote see Chapter 11 *FlashNote, QuickNote, and DockNote* on page 64.

SOHO Notes Grab To

The SOHO Notes Grab To shortcut will allow you to grab content from other applications into SOHO Notes. The SOHO Notes Grab To menu will list the folders and notes that have been assigned the action Grab Text or Grab Text (No Style). For notes, the menu will list the name of the note along with the name of the folder the note is assigned to. For folders, the menu will list the name of the folder.

To grab content from another application:

1. Select the content you want to grab from the application you're working in.
2. Choose SOHO Notes Grab from the contextual or Services menu.
3. Choose a folder or note from the menu. If a note is chosen the selected content will be appended to the end of the note. If a folder is chosen the selected content will be saved as a new note in the folder.

SOHO Notes will play the grab selection sound when content is being grabbed. You can change the grab selection sound or turn it off in the General preferences (SOHO Notes > Preferences, and click the General button).

SOHO Notes Paste From

The SOHO Notes Paste From shortcut will allow you to paste frequently used notes into other applications. The SOHO Notes Paste From shortcut will list the notes that have assigned the action Paste Note or Paste Note (No Style).

To paste a note into another application:

1. Place the cursor where you want a note pasted.
2. Choose SOHO Notes Paste From from the contextual or Services menu.

3. Choose a note that you want to paste into the application.

SOHO Notes will play the paste note sound when it is pasting the note into the target application. You can change the paste note sound or turn it off in the General preferences (SOHO Notes > Preferences, and click the General button).

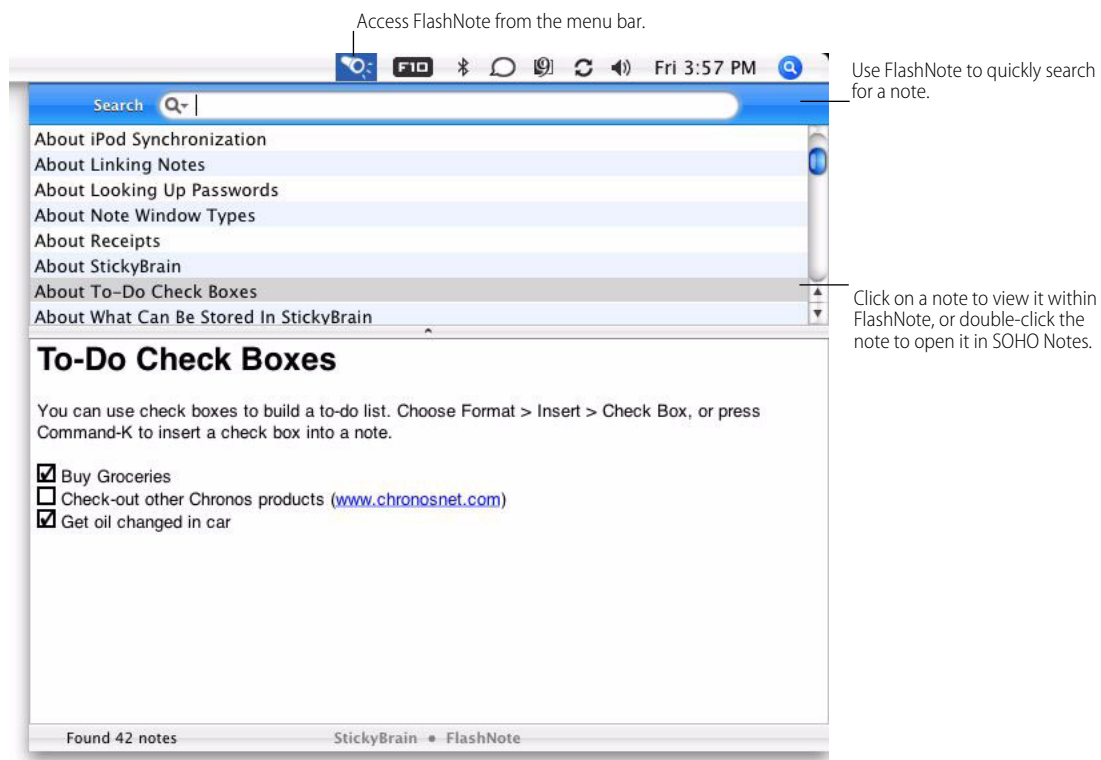
Chapter 11

FlashNote, QuickNote, and DockNote

This chapter will discuss FlashNote, QuickNote, and DockNote.

FlashNote

FlashNote is a powerful feature that lets you search and view notes in your personal database whether SOHO Notes is running or not. It also works in conjunction with other features such as the Lookup Passwords and Search shortcuts. For more information on these shortcuts see Chapter 10 *Shortcuts* on page 57.



To access FlashNote:

FlashNote can be accessed one of two ways:

- Click the FlashNote menu bar icon.
- Press the FlashNote hot key. The FlashNote hot key can be set up in the Shortcuts preferences (SOHO Notes > Preferences, and click the Shortcuts button).

When you access FlashNote, the FlashNote window will appear below the menu bar.

To remove FlashNote from the menu bar and switch to standalone window mode:

FlashNote can be accessed in standalone window mode, which simply means that the FlashNote window is not attached to the menu bar and it can be moved and resized anywhere on the screen. In order to use FlashNote in standalone window mode you simply turn off the FlashNote icon in the menu bar.

1. Choose SOHO Notes > Preferences, and click the Services button.
2. Deselect the Show in menu bar button.

Once you have FlashNote in standalone window mode, you access it via its hot key.

To make the FlashNote window float:

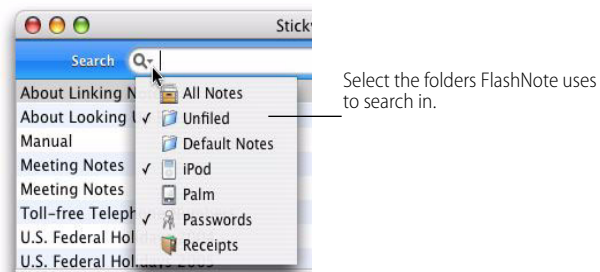
The FlashNote window can be made to float in the foreground of your computer screen to prevent it from being hidden by other windows. This setting only applies if you're accessing FlashNote in standalone window mode.

1. Choose SOHO Notes > Preferences, and click the Services button.
2. Select Make Floating in the FlashNote section.

To control which folders FlashNote searches and displays:

FlashNote, by default, searches and displays all the notes in the SOHO Notes database. You can optionally limit your searches and display to folders of your choice.

1. Click the Search field pop-up menu and select a folder. Repeat this step for each folder you want to select or deselect.



To search for a note:

1. Click in the Search field at the top of the FlashNote window.
2. Type the text you wish to search for. When you stop typing FlashNote will begin the search.

To view a note:

1. Select a note to view its contents.

Once a note is selected, you may copy and paste its contents into other applications.

To open a note in SOHO Notes:

If you wish to edit a note, you'll have to open it in SOHO Notes.

1. Select a note.
2. Double-click the note, press the Return key, or press Command-O to open the note in SOHO Notes. This will launch SOHO Notes if it's not running and open the note.

To change the FlashNote window style:

The FlashNote window can appear in any of several different window styles.

1. Choose SOHO Notes > Preferences, and click the Services button.
2. Click the Window style button and choose a new window style.

To close the FlashNote window:

The FlashNote window will automatically close if you double-click a note to open it in SOHO Notes or if you

click anywhere outside of the FlashNote window. Otherwise, you can use one of the following options to close the FlashNote window:

- Click the FlashNote menu bar icon.
- Press the escape key.
- Press the FlashNote hot key.

If FlashNote is in standalone window mode, you can close it using the below methods:

- Click the close window button in the window title bar.
- Press the escape key.
- Press the FlashNote hot key.

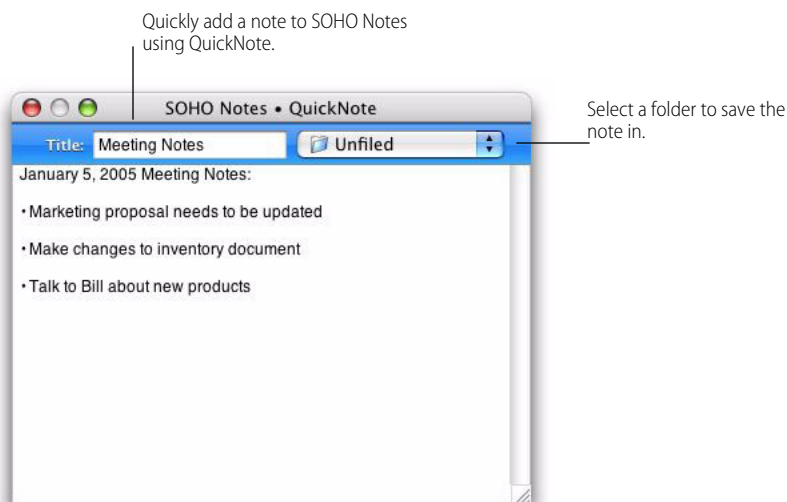
QuickNote

QuickNote provides a fast and easy way to add a note to your personal database regardless of what application you're currently working in. In fact, SOHO Notes doesn't even have to be running.

To use QuickNote:

When you access QuickNote, the QuickNote window will appear on your screen. You can use this window to add a note into SOHO Notes. The window style that is used for the QuickNote window is the same one used for the FlashNote window. For more information on FlashNote see Chapter 11 *FlashNote, QuickNote, and DockNote* on page 64.

1. Press the QuickNote hot key. The QuickNote hot key can be set up in the Shortcuts preferences (SOHO Notes > Preferences, and click the Shortcuts button).



2. Type a title for the note in the Title field.
3. Add the appropriate content to the main body.
4. Select a folder to save the note in from the pop-up menu. You can change the default folder notes are saved into in the Services preferences (SOHO Notes > Preferences, and click the Services button).
5. To save the note either close the QuickNote window or press Command-S.

To make the QuickNote window float:

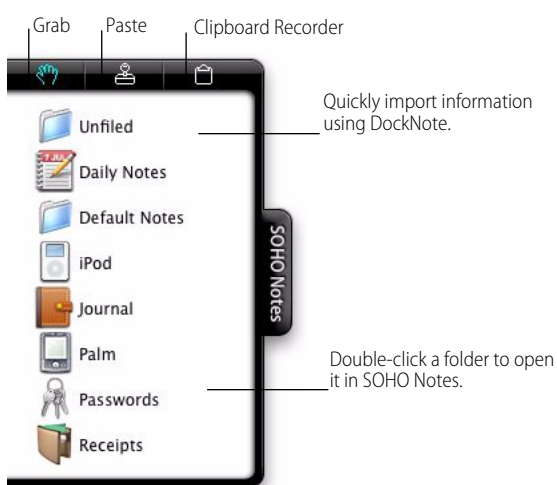
The QuickNote window can be made to float in the foreground of your computer screen to prevent it from being hidden by other windows.

1. Choose SOHO Notes > Preferences, and click the Services button.
2. Select Make Floating in the QuickNote section.

DockNote

DockNote appears on the edge of your screen and has three tabs where each tab provides access to a convenient time-saving feature.

1. **Grab.** Drag and drop text, images, URL's, pdf's, etc. from other applications to DockNote to create new notes in SOHO Notes.
2. **Paste.** Paste the content of frequently used notes into other applications.
3. **Clipboard Recorder.** Records everything copied to the system-wide clipboard (whenever you press Command-C or choose Edit > Copy in any application) so you can easily reuse these clippings and create notes from them.



To enable/disable and set various preferences for DockNote:

1. Choose SOHO Notes > Preferences, and click the Services button.
2. Select Enable DockNote in the DockNote section. Repeat this step to disable DockNote.
3. Select Dock Tab or Screen Edge. If you choose Dock Tab, the DockNote window will open when you drag an item directly to the tab. If you choose Screen Edge, the DockNote window will open when you drag an item to the edge of the screen the tab is located at.
4. Choose a screen position the DockNote tab should appear from the Position button pop-up menu.
5. Use the width slider to control the width of the DockNote window when it's opened.
6. Choose which folders appear in the Grab section.

To grab items such as text, images, URL's, pdf's, etc.:

1. Click the DockNote tab on the edge of the screen.
2. Click the Grab button at the top of the DockNote window.
3. Drag and drop the item on the folder you want it imported into. Optionally, you can drag the item to the DockNote tab or screen edge and the DockNote will automatically open and you can drop the item on the folder you want it imported into.

SOHO Notes will play the grab selection sound when the item is being imported. You can change the grab se-

lection sound or turn it off in the General preferences (SOHO Notes > Preferences, and click the General button).

Note: When you import/grab a URL a Bookmark note will be created by default. You can choose to have a Web Archive note created by default instead. Choose SOHO Notes > Preferences, and click the General button. Under URL Handling select Web Archive notes.

To paste frequently used notes into other applications:

Any note that is assigned a Shortcut with the action Paste From will be available from DockNote. You will be able to quickly paste the contents of a note into any application. For more information on Shortcuts see *Assign a Note Shortcut* in Chapter *Shortcuts* on page 57.

1. Place the cursor in any application where you want a note pasted.
2. Click the DockNote tab on the edge of the screen.
3. Click the Paste button at the top of the DockNote window.
4. Click the button next to a note or double-click the note to paste it in the current application.

SOHO Notes will play the paste note sound when it is pasting the note into the target application. You can change the paste note sound or turn it off in the General preferences (SOHO Notes > Preferences, and click the General button).

To use the clipboard recorder:

The clipboard recorder will remember everything copied to the system-wide clipboard (whenever you press Command-C or choose Edit > Copy in any application). It will also remember everything copied between computer restarts, so you can literally go back weeks in time to find something that you copied. Each item the clipboard recorder records is called a clipping. You can open, edit, and delete individual clippings, create new notes from clippings, and replace clippings with the current selection in an application.

1. Click the DockNote tab on the edge of the screen.
2. Click the Clipboard button at the top of the DockNote window.
3. Click the Turn Off button to stop the clipboard recorder.
4. Click the Clear button to delete all clippings currently in the recorder history.
5. Drag and drop a clipping into any application that will accept the clipping.
6. Move the mouse over a clipping. A transparent control bar will appear over the clipping. The control bar will have four buttons on it.



7. The first button will replace the clipping with the selection in the application you're working in.
8. The second button will paste the clipping into the application you're working in. You'll need to place the cursor in the application where you want the clipping to be pasted in at.
9. The third button will allow you to open, edit, or delete the clipping. If the clipping is text it will be opened in TextEdit, otherwise the clipping will be opened in Preview. Only text clippings will be editable.
10. The fourth button will create a new note in SOHO Notes from the clipping. The new note will be created in the Unfiled folder.

Note: The clippings are stored in a file named "CHClipboardData" which is located in the following directory on your computer: ~/Library/Application Support/Chronos/Chronos Notes/. Where "~" denotes your home folder.

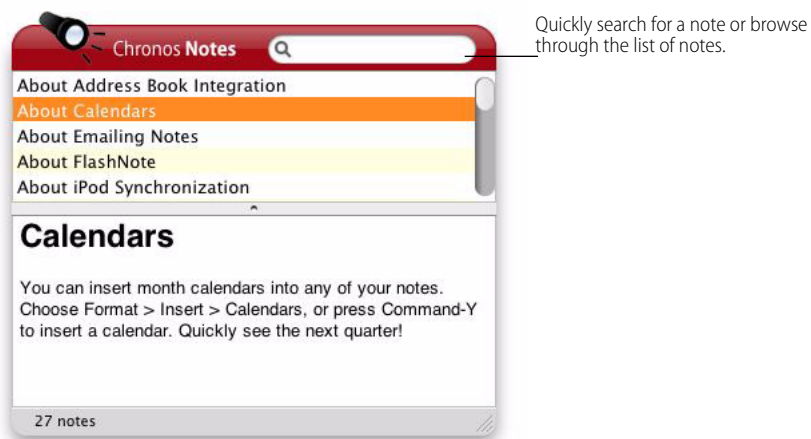
Chapter 12

Dashboard Widget

The ChronosNotes widget lets you search and view notes in your personal database using Apple's Dashboard feature. To learn more about Dashboard, visit <http://www.apple.com>.

To use the ChronosNotes widget:

The ChronosNotes widget will display all of the notes in the SOHO Notes database. You can use the search field to search for a note, or you can browse your notes one at a time. In addition, the contents of a note in the ChronosNotes widget window can be copied and pasted into other applications. Notes can't be edited in the ChronosNotes widget window.



To open a note in SOHO Notes:

If you wish to edit a note, you'll have to open it in SOHO Notes.

1. Select a note.
2. Double-click the note to open the note in SOHO Notes. This will launch SOHO Notes if it's not running and open the note.

Chapter 13

Printing

You can print notes one at a time or several notes at once. This chapter will discuss how to set up notes for printing and how to print notes. Only Text, Pages, or Sticky notes can be printed.

Print Setup

Every note has a set of margins that are used when a note is printed. This section will describe how to change these margins if desired. This section will also describe how to disable the printing of the background (textures, pictures, etc.) if so desired.

To set the margins for a note:

1. Select a note.
2. Choose Note > Get Info, and click the Margins tab to set the margin settings.

To set the default margins that will be used when a new note is created:

1. Choose SOHO Notes > Preferences, and click the General button.
2. Click the Units pop-up menu and select a unit of measurement.
3. Enter each of the default margin settings you would like all newly created notes to use.

To enable or disable background printing:

SOHO Notes lets you assign different backgrounds to notes such as colors, textures, or pictures. You can choose if the background should be printed with the note.

1. Choose SOHO Notes > Preferences, and click the General button.
2. Enable or Disable the Print Background button.

Print Note(s)

To print a single note:

1. Select the note you wish to print.
2. Choose File > Print.

To print multiple notes:

1. Choose File > Print Notes. This will open the Print Notes dialog which has the following options:
 - **Selected Notes.** This option will print all notes that are selected.
 - **All Open Notes.** This option will print all open notes.
 - **All notes in the “name of folder” folder.** This option will print all notes in the selected folder.
 - **All Notes.** This option will print all of your notes.
2. Select a print option from the Print Notes dialog.
3. Click OK.

Chapter 14

Miscellaneous

This chapter will describe how to import and export notes, create database backups, and manage the Service helper application that supports SOHO Notes.

Import Notes

SOHO Notes can import RTF, RTFD, basic Microsoft Word (.doc)*, HTML*, and plain text files (hereafter, these file types will be referred to as text files). In addition, SOHO Notes can import the sticky notes from Apple Stickies.

* Does not support all formatting features.

To import text file(s):

SOHO Notes can import a single text file or a folder containing multiple text files.

1. Select a folder in the folders drawer that you would like the imported note(s) to be assigned to.
2. Choose File > Import Notes.
3. Select “A text or rich text file” from the Import dialog, then click OK.
4. Choose a folder that contains text files, or select an individual text file.
5. Click Open to import the file(s). A new note will be created for each text file that is imported in the selected folder.

To import text file(s) via drag & drop:

1. Select a folder that contains text files, or select an individual text file in the Finder.
2. Drag the folder or text file from the Finder and drop it on the folder drawer in SOHO Notes. The folder and all of the notes in the folder will automatically be imported into SOHO Notes. All sub-folders and their contents will likewise be imported such that the original folder hierarchy is preserved.

To import sticky notes from Apple Stickies:

1. Select a folder in the folders drawer that you would like the imported sticky note(s) to be assigned to.
2. Choose File > Import Notes, and then select “My Apple Stickies”.
3. Click OK to import the sticky notes from Apple Stickies.

Export Notes

SOHO Notes can export notes to a rich text or plain text file. In addition, SOHO Notes can export a whole folder of notes including any sub-folders of notes.

To export note(s) to a text file:

1. Select the note(s) you wish to export. Hold down the shift key to select multiple contiguous notes. Hold down the command key to select multiple notes in a non-contiguous fashion.
2. Choose File > Export Notes.
3. If a single note is being exported, a save dialog will appear where you can choose the format and location for

the exported note.

4. If multiple notes are being exported, select to have them exported to a single text file or individual text files (one file for each note). Then click OK and choose the format and location for the exported notes.
5. Type a name for the export file if you're exporting a single note or multiple notes into a single text file.
6. Click Export to export the note(s).

To export note(s) via drag & drop:

1. Select a folder or select individual text file(s).
2. Drag the folder or individual text file(s) to the Finder and drop them. The folder or individual text file(s) will be exported as individual folders and files in the Finder. All sub-folders and their contents will be exported such that the original folder hierarchy is preserved.

To export a folder of notes:

1. Select a folder you wish to export.
2. Choose File > Export Notes.
3. Notes can be exported into a single text file or individual text files (one file for each note).
4. If the "Export notes in sub-folders" check box is selected, the notes in the selected folder and all of its sub-folders will be exported. If the notes are being exported as individual files, the folder hierarchy will be preserved.
5. Click OK. A save dialog will appear where you can choose the format and location for the exported notes.
6. Click Export to export the folder of notes.

Personal Database Backups

SOHO Notes can make regular backups of your personal database which contains all of your notes. This is a safety feature in case you inadvertently delete some important information and need to restore a backup file, which is very easy to do. For information on shared database backups see *.Mac Backup* on page 73.

WARNING: Depending upon which of Chronos' integrated suite of products you own, your database may contain notes, contacts, and calendars. When you back up a database, all notes, contacts, and calendars in the database are backed up. Likewise, if you later restoring a database backup, it will completely replace the notes, contacts, and calendars on your computer with those in the backup.

To set the backup preferences:

1. Choose SOHO Notes > Preferences, and click the Backups button.
2. Set the various backup options:
 - **Automatically perform backups.** This option lets you choose how often SOHO Notes should make a backup. By default, backups will be created on a daily basis.
 - **Maximum number of backups to keep.** Enter the maximum number of backups to keep. When a new backup file is created, the oldest backup file will be deleted so that the maximum number of backup files won't be exceeded. To permanently save a particular backup file, you must move it outside of the backup folder or it will eventually be deleted.
 - **Location for backups.** By default, backup files are saved in the directory: ~/Library/Application Support/Chronos/Backups/, where "~" denotes your home folder. Click Choose Backup Location to select a different backup folder.

To manually make a backup of your personal database:

1. Choose File > Back Up Database > To a File.

2. Name the backup file and choose where it should be saved to.
3. Click Save to save the backup file.

To undo all recent changes and return to a database backup:

1. Choose File > Restore Database > From a File.
2. Select a backup file from the Open dialog.
3. Click Open to restore the database backup.

Any new notes, contacts, calendars, etc. that you've changed since the backup was created will be lost. Any deleted items will be recovered. If you want to keep the notes that are currently in the SOHO Notes database you will need to export them to a text file and then later import them back into SOHO Notes. For more information on importing and exporting see Chapter 14 *Miscellaneous* on page 71.

.Mac Backup

If you have a .Mac account with Apple, SOHO Notes can make a backup of your personal database to your iDisk, and then later restore the database backup. In addition, you can use your .Mac backup feature to move your personal database between multiple computers. In order to use the .Mac backup feature, you will need a .Mac account from Apple. For more information on obtaining a .Mac account see <http://www.chronosnet.com/dot-macaccount.html>.

WARNING: Depending upon which of Chronos' integrated suite of products you own, your database may contain notes, contacts, and calendars. When you back up a database, all notes, contacts, and calendars in the database are backed up. Likewise, if you later restoring a database backup, it will completely replace the notes, contacts, and calendars on your computer with those in the backup.

To make a backup of your SOHO Notes database to .Mac:

1. Choose File > Back Up Database > To .Mac, or click .Mac in the toolbar and click Back up to .Mac from the dialog.

A backup of your personal database will be created in the following directory on your iDisk: /Documents/Chronos/

To undo all recent changes and return to your last backup on .Mac:

1. Choose File > Restore Database > From .Mac, or click .Mac in the toolbar and click Restore from .Mac from the dialog. Any new notes or information you've changed since you last created a backup will be lost. Any deleted items will be recovered.

To move a database between multiple computers:

You can use the .Mac backup feature to move your SOHO Notes database between multiple computers. Please note that moving your personal database between computers is different than synchronizing your data between computers. The following example will show you how to move your database between a home computer and a work computer.

Before you leave to work, sit down at your home computer and do the following:

1. Launch SOHO Notes.
2. Choose File > Back Up Database > To .Mac, or click .Mac in the toolbar and click Back up to .Mac from the dialog.

Once you arrive at work, do the following on your work computer:

1. Launch SOHO Notes.
2. Choose File > Restore Database > From .Mac, or click .Mac in the toolbar and click Restore from .Mac from

the dialog. This will replace the database on your work computer with the database from your home computer. Please note that restoring a backup does not synchronize your notes. Rather, it overwrites your notes with those in the backup.

When you're ready to take the database back to your home computer, do the previous steps again but this time you'll be starting out on your work computer instead of your home computer.

WARNING: Depending upon which of Chronos' integrated suite of products you own, your database may contain notes, contacts, and calendars. When you back up a database, all notes, contacts, and calendars in the database are backed up. Likewise, if you later restoring a database backup, it will completely replace the notes, contacts, and calendars on your computer with those in the backup.

Service Preference

SOHO Notes has a helper application called ChronosNotesService. This faceless background application is required in order to use the SOHO Notes contextual and Services menus as well as FlashNote, QuickNote, etc. The ChronosNotesService application is automatically added to the Startup Items when you first launch SOHO Notes. Under normal circumstances, you will never need to disable the ChronosNotesService application but should you ever need to, the Service preference allows you to enable or disable the ChronosNotesService application and add it to the Startup Items.

To enable or disable the ChronosNotesService application:

1. Choose SOHO Notes > Preferences, and click the Service button.
2. Enable or Disable the Service button.

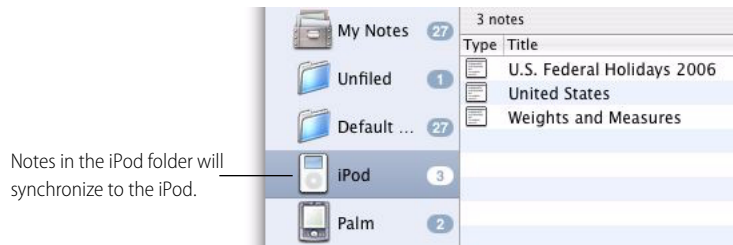
To add the ChronosNotesService to the Startup Items:

1. Choose SOHO Notes > Preferences, and click the Service button.
2. Select the Enable at system startup button.

Chapter 15

iPod Synchronization

Notes in your personal database can be synchronized with your iPod. This makes it possible to take some or all of your notes with you on the road. All of the notes in your iPod folder are automatically synced to your iPod whenever you perform a synchronization.



This chapter will describe how to make sure your iPod is set up for synchronization and will describe how to perform a synchronization.

iPod Requirements And Setup

iPod synchronization requires a third generation iPod (3G) or newer, iPod Mini, or iPod Nano. See Apple's web site or your iPod manual to find out what generation of iPod you have. In order for SOHO Notes to synchronize notes to the iPod, the iPod must be set up as a hard disk.

To set up the iPod as a hard disk:

1. Open iTunes.
2. Choose your iPod in the iTunes Source list.
3. Click the Options button to open the iPod Preferences window.
4. Select "Enable disk use" or "Manually manage songs and playlists". Either one will allow you to use your iPod as a hard disk.

Refer to iTunes help for more information on using an iPod as a hard disk.

Perform A Synchronization

Once you have completed the iPod setup, you are ready to synchronize.

To synchronize notes in SOHO Notes to an iPod:

Notes that are assigned to the iPod folder will synchronize to the iPod.

1. Choose File > Sync Notes to iPod, or click iPod Sync in the toolbar. If the iPod folder does not contain any notes, the Sync Notes to iPod and iPod Sync button will be disabled.

The notes will be viewable on the iPod under Main Menu > Extras > Notes > SOHO Notes.

Chapter 16

Palm Synchronization

Notes in your personal database can be synchronized with the Memo Pad application on a Palm handheld. This makes it possible to take some or all of your notes with you on the road. Notes in your Palm folder in SOHO Notes are automatically synced to your Palm handheld whenever you synchronize.



This chapter will describe how to make sure your Palm handheld is set up for synchronization and will describe how to perform a synchronization.

Palm Requirements And Setup

Palm synchronization requires certain hardware and software components.

Hardware Requirements

Synchronization requires the following hardware:

- **Palm handheld.** Any Palm handheld device that is compatible with the Palm Desktop 4.2.1 software for Mac OS X. For a list of compatible Palm handheld units visit Palm's web site <<http://www.palm.com/macosx/>>.
- **Mac OS Computer.** A USB port will need to be available so the cradle for the Palm handheld can be plugged into it unless you're using another connection method such as Bluetooth, etc.

Software Requirements

You do not need any special software on your Palm handheld since its synchronization software is built-in. You will, however, need special software on your computer.

- **SOHO Notes version 4.0 or higher.**
- **HotSync software.** SOHO Notes supports the HotSync software provided by Palm and Mark/Space. The HotSync software provided by Palm is FREE, whereas the synchronization software provided by Mark/Space is not free. You may decide which HotSync software you would like to use.
 - **Palm's HotSync Manager and Conduit Manager software commonly known as the Palm Desktop software.** Version 4.2.1 or higher is required if you choose this option.
 - **The Missing Sync for Palm OS by Mark/Space.** Version 4.0.2 or higher is required if you choose this option.
- **ChronosNotes Conduit.** A conduit is the software component that your above HotSync choice uses to synchronize your Palm's data with SOHO Notes.

Palm Setup

To set up your Palm handheld to sync with SOHO Notes:

1. Install and configure the HotSync software you chose to go with. For information on configuring the HotSync software see the web site of either Palm or Mark/Space.
 - The Palm Desktop software can be found at <<http://www.palm.com/macintosh/>>.
 - The Missing Sync for Palm OS can be found at <<http://www.markspace.com/>>.
2. Install the ChronosNotes Conduit. Skip this step if the SOHO Notes installer installed the ChronosNotes Conduit for you. The ChronosNotes Conduit needs to be installed in the “Conduits” folder. The ChronosNotes Conduit is located in the following location: /Applications/SOHO Notes/Support/. The Conduits folder is located in the following location: /Library/Application Support/Palm HotSync/Conduits/.
3. Remove the “Memo Conduit” from the “Conduits” folder. This conduit is for synchronizing with the Palm Desktop and if its not removed, unexpected and incorrect synchronization will result.
4. Disable or remove from the “Conduits” folder any conduit that synchronizes with the Memo application on the Palm handheld. If two or more conduits try to sync with the Memo application, unexpected and incorrect synchronization will result. For information on disabling the Memo sync portion of an application’s conduit refer to their help system.

SOHO Notes Setup

To set up SOHO Notes to sync with the Palm:

1. Launch SOHO Notes.
2. Drag any note(s) to the Palm folder that you want synced to the Memo Pad application on your Palm handheld.

Perform Sync

Once you have completed the installation and setup steps, you are ready to synchronize. Follow the steps below to synchronize.

1. Place your Palm handheld in its cradle.
2. Press the HotSync button on the cradle. SOHO Notes does not need to be open when you perform a sync. A progress dialog will appear and your data will be synchronized. If you experience a problem, check the HotSync log.

For information on where and what notes are synchronized see *Synchronization Information* on page 78.

HotSync Log

Detailed information about the success of a sync is stored in the HotSync Manager’s log. You typically will not receive an error message on your computer screen during a sync, so you will need to refer to this log in order to find out if an error or problem occurred. You should include a copy of the log, which you should copy/paste into any e-mail support correspondence to Chronos. For a list of common error messages see TABLE 7. “Log Error Messages”.

To access the HotSync log for the Palm or Mark/Space HotSync software:

- Launch the HotSync Manager application and choose HotSync > View Log. The HotSync Manager application is located in the “Palm” folder inside the “Applications” folder.
- Launch the “Missing Sync for Palm OS” application and choose Window > Sync Log. The Missing Sync for Palm OS application is located in the “Missing Sync for Palm OS” folder inside the “Applications” fold-

er.

TABLE 7. Log Error Messages

Error	Definition
Note exceeds 4K limit	The Memo Pad application on certain Palm handhelds limit notes to 4K in size, whereas SOHO Notes does not have any restrictions on note size. If a note is larger than 4K and is added to the Palm folder, the ChronosNotes Conduit will not sync the note and it will log the title of the note after the error message in the HotSync log.
Note exceeds 32K limit	The Memo Pad application on certain Palm handhelds limit notes to 32K in size, whereas SOHO Notes does not have any restrictions on note size. If a note is larger than 32K and is added to the Palm folder, the ChronosNotes Conduit will not sync the note and it will log the title of the note after the error message in the HotSync log.
Error Connecting To DB	This error message will occur if the SOHO Notes database has not been created, not online, or is inaccessible for any other reason. To resolve this issue launch SOHO Notes, which will either create the database or bring it online.

Synchronization Information

This section will provide information on the synchronization process between SOHO Notes and the Memo Pad application on the Palm handheld. This information details what notes are synchronized and where the notes are synchronized to.

SOHO Notes To Palm

Notes that are assigned to the Palm folder in SOHO Notes will synchronize to the “Unfiled” category in the Memo Pad application on the Palm handheld. Once a note has been synchronized from SOHO Notes to the Memo Pad application, it can then be assigned to any category in the Memo application that you would like.

TABLE 8. Note Mappings (SOHO Notes To Palm)

SOHO Notes	Palm
(a) Note Title and (b) Note combined	Memo
Palm folder	Unfiled category

Palm To SOHO Notes

Memos that are assigned to any category in the Memo application on the Palm handheld will synchronize to the “Palm” folder in SOHO Notes. Once a memo has been synchronized from the Memo application to SOHO Notes, it can then be ADDED to any folder in SOHO Notes that you would like provided that it remains assigned to the Palm folder as well. For more information on adding a note to more than one folder see Chapter

7 *Creating and Working with Notes* on page 44.

TABLE 9. Memo Mappings (Palm To SOHO Notes)

Palm	SOHO Notes
Memo	(a) Memo Title, First line of memo becomes Note Title (b) Note
Category	Palm folder

Reset Palm Syncing

There may come a time when you will need or want to “start over” with Palm syncing. This can occur if you have acquired a new Palm handheld, information has stopped syncing, or something else is causing the sync not to work correctly between SOHO Notes and the Memo Pad application on the Palm handheld.

To reset Palm syncing between SOHO Notes and the Memo Pad application:

1. Hold down the “Control” key on the keyboard.
2. Perform a HotSync. Leave the Control key held down throughout the entire HotSync process.

This will cause all the notes in the Palm folder in SOHO Notes to synchronize to the Memo Pad application on the Palm handheld, and all the memos in the Memo Pad application to synchronize to the Palm folder in SOHO Notes. This operation may result in duplicate notes being created in SOHO Notes and on your Palm handheld. If duplicates are created, remove the duplicates from either the Memo Pad application or SOHO Notes (but not both) and then perform another HotSync.

Chapter 17

Universal Synchronization

The personal database on your computer may contain notes, contacts, and calendars that were created by SOHO Organizer or SOHO Notes depending upon which SOHO series products you own. The information in your personal database can be synchronized to other applications (Apple's Address Book, Apple's iCal, etc.) and/or devices (cell phones, P.D.A.'s, etc.) attached to your computer. This means, for example, that your contacts in SOHO Organizer will automatically synchronize and appear in Apple's Address Book application and on your cell phone. Your information will thus become universally available on your computer and devices. This universal synchronization uses and requires the synchronization technology built-in to Mac OS X 10.4 and later.

Any application, device, or computer that supports synchronization technology built-in to Mac OS X 10.4 will be able to synchronize with the notes, contacts, and calendars in your personal database. If you have an Apple .Mac account (must be purchased separately), you can even synchronize your notes, contacts, and calendars between multiple computers.

This chapter will describe how synchronization works, explain what happens during your first synchronization, detail how to synchronize your data between multiple computers, and cover how to synchronize your information with cell phone and P.D.A. devices.

Synchronization Helper Applications

The SOHO Series products use two background helper applications called SOHO Sync and ChronosCalendarsService to synchronize the information in your personal database. Each of these applications are automatically launched whenever its services are needed and automatically quits when it's finished. This means you do not need to worry about manually running either. We mention these applications in case you see them running and wonder what they are.

- **SOHO Sync.** This application works in conjunction with Sync Services (part of Mac OS X) to keep your notes, contacts, and calendars synchronized.
- **ChronosCalendarsService.** This application helps ensure shared databases remain synchronized with iCal.

Sync Preferences

Under normal circumstances, you will never need to deal with these background helper applications but should you ever need to, the Sync preference allows you to force a synchronization, choose which items to synchronize, limit the maximum note size when syncing with .Mac, unregister SOHO Sync, and enable sync logging.

To force SOHO Sync to do a synchronization:

The SOHO Sync application will automatically synchronize contacts, calendars, and notes, but the need may arise where you need to force SOHO Sync to do a synchronization.

1. Choose SOHO Notes > Preferences, and click the Sync button.
2. Click the Synchronize Now button.

To choose which items SOHO Sync synchronizes:

SOHO Sync will synchronize contacts, calendars, and notes by default, but you can choose which of these items SOHO Sync will synchronize.

1. Choose SOHO Notes > Preferences, and click the Sync button.
2. Under Sync Settings select which items you would like SOHO Sync to synchronize.

To limit the maximum note size when syncing with .Mac:

Sometime synchronizing notes larger than 5MB in size with .Mac may cause problems. If you limit the maximum note size when synchronizing with .Mac and perform a .Mac sync, only a partial portion of the note will synchronize.

1. Choose SOHO Notes > Preferences, and click the Sync button.
2. Enable the maximum note size option
3. Type the maximum note size in the field.

To unregister SOHO Sync:

In order for SOHO Sync to synchronize contact, calendar, or note information it needs to register with the synchronization technology built-in to Mac OS X called Sync Services. You may need to unregister SOHO Sync from Sync Services to resolve syncing related issues or to remove the Notes icon from the Sync tab of the .Mac preference pane. The next time SOHO Sync runs it will re-register with Sync Services and all contact, calendar, and note information will be re-synced from scratch. The first initial sync can take awhile depending on how much information is synchronized. Under normal operation you should never have to unregister SOHO Sync.

1. Choose SOHO Notes > Preferences, and click the Sync button.
2. Click Unregister SOHO Sync.
3. Click Unregister.

To enable/disable sync logging:

By default sync logging is turned on. The sync log keeps track of everything SOHO Sync does. If there are any problems with the synchronization of items the sync log will help our Support department in troubleshooting the problem.

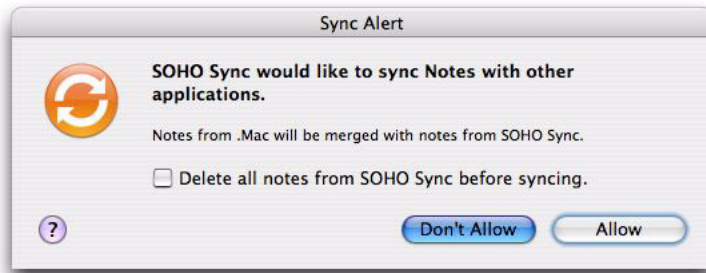
1. Choose SOHO Notes > Preferences, and click the Sync button.
2. Under Sync Log enable or disable the sync log.
3. Click the View Sync Log button if you would like to view the sync log.
4. Click the Clear Sync Log button if you would like to clear the sync log.

The sync log is stored in a file on disk named “SOHOSync.log” and it’s located in the following directory on your computer: ~/Library/Logs/. Where “~” denotes your home folder.

Your First Synchronization

The first time SOHO Sync runs, three Sync Alert windows will appear: one for notes, one for contacts, and one for calendars. This section will describe the choices these alerts present so you can respond accordingly.

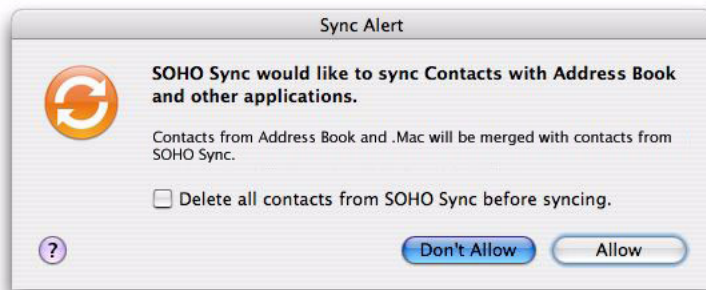
Sync Alert for Notes



To respond to the Sync Alert window for Notes:

- **Delete all notes from SOHO Sync before syncing.** This option will only take effect if you click the Allow button. If you enable this option, all the notes in your personal database will be deleted prior to synchronizing notes from Apple's .Mac. If you don't enable this option, the notes in your personal database will be merged with notes on Apple's .Mac.
- **Allow.** If you click Allow, your notes will be synchronized based on what you chose for the "Delete all notes from SOHO Sync before syncing" option. The Allow option is the preferable choice.
- **Don't Allow.** If you click Don't Allow, then notes in your personal database will not be synchronized at this time and this alert will reappear during the next synchronization session.

Sync Alert for Contacts



To respond to the Sync Alert window for Contacts:

- **Delete all contacts from SOHO Sync before syncing.** This option will only take effect if you click the Allow button. If you enable this option, all the contacts in your personal database will be deleted prior to synchronizing contacts from other applications such as the Apple's Address Book. If you don't enable this option, the contacts in your personal database will be merged with contacts in other applications and devices on your computer.
- **Allow.** If you click Allow, your contacts will be synchronized based on what you choose for the "Delete all contacts from SOHO Sync before syncing" option. The Allow option is the preferable choice.
- **Don't Allow.** If you click Don't Allow, then contacts in your personal database will not be synchronized at this time and this alert will reappear during the next synchronization session.

Sync Alert for Calendars



To respond to the Sync Alert window for Calendars:

- **Delete all calendars from SOHO Sync before syncing.** This option will only take effect if you click the Allow button. If you enable this option, all the calendars in your personal database will be deleted prior to synchronizing calendars from other applications such as the Apple's iCal. If you don't enable this option, the calendars in your personal database will be merged with calendars in other applications and devices on your computer.
- **Allow.** If you click Allow, your calendars will be synchronized based on what you choose for the "Delete all contacts from SOHO Sync before syncing" option. The Allow option is the preferable choice.
- **Don't Allow.** If you click Don't Allow, then calendars in your personal database will not be synchronized at this time and this alert will reappear during the next synchronization session.

.Mac Synchronization

The synchronization technology in Mac OS 10.4 and later will even let you synchronize your notes, calendars, and contacts between multiple computers using an Apple .Mac account (must be purchased separately). In order to use the .Mac sync feature, you will need a .Mac account from Apple. For more information on obtaining a .Mac account see <http://www.chronosnet.com/dotmacaccount.html>.

To set up a SOHO series product to synchronize with .Mac:

1. Open the System Preferences and click the .Mac button.
2. Click the Sync tab.
3. Choose how often you want your information synchronized to your .Mac account. You may want to base your choice on the speed of your Internet connection and how often you need your information kept up to date. There are even options to only synchronize when you manually tell it to or automatically whenever the system determines it needs to.
4. Enable Notes, Contacts, and Calendars in the list depending on what information you want synchronized with .Mac. This means you can synchronize contacts to your .Mac account, but not notes and calendars.

To reset the data in your personal database with .Mac data or vice versa:

If you want to replace the data in your database with the data in your .Mac account, or vice versa, follow the below steps:

1. Open the System Preferences and click the .Mac button.
2. Click the Advanced tab.
3. Click Reset Sync Data.
4. Choose the data you want to reset.
5. Choose whether you want to replace the data on your computer with sync info from .Mac or vice versa.
6. Click Replace.

P.D.A. and Phone Synchronization

The calendar and contact information in your personal database can not only be synchronized with other applications like Apple's Address Book or iCal, but can also be synchronized with your cell phone or P.D.A. using Apple's iSync. For more information on which devices iSync supports and how to use iSync, please visit <http://www.apple.com>.

iPod Synchronization

The calendar and contact information in your personal database can be synchronized to your iPod using Apple's iTunes. For more information on synchronizing calendar and contact information to an iPod, please visit <http://www.apple.com>.