



# **SOHO ORGANIZER™**

## **USER'S GUIDE**

CHRONOS LLC

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# Chapter 1

## Welcome to SOHO Organizer

SOHO Organizer is an integrated contact, calendar and note manager for Mac OS X. It sports all the conveniences of a modern information manager including phone dialing, call logging, automatic relationship links, map generation, iCal event and to-do linking, daily notes, journal, etc. Its flexible interface lets you view your information many different ways including powerful list views that can be sorted and filtered.

SOHO Organizer synchronizes seamlessly with the Mac OS X Address Book and iCal so you have access to your contacts, events, and tasks throughout your system. Because SOHO Organizer works with the synchronization technologies built-in to Mac OS X 10.4 and later, your contacts and calendars can also be synchronized to your cell phone or P.D.A. using Apple's iSync application.

SOHO Organizer also makes sharing contacts, calendars, and notes over a network easy if you're part of a workgroup. It features advanced administration so various members of the workgroup can be assigned different levels of access. Mobile users can even take shared contacts, calendars, and notes with them when they disconnect from the network so they always have access to the shared information. When they reconnect to the network, all of their changes to the shared contacts, calendars, and notes will automatically synchronize with the master list of shared calendars and contacts.

SOHO Organizer is part of the SOHO series of integrated products and is thus part of a larger and more powerful solution. For example, SOHO Organizer works seamlessly with SOHO Print Essentials so you can design and print professional-looking labels, envelopes, letters, fax covers, invoices, address books, etc. for your contacts.

### System Requirements

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

### Learning to use SOHO Organizer

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

#### User's Guide

This guide describes the features and shows how to use SOHO Organizer.

#### Onscreen Help

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

#### Technical Support

Chronos provides various support options for SOHO Organizer. 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 Organizer.

## Upgrade Information

If you are currently running Personal or Group Organizer 4.x, SOHO Organizer can easily import and convert your data. This section will describe this process and any issues related thereto.

### **To convert your 4.x data to SOHO Organizer:**

1. Download the SOHO Organizer Converter application from the following link: [http://www.chronosnet.com/Download/sohoorganizer\\_download.html](http://www.chronosnet.com/Download/sohoorganizer_download.html)
2. Launch SOHO Organizer Converter.
3. Follow the steps in the SOHO Organizer Converter.

The conversion may take awhile depending on the amount of data that is converted.

### **To convert Personal or Group Organizer 3.x data to SOHO Organizer:**

SOHO Organizer cannot directly convert data from Personal or Group Organizer 3.x. Rather, you must first use Personal or Group Organizer 4.x to convert from 3.x. Then follow the instructions in the previous section to convert from 4.x to SOHO Organizer. Personal or Group Organizer 4 is still available for download from [www.chronosnet.com](http://www.chronosnet.com).

# 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 Organizer 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 Organizer for a single user from a disc:

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

#### To install SOHO Organizer for a single user from a download:

1. Open the SOHO Organizer 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 Organizer 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 Organizer on a server and each client machine from a disc:

1. Insert the SOHO Organizer 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 Organizer on a server and each client machine from a download:

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

Once you have installed SOHO Organizer on the server and client machines, you will need to set up SOHO Organizer 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 Organizer installer will install the following items on to your hard disk (“-” denotes your home folder).

- **SOHO Organizer.** This is the main application. The SOHO Organizer application will be installed into a



folder named “SOHO Series” which will be installed in your main Applications folder: /Applications/SOHO Series

- **Chronos/SOHO Organizer.** 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 Organizer/
- **SOHO Sync.** This is a helper application for SOHO Organizer. 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 Organizer 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 Organizer and its related files can be uninstalled two different ways: manually or via the installer.

### To uninstall SOHO Organizer 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 Organizer manually:

The below steps describe how to uninstall of the components related to SOHO Organizer 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 Organizer installer.

1. Delete the “SOHO Organizer” 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 Organizer” 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.SHOOrganizer.plist" file. This file is located in the "Preferences" folder of your home Library folder.
9. Delete the "com.chronos.SHOHNotes.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 Organizer includes a backup mechanism that properly makes a backup of the database. The personal database for SOHO Organizer 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 Organizer includes a backup mechanism that properly makes a backup of the database. The personal database for SOHO Organizer 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 Organizer 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 Organizer. 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 Organizer.
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.

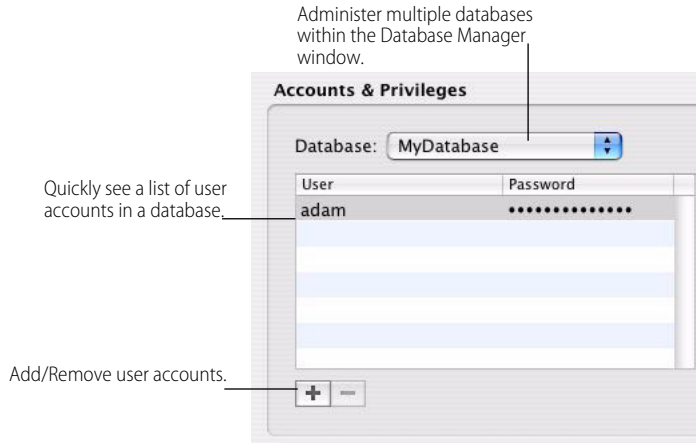
#### **To delete a database:**

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

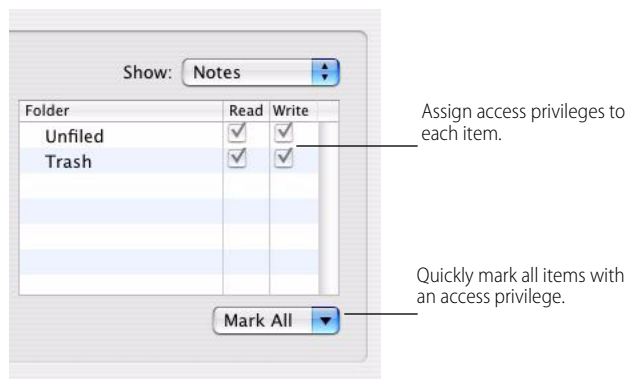
Access privileges provide a way to control the information in a database a user has access to. Access can be individually controlled for notes, contacts, and calendars. For example, notes are organized by folders, so access priv-



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 Organizer.
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:**

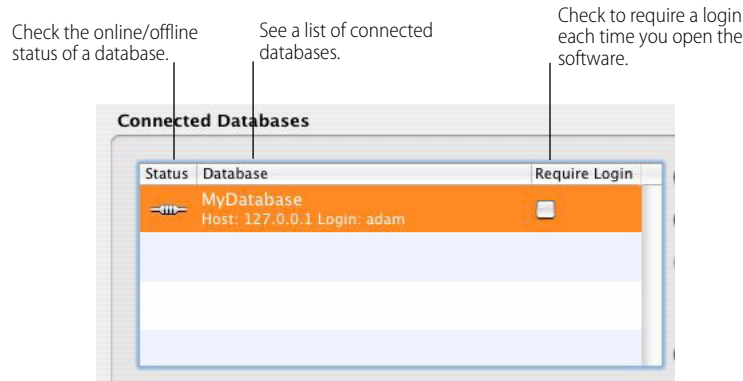
The administrator should have provided you with the following information, so you can open a shared database:

- 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 Organizer to ask you for your account information each time you launch SOHO Organizer. Otherwise, SOHO Organizer 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 Organizer 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 Organizer

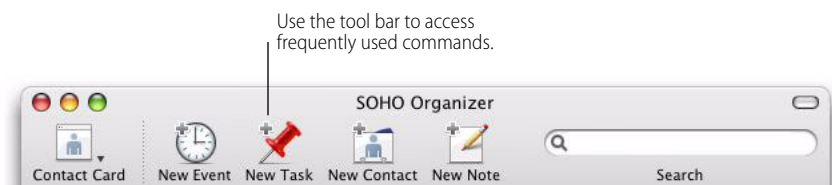
The purpose of this chapter is to acquaint you with the basics of using SOHO Organizer.

### Calendar and Contact Views

When you first launch SOHO Organizer the Contact Card view will be the first window you see. The Contact Card view is one of many calendar and contact views available. Each view has a few common elements between them: the toolbar and tabs. For more information on calendar views see *Calendar Views* in Chapter *Creating and Working with Calendars* on page 44. For more information on contact views see *Contact Views* in Chapter *Creating and Working with Contacts* on page 39.

#### Toolbar

The toolbar at the top of the view 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.

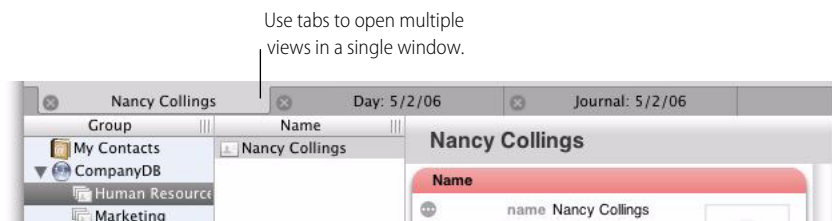
To quickly rearrange a toolbar, hold down the Command key and drag a toolbar item to a new location, or drag it out of the toolbar to remove it.

#### To show or hide the toolbar:

1. Choose View > Show ToolBar or Hide Toolbar.

#### Tabs

You can open calendar and contact views in a tab rather than opening them in a separate window or replacing the contents of the current window. This allows you to open multiple views without having to open and manage multiple windows.



**To open a calendar or contact view in a new tab:**

When you open a calendar or contact view in a tab, the tab will appear in the tab bar located below the toolbar.

1. Choose File > New Tab.

By default new tabs will automatically be selected. This can be disabled in the Tabs preferences (SOHO Organizer > 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 opened.

1. Choose SOHO Organizer > Preferences, and click the Tabs button.
2. Select Always show tab bar.
3. Change the Tab Bar Position to where you would like it.



# Chapter 7

## Creating and Working with Contacts

The purpose of this chapter is to describe how to create and work with contacts including several unique and powerful management features.

### Create a Contact

This section will show you how to create a contact and specify where the contact represents and organization. When you first launch SOHO Organizer, it will automatically synchronize all of the contacts from Apple's Address Book application to your personal database. Thereafter, contacts will remain synchronized between each application. Contacts in shared databases are not synchronized to the Address Book.

### Contact vs. Organization

The main difference between a contact and an organization contact is the way each are displayed. If a contact is marked as an organization, the Name column will display the organization name of the contact and the Name block will list the organization field first. If the contact is not marked as an organization, the Name column will display the first and last name of the contact and the Name block will list the name field first. For more information on the Name block see *Working With Blocks* on page 29.

#### To create a contact:

1. Select a group in the Group column to which the contact will belong.
2. Choose File > New Contact, or click Add (+) the bottom of the Name column.
3. Fill in the contact fields as applicable. For more information on contact fields see *Working With Contact Fields* on page 28.
4. OPTIONAL. Choose File > Save Contact to save the contact. This step is optional because contacts are automatically saved.

#### To create an organization:

1. Select a group in the Group column to which the contact will belong.
2. Choose File > New Contact, or click Add (+) the bottom of the Name column.
3. Type the name of the organization in the organization field and mark it as an Organization.



4. Fill in the contact fields as applicable. For more information on contact fields see *Working With Contact Fields* on page 28.
5. OPTIONAL. Choose File > Save Contact to save the contact. This step is optional because contacts are automatically saved.

**To duplicate a contact:**

1. Select a contact.
2. Choose Edit > Duplicate.

## Create a Group

An easy way to manage your contacts is to organize them into groups. A group can be created at the top level in the list of groups or it can be created within another group. For example, you can create a group named “Employees” and within that folder create sub-folders named “Marketing” and “Sales”.

**To create a group:**

1. Select a group in the list if you want to create a sub-group within it, or select My Contacts to create a group at the top level of your personal database or select a shared database to create a group at the top level of it.
2. Choose File > New Group, or click Add (+) the bottom of the Group column.
3. Type a name for the group and press return.

**To add contacts to a group:**

1. Select contact(s) in the Name column and drag them to a group. Hold down the shift key to select multiple contiguous contacts. Hold down the command key to select multiple contacts in a non-contiguous fashion.

**To see which groups a contact belongs to:**

1. Select a contact.
2. Hold down the Option key.

Any groups a contact belongs to will be highlighted.

## Search Contacts

You can quickly search for a contact or multiple contacts using the Search field in the toolbar. You can also do an advanced search, which lets you further refine a search using additional criteria.

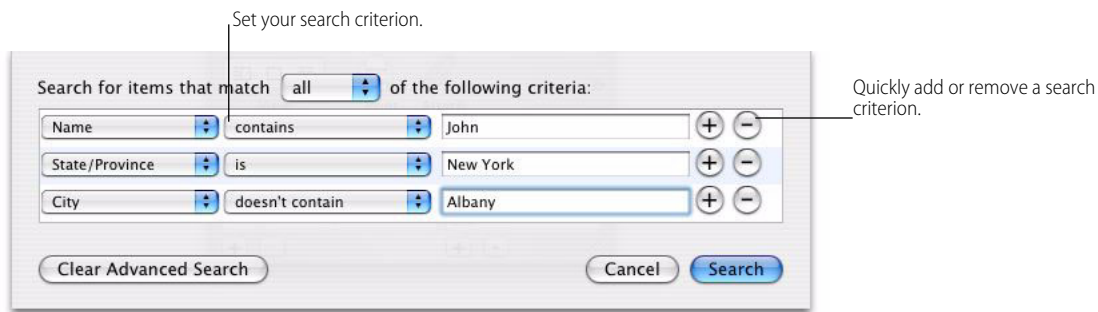
**To search for a contact or multiple contacts:**

1. Click in the Search field in the toolbar.
2. Type the text you want to find. As you type, SOHO Organizer will display the matching contacts.

**To search for a contact using advance search options:**

The advance search options let you further refine a search using additional criteria. For example, you can search for all the John’s in New York but not in Albany, New York.

1. Choose Edit > Advanced Search. The advanced search window will appear.



2. Add and customize search criteria.
3. Click Search to perform the search.

#### To clear the advanced search:

You'll need to clear the advanced search when you want to see all of the contacts of a selected group again.

1. Choose Edit > Clear Advanced Search OR click the Clear Advanced Search button in the Advanced Search window.

## Find and Merge Duplicate Contacts

SOHO Organizer allows you to find duplicate contact records and provides a way to either merge them together, keep all of them, or keep a selected contact record. Furthermore, if you have two unrelated contact records you can merge them together.

#### To find duplicate contacts:

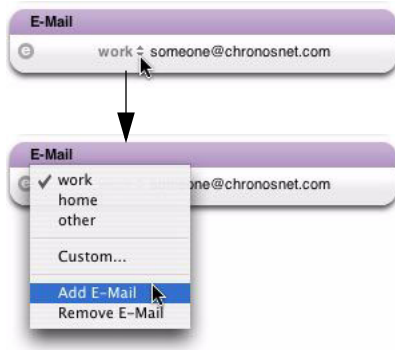
1. Choose Contact > Look for Duplicates.
2. Click Review Changes. The Reviewing Changes window will appear. Each set of duplicate contact records found you will be able to choose what to do with them.
3. Click the Keep Selected tab if you want to keep a particular contact record of a duplicate set. Simply choose the contact you wish to keep from the Selected Contact pop-up menu.
4. Click the Keep All tab if you want to keep each of the contact records of a duplicate set.
5. Click the Merge tab if you would like to merge the duplicate contact records together. You can select whether the oldest or newest contact takes precedence when merging contact records together.
6. Enable Apply to All if you would like your selection from the previous steps to apply to all found duplicate contact record sets.
7. Click OK or Next depending on what was selected in the previous steps.

#### To merge contact records:

1. Select two contact records you would like to merge together. Hold down the Command key when selecting each contact.
2. Choose Contact > Merge Selected Cards.
3. Select "Merge Oldest to Newest" or "Merge Newest to Oldest" depending on which contact record you want to take precedence when merging the contact records together.
4. Click OK.

## Working With Contact Fields

This section will show you how to add, remove and change the label for contact fields. Many contact fields such as Name, E-mail, Phone, Address, and URL have a button next to them to performs an action related to that field. This section will discuss the actions each of the buttons perform. For example, the button next to an email address field, when pressed, will open your default email application and create a new message to the contact.



### To add a field:

You can add any number of fields to a contact such as email, phone, address, etc.

1. Click the label of an existing contact field and choose Add (name of field) from the pop-up menu.

### To remove a field:

1. Click the label of the field you wish to remove and choose Remove from the pop-up menu.

### To change the label of a field:

1. Click the label of the field you wish to change.
2. Choose a label from the pop-up menu, or select Custom to create a new label.

### To use an action button:

When you click the action button next to a contact field such as Name, E-mail, Phone, Address, or URL a certain action will be performed. TABLE 1. "Field Button Actions" will list the contact fields that have action buttons and their corresponding action. These buttons appear to the left of the field label.

**TABLE 1. Field Button Actions**

Action Button	Action
Name	The Name button will open a window that will allow you to review how the full name was separated into the individual name fields.
E-mail	The E-mail button will open the default email application and create a new message to the selected contact.
Phone	The Phone button will let you choose to dial or send an SMS to the selected phone number. For more information on dialing and SMS see <i>Incoming/Outgoing Phone Calls</i> on page 32.

**TABLE 1. Field Button Actions**

Action Button	Action
Address	The Address button will map the address using the Google or MapQuest mapping service. To change the default mapping service, choose SOHO Organizer > Preferences, and click the Contacts button and select the General tab.
URL	The URL button will open the default web browser to the selected URL.
Relationships	The Relationships button will open the linked contact in a new tab.

## Working With Blocks

Blocks are used to organize contact fields by their related type. For example, all the email addresses for a contact will be located in the Email block. This makes it easy to quickly identify the information you're looking for when viewing contacts. This section will show you the basics of blocks, provide information on using each of the different blocks, and describe how to change the visual theme of the blocks. In addition, this section will show you how to specify which fields appear in each block and in what order they appear when a new contact is created.



### Block Basics

This section will show you how to add and remove blocks and rearrange the order in which they appear in the card region and how to show/hide empty blocks in the card region.

#### To add/remove blocks from the card region:

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab. Or, choose Contact > Add Block, and select a block to add to the card region. Or, choose a block to add from the action button pop-up menu located at the bottom of the main window.
2. Check the blocks you want to add/remove in the “Drag blocks to rearrange order in card” list.

#### To rearrange the order in which blocks appear in the card region:

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.
2. Click and drag a block name to a different position in the list.

#### To specify which fields appear in a block and the order in which they appear:

You can specify which fields appear by default when a new contact is created and the order in which they appear. For example, you may want to display a home email address and then a work email address when a new contact is created.

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.
2. Select a block in the Template section.
3. Click the Add (+) button to add a field, or the Delete (-) button to remove a field.
4. Choose a field from the pop-up menu or choose Custom to create a new field.

Click and drag a field to a different position to rearrange the order fields appear in.

**To restrict the minimum and maximum number of block columns:**

The card region arranges blocks into columns and rows. Most blocks will only occupy a single column, but others will occupy two or more columns. You can restrict the minimum and maximum number of block columns the card region has. This will give you control over how the blocks appear in the card region.

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.
2. Type the minimum and maximum number of columns to allow in the card region.

**To show/hide empty blocks in the card region:**

When viewing contact information in the card region, you may want to show or hide the empty blocks.

1. Choose “Hide Empty Blocks” from the action button pop-up menu located at the bottom of the Contact Card view to show or hide the empty blocks in the card region.

**Name Block**

The Name block is where you enter a contact’s name, organization, job title, nickname, etc. You can change the format and individual fields that appear in the Name block. The Standard format includes a minimal amount of name related fields, whereas the Expanded format includes all of the name fields.

The Standard format includes a single Name field in which you type a contact’s first, last, middle, prefix, suffix, and nickname into one field. SOHO Organizer then automatically parses the name you entered and figures out how the name should be divided and saved as individual name fields. This combined name field makes it quick and easy to enter contact names. You can click the Name action button to confirm how SOHO Organizer divided the combined name field if the name you entered is complex. The Expanded format, on the other hand, includes a separate field for each of the name related fields.

**To set the default format for the Name block:**

You can set the default format for the Name block for both a contact and an organization.

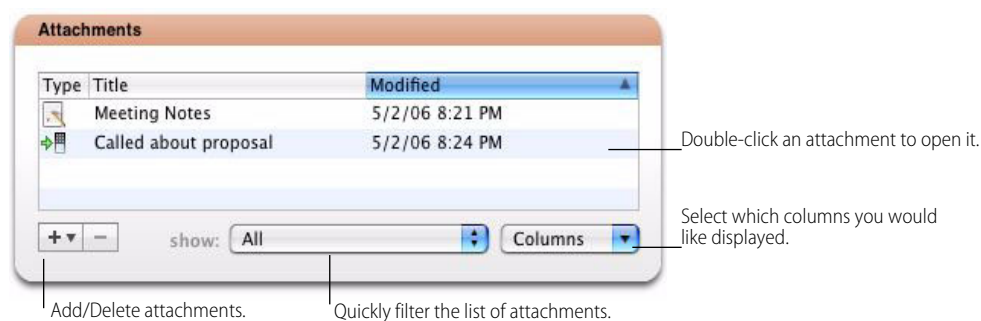
1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.
2. Choose a default format from either the People or the Organizations pop-up menu in the Default Name block region.

**To change the format for the Name block on a contact-by-contact basis:**

1. Select a contact.
2. Choose Contact > Name Block Format, and select a format from the menu. This will change the format only for the selected contact.

**Attachments Block**

The Attachments block is used to keep track of items attached to a contact such as notes, incoming/outgoing calls, incoming/outgoing SMS messages, files, tasks, events, etc.



**To add an attachment:**

1. Click Add (+) and choose an item from the menu to attach to the contact. For more information on attaching a note, file, task, or event to a contact see *Attachments and Links* on page 37. For more information on attaching an incoming/outgoing phone call see *Incoming/Outgoing Phone Calls* on page 32. For more information on attaching an SMS message see *SMS* on page 36.

**To delete an attachment:**

1. Select an attached item and click Minus (-) to delete it. If the item you're deleting is attached to other contacts, the item will be detached from the selected contact but the item will not be deleted. If the item you're deleting is only attached to the selected contact, it will be deleted. If you delete a file attachment, the file will simply be detached from the selected contact, but the file will not be deleted on disk.

**To open an attachment:**

1. Double-click an attachment to open it.

**To control which attachment are displayed and how they are displayed:**

1. Click the Show pop-up menu to filter the attachments by type.
2. Click the Columns pop-up menu to choose the columns to display.
3. Click a column heading to sort on a particular column. 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 dictate whether the column is being sorted in ascending or descending order.

**Keywords Block**

The Keywords block is used to assign keywords to contacts. Keywords provide a way to mark a contact with certain words to help you organize your contacts. You can then use the advanced search to search for contacts based on keywords. For more information on the advanced search option see on page 25.

**Relationships Block**

The Relationships block is used to enter contacts that are somehow related to the selected contact. Related contacts are internally linked to one another automatically for your convenience. For more information on contact linking see *Attachments and Links* on page 37.

**Custom Block**

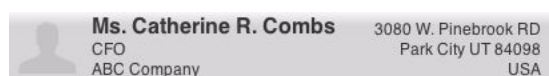
The Custom block is used to store additional fields that don't necessarily fit into one of the other blocks. You can store any type of information you would like in a custom field. For example, you may want to store the birthplace, student ID, or hobby of a contact.

**Address, Phone, E-Mail, URLs, Chat, Notes, and Dates Blocks**

Each of these blocks are used to store information related to their block name. For example, the Phone block is used to store all the phone numbers for a contact.

**Contact Summary**

As the name suggests, the Contact Summary shows a brief summary of a contact's frequently used information. You can choose how many lines of information is shown. For example, if you choose to only show one line in the Contact Summary, only the contacts name and phone number will be displayed.



**To choose how many lines of information are displayed in the Contact Summary:**

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.
2. Select the number of lines you want to display from the Contact Summary pop-up menu.

**Themes**

Themes provide a way to change the appearance of the blocks. SOHO Organizer comes with many professional-looking themes so you can choose a look that works best for you.

**To change the theme of the blocks:**

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.
2. Choose a theme from the Theme pop-up menu.

## Incoming/Outgoing Phone Calls

SOHO Organizer can dial phone numbers using your modem, a \*Bluetooth enabled cell phone, or the speaker in your computer. If you have Caller ID and a phone call comes in, SOHO Organizer will let you know who's calling. Furthermore, you can record and log notes for both incoming and outgoing calls. Logged call notes are automatically attached to the relevant contact. This section will show you how to set up dialing, dial phone numbers, format phone numbers, receive phone calls, and use the Outgoing/Incoming Call windows.

**Note:** Not all Bluetooth enabled phones have the necessary services in order work with SOHO Organizer.

**Set up Phone Dialing**

SOHO Organizer can dial a phone number using your computer's modem, a Bluetooth enabled cell phone, or the speaker in the computer.

- **Modem.** The phone number will be dialed using the modem in your computer. Once the number has been dialed, you will use a regular phone handset to talk.
- **Cell Phone.** The phone number will be dialed using your Bluetooth enabled cell phone. Once the number has been dialed, you will use the cell phone to talk. Your computer and cell phone will need to be Bluetooth enabled and will need to have been paired together in order for this dialing method to work.
- **Speaker.** The phone number will be dialed using the speaker in your computer. You will place a phone handset up to the speaker when the number is being dialed, and the phone handset will recognize the tones and dial the phone number. Once the number has been dialed, you will use the phone handset to talk.

**To choose the default phone dialer:**

1. Choose SOHO Organizer > Preferences, and click the Dialing button.
2. Select a dialing method from the "Default phone dialer" pop-up menu.

**To set up a modem for dialing:**

In order to use a modem for dialing you will need to select which modem you want to use, set the initialization string, and then enabled the modem.

1. Choose SOHO Organizer > Preferences, and click the Dialing button. All settings for modem dialing will be in the Modem section of the Dialing preference page.
2. Select a modem from the "Use this serial port" pop-up menu if you have multiple modems connected to your computer.
3. Set the initialization string. The default string should be sufficient for most modems. Only change this setting if you are familiar with modem initialization strings.



**To enable a modem for dialing:**

You will need to enable the modem for dialing once you have set it up. When you enable a modem for dialing, SOHO Organizer will take full control of the modem (other applications on your computer will not be able to use the modem).

1. Choose SOHO Organizer > Use Modem. If you want to enable the modem automatically when you use SOHO Organizer, choose SOHO Organizer > Preferences, and click the Dialing button and enable “Start modem on application startup”.

**To ignore incoming phone calls:**

When you enable a modem for dialing you can choose to have SOHO Organizer ignore incoming phone calls. This is useful if you have another application that you want to answer incoming phone calls such as a fax application.

1. Choose SOHO Organizer > Preferences, and click the Dialing button.
2. Enable “Ignore incoming phone calls”.

**To set up a Bluetooth cell phone for dialing:**

In order to use a cell phone for dialing both your computer and cell phone will need to be Bluetooth enabled. Both devices will need to be paired using the Bluetooth pane of System Preferences.

**Note:** Not all Bluetooth enabled phones have the necessary services in order work with SOHO Organizer.

1. Choose SOHO Organizer > Preferences, and click the Dialing button. All settings for Bluetooth dialing will be in the Bluetooth section of the Dialing preference page.
2. Click the Choose button to select a Bluetooth enabled cell phone to use.
3. Click “Open Apple Bluetooth Preference Pane” if you need to pair a Bluetooth enable cell phone with your computer.

**To enable a Bluetooth cell phone for dialing:**

You will need to enable your Bluetooth phone for dialing once you have set it up.

1. Choose SOHO Organizer > Use Bluetooth. If you want to enable Bluetooth automatically when you use SOHO Organizer, choose SOHO Organizer > Preferences, and click the Dialing button and enable “Start Bluetooth on application startup”.

**Dial a Phone Number And Log The Call**

This section will show you how to dial a phone number and record notes about the phone call.

**To dial a phone number and log the call:**

1. Select a contact.
2. Click the action button next to a phone number.



3. Choose “Call Using Default Method” from the pop-up menu, or choose Call from the pop-up menu and select a specific call method. For more information on setting the default call method see *To choose the default*

*phone dialer*: on page 32. The Outgoing Call window will appear.

4. Click the Dial button to dial the phone number. For information on using the Outgoing Call window see *Outgoing/Incoming Call Windows* on page 34.

## Phone Formatting

Phone numbers can be formatted to reflect the standard for the country you live, the country your contacts live in, or certain preference you may have. SOHO Organizer comes with a set of standard formats, but you can easily create new formats.

### To choose/create a phone format:

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the Phone tab.
2. Select a format from the pop-up menu, or choose Custom to create a new format.
3. Double-click an existing format to edit it, or click the plus button to add a new format. For example: Suppose you want phone numbers to display as this: 1-888-555-7777 Ext.111. To create this format, type the following into the format field: #-###-###-#### Ext.###.

## Receive Phone Calls

When you receive a phone call, SOHO Organizer will search for a relevant contact using any Caller ID information available to it and open an Incoming Call window. The Incoming Call window will display the contact's information and you will be able to log notes about the call. This information will be saved as an Incoming Call note attachment for the contact. For more information on the Incoming Call Window see *Outgoing/Incoming Call Windows* on page 34.

In order for this to work, your cell phone or modem will need to support Caller ID (most recent models do). You will need to have enabled Bluetooth or Modem for dialing in SOHO Organizer. For more information on enabling these two options see *Set up Phone Dialing* on page 32.

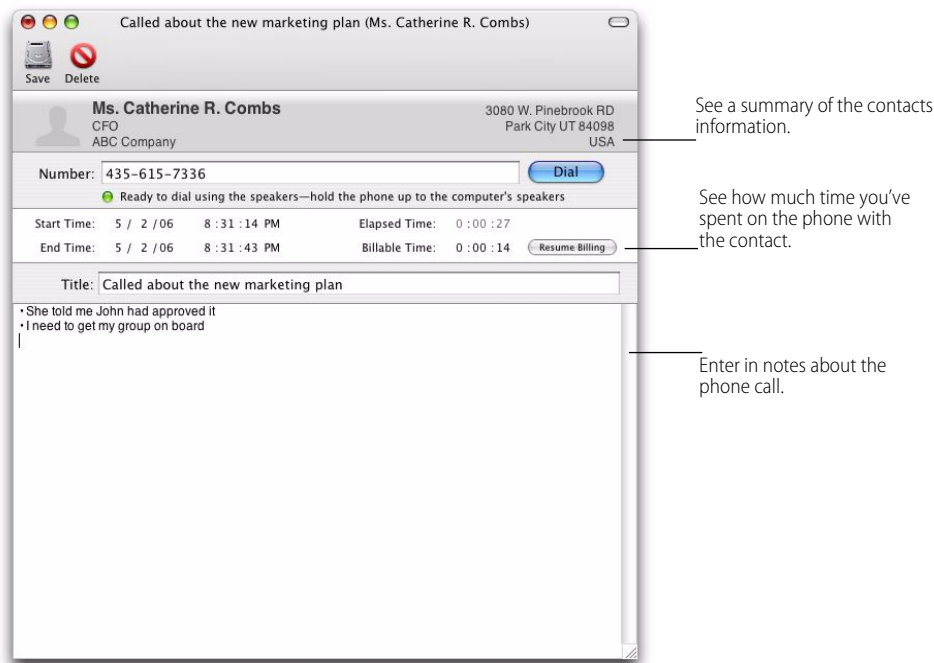
## Outgoing/Incoming Call Windows

The Outgoing and Incoming Call windows provide a way to log communication with a contact and attach it to the contact. In addition, these windows allow you to keep track of time spent on the phone with the contact including the ability to keep track of the billable time.

### To open and use the Outgoing Call window:

1. Dial a contact phone number, or click Add (+) in the Attachments block and choose Outgoing Phone Call

from pop-up menu. The Outgoing Call window will appear.



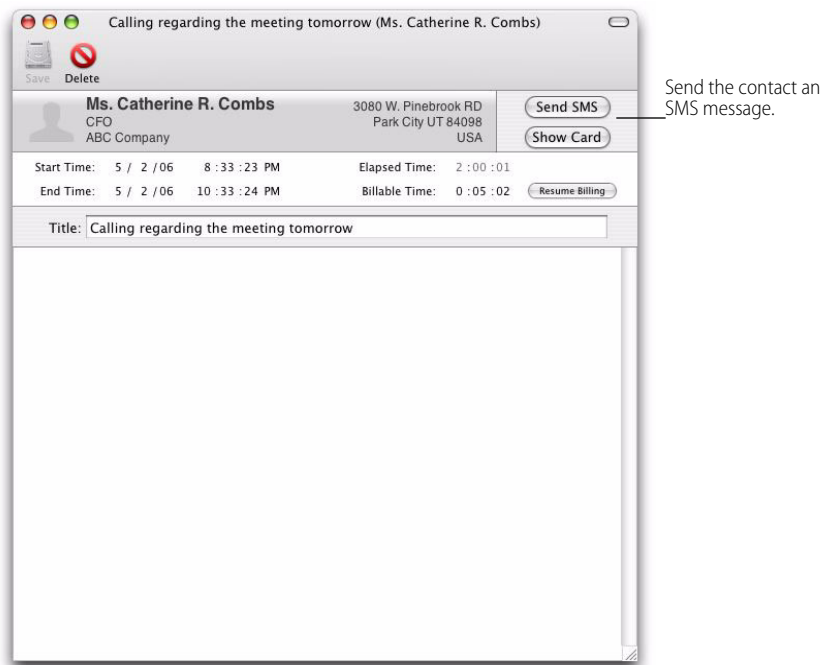
2. Click Dial to dial the phone number. When you dial the phone number the Start Time will be filled in.
3. Click Hang-up when the phone call is complete. When you click Hang-up, the End Time and Elapsed Time will be filled in.
4. Click Start Billing to start the Billable Time. Click Pause Billing to pause the timer, and click Resume Billing to start the timer again.
5. Type a title for the outgoing phone call and enter any applicable notes for the call.
6. The Start Time, End Time, and Billable Time can be edited by clicking in the field you wish to edit.
7. Click Save in the toolbar to save the note, or click Delete to delete the note. The outgoing call note will be saved and attached to the contact.

You will be able to access the outgoing call note from the Attachments block. For more information on the Attachments block see *Working With Blocks* in Chapter *Creating and Working with Contacts* on page 29.

**To open and use the Incoming Call window:**

1. When an incoming call comes in and SOHO Organizer finds the caller in the database using Caller ID, the Incoming Call window will open. You can manually open an incoming call window using by clicking Add (+) in the Attachments block and choose Incoming Phone Call from pop-up menu. The Incoming Call win-

dow will appear.



2. The Start Time, End Time, and Elapsed Time fields will automatically be filled in when the call is received and ended. If you opened a new Incoming Call window via the Attachments block, then you will need to manually enter the Start and End Times.
3. Click Start Billing to start the Billable Time. Click Pause Billing to pause the timer, and click Resume Billing to start the timer again.
4. Type a title for the incoming phone call and enter any applicable notes for the call.
5. The Start Time, End Time, and Billable Time can be edited by clicking in the field.
6. Click Save in the toolbar to save the note, or click Delete to delete the note.

The incoming call note will be saved and attached to the contact. You will be able to access the incoming call note from the Attachments block. For more information on the Attachments block see *Working With Blocks* in Chapter *Creating and Working with Contacts* on page 29.

## SMS

SMS (Short Message Service) is a service for sending and receiving text messages to and from cell phones that support SMS messages. SOHO Organizer can send an SMS message to a cell phone via iChat or a Bluetooth enabled cell phone. It can also receive SMS messages via a Bluetooth enabled cell phone.

### To set up a Bluetooth enabled cell phone for sending and receiving SMS messages:

In order to use a cell phone for sending and receiving SMS messages, both your computer and cell phone will need to be Bluetooth enabled. Both devices will need to be paired using the Bluetooth pane of System Preferences.

1. Choose SOHO Organizer > Preferences, and click the Dialing button. All settings for Bluetooth SMS messaging will be in the Bluetooth section of the Dialing preference pane.
2. Click the Choose button to select a Bluetooth enabled cell phone to use.

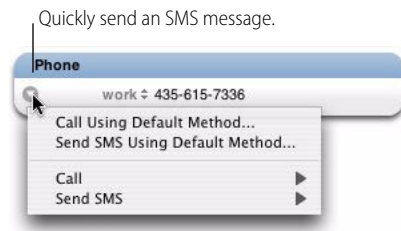
3. Click “Open Apple Bluetooth Preference Pane” if you need to pair a Bluetooth enable cell phone with your computer.

**To enable a Bluetooth enabled cell phone for SMS messaging:**

1. Choose SOHO Organizer > Use Bluetooth. If you want to enable Bluetooth automatically when you use SOHO Organizer, choose SOHO Organizer > Preferences, click the Dialing button and then enable “Start Bluetooth on application startup”.

**To send an SMS message via a Bluetooth enabled cell phone or iChat:**

1. Select a contact.
2. Click the action button next to a phone number. Be sure the phone number is for a cell phone capable of receiving an SMS message.



3. Choose “Send SMS Using Default Method” from the pop-up menu, or choose Send SMS and select Using Bluetooth or Using iChat. You can set the default SMS sender in the Dialing preferences.
4. Type the message you want to send.
5. Click Send.

When you send an SMS message it will be saved into a new note, which will automatically be attached to the contact. You will be able to access the note from the Attachments block. For more information on the Attachments block see *Working With Blocks* in Chapter *Creating and Working with Contacts* on page 29.

**To receive an SMS message:**

When you receive an SMS message via a Bluetooth enabled cell phone, SOHO Organizer will search for the contact via the Caller ID number and open an Incoming SMS Message window. The Incoming SMS Message window will display the SMS message and you will be able to reply to it, call the contact, and show the contacts card. In order for this to work, you will need to have enabled Bluetooth (SOHO Organizer > Use Bluetooth).

The incoming SMS message will be saved into a new note, which will then be automatically linked to the contact. You will be able to access the note from the Attachments block. For more information on the Attachments block see *Working With Blocks* on page 29.

## Attachments and Links

Not only can you attach notes, incoming/outgoing calls, incoming/outgoing SMS messages, files, tasks, events, etc. to a contact, but you can link contacts to each other to form relationships. Attachments appear in the Attachments block while contact links appear with action buttons in the contact card. For more information on the Attachments block see *Attachments Block* on page 30.

### Task and Event Attachments

You can create and attach tasks and events to a contact. These attachments appear in the Attachments block and they also automatically appear in iCal.

**To create and attach a task/event to a contact:**

1. Select a contact.
2. Click Add (+) in the Attachments block and choose Task or Event from the pop-up menu. A new task/event window will appear.
3. Fill-in the appropriate information.
4. Choose File > Save or close the window to save the task or event.

**Note and File Attachments**

You can attach notes and files to a contact. If you own SOHO Notes, you will be able to access and manage all attached notes and files from within SOHO Notes.

**To attach a note to a contact:**

1. Select a contact.
2. Click Add (+) in the Attachments block and choose Note from the pop-up menu. A note window will appear.
3. Enter a title for the note in the title field and any applicable notes.
4. Choose File > Save or click Save in the toolbar to save the note.

You can insert the current date and time into a text note by choosing either Format > Insert Date or Format > Insert Time.

**To link a file to a contact:**

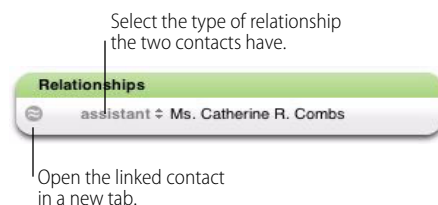
1. Select a contact.
2. Click Add (+) in the Attachments block and choose File from the pop-up menu.
3. Choose a file and select whether to copy it into the note or link it to the note.
  - **Copy into note:** The file will be stored in the database.
  - **Link to note:** A link to the file on disk will be stored in the database.
4. Click Open.

**Contact Links**

SOHO Organizer will automatically link contacts to each other when it can reliably determine a clear relationship. For example, if you have a contact whose organization is Chronos, then the contact will automatically be linked to the Chronos organization if it exists. You can also manually link contacts to each other using the Relationships block.

**To link contacts manually in the Relationships block:**

1. Select a contact that you wish to link to another contact.
2. Make sure the Relationships block is visible. For more information on blocks see *Working With Blocks* on page 29.



3. Enter a contact name in a relationship field. As you type, SOHO Organizer will try and auto-complete the contacts name.
4. Click the label and choose the type of relationship the two contacts have from the pop-up menu.
5. Click the action button to open the linked contact in a new tab.

**To have SOHO Organizer automatically link contacts:**

SOHO Organizer will automatically create a link between a contact and its parent organization.

1. Create a new contact and mark it as an organization, i.e. ABC Company. For more information on marking a contact as an organization see *Create a Contact* on page 25.
2. Create another new contact and enter the above organization name into the organization field. As you type, SOHO Organizer will present a list of organizations that match what you're typing.
3. Choose an organization. The organization will automatically be linked to the selected contact. Likewise, the selected contact will automatically be linked to the organization and will appear in the organization's Relationships block using the selected contact's job title. The organization's address and URL will also automatically be filled-in for the selected contact.

## Print Labels, Envelopes, Letters, Fax Covers, Etc.

SOHO Organizer integrates with SOHO Print Essentials to print professional-looking labels, envelopes, letters, invoices, fax cover sheets, address books, etc.

**To print business documents using SOHO Print Essentials:**

1. Select one or more contacts. Hold down the shift key to select multiple contiguous contacts. Hold down the command key to select multiple contacts in a non-contiguous fashion.
2. Choose File > Print and then choose the document type you wish to print for the selected contacts.

SOHO Print Essentials will automatically launch and present your chosen document type for your contact selection.

## Contact Views

SOHO Organizer has two views for viewing contact(s): Contact Card and Contact List. This section will describe each contact view.

**To switch contact views:**

1. Choose View > Contact Card or Contact List.

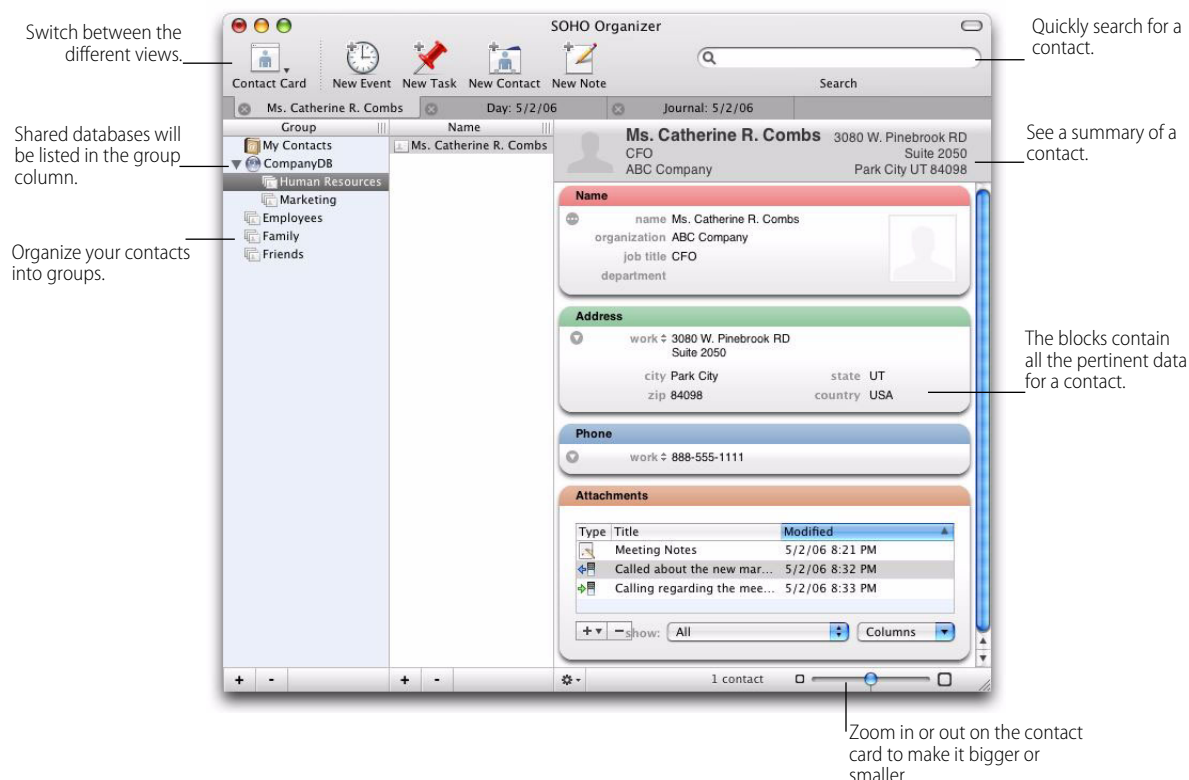


Quickly switch between the different contact views.

### Contact Card

The Contact Card view is the most popular view because it lets you organize your contacts in groups, quickly

make contact selections, browse contact information, and even edit contacts.



The Group column will display the groups of contacts you have created. Groups are used to organize your contacts: Friends, Family, Co-Workers, etc. Furthermore, the Group column will display any shared databases that you are connected to. For more information on shared databases see *Personal Database Versus Shared Databases* in Chapter *Get Started (Multi-user Environment)* on page 12.

The Name column will display the contacts in the selected group or shared database. You can sort the Name column, change the size of text used, and change the display order of contact information.

The card region is used to display and edit the details of a contact such as its phone number, email addresses, etc. These details are grouped into blocks. For more information on blocks see *Working With Blocks* on page 29.

#### To sort the contacts in the Name column:

1. Choose SOHO Organizer > Preferences, and click the Contacts button and select the General tab.
2. Change the Sort By selection.

#### To change the size of text used in the Name column:

1. Choose SOHO Organizer > Preferences, and click the General button.
2. Change the List Font Size selection.

#### To change the display order of contact information:

1. Choose SOHO Organizer > Preferences, and click the General button.
2. Change the Display Name Order selection.

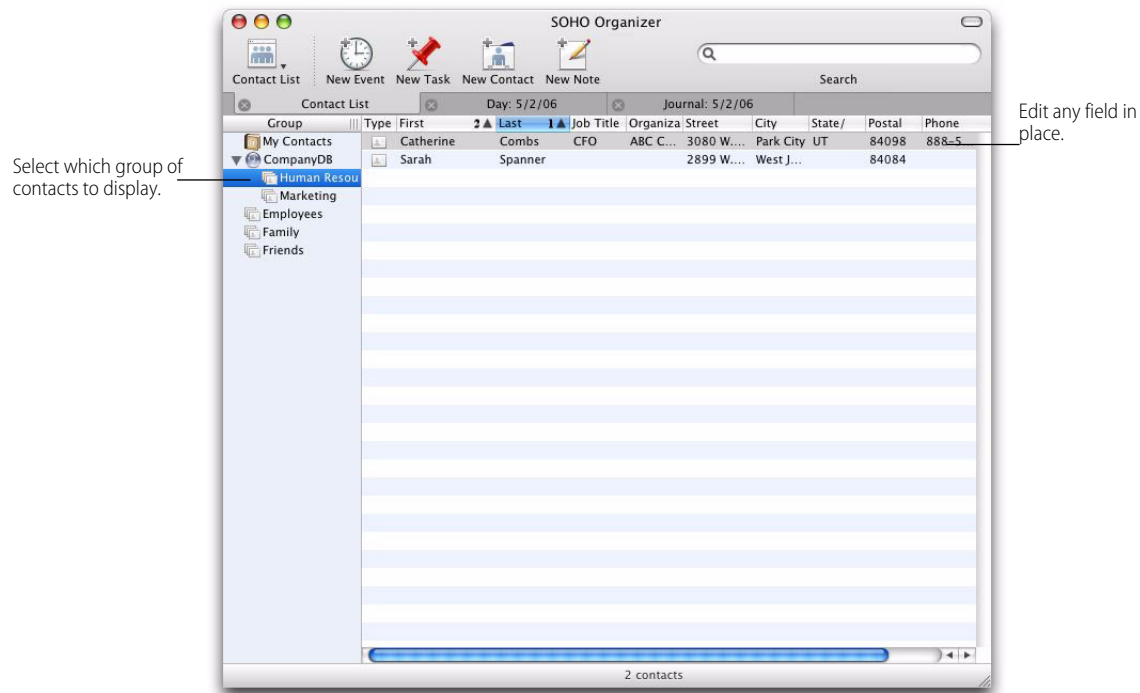
#### To hide the Group and Name columns:

1. Choose View > Hide Contact Columns.



## Contact List

The List view allows you to view and edit multiple contacts at once.



### To sort on a column:

1. Click on the column heading you wish to sort. 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.
2. Hold down the Shift key and select another column to sort on. You can sort up to five different columns. The number in the column heading will indicate the order in which the column is being sorted.

### To edit text in a field:

1. Double-click inside the field you wish to edit.
2. Edit the field contents.
3. Press the return or tab key to save the change.

### To add/remove columns from the contact list:

1. Choose View > Contact List Columns > select a column from the pop-up menu.

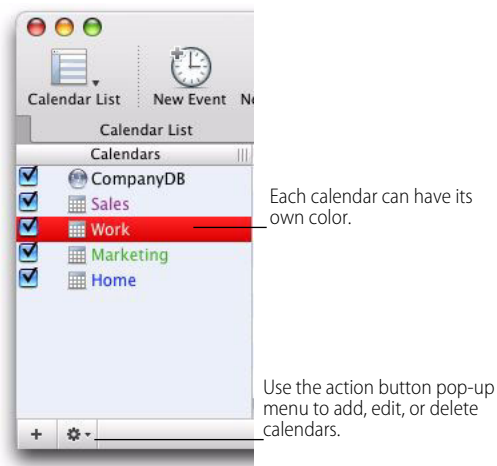
# Chapter 8

## Creating and Working with Calendars

The purpose of this chapter is to describe how to create and work with calendars, events, and tasks.

### Create a Calendar

You can create a calendar to help you organize your events and tasks. For example, you can create a calendar for Work, Home, School, etc. When you create a calendar you can assign a color and description to it. Events and tasks will be color coded in the various calendars views based on the calendar assigned to them.



#### To create a calendar:

Each calendar view will have a Calendars column that will allow you to create, view, and edit calendars (the Journal view is the one exception to this rule).

1. Click Add(+) button at the bottom of the Calendars column.
2. Type a name and description for the calendar.
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.

#### To view a calendar:

You can view any number of calendars or not view any at all. When you view a calendar any event or task assigned to that calendar will appear in the calendar view you have opened.

1. Put a checkmark in the calendar's checkbox in the Calendars column.

#### To edit a calendar:

1. Select a calendar in the Calendars column
2. Choose Calendar Info from the Action button pop-up menu.

3. Edit the calendar information.
4. Click OK.

**To delete a calendar:**

1. Select a calendar in the Calendars column
2. Choose Delete from the Action button pop-up menu.
3. Click OK.

**To hide the Calendars column:**

1. Choose View > Hide Calendars Column.

## Create Events

This section will show you how to create and delete an events. In order to create an event you need to have at least one calendar created. For information on creating calendars see *Create a Calendar* on page 42.

**To create an event:**

1. Choose File > New Event, or you can double-click inside the event region of a calendar view.
2. Fill-in the appropriate information.
3. Choose File > Save or close the window to save the event.

**To delete an event:**

1. Select the event.
2. Choose Edit > Delete.

## Create and Work with Tasks

This section will show you how to create and work with tasks. In order to create a task you need to have at least one calendar created. For information on creating calendars see *Create a Calendar* on page 42.

**To create a task:**

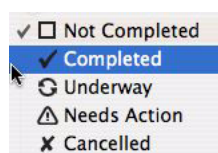
1. Choose File > New Task, or you can double-click inside the task region of a calendar view.
2. Fill-in the appropriate information.
3. Choose File > Save or close the window to save the task.

**To delete a task:**

1. Select the task.
2. Choose Edit > Delete.

**To mark the status of a task:**

You can mark the status of a task in a calendar view without opening the task in its own window.



1. Click the status icon next to a task and select a status from the pop-up menu.

## Calendar Views

SOHO Organizer has several views for viewing calendar information: Day, Week, Month, Year, Calendar List, and Journal. This section will describe each calendar view.

### To switch calendar views:

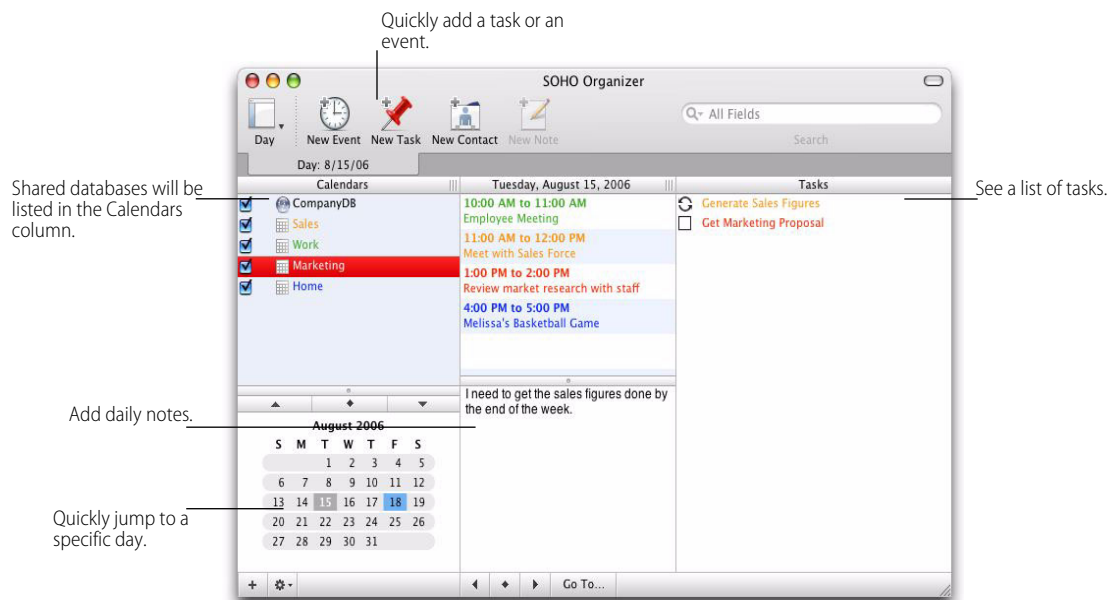
1. Choose View > Day, Week, Month, Year, Calendar List, or Journal.



Quickly switch between the different calendar views.

### Day View

The Day view displays all the events and tasks schedule for a single day. In addition, the Day view includes a Daily Notes region to enter an unlimited amount of notes for each day.



The event region displays your events for the selected day. The events are sorted by the events start time. Each event will be color coded according to the calendar it belongs to.

The task region displays your tasks for the selected day. The tasks are first sorted by priority and then start date and then by title. Each task will be color coded according to the calendar it belongs to.

The Daily Note region is used to enter an unlimited amount of notes for the selected day. Your daily notes will also be accessible from within SOHO Notes. You can use SOHO Notes to search your daily notes.

### To navigate to a specific date:

At the bottom of the Day view are four buttons that allow you to go to a specific date in the Day view.

1. Click the left arrow button to move backward one day at a time.
2. Click the right arrow button to move forward one day at a time.
3. Click the Go to today button to move to the current day.
4. Click the Go To button to move to a specific date.

**To navigate to a specific date using the mini-months in the Calendars column:**

You can use the mini-months in the Calendars column to quickly jump to a specific date.

1. Click a date in a mini-months to jump to a specific date.
2. Click the up or down arrow buttons above the mini-months to go to the previous or next month.
3. Click the diamond button above the mini-months to go to today's date.
4. Drag the divider that divides the mini-months from the list of calendars to show more or less mini-months.

**Week View**

The Week view is coming soon. In the interim, you can use iCal's week view by clicking the "Open iCal Week View" button.

**Month View**

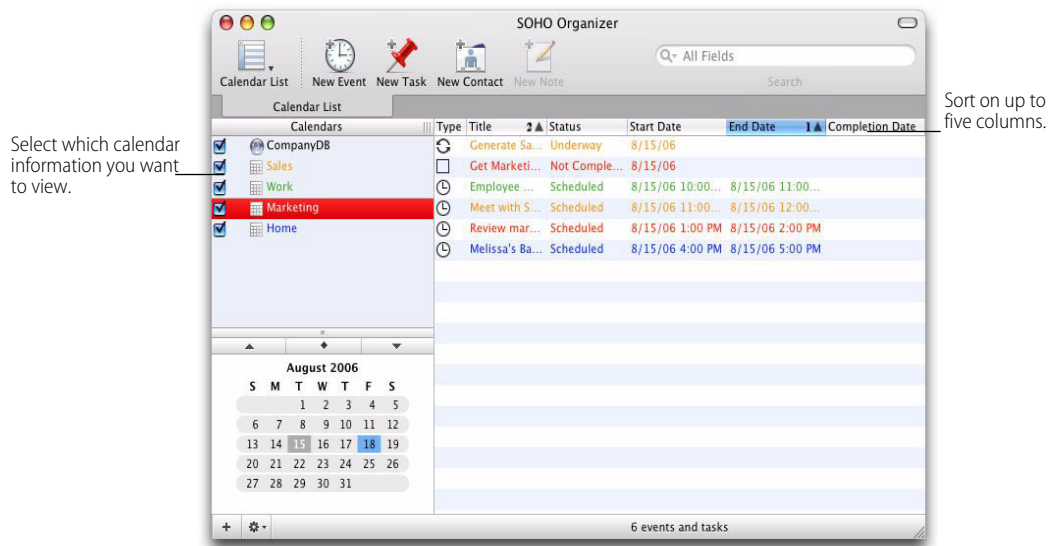
The Month view is coming soon. In the interim, you can use iCal's month view by clicking the "Open iCal Month View" button.

**Year View**

The Year view is coming soon.

**Calendar List View**

The Calendar List view allows you to view multiple events and tasks at once.

**To sort on a column:**

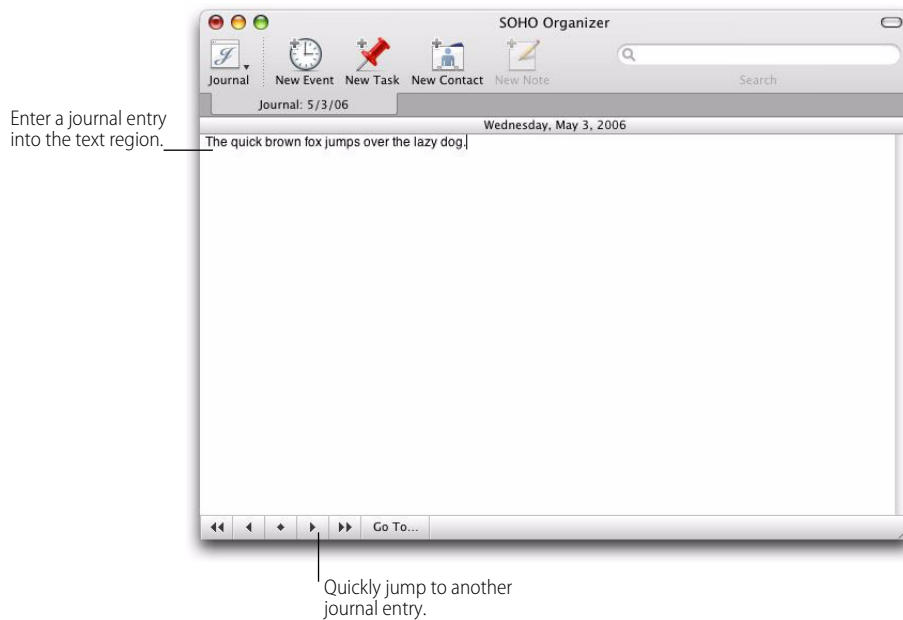
1. Click on the column heading you wish to sort. A blue column heading indicates that the column is being sorted on. The arrow in the column heading will indicate whether the column is being sorted in ascending or descending order.
2. Hold down the Shift key and select another column to sort on. You can sort up to five different columns. The number in the column heading will indicate the order in which the column is being sorted.

**To add/remove columns from the contact list:**

1. Choose View > Calendar List Columns > select a column from the pop-up menu.

## Journal View

The Journal view is used to enter a diary or journal entry for each calendar day. The Journal view organizes your entries by date so you can quickly jump to any journal entry.



### To add a journal entry:

1. Choose View > Journal View.
2. Navigate to the date you wish to add a journal entry to. Use the buttons at the bottom of the Journal view to navigate to a specific date.
3. Type your journal entry into the text region of the Journal view.

### To navigate to a specific date:

At the bottom of the Journal view are seven buttons that allow you to go to a specific date in the Journal view.

1. Click the double left arrow button to move backward to the first date that has a journal entry.
2. Click the left arrow button to move to the journal entry one day backward from the date currently showing in the Journal view.
3. Click the Go to today button to move to the journal entry for the current day.
4. Click the right arrow button to move to the journal entry one day forward from the date currently showing in the Journal view.
5. Click the double right arrow button to move forward to the first date that has a journal entry.
6. Click the Go To button to move to a specific date.

# Chapter 9

## Miscellaneous

This chapter will describe how to import and export contacts, and backup your personal database.

### Import/Export Contacts

SOHO Organizer can import and export contacts that are in the industry standard vCard format.

#### To import vCards:

1. Choose File > Import vCards.
2. Select the vCards you wish to import in the Open window.
3. Click Import to import the selected vCards. Or, you can drag and drop the vCard file(s) from the Finder to the Group or Name columns in SOHO Organizer.

#### To export contacts as vCards:

1. Select the contact(s) you wish to export in the Name column. Hold down the shift key to select multiple contiguous contacts. Hold down the command key to select multiple contacts in a non-contiguous fashion.
2. Choose File > Export vCards.
3. Select where you would like the vCard file to be saved.
4. Click Export. Or, you can select contact(s) in the Name column and drag them to the Finder to export them as vCards.

### Back Up Your Personal Database

SOHO Organizer can make regular backups of your personal database. This is a safety feature in case you inadvertently delete some important information and need to restore a backup file.

**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 up automatic backups:

1. Choose SOHO Organizer > Preferences, and click the Backups button.
2. Set the various backup options:
  - **Automatically perform backups.** This option lets you choose how often SOHO Organizer 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.

## Back Up To Your Hard Disk

### To manually back up your personal database to your hard disk:

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 on your hard disk:

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.

## Back Up To .Mac

If you have a .Mac account with Apple, SOHO Organizer can make a backup of your personal database to your iDisk, and then later restore the database backup. In addition, you can use the .Mac backup feature to move your personal database between multiple computers although using .Mac synchronization is the easier and safer way to accomplish this. 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/dotmacaccount.html>.

### To manually back up your personal database to your .Mac account:

1. Choose File > Back Up Database > To .Mac.
2. Follow the prompts and your database will be backed up. The backup will be created in the following directory on your iDisk: /Documents/Chronos/

### To undo all recent changes and return to a database backup on .Mac:

1. Choose File > Restore Database > From .Mac. Any new notes, contacts, calendars, etc. that you've changed since the backup was created 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 personal 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 Organizer.
2. Choose File > Back Up Database > To .Mac.

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

1. Launch SOHO Organizer.
2. Choose File > Restore Database > From .Mac. 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 move 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.



# Chapter 10

## 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 Organizer > 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 Organizer > 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 Organizer > 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 Organizer > 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.

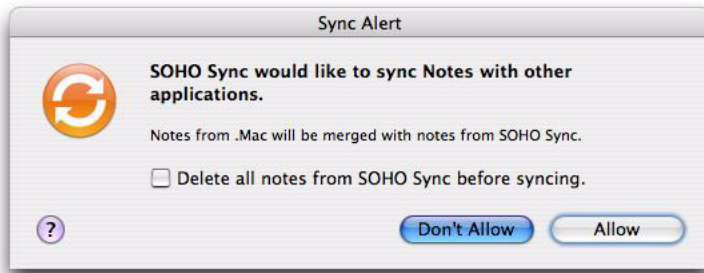
1. Choose SOHO Organizer > Preferences, and click the Sync button.
2. Under Sync Log enable or disable the sync log.
3. Click the View Sync Log button if you would like to view the sync log.
4. Click the Clear Sync Log button if you would like to clear the sync log.

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 affect 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 affect 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>.