SOHO Organizer™
User's Guide

Chronos Inc.

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Chapter 8—Miscellaneous

Chapter 9—Universal Synchronization

Chapter 1—Welcome

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 calendar views, phone dialing, call logging, automatic relationship links, map generation, 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 is actually a suite of three separate but integrated applications:

✦ **SOHO Organizer**. This application manages contacts and calendars.
✦ **SOHO Notes**. This application manages notes.
✦ **SOHO Print Essentials**. This application is used to print labels, envelopes, letterhead, fax covers, and more using the information stored in SOHO Organizer.

NOTE: This user's guide covers SOHO Organizer. For more information on SOHO Notes and SOHO Print Essentials see their respective user's guides.

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, your contacts and calendars can also be synchronized to other supported devices such as your iPhone.

Upgrade Information

If you are currently running earlier versions of SOHO Organizer or Personal/Group Organizer, SOHO Organizer 8 can easily import and convert your data. This section will describe this process and any issues related thereto. It assumes you already know how to use SOHO Organizer.

To convert your SOHO Organizer 7.x data to SOHO Organizer 8:

Before you convert your 7.x data, you should always make a backup of your database first. Follow the steps below to back up your SOHO Organizer 7.x data and convert it for use with SOHO Organizer 8.

1) Launch SOHO Organizer 7.x.

2) Choose File > Back Up Database > To a File, and save the backup to a safe location.

3) Quit SOHO Organizer 7.x

4) Install SOHO Organizer 8.

5) Launch SOHO Organizer 8. The first time you launch SOHO Organizer 8, it will ask you if you want to convert your SOHO Organizer 7.x database to the new database format. Follow the onscreen instructions. The conversion process uses a built-in application called SOHO Migration Assistant that you may see in your Dock.

6) Choose File > Migrate from Version 7 at any time if you want to convert other version 7 databases to version 8.

To convert data from even earlier versions of SOHO Organizer or Personal/Group Organizer:

1) Visit http://www.chronosnet.com/Support/older_db.html.

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, let the pointer rest 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.

Chapter 2—Installation

This chapter will discuss the steps required to install SOHO Organizer. This chapter will also describe how to uninstall the product.

Install SOHO Organizer

You can install SOHO Organizer from either a disc or from a download.

To install SOHO Organizer from a disc:

1) Insert the SOHO Organizer disc into your computer's optical drive.

2) Open the SOHO Organizer folder.

3) Drag the SOHO Organizer 8 folder to your Applications folder.

4) Double-click SOHO Organizer in your Applications folder. SOHO Organizer will automatically install any necessary components the first time it runs.

To install SOHO Organizer from a download:

1) Open the SOHO Organizer disk image in your Downloads folder. An installation volume will appear on your Desktop.

2) Double-click the installation volume on your Desktop.

3) Drag the SOHO Organizer 8 folder to your Applications folder.

4) Double-click SOHO Organizer in the SOHO Organizer 8 folder in your Applications folder. SOHO Organizer will automatically install any necessary components the first time it runs.

Uninstall SOHO Notes

The SOHO Organizer installer will install the following items on to your hard disk ("~" denotes your home folder).

✦   **/Applications/SOHO Series/SOHO Organizer**. This is the main application.
✦   **/Applications/SOHO Series/ SOHO Notes**. This is a companion application that is apart of the SOHO Organizer suite.
✦   **/Applications/SOHO Series/ SOHO Print Essentials**. This is a companion application that is apart of the SOHO Organizer suite.
✦   **~/Library/Application Support/Chronos/SOHO Organizer**. This folder stores support files for SOHO Organizer.
✦   **~/Library/Application Support/ Chronos/SOHO Notes**. This folder stores support files for SOHO Notes.
✦   **~/Library/Application Support/ Chronos/SOHO Print Essentials**. This folder stores support files for SOHO Print Essentials.
✦   **~/Library/Contextual Menu Items/ChronosNotesCM.plugin**. This is an alias file that points to the SOHO Notes contextual menu plugin which is stored inside the main SOHO Notes application.
✦   **~/Library/Widgets/ChronosNotes.wdgt**. This widget appears in Dashboard.

Uninstall SOHO Organizer

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

To uninstall SOHO Organizer:

1) Delete the SOHO Organizer 8 folder that contains your SOHO Organizer, SOHO Notes, and SOHO Print Essentials applications. The folder was originally installed by you, so you are the only one that knows where it is installed. That said, it is likely in your Applications folder.

2) Delete the "Chronos/SOHO Organizer" folder. This is located in the "Application Support" folder of your home Library folder.

3) Delete the "Chronos/SOHO Notes" folder. This is located in the "Application Support" folder of your home Library folder.

4) Delete the "Chronos/SOHO Print Essentials" folder. This is located in the "Application Support" folder of your home Library folder.

5) Delete the "ChronosNotesCM.plugin" file. This is located in the "Contextual Menu Items" folder of your home Library folder.

6) Delete the "ChronosNotes.wdgt" file. This is located in the "Widgets" folder of your home Library folder.

7) Delete the "com.chronos. SOHOOrganizer.plist" file. This is located in the "Preferences" folder of your home Library folder.

8) Delete the "com.chronos.SOHONotes.plist" file. This is located in the "Preferences" folder of your home Library folder.

9) Delete the "com.chronos. SOHOPrintEssentials.plist" file. This is located in the "Preferences" folder of your home Library folder.

10) Delete the "com.chronos. Backup.plist" file. This is located in the "Preferences" folder of your home Library folder.

11) Delete the "com.chronos. SOHONotesService.plist" file. This is located in the "Preferences" folder of your home Library folder.

12) Delete the "SOHONotesService.bundle" file. This is located in the "Services" folder of your home Library folder.

13) Delete the "Chronos/Databases" folder. This is located in the "Application Support" folder of your home Library folder. WARNING: Your data is stored in this folder so deleting it will permanently delete all of your contacts, calendars, and notes.

Chapter 3—Getting Started

SOHO Notes and SOHO Organizer 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 show you where your information is stored and how you get started.

Personal Database

A personal database containing your data is automatically created the first time you launch the software. This database is called "Personal.sohodb" and is stored in your home folder at the below path.

~/Library/Application Support/Chronons/Databases/Personal.sohodb

Your personal database contains all of your notes if you're using SOHO Notes and also contains all of your contacts and calendars if you're using SOHO Organizer. There are several benefits to using an integrated database where notes, contacts, and calendars are all stored in the same database:

✦ **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 object 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.

IMPORTANT NOTE: Under no circumstances should your personal database be moved, renamed, double-clicked, or otherwise altered. The software includes a convenient backup feature to help you easily maintain frequent backups of the database.

Getting Started

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 start working with contacts and calendars:

1) Launch SOHO Organizer.

To print business documents:

1) Launch SOHO Print Essentials.

2) OR Launch SOHO Organizer and choose File > Print to print the documents of your choice for the currently selected contacts.

Using Multiple Databases

You're not limited to using just your Personal database. In fact, you can create and use as many databases as you'd like. The note, contact, and calendar data in a database is completely independent from data in other databases which is really nice if you want to further separate or categorize your data beyond what's possible within a single database.

To create a new database:

1) Choose SOHO Notes > Preferences, and click the Accounts button. The Accounts preference pane shows you all of the databases that the software will automatically open when launched.

2) Click Add (+). A new account sheet will appear.

3) Choose Local Database as the Account Type.

4) Click New. A new database sheet will appear.

5) Enter your database name and click OK.

6) Make sure the database you just created is selected and click OK. The database will appear in your list of accounts. The database will now automatically appear in the Folders sidebar of SOHO Notes if you're using SOHO Notes and in the Groups and Calendars sidebars of SOHO Organizer if you're using SOHO Organizer.

All databases are automatically saved at the following path that cannot be changed:

~/Library/Application Support/Chronons/Databases/

To open an existing database:

1) Choose SOHO Notes > Preferences, and click the Accounts button. The Accounts preference pane shows you all of the databases that the software will automatically open when launched.

2) Click Add (+). A new account sheet will appear.

3) Select the existing database you want to open.

4) Click OK. The database will appear in your list of accounts. The database will now automatically appear in the Folders sidebar of SOHO Notes if you're using SOHO Notes and in the Groups and Calendars sidebars of SOHO Organizer if you're using SOHO Organizer.

To remove or delete an existing database:

1) Choose SOHO Notes > Preferences, and click the Accounts button. The Accounts preference pane shows you all of the databases that the software will automatically open when launched.

2) Select the existing database you want to remove or delete.

3) Click Delete (-). You'll be asked if you want to just remove the database from the list so it's no longer opened or if you also want it permanently deleted.

4) Answer the onscreen prompts accordingly.

Chapter 4—Using SOHO Organizer

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

The Window

When you first launch SOHO Organizer a window will appear. The window can display both contact and calendar views.
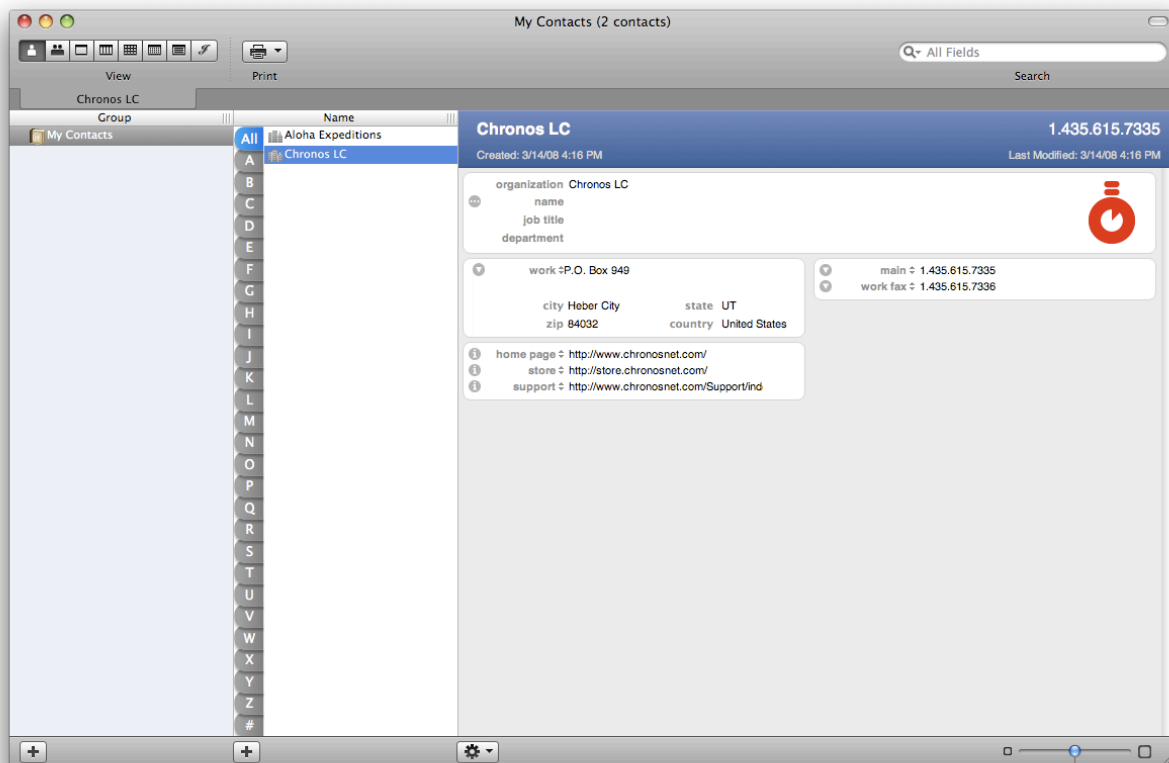
You can open as many windows as you want and each window can display different information.

To open another window:

1) Choose File > New Window.

The Toolbar

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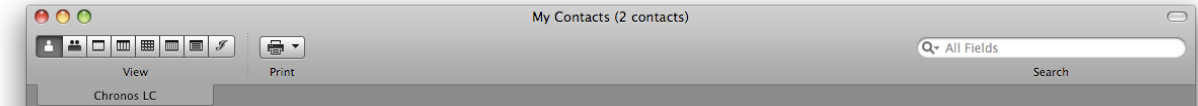
To customize the toolbar:

1)   Choose View > Customize Toolbar.

2)   Drag items into, out of, or to a new location in the toolbar.

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

To show or hide the toolbar:

1)   Choose View > Show ToolBar or Hide Toolbar.

Tabs

You can open calendar and contact views in a tab in a single window rather than opening mulitplie windows. This allows you to open and manage multiple views from a single window.
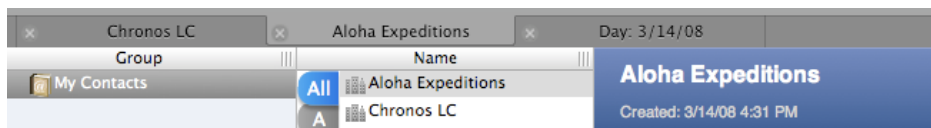
To open a calendar or contact view in a new tab:

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.

Switching Views

A window can display both contact and calendar views and tab by tab basis. You can change the type of view that appears in a window or tab at any time.

To switch the view in a window or tab:

1)   Click the view in the View toolbar button that you wish to see; or choose the view from the View menu.

View

Chapter 5—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.

Contact Card View

The Contact Card view is the most popular contact view because it lets you organize your contacts in groups, quickly make contact selections, browse contact information, and edit contacts. The Group column displays 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 other databases that you are connected to.

The Name column displays the contacts in the selected group. 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.

To open the Contact Card view:

1) Choose View > Contact Card or Contact List.

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 default display order of contact information:

1) Choose SOHO Organizer > Preferences, and click the Contacts button and select the General tab.

2) Change the Display Name Order selection.

To change the current display order of contact information:

1) Choose Contact > Name Ordering and then choose the desired name ordering. Choose Default if you want to use the default name ordering specified in the Contact preferences.

To hide the Group and Name columns:

1) Choose View > Hide Contact Columns.

To choose the size of the text in the Group and Name columns:

1) Choose SOHO Organizer > Preferences, and click the General button.

2) Change the List Font Size selection.

To show/hide the Alphabet Bar:

1) Choose SOHO Organizer > Preferences, and click the Contacts button and select the General tab.

2) Select Show the Alphabet Bar.

To choose the letters that always appear in the Alphabet Bar:

The letters that automatically appear in the Alphabet Bar are based on the current sort field. For example, if you're sorting by last name, then a letter for every last name in the current list will automatically appear in the Alphabet bar. Notwithstanding the automatically added letters, you may want certain letters to always appear in the Alphabet Bar even if no last names contain those letters. This feature is useful for international users whose standard alphabets contain letters other than A-Z.

1) Choose SOHO Organizer > Preferences, and click the Contacts button and select the General tab.

2) Enter letters in the Alphabet bar letters field.

To filter your contacts using the Alphabet Bar:

1) Click a letter in the Alphabet Bar to see all the contacts in the currently selected group whose last name starts with that letter. If a contact is an organization then the organization name is used instead of the last name.

2) Click "#" in the Alphabet Bar to see all the contacts in the currently selected group whose last name (or organization name) starts with a non-alphabet character.

3) Click "All" to see all the contacts in the currently selected group.

To zoom in/out on the card region:

1) Use the zoom slider at the bottom of the Contact Card view to zoom in or out on the card region.

Contact List View

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

To open the Contact List view:

1) Choose View > Contact List.

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 choose the size of the text in the list view:

1) Choose SOHO Organizer > Preferences, and click the General button.

2) Change the List Font Size selection.

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.

Creating and Working with Contacts

This section will show you how to create a contact. 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 remained synchronized between each application. Contacts in other 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.

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.

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.
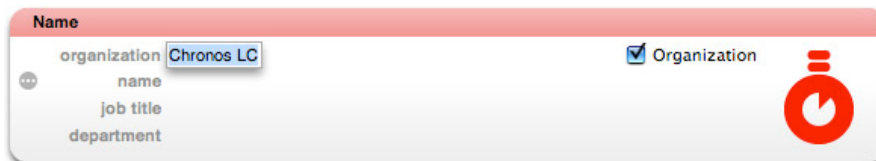
4)   Fill in the contact fields as applicable.

5)   OPTIONAL. Choose File > Save Contact to save the contact. This step is optional because contacts are automatically saved.

To change one or more contacts to an organization or vice versa:

1)   Select one or more contacts.

2)   Choose Contact > This is an Organization. Repeat this step until all the selected contacts have the status you're after.

To duplicate a contact:

1. Select a contact.

2. Choose Edit > Duplicate.

To delete a contact:

1. Select the contact.

2. Choose Edit > Delete or press the Delete key.

Creating and Working with Groups

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 All to create a group at the top level of your personal database or select another 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.

To delete a group:

1. Select the group.

2. Choose Edit > Delete.

Searching 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 advanced search options:

The advanced 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.
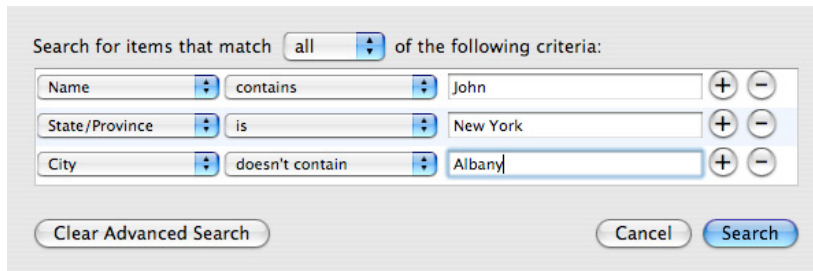
2) Add and customize search criteria.

3) Click Search to perform the search.

To cancel the advanced search:

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

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

To fix searching when it doesn't seem to be working correctly:

SOHO Organizer uses Mac OS X's Spotlight engine when you're searching for a contacts, events, and tasks in the Finder using Spotlight. If you're searching for one of these items that you know exists, but it doesn't appear in the Finder's Spotlight search results then you may need to force Spotlight to rebuild its search index of these items.

1) Choose SOHO Organizer > Preferences, and click the General button.

2) Click Rebuild Search Index.

Finding and Merging 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 Add(+) button that appears to the right of an existing field. The add(+) button will appear when the cursor is within a particular block and will disappear when the cursor leaves the block. For more information on blocks, see Working With Blocks.
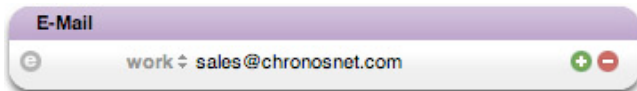
To remove a field:

1) Click the Minus(-) button that appears to the right of an existing field. The minus(-) button will appear when the cursor is within a particular block and will disappear when the cursor leaves the block. For more information on blocks, see Working With Blocks.

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. The following table will list the contact fields that have action buttons and their corresponding action. These buttons appear to the left of the field label.

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.

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.

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

6) Enable "Always show default fields" if you always want the default fields to appear whether or not they are populated with data. If you disable this setting then any default field that is not populated with data will disappear when you save the contact.

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 in the Display section.

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 section.

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.

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.

Tags Block

The Tags block is used to assign tags to contacts. Tags provide a way to mark a contact with certain words to help you organize your contacts. You can then search for contacts based on tags.

Relationships Block

The Relationships block is used to enter contacts that are somehow related (father, daughter, employer, etc.) to the selected contact. For more information on contact linking, see Attachments and Links.

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.

Dates Block

The Dates block is used to store any kind of date associated with a contact. Each date can be labeled (birthday, anniversary, etc.) to help you identify the date. The age (difference between the current date and the date you entered) is displayed in gray to the right of the date for your convenience.
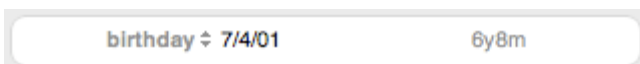
Address, Phone, E-Mail, URLs, and Chat Blocks

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.

Notes Blocks

The Notes block can display extremely large notes. By default, the Notes block will automatically resize to accommodate all the notes. You can optionally have the notes block always have a fixed height in which case the Notes block gains its own scroll bar so you can scroll through long notes from within the block.

To choose whether the Notes block is fixed height:

1) Choose SOHO Organizer > Preferences, and click the Contacts button and select the Layout tab.

2) Select if you want the Notes block to auto-resize or be fixed height from the Notes Block Height pop-up menu.

To quickly insert the current date, time, or date & time into a note:

The Notes block contains some convenience buttons for quickly inserting the current date, time, or date & time into a note. These buttons only appear when you're editing a note and disappear when you're done editing.

1) Click in a note or select some text in the note. The convenience buttons will appear.

2) Click Insert Date, Insert Time, or Insert Date & Time.

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 two lines in the Contact Summary, only the contacts name and phone number will be displayed. Or you can choose to see more information.

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. Plus, 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.

Setting up Phone Dialing

SOHO Organizer can dial a phone number using your computer's modem, a Bluetooth enabled cell phone, Skype account 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 enable Skype for dialing:

SOHO Organizer can dial either a phone number or Skype account user name using the Skype client for Mac OS X. In order to make calls using Skype, you must have an account with Skype and you will need the Skype software for Mac OS X installed on your computer. Visit http://www.skype.com for more information on obtaining a Skype account, downloading the Skype client for Mac OS X, and obtaining pricing information for the Skype service.

1)   Launch the Skype application. The Skype application will need to be running in order for SOHO Organizer to dial a phone number or Skype account name. When you dial, the information is passed to the Skype application which handles the call.

Note: SOHO Organizer can dial phone numbers or Skype accounts using the Skype application. It can also take Skype calls, but it does not support receiving SMS messages from the Skype application.

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.

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.

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

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".

Dialing a Phone Number And Logging a 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.
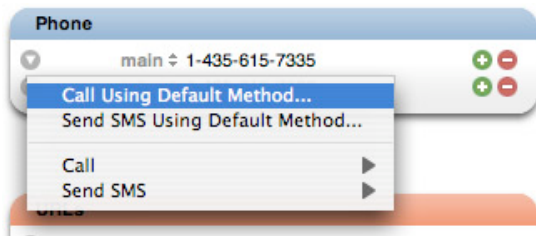
3) Choose "Call Using Default Method" from the pop-up menu, or choose Call from the pop-up menu and select a specific call method. The Outgoing Call window will appear.

4) Click the Dial button to dial the phone number.

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 change how phones numbers are displayed:

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.###.

4) Drag and drop phone number formats to rearrange their order. When SOHO Organizer formats a phone number it gives precedence to formats higher up in the list.

Receiving 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.

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.

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.

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.

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.

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.

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

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.

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.

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.

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 appear in the calendar views.

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.

3) Enter a contact name in a relationship field. As you type, SOHO Organizer will try and auto-complete the contact's 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. If more than one contact matches the linked contact, SOHO Organizer will ask you which contact you want to open. If you want SOHO Organizer to open the first match it finds, change the Ask when multiple linked contacts exist preference. Choose SOHO Organizer > Preferences, and click the Contacts button and select the General tab for this preference.

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.

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.

Contact & Event/Task Links

You can link contacts to events and tasks. The linked contacts show up in events and tasks as attendees.

To create an event using a contact:

1) Drag one or more contacts from the Contact Card view or Contact List view to any calendar view. A new event will be created and the contact(s) will be linked to the event as attendees.

To create a task using a contact:

1) Drag one or more contacts from the Contact Card view or Contact List view to the task region of a calendar view. A new task will be created and the contact(s) will be linked to the task as attendees.

To link contact(s) to an existing event or task:

1) Drag and drop the contact(s) onto the existing event or task.

Printing 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.

3) Click the type of document you wish to print.

4) Select the option that represents the contacts you want to use for the printout. SOHO Print Essentials will automatically launch and present your chosen document type for your contact selection.

Chapter 6—Creating and Working with Calendars

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

Creating 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.
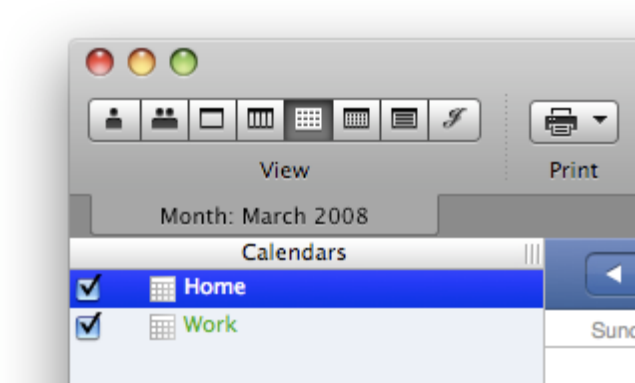
When you first launch SOHO Organizer, it will automatically synchronize all of the calendars, including events and tasks, from Apple's iCal application to your personal database. Thereafter, calendars, events, and tasks will remain synchronized between each application. Calendars, events, and tasks in other databases are not synchronized to iCal.

To create a calendar:

Each calendar view will have a Calendars sidebar that will allow you to create, view, and edit calendars.

1) Click Add(+) button at the bottom of the Calendars sidebar.

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 check-mark in the calendar's checkbox in the Calendars sidebar.

To edit a calendar:

1) Select a calendar in the Calendars sidebar.

2) Choose Calendar > Calendar Info.

3) Edit the calendar information.

4) Click OK.

To delete a calendar:

1) Select a calendar in the Calendars sidebar.

2) Choose Calendar > Delete.

3) Click OK.

To hide the Calendars sidebar:

1) Choose View > Hide Calendars Sidebar.

Subscribing To Calendars

SOHO Organizer can subscribe to and publish calendars in the popular iCalendar format. An iCalendar file will have the file extension ".ics".

When you subscribe to a calendar its events and tasks will be added to either your personal or a different selected database.

There are several web sites that include links for popular calendars you can subscribe to. These can include the US Holidays, your favorite sports teach schedule, etc. A good place to find calendars you can subscribe to is Apple's web site. When you find a calendar you want to subscribe to on any web site you will need to right-click or control-click on the link and choose "Copy Link" from the contextual menu. This will copy the URL to the calendar that will be used for subscribing to it.

To subscribe to a calendar:

1) Choose Calendar > Subscribe.

2) Enter the URL of the calendar you want to subscribe to.

3) Select a database to save the subscribed calendar to from the Database pop-up menu.

4) Select the auto-refresh setting from the Auto-refresh pop-up menu. This setting determines how often SOHO Organizer checks for changes in the subscribed calendar.

5) If you want to see any task or hear any alarms associated with the calendar, deselect the "Remove alarms" or "Remove tasks" checkbox.

6) Click Subscribe.

Once you have subscribed to a calendar it will be listed with your other calendars in the Calendars sidebar, but it will have a curved arrow next to it. Calendars that you have subscribed to are read-only.

To update a subscribed calendar:

You may want to update a subscribed calendar to make sure you have all the latest changes. When you originally subscribed to a calendar you may have set it to automatically update periodically. You can update a subscribed calendar manually.

1) Select a subscribed calendar in the Calendars sidebar.

2) Choose Calendar > Refresh, or choose Refresh All to update all your subscribed calendars.

If you see an explanation point next to a subscribed calendar then there was a problem getting the latest changes. Make sure the URL to the subscribed calendar is correct and check your Internet connection and then try refreshing the subscribed calendar again.

To see a list of public calendars you can subscribe to:

1) Choose Calendar > Find Shared Calendars.

Publishing Calendars

You can publish any of your calendars to the Internet, using MobileMe or a WebDAV server, so that others can subscribe to them. Calendars are published in the popular iCalendar format. An iCalendar file will have the file extension ".ics".

To publish a calendar:

1) Select a calendar in the Calendars sidebar.

2) Choose Calendar > Publish.

3) Type a new name for the calendar. This is useful if you want other users to see a different name for the calendar than the one you use in SOHO Organizer.

4) Choose whether you'll be publishing to MobileMe or a private server.

5) Enter the URL to the WebDAV server, and the login name and password if you're publishing to a private server.

6) Enable "Publish changes automatically" if you want changes made to the calendar published immediately. Otherwise, changes made to the calendar will not be published until you choose Calendar > Refresh.

7) Enable "Publish alarms" if you want alarms assigned to events and tasks to be apart of the published calendar.

8) Enable "Publish tasks" if you want tasks to be apart of the published calendar.

9) Click Publish.

To update a published calendar:

Calendars that you have published you may want to update them to reflect the latest changes you've made in them.

1) Select a published calendar in the Calendars sidebar.

2) Choose Calendar > Refresh, or choose Refresh All to update all your published calendars.

To unpublish a calendar:

If you no longer want a calendar published you will need to unpublish it. When you unpublish a calendar it will be deleted from MobileMe or the WebDAV server. It will not be deleted from the database.

1) Select a published calendar in the Calendars sidebar.

2) Choose Calendar > Unpublish.

CalDAV

CalDAV is an open standard calendar access protocol that allows access to calendars that are in the popular iCalendar format over the WebDAV extensions to the HTTP protocol. CalDAV allows users to publish calendars,

events, and tasks and collaborate on them. CalDAV servers only appear in calendar views and cannot be used to store contacts. Chronos does not provide a CalDAV server nor does it support the set up or maintenance of one. SOHO Organizer is simply a client of a CalDAV server.

To connect to a CalDAV server:

The administrator of the CalDAV server should provide you with the following information, so you can connect to the CalDAV server:

◆ **URL.** This is the URL to the CalDAV server. The URL must begin with either HTTP or HTTPS.
◆ **User Name and Password.** This is your login information to the CalDAV server.

Once you have this information you're ready to connect to a CalDAV server.

1) Choose SOHO Notes > Preferences, and click the Accounts button. The Accounts preference pane shows you all of the accounts that the software will automatically open when launched.

2) Click Add (+). A new account sheet will appear.

3) Choose CalDAV as the Account Type.

4) Enter the URL of the CalDAV server.

5) Enter a description for the CalDav server. This can be anything you want.

6) Enter your user name and password information.

7) Click OK.

8) Make sure the CalDAV account you just created is selected and click OK. The CalDAV account will appear in your list of accounts. The CalDAV server will appear in the Calendars sidebar like any other database.

To get the latest changes from a CalDAV server:

Any time you add, edit, or delete an event or task in a calendar the change is made immediately to the calendar on the CalDAV server. However, changes that are made to a calendar in a CalDAV server by another user won't be made available on your computer until SOHO Organizer checks for any new changes. When you connect to a CalDAV server you can specify how often SOHO Organizer checks for new changes. You can also manually check for new changes.

1) Choose File > Manage Databases and click Users, and click the CalDav button in the toolbar.

2) Click the "Refresh Now" button.

3) Select how often you want SOHO Organizer to check for changes made on the CalDAV server from the Refresh pop-up menu.

Or:

1) Choose Calendar > Refresh All.

Mini Months

You can optionally view one or more mini months in the bottom section of the Calendars sidebar. The mini months provide convenient calendar(s) for you to reference. Plus, you can use the mini months to quickly jump to a particular date in the current calendar view.

To show/hide the mini months:

1) Choose View > Show/Hide Mini Months.

To navigate to a specific date using the mini months in the Calendars sidebar:

You can use the mini months in the Calendars sidebar of each calendar view 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 fewer mini months.

Calendar Views

SOHO Organizer has several calendar views for viewing both events and tasks: Day, Week, Month, Year, and Calendar List. There is also a Journal view used for keeping a diary or journal entry for each calendar day.

To switch calendar views:

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

Calendar Themes

SOHO Organizer uses themes to help you customize the attributes and appearance of your calendar views. You can define as many themes as you want. You choose the colors and setting for each theme and then choose which theme you want to use for your calendar views. You can switch themes at any time. There is even a special theme for printing in case you want your calendar printouts to look different than what you see on screen.

To choose the current theme:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Choose the theme you want your calendar views to use from the Choose theme pop-up menu. All currently open calendar views will change to the selected theme.

To add, rename, and delete themes:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Choose Edit Themes from the Choose Theme pop-up menu.

3) Add, rename, and delete themes as desired.

To define a theme:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Choose the theme you wish to define from the Choose theme pop-up menu.

3) Change any of the settings in the Days, Weeks, Months, and Advanced tabs.

Several calendar views share some of the theme settings in the Days, Weeks, Months, and Advanced tabs. These shared settings will be discussed here. All other settings will be discussed in the respective calendar view sections.

To set the start and end time of your normal work day:

This setting applies to the event schedule region of the Day and Week views.

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Days tab.

3) Set the start and end times of your normal work day.

The time outside of your start and end times will be shaded in the schedule region of the Day and Week views.

To specify the number of days per week and the calendar work week:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Weeks tab.

3) Select a number from the "Days per week" pop-up menu. This setting controls the number of days that are display in the Week view.

4) Check-off the days that comprise your work week.

To specify the weekday that starts a new week:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Weeks tab.

3) Select a weekday from the "Start week on" pop-up menu. By default, SOHO Organizer uses the standard beginning day of week setting for your locale as specified in the System Preferences. Use this preference to choose a different day to start the week on.

Tasks Sidebar

You can turn on an optional Tasks sidebar in the Day, Week, and Month views. The Tasks sidebar shows you all of your relevant tasks. You get to decide what constitutes a "relevant" task. Each task is color coded according to the calendar it belongs to.

To show/hide the Tasks sidebar:

1) Choose View > Show/Hide Tasks.

To sort the tasks in the Tasks sidebar:

1) Click the header at the top of the Tasks sidebar and choose a sort option.

To specify what tasks appear in the Tasks sidebar:

1) Click the header at the top of the Tasks sidebar and check off one or both of these options:

   • **Hide tasks with due dates outside the calendar view.** Example: if a task has a due date of May 25, 2008 and you're looking at January 2007 in the Month view the task will be hidden.
   • **Hide completed tasks after "x" days.** Example: if you have "x" set to "5" then any task that has been marked completed or cancelled for more than five days will be hidden. You can specify the value for "x" in the preferences as shown in the next step.

2) Choose SOHO Organizer > Preferences, and click the Calendars button.

3) Click the Advanced tab.

4) Enable/disable the following options:

- **Hide tasks "x" days after they have been completed or cancelled.** Example, if you have "x" set to "5" then any task that has been marked completed or cancelled for more than five days will be hidden.

Day View

The Day view displays all the events and tasks scheduled 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 schedule region displays your events and task for the selected day. The events are sorted by the event's start time. 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.

When the Day view is showing the current date, a horizontal bar will indicate the current time in the schedule region.

To navigate to a specific day:

In the Date Bar at the top 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 today diamond button to move to the current day.

4) Click the Go To button to move to a specific date.

To display events in a different format in the schedule region:

The schedule region in the Day view can list events in either an hourly schedule or event list type format. The hourly schedule format displays the events with the hours of the days on the left hand side. In this format you can create events by clicking and dragging from the start time to the end time of the event. As the name suggest the list type format displays the events in a list format.

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Days tab.

3) Choose "Show Hourly Schedule" or "Show Event List" from the View schedule in Day view as pop-up menu.

To zoom in/out the schedule region of the Day view:

1) Use the zoom slider at the bottom of the Day view to zoom in or out on the schedule region of the Day view.

To choose whether events, tasks, or both are displayed in the view:

1) Select Show Events, Show Tasks or both at the bottom of the Day view.

Week View

The Week view displays all the events and tasks scheduled for a single week. The schedule region displays your timed events for each day of the week. Your all-day events and tasks are displayed at the top of the schedule region on each day of the week.

When the Week view is showing the current date, a horizontal bar will indicate the current time in the schedule region.

To navigate to a specific week:

In the Date Bar at the top of the Week view are four buttons that allow you to go to a specific date in the Week view.

1) Click the left arrow button to move backward one week at a time.

2) Click the right arrow button to move forward one week at a time.

3) Click the today diamond button to move to the current week.

4) Click the Go To button to move to a specific date.

To zoom in/out the schedule region of the Week view:

1) Use the zoom slider at the bottom of the Week view to zoom in or out on the schedule region of the Week view.

To choose whether events, tasks, or both are displayed in the view:

1) Select Show Events, Show Tasks or both at the bottom of the Week view.

Month View

The Month view displays all the events and tasks scheduled for a single month. Plus, the Month view can be adjusted to show multiple weeks in a single window.

To navigate to a specific month:

In the Date Bar at the top of the Month view are four buttons that allow you to go to a specific date in the Month view.

1) Click the left arrow button to move backward one month at a time.

2) Click the right arrow button to move forward one month at a time.

3) Click the today diamond button to move to the current month.

4) Click the Go To button to move to a specific date.

To specify the number of weeks displayed in the Month view:

1) Click the "# Weeks" button at the bottom of the Month view.

2) Select "Show these weeks".

3) Set the first and end weeks. Use the arrows to navigate through the months.

4) Enable "Fit these weeks to the window" if you want all the weeks to display in the current window. Otherwise, if the weeks do not fit in the current window then there will be a scroll-bar that you can use to scroll through all the weeks (use the zoom slider at the bottom of the window to adjust the height of each week).

To set various preferences for the Month view:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Months tab.

3) Choose a time format from the Time Format pop-up menu. This setting controls whether or not the start and end times of events are displayed.

4) Choose a location for the date from the Date location pop-up menu. This setting controls where the date is displayed in each day cell of the Month view.

5) Enable "Show only days in the calendar work week" if you want to only display your calendar work week.

6) Enable "Show day of year number" if you want the day of the year displayed next to each calendar day. For example, on May 19 the number 139 will be displayed in parenthesis. This means that May 19th is the 139th day from January 1st.

7) Enable "Show week of year number" if you want week numbers displayed next to each week in the Month view. This will also display week numbers next to each week in the mini months in the Calendars sidebar.

8) Click the Choose button to set a background image in the Month view. The image can be in any standard graphic format (i.e. GIF, JPG, TIFF, etc.).

To choose whether events, tasks, or both are displayed in the view:

1) Select Show Events, Show Tasks or both at the bottom of the Month view.

Year View

The Year view differs from the other calendars views in that it does not display events or tasks. Its only purpose is to show you a year calendar. Plus, you can choose to show one year or multiple years at a time.

To navigate to a specific year:

In the Date Bar at the top of the Year view are four buttons that allow you to go to a specific year.

1) Click the left arrow button to move backward one year at a time.

2) Click the right arrow button to move forward one year at a time.

3) Click the today diamond button to move to the current year.

4) Click the Go To button to move to a specific year.

To use the Year view:

1) Click a date in one of the months to jump to a specific date in the Day view.

2) Select the One Year or Multi-Year option at the bottom of the Year view. If you choose One Year then only twelve months will show in the Year view. If you choose Multi-Year then as many months as possible will show in the Year view. If you make the Year view window larger or smaller then more or less months will show.

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 choose the size of the text in the list:

1) Choose SOHO Organizer > Preferences, and click the General button.

2) Change the List Font Size selection.

To add/remove columns from the contact list:

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

To choose whether events, tasks, or both are displayed in the view:

1) Select Show Events, Show Tasks or both at the bottom of the Calendar List view.

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 navigate to a specific date:

In the Date Bar at the top 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 today diamon 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.

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.

Searching Calendars

You can quickly search for events and tasks 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 events or tasks:

1) Click in the Search field in the toolbar.

2) Type the text you want to find. As you type, the matching events and tasks will appear in the calendar view.

To search for events and tasks using advanced search options:

The advanced search options let you further refine a search using additional criteria. For example, you can search for all your meetings where Susan is an attendee.

1) Choose Edit > Advanced Search. The advanced search window will appear.
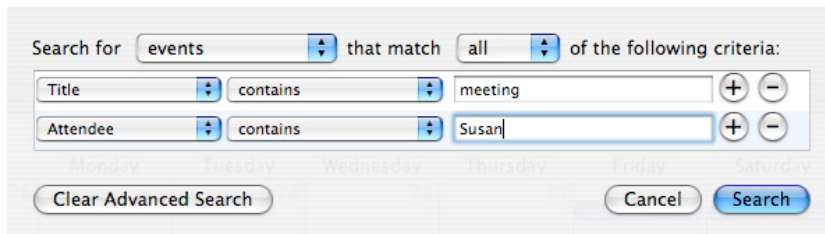
2) Add and customize search criteria.

3) Click Search to perform the search.

To cancel the advanced search:

You'll need to cancel the advanced search when you want to see all of the events and tasks in the calendar view again.

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

To fix searching when it doesn't seem to be working correctly:

SOHO Organizer uses Mac OS X's Spotlight engine for its searching capabilities. If you're searching for an event or task that you know exists, but it doesn't appear in the search results then you may need to force Spotlight to rebuild its search index of events and tasks.

1) Choose SOHO Organizer > Preferences, and click the General button.

2) Click Rebuild Search Index.

Printing Calendars

This section will show you how to print one or more of your calendars.

To print calendars:

1) Open one of the calendars views.

2) Choose File > Print Calendar.

3) Click the type of printout you want to print.

4) Choose a date range that you want printed in the Date Range section.

5) Select which calendars you want printed in the Calendars section.

6) Make your other choices from the Options section.

7) Preview your printout. You can see all pages and zoom in/out as necessary.

8) Click Continue.

9) Click Print.

Chapter 7—Creating and Working with Events and Tasks

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

Creating and Working with Events

This section will show you how to create and work with events. Events are displayed in the various calendar views. In order to create an event you need to have at least one calendar created. For information on creating calendars, see Create a Calendar.

Note: You cannot add, edit, or delete events in a subscribed calendar. For more information on subscribed calendars, see Subscribed Calendars.

To create an event:

1) Select a calendar in the Calendars sidebar that you want the event to be assigned to.

2) Choose File > New Event, or use one of the below methods:

   • Double-click inside the schedule region or the all-day event & task region of a calendar view. A sheet will appear and ask if you want to create an event or task.
   • Click and drag from the start time to the end time for the event in the schedule region of the Day or Week views.

3) Fill-in the appropriate information.

4) Select the Keep Open button if you want to keep this event window open so you can open another event window without this one closing.

5) Click Done to save the event and close the event window.

To set the number of minutes that events are dragged out in:

When you create an event by dragging from the start time to the end time you can specify the number of minutes to increment.

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Days tab.

3) Select the number of minutes from the "Drag event in..." pop-up menu.

To delete an event:

1) Select the event.

2) Choose Edit > Delete.

To move an event to another calendar:

1) Double-click the event.

2) Select a new calendar from the Calendar pop-up menu.

3) Or, drag and drop the event over the calendar you want to move it to in the Calendars sidebar.

To move an event to a different date or time:

1) Drag and drop the event to the new date or time.

To create a task from an event:

You can create a task from any event.

1) Select the event you want to create a task from.

2) Drag and drop the event in the task region of any calendar view. A new task will be created from the event.

**To change the start or end date of an all-day event in the Month view:**

1) Position mouse cursor over either end of the all-day event. The mouse cursor will change to a resize cursor.

2) Click and drag the end of the event to the new desired date.

Creating and Working 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.

Note: You cannot add, edit, or delete tasks in a subscribed calendar. For more information on subscribed calendars, see Subscribed Calendars.

Tasks are displayed in the various calendar views and in the Tasks sidebar. When tasks are displayed in the calendar views they look like this:
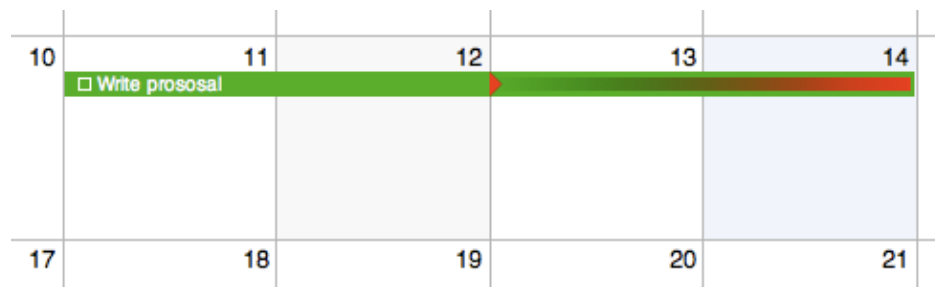
An uncompleted task begins on the task's start date and goes until the current date. If the uncompleted task has a due date, then a small triangle appears in the task to indicate the point in time when the task is past due. The past due portion of such tasks appears in red so you can see exactly how far past due the task is.

To show/hide the Tasks sidebar:

1) Choose View > Show/Hide Tasks.

To choose the size of the text in the Tasks sidebar:

1) Choose SOHO Organizer > Preferences, and click the General button.

2) Change the List Font Size selection.

To create a task:

1) Choose File > New Task, or use one of the below methods:
   - Double-click inside the Tasks sidebar.
   - Double-click inside the schedule region or the all-day event & task region of a calendar view. A sheet will appear and ask if you want to create an event or task.

2) Fill-in the appropriate information.

3) Select the Keep Open button if you want to keep this task window open so you can open another task window without this one closing.

4) Click Done to save the task and close the task window.

To automatically set a due date on newly created tasks:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Advanced tab.

3) Enable "Automatically assign a due date to new tasks.

When you create a new task a due date will automatically be assigned to it.

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.

To move a task to another calendar:

1) Double-click the task.

2) Select a new calendar from the Calendar pop-up menu.

3) Or, drag and drop the task over the calendar you want to move it to in the Calendars sidebar.

To move a task to a different date:

1) Drag and drop the task to the new date.

To create an event from a task:

You can create an event from any task.

1) Select the task in the Tasks sidebar you want to create an event from.

2) Drag and drop the task in the schedule region of any calendar view. A new event will be created from the task.

To change the start or due date of a task in the Month view:

1) Position mouse cursor over either end of the task. The mouse cursor will change to a resize cursor.

2) Click and drag the end of the task to the new desired date.

Working in Different Time Zones

By default, events and tasks are scheduled in the time zone specified in the System Preferences. You can, however, schedule an event or task in any time time. Plus, you can switch the time zone that any calendar view is using to see your schedule relative to that time zone (useful when traveling across time zones).

To turn on/off time zone information:

1) Choose SOHO Organizer > Preferences, and click the Calendars button.

2) Click the Advanced tab.

3) Click Enable time zone support. When time zone support is enabled, you'll see time zone fields below relevant date/time fields throughout the software. You'll also see a time zone button at the bottom of calendar views so you can change the time zone the calendar view is using.

Viewing Event/Task Details Without Opening

To view the details for an event or task without opening it:

1) Position the mouse cursor above the event or task in any calendar view and pause. Detailed information on the event or task will appear.

2) Move the mouse cursor. The detailed event/task information will disappear.

Recurring Events

You can change how often events occur and when they stop occurring. Recurring events are useful for scheduling events the repeat according to some pattern like birthdays, weekly meetings, etc.

To change how often an event occurs:

1) Double-click the event. The event window will open.

2) Click the Repeat pop-up menu to choose how often you want the event to occur. Choose Custom if your want finer control over the recurrence pattern.

3) Click the End pop-up menu to choose when you want the event to stop occurring. You can choose to end on a specific date or after a certain number of times.

To delete a single occurrence of a recurring event:

You can delete a single occurrence of a recurring event without affecting the other days the event occurs on. This is useful, for example, if you have a weekly meeting that gets cancelled on one particular week.

1) Select the event on the day that you no longer want the event scheduled for.

2) Choose Edit > Delete. A confirmation sheet will appear to let you choose one of several deletion options:

   • **Delete Only This Event**. Choose this option if you only want to delete this one occurrence of the event. The event will remain on all other days.
   • **Delete This & All Future Events**. Choose this option if you want to delete all occurrences of the event from the selected event forward (including the selected event).

3) Click the option of your choice.

To reschedule a single occurrence of a recurring event:

You can reschedule a single occurrence of a recurring event without affecting the other days the event occurs on. This is useful, for example, if you have a weekly meeting that gets moved to a different day of the week one particular week.

When you reschedule a single occurrence of a recurring event, a new event is spun-off from the original recurring event. The spin-off event is linked internally to the original recurring event.

1) Double-click and edit the event on the day that you wish to modify. Or drag and drop the event to a different time or day. A confirmation sheet will appear to let you choose one of several modification options:

- **Modify Only This Event**. Choose this option if you only want to modify this one occurrence of the event. The event will remain the same on all other days.
- **Modify This & All Future Events**. Choose this option if you want to modify all occurrences of the event from the selected event forward (including the selected event).

2) Click the option of your choice.

Recurring Tasks

You can change how often tasks occur and when they stop occurring. Recurring tasks are useful for scheduling tasks the repeat according to some pattern like a report that has to filed on the 5th of every month or a bill that you need to pay twice a month.

When you mark the status (Completed, Not Completed, Cancelled, etc.) of a recurring task on a particular day, a new task is spun-off from the original recurring task for that day. The spin-off task is linked internally to the original recurring task.

To change how often a task occurs:

1) Double-click the task. The task window will open.

2) Click the Repeat pop-up menu to choose how often you want the task to occur. Choose Custom if your want finer control over the recurrence pattern.

3) Click the End pop-up menu to choose when you want the task to stop occurring. You can choose to end on a specific date or after a certain number of times.

To delete a single occurrence of a recurring task:

You can delete a single occurrence of a recurring task without affecting the other days the task occurs on. This is useful, for example, if you have you don't need to prepare a monthly report for one particular month.

1) Select the task on the day that you no longer want the task scheduled for.

2) Choose Edit > Delete. A confirmation sheet will appear to let you choose one of several deletion options:

- **Delete Only This Task**. Choose this option if you only want to delete this one occurrence of the task. The task will remain on all other days.
- **Delete This & All Future Tasks**. Choose this option if you want to delete all occurrences of the task from the selected task forward (including the selected task).

3) Click the option of your choice.

To reschedule a single occurrence of a recurring task:

You can reschedule a single occurrence of a recurring task without affecting the other days the task occurs on. This is useful, for example, if you have you need to change the date you pay a monthly bill because you'll be on vacation when the task is regularly scheduled.

When you reschedule a single occurrence of a recurring task, a new task is spun-off from the original recurring task. The spin-off task is linked internally to the original recurring task.

1) Double-click and edit the task on the day that you wish to modify. Or drag and drop the task to a different day. A confirmation sheet will appear to let you choose one of several modification options:

- **Modify Only This Task**. Choose this option if you only want to modify this one occurrence of the task. The task will remain the same on all other days.
- **Modify This & All Future Tasks**. Choose this option if you want to modify all occurrences of the task from the selected task forward (including the selected task).

2) Click the option of your choice.

Chapter 8—Miscellaneous

This chapter will describe how to import and export contacts and calendar information, use special word processing features, and backup your personal database.

Importing/Exporting Contacts

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

To import contact data:

1) Choose File > Import.

2) Select the vCard file(s) you wish to import in the Open window.

3) Click Open to import the selected vCard file(s). 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 data:

1) Open the Contact Card view.

2) 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.

3) Choose File > Export vCard.

4) Select where you would like the vCard file to be saved.

5) Click Export. Or, you can select contact(s) in the Name column and drag them to the Finder to export them as vCards.

Importing/Exporting Calendars

SOHO Organizer can import and export calendar data in the industry standard vCal format.

To import calendar data:

1) Choose File > Import.

2) Select the vCal file(s) you wish to import in the Open window. A vCal file should have the extension ".ics" without the quotes.

3) Click Open to import the select vCal file(s).

4) Choose a calendar from the pop-up menu to import the calendar data into.

5) Click OK.

To export calendar data:

1) Open any of the calendar views.

2) Select a calendar in the Calendars sidebar you wish to export. All the events and tasks assigned to that calendar will be exported.

3) Choose File > Export vCal.

4) Select where you would like the vCal file to be saved.

5) Click Export.

Spelling, Grammar, Substitutions, & Transformations

SOHO Organizer contains many useful and convenient word processing features to help you when writing notes, journal entries, daily notes, etc. For example, you can easily spell or grammar check your journal entry, capitalize text, or insert smart quotes. Some of these features are only available when using Mac OS X 10.6 or later.

To spell or grammar check text:

1) Choose Edit > Spelling and Grammar and then choose the spelling command that you need.

To use text substitutions:

1) Choose Edit > Substitutions and then choose the substitution that you need.

To use text transformations:

1) Select the text you want to transform (make upper case, make lower case, or capitalize).

2) Choose Edit > Transformations and then choose the transformation that you need.

Personal Database Backups

SOHO Notes 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 restore 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 Notes > Preferences, and click the Backups button.

2) Set the various backup options:

- **Automatically perform backups**. This option lets you choose how often SOHO Notes should make a backup. By default, backups will be created on a daily basis.
- **Maximum number of backups to keep**. Enter the maximum number of backups to keep. When a new backup file is created, the oldest backup file will be deleted so that the maximum number of backup files won't be exceeded. To permanently save a particular backup file, you must move it outside of the backup folder or it will eventually be deleted.
- **Perform the backup**. When a backup is scheduled to take place you can choose when the backup is actually performed. The default is to perform the backup when the software quits. If you a schedule a backup for a specific time of day, the software does not have to be running for the backup to occur—your computer simply needs to be left on in an awake state.

- **Compression level**. Backups are compressed to save space on your hard disk, but compressing backups take additional time. Set the compression level to none if you want the backup process to be as fast as possible. Otherwise, the higher the level of compression you choose, the longer the backup will take.
- **Always ask before backing up**. This option lets you choose if you want a window to appear asking you about the backup before starting the backup. This option is useful if you're backing up when the software launches or quits because it gives you the opportunity to skip the backup when it comes at an inconvenient time.
- **Location for backups**. By default, backup files are saved in the directory: ~/Library/Application Support/Chronos/Backups/, where "~" denotes your home folder. Click Choose Backup Location to select a different backup folder.

To manually make a backup of your personal database:

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

2) Name the backup file and choose where it should be saved to.

3) Click Save to save the backup file.

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

1) Choose File > Restore Database > From a File.

2) Select a backup file from the Open dialog.

3) Click Open to restore the database backup.

Any new notes, contacts, calendars, etc. that you've changed since the backup was created will be lost. Any deleted items will be recovered. If you want to keep the information that is currently in the database, you will need to export the data and then later import the data back into the database.

MobileMe Backup

If you have a MobileMe 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 MobileMe backup feature to move your personal database between multiple computers although using MobileMe synchronization is the easier and safer way to accomplish this. In order to use the MobileMe backup feature, you will need a MobileMe account from Apple.

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 manually back up your personal database to your MobileMe account:

1) Choose File > Back Up Database > To MobileMe.

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 MobileMe:

1) Choose File > Restore Database > From MobileMe. 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 MobileMe 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 MobileMe.

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

1) Launch SOHO Organizer.

2) Choose File > Restore Database > From MobileMe. 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 data. Rather, it overwrites your data with the data 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.

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.

Chapter 9—Universal Synchronization

The personal database on your computer may contain notes, contacts, calendars, and tags (this is the master list of tags you can assign to contacts and notes) 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 (iPhone, 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 iPhone. 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.

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

This chapter will describe how synchronization works, detail how to synchronize your data between multiple computers, and cover how to synchronize your information with other devices.

Synchronization Helper Applications

The SOHO Series products use a background helper application called SOHO Sync to synchronize the information in your personal database. SOHO Sync is automatically launched whenever its services are needed and automatically quits when it's finished. We only mention this helper application in case you see it running and wonder what it is.

Sync Preferences

Under normal circumstances, you will never need to deal with SOHO Sync 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 MobileMe, unregister SOHO Sync, and enable sync logging.

To force SOHO Sync to do a synchronization:

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

1)   Choose SOHO Organizer or SOHO Notes > Preferences, and click the Sync button.

2)   Click the Synchronize Now button.

To choose which items SOHO Sync synchronizes:

SOHO Sync will synchronize notes, contacts, calendars, and tags by default. You can, however, choose to sync only some or none of these items.

1)   Choose SOHO Organizer or SOHO Notes > Preferences, and click the Sync button.

2)   Under Sync Settings select which items you would like SOHO Sync to synchronize.

To limit the maximum note size when synchronizing with MobileMe:

Synchronizing notes larger than 5MB in size with MobileMe may cause problems with MobileMe and can make your MobileMe synchronizations take a long time. Fortunately, you can tell SOHO Sync to not synchronize the contents of notes that exceeds a specified maximum size. Notes that exceed this maximum size will still synchronize but their contents will only contain a short message describing why the contents aren't available.

1) Choose SOHO Organizer or SOHO Notes > Preferences, and click the Sync button.

2) Enable the option to limit synchronization to a maximum size.

3) Type the maximum note size in the field.

WARNING: Use this option with caution. If you perform a reset sync with MobileMe where you replace the notes on your computer with the notes currently on MobileMe, you will lose the contents of all notes that exceed the maximum size. This will occur because the content of notes that exceed the maximum size will not exist on MobileMe.

To unregister SOHO Sync:

In order for SOHO Sync to synchronize your 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 SOHO Notes or SOHO Tags icons from the Sync tab of the MobileMe preference pane. The next time SOHO Sync runs it will re-register with Sync Services and all of your notes, contacts, calendars, and tags will be re-synced from scratch. The first initial sync can take awhile depending on how much information is synchronized. Under normal circumstances, you should never have to unregister SOHO Sync.

1) Choose SOHO Organizer or SOHO Notes > Preferences, and click the Sync button.

2) Click Unregister SOHO Sync.

3) Click Unregister.

To enable/disable sync logging:

By default sync logging is turned on. The sync log keeps track of everything SOHO Sync does. If there are any synchronization problems, the sync log can help our Support department troubleshoot the problem.

1) Choose SOHO Organizer or SOHO Notes > Preferences, and click the Sync button.

2) Under Sync Log enable or disable the sync log.

3) Click the View Sync Log button if you would like to view the sync log.

4) Click the Clear Sync Log button if you would like to clear the sync log.

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

MobileMe Synchronization

The synchronization technology in Mac OS X will let you synchronize your notes, calendars, contacts, and tags between multiple computers using an Apple MobileMe account (must be purchased separately). In order to use the MobileMe synchronization feature, you will need a MobileMe account from Apple.

To set up a SOHO Organizer or SOHO Notes to synchronize with MobileMe:

1) Open the System Preferences and click the MobileMe button.

2) Click the Sync tab.

3) Choose how often you want your information synchronized to your MobileMe 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 SOHO Notes and SOHO Tags in the list depending on what information you want synchronized with MobileMe.

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

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

1) Open the System Preferences and click the MobileMe button.

2) Click the Sync tab.

3) Click Advanced.

4) Click Reset Sync Data.

5) Choose the data you want to reset.

6) Choose whether you want to replace the data on your computer with sync info from MobileMe or vice versa.

7) Click Replace.

iPhone Synchronization

The calendar and contact information in your personal database can also be synchronized with your iPhone using Apple's iTunes.

P.D.A. and Phone Synchronization

The calendar and contact information in your personal database can also be synchronized with other cell phones or P.D.A.'s 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.