

SmartOrganizer 3.0 Help

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3.0 Release Notes

The biggest change in SmartOrganizer 3.0 is now it supports higher resolution including 240x320, 480x640 and 480x800. It also can be used with both Portrait and Landscape mode.

There are also tons of improvements in all areas. Some highlights are:

- Quick Insert in all the lists
- Expand All/Collapse All in all the lists
- New checkbox in Task List to quickly mark a finished task
- Allow user to edit Pre-defined tasks in Daily Scheduler
- Automatically load Quick Tasks from Task List to Daily Scheduler
- Less confusing menu in Packing List
- Add quick quantity selection when doing inventory
- Provide pre-loaded Packing Master List and Inventory List
- Automatically update inventory list from the shopping list

New features are marked **[NEW]** in the following user guide.

Installation Guide

Due to the installation issue on Vista operating system, we do not provide the MSI installation package anymore. To install SmartOrganizer, please follow the steps listed below:

1. Drag and drop the SmartOrganizer.CAB file to your PocketPC or SmartPhone.
2. Open the File Explorer on your device, find the CAB file and tap it.
3. Follow the prompt on the window and finish the installation

If you have previous version of SmartOrganizer installed, please remove/uninstall it first.

IMPORTANT NOTE:

This application requires Microsoft .NET Compact Framework 2.0.

Windows Mobile 6 has it pre-installed. If your device has older OS, you will need to install .NET Compact Framework 2.0 first. Please go to www.dotnetideas.com for detail and download the .NET Compact Framework 2.0

This application does not use any database. It saves all the data in XML files. The application will create “SmartOrganizer” folder under “\My Documents” on your device. This folder will contain all the lists the application will create. You can back them up by copying them to another location. When you move from one device to another, you can create this folder on the new device and copy all the files over.

Terms and Conditions



SmartOrganizer, along with other software listed on www.dotnetideas.com, is part of the **Dev2Help** project.

This project is aimed to raise money to help people in need. This software is free of charge for personal use only.

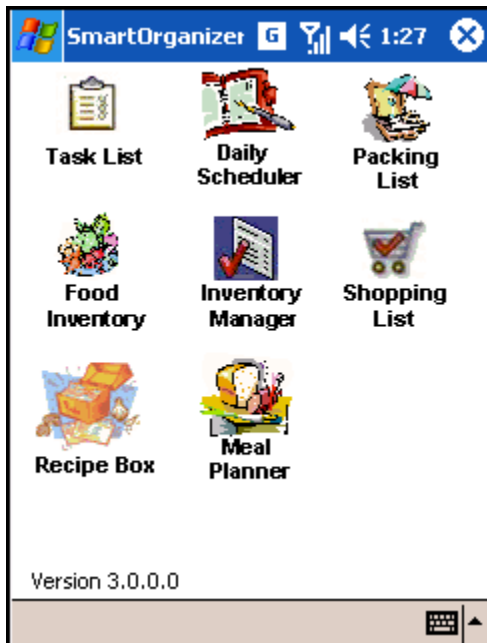
If you like our software, you may go to www.dotnetideas.com to make a donation. All of your donation will go to one of the charities listed on our web site.

Thank you for your support. Little by little, we can make a difference.

Questions and Feedback

If you have any issue installing, running the application, please feel free to contact us. You can find contact information on www.dotnetideas.com

Overview



SmartOrganizer is a collection of tools for Pocket PC/SmartPhone. It helps you to easily organize your tasks, schedule, shopping list, inventory, packing list, recipes and plan meals.

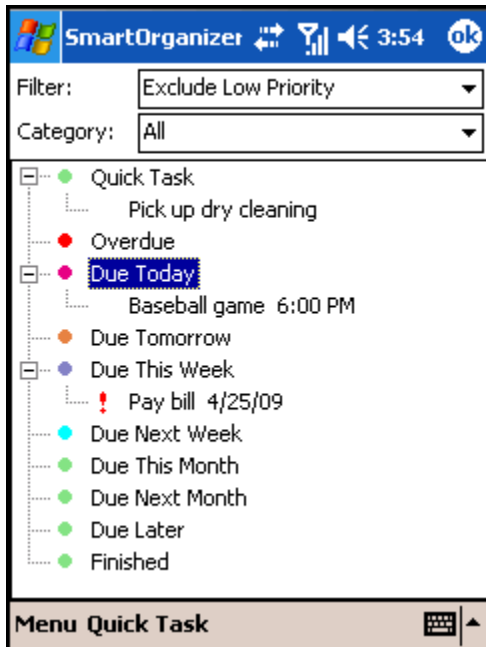
Key features:

- Comprehensive task list allow you to view tasks/appointments grouped by due date in one view
- User can setup patterns for re-occurring tasks/events. The application will automatically calculate the next due date
- User can load task list to Daily Scheduler for easy scheduling
- User can create a master packing list and generate packing lists from it
- Food Inventory and Inventory Manager has a visual view of your inventory (food, household, etc.).
- Generate Shopping List from Inventory Manager and update Inventory List from Shopping List
- Meal Planner allow you to view recipes, check inventory and update the Inventory List for creating shopping list for your meal later.
- Pre-defined Packing Master List and Inventory List for your convenience.

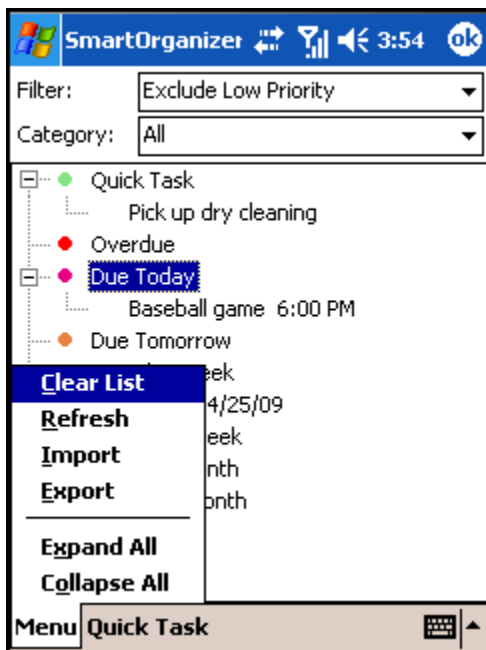
If you have created PackingMasterList, FoodInventory and InventoryList within previous version of SmartOrganizer, the application will not load these three Pre-defined lists for you. You can click on Option>Load...List to merge your list with system lists. This process may take 10-20 seconds depends on the length of your list and the speed of your device.

User Guide

Task list



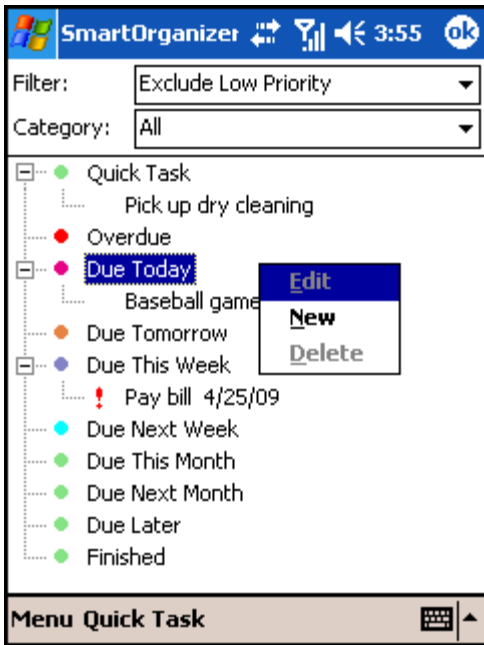
Task list is a tool to manage your tasks and appointments. You can add one time task/appointment or re-occurring events. They are grouped by due date. The task list will also automatically calculate the next due date for re-occurring event.



To start a new list, click on “Clear List” menu. You may export current list to some other location and then import it in later.

[NEW]

To expand/collapse all nodes, click on “Expand All” or “Collapse All”

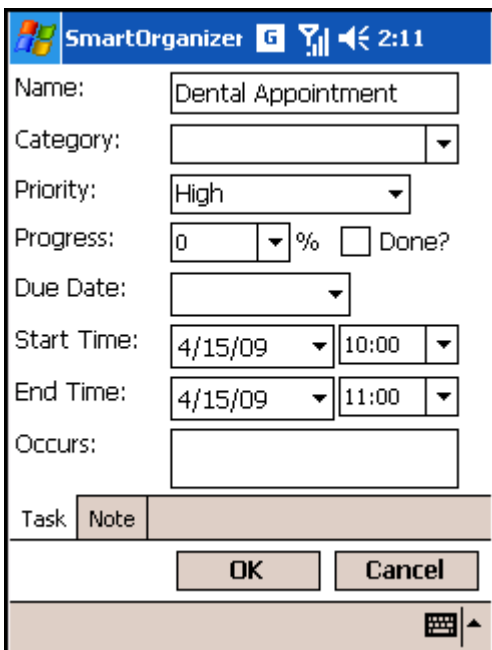


[NEW]

In previous version, the “Edit”, “New” and “Delete” are on the menu bar. Now they have been moved to Context Menu.

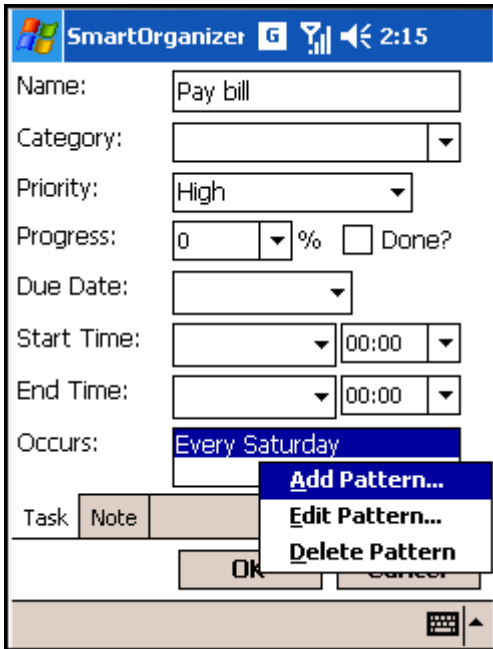
Tap and hold the stylus on the list. A popup menu with “Edit”, “New” and “Delete” menu items will show up.

You may create new task/appointment by choosing “New” from the popup menu. To edit or delete an existing one, you just click on the task to highlight it and then click on “Edit” or “Delete” from the popup menu.



After click on “New” or “Edit” menu, the task detail window will show up. You may enter the name, category (i.e. Family, Work, etc.). You may also pick its priority, record progress, set up the due date or start time/end time.

Any tasks without a due date and start/end time will fall under “Quick Task” category.

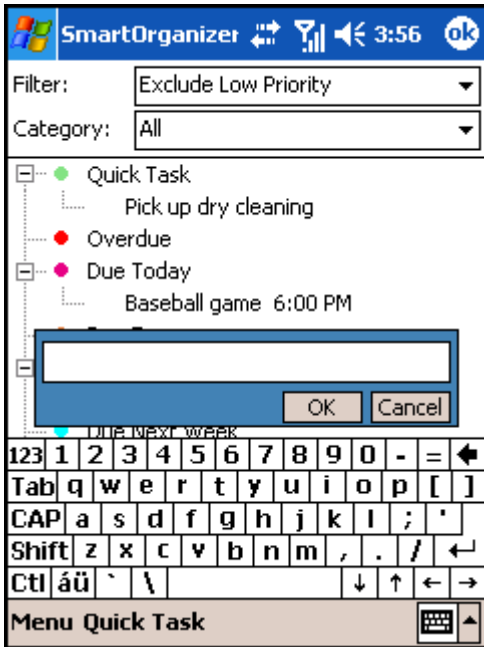


For re-occurring events, you press and hold the stylus on “Occurs” list box. A pop-up menu will show up. You then click on “Add Pattern”.



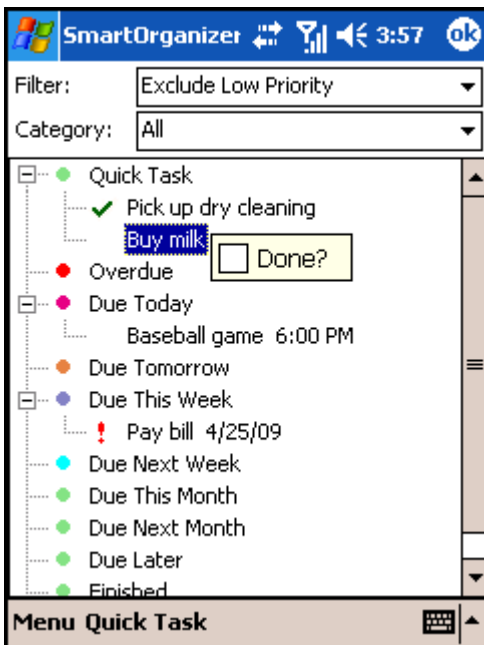
There are four tabs: “Daily”, “Weekly”, “Monthly” and “Yearly”. See the example in the screen shot.

There is one trick about the re-occurring events/tasks. Normally, when a re-occurring event passed its current due date, it will automatically change to the next due date. But for an important re-occurring task, you want set its priority to “High”, so when it passed the due date, it will stay in the “Overdue” section until you check the checkbox in front of it in the list view or set the “Progress” to 100% or check the “Done” check box in the detail view.



[NEW]

A new menu item “Quick Task” has been added to allow you to enter a simple task quickly. The task entered here will not have a due date/start time and it will fall under “Quick Task” category.

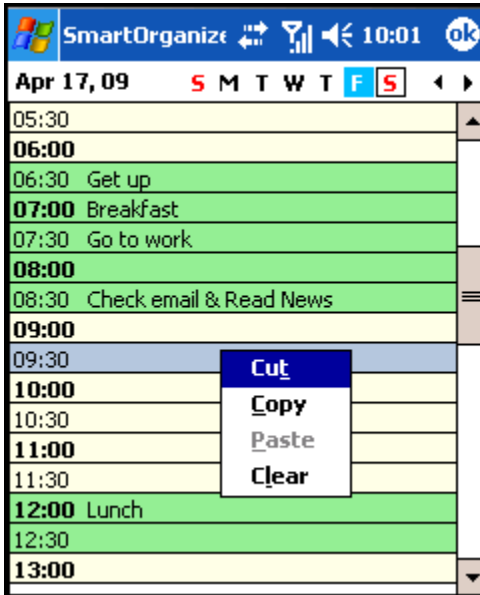


[NEW]

You can now click on a task, a little popup box will show up. You can check the “Done?” checkbox to mark it finished. A little green check icon will be displayed in front of that task.

Then you can click on “Refresh”, you will notice the one-time tasks will fall under “Finished” category and recurring tasks will move to next effective date. You can uncheck tasks in Finished category to move it back.

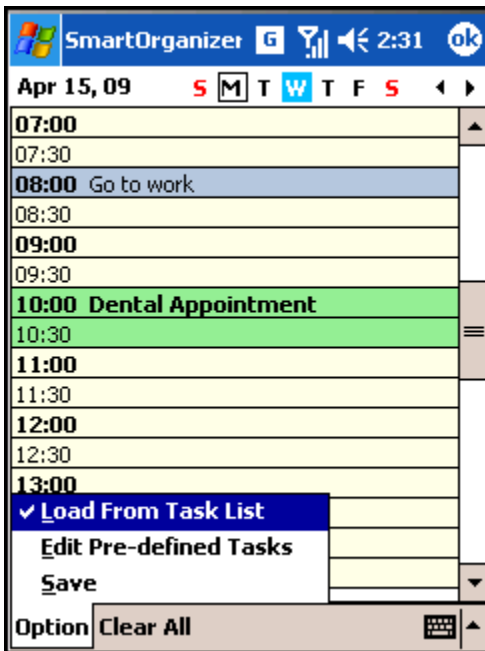
DailyScheduler



DailyScheduler is a tool to help you maintain your schedule more efficiently. There are pre-defined tasks you can choose from or you can enter your own. You can set up the scheduled tasks as one time, every day, every weekday or every weekend.

[NEW]

You can now move items around by using copy/paste popup menu(context menu)



You can use it along with the Task List. To load tasks from your Task List, you just click on “Load From Task list” from the menu.

Each time slot will only show one item. If you scheduled more than one items to a slot, the display priority will be One Time Item > Task > Day Patter > Every Weekday/Every Weekend Day > Every day.

For example: if you have scheduled lunch at 12:00 every day and on Monday you scheduled an errand at the same time. You will see that errand on Monday and lunch on other days.



To edit the daily schedule, you just click on a time slot. The detail window will allow you to edit subject, duration and type. To clear, you may click on “Clear” button. You may also enter notes for a task.

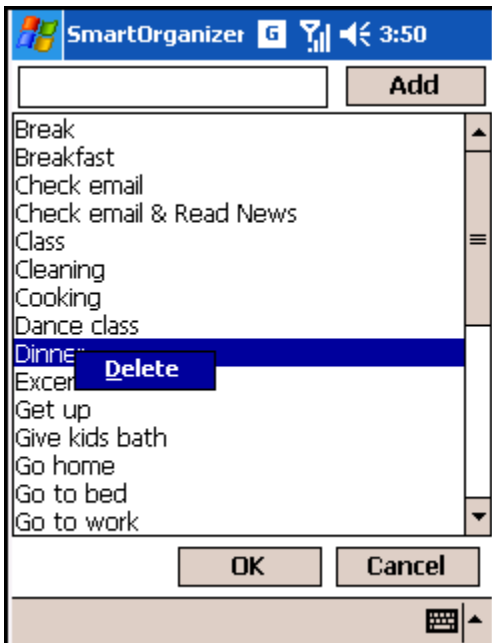
[NEW]

You can use pre-defined tasks or enter it directly in the subject field. Any “Quick Tasks” you entered in the Task List will also be loaded in the dropdown list for your convenience.

[NEW]

Now you can choose any combination of a day of a week for recurring item.

If you have more complex pattern than we provided here, you may want to use “Task List” to schedule it.



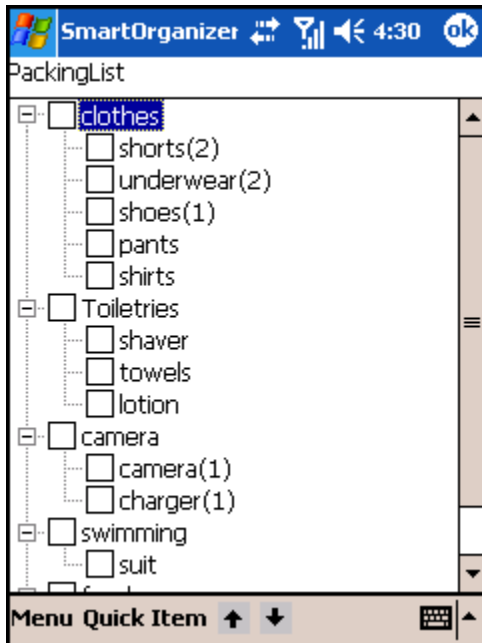
[NEW]

To edit Pre-Defined task list, you click on “Option” > “Edit Pre-defined Tasks” from the daily schedule view.

Type task in the text box on the top of the screen and click on “Add” to add a new task.

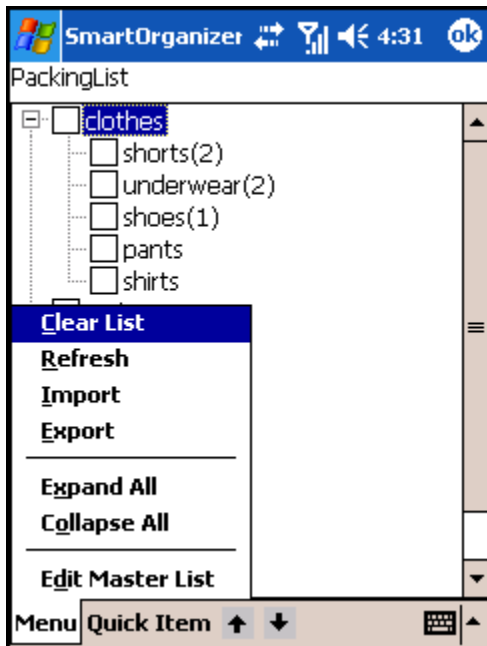
Tap and hold the stylus on an item and click on “Delete” to delete a task.

Packing List



Packing list is a useful tool to help you to create a packing list. You can simply create a packing list by adding items to it. It contains categories and items.

You can re-arrange the order of the items/categories by highlighting it and click on up/down arrow on the menu bar.

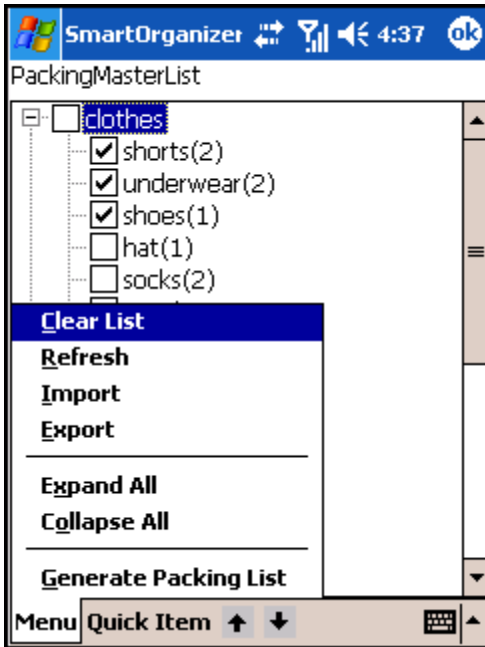


The nice thing about this tool is you can use it to create a master packing list for all your possible trips. Then use the master list to easily generate packing list for your next trip.

Click on "Menu">"Edit Master List", the PackingMasterList view will show up.

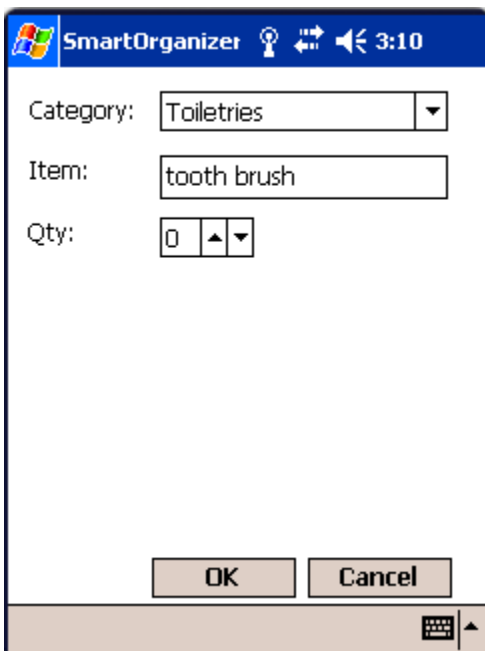
[NEW]

The system has pre-defined PackingMasterList.xml for your convenience. It will be automatically loaded if you don't have one created using previous version of SmartOrganizer. If you want to load the system list, go to the main menu screen, click on "Option">"Load Pre-defined Lists"



On the left is the PackingMasterList view. It looks just like the Packing List view. You can add/edit/delete items.

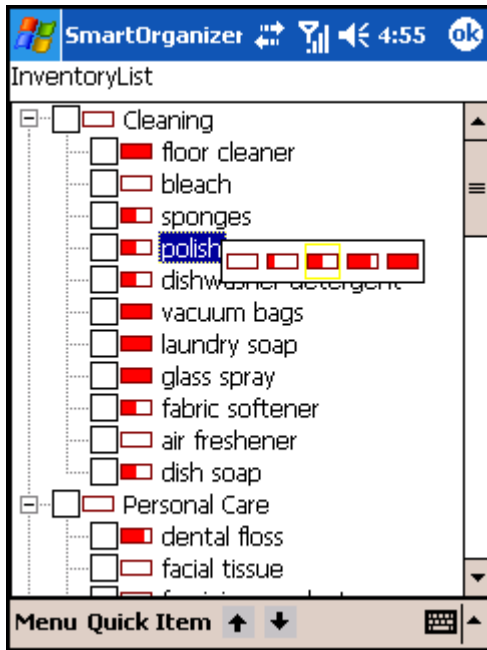
To generate packing list, you check the check box for each item you want and then click on “Generate Packing List”. Click “OK” to go back to the Packing List view. You will have a packing list ready in no time.



To Add a new item, tap and hold the stylus on the list, click on “Add” menu item from popup menu.

To Edit/Delete an item/category, tap and hold over the item/category and then click on “Edit” or “Delete” from popup menu.

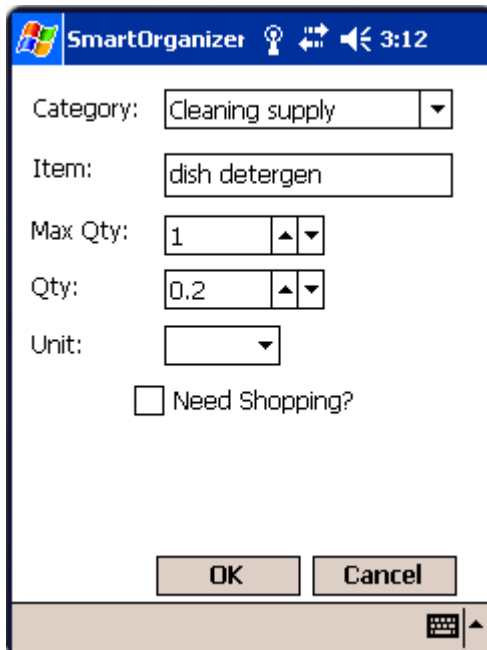
Inventory Manager



Inventory Manager is a tool to help you manage your inventory. It can be used for home or work. It is even more useful if you use it along with the Shopping List in this SmartOrganizer. It contains categories and items. When you setup the list, you may enter the Max Qty and the current Qty. Then the list will use little icon to give you visualized result of your inventory.

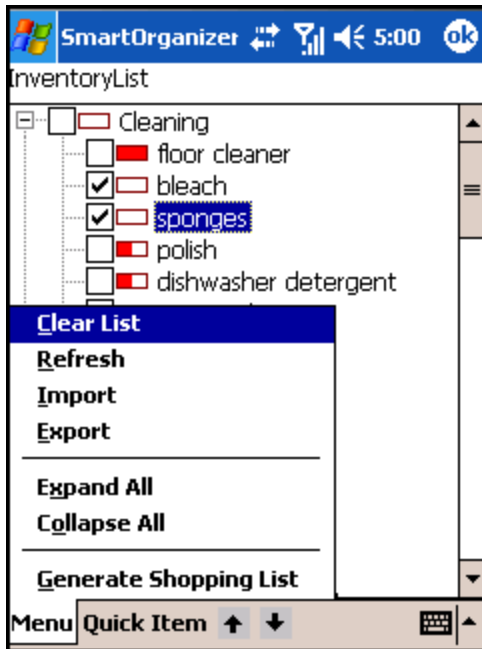
[NEW]

In the new version, when you click on an item, a little quantity box will show up. You can then click on an icon to edit the current quantity without going to the detail view.



To Add a new item, tap and hold the stylus on the list, click on “Add” menu item from popup menu.

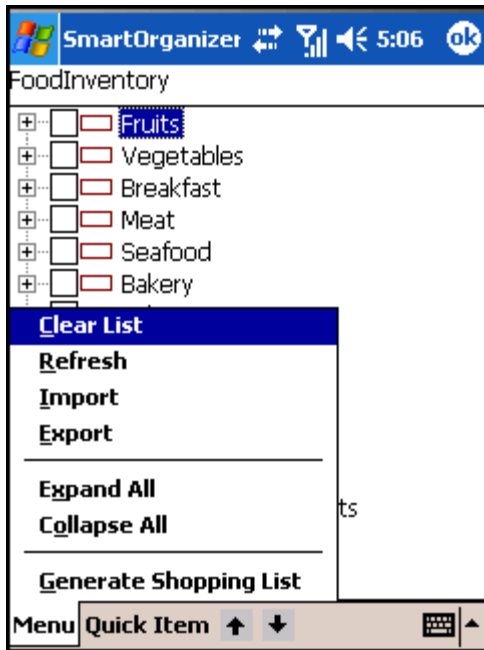
To Edit/Delete an item/category, tap and hold over the item/category and then click on “Edit” or “Delete” from popup menu.



When you done inventorying, you can use it to create shopping list by checking the check box in front of the item or the check box of “Need Shopping?” in the item detail view and clicking on “Generate Shopping List” menu item.

If you already have a shopping list, when you choose to “Generate Shopping List”, it will ask you whether you want to add selected items to your current shopping list or to overwrite it.

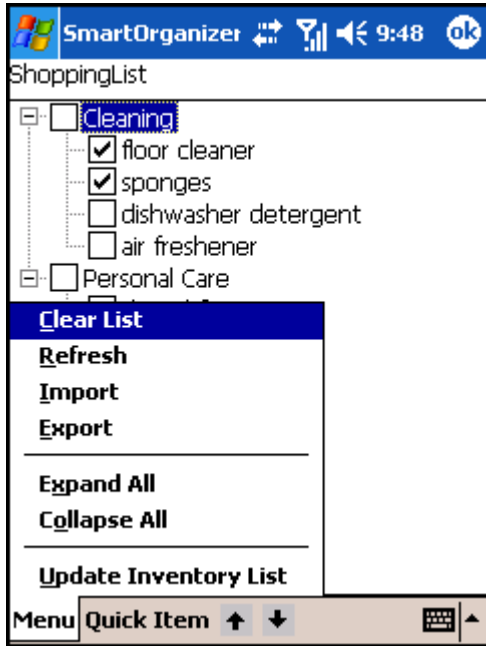
Food Inventory



Food Inventory is as same as the Inventory Manager. But you should use it for food items only because it will be used in combination with the Recipe Box and Meal Planner.

You can also generate/update Shopping List from here.

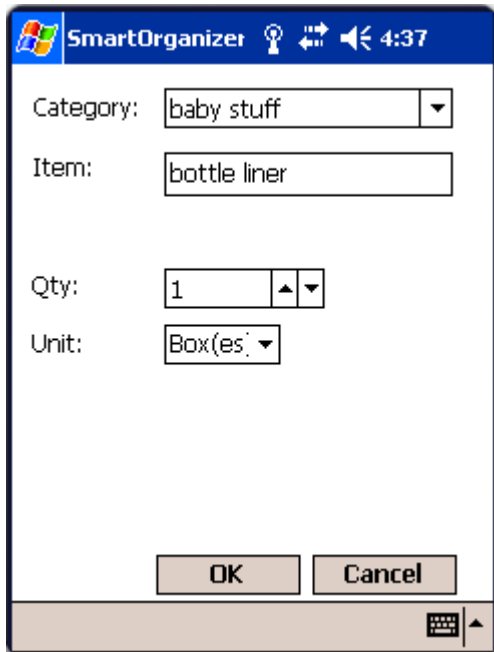
Shopping List



Everybody knows what a shopping list is. You may use this tool to create your shopping list or you can use Inventory Manager to generate a shopping list for you.

[NEW]

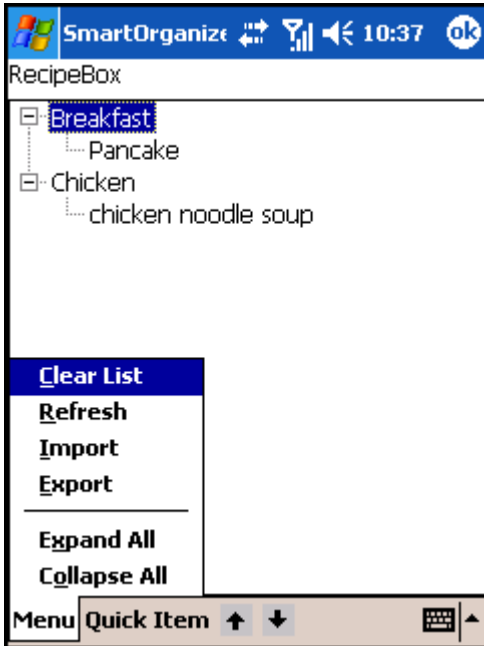
Now you can update Inventory List after you done shopping. Click on “Menu”>”Update Inventory List”, the application will automatically set the quantity of the checked items to the max quantity in your Food and Other Inventory Lists if they exist in those lists, so you don’t have to manually update them. That will save you a lot of time.



To Add a new item, tap and hold the stylus on the list, click on “Add” menu item from popup menu.

To Edit/Delete an item/category, tap and hold over the item/category and then click on “Edit” or “Delete” from popup menu.

Recipe Box

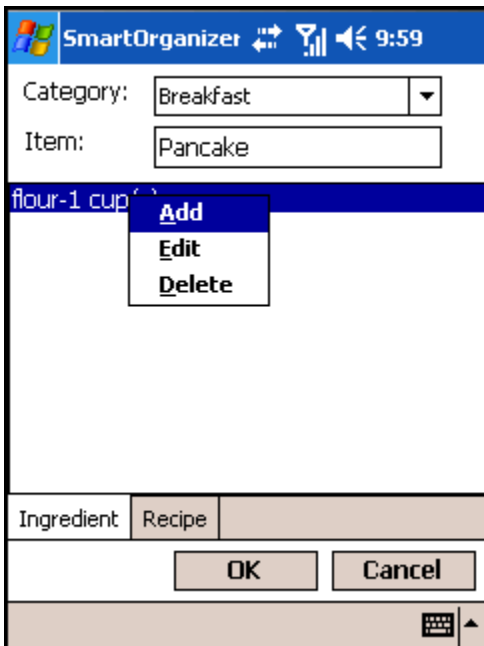


Recipe Box is a tool to help you to organize your recipes.

This tool can be used along with your “Meal Planner”. See detail in “Meal Planner” section.

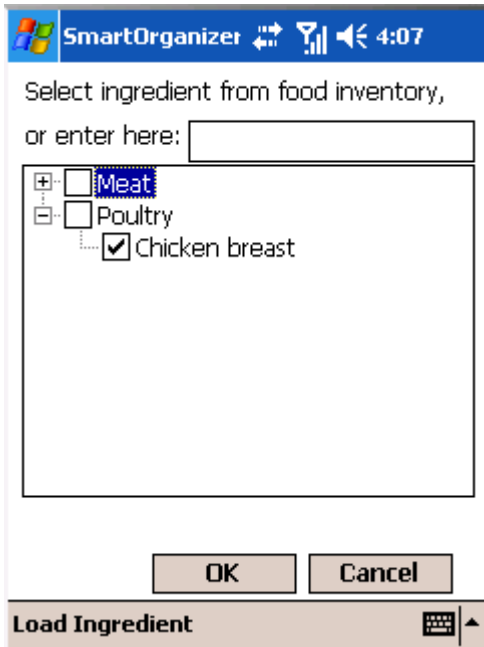
To Add a new item, tap and hold the stylus on the list, click on “Add” menu item from popup menu.

To Edit/Delete an item/category, tap and hold over the item/category and then click on “Edit” or “Delete” from popup menu.



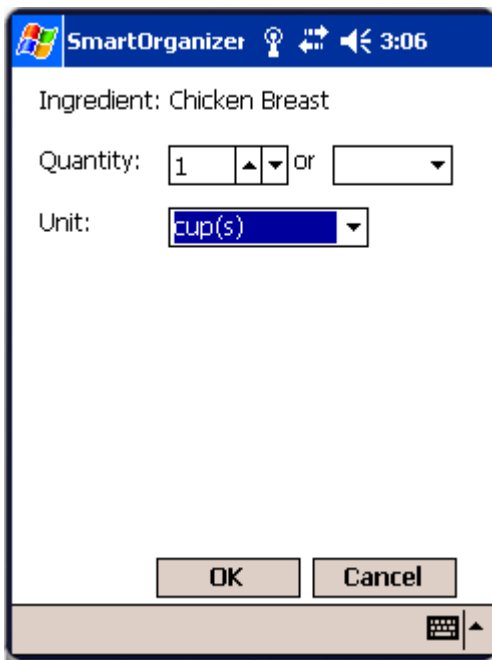
It has two tabs in its detail view. The “Recipe” tab is for you to enter free format text. The “Ingredient” tab will show you all the ingredient for the recipe.

Place your stylus inside the Ingredient box. Tap and hold it. The popup menu will show up. You can then add/edit/delete ingredient. It will open the ingredient list view.




In the ingredient list view, you may choose an ingredient from the list or enter any ingredient in free format text.

When you check the ingredient check box, the ingredient detail view will show up, so you can edit the quantity.



Meal Planner

	Breakfast	Lunch	Dinner
S	Orange juice, Pan cake	Hamburger	
M			
T			
W			
T			
F			
S			

Clear Option  ▲

Meal Planner is a tool to help you to plan your meal weekly. It is better use the “Recipe Box” along with it so you don’t have to type in the entry name each time.

You don’t have to enter Ingredient/Recipe detail for an entry in the “Recipe Box”. As long as you have category and name entered, you can use them in “Meal Planner”

You may clear a cell by clicking “Clear”>”Clear cell” menu. Click on header then click on “Clear”>”Clear column” to clear whole column. Click on day field then click “Clear”>”Clear row” to clear meal for the day.

You also have the option to change the font size.


Sunday Breakfast

Pancake

flour-1 cup(s)

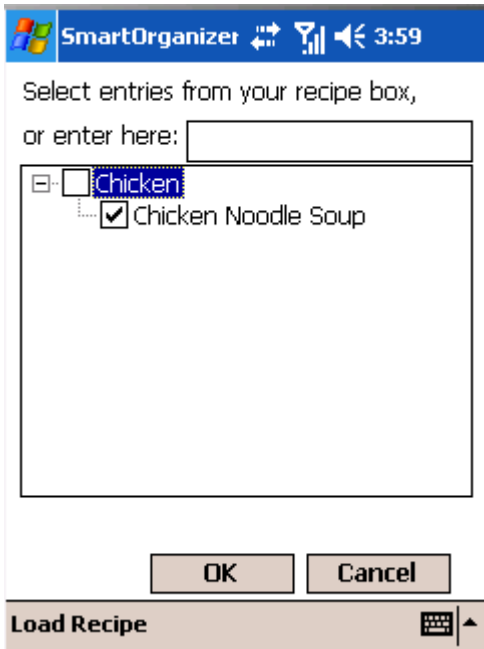
Ingredient	Recipe	Note

OK

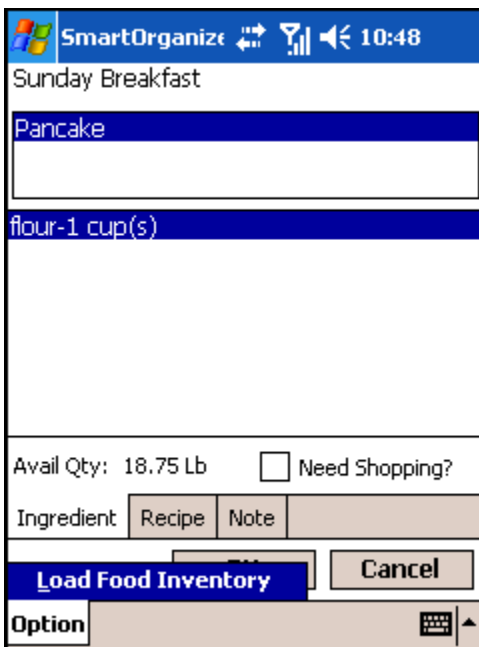
Option  ▲

You can edit a meal by clicking on the desired box. The detail window will show up. You will need to have your recipe box setup before using this tool.

Tab and hold on the top box, you will see a popup menu. You may click on “Add” or “Delete” to add or delete entries.



After click on “Add” from above view, the recipe list will show up. You may select entries by check the check boxes. They will be added to the list box at the top of the detail view. Or you can enter free format text in the textbox.



You may highlight an entry to see its ingredient and recipe. If you have your Food Inventory List loaded, you can also view your inventory by highlighting the ingredient. If you need shopping for that item, you can simply check “Need Shopping” check box. When you go back to your Food Inventory List, you can generate the shopping list for your meal.