SmartOrganizer 3.3 Help

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3.3 Release Notes

- Added outlook synchronization in daily scheduler for device running Windows Mobile 5 and above
- Fixed the sync issue between task list and daily scheduler
- Fixed many bugs with display and copy/paste item in daily scheduler
- Display all occurrences in a recurring task/appointment instead of the just the first one
- Allow user to enter date/time when creating a new item in daily scheduler
- Added store and price entries in inventory and shopping lists. The application records up to 5 entries for each item.
- Fixed issue with task notification
- Fixed issue with DateTime picker in task list
- Many other minor bug fixes

New features are marked [NEW in 3.3] in the following user guide. Some of the screen shots in this file are from previous versions.

3.2 Release Notes

- Add progress percentage to task list
- Allow multiple entries on one time slot in Daily Scheduler
- Add "Shop Qty" and "Qty" quick edit in inventory list
- Allow user to choose between graphical inventory and more accurate inventory
- Update quantity in inventory list from shopping list
- Change the DateTime picker in task list to use standard DateTime picker. (The old DateTime picker doesn't work on some devices)
- Update all the images to higher resolution

New features are marked [NEW in 3.2] in the following user guide. Some of the screen shots in this file are from previous versions.

3.1 Release Notes

SmartOrganizer 3.1 contains various bug fix and improvement. They include:

- Add notification for Task List. SmartOrganizer will remind user 15 minutes before a task/appointment is due.
- Consolidate popup control and menu when there are both. For example, when click on a task in the task list, the edit/delete menu will show up along with the “Done” check box. You don’t have to tap and hold the stylus anymore.
- Move the “New” menu from popup menu to main menu bar for easy access
- Move filter and category to menu to increase the display area for Task List
- User can edit items right on the DailyScheduler list screen instead open the detail window, but you can still access the detail window by clicking on the time
- Add “Uncheck All” menu item

- Change time field display from military time to regular time
- Fix date format issue for international region settings

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

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 recurring 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 recurring events. They are grouped by due date. The task list will also automatically calculate the next due date for recurring event.

[NEW in 3.3]
For recurring event, it will display the whole series instead of just the first occurrence.
"Quick Task" is renamed to "To-do"

[NEW in 3.2]
The task item now displays the progress percentage in the list.

SmartOrganizer can notify user when a task/appointment is due. It will pop up a bubble 15 minutes before the due time. If you click "Done", it will update the item's finished date time. If you click on "Snooze", the bubble will minimize to small icon on the top of the screen.

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.

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

You may create new task/appointment by clicking on “New” from the menu bar. To edit or delete an existing one, you just click on the task 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.

[NEW in 3.2]
Since the old Date picker doesn’t work on some devices, it is changed to use Microsoft standard DateTime picker. **To clear a date field, you need to tap and hold the stylus on the field and choose “Clear” from the popup menu.**

[NEW in 3.3]
Fixed issues with the DateTime picker.

For recurring 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 recurring events/tasks. Normally, when a recurring event passed its current due date, it will automatically change to the next due date. But for an important recurring 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 in 3.3]

The “Quick Task” has been renamed to “To-do”. A “To-do” task is a task with only a name. No due date or other information assigned. It will be put on the top of the list. You can leave it there or assign due date later.

When you click on a task, a little popup box will show up. You can check the "Done?" checkbox to mark it as 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.

[NEW in 3.2]
You can now also set the progress percentage in the pop-up menu.

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.

To move an item around, you can tap and hold an item and use copy/paste from popup 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.

[NEW in 3.2]
Multiple entries are allowed to be entered on one time slot.
To add an item, tap anywhere on the time slot. To add another item on the same slot, tap the time area on the left.
To edit an existing item, tap anywhere within the item rectangle.

[NEW in 3.3]
For devices running on Windows Mobile 5 and above, you can now synchronize with Outlook appointment on your device. However, it is one-way sync. You will not be able to edit it from DailyScheduler

To edit an item, click on anywhere within the item's rectangle. 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 in 3.3]
You can enter date/time in the detail window for quick scheduling.

You can use pre-defined tasks or enter it directly in the subject field. Any tasks in "To-do" or tasks with no particular time assigned in the Task List will also be loaded in the dropdown list for your convenience.

You may also edit a non-recurring task in DailyScheduler

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

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.

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.

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.

[NEW in 3.2]
The default quick edit for quantity is changed to the quantity up/down for more accurate input. But you can go to “Menu” to change the default settings by check “Graphical Inventory”.

[NEW in 3.3]
You can now record the prices for an item. It will save last 5 prices you entered. You can easily check and compare prices from Inventory List and Shopping List

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.

[NEW in 3.2]
You can now edit shop qty as well. It can also be edited when you check the checkbox from the inventory list. See screenshot below.

[NEW in 3.3]
You can enter store and price for an item. (Note: the Store field is an editable drop down list. You can enter new store if it is not in the list and it will be added to the drop down for later editing)

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.

[NEW in 3.2]
When check an item for generating the shopping list, a little dialog will pop-up to allow you to edit shop qty.

To generate shopping list, 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.

When you done shopping, you can easily update Inventory List. 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.

[NEW in 3.2]
When updating the inventory list, the program will add the shop qty to existing qty to get more accurate result instead of setting it the max quantity.

[NEW in 3.3]
When user check an item off the list, a popup dialog will allow user to enter store and price. It also lists the previous prices.

The price history will also be displayed when the user clicks on an item.

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.

[NEW in 3.3]
User can edit store and price in this window as well

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. Tab 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

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.

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.