LoanMemo

P R O

Version 2.1

User Manual

Exedria Software

www.exedria.com

This manual was written for use with the LoanMemo Pro software version 2.1.

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Chapter 1

Introducing LoanMemo Pro

Introduction and Features

LoanMemo is the perfect solution to manage your loans in a thorough, accurate way with all the support of an integrated system assisting you step by step and making it easy to organize, browse, filter and keep under control your sensitive data. LoanMemo features an automatic system that checks the status of your items real-time, making calculations of due-dates and delays and reporting missing data. LoanMemo also provides a statistics module to automatically report, globally or by category, the number of items returned with their percentages, total amount of returned and not returned money and a general view of all your archives. Custom fields, adding all the freedom you need to adapt the program to your specific needs, and many other features to discover, make of LoanMemo the best solution available today to keep track of your items and your money with your handheld.

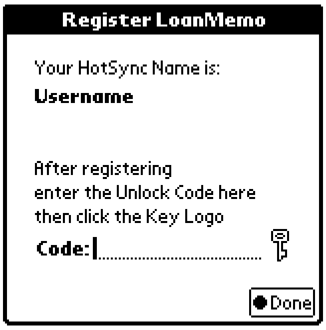
Features

- Independent sections for In and Out items.
- Monetary and non-monetary loans.
- Card View. Add and browse your Items in the classic way.
- List View. Browse your Item list in the most immediate way: the list.
- Fully editable and independent Categories for both sections.
- Many fields for all your needs.
- Condition of the Item. Choose among 4 different levels.
- Look Up function for Date and Due Date.
- Two customizable fields for your own needs.
- Two customizable checkboxes.
- ActySmart System analyzing your sensitive data real-time.
- Due Data facilities.
- Advanced/Basic Mode. Personalize LoanMemo the way you want.
- Selective Sub-Filters for unreturned Items.
- Separate Statistics for In and Out sections with automatic calculation of totals for returned and not returned money.
- Original Icon-Oriented Interface.

How to Register Your Copy of LoanMemo Pro

The Demo version of LoanMemo Pro expires after 15 days of use and it allows a limitated number of Items. Registering LoanMemo Pro will give you the full version of the program and unlimited lifetime upgrades. Registering your own copy of LoanMemo Pro is simple. Follow the next steps:

- Register LoanMemo Pro following the detailed instructions you will find reading the file ***Register.txt*** included in this package or visiting our Web Site at www.Exedria.com
- In the Main Menu of LoanMemo Pro click on the ***-i-*** simbol that you will find at the centered-bottom of the screen. Then click on the Register Button and write down the *HotSync Name* **exactly** as it is shown in bold at the top of the screen.



- Contact us by sending a short note by E-mail to the address support@exedria.com including your full name, E-mail address (the one used when you registered LoanMemo Pro) and the *HotSync Name*. *The Unlock Code* will be sent to you by E-mail.
- Go back to the *Register LoanMemo Pro* screen the way you did before and copy the *Unlock Code* you just received in the field named **Code**.
- Tap on the **Key Logo** and enjoy your Registered Version!

Technical Support

For help, questions or just to let us know your opinion about our software solutions, please contact us by visiting our Web Site at http://www.exedria.com or writing directly to our email address at:

support@exedria.com

Chapter 2

Getting Started with LoanMemo Pro

Before Installing LoanMemo Pro

Due to the many improvements and in order to make the program fully compatible with the new versions of the Operating System, the current version of LoanMemo Pro (Version 2.1) is not compatible with the previous 2.0 Version. If LoanMemo Pro 2.0 is installed on your handheld, you should delete the old version before installing the new one. Anyway, in order to ensure you don't loose your data, it is possible to have both 2.0 and 2.1 versions installed on your handheld for all the time needed to copy/paste your information in the new version.

IMPORTANT NOTE. Deleting LoanMemo Pro 2.0 before copying your data to the new 2.1 version will cause you to lose all the information recorded using the previous version of the program. We suggest you to keep LoanMemo 2.0 installed while installing the new 2.1 version in order to copy/paste your sensitive data before you proceed.

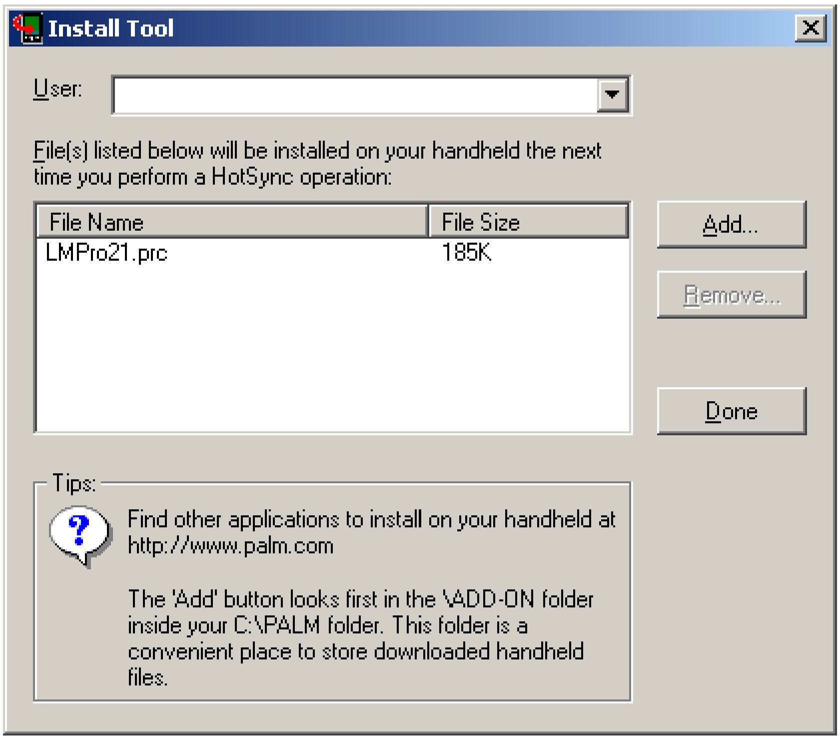
To delete the previous version of LoanMemo 2.0 from your handheld, follow these instructions:

1. Tap the **Menu** icon on the handheld application main screen.
2. Select **Delete**.
3. Select *LoanMemo* from the delete list.
4. Tap the **Delete** button.
5. Tap **Yes** to confirm that you want to delete LoanMemo 2.0.
6. Tap the **Done** button to return to the application main screen.

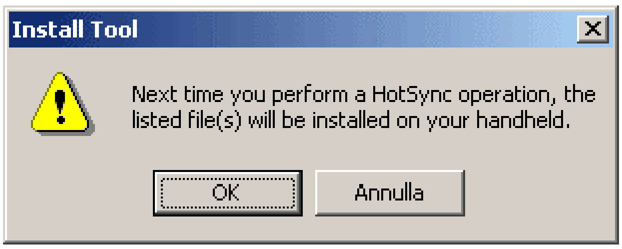
How to Install LoanMemo Pro 2.1 on your handheld

To install LoanMemo Pro 2.1 on your handheld follow the next steps:

1. Start HotSync Manager, if it is not already running, by opening the Windows **Start** menu, selecting **Programs**, selecting the handheld's menu folder (for example, **PalmPilot Desktop**), and then selecting **HotSync Manager**.
2. Inside the LoanMemo Pro folder, click or double-click (depending on your Windows version) on the *LMPro21.prc* file, this will open the **Install Tool** dialog box (if that doesn't happen then start the **Install Tool** by selecting it from the **Start** menu > **Programs** > **Install Tool**).



3. If there is more than one user for the handheld, select the appropriate name from the **User** drop list and click **Done**. You will then see a message like the one shown in the next box.



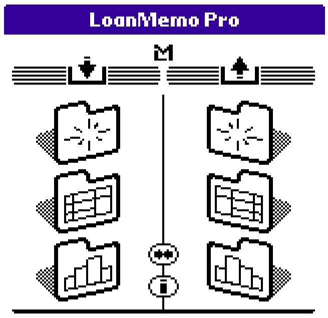
4. Click **OK**.
5. Place your handheld in its cradle and press the **HotSync** button.
6. When the HotSync session is complete, remove the handheld from the cradle and tap the **Application** button with your stylus. The *LM Pro Install* icon should now be displayed on the handheld's application selection screen. Tap the icon to install and run LoanMemo Pro.

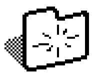
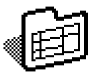
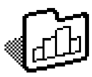
Chapter 3

Using LoanMemo Pro

The Main Menu

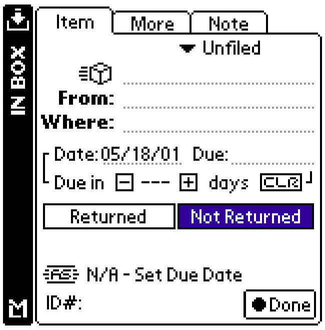
The Main Menu is the Control Center of LoanMemo Pro. The screen is divided in two sections: the **In Box** at the left and the **Out Box** at the right. Each section is connected with an independent database so you can manage your entries with maximum freedom and flexibility. Let's take a look in detail.

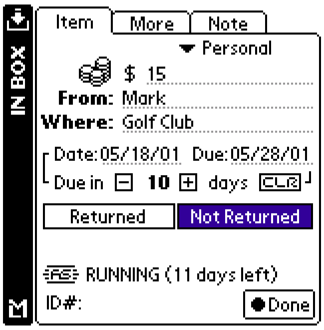


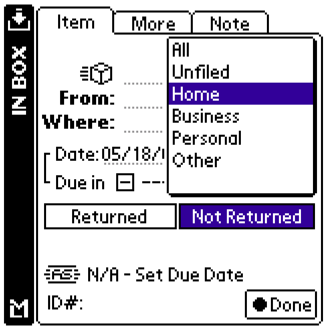
Icon	Description
	**In Box Section**. Use this side of the screen for Items you borrow.
	**Out Box Section**. Use this side of the screen for Items you loan.
	**Create New Card**. Use this Button to create a New Card in the corresponding Section (both In and Out Sections).
	**List View**. Use this Button to access to the List of your Items for the corresponding Section (both In and Out).
	**Statistics**. Tap this Button to show the Statistics for the corresponding Section (both In and Out).
	**Preferences**. Tap this Button to View or Modify the preferences of LoanMemo Pro.
	**Info & Register**. Tap this Button to access the information pages and register your copy of LoanMemo Pro.

Create a New Card

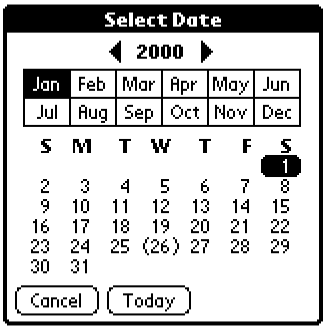
From the **Main Menu** tapping on the **Create New Card** will access the form for adding a new record to the selected database. The number of elements of this page can change, depending on the current settings of the program (see the section of this manual about **Preferences** for further information). We will refer to the program having all the features turned **on**, which is the default when you first run LoanMemo Pro on your handheld.





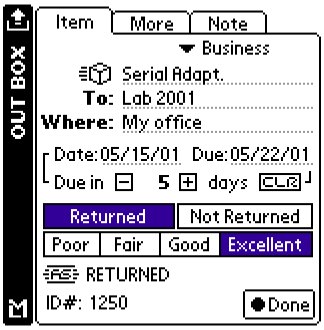


- **Start adding Information.** Let's start adding information for the new Item. We can start to insert information in any order, starting from the Due Date or the Status for instance, then completing the other fields or leaving part of them blank for a further editing.
- **Non-monetary or monetary.** Tap the icon to switch between non-monetary () and monetary () items. When you choose the monetary type, LoanMemo Pro will be able to keep track of your money calculating statistics and totals for returned and not returned money. See the section about Statistics for more information.
- **Category and starting Date.** When you Create a New Card from the Main Menu of LoanMemo Pro, by default the selected Category is *Unfiled* and the current Status of Item is *Not Returned*. We assume that, creating a New Card, you are starting to keep track of an Item you have just borrowed or loaned. By consequence, also the default Date is set to the current one. Naturally you can change both **Category** and **Date** whenever you want and following your needs. To **change the Category** just tap with your stylus on the little triangle at the top of the screen, then select the appropriate category from the Drop List. To **Change the Date** tap on the Date field, then select the start Date using the LookUp function of your handheld.



- **Due Date.** The field named **Due** is one of the most important because it makes LoanMemo Pro track the status of your Items automatically using the **ActySmart System** (when activated in **Preferences**). There are basically two ways to **set the Due Date**. The first is to tap the Due Date field with your stylus, then select the Due Date using the LookUp function; the second is to use the **Due Date Facility** provided by LoanMemo Pro. Using the second method all that you have to do to set the correct due date is to tap on the **Due in** field, insert the number of days you want the Due Date delayed from the selected starting Date, then tap the **Set Button** to have LoanMemo Pro calculate the exact Due Date for you. You can also use the **Clr Button** *(Clear Button)* to reset the Due Date field. There are just two important things to remember: the Due Date set using the **Due Date Facility** is **always** calculated referring to the starting **Date** field; after selecting the number of days you must always tap the **Set Button** to see the changes in effect. It is also possible to **leave the Due Date field blank**, the program offers a way to keep track and search for Items with a blank Due Date using the **Sub-Filters** capability in the **List Format** (see that section of the manual for further information). This way it is easy to find and complete information for that class of Items.

- **Status.** Select here the current status of Item: **Returned** or **Not Returned**. Tapping **Returned** you have the possiblity to track even the **Condition** of the Item (available only if activated in **Preferences**) selecting one of the four choices (**Poor, Fair, Good, Excellent**).



ActySmart

The **ActySmart System** is a powerful and automatic system actively monitoring the status of your Items. It basically works like an Assistant automatically analyzing your data and showing you the results in a quick and easy format. ActySmart System provides you the fastest way to know the exact status of your Item and at first glance.

ActySmart is active in Card and List View and it can be found at the top-right of the screen in Card format and at the bottom-left for the List format. ActySmart upgrades its status every time you enter or modify sensitive data for the Item and provides the following categories of information:

- **Returned**. The Item has already been Returned.
- **Not Available**. There are no available information for the selected Item because the Due Date has not been set up.
- **Running**. The countdown to the Due Date is actually running. The second line shows the days left.
- **Expired**. The Due Date for that Item has already expired. The second line shows how many days past due.

Adding More Information

Tapping the **More** Tab, located at the top of the In/Out Card, you open a form where it is possible to add more information to the current Item.

A the top of the screen, under the label, LoanMemo Pro performs a LookUp in the **From/To** field you have already edited in the previous screen, remembering who or what you are adding information for.

You are absolutely free to insert data the way you want and in any order.

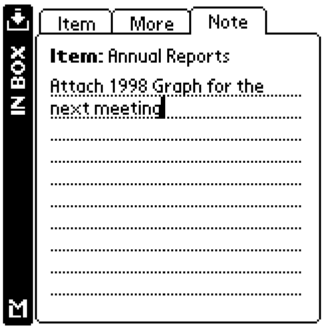
Custom fields and checkboxes

The **More** screen is also the place where, when this option is activated in **Preferences**, you can edit the information about the set of Custom Fields and Checkboxes. They represent a great way LoanMemo Pro can suit your needs. You have a couple of fields and checkboxes you can easily label and use with complete freedom the way you prefer. For instance, you can use the fields to add further comments about the Item and the checkboxes to remind you of a particular detail, like to call before, or any technical information you like. When completed, tap the **Done** button to go back to the Card page.

NOTE. The first time LoanMemo Pro runs on your handheld, labels for the custom fields are set up to generic ones. To replace them, open the **Preferences** screen from the **Main Menu**, then change the labels the way you want.

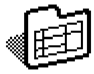
Adding Notes

Another page you can access from the Card Format is **Notes**. Here you have plenty of space where you can add your comments for the selected Item. The first line, under the label, shows you the current Item you are adding notes to. When completed tap the **Done** button to go back to the Card page.

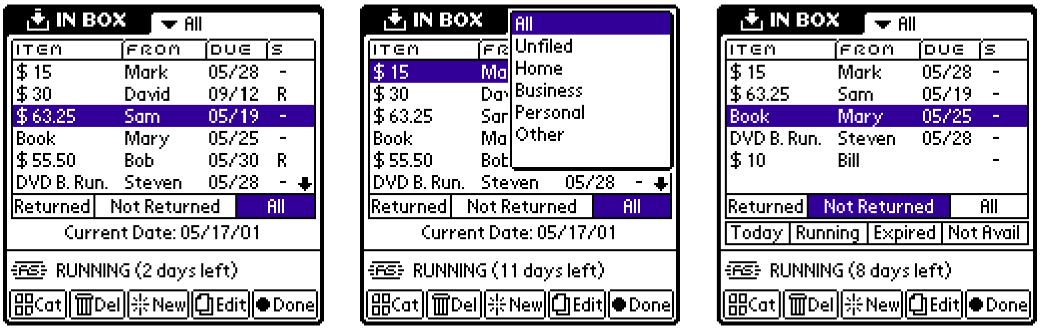


List View

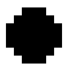
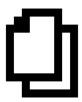
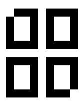
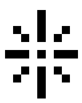
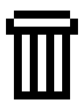
From the **Main Menu**, tapping on the **List View** you will access a form where records are shown in list format. That allows the full list of Items for the selected Category to be easily displayed, as well as filter them using the different filters and Sub-Filters that LoanMemo Pro provides.



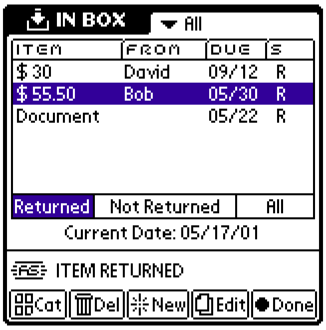
The screen is basically divided in two regions. At the top you can see the List Box containing Items responding to the current Category and filters. The List Box is divided in columns, showing from the left to the right: **Item**, **From/To**, **Due Date** and **Status**. In the **Status Column**, already returned Items are marked with " **R** ", not returned Items with " **–** ". That allows a global "panorama" of the entire contents of the In/Out Database.



The second region of the screen in the List View hosts the filters for **Returned**, **Not Returned** and **All** Items; **Sub-Filters** (when activated in **Preferences**) for filtering Items according to their **Due Date**: **Today**, **Running**, **Expired** and **Not Available**. It also contains the **ActySmart** panel (when activated) and a set of buttons performing different actions:

Icon	Description
	**Done**. Use this Icon to save your data and go to the Main Menu.
	**Edit**. Tap this Icon to View/Edit the current Item, as selected on the List.
	**Categories**. Use this button to go to Category Editing for the current Section.
	**New Card**. Tap this Icon to **Create a New Card**. ***NOTE***. *The new Card will be created in the current Category.*
	**Delete Card**. Tap this Icon to Delete the current Card. Before erasing the record you will be asked for a confirmation.

The way the **List View** works is intuitive. Let's assume that we want to see all records in the *Business* category. First, we have to click the Drop List symbol (the little triangle) at the top of the screen and select the category *Business*, then, moving to the Filter line, check "All". Instantly the List Box will be upgraded and will show all the Items belonging to the category *Business*. In the same way, we can also filter the current list by **Returned** or **Not Returned** Items, by selecting the corresponding button.



Not Returned Sub-Filters

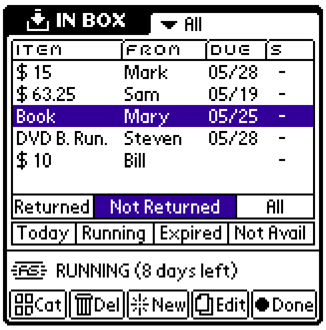
If **Sub-Filters** are activated (see **Preferences**) we also have the option to filter Items according to their **Due Date**. There are four possible choices for the Sub-Filters. Let's take a look in detail:

TODAY Shows Items whose Due Date is equal to the Current Date (Today's Month, Day and Year).

RUNNING Shows Items whose countdown to the Due Date is currently running. *NOTE: It will also include Items shown by the TODAY filter.*

EXPIRED Shows Items whose Due Date is prior the Current Date.

NOT AVAILABLE Shows Items whose Due Date is not available because it has not been set up yet.

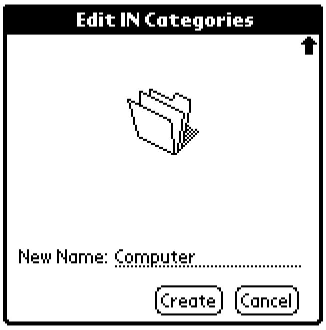


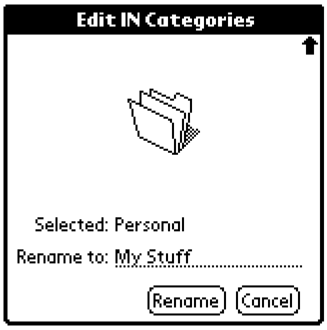
NOTE. Sub-Filters work **only** with **Not Returned** Items.

Using sinergistic Categories, Filters and Sub-Filter you will be able to easily find what you are searching for in the simplest and most intuitive way.

Categories Management

LoanMemo Pro provides two different Databases for In and Out Categories. That makes it possible to use separate Categories for the two Sections of the program, allowing you maximum flexibility in managing groups of Items. The way In and Out Categories work are identical so, for the purpose of this manual, we will analize in detail only one of them.





It is possible to access the **Categories** page from both Card and List view tapping the Category Icon located on the toolbar. The page for Category editing presents a List Box showing the existing Categories and a set of buttons performing different tasks. In detail:

NEW Create a **New Category**. The program will ask you to provide a New Name for the category, then tap **Create** to confirm or **Cancel** to cancel the operation.

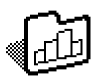
RENAME Rename the selected category. The user will be asked to provide a Name for renaming the existing category, then tap **Rename** to confirm or **Cancel** to leave the selected category untouched.

DELETE Delete the selected category. The user will be prompted for a confirmation before proceeding.

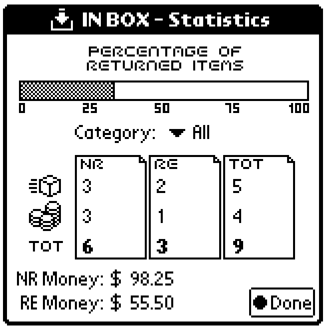
IMPORTANT NOTES. When an existing category is deleted, all the Items previously associated with that category will be moved to the category *Unfiled*. Categories *All* and *Unfiled* are reserved, therefore they cannot be deleted or renamed.

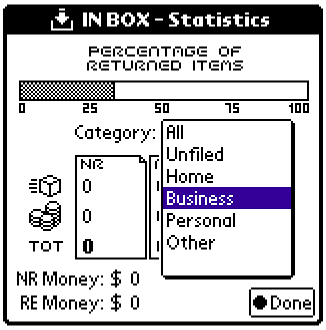
Statistics

LoanMemo Pro includes a statistic module for both the In and Out Section. Statistics are useful when you need to know, numerically, what is the overall situation of your Items. It is possible to access the Statistics page tapping the associated Icons, for both In and Out Sections, from the **Main Menu**.



Opening Statistics, LoanMemo Pro calculates, by default, the overall status of the selected database. The program shows a detailed matrix of data including the **total number** of non-monetary and monetary items, number of **Not Returned** Items and **Returned** Items. LoanMemo Pro will also calculate the total amount of not-returned and returned money for the selected category. At the top of the screen a **graphic bar** shows the percentage of Returned Items associated with the currently selected Category.

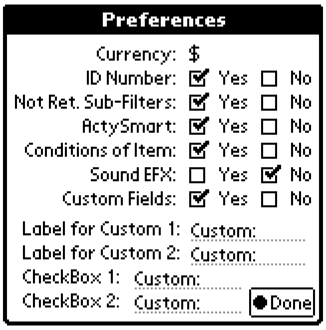


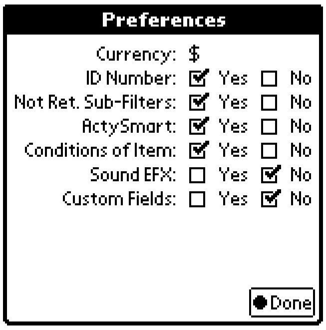


Changing the category in the **Category's Drop List** makes the program recalculate all the statistics for the selected category. That is particularly usefull when you need to take a look at what the exact status is for a particular group of Items.

Preferences

Selecting the **Preferences** icon from the Main Menu will allow you to set LoanMemo Pro's preferences. Different choices make it possible to use the program in different ways. Let's take a look in detail.





All the features are activated by default the first time LoanMemo Pro runs on your handheld, therefore the program runs in its advanced mode. To deactivate the different functions of the program, you just need to tap **Yes** or **No** for each of the five choices. Modification will take effect immediately.

Currency	**Insert/modify** your own curency symbol.
ID Number	**Activate/Deactivate** the field for the **ID Number** in Card format. *(useful when you need to assign an indentification number or a serial number to your Items)*

Not Returned Sub-Filters	**Activate/Deactivate** selective filters in List View for the **Not Returned** Items.
ActySmart System	**Activate/Deactivate** the **ActySmart System** in both List and Card format. (see the corresponding paragraph for details)
Conditions of Item	**Activate/Deactivate** the **Conditions of Item** in Card format.
Sound EFX	**Activate/Deactivate** sound effects
Custom fields	**Activate/Deactivate** the Custom Fields and lets you edit their own labels.

Quick Help

LoanMemo Pro provides a simple help page, accessible from the **LM** Icon in Main Menu and from the different ToolBars in Card and List Format, working as a quick reminder for the Icon-Oriented Interface of the program.