



SmartphoneNotes 3.0 Pocket PC Edition

User's guide

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1. Introduction

SmartphoneNotes is a text notes organizer for Windows Mobile devices. With SmartphoneNotes, you can easily create and manage text notes directly on your phone or PDA and synchronize them with Microsoft Outlook on your desktop computer. You can assign categories and change background color to your notes; a password protection function enables you to prevent unauthorized access to your notes.

1.1 System requirements

- Windows Mobile 5 for Pocket PC, Windows Mobile 6 Classic and Professional Edition, Windows Mobile 6.1 Classic and Professional Edition
- Microsoft Outlook, version 2002/XP, 2003 or 2007 (optional – required to synchronize notes)
- Microsoft ActiveSync, version 4.0 or later (version 4.5 is required for Outlook 2007 synchronization).
- or -
Windows Mobile Devices Center 6.1 (WMDC - required for synchronization on Windows Vista).
- PC: any PC and Microsoft Windows version supporting the above mentioned application

1.2 Before you begin

It is strongly recommended to create a backup copy of your Outlook Notes. There are many ways to do this; the most effective one is exporting your Notes folder to a Personal Folder file.

Consult Outlook Help or Outlook documentation to learn how to backup your notes.

1.3 Technical support

For installation problems and SmartphoneNotes troubleshooting, contact technical support at: product.support@syncdata.it

2. Installing SmartphoneNotes

1. Uninstall any previous version of SmartphoneNotes from the desktop/notebook PC and from the mobile device.
2. Make sure the mobile device is connected to your desktop/notebook PC.
3. Run the setup executable (setup_spn30.exe).
4. Follow the on-screen installation instructions until the installation process is finished.

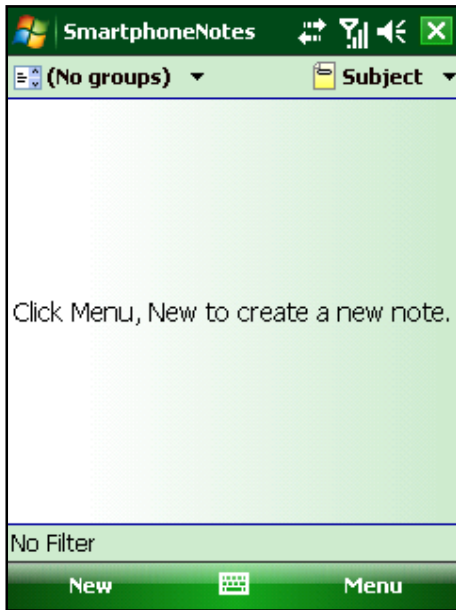
2.1 Registering SmartphoneNotes

To register SmartphoneNotes:

1. Open ActiveSync
2. Double-click the SmartphoneNotes icon. The SmartphoneNotes settings window appears.
3. Click the **About...** button to open the registration window. You can also click the Windows Start menu, select **Programs**, select SmartphoneNotes and click **Insert registration code**.
4. Click the **Register** button and type your registration code in the text field. If your Smartphone is connected, the registration code is saved in the phone. Otherwise, just click the **Save code to device** button at next synchronization (this button appears if there is a valid registration code in your desktop/notebook computer).

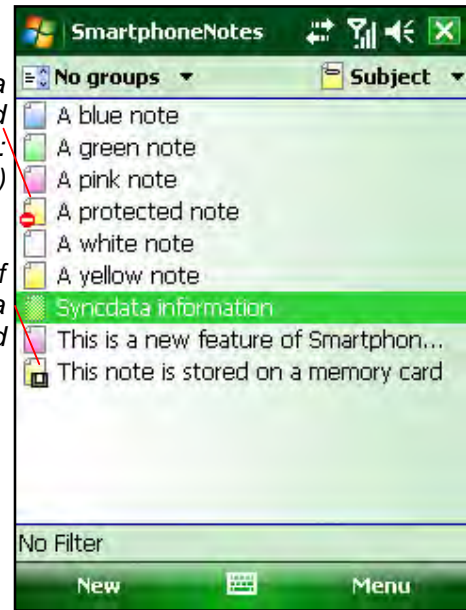
3. Using SmartphoneNotes on your Windows Mobile device

1. Tap the Windows Mobile **Start** icon on the top left corner of the Today screen and select **Programs**
2. Browse the programs list until you find **SmartphoneNotes**.
3. Tap the icon, or press the action key to run SmartphoneNotes.



This icon identifies a password protected note (see 3.5: "Protecting a note")

This icon appears if the note is stored on a memory card

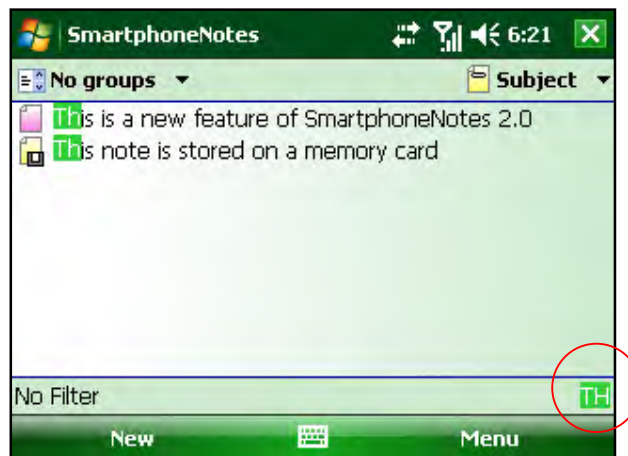


SmartphoneNotes the first time you use it

A list of notes.

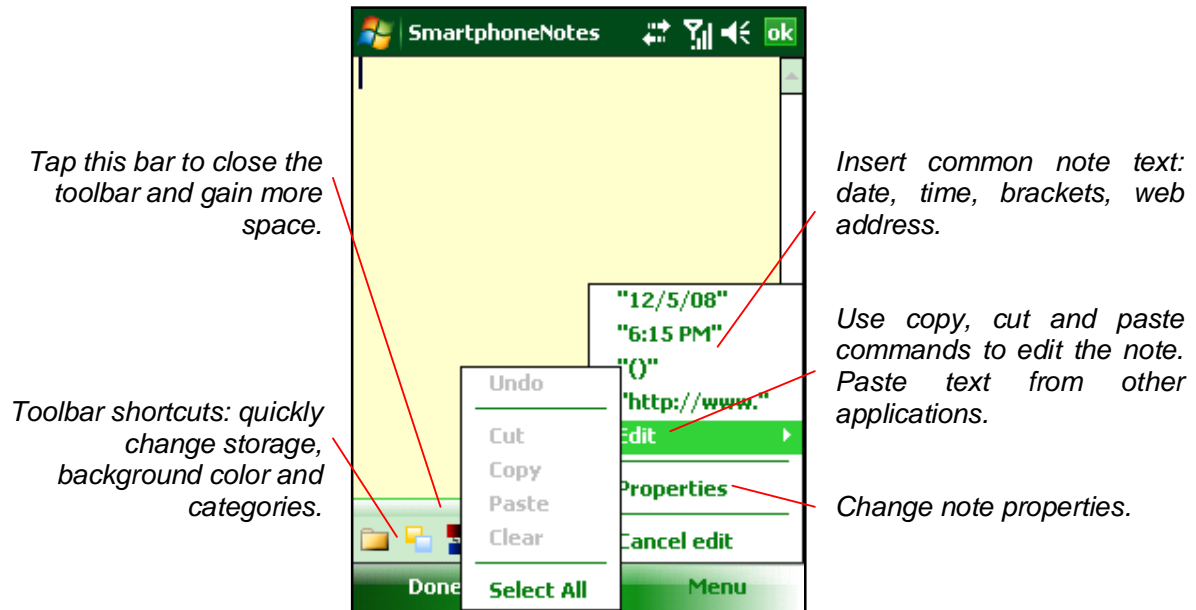
You can browse the list of notes using the up and down keys of the navigation pad. The "selected" note is highlighted. Use the left and right keys of the navigation pad to scroll pages instead of lines.

SmartphoneNotes 3.0 has a "multitap" filter function, similar to the system used by the Contacts application to filter contact names. If you need to easily locate a note in a long list, just press the keys corresponding to the initial letters of the note subject.



3.1 Creating a new note

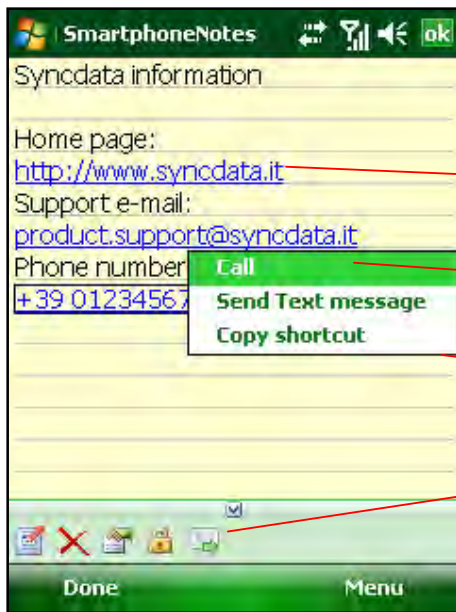
1. Press the left soft-key **New**.
2. Type the note in the text window.
3. Press the left soft key **Done** to save the note. If you don't want to save the note, press the right soft-key **Menu** and select **Cancel edit**.



3.2 Reading a note

1. In the notes list, tap the note you want to read, or select it and press the action key to open the note.
2. Use the navigation pad to browse the note and highlight links to e-mail addresses, phone numbers or Internet URLs. Tap the link, or press the action key to activate the selected link.
 - If the link is an Internet URL, SmartphoneNotes attempts to connect to the Internet and to download the page;
 - If the link is an email address, SmartphoneNotes opens the **Messaging** application: you can compose and send an e-mail message;
 - If the link is a phone number, SmartphoneNotes prompts you to place a phone call to the number. You can also send an SMS to the number: tap and hold the stylus on the link and select **Send Text Message** from the popup context menu.
3. Press the back key to go back to the notes list, or press the right soft-key **Menu** and select **Cancel**.

If the note is password protected, you will be asked to insert the password.



SmartphoneNotes detects Internet URLs, e-mail addresses and phone numbers in your text notes.

Internet URL

E-mail address

Phone number and context menu

Toolbar shortcuts: Edit, Delete, Properties, Protect, Send via E-mail

❶ Phone numbers are not recognized in Windows Mobile Classic devices.

3.3 Editing a note

1. In the notes list, select the note you want to edit.
2. Click the right soft-key **Menu**, then select the **Note** sub-menu and click **Edit**.
3. Edit the note; press the left soft key **Done** to save the note. If you don't want to save the changes, press the right soft-key **Menu** and select **Cancel edit**.

When creating or editing a note, you can change note's properties such as categories, color and memory location: press the right soft-key **Menu** and select **Properties**. See 3.6 for more information on note properties.

3.4 Deleting a note

1. Select the note you want to delete.
2. Click the right soft-key **Menu** and select **Delete**.

❶ If synchronization with Microsoft Outlook® is enabled, the note is deleted from your desktop or notebook computer at first connection.

3.5 Protecting a note

1. Select the note you want to protect.
2. Press the right soft-key **Menu**, select the **Note** sub-menu and select **Protect**. The Protect window appears.
3. Type the password and press the left soft-key **Done** to confirm. Protected notes appear on the

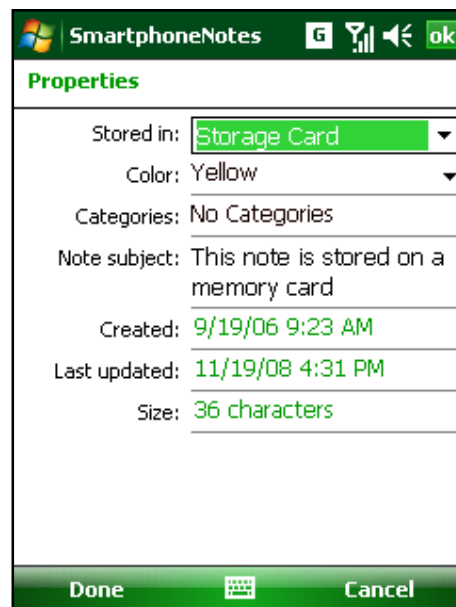
list with a small lock icon on the bottom left corner.

To change the password to a protected note, type the old password, then type the new password in the **New Password** and **Confirm new password** fields. If you want to remove the password protection from a note, just type the old password and leave the **New password** and **Confirm new password** fields empty.

ⓘ **Don't lose passwords used to protect notes! It is not possible to recover a protected note if you don't remember the password.**

3.6 Changing note properties

1. Select the note
2. Click the right soft-key **Menu**, select the **Note** sub-menu, then select **Properties**. The Note Properties window shows the following information:
 - Memory location: can be Phone memory or (if a storage card is available) Storage card. You can change this property to move the note from one memory location to the other. Notes stored on a memory card appear in the list with a “card” icon on the bottom right corner.
 - Color: the note background color. There are five predefined colors: white, yellow, pink, green and blue.
 - Categories: you can assign your notes to different categories, just as you do in Microsoft Outlook. It is also possible to create new categories directly on the phone.
 - Note subject: it's the text that appears in the note list. The note subject is determined automatically when you create a new note. You can change this property, for example, to a shorter subject that fits in the phone display.
 - Creation date and last change date (date of the last change on this note)
 - Number of characters (total number of characters in the note, including spaces, carriage returns and line feeds,, tabs, etc.)
3. Press the left soft-key **Done** to save the changes and return to the previous screen, or press **Cancel** if you made any change and you don't want to save it.



3.7 Sending a note via e-mail or SMS

1. Select the note you want to send
2. Click the right soft-key **Menu** and select the **Note** sub-menu
3. Select menu item **Send via E-mail/SMS**: the **Messaging** application menu appears.
4. Select the message type (SMS/MMS/Text message or e-mail message): a new message is created. It is possible to add more text or edit the existing text.
5. Add the phone number or the e-mail address of your recipient(s).
6. Press the left soft-key **Send** to send the message.

① To send the e-mail or SMS, you must configure your phone in advance. Contact your mobile phone operator for correct setup.

3.8 Creating a task or appointment from a note

1. Select the note
2. Press the right soft-key **Menu** and select the **Note** sub-menu
3. Select menu item **Create task** to create a new task, **Create appointment** to create an appointment.
4. Press the left soft-key **Done** to save the new task or appointment, or **Cancel** to discard.

3.9 Searching notes

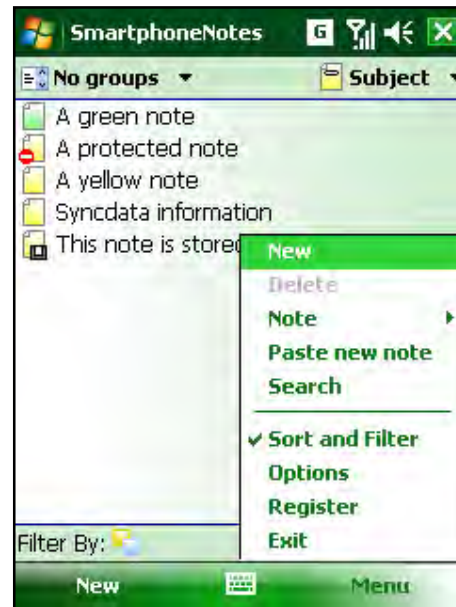
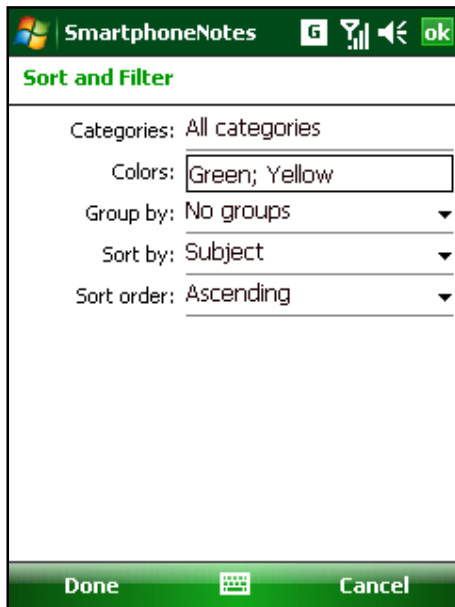
1. Click the right soft-key **Menu**.
2. Select menu item **Search**. The Search window appears.
3. Type the string to search in the **Search for** field, then Click **Done**. Click **Cancel** to discard the operation.
4. A list with the found notes appears. Tap a note in the list to display its content, or select it and press the action key.
5. Click **Done** to close the Search results window.

3.10 Sorting, grouping and filtering notes

1. Click the right soft-key **Menu**.
2. Select menu item **Sort and Filter**. The Sort and Filter window appears.
 - Use the Categories list to select the categories you want to filter, use the Colors list to do the same with notes background color.
 - The Group by list enables grouping of notes according to color, categories, creation or modification date.

- Notes can be sorted by subject, creation date, modification date, color and size, either in ascending or descending order.
3. Press the left soft-key **Done** to confirm the choice, or **Cancel** to discard it.

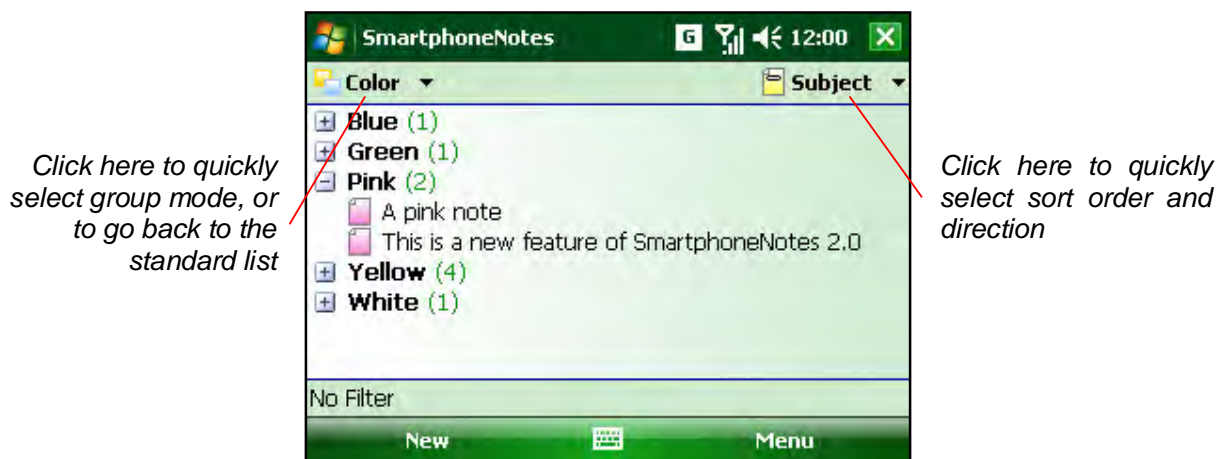
If a filter is active, a check mark icon appears beside the menu item, and a “Filter by” icon appears in the status bar at the bottom of the screen.



Grouping is a powerful new feature that enables you to navigate between notes based on the note color, category or date.

Once you select a grouping mode, notes are arranged in groups. The number beside the group name is the number of notes included in the group. All features available in the standard list are also available in group mode: multitap selection, possibility to sort and filter, etc.

1. Click the “+” icon on the left of a group name to expand the group and see the list of notes belonging to that group. As soon as you expand a group, the previously selected group is collapsed. You can also press the action button to expand or collapse a group.
2. Click the “-“ icon to collapse a previously expanded group.

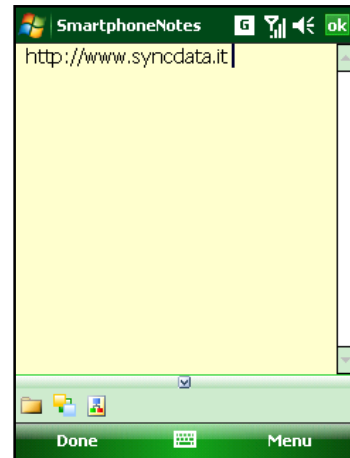
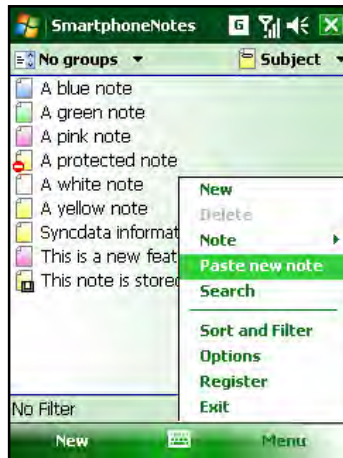
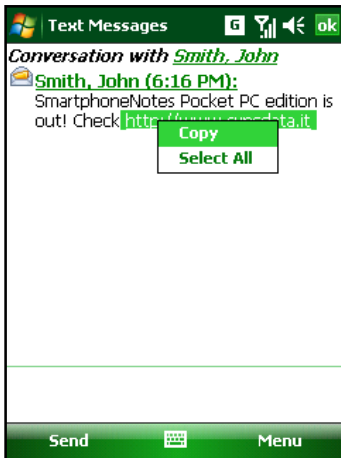


4. Advanced features

4.1 Pasting a note from the clipboard

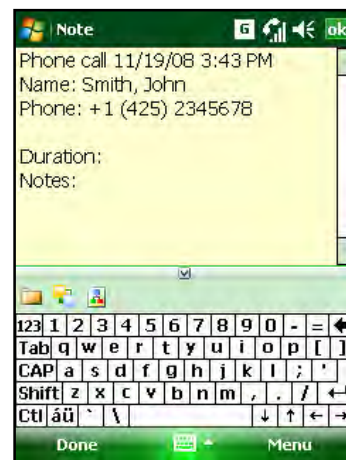
This feature enables you to quickly save as a text note any text information you may have copied into the clipboard.

When the clipboard contains text that can be used as a note, a new menu item **Paste new note** appears in SmartphoneNotes: selecting this command opens a new note window, where you can add more text or just click **Done** to save the new note.



4.2 Taking a note while in a phone call

1. In the call progress screen, click the right soft-key.



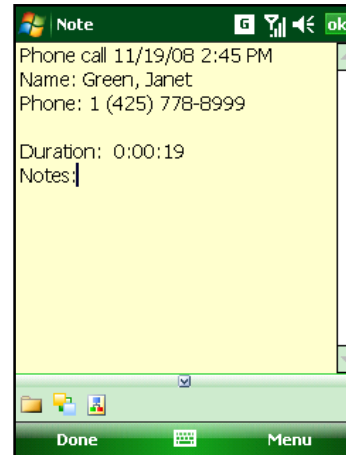
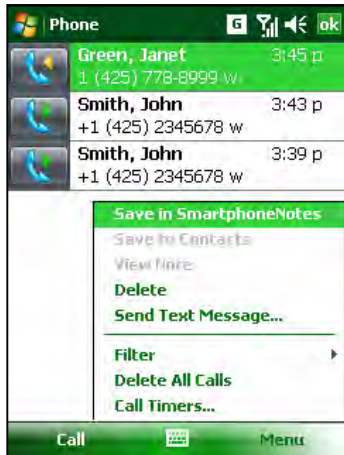
2. Select the new **SmartphoneNotes Note** menu. The **SmartphoneNotes Note** menu extension

is available after installing SmartphoneNotes on your mobile device and enabling the Phone menu extensions (see 5.1 for more information).

3. Complete the note, if required, and click the left soft-key **Done** to save it, or click the right soft-key **Menu** and select **Cancel edit** to discard the note.

4.3 Saving a call from the Call history as a note

1. In the call history screen, click the right soft-key.



2. Select the new **Save in SmartphoneNotes** menu item.
3. Complete the note, if required, and click the left soft-key **Done** to save it, or click the right soft-key **Menu** and select **Cancel edit** to discard the note.

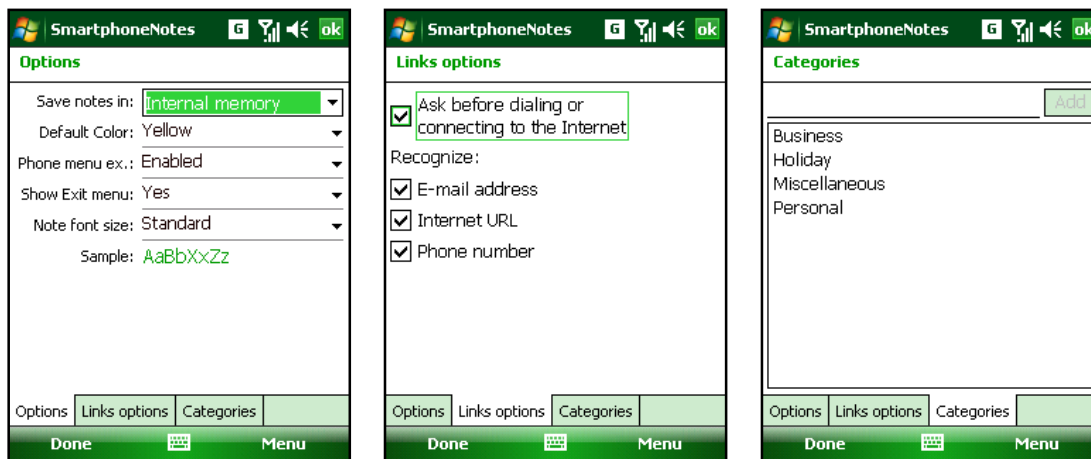
❗ The SmartphoneNotes Phone menu extensions in Call Progress and Call History are not enabled by default. To take advantage of the Phone menu extensions, you should enable them from the Options menu; see 5.1 below for instructions.

❗ Phone menu extensions are available in Windows Mobile Professional devices only.

5. Configuring SmartphoneNotes

5.1 Changing options

1. Press the right soft-key **Menu**.
2. Select menu item **Options**. The Options window appears; you can change the following predefined options:
 - Memory location: select either **Internal memory** or **Storage card** (if a card is available). This option affects the memory location for both new items and items synchronized by ActiveSync.
 - Default color: this is the background color of new notes.
 - Phone menu extensions: enables or disables the new SmartphoneNotes menu commands in Call Progress and Call History.
 - Show Exit menu: using this command, you can enable or disable the Exit menu.
 - Font size: the size of characters used to display notes. There are 6 predefined sizes.
 - Press the left soft key **Done** to confirm the changes, or select the **Cancel** command under the right soft-key **Menu** to discard your changes.



① Phone menu extensions are available in Windows Mobile Professional devices only. If you enable phone menu extensions, a device reboot is required.

5.2 Changing links options

1. Open the Options window (see 5.1).
2. Click the **Links options** tab. The link options screen appears.
3. Check or uncheck the available options: you can enable or disable the prompt before dialing or connecting to the internet; you can enable or disable parsing of the links in notes (e-mail addresses, Internet URLs, phone numbers).

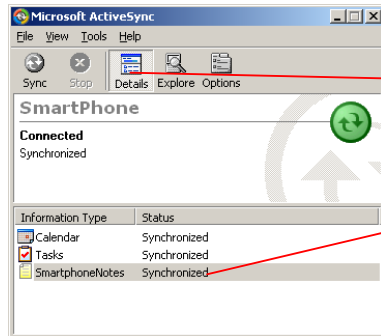
5.3 Managing categories

1. Open the Options window (see 5.1).
2. Click the **Categories** tab. The list of categories appears.
3. To add a new category, type the category name in the top row and click **Add**. To remove a category from the list, select the category, then select **Remove Category** from the right soft key **Menu**.

6. Synchronizing SmartphoneNotes with Microsoft Outlook

Synchronization of text notes with Microsoft Outlook is a key SmartphoneNotes feature. The provided synchronization module enables you to read your Outlook notes with your mobile device while you are away from your desktop or notebook computer. You can edit or delete existing notes, or create a new one: your changes will be reflected in Microsoft Outlook as soon as you synchronize your phone. Microsoft ActiveSync or windows Mobile Devices Center must be installed to enable SmartphoneNotes synchronization.

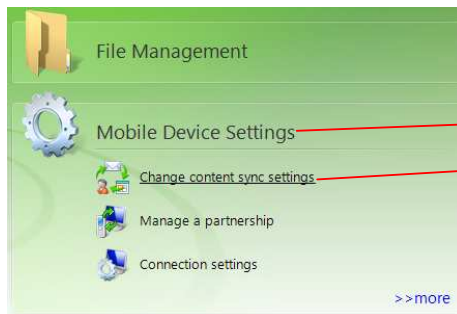
To check if SmartphoneNotes synchronization has been enabled, open ActiveSync or WMDC and look for SmartphoneNotes icon:



ActiveSync:

1. Click here if you don't see the Information type list

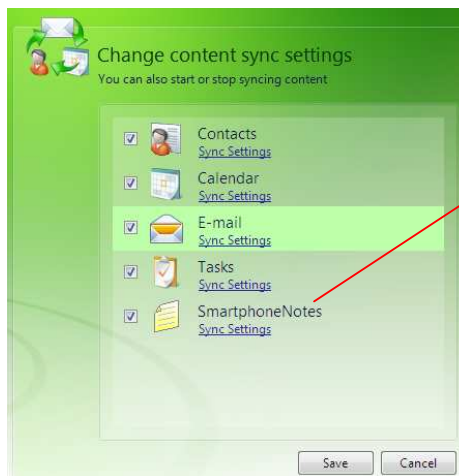
2. Look for the SmartphoneNotes icon



Windows Mobile Devices Center:

1. Select "Mobile Device Settings"

2. Click "Change content sync settings"



3. Look for the SmartphoneNotes icon

The setup program should have done this for you by default. If the SmartphoneNotes icon is missing in ActiveSync, click on the **Options** button (or click on **Tools** menu, then select **Options...**). The Options window appears; browse the list of available options and add a check mark to SmartphoneNotes. Close the Options window: the synchronization will restart to pick the

new synchronized items.

① If the SmartphoneNotes icon cannot be marked in the Options window, SmartphoneNotes has not been installed on the phone, or it has just been installed and ActiveSync has not detected it yet. In this case, disconnect your phone from the desktop or notebook computer, wait 1 minute and reconnect it. Now the SmartphoneNotes option should become available.

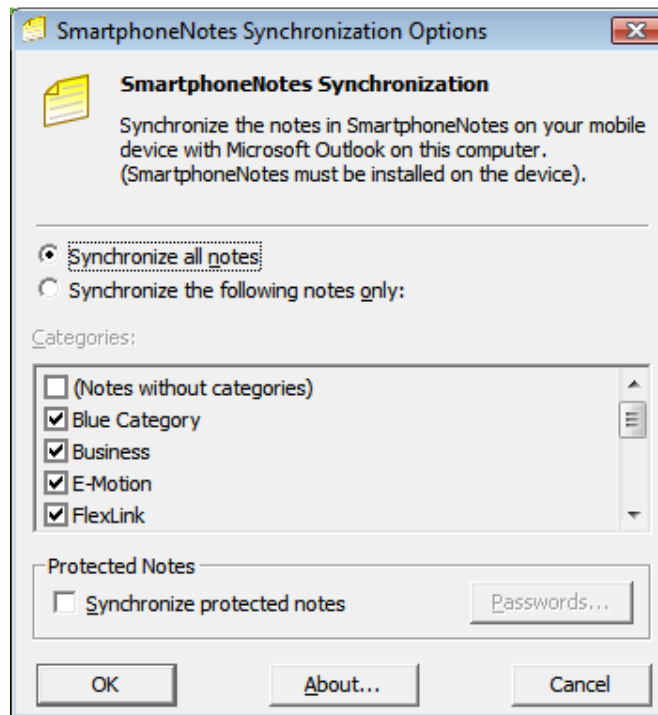
6.1 Synchronizing Microsoft Outlook notes for the first time

If ActiveSync® detects that this is the first time you synchronize notes, you will be asked if you want to combine the notes in the phone with the notes in Microsoft Outlook®, or if you want to replace them.

6.2 Changing synchronization options

To change synchronization options:

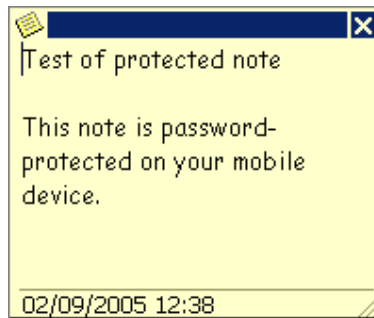
1. Open ActiveSync and click on menu **Tools**, then select **Options...**
2. In the Synchronization options window, select **SmartphoneNotes** and click the **Settings...** button.



You can change the following options:

- Synchronize all notes
- Synchronize notes according to a list of categories (add a check mark to the categories that you want synchronized).
- Synchronize protected notes. If this option is not selected, the text body of notes that are

password protected on your device is not synchronized. If you open on the desktop the synchronized copy of a password protected note, the original text is replaced by a predefined text.



If you want to synchronize protected notes, you must supply the password(s) to the ActiveSync plug-in. To synchronize protected notes:

1. Add a check mark to the **Synchronize protected notes** option
2. Click the **Passwords...** button
3. In the Protected notes passwords window, store the passwords (you can save up to 3 passwords).

ⓘ If you change the default settings and synchronize protected notes, those notes become unprotected in Outlook. Other users may be able to read them.

6.3 Differences between SmartphoneNotes and Microsoft Outlook notes

- In SmartphoneNotes you can assign a different subject to text notes; maximum length for the subject is 259 characters. Microsoft Outlook determines automatically the note subject, or note name; the user cannot change it.
- SmartphoneNotes has a notes protection feature that is not available in Microsoft Outlook.

ⓘ This version of SmartphoneNotes is designed to synchronize text notes in the default Notes folder only. Synchronization of other folders or sub-folders is not supported.

6.4 Synchronization troubleshooting

- If you store the notes in a storage card, and you synchronize your mobile device when the card is not inserted in the slot, ActiveSync deletes all corresponding notes from Microsoft Outlook. To restore the missing notes, just reinsert the Storage card and synchronize again. Alternatively, you can restore the deleted notes from the "Deleted Items" folder.
- Other mobile devices (such as Pocket PCs or Handheld PCs) can create and synchronize voice notes or rich-ink notes in Microsoft Outlook. This type of notes is not supported in SmartphoneNotes and therefore will be ignored during synchronization.

7. Uninstalling SmartphoneNotes

To uninstall SmartphoneNotes (all installation files and the ActiveSync provider) from your desktop or notebook computer:

1. Click the **Start** menu and select **Control Panel**
2. Run the **Add or Remove Programs** application.
3. Browse the list of the currently installed programs and select **SmartphoneNotes (remove only)**.
4. The uninstall program will start and remove SmartphoneNotes from your desktop or notebook computer.

To uninstall the application from your mobile device:

1. Disconnect the device from your desktop or notebook computer.
2. Tap the Windows Mobile **Start** icon on the top left corner of the Today screen and select **Settings**.
3. In the Settings list, click the **System** tab and browse the list of available settings up to the **Remove Programs** application.
4. Click the **Remove Programs** applet to display the list of programs that can be uninstalled and select **Syncdata SmartphoneNotes**.