

# GiftBox™ Quick Start Documentation

## **Introduction:**

GiftBox™ is a gift and gift idea tracking application that runs any Palm OS® handheld, Pocket PC or Windows Mobile handheld, and Windows PC. It can also store personal information for people you exchange gifts with. The Plus version includes PC desktop companion software with additional features. The Lite version runs only on Palm OS® handheld computers, and is intended primarily for Mac users. This document provides information on the handheld software, as the PC software has its own complete help file system. You may want to print this document for easier reference. The handheld screenshots are taken from a Palm OS® handheld, but they look almost identical on the Pocket PC.

## **Installation:**

To install the Plus version on a PC, download the setup file. If this file is in ZIP format, you will need to first unzip the file with an unzip utility. Then, double click the .exe setup file to start the PC installer. The installer will install both PC and handheld software components. Palm OS® users will need to hotsync once the installer is finished to install the handheld files to your handheld.

To install the Lite version, simply download the ZIP file to your PC. Then, unzip the file with an unzip utility such as Winzip ([www.winzip.com](http://www.winzip.com)). Once unzipped, install all \*.prc and \*.pdb files to your handheld using the Install Tool that was installed with your handheld desktop software.

## **Registration:**

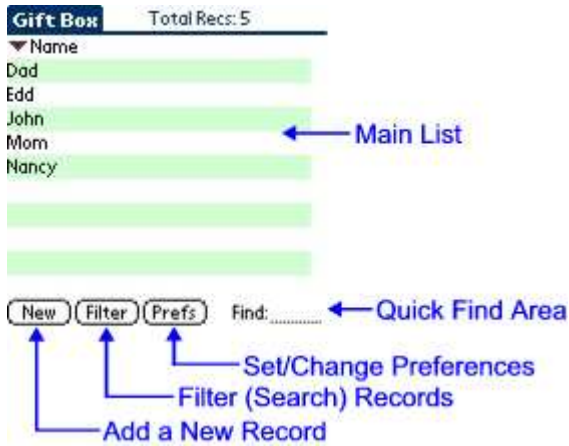
The software is initially installed as a trial version. After purchasing, a 5-digit registration code is provided. This 5-digit code is entered in the blank area on the startup screen on the handheld or on the PC software from the Help menu. Once the registration code is entered the handheld, tap Register. For Palm OS®, on the next hotsync, the registration code will be transferred to the PC. The Plus version, if installed, will detect this code and unlock the full PC version. The registration code unlocks the full version features. No additional installation is required.

## **Getting Started:**

The following screens and descriptions explain many of the features in GiftBox™. The software was designed to be easy and intuitive, so it will be easy to get started. This documentation will help explain some of the advanced features.

To start the software on the handheld, tap the GiftBox™ icon. On Palm OS® handhelds, this icon may be in the Unfiled category. From the Home (icon) screen on your handheld, tap the drop down list in the upper right corner, then select Unfiled to list an uncategorized icons. A category can be assigned to the icon to make it easier to find. Consult your handheld manual for how to categorize icons. On Pocket PC handhelds, tap the Start menu icon in the upper left, then select Programs from the list displayed. The GiftBox icon will be available from that screen of icons.

## GiftBox List Screen:



Upon startup, the list of names is displayed. From this screen, the user may scroll through the list with the onscreen scrollbar or the hardware scroll buttons. The Quick Find Area can be used to jump to a certain record by entering the first few letters in the record title. Simply tap any record in the list to view the record's details.

The buttons at the bottom of this screen will create a new blank record, filter (search) for certain records, or show the Preferences screen.

## Record Details Screens:



The Details screens display the detailed view of any record. Simply enter the text for each field. You can easily move to the next field while entering data using the Enter key or graffiti stroke (/).

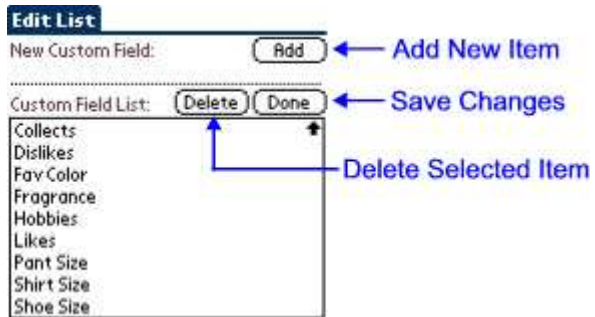
The category, dates, and custom field labels can be changed by tapping the down arrow next to the category or location fields.

View other detail screens, such as gifts given or received, by tapping a Tab in the row of 4 tabs.

Finally, the buttons at the bottom of the details screen will save the record, duplicate the record, or delete the record.



## Editing Categories, Custom Field Labels, and Event Master Lists:

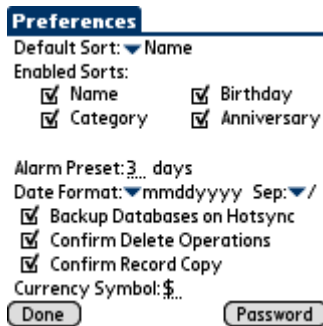


The master list of categories, custom field labels, and events can be edited to include the choices preferred by the user.

To edit the master lists, choose the Edit List... item in the appropriate drop down list.

The screen displayed will list all items in that master list. Icon buttons on this screen will add a new item, delete the selected item, or edit the selected item.

## Setting or Changing the Preferences:



The Preferences screens allow many options to be set by the user. Tap the Prefs button on the main list screen to access the preferences screens.

The default sort can be specified. This is the sort used when the program is started on the handheld.

Sorts can be enabled (checked) or disabled (unchecked). Only enable the sorts that you want in order to save RAM and improve program speed.

The alarm preset can be changed to specify how many days before a birthday or anniversary the alarm should be triggered (Palm OS only).

The date format and date separator can be selected in order to view dates in a preferred format.

Additional options allow the backup of databases on a hotsync to be enabled or disabled. The confirmation messages when deleting or copy a record can also be enabled or disabled.

The default currency symbol can be specified. Enter the desired currency symbol into the text area.

## Filtering (Searching) Records:



Records can be filtered (searched) by tapping the Filter button on the main list screen. This will display the Filter screen.

Enter the desired search criteria, and tap the Do Filter button to filter on the criteria. A list of records matching the filter will be displayed.

Also, the Filter button on the main list screen will change to an All button. Tap the All button to clear the filter and view all records.

## Menu Options:

A menu system is available to perform additional functions on the handheld. To view the menu system, tap the Menu silkscreen icon (just below the Home silkscreen icon). Also, on many handhelds, the title bar for the application can be tapped while the application is running to display the menu system.

### View Menu:

The View menu offers the following options:

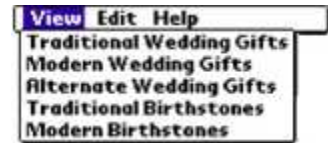
**Traditional Wedding Gifts** - selecting this option will display a list of traditional wedding gifts.

**Modern Wedding Gifts** - selecting this option will display a list of modern wedding gifts.

**Alternate Wedding Gifts** - selecting this option will display a list of alternate wedding gifts.

**Traditional Birthstones** - selecting this option will display a list of traditional birthstones.

**Modern Birthstones** - selecting this option will display a list of modern birthstones.



### Edit Menu:

The Edit menu offers the following options:

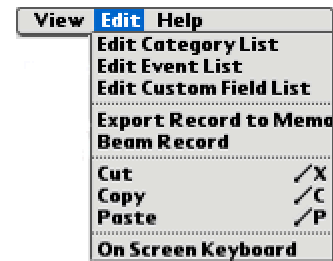
**Edit Category/Event/Custom Field List** – these menu items allow the master lists of categories, events, or custom fields to be edited and customized.

**Export Record to Memo/Note** – while viewing any record, select this option to export the record as text to a new memo (Palm OS®) or note (Pocket PC).

**Beam Record** – (Palm OS® only) - while viewing any record, select this option to beam the current loan to another GiftBox™ user. When the receiving user starts GiftBox™ on their handheld again, the new record will be imported with no additional work. Note that the receiving user must import each record before receiving another record.

**Cut/Copy/Paste** – (Palm OS® only) - standard functions using graffiti.

**On Screen Keyboard** – (Palm OS® only) - this menu option will display the on screen keyboard for entering text or numbers. This is useful for handhelds that do not have a virtual graffiti area.



### Help Menu:

The Help menu offers the following options:

**Help** – selecting this option will display the help file available on the handheld.

**About** – selecting this option will display the About screen, including the version number.

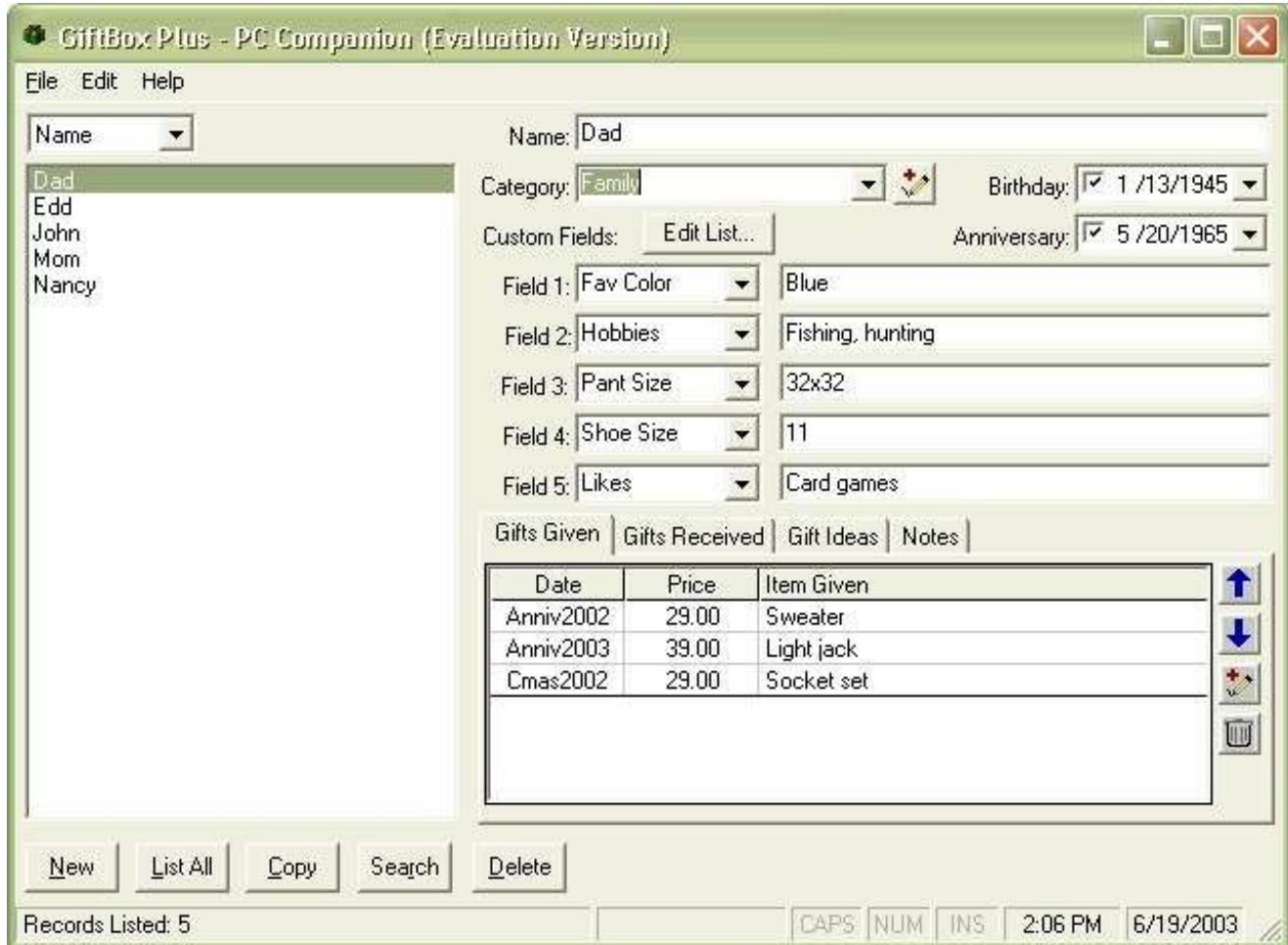
**Register** – (Pocket PC only) - selecting this option will display the Registration screen for entering the registration code.

**Close** – (Pocket PC only) - selecting this option will shutdown the application on the Pocket PC, rather than hide it.



## GiftBox Desktop:

The Plus version includes PC desktop software to manage information from the PC. The PC software includes all of the features on the handheld software, plus other features specific to the desktop software. Features available only on the desktop software include printing selected records, printing all records, importing records from delimited text files (CSV, etc.), exporting records to a CSV file, and more. Consult the help file on the PC desktop software for further information on the desktop features.



## Conclusion:

If you are just evaluating or have already purchased GiftBox™ – Thanks!

If you have questions about the software, or cannot find an answer to a problem at our site, please email our support staff. We will work hard to resolve your issue and answer your questions.

