

# InfoSafe Plus Quick Start Documentation

## **Introduction:**

InfoSafe Plus allows easy information management of usernames, passwords, account numbers, private information, PINs, and ANY other information from any Windows PC, and it includes a data viewer for Blackberry devices. 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.

## **Installation:**

To install the software, download the setup file (usually InfoSafeBB\_Setup.exe) to your PC. Then, double click the .exe setup file to start the PC installer. The installer will install the PC software first. When the software is first run after installing, instructions for installing the Blackberry components will be displayed, as an automated install is not possible to the Blackberry. Use these steps to configure the Blackberry components:

To install the device software:

1. Connect your BlackBerry to your desktop PC
2. Launch the BlackBerry Desktop Manager software on the PC
3. BACKUP your device with the Backup / Restore feature
4. Double-click the Application Loader icon
5. Click Next in the Application Loader Wizard
6. Click the Add button and browse to select / open this file:  
C:\Program Files\InfoSafe\infosafe.alx (or equivalent location)
7. Click Next and the software will be installed on the device

To setup synchronization for the Blackberry:

1. Start the Blackberry Desktop Manager
2. Double-click the Synchronization icon
3. Make sure the 'Execute Add-in actions' box is checked
4. Click the Configuration tab
5. Click the Configure Add-ins button
6. Make sure the WakefieldSoft InfoSafe item is checked

Once synchronization is enabled, the custom add-in will run each time the Blackberry is connected (if enabled). The add-in will check the PC database for any additions, deletions, or updates. If any changes are found, the add-in will transfer all data from the PC to the Blackberry device. If no changes are found, the add-in will quickly exit and not transfer data. This keeps your synchronization time to a minimum. A synclog.txt file is created in the data folder each time the add-in runs. This file contains synchronization progress and status information should it be needed.

## **Registration:**

The software is initially installed as a trial version. After purchasing, a 5-digit registration code is provided. This 5-digit code, along with your device PIN, is entered on the PC software from the Help / Register menu. 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 InfoSafe. The software was designed to be easy and intuitive, so it will be easy to get started. This documentation will help explain many of the features.

To start the software on the handheld, select the InfoSafe icon from the Blackberry device main icon screen.

## Main List Screen:



Upon startup, a password prompt will be displayed. Enter the same password you set on the PC version. After verifying the password, the list of records is displayed. From this screen, the user may scroll through the list and select any record to be viewed.

The Find function at the top of the screen will locate the record with a name starting with any text entered. For example, enter 'con' in the Find field, and then select the Find button. The first record starting with 'con' will be found and selected.



The menu allows other menu choices to be selected:

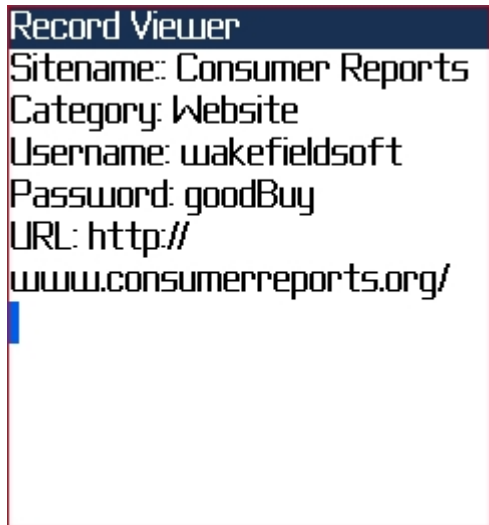
*View Record* displays the highlighted item in the Record Viewer screen

*Find* returns to the Find field at the top of the screen and sets the focus for text entry

*About* shows version information

*Close* closes the program

## Record Viewer Screen:



After selecting to view a record from the main list screen, the selected item will be displayed.

Scroll the screen to see all of a record's details.

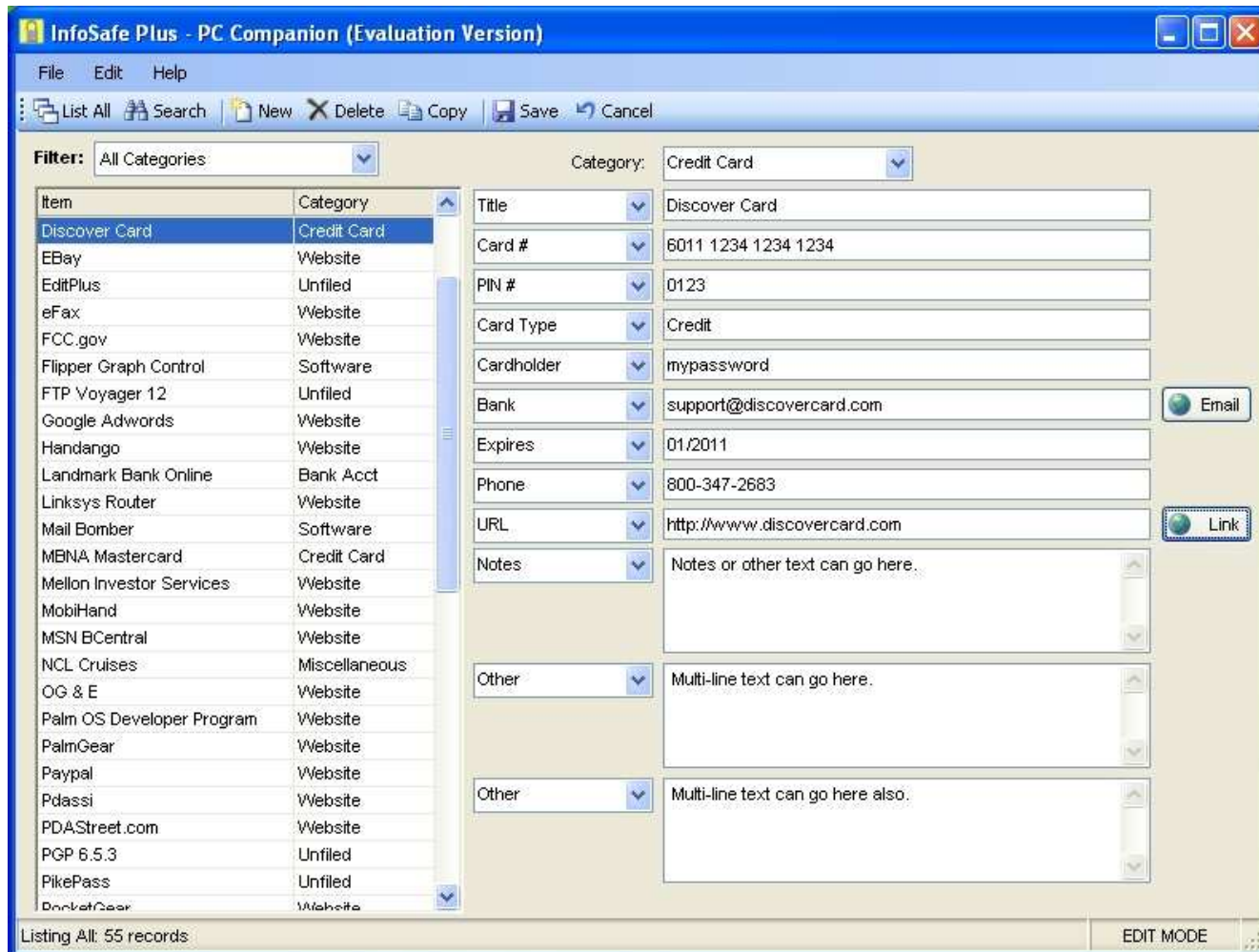


To view the program About screen, select the *About* menu item from the main record list screen. A screen listing program information will be displayed, including program name, version number, copyright information, and support or contact information.

This screen will also display the Device PIN which is needed when purchasing. Your registration (unlock) code is based on the Device PIN.

## InfoSafe 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 InfoSafe   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.

