

# InfoSafe™ Quick Start Documentation

## Introduction:

InfoSafe™ allows easy information management of usernames, passwords, account numbers, private information, PINs, and ANY other information collection from any Windows Mobile handheld or phone and Windows PC. 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 InfoSafeWM\_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, the handheld software will be installed.

## 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 / Register menu. Once the registration code is entered on either the handheld or PC, the registration code will be transferred to the other version when synced. 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 some of the advanced features.

To start the software on the handheld, go to the Start menu. If InfoSafe is not there, go to Programs. Tap or select the InfoSafe icon to launch the program. Note that this document may specify a tap, which only applies to touchscreen devices. Smartphone users can navigate and select with the hardware buttons.

## Main List Screen:



Upon startup, the list of records is displayed. From this screen, the user may scroll through the list. Select View to view the selected records details

The Actions... menu allows other options to be selected:

*Search Records* – searches for specific text

*List All Records* – clears any search results listed

*Add New Record* – adds a new entry

*Edit Master Lists* – edits the list of categories or fields

*Set/Change Password* – sets or changes the password

*About InfoSafe* – shows version and other program info

*Exit InfoSafe* – closes InfoSafe completely

## Record Viewer Screen:

InfoSafe abc Y x

Category: Credit Card  
Title: Discover Card  
Card #: 6011 1234 5678 0123  
PIN #: 0123  
Card Type: Credit  
Password: mypassword  
Expires: 12-2012  
Phone: 800-347-2683

Export Record to File  
Copy Record  
Delete Record  
Edit Record

Back | Actions...

The viewer screen shows an individual record. Scroll the screen to see all of the record's details.

The Actions... menu allows other choices to be selected:

*Export Record to File* – exports a record to a text file – NOT encrypted

*Copy Record* – makes a copy of a record

*Delete Record* – removes the record from the database

*Edit Record* – opens the record for editing

## Record Edit Screen:

InfoSafe abc Y x

Credit Card  
Title  
Discover Card  
Card #  
6011 1234 5678 0123

Generate Password  
Paste Password  
Cancel Edit

Save | Actions...

The edit screen displays the record for editing. Simply enter the text for each field.

When a new category is selected, the field names will be changed to the default field names for the selected category. The list of categories can be edited and customized.

Any field name on an individual record can be changed by selecting another field label. The list of fields can be edited and customized. This allows individual records to be setup precisely for a particular item.

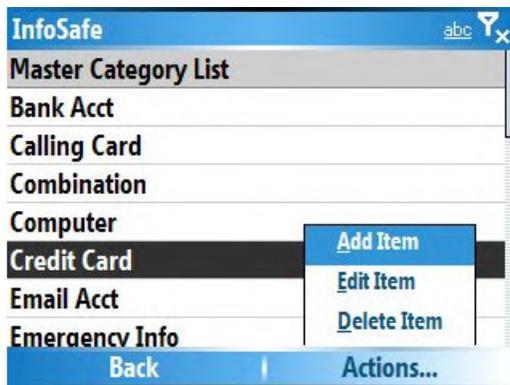
The Actions... menu allows other choices to be selected:

*Generate Password* – generates a random password

*Paste Password* – pastes the generated password into the current field

*Cancel Edit* – cancels the edit and reverts to the original record values

## Editing Categories:



The master list of categories can be editing to include the category names preferred by each user.

To edit the categories list, choose the Edit Master Lists... Categories from the main list screen's menu.

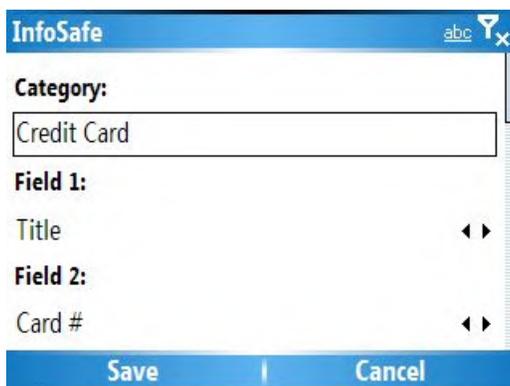
The first screen displayed will list all categories.

The Actions... menu allows other choices to be selected:

*Add Item* – creates a new category and field labels

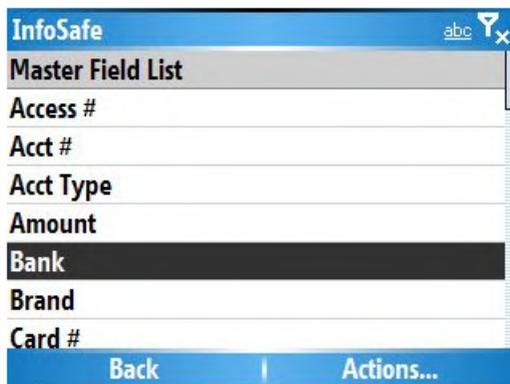
*Edit Item* – opens the selected category for editing

*Delete Item* – removes the selected category from the master list



If Edit Item is selected, the Edit Category screen will be displayed. From this screen, the category name can be entered or edited. In addition, the preferred field names can be chosen for that category. This allows the user to setup the field names exactly as they would like them for the categories. However, the field names can be changed for individual records on the edit screen for a record. This allows for even greater flexibility.

## Editing Field Names:



The master list of field labels can be editing to include the field names preferred by each user.

To edit the field names list, choose the Edit Master Lists... Fields from the main list screen's menu.

It works just like the category screens described above.

## Setting or Changing the Password:



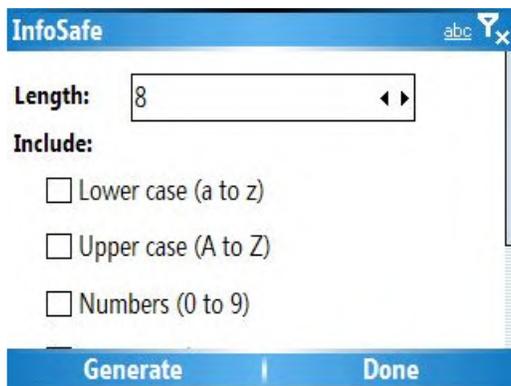
The screenshot shows a dialog box titled "InfoSafe" with a blue header bar containing "abc" and a close button. The dialog has three text input fields: "Password:", "New Password:", and "Retype Password:". At the bottom, there is a blue bar with "OK" and "Cancel" buttons.

For maximum security, a password is recommended. To set or change the password, select the Actions... Set/Change Password menu item on the main list screen.

Enter the old password if one exists, then enter the new password and retyped password.

Since the password is used to encrypt each record, and the actual password is not stored on the handheld, your password cannot be recovered if lost or forgotten. Please be sure you know your password or record it in a safe location. Also, when changing the password, each record must be decrypted with the old password, and re-encrypted with the new password. For this reason, it may take a minute or two to process this when changing the password. We recommend that a password be setup before many records have been entered, which will avoid this processing time later on.

## Password Generator:



The screenshot shows a dialog box titled "InfoSafe" with a blue header bar containing "abc" and a close button. The dialog has a "Length:" label next to a numeric input field containing "8". Below that is an "Include:" label followed by three checkboxes: "Lower case (a to z)", "Upper case (A to Z)", and "Numbers (0 to 9)". At the bottom, there is a blue bar with "Generate" and "Done" buttons.

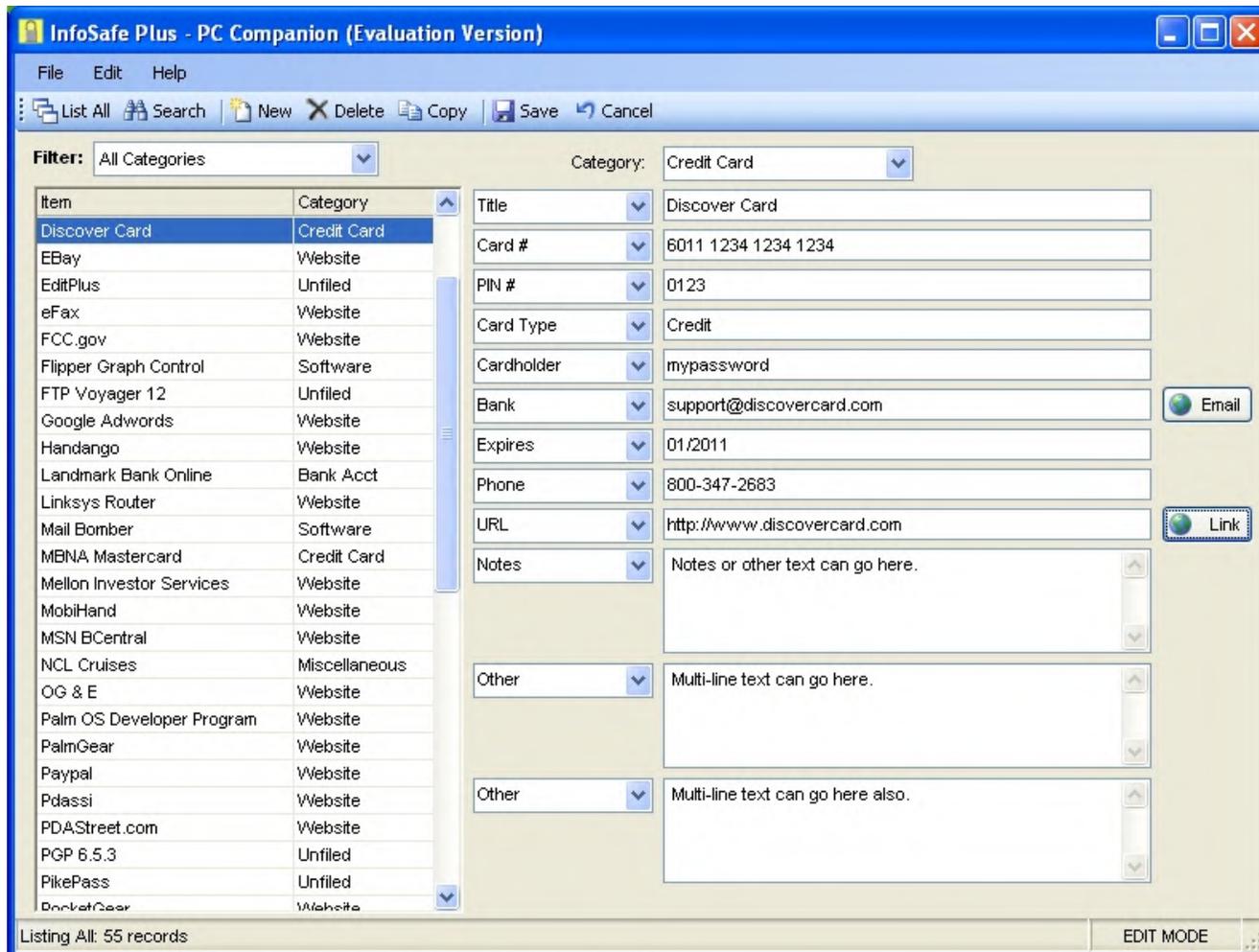
InfoSafe also includes a random password generator to generate random passwords of a user-specified length. The type of characters included in the randomly generated password can also be selected.

After the password is generated, it can be pasted into the focused field if a record was being edited. Also, the generated password will be placed on the clipboard for easy pasting to another field or in another application.

To generate a random password, select the Actions... Generate Password menu item when editing a record.

## 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.

