LightArrow Apps User Guide, Version 8.0

LightArrow Inc.

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LifeTopix | My.Agenda | Pro.Inbox | Pro.Notes | My.Notes | My.Shopping | Pro.Lockers | My.Self

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Getting Started

The following topics describe how to get started with your LightArrow app.

Overview

This help is a superset of all help materials for all LightArrow apps based on the LightArrow App Engine 8. Online Help that applies to LifeTopix also applies to My.Agenda; however, some help may not be applicable depending on the topics and packages that you've purchased via the in-app purchases. Some apps are a subset of the full functionality, such as our shopping and note-taking apps.

Touchpoints

Touchpoints link topics, and they are the keys to the power of your LightArrow app. A touchpoint allows you to define information within one topic and then leverage that information in other topics. This gives you the ability to relate information in the manner that is most natural for you. For example, if you are in Travel + Places defining a trip you plan to take, the tasks you specify for that trip are automatically accessible via Tasks + Projects. Or, if you define a new service provider in People + Services for a party you are hosting, that provider is also accessible from Events + Appointments. Touchpoints provide a logical way to think about information, and they enable you to avoid duplication of data by eliminating the need to re-enter information in multiple places.

My Topics View

In LifeTopix or My.Agenda, the My Topics view is the portal into the 12 topics that the apps provide. Smaller apps may only represent one of the topics, such as Notes or Shopping -- plus additional common functionality. The topics are described below.

- Tasks + Projects
- Shopping + Gifts
- Events + Appointments
- Travel + Places
- People + Services
- Health + Goals
- Finances

- Home + Assets
- Education
- Notes + Files, Lists
- Media
- Bookmarks + Lockers

Quick menu

There are buttons available at the bottom left navigation pane of the Dashboard by tapping the Quick Menu. Refer to Quick Menu for more information.

Dashboard buttons

These buttons are available on the left side of the Dashboard:

	Home/Agenda: your Home view may vary depending on the app you've purchased. Generally, it allows you to view an overview or outline of the things that you need to accomplish today, tomorrow and the next seven days, including checklists and to-dos (OR) provides a view for creating notes, shopping, bookmarks/lockers, etc. -- depending upon your app.
	Hot List: to easily add your favorite and most commonly used views and items for quick access
	My Topics: to access the 12 life topics
	My Calendar: to access the calendar views
	Recent: to show the most recently updated items for the last 1 - 60 days
	My Inboxes: for ubiquitous capture of everything (including email and social media messages) -- enabling you to quickly capture items and convert them to actionable items
	My Contexts: to organize items by defining contexts such as physical location, resource, or the equipment that's necessary to complete a task
	Near Me: to acquire location and use foursquare® to search for businesses, events, etc.
	My Apps: to launch your favorite apps from a central location

	Engage: to discover new features; learn about known issues; read online news and hints; tell your friends about your app; and contact support
	Settings: to customize your app to match your needs and to access Cloud Sync
	Search: to search for topic items

Additional Features

- Device-to-device automatic sync via Dropbox™, Box™, iCloud™ (Beta - technology preview), OneDrive™ (Beta - technology preview), and Google Drive (Beta - technology preview)
- Integration with Toodledo®, Evernote®, Asana™, foursquare®, and Google Drive/Tasks
- Unified Agenda View
- User-customizable dashboard
- Social media dashboard
- Geographical location awareness for relevant items
- Email sharing and social media support
- Out-of-the-box hierarchical categories and sample data
- Support for user-defined categories
- iOS 7 optimized
- Retina display optimized
- Integrated backup and restore utility
- Tappable inline phone, email, and web links
- Productivity optimizations (Quick Inbox, Quick Add, Quick View, Checklists, and built-in search)
- Context-sensitive help

Getting Started

Welcome to your new LightArrow app! We're very excited that you've decided to start taking control of your personal and work productivity so you can become the happy and efficient person you were always meant to be!

There are several apps in the LightArrow app family, with LifeTopix being the flagship app. They're based on the LightArrow App Engine, and the features that you receive are based on the app you've chosen and your in-app purchases. To get a big picture view and compare the features of LightArrow apps, you can visit our Compare Apps page.

The default Home views of your LightArrow apps differ, and can be customized by you. For example, the Home view for LifeTopix and My.Agenda are the agenda views; however, if you've purchased My.Shopping, the Home view will be the equivalent of the Shopping + Gifts topic of LifeTopix.

Keep in mind; you don't need to set up everything in your LightArrow app before you start using it. You can use it to simply create to-do lists and calendar items (or) you can start big and set up projects, large events, shopping trips, etc. We recommend you start small and learn as you go. But, it's completely up to you.

GRANT ACCESS TO CONTACTS, LOCATION, ETC

When you first launch your LightArrow app, it will ask you if you want to grant access to items on your device, such as contacts, calendar, location, etc. We highly encourage you to grant access to take full advantage of the app. Don't worry, we never view or access your data in any way. Everything is stored on your device and you are the only one who has control over items and data that are created.

WHAT DO THE ICONS IN THE LEFT PANEL OF THE DASHBOARD DO?

You'll notice on the left side of any of the main views (left navigation pane from the dashboard view) that a panel of icons displays. The options that are available vary depending on your app. You can adjust the size of this panel with the control that appears as three vertical lines next to the title of the view.

- **Home**: Access the Agenda or Main view.
- **Hot List**: Add your favorite items or views for quick access.
- **My Topics**: Your window into the 12 life topics.
- **My Calendar**: View your calendar.

- **My Inboxes**: Capture anything and everything for conversion into app items (including email and social media).
- **My Contexts**: Tag your items to help you organize and find them.
- **Near Me**: Find businesses and items in your local area.
- **My Apps**: Launch your favorite 3rd party apps.
- **Engage**: Learn more and get support.
- **Settings**: Customize your app, set up sync, secure your data, make in-app purchases, and manage categories.
- **Search**: Find items in your app.

If you wish to know more about the views that they access, refer to Overview help.

WHAT ARE THE 12 LIFE TOPICS?

If you've purchased one of the full-featured apps, LifeTopix, My.Agenda or Pro.Inbox, you'll receive the view into the 12 Life Topics (depending on in-app purchases), which allows you to manage just about anything in your life or business. The 12 topics are connected, which allows reuse throughout the app. For example, if you're planning a wedding, you can choose invitees from your contacts in People + Services. If there are topics you wish to hide, tap the filter icon at the top of the 12 topics view.

Refer to Overview help to learn more.

HOW DOES THE APP WORK WITH GOOGLE, YAHOO, AND OTHER CALENDARS?

Your LightArrow app works directly with the iOS Calendar app to access your calendars. It supports the same calendars that your iOS calendar supports, including:

- iCloud
- Exchange
- Google
- Yahoo
- Aol
- Outlook.com

If you've included your Google or other calendars in the iOS Calendar app, then your LightArrow app will be able to access these calendars, and will display the

events. The iOS Calendar app automatically syncs with your Google calendar and since your LightArrow app retrieves the calendar items from the iOS Calendar app, the items in your LightArrow app reflect the latest device calendar items since the last iOS Calendar app sync.

To add your Google calendar (or other calendar) to your iOS Calendar app:

1. Open the iOS Settings app and tap on "Mail, Contacts, Calendars."
2. If you haven't already done so, tap "Add Account," then tap the calendar you wish to use, and enter your credentials.
3. Now your Google calendar will be included in your iOS device Calendar app.

To include the Google calendar in your LightArrow app, make sure your iOS device has granted your LightArrow app access to your calendars:

1. Open the iOS Settings app.
2. Tap "Privacy" and tap on "Calendars."
3. Make sure the slider is set to ON for your LightArrow app. (This only has to be done once.)

After you complete the procedures above, open your LightArrow app and tap **My Calendar** located on the left navigation pane from the dashboard view. Tap the Filter icon located at the top right of the screen. This opens the Filter Setting view. Under the "Include iOS Calendars" section, ensure you see your external calendar and also ensure that it has been checked for inclusion.

Now you will see your Google calendar items in your LightArrow app. When you create certain items in your app, a corresponding linked event can optionally be created on your iOS Calendar, as well. If you want your Google or other calendar to be the default calendar for this, you can go to **Settings** -> **My Settings** in your LightArrow app and scroll to the bottom of the screen to the "Default iOS Calendar." Here, select the calendar you wish to be the default, and then tap **Done** at the top right of the screen.

HOW DOES THE APP WORK WITH MY DEVICE?

Your LightArrow app works seamlessly with your iOS Calendar, iOS Contacts, iOS Reminders and iOS Local Notifications.

Calendar Items

You'll notice as soon as you grant access to your iOS calendar (the calendar that comes with your iPhone or iPad), you'll see your events from that calendar reflected within your LightArrow app. The Home view (Agenda) shows you all of

your events for today, tomorrow and the next seven days. The My Calendar view shows you multiple views of your calendar, including Month, Day, Week, and Year views.

In your app, you can create LightArrow app calendar items and iOS calendar items. LightArrow apps work with the calendars that the iOS calendar supports. When you create a LightArrow app item that is associated with a date, such as a task, project, education assignment, or event; an entry for that item is added to your device's default Calendar. For example, if you create a trip that starts on March 3rd and ends on March 6th, the LightArrow app adds an entry for this trip to the Calendar on March 3rd with a duration of three days. Date-related changes made to the LightArrow app items are reflected automatically in your device's Calendar. This way, you can take advantage of all the calendars that the iOS calendar supports as well as the audible and visible alarms.

To remind you of the source of any entry that your LightArrow app adds to your Calendar, the title of these entries look like this: [*Title: name of the LightArrow app*]. For entries that the LightArrow app adds to your Calendar, a reminder alarm is set according to the LightArrow app settings. This means that you can control if and when an alarm is generated in advance of the date and time of a the LightArrow app item. Refer to My Settings help for more information.

Note: Your device's default calendar is specified in your device's Settings via **Settings** -> **Mail, Contacts, Calendars** -> **Default Calendar**.

Refer to My Calendar help to learn more.

Reminders

In your app, you can create iOS reminders and LightArrow App reminders. LightArrow App reminders show on your iOS calendar and on your LightArrow App calendar/agenda. iOS reminders can be managed with your iOS calendar app. Typical notifications for your device will take place for reminders.

Beware that your device may have two different time zone configuration settings -- one for the device itself, and a second one for Mail, Contacts, and Calendar. Reminders created in your device's Calendar by the LightArrow app will adhere to the time zone settings you have configured in your device for Mail, Contacts, and Calendar.

Refer to Reminders help to learn more.

Contacts

In your app, you can import iOS contacts directly from your Contacts app and seamlessly work with them.

Refer to People + Services help to learn more.

Location Services

The Near Me view gives you one-tap access to a view of your LightArrow app items that are in the vicinity of your current location. Providing access to your location allows you to take advantage of locations of assets, appointments, audio, contacts, events, notes, photos, shopping items, service providers, tasks, trips, or video. This allows you to view these items on the map in the Near Me view, which helps you plan your day — especially if you're running errands or visiting clients. In addition, the Near Me view is powered by foursquare®, which allows you to search for arts & entertainment, events, food, shops, and other types of businesses near you. If these businesses are businesses that you frequently use, you can convert them to Places, Sellers, Banks, or Service Providers in your LightArrow app directly from the Near Me view.

Refer to Near Me help to learn more.

FILTERS

Notice in your Home view (and other views) that there is a filter icon in the upper right. It's important to remember that this allows you to hide and view many items; such as closed items; items from your calendars (including iOS, Google, Yahoo, etc.); and items such as projects, expenses, shopping items, etc.

REORDERING ITEMS IN YOUR APP

In many places of your app, you will notice an icon with three horizontal lines. These icons allow you to reorder items such as the icons in the left panel of the main views and also checklist items. Simply tap the icon with three lines, you will see additional icons with three lines appear. When the icons appear, you drag them up or down to reorder the items.

HOW DO I PROTECT MY DATA? – USE BACKUPS

As a supplement to the sync capability of iTunes, the LightArrow app provides a backup and restore utility to help you further safeguard your the LightArrow app data. You can choose to perform a backup at any time, such as every day, every week, or every time that you enter new data. It is always a good idea to make frequent backups of your the LightArrow app data.

Refer to Backup, Restore, & Sync help to learn more.

HOW DO I KEEP MY DATA PRIVATE? – SET A PASSCODE AND PIN

You can secure the LightArrow app with a passcode to prevent unauthorized access. You can also set a PIN so that information in the LightArrow app such as financial account numbers will not be displayed until you enter the PIN.

Refer to Secure Your Data help to learn more.

WHAT SHOULD I SET UP FIRST?

You can get started using your app immediately and configure items as you go; however, there are a few items that you may want to set up right away.

Settings -> Manage Categories

Some topics naturally lend themselves to hierarchical categories. For example, when you think about a project you want to schedule or a task you want to remember, you might think of them in the context of categories, such as work, family, outdoor activities, or health. Or, if you consider services you receive, they tend to fall into the categories that define how you use them, such as education, finances, or travel. But some topics are better associated with objects or dates instead of categories. For example, if you track all your bill payments, you probably organize those by account and date. Or, if you are logging nutritional intake, you might organize those by food or drink item.

Pre-defined hierarchical categories are available in the main view of the topics for which categories make sense. These include Tasks + Projects, People + Services, Home + Assets, Education, Notes + Files, Lists, and Bookmarks + Lockers. These preset categories serve as hyperlinks -- when you select a category and then tap the add icon, the category is automatically set in the definition of the new object. Of course, you can change a category assignment at any time. Categories are customizable, which means that you can add, modify, delete and hide them. Hiding a category will cause it not to appear in any view unless you have defined at least one object to have that category. You can manage the categories for a topic directly from that topic's main view, or you can manage the categories for all topics in Manage Categories.

Refer to Manage Categories help to learn more.

My Topics -> Finances -> All Accounts

When you track bill payments in the LightArrow app, you can include everything about those payments, including accounts from which they are paid. Because you probably pay multiple bills from each account, you should create bill-paying accounts in the LightArrow app before defining any bills or services.

Refer to Finances help to learn more.

My Topics -> Shopping + Gifts -> Products [OR] Home view of My.Shopping -> Products

[AND]

My Topics -> Shopping + Gifts -> Sellers [OR] Home view of My.Shopping -> Sellers

To add items to a shopping list without distracting sidesteps, you should configure the sellers you use most and the products you typically buy. The LightArrow app provides preset sellers and products, which should help you quickly and easily configure the ones you need. You can remove or customize preset sellers and products as needed.

Note: All service providers that you define with a category of Seller will automatically be available from any list of Sellers in shopping lists, asset details, etc.

Refer to Shopping + Gifts help to learn more.

My Topics -> Health + Activity [OR] Home view of My.Self

The LightArrow app provides robust logging that enables you to track personal metrics and information, including your goals, physical activities, nutritional intake, medication and vitamin intake, health statistics, and wellness status. Preset categories are provided for you, but you should tailor these logs to your needs. Delete logs that you won't track, and create logs for things you will track, but that don't already exist. That way, you can track exactly what you care about most efficiently.

Refer to Health + Goals help to learn more.

My Contexts

Context tags help you to organize and locate information. They're optional, but can be helpful, especially if you're a follower of the GTD® method.

Refer to My Contexts help to learn more.

Settings -> My Settings

You can customize your LightArrow app in many ways including colors, note and checklist item positioning, default views, the timing of reminders, and more.

Refer to My Settings help to learn more.

My Inboxes [OR] Home view of Pro.Inbox

Whether you're a businessperson, parent, or student, you're overloaded with information from many sources — including email, social media, and the web. Most likely, you're hopping between Twitter, Email, Facebook, and the web to keep up with all of this information. Use this view as a single source to set up your Twitter, Facebook, Email and Web rules to filter the information you want to see and convert the information to LightArrow app items, such as tasks,

appointments, products, events, etc. You can also capture anything else you wish to track and assign or schedule those items later as LightArrow app items.

Refer to My.Inboxes help to learn more.

Device-to-device Sync

If you're using more than one Apple device, such as an iPad, iPhone and iPod touch, you can sync your data from device-to-device by using popular cloud services. You don't need to set up sync on day one, but keep in mind that when you set it up, you will need to have your data on one master device that will be copied over to the secondary and tertiary devices. Once they're all synced, it doesn't matter which device you're using – the data is synced back and forth.

You can use your Dropbox or Box account to sync the LightArrow app data across your devices automatically. Because iCloud is a new and evolving technology, iCloud sync is a "Beta - technology preview" in this release of your LightArrow app.

Refer to Sync help to learn more.

HOW DO I START CREATING ITEMS?

Most people start directly from the large plus sign in the Home view to start creating items right away. In any of the apps, the large plus sign gets you started.

RESOURCES

We provide many resources for you via our Engage view. You will find news about our latest features; know what's coming up from our roadmap that's regularly updated; blog posts about your apps; general productivity tips; and known issues. You can also contact us directly from this view. We encourage you to contact us at any time. We respond to every submission.

Refer to Engage help to learn more.

Settings

WHAT CAN I DO HERE?

In the Setting view, you can customize your LightArrow app to optimize the way you manage the information in your life. You can perform the following from the Settings view:

- **My Settings**: In this view, you can set colors; enable AirAccess; set maximum occurrences for repeat schedules; position new note items; position new checklist items; set your default search URL; set your Default Dashboard view; enable or disable deletion of quick inbox items after conversion; set whether or not items that are due later in the same day are overdue; set your default iOS calendar, and set the specifications for iOS calendar reminders.
- **Backup, Restore & Sync**: In this view, you can backup all your LightArrow data to an online file service and overwrite all your LightArrow data with the data from a previous full online backup. You can also set up sync for syncing data across iOS devices.
- **Secure Your Data**: In this view, you can set up a passcode lock to secure your data.
- **Manage Categories**: In this view, you can create, edit, hide, or delete categories for topics.
- **Logins for Integrations**: In this view, you can add online accounts for Twitter, Facebook, Dropbox™, Google Drive™, SkyDrive, Box™, Evernote®, Toodledo®, and Asana™.
- **In-App Purchases**: In this view, you can make in-app purchases.
- **About** - Shows information for the app, such as version.

Sync

WHAT CAN I DO HERE?

Use device-to-device sync to keep LightArrow app data on your multiple iOS devices (iPad, iPhone, and iPod touch) in sync. Dropbox™ and Box™ cloud services are recommended for device-to-device sync. A Beta Preview of Google

Drive™, SkyDrive, or iCloud™ is also provided for sync. Keep in mind that LightArrow apps only sync when they are open. You can see when the apps are syncing by viewing the green circle around the LightArrow logo on your main screen.

Important: All syncing devices must be updated to the latest version of the app available on the App Store.

If you are trying to perform a sync reset, please scroll below to see that section.

PREREQUISITES

Before you enable sync on your devices, ensure that **all** of the following requirements are met:

- Each device you wish to sync has network (WiFi) connectivity for the initial sync setup.
- If you plan to take advantage of the built-in integration your LightArrow app has with your device's Contacts, Calendar and Reminders apps, please make sure you have those syncing in the iOS Settings app utilizing Apple's iCloud. Our app does not sync those, but expects them to be synced between your devices.
- For the cloud service you wish to use (Dropbox, Box, etc.), make sure you have an account and you know the username and password, and install their app (for example the Dropbox app) on each device, and make sure you can connect.
- If using our iCloud Sync Beta preview, make sure iCloud is enabled in the device Settings of each device you wish to sync.

ENABLING SYNC -- SUMMARY

The first time you enable sync on your devices, all the LightArrow app data from the PRIMARY DEVICE will be copied to the other devices -- no merging of data will initially occur. However, once you enable sync on your devices, modifications on one device will be propagated to the other devices. The Primary Device is the one, which in your opinion has the best data for our app, since it'll be used as the baseline for the other devices.

How to enable sync on your primary device:

1. PRIMARY DEVICE: Go to **Settings** -> **Backup, Restore & Sync.** *You need to create and set an online folder here.* The most popular case is to use Dropbox, so these directions use that as the example. Tap on Backup/Sync online folder (in bottom section). Tap **New** on the pop-up. A view called "New Online Folder" comes up - tap on the **File Service** field.

Now, the file service should have Dropbox already selected (you can change it to Box for example, but let's stay with Dropbox - tap on Close in the selector that has come up. In the **Email** field, type in your Dropbox account email (for example, busybean1222@gmail.com). Tap on **Sign In** - a popup comes up saying you will have to use the exact same email address if a Dropbox login page comes up - tap on **Proceed**. You will either directly get a view that asks you to allow the app to be able to use Dropbox (in which case tap **Allow**), or a view that asks you to enter your Dropbox account email and password - in which case enter those (for example, busybean1222@gmail.com and password), login, then allow access. You should now be back in the "New Online Folder" view. Tap on the gear icon to the right of the **Folder** field. Tap on your email address, then tap **Select** (you'd only need to tap on Browse here if in the less common case, you have already gone to Dropbox directly and created a folder yourself for app backups, for example "AppBackups" - in which case you'd need to Browse, and then Select that one). Once you have tapped on **Select**, you will again be back in the "New Online Folder" view. Tap **Save** on the top right. Tap **Save** AGAIN on the popup (it should be showing your newly created folder with a checkmark next to it).

2. PRIMARY DEVICE: Tap on the **Backup email address** field, and type in an email address of yours that you wish to send email backups to, and save it.
3. PRIMARY DEVICE: Now tap on Online Backup. Let it complete.
4. PRIMARY DEVICE: Now tap on Email Backup. Let it complete and send the email to yourself.
5. PRIMARY DEVICE: Enable Sync: Go into **Configure Sync**. Tap on **Manage** under Dropbox Sync. Tap on the ON/OFF slider in the Sync field to set it to ON. Tap **Continue**, then read what the alert says - it needs to report itself as the first device for the PRIMARY DEVICE. If it is not, cancel and contact support@lightarrow.com, and we'll help you. If correct, continue, let it complete, and tap **OK**.
6. PRIMARY DEVICE: Go all the way back to the Settings view, and then go to the Recent view (accessible from the left column of dashboard navigation icons). Leave the app up in this view - you may see a green circle spinning around the white dot icon on the top left of the screen. Let it complete spinning. For good measure, do a pulldown to refresh in the Recent view (put your finger anywhere in the content area of the Recently Updated view, pull down 2-3 inches, then release). You will see the green

circle spin around again for a few seconds on the top left. That indicates things are either being pushed up to Dropbox, or being pulled down and consumed - basically, the sync operation. Also, below, whenever we say pull-down-to-refresh for the Recent view to force a sync, you can alternatively go to the Settings view and tap on **Sync Now**.

7. Now we are ready to enable sync on the other devices.

How to enable sync on your secondary device(s):

1. SECONDARY DEVICE(S): You can either create and set the same online folder here, or consume the Email Backup that we sent above from the primary device. Steps: If you want to create from scratch, follow step 1 of the PRIMARY DEVICE case exactly. A **common mistake** users make is they tap **Browse** (instead of tapping **Select**), see a folder called LifeTopixSync, and select that. **That is a mistake**, as the LifeTopixSync folder is something we create UNDER the folder you point to (your Dropbox root folder represented by your email address). If you choose the simpler approach (consuming the Email Backup): open your iOS Mail application (it does not work with the gmail app). Find the backup email sent from the PRIMARY DEVICE. Be careful - do a tap-and-hold on the attachment icon lifetopix.backup.xml (instead of a tap), and then choose to open with our app. Your app will come up. Go to the **Settings** -> **Backup, Restore & Sync** view, and tap on **Restore from Inbox**. Let it complete.
2. SECONDARY DEVICE(S): Enable Sync: go into **Configure Sync**. Tap on **Manage** under Dropbox Sync. Tap on the ON/OFF slider in the Sync field to ON. Tap **Continue**, then read what the alert says - it needs to report that the cloud already contains data from your PRIMARY DEVICE. If it reports itself as the first device, cancel and contact support@lightarrow.com, and we'll help you. If correct, continue, let it complete and tap OK.
3. You are all done! Go all the way back to the Settings view, and then to the Recent view. Watch for the green circle spinning at the top left of the screen to complete, and then do a pull-down to refresh.
4. Now when you make changes, they'll go back and forth. Sync happens automatically every minute or so when the app is up. You can always do a pull-down-to-refresh in the Recent view to force a sync.

DISABLING SYNC

When you disable sync on a device, any changes you make to the app's data on that device will get overwritten with whatever is in the cloud at the time **when you later re-enable sync on that device**. The bottom line is that unless you are disabling sync on a device as part of the process to reset sync or you do not wish your device to be synced with other devices any more, you should not disable Cloud Sync.

How to disable sync:

1. Tap **Settings** -> **Backup, Restore & Sync** and tap **Configure Sync**.
2. Tap **Manage** in the section with the service you wish to use.
3. Move the slider to the OFF position.

RESETTING SYNC

How to reset sync:

1. Disable sync on ALL devices from the **Settings** -> **Backup, Restore & Sync** and tap **Configure Sync** view.
2. Do Email and Online backups from the device that has the best date.
3. PRIMARY DEVICE: Tap on **Sync Reset**. Complete the steps. IMPORTANT: this is only done on one device after ALL devices sync have been disabled.
4. Follow the steps as above to enable sync in the primary device first, and then the secondary devices.

IMPORTANT NOTES FOR ICLOUD USERS

In your device Settings, Apple provides you a mechanism to "manage storage" for your iCloud account and for the applications that access it. It is very important that you **not** utilize this interface to manipulate the iCloud storage for your LightArrow app. If you wish to manage the iCloud storage for your LightArrow app, utilize the operations provided for you in your LightArrow app Settings.

Quick Menu

WHAT CAN I DO HERE?

You can find the Quick Menu at the bottom of your LightArrow app. It gives you quick access to the following functions:

QUICK ADD

Quick Add gives you rapid access to creating new items.

How to use Quick Add:

1. Locate the Quick Menu at the bottom left of the left pane of the Dashboard, tap it, and then tap the plus sign to display the Quick Add action panel.
2. If you wish to create a new item (Task, Project, Shopping Item, Appointment, Reminder, Hosting Event, Attending Event, iOS Calendar Item, iOS Reminder, Checklist, Note, File, Bookmark, Locker, Expense, Trip, Visitor, Contact, Service Provider, Asset, Audio, Drawing, Photo, Video or Inbox Item), tap the type of object you wish to create.
3. Enter the details for the chosen item, then tap **Save**.

QUICK LOG

Quickly log health and activity items, such as running, weight, etc. Log items can be configured in the Health + Goals topic.

How to use Quick Log:

1. If you wish to add an entry to one of the Health + Activity logs (Log Form, Activity, Nutrition, Health Stat, Medication, or Wellness), locate the Quick Menu at the bottom left of the left pane of the Dashboard and tap it.
2. Next, tap the log icon (running person), and then tap the log you wish to add an entry to.
3. Next, enter your data, and then tap **Save**.

BACKUP, RESTORE, AND SYNC

Quickly access common backup, restore, and sync functions.

How to use Quick Sync/Backup:

1. If you wish to quickly back up to email, back up to an online folder, or perform an on-demand sync, then use this selection.
2. Tap the sync icon (cloud), and make a selection from the menu.

For more information, refer to:

- Backup and Restore
- Sync

PASSCODE LOCK

To quickly set up a passcode or quickly lock your app, tap the passcode icon (lock).

For more information about passcodes, refer to Secure Your Data.

Common Features

The following topics describe common features in your LightArrow app.

My Settings

WHAT CAN I DO HERE?

In this view, you can set colors; enable AirAccess; set maximum occurrences for repeat schedules; position new note items; position new checklist items; set your default search URL; set your Default Dashboard view; enable or disable deletion of quick inbox items after conversion; set whether or not items that are due later in the same day are overdue; set your default iOS calendar, and set the specifications for iOS calendar reminders.

GLOSSARY OF TERMS

AirAccess™: A free powerful and efficient desktop client that allows you to connect, wirelessly, from your Mac to LifeTopix or My.Agenda running on your iPhone, iPad, or iPod touch. Find AirAccess at the Mac App Store.

Quick Inbox: Captures and holds any type of information quickly so you can provide more detailed information, such as a due date, later as time permits. Quick Inbox items can be converted to other types of objects, such as tasks or appointments.

THEMES

You can customize the appearance of your app by changing the main color and accent color.

How to change the app's theme:

1. In the My Settings view, tap **Main Color** and then tap a color.
2. Tap **Accent Color**, and choose a color by tapping it.
3. Tap **Save**.

DEFAULT DATE TYPE

You can specify the default date type (Date+Time or Date Only) for many types of objects. For example, when you create an object, such as a bill payment, you can specify date only to be indicated as opposed to a date and time. The types of objects that support this setting are appointments, bills, events, notes,

projects, checklists, inbox items, services, shopping items, shopping lists, trips, tasks, and visitors.

How to change the default date types:

1. In the My Settings view, tap **Default Date Type** and then tap a type of object.
2. Tap **Date + Time** or **Date Only** by tapping your selection.
3. After you're finished making your selections, tap **Save**.

ENABLE AIRACCESS

LightArrow AirAccess™ is a powerful and efficient desktop client that allows you to connect, wirelessly, from your Mac to LifeTopix or My.Agenda running on your iPhone, iPad, or iPod touch. In other words, it acts as a convenient remote interface for quickly adding data to your app through typing entries on your Mac. If you plan to run AirAccess on a Mac to connect to LifeTopix or My.Agenda running on your device, you need to set this option to ON. You will also need to enable WIFI via your device's Settings, and connect to a WIFI network before you attempt to establish the connection from AirAccess to this device.

How to enable and use AirAccess:

1. In the My Settings view, switch **Enable AirAccess** to ON.
2. Open AirAccess on the Mac.
3. When your device appears in the list on the Mac, click it to select it and then click **Connect**.
4. Then accept the Incoming Connection Request by tapping **Accept** on your device.

REPEAT SCHEDULES

In some areas of your app, you can set repeat schedules. For example, when you define tasks, bill payments, events, or occasions, you can specify that the item should repeat. The repeat frequency you can select includes daily, weekly, monthly, and yearly. In addition, you can specify the duration of the repeat schedule, which can be a maximum number of occurrences or a specified date. This setting allows you to limit the number of instances of any repeating item to safeguard the performance of the app on your device.

How to set Max Occurrences:

1. In the My Settings view, locate the **Repeat Schedules** section.

2. Select the number of maximum occurrences from the **Max Occurrences** field, and then tap **Save**.

NEW NOTE ITEM

You can choose whether new note items are added to the top or the bottom of your notes. By default, they're added to the top.

How to change the position of new note items:

1. In the My Settings view, locate the **New Note Item** section.
2. Select top or bottom, and then tap **Save**.

NEW CHECKLIST ITEM

You can choose whether new checklist items are added to the top or the bottom of your checklists. By default, they're added to the top.

How to change the position of new checklist items:

1. In the My Settings view, locate the **New Checklist Item** section.
2. Select top or bottom, and then tap **Save**.

ADDING BOOKMARKS

When you add bookmarks to an object, you may find it easier to use a search engine to find your desired URL rather than having to type in the URL yourself. If set, the Search URL specifies the starting page to load when you are using the browser to define a bookmark.

How to set the default search:

1. In the My Settings view, locate the **Adding Bookmarks** section.
2. Tap **Search URL**, and then type the Search URL you wish to use, and then tap **Save**.

DEFAULT DASHBOARD VIEW

You can choose the view that appears when you launch your LightArrow app by changing the default dashboard view. The default dashboard view is the Home (Agenda) view for many LightArrow apps.

How to set the default dashboard view:

1. In the My Settings view, locate the **Default Dashboard View** section.
2. Select a view from the list, and then tap **Save**.

DELETE QUICK INBOX ITEMS AFTER CONVERSION

When you convert Quick Inbox items to LightArrow app items, you can choose if these items remain in the Quick Inbox or if they are removed from the Quick Inbox. By default, items are not removed.

How to set whether or not Quick Inbox items are deleted after conversion:

1. In the My Settings view, locate the **Delete Quick Inbox Items After Conversion** section.
2. Choose YES for the quick inbox items to be removed from the view or choose NO for the quick inbox items to remain in the Quick Inbox.
3. Tap **Save**.

AGENDA VIEW OVERDUE ITEMS BEHAVIOR

You can choose the behavior of overdue items that show in your Agenda view. You can choose whether overdue items include only overdue items, items due later today, or to exclude items due today.

How to change the behavior of overdue items:

1. In the My Settings view, locate the **Agenda View Overdue Items Behavior** section.
2. Choose **Only overdue items**, **Include items due later today**, or **Exclude items due today**, and then tap **Save**.

CREATE LOCAL NOTIFICATIONS

You can choose whether or not local notifications are created by your LightArrow app. Local notifications originate from the device itself as opposed to somewhere outside the device and they schedule an alert to notify you about events. These notifications are presented as an alert box or notification panel with a message accompanied by a sound and the vibration of the device. When you disable local notifications it does not remove notifications that have already been created.

To enable or disable local notifications:

1. In the My Settings view, locate the **Create Local Notifications** section.
2. Choose **Yes** if you wish for your app to create local notifications.
3. Tap **Save**.

Notes about audible reminders:

When you create a time-relevant item in your LightArrow app (task, trip, bill, event, etc.) — behind the scenes, an entry is made into the iOS Calendar, along with a built-in calendar reminder (this is configurable in the LightArrow app My

Settings view). Also, a local notification is registered for the time of the item (for example, the due date/time of a task). Both of those items make a sound, and they respect your configurations in your device's Settings app.

DEFAULT IOS CALENDAR

If your iOS device has multiple calendars configured, your LightArrow app can display information from them and make entries in them. This setting allows you to specify which calendar should be the default for entries added when you create date-oriented items in your LightArrow app.

Note: If you are using device-to-device sync, this value is not synced across devices.

To set your default iOS calendar:

1. In the My Settings view, locate the **Default iOS Calendar** section.
2. Tap the field for **Calendar Title** and choose the calendar you wish to be the default.
3. Tap **Save**.

IOS CALENDAR REMINDERS

Device Calendar reminders make sense for certain objects within your app, and you may want more advance notice for some reminders than for others. For example, you may want to be reminded of your trips five days in advance, but only one hour in advance of each task.

You can configure these settings here. When you create date-relevant objects in your app, entries will be added to your device's Calendar with reminders set according to the preferences you specify here. You can also specify that you want entries added to your device's Calendar without reminders, or that you don't want entries added to your device's Calendar at all.

How to change the timing of reminders for different types of items:

1. In the My Settings view, locate the **iOS Calendar Reminders** section.
2. For each of the item types, choose the timing that works for your life or business.
3. Tap **Save** when complete.

Assets

WHAT CAN I DO HERE?

In your LightArrow app, an **asset** is a resource with monetary value that an individual or business owns or controls, or leases. With assets, you can manage the manufacturer, model, SKU, serial number, or VIN#. In addition, you can manage the seller, purchase information (date, cost and current value), location and context tags.

ASSETS VIEW

In the Assets view, a list of all the assets that you created are listed, and you're able to create, modify, and edit assets. This includes all appliances, computer equipment, electronics, investments, or any other asset you wish to manage.

GROUPING ASSETS IN THE ASSETS VIEW

You can view all your assets in the Assets view by tapping the **Assets** tile in the Home + Assets topic. When you're viewing a list of assets in the Assets view, you can view the list in different ways. You can show all assets; view assets by category or purchase date; view assets by context tag; or view assets by the last updated date. Additionally, you can create an asset that already reflects the category or context tag that you've expanded in this view by tapping a category and then tapping **Tap to add a New Asset** below it.

To group assets:

1. In the Assets view tap the selector at the top-left of the view.
2. Select **Ungrouped**, **Category**, **Purchase Date**, **Context Tags**, or **Last Updated**. The app remembers the previous selection.

NEW ASSET VIEW / ASSET VIEW

You can add, modify, and delete assets. You can also create categories for assets directly from these views.

How to create a new asset:

1. If you're creating a asset from the **assets** view, tap **Tap to add a New asset**.
2. Type a name for the asset and add an optional comment describing the asset.
3. Optionally, add a comment that further describes the asset.
4. Tap the **Seller** tile to select or add the seller of the asset, then tap **Save**.
5. Tap the **Purchase Info** tile and add a **Purchased Date**, **Cost**, and **Current Value**, and then tap **Set**.

6. Tap the **Asset Details** tile and add **Manufacturer**, **Model**, **SKU**, and **Serial#/VIN**, and then tap **Set**.
7. Optionally add context tags to the asset by tapping the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
8. Select or add a category by tapping the **Categories** tile.
9. Optionally, add more data by tapping **Create and Add More Data**. This allows you to associate a location.
10. To add a location for the asset, tap **Location** and select one of the options.
11. Tap **Save**.

MODIFYING ASSETS

How to modify an asset:

1. Tap the **Assets** tile in the Home + Assets topic.
2. Tap the asset you wish to modify and then tap **Open**.
3. Modify the items as directed.
4. Tap **Save**.

DELETING ASSETS

How to delete an asset:

1. Tap the **Assets** tile in the Home + Assets topic.
2. Tap the asset you wish to delete to expand the row, and then tap **Delete**.

ADDING SUB-CATEGORIES FOR ASSETS

You can add subcategories for assets directly from Manage Categories or you can add subcategories while you're in the process of adding assets as described below.

How to add a subcategory for an asset:

1. In the Assets view, tap the asset you wish to add a category for, and then tap **Open**.
2. Tap the **Categories** tile.
3. Tap the plus sign to create a sub-category under any category you wish.
4. Tap **Tap to set name** and then type a name for the sub-category.
5. Optionally add a comment.

6. If you want to hide the category, change the switch to **Yes**. When a sub-category is hidden, it no longer appears in the Categories tile, but it remains defined, and is still available in the category list.
7. Tap **Save**.

ASSOCIATING ITEMS WITH ASSETS AND SERVICES

The Home + Assets topic helps you to be more productive by allowing you to associate tasks, appointments, reminders, notes, checklists, files, bookmarks, expenses, services, audio, photos, videos, and drawings to assets. For example, if you've added an asset that represents an Automobile, you might set up services with the company you use for auto repair/service and you'll to be able to easily see all services associated with the automobile in one place. By associating services with the automobile, you have a central location to all repairs for that vehicle.

Refer to Services to learn more about associating items with Services.

How to associate a task with an asset:

You can associate an asset with a task or a task with an asset.

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select an asset that you want to associate it with.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate an appointment with an asset:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a an Asset, follow the procedure below.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.

3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add status, an optional comment, full dates, context tags, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a note with an asset:

You can create a note in the Notes + Files, Lists topic and associate it with an asset (or) you can associate a note to an asset directly from the Home + Assets topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate a reminder with an asset:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to an asset, follow the procedure below.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.

3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a checklist with an asset:

You can create a checklist in the Notes + Files, Lists topic and associate it with an asset in the Home + Assets topic (or) you can associate a checklist to a task directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes + Files, Lists help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate a file reference with an asset:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with an asset (or) you can associate a file reference to an asset directly in the Home + Assets topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.

3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate a bookmark with an asset:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Home + Assets topic (or) you can associate a bookmark to a Home + Assets topic directly from the Home + Assets topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate an expense with an asset:

You can create an expense in the Finances topic and associate it with an asset (or) you can associate an expense to an asset directly from the Home + Assets topic. For detailed information about expenses, refer to the Finances help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.
5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.

6. Add other optional information.
7. Tap **Save**.

How to associate a service with an asset:

You can create a service in the People + Services topic and later associate it with an asset in the Home + Assets topic (or) you can add a service directly in the Home + Assets topic. For detailed information about services, refer to the People + Services help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing service item, tap **Service** and select the service you want to add by tapping it.
5. If you're adding a new service, tap **Service** and add the necessary information for the service.
6. Add other optional information.
7. Tap **Save**.

How to associate photos, audio, drawings, or video with an asset:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in Education (or) you can associate a media item with an asset directly from the Home + Assets topic. For detailed information about creating media items, refer to the Media help.

1. Locate an asset by tapping the **Assets** tile in the Home + Assets topic.
2. Tap the asset and then tap **Open**.
3. Tap the plus sign at the bottom of the view and select **Create New** or **Choose Existing** from the menu.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the item.

Audio

WHAT CAN I DO HERE?

There are several areas in your LightArrow app where you can associate audio clips with items, such as projects, when you wish to provide more information through recordings. For example, you can easily record audio during a meeting and then associate with an event to help you remember the details. You can also keep private audio clips in lockers.

How to add a new unassociated audio clip:

1. Tap the Media topic in the My Topics view.
2. Tap the plus sign in the upper right of the Media view and tap **Audio**.
3. Tap the microphone to start recording and then tap it again to stop.
4. Name the audio clip in the New Audio view, optionally add context tags to it, and then tap **Save**.
5. The clip is saved.
6. This audio clip can be found by tapping the **Audio** tile in the Media view and then tapping **Audio not in Albums**.
7. If you wish to add an associated topic to it and a location, you can re-open this clip and add those items by tapping the appropriate tiles.
8. You can also play the audio after opening it.

How to associate audio clips to LightArrow app items:

1. Access the object you wish to associate an audio clip with, such as a project, event, trip, etc.
2. Tap the plus sign in the Associated Items section.
3. Choose **Choose Existing**.
4. Choose **Audio**.
5. Select the audio clip.
6. The audio clip is selected and placed into the Audio view and the clips become available for listening in the Associated Items section for the project, event, trip, etc.

How to associate audio clips to LightArrow app items (from the audio clip):

1. Tap the Media topic in the My Topics view.

2. Tap the **Audio** tile.
3. Locate the audio clip in "Audio not in Album." Audio in albums cannot be associated with topic items.
4. Tap the clip and then tap **More**.
5. Choose **Associate topic**, tap a topic, and then choose an item from the list.

How to share audio clips via email:

1. Tap the Media topic in the My Topics view.
2. Tap the **Audio** tile.
3. Locate the clip in one of the albums or in "Audio not in Album."
4. Tap the clip and then tap **More**.
5. Choose **Share Via Email** and send the email.

How to delete audio clips:

1. Tap the Media topic in the My Topics view.
2. Tap the **Audio** tile.
3. Locate the clip in one of the albums or in "Audio not in Album."
4. Tap the clip and then tap **More**.
5. Choose **Delete**.

For more information about audio albums, refer to Media.

Bookmarks

WHAT CAN I DO HERE?

Bookmarks allow you to save the address (URL) of a website or web page so that you can easily re-visit the page at a later time. In your LightArrow app, bookmarks also allow you to manage usernames and passwords for sites that require this information, such as sites for banking, shopping, photo sharing sites, and others. This way, you don't have to memorize a variety of passwords.

Keep in mind; your data is always stored only on your device, unless you choose to use Cloud sync via Dropbox, Box, or other cloud services. In addition, your LightArrow secret data is secure with military grade 256-bit Advanced Encryption Standard (AES) encryption. The Advanced Encryption Standard (AES)

is one of the most commonly used and secure encryption algorithms available today.

GLOSSARY OF TERMS

Bookmarks: Bookmarks allow you to save the address (URL) of a website or web page so that you can easily re-visit the page at a later time. In your LightArrow app, bookmarks also allow you to manage usernames and passwords for sites that require this information, such as sites for banking, shopping, and others. This way, you don't have to memorize a variety of passwords.

Lockers: Lockers allow you to save secret information for any information you wish to secure. Lockers support securing of text, photos, and audio. Common uses include storing of photos of credit cards, photos of passports, photos of secret receipts, sensitive audio files, and PINs.

MANAGING BOOKMARKS

You can create bookmarks in many places of your LightArrow app. Common areas to create bookmarks are through My Inboxes, the Media topic, or the People + Services topic. The procedure below describes how to manage bookmarks directly from the Bookmarks + Lockers topic.

How to create new bookmarks:

1. In the Bookmarks + Lockers view, tap the plus sign and choose **Bookmark**.
2. Search for the site or type the site location and tap **Search**.
3. When the URL properly displays, tap **Save**.

Once a bookmark is created, you can set up your username and password for online access.

Setting up usernames and passwords for online access:

1. Tap the **Bookmarks** tile.
2. Tap the bookmark you wish to add online access for, and then tap **Configure**.
3. Type a username into the **Username** field.
4. Type a password into the **Password** field.
5. Tap **Save**.

If you wish to change a bookmark, set categories, set context tags, or add associated topics and associate contacts, follow the procedure below.

To modify bookmarks:

1. Tap the **Bookmarks** tile.
2. Tap the bookmark you wish to edit, and then tap **Configure**.
3. Tap the URL field to change the text of a bookmark or tap the globe to search for a site and change the bookmark.
4. Type a username into the **Username** field.
5. Type a password into the **Password** field.
6. Tap the **Categories** tile to add or change the category of the bookmark (select the categories and then tap **Save**).
7. Tap the **Context Tags** tile to add or change the context tags of the bookmark (select the contexts tags and then tap **Save**).
8. Tap the **Associated Topics** tile to add or change the topics that are associated with the bookmark (tap **Add**, and select the topic to associate).
9. Tap the **Associated Contact** tile to add or change the contacts that are associated with the bookmark (tap **Add**, and select the contact to associate).
10. Tap **Save**.

Tip: Adding categories and context tags to bookmarks allows you to group and view your bookmarks in the Bookmarks view by **Category** or **Context Tag**, which allows you to easily organize and find your bookmarks.

How to delete bookmarks:

1. Tap the **Bookmarks** tile.
2. Tap the bookmark you wish to delete and then tap **Delete**.

How to access your Online Access credentials:

1. When you access the object that includes online access, tap the **Bookmarks** tile, then tap the bookmark.
2. Tap **View**.
3. Tap the Lock icon at the top of the view.
4. Enter your PIN.
5. The login name and password appears at the top.

HISTORY VIEW

If you wish to view your web viewing history from your LightArrow app, follow the procedure below.

1. Access a bookmark.
2. Tap the Clock icon at the top of the History view.
3. **Clear All**.

VIEWING AND GROUPING BOOKMARKS

1. Tap the **Bookmarks** tile.
2. From the filter at the top of the view, tap **Ungrouped**, **Category**, **Last Updated**, or **Context Tag**.
3. Bookmarks representing the selected date, category, or contact tag display.

Checklists

WHAT CAN I DO HERE?

Checklists are multi-purpose items in your LightArrow app. They're used to remember a list of items that are required for a particular function (such as a packing list for a vacation), things to be done (such as things to do at work), or thoughts to be considered (such as important points at a meeting). Checklists can be used over and over again in your LightArrow app. For example, you can create a packing list for business trips and use it over and over in order to avoid forgetting things when you're traveling. You can create checklists in many areas of your LightArrow app, but typically you'll use the Agenda view or the Notes + Files topic to create, modify, and delete your checklists.

CHECKLISTS

How to create a checklist:

1. In the Agenda View, tap the plus sign in the **Alerts & Agenda Checklists** section and select **New Agenda Checklist** (or) in the Notes + Files topic, tap the plus sign and tap **Checklist**.
2. Type a name, due date, and comment in the respective sections.
3. Optionally, tap **Tap to show additional info** if you wish to add context tags to the checklist.
4. Tap **Tap to add Checklist Item** to add items to the checklist.

5. Tap each item you wish to add to your checklist by typing the text and then tapping **Save**.
6. Tap **Save** to save the checklist.
7. After you save the checklist, you can add associations to other topic items by opening it, tapping **Tap to show additional info**, and tapping **Associated Topic.**

How to modify a checklist or add items to it:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to modify.
2. Tap the checklist and then tap **Open**.
3. Edit the name, due date, and comment in the respective sections.
4. Optionally, tap **Context Tags** if you wish to add context tags to the checklist. (If this tile is not showing tap, **Tap to show additional info**.)
5. Optionally, tap **Associated Topic** if you wish to associate other topic items to the checklist. (If this tile is not showing tap, **Tap to show additional info**.)
6. Tap the plus sign to add new checklist items.
7. Tap each item you wish to modify in your checklist, edit it, and then tap **Save**.
8. Tap **Save** to save the checklist.

How to reorder items in a checklist:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to modify.
2. Tap the checklist and then tap **Open**.
3. In the Checklist view, tap the **Reorder** icon (three lines) and choose **Reorder Alphabetically** to alphabetize the list or choose **Reorder Manually** to arrange the list manually.
4. If you choose **Reorder Manually**, tap the **Reorder** icon (three lines) and drag the list item up or down.
5. Tap **Done**.
6. Tap **Save** to save the checklist.

How to copy checklist items, and to move items to a different checklist:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to modify.
2. Tap the checklist and then tap **Open**.
3. To copy items, in the Checklist view tap the More Actions icon and select **Copy**.
4. To duplicate and move items, in the Checklist view tap the More Actions icon, select **Copy To**, and choose the checklist you wish to copy the item to.
5. To move items (without duplication), in the Checklist view tap the More Actions icon, select **Move**, and choose the checklist you wish to move the item to.
6. Tap **Save** to save the checklist.

How to check all checklist items:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to modify.
2. Tap the checklist and then tap **Open**.
3. In the Checklist view, tap the **Check** icon and confirm.
4. Tap **Save** to save the checklist.

How to uncheck all checklist items:

If you wish to use a checklist over and over, you can uncheck all the items at once.

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to modify.
2. Tap the checklist and then tap **Open**.
3. In the Checklist view, tap the **Uncheck** icon and confirm.
4. Tap **Save** to save the checklist.

How to duplicate (copy) entire checklists:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to duplicate.
2. Tap the checklist and then tap **Open**.
3. In the Checklist view, tap **Actions** and then select **Copy**.
4. Confirm the copy.

5. The checklist is duplicated and opened.

How to export a checklist to a comma-separated (CSV) for importing into a spreadsheet:

Sometimes, you might want to export items to a CSV file for further analysis in a spreadsheet.

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to export.
2. Tap the checklist and then tap **Open**.
3. In the Checklist view, tap **Actions**.
4. Tap **Export** and then email the CSV file to an email account.

How to delete a checklist:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to delete.
2. Tap the Checklist, and then tap **Delete**.

PRINTING, SHARING, AND DISCUSSING CHECKLISTS

You can print individual checklists, share checklists via email (e.g. for a roommate, family member, employee or colleague) or discuss checklists via social media or SMS. Users who receive a checklist via email can manage it in their LightArrow app.

How to print a checklist:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to print.
2. Tap the checklist, and then tap **Open**.
3. Tap **Actions** and then tap **Print**.
4. A PDF file is created and an alert appears asking if you wish to save the document as a local document. If so, tap **Yes**; otherwise tap **No**.
5. Tap the Share icon at the top of the view and then tap **Print**.
6. Print the document to the selected printer.

Note: You can also open the PDF document and save it to an online service, such as Dropbox, by tapping the Share icon and choosing an online service.

How to share a checklist via email:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to share.
2. In the Checklists view, tap the list you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient and then tap **Send** to send the email.

How to collaborate about a checklist:

1. In the Agenda View or the Notes + Files topic, locate the checklist you wish to discuss.
2. In the Checklists view, tap the list you wish to discuss and tap **Open**.
3. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.
4. A message displaying, "I'm creating a checklist (checklist name). Any recommendations?" appears.
5. Modify the message as desired and send it.
6. If you wish to view the replies at a later time, tap **View Replies**.

Contacts

WHAT CAN I DO HERE?

In your LightArrow app, there are several options for contacts management beyond what the built-in app on your device provides. For example, for your contacts, you can manage names, comments, birthdays, anniversaries, events, projects, tasks, appointments, trips, visits, notes, phone numbers, email addresses, cities, streets, states, zip codes, timestamps, reminders, expenses, device emails, device phone numbers, job titles, nicknames, and companies. In addition, you can add your contacts to contact groups so they're better organized. This is particularly useful for those who manage a lot of contacts as clients or those who are in sales.

All of the contacts can be viewed in a spreadsheet-like grid view, which allows you to easily edit their information. For example, if you're planning an event, you can easily see all of the invitees in the Contacts view in a spreadsheet-like table -- which makes event planning a breeze. And keep in mind that LightArrow provides integration with your iOS contacts so information can be easily shared between the two apps. You can also easily contact the people who you're managing in your contacts via phone, email, Facebook message, Twitter, SMS,

or Email. In addition, you can view their latest Facebook messages and Tweets without leaving your LightArrow app.

Note: Many advanced contact management features are available via the Pro Contacts in-app purchase.

CONTACT GROUPS

Before you start adding contacts, it's a good idea to create contact groups so you can better organize your contacts and add multiple contacts from your iOS calendar all at once.

For information about creating contact groups, refer to People + Services.

CONTACTS VIEW

You can associate contacts with many items in your LightArrow application. The Contacts view appears when you're adding contacts to an item, such as an event. You simply tap the contacts you wish to include and then tap **Save**.

When you're managing contacts from the People + Services topic, the Contacts view provides a table view and a grid view for managing contacts. The table view includes a list of all your contacts in alphabetical order. In this view you can add new contacts; open contacts; communicate with contacts via phone, email, or text; and delete contacts. When you open contacts, you have more options, such as viewing all their Twitter and Facebook social media posts and managing the data for the contact. Seeing social media posts in one view makes it easy to get a complete picture of the person you're communicating with -- and eliminates the need to open several different apps to collect this information.

To see your contacts in a spreadsheet-like view, called a grid view, you tap the icon shown in the upper right. All of your contacts are listed in rows, and you can change the data for many of the cells by tapping the cells and changing it directly. You can choose the data that is shown by tapping the Filter icon. The data you can view includes: Name, Comments, Groups, Birthday, Anniversary, Events, Projects, Tasks, Appointments, Trips, Visits, Notes, Phone, Email, City, Street, State, Zip, Timestamp, Reminders, Expenses, Device Email, Device Phone, Job Title, Nickname, Company, and/or any custom fields. You can also group the data by context tag, birthday, last updated, anniversary, group, state, city, zip, last name, or company by using the control in the upper left. If you wish to add a new contact, tap the plus sign in the upper right.

Note: You can also contact the person or business directly from the cells by tapping the data items.

MANAGING CONTACTS

How to add a new individual contact that's not in your iOS contacts:

You can add contacts directly to your LightArrow app and choose whether or not to add the contact to your iOS contacts.

1. In People + Services, tap the plus sign.
2. Tap **Contact**.
3. Add the details, such as a name, job title, and company or tap **Import from iOS Contacts** to obtain the details from your iOS contacts.
4. If you want to add more detail, tap **Create and Add More Data**.
5. Tap the available tiles to add more detail, such as phone numbers, email addresses, birthday, anniversaries, groups, context tags, location, and social media links.
6. Tap **Save**.

How to link a contact that you created in your LightArrow app to an iOS contact:

Sometimes you might want to create a contact and link it to one of your iOS contacts. You can always unlink it later by following the same procedure below and tapping **Unlink from iOS Contact**.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. Tap the contact and then tap **Open**.
3. Tap **iOS Contact**, and then tap **Link with iOS Contact**.
4. Choose a contact and then tap **Save**.

How to edit/modify a contact:

If you wish to change the information for a contact or add details to it, follow the procedure below.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Modify any of the information by tapping the fields or tiles, and then complete the available fields.
4. Tap **Save**.

How to add a photo to a contact:

After you add and save a contact, you can add a photo to it that shows in the tile for the contact to help you quickly identify the person or other entity. If your

contact already has a photo associated with the contact in iOS, and the contact in your LightArrow app is associated with an iOS contact, then the photo shows in the tile, by default.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it, and then tap **Open**.
3. Tap **Add Photo** in the upper left corner, and then choose an option to take or select a photo.
4. When the photo has been added, tap **Save** to save the contact.

How to add a job title and company to a contact:

You can add a company to your contact by following the procedure below.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it, and then tap **Open**.
3. Tap **Job Title, Company**.
4. To add the job title, tap **Title** and type the title.
5. To add the company, choose a company that's been created (once they are added, they are available for selection for all contacts) or tap **Add** to add a new company.
6. In the New Company view, set the name of the company, and then add an optional description and URL by tapping the respective fields.
7. Tap **Save**. The company is added to the contact and is now available for selection for other contacts.

How to add phone numbers to a contact:

You can add a primary and secondary phone number to a contact by following the procedure below.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Tap the **Phone Numbers** tile.
    1. You can add a custom Primary Phone to the contact by typing it in the **Custom Primary Phone** field (this does not need to be shared with your iOS contacts - it can be stand-alone in your LightArrow app).

    2. Secondary phone numbers from the associated iOS contact are listed below the **Custom Primary Phone** field. You can choose the primary phone number by tapping it and then tapping **Save**.

4. Tap **Save**.
5. Continue by editing other information for the contact or tap **Save** to close the view.

How to add email addresses to a contact:

You an add a primary and secondary email address to a contact by following the procedure below:

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Tap the **Phone Numbers** tile, type the numbers, and then tap **Save**.
4. Continue by editing other information for the contact or tap **Save** to close the view.

How to add personal dates to a contact:

You can add dates such as birthdays and anniversaries to contacts by following the procedure below:

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Tap the **Personal Dates** tile, and type the birthday and anniversary dates, and then tap **Save**.
4. Continue by editing other information for the contact or tap **Save** to close the view.

How to add context tags to a contact:

Tags are used to organize information. In the Getting Things Done® (GTD®) methodology developed by David Allen, Contexts are typically based on a physical location, resource, or the equipment that's necessary to complete a task. Examples of Contexts are office, home, grocery store, etc. Productivity is increased when you're not "switching contexts." For example, you're more productive if you return phone calls during blocks of time, rather than switch to a different task — such as graphic design or coding.

If you've assigned context tags to items such as contacts, you can view the items directly from the My Contexts view of the Dashboard. This allows for quick access to these items.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Then tap **More**, and select **Tags**.
4. Choose tag(s) and then tap the back button.

How to add a location to a contact:

You can add a geographical location to a contact by following the procedure below:

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Tap the **Location** tile, and and choose one of the location choices below:
    1. **Full Address**: Allows you to type a full address for the item.
    2. **Set Location to "Here"**: Sets the location to the nearest location.
    3. **Specify/Show on Map**: Searches for the location and chooses it or sets it to a typed position.
    4. **Clear Location**: Removes the location.
    5. **Show Nearby**: Shows the Near Me view so you can view items near to this location.
4. When the map appears with the pin in the correct location, tap **Save**.
5. Continue by editing other information for the contact or tap **Save** to close the view.

How to add a social media handles to a contact:

You can add social media handles for Twitter and Facebook directly for the contact. This is useful to learn more about your contact (from one place) before starting a conversation with them.

1. Locate the contact by tapping the **Contacts** tile or the **Groups** tile.
2. After you locate the contact in the list, tap it and then tap **Open**.
3. Tap the **Social** tile, and then tap **Configure Ids**.
4. For Twitter, type the user's handle or use the search to find the person.
5. For Facebook, type the user's id (found on the Facebook URL bar) or use the search to find the person.
6. Tap **Save**.

How to delete a contact:

If you no longer wish to include a contact in your LightArrow app, you can delete it. If you delete a contact from your LightArrow app and it is linked to an iOS contact, then you should also delete the iOS contact if you no longer wish for it to be accessible from your device. There are several ways to delete contacts, which are described below.

1. Locate the contact's tile by tapping the **Contacts** tile or the **Groups** tile.
2. Locate the contact in the list, then tap **More.**
3. Select **Delete** and confirm the deletion.

How to edit contacts in the grid view:

You can add and edit contacts in a spreadsheet-like view for faster editing.

1. Tap the **Contacts** tile.
2. Tap the grid icon in the upper right below the plus sign.
3. Group the contacts in the way you wish to view them by choosing Ungrouped, Context Tag, Birthday, Last Updated, Anniversary, Group, State, City, Zip, Lastname, Company, or any custom value.
4. If the contacts are grouped, tap the group's name.
5. Tap inside any cell to modify or add information.
6. Tap **Save**.

Tip: If you wish to hide any of the columns in the grid view, tap the **Filter** icon.

Tip: If you wish to search for contacts in the grid view, tap the Search icon and type a search term.

Associated Items:

When you tap **Show All Associated Items**, the app shows all data items that are BOTH contained in the contact, as well as data items that are associated otherwise (for example, when that contact is a task owner, but the task is not necessarily contained in that contact). For example, imagine you added Task A to a contact and separately made that contact the task owner of Task B. Then, **Show All Associated Items** will show both tasks. Grouping by Association, Type, etc., gives you more insight on why the various items display. However, the icons in the Associated Items section only have a badge count (and show) the items directly contained in the Contact, so in this case, only Task A appears.

How to add custom data for contacts:

Refer to People + Services for information about creating custom fields for contacts.

INTERACTING WITH CONTACTS AND GROUPS OF CONTACTS

For more information about interacting with contacts, refer to People + Services.

IMPORTING MULTIPLE CONTACTS FROM A .CSV FILE

If you wish to add several contacts to your LightArrow app, you can import those contacts from a .csv file. In order to do so, you must build your spreadsheet with the rows and columns as shown in the sample below (HINT, you can copy this table and paste it directly in a spreadsheet):

Name	Notes	Phone	Email	City	Street	State	Zip	Latitude	Longitude	JobTitle	Company	Birthday	Anniversary
Jennie Smith	My Notes	555-555-5555	jmith@email.com	Austin	6th Street	TX	78732	30.37	-97.89	Contractor	LightArrow, Inc.	1985-01-01	1995-03-04

If you can't read the table above due to a smaller screen, the fields are listed below:

Column Headings:

Name, Notes, Phone, Email, City, Street, State, Zip, Latitude, Longitude, JobTitle, Company, Birthday, Anniversary

Examples:

Jennie Smith, My Notes, 555-555-5555, jmith@email.com, Austin, 6th Street, TX, 78732, 30.37, -97.89, Contractor, LightArrow, Inc., 1985-01-01, 1995-03-04

Tips

- The file name must end with …People.csv
- Name is the only mandatory column
- The header name is case insensitive, so “name" or “NAME” refer to the same thing
- The default date format is yyyy-mm-dd, however you can override it, such as: Birthday&MM/dd/yyyy
- If you're using Microsoft Excel for Mac to create the file, save the file using Windows CSV format

How to open the .csv file in your LightArrow app:

1. Create the file as described above.
2. Email the file as an attachment to an email address that you can access from the default email program on your Apple device.

3. Open the email by using your Apple device.
4. Tap the file download in the email, and then tap and hold it.
5. Choose your LightArrow app from the list of apps that appear to import the list.
6. Accept the download in your LightArrow app.

Drawings

WHAT CAN I DO HERE?

In your LightArrow app, you can hand-write and draw with your finger or stylus. Drawing tools include 35 beautiful colors with alpha options; line width choices; eraser; clear; undo; and email capabilities for drawings. Printing is also available for drawings. Once you create a drawing, you can associate it with assets, events, goals, notes, products, projects, services, service providers, subjects, trips, or visitors. When you create a drawing or handwritten note, a note item is created that you can manage in the Notes + Files topic.

How to create new stand-alone drawings:

You can create drawings within notes or you can create stand-alone drawings, which are saved in a .jpg format. You access stand-alone drawings by tapping the **Drawings** tile, and then tapping "Drawings not in Notes."

1. In the Notes + Files, Lists topic, tap the plus sign and choose **Drawing**.
2. Tap the pen icon at the bottom of the view.
3. After tapping the pen icon, you're given a variety of choices for colors, widths, alpha options, and shapes.
4. If you wish to erase any portion of your drawing, tap the eraser tool.
5. To save the drawing and create a new one, tap the plus sign at the top of the view.
6. If you wish to share the drawing or notes via email, Twitter, Facebook, or Camera Roll, tap the Share icon at the bottom of the view.
7. If you wish to clear the drawing and start over, tap the Share icon and then tap **Clear Drawing**.
8. Tap **Save**.

How to create drawings within notes:

You can create drawings within notes or you can create stand-alone drawings, which are saved in a .jpg format. You access drawings in notes by tapping the Drawings tile, and then tapping the name of the associated note.

1. In the Notes + Files, Lists topic, tap the plus sign and choose **Note**.
2. Name the note, optionally enter a date, and then tap **Full Details**.
3. Tap **Draw**.
4. Tap the pen icon at the bottom of the view.
5. After tapping the pen icon, you're given a variety of choices for colors, widths, alpha options, and shapes.
6. If you wish to erase any portion of your drawing, tap the eraser tool.
7. To save the drawing and create a new one, tap the plus sign at the top of the view.
8. If you wish to share the drawing or notes via email, Twitter, Facebook, or Camera Roll, tap the Share icon at the bottom of the view.
9. If you wish to clear the drawing and start over, tap the Share icon and then tap **Clear Drawing**.
10. Tap **Save**.

How to associate drawings with LightArrow app items:

1. Tap the **Drawings** tile in the Notes + Files, Lists view.
2. Locate the drawing in the Drawings view.
3. Tap the drawing.
4. Tap **More** and then choose **Associate Topic.**
5. Choose a topic and then tap the topic item you wish to associate the drawing to.

How to share drawings:

1. Tap the Notes + Files, Lists topic in the My Topics view.
2. Tap the **Drawings** tile.
3. Locate the drawing.
4. Tap the drawing and then tap **Share**.
5. Choose Email, Twitter, or Facebook and complete the sharing actions.

How to delete drawings:

1. Tap the Notes + Files, Lists topic in the My Topics view.
2. Tap the **Drawings** tile.
3. Locate the drawing and then tap **Delete**.

Folders and Files

WHAT CAN I DO HERE?

In your LightArrow app, you can access folders and files from Dropbox™, Box™, Microsoft OneDrive™ (SkyDrive), and Google Drive™. In addition, you can save local files and access those local files in the Notes + Files topic. The purpose of accessing online files is for associating files with topics in your app. For example, you might have created a landscaping project and you wish to associate all your invoices, plans, and notes from this project to your landscaping project to help you better organize it. Or perhaps you're a recruiter -- you can associate resumes that you store in Dropbox or Box with individual contacts.

When you add online files or use local files, you can:

- Associate those files with assets, events, goals, notes, products, projects, services, service providers, subjects, trips, or visitors.
- Associate files with contacts.
- View files from online services.
- Add context tags to online files and sort by context tag.
- Mail, print, email, text, and Airdrop files.
- Move files from one online service to another.

How to add access to online folders:

1. In the Notes + Files, Lists topic, tap **Folders**.
2. Tap the plus sign.
3. In the New Online Folder view, tap the **File Service** field and choose **Dropbox**, **Box**, **Microsoft SkyDrive**, or **Google Drive**.
4. In the **Email** field, type the email address that you use for the service that you selected.
5. Tap **Sign In**.
6. Sign into the service as directed, following the on-screen instructions.

7. In the **New Online Folder** view, tap **Tap to set name** to designate a name for the folder you want to access. If you don't type a name, it will be added for you.
8. Tap **Folder** to select a Folder you want to access. The **Please select a folder...** view displays.
9. Tap a folder (the top level shows the account's name for some services) and then tap **Browse** to see folders inside the folder hierarchy.
10. When you locate the folder you wish to access, tap **Select** (to go back to the top level, tap the **Home** icon).
11. The New Online Folder view displays. You can tap any of the fields to modify their data, such as the **Name** or **Comment**. You can also sign out if you wish by tapping **Sign Out**.
12. Tap **Save** to save the folder. Now you're ready to access files from your added folder.

How to add files from online folders:

1. Follow the previous set of steps to set up access to your online folders.
2. Tap the **Files** tile in the Notes + Files, Lists view.
3. Tap the plus sign in the **All Files** view.
4. Tap the **Folder** field in the **New File** view.
5. Select an online folder or tap **New** to set up a new online folder as described above.
6. Tap the information icon in the **File** field to access the available files.
7. Tap the file you wish to access and then tap **Select** or **View**. **Select** adds it for permanent use. **View** allows you to view the file only.
8. After tapping **Select**, the new file appears in the **New File** view. Tap **Save** to save it.

How to access local files:

In some cases, you might have saved PDF files or image files to a local folder in your LightArrow app. To access those files, follow the procedure below:

How to add files from local folders:

1. Tap the **Files** tile in the Notes + Files, Lists view.
2. Tap the plus sign in the **All Files** view.
3. Tap the **Folder** field in the **New File** view and choose **Local Files**.

4. Tap the information icon in the **File** field and then choose a folder such as **My Documents** or **Media**.
5. Tap the file you wish to access and then tap **Select** or **View**. **Select** adds it for permanent use. **View** allows you to view the file only.
6. After tapping **Select**, the new file appears in the **New File** view. Tap **Save** to save it.

How to associate files to topic items:

1. Tap the **Files** tile in the Notes + Files, Lists view.
2. Tap a file that you've added in the All Files view.
3. Tap **More** and select **Associate topic**.
4. Tap a topic name and then select an item.
5. The item is associated.

How to associate context tags to files:

1. Tap the **Files** tile in the Notes + Files, Lists view.
2. Tap a file that you've added in the All Files view.
3. Tap **Tags** and select a context tag. Then tap the back arrow.
4. The contact is associated.

How to view and print files from online services:

1. Tap the **Files** tile in the Notes + Files, Lists view.
2. Tap a file that you've added in the All Files view.
3. Tap **View** to view the file.
4. To print the file, tap the share icon in the upper right.
5. Tap **Print**.

How to move files between online services (or) email, AirDrop or text message online files:

1. Tap the **Files** tile in the Notes + Files, Lists view.
2. Tap a file that you've added in the All Files view.
3. Tap **View** to view the file.
4. To move the file, tap the share icon in the upper right.
5. Tap the icon for the online service you wish to move the file to (or) choose an AirDrop Recipient, the Message icon or the Mail icon to send the file.

How to move files located in folders between online services; download locally; Email or Associate with Topics:

1. Tap the **Folders** tile in the Notes + Files, Lists view.
2. Tap the folder that the file is contained in that you wish to work with.
3. Tap **Browse** to locate the file.
4. Drill down into the folders to find the file.
5. When you locate the file, tap it.
6. Choose the option you wish to select, (**View**, **Email**, **Download**, **Copy to Folder**, or **More** "**Associate")**.
7. Complete the on-screen options.

iOS Notifications

WHAT CAN I DO HERE?

The LightArrow app reminds you of items are are due; however, you can add iOS local notifications for several different types of items including:

- Projects
- Tasks
- Events
- Appointments

How to set local notifications for an item:

1. Tap the **iOS Calendar** tile.
2. Tap **Show iOS Notifications**.
3. Tap the plus sign and choose the date and time you wish to be notified.
4. Tap **Save**.
5. Tap the back arrow.

Note: You can also disable all new local notifications from the app by using the **Create Local Notifications** option in My Settings.

Lockers

WHAT CAN I DO HERE?

Lockers in your LightArrow app allow you to save secret information for data you wish to secure. Lockers support securing of text, photos, and audio. Common uses include storing of photos of credit cards, photos of passports, photos of secret receipts, sensitive audio files, and PINs.

Keep in mind; your data is always stored only on your device, unless you choose to use Cloud sync via Dropbox, Box, or other cloud services. In addition, your LightArrow secret data is secure with military grade 256-bit Advanced Encryption Standard (AES) encryption. The Advanced Encryption Standard (AES) is one of the most commonly used and secure encryption algorithms available today.

GLOSSARY OF TERMS

Bookmarks: Bookmarks allow you to save the address (URL) of a website or web page so that you can easily re-visit the page at a later time. In your LightArrow app, bookmarks also allow you to manage usernames and passwords for sites that require this information, such as sites for banking, shopping, and others. This way, you don't have to memorize a variety of passwords.

Lockers: Lockers allow you to save secret information for any information you wish to secure. Lockers support securing of text, photos, and audio. Common uses include storing of photos of credit cards, photos of passports, photos of secret receipts, sensitive audio files, and PINs.

MANAGING LOCKERS

The procedure below describes how to manage lockers from the Bookmarks + Lockers topic. You can have multiple locker items in lockers.

How to create new lockers and add locker items:

1. In the Bookmarks + Lockers view, tap the plus sign and choose **Locker**.
2. Type a title and a comment and then tap **Add Locker Item**.
3. For a text-based locker item such as a PIN, choose **Text** and type the name, such as "ATM PIN" into the **Field** field and type the value, such as the number, into the **Value** field.

4. For a photo-based locker item, choose **Photo**, take a photo, and tap **Save**.
5. For an audio-based locker item, choose **Audio**, record the audio, and tap **Save**.
6. Tap **Save** for the locker.

How to add titles to photos or audio-based items:

1. Tap the **Lockers** tile.
2. Tap the locker that contains the locker item you wish to change.
3. Tap **Open**.
4. Enter your PIN.
5. Tap the image or audio file, and then tap **Config**.
6. In the **Title** field, tap the new name.
7. Tap **Save**. This title will show when you tap **View** for a Locker, but it does not change the name of the original photo or audio file.

How to modify lockers and add locker items:

1. In the Bookmarks + Lockers view, tap the **Lockers** tile.
2. In the **Lockers** view tap the locker you wish to modify and then tap **Open**.
3. Enter your PIN as requested.
4. If you wish to modify the title or comment, tap the new information into the available fields.
5. To modify a locker item, tap it and then tap **Edit**.
6. For a text-based locker item such as a PIN, choose **Text** and type the name, such as "ATM PIN" into the **Field** field and type the value, such as the number, into the **Value** field.
7. For a photo-based locker item, choose **Photo**, take a photo, and tap **Save**.
8. For an audio-based locker item, choose **Audio**, record the audio, and tap **Save**.
9. Tap **Save** for the locker.

How to delete lockers:

1. In the Bookmarks + Lockers view, tap the **Lockers** tile.

2. In the **Lockers** view tap the locker you wish to delete and then tap **Delete**.
3. Type the PIN and then item is deleted.

How to delete locker items:

1. In the Bookmarks + Lockers view, tap the **Lockers** tile and then tap the name of the locker you wish to delete items from. Tap **Open** and enter your PIN.
2. In the **Lockers** view tap the locker you wish to delete a locker item for and then tap **Delete**.
3. Confirm the deletion.

How to view items in lockers:

1. In the Bookmarks + Lockers view, tap the **Lockers** tile.
2. In the **Lockers** view, tap the locker you wish to view items for and tap **View**. (Alternatively, you can tap **Open**.)
3. Type the PIN and then view the items.

Notes

WHAT CAN I DO HERE?

In your LightArrow app, notes can include audio, video, photos, drawings, and text. For new blocks of text, a timestamp is included or you can enter your own date and time for audio, video, drawings, or photos. You can create notes in many areas of your LightArrow app, but you primarily manage notes via the Notes + Files, Lists topic. Notes touchpoints are available for Financial Notes, Coupons, Travel Notes, and Education Notes. Consequently, you can add notes from each of these topics for finances, coupons, travel, and education and the respective category is added by default. This way, you can easily find notes for these topics through each of these topic's views.

Note: When using notes for coupons, you can take a photo of a paper coupon or associate a bookmark to an online coupon.

You can associate notes to several different types of items, such as assets, events, log items, products, projects, services, service provides, subjects, trips, and visitors. For example, you might want to associate class or meeting notes with an education project that was created for a class or training session.

If desired, you can sync your notes with Toodledo® and Evernote®, which are popular to-do and notes applications. When using these online services, only the text is synced and new text blocks cannot be added (you can edit your original text block). In addition, all text blocks are combined and then synced into one note in the online service. Before you sync, you must set up your accounts in Logins for Integrations.

Note: You can create notes in the following topics:

- **Finances**: Financial Notes tile.
- **Shopping + Gifts**: Coupons tile.
- **Travel + Places**: Travel Notes tile.
- **Education**: Education Notes tile.

You can also create notes in other topics, such as Tasks + Projects, by associating notes with objects such as projects.

How to create a note:

1. In the Notes + Files, Lists view (or touchpoint topic), tap the plus sign and select **Note**.
2. To quickly create a note, type a name and date, and then tap **Save**.
3. Optionally, tap **Full Details** and type a name for the note and add or select a notebook for the note.
4. If you wish to add a category to the note, tap the **Categories** tile.
5. If you wish to add a context tag, tap the **Context tags** tile.
6. Tap **Create and Add More Data** to add location, associated topics, and associated contacts.
7. To add text, tap **Text** and type your desired text. You can add bulleted lists by tapping the bullets icon. Tabbing is also available. Arrow icons allow you to move the cursor right and left.
8. To add Audio, tap the **Audio** button and choose **Select From Media Folder** or **Record Audio**.
9. To add Video, tap the **Video** button and choose **Select From Camera Roll**, **Select From Media Folder** or **Record Video**.
10. To add a Photo, tap the **Photo** button and choose **Select From Camera Roll**, **Select From Media Folder** or **Take Photo**.

11. To add a Drawing or hand-written text, tap **Drawing** and create a drawing.
12. **Note**: For easier note taking, you can view the note in full screen mode by tapping the Full Screen icon.
13. If you wish, you can associate other items by tapping the plus sign in the Associated Items section. Refer to Notes + Files, Lists for more information.

How to edit a note:

1. In the Notes + Files, Lists topic (or touchpoint topic), tap the **Notes** tile.
2. Tap a note and then tap **Open** or **View Fullscreen**.
3. Tap **Audio**, **Video**, **Photo**, or **Draw** to change the type of note you're editing.
4. To edit the text of the note, tap the text and then tap **Edit**.
5. To add an entry above the current text, tap **Insert Above**.
6. To add an entry below the current text, tap **Insert Below**.
7. To make a notation of the date and/or time you made the entry, tap **Journal Time**.
8. To reorder blocks of text, tap the reorder icon (three lines) and drag and drop the text block.

How to delete a note:

1. In the Notes + Files, Lists topic (or touchpoint topic), tap the **Notes** tile.
2. Tap a note and then tap **More**.
3. Choose **Delete**.

How to associate a note with an item:

1. In the Notes + Files, Lists topic (or touchpoint topic), tap the **Notes** tile.
2. Tap a note and then tap **More**.
3. Choose **Associate Topic** or **Associate Contact**.
4. Tap a topic or contact and then choose it.

SYNCING NOTES WITH TOODLEDO AND EVERNOTE

How to sync notes with Toodledo and Evernote:

1. Tap the **Notes** tile in the Notes + Files, Lists topic (or touchpoint topic).

2. Tap the note you wish to sync, tap **Sync**, and choose a service.
3. The note is synced with your selected service. With Evernote, it's synced to your default Evernote folder. For Toodledo, it's synced to your Note folder (which is the Root folder).
4. With Evernote, you can open the note directly in the external app by tapping the text.

PRINTING, SHARING, DISCUSSING, AND EXPORTING NOTES

You can print individual notes, share notes via email, discuss notes via social media or SMS, or export notes. Users who receive a note via email can manage it in their app.

How to print a note:

1. Tap the **Notes** tile in the Notes + Files, Lists topic (or touchpoint topic).
2. Tap the note you wish to print and tap **Open**.
3. Tap **Actions** and then tap **Print**.
4. A PDF file is created and an alert appears asking if you wish to save the document as a local document. If so, tap **Yes**, otherwise tap **No**.
5. Tap the Share icon at the top of the view and then tap **Print**.
6. Print the document to the selected printer.

Note: You can also open the PDF document and save it to an online service, such as Dropbox, by tapping the Share icon and choosing an online service.

How to share a note via email:

1. Tap the **Notes** tile in the Notes + Files, Lists topic (or touchpoint topic).
2. Tap the note you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient and then tap **Send** to send the email.

How to collaborate about a note:

1. Tap the **Notes** tile in the Notes + Files, Lists topic (or touchpoint topic).
2. Tap the note you wish to collaborate about and tap **Open**.
3. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.
4. A message displaying the title of the note appears.
5. Modify the message as desired and send it.

6. If you wish to view the replies at a later time, tap **View Replies**.

How to export a note to a CSV file (only associated tasks are exported):

1. Tap the **Notes** tile in the Notes + Files, Lists topic (or touchpoint topic).
2. Tap the note you wish to export and then tap **Export**.
3. Complete the email and tap **Send**. It contains the .csv file from the export.

Online Access

WHAT CAN I DO HERE?

In your LightArrow app, you can set up usernames and passwords so you can easily find this information when you're accessing a website for a service provider, such as a bank, or other type of object. Ensure that you've set up a PIN in your Settings before using online access.

Keep in mind; your data is always stored only on your device, unless you choose to use Cloud sync via Dropbox, Box, or other cloud services. In addition, your LightArrow secret data is secure with military grade 256-bit Advanced Encryption Standard (AES) encryption. The Advanced Encryption Standard (AES) is one of the most commonly used and secure encryption algorithms available today.

How to set up Online Access:

1. Tap the **Online Access** tile from the item's tile (e.g. a Service Provider, such as a Bank) you wish to set online access for.
2. Name the online access.
3. Type the URL directly or tap the Web icon to search for the website.
4. When the site is fully loaded or after you've entered the URL, tap **Save**.
5. Enter an optional comment.
6. Enter your username.
7. Enter your password.
8. Online Access is added as a category by default.
9. Optionally add context tags by tapping the **Context Tags** tile.
10. Tap **Save**.

How to view your Online Access credentials:

1. When you access the object that includes online access, tap the **Online Access** tile and then tap **View**.
2. Tap the Lock icon at the top of the view.
3. Enter your PIN.
4. The login name and password appears at the top.

Photos

WHAT CAN I DO HERE?

There are several areas in your LightArrow app where you can add photos in order to represent the item, such as products, events, or goals. In addition, you can associate photos with items, such as projects, when you wish to provide more information through screenshots or photos. For example, you might want to associate photos with an event, such as a birthday party or you might want to attach photos showing the progress of a landscaping project. Your LightArrow app also allows you to organize photos via albums. You can also keep private photos in lockers.

How to add photos to items:

When you add photos to items, such as products, events, or goals, the tiles that represent the items show your photos.

1. Locate the item to which you wish to add a photo.
2. Tap the item and then tap **Open**.
3. In the upper left, tap **Add Photo**.
4. Choose one of the options, such as Select from Camera Roll, Select from Media Folder, Use Default Image, or Take Photo.
5. Perform the action and then tap **Save**.

How to add a new unassociated photo:

1. Tap the Media topic in the My Topics view.
2. Tap the plus sign in the upper right of the Media view and tap **Photo** (or use Quick Add from the main view).
3. Take the photo.
4. The photo is saved.

5. This photo can be found by tapping the **Photos** tile in the Media view and then tapping **Photos not in Albums**.
6. You can view the photo after tapping it and then tapping **View**.

How to associate photos to LightArrow app items:

1. Access the object you wish to associate a photo with, such as a project, event, trip, etc.
2. Tap the plus sign in the Associated Items section.
3. Choose **Create New** or **Choose Existing**.
4. Choose **Photo** from the Quick Add panel.
5. From the Camera icon, tap **Select From Camera Roll** or **Select from Media Folder**.
6. Tap **Use Photo** or **Retake**.
7. After you use the photo, it's selected and placed into the Photos view and the photos become available for viewing in the Associated Items section for the project, event, trip, etc.

How to associate photos to LightArrow app items (from the photo):

1. Tap the Media topic in the My Topics view.
2. Tap the **Photos** tile.
3. Locate the photo in "Photos not in Album." Photos in albums cannot be associated with topic items.
4. Tap the photo and then tap **More**.
5. Choose **Associate topic**, tap a topic, and then choose an item from the list.

How to share photos:

1. Tap the Media topic in the My Topics view.
2. Tap the **Photos** tile.
3. Locate the photo in one of the albums or in "Photos not in Album."
4. Tap the photo and then tap **Share**.
5. Choose Email, Twitter, or Facebook and complete the sharing actions.

How to delete photos:

1. Tap the Media topic in the My Topics view.

2. Tap the **Photos** tile.
3. Locate the photo in one of the albums or in "Photos not in Album."
4. Tap the photo and then tap **Delete**.

For more information about photo albums, refer to Media.

Projects

WHAT CAN I DO HERE?

In your LightArrow app, you can create Education projects, Assignments, Media projects, Health projects, and general-purpose projects.

GLOSSARY OF TERMS

Health Project: A project for health-related items that you wish to accomplish. Dental health, training for a triathlon, and having your hip replaced are all examples of health projects. Health Projects take the category of "Health + Goals."

Education Project: A project for any education-related endeavor, such as "Home Schooling 2014," "Learn Piano," "Java Programming," etc. for the purpose of assigning tasks and holding reference material. Education projects take the category of "Education."

Assignment: A project for any education-related assignment that requires completion. Education Assignments take the category of "Assignment."

Media Project: Print-, audio-, photo-, or video--related work items that you wish to accomplish. Connecting your new surround sound system and researching your next stereo system purchase are both examples of media projects. Media Projects take the category of Media.

Project: A project is any individual or collaborative undertaking that is planned and designed to achieve a particular goal. Projects typically have tasks associated with them. An example of a project could be "Re-organize Kitchen" or "Re-build Website."

PROJECTS

The following describes how to create each type of project:

- **Health Projects**: In the Health + Goals topic, tap the **Health Projects** tile (iPad) or tap Multiple Touchpoints (iPhone/iPod touch), and then select Health Projects.

- **Education Projects**: In the Education topic, tap the **Education Projects** tile, and then select **Education Projects**.
- **Assignments**: In the Education topic, tap the **Subjects** tile, add a new Subject, and then tap the **Assignments** tile.
- **Media Projects**: In the Media topic, tap the **Media Projects** tile, and then tap the plus sign.
- **General-Purpose Projects**: In the Tasks + Projects view, tap the **Projects** tile or tap the plus sign and choose **Project**.

PROJECTS VIEW

In the Projects view, a list of all the projects that you created are listed, and you're able to create, modify, and edit projects. This includes all media, health, education, and general-purpose projects.

GROUPING PROJECTS IN THE PROJECTS VIEW

You can view all your projects in the Projects view by tapping the Projects tile in the Tasks + Projects topic. When you're viewing a list of projects in the Projects view, you can view the list in different ways. You can show all projects (ungrouped); view projects by category; view projects by context tag; or view projects by the last updated date. Additionally, you can create a project that already reflects the category or context tag that you've expanded in this view by tapping a category or context tag, and then tapping **Tap to add a New Project** below it.

To group projects:

1. In the Projects view tap the selector at the top-left of the view.
2. Select Ungrouped, Category, Context Tag, or Last Updated. The app remembers the previous selection.

NEW PROJECT VIEW / PROJECT VIEW

You can add, modify, and delete projects. You can also create categories for projects directly from these views.

How to create a new Project:

1. If you're creating a project from the **Projects** view, tap **Tap to add a New Project**.
2. To quickly create a project, type a name and start date, and then tap **Save**.

3. Optionally, tap **Full Details** (after typing a name for the project) and add an optional comment describing the project.
4. If you wish to add a thumbnail that represents the project, tap **Add Photo** and select or add a photo.
5. Tap the **Dates** tile to add start and end dates for the project, then tap **Set**.
6. Select or add a category by tapping the **Categories** tile.
7. Add others to the project if this is a group project by tapping **Participants**, tapping the add icon, tapping participant(s), tapping **Save**, and then tapping the back arrow.
8. Optionally add context tags to the project by tapping the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
9. If you wish to change the iOS calendar that the project is associated with, tap the **iOS Calendar** tile and then select **Specify iOS Calendar**.
10. If you wish to set iOS Notifications (local notifications) for the project, tap **Show iOS Notifications**. Refer to iOS Notifications for more information.
11. To add a location for the project, tap **Location** and select one of the options.
12. Add additional items, such as Tasks, Checklists, Expenses, etc. by tapping the plus sign at the bottom of the view. (See Tasks + Projects for information about associating items.)
13. Tap **Save**.

COMMUNICATING WITH PARTICIPANTS

When you create projects, it's easy to communicate with all the participants at the same time by following the procedure below:

1. Open the project by tapping the **Projects** tile, tapping the project, and then tapping **Open**.
2. Tap the **Participants** tile and tap the Email icon.
3. Tap **Email All**.
4. Write and send the email.

MODIFYING PROJECTS

How to modify a Project:

1. Tap the tile that contains your project in the topic of choice.
2. Tap the project you wish to modify and then tap **Open**.
3. Modify the items by tapping the tiles.
4. Tap **Save**.

DELETING PROJECTS

How to delete a project:

1. Tap the tile that contains your project in the topic of choice.
2. Tap the project you wish to delete to expand the row, and then tap **Delete**.

ADDING SUB-CATEGORIES FOR PROJECTS

You can add subcategories for projects directly from Manage Categories or you can add subcategories while you're in the process of adding projects as described below.

How to add a subcategory for a project:

1. In the Projects view, tap the project you wish to add a category for, and then tap **Open**.
2. Tap the **Categories** tile.
3. Expand a category, and then tap the plus sign to create a sub-category under any category you wish.
4. Tap **Tap to set name** and then type a name for the sub-category.
5. Optionally add a comment.
6. If you want to hide the category, change the switch to **Yes**. When a sub-category is hidden, it no longer appears in the Categories tile, but it remains defined, and is still available in the category list.
7. Tap **Save**.

SYNCING PROJECTS WITH ASANA

You can sync your LightArrow app projects and tasks to Asana. You must first provide access to Asana via Logins for Integrations.

How to sync projects and tasks with Asana:

1. In the Projects view, tap the project you wish to sync with Asana, and then tap **Open**.
2. Tap **Sync** and choose Asana.

3. Tap **Save**.
4. The project and tasks are synced.

SHARING AND DISCUSSING PROJECTS

You can share projects via email or discuss projects via social media or SMS. Users who receive a project via email can manage it in their app.

How to share a project via email:

1. Tap the **Projects** tile in the Tasks + Projects topic.
2. Tap the project you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient(s) and then tap **Send** to send the email. If you've set up participants for the project, they are selected by default.

How to collaborate about a project:

1. Tap the **Projects** tile in the Tasks + Projects topic.
2. Tap the project you wish to collaborate about and tap **Open**.
3. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.
4. A message displaying, "I'm working on a project (project name). Any recommendations?" appears.
5. Modify the message as desired and send it.
6. If you wish to view the replies at a later time, tap **View Replies**.

How to export a project to a CSV file (associated tasks are exported):

1. Tap the **Projects** tile in the Tasks + Projects, Lists topic.
2. Tap the project you wish to export and then tap **Export**.
3. Complete the email and tap **Send**. It contains the .csv file from the export. (Send the file to yourself.)

ASSOCIATING ITEMS WITH PROJECTS

Refer to Tasks + Projects to learn how to associate various app items to projects.

Reminders

WHAT CAN I DO HERE?

With your LightArrow app, you can create reminders when you wish to be reminded of something at a particular date and time. These reminders can be associated with your device's calendar, which is specified in My Settings. Through your device's calendar, you'll receive local notifications for these reminders. You can also set the timing for the reminder by choosing it from My Settings. Your LightArrow reminders should not be confused with iOS reminders, which are reminders that work with your iOS Reminders built-in app. You can learn more about iOS Reminders in Events + Appointments.

You can manage reminders in several areas of your LightArrow app. The following procedure describes how to create reminders via Quick Add.

How to create reminders:

1. From the **Quick Add** menu (bottom left of all main views), tap the plus sign.
2. Choose **Reminder**.
3. Add a name for the reminder and a time. If you wish to add context tags or change the iOS calendar, tap **Full Details**. Otherwise, tap **Save**.
4. Optionally, tap the **Context Tags** tile to add context tags.
5. Optionally associate the reminder with a topic in your app by tapping the **Associated Topic** tile, tapping **Associate**, and then choosing a topic.
6. Optionally, tap the **iOS Calendar** tile to change the iOS calendar associated with the reminder and choose **Specify iOS Calendar**. Choose the Calendar and tap **Set**.
7. Tap **Save**.

How to edit or delete reminders:

1. Locate the reminder in the LightArrow app general calendar, event calendar, or by searching for it.
2. To remove the reminder, tap the reminder and then tap **Delete** (it is also removed from your device's calendar).

3. You can also associate a contact or topic to the reminder by tapping **More** and then tapping **Associate Topic** or **Associate Contact** (and then selecting the contact or asset).
4. If you wish to make additional changes, tap **Open** to edit the reminder.
5. Optionally, tap the **Context Tags** tile to add context tags.
6. Optionally, tap the **iOS Calendar** tile to change the iOS calendar associated with the reminder and choose **Specify iOS Calendar**. Choose the Calendar and tap **Set**.
7. Optionally, tap the **Associated Topic** tile to associate the reminder with another item (tap **Associate**, tap the topic, and then tap the item).
8. Optionally, tap the **Associated Contact** tile to associate the reminder with another item (tap **Associate**, and then tap the contact).
9. Tap **Save**.

Repeat Schedules

WHAT CAN I DO HERE?

In your LightArrow app, you can set repeat schedules for appointments, tasks, and payments. LightArrow apps include a variety of options for repeat schedules, which are described below.

How to create a repeat schedule:

1. Open the item for which you wish to create a repeat schedule.
2. Tap (Task) **Tap to configure repeat schedule** OR (Appointment/ Payment) **Not set to repeat**.
3. From the **First Occurrence** field, select the first day you wish for the task, appointment, or payment to occur.
4. From the **Repeat Every** field, select days, weeks, months, or years and select a corresponding number. For example, if you want an appointment to occur every other month, select 2 and month. The options for custom schedules vary, depending on your selection.
5. If you chose **day**, a custom schedule is not available from the **Custom** field. If you choose **year**, a custom schedule is not available from the **Custom** field.

6. If you chose **week**, you can select specific days of the week after tapping the **Custom** field, by tapping the days that display on the Custom Month Schedule popup.
7. If you chose **month**, you can create a custom month schedule after tapping the **Custom** field by tapping specific days of the month. Optionally, you can also specify every first, second, third, fourth, or last day of the month (this option is available twice for more flexibility). These options are excellent for class schedules.
8. Choose **Number of Occurrences** or **Until End Date** for the recurring task or recurring appointment.
9. If you chose **Until End Date**, enter the end date in the **End Date** field.
10. **Tasks only**: If you don't want a task to be created until you finish the previous task, select **Automatically when needed** from the **Create** field. Otherwise, select **All Instances**.
11. If you wish to see a preview of the schedule, tap the preview schedule option at the bottom of the view.
12. Tap **Save**.

Service Payment Templates

WHAT CAN I DO HERE?

In your LightArrow app, you can set up payments that are due for services and other items. For example, if you have weekly housecleaning services, you can set up a service payment template with the payment details, and you can make it recurring, if necessary. If you've set up bank accounts, the new balance is reflected in the account after payments occur.

How to enter, add, and delete payments:

1. In the **Finances** view, tap **Payments**.
    - **Enter a Payment**: Tap a payment and then tap **Open** to enter a payment for it (described below).
    - **Create a New Payment**: Tap **Tap to add a New Payment** to create a new payment based on a template (described below).
    - **Remove a Payment**: Tap a payment and then tap **Delete** to remove a payment from the list of payments.

How to set up new Service Payment Templates:

1. Go to **Finances** topic -> **Service Payment Templates** tile -> plus sign.
2. Select the type of service by tapping the **Service** field, selecting the service, and then tapping **Save** (you can add a new service type by tapping the plus sign when the Select Service view appears). You cannot select service categories.
3. In the **Amount** field, type the amount of the payment.
4. Choose a payment type from the **Payment Type** field (Autopay, cash, check, credit/debit, etc.) or set up a new payment type by tapping **New**.
5. Choose an account from the **Paid By** field.
6. If you wish to add repeating payments or view a payment schedule, tap **Create and Add More Data**.
7. Tap Not Set To Repeat to set up a recurring schedule of payments (and then tap **Save**).
8. Tap **Payments** to view or modify the actual payments (described below).

How to set up an "Other Payment Template"

"Other Payment Templates" are suitable for payments to a chosen recipient from your contacts.

1. Go to **Finances** topic -> **Other Payment Templates** tile -> plus sign.
2. Choose the recipient by tapping the **Recipient** field and tapping a contact. Tap **Save**.
3. Type an amount for the payment in the **Amount** field.
4. Choose a payment type from the **Payment Type** field (Autopay, cash, check, credit/debit, etc.) or set up a new payment type by tapping **New**.
5. Choose an account from the **Paid By** field.
6. If you wish to add repeating payments or view a payment schedule, tap **Create and Add More Data**.
7. Tap Not Set To Repeat to set up a recurring schedule of payments.
8. Tap **Payments** to view or modify the actual payments (described below).

How to add a new payment:

1. In the Finances view, tap the plus sign and then tap **Bill**.

2. In the Payment view, choose a payment template from the **Template** field (or create a new one by tapping **New**).
3. Enter an amount from the **Amount** field.
4. Choose a due date from the **Due Date** field.
5. Select the actual "paid on" date from the **Paid On** field.
6. Enter or modify the payment amount. If you pay a partial payment, the balance is reflected in the Service Payment Template view. (This makes a record of the transaction.)
7. Enter the actual payment type in the **Payment Type** field.
8. Enter the actual source from the **Source** field.
9. Tap **Save**.

How to modify a payment that you've paid:

1. In the Finances view, tap a payment and then tap **Open** to enter a payment for it.
2. Modify the amount for the payment if you wish in the **Amount** field.
3. Enter a due date in the **Due Date** field.
4. Select the actual paid on date from the **Paid On** field.
5. If you've paid a partial payment, enter it in the **Paid Amount** field.
6. Select a payment type from the **Payment Type** field (or select **New** to create a new payment type).
7. Select the source (account) for the payment from the **Source** field.

How to delete service payment or "other payment" templates:

1. In the Finances topic, tap the **Service Payment Templates** tile or the **Other Payment Templates** tile.
2. Tap a payment to expand it, and then tap **Delete**.

GROUPING PAYMENTS

How to group payments:

There is one selector at the top-left of the Payments view. It allows you to view payments ungrouped, or by Due Date, Paid Date, Last Updated, Paid By, or Service.

1. In the Finances view, tap the Payments tile.

2. From the selector, choose **Ungrouped**, **Due Date**, **Paid Date**, **Last Updated**, **Paid By**, or **Service**. The app remembers the previous selection.

Service Providers

WHAT CAN I DO HERE?

In your LightArrow app, you can manage Service Providers, which are companies, organizations, or individuals from whom you receive a service. For example, AT&T may be the company that provides your mobile telephone service. Or, State Farm insures your car, you stream movies from Netflix, or Dr. Welby is your personal physician. For service providers, you can manage information such as location, online access (bookmarks/usernames/passwords), referred by, context tags, and categories.

You can create service providers in several areas of your LightArrow app including:

- **Health + Goals** topic: tap the **Healthcare Providers** tile (iPad) or tap **Multiple Touchpoints** (iPhone/iPod touch), select **Health Providers**, and tap the plus sign.
- **People + Services** topic: tap the plus sign, and then tap **Service Provider**.
- **Shopping + Gifts** topic: tap **Sellers** and then tap **Tap to add a New Seller**.
- **Finances** topic: tap **Banks** and then tap **Tap to add a New Service Provider**.
- **Travel + Places**: tap **Places** and then tap **Tap to add a New Service Provider**.
- In topics that include Services, create service providers directly from the Service Provider tile (from the Service).

SERVICE PROVIDERS VIEW

Your LightArrow app includes common service providers, which you can modify or remove. A method for sorting the providers is included in the upper-left of the view (sort by all, category, last updated, context tags, or ratings). You can manage these service providers in the Service Providers view, which is available from these areas of the app:

- **Health + Goals** topic: **Healthcare Providers** tile
- **People + Services**: **Service Provider** tile.
- **Shopping + Gifts**: **Sellers** tile.
- **Finances** topic: **Banks** tile.
- **Travel + Places**: **Places** tile.

CREATING SERVICE PROVIDERS

How to add service providers:

You can add new service providers by following the procedure below:

1. Go to the areas in the app that are listed above.
2. Tap the plus sign.
3. Add a name for the Service Provider.
4. Tap **Save** or tap **Full Details** to add more information.
5. Optionally add a rating for the Service Provider by tapping the stars.
6. Optionally add a comment for the Service Provider.
7. Tap the **Contact**, **Location**, **Online Access**, **Referred By**, **Context Tags**, and **Categories** tiles (in some cases, the category is added by default) to add related information.
8. Optionally associate tasks, appointments, reminders, notes, checklists file references, bookmarks, services, or media items by tapping the plus sign.
9. Tap **Save**.

How to modify service providers:

1. Locate the Service Provider you wish to change, and tap **Open**.
2. Tap the tile for the item you wish to modify (**Contact**, **Location**, **Online Access**, **Referred By**, **Context Tags**, and **Categories** tiles).
3. Complete the information as directed.
4. Tap **Save**.

How to delete service providers:

You can delete service providers by following the procedure below:

1. Locate the service provider you wish to delete and tap it.
2. Tap **Delete**.

ASSOCIATING ITEMS WITH SERVICE PROVIDERS

Refer to People + Services to learn about associating items, such as tasks, appointments, etc. with service providers.

Services

WHAT CAN I DO HERE?

In your LightArrow app, you can manage Services, which are products or labor you receive from companies, organizations, or individuals. Household utilities, yoga instruction, lawn care, and newspaper subscriptions are all examples of services. You can sort the list of services by tapping the **Services** tile. This view shows you, at-a-glance, all the services that are defined. Preset services are initially shown that you're welcome to edit or remove. If you have created services, each of those and all the preset services are listed, sorted alphabetically by default. You can decide how the services are viewed (such as by Category, Last Updated, etc.) by using the menu in the upper left.

You can view and create services in many areas of your LightArrow app, including:

- **Travel + Places**: Tap the **Travel Services** tile and then tap the plus sign.
- **People + Services**: Tap the **Services** tile and then tap the plus sign.
- **Health + Goals**: Tap the **Health Services** tile (iPad) or tap **Multiple Touchpoints** (iPhone/iPod touch), and then tap **Health Services**.
- **Home + Assets**: Tap the **Home + Assets Services** tile and then tap the plus sign.
- **Media**: Tap the **Media Services** tile and then tap the plus sign.

SERVICES VIEW

Your LightArrow app includes common services, which you can modify or remove. A method for sorting the services is included in the upper-left of the view (sort by all, category, starts, last updated, context tags, or associations). You can manage these services in the Services view, which is available from these areas of the app:

- **Travel + Places**: **Travel Services** tile.
- **People + Services**: **Services** tile.

- **Health + Goals**: Tap the **Health Services** tile (iPad) or tap **Multiple Touchpoints** (iPhone/iPod touch), and then tap **Health Services**.
- **Home + Assets**: **Home + Assets Services** tile
- **Media**: **Media Services** tile

MANAGING SERVICES

How to add services:

Your LightArrow app includes common services, such as home insurance, etc., which you can modify or remove. You can add new services by following the procedure below:

1. In the People + Services topic, tap the plus sign and then choose **Service**.
2. Add a name for a service and the date and click **Save**.
3. Optionally, Tap **Full Details** to add all the details, such as the start and end date, the provider, context tags, payment, online access, and associated topics. In some cases, the category is added by default.
4. Tap **Save**.

How to modify services:

1. Locate the service you wish to change, and tap **Open**.
2. Tap the tile for the item you wish to modify (Date, Service Provider, Categories, Context Tags, Associated Topic, Payment, or Online Access).
3. Complete the information as directed.
4. Tap **Save**.

How to delete services:

1. Locate the service you wish to delete and tap it.
2. Tap **Delete**.

If you wish to associate items (such as tasks, appointments, reminders, etc.) with services, refer to People + Services.

Video

WHAT CAN I DO HERE?

In your LightArrow app, you can associate videos with items, such as projects, when you wish to provide more information through videos. For example, you might want to associate videos with an event, such as a birthday party or you might want to attach videos showing the progress of a landscaping project. Your LightArrow app also allows you to organize videos via albums.

How to add a new unassociated video:

1. Tap the Media topic in the My Topics view (or use Quick Add from the main view).
2. Tap the plus sign in the upper right of the Media view and tap **Video**.
3. Tap the recording button to start recording and then tap it again to stop.
4. The clip is saved.
5. This video clip can be found by tapping the **Videos** tile in the Media view and then tapping **Videos not in Albums**.
6. You can also play the video after opening it.

How to associate videos to LightArrow app items:

1. Access the object you wish to associate a video with, such as a project, event, trip, etc.
2. Tap the plus sign in the Associated Items section.
3. Choose **Create New** or **Choose Existing**.
4. Choose **Video**.
5. From the Camera icon, tap **Select From Camera Roll** or **Select from Media Folder**.
6. The video is selected and placed into the Videos view and the videos become available for viewing in the Associated Items section for the project, event, trip, etc.

How to associate videos to LightArrow app items (from the video):

1. Tap the Media topic in the My Topics view.
2. Tap the **Videos** tile.
3. Locate the video in "Videos not in Album." Videos in albums cannot be associated with topic items.
4. Tap the video and then tap **More**.
5. Choose **Associate topic**, tap a topic, and then choose an item from the list.

How to share videos:

1. Tap the Media topic in the My Topics view.
2. Tap the **Videos** tile.
3. Locate the video in one of the albums or in "Videos not in Album."
4. Tap the video and then tap **Share**.
5. Choose Email, Twitter, or Facebook and complete the sharing actions.

How to delete videos:

1. Tap the Media topic in the My Topics view.
2. Tap the **Videos** tile.
3. Locate the video in one of the albums or in "Videos not in Album."
4. Tap the video and then tap **Delete**.

For more information about video albums, refer to Media.

Dashboard

The following sections describe the views accessed from the dashboard.

Home (Agenda View)

WHAT CAN I DO HERE?

The Agenda view or Home view provides an overview or outline of the things that you need to accomplish today, tomorrow, and the next seven days in a convenient list view. This view keeps all your important things top of mind and provides easy access for managing these items. This is the view that you would typically look at first thing in the morning and throughout the day. Take note that the items that display on your Agenda are configurable through the filter. From your Agenda, you can create to-do lists (checklists) and most other LightArrow app items on the fly.

GLOSSARY OF TERMS

Filters: The filter examines the calendars and types of items that you request to show on the Agenda view, and then presents qualifying types of items in the Agenda view.

Hot List: The ability to add your favorite and most-commonly used views and items to the "Hot List" view for easy access. This saves you time in navigating to a frequently-used view, which might be buried inside different topics.

Quick Add: The ability to quickly add a variety of different types of items directly from the Agenda view or Quick Menu.

Quick Log: The ability to quickly log a variety of different metrics directly from the Agenda view or Quick Menu.

FILTERS

The filter icon at the top-right of the Agenda view enables configuration of the items you wish to show or hide in this view. If you are seeing items that you don't want to see or if you want to see items you believe are missing, this is the first place you should check. For example, if you're not seeing events from your calendars (such as Google calendars) or LightArrow app items, tap the filter icon to see what's filtered out from the view.

Tapping the checkboxes enable or disable the viewing of the items that are listed. You can show the calendars you wish to view events from (such as iCloud,

Exchange, Google, Yahoo, Aol., or Outlook.com) and you can choose whether or not to show iOS reminders. You can also choose the types of LightArrow app items you wish to hide or show, such as closed items, appointments, bill payments, events, expenses, notes with date tag, occasion reminders, projects, quick inbox items, checklists, reminders, shopping items, shopping lists, tasks, trips, visits, health stats, medication, nutrition stats, activity, or wellness stats.

ALERTS AND AGENDA CHECKLISTS SECTION

In this section, you can

- View overdue and undated items.
- Create or add most items available in your LightArrow app, such as tasks, shopping lists, notes, etc. via **Quick Add**.
- Quickly log an item, such as activity or medication via **Quick Log**.
- View, add, and modify checklists/to-lists.

OVERDUE AND UNDATED ITEMS

The **Overdue** and **Undated** tiles alert you to anything that needs your attention. Alerts occur for items that are due within the next five days or are currently overdue. You can tap any of the tiles to access these items and modify them. For example, alerts include:

- Overdue tasks.
- Incomplete shopping lists for which due dates have passed.
- Unpaid bills for which due date has passed.
- All open items that do not have a date associated.

How to manage overdue items:

1. In the Alerts & Agenda Checklists section of the Agenda view, tap the **Overdue** tile.
2. The Overdue view appears, which allows you to manage any of the items that are listed.
3. After tapping an item to expand it, you can selection any of the options that are available for the selected item to manage it.

Note: Through My Settings, you can change the behavior of overdue items. You can choose whether overdue items include only overdue items, items due later today, or to exclude items due today.

How to manage undated items:

1. In the Alerts & Agenda Checklists section of the Agenda view, tap the **Undated** tile. This tile provides access into any task, shopping item, or iOS reminder that you haven't set a date for.
2. The Undated Open Items view appears, which allows you to manage any of the items that are listed. It is divided among, Tasks, Shopping, and iOS Reminders. Tap any of these options (**Tasks**, **Shopping**, **iOS Reminders**) to see a grouping of these items.
3. After tapping an item to expand it, you can select any of the options that are available for the chosen item to manage it.

QUICK ADD AND QUICK LOG

How to access Quick Add:

The Quick Add menu enables you to add several types of items in your LightArrow app. You can access Quick Add from many areas of the Agenda view, including:

- The plus sign in the Alerts & Agenda Checklists section.
- The plus sign in the Agenda Items section.
- The Quick Menu at the bottom-left of the screen.

Note: The selections vary depending upon the menu that you use. For example, if you're adding items via the plus sign from the Agenda view, items that you would not typically include on your agenda or calendar are not offered for selection.

To use Quick Add:

1. Use one of the methods above to access Quick Add.
2. Tap **Quick Add**.
3. Choose the type of item you wish to add.
4. Refer to the following sections for more information:

- Tasks-Tasks + Projects
- Projects-Tasks + Projects
- Shopping Items-Shopping + Gifts
- Appointments-Events + Appointments
- Reminders-Events + Appointments
- Hosting Events-Events + Appointments

- Attending Events-Events + Appointments
- Occasion Reminders-Events + Appointments
- iOS Calendar Items-Events + Appointments
- iOS Reminders-Events + Appointments
- Notes-Notes + Files, Lists
- Checklists-Notes + Files, Lists
- Files-Notes + Files, Lists
- Bookmarks-Bookmarks + Lockers
- Lockers-Bookmarks + Lockers
- Expenses-Finances
- Assets-Home + Assets
- Expenses-Finances
- Bills-Finances
- Trips-Travel + Places
- Visitors-Travel + Places
- Contacts-Contacts
- Service Providers-People + Services
- Attending Events-Events + Appointments
- Trips-Travel + Places
- Visitors-Events + Appointments
- Contacts-People + Services
- Service Providers-People + Services
- Audio-Events + Appointments
- Drawings-Notes + Files, Lists
- Bills-Finances
- Inbox Items-My Inboxes

Note: If you access Quick Add from the Quick Menu, different options are available. The additional items are items that normally don't include due dates; therefore, typically you don't add them to your Agenda.

How to use Quick Log:

Use Quick Log to quickly log items such as your activity, nutrition, health stats, and wellness.

1. Tap the plus sign at the top of the Agenda view.
2. Tap **Quick Log**.
3. Choose the type of item you wish to add.
4. Refer to Health + Goals for more information.

CHECKLISTS

Refer to Checklists to learn about creating checklists.

TODAY, TOMORROW, AND THE NEXT 7 DAYS (AGENDA ITEMS SECTIONS)

Items with the dates designated for the current day, the following day, and the next seven days appear in these sections. This includes items such as checklists, appointments, bill payments, events, expenses, notes with date tag, occasion reminders, projects, quick inbox items, checklists, reminders, shopping items, shopping lists, tasks, trips, visits, health stats, medication, nutrition stats, activity, or wellness stats. However, you can filter these items as desired. All of the items in this section can be modified via the expanding cell. In addition, items can be added to the Hot List or converted to a different type of item.

How to set status and due date of a task in the Agenda view:

You can set the status of a task or change the due date of a task directly from the Agenda view in a few simple taps.

1. In the Agenda view, locate the task you wish to set status for.
2. When the cell expands, tap **Status** or **Due**.
3. If you're setting a due date, tap **Due** and then tap the desired due date.
4. If you're setting the status, tap **Status** and then tap **On Hold**, **In Progress**, **Completed**, or **Canceled**.

How to convert an item to a different type of item:

Many types of items can be converted to different types of items. For example, an iOS reminder to buy milk can be converted to a shopping item.

1. In the Agenda view, locate the item you wish to convert.
2. When the cell expands, tap **Convert**.
3. The app presents the types of items the item can be converted to.
4. Tap the item you wish to convert it to and then complete the fields.

5. Tap **Save**.

Hot List

WHAT CAN I DO HERE?

Your Hot List contains your "Favorites." It displays your most commonly-used categories and items allowing you to quickly access them. Using the Hot List saves you time in navigating to frequently-used items or categories. For example, if you've created a Log Form for logging activities related to Triathlon training, you could add this form directly to the Hot List so you can quickly access it every time you complete a new training item, such as a run, biking session, or swimming session. You can access the Hot List from the left navigational pane of the main view by tapping **Hot List**.

How to add items to the Hot List throughout your LightArrow app:

1. If you wish to add an individual item to your Hot List, tap the item you wish to add to a Hot List from any list view.
2. When the cell expands, tap **Hot List**.

How to add categories to the Hot List throughout your LightArrow app:

1. If you wish to add categories to your Hot List (such as Health Projects), locate a category by tapping its tile.
2. Tap the star at the top of the view.

How to add items to the Hot List in the Hot List view:

1. In the Hot List view, tap the plus sign.
2. Locate the type of item you wish to add and drill down to locate it or type the text in the search bar.

How to reorder items in the Hot List:

1. In the Hot List view, tap the Reorder icon (three lines).
2. Locate the type of item you wish to move and drag it to the new location by tapping and holding on the Reorder icon.
3. Tap **Done**.

How to remove items from the Hot List throughout your LightArrow app:

1. If you wish to remove an individual item from your Hot List, tap the item you wish to remove from a Hot List from any list view.

2. When the cell expands, tap **Remove from Hot List**.

How to remove categories from the Hot List throughout your LightArrow app:

1. If you wish to remove categories from your Hot List (such as Health Projects), locate a category by tapping its tile.
2. Tap the star at the top of the view.

How to remove items from the Hot List from the Hot List view:

- Swipe to clear items from the Hot List (or)
- Tap the cell to expand it, and then tap **Remove from Hot List**.

My Calendar

WHAT CAN I DO HERE?

At LightArrow, we understand that your calendar is one of the most important tools that you use for daily life. That's why we provide you with easy-to-read and user-friendly views for your calendar. Our apps provide you with a variety of views including Day, Week, Month, and Year. Furthermore, you can choose the calendars (Google, Yahoo, Outlook, etc.) and items (Appointment, tasks, etc.) you wish to view on your calendar by tapping the filter icon in the upper right of the calendar. LightArrow apps allow you to add a variety of different types of items including appointments, audio items, bill payments, drawing items, events, expenses, notes with tags, occasion reminders, photo items, projects, quick inbox items, checklists, reminders, shopping items, shopping lists, tasks, trips, video items, visits, health stats, medication, nutrition items, activity, wellness items, and more. This variety gives you an advantage over traditional calendars that only include events.

GLOSSARY OF TERMS

Filters: The filter examines the calendars and types of items that you request to show on calendars, and then presents qualifying types of items on your calendar views.

Quick Add: The ability to quickly add a variety of different types of items directly from the Calendar or Quick Menu.

Quick Log: The ability to quickly log a variety of different metrics directly from the Calendar or Quick Menu.

EXTERNAL CALENDAR SUPPORT

LightArrow apps interact with all your external calendars via the iOS calendar (the calendar that comes with your iPhone or iPad). Consequently, LightArrow apps can work with the calendars that the iOS calendar supports. For example, if you want to view events from your Google Calendar, then you must add your Google account to the **Mail, Contacts, Calendars** section of your iOS device's settings, and give the iOS calendar access to it. When you first download your LightArrow app, it will ask you if you want to grant access to your iOS calendar. If you initially deny access, you won't be able to see or interact with events from your iOS calendar or any other calendar that you've granted access to your iOS calendar; however, you can change this option, as described below.

How to grant your LightArrow app access to your iOS calendar:

1. If using iOS 7, go to your device's settings.
2. Tap **Privacy** and then tap **Calendars**.
3. Move the switch for your LightArrow app to the ON position.

FILTERS

The filter icon at the top-right of the Calendar enables configuration of the items you wish to show or hide in this view. Tapping the checkboxes enable or disable the viewing of the items that are listed. You can show the calendars you wish to view events from (such as iCloud, Exchange, Google, Yahoo, Aol., or Outlook.com) and you can choose whether or not to show iOS reminders. You can also choose the types of LightArrow app items you wish to display, such as closed items (completed tasks, etc.), appointments, audio items, bill payments, drawing items, events, expenses, notes with tags, occasion reminders, photo items, projects, quick inbox items, checklists, reminders, shopping items, shopping lists, tasks, trips, video items, visits, health stats, medication, nutrition, activity, and wellness.

Important: If you're not seeing events from your calendars (such as Google calendars) or LightArrow app items, tap the filter icon to see what's filtered out from the calendar.

IOS CALENDAR REMINDERS

You can choose which calendar your LightArrow app uses as your default calendar if you have multiple calendars. For example, you can choose from your iOS calendars, Google Calendar, Yahoo Calendar, etc. This is the calendar that your LightArrow app will add items to, if desired. You can control this via LightArrow app settings.

You can choose whether or not your LightArrow app items (tasks, projects, events, occasions, shopping lists, trips + visitors, bills, and other calendar items) are displayed on your built-in iOS calendar, and you can also choose when you would like to be notified by your device. Each item can be managed individually; for example you can be notified 30 minutes before each appointment and seven days before bills are due.

We suggest that you show the items on your iOS calendar so you can take advantage of your device's alarms and notifications. In the Settings view, the app provides you with a variety of ways to manage the alarms for your items. For example, these notifications include options from "No calendar entry" to "Remind 60 days before." Refer to your Settings help for more information.

DAY VIEW

The Day view includes a detailed list view for the day. It shows you your appointments and tasks, workouts, projects, events, etc. – depending on what you're managing for a given day, and they're color-coded for your convenience. If you're using multiple calendars, the events are color coded by calendar. Tapping the appointment accesses the event's details. You can manage your items directly through this view.

WEEK VIEW

The Week view gives you a good overview of the items that you've scheduled for the week. It shows you your appointments and tasks, workouts, projects, events, etc. – depending on what you're managing, and they're color-coded for your convenience. Items from external calendars are also color-coded based on their calendar. Managing the items is easy – just a tap away.

MONTH VIEW

The Month view includes detailed list views and a calendar for the month. It shows you a list of your appointments and tasks, workouts, projects, events, etc. – depending on what you're managing, and they're color-coded for your convenience. Items from external calendars are also color-coded based on their calendar. You can easily choose the day you want to view by tapping the date on the calendar. There's an indicator on each day to show you if items are scheduled on those days. You can also completely manage those items by tapping them.

YEAR VIEW

The Year view allows you to scroll through a list of all your appointments and other items in one view for the entire year. It shows you a list of your appointments and tasks, workouts, projects, events, etc. – depending on

what you're managing, and they're color-coded for your convenience. You can also access past years' items. You can manage your items directly from this view.

USING QUICK ADD AND QUICK LOG

The Quick Add menu enables you to add several types of items in your LightArrow app. You can access Quick Add from different areas of the Calendar view, including:

- The plus sign in the top-right of the screen.
- The Quick Menu at the bottom-left of the screen.

To use Quick Add:

1. Tap the plus sign at the top of the Calendar view.
2. Tap **Quick Add**.
3. Choose the type of item you wish to add.
4. Refer to the following sections for more information:

Tasks	Tasks + Projects
Checklists	Notes + Files, Lists
Shopping Lists	Shopping + Gifts
Note	Notes + Files, Lists
Appointment	Events + Appointments
Reminder	Events + Appointments
Expense	Finances
Project	Tasks + Projects
Hosting Event	Events + Appointments
Attending Event	Events + Appointments
Trip	Travel + Places
Visitor	Events + Appointments
Occasion Reminder	Events + Appointments
Bill	Finances

iOS Calendar Item	Events + Appointments
iOS Reminder	Events + Appointments
Inbox Item	My Inboxes

Note: If you access Quick Add from the Quick Menu, more options are available. The additional items are items that normally don't include due dates; therefore, typically you don't add them to your calendar.

How to use Quick Log:

Use Quick Log to quickly log items such as your activity, nutrition, health stats, and wellness.

1. Tap the plus sign at the top of the Calendar view.
2. Tap **Quick Log**.
3. Choose the type of item you wish to add.
4. Refer to Health + Goals for more information.

How to navigate through Days, Weeks, Months, and Years:

- In the Day view, use the arrow keys to navigate to the previous or next day.
- In the Week view, use the arrow keys to navigate to the previous or next week.
- In the Month view, use the arrow keys to navigate to the previous or next month.
- In the Year view, use the arrow keys to navigate to the previous or next year.
- To go to the current day, tap **Today**.

All Associated Items

WHAT CAN I DO HERE?

In your LightArrow app, many items can be associated with other items. The All Associated Items view allows you to view and manage items associated with a selected object. Depending upon the type of item, you're able to view the list of items in different ways by tapping the icons in the upper left which allow sorting.

For example, if you're viewing all of the associated tasks for a project, you can choose to view the tasks by type, due date, or recently updated. You can also manage the items by tapping them and using the icons that are available from the expanding cell.

Recently Updated

WHAT CAN I DO HERE?

The Recent view in your LightArrow app shows all the items that you have recently added or modified. This view makes it convenient to find recently-updated items. You can modify any item from this view by tapping it and then tapping **Open**. By default, it shows you items that you have managed in the last seven days. You can find the Recent view by tapping **Recent** in the left pane of the main view.

How to change the number of days that the Recent view shows:

1. In the Recent view, tap the **Filter** icon in the top corner.
2. Select the number of days you wish to go back from **Show Last** under the **TIME SETTING**.
3. Tap **Done**.

Near Me

WHAT CAN I DO HERE?

The Near Me view gives you one-tap access to a view of your LightArrow app items that are in the vicinity of your current location. To access the Near Me view, tap **Near Me** in the left pane of the main view. In other words, if you set a location for assets, appointments, audio, contacts, events, notes, photos, shopping items, service providers, tasks, trips, or video you can view these items on the map in the Near Me view, which helps you plan your day -- especially if you're running errands or visiting clients. In addition, the Near Me view is powered by foursquare®, which allows you to search for arts & entertainment, events, food, shops, and other types of businesses near you. If these businesses are businesses that you frequently use, you can convert them to Places, Sellers, Banks, or Service Providers in your LightArrow app directly from the Near Me view.

Note: The Near Me feature requires that you enable Location Services on your device. To enable Location Services on your device, go to your device Settings and tap **Location Services** (within Privacy), then set Location Services to On. If your LightArrow app appears in the list of applications provided, make sure it is set to On. If your LightArrow app does not appear in the list of applications provided, then the first time you try to set the location for an object in your LightArrow app, you will be asked if you want to allow the app to be able to use your current location -- you must grant this request in order to have access to the Near Me features.

Foursquare: This application uses the foursquare® application programming interface but is not endorsed or certified by Foursquare Labs, Inc. All of the foursquare® logos (including all badges) and trademarks displayed on this application are the property of Foursquare Labs, Inc.

Note: The accuracy of the geolocation capability of your device depends on many factors. Its determination of your current location may not be precise.

GLOSSARY OF TERMS

Location Services: Location Services allows our app to use information from cellular and WIFI to determine your approximate location. and the location of other entities.

USING THE NEAR ME VIEW

How do change the distance or measurement mode of the Near Me view:

By default, the Near Me view shows items within a radius of 5 miles of your current location.

1. Tap the distance selector at the top of the view.
2. Choose miles or kilometers, and then choose the number that you prefer (your app remembers this setting).
3. Tap **Set**.

How to change the center point of the map:

Sometimes you might be planning trips or other items outside of your current area and you want to see the scheduled items on a map.

1. Zoom out on the map by pinching inward, find the location, and then zoom back in.
2. Tap and hold the area you wish to pinpoint.

3. When you return to the map from a different area of the app, the map returns to your current location.

How to set location for an item:

Tapping the location tile for items (assets, appointments, contacts, events, notes, shopping items, service providers, tasks, trips, or audio) allows you to set a location. The Location icon allows you to set a location for photos and videos (located at the bottom of the screen when you open a photo or video). Past events and appointments do not appear in the Near Me view; events and appointments only appear in the Near Me view if their start or end date is now or in the future.

1. Open the item you wish to set a location for.
2. Tap the Location icon or the Location tile for an item.
3. Choose one of the following:
    - **Full Address**: Allows you to type a full address for the item.
    - **Set Location to "Here"**: Sets the location to the nearest location.
    - **Specify/Show on Map**: Searches for the location and chooses it or sets it to a typed position.
    - **Clear Location**: Removes the location.
    - **Show Nearby**: Shows the Near Me view so you can view items near to this location.
4. Tap **Save** to save the item.

How to filter the items that the Near Me view displays:

You can choose whether or not to display assets, appointments, audio, contacts, events, notes, photos, shopping items, service providers, tasks, trips, or video (that have location set) in the Near Me view.

1. In the Near Me view, tap the Selector at the right-top of the screen.
2. Choose **My Items** if it's not already selected.
3. Tap to check the items you wish to display in the Near Me view (your app remembers this setting).
4. Tap **View**.

How to find businesses or other items near you:

1. In the Near Me view, tap the Selector at the right-top of the screen.

2. Tap a category, such as Arts & Entertainment, College & Education, Event, Food, or Shops.
3. The app displays the selected items.

How to convert businesses found from foursquare® to places, sellers, banks, and service providers:

1. In the Near Me view, tap the Selector at the right-top of the screen.
2. Tap a category, such as Arts & Entertainment, College & Education, Event, Food, or Shops.
3. The app displays the selected items.
4. Tap the item you wish to convert and tap **Convert**.
5. Select **Place**, **Seller**, **Bank**, or **Service Provider**.

How to manage items in the Near Me view:

1. In the Near Me view, locate the item you wish to manage. The choices vary depending on the item.
2. Tap **Open** and change the data as needed.

How to interact with people from the Near Me view:

1. In the Near Me view, locate the person you wish to communicate with.
2. Tap **Call**, **Email**, **or Text** and complete the communication.

My Topics

In your LightArrow app, the My Topics view is the window into the 12 Life Topics, which allows you to manage almost everything in your life and business. Tapping the tiles in the 12 life topics view accesses the associated topic shown below. You can show, hide or reorder the topics by using the Filter icon at the top of the view.

THE 12 TOPICS

- Tasks + Projects
- Shopping + Gifts
- Events + Appointments
- Travel + Places
- People + Services

- Health + Goals
- Finances
- Home + Assets
- Education
- Notes + Files, Lists
- Media
- Bookmarks + Lockers

How to show or hide topics:

1. In the My Topics view, tap the **Filter** icon in the upper right.
2. Change the switch to **Hide** to hide the topics you don't wish to see.
3. Tap **Done**.

How to reorder the topics:

1. In the My Topics view, tap the **Filter** icon in the upper right.
2. Tap the **Reorder** icon (three lines) and hold it down, then move the topic to the location you wish.
3. Tap **Done**.

Engage

WHAT CAN I DO HERE?

If you have questions about your LightArrow app or if you wish to learn more about productivity, you can find information via the Engage view. The Engage view allows you to:

- Engage with LightArrow with feature requests, questions, and other issues and comments
- Access the Help Center
- Share the app with friends via social media or email
- Rate the app
- Read the LightArrow blog
- Learn from video tutorials
- Read known issues

Tip: If you wish to clear an item that is listed, SWIPE it to clear it.

CONTACT SUPPORT

We highly encourage you to reach out with any questions or suggestions. We respond to every submission. You can contact our support team directly from the app via Twitter, Email or the Web.

1. In the Engage view, tap an icon (Twitter, Email or Web) under **Talk to us**.
2. Complete the appropriate form.

ACCESS THE HELP CENTER

The Help Center gives you access to the main help for your app. From any help topic, tap **Help Center** at the bottom of the Help window and then tap **"App's Name" Help**.

TELL YOUR FRIENDS

If you are happy with your app and where we are going, please tell your friends. We would highly appreciate it.

1. In the Engage view, tap an icon (Facebook, Twitter or Email) under **Tell your friends**.
2. Complete the appropriate form.

RATE YOUR APP

If you are happy with your app and where we are going, please rate your app. We would highly appreciate it.

How to rate the app:

1. In the Engage view, tap **Please tap to rate our app.**
2. When the App Store window appears, tap **Reviews**.
3. Tap **Write a Review**.
4. Enter your iTunes password (we don't see it).
5. Tap the Star level you wish to use.
6. Type a title and a review.
7. Tap **Send**.
8. After you rate the app, bonus colors are enabled and can be selected in My Settings.

Settings

WHAT CAN I DO HERE?

In the Setting view, you can customize your LightArrow app to optimize the way you manage the information in your life. You can perform the following from the Settings view:

- **My Settings**: In this view, you can set colors; enable AirAccess; set maximum occurrences for repeat schedules; position new note items; position new checklist items; set your default search URL; set your Default Dashboard view; enable or disable deletion of quick inbox items after conversion; set whether or not items that are due later in the same day are overdue; set your default iOS calendar, and set the specifications for iOS calendar reminders.
- **Backup, Restore & Sync**: In this view, you can backup all your LightArrow data to an online file service and overwrite all your LightArrow data with the data from a previous full online backup. You can also set up sync for syncing data across iOS devices.
- **Secure Your Data**: In this view, you can set up a passcode lock to secure your data.
- **Manage Categories**: In this view, you can create, edit, hide, or delete categories for topics.
- **Logins for Integrations**: In this view, you can add online accounts for Twitter, Facebook, Dropbox™, Google Drive™, SkyDrive, Box™, Evernote®, Toodledo®, and Asana™.
- **In-App Purchases**: In this view, you can make in-app purchases.
- **About** - Shows information for the app, such as version.

My Settings

Refer to My Settings.

Backup, Restore and Sync

WHAT CAN I DO HERE?

PERFORM REGULAR BACKUPS of your LightArrow app data using the Email or Online backup features. ALWAYS backup before applying updates or before enabling Sync.

In this section of your LightArrow app, you can set up a folder for backing up your data and for syncing your data from device-to-device (online backups and syncs use the same folder). You can backup your data by emailing it to yourself or you can backup your data to an online folder (Dropbox™, Google Drive™, SkyDrive, or Box™). If you use email to back up your data, it does not back up audio clips, photos, videos, and local documents.

GLOSSARY OF TERMS

Sync: The ability to sync data back and forth from devices such as iPad, iPhone, and iPod touch.

EMAIL BACKUP

When you perform an Email Backup operation, all of your core LightArrow data at that point in time is saved in a file and sent to an email address which you specify. "Core data" is defined as all data except audio clips, photos, videos, and local documents. Before you can backup your data via email, you must specify an email address as described below. Then, simply tap **Email Backup** to initiate a backup operation. A pop-up dialog appears indicating that a new backup file will be created and emailed.

How to specify a backup email address:

1. In the Backup, Restore & Sync view, tap **Backup email address**.
2. Type the email address you wish to send the backup to.
3. You are now ready to perform an Email Backup by tapping **Email Backup**.

How to perform an email backup:

1. Ensure you set up a backup email address in the Backup, Restore & Sync view.
2. Simply tap **Email Backup** to initiate a backup operation. A pop-up dialog appears indicating that a new backup file will be created and emailed.
3. Cancel the operation, or tap **OK** to proceed. Tap **Send** to send the backup to the email as directed.

If your device has no network access when you perform an Email Backup operation, the outgoing message is placed in your Outbox. When access to a network is restored, this email is sent automatically.

ONLINE BACKUP

The **Backup/Sync online folder** field contains the cloud location to which your LightArrow app backup is sent when you perform a Online Backup operation. This location is a directory to an online file service such as Dropbox or Box. If no value is set, you cannot perform an Online Backup. Note that the backup file is not encrypted, so consider security when choosing the target cloud location for the backup.

How to set an online backup folder:

1. In the Backup, Restore, and Sync view, tap **Backup/Sync online folder**.
2. If you previously set up online folders, they will be available from your selection.
3. If you wish to set up new folders, tap **New**.
4. In the **New Online Folder** view, tap **File Service** and choose the File Service you wish to use.
5. In the **Email** field, type your Email that you use for sync and then tap **Sign in**.
6. Sign into the service that you plan to use and authorize usage of the app.
7. When the **New Online Folder** view appears, optionally set a name of the folder by tapping **Tap to set name**. If you don't name it, the app will name it for you.
8. Tap **Folder**.
9. Tap the name of the account, and then tap **Select** to select it. If you're setting up a folder for sync the first time, this is the preferred method; however, you can select a previously-created subfolder if you wish by tapping **Browse**. (If you need to return to the top-level folder, tap the **Home** icon.)
10. If you selected a subfolder, tap **Select** to select it. When the **New Online Folder** view appears, tap **Save**.

When you perform an Online Backup operation, all of your data at that point in time is saved to an online folder that you specify. Before you can backup your data via online services, you must specify an online folder as described previously. **Note**: This operation is only available when you have WiFi access.

How to perform an online backup:

1. Ensure you set up an online email address in the Backup, Restore & Sync view.
2. Simply tap **Online Backup** to initiate a backup operation. A pop-up dialog appears indicating that the operation will begin.
3. Cancel the operation, or tap **OK** to proceed.

CONFIGURE SYNC

Refer to the Sync section to learn more.

RESTORE FROM INBOX

Note: Restoring backups that were performed prior to an update of the application may not work. Therefore, any time you update your app from the App Store, you are strongly encouraged to perform a sync in iTunes and an Online Backup immediately.

Follow these steps to restore an email backup:

1. On your device, open the Mail application and access the account to which the backup was emailed.
2. In the Mail application, open the email message containing the backup that you wish to restore.
3. **Note**: By default, only one attachment is contained in an email, and it is named lifetopix.backup.xml. If you made modifications to the email message when you performed the backup operation, consider how those changes might affect these instructions.
4. Tap-and-hold the attachment in the email message. The mail application will ask you if you want to Quick Look, Open in 'Your App,' or Cancel.
5. Select Open in 'Your App,' which will invoke your app. At this point, your device has placed the backup file in a private location.
6. Then go to Backup, Restore & Sync and tap **Restore From Inbox**. You will see a message asking you to confirm that you want to remove all data and restore from the backup file. (If you have sync turned on, you will need to disable it first.)
7. Tap **OK** to perform the restore operation. After a short delay, the message box will go away, indicating that the restore has completed successfully.

FULL ONLINE RESTORE

When you perform a Full Online Restore operation, all of your device's app's data -- including your audio clips, photos, videos, and local documents -- are replaced with the app's data from the online folder that you specify. Before you can restore from the cloud, you must first ensure that you've set an online folder that contains the backup you wish to restore, as described above. Sync must be turned off before you perform a full online restore.

How to restore from an online backup:

1. the Backup, Restore & Sync view, tap **Full Online Restore** to initiate a restore operation from the cloud.
2. All data will be removed and replaced with the data from the cloud, and that it may take several minutes depending on network speed. Cancel the operation, or tap OK to proceed. Note: This operation is only available when you have WiFi access.

SYNC NOW

Tap **Sync Now** to perform an on-demand device-to-device sync.

BACKUP REMINDER

Your LightArrow app will remind you to back up your data on a regular basis. You can change how often you're reminded; the default is once a day.

How to change the Backup Reminder:

1. In the Backup, Restore & Sync view, tap **Backup Reminder**.
2. Select **Never**, **Once a day**, **Once in 3 days**, or **Once a week** and tap **Save**.

COPYING DATA FROM ONE DEVICE TO ANOTHER

You can use the online backup and restore features to accomplish a one-way copy of your data from one device to another via the cloud. This procedure also works for transferring data from My.Agenda to LifeTopix and vice versa.

1. In the Backup, Restore & Sync view, perform an online backup to an online folder from your source device.
2. Perform an online restore from that online folder on the new device. The data is replaced with the data from the original device.

Sync

Refer to Sync.

Secure Your Data

WHAT CAN I DO HERE?

In your LightArrow app, the Secure Your Data view allows you to set a passcode lock for your app, which provides extra security. In addition, some areas of the app that contain sensitive information require a PIN to see it. For example, If you plan to enter bank and credit card account number information in your LightArrow app, you should make sure that you specify a PIN in this view. In addition, if you set up lockers in the Bookmarks + Lockers topic, it's required that you set up a PIN.

AES 256-BIT ENCRYPTION

Military Grade 256-bit Advanced Encryption Standard (AES) encryption is included for sensitive data fields. This applies to PINs and account numbers in bank account detail, as well as for storing the password lock and secret question answers.

REVEALING PRIVATE DATA

In your LightArrow app, by default, the entire number for each financial account is **not** displayed. But on each view that contains that information, a lock is shown to allow you to reveal your private data. When you tap the lock icon, you are prompted to enter your PIN. In the Bookmarks + Lockers topic, the app will ask you to enter a PIN to reveal private data. Refer to Bookmarks + Lockers to learn more about lockers.

PASSCODE LOCK

If enabled, passcode locking prevents unauthorized access to your app.

How to set a passcode:

1. If the passcode lock feature is not enabled, go to **Settings** -> **Secure Your Data**.
2. Turn Passcode Lock to the ON position and tap Yes.
3. Change the passcode as described below.
4. Set a passcode timeout as described below.
5. Modify security questions as described below.
6. When you return to the **Secure Your Data** field, tap **Save**.

How to set a passcode timeout:

You must set a passcode before setting a passcode timeout. The passcode timeout specifies how long the app will run in the background before the application is locked.

1. Go to **Settings** -> **Secure Your Data**.
2. Tap **Set Timeout**.
3. Type the number of minutes you wish to set the timeout as. The default is 1.
4. Tap **Save**.

How to modify the passcode:

1. If the passcode lock feature is not enabled, go to **Settings** -> **Secure Your Data**.
2. Tap **Change Passcode**.
3. Type any combination of numbers, letters, or symbols in the **Passcode** and **Re-enter Passcodes** fields (they must match).
4. Tap **Save**.

How to modify the security questions:

1. If the passcode lock feature is not enabled, go to **Settings** -> **Secure Your Data**.
2. Tap **Manage Security Questions**.
3. Set a security question and security answer in case you forget your passcode. You can enter up to four security questions (each one is asked until an answer is provided correctly).
4. Tap **Save**.

PIN

If you plan to enter bank and credit card account number information or use lockers in your LightArrow app, you should make sure that you specify a PIN by following the procedure below.

How to set a PIN:

1. Go to **Settings** -> **Secure Your Data**.
2. Tap **Key (PIN)** and type any combination of numbers, letters, or symbols.
3. Tap **Save**.

Manage Categories

WHAT CAN I DO HERE?

In the Manage Categories view, you can add, delete, and modify any of the categories in your LightArrow app. You can set categories for Assets, Bookmarks, Events, Expenses, Notes, Products, Projects, Service Providers, Services, Subjects, Log Entry Units, or Shopping Items Units. For example, a category for Services might be "Home and Assets" and a subcategory could be "Auto Repairs." Auto Repairs would hold items such as timing belt or tire repairs.

Your app comes pre-loaded with categories that you can remove or modify, depending on the types of categories that are suitable for your life or work. In some cases, you're not able to remove default categories, such as "Media." In these cases, you can hide the category. When a category is deleted, it is completely removed from your app. When a category is hidden, it no longer appears in the Categories tile (in it's associated topic), but it remains defined, and is still available.

Note: You can also manage categories from other areas of the app (other than through **Settings**), for example, when you're creating projects you can tap **Manage Categories**.

How to add categories:

1. Go to **Settings** -> **Manage Categories**.
2. Tap the object you wish to add categories to.
3. Tap the plus sign at the top of the **Manage Categories** view to add a top-level category.
4. To add a subcategory for a parent category, tap the parent category and then tap **Subcategories**. Tap the plus sign to add subcategories.
5. Type the name for the category and an optional comment.
6. If you wish the category to be hidden from view, turn **Hide** to ON.
7. Tap **Save**.

How to remove categories:

You cannot remove categories that have items associated with them.

1. Go to **Settings** -> **Manage Categories**.
2. Tap the object you wish to remove categories from.

3. To remove a subcategory for a parent category, tap the parent category and then tap **Subcategories**.
4. You can swipe a category (to the left) to delete it or tap the category and then tap **Delete**.

How to modify categories:

1. Go to **Settings** -> **Manage Categories**.
2. Tap the object you wish to modify categories from.
3. To modify a subcategory for a parent category, tap the parent category and then tap **Subcategories**.
4. Tap **Configure**.
5. Type the name for the category and an optional comment.
6. If you wish the category to be hidden from view, turn **Hide** to ON.
7. Tap **Save**.

Note: You can also create a new category directly from the Categories tile in the details for most objects. For example, suppose you are defining a new event and, after tapping Categories, you decide that the category you want to associate the event with is not listed. From that category picker, simply tap the plus sign to display the **New Category** view.

Logins for Integrations

WHAT CAN I DO HERE?

The Logins for Integrations view allows you to view and configure the social media accounts that have been given access to your LightArrow app. The view also gives you central access to your accounts for LightArrow app integrations. You can provide access to Dropbox™, Google Drive™, SkyDrive, Box™, Evernote®, Toodledo®, and Asana™.

To add a Dropbox account:

1. Go to **Settings** -> **Logins for Integrations**.
2. In the **Dropbox** section, tap **Add Dropbox Account**.
3. Enter your credentials and grant access.

To add a Google account:

1. Go to **Settings** -> **Logins for Integrations**.

2. In the **Google** section, tap **Add Google Account**.
3. Enter your credentials and grant access.

To add a SkyDrive account:

1. Go to **Settings** -> **Logins for Integrations**.
2. In the **SkyDrive** section, tap **Add SkyDrive Account**.
3. Enter your credentials and grant access.

To add a Box account:

1. Go to **Settings** -> **Logins for Integrations**.
2. In the **Box** section, tap **Add Box Account**.
3. Enter your credentials and grant access.

To add an Evernote account:

1. Go to **Settings** -> **Logins for Integrations**.
2. In the **Evernote** section, tap **Add Evernote Account**.
3. Enter your credentials and grant access.

To add a Toodledo account:

1. Go to **Settings** -> **Logins for Integrations**.
2. In the **Toodledo** section, tap **Add Toodledo Account**.
3. Enter your credentials and tap **Sign In**.

To add an Asana account

1. Go to **Settings** -> **Logins for Integrations**.
2. In the **Asana** section, tap **Add Asana Account**.
3. Enter your API key and tap **Set**.

Note: find your Asana API key in the Account Settings from the Asana web application.

In-App Purchases

WHAT CAN I DO HERE?

In your LightArrow app, the **Manage Purchases** view allows you to purchase additional optional features for your app via in-app purchases. If you wish to

learn more about the in-app purchases that you can purchase, tap the **Learn More** buttons in each section in the view. A description displays to provide more information about the purchase.

Note: If you've updated your app and you don't see your in-app purchases, tap **Restore All Purchases** at the top of the view. If you're using multiple devices, tap **Restore All Purchases** on the secondary device to receive the in-app purchases on this device. The in-app purchases apply to all devices.

Search

WHAT CAN I DO HERE?

The Search view allows you to locate items within your LightArrow app. You can find topic items, data items, or log items. The app searches through all item titles; the full name of contacts; and text within notes. Within the Search view, you can find any item that you've associated with other items in your app. For example, if you created a checklist and associated it with a Health Project, you can find it in this view.

To locate items:

1. Enter the text directly in the Search bar for the item you're attempting to locate; to narrow the search, choose a type of item from the categories that are listed and enter your term in the Search bar.
2. Tap the item you find to select it or tap **Cancel** to exit and return to the Search view.

WHAT CAN I SEARCH FOR?

Specifically, you can locate the following items (depending on the app that you're using, and your in-app purchases):

Topic items:

- Asset
- Event
- Gift
- Note
- Contact
- Project

- Service
- Service Provider
- Shopping Item
- Shopping List
- Subject
- Trip
- Visitor

Data items:

- iOS Calendar
- iOS Reminder
- Appointment
- Audio
- Bookmark
- Checklist
- Drawing
- Expense
- File
- Photo
- Reminder
- Task
- Video

Log Items

- Activity
- Health Stat
- Medication
- Nutrition
- Wellness
- Goal

My Inboxes

WHAT CAN I DO HERE?

Whether you're a businessperson, parent, or student, you're inundated with information from many sources -- including email, social media, and the web. Most likely, you're hopping between Twitter, Email, Facebook, and the web to keep up with all of this information. The My Inboxes view is designed to be a single source for viewing and harvesting information from all of these channels. Furthermore, you can filter this information so you can find data that's important for you or your business by saving common searches with keywords, timeframes, and account names (people). As you discover and harvest information from multiple sources, you can make this information actionable. For example, your supervisor might request that you create a report via email or you might find a webinar mentioned on Twitter that you want to attend. You can convert these actionable items from web, email, or social channels into items you can take action on such as: tasks, notes, events, projects, trips, visitors, or products. For example, you can convert the webinar invitation found on Twitter into an event in just a few simple taps – no app switching is required.

If you follow the Getting Things Done® (GTD®) method, an inbox is "simply the place where all the incoming things land." Being able to record your ideas easily in a reliable system for later analysis represents the Collection phase of the GTD methodology. My Inboxes assists you in your implementation of the inbox in the GTD method.

The My Inboxes view also provides basic email and social media functionality, such as viewing, configuring, and deleting of the messages in your channels. In addition, the app makes contact management easy by allowing you to add email senders and recipients from email messages that you receive to your contacts and contact groups in a few simple taps. It's also important to note that you can save attachments to your online folders (such as Box or Dropbox) or to your local folders from this view. Social media functions are also available, such as interacting with your friends and followers, and are discussed below in the detailed online help.

Important: The inbox functionality is **not** meant to replace your Email, Facebook or Twitter clients. It aims to give you the ability to extract actionable information from those sources into the app via configurable feed rules utilizing text search and other criteria. Email feeds read only the Inbox folder of supported Email accounts, and go back to 1000 items at most. We have given some basic client functionality such as reply, retweet, etc. We will continue to

enhance this feature set over future updates with user feedback as well as new innovations.

Note: LightArrow apps currently do not support email accounts that are using 2-step verification.

Note: Advanced features require the Pro Inbox in-app purchase.

NOTES ABOUT IN-APP PURCHASES

The Pro Inbox Pack allows you to create custom inbox rules for Twitter, Facebook, email and web content. Convert inbox items to actionable app items such as tasks, projects, products, appointments, hosting events, attending events, notes, trips, visitors, and inbox items — and extract bookmarks and files.

Purchase extra inbox rules in packs of 10, 20, 50, or 100. Once you purchase the Pro Inbox pack, you will receive 10 custom inbox rules for creating social, email and web feeds. These packs are cumulative. For example, if you purchase the 10 pack and the 20 pack at a later time, you can manage a total of 40 inbox rules (with the out-of-box rules).

Email Support (IMAP 4 & Limited Exchange* Support)

Pro.Inbox Supports iCloud, Exchange, Google, Yahoo and Outlook.com mail allowing you to enjoy the convenience of converting email messages into a rich variety of data types and calendar items, such as tasks, appointments, events and more.

*Exchange support has only been tested for Exchange Online hosted by Microsoft. Supported configuration includes IMAP4 for "Exchange Online" with SSL/TLS option. We currently do not support some typical corporate Exchange environments, such as the Microsoft NTLM authentication and others. This is due to the limitations of the underlying 3rd party technology in LightArrow apps. Exchange support will be broader in future updates.

GLOSSARY OF TERMS

Clipboard: Holds text from the clipboard of your iOS device.

Feed Accounts: Your own email and social media accounts.

Feeds: Tiles that contain your messages that are harvested from different sources (email, Twitter, Facebook, and the Web).

Rules: Boundaries for the information you are harvesting from email, social media, and the web (e.g. filter by keywords, people, number of days, etc.).

Quick Inbox: Captures and holds any type of information quickly so you can provide more detailed information, such as a due date, later as time permits. Quick Inbox items can be converted to other types of objects, such as tasks or appointments.

ALERTS

Any item in the Quick Inbox that's open and due in the future for five days appears in the Alerts section of the My Inboxes view. Clipboard text also displays in the Alerts section to let you know that you have text you haven't yet applied to an item.

MANAGING FEEDS

Setting up feeds for your email, social media accounts, and the web allows you to harvest information from several channels all at once. This saves you time because you no longer have to view this information by switching to several different apps each day. In addition, once feeds are set up, you can convert their messages into actionable items such as tasks or events.

Your LightArrow app includes default feeds to get you started. They are indicated by yellow tiles and include:

- My Timeline - Your Facebook timeline
- My News Feed - Your Facebook news feed
- Favorited tweets - Tweets you've favorited
- Home - Your Twitter Home view
- My Tweets - Your own tweets
- Tweets Near Me - Tweets within a 1 mile radius
- What's Trending - What's trending on Twitter in the United States

How to set up email feed accounts in My Inboxes:

By adding your email accounts to My Inboxes, you can convert email messages to actionable items, such quick inbox items, tasks, notes, events, projects, trips, visitors, or products. For example, you can convert a webinar invitation to an event in just a few simple taps.

1. Tap the **Feed Accounts** tile in the My Inboxes view.
2. Tap **Add Email Account**.
3. Type a name to display (on the new tile that this process creates) as a title in the email in the **Name** field.

4. Choose the type of email (Gmail, Yahoo, iCloud, or Outlook.com) from the **Email Type** field.
5. Type your email (**Email** field) and password (**Password** field) and tap **Save**.

Note: If you want to remove an email account, simply select it from the Feed Accounts tile and tap the Trash can in the lower right of the screen.

How to add your social media feed accounts:

By adding your own social media accounts, you can convert items to actionable items, such as quick inbox items, tasks, notes, events, projects, trips, visitors, or products. For example, you can convert an article you want to read that you found on Twitter into a task in just a few simple taps.

Note: If you're syncing multiple iOS devices, for Twitter, you must set up the same Twitter accounts on all of your devices. The credentials do not sync for security reasons.

1. Tap the **Feed Accounts** tile in the My Inboxes view to view the accounts that are currently setup.
2. Go to your device's **Settings** app.
3. Locate Twitter and/or Facebook.
4. Turn the switch to the ON position for the LightArrow app you're using. Alternatively, switch to the OFF position to deny access.
5. Return to the LightArrow app and confirm access in the Feed Accounts tile.

USING THE QUICK INBOX

The Quick Inbox is for quickly gathering items that you wish to act on sooner or later. These items come from several sources, including email and social media channels. Being able to record your ideas easily in a reliable system for later analysis represents the Collection phase of the GTD methodology. My Inboxes assists you in your implementation of the inbox in the GTD method. The Quick Inbox is the "holding area" or "bench" for these "to-do" items.

How to quickly add items to the Quick Inbox for later reference:

1. Tap the **Quick Inbox** tile in the Inboxes view.
2. Tap the plus sign to display the **New Inbox Item** view.
3. Type a title, act by date (optional) and choose Soon or Someday. You can choose to convert these items to tasks or other items at a later time.

4. Tap **Save**. The item is added to the Quick Inbox it will also appear in it's respective topic.

How to Convert Quick Inbox items:

1. Tap the **Quick Inbox** tile in the Inboxes view.
2. Tap **Convert**.
3. Select the type of item you wish to convert the item to, such as: Task, Project, Shopping List, Gift for Others, Appointment, Reminder, Hosting Event, Attending Event, Note, Trip, or Visitor.
4. Confirm the conversion. **Note**: In My Settings, you can choose if Quick Inbox items should be deleted after conversion. By default, they are not.

CREATING FEEDS FOR YOUR COMMON SOCIAL MEDIA, EMAIL, AND WEB SEARCHES (NEW RULE VIEW)

Each time you create a new feed in your app, the My Inboxes view is populated with a tile for your feed. Rules in My Inboxes help you get productive by giving you quick access to your most commonly-searched items. By creating rules for your feeds, you can view commonly-searched information from email, Twitter, Facebook and the web -- and save these searches. You can act on information that you discover by converting the messages or other information to tasks, events, etc. You can interact with these messages directly from the app.

How to create an email rule to filter your email messages by keywords:

If you want to quickly find information in your email inbox about a person, place, or thing, you can create an email rule. For example, if you want to find every email that mentions your supervisor's name, you can configure a tile for it.

1. Tap the plus sign in the My Inboxes view and select **Email Feed**.
2. Type a title for the rule to describe it and distinguish it from other rules.
3. Tap the account(s) you wish to use. (You must first make sure you've added your email accounts to Feed Accounts.)
4. Add a person; type the text to search; and/or add the number of days to go back for the search (all keywords that you use will be searched).
5. Turn the **Include Read** switch to YES if you want to search Read email.
6. Tap **Save** and a tile is added to the My Inboxes view. You can view, configure, or delete the information from the new tile.

How to create a Twitter rule to view specific information on Twitter:

If you want to quickly find information on Twitter about subjects and/or people you're interested in, create a Twitter rule. For example, if you like country music, you can create a rule with the keyword "Country Music," and narrow it down more by adding your favorite artist's Twitter handle. You can also create rules that include your private and public twitter lists, which allows you to quickly view tweets from people with common interests.

1. Tap the plus sign in the My Inboxes view and select **Twitter Feed**.
2. Type a title for the rule to describe it and distinguish it from other rules.
3. Tap the account(s) you wish to use.
4. Select a Search type, such as **My Home** (Your Twitter Home view), **My Tweets** (specifies your tweets only), **My Lists** (your personal twitter lists), **Person** (a chosen account), **Public Lists** (public Twitter lists), or **All Twitter** (search all of Twitter for a specific string).
5. If you want to narrow the search to a particular person, type their name in the **Person** field, tap the Search icon, and select the user.
6. If you want to narrow the search to lists that you belong to, select **My Lists**, tap the **Search** icon, and then choose a list.
7. If you want to narrow the search to **Public Lists**, enter a person, and then tap the **Search** icon [next] tap **Twitter List** and then tap the **Search** icon to see all of the associated twitter lists for that user.
8. Type the keyword you want to search for in the **Look for** field.
9. Enter the number of days you want the search to go back in the **Number of days** field.
10. Tap **Save** and a tile is added to the My Inboxes view. You can view, configure, or delete the information from the new tile.

How to create a Facebook rule to view specific information on Facebook:

If you want to quickly find information on Facebook about subjects and/or people you're interested in, create a Facebook rule. For example, if you like productivity articles, you can create a rule with the hashtag "#Productivity."

1. Tap the plus sign in the My Inboxes view and select **Facebook Feed**.
2. Type a title for the rule to describe it and distinguish it from other rules.
3. Tap the account(s) you wish to use.

4. Choose a Search type such as, **My Timeline** (Your Facebook Timeline), **My News Feed** (your Facebook News Feed), **User Timeline** (a different user's timeline), or **All Facebook** (all of Facebook).
5. If you want to narrow the search to a particular person, type their name in the **Person** field, tap the Search icon, and select the user.
6. Type the keyword you want to search for and type the number of days you want the search to go back in the **Number of days** field.
7. Tap **Save** and a tile is added to the My Inboxes view. You can view, configure, or delete the information from the new tile.

How to create a web rule to view specific information on the web:

If you want to quickly find information on the entire web or on a chosen website, you can create a web rule. For example, if you want to view information about your company each day, you can set up a rule with your company's name. In addition, you can search for a subject on a website by specifying the website's address.

1. Tap the plus sign in the My Inboxes view and select **Web Feed**.
2. In the New Rule view, From the **Rule Type** field, select a rule type, such as **Web Search** (entire web), **Specify URL** (a chosen URL without a keyword search).
3. Type the keyword you want to search for in the **Search Term** field.
4. If you want to limit the search to a website, type the URL into the **Limit to Website** field. Some websites require "www," while other sites do not.
5. Tap **Save** and a tile is added to the My Inboxes view. You can view, configure, or delete the information from the new tile.

CONVERTING ITEMS IN FEEDS/CLIPBOARD TO ACTIONABLE ITEMS

My Inboxes makes it easy to convert your feed items to actionable items from email, social channels, or the web. You can convert these items to: quick inbox items, tasks, notes, events, projects, trips, or visitors. For example, you can convert a Webinar invitation found on Twitter into an event in just a few simple taps – no app switching is required.

Note: In **My Settings**, you can set whether or not Quick Inbox items are deleted after conversion. By default, they're not deleted after conversion.

How to convert Clipboard text a note:

If you have text saved in your device's clipboard that you want to keep for future use, such as reference material for a project, you can easily convert this text to a note or you can append the text to an existing note.

1. Tap **My Inboxes** in the left panel of the main view.
2. Tap the **Clipboard** tile.
3. Tap the **Convert** icon on the bottom left. Three choices display, which include **Convert to Any Type**, **Create as Note and Associate**, or **Append to Existing Note**.
4. Select an item to convert to (or) choose the item to convert to (or) choose the note you wish to append to.
5. Complete the required actions and tap **Save**.

Note: If you wish, you can also clear the clipboard text.

How to convert an email message to an actionable item:

If you receive an email with something you want to act on, you can convert it to an actionable item. For example, if you're researching a subject and you want to add reference material from an email to a note, you can do so with this action.

1. Tap the email feed tile and tap **View**.
2. Tap the email message you wish to convert to an actionable item.
3. Tap **Convert** and three choices display, which include **Convert to Any Type**, **Create as Note and Associate**, or **Append to Existing Note**. If you're using Evernote® or Toodledo®, you're also given options to convert to an Evernote or Toodledo note. Alternatively, choose **Smart Convert** for the app to narrow down the choices based on the best alternatives.
4. Select an item to convert to (or) choose the item to convert to (or) choose the note you wish to append to.
5. If you chose to create a note and associate an item with it, you will be asked to choose an item (such as a project or service provider).
6. Complete the required actions and tap **Save**.

How to convert a tweet to an actionable item:

If you find a tweet with something you want to act on, you can convert it to an actionable item. For example, if you find an article you want to read later, you can do so with this action by converting it to a note.

1. Tap the Twitter feed tile and tap **View**.

2. Tap the tweet you wish to convert to an actionable item.
3. Tap **Convert** and three choices display, which include **Convert to Any Type**, **Create as Note and Associate**, or **Append to Existing Note**. If you're using Evernote® or Toodledo®, you're also given options to convert to an Evernote or Toodledo note.
4. Alternately, you can choose **Smart Convert** if you wish the app to select the appropriate conversion type.
5. Select an item to convert to (or) choose the item to convert to (or) choose the note you wish to append to.
6. If you chose to create a note and associate an item with it, you will be asked to choose an item (such as a project or service provider).
7. Complete the required actions and tap **Save**.

How to convert a Facebook message to an actionable item:

If you see a Facebook message with something you want to act on, you can convert it to an actionable item. For example, if you see a message about a sale on a shoe you want to purchase, you can convert it to a product.

1. Tap the Facebook feed tile and tap **View**.
2. Tap the Facebook message you wish to convert to an actionable item.
3. Tap **Convert** and three choices display, which include **Convert to Any Type**, **Create as Note and Associate**, or **Append to Existing Note**. If you're using Evernote® or Toodledo®, you're also given options to convert to an Evernote or Toodledo note.
4. Alternatively, choose **Smart Convert** for the app to narrow down the choices based on the best alternatives.
5. If you chose to create a note and associate an item with it, you will be asked to choose an item (such as a project or service provider).
6. Select an item to convert to (or) choose the item to convert to (or) choose the note you wish to append to.
7. Complete the required actions and tap **Save**.

How to convert a web item to an actionable item:

If you discover something on the web that you want act on, you can convert it to an actionable item. For example, if you see an article you wish to read later, you can convert it to a note or task.

1. Tap the web feed tile and tap **View**.

2. Tap and hold an item from the web search to select the text and select **Process in *LightArrow App***.
3. The web page displays and you'll find an **Actions** menu at the bottom left.
4. Tap **Convert** and three choices display, which include **Convert to Any Type**, **Create as Note and Associate**, or **Append to Existing Note**.
5. If you chose to create a note and associate an item with it, you will be asked to choose an item (such as a project or service provider).
6. Select an item to convert to (or) choose the item to convert to (or) choose the note you wish to append to.
7. Complete the required actions and tap **Save**.

DELETING FEEDS

Sometimes you might create a feed that you no longer need to use so you might wish to delete it. Keep in mind that you cannot edit or remove the default feeds, such as Favorited Tweets, What's Trending, etc.

How to delete a feed:

1. Tap on a tile that contains the feed you wish to delete.
2. Tap **Delete**.

INTERACTING ON TWITTER

You can interact with others on Twitter directly from your LightArrow app. You can retweet, reply to, and favorite tweets. In addition, you can follow users directly from your LightArrow app.

How to retweet tweets:

1. Tap the tile that contains your Twitter feed and tap **View**.
2. Tap a tweet, and then tap the Twitter button and choose **Retweet**.
3. Edit the tweet as desired and tap **Send** to retweet it. If you change your mind, tap **Close** and tap the back arrow.

How to reply to tweets:

1. Tap the tile that contains your Twitter feed and tap **View**.
2. Tap a tweet, and then tap the Twitter button and choose **Reply**.
3. Type the tweet as desired and tap **Send**. If you change your mind, tap **Close** and tap the back arrow.

How to follow users:

1. Tap the tile that contains your Twitter feed and tap **View**.
2. Tap a tweet, and then tap the Twitter button and choose **Follow** or view the tweet by tapping view and choosing the same option from the menu at the bottom left.
3. If you have multiple Twitter accounts, choose the account you wish to follow from by tapping it.

How to "favorite" users' tweets:

1. Tap the tile that contains your Twitter feed and tap **View**.
2. Tap a tweet, and then tap the Twitter button and choose **Favorite** or view the tweet by tapping view and choosing the same option from the menu at the bottom left.
3. If you have multiple Twitter accounts, choose the account you wish to "favorite" from by tapping it.

INTERACTING ON FACEBOOK

You can interact with others on Facebook directly from your LightArrow app. You can reply to Facebook posts and comment on Facebook posts.

How to view Facebook posts:

1. Tap the tile that contains your Facebook feed and tap **View**.
2. Some details on posts might not be available because of permissions. For some users, you might be required to log in as indicated.

How to reply to Facebook posts:

1. Tap the tile that contains your Facebook feed and tap **View**.
2. Tap a post, and then tap the Facebook button and choose **Reply**.
3. Type your reply in the available field and tap **Post**. If you change your mind, tap **Close** and tap the back arrow.

How to view Facebook comments:

1. Tap the tile that contains your Facebook feed and tap **View**.
2. Tap a post, and then tap the **Facebook** button and choose **Comments**.

How to "like" Facebook posts:

1. Tap the tile that contains your Facebook feed and tap **View**.
2. Tap a post, and then tap the Facebook button and choose **Like**.

INTERACTING WITH EMAIL MESSAGES

Before you begin interacting with email, you must tap Feed Accounts to set up your email accounts, and then set up feeds for your email accounts. With email, you can interact by replying, forwarding, replying to all, and marking as unread.

How to reply to an email message or forward an email message:

1. Tap the tile that contains your Email feed and tap **View**.
2. You can reply directly from this view by tapping the **Email** button and choosing **Reply**, **Reply All,** or **Forward**. Alternatively, tap **View** to read the message and use the menu at the bottom left with the same options.
3. Complete the message, and tap **Send**.

How to mark an email message as read:

1. Tap the tile that contains your Email feed and tap **View**.
2. You can mark the email message as read from this view by tapping the **Email** button and choosing **Mark As Read**. Alternatively, tap **View** to read the message and use the menu at the bottom left with the same option.
3. The message will now appear as read.

SAVING EMAIL SENDERS TO YOUR CONTACTS AND CONTACT GROUPS

LightArrow apps make it easy to save senders to your app's contacts or contact groups in a few simple taps. Once you've added your friends, family, and colleagues to your app's contacts, you can save them to your iOS contacts in just a few simple taps.

How to convert an email sender to a contact:

1. Tap the tile that contains your Email feed.
2. You can save the contact from this view by tapping the **People** button and choosing **Convert Sender to Person**.
3. If you want to view the details of the contact, tap **OK**. Otherwise, click **Cancel**. If you click **Cancel**, the contact is added but the details are not shown.
4. If you chose to view the Contact, it is displayed with the information from the email completed.

How to convert all email senders and recipients from an email message to contacts:

1. Tap the tile that contains your Email feed and tap **View**.
2. You can save the contact(s) from this view by tapping the **People** button and choosing **Convert Everyone to Persons**.
3. Tap OK and the people are added to your app's contacts.

How to convert an email sender to a contact and add the contact directly to a group:

1. Tap the tile that contains your Email feed.
2. You can save the contact from this view by tapping the **People** button and choosing **Add Sender to Group**.
3. Pick a group by tapping it from the **Groups** view.
4. If you want to view the details of the contact, tap **OK**. Otherwise, click **Cancel**. If you click **Cancel**, the contact is added but the details are not shown.
5. If you chose to view the contact, the **Contact Group** view is displayed with the added contact.

How to convert all email senders and recipients from an email message to a group:

1. Tap the tile that contains your Email feed.
2. You can save the contact(s) from this view by tapping the **People** button and choosing **Add Everyone to Group**.
3. Pick a group by tapping it from the **Groups** view.
4. Tap OK and the contact(s) are added to your app's contacts.

SAVING EMAIL ATTACHMENTS TO ONLINE OR LOCAL FOLDERS

If an email message contains an attachment, the app makes it easy to save it to a local folder or to an online folder (such as Box or Dropbox). If you wish to save your attachment to an online folder, make sure to set up online folders in the Notes + Files topic.

How to save attachments from your messages:

1. Tap the tile that contains your feed, tap the email message, and then tap **Save Attached**.
2. Alternatively, if you wish to view the message before downloading the attachment, tap **View**, then select the **Save Attachment** option from the bottom left of the view.

3. When the list of folders displays, choose the folder you wish to save the attachment to, and then tap **Save**.

My Contexts

WHAT CAN I DO HERE?

The My Contexts view allows you to set tags for many items in your LightArrow app. Your app includes many features to support **David Allen's Getting Things Done®** (GTD) method, and it also provides powerful project management features that are essential for those who wish to gain control over their busy personal and professional lives. The My Contexts view is no exception. In GTD, Contexts are typically based on a physical location, resource, or the equipment that's necessary to complete a task. The context defines *how* and *where* the item will be completed. *How* defines the tools, such as @laptop and *where* defines the location, such as @home. Examples of Contexts are @office, @home, @grocery store, @computer, @train, @vacation, or @phone. Also, in GTD, items are allowed more than one Context. For example, you could assign a Context of @office and @phone for phone calls that are completed at the office. In your LightArrow app, contexts are completely configurable to meet your needs and items can include zero or more contexts. You can configure contexts in the My Contexts view, and you can also access all the items defined with these contexts directly from this view. You can use the My Contexts view as a holding area for tasks that are waiting to be completed. For example, you can assign a context of @train to items that you can complete while you're commuting on a train. The next time you're on the train, you can open the My Contexts view and then choose items you wish to complete because they're neatly organized in groups for the context tag of @train. Furthermore, you could define a context of @10 minutes, which can include items that you can complete in 10 minutes. This way, you can always get a few things done when you're in between meetings. Additionally, you can use tags to organize information. For example, you might want to create a tag for all "home assets" and all "business assets" and apply these tags accordingly to sort this information in the My Contexts view. In your app's lists views, items that are tagged are identified with a small tag icon with the color you've defined for the tag. The following items can be tagged with contexts:

- Appointments
- Assets
- Audio

- Bookmarks
- Checklists
- Events
- Expenses
- Files
- Gifts
- Goals
- Metrics
- Notes
- Persons
- Photo
- Projects
- Reminders
- Service Providers
- Services
- Subjects
- Shopping Lists
- Tasks
- Trips
- Video
- Visits

How to add new context tags throughout the app:

You can add context tags throughout the app by using the **New Contexts** view.

1. After tapping a Context tag tile (for the items listed above), and then tapping **New**, the **New Context** view appears.
2. Type the Tag name in the **Tag** field.
3. Tap the Color to identify the tag in the **Color** field.
4. Tap **Save**.

How to add new context tags to the My Contexts view:

1. In the My Contexts view, tap the plus sign (Tap **My Contexts** and then tap the plus sign).
2. Type the name of the tag in the **Tag** view.
3. Select a color for the tag by tapping the color field and choosing a color.
4. Tap **Save**.

How to modify context tags:

1. In the My Contexts view, tap the context tag you want to modify and then tap **Configure**.
2. Type the name of the tag in the **Tag** view.
3. Select a color for the tag by tapping the color field and choosing a color.
4. Tap **Save**.

Note: You can also tap **Color** from the expanding cell to change or set the color of the tag.

How to assign context tags to items:

There are different ways to assign context tags to items in your app; however, the most common ways include:

- Opening an item, then tapping the **Contexts Tags** tile, and choosing the tags you wish to apply.
- Tapping an item, tapping **More** and choosing **Tags**, and choosing the tags you wish to apply.
- Tapping an item, tapping **Tags**, and choosing the tags you wish to apply.

How to view context tags that are assigned to items:

1. In the My Contexts view, tap the context tag for which you want to view associated items.
2. Tap **View**.
3. The Context view appears, which organizes the items among **Type**, **Undated**, and **Name**. Tap one of these options to view it by type, undated, or name.

How to delete context tags:

1. In the My Contexts view, tap the context tag you want to delete and then tap **Delete**.
2. The tag is deleted.

My Apps

WHAT CAN I DO HERE?

The My Apps view allows you to launch many of your third-party apps directly from your LightArrow app -- no more searching for apps or exiting your LightArrow app to locate and launch the apps that you frequently use.

GLOSSARY OF TERMS

URL Schemes: You can launch your favorite apps by simply setting up URL schemes. The format of the URL scheme is *app name://*. For most apps, the URL scheme includes the name of the app, such as *Yelp://*. However, some apps such as Facebook use an abbreviated name. For example, for Facebook the URL scheme is *fb://*.

You can find URL Schemes for popular apps at:

- **LightArrow**: **Launch URLs for Popular Apps.**
- **HandleOpenUrl**: **http://handleopenurl.com**

To set up an app to launch from the My Apps view:

1. From the Dashboard, tap **My Apps** from the View Selector and then tap the plus sign.
2. In the **Name** field, type the name of the app.
3. In the **Launch URL field**, type the URL scheme, such as app name://.
4. Tap the information icon next to the **App Id** field -- for many apps, all the information is completed after this action is completed. If not, follow the next steps.
5. In the **App Id** field, tap the Disclosure button to auto-fill the App Id.
6. Tap **Save**.

After you complete the above procedure, the app displays in the My Apps view, and you can launch your app directly from this view by tapping the app and then tapping **Launch**. If the app does not launch correctly or an incorrect app icon displays, you might need to modify the App Id manually. To find the correct App Id, conduct a Google search. **Hint**: From the App store, the app id is the number shown in bold in the following example in the URL of the page, such as: http://itunes.apple.com/us/app/lifetopix/id**399076264**?mt=8
(e.g. **399076264** is the App Id).

Note: Some apps do not support this functionality.

To modify the app id:

1. In the My Apps view, tap the name of the app you wish to modify.
2. Tap **Configure**.
3. Modify the launch URL, if needed, in the **Launch URL** field.
4. Modify the App Id directly in the field.
5. Tap **Save**.

To delete a reference to an app:

1. In the My Apps view, tap the name of the app you wish to modify.
2. Tap **Clear From My Apps**.

The 12 Topics

The following sections describe the 12 Life Topics.

Tasks + Projects

WHAT CAN I DO HERE?

Tasks + Projects gives you the ability to create, organize, prioritize, track, and check off even your most complex projects and tasks in a streamlined, natural, and easy-to-understand way. You can create projects for any type of work you wish to complete, and your app also includes built-in projects for health and education. For example, you can create a Health Project for losing 10 pounds or an Education Project for an item such as a Master's thesis.

For projects, you're able to associate reference data such as checklists, appointments, reminders, bookmarks, files, audio (voice memos), photos, videos, drawings, notes, expenses, services, and shopping items. To keep your project on task, automatic reminders through integration with your device's calendar are available. Tasks can be recurring, and you can easily view and update tasks from your calendar. In addition, your app supports management of Google™, Asana™, or Toodledo® tasks.

GLOSSARY OF TERMS

Projects: A group of tasks and reference materials designed to produce a product, service or other type of result. Projects can be used for business, health, education, or other categories that are suitable for your life or business.

Tasks: A piece of work to be completed.

Online Tasks: Tasks from online apps or services, such as Google™, Asana™, or Toodledo®.

TOUCHPOINTS

Touchpoints to other LightArrow app topics allow you to define tasks and projects from within the context of those topics. For example, if you need to perform work for events you're planning, you can define tasks directly in the Events + Appointments topic. The same is true for assignments you have for school or work defined in the Education topic, for health procedures defined in the Health + Goals topic, for services you receive as defined in the People +

Services topic, and so on. In all of these cases, the task information you enter will be accessible not only from those topics, but also from Tasks + Projects.

CATEGORIES FOR TASKS + PROJECTS

Categories are available for use with Tasks + Projects. You can create, modify, hide, or delete categories via Settings or directly from a tile for a Project. When a category is deleted, it is completely removed from your app. When a category is hidden, it no longer appears in the Categories tile, but it remains defined, and is still available in the category list when you are defining a new Project. Note that categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden. For information about creating categories, refer to your help for Managing Categories.

ALERTS

Alerts display at the top of the Tasks + Projects view for anything related to projects or tasks that are due within the next five days or currently overdue. For example, if you've set a task to pick up your dry cleaning, it will appear in the Alerts section.

LOCAL NOTIFICATIONS

Local notifications will also alert you to projects and tasks depending upon the reminders that you've set up in My Settings.

PROJECTS (NEW PROJECT / PROJECT VIEW)

A project is any individual or collaborative undertaking that is planned and designed to achieve a particular goal. Projects typically have tasks associated with them. An example of a project could be "Re-organize Kitchen" or "Re-build Website." In your LightArrow app, you can associate several types of items to projects in order to efficiently plan them, and to organize them in a way that you can easily find the information that you need. For example, you can associate tasks, checklists, appointments, expenses, shopping items, files, and other items.

Refer to Projects to learn more about creating, modifying, and deleting projects.

TASKS (NEW TASK / TASK VIEW)

A task is a piece of work to be undertaken. You can create tasks in multiple places in your LightArrow app; however, the Tasks + Projects view is the central location for managing tasks. You can view all tasks from the Tasks + Projects topic, by tapping the **Tasks** tile (including those synced from Google, Toodleo, or Asana). Tasks in this view are sorted in ascending order of due date. If you wish to search for a task, tap the magnifying glass at the top-right of the view.

To group tasks:

There are two selectors at the top-left of the Tasks view. The first selector allows you to show all tasks (ungrouped) or show by category, context tag, due date, last updated, status, associated item, priority, or task owner. The second selector allows you to view by open and closed, open only, or closed only.

1. In the Tasks view, tap the selector at the top-left of the view.
2. From the selector,
   choose **Ungrouped**, **Category**, **Context Tag**, **Due Date**, **Last Updated**, **Status**, **Associated**, **Priority**, or **Task Owner**. The app remembers the previous selection.
3. From the second selector, you can further filter the view by choosing **Open** and **Closed**, **Open Only**, or **Closed Only**.

CREATING TASKS

To create a new task:

1. If you're creating the task in the Tasks + Projects view, tap the plus sign and then select **Task**.
2. To quickly create a task, type a name and start date, and then tap **Save**.
3. Optionally, type a name for the task and tap **Full Details**.
4. Add a due date and optional comment to the task.
5. Select a priority for the task, which includes Low, Medium, or High. This allows you to view the tasks by Priority to help you make decisions about selecting tasks.
6. Optionally enter the number of hours this task will take in the **Effort** field. You can use decimal points.
7. If you wish to create a repeat schedule, tap **Tap to configure repeat schedule** (refer to Repeat Schedules).
8. Tap the **Dates** tile to add start and end dates for the task, then tap **Set**.
9. Select or add a category by tapping the **Categories** tile.
10. Optionally add context tags to the task by tapping the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
11. If you wish to associate this task with a project, event, goal, service, etc., tap the **Associate Topic** tile, tap the type of item you with to associate it with, and then choose the item by tapping it.

12. If you wish to associate this task with a contact, tap the **Associated Contact** tile, tap the contact you wish to associate it with, and then tap **Save**.
13. If you wish to add task owner(s), tap the **Owner** tile, tap the plus sign, choose the owners to associate it with, tap **Save**, and then tap the back arrow.
14. If you wish to change the iOS calendar that the task is associated with, tap the **iOS Calendar** tile and then select **Specify iOS Calendar**.
15. To add a location for the task, tap **Location** and select one of the options.
16. Tap **Save**.

MODIFYING TASKS

How to modify a Task:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to modify and then tap **Open**.
3. Modify the items as directed.
4. Tap **Save**.

CHANGING PRIORITY OF TASKS

How to set the priority of a Task:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to set priority on, and then tap **Open**.
3. Tap the **Priority** field, and then choose **Low**, **Medium**, or **High**.
4. Tap **Save**.

CHANGING EFFORT OF TASKS

How to set the effort of a Task:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to set effort on, and then tap **Open**.
3. Tap the **Effort** field, and type the number of hours. Decimal points are allowed.
4. Tap **Save**.

CHANGING THE STATUS OF TASKS

How to change the status of tasks:

1. Access tasks from the **Tasks** tile or from the Agenda view
2. Tap on the task.
3. When the task expands, tap **Status**.
4. Choose Not Started, In Progress, On Hold, Completed, or Canceled.
5. The Status is indicated in the expanding cell by color and icon. Completed tasks are crossed out.

DELETING TASKS

How to delete a task:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to delete to expand the row, and then tap **Delete**.

PRINTING, SHARING, AND DISCUSSING TASKS

You can print individual tasks, share tasks via email or discuss tasks via social media or SMS. Users who receive a task via email can manage it in their app.

How to print a task:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to print and tap **Open**.
3. Tap **Actions** and then tap **Print**.
4. A PDF file is created and an alert appears asking if you wish to save the document as a local document. If so, tap **Yes**, otherwise tap **No**.
5. Tap the Share icon at the top of the view and then tap **Print**.
6. Print the document to the selected printer.

Note: You can also open the PDF document and save it to an online service, such as Dropbox, by tapping the Share icon and choosing an online service.

How to share a task via email:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient and then tap **Send** to send the email.

How to collaborate about a task:

1. Tap the **Tasks** tile in the Tasks + Projects topic.

2. Tap the task you wish to collaborate on, and tap **Open**.
3. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.
4. A message displaying, "I'm working on a task (task name). Any recommendations?" appears.
5. Modify the message as desired and send it.
6. If you wish to view the replies at a later time, tap **View Replies**.

TASK OWNERS

You can assign multiple owners to a task and email those task owners directly via email, and they can open the task directly in their LightArrow app from the email message.

How to send a task to task owners:

1. Tap the **Tasks** tile in the Tasks + Projects topic.
2. Tap the task you wish to send and tap **Open**.
3. Tap the **Owners** tile and tap the Add icon. Add owners to the task by choosing them from your contacts. Tap **Save**.
4. Go back to the Task view.
5. Tap **Share** and then tap **Email**.
6. An email message appears (with instructions) which allows you to send the task directly to the owners. If their email addresses are saved in your contacts, they're automatically added to the message.
7. Modify the message as desired and send it.

ONLINE TASKS VIEW

LightArrow apps support tasks from Google, Toodledo, and Asana. To understand the issues involved in syncing LightArrow app tasks and Google Tasks, please refer to the **Google information page**. To understand the issues involved in syncing LightArrow app tasks and Toodledo tasks, please read the **Toodledoo information page**. Syncing tasks requires a network connection.

Google-specific information:

- Google Tasks supports subtasks and LightArrow apps do not. Therefore, all Google tasks are displayed in a flat list.
- Once you sync a task, if you delete that task in your LightArrow app, it is also removed from your online service.

Toodledo-specific information:

- Any tasks in your Toodledo online account, which do not have a folder specified, will reside in the Root Folder in the Toodledo section.
- The Toodledo Root Folder always appears at the top of this section, followed by of all your Toodledo folders, sorted alphabetically.
- Toodledo supports subtasks and LightArrow apps do not. Therefore, all subtasks are not supported.
- Once you sync a task, if you delete that task in your LightArrow app, it is also removed from your online service.
- If you don't wish for your Toodledo tasks that are synced with LifeTopix to appear on your iOS calendar (e.g., you're already showing them on your calendar from Toodledo and you don't want a double entry), go to **Settings**, scroll to the bottom, and underneath **iOS Calendar Reminders** set Tasks to the "No Calendar" entry. Then tap **Save**.
- You can control pushing Toodledo tasks to your calendar by turning off Calendars in your Settings, or you can specify a different default iOS Calendar.
- Your LightArrow app will only push new tasks to Toodledo if the Sync button on the Task toolbar is set to Toodledo. That will push a Task to Toodledo. If a task is already synced with Toodledo, when a Task is saved, the changes are then pushed to Toodledo.

Asana-specific information:

- Asana supports subtasks and LightArrow apps do not. Therefore, all subtasks are not supported.
- Once you sync a task, if you delete that task in your LightArrow app, it is NOT removed from your online service.

How to use Google tasks:

1. Tap the **Online Tasks** tile from the Tasks + Projects view.
2. In the Google section, tap **Login**.
3. Enter credentials for your Google account.

How to use Toodledo tasks:

1. Tap the **Online Tasks** tile from the Tasks + Projects view.
2. In the Toodledo section, tap **Login**.
3. Enter credentials for your Toodledo account.

How to use Asana tasks:

1. Tap the **Online Tasks** tile from the Tasks + Projects view.
2. In the Asana section, tap **Login**.
3. Find your Asana API key in the Account Settings (Apps tab) from the Asana web application.
4. Enter the key.
5. Choose a workspace and tap **Save**.

How to sync tasks from online services:

To use online tasks in LightArrow, you must sync your tasks. When you sync online tasks to your LightArrow app, if the online version of that task has the most recent timestamp, all of its information is copied to your LightArrow app. If the version of that task in your LightArrow app has the most recent timestamp, all of its information is copied to the online task.

1. From the Tasks + Projects topic, tap the **Online Tasks** tile.
2. Tap your project, folder, or task groups' name in the list of Online Tasks.
3. Tap the Cloud icon to sync individual tasks. Tap **Sync All** to sync all the tasks in the group. Tasks that are synced show a checkmark and also display in your task lists (in the Tasks + Projects view).
4. Once you've synced tasks, you can modify or delete them as if they were LightArrow app tasks.

If a previously-synced task in your online service has been deleted from the online service, the LightArrow copy of that task will be deleted as soon as you perform a Sync All. If a hybrid task is deleted from your LightArrow app, but not deleted from the online service from which it originally came, the next Sync All operation will cause the hybrid task to be re-created in your LightArrow App. Tasks that were added to the online service will result in a copy of that task being created in the LightArrow app upon the next Sync All operation.

How to sync LightArrow app tasks to online services:

Before attempting to sync tasks, ensure you've added your credentials for the online service. See Logins for Integrations for more information.

1. From the Tasks + Projects topic, tap the **Tasks** tile.
2. Open a task by tapping it and then tapping **Open** when the cell is expanded.
3. Tap **Sync**.

4. Choose the service you wish to sync the task with, such as Google, Toodledo, or Asana.

ASSOCIATING ITEMS WITH PROJECTS

The Tasks + Projects topic helps you to be more productive by allowing you to associate tasks, checklists, appointments, reminders, bookmarks, files, audio, photos, video, drawings, notes, expenses, services, and shopping items to projects. For example, if you're working on a landscaping project, you might set up appointments with your landscape designer and you'll want to be able to easily see all appointments associated with the landscaping project in one place. By associating appointments with the landscaping project, you have a central location to view these appointments.

How to associate a task with a project:

You can associate a project with a task or a task with a project.

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select a project that you want to associate it with.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a checklist with a project:

You can create a checklist in the Notes + Files, Lists topic and associate it with a project in the Tasks + Projects topic (or) you can associate a checklist with a project directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes + Files, Lists help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.

4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate an appointment with a project:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a project, follow the procedure below.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with a project:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to a project, follow the procedure below.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.

4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a bookmark with a project:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Tasks + Projects topic (or) you can associate a bookmark to a Tasks + Projects topic directly from the Tasks + Projects topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate a file reference with a project:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with a project (or) you can associate a file reference to a project directly in the Tasks + Projects topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.

6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate photos, audio, drawings, or video with a project:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in Tasks + Projects (or) you can associate a media item with a project directly from the Tasks + Projects topic. For detailed information about creating media items, refer to the Media help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the project.

How to associate a note with a project:

You can create a note in the Notes + Files, Lists topic and associate it with a project (or) you can associate a note to a project directly from the Tasks + Projects topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate an expense with a project:

You can create an expense in the Finances topic and associate it with a project (or) you can associate an expense to a project directly from the Tasks + Projects topic. For detailed information about expenses, refer to the Finances help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.
5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

How to associate a service with a project:

You can create a service in the People + Services topic and later associate it with a project in the Tasks + Projects topic (or) you can add a service directly in the Tasks + Projects topic. For detailed information about services, refer to the People + Services help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing service item, tap **Service** and select the service you want to add by tapping it.
5. If you're adding a new service, tap **Service** and add the necessary information for the service.
6. Add other optional information.
7. Tap **Save**.

How to associate a shopping item with a project:

You can create a shopping item Shopping + Gifts topic and later associate it with a project in the Tasks + Projects topic (or) you can add a shopping item directly in the Tasks + Projects topic. For detailed information about shopping items, refer to the Shopping + Gifts help.

1. Locate a project by tapping the Projects tile in the Tasks + Projects topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing shopping item, tap **Shopping Item** and select the shopping item you want to add by tapping it.
5. If you're adding a new shopping item, tap **Shopping Item** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

Shopping + Gifts

WHAT CAN I DO HERE?

The Shopping + Gifts topic enables you to manage all the information related to your shopping needs, including products that you often buy, sellers where you buy items, shopping items that you need to pick up, shopping lists, things you want to sell, gifts given and received, and coupons. Your app comes loaded with common products; however, you're welcome to delete or modify any of those default shopping products. What's handy about the Shopping + Gifts topic is you can view your shopping items in the Near Me view, which makes you more productive because you can better plan your shopping trips by location. In addition, through Foursquare™ integration in the Near Me view, you can easily search for and convert your favorite stores or other businesses into sellers in a few simple taps that you can use in your Shopping + Gifts topic.

If you're using the My.Shopping app, you'll find that you will receive most, but not all of features described here (such as "Touchpoints"). If you want to purchase the full app, you can find it at: https://itunes.apple.com/us/app/lifetopix-all-in-one-personal/id399076264?mt=8

GETTING STARTED

If you haven't done so already, when you begin using the My.Shopping app or LightArrow app Shopping + Gifts topic, start by setting up the following:

- **Categories**: (**Settings** -> **Manage Categories**) Set up categories for bookmarks, coupons, products, sellers (service providers), and shopping items units.

- **Sellers** tile: Remove and add sellers that you use.
- **Products** tile: Remove and add products that you frequently purchase.
- **Backup, Restore, & Sync**: (**Settings** -> **Backup, Restore & Sync**) If using Sync + Share, set up device-to-device sync.

GLOSSARY OF TERMS

Products: All purchasable items defined in the app. A "product" is something you acquire from a store, company, or person. Milk, video-on-demand movies, clothing, electronics, and garden tools are all examples of products.

All Shopping Items: Items you need to purchase. When you add shopping items, you select from your configured products. You can remind yourself to purchase individual shopping items or you can add shopping items to shopping lists.

Shopping Lists: Lists that hold products to purchase.

Things to Sell: Items you wish to sell or have already sold.

Gifts for Others: Items you have given or plan to give to other people.

Gifts Received: Items you have been given by other people.

Coupons: Touchpoint to the Coupons category of the Notes + Files topic.

Sellers: All vendors of products.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between the Shopping + Gifts topic, in Events + Appointments, and Travel + Places, and Notes + Files topics. For example, imagine you have a list of supplies to buy for a party you are hosting. The supply list you define in the Events + Appointments is also accessible from Shopping. Or, if you specify items you want to buy for a trip you have defined in Travel + Places, those are also accessible from the Shopping + Gifts topic.

ALERTS

Alerts display at the top of the Shopping + Gifts view for anything related to shopping or gifts that are due within the next five days or currently overdue. For example, if you have a shopping item, such as milk, that's due, it will appear in the Alerts section.

LOCAL NOTIFICATIONS

Local notifications will also alert you to shopping lists depending upon the reminders that you've set up in My Settings.

LOCATION SERVICES

If a Shopping Item has a Seller, and if the Seller has a location set, those shopping items with that Seller will be available in the “Near Me" view.

CALENDARS AND AGENDA

If you wish for shopping items and shopping lists to appear in your calendar and agenda, check **Include Shopping Items** and **Include Shopping Lists** from the Filter icon in the Agenda and Calendar views. If you wish for your closed shopping items to **not** show in your calendar and agenda, uncheck **Include Closed Items** from the Filter icon included in your Calendar and Agenda views.

CATEGORIES

Categories are available for use with products. You can create, modify, hide, or delete categories via Manage Categories. When a product's category is deleted, it is completely removed from your app. When a products category is hidden, it no longer appears as a category for products, but it remains defined in the app and is still available in the category list when you are defining a new product. Note that products' categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden.

CONFIGURING PRODUCTS

A "product" is something you acquire from a store, company, or person. Milk, video-on-demand movies, clothing, electronics, and garden tools are all examples of products. Your LightArrow app come pre-configured with a list of commonly-used products. You can add new products, modify existing products, or delete products. For products, you can save details such as category, sellers, unit price, and type of unit. When you create shopping lists or shopping items, you select from your list of products. You can create multiple products with the same name with different sellers. When you start using the Shopping + Gifts topic, you should configure the products that you commonly use and remove the products that you don't use.

There are different ways to configure products. You can configure products directly from the Products tile or you can define products on demand when you're creating shopping lists or shopping items.

How to configure products:

1. In the Shopping + Gifts topic, tap the **Products** tile.
2. You can view products by category, all, or last updated.
3. If you wish to add a product to a **Category**, choose **Category** from the filter, tap the category, and then tap **Tap to add a New Product**.

4. **Tip**: You can add new categories by tapping **Manage Categories**. You can add subcategories, such as "Dairy Aisle" to "Groceries" in order to sort your grocery lists by grocery aisle.
5. If you wish to modify an existing product, tap the product and then tap **Open**.
6. If you wish to delete an existing product, tap the product and then tap **Delete**.
7. Type a name for the new product or modify the existing product name.
8. Add a photo to the product to represent it by tapping **Add Photo**.
9. Add an optional comment about the product.
10. If necessary, select or add a new category.
11. For new products, tap **Create and Add More Data** to add sellers and any associated items.
12. If you wish to add a new seller, tap **Tap to add Sellers** (or) if you wish to modify the seller, tap the seller's name.
13. Select the seller and tap **Save**.
14. Optionally add items to the product, such as tasks, checklists, reminders, etc. by tapping the plus sign.
15. Tap **Save**.

How to delete products:

1. In the Shopping + Gifts topic, tap the **Products** tile.
2. Tap the item you wish to delete, and then tap **Delete**.

Tip: You can add photos to products and they will display in their respective tiles in the Shopping + Gifts topic. This way, you will be able to easily identify the products you wish to purchase.

Refer to Photos for information about adding Photos to items, such as Products.

ALL SHOPPING ITEMS

The All Shopping Items view shows all shopping items that you've added individually, and also shows all items that have been added to lists. If you wish, you can add items to shopping lists directly from this view or you can create your lists and add shopping items to them in the Shopping Lists view. This view also allows you to sort your shopping items by all, open, or bought (AND) sellers, categories, or lists. You can also mark items as open or bought by tapping **Mark**

Done. Keep in mind that you can add an item more than once (to account for the fact that you might be adding the same item for different stores or lists). If you wish to purchase several units of the same item, change the quantity after you add the item(s).

Note: If you add shopping items individually, they're not automatically added to a list. If you want to add them to a list or move them to a different list, you can open the item and choose the list from the **Shopping List** field. Alternatively, add the items directly to a shopping list by tapping the **Shopping Lists** tile and then opening the list to which you wish to add items.

How to add and modify shopping items:

1. In the Shopping + Gifts topic, tap the **Shopping Items** tile.
2. Tap the plus sign to add products to your open shopping items.
3. If you do not see the item you wish to add, you can add it by tapping the product name and then tapping **No exact match. Tap to add** (this process adds a new product to your app).
4. Tap all the products you wish to add and then tap **Add**.
5. When you're finished adding items, tap **Close** to close the popup on the side.
6. You can change the details of the shopping item by tapping the shopping item, tapping **Open,** and changing the information available (Product, Buy Before, Seller, Unit Price, Unit, Comment, Quantity, Total Price, Bought, and Shopping List). **Note**: Quantity, Total Price, Bought, Shopping Lists, Comment, and Buy Before apply only to this shopping item (not the product itself or seller details).
7. You can also tap **More** to change the Product Details, Seller Details, Bookmarks, Photos, and Notes for the product (these changes are applied to the product and seller details for the product).
8. Tap **Save**.

How to sort shopping items:

You can configure categories for shopping products any way you wish, which allows you to sort your shopping items in a way that's convenient for you. For example, you could create subcategories for shopping aisles or you could create subcategories for business products. You can also sort by All, Open, or Bought.

1. In the Shopping + Gifts topic, tap the **Shopping Items** tile.

2. Select **All**, or **Open** to help you find items that are pending. (To see bought items, select **Bought**.)
3. Select **Ungrouped**, **By Seller**, **By Category**, or **By List** to sort by the all, categories, sellers, or shopping lists that you've defined.

How to mark shopping items as bought:

1. In the Shopping + Gifts topic, tap the **Shopping Items** tile or the **Shopping Lists** tile (choose a list).
2. Tap a shopping item and then tap **Mark Done**.
3. The item is crossed out.

How to remove shopping items from lists:

1. In the Shopping + Gifts topic, tap the **Shopping Items** tile.
2. Tap a shopping item and then tap **Delete**.
3. The item is removed from the shopping list; however, it remains in your Shopping Items. it is not removed from your Products.

How to delete shopping items:

1. In the Shopping + Gifts topic, tap the **Shopping Items** tile.
2. Tap a shopping item (this can be within a list or from the All Shopping Items view) and then tap **Delete**.
3. Choose **Delete**.
4. The item is removed from shopping items and the associated shopping list; however, it is not removed from your Products.

MAKING SHOPPING LISTS

Shopping lists can be used for groceries, clothing, office supplies, or items for your business. You can make multiple shopping lists and they can be used over and over again. They contain any type of products you wish to purchase. When you add shopping items to gifts, they are also compiled into a shopping list. When you create shopping lists, the products that you've added display in the All Shopping Items view (and you can sort that view by lists) as well as within your shopping list.

SHOPPING LISTS VIEW

The Shopping Lists view is the central place for managing all of your shopping lists. All the shopping lists that you've created are contained within this view.

How to add shopping lists:

1. In the Shopping + Gifts topic, tap **Shopping Lists**.
2. Tap the plus sign in the Shopping Lists view.
3. Give the shopping list a descriptive name and add a due date.
4. To add Context Tags, tap **Tap to Show Additional Data**.
5. To add iOS calendar notifications and shopping items, tap **Create and Add More Data**.
6. Tap the plus sign to add items to the shopping list.
7. Tap all the products you wish to add and then tap **Add**.
8. When you're finished adding items, tap **Close** to close the popup on the side.
9. You can change the details of the shopping list item by tapping the item, tapping **Open,** and changing the information available (Product, Buy Before, Seller, Unit Price, Unit, Comment, Quantity, Total Price, Bought, and Shopping List). **Note**: Quantity, Total Price, Bought, Shopping Lists, Comment, and Buy Before apply only to this shopping item (not the product itself or seller details).
10. You can also tap **More** to change the Product Details, Seller Details, Bookmarks, Photos, and Notes for the product (these changes are applied to the product and seller details for the product).
11. Tap **Save**.

How to remove shopping items from lists:

1. In the Shopping + Gifts topic, tap the **Shopping Lists** tile.
2. Tap a shopping list, and then tap **Delete**. Choose **Remove from List**.
3. The item is immediately removed from the list, but not deleted from your shopping items.

How to sort shopping items in lists:

1. In the Shopping + Gifts topic, tap the **Shopping Lists** tile.
2. Tap a shopping list, and then tap **Open**.
3. In the Shopping List view, select **All**, or **Open** to help you find items that are pending. (To see bought items, select **Bought**.)
4. Select **Ungrouped**, **By Seller**, or **By Category** to sort by the all, categories, sellers, or shopping lists that you've defined.

How to delete shopping lists:

1. In the Shopping + Gifts topic, tap the **Shopping Lists** tile.
2. Tap the item you wish to delete, and then tap **Delete** (or swipe to delete).

PRINTING, SHARING, AND DISCUSSING SHOPPING LISTS

You can print individual shopping lists, share shopping lists via email (e.g. for a roommate, spouse or colleague) or discuss shopping lists via social media or SMS. Users who receive a shopping list via email can manage it in their app.

How to print a shopping list:

1. Tap the **Shopping Lists** tile in the Shopping + Gifts topic.
2. In the Shopping Lists view, tap the list you wish to print and tap **Open**.
3. Tap **Actions** and then tap **Print**.
4. A PDF file is created and an alert appears asking if you wish to save the document as a local document. If so, tap **Yes**, otherwise tap **No**.
5. Tap the Share icon at the top of the view and then tap **Print**.
6. Print the document to the selected printer.

Note: You can also open the PDF document and save it to an online service, such as Dropbox, by tapping the Share icon and choosing an online service.

How to share a shopping list via email:

1. Tap the **Shopping List** tile in the Shopping + Gifts topic.
2. In the Shopping Lists view, tap the list you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient and then tap **Send** to send the email.

How to collaborate about a shopping list:

1. Tap the **Shopping List** tile in the Shopping + Gifts topic.
2. In the Shopping Lists view, tap the list you wish to discuss and tap **Open**.
3. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.
4. A message displaying, "I'm creating a shopping list (shopping list name). Any recommendations?" appears.
5. Modify the message as desired and send it.
6. If you wish to view the replies at a later time, tap **View Replies**.

How to export a shopping list to a comma-separated (CSV) file for importing into a spreadsheet:

Sometimes, you might want to export items to a CSV file for further analysis in a spreadsheet.

1. Tap the **Shopping List** tile in the Shopping + Gifts topic.
2. Tap the **Actions** button.
3. Tap **Export** and then email the CSV file to an email account.

MANAGING THINGS TO SELL

If you regularly sell items using eBay, Etsy and/or Craigslist, or if you just enjoy a simple, clutter-free environment, you'll find the Things To Sell view useful for keeping track of items that you sell. This view makes selling items convenient by allowing you to sort by Open, Sold, Seller, and Category.

How to make a list of things to sell:

1. In the Shopping + Gifts topic, tap **Things to Sell**.
2. Tap the plus sign in the Things to Sell view.
3. Select the items you wish to purchase, and then tap **Add** to add these items to the list.
4. Tap all the products you wish to add and then tap **Add**.
5. When you're finished adding items, tap **Close** to close the popup on the side.
6. You can change the details of the item by tapping the item, tapping **Open,** and changing the information available (Product, Sell By, Seller Used, Unit Price, Unit, Comment, Quantity, Total Price, and Sold). **Note**: Quantity, Total Price, Sold, Comment, and Sell Buy apply only to this item (not the product itself or seller details).
7. You can also tap **More** to change the Product Details, Seller Details, Bookmarks, Photos, and Notes for the product (these changes are applied to the product and seller details for the product).
8. Tap **Save**.

How to export "things to sell" to a comma-separated (CSV) file for importing into a spreadsheet:

Sometimes, you might want to export items to a CSV file for further analysis in a spreadsheet.

1. In the Shopping + Gifts topic, tap **Things to Sell**.
2. Tap the **Actions** button.

3. Tap **Export** and then email the CSV to an email account.

How to remove "things to sell":

1. In the Shopping + Gifts topic, tap the **Things to Sell** tile.
2. Tap the item you wish to remove, and then tap **Delete** (or) swipe to delete.
3. This action removes the item from "Things To Sell;" however, it remains as a product.

MANAGING GIFTS FOR OTHERS

Your app can help you keep track of gifts that you give to others, which is especially useful for weddings, birthdays, and other events. Once you add a shopping item to a gift, it becomes a shopping list and you can manage it like any other shopping list.

How to add gifts for others:

1. In the Shopping + Gifts topic, tap **Gifts for Others**.
2. Tap the plus sign in the Gifts for Others view.
3. Tap **Tap to set Recipient (Required)** and then select a recipient for the gift from your contacts.
4. Type an optional comment.
5. Type the amount (spend) you wish to spend and a due date (an actual amount will also be added from the cost of the shopping item).
6. Optionally, add Context Tags.
7. Tap **Create and Add More Data** to add the Shopping Item you wish to purchase.
8. Tap the **Shopping Items** tile and type or select an item for the gift and tap **Save** (optionally tap **Full Details** to add more information about the product if it is a new product).
9. If you wish you can add more items to the list, you can tap the plus sign in the **Shopping List** view.
10. Tap **Save**.

How to view shopping items for gifts:

1. In the Shopping + Gifts topic, tap the Gifts for Others tile.
2. Tap the row that contains the contact for whom you're purchasing gifts.

3. Tap **Shopping items**.
4. The Shopping List appears that contains the shopping items.

How to remove gifts for others:

1. In the Shopping + Gifts topic, tap the **Gifts for Others** tile.
2. Tap the item you wish to remove, and then tap **Delete**. (Don't worry, the contact is not removed).

MANAGING GIFTS RECEIVED

Your app can help you keep track of gifts that you receive from others, which is especially useful for keeping track of multiple gifts that you receive for weddings, birthdays, and other events.

How to add gifts you receive from others:

1. In the Shopping + Gifts topic, tap **Gifts Received**.
2. Tap the plus sign in the Gifts Received view.
3. Tap **Tap to set From (Required)** and then select the person (contact) who gave you a gift.
4. Type an optional comment.
5. Type the amount (spend) you believe was the cost of the item. (An actual amount can also be added from the shopping item you add.)
6. Optionally, add Context Tags.
7. Tap **Create and Add More Data** to add the Shopping Item you received.
8. Tap the **Shopping Items** tile and type or select an item for the gift and tap **Save** (optionally tap **Full Details** to add more information about the product). If the product currently doesn't exist in your Products, search for the name and then tap **No exact match. Tap to add** to add it.
9. If you wish you can add more items to the list, you can tap the plus sign in the **Shopping List** view.
10. Tap **Save**.

How to view shopping items for gifts:

1. In the Shopping + Gifts topic, tap the Gifts Recieved tile.
2. Tap the row that contains the contact to whom you received gifts from.
3. Tap **Shopping items**.
4. The Shopping List appears that contains the shopping items.

How to remove gifts received:

1. In the Shopping + Gifts topic, tap the **Gifts Received** tile.
2. Tap the item you wish to remove, and then tap **Delete**. (Don't worry, the contact is not removed).

MANAGING COUPONS

When you tap the **Coupons** tile, you will notice that the view it presents is a touchpoint to the **Coupons** category of the Notes + Files topic. Because coupons are a touchpoint to the Notes + Files topic, the Category of "Coupons" is automatically added to any coupons that you add through the Shopping + Gifts topic.

For stores that take electronic coupons, you can add a photo of the coupon or add a bookmark to an online coupon. You can add reminders for the coupons to let you know that you need to use the coupons before they expire.

Refer to Notes to learn more about creating Coupons.

MANAGING SELLERS

When you tap the **Sellers** tile, you will notice that the view it presents is a touchpoint to the **Sellers** category of the People + Services topic. Because sellers are a touchpoint to the People + Services topic, the Category of "Sellers" is automatically added to any sellers that you add through the Shopping + Gifts topic.

Refer to Service Providers to learn more about creating Sellers.

ASSOCIATING ITEMS WITH PRODUCTS, GIFTS RECEIVED, COUPONS, AND SELLERS

The Shopping + Gifts topic helps you to be more productive by allowing you to associate tasks, checklists, appointments, reminders, and other items to products, gifts received, coupons, and sellers. For example, if you've received gifts for your wedding, you can associate reminders or tasks to help you manage your thank you notes. Or you might want to associate an online coupon (as a bookmark) to a "coupon" in the app.

How to associate a task with a product, gift, coupon, or seller:

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select an item that you want to associate it with.

1. Locate a product, gift, coupon or seller by tapping the appropriate tile in the Shopping + Gifts topic.

2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a checklist with a product, gift, coupon, or seller:

1. Locate a product, gift, coupon or seller by tapping the appropriate tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate an appointment with a product, gift, coupon, or seller:

1. Locate a product, gift, coupon or seller by tapping the appropriate tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.

6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with a product, gift, coupon, or seller:

1. Locate a product, gift, coupon or seller by tapping the appropriate tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a bookmark with a product, gift, coupon, or seller:

1. Locate a product, gift, coupon or seller by tapping the appropriate tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate a file reference with a product, gift, coupon, or seller:

1. Locate a product, gift, coupon or seller by tapping the appropriate tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate photos, audio, drawings, or video with products or sellers:

1. Locate a product or seller by tapping the **Products** or **Sellers** tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the item.

For detailed information about creating media items, refer to the Media help.

How to associate a note (or coupon) with a product or seller:

1. Locate a product or seller by tapping the **Products** tile or the **Sellers** tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate a service with a seller:

1. Locate a seller by tapping the **Sellers** tile in the Shopping + Gifts topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing service item, tap **Service** and select the service you want to add by tapping it.
5. If you're adding a new service, tap **Service** and add the necessary information for the service.
6. Add other optional information.
7. Tap **Save**.

Events + Appointments

WHAT CAN I DO HERE?

The Events + Appointments topic enables you to manage all the information related to events you're attending and hosting (such as meetings or parties); appointments (items that occur as designated times, such as doctor's appointment); reminders; occasion reminders; iOS calendar items; and iOS reminders. For example, from this view, if you're planning a meeting or party you can create an event, choose the invitees for the event, and email the invitees (directly from the view). When you organize an event such as a wedding in your LightArrow app, you can organize items such as bookmarks to wedding planning websites; tasks for things to do related to your wedding; locations related to your appointments; service providers, such as bakers, caterers, and flower shops; and travel related items for your honeymoon. In addition, when party planning, you can mark the invitees who plan to attend and the invitees who have declined the invitation. This is especially useful for weddings and other formal events; for example, if you've mailed invitations and you need a way to keep track of the invitees who plan to attend, your app can provide you with this ability.

GLOSSARY OF TERMS

Attending Event: An attending event is an event that you're attending, such as a wedding, birthday party, open house, meeting, etc. Unlike appointments, events allow associations with other items, such as tasks, checklists, files, etc.

Hosting Event: A hosting event is an event that you're planning, such as a wedding, birthday party, open house, meeting, etc. Unlike appointments, events allow associations with other items, such as tasks, checklists, files, etc.

Appointment: A doctor's visit, meeting, lunch meeting, or other lightweight scheduled item.

Reminder: A one-time item to remind you when something is to occur or a time-sensitive item that you need to be reminded of, such as a reminder to call your grandmother or to pick up your spouse's dry cleaning.

Occasion Reminder: A one-time or yearly item to remind you when something is to occur, such as a festival that you wish to attend.

iOS Calendar Item: Calendar items that are accessed on your iPhone, iPad, or iPod touch. You can view these calendar items directly from this view or on your iOS calendar.

iOS Reminder: Reminders that are accessed on your iPhone, iPad, or iPod touch. You can view these reminders directly from this view.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Events, the People + Services, and Travel + Places topics. For example, if you have outings you want to plan as part of a trip you're taking, you can define this outing directly from within Travel + Places and it will show up as an outing in Events. Or, if a service provider for one of your events already exists in People + Services, you can link to them directly, eliminating the need to re-enter their information. You might also have appointments that you set up from many places in the app that you can view from Events + Appointments.

CATEGORIES FOR EVENTS + APPOINTMENTS

Categories are available for use with Events. You can create, modify, hide, or delete categories via Settings or directly from a tile for an Event. When a category is deleted, it is completely removed from your app. When a category is hidden, it no longer appears in the Categories tile, but it remains defined, and is still available in the category list when you are defining a new Event. Note that categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden. For information about creating categories, refer to your help for Manage Categories.

ALERTS

Alerts display at the top of the Events + Appointments view for anything related to events or appointments that are due within the next five days or currently

overdue. For example, if you've set an appointment to go to lunch with friends, it will appear in the Alerts section when it's due.

LOCAL NOTIFICATIONS

Local notifications will also alert you to events, occasions, and appointments (other) depending upon the reminders that you've set up in My Settings.

EVENT CALENDAR

The Event Calendar shows a subset of items that you would see on "My Calendar." It includes Events (Attending and Hosting), Appointments, Reminders, Occasion Reminders, iOS Calendar Items, and iOS Reminders.

To learn more about using calendars, refer to My Calendar.

EVENTS

How to add an Attending Event:

1. Tap the plus sign in the Events + Appointments view.
2. Select **Attending Event**.
3. To quickly create an event, type a name that describes the event and a date and then tap **Save**.
4. If you want to add more details to the event, tap **Full Details**.
5. Optionally, type a comment.
6. You can modify the start date and add an end date by tapping the **Dates** tile and selecting the dates. Tap **Set**.
7. To add co-hosts for the event, tap the **Co-Hosts** tile, tap the add icon, select one or more person(s), and tap **Save**.
8. To add invitees for the event, tap the **Invitees** tile, tap the add icon, select one or more person(s), and tap **Save**.
9. You can select a category, such as "Birthdays," by tapping the Category tile. If the categories aren't appropriate for the event, you can create a new category by tapping the plus sign. Tap **Save** when you are finished.
10. If you wish to add context tags, tap the **Context Tags** tile, select a tag, and tap **Set**. If you wish to create a new tag, tap **New**.
11. If you wish to change the iOS calendar that this event is associated with (the default is selected), then tap **Specify iOS Calendar** and choose a calendar.
12. If you wish to add a location for the event, tap the **Location** tile.

13. Tap **Save**.

How to add a Hosting Event:

1. Tap the plus sign in the Events + Appointments view.
2. Select **Hosting Event**.
3. To quickly create an event, type a name that describes the event and a date and then tap **Save**.
4. If you want to add more details to the event, tap **Full Details**.
5. Optionally, type a comment.
6. You can modify the start date and add an end date by tapping the **Dates** tile and selecting the dates. Tap **Set**.
7. To add co-hosts for the event, tap the **Co-Hosts** tile, tap the add icon, select one or more person(s), and tap **Save**.
8. To add invitees for the event, tap the **Invitees** tile, tap the add icon, select one or more person(s), and tap **Save**.
9. You can select a category, such as "Birthdays," by tapping the Category tile. If the categories aren't appropriate for the event you can create a new category by tapping the plus sign. Tap **Save** when you are finished.
10. If you wish to add context tags, tap the **Context Tags** tile, select a tag, and tap **Set**. If you wish to create a new tag, tap **New**.
11. If you wish to change the iOS calendar that this event is associated with (the default is selected), then tap **Specify iOS Calendar** and choose a calendar.
12. If you wish to add a location for the event, tap the **Location** tile.
13. Tap **Save**.

When you create events, it's easy to communicate with the co-hosts and invitees by following the procedure below:

1. Open the event by tapping the **Events** tile and tapping the event.
2. Tap the **Co-hosts** or **Invitees** tile and tap the Email icon.
3. Tap **Email All**.
4. Write and send the email (such as an invitation or a communication regarding the meeting or party).

When you create events, you can keep track of the invitees who have responded to your invitation by following the procedure below:

1. Open the event by tapping the **Events** tile and tapping the event.
2. Tap the **Invitees** tile.
3. Tap the **More** icon next to name of the invitee. Choose **Not responded**, **Yes**, **No**, or **Maybe** and add the number of guests. Tap **Set**. The Invitees view keeps a tally of the number of guests who plan to attend.

Note: You can also open contact(s) and contact them directly (through social media, SMS, or email) from the Invitees or Co-hosts views.

PRINTING, SHARING, AND DISCUSSING EVENTS

You can print individual events, share events via email or discuss events via social media or SMS. Users who receive an event via email can manage it in their LightArrow app.

How to print an event:

1. Tap the **Events** tile in the Events + Appointments topic.
2. Tap the event you wish to print and tap **Open**.
3. Tap **Actions** and then tap **Print**.
4. A PDF file is created and an alert appears asking if you wish to save the document as a local document. If so, tap **Yes**, otherwise tap **No**.
5. Tap the Share icon at the top of the view and then tap **Print**.
6. Print the document to the selected printer.

Note: You can also open the PDF document and save it to an online service, such as Dropbox, by tapping the Share icon and choosing an online service.

How to share an event via email:

1. Tap the **Events** tile in the Events + Appointments topic.
2. Tap the event you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient and then tap **Send** to send the email.

How to collaborate about an event:

1. Tap the **Events** tile in the Events + Appointments topic.
2. Tap the event you wish to collaborate about and tap **Open**.
3. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.

4. A message displaying, "I'm planning an event (event name). Any recommendations?" appears.
5. Modify the message as desired and send it.
6. If you wish to view the replies at a later time, tap **View Replies**.

PHOTOS

When you create events, you can associate a photo icon with the event.

Refer to Photos to learn more about adding photo icons to events.

APPOINTMENTS

How to add an Appointment:

1. Tap the plus sign in the Events + Appointments view.
2. Select **Appointment**.
3. To quickly create an appointment, type a name that describes the appointment and a date and then tap **Save**.
4. If you want to add more details to the appointment, tap **Full Details**.
5. Optionally, type a comment.
6. You can modify the start date and add an end date by tapping the **Dates** tile and selecting the dates. Tap **Set**.
7. To add invitees for the appointment, tap the **Invitees** tile, tap the add icon, select one or more person(s), and tap **Save**.
8. If you wish to add context tags, tap the **Context Tags** tile, select a tag, and tap **Set**. If you wish to create a new tag, tap **New**.
9. To associate a topic with the appointment, tap the **Associate Topic** tile and select a topic. For example, you can associate a service provider for a company or doctor.
10. To associate a contact with the appointment, tap the **Associated Contact** tile and select a contact (company or person you are meeting with).
11. If you wish to add the Location, tap the Location tile.
12. If you wish to change the iOS calendar that this appointment is associated with (the default is selected), then tap **Specify iOS Calendar** and choose a calendar).
13. If you wish make this a recurring appointment, tap **Not set to repeat**. See Repeat Schedules to learn more.

14. Tap **Save**.

When you create appointments, it's easy to communicate with the person(s) you're meeting with:

1. Tap the appointment from the calendar or from the Events + Appointments topic.
2. Tap the **Invitees** or **Associated Contact** tiles. For Associated Contacts, tap **Show Association**.
3. For contacts, tap **Call**, **Email**, **Text, Message**, or **Tweet**.
4. For invitees, tap the Email icon and select **Email All**.

REMINDERS

How to add an Occasion Reminder:

You can add a reminder in your LightArrow app that reminds you of occasions such as Valentine's Day, Anniversaries, and Birthdays by following the procedure below:

1. In the Events + Appointments view, tap the plus sign and select **Occasion Reminder**.
2. To quickly create an occasion reminder, type a name that describes the reminder and a date and then tap **Save**.
3. If you want to add more details (such as a recurring reminder) to the reminder, tap **Full Details**.
4. From the **Remind** field, choose **Once** or **Every Year**. **Every Year** reminds you for the next five years.

How to add an iOS Reminder:

You can add iOS reminders that you can manage directly through your device's Reminders app by following the procedure below:

1. In the Events + Appointments view (or through your Quick Add panel), tap the plus sign and select **iOS Reminder**.
2. In the New Device Reminder view, select a date and/or date/time to be reminded from the **Remind me on** field.
3. Choose whether or not the reminder is completed.
4. Choose from your list of iOS Reminders from the **List** field.
5. Add any notes or description of the reminder in the **Notes** field.
6. Tap **Save**.

Learn more about LightArrow app general reminders at Reminders.

IOS CALENDAR EVENTS

You can add iOS calendar events in your LightArrow app that you can manage directly through an external calendar application or iOS calendar. If you use this feature, any invitees will automatically receive an invitation via email.

1. In the Events + Appointments view, tap the plus sign and select **iOS Calendar item**.
2. The standard Apple Add Event window appears where you can add the details and invitees for the event.

ASSOCIATING ITEMS WITH EVENTS

The Events + Appointments topic helps you to be more productive by allowing you to associate tasks, shopping items, checklists, appointments, reminders, notes, checklists, files, bookmarks, expenses, and media items to events. For example, if you're planning a wedding, you might set up appointments with your wedding planners and other service providers and you'll want to be able to easily see all your appointments associated with the wedding in one place. By associating appointments with the wedding event, you have a central location to view these appointments.

How to associate a task with an event:

You can associate an event with a task or a task with an event.

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select an event that you want to associate it with.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a shopping item with an event:

You can create a shopping item Shopping + Gifts topic and later associate it with an event in the Events + Appointments topic (or) you can add a shopping item directly in the Events + Appointments topic. For detailed information about shopping items, refer to the Shopping + Gifts help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing shopping item, tap **Shopping Item** and select the shopping item you want to add by tapping it.
5. If you're adding a new shopping item, tap **Shopping Item** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

How to associate an appointment with an event:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to an event, follow the procedure below.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with an event:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to an event, follow the procedure below.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a note with an event:

You can create a note in the Notes + Files, Lists topic and associate it with an event (or) you can associate a note to an event directly from the Events + Appointments topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate a checklist with an event:

You can create a checklist in the Notes + Files, Lists topic and associate it with an event in the Events + Appointments topic (or) you can associate a checklist to an event directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes + Files, Lists help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate a file reference with an event:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with an event (or) you can associate a file reference to an event directly in the Events + Appointments topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate a bookmark with an event:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Events + Appointments topic (or) you can associate a bookmark to a Events + Appointments topic directly from the Events + Appointments topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate an expense with an event:

You can create an expense in the Finances topic and associate it with an event (or) you can associate an expense to an event directly from the Events + Appointments topic. For detailed information about expenses, refer to the Finances help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.
5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

How to associate photos, audio, drawings, or video with an event:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in Events + Appointments (or) you can associate a media item with an event directly from

the Events + Appointments topic. For detailed information about creating media items, refer to the Media help.

1. Locate an event by tapping the **Events** tile in the Events + Appointments topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the event.

Travel + Places

WHAT CAN I DO HERE?

The Travel + Places topic enables you to manage information for all the trips you plan to take, visitors you will be receiving, and places you frequent or just want to remember. For example, if you're planning to take a trip to go bird watching, you can plan your daily agenda and packing lists through checklists; set locations for the bird watching areas you wish to visit for better geographical planning; add photos and videos of the birds you've seen as media attachments or as a note; add bookmarks to travel and weather sites; and share travel-related information instantly with friends and family. If you want to manage guests coming to your home or business, you can manage the places you wish to visit with them; expenses related to the visit; reminders about the visit; media, such as video or photos; notes pertaining to the visit; and more. For trips and visits, you can also add companions, which enables you to share details of the trip or visit with the group all at once via social media, text message, or email. When traveling with others for work or leisure, this makes communicating with the group easy.

GLOSSARY OF TERMS

Trip: An area you plan to go, such as a trip for leisure or business. Can be as small as the grocery store or as big as the Taj Mahal.

Place: A place can be a location such as Mavericks Beach on a trip to California. This is a touchpoint to the Places subcategory of the Travel + Places category of Service Providers in the People + Services topic.

Visitor: A person who will be visiting you at your business or residence.

Travel Notes: Any notes related to travel. Could be a travel journal, notes (including text audio, video, photos, or drawings) about a place you're visiting or notes from a conference that you're attending.

Travel Bookmarks: Bookmarks to travel-related websites. You can also manage your logins and passwords to travel and airline sites to make finding itineraries and boarding passes convenient.

Travel Services: Any services that might be required for travel, such as transportation, parking, or hotel spa services.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Travel + Places and other topics. For example, if you have a restaurant defined as a service provider in the People + Services topic, you can choose that restaurant as a place you wish to take a visitor from Travel + Places. Or if you want to plan an outing that will include other people, you can define that outing in Travel + Places and, via the touchpoint to Events + Appointments, it will show up as an event in Events + Appointments. Or, if you have travel- or visitor-related resources such as online documents that are defined in Notes + Files, Lists, you can access those resources directly from Travel + Places. And shopping items and tasks required for a trip or a visit can be defined in Travel + Places and will appear in Shopping + Gifts and Trips + Visitors, respectively.

ALERTS

Any travel-related item that's open and due in the future for five days appears in the Alerts section of the Travel + Places view.

LOCAL NOTIFICATIONS

Local notifications will also alert you to travel-related items depending upon the reminders that you've set up in My Settings.

TRIPS AND VISITORS (NEW TRIP / TRIP VIEW / VISITOR VIEW / NEW VISITOR)

A trip is an area you plan to go, such as a trip for leisure or business. It can be as small as the grocery store or as big as the Taj Mahal. A visitor is a person who will be visiting you at your business or residence. Trips and visitors typically have places and companions associated with them. You can set a location for a trip or

visitor or you can associate places with the trip or visitor that have associated locations.

In your LightArrow app, you can associate several types of items to trips and visitors in order to efficiently plan, and to organize in a way that you can easily find the information that you need. For example, you can associate tasks, checklists, appointments, expenses, shopping items, files, and other items with trips and visitors.

How to group trips and visitors:

There is one selector at the top-left of the Trips + Visitors view. It allows you to group by all trips or visitors or by starting date, last updated, or context tag.

1. In the Trips + Visitors view, tap the selector at the top-left of the view.
2. From the selector, choose Ungrouped, Starts, Last Updated, or Context Tags. The app remembers the previous selection.

CREATING TRIPS AND VISITORS

How to create a new trip:

1. In the Travel + Places topic, tap the plus sign and then select **Trip**.
2. To quickly create a trip, type a name and start date, and then tap **Save**.
3. Optionally, tap **Full Details** to add more information to the trip.
4. Select dates for the trip by tapping the **Dates** tile and selecting dates from the selector. Tap **Set**.
5. Select a place for the trip by tapping the **Places** tile and then tapping the add selector at the top. When the **Select Places** view appears, select a place or add a new one by tapping the plus sign. Return to the Trip view. (Places are managed as Service Providers and can be hotels, restaurants, parks, etc.)
6. To add trip companions, tap the **Companions** tile and select companions from your contacts. Tap the add selector at the top. When the Companions view appears, select companions. Then return to the Trip view. Learn more about Companions below.
7. To add context tags, tap the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
8. If you wish to change the iOS calendar that the trip is associated with, tap the **iOS Calendar** tile and then select **Specify iOS Calendar**.

9. To add a location for the trip, tap **Location** and select one of the options. Optionally, add more data by tapping **Create and Add More Data**. This allows you to associate additional items, such as Tasks, Checklists, Expenses, etc.
10. Tap **Save**.

How to create a new visitor:

1. In the Travel + Places topic, tap the plus sign and then select **Visitor**.
2. To quickly create a visitor, type a name and start date, and then tap **Save**.
3. Optionally, tap **Full Details** to add more information to the visitor.
4. Select dates for the visitor by tapping the **Dates** tile and selecting dates from the selector. Tap **Set**.
5. Select a place for the visitor by tapping the **Places** tile and then tapping the add selector at the top. When the **Select Places** view appears, select a place or add a new one by tapping the plus sign. Return to the Trip view. (Places are managed as Service Providers and can be hotels, restaurants, parks, etc.)
6. To add visitor companions, tap the **Companions** tile and select companions from your contacts. Tap the add selector at the top. When the Companions view appears, select companions. Then return to the Trip view. Learn more about Companions below.
7. To add context tags, tap the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
8. If you wish to change the iOS calendar that the visitor is associated with, tap the **iOS Calendar** tile and then select **Specify iOS Calendar**.
9. To add a location for the visitor, tap **Location** and select one of the options. Optionally, add more data by tapping **Create and Add More Data**. This allows you to associate additional items, such as Tasks, Checklists, Expenses, etc.
10. Tap **Save**.

MODIFYING TRIPS AND VISITORS

How to modify a trip or visitor:

1. Tap the **Trips + Visitors** tile in the Travel + Places topic.
2. Tap the trip or visitor you wish to modify and then tap **Open**.
3. Modify the items as directed.

4. Tap **Save**.

DELETING TRIPS

How to delete a trip or visitor:

1. Tap the **Trips + Visitors** tile in the Travel + Places topic.
2. Tap the trip or visitor you wish to delete to expand the row, and then tap **Delete**.

TRIP COMPANIONS

How to add trip companions (to trips or visitors):

1. Tap the **Trips + Visitors** tile in the Travel + Places topic.
2. Choose a trip or visitor and open it.
3. Tap the **Companions** tile.
4. Tap the Add icon, tap the contacts you wish to include, and then tap **Save**.
5. You can manually keep track of contacts who have accepted your invitation by tapping the More Info icon and choosing **Not responded**, **Yes**, **No**, or **Maybe** and then tapping **Set**. When they respond, this groups the companions by their response.
6. Return to the Trip or Visit and then save it.

Note: You can communicate with all of these trip/visit companions by tapping **Share** from the associated Trip, and then tapping **Email** or **Text Message**.

How to remove trip companions from a trip/visit:

If you wish to remove a companion from a trip or visit, in the Companions view, swipe the companion to the left to remove them.

PRINTING, SHARING, AND DISCUSSING TRIPS AND VISITORS

You can print individual trips or visits, share trips or visits via email or discuss trips or visits via social media or SMS. Users who receive a trip or visit via email can manage it in their app.

How to print a trip or visit:

1. Open the trip or visit.
2. Tap the trip or visit you wish to print and tap **Open**.
3. Tap **Actions** and then tap **Print**.

4. A PDF file is created and an alert appears asking if you wish to save the document as a local document. If so, tap **Yes**, otherwise tap **No**.
5. Tap the Share icon at the top of the view and then tap **Print**.
6. Print the document to the selected printer.

Note: You can also open the PDF document and save it to an online service, such as Dropbox, by tapping the Share icon and choosing an online service.

How to share a trip or visit via email:

1. Open the trip or visit.
2. Tap the trip or visit you wish to share and tap **Open**.
3. Tap **Share** and then tap **Email**.
4. Choose a recipient and then tap **Send** to send the email.

How to collaborate about a trip or visit:

1. Tap the trip or visit you wish to collaborate about and tap **Open**.
2. Tap **Share** and then tap **Post**, **Tweet** or **Text Message**.
3. A message displaying, "I'm planning a trip/visit (trip or visit name). Any recommendations?" appears.
4. Modify the message as desired and send it.
5. If you wish to view the replies at a later time, tap **View Replies**.

CREATING PLACES

In your LightArrow app, Places are Service Providers.

Refer to Service Providers for more information about creating places.

CREATING TRAVEL NOTES

Refer to Notes for more information about creating notes.

CREATING TRAVEL BOOKMARKS

Refer to Bookmarks for more information about creating bookmarks.

CREATING TRAVEL SERVICES

Refer to Services for more information about creating services.

ASSOCIATING ITEMS WITH TRIPS OR VISITS

The Travel + Places topic helps you to be more productive by allowing you to associate tasks, shopping items, appointments, reminders, bookmarks, notes, checklists, files, bookmarks, expenses, audio, photos, video, and drawings to

trips and visits. For example, if you're planning a trip to Maui, you might attach photos during the trip, a packing list (through a checklist), and bookmarks to websites with itinerary or reservation information; and you'll want to be able to easily see all of these items associated with the trip in one place. By associating these items with the trip, you have a central location to view all of this data.

How to associate a task with a trip/visit:

You can associate a trip/visit with a task or a task with a trip/visit.

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select a trip/visit that you want to associate it with.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a shopping item with a trip/visit:

You can create a shopping item Shopping + Gifts topic and later associate it with a trip/visit in the Travel + Places topic (or) you can add a shopping item directly in the Travel + Places topic. For detailed information about shopping items, refer to the Shopping + Gifts help.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing shopping item, tap **Shopping Item** and select the shopping item you want to add by tapping it.
5. If you're adding a new shopping item, tap **Shopping Item** and add a name, amount, and due date/time.
6. Add other optional information.

7. Tap **Save**.

How to associate an appointment with a trip/visit:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a trip/visit, follow the procedure below.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with a trip/visit:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to a trip/visit, follow the procedure below.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.

6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a note with a trip/visit:

You can create a note in the Notes + Files, Lists topic and associate it with a trip/visit (or) you can associate a note to a trip/visit directly from the Travel + Places topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate a checklist with a trip/visit:

You can create a checklist in the Notes + Files, Lists topic and associate it with a trip/visit in the Travel + Places topic (or) you can associate a checklist to a task directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes +Files, Lists help.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.

7. Complete the information for the checklist and tap **Save**.

How to associate a file reference with a trip/visit:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with a trip/visit (or) you can associate a file reference to a trip/visit directly from the Travel + Places topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate a bookmark with a trip/visit:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Travel + Places topic (or) you can associate a bookmark to a Travel + Places topic directly from the Travel + Places topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate an expense with a trip/visit:

You can create an expense in the Finances topic and associate it with a trip/visit (or) you can associate an expense to a trip/visit directly from the Travel + Places topic. For detailed information about expenses, refer to the Finances help.

1. Locate a trip/visit by tapping the **Trips + Visitors** tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.
5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

How to associate photos, audio, drawings, or video with a trip/visit:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in Travel + Places (or) you can associate a media item with a trip/visit directly from the Travel + Places topic. For detailed information about creating media items, refer to the Media help.

1. Locate a trip/visit by tapping the Trips + Visitors tile in the Travel + Places topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the trip/visit.

People + Services

WHAT CAN I DO HERE?

The People + Services topic is ideal for managing your contacts and services. This view is useful for anyone who wants to manage details of their contacts, and its especially useful for business people for keeping track of clients, prospects, service providers or other types of contacts. When you have several contacts, it's difficult to find their information quickly and efficiently. In this view, you can organize your contacts into groups, such as "Friends," "Family," "Clients," "Prospects," "Students" -- whatever works for your life or business, which makes it easier to manage a large number of contacts. Keep in mind, that by giving your LightArrow app access to your iOS contacts, there's no need to manage your contacts in your device's app AND in your LightArrow app. You can import the contact information for a new contact directly from your iOS contacts or link the information to an iOS contact.

It's challenging to manage all the service providers and services that you utilize occasionally or on a regular basis. For example, you might use the services of hair stylists, gardeners, advertising and PR agencies, auto repair shops, and others. Many people keep the details of the services and service providers by saving receipts in a file folder or saving or scanning business cards; however, it can be difficult to locate this information when you need it, and this method produces a lot of clutter. For example, you might have an air conditioning system that requires regular maintenance. With your LightArrow app, you can maintain and easily retrieve the contact information of the businesses and people who maintain your air conditioning system. Not only can you save the contact information -- you can create a maintenance schedule; create reminders for services through integration with your device's calendar; keep notes, files, photos, and videos associated with the service; bookmark online information; add checklists for things to remember; and more. Essentially, all the information you need about a contact or service is kept in one place -- which saves your precious time.

NOTES ABOUT IN-APP PURCHASES

The Pro Contacts pack adds CRM-like contact management features, including custom forms for contacts, a configurable contact grid view, and CSV import/export. It also allows data items such as tasks, appointments, reminders, notes, files, bookmarks, and expenses to be associated with contacts.

Purchase extra contacts in packs of 100, 200, 500, 1000, or 2000. Out of the box, you can manage 100 contacts. These packs are cumulative. For example, if

you purchase the 100 pack and the 200 pack at a later time, you can manage a total of 400 contacts (with the out-of-box contacts).

GLOSSARY OF TERMS

Contacts: Friends, family members, businesses, clients, or other people or entities you communicate with frequently or infrequently.

Groups: This is the name for a group of contacts. It can contain multiple people or businesses, and enables you to contact them via email or text all at once.

iOS Contacts: Contacts that are accessed on your iPhone, iPad, or iPod touch. You can view these contacts directly from this view.

Service Providers: Companies, organizations, or individuals from whom you receive a service. For example, AT&T may be the company that provides your mobile telephone service, State Farm insures your car, you stream movies from Netflix, or Dr. Welby is your personal physician.

Services: Work or help that you receive from others such as personal care, auto care, home maintenance, contract work, etc.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between People + Services and other topics. For example, if you have services you want to use for events you're planning, you can specify the services directly from within Events + Appointments and that information will automatically be available from within People + Services. The same is true for project services that you define in Tasks + Projects -- services you receive for your home and other possessions defined in Home + Assets; services you consume for your learning activities in Education; online services you access, and so on. You can even specify your healthcare service providers from within Health + Goals and the establishments you like to frequent from within Travel + Places. In addition, you can create contacts automatically from My Inboxes when you're gathering information from social, web, and email channels.

CATEGORIES FOR SERVICE PROVIDERS AND SERVICES

Categories are available for use with service providers and services. You can create, modify, hide, or delete categories via Settings or directly from a tile for a Service Provider or Service. When a category is deleted, it is completely removed from your app. When a Service Provider category is hidden, it no longer appears in the **Categories** tile, but it remains defined, and is still available in the category list when you're defining a new Service Provider or Service. Note that categories that are in use or serve as touchpoints to another

topic cannot be deleted or hidden. For information about creating categories, refer to your help for Manage Categories.

ALERTS

Alerts display at the top of the People + Services view for anything related to contacts, services and service providers that are due within the next five days or are currently overdue. For example, if you've set a birthday date for any of your contacts, an alert displays to let you know that a birthday is coming or overdue. Or, if you've created a reminder to set up a yearly eye exam, an alert shows.

MANAGING CONTACTS

To learn more about managing contacts, refer to Contacts.

iOS CONTACTS VIEW

iOS contacts are contacts that are accessed on your iPhone, iPad, or iPod touch from your built-in contacts app. You can view these contacts directly from the iOS Contacts view, which is accessed by tapping the iOS Contacts tile from the People + Services view.

CREATING GROUPS OF CONTACTS (GROUPS VIEW)

In the People + Services topic, a “group” is a convenient way to maintain a logical collection of related people from your device’s contact's app. Groups allow you to organize your contacts into segments, such as "Friends," "Family," "Clients," "Prospects," "Students" -- whatever works for your life or business, which makes it easier to manage a large number of contacts. It's also useful to create groups of contacts when you need to communicate with the entire group via email or text.

Note: It's a good idea to add contact groups before adding contacts from your IOS contacts because it allows you to import multiple contacts from your device all at once.

How to add contact groups:

Your LightArrow app includes basic contact groups, which you can modify or remove. You can add new contact groups and members of the group by following the procedure below:

1. In the People + Services topic, tap the plus sign, and then tap **Group**.
2. Add a name for the group.
3. If you wish to add more data, such as members of the group tap **Create and Add More Data**.

4. Tap **Members**, and then select all the users you wish to add to the group by tapping them.
5. Tap **Save**.

How to modify and add contacts to groups:

For your convenience, you can add contacts to groups in several ways, such as from the person's Contacts view or directly from the Groups view.

1. In the People + Services topic, tap the **Groups** tile.
2. Locate the group that you want to add members to, tap it, and then tap **Open**.
3. If you wish to modify the title, tap it to edit it.
4. Tap **Members**, and then select all the users you wish to add to the group by tapping them.
5. Tap **Save**.

How to delete contact groups:

You cannot delete a group if you've associated items with it. You can delete groups by following the procedure below:

1. In the People + Services topic, tap the **Groups** tile.
2. Locate the group you wish to delete and tap it.
3. Tap **Delete**.

INTERACTING WITH CONTACTS AND GROUPS OF CONTACTS

The People + Services view increases your productivity by allowing you to interact directly with your contacts while in context with the items that are associated with them. For example, you might be viewing a task that is directly associated with a contact, but you're not required to leave the app to contact this person while your thinking about this important task. Through your LightArrow app, you can call, email, or send a text message directly from the contact. In addition, if you want to communicate with a group of contacts at once (such as invitees to a party), your LightArrow app makes it easy to do so.

How to call, email, or send a text message to a contact:

1. In the People + Services view, tap the **Contacts** tile.
2. Locate the contact you wish to communicate with, and tap it.
3. Tap **Call**, **Email**, or **Text**, depending on the communication.
4. Finish the process by completing the fields.

How to email or send a text message to a group of contacts:

1. In the People + Services view, tap the **Groups** tile.
2. Locate the group you wish to communicate with, and tap it.
3. Tap **Email** or **Text**, depending on the communication.
4. Finish the process by completing the fields.

CREATING SERVICE PROVIDERS

Refer to Service Providers to learn more about creating Service Providers.

CREATING SERVICES

Refer to Services to learn more about creating Services.

CUSTOM LOG FORMS

To better manage your contacts, you can add custom fields and log forms to their contact records. For example, imagine that you're a personal trainer and you're managing a large number of clients. You want to make sure that they're progressing; therefore, with custom fields, you can track their weight and other stats directly in their contact record. If you wish to combine custom items, you can create a log form and combine the items together.

CONCEPTUAL EXAMPLE: When you create custom fields, you have to create a form and include them. The form makes those available in the Contact detail. For example, you may have a form called "Personal Info" and include the fields "Married" and "Number of Children" in it. You may have another form called "Deal Info" and have the fields "Deal Size" and "Likelihood" in it. When you open a Contact detail view, you'll now see two additional tiles in it called "Personal Info" and "Deal Info" — in each one you can set the corresponding field values. Currently, all Forms are available to each Contact.

How to create custom fields (Contact Log Items):

1. In the People + Service topic, tap the **Custom Log Forms** tile.
2. Tap the plus sign and select **Contact Log Item**.
3. Add a name that describes the field, such as Height.
4. Optionally, add a comment.
5. Add a response type (such as numeric, text, date, etc.), and unit (such a minutes, weight, etc.).
6. Optionally, add a target value (for example, ideal weight, ideal measurements, lead score for sales leads, etc.)

7. Optionally, add a default value (adding this value will save you time when entering values that don't change often.)
8. From the **Show as Summary** field, select how you want to view the data (most recent, daily total, etc.)
9. Optionally add a context tag.
10. Tap **Save** and repeat the process for additional fields.
11. The field is now available for contacts.

How to add log items to a log form (Contact Log Form):

1. In the People + Service topic, tap the **Custom Log Form** tile.
2. Tap the plus sign and then select **Contact Log Form**.
3. Add a name that describes the form and an optional comment.
4. To add the log items that you created in the previous steps, tap **Tap to add Log Item**.
5. Select the fields that you created in the previous procedure.
6. Tap **Save**.

The form is now available for each contact in the People + Services topic and the name of the form created in the procedure above becomes a new tile that you will see for each contact. The log items for the form are available for you to track for each contact.

How to modify custom contact items:

1. In the People + Service topic, tap the **Custom Log Forms** tile.
2. Locate the custom field you wish to modify (**Log Items**) and tap it.
3. Tap **Configure** and modify the items as necessary and tap **Save**.

How to modify custom log forms:

1. In the People + Service topic, tap the **Custom Log Forms** tile.
2. Locate the Log Form you wish to modify and tap the form.
3. If you want to remove fields, swipe them to delete them.
4. If you want to add fields, tap the plus sign, select the fields you wish to add, and then tap **Save**.
5. If you want to reorder fields, tap the Reorder icon and drag the fields up or down.

6. Tap **Save**.

How to delete custom log forms or items:

1. In the People + Service topic, tap the **Custom Log Forms** tile.
2. For custom fields, locate the custom log item you wish to delete, tap it, and then tap **Delete**.
3. For custom forms, locate the custom log form you wish to delete, tap it, and then tap **Delete**.
4. Confirm the deletion.

ASSOCIATING ITEMS WITH CONTACTS, SERVICE PROVIDERS AND SERVICES

In the People + Services topic, the Contacts view helps you to be more productive by allowing you to associate tasks, reminders, appointments, notes, expenses, files, and bookmarks (to websites) to contacts. For example, if you're an Account Executive and you wish to keep notes about prospects you're working with, you can create the notes in your LightArrow app, and associate them with the prospect. Or perhaps you're taking care of an elderly loved one, and you need to keep track of expenses related to their care. In this case, you can attach expenses to this contact.

In the People + Services topic, the Service Providers view helps you to be more productive by allowing you to associate tasks, checklists, appointments, reminders, bookmarks (to websites), files, audio, photos, videos, drawings, notes, and services with service providers. For example, if you've hired a landscaping firm, and you have a list of things you wish to talk to them about, you might associate a checklist to the service provider. Or, if you've hired them to do many jobs, each of the jobs might be an attached service.

In the People + Services topic, the Services view helps you to be more productive by allowing you to associate tasks, checklists, appointments, reminders, bookmarks (to websites), files, audio, photos, videos, drawings, notes, and expenses to services. For example, if you've hired a babysitter to watch your children, you might associate a note about the experience or a receipt that you've saved in Dropbox or Box.

Associating Services and Service Providers

When a service provider performs a service for you, it's a good idea to link the service provider to the service in the People + Services topic. You can add the service to the service provider or add the service provider to the service. The following procedures explain how:

How to link a service provider to a service:

1. Locate or create the service from the **Services** view by tapping the **Services** tile in the People + Services topic and tapping the plus sign.
2. Open the Service by tapping it and then tapping **Open**.
3. Locate the **Service Provider** tile and tap it.
4. Select a service provider by tapping it in the Select Service Provider view. (If you want to create the provider under a category, expand the category first.)
5. If you've created a new provider, add the information and tap **Save**.
6. When you're finished completing the fields, tap **Save**.
7. The service and provider are now linked.

How to link a service to a service provider:

1. Locate or create the service provider from the **Service Providers** view by tapping the **Service Providers** tile in the People + Services topic and tapping the plus sign.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing service, tap **Service** and select the service you want to add by tapping it.
5. If you're adding a new service, tap **Service** and add a name and start date, and then tap **Full Details** to add more information.
6. Complete the information for the service and tap **Save**.

How to associate a task with a contact, service provider, or service:

You can create a task in the Tasks + Projects topic and associate it with a contact, service provider, or service (or) you can associate a task to a contact, service provider, or service directly from the People + Services topic. For detailed information about tasks, refer to the Tasks + Projects help.

1. Locate the contact, service provider, or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.

4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a checklist with a service provider or service:

You can create a checklist in the Notes + Files, Lists topic and associate it with a service provider or service (or) you can associate a checklist to a service provider or service directly from the People + Services topic. For detailed information about checklists, refer to the Notes + Files, Lists help.

1. Locate the service provider or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate an appointment with a contact, service provider, or service:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a contact, service provider, or service, follow the procedure below.

1. Locate the contact, service provider, or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.

5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with a contact, service provider, or service:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to a contact, service provider, or service, follow the procedure below.

1. Locate the contact, service provider, or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a bookmark with a contact, service provider, or service:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with a contact, service provider, or service (or) you can associate a bookmark to a contact, service provider, or service directly from the People + Services topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate the contact, service provider, or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate a file reference with a contact, service provider, or service:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with a contact, service provider, or service (or) you can associate a file reference to a contact, service provider, or service directly from the People + Services topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate the contact, service provider, or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate photos, audio, drawings, or video with a service or service provider:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with a service provider or service (or) you can associate a media item with a service or service provider directly from the People + Services topic. For detailed information about creating media items, refer to the Media help.

1. Locate the service provider or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media file, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the service or service provider.

How to associate a note with a a contact, service provider, or service:

You can create a note in the Notes + Files, Lists topic and associate it with a contact, service provider, or service (or) you can associate a note to a contact, service provider, or service directly from the People + Services topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate the contact, service provider, or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate an expense with a contact or service:

You can create an expense in the Finances topic and associate it with a contact or service (or) you can associate an expense to a contact or service directly from the People + Services topic. For detailed information about expenses, refer to the Finances help.

1. Locate the contact or service from the appropriate tile in the People + Services topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.

5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

Health + Goals

WHAT CAN I DO HERE?

The Health + Goals topic is ideal for managing your goals and visualizing the results for health, fitness, business, or well being. You may wish to manage your life or business goals, such as "Buy a House," "Finish a Triathlon," or "Exceed Last Quarter's Sales by 10%." Or, you might be a business person or small business owner (such as a personal trainer) who wants to manage metrics for their clients or employees. This is precisely what Health + Goals allows you to do -- set goals and see the progress in a graphical format for one or more persons. When you define your goals in your LightArrow app, you can record all the activities that need to be completed in order to reach those goals through tasks. In addition, you can add items such as notes or files as reference material; photos or videos of progress; expenses, such as for class instruction; and shopping items, such as equipment that's necessary.

You may also wish to maintain a solid understanding of your health; stay focused on your exercise and nutrition goals; as well as track general activities. Your app provides you with a single source for recording all your health, fitness, and life goals; health statistics such as weight, blood pressure, cholesterol, blood sugar, and body fat; your medications and prescriptions; and your health history such as procedures, treatments, and wellness.

Your app provides robust logging capabilities so you can track your goal metrics, your food and drink intake, your workout activities, your insurance providers, and regular health checkups. Useful charts with metrics let you see trends and view progress. Smart integration with other topics means that as you are entering information for a health procedure you can enter associated tasks, shopping items, and providers and that information will show up automatically in the Tasks + Projects and People + Services topics.

GLOSSARY OF TERMS

Goals: Goals are items you wish to reach, such as buying a new house, losing 10 pounds, getting in shape, or learning a new skill. You can log metrics for goals and view your progress in a graphical format.

Goal Log Items: These are the user-defined metrics that you assign to goals (such as sales goals, weight, height, etc.)

Log Form: These forms allow you to record entries for items in a log. For example, you can track your weight, exercise, blood pressure, or other statistics.

Multi-Topic Log Form: These forms allow you to record entries for items in more than one log. For example, you can track your weight and your exercise in the same log form. This allows the information that you log to be graphed together so that you can more easily see any correlation or trends that might exist.

Health Projects: Health-related work items that you wish to accomplish. Losing some weight, training for a triathlon, and having your hip replaced are all examples of health projects.

Healthcare Providers: Companies, organizations, or individuals from whom you receive health-related products or labor. Your dentist, doctor, and local hospital are all examples of healthcare providers.

Health Services: Health-related products or labor you receive from companies, organizations, or individuals. An annual physical from your doctor and your membership at the local gym are examples of health services.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Health + Goals, Tasks + Projects, and People + Services topics. For example, imagine you have a goal to get in shape. You can define the goal in Health + Goals, complete with all relevant information such as appointments, reminders, tasks to sign up for a gym membership and to buy healthy food, the shopping list of the food to buy, bookmarks to your favorite exercise web sites, and so on, and that information will automatically show up in Tasks + Projects. Or, you could identify an entry in your device's Contacts as your primary care physician either from Health Projects in Health + Goals or from Service Providers in People + Services. You can then access this information from either place.

CATEGORIES FOR HEALTH + GOALS

Categories are available for use with Health + Goals. You can create, modify, hide, or delete categories via Settings or directly from a tile for a Health Project, Service, or Service Provider. When a category is deleted, it is completely

removed from your app. When a category is hidden, it no longer appears in the Categories tile, but it remains defined, and is still available in the category list when you are defining a new Health Project, Service, or Service Provider. Note that categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden. For information about creating categories, refer to your help for Manage Categories.

ALERTS

Alerts display at the top of the Health + Goals view for anything related to health projects and health services/service providers that are due within the next five days or currently overdue. For example, if you've set a reminder to set up a yearly physical, an alert shows.

MANAGING GOALS (GOALS VIEW)

From the Health + Goals topic, there are several aspects of goals that you can manage. You can log your goal progress and show totals or averages for designated time periods and subsequently view the progress in a list or graph. Several values are provided, such as units (pounds, minutes, day, %, and more); target values; and default values. In addition, you can associate items such as tasks, reminders, appointments, etc. to goal metrics for reminders or other reference materials.

How to add new goals:

Goals are things you aspire to reach, such as buying a new house, losing 10 pounds, getting in shape, or learning a new skill. You can log metrics for goals and view your progress in a list or graphical format.

1. In Health + Goals topic, tap the tile with the plus sign.
2. Tap **Goal**.
3. Name your goal to describe it, such as "Get in Shape in Three Months" and add a target date. You can add any additional details to make the goal more specific by using the Comment field.
4. Type a **Target Date** that you want to reach the goal.
5. If you want to add more detail, tap **Create and Add More Data**.
6. Optionally, add Alerts, Goal Log Items (described below), and Context Tags.
7. Add any associated items you wish to include, and then tap **Save**.

How to add goal log items:

Goal log items are used to track the progress of metrics that are related to your goals. Before you configure goal log items you must set up a goal as described in the previous procedure. Once your goal log items are set up, you can log your progress by tapping the **Goal Metrics** tile in the Goal view.

1. Locate the goal's tile in the Health + Goals topic, and tap it.
2. Tap the goal you wish to manage and then tap **Open**.
3. Tap the **Goal Log Items** tile and tap **Configure**.
4. Optionally, enter a comment to identify the goal log item or to add information about it.
5. Tap **Tap to add Log Item** to display the **New Goal Log Item** view.
6. Name the goal log item, such as "Running" or "Calories."
7. Add a Response Type (numeric, date, yes/no, etc.).
8. Add a Unit such as miles, calories, on a scale 1-5 etc. You can alternatively define your own unit by tapping **New** after tapping the entry in the **Unit** field.
9. Add a Target Value (this is the goal you wish to reach, such as the weight you wish to be or your total number of sales). The target value shows as a dotted line in the associated graph.
10. Optionally, add a Default Value. This is the value that will be logged as default if you don't change the value.
11. From the **Show as Summary** field, select how you want to view the data in graphs, such as the most recent, weekly average, etc.
12. Optionally, add context tags by tapping the **Context Tags** tile.
13. Tap **Save**.

How to add multiple goal metrics to a goal:

You can add one or more goal metrics to a goal. For example, if your goal is to get in shape, you might want to log your weight, measurements, time to run 5 kilometers, etc. Follow the procedure below to add additional metrics to a goal.

1. Locate the goal's tile in the Health + Goals topic, and tap it.
2. Tap the goal you wish to manage and then tap **Open**.
3. Tap the **Goal Log Items** tile and tap **Configure**.
4. Tap the plus sign to add a goal metric to track.
5. Add the data as described in the previous procedure.

6. Tap **Save**.
7. Optionally reorder the goal metrics by tapping the reorder icon, and then dragging the goal metrics reorder icons up or down.
8. Tap **Save**.

How to modify goals and add photos to goals:

You might want to change a goal or add a photo to a goal that represents it, which will display in the goal's tile.

1. Locate the goal's tile in the Health + Goals topic, and tap it.
2. Tap the goal you wish to manage and then tap **Open**.
3. Tap **Add Photo** in the upper left corner, and then choose an option to take or select a photo.
4. Change any other data you wish to modify by tapping the tiles.
5. When the photo has been added and information modified, tap **Save** to save the goal.

How to log goal metrics:

It's up to you how often that you log your goal metrics. When you log your progress, follow the procedure below.

1. Locate the goal's tile in the Health + Goals topic, and tap it.
2. Tap the Goal tile for the goal metric you wish to log, tap **Open**.
3. Tap the tile for the goal log item, and then tap **Enter Log Items**.
4. Enter the data for the goal metric(s), and then tap **Save**.

How to view your logged goal metrics in a list and/or graph:

You can view data and enter data from the view described below.

1. Tap the **Goals** tile.
2. Tap the goal form, tap **View Log Items**.
3. Choose **All Entries**.
4. A list, plot, line, or bar chart displays. To change the view, tap **List**, **Plot**, **Line**, and **Bar** -- depending on the chart or list you want to display.
5. If you wish to view the Legend, tap **Show Legend**.
6. If you wish to log data, tap the plus sign.

7. Tap the back button when you are finished viewing the data.

How to modify logged data:

1. Tap the **Goals** tile.
2. Tap the goal form, tap **View Log Items**.
3. Choose **All Entries**. (If you wish to change the latest entry, choose **View Log Items** -> **Edit Latest entry**.)
4. Tap the entry you wish to modify and change the data.
5. Tap **Save**.

LOGGING ACTIVITIES, HEALTH, MEDICATION, AND WELLNESS

Your LightArrow app includes capabilities for logging several types of statistics and you can configure any type of statistic that you wish to track. The app comes pre-loaded with several statistics for logging common activities, such as nutrition, health, medication, and wellness. You're welcome to delete or modify any type of statistic that's pre-loaded in your app to make it work for your life or business. You can also add your own custom metrics.

Consider that Log Forms are the forms where you log any item(s) that you wish to track, such as running, calories, body fat, blood pressure, vitamins, and/or allergies. Activities, Nutrition, Health Stats, Medication, Wellness, and Prescriptions are items that you can track. Log forms contain log items. You can log items directly from the tiles associated with Activities, Nutrition, Health Stats, Medication, Wellness, and Prescriptions; however, if you wish to track metrics on a regular basis, we recommend that you add these metrics to a Log Form. Take note that you can add single items or multiple items to a log form.

How to add new log forms and add log items to them:

Your LightArrow app includes tiles in the Health + Goals topic for Activities, Nutrition, Health Stats, Medication, Wellness, and Prescriptions. You can modify the items included within them in any way that works for your life or business (OR) you can create new log forms.

1. In the Health + Goals topic, tap the **Activities**, **Nutrition**, **Health Stats**, **Medication**, **Wellness**, or **Prescriptions** tile.
2. Tap the plus sign and then select **"...Log Form**, name the new log form, and then tap **Tap to add Log Item.**
3. You can choose existing log items or add new log items by tapping the plus sign. Add/Modify the following fields:

- **Comment** - describes the metric.
- **Response Type** - the type of response, such as Numeric, Text, Date, etc.
- **Unit** - calories, pounds, on a scale 1-5 etc. You can also define your own unit by tapping **New** after tapping the entry in the Unit field.
- **Target Value** - the target you wish to reach, such as the number of calories for a meal. The target value shows as a dotted line in the associated graph.
- **Default Value** - the value that will be logged as default if you don't change the value.
- **Show as Summary** - how you want to view the data summary, such as the most recent, weekly average, etc.

4. Optionally, add context tags by tapping the **Context Tags** tile.
5. Tap **Save**.

How to create a log form to log multiple items, such as calories, weight, exercise, etc. to identify trends:

1. In the Health + Goals topic, tap the **Log Forms** tile.
2. Tap the plus sign.
3. Choose **Multi-Topic Log Form** if you want to add multiple statistics from different categories (e.g. medication, activity and wellness).
4. Type a name and add an optional comment.
5. Tap **Tap to add Log Item** to add new log item(s).
6. Choose the Log Topic by tapping your selection.
7. From the **Select Log Items** view, select the item(s) you wish to track and then tap **Save**. Optionally, you can add a new log item by tapping the plus sign.
8. Tap **Save** from the **New Log Form** view.

How to add the items you wish to track to an existing log form, such as the miles you run or the calories you eat:

1. In the Health + Goals topic, tap the **Log Forms** tile.
2. Choose an existing log form and tap **Configure**.
3. Tap the plus sign.

4. Choose the Log Topic by tapping your selection.
5. From the **Select Log Items** view, select the item(s) you wish to track and then tap **Save**. Optionally, you can add a new log item by tapping the plus sign.
6. Tap **Save** from the **New Log Form** view.

How to log your statistics to a log form, such as the miles you run or the calories you eat:

You can log your statistics directly from log forms or through the Quick Menu. Refer to Quick Menu help for more information about logging your statistics from the Quick Menu. It's up to you how often that you log your metrics. When you log your progress, follow the procedure below.

1. Tap the large plus sign in the Health + Goals view.
2. Choose **Log Activity**, **Log Nutrition**, **Log Health Stat**, **Log Medication**, or **Log Wellness**.
3. Choose the item you wish to log.
4. Enter the value(s) for the metric(s), and then tap **Save**.

How to view your logged metrics in a list and/or graph:

You can view data and enter data from the view described below.

1. Tap the **Log Forms** tile or choose the tile that contains the metrics you wish to view.
2. Tap the log form (or metric) for the metric you wish to view, tap **View**, and tap **All Entries**.
3. A list, plot, line, or bar chart displays. To change the view, tap **List**, **Plot**, **Line**, and **Bar** -- depending on the chart or list you want to display.
4. If you wish to view the Legend, tap **Show Legend**.
5. If you wish to log data, tap the plus sign.
6. Tap the back button when you are finished viewing the data.

PRESCRIPTIONS

You can keep track of the details of your prescriptions in your LightArrow app. In addition, when you add medications, you can keep track of when they're administered by logging them.

1. In the Health + Goals topic, tap the **Prescriptions** tile.

2. Tap the plus sign in the Prescriptions view.
3. Type the name of the prescription in the **Name** field.
4. In the **Comment** field, type any notation for the prescription.
5. In the **Response Type** field, choose the type of response you wish to use, such as Numeric, Text, Date, etc.
6. From the **Unit** field, choose a unit (pills is selected by default, but can be changed). To create a custom unit, tap **New**.
7. In the **Target Value** field, add your target value. For example, if you wish to take one pill a day, type "1".
8. In the **Default Value** field, add your default value. For example, if you normally take one pill a day, type "1".
9. From the **Show as Summary** field, select how you want to view the data in graphs, such as the most recent, weekly average, etc.
10. Optionally, add context tags by tapping the **Context Tags** tile.
11. Tap **Save**. Now that you've added the medication, you can enter prescription details for it.
12. In the **Prescriptions** view, tap the medication that you added and tap **View** when the row expands.
13. In the **Rx Number** field, add the prescription number for the medication.
14. In the **Description** field, type a description.
15. In the **Expiration** field, enter an expiration date for your refills.
16. In the **Count/Size** field, type the number of pills available in each refill.
17. In the **Remaining** field, type the number of refills that you have remaining.
18. In the **Pharmacist** field, select the name of your pharmacy (service providers w/the Pharmacist category).
19. In the **Doctor** field, select the name of your doctor (service providers w/ the Healthcare category).
20. Tap **Save**.

EXPORTING TO CSV

You can export your activity, nutrition, health stats, medication, goal log item and wellness logs to CSV files allowing you to further analyze and print from your favorite spreadsheet or charting program.

To export to CSV:

1. Locate the appropriate log item by tapping the Goals, Activities, Nutrition, Health Status, Medication or Wellness tiles.
2. Tap the log item that you wish to export data from and then tap **Configure**.
3. Tap **Export**.
4. This process generates an email message with an attached CSV file.
5. Send this email message to yourself or a different recipient.
6. The file can be opened or saved via the email message.

HEALTH PROJECTS

Health Projects are health-related work items that you wish to accomplish. Dental health, training for a triathlon, and having your hip replaced are all examples of health projects. Health Projects is a touchpoint to the Health + Goals category in the Tasks + Projects topic. This means that projects defined here will appear as projects in the Health + Goals category in the Health + Goals topic. Under the Health + Goals category, subcategories for Health Projects exist and they are sorted alphabetically.

Refer to Projects to learn more about creating Health Projects.

HEALTHCARE PROVIDERS

Healthcare Providers are companies, organizations, or individuals from whom you receive health-related products or labor. Your dentist, doctor, and local hospital are all examples of healthcare providers. Healthcare Providers is a touchpoint to the Healthcare subcategory of the Services category in the People + Services topic. This means that service providers defined here will appear as service providers in the Healthcare subcategory of the Services category in the People + Services topic. Subcategories for Healthcare Providers are available, and are sorted alphabetically.

Refer to Service Providers to learn more about creating Healthcare Providers.

HEALTH SERVICES

Health Services are health-related products or labor you receive from companies, organizations, or individuals. An annual physical from your doctor and your membership at the local gym are examples of health services. Health Services is a touchpoint to the Health + Goals subcategory of the Services category in the People + Services topic. This means that services defined here will appear as services in the Health + Goals subcategory of the Services

category in the People + Services topic. Subcategories for Health + Goals are available, and sorted alphabetically.

Refer to Services to learn more about creating Services.

ASSOCIATING ITEMS WITH GOALS, HEALTH PROJECTS, HEALTHCARE PROVIDERS, AND HEALTH SERVICES

Your LightArrow app helps you to be more productive by allowing you to associate tasks, notes, files, checklists, media (photos, audio, video, and drawings), expenses, shopping items, appointments, reminders, and bookmarks with goals and other items. For example, if you set up a goal and you wish to keep notes about how the goals is progressing, you can create the notes in your LightArrow app, and associate them with the goal.

In the Health + Goals topic, you can associate tasks, checklists, appointments, reminders, bookmarks, files, media (audio, photos, videos, drawings), notes, expenses, services, and shopping items to Health Projects. You can associate tasks, checklists, appointments, reminders, bookmarks, files, media (audio, photos, videos, drawings), notes, and services to Service Providers. And you can associate tasks, checklists, appointments, reminders, bookmarks, files, media (audio, photos, videos, drawings), notes, and expenses to Health Services.

How to associate a task with an item in the Health + Goals topic:

You can create a task in the Tasks + Projects topic and associate it with an item in the Health + Goals topic (or) you can associate a task to an item directly from the Health + Goals topic. For detailed information about tasks, refer to the Tasks + Projects help.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open/configure it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a checklist with an item in the Health + Goals topic:

You can create a checklist in the Notes + Files, Lists topic and associate it with an item in the Health + Goals topic (or) you can associate a checklist to an item directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes + Files, Lists help.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate an appointment with an item in the Health + Goals topic:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to an item in Health + Goals, follow the procedure below.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.

8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with an item in the Health + Goals topic:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to an item in Health + Goals, follow the procedure below.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a bookmark with an item in the Health + Goals topic:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Health + Goals topic (or) you can associate a bookmark to a Health + Goals topic directly from the Health + Goals topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate a file reference with an item in the Health + Goals topic:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with an item in the Health + Goals topic (or) you can associate a file reference to an item in the Health + Goals topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate photos, audio, drawings, or video with an item in the Health + Goals topic:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in Health + Goals (or) you can associate a media item with an item in the Health + Goals topic directly from the Health + Goals topic. For detailed information about creating media items, refer to the Media help.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the goal, log item, health project, healthcare provider, or health service.

How to associate a note with an item in the Health + Goals topic:

You can create a note in the Notes + Files, Lists topic and associate it with an item in the Health + Goals topic (or) you can associate a note to an item in the Health + Goals topic directly from the Health + Goals topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate the item (goal, health project, healthcare provider, or health service) from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate an expense with a Health Project or Health Service in the Health + Goals topic:

You can create an expense in the Finances topic and associate it with a health project or service (or) you can associate an expense to a health project or service directly from the People + Services or Health + Goals topics. For detailed information about expenses, refer to the Finances help.

1. Locate the health project or service from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.
5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

How to associate a shopping item with a Goal or Health Project in the Health + Goals topic:

You can create a shopping item in the Shopping + Gifts topic and later associate it with a health project or service in the Health + Goals topic (or) you can add a shopping item directly in the Health + Goals topic. For detailed information about shopping items, refer to the Shopping + Gifts help.

1. Locate the goal or health project from the appropriate tile in the Health + Goals topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing shopping item, tap **Shopping Item** and select the shopping item you want to add by tapping it.
5. If you're adding a new shopping item, tap **Shopping Item** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

ASSOCIATING HEALTH SERVICES WITH HEALTH SERVICE PROVIDERS

When a health service provider performs a service for you, such as a doctor performing a physical, it's a good idea to link the service provider to the service in the Health + Goals topic. You can add the service to the service provider or add the service provider to the service. The following procedures explain how:

How to associate a health service provider with health service:

1. Locate or create the service from the **Health Services** view by tapping the **Health Services** tile in the Health + Goals topic and tapping the plus sign.
2. Locate the **Health Service**, tap it, and then tap **Open**.
3. Tap the **Service Provider** tile.
4. Add or choose a health service provider by tapping the plus sign or selecting a provider. (If you want to create the provider under a category, expand the category first.)
5. If you've created a new health service provider, add the information and tap **Save**.
6. When you're finished completing the fields, tap **Save**.

How to associate a health service with a Health Service Provider in the Health + Goals topic:

1. Locate or create the health service provider from the **Healthcare Providers** view by tapping the **Healthcare Providers** tile in the Health + Goals topic.
2. Tap the Healthcare Provider and then tap **Open**.
3. Tap the plus sign.
4. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
5. If you're choosing an existing health service, tap **Service** and select the health service you want to add by tapping it.
6. If you're adding a new service, tap **Service** and add a name and start date, and then tap **Full Details** to add more information.
7. Complete the information for the health service and tap **Save**.

Finances

WHAT CAN I DO HERE?

The Finances topic enables you to quickly and easily manage financial information, such as accounts, bill payments, expenses, charitable donations, investments, assets, and financial documents. In this view you can set up your bank accounts with balances, and manage expenses and payments which debit and credit those bank accounts (**Note**: they are not linked to your actual bank accounts online). You can also set up repeat schedules for recurring payments. In this view, you can manage your charitable donations, which includes recipients, amounts, and due dates. In addition, for Financial Assets, you can add other items; for example, if you own stock, you might link a bookmark to NASDAQ to stay on top of it. Automatic reminders are available through integration with your device's calendar to ensure you never miss a payment, expense, donation, or other financial item that's due.

GLOSSARY OF TERMS

All Accounts: All the bank and cash accounts that are defined.

Banks: The banks that you use. Touchpoint to the Bank subcategory of the Finance + Legal category in the People + Services topic.

Service Payment Templates: Forms for payments to services.

Other Payment Templates: Forms for payments to individuals and other non-services.

Payment: A payment is either for a service (lawn care, for example) or to a person (other payment). Payments are independent of topic items, such as projects, trips, events, etc.

Expense: An expense is something you can add to "topic items" (projects, trips, events, etc.). It is not necessary to associate an expense with a topic item.

Charitable Donations: Donations to charities.

Financial Assets: Assets that you own such as stocks, bonds, IRA's etc. Touchpoint to the Financial category in the Home + Assets topic.

Financial Notes: Notes for anything related to your personal or business finances. Touchpoint to the Financial category in the Notes + Files, Lists topic.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Finances and other topics. The Finances topic includes touchpoints to the People + Services, Notes + Files, Lists, and Home + Assets topics. For example, within the Finances topic, you could identify bill payments for services that you have defined in People + Services. Or, if you have investments defined in Home + Assets, investment details are available directly within Finances to give you a complete view of your financial health. Or, if you have financial information defined in Notes + Files, such as copies of insurance policies or bookmarks to investing web sites, that information is available directly within Finances.

CATEGORIES FOR FINANCES

Categories are available for use with Finances. You can create, modify, hide, or delete categories via Settings or directly from a tile for an expense, payment, donation, or asset, or note. When a category is deleted, it is completely removed from your app. When a category is hidden, it no longer appears in the Categories tile, but it remains defined, and is still available in the category list when you are defining a new expense, payment, donation, or asset, or note. Note that categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden. For information about creating categories, refer to your help for Manage Categories.

ALERTS

Any expense-related item that's open and due in the future for five days appears in the Alerts section of the Finances view.

EXPENSES (NEW EXPENSE / EXPENSES VIEW)

Expenses are any expenditures that are necessary in your life. For example, you might set up an education expense for tuition that's due for a class on a

designated date. In fact, you can associate the expense directly with that class so you're able to keep better track of your education expenses.

In your LightArrow app, you can associate several types of items to expenses in order to efficiently plan, and to organize in a way that you can easily find the information that you need. For example, you can associate audio, photos, videos, and drawings to expenses.

How to group expenses:

There is one selector at the top-left of the Expenses view. It allows you to group by all expenses or to group by starting date, last updated, or context tag.

1. In the Finances view, tap the selector at the top-left of the view.
2. From the selector, choose **Show All**, **Starts**, **Last Updated**, or **Context Tags**. The app remembers the previous selection.

CREATING EXPENSES

How to create a new expense:

1. In the Finances view, tap the plus sign and choose **Expense**.
2. In the New Expense view, type a name and comment.
3. Enter an amount for the expense by entering it into the **Amount** field.
4. Select the source (account) that the expense will be debited from in the **Source** field. The app makes the adjustment to the balance of the designated account.
5. Select a date and/or time that the expense is due from the **Time** field.
6. If someone, besides you, is paying for the expense, select the person from your contacts by tapping the **Paid By** tile. Select a contact, and then tap **Save**.
7. If you wish to categorize the expense, choose a category by tapping the **Categories** tile. Tap the category and then tap **Save**.
8. To add context tags, tap the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.) Tap **Set** to set the context tag.
9. To add additional data, such as Participants, Associated Topic and an Associated Contact, tap **Create and Add More Data**.
10. If others are participating in the expense, tap the **Participants** tile, and then select contacts from the Participants view by tapping the add selector. Choose the participants and then tap **Save** and return to the new Expense view. (**Note**: you can email all of them from this view).

11. To include an associated topic for the expense, such as a travel expense, choose the topic item from the **Associated Topic** tile. Go back to the New Expense View when you are finished.
12. To associate one contact with this expense, choose the contact by tapping the **Contacts** tile, selecting a contact, and tapping **Save**.
13. Tap **Save**.

MODIFYING EXPENSES

How to modify an expense:

1. Tap the **Expenses** tile in the Finances topic.
2. Tap the expense you wish to modify and then tap **Open**.
3. Modify the items as directed.
4. Tap **Save**.

DELETING EXPENSES

How to delete a expense:

1. Tap the **Expenses** tile in the Finances topic.
2. Tap the expense you wish to delete to expand the row, and then tap **Delete**.

CREATING PAYMENTS (BILLS) AND SERVICE PAYMENT TEMPLATES

Payments with Service Payment Templates are suitable for recurring payments for services such as lawn care, housekeeping, contractors, or other service providers.

Refer to Service Payment Templates for information about creating bills/ payments.

CREATING ACCOUNTS

You can create accounts in your LightArrow app and take note of the balance. You can record your transactions in your LightArrow app to keep track of expenditures. They are not associated with your actual online accounts. They're another way to balance your expenses without using an online service.

How to add accounts:

1. In the Finances topic, tap the **All Accounts** tile.
2. Tap the plus sign.
3. Type a name for the account in the Name field.

4. In the **Amount** field, type the initial balance of the account.
5. Enter the date of the initial balance in the **As of Date Field**.
6. In the **Bank** field, choose the Bank account the account is associated with (or choose cash if cash is to be recorded).
7. If you chose a bank account, continue by completing the fields below. Otherwise, tap **Save**.
8. Type your Account number in the **Acct. Number** field.
9. From the **Category** field choose the type of account, such as Debit Card, Credit Card, Etc. (or create a new type by tapping **New**).
10. Choose whether the account is Active or not.
11. If the account has an expiration date, choose by tapping the **Expires** field.
12. If you wish to record a security code, you can type it in the **Security Code** field. When you wish to view this code at a later time, tap the lock icon at the bottom of the view and enter your PIN, which you set up in Secure Your Data.
13. If the account has a PIN, you can type it in the **PIN** field. When you wish to view this code at a later time, tap the lock icon at the bottom of the view and enter your PIN, which you set up in Secure Your Data.
14. **Note**: After you save the account, if you wish to view all your transactions for this account, you can tap **Transactions**.
15. Tap **Save**.

MODIFYING ACCOUNTS

How to modify an account:

1. Tap the **All Accounts** tile in the Finances topic.
2. Tap the account you wish to modify and then tap **Open**.
3. Modify the items as directed.
4. Tap **Save**.

DELETING ACCOUNTS

How to delete an account:

1. Tap the **Accounts** tile in the Finances topic.

2. Tap the account you wish to delete to expand the row, and then tap **Delete**.

WORKING WITH TRANSACTIONS (TRANSACTIONS VIEW)

MODIFYING AND VIEWING ALL TRANSACTIONS

The Transactions view provides you with a list of all expenses, deposits, transfers and bill payments for a chosen account. It also shows you your Initial/Adjusted Balance, as well as your current balance of your account. In addition, you can perform the following actions:

- Deposits
- Payments or Withdrawals
- Deposits from Persons
- Payments to Persons
- Deposits from Service Providers
- Payments to Service Providers
- Transfers from across accounts
- Transfer to other accounts

How to view and modify transactions (access the Transactions view):

1. In the **Finances** topic, tap the **All Accounts** tile.
2. Tap an account listed in the All Accounts view.
3. When the cell expands, tap **Transactions**.

How to record a new deposit:

1. In the Transactions view, tap the plus sign and tap **Deposit**.
2. In the New Transaction view, from the **From** field, type where or who the deposit came from.
3. From the **Date** field, select a date.
4. Enter the amount in the Amount field.
5. Optionally, enter a reference number in the **Number** field.
6. Tap **Save**.

How to record a new payment or withdrawal:

1. In the Transactions view, tap the plus sign and tap **Payment or Withdrawal**.

2. In the New Transaction view, from the **To** field, type where or who the payment or withdrawal is for.
3. From the **Date** field, select a date.
4. Enter the amount in the Amount field.
5. Optionally, enter a reference number in the **Number** field.
6. Tap **Save**.

How to record a new deposit from a person:

1. In the Transactions view, tap the plus sign and tap **Deposit from Person**.
2. In the New Transaction view, tap the **Person** field, and select a contact from your contacts.
3. From the **Date** field, select a date.
4. Enter the amount in the Amount field.
5. Optionally, enter a memo in the **Memo** field.
6. Optionally, enter a reference number in the **Number** field.
7. Tap **Save**.

How to record a new payment to a person:

1. In the Transactions view, tap the plus sign and tap **Payment to Person**.
2. In the New Transaction view, tap the **Person** field, and select a contact from your contacts.
3. From the **Date** field, select a date.
4. Enter the amount in the Amount field.
5. Optionally, enter a memo in the **Memo** field.
6. Optionally, enter a reference number in the **Number** field.
7. Tap **Save**.

How to record a new deposit from a Service Provider:

1. In the Transactions view, tap the plus sign and tap **Deposit from Service Provider**.
2. In the New Transaction view, from the **Provider** field, choose the service provider when the Select Service Provider view appears. Tap **Save**.
3. From the **Date** field, select a date.
4. Enter the amount in the **Amount** field.

5. Optionally, enter a memo in the **Memo** field.
6. Optionally, enter a reference number in the **Number** field.
7. Tap **Save**.

How to record a new payment to a Service Provider:

1. In the Transactions view, tap the plus sign and tap **Payment from Service Provider**.
2. In the New Transaction view, from the **Provider** field, choose the service provider when the Select Service Provider view appears. Tap **Save**.
3. From the **Date** field, select a date.
4. Enter the amount in the **Amount** field.
5. Optionally, enter a memo in the **Memo** field.
6. Optionally, enter a reference number in the **Number** field.
7. Tap **Save**.

How to transfer from other accounts:

1. In the Transactions view, tap the plus sign and tap **Transfer from Other Account**.
2. In the New Transaction view, from the **Account** field, choose the account.
3. From the **Date** field, select a date.
4. Enter the amount in the **Amount** field.
5. Optionally, enter a memo in the **Memo** field.
6. Optionally, enter a reference number in the **Number** field.
7. Tap **Save**.

How to transfer to other accounts:

1. In the Transactions view, tap the plus sign and tap **Transfer to Other Account**.
2. In the New Transaction view, from the **Account** field, choose the account.
3. From the **Date** field, select a date.
4. Enter the amount in the **Amount** field.
5. Optionally, enter a memo in the **Memo** field.
6. Optionally, enter a reference number in the **Number** field.

7. Tap **Save**.

BANKS (SERVICE PROVIDERS)

In your LightArrow app, Banks are service providers, which are given the category of Bank, by default. When you set up Accounts, as described above, you can assign a Bank to it.

To learn more about creating Banks, refer to Service Providers.

CHARITABLE DONATIONS

In your LightArrow app, you can keep track of the charitable donations that you make. You can set up cash donations or donations for goods.

How to record charitable donations:

1. In the Finances topic, tap the **Charitable Donations** tile and tap the plus sign.
2. Tap the **Recipient** field, and choose a contact from the **Contacts** view for the donation. Tap **Save**.
3. Add an optional comment.
4. If you wish, type the estimated spend for the donation in the **Estimated Spend** field.
5. If you wish, select a due date for the donation from the **Due Date** field.
6. You can assign context tags to donations. To add context tags, tap the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
7. If you're planning to donate goods, tap **Create and Add More Data** to add shopping items or other associated data, such as tasks or files.
8. Tap **Save**.

MODIFYING DONATIONS

How to modify a donation:

1. Tap the **Charitable Donations** tile.
2. Tap the donation you wish to modify and then tap **Open**.
3. **Note**: if you wish to add shopping items to the donation, tap **Shopping Items**.
4. Modify the items as directed.
5. Tap **Save**.

DELETING DONATIONS

How to delete a donation:

1. Tap the **Charitable Donations** tile in the Finances topic..
2. Tap the donation you wish to delete.
3. When the row expands, tap **Delete**.

FINANCIAL ASSETS

In your LightArrow app, an **asset** is a resource with monetary value that an individual or business owns or controls, or leases. With assets, you can manage the manufacturer, model, SKU, serial number, or VIN#. In addition, you can manage the seller, purchase information (date, cost and current value), location and **context tags**.

To learn more about creating Assets, refer to Assets.

FINANCIAL NOTES

In your LightArrow app, you can create notes for supporting information about your finances. These notes take the category of Financial, by default.

To learn more about creating Notes, refer to Notes.

ASSOCIATING ITEMS WITH EXPENSES AND CHARITABLE DONATIONS

The Finances topic helps you to be more productive by allowing you to associate media items to Expenses, and to associate tasks, appointments, reminders, checklists, and media items to Charitable Donations. For example, if you're making charitable donations to an organization, you can scan the receipt, store it by using an online cloud service, and associate it with donation in your LightArrow app. By associating these receipts with the donation, you have a central location to find these receipts when you're filing your taxes.

How to associate a task with a donation:

You can associate a donation with a task or a task with a donation.

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select a donation that you want to associate it with.

1. Locate a donation by tapping the **Charitable Donations** tile in the Finances topic.
2. After you open the donation, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a checklist with a donation:

You can create a checklist in the Notes + Files, Lists topic and associate it with a donation in the Finances topic (or) you can associate a checklist with a donation directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes + Files, Lists help.

1. Locate a donation by tapping the **Charitable Donations** tile in the Finances topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate an appointment with a donation:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a donation, follow the procedure below.

1. Locate a donation by tapping the **Charitable Donations** tile in the Finances topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.

4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with a donation:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to a donation, follow the procedure below.

1. Locate a donation by tapping the **Charitable Donations** tile in the Finances topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a bookmark with a donation:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Finances topic (or) you can associate a bookmark to a Finances topic directly from the Finances topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate a donation by tapping the **Charitable Donations** tile in the Finances topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate a file reference with a donation:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with a donation (or) you can associate a file reference to a donation directly in the Finances topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes + Files, Lists help.

1. Locate a donation by tapping the **Charitable Donations** tile in the Finances topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate photos, audio, drawings, or video with a an expense or donation:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in the Finances topic (or) you can associate a media item with an expense or donation directly from the Finances topic. For detailed information about creating media items, refer to the Media help.

1. Locate an expense or charitable donation by tapping the **Expenses** tile or the **Charitable Donations** tile in the Finances topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the expense or donation.

Home + Assets

WHAT CAN I DO HERE?

The Home + Assets topic enables you to manage information about your home or business and the assets that you own. The goal of the Home + Assets topic is to help you keep track of the things that you own or rent and the details about these items. This is important for insurance reasons in case of a loss or when maintaining the items for your home or business. For example, it's a good idea to keep track of the details about your automobile, such as the purchase date, cost, current value, VIN #, manufacturer, photos, scanned insurance cards, and other details. If your automobile is ever stolen or lost, you'll have all its information stored in one place. In addition, you can remind yourself when to service your vehicle, and you can also record any expenses and receipts related to the service. This applies to all the home and business assets that you track.

GLOSSARY OF TERMS

Asset: All the items that you rent or own, such as vehicles, homes, boats, furniture, etc.

Home + Asset Services: The services (such as landscape maintenance, oil changes, repairs, etc.) that occur for your assets. Touchpoint to the Home + Assets category of services in People + Services.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Home + Assets and People + Services. For example, you may have a landscaping service or a mechanic who performs regularly scheduled auto maintenance. You can define these service providers directly from within Home + Assets as you are defining the home and car and they will show up automatically in People + Services. Or, if you have already defined those service providers in People +

Services, you can link to them directly as you are defining your home and car in the Home + Assets topic.

CATEGORIES

Categories are available for use with assets. You can create, modify, hide, or delete categories via Settings for the asset. When an asset category is deleted, it is completely removed from your app. When an asset category is hidden, it no longer appears as a category for assets, but it remains defined in the app and is still available in the category list when you are defining a new asset. Note that asset categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden.

ALERTS

Any expense or service-related item that's open and due in the future for five days appears in the Alerts section of the Home + Assets view.

ASSETS

For information about creating and modifying Assets, refer to Assets.

HOME + ASSETS SERVICES

For information about creating and modifying Services, refer to Services.

Education

WHAT CAN I DO HERE?

The Education topic is perfect for managing all learning topics, assignments, education-related information resources, and class notes. If you're a student or anyone who's learning something new through any type of class (from Algebra to Zoology), the Education topic keeps your learning on track. For example, you can set up all your subjects and add assignments to your subjects. Alerts and automatic reminders keep you on top of your studying, practice, and homework assignments through integration with your device's calendar. In addition, you can add various items to the Education topic, such as tasks, bookmarks, photos, tasks, and more. This allows you to keep track of bookmarks for online references, such as syllabuses, schedules, invoices, and class assignments, as well as other reference materials and to-dos. In addition, you can easily manage your class notes through the touchpoint with the Notes + Files, Lists topic and associate your notes with any class subject or education project.

GLOSSARY OF TERMS

Subject: Any type of class that you take to learn something new (Algebra, Karate, Piano, English, etc.).

Education Project: A project for any education-related endeavor, such as "Home Schooling 2014," "Learn Piano," "Java Programming," etc. for the purpose of assigning tasks and holding reference material. Education projects take the category of "Education."

Education Subject: A subject, such as "English 101" or "Algebra 1."

Assignment: A project for any education-related assignment that requires completion. Education Assignments take the category of "Assignment."

Education Notes: Class notes or any notes related to learning something new.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Education and other topics. Touchpoints for Education include Projects + Tasks and Notes + Files, Lists. For example, if you have notes you want to use for subjects you're taking, you can specify the notes directly from within the Notes + Files, Lists topic and those notes will automatically be available from within the Education topic. The same is true for projects that you define in Tasks + Projects -- projects that you created for your education.

CATEGORIES FOR EDUCATION

Categories are available for use with education projects, subjects, and notes. You can create, modify, hide, or delete categories via Settings or directly from a tile for a subject, project or note. When a category is deleted, it is completely removed from your app. When a education or notes category is hidden, it no longer appears in the **Categories** tile, but it remains defined, and is still available in the category list when you are defining a new project, subject, or note. Note that categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden. For information about creating categories, refer to your help for Manage Categories.

ALERTS

Alerts display at the top of the Education view for anything related to education projects, subjects, or assignments that are due within the next five days or currently overdue. For example, if you have an assignment that's due, an alert displays to let you know. Or, if you've created a reminder to study for an exam, an alert shows.

CREATING EDUCATION PROJECTS (NEW PROJECT / PROJECT VIEW)

An Education Project is a project for any education-related endeavor, such as "Home Schooling 2014," "Learn Piano," "Java Programming," etc. for the purpose of assigning tasks and holding reference material. In your LightArrow app, you can associate several types of items to projects in order to efficiently plan them, and to organize them in a way that you can easily find the information that you need. For example, you can associate tasks, checklists, appointments, expenses, shopping items, files, and other items.

Refer to Projects to learn more about creating Education Projects.

HOW TO CREATE SUBJECTS (SUBJECTS VIEW)

A subject is any type of class that you take to learn something new (Algebra, Karate, Piano, English, etc.). You can view all your subjects in the Subjects view by tapping the Subjects tile in the Education topic. When you're viewing a list of subjects in the Subjects view, you can view the list in different ways. You can show all subjects; view subjects by category; view subjects by context tag; or view subjects by the last updated date. Additionally, you can create an subject that already reflects the category or context tag that you've expanded in this view by tapping a category and then tapping **Tap to add a New Subject** below it.

How to group Subjects:

1. Tap the **Subjects** tile in the Education Topic.
2. In the Subjects view, tap the selector at the top-left of the view.
3. Select Ungrouped, Category, Context Tag or Last Updated. The app remembers the previous selection.

How to create Subjects:

1. In the Education topic, tap the **Subjects** tile.
2. From the **Subjects** view, tap **Tap to add a New Subject**.
3. To quickly create a subject, type a name and then tap **Save**.
4. Optionally, tap **Full Details** (after typing a name for the subject) and add a comment describing the subject.
5. If you wish to add a thumbnail that represents the subject, tap **Add Photo** and select or add a photo.
6. Tap the **Assignments** tile to add an assignment (the assignment is essentially a project with the Assignment category), then tap **Save**.
7. Tap the **Categories** tile to add a category.

8. Add context tags to the subject by tapping the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
9. Tap **Save**.

How to modify subjects:

1. In the Education topic, tap the **Subjects** tile.
2. From the **Subjects** view, tap a subject and then tap **Open**.
3. If you wish to modify the thumbnail that represents the subject, tap the photo and select or add a new one.
4. Tap the **Assignments** tile to add or delete an assignment, then tap **Save**.
5. Tap the **Categories** tile to modify the category.
6. Add or modify context tags for the subject by tapping the **Context Tags** tile (select an existing tag or create a new one by tapping **New**.)
7. Tap **Save**.

EDUCATION NOTES

Refer to Notes to learn more about creating Education Notes.

ASSOCIATING ITEMS WITH SUBJECTS, EDUCATION NOTES, AND EDUCATION PROJECTS

The Education topic helps you to be more productive by allowing you to associate tasks, appointments, reminders, notes, checklists, files, bookmarks, expenses, services, audio, photos, videos, and drawings to education subjects. For example, if you've added a subject that represents an English class, you might set up appointments with your teacher and you'll want to be able to easily see all appointments associated with the class in one place. By associating appointments with the subject, you have a central location to view these appointments.

Refer to Projects to learn more about associating items with Education Projects.

Refer to Notes to learn more about associating items with Education Notes.

How to associate a task with a subject:

You can associate a subject with a task or a task with a subject.

Note: Anywhere you find a task in the app, you can open it, tap its **Associated Topic** tile, and select a subject that you want to associate it with.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate an appointment with a subject:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a Subject, follow the procedure below.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a note with a subject:

You can create a note in the Notes + Files, Lists topic and associate it with a subject (or) you can associate a note to a subject directly from the Education topic. For detailed information about notes, refer to the Notes + Files, Lists help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing note, tap **Note** and select the note you want to add by tapping it.
5. If you're adding a new note, tap **Note** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the note and tap **Save**.

How to associate a reminder with a subject:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to a subject, follow the procedure below.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a checklist with a subject:

You can create a checklist in the Notes + Files, Lists topic and associate it with a subject in the Education topic (or) you can associate a checklist to a task directly from the Notes + Files, List topic. For detailed information about checklists, refer to the Notes +Files, Lists help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.

5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate a file reference with a subject:

You can create a file reference in the Notes + Files, Lists topic to your local and online files and associate it with a subject (or) you can associate a file reference to a subject directly in the Education topic. Files can be local or stored online. For detailed information about creating file references, refer to the Notes +Files, Lists help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

How to associate a bookmark with a subject:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Education topic (or) you can associate a bookmark to a Education topic directly from the Education topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate an expense with a subject:

You can create an expense in the Finances topic and associate it with a subject (or) you can associate an expense to a subject directly from the Education topic. For detailed information about expenses, refer to the Finances help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing expense, tap **Expense** and select the expense you want to add by tapping it.
5. If you're adding a new expense, tap **Expense** and add a name, amount, and due date/time.
6. Add other optional information.
7. Tap **Save**.

How to associate a service with a subject:

You can create a service in the People + Services topic and later associate it with a subject in the Education topic (or) you can add a service directly in the Education topic. For detailed information about services, refer to the People + Services help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing service item, tap **Service** and select the service you want to add by tapping it.
5. If you're adding a new service, tap **Service** and add the necessary information for the service.
6. Add other optional information.
7. Tap **Save**.

How to associate photos, audio, drawings, or video with a subject:

You can create photos, audio, or video within the Media topic (or in some cases directly with your device) and associate them with an item in Education (or) you

can associate a media item with a subject directly from the Education topic. For detailed information about creating media items, refer to the Media help.

1. Locate a subject by tapping the **Subjects** tile in the Education topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and select the file you want to add.
5. If you're adding a new media item, tap **Audio**, **Photo**, **Video**, or **Drawing** and complete the necessary actions.
6. Save the subject.

Notes + Files, Lists

WHAT CAN I DO HERE?

The Notes + Files, Lists topic is perfect for managing local and online notes, checklists and to-dos, and online and local files -- all in one place. You can create and organize notes, checklists and to-dos, drawings, video and audio. With this view, you can neatly organize your notes into notebook or categories. Once you've created your notes, to-do lists or other masterpieces, you can easily share them with your friends, family, or coworkers through email or social media. With just a few taps, they can open the notes directly in their LightArrow app.

With this view you can record and add audio and video, add photos, and hand-write and draw with your finger or stylus. Drawing tools include 35 beautiful colors with alpha options; line width choices; eraser; clear; undo; and email capabilities for drawings. Printing is also available for notes and drawings.

If you use online note services such as Evernote® or Toodledo® you can sync those notes seamlessly with your LightArrow app. Eliminate app hopping with the access to online files from Dropbox™, Box™, Google Drive™ and SkyDrive™.

If you're using the My.Notes or Pro.Notes apps, you'll find that you will receive most, but not all of features described here (such as "Touchpoints"). If you want to purchase the full app, you can find it at: LifeTopix at the Apple App Store

GETTING STARTED

If you haven't done so already, when you begin using the Pro.Notes or My.Notes apps or the Notes + Files, Lists topic, start by setting up the following:

- **Categories**: (**Settings** -> **Manage Categories**) Set up categories for bookmarks and notes.
- **Backup, Restore, & Sync**: (**Settings** -> **Backup, Restore & Sync**) If using Sync + Share, set up device-to-device sync.
- **Notes + Files, Lists**: (**Online Notes** tile): Optionally set up Evernote® and Toodledo® logins.
- **Notes + Files, Lists**: (**Folders** or **Files** tile): Optionally set up logins for cloud services for file access.
- **Settings**: (**Settings** -> **Logins for Integrations**) This view gives you access to **all** integration's logins.
- **Notebooks**: (**Notes** tile -> **Group by Notebook** -> **Manage Notebooks**.)

GLOSSARY OF TERMS

Folders: The local folder on your device, plus all online folders you have defined.

Files: Digital files on your device or shortcuts to files in your online folders.

Checklists: general-purpose lists that you create in your LightArrow app.

Online Notes: Evernote® and Toodledo® notebooks and notes.

Notes: Digital notes you have made in your LightArrow app.

Categories: All notes defined in your LightArrow app, sorted by category.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Finances, Shopping + Gifts (Coupons), Travel + Places, and Education. Once you define travel-related resources such as bookmarks and online documents in Travel + Places, those resources are also accessible from Notes + Files, Lists. Or, if you have an education-related resource such as a research paper associated with an assignment in the Education topic, you can access the paper directly from the Notes + Files, Lists topic.

CATEGORIES FOR NOTES + FILES, LISTS

Categories are available for use with notes. You can create, modify, hide, or delete categories via Settings or directly from a tile for a note. When a category is deleted, it is completely removed from your app. When a notes category is

hidden, it no longer appears in the **Categories** tile, but it remains defined, and is still available in the category list when you are defining a new note. Note that categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden. For information about creating categories, refer to your help for Manage Categories.

ALERTS

Alerts display at the top of the Notes + Files, List view for anything related to checklists that are due within the next five days or currently overdue. For example, if you have a to-do list with items that are due, an alert displays to let you know. Or, if you've created a reminder for a note, it will display as an alert.

NOTES VIEW

Notes can include audio, video, photos, drawings, handwriting, and text. You can create notes in many areas of your LightArrow app, but you primarily manage notes via the Notes + Files, Lists topic. You can view all notes by tapping the Notes tile (including those synced with Evernote and Toodledo). Notes in this view are sorted in ascending order of date; notes with no date are listed at the bottom. If you wish to search for a note, tap the magnifying glass at the top-right of the view. To change the view of notes, you can choose how they are sorted. Options include: **Show All**, **Category**, **Notebook**, **Context Tag**, **Date Tag**, and **Last Updated**.

ALL ONLINE NOTES VIEW (EVERNOTE AND TOODLEDO NOTES)

Your LightArrow app includes simple, but advanced note-taking and provides access to best-in-class note-taking services such as Evernote and Toodledo. For example, you can open notes directly in Evernote, but keep them in context with everything else you're doing in your life in your LightArrow app. For example, you might associate your Evernote notes with a project that you've created in your LightArrow app. In your LightArrow app, the All Online Notes view allows you to access, view, and sync notes from Evernote and Toodledo.

How to sign into Evernote or Toodledo:

1. In the Notes + Files, Lists view, tap Online Notes.
2. In the section for the service you wish to set up, tap **Sign In**.
3. Enter your credentials as requested by the external application.

How to work with Evernote notes:

You can view your Evernote notes directly from your LightArrow app (or) you can sync your Evernote notes, which creates a LightArrow note and launches the

Evernote application when you tap on the note text. This action allows you to edit your Evernote note in the Evernote application that's set up on your device.

You can also create notes in the LightArrow application, and then sync those notes to Evernote (refer to Notes for more information about this procedure). After you sync your LightArrow app notes, you can edit them in the Evernote application. Drawings, media files, and handwriting are not synced. **Note**: Multiple blocks of text in your LightArrow app are combined into one note in Evernote.

1. Once you've set up Evernote for use as described above, tap on one of your notebooks or notes that's listed in the All Online Notes view (Notes + Files, Lists topic -> **Online Notes**). Synced notes and unsynced notes appear.
2. Tap on an unsynced note to open it in your Evernote app (you're required to have the Evernote app installed on your device for this to occur).
3. Alternatively, tap the cloud icon to sync a note. Syncing the note allows you to see the note directly in your LightArrow app; they appear as LightArrow app notes. When you type the text of a synced note, they're opened in your Evernote app.

How to work with Toodledo notes:

You can view your Toodledo notes directly from your LightArrow app (or) you can sync your Toodledo notes, which creates a LightArrow note and allows you to make changes within your LightArrow app or your Toodledo app and seamlessly view the changes. The first time you access a Toodledo note, you're required to log into the application in a web view. You can choose to save your credentials so you're not required to log in again.

You can also create notes in the LightArrow application, and then sync those notes to Toodledo (refer to Notes for more information about this procedure). After you sync your LightArrow app notes, you can edit them in the Toodledo application or the Lightarrow app. Drawings, media files, and handwriting are not synced. **Note**: Multiple blocks of text in your LightArrow app are combined into one note in Toodledo.

1. Once you've set up Toodledo for use as described above, tap on the Root folder (Notes folders) that's listed in the All Online Notes view (Notes + Files, Lists topic -> **Online Notes**). Synced notes and unsynced notes appear.
2. Tap on an unsynced note to open it in a Toodedo web viewer (you're required to log in).

3. Alternatively, tap the cloud icon to sync a note. Syncing the note allows you to see the note directly in your LightArrow app; they appear as LightArrow app notes. You can then make changes to the note in your LightArrow app and in your Toodledo app and they sync seamlessly.

CREATING AND MODIFYING NOTEBOOKS

You can create notebooks to organize notes for the purpose of viewing your notes by notebook. When you access the Notes view, you can group your notes by notebooks, as well as other aspects.

How to create, modify, and delete notebooks:

1. In the Notes + Files, Lists view, tap the **Notes** tile.
2. Choose **Group by: Notebook** from the selector.
3. Tap **Manage Notebooks**.
4. Tap an existing notebook to modify it.
5. To create a new notebook, tap the plus sign and type a title and description for a notebook in the New Notebook view.
6. Tap **Save**.

Note: If you wish to delete a notebook, tap the delete icon after opening it for modification.

CREATING AND MODIFYING CONTEXT TAGS

You can create context tags to organize notes for the purpose of viewing your notes by context tag. When you access the Notes view, you can group your notes by contexts, as well as other categories. Learn more about contexts by visiting My Contexts.

How to create, modify, and delete context tags:

1. In the Notes + Files, Lists view, tap the **Notes** tile.
2. Choose **Group by: Context Tag** from the selector.
3. Tap **Manage Context Tags**.
4. Tap an existing context tag to modify it.
5. To create a new context tag, tap the plus sign and type a name and color for a context tag in the New Context Tag view.
6. Tap **Save**.

If you wish to delete a context tag, tap the delete icon after expanding it.

CREATING, MODIFYING, AND SYNCING NOTES

To learn about creating, modifying, and syncing notes (with online notes services), refer to Notes.

UNDERSTANDING FOLDERS AND FILES

To learn about folders and **files,** refer to Folders and Files.

CREATING AND MODIFYING CHECKLISTS

To learn about creating, modifying, and creating checklists, refer to Checklists.

CREATING, MODIFYING, AND SHARING DRAWINGS AND HAND-WRITTEN NOTES

To learn about creating, modifying, and sharing drawings, refer to Drawings.

ASSOCIATING ITEMS WITH NOTES

The Notes + Files, Lists topic helps you to be more productive by allowing you to associate tasks, checklists, appointments, reminders, bookmarks, and files to notes. For example, if you're working on class notes, you might set up a checklist of things that you need to study for a test and you'll want to be able to easily see all checklist items associated with the class notes. By associating a checklists with the class notes, you have a central location to view these important study items.

How to associate a task with a note:

You can associate a note with a task or a task with a note.

Note: Anywhere you find a task in the app, you can open it, tap its **Associate Topic** tile, and select a note that you want to associate it with.

1. Locate a note by tapping the **Notes** tile in the Notes + Files, Lists topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing task, tap **Task** and select the task you want to add by tapping it.
5. If you're adding a new task, tap **Task** and add a name and due date, and then tap **Full Details** to add more information.
6. Complete the information for the task and tap **Save**.

How to associate a checklist with a note:

You can create a checklist in the Notes + Files, Lists topic and associate it with a note in the Notes + Files, Lists topic (or) you can associate a checklist to a task directly from the checklist.

1. Locate a note by tapping the **Notes** tile in the Notes + Files, Lists topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing checklist, tap **Checklist** and select the checklist you want to add by tapping it.
5. If you're adding a new checklist, tap **Checklist** and add a name and due date. Optionally add a comment.
6. Tap **Tap to add Checklist item** and add items to the checklist tapping **Save** as you create each one.
7. Complete the information for the checklist and tap **Save**.

How to associate an appointment with a note:

Creating an appointment is a common function that can be created in many areas of your app. If you wish to add an appointment directly to a note, follow the procedure below.

1. Locate a note by tapping the **Notes** tile in the Notes + Files, Lists topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing appointment, tap **Appointment** and select the appointment you want to add by tapping it.
5. If you're adding a new appointment, tap **Appointment** and add a name and start date.
6. Tap **Full Details** if you wish to add full dates, invitees, context tags, associated topics, location, and to choose the iOS calendar to be associated with the appointment.
7. Tap the tiles for the details you wish to add and complete the necessary fields.
8. Complete the information for the appointment and tap **Save**.

How to associate a reminder with a note:

Creating a reminder is a common function that can be created in many areas of your app. If you wish to add a reminder directly to a note, follow the procedure below.

1. Locate a note by tapping the **Notes** tile in the Notes + Files, Lists topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing reminder, tap **Reminder** and select the reminder you want to add by tapping it.
5. If you're adding a new reminder, tap **Reminder** and add a name and due date/time.
6. If you wish to add context tags and select a calendar for an iOS notification, tap the associated tiles.
7. Tap **Save**.

How to associate a bookmark with a note:

You can create a bookmark in the Bookmarks + Lockers topic and associate it with an item in the Notes + Files, Lists topic (or) you can associate a bookmark to a Notes + Files, Lists topic directly from the Notes + Files, Lists topic. For detailed information about creating bookmarks, refer to the Bookmarks + Lockers help.

1. Locate a note by tapping the **Notes** tile in the Notes + Files, Lists topic.
2. After you open it, tap the plus sign at the bottom of the view.
3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing bookmark, tap **Bookmark** and select the bookmark you want to add by tapping it.
5. If you're adding a new bookmark, tap **Bookmark** and type a URL for a bookmark or search for a bookmark and select it.

How to associate a file reference with a note:

You can create a file reference in the Notes + Files, Lists topic and associate it with a note. Files can be local or stored online.

1. Locate a note by tapping the **Notes** tile in the Notes + Files, Lists topic.
2. After you open it, tap the plus sign at the bottom of the view.

3. Choose **Create New** or **Choose Existing** from the menu depending on your choice.
4. If you're choosing an existing file reference, tap **File** and select the file reference you want to add by tapping it.
5. If you're adding a new file reference, tap **File** and select a folder and file.
6. If you don't see the file service you wish to use, you can set it up directly from the resulting menu by tapping **New** and completing the options for the file service.

Media

WHAT CAN I DO HERE?

The Media topic gives you the ability to manage audio, photos videos, drawings, bookmarks, services, and assets. You can organize the audio, photos, and videos you capture on your device, and you can associate them with related information in your LightArrow app.

GLOSSARY OF TERMS

Audio Albums: A collection of audio items created in your LightArrow app.

Photo Albums: A collection of photos created in your LightArrow app.

Video Albums: A collection of videos created in your LightArrow app.

Media Services: Items, such as print, audio, photo, or video products or labor you receive from companies, organizations, or individuals, such as Netflix, newspapers, or magazines (online or traditional). A touchpoint is provided to the Media category of services in the People + Services topic.

Media Bookmarks: Links to print-, audio-, photo-, or video-related web sites such as Netflix, newspapers, or magazines (online or traditional). A touchpoint is provided to the Media category in the Bookmarks topic.

Media Assets: Assets that you own that are related to media. Your flat screen TV, stereo system, and game console are all examples of media assets. A touchpoint is provided to the Media Services category in the Home + Assets topic

Media Projects: Print-, audio-, photo-, or video--related work items that you wish to accomplish. Connecting your new surround sound system and researching your next stereo system purchase are both examples of media

projects. A touchpoint is provided to the Media category in the Tasks + Projects topic

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Media and other topics. For example, if you define online media sources (such as Netflix or Shutterfly) or traditional media sources (such as your New York Times subscription) in People + Services, the information about those resources is also accessible directly from Media. Or, if you have defined media-related assets (such as your stereo system or Apple TV) in Media, the information about those resources is also accessible directly from Home + Assets. Or, if you have media-related projects you want to work on (such as connecting your new entertainment center or replacing the TV in your living room), you can define those projects in Media and they are accessible directly from Tasks + Projects.

CATEGORIES

Categories are available the Media topic. You can create, modify, hide, or delete categories via your LightArrow app.

ALERTS

Alerts display at the top of the Media view for anything related to media that are due within the next five days or currently overdue. For example, if you've set a task to pick up your dry cleaning, it will appear in the Alerts section.

CREATING MEDIA PROJECTS (NEW PROJECT / PROJECT VIEW)

A Media Project is a project for media-related items, such as print, audio, photo, or video products or labor you receive from companies, organizations, or individuals, such as Netflix, newspapers, or magazines (online or traditional). In your LightArrow app, you can associate several types of items to projects in order to efficiently plan them, and to organize them in a way that you can easily find the information that you need. For example, you can associate tasks, checklists, appointments, expenses, shopping items, files, and other items.

Refer to Projects to learn more about creating Media Projects.

CREATING AUDIO AND AUDIO ALBUMS

You can organize your audio items within albums. After you create an album, you can tap the album, and then tap the plus sign to add an audio item to this chosen album.

How to add an Audio Album:

1. Tap the Media topic.

2. Tap the **Audio** tile and then tap the plus sign.
3. In the **New Audio Album** view, tap the **Name** field and then tap a name.
4. Tap **Save**.

CREATING AUDIO ITEMS

Refer to Audio to learn more about creating audio items (recordings).

CREATING PHOTOS AND PHOTO ALBUMS

You can organize your photos within albums. After you create an album, you can tap the album, and then tap the camera icon to take/select a photo and add it to this chosen album.

How to add a Photo Album:

1. Tap the Media topic.
2. Tap the **Photos** tile and then tap the plus sign.
3. In the **New Photo Album** view, tap the **Name** field and then tap a name.
4. Tap **Save**.

CREATING PHOTO ITEMS

Refer to Photos to learn more about creating photo items.

CREATING VIDEOS AND VIDEO ALBUMS

You can organize your videos within albums. After you create an album, you can tap the album, and then tap the camera icon to take/select a video and add it to this chosen album.

How to add a Video Album:

1. Tap the Media topic.
2. Tap the **Videos** tile and then tap the plus sign.
3. In the **New Video Album** view, tap the **Name** field and then tap a name.
4. Tap **Save**.

CREATING VIDEO ITEMS

Refer to Video to learn more about creating video items.

CREATING DRAWINGS

Refer to Drawings to learn more about drawings and handwritten notes.

CREATING MEDIA BOOKMARKS

Refer to Bookmarks to learn more about creating media bookmarks.

CREATING MEDIA SERVICES

Refer to Services to learn more about creating media services.

CREATING MEDIA ASSETS

Refer to Assets to learn more about media assets.

CREATING MEDIA PROJECTS

Refer to Projects to learn more about media projects.

Bookmarks + Lockers

WHAT CAN I DO HERE?

The Bookmarks + Lockers topic enables you to manage all your web bookmarks, credentials for online services, and other secret data such as PIN numbers, credit card numbers, photos of personal information, and recordings of personal information. For example, if you use websites that require a login and password, you can securely store that information through Bookmarks. In addition, if you have multiple PINs that you're required to remember or you would like to take photos of your credit cards for safekeeping, you can utilize Lockers to manage those items. Imagine you're traveling and your wallet is stolen. Through your LightArrow app on your device, you can find all the information for your credit cards, and you can immediately call your credit card companies to communicate the information for cancellations.

Keep in mind, your data is always stored only on your device, unless you choose to use Cloud sync via Dropbox, Box, or other cloud services. In addition, your LightArrow secret data is secure with military grade 256-bit Advanced Encryption Standard (AES) encryption. The Advanced Encryption Standard (AES) is one of the most commonly used and secure encryption algorithms available today.

GLOSSARY OF TERMS

Bookmarks: Bookmarks allow you to save the address (URL) of a website or web page so that you can easily re-visit the page at a later time. In your LightArrow app, bookmarks also allow you to manage usernames and passwords for sites that require this information, such as sites for banking, shopping, and others. This way, you don't have to memorize a variety of passwords.

Lockers: Lockers allow you to save secret information for any information you wish to secure. Lockers support securing of text, photos, and audio. Common uses include storing of photos of credit cards, photos of passports, photos of secret receipts, sensitive audio files, and PINs.

Online Services: "Online services" are internet-related products or labor you receive from companies, organizations, or individuals. Web hosting, internet access, and photo sharing are all examples of online services.

Services: Work or help that you receive from others such as personal care, auto care, home maintenance, contract work, etc.

TOUCHPOINTS

Touchpoints allow relevant information to be shared seamlessly between Bookmarks and the People + Services topic. For example, you can define access information for services such as your electric utility account directly in People + Services. Via the touchpoint to that topic, the information is also accessible from Bookmarks. Or, you could define the billing and payment website for your ISP account directly in Bookmarks and, via the touchpoint to that topic, the information is also accessible from People + Services. Online Services is a touchpoint to the Online Services category in the People + Services topic. This means that online services defined here will appear as services in the Online Services category in the People + Services topic.

CATEGORIES FOR BOOKMARKS + LOCKERS

Categories are available for use with bookmarks. You can create, modify, hide, or delete categories via Settings. When a bookmark category is deleted, it is completely removed from your LightArrow app. When a bookmark category is hidden, it no longer appears in the Categories for Bookmarks section, but it remains defined and is still available in the category list when you are defining a new bookmark. Note that bookmark categories that are in use or serve as touchpoints to another topic cannot be deleted or hidden.

BEFORE YOU START - SETTING UP YOUR PIN

Before you start using bookmarks and lockers to secure your secret data, it is necessary to set up a PIN in your Settings. Go to your help for Secure Your Data to learn how.

Refer to Bookmarks to learn about bookmarks.

Refer to Lockers learn more about lockers.