

# ListMaker

Version 1.7

## Instructions for Use Synergy Solutions, Inc.

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### 1. Overview

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#### 1.1. Introduction to ListMaker

ListMaker, as the name implies, helps you make lists. The feature of ListMaker that makes it special is that it keeps with each list a set of common items. A grocery list is a good example of a list almost everybody makes so we'll use it to help describe ListMaker. Attached to your grocery list you can have a set of common items such as milk, eggs, bread, and anything else you might ever need at the grocery store. When it comes time to go to the store, i.e. make your list, you can check off from your set of common items the things you need to get and tap "Update" and they are added to your list.

You can attach dates to ListMaker items so ListMaker can also serve as a to do list. You can keep commonly used tasks such as, "Pay Credit Card Bill" in your common set and when it comes in the mail you can add it to your list and attach the due date to it.

ListMaker was designed to be general, versatile, easy to use for the novice, and powerful enough for the advanced user.

#### 1.2. Meta-Lists

You can use ListMaker to make all kinds of lists, here are some that we thought of: Grocery list, list of things to get at any other store, list of books you want to read/buy, list of CDs you want to buy, list of movies to rent, your car maintenance schedule, list of chores that need to be done, list of steps of a procedure, list of uses for ListMaker...

We will be building a web page on "Uses for ListMaker" so if you come up with an interesting use of ListMaker, please email it to us at [listmaker@synsolutions.com](mailto:listmaker@synsolutions.com).

### 2. Getting Started

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#### 2.1. Installation

For detailed installation instructions please see the Install manual. Palm OS version 2.0 or greater required. Install the “ListMaker.prc” file.

## 2.2. First Use

**\*\* IMPORTANT: If you are upgrading from a previous version of ListMaker or from the ListMaker Demo read this.** If you installed one of the ListMaker sample databases (e.g. “LMShopping.pdb” or “LMTravel.pdb”) and made changes to the database(s) that you wish to keep, do not install the sample databases again or they will overwrite the database on your Palm handheld. (Any database installed onto your Palm handheld will overwrite any database with the same name so if you install LMShopping and you have a database called “Shopping” on your Palm handheld, the database on your Palm will be erased and the installed one will be there.) If you wish to install the sample database again, you can change the name of the database on your Palm handheld by choosing “Database Details” from the Database menu and change the name of your database. (You should do this anyway, to avoid this problem in the future.)

- **If you are updating from a previous version of ListMaker read this:**

You will need to update your ListMaker database to the new format; ListMaker will do this automatically. Backup all data first by performing a HotSync. The update is a one-time-only operation and it can take a minute or so depending on how many items you have in your old lists. After the update is done your lists are ready to be used in ListMaker.

When you run ListMaker you will be presented with an Open Database window. Tap the “Open” button to open your ‘ListMakerDB.’ To change the name of your database, choose “Database Details...” from the Database menu.

- **If you have never owned a previous version of ListMaker read this:**

When you run ListMaker for the first time you will be presented with a New Database window. Enter a name for your database and tap “OK.” Now you’re ready to start using ListMaker.

## 2.3. What You See

Once you’ve updated you old ListMaker data or created your new ListMaker database you’ll see the ListMaker list view screen. The name of your database is at the top-left of the screen and the current category is at the top-right of the screen. There are four buttons along the bottom of the screen: two New buttons (one for new item, same level; one for new item, as child), the Common button (which takes you to the common view), and the “LM!” button (which pops up a list of commonly used functions).

## 3. Databases

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### 3.1. Overview

ListMaker supports the use of multiple databases. This means that you can have a shopping list database, an auto maintenance record database, a classroom attendance database, a to do list database, a project task list database, and so many more. This also means that you can pass databases around to your friends, co-workers, or family and they can install them and use them too.

### 3.2. Working with Databases

*Note: the following operations can only be done from the list view and not in the common view. There is no Database menu in the common view.*

#### 3.2.1. Creating Databases

You can create a new database by choosing “New Database...” from the Database menu. You will be presented with the New Database window. Enter the name for your database and check whether you would like it to have one common set for all categories in the database or one common set for each category in the database. Tap “OK” and it’s made.

You cannot create two databases with the same name nor can you create a database with a space as the first character; any other name is legal.

#### 3.2.2. Opening Databases

You can open a database by choosing “Open Database...” from the Database menu or by choosing “Open Database” from the “LM!” popup list. (If you only have one ListMaker database, ListMaker will tell you.) Choose a database from the list and tap “Open” to open it.

#### 3.2.3. Database Details

To access the details of a database choose “Database Details...” from the Database menu. From this window you can change the name of a database as well as its one-common status. You cannot have two databases with the same name nor can you have a database with a space as its first character. If you change a database from being one-common to not one-common, all of your common items will be in the Unfiled category. If you change a database from not one-common to one-common, all of your common items will be merged together and will all be in the same common set.

### 3.2.4. Deleting Databases

To delete a database choose “Delete Database...” from the Database menu. Choose a database from the list and tap “Delete” to delete it. If you delete the currently opened database you will be prompted to open another database. If you delete the only database, you will be prompted to create a new database.

### 3.2.5. Beaming Databases

If you have a Palm handheld with an IR (infra-red) port then you can beam data to another person’s Palm handheld.

ListMaker can beam databases. Choose “Beam Database...” from the Database menu and you will see a list of all available ListMaker databases. Choose a database and tap “Beam” to beam the database.

When you receive a beamed database you’ll need accept the database first. If the database being beamed to you has the same name as a database you have on your handheld you’ll have a choice to make. Either you can choose to rename the existing database or cancel the beam. Remember that if you choose to rename the database you’ll be renaming the existing database and not the beamed database.

For more information on beaming data between handhelds, read your Palm manual.

## 3.3. One-Common

A great feature of ListMaker is the ability to have one set of common items for all lists in a database. This means that you can have, for example, a master shopping list in the common view and have each of your lists be for a different store. Because you can get some of the same items at the drug store as you can at the grocery store, you can have this master list accessible by the drug store list as well as the grocery store and all of the other lists in that database.

This opens up a whole new set of possibilities. A class roster in the common set can be accessible to every list for attendance records. A set of tasks can be accessible to many different project task lists... So how do I use it?

The one-common setting is specific to each database so you can have one database in which there is one common set for *all* lists and another database in which there is one common set for *each* list. You have to choose this setting when you create any database but you can also change it at any time by accessing the database details (see §3.2.3, above).

If you change a database from being one-common to not one-common, all of your common items will be in the Unfiled category. If you change a

database from not one-common to one-common, all of your common items will be merged together and will all be in the same common set.

### 3.4. Database-Specific Preferences

Along with the one-common setting, there are other preferences and settings that are database-specific. These settings are saved in the database itself which means that if you distribute a project task-list database to everyone in the project team these preferences will go with it.

- The **current category** is database-specific. For example, if you have a database, “New York Project” opened to the “Team Phone List” category and you open another database, when you come back to the New York Project database, you will still be in the Team Phone List category.

- All of the **sort settings** are database-specific. This includes Sort Checked at End, Always Sort, Hierarchy Sorting, and Sort First preferences. These preferences are also list-specific. If you have Always Sort set for all lists in a database that setting will go with the database if you pass it around.

- All of the **general, list-specific** settings are database-specific. This includes Show Dates, Show Popup Triggers, and Show Custom Fields. If you have a database set up to be a to do list with the dates showing, this setting will follow the database if you give it to you co-workers (or anyone else).

### 3.6. Backing Up and Sharing

Whenever you create a new ListMaker database ListMaker sets its backup flag (backup bit). (Jargon alert! set is on, clear is off.) All databases with the backup flag set will be copied to the desktop during HotSync. ListMaker never touches the backup flag after it creates the database. If you are using a backup utility such as Launch ‘Em’s BackMeUp plugin to set the backup bits of ListMaker’s databases you know now that ListMaker only sets it one time and never sets or clears it again.

When you HotSync and your ListMaker databases are backed up they appear on your desktop computer as “LM[database name].PDB” or as “LM[database name].” The [database name] is the name that you have chosen for the database in ListMaker. These files appear in different places depending on whether you have a Mac, a PC, or a UNIX machine but the general rule of thumb is: “in a directory/folder called Backup (or Backups) which is in a directory/folder that resembles your Palm user-name which is in the ‘Palm’ directory/folder.” The directory/folder that resembles your Palm user-name may or may not be in a directory/folder called ‘Users.’ The sure-

fire way to find your backed up ListMaker databases is to do a find-file on “LM[database name].”

Once you get a hold of these files you can pop them on a floppy, attach them to an email, or put them on a web site. You can pass these files around to other ListMaker users! You can install them the same way you install the ListMaker program file (ListMaker.prc), just install and HotSync.

Now you can create a project task list to distribute to all members of the project team, pass on your grocery list to your husband, or give your wish-list to the buyer.

## **4. List Items**

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### **4.1. List Item Introduction**

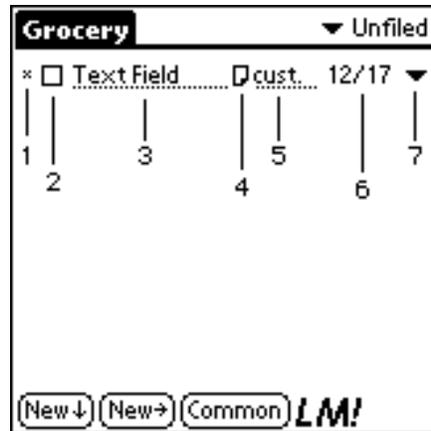
A list item is any item in your list. Make a list item. Go to the list view and tap either “New” button. What you should see is a little “x” looking icon, an unchecked check box, a dotted line with a cursor blinking in it, and an arrow that points down (the arrow is only present in the list view). This is an empty list item. Now you can write whatever you want. *Note: you can also create a new item if you begin writing in the graffiti recognition area or paste something from the clipboard when no item is selected (if type-to-scroll is turned off).*

### **4.2. Controls On The Item**

There can be up to seven different parts of a list item at a time.

From left to right they are:

- 1) Hierarchy control
- 2) Checkbox
- 3) Text field
- 4) Note indicator
- 5) Custom text field (only in list view)
- 6) Date field
- 7) Popup trigger (only in list view)



The hierarchy control is one of three things: an “x” looking icon, an arrow that points to the right, or an arrow that points down. Any item that has no children items has an “x.” Any item that has children items has either of the arrows. The right-pointing arrow indicates a ‘turned-up’ parent—the children are not showing. The down-pointing arrow indicates a ‘turned-down’ parent—the children are showing.

The check boxes serve different purposes depending on which view you are in. In the list view it can be used as a way to indicate if an item is done or completed or as any other type of flag. (For example, in your grocery list you can check off the items as you put them in your cart.) In the common view the check box is used to indicate whether or not an item is in the current list view. In the list view the “Purge List” menu command will remove all checked items from the list. Likewise, in the common view the “Delete Checked Items...” menu command will remove all checked items from the list. You can check items on or off and tap the “Update” button to change the contents of your list.

The text field is where you can enter the main text of your list item. This is easy.

The note indicator shows you if an item has a note attached to it. You will notice that any list item that has a note attached to it will have a small picture of a note at the right side of the text field. To add a note to an item, select it (tap in it) and choose “Attach Note...” from the List Menu. Once an item has a note attached to it, you can edit the note by tapping on the picture of the note.

The custom text field is only available to items in the list view. This is a smaller text field for storing smaller bits of data such as a quantity. This field does not affect whether a list item matches a common item. If you copy a list item to the common view its custom field data will not be copied.

The date field is a field for storing a date. This is similar to the functionality of the To Do List. Now ListMaker can be used as a To Do List.

The popup trigger at the far right of the list item is also only available to items in the list view. If you tap on an item’s popup trigger it will popup a list relevant to that item. It provides a quick and easy way to add list items

(and their parents and/or children) to the common view. There may be choices such as “Add item to Common,” “Add item & children,” “Add item & parents,” and “Add item @ base.” Adding an item “@ base” means that it will add an item at level 0, hierarchically. (Newly created items are at level 0, their children are level 1, their children’s children are level 2, etc.) If the list’s only choice is “Nothing to do” it means that the list item is already in the common set.

You can choose to show or not show the custom field, the dates, and the popup triggers. These settings are in the General Preferences and are list-specific and database-specific. For more details on the preferences, see the Preferences section.

### 4.3. Hierarchy

ListMaker’s items are hierarchical. This means that you can sub-categorize items or use ListMaker as an outliner. An item that has other items under it will be referred to as a ‘parent’ and the items underneath will be referred to as its ‘children’ (or ‘child’ items).

Try making a parent and a child. Go to the list view. Tap either “New” button; this will create an item at the top of your list. Now write a few letters into the item. Now tap the “New ” button. You’ll see that the new item is indented and the parent item’s hierarchy control is a turned-down arrow. Write some letters into the child item.

The hierarchy control of the parent is used to show or hide its children. Tap on the parent’s arrow to turn it up and hide the child.

Now if you turn down the parent again and select the child item and tap on the “New ” button you will create another child at the same level as the first child.

When you have an item selected the “New ” button will create an item at the same level as the selected item and the “New ” button will create an item as the selected item’s child.

If you tap the “New ” button when you have an item selected that has children it will add the new record after all of its children. For example, if you have ‘Veggies’ selected (left, below) and you want to add ‘Fruits’ you’ll tap “New ” and the new item will be created as shown (right, below):



Sometimes you can run into the situation where the next spot to put an item is below the screen. In this case the list will be scrolled to the proper position.

If you create a new child under a turned-up parent the parent will be turned-down and the children will show.

The maximum hierarchy level in ListMaker is 7.

#### 4.4. Duplicate Items

Because of the matching that goes on between items in the list view and common items ListMaker does not allow duplicate items. Duplicate items are items that have the same text, same note, same date, are either under the same parent at the same level or are both at level 0, and are in the same view of the same list. Whew.

If you create an item that exactly matches another in the list (and you have “Warn About Duplicates” checked) a warning will pop up that tells you that a duplicate was found and it will ask you if you want to delete the new item or edit it. If you don’t have the “Warn About Duplicates” preference set duplicate items will be automatically deleted.

#### 4.5. Dragging Items Around (what a drag-n-drop!)

If you tap and hold down on an item in a list it will become selected for dragging. The picture below shows the “Peppers” item selected:



Once the item is selected like this you can drag it around the screen to a new spot in the list. Once you drag an item away from where it started the drag indicator will appear. The drag indicator is a line attached to a square that fits around the checkbox. It will show where the item will be placed if you drop it. The picture below shows Peppers selected and the drag indicator showing that Peppers will be dropped where Corn is:



The following picture shows what the list looks like after Peppers has been dropped. Notice that the items “Green” and “Red” have been moved with Peppers. Whenever you drag items the item’s children will always move with it.



The drag indicator is 'smart' and won't let you put items where they don't belong. The following sequence of pictures shows a new item, "White," being made and dragged under "Onions." Notice that Onions is turned-up before the drop and turned-down after the drop.



If you drag an item above or below the list on the screen it will scroll if possible.

If you tap and hold on an item and the item becomes selected for dragging and then you let up over the same spot, it will treat what you have done as a tap in the item and the item may become selected for writing, the checkbox may become checked or unchecked, the hierarchy control may be toggled, etc. So watch out for that.

#### 4.6. Checkboxes

In addition to the two, previously known, checkbox states, on and off, there is a third state in ListMaker. This state is partial. It is best shown in pictures. Besides, I don't have time to write a thousand words about ListMaker's checkboxes.

In the picture below the "Red" item's checkbox has been checked. Notice that "Onions," "Veggies," and "Produce" are partially checked. This partial check indicates that some of the item's children are checked and some are not. (An item with no children can never be partially checked.)



In the following picture the "White" item has been checked. Notice that Onions has become fully checked.



In the following picture the “Peppers” item has been checked. Notice that “Green” and “Red” are also checked. Whenever an item is checked all of its children are also checked. If the Produce item was checked, all of the items would be checked (but you know what that would look like).



## 4.7 Item Details

### 4.7.1 Details, Details

To access an item’s details, choose “Item Details...” from the List menu. From the details window you can copy the item to a different view and/or list, move the item to a different view and/or list, or delete the item.

### 4.7.2. Copying Items

To make a copy of an item into a different list and/or view tap the “Copy...” button in the Details window. Choose whether you would like to copy the item to the list view or the common view and choose what category you would like to copy it to. Tap “Copy” to copy the item.

If the item you want to copy has children there will be a “Children” checkbox showing. Check this box if you want to copy the item’s children along with the item.

### 4.7.3. Moving Items

Moving an item is similar to copying an item. However, while copying an item leaves the original where it was, moving an item does not. The Move window looks just like the copy window. Choose the category and the view (list or common) to which you would like to move the item.

If the item has children the children checkbox will show and it will be checked but you will not be able to uncheck it. If you moved an item and not its children the children would be stranded and we don’t want that to happen.

#### 4.7.4 Categories, Matching, Hierarchy Level

If the current database is set to one-common and you choose “Com. View” in the Copy window the category popup trigger will be disabled and set to Unfiled. This is because if you have a database set to one-common all of the common items are in the Unfiled category and no other categories are valid.

Sometimes you will not be allowed to copy or move an item to the destination you specified. That is because there is an identical item there. (See §4.4 above about duplicate items.)

When you copy or move an item it will always be placed at level 0. If you want it at a different level you can move (drag) it after you copy or move it.

#### 4.8. Deleting Items

There are many ways to delete list items. One way is to choose “Delete Item...” from the List menu when you have an item selected. Another way is to delete all of the text of an item then tap somewhere outside of the item. A third way to delete items is the “Purge List...” menu command in the list view or the “Delete Checked Items...” menu command in the common view. These commands will remove all of the checked items from the view. Of course, as mentioned above, you can delete an item from the Details window.

***Important:*** deleting an item will always delete its children.

### 5. List View and Common View

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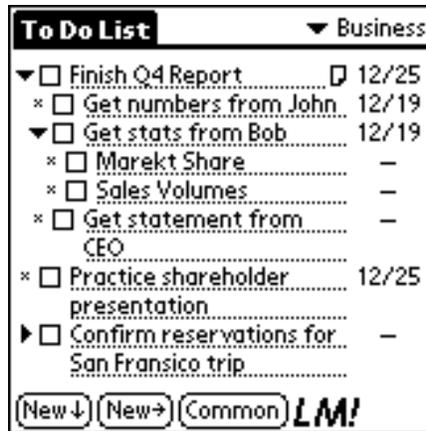
#### 5.1. Introduction To Views

There are two main views in ListMaker, the list view and the common view. The list view is generally used as the working area while the common view is used to store commonly used list items. To get to the common view from the list view tap the “Common” button.

#### 5.2. List View

##### 5.2.1. Function And Uses

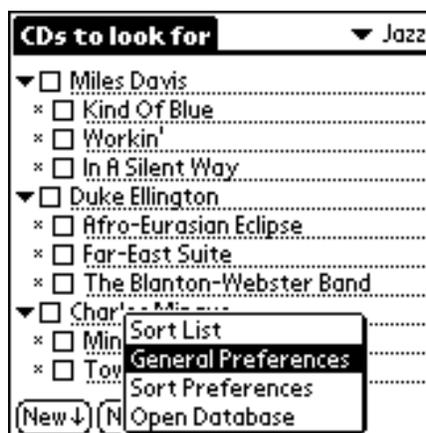
The picture below shows the list view:



The list view is your working area. You can keep your working lists here. There are 16 categories (15 and Unfiled). The name of the current database shows in the top-left of the screen and the name of the current category shows in the top-right of the screen.

### 5.2.2. Buttons

There are five buttons on the list view: the category popup list trigger, the two “New” buttons, the “Common” button and the “*LM!*” button. The category popup trigger will popup a list of categories (you should be familiar with this. The two New buttons will either add a new item at the same level as the currently selected item or as a child of the currently selected item. (See §4.3 above for more on hierarchical items.) The Common button will take you to the common view. The *LM!* button will popup a quick-list of useful items as seen below:



### 5.2.3. Menus

There are four menus in the list view: List, Edit, Database, and Options:



The **List** menu:

- **Delete Item** will delete the currently selected item and its children. If there is no currently selected item, ListMaker will complain. It will confirm the delete with you.

- **Attach Note...** will attach a note to the currently selected item. You will be brought to the note view to edit the note text. If there is no currently selected item, ListMaker will complain.

- **Delete Note** will delete the note of the currently selected item. If there is no currently selected item, ListMaker will complain. If the currently selected item has no note, nothing will happen.

- **Item Details...** will open the details window for the currently selected item (see §4.7 above for information on details). If there is no currently selected item, ListMaker will complain.

- **Sort List** will sort the current list. See §6.2 below for more information on sorting lists.

- **Purge List** will remove all checked items from the current list. It will confirm the purge before it happens.

- **Check All** will check all of the items in the list.

- **Uncheck All** will uncheck all of the items in the list.

- **Expand All** will turn down all hierarchy controls so that all children will be showing.

- **Collapse All** will turn up all hierarchy controls so that all children will be hidden.

The **Edit** menu is the same as other edit menus in other Palm applications such as To Do List and Memo Pad. The choices are Undo, Cut, Copy, Paste, Select All, Keyboard, and Graffiti Help.

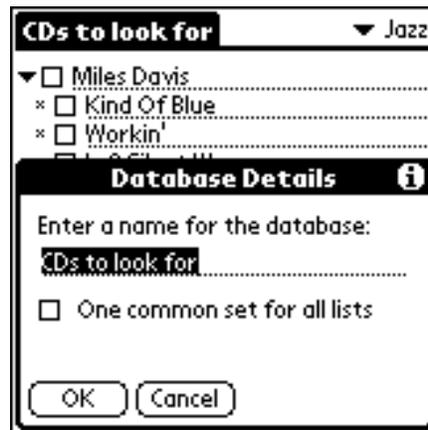
The **Database** menu:

- **New Database...** will open the New Database window and allow you to create a new database.

- **Open Database...** This will open the Open Database window. If there is only one database on your Palm handheld and it is currently open ListMaker will tell you so.

- **Delete Database...** This will open the Delete Database window and allow you to delete a database. If you delete the currently open database you will be prompted to open a new database with the Open Database window. If you delete the last database you will be prompted to create a new database with the New Database window.

- **Database Details...** This will open the Database Details window, shown below. You can change the name of the database and the one-common status of the database here.



For more information on databases see §3, above.

The **Options** menu:

- **General Preferences...** brings you to the general preferences screen. For more information on general preferences see §6.1, below.

- **Sort Preferences...** brings you to the sort preferences screen. For more information on sort preferences see §6.2, below.

- **Phone Lookup...** does a phone number lookup in the address book. This allows you to paste phone numbers onto your list items.

- **Import/Export...** launches the LM I/E import/export utility for ListMaker.

- **About ListMaker** brings up the info box. It has the version number of the ListMaker you are using as well as the author's name; damn, he's good.

#### 5.2.4. Categories

You can have up to 16 categories in ListMaker (15 and Unfiled) per database. Because ListMaker supports multiple database, there is no limit

imposed by ListMaker on the number of lists you can have. Each category can have any number of list items in it. Have fun.

### 5.3. Common View

#### 5.3.1. Function And Uses

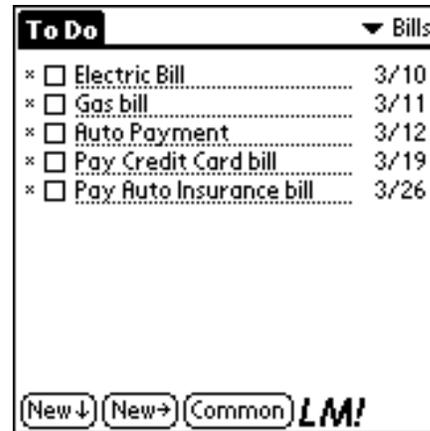
The picture below shows the common view:



The common view is a sort of “storage” area for list items. Using the grocery list example, you can keep all of the grocery items you might ever need to get in the common set and add them to you working list as you use them. The common view operates similarly to the list view. There are a few differences, which will be discussed below.

#### 5.3.2. Checkboxes

The checkboxes in the common view serve a different purpose than the checkboxes in the list view. (That’s because the checkboxes in the list view don’t actually *do* anything.) The checkboxes in the common view indicate whether or not the common item has a match in the current category’s list view. The pictures below show a common view and the corresponding list view:



(In this example the database is set to one-common so all of the common items are available to all of the categories.)

In the common view the checked items are the ones that are also in the list view. If you check more items and tap the “Update” button it will add the newly checked items to the list. If you uncheck currently checked items and tap Update the unchecked items will be removed from the list.

### 5.3.3. Buttons

There are five buttons in the common view (not counting the scroll arrows). There are the two “N” buttons; they are the new item buttons. They work the same way as the New buttons in the list view work. The “Upd.” button stands for Update. This will update the list view to any changes you make to the checkboxes in the common view and return you to the list view. Tapping “Done” will also return you to the list view but it will make no changes to the list view. The “LM!” button also pops up a quick-list of useful items. The only one it doesn’t have is the “Open Database” choice. No database operations can be performed from the common view.

### 5.3.4. Menus

There are three menus in the common view and they are the same as their counterparts in the list view. There are the List, Edit, and Options menus. There is no Database menu because database operations are not allowed in the common view. The menu items in the three menus are also exactly the same as their counterparts in the list view menus, barring the “Delete Checked Items...” menu command (see §5.2.3, above for the functions of the list items). This command removes the checked items from the common view just as Purge does from the common view. if you choose this command, you will be asked if you want to delete the matching list items.

### 5.3.5. Categories & One-Common

You cannot change the category when you are in the common view. The category popup trigger shows and that indicates what the current category is. If you add items to the list view they will be added to that category.

If the current database is set to one-common then all of the common items will be available to all of the list view categories. (In this case the common items are all in the Unfiled category.) If you have one-common turned off for the current database then each category will have its own set of common items.

### 5.3.6. Paradigm Change From ListMaker 1.0 (1.01)

*If you are not upgrading from a previous version of ListMaker you can disregard this section.*

Unlike ListMaker 1.0 the common items and the list view items are now copies of each other. They are not the same item “showing” in different views. The implication this has is that if you edit the text of a common item that has a match in the list view it will become unchecked and it will not match the list view item anymore. It will not change the text of the list view item.

## **6. General Preferences & Sort Preferences**

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### **6.1. General Preferences**

#### 6.1.1. Getting To The Preferences

To access the general preferences you can choose “General Preferences...” from the Options menu in either the list view of the common view or you can choose “General Preferences” from the *LM!* popup list in either view.

#### 6.1.2. Application Preferences

These three settings are global for all lists, all categories, all views, and all databases. These are ListMaker preferences.

- **Warn About Duplicates** if this is set you will be warned when ListMaker finds that you have created a duplicate item. If it is not set the duplicate item will be automatically deleted.

- **Type To Scroll** if this is set you will be able to scroll to a letter of a list that has the “Always Sort” setting turned on. This is similar to the function in the Address Book that allows you to scroll down to a name by writing in the first letter of the last name except that you can only enter in

one letter to scroll to. If Type To Scroll is turned on a short horizontal line will appear in any list that has Always Sort set and therefore Type To Scroll is active. The picture below shows the Type To Scroll indicator in the lower-left portion of the screen and show Type To Scroll in “action.”



Notice the “L” in the middle of the screen. When Type To Scroll is active (as the indicator in the lower-left shows) any letter written into the graffiti recognition area is taken by Type To Scroll and drawn up in the middle of the screen as this L has been. Then the list will be scrolled to the first item that begins with L that it finds.

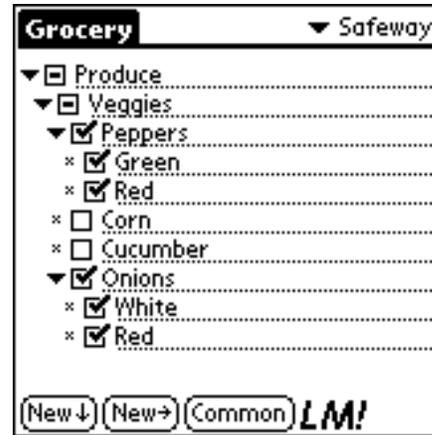
If the “Sort First...” setting is set to “By Date” then the Type To Scroll will scroll to numbers instead of letters because the list will be sorted by date. It will scroll to the number of the month.

### 6.1.3. List-Specific Preferences

The list-specific preferences are specific to each list (category) and are saved in the database so that they will get passed with the data of the database. These settings determine what will show in each list view.

- **Show Dates** will show or hide the date field.
- **Show Popup Triggers** will show or hide the popup triggers (list view only).
- **Show Custom Fields** will show or hide the custom fields (list view only).

Below are two shots of the list view: one with all three settings on and one with all three settings off.



## 6.2. Sort Preferences

### 6.2.1. Getting To The Preferences

To access the sort preferences you can choose “Sort Preferences...” from the Options menu in either the list view of the common view or you can choose “Sort Preferences” from the *LM!* popup list in either view.

### 6.2.2. The Preferences

- if **Always Sort** is turned on the current list will always be kept sorted. Any new item entered into the list will be sorted into place after it is created.

- **Sort First...** determines how the list will be sorted. There are six choices for sort ordering and there are three keys to sort on. The three fields that can be used as sort keys are the text field, the custom field, and the date field. You can choose one of the six choices. For example, “Alpha-Custom-Date” will sort, first, the text field alphabetically, any ties will be broken by comparing the custom field, and any further ties will be broken by comparing the dates.

- **Hierarchy Sorting** determines which items will be sorted. If “Base Level” is checked only the level 0 items will be sorted and the children will not be sorted at all. If “All Levels” is checked then all items in the list will be sorted.

- **List View Sorting** if “Sort Checked At End” is checked then the checked items will be sorted at the end of the list. This setting applies only to the list view and not the common view.

All of these settings are list-specific and are saved in the database. This means that you can have one category set to Always Sort and in another that option can be turned off.

### 6.2.3. Sorting Any List

Any list can be sorted by choosing the “Sort List” option from the List menu or by choosing “Sort List” from the *LM!* popup list.

Any sort will pay attention to the “Sort First” setting in the sort preferences.

### 6.3. One-Common

If the database is set to one-common (see §3.3, above) the sort settings are also specific to the common view as well as each list view category. The Sort Checked At End setting doesn't apply to the common view so that setting does not appear in the sort preferences panel.

### 6.4. Manual Sorting

If the “Always Sort” preference is turned off, then manual sorting is enabled. To move an item within a list, tap on the item and hold the pen in place until the item becomes highlighted. Once it is highlighted you can drag the pen up or down until the move indicator is at the location to which you want to move the highlighted item. When you let the pen off the screen, the item will move to the desired location. If you do not hold the pen in place until the item becomes highlighted then you cannot drag it to a new spot, so be patient.

For more information on drag-and-drop see §4.5, above.

### 6.5. Make Default

Both preference panels have a “Make Default” checkbox in the lower-right portion of the screen. If this box is checked when you tap “OK” the current settings will become the default settings for any new database you create. In the sort preferences if you have Always Sort, Alphabetically, Base Level, and Make Default checked and you tap OK and you create a new database every category's settings will be Always Sort, Alphabetically, and Base Level.

## 7. Import and Export

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### 7.1. Introduction

ListMaker has the ability to import and export items to and from ListMaker.

Below is a picture of the Import/Export screen. The ListMaker information is on the left side of the screen and the To Do List or Memo Pad information is on the right side of the screen.



First, choose the ListMaker database that you would like to use by tapping the “Database...” button. This will bring up the Open Database window and you can choose the ListMaker database you would like to use. Use the “Category” popup trigger to choose the category after you have chosen the ListMaker database. The “List View” and “Common View” checkboxes will let you choose whether you would like to import/export items to/from the list or common view of ListMaker. As you might guess, the “Export ” and “ Import” buttons determine whether the operation will be an export or an import...

## 7.2. Import

ListMaker can import items from the To Do List and from the Memo Pad.

When importing from the To Do List the item’s text, note, and date are imported into ListMaker. If you import To Do List items into the ListMaker list view the checked status is also imported.

When importing from the Memo Pad the “Memo I/E Delimiter” preference becomes important. This is the character that is used to separate ListMaker items to be imported in the memo’s text. For example, if the Memo I/E Delimiter is “Return” then a return character (line break) will denote the difference between two ListMaker items-to-be. This means that you will have to type this character into the memo to be imported between each piece of text that you want to become a ListMaker item. In the example below, you see three screen shots. The first screen shows the memo if the Memo I/E Delimiter is to be a return character; the second shows the memo

if the Memo I/E Delimiter is to be a comma (“,”); the third screen shows the resulting ListMaker list after an import is performed.

Memo 2 of 4 Unfiled

One  
Two  
Three  
Four  
Five  
Six  
Seven  
Eight  
Nine  
Ten

Done Details

Memo 3 of 4 Unfiled

One, Two, Three, Four, Five, Six, Seven,  
Eight, Nine, Ten

Done Details

Numbers Unfiled

- \*  One
- \*  Two
- \*  Three
- \*  Four
- \*  Five
- \*  Six
- \*  Seven
- \*  Eight
- \*  Nine
- \*  Ten

New↓ New→ Common LM!

The “Hierarchy Character” is the character used to denote a level of hierarchy when importing (or exporting) memos or To Do items. You can set the hierarchy character to be any character you choose, a tab, a dash (“-”), or even a “w” (although this wouldn’t be recommended). The best way to explain this is to show you in pictures. The screen shots below show a memo and a to do list before import using a tab as the hierarchy character and the resulting ListMaker list.



### 7.3. Export

ListMaker can export ListMaker items to the To Do List and the Memo Pad. Choose export and choose the To Do List or Memo Pad using the popup trigger at the top-right of the screen.

When exporting to To Do List item the text, note and date are copied to the new To Do List item. When exporting from ListMaker's list view the custom field and the checked status is also copied to the new To Do List item. The custom field text is inserted into the text field after the ListMaker text and a tab character.

When exporting to the Memo Pad the ListMaker items will be written to a memo, each field (text, custom, and note) separated by a tab and each item separated by the Memo I/E Delimiter character. If the List being exported cannot all fit into one memo a new memo will be created.

The "Insert hierarchy character on Export" preference setting will insert the Hierarchy Character you have chosen at the beginning of the text field for each level of hierarchy of the ListMaker item.

### 7.4. Preferences

- the **Memo I/E Delimiter** is only relevant when importing or exporting from or to the Memo Pad. It is the character that is placed between ListMaker items on an export and it is the character that ListMaker looks for in the memo to decide when to make a new ListMaker item while importing a memo.

- if **Delete To Do or Memo Items After Importing into ListMaker** is checked the imported To Do List items or memo will be deleted after they are imported into ListMaker.

- the **Insert hierarchy character on Export** setting will insert the hierarchy character at the beginning of the text field for each level of hierarchy the ListMaker item.

- the **Mind hierarchy character on Import** setting allows you to create hierarchical items on an import into ListMaker. Each hierarchy character at the beginning of the To Do List item's text field or memo's new ListMaker item is interpreted as a hierarchy level. The import function is smart enough to take out extra tabs where they don't belong.

- the **Hierarchy Character** is the character that is used for the two above preference settings. It's default is a tab character (see graffiti reference) but other useful characters might be a period ("."), a dash ("-"), or an underscore ("\_").

## 8. Conclusion

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That's all for ListMaker. The official ListMaker email address is [listmaker@synsolutions.com](mailto:listmaker@synsolutions.com). If you have any questions about ListMaker or

any other Synergy Solutions products please send email to  
info@synsolutions.com. To report bugs send email to  
bugs@synsolutions.com. To get help email support@synsolutions.com.  
Thank you for using ListMaker.