



## Reference Guide

This guide is continually updated on [lockethome.com](https://lockethome.com)

Homebase – The control center for Locket, it allows you to easily maneuver through the system. When you are using Locket, click on EXIT or OK in the upper right corner of a list, detail or calendar screen to return to Homebase.

Homebase Buttons – Homebase contains three main sections, Medical Information, Emergency Contacts and Home and Family. These sections are accessed through buttons. To view information, click on the button. To view more detailed information by category, click on the drop-down menus located on the right end of the button. Below is a detailed list of how to access information from Homebase.

- Medical Information – Click to enter & view medical histories.
- Emergency Contacts – Click to view a List Screen of people you rely on.
- About Me – Click to enter and view your general information.
- Appointments & To Do's – Click to launch the calendar and date book.
- Assets – Click on the drop-down menu to enter and view your assets. These drop down categories are pre-defined. You cannot customize them.
- Insurance – Click on the drop-down menu to enter and view your insurance. These drop down categories are pre-defined. You cannot customize them.
- Contents of Home – Click to enter and view the contents of your home.
- Journals & Notes – Click on the button to enter and view ALL Journal and Notes entries. Click on the drop-down menu to enter and view by category. You define these categories when you enter information on the Detail Screen.
- Pictures – Click on the button to enter and view ALL Picture entries. Click on the drop-down menu to enter and view by category. You define these categories when you enter information on the Detail Screen.
- Important Documents – Click on the button to enter and view ALL Pictures entries. Click on the drop-down menu to enter and view by category. You define these categories when you enter information on the Detail Screen.
- My Address Book – Click to enter and view information on family, friends, acquaintances, businesses and services.
- Urgent Dates & To Do's – Click to view a List Screen of your most important appointments and tasks.
- Debts & Loans – Click on the drop-down menu to enter and view your debts and loans. These drop down categories are pre-defined. You cannot customize them.

- Income & Expenses – Click on the drop-down menu to view a List Screen of your expenses or to enter and view your income.
- Vehicles – Click on the drop-down menu to enter and view information on your vehicle insurance, vehicle loans, vehicle ownership and vehicle repairs.
- Lists & Logs – Click on the drop-down menu to view a List Screen of birthdays and to recover accidentally deleted files with the Recover Deleted Files List Screen.
- Recipes - Click on the button to enter and view ALL Recipe entries. Click on the drop-down menu to enter and view by category. You define these categories when you enter information on the Detail Screen.
- Websites & Passwords - Click on the button to enter and view ALL Website & Password entries. Click on the drop-down menu to enter and view by category. You define these categories when you enter information on the Detail Screen.

EXIT Button – Located in the upper right corner of a list, detail or calendar screen, EXIT takes you back one screen while automatically capturing the information you've entered.

OK Button - Located in the upper right corner of a list, detail or calendar screen, OK takes you back one screen while automatically capturing the information you've entered.

Delete Button – Located in the lower right corner of detail screens, DELETE will remove that record from the list screen.

Drop-Down Menu – Click on the arrows on certain buttons on Homebase, Detail Screens, and the Calendar Screen to view category information. Certain drop-down menus are pre-loaded and will not allow you to add or alter them, such as Medical Procedures on the Medical Information Detail Screen. Other drop-down menus are user-defined, such as Type of Dish on the Recipe Detail Screen. These allow you to define the categories of the drop-down menus.

List Screen – When you click on the Medical Information, Emergency Contacts or Home and Family buttons or pull down a drop-down menu, you will see a list screen. These screens show a summary of all entries. You can sort them any way you choose by clicking on the column headers.

Detail Screen – When you click on an item entered or on the ADD Button in the upper right corner of a List Screen you will see a Detail Screen. These screens show more detailed information regarding that entry.

Transaction Screen – When you enter a deposit, withdrawal or payment, for example, you are doing so on a Transaction Screen. These screens show an even greater level of detail regarding that entry. They also contain calculating fields, so you can see exactly what you have invested, paid for, or owe on those items.

ADD Button – Located in the upper right corner of a List Screen and Calendar Screen, ADD allows you to enter a new record.

PRINT Button - Located in the upper right corner of the list and calendar screen, PRINT launches Locket's Print Manager. You must select the records you'd like to print first. Do this by checking the box located in the first column of any list screen.

Print Manager – This menu overlays the screen you are going to print. First, select the type of report you'd like using the drop-down menu on the screen. Next, click on Preview on Screen to view on your screen or click Send to Printer to produce a paper report. Cancel simply closes the Print Manager.

Calendar Screen – When you click on Appointments & To Do's you will launch Locket's calendar. The calendar is linked with your address book. To enter a new appointment, double-click on the date on the upper left corner of the calendar. Here, you may choose to tag an appointment as Urgent.

URGENT TASKS Button – Located in the upper right corner of the Calendar Screen, URGENT TASKS takes you to a List Screen of all of the appointments you tagged as urgent.

APPOINTMENTS Button - Located in the upper right corner of the Urgent Tasks List Screen, APPOINTMENTS takes you back to the monthly calendar view on the Calendar Screen.

ENTER Transaction Buttons - Located in the upper right corner of the Transaction Screens, these button allow you to enter detailed information regarding, for example, a bank deposit, withdrawal or interest earned. These buttons are located in the upper right portion of the teal information frame.

## **System Requirements Questions**

What are the minimum requirements to run Locket?

- Windows XP, 2003 or Vista
- CD-ROM Drive for installation (if you've purchased the CD version)
- 128 MB of total RAM
- 200 MB of hard disk space

Does Locket run on a Mac?

Currently, Locket does not run on a Mac. But, we are working on a version that will.

What is the best screen resolution to run Locket in?

Locket was designed to run on a screen resolution of 1024 x 768. For best results set your monitor resolution to 1024 x 768 in the control panel / monitor settings of your computer. If you are not able to view Locket at the recommended resolution, use the left and right scroll bars to move about the screen.

## **Installation & Registration Questions**

Why do I get a warning message from Microsoft when installing Locket?

The error appears because Locket has not yet certified product drivers in Microsoft's voluntary logo program. This program is not an industry standard. Locket has a rigorous quality assurance program and all of its products are tested above and beyond the requirements of any Microsoft or similar test programs. You can ignore this error without concern for your system. Simply select 'Continue Anyway' at these prompts.

How do I register Locket?

There are three ways to register Locket. If you have an internet connection, simply fill out the form that appears when you begin Locket and submit it by selecting 'Register Now.' If you do not have an internet connection, fill out the form and when you reach the question regarding how to submit your registration, select 'Phone' or 'Fax' and your registration will be sent to your printer, along with a phone or fax number.

Why do I need to register Locket each year?

In order for us to know if our customer base is continually using Locket and finding value in it, along with being able to offer you the best and most current updates, we ask that you register each year.

How will I know when Locket has upgrades and new features?

Locket will contact you.

How do I install upgrades and new features?

They will be offered on our website under Downloads & Upgrades.

## **General Help**

How do I see all of my Recipes?

Click on the Recipe button to view all of the recipes you have entered. Click on the drop down menu to view your recipe entries by category.

How do I see all of my Pictures?

Click on the Pictures button to view all of the pictures you have entered. Click on the drop down menu to view your picture entries by category.

How do I see all of my Important Documents?

Click on the Important Documents button to view all of the documents you have entered. Click on the drop down menu to view your important documents entries by category.

How do I see all of my Journals & Notes?

Click on the Journals & Notes button to view all of the journals and notes you have entered. Click on the drop down menu to view your journal and notes entries by category.

How do I exit Locket?

Click on the red X in the upper right corner of the Locket window to exit.

Can I link to the Locket website from Homebase?

Yes. Click on the Locket logo on Homebase to launch directly to the Locket website.

Where do I create the Birthday List?

When you are entering contacts in your address book, simply click on the 'Remember Birthday' box to automatically add that person to your Birthday List.

How do I enter information in Emergency Contacts?

When you are entering contacts in your address book, simply click on the 'Emergency Contact' box to automatically add that person to your Emergency Contact List.

How do I enter information in the Expense Tracker?

You don't. Expense Tracker automatically gathers information from your Debts & Loans transactions and compiles them here for easy viewing. So you can track and sort your information on one screen.

How do I know my information is being saved? When I enter it I don't see a SAVE button?

You won't. Locket automatically saves any and all information you enter in fields. You do not need to click a save button. When you exit a screen that information is automatically saved.

Can I copy my data to an external drive such as a CD or Flash Drive?

Yes. We recommend you keep a copy of your information on external drive in a safe place, away from home. Then, your information can be accessed in case of emergency or if your computer is compromised.

### **Address Book Help**

How do I enter information in my Address Book?

Click on 'Address Book' on Homebase and begin entering information. You do not need to enter information in each field. You choose how much or little information to enter. Once you've completed entering the information click on the 'EXIT' button in the upper right corner. This will take you back to Homebase.

How do I print information from my Address Book?

Select the 'PRINT' button in the upper right corner. This will launch the Print Manager and allow you to choose how you'd like to see your address book organized. You can preview it on the screen by clicking 'Preview on Screen' and then send it to your printer by clicking 'Send to Printer.'

What does the 'THEIR FILES' drop-down menu do?

This feature of Locket allows you to keep track of what your friends and family have given you. Imagine Locket is a filing drawer and it houses file folders, the largest folder being your own. It also allows you to create file folders for each of the entries in your address book. That way, you can easily access and view the information provided to you by that contact.

How do I enter information into my contacts' files?

When you enter information in either Journals & Notes, Pictures, Important Documents, Recipes or Websites and Passwords, Locket captures the information in the 'From' field on the Detail Screens and files the information accordingly.

Are there any limits to the number of contacts I can have in Locket?

No.

How do I access my contacts files?

Click on 'My Address Book' on Homebase. In the upper right corner of the teal information frame click on the drop-down menu of 'Their Files.' You will then be able to access that information.

How do I edit information in My Address Book?

Click on 'My Address Book' on Homebase and select the contact you would like to edit from the List Screen by double-clicking anywhere on that contact's row. This will launch you to the Detail Screen of that contact, then simply edit the information you choose. Those changes are automatically saved when you click on the 'EXIT' button and return to the Address Book List Screen.

How do I delete information from My Address Book?

Click on 'My Address Book' on Homebase and select the contact you would like to edit from the List Screen by double-clicking anywhere on that contact's row. This will launch you to the Detail Screen of that contact, then simply click on the 'DELETE' button in the lower right corner of the screen. Those changes are automatically saved when you click on the 'DELETE' button and return to the Address Book List Screen.

Can I recover accidentally deleted information?

Yes. From the Lists & Logs drop down-menu select 'Recover Deleted Files,' this will launch you to a List Screen. To rescue an inadvertently deleted item, click on the box under the SAVE column header and that information will be returned to its proper place.

### **Calendar Screen Help**

How do I enter the calendar?

Click on the 'Appointments and To Do's' button on Homebase.

How can I view detailed information about my daily tasks?

Double-click on the date, the number in the upper left corner of the calendar grid.

How do I tag an appointment or to do as urgent?

When you are entering a new appointment or task, check the 'Urgent' box.

Where do I go to view my Urgent Tasks?

You can view them from two places. Either directly from Homebase by clicking on the 'Urgent Dates & To Dos' button or from inside your address book by clicking on the 'URGENT DATES' button in the upper right corner.

How do I switch between Calendar view and List Screen view?

When you are in the calendar click on the 'URGENT DATES' button in the upper right corner to view a list screen and then on the 'APPOINTMENTS' button to view a calendar grid.

Can I print my daily, weekly or monthly schedule from the Calendar?

Yes. Simply select those options from the drop-down menu on the Print Manager.

How do I edit information in the Calendar?

Click on 'Appointments & To Do's' on Homebase and select the information you would like to edit by double-clicking on the date in the upper left corner. This will launch you to the Detail Screen of that date, then simply edit the information you choose. Those changes are automatically saved when you click on the 'EXIT' button and return to the Calendar.

How do I delete information from the Calendar?

Click on 'Appointments & To Do's' on Homebase and select the information you would like to edit by double-clicking on the date in the upper left corner. This will launch you to the Detail Screen of that date click on the 'DELETE' button in the lower left corner. Those changes are automatically saved when you click on the 'EXIT' button and return to the Calendar.

Can I recover accidentally deleted information?

Yes. From the Lists & Logs drop down-menu select 'Recover Deleted Files,' this will launch you to a List Screen. To rescue an inadvertently deleted item, click on the box under the SAVE column header and that information will be returned to its proper place.

### **List Screen Help**

How do I sort my information on a List Screen?

You can view and sort your information by clicking on the column headers for that screen. Information is sorted alphabetically, in either ascending or descending order.

How do I view detailed information about my entry from the List Screen?

Double-click anywhere on a row in a List Screen. This will launch you to the Detail Screen of that information.

How do I print information?

Select the items you'd like to print from the List Screen by checking the box located under the first column header. It has a printer icon as its header. Then, select the 'PRINT' button in the upper right corner. This will launch the Print Manager and allow you to choose how you'd like to see your information organized. You can preview it on the screen by clicking 'Preview on Screen' and then send it to your printer by clicking 'Send to Printer.'

How do I edit information already entered on a List Screen?

Double-click anywhere on a row in a List Screen. This will launch you to the Detail Screen of that information. Then simply edit the information you choose by swiping it and typing new information. Those changes are automatically saved when you click on the 'EXIT' button in the upper right corner and return to the List Screen.

How do I delete an item from a List Screen?

Double-click anywhere on a row in a List Screen. This will launch you to the Detail Screen of that information. Then, simply click on the 'DELETE' button in the lower right corner of the screen.

## **Detail Screen Help**

Can I print from a Detail Screen?

Currently, you can not. But, we are working on incorporating that feature into a future upgrade.

How do I edit information on a Detail Screen?

Simply edit the information you choose by swiping it and typing new information. Those changes are automatically saved when you click on the 'EXIT' button in the upper right corner and return to the List Screen.

How do I delete information from a Detail Screen?

Simply click on the 'DELETE' button in the lower right corner of the screen.

How do I import a picture?

Click on the 'GET IMAGE' button located in the center of the Detail Screen. This will then launch a menu and allow you to find and place your picture from your hard drive.

Can I import more than one picture per entry?

Currently, you can not. But, we are working on incorporating that feature into a future upgrade.

Why does my picture look distorted?

Your vertical or portrait images may be stretched to fit into the picture box in Locket. You can avoid this by cropping your pictures in a photo editing program. We are working on remedying this in our next upgrade.

Can I import a video or audio file?

Currently, you can not. But, we are working on incorporating that feature into a future upgrade.

## **Transaction Screen Help**

Why don't certain fields don't allow me to enter information?

These fields are smart fields that have drawn their information from the Detail Screen. They can be changed only from the Detail Screen.

How do I edit information on a Transaction Screen?

To change the smart fields, you must edit them from the Detail Screen. The other information can be edited by simply swiping it and typing new information. Those changes are automatically saved when you click on the 'EXIT' button in the upper right corner and return to the Detail Screen.

How do I delete information from a Transaction Screen?

Click on the 'DELETE' button in the lower right corner of the screen. You will then return to the Detail Screen.

## **Entering Information**

Can I cut and paste in Locket?

Yes, those features are available under the Edit menu along the top of the Locket Window.

Is there spell-check in Locket?

Locket uses rich text, similar to word-processing programs, that automatically corrects familiar misspellings. We are working on incorporating a complete spell-check system into a future upgrade.

Do I need to click a button to save my information?

No. Locket automatically saves any and all information you enter in fields. You do not need to click a save button. When you exit a screen that information is automatically saved.

Does Locket back-up my data?

Yes. Locket creates a back-up of your encrypted data file.

Can I import my Outlook address book?

Currently, you can not. But, we are working on incorporating that feature into a future upgrade.

Can I copy my data to an external drive such as a CD or Flash Drive?

Yes.

## **Deleting Information**

How do I delete information in Locket?

Click on the 'DELETE' button in the lower right corner of the Detail Screens. You will then return to the List Screen.

How do I recover accidentally deleted information?

Select 'Recover Deleted Files' from the Lists & Logs drop down-menu. This will launch you to a List Screen. To rescue an inadvertently deleted item, click on the box under the SAVE column header and that information will be returned to its proper place.

How often should I clear my Recover Deleted Files List Screen?

You should do this occasionally. If you do not need to recover an item you have deleted, click on the box under the DELETE column header and that information will be removed from the system.

## **Printing**

How do I print a report?

Select the items you'd like to print from the List Screen by checking the box located under the first column header. It has a printer icon as its header. Then, select the 'PRINT' button in the upper right corner. This will launch the Print Manager and allow you to choose how you'd like to see your information organized. You can preview it on the screen by clicking 'Preview on Screen' and then send it to your printer by clicking 'Send to Printer.'

Can I print mailing labels?

Yes. Select that report from the Print Manager drop-down box when printing from your Address Book.

What are my printing options?

Each screen has a variety of printing and viewing options. Use the drop-down menu in the Print Manager to select a printing and viewing option.

What type of reports can I print?

Each screen has a variety of printing and viewing options. Use the drop-down menu in the Print Manager to select a printing and viewing option.

Can I preview a report in Locket?

Yes. You can preview it on the screen by clicking 'Preview on Screen' from the Print Manager.

Where do I go to print a report?

Select the 'PRINT' button in the upper right corner of List Screens. This will launch the Print Manager and allow you to choose how you'd like to see your information organized.

## **Troubleshooting**

Why is my ADD Button missing?

Your 'ADD' button will be disabled if you have not registered Locket after a determined number of sessions. Simply register Locket and your 'ADD' Button will reappear.

Why aren't my pictures and images printing on my reports?

From the Print Manager drop-down menu select a Picture Report to view images. Locket allows you to choose to omit pictures to save on ink consumption.