

USER GUIDE

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CATEGORIES

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GENERAL

[TOP](#)

Categories are used to group related [Items](#).

Each Category can have a customized set of [Attributes](#) assigned to that Category (see "[Attributes](#)").

Categories can also be subdivided into subcategories for greater specificity in organizing related [Items](#). For example, you can subdivide an "Appliance" Category into subcategories such as "Large Appliances" and "Small Appliances".

New Categories and subcategories can be added at any time (see "[Categories – Adding Categories](#)").

Categorizr also comes with a number of Predefined Categories in order to allow you to get started right away. Predefined Categories can be edited (or deleted) depending on the user's preferences (see "[Categories – Editing Categories](#)" and "[Categories – Deleting Categories](#)").

VIEWING CATEGORIES

[TOP](#)

View all your Categories by tapping the **Categories** button in the **Main Menu Screen** and view the subcategories associated with a particular Category by tapping the plus (+) icon next to the Category name.

By tapping on a Category or subcategory you will see a list of all the [Items](#) associated with that Category or subcategory, as applicable.

Each Category displays a number beside it that represents the number of [Items](#) directly associated with that Category *plus* all the [Items](#) associated with each of the subcategories under that Category. Each subcategory displays a number beside it that represents the number of [Items](#) directly associated to that subcategory.

ADDING CATEGORIES

[TOP](#)

Add a new Category by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Add** button at the bottom of the screen to get you to the **Add Category Screen**. From there, type the Category name using the on-screen keyboard.

In the **Add Category Screen** you have the option of adding subcategories to a Category by tapping the green plus (+) icon next to the **Add Subcategory** button to get you to the **Add Subcategory Screen**. From there, type the subcategory name using the on-screen keyboard.

In the **Add Category Screen** you can also assign [Attributes](#) (see “[Attributes – Adding Attributes](#)”) to a Category.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

EDITING CATEGORIES

[TOP](#)

All Categories (and subcategories) can be edited.

Edit a Category by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the Category name you want to edit and the **Edit Category Screen** will appear. ***Do not tap the red minus (-) icon next to the Category name, as this will permanently delete that Category and all its associated subcategories and *Items*.***

In the **Edit Category Screen** you can edit the Category name using the on-screen keyboard and also edit the subcategories associated with a Category by tapping the subcategory name to get you to the **Edit Subcategory Screen**. From there, edit the subcategory name using the on-screen keyboard.

In the **Edit Category Screen** you can also edit any [Attributes](#) (see “[Attributes – Editing Attributes](#)”) associated with a Category.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

DELETING CATEGORIES

[TOP](#)

Delete a Category by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the red minus (-) icon next to the Category name you want deleted and then tap the **Delete** button that appears. ***Remember that deleting a Category will also permanently delete all its associated subcategories and *Items*.***

Delete a subcategory by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the Category name (**not** the red minus (-) icon) that contains the subcategory name that you want deleted to get you to the **Edit Category Screen**. Here you can delete the subcategory by tapping the red minus (-) icon next to the subcategory name you want deleted and then tap the **Delete** button that appears. ***Remember that deleting a subcategory will result in all Items associated with the subcategory being assigned to the parent Category.***

In the **Edit Category Screen** you can also delete any [Attributes](#) (see “[Attributes – Deleting Attributes](#)”) associated with a selected Category.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

LOCATIONS

- [General](#)
- [Viewing Locations](#)
- [Adding Locations](#)
- [Editing Locations](#)
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GENERAL

[TOP](#)

The Location function allows you to keep track of where your [Items](#) are physically located. For example, you can track which [Items](#) are in your “Home”, “Vacation Property”, “Storage Facility”, etc.

Locations can also be subdivided into sublocations for greater specificity in locating your [Items](#) within a physical location. For example, you can subdivide a “Home” Location into sublocations such as “Kitchen”, “Office”, “Family Room”, “Master Bedroom”, etc.

New Locations and sublocations can be added at any time (see “[Locations – Adding Locations](#)”).

Categorizr also comes with a number of Predefined Locations in order to allow you to get started right away. Predefined Locations can be edited (or deleted) depending on the user’s preferences (see “[Locations – Editing Locations](#)” and “[Locations – Deleting Locations](#)”).

VIEWING LOCATIONS

[TOP](#)

View all your Locations by tapping the **Locations** button in the **Main Menu Screen** and view the sublocations associated with a particular Location by tapping the plus (+) icon next to the Location name.

By tapping on a Location or sublocation you will see a list of all the [Items](#) associated with that Location or sublocation, as applicable.

Each Location displays a number beside it that represents the number of [Items](#) directly associated with that Location *plus* all the [Items](#) associated with each of the sublocations under that Location. Each sublocation displays a number beside it that represents the number of [Items](#) directly associated to that sublocation.

ADDING LOCATIONS

[TOP](#)

Add a new Location by tapping the **Locations** button in the **Main Menu Screen** and then tap the **Add** button at the bottom of the screen to get you to the **Add Location Screen**. From there, type the Location name using the on-screen keyboard.

In the **Add Location Screen** you have the option of adding sublocations to a Location by tapping the green plus (+) icon next to the **Add Sublocation** button to get you to the **Add Sublocation Screen**. From there, type the sublocation name using the on-screen keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

EDITING LOCATIONS

TOP

All Locations (and sublocations) can be edited.

Edit a Location by tapping the **Locations** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the Location name you want to edit and the **Edit Location Screen** will appear. ***Do not tap the red minus (-) icon next to the Location name, as this will permanently delete that Location and all its associated sublocations.***

In the **Edit Location Screen** you can edit the Location name using the on-screen keyboard and also edit the sublocations associated with a Location by tapping the sublocation name to get you to the **Edit Sublocation Screen**. From there, edit the sublocation name using the on-screen keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

DELETING LOCATIONS

TOP

Delete a Location by tapping the **Locations** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the red minus (-) icon next to the Location name you want deleted and then tap the **Delete** button that appears. ***Remember that deleting a Location will also permanently delete all its associated sublocations.***

Delete a sublocation by tapping the **Locations** button in the **Main Menu Screen** and then tap **Edit** button at the bottom of the screen. Tap the Location name (**not** the red minus (-) icon) that contains the sublocation name that you want deleted to get you to the **Edit Location Screen**. Here you can delete the sublocation by tapping the red minus (-) icon next to the sublocation name you want deleted and then tap the **Delete** button that appears.

Deleting a Location or sublocation will not delete the **Items** associated with that Location or sublocation but rather such **Items** will simply no longer be associated with such deleted Location or sublocation, as applicable.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

TAGS

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- [Viewing Tags](#)
- [Adding Tags](#)
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GENERAL

[TOP](#)

Tags help you categorize your [Items](#) so that you can find them more quickly. For example, you may wish to add a Digital Camera as a new [Item](#) under the [Category](#) name “Electronics and Entertainment” but also “Tag” that [Item](#) under a number of Tags such as “Travel List” and “Items Under Warranty”.

Categorizr allows you to assign an *unlimited* number of Tags to a single [Item](#).

Tags can also be subdivided into subtags for greater specificity in organizing your [Items](#). For example, you can subdivide a “Travel List” into subtags “Camping”, “Beach Vacation”, “Cruise”, “Spa Weekend”, etc.

New Tags and subtags can be added at any time (see “[Tags – Adding Tags](#)”).

Categorizr also comes with a number of Predefined Tags in order to allow you to get started right away. Predefined Tags can be edited (or deleted) depending on the user’s preferences (see “[Tags – Editing Tags](#)” and “[Tags – Deleting Tags](#)”).

VIEWING TAGS

[TOP](#)

View all your Tags by tapping the **Tags** button in the **Main Menu Screen** and view the subtags associated with a particular Tag by tapping the plus (+) icon next to the Tag name.

By tapping on a Tag or subtag you will see a list of all the [Items](#) associated with that Tag or subtag, as applicable.

Each Tag displays a number beside it that represents the number of [Items](#) directly associated with that Tag *plus* all the [Items](#) associated with each of the subtags under that Tag. Each subtag displays a number beside it that represents the number of [Items](#) directly associated with that subtag.

ADDING TAGS

[TOP](#)

Add a new Tag by tapping the **Tags** button in the **Main Menu Screen** and then tap the **Add** button at the bottom of the screen to get you to the **Add Tag Screen**. From there, type the Tag name using the on-screen keyboard.

In the **Add Tag Screen** you have the option of adding subtags to a Tag by tapping the green plus (+) icon next to the **Add Subtag** button to get you to the **Add Subtag Screen**. From there, type the subtag name using the on-screen keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

EDITING TAGS

TOP

All Tags (and subtags) can be edited.

Edit a Tag by tapping the **Tags** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the Tag name you want to edit and the **Edit Tag Screen** will appear. **Do not tap the red minus (-) icon next to the Tag name, as this will permanently delete that Tag and all its associated subtags.**

In the **Edit Tag Screen** you can edit the Tag using the on-screen keyboard and also edit the subtags associated with a Tag by tapping the subtag name to get you to the **Edit Subtag Screen**. From there, edit the subtag name using the on-screen keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

DELETING TAGS

TOP

Delete a Tag by tapping the **Tags** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the red minus (-) icon next to the Tag name you want deleted and then tap the **Delete** button that appears. **Remember that deleting a Tag will also permanently delete all its associated subtags.**

Delete a subtag by tapping the **Tags** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the Tag name (**not** the red minus (-) icon) that contains the subtag name that you want deleted to get you to the **Edit Tag Screen**. Here you can delete the subtag by tapping the red minus (-) icon next to the subtag name you want deleted and then tap the **Delete** button that appears.

Deleting a Tag or subtag will not delete the **Items** associated with that Tag or subtag but rather such **Items** will simply no longer be associated with such deleted Tag or subtag, as applicable.

Remember to tap the **Save** button after you have completed each screen in order to

save the changes made.

ATTRIBUTES

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- [Predefined Attributes](#)
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- [Editing Attributes](#)
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GENERAL

[TOP](#)

An Attribute is a piece of data you can track for an [Item](#) such as “Purchase Price” or “Serial Number”.

Categorizr allows you to create an *unlimited* number of customized Attributes that will be associated with a particular Category and specify the type of data it holds such as text, date or currency (see “[Attributes – Adding Attributes](#)”).

Categorizr comes with two Predefined Attributes for all [Items](#), namely “Purchase Price” and “Replacement Cost”, that allow you to keep track of the total purchase price you paid for your [Items](#) as well as their replacement cost (see “[Attributes – Predefined Attributes](#)”).

Categorizr also comes with a number of Predefined Attributes associated with particular Predefined Categories that allow for quick selection, including “Make”, “Model” and “Serial Number” (see “[Attributes – Predefined Attributes](#)”).

Categorizr supports the following different data (field) types (referred to as **Attribute Types** in the Categorizr App):

- Text (Single-Line): use this Attribute Type when you wish to add one line of text information to an [Item](#)
- Text (Multi-Line): use this Attribute Type when you wish to add multiple lines of text information to an [Item](#)
- Barcode: use this Attribute Type when you wish to add a barcode to an [Item](#)
- Contact: use this Attribute Type when you wish to add a contact name from your device’s address book to an [Item](#)
- Count: use this Attribute Type when you wish to enter a number count to an [Item](#)

Currency:	use this Attribute Type when you wish to add a currency type to an Item (for example, US\$100.00)
Date:	use this Attribute Type when you wish to add a date to an Item (for example, January 1, 2015)
Numbers:	use this Attribute Type when you wish to add a specific number to an Item (for example, 725, 2.15)
Email Address:	use this Attribute Type when you wish to add an email address to an Item (for example, contact@categorizr.com)
Web Address:	use this Attribute Type when you wish to add a website address to an Item (for example, www.categorizr.com)
Location:	use this Attribute Type when you wish to add a map location to an Item
Phone Number:	use this Attribute Type when you wish to add a phone number to an Item (for example, 555-555-5555)
Ratings:	use this Attribute Type when you wish to rate an Item (for example, 5 stars)

Lookups

Categorizr also allows you to use your customized [Lookups](#) as an Attribute Type. Lookups associated with a Category can be added, edited and deleted in the same way as Attribute are added (see "[Attributes – Adding Attributes](#)"), edited (see "[Attributes – Editing Attributes](#)"), and deleted (see "[Attributes – Deleting Attributes](#)")

PREDEFINED ATTRIBUTES

[TOP](#)

Categorizr comes with two Predefined Attributes for each Category, namely **Purchase Price** and **Replacement Cost**, that cannot be deleted, hidden or reordered.

When you add an [Item](#), you have the option of entering the price you paid for that [Item](#) in the **Purchase Price** field and the cost to replace that [Item](#) in the **Replacement Cost** field.

The **Total Purchase Price** and the **Total Replacement Cost** of all your [Items](#) are automatically totaled and displayed on the **Main Menu Screen** and **Category Screen**. You can also select a Category, subcategory, Location, sublocation, Tag or subtag to view the **Purchase Price Subtotal** and the **Replacement Cost Subtotal** for all your [Items](#) in that particular Category, subcategory, Location, sublocation, Tag or subtag, as applicable.

Categorizr also comes with a number of Predefined Attributes associated with particular Predefined Categories that allow for quick selection, including “Make”, “Model” and “Serial Number”. These Predefined Attributes can be edited or deleted.

ADDING ATTRIBUTES

TOP

Categorizr allows you to create an *unlimited* number of customized Attributes that will be associated with a particular Category and specify the type of data it holds such as text, date or currency.

New Attributes can be added to either newly created or an existing Category.

Adding Attribute to New Category

Add a new Attribute to a new [Category](#) by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Add** button at the bottom of the screen to get you to the **Add Category Screen**. From there, type the [Category](#) name using the on-screen keyboard (see “[Categories – Adding Categories](#)”).

In the **Add Category Screen** you can assign Attributes to a [Category](#) by tapping the green plus (+) icon next to the **Add Attribute** button to get you to the **Add Attribute Screen**. From there, type the Attribute name using the on-screen keyboard and select the appropriate Attribute Type (see “[Attributes – General](#)”).

In the **Add Attribute Screen** you can also select different types of keyboards that are best suited when adding an Attribute. For example, if you are adding a “Serial Number” Attribute you can select the Numbers/Symbols keyboard. To specify the keyboard desired simply tap “Keyboard” under “Options” and tap the desired keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

Adding Attribute to Existing (or Predefined) Category

Add a new Attribute to an existing (or predefined) [Category](#) by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the [Category](#) name that has the Attribute you want to edit and this will take you to the **Edit Category Screen**. ***Do not tap the red minus (-) icon next to the Category name, as this will permanently delete that Category and all its associated subcategories and *Items*.***

In the **Edit Category Screen** you can assign new Attributes to an existing (or predefined) Category by tapping the green plus (+) icon next to the **Add Attribute** button to get you to the **Add Attribute Screen**. From there, type the Attribute name

using the on-screen keyboard and select the appropriate Attribute Type (see [“Attributes – General”](#)).

In the **Add Attribute Screen** you can also select different types of keyboards that are best suited when adding an Attribute. For example, if you are adding a “Serial Number” Attribute you can select the Numbers/Symbols keyboard. To specify the keyboard desired simply tap “Keyboard” under “Options” and tap the desired keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

EDITING ATTRIBUTES

TOP

All Attributes, with the exception of the [Predefined Attributes](#) “Purchase Price” and Replacement Cost”, can be edited.

Edit an Attribute by tapping the **Categories** button in the **Main Menu Screen** and then tap the **Edit** button at the bottom of the screen. Tap the [Category](#) name that has the Attribute you want to edit and this will take you to the **Edit Category Screen**. ***Do not tap the red minus (-) icon next to the Category name, as this will permanently delete that Category and all its associated subcategories and [Items](#).***

In the **Edit Category Screen** tap the Attribute you want to edit to get you to the **Edit Attribute Screen**. From there, edit the Attribute name using the on-screen keyboard. In the **Edit Attribute Screen** you can also edit the Attribute Type (see [“Attributes – General”](#)).

In the **Edit Attribute Screen** you can also select different types of keyboards that are best suited when editing an Attribute. For example, if you are editing a “Serial Number” Attribute you can select the Numbers/Symbols keyboard. To specify the keyboard desired simply tap “Keyboard” under “Options” and tap the desired keyboard.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

DELETING ATTRIBUTES

TOP

Delete an Attribute by tapping the **Categories** button in the **Main Menu Screen** and then tap **Edit** button at the bottom of the screen. Tap the [Category](#) name that contains the Attribute you want to delete and this will take you to the **Edit Category Screen**. ***Do not tap the red minus (-) icon next to the Category name, as this will permanently delete that Category and all its associated subcategories and [Items](#).***

In the **Edit Category Screen** you can delete the Attribute by tapping the red minus (-) icon next to the Attribute name you want deleted and then tap the **Delete** button that appears.

*Remember that deleting an Attribute will also permanently delete all of the Attribute information associated with all of the **Items** within that specific **Category** and any associated subcategories.*

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

ITEMS

- [General](#)
- [Searching Items](#)
- [Viewing Items](#)
- [Adding Items](#)
- [Editing Items](#)
- [Deleting Items](#)

GENERAL

[TOP](#)

Categorizr allows you to keep track of all your Items.

SEARCHING ITEMS

[TOP](#)

You can locate an Item by tapping on the associated Category, subcategory, Location, sublocation, Tag or subtag where that Item is stored.

You can also locate an Item by tapping the **Search** button in the **Main Menu Screen** and searching it by name or other information related to that Item (see "[Searching](#)").

VIEWING ITEMS

[TOP](#)

Once you have found your Item (see "[Items – Searching Items](#)") you can view your Item details by tapping the Item name or its associated [Cover Flow Image](#) to view the **Item Detail Screen**.

ADDING ITEMS

[TOP](#)

QUICK Add Item

Quickly add a new Item by tapping the **QUICK Add Item** button at the top of each of the Categories List Screen, the Locations List Screen and the Tags List Screen and follow the screen prompts. It's that easy!

When adding a new Item use the on-screen keyboard to input all the information you want to have associated with that Item, including: selecting the [Location](#) (or sublocation) where the Item is physically located; associating the Item with one or more [Tags](#) (or subtags); adding a [Cover Flow Image](#) and other [Images](#) of the Item (see "[Images – Adding Images](#)"); adding any [Attachments](#) you want associated with that Item (see "[Attachments – Adding Attachments](#)"); adding pricing details; and entering additional information within the [Attribute](#) fields, if any.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

Add Item

You can add a new Item by tapping the **Categories** button in the **Main Menu Screen** and then tap the [Category](#) or subcategory where you want the Item to be added. From there, tap the **Add Item** button at the top right of the screen to open up the **Add Item Screen**.

In the **Add Item Screen** type the Item name using the on-screen keyboard and input the rest of the information you want to have associated with that Item, including: selecting the [Location](#) (or sublocation) where the Item is physically located; associating the Item with one or more [Tags](#) (or subtags); adding a [Cover Flow Image](#) and other [Images](#) of the Item (see “[Images – Adding Images](#)”); adding any [Attachments](#) you want associated with that Item (see “[Attachments – Adding Attachments](#)”); adding pricing details; and entering additional information within the [Attribute](#) fields, if any.

You can also add an Item by tapping the **Locations** button or **Tags** button in the **Main Menu Screen** and then tap the [Location](#) (sublocation) or [Tag](#) (subtag) where you want the Item to be added. Then tap the **Add Item** button at the top right of the screen to open up the **Add Item Screen** and follow the steps in the previous paragraph.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

EDITING ITEMS

TOP

All [Items](#) can be edited.

Once you have located your Item (see “[Items – Searching Items](#)”) you can edit your Item by either (a) tapping the **Edit** button at the bottom of the screen and then tapping the Item name (or Cover Photo) or (b) tapping the Item name (or Cover Photo) and then tapping the **Edit** button at the top of the screen.

Do not tap the red minus (-) icon next to the Item name, as this will permanently delete that Item and any information, [Images](#) and [Attachments](#) associated with that Item.

In the **Edit Item Screen** you can edit the Item name using the on-screen keyboard; edit which [Location](#) and [Tags](#) it is associated with; change the [Cover Flow Image](#) or add new or delete existing [Images](#) (see “[Images – Adding Images](#)”); add new or delete existing [Attachments](#) (see “[Attachments – Adding Attachments](#)”); change the

pricing details; or change any other information found in the [Attribute](#) fields, if any.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

DELETING ITEMS

[TOP](#)

Once you have located your Item (see "[Items – Searching Items](#)") you can delete your Item by tapping the **Edit** button at the bottom of the screen. Tap the red minus (-) icon next to the Item name you want to delete and then tap the **Delete** button that appears. ***Remember that deleting an Item will permanently delete that Item and any information, [Images](#) and [Attachments](#) associated with that Item.***

IMAGES

- [General](#)
- [Viewing Images](#)
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GENERAL

[TOP](#)

Categorizr allows you to attach an *unlimited* number of Images to an [Item](#) by either taking pictures using your device's built-in camera or selecting an Image from your device's photo library.

Images can be emailed, printed and copied to other apps.

VIEWING IMAGES

[TOP](#)

To view Images of an existing [Item](#) first locate the [Item](#) (see "[Items – Searching Items](#)") and then tap on the [Item](#) name to get you to the **Item Detail Screen**. In the **Item Detail Screen** you can tap any of the [Cover Flow Images](#) to view full Images of the [Item](#) in the **Full Image Screen**.

When in the **Full Image Screen** you can flip through all of the [Item's](#) Images as well as undertake a number of actions including emailing an Image to a friend or printing it to your printer.

ADDING IMAGES

[TOP](#)

You can add Images to a new or existing [Item](#).

To add Images to a new [Item](#) first follow the steps in "[Items – Adding Items](#)" and then tap on the green plus (+) icon next to the **Add Images** button that will give you the option of taking a picture using your device's built-in camera or selecting a picture from your device's photo library.

To add Images to an existing [Item](#) first locate the [Item](#) (see "[Items – Searching Items](#)") and then tap on the **Edit** button at the bottom of the screen. Tap the [Item](#) name you want to edit and the **Edit Item Screen** will appear. ***Do not tap the red minus (-) icon next to the [Item](#) name, as this will permanently delete that [Item](#) and any information, Images and [Attachments](#) associated with that [Item](#).***

In the **Edit Item Screen** you can add an Image to an [Item](#) by tapping on the green plus (+) icon next to the **Add Images** button. From there, you will have the option of

taking a picture using your device's built-in camera or selecting a picture from your device's photo library.

Remember to tap the **Save** button, as applicable, after you have completed each screen in order to save the changes made.

DELETING IMAGES

TOP

To delete an Image from an existing **Item** first locate the **Item** (see “**Items – Searching Items**”) and then tap on the **Edit** button at the bottom of the screen. Tap the **Item** name and the **Edit Item Screen** will appear. ***Do not tap the red minus (-) icon next to the **Item** name, as this will permanently delete that **Item** and any information, Images and **Attachments** associated with that **Item**.***

In the **Edit Item Screen** you can delete an Image associated with an **Item** by tapping the red minus (-) icon next to the Image name that you want to delete and then tap the **Delete** button that appears. ***Remember that deleting an Image will permanently delete that Image from that **Item**.***

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

ATTACHMENTS

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- [Deleting Attachments](#)

GENERAL

[TOP](#)

Categorizr allows you to attach an *unlimited* number of Attachments to an [Item](#) (for example, scanned receipts, user manuals and warranty information) using a number of different Attachment types (for example, PDFs, MS Word, etc.).

Attachments can be emailed, printed and copied to other apps.

VIEWING ATTACHMENTS

[TOP](#)

To view Attachments of an existing [Item](#) first locate the [Item](#) (see “[Items – Searching Items](#)”) and then tap on the [Item](#) name to get you to the **Item Detail Screen**. In the **Item Detail Screen** you can tap any of the [Item’s](#) Attachments to view full Attachments of the [Item](#) in the **Full Attachment Screen**.

When in the **Full Attachment Screen** you can undertake a number of actions including emailing an Attachment to a friend or printing it to your printer.

ADDING ATTACHMENTS

[TOP](#)

You can add Attachments to a new or existing [Item](#).

To add Attachments to a new [Item](#) first follow the steps in “[Items – Adding Items](#)” and then tap on the green plus (+) icon next to the **Add Attachments** button that will give you the option of taking a picture using your device’s built-in camera, selecting a picture from your device’s photo library or downloading a document from your Dropbox or Google Drive account.

To add Attachments to an existing [Item](#) first locate the [Item](#) (see “[Items – Searching Items](#)”) and then tap on the **Edit** button at the bottom of the screen. Tap the [Item](#) name you want to edit and the **Edit Item Screen** will appear. ***Do not tap the red minus (-) icon next to the [Item](#) name, as this will permanently delete that [Item](#) and any information, [Images](#) and Attachments associated with that [Item](#).***

In the **Edit Item Screen** you can add an Attachment to an [Item](#) by tapping on the green plus (+) icon next to the **Add Attachments** button. That will give you the

option of taking a picture using your device's built-in camera, selecting a picture from your device's photo library or downloading a document from your Dropbox or Google Drive account.

Remember to tap the **Save** button, as applicable, after you have completed each screen in order to save the changes made.

DELETING ATTACHMENTS

TOP

To delete an Attachment from an existing **Item** first locate the **Item** (see “[Items – Searching Items](#)”) and then tap on the **Edit** button at the bottom of the screen. Tap the **Item** name you want to edit and the **Edit Item Screen** will appear. ***Do not tap the red minus (-) icon next to the **Item** name, as this will permanently delete that **Item** and any information, **Images** and Attachments associated with that **Item**.***

In the **Edit Item Screen** you can delete an Attachment to an **Item** by tapping the red minus (-) icon next to the Attachment name that you want to delete and then tap the **Delete** button that appears. ***Remember that deleting an Attachment will permanently delete that Attachment from that **Item**.***

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

SEARCHING

There are two types of **Search** functions within Categorizr, the **Main Search** function and the **Item List Search** function.

Main Search

The **Main Search** function allows you to search all **Items** in Categorizr.

To search for an **Item** tap the **Main Search** button in the **Main Menu** and type the **Item** name you are searching for in the **Main Search** field and Categorizr will display all the **Items** matching your search in the **Main Search Results Screen**.

You can expand (or narrow) your Search by selecting the **Attribute Types** you wish to search by tapping (or untapping) the **Attribute Types** in the **Search In** button at the top of the screen.

Item List Search

The **Item List Search** function allows you to search the **Items** names in the current **Item List Screen**.

To search for an **Item** name type the name you are searching for in the **Item List Search** field at the top of the screen and Categorizr will display all the **Items** matching your search in the **Item List Search Results Screen**.

SORTING

The **Sort** function allows you to view [Items](#) that match specific criteria.

The **Sort** function can be applied when viewing a list of [Items](#) in a particular Category, subcategory, Location, sublocation, Tag or subtag.

When in the **Item List Screen** simply tap the **Sort** button at the bottom of the screen and select the [Attribute](#) you want to Sort.

SETTINGS

- [General](#)
- [Notification Time](#)
- [Auto Correction](#)
- [Sort Categories Alphabetically](#)
- [Sort Locations Alphabetically](#)
- [Sort Tags Alphabetically](#)
- [Cover Flow](#)
- [Lookups](#)
- [Backing Up and Restoring](#)

GENERAL

[TOP](#)

The **Settings** button in the **Main Menu Screen** allows you to access the **Settings Screen** where you can tailor the overall functionality of the Categorizr App to suit your needs.

NOTIFICATION TIME

[TOP](#)

The “Notification Time” feature allows you to select how long the notification banner is displayed at the top of the screen after you add, edit or delete a [Category](#), [Location](#), [Tag](#) or [Item](#). You can select between 1 and 5 seconds.

AUTO CORRECTION

[TOP](#)

The “Auto Correction” feature corrects typos and misspelled words if the word is similar to a word in the main spell checker dictionary. If this feature is enabled then all typos and misspelled information entered in Categorizr will be automatically corrected. If this feature is disabled then typos and misspelled information will not be automatically corrected.

SORT CATEGORIES ALPHABETICALLY

[TOP](#)

The “Sort Categories Alphabetically” feature affects the order of the **Category List Screen**. If this feature is enabled then the Categories are sorted alphabetically. If this feature is disabled then the Categories are sorted in the order that they were originally added as new Categories.

SORT LOCATIONS ALPHABETICALLY

[TOP](#)

The “Sort Locations Alphabetically” feature affects the order of the **Location List Screen**. If this feature is enabled then the Locations are sorted alphabetically. If this feature is disabled then the Locations are sorted in the order that they were originally added as new Locations.

SORT TAGS ALPHABETICALLY

[TOP](#)

The “Sort Tags Alphabetically” feature affects the order of the **Tag List Screen**. If this feature is enabled then the Tags are sorted alphabetically. If this feature is disabled then the Tags are sorted in the order that they were originally added as new Tags.

COVER FLOW

[TOP](#)

The “Cover Flow” feature allows you to view the **Cover Photo** for an [Item](#) in a **Cover Flow View** when in the **Item List Screen**. If this feature is enabled then the Cover Flow will be visible in the **Item List Screen**. If this feature is disabled then the Cover Flow will not be visible in the **Item List Screen**.

LOOKUPS

[TOP](#)

See “[Lookups](#)”.

LOOKUPS

- [General](#)
- [Viewing Lookups](#)
- [Adding Lookups](#)
- [Editing Lookups](#)
- [Deleting Lookups](#)

GENERAL

[TOP](#)

Categorizr allows you to create **Lookups**, which are customizable [Attributes](#) that allow you to assign a fixed set of values to a particular [Attribute](#). For example, you may have a collection of books from a set of authors that will require you to manually type in the author's name for each book you add to Categorizr. With the **Lookup** feature, you can create a custom "**Author Lookup**" that will allow you to simply select the Author name from a drop-down list of author names.

VIEWING LOOKUPS

[TOP](#)

View all your Lookups by tapping the **Settings** button in the **Main Menu Screen** and then tap the **Lookups** button.

ADDING LOOKUPS

[TOP](#)

Add Lookup to the Categorizr App

Add a new Lookup to the Categorizr App by tapping the **Settings** button in the **Main Menu Screen** and then tap the **Lookups** button to get you to the **Lookups List Screen** where you can see the current list of **Lookups**. From there, tap the **Add** button at the top of the screen to open up the **Add Lookup Screen**. Type the **Lookup Name** using the on-screen keyboard and enter the **Lookup Values** in the **Lookup Value** field, tapping the green plus (+) icon to add additional **Lookup Values**.

Remember to tap the **Save** button after you have completed each screen in order to save the information entered.

Add Lookup to a Category

To add a Lookup to a [Category](#) follow the same steps as adding an [Attribute](#) (see "[Attributes – Adding Attributes](#)").

EDITING LOOKUPS

[TOP](#)

All **Lookups** can be edited.

Edit a Lookup by tapping the **Settings** button in the **Main Menu Screen** and then tap the **Lookups** button to get you to the **Lookups Screen** where you can see the current list of **Lookups**. From there, tap the **Lookup Name** you want to edit and the **Edit Lookup Screen** will appear which will allow you to edit the **Lookup Name** using the on-screen keyboard.

Do not tap the red minus (-) icon next to the Lookup name, as this will permanently delete that Lookup.

Remember to tap the **Save** button after you have completed each screen in order to save the changes made.

DELETING LOOKUPS

[TOP](#)

Delete a **Lookup** by tapping the **Settings** button in the **Main Menu Screen** and then tap the **Lookups** button to get you to the **Lookups List Screen**, where you can see the current list of **Lookups**. Tap the red minus (-) icon next to the **Lookup Name** you want deleted and then tap the **Delete** button that appears.

Remember that deleting a Lookup name will permanently delete that Lookup.

NOTE: If you delete a Lookup that is associated with a Category, then any current Item within that Category will maintain reference to any prior selected Lookup Value and can be changed in the future using the on-screen keyboard.

REPORTS

- [General](#)
- [Summary Reports](#)
- [Detailed Reports](#)
- [Sharing, Saving and Printing Reports](#)

GENERAL

[TOP](#)

The **Report** function allows you to generate (in PDF format) both [Summary Reports](#) and [Detailed Reports](#) of the [Items](#) you saved in the Categorizr App.

SUMMARY REPORTS

[TOP](#)

A **Summary Report** can be prepared for one or more [Categories](#), [Locations](#) or [Tags](#).

A **Summary Report** sets out the **Item Name**, the **Purchase Price**, the **Replacement Cost**, as well as, the **Total Purchase Price** and **Total Replacement Cost**, for the selected [Categories](#), [Locations](#) or [Tags](#), as applicable.

To create a **Summary Report** tap the **Main Menu Screen** and then tap [Categories](#), [Locations](#) or [Tags](#), as applicable, then tap the **Report** button at the bottom of the screen and tap the **Summary** button. In the pop-up screen select which [Categories](#), [Locations](#) or [Tags](#), as applicable, you would like a report for and then tap the **Generate** button at the top of the screen. A **Summary Report** will quickly appear for you to Share, Save or Print (see "[Reports – Sharing, Saving and Printing Reports](#)" below).

You can also generate a **Summary Report** from the **Item View List Screen** by tapping the **Report** button at the bottom of the screen and then tapping the **Summary** button. A **Summary Report** of the [Items](#) in the **Item View List Screen** will quickly appear for you to Share, Save or Print (see "[Reports – Sharing, Saving and Printing Reports](#)" below).

DETAILED REPORTS

[TOP](#)

A **Detailed Report** can be prepared for one or more [Categories](#), [Locations](#) or [Tags](#).

A **Detailed Report** sets out **ALL** the information saved within the Categorizr App for the selected [Categories](#), [Locations](#) or [Tags](#), as applicable.

To create a **Detailed Report** tap the **Main Menu Screen** and then tap [Categories](#), [Locations](#) or [Tags](#), as applicable, then tap the **Report** button at the bottom of the screen and tap the **Detailed** button. In the pop-up screen select which [Categories](#), [Locations](#) or [Tags](#), as applicable, you would like a report for and then tap the **Generate** button at the top of the screen. A **Detailed Report** will quickly appear for you to (see “[Reports – Sharing, Saving and Printing Reports](#)” below).

You can also generate a **Detailed Report** from the **Item View List Screen** by tapping the **Report** button at the bottom of the screen and then tapping the **Detailed** button. A **Detailed Report** of the [Items](#) in the **Item View List Screen** will quickly appear for you to Share, Save or Print (see “[Reports – Sharing, Saving and Printing Reports](#)” below).

SHARING, SAVING AND PRINTING REPORTS

[TOP](#)

After you have generated a **Summary Report** or **Detailed Report** you can use the **Share** button at the top of the **Report** to **Share**, **Save** or **Print** your **Report** by using AirDrop or emailing a copy.

SHARING DATABASES

- [General](#)
- [iTunes](#)
- [AirDrop](#)

GENERAL

With the Categorizr App, there are two quick and easy ways to share your inventory database with other iOS devices, namely using iTunes or AirDrop.

iTunes

You can copy your inventory database to a new iOS device or update your inventory database on an existing iOS device by using iTunes. To do this, you will need to (1) backup your current database in iTunes (See [“Backing Up and Restoring – Backing Up Your Data – Option 1”](#)) and (2) have a current version of the Categorizr App installed on your new iOS device. Once you’ve done this, follow these steps:

Step 1: Open iTunes and connect your **current device** to your computer.

Step 2: If a message asks for a device passcode or to Trust This Computer, follow the onscreen steps.

Step 3: Select your iPhone or iPad when it appears in iTunes.

Step 4: Click “Apps” on the left side panel and scroll down the right side of the screen until to see the “File Sharing” section.

Step 5: Locate the Categorizr App and tap it. You will now see all the data files associated with the Categorizr App.

Step 6: Select all of the Categorizr App files and click “Save to...” and then find the folder on your computer to which you want to copy the files and click Save To.

Step 7: Connect Open iTunes and connect your **new device** to your computer.

Step 8: If a message asks for a device passcode or to Trust This Computer, follow the onscreen steps.

Step 9: Select your iPhone or iPad when it appears in iTunes.

Step 10: Click “Apps” on the left side panel and scroll down the right side of the screen until to see the “File Sharing” section.

Step 11: Locate the Categorizr App and tap it.

Step 12: Tap the “Add” button and locate the Categorizr database files on your computer that you want to download to the Categorizr App and tap “Add”.

Step 13: Tap “Done”.

Your inventory database is now on your new iOS device and viewable in the Categorizr App.

AirDrop

You can share your Categorizr inventory database with another iOS device by using AirDrop. To do this, you will need to have a current version of the Categorizr App installed on receiving iOS device. Once you’ve done this, follow these steps:

Step 1: Turn on AirDrop on your iOS device by swiping up from the bottom of your screen to open the Control Center.

Step 2: Tap AirDrop and choose the “Everyone” option so that all nearby iOS devices using AirDrop can see your device.

Step 3: Open the Categorizr App on your current iOS device and tap the **Main Menu** button, and then the **Settings** button.

Step 4: Tap “**Export Data**” at the bottom of the screen so that the Categorizr App creates a backup file - it may take a few minutes depending on how much information needs to be backed up.

Step 5: A **Share Screen** will open up and you should see other iOS devices you can share your Categorizr data with by using AirDrop.

Step 6: Tap the receiving (new) iOS device and a screen will come up that says it is “Receiving item from iPad/iPhone”. After the screen closes the Categorizr database has now been saved to your new iOS device.

Your inventory database is now on your new iOS device and viewable in the Categorizr App.

BACKING UP AND RESTORING

- [Backing Up Your Data](#)
- [Restoring Your Data](#)

BACKING UP YOUR DATA

[TOP](#)

Just like you do with your computer, backing up your Categorizr data is important due to potential hardware and software failures.

It is highly recommended that you backup your data using iTunes or AirDrop on a regular basis.

It is also recommended that you backup your data using iTunes or AirDrop prior to making any significant changes to your data in the event any data is lost, corrupted or accidentally deleted.

NOTE: If you delete the Categorizr App from your iOS device without backing up your data using Option 1 or Option 2 below, you then also delete the Categorizr database from your device and on any iTunes (or iCloud) backup. To avoid losing your Categorizr database, copy the files to your computer before deleting the Categorizr App from your iOS device by following Option 1 or Option 2 below.

OPTION 1: Backing up your data using iTunes (File Sharing)

When iTunes (or iCloud) backs up your device, it automatically backs up your shared files as well. However to make sure you also have a copy of your Categorizr data safely stored on your computer please follow the below steps:

Step 1: Open iTunes and connect your device to your computer.

Step 2: If a message asks for a device passcode or to Trust This Computer, follow the onscreen steps.

Step 3: Select your iPhone or iPad when it appears in iTunes.

Step 4: Click "Apps" on the left side panel and scroll down the right side of the screen until to see the "File Sharing" section.

Step 5: Locate the Categorizr App and tap it. You will now see all the data files associated with the Categorizr App.

Step 6: Select all of the Categorizr App files and click “Save to...” and then find the folder on your computer to which you want to copy the files and click Save To.

After you backup your Categorizr data on iTunes you can restore your data on your current device as well as upload your data to any other iOS device where you have installed the Categorizr App (see “[Backing Up and Restoring – Restoring Your Data](#)”).

NOTE: *If you delete the Categorizr App from your iOS device without backing up your data using Steps 1 to 6 above, you then also delete those shared files from your device and your iTunes (or iCloud) backup. To avoid losing shared files, copy the files to your computer before deleting the Categorizr App from your iOS device by following Steps 1 to 6 above.*

OPTION 2: Backing up on iMac using AirDrop

To backup your Categorizr database on your iMac using AirDrop please follow the below steps:

Step 1: Turn on AirDrop on your iOS device by swiping up from the bottom of your screen to open the Control Center.

Step 2: Tap AirDrop and choose the “Everyone” option so that all nearby iOS devices using AirDrop can see your device.

Step 3: Open the Categorizr App and tap the **Main Menu** button, and then the **Settings** button.

Step 4: Tap “**Export Data**” at the bottom of the screen so that the Categorizr App creates a backup file - it may take a few minutes depending on how much information needs to be backed up.

Step 5: A **Share Screen** will open up and you should see your iMac so that you can share your Categorizr data by using AirDrop.

Step 6: Tap your iMac and on your iMac you will see a screen come up that says it is “Receiving item from iPad/iPhone”. After the screen closes the Categorizr database has now been saved to your iMac in the “Download” folder.

If you downloaded your data to an iMac you can find the downloaded file by selecting the “Finder” icon and tapping the “Download” folder. The Categorizr database will be date and time stamped and look something like:

“Categorizr_07_27_2016_19_53.categorizrbackup”

After you backup your Categorizr data on your iMac you can restore your data on your current device as well as upload your data to any other iOS device where you have installed the Categorizr App (see "[Backing Up and Restoring – Restoring Your Data](#)").

RESTORING YOUR DATA

[TOP](#)

After you back-up your Categorizr data you can use AirDrop or iTunes to restore your data on your current device or any device that has the Categorizr App.

OPTION 1: Restoring your data using iTunes (File Sharing)

Step 1: Open iTunes and connect your device to your computer.

Step 2: If a message asks for a device passcode or to Trust This Computer, follow the onscreen steps.

Step 3: Select your iPhone or iPad when it appears in iTunes.

Step 4: Click "Apps" on the left side panel and scroll down the right side of the screen until to see the "File Sharing" section.

Step 5: Locate the Categorizr App and tap it.

Step 5: Tap the "Add" button and locate the Categorizr database files on your computer that you want to download to the Categorizr App and tap "Add".

Step 6: Tap "Done".

NOTE that restoring your Categorizr App data will result in the current Categorizr App information (including all [Categories](#), [Locations](#), [Tags](#), [Items](#), [images](#) and [documents](#)) on your device being permanently overwritten.

OPTION 2: Restoring your data using AirDrop from your iMac

Step 1: Turn on AirDrop on your iOS device by swiping up from the bottom of your screen to open the Control Center.

Step 2: Tap AirDrop and choose the "Everyone" option so that all nearby iOS devices using AirDrop can see your device.

Step 3: On your iMac, open the "Finder" application and tap the "Download" file (where you originally backed-up your Categorizr database). The Categorizr database will be date and time stamped and look something like:

"Categorizr_07_27_2016_19_53.categorizrbackup".

Step 4: Once you find the Categorizr file, double tap the file and tap the “Share” button and then tap the “AirDrop” button. You should see an icon of your iOS Device which you can restore to.

Step 5: Tap the iOS device and your iOS device will have a screen that says AirDrop is sharing the file you are restoring.

Step 6: Once your iOS device has the downloaded file a new screen will open that asks AirDrop to “Open with...” – tap “Categorizr”.

Step 7: A new pop-up screen will open and ask whether you want to Restore the Database. Tap “Restore” but ***NOTE that restoring your Categorizr App data will result in the current Categorizr App information (including all **Categories**, **Locations**, **Tags**, **Items**, images and documents) on this device being permanently overwritten by the backed up database.***