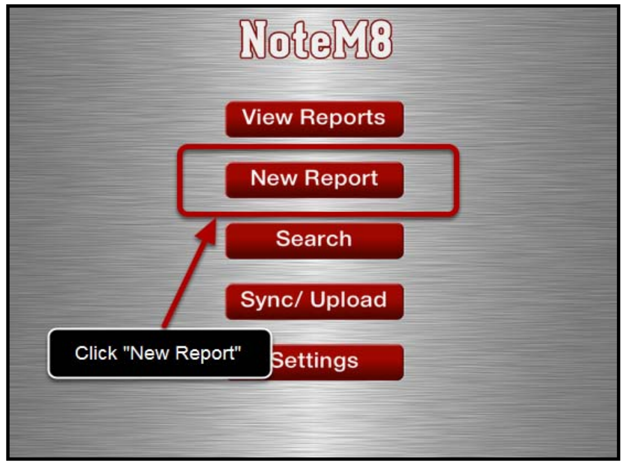
How do I create a new Note (*report, contact, interview*)?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

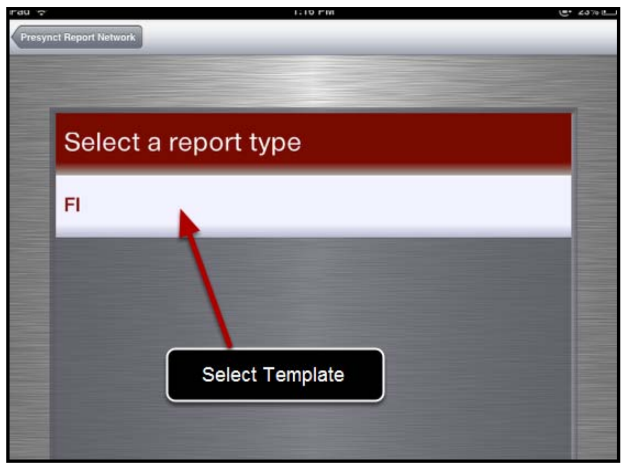
Select ***New Report*** on the Home screen.



Select ***Report Type*** template
(FI, Contact, Interview, etc.)

You can have more than one template depending on your configuration (Individual or Agency).

To upgrade to Agency configuration, contact sales@presynct.com or call 866-773-7962.



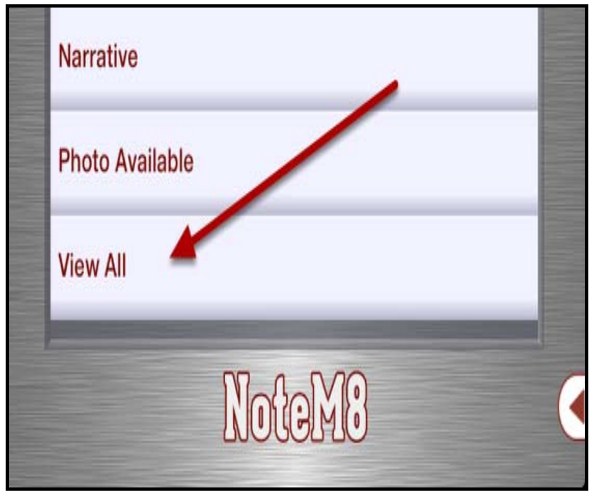
How do I enter information?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Click in the ***text box*** where you want to enter information.

Select a ***Report Section*** to reveal the text boxes where you enter information.

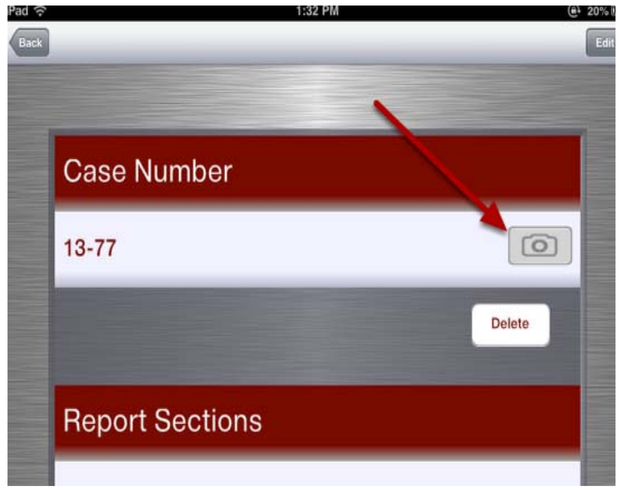
Enter your information into the applicable Text Boxes of the Report Section.

Scroll down to the bottom of the screen and select ***View All*** to reveal all of the text boxes in a Report Section at the same time.	
To return to the Report Section, press **<BACK** in the upper left corner of your screen.	

How do I add and manage Media?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Click on the ***Add Media*** icon (camera) on the right.



Select the ***Media Type*** you want to add to your Report – camera, gallery of pictures, movie, or audio.

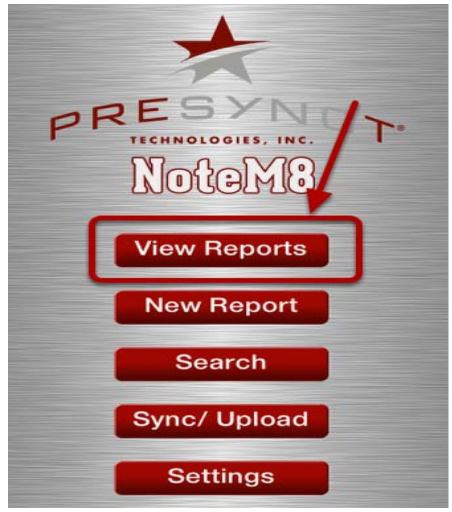
Tap on the Image to **Enlarge** it.

Hold your finger on the image to **Delete** it.

How do I view and manage my Notes?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Select ***View Reports*** on the Home screen.



Local Reports – Unsynchronized is all your reports stored locally on your device.

Local Reports – Synchronized (optional) are reports stored on the server as well as the device. They can be accessed and converted to PDF for easy viewing.

Server synchronizing is an optional feature available with an upgrade to **Presynct On Demand**.

PDF Reports are locally stored PDF copies of your reports for easy access and viewing.

For information on optional features and/or upgrading, contact sales@presynct.com or call 866-773-7962.

How do I upload (sync) local reports to the Server?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

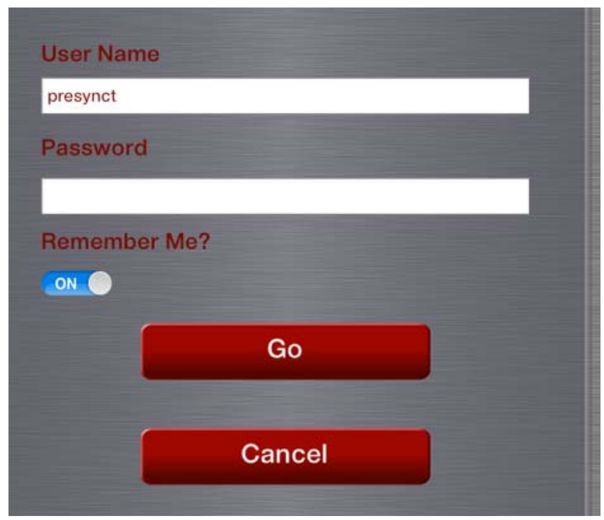
Select ***Sync / Upload*** on the Home Screen.

To upload your local Reports to the server, you must enter a ***User Name*** and ***Password***.

Click On/Off if you want NoteM8 to ***Remember*** your log in.

Press ***Go.***

To obtain a Username and Password, contact your System Administrator or email mgmt@presynct.com



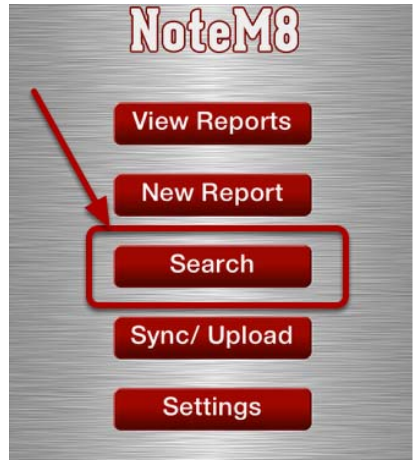
Tap on the reports you want to send ***(Sync)*** to the server

Select ***Upload***

How do I Search for Reports?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Select Search on the Home screen.



Choose a **Search Criteria** (person, vehicle, location, case number)

Enter the ***Search Criteria*** in the text box boxes.

To drill down into the *Local Reports* search results, tap the record.

Toggle the ***On/Off*** button to search the server (optional). *Local is the default value. You can search a server-side database of other users' reports (optional).*	
To drill down into the *On-Line Reports* search results, tap the record. A PDF copy of the report will be downloaded to your device.	

How do I change my settings?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Select ***Settings*** on the Home Screen.

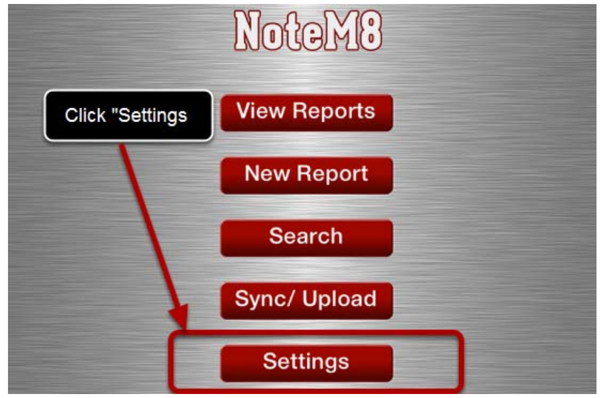
The ***Server URL*** is a default setting. Agency configurations have a custom URL dedicated to the agency.

Retention Time is how long the local device stores the records. There is no limit.

How do I load and synchronize templates from the server?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Select ***Settings*** on the Home screen.



Select ***Synchronize***. New and/or revised templates will automatically download to the local device.

This is also where you can ***Change your PIN***.

For additional information on synchronizing templates from the server, contact your System Administrator or email mgmt@presynct.com