VIPorbit®

QuickStart Guide

VIPorbit Software Int'l, Inc.

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VIPorbit® Software International, Inc.

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Introduction to VIPorbit®

VIPorbit® is a Mobile Relationship Management (MRM) solution that can be with you 24/7. That means that your contacts and all of their information can always be with you too, never out of reach.

Mike Muhney, CEO & Founder of VIPorbit® says, "For the first time, millions of iPhone users will have access to a powerful yet easy to use solution that helps them manage and build relationships. We're delivering an unprecedented level of functionality on an anytime/anywhere platform at an incredible value. It is the first desktop-like Contact Manager designed specifically for the mobile iPhone user without any requirement to be connected to the cloud."

YOUR FIRST TAP

After downloading VIPorbit® from the Apple App store, you'll see a new icon on your screen.

Since VIPorbit® will likely become one of your mission critical apps, why not put the icon on the dock?
- Tap and hold the VIPorbit® icon until the icons jiggle.
- To make some space on the dock, tap and hold one of the icons and drag it elsewhere on the screen.
- Drag the VIPorbit® icon onto the dock.
- Press the Home key on your iPhone to stop the jiggling.

Tap the VIPorbit® icon, , and let's begin.

As part of the registration process your iPhone Calendar events are automatically imported. You are also given the opportunity to import your iPhone contact list. If you choose Maybe Later, you still have the option from More > Reports, Import & Export > Import within the app to import at any time.

TIP - *When starting the app for the first time, VIPorbit requires that you choose your country. VIPorbit will use this information to apply localized settings for your region of residence. This field is also used when entering country field information in your contact records in the event this field is empty if the record is imported.*

TIP - *The information you enter about yourself on the Registration screen is used as the Owner Info in the app. The email address is used when emailing reports that are discussed later in the guide.*

TIP - *Many people will have multiple records for the same person. I.e. Jon Home, John Work, John Mobile, etc. Go to your Address book application on your Mac or PC and merge these records before importing.*

TIP - *If you have multiple calendars sync'ing to iCal, you may see duplicate activities on the VIPorbit calendar. To resolve this, change the calendar sync settings under the Info menu in iTunes while your iPhone is connected to your computer or in your iCloud settings.*

Using VIPorbit®

VIPorbit® has five icons that represent the different areas of the app. You will quickly see how all areas are integrated, allowing you to create a holistic view of each of your relationships.

Dashboard

Provides a summary of today's activities, how many contacts you have and in how many different orbits. You can navigate to your contact or activity list from the Dashboard by just tapping. You will also see the reminder to Backup My Stuff.

Contacts

This is the heart of your information. Your contacts, orbits, phone numbers, addresses, historical log and customizable fields and more.

Calendar

Today, List, Day, Month and Custom (Date Range) views in both graphical and list formats.

Find

Search for one or many contacts using simple or complex search criteria.

More

Customize your app, change calendar settings, run reports and much more.

The next section walks you through the individual areas of the app in more detail.

Dashboard

As previously mentioned, you can navigate to your Calls, Meetings and ToDo's lists for today with a single tap. Also added in version 2.0 is the Today button which takes you straight to all of your activities for that day.

Navigate to your entire contact list from the Contacts or Orbits count indicator.

BACKUP

Backup My Stuff is an additional service that backs up VIPorbit® data in a secure environment to Amazon secure servers. If you have not subscribed, you will be given the opportunity to do so when you tap the Backup button. Backup My Stuff can be invaluable in that it allows you to backup your entire database anytime and anywhere you are in a Wi-Fi zone. If you are like many mobile people who don't sit at their computers and can't tether to iTunes to backup or wait for your iCloud backup, this is perfect for you. Not only is it peace of mind, but it keeps the last 10 backups you've done, as opposed to just one like iTunes.

When you have backed up your data, the Dashboard will show the date and time of your last successful backup. You can Restore at any time after you have made at least one successful backup. You have access to your additional successful backups from More > Backup My Stuff.

For more details, visit http://www.viporbit.com/features

TIP *- The username and password, which you entered during registration, is used for securing your backup data.*

THE "I"

Tap on the "i" and the info screen appears. It's from here that you can send a query to Customer Support or follow VIPorbit® on Twitter, Facebook, LinkedIn or see their YouTube channel for helpful tutorials and user testimonials. You can even send a mention to your friends and colleagues via the "Tell a Friend".

If the "i" is jiggling, it means there is a message for you. Tap the 'i' to view it.

More

You can dive right in and start using VIPorbit® without any customization. However, to get the most out of the app we recommend that you take a little time to personalize your copy to work the way you work. To do this we'll explore the More area first rather than last. Tap More on the tab bar and to see the following options.

REPORTS, IMPORT & EXPORT

Reports & Export
Reports are generated and sent as a file attachment to the email address in your Owner Info.

The data that is included in the report is determined by the report you select. You can run a report for All Contacts, the contacts within a specific Orbit, the Most Recent Find results or an Ad Hoc List. The Most Recent Find results and Ad Hoc lists are determined by actions you take in Find.

The Report contents are as follows:

Orbit List
A simple list of all Orbits. This report does not list the contacts within the Orbits.

Contact Detail
First Name Last Name
Company Name
Title
Phone Numbers
Email Addresses
Website
Address line 1
Address line 2
City, State/Province ZIP
Country
Sec Address Line 1
Sec Address Line 2
City, State/Province ZIP
Country
User fields 1 – 6
Log – 10 most recent entries

Simple List
First Name Last Name
City
Phone Numbers (all, with type)
Email Addresses (all, with type)

Completed Activities (added in version 2.0)
First Name Last Name
Log Date
Outcome
Note

Custom Export
Allows the user to tag the fields to be exported.

Import
This feature is used to import contacts and associated notes from the address book on your iPhone. If you have created Groups in your iPhone address book VIPorbit will import those groups and automatically create Orbits for you. Tap the option and the import happens automatically. The import will not duplicate contacts by importing them more than once.

If you chose to import any groups you have created for your address book as well as your contacts during the registration process, you will only need to use this option if you add more contacts to your address book after the initial import.

TIP - If an import results in duplicate contacts in VIPorbit®, you have probably sync'd contacts from multiple sources to your iPhone address book and the system is seeing these as unique records.

TIP – If you use MS Outlook, Google or any number of CRM/contact management applications, synchronize these contacts to your iPhone address book and use More > Reports, Import & Export to import newly added contacts to VIPorbit®.

TIP - If you have deleted a contact record from your VIPorbit® and not from your iOS Address Book app, VIPorbit® will reimport this record. You will loose any logs and changes you made to the record in VIPorbit®. If you want to get rid of the record all together, delete it from your iOS Address Book as well.

TIP - Someone may send you contact information through a "vcf" file, which you can import into your address book. After doing this, use Import to get this contact information into VIPorbit®.

TIP - If you want to add pictures of your contacts that come from LinkedIn, download and sync the LinkedIn contact records with your iOS address book before doing an import.

CALENDAR PREFERENCES
iPhone Calendar

VIPorbit® looks at the iPhone Calendar every time the app is brought to the foreground, whether from background mode or from a complete close. You have the option to turn iPhone Calendar Sync ON or OFF from More > Calendar Preferences.

TIP – Because an activity imported from the iPhone calendar is not attached to a VIPorbit® contact, it will not create a log entry. Activities that you schedule from within VIPorbit® are logged.

TIP – Activities from your iOS Calendar are visible in your VIPorbit® calendar, but not vice versa. Because activities are linked to contacts in VIPorbit®, you will find it easier to schedule in VIPorbit®.

TIP – Activities that you are "invited to" by others, will appear in your VIPorbit® calendar as read-only. Nothing will slip through the cracks.

Activity Rollover

At midnight every night, Activity Rollover will move uncompleted activities from the previous day to the current day. This is set individually for Calls, Meetings, and ToDo's from More > Calendar Preferences. Activities will default to all-day activities when they are rolled over unless you reschedule them for a specific time.

User Defined Fields

User Defined Fields are on the second Contact Detail Screen of every contact. VIPorbit allows you to customize by changing the field names and defining the field type.

While most of the field types are self-explanatory, there is one type that deserves special attention. That is the field type Picklist. When you define a field type as Picklist, you can create a pre-populated list of the most often used values for the field. Now when you edit the field, you can instantly populate it by tapping one or more of the selections in the Picklist.
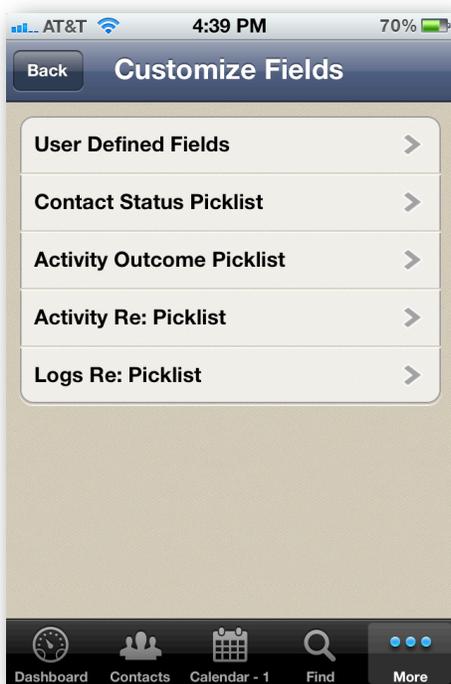
TIP – *Think your User Defined fields through for a bit. You don't want to use a field for a while and then change it all. You can, but you'll probably want to change the information that you already entered into the fields with your contacts to the new field content. Get some idea's from the VIPorbit® Facebook pages, where people can add their idea's for others or conversely post on the VIPorbit® Facebook page how you yourself customized the User Fields and any associated Picklists.*

Contact Status Picklist

On the first Contact Detail Screen the field Status can be filled either manually, or by using a Picklist item. It is in this section that you can define exactly what items you want in the Status Picklist.

TIP *– Here are some ideas for a Picklist for the Status field: Influencer, Client, Prospect, Customer, Suspect, Industry acquaintance, Friend, Friend of Friend, Investor, Family, Restaurants, Neighborhood.*

TIP *– When adding values to a field using a Picklist, the order in which you select the values is the order they will appear in the field. For example, if from the Status picklist you first select Friend and then Influencer, the field is filled with "Friend, Influencer". You can use picklist values along with Enter Manual and all items will appear when you hit Save. Use Enter Manual when you want to add a value that you don't use often enough to warrant adding another picklist value.*

Activity Outcome Picklist

When you schedule an activity in VIPorbit®, a big advantage is that the Outcome and Re: (regarding) are recorded as a Log entry. This enables you to automatically keep an up-to-date, historical perspective of the relationship. An entry for an Outcome for a Call is most likely different from an Outcome for a Meeting or ToDo. To accommodate the differences, you can uniquely define Outcome and Re: for Calls, Meetings, or ToDo's. These are meant to be brief descriptions. For more detail you can select Note beneath the Outcome field and enter as much extra description as you wish for later recall.

Activity Re: (Regarding) Picklist

The Re: Picklist functions the same as the Outcome field in an activity or manual Log entry.

Now, with this understanding, if you want to reorder the picklist items, tap Reorder in the upper right of the screen then tap and hold the ☰ icon and drag it up or down to reposition. Tap "Done" when you're finished.

TIP – *You don't necessarily need to fill all the Picklists right away. Once you have decided which field should be defined as what, populating the Picklist can be done while you use the product. You will notice that you'll customize it to your liking a lot better as you use the product more.*

Manage Orbit list

This is one of two places in the app where you can create and/or reorder your Orbits.

Use Orbits to organize and categorize your contacts. For example, you might create Orbits for Family, Friends, Business Colleagues, Football Club, Customers, Country Club, Network Group, etc. A contact can be in multiple Orbits, helping you to better and more quickly access and remember all contacts associated with any particular structure that you can think of and need. Also, an Orbit can be something like Project X which may be a temporary project or event and when done can be deleted as an Orbit without any members themselves being deleted from the VIPorbit® database.

Now, with this understanding, if you want to reorder the Orbit list, tap Reorder in the upper right of the screen then tap and hold the ☰ icon and drag it up or down to reposition. Tap "Done" when you're finished.

TIP – *You can change your Orbit list based on your activity and it's priority. If you are traveling and have customer meetings, it might be easier to have your Travel Orbits on the top for quicker access.*
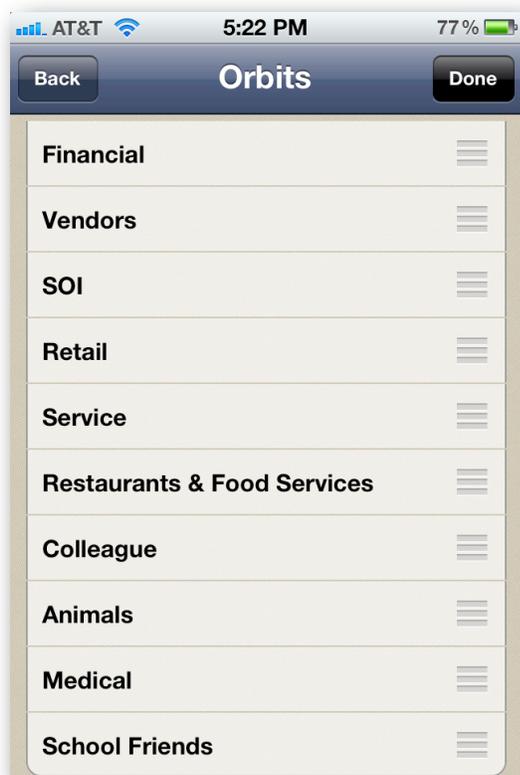
TIP - *You may also want to consider creating an Orbit called "Me" or "Me - Misc" that only has your contact record as a member. Now you can schedule Calls, Meetings, or ToDo's that are not associated with any other contact. I have found this to be a useful way to keep track of, and retain as a log item, those items that are not associated with any other contacts in your database. For example, you might want to schedule a todo for every 6 months to change the air conditioning filters in your home.*

Owner Info
The email address in Owner Info is used by the app to email the reports you create in More > Reports, Import & Export.

Backup My Stuff
This is where you Restore from backup. If you have subscribed to the service, tap Restore and you will see a list of your last 10 backups. Each backup is date and time stamped and includes the number of contacts in that backup.

Tap Restore and select a file. You are asked to confirm the action. Choose Restore. You will be prompted to confirm that the app will close to complete the restore process. Tap the VIPorbit® icon to restart.

TIP - You will need to complete the in-app purchase of Backup My Stuff before you can use this feature.

Manage Security

Passcode Lock

You can set a passcode that you must enter each time you launch or wakeup VIPorbit® to prevent unwanted access to your data.

Turn Passcode On

To set a passcode: Choose More > Manage Security > Turn Passcode On and enter a 4-digit passcode, then enter the passcode again to verify. The app now requires you to enter the passcode to unlock it or to display the passcode lock settings.

Change Passcode

To change a passcode: Choose More > Manage Security > Change Passcode. Enter the current 4-digit passcode, enter a new 4-digit passcode again to verify.

Set Security Questions

To set a security question: Choose More > Manager Security > Set Security Questions. Tap on Security question 1 to select, enter an Answer and repeat for Security question 2. Tap Save when complete.

TIP – Do NOT forget your passcode. If you forget your code the only way to regain access to your data is to delete the app from your iPhone, reinstall and restore your last saved backup. For your security, VIPorbit® Software Int'l, Inc. does not keep a record of this information.

TIP – Save your passwords and pin-codes in a safe place, preferably not on your mobile device, unless it is very well secured.

Manage Password

If you've forgotten your password you can use the section to reset it to a new value. For your protection, VIPorbit® does not store or have access to your password.

Reset Password

To reset your password: Choose More > Manage Security > Reset Password and you'll be redirected to a web page asking you to enter your username or your email address associate with our username you used to register VIPorbit®

__TIP__ – Do NOT forget your passcode. If you forget your code the only way to regain access to your data is to delete the app from your iPhone, reinstall and restore your last saved backup. For your security, VIPorbit® Software Int'l, Inc. does not keep a record of this information.

__TIP__ – Save your passwords and pin-codes in a safe place, preferably not on your mobile device, unless it is very well secured.

Contacts

THE CONTACT LIST

The contact list shows a quick summary of the contacts in your database while the tab bar indicates the current Orbit.

__TIP__ – To change the sort order of the Contact list between First Name/Last Name, go to the iPhone Settings > Mail, Contacts, Calendars and look under the Contacts section. Change the sort order to your preference. You will need to force quit VIPorbit® and restart for the changes to take effect.

From Apple:
To force quit an app: Press and hold the On/Off Sleep/Wake button for a few seconds until a red slider appears, then press and hold the Home button until the app quits. On iPhone 3GS or later running iOS 4.2 or later, you can also remove an app from the recents list to force it to quit.

To view the most recently used apps (iPhone 3GS or later): Double-click the Home button. The four most recently used apps are shown at the bottom of the screen. Flick left to see more apps. To remove an app from the recents list: Touch and hold the app icon until it begins to jiggle, then tap "-".
The app is added to recent apps again the next time you open it.

TIP – The country will only display if it differs from your country that you entered during registration or edited in More > Owner Info.

TIP – Tapping the circular Orbit icon in the upper left of the Contact List screen will change the Orbit sort order from alphabetical to the order you can customize in More > Manage Orbits > Reorder.

TIP – Double-tapping on the Contacts tab on the bottom Nav bar from anywhere in the app will take you back to the Contact List.

CONTACT DETAIL SCREENS

Details screens are all accessed the same way. Find a contact, tap on it, then tap on the Details button. The first contact detail screen is Phone Numbers. Scroll up and down to view all fields. Swipe left to right to navigate among the three detail screens. To add or edit the contact details tap Edit in the top upper left of any contact detail screen.

The contact detail is organized in the following way:

Phone Numbers
Phone numbers
Email addresses
Assistant
Status

TIP – Use the Status field to categorize your contacts for running reports or quick access using Find.   For example, populate the Status Picklist with values like Customer

or Prospect if you are in sales, use Corporate or Personal if you're a tax accountant, etc.

User Fields
Use the User Fields to personalize the app for the information that you want to collect about each of your contacts. Information that represents the type of details you need to build your relationships. There are 6 User Fields for you to customize.

Addresses
Physical addresses, URL and social id's.

TIP – Notice the three dots on the bottom of the screen. This indicates the current detail screen.

TIP – If you have not customized the User Fields on the second contact detail screen, as well as the activity regarding and outcome fields, go to More > Customize Fields and do so now.

TIP – Tapping on a "hot" field like a phone number, physical address or email address will start a process like calling the number, launching Google maps or sending an email. Tapping on a "static" field like a user field will not enable you to edit that field. Instead, tap on the Edit button on the top right of your contact detail screen to enter edit mode.

TIP – Take a picture of your contact with your iPhone and add it to your contact record by pressing the "Add Photo" icon.   If you have photos in your iPhone contact address book list they will be included in VIPorbit when you import from More > Reports, Import & Export.

ORBITS
Use Orbits as a way to group your contacts into meaningful spheres of influence.

NOTE: There are two special Orbits. All and Faves. "All" is just that. It is all of your contacts.

Faves is for the people you contact most often. Put them in Faves and you have an instant way of contacting them.

To add a contact to Faves:

- Find the contact by either scrolling through the contact list or using Find. Tap to reveal the Phone Numbers contact detail screen.
- Scroll to the bottom of the screen and tap Add to Faves.

You will be prompted to choose contact methods. Now when you tap Faves from the contact list and tap a contact, you can instantly call, text or email that contact.

To remove a contact from Faves, access the Phone Numbers contact detail screen and tap Remove from Faves.

TIP – Connecting to a contact from Faves does not create a log entry. Use Faves for calls to family and friends that do not require a Log entry.

TIP – You can create an Orbit by pressing the "+" button and selecting "Create New Orbit", or you can do a Find and use the results to fill an Orbit.

TIP – You can delete a contact from an Orbit by dragging and dropping it on to the status bar. This will not delete the contact from the database, UNLESS you do this action from the "All" orbit. If you do drag and drop a contact from the All orbit, it will be permanently deleted.

CREATING CONTACTS

From the contact list:
- Tap the "+" in the upper right corner of the screen. Tap Create New Contact. You are now in edit mode and ready to enter the contact details.
- Tap Add Name to add a name, title and company. Type in First Name, Last Name, Title and Company Name. Tap Done.
- To personalize the contact, tap Add Photo. You can either take a picture now using the Camera option, or select a picture from the Camera Roll.
- Continue adding the contact details and tap Done to save. Don't forget there are three detail screens that you can populate upon creation of a new contact!

CREATING ORBITS

From the Contact List (remember you can double tap on the Contacts icon to get to the Contact List):
- Tap the "+" and Create New Orbit.
- Tap the Name to give your new Orbit a name. Tap Save. Optionally, give the Orbit a description and tap Save.
- Tap the Tab Color bar if you wish to customize the color. Tap an area in the color wheel and Tap Done.
- If you are ready to add contacts to the Orbit, do so by tapping the Save and Add Contacts.
Tag the contacts you want to add using the check box to the left of the contact name. VIPorbit® shows the "All" Orbit by default. If you want to select contacts from an existing Orbit, tap Orbits from the menu above the list. If you have created a "Last Find" (query), you can use that to populate the Orbit. The "Find" feature is explained in detail later.

ADDING CONTACTS TO AN ORBIT

To add an existing contact to an Orbit, tap and hold the contact and drag it to the Orbit tab. Notice that the message box changes as you hover over the Orbit tabs. If a contact is already in a specific Orbit, VIPorbit® will let you know.
**Remember, you cannot drag & drop a contact to the Faves.

If the contact is not in the Orbit, you will see a bright green message and you can drop the contact into the Orbit. This should enable you to categorize your contacts in a way that will work for you.
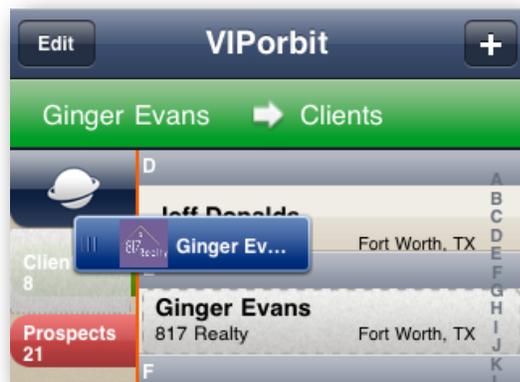
TIP - The easiest way to add contacts to an existing Orbit from the Contact List is drag & drop. Simply tap and hold a contact and drag it to an Orbit. You'll know you're hovering above the correct Orbit when you see the message above the contact list.

TIP - Do not drag the contact directly on top of the Orbit you wish to put it in. Instead, hover the contact just above the Orbit and look for the green indicator shown above. Once you then have dragged-and-dropped the contact into the Orbit, the number of members should increment by one, assuring you that it has successfully been added.

CHANGING THE ATTRIBUTES OF AN ORBIT

You can double-tap on any Orbit tab from the contact list to change the color, description or the order in which the Orbit tabs appear. To delete, tap Delete Orbit. Tap Done when finished. With version 2.0 forward, there were also some additional features added here.

Send SMS/Email to Orbit

When you tap on one of these new buttons it will bring up a New Message or New Email with the contact numbers or email addresses already populated. After tapping to send the message it will insert a Log entry for that contact just as if you messaged or emailed them individually. It will also log if perhaps a contact in the orbit did not have a phone or email address populated. It's recommended you review your contacts primary

phone and email addresses prior to using this feature. Only one phone number can be the primary, the same for an email address. The primary is always the first one if there are multiples. If you wish to change the primary tap Detail, tap Edit, tap the phone number or email address you want to make primary and turn the slider for Primary For Group Mail to ON. For SMS it will say Primary For Group SMS.
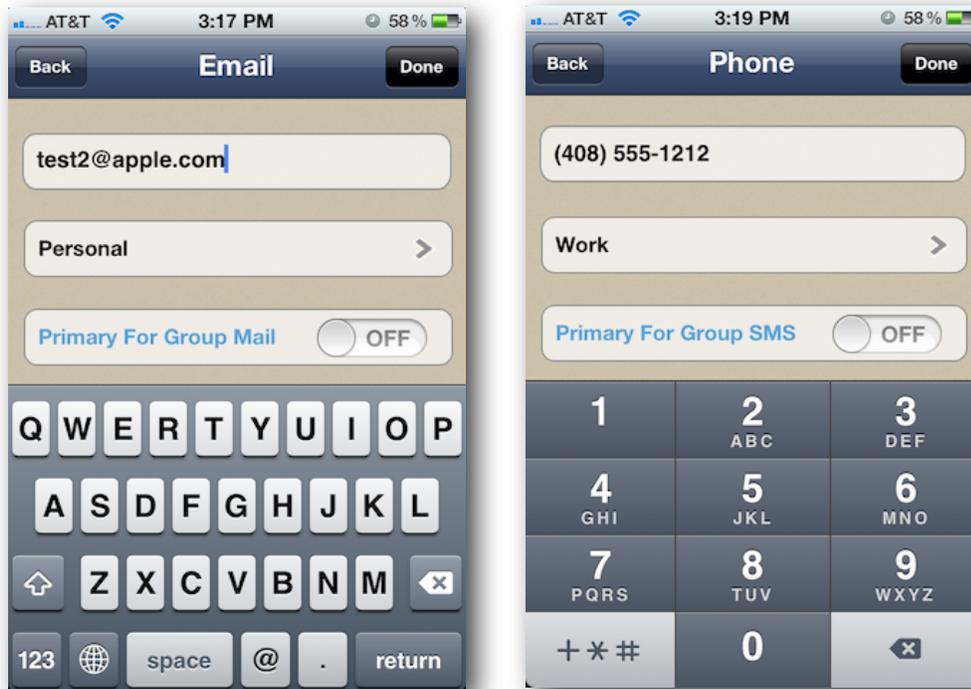
TIP - *When you change a phone number or email address to primary, it automatically changes the others to OFF and moves it to the top of that group list.*

TIP - *Depending upon your email service provider, selecting an Orbit with a large number of contacts to email might get flagged as spam. Be sure and consult your email service provider if you have any questions.*

TIP - *If a landline is the primary phone number on a contact, your SMS will most likely not go through. Remember to review your contacts' primary phone numbers before using this feature.*

Update All Contacts in Orbit

When you tap this button it will bring up the same three screens you see when you add or edit a contact. This is most useful when a company name or address changes. Or, perhaps you've populated an Orbit based on a specific value in Status or a user-defined field and now want to change that value. When you tap to Save you will be reminded that this will update all of the contacts in the Orbit and there isn't a way to undo the changes.

Tip *– Use this with caution! Remember you're updating all the contacts in that Orbit.*

FINDING A CONTACT

Tap on the search bar on top of the contact list to quickly find a single contact. Or, use the alpha index on the right side of the contact list to "jump" through the list until you are close enough to the contact you are looking for to simply scroll to it.

For more complex searches use Find from the tab bar. For more details on using complex searches refer to the Find section below.

ADD TO FAVES

Adding a contact to the Faves Orbit allows you to quickly connect to the contact without the need to access the detail screen. To add a contact to Faves:
* Tap the Add to Faves button on the bottom of the Phone Number contact detail screen.
* Choose the phone number and email address you wish to use to quick connect from the Faves Orbit.
* Tap Save.

COPY CONTACT

To save typing, you can copy the demographic information of an existing contact and enter just the unique information for the new contact, e.g. contact name.

To copy a contact:
* Find the existing contact.
* Tap Copy Contact at the bottom of the Phone Numbers detail screen. The address information from the existing contact is entered automatically.
* Add unique information.
* Tap Save.

TIP *- Use Copy Contact to enter many similar contacts, like colleagues from the same company when entering data from a stack of business cards. Enter the first one manually and copy the contact information for subsequent contacts.*

DELETING A CONTACT

To delete a contact:
* Go to the contact list by double tapping the Contacts tab on the icon bar. Tap Edit on the top upper left of the screen.
* Tap the red "stop sign" to the left of the contact you want to delete.

- Tap Delete and you will get one more chance to change your mind. Confirming the Delete will permanently remove the contact from your list!

TIP - *To delete a contact from the Contact List, tap and hold a contact. Look at the top of screen and you'll see "X Drop here to delete". If you are in the All Orbit, you are permanently deleting the contact and you will be asked for confirmation. If you are in a custom Orbit, the contact will be removed from that Orbit but NOT permanently deleted.*

TIP - *If you accidentally delete a contact but you still have the information in your iPhone contact list, simply import contacts from the More tab and the contact details are imported again. Any changes that you made to the contact in VIPorbit® will not be included when you reimport.*

With version 2.0 we've taken away the drop-down menu and implemented a Contact Summary screen with easy access to all of the same functions. This is the first screen you see when tapping a contact from the Contact List. Notice also the quick-tap call and email buttons in the top of the Contact Summary.

Details

Used to navigate to the 3 Contact Detail screens.

Log

Used to create and view Log entries. Many actions in VIPorbit® automatically generate a Log entry. For example, if you have scheduled a Call/Meeting/ToDo with a contact, completing the activity generates a log entry.

The Log is displayed in chronological order with the most recent date on top. Use the All/Calls/Meetings/ToDos/Log filters to refine the list.

- Tapping "All" (default) will show all Log entries.
- Tapping "Calls" will show only the Log entries that are associated with calls. Meetings" will show meetings. The same holds true for the "ToDos" option.
- The "Log" option shows all the notes items in a chronological order

To manually enter a miscellaneous note, or record details of an unscheduled activity, tap "+" in the upper right corner of the Log screen. Activity ON/OFF determines the Log type. Set Activity to ON to create a log entry for an unscheduled activity, or set it to OFF and enter a miscellaneous note.

TIP – Creating log entries for unscheduled activities can only be done for an event that happened in the past. It is a log of what happened, a history record. You will notice that when you select a date in the future, it automatically scrolls back to today. This is by design. If you want to schedule an activity, go to the menu and select Activities.

Activities

To view activities you have scheduled with a specific contact.
- Tap Today to view activities scheduled for today. To filter the list for Today, tap Calls, Meetings or ToDo's.
- Tap All to see activities for this contact scheduled for all dates. To filter the list for all dates, tap Calls, Meetings or ToDo's.

To schedule an activity from a contact detail view:
- Find the contact using the contact list or Find.
- Tap the Contact summary to go to the detail screen.
- Tap Menu and choose Activities.
- Tap + in the upper right hand corner of the screen.

The current contact is the only Participant by default. To add additional Participants for an activity, tap the arrow (>) next to the contact name and choose additional Participants by tapping the selection box to the left of the contact names. You can add more participants from any or all the 3 selections shown - All | Orbits | Last Find. Tap Next in the upper right corner and edit the details of the activity.

Edit the activity details and tap Save to save the activity to the calendar.

Connect

Connect

To connect to the contact with a single tap.

The Connect options with associated connection information are highlighted, active and ready to use. If an icon is dimmed, you will need to add the associated connection information. To add the information, either tap the Connect option or tap Menu to display the Menu options then tap the Detail icon and Edit.
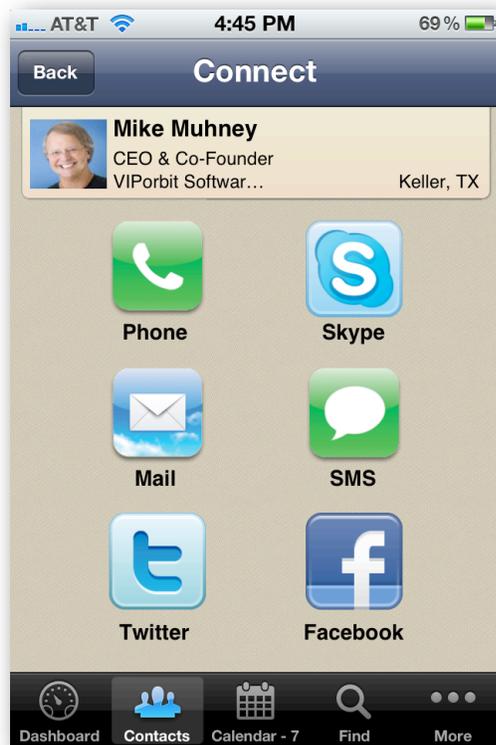
Any connection made will generate a Log entry that is viewable by tapping the Log icon on the Contact Detail Menu.

TIP – If a Connect option is not highlighted (colored), it is because the connection information is not in the contact record. Tap the connect option to enter the info.

Orbits

Orbits

Tapping on the Orbits Menu option displays a list of the Orbits of which the current contact is a member. Tap the Orbit name to see a list of all contacts in that Orbit.

Tap + in the upper right corner of the screen to:

>	Add Contact to an Orbit – displays a list of Orbits from which to choose.

>	Create New Orbit – prompts for a name and description and automatically adds the current contact as a member.

vipLinks

vipLinks

Use vipLinks to create a link between two or more otherwise unassociated contacts. Use vipLinks to track "who knows who" and begin to create "personal networks" within your contact list.

To link contacts:
- Tap + in the upper right corner of the screen.
- Select the contact to link to the current contact. The vipLinks you create will also appear on the selected contacts to create a bi-directional link.

TIP – vipLinks is one of the most powerful features in VIPorbit®. It's the easiest way to map your contacts to each other to enrich your knowledge about relationships that exist between the contacts you already know. The value of vipLinks can be enormous. With foreknowledge of who-knows-whom, you can more effectively and productively conduct your business along with expanding your reach within your contacts and Orbits.

Calendar

The power of the calendar in VIPorbit® is the association of every activity to a contact. This enables the app to track all communications with a contact and build a holistic view of the relationship.

The calendar views accessed from the Calendar tab differ from the activity view on the contact. The Calendar view displays ALL scheduled activities for ALL contacts.

LIST VIEW

The List View displays activities in a simple list organized by day and time. The list is scrollable to move forward in time, and may display any past activities as well if you didn't set to automatically roll-over in More > Calendar Preferences. Tapping an activity will display the activity detail enabling Delete, Complete or Editing the activity.

DAY VIEW

Tap a day on the month view to see a single Day view of activities organized chronologically. Tapping an activity will display the activity detail enabling you to Delete, Complete or Edit the activity. You can tap the a contact name associated with the activity to go the contact detail record.

TIP – Activities appear in the List and Day Views in two different colors, blue and gray. The gray italicized activities are activities imported from iCal, when the setting in More > iPhone Calendar preference is set to On. These activities are read-only and are not inked to a contact. Blue indicates activities you scheduled within VIPorbit®.

MONTH VIEW

The month view uses colored dots to indicate individual activities and colored lines to indicate activities scheduled for a date range.

The dots and lines correspond to Calls, Meetings and ToDos as indicated in the title bar at the top of the month view calendar.

You can filter which activity type to include on the calendar by tapping Calls, Meetings, ToDos or All.

Navigate from Month to Month, or on the Day view from Day to Day, using the left ◁ and right ▷ arrows on either side of the filter bar.

The option bar allows you to display activities in List, Day or Month views. You can also choose to define a Custom date range for displaying activities.

TIP - A line on the month view indicates that there are activities without a time associated with them, and can also mean that you have blocked out an entire day, or days, to indicate activities like a conference you are attending or a scheduled holiday.

To view activities in a date range, use the Custom option.

To view a date range:
- Tap Custom
- Tap Start Date/Time select the start date.
- Tap End Date/Time.

- Tap Done.
- Activities scheduled for the date range specified are displayed in a List View.

TIP – *Notice that the tab bar icons Calendar and Find have a number. This indicates the number of activities planned for the day and/or the number of contacts in the current Find.*

Activities

SCHEDULING AN ACTIVITY

Scheduling an activity can be done from any of the Calendar Views as well as the Activity View from a specific contact.

To schedule from a calendar view:
- Tap the Calendar icon on the tab bar.
- Tap List, Day or Month.
- Tap the + in the upper right corner of the screen.

- Choose the Participants for the activity by tapping the selection box to the left of the contact name. You can choose one or many participants.


- Tap Next in the upper right corner and edit the details of the activity.
- Tap Save to save the activity to the calendar.

To schedule from a contact detail view:
- Find the contact from the contact list or Find.
- Tap the Contact summary to go the detail screen.
- Tap Menu and choose Activities.
- Tap + in the upper right hand corner of the screen.

   *By default, the current contact is the only Participant when scheduling from the calendar views. To add Participants, tap ">" next to the contact name and choose additional Participants by tapping the selection box to the left of the contact name. Tap Next in the upper right corner and edit the details of the activity.
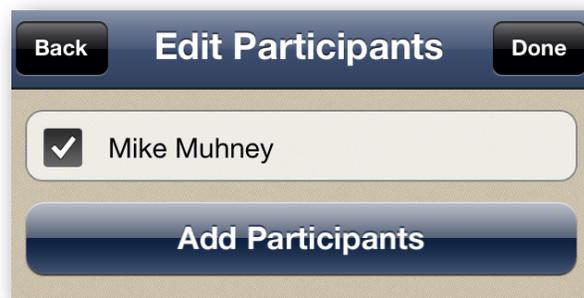
- Edit the activity details and tap Save to save the activity to the calendar.

TIP – Scheduling from the Calendar Views is the easiest way to do group scheduling.

Tap an activity to see the detail for an activity. From the activity detail you can chose to Delete or Complete or tap a name to go to the contact detail record. Delete removes the activity from the calendar without creating a Log entry.

To Complete an activity:
- Tap Complete
  - Tap a Picklist item(s) and tap Done; or
  - Tap Enter Manually to use the keyboard; or
  - Tap Add to Picklist to add a Picklist item(s) to use now, and in the future, to eliminate keystrokes.
- Tap Notes to enter free form text regarding the activity.
- Tap Complete to save.
- In version 2.0 the Log entries will show all the contacts that were participants in that activity.
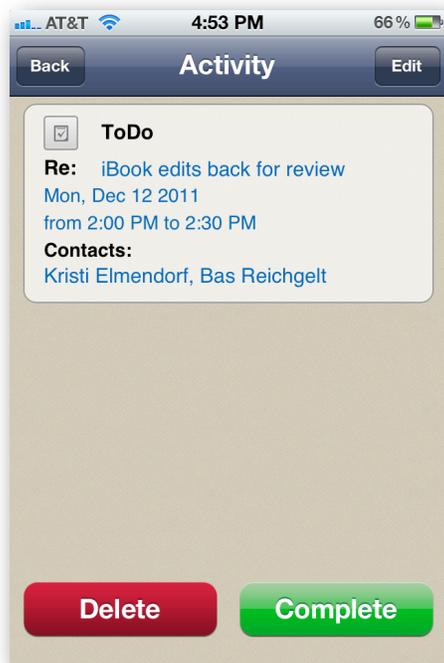
After Completing an activity:
- In version 2.0 we added a Schedule Follow-up button which creates a new activity for this contact with the default values populated.
- Still on this screen is the Edit button on the top right which creates a *copy* of this activity with all the same values populated. You are alerted to this when you tap the Edit button.
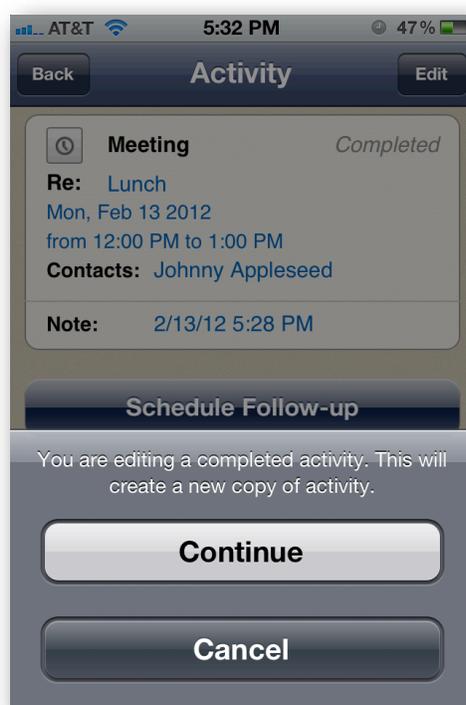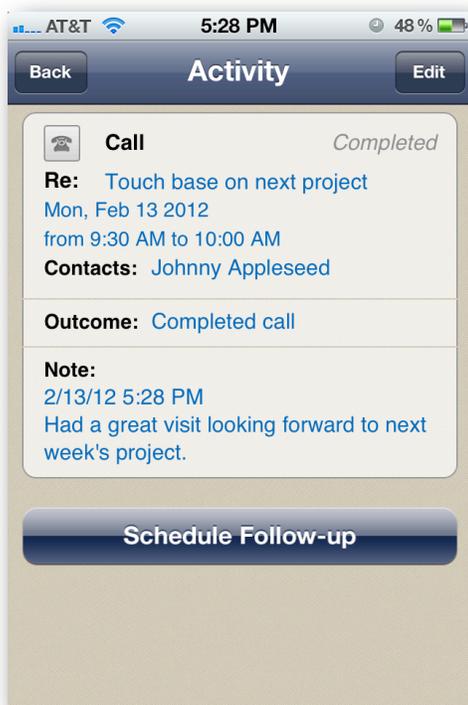
EDITING AN ACTIVITY

- Tap an activity from a calendar view or from the activities view of a specific contact.
- Tap Edit to change any of the details of the activity.
- Tap Save when done editing.

CONFLICT CHECKING

A warning will let you know when you are attempting to schedule an activity for the same time as another scheduled activity.

When the Conflict alert appears, tap the green conflict alert button to view the calendar and the currently scheduled activities. Tapping Done returns you to the scheduling process to either continuing scheduling with the conflict, or chose a different date and/or time.

TIP - *When you tap Conflict to view currently scheduled activities, you can tap any conflicting event and edit before returning to your intended activity entry.*

Find

The Find feature allows you to look for contact records based on single or multiple criteria. The feature also gives you the ability to save Finds for repetitive use, or create an "ad hoc" list for one time use. In version 2.0 we added Country to the search values for Find.

To Find a contact or group of contacts:
- Tap the Find icon on the tab bar.
- Tap in a field and the keyboard appears enabling you to fill in the search criteria using one or more fields.
- Tap "Next" or "Previous" to navigate from field to field.

To execute based on the current criteria:
- Tap Search on the keyboard or tap Done and tap Find at the bottom of the screen.

You can also tap Clear from the bottom of the Find screen to start over.

To Save the Find:
- Tap Save before you execute the Find.
- Tap Save Find Criteria.

To execute a Saved Find:
- Tap the Find icon on the tab bar.
- Tap Saved Finds in the upper left corner of the screen.
- Tap Go to Saved Finds.
- Tap the criteria and a list of matching contacts will display.

When you have completed entering the criteria, you can either execute the Find or save it for easy access later.

NOTE: You are saving the query criteria, not the results of the query. That can be done using another function once results have been found.


Tapping Edit on the top of your screen will enable you to delete a Saved Find.
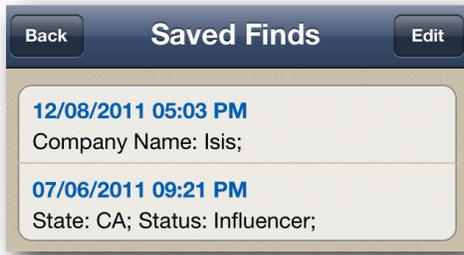
When Find results display, tap a contact to go to the detail screen or:
- Save Results as an Orbit – Tapping this option prompts you to name the Orbit and, optionally, provide a description.
- Add to Existing Orbit – Tapping this option displays a list of Orbits to choose from.
- Add to Ad Hoc List – This option allows you expand or narrow your search by refining the criteria.
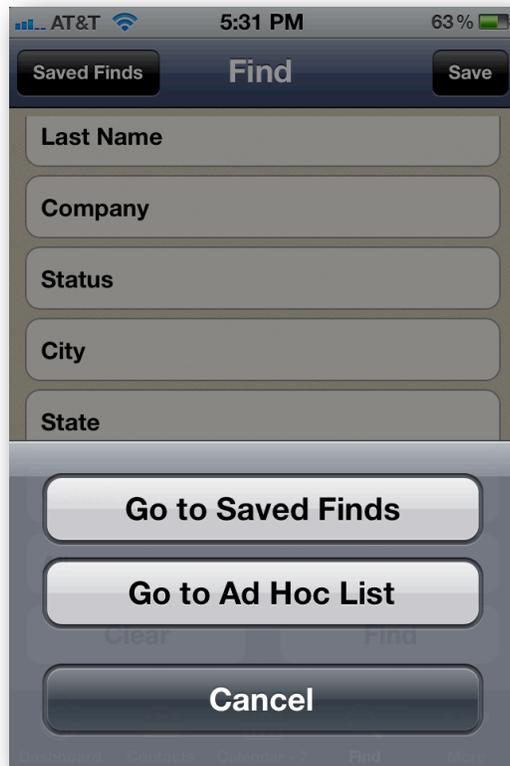
TIP - Adding a Find to an Ad Hoc list enables you to search more complex situations. For example, find all contacts with a city of Dallas, then Amsterdam, where the status is also Investor, etc.

TIP – The tab bar Find icon may have a number that appears. This indicates the number of contacts in the current Find.

Additional Resources

Visit the website at http://www.viporbit.com for the latest and greatest news and release information.

Check out the Solutions page at www.viporbit.com/solutions fo industry specific and/or business function examples like Sales, Real Estate, and Multi-Level-Marketing.

Visit http://www.viporbit.com/support to view FAQs, provide feedback or send a question to support.

Sign up to follow VIPorbit® on Twitter, Facebook and LinkedIn via www.viporbit.com or from the info screen in the app.