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1 Welcome



Welcome to the Home Manager User Guide

If you have just started using Home Manager, check out the Introduction and Getting Started links below. More details can be found in the Reference and How To section.

- > [Introduction](#)
- > [Getting Started](#)
- > [Reference](#)
- > [How To \(Steps\)](#)

2 Introduction

Home Manager is an easy-to-use database for tracking information about your home and personal belongings. Home Manager provides a central repository for storing and retrieving your Home records, allowing you to quickly look up information about a specific item at any time. A free trial version is available on our website and can be set up in minutes so you can try the full functionality of the software.

What It's For

Do you need a way to track all of your "stuff"? With Home Manager you can organize and track your home inventory. Easily enter the details about your belongings, and use the built-in search feature to find it again quickly. If you already have a lot of digital pictures, simply drag and drop them into the program to automatically create new inventory items for each one.

Organize your inventory by category and location, and drag and drop items from one category to another. Keep a running maintenance and repair history for your assets. Print a home inventory report (complete with digital pictures) for your insurance agent; backup your data for safekeeping, and get the peace of mind that comes with having a full accounting of your home inventory.

Home Manager Helps You Get Organized

You have better things to do with your time than searching through paperwork or digging through old paint cans looking for that lost color code. Now you can stop the frustrating searching and take control. With Home Manager software you can have all the information you need about your home right at your fingertips.

Be Prepared For The Unexpected

Sadly, every year natural disasters like earthquakes, fires, floods, tornadoes and hurricanes leave people without a home and with their possessions lost or destroyed. Without a detailed record, making an insurance claim can be a hassle at best. Whether you own your home, or rent an apartment, insurance companies recommend that you keep a current home inventory record to assist in the event of an insurance claim. Home Manager gets you started by building a complete home inventory. You can track warranty and insurance information, and even include digital pictures to assist in the unfortunate event of

an insurance claim. Use the built-in backup feature to backup to a remote drive or email server

Features at a Glance

- ✓ Home Inventory Tracking for one or multiple residences.
- ✓ Track costs for home improvement and repair.
- ✓ Store your book and movie information in a database.
- ✓ Track warranty and insurance Information.
- ✓ Import an unlimited number of digital pictures.
- ✓ Search your inventory to find records fast.
- ✓ Backup your inventory to disk, floppy, or as an Email Attachment.
- ✓ Print report for off-site storage.
- ✓ Create your own custom categories and locations.

Home Manager Licensing

- Home Manager licenses may be purchased online with a credit card, bank transfer, or a check. The license key is delivered via email and unlocks the 10 record limitation of the trial.
- Home Manager licenses include free minor upgrades for the life of the version and major upgrades for one year. Upgrading is voluntary and not required to continue using the version of the software that has been purchased.
- Support by email is available free for both trial and licensed users (see additional support information in the next section).

Product	Number of users	Price (USD)*
Home Manager Standard Edition	Single User PC	\$29.99

*Prices in EUR and other currencies based on the exchange rate at the time of purchase.

Home Manager Support

All Home Manager support is available free by email. Additional paid support by telephone is not available at this time. This support model allows our customers around the globe to reach an appropriate expert for their specific technical, sales, or customer service question without wading through multiple levels of support and call backs. Support tickets may be submitted through the website at www.kzsoftware.com

See Also

- [Getting Started](#)
- [Reference](#)

2.1 Getting Started

Choose from the following topics to get started:

- [Installation](#)
- [Enter your license key](#)

Or for experienced users, jump to the [Reference](#) section.

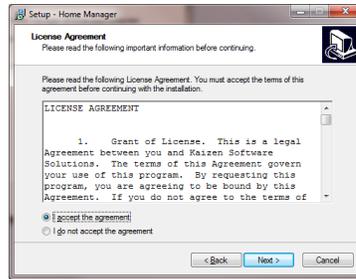
2.1.1 Installation

To install from the web:

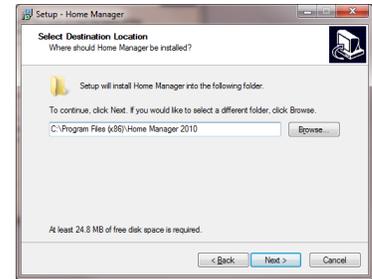
1. Download Home Manager from the website at:
<http://www.kzsoftware.com/products/home-inventory-software/demo.htm>
2. Open/Run the setup file, HomeManagerSetup.exe.
3. Follow the instructions in the installation wizard to complete the installation.



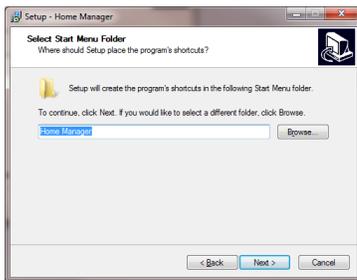
Open/Run the setup file to begin the Setup Wizard, and then click the Next button.



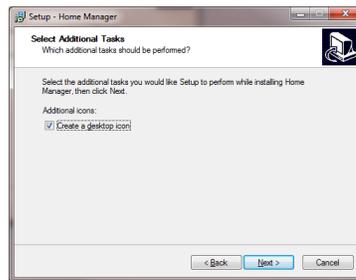
Read the license agreement, and then select "I accept the agreement" before clicking the Next button to continue.



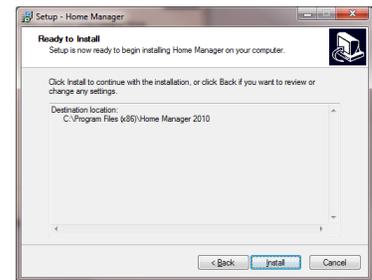
You may leave the default installation location selected, or select a different location if needed.



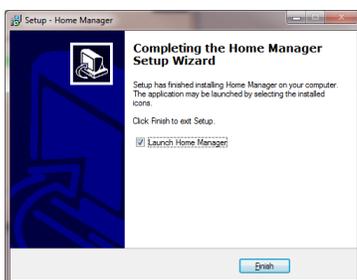
A shortcut will be created in the Start Menu Folder. Click the Next button to continue.



Leave the checkbox checked to create a desktop icon. Click the Next button to continue.



Click the Install button to begin the installation.



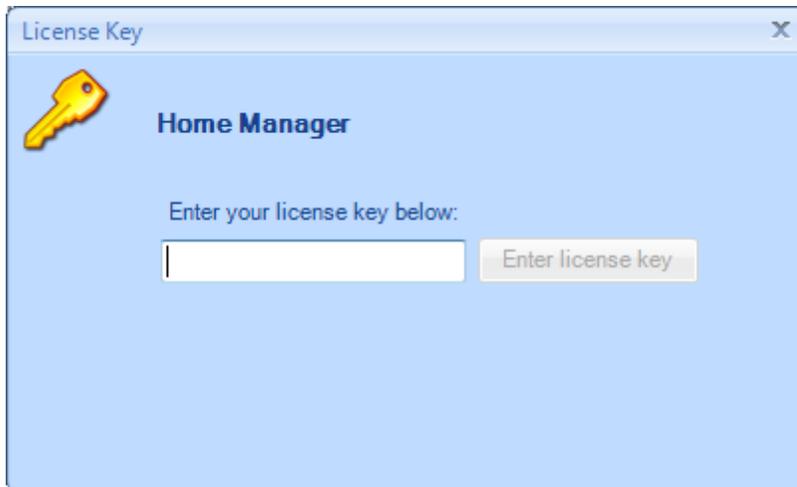
Click the Finish button and wait a few moments as the software initializes the first time.

Also note: if your computer does not have the .NET2 framework installed already, the installer will automatically download and install it before continuing.

2.1.2 Enter your license key

After [purchasing a license key](#), you will need to enter it into the software to unlock the 10 record limitation imposed while in Trial mode.

1. Select the menu item **Help** → **Enter License Key** (note: the menu items are the "text" links at the top of the window - not to be confused with the "buttons" in the toolbar).
2. Enter your license key into the License Key form.
3. Press the enter key or click the Ok button to save.

The screenshot shows a window titled "License Key" with a close button (X) in the top right corner. On the left side, there is a yellow key icon. The main area of the window has a light blue background and contains the text "Home Manager" in a bold, dark blue font. Below this, it says "Enter your license key below:" in a smaller, dark blue font. There is a white text input field with a thin border, and to its right is a grey button with the text "Enter license key" in a light blue font.

License Key Form

Note: The button will remain disabled if the key is invalid.

2.2 Reference

The Reference section provides a detailed explanation of each area of Home Manager. Click on a link below for details about the item.

- [Menu Bar](#)
 - [File](#)
 - [Help](#)
- [Inventory](#)
 - [General](#)
 - [Maintenance and Repair](#)
 - [Warranty and Insurance](#)
 - [File Attachments](#)
 - [Notes](#)
- [Reports](#)

2.2.1 Menu Bar

The menu bar is located at the top of the main window. Click on any of the menu items listed below for more information.

Menu Bar Items

- [File](#)
- [Help](#)

2.2.1.1 File Menu

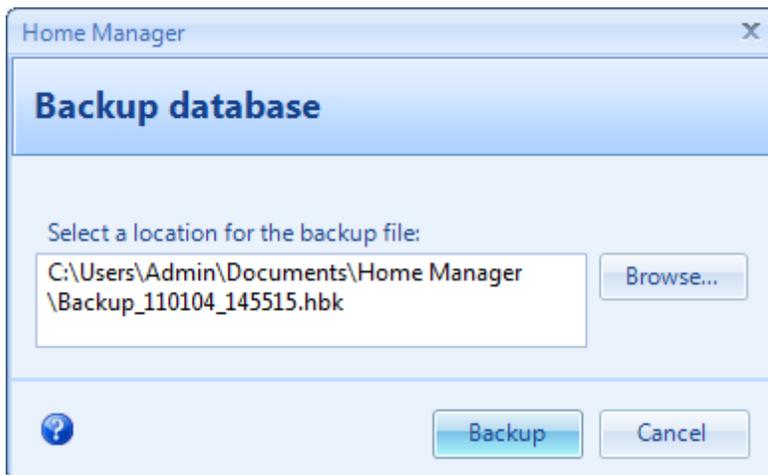
The **File** menu contains the menu items listed below. Click on a link below for complete details.

File Menu Items

- [Backup](#)
- [Restore](#)
- [Exit](#)

2.2.1.1.1 Backup

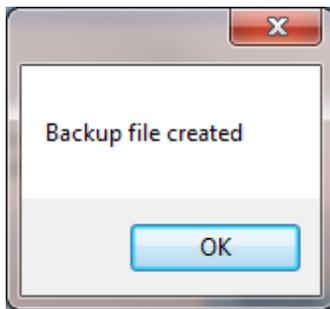
The Backup function creates a compressed data file containing a full backup of the database. This feature allows you to create a backup manually at any time.



Backup Database Dialog

Steps to backup a database

1. Select **File** → **Backup** to open the Backup database dialog box.
2. Click the Browse button to select a location for the file, and enter the name of the file to save.
3. Click the "Backup" button to perform the backup.
4. Dismiss the confirmation box. If the Backup operation fails for any reason, close the application and then reopen it and perform the Backup operation again.



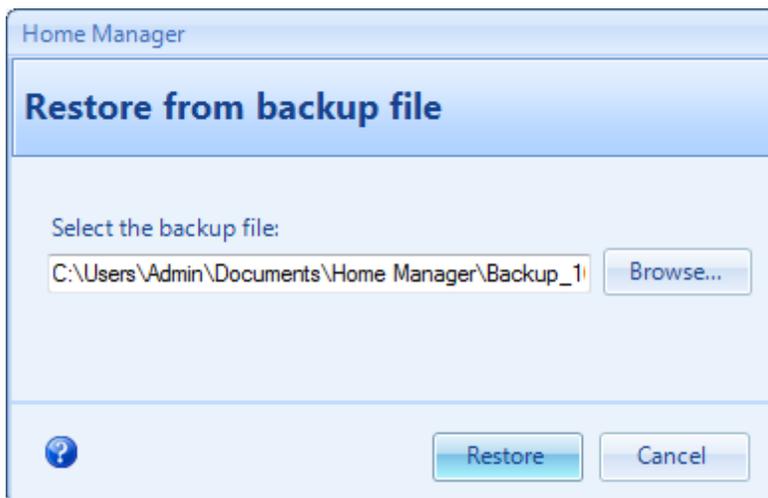
Confirmation Dialog

Key Points:

- ❖ The backup file is a compressed snapshot of the database. It cannot be opened directly. To restore the database from the backup file, use the menu option: **File → Restore**.
- ❖ Be sure to store the backup file on an external or remote drive so it will be available in case your hard drive crashes and becomes inaccessible. If possible, copy the file to a network server that is backed up. You can also attach the file to an email that you send to yourself in order to have it saved on your email server.

2.2.1.1.2 Restore

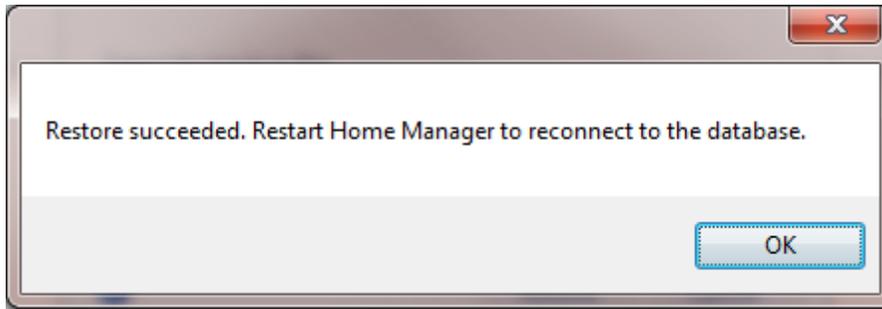
The Restore function restores the data from a compressed backup file over an existing database. This operation will completely overwrite the current database with the contents of the backup file.



Restore Database Dialog

Steps to restore a database

1. Select **File → Restore** to open the Restore database dialog box.
2. Click the Browse button and select a backup file that you have created earlier.
3. Click the Restore button and click "Yes" when asked if you want to proceed.
4. Wait while the database is restored. This may take several minutes for a large database. Do not interrupt the Restore operation, or the restored database may be corrupt.
5. Dismiss the confirmation box. If the restore operation fails for any reason, close the application and then reopen it and perform the Restore operation again.



Confirmation

Key Points

- ❖ The restore process may take several minutes to complete, and it should not be interrupted.
- ❖ The restore process will completely overwrite the database with the contents of the backup file. Any data entered since the backup file was created will be overwritten.

2.2.1.1.3 Exit

Select **File** → **Exit** to close the application. This has the same effect as clicking the 'X' in the upper right corner.

2.2.1.2 Help

The **Help** menu contains the menu items listed below. Click a link below for complete details.

Help Menu Items

- [Check for updates](#)
- [Ask a question/Send feedback](#)
- [About Home Manager](#)

2.2.1.2.1 Check for updates

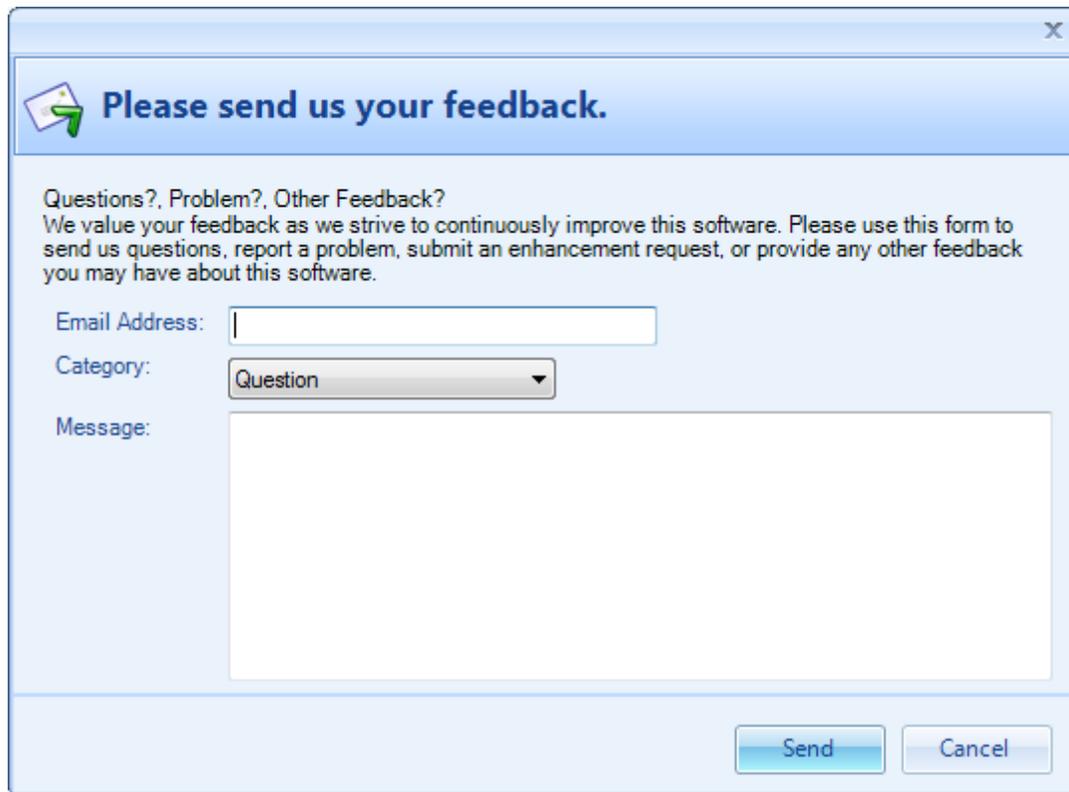
The **Check for updates** menu initiates a connection to our update server to compare the version of the software you are using with the current version of the software. A pop-up message will notify you to let you know whether you are using the current version of the software. If you are using an older version, you will be provided with an option to download the update. To install the update, download the setup file when prompted, and click Open or Run to update your software. Your database will remain intact, so you will not lose the data that has been previously entered.

If a firewall prevents you from connecting to our update server, you may also download the software from the downloads page on our website. This is the same software which can be downloaded through the Check for updates menu.

2.2.1.2.2 Ask a question

The menu option **Ask a question / Send feedback** will open a dialog box you can use to contact Support. You may use this form to contact us about:

- Question
- Enhancement Request
- Bug Report
- Other Feedback



The image shows a 'Feedback Form' dialog box with a light blue background and a title bar. The title bar contains a close button (X) and a header area with a document icon and the text 'Please send us your feedback.'. Below the header, there is a section titled 'Questions?, Problem?, Other Feedback?' followed by a paragraph: 'We value your feedback as we strive to continuously improve this software. Please use this form to send us questions, report a problem, submit an enhancement request, or provide any other feedback you may have about this software.'. The form includes three input fields: 'Email Address:' with a text box, 'Category:' with a dropdown menu currently set to 'Question', and 'Message:' with a large text area. At the bottom right, there are two buttons: 'Send' and 'Cancel'.

Feedback Form

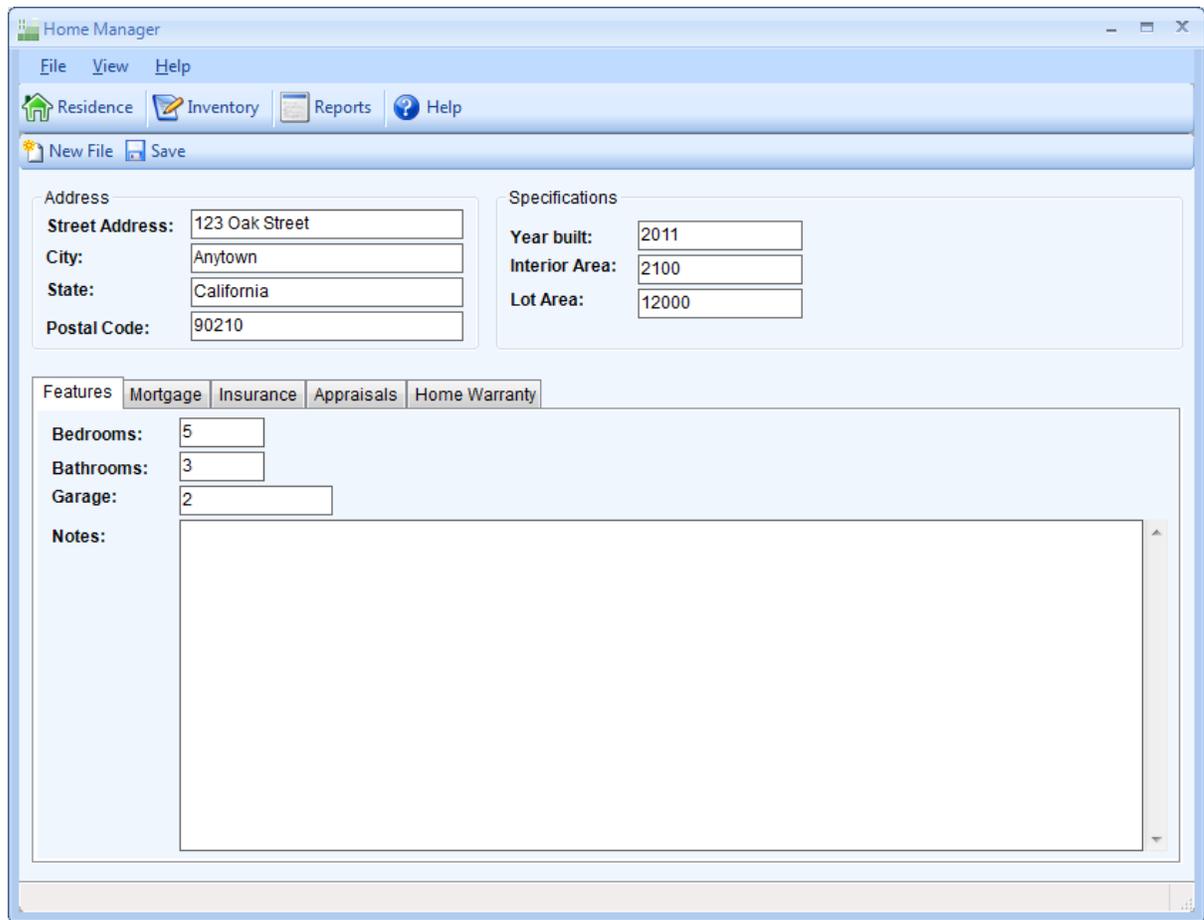
2.2.1.2.3 About Home Manager

The **About Home Manager** menu item opens a dialog box with information about the currently installed Home Manager software, including the version number.

2.2.2 Residence

The Residence screen contains general information about your residence including:

- Address Details
- Features
- Mortgage
- Insurance
- Appraisals
- Home Warranty



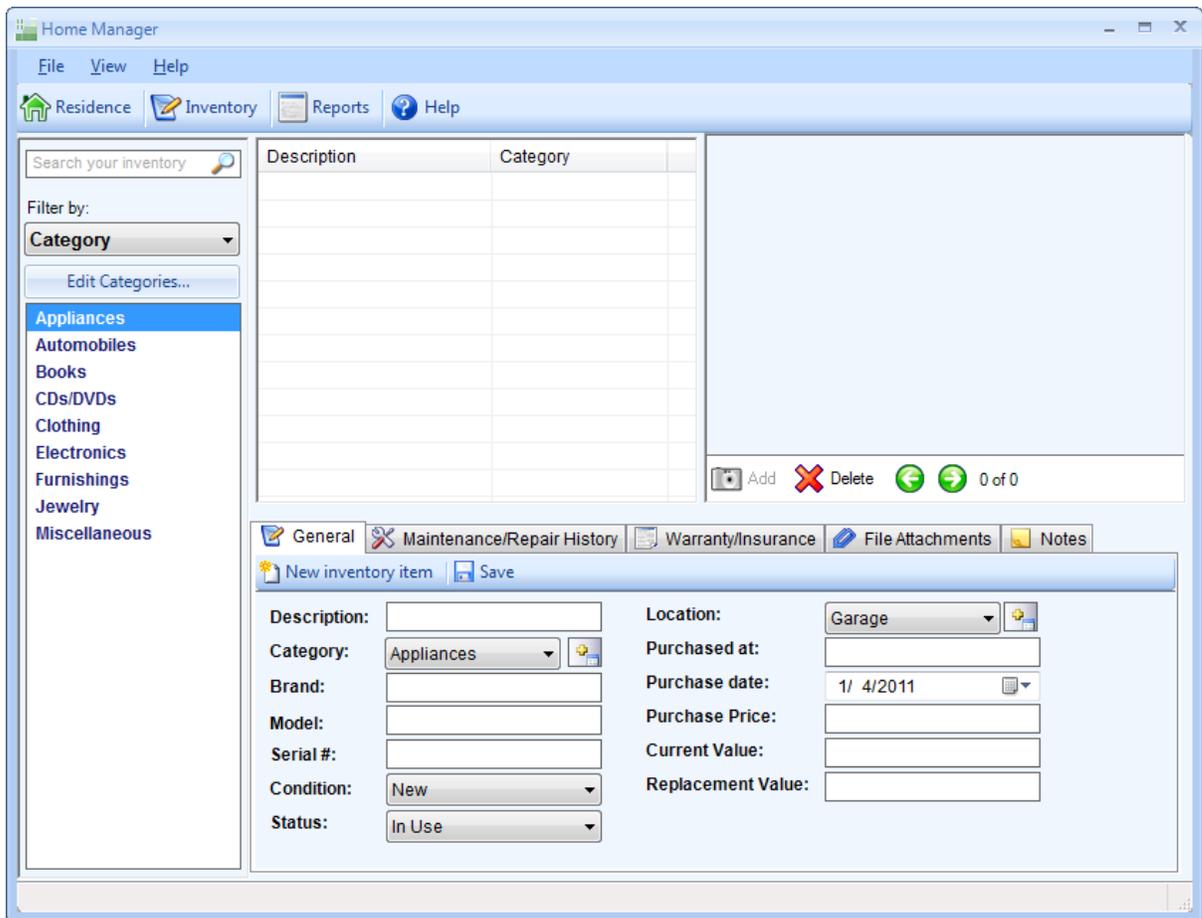
The screenshot displays the 'Home Manager' application window. The title bar reads 'Home Manager'. Below the title bar is a menu bar with 'File', 'View', and 'Help'. A toolbar contains icons for 'Residence' (a house), 'Inventory' (a clipboard), 'Reports' (a document), and 'Help' (a question mark). Below the toolbar is a 'New File' button and a 'Save' button. The main content area is divided into two columns. The left column is titled 'Address' and contains four text input fields: 'Street Address' (123 Oak Street), 'City' (Anytown), 'State' (California), and 'Postal Code' (90210). The right column is titled 'Specifications' and contains three text input fields: 'Year built' (2011), 'Interior Area' (2100), and 'Lot Area' (12000). Below these columns is a tabbed interface with tabs for 'Features', 'Mortgage', 'Insurance', 'Appraisals', and 'Home Warranty'. The 'Features' tab is active and contains three text input fields: 'Bedrooms' (5), 'Bathrooms' (3), and 'Garage' (2). Below the 'Features' tab is a large text area labeled 'Notes'.

Residence Screen

After filling in the desired information, click the "Save" button to save the changes.

2.2.3 Inventory

The Inventory screen contains the Search Box, Category/Location list, Inventory List View, Picture Box, and Data Entry tabs.



Inventory Screen

See Also

- [General](#)
- [Maintenance and Repair](#)
- [Warranty and Insurance](#)
- [File Attachments](#)
- [Notes](#)

2.2.3.1 General

The General tab on the Homes form is used to track additional information about the Home.

The screenshot shows the 'General' tab of a software interface for adding a new inventory item. The form is organized into two columns. The left column contains: Description (text field), Category (dropdown menu with 'Appliances' selected), Brand (text field), Model (text field), Serial # (text field), Condition (dropdown menu with 'New' selected), and Status (dropdown menu with 'In Use' selected). The right column contains: Location (dropdown menu with 'Garage' selected), Purchased at (text field), Purchase date (calendar icon with '1/ 4/2011' selected), Purchase Price (text field), Current Value (text field), and Replacement Value (text field). At the top, there are tabs for 'General', 'Maintenance/Repair History', 'Warranty/Insurance', 'File Attachments', and 'Notes'. Below the tabs are buttons for 'New inventory item' and 'Save'.

General tab

Fields and Form Elements

Field or form element	Description
Description	A text field to track the Description of the item. The description is displayed in the inventory list view and reports.
Category	A selection field to identify the Category of the item. Add, edit, or delete the Category values by clicking on the "+" button located to the right of the field.
Brand	A text field to track the Brand of the item.
Model	A text field to track the Model of the item.
Serial #	A text field to track the Serial # of the item.
Condition	A selection field to identify the Condition of the item.
Status	A selection field to identify the Status of the item.
Location	A selection field to identify the Location of the item. Add, edit, or delete the Location values by clicking on the "+" button located to the right of the field.
Purchased at	A text field to track the name of the store where the item was purchased.
Purchase date	A date field to track when the item was purchased.
Purchase Price	A numeric field to track the purchase price of the item.
Current Value	A numeric field to track the current value of the item.
Replacement Value	A numeric field to track the Replacement Value for the item.

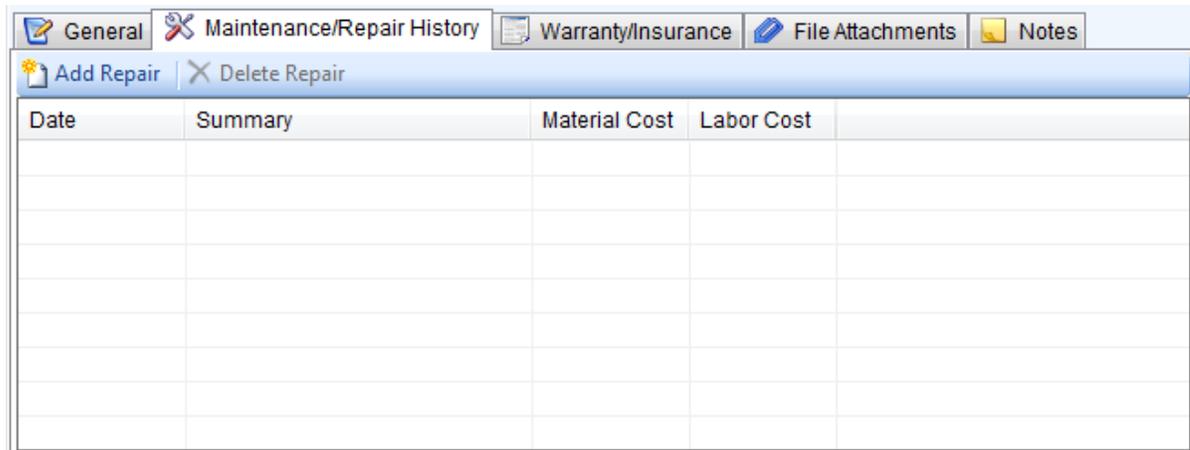
See Also

- [Maintenance and Repair](#)

- [Warranty and Insurance](#)
- [File Attachments](#)
- [Notes](#)

2.2.3.2 Maintenance and Repair

The **Service** tab contains a list of the service (maintenance, inspection, or repair) that has been completed for the Home.



Date	Summary	Material Cost	Labor Cost	

Maintenance/Repair Tab

- Click the New Service Entry button to add a new completed service entry, or to schedule service to be performed.
- For completed service, fill in the Completed Date on the service entry form.
- For Scheduled service, fill in the Next Due date on the service entry form.
- Fill in both dates to indicate the service has been completed and to reschedule it for future service.

Maintenance/Repair Entry form

Field Name	Description
Date of problem	A date field to track when the problem was first discovered.
Date of repair	A date field to track when the maintenance/repair was completed.
Summary of problem	A text field to provide a short summary of the problem.
Service Summary	A text field to provide a short summary of the service.
Material Cost	A numeric field to track the material cost of the maintenance/repair.
Labor Cost	A numeric field to track the labor cost of the maintenance/repair.

See Also

- [General](#)
- [Warranty and Insurance](#)
- [File Attachments](#)
- [Notes](#)

2.2.3.3 Warranty and Insurance

The Finance tab includes additional fields for tracking Finance related information.

The screenshot shows a software interface with a tabbed menu at the top. The 'Warranty/Insurance' tab is selected. Below the menu, there are buttons for 'New inventory item' and 'Save'. The main area contains four fields: 'Manufacturer Phone' (text input), 'Manufacturer Website' (text input with a globe icon), 'Warranty Expiration Date' (date picker set to 1/ 4/2011), and 'Warranty Information' (a large text area).

Warranty/Insurance Tab

Fields

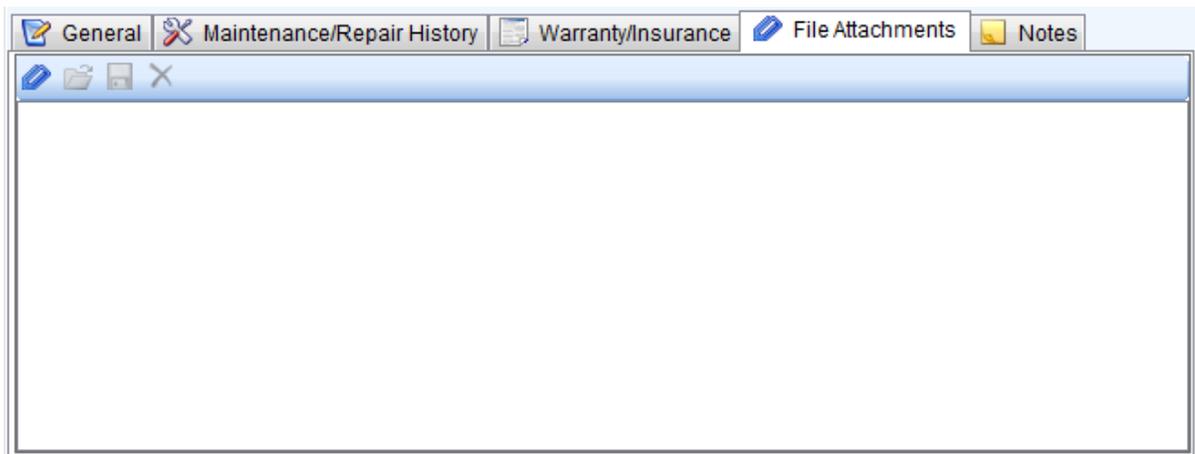
Field Name	Description
Manufacturer Phone	A text field for tracking the manufacturer's phone number.
Manufacturer Website	A text field for tracking the manufacturer's website address. Click the Globe icon to open the website in a web browser.
Warranty Expiration Date	A date field to track the warranty expiration date.
Warranty information	A text field to track additional warranty/insurance information.

See Also

- [General](#)
- [Maintenance and Repair](#)
- [File Attachments](#)
- [Notes](#)

2.2.3.4 File Attachments

The File Attachments tab contains an area where files may be added to the database.



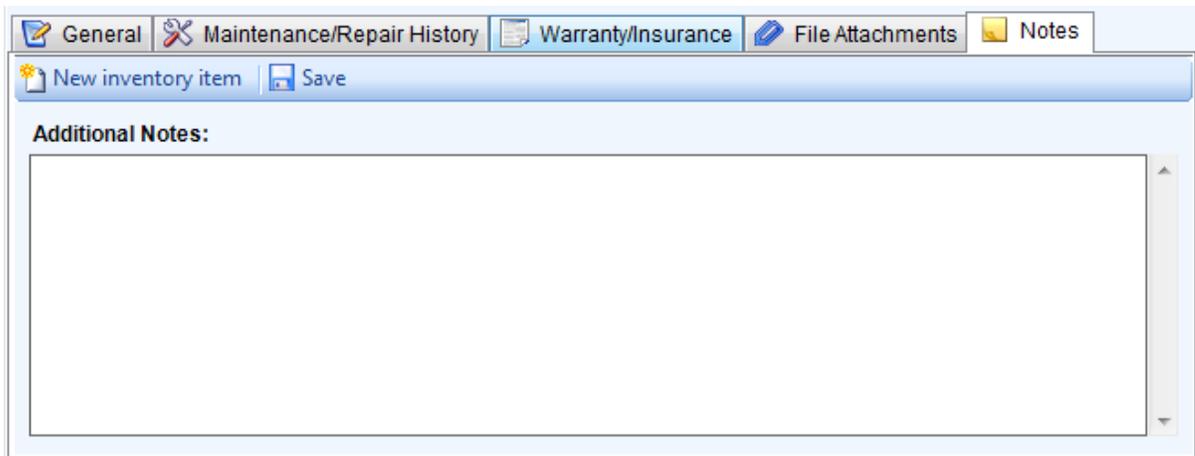
File Attachments Tab

See Also

- [General](#)
- [Maintenance and Repair](#)
- [Warranty and Insurance](#)
- [Notes](#)

2.2.3.5 Notes

The Notes tab contains a text field where free form text Notes may be added.



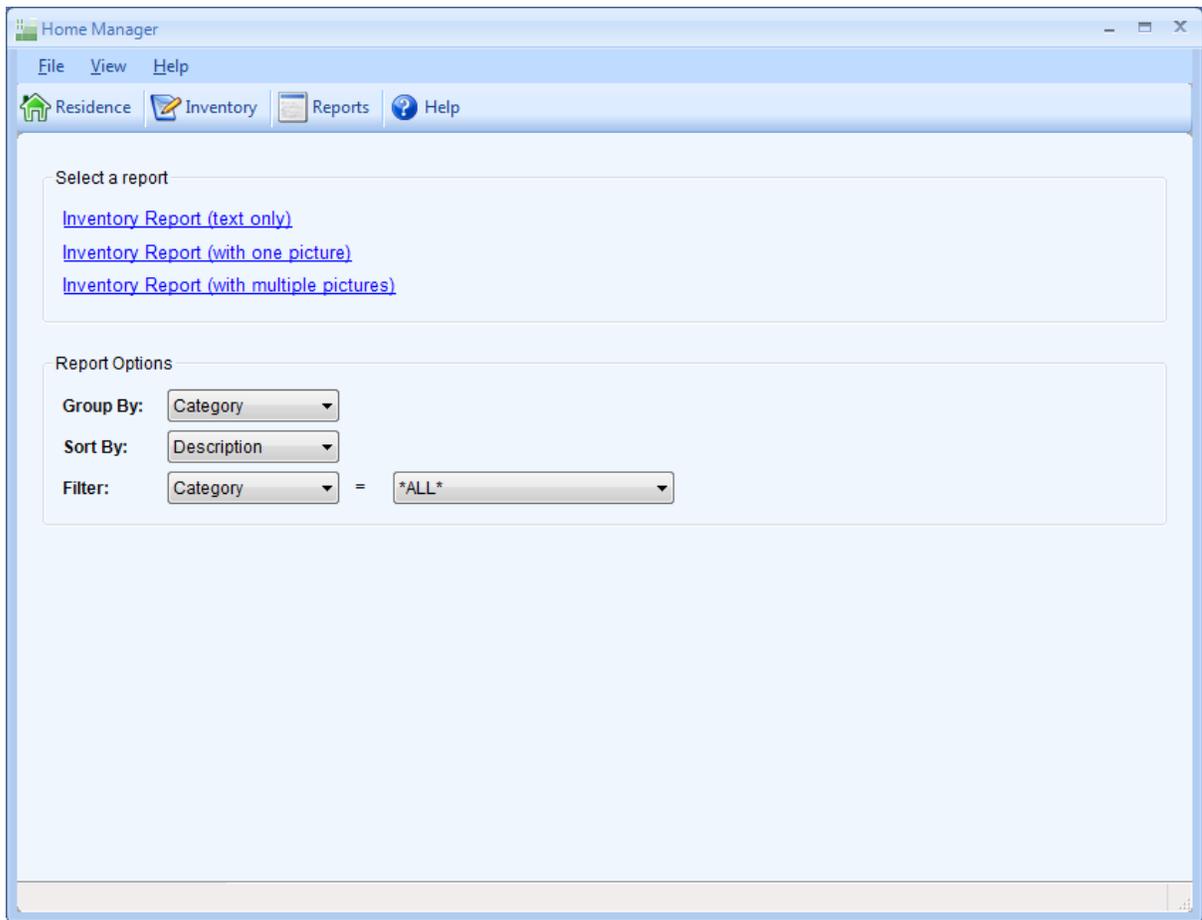
Notes Tab

See Also

- [General](#)
- [Maintenance and Repair](#)
- [Warranty and Insurance](#)
- [File Attachments](#)

2.2.4 Reports

Home Manager comes with 3 built-in reports which can be viewed on-screen, printed, or saved as a file.



Reports Screen

- Click on a report link to open it in a new window.
- Standard filters, grouping, and sorting options are available on the report screen.

3 System Information

- [File Locations](#)
- [Updating The Software](#)
- [Technical Details](#)

3.1 File Locations

Below is a listing of default file locations for Config, Database, and Log files for our software products. This information may be useful for special configurations or when diagnosing a connection error. In most cases you will not need to modify these files. If you decide to modify any of the files listed below, create a backup copy of the original file before changing it.

Config Files

File Name	Location	Description
[Program Name].exe.config	Program Files\[Program Name]	This file contains the default values that will be used to create

		the initial user.config file which in turn is used to store individual user preferences.
user.config	Local Users Application Data folder*	This file is created the first time a specific user opens the program, and it is updated as preferences are changed

Database Files

File Name	Location	Description
[Program Name].hdb	All Users Application Data folder* (on the client)	This is the raw Firebird database file used by the embedded client.

Log Files

File Name	Location	Description
log.txt	All Users Application Data folder* (on the client)	This file contains the log of any application errors that occur on the client.

*System Defined Folders

Local Users Application Data Folder:

The location of this folder varies according to the operating system:

- Windows Windows 7, 8, and 10: C:\Users\[user account name]\AppData\Local\Kaizen_Software_Solutions\[Unique Program ID]

You may also find this folder by typing %USERPROFILE% in the "Search" box and then drilling down into the appropriate folder.

All Users Application Data Folder:

The location of this folder varies according to the operating system:

- Windows Vista: C:\ProgramData\[Program Name]\[database file]

You may also find this folder by typing %AllUsersProfile% in the "Search" box and then drilling down into the appropriate folder.

These folder locations are hidden by default, so you may need to show all files and folders in order to find them (My Computer --> Tools --> Folder Options --> View tab --> Show all files and folders).

3.2 Updating The Software

Software Updates

As new releases become available, you may upgrade the Home Manager software as follows:

1. Make a backup of the database for safety (File --> Backup).
2. Use the menu option Help --> Check for updates, and follow the installation prompts, or if you are

unable to connect to our update server, close Home Manager, and then install the current version of the software from our website. This will not overwrite your existing database.

3.3 Technical Details

System Requirements

The initial installation will require 15mb.

The normal rate of growth of the database file without file attachments is 1 MB per 1000 records.

Pictures can be added at a rate of about 6 MB per 100 records.

If file attachments are added to records, the database will grow in size based on the size of the attachments.

PC:

- Minimum CPU: 1 Ghz
- Operating System: Windows 10 or higher.
- Notes: The setup process will download and install .NET 8.0 if it is not already installed.

Home Manager Database

- Home Manager stores all of the data and pictures in a single database file.
- Home Manager Database files have the file extension “.hdb”.
- Home Manager backup files are compressed to save space and have the file extension “.hbk”.
- Home Manager uses the open source Firebird database for data storage.
- The local database is stored at the following location:
Windows Vista: C:\ProgramData\HomeManager.hdb

4 How To (Steps)

Add a new inventory item

1. Click the "New Inventory Item" button on the General tab.
2. Fill in the item details.
3. Click the Save button on the General tab.

Notes:

- Select the Category and Location for the item from the drop-down list. You may add, edit, and remove Categories and Locations from the list by clicking on the button next to the drop down field.
- You may select the Purchase date by clicking on the down arrow and using the calendar, or you may type it directly in to the field.
- Currency symbols are not required. The reports will display the currency symbol set in your Windows Regional Options.

Find previously entered inventory items

Select the Location or Category on the left side of the Inventory window, and then look for your item in the Inventory List view, or use the search feature to search across all Locations and Categories at once. Items matching your search criteria will appear in the Inventory List view. The search function will look for inventory items with words on the General tab matching your search criteria.

Add a new Maintenance/Repair item

1. Select the Maintenance/Repair History tab at the bottom of the Inventory screen.
2. Click on the "Add Repair" button.
3. Enter the repair details in the repair item form.
4. Click the Ok button to save your changes.
5. The repair item will be added to the list.

Add the Warranty/Insurance Information

Select the inventory item in the list view, and then select the Warranty/Insurance tab. Fill in the Manufacturer and Warranty information, and then click the "Save" button.

Manage Categories and Locations

1. Click the button to the right of the Category/Location drop-down field.
2. Select the Category/Location in the list and then click "Edit" or "Delete", or click the "New" button to add a new category/location.

Add individual pictures

1. Select the inventory item in the list view.
2. Click the "Add" button near the bottom of the picture box area.
3. Select your picture, and then click the Ok button.
4. You may add multiple pictures to an item by repeating steps 2-3.

Note: you may also drag and drop a picture file from Windows File Explorer to the picture box.

Add pictures in bulk

If you already have a lot of digital pictures of the items in your house, you can create new inventory records for them automatically by dragging an entire group of pictures on the inventory list view.

1. Select multiple pictures in the Windows File Explorer.
2. Drag the pictures to the Inventory List View. This will create a new inventory item for each picture.
3. Update the item data for each as needed.

5 How To Buy

You may purchase Home Manager online worldwide with any major credit card.

As soon as your transaction is complete, your license key will be emailed to you, and you can enter the license key to continue working where you left off.

Purchasing Links

Direct Order:

<http://www.kzsoftware.com/purchase/homemanager/>

Additional Purchasing Options

<http://www.kzsoftware.com/purchase/options.htm>

6 Getting More Help

Technical Support and Customer Service is also available via email. You may contact us for additional help using the links below:

Contact Us

For Technical Support:

<http://www.kzsoftware.com/support/index.htm>

For Customer Service:

<http://www.kzsoftware.com/contact/index.htm>

Reach us by mail at:

Kaizen Software Solutions, LLC
39962 Cedar Blvd. Ste. 323
Newark, CA 94560-5326