

# **Organize365**

**User guide**

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## Organize365



**General Information**



## Introduction



Organize365 is a Personal Information Manager, intended for use in everyday information and communication tasks. These tasks include:

- Managing your Appointments
- Managing your Tasks
- Managing your Email
- Managing your Address Book

Organize365 also includes several other useful tools, including Instant Messaging (sending messages to other users on your computer network), Desktop Notes ("Sticky Notes"), and a Data Vault which you can use to store data (such as passwords, recipes, directions, ideas, etc).

This software was developed to create a tool that would simplify life, and free up time. Finding a balance between creating an easy to use product, while retaining powerful functionality to offer all the necessary features was the challenge. Strategy realized that a tool like Organize365 should reduce daily stress, not add to it, which is why a lot of time was spent in making sure that features such as backing up of data, sharing of Calendars and Addresses with other users, and so on, are all built-in, robust and easy to configure.

If you are using Organize365 for the first time, it is recommended that you start off by reading the section titled [Getting Started](#).

Thank you for using Organize365 - we hope you will benefit from it and enjoy using it.

## How to contact us

Should you wish to contact us, our contact details are provided below. If you need technical assistance you may wish to refer to the [Frequently Asked Questions](#) section in this document, which contains a list of commonly asked questions.

[www.strategyonline.co.za/organize365](http://www.strategyonline.co.za/organize365)

## How to purchase

You can purchase Organize365 on our website at [www.strategyonline.co.za/organize365](http://www.strategyonline.co.za/organize365).

If you would prefer to purchase Organize365 using a direct transfer, or if you have any questions regarding licensing, please feel free to [contact us](#).

## License Agreement

### IMPORTANT - PLEASE READ CAREFULLY

This End-User License Agreement is a legal agreement between you (either an individual or a single entity) and Hheldersoft CC trading as StrategyOnline.co.za, for the software built by StrategyOnline called "Organize365", which includes computer software and may include associated media, printed materials, and "online" or electronic documentation. By installing, copying, or otherwise using this software you agree to be bound by the terms of this End-User License Agreement.

### SOFTWARE PRODUCT LICENSE

The software is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The software is licensed, not sold. You may not rent, lease, sell, or lend this software to anyone else.

### GRANT OF LICENSE

This program version may be installed on a maximum of two computers, as long as it is ONLY used by the same licensee on either computer: i.e. one installation at home and one installation at the office and used only by the licensee. The simultaneous use of this software by multiple personnel requires additional licenses. Use of this software over an internal network requires separate licenses for each user. The licensee shall not use, copy, rent, lease, sell, modify, decompile, disassemble, reverse engineer, or transfer the licensed software except as provided in this agreement. Any violations to the points laid out in this license agreement may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.

### LIABILITY

We try to keep our software as bug free as possible. However, we cannot guarantee this. Any liability for damage of any sort is hereby denied. In no event shall Hheldersoft, Gary James, StrategyOnline, StrategyOnline.co.za, employees of Hheldersoft CC, employees of Gary James, employees of StrategyOnline.co.za or Dealers of this product be liable for any special, incidental, indirect, or consequential damages whatsoever (including, without limitation, damages for loss of business profits, business interruption, loss of business information, or any other pecuniary loss) arising out of the use of or inability to use this software.

Thank you for your understanding and cooperation.



## Privacy Policy

We will not give out any information that you provide us with to anyone. Organize365 does not send us (or anyone else) any information about you, your computer, your system, or anything else along those lines.

If you have any questions at all regarding our software please [contact us](#).

## Version History

### Version 9.00 (-)

- FEATURE: New documentation.
- DEPRECATED: Removed the Project Management screen.
- DEPRECATED: Removed all license expiry checks.
- DEPRECATED: Removed the "Check PC Time" tool.
- DEPRECATED: Removed the "Countdown Timer" tool.

## Getting Started



## **Installing Organize365**

### **To install Organize365 from our website...**

Go to [www.strategyonline.co.za/organize365](http://www.strategyonline.co.za/organize365), click on "Downloads", and follow the instructions on that page to download the latest installer (EXE).

Run the installer EXE that you downloaded in step 1, and simply follow the installer's instructions.

### **To install Organize365 from a CD-ROM...**

Insert the Organize365 CD into your CD-ROM drive.

The installer program will launch automatically. Simply follow the installer's instructions.

### **If you want to uninstall Organize365...**

Click the Windows "Start" button, then select "Programs", then select "Organize365", then select "Uninstall or Repair", and then click on "Uninstall Organize365".

## Registering Organize365

To enter a registration code into Organize365, simply right-click on the [System Tray Icon](#), select "Help", and then click on "Register Organize365". A screen will then appear where you can enter the registration code. Please use the [Context-Sensitive Help](#) on that screen should you require further assistance.

If your registration code does not seem to work, please click [here](#) for help.

## Start Here!

Once you have installed Organize365 (for more information on how to install Organize365 please click [here](#)), you will see that a new icon appears in your System Tray, as follows:



This icon is called the Organize365 "System Tray Icon". If you right-click on this new icon, a menu will appear, from where you can open your Calendar, Address Book, and so on.

The best way to learn how to use Organize365 is to simply explore the software. Once you have spent a couple of minutes exploring come back to this documentation and skim through it. That will give you a good overall feel for how the software and documentation work.

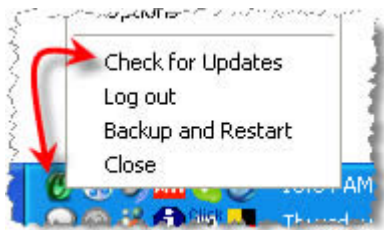
Every screen has a button at the bottom labeled "Help". If you click the "Help" button this document will open to the relevant section. Most screens also have [Context-Sensitive Help](#) which explains what the various controls and fields do.

Please feel free to [contact us](#) if you have any questions or need any assistance.

## Staying up to date

You can download the latest version of Organize365 by visiting our website at [www.strategyonline.co.za/organize365](http://www.strategyonline.co.za/organize365).

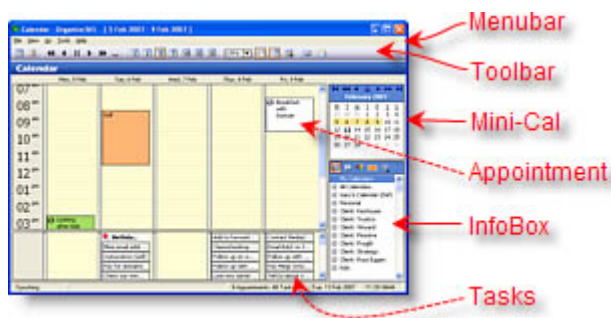
You can also get Organize365 to check for new updates itself by right-clicking on the [System Tray Icon](#), and choosing "Check for Updates"...



This is much easier than manually downloading and installing updates from the the website, and Organize365 will only download the components it needs, so updates won't take as long to download!

## Calendar

To open the Organize365 Calendar, simply right-click on the Organize365 [System Tray Icon](#), and choose "Calendar" from the menu that will appear. Below is a picture showing the Calendar, with the various parts of the screen outlined beneath it.



### Menubar

The "Menubar" contains your menus, which in turn provide you with numerous tools and options.

### Toolbar

While all the features offered to you via the Menubar are useful, some features (such as "Jump to Today", "Go to next week" and so on) are also accessible via your Toolbar. This provides you with a quick way to access features that you will be using frequently. For more information click [here](#).

### MiniCal

The "MiniCal" is short for "Mini Calendar". It is essentially a small calendar (hence the name) which you can use to "control" or "navigate" the larger Calendar. Simply click a date on the MiniCal and the main Calendar will jump to that date. You can also use the directional arrows on the MiniCal to jump forward or backward by a month.

## **Appointments**

The "Appointments" section of the Calendar displays your appointments.

## **InfoBox**

The "InfoBox" (short for "Information Box") is a powerful tool which provides you with a vast amount of information that cannot be displayed on the Calendar. For more information please click [here](#).

## **Tasks**

The "Tasks" section of the Calendar displays your tasks. Think of tasks as your "To Do" list.

## The Calendar Toolbar

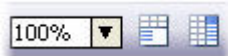
The toolbar on your Calendar contains some of the basic functions that you will use frequently when using your Calendar. Below we outline some of this functionality.



This part of the toolbar (shown above) can be used to adjust the dates displayed in the calendar, by going backward or forward by a day, a week or a month. You can also use these controls to jump to a date which you select from a popup calendar.



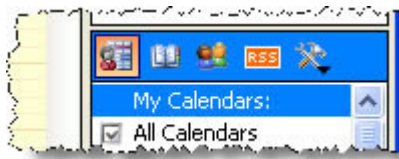
This part of the toolbar (shown above) can be used to adjust the Calendar "View". By that we mean that you can either view a single day, or 5 consecutive days, or 7 consecutive days, or 14 consecutive days, or a full month.



This part of the toolbar (shown above) can be used to change your zoom (so that the calendar items appear larger or smaller), or to hide / unhide the Tasks section of the Calendar, or the MiniCal and InfoBox sections.

## The InfoBox

Over time users have sent us requests along the lines of "When I'm using my calendar I would love to be able to see...". Some of these requests we have built directly into the Calendar (such as birthdays and anniversaries from the Address Book), which other requests we decided to add, but not directly into the calendar itself - instead we came up with a control which we added next to the calendar, and called the 'InfoBox' (short for 'Information Box'). At the top of your InfoBox are five icons, as follows...



You can click on these icons to select what sort of information you want to view in the InfoBox. From left to right, these icons are 'View Calendars', 'View Address Book', 'View Other Users', 'View RSS Feeds', and 'InfoBox Options'. These are discussed separately below.

### 1. Calendars

Clicking this button will show you a list of Calendars, you can then tick which Calendars you want to view. By default you will only have 'one calendar' in Organize365, in which all your Appointments and Tasks will be kept. If you are finding that your Calendar is becoming cluttered you may want to create multiple calendars for yourself, such as 'Work', 'Private', 'Band', or whatever. You can then assign Tasks and Appointments to calendars, so all your work-related Appointments and Tasks will be filed in your 'Work' calendar, and so forth. Once you start doing that, you can then easily view only your Work calendar, or you view multiple calendars at the same time. This can make it much easier to compartmentalize your various Tasks and Appointments, and helps to keep your calendar uncluttered. To create multiple calendars for yourself, simply right-click on the InfoBox (first click on the 'Calendars' button at the top of the InfoBox), and then select 'Configure My Calendars'. A window will appear where you can create new calendars, click the 'Help' button on that window for further assistance.

The Calendars section not only shows your calendars, but it will also list other users who have given you permission to view their calendars! See the section titled [Data-Sharing Overview](#) for more information.

### 2. Address Book

If you click on the second button above the InfoBox you will see a list of all the people in your Address Book. You can right-click on the InfoBox control to insert, change or delete an address. This is simply a quick and convenient way to access your Address Book when working from your Calendar.

### **3. Other Users**

The third button above your InfoBox will show a list of all the other Organize365 users on your network. Right-click on a username will present you with a menu, from where you can select multiple actions, including 'Chat', which will begin a Chat conversation with that user.

### **4. RSS Feeds**

(This section has been removed from Organize365.)

### **4. Options**

If you click on this button a menu will appear presenting options applicable to whatever you are currently doing with the InfoBox control.

## My Pictures



The "My Pictures" area in your Calendar will display any pictures (JPG) located in the your "C:\Program Files\Organize365\My Pictures" directory. It can also display quotes (text) that you can enter from the [Program Options](#) screen. You can select an alternate directory, and you can adjust various settings from the [Program Options](#) screen, if you so choose.

## Keyboard Shortcuts

Sometimes it is simpler and faster to use your keyboard than your mouse.

Below are a number of tasks that can be performed by simply pressing a combination of keys on your keyboard. For instance, if you want to insert a new appointment into your Calendar, you could do this by clicking the "New Appointment" button on your toolbar, or by selecting the "File" menu, then selecting "New", and then "Appointment", or you could simply press "CTRL+SHIFT+A" on your keyboard, as shown in the list below. ("CTRL+SHIFT+A" simply means that you hold down your "CTRL" key, then hold down your "SHIFT" key, and then press the "A" key).

To do this...	Press...	Notes:
Open your Calendar	ALT+CTRL+5	
Create a new Appointment	CTRL+SHIFT+A	
Create a new Task	CTRL+SHIFT+K	
Change to 1 day view	ALT+1	
Change to 5 day view	ALT+5	
Change to week view	ALT+7 or ALT+HYPHEN SIGN	
Change to month view	ALT+EQUAL SIGN	
Go to a specific date	CTRL+G	
Print your Calendar	CTRL+P	
Search your Calendar	CTRL+SHIFT+F	
Open the Address Book	CTRL+SHIFT+B	
Go to today	t	
Go forward one day	+	
Go backward one day	-	
Go back one week	w	As in "week"
Go forward one week	k	As in "week"
Go to 1st day of current month	m	As in "month"
Go to last day of current month	h	As in "month"
Move selected item forward 1 day	ALT+RIGHT ARROW	
Move selected item backward 1 day	ALT+LEFT ARROW	
Move selected item forward 1 week	ALT+SHIFT+RIGHT ARROW	

**How do I...**

## Access my calendar

- Right-click on the [System Tray icon](#).
- Choose "Calendar".

## Create an appointment

### Method 1:

- In your Calendar, right-click where you want the new appointment to appear.
- Choose "New Appointment" from the menu that will appear.

This is the best way to add a new appointment as the appointment date and time will already be entered for you based on where in your calendar you clicked.

### Method 2:

- In your Calendar, select the "File" menu.
- Select "New".
- Click on "Appointment".

### Method 3:

- In your Calendar, click the "New Appointment" button on the toolbar.

## Create a task

### Method 1:

- In your Calendar, right-click where you want the new task to appear.
- Choose "New Task" from the menu that will appear.

This is the best way to add a new task as the task date will already be entered for you based on where in your calendar you clicked.

### Method 2:

- In your Calendar, select the "File" menu.
- Select "New".
- Click on "Task".

### Method 3:

- In your Calendar, click the "New Task" button on the toolbar

## Delete an appointment / task

If the item is part of a recurring series, then you need to click [here](#) to see how to delete it. Otherwise read the section below.

### Method 1:

- Right-click on the appointment / task.
- Select "Delete" from the menu that will appear.

### Method 2:

- Select the appointment / task.
- Press the "Delete" key on the keyboard.

## Move an item to another date

If the item is part of a recurring series, then you need to click [here](#) to see how to edit it. Otherwise read the section below.

### Method 1:

- Edit the appointment / task, and then change the date manually (Click [here](#) for help).

### Method 2:

- Move the appointment / task by dragging it from one date to another using your mouse.

### Method 3:

- Right-click on the appointment / task.
- Select the "Move To" submenu from the menu that will appear.
- Select either "Same time next week" or "Select a Date" depending on what you want to do.

## Move an item to another time

If the item is part of a recurring series, then you need to click [here](#) to see how to edit it. Otherwise read the section below.

### Method 1:

- Edit the appointment / task, and then change the time manually (Click [here](#) for help).

### Method 2:

- Move the appointment / task by dragging it from one time to another using your mouse.

## Edit an appointment / task

If the item is part of a recurring series, then you need to click [here](#) to see how to edit it. Otherwise read the section below.

### Method 1:

- Double-click on the appointment / task.

### Method 2:

- Right-click on the appointment / task.
- Select "Edit" from the menu that will appear.

### Method 3:

- You can also change an appointments start time or end time by simply dragging it with your mouse.

## **Mark an item as "Completed"**

- Right-click on the appointment / task.
- Select "Mark as Complete" from the menu that will appear.

## Use Recurring Items

A recurring item is simply an Appointment or a Task that occurs on a regular basis.

For example, if you have the same meeting every Thursday at 5pm, then you have two options. Either you can [insert a new appointment](#) every week on Thursdays at 5pm, or you can insert one appointment, and then set that appointment to recur every Thursday at that time. Once you have set the appointment as 'recurring' it will appear every week at that time.

### How to create a recurring item

1. Open your Calendar
2. Create a new Appointment or Task (Click [here](#) for help)
3. Click the "Recurrence..." button on your new Appointment / Task.
4. Use the [Context-Sensitive Help](#) on the "Recurrence" screen for more information.

### How to delete a recurring item

To delete a recurring item, simply right-click on the item and choose "Delete". If you delete a recurring item the all the entries for that item will be delete, not just the one that you are clicking on.

### How to edit a recurring item

The first thing you need to ask yourself is "What do I want to edit?".

A) I want to change something on only ONE item.

1. Right-click on the item and choose "Edit".
2. A message will ask you whether you want to edit the occurrence or the series, choose "occurrence".
3. Change the start time, end time, title, etc, then click "OK".

B) I want to change the TIME for ALL items.

1. Right-click on the item and choose "Recurrence".
2. Change the start time and / or the end time, then click "OK".

C) I want to change the TITLE for ALL items.

1. Right-click on the item and choose "Edit".

- 
2. A message will ask you whether you want to edit the occurrence or the series, choose "series".
3. Change the title, label, priority, etc, then click "OK".

## Print a calendar

With Organize365 you can easily print a range of Calendars, including a Weekly calendar, a Monthly calendar, and a Yearly Planner. You can also choose whether you want to print out your Appointments, Tasks, Events, or the Birthdays and Anniversaries from your Address Book (or any combination of these). Furthermore, you can print to a printer, you can preview the printout on your screen, or you can even create a PDF! To print a calendar, simply open your Organize365 [Calendar](#) and choose "Print a Calendar..." from your "File" menu. The screen that will appear is outlined below...

### Print Style:

Select whichever "Style" calendar you want to print.

### Print Range:

Enter the date range that you want to print (from which date, to which date). You can also use this section to specify whether you want to view Appointments, Tasks, All-Day Events, or Birthdays / Anniversaries - or any combination of these items.

### Target:

Here you can select from a number of "Targets", including the default printer, or PDF!

### Other Options:

The options displayed here will vary depending on what you selected above in the "Target" section. If you select to print to a printer, then you will be presented with:

- "Preview before printing" - This opens a "Print Preview" screen from where you can either print the report, or you can cancel.

If you select "PDF" as the Target (see above), then you be presented with these options:

- "Open the file after we have generated it" - This will cause the PDF to open (using Adobe Acrobat Reader if it is installed on your computer) after it has been saved. Adobe Acrobat Reader is a free download (built by Adobe - not by us, we take no responsibility or credit for how it works) and can be downloaded from [www.adobe.com](http://www.adobe.com).
- "Open the folder we are saving into once generated" - This will open the folder into which the PDF was generated (using Windows Explorer).

- "Filename" - Organize365 will generate the report, and then save it to your hard drive as a PDF document. Enter the file name for that PDF document here, or use the lookup button to select a PDF file (which will be overwritten).

Once you have selected the options that you want to use, simply press the "Print" button, or the "Generate" button.

## Search my calendars

- Select the Calendar's "Tools" menu.
- Click on "Find".

We will be adding more functionality to the Search Tool in the future, and will update this documentation at that time. For now the screen is self-explanatory, and contains [Context-Sensitive Help](#) which explains what the various fields do. If anything is not clear please [let us know](#).

## Share my calendars

This topic is discussed in detail [here](#).

## **Monitor who has accessed my calendars**

( This section is still being developed and has not yet been documented. )

## Set up a meeting

Organize365 makes it easy to set up meetings with other users (assuming they are also using Organize365). Below are the steps that you would need to take to set up a meeting using Organize365.

Firstly, someone needs to actually take charge of setting up the meeting, and inviting users to attend it. This person is called the "Organizer". The Organizer simply opens their Calendar, and creates a new appointment. Once they have created an appointment, they can then invite other users to attend that appointment. To invite others you simply right-click on an appointment, and choose "Invite..." from the menu that will appear. A new window will then open, from where you can select the users that you wish to invite to attend the meeting. Simply select whoever you want to invite, and click "OK". They will then be invited to attend.

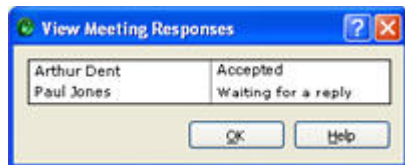
When a user receives an invitation to attend a meeting, that meeting (appointment) will simply appear in their calendar. It will flash with a red background to indicate that it is something that needs their attention. You will see that meetings differ from regular appointments also in that they have a small icon in the upper left corner, as follows:



The recipients of meeting requests then simply right-click on those requests, and select a response from the menu that will appear (shown above). Responses can be either "Accept invitation", "Decline invitation", or "Request alternate time". If you select "Accept invitation", the meeting will remain in your calendar, however if you select either "Decline invitation" or "Request alternate time" the meeting will disappear from your calendar. Once you have selected a response the Organizer will be notified accordingly. If you point your mouse at the meeting request a tooltip will appear, which will display (among other things) the name of the person who sent the invitation.

The Organizer (not the recipients) can at any time right-click on the meeting, and select either "Invite More Users" to invite more users <g>; or he can select "Cancel Meeting" to cancel the meeting, in which case all meetings requests that other users have received

will automatically be removed from their calendars (marked as Cancelled, not deleted); or he can select "View Status" to see who has replied to the invitation, for example:



It's as easy as that! If you have any ideas for how we can improve this functionality please [let us know](#).

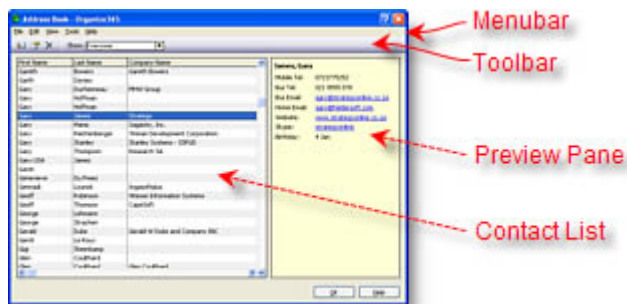
**PLEASE NOTE:** Because Organize365 uses its own peer-to-peer replication engine to share data across a network (as opposed to a server), any changes that you make to your own calendar, or any meeting requests that you send out will not appear on other users calendars immediately. For the shortest possible delay, all users should tick the "Automatically synchronize every X minutes" checkbox in the "Data Sharing" section on the "Program Options" screen, and should set Organize365 to automatically synchronize every 1 minute.

## **Use Web-Feeds**

This feature is no longer available.

## Address Book

To open the Organize365 Address Book, simply right-click on the Organize365 [System Tray Icon](#), and choose "Address Book" from the menu that will appear. Below is a picture showing the Address Book, with the various parts of the screen outlined beneath it.



### Toolbar:

We will be adding more functionality to the toolbar in future versions. For now it contains a droplist, which you can use to select which Contact Group you want to view. For more information on the Toolbar, click [here](#).

### Contact List:

This list displays the addresses in your Address Book. Clicking on a column name ("First Name", "Last Name" or "Company Name" will resort the list in that order). Use the "Insert", "Change" and "Delete" buttons below the list to add / edit / delete addresses from your Address Book.

### Preview Pane:

If you select an address in your Contact List, more comprehensive details for that address will be displayed in your Preview Pane. You can click or right-click on various items in the Preview Pane to start an email to the selected person, open their webpage, etc.

More information is available by using the [Context-Sensitive Help](#) feature.



## The Address Book Toolbar

At this stage the Toolbar contains a single droplist, which lists any Contact Groups that you have set up, and can be used to limit the addresses displayed to those that belong to a certain Contact Group. For more information on Contact Groups click [here](#).

## Keyboard Shortcuts

Sometimes it is simpler and faster to use your keyboard than your mouse.

Below are a number of tasks that can be performed by simply pressing a combination of keys on your keyboard. For instance, if you want to create a new Contact, you could do this by clicking on "New Contact" in the "File" menu, or you could simply press "CTRL+SHIFT+C" on your keyboard, as shown in the list below. ("CTRL+SHIFT+C" simply means that you hold down your "CTRL" key, then hold down your "SHIFT" key, and then press the "C" key).

To do this...	Press...
Create a new Contact	CTRL+SHIFT+C
Print your Address Book	CTRL+P
Search your Address Book	CTRL+SHIFT+F

**How do I...**

## Access the Address Book

- Right-click on the [System Tray Icon](#).
- Click on "Address Book".

## Add a new address

### Method 1:

- Right-click on the Organize365 [System Tray Icon](#).
- Open the Address Book.
- Click the 'Insert' button.

### Method 2:

- From your Calendar, click on the "Address Book" icon at the top of the [InfoBox](#).
- Right-click on the InfoBox and select "Insert an Address".

## Edit an address

- Open the Address Book (click [here](#) if you need help with that).
- Select the Address you wish to edit.
- Click the 'Change' button.

## Delete an address

- Open the Address Book (click [here](#) if you need help with that).
- Select the Address you wish to delete.
- Click the "Delete" button.

## Use Contact Groups

As you add more and more addresses into your Address Book you may find that it becomes harder to keep track of addresses. To help alleviate this problem, we have built a feature called 'Contact Groups', which lets you view only a subset of the addresses in your Address Book.

For example, you could create Contact Groups called 'Family', 'Work Colleagues', 'Band Members', and so on. You can categorize your addresses according to these groups. Once this is done, you can either view all the addresses in your Address Book, or you can view only those addresses that belong to a certain Contact Group ('Band Members' for example).

With Organize365 you can create as many Contact Groups as you like, and you can assign addresses to as many Contact Groups as you like! In other words one address can belong to more than one Contact Group.

To create new Contact Groups, simply open your Address Book, select the 'Groups' menu, and then click on 'Edit Groups'. A new screen will appear with buttons labeled 'Insert', 'Change' and 'Delete'. You can use that screen to insert new Contact Groups, edit (change) Contact Groups, or delete Contact Groups. This screen has [Context-Sensitive Help](#) in case you get stuck.

Once you have created Contact Groups, you can then assign your addresses to these groups. To do this simply edit an address (click [here](#) if you don't know how to do that), then select the 'Groups' section - from here you can simply tick whichever Contact Groups you want the address to belong to.

Once you have created Contact Groups and have assigned your addresses to whichever groups they belong in, you can then use the 'Group' droplist on your Address Book's [ToolBar](#) to determine whether you view all your addresses, or only those addresses that belong to a certain Contact Group.

## Print Addresses

With Organize365 you can easily print Addresses from your Address Book. You can print to a printer, you can preview the printout on your screen, or you can even create a PDF! To print Addresses, simply open your Organize365 [Address Book](#), and choose "Print Addresses..." from your "File" menu. The screen that will appear is outlined below...

### Print Style:

Select whichever "Style" calendar you want to print. At this time there is only one style you can choose, called "Table Style". More styles will follow in future versions.

### Print Range:

From this droplist you can either choose to include all the Addresses in your Address Book (by choosing "Everyone"), or you can select a [Group](#) of Addresses.

### Target:

Here you can select from a number of "Targets", including the default printer, or PDF!

### Other Options:

The options displayed here will vary depending on what you selected above in the "Target" section. If you select to print to a printer, then you will be presented with:

- "Preview before printing" - This opens a "Print Preview" screen from where you can either print the report, or you can cancel.

If you select "PDF" as the Target (see above), then you be presented with these options:

- "Open the file after we have generated it" - This will cause the PDF to open (using Adobe Acrobat Reader if it is installed on your computer) after it has been saved. Adobe Acrobat Reader is a free download (built by Adobe - not by us, we take no responsibility or credit for how it works) and can be downloaded from [www.adobe.com](http://www.adobe.com).
- "Open the folder we are saving into once generated" - This will open the folder into which the PDF was generated (using Windows Explorer).
- "Filename" - Organize365 will generate the report, and then save it to your hard drive as a PDF document. Enter the file name for that PDF document here, or use the lookup button to select a PDF file (which will be overwritten).

Once you have selected the options that you want to use, simply press the "Print" button, or the "Generate" button.

## **Import / Export Addresses**

To export your Address Book to other file formats, simply do the following...

- Open the Address Book.
- Select the "File" menu.
- Click on "Import and Export".

At this stage you cannot yet import data into Organize365 (that feature is coming soon), and you can only export data to CSV format (which you can then open using Notepad or Excel). We will be expanding this feature in the future.

## Search my contacts

- Select the "Tools" menu.
- Click on "Find".

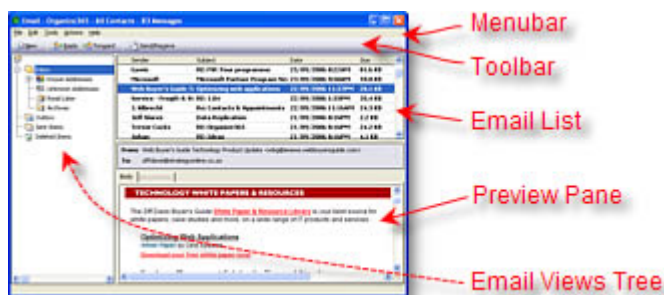
For more information please see the section in the documentation titled [How do I search my Calendar](#), which makes use of the same tool.

## Email

To open the Organize365 Email client, simply right-click on the Organize365 [System Tray Icon](#), and choose "Email" from the menu that will appear.

The Organize365 email documentation is split into two sections, this section (covering the email client where you receive and read emails), as well as a section on the [Email Editor](#), which covers how to create and send emails.

Below is a picture showing the Email client, with the various parts of the screen outlined beneath it. The best way to learn how to use Organize365's email functionality is to take a look at the section in the documentation titled "[How do I](#)" which covers frequently asked questions.



### Toolbar:

The Toolbar contains buttons that will enable you to quickly create a New Email, Reply to an email, Forward an email, and Send & Receive. For more information on the toolbar please click [here](#).

### Email Views Tree:

Unlike some email clients which use email folders, Organize365 uses "Views". This is explained in more detail [here](#).

### Email List:

Use the Mail Views Tree to determine which emails are listed here, then select an email here to preview it in the Mail Preview pane.

**Preview Pane:**

The currently selected email (in the Email List above) is displayed in the Preview Pane.

## The Email Toolbar

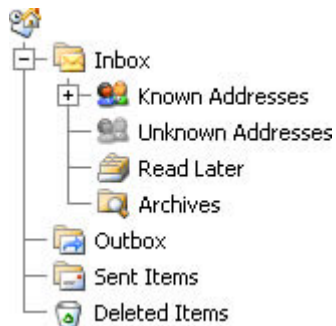
We have deliberately tried to keep the Email Client's toolbar as simple as possible, and for this reason have only added the following buttons:

- "New" - Create a new email message.
- "Reply" - Reply to the currently selected email.
- "Forward" - Forward the currently selected email.
- "Send / Receive" - Download new email messages.

## The Email-Views Tree

Most email programs use "Mail Folders", where different emails are stored in different folders.

Organize365 uses a different approach to email. We use "Mail Views", where all your email is stored in one folder, but you can use "Mail Views" to limit which emails you want to work with.



For example, if you click on "Inbox" in the Email-Views tree, Organize365 will then list all the emails that you have received. In the "Inbox" View you will notice that there are subfolders (sub-Views) such as "Known Addresses", "Unknown Addresses", "Read Later", and "Archives". Clicking on one of these views will display only the emails that match those criteria. There are also Views called "Outbox", "Sent Items", and "Deleted Items".

## Junk Email

Spam is a serious problem. Organize365 has several mechanisms in place to help alleviate the problem of spam.

Firstly, the Email Tree contains a node called "Known Addresses". Anyone who is in your Address Book is considered to be a "Known Address". By simply clicking on the "Known Addresses" node you will be able to view all emails which you have received from people who you know. These are unlikely to be spam, and are usually the most important emails to respond to.

Once you have processed email from your "Known Addresses", you can then click on the "Unknown Addresses" node. This is where you are likely to find some spam messages. Any mail in this folder which is not spam should be added to your "Known Addresses" by simply right-clicking on the email and choosing "Add to Address Book". Once you have done that, then any emails received from that person in the future will be displayed in your "Known Addresses" section.

If you find any emails in your "Unknown Addresses" section which are spam or junk emails, you can either delete them, or you can mark them as "Junk". To mark an email as "Junk", you can either right-click on the email and select "Junk Email", or you can use the CTRL+J [keyboard shortcut](#).

When you mark email as "Junk" it will be moved to your "Junk Email" section. Organize365 will also then watch for any other emails received from the same address in the future, and will automatically move them to your "Junk Email" folder for you!

By using the techniques described here you will gradually teach Organize365 who your "Known Addresses" are, and Organize365 will start sorting your email for you into "Known Addresses", "Unknown Addresses" and "Junk".

## Keyboard Shortcuts

Sometimes it is simpler and faster to use your keyboard than your mouse.

Below are a number of tasks that can be performed by simply pressing a combination of keys on your keyboard. For instance, if you want to create a new email message, you could do this by clicking the "New Email" button on your toolbar, or you could simply press "CTRL+N" on your keyboard, as shown in the list below. ("CTRL+N" simply means that you hold down your "CTRL" key, then press the "N" key).

To do this...	Press...
Create a new message	CTRL+N
Reply to a message	CTRL+R
Forward an email message	CTRL+F
Mark a message as read	CTRL+Q
Delete an email message	CTRL+D
Mark a message as Junk Mail	CTRL+J
Send and Receive	F9

**How do I...**

## Set up an email account

Before you can use Organize365 to send and receive email you will need to set up an email account. Typically your service provider will provide you with information about your email account, such as a username and password. You need to enter that information into Organize365 by following these steps:

- Open the [Email](#) screen.
- Click on "Email Accounts" in the "Tools" menu.
- Click the "Insert" button to add a new email account.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

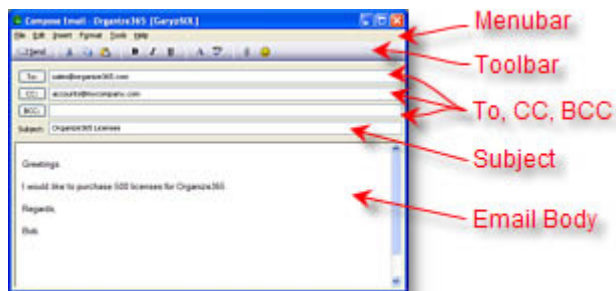
## Receive email

- Open the [Email](#) screen.
- Click on the "Send / Receive" button in the toolbar.

Once you click the "Send / Receive" button you will be able to monitor the progress of emails being downloaded by looking at the information displayed in your status bar.

## The Email Editor

When you create a new email, or reply to or forward an email that you have received, you will need to use the Email Editor screen.



### Toolbar:

The Toolbar contains the a number of buttons. Simply point your mouse at any of the buttons and a tooltip will appear showing you what that particular button does.

### To:

Enter the email address that you want to send your email to here. You can enter a single email address, or you can enter multiple email addresses as long as you separate the addresses with a semi-colon. You can also click on the "To" button to select addresses from your Address Book.

### CC:

If you want to CC the email you can enter those addresses here. You can enter a single email address, or you can enter multiple email addresses as long as you separate the addresses with a semi-colon. You can also click on the "CC" button to select addresses from your Address Book.

### BCC:

If you want to BCC the email you can enter those addresses here. You can enter a single email address, or you can enter multiple email addresses as long as you separate the addresses with a semi-colon. You can also click on the "BCC" button to select addresses from your Address Book.

**Subject:**

Enter the email subject here.

**Email Body:**

Compose your email here.

## Keyboard Shortcuts

Sometimes it is simpler and faster to use your keyboard than your mouse.

Below are a number of tasks that can be performed by simply pressing a combination of keys on your keyboard. For instance, if you want to send an email, you could do this by clicking the "Send" button on your toolbar, or you could simply press "ALT+S" on your keyboard, as shown in the list below. ("ALT+S" simply means that you hold down your "ALT" key, then press the "S" key).

To do this...	Press...
Send a message	ALT+S
Print a message	CTRL+P
Delete selected message	CTRL+D
Mark selected message as "read"	CTRL+Q
Mark selected message as "read later"	CTRL+L

**How do I...**

## Send an email

To create and send a basic email, follow these steps:

From the Email screen, click on the "File" menu, then click on "New Mail Message". This will cause the Email Editor screen to appear.

In the "To" field, enter the person's email address. This address is where your email will be sent to. For example, bob@aol.com.

Enter a title for your email in the "Subject" field. This can be something like "Hi Bob", "Feel like a fishing trip", or something like that.

Type your email message in the large field immediately below the "Subject" field.

When you are ready to send the email, simply click the "File" menu, then click on "Send".

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Send an attachment

In the Email Editor, simply click on the "Insert" menu, then click on "Add Attachment".

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Insert a picture

There are two ways in which you can send pictures with emails. Either you can simply send the picture file as an [external attachment](#), or you can actually embed the picture in the email body, as if it were part of the email itself.

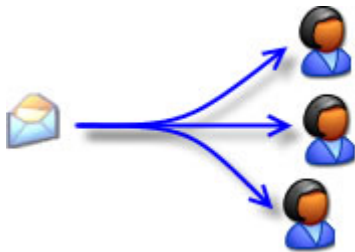
To embed a picture into your email, simply click on the "Insert" menu, then click on "Insert Picture".

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Send a newsletter

Usually when you send one email to more than one person, then each person who receives the email can see all the email addresses of everyone else that you sent the email to. Even if you use the "BCC" field, it is still quite easy for someone to look at the underlying email properties and see who you sent it to.

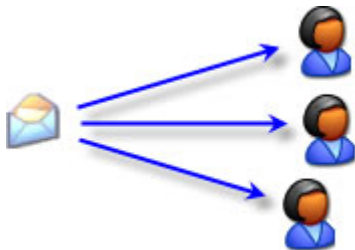
What actually happens is this...



In other words we are sending one email to three people. They will all receive the same email, and will all be able to see all the email addresses that you sent the email to.

Sometimes you may not want everyone to see all the addresses that you sent the email to. For example, let's say that you were sending out an email newsletter to your clients. You wouldn't want your clients to be able to see who else received the email!

Organize365 provides a feature called "Newsletter Mode" which solves this problem for you. Newsletter Mode allows you to create one email message, and then send it to multiple people, where each person receives a unique copy of the email, sent to only their email address. In effect this is the same as if you physically sent a unique email to each person. Or to use a picture, Newsletter Mode works like this..



In other words you are actually sending the email three times, not once. By using the Newsletter Mode feature you can make Organize365 do this for you automatically! You only need to type and send one email, and Organize365 will then send separate copies of that email to each person. This means that each person receiving the email will only see their email address on the email, and they won't be able to see who else you sent it to!

## Email Personalization

What if you wanted to send one email to 10 different people, but you wanted each email to start with the person's name? For example, "Dear George", "Dear Bob", etc.

With Organize365 this is easy to do! We have created a feature whereby you can insert "fields" into the email, like [FIRSTNAME], [LASTNAME], etc. So by writing "Dear [FIRSTNAME]" Organize365 will intelligently add each persons first name directly into the email. So all your recipients will feel as though you took the time to write a unique email just for them!

## How do I do this?

To send an email in Newsletter Mode proceed as follows..

1. From the Email screen, click on the "New" button on the toolbar, as if you were creating a regular email.
2. Enter the addresses of the people that you want to send the email to in the "To" field. Separate the email addresses by using a semi-colon, for example "gary@home.com; fred@work.com; mary@google.com".
3. Enter a subject line for your email.

So far we have not done anything differently to if we were sending a regular email.

Now you need to enable Newsletter Mode. Click on the "Tools" menu and click on "Enable Newsletter Mode". Two things will happen. First, you will see the window's titlebar changes from "Compose Email" to "Compose Newsletter". Second, you will see a new menu appears called "Fields". You are now in Newsletter Mode!

You can now type your email message. If you want to personalize the email, you can do this by using the "Fields" menu. For example...

1. In the email, type "Dear ".

2. From the "Fields" menu, click on "First Name". You will see that your email now reads "Dear [%FIRSTNAME%]".

When you send the email Organize365 will substitute "[%FIRSTNAME%]" for each recipient's first name! Easy as that...

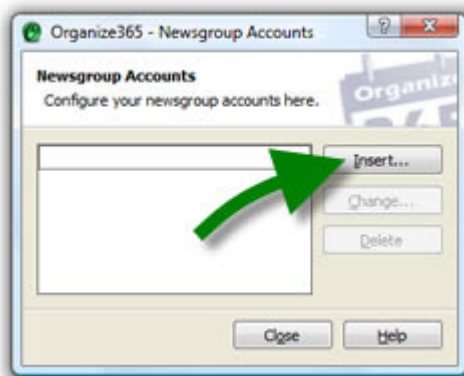
## **Newsgroups**

**How do I...**

## Set up a newsgroup account

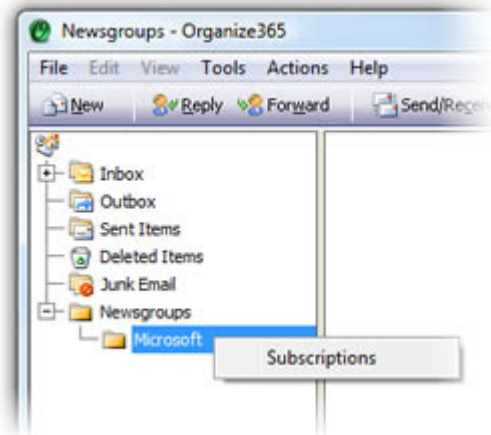
To subscribe to a newsgroup, proceed as follows...

Open the [Email](#) screen, click on the "Tools" menu, then click on "Newsgroup Accounts". Click the "Insert" button to add a new Newsgroup Account.

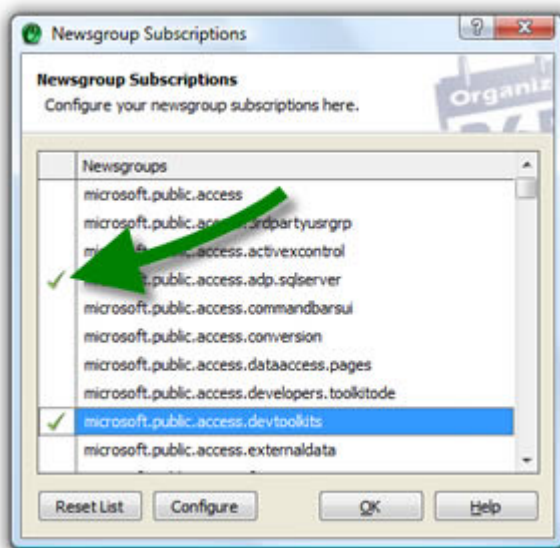


The "New Account" dialog screen will appear. Enter all of the required fields. Use the screen's [Context-Sensitive Help](#) feature if you need assistance with any of the fields.

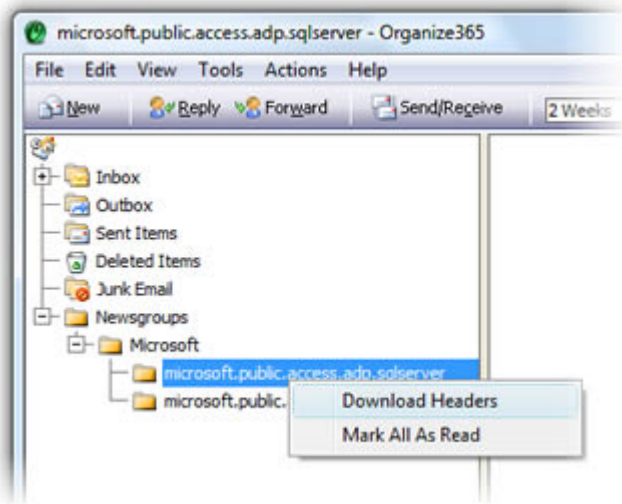
Once you have created a new Newsgroup Account, you can then subscribe to its various newsgroup items. Simply right-click on your Newsgroup Account, and choose "Subscriptions" from the popup menu, as shown here...



That in turn opens the Newsgroup Subscriptions dialog, which will download and list the available newsgroup items from the newsgroup server. Simply select the items that you wish to subscribe to.



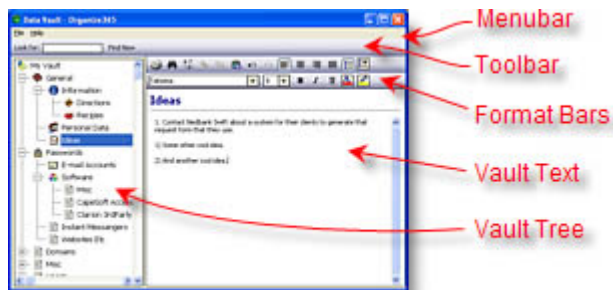
Once you have subscribed to one or more items, they will then appear in the tree, as shown below. Simply right-click on any item and choose "Download Headers" to view its messages.



## Data Vault

The Organize365 Data Vault is a place where you can store any important information. Examples of what you can store in the Vault could be passwords, directions, notes, bank account details, etc. You can create categories for your data, so what you store in here is up to you!

To open the Organize365 Data Vault, simply right-click on the Organize365 [System Tray Icon](#), and choose "Data Vault" from the menu that will appear. Below is a picture showing the Data Vault, with the various parts of the screen outlined beneath it.



### Menubar:

The "Menubar" contains your menus, which in turn provide you with numerous tools and options.

### Toolbar:

The toolbar provides "search" functionality, which you can use to search through all the data stored in your Vault.

### Format Bars:

The Format Bars provide typical formatting functionality for when you type data into the Vault, such as "Bold", "Underline", "Font Color", etc.

### Vault Text:

Once you have selected where you want to store the data in the Vault (using the Vault Tree), you can type the text that you want to store here.

### **Vault Tree:**

The Data Vault can consist of as many "pages" and "subpages" as you like. You can use the Vault Tree to create new pages, arrange your pages into folders, and select which page you want to view or edit.

## **Keyboard Shortcuts**

This section has not yet been documented.

**How do I...**

## Print data

You can easily print the data stored in your Vault. You can either print to a printer, or you can preview the printout on your screen, or you can even create a PDF! To print the data in your Vault, simply open your Organize365 [Vault](#) and choose "Print..." from your "File" menu. The screen that will appear is outlined below...

### **Print Style:**

Select whichever "Style" calendar you want to print.

### **Print Range:**

You can currently only print all the data in your Vault. In future versions of Organize365 you will have more options in this droplist.

### **Target:**

Here you can select from a number of "Targets", including the default printer, or PDF!

### **Other Options:**

The options displayed here will vary depending on what you selected above in the "Target" section. If you select to print to a printer, then you will be presented with:

- "Preview before printing" - This opens a "Print Preview" screen from where you can either print the report, or you can cancel.

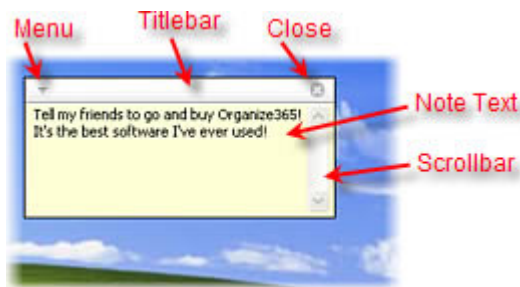
If you select "PDF" as the Target (see above), then you be presented with these options:

- "Open the file after we have generated it" - This will cause the PDF to open (using Adobe Acrobat Reader if it is installed on your computer) after it has been saved. Adobe Acrobat Reader is a free download (built by Adobe - not by us, we take no responsibility or credit for how it works) and can be downloaded from [www.adobe.com](http://www.adobe.com).
- "Open the folder we are saving into once generated" - This will open the folder into which the PDF was generated (using Windows Explorer).
- "Filename" - Organize365 will generate the report, and then save it to your hard drive as a PDF document. Enter the file name for that PDF document here, or use the lookup button to select a PDF file (which will be overwritten).

Once you have selected the options that you want to use, simply press the "Print" button, or the "Generate" button.

## Desktop Notes

Organize365 has a feature called "Desktop Notes" that lets you create virtual "Sticky Notes" on your computer's desktop. To create a new Desktop Note, simply right-click on the Organize365 [System Tray Icon](#), and choose "New Desktop Note" from the menu that will appear. Below is a picture showing a Desktop Note, with the various parts outlined beneath it.



### Menu:

Click the little grey, downward-pointing arrow on the left of the Title Bar and a menu will appear, presenting you with a number of options (including "Always on Top", "Send to Another User", "Send to Calendar", and "Delete").

### Titlebar:

You can move the Desktop Note by simply dragging its Title Bar with your mouse - in the same way that you would move any normal window.

### Close:

Click the Close button to close the Desktop Note. This does not delete the Note, it simply closes it. The next time you start Organize365 the note will reappear. You can also reopen any notes that you have closed by right-clicking on the [System Tray Icon](#), and selecting "Open Closed Notes" from the "Misc" submenu. If you want to delete a note you can do that from the Menu (see above).

### Note Text:

This is where you type whatever you want to store in your note.

### **Scrollbar:**

If your Desktop Note is too small to display all the text you have entered into it, then you can use the scrollbar to scroll up or down. You can also resize your Desktop Notes by using your mouse.

Desktop Notes by default will appear on on your Desktop. If you open any other program you will not be able to see your Desktop Notes. You can make a Desktop Note "float on top" of any other programs so that it is always visible if you like - do this by ticking "Always on Top" from the Menu (see picture above).

**How do I...**

## Create a desktop note

Right-click on the Organize365 [System Tray Icon](#), and click on 'New Desktop Note'. A new Desktop Note will appear in the middle of your Windows' desktop.

## Delete a desktop note

To delete a Desktop Note, simply click on the Desktop Note's Menu, and then choose 'Delete'. Click [here](#) if you need help locating the Desktop Note Menu.

NOTE: You can either 'Delete', or 'Close' a Desktop Note. Closing a Desktop Note is not the same as deleting a Desktop Note. When you delete a Desktop Note it is deleted. When you close a Desktop Note you can no longer see it on your desktop, but it is not deleted. The next time you start Organize365 any notes that were previously closed will reappear. You can also make closed notes reappear by right-clicking on the [System Tray Icon](#), selecting the 'Miscellaneous' menu, and then clicking on 'Open closed notes'.

For more information on how to close a Desktop Note, please click [here](#).

## Close a desktop note

To close a Desktop Note, simply click on the Desktop Note's Menu, and then choose 'Close'. Click [here](#) if you need help locating the Desktop Note Menu.

NOTE: Closing a Desktop Note is not the same as deleting a Desktop Note. When you delete a Desktop Note it is deleted. When you close a Desktop Note you can no longer see it on your desktop, but it is not deleted. The next time you start Organize365 any notes that were previously closed will reappear. You can also make closed notes reappear by right-clicking on the [System Tray Icon](#), selecting the 'Miscellaneous' menu, and then clicking on 'Open closed notes'.

For more information on how to delete a Desktop Note, please click [here](#).

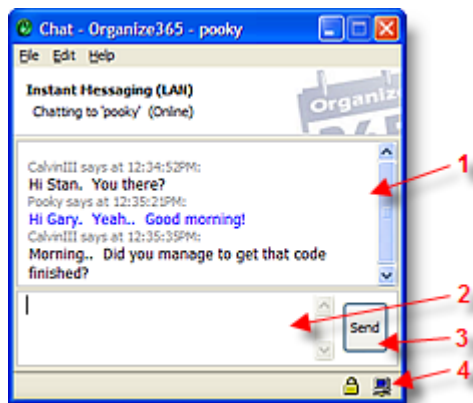
## Enter text into a desktop note

Simply click on the Note Text Area of the Desktop Note window (click [here](#) if you need do not know where that is), and then start typing. Use your Enter key to create new paragraphs.

## Instant Messaging

Organize365 has an Instant Messaging tool to send messages to other users who are also using Organize365.

To start chatting with another Organize365 user, simply right-click on the Organize365 [System Tray Icon](#), and choose "New Chat". You will then be presented with a list of all the other users - simply tick which user you want to chat with, and click 'OK'.



### 1. Conversation Area:

The conversation area displays all the messages that you have sent to the person you are chatting with, as well as all the messages that you have received.

### 2. Message Area:

When you want to send a message to the person you are chatting with, simply enter that message here and then click the 'Send' button. Your message will then be sent and will appear in the Conversation Area (see above).

### 3. Send Button:

See the section above titled 'Message Area'.

### 4. Status Bar:

The Status Bar displays useful information. It also displays two icons, one indicating whether the conversation you are having is secure (meaning that no one else can 'listen in' on your conversation), and the other indicating whether you are currently chatting across your LAN (local network) or the internet.

## Keyboard Shortcuts

This section has not yet been documented.

**How do I...**

## Chat with another user

- Right-click on the Organize365 [System Tray Icon](#).
- Click on "New Chat".
- Tick the user that you want to chat with, and then click 'OK'.

A new Chat window will appear, from where you can chat with the user that you selected (above). For more information on the Chat window and how it works, please click [here](#).

## Miscellaneous



## Using the Report Previewer

Organize365 incorporates numerous reports. You can print your Address Book, your Data Vault, and your Calendar, using a wide range of options.

If you choose to preview a report before printing it, then the Organize365 Report Previewer will open. This screen can be used to preview your report, but it also includes several useful additional features.

For example, from the "File" menu you can choose to either print the report that you are currently previewing, or you can choose to save the report as a PDF file, or if you have Microsoft Fax installed you can choose to fax the report!

Other buttons on the Report Previewer's toolbar enable you to zoom into and out of the report, to navigate from one page of the report to another, and even to search the report! Simply point your mouse at any toolbar item and a tooltip will appear, explaining how the item works.

## Sharing your data with other users

You can easily share your Organize365 data (calendars, addresses, etc) with other users on your network!

Unlike other Personal Information Managers, Organize365 does not use a server. We decided that we didn't like the idea of using a server because it means that someone has to set up that server; you usually have to pay extra for the server's hardware and software; if something goes wrong with the server it messes up everything for everyone; and you can only see your data when you are connected to the server.

Instead, Organize365 has a built-in "Replication Engine". The way this works is really simple, yet incredibly powerful. Let's say that Gary, Fred, and Bob are all connected to the same office network, like this...



Let's say that Gary creates a new appointment in Organize365. As soon as he creates the appointment, Organize365 intelligently scans the network for anybody else who is using Organize365. If it finds other users it will automatically tell them about the new appointment, and everyone will automatically see that appointment on their computers!



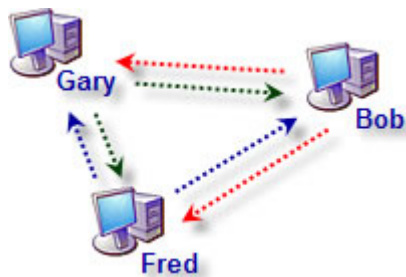
Okay, but what if Bob is away or not connected to the network when Gary creates his new appointment? What then? How will Bob know about Gary's appointment?

Well, Gary's computer will still tell Fred's computer immediately, and it will tell Bob's computer about the appointment the next time Bob is on the network!

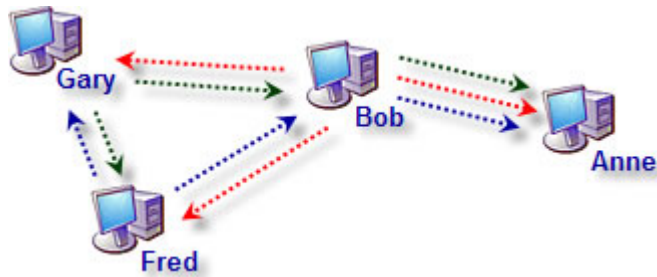
Okay, but what if when Bob comes back Gary is no longer on the network?

Well, Gary's computer will tell Fred's computer about the appointment immediately, so when Bob comes back Fred's computer will tell Bob's computer about Gary's appointment!! How awesome is that!!? Another useful side-effect of this design is that when Bob is away from the network he still has full access to all of his data! So you can easily run Organize365 on a laptop and take the laptop off-site; every time you reconnect to the network Organize365 will automatically tell everyone else what changes you made to your data, and it will update itself with any changes that other users made while you were away!!

You might need to get a cup of coffee before looking at the next picture because this is just so fantastic... In effect, here's what Organize365 does over your network to ensure that all data is replicated to everyone as quickly as possible, and to ensure that all data gets to everyone even if they are away...



This means that if a new user joins the network (we'll call her "Anne"), then any of the computers can tell her about everyone's data, like this...



Impressed? Good.

Okay. Now that we've explained how it works, below are some common questions we get asked...

### **I want to share my Address Book and / or my Calendar. Where do I begin?**

In the 'Program Options' window, select the '[Data-Sharing](#)' tab. Simply tick "Enable Organize365 data-sharing" and you're done!

### **Can I set which users on my network are allowed to see my appointments?**

Because we understand that people's information is private, we have designed Organize365 not to share information unless you want it to. By default Organize365 will not share any of your data (Address Book or Calendar). If you want to share your data you need to open the Program Options screen, select the '[Data-Sharing](#)' tab, and manually tick 'Enable Organize365 data-sharing'.

You have further control when sharing your calendar in that you can also set 'User Permissions', so that certain users can have read-only access, full access, or no access. To configure which users you want to share your data with, simply open the Program Options screen, select the '[Data-Sharing](#)' tab, then click on the button titled "Configure Other Users".

### **What if I only want to share some of my addresses with other users?**

Each address in your Address Book has a checkbox called "Private". By default this is not ticked, meaning that all the addresses in your Address Book are not private, and if you enable data-sharing all your addresses will be shared. If you do not want to share certain addresses in your Address Book, simply tick the "private" checkbox for those addresses. Easy as that! There is a similar "private" checkbox for your tasks and your appointments.

If you mark an Address as Private and that address has already been shared with other users, any changes you make to that address from that time onward will not be shared. If you mark an Appointment or a Task as Private after you have already shared it with other users it will be removed from their calendars. If you create a new Contact, Appointment, or Task, and mark it as Private immediately, it will not be shared with other users.

**If I share my data with other users on my network, what happens when I try to use Organize365 if I am not connected to the network?**

That's the beauty of this design. Your data is still stored on your computer, so if you are not connected to the network you can still see and change all of your data, even if you're not connected to the network! Simply continue working, and the next time you are connected to the network your changes will be sent to the other users and you will receive any changes they made since you unplugged.

## Logging in / out

Because you will be storing personal information in Organize365, we have provided a number of mechanisms to protect your confidential information. In some parts of the program we encrypt your data, in some places we encrypt the communication between multiple copies of Organize365 on a network, or communication over the internet. Another mechanism that we have built into Organize365 is the ability to Log Out of Organize365.

To Log Out of Organize365, simply right-click on the Organize365 [System Tray Icon](#), and choose "Log Out". You will then be "Logged Out". You will then need to "Log In" before you can use Organize365 again. To Log In, you simply right-click on the Organize365 [System Tray Icon](#), and choose "Log In". Easy as that. You can also set a password, so that when you Log Out you will be asked to enter your password before you can Log In again. To set a password, simply open the [Program Options](#) screen, select "General" from the "Options List", and then enter a password in the field titled "Login Password".

## Program Options

As with any software, Organize365 can be configured using a "Program Options" screen. This screen can be accessed by right-clicking on the [System Tray Icon](#), and selecting "Options".

The Program Options screen is broken up into categories. On the left of the screen you will see a list of these categories, such as "General" (for general options), "Interface" (for options pertaining to the user interface), and so forth. Simply select an item from this list (either by using your mouse, or by using CTRL+TAB on your keyboard) and settings pertaining to that category will appear on the right hand side of the Program Options window.

The Program Options screen has [Context-Sensitive Help](#) which you can use to find out more information about any setting. If you need more information, it can be found by selecting the applicable page from the list below:

## General

The 'General Options' screen lets you set up general program options.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Interface

The 'Interface Options' screen lets you configure how Organize365 looks. It also lets you set how dates and times should appear (for example day/month/year or month/day/year), and disable the splash screen and so on.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Projects

This section has not yet been documented.

## Email

The 'Email Options' screen lets you configure your Organize365 email settings. Please use this screen's [Context-Sensitive Help](#) for more information, or see the section titled "How do I set up an email account" in the [FAQs](#).

## Calendar

Organize365 has several different sections in the 'Program Options' screen for setting how the Calendar works. The 'main' or 'General' Calendar Settings section lets you set options such as what day of the week you regard as being the 'first day', how long default reminders should be and so on.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Calendar Labels

Organize365 has several different sections in the 'Program Options' screen for setting how the Calendar works. The 'Calendar Labels Options' section is used for assigning names to Calendar Labels. Calendar Labels can be used to categorize your appointments and tasks. Appointments and tasks that are assigned a label will appear in a specific color, so that you can easily identify them as belonging to a certain category.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Calendar Reminders

Organize365 has several different sections in the 'Program Options' screen for setting how the Calendar works. The 'Calendar Reminder Options' section is used for setting how reminders work.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## My Pictures

Please click [here](#) for an overview of the 'My Pictures' functionality.

This part of the Program Options allows you to adjust various settings that pertain to the 'My Pictures' functionality. Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Data Sharing

If you have not already done so, please read the section in the documentation titled [sharing your data with other users](#). This will give you an overview what the settings on this window mean.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Notification

The 'Notification Options' screen lets you configure how Organize365 notifies you when something occurs that needs your attention.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Backup

The 'Backup Options' screen lets you configure how Organize365 backs up your data.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## Hotkeys

This section has not yet been documented.

## Program Logs

The 'Program Logs' screen displays the Organize365 system log, which can be used to identify potential problems and can be helpful in the event that you contact us for technical support.

Please use this screen's [Context-Sensitive Help](#) feature to find out more about what the various settings and options do. If anything is not clear please [let us know](#).

## **System Info**

The 'System Info' screen displays useful information about your computer, and your Organize365 installation. The primary purpose for this screen is so that in the event that you contact us for support and we need to know information about your system, you can simply refer to this screen.

## FAQs



## The System Tray Icon

### Question

Where do I find the System Tray Icon?

### Answer:



The section on your Windows Taskbar which contains your clock is officially called the 'Taskbar Notification Area', but it is more commonly called the 'System Tray'. In the System Tray you will find your Windows clock, as well as a number of icons. When you install Organize365 you will see a new icon appears in the system tray (shown below). If you right-click on this new icon the Organize365 tray menu will appear, from where you can open the various tools that make up Organize365, such as your Calendar, and your Address Book.

## Context-sensitive help

### Question

What is Context-Sensitive Help?

### Answer:

Along with this manual, Organize365 provides additional help by means on "Context-Sensitive Help". On most of the Organize365 screens you will see a question mark in your titlebar. If you click on this question mark, you will notice that your mouse cursor changes from an arrow to a arrow accompanied by a question mark.

When your mouse cursor looks like that (above), you can then select any item on the window to find out more about that item. Simply click the "Question Mark" on the titlebar, then select an item on the window to find out more about that item. Easy as that. Generally the documentation (what you're reading now) explains broader concepts about a window or a feature, and the Context-Sensitive Help will explain more specific information about what a particular control or part of a window does.

If you simply point your mouse at a control and leave it there for several seconds, the same information that you would see in the Context-Sensitive Help will appear as a "tooltip". Tooltips are different from Context-Sensitive Help as they disappear as soon as you move your mouse. To close a Context-Sensitive Help window, simply click on it.

## Registration code failing

### Question

The registration code that I was given to register Organize365 does not work!

### Answer:

There are several possible reasons why a registration code will fail when you try to register Organize365. Please read through the following list, and if you still cannot establish what the problem is please [contact us](#).

1. You have not entered the code correctly

Please ensure that you enter the code (and the other information) exactly as it was provided to you. It must be the same case, must use the same characters, the same spacing, etc.

2. The registration code has expired

Registration codes must be entered into Organize365 within 7 days of being issued, or the codes will expire. If you need to register or re-register Organize365 and the registration code that you have was issued more than 7 days ago, please [contact us](#) for a new registration code.

## Addendums



## Using Organize365 in other languages

You can easily use Organize365 in languages other than English. Simply open the "Program Options" window, select the "Interface" section, and select the language you would like to use from the "Language" droplist.

Each language is stored in a separate file on your computer, in your "Organize365\Language" subfolder. Inside that subfolder you should find files such as "German.LNG", "Spanish.LNG", and so forth. If the language you are wanting to use is not in that folder, and if you would like to help us translate Organize365 into that language, please [email us](#) and we will email you the list of words that need to be translated from English. If you translate them (or some of them) and email us the translated words, we will then create a LNG file in your language, and will include it in the next version of Organize365. This is how all the language files so far were created.