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# MT-Organizer v1.2

## User Manual

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2/13/09

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# Chapter 1 – Introduction

MT-Organizer is a compact Windows application to manage contact information for family, friends, and work associates. It has a calendar feature that enables you to establish and view events, set the date and time for reminders of all kinds, and select how you want to be reminded. It is available as a freeware program but only for personal use.

## About this manual

This manual documents MT-Organizer's features and provides instructions to use them effectively. This chapter presents an overview of the MT-Organizer program, conventions used in the manual, and a summary of the topics covered in the remaining chapters of the manual. Contact information for assistance with the manual is given at the end of the chapter.

## Conventions used

The following conventions are used in this manual:

MTO – This abbreviation is used to refer to the MT-Organizer program.

→ *Tip* – Suggests a helpful way to use the program.

*Note*: Alerts you to situations or system responses you might not expect or to options you might want to know about.

<p><b><i>Caution</i></b> – Warns of a potential loss of data or other serious issue to consider before moving forward.</p>
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## Chapters Summary

Chapter 2 of the manual covers how to get started with MT-Organizer, downloading and installing the software and setting initial options. Chapter 3 describes how to use the Contacts feature to add, edit, delete, email, and print your Contacts. Chapter 4 outlines the Reminder feature, including how to add, edit, view, and delete reminders. And the Calendar function, reviewed in Chapter 5, describes how to navigate the calendar and how to manage your events.

## Contact Information

If you have any questions about or issues with this manual, please feel free to contact the MTO Documentation Team at (847) 612-1051 or by email at: [barry.pat@gmail.com](mailto:barry.pat@gmail.com). Contact the developer at [info@mt-one.com](mailto:info@mt-one.com).

## Chapter 2: Getting Started with MT-Organizer

To use MT-Organizer, download the program from the Web and install it on your computer. This chapter covers:

- Downloading and Installing MT-Organizer
- Setup options
- Uninstalling MT-Organizer

### Downloading and Installing MT-Organizer

MT-Organizer Version 1.2 is available as a .zip file on CNET's Download.com Web site. The .zip file contains a self-extracting executable file, mtorg1\_2.exe that installs MT-Organizer. This section describes how to download and install the program.

#### *Notes:*

- *MT-Organizer requires Windows*
- *CNET has tested this software to ensure that it is free of spyware, viruses, and other malware.*

#### To download MT-Organizer:

1. Go to the [CNET Download.com](http://CNET.Download.com) web site.
2. Click "Download Now".
3. Save the file.
4. Double click on the file in the directory you saved it in to begin the installation.
5. Restart your computer.

### Setup Options

You can elect to have MTO start up automatically whenever Window does, and you can set a password to protect your contact information. Instructions for both are defined in this section.

#### To have MTO open when Windows starts:

1. From the menu, click **Tools** then **Options** to open the dialog box in Figure 2.1.
2. Select the **Startup** option.
3. Click **OK**.

MTO opens automatically every time Windows starts.

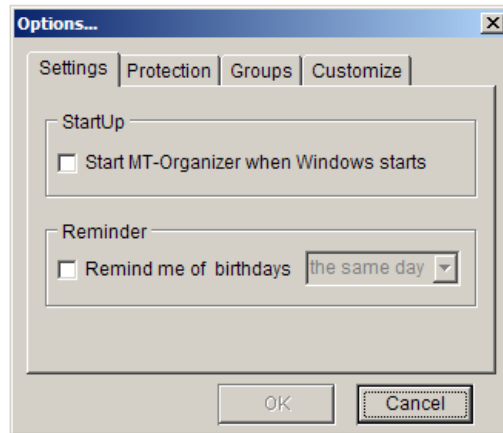


Figure 2.1 – Tools > Options > Settings

To set a password to limit access to MTO:

***Caution*** – You ***must*** remember the password you set or you will be unable to open MTO. There will be no way to recover your data.

1. From the menu, click **Tools** then **Options**.
2. Click the **Protection** tab. The dialog box in Figure 2.2 opens.
3. Check the box to select **Use protection**.
4. Enter a password in the **Set a password** field.
5. Click **Store**.
6. Click **OK**.

The next time you open MTO you will be prompted for the password.

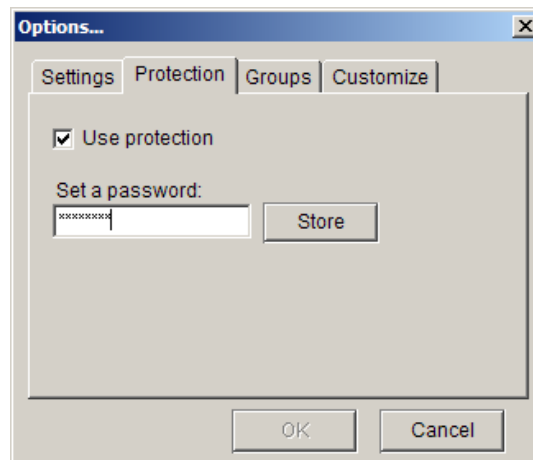
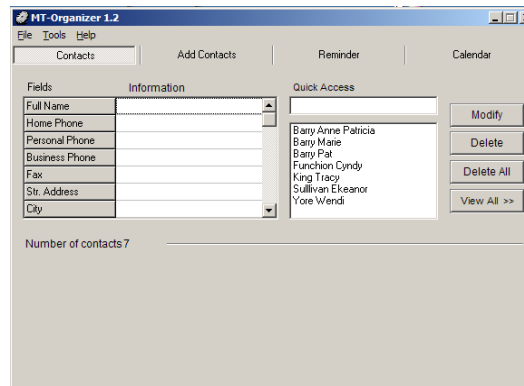


Figure 2.2 – Tools > Options > Protection

### To start MT-Organizer:

Double-click the MT-Organizer desktop icon. The program opens with the Contacts screen. (Figure 2.3)



**Figure 2.3 – MT-Organizer Startup Screen**

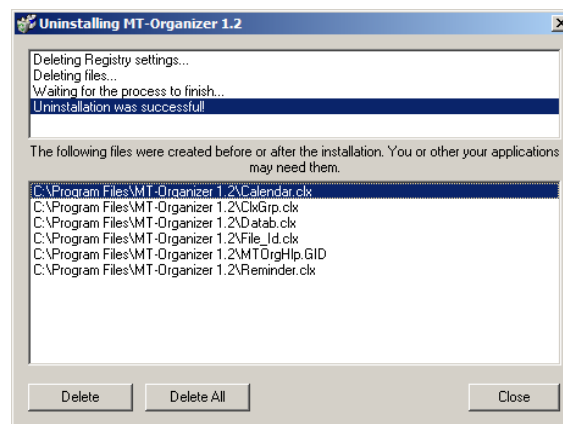
*Note: After opening MT-Organizer, there is no button on the Taskbar indicating that it is open. There is an icon in the system tray though, that you can use to quickly return to the MTO window.*

### **Uninstalling MT-Organizer:**

You can uninstall MT-Organizer in the same way you would any other program.

#### To uninstall MT-Organizer:

1. Click Windows **Start > Settings > Control Panel > Add/Remove Programs.**
2. Select MT-Organizer 1.2 from the list of currently installed programs.
3. Click **Change/Remove.**
4. Click **Delete, Delete All, or Close** in the uninstall window (Figure 2.4).



**Figure 2.4 – MTO Uninstall Screen**



## Chapter 3: Contacts

This chapter discusses how to use MTO's Contacts features, including how to add, change, print, and delete contacts, as well as how to select which contact fields to use. Outlined in the sections below are procedures for the following:

- Adding contacts
- Viewing contacts
- Modifying contacts
- Deleting contacts
- Printing contacts
- Selecting contact fields

### Adding Contacts

MTO allows you to add Individual contacts and business contacts. Each type has its own set of fields, so you must decide up front which type of contact you want to add. Table 1 shows the available fields for Individual (I) and Business (B) contacts, and describes their content.

*Note: All fields accept any alphanumeric content unless specified otherwise.*

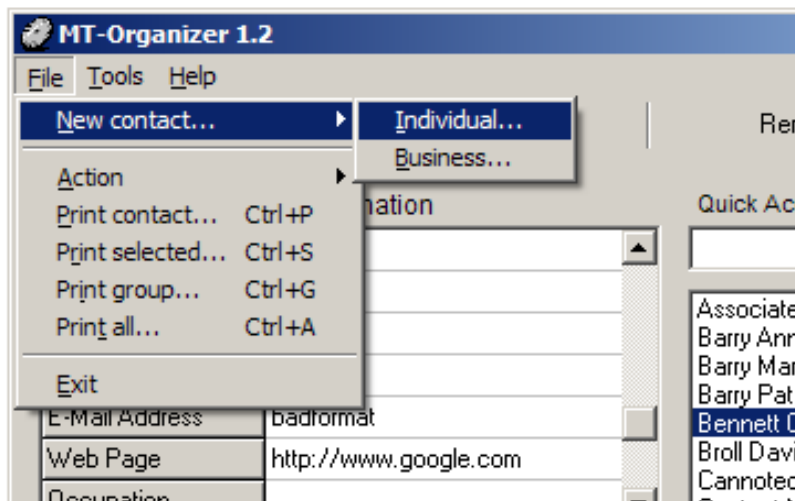
**Table 1 - Individual and Business Contact Fields**

Field	I	B	Notes
First, Middle, Last Name	I		Must have at least 1 character in either the First or Last Name field. All other fields are optional.
Company Name		B	Must have at least 1 character. All other fields are optional.
Address, City, State, Zip, Country	I	B	Optional, any text, any format.
Phone Number		B	Optional, any text, any format.
Home Phone, Personal Phone	I		Optional, any text, any format.
Fax	I	B	Optional, any text, any format.
Email Address	I	B	Optional, any text, any format.  A message notifies you of an invalid email address and allows you to add it anyway.  Can add multiple email addresses.

Website	I	B	Optional, any text, any format. MTO adds "http:///" to entered text if it isn't already included.
Occupation	I		Optional, any text, any format.
Birthday	I		Optional. Accepts only numeric input of valid months, days, and years.
Group	I	B	Optional. Selected from a drop-down list of available options.
Notes	I	B	Optional, any text, any format.

To add an Individual contact:

1. Choose one of the following ways to add an Individual contact:
  - Choose **File > New Contact > Individual** (Figure 3.1) OR
  - Click **Add Contacts** at the top of the screen and click **New**.



**Figure 3.1 – Add an Individual Contact**

Both options bring up a clear **Add Contacts** screen (Figure 3.2)

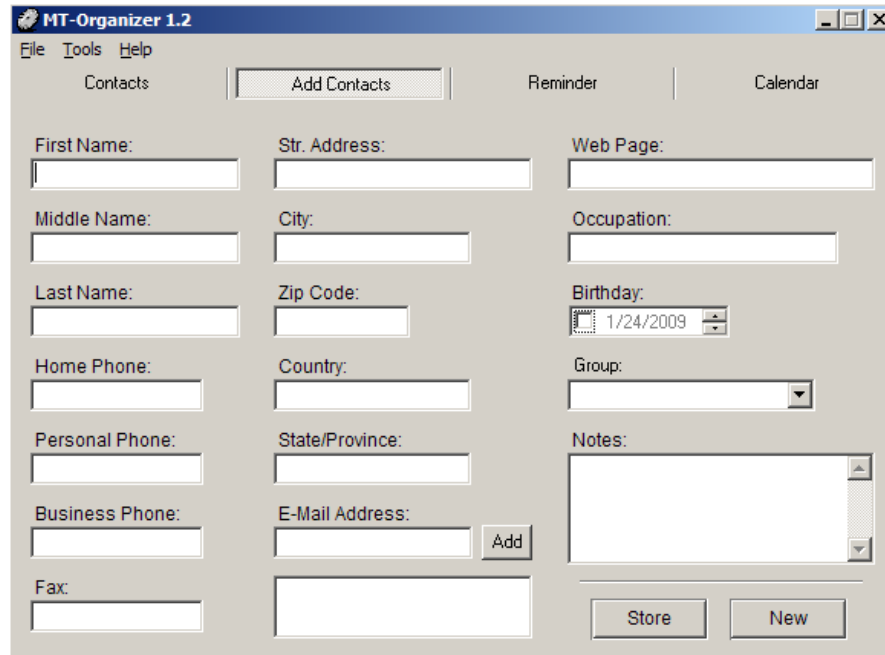


Figure 3.2 – Add Contacts Screen

2. Enter name fields: First, Middle, Last

**Note:** You must have at least one character in either the First or Last Name field. All other fields are optional.

3. Enter phone numbers: Home, Personal, Business, Fax
4. Enter Street Address, City, Zip Code, Country, and State/Province.
5. Enter Email Address and click **Add**.
  - The address will be moved into the textbox below the field.
  - To store additional email addresses, repeat this step.
  - If an address you input is not a valid email address format, MTO will ask you if you want to add it anyway.
6. Enter the contact's Web page address.
 

→ **Tip:** The "http://www." is not required.
7. Enter Occupation
8. Enter Birthday
  - Click the checkbox to enable the field.
  - Point the cursor to the month, day, or year part of the date, and click.
  - You can either type in the value for that field or use the arrows provided.
9. Select a Contact Group from the drop-down list.
  - Click the arrow to the right of the field.

- Select a group from the drop down list (Figure 3.3)

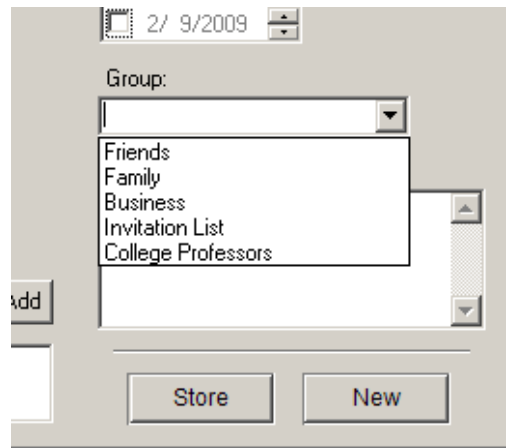


Figure 3.3 – Contact Group Drop-down List

**Note:**

*If you do not assign a group, you can ignore the error message that the contact won't appear in the Quick Access field unless you choose to view all groups. It will be there.*

*When you view other groups, the unassigned contact will appear as many times as you have defined groups. You can undo this effect by deleting the extra copies or assigning a group to the contact.*

*For information on using and managing Groups, see the [Groups chapter](#).*

10. Enter Notes.

11. Click **Store**.

**Notes**

- *The data just entered remains in the form after clicking Store. It may appear that the data hasn't been stored but it has.*
- *Clicking **Store** again will create a duplicate contact.*
- *Click **New** to clear the form.*

To add a Business contact:

1. Choose one of the following ways to add an Business contact:
  - Choose **File > New Contact > Business** (Figure 3.4):

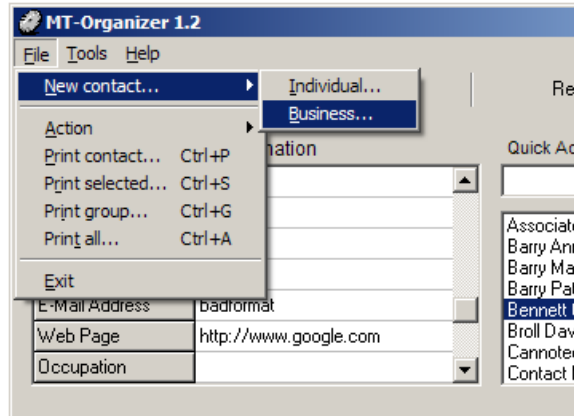


Figure 3.4 – Add Contacts Screen

- Click **Add Contacts** at the top of the screen and set the **Group** field to “Business” using the Group drop-down menu. (See Figure 3.5 and “Adding Individual contacts” above.)

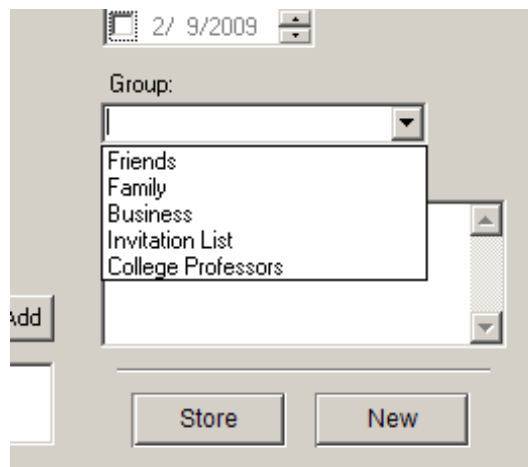


Figure 3.5 – Group Drop-down List

Both approaches bring up the **Add Contacts** screen with the Business group selected and the Business contact fields available. (Figure 3.6)

**Figure 3.6 – Add Business Contact Screen**

2. Enter Company name.

***Note:** At least one character is required. All other fields are optional.*

3. Enter Phone and Fax numbers.
4. Enter Street Address, City, Zip Code, Country, and State/Province.
5. Enter Email Address and click **Add**.
  - The address will be moved into the textbox below the field.
  - To store additional email addresses, repeat this step.
  - If an address you input is not a valid email address format, MTO will ask you if you want to add it anyway.
6. Enter the company's Web page address.

→ ***Tip:** The "http://www." is not required.*
7. Enter Notes.
8. Click **Store**.

**Notes**

- *The data just entered remains in the form after clicking **Store**. It may appear that the data hasn't been stored but it has.*
- *Clicking **Store** again will create a duplicate contact.*
- *Click **New** to clear the form.*

## Viewing contacts

MTO offers several methods for viewing your contacts on the Contacts screen and, with each method, different options for selecting which contacts to view. This section gives instructions for viewing contacts using the following methods:

- View contacts using View All
- View contacts using Quick Access
- View contacts by Group

### To view contacts using View All:

1. Click **Contacts** at the top of the page.
2. Click **View All**.

Information for all contacts appears at the bottom of the page.

*Note: View All does not display the Group field.*

### To view a single contact using Quick Access:

1. Click **Contacts** at the top of the page.
2. Enter the contact's name in the *Quick Access* field.
  - The *Quick Access* search is case sensitive.

The contact's information is displayed on the left side of the page.

*Note: Quick Access does not display the Group field.*

### To filter the contacts available in the Quick Access list:

1. Select **File > Action > View group** to see the list of available groups. (Figure 3.7)
  - MTO selects All by default.

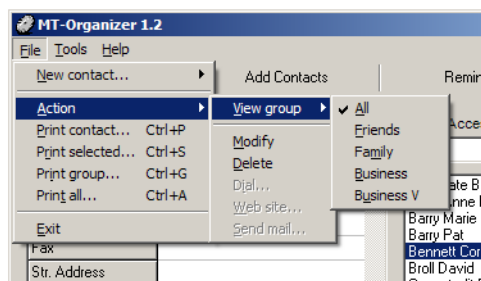


Figure 3.7 – View All Groups Menu

→ **Tip:** Right-click anywhere in the Quick Access list to bring up the File menu options (Figure 3.8)

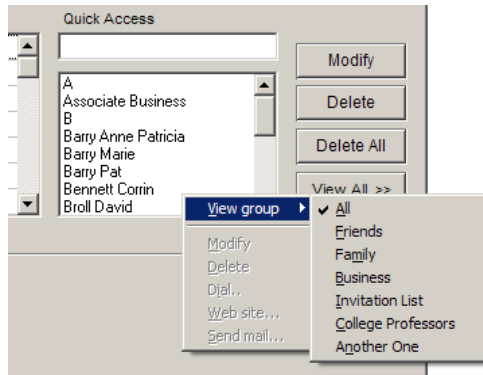


Figure 3.8 – View Groups, Right-click

2. Select a group for only those contacts in that group to appear in the *Quick Access* list.
3. Repeat Steps 1 and 2 to select additional groups. (Figure 3.9)

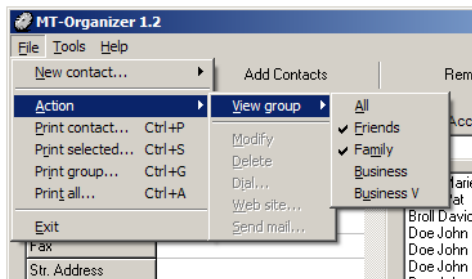


Figure 3.9 – Menu to View Multiple Groups

4. Repeat Step 1 and de-select groups as needed.

**Note:** When no group is selected (Figure 3.10), the contacts without groups appear.

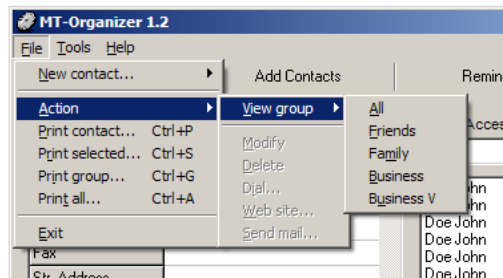


Figure 3.10 – Menu to View No Groups



## Modifying contacts

MTO allows you to modify a contact's information.

### To modify a contact:

1. Click **Contacts** at the top of the page.
2. Select the contact by clicking on their name in the *Quick Access* list.
3. Click **Modify** → The **Add Contacts** screen appears.  
→ *Tip: You can double-click on the contacts name in the Quick Access list*
4. Modify the contacts information.
5. Click OK.

## Deleting contacts

MTO allows you to delete contacts in several ways depending on their number and characteristics. This section describes the following options for deleting contacts:

- Delete a single contact
- Delete multiple contacts
- Delete all contacts in a group
- Delete all contacts

### To delete a single contact:

1. Click **Contacts** at the top of the screen.
2. Select the contact by clicking on their name in the *Quick Access* list.
3. Click Delete  
→ *Tip: To use the menu, click File > Action > Delete (See Figure 3.11)*  
→ *Tip: Right-click and select Delete from the context menu.*
4. Click Yes in the Confirm dialog box.

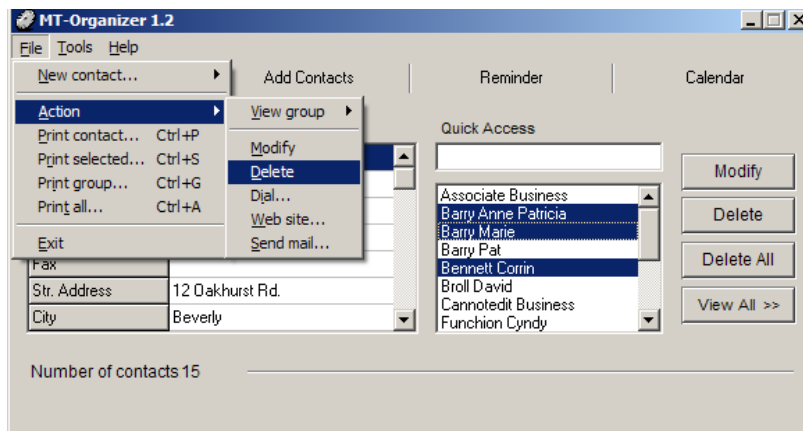


Figure 3.11 – Menu to Delete Selected Contacts

### To delete multiple contacts:

1. Click **Contacts** at the top of the screen.
2. Click on the name of the first person in the *Quick Access* list.
3. Select additional names using by:
  - a. holding down SHIFT and clicking the left mouse button.
  - b. holding down CTRL and clicking the left mouse button.
4. Click **Delete**
  - *Tip: To use the menu, click **File** > **Action** > **Delete** (See Figure 3.11)*
  - *Tip: Right-click and select Delete*
5. Click **Yes** in the Confirm dialog box.

### To delete all contacts in a group:

1. Click **Contacts** at the top of the screen.
2. Filter the contacts in the *Quick Access* list to include only the group you want to delete. (See “Filtering” in the [Viewing Contacts](#) section.)
3. Click on the name of the first person in the *Quick Access* list.
4. Hold down SHIFT and click the right mouse button on the last name in the *Quick Access* list. (All names are highlighted)
5. Click **Delete**
  - *Tip: Right-click and select Delete*
6. Click Yes in the **Confirm** dialog box.

### To delete all contacts:

1. Click **Contacts** at the top of the screen.
2. Click **Delete All**
  - *Tip: To use the menu, click **File** > **Action** > **Delete** (See Figure 3.11)*
  - *Tip: Right-click and select Delete*
3. Click **Yes** in the **Confirm** dialog box.

## Printing contacts

In MTO you can print contacts individually or in multiples, print a group or groups of contacts, or print all of them. This section outlines instructions for all of these options.

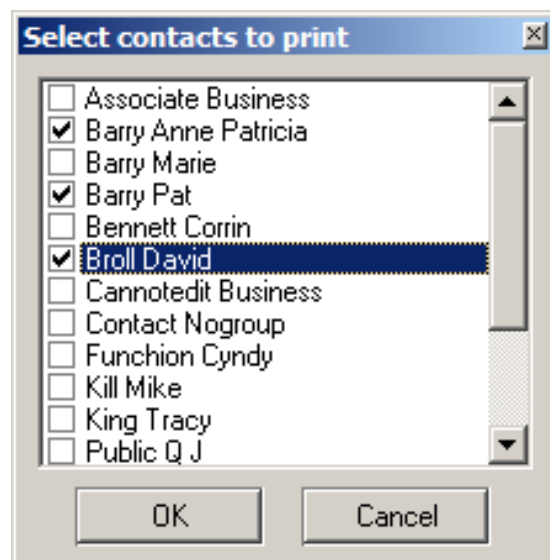
- Print a single contact
- Print multiple contacts
- Print a Group or Groups of contacts
- Print all contacts.

### To print a single contact:

1. Click **Contacts** button at the top of the page.
2. Select a contact from the *Quick Access* section.
3. Click **File > Print Contact** in the menu.
4. Modify your printer settings.
5. Click **OK**.

To print multiple contacts:

1. Click **Contacts** button at the top of the page.
2. Click **File > Print Selected** from the menu.
  - The Select contacts to print dialog box opens. (Figure 3.12)



**Figure 3.12 – Select contacts to print**

3. Check the boxes next to the names of the contacts you want to print.
4. Click **OK**.
5. Modify your printer settings.
6. Click **OK**.

To print a group or groups of contacts:

1. Click **Contacts** at the top of the page.
2. Click **File > Print Group** from the menu.
  - The Select groups to print dialog box opens. (Figure 3.13)

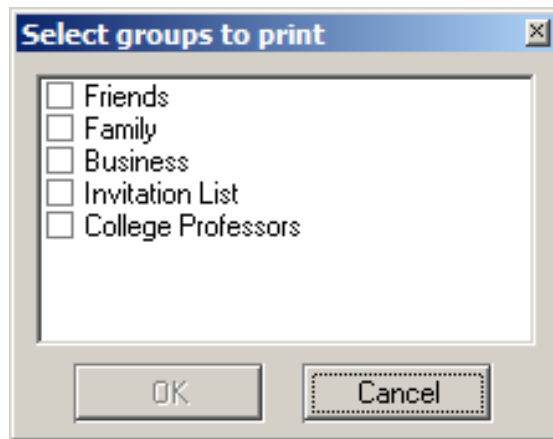


Figure 3.133 – Select groups to print

3. Select groups of contacts that you want to print by checking the boxes next to them.
4. Click **OK**.
5. Modify your printer settings.
6. Click **OK**.

To print all contacts:

1. Click **Contacts** button at the top of the page
2. Click **File > Print All** from the menu.
3. Modify your printer settings.
4. Click **OK**.

## Selecting contact fields to use

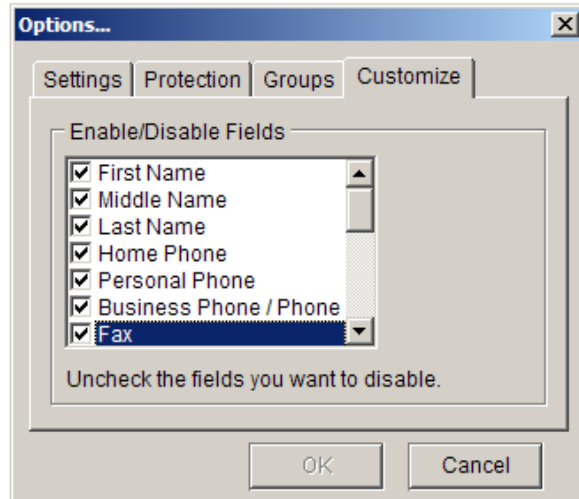
MTO allows you to select which of the available contact fields you want to enable or disable.

To select which contact fields to capture:

1. Click **Tools > Options**.
2. Select the **Customize** tab. (Figure 3.14)
3. Check fields you want to enable.
4. Uncheck fields you want to disable.
5. Click **OK**

The disabled fields are gray on the *Add Contacts* screen and will not accept input.

**Note:** Contact information previously entered in disabled fields has not been deleted; it is simply not accessible. You can edit the field again if you enable it.



**Figure 3.14 – Tools – Selecting Contact Fields**

## Chapter 4 – Contact Groups

MTO has the capability to group your contacts using three pre-defined group labels that you can assign to your contacts: Friends, Family, and Business. It also allows you to define your own contact groups so you can, for example, create an invitation list. This chapter outlines procedures for:

- Adding contact groups
- Viewing contact groups
- Modifying contact groups
- Printing contact groups
- Deleting contact groups

### Adding contact groups

You can create your own group definitions to assign to your contacts, and use as a selector for viewing or printing contacts by group.

#### To add a contact group:

1. Click **Tools > Options** from the menu.
2. Select the **Groups** tab (The dialog box in Figure 4.1 below appears.)
3. Type a name in the *Group name* field.
4. Click **Add**.
5. Click **OK**

This group name is now defined and will be available when adding, viewing, or printing contacts.

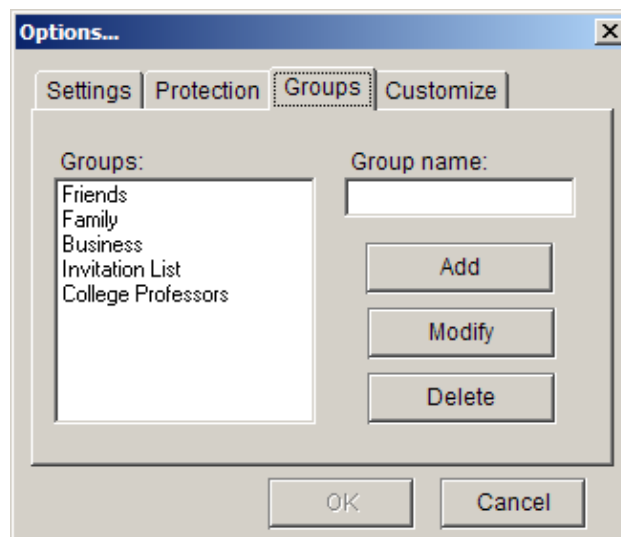


Figure 4.1 – Tools > Options > Groups

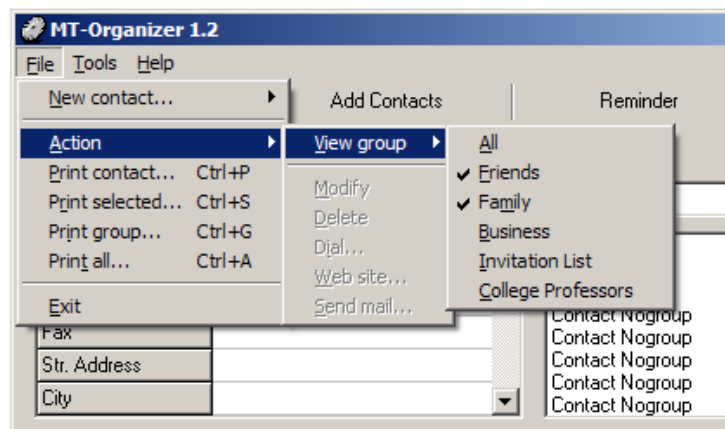
## Viewing contact groups

You can filter the contacts in the Quick Access list by selecting which groups to view. Any contact groups you've added can be selected.

To view a contact group:

1. Click **Contacts**
2. Select **File > Action > View Groups** from the menu.
3. Select the Group of contacts you want to view. (Figure 4.2)
4. Repeat Steps 1–3 to select additional groups.

The contacts from the groups you selected appear in the *Quick Access* area.



**Figure 4.2 – File > Action > View Groups list**

***Note:** Contacts without an assigned group name will appear with any group you select and will appear multiple times in the list. Correct this by assigning group names to all contacts.*

## Modifying contact groups

You can modify group names you have defined. You cannot modify MTO's three, pre-defined group labels: Friends, Family, and Business.

To modify a contact group:

1. Click **Tools > Options** from the menu.
2. Select the **Groups** tab (The dialog box in Figure 4.1 appears.)
3. Click the Group name you want to modify.
4. Type a new name for the group.
5. Click **Modify**.  
The group name in the list is replaced by the new name.
6. Click **OK**.

All contacts with the old group name now have the new name.

The old group name is replaced on the Group drop-down menu on the Add Contacts screen.

## Printing contact groups

You can select a single group or multiple groups of contacts for printing.

To print contact groups:

1. Click **Contacts** at the top of the page.
2. Select **File > Print Group** from the menu. The dialog box in Figure 4.3 appears.

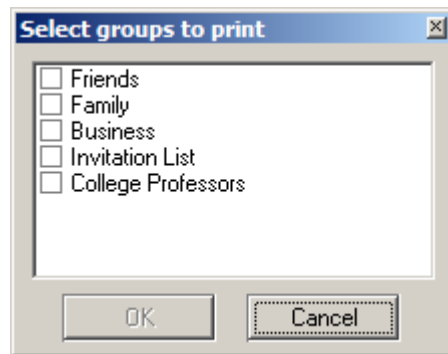


Figure 4.3 – File > Print Group list

→ *Tip: Ctrl+G is a shortcut that will bring up the same screen*

3. Select the group or groups to print and click **OK**.
4. Select printer settings and click **OK**.

## Deleting contact group name

You can delete group names you have defined. You cannot delete MTO's three, pre-defined group labels: Friends, Family, and Business

*Note: This function deletes the group name, not the contacts assigned to this group.*

To delete a group label:

1. Click **Tools > Options** from the menu.
2. Select the **Groups** tab (The dialog box in Figure 4.1 appears.)
3. Click the Group name you want to delete.
4. Click **Delete** and click **OK**.

### **Notes**

- *Contacts assigned to this deleted group retain the deleted group label.*
- *However, since the group name no longer exists, there is no longer any way to select at deleted group to view or print.*



## Chapter 5: Communication Tools

MTO facilitates your communication with your contacts by allowing you to send emails to your contacts and to visit their Web site. The Calling Contacts feature is disabled for this release, so this chapter provides instructions on:

- Sending emails
- Visiting contacts' websites

### Sending emails

MTO allows you to send an email to a contact with a valid email address from within MTO. This has only been tested for use with Outlook Express.

#### To send an email using MTO:

1. Click **Contacts** at the top of the page.
2. Select a contact from the **Quick Access** list (See [Viewing Contacts](#)).
3. Click **File > Action > Send Mail**.
4. If the contact has more than one email address, select the addresses you want (Figure 5.1) and click **OK**. Outlook Express opens with your contact's addresses in the *To:* field. Otherwise, proceed to Step 5.

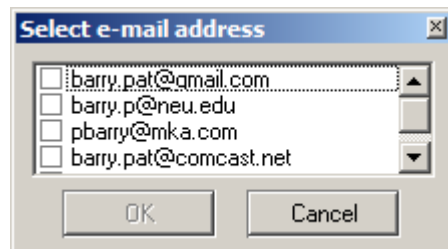


Figure 5.1 – Select email address window

5. Enter your message information and click **Send**.

### Visiting contacts' Web sites

You can launch your internet browser from within MTO and visit any contacts Web site if a valid address has been stored.

#### To visit a contact's website:

1. Click **Contacts** button at the top of the page.
2. Select a contact.
3. Click **File > Action > Web site** in the menu.

The contacts website opens in your default browser.

## Chapter 6: Reminders

MTO's Reminder function allows you to create and manage reminders for the dates and times of your choosing. At the appointed time on the selected date, a popup screen will display the reminder message you saved. You can also choose to have a sound play along with the reminder. You can also have MTO remind you of your contacts birthdays up to a week early. This chapter provides instructions on how to:

- Adding reminders
- Viewing reminders
- Modifying reminders
- Deleting a reminders
- Setting the birthday reminder option

The Reminders screen is shown in Figure 6.1 and the fields are described in Table 2 below.

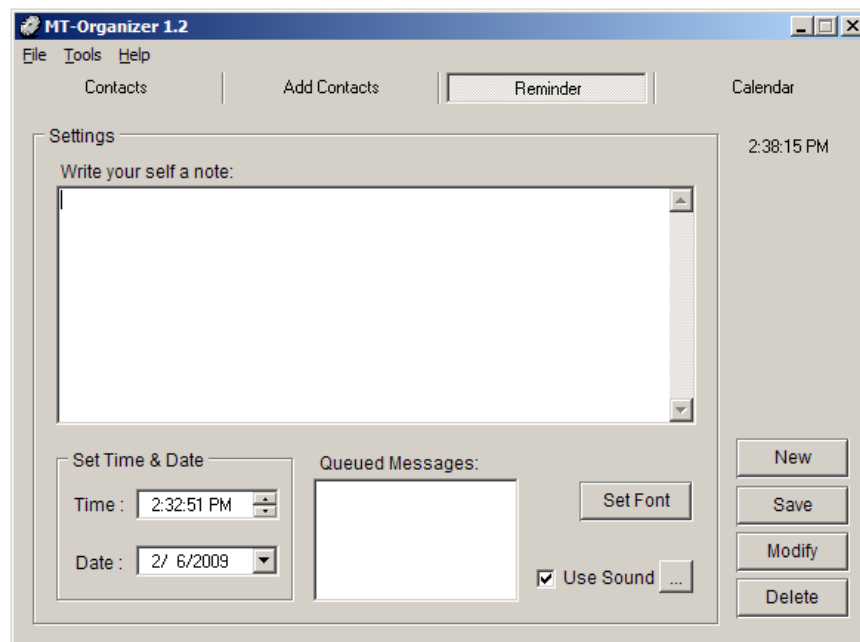


Figure 6.1 – Reminders Screen

Table 2 – Reminders Screen Fields

<u>Settings fields</u>	<u>Notes</u>
Write yourself a note	The content of the reminder. Must have at least one alphanumeric character.
Time	The time for the reminder. Valid numeric values only: hh:mm:ss

Date	The date of the reminder. Valid numeric values only: mm/dd/yyyy
Set Font	<i>Optional.</i> Used to set font, color, and style.
Use Sound	<i>Optional.</i> If selected, a sound will play at the reminder time.
... button	<i>Optional.</i> To select which sound to play with the reminder. If none is chosen the default sound will play. Only .wav files can be used.
Queued Messages	Lists the time and date of saved reminders.

## Adding reminders

Reminders can be set for any date and time, but there can be only one reminder for any particular date and time combination. At least one character is required; they can be as long as you need.

### To add a reminder:

1. Click **Reminder** at the top of the page.
2. Click **New** to clear the *Write yourself a note* field, if needed.
3. Select the time for the reminder.
  - a. Click in any portion of the *Time* field.
  - b. Use the ↑ ↓ arrows to scroll to the desired value for that part of the field.
  - c. Use the ← → keyboard arrows to move between parts of the field.
  - d. Do this to set the hours, minutes, and seconds.
  - e. Type “A” or “P” for AM or PM.

→ *Tip: You can type in the desired value for any part of the field.*

4. Select the date for the reminder:
  - a. Click in the any portion of the *Date* field.
  - b. Use the ↑ ↓ arrows to scroll to the desired value for that part of the field.
  - c. Use the ← → keyboard arrows to move between parts of the field.
  - d. Do this to set the month, day, and year.

**Note:** *You cannot set a reminder for a date or time in the past.*

→ **Tip:** Click the arrow next to the date field and navigate to the desired date using the drop-down calendar.

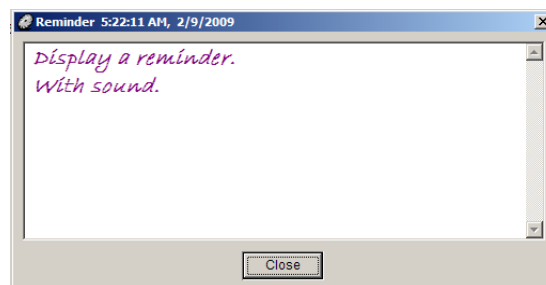
5. Enter the reminder text in the *Write your self a note* field.
6. Set font characteristics for your reminders (*Optional*)
  - a. Click **Font**
  - b. Select the font, size, color, and style.
  - c. Click **Ok**
7. Set a sound to play at the reminder time: (*Optional*)
  - a. Check the box next to **Use Sound** to have a sound play.
  - b. Click  to select the sound file to be played from a file on your computer.

**Note:** If you elect to use sound but do not select a sound, the default sound will play. Only .wav sounds files can be used.

8. Click **Save**.

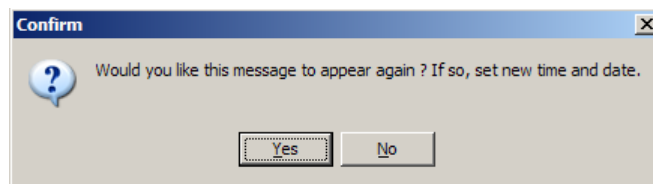
Your reminder has been set and will be listed in the *Queued Messages* field.

At the appointed date and time, the popup reminder window will appear (Figure 6.2). If you elected to use sound, it will play when the reminder pops up.



**Figure 6.2 – Reminder Popup Window**

When you click **Close**, MTO will ask if you want to reset the reminder. (Figure 6.3)



**Figure 6.3 – Reminders – Queued Messages Sort Sequence**

To reset the reminder:

1. Click **Yes** in the **Confirm** dialog box.
2. Change the date, time, or content for the reminder.
3. Click **Save**.

## Viewing reminders

The list of upcoming reminders is displayed in the *Queued Messages* field.

*Note: MTO sorts reminder messages in the queue by time, not by date. (Figure 6.4)*

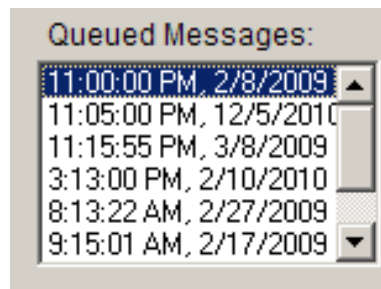


Figure 6.4 – Sort Sequence for Queued Messages

To view upcoming reminders (Queued Messages):

1. Click **Reminder** at the top of the page.
2. Use the scrollbar to scroll through the **Queued Messages** list.
3. Click on the reminder you wish to view.

→ *Tip: Click on any queued message and use the ↑ ↓ keyboard arrows to scroll.*

## Modifying reminders

MTO allows you to modify the date and time or the content and font of a reminder. Both procedures are outlined below.

To modify a reminders date +/- or time:

1. Click **Reminder** at the top of the page.
2. Select the reminder in the *Queued Messages* list. (See [Viewing Reminders](#)).
3. Change the date and/or the time. (See [Adding a Reminder](#)).
4. Click **Modify**.

Your reminder has been modified (moved) and will display in the *Queued Messages* field at the new date & time.

To modify a reminder's content and/or style:

1. Click **Reminder** at the top of the page.
2. Select the reminder in the *Queued Messages* list. (See [Viewing Reminders](#)).
3. Change the reminders content and font as desired.
4. Change the *Date* and *Time* fields to reflect the date & time of the reminder you want to modify. (See [Adding a Reminder](#)).

**Note:**

*If the date and time in the Date and Time fields reflect those of a different reminder you've set, you will get an error message saying you already have a reminder at that time.*

*If you have not already set a reminder at the date & time shown in the Date and Time fields, when you click Modify you will create a new reminder at the date & time shown, and the reminder you wanted to modify will remain unchanged..*

*The date & time fields must match the date & time of the reminder whose content you want to modify.*

5. Click **Modify**.

## Deleting reminders

To delete a reminder:

1. Click **Reminder** at the top of the page.
2. Select the reminder in the *Queued Messages* list. (See [Viewing Reminders](#)).
3. Click **Delete**.
4. Click **Yes** in the confirmation dialog box.

Disregard the message "Menu index out of range". Your reminder has been deleted and removed from the **Queued Messages** list.

## Setting the birthday reminder options

You can elect to have MTO remind you of your contacts' birthdays and select how early you'd like to be reminded of them.

**Note:** *This option will set reminders for all of your contacts for whom you have entered a birthday.*

To set birthday reminder options:

1. Click **Tools** > **Options** from the menu.
2. Select the **Settings** tab.
3. Select the option to have reminders set automatically for contacts birthdays.
4. Click the arrow and select when to be reminded from the drop-down menu. (Figure 6.5)

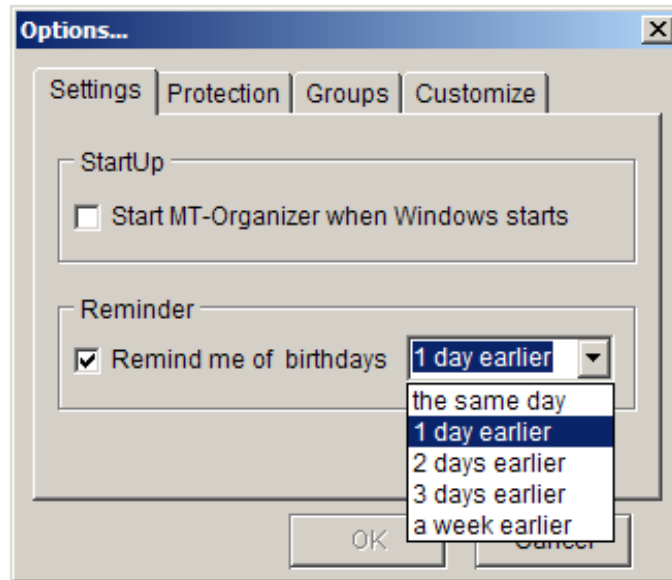


Figure 6.5 – Setting Birthday Reminder Options

5. Click OK.

MTO set reminders for all of your contacts' birthdays.

*Note: These reminders do not appear in the Queued Messages list.*

To get birthday reminders:

When you open MTO on the day a birthday reminder is due, a popup window will appear with the message based on whether it is actually the person's birthday, or an early reminder.

(Figure 6.6)

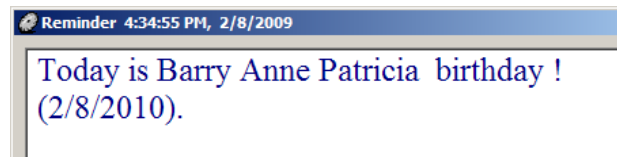


Figure 6.6 – Birthday Reminder Popup Window.

*Note: You have to open MTO on the day the reminder is due in order to receive the message.*

# Chapter 7: Calendar

MTO's Calendar feature allows you to add, modify, and delete notes by date. It has a monthly calendar for scrolling to the date you want and the ability to store as much information pertaining to that date as you wish. This chapter describes how to use the following Calendar features:

- Navigating the calendar
- Adding calendar notes
- Viewing calendar notes
- Modifying calendar notes
- Deleting calendar notes

The Calendar screen in Figure 7.1 appears.

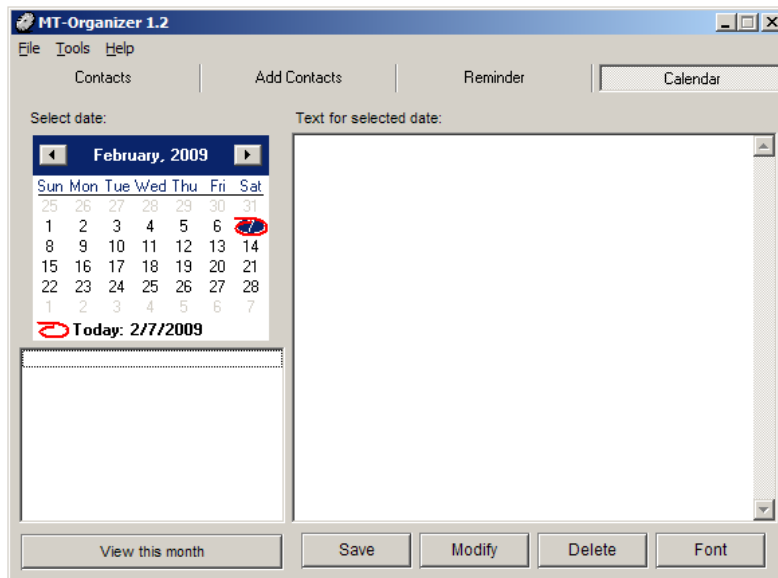


Figure 7.1 – Calendar Screen

## Calendar Fields

Select Date

View this month

Text for selected date

## Notes

The tool to select dates for your notes.

Displays the dates and the first word or two of your notes for the month shown.

The content of your notes. Must have at least one alphanumeric character to create a calendar note.



## Navigating the Calendar

The calendar in the upper left corner of the screen is for selecting dates. The current date is circled in red and there are arrows on both sides of the month name.

To navigate in the calendar:

1. Click **Calendar** at the top of the page
2. Select the day: Click on a date in the month shown.
3. Select the month: Use the left & right arrows shown to scroll forward or backward a month at a time.

→ *Tip: Click on the month name & select a month from the popup list. (Figure 7.2b)*

4. Select the year:
  - a. Click on the year shown.
  - b. Scroll to the desired year using the up & down arrows. (Figure 7.2c)
    - The up arrow scrolls forward in time.
    - The down arrow scrolls backward in time.

→ *Tip: Use the keyboards up & down arrows to scroll.*

- c. Press **Enter**

To return to the current date:

Click on the red circle or the date at the bottom of the calendar.

→ *Tip: Right-click anywhere in the calendar and click Go to today (Figure 7.2a).*

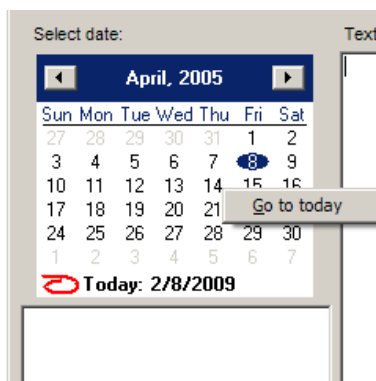


Figure 7.2a

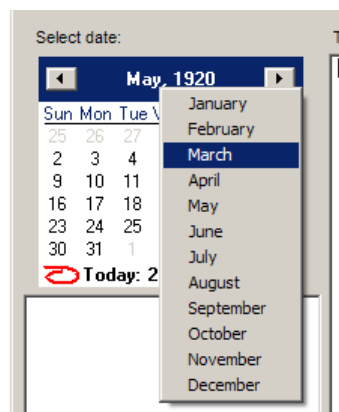


Figure 7.2b

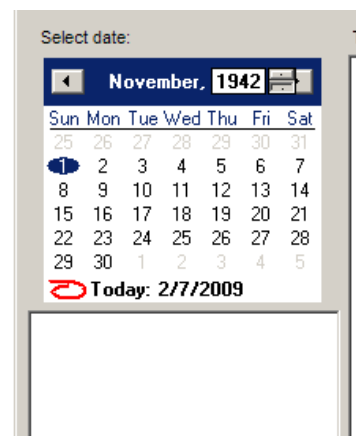


Figure 7.2c

Figure 7.2 – Navigating the Calendar

## Adding calendar notes

The *Text for selected date* field allows you to input a note for any day you choose. The note must have at least one character, can be any length, and accepts alphanumeric characters.

### To add a calendar note:

1. Click **Calendar** at the top right-hand corner
2. Select the date you want. (See [Navigating the Calendar.](#))
3. Enter the note you want to save in the *Text for selected date* field.
4. Set the font characteristics for your note (*Optional*):
  - Click **Font**.
  - Select the font, size, color, and style you want.
  - Click **Ok**.
5. Click **Save** (The message, “Your entry has been stored successfully” appears.)
6. Click *View this Month* to see the note you entered.

## Viewing calendar notes

You can view the notes you’ve saved in the calendar by clicking on the date in the calendar or selecting the date from the View this month list.

### To view a calendar note:

1. Click **Calendar** at the top at the top of the screen.
2. Navigate to the month with the desired note.  
(See [Navigating the Calendar.](#))
3. Click *View this month* to display a list of notes for that month.
4. Click on a date in the calendar or select a date from the list shown.

The note for that day appears in the *Text for selected date* box.

**Note:** *When you scroll to a new month, the list of dates in the View this month box stays the same until you update it for the new month by clicking View this month.*

**Note:** *The dates in the View this month box are sorted by the first number of the Day field. (E.g., “19” is before “9” because “1” is before “9”).*

→ **Tip:** *Right-click anywhere in the View this month field & select Clear to clear the list of notes displayed.*

## Modifying calendar notes

MTO allows you to modify the contents of the notes you create in Calendar. You cannot change the date for a note, however. You must create a new note for the new day and delete the old one. Both procedures are outlined below.

### To modify the contents of a calendar note:

1. Click **Calendar** at the top at the top of the screen.
2. Select the date with the note you want to change.  
(See [Navigating the Calendar](#)).
3. Change the content of the note.
4. Change the font characteristics for your note (Optional):
  - i. Click **Font**.
  - ii. Select the font, size, color, and style you want.
  - iii. Click **Ok**.
5. Click **Modify** → Your changes have been saved

The date and first few words of the modified note appears in the View this month list..

### To modify the date of a calendar note:

1. Click **Calendar** at the top at the top of the screen.
2. Select the date with the note you want to change.  
(See [Navigating the calendar](#)).
3. Click and drag on the note text to highlight it.
4. Right-click and select **Cut**.
5. Click **Modify** (This will delete the old note because it is now empty.)
6. Navigate to the desired date (See [Navigating the calendar](#).)
7. Right-click in the text box and select **Paste**.
8. Click **Save** (This creates the new note.)

Your calendar note has been moved to the new date.

## Deleting calendar notes

MTO allows you to delete a single calendar note or multiple calendar notes at the same time. Both procedures are outlined below.

### To delete a single calendar note:

1. Click **Calendar**.
2. Select the date with the note you want to delete.  
(See [Navigating the Calendar](#).)
3. Click **Delete**.
4. Click **Yes** on the confirmation dialog box.

The note for the selected date has been deleted.

→ *Tip:* You can also delete a calendar note by erasing all text in the note and clicking *Modify*.

### To delete multiple calendar notes:

1. Click **Calendar**.
2. Navigate to the month with the notes you want to delete.  
(See [Navigating the Calendar](#).)
3. Select the date of the first note you want to delete in the *View this month* field.
4. Select additional notes to delete:
  - Press the Shift key and click on adjacent dates.
  - Press the Ctrl key and click on dates that are not adjacent.
5. Click **Delete**.
6. Click **Yes** on the confirmation dialog box.

Notes for the selected dates have been deleted.

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