

# SwitchSuite™

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*Distributed by*



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## Overview

SwitchSuite<sup>™</sup> is an Information Manager for the Microsoft Windows operating environment. The software is written using Borland Delphi and Visual C++ by Jay Jolicoeur of Switchback, Inc. This software and documentation is copyrighted by Jay A. Jolicoeur and is subject to the protection accorded to it by the United States copyright laws. Please review the Software License Agreement before using this product. SwitchSuite<sup>™</sup> is a trademark of Switchback, Inc. SwitchBack, Inc.<sup>®</sup> is a Registered Trademark of Switchback, Inc.

This product is distributed as shareware. All of the features of SwitchSuite are fully functional for a period of 20 days from the date of first use, if not registered after 20 days, you will get an annoying reminder message when you do anything and the internet functions will not work. To use the product beyond the 20 day period please register it.

To register, print out and fill in the registration form found at the end of this documentation and send to:

SwitchSuite Registration  
Switchback, Inc.  
PO Box 427  
Holden, MA 01520

Voice Phone: (508) 753-7353  
Fax Phone: (508) 829-9364  
email: support@switchback.com  
URL: <http://www.switchback.com>

Once you have the registration key, click on About/Register SwitchSuite and enter the Registration Key.

### ***Minimum System Requirements***

Microsoft Windows 95/98/NT/2000  
Winsock loaded to connect to mail host  
32 Meg RAM  
10 free hard drive space

### ***Product Updates***

To stay informed of all SwitchSuite releases, you can subscribe to the SwitchSuite mail list by sending the following command in the body of your message to [LISTSERVER@switchback.net](mailto:LISTSERVER@switchback.net)

SUBSCRIBE SWSUITE-DEV yourfirstname yourlastname

### ***Bug Reporting***

All questions or bug reports should be send to: support@switchback.com, or you can use the bug reporting form at URL: <http://www.switchback.com/HelpDesk.html>.

Please provide as much information as possible when reporting bugs.

## ***On the Windows Taskbar***

There are two (2) icons that appear on the Windows Taskbar when SwitchSuite is running, they are actually 2 different states of the same process.



This empty mailbox icon indicates that the incoming mailbox is currently empty. It is in this state at initial startup, and after any mail in the incoming mailbox is read. The hint (description) for this icon is "No New Mail".



This full mailbox icon indicates that that the incoming mailbox has messages in it that were received since the last time the mailbox was accessed. The hint for this icon is "You have mail". All new messages will play the New Mail sound file you selected on the setup page.

## ***Setting up Email***

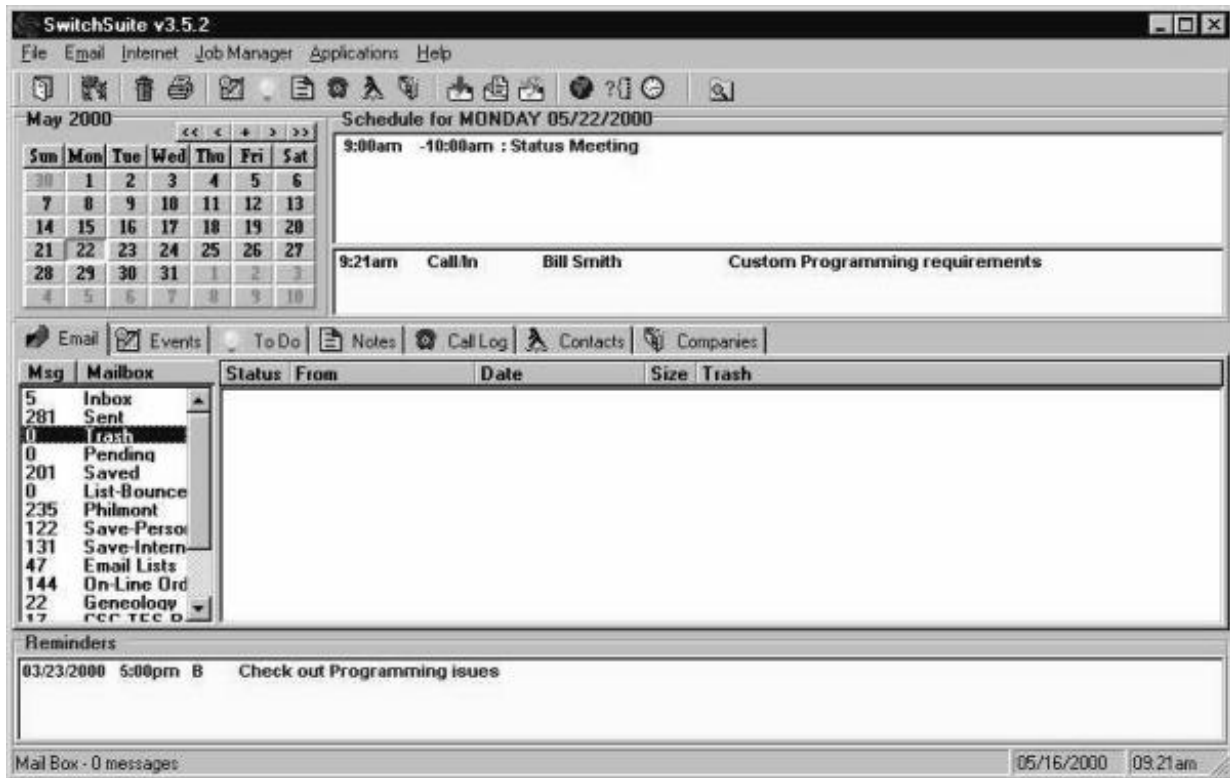
On the menubar select Email/Setup/Network Info and fill in all the information. Then select the Options button and fill in your options. This will allow you to send and receive email from SwitchSuite.

To add a new mailbox, select Email/Mailboxes/NewEdit. The Mailbox ID is the filename used to store the mail messages, the Description is what appears on the Email tab mailboxes list. The filter rules allow mail to be automatically deposited in that mailbox when received from the mail host. For example, if you belong to the SwitchSuite mail list, you might check the To: button and enter SWSUITE-DEV in the text box. This would put all mail addressed to SWSUITE-DEV in that mailbox.

## **Release Information**

Current Release version is 3.5.2.

## The SwitchSuite Tabs



SwitchSuite™ is a personal information manager that also has Internet capable applications. Features include an event scheduler, to do tasks, notes, call log, contacts and companies. The Internet functionality includes an email client, web browser, FTP client, News Reader, Time Agent, Finger client, and Who Is client. Each part will be described in detail on the following pages.

## Menu Bar

The Menu Bar provides access to several parts of SwitchSuite and is broken down into several functional groups: File, Email, Applications, and Help.

File Email Internet Job Manager Applications Help

### File

#### New

Schedule - Schedule a new event

To Do Task - Add a new task to do.

Note - add a new note

Contact - add a new contact

Company - add a new company

Call - log in a new call

Open - Open the Highlighted item in a list.

#### Save

Search - search in Events, Notes, Calls, To Dos for a matching keyword.

Change Current User - change to a different user or add a new user

Setup - setup SwitchSuite network information and user options.

#### Print

Schedule

Purge Schedule - purge events from the schedule.

To Do

Notes

Contacts

Companies

Call Log

Print Setup

#### Exit

### Email

Mailboxes - create new mailbox, or change existing ones.

Get Mail from Host - retrieve mail from POP3 host.

Compose new Email - create message and send to SMTP host.

### Internet

Web Browser - launch the web browser selected in setup.

FTP Client - launch the internal FTP Client

Whols - check InterNIC registration for domain information

Time - get the time from a network time server.

### Job Manager

Jobs

Tasks

Print Log

### Applications

### Help

Help Contents

On-Line Help

Register SwitchSuite

System Information

About SwitchSuite

## **Toolbar Buttons**


The Toolbar Buttons provide quick access to the most often and commonly used parts and actions of the Desktop. Each is identified by an icon that initiated the action by a single click of the left mouse button. If the icon is grayed out, that function is not available for the currently active process.




 Exits SwitchSuite.

 SwitchSuite Setup

## Desktop Functions

 Schedule a new Event.

 Create a new To Do item.

 Create a new Note.

 Create a new Contact entry.


 Create a new Call Log entry.

 Create a new Company Entry.

## Email Functions


 Download Email from the Host server.

 Create a new Email Message

 Send pending mail.

## Internet Functions

 Launch the Web Browser.

 Runs the internal FTP.

 Runs Whols.

 Time Agent.

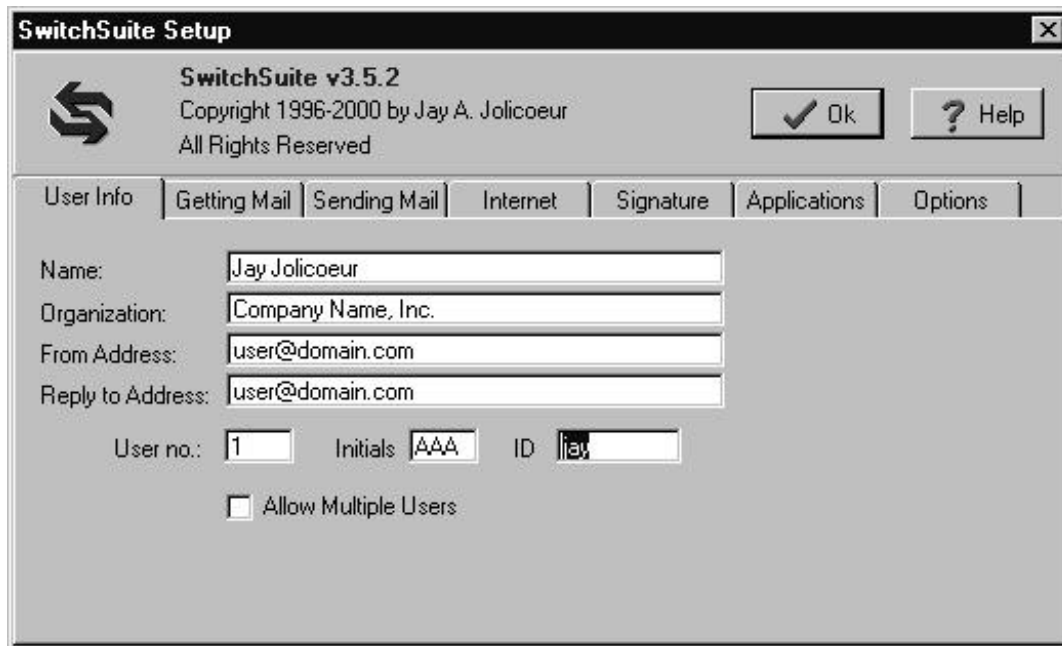
## **SwitchSuite Explorer**

While the Desktop Calendar tab is displayed and the initial size of the Desktop is increased, or the Desktop is maximized, the SwitchSuite Explorer is displayed below the Desktop Calendar tab. From this display you can run any program by double-clicking on it.

## SwitchSuite Setup

Before the internet components of SwitchSuite can be used, information about the internet host and program functions must be setup. To change setup information after initial startup, select *File/Setup* from the Desktop Menu.

### User Info



The screenshot shows the 'SwitchSuite Setup' dialog box with the 'User Info' tab selected. The dialog has a title bar with 'SwitchSuite Setup' and a close button. Below the title bar is a logo and text: 'SwitchSuite v3.5.2', 'Copyright 1996-2000 by Jay A. Jolicoeur', and 'All Rights Reserved'. There are 'Ok' and 'Help' buttons. The 'User Info' tab is active, showing fields for Name, Organization, From Address, Reply to Address, User no., Initials, and ID. The 'Allow Multiple Users' checkbox is unchecked.

Tab	Getting Mail	Sending Mail	Internet	Signature	Applications	Options
Name:	Jay Jolicoeur					
Organization:	Company Name, Inc.					
From Address:	user@domain.com					
Reply to Address:	user@domain.com					
User no.:	1	Initials:	AAA	ID:	jay	
<input type="checkbox"/> Allow Multiple Users						

**Name** - this is the same name entered in the *Change Current User* dialog when the user was added. It is the users full name and will appear in the header of all email.

**From Address** - the address that appears in the email header "From".

**Reply to Address** - the address that appears in the email header "Reply To".

**Organization** - the name of the user's company or organization. This will appear in the email header "Organization".

**User no** - the default is 1. This is used if there are multiple users of SwitchSuite on one PC and the data entered (events, notes, etc.) are not to be visible by other users.

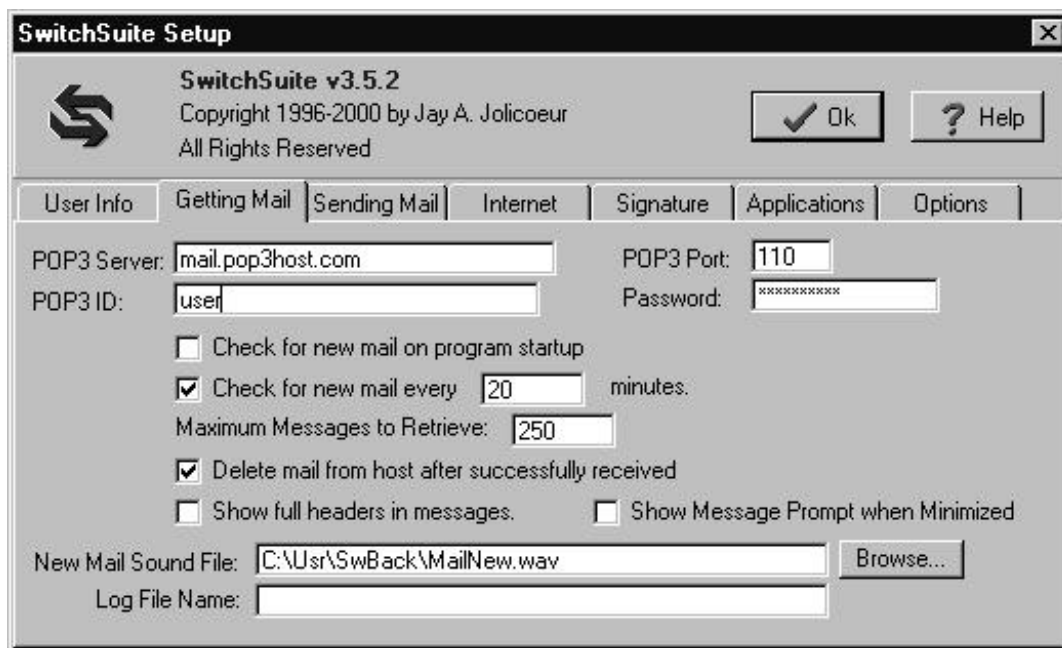
**Initials** - the 3 character initials of the user. This is not used by SwitchSuite but by other Switchback, Inc. programs that can be used with SwitchSuite.

**ID** - the user ID, this is also the subdirectory where all the SwitchSuite information is kept for this user.

**Allow multiple users** - allows multiple users to use this program on the same PC and keep separate information, including email. Requires each use to setup email network information and options. If checked, will prompt for a user ever time SwitchSuite is started, defaults to the last active user. Each user must have a different User no.

## Getting Mail

This information is required to establish connection to the internet host machine for the user's email account.



The screenshot shows the 'SwitchSuite Setup' dialog box, version 3.5.2, with the 'Getting Mail' tab selected. The dialog includes a logo, copyright information (1996-2000 by Jay A. Jolicoeur), and 'Ok' and 'Help' buttons. The 'Getting Mail' tab contains the following fields and options:

- POP3 Server: mail.pop3host.com
- POP3 Port: 110
- POP3 ID: user
- Password: [masked]
- Check for new mail on program startup
- Check for new mail every 20 minutes.
- Maximum Messages to Retrieve: 250
- Delete mail from host after successfully received
- Show full headers in messages.
- Show Message Prompt when Minimized
- New Mail Sound File: C:\Usr\SwBack\MailNew.wav (with a 'Browse...' button)
- Log File Name: [empty field]

**POP3 Server** - the Internet host computer that stores email for the user, until this program retrieves it.

**POP3 Port** - the winsock port used to retrieve mail. Defaults to 110. This should not need to be changed.

**POP3 ID** - the user's email account id on the Internet host computer. This is the same POP3ID entered in the *Change Current User* dialog when the user was added.

**Password** - the user's POP3 email account password. It will not display.

**Check for new mail on program startup** - this option will automatically check the POP3 host computer for new mail when SwitchSuite is started.

**Check for new mail every x minutes** - if SwitchSuite will be running all the time, this option will automatically check the POP3 host computer for mail at the specified interval. If new mail has been received, the mailbox icon that appears on toolbar will fill up with mail and the hint will change to "New Mail".

**Maximum messages to receive** - this is useful in case you get a lot of mail messages and want to limit the number you download. 0 indicates to download all messages.

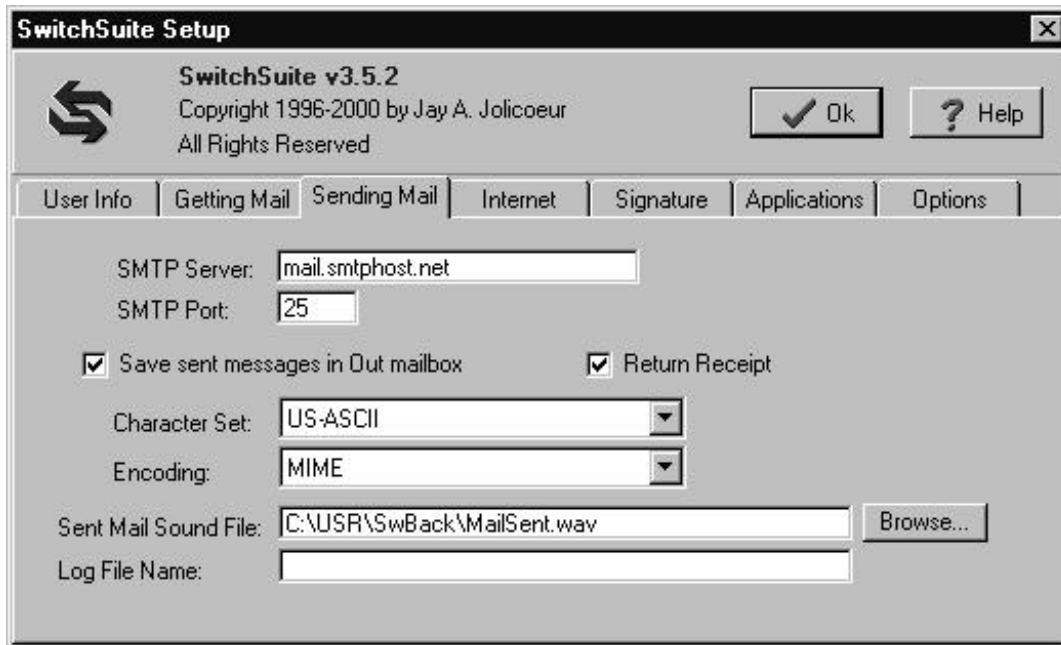
**Delete mail from host after successfully received** - when mail is retrieved from the POP3 host, checking this option will delete the mail from the host. If left unchecked, the next time mail is downloaded, the recently retrieved mail will be retrieved again.

**Show full headers in messages** - includes all message headers in the body of the email message when viewed. The default is to show only the message.

**New mail sound file** - you can select any .wav file to indicate when you have received new mail. There are a few included with this distribution of SwitchSuite. If left blank, no sound is made when new mail is received. Click on the Browse button to locate sound files.

## Sending Mail

Setup for sending mail via the Internet.



**SMTP Server** - the Internet host computer that is used to distribute mail to other email accounts.

**SMTP Port** - the winsock port used to deliver mail. Defaults to 25. This should not need to be changed.

**Save sent messages in Out mailbox** - will store a copy of any sent messages in the out mailbox.

**Return Receipt** - if checked, you will automatically get a message from the person you sent a message to when they receive it. This option can be over-ridden when sending mail messages.

**Character Set** - you can select one of 2 standard email character sets: US-ASCII or ISO-8859-1 the default is US-ASCII.

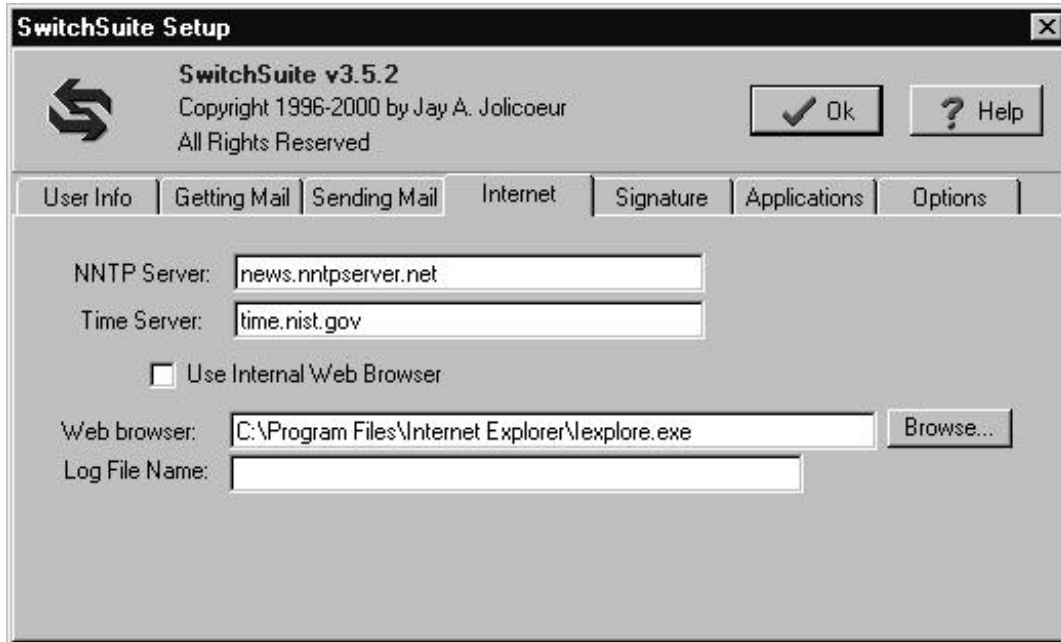
**Encoding** - you can select one of 2 standard ways to send attachments: MIME or UUCode, the default is MIME.

**Sent mail sound file** - you can select any .wav file to indicate that mail has been sent successfully. There are a few included with this distribution. If left blank, no sound is made when mail is sent. Click on the Browse button to locate sound files.

**Log File Name** - you can log all email transactions to a log file. Be aware that this log file will keep growing as you send and receive mail. You may want to check its size periodically. If left blank, no log file is created.

## Internet

These options deal mainly with the handling of email, but the setting up of multiple users and accessing a web browser. Most options just require a check to turn the option on or off. The default is for all options to be unchecked.



**NNTP Server** - the domain name or IP address of the host that you get news groups from.

**Time Server** - the domain name or IP address or the host you want to stay in time sync with.

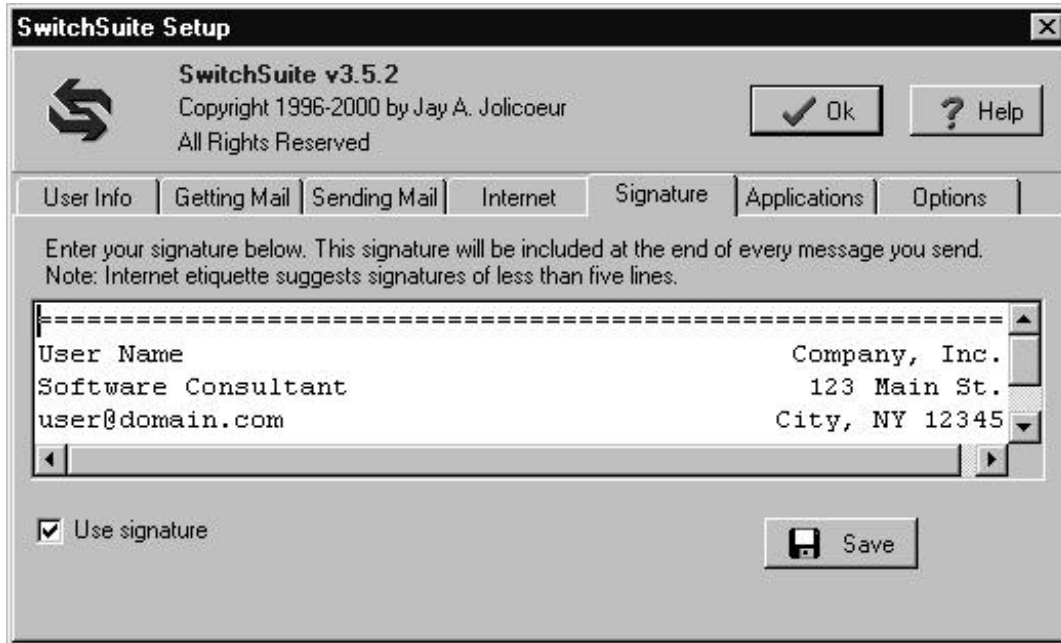
**Use internal Web Browser** - uses SwitchSuite's internal web browser (disabled in this release).

**Web browser** - the internal web browser it not used, this is the name (including full path) of the external web browser to use. Click on the browse button to search your system for a browser.

**Log File Name** - you can log all email transactions to a log file. Be aware that this log file will keep growing as you send and receive mail. You may want to check its size periodically. If left blank, no log file is created.

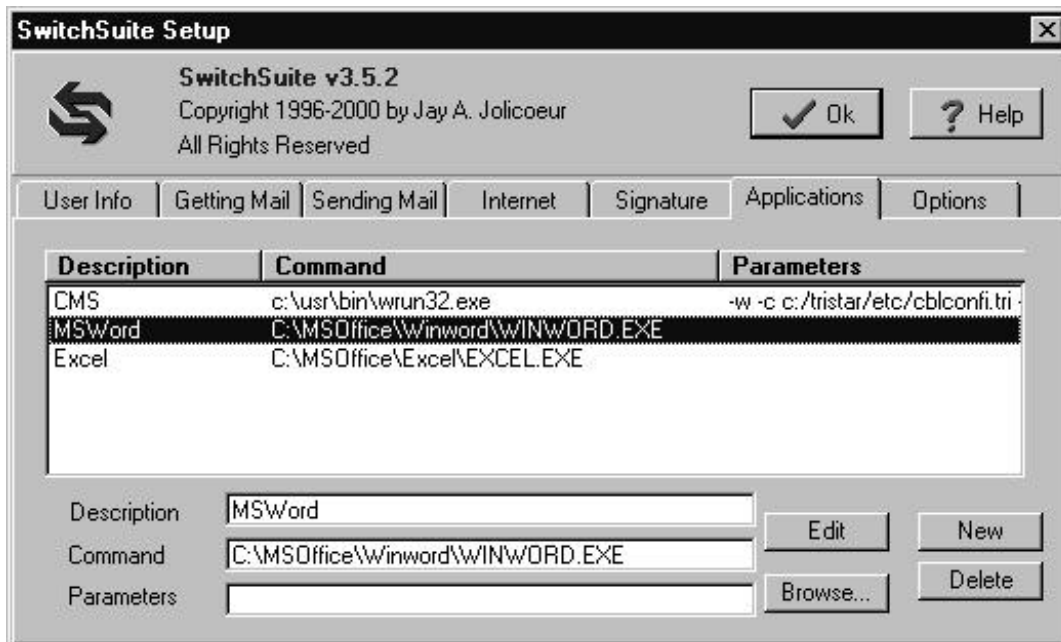
## Signature

This is message that is attached to the end of every email message you send if the *Use Signature* box is checked.

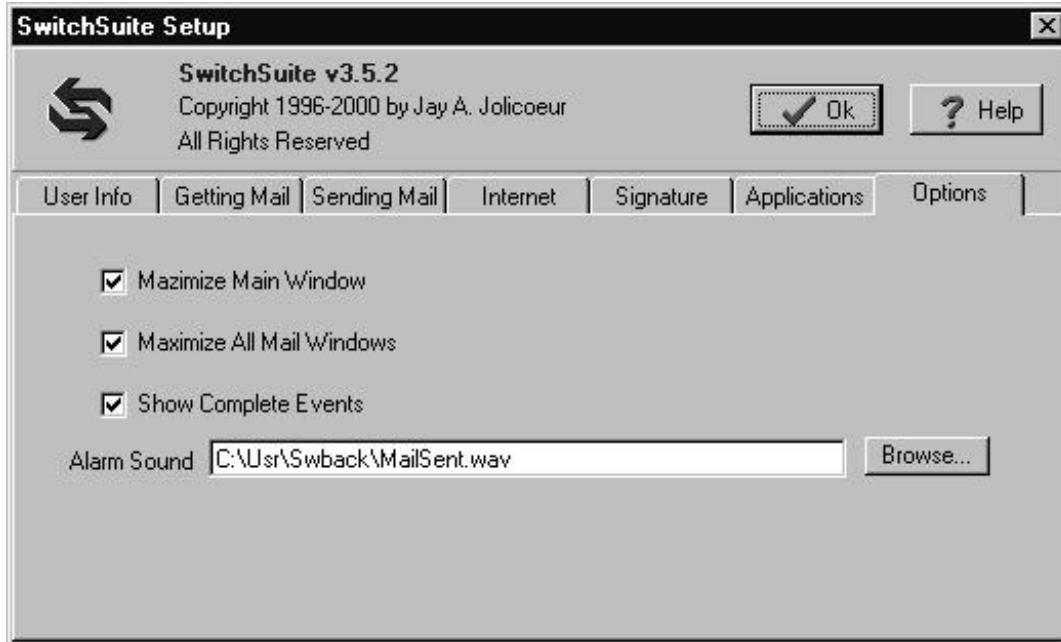


## Applications

These are the applications that will appear in the SwitchSuite menu bar under Applications.



## Other Options

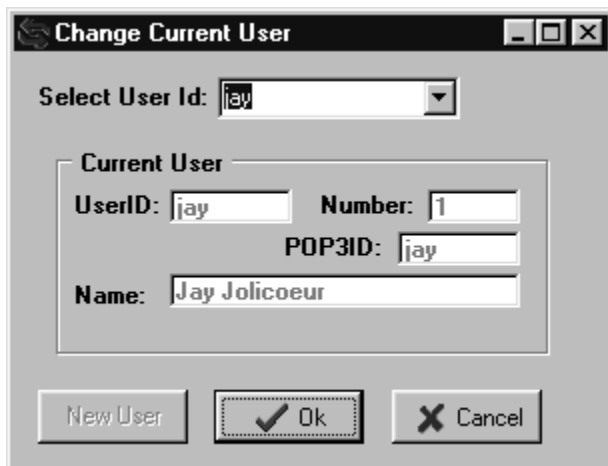


## Changing the Current User

SwitchSoft SwitchSuite allows multiple users on the same PC to keep separate information and access different email accounts.

The following dialog box is automatically displayed on program started the first time SwitchSuite is used and if the *Allow Multiple Users* option is checked as described above. To change the current user while SwitchSuite is running, select *File/Change Current User* from the Desktop Menu.

At initial runtime and when multiple users are allowed, all the fields are enabled for entry. If only single user access is selected, the information cannot be changed. Changes are allowed only when the *New User* button is active.



**UserID** - the 8 character identifier for this user. A folder is created under the SWSOFT folder using this name.

**Number** - the user number for this user. For single user systems, this should default to 1. On multiple user systems this can be any number up to 9999. It is used so that events, notes, todos, calls, contacts, and companies can appear only for the current user. If all users in a multi-user environment are to access the same data, keep this the number the same.

**POP3ID** - the user's POP3 account name on the host mail server.

**Name** - the user's full name.

## Calendar Tab

The calendar tab displays information about the date currently selected in the calendar control.

### *The Calendar*

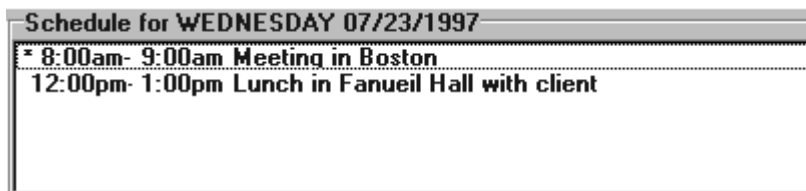
The Calendar at the top left of the Desktop controls the date dependent information that is displayed in each of the list boxes in the Calendar Tab - Schedule for today and To Do for today. Clicking on the Calls or Notes button will change the display in the To Do list box.



The current day appears indented and blue (on color screens). To change the Events and Notes listed for a given day, single-click on a day. Double clicking on a day will open a blank event entry screen defaulted to the day that was clicked. The previous and next month appear in gray, by single clicking on one of these dates, that month will fully appear.

To show the calendar for the month following the currently displayed one, press the button with >, to move forward one year press the >> button. Likewise, you can move back one month by pressing the < button and back one year by pressing the << button. To reset the calendar to the current system date, press the + button.

### *Schedule for Current Day*



This list is always displayed on the Calendar Tab. It shows all the events scheduled for the currently selected calendar date. What appears in this list is described in more detail in the section titled *The Schedule Tab*. Basically all that appears here are each event's starting and ending time and the description. Double-clicking on any event will display the event details. When an event has been marked as complete, an \* appears before the starting time.

### **To Do/Reminders for Current Day**

<b>To Do MONDAY 05/26/1997</b>		
<b>B1</b>	<b>SwitchSoft InfoSuite changes</b>	<b>Continuous</b>
<b>A1</b>	<b>TRISTAR Materials Inventory software issues</b>	<b>Continuous</b>

This is the default list that appears below the Schedule list on the Calendar Tab. It shows all To Do items due for this date and the priority. Double-clicking on a line will display the details.

### **Calls for Current Day**

<b>Calls for TUESDAY 02/18/1997</b>			
<b>9:45am</b>	<b>Out</b>	<b>John Janco</b>	<b>Returned his call of 2/17</b>

Clicking on the Calls button on the calendar will display any calls made on the current calendar date. The time of the call, whether it was Incoming or Outgoing, the person who called and the message description are displayed. Double-clicking on a call will display the call details.

### **Notes for Current Day**

<b>Notes for FRIDAY 05/30/1997</b>	
<b>2:38pm</b>	<b>TRISTAR OOL Testing</b>
<b>1:28pm</b>	<b>Hello</b>

Clicking on the Notes button on the calendar will display any notes made on the current calendar date. The date the note was entered and the description are displayed. Double-clicking on a note will display the note details.

## Schedule

The Schedule provides a way to schedule events.

### The Schedule Tab

Click on the Schedule Tab initially displays all the events scheduled for the next 2 weeks after the current Calendar date. Clicking on a month will display all the events scheduled for that month. Events can also be scheduled to appear daily, weekly and monthly as detailed in the next section.

Calendar								Schedule	To Do	Notes	Contacts	Companies	Email	Call Log								
Day	Date	Time	Event Description	Years	Year	Status																
WED	4/02	7:30pm	Soccer at YMCA		1997	Temp	▲															
SUN	4/06		Daylight Savings Time-Ahead 1 hr @2am			System																
MON	4/07	7:30pm	RP Lodge Business meeting		1997	Temp																
TUE	4/08	4:00pm	Soccer practice in Oakdale		1997	Temp																
WED	4/09	4:00pm	Soccer practice at Boylston Elementary School		1997	Temp																
WED	4/09	7:30pm	Soccer at YMCA		1997	Temp																
THU	4/10	7:00pm	Softball meeting at CRA - pick team		1997	Temp																
THU	4/10	7:30pm	Troop 175 Committee Meeting @ Wayne's house		1997	Temp	▼															
2 Weeks								Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Daily	Weekly	Monthly

#### System default days

These days are pre-defined in the SwitchSuite scheduler, they are indicated by the status *System*:

New Years Day	January 1
Lincoln's Birthday	February 12
Daylight Savings Time	First Sunday in April
Memorial Day	Last Monday in May
US Independence Day	July 4
Labor Day	First Monday in September
Columbus Day Observed	Monday closest to October 12
Columbus Day	October 12
Standard Time	Last Sunday in October
Halloween	October 31
Veterans' Day	November 11
Thanksgiving Day	Last Thursday in November
Christmas	December 25

The **Years** column denotes the number of years for Anniversaries and Birthdays from the year on the event to the current calendar date.

## **Scheduling an Event**

**Toolbar buttons** - Exit, New, Save, Delete, Print

**Month** - this is a drop-down combo box that has the 12 months plus Daily, Weekly and Monthly. When double-clicked on the Calendar, this will be the month from the Calendar. To select a different month, click on the down arrow button and select from the list. If Daily, Weekly, or Monthly are selected, the Type of event defaults to Recurring.

**Day** - this is the day of the month. Double-click on this box to display a calendar starting with the current date. To select a new date from the calendar, double-click on the day, or single-click and press ok. The month, day and Year will be automatically changed to the selected date.

For a **Daily** event, the day has no meaning and defaults to 1.

For a **Weekly** event, the day is the day of the week starting with Sunday (1) thru Saturday (7).

For a **Monthly** event, the day is the day of the month.

**Year** - for Temporary or Recurring events, this would be the current year. For Birthdays, Anniversaries, and annual events, this would be the year associated with that event - that way the event will "age" properly.

**Time of Day** - entered in hhmm format followed by am, a, pm, or p. For example enter 400a for 4:00am, or 1000pm for 10:00pm. When the field is exited, it is automatically formatted properly.

**Length (hrs)** - the length of the event in hours, e.g. 1.5 for 1 hour 30 minutes. If the event has no length, the default is 1.

**Alarm On** - this will turn on the alarm feature of the Schedule.

**Complete** - when the event is completed, check this off. Completed events appear on the Schedule for Today Calendar Tab with an \* on the line.

**Type** - the event can be one of the following types:

*Temporary* - this is the default for most events. These are events that occur only once and will be purged at the end of a year.

*Recurring* - events that happen Daily, Weekly or Monthly.

*Annual* - happen at the same time every year, e.g. April 15 Tax Day.

*Birthday* - this type will "age" according to the year entered, for example with an event year of 1960 and a current year of 1997, the age will be 37yrs.

*Anniversary* - same as Birthday, this type will "age".

**Description** - the description of the event, can be up to 60 characters in length.

**Comments** - this is a free-form comment associated with the event.

**Links** - events can be "linked" to other records in the data base to form "relationships".

## ***Printing the Schedule***

The following reports are found in the SwitchSuite file menu under *File/Print*.

### **Weekly Schedule**

This will print a schedule of events for a week beginning with Sunday.

### **Purge Schedule**

Will purge or just print all Temporary events for the selected year.

## To Do

This is to keep track of things you might need to do and assign a priority to it.

### *The To Do Tab*

Priority	Description	Status	For Date
B1	SwitchSoft InfoSuite changes	Continuous	02/23/1997
A1	TRISTAR Materials Inventory software issues	Continuous	03/05/1997

2 Weeks / Open / Complete / Canceled / All

### *Adding To Do Tasks*

**Description** - a short description of the To Do item, can be up to 56 characters.

**Priority** - the priority assigned to this item. Although it can be anything you want, any **A** priorities will always appear on the To Do for Today on the Calendar Tab.

**Status** - select one of the following status':

*Continuous* - Will always appear on the To Do for Today Calendar Tab.

*Open* - will appear on the To Do for Today list up to the Due Date.

*Complete* - a completed task. When checked complete, a completion date will appear.

*Canceled* - a canceled task.

**For** - this is the Due Date for the task.

**Alarm on** - will turn on the alarm feature.

**Alarm at** - if the alarm is on, will start the alarm the specified time.

**Alarm repeat every x mins** - once the alarm starts, will continue to repeat the alarm every x minutes until the alarm is turned off.

**Comments** - free form comments about this task.

**Links** - link this task to a Contact, Company, Event, Note, Call, or other Task

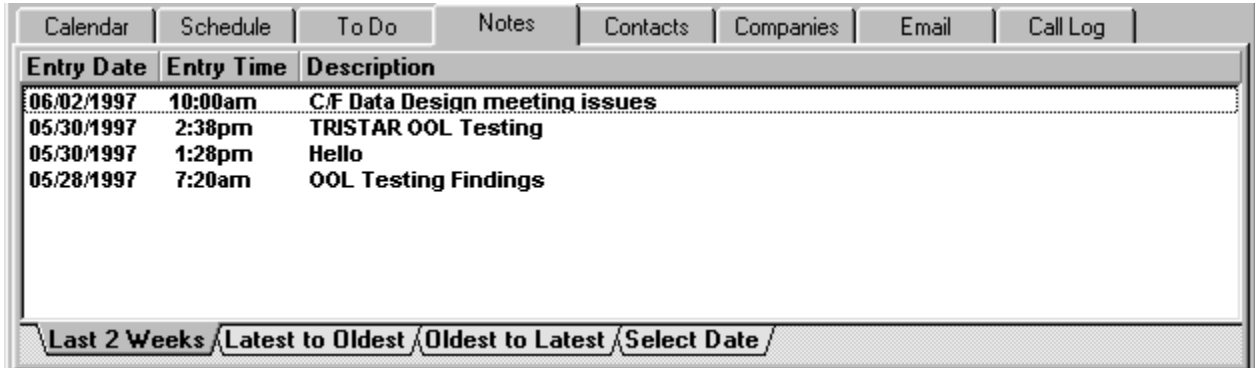
### *Printing the To Do List*

From the SwitchSuite file menu select *File/Print/To Do* or press the print button on the toolbar of the To Do detail screen.

## Notes

### *The Notes Tab*

Make a note about anything. You can make a note and then email it, or save email messages as notes then link them to contacts.



The screenshot shows a software window with a menu bar containing 'Calendar', 'Schedule', 'To Do', 'Notes', 'Contacts', 'Companies', 'Email', and 'Call Log'. Below the menu bar is a table with three columns: 'Entry Date', 'Entry Time', and 'Description'. The table contains four entries:

Entry Date	Entry Time	Description
06/02/1997	10:00am	C/F Data Design meeting issues
05/30/1997	2:38pm	TRISTAR OOL Testing
05/30/1997	1:28pm	Hello
05/28/1997	7:20am	OOL Testing Findings

At the bottom of the window, there are four buttons: 'Last 2 Weeks', 'Latest to Oldest', 'Oldest to Latest', and 'Select Date'.

### *Making a Note*

**Re** - this is a short description of the note. It can be up to 60 characters long.

**Type** - you can categorize notes by the following types.

*General* - the default note type.

*Email* - if you send a note as an email, or save an email as a note, it automatically defaults to this type.

*Postit* - will appear at the Alarm On time.

*Action* - same as General in this release.

*Accounting* - same as General in this release.

**Entered Date** - the date the note was entered, defaults from the current system date, it cannot be changed.

**Entered Time** - the time the note was entered, defaults from the current system time, it cannot be changed.

**For Date** - defaults to the Entered Date. This is used for Action notes, or when setting the alarm.

**For Time** - defaults to the Entered Time. Used to set the Alarm

**Alarm On x Mins before** - will start the Alarm x minutes before the For Time if the Alarm is turned on.

**Repeat every x Mins** - will repeat the Alarm every x minutes after the For Time if the Alarm is turned on.

**Comments** - free form comments about this note.

**Links** - link the note to Contacts, Companies, Events, Calls, To Do tasks, and other Notes.

**Send Button** - lets you send this note to any email address. It will bring up the Compose Mail dialog with the comments as the body of the message and the description (Re) as the subject.

**Duplicate Button** - lets you create a duplicate of the displayed note and changes the Entered Date and Time to the current system date and time.

**Save Button** - saves the note and returns to the desktop.

**Exit Button** - exits the note without saving it. If any changes were made to the new, or it is a new note, a prompt appears to save the note or exit without saving.

## ***Printing Notes***

From the SwitchSuite file menu select *File/Print/Notes* or press the print button on the toolbar of the Notes detail screen.

## **Contacts**

This is a full featured contact manager. In addition to the usual address and phone information about someone, the contact can be associated with a company. Each contact can also be linked to other contacts, companies, events, To Do tasks, calls, or notes.

### ***The Contacts Tab***

This tab displays contacts contacts alphabetically. The initial default is the A notetab.

Contact Name	Company	City	State	Title
Presley, Elvis		Nashville	TN	The King

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

### ***Contact Detail***

There is a lot of detail associated with a contact, most of which is self-explanatory.

Although you can link a call to a contact, the best way is to click on the phone button next to the Rep field and add the call. It is automatically linked to the contact entered on the Call screen.

## Companies

Companies are separate from contacts so you can associate several contacts with their company. Also contacts are used by other SwitchBack™ applications separate from contacts.

### *The Companies Tab*

Same as the Contacts Tab. Companies are listed alphabetically.

Company Name	City	State	Description
Fidelity Investments	Boston	MA	Client

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Companies can be added only by selecting *File/New/Company*, there is no company toolbar button.

## Calls

Calls are similar to notes, allowing you to keep detailed information particularly associated with a contact. Calls are denoted as incoming or outgoing and each is associated with a person. If the caller is not in the contact list, the name can be added directly.

### *The Call Log Tab*

Shows incoming and outgoing calls based on the selected notetab. The date used as a starting point is the current Calendar date. Pressing the Select notetab will display all incoming and outgoing calls. Calls are listed in descending order by date and time.

Call Date	Call Time	Contact	Description
05/30/1997	3:36pm	Jeff Legacy	Need to address some system issues

Past 2 Weeks In Past 2 Weeks Out Past 2 Months In Past 2 Months Out Select

## ***Call Detail***

**Call In/Out** - the default is In.

**On Date** - defaults to the current system date. This is the date of the call.

**On Time** - defaults to the current system time. This is the time of the call.

**Contact** - the person associated with the call. Press the contact button to get a list of contacts on the system. Double-clicking, or selecting a contact and pressing the Ok button will return that contact to the Call screen. If no contact is selected, a new contact can be added by clicking on the New button. The New button changes to View when a contact is selected.

**Phone no.** - the phone number of contact. If the contact was selected from the contact list, double-clicking on the phone field will list all phone numbers for the contact. Selecting one will display it in this field.

**Extension** - the phone extension of the contact. Must be a number.

**Type** - the phone type. This is a free-form description, but examples are home, car, work, etc.

**Description** - a short description of the call, can be up to 60 characters.

**Message** - details about the call itself. Free form.

**Contact Info** - if a contact was selected using the contact button, details about the contact appear in this tab. The information cannot be changed here.

**Links** - show and create links to other calls, notes, events, to do tasks, or contacts. If a contact was selected from the contact list, it is automatically linked.

## ***Printing The Call Log***

## Email

This is a full featured email system that complies with most RFC standards. There are 5 default mailboxes that cannot be deleted or have the order changed. The descriptions can be changed. These mailboxes are: Received (incoming mail), Sent (for copies of sent mail), Trash (all deleted mail), Pending (all mail not immediately sent), Saved (saved messages).

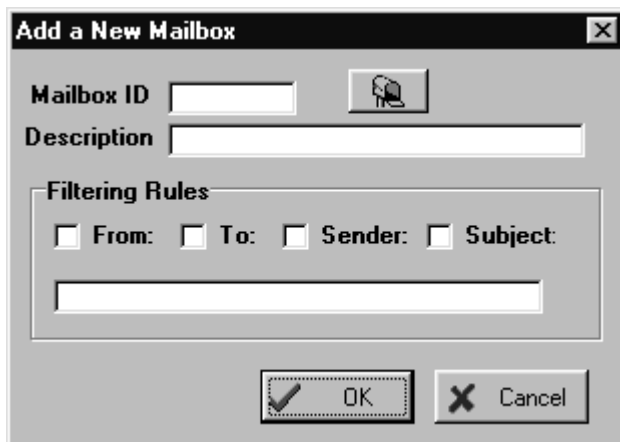
### *The Email Tab*

All mailboxes are displayed and single-clicking on one will display all the messages in that mailbox. Double-clicking on a message line will display that message. Clicking on a heading will sort the messages by that heading. The default sort is descending by date.

Calendar	Schedule	To Do	Notes	Contacts	Companies	Email	Call Log
Msg	MailBox	Status	From	Date	Size	List-Bounces	
1	Received	☐	"Jay Jolicoeur" <MAILEF	Wed, 04 Jun 1997 14:	3	Message rejected by system	
100	Sent						
39	Trash						
0	Pending						
104	Saved						
0	Bonsail						
0	ScoutsL						
1	List-Bounces						
5	Save-Personal						
25	Save-Internic						
7	Philmont						

### *Creating new Mailboxes*

All mail is stored in mailboxes. You can use just the default mailboxes, or create your own as well. Pressing the mailbox pushbutton will display a list of current mailboxes. Clicking on a mailbox will display its information in the dialog box and let you make changes to it.



The dialog box titled "Add a New Mailbox" contains the following fields and controls:

- Mailbox ID:** A text input field with a pushbutton to its right.
- Description:** A text input field.
- Filtering Rules:** A section containing four checkboxes:  From,  To,  Sender, and  Subject. Below these is a text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

**Mailbox ID** - the mailbox id is an 8 character name the system uses to create a file to store the messages.

**Description** - this is the mailbox name that displays on the Email Tab under the Mailbox heading. It can be up to 15 characters.

**Filtering Rules** - these rules are used when receiving new mail to automatically put new messages in this mailbox. If the description below the Filtering options matches something in any of the selections, that mail is deposited into this mailbox. This is helpful for email received from lists.

### ***Getting Email from Host***

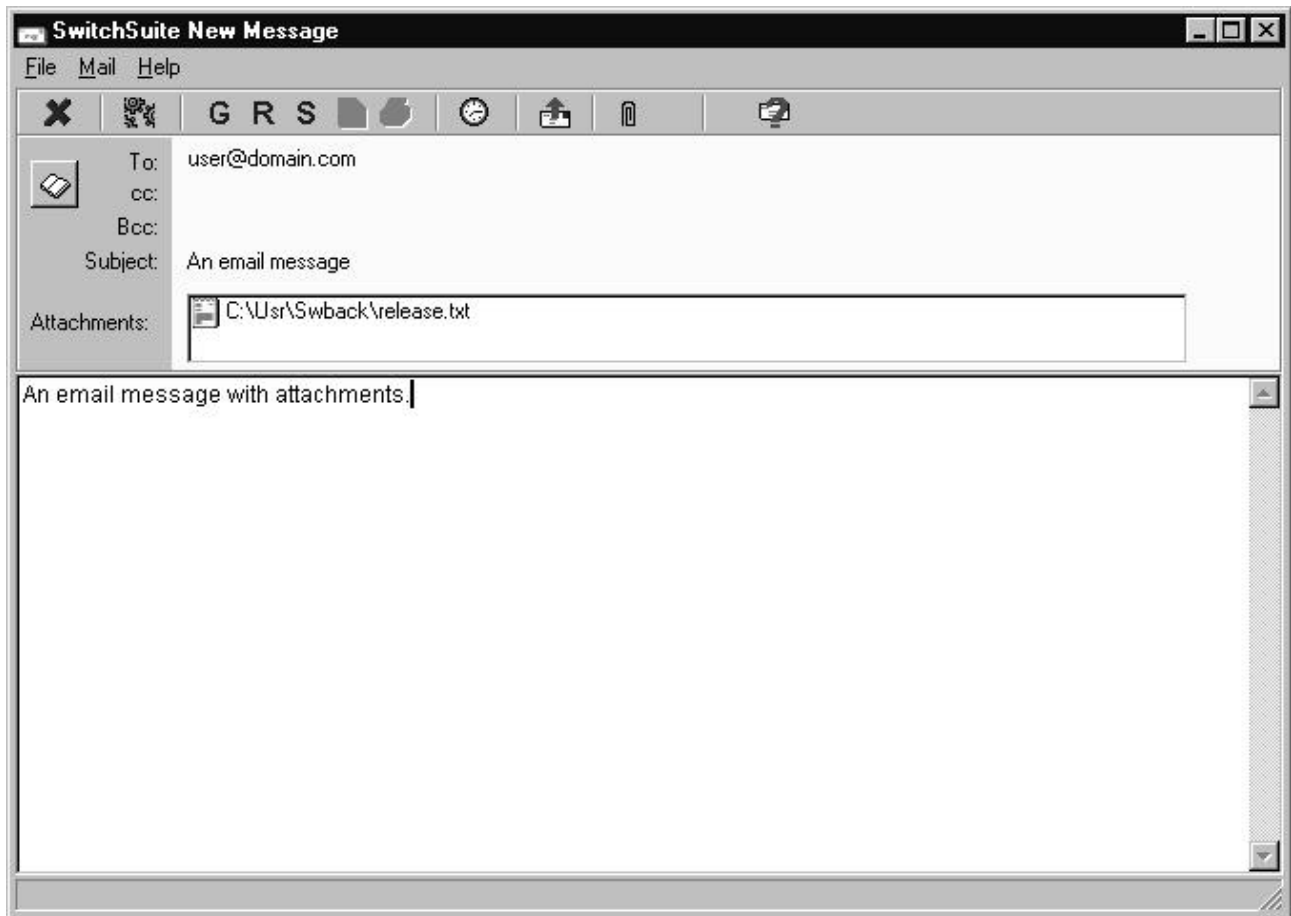
Email can be retrieved from the POP3 host by pressing the Download Email toolbar button described previously, or clicking on *File/Email/Get Email from Host*. All email is deposited in the Received mailbox unless filtering rules are setup for specific mailboxes.

The receive mail dialog box, shows you the total number of messages to be retrieved and which one it is currently downloading. It also shows you the subject of each message and the status of the message. You can stop receiving by pressing the **Stop** button which deletes all received mail and leaves the rest on the host. Pressing **Abort** will keep all messages on the host, including those already received.



## Composing an Email

To compose a new email message, click on the Create New Email toolbar button described previously, or click on *File/Email/Compose New Email*. When composing mail, the Get Mail timer is off.



### Entry Fields

**To:** - this is the email address of the primary person or persons to receive the message. Multiple address can be entered separated by commas.

**Cc:** - the email address(es) for a Carbon Copy recipient.

**Bcc:** - the email address(es) for

**Subject:** - the subject of the message. Appears on the header part of a mail client.

The message is entered freeform in the memo field below the attachments list.

### Buttons

**Address Book** - this will show all Contacts in the data base that have email addresses. Selecting a contact from this list will put the email address in the field the cursor was on when the button was clicked. Multiple address can be appended.

**Cancel** - end this New Message without sending it.

**Send Now** - send this message now. You must be attached to the Internet send mail now.

**Send Later** - puts the message in the Pending Mail box. It can be delivered by clicking on the Send Pending Mail button on the toolbar, or reviewing the message and forwarding it.

**Attachments** - lets you select files from your computer to send to the email addresses entered. These files can be any type and will delivered based on encoding you selected in setup.

### Check Boxes

**Signature** - if you added a signature in setup, it will be automatically be appended to the mail message. This will be checked/unchecked depending on the option selected in setup, but can be changed here.

**Return Receipt** - will send you a confirmation that the message was received by the recipients. This will be checked/unchecked depending on the option selected in setup, but can be changed here.

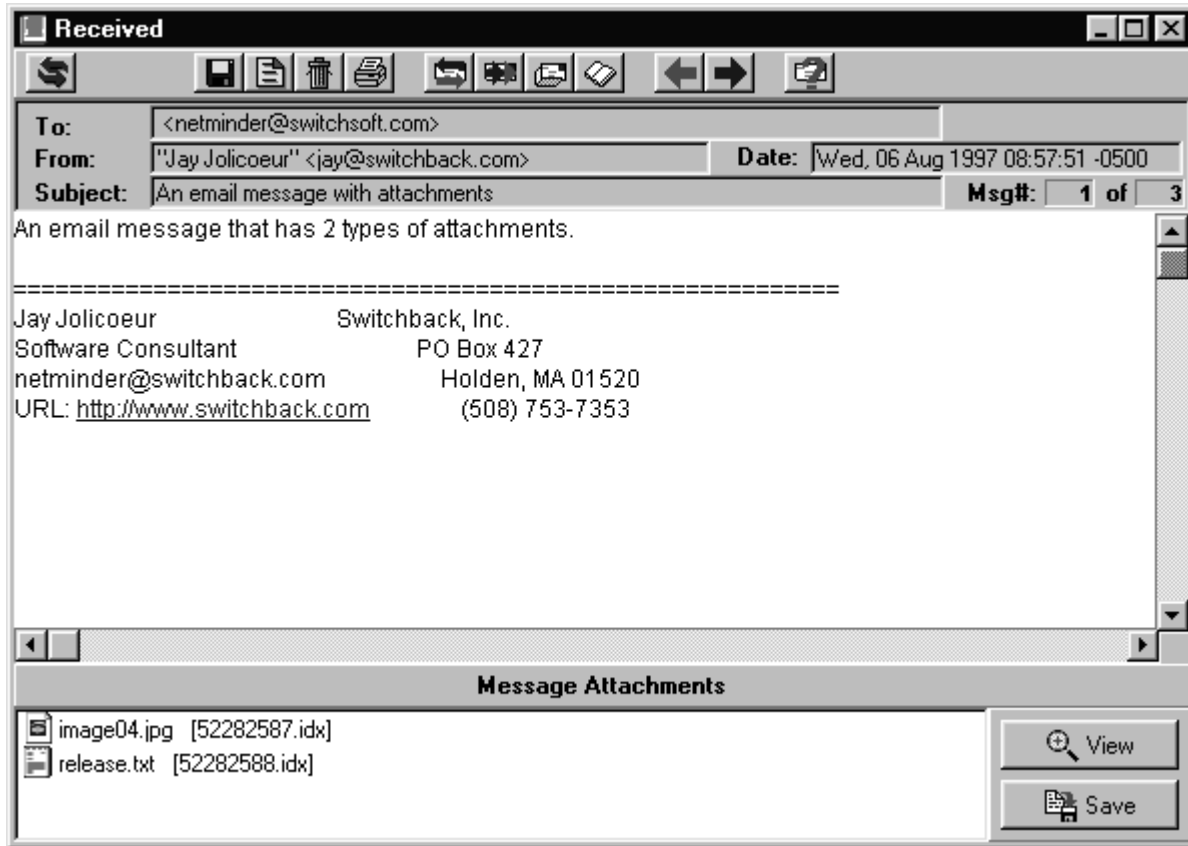
### ***Delivery of the Mail***

When mail is delivered the following dialog box appears.














## Viewing Email

Email is viewed by double-clicking on a message in the Email Tab.

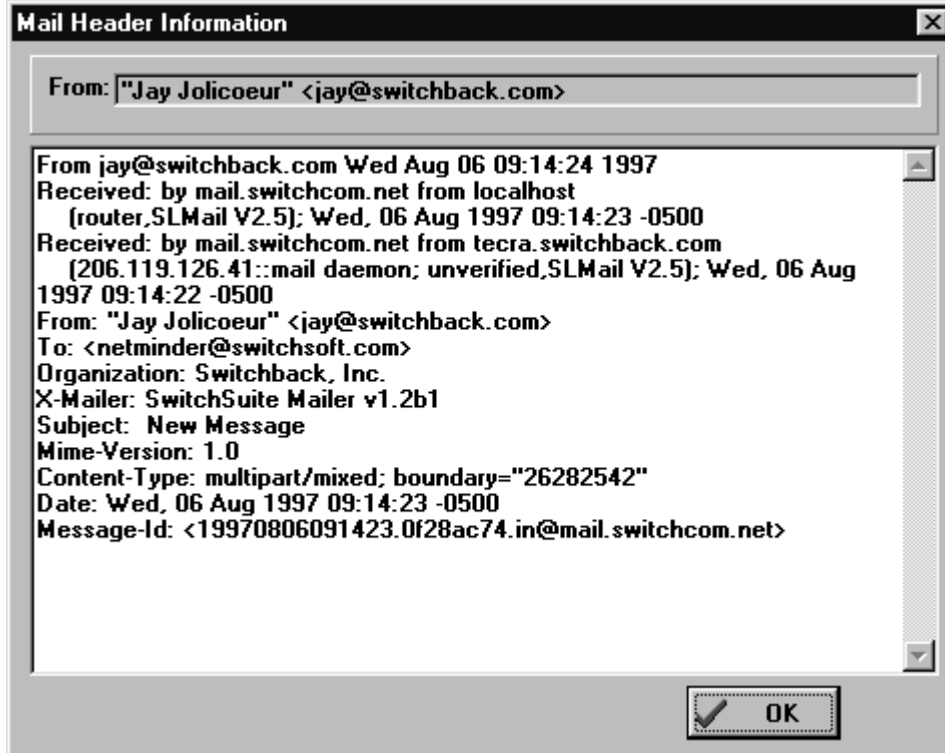


You can single-click on Any URLs that appear highlighted in blue and underlined to launch your Web Browser and go immediately to that site.

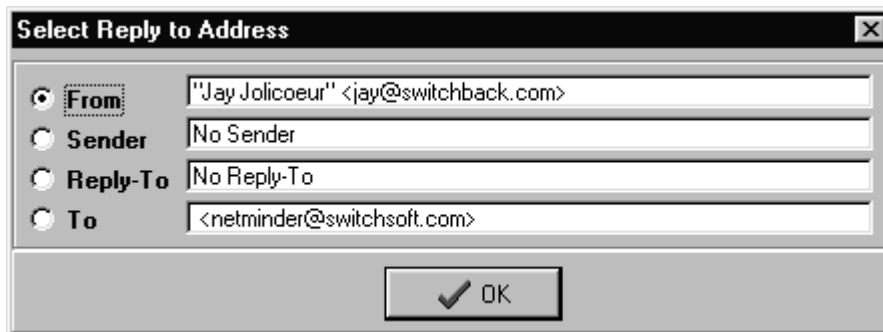
### The Toolbar Buttons

- |   |  |
|---|--|
|  Save the email message to disk.       |  Save the message as a Note.              |
|  Delete the email message.             |  Print the message.                       |
|  Reply to the sender of the message.   |  Forward this message to another address. |
|  Move this message to another mailbox. |  Save the From address as a contact.      |
|  Look at the previous message.         |  Look at the next message.                |
|  Shows the message's headers.          |  |

## Mail Header Information




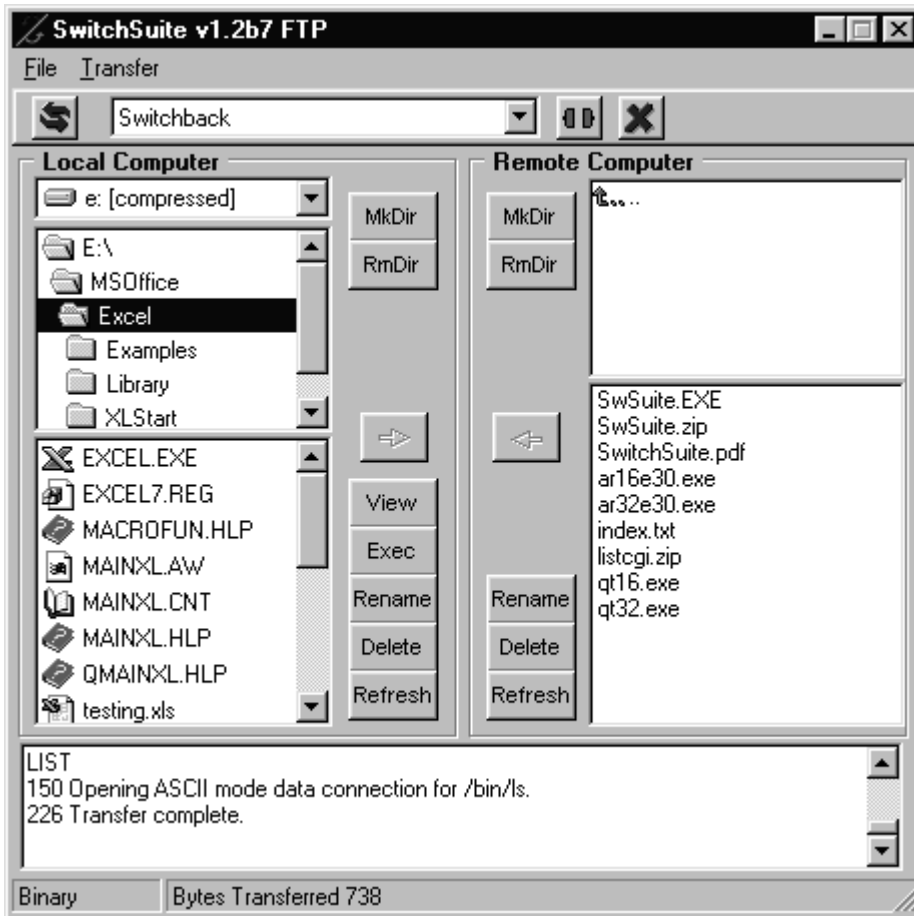
## Replying to an Email Message



## Other Internet Utilities

### FTP

An internal FTP client is included with SwitchSuite. To launch it, click on the  button on the toolbar.



To add a FTP site, click on File/Sites and enter the information as shown below.

Site Name	Remote Host
Switchback	

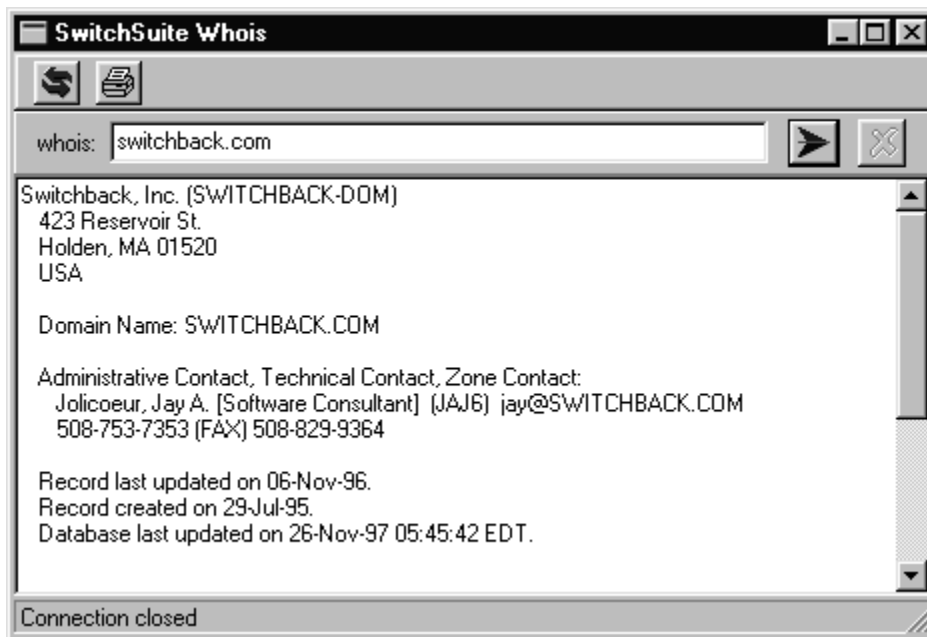
Site Name:

Remote Host:  Remote Port:

User Name:  Password:

## Whois

Checks the Internet database for the name entered and returns the information if found. Click on the printer icon on the toolbar to print the information.

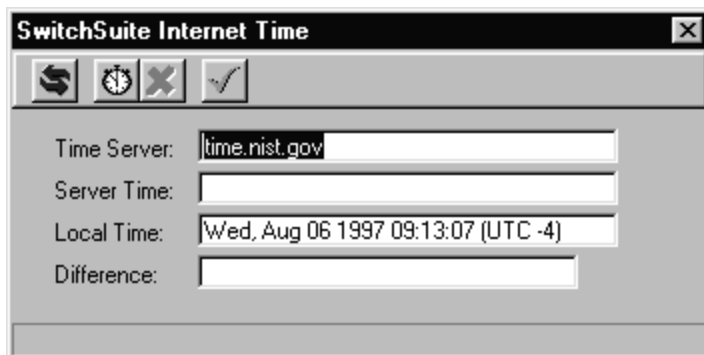


## Finger

Not available at this time.

## Check Time

This lets you check the time on an Internet host machine and reset your computer's time to that time.



## News Reader

Not available at this time.

# SwitchSuite Registration Form

If you plan to use SwitchSuite™ beyond the 30 day evaluation period, please fill out the registration form below and mail it to Switchback, Inc. You will receive back a registration key by email.

Name : \_\_\_\_\_

Company Name: \_\_\_\_\_

Address 1 : \_\_\_\_\_

Address 2 : \_\_\_\_\_

City : \_\_\_\_\_ State : \_\_\_\_\_ Zip Code : \_\_\_\_\_

Country : \_\_\_\_\_

Phone numbers:      Voice (    ) -  
                                    Fax (    ) -

E-mail address : \_\_\_\_\_

Registration Name as it appears on the SwitchSuite about box (be exact, case specific):

\_\_\_\_\_

Computer make and model : \_\_\_\_\_

Registration fee in US Dollars payable to Switchback, Inc.

<u>Qty</u>	<u>Description</u>	<u>Unit</u>	<u>Extended</u>
____	SwitchSuite	\$45.00	_____
	MA Residents 5% Sales Tax		_____
	Total		_____

Mail to: SwitchSuite Registration  
Switchback, Inc.  
PO Box 427  
Holden, MA 01520

\_\_\_\_\_  
Authorized Signature                      Date