

## **ESP User's Guide.**

# **E**lectronic **S**ales **P**rospecting

Published by HIT Software.

User's Guide

## **Contents**

1. About ESP
2. The ESP Database
3. Maintaining Your Contact Records
4. Using AmiPro with ESP
5. Using Word with ESP
6. Using WordPerfect with ESP
7. Using Write with ESP
8. ESP History Files
9. Syncromeshing
10. Import and Export
11. Customizing ESP

## **Limited Warranty**

HIT Software warrants that the software will perform substantially in accordance with the accompanying Product Manual for a period of ninety days from the date of receipt. Any implied warranties on the software are limited to ninety days or the shortest period permitted by applicable law, whichever is greater.

## **Customer Remedies**

HIT Software's entire liability and your exclusive remedy shall be, at HIT Software's option, either refund of price paid or repair or replacement of the software that does not meet HIT Software's Limited Warranty and which is returned to HIT Software with a copy of your receipt. This Limited Warranty is void if failure of the software has resulted from accident, abuse or misapplication. Any replacement software will be warranted for the remainder of the original warranty period or thirty days, whichever is greater.

## **No Other Warranties**

To the maximum extent permitted by applicable law, HIT Software disclaims all other warranties, either express or implied, including but not limited to implied warranties of merchantability and fitness for a particular purpose, with respect to the software, the accompanying product manual and written materials. The limited warranty contained herein gives you specific legal rights.

## **No Liability for Consequential Damages**

To the maximum extent permitted by applicable law, HIT Software and its suppliers shall not be liable for any other damages whatsoever (including, without limitation, damages for loss of

business profits, business interruption, loss of business information, or other pecuniary loss) arising out of the use of or inability to use this product, even if HIT Software has been advised of the possibility of such damages. In any case, HIT Software's entire liability under any provision of this agreement shall be limited to the amount actually paid by you for the software.

This agreement is governed by the laws of England.

## **Chapter 1 - About ESP.**

What is ESP?

Who uses ESP

Why Use ESP?

Learning to Use ESP

What Hardware will be Needed

The ESP Database

Contact records

History Files

Individual Correspondence

Label Generation

List Generation

Customising an ESP Database

Networking

Portable Computing

Pro-active Prospecting

Re-active Prospecting

ESP in Large Companies

The ESP Development Team

## **1.1 What is ESP?**

ESP stands for Electronic Sales Prospecting and we believe that it may be the most valuable software product that you will ever use.

ESP works at all levels. It is primarily intended for business use but it is equally suitable for personal or club use. It will operate on a stand-alone PC, multi-user networks and even portable computers synchronised with an office based system.

Prospecting for business is the most crucial activity that you undertake. It is costly and the results critically affect the health and profitability of your business.

ESP will give you the competitive advantage to convert more prospects to customers and improve customer loyalty. It maintains contact details, produces correspondence, tracks activities with your clients and prompts you to make timely follow-ups. It will help build a profile of each client, target your prospects and close more business.

If you already have information stored on other systems you can transfer it to ESP using one of several standard data formats.

ESP is advanced Windows software. It combines ease of use, compatibility with other Windows applications and a future guaranteed by the world's most popular software environment.

This chapter contains information that will help you get the best results from the software and improve your business success.

## **1.2 Who uses ESP.**

ESP is suitable for individuals, small businesses and large corporate users.

ESP is supplied with example databases for general prospecting, vehicle sales and service, estate agencies, club membership and personal use. These are ready to be used straight from the packet.

If your particular business or industry requires its own, specialised database it is easy to create a new one or modify one of the example databases. If you prefer; we, or one of our many Value Added Re-sellers can make the changes. You will be surprised how little this can cost.

### **1.3 Why Use ESP?**

ESP used at an individual or company level will improve performance, image and efficiency. For companies it can also help departments work more closely. It can significantly improve your clients' perception of you and your organisation.

Whether you are a multi-national corporation, a small business or an individual user, the essentials of good prospecting and customer relations are the same. Whatever products or services you sell, your customers and prospects want to feel that they are important to you.

When your clients choose you as their supplier, price, quality and availability are all important criteria but the personal relationship they have with you also plays a critical part in their decision.

Modern business is ever more competitive. It increasingly relies on customer-facing activities and added value through excellent service. To win more clients and retain those that you have, you must deal with them efficiently, know their needs and desires and build a good working relationship. This means you must collect and store information that is readily available when you contact them or they contact you. You will provide information to them by letters, quotes, telephone calls and visits. All these must be recorded, tracked and followed up at the appropriate times.

Anybody who is well organised can deal with a few clients easily using their memory and paper based records. However, as the number of clients grows and the workload increases, manual systems fail to perform. Appointments are missed, follow up-dates forgotten, letters and quotations are delayed and the client is left unimpressed.

ESP will help improve the quality of your client information, automate your ability to respond to your customers' requirements and increase the quality of the material they receive from you. ESP will help you build a complete profile on each of your prospects and customers.

ESP, will produce high quality printed material and personalised direct mail, using your favourite word processor.

As a business user with a network you can use ESP to change the whole character and personality of your company and its relationship with your clients. If required, different users can have different views of the same shared database.

## **1.4 Learning to Use ESP**

ESP has been designed to be clear, uncluttered and easy to use. Only functions directly appropriate to prospecting and client contact are included in the software. Every function in ESP has been carefully designed to be simple to understand and absolutely reliable in operation.

Compatibility with Microsoft Windows, the worlds most popular operating system, means that you will already know how to use many of the functions in ESP.

Sales prospecting can involve a certain amount of word-processing. Users who have already invested considerable time and money in learning to use a particular word-processor will not want to start again with a new one. ESP takes direct control of your favourite Windows word processor to provide the most advanced facilities available. Microsoft Word, AmiPro and WordPerfect are all supported. Users who don't have access to one of the third-party word-processors can use Write. Although it lacks sophisticated features, it performs very adequately.

ESP is supplied with several example databases that can be used while you are learning about ESP.

### **1.5 What Hardware will be Needed.**

ESP can run on any IBM compatible computer which is capable of running Windows 3.1 or higher.

The recommended minimum requirement is a 386 based PC with four megabytes of RAM although we have successfully tested it on a 286 based PC with one megabyte. This is very slow. The requirements of the Windows versions of Word, WordPerfect and AmiPro call for a 386 PC with four megabytes of RAM or better. A specification lower than this should only be considered if Write is the preferred word processor and your database is going to be small.

If you would like advice on the best hardware solution for your requirements, any of our many ESP re-sellers will be pleased to help. Alternatively, because we at HIT Software do not supply hardware, we will be pleased to offer impartial advice.



## **1.6 The ESP Database.**

You can have multiple ESP databases on your computer. This is particularly useful when you need, a supplier database, a personal database and customer database held separately on the same computer. Each database can be customised to suit your exact needs.

The database structure used by ESP is unique. It has more in common with databases used by large organisations such as banks and credit card companies than most PC based databases. A similar structure has been used for many years in our DOS based product. It has proved to be robust and speedy with databases containing tens of thousands of contact records.

An ESP database consists of contact records, history files, individual correspondence, form letters, label sheets, list templates and customisation files. Each of these items is discussed briefly in the following sections. They are covered fully elsewhere in this manual.

### **1.7 Contact records.**

Contact records contain information such as name, address, product interest, personal interest, company information, enquiry source and any other useful items appropriate to the particular database.

An ESP database can store five hundred thousand records. Each record is owned by a particular user and this ownership can be used to control subsets of the database. This allows different users to have their own contact records and for these to be part of a company-wide ESP database.

Each piece of information in a record is called a field. Fields can be of different types (free text, automatic pick list, numeric, telephone and date). New fields (up to a limit of about three thousand) can be created at any time.

In ESP, any of the fields can be used to find a particular record at a later date. The speed of response is very impressive. Searches of a single field work at about two thousand contacts per second. This is easily fast enough for a big database to be used for live telesales activities.

The selected records are displayed using a browse list of the information most useful to you. The list can be sorted using any of the fields in your database. The whole of a single record can be displayed at the touch of a button and you can view the history notes (see below) simultaneously.

## **1.8 History Files.**

Each contact record has its own history file in which you can track all your activities with your clients. ESP automatically adds notes and dates when letters are produced. You can add your own information such as telephone conversation notes, things to do, results of visits you have made and so on. For common entries, a pick list is available. You can assign a different follow-up date-time to each entry you create. Special search facilities in ESP allow you to select records using the follow-up date-times stored in the history files.

Each history file can contain up to sixteen thousand entries and each entry can contain up to two thousand characters of free text.

The entries in the history files are available to the ESP list generator for the production of call reports and other useful print-outs using your word-processor.

For smaller companies with no special accounting software, the combination of word-processor and history files is an ideal way to produce invoices and track them for payment. The follow-up dates will identify any late payments and these can be acted upon with a series of standard letters or by telephone.

## **1.9 Individual Correspondence.**

ESP can be used for the production of individual letters, invoices, quotations, etc. For simplicity, these are referred to as individual letters. ESP manages the generation of individual letters and looks after their storage and retrieval for you. It names them and automatically hands over all the field information required by your word-processor.

Each record in your contact list can be 'parent' to four thousand individual letters.

Mail-Merging with Form Letters.

Form letters are used for mail-merging. Each ESP database can have a library of form letters for regular use. ESP manages the production of mail-merges. A mail-merge can be generated for a single record or a selection of records. ESP automatically hands over all the field information required by your word-processor.

Each database can store up to four thousand form letters.

### **1.10 Label Generation.**

Mailing labels are produced using a label sheet and your word-processor. Each ESP database can have a library of label sheets for regular use. ESP manages the production of labels. Labels can be generated for a single record or a selection of records. All the field information required by your word-processor is handed over automatically.

The example databases provided with ESP contain label sheets for Avery, the worlds most popular labels.

Each database can store up to four thousand label sheets.

### **1.11 List Generation.**

Lists and reports are produced using list templates and your word-processor. Each ESP database can have a library of list templates for regular use. ESP manages the production of lists and reports. Lists and reports can be generated for a single record or a selection of records. All the field information and history file data required by your word-processor is handed over automatically.

Each database can store up to four thousand list templates.

### **1.12 Customising an ESP Database.**

ESP provides functions for changing screen views, changing the ESP menu, adding and deleting fields, modifying the way a field works, changing the order for data entry, modifying pick-lists, etc. Any modifications you make are stored in special files which, in turn, are stored in the database for future use.

### 1.13 Networking

The ESP has been designed, from the outset, with networking in mind. One of the most important design requirements was that multiple users on a network of computers should be able to access a common database simultaneously.

The Lite version of ESP has no networking capability and will not access network drives.

The full version of ESP will operate with large, server-based networks or smaller peer-to-peer networks. If required, the full version of ESP can be installed on the network for shared use by workstations but this increases network traffic. Unless there are other considerations, all network workstations should use the full version of ESP installed on the local disk of each workstation. Note that an ESP licence is required for each workstation. Multi-user user licences are available from your dealer or HIT Software.

The following table summarises the capabilities of each of the versions.

	Lite	Full
Runs From Local Drive:	Yes	Yes
Local Drive Databases:	Yes	Yes
Runs from Network Drive:	No	Yes
Network Drive Databases:	No	Yes



### **1.14 Portable Computing.**

A particularly useful feature of ESP is synchromeshing. This allows the effective use of a single database on multiple computers which are not permanently connected.

ESP invisibly encodes special synchromesh signals with each field of each contact record, each entry in each history file, each individual letter and all the other files stored in a database. When two ESP computers are connected together, these signals can be used by the synchromeshing option to ensure that two separate databases have the latest information.

If required, the synchromeshing can be limited to records owned by a specified user. An example of this in action would be an office based system containing the complete contact database with salespeople using lap-top computers containing only the contact records for their area. When salespeople connect to the office system, only their own records are synchromeshed.

Very few rival systems have any equivalent to synchromeshing and the few advanced systems that do are normally content with overwriting one complete record with another. This may be adequate for word processing files but is very poor for a typical sales prospecting database. ESP synchromeshes on individual fields. It provides the highest level of data integrity between the portable and office based systems.

### **1.15 Pro-active Prospecting**

What is pro-active. Any time you contact a customer or prospect you are being pro-active. You are taking the initiative and seeking out the business.

The upside to being pro-active is that it shows that you want the business. You have made the effort to get in touch. You have the advantage of choosing when to make contact and you will have made time to be well prepared for any eventuality. However, it is unlikely that you will always make contact just at the time that the business is available. Your pro-active work lays the foundations for you to get in touch again at the right time. It also encourages your clients to contact you when they are ready and allows you to collect good intelligence about your customers needs and desires. When they are ready to buy, you will be very well prepared.

ESP helps you to be efficiently pro-active by providing all the functions necessary to collect and store information about your contacts. You can retrieve it and use it later when the time is right.

For instance, many companies will have found mail-shots yield poor results. This is because, without accurate targeting, the mail-shot lacks appeal for the majority of the recipients. The temptation is then to mail-shot very large numbers in order to compensate for the poor response that is expected. This, in turn, becomes impossible to follow-up effectively. This is expensive, de-motivating and inefficient.

ESP can turn your mailshots into 'Direct Mail'. By direct mail we mean targeted letters. ESP encourages you to build a profile on each contact. The contacts can then be selected either manually, by viewing the records and history information or by using ESP's comprehensive search facilities. With accurate targeting, you can aim for quality rather than quantity. The letters you send will have far more appeal for their recipients and you can easily follow-up by phone, visit or subsequent mailings. You will find that costs are reduced and results are improved. You will be far more motivated to use the technique again.

'Direct Mail' is only one aspect of being pro-active. Telephone canvassing, advertising, customer visits, blitzes and all your other pro-active activities will be improved by ESP.

### **1.16 Re-active Prospecting.**

Reacting to customers is often difficult. ESP will greatly improve your ability to respond to your customers' inquiries.

When a prospect or customer gets in touch, you are immediately in an advantageous position. They have taken the time to contact you. They obviously want something. If you respond in the right way, you are several steps closer to getting the business. However, without care, you can lose this advantage. Unless you have total recall, you may well ruin a good selling opportunity by not being as well informed about them as they expect. Even with your most familiar customers it can be easy to make a slip and forget some vital bit of information. Worse still, you may not be available and some other person in your office has to deal with the urgent enquiry.

With ESP all the information is immediately available to help you make the sale. If you are not in the office, your colleague has a chance to show how well organised your company is and may even get the business for you.

Which ever way you look at it, both you and the customer win.

ESP allows multiple access to the same database even from the same computer. Imagine you are in the middle of producing 'Direct Mail' when you receive an in-coming call. You can open a second window into the same database and look up any details you require. Your original work remains unaffected in its own window.

ESP allows up to nine database windows to be open simultaneously on each computer. A special menu option tracks them and lets you switch to any of them at the touch of a button.

### **1.17 ESP in Large Companies.**

As we have said before, ESP can be used on many levels and we have described many of the obvious advantages.

When used on a company wide system ESP has all the same benefits. In addition, other more subtle advantages come into play.

ESP will help each department work more closely by sharing information. Every point of contact in your company can have its own access to your ESP database. This allows each department to share and input information in a controlled fashion and provide a personalised, total quality service to your clients.

As an example, with such a system the telephonist takes incoming calls and identifies if contacts are in the database. ESP's fast search facilities allow this to work effectively. If contacts are already on the database, all their details will be available and can be used as appropriate. If not, the details can be taken. When the call is put through to another department, all the details will be available on their screen.

Your customers may have contact with more than one department within your company; for example sales and service. The sharing of information will allow each department to work more efficiently and impress your customers with their total knowledge of their dealings with you.

As a manager you may use the system to monitor what is happening with all your company's clients. The comprehensive nature of the database will let you work more strategically and be more responsive to the needs of your customers.

By linking your staff in this way, it will allow a much better use of resources. Variations in the work load can be more easily accommodated.

### **1.18 The ESP Development Team.**

ESP contains many sophisticated and well designed features. Like all good products it combines initial ease of use with the long term ability to live up to and exceed your expectations.

Each function in the software has been designed to be absolutely reliable and predictable in operation. Our company has fifteen years of software development experience. A great deal of feedback from users has been used to develop the software and we are confident that you will appreciate the time and care that has been taken to produce ESP.

We take great pride in knowing that many businesses and individuals rely on ESP and enjoy using it. Our customers have faith in our product and we do our very best to live up to that hard earned trust. We hope you enjoy using the software and find it an invaluable tool in your work.

We will be happy to hear any comments that you have to make about ESP. In particular we want to know about any difficulties that you have had with the documentation. Bending our ears about them will help you let off steam and help us get it right for future users.

If possible, please provide your comments in writing and indicate that you will allow them to be used as product endorsements if appropriate. Adverse comments have got no chance of getting into print (unless they are really funny) but they will be used in a constructive way to improve the software wherever possible.

If you would like more information about how ESP can help with your company's particular requirements, please contact HIT Software on (++44) (0)252-522995, PO Box 2, Farnborough, Hants, GU14 0NF, England.

## **Chapter 2 - The ESP Database.**

### ESP Database Components

#### Multiple Databases

#### Creating a New ESP Database

#### Deleting ESP Databases

You cannot travel very far in the information technology world without coming across the word 'database'. It means different things to different people. We take it to describe a collection of facts or notes of any kind that have been assembled to form a foundation for future activities.

An ESP database can hold facts, notes and other items related to your contacts.

## **2.1 ESP Database Components.**

### **Contact Records.**

Each of your contacts will have a contact record. In it you store frequently needed items such as names, addresses, telephone numbers, etc. Each item is stored in its own separate field. In other words, a record consists of a collection of fields. ESP contact records are described fully in a later chapter of this manual.

### **History Files.**

Each of your contacts will have a history file. An ESP history file can contain up to sixteen thousand entries. Each entry is date-time stamped and consists of a note and an optional action date-time. ESP history files are described fully in a later chapter of this manual.

### **Individual Correspondence.**

Each ESP database can store items of correspondence such as letters, invoices, quotations, etc. Each item is individually linked to its 'parent' contact record. For simplicity, items of correspondence are referred to as individual letters. You create them and edit them using your word-processor. This is a powerful feature of ESP. A typical ESP database will contain thousands of contact records each of which can be parent to an unlimited number of items of correspondence. ESP allows you to locate a particular item quickly and easily. Individual letters are discussed fully in the appropriate word-processing chapter of this manual.

### **Form Letters.**

Each ESP database can hold a collection of form letters. You create form letters using your word-processor. ESP can then organise mail-merges using (1) the form letter of your choice and (2) information from your contact records. Form letters are discussed fully in the appropriate word-processing chapter of this manual.

### **List Templates.**

Each ESP database can hold a collection of list templates. As with form letters, you create list templates using your word-processor. ESP can then organise list-merges using (1) the template of your choice, (2) information from your contact records and (3) information from the relevant history files. The ESP listing functions can be used for the production of simple lists or complex activity reports. The choice is yours. List generating is discussed fully in the appropriate word-processing chapter of this manual.

### **Label Sheets.**

Each ESP database can hold a collection of label sheets. As with form letters, you create label sheets using your word-processor. ESP can then organise label generation using (1) the sheet of your choice and (2) information from your contact records. Label generation is discussed fully in the appropriate word-processing chapter of this manual.

### **Configuration Files.**

Each ESP database can hold a collection of configuration files. These control the screen views, the options available to pick-list fields, the options available for insertion into the history files, the menu options for searching the contact records, etc. ESP can function without configuration files. It uses defaults. You can easily change the configuration files using functions provided within ESP.

## **2.2 Multiple Databases.**

If you wish, you can have more than one ESP database on your computer. Each database can be customised to suit different activities with different fields in the contact records, different form letters, different list templates, different label sheets, different screens for viewing the contact records and even different menu options for searching the contact records.

ESP is supplied with a number of example databases. These serve several purposes. They demonstrate the versatility of ESP. They provide newcomers with a learning platform. They can be used as patterns for the creation of new databases.

**Warning!** You should not use the example databases for live data. The example databases differ slightly from new databases that you create in that they can easily be deleted to make room on your computer. Ordinarily, ESP will only allow you to delete an entire database if it has been properly backed-up



## **2.3 Creating a New ESP Database.**

When you feel that you have learned enough about ESP to start using it in anger you will need to create your own database and, possibly, customise it to your needs.

The File/New Database option will accomplish this for you. The location and form of the new database that you create are controlled by a single dialogue box that is described below.

### **The Pattern List-Box**

The new database must be modelled on one of the in-built patterns or a database that already exists on your system. These are listed in the pattern list-box so that you can high-light the one required.

### **The Drive List Box.**

Any suitable drives visible to Windows and ESP are listed in this box. Choose the one you require.

Note that Network Drives are not visible to the Lite version of ESP.

### **The Name Control.**

You will have to make up a name for the new database. It must not contain more than eight characters. The first character must be a letter. The remaining characters can be letters or digits.

### **The Description Control.**

You should type a description of the new database into this control. The description will help you to identify the database later.

### **The OK Box.**

When you have specified everything required you can press the enter key or single-click the OK box to start the construction process. When the new database has been created you can access it with File/Open. You can then delete any fields that you do not need and create any new fields that you do need. You can adjust the record-editor mask to display the new fields and any other text required and you can adjust the way the browse list is displayed. You can change the menu options for searching the contact records and you can extend or change the entries available for pick-list fields. This is all covered in later chapters of this manual.

## **2.4 Deleting ESP Databases.**

It's unlikely that you will need to delete databases on a regular basis but it may be necessary from time to time.

The menu option to delete your current database is in the Tools menu. It will delete all the field files, all the history files, all the correspondence files and any other files belonging to the database.

Because this is such a dangerous function it will only work if the database you want to delete has been successfully backed-up and not touched since.

Warning! The example databases provided with ESP can be deleted without being backed-up.

You can back-up a database using the MS-DOS back-up command, the Microsoft Backup application (supplied with MS-DOS 6) or any other proprietary product that you trust.

## **Chapter 3 - Maintaining Your Contact Records**

Finding and Viewing Records

Record Ownership

Transferring Record Ownership

Creating New Records

Copying Existing Records

Entering Data into a New Record

The Record Editor

Global Operations

Selecting the Records you Need

Disk Based Selections

Excluding Records From Your List

Selection with Group Information

Sorting your Selection

Deleting Records

The Record-Editor Mask

Changing the Browse-List View

Creating New Database Fields

Changing Field Parameters

Deleting a Field

Editing a Field Pick List

### **Maintaining Your Contact Records.**

One of the main functions of ESP is its use for storing and retrieving details of your contacts. The main details, for example name and address, are stored in a database record. Each of your contacts will need it's own record in the database. A database record consists of a number of fields. Each field holds a piece of information such as initials, surname, company name, address, etc.

The ESP database is also used for storing other items such as history files, individual correspondence, form letters, label sheets, list templates, individual letter templates, screen views, pick-lists, etc. These are explained in other chapters. The purpose of this chapter is to help you understand the management of your contact records.

This chapter also contains a few simple exercises that will help you gain experience and clarify the points made in the text. Even if you do not try them, we recommend that you read through the exercises.

### 3.1 Finding and Viewing Records.

There will be many occasions when you need to find a particular contact in your database. Perhaps you need to write a personalised letter and put some information into the appropriate history file. Perhaps one of your customers has phoned you and you want to bring yourself up to date by having a quick look at their details and history file.

#### **The Very Easy but Tedious Way.**

This method works well if you have less than a dozen or so records in your database but otherwise it has little to recommend it. However, we do advise you to try it if you are unfamiliar with the browse-list and the record editor.

The Contacts menu has a Select All option which selects every record in the database. You simply click on this option and you will be presented with a browse-list that you can scroll through with the mouse or up-down keys until you spot the person you want.

The Browse-list usually displays the title, initials, surname, company and telephone fields but this can be customised to suit your particular needs.

When you spot the contact you want you can double-click on their entry. This will bring up the record-editor. If you are working in a large window, you should see most of the important details that have been entered for the contact you have chosen.

#### **Using the Quick-Find Options.**

The contacts menu has three quick-find options. They are usually titled Find by Surname, Find by Company and Find by Post-Code but, again, this can be customised so that other fields are searched. Each option works in the same way. You will be presented with a dialogue box asking you to enter the surname, company, post code or whatever it is that you want to find.

When you enter your text, every record in the database will be examined and if the content of the appropriate field matches your text then the record will be selected. If one or more records are selected as a result of the search, you will be presented with a browse-list. If the list is long, you can scroll through it with the mouse or up-down keys until you spot the person you want. If the search failed you will be informed with a disappointingly matter-of-fact dialogue box.

As above, when you spot the person you want you can double-click on their entry to bring up the Record Editor.

#### **Example:**

*Use **Contacts/Select All** to have a quick look at the first few records in your database. Note the surname of one of them.*

*Click on Find by Surname in the Contacts menu and enter the surname you have chosen.*

*If all goes well you should get a browse-list showing the contact you have chosen and any other contacts with the same surname.*

#### **Wild Cards.**

You can use wild-card characters (stars and question marks) when you specify the text you want to find. The question mark stands for any single character and the star stands for any group of characters.

#### **Example:**

*If you want to find all your records with the word 'print' in the company name field you could enter \*print\* as the text you want to find.*

*If you want to find all the records with post-codes starting with 'A' you could enter a\* as the text.*

*The text ?\* could be used to find all the records with at least one character in the company name field.*

### **Ranges.**

Ranges are specified using > (greater than), < (less than), >= (greater than or equal to) and <= (less than or equal to).

Ranges are particularly suitable for use with numeric fields and date fields. They also work well with normal fields where one piece of text is considered to be greater than another if it would come later in an alphabetical list.

### **Example:**

*Imagine that you have a numeric field in your database and you want to find all the records that have a value in that field less than 1000. You would enter <1000 as the text you want to find. If you wanted to find all the records that have a value greater than or equal to 1000 but less than 2000 you would enter >=1000<2000 as the text you want to find.*

*You could select all your records with post-codes that come before 'MA' in an alphabetical list by entering <ma as the text to be searched for in the post-code field.*

*Imagine that you have a 'last purchase date' field in your database and you want to find all the records with a 1993 date in that field. You could enter >=1 Jan 93 <=31 Dec 93 as the text you want to find.*

### **Using a Filter to Find Records you need.**

The filter is the most powerful mechanism for selecting the records you need. It is designed to help you build selections for mail-shots and lists, etc. It is described fully in Finding the Records you Need later in this chapter. Here we describe how it can be used to help you find a single record if neither of the simpler methods are suitable.

### **Specifying the Fields you want to Search.**

The filter dialogue box allows you to specify the names of up to three fields that you want to be examined. If you only need to use one field then leave the other two controls empty.

### **Specifying What you want to Find.**

Each field name box has an edit control next to it in which you can enter the text you want to find. If the field is numeric you must type a number or range. If it's a date field you must type an unambiguous date or range of dates.

### **The Owner Control.**

Every record in the database notionally belongs to one of the users of the database. If you wish, you can enter your user identity code into the owner edit control and check the **Owned Records Only** box. This will limit the search to your records.

### **The Method.**

There are three radio buttons that allow you to choose how you want the filter to work. The first button (the default) tells the filter to forget any records you have already selected and asks it create a new selection by searching the whole database. The next button tells the filter to add any matching records it finds to the ones you have already selected. The third radio button restricts the filter so that it only searches records that you have already selected.

### **How the Filter Works.**

When you click the OK button or press the enter key the filter examines each record required (see above) and determines which records pass and which fail. If you have specified an owner identity code then records that do not belong to you will always fail. A record will fail if the text

you have entered does not match the contents of the corresponding field. If a record passes all the tests you have set it is added to your selection.

As with the quick-find options, if one or more records are selected as a result of the filter, you will be presented with a browse-list.

**Example:**

Use **Contacts/Select All** to have a quick look at the first few records in your database. Note the surname and post-code of one of them.

Click on **Filter** in the **Contacts** menu. Specify that you want to find the surname you have chosen in the surname field and the post-code you have chosen in the post-code field. Make sure that the discard current selection radio button is highlighted and the owner control is clear. Press the enter key or click on the OK box.

If all goes well you should get a browse-list showing the contact you have chosen. It is unlikely that you will have selected any other records with the same surname and post-code.

### **3.2 Record Ownership.**

Every record in your database is owned by one of the database users. It is impossible to create a new record in the database without supplying the three character owner identifier.

Company users frequently choose to use the sales-person's initials as the owner identifier but any scheme that suits your needs can be used.

Record ownership is vitally important if you intend to use the ESP syncromesh facility. Syncromesh is described fully in a later chapter. It allows you to maintain the same database on two or more, unconnected computers. Every so often, you connect the computers concerned and syncromesh the database on one with the database on the other. Typically, a company will maintain a master database on an office based computer and several sub-sets of the master database on lap-top computers. There is usually no need for a lap-top user to have other users' records in their databases. The owner identifiers are used to limit the records (and history files, individual correspondence, etc.) that are examined and modified when the syncromesh takes place.

Whenever you create a new record, you will have to supply an owner identifier for it.

### **3.3 Transferring Record Ownership.**

If necessary, you can change the three-character owner identifier of a record. There is a menu option **Contacts/Global Operations/Change Ownership** that allows you to change the ownership of your current record or your current selection if required.



### **3.4 Creating New Records.**

There is an option in the contacts menu that allows you to create a new record. When you create a new record a dialogue box will allow you to specify your user name and if you want company fields copied from the current record.

Every record in an ESP database belongs to a user. Users are identified with three letters, usually initials. You must specify a valid three-letter user identifier before the dialogue box will be accepted.

### **3.5 Copying Existing Records.**

Sometimes you will want to make a copy of an existing record and change a few of the details. This is usually what you would do if you are entering three contacts working for the same company.

For this reason, some of the fields in the your database be marked as company fields. They are marked in this way to indicate that you want them to be copied when you create a new record. Usually, the company name field, the address fields and the telephone number fields are marked as company fields.

If you check the Copy Company Details check-box then the new record will be created and the company fields will be initialised with information from the corresponding fields of your current record.

N.B. The current record is the record in the browse-list that has the flashing caret. It is the same record that you would view if you switched to the record editor using the menu or ctrl+R.

### **3.6 Entering Data into a New Record.**

When your new record has been created ESP will show it using the record editor and you will be able to enter the required information. The record editor is described in the next section of this chapter.

### **3.7 The Record Editor.**

To modify the details of a record you will need to be looking at the record with the record editor. Having found the record you need you can switch to the record editor with View Record Card in the contacts menu or pressing ctrl+R on the keyboard. If you are looking at a browse-list you can switch to the record editor by double-clicking on the entry you want to modify.

The record editor fills your whole window. It has a small window for each field on view. It usually has descriptive text to give you extra information. If necessary, the record editor will scroll up and down but it does not scroll sideways (the horizontal scroll-bar has a different purpose that is described later).

#### **Moving Around in the Record Editor.**

Mouse users can move the flashing caret to a different field by single-clicking on the required field with the mouse. The tab key moves the caret to the next field and shift+tab moves it back to the previous field. The enter key can be confusing. It usually performs the same action as the tab key but if an entry order file has been loaded (see below) the enter key steps to the next field in a user-defined list. This can be very useful for data entry.

#### **Changing the Contents of a Field.**

You can enter and modify the contents of the field that has the flashing caret by using the keyboard and mouse. You can cut, copy and paste the contents of fields using the clipboard functions in the edit menu. What you can enter depends on the type of the field. You can find out the type of a field by double-clicking on it. The different field types are listed below.

#### **Free Text Fields.**

Any character and any character plus auto-upper-case fields are free text fields. You can type any characters in these fields. The total number of characters is limited by the size of the field. You can find out the size of a field by double-clicking on it. Telephone number fields are also free text fields. They are not where you enter your next year's salary. They are for telephone numbers which need a special field type of their own so that the ESP dialler can recognise them.

#### **Numeric Fields.**

You can attempt to enter any characters into a numeric field but if they cannot be interpreted as a number they will be displayed and stored as zero.

#### **Date Fields.**

There are three kinds of date fields. Date (or native), long-date and short-date. You can enter date fields in a variety of ways and if what you have type can be interpreted unambiguously it will be accepted. Otherwise you will be presented with a dialogue box asking you to try again.

Incidentally, date fields are always stored in the same way using eight digits (yyyymmdd). Long dates and short dates are displayed in different forms that are controlled by the international section of your windows set-up.

#### **Pick-list Fields.**

ESP uses a Windows list box to let you pick the contents of a pick-list field. When a pick-list field has the focus you can step through the possible options using the up and down keys or you can open up the list with a single-click of the mouse. There are other cunning things you can do with list boxes. These are described in full in your Windows documentation.

#### **Saving the Changes you have Made.**

No special action is needed to ensure that the changes you have made are stored on your disk.

Any changes you make to a field are automatically stored when you move to a new field or change to another function.

**Changing the Record on View.**

If you have selected more than one record you can change the record that you are viewing with the horizontal scroll bar at the bottom of the window. The function keys can also be used as follows:

- F5. Fast traverse backwards.
- F6. Traverse backwards by one record.
- F7. Traverse forwards by one record.
- F8. Fast traverse forwards.

### **3.8 Global Operations.**

You can change the contents of fields globally in one go. There are four methods available from the **Contacts/Global Operations** sub-menu. They can operate on your current selection or every un-deleted record in the database. This is controlled by a check box. Because the operation can cause serious mayhem in your database you will be asked to confirm your decision before the operation takes place.

#### **Global Set.**

This function will set the contents of a particular field to a value that you supply.

#### **Global Clear.**

This function will clear the contents of a particular field.

#### **Global Append.**

This function appends text to the contents of a particular field. It cannot be used for date fields, numeric fields or pick-list fields. If the content overflows, data at the start of the field will be discarded to make room for the new data.

#### **Global Find and Replace.**

This function works in much the same way as find and replace in your word processor but it works on the contents of a particular field.

If it is used for date fields, numeric fields or pick-list fields then the text you want to look for and the text you want to replace it with must both be valid entries.

There are check boxes so that you can control whether case is important and whether the search will work on whole words only or parts of words.

### 3.9 Selecting the Records you Need.

The idea of creating a selection of records is crucial. Mail-merges, label generation and list generation work with your current list of records. You will often need to select records so that you can make a global change to the contents of a field. If you think of the records in your database as a giant box of cards, then your current selection consists of the cards you have taken from the box and have in a pile in front of you. There are many different ways to add records to (and subtract records from) your list.

#### The Quick-Find Methods.

We have already discussed find by surname, find by company name and find by post-code from the contacts menu. They are not particularly powerful for building selections but should not be ruled out altogether.

#### The Filter Methods.

The filter option in the contacts menu can be used to select records from scratch, to filter an existing selection or to add records to an existing selection. In addition, it can be set up so that it only selects records owned by you. Because it can work on three fields at the same time, it can be used as a very fine tool to pick up exactly the records you need.

#### History File Action Dates.

History files are discussed in a later chapter of this manual. All you need to know at this stage is that each record in your database can have its own associated history file and that history files can contain multiple action date-times. The **Find by History Action Date** option in the contacts menu can examine these date-times and select records that fall within limits that you set. When you select the option you will be presented with a dialogue box that is described below.

#### The Minimum and Maximum Action Dates.

There are two digital date-time boxes in which you can set the limits of the action times that you want to find. They are controlled by mini-scroll-bars and even have a week-number control. Each can be switched off if required. If they are both switched off then any records that have active action date-times will be selected. If the minimum control is switched off then the selection is limited by the maximum control. If the maximum control is switched off then the selection is limited by the minimum control.

#### The Owner Control.

If you specify your three-character user identity in the owner control and check the **Owned Records Only** box then the function will only find records that belong to you. Records belonging to other users will be ignored.

#### Discard.

There are two radio buttons that control whether the function looks at the whole database or just the records that you have already selected.

### **3.10 Disk Based Selections.**

You can load a selection that you have previously saved to a file on your disk. The selection file does not contain any data at all. It is simply a list of references that can be used to decide if a record in your database is selected.

The function is accessed with disk-based selections from the contacts menu. You will be presented with a standard dialogue box for choosing a file. Choose the file you want and the selection will be made.



### 3.11 Excluding Records from your List.

There are a number of methods that you can use to exclude records from your current list. Excluding a record does not delete it. If we use the box of record-cards analogy we would say that excluding a record is the same as taking its card from the pile and putting it back into the box.

The various methods available to exclude records from your selection are listed below.

#### **Excluding your Current Record.**

This option simply removes the current record from your list. If practicable, the next record becomes your current record. The current record is the record with the flashing caret in the browse-list. It is the same record that would be shown if you access the record editor.

#### **Excluding Preceding/Subsequent Records.**

Preceding records are records that come before the current record in the browse-list view. Subsequent records are records that come after the current record.

These options can be very useful if used with selections that you have previously sorted. Sorting your selection is discussed in the next section of this chapter.

#### **Excluding Tagged/Un-tagged Records.**

Tagged records are records that have a tick next to them in the browse-list. You can tag/un-tag a record by single-clicking on its entry in the browse-list. There are also menu-options for setting and clearing tags.

This option is particularly useful for tidying up a selection you have made using other methods.

#### **Excluding Non-Group Members.**

Groups are discussed fully in a later section of this chapter but there is an option in the exclude sub-menu to exclude non-group members. It removes records that do not belong to the same group as your current record. There are other functions in the **Contacts/Groups** sub-menu that select records using their group information.

#### **Excluding with a Filter.**

The excluding filter is similar to the including filter. It allows you to specify up to three fields that you want examined and what you want to be searched for in the fields. You can also specify an owner name.

It is important to remember that a record will only be excluded if it passes all the tests you have set.

#### **Example:**

Choose **Contacts/Exclude/Exclude with a Filter** from the main menu.

*Specify that you want the fields surname and company searched and specify that you want m\* to be found in the surname field and a\* to be found in the company field. Make sure that the third field controls are blank and that the owner control is blank.*

*Press the enter key or click on the OK box. Any records that have both surnames beginning with a and company names beginning with m will be removed from your list.*

### **3.12 Selection with Group Information.**

If required, you can arrange your database records into groups. You have complete control over how you do this. The facility is often used so that any customers that work for the same company belong to the same group. The creation of groups is discussed later in this manual.

Probably the most useful function in the **Contacts/Groups** sub-menu is the cryptically named make current group into current selection. In one go it removes any records that do not belong to the same group as your current record. At the same time it adds any other records that belong to the same group as your current record. In this way you can easily select all the people in a company with whom you have contact. If the person you need is not there when you call, you have instant access to what you need to know about the other contacts.

### **3.13 Sorting your Selection.**

When you have selected the records you require it is probably useful to put them into alphabetical order. In computer terms this is known as sorting.

If you are doing a mail-merge, generating a list or generating labels for any more than a few records you will almost certainly want to sort your selection first.

The ESP sort does not affect the database at all. It simply changes the order that they appear in your selection.

#### **The Sort Dialogue Box.**

The sort dialogue box appears when you select **Contacts/Sort** from the main menu. It simply contains three list boxes that you can use to specify which fields to use for the sort. The primary field is used to sort your list first. The secondary field is examined for any records that have the same contents in the primary field. The third field is examined for any records that have the same contents in the primary field and the same contents in the secondary field.

There are two radio buttons that you can use to control the direction of the sort. Some users like to sort their selection backwards before they print so that the sheets come out in the correct order when the printer finishes.

The sort takes place when you press the enter key or single-click on the OK box. When the sort is complete, your selection is displayed as usual by the browse-list.

#### **The ESP Sort.**

ESP sorts your records in a slightly more useful way than a computer usually does. It puts blank items at the end of a list instead of at the beginning. In all other respects it behaves in exactly the same way as any other alphabetical sort.

### **3.14 Deleting Records.**

There is an option in the contacts menu for deleting database records. When ESP deletes a database record it also deletes the history file and any individual correspondence belonging to the record

You can choose to delete your current record or your current selection of records. Because it is a potentially dangerous command you will be asked to confirm before the operation takes place. Once a record has been deleted it cannot be recovered.

### 3.15 The Record-Editor Mask.

What you see when you bring up the record editor is controlled by a file. It contains text to be displayed and signals that indicate which fields are to be displayed and where. The files that control the screen view are called record editor mask files.

When you first open a database, ESP usually attempts to load a mask with the file name `espw.emf` (`emf` stands for ESP mask file). If it cannot find a mask file to load it makes one using all the available field names in alphabetical order. This is boring and not very useful but it's better than nothing.

#### Loading a Record Editor Mask.

There is a record editor mask sub-menu in the file menu. You can use this to load a different mask file that will give you a different view of your database records.

#### Editing a Record Editor Mask.

There is an option in the **Contacts/Setup** sub-menu for editing your current record editor mask. Don't be worried about accessing this option and changing your current mask. You will not do any permanent harm unless you save the mask.

The mask editor shows you the text and the field signals used in your current mask. Field signals are simply the name of the field preceded immediately by the ampersand (&) character. The amount of space used for displaying the field is controlled by a number of full-stops (.) immediately following the field name. You can inhibit the display of a field by taking its field signal away. You can cause a field to be displayed (if it exists) by inserting its field signal. If you insert a signal for a field that does not exist it will not cause any harm. You will just end up with a blank space on your screen.

#### Saving the Record Editor Mask.

There is an option in the **File/Record Editor Masks** sub-menu for saving your current mask. It results in a standard file save dialogue box. If you want your current mask to become the default mask for your database, save it as `espw.emf` (but check it thoroughly first).

### 3.16 Changing the Browse-List View.

As with the record editor view, what you see when you browse a selection of records is controlled by file. It consists of a single line of text that contains signals that indicate which fields are to be displayed and where. The files that control the screen view are called browse-list mask files.

When you first open a database, ESP usually attempts to load a browse-list mask with the file name `espw.ebm` (`ebm` stands for ESP browse mask). If it cannot find a mask file to load it makes one using the first few of the available field names in alphabetical order. Again, this is boring and not very useful but it's better than nothing.

#### **Loading a Browse-list Mask.**

There is a browse-list mask sub-menu in the file menu. You can use this to load a different browse-list mask file that will give you a different presentation when you view your selection of records.

#### **Editing the Current Browse-list Mask.**

There is an option in the **Contacts/Set-up** sub-menu for editing your current browse-list mask. Don't be worried about accessing this option and changing your current mask. You will not do any permanent harm unless you save the mask. Even then you can use any file name except `espw.ebm`.

The browse-list mask editor shows you the field signals used in your current mask. Browse-list field signals are simply the name of the field. The ampersand (&) character is not required. The amount of space used for displaying the field is controlled by a number of full-stops (.) immediately following the field name. You can inhibit the display of a field by taking its field signal away. You can cause a field to be displayed (if it exists) by inserting its field signal. If you insert a signal for a field that does not exist it will not cause any harm. You will just end up with a blank space on your screen. Only the first line is used by the browse-list viewer and only the first six named fields are used.

#### **Saving the Current Browse-list Mask.**

There is an option in the **File/Browse-List Masks** sub-menu for saving your current browse-list mask. It results in a standard file save dialogue box. If you want your current mask to become the default mask for your database, save it as `espw.ebm` (but check it thoroughly first).

### **3.17 Creating New Database Fields.**

Creating a new database field is easy. There is an option in **Contacts/Set-up** that you can use to make new fields so that your database is exactly suited to your needs. When you select the option you will be presented with a dialogue box that is discussed below.

#### **The Name of the New Field.**

You will have to make up a name for the new field. It must not contain more than eight characters. The first character must be a letter, the remaining characters can be letters or digits.

#### **A Description of the New Field.**

You should enter a brief description of the new field. This will be used frequently to help you identify the field during the future operation of the database.

#### **The Width of the New Field.**

If the new field is a date field or a numeric field then its width is determined automatically. Otherwise you will need to decide how many characters you want to be stored in the new field

#### **Company Fields.**

If you want the information stored in this field to be copied (if required) when a new record is created then you should check the company check-box.

#### **The Type of the New Field.**

You can choose the type of the new field from a list box.

#### **Dates.**

If your new field is to be used for storing dates you will need to choose date, long-date or short-date. All dates are stored in the same way using eight digits (yyyymmdd) but long dates and short dates are displayed in different formats that depend on the international section in your Windows set-up.

#### **Numeric.**

If your new field is to be used for storing numeric quantities then you have a wide choice. They are listed in the box using nines and a short description; e.g. 9999.99 (four plus two) which indicates a four figure number followed by two places of decimals. The type you choose will depend on the values that you wish to store in the field.

#### **Telephone Numbers.**

These fields are for storing telephone numbers. If you want a telephone number field to be available to the ESP dialler then it must be of this type. Unless you particularly want fax numbers to be made available for dialling, you should store them in a field of the any character type.

#### **Any Characters with Auto-Upper-Case.**

Fields of this type will accept any characters. Every character typed will be converted to upper-case.

#### **Any Characters.**

Fields of this type will accept any characters.

#### **Pick-Lists.**

You cannot type text into a pick list field. You can only set the contents of fields of this type by picking an option from a list. If you make a new field of this type you will have to edit its pick-list file before it can be used for storing data. This is described in a later section of this chapter.





### 3.18 Changing Field Parameters.

Most of the parameters of any of the fields in your database can be changed. There is an option in the **Contacts/Set-up** sub-menu that allows you to do this. It consists of two dialogue boxes the first of which asks you to pick the field whose parameters you wish to change. The second dialogue box allows you to set the new parameters.

Any new parameters can be set but some changes of type cannot be carried out if information has already been entered into the field; e.g. it would be impossible to change numbers into dates in any meaningful way.

### 3.19 Deleting a Field.

There is an option in the **Contacts/Set-up** sub-menu that allows you to delete database fields that you do not require.

It displays a dialogue box with a list-box containing a list of fields in your database. If you highlight one of the fields in the list, its description will be displayed so that you can make sure you are choosing the correct field.

When you are sure you have highlighted the correct field there is a delete button to delete the field. You will be asked to confirm before the field is deleted.

### 3.20 Editing a Field Pick List.

Each field of the pick-list type has an associated pick list file. It has the same name as the field with the extension .epl (epl stands for ESP Pick List). The file consists of a number of lines. There is one line for each pick-list option.

There is an option in the **File/Field Pick-lists** sub-menu for editing a pick list file. You will be asked to choose the file you want to edit using a standard file selecting dialogue box.

When you have chosen a pick-list file to edit, it will be displayed in a full window edit control. Make the required changes and save the file using the option in the **File/Field Pick-lists** menu.

## **Chapter 4 - Using AmiPro with ESP.**

You cannot use AmiPro with the Lite version of ESP.

## **Chapter 5 - Using Word with ESP.**

Mail-Merging with Word

Creating a New Word Form Letter

Editing Word Form Letters

Deleting Word Form Letters

Individual Letters with Word

Creating a Word Individual Letter

Editing Word Individual Letters

Deleting Word Individual Letters

Creating a New Word Template

Editing Word Templates

Deleting Word Templates

Label Generating with Word

Creating a New Word Label Sheet

Editing Word Label Sheets

Deleting Word Label Sheets

List Generating with Word

Creating a New Word List Template

Editing Word List Templates

Deleting Word List Templates

ESP accesses Word as an OLE (Object Linking and Embedding) server.

Experienced Windows users will know that it is very easy to switch between applications and get themselves lost. To help avoid confusion, ESP only allows you to word-process one document per instance of ESP. In other words, if you are already word-processing from one instance of ESP, you must finish before you can start any new word-processing.

Note that, if you wish, you can have nine instances of ESP running and each instance can be word-processing. This still gives plenty of opportunity for getting yourself thoroughly disorientated but if you set about things systematically you should not have any trouble.

## 5.1 Mail-Merging with Word.

An ESP mail-merge is constructed from a form letter and data from your contact records. The form letter contains signals that indicate which fields to take data from. Multiple copies of the form letter are generated by the mail-merge. Each copy is prepared with data from different contact records.

The mail-merging facilities within Word are extremely sophisticated and allow you a fine degree of control over how the merge takes place. For this reason, ESP does all the necessary preliminary work and then leaves you in charge.

Select the contacts that you wish to receive the form letter that you are about to mail merge.

Select **Word-Processing/Form Letters/Mail-Merge** from the ESP menu. This will bring up a dialog box that you can use to specify the mail-merge.

Note that you will need to have prepared at least one Word form letter in your database before you can carry out a successful merge using word. Creating a new form letter is covered in the next section of this chapter.

### Word-Processor.

In this box, ESP lists the word-processors supported by ESP. Make sure that Word is high-lighted.

### Current Record/Current Selection Radio Buttons.

Make sure that the radio button you require is high-lighted.

### File Name and Description.

In this box, ESP has listed all the Word form letters available in your current database. Make sure that the one you want to use is high-lighted.

### The OK Button.

When you click on the OK button, ESP generates a Word mail-merge data file using your current selection of records and calls up Word so that you can edit a copy of the form letter you have chosen. The mail-merge data file is then attached automatically to the file. At this point you can view the form-letter and make temporary changes if you wish. The Word Mail-Merge tool bar will be available so that you can view each copy of the letter (the View Merged Data button toggles the display between field names and actual data).

When you are ready, you can merge straight to your printer or merge to a new document using the Word toolbar or **Tools/Mail Merge** from the Word menu.

When you have finished, use **File/Close and return to ESP** from the Word menu. This will return you to ESP and leave Word in memory, ready for further use. ESP will ask you if you want a record of the mail merge to be placed in the history files of all the contacts involved.

The mail-merge file is a temporary file created in your windows temporary file directory. It is not intended that this file should be stored on your computer permanently. If you carry out another mail-merge from the same instance of ESP the same temporary file will be re-used. When you quit an instance of ESP, any temporary files that it generated are removed.

## 5.2 Creating a New Word Form Letter.

Depending on the nature of your business, you will develop a small or large library of form letters. Some will be used for mail-shots; others will be sent singly.

A form letter consists of text, embedded pictures if required, and signals to indicate where data from your contact records should be substituted. In Word files, the signals to retrieve data from your contact records are known as **Merge Fields**.

When you create a new form letter you can specify an existing Word file to copy. This is usually very helpful even if you need to delete most of the text in it. If you wish you can start with a blank page.

Select **Word-Processing/Form Letters/Create Form Letter** from the ESP menu. You will be presented with a dialog box that is explained below.

### **Word-Processor.**

High-light Word in this list-box.

### **New File Name.**

Type a name for the new form letter in this control. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

### **New Description**

You can type one-hundred characters of free text in this control. It will be stored as the description for the new file.

### **Source File Name**

In this box you can type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Word file on your system. If you know what you are doing and don't want to copy an existing file then leave this box blank.

Beneath the box is a list of existing form letters in your current database. You can choose any one of these as the letter to copy with a single-click.

### **The OK Button.**

When you have set everything as required you can click on the OK button. ESP will copy the source file to the new file and call up Word so that you can edit it. ESP will automatically attach a Word merge data file to the letter you are editing. In this case, the data file contains one record only. It consists of the names of the fields in your database.

The Word mail merge tool bar will be on view. You can use the **Insert Merge Field** button to place merge fields wherever you want them in the text.

Use **File/Page Layout** to check that the margins and paper size are set correctly for your needs.

**Address Blocks** You may find it helpful to put the merge fields for the address block into a **frame**. If you then make the frame's position fixed in size and position, you can ensure that the address block is always printed in the same place on the page and that the text outside the frame is not moved if blank lines are removed from the address block. You can easily modify the frame so that the border is not drawn if you wish.

When you have made the changes you require, select **File/Close and return to ESP** from Word's main menu.

The form letter will now be available for future use in your current database.

### **5.3 Editing Word Form Letters.**

You can make changes to any of the form letters belonging to your current database.

Choose **Word-Processing/Form Letters/Edit Form Letter** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Word is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the form letter you have chosen.

#### **The Edit File Button.**

When you click on the Edit File button, ESP will call up Word so that you can edit the form letter that you have chosen.

When you have made the required changes select **File/Close and Return to ESP** from Word's main menu.



## **5.4 Deleting Word Form Letters**

You can delete any of the form letters belonging to your current database.

Choose **Word-Processing/Form Letters/Delete Form Letters** from the ESP menu. This brings up a dialog box which is explained below.

### **Word-Processor.**

Make sure that Word is high-lighted in this box.

### **File Name and Description.**

High-light the files that you wish to delete in this box. Note that you can high-light more than one file.

### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

### **5.5 Individual Letters with Word.**

An exciting feature of ESP is its ability to generate and store letters, invoices, quotations, etc. For simplicity, these items are usually referred to as individual letters. They are always generated for a specific contact. They are named for you automatically using the current date and time and they are linked to the owning contact record.

When you need to review correspondence that you have sent to a particular contact, you simply look up the contact record and ask to see a list of individual letters. This is presented to you in the order that they were created. Each letter is detailed along with its description. Because you only see a list of letters belonging to your current contact there should not be too many to choose from.

## 5.6 Creating a Word Individual Letter.

An individual letter is constructed from a template and data from your current contact record. The template contains signals which indicate which fields ESP needs to take data from. A single copy of the template is generated and then submitted to Word so that you can edit it and print it if you wish.

You must create at least one template before you can create any individual letters. Creating new Word template files is covered in a later section of this chapter.

Select the contact that you wish to receive the letter that you are about to create. If you are not sure, press ctrl+R (or select Contacts/View Record Card) to view the details of your current contact.

Select **Word-Processing/Individual Letters/Create Individual Letter** from the ESP menu. This will bring up a dialog box that you can use to specify the individual letter.

### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Word is high-lighted.

### **New Description**

You can type one-hundred characters of free text in this control. It will be stored as the description for the new individual letter.

### **File Name and Description.**

In this box, ESP has listed all the (Word) templates for individual letters in your current database. Make sure that the one you want to use is high-lighted.

### **The OK Button.**

When you click on the OK button, ESP generates the word-processor file and launches an instance of Word so that you can view, edit, and/or print it.

When you have finished with it, select **File/Close and return to ESP** from Word's main menu.

The file you have been editing is a temporary file created in your windows temporary file directory. When ESP regains the focus, it stores the file for you automatically. It also gives you the opportunity to add an entry to your current contact's history file.

## **5.7 Editing Word Individual Letters.**

You can edit any of the individual letters belonging to your current contact.

Choose **Word-Processing/Individual Letters/Edit Individual Letter** from the ESP menu. This brings up a dialog box which is explained below.

### **Word-Processor.**

Make sure that Word is high-lighted in this box.

### **File Name and Description.**

High-light the file that you wish to edit in this box.

### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the individual letter you have chosen.

### **The Edit File Button.**

When you click on the Edit File button, ESP will call up Word so that you can view, edit or print the letter that you have chosen.

When you have finished select **File/Close and return to ESP** from Word's main menu.

The file you have been editing is a temporary file created in your windows temporary file directory. When ESP regains the focus, it stores the file for you automatically. It also gives you the opportunity to add an entry to your current contact's history file.

## **5.8 Deleting Word Individual Letters.**

You can delete any of the individual letters belonging to your current contact.

Choose **Word-Processing/Individual Letters/Delete Individual Letters** from the ESP menu. This brings up a dialog box which is explained below.

### **Word-Processor.**

Make sure that Word is high-lighted in this box.

### **File Name and Description.**

High-light the files that you wish to delete in this box. Note that you can high-light more than one file.

### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

## 5.9 Creating a New Word Template.

Depending on the nature of your business, you will develop a small or large library of individual letter templates.

A template consists of text, embedded pictures if required, and signals to indicate where data from your contact records should be substituted. In Word files, ESP interprets the ampersand character (&) immediately followed by a field name as a signal to substitute data from your contact records. The field name given should match one of the fields in your database.

When you create a new template can specify an existing template to copy. This is usually very helpful even if you have to delete most of the text that it contains.

Select **Word-Processing/Individual Letters/Create Template File** from the ESP menu. You will be presented with a dialog box which is explained below.

### **Word-Processor.**

High-light Word in this list-box.

### **New File Name.**

Type a name for the new template in this control. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

### **Source File Name**

In this box you can type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Word file on your system. If you don't wish to copy a file leave this control blank.

### **New Description**

You can type one-hundred characters of free text in this control. It will be stored as the description for the new individual letter template.

### **The List of Files**

Beneath the box is a list of existing templates in your current database. You can choose any of these as the file to copy with a single-click.

### **The OK Button.**

When you have set everything as required you can click on the OK button. At this point, ESP will copy the source file to the new file and call up Word so that you can edit it. When you have made the changes you require, select **File/Close and return to ESP** from Word's main menu.

The template will now be available for future use by users of your current database.

**Address Blocks** You may find it helpful to put the signals for the address block into a **frame**. If you then make the frame's position fixed in size and position, you can ensure that the address block is always printed in the same place on the page and that the text outside the frame is not moved if blank lines are removed from the address block. You can easily modify the frame so that the border is not drawn if you wish.

### **5.10 Editing Word Templates for Individual Letters.**

You can edit any of the templates for individual letters that belong to your current database.

Choose **Word-Processing/Individual Letters/Edit Template File** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Word is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the template you have chosen.

#### **The Edit File Button.**

When you click on the Edit File button, ESP will call up Word so that you can edit the template that you have chosen.

When you have made the required changes select **File/Close and return to ESP** from Word's main menu.

### **5.11 Deleting Word Templates.**

You can delete any of the templates belonging to your current database.

Choose **Word-Processing/Individual Letters/Delete Template Files** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Word is high-lighted in this box.

#### **File Name and Description.**

High-light the files that you wish to delete in this box. Note that you can high-light more than one file.

#### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.



## **5.12 Label Generating with Word.**

We recommend that you experiment with Word label printing on its own before you use ESP and Word together. Once you realize how it all works it is easy enough but it can be daunting at first. Unless you are familiar with the way label printing works in Word you cannot expect to have too much success controlling it from ESP.

Labels are generated using a label sheet and data from your contact records. The label sheet contains signals which indicate which fields to take data from. Word label sheets contain the required number of labels to fill a single sheet. The labels are laid out exactly as you would expect to see them on a single sheet of labels.

We believe that we have made label generating with Word as easy as possible. In the example databases, we have provided a few example label sheets which match those commonly available today.

You cannot generate labels unless you have a label sheet to do it with. Creating new label sheets is covered in a later section of this chapter.

As with form letters, ESP does all the necessary preliminary work for label generation. It then calls up Word and then leaves you in charge.

Select the contacts for whom you wish to generate labels.

Select **Word-Processing/Labels/Generate Labels** from the ESP menu. This will bring up a dialog box that you can use to specify the label generation.

### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Word is high-lighted.

### **Current Record/Current Selection/Queue Radio Buttons.**

Make sure that the radio button you require is high-lighted.

Note that your label queue can hold a list of records that you want labels printed for. There are options in the ESP menu for adding requests to your label queue.

### **File Name and Description.**

In this box, ESP has listed all the available label sheets in your current database. Make sure that the one you want to use is high-lighted.

### **The OK Button.**

When you click on the OK button, ESP generates a Word data file and calls up Word so that you can edit. The label sheet you have chosen. You then have complete control over how you want the labels printed.

When you have finished select **File/Close and return to ESP**.

The files you have been working with are temporary files created in your windows temporary file directory. It is not intended that these files should be stored on your computer permanently. If you carry out other word-processing from the same instance of ESP the same temporary file names will be re-used. When you quit an instance of ESP, any temporary files that it generated are removed.

### **Using your Label Queue.**

Windows and Word are usually geared to print whole pages of text. If you decide that you want to print one label at a time then you can waste the remainder of the labels on the page (unless you make special arrangements preferably with a dedicated printer).

ESP allows you to queue labels; one at a time if you wish. When you have accumulated a number of requests in your label queue, you can generate them in one go.

ESP maintains a separate label queue for each user of the database.

There are options in the Word-Processor/Labels menu for adding requests to your label queue. Your label queue is not cleared automatically after generation. There is a separate menu option for this.

### 5.13 Creating a New Word Label Sheet.

The ESP example databases contain a fair number of sample label sheets, most of which are immediately useful. This section describes how to create a new Word label sheet from scratch or by copying an existing one.

A label sheet consists of text (if required) and signals to indicate where data from your contact records should be substituted. Word uses merge fields to retrieve data from your contact records.

When you create a new label sheet you can specify an existing one to copy. This is usually very helpful because the file you copy contains an example on which to base your new sheet.

Select **Word-Processing/Labels/Create New Label Sheet** from the ESP menu. You will be presented with a dialog box which is explained below.

#### **Word-Processor.**

High-light Word in this list-box.

#### **New File Name.**

In this control, type a name for the new label sheet. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

#### **New Description**

In this control, you can type one hundred characters of description for the new label sheet.

#### **Source File Name**

In this box you can type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Word file on your system. If you don't want to copy a file, leave this control blank.

#### **The File List Box**

Beneath the box is a list of existing label sheets in your current database. You can choose any one of these as the file to copy with a single-click.

#### **The OK Button.**

When you have set everything as required you can click on the OK button. When you have done this, ESP will copy the source file to the new file and call up Word so that you can edit it. ESP will also have attached a Word merge data file to the new file. This contains one record consisting of all the fields in your database.

You probably need to set up the label sheet for the labels you want to use. It is not obvious what you have to do so follow these instructions.

1. Choose **Tools/Mail Merge** from the main Word menu. This should bring up the Word Mail Merge Helper box.

2. Click on the **Create** button underneath **Main Document** and choose **Mailing Labels**. You will now be asked a strange question. You will be asked if you want to change the document in ESP from mailing labels to mailing labels. Choose the **Change Document Type** button.

3. Click on the **Setup** button. This brings up a dialog box which, eventually, allows you to set the label sheets you wish to use and fill in a sample label with text and mail merge fields.

When you have made the changes you require, select **File/Close and return to ESP** from Word's main menu.

The label sheet will now be available for future use by users of your current database.

#### **5.14 Editing Word Label Sheets.**

You can edit any of the label sheets belonging to your current database.

Choose **Word-Processing/Labels/Edit Label Sheet** from the ESP menu. This brings up a dialog box which is explained below.

##### **Word-Processor.**

Make sure that Word is high-lighted in this box.

##### **File Name and Description.**

High-light the file that you wish to edit in this box.

##### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the label sheet you have chosen.

##### **The Edit File Button.**

When you click on the Edit File button, ESP will launch an instance of Word so that you can edit the file you have chosen.

If necessary, you can carry out the label setup procedure outlined in the previous section of this chapter. See [Creating a New Word Label Sheet](#)

When you have made the required changes select **File/Close and return to ESP** from Word's main menu.

### **5.15 Deleting Word Label Sheets.**

You can delete any of the label sheets belonging to your current database.

Choose **Word-Processing/Labels/Delete Label Sheet** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Word is high-lighted in this box.

#### **File Name and Description.**

In this box, high-light the files that you wish to delete. Note that you can high-light more than one file.

#### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

### 5.16 List Generating with Word.

Lists are generated using a list template and data from your contact records. The list template contains text (if required), signals which indicate which fields to take data from and signals to indicate that data should be taken from the appropriate ESP history file.

Depending on the nature of the template file used, lists produced by ESP can range from simple telephone lists to complex activity reports. Word has many sophisticated features that will allow you to achieve the results you need. As with form letters, ESP does the preliminary work and then calls up Word leaving you in charge of what happens next.

You cannot generate a list using Word unless you have created at least one Word list template. Creating new list templates is covered later in this chapter.

Select the contacts for whom you wish to generate the list.

Select **Word-Processing/Lists/Generate Lists** from the ESP menu. This will bring up a dialog box that you can use to specify the list generation.

#### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Word is high-lighted.

#### **Current Record/Current Selection.**

Make sure that the radio button you require is high-lighted.

#### **File Name and Description.**

In this box, ESP has listed all the available list templates in your current database. Make sure that the one you want to use is high-lighted.

#### **The OK Button.**

When you click on the OK button, ESP generates a Word merge data file and then calls up Word so that you can edit the template you have chosen. ESP will have attached the merge data file to the Word file.

When you have finished with the list file, select **File/Close and return to ESP** from the Word main menu.

It is not normal to save the list file. The list file is a temporary file created in your windows temporary file directory. It is not intended that this file should be stored on your computer permanently. If you carry out other word-processing from the same instance of ESP the same temporary file will be re-used. When you quit an instance of ESP, any temporary files that it generated are removed.

### **5.17 Creating a New Word List Template.**

Depending on the nature of the template file used, lists produced by ESP can range from simple telephone lists to complex activity reports. Word has many sophisticated features that will allow you to achieve the results you need. As with form letters, ESP does the preliminary work and then calls up Word leaving you in charge of what happens next. You can use the Word mail merge commands to examine the contents of fields and cause different things to happen accordingly. You can place merge-fields into tables and allow Word to perform calculations. All the functionality of Word is available to the users of the templates you create.

The ESP example databases contain some sample list templates which you can use and examine to familiarise yourself with the techniques involved..

A list template consists of text (if required) and signals to indicate where data from your contact records should be substituted and signals to indicate where data from history files should be substituted. ESP uses merge fields to retrieve data from your contact records.

The names of the merge fields can match the names of ESP database fields. In addition you can use the reserved names history1, history2, history3, etc. History1 refers to the most recent entry in a history file. History2 refers to the second most recent entry in a history file and so on.

When you create a new list template you can specify an existing one to copy. This usually very helpful because the file you copy contains an example on which to base your new template.

Select **Word-Processing/Lists/Create New List Template** from the ESP menu. You will be presented with a dialog box which is explained below.

#### **Word-Processor.**

High-light Word in this list-box.

#### **New File Name.**

In this control, type a name for the new list template. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

#### **New Description**

In this control you can type one-hundred characters of free text to describe the list template you are about to create.

#### **Source File Name**

In this box you can type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Word file on your system. If you do not want to copy an existing file, leave this box blank.

#### **The File List Box**

Beneath the box is a list of existing list templates in your current database. You can choose any one of these as the file to copy with a single-click.

#### **The OK Button.**

When you have set everything as required you can click on the OK button. When you have done this, ESP will copy the source file to the new file and call up Word so that you can edit the new file. A merge data file consisting of one dummy record will have been attached to your new file. It contains all the fields in your database plus history field names so that you can insert merge fields into the list template.

When you have made the changes you require, select **File/Close and return to ESP**



The list template will now be available for future use in your current database.

### **5.18 Editing Word List Templates.**

You can make changes to any of the list templates belonging to your current database.

Choose **Word-Processing/Lists/Edit List Template** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Word is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the list template you have chosen.

#### **The OK Button.**

When you click on the OK button, ESP will call up Word so that you can edit it.

When you have made the required changes select **File/Close and return to ESP** from Word's main menu.

### **5.19 Deleting Word List Templates.**

You can delete any of the list templates belonging to your current database.

Choose **Word-Processing/Lists/Delete List Template** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Word is high-lighted in this box.

#### **File Name and Description.**

In this box, high-light the files that you wish to delete. Note that you can high-light more than one file.

#### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

## 5.20 Word List Templates - Hints and Tips.

The quality of the lists and reports that you produce using ESP and Word depends on the quality of the templates that you design. It can take some time to get a template right but, once done, it can be used again and again.

### Margins

Remember to set the margins in the template file.

### Section Breaks

When Word carries out a merge for you, it inserts a section break in between each copy that it makes. By default, the section break causes a new page to be started but you can change this if you want multiple entries on the same page. Select **File/Page Setup** from the Word main menu and select the **Layout** tab. Under **Section Start** choose 'Continuous' as opposed to 'New Page'.

### IF Fields

Quite often you will want to print the components of an address, separated by commas, on a single line. You can insert IF fields to cause Word to insert a comma and a space only if the preceding field is blank.

### Text Flow

If you don't want the component paragraphs in an entry to be split across pages you use **Format/Paragraph/TextFlow** to set up each line so that its lines are kept together and it is kept with the next paragraph.

### Headers and Footers

Your lists and reports can have headers and footers if you require. It is frequently useful to put a page number field and a date field in the header or footer. We seem to have difficulties if we use **Insert/Page Numbers** but we have no trouble with **Insert/Field/Page**.

### Tables

It is quite acceptable to place mergefields into tables. You can then have cells in the tables that calculate values based on other cells in the table. ESP exports a blank from a numeric field if you haven't entered any data. You may find you need some IF fields to insert zero when the field is blank so that your calculations don't generate errors.

### History File Paragraphs

The field exported from ESP for each history file number in the template (history1, history2, etc.) consists of an entry date, a tab character, an action date and time if the entry is active, another tab character and the accompanying note. By arranging the tab stops and indents for the paragraphs containing history file entries you can cause them to be printed very neatly and readably.

### Experimentation

Experimentation is the key. Don't be disappointed if you get things wrong a few times. Analyse what the problem was and find out how to put it right.

## **Chapter 6 - Using WordPerfect with ESP.**

You cannot use WordPerfect with the Lite version of ESP.

## **Chapter 7 - Using Write with ESP.**

Mail-Merging with Write

Creating a New Write Form Letter

Editing Write Form Letters

Deleting Write Form Letters

Individual Letters with Write

Creating a Write Individual Letter

Editing Write Individual Letters

Deleting Write Individual Letters

Creating a New Write Template

Editing Write Templates

Deleting Write Templates

Label Generating with Write

Creating a New Write Label Sheet

Editing Write Label Sheets

Deleting Write Label Sheets

List Generating with Write

Creating a New Write List Template

Editing Write List Templates

Deleting Write List Templates

'Write' is the word-processor supplied with Windows 3.1 as one of the bundle of example utilities. It is certainly not an advanced windows word-processor but compared with early DOS word-processors it is very capable. If your requirements are simple and straight-forward and you do not need a spelling checker or a grammar checker then you should give write a try before buying for anything more expensive. ESP can use Write very effectively.

Write is not an OLE (Object Linking and Embedding) server so ESP does not have as much control over it as it does with the other supported word-processors. Experienced Windows users will know that it is very easy to switch between applications and get themselves lost. To help avoid confusion, ESP only allows one instance of your word-processor per instance of ESP. In other words, if you are already word-processing from one instance of ESP, you must finish before you can start any new word-processing.

Note that, if you wish, you can have nine instances of ESP running and each instance can be running an instance of Write. This still gives plenty of opportunity for getting yourself thoroughly disorientated but if you set about things systematically you should not have any trouble.

### **Write File Descriptions.**

Modern word processors provide some facility to maintain long descriptions of files but Write does not. ESP allows you to set one-hundred characters of descriptive text with each Write file stored in your databases. Whenever you are asked to choose a write file, you will be presented with a list of file names (or creation dates if they are individual letters) and their descriptions.

## **7.1 Mail-Merging with Write.**

A mail-merge is constructed from a form letter and data from your contact records. The form letter contains signals that indicate which fields to take data from. Multiple copies of the form letter are generated by the mail-merge. Each copy is prepared with data from different contact records.

Write has no mail-merge functions of its own. ESP overcomes this omission by generating the merged file for you. If you carry out a mail-merge with a selection of two hundred records then ESP generates a large file containing two hundred copies of the form letter you have chosen. Each copy has been modified with data from each of the contact records in your selection. The large file is then submitted to Write so that you can edit it and print it if you wish.

Select the contacts that you wish to receive the form letter that you are about to mail merge.

Select **Word-Processing/Form Letters/Mail-Merge** from the ESP menu. This will bring up a dialog box that you can use to specify the mail-merge.

### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Write is high-lighted.

### **Current Record/Current Selection Radio Buttons.**

Make sure that the radio button you require is high-lighted.

### **File Name and Description.**

In this box, ESP has listed all the form letters available in your current database. Make sure that the one you want to use is high-lighted.

### **The OK Button.**

When you click on the OK button, ESP generates the mail-merge file and launches an instance of Write so that you can view, edit, and/or print it.

Note that, if the mail-merge file is large, Write can take a long time to load it. It can appear that something has gone wrong. We have found Write to be extremely robust so just be patient. If the file is large and your computer doesn't have much memory then Write may refuse to let you edit or view it.

When you have finished with the mail-merge file, quit the instance of Write that you are using. Unless you have been switching around between applications in the meantime, the focus will be returned to the ESP window where you started.

The mail-merge file is a temporary file created in your windows temporary file directory. It is not intended that this file should be stored on your computer permanently. If you carry out another mail-shot from the same instance of ESP the same temporary file will be re-used. When you quit an instance of ESP, any temporary files that it generated are removed.

## 7.2 Creating a New Write Form Letter.

Depending on the nature of your business, you will develop a small or large library of form letters. Some will be used for mail-shots; others will be sent singly.

A form letter consists of text, embedded pictures if required, and signals to indicate where data from your contact records should be substituted. In Write files, ESP interprets the ampersand character (&) immediately followed by a word (not separated by a space) as a signal to retrieve data from your contact records. The word following the ampersand character is the name of the field to be used.

When you create a new form letter you can specify an existing form letter to copy. This is usually very helpful even if you need to delete most of the text in it.

Select **Word-Processing/Form Letters/Create Form Letter** from the ESP menu. You will be presented with a dialog box that is explained below.

### **Word-Processor.**

High-light Write in this list-box.

### **New File Name.**

Type a name for the new form letter in this control. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

### **New Description**

You can type one-hundred characters of free text in this control. It will be stored as the description for the new file.

### **Source File Name**

In this box you should type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Write file on your system. If you know what you are doing and don't want to copy an existing file then leave this box blank.

Beneath the box is a list of existing form letters in your current database. You can choose any one of these as the letter to copy with a single-click.

### **The OK Button.**

When you have set everything as required you can click on the OK button. ESP will copy the source file to the new file and launch an instance of Write so that you can edit it.

When you have made the changes you require, simply exit Write. You will be asked if you want to save the changes you have made. Needless to say, you answer 'Yes'. Do not use 'save as'.

The form letter will now be available for future use in your current database.



### **7.3 Editing Write Form Letters.**

You can make changes to any of the form letters belonging to your current database.

Choose **Word-Processing/Form Letters/Edit Form Letter** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the form letter you have chosen.

#### **The Edit File Button.**

When you click on the Edit File button, ESP will launch an instance of Write so that you can edit the form letter that you have chosen.

When you have made the required changes simply quit Write. You will be asked if you want to save the changes you have made. Answer yes or no as appropriate.

## **7.4 Deleting Write Form Letters**

You can delete any of the form letters belonging to your current database.

Choose **Word-Processing/Form Letters/Delete Form Letters** from the ESP menu. This brings up a dialog box which is explained below.

### **Word-Processor.**

Make sure that Write is high-lighted in this box.

### **File Name and Description.**

High-light the files that you wish to delete in this box. Note that you can high-light more than one file.

### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

### **7.5 Individual Letters with Write.**

An exciting feature of ESP is its ability to generate and store letters, invoices, quotations, etc. For simplicity, these items are usually referred to as individual letters. They are always generated for a specific contact. They are named for you automatically using the current date and time and they are linked to the owning contact record.

When you need to review correspondence that you have sent to a particular contact, you simply look up the contact record and ask to see a list of individual letters. This is presented to you in the order that they were created. Each letter is detailed along with its description. Because you only see a list of letters belonging to your current contact there should not be too many to choose from.

## **7.6 Creating a Write Individual Letter.**

An individual letter is constructed from a template and data from your current contact record. The template contains signals which indicate which fields ESP needs to take data from. A single copy of the template is generated and then submitted to Write so that you can edit it and print it if you wish.

Select the contact that you wish to receive the letter that you are about to create. If you are not sure, press ctrl+R (or select Contacts/View Record Card) to view the details of your current contact.

Select **Word-Processing/Individual Letters/Create Individual Letter** from the ESP menu. This will bring up a dialog box that you can use to specify the individual letter.

### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Write is high-lighted.

### **New Description**

You can type one-hundred characters of free text in this control. It will be stored as the description for the new individual letter.

### **File Name and Description.**

In this box, ESP has listed all the templates for individual letters in your current database. Make sure that the one you want to use is high-lighted.

### **The OK Button.**

When you click on the OK button, ESP generates the word-processor file and launches an instance of Write so that you can view, edit, and/or print it.

When you have finished with it, quit the instance of Write that you are using. Under normal circumstances, the focus will be returned to ESP.

The file you have been editing is a temporary file created in your windows temporary file directory. When ESP regains the focus, it stores the file for you automatically. It also gives you the opportunity to add an entry to your current contact's history file.

## **7.7 Editing Write Individual Letters.**

You can edit any of the individual letters belonging to your current contact.

Choose **Word-Processing/Individual Letters/Edit Individual Letter** from the ESP menu. This brings up a dialog box which is explained below.

### **Word-Processor.**

Make sure that Write is high-lighted in this box.

### **File Name and Description.**

High-light the file that you wish to edit in this box.

### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the individual letter you have chosen.

### **The Edit File Button.**

When you click on the Edit File button, ESP will launch an instance of Write so that you can view, edit or print the letter that you have chosen.

When you have finished simply quit Write. You will be asked if you want to save the changes you have made. Answer yes or no as appropriate.

The file you have been editing is a temporary file created in your windows temporary file directory. When ESP regains the focus, it stores the file for you automatically. It also gives you the opportunity to add an entry to your current contact's history file.

## **7.8 Deleting Write Individual Letters.**

You can delete any of the individual letters belonging to your current contact.

Choose **Word-Processing/Individual Letters/Delete Individual Letters** from the ESP menu. This brings up a dialog box which is explained below.

### **Word-Processor.**

Make sure that Write is high-lighted in this box.

### **File Name and Description.**

High-light the files that you wish to delete in this box. Note that you can high-light more than one file.

### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

## **7.9 Creating a New Write Template.**

Depending on the nature of your business, you will develop a small or large library of individual letter templates.

A template consists of text, embedded pictures if required, and signals to indicate where data from your contact records should be substituted. In Write files, ESP interprets the ampersand character (&) immediately followed by a word (not separated by a space) as a signal to retrieve data from your contact records. The word following the ampersand character is the name of the field to be used.

When you create a new template can specify an existing template to copy. This is usually very helpful even if you have to delete most of the text that it contains.

Select **Word-Processing/Individual Letters/Create Template File** from the ESP menu. You will be presented with a dialog box which is explained below.

### **Word-Processor.**

High-light Write in this list-box.

### **New File Name.**

Type a name for the new template in this control. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

### **Source File Name**

In this box you should type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Write file on your system.

### **New Description**

You can type one-hundred characters of free text in this control. It will be stored as the description for the new individual letter template.

### **The List of Files**

Beneath the box is a list of existing templates in your current database. You can choose any of these as the file to copy with a single-click.

### **The OK Button.**

When you have set everything as required you can click on the OK button. At this point, ESP will copy the source file to the new file and launch an instance of Write so that you can edit it. When you have made the changes you require, simply exit Write. You will be asked if you want to save the changes you have made. Needless to say, you answer 'Yes'. Do not use 'save as'.

The template will now be available for future use by users of your current database.

### **7.10 Editing Write Templates for Individual Letters.**

You can edit any of the templates for individual letters that belong to your current database.

Choose **Word-Processing/Individual Letters/Edit Template File** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the template you have chosen.

#### **The Edit File Button.**

When you click on the Edit File button, ESP will launch an instance of Write so that you can edit the template that you have chosen.

When you have made the required changes simply quit Write. You will be asked if you want to save the changes you have made. Answer yes or no as appropriate.



### **7.11 Deleting Write Templates.**

You can delete any of the templates belonging to your current database.

Choose **Word-Processing/Individual Letters/Delete Template Files** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

High-light the files that you wish to delete in this box. Note that you can high-light more than one file.

#### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

## **7.12 Label Generating with Write.**

Nobody (except liars) ever said that label printing was easy. The unblemished truth is that label printing can be tricky. If you expect a single printer to print your normal correspondence as well as your labels then you're going to have your special share of headaches. The remainder of this section is for those of you brave enough to even consider label printing. If possible, dedicate a printer to the job. Just remember at all times that most label sheets are twelve inches long (i.e. not A4). The rest of us use other techniques like (1) printing directly onto envelopes, (2) window envelopes, (3) the type-writer gathering dust in the corner or (4) hand-writing.

We believe that we have made label generating with Write as easy as possible. We have provided numerous example label sheets which match those commonly available today. ESP generates your label file very quickly and you always get to view it with Write before you print it.

Labels are generated using a label sheet and data from your contact records. The label sheet contains signals which indicate which fields to take data from. ESP label sheets for use with Write contain the required number of labels to fill a single sheet. The labels are laid out exactly as you would expect to see them on a single sheet of labels. The horizontal positioning of the labels is controlled by the left margins and the tab settings. The vertical positioning is controlled by the size of the text used and the number of lines per label.

Write has no label generating functions of its own. ESP overcomes this by generating the label file for you. If you generate labels for a selection of two hundred records then ESP generates a file containing enough copies of the label sheet for two hundred labels. Each label will have been modified with data from each of the contact records in your selection. The file is then submitted to Write so that you can view, edit or print it as you wish.

Select the contacts for whom you wish to generate labels.

Select **Word-Processing/Labels/Generate Labels** from the ESP menu. This will bring up a dialog box that you can use to specify the label generation.

### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Write is high-lighted.

### **Current Record/Current Selection/Queue Radio Buttons.**

Make sure that the radio button you require is high-lighted.

### **File Name and Description.**

In this box, ESP has listed all the available label sheets in your current database. Make sure that the one you want to use is high-lighted.

### **The OK Button.**

When you click on the OK button, ESP generates the label file and launches an instance of Write so that you can view, edit, and/or print it.

Note that, if the label file is large, Write can take a long time to load it.

When you have finished with it, quit the instance of Write that you are using. Under normal circumstances, the focus will be returned to ESP.

The label file is a temporary file created in your windows temporary file directory. It is not intended that this file should be stored on your computer permanently. If you carry out other word-processing from the same instance of ESP the same temporary file will be re-used. When you quit an instance of ESP, any temporary files that it generated are removed.

### **Using your Label Queue.**

Windows and Write are geared to print whole pages of text. If you decide that you want to print one label at a time then you will waste the remainder of the labels on the page (unless you make special arrangements preferably with a dedicated printer).

ESP allows you to queue labels; one at a time if you wish. When you have accumulated a number of requests in your label queue, you can generate them in one go.

ESP maintains a separate label queue for each user of the database.

There are options in the Word-Processor/Labels menu for adding requests to your label queue. Your label queue is not cleared automatically after generation. There is a separate menu option for this.

### **7.13 Creating a New Write Label Sheet.**

ESP is supplied with a fair number of example label sheets, most of which are immediately useful. Most users will want to delete the ones they do not need rather than create new ones but this section explains how anyway.

A label sheet consists of text (if required) and signals to indicate where data from your contact records should be substituted. In Write files, ESP interprets the ampersand character (&) immediately followed by a word (not separated by a space) as a signal to retrieve data from your contact records. The word following the ampersand character is the name of the field to be used.

When you create a new label sheet you can specify an existing one to copy. This is usually very helpful because the file you copy contains an example on which to base your new sheet.

Select **Word-Processing/Labels/Create New Label Sheet** from the ESP menu. You will be presented with a dialog box which is explained below.

#### **Word-Processor.**

High-light Write in this list-box.

#### **New File Name.**

In this control, type a name for the new label sheet. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

#### **New Description**

In this control, you can type one hundred characters of description for the new label sheet.

#### **Source File Name**

In this box you should type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Write file on your system. If you don't want to copy a file, leave this control blank.

#### **The File List Box**

Beneath the box is a list of existing label sheets in your current database. You can choose any one of these as the file to copy with a single-click.

#### **The OK Button.**

When you have set everything as required you can click on the OK button. When you have done this, ESP will copy the source file to the new file and launch an instance of Write so that you can edit it. When you have made the changes you require, simply exit Write. You will be asked if you want to save the changes you have made. Needless to say, you answer 'Yes'. Do not use 'save as'.

The label sheet will now be available for future use by users of your current database.

### **7.14 Editing Write Label Sheets.**

You can edit any of the label sheets belonging to your current database.

Choose **Word-Processing/Labels/Edit Label Sheet** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the label sheet you have chosen.

#### **The Edit File Button.**

When you click on the Edit File button, ESP will launch an instance of Write so that you can edit the file you have chosen.

When you have made the required changes simply quit Write. You will be asked if you want to save the changes you have made. Answer yes or no as appropriate.

### **7.15 Deleting Write Label Sheets.**

You can delete any of the label sheets belonging to your current database.

Choose **Word-Processing/Labels/Delete Label Sheet** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

In this box, high-light the files that you wish to delete. Note that you can high-light more than one file.

#### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

## **7.16 List Generating with Write.**

Lists are generated using a list template and data from your contact records. The list template contains text (if required) signals which indicate which fields to take data from and signals to indicate that data should be taken from the appropriate ESP history file.

Depending on the nature of the template file used, lists produced by ESP can range from simple telephone lists to complex activity reports.

Write has no list generating functions of its own. ESP overcomes this by generating the list file for you. If you generate a list for a selection of two hundred records then ESP generates a file containing two hundred copies of the template. Each copy will have been modified with data from each of the contact records (and history files if appropriate) in your selection. Most lists will fill pages as required but if the template finishes with a page-break then each of the copies will be separated by a page-break. The file is then submitted to Write so that you can view, edit or print it as you wish.

Select the contacts for whom you wish to generate the list.

Select **Word-Processing/Lists/Generate Lists** from the ESP menu. This will bring up a dialog box that you can use to specify the list generation.

### **Word-Processor.**

In this box, ESP lists the word-processors supported by ESP. Make sure that Write is high-lighted.

### **Current Record/Current Selection.**

Make sure that the radio button you require is high-lighted.

### **File Name and Description.**

In this box, ESP has listed all the available list templates in your current database. Make sure that the one you want to use is high-lighted.

### **The OK Button.**

When you click on the OK button, ESP generates the list file and launches an instance of Write so that you can view, edit, and/or print it.

Note that, if the list file is large, Write can take a long time to load it.

When you have finished with the list file, quit the instance of Write that you are using. Under normal circumstances, the focus will be returned to ESP.

It is not normal to save the list file. The list file is a temporary file created in your windows temporary file directory. It is not intended that this file should be stored on your computer permanently. If you carry out other word-processing from the same instance of ESP the same temporary file will be re-used. When you quit an instance of ESP, any temporary files that it generated are removed.

### **7.17 Creating a New Write List Template.**

ESP is supplied with a number of example list templates, most of which are immediately useful.

A list template consists of text (if required) and signals to indicate where data from your contact records should be substituted and signals to indicate where data from history files should be substituted. In Write files, ESP interprets the ampersand character (&) immediately followed by a word (not separated by a space) as a signal to retrieve data from your contact records. The word following the ampersand character can be the name of the field to be used or history1, history2, history3, etc. History1 refers to the most recent entry in a history file. History2 refers to the second most recent entry in a history file and so on.

When you create a new list template you will be asked to specify an existing one to copy. This is usually very helpful because the file you copy contains an example on which to base your new template.

Select **Word-Processing/Lists/Create New List Template** from the ESP menu. You will be presented with a dialog box which is explained below.

#### **Word-Processor.**

High-light Write in this list-box.

#### **New File Name.**

In this control, type a name for the new list template. The name should consist of no more than eight characters. The first character must be a letter. The other characters must be letters or digits.

#### **New Description**

In this control you can type one-hundred characters of free text to describe the list template you are about to create.

#### **Source File Name**

In this box you should type the full path of the file that you want to be copied to the new file to provide a starting point. It can be any Write file on your system. If you do not want to copy an existing file, leave this box blank.

#### **The File List Box**

Beneath the box is a list of existing list templates in your current database. You can choose any one of these as the file to copy with a single-click.

#### **The OK Button.**

When you have set everything as required you can click on the OK button. At this point, ESP will ask you to provide a description for the list template. When you have done this, ESP will copy the source file to the new file and launch an instance of Write so that you can edit it. When you have made the changes you require, simply exit Write. You will be asked if you want to save the changes you have made. Needless to say, you answer 'Yes'. Do not use 'save as'.

The list template will now be available for future use in your current database.



### **7.18 Editing Write List Templates.**

You can make changes to any of the list templates belonging to your current database.

Choose **Word-Processing/Lists/Edit List Template** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

High-light the file that you wish to edit in this box.

#### **The Edit Description Button.**

When you click on the Edit Description button, ESP will give you the opportunity of editing the description stored with the list template you have chosen.

#### **The OK Button.**

When you click on the OK button, ESP will launch an instance of Write so that you can edit it.

When you have made the required changes simply quit Write. You will be asked if you want to save the changes you have made. Answer yes or no as appropriate.

### **7.19 Deleting Write List Templates.**

You can delete any of the list templates belonging to your current database.

Choose **Word-Processing/Lists/Delete List Template** from the ESP menu. This brings up a dialog box which is explained below.

#### **Word-Processor.**

Make sure that Write is high-lighted in this box.

#### **File Name and Description.**

In this box, high-light the files that you wish to delete. Note that you can high-light more than one file.

#### **The Delete Button.**

When you click on the Delete button, ESP will ask you to confirm that you want the files deleted. If you answer yes, the files will be deleted irrevocably.

## **Chapter 8 - ESP History Files.**

What are History Files?

Adding a New History File Entry

Automatic History File Entries

Viewing History Files

Printing History Files

Modifying a History File Entry

## 8.1 What are History Files?

Each contact in an ESP database can have a history file.

An ESP history file can hold up to sixteen thousand entries. History files track all your activities with your contacts. ESP automatically adds notes and dates when correspondence is produced and you can add your own information. Your notes will include records of telephone conversations, things to do, the results of visits made and so on. Each entry in the history file is automatically date stamped and you can assign a different follow up date to each entry if necessary.

Each entry is identified by the exact time (to within an eighteenth of a second GMT) that it was created. Each entry consists of up to two thousand characters of free text and an optional action date-time. ESP also records the exact time of the most recent modification to each history file entry along with the identity of the user making the modification.

Each history file can have many active action dates. These action dates can be used in record searches to find contacts due for follow-up or other kinds of attention.

When two databases are synchromeshed, it will frequently be the case that a particular contact's history file will be modified independently on each system. ESP uses the date-time information, where necessary, to construct one history file out of the history files on both systems. If an entry exists in both files (i.e. an entry in one file has an identical create time to an entry in the other file) then the time (GMT) that the entries were last modified is examined. The newest entry is used for the meshed file. The system is not perfect. Bear in mind that two, independent users could modify the same entry at exactly the same time. Another small problem arises if an entry is deleted on one system but not on the other. When you synchromesh the two databases, the deleted entry re-appears.

## 8.2 Adding a New History File Entry.

Make sure that your current record is the one that you want to modify. If you're not sure, press ctrl+R or select **Contacts/View Record Card** from the menu to check. Select **History/Add New Entry** from the menu to bring up the history file dialog box.

### **Free Text.**

Fill in the text that you want recorded in the entry. There is a pick-list of commonly used phrases situated directly below the text box. These can be picked for insertion into the text with a double click of your mouse. The pick-list can be edited if required. This is covered later in this chapter.

### **Action Date-Time.**

If required, activate the action date-time with the 'Act' button. Use the scroll bars to set the exact time that you want to be reminded about this entry.

### **The Save Button.**

When you have set the text and action date to your satisfaction, click on the Save button to store the entry into your current record's history file.

### **8.3 Automatic History File Entries.**

Whenever ESP thinks that you may have produced a letter, fax or any other kind of mail, it gives you the opportunity to record the event in the relevant history file (or files). It even places the description of the word processor file you have used into the text box for you.

#### **8.4 Viewing History Files.**

History files are viewed in a separate, overlapping window with its own vertical scroll-bar. It is activated by selecting HistoryEntries from the menu.

When the history file viewer is first activated, it displays the latest few entries from the file of your current record. The bigger the window, the more entries can be displayed. The same thing happens when you select a new current record (i.e. the latest few records are displayed). In this way you can quickly flick through a selection of records viewing the latest history of each.

The first line of each entry displays the date that it was created on the left and, if applicable, the action date-time on the right. The text belonging to the entry is displayed starting on the next line.

You can scroll through a long history file using the vertical scroll bar in the history file window.

### **8.5 Printing History Files.**

History file entries are available for using in mail-merges with your word-processor. If you are familiar with mail-merging you will know that your word-processor takes text from specified fields of your contact records to generate its output.

ESP reserves the field names history1, history2, history3, etc. History1 refers to the latest entry in the history file, history2 refers to the second latest entry in the history file and so on.

Mail-merging is covered fully in the word-processing chapters of this manual.



## **8.6 Modifying a History File Entry.**

You can modify the action date for a particular history file entry and you can delete the entry but you cannot alter the text.

Double-click on the history file entry that you wish to modify. This will bring up a dialog box similar to the one used for creating history file entries.

### **Action Date-Time.**

If required, activate or de--activate the action date-time with the **Act/Off** button. Use the scroll bars to change the action date-time.

### **The Delete Button.**

The delete button simply deletes the entry.

## **Chapter 9 - Synchromeshing.**

What is Synchromesh?

Selective Synchromesh

Preparing Databases for Synchromesh

Carrying Out a Synchromesh

Synchromesh and Networks

## 9.1 What is Synchronesh?

This chapter describes the ESP synchroneshing facility and explains how to use it.

Note that synchronesh is only available in the full version of ESP. It is not available in the Lite version.

In the gear-box of your car, the synchronesh components strive to make sure that two shafts are rotating at the same speed before the gears that connect them are engaged.

The ESP synchronesh facility will 'bring up to speed' two related databases on different systems. It is commonly used between an office based computer and one or more portable computers that are carried around from location to location.

ESP synchronesh must not be confused with a database shared between a number of workstations on a network. On a network-shared database, any modifications to the contact records, the history files, correspondence, etc. are all taking place within a single copy of the database. This is not the case with a synchroneshed database. Satellite computers have their own separate copy of the database. Two databases can be synchroneshed when the computers maintaining them are connected in some way.

When two databases are synchroneshed, the following actions take place.

1. The list of contact records is examined. Any newly created records in one database are copied to the other database and vice-versa
2. Each field of each contact record in one database is compared with the corresponding field in the other database. If the contents differ, the modification date-time stamps are compared (each field in each record has its own modification date-time stamp). The contents of the most recently modified field are used to overwrite the contents of the field in the other database. Note that ESP date-time stamps are recorded using GMT. Even if you have used your lap-top computer in Australia, the system will still work.
3. Each history file in each database is examined. Any newly created history files in one database are copied to the other database and vice-versa.
4. Each history file in one database is compared with the corresponding history file in the other database. Any newly created entries in one history file are copied to the other history file. This can be a two way process. Each entry in one file is compared with the corresponding entry in the other file. If they differ, their modification date-time stamps are compared. The contents of the newest of the two are used to overwrite the other.
5. All individual correspondence is examined. Any newly created individual letters in one database are copied to the other and vice versa. Each item of individual correspondence in one database is compared with the corresponding item in the other. If any differences are found, the contents of the newest are used to overwrite the other.

## 9.2 Selective Synchronesh.

The ESP synchronesh can work on the whole database or a subset of the database. This is the pay-off from the irritating task of typing in your three-letter identification code every now and again.

If you recall, every record in an ESP database is owned by one of the users. If you wish, the synchronesh will only work on one particular user's records. This is its normal way of working. You have to check a box to get it to synchronesh all the records.

Commonly, an office database is set up to contain everybody's records and each lap-top user has a database with just their own records. Typically this may be just a few hundred records. The speed of the synchronesh is improved dramatically and can be carried out every few days with little inconvenience.

### Synchronesh Hardware Requirements.

In order to synchronesh two databases, the computer carrying out the synchronesh must be able to 'see' both databases. There are several different methods of achieving this. Here are a few examples.

1. Connect the two computers to the same network.
2. Connect the two computers using a peer-to-peer network. This need not be quite as local as it sounds. It appears, for instance, that Windows 4 (code name Chicago) will allow connection using a modem and the public service telephone network. With a modern, high-speed modem and reasonably sized databases this could be realistic.
3. Connect the two computers using InterLnk. Use a parallel cable in preference to a serial cable. It is about three times faster. Also make sure that **SMARTDRV** or any other **read-ahead** disk-cacheing utility is **DISABLED** on the linked drive. This, surprisingly, speeds the process by a factor of approximately nine.
4. Move a removable hard disk unit from one machine to the other. Both databases will then be visible on the same computer.
5. Make a back-up of one database. Restore the back-up to the other machine where it will be visible. Carry out the synchronesh. Back-up the meshed database and restore it onto the original machine. This sounds tedious but it also means that you have a set of backup diskettes which you have tested.

### 9.3 Preparing Databases for Synchronesh.

No special action is required to enable synchroneshing to take place between two databases but you must make sure that the fields that you want to be included have the same name and are of the same type and record size.

You can have private fields on either database that will not be included in the synchronesh. Simply make sure that there is not a field of the same name on the other database.

The easiest way of setting up two parallel databases at the start is to connect the two computers and copy all the files from one to the other.

If the new database is going to have a subset of data from the main database, connect the two computers so that the new database's computer can see the main computer. Create a new database on the new database's computer using the database on the main computer as a pattern. All the fields will be created, all the masks will be copied and the configuration files will be copied but no data will be copied. Finally, carry out the synchronesh for the required user or users. All the necessary records will be copied along with the relevant history files and individual correspondence.

#### Pass 1 and Pass 2

A synchronesh is carried out in two passes. The first pass is carried out by the ESP menu command. This creates a **task file** in your current database and in the remote database. Pass 2 is carried out by separate processes which run in background. These processes take commands and data from the task files and make any necessary modifications to the appropriate databases.

The background process for pass 2 is contained in the Windows application called ESPWSYNC.EXE. If you wish you can place an icon for ESPWSYNC in your startup group. This will ensure that it monitors the database (specified by the icon's working directory) and 'wakes up' whenever it needs to.

If you do not start ESPWSYNC yourself, it will be started automatically whenever you carry out a synchronesh or whenever you open a database.

## 9.4 Carrying Out a Synchronesh.

When you carry out a synchronesh, it takes place between your current database and another database that you choose.

Select the option **Tools/Synchronesh** from the ESP menu. This will bring up a dialog box.

### The Drive List-Box

This box contains a list of all the drives that are visible to your computer. You can change the drive that is searched for ESP databases by clicking on one of the entries in this box. Note that, if the drive is slow, it may take some time for your workstation to assemble a list of available databases.

### The Database List-box.

This box contains a list of all the databases on the selected drive that are visible to your computer. Highlight the database with which you want to synchronesh.

### Entire Database

If you highlight this radio button, all the records in both databases will be synchroneshed irrespective of who owns them.

### Owned Records

If you highlight this radio-button (the default), only those records belonging to the user specified in the User-ID box will be synchroneshed. Note that a record is considered to belong to the user if it is marked with the user's ID in either database.

### The User-ID.

If you place an ESP user identifier in this control and highlight the **Owned Records** radio button then the synchronesh will only affect records, history files, correspondence etc. that belong to the specified user.

### The OK Button.

When you click on this button the synchronesh will start.

### History Files

If you un-check this box, the history files will not be updated.

### Individual Letters

If you un-check this box, individual letters will not be updated.

### 1-way

If you highlight this radio button, the update will take place in one direction only. Data on your current database will be affected. Data on the remote database will remain unchanged.

### 2-way

If you highlight this radio button, the update will take place in both directions.

## 9.5 Sychromesh and Networks

There is a background process which ESP launches to carry out any required sychromesh commands for a particular database. Sychromesh commands are contained in files whose names start with the five letters ESPWX.

The background process is launched automatically whenever ESP is started and the existence of one or more sychromesh command files is detected. It is also launched automatically whenever you search the database and the existence of one or more sychromesh command files is detected.

In addition, it is started when pass 1 of the sychromesh process is completed. If the process has already been started for the particular directory then ESP will not start a second instance.

Network users may want to start the background process on a particular workstation rather than wait for it to be started on whichever workstation comes across a task file first. This can be achieved by placing an icon for ESPWSYNC.EXE in the **STARTUP** group of the desired workstation. Set the command line to **c:\espw\espwsync -b**. The '-b' flag indicates that you want the utility to remain loaded and check the directory every few secnds for the existence of task files. The working directory should be set to the required directory. If you wish, you can specify that the process runs minimised.

## **Chapter 10 - Import and Export.**

Exporting your Current Selection

Creating Databases from ESP 5.x Files

Importing Data from ASCII Files



## **10.1 Exporting your Current Selection.**

You can make the information in your contact records available to other applications using **Tools/Export** from the ESP menu. This will bring up a dialog box which you can use to specify how the export will take place. The dialog box is described in the following paragraphs.

### **Fields to be Exported.**

You will need to decide which fields you want to be exported. In this control you can simply type the names of the fields you wish to be exported. The field names should be separated by spaces.

The order is important. The field specified at the beginning of the line will be exported at the beginning of each record, the second field specified will be exported second, etc.

### **Choose From.**

If you wish, you can pick the names of the fields you wish to be exported from this list box.

### **Export Type.**

In this box there is a list of the different type of file that can be constructed. We're not sure what SDF stands for. It's sometimes called 'quotes and commas'. Data from each field is enclosed in quotes and each field is separated with commas.

### **The OK Button**

When you press the OK button you will be asked to supply a file name for the output file. ESP will have suggested a suitable extension based on the type of file you have selected. When you have provided a filename the export will take place.

ESP will export data from your current selection of records. If your selection is large, ESP will export it fairly speedily. We cannot guarantee that other applications will deal with it speedily.

## **10.2 Creating Databases from ESP 5.x Files.**

Users of the DOS version of ESP can create a new database using their data very easily. The contact records will be converted. History files will be converted as well as possible. Individual correspondence will be converted to files which can be viewed using NotePad. Screen Masks will be converted but they will need some editing to improve their look.

The original files will not be modified or deleted in any way. They will still be available for use with the DOS version of ESP.

Select **File/Data Conversion/Create Database from ESP for DOS Files** from the ESP menu. This will bring up a dialog box which is explained below.

### **Path Name of ESP for DOS Directory (Source).**

In this control you should type the full path of the directory containing the ESP for DOS database files that you wish to convert. We apologise for not providing a pick-list but ESP DOS directories can be anywhere on your system and it takes some time to find them.

### **Destination Drive.**

In this box, ESP lists all the visible drives. Note that network drives are not visible to the Lite version of ESP. Pick the drive that you want to use for the new database.

### **Destination Name.**

In this box you should type the name for the new database. It should use no more than eight characters. The first character must be a letter. The remaining characters must be letters or digits.

### **Description.**

In this control you can type a description for the database. This description is used in future to help you choose the correct database from those you have created. Take some care to make it meaningful.

### **The OK Button.**

When you click on the OK button, your new database will be specified. Before the conversion can take place you will have to specify names for each of the fields that will be converted. This is carried out using another dialog box which is presented to you next. It is described below.

### **The Next and Previous Buttons.**

These buttons can be used to step through all the fields contained in the ESP5.x database while you decide what you want done with them.

### **Field Name.**

In this box you can provide the name for the field. It must consist of no more than eight characters. The first character must be a letter. The remaining characters must be letters or digits.

If you do not wish the field to be transferred to the new database, leave this box blank.

If you plan to use the example masks, letters and templates provided with ESP then you can save yourself a lot of customising if you use field names as follows.

Title        Mr, Mrs, Miss, Ms etc.

Initials    Initial Letters of Forenames.

Surname    Surname

Sal         Salutation e.g. 'James' or 'Mrs Brown'

Position    Position in Company.  
Company    Company Name  
Dept        Department or Division  
Address1   First Line of Address  
Address2   Second Line of Address  
Address3   Third Line of Address (if required)  
PostTown   Postal Town  
County     County  
PostCode   Post Code  
Tel          Telephone Number  
Fax          Fax Number  
TelMobil   Mobile Telephone Number  
Product    Product Interests  
Personal    Personal Interests  
Scode      Salesperson's Code

**Description.**

In this box you can edit the description of the field. It will already contain the description taken from the ESP5.x field.

**Company.**

If you want the information stored in this field to be copied (if required) when a new record is created then you should check the company check-box.

**Start Conversion.**

When you click on this button the conversion will start. When it has finished, your new database will be ready for use. You can check using **File/Open Existing Database** from the ESP menu. It will still need a certain amount of customising (see chapter 11) but it should provide a good starting point.

### 10.3 Importing Data from ASCII Files.

Most database programs can make their records available in the form of ASCII files. In addition, you may have lists of names and addresses that you have created using your word-processor. If the files that contain them are in a suitable format, ESP will be able automatically to create new records containing the relevant data.

Note that the import process will **always** make new records in your database. No attempt will be made to overwrite existing data with the data in the ASCII file.

Select **File/Import** from the ESP menu. This will bring up a standard windows file choosing dialog box.

You should choose or type the full path of the file containing the ASCII records that you wish to import. We apologise for not providing a pick-list but ASCII files can be anywhere on your system and there is no way of recognising them.

When you click on the OK button, the input file you have specified will be examined. If it is found to contain data that can be interpreted as database records, a dialog box that allows you to specify how you want the data to be imported will appear. This is explained below.

#### **Data Sample.**

This control displays a sample of the data in one of the fields found in the ASCII file. You can scroll the sample data with the scroll bars if you need to.

#### **First, Prev, Next and Last Buttons**

You can use these buttons to move from field to field within the ASCII file. As you change fields the sample data on display will change accordingly.

N.B. The displayed sample data consists of non-blank fields only. Do not expect it to aligned correctly when you change fields.

#### **Destination**

In this control you can type the name of the field that you want to accept the field on display. If you do not require the field, leave this control blank.

N.B. Some ASCII file formats use the first line to transmit the names of the fields. If this is the case and the field name given exists in your database then this control will be filled automatically.

#### **Owner**

In this control you must type the three-character ID of the user who will own the imported records. Note that the ownership of records can be changed later.

#### **FileName**

This control is for information only. It displays the name of the file containing the ASCII data.

When you have specified how you want the import to take place, press the **Start Import** button to begin the process.

## **Chapter 11 - Customising your Database.**

Introduction

Deleting Database Fields

Creating New Fields

Changing Record-Editor Screens

Creating New Record-Editor Screens

The Default Record-Editor Screen

Changing Browse-List Views

Creating New Browse-List Masks

The Default Browse-List

Changing the Quick-Find Menu Options

Customising Individual Letter Templates

Customising Form Letter Templates

Customising List Templates

Customising Label Sheets

### **11.1 Introduction.**

When you are familiar with the way ESP works you will want to create you own database and customise it to suit your exact requirements.

Creating a new database is described in chapter two. This chapter will help you to modify your new database.

## **11.2 Deleting Database Fields.**

Whether your database was created from one of ESP's internal defaults or an existing pattern, you will probably find that there are fields that you will never use. It really is best to get rid of them. They are taking up space on your disk and costing you time when you back-up and synchro mesh. There is a menu option **Contacts/Setup/Delete Field** for deleting fields. It brings up a dialog box which is described below.

### **The Field List-box.**

This box lists all the fields in the database in alphabetical order. Choose the field you think you want to delete with a single-click. The field description will appear in the description box to help you check that you have chosen the correct field. If you wish you can double-click the field name in the list-box to delete the field. You will be asked to confirm your decision before the field is deleted.

### **The Field Description Box.**

This box shows the long description of the field you have high-lighted in the field list-box.

### **The Delete Button.**

This button deletes the field you have high-lighted in the field list-box. You will be asked to confirm your decision before the field is deleted.

### **11.3 Creating New Fields.**

Creating new fields is covered fully in chapter three. This section takes you through each item of the dialog box and reminds you of a few important points.

#### **The Short Name.**

You will have to invent a single-word name for the new field using eight or fewer characters. The first character must be a letter. The remainder must be letters or digits. Sometimes this is easy (e.g. address1, address2, address3). Often it is more difficult to come up with something that will be obvious in three weeks time.

#### **The Description.**

Each ESP field can have a sixty character description. We recommend that you fill in this box when you create a new field. It can save you a lot of time later.

#### **Field Width.**

You will need to specify the width of any free text fields you create in this box. The number you specify defines the maximum number of characters that can be stored in the field.

You do not need to fill in this box for date fields, numeric fields or pick-list fields. The width of these fields is set automatically.

#### **Company Fields.**

ESP is primarily a marketing tool and in most cases, each contact will be associated with a particular company. Frequently you will have multiple contacts associated with the same company in which case, many fields (e.g. address, town, work telephone, fax, etc.) will contain the same information.

If you create a new record for another contact in the same company it will save time if these fields are copied to the new record. This is the main purpose of the company field check box. It indicates whether you want the contents of this field to be copied when you create new records.

#### **Field Type.**

Select the type for your new field carefully. You could easily make every new field a free text field but then no error checking would take place and telephone numbers would not be available to the dialler.

If the new field is a date field, remember that there are three different kinds; long date, short date and date. They are displayed and printed differently.

#### **The OK Button.**

When you have specified your new field to your satisfaction, click on the OK button to create the new field. The new field will be available for use immediately but you will have to make sure it can appear on a record-editor screen before you can enter data into it. This is covered in the following sections.



## **11.4 Changing Record-Editor Screens.**

You should be familiar with using the ESP record-editor before you attempt to change any of the screens. An ESP record-editor screen consists of a page of text containing windows into various fields of your current contact record. The text is there to provide helpful information. The windows are there so that you can edit the data in each of the fields.

What you see when you bring up the record editor is controlled by your record-editor mask. It contains the display text and signals to indicate which fields are to be displayed and where. Changing the contents of record-editor masks is described fully in chapter three.

Don't be worried about changing the contents of your current mask. You will not do any permanent harm unless you save the mask.

The mask editor is simply a text editor. It uses the normal system font. Because the font is variably spaced, you will find it impossible to line things up underneath each-other properly. Get things lined up as best you can and then check by calling up the record-editor (ctrl+R). It doesn't take many switches between the mask editor and the record-editor to get your screen looking as you want it.

### **11.5 Creating New Record-Editor Screens.**

This can be accomplished using the ESP mask editor (**Contacts/Setup/Edit Record-Editor Mask**). You can never create a record-editor mask from scratch. ESP always presents you with the current mask. When you have made the changes you require you can save it using any name you choose. It will then be available for loading at any time in the future.

## **11.6 The Default Record-Editor Screen.**

Whenever you open an ESP database, the default record-editor mask is loaded from the database. Different databases have different default masks. The default record-editor mask is always called `espw.emf`. When you customise your database, it is normal to edit the current mask to suit your exact requirements and then save it as `espw.emf`. This ensures that it is always loaded when anyone opens your database.

There are ways of making ESP behave differently from the above description. See the chapter entitled 'Advanced Techniques' at the end of this manual.

### **11.7 Changing Browse-List Views.**

As with the record-editor screen, what you see when you browse a selection of records is controlled by a mask. It consists of a single line of text that contains signals that indicate which fields are to be displayed and where. The files that control the screen view are called browse-list mask files. Changing the contents of browse-list masks is described fully in chapter three.

Don't be worried about changing the contents of your current mask. You will not do any permanent harm unless you save the mask.

### 11.8 Creating New Browse-List Masks.

This can be accomplished using the ESP mask editor (**Contacts/Setup/Edit Browse-List Mask**). You can never create a browse-list mask from scratch. ESP always presents you with the current mask. When you have made the changes you require you can save it using any name you choose. It will then be available for loading at any time in the future.

### **11.9 The Default Browse-List.**

Whenever you open an ESP database, the default browse-list mask is loaded from the database. Different databases have different default masks. The default browse-list mask is always called `espw.ebm`. When you customise your database, it is normal to edit the current mask to suit your exact requirements and then save it as `espw.ebm`. This ensures that it is always loaded when anyone opens your database.

There are ways of making ESP behave differently from the above description. See the chapter entitled 'Advanced Techniques' at the end of this manual.

### **11.10 Changing the Quick-Find Menu Options.**

There are three options in the Contacts menu that you can change if required. They are usually set to Find by Surname, Find by Company and Find by Post-Code. This can be inappropriate for some databases.

There is an option in the menu (**Tools/Customise**) which allows you to change the text of these three items and the fields that they search.

Note that the menu options are only changed for the current database. Other databases on your system are not affected.

### **11.11 Customising Individual Letter Templates.**

Check the available individual letter templates in your new database. Delete the ones you don't need. Make any new ones that you do need. Test the templates to make sure that all the fields they use have been created.



### **11.12 Customising Form Letter Templates.**

Check the available form letter templates in your new database. Delete the ones you don't need. Make any new ones that you do need. Test the templates to make sure that all the fields they use have been created.

### **11.13 Customising List Templates.**

Check the available individual letter templates in your new database. Delete the ones you don't need. Make any new ones that you do need. Test the templates to make sure that all the fields they use have been created.

#### **11.14 Customising Label Sheets.**

Check the available label sheets in your new database. Delete the ones you don't need. Make any new ones that you do need. Test them to make sure that all the fields they use have been created.

### **Choosing an ESP Function.**

You choose what to do next using the ESP menu.

If you are not familiar with the functionality of ESP then you can read the User's Guide. See [User's Guide](#)

### **Hint**

If most of the items in a menu pull-down are greyed then you have not opened a window into a database. This is accomplished using **File/Open Existing Database**.

### **Editing your Current Browse Mask.**

The browse mask controls what you see when you are viewing a selection of contacts with the ESP Record Browser. The ESP record Browser displays each selected record on a single line. Up to six fields can be displayed on the line.

You can specify the fields that you want to see in the first line of the browse mask. The other lines will be ignored. Fields are specified using their short name (e.g. Title, Surname, Address1, etc.). You do not need to use the ampersand (&) character.

You can control the amount of space allocated to each field by immediately following its name with a number of full-stops (.).

See also:

[Changing the Browse-List View](#)

**Invalid Browse Mask Header.**

Browse mask files control which fields are displayed when you browse through your selection of records. You have menu options for loading, modifying and saving browse mask files. The file you are trying to use has not been produced by ESP.

Under normal circumstances, ESP will attempt to load a browse mask file called 'espw.ebm' when you first open a database.

See also:

[Changing the Browse-List View](#)

[Changing Browse-List Views](#)

[Creating New Browse-List Masks](#)

[The Default Browse-List](#)

**Changes to browse mask.**

This dialog box is informing you that you have made some changes to your browse mask and it is asking you if you want to save the changes. If you answer 'yes' you will be presented with a standard windows file saving dialog box.

See also:

[Changing the Browse-List View](#)

[Changing Browse-List Views](#)

[Creating New Browse-List Masks](#)

[The Default Browse-List](#)

### **Browsing Your Current Selection of Records.**

When you have made a selection of contact records, they are displayed using the ESP Record Browser.

The record browser displays one record per line. Each line can show up to six fields from the record that it is displaying.

You can scroll up and down through your selection using your mouse or keyboard.

You can tag and untag records with the space-bar or a single-click of your mouse.

You can switch to the **ESP Record-Editor** by double-clicking the record you wish to edit or pressing the Enter key.



## Customising your Database Menu.

You have chosen an option that allows you to change the three quickfind options in the main ESP menu.

Using the **Field to Search** controls you can set the fields that will be searched by the menu command. In the **Text to Appear in Menu** controls you can enter the text that you wish to appear in the menu.

See also:

[Changing the Quick-Find Menu Options](#)

## **Setting Preferences.**

You have chosen an option that allows you to set the way you prefer ESP to work.

See also:

[Changing the Quick-Find Menu Options](#)

**Installation Failure.**

The ESPW installation diskette records serial number information with every copy of ESP that it installs on your disk. It has checked this information and there seems to be a problem. The ESP installation program will be able to rectify the situation.

If you do not have your installation diskette, additional copies are available to registered users from HIT Software.

N.B. The installation program will not need to re-install the ESP files. By leaving the appropriate boxes un-checked you can cause it to update the serial number file without doing anything else.

**Lite licence on heavy version.**

The ESPW installation diskette records licence number information with every copy of ESP that it installs on your disk. It has checked this information and it seems that you have used a Lite licence number with the full version of ESP. The ESP installation program on your ESP diskette will be able to rectify the situation. If you have both a Lite licence certificate and a full licence certificate then please make sure you use the correct number.

If you do not have your installation diskette, additional copies are available to registered users from HIT Software.

N.B. The installation program will not need to re-install the ESP files. By leaving the appropriate boxes un-checked you can cause it to update the serial number file without doing anything else.

**Full licence on Lite version.**

The ESPW installation diskette records licence number information with every copy of ESP that it installs on your disk. It has checked this information and it seems that you have used a Full licence number with the Lite version of ESP. The ESP installation program on your ESP diskette will be able to rectify the situation. If you have both a Lite licence certificate and a full licence certificate then please make sure you use the correct number.

If you do not have your installation diskette, additional copies are available to registered users from HIT Software.

N.B. The installation program will not need to re-install the ESP files. By leaving the appropriate boxes un-checked you can cause it to update the serial number file without doing anything else.

## **Confirm Creation of Large Group**

If you wish, you can make your whole database into a single group but it's hard to see how that could be of benefit. You are merely being warned here.

See also:

[Selection with Group Information](#)

[Excluding Records from your List](#)

**Could not Lock Database.**

ESP always locks the database while it is carrying out delicate operations. This prevents conflict with other operations and prevents problems.

Operations covered are creating new records, importing data, synchroneshing and integrity checking.

It may be that another user on your network is doing something lengthy from the above list or it may be that another application on your workstation is responsible.

### **Files in Current Working Directory not Lockable**

ESP needs to be able to lock files so that two users (or even two instances of ESP on the same workstation) can access the same database simultaneously without conflict.

This is no problem if the database is on a network because your network software provides a file locking mechanism but this is not the case with files on a local disk. To overcome the problem, DOS includes the utility SHARE which, once it has installed itself, provides a file locking mechanism for local disks. Regular users should ensure that SHARE is run every time they use their PC by putting the command SHARE in their AUTOEXEC.BAT file.

In order to run ESP now, you should quit Windows and run SHARE.



**Record Confirm Delete.**

If you choose to delete the current record it cannot be recovered. In addition, the history file and any individual correspondence belonging to the record will be deleted. None of this data can be recovered.

See also:

[Deleting Records](#)

**Access to Record Deleted by Another Process.**

Because ESP is a multi-user system, the record you are working on can be deleted by another user on a network or even by yourself using another instance of ESP.

See also:

[Deleting Records](#)

### **The Lite Version of ESP.**

The Lite version of ESP only allows you to create and maintain databases upto a maximum size of one hundred and twenty eight records each. If the lite version is used to access a large database (maintained by the full version of ESP), it will only succeed with the first one hundred and twenty eight records.

The 'Lite' version of ESP will access a database maintained by the full version but it will only examine the first block of records (at the time of writing, 128). If the contact you are looking for is in a subsequent block, it will not be found.

In addition to allowing up to 500000 records per database, the full version of ESP for Windows allows the use of third party word processors. Currently, Word for Windows, WordPerfect for Windows and AmiPro are supported.

If you wish to upgrade to the full version of ESP please contact your dealer or HIT Software.

See also:

Networking

### **Lite Version Accessing Full Database**

The Full versions of ESP allow you to have databases of upto half a million records.

The Lite version of ESP only allows you to access the first one hundred and twenty eight records of a large database.

If you wish to upgrade to the full version of ESP please contact your dealer or HIT Software.

See also:

[Networking](#)

[The Lite Version of ESP](#)

**Lite Version Full.**

The 'Lite' version of ESP will access a database maintained by the full version but it will only examine the first block of records (at the time of writing, 128). If the contact you are looking for is in a subsequent block, it will not be found.

In addition to allowing up to 500000 records per database, the full version of ESP for Windows allows the use of third party word processors. Currently, Word for Windows, WordPerfect for Windows and AmiPro are supported.

See also:

[Networking](#)

[The Lite Version of ESP](#)

**Some Contacts Already Grouped.**

Some of the contacts in your current selection of records already belong to other groups. This is not a problem. If you decide to proceed, they will be lifted out of the groups to which they belong and placed in the new group.

Note that each contact may only belong to one group.

See also:

[Selecting the Records you Need](#)

[Excluding Records From Your List](#)

[Selection with Group Information](#)

**You are not using the most recent EXE.**

Your current database has been accessed with a later revision or version of the ESP program.

Unless you have a very good reason you should stop work and install the latest version of the ESP program on your computer.

## **Deleting your Current Database**

Regrettably, this topic is not yet written



### **Confirm Delete of Current Database.**

Regrettably, this topic is not yet written

## **Database has Hidden Files**

Regrettably, this topic is not yet written

## **Database has Read-Only Files**

Regrettably, this topic is not yet written

**Database has Files that have not been Backed-up.**

Regrettably, this topic is not yet written

## **Database has System Files**

Regrettably, this topic is not yet written

**Not ESP 5 Directory.**

The name you have supplied for the directory containing the ESP for DOS files does not exist or does not contain the correct files.

See also:

[Creating Databases from ESP 5.x Files](#)

**Bad Name for File or Directory.**

The name you supply for the file or directory must consist of letters and/or digits. The first character must be a letter. ESP will look after any other bits and pieces that are needed to construct the correct name.

## **Unacceptable Size for Field**

Field size must be larger than zero and less than 200

See also:

[Creating New Fields](#)

[ESP Database Components](#)

[Creating New Database Fields](#)

[Changing Field Parameters](#)

[Deleting a Field](#)

[Editing a Field Pick List](#)



## **Converting Data from ESP 5.x**

You are specifying how you want data from an existing ESP for DOS database to be converted.

See also:

[Creating Databases from ESP 5.x Files](#)

**Could not Create New Record.**

The database access module may have reported an error during the creation attempt. Other possible reasons for failure are a full disk or inadequate permission to write to the files concerned.

See also:

[Creating New Records](#)

## **Successful Creation of New Database**

See also:

[Multiple Databases](#)

[Creating a New ESP Database](#)

## ESP Database Description

You have chosen an option that allows you to alter the description contained in the header of your current database. This is the description presented in the list of databases that you view when you select the **File/Open Existing Database** option from the ESP menu.

See also:

[Creating a New ESP Database](#)

[Multiple Databases](#)

### **Duplicate Field Name**

You are in the process of making up names for the fields of a new database. You have already used the name you have just tried.

See also:

[Creating a New ESP Database](#)

[Multiple Databases](#)

## **Choosing a Field for Parameter Changing**

You have chosen an option that will allow you to change the parameters of a field but first you must choose the field with which you want to work.

Choose the field you need with a double-click or by highlighting it and selecting OK. The description of the highlighted field will be shown in the box above the OK button.

See also:

[Changing Field Parameters](#)

[Creating New Database Fields](#)

[Deleting a Field](#)

## **Creating a New Field**

You have chosen an option that allows you to create a new field for your current database.

Remember that you will need to mention the field in your **Record-Editor Mask** so that you will be able to enter and edit the its contents.

See also:

[Creating New Database Fields](#)

[Changing Field Parameters](#)

[Deleting a Field](#)

[Creating New Fields](#)

[Changing Record-Editor Screens](#)

[Creating New Record-Editor Screens](#)

[The Default Record-Editor Screen](#)

### **Deleting a Field.**

You have chosen a menu option that allows you to delete fields from your current database.

If you delete a field you delete the whole field. The information contained in that field of **EVERY RECORD IN THE DATABASE** will be lost.

If you highlight the field you want to delete, its description will appear in the box above the cancel button. This is so that you can check that you've got the correct field.

When you're sure you have the correct field, select the **Delete** button. You will be asked to confirm before the deletion takes place.

See also:

[Deleting a Field](#)

[Deleting Database Fields](#)



**Field of Same Name Already Exists.**

A field of the name that you have typed already exists. You will have to choose a different name.

See also:

[Creating New Database Fields](#)

[Changing Field Parameters](#)

## **Changing the Parameters of a Field**

You have chosen an option that allows you to change the parameters of a field in your current database.

You can attempt to make any changes that you wish. Some changes will be disallowed.

See also:

[Changing Field Parameters](#)

[Creating New Database Fields](#)

## **Creating a New Database**

You have chosen a menu option that allows you to create a brand new ESP database.

See also:

[Multiple Databases](#)

[Creating a New ESP Database](#)

[Deleting ESP Databases](#)

## **Creating a New Database from ESP 5.x Files**

You have chosen a menu option that allows you to create a brand new database by converting data from an existing ESP for DOS database.

See also:

[Creating Databases from ESP 5.x Files](#)

[Multiple Databases](#)

[Creating a New ESP Database](#)

[Deleting ESP Databases](#)

**No Record to Copy.**

When you create a new record you can choose to have the contents of certain fields copied to the new record from the current record. You request this by checking the Copy Company Fields check box.

The copy cannot take place unless you have selected at least one record.

See also:

[Copying Existing Records](#)

[Creating New Records](#)

[Entering Data into a New Record](#)

[The Record Editor](#)

**No name given for new database.**

You are in the process of filling in the dialog box to specify a new database.

You must supply a name for the database. The name can be up to eight characters long. The first character must be a letter and the others must be letters or digits.

See also:

[Multiple Databases](#)

[Creating a New ESP Database](#)

[Deleting ESP Databases](#)

**Unacceptable name for field.**

The name that you have typed for the new field you are about to create is unacceptable. It should consist of no more than eight characters. The first character must be a letter. The other characters used should be letters or digits only. Do not type any spaces.

This may seem a bit restrictive but the name you choose will have to be compatible with a variety of word-processors as well as ESP.

The name you type will be used to identify the field.

See also:

[Changing Field Parameters](#)

[Creating New Database Fields](#)

[Deleting a Field](#)

**No Type Given for New Field.**

ESP cannot create the new field until you have chosen a type for it. Choose the type you need from the list displayed.

See also:

[Creating New Database Fields](#)

[Deleting a Field](#)



### **Opening a Window into a Database**

You have chosen a menu option that allows you to open a window into another (or the same) ESP database.

You can have nine windows open simultaneously if you wish.

Choose the database you wish to access by double-clicking it or highlighting it and selecting it with the OK button.

See also:

[Multiple Databases](#)

## **Creating a New Record**

You have chosen a menu option that allows you to create a new record in the current database.

See also:

[Creating New Records](#)

[Copying Existing Records](#)

[Entering Data into a New Record](#)

[The Record Editor](#)

### **Cannot change the size of this type of field**

Fields of certain types do not have variable sizes.

A date field is always eight characters wide (YYYYMMDD). The size of numeric fields depends on the type of number it is intended to store.

See also:

[Changing Field Parameters](#)

[Creating New Database Fields](#)

[Deleting a Field](#)

**You must specify at least one field to be converted.**

You need to go through all the fields in your DOS database and decide whether or not you need them in your new ESP for Windows database.

If you need a field then you must make up a name for it. There is a list of recommended names in the user guide and the online help.

See also:

[Creating Databases from ESP 5.x Files](#)

**Conversion errors when changing field parameters.**

Overflow errors can occur if you have reduced the size of the field. If the content of any fields was too long it will have been truncated.

Conversion errors can occur when you have changed the type of the field. If the content of the original field makes no sense in the new field it will be ignored and the field will be left blank.

**Changing the Current Data Entry Order.**

When you are entering data into new records you can make things easy for yourself by setting up an entry order file.

The entry order file simply controls which field is moved to next when you press the Enter key.

The entry order file is nothing more than a list of field names (e.g. Title, Surname, Address1, etc.). Each field name is on a separate line.

See also:

[Entering Data into a New Record](#)

## **Invalid Entry Order File Header**

Entry order files are used by the record editor. They define which field gets the focus when you press the ENTER key. Most users set up an entry order file so that entering data in a new record is simplified. You have menu options for loading, modifying and saving entry order files. The file you are trying to use has not been produced by ESP.

Under normal circumstances, ESP will attempt to load an entry order file called 'espw.eeo' when you first open a database.

See also:

[Entering Data into a New Record](#)

[The Record Editor](#)

**Saving entry-order changes.**

When you are entering data into a new record you can use the enter key to move to the next required field. The field that the focus moves to is controlled by the field entry-order. You can change the field entry-order using the option in the *FileEntry-Order* menu.

This dialog box is informing you that you have made some changes to the current field entry-order and it is asking you if you want to save the changes in a file. If you answer 'yes' you will be presented with a standard windows file saving dialog box.

ESP field entry-order files have the extension '.eeo'. When you open a new database, ESP looks for an entry-order called 'espw.eeo' and loads it if it exists. This allows you to customise this database.

See also:

[Entering Data into a New Record](#)

[The Record Editor](#)



**Word is not a field name in this database.**

One of the words you have typed is not the name a field in the database you are working in.

See also:

[Exporting your Current Selection](#)

### **Choosing a name for the export file**

You are being asked to provide a name for the file to accept the exported data.

See also:

[Exporting your Current Selection](#)

## **Exporting Contact Records**

You have chosen an option that will allow you to 'export' data from your current selection of records to a file which can be used by other applications.

See also:

[Exporting your Current Selection](#)

**Globally Append Data to Field Contents.**

You have chosen an option which will allow you to append data to the contents of a field across the whole database or across your current selection of records.

See also:

[Global Operations](#)

**Globally Clear Field Contents.**

You have chosen an option which will allow you to clear the contents of a field across the whole database or across your current selection of records.

See also:

[Global Operations](#)

**Global Confirm.**

Once the data is changed there is no going back.

See also:

[Global Operations](#)

**Globally Change Field Contents.**

You have chosen an option which will allow you to change every occurrence of the given word or phrase across the whole database or across your current selection of records.

See also:

[Global Operations](#)

**Globally Set Field Contents.**

You have chosen an option which will allow you to set the contents of a field across the whole database or across your current selection of records.

See also:

[Global Operations](#)



### **Editing your History File Pick-List**

Your history file pick-list is simply a list of phrases that you use frequently in your history files.

The pick-list editor is a standard Windows multi-line edit control. Each paragraph corresponds to one phrase.

The phrases you put together should not be more than two thousand characters long.

**Invalid History Picklist File Header.**

History picklist files define the options available for you to pick when you are editing a history file entry. You have menu options for loading, modifying and saving history picklist files. The file you are trying to use has not been produced by ESP.

Under normal circumstances, ESP will attempt to load an entry order file called 'espw.ehp' when you first open a database.

### **Changes to history file pick list.**

This dialog box is informing you that you have made some changes to your history pick list file and it is asking you if you want to save the changes. If you answer 'yes' you will be presented with a standard windows file saving dialog box.

See also:

[What are History Files?](#)

[Adding a New History File Entry](#)

[Automatic History File Entries](#)

[Viewing History Files](#)

[Printing History Files](#)

[Modifying a History File Entry](#)

### **Selecting Records with History File Action Date-times.**

You have chosen an option that allows you to select database records using the action dates in their history files.

See also:

[Selecting the Records you Need](#)

[What are History Files?](#)

[Viewing History Files](#)

Regrettably, this topic is not yet written

**Modifying a History File Entry.**

You have chosen an option which will allow you to modify an entry in the history file belonging to your current record.

See also:

[Modifying a History File Entry](#)

[Viewing History Files](#)

[What are History Files?](#)

### **Creating a New History File Entry.**

You have chosen an option which allows you to create a new history file entry for your current record.

See also:

[Adding a New History File Entry](#)

[Automatic History File Entries](#)

[Viewing History Files](#)

[What are History Files?](#)

**Integrity Report File Inaccessible.**

The integrity report file for the database you are using is generated each time that you check it's integrity.

You will not be able to view it if it has not been generated, if another user is currently generating a new one or another user is viewing it.

See also:

[Checking the Integrity of your Database](#)



## **Checking the Integrity of your Database.**

From time to time you may wish to check the integrity of your database.

ESP for Windows is, to a certain extent, self checking. If problems have occurred (e.g. due to an unexpected power failure), ESP will usually detect them and ask you to run the integrity checker. Some problems are not detectable during the normal course of operations. The integrity checker, however, will find all problems.

There is an option **Tools/Check Database Integrity** in the ESP menu which brings up the dialog integrity checker dialog box.

The contact records will always be examined. Repairs will only be attempted if you have checked the **Attempt Repairs Checkbox**.

Unconnected individual letters and history files are files that belong to records that you have deleted. They are normally deleted at the same time as their 'parent' records but abnormal circumstances can stop this happening. They should be deleted because they are taking up space on your disk and are of no use without their parent record. They will only be deleted if you have checked the appropriate boxes.

A complete report of any errors found and any actions taken is assembled in a file and NotePad is launched so that you can view, print or copy it. There is also a menu option **Tools/View Integrity Check Report** for viewing the most recent report at any time.

**Error in input file for import.**

There is something wrong with the given line of the input file.

Possible causes are as follows:

The line has more or fewer fields than the previous lines in the file.

Opening quotation marks not matched by closing quotation marks (SDF only).

Missing comma in SDF (quotes and commas) file.

Too many fields in a line of the input file.

Numeric field in previous lines is matched with non-numeric field in given line or vice-versa (SDF only).

**Choosing the input file.**

You have chosen a menu option that will allow you to 'import' data. Importing data is similar to creating new records and entering data into them except that it is all done automatically using data from a file.

The dialog box on display is expecting you to name or choose the file containing the data.

**Ascii data file does not seem to contain data records.**

ESP has analysed the file. It does not seem to be any in of the following formats.

AmiPro data records.

ASCII comma delimited.

ASCII SDF (quotes and commas).

ASCII tab delimited.

**Specifying import of Ascii data file.**

ESP has analysed the input file and is displaying some sample data from one of the fields.

Use the **First**, **Prev**, **Next** and **Last** buttons to view sample data from other fields.

You must specify the **Destination** field for each field of data that you wish to import. If you do not wish to import the data in a particular field then leave the **Destination** control blank.

When you are ready, press the **Start** button to begin the importation of data. Once the import has started you will not be able to cancel it.

See also [Importing Data from ASCII Files](#)

**Not enough spare space on disk.**

ESP has analysed your disk and thinks there is not enough space to carry out the import safely.

**Must provide valid owner ID for new records.**

All records in an ESP database must be 'owned' by an identified user. Three letters are used as identifiers.

**Tip** It may be a good idea to use an unassigned ID for the new records that the importing process will create (e.g. NEW or IMP). In this way, you will be able to select them easily for classification and reassignment to their rightful owners.

See also:

[Record Ownership](#)

[Transferring Record Ownership](#)

**Duplicate destination field name**

You have already used the field specified once. Either change the destination field for this field of data or use the **Prev** button to find the previous instance and change that.

Remember that you can leave the destination box blank if you wish. This indicates that you do not want to import the particular field of data.



**Not field in this database.**

The name you have supplied for the field to accept the data is not the name of a field in your database.

## **About Installing ESP**

The ESP installation process is governed by two dialog boxes. The first asks you for your ESP licence number. The second allows you to specify how you want the installation to take place.

Nothing will be written to your computer's disk until you have seen them both and given them both the OK. You can cancel the installation process at any time.

See also:

[Installation - Technical Details](#)

## **Hardware Requirements for ESP**

ESP can run on any IBM compatible computer which is capable of running Windows 3.1 or higher.

The recommended minimum requirement is a 386 based PC with four megabytes of RAM although we have successfully tested it on a 286 based PC with one megabyte. This is very slow. The requirements of the Windows versions of Word, WordPerfect and AmiPro call for a 386 PC with four megabytes of RAM or better. A specification lower than this should only be considered if Write is the preferred word processor and your database is going to be small.

If you would like advice on the best hardware solution for your requirements, any of our many ESP re-sellers will be pleased to help. Alternatively, because we at HIT Software do not supply hardware, we will be pleased to offer impartial advice.

**Supplying your ESP Licence Number.**

You (or your company) must have a licence to use ESP. ESP will not run unless you supply a licence number. The sharing of licence numbers is not allowed.

Single-user licence numbers will be found among the documentation supplied in the pack.

Muti-user licence numbers will have been allocated when the multi-user licence was purchase from the dealer or HIT Software. If you work for a company that has purchased a multi-user licence you will have to ask the person who supervises your computer system for the licence number and your workstation number.

Please type your licence number carefully. If you make a mistake it may not be detected until you try to run ESP (in which case you will be asked to run the installation process again). Note that ESP licence numbers consist of three letters, three digits, three letters, three digits, three letters and three digits.

See also:

[Installation - Technical Details](#)

**Error in Licence Number.**

The installation process has detected an error in the licence number you have entered.

See also:

[Supplying your ESP Licence Number](#)

## **Installing ESP for Windows**

You can use the specification dialog box to provide the information needed by the installation process. Please supply the following details.

### **Destination Drive**

If your computer has more than one drive then you can use this list box to specify the one that you want ESP to be installed on. Make sure that the required drive is highlighted.

### **Install Program File**

Make sure this box is checked if you want the ESP program file copied to the destination drive. New users should always check this box.

### **Install Help File**

Make sure this box is checked if you want the ESP help file copied to the destination drive. New users should always check this box.

### **Install Examples**

The ESP installation diskette contains several example ESP databases. Check this box if you want them copied to the destination drive. New users should always check this box. The example databases are referred to in the User's Guide and aid the learning of ESP.

### **Update Licence Number**

ESP expects to find your product licence number in a special file on your computer. If it does not find it, it will not run. Check this box to update or install your licence number onto your computer.

### **Company/Name**

Single-user licence operators can leave this box blank if they wish. Multi-user licence operators must enter their company name using the exact form that was specified when the multi-user licence was applied for.

### **Workstation number**

Single-user licence operators will not be asked for a workstation number. Multi-user licence operators will need to provide the number that has been allocated for their workstation. Contact the person supervising your computer system if you are unsure what the number is.

### **The OK Button**

When you are ready, press the OK button to start the installation process.

See also:

[Installation - Technical Details](#)

**DDE Failure with ProgMan.exe**

Ordinarily, the installation program would communicate with Program Manager to create a group for ESP in which icons to access the example databases would be placed.

For some reason, this process failed. Perhaps you have deleted ProgMan.exe from your system.

**Copy files failure.**

Please check that there is enough spare space on the chosen disk before trying again.

If this is not the problem, please check that you have permission to create directories and copy files on the chosen drive.



**Setting the workstation number.**

Because this is a multi-user licence you are being asked for the number of the workstation onto which you are installing ESP.

Multi-user licences are provided for company users. It is a condition of their use that each workstation has its own, unique number within the given range.

See also:

[Installation - Technical Details](#)

**Bad Company Name or typo on serial number.**

The company name that you have entered must be identical to the company name that was supplied when the multi-user licence was purchased.

If you are sure that you have not made a mistake then it's possible that you made a mistake with the serial number.

Multi-user licences are provided for company users. It is a condition of their use that the displayed company name is not changed.

See also:

[Installation - Technical Details](#)

## **Installation - Technical Details**

The installation process creates a directory called ESPW on the destination drive.

The program file (ESPW.EXE) and the help file (ESPW.HLP) are copied to the directory ESPW on the destination drive.

The example databases are created as sub-directories in the directory ESPW on the destination drive.

A section called ESPW is created in your WIN.INI file.

Your licence number is encoded into the ESPW section of your WIN.INI file.

If appropriate, the workstation number is encoded into the ESPW section of your WIN.INI file.

**Multiple ESP Windows.**

We have imposed an arbitrary limit of nine on the number of ESP windows you can have active at one time.

See also:

[Multiple Databases](#)

[Re-active Prospecting](#)

**Clearing your Label Queue.**

You have chosen a menu option which allows you to clear your label queue.

The dialog box shows you details of your label queue.

If you wish to clear it, select the **Delete** button.

Remember that your label queue is not automatically deleted. It is up to you to clear it after you have successfully printed your labels or at any other time.

See also:

[Label Generating with Write](#)

**Confirm Label Queue Print**

You have chosen to generate labels for your current label queue. ESP is displaying your label queue status so that you can check it before proceeding.

Remember that your label queue is not automatically deleted. It is up to you to clear it after you have successfully printed your labels or at any other time.

See also:

[Label Generating with Write](#)

**Display Label Queue Status**

You have chosen an option which will display your label queue status.

Remember that your label queue is not automatically deleted. It is up to you to clear it after you have successfully printed your labels or at any other time.

See also:

[Label Generating with Write](#)

## **Editing your Record-Editor Mask File**

The mask file editor is a standard Windows multi-line edit control.

Each line in the mask file corresponds to one line on the record-editor screen.

See also:

[The Record Editor Mask](#)

[The Record Editor](#)



**Invalid Record-editor Mask File Header.**

Record-editor masks define what is displayed on the screen when you edit a record. You have menu options for loading, modifying and saving screen mask files. The file you are trying to use has not been produced by ESP.

Under normal circumstances, ESP will attempt to load a record-editor mask file called 'espw.emf' when you first open a database.

See also:

[Changing the Browse-List View](#)

[Changing Browse-List Views](#)

[Creating New Browse-List Masks](#)

[The Default Browse-List](#)

**Saving record editor mask changes.**

This dialog box is informing you that you have made some changes to a record-editor mask and it is asking you if you want to save the changes. If you answer 'yes' you will be presented with a standard windows file saving dialog box.

See also:

[The Record Editor](#)

[The Record-Editor Mask](#)

## **Entering your User ID**

You must provide your own three-letter identifier before you can use ESP. It has various uses e.g. to mark records that you own and to name your label queues files.

See also:

[Portable Computing](#)

### **Changing the Registered Owner of Contact Records**

You have selected an option which will allow you to change the ownership of contact records. The function will change the ownership of your current record or your current selection of records. This depends on which radio button is highlighted.

Type the three-letter ID for the new owner into the box before you select the OK button.

### **Multiple Instances of ESP.**

This message is supplied to remind you that you are running at least two instances of ESP. Each instance can be thought of as a window. You can switch between instances using the **Window** option from the ESP menu.

See also:

[Multiple Databases](#)

[Re-active Prospecting](#)

### **Editing a Field Pick-List**

A field pick-list is simply a list of phrases that you can use in a field that is of the type 'Pick-List'.

The pick-list editor is a standard Windows multi-line edit control. Each paragraph corresponds to one phrase.

The phrases you put together should not be longer than the size of the field.

**Bad format pick-list.**

ESP has examined a file that it was expecting to be a pick-list file and has found some problems with it. ESP pick-list files are binary files and can only be edited using ESP. They consist of a small header followed by each of the items in the list.

**Remedy:** Edit the pick-list for the field in question regardless (using the option in the /Field Pick Lists menu). When you have saved the file the problem will be cured.

See also:

[Editing a Field Pick List](#)

**Saving pick-list changes.**

This dialog box is informing you that you have made some changes to a pick-list file and it is asking you if you want to save the changes. If you answer 'yes' the pick-list will be saved.

Note that you will not be asked to choose a file name. ESP automatically links each pick-list with its corresponding field.

See also:

[Editing a Field Pick List](#)



### **Using the ESP Record-Editor.**

The ESP record-editor provides a window into your current contact record. It displays fields of information from the record laid out in a screen view. You can change the screen view if you require.

### **Moving From Field to Field.**

You can move the caret into any of the fields on display with a single click of the mouse. You can also use the tab key to move to the next field (shift+tab moves to the previous field).

The **Enter key** takes you to the next field for data entry. This depends on the current entry order.

Double-clicking on a field displays information about the field in an OK dialog box;

See also:

[The Record Editor](#)

[Entering Data into a New Record](#)

[The Record-Editor Mask](#)

**Record-Editor Field Information.**

The dialog box on display is showing information about the field you have just double-clicked.

See also:

[ESP Database Components](#)

[Creating New Database Fields](#)

[Changing Field Parameters](#)

**Bad Pick-List file.**

The field into which you have just moved is a pick-list field. ESP has opened the corresponding pick-list file and found some inconsistencies.

Use **File/Field Pick-Lists/Edit Pick-List File** to examine the file. The Pick-List Editor will rectify any problems it finds.

**Difficult or ambiguous date format.**

Generally speaking, what you type as a date for ESP must be capable of being interpreted unambiguously but you can use wild-cards (see below). ESP will accept several forms of a date as demonstrated in the following list.

15 Jan 1994

Jan 15 1994

15 jan 94

15 1 94

15 1 1994

If you use wildcards then the displayed text of each date is examined in the search. Remember that the displayed text of a date field depends on the type (LongDate, ShortDate or Date) and your Windows International settings.

See also:

[Selecting the Records you Need](#)

**Selecting Records using a Filter.**

You have selected an option which will allow you to select records from your list of contacts using a filter.

The operation of the ESP filter is described fully in [Selecting the Records you Need](#)

**Use of wild-cards in a range.**

You have specified a range for a database search of some kind. Ranges are defined with the following signs:

- > Greater than.
- >= Greater than or equal to.
- < Less than.
- <= Less than or equal to.

If you have used any of these signals then ESP will attempt to interpret the text you have typed as a range.

You cannot use wild-cards (stars and question-marks) at the same time as a range.

See also:

Selecting the Records you Need

**Quick Finder.**

You have selected an option which will perform an easy-to-specify search of your contact records.

You can carry out more complicated searches of your records using filters.

See also:

[Finding and Viewing Records](#)

**Excluding with a filter.**

You have selected an option which will allow you to exclude records from your current selection using a filter.

The operation of the ESP filter is described fully in [Excluding Records From Your List](#)



**Sorting your current list of contacts.**

You have selected an option which allows you to sort your current selection of contacts. This function does not make any changes to your database; it simply modifies the order in which your list of contacts is displayed.

You can specify three fields to use in the sort and you can make the function sort backwards if you wish.

See also:

[Sorting your Selection](#)

**Loading a disk-based selection.**

You have selected an option which will replace your current selection with one that you have assembled previously and saved to disk. This dialog box is asking you to specify the file that contains the selection.

See also:

[Disk Based Selections](#)

[Selecting the Records you Need](#)

**Saving a Selection to Disk.**

You have selected an option which will allow you to save your current selection to disk. This dialog box is asking you to specify a name for the file that will be created.

Note that this function only saves a list of references to the contact records in your selection. It does not save any other data.

See also:

[Disk Based Selections](#)

[Selecting the Records you Need](#)

**Saving a Selection to Disk.**

You have selected an option which will allow you to save your current selection to disk. This dialog box is asking you to specify a name for the file that will be created.

Note that this function only saves a list of references to the contact records in your selection. It does not save any other data.

See also:

[Disk Based Selections](#)

[Selecting the Records you Need](#)

**Could not launch ESPWSYNC.EXE**

ESP has failed to launch the background process that reads files created by the synchromesher and acts upon instructions contained within the file. The file containing the executable process is called ESPWSYNC.EXE and it should be in the same directory that contains the executable file for ESP (ESPW.EXE).

The required background processing will not take place and the synchromesh will not be completed.

## **Synchromeshing two databases.**

This function will synchromesh your current database with another ESP database of your choice. The other database must be accessible to your computer. It can be on a local drive, a network drive, a drive connected with MicroSoft InterLink or even a removeable (floppy) drive.

Normally, only those records belonging to you will be synchromeshed. Your records are marked with your three-character ID which is displayed in the user-ID edit control. You can change the contents of the user-ID control if you wish. If you wish, you can select the 'All Records' radio button so that the synchromesh operates on all records in the two databases irrespective of who owns them.

Note that the synchromesh process relies on the accuracy of the clocks on the computers that maintain the databases. It is important to check the accuracy of your computers' clocks frequently if you intend to use the synchromesh function. If you are travelling with any of your computers or otherwise using any of them in different time zones then you must check that their perception of GMT is accurate. This can be checked with the **Tools/Check Timezone** option in the main menu.

The synchromeshing process will carry out the following actions.

1. Each record of each common field in both databases will be updated with the latest information.
2. Every history file in both databases will be updated with the latest information.
3. New individual letters will be copied to the other database. Individual letters existing in both databases will be compared. If they differ in any way the oldest will be over-written with the newest.

N.B. It can be the case that a record is marked as belonging to one user in one database and marked as belonging to another user in the other database. In these cases, a record is synchromeshed if either database considers that you own the record.

See also [Chapter 9 - Synchromeshing](#) and [Carrying Out a Synchromesh](#)

**Cannot get exclusive access to remote database.**

Someone must be using the remote database. The syncromeshing process requires exclusive access to it. Please try again later.

See also [Chapter 9 - Syncromeshing](#)

**Cannot get exclusive access to your current database.**

Someone must be using your current database. The syncromeshing process requires exclusive access to it. Please try again later.

See also [Chapter 9 - Syncromeshing](#)



**Local database has serious integrity problem.**

There are problems with your current database. Use the integrity checker to sort them out.

See also [Chapter 9 - Synchroneshing](#)

**Remote database has serious integrity problem.**

There are problems with the remote database. Get the person in charge of the remote database to use the integrity checker to sort it out.

See also [Chapter 9 - Synchroneshing](#)

**Cannot synchro from root directory.**

In general, ESP expects the data files with which it is working to be in a sub-directory. In some cases, it may appear that the data files are in the root directory of a network drive. In these cases, ESP cannot carry out the synchro mesh because it cannot get access to the task directory (a same level directory with the same directory name but with the extension .ETD).

See also [Chapter 9 - Synchromeshing](#)

**Duplicate Reference Number in Remote Database.**

For some reason there are two records with the same internal reference number in the remote database.

The synchromesh cannot proceed because it relies on the reference numbers to identify records.

The integrity checker must be run on the remote database to rectify the problem.

See also [Chapter 9 - Synchromeshing](#)

**Duplicate Reference Number in Local Database.**

For some reason there are two records with the same internal reference number in the local database.

The synchro mesh cannot proceed because it relies on the reference numbers to identify records.

The integrity checker must be run on the local database to rectify the problem.

See also [Chapter 9 - Synchromeshing](#)

**Duplicate licence number on synchro.edi espw.c**

Every workstation using ESP must have its own licence.

Licences to install and use ESP are issued by HIT Software. Each licence is identified with a unique number. Single-user licences and multi-user licences can be purchased from your dealer or from HIT Software. A single-user licence permits the installation and use of ESP on one workstation only. Multi-user licences are available for companies and organizations. These permit the installation and use of ESP on the agreed number of workstations.

The licence number for each workstation is entered when ESP is installed. If the licence is multi-user then the workstation number is also entered at the same time.

There is an option in the installation program (on your ESP diskette) to install a legal licence number without copying the software.

Single-user licences permit the use of one workstation only.

Multi-user licences permit the use of the agreed number of workstations. Each workstation must be identified with its own, unique number. The combination of the licence number and the workstation number permit the use of one workstation only.

ESP Version 6.0 Copyright (C) 1994 HIT Software, PO Box 2, Farnborough, Hants, England.

This software is protected by international treaty provisions and applicable national laws. Reproduction in any form, in whole or in part is expressly prohibited. Any infringement of copyright will be pursued to the full extent of the criminal and civil law. Interference with the software using compilers, de-compilers or any software tools is expressly prohibited. Renting or leasing of the software is prohibited. Transfer of the software on a permanent basis is allowed providing it is transferred with the licence, diskettes and documentation.

**Synchromeshing all done.**

This function has synchromeshed your current database with another ESP database of your choice. The other database must be accessible to your computer. It can be on a local drive, a network drive, a drive connected with MicroSoft InterLink or even a removeable (floppy) drive.

A background process will now make any required changes to your current database.

The background process to make the required changes to the remote database may already be running. If not, it will be started the next time that the database is accessed.

See also [Chapter 9 - Synchromeshing](#)

**Synchromesh pass 2.**

Pass 2 of the synchromeshing process is carried out in background by this utility.

This utility takes commands and data from 'task files' produced by the first pass and makes any necessary modifications to the database. (The first pass is carried out from the main ESP menu). It also appends lines to the report file for the database which is displayed in the main window. Task files are removed when they have been successfully processed.

Only one instance of this utility can be running for any given database.

It is not strictly necessary for you to start this utility. It is launched automatically whenever ESP is started and the existence of one or more task files is detected. It is also launched automatically whenever ESP the database is searched and the existence of one or more task files is detected. It is also started when pass 1 of the synchromesh process is completed. If the process has already been started for the particular directory then ESP will not start a second instance.

See also [Chapter 9 - Syncromeshing](#)



**Confirm activity.**

If you are not sure about this question answer NO and ask!

You should be able to estimate how many new records the syncromesh will need to create on the remote remote database. If the figure given in the message is significantly different then answer NO and start again, making sure that you set the parameters correctly. Perhaps you have chosen the wrong remote database or maybe you have entered the user ID incorrectly.

Estimating how many new records the syncromesh will need to create on your current database is more difficult but if the figure given in the message is unexpected then answer NO and start again, making sure that you set the parameters correctly. Perhaps you have chosen the wrong remote database or maybe you have entered the user ID incorrectly.

See also [Chapter 9 - Syncromeshing](#)

**Confirm start pass 2.**

Pass 2 of the synchroneshing process is carried out in background by a separate utility.

This utility takes commands and data from 'task files' produced by the first pass and makes any necessary modifications to the database. (The first pass is carried out from the main ESP for Wndows menu). Task files are removed when they have been successfully acted upon.

See also [Chapter 9 - Syncromeshing](#)

## Setting your Time Zone

When you set the time on your computer you are setting the local time.

Very few applications need a world-wide time reference so this is rarely a problem but ESP uses Greenwich mean time when it date-time stamps correspondence files, history file entries and contact record fields. If it didn't use a world-wide time reference then the synchromesh facility would be unreliable for any users travelling with their database.

The ESP time-zone dialog box does not alter your computer's clock; it simply informs you about your computer's perception of the current Greenwich-mean-time.

You can control your computer's perception of the current Greenwich mean time by setting a TZ environment variable. This is best done with a line in your computer's autoexec.bat file but network supervisors might want to make a different arrangement. The format of the TZ environment string is as follows:

***TZ=zzz[/-]d[d][///]***

zzz is a three-character string representing the name of the current time zone. All three characters are required. For example, the string "BST" could be used to represent British summer time.

***[/-]d[d]*** is a required field containing a number with one or two digits. The number may be signed if required. This number is the local time zone's difference from GMT in hours. Positive numbers adjust westward from GMT. Negative numbers adjust eastward. For example:

0 = GMT,  
-1 = continental Europe,  
5 = EST and  
8 = PST.

***///*** is an optional three-character field that represents the local time zone daylight saving time. If this field is present, it will cause fairly unpredictable adjustments to be made to the calculations. It is best left blank unless you have other applications that use it.

If you do not set the TZ environment variable, the operating system (not ESP) assumes TZ = EST5EDT which is not overly helpful for european users.

We recommend:

TZ = GMT0 for Greenwich mean time and  
TZ = BST-1 for British summer time.

**WP file in use by another application.**

The file you want to edit is being edited by another application (or another instance of ESP). It is not advisable for you to copy or edit the file until it is fully available again.

Technically speaking the file is locked.

If the database you are using is on a network drive then it could be that another workstation is editing the file. If this is not the case then have a word with you network manager.

If the database you are using is on a local drive, file locking is managed by the DOS utility SHARE. It could be that you are editing the file with another application in which case the solution is easy. Quit the other application. If this is not the case then it would seem that SHARE has got itself confused. The only remedy is to re-boot your computer.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

**WP File contains refs to non-existent fields.**

Obviously, ESP can only merge data from fields that actually exist. The most likely explanation for the problem is a typing error in the template document.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

## **Unrecognised WP file format**

ESP only recognises AmiPro, Word for Windows, Word Perfect and Write files.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

**Bad name for creating a file with.**

The name you make up should consist of eight characters only. The characters used can be numbers or letters. No other characters are allowed. ESP will append the correct file extension and make sure that the file is stored in the correct directory.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

**Bad or not specified name for WP source file.**

Whenever ESP creates a new word processor file for you, it needs to copy an existing one. You must do this even if you want a blank page.

If you are not being presented with a list of files to choose from then there is something wrong with the database you are using. There should at least be a file called DEFAULT for each word processor.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)



**Word Processor in Use.**

You have started a copy of your word processor from this instance of ESP (presumably to edit a document). This instance of ESP will not terminate until you have finished with word processor. You will have to switch to the word processor to terminate it.

One way of switching to the word processor window is by holding down the control key and repeatedly pressing the tab key until the caption bar you require is displayed. At this point, releasing both keys will switch you to the required window.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

### **Could not copy WP file**

ESP was attempting to copy a word processor file for you to modify for a new purpose but the copy failed.

Possible causes:

Insufficient disk space for the output file.

Insufficient memory for the required buffers.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

**Delete the files you have selected**

This is your last chance to say no. If you answer YES the files you have selected will be deleted. You will not be able to recover them.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

## **Write File Descriptions**

You are in the process of setting or changing the description of a Write file.

Write files do not normally have descriptions so ESP has to look after them for you.

See also:

[Using Write with ESP](#)

**Creating a New Form Letter.**

You have selected an option that allows you to create a new form letter for use with your current database.

See also:

[Creating a New Write Form Letter](#)

**Deleteing Form LEtters.**

You have selected an option that allows you to delete form letters from your current database.

See also:

[Deleting Write Form Letters](#)

You have selected an option that allows you to edit form letters belonging to your current database.

See also:

[Editing Write Form Letters](#)

**Mail-Merge**

You have selected an option that allows you carry out a mail-merge using a form letter and your current selection of records.

See also:

[Mail-Merging with Write](#)



**WP File contains too many references to database fields**

There are too many references to database fields in the style file that ESP is copying. There is a limit of two hundred and fifty six.

See also:

[Individual Letters with Write](#)

[Mail-Merging with Write](#)

[Label Generating with Write](#)

[List Generating with Write](#)

## **Headers and Footers in Write Merge files.**

ESP will not construct a 'Write' mail merge file if the form letter has headers or footers. You will have to use a third party word-processor (e.g. Word, WordPerfect or AmiPro), if you want your mail merge letters to have page numbers etc. 'Write' can only number pages from start to finish of the document which is not what is generally expected for multiple copies of the same letter.

You will have to prepare a form letter without headers or footers. Unfortunately, editing the letter and clearing the header or footer will not do. Write still considers that they are there. Cut and paste from the old letter to the new one is the best method if want to avoid retyping the whole letter. You will have to remove the offending header or footer by editing the form letter.

See also:

[Individual Letters with Write](#)

[Mail-Merging with Write](#)

[Label Generating with Write](#)

[List Generating with Write](#)

**Lite Version Only Supports Write.**

The full version of ESP allows you to use Word for Windows, AmiPro for Windows or WordPerfect for windows for all your correspondence. In addition, the full version has many other advantages.

N.B. Word, AmiPro and WordPerfect are all capable of acting as OLE (Object Linking and Embedding) servers which makes them particularly suitable for use in an application such as ESP.

**Make History YesNo box after individual letter.**

If you answer 'Yes' you will get the chance to make an entry in the history file belonging to the current record.

The 'Make New Entry' dialog box will be ready loaded with a description of the individual letter you have just been working on.

You will be able to add comments of your own and set an action date if you wish.

See also:

[Individual Letters with Write](#)

[Mail-Merging with Write](#)

[Label Generating with Write](#)

[List Generating with Write](#)

**Make History YesNo box after mailmerge.**

If you answer 'Yes' you will get the chance to make a single entry which will be placed in the history files belonging to your current selection of records.

If you abandoned the mail-shot then you will probably answer 'No'. If not, you may care to record that the mail-shot letter has been sent. The 'Make New Entry' dialog box will be ready loaded with a description of the form letter you have just used for the mail-shot. You will be able to add comments of your own and set an action date if you wish.

See also:

[Individual Letters with Write](#)

[Mail-Merging with Write](#)

[Label Generating with Write](#)

[List Generating with Write](#)

### **Create Individual Letter**

You have chosen an option that will allow you to create an individual letter for your current contact.

See also:

[Creating a Write Individual Letter](#)

[Individual Letters with Write](#)

**Deleting Individual Letters.**

You have chosen an option that will allow you to delete individual letters that have been created for your current contact.

See also:

[Deleting Write Individual Letters](#)

**Editing Individual Letters.**

You have chosen an option that will allow you to edit individual letters that have been created for your current contact.

See also:

[Editing Write Individual Letters](#)



**Incorrect Format in File**

ESP can tell whether word-processor files are genuine by looking for known signals in their headers. The file you have specified or chosen would cause problems for your word-processor if it were submitted.

See also:

[Creating a Write Individual Letter](#)

### **Word Processor in Use.**

You are already using a copy of the word processor launched by this instance of ESP to edit a document. ESP will not launch another instance of a word processor until you have finished with the previous one.

N.B. Ami Pro 2.0 users. Sometimes, if you close down ALL the documents in an instance of Ami (2.0), it still seems to think it is editing your file when ESP interrogates it with DDE. You may notice it when you save your Ami document, return to ESP but don't get asked to make a history file entry. Usually you only notice it when you attempt to do some more word processing and ESP tells you, irritatingly, that you are already word processing. You can either quit Ami altogether or switch to Ami, start a new document (with File/New) and minimize Ami or switch to ESP. Surprise, surprise, Ami now gives the correct answer and ESP asks you to make a history file entry for the letter you finished editing five minutes ago. It seems there is nothing that we can do about this but if any Ami 2.0 DDE experts out there can think of a way, please let us know.

One way of switching to the word processor window is by holding down the control key and repeatedly pressing the tab key until the caption bar you require is displayed. At this point, releasing both keys will switch you to the required window.

See also:

[Multiple Databases](#)

**Creating a new List Template.**

You have selected an option which will allow you to create a new List Template File.

See also:

[Creating a New Write List Template](#)

[Customising List Templates](#)

## **Deleting List Template Files**

You have selected an option which will allow you to delete list template files.

See also:

[Deleting Write List Templates](#)

[Customising List Templates](#)

### **Editing List Template Files.**

You have selected an option which will allow you to edit list template files.

See also:

[Editing Write List Templates](#)

[Customising List Templates](#)

**Generating Lists and Reports.**

You have selected an option which will allow you to generate lists and reports.

Remember that the ESP list generator can take information from the history files.

See also:

List Generating with Write

**No merge fields in document.**

The AmiPro document has been scanned and there are no merge fields in it.

You insert merge fields into an AmiPro document with the menu command Edit/Insert/Merge Field. Unfortunately though, there is a bit of a chicken and egg situation. ESP can't make a data file until it knows which fields you want in it.

**No Individual Letters.**

No individual letters have been created for your current record.

See also:

[Creating a Write Individual Letter](#)



**Third Party Word-Processors**

AmiPro, Word and Word for Windows are only supported by the full versions of ESP.

If you wish to upgrade to the full version of ESP, contact your dealer or HIT Software. All the data in your database is accessible with the full versions of ESP.

**You have not specified name for new file.**

Regrettably, ESP cannot make up a file name for you in this situation. Using only eight characters you have to make up a meaningful, instantly recognizable file name for the new form letter you are about to create.

**No Record for WP.**

ESP is not allowing you to create an individual letter because you haven't selected any database records yet.

Each individual letter that you create is linked to one of your database records. When you create an individual letter, it is created for the current record. This allows ESP to manage several thousand individual letters.

At any time in the future, you can easily look up any individual letters you have sent to a particular contact. You will not have to scroll through thousands of file names whose significance you will almost certainly forgotten.

See also:

[Finding and Viewing Records](#)

[Selecting the Records you Need](#)

**No Records Selected.**

Mail-merging, label generation and list generation are carried out using a template file and a selection of records.

You will need to select the records you need before you can carry out the action you have requested.

See also:

[Finding and Viewing Records](#)

[Selecting the Records you Need](#)

### **WP File doesn't contain any refs to existent fields**

ESP was expecting to find at least one reference to one of your database fields in the template file that it was attempting to copy. This was not the case. Individual letter template files (sometimes known as style files) use the 'hat' character (^) followed immediately by the field name to refer to a database field.

See also:

[Creating a New Write Form Letter](#)

[Editing Write Form Letters](#)

[Creating a New Write Template](#)

[Editing Write Templates](#)

[Creating a New Write Label Sheet](#)

[Editing Write Label Sheets](#)

[Creating a New Write List Template](#)

[Editing Write List Templates](#)

## **WP File doesn't contain any Word mailmerge fields**

ESP was expecting to find at least one mailmerge field in the file that it was attempting to use. This was not the case.

Individual letter template files (sometimes known as style files) use the 'ampersand' character (&) followed immediately by the field name to refer to a database field.

Form letters, list templates and label sheets use standard Word mailmerge fields.

See also:

[Creating a New Word Form Letter](#)

[Editing Word Form Letters](#)

[Creating a New Word Template](#)

[Editing Word Templates](#)

[Creating a New Word Label Sheet](#)

[Editing Word Label Sheets](#)

[Creating a New Word List Template](#)

[Editing Word List Templates](#)

**Word-processor not supported.**

You have chosen a word-processor file of a type not supported by ESP.

AmiPro, Word, WordPerfect and Write are all targeted for the initial releases of ESP. It's possible that others will follow.

**Word-processor failed to execute.**

While ESP makes a fair check of any file it submits to your word-processor it cannot be as thorough as the word-processor itself.



**Too many records for merge.**

ESP restricts the number of records you can use in this type of merge to one thousand.

We don't consider this unreasonable; you would need at least two packets of paper to print it.

We recommend that you divide your selection into smaller sections and mail-merge each section separately.

**Creating a New Label Sheet.**

You have selected an option that will allow you to create a new Label Sheet.

See also:

[Creating a New Write Label Sheet](#)

[Label Generating with Write](#)

**Deleting a Label Sheet.**

You have selected an option that will allow you to delete label sheets.

See also:

[Deleting Write Label Sheets](#)

**Editing a Label Sheets.**

You have selected an option that will allow you to edit label sheets.

See also:

[Editing Write Label Sheets](#)

[Label Generating with Write](#)

**Label Generation.**

You have selected an option that will allow you to generate labels.

See also:

[Label Generating with Write](#)

**Creating a Individual Letter Template.**

You have selected an option that will allow you to create a new template for individual letters.

See also:

[Creating a New Write Template](#)

[Individual Letters with Write](#)

**Deleting Individual Letter Templates.**

You have selected an option that will allow you to delete templates for individual letters.

See also:

[Deleting Write Templates](#)

[Individual Letters with Write](#)

**Editing Individual Letter Templates.**

You have selected an option that will allow you to edit templates for individual letters.

See also:

[Editing Write Templates](#)

[Individual Letters with Write](#)



**File with given name already exists**

ESP is just looking after you here. You probably wanted to overwrite the file anyway but ESP is not taking the chance.

**Unsupported feature.**

This is an early release of ESP for users who have expressed a desire to obtain it before the official finish date. Certain features that we know are not thoroughly checked have been temporarily disabled.

## **No files to copy**

You have chosen a menu option which allows you to create a new form letter, a new list template, a new label sheet or a new template for individual letters.

We feel that the easiest way of doing this is to copy an existing one and allow you to make the changes you need. For this reason, ESP attempts to list the existing templates that it finds in your database. It seems that there are none for the word-processor that you have chosen. Either they have been deleted or none have been created yet.

Regrettably, this is a bit of an on-going chicken and egg situation. If you haven't created any yet you haven't got any to copy from. If you haven't got any to copy from it's going to be difficult to create new ones.

We recommend that you read the relevant chapter for your word-processor in the user guide and use one of the example databases supplied with ESP to familiarise yourself with the techniques involved.

See also:

[Creating a New Write Form Letter](#)

[Creating a New Write List Template](#)

[Creating a New Write Label Sheet](#)

[Creating a New Write Template](#)

## **Unrecognised WP file format**

ESP only recognises AmiPro, Word for Windows, Word Perfect and Write files.

If you answer yes, ESP will submit the file to your word-processor anyway. It may be able to cope.

See also:

[Using AmiPro with ESP](#)

[Using Word with ESP](#)

[Using WordPerfect with ESP](#)

[Using Write with ESP](#)

**Word for Windows not running.**

ESP insists that Word for Windows is already running if you are going to use it.

This saves you time in the end because, even on a very fast computer, Word takes several seconds to load and start.

Get into the habit of never quitting Word (use Close from the File Menu). Don't forget that you can minimise its window if you wish.

See also:

[Using Word with ESP](#)

**WordPerfect for Windows not running.**

ESP insists that WordPerfect is already running if you are going to use it.

This saves you time in the end because, even on a very fast computer, WordPerfect takes several seconds to load and start.

Get into the habit of never quitting WordPerfect (use Close from the File Menu). Don't forget that you can minimise its window if you wish.

See also:

[Using WordPerfect with ESP](#)

**AmiPro for Windows not running.**

ESP insists that AmiPro for Windows is already running if you are going to use it.

This saves you time in the end because, even on a very fast computer, Ami takes several seconds to load and start.

Get into the habit of never quitting Ami (use Close from the File Menu). Don't forget that you can minimise its window if you wish.

See also:

[Using AmiPro with ESP](#)

**OLE Server timeout**

Clicking the OK box might work if your word processor is just being slow.

Your word processor may be waiting for a response from you. The only way to tell is to switch to it and see. (The most reliable way of switching to other running applications is with Alt-TAB.)



**Chosen word processor not registered with system.**

The word processor you have chosen is not registered with your system.

**AmiPro Users.**

**Word Users.** This version of ESP has been designed to communicate with Word for Windows version 6.0. It will probably communicate with later releases of Word but it will not communicate with previous ones.

**WordPerfect Users.** This version of ESP has been designed to communicate with WordPerfect for Windows version 6.0. It will probably communicate with later releases of WordPerfect but it will not communicate with previous ones.

**No form letters in this database.**

You will have to create at least one if you want to carry out mail merges.

See also:

[Creating a New Write Form Letter](#)

**No templates for individual letters in this database.**

You will have to create at least one if you want to create individual letters.

See also:

[Creating a New Write Template](#)

[Creating a Write Individual Letter](#)

**No label sheets in this database.**

You will have to create at least one if you want to generate labels.

See also:

[Creating a New Write Label Sheet](#)

[Label Generating with Write](#)

**No list templates in this database.**

You will have to create at least one if you want to generate lists.

See also:

[Creating a New Write List Template](#)

[List Generating with Write](#)

**Two or More Instances of Word are Running.**

Given that Word allows the editing of several documents, we are surprised that MicroSoft allow more than one instance to be started.

ESP would be in trouble if it allowed you to proceed. It would not know which instance to send messages to.

You must exit one of the instances of Word.

**File has been encrypted.**

ESP needs to examine the file you have chosen. It cannot do so because the file is encrypted. If you really want to use this file you will need to provide a decrypted version of it.

**Bad Layout Sheet for Write Labels.**

When ESP examines a label layout sheet for use with 'Write', it needs to be satisfied that all the labels are, essentially, the same. The problem here is that one of the labels in the sheet has a different field name in one of its lines the the previous label had.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)



**Too many columns in label form letter.**

If you are using 'Write' to produce labels, ESP won't allow more than a maximum number of columns a sheet.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

**Too much data in sheet.**

If you are using 'Write' to produce labels, ESP loads all the field data it needs for a sheet of labels before generating it. There is a limit to the total size of the data it will load of sixty five thousand characters. This is normally adequate but if you have too many labels on a page and too many fields used in each label and the fields used are potentially large then you can hit the limit.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

**Too many items in label form letter line.**

If you are using 'Write' to produce labels, ESP won't allow more than a maximum number of fields on a single line of a label.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

**Unequal use of field names in label sheet.**

The ESP label generator was expecting the label template file to be constructed in such a way that each mentioned field is inserted the same number of times. This would normally be the case if every label is identical. You cannot use different label layouts on the same sheet.

This is only a limitation if you are using 'Write'. Label generation with third party word-processors may well be completely different and offer increased sophistication.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

**Too many lines in label form letter label.**

If you are using 'Write' to produce labels, ESP won't allow more than a maximum number of lines on a single label.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

**Unmatched lonely fields for Write Labels.**

When ESP examines a label layout sheet for use with 'Write', it determines whether field signals (e.g. &Address1) are the only characters on a line of a label. If this is the case then the corresponding line of all the other labels should also be 'lonely'.

This is all very tedious, but it does mean that ESP can cause your labels to be printed without blank lines where empty fields are encountered.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

**Odd Write File.**

It does this now and again and we can't cope with it. We can't see what the problem is and if we carry on and make what we think is a legal file, write will go to sleep on you. Try fiddling with the file until it works.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)

### **Too many rows in label form letter**

If you are using 'Write' to produce labels, ESP won't allow more than a maximum number of rows on the sheet.

See also:

[Label Generating with Write](#)

[Editing Write Label Sheets](#)



**Unacceptable entry for this type of field.**

**Date Fields** If the field is a date field, then what you have typed should be capable of being interpreted as a date. '20 12 96' is acceptable while '8 12 96' is ambiguous and will be rejected. Use '8 Jan 96' or '12 Aug 96'. 'Aug 12 96' and 'Jan 8 96' are also acceptable. Leaving the entry blank is also acceptable.

**Numeric Fields** If the field is a numeric field, then what you type must be capable of being interpreted as a number. Any extra characters will be ignored. Blank fields are also acceptable.

See also:

[Entering Data into a New Record](#)

[The Record Editor](#)

**WP Archive File is Corrupt.**

Before extracting the file you wish to view (or print or edit) from the archive, ESP performs some simple checks to make sure that it has not been interfered with by any 'foreign' processes. The file you have requested did not pass the tests. ESP is not prepared to pass the file onto the word-processor.

If you really need the file, you will have to see if you've got it in one of your backups.

**History file entry must have comment.**

When you create a new entry for a history file you must type some text into the comments box.

We take the view that an action date is useless without a comment.

See also:

[Adding a New History File Entry](#)

**Unacceptable User ID.**

ESP users are identified with three letters. You can use your initials or any other easily remembered combination.

Your user identification is used to mark data that you change and to load your own personal settings when ESP starts. It can also be used to control the scope of a synchromesh between two unconnected databases.

**File Create Failure**

The most common reason for a failure of this nature is a full disk. Please check.

Another possibility is that you do not have permission to write to the file or directory. Please check.

**Deduplication of Contact Records**

If you wish to upgrade to the full version of ESP, contact your dealer or HIT Software. The full version of ESP will access your existing databases created with the Lite version.

**File Confirm Delete**

Once the file is deleted it cannot be recovered. Only answer yes if you are sure that you can do without this file.

**Deleting your Current Selection of Records.**

If you wish to upgrade to the full version of ESP, contact your dealer or HIT Software. The full version of ESP will access your existing databases created with the Lite version.



**Automatic Dialling**

If you wish to upgrade to the full version of ESP, contact your dealer or HIT Software. The full version of ESP will access your existing databases created with the Lite version.

**Could not execute Word Processor.**

The most probable cause is that you haven't got it on your system. You will have to choose a word processor that you do have.

It is possible that you have the program but it can't be found. ESP expects the directory containing your word processor program to be mentioned in the PATH environment variable.

**Field Confirm Delete**

Are you sure you wish to delete this field. The data contained in the field will be lost. If the field is a pick list field, it's pick list file will also be deleted. Once deleted, the data cannot be recovered.

**Integrity Failure.**

The ESP database structure contains several built-in checks which are examined during routine operations.

If something suspect is found, you are asked to stop work and run the integrity checker from the Tools menu. This will examine you data and, if possible, rectify the problem.

**Could not Create Directory**

The system call to create a new directory has failed. The most likely reason is that a directory or file of the same name already exists. Other possible reasons are a full disk or no authority to access an area of a network.

**Not Enough Memory**

ESP makes quite small demands on the resources of your computer. You probably have another application running which is being greedy.

**Mouse-Only Activity.**

In this pre-release version, the only way of modifying a history file is by double-clicking on the entry required in the history window.

**Field not Selected.**

You have requested an operation to be carried out on one of the fields in your database but you have not chosen one. Choose the field you need from the list shown in the dialog box.



### **Cannot Run ESP Lite or Full from Network Drive**

The Lite version of ESP will only run if it is installed on a local drive of your computer.

N.B. The full version of ESP will run on network drives and access databases on network drives.

If you need to run ESP from a network drive then you will have to purchase the full version of ESP.

See also:

[Networking](#)

**Cannot run ESP Server from local drive.**

Redundant Help?????

The Server version of ESP will only run if it is installed on a network drive.

If you need to run ESP from a local drive then you will have to purchase the Full or Lite version of ESP.

See also:

[Networking](#)

**ESP Lite will not Access Remote Databases.**

The Lite version of ESP will not access Databases on Network or Remote drives.

If you wish to share a server database between several workstations you will have to purchase the appropriate number of full copies of ESP. A server version of ESP is also available.

See also:

[Networking](#)

**Record None Selected.**

In order to carry out the operation you have requested, you must have selected at least one record.

Records are selected using the Find, Filter, Exclude etc options in the Contacts menu.

See also:

[Finding and Viewing Records](#)

[Selecting the Records you Need](#)

**Function not Completed.**

This item is still being developed and will be included in the next release of ESP for Windows.

**Current Record not Grouped.**

The menu option you have just selected is designed to add all the other records in your current selection to the same group as the current record. Obviously ESP cannot do so if the current record does not belong to a group.

See also:

[Selection with Group Information](#)

**File Open Failure**

For some reason, a request to open a file has failed. Perhaps the file doesn't exist.  
Some files on a network require you to have special authority to access them.

## **Price List for 1994 (UK)**

ESP recommended retail price list in the UK for 1994. All prices are exclusive of V.A.T. and carriage.

### **ESP Lite**

ESP Lite £12.75

### **ESP Single-user**

ESP Single-user pack including single-user licence, diskette(s), and leather-bound, organiser style user guide. £165

### **Multi-user Licences**

Multi-user licences are available for companies and organisations.

Multi-user packs consist of a multi-user licence, diskette(s) for each workstation and one leather-bound, organiser style user guide. Extra user guides are available at £10.00.

Single-user packs and multi-user licences can be upgraded to permit an increased number of users. You can calculate the upgrade price by subtracting the current price of the licence you have from the current price of the licence you require.

2 workstations	£290
3 workstations	£415
5 workstations	£615
7 workstations	£775
10 workstations	£980
15 workstations	£1265
20 workstations	£1500
30 workstations	£1890
50 workstations	£2530
70 workstations	£3045
100 workstations	£3690
150 workstations	£4580
200 workstations	£5330
300 workstations	£6590
500 workstations	£8585
700 workstations	£10205
1000 workstations	£12250
1500 workstations	£15065
2000 workstations	£17440
3000 workstations	£21420
5000 workstations	£27730
7000 workstations	£32860
10000 workstations	£39330



**File Read Failure**

A request to read data from a file has failed. Probably the file is shorter than ESP was expecting. Possibly the file is corrupt.

**ESP Synchronesh with Lite Version**

ESP Synchronesh is only available in the full version of ESP.

If you wish to upgrade to the full version of ESP, contact your dealer or HIT Software. The full version of ESP will access your existing databases created with the Lite version.

**Telephone Support.**

Telephone support for the current version and release of ESP is available to registered users on 01703-454773 or ++-441703-454773 outside of the UK. Initial telephone support is free but HIT Software reserves the right to charge for ongoing support. Support will not be provided by fax or written correspondence.

When calling for support, you must be at your computer and have your ESP licence number ready.

**Faults**

We are always pleased to hear, in any way, about perceived faults you may find with the program. Please try to note the exact wording of any associated messages that appear on your screen and, if possible, be ready to describe the computer upon which the fault occurred.

Training and other chargeable support services are available through ourselves and the network of ESP retailers. For details contact HIT Software, PO Box 2, Farnborough, Hants, GU14 0NF, England. Tel 01252-522995 or ++-441252-522995 outside of the UK

**Multi-user Licences.**

If your licence is multi-user, telephone support will be provided thorough your computer system supervisor unless your company has made a special arrangement with HIT Software.

### **UK Dial Codes Database**

If you wish to upgrade to the full version of ESP, contact your dealer or HIT Software. The full version of ESP will access your existing databases created with the Lite version.

**File Write Failure**

A request to write data to a file has failed. The disk could be full. The file may have been marked as read-only. Please check.

## **Licence Violation**

Every workstation using ESP must have its own licence.

Licences to install and use ESP are issued by HIT Software. Each licence is identified with a unique number. Single-user licences and multi-user licences can be purchased from your dealer or from HIT Software. A single-user licence permits the installation and use of ESP on one workstation only. Multi-user licences are available for companies and organizations. These permit the installation and use of ESP on the agreed number of workstations.

The licence number for each workstation is entered when ESP is installed. If the licence is multi-user then the workstation number is also entered at the same time.

There is an option in the installation program (on your ESP diskette) to install a legal licence number without copying the software.

Single-user licences permit the use of one workstation only.

Multi-user licences permit the use of the agreed number of workstations. Each workstation must be identified with its own, unique number. The combination of the licence number and the workstation number permit the use of one workstation only.

ESP Version 6.0 Copyright (C) 1994 HIT Software, PO Box 2, Farnborough, Hants, England.

This software is protected by international treaty provisions and applicable national laws. Reproduction in any form, in whole or in part is expressly prohibited. Any infringement of copyright will be pursued to the full extent of the criminal and civil law. Interference with the software using compilers, de-compilers or any software tools is expressly prohibited. Renting or leasing of the software is prohibited. Transfer of the software on a permanent basis is allowed providing it is transferred with the licence, diskettes and documentation.

**Not enough free space on drive.**

The amount required is only an estimation.

If you wish, you can switch to another windows application now (e.g. with Alt-Tab). For example, if you were to switch to **Program Manager** and run **File Manager** you could free up the required space by deleting some unnecessary files.

Note that ESP is extremely conservative about estimating disk space needed and considers the 'worst-case' scenario whenever a decision has to be made.

**Shared temp files directory**

The person who looks after your network MUST deal with this problem. Many other applications will not detect it (with dire consequences).



**Record No Matching found.**

In order to carry out the operation you have requested, you must have selected at least one record.

Records are selected using the Find, Filter, Exclude etc options in the Contacts menu.

**N.B.** A common filtering mistake is to set your initials in the **Record Owner** control and search in vain for other users' records.

See also:

[Finding and Viewing Records](#)

[Selecting the Records you Need](#)

**File generated by FUTURE release of ESP.**

The file you are trying to work with was generated by a newer version of ESP than the one you are using now. Perhaps the file was copied from another system. Perhaps the file is on a network and another workstation is running the newer version of ESP.

N.B. Your ESP version 6 licence entitles you to use any release of ESP version 6. If you do not have the latest release, contact HIT Software.



