

C O R R E S P O N D E N C E

The Correspondence file integrates a word processor and a database to create a writing module unlike anything you're likely to have encountered before. The combination makes it a simple task to write a single letter, fax or email to one or several people at once. Unlike a stand alone word processor that stores each letter as a separate document, InView stores everything about a letter: when it was written, to whom and its content as a part of an inter-connected database set. As a result, you can search for and select all letters written to a certain contact or containing a particular text passage. *Tip g*

There are two ways to create correspondence. Compose an original, unique letter or summon up a form letter you created and stored in the Form Letters folder. Files stored in the Form Letters folder cannot be opened directly. They are in a special format, created and accessible only by the Correspondence file. If you open the Form Letters folder and try to open the letters, error dialogs tell you it can't be done. (See *Form Letters* later in this chapter.)

One of the nicest aspects of the Correspondence file it can use information from Contacts data and formulas to alter certain parts of a letter as necessary. These formulas are used by savvy folks like you to create smart letters that are capable of re-wording themselves based on the contact's information. This may be as simple as inserting the proper address into each letter or as sophisticated as altering entire passages based on specific information about the contact. (See the sections on the *Alternatives* window and *Merging Database Fields* for information about how data is interpreted to create individualized letters automatically.)

Tip: One of the most compelling reasons to use Correspondence for your letters, faxes and emails is that it keeps them ALL in one place.

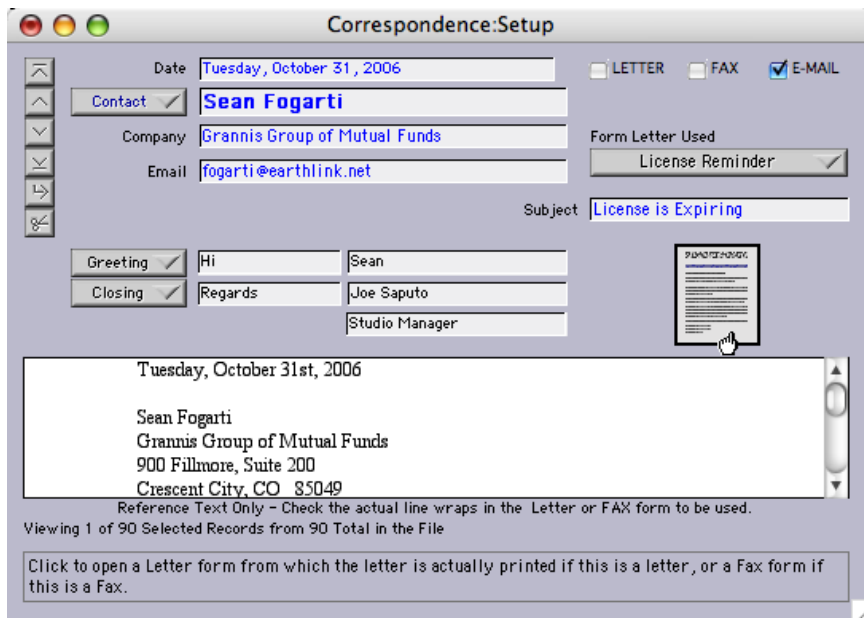
From Contacts you can use the Correspondence popup menu to Select in Correspondence for Contact to quickly view every written communication with that Contact.

C O R R E S P O N D E N C E S E T U P

Any correspondence consists of several parts: a date, an address, a greeting, a body and a closing. The Correspondence file uses a Setup window to establish who the correspondence is directed to and to select the parts being assembled for the correspondence. Although the Setup window can be used for writing new correspondence, it's format is intended for quick selection of these parts only. Other windows in the Correspondence file are more ideally suited for adjusting content, paragraph settings or style and printing. These windows are linked to the same record, that is, what you write in one window, is what you see in the others.

For simplicity, our reference to letters throughout this chapter applies to any type of correspondence whether it be a letter, fax or email unless otherwise specifically stated.

Letters start in the Setup window. This window holds all the information related to each letter and a word processor cell where letters are reviewed. Margins and indents shown in the Setup window are only approximated. Any one of the four letterhead windows or the two fax windows provides a precise display of how the very same letter is configured for printing. Letters are to be written and formatted in those windows, although each may have a different layout.



The Setup window has cells with information drawn from the Contacts file. You don't have to include all of this information in a letter. How much and what parts are used is up to you. You make provisions in the body of a letter to use data from the Setup window.



DATE

In the top left corner of the window is a cell for the Date. The current date is entered here automatically each time you start a new letter. You can change that date at any time. Date entry is extremely tolerant and works precisely as described in Entering Dates of the Date Keeper chapter.

CONTACT NAME AND COMPANY

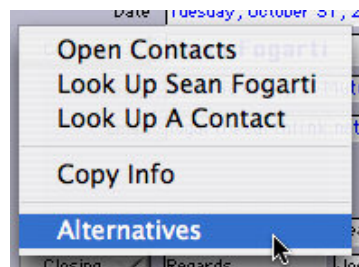
In the area below Date is the Contact name and Company.

Most often you write to someone in your Contacts file. While you are in the Contact Data Record, you can click on the Correspondence popup menu to open the Correspondence file and start a new letter, fax, or email with all of the contact's information: company name, address, salutation, title, business type, category, and value. Most of this contact information does not appear in the Setup window. Instead it is viewed in the Alternatives window or in the Data Sheet.

Note: The Correspondence file links to the Contacts file. Both Correspondence and Contacts files must be in the same folder, though, to make this connection.

CONTACT POPUP MENU

To the left of the Contact cell is a popup menu. The first item in the menu opens the Contacts file. If a contact's name is entered in the cell, the second item in the menu is Look Up Whatsiz Name. Whatsiz Name is changed to the actual name of the contact, and Look Up locates Whatsiz Name in the Contact's file. Next in this menu is Look Up A Contact. It activates the Contacts file and the Search dialog to locate a contact's record.



Copy Info assembles the contact's name, company, address and salutation on the clipboard. If you're faint about writing formulas or using form letters, choose Copy Info and then click in the word processor. Locate the cursor where you want this information and Paste. It's one way to easily set up a letter without using Formulas.

Last on the Contact popup menu is Alternatives, a window that displays more Contact information. The Alternatives window helps you write and test data merge formulas. More on that in the section on the Alternatives Window.

If you start a New Letter from the Correspondence file, enter the contact's name to draw information from the Contacts file. The name must be entered exactly as it appears in the Contacts file, otherwise the link between the Correspondence file and the Contacts file isn't established and the information you want from Contacts can't transfer.

Panorama's Clairvoyance helps you establish the link. With the Contacts file open in the background, the moment you type enough of a contact's name for Clairvoyance to recognize it, the rest of the contact name fills in. When you press the Tab or Enter key, the contact's information transfers exactly as if you started the letter using the Correspondence button in the Contacts file.

If the Contacts file is not already open, Clairvoyance doesn't help you enter a contact's name in the Correspondence, but, as soon as you close the cell with the Tab or Enter key, the Contacts file opens and InView tries to find a match in order to retrieve the contact's information. You must enter the contact name exactly as it is in the Contacts file or there is no match. A Rose is a Rose, not a Rowes.

Note: You can write to someone who is not in your Contacts file, a one shot letter. Type in the name of the person you are writing to, the address and salutation. Your letter can contain formulas to merge the name, address and salutation, or use the Copy Info function described above from the Contact popup menu.

At the left, the Setup window has arrows to navigate up and down through the "stack" of letters in the file. The arrows move to the first, previous, next and last letter, respectively. Beneath these arrows is an L-shaped arrow to add a new letter and a pair of scissors to delete a letter.

DIALING

Now you see it, now you don't. When the Contacts file is open, the Correspondence file has a link to dial the phone. When the link is made, the Phone icon shows below the Company name and is ready to dial the first of the contact's phone numbers. (See *Phone Dialing in the Contacts chapter if you don't know how to use this feature.*)

GREETING

Type a Greeting into the cell, or use the Greeting popup menu to choose from a list of all the greetings you used in previous letters. A new Greeting you type in is immediately added to the

popup menu. You can change the Greeting at any time to suit the tone of your letter; formal or friendly, personal or crisply business-like. When you change the Greeting, your new choice is used for subsequent letters until you change it again.

SALUTATION

Remember, when you first entered a Contacts record you put a Salutation in the Data Record? Immediately to the right of the Greeting is where that Salutation is used.

Closing

Enter a Closing in the cell, or use the Closing popup menu to choose from the list all the closings used in previous letters. Scroll down and release the mouse on the one you want to insert, like "Sincerely". As with the Greeting, the Closing in the cell remains for subsequent letters until you change it.

Author

To the immediate right of the Closing cell is the Author cell. It won't actually sign your name, but it does print your name below the space for your handwritten signature. You can enter your entire name, your first name only, a nickname, whatever suits the tone of a particular letter. As always, the choice you make remains in place for subsequent letters until you revise it. *Tip g*

TITLE

Below the Author is another cell for your Title. Include your title for business correspondence. Omit it for informal letters. The title here remains for subsequent letters unless you revise or remove it.

Tip: For the perfect finish, Paste in your digitized signature. See how to in the Creating Letters section.

LETTER TYPE

Across the top right of the Setup window are three checkboxes to indicate the type of letter you're creating. It's important to set the type because it tells Correspondence what to do when you choose Letter/Fax Form in the Windows menu or Print in the File menu.



LETTER

If you are writing a letter, click the Letter checkbox. This tells the Correspondence file to use a Letterhead form to compose and print. Choose Letter/Fax Form, Cmd/Ctrl-L, from the Windows menu or click on the letter icon to open Letterhead 1 automatically.

FAX

If the letter is actually a fax, click in the checkbox labeled Fax. InView locates a fax number in the Contact's Data Record to display it below the checkbox. The first number in the contact's record that has Fax in its Memo cell is the number used. When you are ready to write or print the fax, Correspondence opens a Fax form.

EMAIL

If the letter is actually an email message, click in the Email checkbox. InView uses the Email address in the Contact's Data Record. If the contact has more than one Email address, the first one listed is used. Time to test your recall. Remember the Email Addresses button in Contacts has a rotate address order option. Now you see the point.

(See Sending Email in the section on the File Menu later in this chapter.)

FORM LETTER USED

A New letter uses the form letter DEFAULT to start each letter. A new Fax uses FAX DEFAULT. You can quickly override the default as desired.

The Correspondence uses Form Letters to store letter styles as well as content or wording for frequently used letters and faxes. The Form Letter Used popup menu displays the name of the Form Letter being used for the current letter and it lists form letters available for use. Choose one and it opens into the Correspondence file. Use it as-is or modify it to fit you needs.

Note: Choose Form Letter in the Functions menu opens a window where you can peruse the contents of the Form Letters before you make a choice. The Form Letters window is also excellent for permanent on-the-fly changes to existing Form Letters.

ADD FORMATTING

Add Formatting, the last item in the listing of available Form Letters, adds Formula Merges to the beginning (date, name, address, and salutation) and the end (closing, author and title) of the displayed letter. *(See the Form Letters section.)*



LETTER BUTTON

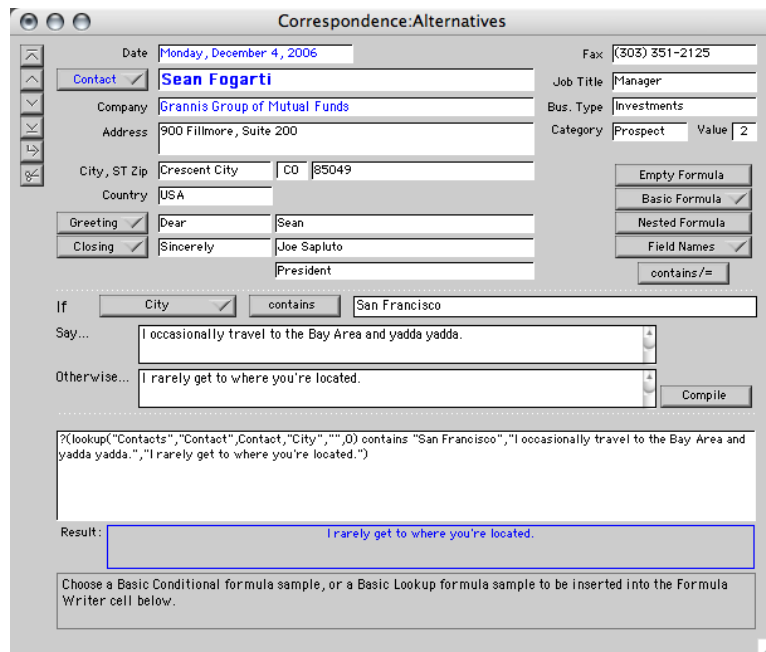
The Letter icon is a button that takes you to a window where you write or edit the body of the letter. The form it goes to depends on your radio button settings for Letter, Fax or Email at the top of the window.



ALTERNATIVES WINDOW

Not all of a contact's information transferred to Correspondence is shown in the Setup window. Some of the information from the Contact Data Record are sent to the Alternatives window.

To open the Alternatives window, click on the Contact popup menu in the Setup window and select Alternatives or choose Alternatives from the Windows menu.



The top left of the Alternatives window holds the same Date, Contact and Company fields as in the Setup window. The Contact popup menu is the same as in the Setup window, except that it offers to return you to the Setup window.

Below the Company is the contact's full address as it is entered in the Contacts Data Record. That is followed by the Greeting and Closing fields as they appear in the Setup window.

In the upper right are five cells of data from the contact's record: Fax#, Job Title, Business Type, Category and Value.

You can have this information print as a part of a letter, but with the exception of the Fax #, it's more likely to be used to control how some parts of the letter are worded. This is commonly referred to as mail merge or formula merge and is most often used when creating letters in quantity. (See the section on Merging Database Fields.)

FAX #

If the contact's record has a Fax # it is copied into this cell.

JOB TITLE

If there is a Job Title entered in the Contacts record, it goes into this cell. It can be used in the address or in a formula merge to write different things to people with different Job Titles.

BUSINESS TYPE

This is the Business Type entered in the Contacts file. As with Job Title, your letter can determine what to say in certain passages based on the Contact's Business Type.

CATEGORY

Like Business Type, the Contacts's Category can be utilized to determine the wording to be used in parts of your letter, in this case, based upon the Contact's category.

VALUE

You may want a single sentence or an entire paragraph worded differently according to a Contact's Value. You may have something entirely different to say to Prospects with different Values.

FORMULA BUTTONS

On the right side of the Alternatives window is an array of buttons. These buttons automatically generate formulas that link with any of the data in the Alternatives window. Their functions are described at the end of this chapter in the section on Formula Writing.

FORMULA WRITER

Together, the Formula buttons, the Formula Writer (the large cell stretching across the bottom of the window) and the Result, which display below the Formula Writer, make building merge formulas less complicated. Results of formulas entered in the Formula Writer cell are displayed in Results area. Often the Result is an error message meaning the formula needs a correction. *(See the section at the end of this chapter on Formula Writing for more information on using these tools.)*

CREATING LETTERS

The Correspondence file generates form letters or unique letters. Unique letters can be converted to form letters and form letters can be revised to be unique. Any letter can be generated to any single Contact on a case by case basis as needed, or it can be directed to any number of selected Contacts all at once.

You may want to use a form letter or re-use a previous letter you wrote. You may want to write something brand new. They all end up in the same place eventually.

To create any kind of new letter, choose New Letter... or Same Letter... from the Functions menu or use the Add New Record tool in the tool palette. You can start in the Contacts file, too. Locate the person you're writing to and choose Correspondence in the Transfer menu or click on the Correspondence popup menu in the Contacts record.

SETUP WINDOW

No matter how you start, new letters always begin in the Setup window. In most cases, the Setup window is pretty much filled in for you. If you start a new letter in the Correspondence file the cursor goes to the name cell and blinks, waiting for you to enter a contact's name. After the name is entered, the rest fills in automatically, assuming the name matches a name in the Contacts file.

If you write a letter to someone not in your Contacts file, you must type in the person's complete name, address and a salutation. You look puzzled. You're wondering just where you're supposed to enter the address. There's no place to put them! The rest of the contact information is in the Alternatives window. Choose Alternatives from either the Windows menu or Contact popup menu.

Note: When you print a letter to All Selected Contacts in the File menu, leave the Contact name blank. InView fills that in as each of the letters is created. *(See Print to Selected Contacts in the section on the File menu.)*

Check through the cells to be sure everything is the way you want it. Are the Greeting, Closing, Author and Title right? Be sure the radio buttons at the top of the window are properly set for Letter, Fax or Email. Typically, this beginning process takes well under a minute and you're ready to put the body together.

The large cell of the Setup window, the letter's body, contains the combined result of all of these cells, plus the words and formatting of the letter so far. If you used Same Letter New Contact in the Functions menu, your letter carries over that wording, otherwise it is using the DEFAULT letter or DEFAULT FAX format.

You can now modify the words and formatting as you wish, or switch to a prepared Form Letter by choosing one from the Form Letter Used popup menu. Your selection from the menu swaps the words and formatting to the letter of your choice without changing what you've already established in the other cells of the Setup window.

Now's the time to go to another window to work with the letter in a format that better represents the final result. Click on the Letter icon to switch to a letterhead or fax layout depending on the Letter, Fax or Email setting at the top of the Setup window. You can also get there by choosing Letter/Fax Form in the Windows menu. Or go to the Windows menu, down to Forms and select your preferred letterhead or fax form.



LETTER AND FAX FORMS

Letters are not printed or faxed from the Setup, Alternatives or Form Letters windows. As its name implies, its purpose is to collect and assemble the parts. A set of four Letterhead forms and two Fax forms exist for editing letter content and format.

Letter/Fax Form in the Windows menu and the Letter icon on the Setup window open forms based on the settings of the Letter, Fax and Email radio buttons. To choose a specific form for editing, choose any one from the Forms sub-menu located in the Windows menu. (See *Graphics Mode in Printing & Editing Reports for more information on customizing your letters and faxes.*)

Each Letterhead and Fax form contains a large Word Processor cell where the letter content (words) and format (font, points, style, paragraph, margin and tab settings) are all controlled.

WRITING & PRINTING A LETTER

Once you arrive at the Letterhead or Fax window, click the Word Processor cell to activate it, or use Cmd/Ctrl-J, then click to create an insertion point or beginning spot for your typing to take place. The tools and techniques here are typical word processor tools. Highlight or select what you want changed, then choose a font, point size, or type style from the Text menu. (See the *Text Menu section later in this chapter for important information on using these features.*)

Note: The Ruler and scroll bar that are sometimes displayed inside the letterhead and fax windows do not print.

FORMULAS

Whoa! What's all this stuff? *s Tip*

All you did was click the Word Processor cell. Your contact turned into a box of gibberish. These are formulas, simple to medium in complexity, but very odd if you've never seen them before. Formulas, or text with the Formula Merge Style, displays surrounded by a box. The simplest of these is something like «Contact», the formula that tells Correspondence where to insert the contact's name. The address moves up the complexity ladder to Formulas that determine how much space an address requires. Formulas also format the date and go on to calculate and show just about anything that can be derived from the contact's data. Formulas must be precisely, carefully, perfectly correctly written or you get nada.

We wanted to save the secrets of Formula recipes for later, but there's no holding back. If you really want to know how to write a formula now, the section on the Text menu has it all.

The Alternatives window, accessed through the Windows menu or the Contact popup menu, is a terrific environment to safely and harmlessly explore and create Formulas.

SIGNATURES AND PICTURES

Include your digitized signature or other graphics in the letter. Use Paste. Yes, it's true. You can Paste graphics anywhere you want them in the Word Processor cell. *s Tip*

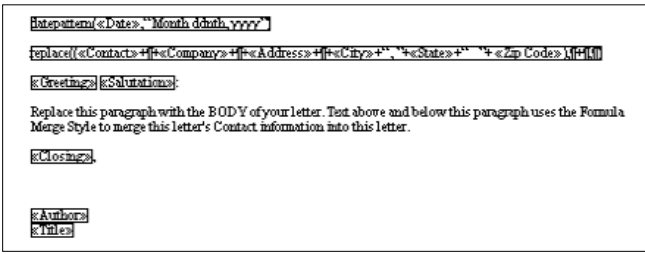
For the ultimate in Form Letters, Paste in your signature and Save the Form Letter (Save as Form Letter). Every time you use the letter, the signature appears automatically. As the content of your letter shrinks or grows, the signature moves right along in it's proper position.

SPELL CHECKING

The Spell Checker for the word processor works exactly as it does in all the InView & StockView files. With the word processor cell active, click to insert the cursor at the point from which you want spell checking to start then type Cmd/Ctrl-I to scan for errors. If one is found, the scanning stops and the suspect word is highlighted. On Macintosh, press the Option and Control keys and click and hold on the highlighted word. On Windows, press Alt and Right click and hold on the highlighted word. A menu listing suggested spellings pops up on the spot. When you choose from this menu the highlighted word is replaced with your choice. Type Cmd/Ctrl-I again to resume scanning.

To check a single word that you're unsure of, double-click on the word to highlight it. Use Opt/Alt and Cntl/RClk to click and hold on the word so the menu of suggested words appears. Make your selection.

Note: The Spelling Dictionary is not user editable.



Tip: Scared by formulas?
Clear everything from the word processor cell, use the Text menu to be sure the Text Style is set on Plain Text and just type in whatever you wish.
Set fonts, size and style as you would in any ordinary word processor.
Copy Info in the Contact popup menu of the Setup window can even grab the whole name and address for you to paste into your letter, all without any formulas.

Tip: A desktop fax machine can serve as a scanner if you also have a fax/modem. The resolution may prove better than you expect. Use the desktop fax machine to send documents, such as a sheet with your logo and signature, to your fax/modem, then use the fax software to save the fax as a graphic file. Edit, enhance and modify the image in a graphics or photo retouching program. Keep the file size below 100K for best results. The finished graphic can be pasted into your reports and letters or named Logo and saved in the folder with your other HindSight files for access by EZ Graphics.

PREVIEW AND PRINT

When you're satisfied with a letter, select Preview in the File menu. You see your letter complete with name, address, date and text, just as it will print. A Preview reassures you all is done correctly. Click on the Next Page tool in the window's tool palette to see any additional pages.

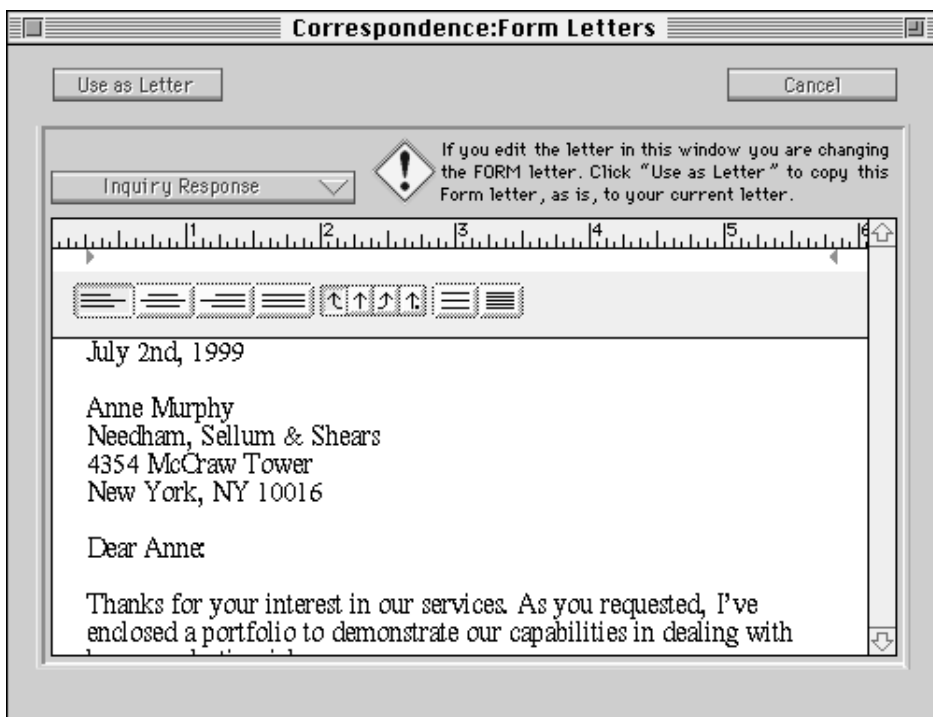
Each form handles text overflow adding pages automatically as the letter is printed.

Done, almost. You composed and printed a letter or a fax or email, and filed a copy of it. You want to print an envelope for the letter? InView does that and just about everything but check your grammar and lick the stamp!

FORM LETTERS

To use a Form Letter click on the Form Letter Used popup menu, located above the Letter icon on the Setup window, and choose one. If you want to edit the body of the letter, click on the Letter icon.

To review the Form Letter content before using it, go to the Form Letters window via Choose Form Letter in the Functions menu. This window lets you examine an existing Form Letter and use it if it suits your needs.



Choosing Form Letter, in the Functions Menu, takes you to the Form Letters window. In this window you are able to directly access and edit every Form Letter stored in the Form Letters folder.

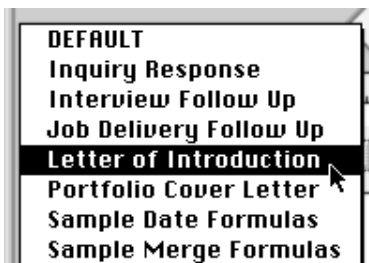
FORM LETTER WORD PROCESSOR CELL

The main item in the Form Letters window is a Word Processor cell. If you click in the Word Processing cell any changes are automatically Saved and the original, as it was, no longer exists. Be sure you mean to do this.

When the Word Processing cell is open you have one new menu, the Text menu. To change the font, size, style, paragraph margin settings or color of any text, first select the text (highlight it) then make a choice from the Text menu. (See the Text Menu section later in this chapter.)

FORM LETTERS POPUP

This popup menu, located to the left of the Exclamation point warning, bears the name of the Form Letter displayed in the Word Processor cell. Choose a form letter and the button name changes to the name of the selected form letter and the contents of that form letter appear. *Warning! g Tip*



SAMPLE FORM LETTERS

InView ships with some sample Form Letters installed.

Warning!
Changes to a Form Letter in the Form Letters window are PERMANENT. Make changes in this window only when you mean to permanently change the contents of that form letter.

Tip:
To add new form letters to the Form Letters Used Popup, choose Save As Form Letter from the File menu, give the Form Letter your own name then click Ok. Now make your changes, which are are permanent to your new form letter. (See the section on Creating New Form Letters.)



These are starting points to build from. Among them is a Sample Formulas form letter. You won't send this letter to anyone. It is a sort of scrapbook full of merge equations and comments that you Copy and Paste in your real letters or use it as a learning tool. With time and experience, you may find it useful to Paste and store your own formulas in this formula scrapbook.

ADD FORMATTING

Sometimes you may have the body of a letter with no formulas for the name, address and such. Maybe you brought it in from some other program or you just plain wrote the letter here, straight and simple. Add Formatting sandwiches the letter with all the basic formulas that are typically used at the beginning and at the end of a letter saving you the hassle of figuring out how to do it. *s Tip*

Tip:

Use Add Formatting to recover from a botched job of editing formulas. Delete all the formula text from your letter to strip it to just the letter's body text.

Now use Add Formatting and you have the basic set up to work from again.

USE AS LETTER

After locating the Form Letter you want to use, click the Use As Letter button to start correspondence to the contact shown in the Setup window.

Use As Letter is much more than a look change or the addition of words. It completely replaces everything in the current letter except the contact information in the Setup window. If you decide, mid-flight in writing a letter, to activate Use As Letter, you completely erase the work you have done so far. There is a warning that the form letter is about to replace your current letter. Hold the Opt/Alt key if you want to avoid the warning.

CANCEL

This button takes you back to the Setup window without choosing the Form Letter in the Form Letters window.

WHAT IS A FORM LETTER?

In a nutshell, a form letter is a complete letter or any part of a letter that exists ahead of time and is ready to use repeatedly, at a moments notice. A form letter may be as simple as a saved format with your margins and fonts established with nary a word in sight. Some folks call these templates.

Correspondence uses Form Letters to store letter styles as well as the wording for frequently used letters, faxes or email. When you have a letter format established with the desired fonts and margins use Save As Form Letter, in the File menu if you want to establish this particular letter as a template and add it to the Form Letter Used popup button.

A more complete form letter has lots of words for a particular situation. This sort of Form Letter can serve as a cover letter for job deliveries, a letter of introduction, a follow-up letter after an interview, a Thank You letter or a description of your services and qualifications. It can have merge formulas to fit a particular situation. When the need arises, select the appropriate Form Letter, make major, minor or no modifications, and print. *s Tip*

THE DEFAULT FORM LETTER

The DEFAULT form letter shipped in Correspondence has merge fields and formulas in place for the date, address, closing, etc. It's body is a simply paragraph instructing you to replace it with your own. Highlight and delete the default paragraph then fill in the blank.

Every time you create a new letter, the Correspondence file opens to the DEFAULT form letter that is stored with the other form letters. By setting the DEFAULT form letter font, margins and layout beforehand, you are ready to start a new letter with minimal fuss. Everything, except the content, is ready to go.

Modify the DEFAULT form letter in the Form Letters window or in any of the letterhead or fax windows. In the Form Letters window if you have DEFAULT selected in the popup menu, any changes are automatically saved. In the letterhead or fax windows the DEFAULT form letter is not altered until you choose Save As Form Letter from the File menu. Same goes for the FAX DEFAULT form letter that each new Fax starts with.

While there's only one DEFAULT form letter, you can save revised versions under other names and use those as needed. *s Tip*

CREATING NEW FORM LETTERS

To convert a letter you've written in one of the letterhead or fax windows to a form letter, choose Save As Form Letter in the File menu. Name the new form letter and it's done.

Creating a new form letter from scratch is another story. Start with a new entry in Correspondence, Cmd/Ctrl-E, so you don't mess up a real letter. This is a temporary letter for construction purposes. Address it to anyone just to have some data to work with.

You don't have to start with the DEFAULT as your starting point for the new Form Letter. Click the Form Letter Used popup to choose a different Form Letter to start with. Click on the Letter, Fax or

Tip:

Form Letters store letter styles as well as the wording for frequently used letters and faxes. When you have a letter format established with the desired fonts and margins use Save As Form Letter, in the File menu to save the configuration. Whenever you retrieve the form letter, the font and format are also retrieved.

The Form Letter named DEFAULT is the one used automatically whenever you start a new letter. Save a DEFAULT form letter with your preferred font and margins to be sure each new letter will start with your preferred arrangement.

Tip:

If you prefer to start with an empty letter every time, delete all but one word of the DEFAULT form letter. Choose Save As Form Letter from the File Menu to save and replace the old DEFAULT form letter with your new changed one.

Email buttons to set the type of use intended for this form letter and choose Letter/Fax Form in the Windows menu to open a window in which you can write the letter and adjust the format.

When you're satisfied that your form letter is completed choose Save As Form Letter in the File menu and give it a name.

To create another form letter, there's no need to make yet another new entry to Correspondence. Just revise the one you're in. When you're finished creating new form letters, use the scissors tool in the Setup window to delete the temporary letter you added to create the form letters.

RENAME FORM LETTERS

To rename a Form Letter, hold the Shift key and click the Form Letters popup menu. Select the Form Letter you want to rename. A dialog box opens. Enter the new name, click OK. Some things in Life are so easy.

DELETE FORM LETTERS

To delete a Form Letter, hold the Cntl/RClk key and click on the Form Letters popup menu. Select the one you want to delete. A dialog box asks you to confirm the deletion. Click on Delete and it's electronically vaporized.

A Form Letter can also be removed, recycled, or trashed, from you're computer's desktop. Open the Form Letters folder found inside your InView folder. Simply click the form letter to be trashed and drag it to the Trash, or Right Click and choose Delete on Windows.

MENUS

FILE

Most of the items in the File menu are familiar standards. There are a few notable exceptions.

SAVE AS TEXT

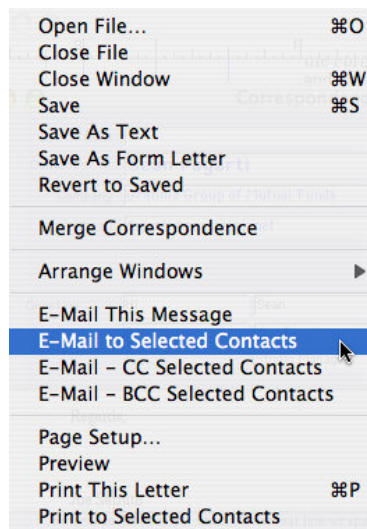
Save as Text creates a text file for use in other applications or to send as an email attachment.

When you choose Save As Text, InView asks you to name the file select the place to save it.

SAVE AS FORM LETTER

In a Letterhead or a Fax window, you can name and save the current letter contents as a new Form Letter. Simply type in a new name in the naming dialog that appears. The new Form letter is added to your list of Form Letters. If you're just wanting to change the existing Form Letter, don't type in a new name and the existing Form Letter will be permanently changed.

Any letter you name DEFAULT becomes the form that new correspondence latches on to automatically. (*See The Default Form Letter earlier in this chapter.*)



MERGE CORRESPONDENCE

Merge Correspondence allows you to update one copy of your Correspondence file with another. This is ideal for laptop users who have a desktop computer. It's swift and easy to do.

PERFORM A FILE MERGE

The two files you want merged, the Correspondence file performing the merge and updating, and the Correspondence file that has information you want to merge can be in the same folder, on the same disk or connected via network or modem. Both must be the same version number Correspondence files. You knew that.

RECIPIENT FILE

Begin to Merge Correspondence from the file you want updated, the Recipient file. Choose Merge Correspondence from the File menu.

A dialog box appears asking you to enter a starting date. All Correspondence created up to and including that date is included in the merge. Older Correspondence is not merged. If you merged Correspondence files previously, enter the date of that merge or an earlier date. It's OK if there's some overlap between merge dates and when in doubt, use a very old date. The default is 30 days previous to the current date.



SOURCE FILE

This done, another dialog opens directing you to Select and Open the Correspondence file to be merged with the Recipient file, the Source file.

Now the merge is underway. Silently and with no further ado InView compares the two files and updates the Recipient with those letters that are new or modified. If all goes properly, InView advises you of the completed job. Click OK and Save.

InView offers to replace the Source file with the updated Correspondence file. Click OK if you want to replace it, otherwise it's up to you to copy and transfer the new, updated Correspondence file to your second computer or to your backup disks.

You are doing regular backups, aren't you?

Note:

On Macintosh OS X, see the important setup instructions, Email Configuration, at the end of this chapter.

Warning!

Before sending quantities of email be sure your message is right. Otherwise you may be embarrassed or even offensive. Make it a habit to send a single copy to yourself before sending in bulk to give you a chance to not only proof read the result, but also to check what it looks like at the other end of the process.

Note:

Correspondence does not support sending attachments at this time. It is limited to plain text email which can include links.

On OS X with XMail installed, HTML styled email can be generated, making it possible to include images from a web site.

See XMail installation at the end of this chapter.

SENDING EMAIL

EMAIL THIS MESSAGE

This choice sends the current letter as an email message to the Contact it has been addressed to.

EMAIL TO SELECTED CONTACTS

After confirming your intention, the current letter is duplicated and processed for every Contact currently selected in the Contacts file whether it is one or one thousand.

Any formulas in the letter are processed individually so that each email can have personalized touches. *s Warning!*

A Mailings notation is offered when the emails have all been processed.

Note: No check is made as to whether or not the Contact has a valid email address. An email is queued for each selected Contact regardless.

EMAIL - CC SELECTED CONTACTS

EMAIL - BCC SELECTED CONTACTS

CC and BCC gather the email addresses of all the Contacts currently selected in Contacts. Any that lack an email address are simply omitted.

CC addresses are placed in the CC (carbon copy) line of the outgoing email so that each receives a copy. In this case each can also see who else is included in the mailing.

BCC places the email addresses in the BCC (blind carbon copy) line of the outgoing email. This is a much more private mass-emailing since no recipient can see the who else received a copy.

Note: Many SPAM filters block emails sent to large groups of people, especially when BCC is used.

Correspondence uses your email address in the To for CC and BCC sending.

PRINT THIS LETTER

This prints the letter currently on your screen. *s Tip*

PRINT TO SELECTED CONTACTS

This prints the current letter, the one displayed on the screen, to all the contacts you have Selected in the Contacts file as you choose this option. If you have one contact selected, you get one letter. If you have a hundred contacts selected, you get 100 letters. Obviously, you need to first Select the Contacts you want to receive the letter. This print command opens a dialog box telling you the number of contacts chosen and asks for an OK to proceed.

Note: To print a letter to a number of contacts, leave the Name, Address and Salutation cells in the Setup window empty. As InView works through the list of selected contacts, this information is installed.

If you have limited computer memory, InView cannot handle large numbers of letters in one print command. Because the Correspondence file stores a letter for every Contact selected in the Contacts file, a large number of selected contacts devours memory.

For mass mailings, Select smaller sets of contacts, print their letters, archive or delete them and do another set.

In either of the above printing scenarios, after printing is completed, a dialog box appears asking if you want to add a note about this letter to the contact's record.

Ah hah! Here's a place to use that Events & Notes part of the Contacts file. If the answer is OK,

you do want a note about this letter or fax, enter a comment in the dialog box. It can be much longer than the dialog box shows as you type. Then click OK. The note is date stamped with the current date and added to the Mailings cell of the Contact's Events & Notes window. This current note is placed in front of any other notes in the cell. If the answer is No, you don't want a note added, click Cancel in the dialog box. *Warning! g*

SEARCH

The Search menu in the Correspondence file lets you locate, select or change data in any of the fields or cells of the Correspondence file. The choices in this menu are typical Panorama search tools described fully in this manual's Getting Started chapter.

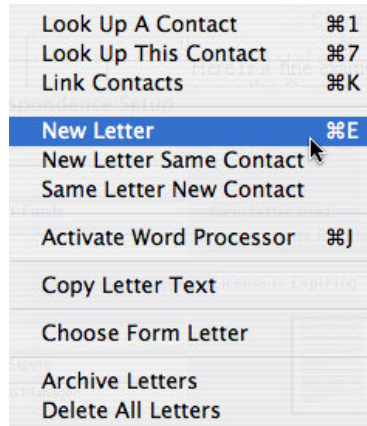
FUNCTIONS

LOOK UP A CONTACT

Good old Cmd/Ctrl-I. You see it with Look Up A Contact just about everywhere in InView. It opens the Contacts file and opens the Search dialog ready for you to type in someone's name.

LOOK UP THIS CONTACT

Here is a fine example of HindSight's making things as easy as possible. Look Up This Contact opens the Contacts file and locates the record of the contact displayed in the current record of Correspondence. But wait, there's more! The Correspondence popup on the Contacts>Data Record window contains an option to Select Past Correspondence. Boom! You're right back in Correspondence with "this contact's" past correspondence selected available for you to view.



If no contact's name is in Correspondence, the Search dialog box opens and you enter a name.

LINK CONTACTS

Link Contacts opens the Contacts file and places it behind the letter to make the Contacts file information accessible. In order for the Correspondence file to locate address and salutation info for the contact you are writing to, the Contacts file must be open.

NEW LETTER

This creates a new, empty letter using the DEFAULT form letter. Now you can see why it's so convenient to make sure the DEFAULT form letter is formatted the way you want it. (*See The Default Form Letter and Save As Form Letter.*)

Type in a Contact name. Assuming the name is also in your Contacts file, the rest of the information automatically transfers in for you.

NEW LETTER SAME CONTACT

This creates a new letter using the same Contact information as shown in the Setup window.

SAME LETTER NEW CONTACT

From time to time, you may find it easier to use the Search menu to locate a contact's letter. Once found, Same Letter New Contact, copies the letter currently in the Word Processing cell to a new letter that has no contact information. Type in the new contact name (let Clairvoyance help you) and the rest transfers from the Contact Data Record.

ACTIVATE WORD PROCESSOR

To activate the Word Processor cell you can click inside it or type Cmd/Ctrl-J.

Note: Once the Word Processor cell is open a Select All (Cmd/Ctrl-A) highlights all the content of the letter. If you use Select All when the Word Processor cell is closed, all letters in the Correspondence file are selected.

COPY LETTER TEXT

Although you can copy everything inside the Word Processor cell, you also get the formulas as formulas. Copy Letter Text processes the formulas and places the resulting letter on the clipboard. You can then paste it into any other place or software that you care to.

CHOOSE FORM LETTER

This opens the Form Letter window to choose a pre-existing Form Letter as the body or starting point of a letter. In this Form Letters window and the Setup window, the Use as Letter button

Warning!

You cannot produce and send modem faxes en masse since each fax requires a trip to the fax software phone directory. If you try to use Print (Fax) To Selected Contacts, each and every contact on the fax list winds up with the full set of faxes. Faxing 25 selected contacts means each contact gets 25 faxes. Not cool! Group faxes are best sent digitally by choosing Print (Fax) This Letter to create a single fax to your group of contacts and then use the fax/modem software group features to send one fax to everyone.



transfers the chosen Form letter to the Word Processing cell and replaces the current letter. The Form Letters window however is great when setting up or modifying your form letters. The Form Letters window is excellent for permanent, on-the-fly changes to existing Form Letters.

ARCHIVE LETTERS

We've said it once. We've said it twice. Now we even have a really easy way to back up your data.

This menu choice saves all the letters in the Correspondence file. It creates a date stamped duplicate of your Correspondence file, an archive, and saves it in the folder. That done, it asks you to confirm that it's now OK to delete these archived letters from the original, working copy of the Correspondence file. When you archive your letters, the result is a leaner, faster Correspondence file. You have a permanent record of your past correspondence stored in the dated archive and named something like Correspondence to 12-1-00.

To review archived letters open the date stamped Correspondence file. Since it's an exact duplicate, it operates exactly as the Correspondence file does.

Note: If you choose to store the archived letters elsewhere, include a copy of HS Resources and Flow Chart so this isolated copy of Correspondence can find menus to use. To do this, on Macintosh, hold the Option key as you drag the files to the backup disk or folder. This copies it rather than moving it. On Windows, Right click as you drag the files to the backup disk or folder, then choose Copy Here in the menu that pops up at the destination.

Don't Archive Letters every time you write one or on a daily, weekly or monthly basis. When should you Archive Letters? Unless you've done some mass mailings it needn't be done very often; maybe once or twice a year. The file can hold thousands of letters without getting sluggish. And therein lies your first clue. When the file seems to be trudging rather than dancing, Archive Letters.

DELETE ALL LETTERS

OK. So every word you write isn't a pearl. Some things you don't need to keep. Delete Letters clears, without storing, all letters in the Correspondence file when you choose this from the menu. It makes more memory available and speeds the Correspondence file. It's not that we don't trust you, but InView always asks you to confirm your decision before deleting all the letters. Click OK to purge the letters. If you should have a change of heart after deleting all letters, you can retrieve all the deleted letters if you have not yet used the Save command. Quick, use Revert To Saved in the File menu or close the file and don't Save. If you did Save, the letters are gone, kaput. But then of course, you do have your backup copies to refer to if necessary.

COMPANY INFO

These is the EZ Graphics menu of Correspondence. Its function is described in detail in the Printing & Editing Reports chapter of this manual. Company Info only available while one of the Letterhead or Fax forms is open.

The Correspondence file ships with Company Information turned off. To use it, choose All Company Info or any of the individual elements in the Company Info menu. Then choose On in the same menu.

MARGINS

Th Margins menu is only available while one of the Letterhead or Fax forms is open. Margins controls the size of the top and bottom margins of the pages. Left and right margins are set using the word processor's Ruler and Text menus. See the page 5-13 for adjusting indents on the ruler.

When setting either the Top or Bottom margins you're presented with two dialogs. These dialogs allow you to create different margin sizes for the first page and any additional pages.

The first dialog shows the current setting, in inches, on the first page. Change it to the size you want for the indicated margin on the first page of any letters or faxes printed from the window. A second dialog opens showing the current setting for additional pages. Enter the size you want for the selected margin on the second and all subsequent pages.

Note:
The Windows menu in all past versions and documentation has been re-named Access.

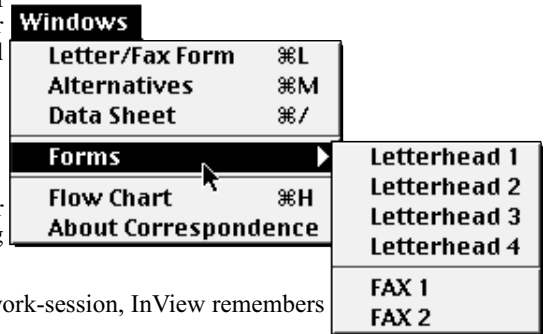
A new Window menu now lists all open windows providing a quick access, by selecting any one of them.

WINDOWS

LETTERHEAD/FAX FORM

This opens a Letterhead or Fax form for printing your letter or fax or for making graphic design changes.

Note: If you've had a form open during the work-session, InView remembers



until you Quit. This re-opens that same form, unless you've changed the Letter, Fax or Email status in the Setup window. If you've had no forms open during the work-session, it opens a letterhead or fax form as indicated in the upper right of the Setup window.

SETUP

In any Correspondence window, this takes you back to the Setup window.

ALTERNATIVES

Available only in the Setup window, this moves you to the Alternatives window that holds additional Contact fields and the Formula Writer to write and test merge formulas. (See the earlier section on the Alternatives window and the section on Merge Formulas at the end of the chapter.)

DATA SHEET

The Data Sheet is integral to all HindSight software files. In the Correspondence file Data Sheet is where you see all of the letters currently in your Correspondence file. They are listed one after another. You can sort and search, delete and much, much more. At the bottom of the Data Sheet is a counter indicating how many of the letters in the file are presently selected from the total in the file. Chances are you'll have little reason to work in the Correspondence Data Sheet, but it's nice to know it's there. *Expert Users' Tip g*

PREVIOUS FORM AND NEXT FORM

These choices are only available in one of the Letterhead or Fax form windows and move backward or forward through the six forms.

HIDE/SHOW RULER

This choice is only available in one of the Letterhead or Fax forms and hides or shows the Word Processing data cell ruler. The ruler does not print when you choose Print This Letter from the File menu, even if it shows on-screen.

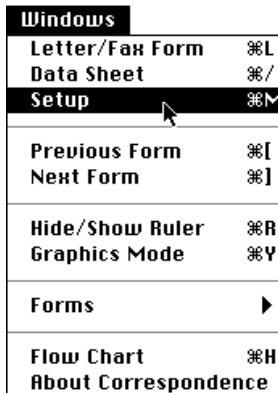
GRAPHICS MODE

This menu choice is available only in a Letterhead or Fax form and is used to modify information outside of the Word Processing cell. (For detailed information about using Graphics Mode, see the chapter on Printing and Editing Reports.)

FORMS

This submenu lists the forms in the Correspondence file. It lets you switch to any of the four Letterhead forms or two Fax forms. You edit, print and preview your letter in these windows.

The indents, tabs, left and right margins, and fonts you set for a letter carry over to all the forms when you view or print that letter. Top and Bottom margins and letterheads are another story. You can have a different letterhead or top margin for each of the four Letterhead forms and the two fax forms.

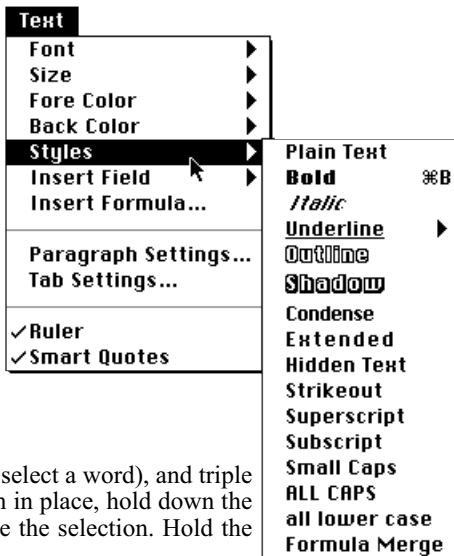


Expert Users' Tip:
In the Data Sheet only, hold the Shift key as you select About Correspondence to access the full Panorama Search, Sort and Math menus along with the Data Sheet menus.

TEXT

When the Word Processor cell is active the Text menu appears in the menu bar. This menu has options for formatting text and controlling the word processor. Any choice from the Text menu affect the highlighted, or selected text of the letter; be it a single word, a paragraph, or the entire letter.

At the top of the Text menu are five submenus: Font, Size, Back Color, Fore Color, and Style. To change the appearance of selected text, choose the options you want from these submenus. The submenus also show the attributes of selected text. If the text is all the same, a checkmark appears next to the font, size, or style. If the text has mixed attributes, a dash appears next to each font, size or style used in the selected text.



SELECTING TEXT

Select text by clicking, dragging, double-clicking (to select a word), and triple clicking (to select a line). You can also set the I-beam in place, hold down the Shift key and use the arrow keys to extend or reduce the selection. Hold the



Tip:

The Text menu only affects the highlighted or selected text. Select as much or as little text as you want to change, then use the Text menu to choose the font, size, color or style to be applied to the selected text.

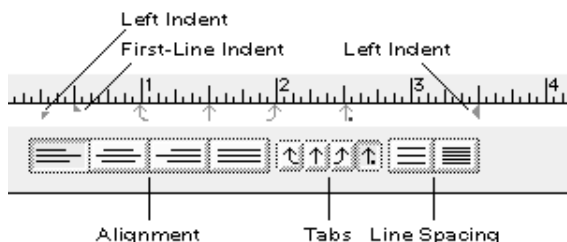
Shift and Opt/Alt keys and use the arrow keys to select one additional word at a time. To make non-contiguous selections, hold the Shift and Cmd/Ctrl keys as you drag or double click each selection. With multiple, non-contiguous selections made, you can change the appearance of all at once using the font, size, style, and color submenus. *s Tip*

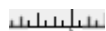

To select a rectangular area, hold the Cntl/RClk key as you drag across the area you want to select. This is especially handy for selecting one or more columns in a table. Once the columns are selected, change the appearance with the font, size, style, and color submenus.

THE RULER

The ruler has controls for the width of paragraphs (margins), tabs, alignment, and leading (line spacing). To display or hide the ruler, use the Ruler command in the Text menu. It's the same as Hide/Show Ruler, Cmd/Ctrl-R, in the Windows menu.

Changes you make to the ruler apply to entire paragraphs. If you want to change multiple paragraphs, select at least one character in each of the paragraphs you want to change and then adjust the ruler.

**INDENTS**

Each paragraph has three indents available: first-line indent, left indent and right indent.  The first-line indent controls the distance from the left extreme of the ruler to the beginning of the first line in the paragraph. Drag the first line indent marker, the top half  of the left triangle, to adjust the first-line indent.

The left indent marker controls the distance from the left extreme of the ruler to the beginning of the all the rest of the lines in the paragraph. Drag the left indent marker, the bottom half of the left triangle, to adjust the left indent. The right indent controls the distance from the right extreme of the ruler to the end of the each line in the paragraph. Drag the right indent marker, the right triangle, to adjust the right indent.

Note: You can set the indents numerically using the Paragraph Settings dialog. Open this dialog from the Text Menu, or double-click on the shaded portion of the ruler. In the boxes designated for each of the three indents, enter numeric values representing the actual inches for each indent and press OK.

LEFT AND RIGHT MARGINS

There are no separate margin controls. The Left and Right margins are established with the indents, above. You can highlight text, such as a paragraph or the entire content of a letter, and choose Paragraph Setting from the Text menu to get the desired results.

TABS

The Word Processor has four kinds of Tabs: left, center, right, and decimal. There are four buttons in the ruler to indicate the tab you want. To position a new Tab, first click the kind of Tab you want, then click on the bottom part of the ruler at the position where you want the Tab. To move a Tab, drag it to a new position. To delete a Tab, drag it above or below and out of the Tab area.

For precise Tab adjustments use the Tab Settings dialog. This is also the only way you can change an existing Tab from one kind to another, say from a left Tab to a decimal Tab. If you open the dialog by choosing Tab Settings... from the Text menu, revisions apply to the last Tab you adjusted. Cmd/Ctrl-click on the Tab you want to adjust to open the dialog. This dialog lets you set the precise position of a Tab, the kind of Tab and the Tab leader.

The Tab leader is a character that automatically repeats along the distance to a Tab. The Tab leader guides the eye across the page. Common Tab leaders include periods, dashes, and asterisks.

ALIGNMENT

Paragraph alignment can be flush left, centered, flush right, or justified. To set the alignment, click one of the alignment buttons in the ruler or use the Paragraph Settings dialog.

LINE SPACING

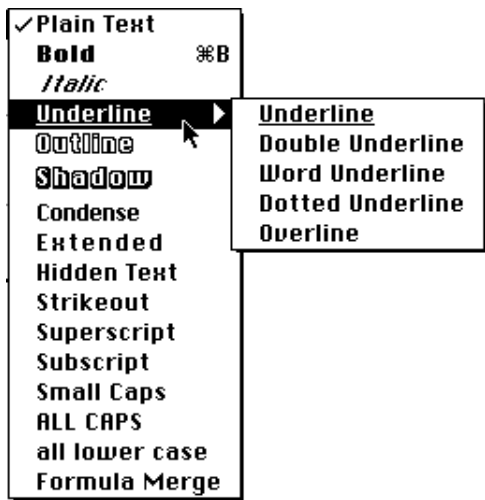
The space between lines is called leading. The Word Processor uses the default setting, single space, however, you can adjust this to double space or be more highly refined than that, if you wish.

To increase leading, press the Increase Line Space button. To decrease leading, press the Decrease Line Space button or use the Leading setting in the Paragraph Settings dialog. The Leading setting

specifies additional space between lines. For example, to add 6 extra points between each line, set the leading value to 6.

TYPE STYLES

The Word Processor cell supports twenty different type styles. Most of these are self explanatory, but a few unusual ones require some additional explanation. Underline can be modified four ways: Double Underline, Word Underline, Dotted Underline, and Overline (a line above text). Combine these in various ways to produce 16 different effects. For example: Double Word Dotted Underline.



Condensed and Extended change tracking of characters, the letter spacing along the line. The letters do not change size or shape. Condensed tracks letters closer together. Extended spreads them apart.

The Hidden Text creates text that appears only as you edit a document. When the document is displayed on-screen or printed, Hidden text hides. To show Hidden text, click anywhere in the Word Processor cell. Text with the Hidden attribute has a dotted line through it when it is displayed. *Tip g*

Strikeout draws a line through the middle of text. Small Caps draws lower case letters as miniature upper case. All Caps makes every letter upper case even if you type it in lower case. Because this is a type style, the text is not changed. If you cancel All Caps later, the text appears in upper and lower case. All Lower Case makes all text lower case no matter how it was typed. Again, the type style can be removed and the words return to the way they were typed.

The final type style option, Formula Merge, is described below.

Tip: If you want the entire line of Hidden text to disappear without leaving a gaping blank line in your letter, make certain there is an End of Paragraph marker (¶), the carriage return) at the end of the line and that it, too, has the Hidden text attribute.

“Imagination is more important than knowledge”
Albert Einstein

WRITING FORMULAS

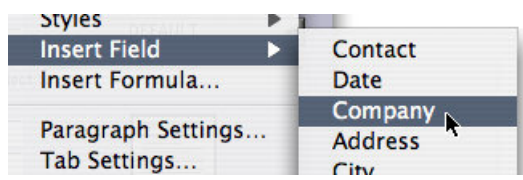
With a little imagination you can use formulas to create a multitude of personalized letters at one time.

Formulas can be simple instructions to insert an unaltered piece of contact data in a letter, such as the name of the city. Other formulas can perform complex tasks, such as, evaluate a contact’s Category and, based upon the contact’s Category, insert one of many optional passages.

As shipped, Correspondence includes several samples of formulas in the Form Letters folder. You can Copy and Paste these formulas, as-is, in your letters or modify and use them. These samples are listed in the Form Letters popup menu in the Form Letters window. *Tip g*

MERGE FIELDS

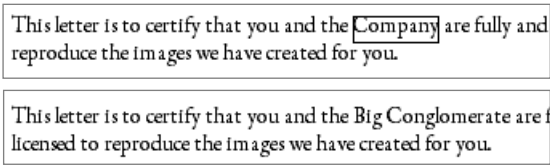
Merge Fields are properly formatted field names in a letter. In editing mode, each field name has a box around it. When you print or view a letter with Merge Fields, the information called for by field name is inserted. A Merge Field can do as little as drop the name and address of a contact into a letter wherever you want it, or can create letters tailored to each person in a mass mailing. We’ve all gotten Publisher’s Clearinghouse “personalized” mailings. It’s like that.



To merge data from a field into a letter requires that field names be set in the Formula style. Type in the field name and apply the formula style or have Correspondence do it for you in one easy step using Insert Field in the Text menu.

A field name that is more than one word or includes punctuation marks must be enclosed in left and right chevrons, « ». There’s no harm done if you use chevrons to enclose a single word field names, but they aren’t necessary. Type the chevrons using Opt/Alt-\ and Shift-Opt/Alt-\.

To insert any field listed in the Setup or



Tip: Formulas in the word processors are treated as a type style. Just as you make selected text bold or italic, you select text and apply the formula style, but style alone does not make a formula. Some substance is also required. When the word processor is active, text in the formula style appears with a box around it.



Alternatives windows into a document, choose the field name from the Insert Field submenu in the Text menu. The field name appears with a box around it. When the document is displayed on-screen or printed, the box disappears and the data in the field is merged into the document.

Note: Five additional fields are listed in the Insert Field menu. Letter Type, Letter Used, Counter, ID and Body are fields used by InView to manage the Correspondence file. Choosing them for merging into your letter does no harm, but probably makes no sense either.

Merge Formulas

Without a doubt, the learning curve gets steep here. If you're a light duty computer user, you can go on to the next chapter. Formula writing takes a bit of time and effort to master, but the potential is enormous. For instance, in a mass mailing, include a formula to evaluate the business type and value of each contact and print entirely different words to every combination.

We're going to start with an overview of using formulas. Don't get overwhelmed. Under Formula Writer you're going to see that there are some terrific tools here to help you.

To insert a formula into a letter, use the Insert Formula command in the Text menu. A dialog box appears allowing you to enter a formula. Type the formula in the dialog. Use the Fields and Functions menus to help you enter the formula, then press OK. The formula appears in the document with a box around it. When the document is displayed or printed, the box disappears and the result of the formula is merged into the document. The formula may use any field or function available their respective menus, including lookups to grab data from other databases.

CONDITIONAL FORMULAS

A conditional formula is a True or False question. Conditional formulas say, "If the condition is such, do this, otherwise do that," except it's not in plain English. It's an equation. The formula is more like "? (condition = such, this, that)." That question mark replaces the word If. The first part of the equation says what is to be considered. The first comma can be thought of as the word "then". Following the first comma is the instruction for what to do if the condition is True. The second comma can be thought of as "otherwise" and is followed by the instructions for what to do if the condition is not true, aka False.

You look bewildered. Okay, suppose you have 100 contacts selected to receive a letter. Some work for manufacturers, some work for retail businesses and are marked as such in the Business Type field of Contacts. You want to tell the manufacturers that you're great with capabilities brochures and you want to tell the retailers about your catalogue skills. The rest of the letter is the same to both. You need to insert a Business Type specific section in each letter.

The equation reads something like:

? («Business Type» = "retail", "You know those great little specialty catalogues filling your mailbox? Well, we did them!", "Last year we produced capability brochures for 372 of the Fortune 500 companies!")

And this is what happens:

IF the Business Type equals "retail," the condition is True and the letter prints the first option enclosed in quotation marks. Everyone else is not retail, the condition "retail" is False, so they get the second option. Observe the word "retail." No caps. Oops, that means contacts you selected who have "Retail" Business Types were missed as were "retailers" or any other variation that isn't exactly "retail." There is a curable though. Change the = to contains and every Business Type that has "retail" anywhere within it rings true.

So what happens when you have three or more business types? Conditional formulas can be nested. Yes, you read it right. ?(A = B,C,?(A = D,E,F)) Or you can add more qualifications that need to be fulfilled. ?(A = B and A = D,C,F) These can be blended and rearranged to do just about any kind of comparison.

Throughout formulas we use punctuation, symbols and markers. As mentioned in the section on Field Merge, a field name consisting of more than one word needs to be enclosed in left and right chevrons, « ». Quotation marks mean to consider or use the text inside the quotation marks verbatim. These "" mean literally, insert nothing. Numeric values, like the Value field contents, have no quotes. "2" means insert the text character for two. 2 means the numeric value of two. These symbols, > is greater than, < is less than, = equal to, ≠ not equal to. We also use contains, notcontains, beginswith and endswith.

Decipher this and you're a power user:

? (Category = "Prospect" and Value < 3 and «Zip Code» beginswith "06" or Category = "Prospect" and Value = 1, "We sure want to work for you..."; ?(Category = "Client" and Value = 1, "We love doing business with you..."; "If at first you don't succeed, you're running about average."))

LOOKUP FORMULAS

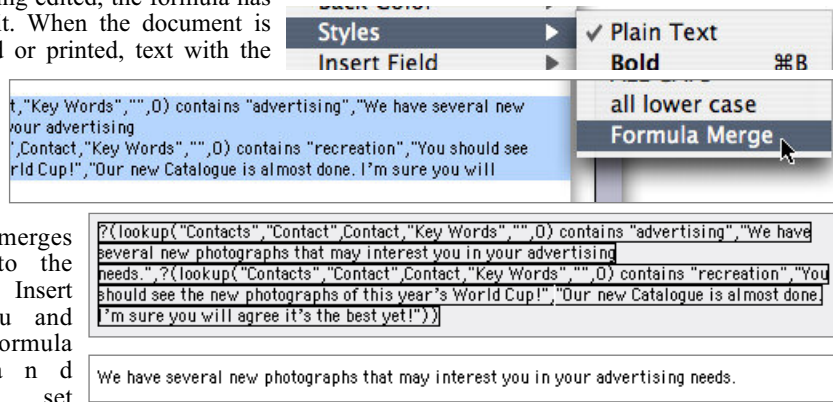
The conditional formulas above are all written to work with fields and data in the Correspondence file. That's great most of the time, but sometimes you may want to use information that's still back in the Contacts file. To get that data you need, use a lookup formula.

Fortunately since we're always after the Contact data, there are very few variations to worry about here. Lookup("Contacts","Contact",Contact,"Field Name Here","",0) works on grabbing just about everything you'd want from Contacts. Just change the Field Name Here to the actual field name in Contacts from which you want to pull data. No chevrons, «», this time. Just the perfectly entered field name between the quotes. Uppercase, lower case, spelling and spacing must all be exactly right or it won't work.

The Contacts file must be open and a Contact name installed in the current record of the Correspondence file. When Correspondence matches the Contact name in both files, the data from the field you entered is retrieved. You don't need to alter the rest of this formula, so believe us when we say don't worry about it. Don't touch it, you'll break it.

FORMULA MERGE STYLE

When a field or formula is merged into the document, the merge is accomplished using Formula Merge, found in the Style submenu of the Text menu. In fact, to the software's way of thinking, these formulas in a box are nothing more than another style, just like bold or italic. When the document is being edited, the formula has a box around it. When the document is being displayed or printed, text with the formula style is treated as a formula. The word processor calculates the formula and merges the result into the document. The Insert Field submenu and Insert Formula command automatically set Formula Merge for you, but you can manually set Formula Merge for any section of text. Of course if the text is not a valid formula, an error message is displayed when the document is displayed or printed.



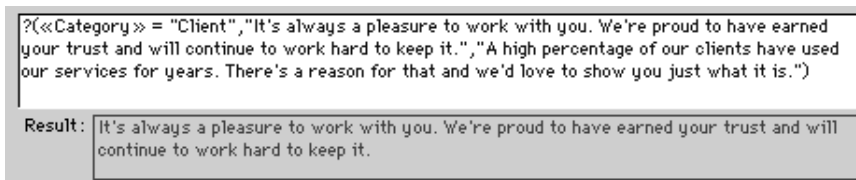
Formula Merge can be combined with any other font, size, and style. For example, you can create a formula that prints or displays in 18 point Univers Bold Italic Underline, while another formula in the same document can be 12 point Helvetica Black Shadow. *Warning! g*

Warning!
Do not mix type styles in a Formula Merge block. No bold on some parts of a formula and underline on another part of the same formula. This results in a formula error.

FORMULA WRITER

The Alternatives window has tools for generating formulas and for testing them.

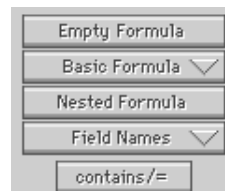
At the bottom of the Alternatives window is a large text editing cell we call the Formula Writer. When you enter Field names, formulas and combinations in the Formula Writer, the results are immediately displayed in the Result box below it. Type Formulas directly into the cell or use the



buttons on the right side of the window to build them.

The buttons add their particular kind of formula to whatever is already in the cell. If you have something highlighted in the cell, it is replaced by the button's formula or field.

Start simple and see what happens. If your formula does not compute, one of a number of possible error messages appears below the cell. If your formula works, the results are shown.



EMPTY FORMULA

When you click on the Empty Formula button it adds =(Condition,True,False) to the Formula Writer cell. You replace all the words with your formula.

BASIC FORMULA

When you click on the Basic Formula popup menu it lists Conditional and Look Up. Choose Conditional and it adds =(Category = "Client","Words to clients","Words to everyone else") to the Formula Writer cell. You modify this starting point to your current needs. If you choose Look Up it adds lookup("Contacts","Contact",Contact,"Key Words",",",0) to the Formula Writer cell. You replace Key Words with the name of the field from which you want to grab data.

NESTED FORMULA

Nested Formula adds =(Category = "Client","Words to clients",=(Category = "Prospect","Words to Prospects","Words to everyone else")) to the Formula Writer cell. This is a more complex formula for you to rework as necessary.

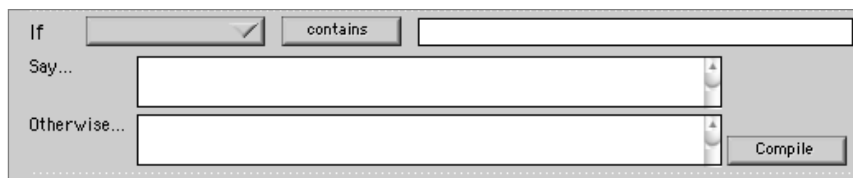
FIELD NAMES

The Field Names popup menu lists the fields in the Correspondence file available for formulas. When you choose one it replaces any highlighted text in the Formula Writer cell. If nothing is highlighted, the field name is added to the cell's contents.

If you hold the Opt/Alt key, the menu lists the fields in Contacts. This is handy for replacing Key Words in the look up formula.

CONTAINS/=

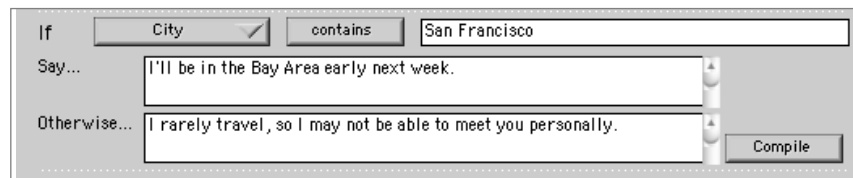
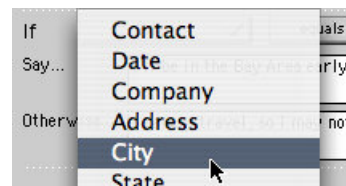
When you click on the Contains/= button it changes every occurrence of contains to = or vice versa. This is useful for adjusting the tolerance of your formula. Use it on some simple conditional formulas and watch the results.



AUTOMATED FORMULAS

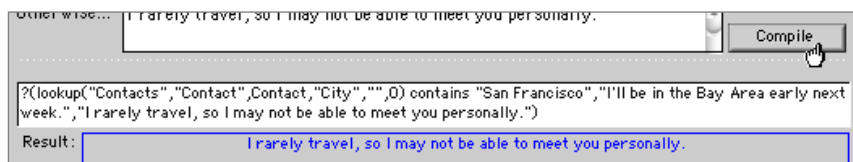
Better still, the center of the Alternatives window contains an easy to use set of buttons and cells to create the most common combinations of these various formulas

The popup menu lists fields in the Contacts file. Choose the one to be used for determining the result of your formula.



To the right, enter what it is within that field that the formula should be looking for, such as the name of a City, a Job Title, Key Word or the Business Type.

In the first of the two larger cells, write the words you want used if the condition is met.

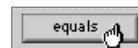


Below that, write the words to be used if the condition is not met. It can be nothing.

Click on the Compile button and your formula is instantly entered in the Results.

Note that the results key on whatever Contact is entered above. Change the name a time or two to see the various results.

As illustrated below, inserting the cursor into any existing formula, then clicking on the Compile button, allows you to insert additional formulas within - nesting them.



Use the center button to indicate if it's to be a precise match - Equals - or if it simply needs to Contain whatever you've entered.

Play with it. You won't break it. And it's really the only way to learn it.

When you have an equation you like and want to use in a letter, select it and copy it. Open the Setup window or any one of the letterhead or fax forms. Paste the formula into position. Now select the formula so that it's precisely highlighted and go to the Text menu. Choose Formula Merge from the bottom of the Style submenu. The selected text is surrounded by a rectangle indicating its formula status.



EMAIL CONFIGURATION

SET PREFERENCES

In Correspondence, make sure you're in the Setup Window. Go to the Access menu and choose Email Settings.

The information to be entered here is the very same information you had to have entered into your regular email software in order to send email.

Start with your name as you want people to see it in the From. It can be left blank if desired.

Next is your email address. This is the address that your email is going to be From and the one that Replies will go to.

Enter your User Name. This is the name assigned by your ISP to access your email account.

Enter your Password. This too is assigned by your ISP for your email account.

Enter the SMTP Server, the mail server, that handles your OUTGOING email.

Note: If you're unfamiliar with these settings, check the settings in your dedicated email software or contact your ISP. HindSight has no capability to determine this information for you.

Finally, enter the email address to be used in the TO field when email is sent to groups, using CC or BCC. This address also gets an automatic BCC of every email sent by Correspondence to provide you with a verification of what was sent. If left empty, the account's email address, above, is used.

Only if required by your ISP, set the appropriate method of Authentication and the Port.

Authentication is used by ISPs to prevent spammers from using their system to send email. If you don't know what form of authentication to use, ask your ISP or start with None, send yourself an email, and progress through the choices until it works.

Most ISP's use Port 25 for processing email on their servers. If yours uses the alternate port 587, change it here, but otherwise leave it on 25. If your ISP requires some other port, choose Other and enter the port number.

TEST SETTINGS

When you think you have everything set right, click on the Test button. If you get no error messages, you might have everything set right. Just because it was able to be shoved out onto the internet doesn't mean your settings are all right. Watch your incoming email for the test message. If after a reasonable amount of time, nothing has appeared, recheck your settings and try again.

ERRORS

To avoid embarrassing errors, when creating an email, especially one that is going to numerous recipients, send a copy to yourself first to be sure it's what you intended.

When sending email, Correspondence creates a dated Email Results log in the folder. This shows each and every email processed and what resulted. You can open and review this log in any text editor.

Email errors can be somewhat cryptic since every email server can have its own unique responses in addition to the various messages the OS may choose to use. A -52 Socket Error, for instance, means the server is not responding, but so does a TCP/IP Error -3162.

If an error message appears when sending or if errors are noted in the log, choose a key portion of it and use that for a web search. That's how we too determine what many of them mean.

Note:

If you enter your Incoming email settings, you will meet with failure.

Be sure you enter your outgoing SMTP settings.