

## My basic request & small change requests

### Basic concern

"Central" for the administration and preparation of the data according to the needs of the users and the respective situation should be the "smart list" in each program module. For this purpose, it must be possible to transfer the templates of the "User-defined views" into the "Intelligent lists" of the respective program module.

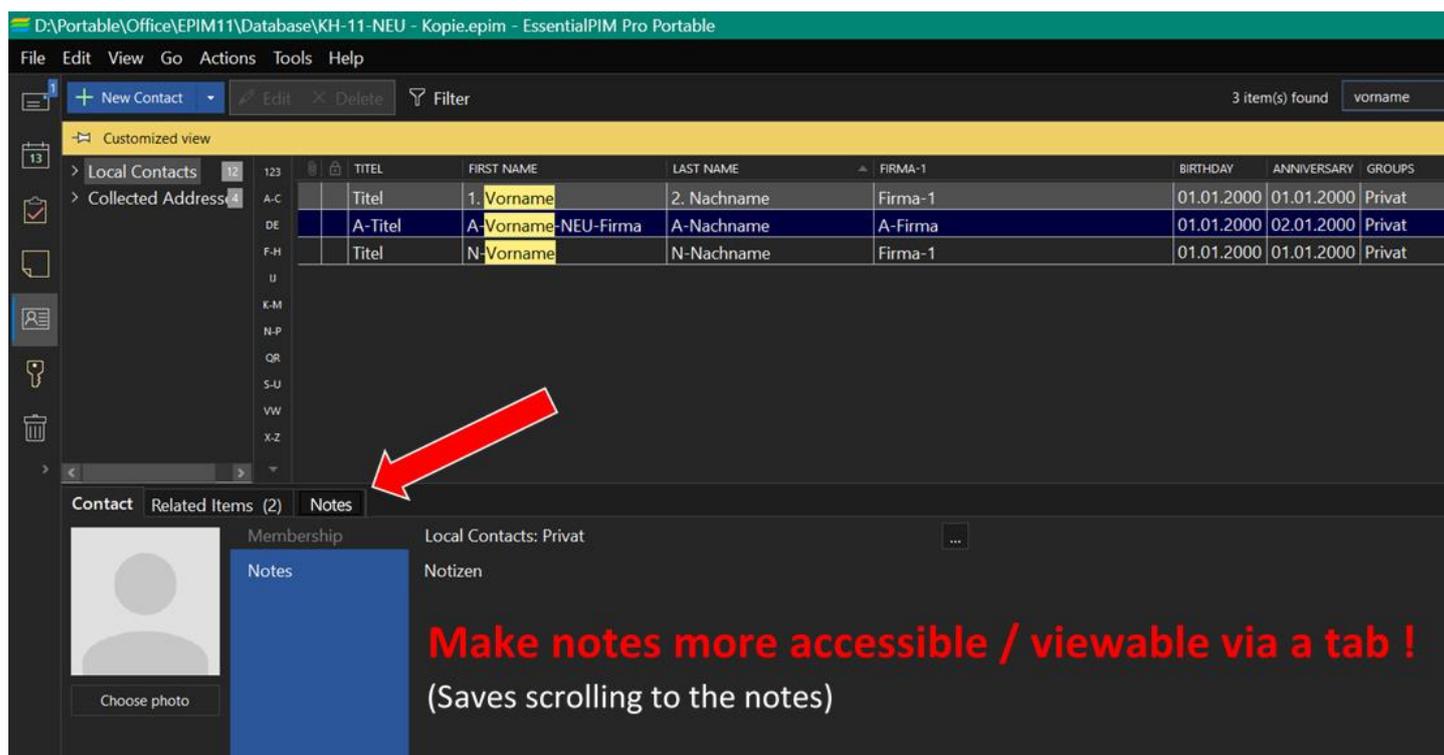
The current options for filtering, sorting and grouping data in the individual modules would then no longer be necessary, especially since these functions are sometimes very confusingly distributed over the entire program interface.

The "Advanced Search" would then only be required for a search with multiple conditions across all modules and multiple fields to locate unrelated data. In any case, a preview for the results would have to be available in the "Advanced Search" so that not every result has to be opened for checking.

**Below you will find three suggestions for the e-mail, appointments and notes modules and some small requests. The suggestions are only briefly presented and it is clear to me that implementation will probably take years.**

**But perhaps it will still arouse your interest - I hope so !**

- Appointments outside working hours are not displayed when "Show only working hours" is selected in the options. If there are appointments outside working hours, these should be displayed or at least a clear, clearly visible note should appear in the calendar that there are appointments before or after working hours
- The sender should be queried before the email is created or not entered. This way it cannot happen that an email is sent via the wrong account and the user can select the desired account.
- For FollowUp tasks, the text "FollowUp" should be omitted, because the task is already marked by the flag and can be filtered through it.
- Contact Management



The screenshot shows the EssentialPIM Pro Portable software interface. The main window displays a contact list with columns for TITEL, FIRST NAME, LAST NAME, FIRMA-1, BIRTHDAY, ANNIVERSARY, and GROUPS. A red arrow points to the 'Notes' tab in the bottom right corner of the interface. The text 'Make notes more accessible / viewable via a tab ! (Saves scrolling to the notes)' is overlaid in red and white text.

TITEL	FIRST NAME	LAST NAME	FIRMA-1	BIRTHDAY	ANNIVERSARY	GROUPS
Titel	1. Vorname	2. Nachname	Firma-1	01.01.2000	01.01.2000	Privat
A-Titel	A-Vorname-NEU-Firma	A-Nachname	A-Firma	01.01.2000	02.01.2000	Privat
Titel	N-Vorname	N-Nachname	Firma-1	01.01.2000	01.01.2000	Privat

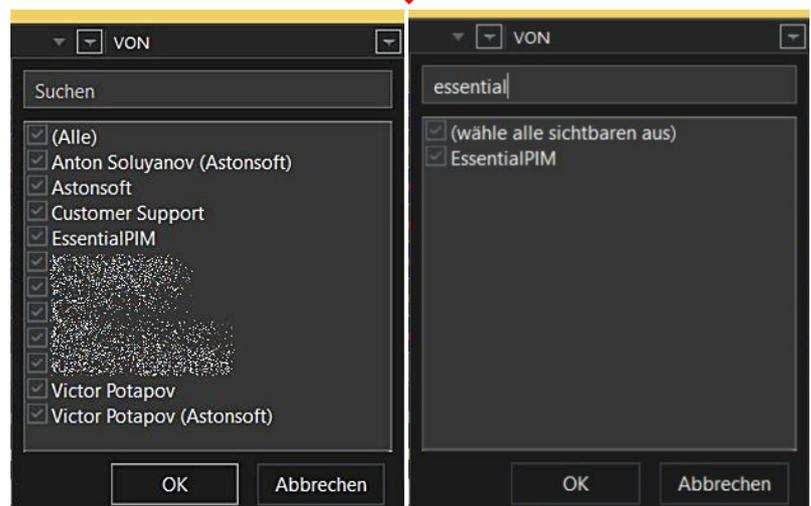
**Make notes more accessible / viewable via a tab !**  
(Saves scrolling to the notes)



1. ONE archive for all mailboxes (central archive) and when archiving emails, the structure of the mailbox is preserved. In the central archive there is a folder for each mailbox and the structures (folders) from which the emails were archived are retained in this respective mailbox folder.
2. Creation of a list view of ALL emails stored in the email module of EPIM includes a query (search) for all email accounts and the archive as well as all their subfolders (So far there is only one query for all "inboxes" for all email accounts). This list view can be accessed via the entry "All Emails" can be viewed in the "Smart Lists".
3. Based on the list view of complete emails from all email accounts and the archive, individual "Custom Views" can be created according to the current Requirements can be created and saved as templates. These templates of the "Custom Views" should then be able to be adopted into the "Smart Lists".
  - The **sorting** should also be saved in the "Custom View"
  - To create "Custom Views" the filter for the database fields "To " and "From" must also be refers to the actual email addresses and not just to the names displayed in the filter list..

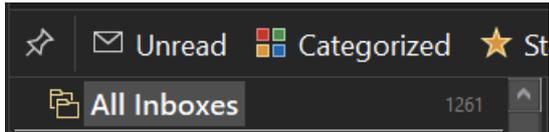


A "central archive" enables central management of archived emails and makes their handling and export easier.

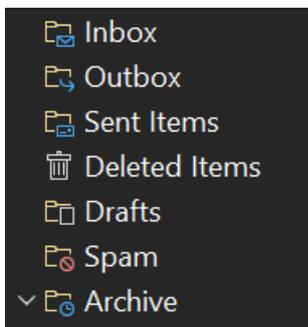


3. Based on the list view of complete emails from all email accounts and the archive, individual "Custom Views" can be created according to the current Requirements and saved as templates. These templates of the "Custom Views" should then be able to be adopted into the "Smart Lists".

Currently there is a list of all incoming emails from all accounts.

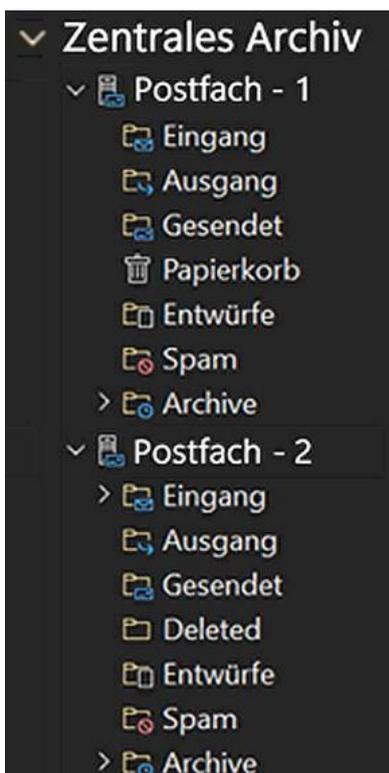


I want a complete list of "all" emails, from all accounts and their subfolders.



and as far as available the emails of further folders

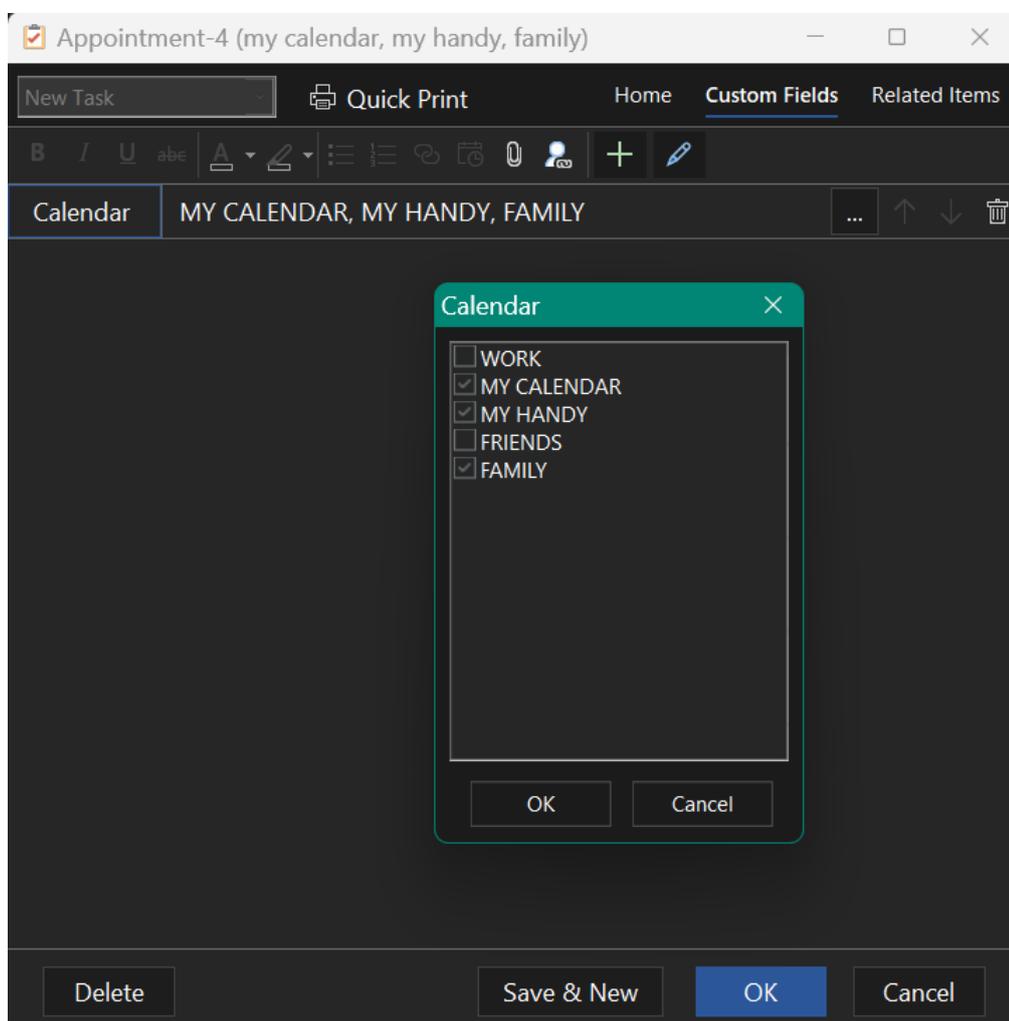
If there should be a central archive, all emails of this archive should also be included in the list.



Currently it is not possible to synchronize multiple calendars with one account / device.

If currently a person should receive selected appointments from different calendars from me via synchronization with a common account, this can only be realized in EPIM via a newly created calendar. For this I have to copy the corresponding appointments into this new calendar, taking into account that appointments from subscribed calendars cannot be copied. This is very time-consuming or not possible if the appointments are from subscribed calendars.

- ALL appointments are to be stored again (as in earlier versions of EPIM) in one appointment list.
- For the assignment of the appointments to calendars a checklist is used, which is added as a new database field to the dialog window for appointments.



- With this checklist an appointment can be assigned to several calendars.

CALENDAR	APPOINTMENTS									
	Appointment-1	Appointment-2	Appointment-3	Appointment-4	Appointment-5	Appointment-6	Appointment-7	Appointment-8	Appointment-9	Appointment-10
WORK	X		X				X	X		
MY CALENDAR	X	X	X	X	X	X	X	X	X	X
MY HANDY	X	X	X	X	X	X	X	X		
FAMILY			X	X	X		X			X
FRIENDS			X		X	X		X	X	

- The crosses indicate which appointment should appear in which calendar or with which calendar the appointment should be synchronized.
- The calendars to be displayed can be selected from the calendar list.
- For synchronization, the calendar list is filtered by the calendar to be synchronized.
- Appointments that are added to EPIM during synchronization are assigned the calendar name in the checklist with which the synchronization took place.

Instead of the current account-related calendars, I would like to see a context-related view and synchronization of appointments that are oriented to the respective needs of the user.

The screenshot shows the EssentialPIM Pro Portable application window. The title bar reads "D:\Downloads\epim117rc\Database\test.epim - EssentialPIM Pro Portable". The menu bar includes "File", "Edit", "View", "Go", "Actions", "Tools", and "Help". The main interface features a left sidebar with a "Calendars" list containing: WORK, MY CALENDAR, MY HANDY, FRIENDS, FAMILY, and Tasks. Below this is a monthly calendar for September 2023, with the 22nd highlighted. The main area displays a "Customized view" for the week of 18.09.2023 to 24.09.2023 (Week 38). The time slots range from 08:00 to 16:00. Ten appointments are visible, each with a checklist icon and associated calendars:

- Appointment-1 (work, my calendar, my handy) - 09:00-10:00, Mo 18
- Appointment-2 (my calendar, my handy) - 13:00-14:00, Mo 18
- Appointment-3 (work, my calendar, my handy, family, friends) - 09:00-10:00, Di 19
- Appointment-4 (my calendar, my handy, family) - 14:00-15:00, Di 19
- Appointment-5 (my calendar, my handy, family, friends) - 11:00-12:00, Mi 20
- Appointment-6 (my calendar, my handy, friends) - 13:00-14:00, Mi 20
- Appointment-7 (work, my calendar, my handy, family) - 09:00-10:00, Do 21
- Appointment-8 (work, my calendar, my handy, friends) - 14:00-15:00, Do 21
- Appointment-9 (my calendar, friends) - 09:00-10:00, Fr 22
- Appointment-10 (my calendar, family) - 12:00-13:00, Fr 22

The bottom status bar shows "Items: 10", "Duration: 18 hours", and "0" notifications.

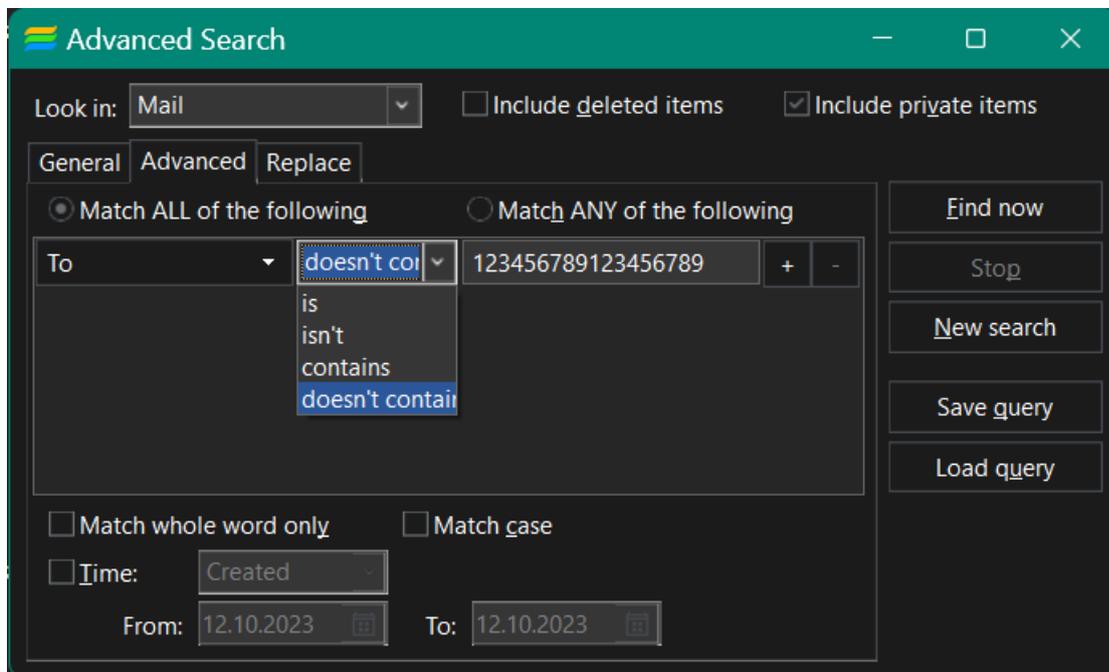
Behind each calendar listed in the example hides a synchronization target. Behind the calendar "my handy" hide all appointments that should be synchronized with my Android phone directly via Wifi. For example, if I have a business appointment called "business trip" in the calendar "work", which I also want to transfer to my cell phone and about which I also want to inform my family, I will assign this appointment to the calendars "work", "my handy" and "family" in the calendar checklist. If I now synchronize the calendar "my handy" with my cell phone, the appointment "business trip" will also be transferred to my cell phone. When synchronizing the other calendars, only the appointments that have a corresponding assignment in the calendar checklist are transferred.

When synchronizing my business calendar, which I synchronize via CalDAV, with the calendar "work" in EPIM, new appointments from the CalDAV server should be assigned to the calendar "work" in the calendar checklist during synchronization.

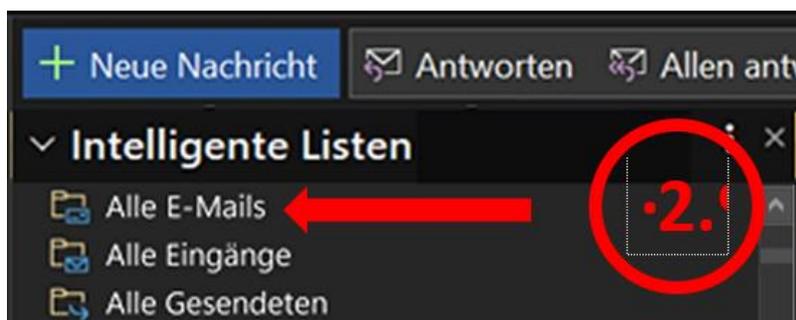
EVERY SINGLE appointment can be managed individually and is not assigned to one synchronization target but can be assigned to several calendars at the same time. Whereby the listed calendars are only filtered data of an appointment list which contains ALL appointments. In my example "Appointment-3" is assigned to five calendars (synchronization targets, accounts). If I could synchronize multiple calendars with one account, then ALL appointments will be synchronized (all appointments of my business calendar, all appointments of my family calendar ...). But I don't want to synchronize all appointments of my business calendar with my family calendar but only an individual selection. With my proposal EVERY SINGLE appointment can be managed individually - oriented to the needs of the situation and the users.

>> And finally the ability to specify **participants for an appointment** that will be synchronized with Android !

This list of all emails from all email accounts and their subfolders can be generated using advanced search. The advanced search listed below should return a list of all emails from all email accounts.



This list "All Emails" (Alle E-Mails) should then be listed as a component of the Smart List to be created in the Email module. Additionally, the Smart List could include "All Inboxes" (Alle Eingänge), "All Sent Items" (Alle Gesendeten) ... .



It should also be possible to include templates of the "Custom Views" (Benutzerdefinierte-1, Benutzerdefinierte-2) in the Smart List.



C:\Users\Konto 1\Daten\Dateien\EPIM-1171 ab 02102023.epim - EssentialPIM Pro

Datei Bearbeiten Ansicht Gehe zu Aktionen Extras Hilfe

+ Neue Nachricht Antworten Allen antworten Weiterleitung Senden/Empfangen Nachverfolgen Archivieren Filter Suchen in: Von <Ctrl+Q>

Intelligente Listen

- Alle E-Mails
- Alle Eingänge
- Alle Gesendeten
- Alle Spam-E-Mails
- Alle Papierkörbe
- Benutzerdefinierte - 1
- Benutzerdefinierte - 2

Alle Postfächer

- Postfach - 1
  - Eingang
  - Ausgang
  - Gesendet
  - Papierkorb
  - Entwürfe
  - Spam
  - Archive
- Postfach - 2
  - Eingang
  - Ausgang
  - Gesendet
  - Deleted
  - Entwürfe
  - Spam
  - Archive

Zentrales Archiv

Einträge: 369 Ungelesen: 0

DATUM	VON	AN	BETREFF
26.08.2023 09:45	Anton Soluyanov (Astonsoft)		[Astonsoft] Re: AEPIM 6.0.14
25.08.2023 15:47	Astonsoft		[Request received]
25.08.2023 14:50	Astonsoft		[Request received]
25.08.2023 12:27	Anton Soluyanov (Astonsoft)		[Astonsoft] Re: EssentialPIM Pro v. 11.6.6
25.08.2023 12:13	Anton Soluyanov (Astonsoft)		[Astonsoft] Re: EssentialPIM Pro v. 11.6.6
24.08.2023 23:33	Astonsoft		[Request received]
24.08.2023 23:18	Astonsoft		[Request received]
24.08.2023 14:31	Astonsoft		[Request received]
22.08.2023 11:48	Anton Soluyanov (Astonsoft)		[Astonsoft] Re: Error - EssentialPIM Pro v. 11.6.5

Betreff: [Astonsoft] Re: Error - EssentialPIM Pro v. 11.6.5 22.08.2023 11:48

Von: "Anton Soluyanov (Astonsoft)" <epimsupport@essentialpim.com> An: [Redacted]

Klicken, um E-Mail-Bilder zu laden

##- Please type your reply above this line -##

Your request (103140) has been updated. To add additional comments, reply to this email.

**Anton Soluyanov (Astonsoft)**  
Aug 22, 2023, 12:48 GMT+3

Hello,

We'll research you database and logs. Thank you.

Regards,

Anton

For a better management of my notes, I would like to have a list view, so that I can prepare my notes depending on the respective request (filter, sort, search) or for specific actions (print, export, ...).

EPIM already provides some options for this, but unfortunately they are located in different places of the program interface and each serve different purposes:

- Search by different criteria - twice in the toolbar and in the "Edit" menu.
- Advanced search
- Intelligent list
- In the "View" menu the menu items "Sticky notes" and "Sort by...".
- Selection list "Local notes"

Using a list view with filters for the different fields, an individual preparation of the notes can be done, oriented to the respective concern. The notes could then be evaluated by all available criteria: tree, path, note title, note content, public, read only, creation date, edit date, view date, size, attachment, link, favorite, tags, ...!

If in the module Notes then also a "Custom View" would be available, the respective representations could be saved also still as templates and be made available in the "Intelligent List" (smart list).

C:\Users\Konto \Daten\Dateien\EPIM-1171 ab 02102023.epim - EssentialPIM Pro

+ Neue Notiz ✎ Bearbeiten ✕ Löschen ↶ ↷ 📄 Klebezettel ↕ Alles aus-/einklappen 🔍 Suchen... 📄 Listenansicht 🔍 Filter 🔍 Suchen in: Titel <Ctrl+Q>

⏪ ⏩ EPIM 11.6 🏠 benutzerdefinierte Ansicht 📄 Keine Vorlage

ERSTELLUNGSDATUM	ÄNDERUNGSDATUM	ORT	BETREFF	TAGS
04.07.2023 15:16	10.09.2023 13:01	Sammlung	EPIM 11.6	
26.06.2020 11:11	10.09.2023 13:01	Sammlung	EssentialPIM 9.1	
05.04.2023 12:51	09.04.2023 21:33	Sammlung	EPIM ToDo	
03.07.2021 21:52	17.08.2023 21:50	Software	Lebenslang freie Updates für EssentialPIM Pro License - Order	
07.03.2020 17:22	10.05.2023 21:47	Sammlung	EPIM	
10.09.2023 12:54	10.09.2023 13:02	Sammlung > EPIM	Notizen Fehler Synchronisation	
20.01.2023 12:08	17.08.2023 21:29	Sammlung > EPIM	EPIM - FollowUp	
06.10.2022 12:27	17.08.2023 21:31	Sammlung > EPIM	EPIM Abonnement	
03.02.2023 12:04	17.08.2023 21:31	Sammlung > EPIM	Synchronisation Handy	
20.01.2023 12:02	17.08.2023 21:32	Sammlung > EPIM	EPIM - FollowUP - Aufgaben	

Intelligente Listen:
 

- Alle Notizen: 393
- Favorisierte Notizen: 2
- zuletzt angesehen: 25
- zuletzt bearbeitet: 19

 Lokale Notizen:
 

- Sammlung
- Sammlung

Einträge: 6 🔔 0 7 Wörter 🕒 Bearbeitet: 10.09.2023 13:01 🔍 101%

- >> Each note should have an additional tab (TAB) with all the information about the note!  
(tree, path, note title, note content, public, read only, creation date, edit date, view date, size, attachment, link, favorite, tags, ...)



- >> When a note is selected or displayed, the note should be marked in the list of notes and the tree in which the note is located in the list of local notes.

