EssentialPIM Help

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1 Introducing EssentialPIM

Welcome to EssentialPIM Free!

EssentialPIM Free is an absolutely free personal information manager that can store, manage and encrypt data: day/week/month/year schedules, to do lists for keeping all your appointments up-to-date, notes (pictures, tables, any formatted text), password entries, fully-functional mail module and contacts. Offers AES 128-bit encryption, Android and iOS synchronization, MS Outlook import/export, search capabilities, versatile print features and adjustable contacts storage with unlimited number of fields.

Thought out simplicity is the power - our motto. Enjoy.

1.1 Features

EssentialPIM Free is a full-featured personal information manager, which offers:

- Excellent usability. Shortcuts that are fun to use and boost your productivity. Easy, intuitive tools arranged right where you need them
- Security. All data can be password-protected and the database file is encrypted with the advanced industry standard AES (Rijndael), 128-bit key
- Versatile import and export capabilities. You can import and export HTML, RTF, CSV, TXT and TreePad. You can perform import/export with Microsoft Outlook
- Synchronization with Android and iPhone/iPad
- Available in many languages, including: Bulgarian, Chinese (simplified), Czech, English, French, German, Hellenic, Hungarian, Indonesian, Italian, Japanese, Norwegian, Polish, Portuguese, Russian, Slovak, Spanish, etc.
- System tray icon with a hotkey for starting and configuring the software
- Open-source Firebird database. Advanced users and system administrators get great flexibility in managing databases

2 License

EssentialPIM(tm) License Agreement.

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3 About this help manual

This manual describes EssentialPIM features and some useful methods that can be utilized to work with the application more efficiently. In order to ease information perception we use a number of symbols represented below.

Bold font is used to show interface elements the same way as they can be seen in the program. This can be a dialog window, a tab, an option or a button which you need to click to perform some action.

Useful tip that simplifies usage of a described feature. Shortcuts are displayed here as well.

Useful information that you should take in consideration.

Very important info. Usually it's a necessary requirement for correct work.

4 Working with EssentialPIM

EssentialPIM implements a number of features. Most of them are intuitive, which allowed to make simple interface. The following topics describe steps you need to take in order to work effectively with the program and also make it easier to organize and synchronize your data.

Calendar - day planning the versatile way

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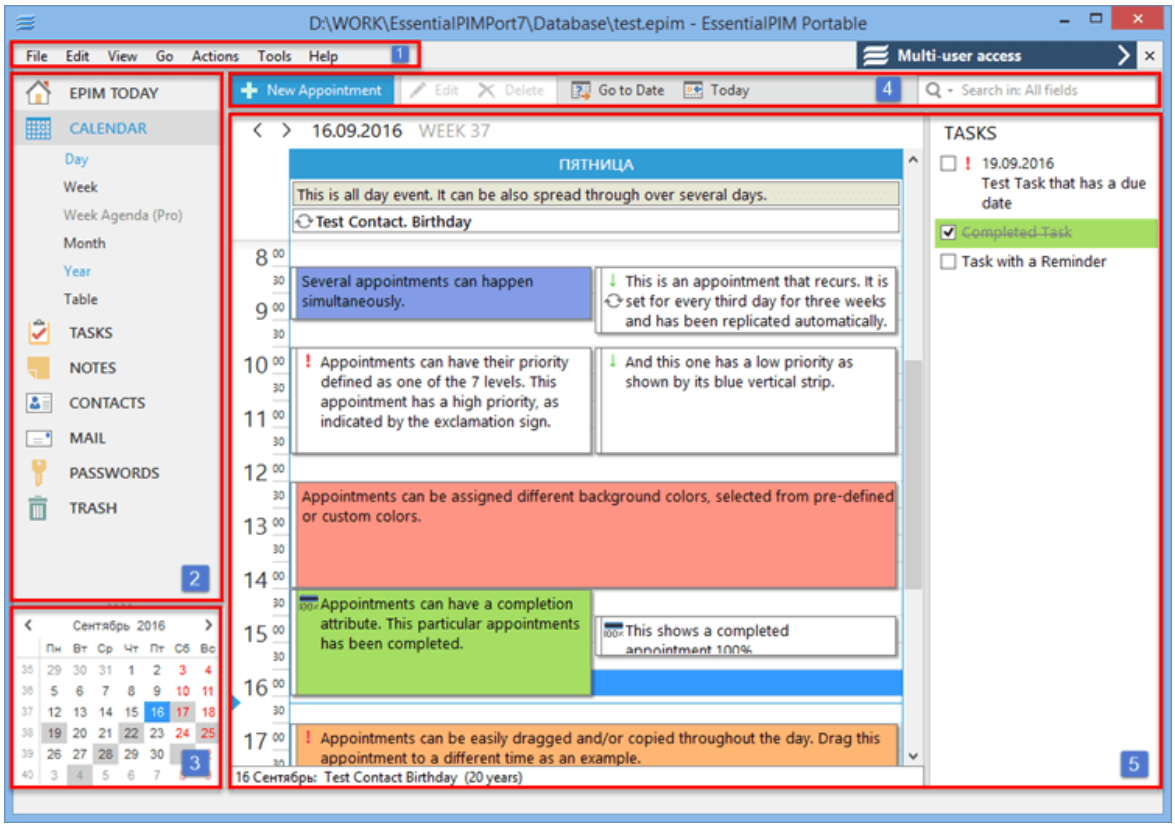
Tasks lists - quick and simple list of things to do
Notes - any data can be stored in tree-structured notes
Contacts - all contacts organized
Passwords - powerful password managing tool
Mail - built in e-mail client

Below is the main EssentialPIM window:



Section 1: Main menu with a list of commands available in the program.

Section 2: This is the navigation panel, where you can switch between EssentialPIM modules and views. Navigation panel can be minimized or maximized by pressing on the small arrow button on top of the panel.

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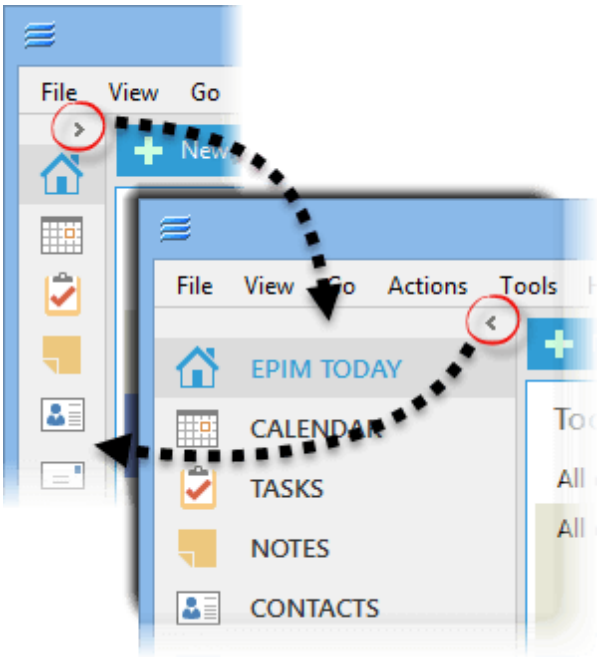

You can adjust modules which appear in this section by clicking on **Tools -> Options -> Modules**. Or right click on any of the module's name.

Section 3: Calendar with marked busy days.

The number of calendars can be expanded by dragging up the divider between the calendar and the EPIM modules section.

Section 4: Module tool bar offers ways to work with and manage records. Its contents depend on the currently active module.

Section 5: Main view, depends on the currently opened module.

4.1 Working with database files

4.1.1 Starting EPIM

The First Run

When you run EssentialPIM Free for the first time, it creates **test.epim** database file that consists of sample items for better understanding of how the program works. You can continue working with the file or create a new one by clicking on **File -> New -> EPIM database file**

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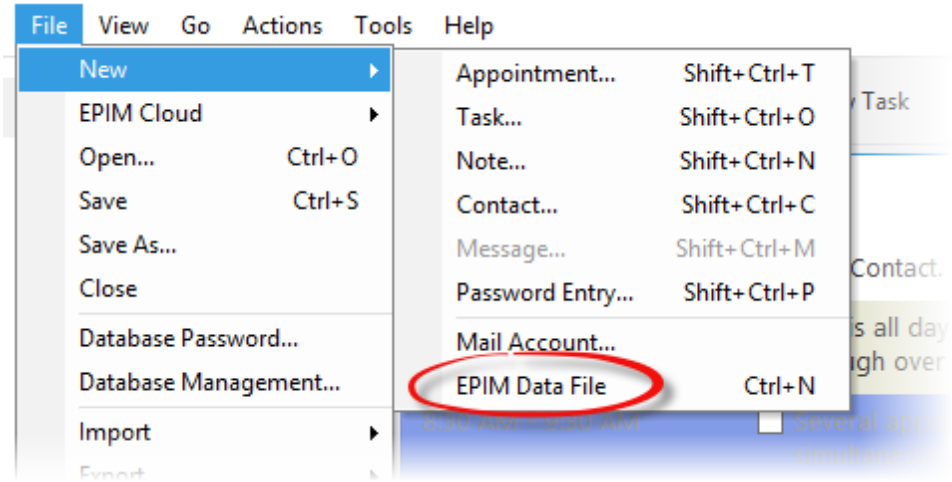
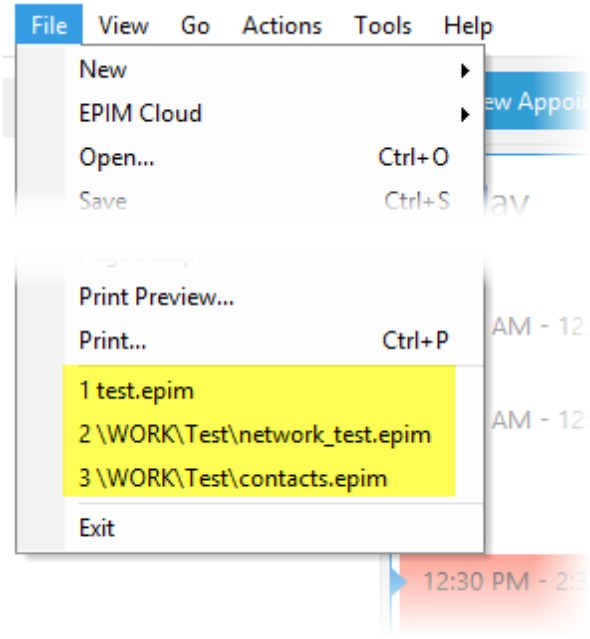


When you create a new database file, its name looks like **temp.32B51682.epim**. The file can be saved under any other name you prefer. Use **File -> Save/Save as** command for this, or confirm database save on program close. It's recommended to save the database file under some name different from the default temporary file name in order to prevent file naming mess in the future.

Note, the word "test" in the file name doesn't mean that file or program runs in the trial mode. It's just a file name that can be changed any time.

Subsequent runs

EssentialPIM Free remembers the last used file and opens it up automatically upon next start. The program also stores the list of last opened database files. The list can be seen by clicking on **File**.



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This is useful if you use several databases and need to access them fast. You can also use this menu if the database file you used last time wasn't opened automatically on start.

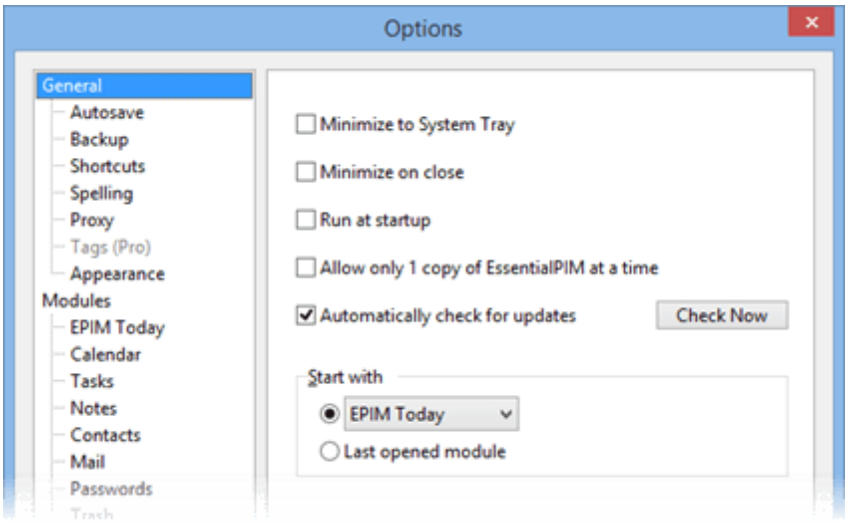
Any existing database can be opened by clicking on **File -> Open**.

The default paths for EssentiualPIM Free database files are:
C:\Documents and Settings\User Name\Application Data\EssentialPIM\ - for XP
C:\Users\User_name\AppData\Roaming\EssentialPIM\ - for Vista, 7, 8 and 10.
Note, it's not necessary to store EssentialPIM database files in these folders. Database files can be moved to any other location on the hard drive.

If you use several *.epim database files, it might be useful to create desktop icons that will open particular files directly. To do this, open EssentialPIM icon properties and add path to the database into the **Object** field after existing path.

EssentialPIM Free start options

EssentialPIM Free can be started manually or automatically with Windows. It's also possible to limit EssentialPIM Free to only one running instance. These and some other settings can be found in **Tools -> Options -> General**



Minimize to System Tray - program window minimizes to system tray instead of the task bar.
Minimize on Close - Close button works as Minimize. Enabling this option guarantees no reminder will be missed because of the accident program's closing.

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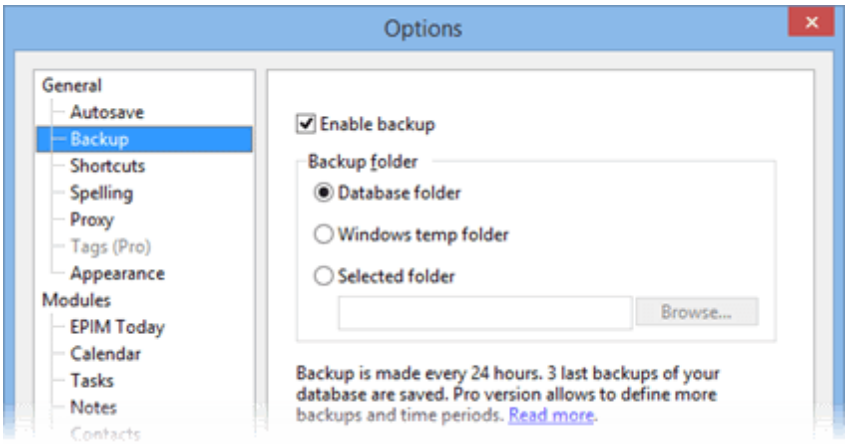
Run at Startup - automatically runs EssentialPIM Free on Windows start.
Allow only 1 copy of EssentialPIM at a time - when this option is enabled, only 1 running instance of EPIM is possible.
Automatically check for updates - when enabled, EssentialPIM checks for updates automatically every couple of days. You can also check for updates manually by clicking on the **Check Now** button.
Start with - choose which module EssentialPIM is going to start with.

When **Minimize to System Tray** option is enabled along with **Run at startup**, it may appear that EssentialPIM icon is hidden in the system tray. This makes an impression that the program is not running. If you try to open EssentialPIM manually under these circumstances, the new program instance gives an error that the database file is being used by anther process. This is actually true because file is already running in another EssentialPIM instance. To resolve or prevent this problem, set EssentialPIM Free icon to always be shown in the system tray settings.

Shift+Ctrl+S - global shortcut that minimizes/maximizes the program window.

4.1.2 Backup

EssentialPIM Free offers an advanced backup feature. Backups of your *.epim database files are being made on the fly. This helps to keep your data safe under any circumstances. By default EssentialPIM creates two backup files in the same folder where the original database file is stored. Backup settings can be accessed by clicking on **Tools -> Options -> Backup:**



Enable backup option turns the backup feature on (enabled by default). We do not recommend turning it off, otherwise you will not be able to restore you database file in case of any failures.

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Backup Folder section allows to choose where backup files will be stored. Backups can be created either in the same folder where you main database file is stored or in the standard Windows temp folder or you may specify a folder yourself by choosing this options and pressing the **Browse** button.

Note, EssentialPIM cannot save backups to a network locations or NAS drives. Thus make sure that you are using local path when setting custom backup folder.

Different types of backup files

my_database.epim – regular EssentialPIM database file that was created by a user (you can always create a new file by clicking on **File -> New**). Path to the currently opened database file can be seen at the top of the EssentialPIM window or by clicking on **File -> Database management**.

my_matabase.backup_20130118_1401.epim – regular backup file that was created by EssentialPIM according to the backup settings set in options. Numbers mean date (in yyyymmdd format) and time (in 24h format) when the backup was created. To save space a backup file is a compression version of the initial database file and hence the difference in size with it. To recover data from backup, open it as if it was a regular EssentialPIM database file by clicking on **File -> Open**.
Note, if you need to transfer your data to another PC or drive, simply copy the original database file over to the new location. There's no need to work with backup files in such cases.

Note, it's not necessary to use backup file when you need to transfer EssentialPIM data to another PC. Just copy your main database file to another PC and open in EssentialPIM.

restored.my_database.epim – restored backup file. We recommend to rename this type of files into something more user friendly (simply removing the "restored." part is ok) in order to prevent possible mess with future backup file names.

backup_convert_200130118_1521.epim.bak – these type of files are always created (in the folder where you original database file is stored) when EssentialPIM updates your database file to the new version. Usually happens when you run the new major EssentialPIM version for the first some. If something went wrong during the conversion process, you can always revert to the previous version of the file and open it with the previous version of EssentialPIM. To work with this kind of files, delete the .bak extension and open it in the previous EssentialPIM version by clicking on **File -> Open**. Older EssentialPIM versions can be obtained from here.

4.1.3 Database management

Normally EssentialPIM handles database maintenance automatically and users do not have to do anything in that regard. However, in some cases users wish to get more manual control over the process. The following examples will demonstrate what kind of tasks can be performed and what to expect from that.

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Database Management

EssentialPIM has a built-in database management tool that can be useful in fixing some database problems. The tool is available under **File -> Database Management.** This dialog also shows summary information about currently opened database file such as database location, size, amount of records of each type. Besides the database info this dialog provides some database maintenance tools.

Optimization. This process optimizes database by removing some bulk data from it, thus making it smaller in size and sometimes makes it a bit faster. Database optimization can be performed by clicking on the **Optimization** button. Running optimization is usually a preventative measure and is normally being done automatically by EssentialPIM time to time when a certain set of pre-defined criteria are met.

Note, before running optimization manually make sure that all synchronizations and mail send/receive processes are not active, otherwise the **Optimization** button will be inactive. To stop all the active processes, click on the **Stop All** button in the synchronization form or in mail send/ receive dialog window.

Archiving old records

If a database file is being in use for a long period of time then it can contain a large number of old records that might not be needed anymore. Removing old records from the database will make it smaller in size and can improve its performance. We have a special free supplementary application for this purpose - EPIM Archiver/DupeRemover. The Archiver part of the app can do any of the following:
- Move outdated items into the Trash
- Move items into another database for permanent archiving
- Delete outdated items permanently

More details about how to use EPIM Archiver/DupeRemover can be found in its help file. Note, major version number should be equal as for EPIM Archiver/DupeRemover as for EssentialPIM. I.e. EPIM Archiver/DupeRemover version 5.0 will work fine with database files from EssentialPIM version 5.03 and not with the database file from EssentialPIM 4.5.

Removing duplicates

EPIM Archiver/DupeRemover can also be used for checking database files for duplicates and removal of found duplicate items. The app searches for the duplicate entries through all the EssentialPIM modules. After duplicates are found, a list of automatically selected items for removal is shown. However, you can manually adjust which of the duplicate items to delete. All removed items will be moved to Trash where you can easily delete them permanently or restore later for future use.

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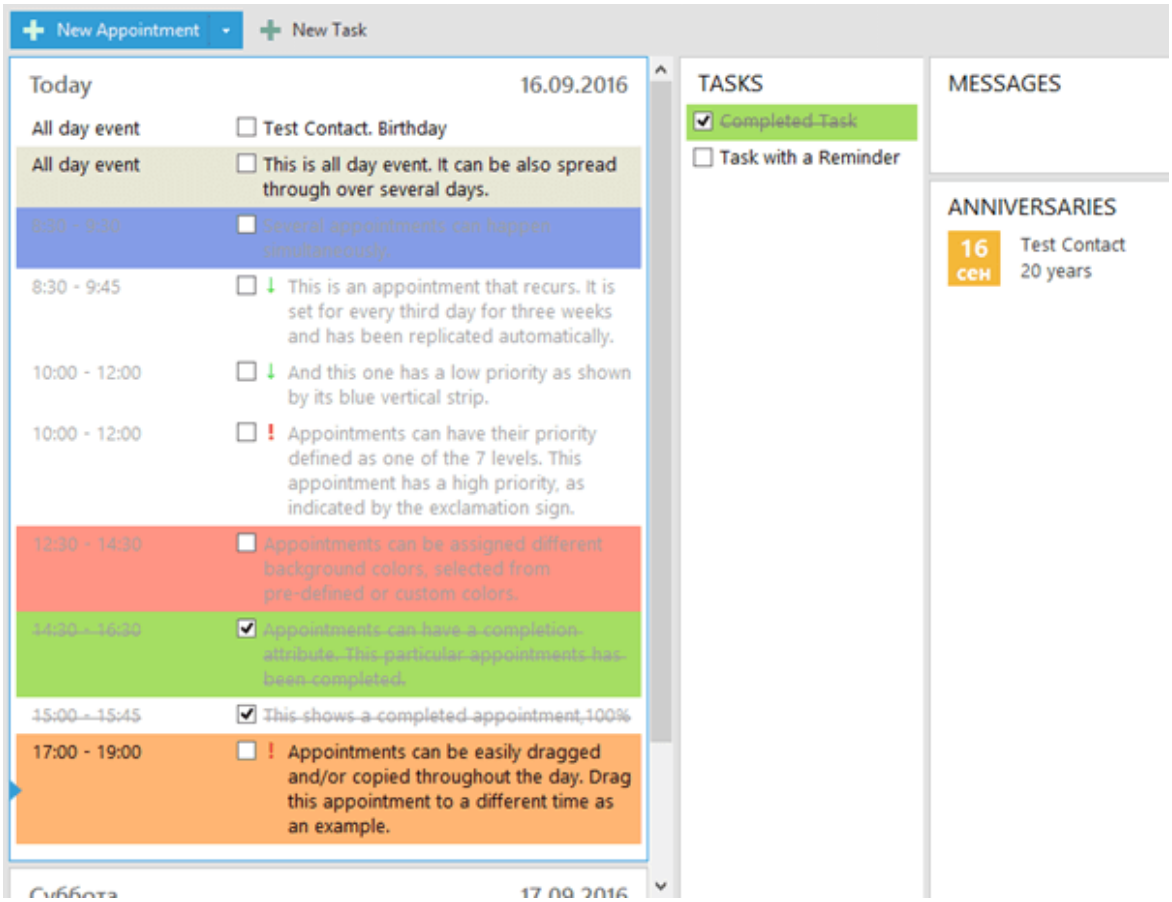
4.2 EPIM Today

EPIM Today shows an overview of Appointments, Anniversaries and Tasks for nearest days. You can configure EPIM Today settings in **Tools -> Options -> EPIM Today**.



Calendar section shows Appointments for today and 3 upcoming days (by default settings).
Tasks section shows list of upcoming Tasks.
Messages section shows mail folders with unread messages.
Anniversaries section only appears when there's an anniversary coming soon. Anniversaries are being taken from contacts.

Today Settings

Today module is often used as a summary of upcoming major and important events. All the sections in EPIM Today can either be turned on or off in EPIM Today options under **Tools -> Options -> EPIM Today**.

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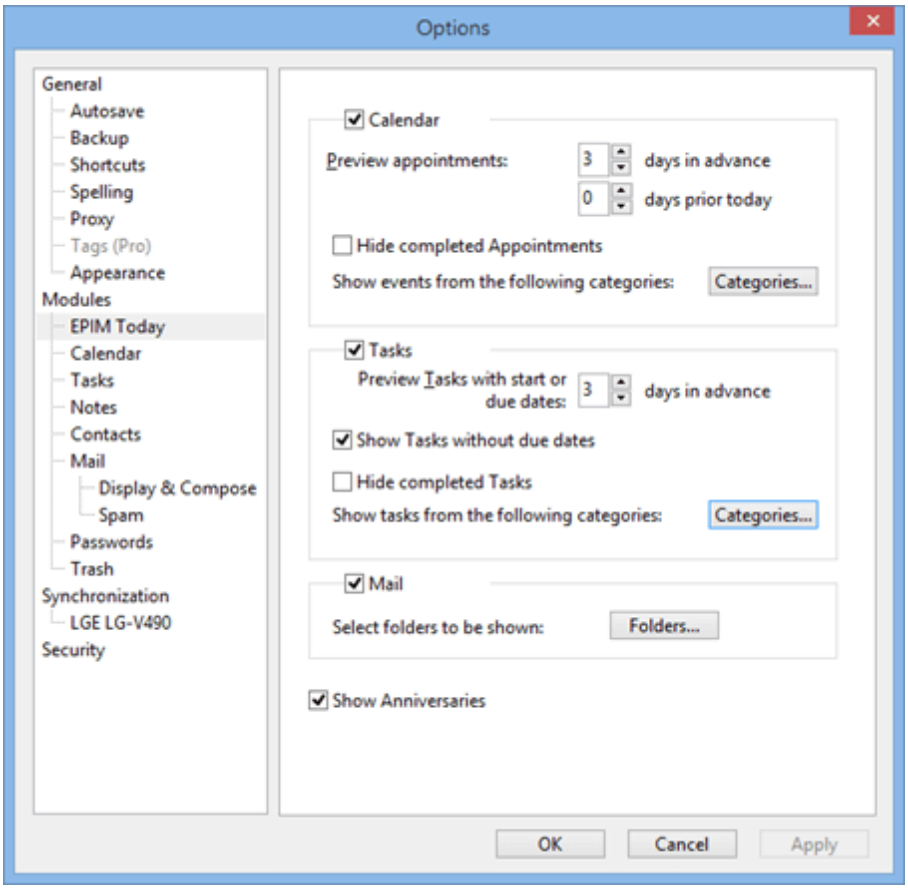

Calendar and **Tasks** sections allow you to adjust the number of days for previewing events and tasks. You will also be able to choose whether the completed items should be shown or not. Clicking on the **Categories** button will bring up a dialog window to choose items from which categories to show in EPIM Today.

The **Folders** button under the **Mail** section allows you to choose which mail folders to display in the Mail section of EPIM Today.

The **Show Anniversaries** checkbox turns on or off display of upcoming anniversaries in EPIM Today.

Any of the sections can be excluded from displaying in EPIM Today by unchecking the checkbox besides the section name.

EPIM Today settings will not affect any other similar options for other modules. For example, customized view settings or filters in Calendar or Tasks will not override EPIM Today settings. And vice versa EPIM Today settings have no effect on viewing options for other modules.

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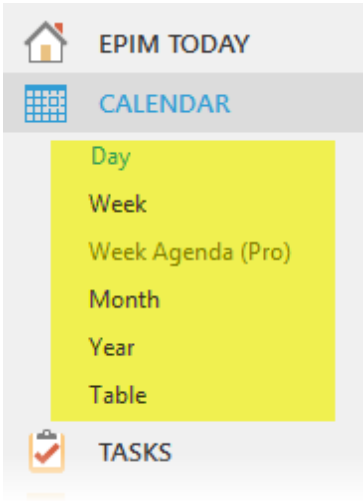
4.3 Calendar

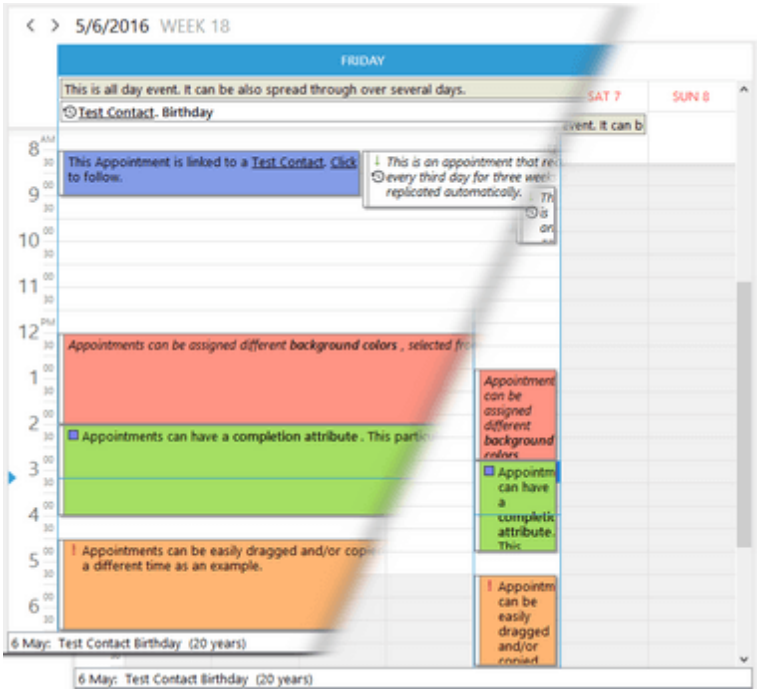
4.3.1 Calendar views

Calendar module is a key part of the EssentialPIM and serves to control and plan activities. Calendar can be displayed in different views: Day, Week, Month, Year, Table. Views can be switched under navigation pane in the left or under **View** menu.



Day/Week

Both of these views are identical and provide the same functionality. The only difference is that the day view shows events for a particular day and the week one can show several days (one week by default).



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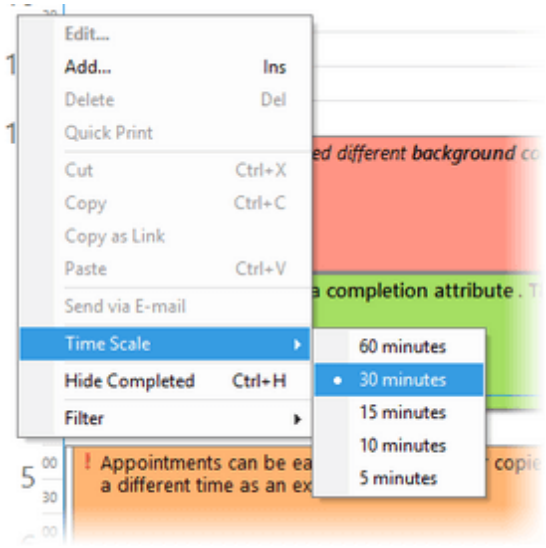
The main part of both views is taken by the time grid. Time grid is a useful tool for navigating through the calendar, track appointments, locate free time and create new appointments directly on necessary time. Appointments that have both start and due times within one day are displayed within a time grid according to their values. If an appointment takes whole day or lasts for several days then it is displayed at the top of calendars time grid.

Time grid in Calendar can be set to various time scales by clicking on **View -> Time Scale** or by right-clicking on the scale in the Day and Week views:



Work time is marked with lighter color, holidays are darker and their day numbers written with red font. These settings as well as many others can be changed in the calendar options dialog.

Month/Year

Both Month and Year views are identical by functionality. These views give summarized overview for longer time periods then week view.

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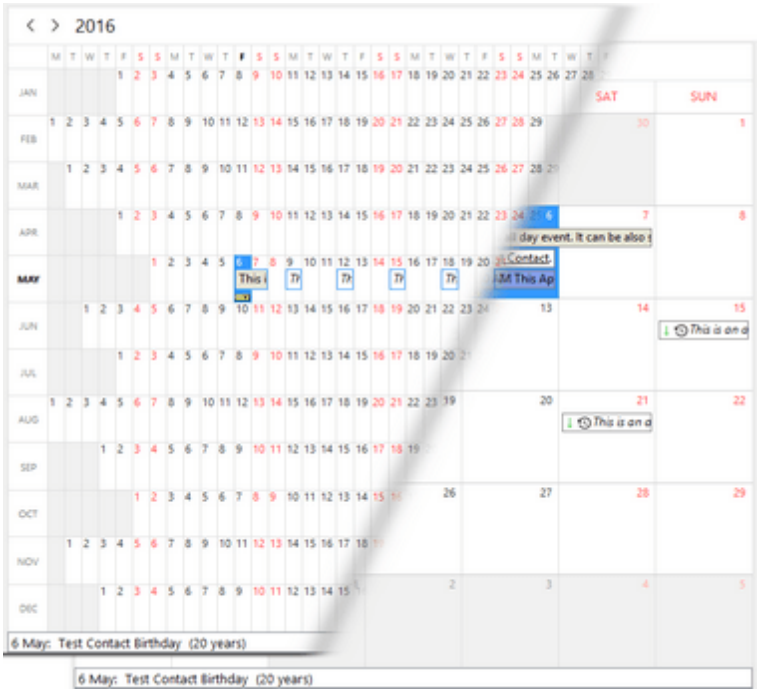
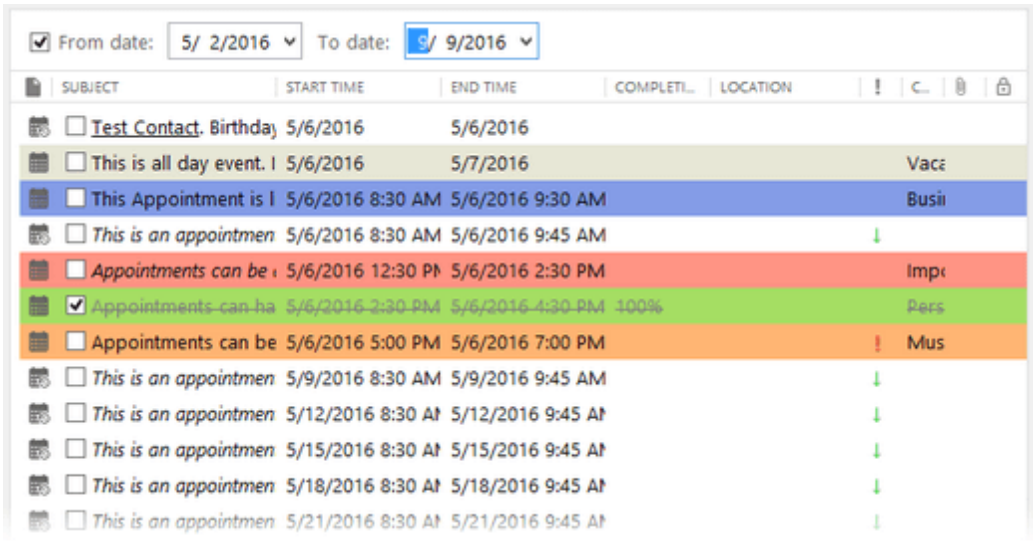


Table

If classic views are not enough for analysis then EssentialPIM can offer more detailed tasks summary with Table view. In this case all calendar events are represented as a table.



This view allows editing records in the same way as with table editor. Any data can be changed directly in the cells.

At the top of the view you can set dates range to display.

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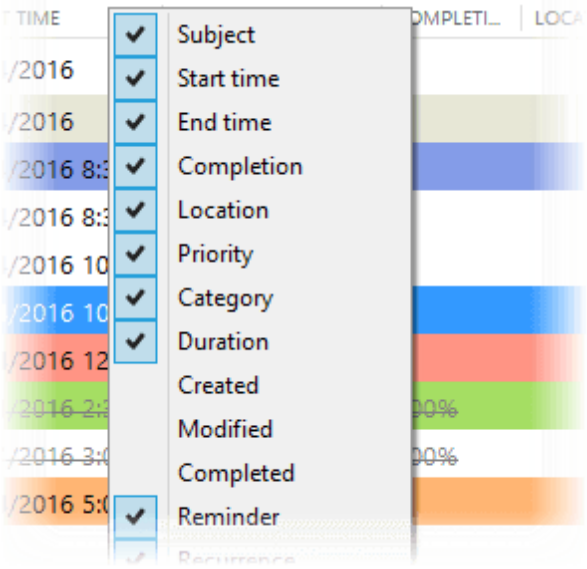
Any field in the table can be disabled/enabled under right-click menu.



Records can be sorted by any field. Click on the field caption in order to sort by it. Arrow icon shows sort direction, second click changes it to opposite direction. If you need to sort by several fields then click on them holding on Ctrl button.

You can use following shortcuts to switch between views:
Ctrl+D - Day
Ctrl+W - Week
Ctrl+M - Months
Ctrl+R - Year
Ctrl+E - Table

Calendar Settings

Calendar settings are available under **Tools -> Options -> Calendar**

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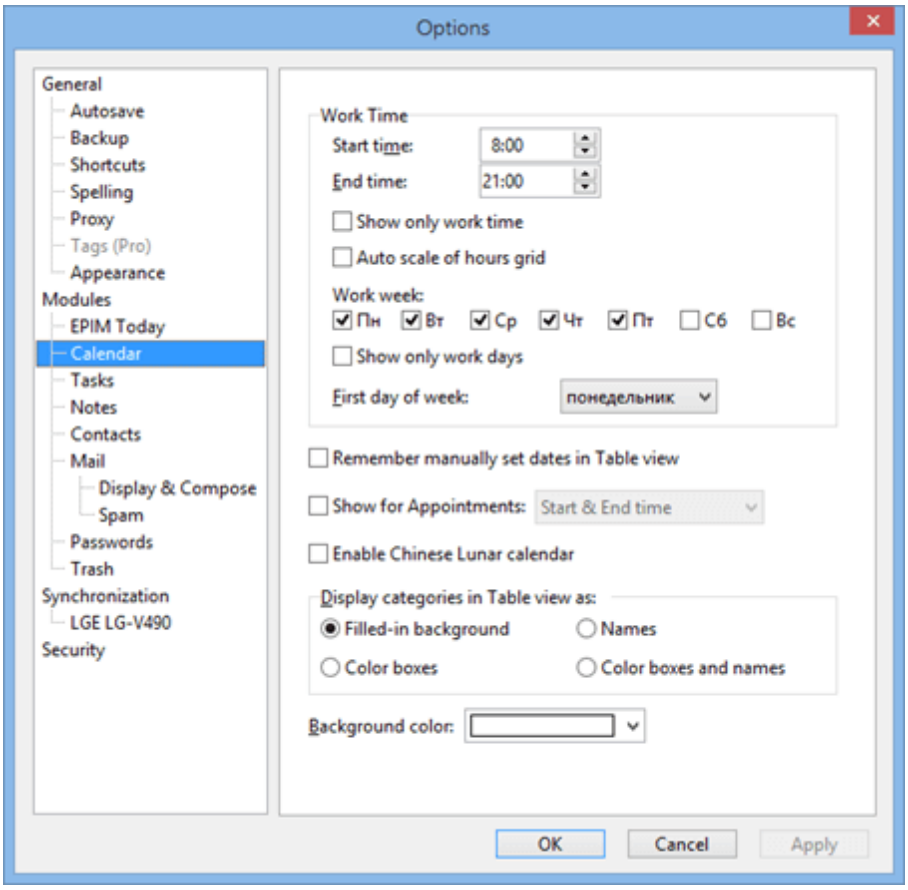

Work Time - Allows to set a time frame which is considered as work time. EssentialPIM shows it with lighter color in the calendar. It is also used for printing working hours.
Show only work hours - hides/shows non working hours in the day and week views.
Auto scale of hours grid - if displayed hours grid fills less space then available in the main view then enabling this option scales time grid to fit the screen.
Work week - this feature is similar to work time option, it allows to set which days are considered as working days. Non working days are shown with darker color and red day numbers.
Show only work days - hides/shows non working days.
First day of week - allows to set the first day of the week in the week and month views.
Remember manually set dates in Table view - Remembers dates range set in table view when switching to another views.
Show for Appointments... - this drop down menu allows to hide start or due time or both from displaying in calendar views. This is useful if you want to free up space for more text from records subjects.
Display categories in table view as - sets how to show categories in table view (doesn't affect other views).
Show grid lines - enables/disables grid lines in table view.
Background color - allows to set a background color which will be used as core color in all views (except table view)

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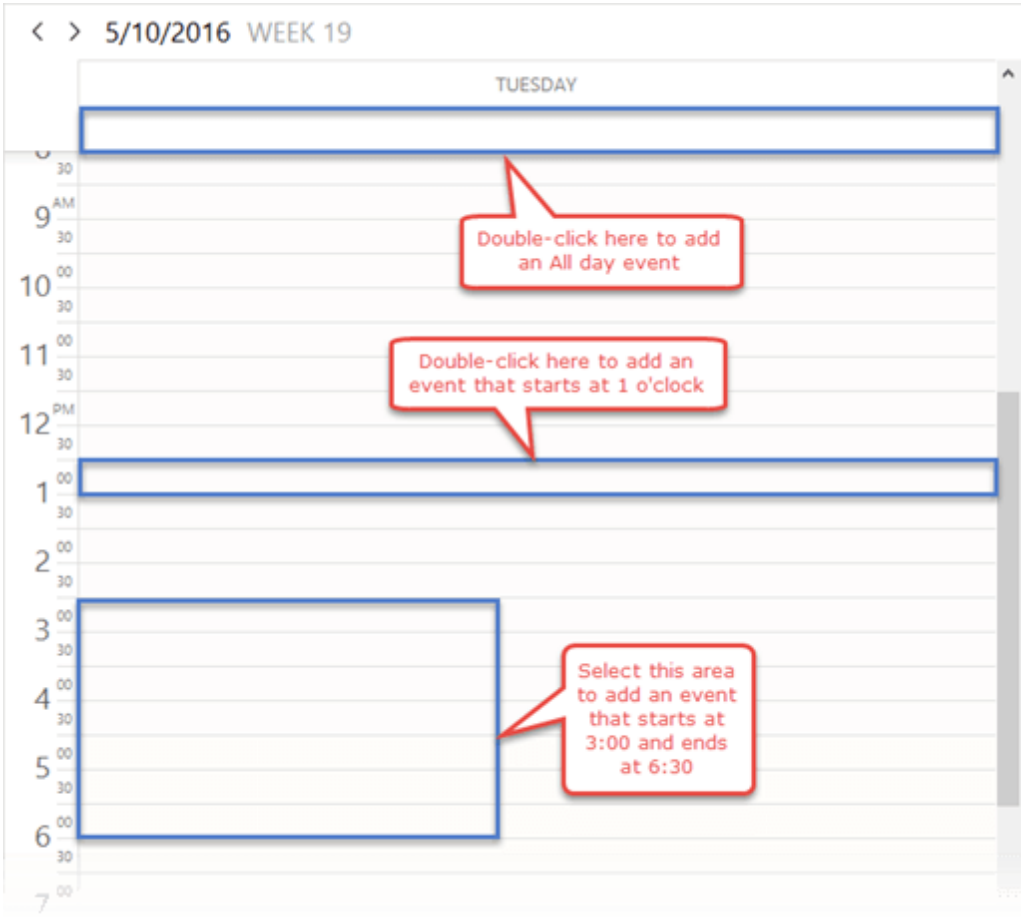
4.3.2 Adding an appointment

There are several ways of adding a new appointment. You can press on **New Appointment** button from the tool bar or you can add it under **Actions -> New Appointment**.

The screenshot below explains how to easily add a certain appointment:



Using mouse, highlight the time needed for the appointment and release the button: the new appointment pop-up windows appears. Just enter the text and, if needed, assign Priority, Category, Completion, Alarms and Re-occurrence, then press OK.

Double clicking anywhere in the calendar grid creates a new appointment on that time and open new appointment dialog.

One more easy way of entering a new appointment is placing selection to a necessary time and just start typing. This automatically creates an appointment on the selected time without opening appointment editing dialog.

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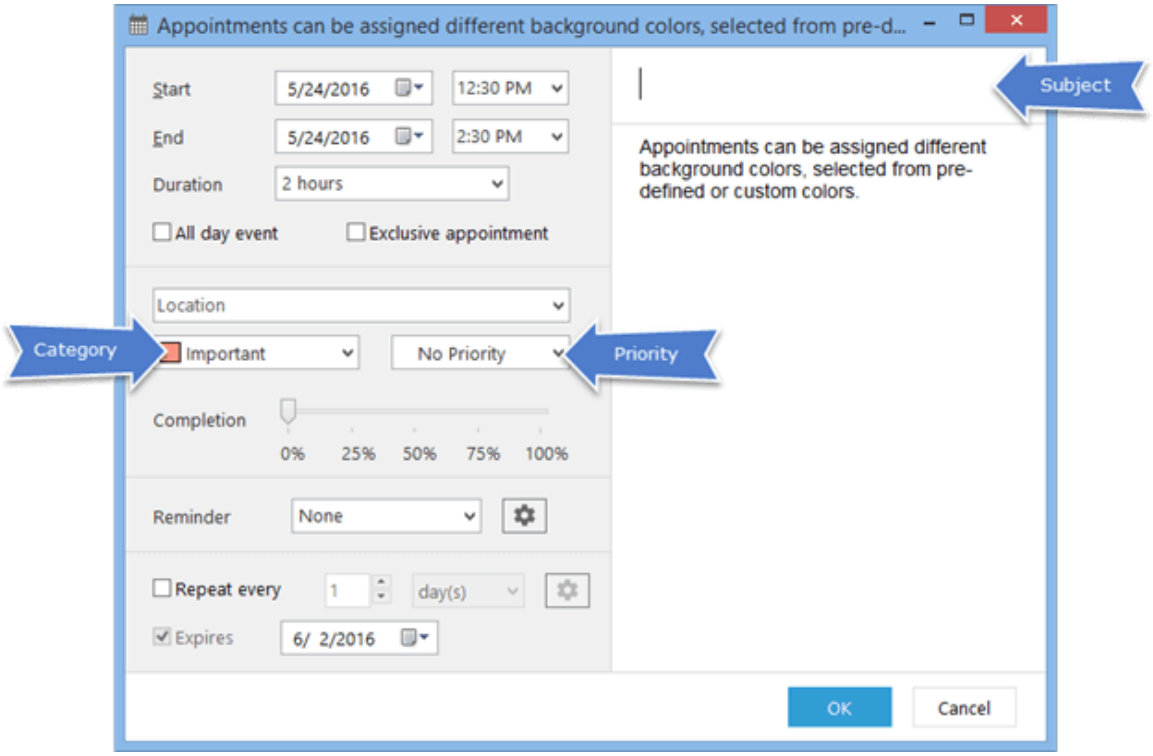
Shift+Ctrl+T - global shortcut for creating a new appointment (it works even when EssentialPIM is not active)
Appointment can be also added under **File -> New -> Appointment**

4.3.3 Editing an appointment

Appointments can be edited by double-clicking on them.



Subject - name of the appointment.
Location - location for the appointment. The list of locations will be saved and available for future use from the dropdown list. You can add, edit or delete locations using this menu. To do so, click on the **Manage Locations** option at the end of the list.

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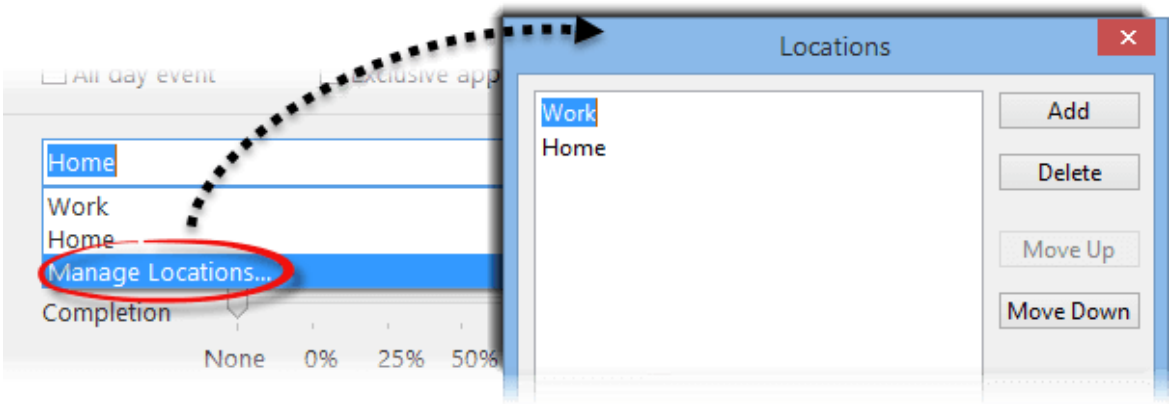
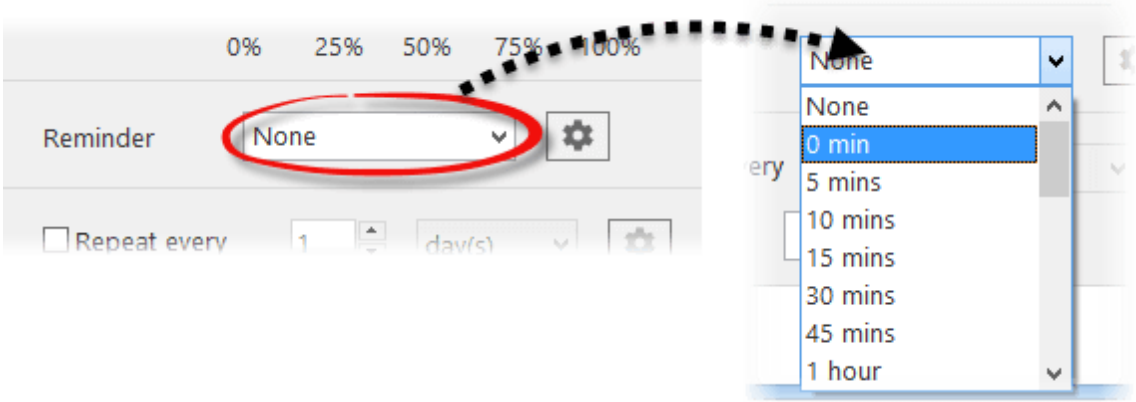


Start time - sets the start time.
End time - sets the end time.
Duration - automatically shows the duration of an appointment, can be edited manually.
All day event - an event for the whole day or days without start and end times.
Exclusive appointment - such appointments cannot be overlapped with other events, ensuring exclusivity of their timeframe.
Priority - allows you to set a priority.
Completion - sets a rate of completion.
Category - sets a category for an appointment. You can create custom categories by pressing the "..." button.

Reminder section

Enable reminder by clicking on the Reminder checkbox:



Additional reminder options can be set by clicking on the **Advanced** button:

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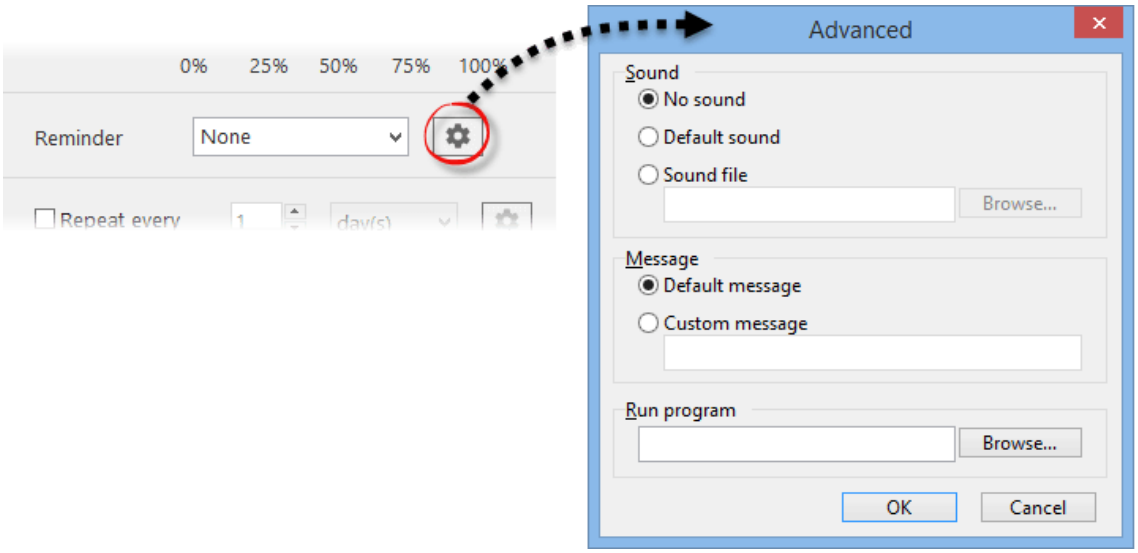
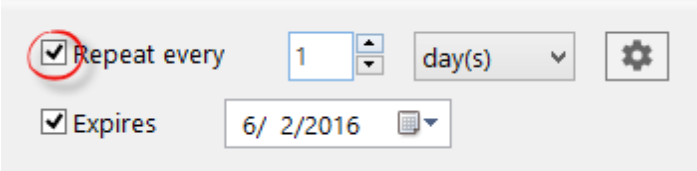


You will be able to choose whether a **Default sound** or any custom **Sound file** (*.wav or *.mp3) will be used for alerts.
Message field allows you to set a **Custom message** for the reminder.
You can also assign a program that will run with the reminder. Click on the Browse button and choose the desired app.

Repeat Appointment

Make a recurring appointment by enabling the **Repeat Appointment** checkbox



You can set daily, weekly, or monthly recurrences. By default an event will expire after 10 occurrences. Adjust the number or change the expiry date, if needed. For more complex recurrence patterns, click the **Advanced** button:

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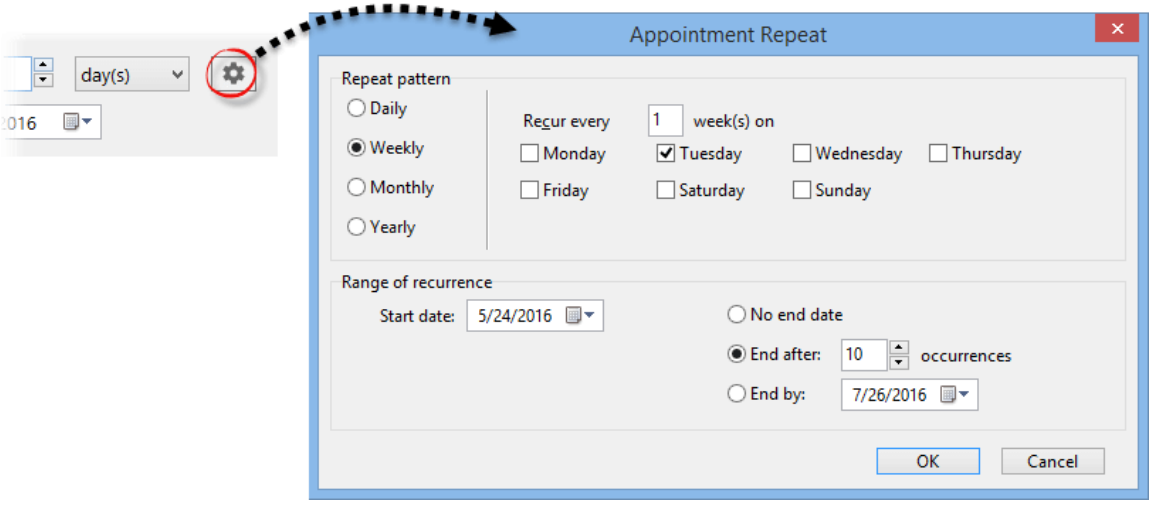

This dialog allows you to fine tune recurrence patterns. I.e. you can choose to repeat an appointment every second Tuesday every 3 months.

4.4 Tasks

4.4.1 Working with tasks

Tasks module is an easy and useful tool for managing tasks list. EssentialPIM allows to sort records by any sorting criteria, assign different priority statuses and categories. These and many other features give wide capabilities on managing tasks list.

Adding a Task

There are several ways of adding a new task. The easiest one is pressing on **Add** button on the tool panel, or by pressing on **Actions -> New Task** in the main menu.

It is also possible to add a task by double-click on main window in Tasks module or Tasks section in Calendar. Any of these ways open a **Task Info** dialog where you can enter subject, due dates, category and other settings. More details can be found in the Editing a Task topic.

Shift+Ctrl+O - global shortcut to create a Task (it works even when EssentialPIM window in not active).
Task can be also added under **File -> New -> Task**.

Tasks View Customization

EssentialPIM allows customization of columns set and their order in the main view.

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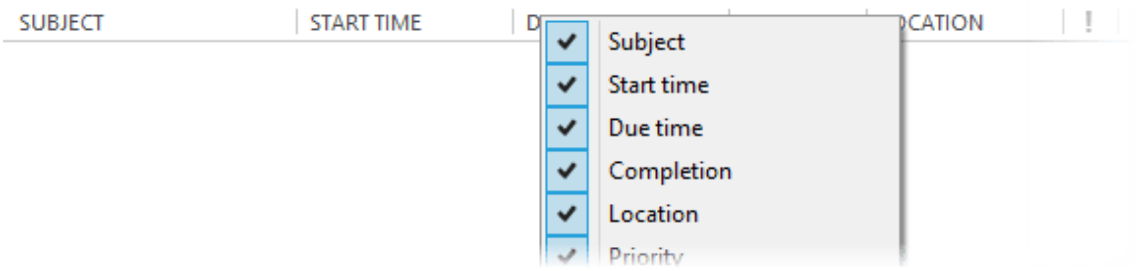
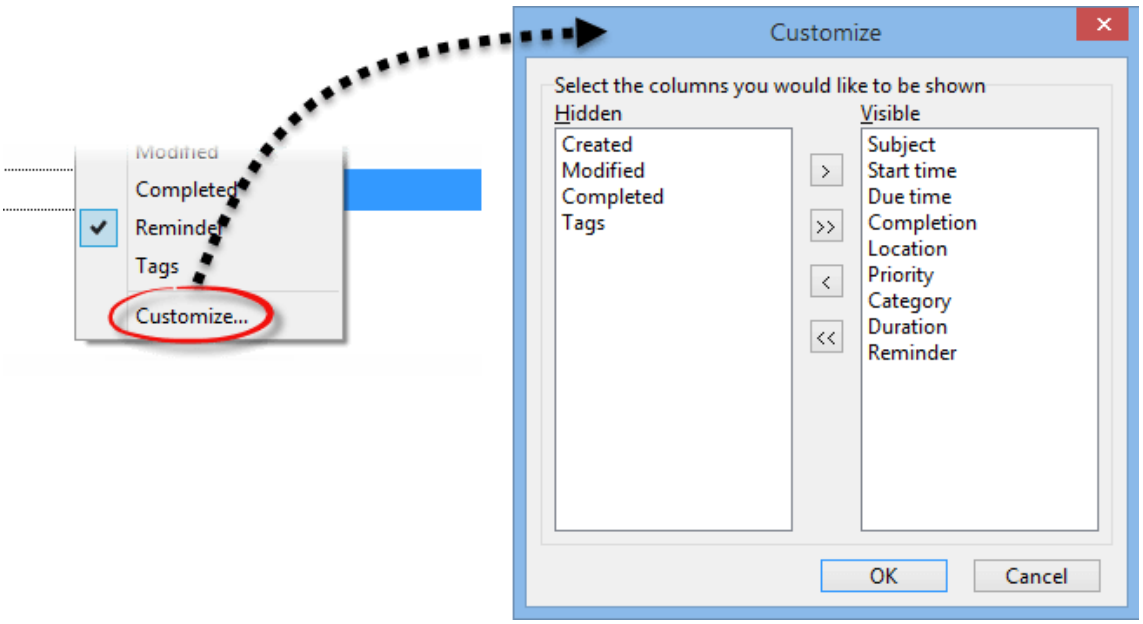
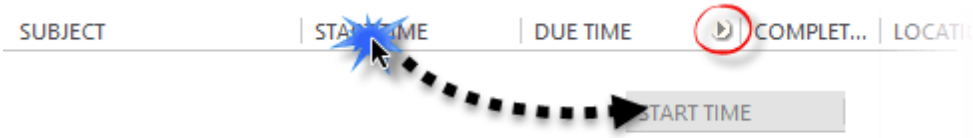


Right-click a column caption to enable/disable columns you want to display/hide.



Selecting a **Customize** option opens a dialog where you can setup what columns to display from all available columns.



If you need to rearrange columns order, then drag fields to a desired position holding on left mouse button. When dragging small arrow icon shows where column is placed after you release mouse button.

Sorting and Searching

To sort tasks, click on any of the column names in the main view. To sort by several fields, click on the column names while holding the Ctrl button on your keyboard.

To search for specific items, use the search field at the top right corner.

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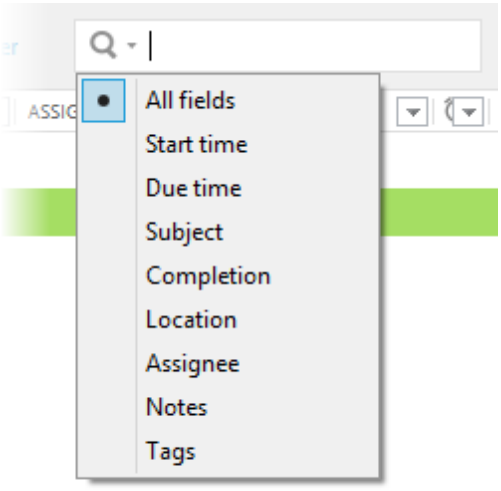
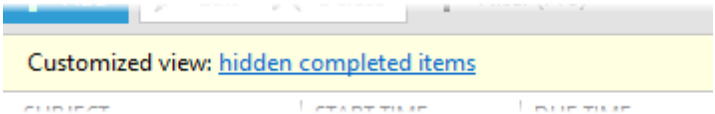


Clicking on the spyglass icon will allow you to choose specific fields to search in.

EssentialPIM allows you to hide completed tasks. This feature can be enabled under View -> Hide Completed. If the "Hide completed" option is enabled, the special **Customized view** line will be shown at the top.



The search field allows you to use the AND / OR operators for more complex queries. Operators have to be written in capital letters.

Note, all the above searching and filtering methods can be combined with each other.

Calculation of Duration

To see duration of a single or several tasks, select the items in the main view and check the status bar at the bottom.

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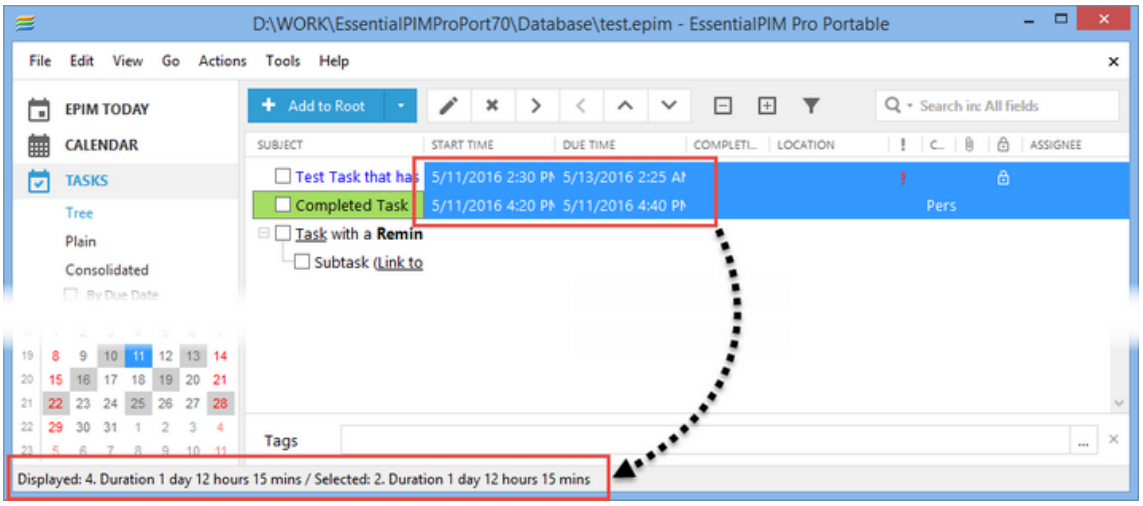
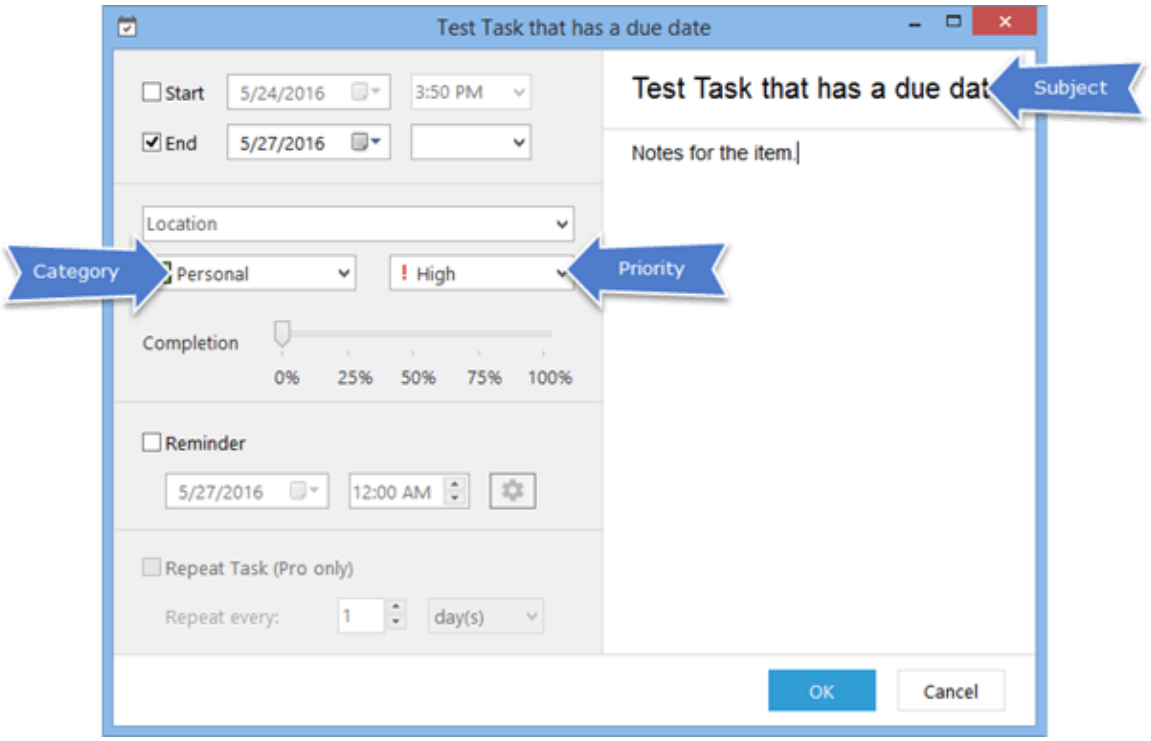


If the status bar is not visible, enable it under **View -> Status Bar.**

4.4.2 Editting a task

Tasks can be edited by double-clicking on them or directly from the main view by single clicking on the field



Subject - a task name.
Location - location for the task. The list of locations will be saved and available for

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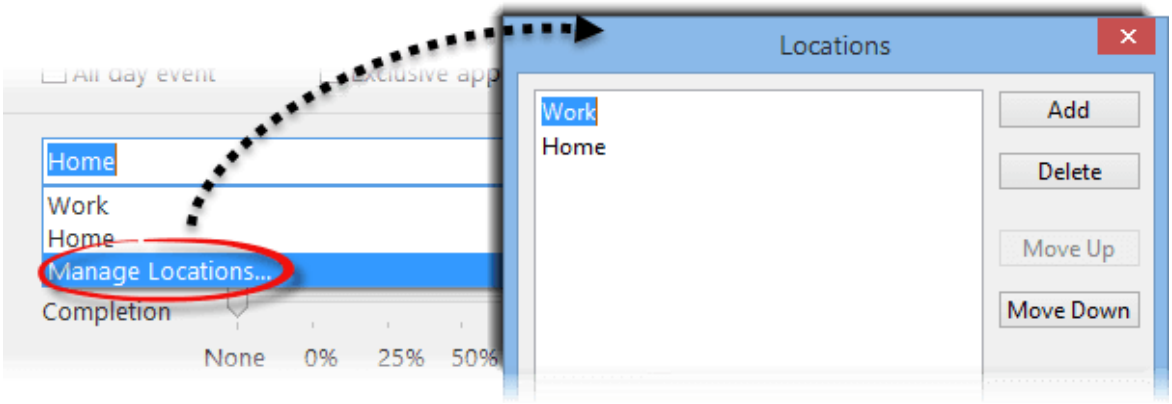
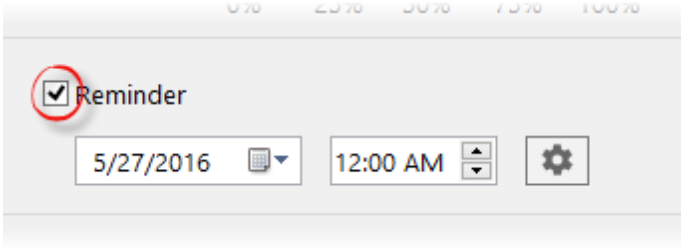
future use from the drop down list. You can add, edit or delete locations using this menu. To do so, click on the **Manage Locations** option at the end of the list.



Start time - sets the start date/time (disable checkbox if you don't need to set time but date only).
End time - sets the end date/time (disable checkbox if you don't need to set time but date only).
Priority - allows you to set a priority.
Completion - sets a rate of completion.
Category - sets a category for a task.

Reminder

Enable reminder by clicking on the **Reminder** checkbox:



Reminders can be set to sound at any date and time.

Additional reminder options are available by clicking on the **Advanced** button:

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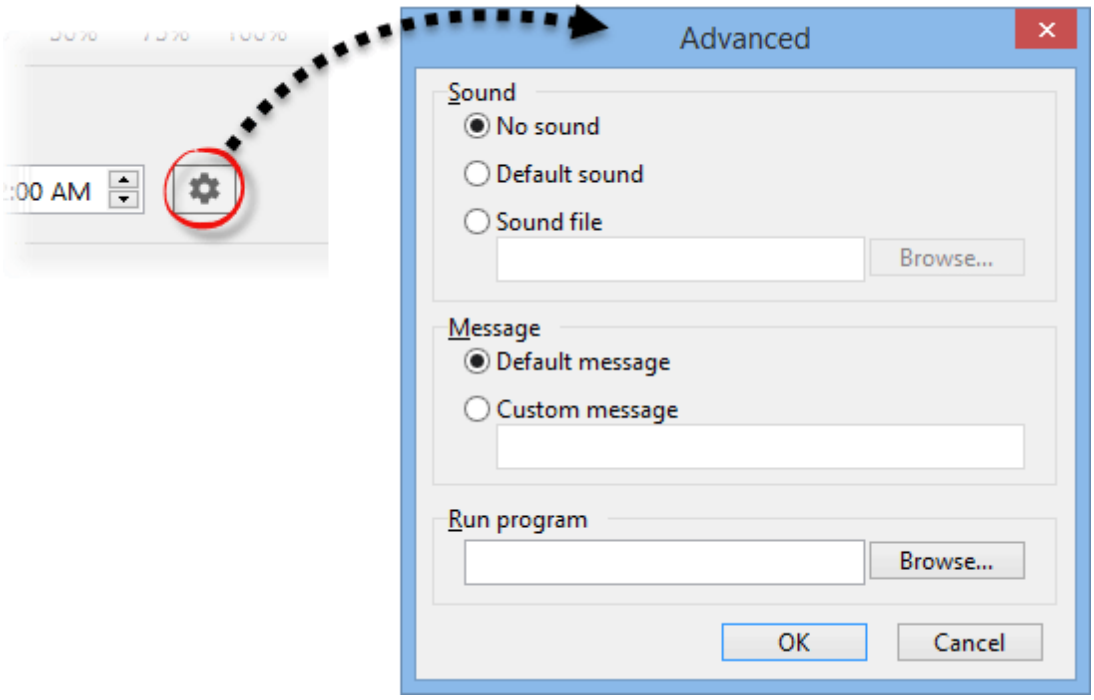


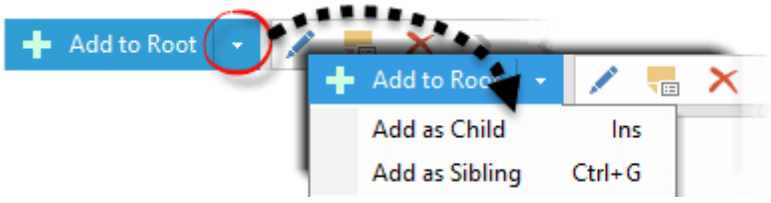
You can assign a custom sound or write your own custom message to be shown when the reminder fires up.
A selected application can also be started once it's time for the alarm.

4.5 Notes

4.5.1 Adding a note

To add a new note, click on the **Add Root** button on the tool panel.

If you need to create a child or sibling note then click on arrow button next to **Add to Root** and select **Add as Child** or **Add as Sibling** option.



Then enter the note name. You can leave the default <Give name automatically> option. In this case EssentialPIM will use the first sentence of your note as its name:

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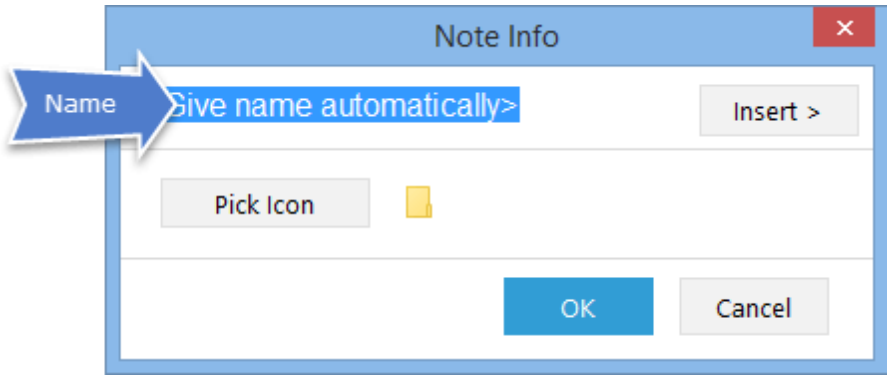

You can insert current date and time into the note name field using the **Insert** button or **Ctrl+D** (Day) and **Ctrl+T** (Time) shortcut keys.

EssentialPIM offers a classic set of text editing tools located on the toolbar.

4.5.2 Notes managing

Notes can be arranged in hierarchical structure. It can be edited using standard drag & drop feature. Notes Notes can be organized into hierarchical structures. Creating child or sibling notes was described earlier, but you can also change existing notes structure. The fastest way is to drag and drop a note to a desired location.

You can also move notes in the tree by using the corresponding buttons from the tool bar.

Arrow buttons move selected note(s) across the tree.

Collapse All and **Expand All** (or "-" and "+") buttons allow to expand or collapse the whole notes tree with just a single click.

If a note has child items, they will be moved along with it to preserve the structure.

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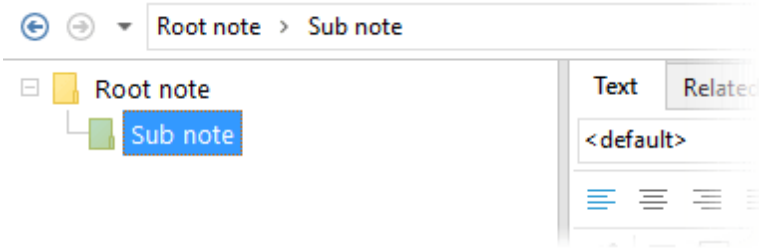
Ins - creates a child note to the selected note.
Ctrl+G - creates a new note on the current level.

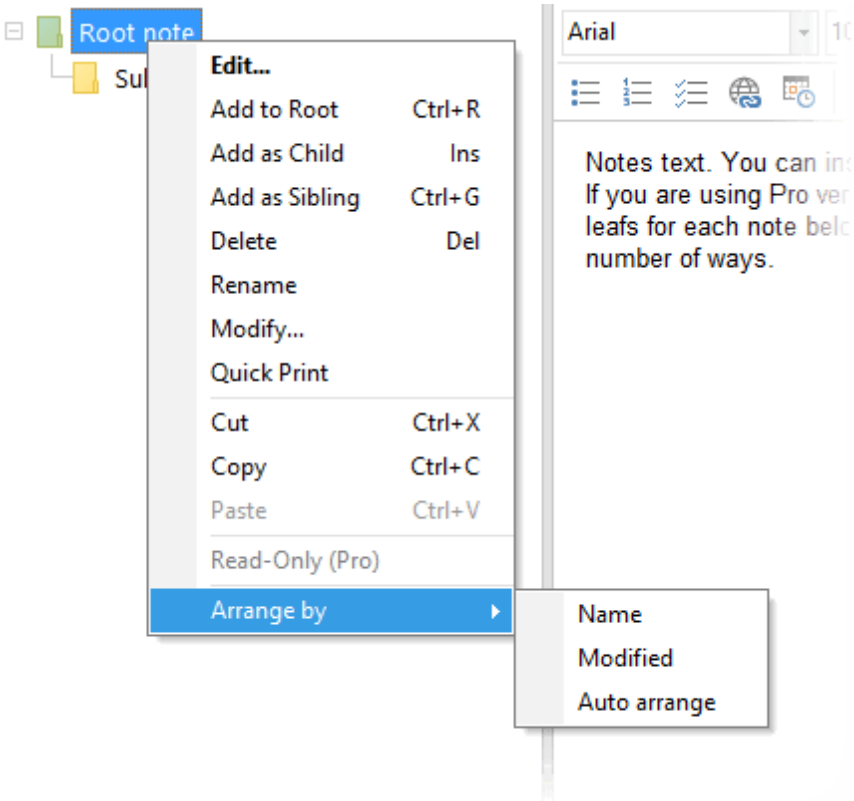
Navigation through Notes list

Notes module represents a navigation pane.



This panel shows a selected note path. Clicking on any note name in the path name switches focus to a corresponding note. Arrow buttons allow switching between the last used notes.

Notes can be also automatically arranged by **Name** or Last **Modified** date:



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4.6 Contacts

4.6.1 Working with contacts

Contacts module is a convenient tool to keep and manage your contacts list.

Adding a Contact

There are several ways of adding a contact. The easiest one is pressing on **Add Contact** button in the tool panel, or under **Actions -> New Contact** from the main menu.

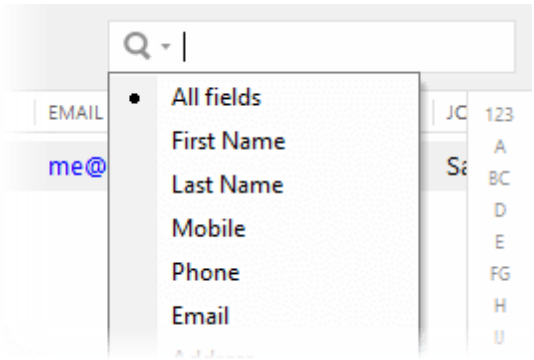
It is also possible to add a contact by double-clicking on an empty space in the main window. More details about editing contacts can be found in the Editing a contact topic.

Ins - add a new contact shortcut
Shift+Ctrl+C - global shortcut to create a new contact (it works even when EssentialPIM is running in the background).
Contact can be also added under **File -> New -> Contact**.

Contacts sorting and searching

EssentialPIM offers a number of tools for fast navigation through the contacts list. You will be able to find necessary record in a few clicks.

The first tool you can use is the search field at the top-right corner.



Clicking on the spyglass icon allows to select a searchable field.

The second tool allows fields sorting. Clicking on any field's name sorts all records in this field. If you need to sort by several fields, hold down the Ctrl button when pressing on fields names.

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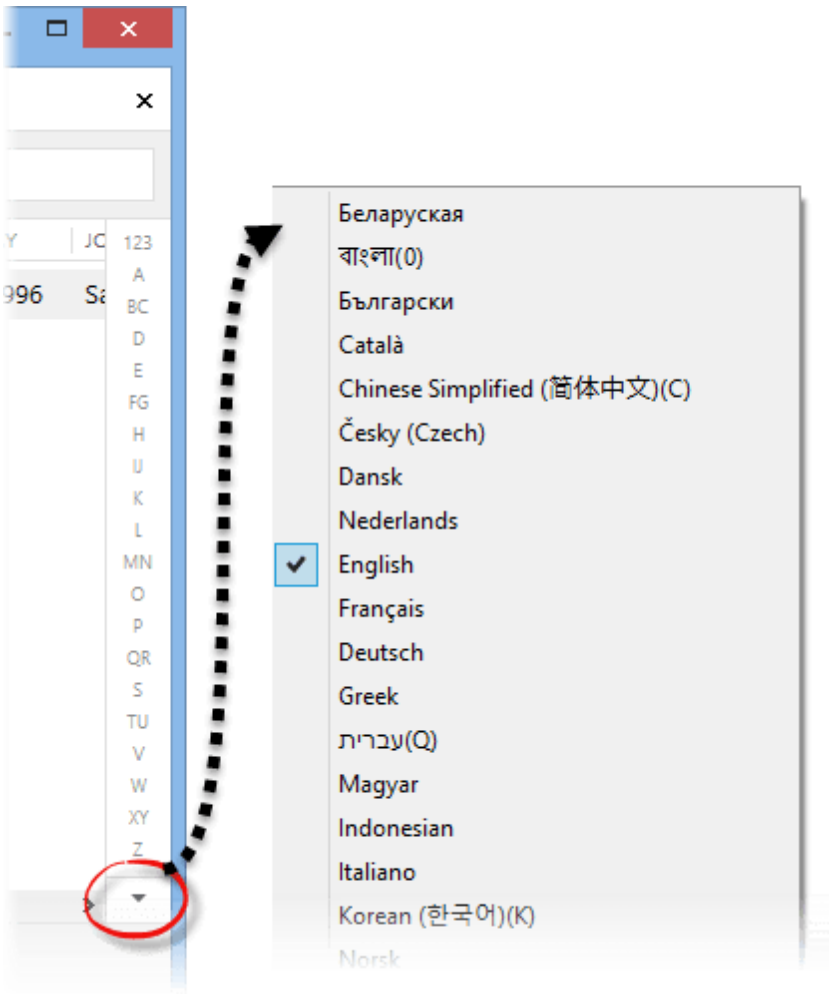
Another useful tool is **Letters bar** located at the right side of the contacts list. It allows to quickly navigate to a specific letter or number in the contacts list.



Letters bar can contain several languages. To add an additional alphabet press on the button at the bottom of the letters bar and enable necessary languages.

Letters bar can be enabled or disabled under **View -> Letters Bar**.

Note, all described tools can be uses simultaneously and complement each other.

4.6.2 Editing a contact

There are several ways of editing a contact. The fastest way is editing directly from the table cells - select a contact and long click a field you wish to edit, it will make it editable. The set of fields you see in the main view can easily be adjusted. Right-click

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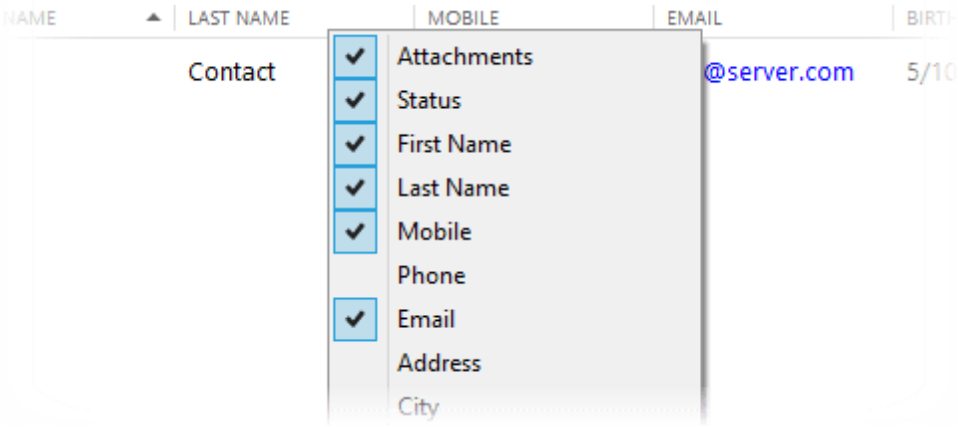
on any of the fields name to enable/disable fields you need.



To change the order of the fields, drag and drop them into desired positions.

Contact Views

To get access to all contacts fields, open the **Contact Info** dialog. Double click the contact or select it and click the **Edit** button on the tool bar.

There are two main contact views. One show contacts fields in categorized groups and can be found under the **Contact** tab. Second view is more compact and lists all fields in one table, it can be found under the **All Fields** tab. Overview of the tabs can be found below.

Contacts tab (default):

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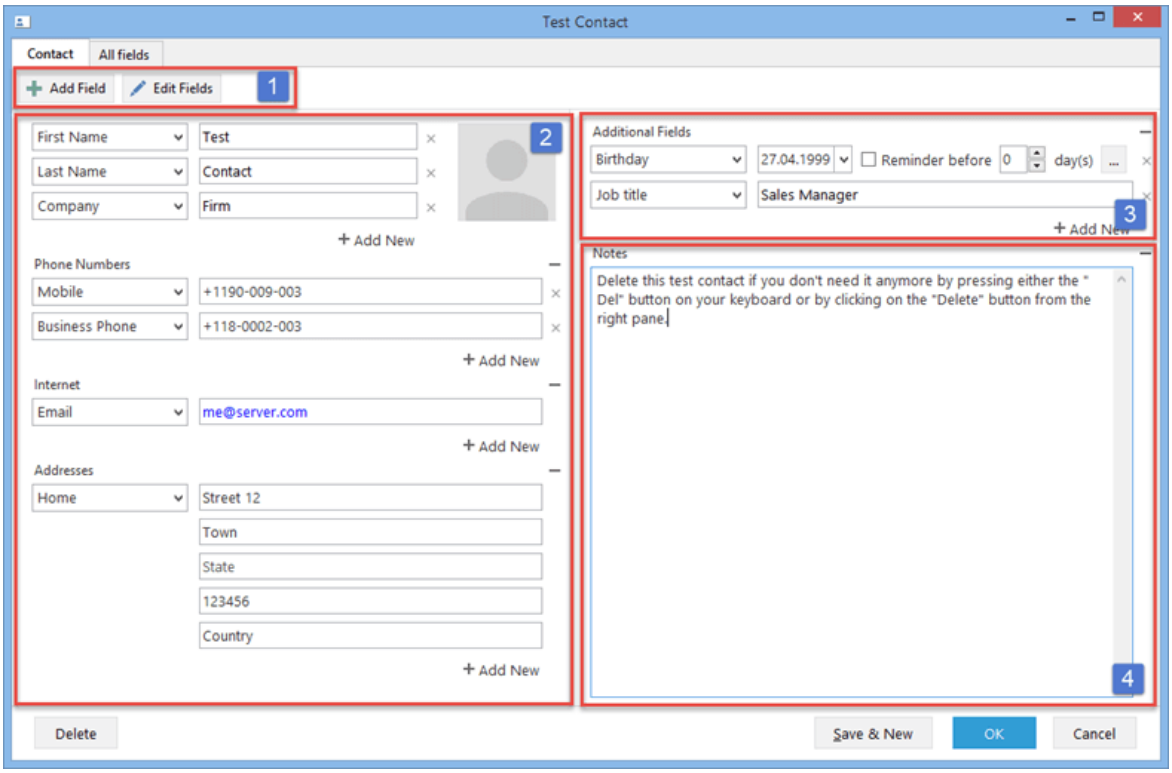

1. Field management tools, allow to edit fields layout of all contacts.
2. The main info area, it constrains name, picture and all kind of contacting info.
3. Additional info area, it can contain various data types like anniversaries or any other custom created fields.
4. Notes area represents a simple text editor, here you can add necessary notes.

All fields tab:

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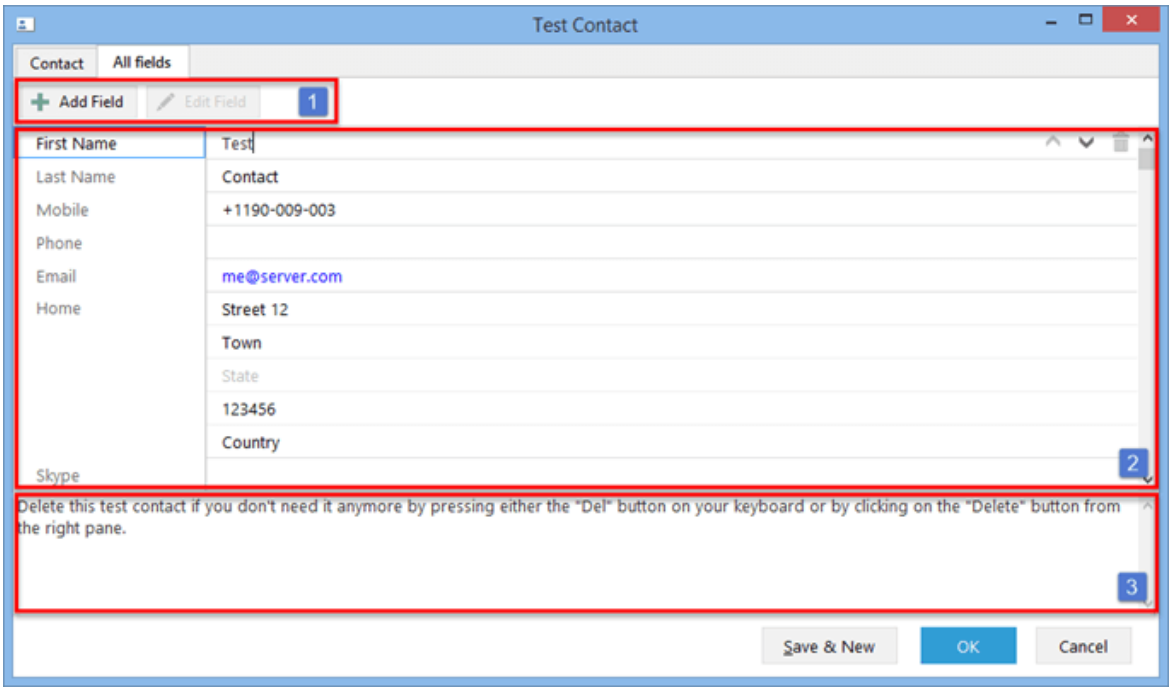
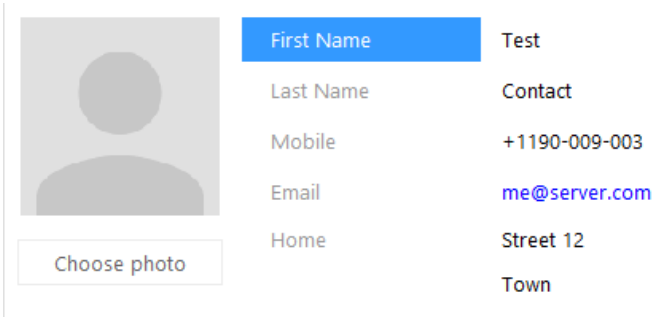


1. Field management tools, allow to edit fields layout of all contacts.
2. Contact info area, consisting of all fields including default ones like name, phone, address and etc, as well as custom user defined fields.
3. Notes area represents a simple text editor, here you can add necessary notes.

All the contacts fields are also shown at the bottom of the main view. These tabs also allow data editing.



This pane aggregates information from all contact fields.

Custom fields

Most of the contact fields can be edited. To edit or add a new field, open any contact and use buttons at the right hand part of the dialog.

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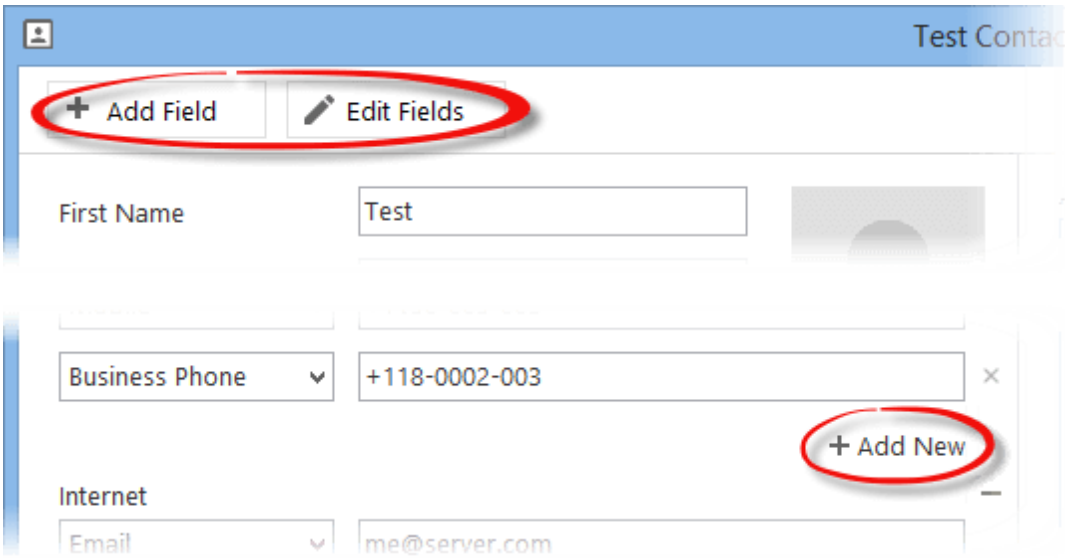

Add Field - creates a new field.
Add New - add a field of the same type as other fields in the section.
Edit Field - allows to edit or delete any of existing fields.

Contact fields can contain different types of data represented below. You can choose data type for a field when creating a new field or editing an existing one.

Text - could contain any text or number info.
Phone number - for storing phone numbers, can be used for dialing.
Address - field for storing addresses.

Date - stores dates. You can use this field to create annual events in Calendar like birthdays, holidays, anniversaries and etc.

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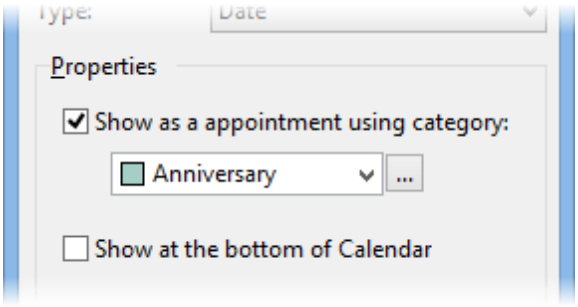

Show as appointment using category - automatically creates an event in **Calendar**. You can assign a certain category for the event.
Show at the bottom of Calendar - adds a notification at the bottom of Calendar 3 days prior event.

Note, all changes made in the fields structure are applied to all contacts.

First Name and Last Name fields cannot be deleted. These are key fields that are also used in synchronizations.

4.7 Mail

4.7.1 Creating an account

EssentialPIM offers a full scale Mail module with classic features set like support of IMAP and POP3 protocols, message rules and unlimited mail accounts.

Adding a mail account

Before you start working with mail you should create at least one mail account. There are several ways of doing this. Mail account can be added under **File -> New -> Mail Account** menu or in the Mail module under **Tools -> Account Settings -> Add**. In both cases a wizard starts which will guide you through the whole process.

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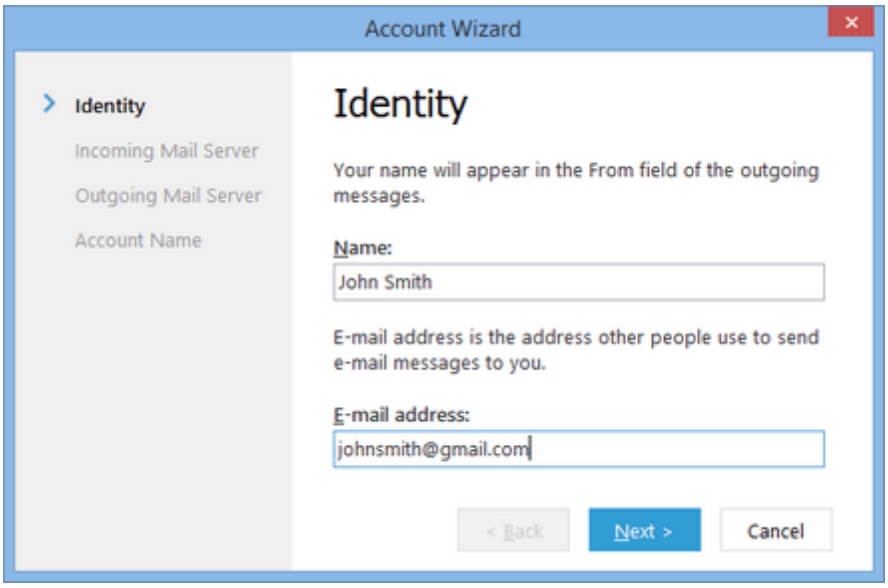
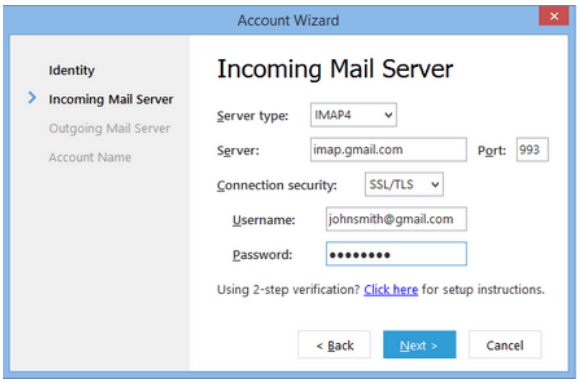
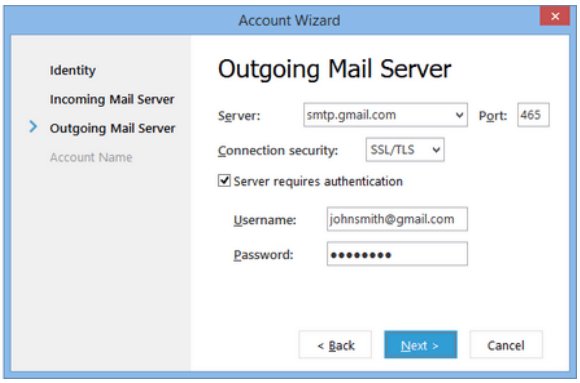
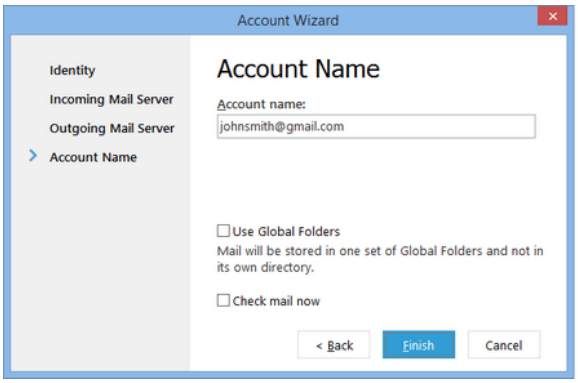


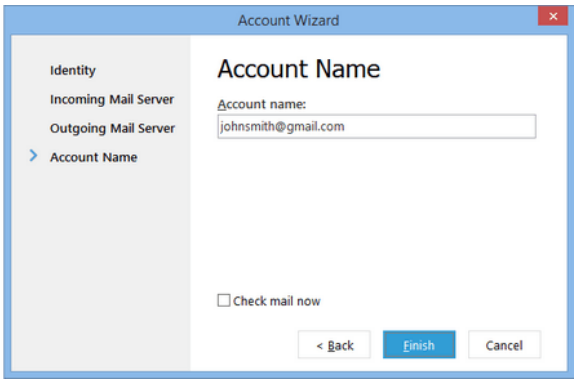
Name and email address fields you fill in during this step will be seen by a recipient in the **From** field of incoming mail. Click on the **Next** button.





Enter incoming and outgoing mail servers settings. EssentialPIM supports IMAP4 and POP3 server types for incoming mail. If you are not sure which type to choose, please refer to your mail provider. Server settings are usually covered in the frequently asked questions (FAQ) section.





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If you create a POP3 account, the last step offers to use the Global folders (left picture) feature. In this case all mail accounts share and use the common set of folders. This feature is not available for IMAP4 accounts (right picture).

Note, the account type (POP3 or IMAP4) can only be set once, when creating a new account. It's not possible to change the account type later, for already existing accounts.

Global Folders feature can be enabled when creating a new account only. It's not possible to enable or disable it for already existing accounts.

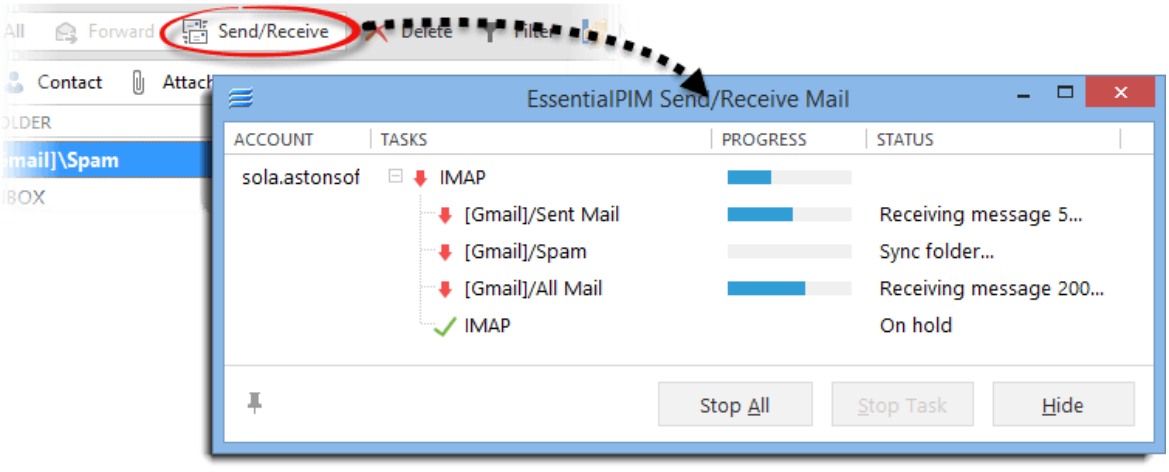
Mail account settings can always be accessed and edited in **Tools -> Account settings -> Edit**

4.7.2 Working with mail

Once mail accounts are created, you can start working with mail.

Receiving mail

The easiest way to start receiving mail is to click on the **Send/Receive** button. If you need to receive mail from a particular account only, navigate to **Tools -> Receive** and select the desired one.



If something goes wrong during the process, there will be an error message shown in the dialog window.

If you need to stop send/receive mail processes, click on the **Stop All** button or select a single account and click on the **Stop Task** button.

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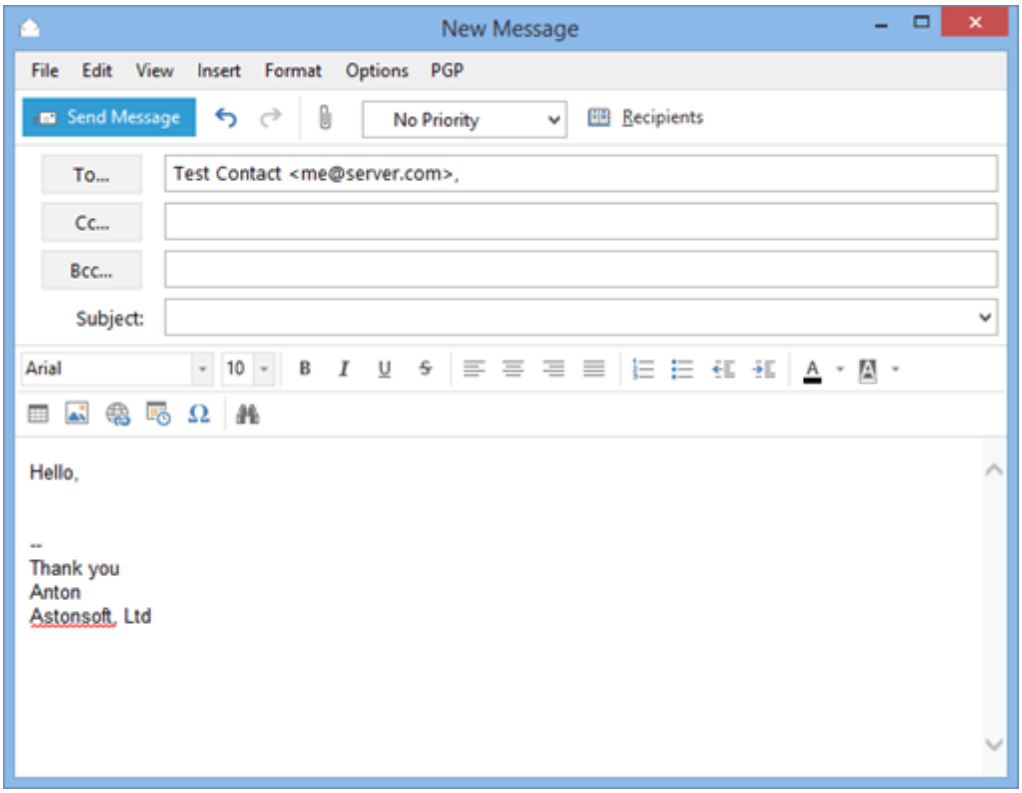
Ctrl+Alt+A - send and receive all mail.
Ctrl+Alt+R - receive all mail

Creating and sending mail

- To create a new message, click on the **New Message** button on the Actions panel or navigate to **Actions -> New Message**.
- To reply to a message, click on **Reply** or **Reply All**. When Reply All is used, each message recipient will be included in the **Cc** (carbon copy) field.
- To forward a message to another person, click on the **Forward** button.



You can send mail in Rich text format (HTML) or in plain text. To switch between formats, click on the **Format** menu.

From field includes all identities from all mail accounts. Changing the sender automatically changes associated signature in the message.
Click on **To**, **Cc** and **Bcc** buttons opens up a Select Recipients dialog window.

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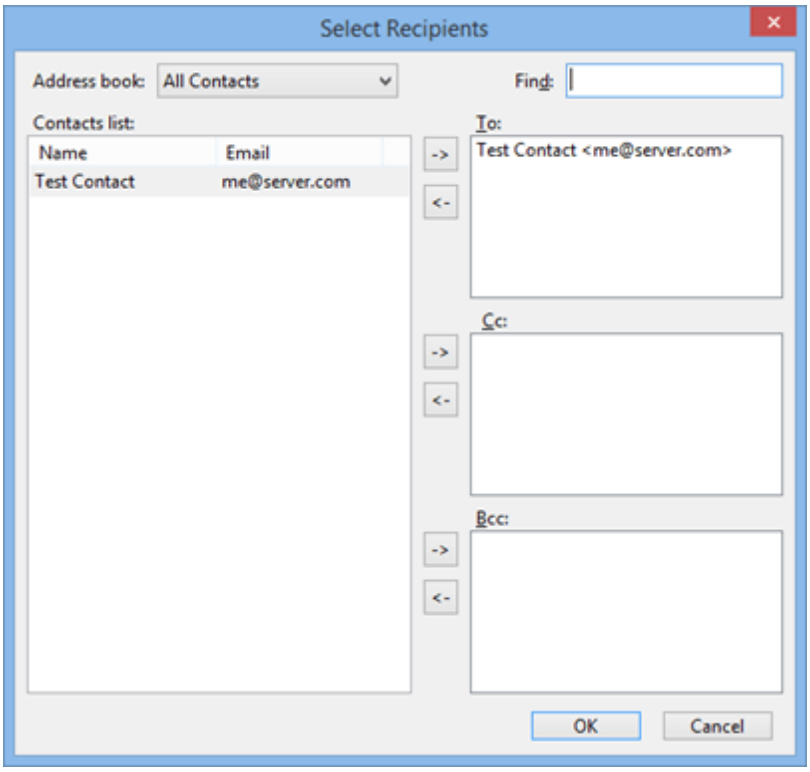

The left part of the window shows the list of all contacts in your database. The arrows in the middle allow to add selected contacts into different fields (To, Cc, Bcc) of a mail message. To filter contacts, use the **Address book** drop down list (allows to filter by contact groups) or **Find** field.

The Attachments tab in the message window allows adding attachments to messages.

Once the message is ready, you can send it immediately by clicking on the Send button. If the message is not ready, you can temporarily save it for later by clicking on **File -> Save** (within message edit window) or just closing the window (EssentialPIM will ask whether to save it for later use). Messages will be saved in the **Drafts** folder.

Ten latest email subjects will be saved in the database so that you can re-use them later. You can select previously used saved subjects from the drop-down list.

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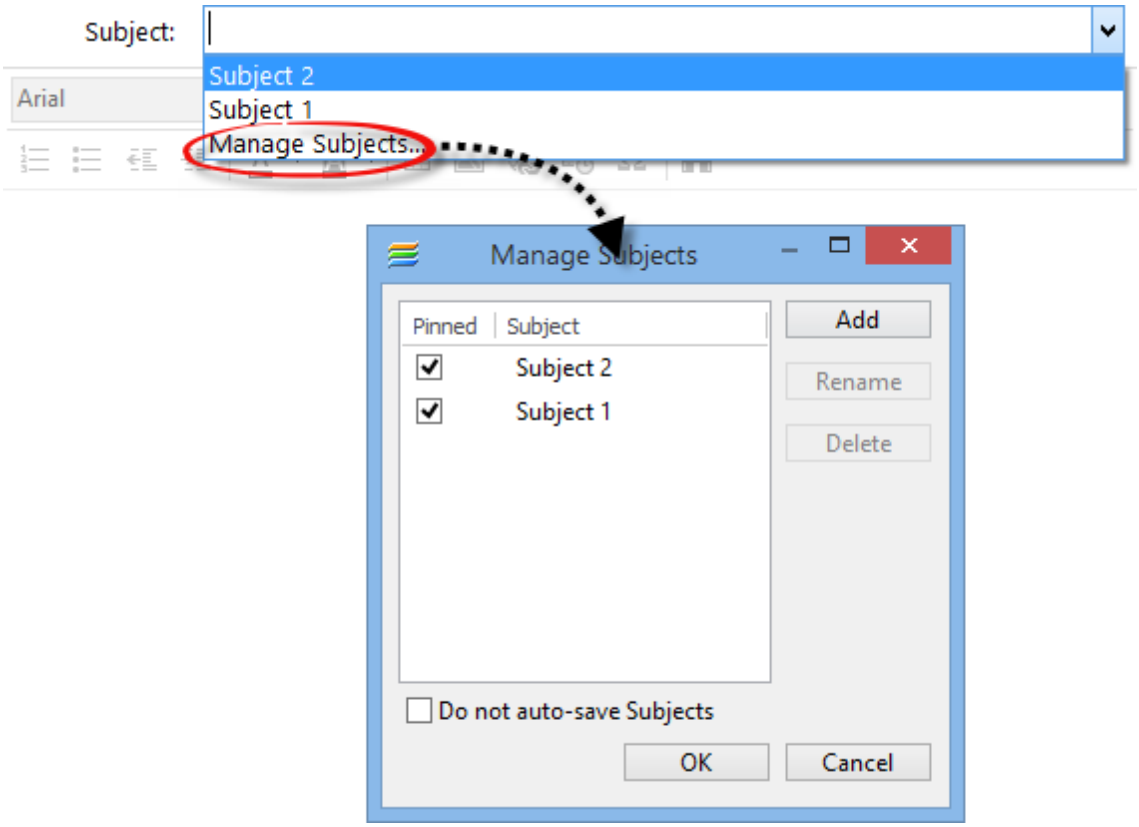
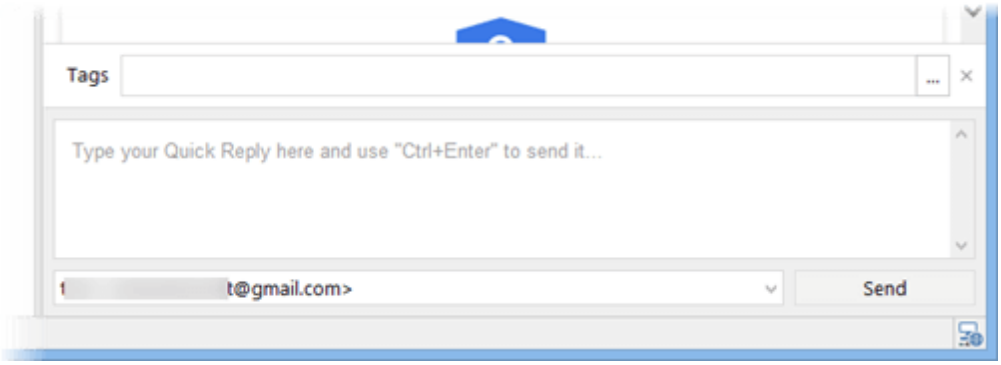


To edit or pin saved subjects, select the **Manage Subjects** option. This will open up a dialog window where you can do all that.

If the **Do not auto-save Subjects** option is enabled, EsentialPIM will not save entered subjects automatically anymore.

Quick Reply

Alternative way for quickly sending replies to email messages.



Works the same way as if you were using a regular reply option only without a separate dialog window. Your signature will be automatically added and the original message will be quoted in the outgoing messages. To hide the Quick Reply section,

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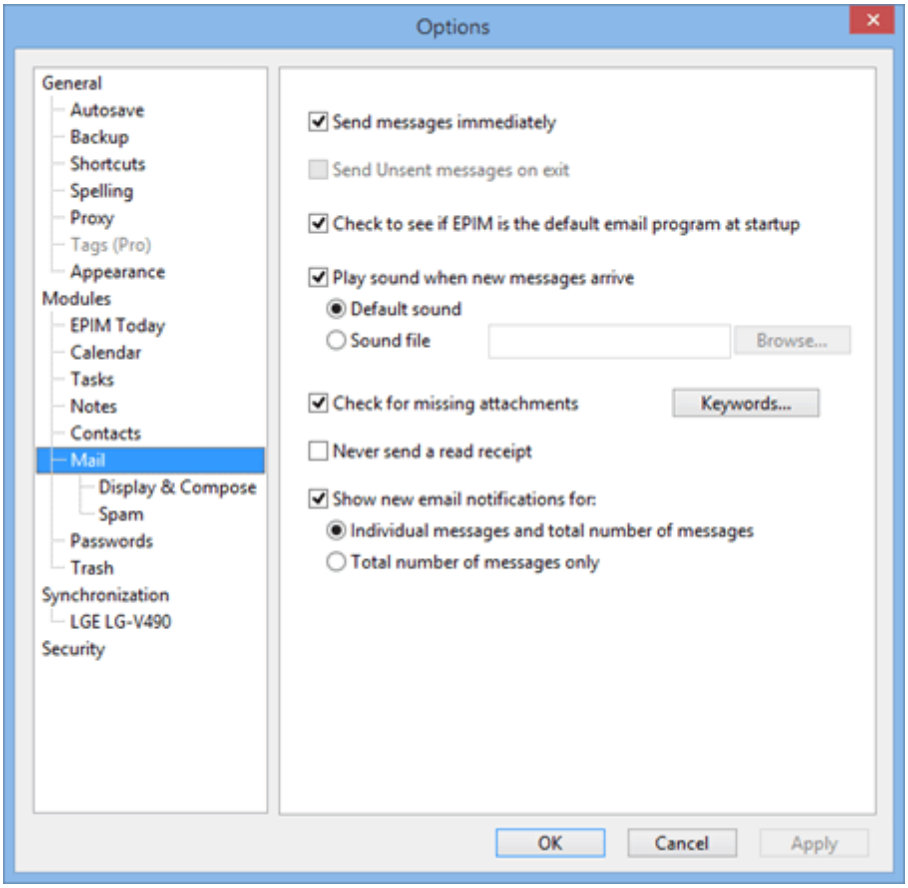
click on **View->Quick Reply Box**.

You can add a read receipt request to a message under **Options -> Read Receipt Request**.

Ctrl+M - send a message.
Ctrl+S - save to Drafts.

Mail settings

Common mail settings are available under **Tools -> Options -> Mail**.



Send messages immediately - when enabled, click on the **Send** button, sends out a message immediately. When disabled, message goes to the **Outbox** folder first and waits till you send it out later manually.
Check to see if EPIM is the default email program at startup - enable it if you wish EssentialPIM to be the default email client in the system.
Check for missing attachments - reminds you to add an attachment upon clicking on the Send button if a keyword is mentioned in the message text. Pressing the **Keywords** button allows you to edit the list of keywords.

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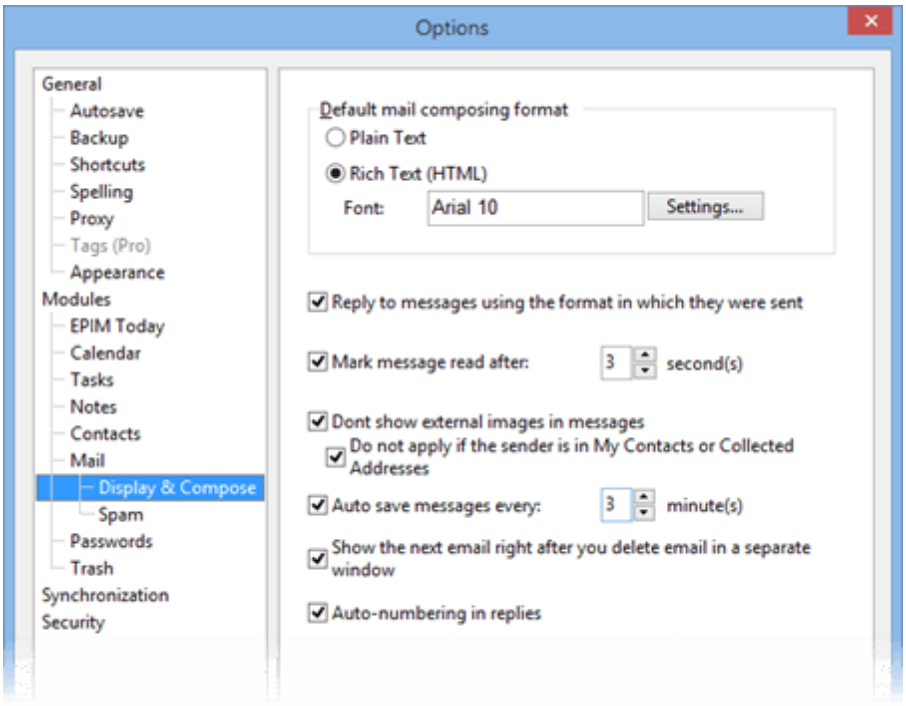
Display & Compose provides some additional options to tune up your work flow.



Auto save message every... - automatically saves messages that are being edited every specified number of minutes. Messages will be saved into Drafts folder.
Auto-numbering in replies - adds sequential number into subject each time you reply to a message, making it easier to track your email correspondence.

Portable version of EssentialPIM cannot be set as a default client in the system.

4.7.3 Views, sort, filter, search

Mail Views

There are three email messages views in the program: Classic (horizontal), Vertical and Wide view (as a variation of classic one).

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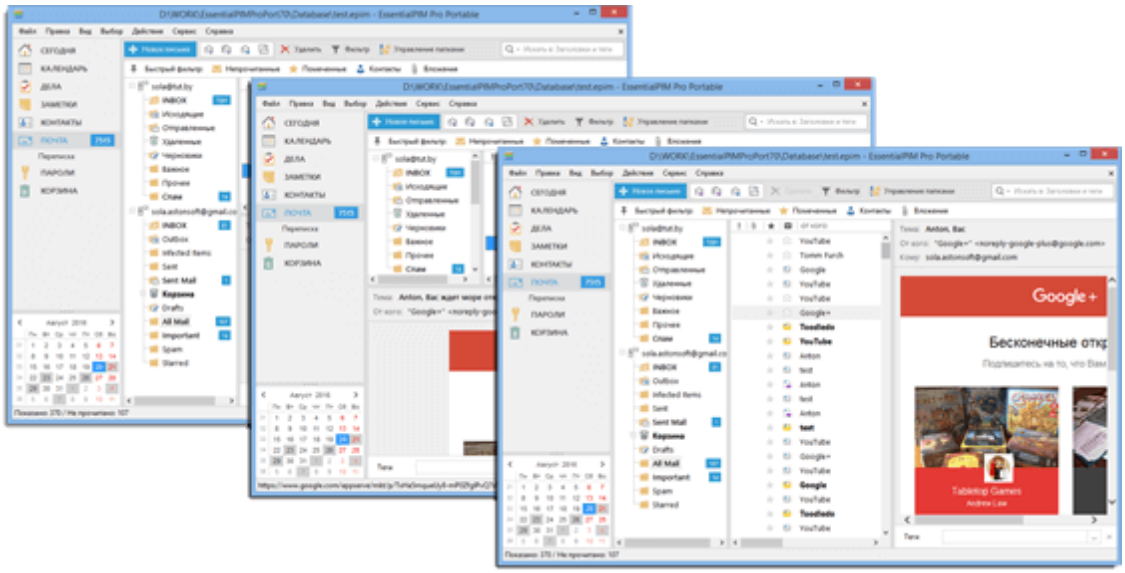
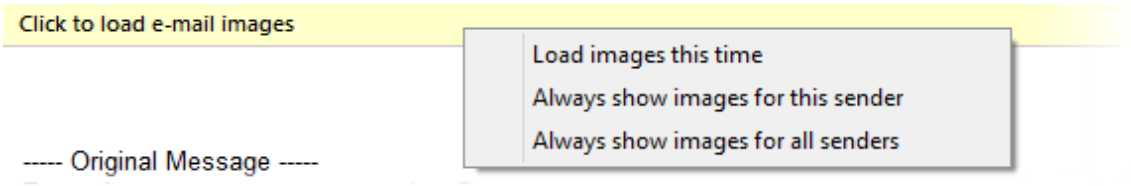


You can change a view in **View -> Layout** menu.

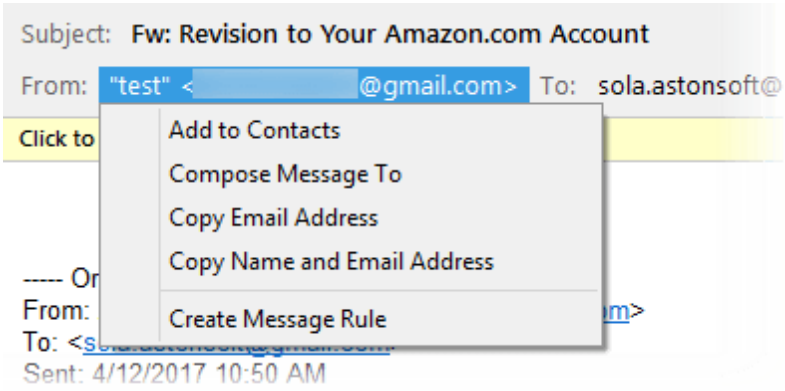
Images in the preview

By default settings images from the Internet will not be downloaded and shown in the message preview window for security reasons.



To load images or to change this setting, click on the yellow line at the top of a message.

Actions with To/From addresses



Click on any email address in the message header will show up an extended menu

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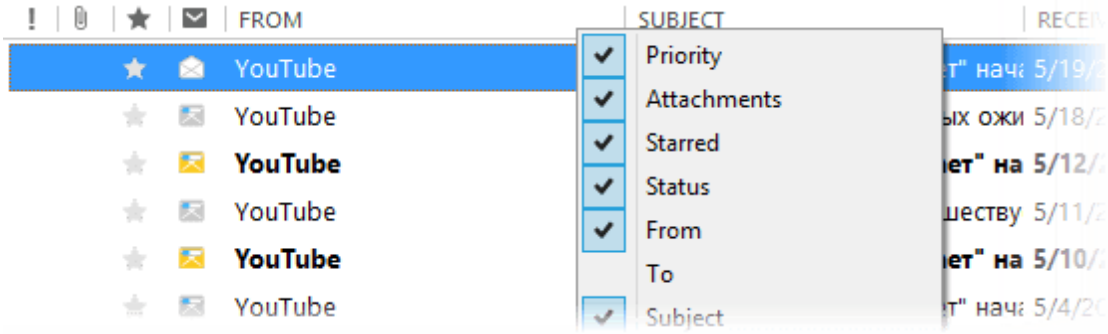
with options to copy, add to address book, compose email or create a message rule for the selected email address.

View Customization

EssentialPIM Pro allows customization of columns set and their order in the main view.



Right-click a column caption to enable/disable columns you want to display/hide.

If you need to rearrange columns order, then drag fields to a desired position holding on left mouse button. When dragging small arrow icon shows where column is placed after you release mouse button.

If you need to copy current columns set from an active folder to another one, right-click columns caption and select the **Apply columns to** menu option.

Sorting and Filtering

To sort mails, click on any of the column names in the mail list. To sort by several fields, click on the column names holding the Ctrl button on your keyboard.

To search for specific mails, use the search field at the top right corner.

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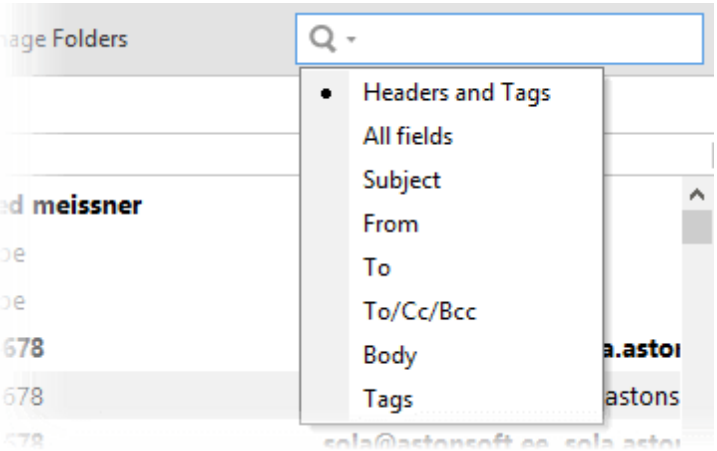
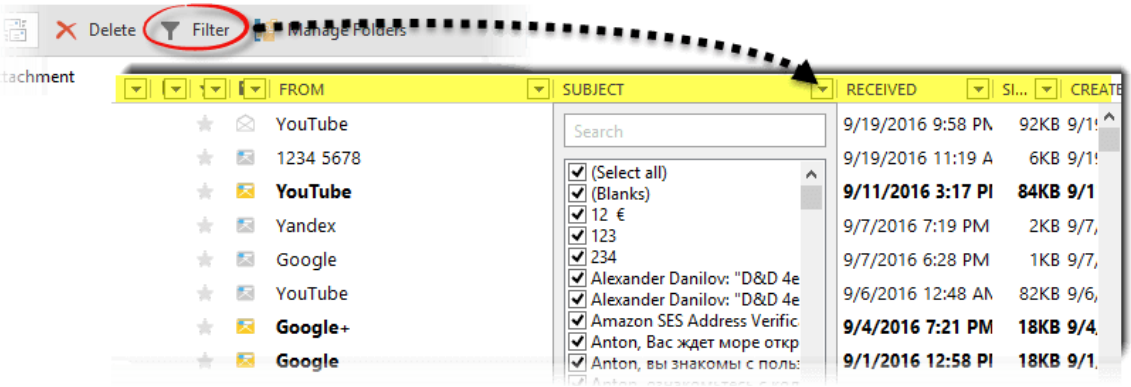


Clicking on the spyglass icon will allow you to choose the specific fields to search in.

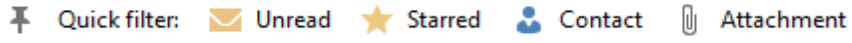
The search field allows you to use the AND / OR operators for more complex queries. Operators have to be written in capital letters.

EssentialPIM offers advanced filtering of mails. Click on the **Filter** button on the **Actions** pane to enable this option for every mail column.



Each dropdown list shows all possible values for the given field. You can choose necessary values in multiple columns for more advanced filtering.

EssentialPIM Pro also offers a quick filter panel.



It allows you to display only unread or starred mails, messages with attachments or messages from people in your contacts list.

If a filter is applied, the special **Customized view** line will be shown at the top. You can quickly clear all the filters by clicking on the "filtered items" link and choosing the Clear option.

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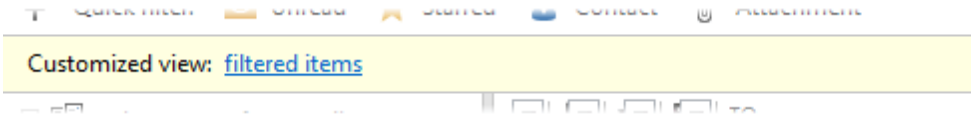
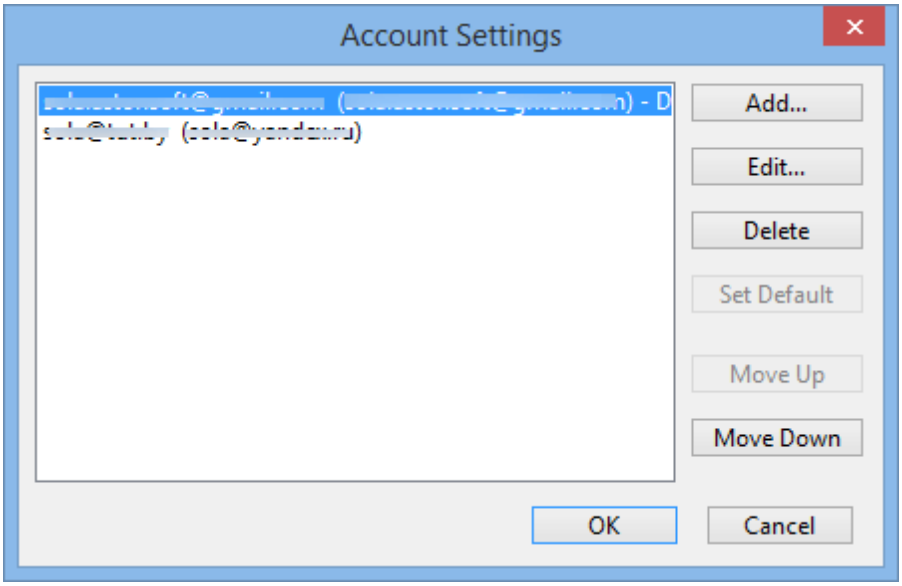


Note, all of the above searching and filtering methods can be combined and can compliment each other.

4.7.4 Account settings

Account settings are available from **Tools -> Account Settings** menu.



This dialog show the list of existing mail accounts and provides tools to manage them:

Add - runs the wizard that helps to create a new account.
Edit - edit accounts settings here. More details about this option are listed below.
Delete - deletes an account and all its messages.
Set Default - allows to set which account will be used by default to create messages when email client is called outside the Mail module. Foe example, when clicking on the email address in Contacts module or in a web browser.
Move Up/Down - changes the accounts order in the main view.

Clicking on the **Edit** button opens up the **Account Settings** dialog wind.

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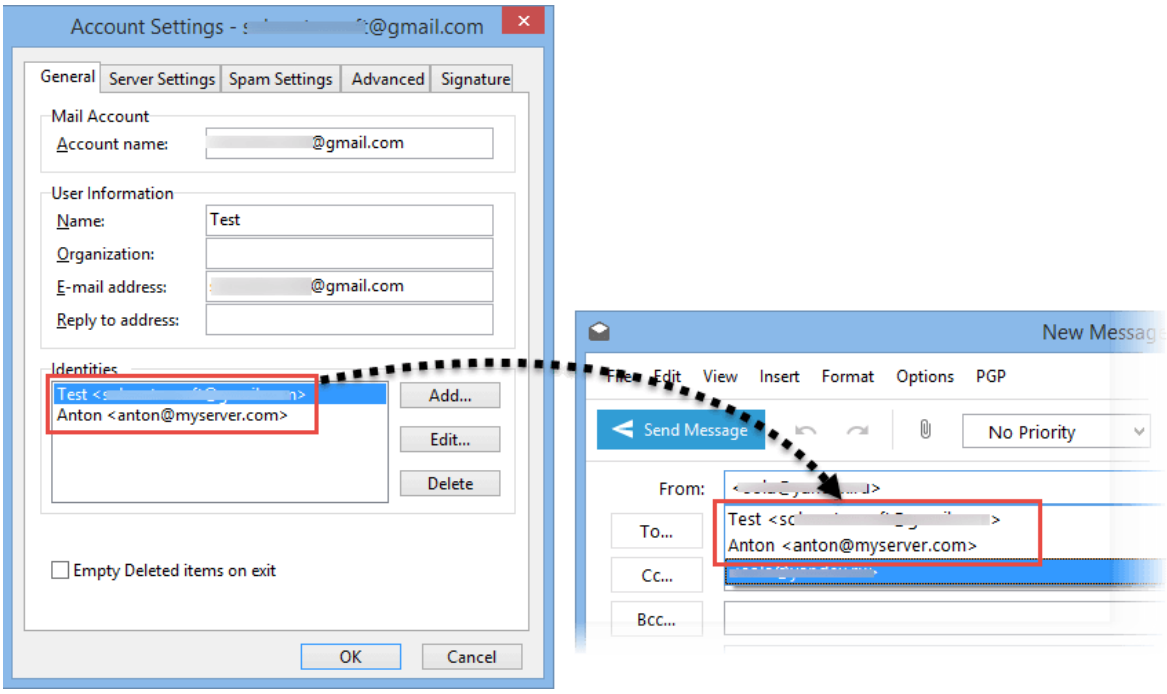

General tab consists of account and sender data. User information entered here will be seen by recipients in the From field of incoming mail. Each account can hold several **Identity** sets. **Identities** allow to include additional sender data and signature. Identities will be seen in the sender's drop-down list when composing new mail.

Clicking on the **Edit** button opens up the **Identity** management dialog window.

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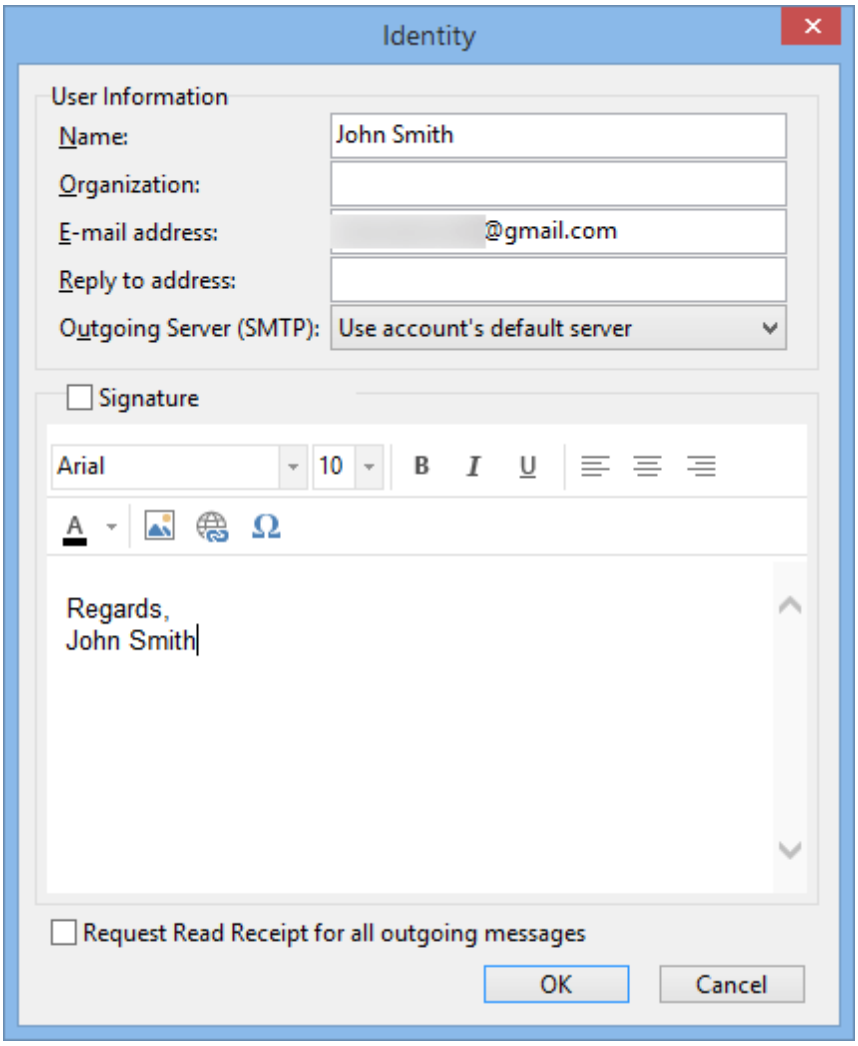

Here you can enter additional info that will be seen by the recipients and enable the **Request Read Receipt** option to be used with the identity.
Outgoing Server drop down list allows you to individually choose an SMTP server to be used with a particular identity.

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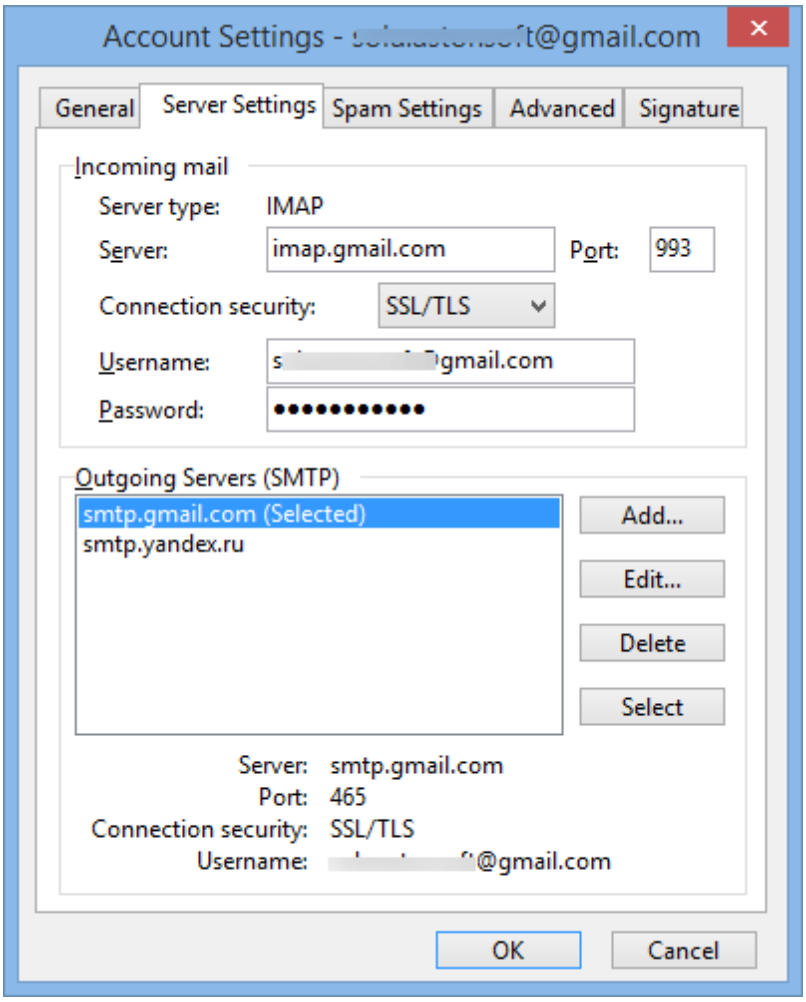

Server Settings tab consists of servers addresses and login info for incoming and outgoing mail. Refer to your mail provider help area (FAQs) section or system administrator if you are not sure what to enter here.

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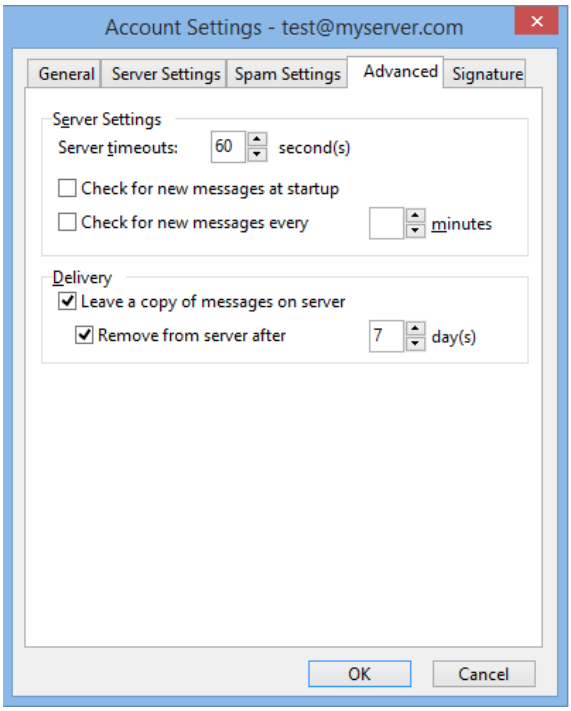

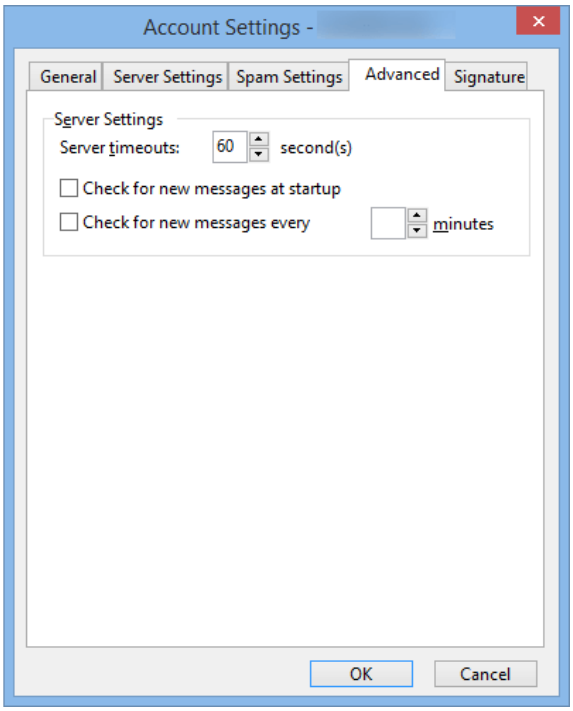

Advanced tab allows to set additional options for interaction with the mail server. Settings are a bit different for POP3 (left picture) and IMAP4 (right picture) accounts due to differences in the protocols.

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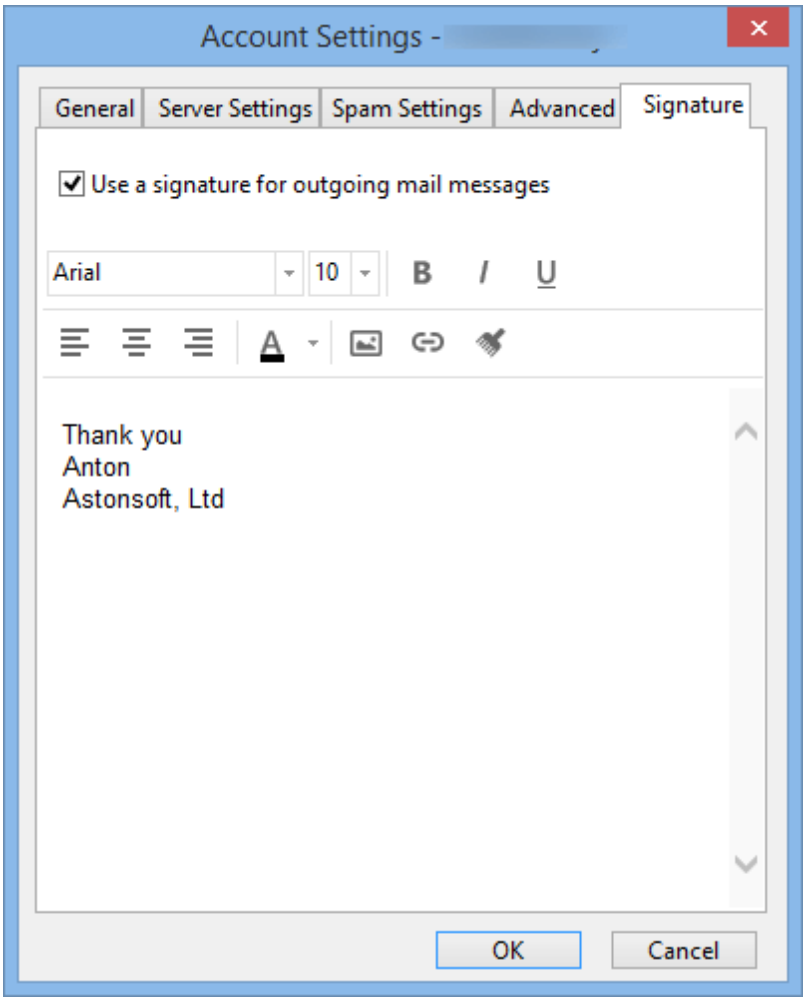

Signature tab allows to compose your signature for outgoing messages. Each account and identity can have its own signature.

4.7.5 Message rules

EssentialPIM allows to sort incoming and outgoing mail automatically by using **Message rules**. Click on the **Tools** menu and select **Message Rules** option. This will open up a dialog that allows to **Add**, **Delete** or **Edit** rules.

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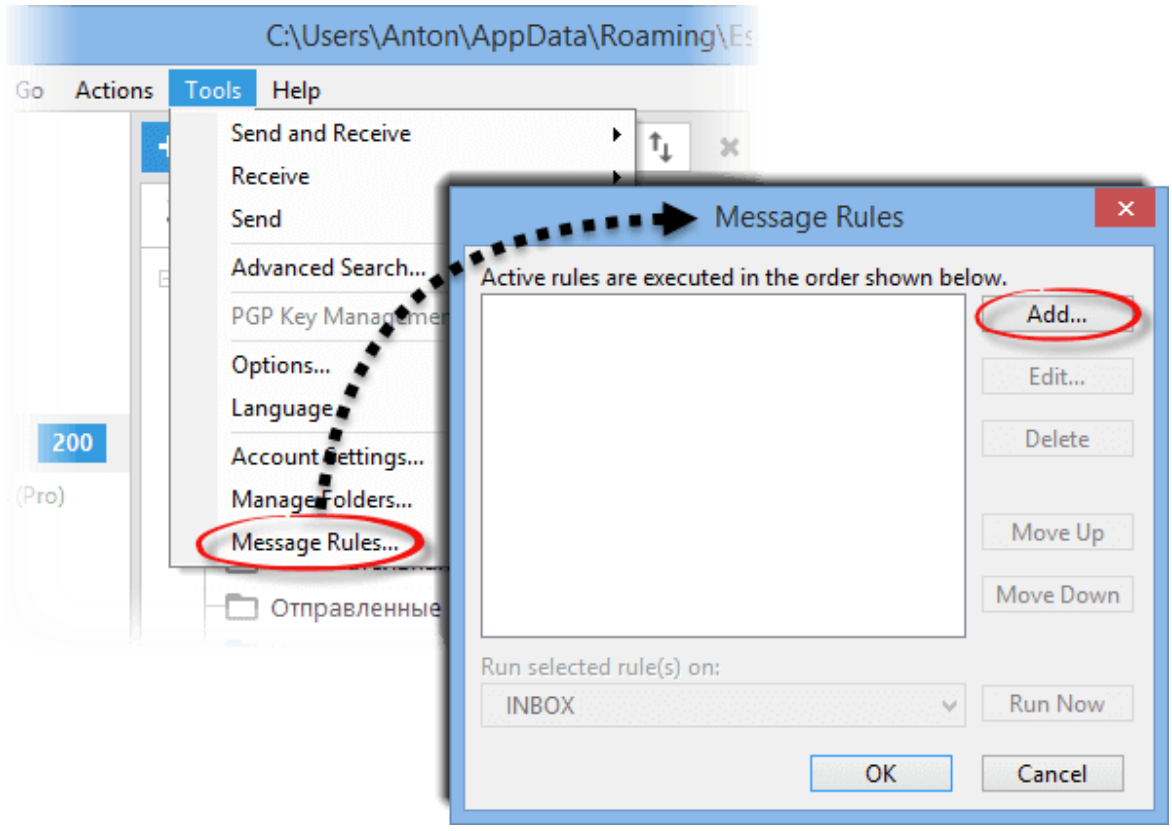
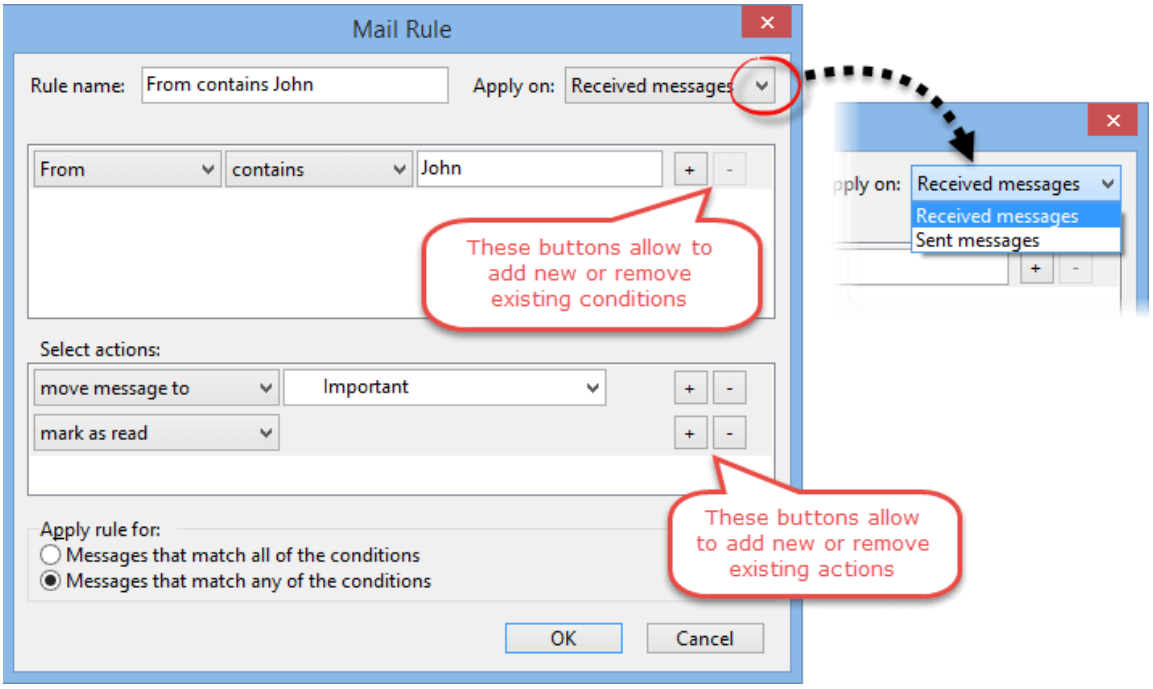


Press the **Add** button to create a new rule. This will open up the **Mail Rule** dialog window.



You may add or remove conditions by using the **+/-** buttons. Actions allow to choose

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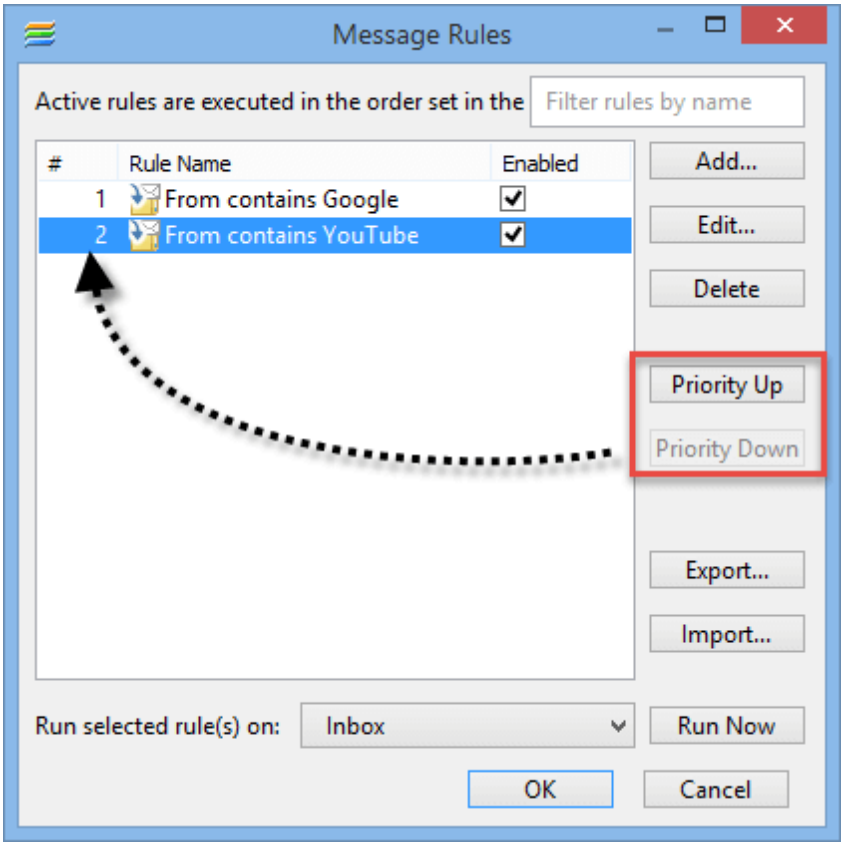
what to do with a message if the condition is met. The given rule example will move messages to folder "Important" and mark them Read if From field will contain text "John". The rule can either be applied to Received or Sent messages via the **Apply on** dropdown list.



The message rules dialog window provides a number of tools to help you manage your set of rules:

- Disable or enable any message rule by clicking on the checkbox next to a rule's name.
- Rules are executed in order specified by the numbers from the **#** column. You can change the rule's priority by using **Priority Up/Down** buttons.
- Sort the message rules by clicking on the column headers.
- **Run selected rule(s) on** option allows you to immediately execute the selected rule on a specific folder.

The Export/Import buttons allow you to save and load set of mail rules (might be used as for backup as for transferring into another EPIM database purposes).

4.7.6 Spam filtering

EssentialPIM Pro features an adaptive spam filtering tool. It learns ways to detect

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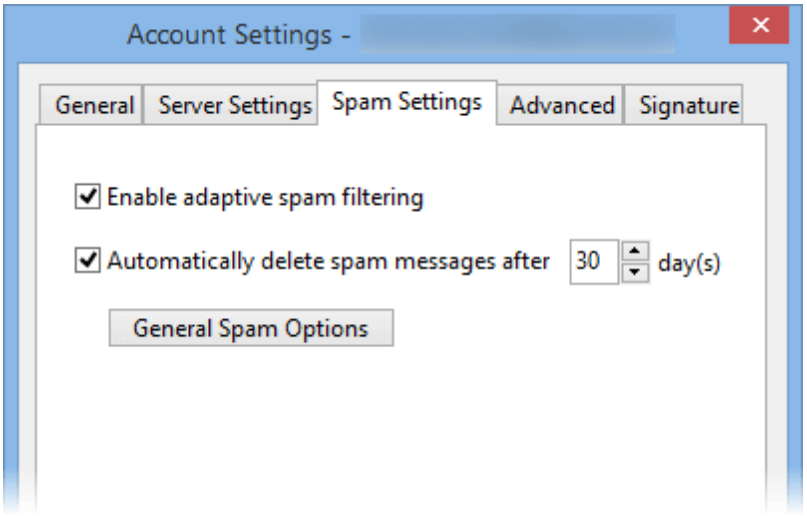
spam from you actions.

In order for the tool to be effective, you must train it first by manually marking spam messages using the **Mark as Spam** button. It's equally important to mark falsely detected spam messages as not spam using the **Mark as Not Spam** button, which appears on the toolbar when you switch to the Spam folder. The bigger the number of messages you mark, the better the adaptive filter becomes with time.

The spam filter is enabled by default but can be turned off individually for each of your mail accounts via the **Spam Settings** tab in Account settings.



For additional tuning you can proceed to the general spam options. Click on the **General Spam Options** button under spam settings tab or navigate to **Tools -> Options -> Spam**.

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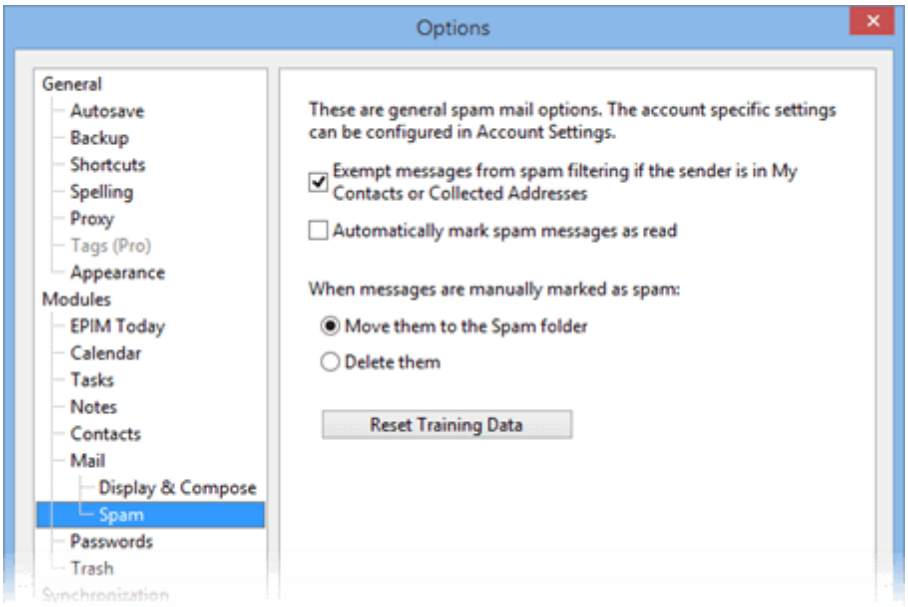
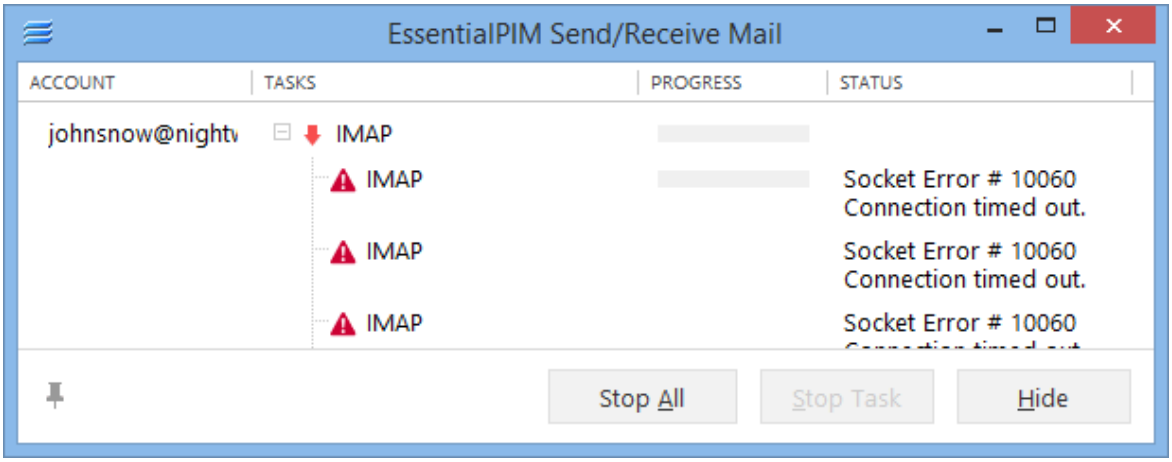


This dialog allows you to adjust general spam settings applied to all mail accounts with the spam filtering option enabled.

4.7.7 Troubleshooting

1. Socket Error



This error appears when EssentialPIM cannot connect with the mail server. The most common reason is incorrectly entered address for incoming or outgoing server. In some rare cases EssentialPIM is blocked by a firewall.

How to fix:
1. Open the servers settings tab under **Tools -> Account Settings -> Edit** and enter correct the settings. If you are not sure which settings to enter, please refer to your mail provider. Server settings are usually covered in the frequently asked questions (FAQ) section.

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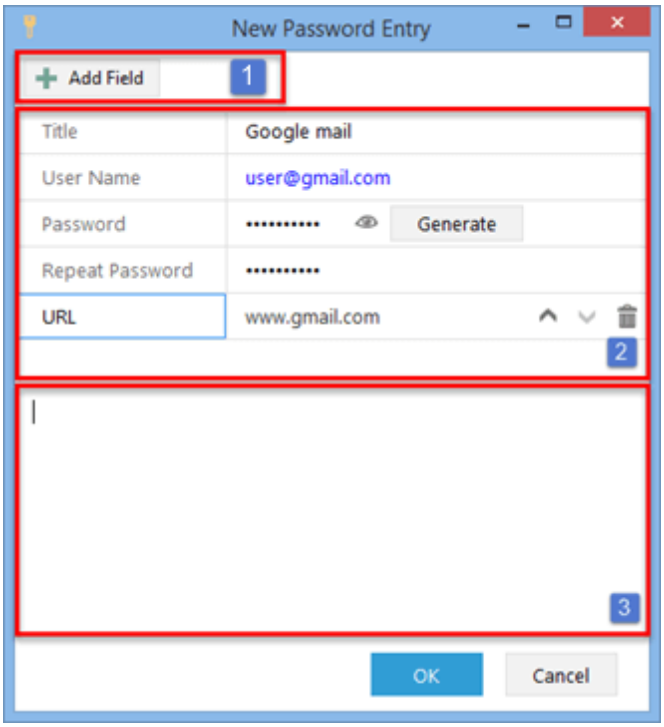
2. Add EssentialPIM to exceptions under your firewall settings.

4.8 Passwords

4.8.1 Working with passwords

Passwords module helps to manage password/login data for various services. To add a new record press **Add Entry** button or go to **File -> New -> Password Entry.**

This will open the **Entry Info** dialog window.



1. Add Field button adds custom text field.
2. The main info area, it constrains credentials and custom fields.
3. Notes area represents a simple text editor, here you can add necessary notes.

There is the passwords generator feature included, which can be used for creating random passwords. Click on the **Generate** button and **Generate Password** dialog will be opened.

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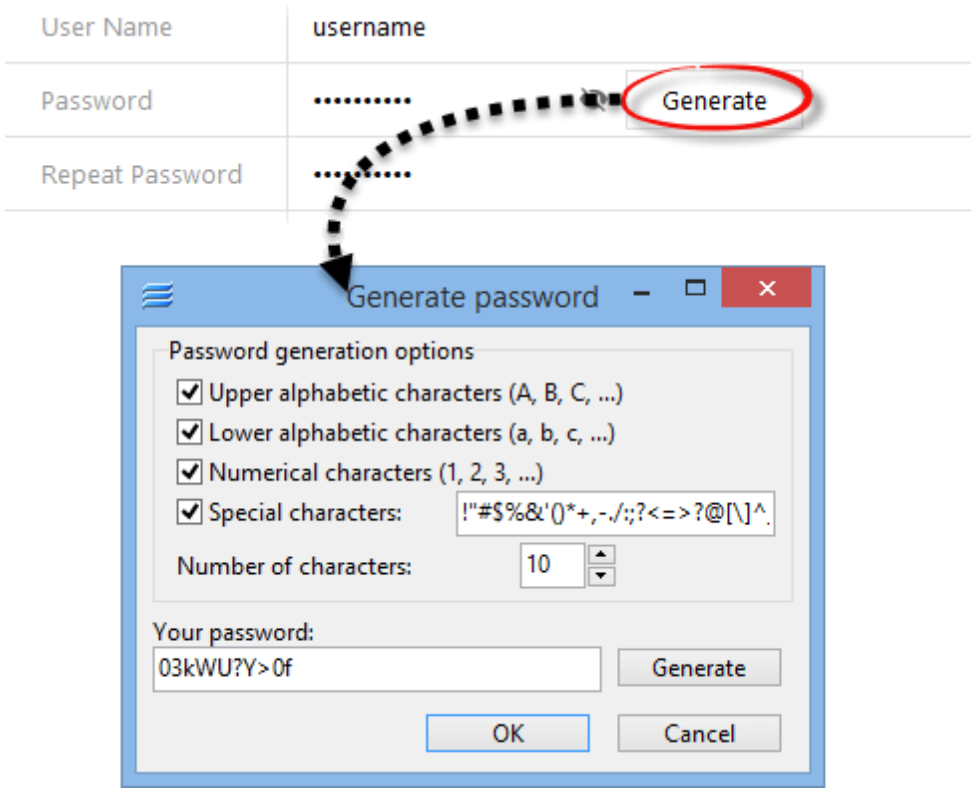
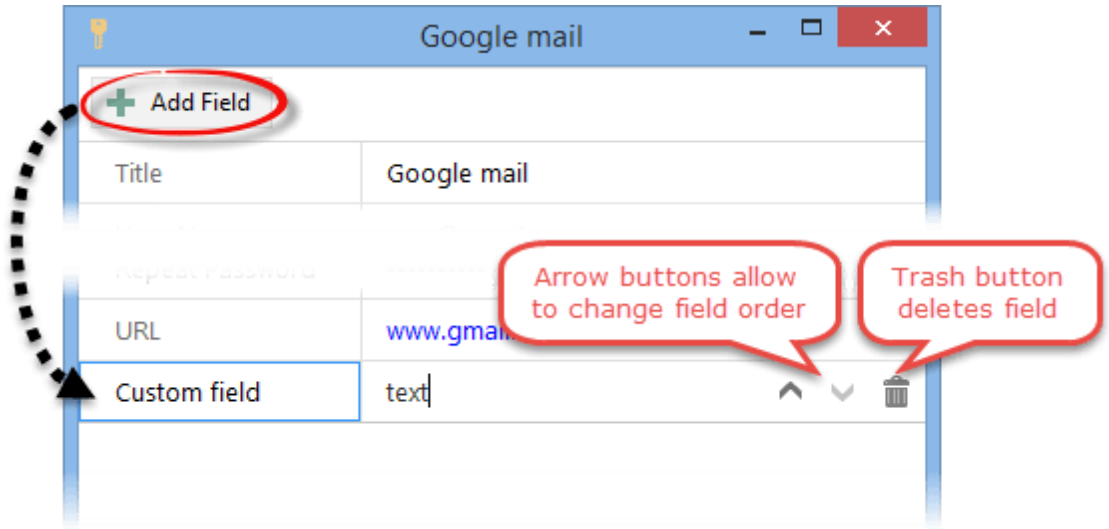


Adjust the password generation options for your needs and click **Generate**.

Custom fields

To add a new field or edit an existing one, open any password entry and use following tools to adjust fields setup.



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4.9 Import/Export data

4.9.1 Exporting

EssentialPIM offers a large variety of formats to export your existing data. Export options are at **File -> Export**.

All data can be exported one-by one, or you can select multiple entries using CTRL + mouse (for contacts and Notes), or All entries can be exported.
In most cases you can even select which fields to export.

Contacts can be exported to:

- Comma Separated Values (*.CSV, can be opened by MS Excel or any text editor)
- HTML (*.HTML, can be opened by an Internet browser)
- Rich Text Format (*.RTF, can be opened by many text editors)
- Text Files (*.TXT, can be opened by any text editor)
- vCards (*.VCF, a file format standard for personal data interchange, specifically electronic business cards)
- EPIM (*.epim is an original EessentialPIM database file)

Notes can be exported to:

- HTML
- Rich Text Format (*.RTF)
- Text Files (*.TXT)
- EPIM

Tasks can be exported to:

- HTML
- iCal (*.ICS)
- CSV
- EPIM

Calendar can be exported to:

- HTML
- iCal
- CSV
- EPIM

Mail can be exported to:

- EML

Password entries can be exported to:

- CSV
- EPIM

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4.9.2 Importing

Generally EssentialPIM Pro imports data via **File -> Import -> "Module name" -> "Data type"** menu. This topic covers data types supported by EssentialPIM.

Calendar

- **iCal**, calendar evens can be imported from iCal calendar files (*.ics). This is a common format for calendar files, used by many scheduling applications and online services (i.e. Google). The import dialog window will allow you to import already downloaded iCal file or the one located online, just mention path to it in the corresponding field.
- **CSV,** imports appointments from a *.csv file, a common data exchange format that is widely supported by lots of applications. Find the detailed instructions here.
- **EPIM**, imports appointments from another *.epim database file.

iCal calendars can be imported by drag&drop of the iCal (*.ics) files into the calendar window.

Tasks

- **iCal**, tasks can be imported from *.ics files, as well. The import dialog window will allow you to import already downloaded iCal file or the one located online, just mention path to it in the corresponding field.
- **CSV,** imports tasks from a *.csv files, a common data exchange format that is widely supported by lots of applications. Find detailed instructions here.
- **EPIM**, imports tasks from another *.epim database file. All tasks are imported exactly as they are in the imported file, preserving their structure.

Notes

- **RTF/TXT**, *.rtf and *.txt files are imported as a note, simultaneous import of multiple files is also supported.
- **TreePad**, imports TreePad *.hjt files. The hierarchical notes structure will be preserved upon import.
- **KeyNote**, imports KeyNote *.knt files. The hierarchical notes structure will be preserved upon import.
- **EPIM**, imports notes from another *.epim database file. All notes are imported exactly as they are in the imported file, preserving their structure.

Contacts

- vCard imports contacts from *.vcf files. Contacts are imported into selected group in the Contacts module.
- **CSV,** imports contacts from a *.csv files, a common data exchange format that is widely supported by lots of applications. Find detailed instructions here.
- **EPIM**, imports contacts from another *.epim database file. All contacts are

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imported exactly as they are in the imported file, preserving their structure.

Passwords

- **CSV** import process is similar to the one in Contacts and is described above.
- **Roboform HTML** imports *.html files from Roboform.
- **KeyPass XML** imports *.xml files created in KeyPass.
- **EPIM**, imports passwords from another *.epim database file. All password entries are imported exactly as they are in the imported file, preserving their structure.

Mail

EML - imports email messages from the *.eml files. Messages will be imported into the selected folder.

Outlook import

Imports data from MS Outlook *.pst files. You will be able to choose which Outlook data to import. If you wish to import mail, select the destination email account in EssentialPIM (Note, you might need to create an email account in EssentialPIM first if this option is disabled).

EPIM import

Allows you to import all types of data (except for mail) from another *.epim database file. All the data will be imported exactly as it is in the imported file, preserving its structure and links in between different items.

4.9.2.1 CSV Import

EssentialPIM Pro allows you to import Calendar, Tasks or Contacts data from a CSV file.

Once the CSV file is selected for import, you are going to see the following dialog window:

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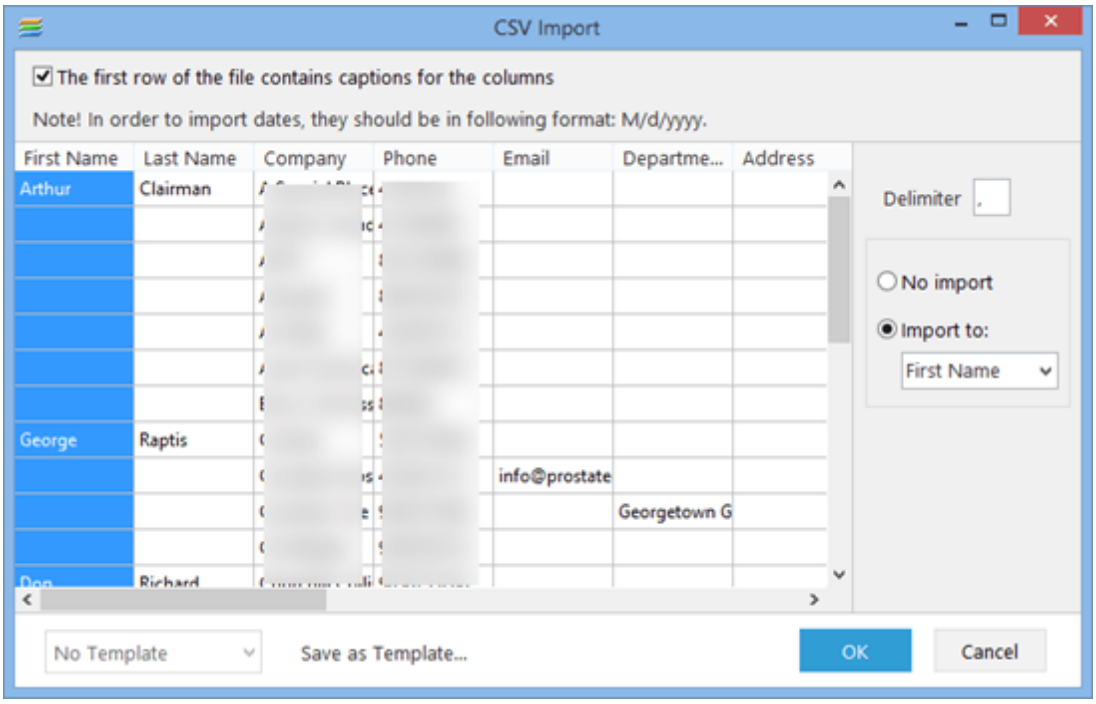

It allows you to map fields in the file to corresponding fields in EssentialPIM. If the first row in the CSV file contains field captions, enable **The first row of the file contains captions...** option at the top. In this case EssentialPIM will map the fields automatically and create new custom fields if needed upon import.

If there's no field captions in the CSV file, you need to map the fields manually. Select a field in the table by clicking on it and choose a mapping field in the **Import to** drop down list. Repeat for every other field.

In some case the **Delimiter** symbol setting will need to be adjusted. It is used to divide records in CSV files. By default EssentialPIM uses the coma "," symbol but as this format is not standardized and different applications may use different delimiter symbols when exporting data to CSV files, you might need to adjust it. Otherwise you may see all your data in the first column. If you are not sure which delimiter symbol to use, open the CSV file in the standard Windows Notepad program and you will be able to spot it. Once you have entered the correct delimiter symbol, EssentialPIM will adjust the rows automatically.

Once you are satisfied with the result, click on the **OK** button.

If you need to import data from similarly formatted CSV files on a regular basis, it's advised to utilize the **Templates** feature found at the bottom of the CSV Import dialog window. The feature will allow you to quickly use the desired importing settings each time you load a new CSV file into EPIM.

4.10 Synchronizations

4.10.1 Android

EssentialPIM is capable of synchronizing with Android devices. You need to download

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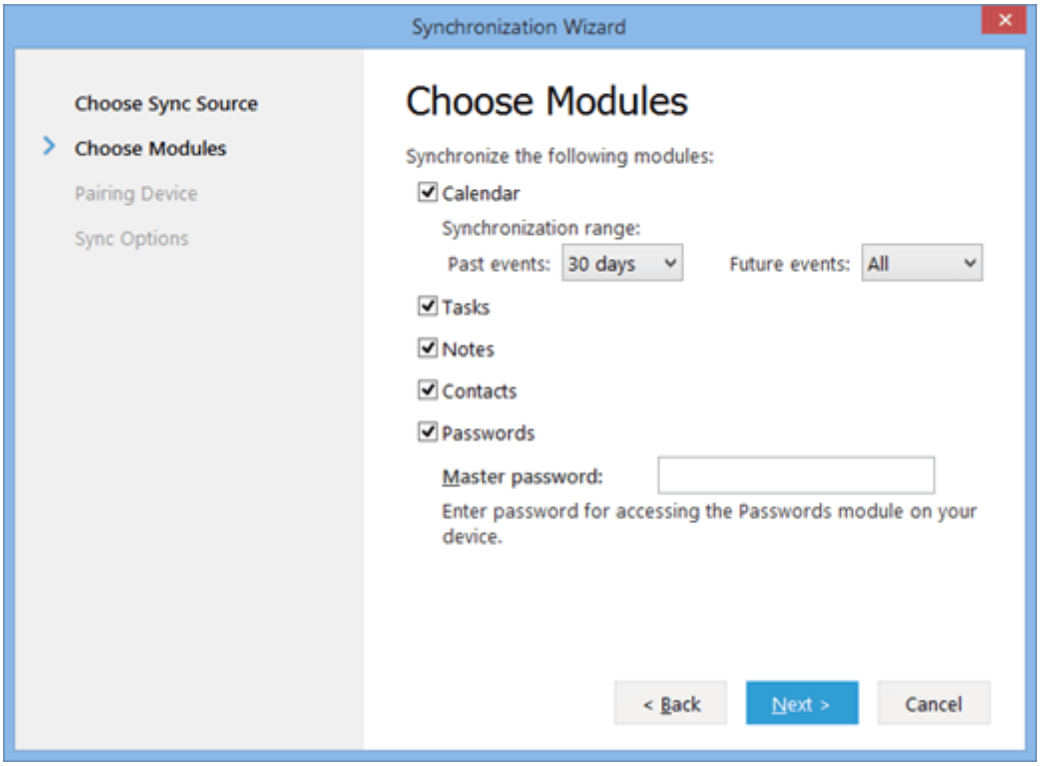
and install Android version of EssentialPIM onto your device [Google Play Link].

Pre-requisites for synchronization

- Device running Android 4.0.3 or newer version
- Common network between Android device and PC. This is usual that your PC and Android connect to the same router (Android device uses Wi-Fi, while PC uses Wi-Fi or cable). It is also possible to sync over cellular networks, Bluetooth or USB cable

Setting up and running synchronizations

To set up synchronization for the first time, click on **File -> Synchronization -> Add Synchronization -> Android.**



Choose data from which modules to synchronize and enter password for **Passwords** module (you may need to run EssentialPIM on Android first and set up master password by tapping the Passwords icon). Once you finish, press **Next**.

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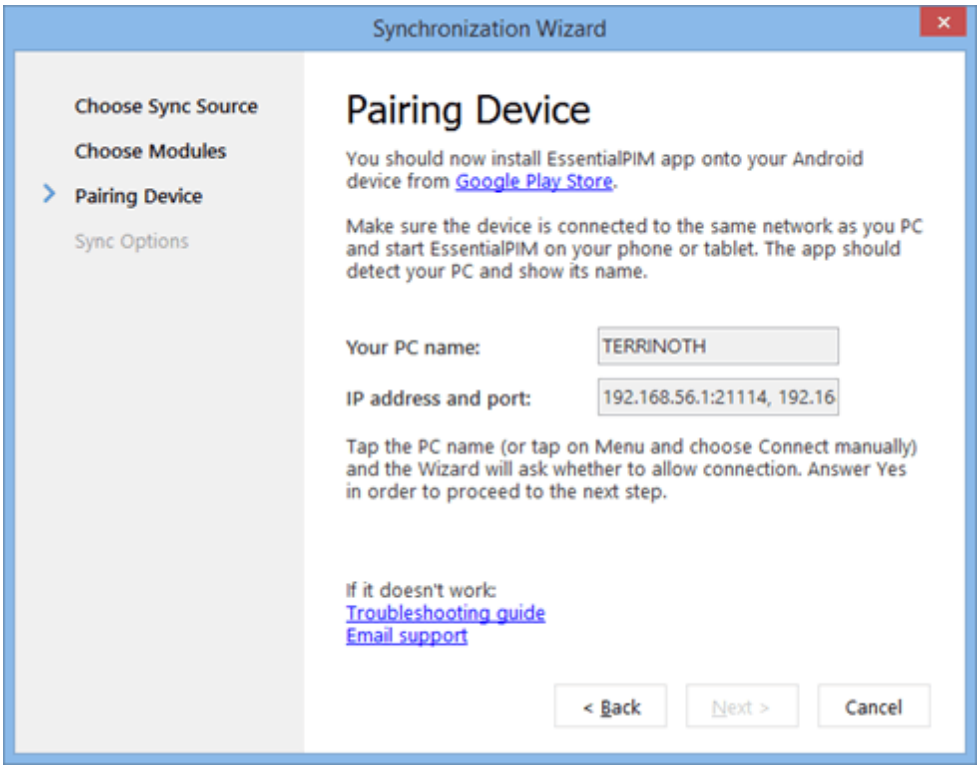
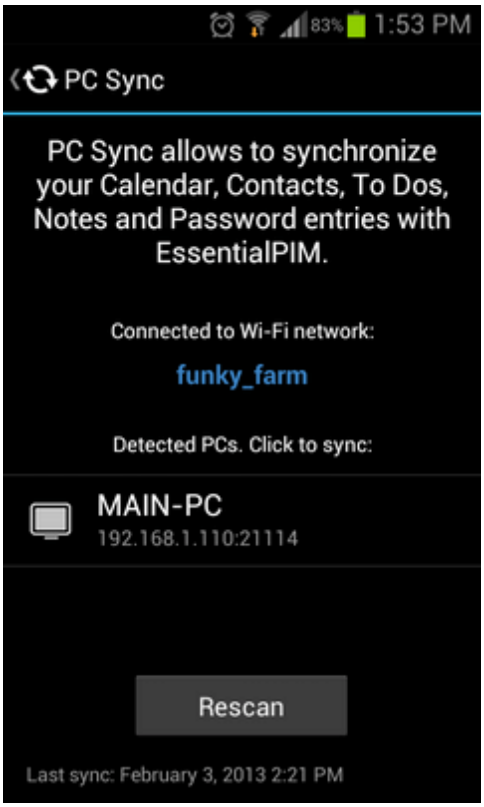


You are on the Pairing device step now, please carefully read all the instructions through. After that run EssentialPIM on an Android device and choose PC Sync option.



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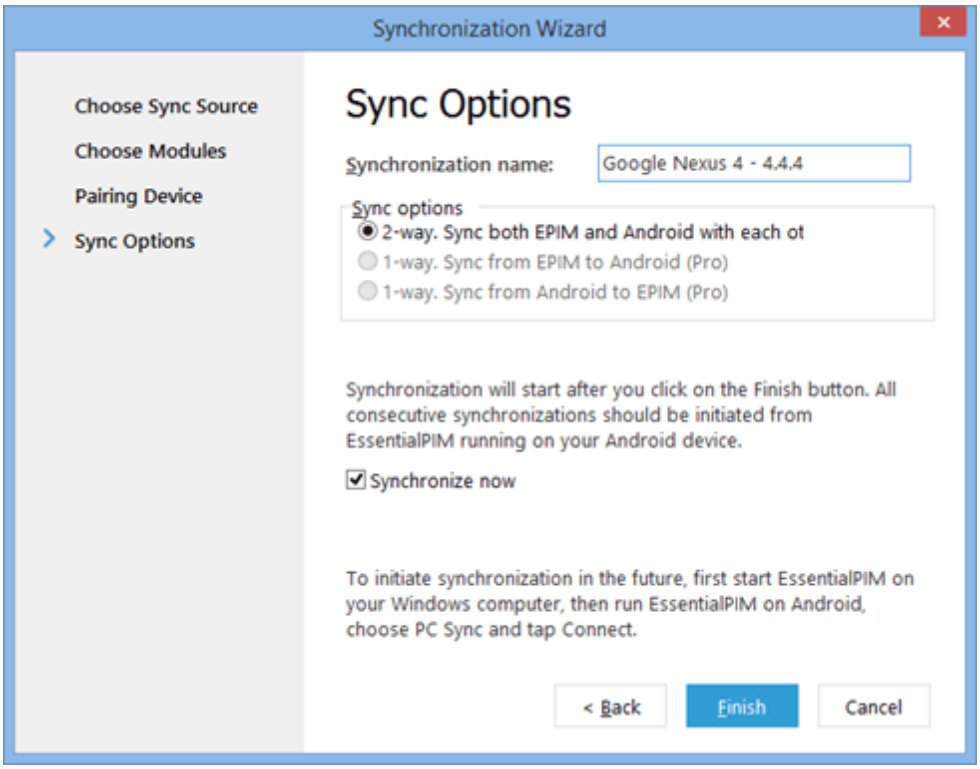
The app will automatically scan for PCs with running Windows version of EssentialPIM. If such a PC is found, its name will be listed. Tap the name in order to start the sync process. If Android EPIM cannot detect a PC, please try connecting to it manually by clicking on Menu and choosing the corresponding option.

In order to prevent any unauthorized synchronization attempts with different devices in the future, Windows EssentialPIM will ask whether to allow synchronization with your particular device upon first connection attempt.

On the last step of the synchronization wizard you'll be able to change synchronization name and choose sync direction.



On subsequent synchronizations, to start synchronizing, you need to:

- Start Windows version of EssentialPIM
- Start Android version of EssentialPIM, go to PC Sync and either tap your computer's name (if you're within the same network) or tap on Menu and choose Connect manually (if you're going to sync over a cellular network, Bluetooth or USB cable)

If something does not work, see Troubleshooting Android Synchronization.

4.10.1.1 Synchronization over USB Cable, Bluetooth, cellular networks, portable Wi-Fi hotspot

The fastest and easiest way to synchronize Android and Windows versions of EssentialPIM is via Wi-Fi. Although, synchronization can also be performed through other

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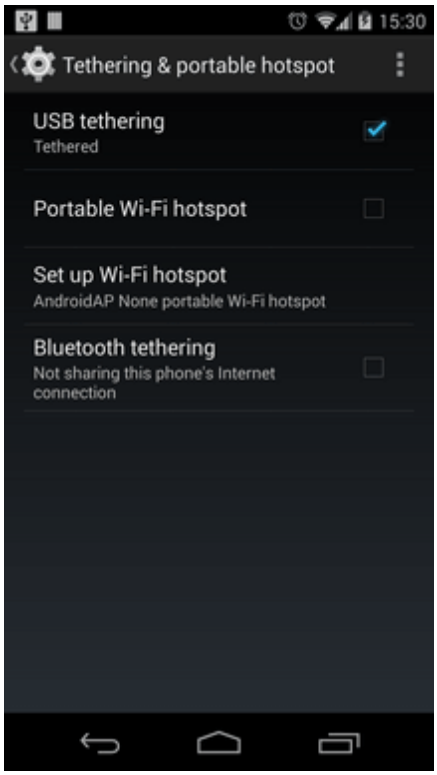
connection means like a USB cable, Bluetooth, cellular networks and portable Wi-Fi hotspot.

If for some reason you are unable to use a Wi-Fi connection, consider using one of the above mentioned methods. We are going to take a closer look at every one of them.

Synchronization over USB Cable

1. Connect your Android device to a PC
2. Go to the system settings on your phone or tablet, tap on the Tethering & portable hotspot menu option (usually located in the Wireless and networks section) and enable USB Tethering



3. On your PC click Start, type cmd and press enter (for Windows XP users click Start, click Run, type cmd and press enter)
4. In the opened window type ipconfig and hit enter. Note the IP address (IPv4 Address) that is listed under the Ethernet adapter Local Area Connection heading

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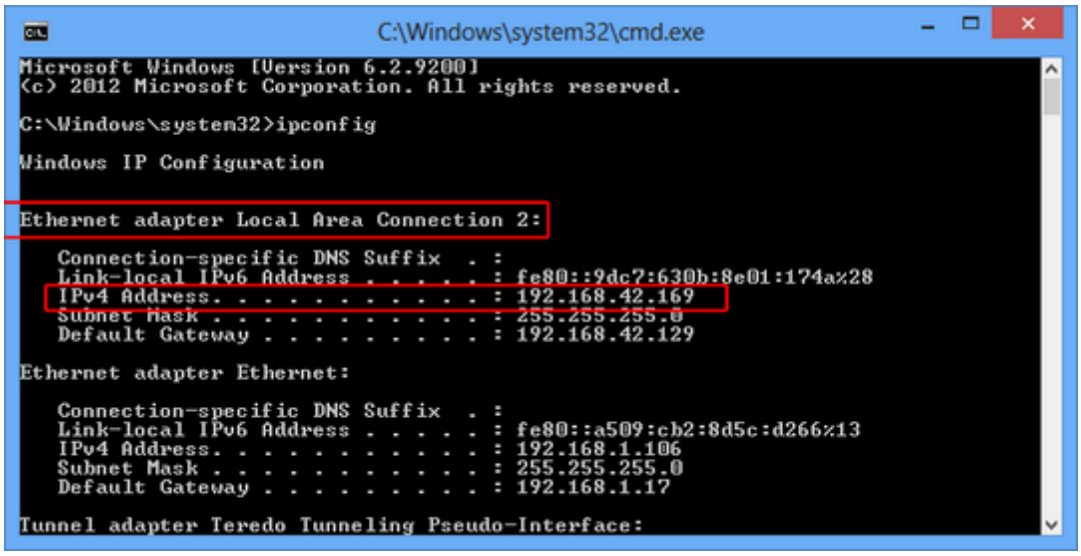
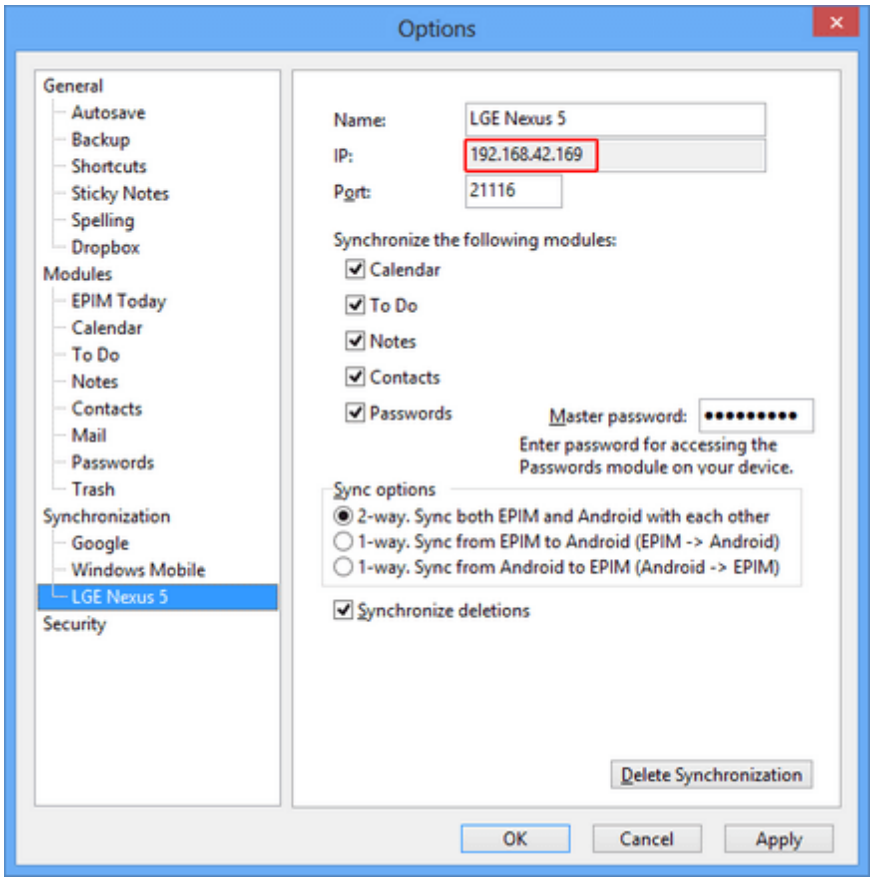


5. Now start Windows version of EssentialPIM. If you have synchronized previously, click on Tools->Options, Synchronization and choose your device. You should be able to see the IP address you noted earlier in the IP address field



If this is your first synchronization, click on File->Synchronizaton->Add Synchronization->Android and follow the on screen wizard instructions unless you are

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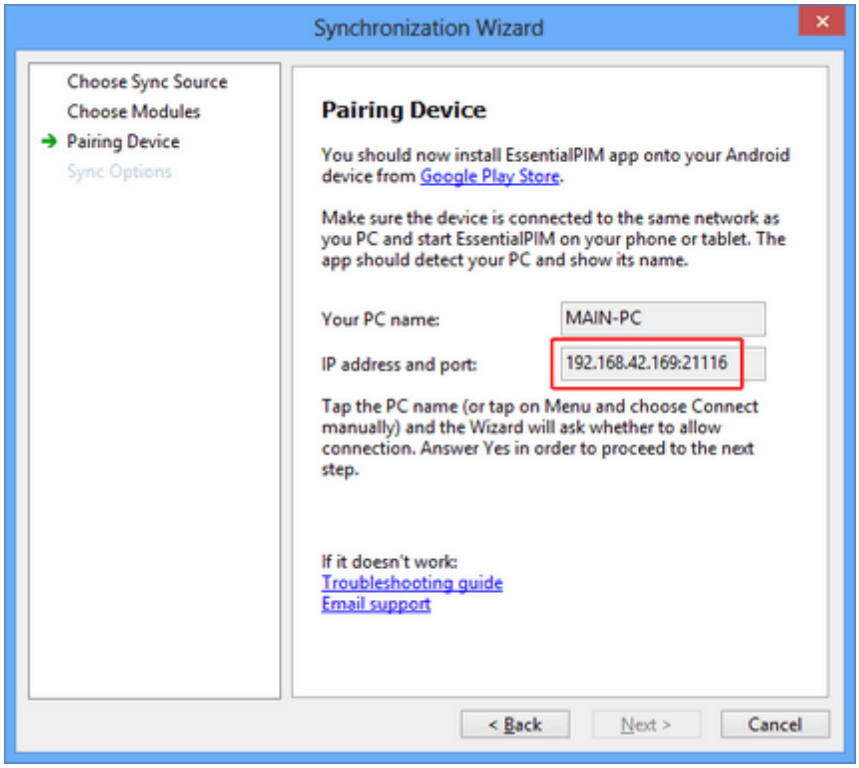
on the Pairing Device step. You should be able to see the IP address you noted earlier in the IP address and port field



6. Return to Android version of EssentialPIM and tap on PC Sync, Menu -> Connect manually
7. Enter the IP address, change the port number (if needed) and click on Connect

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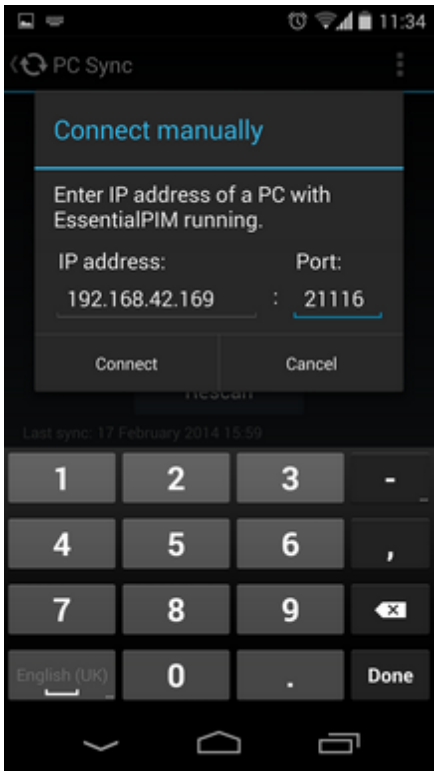

8. Synchronization should start

Synchronization over cellular networks (3G, LTE)

First, you should know the external IP address of your PC. Let's take a look at how to find it.

1. Visit a search engine like Google and search for: what's my ip
2. The first result you get should be a site called What Is My IP, click on it
3. Your external IP address will be displayed on the resulting page. Note it

If you're connected to the Internet through a router, you need to go to its settings and set up the port forwarding feature so that all external requests to the TCP/UDP port number 21114 (default EssentialPIM port) are redirected to your PC. Please consult with your router's documentation about how to do that or contact our customer support team.

Next step is to ensure that your firewall allows Windows version of EssentialPIM to accept inbound traffic from the Internet. If you use Windows Firewall:

1. Click on Control Panel -> Windows Firewall
2. Click on the Allow an app or a feature through Windows Firewall link on the left

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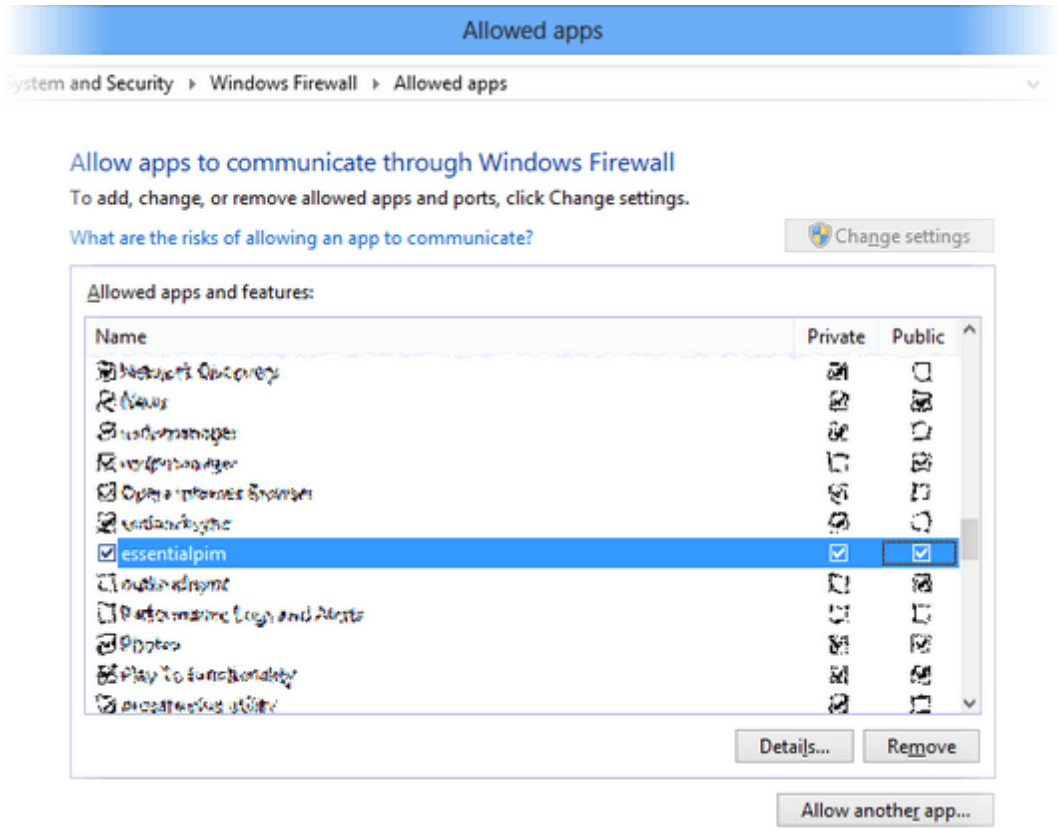
3. Make sure both checkboxes for Private and Public columns are selected for essentialpim



If you use any other firewall software, please consult with its documentation.

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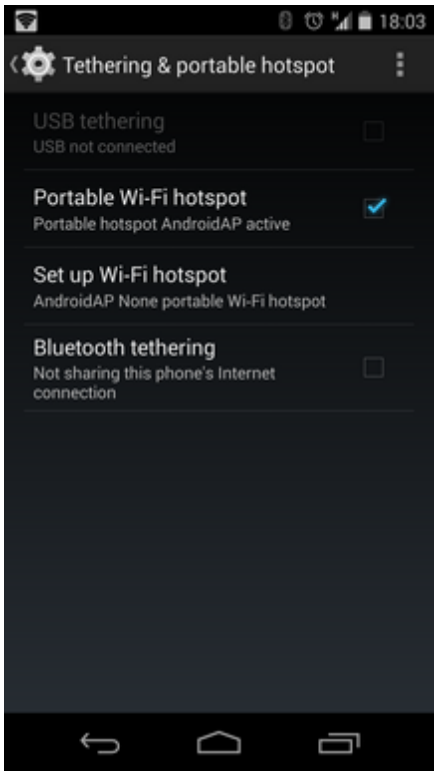
All preparations are done, please return to Android version of EssentialPIM and tap on PC Sync, Menu -> Connect manually. Enter the external IP address you noted earlier, change the port number (if needed) and click on Connect.

- If you have synchronized previously make sure Windows version of EssentialPIM is running
- If this is your first synchronization, click on File->Synchronizaton->Add Synchronization->Android and follow the on screen wizard instructions. Click Connect on your Android phone or tablet when you are on the Pairing Device step

Synchronization over portable Wi-Fi hotspot

When this option is used, a private Wi-Fi network will be created in between your PC and the Android device. In this case your phone or tablet acts as a router and PC connects to it.

1. Go to the system settings on your Android device, tap on the Tethering & portable hotspot menu option (usually located in the Wireless and networks section) and enable Portable Wi-Fi hotspot (in some cases Android will ask you to configure the hotspot, please follow the on-screen instructions)



2. On your PC or laptop, select your handset's network from the list of Wi-Fi connections available and connect to it
3. Click Start, type cmd and press enter (for Windows XP users click Start, click Run, type cmd and press enter)
4. In the opened window type ipconfig and hit enter. Note the IP address (IPv4 Address) that is listed under the Wireless LAN adapter Wi-Fi heading

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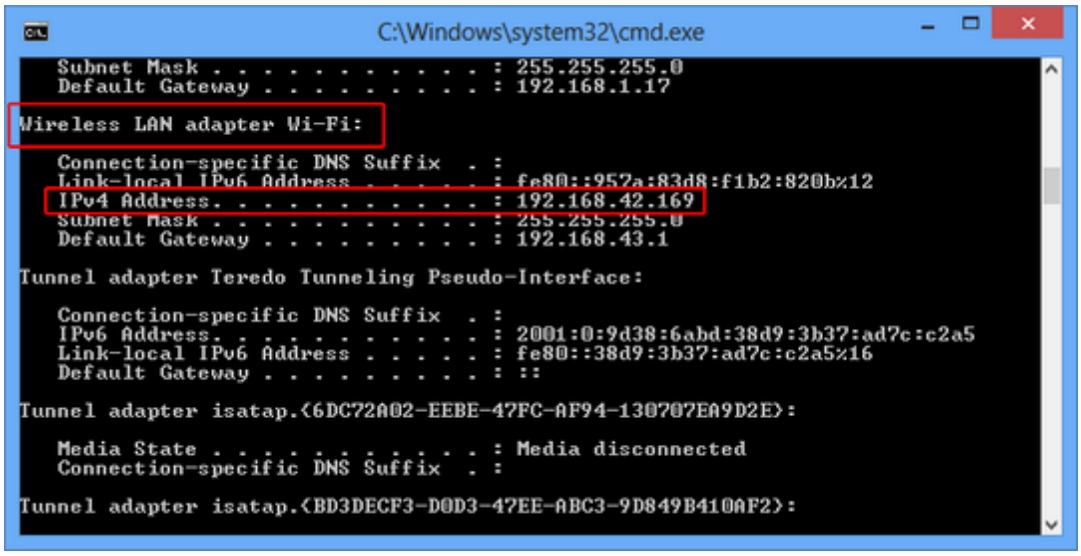
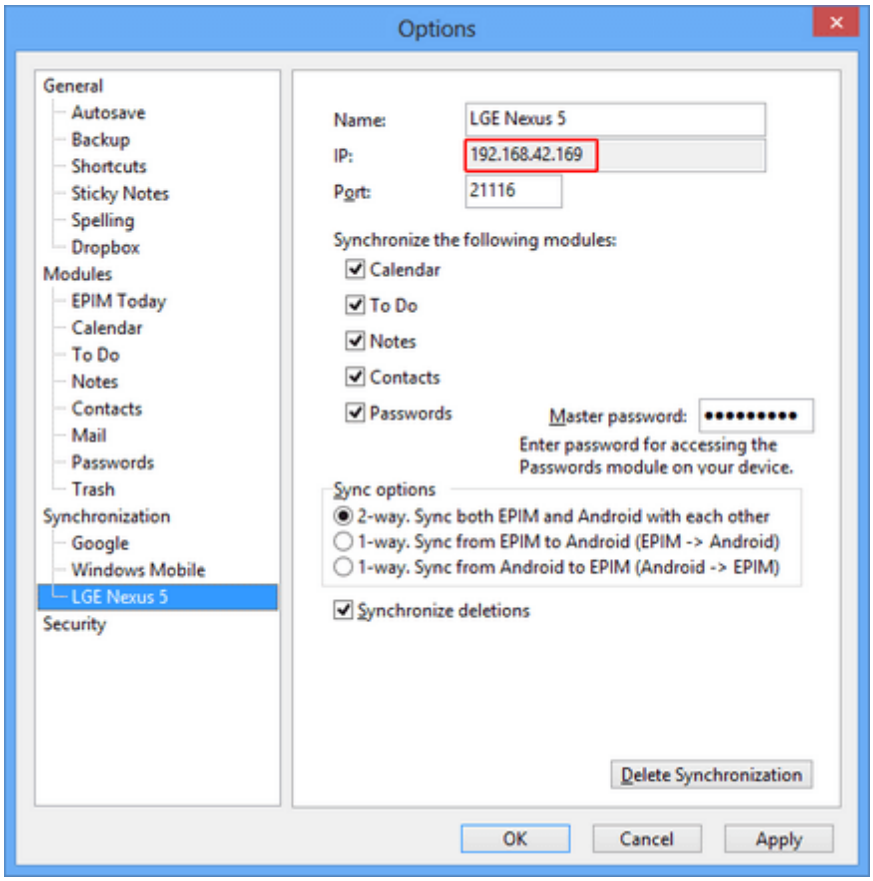


5. Now start Windows version of EssentialPIM. If you have synchronized previously, click on Tools->Options, Synchronization and choose your device. You should be able to see the IP address you noted earlier in the IP address field



If this is your first synchronization, click on File->Synchronizaton->Add Synchronization->Android and follow the on screen wizard instructions unless you are

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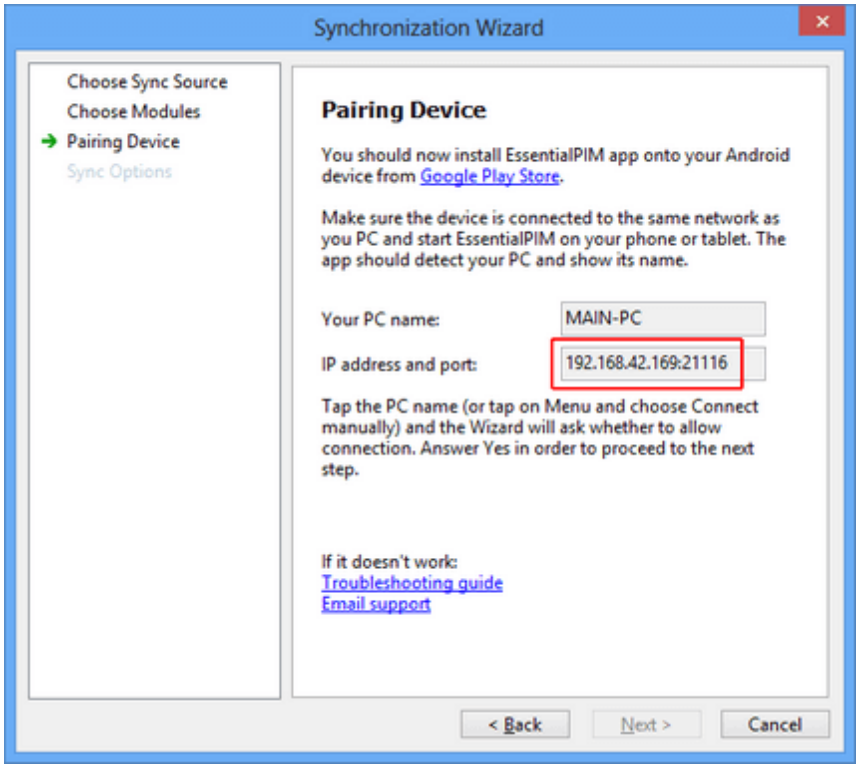
on the Pairing Device step. You should be able to see the IP address you noted earlier in the IP address and port field



6. Return to Android version of EssentialPIM and tap on PC Sync, Menu -> Connect manually
7. Enter the IP address, change the port number (if needed) and click on Connect

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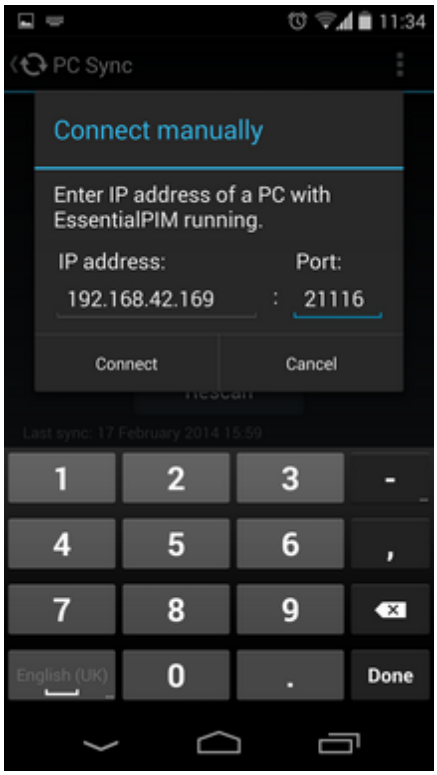

8. Synchronization should start

Synchronization over Bluetooth

1. Go to the system settings on your phone or tablet, tap on the Tethering & portable hotspot menu option (usually located in the Wireless and networks section) and enable Bluetooth tethering

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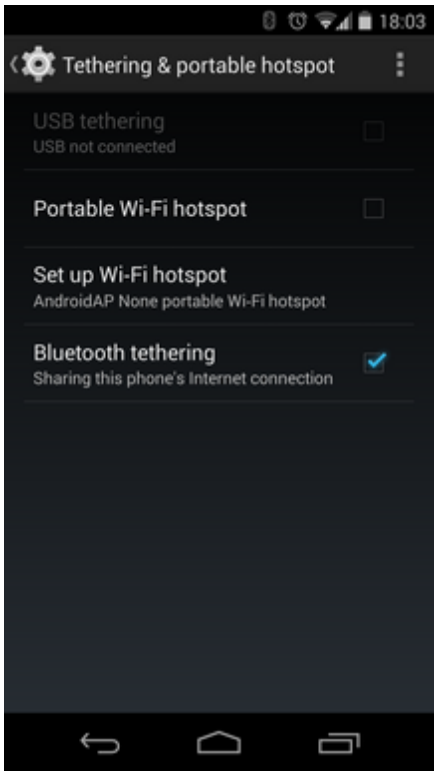
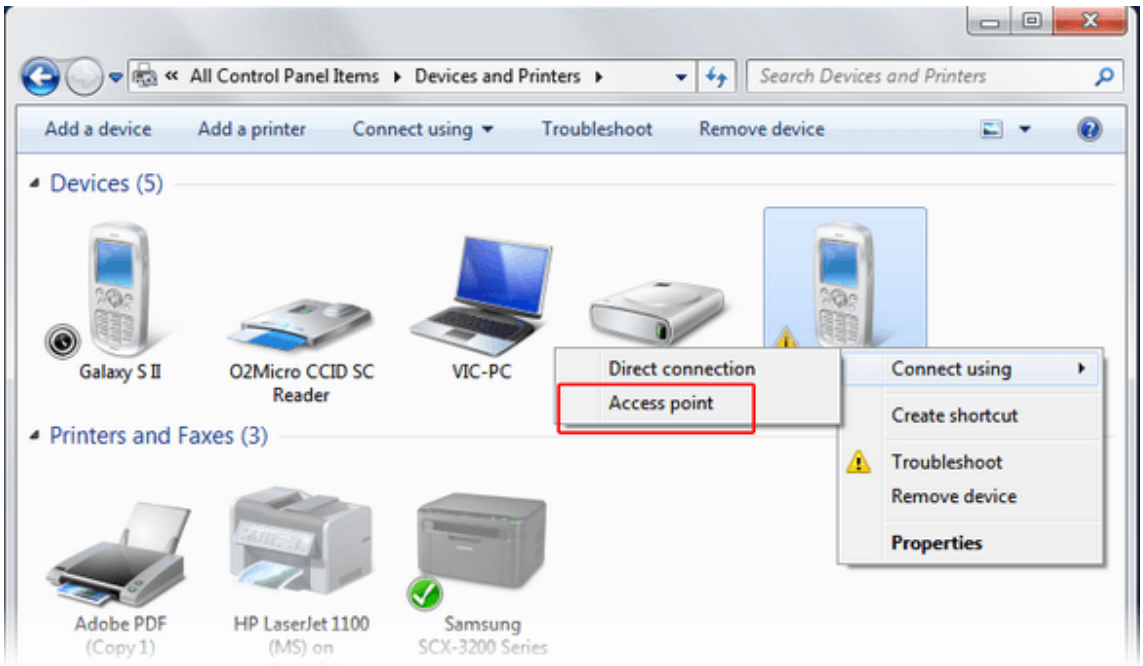


2. Enable Bluetooth on your PC and set your Android device to be discoverable
3. Click on Control Panel -> Devices & Printers and use the Add a Device button to add your phone or tablet and pair it with your PC
4. Once the devices are paired, right-click your phone and select Access Point



5. Click Start, type cmd and press enter (for Windows XP users click Start, click Run,

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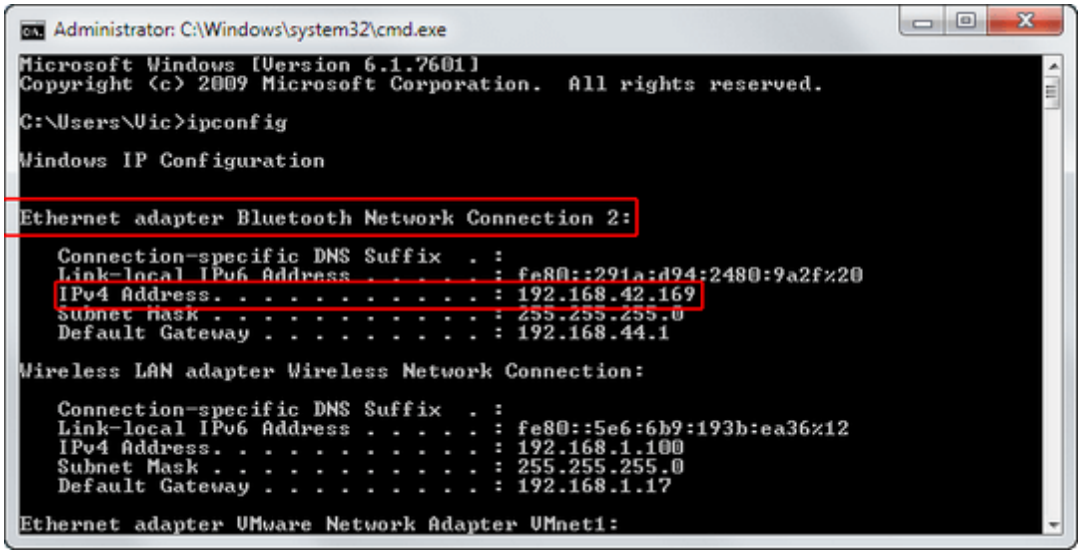
type cmd and press enter)
6. In the opened window type ipconfig and hit enter. Note the IP address (IPv4 Address) that is listed under the Ethernet adapter Bluetooth Network Connection heading



7. Now start Windows version of EssentialPIM. If you have synchronized previously, click on Tools->Options, Synchronization and choose your device. You should be able to see the IP address you noted earlier in the IP address field

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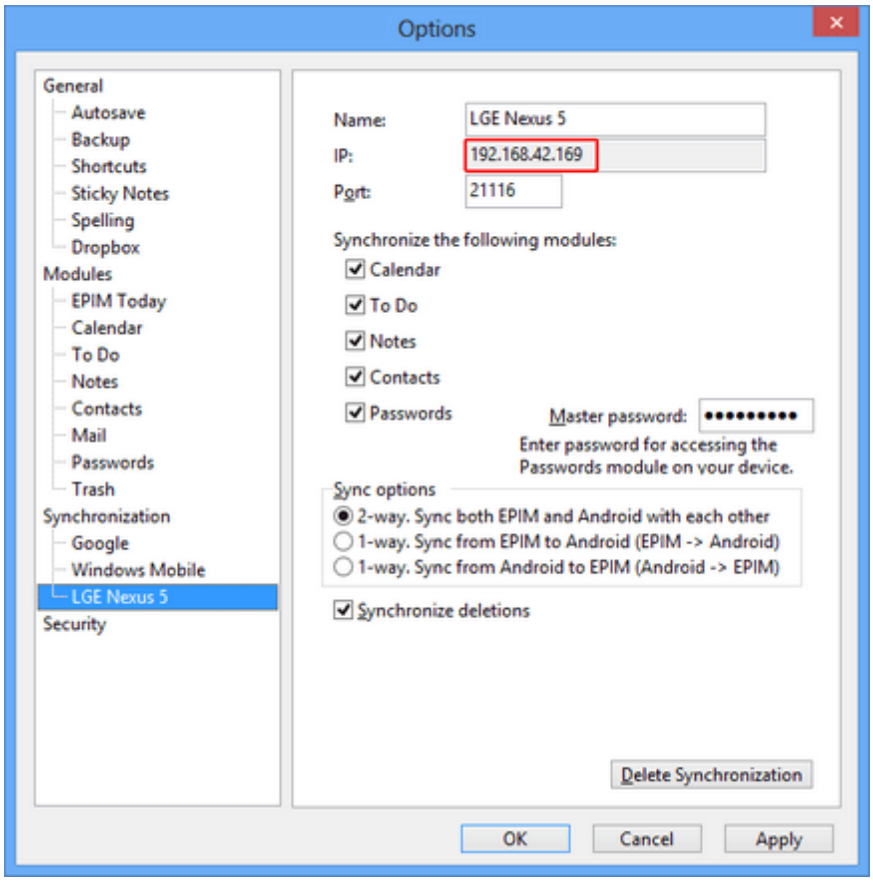

If this is your first synchronization, click on File->Synchronizaton->Add Synchronization->Android and follow the on screen wizard instructions unless you are on the Pairing Device step. You should be able to see the IP address you noted earlier in the IP address and port field

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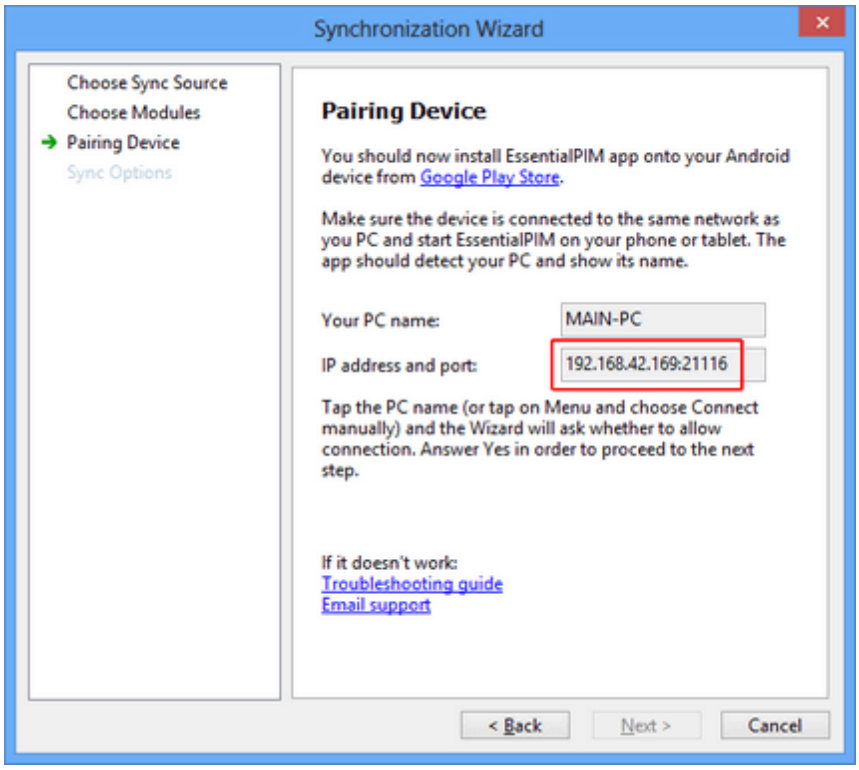
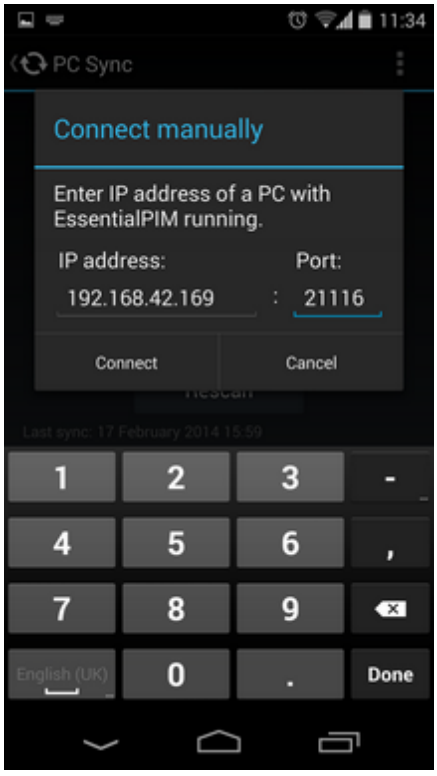


8. Return to Android version of EssentialPIM and tap on PC Sync, Menu -> Connect manually
9. Enter the IP address, change the port number (if needed) and click on Connect



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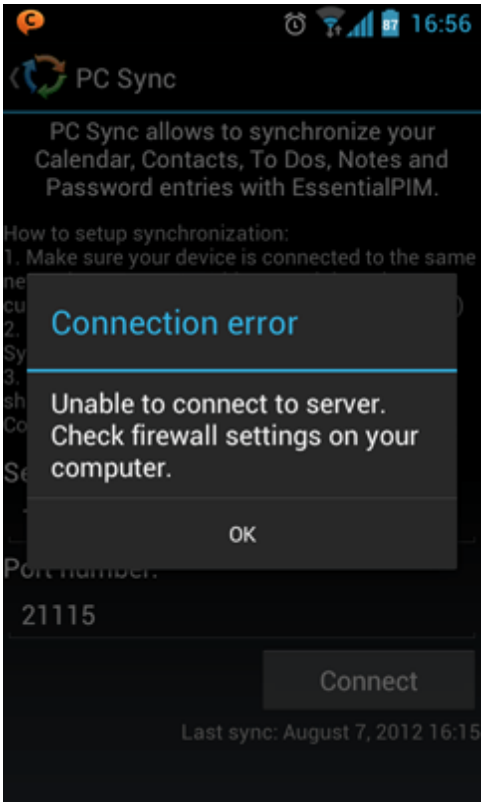
10. Synchronization should start

4.10.1.2 Troubleshooting

If after tapping on the detected PC you see the following connection error message:



Make sure:

- You have read Setting up Android synchronization
- You use the latest Windows EssentialPIM version (check Help-> Check For New version)
- Windows version of EssentialPIM is on the Pairing Device step in the synchronization Wizard (If not paired previously. If paired, Windows EssentialPIM needs to be running without Wizard)
- Firewall allows connections over port 21114 (default), or change the port number in Windows EssentialPIM Wizard
- Try to use the Connect manually option. It can be accessed by tapping on Menu

If the app is unable to find a PC with running EssentialPIM:

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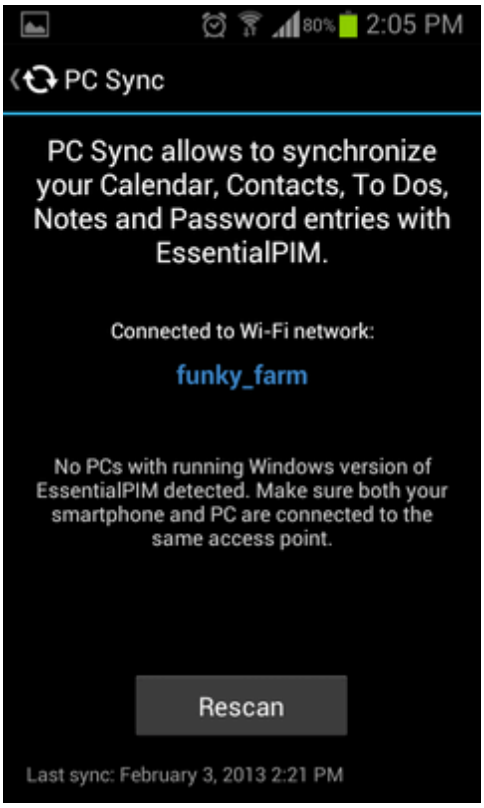

Follow these steps:

- Make sure EssentialPIM is actually running (you will not believe how many times this was the actual cause of the problem)
- EssentialPIM should be on the Pairing Device step in the synchronization Wizard (if not paired previously. If paired, Windows EssentialPIM needs to be running without Wizard)
- Try tapping on the Rescan button couple of times
- Try increasing the Scan timeout option in PC Sync settings. We recommend to set the highest number possible and then gradually decrease it until you reach a stable detection rate
- You use common network between Android device and PC (same network). If not, see the next bullet point below
- If nothing of the above helps (or it is impossible to have your PC and Android device in the same network), try synchronizing using other methods like USB cable, Bluetooth, cellular networks or portable Wi-Fi hotspot

If you are sure all of this is done, but still no go, please email support for further assistance.

4.10.2 iOS EPIM (iPhone/iPad/iPod Touch)

EssentialPIM is capable of synchronizing with iOS devices. You need to download and install free iOS version of EssentialPIM onto your device from App Store. You will be able to synchronize and manage following data:

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Windows EssentialPIM		iOS EssentialPIM
Calendar	<->	Calendar (iOS built-in)
Contacts	<->	Contacts (iOS built-in)
Tasks	<->	Tasks (inside iOS EPIM)
Passwords	<->	Passwords (inside iOS EPIM)

Pre-requisites for synchronization

- Devices supported: iPhones 3GS and newer, all iPADs, iPOD 3 and newer (provided iOS 5 or newer is installed)
- iTunes is installed on PC
- Common Network between iOS device and PC. This is usual that your PC and iOS connect to the same router (iOS device uses Wi Fi, while PC uses Wi Fi or cable)

Setting up iOS EPIM synchronization

1. On **Windows EPIM**, click on **File -> Synchronization -> Add Synchronization -> iPhone/iPad.**
A wizard will start that will guide you through setting up a synchronization. This is a one-time process, after this you will need only start synchronizations from your device.

2. On **"Sync Credentials"** step, choose modules to synchronize.

3. On next, **"Pairing Device"** step, you should search for "EssentialPIM" on App Store on your device and install it.
Tip: Make sure your iPhone/iPad Wi Fi is connected to the same network as your Windows computer.

4. After you run **EssentialPIM on your iPhone/iPad**, choose **"PC Sync"** menu.

You should see this screen (press Start):

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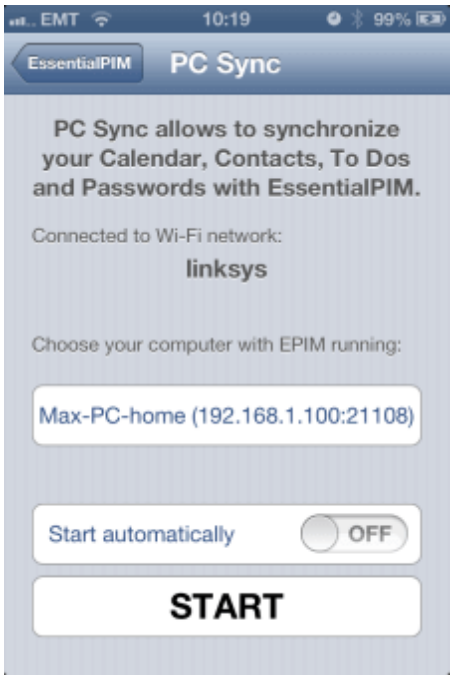
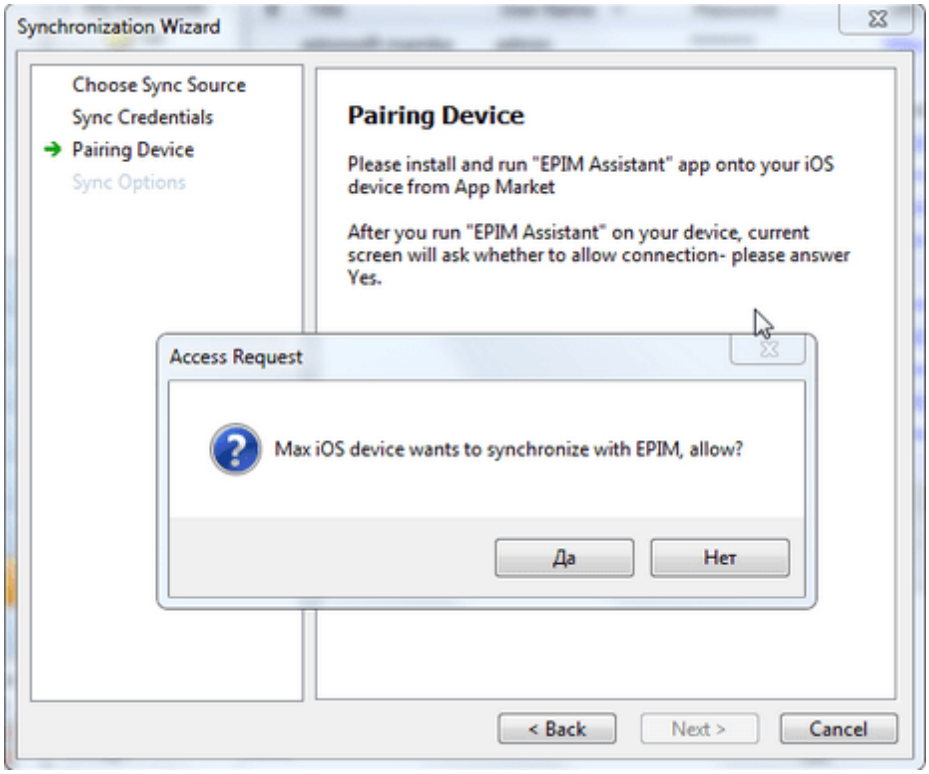


Tip: If you do not see "Start" button, make sure your Windows EPIM is now on **"Pairing Device"** step and you have iTunes installed on Windows!

5. At the same time, **EssentialPIM on Windows** will ask for confirmation:



This is needed to prevent any unauthorized synchronization attempts with different devices in the future.

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6. Next, "Sync Options" step presents you with some Options. Default Options are usually OK.

On subsequent synchronizations, to start synchronizing, you need to:

- start Windows EPIM
- start iOS EPIM, go to "PC Sync" and press "Start"

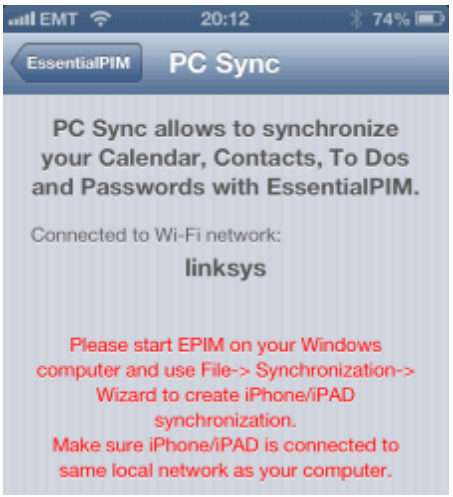
If something does not work, see Troubleshooting iOS Synchronization

More details on synchronization

For each EssentialPIM category on Windows, a separate Calendar will be created on iPhone/iPad (to change this go to **Tools-> Options-> Your synchronization** and uncheck **"Create calendars in iPhone for each of EPIM categories"**. In this case all EPIM categories will be synchronized to one default calendar on your iPhone/iPad).

4.10.2.1 Troubleshooting iOS Synchronization

If you want to start synchronization, but instead see this screen on iOS EPIM:



Make sure:

- You have read "Setting up iOS EPIM synchronization"
- iTunes is installed on PC
- You use the latest Windows EPIM version (check Help-> Check For New version)
- **Windows EssentialPIM** is on **"Pairing Device"** step (if not paired previously. If paired, Windows EPIM needs to be running without Wizard)
- You use Common Network between iOS device and PC (same network)
- Firewall allows connections over port 21108 (default), or change it in PC EPIM Wizard
- If you are sure all of this is done, but still no go, please email support with screenshots of Windows EPIM and iOS EPIM.

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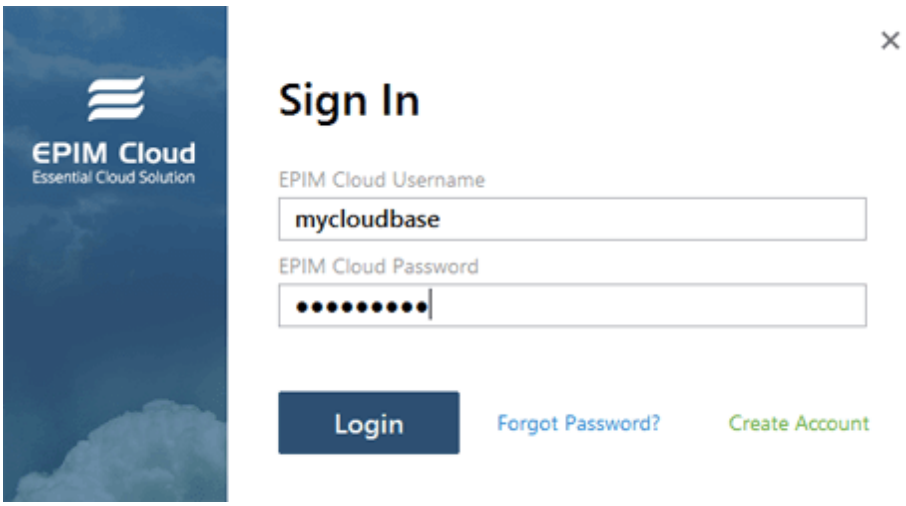
4.11 EPIM Cloud

It is now possible to have all your EssentialPIM data stored in EPIM Cloud. This is very handy when you need to access your data from different locations and share it with other EssentialPIM users. All your data can be easily accessed from any device or PC even without EssentialPIM installed, just using a web browser.

EPIM Cloud service is designed to securely synchronize EssentialPIM data between Windows devices. All data is accessible solely via SSL, the same protocol that protects online banking. With EPIM Cloud you can safely share any kind of data with colleagues in your team as well as synchronize your home and office PCs, or just share a schedule with your family members.

4.11.1 Registration

To start using EPIM Cloud, click on **File -> EPIM Cloud -> Sign in**.



If you already have an EPIM Cloud account, enter your username and password and click on **Login**. If you are new to EPIM Cloud, click on **Create Account** to start a wizard that will guide you though the account creation process.

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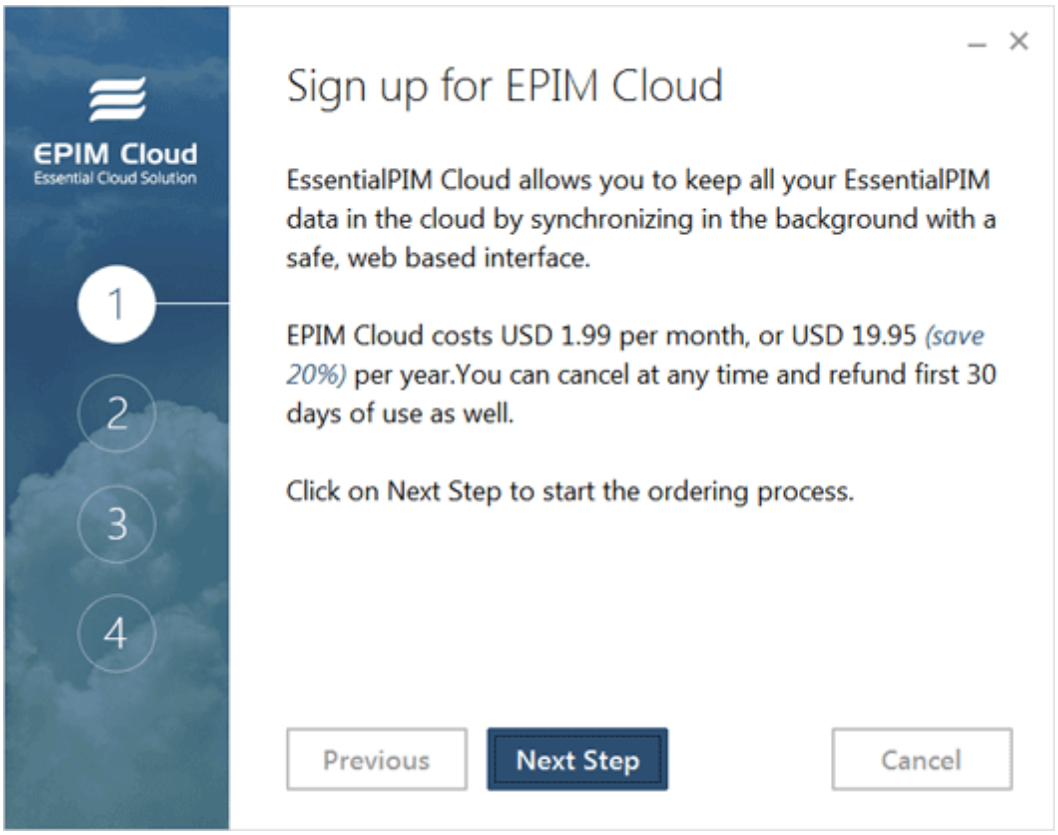

The first step provides general info about EPIM Cloud service and pricing.

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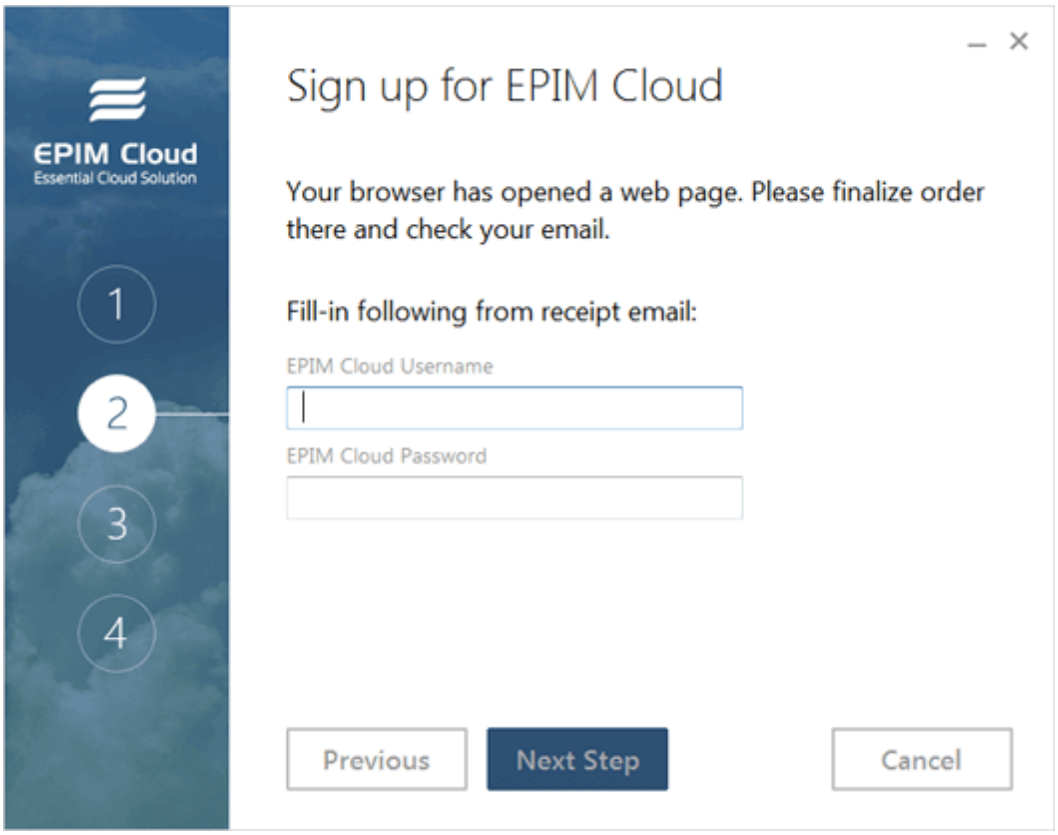

Second step automatically opens the ordering form in your web browser. Once you finish ordering, you'll be provided with username and password to login to EPIM Cloud. Enter them into the corresponding fields.

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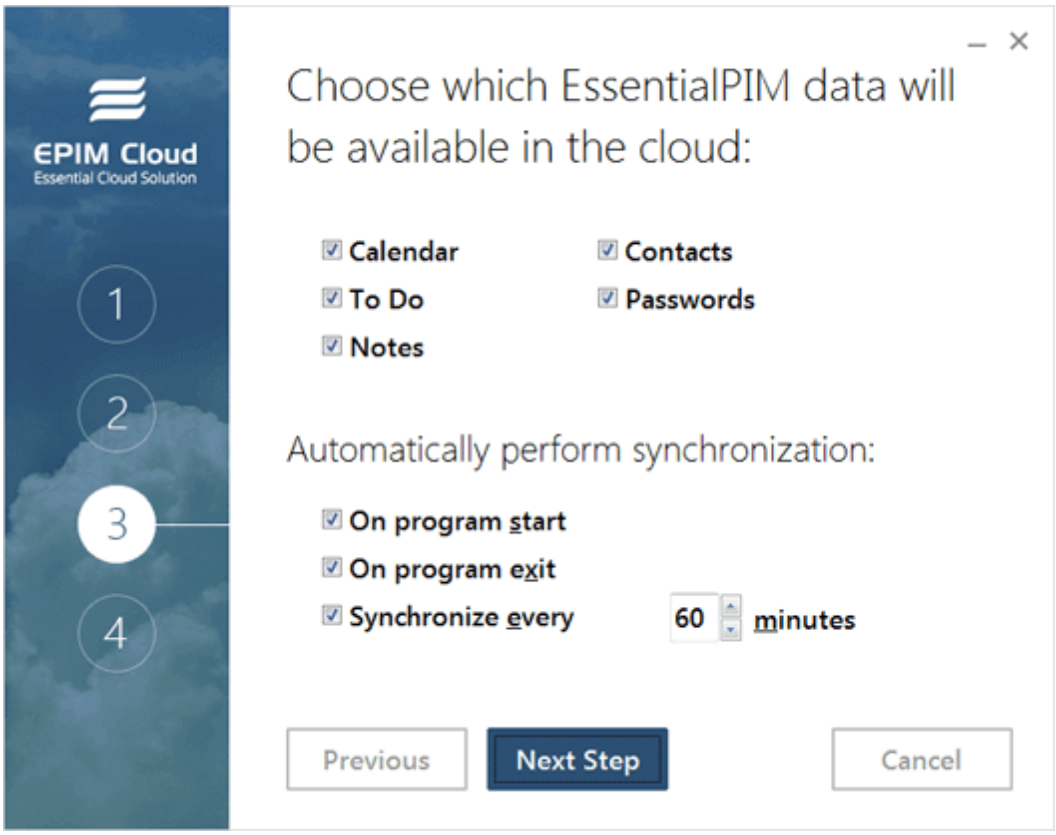

On the third step you can choose which EssentialPIM data will be accessible via EPIM Cloud and how often it will be synchronized. Note, though EssentialPIM can sync all your data with EPIM Cloud, only three modules can be accessed directly via web browser: Calendar, Tasks and Contacts. Other modules like Notes and Passwords are securely stored in the cloud to be accessed solely via Windows version of EssentialPIM.

The last step finishes the registration process.

4.11.2 Synchronizing with EPIM Cloud

Synchronization with EPIM Cloud can be performed either automatically or manually. According default options, synchronization runs automatically on EssentialPIM start, exit and every hour. To start the synchronization manually, click on **File -> EPIM Cloud -> Synchronization**.

EPIM Cloud synchronization options can be accessed by clicking on **File -> EPIM Cloud -> Options** or under **Tools -> Options -> EPIM Cloud**.

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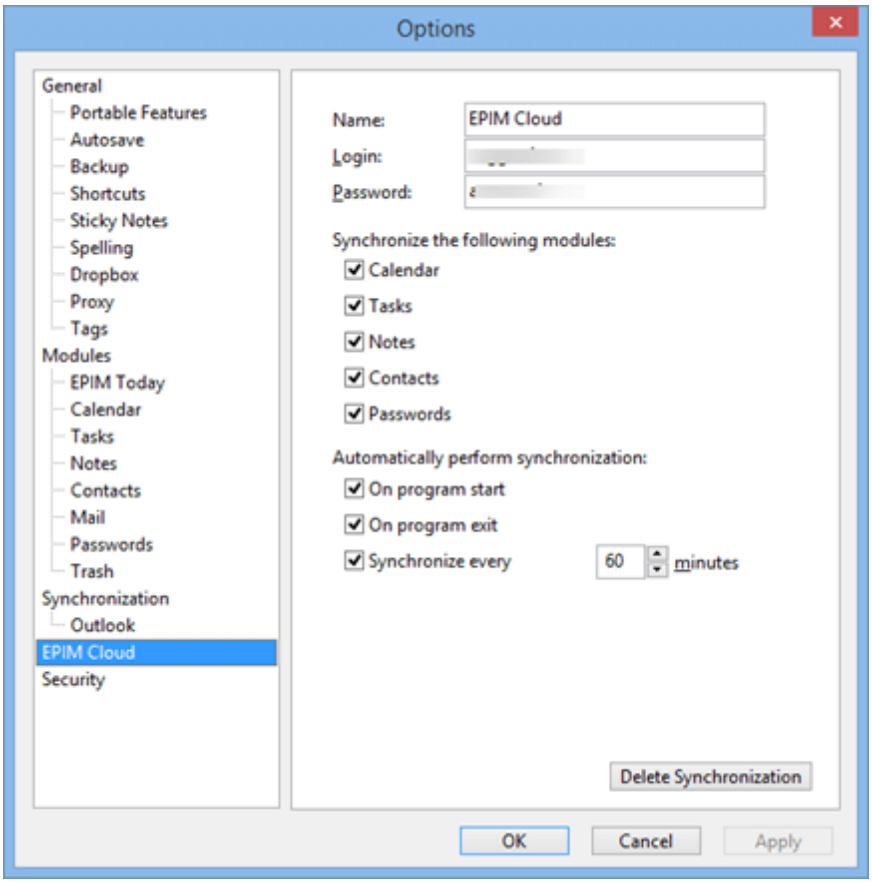

Please note, since the main purpose of EPIM Cloud is to share data between Windows versions of EssentialPIM, some changes made in the cloud through a web browser might not be properly reflected in EssentialPIM.

To stop using EPIM Cloud with the current EssentialPIM database file, **Sign out** by clicking on **File -> EPIM Cloud.** To completely remove synchronization with the service, click on the **Delete synchronization** button under **Tools -> Options -> EPIM Cloud**.

4.12 Printing

EssentialPIM allows you to print out all your information in easy to read form. Print menu is accessible at **File -> Print**.

What you print will depend on in which view you are currently in: Calendar, Notes, or Contacts.
All data can be printed one-by one, or you can select multiple entries using CTRL + mouse (for contacts and Notes), or All entries can be printed.
To rotate the page, in the Print Preview Page, find "Page Setup", or press Alt+U and you will be able to change the Orientation of the page.

Printing EPIM Today
You can print EPIM Today - exactly as it looks on the screen.

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Printing Calendar
There are several option of how to print Calendar: Day View, Week View and Month View. All are different options for representing your day schedule. You can also print several Days, Weeks and Months.

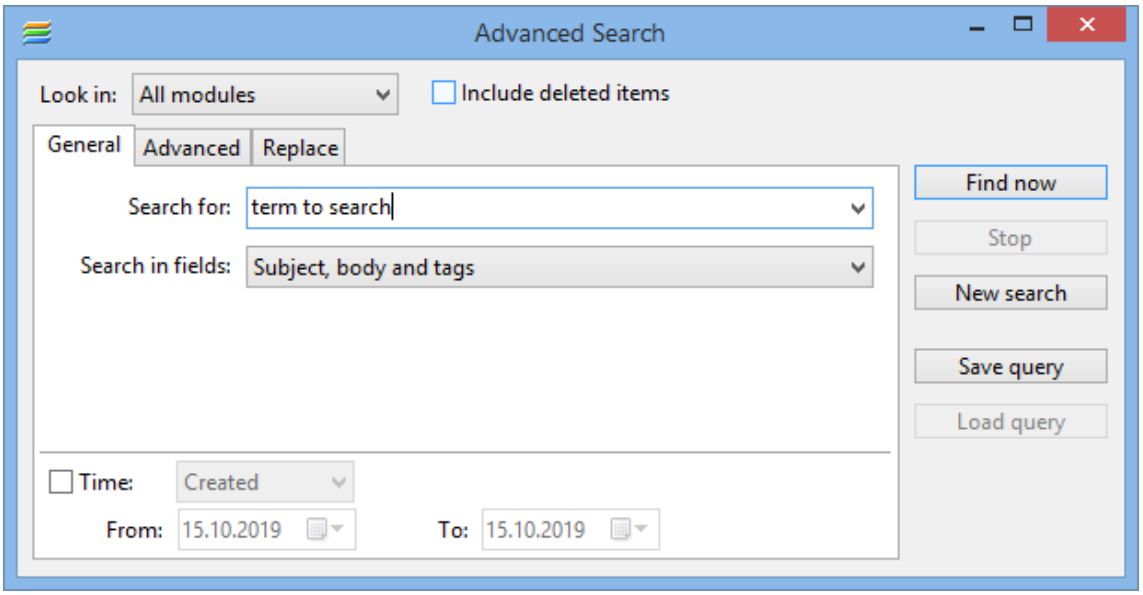
Printing Tasks
You can select which Tasks to print and which fields. If you want to select multiple Tasks, use CTRL+ Mouse, or Shift+ Keyboard arrows.

Printing Notes
You can select several, one or all notes to print out into. A tree of all notes is printed above all notes.

Printing Contacts
You can select which contacts to print out (using CTRL+ Mouse, or Shift+ Keyboard arrows), or print out all.

4.13 Advanced Search

Advanced Search allows you to look up for items through the whole EPIM database file. Go to **Tools -> Advanced search** or press **Ctrl+Alt+F** to call the Advanced search dialog:



Look in drop-down menu sets where to search and whether to **Include deleted items** in trash.
General and **Advanced** tabs allow performing simplified or complex search tasks.
Time option can limit search period for items created or modified within the specified time frame.

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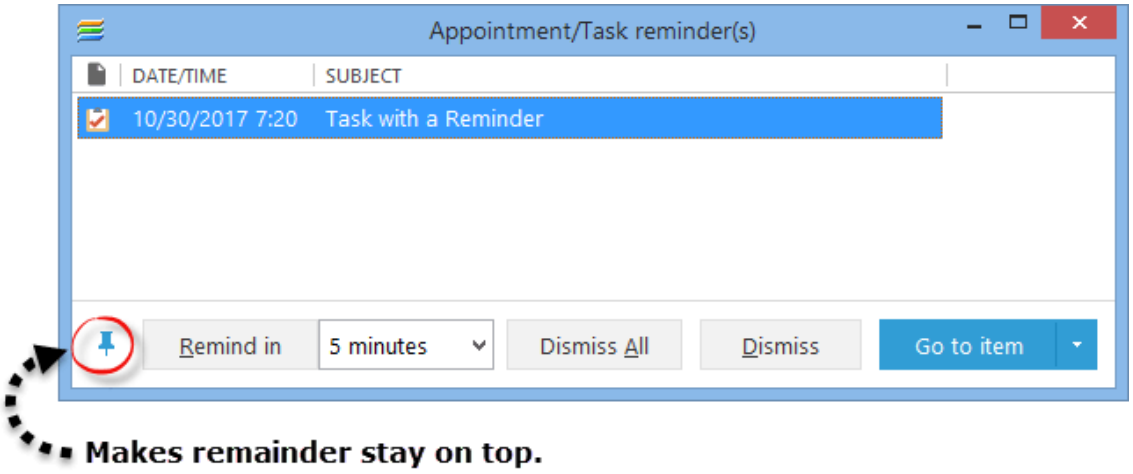
Search in the **General** tab looks for the whole phrase typed into the **Search for** field. **Search in fields** drop-down list allows to narrow down the search area to a subject, body or attachments fields.

4.14 Working with reminders

Reminders can be added to appointments and tasks. Once a reminder is triggered, the following window will be shown.



Go to item/Show Item - switches to the Calendar or Tasks module and either puts the focus on the selected item or opens a preview window for the selected item.
Dismiss - dismisses the selected reminder(s).
Dismiss All - dismisses all active reminders.
Remind in - postpones the selected reminder by a period of time chosen from the drop-down list next to the button.

Reminders can be sorted by any column, just click on the column's name. Holding down the Ctrl button on the keyboard, will allow you to sort by several fields.

4.15 Spell check

EssentialPIM provides built in spell checker in Notes. You can call spelling check by pressing **F7** or under **Tools -> Spelling check** menu.

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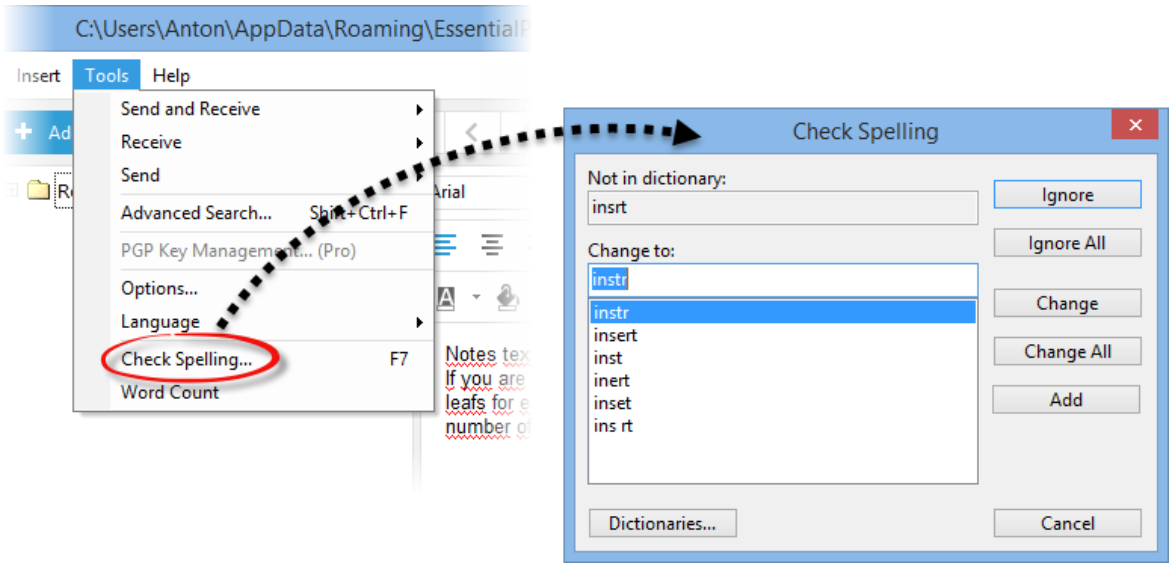

This will call a dialog which proposes general spelling check features:

Ignore - ignores current occurrence of the word
Ignore All - ignores all occurrences of the word
Change - changes the word to a selected variant
Change All - changes all occurrences of the word to a selected variant
Add - adds word to a dictionary
Dictionaries - allows to change dictionary

Spelling check options are available under **Tools -> Options -> Spelling**

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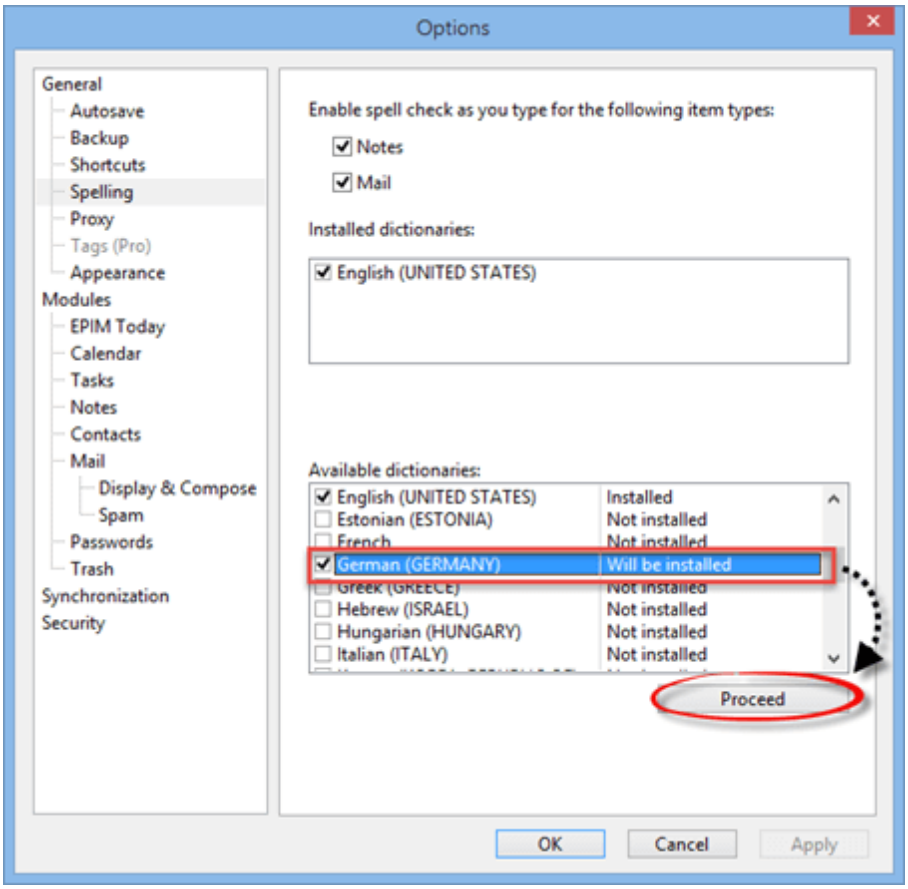

English (US) dictionary is installed by default but you can add any additional dictionaries you need. To do so, click on the checkbox besides the dictionary's name in the Available dictionaries section and click on the **Proceed** button. EPIM might ask you for administrator rights during the process, please confirm. Once installation is complete, new dictionaries will become instantly available.
To uninstall a dictionary, uncheck the checkbox near its name in the Available dictionaries section and click on the Proceed button.
To simply disable a dictionary, uncheck the checkbox near its name in the Installed dictionaries section.

4.16 Shortcuts

EssentialPIM Pro makes extensive use of shortcuts. All of the shortcuts can be edited by clicking on **Tools -> Options -> Shortcuts**. To edit a shortcut, select it in the list and press new key combination. Below is the list with default shortcuts.

Global:

Ctrl+Alt+S Minimize to system tray
Shift+Ctrl+T New Appointment
Shift+Ctrl+O New Task
Shift+Ctrl+N New Note
Shift+Ctrl+C New Contact
Shift+Ctrl+M New Message

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Shift+Ctrl+P New Password Entry

Switching Between modules:

Ctrl+0 EPIM Today
Ctrl+1 Calendar
Ctrl+2 Tasks
Ctrl+3 Notes
Ctrl+4 Contacts
Ctrl+5 Mail
Ctrl+6 Passwords
Ctrl+9 Trash

General:

Ctrl+L Hide/show private items
Ctrl+Q Focus on search box
Ctrl+Alt+F Advanced search
Shift+Ctrl+A Attachments manager

Database operations:

Ctrl+N New Database
Ctrl+O Open Database
Ctrl+S Save changes or New Database
Ctrl+P Print

In Calendar:

Ctrl+D Day View
Ctrl+W Week View
Ctrl+M Month View
Ctrl+R Year View
Ctrl+E Table View
Ctrl+T Today
Ctrl+G Go to
Ctrl+H Hide/Show completed

In Tasks:

Ctrl+T Tree View
Ctrl+D Consolidated View
Ctrl+E Plain View
Ctrl+H Hide/show completed
Ctrl+K Show in Calendar
Ctrl+R Add to Root
Ctrl+Alt+Right Move in
Ctrl+Alt+Left Move out
Ctrl+Alt+Up Move up
Ctrl+Alt+Down Move down
Ctrl+Alt+C Collapse All
Ctrl+Alt+X Expand All

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In Notes:

Ctrl+R Add to root
Ins Add as Child
Ctrl+I Add as Sibling
Ctrl+Alt+Right Move in
Ctrl+Alt+Left Move out
Ctrl+Alt+Up Move up
Ctrl+Alt+Down Move down
Ctrl+Alt+C Collapse All
Ctrl+Alt+X Expand All

while creating a new Note
Ctrl+D insert current Day
Ctrl+T insert current Time

In Contacts:

Ctrl+G Add Group
Ctrl+H Hide/show groups

In Mail:

Ctrl+R Reply to Sender
Ctrl+Shift+R Reply to All
Ctrl+W Forward
Ctrl+M Send
Ctrl+Alt+A Send and Receive All
Ctrl+Alt+R Receive All
Ctrl+Alt+X Send All

In Passwords:

Ctrl+G Add Group
Ctrl+H Hide/Show Groups
Ctrl+Alt+U Copy User Name
Ctrl+Alt+P Copy Password

Synchronization

Ctrl+Alt+G Google
Ctrl+Alt+Y Yahoo
Ctrl+Alt+F myFUNAMBOL
Ctrl+Alt+O AOLSync
Ctrl+Alt+N GooSync
Ctrl+Alt+T Toodledo
Ctrl+Alt+M Memotoo
Ctrl+Alt+E Stylite/Egroupwere
Ctrl+Alt+H HighRiseHQ
Ctrl+Alt+D CalDav
Ctrl+Alt+L SyncML
Ctrl+Alt+W Windows Mobile
Ctrl+Alt+U Outlook

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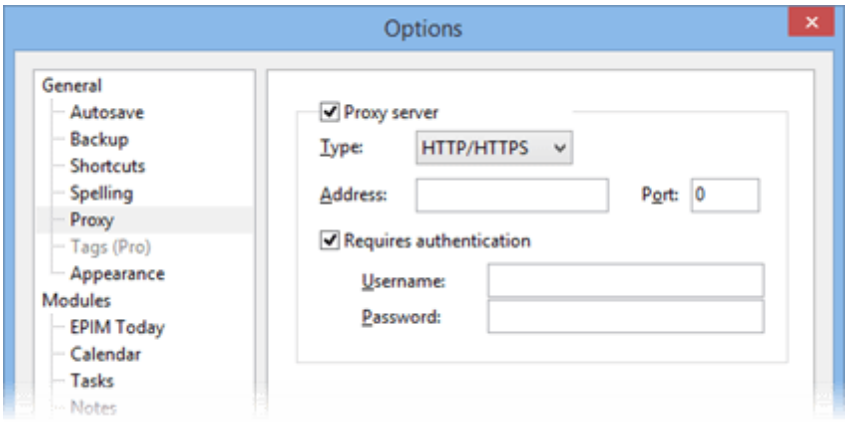
In text editing standard shortcuts are enabled: Ctrl+X, Ctrl+C, Ctrl+V, Ctrl+Y, Ctrl+A.

All shortcuts could be edited under **Tools -> Options -> Shortcuts** dialog.

4.17 Using proxy server

If your internet connection uses proxy then in order to perform synchronization with cloud services or receive mail you need to fill in the proxy server settings in EssentialPIM. Proxy server settings are available in **Tools -> Options -> Proxy.**



Proxy server - enables/disables use of a proxy server.
Type - allows to set a proxy server type: HTTP/HTTPS, SOCKS4 or SOCKS5.
Requires authentication - use only if your proxy server requires authentication, otherwise leave empty.

4.18 Security

EssentialPIM database file can be locked with a password. Data is encrypted using strong encryption algorithm. In addition, you can lock database on minimize of after a period of inactivity.

Setup a password

To protect currently opened database with a password navigate to **File -> Database Password**.

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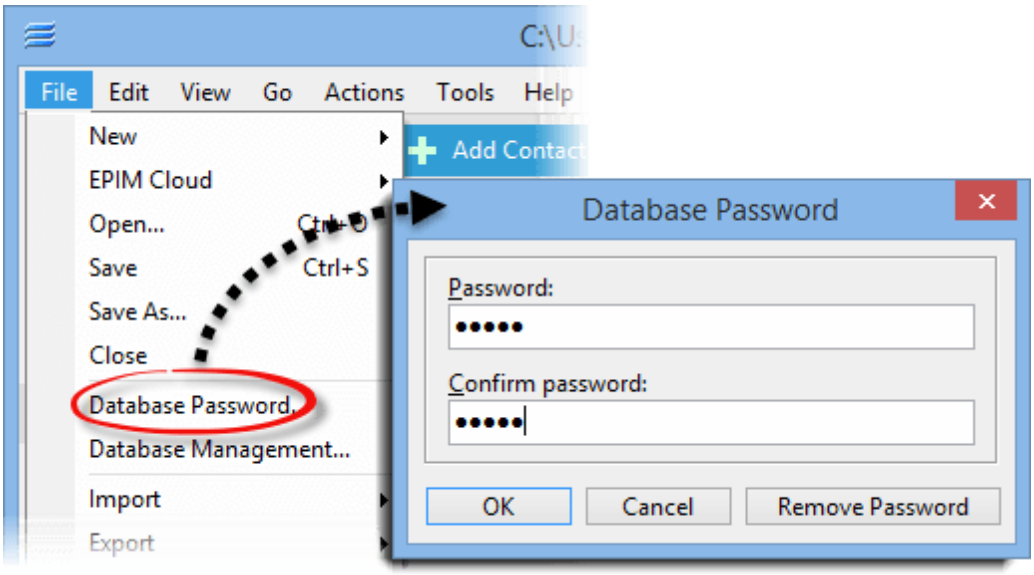
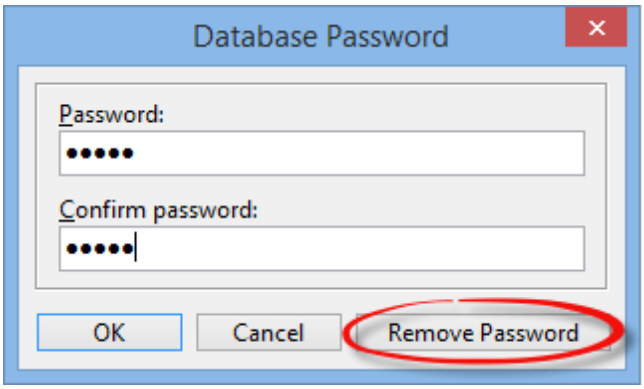


You need to enter your password twice and then select the encryption algorithm.

Once your database is encrypted, EssentialPIM will ask for a password each time upon opening the database file.
To remove password protection, navigate to **File -> Database Password** and enter the existing password. Once you do that, the following dialog window appears.



Click on the **Remove Password** button removes password protection from the database. You may also change your password and/or encryption algorithm in this window, if needed.

Password protection settings

Besides database protection on the program's start, it is also possible to additionally password protect data when program window is minimized of after a period of inactivity. These settings can be adjusted by clicking on **Tools -> Options -> Security**.

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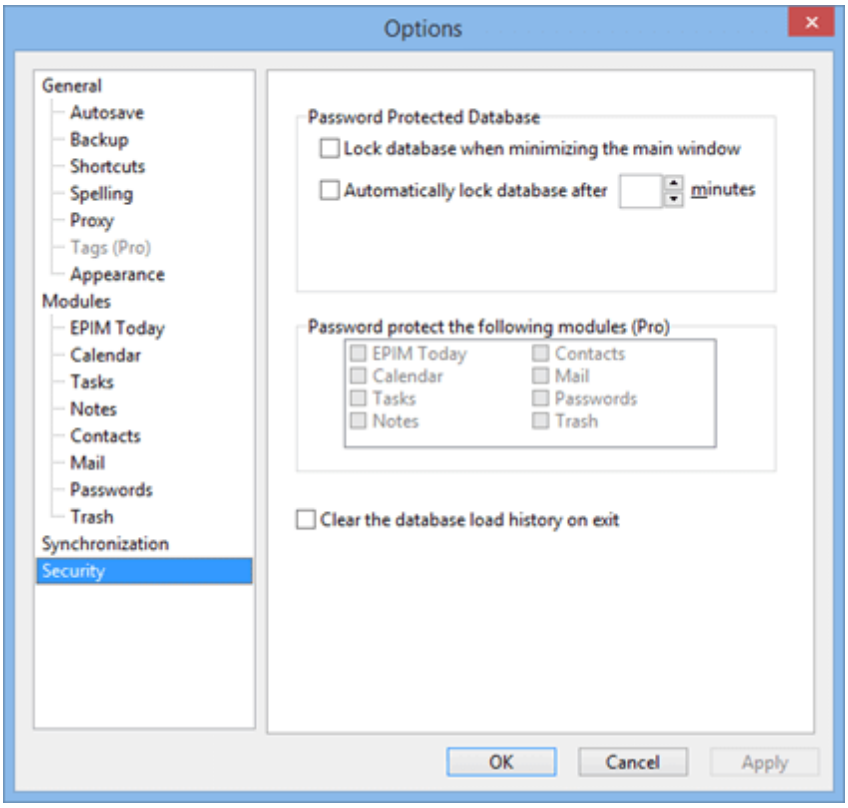

5 Information for translators

We welcome people to translate EssentialPIM's language file into their native languages. We used to provide translators with free EssentialPIM Pro licenses for their support.

Interface
Whole EssentialPIM's interface is contained in ENGLISH.LNG file, which is situated in EssentialPIM's installation directory. Please feel free to take the file and start translating. Usually it takes a couple of hours.

6 Upgrading to EssentialPIM Pro

There is a trial version of EssentialPIM Pro that is full featured, but works only for 30 days. By upgrading to EssentialPIM Pro, you will get:

- EssentialPIM Pro version you purchased forever. In addition, you are entitled to free updates during one year since purchase date.
- Priority support via email
- Newsletter and tips for using EssentialPIM Pro

EssentialPIM Pro Desktop / Portable cost $39.95(US).

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Order EssentialPIM Pro

- Order EssentialPIM Pro ($39.95)
- Order EssentialPIM Pro Network Edition ($59.95)

You can buy using:

- Your credit card (all major cards are supported) via online secure form
- PayPal
- Purchase order
- Telephone or fax

For phone orders and order related questions, our Toll Free Number in the US is 1-877-353-7297. Internationally you can reach us at 1-(952) 646-5331.

Sales questions are welcome at epimsales@essentialpim.com.

6.1 Sales policy

Upgrades
By becoming a registered user you can use EssentialPIM Pro version you purchased forever. In addition, you are entitled to free updates during one year since purchase date.

Refunds
We have made our returns policy as simple as possible so that you will come back and shop with us again and again. We are so confident that you'll be satisfied with your software purchase, that we are offering a 30-day money-back guarantee.

If at any time during the first 30 days of using the software you have purchased, you find that the product is not or does not meet or live up to your needs feel free to contact us at epimsales@essentialpim.com and request a refund.

When requesting for refund, please provide the following information:

- Your full name
- Order ID number
- Date of purchase
- Brief reason for dissatisfaction

All refunds for credit will be issued to the credit card account that appears on the original order. All returns are subject to approval by our customer service department.

7 Support

Astonsoft Ltd. is committed to supporting its customers. Please feel free to browse through the below listed topics and find the most appropriate way to get your question/problem solved.

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7.1 FAQ

7.1.1 General

Q: How to make EPIM to start with another module?
A: If you disable "Start with EPIM Today" under Tools -> Options -> EPIM Today than EPIM will start with the last used module.

Q: How to find my database file?
A: EPIM stores all data in .epim database files. The default paths for EPIM databases are:
C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP
C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista, 7 and 8
You can find path to your file at the top of EPIM window or under File -> Database Management.

Q: I've downloaded your EPIM but the installer would not work. What should I do?
A: This is because of incomplete download. Try to redownload installation file again. If it still tells that file is corrupted than most probably your browser or provider cached file and every time you are trying to re-download it gives you cashed incomplete file again. Try to clear browser cache or download with another browser or any download manager.

Q: Will my data preserve if I'll upgrade my EPIM Free to Pro?
A: Yes, but you'll need to open (File -> Open) your old base in Pro version manually. The default paths for EPIM Free databases are:
C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP
C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista, 7 and 8
You can find path to your file at the top of EPIM window or under File -> Database Management.

Q: Is it possible to run EPIM on Mac OS (Linux)?
A: Unfortunately no. Only Windows version available for now.

Q: I want to install EPIM to my smartphone. What version should I buy?
A: Desktop EPIM version runs on Windows desktop only and syncs with Windows Mobile, Android, iOS and Palm devices. Add synchronization under "File -> Add Synchronization". We also have Android and iOS versions.

Q: How can I access .epim database directly?
A: EPIM uses Firebird database engine. You can access database directly using any Firebird database manager. For example: http://www.mitec.cz/ibq.html Please note that you should understand how to work with database, otherwise data will be lost.

Q: My database size is much larger then backup file size. Does backup stores all my data?
A: Don't worry all your data is stored in backup. It is compressed.

Q: I have bought other computer but now I want to transfer all my EPIM program and data to this new computer - can you explain to me how to do this?

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A: You should install EPIM to a new computer. Then you need to transfer your database and open it in the new EPIM (File -> Open). You can always download EPIM installation file from our site: http://www.essentialpim.com

Q: How can I transfer data to EPIM from another PIM?
A: Data can be transferred via supported by EPIM formats only. You can find all supported formats in File -> Import menus.

Q: How to sort records by...
A: All EPIM items can be sorted by any field. Click on a field caption in order to sort by it. Holding Ctrl button allows sorting by several fields.

Q: Is there a way to export in one file all EPIM settings?
A: Yes, all settings are stored in EPIM.ini file which is stored here: C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP C:\Users\User_name \AppData\Roaming\EssentialPIM - for Vista, 7 and 8. Portable version stores this file in its program

Q: How to change/remove database password?
A: Do the following to remove or change password: 1. Go to File -> Password protection 2. Enter your password and press OK 3. Press Clear or enter new password in appeared dialog

Q: EssentialPIM can not open database from a shared disk
A: EPIM Free can't open database file over the network. You need EPIM Pro or EPIM Pro Network (if you want to share file with several users) for this.

Q: I've forgotten my database password. How can I recover it?
A: Unfortunately it's not possible to recover database password.

Q: How to print Calendar in color?
A: This feature is not available in Free version.

Q: After upgrade, will my data be preserved?
A: Yes, your data is stored in *.epim file and will be automatically converted to the new version format.

Q: How do I restore Backups?
A: Backups are just *.epim files, named "file name_backup_year_month_day_time". They can be opened from within EPIM using File -> Open menu.

Q: This morning I've opened PIM and all my entries disappeared. What do I do now?
A: Most probably EPIM "forgot" the path to your base because of some failure. Try to look for your base in the most recent files list in the File menu. Or try to locate and open (File -> Open) your base manually. EPIM stores all data in .epim database files. The default paths for EPIM databases are:
C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP
C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista, 7 and 8
If you can't find it anyway than try to search *.epim files on your computer.

Q: Can I request a feature?
A: Yes, of course. We try to really attentively listen to the users - that's how

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EssentialPIM is being developed. Please post your request on our Support Forum.

Q: Can I help make EssentialPIM better?
A: Yes, you can translate EssentialPIM into your native language or suggest a feature.

Q: EPIM became very slow. How to boost performance?
A: First, empty trash and run optimization under "File -> Database management".
If it doesn't help then create a new database under "File -> New -> EPIM Data File" and save it. Then sync it with your file using EPIM Synchronizer tool which could be downloaded from our site - http://www.essentialpim.com/get-epim
Then open newly synced file under "File -> Open"

Q: I have created a password, but how can I change my password?
A: You need to go to File -> Password protection, erase asterisks and enter your new password.

Q: Password protection or Optimization option is not active
A: EPIM can't utilize database management tools while mail send/receive processes are active. Disable "Check mail on start" option and restart EPIM. Password protection and Optimization options will be active then.

Q: How to delete/archive old records from database?
A: We have a special tool for this - EPIM Archiver/DupeRemover. It can delete or archive items older then particular date. Tool available from our download page - http://www.essentialpim.com/get-epim

7.1.2 Calendar

Q: How to add national holidays to calendar?
A: You can import holidays as iCal (.ics) calendar which can be downloaded from Internet.

Q: How to generate a list of upcoming birthdays and/or a list of all birthdays.
A: You should switch calendar to Table view, filter tasks according to Birthday (Holiday) category and set date ranges. You'll get your list then.

Q: Is there a possibility to make a text search, among all appointments scheduled in the current period?
A: Yes, switch to Table view, then you can make search by keywords and set date limits.

7.1.3 Notes

Q: Internet links doesn't work in Notes. The link become blue when I enter it, but nothing happens when I Click on it.
A: Click links holding on Ctrl button.

7.1.4 Contacts

Q: How can I delete unnecessary fields from contacts?

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A: Open any contact, select the field you want to delete and press "Delete field" button.

Q: Is it possible to add additional anniversaries to contact i.e. wife's birthday or any other?
A: Yes, open any contact and press "Add field" button then set Date Field type. EPIM will create recurring task for this event the same as for birthdays then.

Q: How to add/remove columns to display in Contacts view?
A: Right-click columns caption and choose fields to display.

Q: How can I add/edit field(s) in contacts?
A: Open any contact and press "Add field" or select a field and press "Edit field" correspondingly.

Q: How can I change fields order in Contacts?
A: Just drag them in preferred order with left mouse button.

Q: Some fields are not listed in Contacts table (main view) and some are not necessary. How to set to display needed fields?
A: Right-click on field name caption and choose fields to display from context menu. Pressing on Costumize option in the right-click menu opens a dialog where you can adjust fields set.

7.1.5 Mail

Q: "Socket Error # 10060 Connection timed out" error
A: Make sure that all servers setting were set correctly under "Tools -> Account Settings -> Edit -> Servers Settings"
If you are not sure about what to enter then login to your account via web interface and refer to Help area. Search for POP3/IMAP (for incoming mail) and SMTP (for outgoing mail) settings through FAQs.

Q: How to make mail available offline for IMAP accounts?
A: IMAP accounts download headers only by default. Press "Manage Folders" button from Actions panel and choose what folders to download fully. Those folders contents will be available offline then.

7.1.6 Potable version issues

Q: I want to upgrade my U3 version but can't find it on your download page?
A: Sorry, U3 version won't be supported anymore. You can install version for regular drives. Download the ZIP file and unzip it on your flash drive and run EssentialPIM.exe. Launchpad icon could be added with this tool - http://www.softpedia.com/reviews/windows/Shortcut-Creator-4U3--Review-76269.shtml

Q: My EPIM is very slow on my USB stick. How can I boost it up?
A: EPIM speed depends on your USB stick speed. Try to empty Trash and delete old unnecessary items. You can also try to Optimize database (File -> Database

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management -> Optimize). These measures should boost performance. Try also to reformat USB drive.

Q: Can I use portable EPIM as the desktop EPIM?
A: Yes, sure just unzip Portable version to a hard drive and run EssentialPIM.exe from program folder.
Note, portable version can't be a default mail client.

7.1.7 Synchronization issues

Q: Is it possible to sync Desktop and Portable calendar?
A: Yes, we have a special EPIM Synchronizer tool for this. It's available from our download page - http://www.essentialpim.com/get-epim

Q: I've got duplicates after synchronization/import. How to remove them?
A: We have a special tool for this - EPIM Archiver/DupeRemover. It's available from our download page - http://www.essentialpim.com/get-epim

7.2 Update

EssentialPIM automatically checks for updates once a week. If an updated version is found, you'll be notified. To check for updates manually, click on **Help -> Check For New Version.**

Note, you can always download the latest version of the program from our Web site - www.essentialpim.com

7.3 Troubleshooting

If you experience any problem with EssentialPIM, please follow these steps to find a solution:

- Make sure that you have installed the latest version
- Visit our online support community forum at www.essentialpim.com/forum
- If you still have not found the answer, do not hesitate to contact us at epimsupport@essentialpim.com

8 Contact

Please do not hesitate to contact us:

By e-mail
For general information please e-mail us at epiminfo@essentialpim.com
For sales information please e-mail us at epimsales@essentialpim.com
For technical support please e-mail us at epimsupport@essentialpim.com

By phone *(Please note, we do not provide support over the phone)*

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