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Overview

NameBase is a program that keeps track of names, addresses, phone numbers, dates, notes and other miscellaneous data about persons and organizations. A unique feature allows you to organize entries into any category you wish, then view these categories separately or combined.

You can assign a person to any number of categories, yet enter their data only once. You can display all records in all categories, or just a specific category.

NameBase includes a feature that lets you specify any criteria to further limit the records displayed, using Structured Query Language (SQL) syntax to specify which records you want. You can then view, edit, or print just the records you selected. You can also search for any string of characters in all records.

NameBase lets you sort on any field. You can edit a record in a spreadsheet-like grid or on a separate edit screen. Many fields have user-customizable screen labels.

Various printed reports are included. There are address books in different sizes, from full-size to pocket-size. You can specify the font, font size, and starting position for mailing labels and envelopes.

NameBase uses a Microsoft Access database, so it is easy to access your NameBase data using many Microsoft products such as Word, Excel, and Access. You can even write your own reports. Mail merge is a snap using Microsoft Word.

Categories



You can assign each record to a category which you previously created. You can then view and print just the records in that category. You create a category by clicking on the Category button and adding a new category. You can display just the records in that category by double clicking on the category name on the same screen.

Note:

If you are displaying records in a certain category, any records you add are automatically assigned to that category.



To assign a record to a category, highlight the record you want on the main NameBase screen, then click the Assign button. The Category Assignment screen appears. Double-click on a category in the box on the left side of the screen, and that category will be assigned to the current record. Double-click on a category in the box on the right side of the screen and that category assignment will be removed from the current record. You can assign a record to as many categories as you want.

The Clipboard



Copying a complete Name and Address:

Clicking the Clipboard button copies the Name and Address from the current record to the Windows Clipboard. You can also hold down the Ctrl key and press the letter "N" to do the same thing. If the current record has two addresses, the first address (the one on the left-side of the edit screen) is copied, unless the "Use for labels?" box is checked on the second address (the one on the right side of the edit screen). In that case the second address is copied.

The complete name, consisting of Name Prefix, First Name, Middle Name, Last Name, and Name Suffix are copied to the Clipboard, along with the Organization if one exists. All of the address lines are also copied to the Clipboard.

After copying the Name and Address to the Clipboard, you can paste this text into any Windows application by simply holding down the Ctrl key and pressing the letter "V". The entire Name and Address will appear at the cursor location. This is especially handy if you are using a word processor to write a letter to someone, and you want to include their Name and Address in that letter.

Copying only selected text:

To copy only selected text to the clipboard, first select the text by highlighting it with the mouse (hold down the left mouse button while moving the mouse over the text) or the keyboard (hold down the Shift key while pressing the left or right arrow keys). Then hold down the Ctrl key and press the letter "C". This will copy the selected text onto the Window Clipboard. Paste the text using the Ctrl-V key combination described in the previous paragraph.

Compact Database

Note: The compact program is only supplied with the fully registered version of NameBase.

Periodically, especially if you delete a lot of records, you should click on the **Compact Database** icon in the NameBase program group. Compacting your database removes any fragmentation, deletes unused areas within your database, and usually makes the database file smaller.

The Compact process creates a new, compacted copy of your database file and calls it NAMEBASE.NEW. It then renames your old database file to NAMEBASE.BAK. Then it renames NAMEBASE.NEW to NAMEBASE.MDB. This insures that if something goes wrong with the process (highly unlikely!), a copy of your old database still exists, and simply needs to be renamed back to NAMEBASE.MDB using either Windows File Manager or the DOS rename command.

Because this process creates a second copy of your database, you need to have enough space on your disk to hold the second copy.

Contacting the Author

You can contact the author of NameBase as follows:

By U.S. Mail:

Michael Paulick
P.O. Box 935
Conifer, CO 80433
U.S.A.

CompuServe id:

70640,1614

Internet address:

70640.1614@compuserve.com

Phone support is not offered except in very special circumstances, and then only if invited to call collect in the evening. I currently work another full-time day job, and I cannot return phone calls. Although I would love to personally talk to my customers, please be aware that I am a one-man company, and time and expenses make this difficult. I respond promptly to all e-mail and letters. I do not have a VISA or MasterCard merchant account, so I cannot accept credit cards.

Convert NameBase DOS to Windows

Note: The conversion program is only supplied with the fully registered version of NameBase.

If you are currently using the DOS version of NameBase, click on the **Convert NameBase DOS to Win** icon in the NameBase program group. Make sure you specify the location of both your DOS NameBase **NAME.DAT** file and your NameBase for Windows **NAMEBASE.MDB** file. The conversion program will copy all of your data into the Windows version of NameBase.

Your old NAME.DAT file will not be changed in any way. You can still use the DOS version of NameBase after the conversion. Just be sure you do not re-run the conversion a second time unless you delete all previously converted records and all previously converted categories from the Windows version. Otherwise you will end up with duplicate records and duplicate Categories.

Customizing Field Descriptions

On the NameBase edit screen (the screen displayed when you click the View/Edit or Add buttons), you will notice that the text which describes certain fields is displayed in [blue](#). This text describes the two addresses, five phone numbers, five dates, and two User Fields. You can change this text by selecting it (clicking) with the mouse, deleting the existing text, then typing your new description.

For example, you might want to change "Second Address" to "Work Address", or "Phone 4" to "FAX". NameBase will remember this change for the current record only, so you can customize these descriptions for each person in your database. Make sure you save the record after making a change.

Envelopes



Printing your first envelope:

To print envelopes, click the Envelope button. Prior to printing your first envelope, make sure you tell NameBase whether to print envelopes in **Landscape** or **Portrait** orientation, depending on how your printer handles envelopes. To do this, click on the **Options** menu, choose **Report Options**, then choose **Envelope Orientation**. You only need to do this once, unless you change printers. You should also specify your return address, and probably will have to adjust where the addresses print on the envelope. To do this, see below.

Return Address:

Before printing envelopes, you will want to tell NameBase what to print in the return address portion of the envelope. To do this, click on the **Options** menu, then choose **Return Address**. You have three options for return address printing. You can specify two different return addresses, such as Home and Work. You can also choose not to print any return address. You can easily switch between these three options by just clicking the one you want on the Return Address screen, then click the "**Save and Exit**" button.

You can change the descriptive labels above each return address to indicate which address it is. Simply type over the blue text above each address.

Adjusting where the addresses print on an envelope, and changing Fonts:

You will probably have to adjust where the addresses print on your envelopes. To do this, click on the **Options** menu, choose **Report Options**, then click the mouse on **Envelope Main Address** or **Envelope Return Address**. The current print position settings will appear, and you can change them on this screen. You can also change the Font Name and Font Size for both of these addresses.

Filtering records



To view only certain records in your database, click the Filter button. The "Specify Record Filter" screen appears. A record filter is simply criteria you specify to limit the records displayed.

If you are familiar with SQL, this should be easy. Just specify a SQL WHERE statement, leaving out the word WHERE. If you're not familiar with SQL syntax, it's still easy! Simply pick a field from the list, or type a field name in the box. After the field name, specify a comparison operator, such as =, <, >, <> (not equal), or **like**. Then enclose the value you want to compare the field to in quotes. For example, to show all people who live in Denver, your criteria would be:

First_City = "Denver" or Second_City = "Denver"

Notice the word "or" in the above example, which allows you to check for Denver in both the first and the second addresses in each record. This will display all records that have Denver in at least one of the two city fields in each record. If you substituted the word "and" instead of "or", you would only display records where **both** city fields in the same record were equal to Denver.

You use the **like** comparison operator together with asterisks * to find any combination of characters in a certain field. The asterisk serves as a wild card character. In other words, any character (or any number of characters) match the asterisk. So if you want to find all Last Names that start with "mac", you would specify the following criteria:

LastName like "mac*"

Putting the asterisk as the last character after "mac" means that all records whose LastName field starts with "mac" will be found. For example, last names such as "MacAllister", "MacDonald", or "Mack" will match this criteria. If you put the asterisk as the first character instead of the last (**LastName like "*"mac"**), any name **ending** with "mac" would be found, such as "Tarmac". Placing an asterisk at both the front and the back of a character string (**LastName like "*"mac*"**) will find records with "mac" anywhere in the LastName field, such as "Belmacelroy". This is especially handy for finding some word or phrase in the Notes field. You can also place the word "not" in front of the "like operator, such as **LastName not like "Mac*"**

Important:

If your criteria includes a date field, surround the date with pound sign symbols # instead of quotes. For example:

DateUpdated > #12/25/95#

Since the DateUpdated field also includes the time, this finds all records updated on 12/25/95 or later. The other date fields do not include the time, so criteria such as:

Date1 > #12/25/95#

will find all records with the Date1 field equal to 12/26/95 or later.

You must refer to each field name as it appears in the list on the right side of the Specify Record Filter screen. Even though you can rename the field labels on the NameBase edit screen, you must refer to them by their original names as shown in the list.

Find



To find a string of characters anywhere in your NameBase database, click the Find button, then type the string of characters you are looking for. NameBase will search all fields and all records in the entire database and then display just those records that contain the characters you specified. Since this requires a lot of searching, it could take some time if you have many records in your database.

NameBase searches all normal fields, but does not search the customized field descriptions you may have given to certain fields. These customizable descriptions are displayed in blue on the NameBase edit screen. For example, if you customize the second phone number description and call it "FAX", then search for the characters "FAX", NameBase will not find it. See the Help topic [Customizing Field Descriptions](#) for more information.

The Grid



Description:

The **Grid** is the section of the main NameBase screen which displays the records in your database. It is made up of rows and columns, and looks similar to a spreadsheet. Each row contains all of the data for each person in your database. Each column is a field in your database.

Changing the appearance of the Grid

You have a great deal of flexibility in configuring the appearance and behavior of the Grid. Many features are similar to a Windows-based spreadsheet like Microsoft Excel. These features are listed below.

Rearranging Columns:

You can rearrange the columns by dragging and dropping the column name to a new position. Position the mouse cursor over a column name (such as Last Name), then press the left mouse button and hold it down. Then move the mouse horizontally across the columns, and release the left mouse button when the column is in the position you want. This is called "dragging and dropping". The column will then stay in that position for the remainder of your NameBase session, but will revert to the original position the next time you start NameBase.

Resizing Columns:

To change the width of a column, position the mouse cursor on the right edge of the column until the cursor shape changes to a double-sided horizontal arrow. Then press the left mouse button and hold it down. Then move the mouse either left or right to decrease or increase the width.

Allowing/Disabling Grid Editing:

There is an option on the **Edit** menu to **Allow Grid Editing**. When you choose this option, you can make changes to your data directly on the Grid. When you choose this option, the menu selection changes to **Disable Grid Editing**, and choosing this will turn off this feature. When Allow Grid Editing is enabled, you can edit your data by first clicking once on a record on the grid, so that row is highlighted. Then move the mouse cursor to the field you want to change, and click once. The field will change color, and you can type a new value in that field. You can press the Esc key prior to moving the cursor off that field to cancel your change. When you move the cursor off that field or row, the changed field will be saved.

There are a few fields, such as the Date Updated field, which appear on the Grid but cannot be changed.

Locking a column in place so it doesn't move when you scroll

Suppose you want to view or edit a column that is on the right-hand side of the grid. When you scroll to the right, you can no longer see the Name and Organization fields that help you identify which record you are dealing with. To solve this problem, you can split the grid in two so that you can see the fields that help you identify the record (such as the Last Name column) on the left-hand side of the grid, while scrolling the right-hand side of the grid independently. To do this see the next section, called "Splitting the Grid".

Splitting the Grid

You will notice a small rectangular black box (called the split box) which appears at the leftmost boundary

of the horizontal scrollbar. In other words, this box is in the bottom left corner of the Grid. When you move the mouse cursor over this box, notice that the cursor shape changes to a downward facing arrow attached to two vertical lines. Once the mouse is positioned over this box, drag and drop this cursor to the right. Dragging is defined as pressing and holding down the left mouse button while moving the mouse. Dropping is defined as letting up on the left mouse button after the mouse is positioned where you want it. Drop the cursor where you want the split to occur.

After dragging and dropping the split box, you will notice the Grid now appears as two grids side by side. You can now scroll each side of the Grid separately. This lets you position a column such as Last Name on the left side of the Grid, while then scrolling to another column on the right side of the Grid. You can reposition the split by dragging and dropping the new split box that appears when you create a split.

You are **not** limited to just two splits. You can create as many splits as you need by dragging and dropping the left-most split box. This allows you to have three, four, or even more independantly scrollable regions on the Grid. This is very handy if you need to view certain columns that are not located right next to each other.

You can eliminate the split by dragging the split box all the way to the left. The splits will also go away when you end NameBase and start it again.

Locate

To locate any record in your database, make sure the cursor is on the Locate box on the main NameBase screen, then simply type a character in that box. NameBase will highlight on the Grid the first person it finds whose Last Name starts with that character. If you type a second character, NameBase will find the first person whose Last Name starts with those two characters. You can continue to narrow the search by typing more characters of the Last Name.

If no person in your database matches what you typed, the current record highlighted on the Grid remains the same.

The above example assumes that you have not changed the sort order, so your records are sorted by Last Name. If you change the sort to another field, the Locate function will search whatever field you have sorted by.

If you sort by a Date field, NameBase does not try to locate a record until you have finished typing a valid date. A valid date does not have to contain the year. If you type **12/3** NameBase will start searching for December 3rd of the current year.

Note:

Refrain from typing double quote marks (") in the Name or Organization fields, or in any field you intend to sort by and use the Locate feature with. The Locate feature ignores double quotes, so typing a double quote in the Locate field will have no effect. Certain special characters (like * and #) are also ignored.

Multiple Users and Multiple Databases

Use on a LAN

NameBase for Windows works great on a Local Area Network (LAN). Multiple users can all share the same database simply by specifying the database name in the command line used to start NameBase (see below). Record locking is handled automatically by the Microsoft Access database engine.

Important:

Use on a LAN requires an individual payment to the author for each person using NameBase. If you have more than 10 users, a site license is available. Contact [Michael Paulick](#) for pricing.

Multiple Databases or Multiple Users Sharing the Same Database

Normally, your NameBase database is located in the **C:\NAMEWIN** directory, and the name of your NameBase database is **NAMEBASE.MDB**.

Most users will not want to change this. However, in some cases you may want to have several people sharing the same database, or multiple NameBase database files in different directories on your hard drive, while still having only one copy of the NameBase program. This can be accomplished by specifying the full path name (drive, directory, and file name) of your NameBase database on the command line used to start the NameBase program.

For example, the normal command line used to start NameBase is:

C:\NAMEWIN\NAMEBASE.EXE

Note that there is nothing on the command line after the program name NAMEBASE.EXE.

If you have a second NameBase database in another directory called MYNAME, then you can use the following command line to start NameBase using this second database:

C:\NAMEWIN\NAMEBASE.EXE C:\MYNAME\NAMEBASE.MDB

Note that the location and name of the NameBase database is listed on the command line after the program name. The program location and name is the same, but by specifying the location and name of the database file NAMEBASE.MDB after the program name, NameBase uses the database in directory MYNAME rather than the one in directory NAMEWIN.

Similarly, you can specify the location of the NAMEBASE.MDB file on your LAN file server if you want several people to share the same data.

The command line referred to above is located in the Program Item Properties window in the Microsoft Windows Program Manager. If you have never created a new Program Item or never changed Program Item Properties in Windows, you should enlist the help of someone more experienced with Windows, or refer to your Windows Users Manual.

The Phone



Before dialing a phone number:

Click on the **Options** menu, then choose **Modem Port**. Select the serial communications port your modem is connected to. This should be either COM1, COM2, COM3, or COM4.

The **Dialing Prefix** is usually **ATDT**. This is the command that tells your modem to dial. If you need to dial 9 to get an outside line, you can change this to "**ATDT9**," (without the quotes, but including the comma). You can put any string of commands after the ATDT that your phone system or modem may need.

To use the dialing feature, you need to have a phone line connected to your modem, and a telephone connected to your modem.

Displaying a list of phone numbers and dialing the phone:

To dial a phone number, or to simply display a list of phone numbers for the current record, click the Phone button on the main screen, or the small phone icon on the edit screen. A list of phone numbers will appear. Double-click a phone number from the list, and your modem will dial that number. Pick up the telephone handset, then click anywhere in the dialing box. This will disconnect your modem from the phone line, letting you talk from the phone. If you click in the dialing box before picking up the phone handset, the phone will hang up.

Repair Database

Note: The repair program is only supplied with the fully registered version of NameBase.

In the unlikely event that your database is damaged, you can attempt to repair it by clicking on the Repair Database icon in the NameBase program group.

A database can become damaged due to a sudden loss of computer power while the program is performing an update operation. A computer hardware problem can also cause damage.

Only certain types of problems can be corrected by the repair program. Therefore, make sure you always have a recent backup copy of your **NAMEBASE.MDB** file.

Reports



To print reports, click the Reports button or select the Reports menu. A list of available reports will be displayed. Select the report you want from the list by clicking it with the mouse.

Labels:

You can change the print position, font, and font size for labels. To do this, click on the **Options** menu, choose **Report Options**, then choose the label from the list. The print position, font name, and font size will be displayed. Make any changes you want, and click the "**Save and Exit**" button.

The 1-up labels are continuous form and designed for pin-feed dot matrix printers. Since no page-feed is sent to the printer, you will get an overflow error if you print these on a page-feed printer and you try to print more than one page at a time.

The 2-up and 3-up labels are designed for page-feed laser and ink-jet printers. If you use the 2-up or 3-up labels, make sure you get labels designed for laser printers, not labels designed for copiers. Labels designed for printers have a 1/2-inch margin at the top. Labels designed for copiers do not have this margin, and thus will not line up.

The Pocket Address Book:

The Pocket Address Book prints four 1/4-size pages of name/address information on each side of every sheet of 8-1/2 x 11-inch paper. Since most printers cannot print on both sides at once, it is designed for printers that print on one side only. Therefore, NameBase prints half of the pages on one side, then pauses and asks you to turn the stack of printed paper over. After you tell it to continue, it prints the rest of the pages on the opposite side.

The page numbers will appear to be out of order. However, you must cut each sheet of paper in two (along the 8.5-inch width) and fold these half-sheets in half. When you assemble these half-sheets into a little book by page number, each quarter sheet is a page in the book, and the page numbers will be correct. You can then staple this book along the fold, in order to bind it.

Printing Envelopes

See the separate Help Topic for envelopes.

Selecting Records

If you want to display specific records by individually choosing each record from a larger list, you can do this easily. Just position the mouse cursor to the extreme left of the Grid on the record you want to select. The mouse cursor will change to a check mark when it is positioned in the correct spot. Then simply click the mouse once and that record will be selected. You can then display just the selected records by pressing the button which says: "**Show Selected Records Only**". The Edit menu has additional options for hiding all selected records and for removing all selection marks.

Show All Records



To display all records in your NameBase database, click the **Show All** button. This is useful if you previously limited the records displayed by choosing a specific Category, or by specifying a Filter or Selecting Records.

Sorting

To sort your list of names in a different order, just click on the "**Sort by**" box on the main screen. A list will appear showing most of the fields in the database. Select a field name by clicking it with the mouse. Your list will then be rearranged based on the contents of the field you selected.

View/Edit or Add a record

To **View or Edit** an existing record in the database, double-click the row on the Grid which displays the desired record, or click the **View/Edit** button. The next screen which appears displays and lets you change all the data for the selected record. This screen is referred to as the Edit screen.

To **Add** a new record to the database, click the **Add** button. The next screen which appears allows you to add new data for all the fields in a record. This screen is also referred to as the Edit screen.

The Edit screen contains certain text displayed in blue. These are screen labels which you can change. See the Help Topic Customizing Field Descriptions for more information.

Use for labels? Check Box

On the right-hand side of the Edit screen next to the second set of address fields, there is a check box with a description that says: **Use for labels?** Leaving this box unchecked tells NameBase to print the first address on labels. The first address is the one on the left-hand side of the Edit screen. Checking this box tells NameBase to use the second address (the one near the check box on the right-hand side of the screen) to print on labels. You check and uncheck this box by clicking it once with the mouse.

Capitalize Check Box

On the bottom left of the Edit screen is a check box with a description that says: **Capitalize**. Checking this box tells NameBase to apply proper-name capitalization to the name and address fields. This means that the first letter of each word in the name and address fields will be capitalized as you type. Unchecking this box means that you will have to hit the shift key any time you want a letter capitalized. This option is only active as you type; it does not change any text already entered. When changing existing data, capitalization may not occur due to other characters already being in the field.

Print notes Check Box

On the bottom left of the Edit screen is a check box with a description that says: **Print notes**. Checking this box tells NameBase to print the contents of the Notes field on any report that prints notes. Unchecking this box tells NameBase to not print the contents of the Notes field for this record. This is especially useful if you have some confidential information that you do not want printed on an address report. This option effects the Notes for this one person only.

The Tab, Enter, and Up/Down arrow keys

The Tab, Shift-Tab, Enter, and Up and Down arrow keys move the text entry point (the text cursor) from field to field. However, when in the Notes field, the Enter and Up/Down arrow keys move from line to line within the Notes. The Tab key still moves the cursor out of the Notes field. To indent a line within the Notes field, hold down the Ctrl key and press the Tab key.

The Code field

The Code field is included for compatibility with previous versions of NameBase, and can be used for whatever you desire, just like the two user-defined fields above it.

