

FileMaker Pro

Using FileMaker Pro with
Microsoft® Office

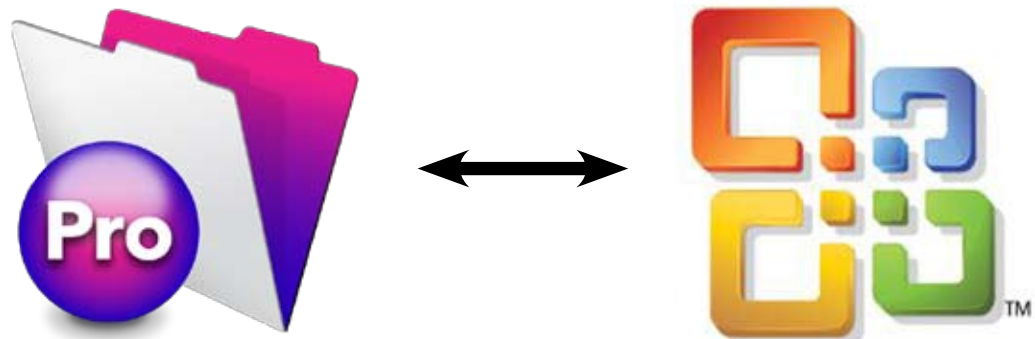


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Introduction



FileMaker software works well with the Microsoft Office line of products. With FileMaker Pro you can take a simple estimate, schedule, or contact list you created in Excel and drag and drop that file onto the FileMaker Pro application icon and it will automatically create a database in FileMaker Pro. You'll then be able to search, sort, share and prepare reports using that data instantly - and without having to re-key a thing!

Are you creating individual letters, invoices and mailing labels by hand? Save yourself countless hours by integrating Microsoft Word and FileMaker Pro. By storing all your contacts, assets, and inventory records in FileMaker Pro, you can easily produce customized letters and labels by pulling information from FileMaker Pro into Word without having to type individual letters and invoices or duplicate data entry.

And you can use FileMaker Pro as a digital library for all your PowerPoint presentations as well as your Word and Excel documents and files that you use over and over again. By keeping frequently used templates, graphics, tables, and charts organized in a database, they'll be instantly searchable and more easily accessed by you and anyone you choose.



THINGS YOU CAN DO FASTER AND EASIER IN FILEMAKER PRO

- > **Manage** customer, client, and vendor details with complete searchable detail
- > **Access**, track, and collaborate with colleagues on projects and tasks
- > **Track** and manage inventory, products, and assets
- > **Organize** and archive pictures, video and other multimedia files or create your own digital asset tracking solution
- > **Produce** customized reports with eye-catching charts and save as PDF or Excel formats
- > **Print** invoices, letters and mailing labels
- > **Send** targeted mailings to customers
- > **View** live web information linked to your data within your database
- > **Set up** live two-way connections to your organizations SQL data
- > **Share** databases with Windows and Mac users simultaneously over the network or across the web.

Before You Get Started

You will need a copy of FileMaker Pro installed on your Mac or Windows computer. You can get a free 30-day trial copy of FileMaker Pro at www.filemakertrial.com. On this site, you should also download the free FileMaker Business Productivity Kit which contains fully working business database templates which you can either start to use immediately, or customize for your own business needs.



www.filemakertrial.com



Let's Get Started!

Sharing Data between FileMaker Pro and Microsoft Excel

Strengths of Excel	Strengths of FileMaker Pro
<ul style="list-style-type: none">• Storing and analyzing data in lists• Analyzing and modeling data• Producing charts and graphs• Building a financial model• Creating basic reports	<ul style="list-style-type: none">• Viewing information in list, form, or table view• Storing and managing virtually any type of information (<i>words, images, numbers, files</i>)• Creating and publishing customized forms and reports• Connecting related information such as inventory and sales• Access by multiple people at the same time

If you're using Excel to manage your data, you may think you have all the information management you need. Think again. You can instantly transform your Excel spreadsheets into rich, powerful solutions that you can customize to suit your needs:

- ▶ Performing searches
- ▶ Printing professional quality reports
- ▶ Importing and storing images, video, PDFs, PowerPoint presentations, etc.
- ▶ Tracking projects, contacts, inventory
- ▶ Publishing information to the web
- ▶ Sharing data across a workgroup regardless of platform

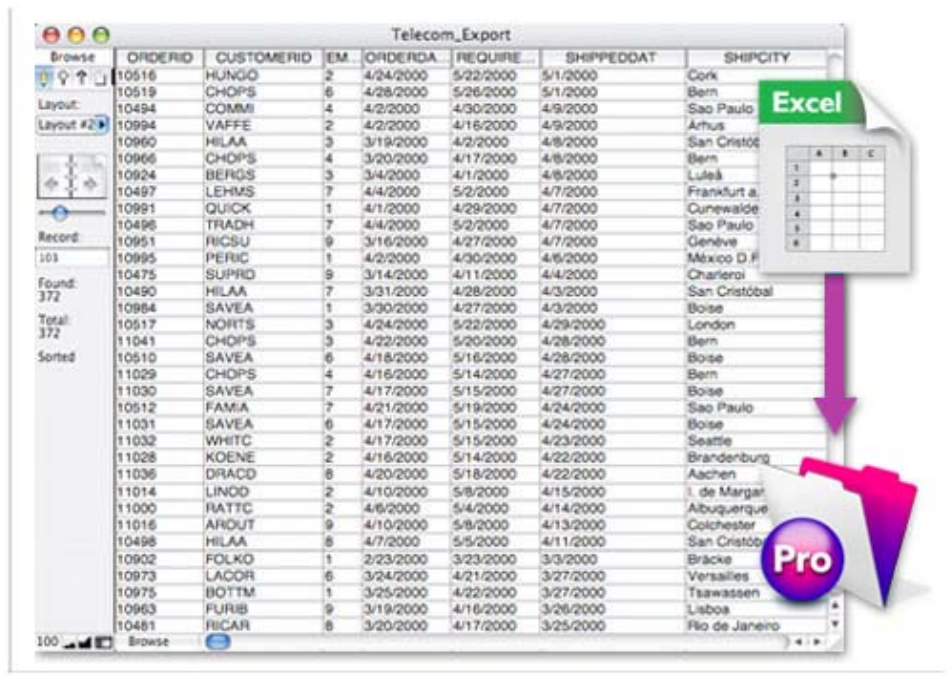
With FileMaker Pro, you can instantly transform your Excel spreadsheets into richer, more powerful database solutions that let you perform searches, sort data, import images, create reports, add links, resize columns, and more - by simply dragging and dropping your Excel spreadsheets into FileMaker Pro. It really is just that simple.

EXERCISE 1: DRAG AND DROP IMPORT

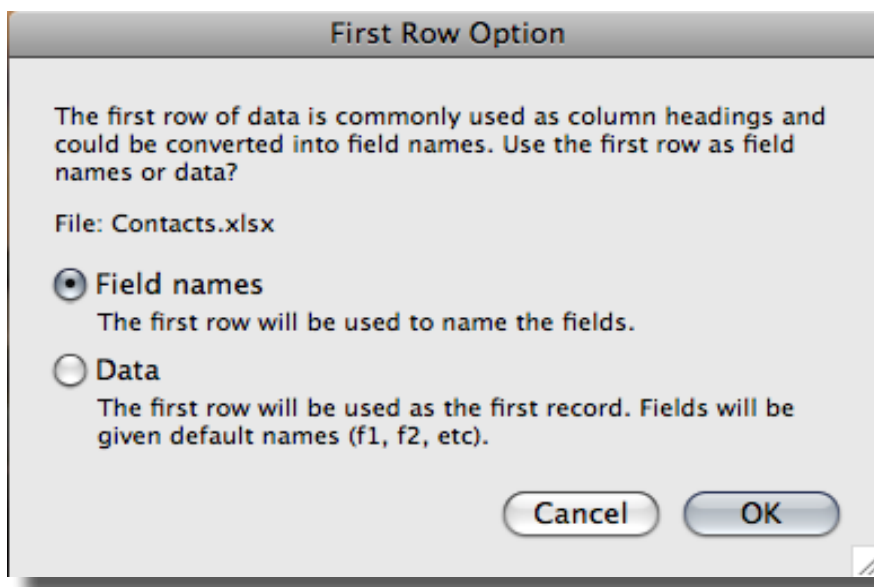
There's no need to re-enter the information you have stored in Excel or any other spreadsheet. You can easily import your information following these simple steps.



1. With your spreadsheet file closed, simply drag the Excel file onto the FileMaker Pro icon.



2. In the First Row Option dialog box, choose whether the first row of data contains field names or the first record of data, then click OK.



3. In the Create a New File Name dialog box, type a name for the new file, choose a location, then click <Save>.

The screenshot shows the FileMaker Pro interface with a table titled "Contacts Converted 2". The table has the following columns: Name_First, Name_Last, Company, Email, State_Province1, Postal_Co..., Website, Phone1, and Title. The data is as follows:

Name_First	Name_Last	Company	Email	State_Province1	Postal_Co...	Website	Phone1	Title
Mike	Abney	Western Inc.	mabney@um.edu	TN	38238	www.filemaker.com/	213-777-6673	Technician
Paul	Acciaravalli	My Cafe	zendog@lokyo.com	HI	96720	www.filemaker.com/	916-443-5619	Accounting
Alethia	Achee	My Cafe	achee@rogersha.	AK	99054	www.filemaker.com/	916-443-5619	Tech Support
Elsaine	Adair	My Cafe	erbed@yahoo.com	MS	39501	www.filemaker.com/	916-443-5619	Sales Associate
Nicholas	Adams	My Cafe	njadams@mac.com	PA	18901	www.filemaker.com/	916-443-5619	Technician
Stephen	Adams	Home Corp.	sda52@hotmail.com	TX	77901	www.filemaker.com/	517-345-6717	Technician
Naiasha	Ahsian	My Cafe	naahsian@vismt.org	VT	05602	www.filemaker.com/	916-443-5619	Technician
Art	Allen	My Cafe	art@irpnet.org	UT	84097	www.filemaker.com/	916-443-5619	Technician
Tess	Anviso	Western Inc.	taa@wa-acte.org	WA	98507	www.filemaker.com/	213-777-6673	Technician
Sally	Anderson	Home Corp.	sally@andersondigita	AL	60188	www.filemaker.com/	517-345-6717	Tech Support
Steve	Anderson	Home Corp.	sanderson@home.	IL	60001	www.filemaker.com/	517-345-6717	Technician
Dorothy	Anderson	My Cafe	diaz@mac.com	NY	14618	www.filemaker.com/	916-443-5619	Technician
Mark	Andreasen	Western Inc.	mark@poeticpower.	UT	84321	www.filemaker.com/	213-777-6673	Technician
Greg	Anoder	My Cafe	GAnoder@mac.com	NM	87111	www.filemaker.com/	916-443-5619	Technician
Alan	Apel	My Cafe	alana@cyteimedia.	KS	666033310	www.filemaker.com/	916-443-5619	Technician
Christine	Appleby	Western Inc.	christine.appleby@f	CA	95054	www.filemaker.com/	213-777-6673	Tech Support
John	appleby	My Cafe	jwappleby@excite.	VT	05843-0606	www.filemaker.com/	916-443-5619	Technician
Frank	Aprile	My Cafe	earthist@attbi.com	MI	49445	www.filemaker.com/	916-443-5619	Sales Associate
Ron	Armstrong	Western Inc.	ron_is@bellsouth.net	NC	28801	www.filemaker.com/	213-777-6673	Technician
Nancy	Arnold	My Cafe	arnold_nancy@mama	AK	99519	www.filemaker.com/	916-443-5619	Technician
RICHARD	ARONER	Western Inc.	rckaroner@earthlink.	WA	98029	www.filemaker.com/	213-777-6673	Technician
Molly	As	My Cafe	mikera@sateo.com	AK	99504	www.filemaker.com/	916-443-5619	Technician
Mark	Astmann	Western Inc.	mastmann@yahoo.	NJ	07450-5522	www.filemaker.com/	213-777-6673	Technician
Verna	Avarell	My Cafe	voana@aol.com	CA	923210026	www.filemaker.com/	916-443-5619	Engineer

- ▶ You now have a FileMaker Pro file with the same information as your Excel file.

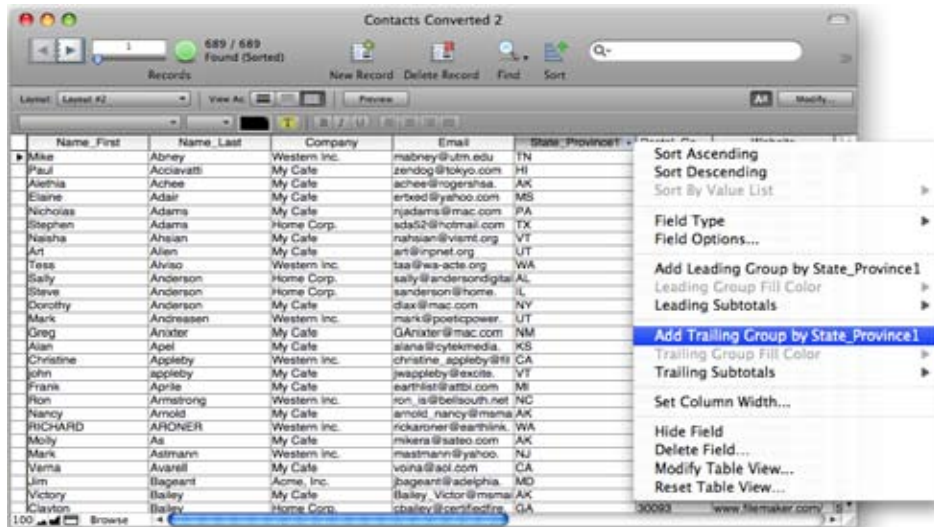
Once your Excel File has been converted to a FileMaker Pro file, you can now easily search and sort your data:

- ▶ Click on any header, and FileMaker Pro will automatically sort the data for you.
- ▶ Find information quickly by entering a word in the search box in the Status Toolbar. Easily search across all fields in your layout.
- ▶ Add or delete records instantly using the "New Record" or "Delete Record" icons.
- ▶ Add fields or columns just like you would in a spreadsheet.
- ▶ Resize or re-order any column by dragging the column header to the left or right

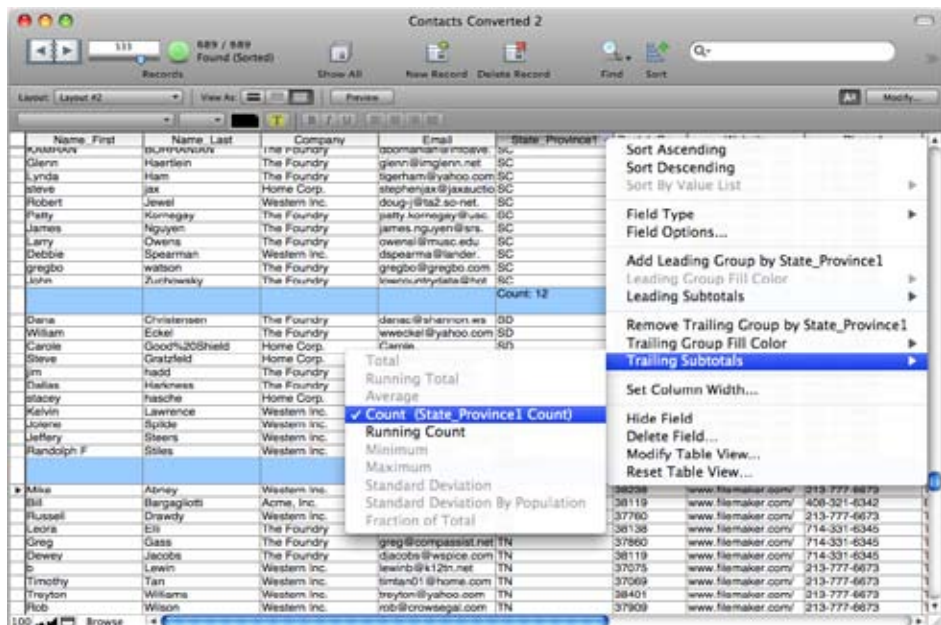
4. With your newly created FileMaker file, you can select any of the columns and easily move them around, sort them, and even use the drop down column menus to find sub-summary totals as shown in the following example.



- a. For this example, we want to find the total number of people in each state. To do this we simply click on the column menu on the State/Province column and select the [Add Trailing Group by State_Province] menu item.



- b. Next, select the column menu again and choose [Trailing Subtotals] and then [Count (State_Province1 Count)].



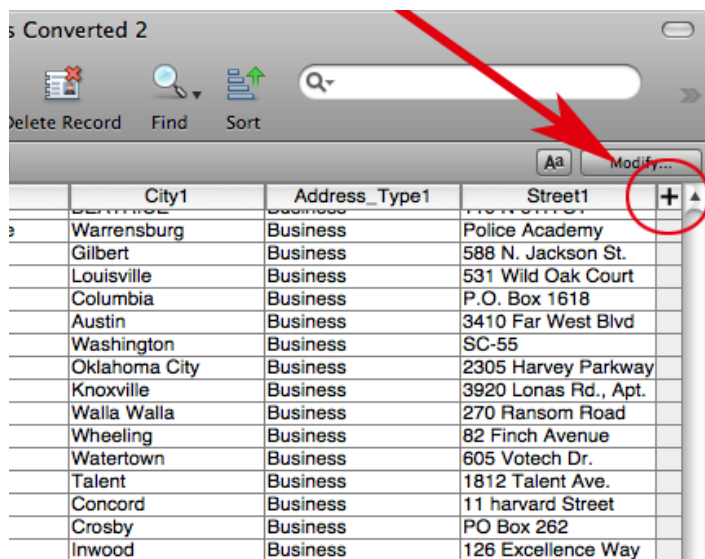
c. We now have a total count of the number of people in each state

State_Province1	Postal_Co...
AL	83642
AL	37206
Count: 2	
AZ	85034
Count: 1	
CA	95054
CA	94000
CA	95667
CA	92694
Count: 4	

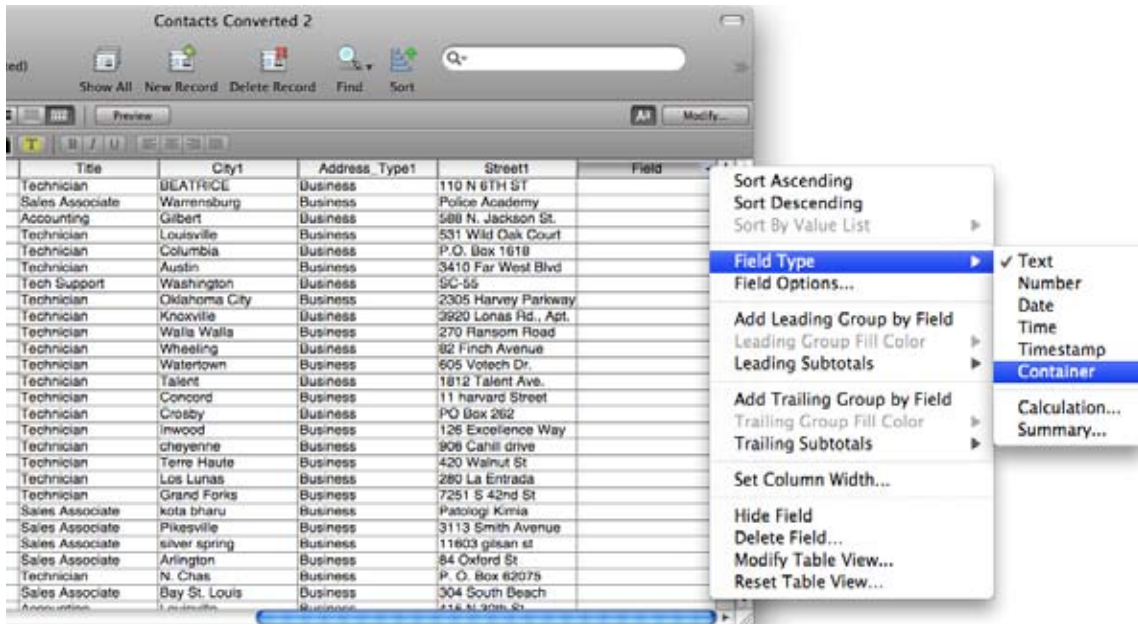
EXERCISE 2: VIEW YOUR DATA WITH DIFFERENT TYPES OF LAYOUTS

FileMaker Pro makes it easy to create layouts, forms, labels, and lists that look and work the way you want them to. Let's experiment with some new layouts and add a new field to our database.

1. To add a new field to your form, simply click on the plus sign [+] in the top right section of your table:

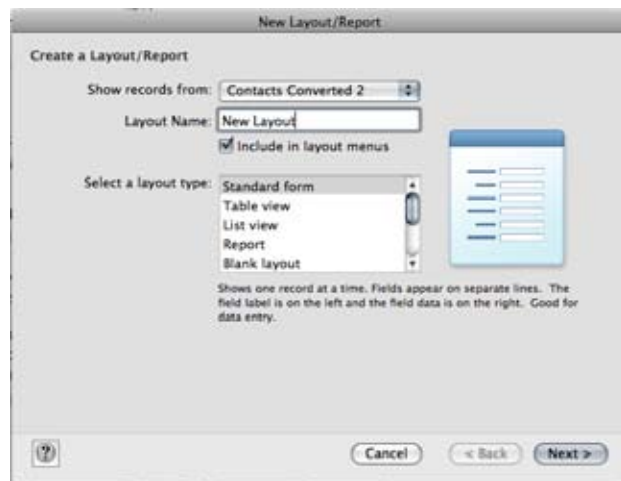


- Next, click in the new field box and click on the right hand arrow and choose [Field Type] and then [Container]. (See picture for example)

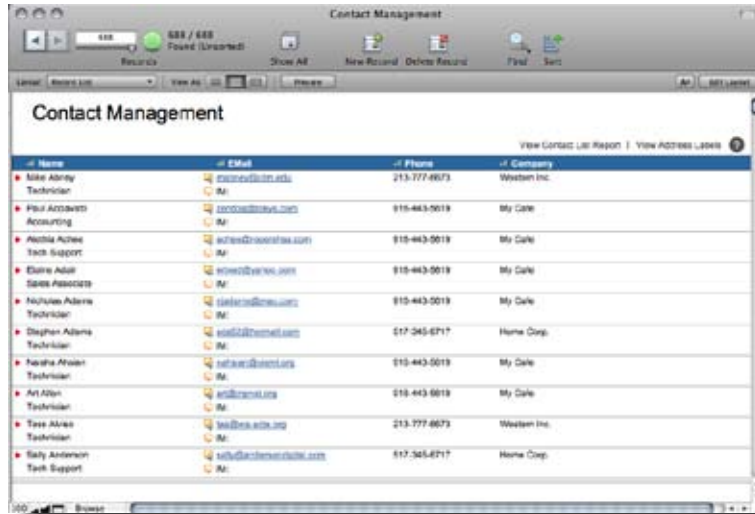


Now a Picture field has been added to your database's list of available fields, and now all you need to do is insert a picture to display.

- To create new layouts, simply use the "Layout/Report" button located in the top portion of the Layout screen (To get to the Layout screen, simply choose [View] then [Layout Mode] in the top menu bar).
- Click on the [New Layout/Report] button

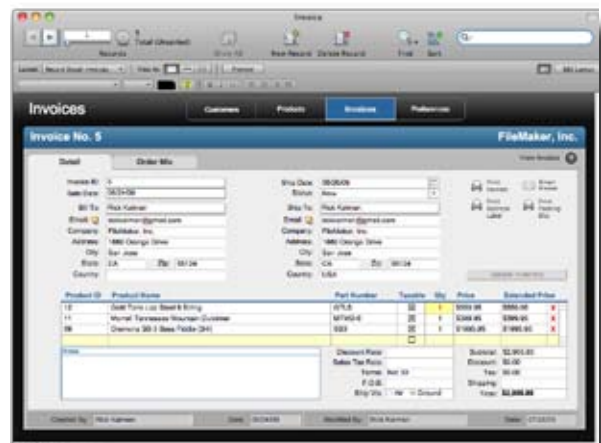


5. Choose the type of layout or report that you would like to create - Standard, Table View, Labels, custom. For this example, we're going to use "Standard form."
6. On the next screen, choose what information you want to appear on your layout and choose [Next].
7. Next, choose what theme or color palette you would like to use and then hit [Finish].
8. You now have a new layout which you can further customize in the Layout screen.



Sample layout made from the Layout/Report Assistant

Also be sure to check out the database templates that come free with FileMaker Pro. There are pre-designed, ready-to-use forms for managing contacts, tracking projects, organizing inventory, and other popular tasks.



Samples of the pre-designed ready-to-use forms



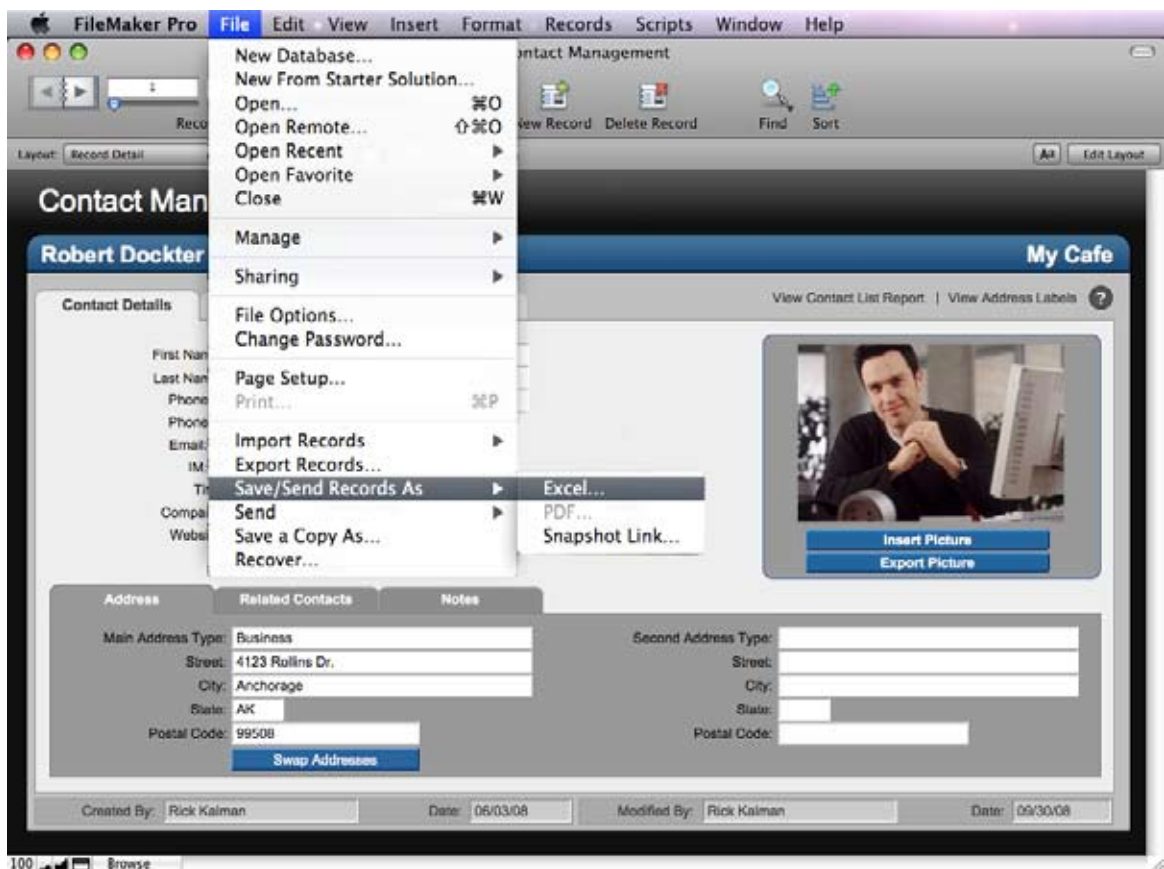
Exercise 3: Send data as an Excel file.

There are times when you'll want to save your FileMaker Pro data as an Excel file using the Excel Maker feature.

Excel Maker

Create Microsoft Excel workbooks from your FileMaker data right from within FileMaker Pro, for easy sharing and analysis by Excel users.

1. Choose "Save/Send Records As" from the File menu and choose Excel.



Save FileMaker data directly into an Excel file

2. To view Excel options, click the Options button in the Save Records As Excel dialog. For example, you can define the name of the worksheet, title, subject, author, or enter a description about the file.



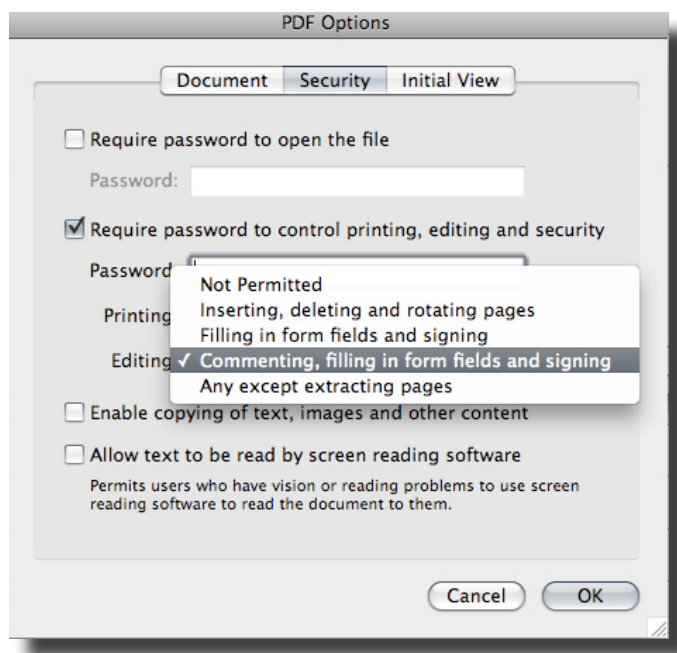
3. After saving, you can automatically open the file in Excel, and/or create an email with the file as an attachment, or both. Just select the appropriate options at the bottom of the Save As dialog box.
4. Excellent! Your FileMaker Pro data is now saved as an Excel file and presented in the familiar rows and columns format that Excel users appreciate.

Exercise 4: Save data as a PDF file.

PDF Maker

Securely share FileMaker data with people outside your FileMaker workgroup—even people who don't have FileMaker—by creating, printing, and emailing Adobe® PDF files.

1. Choose "Save/Send Records As" from the File menu and choose PDF to create a PDF file from all the records being browsed, the current record, or a blank form.



Share FileMaker data through PDF files

2. Click the Options button to access all PDF options available from within the actual Acrobat application: Document, Security, and Initial View. By selecting options on the Security panel, for example, you can control the right to open, print, or modify the document.



Sharing Data between FileMaker Pro and Microsoft Word

Using FileMaker as a Data Source for a Word Mail Merge Document

It is easy to add a new letter layout within a FileMaker Pro file and print a letter to a single customer, a specific group of customers based on search criteria, or all customer records in a database.

You may however have an existing letter template in Word that you would like to use as the basis of a mail merge document, using customer records that are held in FileMaker Pro. You can export a selected set of records from a FileMaker database, as a Merge file, which can be used as a recipient list for a Word mail merge document.

Step 1: Preparing a Letter for Mail Merging in Microsoft Word

Launch Microsoft Word and open your existing letter template document:

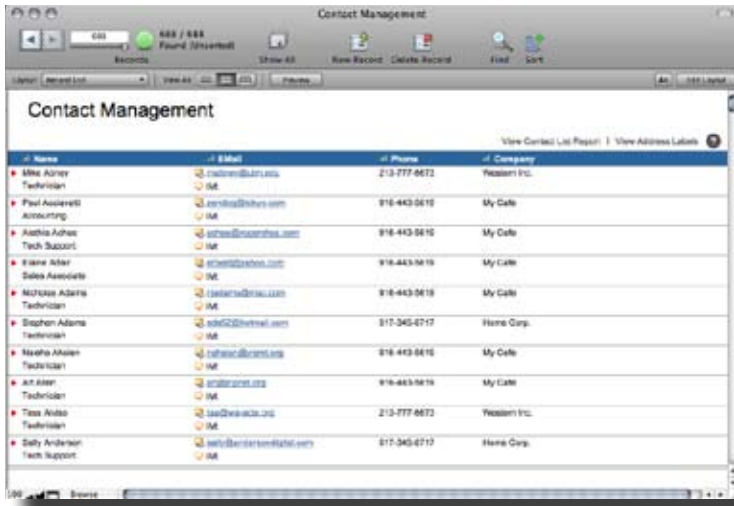


Figure 1: A sample marketing letter written in Word, ready for merge fields to be added.



Step 2: Creating the Merge Data File in FileMaker

You can export customer records in your FileMaker Pro database to create a new merge data source file. You can either select all records in your Contacts file to include in the new merge file, or reduce the list of recipients by searching for a specific group of customers.



When you are happy with your chosen set of records, select the menu option: **File > Export Records.**

The Export Records to File dialog box will appear. The file name and type options, are shown below. Type a name for the new exported records file. Click the down arrow to the right of the Save as type field and choose Merge Files from the list of file types. Choose a folder location to save the new merge file to, and click the Save button.

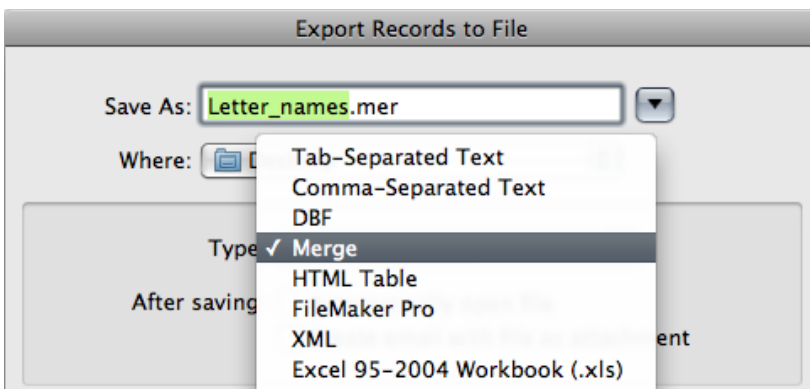


Figure 2: The file options in the Export Records to File dialog box.



The Specify Field Order for Export dialog box will appear. As a default setting, the list of fields displayed on the left, is based on the current layout. Highlight each of the fields you want included in your mail merge letter, and click the Move button each time. When you are happy with your selected fields, click the Export button. A new merge file will now be created in the location you select.

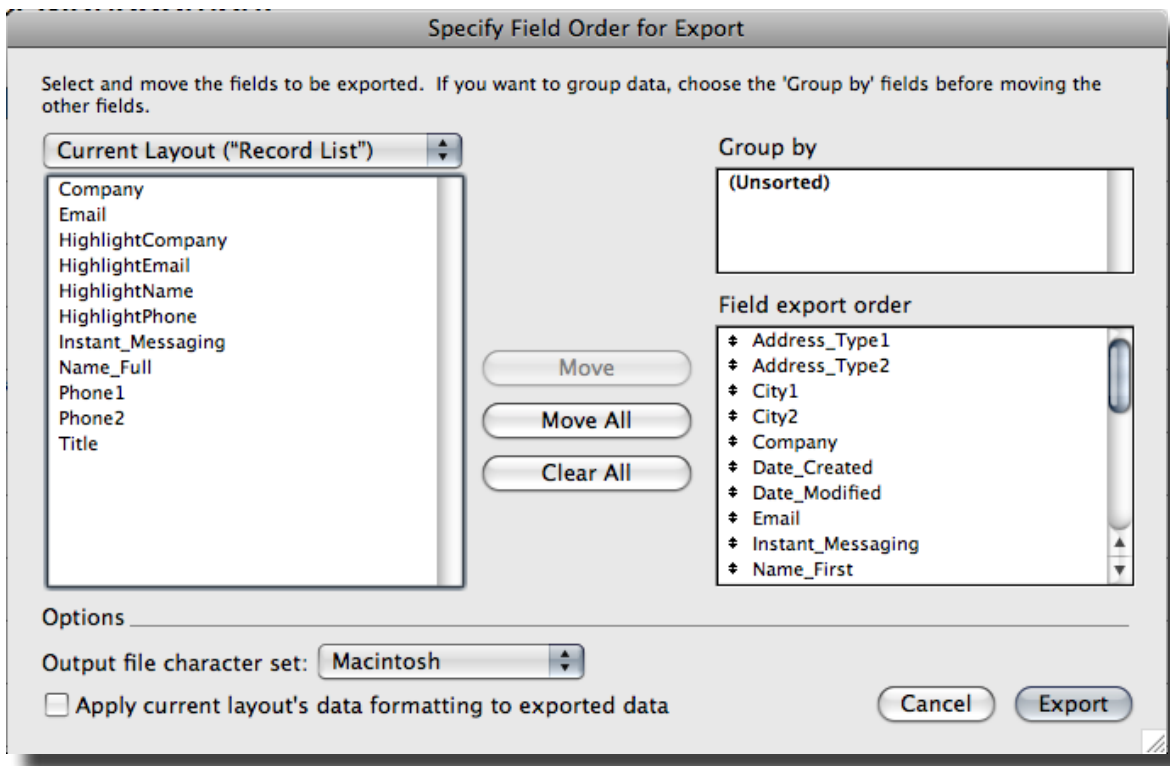


Figure 3: The Specify Field Order for Export dialog box.

Step 3: Linking the Merge Data File to the Merge Letter

Switch back to the letter document in Word and select the menu option **Tools > Mail Merge Manager, or Tools > Letters and Mailings > Mail Merge** depending upon which version of Microsoft Word you are using. The Mail Merge task pane will open. Use the hyperlinks in the task pane to navigate through the mail merge process. *[See screens below for process]*



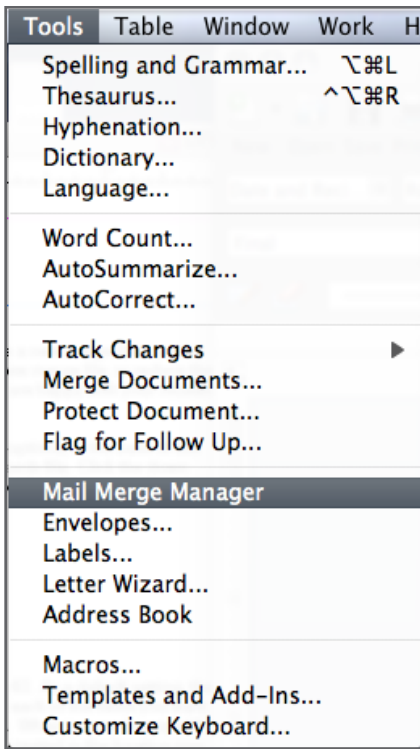


Figure 4: Selecting the Mail Merge Manager feature within Microsoft Word.

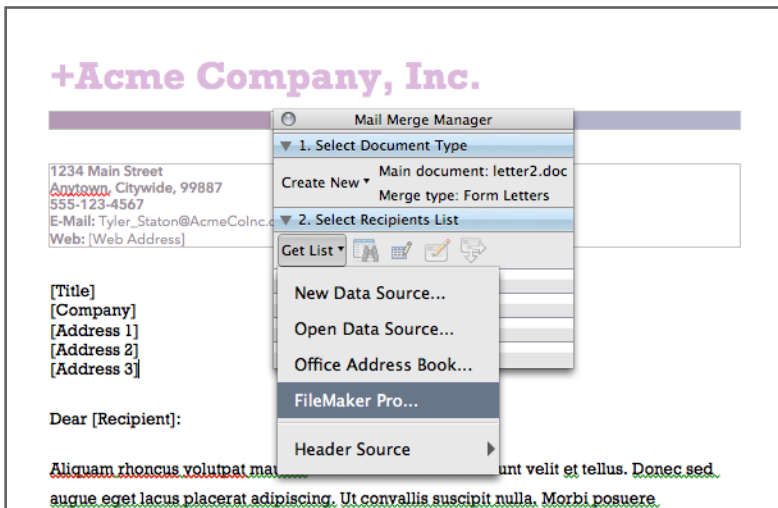


Figure 5: Select either "open data source" and choose your FileMaker Mail Merge document, or in newer versions of Microsoft Word, you can also choose FileMaker and link directly to your FileMaker database.



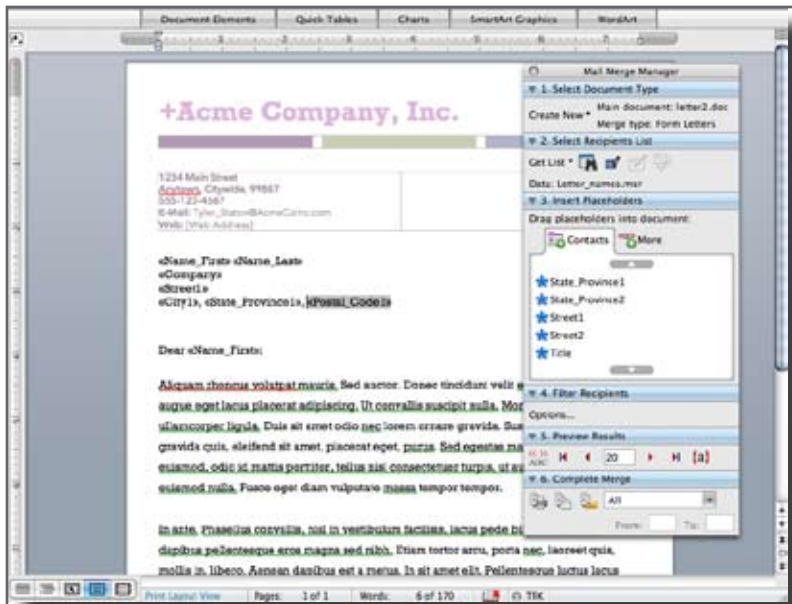


Figure 6: Drag and match your database fields to the address fields in your letter.

After fields are matched, preview the records then merge the data into your letter.

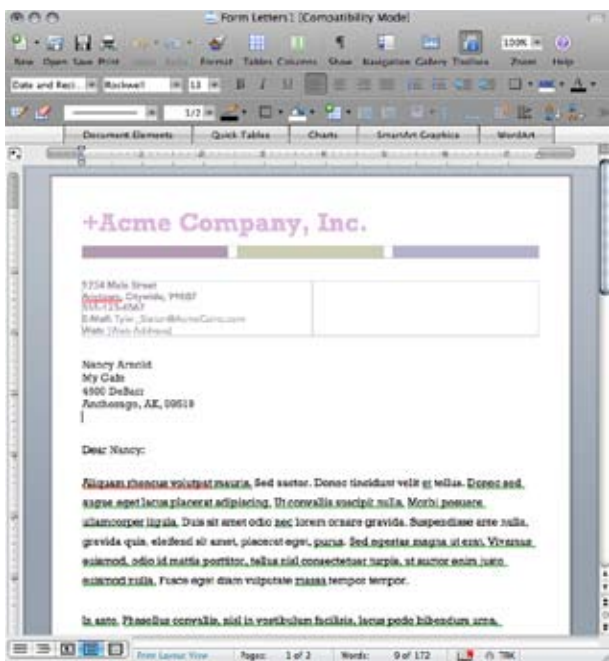


Figure 7: Final letter with merged data, ready for mailing.



Storing and Sharing Data between FileMaker Pro and all Microsoft Office Applications

Use FileMaker as an Asset Library to Store Office Documents

There are many professional firms using FileMaker Pro as an electronic asset library, to store business documents. You can store virtually any type of file in a FileMaker container field and if you have the original document application installed on your computer, you can open the file from within FileMaker.

Step 1: Opening the Document Library FileMaker Template

We can use the Document Library template that ships with FileMaker Pro, to build an example asset library file. Launch FileMaker Pro, and on the *Quick Start Screen*, choose the *“Use a Starter Solution”* section. Select the Document Library from the set of database templates, shown in Figure 1 below. Click the <Choose> button to create the new file.

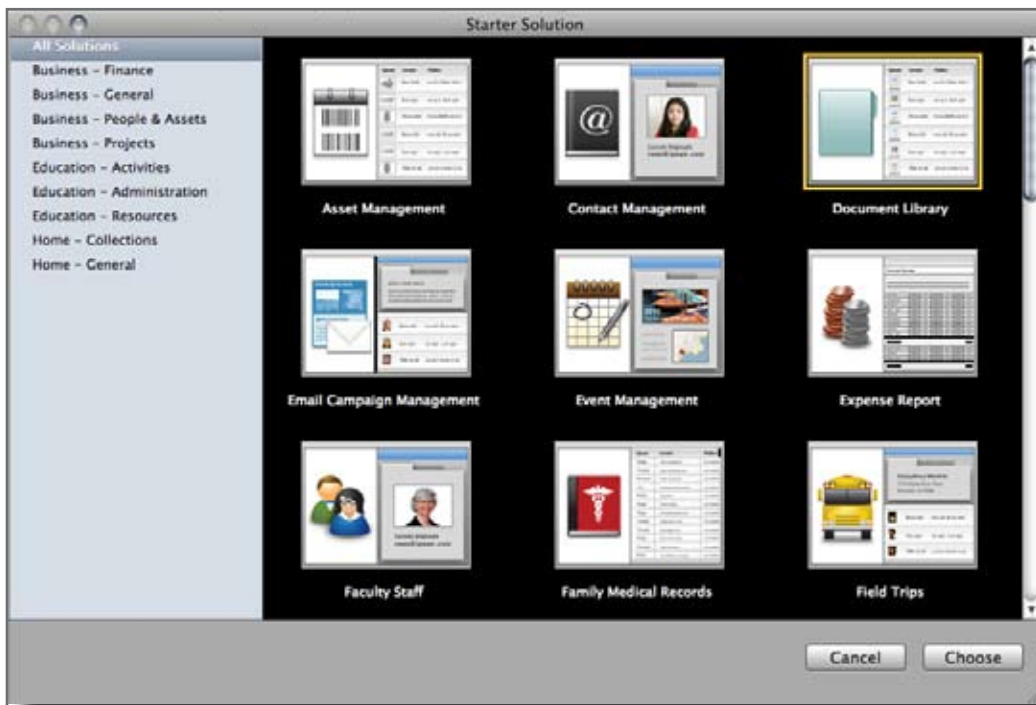


Figure 1: Select the Document Library template from the Quick Start Screen



Step 2: Inserting a File into the Document Library File

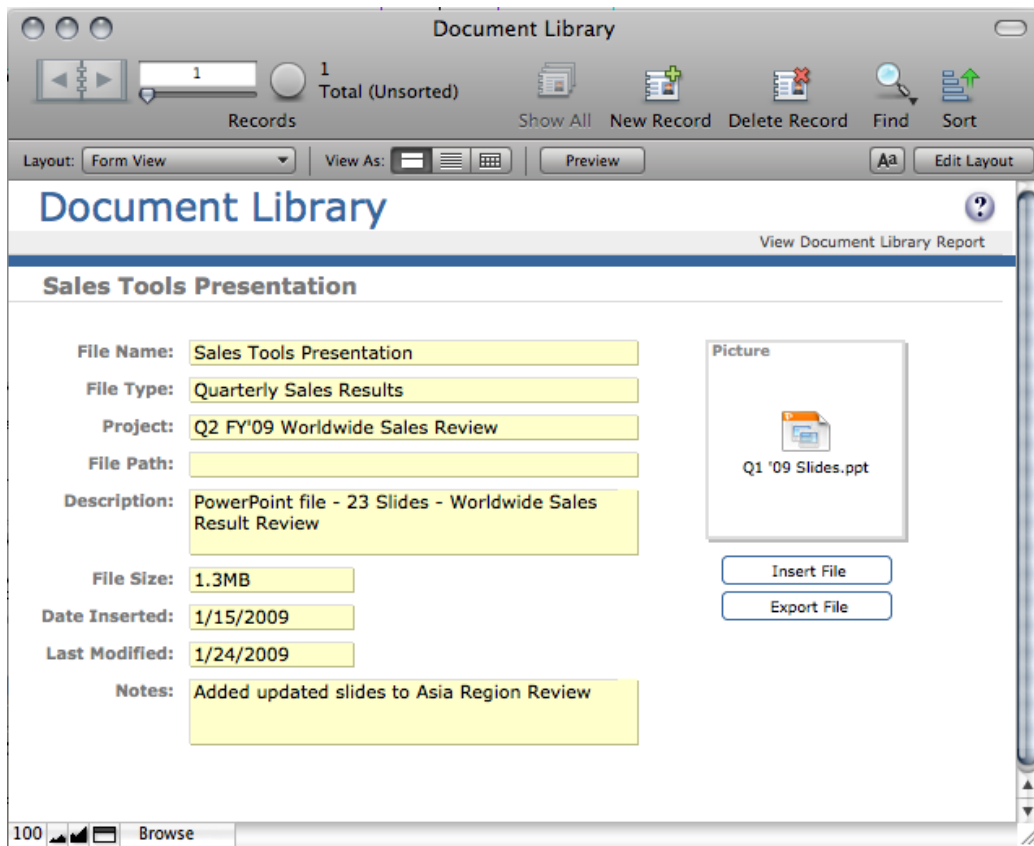


Figure 2: Use the Document Library file to store details on a PowerPoint Presentation

The Document Library Form View layout includes a container field displayed as a white rectangle with the label 'Picture' behind it. In addition to a description of the file, you can store the file itself, or a reference to it, within the container field. Click the container field and choose **Insert > File** from either the mouse menu, or the Insert menu. Use the Insert File dialog box, which then appears, to select the document that you want to add to the FileMaker record.

At the base of the dialog box there is a check box that gives you the option to store only a reference to the file, shown in Figure 3. If you select Store only a reference to the file, FileMaker Pro doesn't import the file, it only keeps track of where it is on your hard disk, saving disk space.



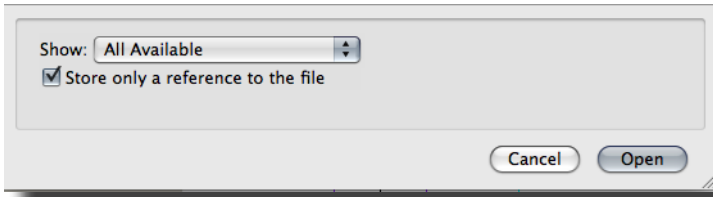


Figure 3: The file storage option within the Insert File dialog box

When needed, you can choose Export Field Contents from the mouse menu or the Edit menu to export a copy of the stored document.

Step 3: Inserting a Linked Object into the Document Library File

You may prefer to store the document in FileMaker Pro as a linked object. This method means that you will be able to launch the original file from within FileMaker.

Click the container field and select the Insert File option from the mouse menu or the Insert menu. The Insert Object dialog box will open, as shown in Figure 4. At the base of the dialog box be sure to check the box that gives you the option to store only a reference to the file. This will allow you to open the file within FileMaker Pro by simply clicking on the file in the container field

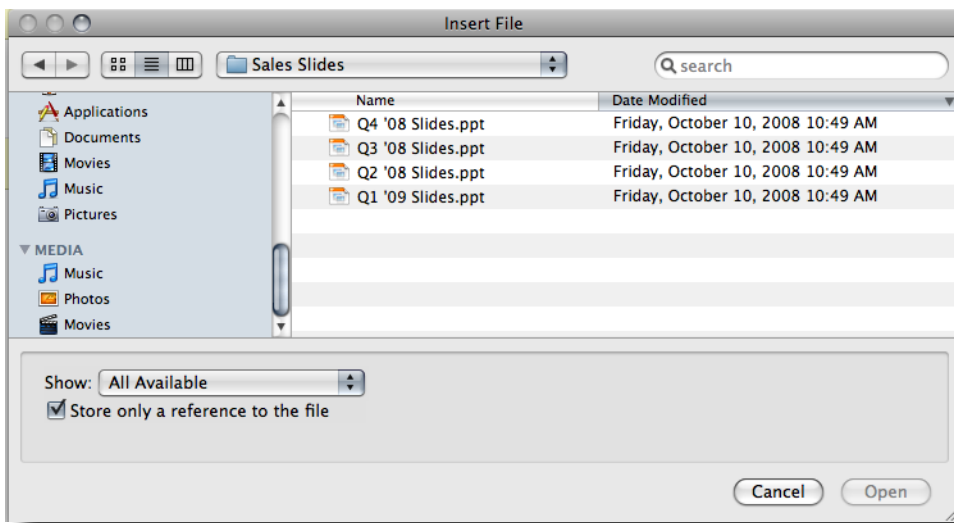


Figure 4: Use the Insert File dialog box to add a link to the original file in a container field



Using The Container Field

With the Container Field, you can add, store, and archive virtually any type of file or information you want to your database including images, movies, sounds, Microsoft Office files, Adobe PDF files and much more. Store several terabytes of information in any single database. Use FileMaker Pro to keep track of projects, inventory, contracts, and store the original Word, PDF, Excel, PowerPoint or JPEG files.

Sending data from FileMaker Pro to Microsoft Exchange, Outlook and Entourage

Part I Creating Emails From within FileMaker Pro

Using the Send Mail Command to Create Emails From within FileMaker Pro

It is quite easy to send email from within FileMaker Pro using the Send Mail button command. From the File menu in your database, select [Send -> Mail].

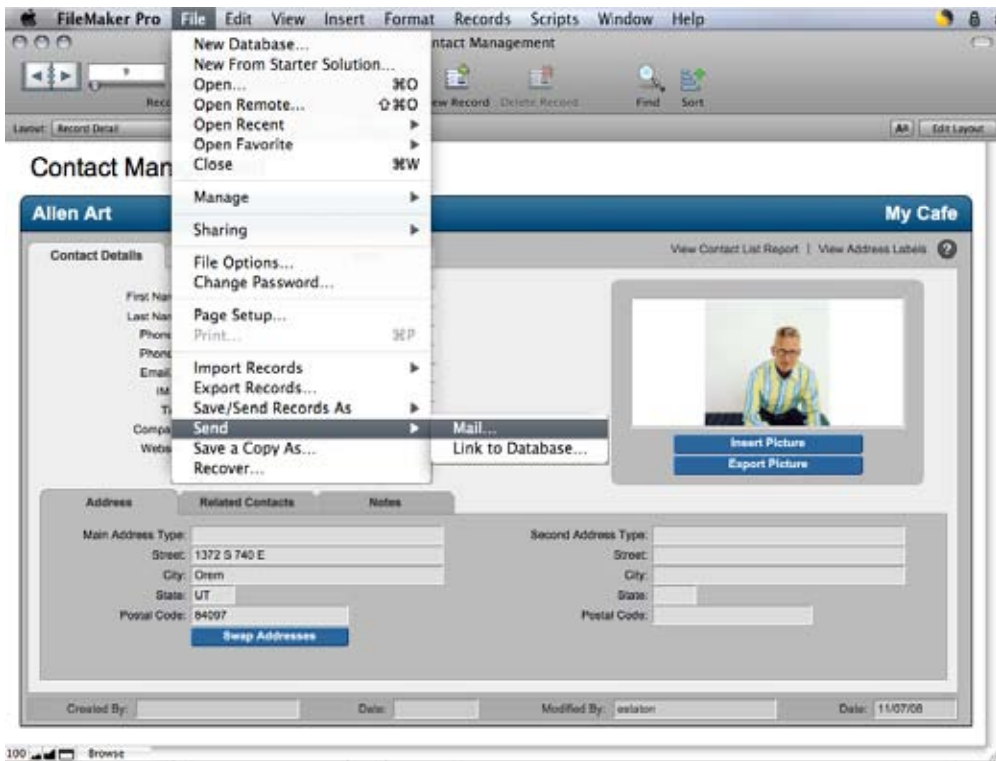


Figure 1: Selecting the "Send Mail" command within FileMaker Pro



Next, select the email field from your database, add in a subject line, message, and any file attachment that you wish to send.

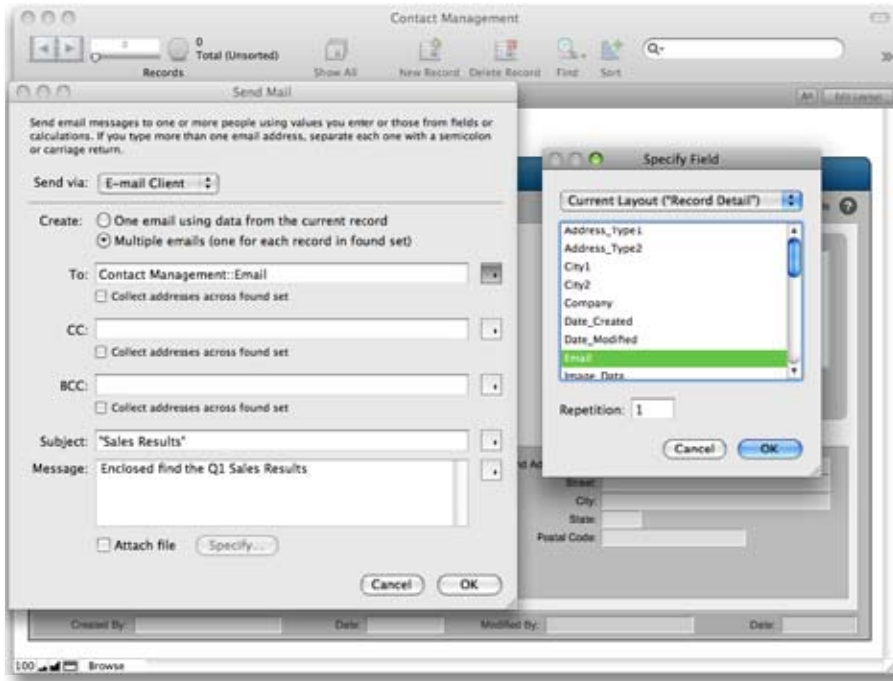


Figure 2: Selecting the "email field" to mail to.

Once all the fields are filled out, simply hit the "OK" button, and FileMaker will send the files and attachments to your email client out box.

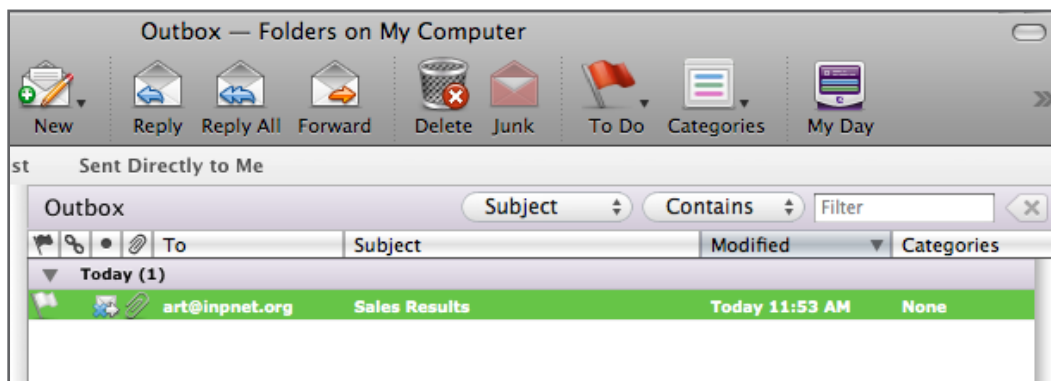


Figure 3: Email ready to be sent from the out box within the email client



Next Steps

Congratulations! You've taken the first step toward tackling any task - the easy way!

You might be interested in the free resources available on the FileMaker websites (www.filemaker.com and www.filemakertrial.com). These free resources include:

- Pre-designed, ready-to-use databases for common everyday information management needs.
- FileMaker Pro Resource Center that includes video tutorials, hands-on guides and other helpful information.
- Customer stories so you can read how others from around the world use FileMaker Pro to manage their information better.
- FileMaker News a monthly electronic newsletter containing notifications of software updates, tips and tricks for using FileMaker Pro in new ways, special offers, and more!

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