

User's QuickSteps for ebase™ 2.0 for FileMaker

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2.1 Login

1. Enter your user name in the "User Name" field.
2. Enter your password in the "Password" field.
3. Click "OK." This will take you to the Main Menu screen, which displays links to the various "regions" of ebase. NOTE: Depending on the privilege level established for your user account, you may not have access to all possible parts of ebase. However, all users have access to CONTACTS, the hub and central switchboard of ebase.
4. Click CONTACTS to begin using ebase.

2.12 Quit ebase

1. MAIN MENU-->QUIT.
2. Click either:
 - * "Quit ebase" to quit ebase without exiting FileMaker Pro
 - * "Exit FileMaker" to quit ebase and exit FileMaker Pro
 - * "Login: to login under a different user name and password
 - * "Cancel" to cancel the logout process.

3.1 Add Contact

1. On the left navigation bar, go to CONTACTS-->Add Contact.
2. ebase will ask you if you what type of contact you want to add--an organization, family or individual. Choose the most appropriate type of contact.
3. Enter the appropriate data in the contact name field. Click outside the field to have ebase check for duplicates. Note whether any existing contacts pop up in the Possible Duplicates area. If you find you are entering a duplicate, simply click "Cancel" to back out of the Add Contact process. Alternatively, you may click on the duplicate contact to work with that contact. Click the "OK" button if there are no duplicates.
4. If you have a street address for your contact, enter it in the "Delivery address" field. There is no need to enter city and state information. Click outside the field to have ebase check for duplicates. Note whether any existing addresses pop up in the Possible Duplicates area. If you find you are entering a duplicate, simply click "Cancel" to back out of the Add Contact process. Alternatively, you may click on the duplicate address to add it to your new record or you may click the "OK" button to ignore the duplicate.

5. You may now add the rest of the information for the contact.

3.21 Add Additional Addresses

1. Click CONTACTS-->QuickFind and enter the name (or first part thereof) of the contact record with which you want to work. Click the contact's name to get to the overview screen for that contact. (If your find returned only one record, you will be automatically taken to the overview screen for that record.)
2. Click the blue "Add New Address" button in the "Other Location(s)" section.
3. Enter the street address in the "Delivery address" field. There is no need to enter city and state information. Click outside the field to have ebase check for duplicates. Note whether any existing addresses pop up in the Possible Duplicates area. If you find you are entering a duplicate, simply click "Cancel" to back out of the Add Contact process. Alternatively, you may click on the duplicate address to add it to your new record or you may click the "OK" button to ignore the duplicate.
5. You may now add the rest of the information for the contact. If you want to make this address the new primary address, make sure the "Make Primary Address?" box at the top left has an x in it. To distinguish between this address and other addresses, use the "Location" field. If you do not choose a location, the default is "New".
6. When you are done, click "OK" to return to the contact's Overview screen.

NOTE: Each location entry contains both email and postal addresses. If you want to add an additional email address you will still need to create a full location entry.

3.3 Add Item: Introduction

1. First, make sure you are viewing the contact record you want to add the item to in the Overview screen.
2. Go to CONTACTS-->Add Item.
3. ebase tells you what the current item is and gives you four choices:
 - * add items to the current found set ("Found Set")
 - * add items to the current record ("This Record")
 - * choose a new item to add ("New Item")
 - * cancel and return to Overview screen ("Cancel")

Is the current item the one you want to add to the current record? (Most likely, it is not.) If not, select "New Item" and choose the item you want to use on

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the next screen. Once you have chosen, click OK.

If the current item is the one you want to add to the current record, click "This Record."

4. You will be taken to a screen where you can edit the item details by choosing a Priority, assigning it to a department, entering a date to contact by and entering a date that the person was contacted. You may also enter notes for the item. Click "OK" once you are done.

5. You will now see the item in the "Recent Items" field in the contact Overview screen.

3.6 Removing and Deleting Locations, Addresses, Links and Items

EXAMPLE ONE: Remove an address from a location.

1. First, make sure you are viewing the contact record you want to work with on the Overview screen. (CONTACT-->Overview)

2. Click on the location that contains the address you want to remove.

3. On the Edit Address Info screen, click the red "Remove Location" button. Note that this removes only the postal address, not the entire location entry.

4. You will be returned back to the contact Overview screen. Note that the address information has been removed from the location.

EXAMPLE TWO: Mark a location for deletion.

1. First, make sure you are viewing the contact record you want to work with on the Overview screen. (CONTACTS-->Overview)

2. Click on the location you want to mark for deletion.

3. On the Edit Item screen, click the "Delete" icon at the lower right. This does not actually delete the location, but will mark it for deletion, pending review by the administrator. You cannot remove a deletion mark from a location.

4. You will be returned back to the contact Overview screen. You will see that the location you marked for deletion is marked in red. (An exception to this is if the location is set as the primary address. In that case, the address will not be marked in red on the overview screen.)

EXAMPLE THREE: Mark an item for deletion.

1. First, make sure you are viewing the contact record

you want to work with on the Overview screen. (CONTACTS-->Overview)

2. Click on the item you want to mark for deletion. You may view a full list of items on the History screen (CONTACTS-->History, on the left navigation bar).

3. On the Edit Item screen, click the "Delete" icon at the lower right. This does not actually delete the item, but will mark it for deletion, pending review by the administrator. You cannot remove a deletion mark from an item.

4. ebase will ask you to specify a reason why you are deleting the item (added by mistake, at contact's request, etc..) Choose a reason and click "OK."

EXAMPLE FOUR: Mark a link for deletion.

1. First, make sure you are viewing the contact record you want to work with on the Overview screen. (CONTACTS-->Overview)

2. Click on the relationship of the link you want to mark for deletion. You may view a full list of links by clicking on the "Links" link on the left navigation bar under "CONTACTS."

3. On the Edit Link screen, click the "Delete" icon at the lower right. This does not actually delete the link, but will mark it for deletion, pending review by the administrator. You cannot remove a deletion mark from a link.

4. ebase will ask you to specify a reason why you are deleting the link (added by mistake, at contact's request, etc..) Choose a reason and click "OK."

3.61 Mark a Contact for Deletion

1. First, make sure you are viewing the contact record you want to work with on the Overview screen. (CONTACTS-->Overview)

2. Click the "Delete" icon at the bottom right of the screen.

3. You will be taken to a confirmation screen. Click "Delete" to mark the contact for deletion.

4. You will be asked to select a reason for marking the contact for deletion. Choose one and click "OK."

5. You will be returned back to the contact Overview screen. You will see that the entire contact is marked in red.

6. To remove the deletion mark, click on the "Delete" icon again. You will be taken to the Delete Record

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screen for this contact. Click the link at the bottom, "Remove Delete Flag" to remove the flag. You will be asked to confirm your choice.

7. Once you confirm your choice, you will be returned to the Overview screen. Note that the contact is no longer marked in red.

4.22 Add Payment and Link to Solicitation

EXAMPLE ONE: Find the contact and add a payment to the contact.

1. First, make sure you are viewing the contact record you want to add the payment to in the Overview screen.
2. Go to CONTACTS-->Add Item. (Payments are a special type of item.)
3. ebase tells you what the current item is and asks you if you want to choose a new item or apply it to the found set or the current record.

Is the current item the payment you want to add to the current record? (Most likely, it is not.) If not, select "New Item" to choose a new item. Once on the next screen, select "Payments" on the left to see a list of the payment items. Click an item to choose it.

If the current item is the one you want to add to the current record, click "This Record."

4. You will be taken to the Edit Payment screen. The title of the payment, Item Description and Date Posted are already filled in. Fill out the rest of the form and click "OK" when done.

5. You will note that the payment is now reflected in the item history for the contact.

EXAMPLE TWO: Pick the type of payment from a payment list and add to a contact.

1. On the left navigation bar, click on PAYMENTS-->Add a Payment
2. You will be taken to a screen where you choose the type of payment you want to add. Select the appropriate link.
3. You will be taken to the Attach a Contact screen. Enter the contact's complete first and last name in the "Enter Name" field and click outside the box to have ebase look for matching records. Click on the name you want to add the payment to.

NOTE: This search tool is not as extensive as the Find tools on the Contact screens. If you do not have the

contact's full name, or cannot find an existing contact for any other reason, click cancel and use the procedure in EXAMPLE ONE above.

4. You will be taken to the Edit Payment screen. The title of the payment, Item Description and Date Posted are already filled in. Fill out the rest of the form and click "OK" when done.

5. You will note that the payment is now reflected in the item history for the contact.

4.24 Print Thank You Letters / Payment Receipts

EXAMPLE ONE: Create thank you letters/receipts for a single contact

NOTE: This can be done when you are adding the payment item to a contact. This example assumes the payment is already added.

1. First, make sure you are viewing the contact you want to work with in the contact Overview screen. In the "Recent Item(s)" field, click on the payment for which you want to thank the contact. (If you cannot see the item in this field, click on CONTACTS-->History to view all items for a contact.
2. Click on the "Send Receipt" link on the Edit Payment Details page.
3. If the merged document does not open immediately, choose option two "Open the WordDocs directory" and open "ThankYou1.doc"
4. In Microsoft word, go to Tools-->Mail Merge and choose option three. This will create a file of all your form letters with one letter on each page.
5. To view your labels, open the document "LabelsA5160.doc" in the WordDocs file.

EXAMPLE TWO: Create thank you letters/receipts for a found set.

1. Use CONTACT-->Find or CONTACT-->QuickFind to retrieve the found set of contacts you would like to send the letter to.
2. Go to IMPORT/EXPORT-->Export to Word. Select option one: "Open the WordDocs directory." This opens the WordDocs file in ebase that contains the form letter templates. Open "ThankYou1.doc" and edit it as appropriate. You may add or delete merge fields at this point. Save the file when you are done.
3. Choose option two, "Export Contact data for use in Word," to start the export process. ebase asks you to confirm. Select "OK."

4. You will see a dialog box where you can select the fields you wish to export. Generally, the default fields are all you need and you can select "Export."

5. ebase will ask you to choose an item name to apply to the records you are exporting. Use the item name for the letter you want to send to the contacts. ebase adds the item name you select to each contact's history. (For help with adding items, see "Add Items: Introduction.")

6. Once you have chosen the correct item, apply it to the found set by clicking "Found Set."

7. ebase will ask you if you want to create new transactions for found set using current transaction code. Rephrased, ebase wants to know if you want to add the current item to the found set. Click "Yes."

8. If the merged document does not open immediately, choose option two "Open the WordDocs directory" and open "ThankYou1.doc"

9. In Microsoft word, go to Tools-->Mail Merge and choose option three. This will create a file of all your form letters with one letter on each page.

10. To view your labels, open the document "LabelsA5160.doc" in the WordDocs file.

6.11 QuickFind

1. On the left navigation bar, Click CONTACTS -->Quickfind.

2. Enter the contact's last name (or the beginning portion of the name) in the pop-up window and click "OK" or click "Find All" to view all contacts. If you want to find an exact name, enter it in quotes.

3. If more than one contact name matches your search criteria, ebase displays a list of names that meet the criteria. Click the contact's name on the List screen to go to the Overview screen for that contact.

6.12 Find All Contacts

1. Click CONTACTS-->Find

2. You will be asked where you want to search. Click "Find All".

3. A dialog box will inform you once the find is complete. Click "OK" to see the list of records.

4. To verify that all records have been found check the top of the List screen. The first line tells you what record number you are viewing out of the total number of records in the search. The second line tells you the total number of records in the database. Make sure total number of records in the search matches the total

number of records in the database.

6.3 Sorting a Found Set

1. Go to CONTACTS-->List on the left navigation bar to view a list of the current found set. Or click the "List" icon at the bottom of the screen.

2. Decide which column you want to sort by.

3. To sort alphabetically, click "(A-Z)" to the right of the column title (at the top.)

3. To sort reverse alphabetically, click "(Z-A)" to the right of the column title.

7.2 Email to Individual

1. On a CONTACTS Overview screen, click on a contact's email address. You can click on any of the email addresses listed: the primary contact or any under Other Location(s).

NOTE: In two cases, a red rectangle replaces the mail icon:

* If there is no email address for a contact's primary address.

* If ebase has detected an error in the form of the primary email address. You will be warned before an email can be sent.

2. ebase will log an item to record the mail you've sent. Choose an item that best suits the message you're sending. If you want to keep track of the responses to this email for a Response Analysis report, choose the appropriate solicitation item.

3. Compose your message. Type directly into the "Subject" and "Body" fields. Click "Send."

4. The full text of your message is preserved as part of the log item you specified, which now appears in the Recent Items portal on the Individual Overview screen. Click the item to review the message that was sent.

7.3 Email to List: Send to a List of Subscribers

NOTE: Before trying to send group email the first time, the database administrator should make sure that:

* The SMTP and POP3 hosts are correctly set up in ebase (see Help Topic "User Settings")

* The SMTPit and POPit plug-ins have been correctly installed. (see Help Topic "Installing ebase")

1. Click on EMAIL-->Send to List-->"Item List."

2. In the pop-up list of code titles, choose the item code that identifies members of the list you wish to

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send to. Click "Find." ebase will display a list of contacts for you to approve. If the list is correct, click "OK." If not, cancel and add/delete item codes from contact records as needed before continuing.

3a. Create a new unique item code to identify your email message and aid in tracking responses to it.

- * A Code Title is required and must be unique.
- * A code description is required and should be unique.

The Code Structure must be unique. Class must be "Communication" and the next three code buckets should contain data. Type/Version should be "Email," and at least Date information should also be recorded to distinguish your code from past and future email tracking codes. For more information on creating codes, see Help Topic "Creating Codes."

Click "OK."

3b. Choose an existing email template's code from the list that appears when you select "Existing."

NOTE: codes that appear in this list of existing templates are those designated as "Recurring Email Messages." To view a code's settings, go to ADMIN-->Add/Edit Codes and select the code's Class in the menu at the top of the list.

4a. If you chose to use a new code, compose your email message as text by typing into "Email Subject" and "Email Body."

NOTE: You can chose from three merge fields to use in the subject line and ten merge fields to use in composing the body of your message. For more information on the use of merge fields in email messages, see Help Topic "Email to List: Personalizing"

4b. If you chose to use an existing template, go to step 6.

5. (Optional) To send HTML email, first click "View HTML Format." The subject line will be the same as in 4. Paste your HTML code into the "Email Body Text" field. You should always create a text version (step 4 above) of your message as not all recipients will have email software capable of handling HTML.

CAUTION: if you DO NOT wish to send HTML email, don't enter any data in the HTML "Email Body Text" field. If you put anything in the HTML "Email Body Text" field, it will be displayed instead of the text version for all recipients with HTML-enabled email clients.

6. Click "OK" to see the list of messages ready to be sent to each list member.

Preview an individual message by clicking its recipient's name. The preview window shows you a message's subject and text body as they will appear for the recipient, and also shows HTML code if present.

The message footer at the bottom of the preview window cannot be edited here. It is created from your user settings specified in ADMIN-->View Users. The message footer will also contain information instructing recipients how to automatically unsubscribe from your mailing list.

If your messages look ready to send, press "OK, Send the mail."

7. ebase will send your messages and then present "Statistics for sending email to the list." To view individual message results, click "Review Sent Mail" and then select individual messages as in previewing (step 6, above). "Done" returns you to the CONTACTS Individual Overview screen.

8. ebase will not store the customized version of every message sent, but it will log your chosen tracking code for every recipient. The message template, including any merge fields, will be attached to this log item for future reference.
