DATABASE PROJECT

Documented File Maker Tasks

10/2011

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Problems of database listed throughout in RED

General File Maker Tasks – Various Staff Members

Tasks:

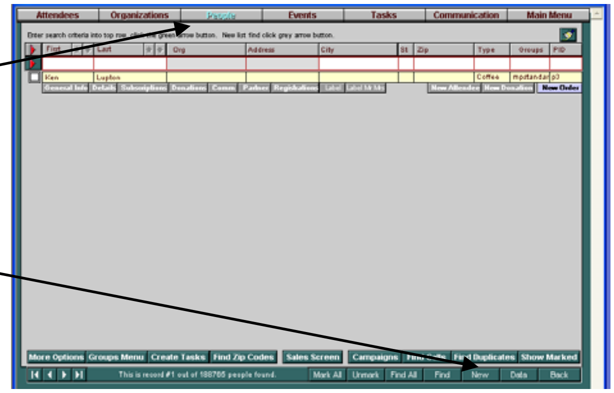
Entering individuals

Create a Group

Entering Organization records or editing Organization records

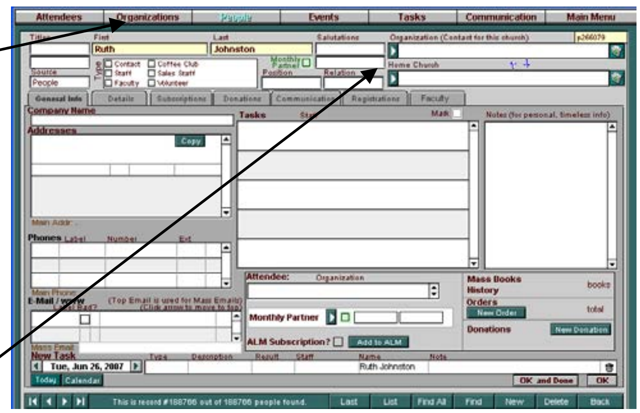
Sending Mass Emails by Zip Code
Includes both the Zip Code Search and Sending the Email

Task: Entering individuals



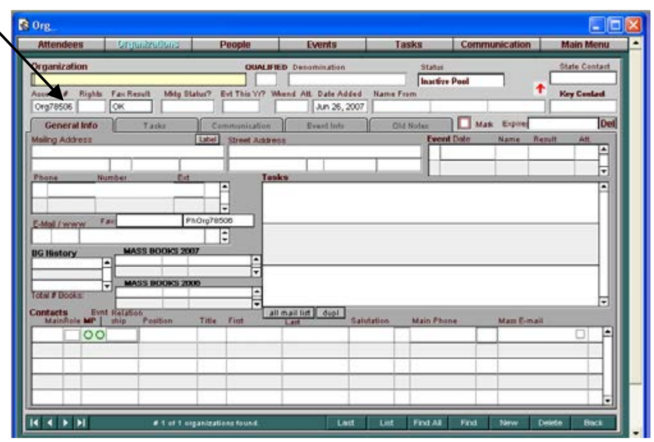
How is it done?
In the people screen, search to see if the individual is already in Filemaker.
If so, update any information that is not current.

If not, click "New" (green tab). Type in name, then continue.



Fill in as much information in the screen as possible.
If they are affiliated with a church, check if it is already in Filemaker, click on Organizations.

Click New, then fill in as much information as is known. Check the internet for additional information about the church, including the pastor.



Go back to People screen.
Click on Organization, and click on new organization just entered.

What is used that is not in Filemaker?

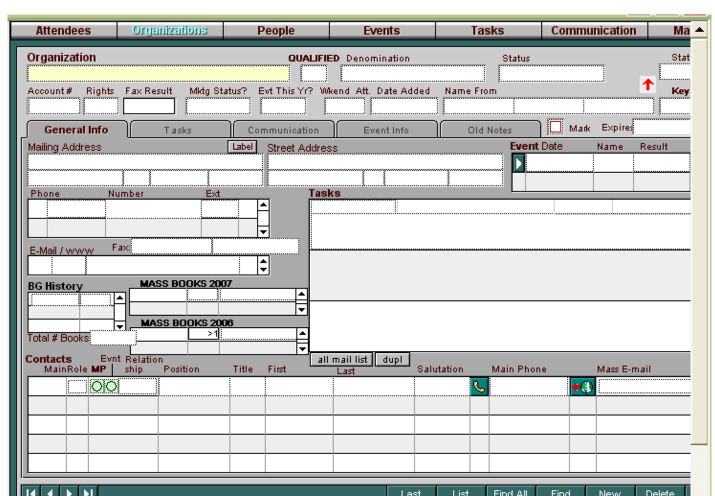
How much time does it take?

How is this used outside of Filemaker?

Problems / Suggestions:

- It would be EXTREMELY helpful if, when entering customer's data, it would automatically put it in correct format, i.e.: capitalization, etc. That would keep entries consistent.

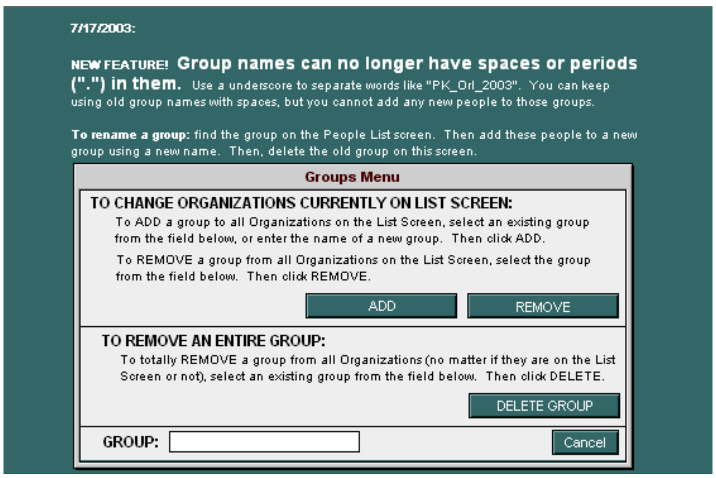
Other opportunities for use



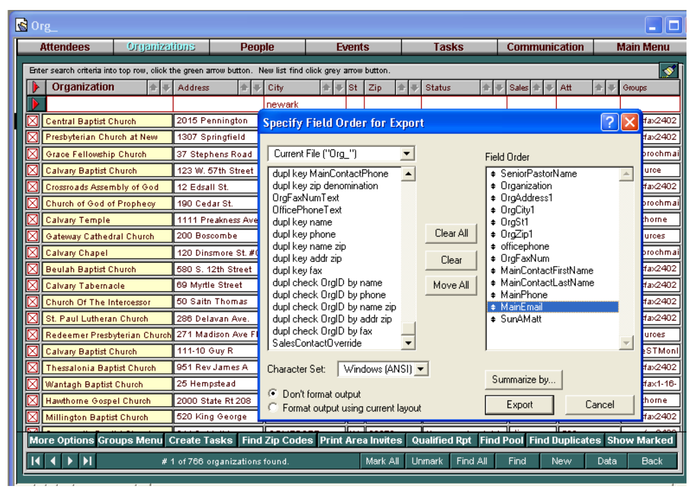
Task: Create a Group

How is it done?
In Organizations or in People, search on any field to find whatever group is required.

Go to Groups menu and create a name.



Export the group into Excel, including necessary information (church, name, address, phone, email, contact, senior pastor)



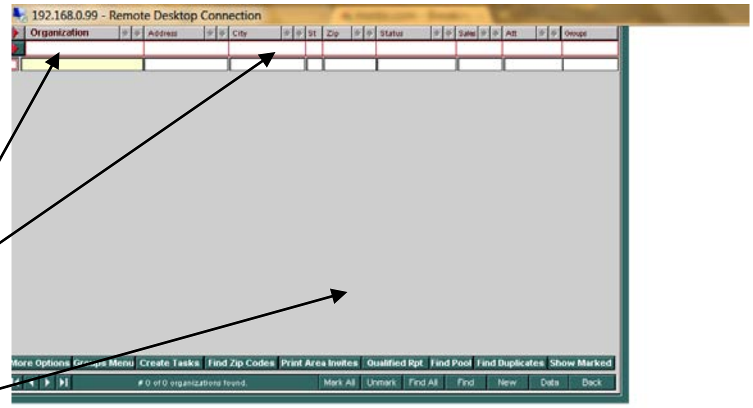
What is used that is not in FileMaker?
Excel spreadsheet.

Time Required: depends

How is this used outside of FileMaker?
Anytime we need to get data into another program or solution.
Problems / suggestions: A lot of manual input is required if changes need to be brought back into the system.

Other opportunities for use:

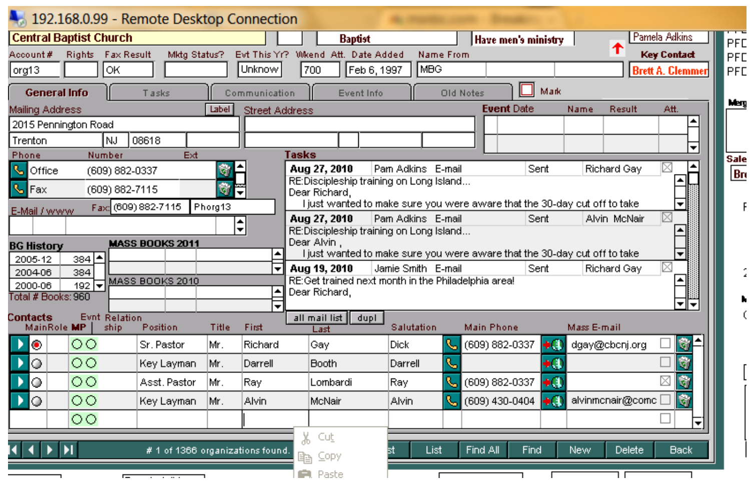
Task: Entering Organization records or editing Organization records



Go to Organization

Enter first few letters of organization's name AND city and/or state.

If Org doesn't show up in the list go to the New tab and
enter Org's info on this page

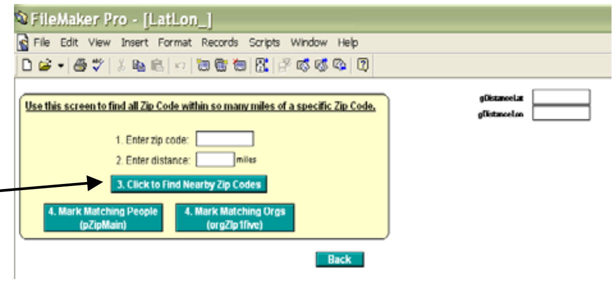


If Org's info needs editing, do soon this page

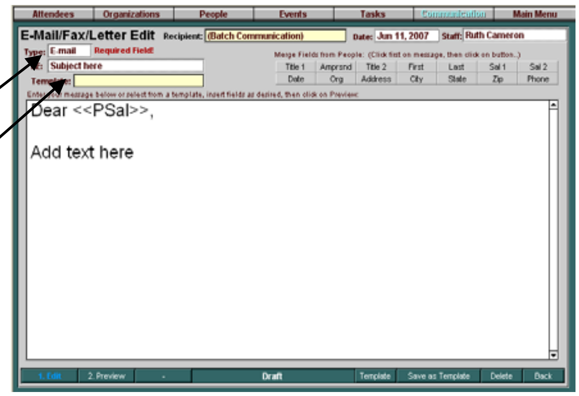
Make sure that the main contact for the Org has a red dot by his/her name

Task: Sending Mass Emails by Zip Code
Includes both the Zip Code Search and Sending the Email

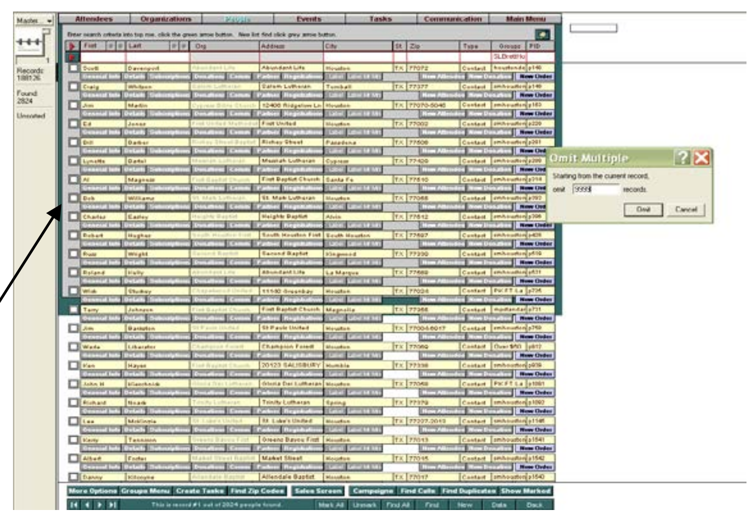
How is it done? From People screen, in find mode
Steps:
To create the list:
Open a name in people
Click 'list' (a green tab)
Find Zip Codes – follow instructions
When finished, click 'back' then 'show marked'.



To save it:
Click Groups Menu (at the bottom)
Give it a name (no spaces, include your initials)
Hit add.



To send an email:
Open a name
Click 'list'
Click 'More Options'.
Send communication
 Fill in type
 Re: give it a subject
 Template (bottom of page)
  Find old one
  Make changes
  Save it with a new name
Preview
Send (sends to Outlook Express outbox)
Hit send/receive in Outlook
– then they send.
To sort out those who don't have email addresses:



If the list is a large one, break it up into groups of 1,000.

While still in FileMaker and in the List option….
 Click unlockit
 At the top left of the page, click the starting number (hit enter)
 Then go to Records
  Omit Multiple
  Type in numbers

For example, a list that is 2,824 names long –
 Go to record 1001 (enter)

Then, click Records
    Omit Multiple
    Type in 9999
    Hit enter
What remains is the first 1,000 names of the list.
Send the email to that list.

Then, to send the next batch…..
Go back to the original list.
Go to record #1
    Go to Records
    Omit multiple
    Type in 1000, and what remains is 1,824 names (the first 1,000 are missing – they have already been sent)
Go to record #1001 enter
Go to Records again
    Omit multiple – type in 9999
    Hit enter – what remains is the middle 1,000 records of the list
Send the email to that group.
Repeat that step as often as needed if the list is longer.

Go back to the original list one last time.
Go to record #1
    Go to Records
    Omit Multiple – type in 2,000, enter
    What remains is the final 824 names of the list (the first 2,000 have been omitted and the emails already sent).

What is used that is not in FileMaker? nothing

Time Required: Each search requires some time and the actual sending requires even more.

How is this used outside of FileMaker? It's not

Problems / suggestions: It takes a long time as it scans each outgoing email

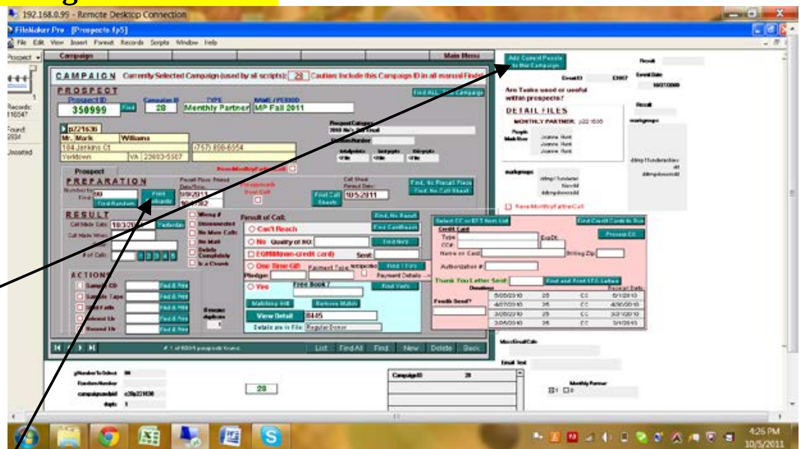
Other opportunities for use:

CEO/PRESIDENT/PC/ MAJOR DONOR – David/Ruth

- **Create Campaign List for Calling and Postcards**
- **Create President's Circle (Major Donor) Monthly Mailing List (or any other mailing list)**
- **An area search for PC / CAC / BOD members in a geographical area, created to send an advance notice to these people about 3 weeks in advance of a seminar in their area.**
- **Search for donation report by dollar amount**
- **Search for Man in the Mirror Bible Study (MIMBS) first time attendee OR Man in the Mirror Bible Study (MIMBS) team or leaders**
- **Search for a record associated with a particular email address**
- **Card Club / Sending birthday cards**
- **Register someone's attendance at the Annual Summits / 25th anniversary / special events.**
- **ALM TASKS - THE ALM IS NO LONGER AND THIS SECTION IS EXTINCT & NO LONGER NEEDED**

Problems/Suggestions in RED

TASK : Create Campaign List for Calling and Postcards



File – Open Remote – Prospects
Campaign (28 so far)
Each Campaign is a special event or season of direct phone calling to find ministry partners
In People – you create a group
Add people to group
On this page Add All Current People to This Campagn Button
Asks: "Do you want to add…?"
OK /Yes
After adding people give NAME to Type (Ex. Father's Day Book Orders, EQMIM subs, etc.)
Need to Print Postcard for the Group
Will ask if you want to print a postcard to the group. Answer: OK

Prints a 4-up Personalized Postcard Layout – front and back with addresses for 4 recipients on front and Dear (First Name) and text on back. **Printed on legal size paper which we then cut into four postcards. Our copier/printer cannot print a single postcard because it would be too small.** One Example:

Front:
John Smith
123 Main St.
Orlando, Fl 32789

Back:
Dear John,
Thank you so much for….
Blessings,
David Delk

See attached (See Attachment #1)
PROBLEMS/SUGGESTIONS: This is a complicated merge. We do not use Word because Word wants to print records 1, 2, 3, 4 on the front and records 5, 6, 7, 8 on the back and we need records 1, 2, 3, 4 on front and records 4, 3, 2,1on the back.

I solved this by creating another table in filemaker that has four people on a single record, and enough records for each person in the list. Then the front and back of our layout has the information for four people but only one record behind the scenes.
Would also like to send emails to these prospect set

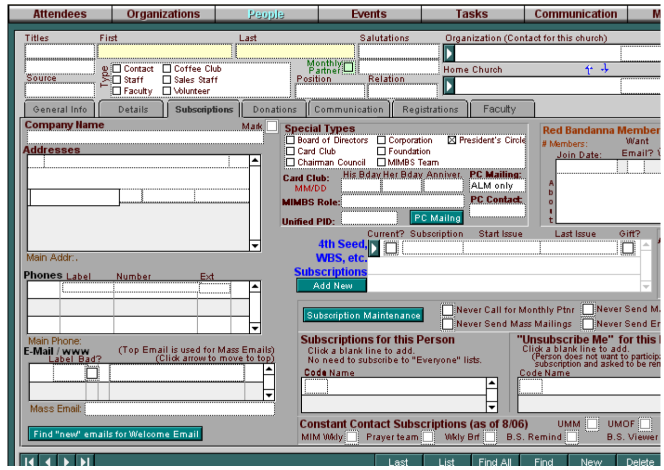
It automatically Records the Precall Piece Printed date

Print Paper Call Sheet for Calling Campaign
Answer: OK

Calling Sheet has many fields with Question Scripts for the kind of call it turns out to be
See Example (See Attachment #2)
Results from Call are added to the various fields so that we know the response

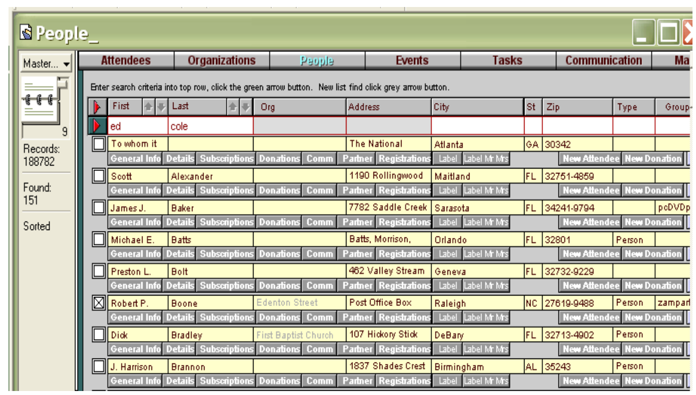
Task: Create President's Circle (Major Donor) Monthly Mailing List (or any other mailing list)

How is it done?
In the People screen, a name is opened.
Using the Subscription tab, go into find mode.
PC Mailing is chosen.
The list is sorted by type of mailing – **was ALM or CD – NEEDS to be CD OR NO CD.**

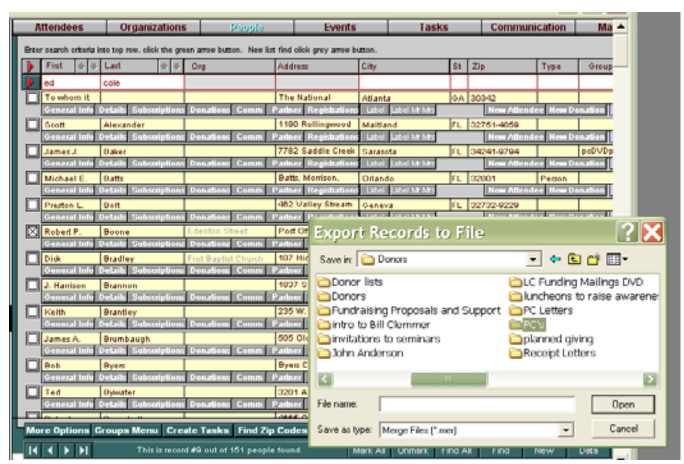


Put it in List form, then sort in ABC order.

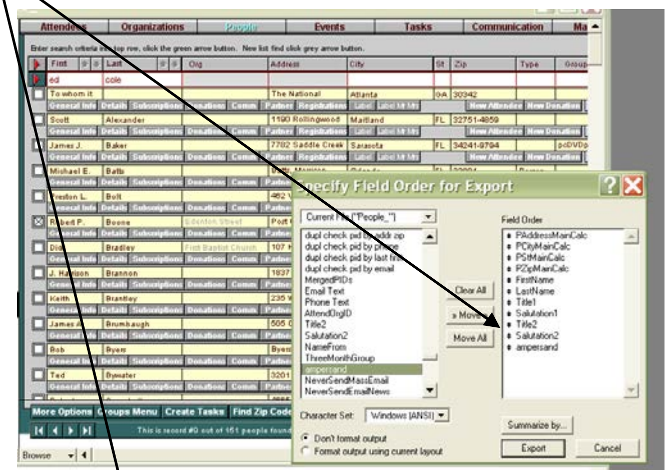
Labels are printed in Filemaker.



To save for a mail merge, click Cancel, then click File, Export Records, choose Donors, PC's, then give it a current name and save it as a Merge File.



Choose the fields for export, then save it as a Merge File.

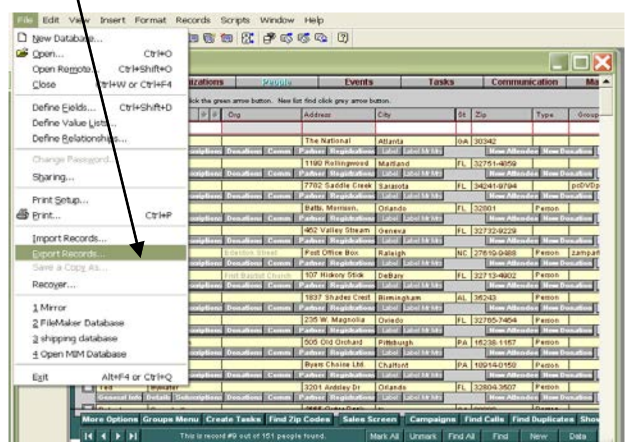


What is used that is not in FileMaker? Once the list is created, it is exported to Excel and then merged using Word for the letter.

Time Required: 20 minutes to create list, plus printing time and mailing time.

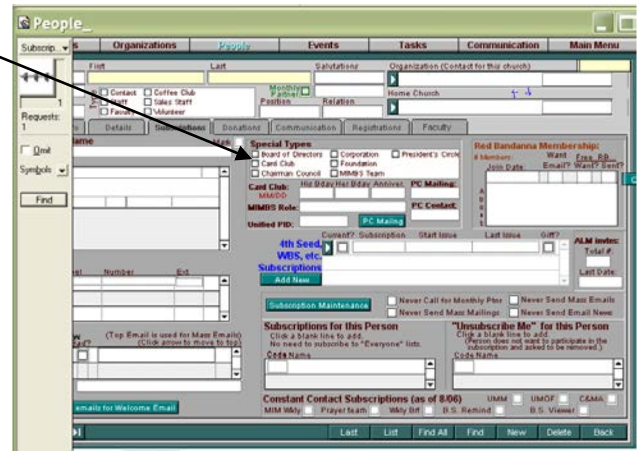
How is this used outside of FileMaker? Reports can be generated as needed using recorded information on PC donors.

Problems / suggestions: Names often missing from list - X from PC box or ALM box goes blank Used to be ALM or CD – NEEDS to have a check box for CD OR NO CD.



Other opportunities for use: Create tasks to track activities, i.e.: email sent, letter sent

Task: An area search for PC / CAC / BOD members in a geographical area, created to send an advance notice to these people about 3 weeks in advance of a seminar in their area.



How is it done? Do an area search by zip code (see notes).
Then Mark All
Then, in that list, do a Filemaker search to find PCs
Repeat to find CACs
Repeat to find BODs
Export the list if you desire. (Same steps as Creating President's Circle Mailing List)
Send an email invitation in filemaker.

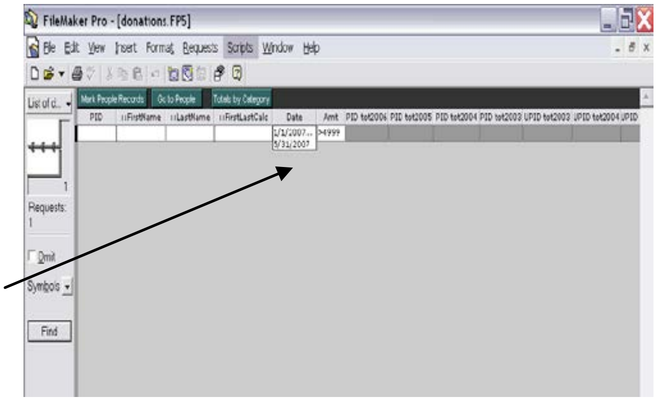
What is used that is not in FileMaker? Nothing
Time Required: About 20 minutes a week

How is this used outside of FileMaker? The email is sent by Filemaker through Outlook Express.

Problems / suggestions: After the initial zip code search, each step has to be done manually. There are too many steps. It would be helpful if it were possible (by way of checked boxes, or some marking) to search for all 3 (PC, CAC, BOD) at once.

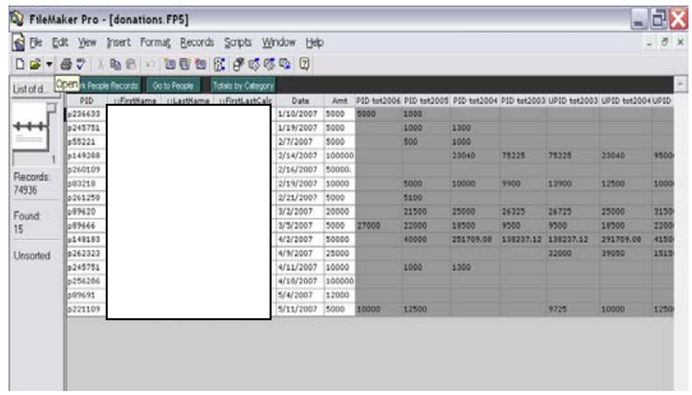
Other opportunities for use: Others on staff use this same technique to create other lists.

Task: Search for donation report by dollar amount



How is it done? Open up a person's record, click donations tab (gray)
Click donation details button (green)
Control + F for find mode
Type in search parameters, hit Enter

Print results report if needed



What is used that is not in FileMaker? Nothing

Time Required: 10 minutes each time it is done

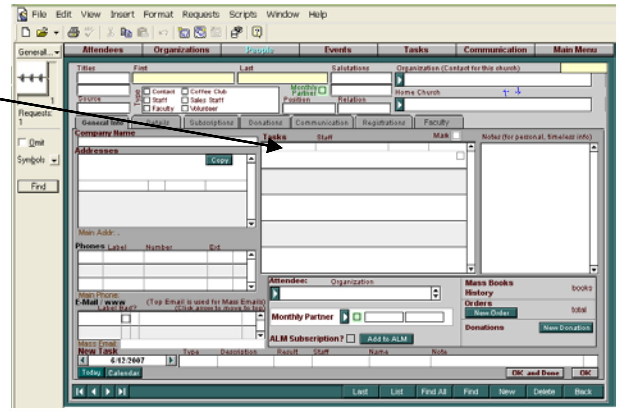
How is this used outside of FileMaker?

Problems / Suggestions:

Other opportunities for use: Others on staff use this same search for various reports.

Task: Search for Man in the Mirror Bible Study (MIMBS) first time attendee

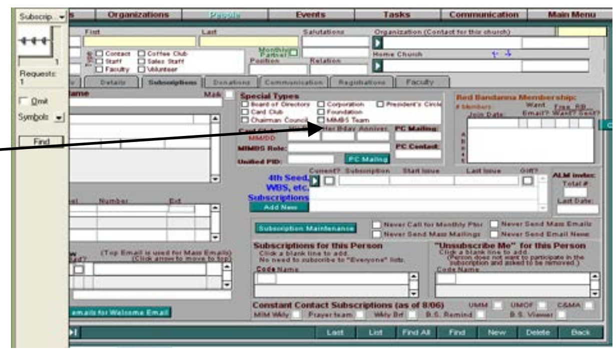
How is it done? Open up a person's record
Control + F for find mode
Type in MIMBS in Tasks, hit Enter
Print report if needed



-OR-

Task: Search for Man in the Mirror Bible Study (MIMBS) team or leaders

How is it done? Open up a person's record
Control + F for find mode
Check MIMBS team under Special Types, hit Enter
Print report if needed

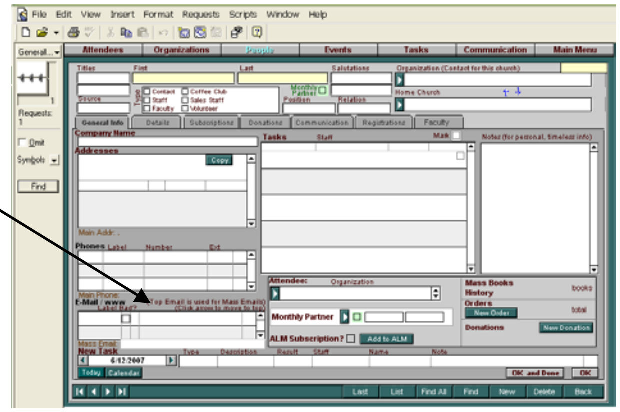


What is used that is not in FileMaker? Nothing
Time Required: 10 minutes each time it is done
How is this used outside of FileMaker? Report is exported to Excel for use.

Problems / Suggestions: It would be easier if there were a box to check for 1st timers, then do the search from that box. Having a better way to keep track of attendance would be helpful.

Other opportunities for use:

Task: Search for a record associated with a particular email address



How is it done? Open up a person's record
Control + F for find mode
Type in a portion of the email address (either before the @ or after the @)Enter

What is used that is not in FileMaker? Nothing

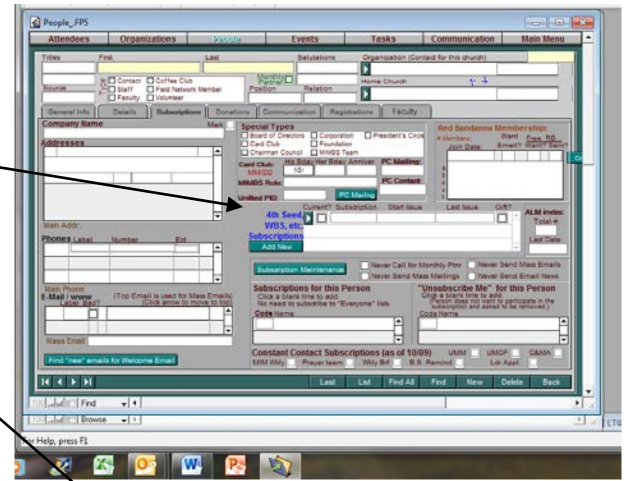
Time Required: 3 minutes each time it is done

How is this used outside of FileMaker? It's not.

Problems / Suggestions:

Other opportunities for use:

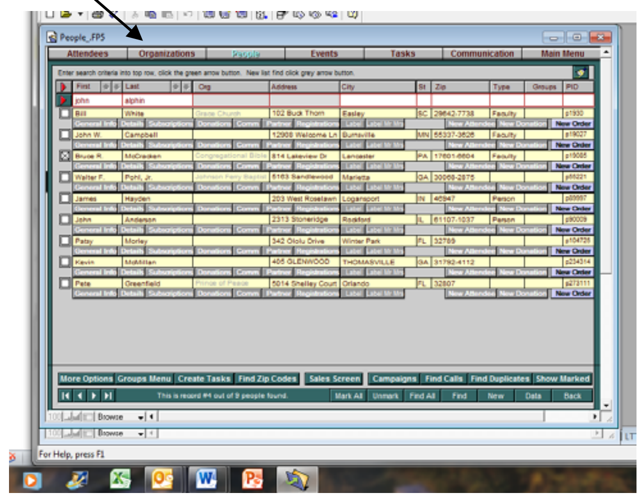
Task: Card Club / Sending birthday cards



How is it done?
Search for a list by birthday, (ie: October)
That will produce a list of names whose birthdays are in that month.
Using the More Options tab at the bottom, labels are printed for the envelopes.
Then, using the File tab at the top of the screen, names and addresses are exported into an Excel or CSV file to create a spreadsheet.

What is used that is not in Filemaker? Nothing

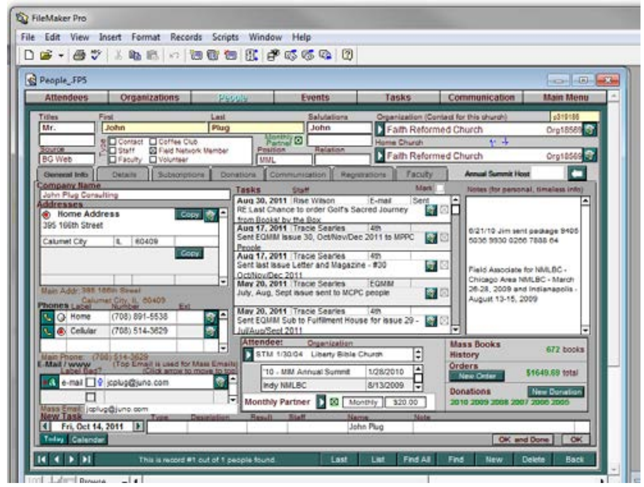
Time Required: 15 minutes



How is this used outside of Filemaker? The list is exported
to Excel or CSV.

Problems/Suggestions: None

Task: Register someone's attendance at the Annual Summits / 25th anniversary / special events.



How is it done?
An event is created in much the same way that Jamie creates events for LTC (SEE PAGE _____) and the person is recorded as an attendee.

What is used that is not in Filemaker?
Attendance list (perhaps this is imported)

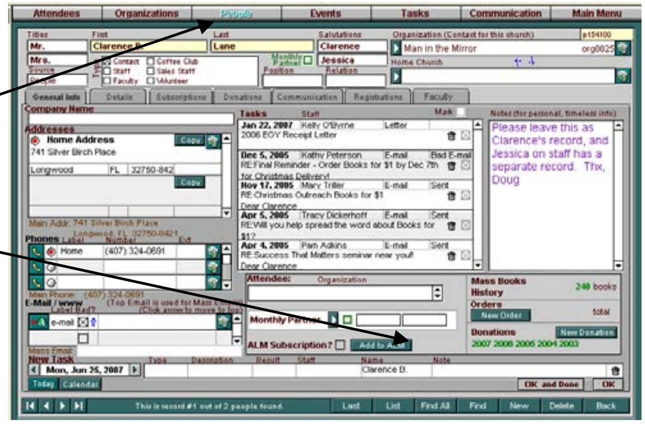
Time Required:

How is this used outside of Filemaker?

Problems/Suggestions: It would help if there was a different way to do this for special events. If three was a checkbox or some other easier way to just check this off. It would require front page space, and the ability to add year after year. Perhaps "attendance" is the best way, but just wondering….

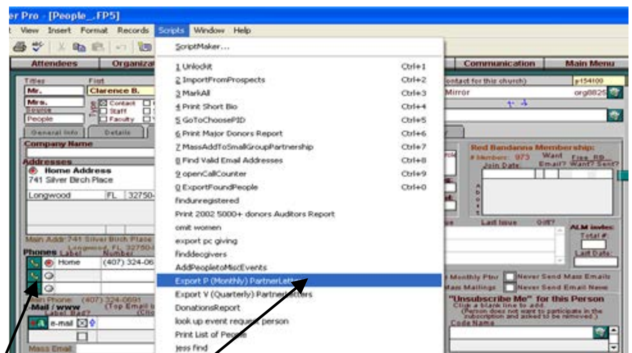
ALM – THE ALM IS NO LONGER AND THIS SECTION IS EXTINCT & NO LONGER NEEDED

Task: Adding a new ALM subscription



How is it done?
In people screen, do a find to open the person's name that needs to be added.
In the General Info tab, click on the Add to ALM green tab.
The person is then automatically added as a subscriber.

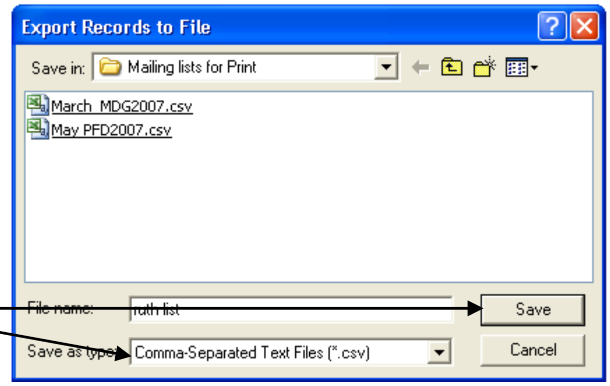
What is used that is not in Filemaker? A request to be added as a subscriber that has come in the mail, by phone, by email or by a reply card.
Time Required: Minutes, as needed



How is this used outside of Filemaker? It's not.
Problems/Suggestions: None.

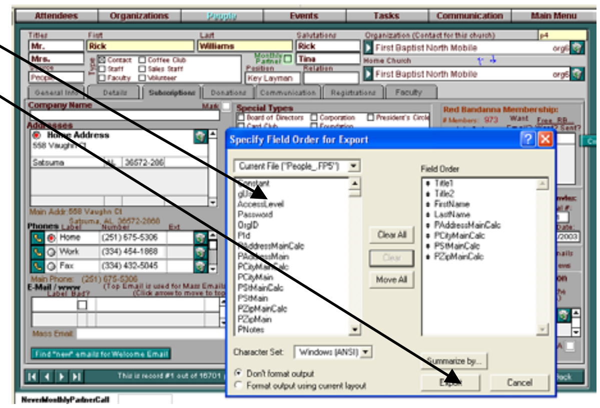
Task: Exporting the ALM list for mailing

How is it done?
In people screen, open up a person, click on Subscriptions tab.
Open Scripts, choose Export P (Monthly) Partner Letters
It will find the list needed for export.

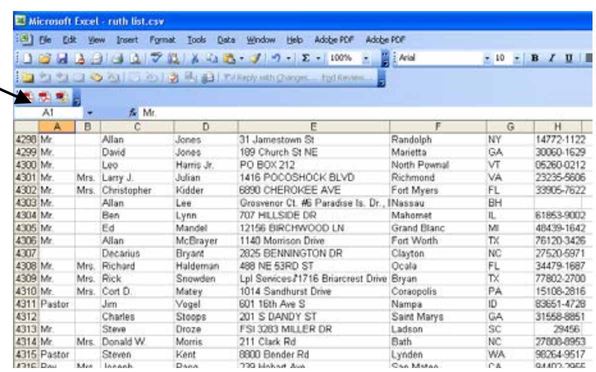


Save it as a CSV file.

At the next screen, specify the fields needed for export.



The list will be saved automatically as an Excel file in
Shared Files/ALMs/2007 ALMs/Mailing lists for print/(the name of the specific file).
The list is then emailed to the mailing house for fulfillment.



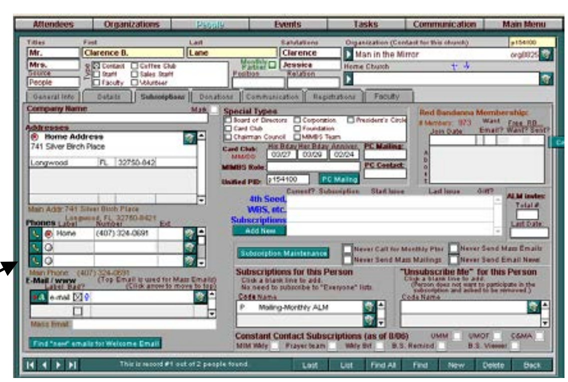
What is used that is not in Filemaker? Nothing.

Time Required: 15-20 minutes, quarterly

How is this used outside of Filemaker? The Excel file is sent to the fulfillment house for mailing.

Problems/Suggestions: None. It's very efficient. Keep this task and rename it Changing Addresses for any person on the mailing list.

Task: Changing addresses for ALM subscribers (or any other person on our mailing list)



How is it done?
In people screen, do a find to open the person's name

that needs to be changed.
Verify the address.
Change it if a new address is available.
Unmark it for mailing if no new information is available.

What is used that is not in Filemaker? Returned mail or a specific request to make a change.

Time Required: Minutes, as needed

How is this used outside of Filemaker? It’s not.

Problems/Suggestions: None.

SEMINARS/LTC – Jamie/Jim/Tracie

SEMINARS – Jamie/Jim/Tracie

Tasks

- **Setting up an Seminar upon scheduling**
- **Printing letters or reports from the tab menu**
- **Seminar Bookstore Process**
- **Adding attendees to a Seminar**
- **Seminar Report – Sales & Attendance**

Problems/Suggestions in RED

LTC (Leadership Training Center) - Jamie

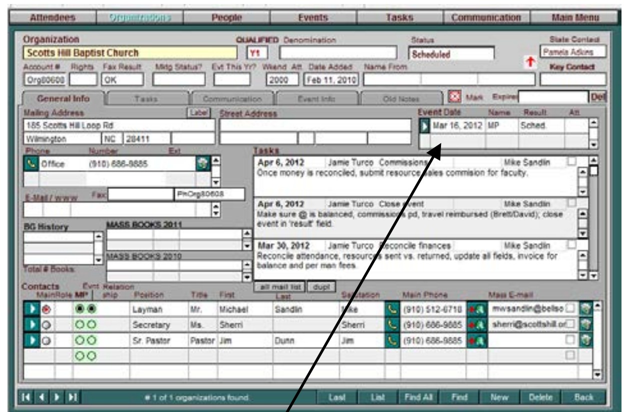
Tasks

- **Entering individuals who attend (LTC) leadership training events**
- **Register individuals for an LTC Training**
- **Enter an LTC Training**
- **Enter an LTC order.**

Problems/Suggestions in RED

Note: The seminars process has been streamlined and now, *many* functions, reports, and tabs are no longer needed. **Anything not mentioned in the tasks below is no longer used.**

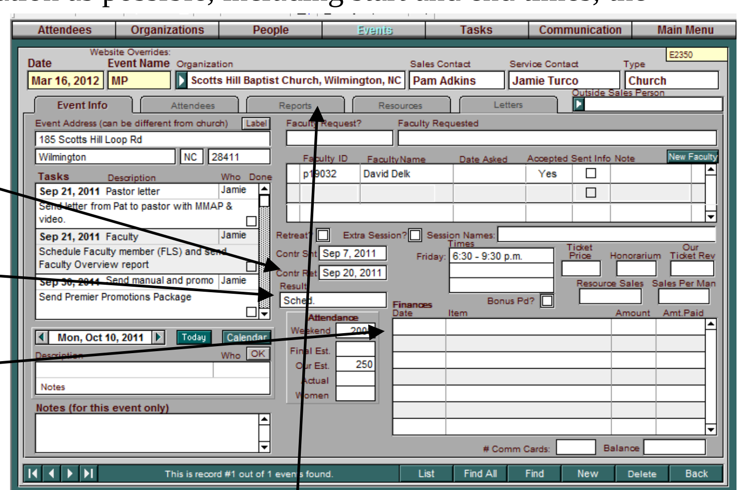
Task: Setting up a Seminar upon scheduling



How is it done?
When we receive the completed Scheduling Agreement, go into the Organization database and pull up the correct org. Make sure all information matches that on the contract, in terms of address, phone, etc. Be sure to “red dot” the person at the organization that is going to serve as Event Coordinator. Otherwise, the event tasks will not be assigned to him/her.

Then, go to where it says Event Date and type a date in the blank field (formatted as 3/16/2012). This will signal the creation of a new event. Click on the green button beside the date to pop into the new Event page.

On the Event page, fill out as much information as possible, including start and end times, the event type, the faculty member who will be speaking, their estimated attendance, etc. Put any unusual info about the event in the Notes field. IMPORTANT: You must put a date in the field “Contr Ret” and put the event as “Scheduled” in the Results field. Once this is done, event tasks will be automatically generated.



There is also a place, marked “Finances” to keep track of invoice expenses and payments, which is critical, because a **report** can be generated from this information at any point in the event process, by clicking the “Reports” and choosing “Print Invoice.” (See Attachment #1.) Use these to invoice the host organization for extra materials, overprinting, resources income, etc.

What is used that is not in Filemaker? The scheduling agreement that a church returns is the source of event information. Also, for event support, I have started to have my own task lists that I generate in Excel because it’s easier to have all event tasks together in a binder for me. I also don’t know how to add tasks or change tasks in FM (David does it for me) so although I mark the tasks off as I complete them in FM, my true working task list is in Excel. This also allows me to write in notes for a task, if needed.

How much time does it take? 5-10 minutes

How is this used outside of Filemaker? It generates all event tasks to be done and signals that it’s time for event support to begin. Until this is done, I don’t do anything for the event. It also is the foundation for generating numerous reports for event support, such as a Faculty Overview, a bookstore, etc.

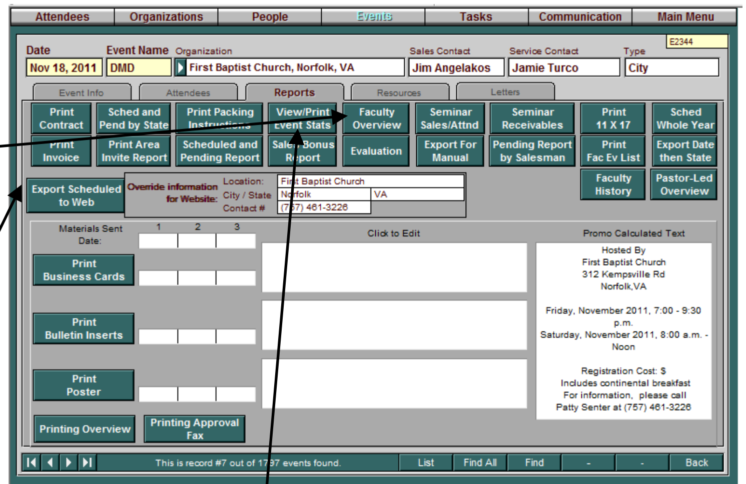
Problems / Suggestions:

- It'd be nice if we could change the person at the organization that tasks are assigned to as needed. Sometimes the key contact for the event changes, but we can't make changes once the event has been marked as "Scheduled."
- Most of the reports and letters that are kept under the tabs on this screen are no longer used. For example, the Manual has been changed to a Word document that has zero merges from FileMaker, and many of the letters have been replaced by support emails and phone calls from a Ministry Consultant.
- It'd be nice to be able to edit or add info to a task, as needed.
- Some of the tasks are separate for You Teach It events and Faculty-Led events. It'd be nice to have two different task lists, depending on event type.

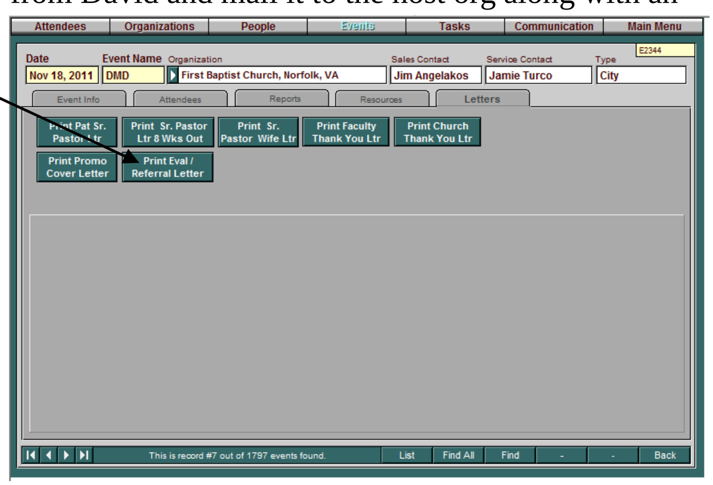
Other opportunities for use: Other departments may use this event info when planning other speaking engagements around these seminars, support staff uses the info to book travel for speakers, and we use these churches on most marketing lists.

Task: Printing letters or reports from the tab menu

How is it done?
The following letters or reports are the only ones I still use in FM, using the tab menus:



- After securing the faculty member, on the Event page, choose the Reports tab, and click “Faculty Overview.” (See Attachment #2.) Print it. I put this in Ruth’s box for David/Brett, and fax/email it to the other faculty as applicable.
- If I need to send the host org an invoice, click “Print Invoice.” (See #1.) This is done at any point in the event process, but one final one is sent post-event. **The nice thing about this one is that I can right click it and copy the page, making it easy to send by email.**
- Once all comment card data is entered after an event, I print a summary report for the host org by clicking “View/Print Event Stats.” (See Attachment #3.) I mail this with the comment cards and a letter/evaluation from David. I also make a copy for the event folder.
- I print the “Scheduled and Pending Report” (See Attachments #4) on occasion, but I have a new report that gets distributed to staff because the other didn’t contain all the necessary details.
- After the event, I print a letter from David and mail it to the host org along with an evaluation form. The letter pulls information automatically, such as the key contact, church address, and event name. (See Attachment #5.)



What is used that is not in Filemaker? I use a simple Evaluation to send with David’s letter after the event from Word.

How much time does it take? These various reports/letters can all be printed in seconds.

How is this used outside of Filemaker? The Faculty Overview is used as a checklist for our speakers, but internally, it’s the signal to Ruth to start a travel folder for David/Brett. The other reports/letters are sent to the host organization.

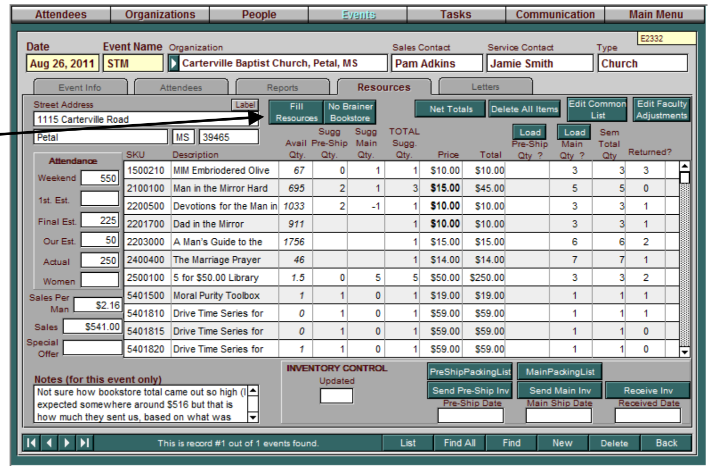
Problems / Suggestions:

- It’d be great to be able to email these forms to people rather than having to print and mail/fax/scan.
- It’d be helpful to have a notes section on the Faculty Overview, or have the fields be modified if needed.
- The current Scheduled/Pending report doesn’t have all needed details.
- There’s no way to generate a nicely-formatted Completed events report.

Other opportunities for use: Support staff uses the info to book travel for speakers and to track and collect event money.

Task: Seminar Bookstore Process

How is it done?



On the Event page, go to the Resources tab. On the left side, make sure an attendance estimate is filled in. Then hit Fill Resources.

The SKUs and products will automatically pop up, along with suggested quantities. First I scan and adjust prices as needed, because event pricing differs on certain products. I delete any titles I don't want to send, and add the ones I do want to send that aren't on the list. Then I put the actual qty I am going to send in the "Main Qty" column.

Once I'm done with this, I click the green button "MainPackingList" and the following items are printed – two lists of what I'm sending (packing lists), a letter to the speaker, a list of items to include in certain packages, etc. (See Attachments #6.)

After the event is over, I get the unsold resources back and fill in the "Returned" qtys.

I then hit the green button "Net Totals" and it shows me how much money should be received. I place that amount on my event invoice (using the finances section on the main event page). I also print this report. (See Attachment #7.) Once reconciled, I put the total amount in the "Sales" field and it calculates the "Sales Per Man" automatically.

What is used that is not in Filemaker? Nothing (except the products, order forms, and pricing tents I send, and some items for our speaker).

How much time does it take? This process takes longer than it should (see problems/suggestions) and when you include packaging and shipping everything, it takes about an hour.

How is this used outside of Filemaker? This prints the inventory list that goes with the bookstore to the host organization. It also prints a letter to the speaker, is used to reconcile event resource sales, and helps Tracie figure out her resource sales.

Problems / Suggestions:

- The retail prices are not the same as event prices on many of the items and have to be changed manually.
- The suggested quantities are never what I choose and therefore not helpful. One column for a quantity would be great, with one return column. I don't need five different qty columns. This process was from when we sent a sample bookstore ahead of the real bookstore and it's no longer needed. I also don't need many of the shipping buttons in the bottom right corner for this same reason. The Main Shipment is now the only shipment.

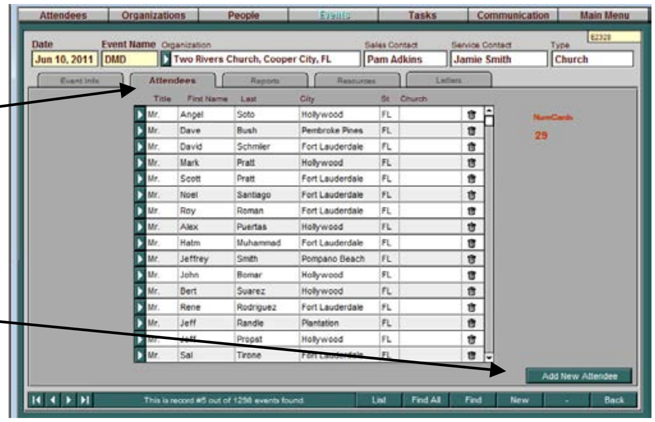
- What would be great is if each event type (STM, 7S, MP, etc.) had a list of products attached to it that would automatically pop up, with no quantities. Then I could just enter that info myself. These template lists would be **easy to modify**, which is not true now, to allow for new titles from MIM, titles going out of print, faculty requests, etc.
- As of now, many titles that come up are no longer sent, and many new titles are not included in the automated list so I have to go find them and add them manually.

Other opportunities for use: None that I can think of, unless you count helping Tracie manage inventory and sales.

Task: Adding attendees to a Seminar

How is it done?

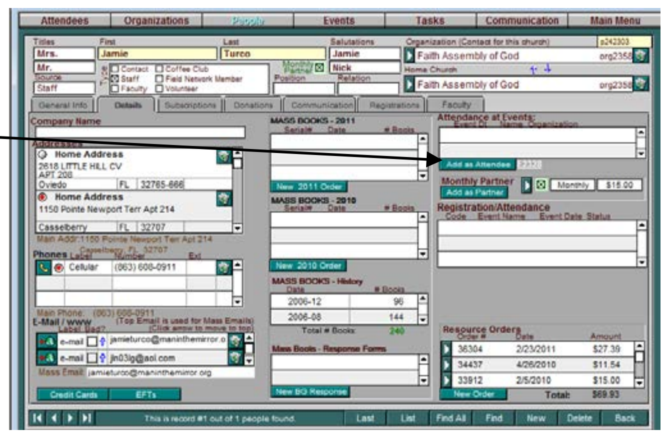
The comment cards provide the attendee data. First, I enter each person into the People database, following the same system on the LTC instructions (as far as simply entering a person and his contact information).



Once everyone is in the database, I go to the Event page and click on the Attendees tab.

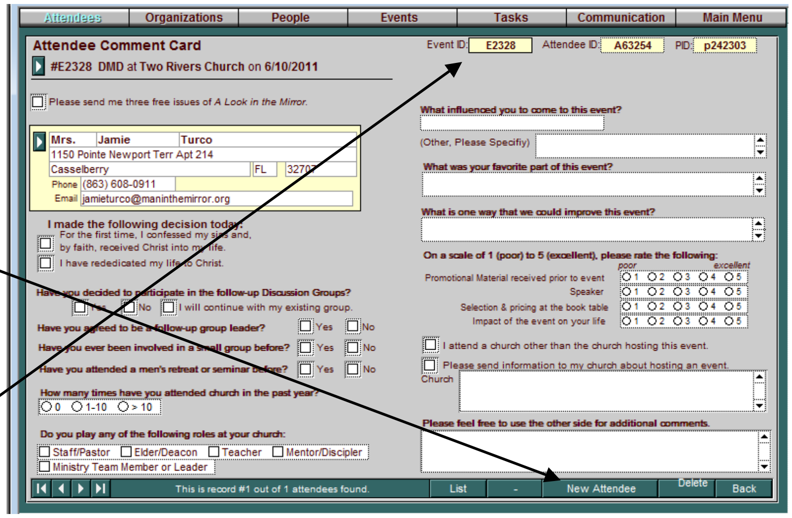
To add someone, you click the green button in the bottom corner – "Add New Attendee."

This opens up a new screen, where you choose the name of the person you want to add to the event.



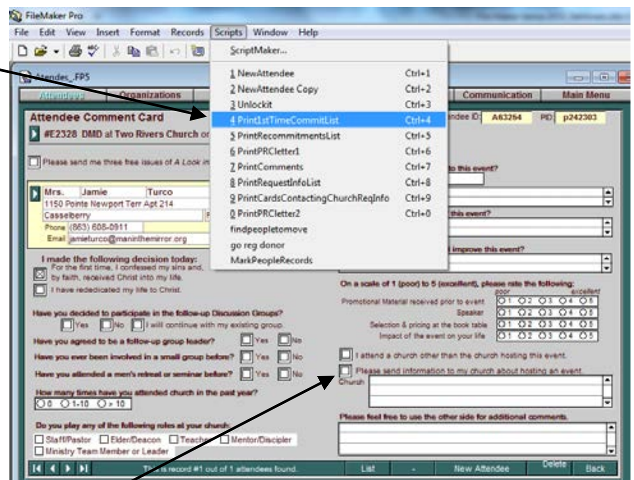
Choose the Details tab in their People record and then click the green button "Add as Attendee." This will automatically assign them to the event and open a new database for you to enter their comment card responses.

Fill out all the information you can, using the person's comment card.



To add the next person to the event, click "New Attendee" at the bottom and repeat that process.

Once you've entered all the attendees, go into an attendee's record and copy the Event ID. Then hit Ctrl F. Paste the Event ID back in that field and then put an X in the first-time-decision box. Hit Enter. This will pull up everyone who made a first-time commitment to Christ. Go up to Scripts on the FileMaker menu and select: "Print1stTimeCommitList." (See Attachment #8.)



Then repeat that find process for the "rededicated" people, choosing the Script "PrintRecommitmentList." (See Attachment #9.)

Repeat the find process, this time placing an asterisk in the comments field titled "What was your favorite part of this event?" Choose the Script "PrintComments." (See Attachment #10.)

For the final find, repeat the process and put an X in the "Please send information…" field." Choose the Script "PrintRequestInfoList." (See Attachment #11.)

Once all this has been printed, print the "View/Print Event Stats" from the Reports tab (See Attachment #3) and send it, with all the find results reports, to the host organization with the original comment cards and letter/evaluation from David. Note: the "RequestInfoList" printout only goes to the Ministry Consultant, not the church, as a leads list for future events.

Then Close the event, using the dropdown menu on the "Results" field on the main event page.

What is used that is not in Filemaker? Completed and returned Comment Cards.

How much time does it take? This process takes a long time – for example, a 50-person event may take 2-3 hours.

How is this used outside of Filemaker? The print-outs are sent to the host organization as an event report; a copy is saved in the event folder. If David/Brett is presenting, he receives a copy, too.

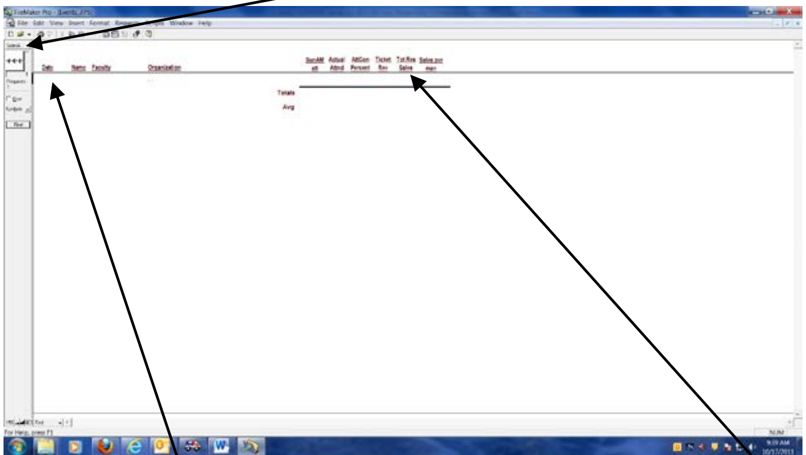
Problems / Suggestions:

- The fields are not easily-navigated (by tabbing, etc.) so it's very time-consuming.
- Much of the information is not ever looked at by MIM staff/faculty so I've stopped entering it, as discussed with my supervisor, due to time constraints. I now only enter the commitments, recommitments, comments, and if they want more info on hosting (the things that are printed and reviewed).
- It'd be nice to have an automated report function for internal use, such as event ratings and suggestions for improvement – IF it was going to be used.

Other opportunities for use: See above suggestion (a tool for improving the events program). Also, the Ministry Consultant gets leads for new events from the feedback.

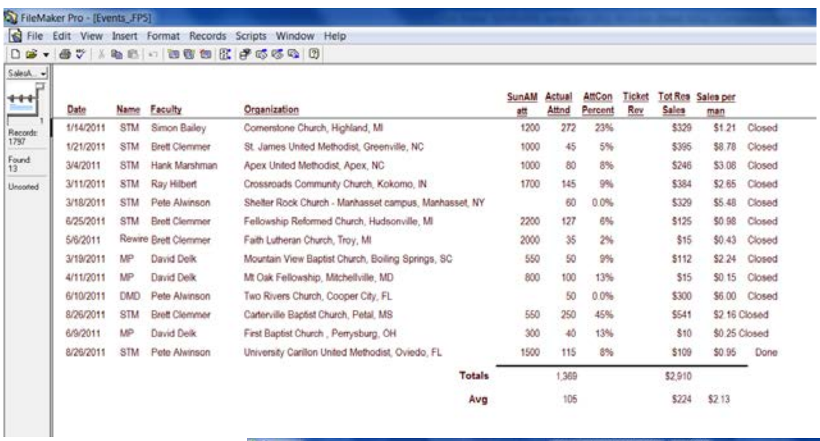
TASK: Seminar Report – Sales & Attendance

SalesAndAttndreport from drop down menu



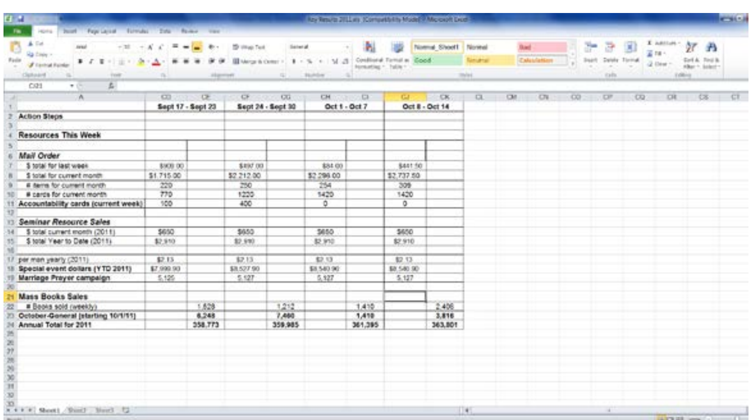
Do a find on Date >=(current year 1/1/2011) and (>.1) under Tot Res Sems
Then hit enter.

This report comes up.

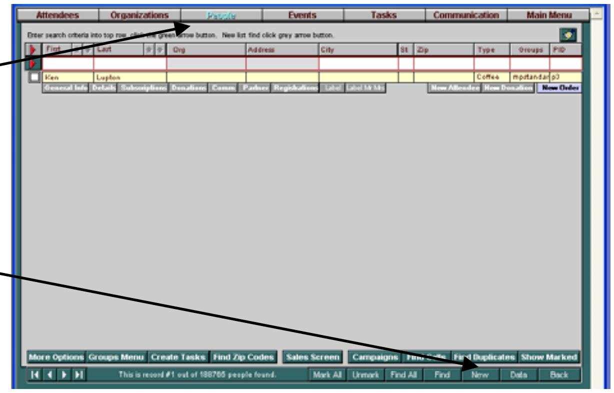


Date	Name	Faculty	Organization	SunAM att	Actual Attnd	AttCon Percent	Ticket Rev	Tot Res Sales	Sales per man	
1/14/2011	STM	Simon Bailey	Cornerstone Church, Highland, MI	1200	272	23%		$329	$1.21	Closed
1/21/2011	STM	Brett Clemmer	St. James United Methodist, Greenville, NC	1000	45	5%		$395	$8.78	Closed
3/4/2011	STM	Hank Marshman	Apex United Methodist, Apex, NC	1000	80	8%		$246	$3.08	Closed
3/11/2011	STM	Ray Hilbert	Crossroads Community Church, Kokomo, IN	1700	145	9%		$384	$2.65	Closed
3/18/2011	STM	Pete Alwinson	Shelter Rock Church - Manhasset campus, Manhasset, NY		60	0.0%		$329	$5.48	Closed
6/25/2011	STM	Brett Clemmer	Fellowship Reformed Church, Hudsonville, MI	2200	127	6%		$125	$0.98	Closed
5/6/2011	Rewire	Brett Clemmer	Faith Lutheran Church, Troy, MI	2000	35	2%		$15	$0.43	Closed
3/19/2011	MP	David Delk	Mountain View Baptist Church, Boiling Springs, SC	550	50	9%		$112	$2.24	Closed
4/11/2011	MP	David Delk	Mt Oak Fellowship, Mitchellville, MD	800	100	13%		$15	$0.15	Closed
6/10/2011	DMD	Pete Alwinson	Two Rivers Church, Cooper City, FL		50	0.0%		$300	$6.00	Closed
8/26/2011	STM	Brett Clemmer	Carterville Baptist Church, Petal, MS	550	250	45%		$541	$2.16	Closed
6/9/2011	MP	David Delk	First Baptist Church , Perrysburg, OH	300	40	13%		$10	$0.25	Closed
8/26/2011	STM	Pete Alwinson	University Carillon United Methodist, Oviedo, FL	1500	115	8%		$109	$0.95	Done
			Totals		1,369			$2,910		
			Avg		105			$224	$2.13	

Write down in reports. For example for this report the total Sales $2910, per man is $2.13.

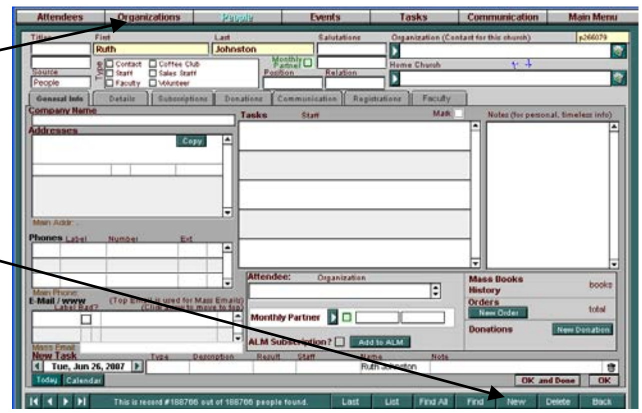


Task: Entering individuals who attend (LTC) leadership training events



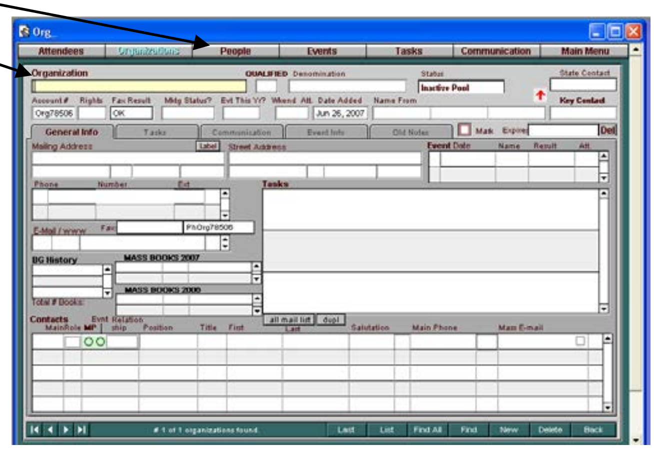
How is it done?
In the people screen, search to see if the individual is already in Filemaker.
If so, update any information that is not current.

If not, click “New” (green tab). Type in name, then continue.



Fill in as much information in the screen as possible.
If the church name is not already in Filemaker, click on Organizations.

Click New, then fill in as much information as is known. Check the internet for additional information about the church, including the pastor.



Go back to People screen.
Click on Organization, and click on new organization just entered.

What is used that is not in Filemaker?
The registration sheet (originally created in Excel) is the source of information, which comes from Registration Cards and Orders online/phone. Information about a church may come from the internet.

How much time does it take? 1-2 hours for a 40-man event. (More, if larger.)

How is this used outside of Filemaker? I use attendee lists for future marketing efforts, etc.

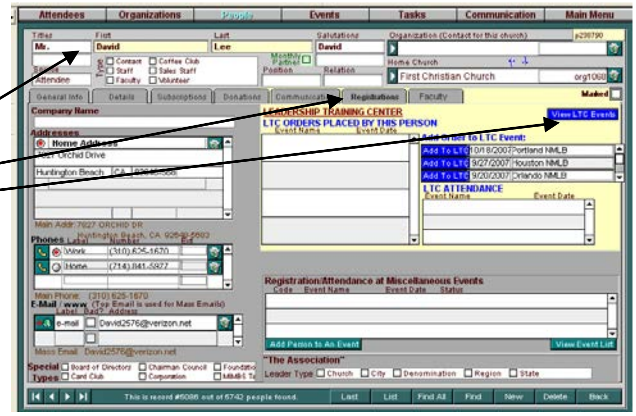
Problems / Suggestions:

- It would be EXTREMELY helpful if, when entering customer’s data, it would automatically put it in correct format, i.e.: capitalization, etc. That would keep entries consistent.

Other opportunities for use: Other departments may use this information once it is in Filemaker, especially for marketing and monthly partner prospects.

Task: Register individuals for an LTC training

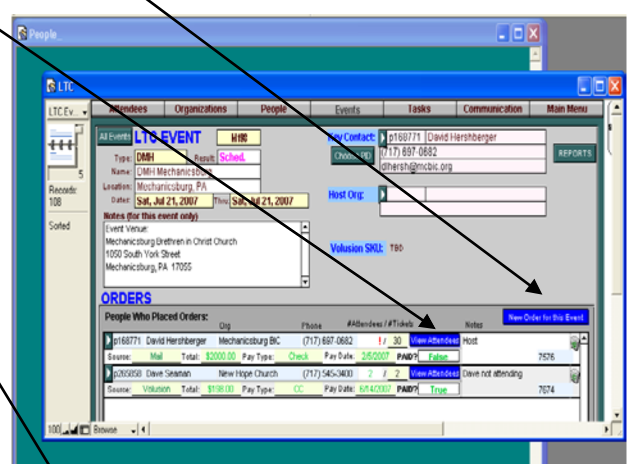
How is it done?
In People screen, open the name of an attendee.
Click on Registrations tab
Click blue tab View LTC Events



The list of LTC events shows up.
Click on an event.

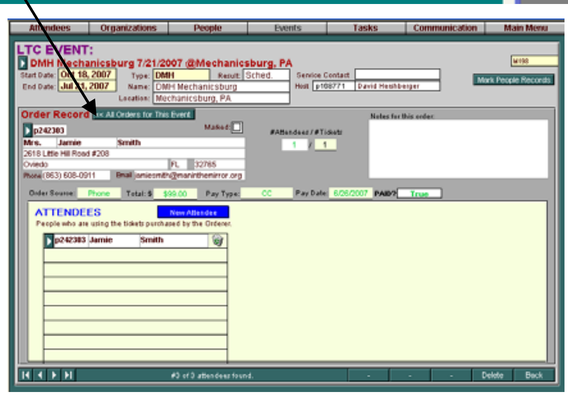
Click on New Order tab.
Click a name; fill in the blanks with his order details.

Click View Attendees.
Register him as an actual attendee, along with any other guests attending under his order.



To return to the order screen, click All Orders for this Event.

Continue registering participants if needed.



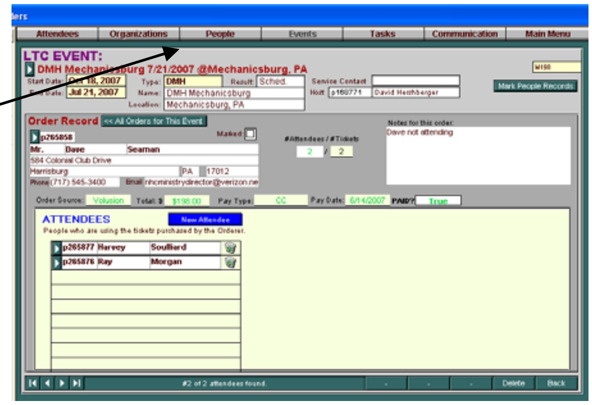
What is used that is not in Filemaker?
The registration sheet (originally created in Excel) is the source of information, which comes from Registration Cards and Orders online/phone.

How much time does it take? 30 minutes for a 40-man event. (More, if larger.)

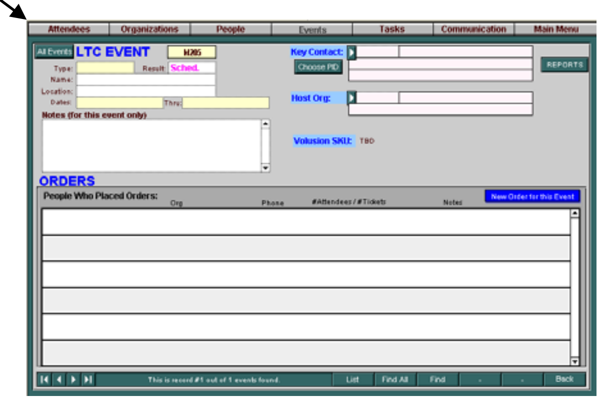
How is this used outside of Filemaker? I use attendee lists for future marketing efforts, etc.

Problems / Suggestions: If you click on an attendee, (i.e.: Ray or Harvey) the purchaser's record shows up (Dave Seaman). There are some other kinks in the navigation. Also, if I say they paid by check, it shows up as False under Payment.

Task: Enter an LTC training



How is it done?
In People Screen, open any name.
Click Registrations tab, the View LTC Events, then New, then a blank form shows up**.**
Enter details for the event.



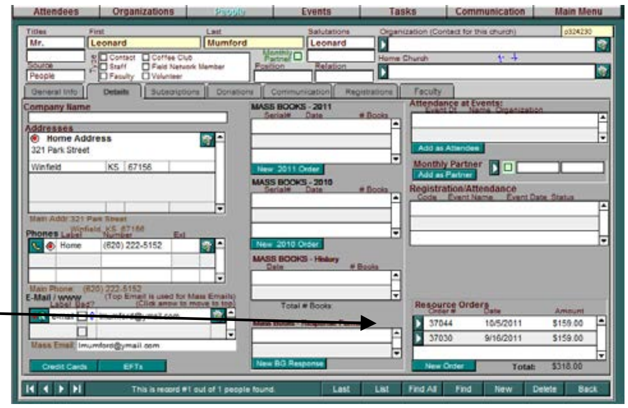
What is used that is not in Filemaker?
Event information

How much time does it take? <5 minutes for an event.

How is this used outside of Filemaker? It's not.

Problems / Suggestions: Host Org field does not work.

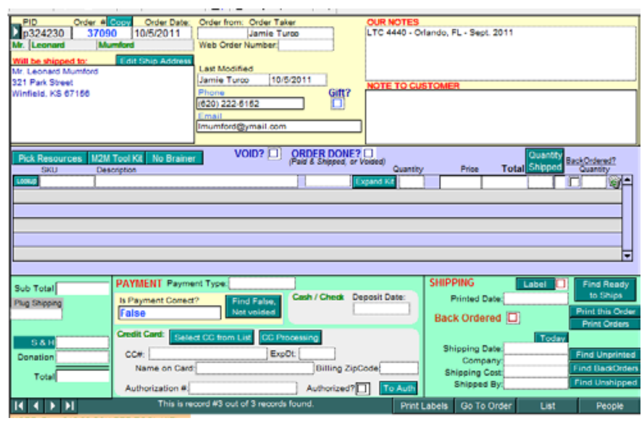
Task: Enter an LTC order.



How is it done?
In People Screen, find the person who is ordering (paying). Complete any missing information, including church.

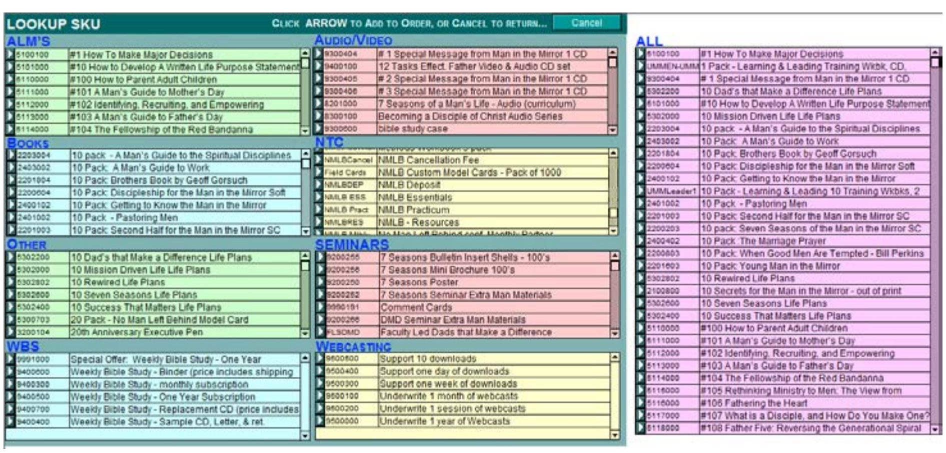
Click the Details tab on the People record. In the bottom right corner, under Resources Orders, click New Order.

In the Our Notes section, I code the income. For example, for tuition for a fall training event in Orlando, I'd put LTC 4440 – Orlando, FL – Sept. 2011.



Then under the SKU section, I click the green button, Lookup.

All of our products will be listed. LTC items can always be found under the category "NTC" (Leadership Training Center used to be called National Training Center). I find the product I want, which in this case is a ticket to the NMLB Essentials event. Click the green button with the white arrow next to this product to select it.



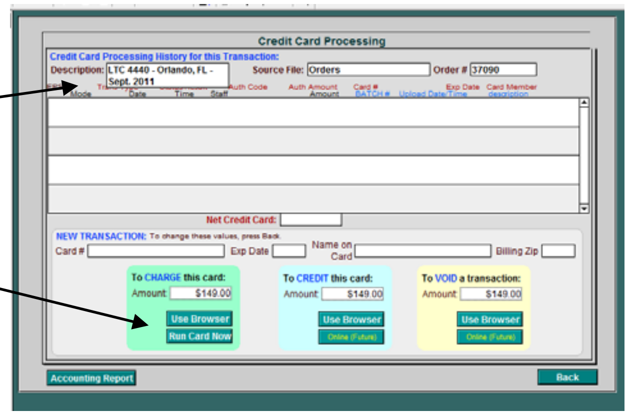
Then I insert the shipping (0 in this case) amount in the Plug Shipping field, and hit the green S&H button to carry it over.

Once the price is correct, I click on Payment Type to select their method of payment from the drop down menu. If they've registered on our website, I choose CCWeb, enter the deposit date, and I'm done. Same process if they've registered with a check. However, if they've registered via a credit card # over the phone, I choose Credit Card and must fill in the other details.

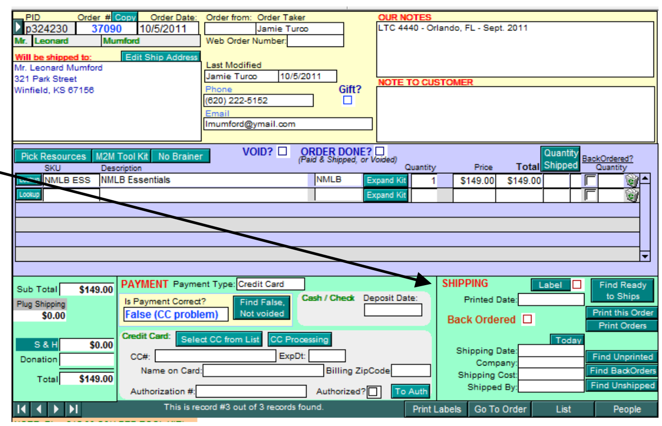
I click on the green button “Select CC from List” and if their card is not already there, I enter and save the credit card information. After I select the card, I return to the order page and click on the green button “CC Processing.”

The Credit Card Processing page opens and the first thing I do is enter the income program and code in the Description field. This is VERY important; otherwise, LTC will not get the income (Resources will).

Then I click on the green button “Run Card Now.” After a pause, a number 1 will show up on the screen, meaning it has gone through successfully. A 3 means the card number is invalid and a 2 means it has declined.



I click the green button “Back” in the bottom right corner to return to the Order page. I am done with an order if it’s for LTC tuition. I don’t print a receipt because I print those from Word and modify them for each person. However, if it’s an order for Courseware, I print the receipt, and fill in the shipping details in the bottom right corner.



How much time does it take? 5 minutes per order.

How is this used outside of Filemaker? For Courseware, I print the receipt and send it with the product.

Problems / Suggestions: I wish the SKUs that we’ve marked Inactive would not show up on the list of products under NTC, as designed. It makes it confusing to find the SKU you really need – especially on Courseware products.

MONTHLY PARTNERS – Scott/Caleb

Maintenance - Scott

Tasks:

Partner Information Maintenance

Donation Processing

Trouble Ticket Follow-up

Mailing Fulfillment – Monthly Partner Mailings

Calling Program – Caleb

Tasks

Printing Call Sheets, checking for duplicates (Prospects Database)

Printing Call Sheets (Prospects Database)

Processing Prospects (Prospects Database and Regular Donor Database)

Processing Underachiever and Previous Givers (Regular Donor Database)

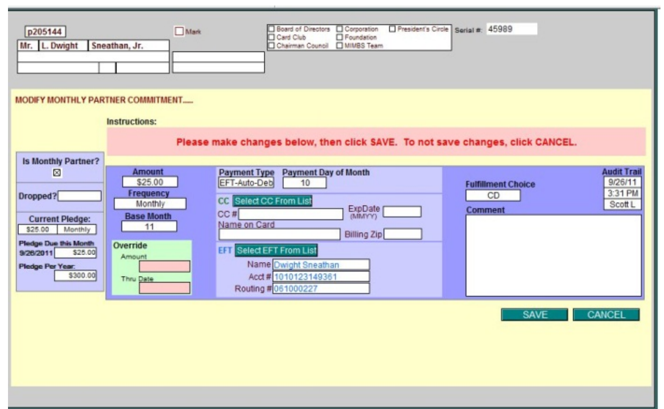
Dropping Partners (Regular Donor Database)

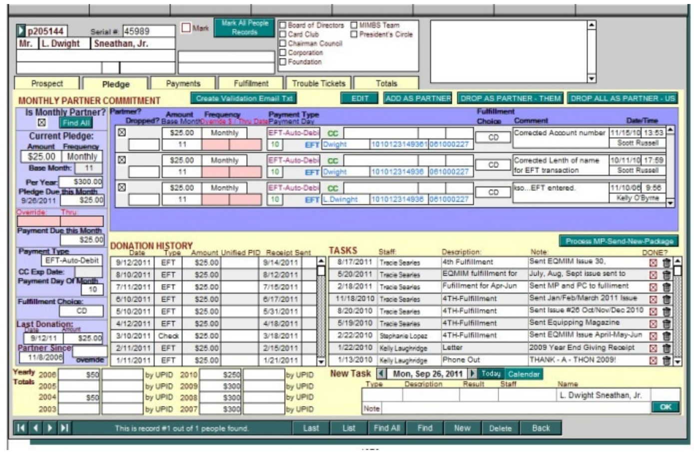
Various databases used: People. Regular Donor, Donations, etc.

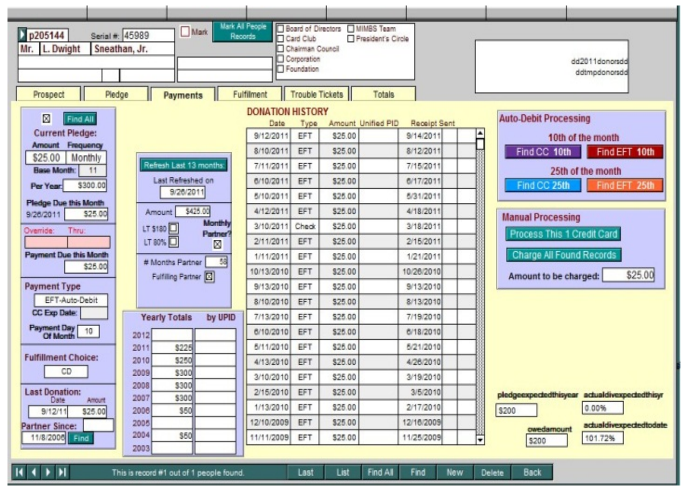
Task: Partner Information Maintenance – daily, as needed

1. Update address info.
    a. Handled through the People/General Info screen on an as needed basis
    b. Required information:
        i. Donor Biographical Info (address, phone number, email address)
            1. Important to have multiple instances of this information (Home, Business, Mailing, etc. and ability to mark preferred one)
        ii. Donor Type Indicator

2. Update Pledge info
    a. Handled through Pledge screen of Regular Donors on an as needed basis
        i. Edit button on screen gives access to another "instance" of pledge information where changes can be made including changes to Pledge Amount, Pledge Type, Frequency, EFT or Credit Card information. When saved, audit trail show the date, time and user that input the changes.



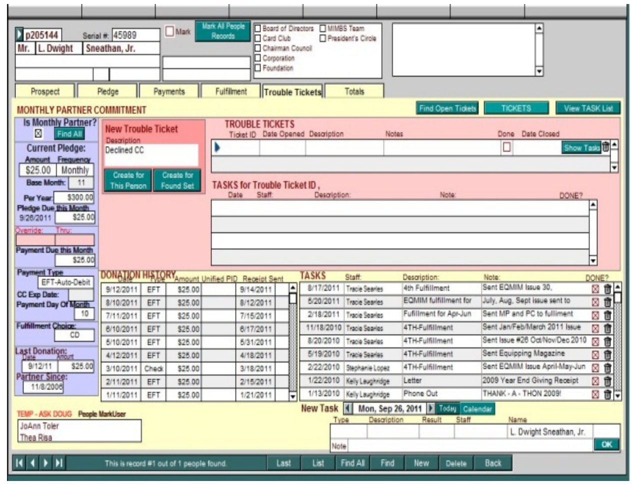




TASK: Donation Processing

1. Check and Cash Donations are entered in the People/Donations screen and happens on a daily or weekly basis. Currently being done by Sharon Carey
2. Auto Debit Processing. For Credit Card and EFT transactions. Other systems involved: Authorize and Credit Union ACH system
    a. Twice monthly on or near the 10th and 25th of each month
    b. "Auto" is misleading as it still requires manual reminder and handling.
        i. Credit Cards
            1. Records are gathered into a batch and processed through Authorized in realtime
            2. Declined records are gathered into a set and marked in the database
            3. Trouble Tickets are then created from declined list. NOTE: This used to create a series of follow-up tasks for each decline however this was discontinued due to personnel shortage and database space. Follow-up is now strictly manual and the trouble ticket closed when resolution is found.
    c. EFT processing requires manual export to banking institution.
        i. "Find EFT transactions" finds all records for the corresponding date.
        ii. Records are manually exported and then "massaged" in Excel into a properly formatted CSV file.
        iii. Process continues by logging on to banks ACH processing, creating a batch and importing the file previously created. File must have at least a one business day lead time.
        iv. Records are then imported into Donations database and a script is run to supply the actual donation date.
        v. In the following days, the bank will email notification of any transactions that did not go through. Those records will then be deleted from the donations database. NOTE: This is a change from previous processing. Formerly, the process was to wait 4-7 days for any declines to occur and then manually enter each remaining record into donations. This resulted in delayed receipts and MUCH manual time.

SUGGESTION: It is desired that this would be handled automatically with no manual processing.



TASK: Trouble Ticket Follow-up Generally handled outside of Filemaker through a Email/Word merge or via phone calls.

1. Export list is created with the following information:

   PID, Lastname, Firstname, City, State, PhoneNumber, Email Address, Last Successful Donation Date, Last Successful Donation Amount, Current CC Exp Date, Current CC last four

2. Process usually alternates between send physical letter, emails or phone calls depending on time and people on hand.

NOTE: If there was an easy, efficient way to handle these "automatically" within a system, it would be most beneficial and cut down on underachievers due to things like expired Credit Cards.

It is desired that follow up would be once again be automated (ie. Follow up tasks created, reports of credit card declines auto-generated and emails auto-sent to those with email addresses..

TASK: Mailing Fulfillment – Monthly Partner Mailings

3 Types of Mailings are done: Monthly, Quarterly, Yearly

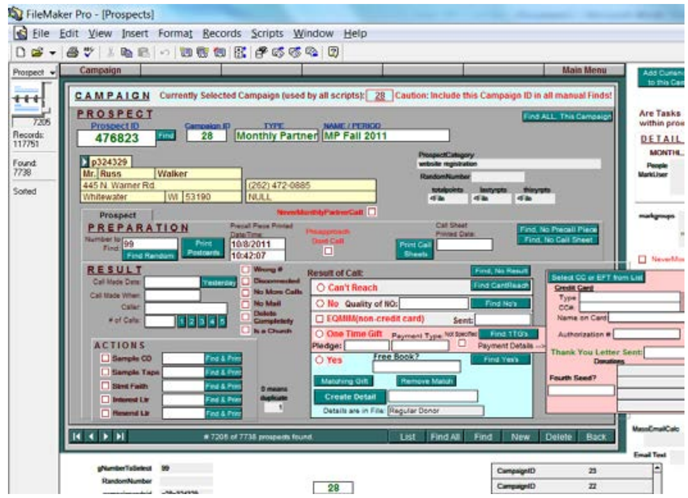
1. Letter is written and entered into FileMaker
2. Manual Search is done to retrieve proper records for the type of mailing, minus any that are President's Circle. Those are given special handling by Ruth
    a. Monthly Mailing. Includes two types:
        i. Those that only want a letter
        ii. Those in Man-A-Month program that receive letter and CD
3. Once list is retrieved, letters are printed (along with labels if needed) and they are sent with any other components to fulfillment company or processed in house as in the case of Quarterly (volunteers)

NOTE: Though a Fulfillment Screen exists in Filemaker, during my training I was told that it did not function properly so I have not used it at all.

MONTHLY PARTNER – CALLING PROGRAM – Caleb

Various databases used: People. Regular Donor, Donations, etc.

Task: <u>Printing Call Sheets, checking for duplicates (Prospects Database)</u>



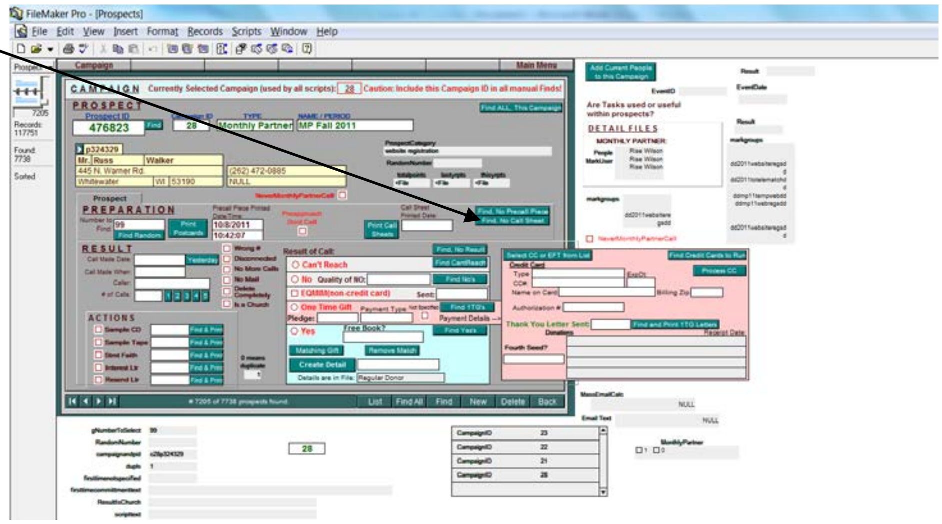
This task is performed a couple weeks prior to the beginning of the phone campaign. It usually takes about 10-15 hrs a week for two weeks to complete.

1. Prospects – Campaign 28. Last Name Search, Preapproach DNC. Check for duplicates that were somehow added in the prospect database. If present, use the merge function in people to combine them into one record.

Task: Printing Call Sheets (Prospects Database)

Printing call sheets takes about 30 minutes. It takes another 30 minutes to separate the call sheets by time zone (eastern, central, and west). This is performed each night.

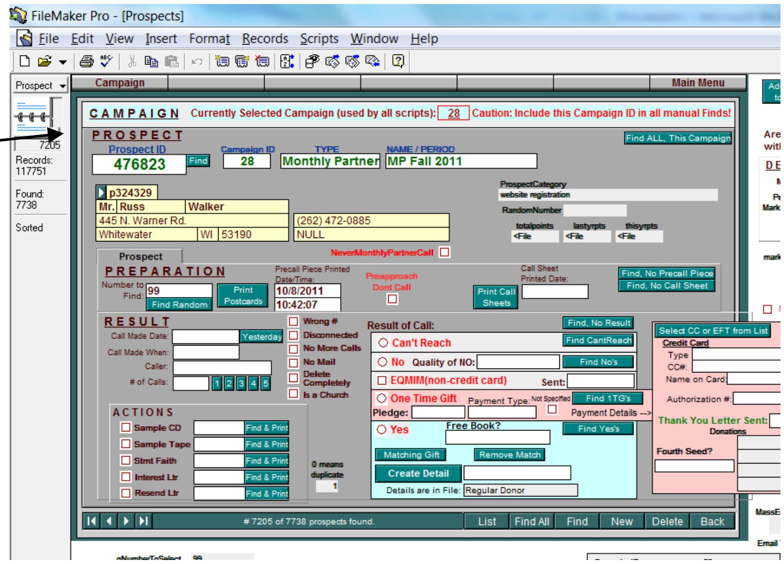
1. Click Find No Call Sheet – Campaign 28, then click ok. Print the number of call sheets desired then click yes on the dates the call sheets were created.



Task: Processing Prospects (Prospects Database and Regular Donor Database)

Processing partners time takes about 3 hrs each night to complete depending on how many there are to process.

1. Find the prospect within the prospects screen by typing in the appropriate prospect id and campaign id.
2. Enter the call results, the date the call was made, clicking yesterday if it was yesterday. Enter when the call was made at night. Enter the appropriate Initials of the caller either two or three letter abbreviation. Enter the number of calls made by hitting the corresponding button.



3.For monthly partners, you enter Yes on the circle, enter a free book if it was by auto debit. Click create detail to go to MP-screen listed above. Then proceed with entering the details of partner; monthly, semi-annual, annual, enter start date of auto debit, click the corresponding date the payment will be taken out. Enter the type of payment, check, cc, or eft. Add cc details. If payment is over $180 by cc and it is a one time. Then, you process cc in the manual process screen. Add notes stating their partnership along with initials stating it was you processing the request.

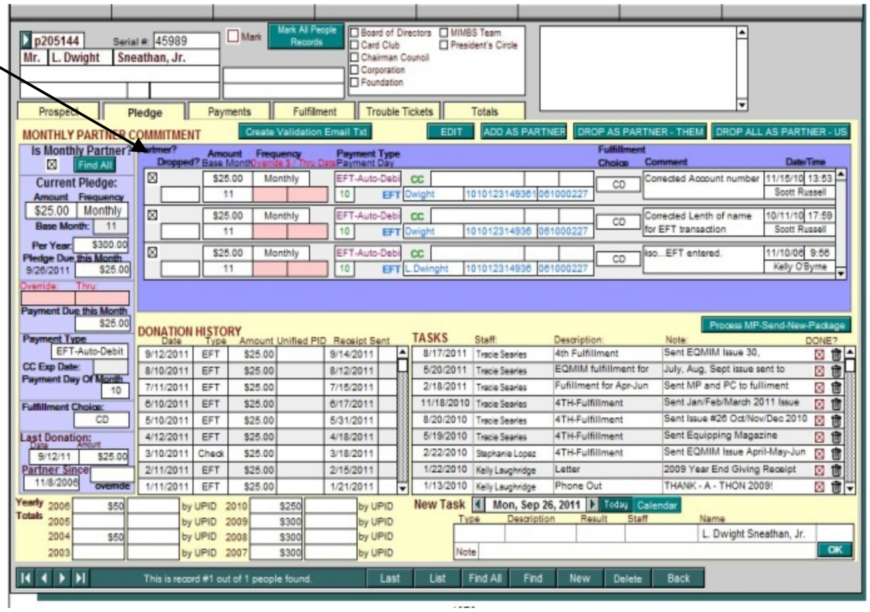
4.For 1x, you enter one time gift, payment type either check or cc. Enter the cc information on the box on the right. If it is not specified click not specified. For one time payments under $180, process cc with authorize.net. After donation is processed click the people record and record under the donation the type of donation and amount. This will populate the amount given by the donor within their people record.

5.After all prospects are entered, once their monthly partner information and or cc information was filled in. Within the regular donor screen, click process monthly partners – send package new package. A letter is then created for the partner stating the appreciation of their gift, the commitment and a half sheet where the donor can enter any necessary information such as cc information by check and their dollar commitment. Also included is the personal id information such as name, address, and prospect id number. From the 10 label screen it will create a personal label for each partner to place on the partner packets. These packets are then mailed.

6.One time gifts are processed through the prospects screen under the cc information shown above on page 2. Find and print 1TG letters will create a letter similar to the partner letters detailing donation and personal information. The letters are then mailed.

Task: <u>Processing Underachiever and Previous Givers (Regular Donor Database)</u>

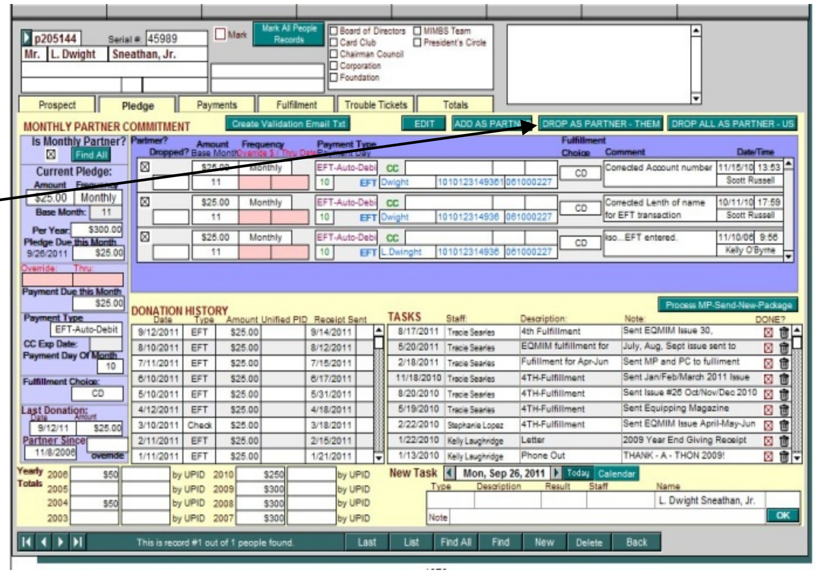
This process could take 30 mins-1hr to process depending on the amount per evening.



1. The underachiever recommitments and previous giver commitments are processed in the monthly partner (regular donor) screen. You can enter updated information similar to procedures at the beginning of this document.

2. The other option is to enter their commitments as a task at the bottom right hand corner of the screen. You can enter the details such as the type (monthly partner, description (underachiever or annual), staff member, and notate the account.

Task: Dropping Partners (Regular Donor Database)



It can take anywhere between 2-4 hrs a day to drop partners depending on the amount.

1. At the monthly partner (regular donor) screen, the individual will click drop partner them. Then, enter the reason, partner requested to be dropped. Enter initials.

Problems/Suggestions:

1. Filemaker does not produce Underachiever and Previous Giver letters to process. The administrator has to create an excel spreadsheet for all the data (such as Salutation, First Name, Last Name, Address, City, State, Zip Code, Book Selection.

2. The administrator has to create a letter within Word stating the Underachiever and Previous Giver commitments.

3. The administrator performs a mail merge to send letters to Underachiever and Previous Givers to commit.

4. The above process can take 1 hr or 2 hrs an evening depending on the amount of letters to process. Thankfully, the letters and spreadsheets are already created so the administrator does not have to create a new format each time.

5. Filemaker does not send emails to the donor stating their cc/eft info is about to expire. A person must take time during the week as well as a caller during the campaign to follow up with them regarding their updated cc information. This can take anywhere between 10 to 15 hrs a week for two people to complete this process.

6. An administrator will create a spreadsheet of the donor results from the processed calls between monthly partners and one time donations. This can take about 30 mins to create and maintain through the week.

7. At the close of the campaign, the names and call sheets are alphabetized. The No's, Can't Reach are processed individually. This is an involved process for administrators and volunteers to complete. It can take months.

8. If a person would like to order EQMIM. There has to be separate follow up whether by email or phone call to the individual to sign up for the magazine. If this was somehow integrated into the database it would be an easy solution.

Printing Issue - When processing labels for partner packets, the print setting does not allow the ability to move where the labels are placed on the label sheet. The administrator is using a new sheet of labels each time. It only prints on the top left hand column then across. Then, there are stacks of unused labels on the right hand column of the sheet leftover.

Administration - Sharon

Task:

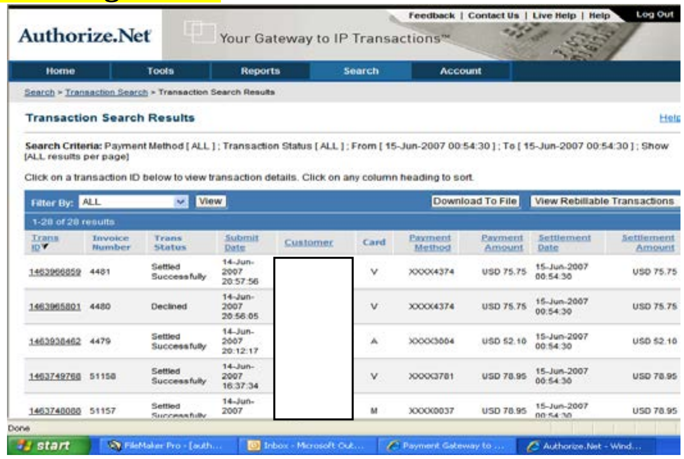
Downloading credit card payments for resources, books, donations, monthly partners, seminars and training events.

Accessing time cards for the purpose of payroll

Deposit Report

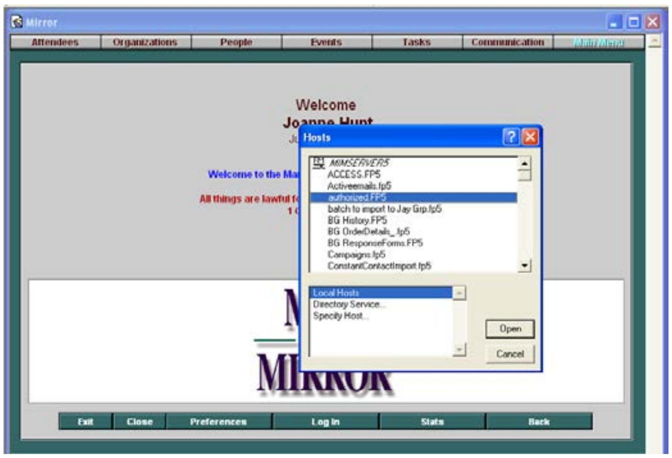
Task: Downloading credit card payments for resources, books, donations, monthly partners, seminars and training events.

How is it done?
Open up authorize.net on the Internet
Search the dates
Download information to Filemaker
Close the internet

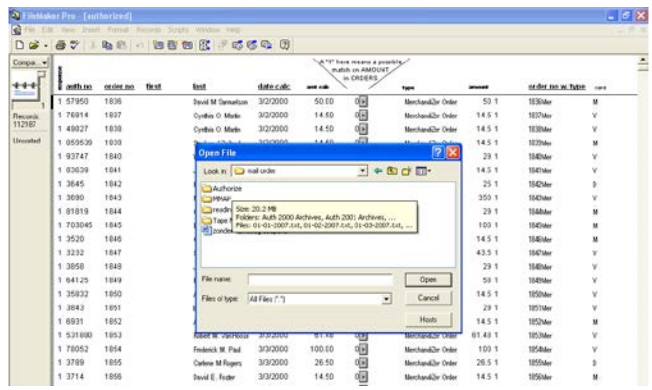


In Filemaker, Open Remote
Click to get to authorize (below)

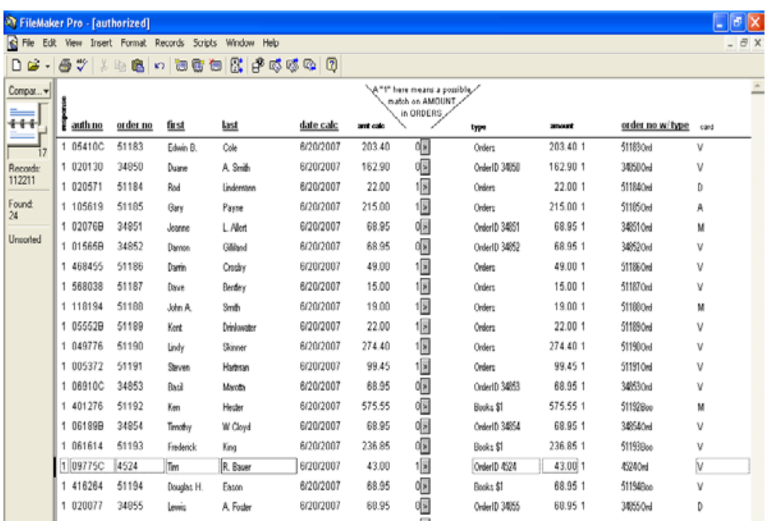
Click again to get to authorize



Then select the current file needed to work on



This screen is used to verify correct formatting of report to be imported.

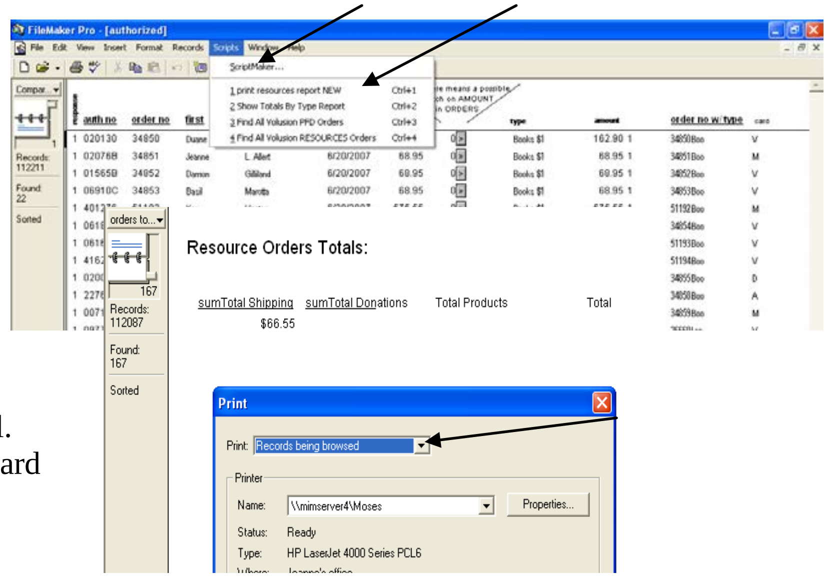


Remove all entries that are not approved (done manually)
Then under Records, sort by Type.

Under Order #, manually change the order number to a MIM number taken from the actual order.

Determine what type of order it is by looking at the description (EqMIM, Resources, etc). If description is Purchase Order, then research type by accessing MIM web orders database outside of FM. With the exception of Books by the Box, all "types" are manually entered, unless the user has added the type in the description fields when processing the order or adding it manually.

Then go to Scripts, and work in #1 and #2

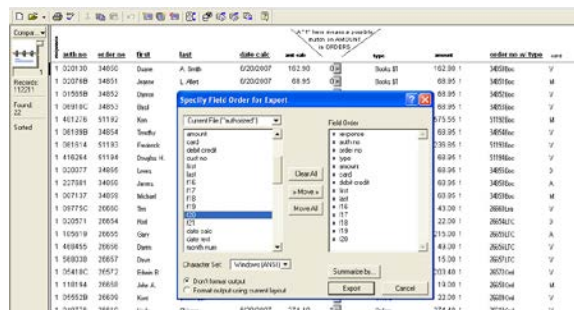


Work in #1 to print the totals

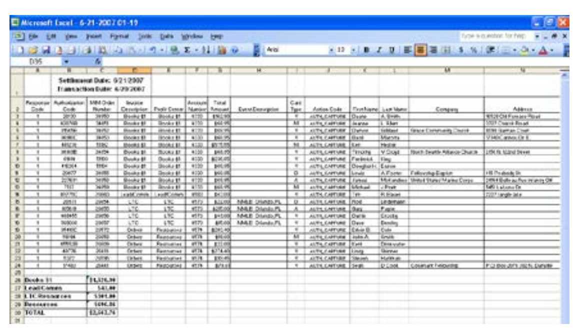
and #2 to show the totals by type.
Go back into Browse mode.

Now this info will be exported into Excel.
Shared Files – Administration – Credit Card Reports

Flip back over to Filemaker, choose the field for export, then export to Excel.



The final report in Excel will look like this:



What is used that is not in Filemaker? The initial credit card order information is downloaded from authorizenet.com

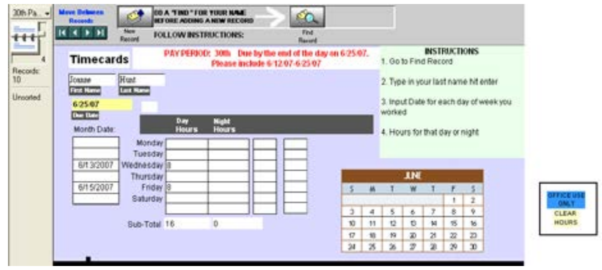
Time Required: That depends on the volume of the orders, but it can be from ¼ hour to 1 hour for each daily report. It also depends on the content of the reports – on Mondays, 3 reports are run for Friday- Sunday.

How is this used outside of Filemaker? The final information is exported to Excel, where accounts and profit centers are assigned.

Problems / Suggestions:

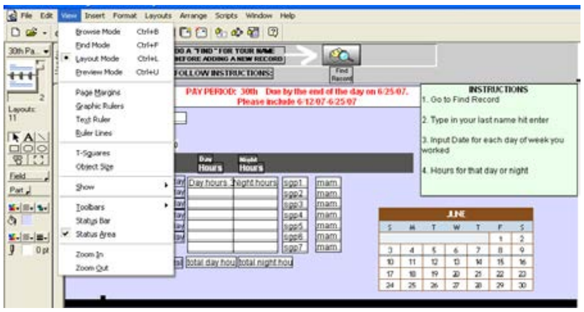
- There is a lot of manual entry done with this process. Since web upgrades, there is more work required to accomplish this task as the type of product does not map over to the uploaded information when anyone orders products from our on line books stores (Resources and Books).
- In Filemaker, it would be really helpful if when typing data into the columns, words that are used repeatedly would show up at the start of typing (as in Excel).
- Filemaker crashes too often when exporting to Excel, and a message appears that says "lost communication". There is no automatic save for this work, and it has to be done all over again.

Task: Accessing time cards for the purpose of payroll

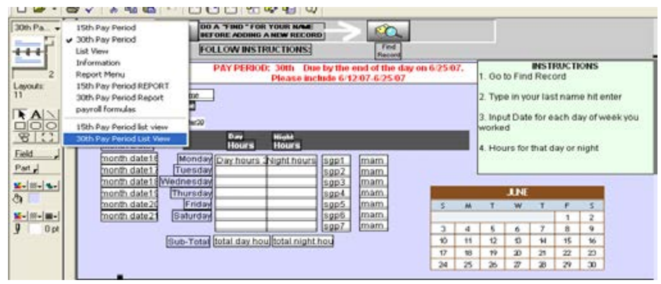


How is it done?
Each employee turns in a paper copy of his/her timecard. With these nearby, Filemaker is opened, go to Hosts – Time Cards

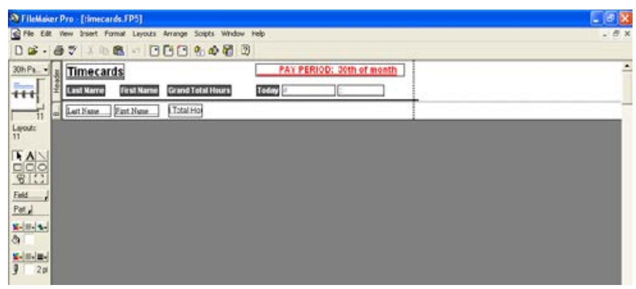
In Browse mode, open to a particular pay period.



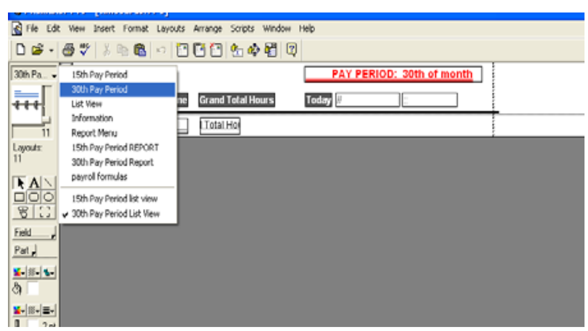
Then, go to layout mode,



Select a pay period to create a list and hit enter.



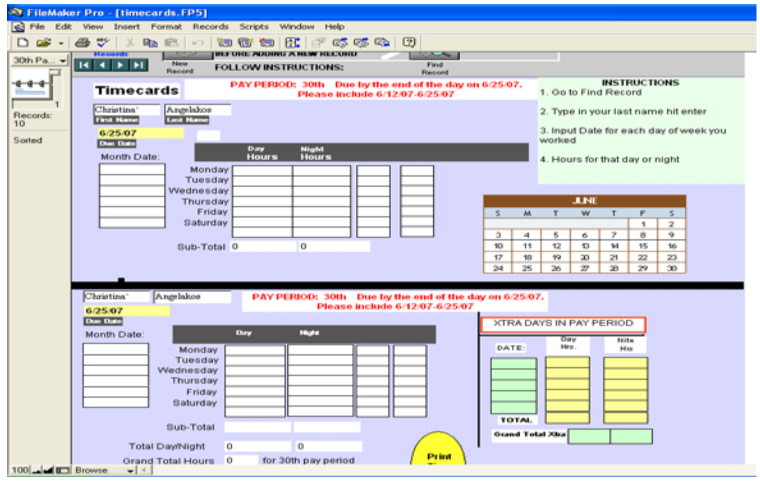
When you click browse mode, the list appears. Sort by employee name and print out.



Go back to layout mode.

Go back to the pay period, click “enter” and you are back at the entry form.

Go back in Browse mode where you can add or delete names at this point.



When everything is verified, clear the hours.

Go back to layout mode, and update instructions for next pay period and update calendar if needed.

What is used that is not in Filemaker? Nothing

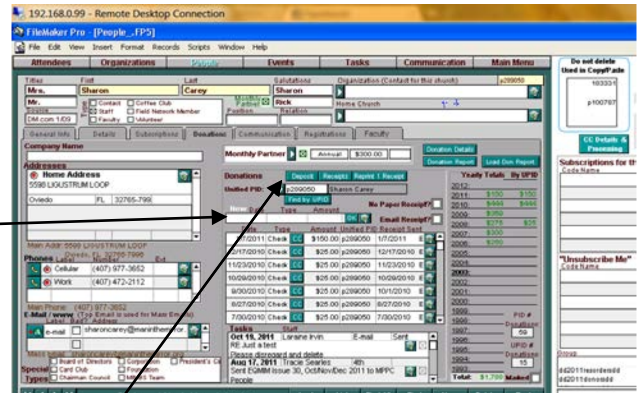
How much time does it take? About 30 minutes twice a month. During the calling season, with more part-time employees, it takes about an hour twice a month.

How is this used outside fo Filemaker? It's not.

Problems / Suggestions: Summary information is available and hardcopies of each timecard is required by law (payroll records cannot be destroyed)

Other opportunities for use:

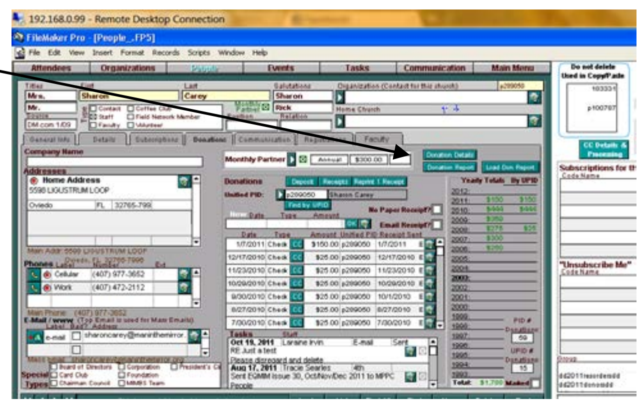
Task: Deposit Report



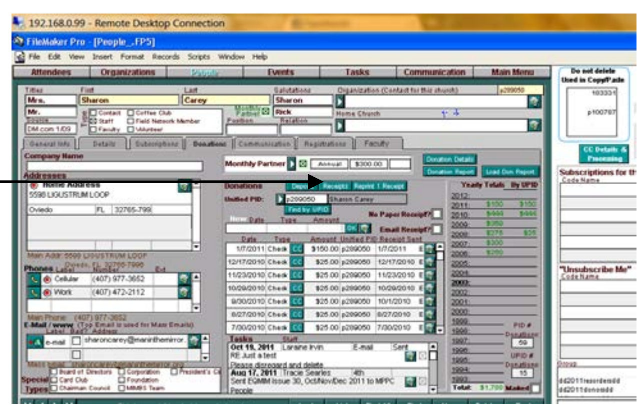
Task: Enter donations in FileMaker
On People Screen
Find donor- Control F
Click on Donation/New Date box. The current date will automatically pop up.
Type will pop up as a check- change to cash or stock if needed.
Enter amount of donation/OK
Find next donor and enter donation till all donation income is posted

When finished with all donations, click on the Deposit
On the next screen, click on Make Deposit. Message Box will ask "Are you ready to run Make Deposit for today?" Click OK
Run tape with total amount of donations while FileMaker is running report
Deposit page appears with the headings – Ensure total and calculator tape total balances.
All other checks/cash will be entered manually on the bottom of the deposit report.
Additional lines Control N
After deposit balances, print one copy and PDF the report to Admin/Daily Deposit Reports

FileMaker/QB reconciliation report
Find all the donations in the time period and print a total amount from filemaker to match with the tape that was run.



From a people record, select Donation Details
Top left (hidden field)—select List of Donations
Control F
Enter date x-xx-xx in date field
Scroll right to Pay field- enter CHE
ENTER
Control B to enter browse mode
Scroll left
Select totals by category
Be sure totals balance on this report and the deposit summary
Print a copy for Monthly Donor manager
PDF copy to Admin/ Daily deposit
Select continue—left side button



Printing receipts
Return to Donation Page
Click on "Receipts"
Print Donation Receipts – email or print receipts

Deposit-
Prepare bank deposit slip

Scan deposit slip and checks/ admin/ daily deposit

Donation Information sheets give to Monthly Donor manager

What is used that is not in Filemaker?
Income that are not considered donations are not recorded in the People record. All ‘other category’ income is provided to MIM staff via a scanned copy of the check. If appropriate, the staff member will record this income in other parts of FileMaker. Jamie is the best source of information here to find out what/where she records in FileMaker.

Time Required:
Depending on the amount of check entered, the deposit can take anywhere from 2-4 hours.

How is this used outside of Filemaker?
The deposit summary produced in FileMaker is printed out and the totals are entered into QuickBooks manually.

Problems / Suggestions:

- The disconnects between FileMaker and Quickbooks
- Not entering checks in a people/organization record if they are ‘other than donations’. Very difficult keeping records on what came in and what is still outstanding. Summit sponsorships are another example of this issue. Sponsorships are not considered donations so they are not entered into FM (at lease far as I know they are not entered).
- If a People record is changed from a Monthly Partner to a PC member, the date of the change is not reflected anywhere so basically all past donations are not credited to PC and not MP so any historical reports you run in FileMaker to not reconcile to QuickBooks.

RESOURCES– Tracie

Tasks:

Processing Resource Orders from the Internet site

Charging Credit Cards for Resource Orders or other things (i.e Seminar contacts, courseware sales, and Summit registrations/sponsorships.)

Create Groups for Marketing Emails

Create Reports

Inventory – How File Maker stores inventory and how we enter a new sku number

Purchase Orders – input what we order for inventory, and keep track of vendors

Generate Reports

Events Database

Red Bandanna

Entering in Blow in Cards into FileMaker

De-Duping Records - Full SOP of Fulfillment attached (#1)

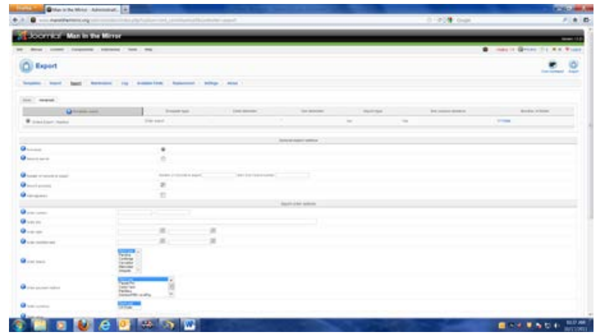
Creating Labels

EQMIM - Tracie

Enter Orders – entering subscription orders

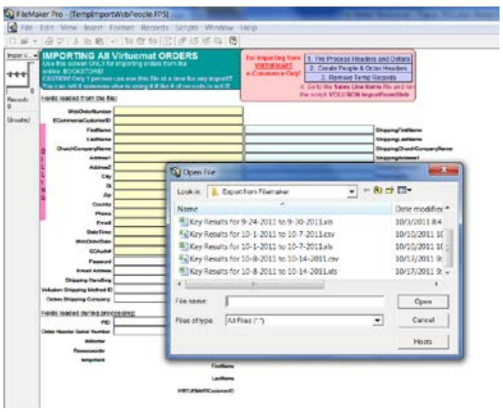
Fulfillment of *EQMIM* - Full SOP of Fulfillment attached (#2)

Task: Processing Resource Orders from the Internet site

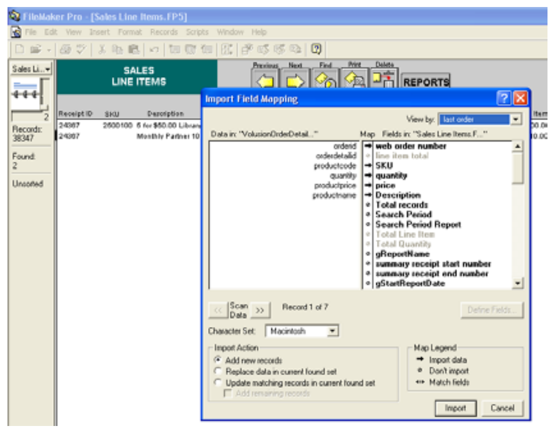


How is it done?
Download orders from the web bookstore.
It becomes saved as an Excel spreadsheet as a CSV file.

Create a new customer if needed (this is automated through Tempwebimportpeople database, see detailed discussion below)



Open Sales Line Items in File Maker, then import the other details from the web.
The mapping screen shows the details of the order.



Records must be de-duped manually.

Print the day's orders.
Paper order goes to shipping.

What is used that is not in FileMaker?
Download orders from web bookstore
New customer information (from phone, email) is put in manually

Time Required: 20-30 minutes to download and process orders daily

How is this used outside of FileMaker?
2 copies of the receipt are printed – the internal receipt is given to the Shipping department; the customer receipt goes with the order. The shipping department is able to print a shipping label from within FileMaker.
Weekly reports are made in File Maker.

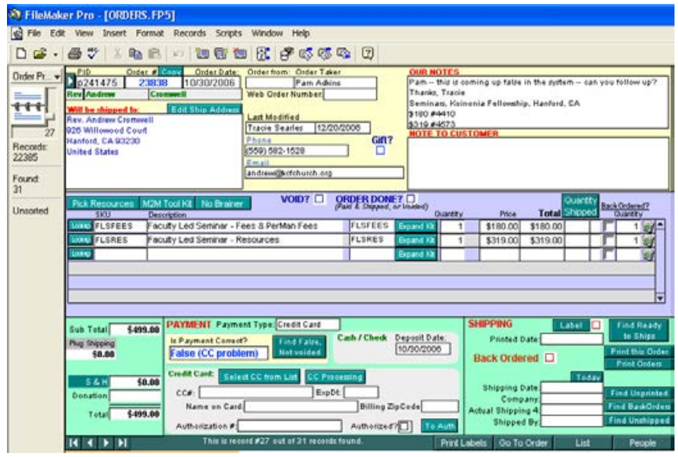
Problems / suggestions:

- **A field is needed for the shipping tracking number in the order database.**
- **De-duping process should be more automatic.**

- **When charging a credit card order in another name, the system automatically defaults to the original name, and has be manually be changed to the name on the card.**
- **If a customer also donates on the web, it gets downloaded to the Orders database then has to be manually put into donations.**
- **If a customer places an EQMIM order online, it gets downloaded to Orders database and then has to be manually put into Small Group Partnership database.**

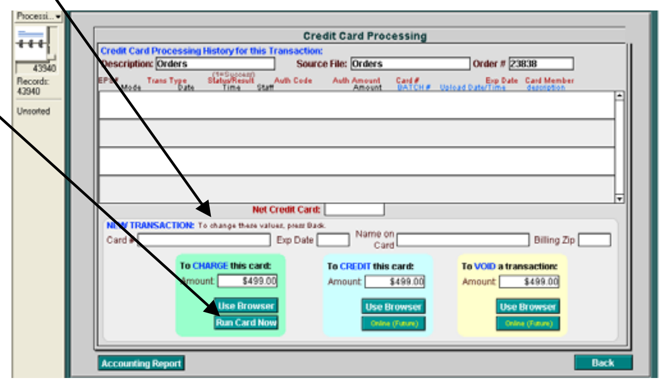
Other opportunities for use:

Task: Charging Credit Cards for Resource Orders or other things (i.e Seminar contacts, courseware sales, and Summit registrations/sponsorships.)



How is it done?
In Orders Database, find "False, not voided", which creates a list.
Charge each credit card one at a time.

Click "Run Card Now" and the card is charged.



Shipping labels are printed in FileMaker.

What is used that is not in FileMaker?
A credit card may need to be checked if it doesn't go through or if it does not give proper authorization.

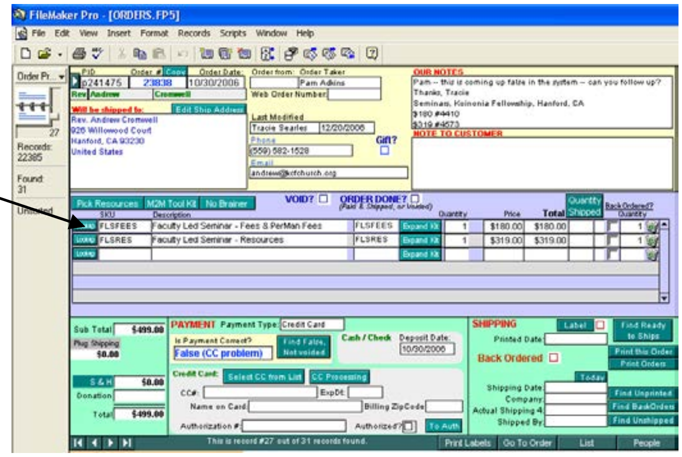
Time Required: 10 minutes a day

How is this used outside of FileMaker? It's not.

Problems / suggestions: none

Other opportunities for use:

Task: Create Groups for Marketing Emails



How is it done?
In the Orders Database, do a search by sku number.
Create a group of the people who ordered a product; export their names and email addresses to Excel.
Send email through filemaker, Word or Constant Contact (mass emails)

What is used that is not in FileMaker?
Excel, Word, Constant Contact

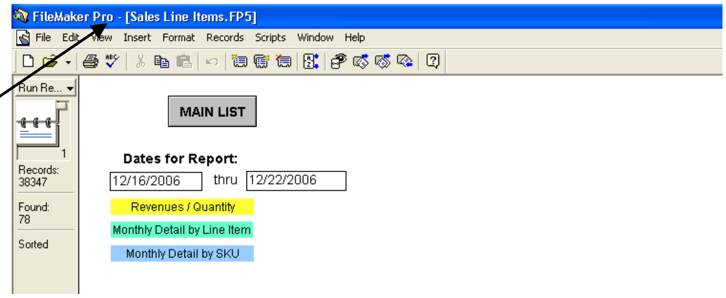
Time Required: 1 hour

How is this used outside of FileMaker? Marketing purposes

Problems / suggestions:
I wish there was an easier way to do this!

Other opportunities for use:

Task: Create Reports
$ total by week
$ total by month
# of items for the month
# of cards sent



How is it done?
Go to Sales Line Items
Click Reports
Enter dates

What is used that is not in FileMaker? nothing

Time Required: 15 minutes

How is this used outside of FileMaker? Weekly reports

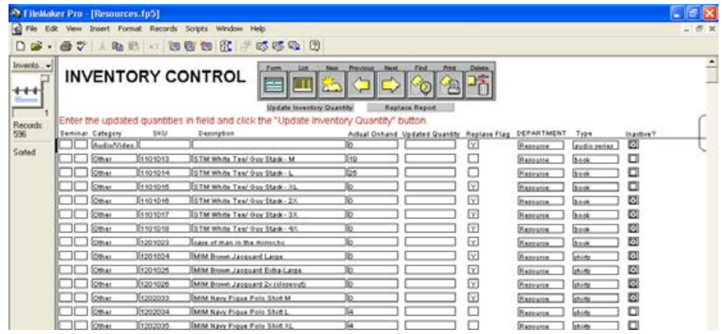
Problems / suggestions: People are allowed to put things in the orders database that are not product orders, so those amounts have to manually be subtracted from the total that the report button produces.

Other opportunities for use:

Task: Inventory – How File Maker stores inventory and how we enter a new sku number

Anything sold on the website or in orders has to be registered here with a sku number.

How is it done?
Open File Maker - Open Remote - Click Resources

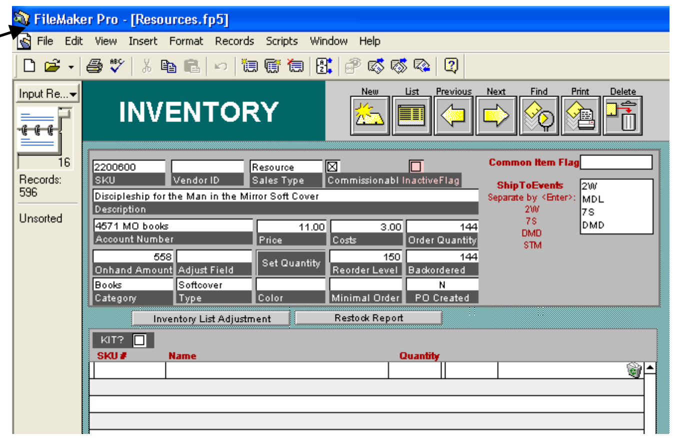


To add a new product –

Inventory sheet is duplicated.
Shows everything we sell.
It can sort.

It can add a new product and a new sku number.

To keep track of inventory – On this page we input product info, including sku, price, costs, number on hand (Order Quantity), Reorder level, whether it is active or inactive, and if it is included in the resources to ship to events.



What is used that is not in FileMaker? New product information

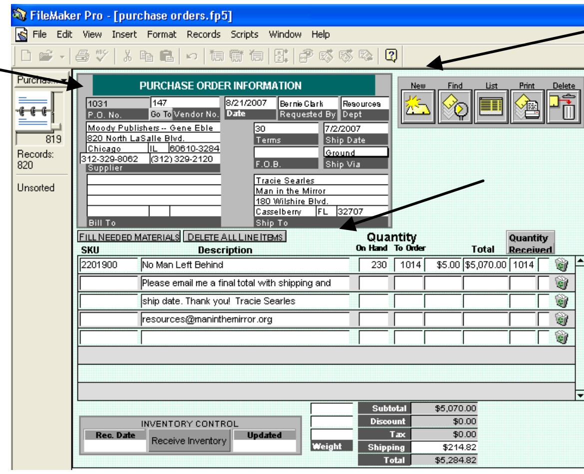
Time Required: 20 minutes
It is updated once a year in December by an inventory count.

How is this used outside of FileMaker? It would be helpful to update inventories sold outside of web and phone orders. I.e. products sold at outside events.

Problems / suggestions:

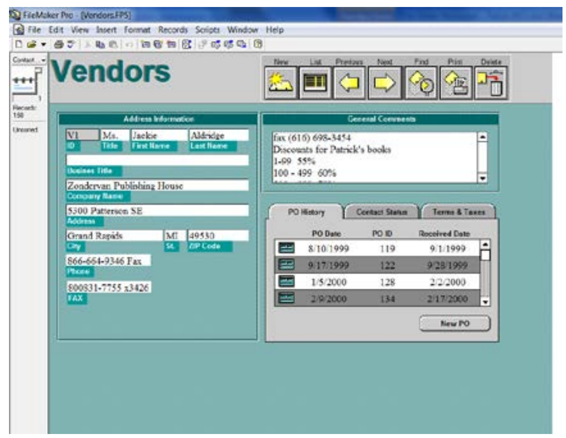
Other opportunities for use:

Task: Purchase Orders – input what we order for inventory, and keep track of vendors



How is it done?
Quantity Received – click that the order came in
New – gives you a new page
Go To – opens new screen for the same vendor
Can enter a new order
Can add contacts, terms and taxes, PO history
Can detail preferences

To enter a new Vendor:
File, Open Remote, Vendors
Fill in all information about Vendor,
Name, contact information, Terms and agreements.
Then create new PO.



What is used that is not in FileMaker?
Staff member sends email to order.
Check with cash flow before placing order.
Get vendor information from the vendor.

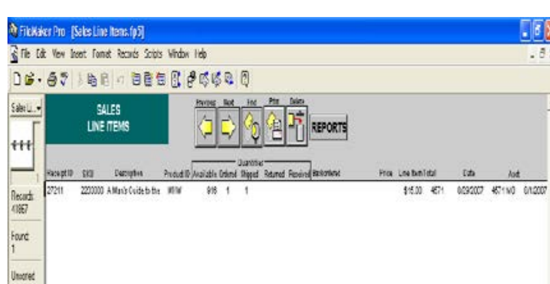
Time Required: 1 – 2 times a month; 30 minutes e

How is this used outside of FileMaker?
A hard copy is printed for the cash flow report and a PDF is sent to the vendor for ordering purposes.

Problems / suggestions:
It would be nice to be able to email purchase orders to people / vendors.
It would be nice if we were able to connect or export orders to the budget plan and/or cash flow

Other opportunities for use:

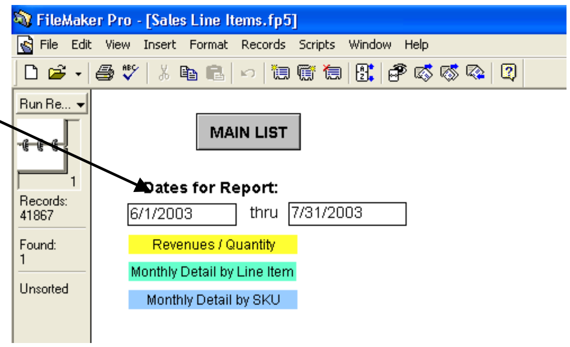
Task: Generate Reports



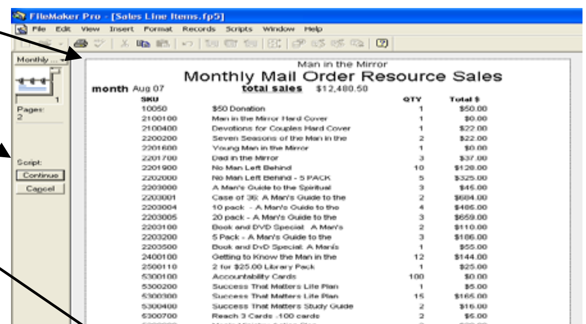
How is it done?
From Sales Line Items page, click Reports

From there, it goes to

Enter dates for the report.
Click the report you want – Revenues / Quantity gives you total sales numbers



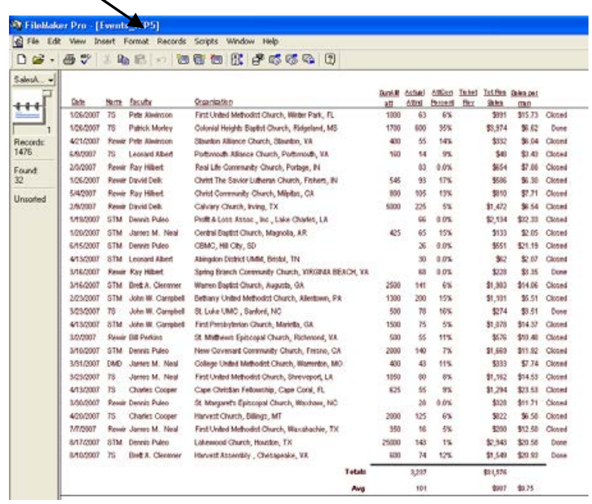
Monthly Detail by SKU shows all sales for that time period. It is now exported to an excel CSV file for easier manipulation of the data.



These figures go to the report for the staff meeting and weekly report for (supervisor)

Then go to Events Database

Sales and Attendance report
Find by dates
Shows all event and sales dollars
Gives averages for report



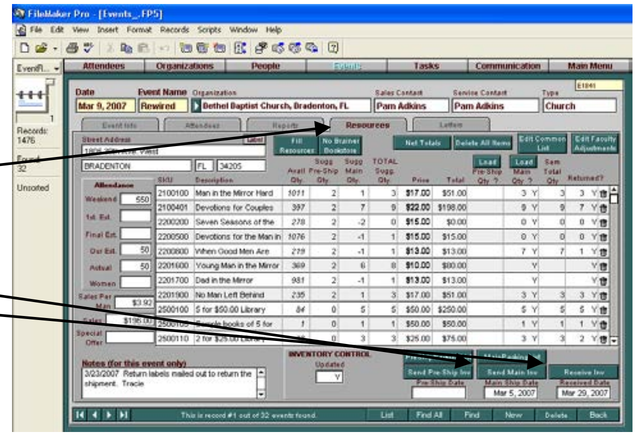
What is used that is not in FileMaker? n/a

Time Required: 20 minutes

How is this used outside of FileMaker? reporting

Problems / suggestions: It would be nice somehow to eliminate items for reporting that aren't really Resource orders.

Other opportunities for use:



Task: Events Database

How is it done?

Click on the Resources tab

Input the information

Click Send Main Inv

Click Receive Inv

What is used that is not in FileMaker?

Time Required:

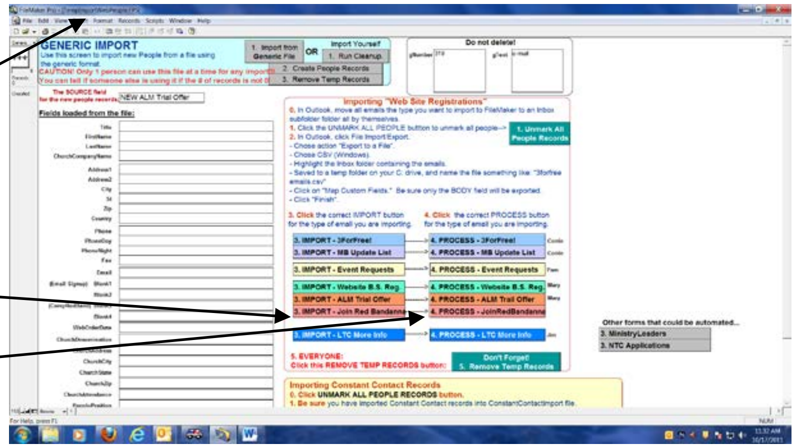
How is this used outside of FileMaker?

Problems / suggestions:

Other opportunities for use:

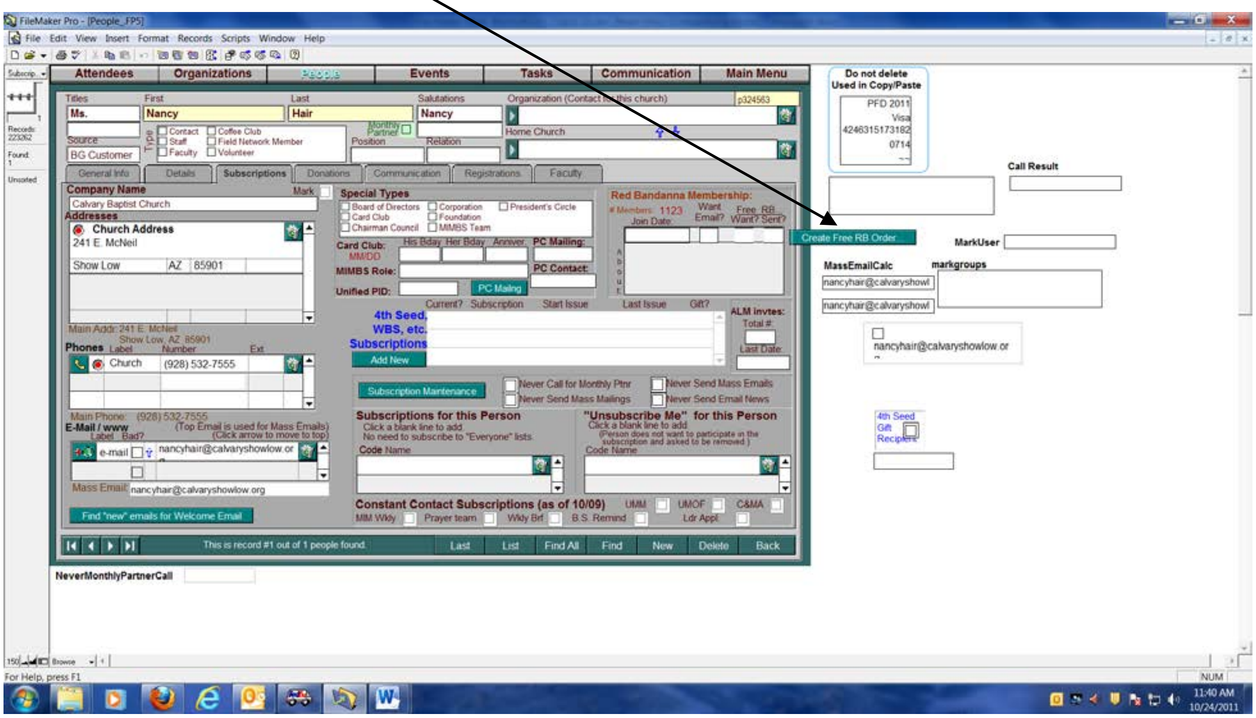
TASKS: Red Bandanna

People sign up to join the fellowship of the red bandanna and receive a free bandanna in the mail.



Go to file, open remote, go to tempimportwebpeople, and go to generic import
Follow the directions from this screen below: under section 3 and 4 hit import for Join Red bandanna, then process joinredbandanna

Then go to the People screen and show marked. Then go to subscriptions and hit button that says Create Free RB order. Then print orders from Orders database.



What is used that is not in FileMaker? Outside email fields from Outlook.

Time Required: 15 minutes

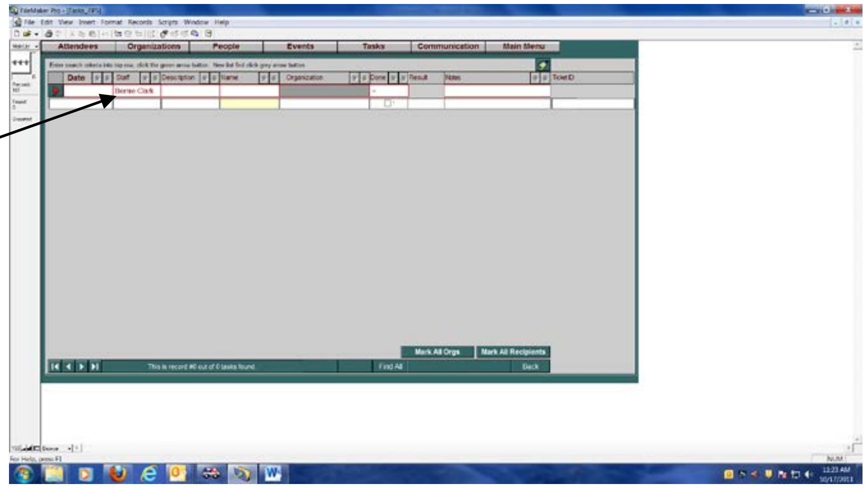
How is this used outside of FileMaker? To send people their Red Bandanna and welcome to the Fellowship of the Red Bandanna group.

Problems / suggestions:
Other opportunities for use

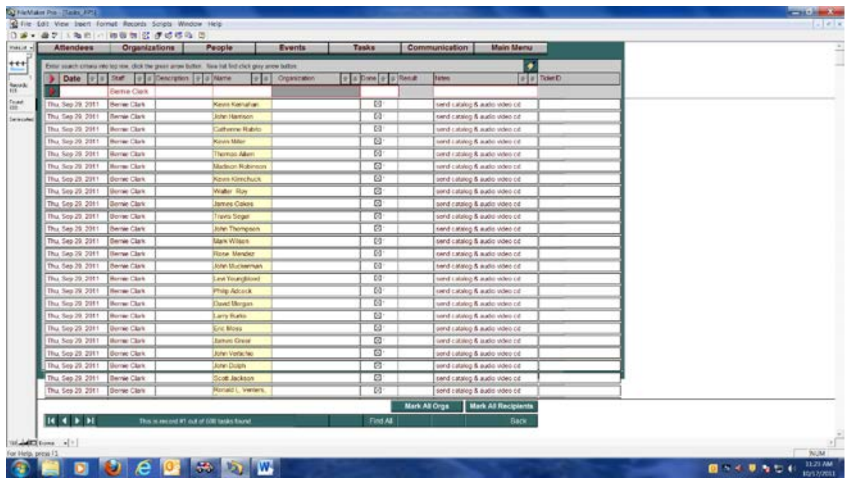
Task: Entering in returned marketing postcards into FileMaker

Postcards come in through the mail and are entered into Filemaker as a Task under Bernie Clark.

Type into the task – "Send catalog and audio video CD".



First you go to Tasks, Then all tasks, then select Bernie Clark's records, then do a find = on the done field. This finds all of Bernie's tasks that have not been completed, which are your postcards.



Pull labels in for each person marked under the drop down menu over the rolodex. Print labels. Then go to scripts and mark all done.

Mail the packages.

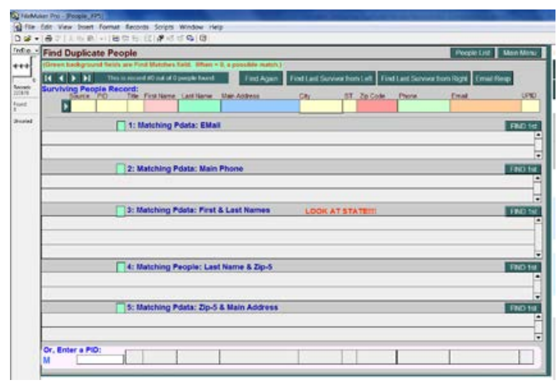
TASK: De-Duping Records – See Attached SOP for more details (#1)

Within the FileMaker database, often we end up with more than 1 record in the PEOPLE database for the same person. (This also happens for the churches in the ORG database. See separate instructions for merging ORG records.) Duplicate records exist for several reasons: their information is imported, or someone did not look up their name first before entering something new, or because someone did try to look up their name before entering something new, but for whatever reason (spelling, mistake, etc) they did not find the person. In any of these cases, a new (and second or third…) people record was created for the person.

The purpose of this procedure is to combine the information from multiple records of the same person back into a single record. It's important to have all information about the person under one record so we correctly understand their level of activity as we make selections in the database to do a variety of things.

Search for groups of people that may contain duplicates

There are two ways to do this. The first is to find duplicates from within the find duplicates area across all the records in the database. This can be time-consuming and virtually impossible to complete. The other is to dedup a particular set of records. For example, after importing web orders you would want to dedup those 20 or 30 records.



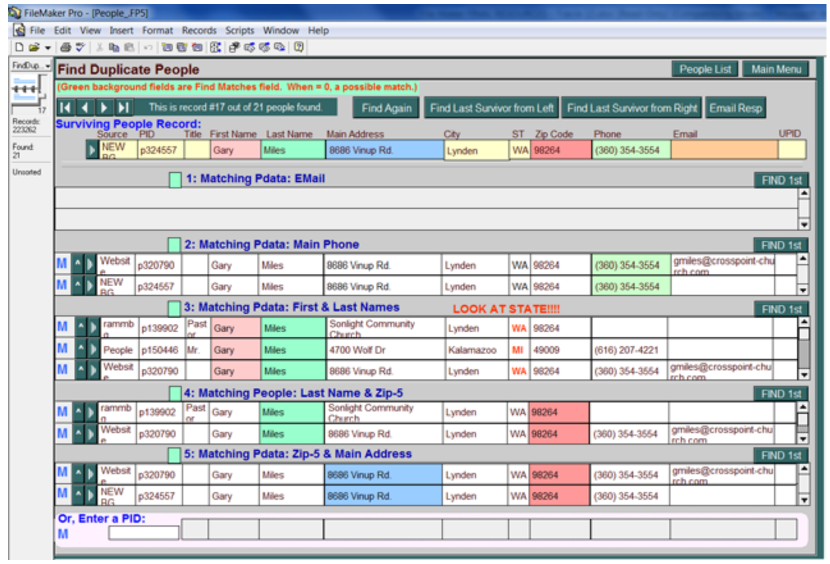
How to use the Find Duplicates area to find possible duplicates:

1) Go into the People list screen.
2) Click on FIND DUPLICATES button at the bottom of the People list screen.
3) This takes you to the find duplicates area.

FIND BY EMAIL:

1) Put your cursor in the green field to the left of "1: Matching Pdata: Email" (it's not pulling this function all the time, but if the email was the same it would show up here)
2) Press CTRL-F to go into find mode.
3) Type a "0" into the input field where your cursor is.
4) Press CTRL-Enter to do the find.
5) Click PEOPLE LIST.
6) Click GROUPS MENU
7) In the Group Name field, enter a new group name as follows:
   dedupe.2005.09.01.email (put today's date instead of 2005-09-01) and press ADD.

FIND BY PHONE:



1) Repeat the same steps as FIND BY EMAIL, but use the green field to the left of "2: Matching Pdata: Main Phone" to do the find.
2) Create a group name of:
    a. dedupe.2005.09.01.phone (put today's date instead of 2005-09-01)

FIND BY FIRST AND LAST NAMES:

4) Repeat the same steps as FIND BY EMAIL, but use the green field to the left of "3: Matching Pdata: First and Last Names" to do the find.
5) Create a group name of:
    dedupe.2005.09.01.firstlast (put today's date instead of 2005-09-01)

FIND BY LAST AND ZIP-5:

6) Repeat the same steps as FIND BY EMAIL, but use the green field to the left of "4: Matching People: Last Name and Zip-5" to do the find.
    a. **AND as part of the find, put a "*" in the ZIP CODE field in the Survivor's record at the top of the screen.** (This will get rid of people that don't have zip codes, and save a lot of time in manual deduping.)
7) Create a group name of:
    dedupe.2005.09.01.lastzip (put today's date instead of 2005-09-01)

FIND BY ZIP-5 AND MAIN ADDRESS:

8) Repeat the same steps as FIND BY EMAIL, but use the green field to the left of "5: Matching Pdata: Zip-5 and Main Address" to do the find.
    a. **AND as part of the find, put a "*" in the ZIP CODE field in the Survivor's record at the top of the screen.** (This will get rid of people that don't have zip codes, and save a lot of time in manual deduping.)
9) Create a group name of:
    dedupe.2005.09.01.zipaddress (put today's date instead of 2005-09-01)

STEP 6: Do automatic and manual processing against possible duplicates.

However you have created a found set of records, you can remove duplicates through a combination of automatics and manual processing. Use the button on the right hand side of the screen to automatically merge those records that are a definitive match (sames names and address for example.)

After this is finished, go back through these records and manually look for all possible duplicates.

The record to be merged into (called the Survivor) is at the top of the screen. Your task is to see if any of the possible matches that the computer found is indeed a match. If it is, you will tell the computer to merge the record into the Survivor at the top of the screen.

General Rules to Follow:

- Merge any probable matches of records with no name into records that have a name.
- Merge any probable matches of records with a last name of "UNKNOWN" or something like that into records that have a name.
- The source field displays where the record originally came from. Try to merge people from the sources of lower priority into those of higher priority.

HIGHEST	Source = Partner.
	Source = People.
	Source = BG Customers.
LOWEST	Source = Attendee.

- To move a record to the top to merge into it, click on the green button with the "!" on it. This will put it at the top. Remember the PID of the record that was at the top, find it in one of the sections, then click on the Blue Up Arrow to merge it.
- You cannot merge a Faculty record (one of our speakers) into another record. You can only merge INTO a Faculty record.
- If you are unsure about a match, write down the PID of the Survivor at the top of the screen and we can come back to it later.
- Remember that the Address might be the person's home address, business address, etc, or the address of their organization. If the address on one record looks like a church, but on another record looks like a home, and both addresses are in the same city or metro area, then it's probably a match.
- Remember that the Phone number might be the person's home phone, work phone, cell phone, etc, or the phone number of their organization.
- The possible match is really just the first record in the section. Just look at that one. The other possible matches will be displayed as the first record in the list when we go through the list again.
- If you are unsure whether or not it is a match, **we want you to err on the side of NOT merging the records.** (However, each section has different levels of probability. See the discussions below.)

If you are doing Section 1, Email:

Find the group of people with the group name "dedupe.2005.09.01.email" (use the correct date) , or work within your own group of records.

- There is a high probability that the possible matches shown in this list are really thbe same people. An email is tracked by a person and not by Org, so the email listed is that person's and usually not shared with anybody else.
- Assume it is a match, unless the names are really different. If the addresses are different, then the person probably moved, but his email remained the same. So assume they are the same person.
- Click on the Blue Up Arrow to merge the duplicate into the Survivor.
- Look at each of the possible matches in section 1 and decide which are really matches.

Go to the record and unmark any “main addresses” except for the most recent. This should be the last marked one on the list of addresses.

If you are doing Section 2: Phone:
Find the group of people with the group name “dedupe.2005.09.01.phone” (use the correct date), or work within your own group of records.

- A phone can help find a person. But be careful. The phone number that this match is based on is either: the person’s main phone number (although the person can have many phone numbers on file), or if the person does not have a main phone number and the person is a contact for an organization, then this is that organization’s phone number
- Therefore, the phone number the match is based on might be an organization’s phone, and all the contacts for that organization will be listed.
- Only assume a person in Section 2 is a duplicate only if (a) the names look the same, and (b) the other information helps confirm this.

If you are doing Section 3, First and Last Names:
Find the group of people with the group name “dedupe.2005.09.01.firstlast” (use the correct date), or work within your own group of records.

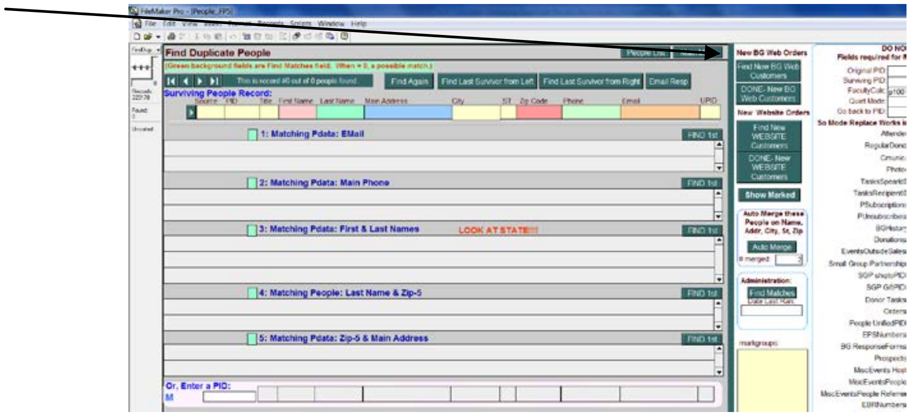
- The probability of finding a duplicate just on the person’s names will depend on how common the name is.
    - If the name is common, you will find many possible matches. You will have to look at the addresses and phone and email to help you decide. Look at the matches in the other sections for help.
    - If the name is uncommon, and a match is displayed, you probably have a duplicate. But again, look at the other fields for additional confirmation.

If you are doing Section 4, Last Name and Zip-5:
Find the group of people with the group name “dedupe.2005.09.01.lastzip” (use the correct date), or work within your own group of records.
Confirm a true match before merging.

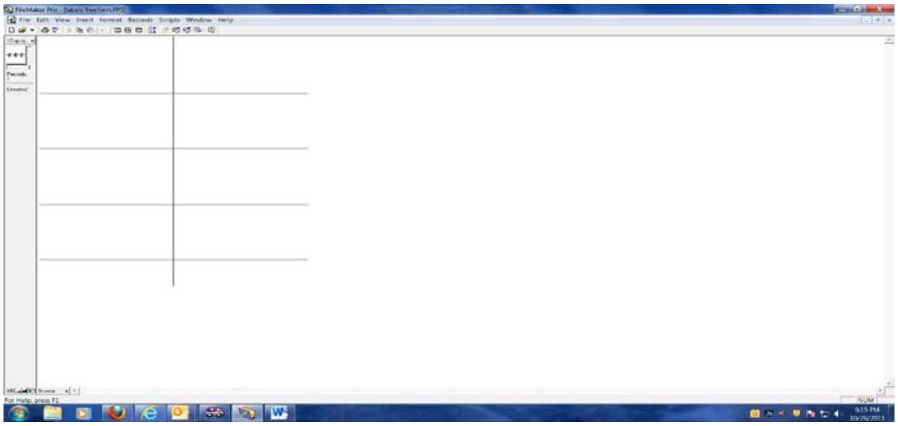
If you are doing Section 5, Zip-5 & Main Address:
Find the group of people with the group name “dedupe.2005.09.01.zipaddress” (use the correct date).
Confirm a true match before merging.

There are four buttons used for deduping resources and books by the box. They are Find New Website Customers and Done New Website Customers, and Find New BG Web Customers and Done – New BG Web customers.

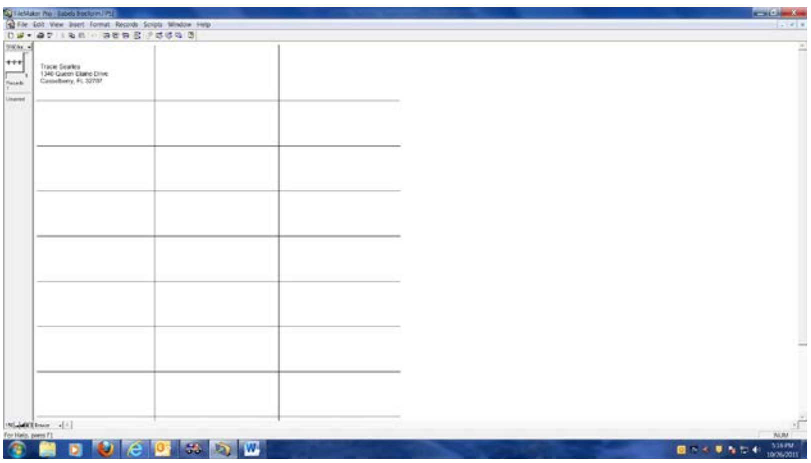
Click on find button first and dedup, then click done for that particular group.



TASK: Creating a Groups of Labels
Using FileMaker to create a group of labels.
Go to Labels Freeform
There are 2 screens I use: 10 UP labels



And 5160 Labels – click to put the person's address in any cell and print the labels. You must delete the addresses or they stay in there forever (or until someone removes them)



EQMIM - Tracie

Task:

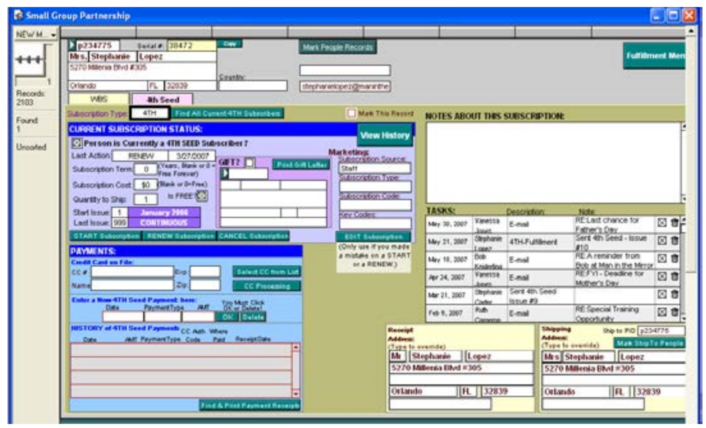
Enter Orders – entering subscription orders

Fulfillment of *EQMIM* – mailing every quarter

Full SOP of Fulfillment attached #2

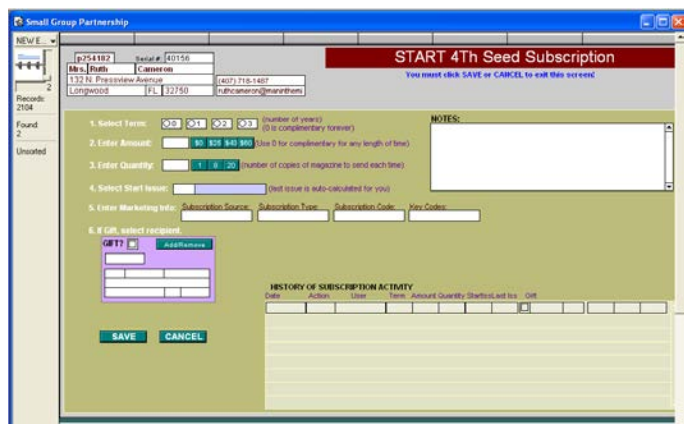
Task: Enter EQMIM Orders – entering subscription orders

How is it done?
In the People screen, open up a name and open the Subscriptions tab.
Click link for EQMIM (right now everything says 4th SEED) subscription. .



If it's a new subscription, click START. Fill info on start screen
If it's a renewal, click RENEW.
If it's to cancel, click CANCEL.
If it needs to be edited, Click EDIT

Fill in all information in Subscription Status box.
Enter Payment information.
Run the credit card (processes through authorizenet.com)
Run credit card on previous page.

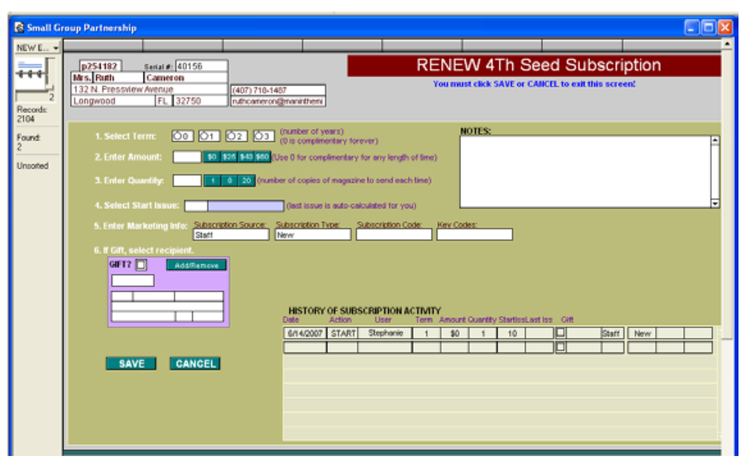


Print Receipt and labels.
Print Gift Letter if needed.

Problem to be fixed if possible - When editing Gift subs – the history doesn't store who got it and for how long.

Follow steps shown
Document in FileMaker
Same for receipt or gift letter

When FileMaker input is complete, send the actual magazine in the mail.



What is used that is not in FileMaker?
Information for subscriptions comes from the mail, phone calls and from the website.
and Tracie pulls all orders off web, phone, and mail, and calling program and enters them in FileMaker

Time Required:
Less than one hour weekly for all subscription tasks (not including fulfillment).

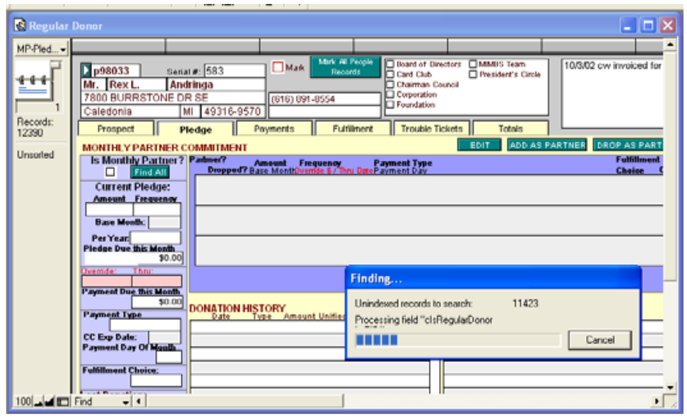
How is this used outside of FileMaker?
The fulfillment list is exported into Excel and emailed to fulfillment house.
Printing of receipt / gift letter, mailing current issues out or next issue out during fulfillment.
Each expiring sub gets a magazine and a reminder letter to renew, each expired sub gets a letter only to renew. Each gift recipient gets a letter to renew as well and the gift giver.

Problems / suggestions:
De-duping
Manual entry of web orders
Automatically recording task of payment by check or cc would be helpful – I record these payments now manually(credit card payment is recorded automatically if cc run in FileMaker).
Task list for Fulfillment list is lengthy and very time consuming.
It would be helpful if receipts and gift letters could be captured at the same time.

Other opportunities for use:

Task: Fulfillment of the *EQMIM* – magazine mailing every quarter

FULL SOP ATTACHED - #2 Refer to this to see how to actually process the subscribers. Below is information about those who receive complimentary issues of the magazine.



How is it done?

The monthly partner list is created.

Log in to FileMaker, click File, Open Remote

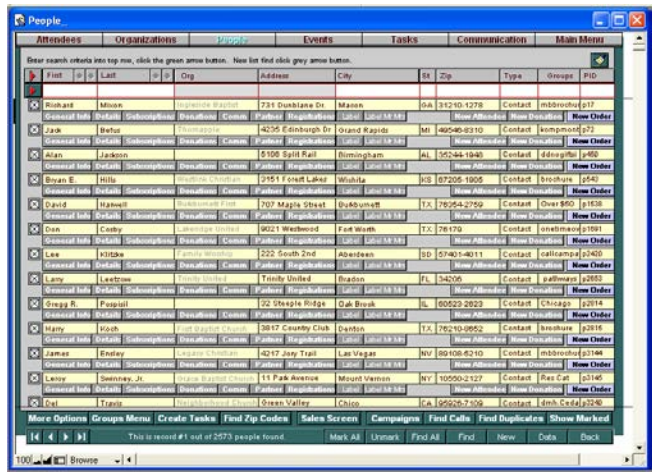
Select "Regular Donor" from the list

Go to MP-Pledge layout.

Click Scripts, then "Find for EQMIM Export".

When it asks, click unmark all marked records. They system then marks all Monthly partners for inclusion in the magazine mailing.

Return to the People file.



Create the list of President's Circle members.

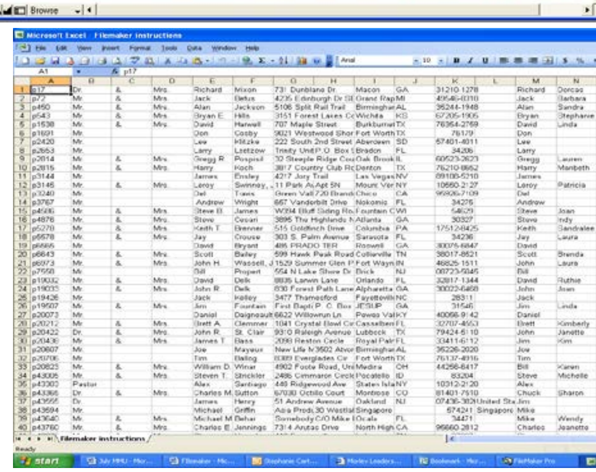
Go to Subscriptions layout of on any People record.

Click Scripts, then click "Find PC for EQMIM Export"

Mark found set of people – OK

Click the List button to return to the people list screen.

Click Show Marked and it will give you both MP and PC people.



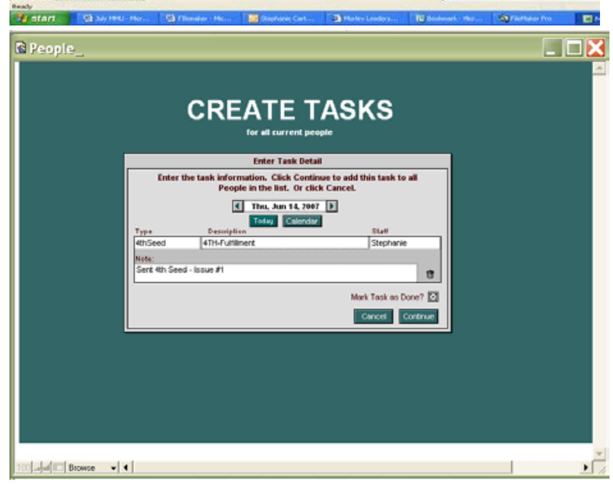
Export MP/PC list

Go to People List screen

Click Scripts, then "Export for EQMIM Fulfillment"

Save as a CSV file (comma separated value)

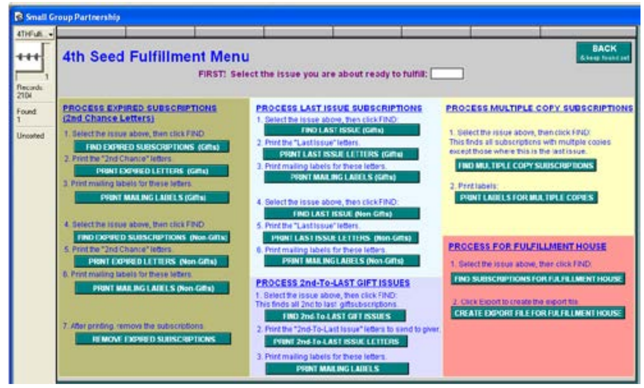
Specify field order, then export.



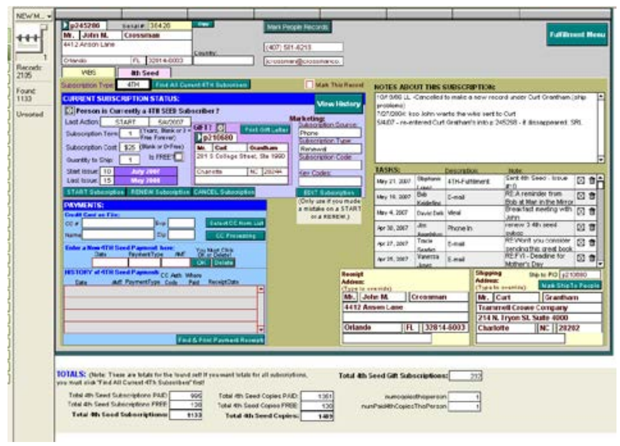
Add the task to the MP and PC people to show that they received this issue of the magazine

Go to People List screen, click Show Marked. Click Create Tasks, enter Task Detail – date, type, description, your name, then notes. Mark as done, then Continue.

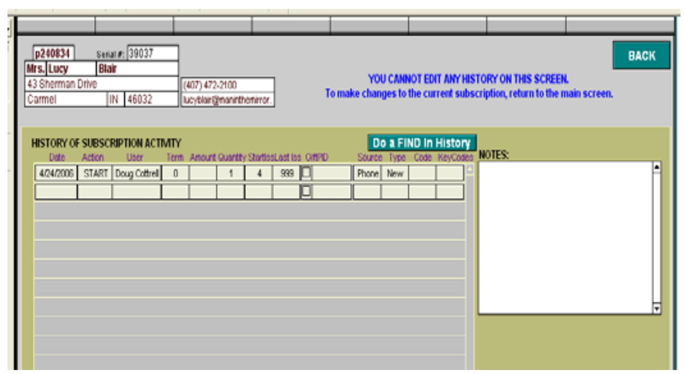
Eliminate expired subscriptions. They receive a special letter, but not a magazine.



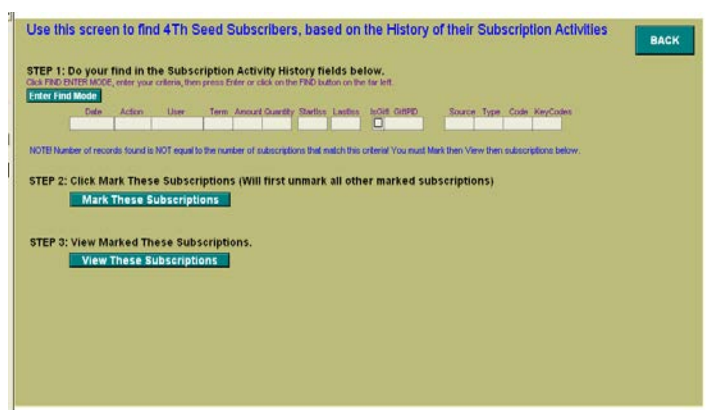
In FileMaker, go to the Small Group Partnership file, then to the EQMIM Subscription layout.
Click Fulfillment Menu
From this screen, you will
Process Expired Subscriptions (green box) following the prompts.
Print expired letters, both for subscriptions that are gifts and non-gifts.
Print labels, both for gifts and non-gifts.
Process Last Issue Subscriptions (light blue box) following the prompts.
Find Gifts, print gift letters and print gift labels.
Find non-gifts, print non-gift letters and non-gift labels.
Mail these copies.
Repeat with Second-to-Last Gift issues.
Print out letters and mailing labels.
Mail.
Process Multiple Copies Subscriptions (yellow box) following the prompts.
Then find all EQMIM subscription recipients who have not already been fulfilled at the MIM office. These will be fulfilled by the fulfillment house. Still in Attachment #8, go to the coral box. Click the green boxes and follow the prompts. Create the export file, save as a CSV file, specify fields and Export.



Both of the saved files need to be emailed in Excel to the fulfillment house.



Add a Task note to each EQMIM subscription recipient saying that they received their magazine. (see next section for screen image)
FileMaker, Small Groups Partnership, EQMIM layout, Find All 4th. Mark Ship To People – (unmark all when it asks).
Go to People List, Show Marked, Create Tasks.
Enter Task Detail – date, type, description, 4th Fulfillment, name, notes, mark as done.
Continue.



What is used that is not in Filemaker?
Information for new orders come from the internet, phone, fax or mail and must be entered manually.

Time Required: Half day (4 hours) is needed every 2 months for the computer work; another half day or more to do the actual assembling and mailing of the pieces.

How is this used outside of FileMaker? The CSV or Excel files are emailed to the fulfillment house. Reports are created for weekly staff meeting. This is all done manually, starting at the EQMIM subscription page. From you can find new or renewed or canceled subscriptions by specific date range, etc. Numbers are added manually for a total.

Problems / suggestions: It would be nice if there were a way to make a combined search for Monthly Partners, President's Circle and subscribers all at once instead of each one separately. "Mark Tasks" takes a long time and ties up FileMaker, up to an hour each fulfillment.

Another problem is that the gift receipt letter and the label don't match. The gift receipt letter is made out to the gift recipient and the label is made out to the gift giver. This has to be manually fixed with every fulfillment.

It would be nice if we could track referrals and give discounts for those who get people to sign up through referrals.

Books for About $1–Risé/Tracie

Task:

Book/Resource Order Input and Fulfillment

Importing Web Orders from Virtue Mart for both Resources and BOOKS

Create an order via the telephone/Manual

Current Year Tracking

Batch Import to Jay Group

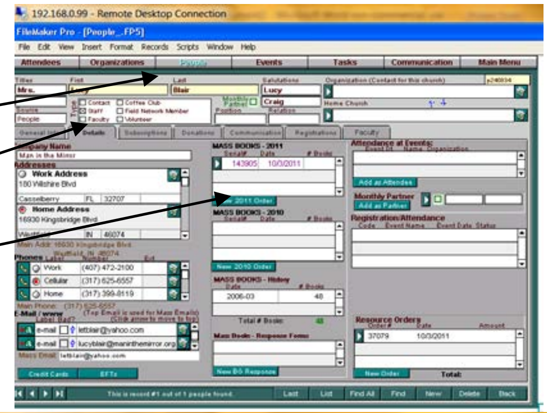
Mass Books Totals

Order Screen

Sending Confirmation E-Mails from Filemaker

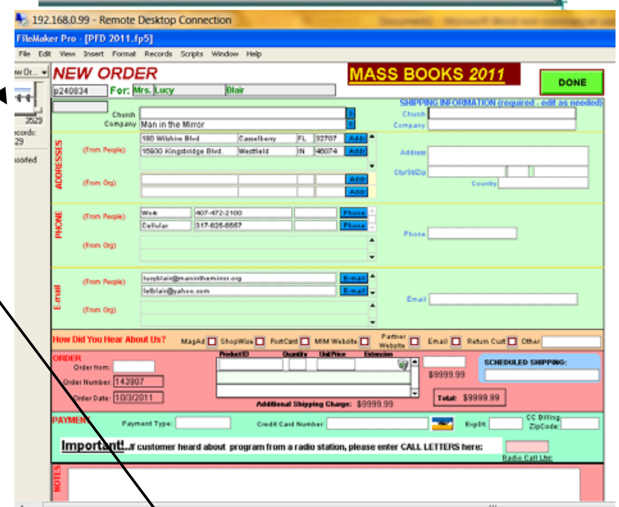
Department: Books for About $1–Risé/ Tracie

Task: Book/Resource Order Input and Fulfillment



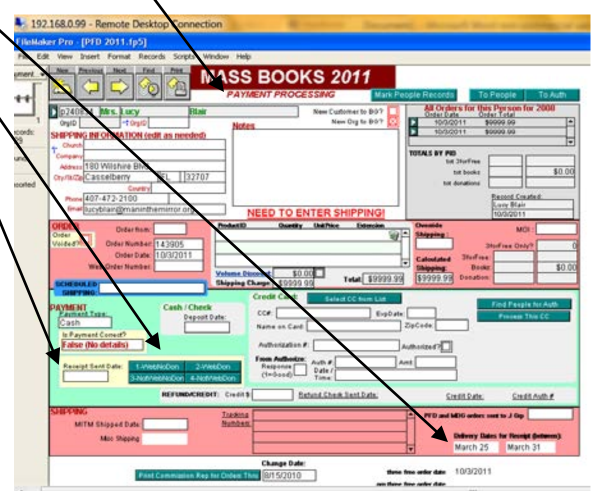
How is it done?
Open the People screen, select Details and go to mass books.

Clicking on the tab marked New 2011 Order will take you to the input screen. We keep Current Year and Prior Year access to actual orders. All fields on New Order Screen are necessary. When you hit "Done" – it takes you back to People Screen and would prefer to take you directly to Payment Processing Screen. Use all fields except "Radio Call Letters" field



In order to edit any information, and to process the payment, go to Payment Processing Screen, (below)

- Change data on the order
- Make notes
- Charge credit card
- Print receipts (have four choices in green only need only 1 choice "NotWebNoDon")
- Delivery Date Field needs to default to blank
- Receipt Date Sent default to Web Order date



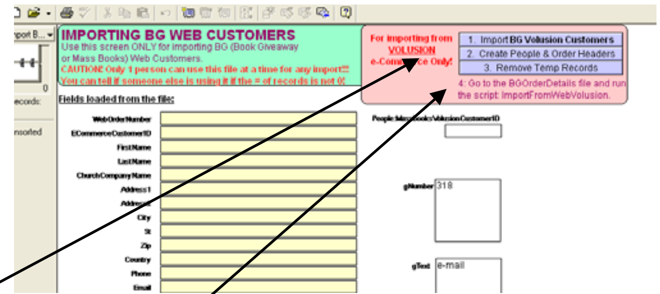
What is used that is not in FileMaker?

- Order information to input comes from VirtueMart, e-commerce, phone calls, faxes or the mail.
- After the order is fulfilled by the Jay Group, the tracking number comes back in Excel by email and is imported back into the database.
- The tracking number is then emailed from FM to the customer.

Time Required: This is done daily, perhaps 5 minutes per order.

How is this used outside of FileMaker?
All fields exported through Excel as needed
Problems / suggestions: No problems with this task. Suggestion: Order receipt automatically emailed to recipient

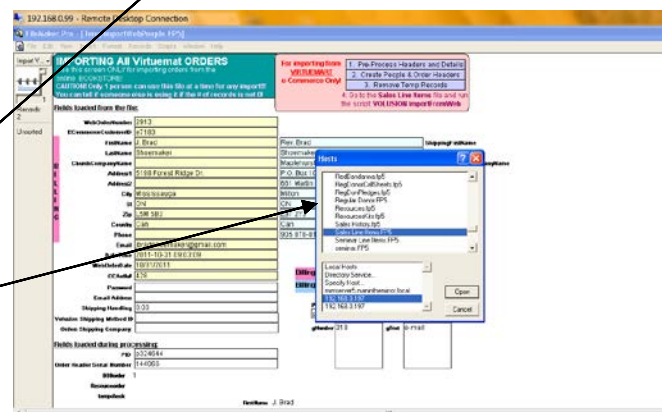
Task: Importing Web Orders from Virtue Mart for both Resources and BOOKS



How is it done? (THESE NEED TO BE Done IN THIS ORDER) From the TempImportWebPeople database

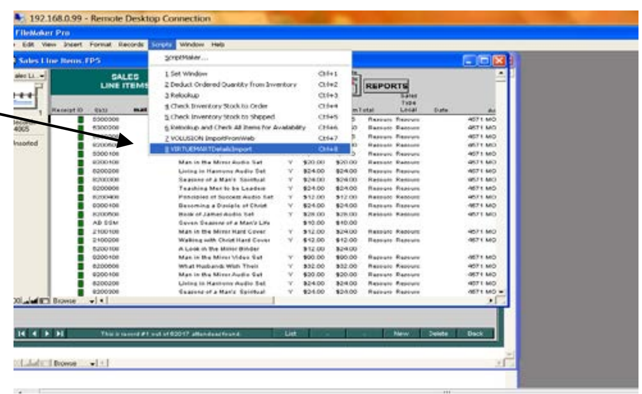
Generic Import All VirtueMart orders

1. Go to VirtueMart & download orders
2. Purple tab #1 imports all the header information about the orderers (name, address, etc.) into this temporary holding database
3. Purple tab # 2 creates the actual people records and then creates an order record in either the Books by the Box database or our regular Orders database as appropriate.
4. You now need to load the actual items purchased into the line items databases. We will first import details for regular resource orders, then import details of Books By the Box purchases.

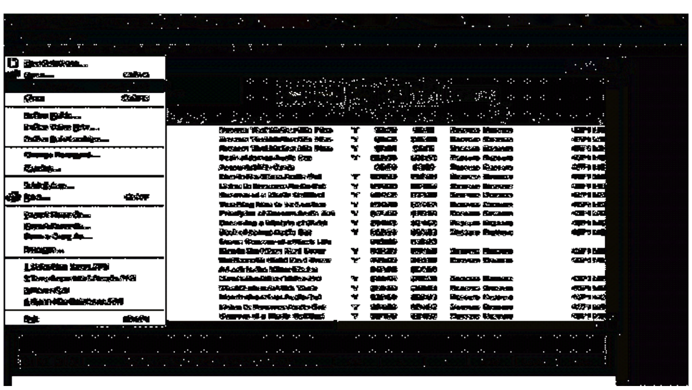


To import details of resources orders, go to Open Remote and click on Sales Line Items

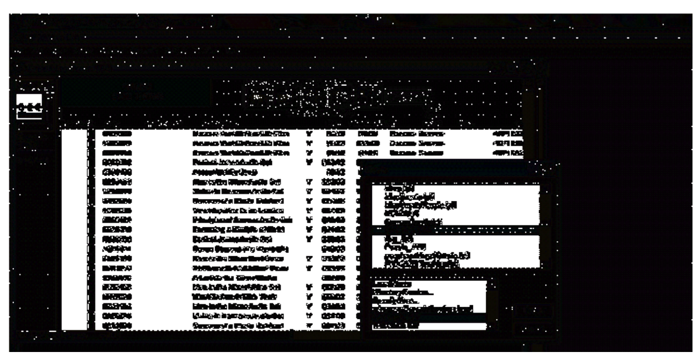
Click on Scripts and in the drop down click on Virtuemart Details Import.



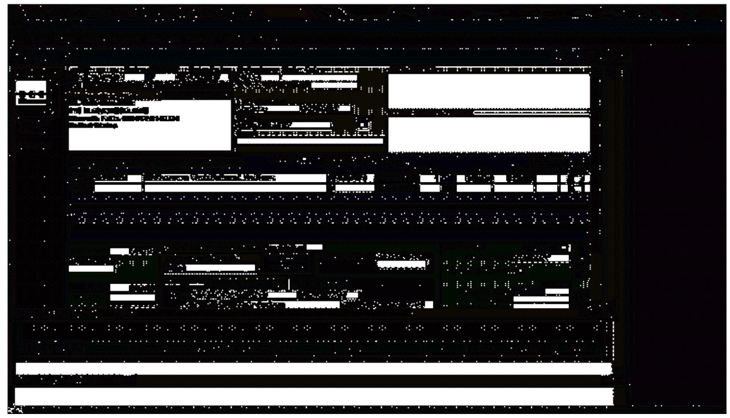
Open Remote to go to the Order Screen



GO to the orders database and then the Order processing layout.

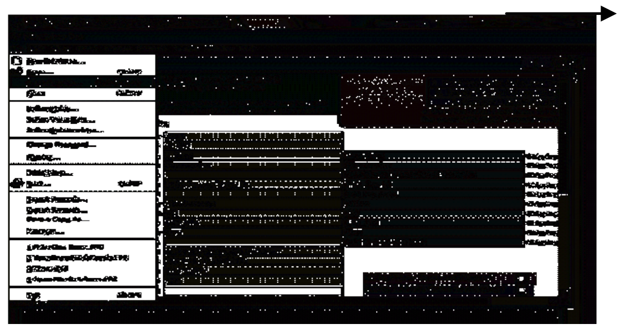


This brings you to your final screen for Resources. You should see all your imported orders with the correct line items for each order.

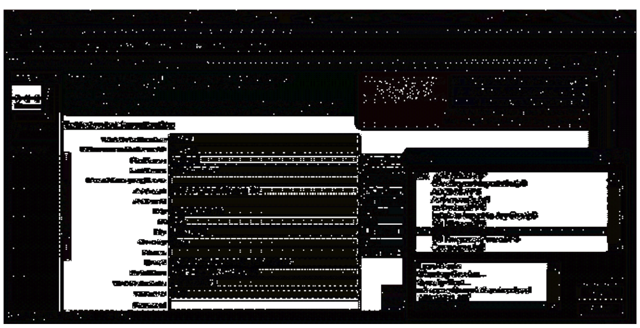


The next step is to import order details for Books!

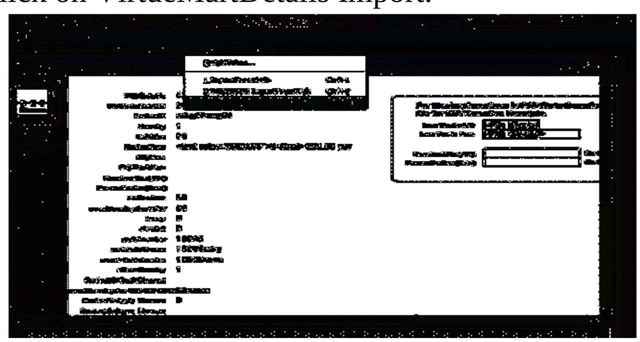
From the TempImportWebPeople screen open remote



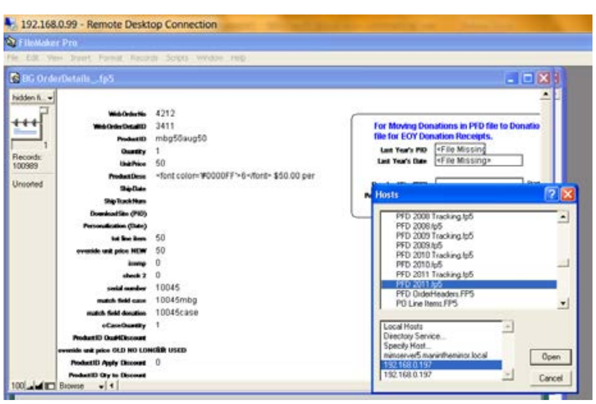
Click on BG OrderDetails.

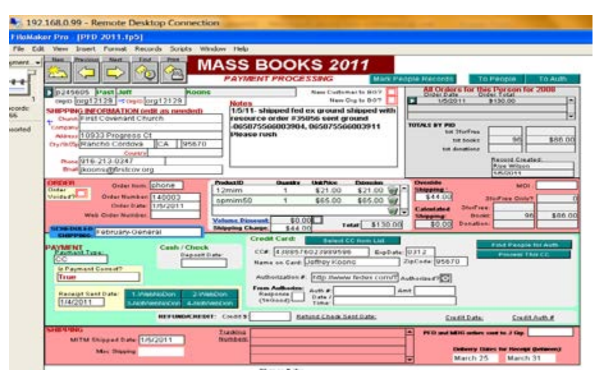


Click on Scripts and then in the Dropdown click on VirtueMartDetails Import.



From there, use the Window menu to return to the PFD current year & payment processing screen





6. Dedup records – Some of the imported people will already be in the database. Find the group of people associated with these orders, go to the dedup section. Use the automated tools to merge duplicate records, then go through one by one and take care of any that need human intervention.

Save order onto Excel spreadsheet, then import it back to FM.

What is used that is not in FileMaker?
Orders come from VirtueMart then to Excel then to FM.

Time Required: 15-60 minutes a day for *all* orders (depending on size of orders).

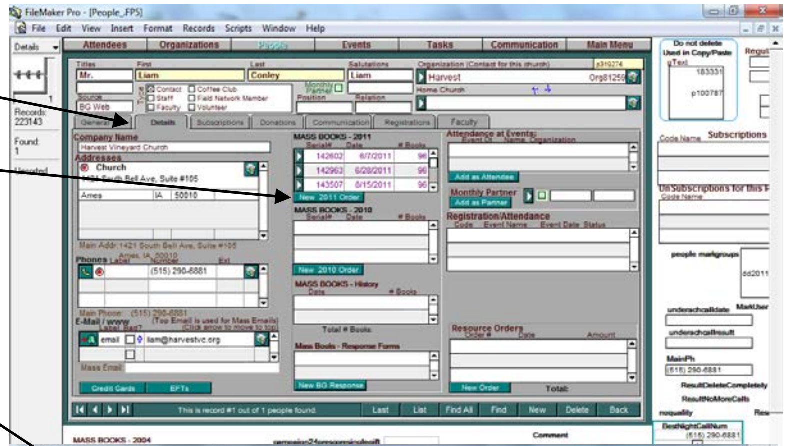
How is this used outside of FileMaker?
Books by the Box orders are exported and sent to the fulfillment house. Other resource orders are processed and shipped internally with a printed shipping order.

Problems / suggestions: It would help if the system could automatically check for existing or duplicated customers (de-duping). Order date populates date receipt sent field

Other opportunities for use:

TASK: Create a Books by the Box order via the telephone/Manual

In People Details tab, then under Mass Books -2011 click on the New order tab

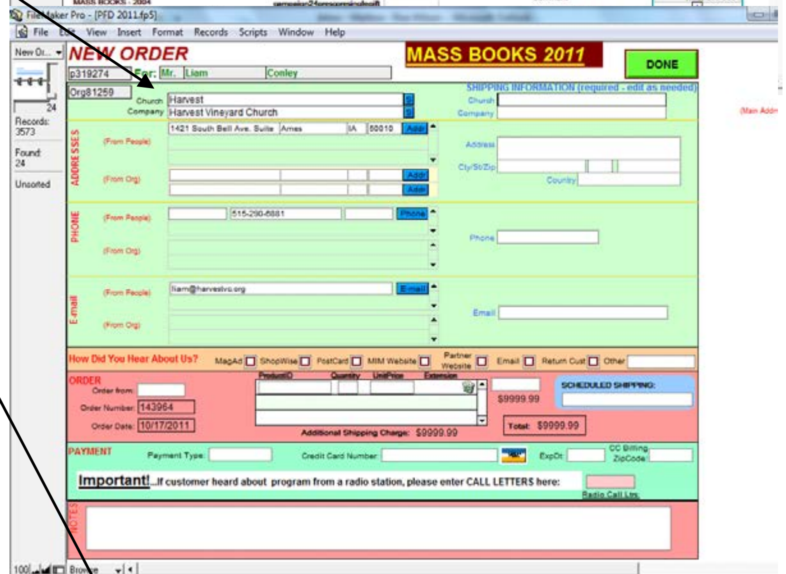


New order Screen

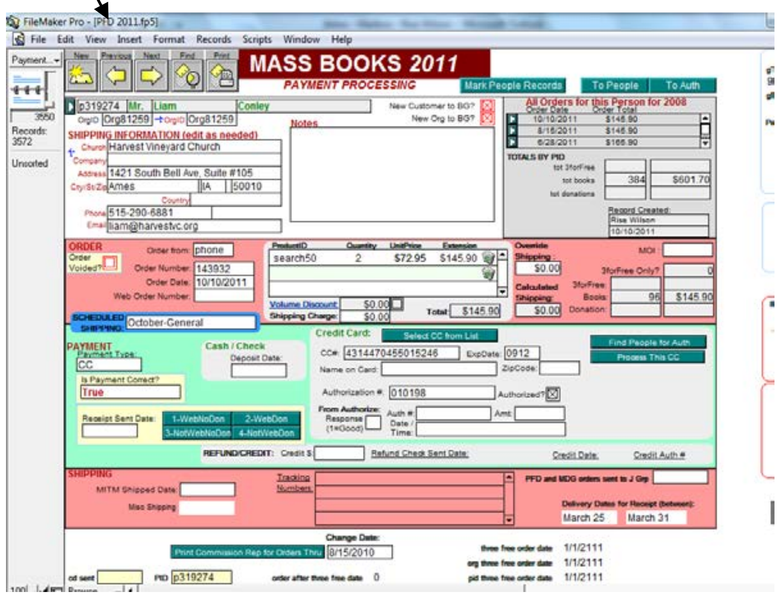
If appropriate, move all of the information from the left into the Shipping information on the right by clicking on the blue buttons to the right of each field.

Fill in the order information in the blank fields under "How did you Hear about Us…and "Order".

Make any notes needed.



The actual Order Screen is used for many things. Do finds by dates, names, product, shipping, zip code and run the credit cards.



What is used that is not in FileMaker?

Time Required: Varies depending what you are looking for. It could take a minute or 30 minutes.

How is this used outside of FileMaker?

90% of the time it is used within Filemaker to find data. Sometimes that data may be exported into an excel spreadsheet

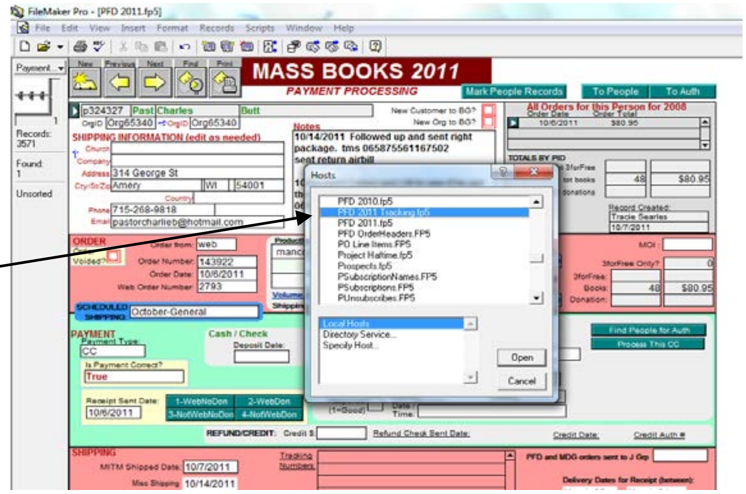
Problems / suggestions: The more complicated the look up the longer it takes. The more records the longer it takes.

Other opportunities for use:

TASK: Tracking Books By Box Orders

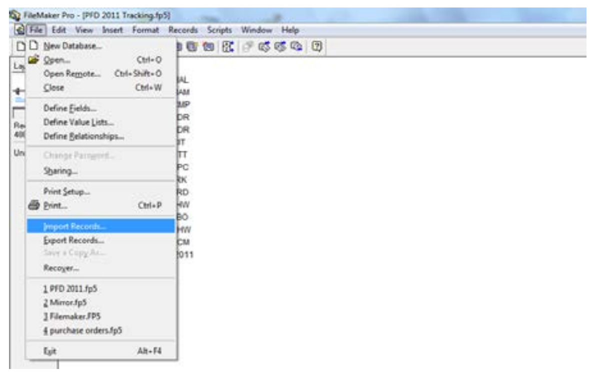
We Import tracking numbers into a filemaker database from a spreadsheet. This helps us get the information from the fulfillment house back into our order system so we can send emails to customers.

Select PFD Tracking database where the information will be stored.

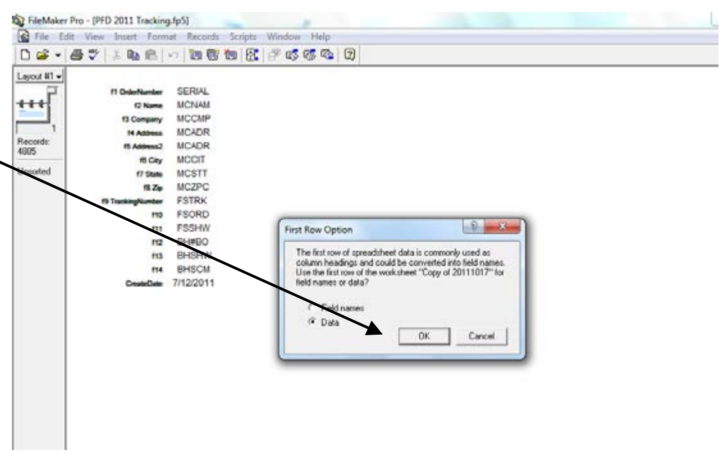


This is the next sheet that pops up. Click on File then import records.

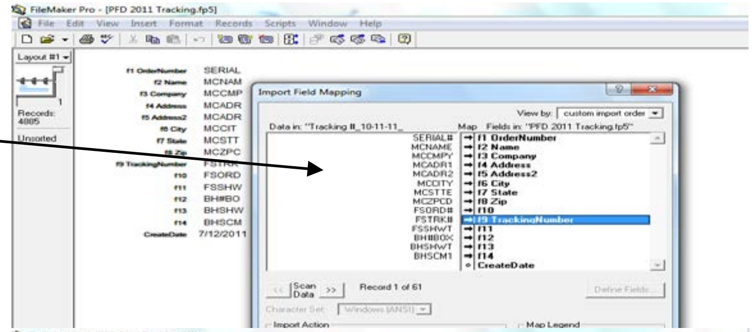
Click Import Records



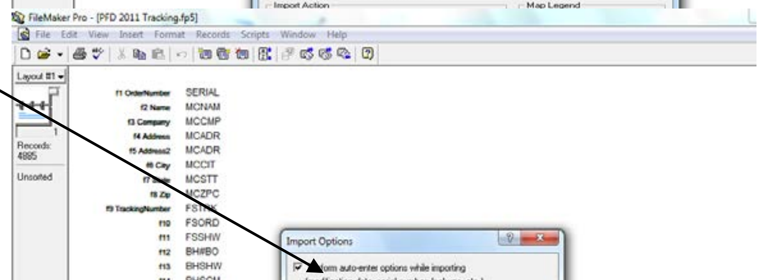
Make sure to note the first row contains data- Click ok



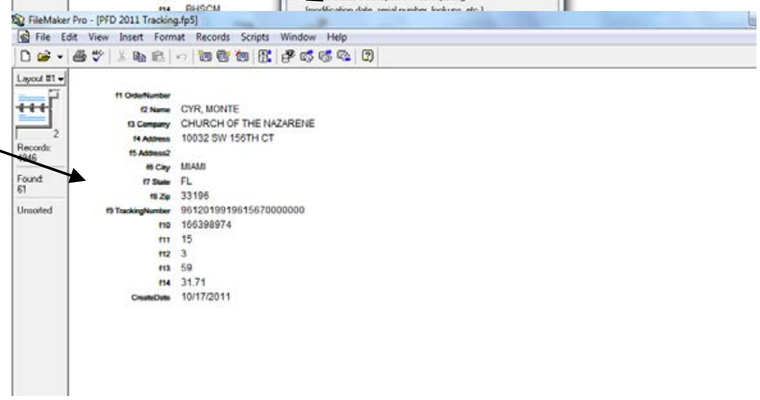
Make sure fields are mapped correctly between the spreadsheet of data from the fulfillment house and the database



Click on Perform Auto-Enter.



The tracking number data is now in the database. It is matched because the serial number of the order in our database comes back as the order number from the fulfillment house.

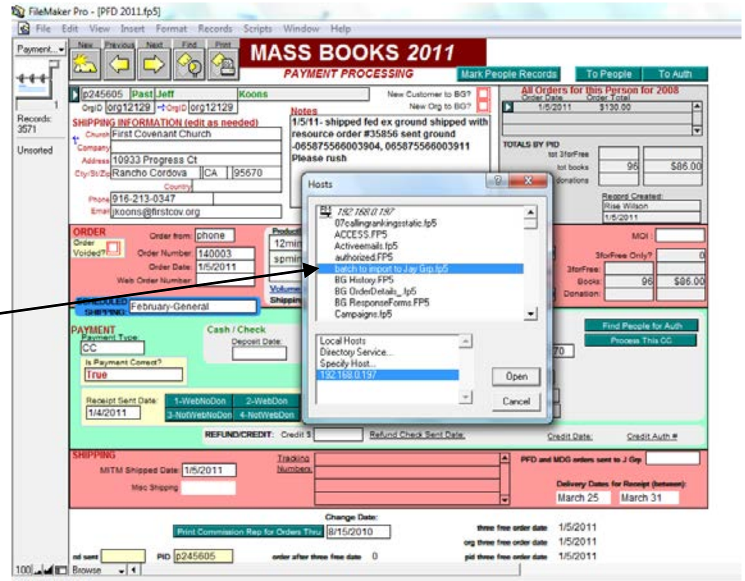


What is used that is not in FileMaker?
Time Required: 30-60 Minutes
How is this used outside of FileMaker?
Problems / suggestions: It is time consuming.
Other opportunities for use:

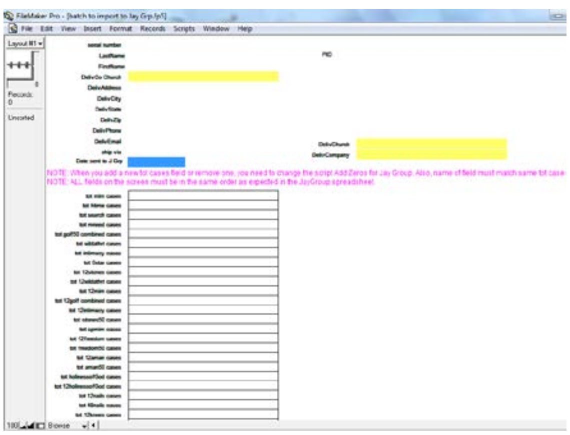
TASK: Batch Import to Jay Group

This is how we send the Books by the Box orders and addresses to our fulfillment house. The result is a csv file with order header information and the number of cases of each type of book. (see attached file.)

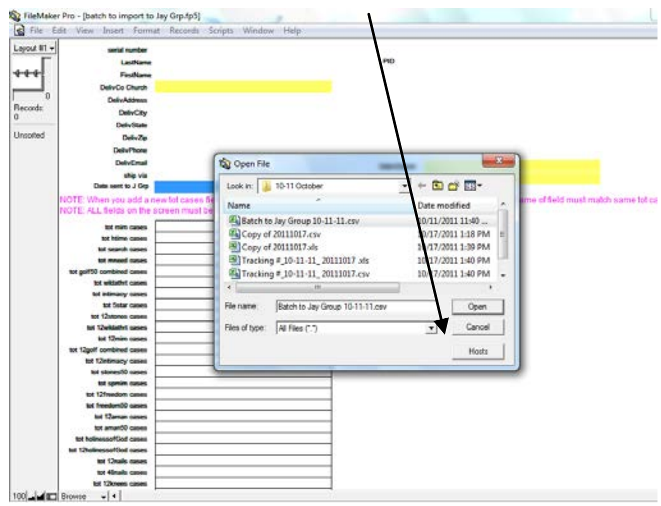
Screen #1- Find the list that you would like to export click on File Drop down list “batch to import to Jay Group”



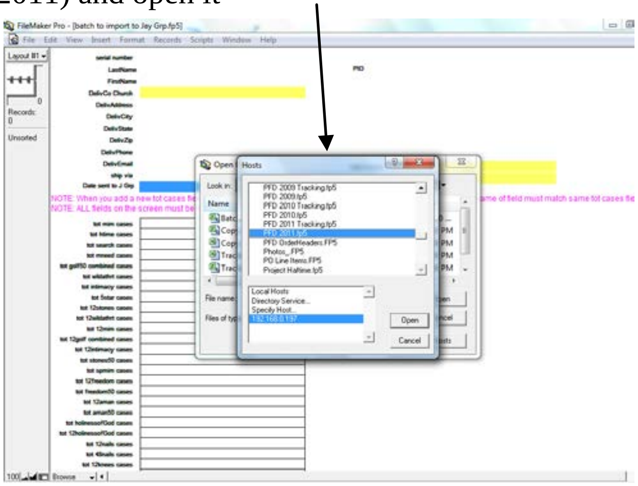
The Batch Import to Jay Group database comes up. Go to the file drop down and select “import records”



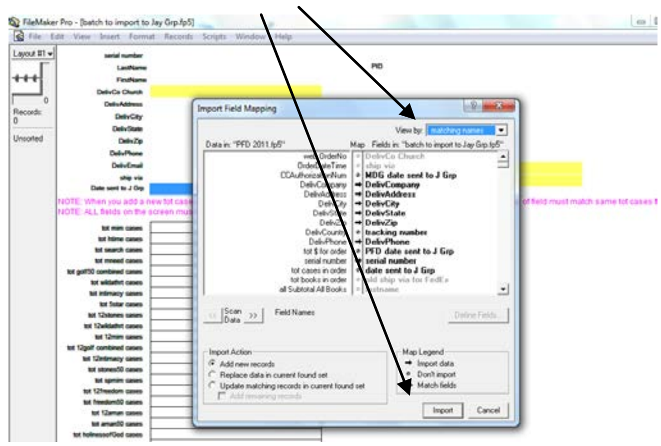
Name the file you are exporting, then click on the “Hosts Button “ Bottom right



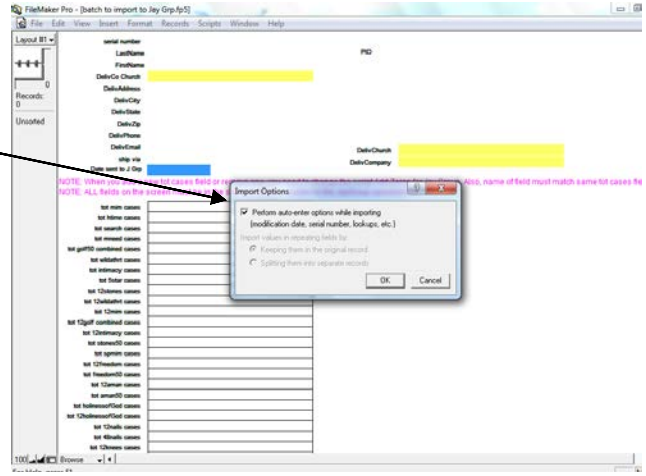
Find the data base that you are working in (PFD 2011) and open it



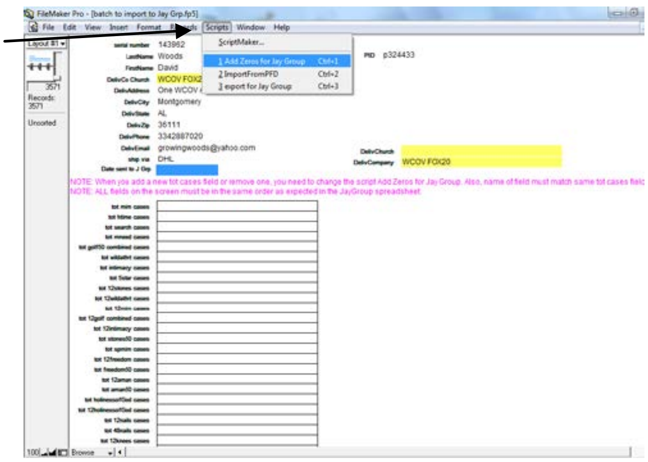
In the View By box select Matching Names then click import



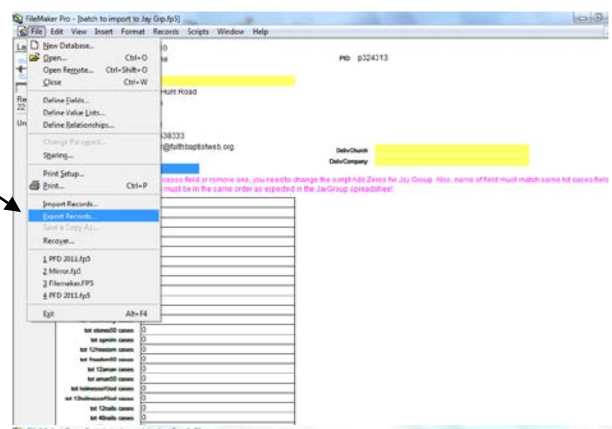
Check the Perform Auto-enter…



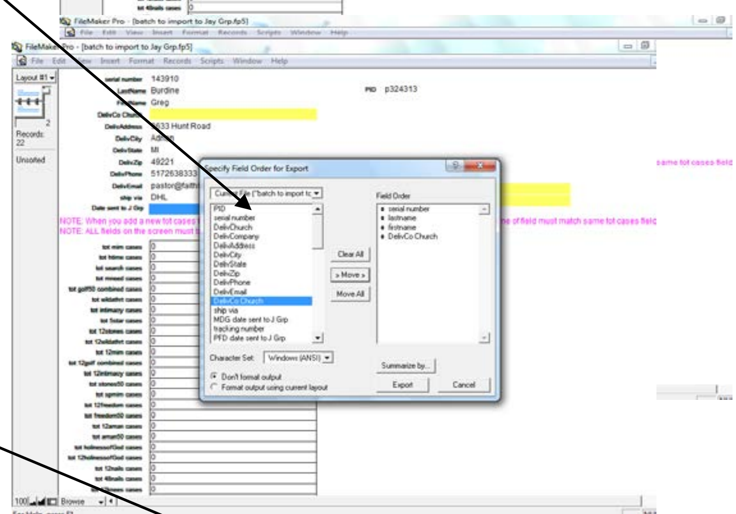
Select scripts and click on add Zeros for Jay Group. This makes sure there is data in every cell of the spreadsheet rather than blanks.



Go to File Drop Down and Export Records.



Export Records to File and name the Export File.



Select the Fields that need to go on your spread sheet. In the correct order. Click export.

You have now created the spread sheet and can do with it whatever you would like.

What is used that is not in FileMaker?

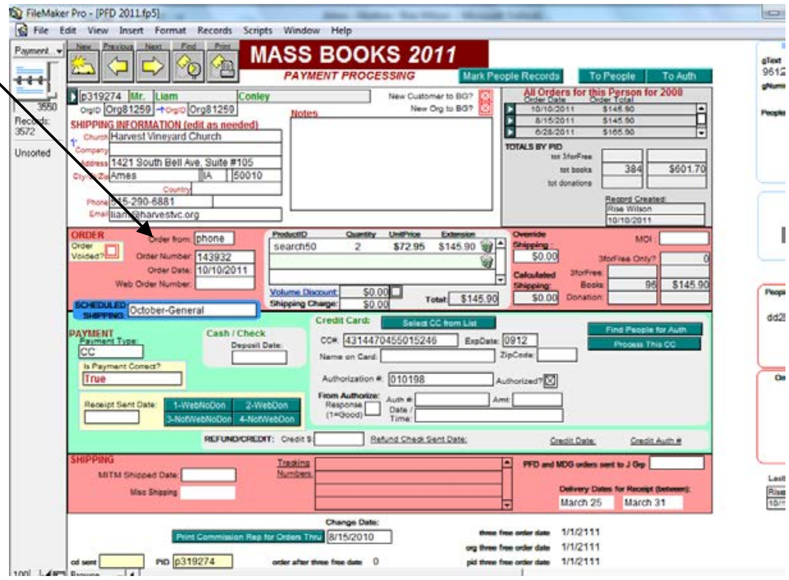
Time Required: 30 minutes
How is this used outside of FileMaker? This is all exported to an excel spreadsheet

Problems / suggestions: Miss one step and you may have to start over. Filemaker has a hiccup and you need to start over.

Other opportunities for use:

TASK: Order Screen for BOOKS

Order Screen is used for many things. This is where new orders are entered if they come by phone or mail.

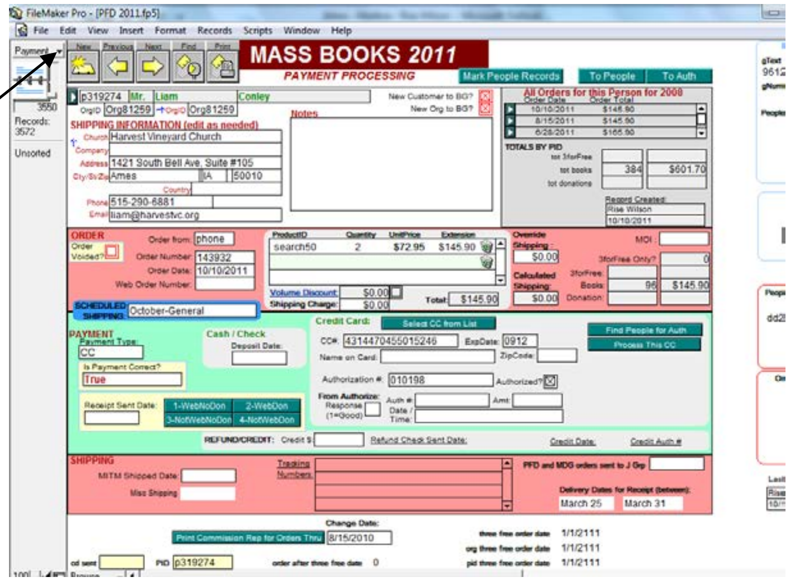


Orders that are loaded by csv file after downloading from ecommerce are viewed here as well. Also used to do finds by: dates, names, product, shipping, zip code. etc.

This is also the base screen for generating the file that we send to the fulfillment house.

TASK: Mass Books Totals

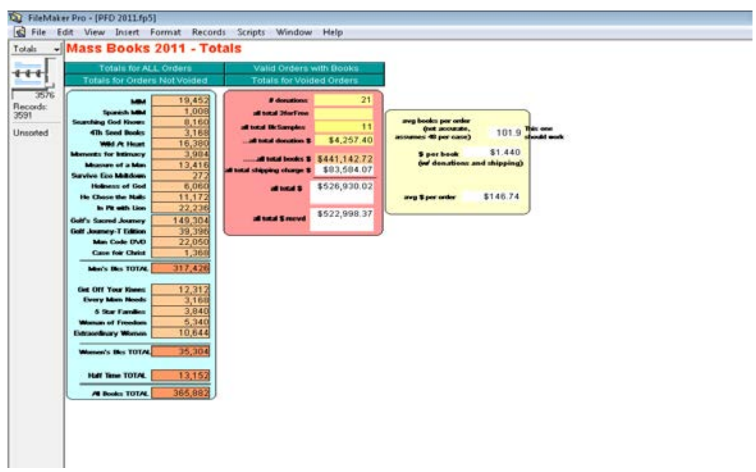
This screen is very important, if you are looking for aggregate values of products and $ figures from finds done in the Books by the Box program.



From the Mass Books (Books by the Box) Screen click on the layout Tab (Payment) below the tool bar, but above the rolodex on the left side of the screen.

A Drop down will appear… click on Totals

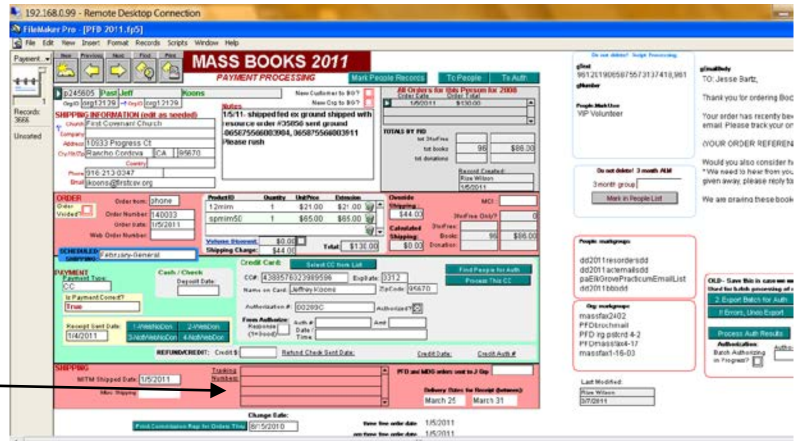
Totals by type of book are calculated



Issues: It may take seconds or possibly 15 minutes to populate based on the number of records in the found set.

Suggestions: It would be great to have a breakdown of products by cases offered. For example: cases of MIM Split between 12's and 48's

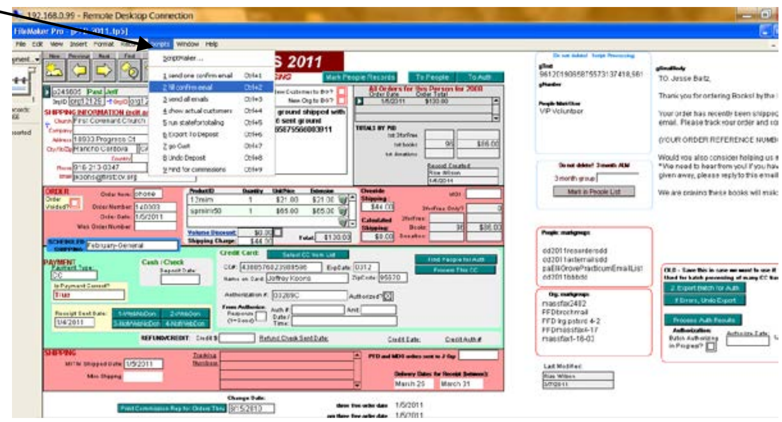
TASK:Sending Confirmation E-Mails from Filemaker



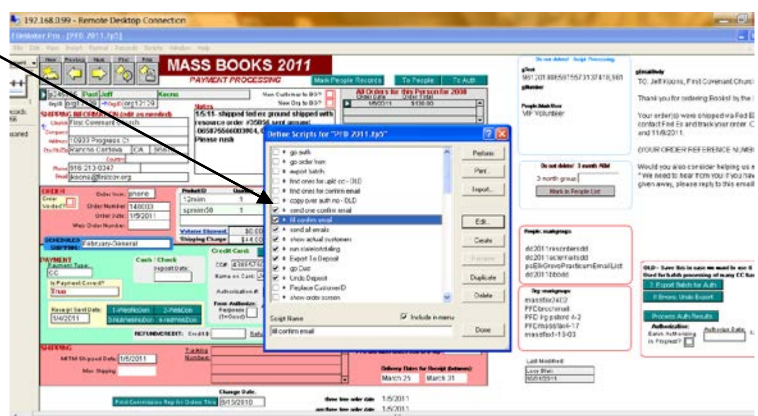
This is used to send tracking numbers to the people who have ordered books.

After tracking numbers are imported into the Mass Books Processing Screen we send an e-mail to let them know what their tracking numbers are.

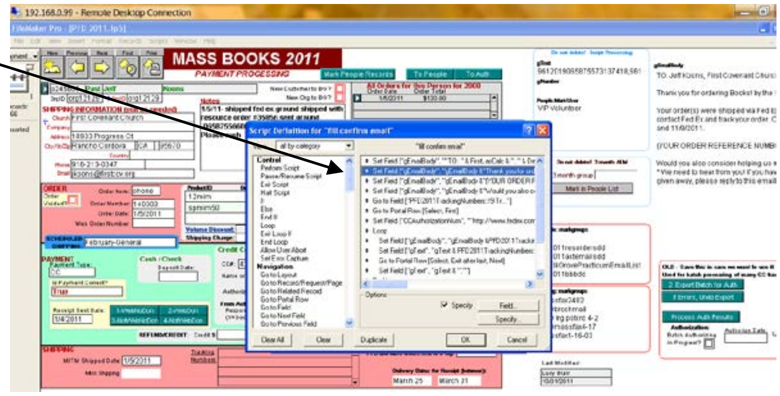
1. Go to Mass Books Payment Processing Screen. Find all of the orders that have tracking numbers imported.
2. Click on Script Maker



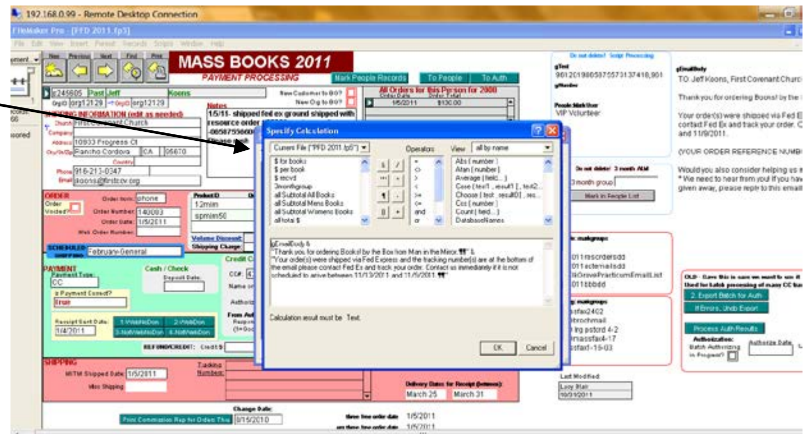
3. Click Fill Confirm Email



4. Click on the Set Field for gemailbody so that you can change the text of the email. Click on the specify button to change the text…



5. A Specify box will appear. Change the text. Click ok and then done.



Database Items needed for the Fuel and Area Directors - Al

1. Fuel
    a. Ability to note who has registered and payments possibly even processing CC's through the database
    b. Ability to track hotel records and payments
    c. Ability to take notes on registrants (including but restricted to follow up notes from Summit (example (call Steve about booking a Seminar, sent autographed book to Steve, etc.)
    d. Ability to produce a Task list and /or Timeline for Fuel event (Excel example attached)
    e. Ability to track historical attendance of previous Fuel Summits and all other MIM events
    f. Ability to note Organizational Sponsors and their sponsorship fees paid
    g. Ability to track sponsors historically
    h. Communication template options – Email, thank you notes, postcards, letters for reminders or follow up with Fuel attendees
    i. Alerts system for task/timeline reminders
2. Area Directors
    a. Ability to identify and contribute to an area director (AD) by account number
    b. Ability to assign an area director to a coach and/or regional director, VP, etc.
    c. Ability for AD to record daily progress on raising/maintaining funds and to access the database
    d. Daily account updates per AD and alerts to changes in donations
    e. Weekly/Monthly/YTD reports for AD and Coach/mentor on their account – deposits and withdrawals; balance
    f. Ability for Coach and others up the chain to review AD financial and contact accounts
    g. Ability for AD to enter Contact (name/ph/address/email) – the number of contacts will be at least 200 and as high as 2000-3000.
    h. Ability for a donor to access via account number so they can see that their online gift is going to Lucy Blair, AD for Orlando
    i. Contact data base management with a possible rating system of contact (Ex: 1-Monthly partner, 2-Likely to give, 9- least likely to give, 10 – Declined giving
        i. Future contacts (people they will want to contact, just not yet)
        ii. Most likely to give
        iii. Least likely to give
        iv. Current partners and commitment values (monthly)
        v. Current partners and special gifts
        vi. Partners that gave special gift for follow up to convert to monthly
        vii. Prospects that asked to be contacted at a later date for giving (ex: had unexpected bills so call me in 6 months – things might be different then)
        viii. Call back for appointment
        ix. Call back for decision
        x. Send thank you note
        xi. Non-investors (not giving but wants prayer letter)

   xii. Templates for thank you note, prayer letter, Ministry Partner Development (MPD) letters (fundraising)response cards, scripts, labels & donation receipts – needs to have standard default text with ability to personalize
   xiii. Alert system to remind AD to follow up, write thank you notes, return phone calls, etc.
   xiv. Like Monthly Partner database needs Notes area with date and time, contact report area to identify outcomes of phone calls or emails.
   xv. Task/timeline system to establish fundraising goal, progress, etc.
  j. Receipts
   i. Ability to customize receipts by "project" (Ex: Donation receipt for Alpharetta Coalition (area director); donation receipt for Roswell Coalition (area director)

3. Territories and Commissions
   a. Ability to assign territories by state, by city and by groups of churches to (1) HQ and (2) an Area Director.
   b. Ability to roll up territories for a Regional Coach or Director.
   c. Ability to mark products sold so that commissions can be awarded and marked "paid" every pay period.
   d. Ability to provide sales reports for HQ and for an Area Director at the line item product level (ex: registration for an event, box of books sold, etc.) and total sales values by LTC events (No Man Left Behind Conference training, NMLB Essentials Training, NMLB Practicum Training); NMLB Courseware sales; Books by the Box; Seminars (YTI); Seminars (FLS); Resource Sales.
   e. Ability to add new products to the above.
   f. Ability to assign a commission value to each product/category.
   g. Ability to split commissions (ex: 40% awarded to HQ; 60% awarded to an Area Director).

Additional

- Import 40+ Excel spreadsheets from interim use. Migrate, for each Area Director, their list of contacts and related info including gifts provided via cash, check or online giving to the data base.

- Initial ("the basics") raining for new Area Directors on data base management. Remedial/refresher training available on line.

- Tier I Customer Service support for all time zones.

General Database Suggestions

- Filemaker is not easy to navigate

- It'd be helpful to have an automatic formatting applied to People data – can't emphasize this enough.

- It'd be helpful to have a default Salutation, if left blank, that would simply copy the First Name. Otherwise, emails read as "Dear ," as well as other mailings.

- It’d be helpful to have some automatic (one button) actions that take place if someone is marked as Deceased, such as removing the Mailing Address/Email to an archive spot, selecting Do Not Call, etc.

- It’d be helpful to have an automated response happen once “Do Not Mail” or “Do Not Fax” was selected under the Org, such as the fax number going to another field or something so we don’t have to always omit these records when pulling marketing lists.

- It would be helpful for the database to archive old records and data.

- Filemaker seems to randomly remove checks (✓s) from boxes like PC or Board of Driectors for no reason.