



Using FileMaker Pro with Microsoft® Office



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Introduction



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

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

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



THINGS YOU CAN DO FASTER AND EASIER IN FILEMAKER PRO

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

Before You Get Started

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



www.filemakertrial.com landing page



Let's Get Started!

Sharing Data between FileMaker Pro and Microsoft Excel

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

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

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

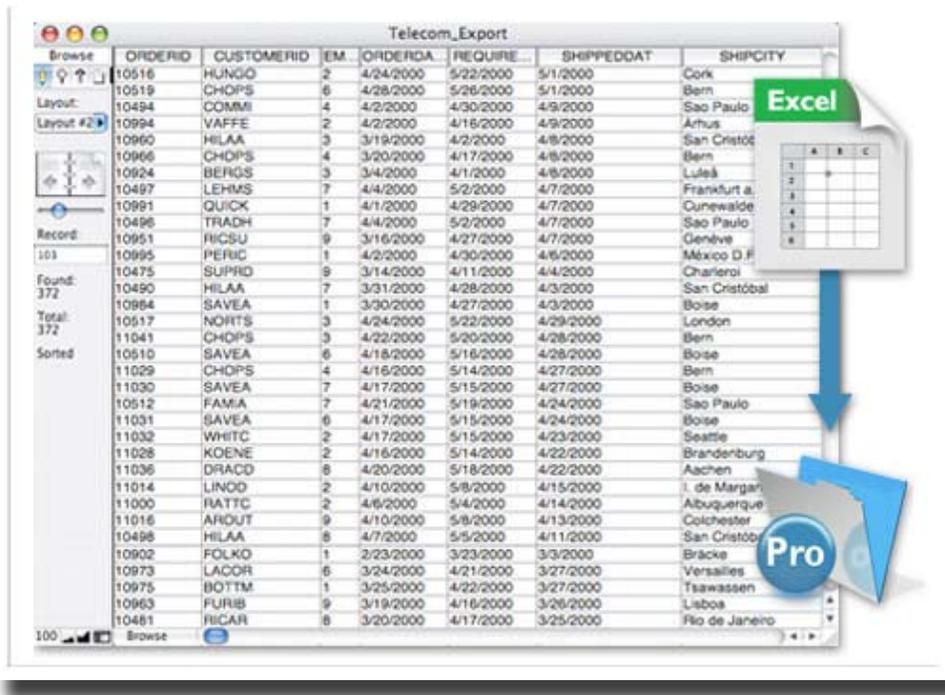
With FileMaker Pro, you can instantly transform your Excel spreadsheets into richer, more powerful database solutions that let you perform searches, sort data, import images, create reports, add links, resize columns, and more - by simply dragging and dropping your Excel spreadsheets into FileMaker Pro.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

EXERCISE 1: DRAG AND DROP IMPORT

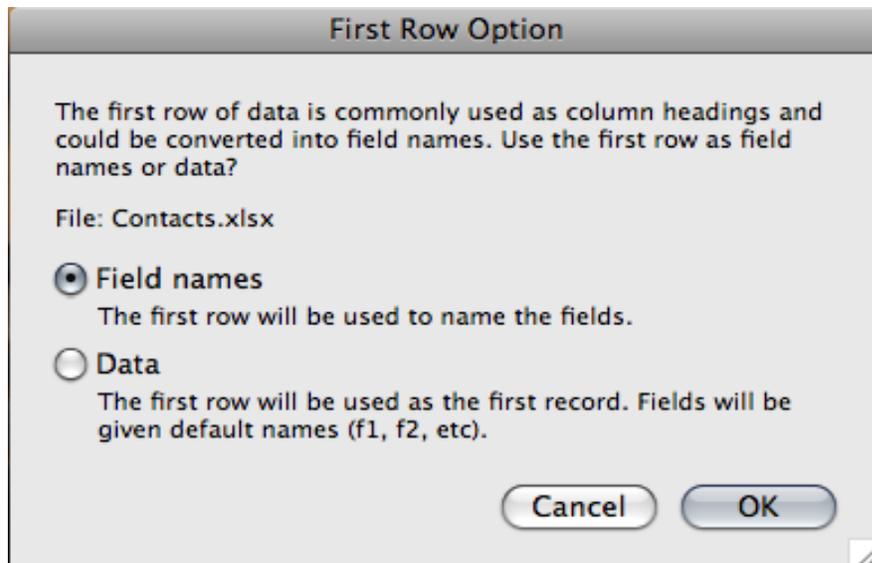
There's no need to re-enter the information you have stored in Excel or any other spreadsheet. You can easily import your information following these simple steps.



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



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



3. In the Create a New File Named dialog box, type a name for the new file, choose a location, then click ok.

Name_First	Name_Last	Title	Company	Street1	City1	State_Pro.	Phone1	Email	Postal_Code
Jim	Bageant	Sales Associate	Acme, Inc.	4213 Navajo Drive	Westminster	MD	408-321-6342	bageant@adelphia.	21157
David	Baker	Sales Associate	Acme, Inc.	162 Commercial Ave.	Paw Paw	MI	408-321-6342	prep@trendnet.net	49079
Bill	Bargagliotti	Engineer	Acme, Inc.	7423 Wood Rail Cv	Memphis	TN	408-321-6342	billbarg@midssouth.r.	38119
Bingo	Barnes	Engineer	Acme, Inc.	109 S. 4th St.	Boise	ID	408-321-6342	bingo@boiseweekly.	83702
David	Barosky	Engineer	Acme, Inc.	17 Green Hill Rd.	Exeter	NH	408-321-6342	barosky@attbi.com	3833
Jim	Bartley	Engineer	Acme, Inc.	833 SW 11th Ave	Portland	OR	408-321-6342	jmbartley@integrty.	97205
Daryl	Beeson	Engineer	Acme, Inc.	753 S. Walnut Street	Boise	ID	408-321-6342	dbeeson@loerstel.	83712
Peter	Bensen	Sales Associate	Acme, Inc.	141 Cascade Street	Lolo	MT	408-321-6342	pbensen@surfbest.	59847
William	Bergmann	Sales Associate	Acme, Inc.	1050 South Outer Road	Blue Springs	MO	408-321-6342	WCON13@aol.com	64015
Emory	Bolton Jr	Accounting	Acme, Inc.	5071 E. Woodmill Drive	Wilmington	DE	408-321-6342	emoryb@comcast.net	19808-4082
William	Bombardier	Sales Associate	Acme, Inc.	NULL	Brooklyn Park	MN	408-321-6342	wjbomb@earthlink.	55445
Bryan	Bowser	Engineer	Acme, Inc.	700 SW Harrison Suite 1200	Topeka	KS	408-321-6342	bbowser@hansasco	66603
Laura	Bowyer	Engineer	Acme, Inc.	PO Box 2631	Woodinville	WA	408-321-6342	laura@solutionmaker	98072
Wayne	Boyd	Engineer	Acme, Inc.	PO Box 179	Littleton	CO	408-321-6342	wayne.l.boyd@imco.	80120
Harold	Bradford	Engineer	Acme, Inc.	2439 E. Washington St	Charleston	WV	408-321-6342	hbradon1@yahoo	25311
Larry	Brady	Engineer	Acme, Inc.	P.O. Box 5252	Madison	WI	408-321-6342	lbrady@its.com	53705
Jaymee	Brandt	Engineer	Acme, Inc.	1140 Cherokee St. #504	Denver	CO	408-321-6342	jaymee7@earthlink.	80204-3683
Don	Breslauer	Engineer	Acme, Inc.	71 Farmingdale Drive	Parsippany	NJ	408-321-6342	dbreslauer@mac.com	7054
Ed	Brown	Sales Associate	Acme, Inc.	5326 Wye Creek Dr	Frederick	MD	408-321-6342	edward.	21703
James	Canaday	Engineer	Acme, Inc.	266 Pitts Bayshore Drive	Freeport	FL	408-321-6342	jc11sh@icct.net	32439
Danielle	Cannata	Sales Associate	Acme, Inc.	29 Everett St.	Cambridge	MA	408-321-6342	dcannata@mail.	2138
Joe	Caravella	Engineer	Acme, Inc.	11621 Hunters Green Court	Reston	VA	408-321-6342	pcr@restonusa.com	20191-3519
Dominic	Carpini	Engineer	Acme, Inc.	809 Donagal Drive West	Folanabee	WV	408-321-6342	dommail@comcast.	26037-1010
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JEFF	CONDIT	Sales Associate	Acme, Inc.	6135 MANCHESTER	ST. LOUIS	MO	408-321-6342	JCONDIT@HERITAG	63139

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

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

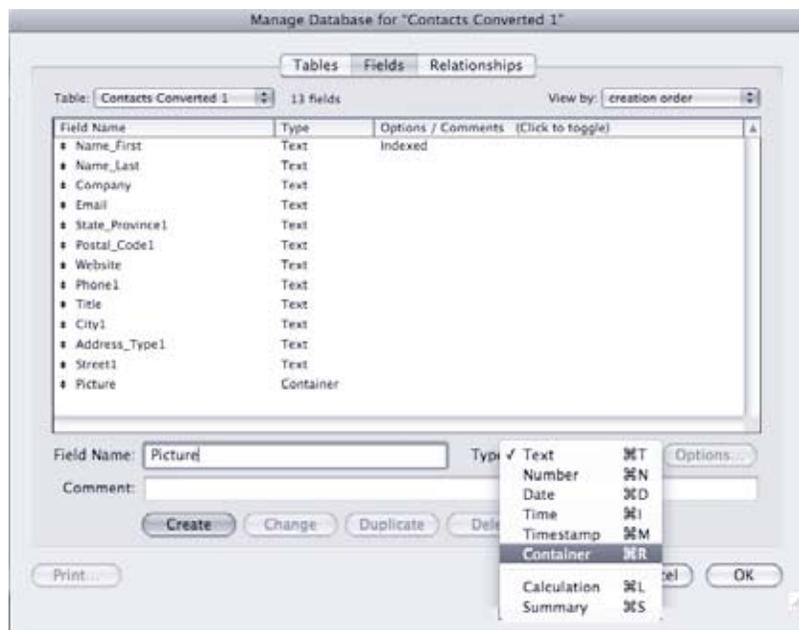
- ▶ Click on any header, and FileMaker Pro will automatically sort the data for you.
- ▶ Find information quickly by clicking on the Find Icon in the bar above, and then search on any category that you wish.
- ▶ Add or delete records instantly using the “New Record” or “Delete Record” icons.
- ▶ Resize or re-order any column by dragging the column header to the left or right

EXERCISE 2: VIEWING YOUR DATA WITH DIFFERENT TYPES OF LAYOUTS

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



1. Select the Edit Layout button on the Status Toolbar
2. Drag and drop any of the field names or field value boxes that you see to a new location on the form.
3. Double-click to change the field name or field type choosing from a variety of options presented on the Field/Control Setup screen. After experimenting with a few options, Click OK.
4. To add a new field to your form, select the Manage button in the Status Toolbar, then choose Database. You will see the Manage Database screen.

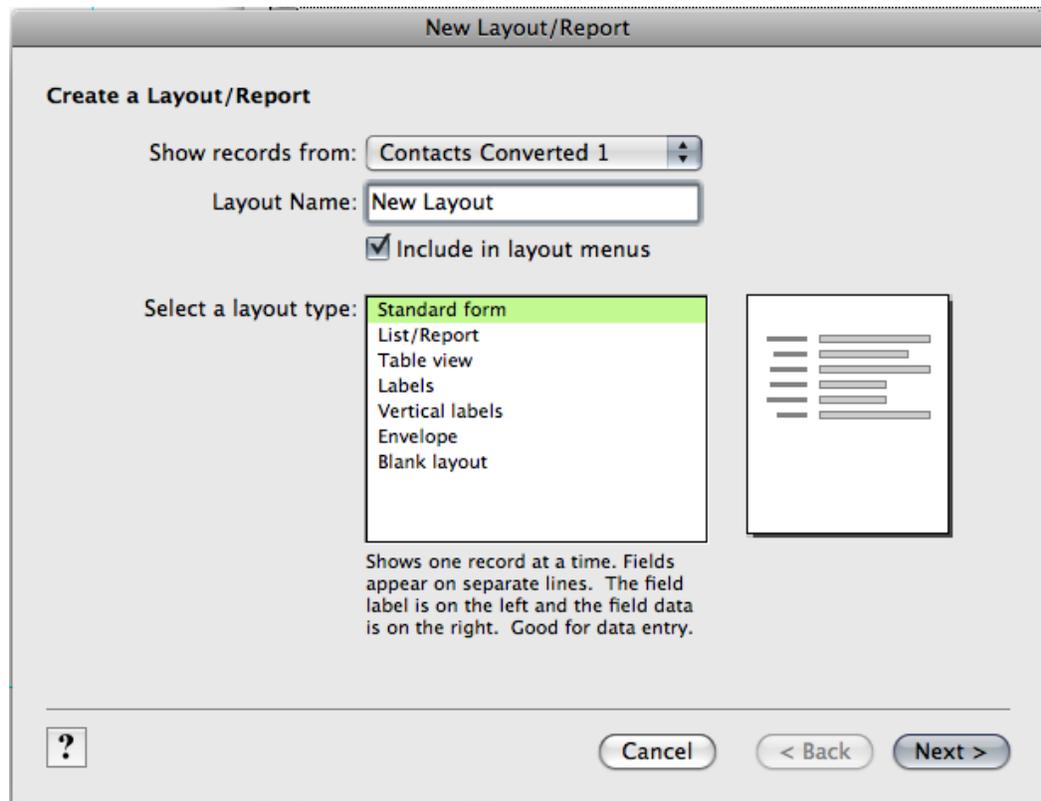


5. Type in a name for any new information you'd like to track in the Field Name box (Picture for example).
6. In the Type box, choose Container from the pop-up list of all the different field types you can store in FileMaker Pro.
7. Click Create, then Click OK.

Now a Picture field has been added to your database's list of available fields, and now all you need to do is drag it to your form wherever you'd like a picture to display.

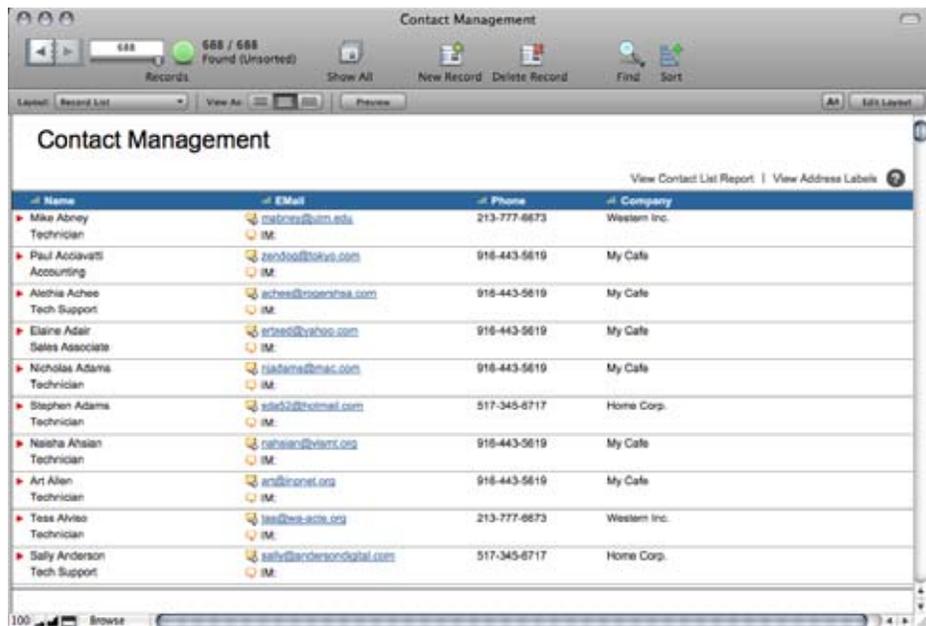


8. Another easy way to create new layouts is with the "Layout/Report" button located in the top portion of the Layout screen.
9. Click on the "New Layout/Report" button



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





Sample layout made from Layout/Report Assistant

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



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



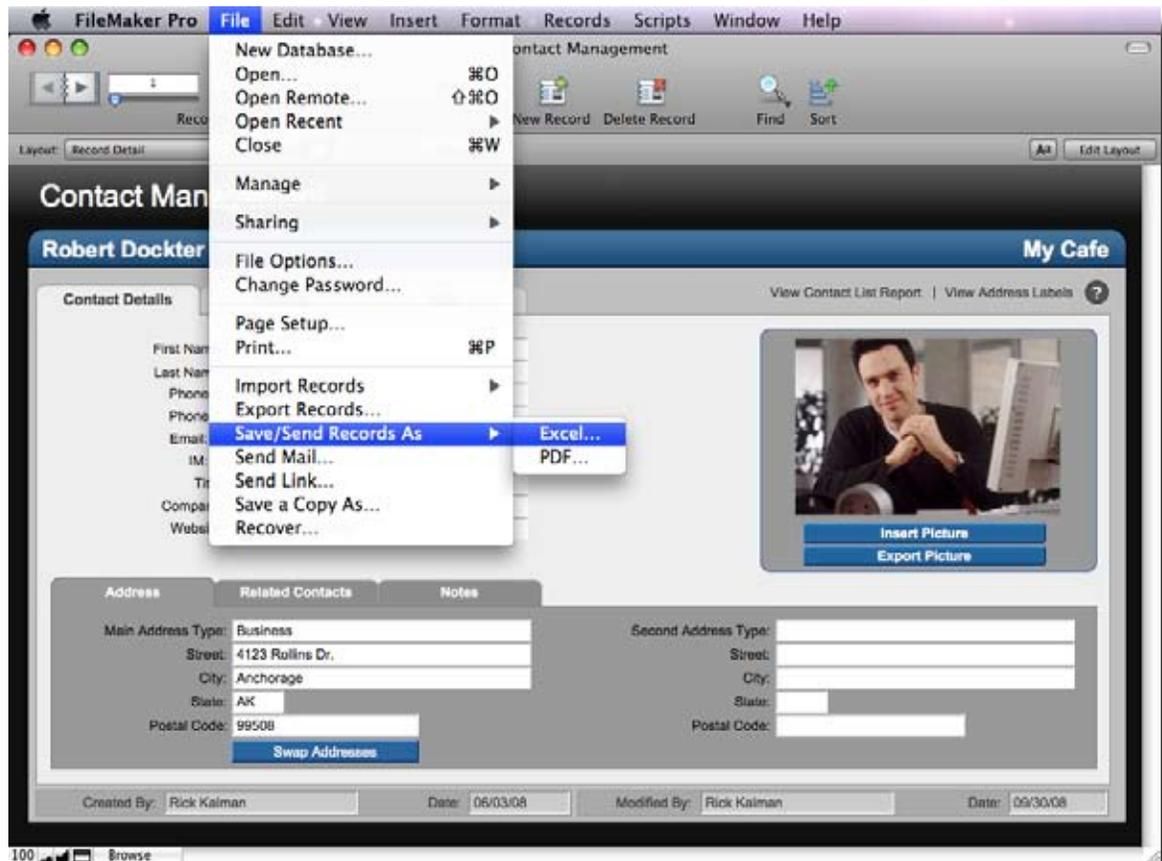
Exercise 3: Send data as an Excel file.

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

Excel Maker

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

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



Save FileMaker data directly into an Excel file

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



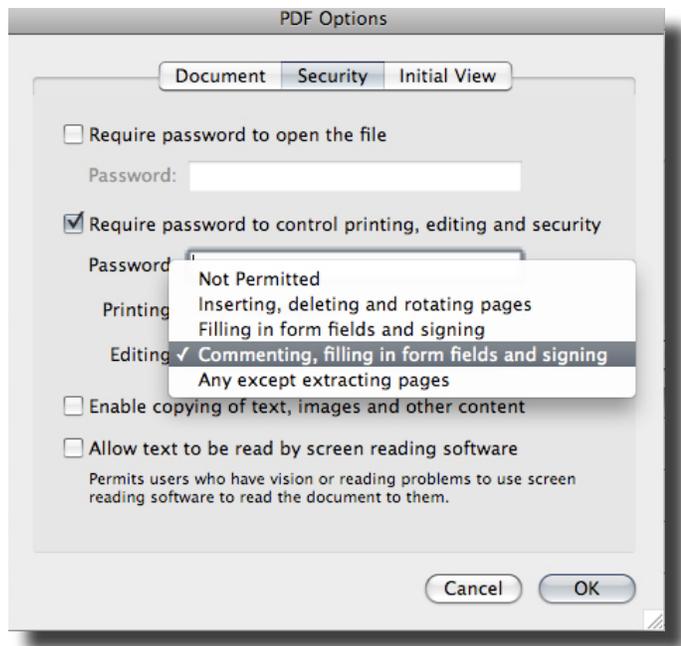
3. After saving, you can automatically open the file in Excel, and/or create an email with the file as an attachment, or both. Just select the appropriate options at the bottom of the Save As dialog box.
4. Excellent! Your FileMaker Pro data is now saved as an Excel file and presented in the familiar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

Exercise 4: Save data as a PDF file.

PDF Maker

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

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



Share FileMaker data through PDF files

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



Sharing Data between FileMaker Pro and Microsoft Word

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

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

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

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

Launch Microsoft Word and open your existing letter template document:

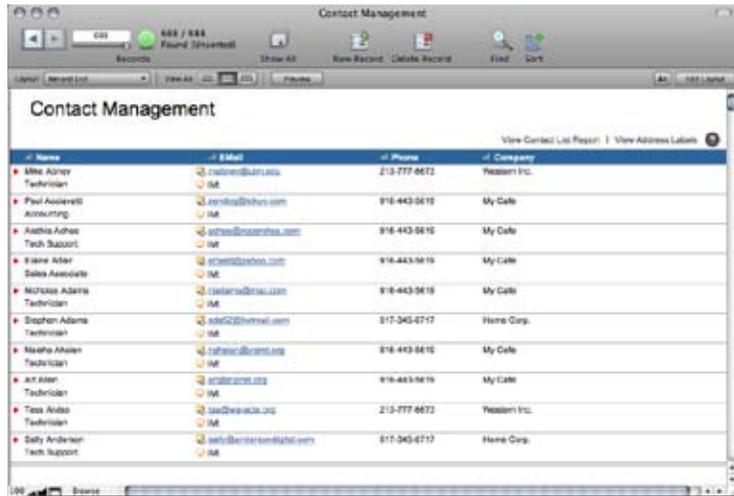


Figure 1: A sample marketing letter written in Word, ready for merge fields to be added



Step 2: Creating the Merge Data File in FileMaker

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



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

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

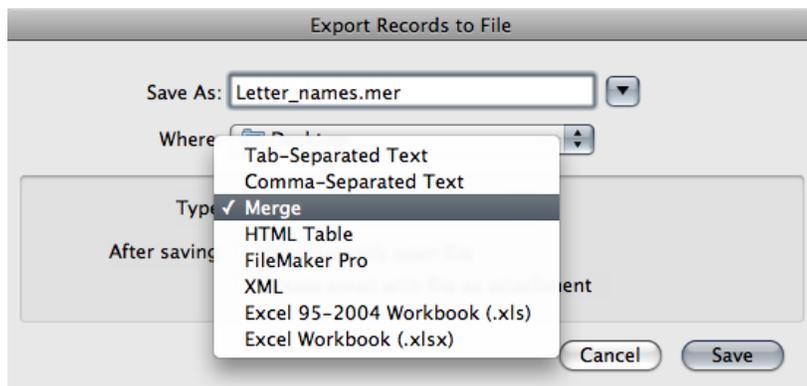


Figure 2: The file options in the Export Records to File dialog box



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

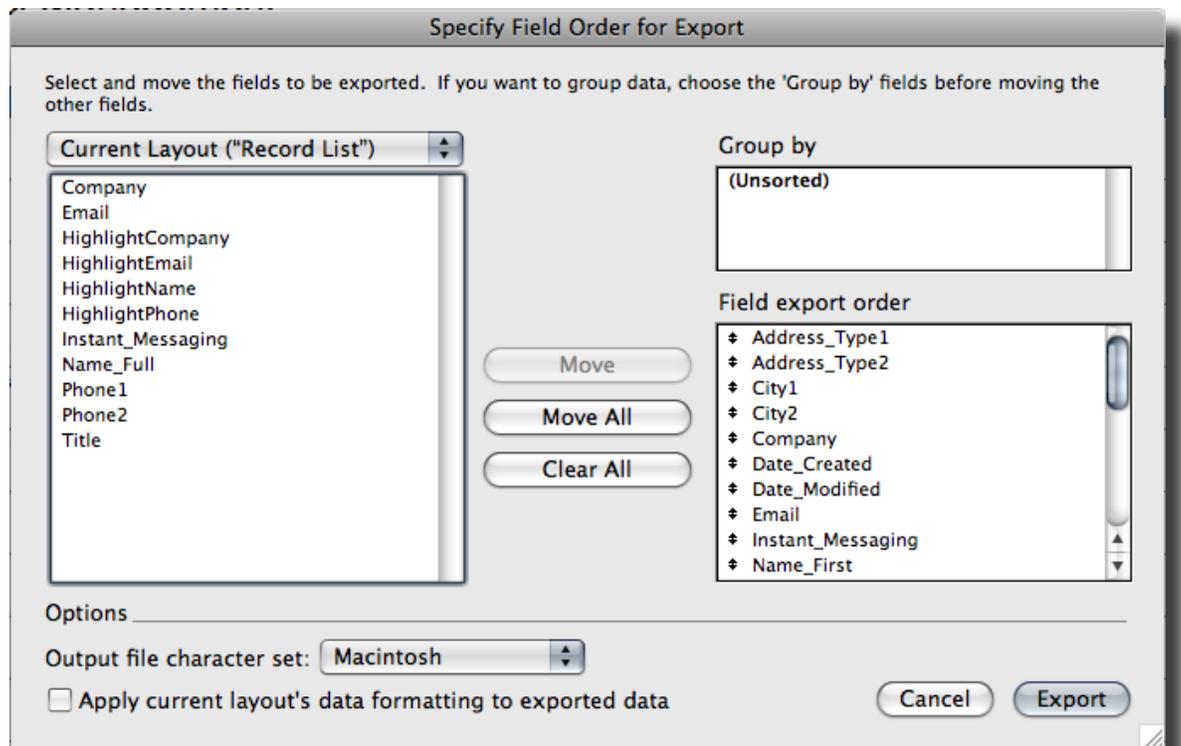


Figure 3: The Specify Field Order for Export dialog box

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

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



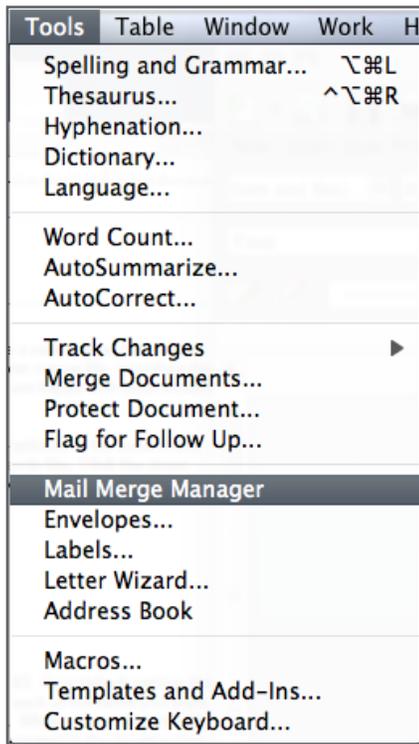


Figure 4: Selecting the Mail Merge Manager feature within Microsoft Word

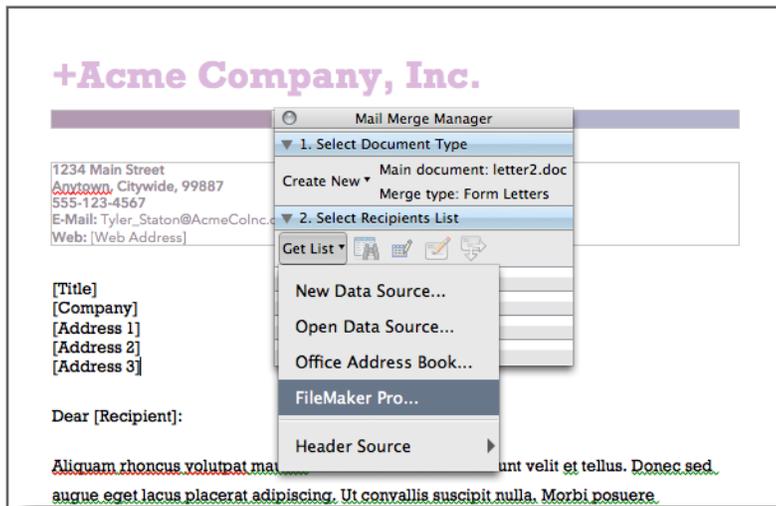


Figure 5: Select either "open data source" and choose your FileMaker Mail Merge document, or in newer versions of Microsoft Word, you can also choose FileMaker and link directly to your FileMaker database.



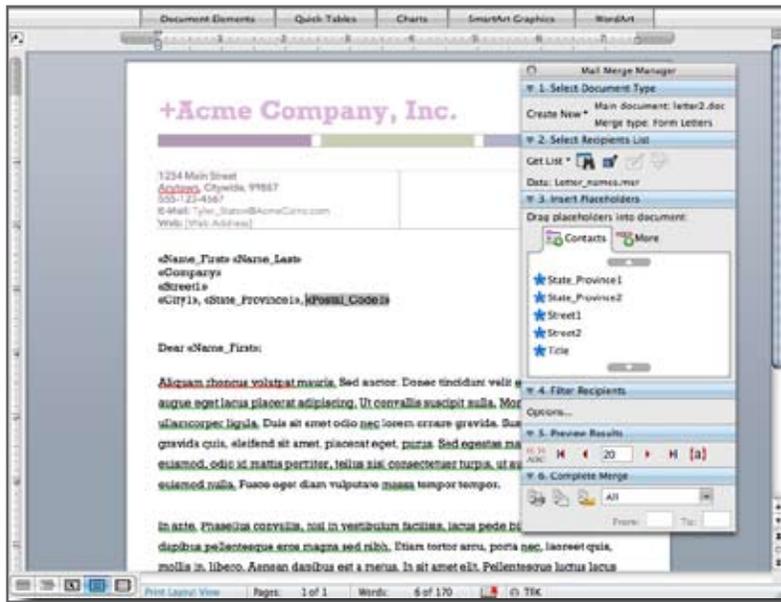


Figure 6: Drag and match your database fields to the address fields in your letter.

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



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



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

Use FileMaker as an Asset Library to Store Office Documents

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

Step 1: Opening the Document Library FileMaker Template

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



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



Step 2: Inserting a File into the Document Library File

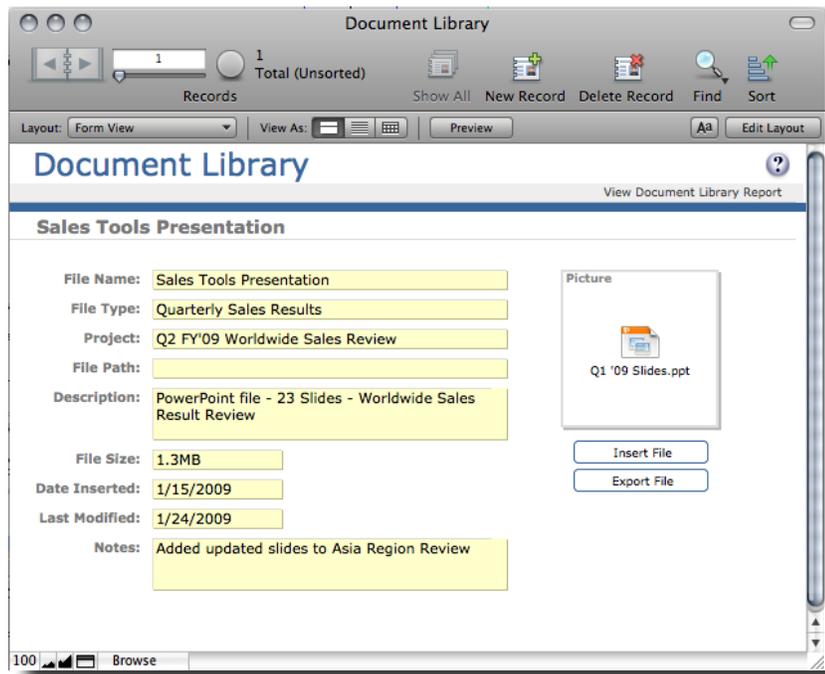


Figure 2: Use the Document Library file to store details on a PowerPoint Presentation

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

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



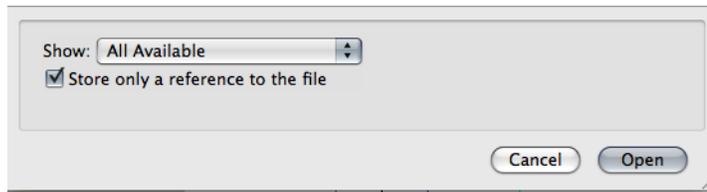


Figure 3: The file storage option within the Insert File dialog box

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

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

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

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

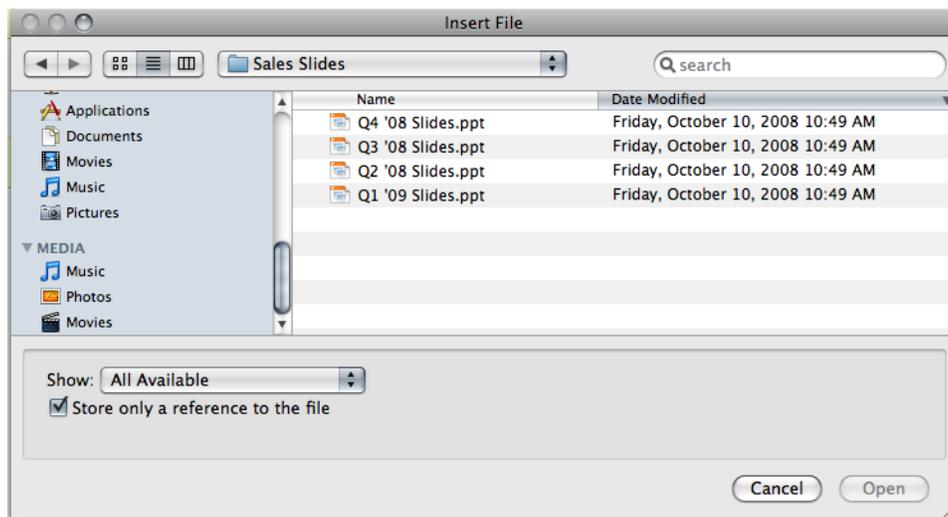


Figure 4: Use the Insert File dialog box to add a link to the original file in a container field



Using The Container Field

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

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

Part I Creating Emails From within FileMaker Pro

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

It is quite easy to send email from within FileMaker using the Send Mail button command. From your contacts or other database, from the File Menu, select "Send Mail"

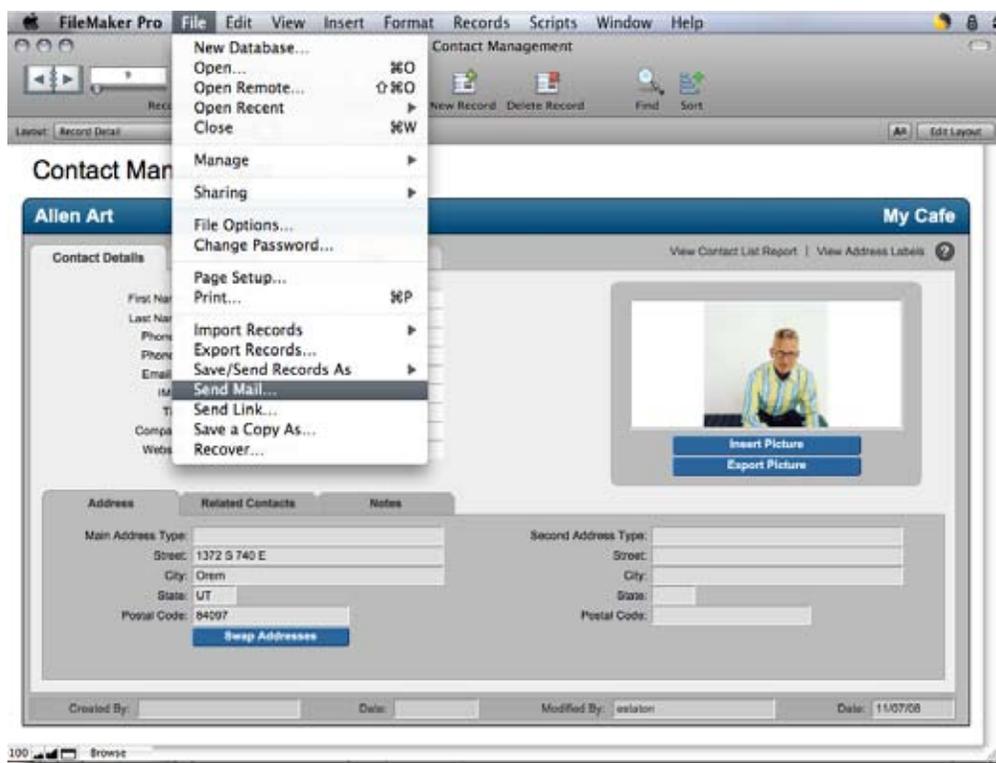


Figure 1: Selecting the "Send Mail" command within FileMaker Pro



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

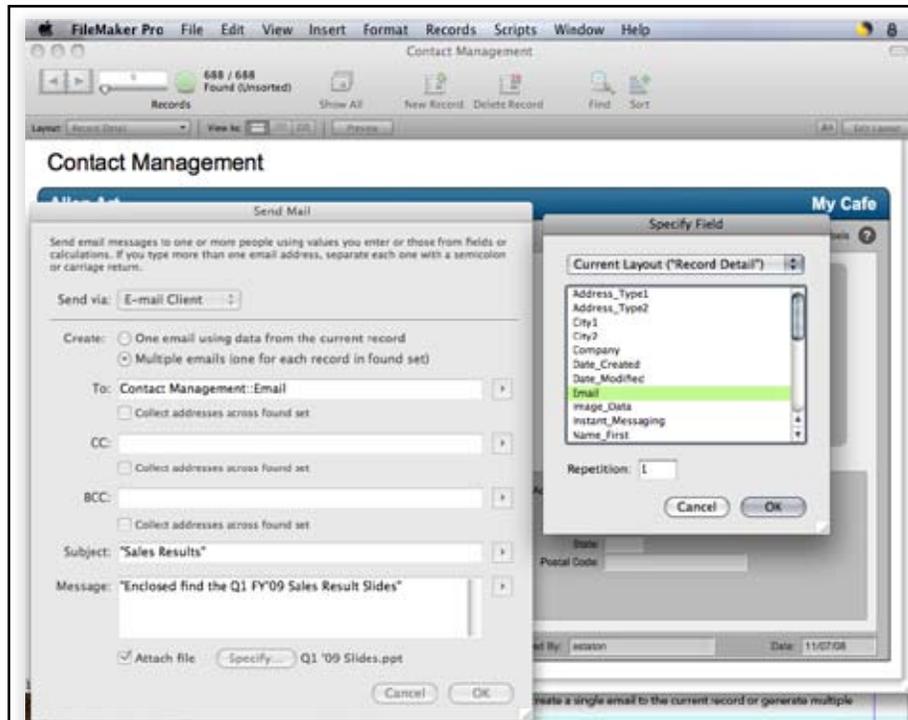


Figure 2: Selecting the “email field” to mail to.

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

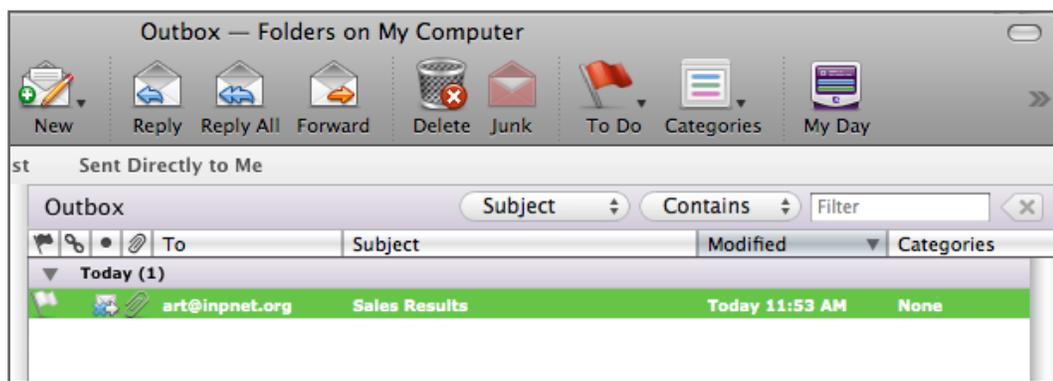


Figure 3: Email ready to be sent from the out box within the email client



Next Steps

Congratulations! You've taken the first step toward managing people, projects, assets and more - the easy way!

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

- Pre-designed, ready-to-use databases for common everyday information management needs.
- Resource Guides that provide a comprehensive list of FileMaker software and services, as well as trainers and consultants who specialize in FileMaker software.
- Customer stories so you can read how others from around the world use FileMaker Pro to manage their information better.
- FileMaker News a monthly electronic newsletter containing notifications of software updates, tips and tricks for using FileMaker Pro in new ways, special offers, and more!

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