FileMaker Solution Framework
Visual Quick Start

For Windows & Mac

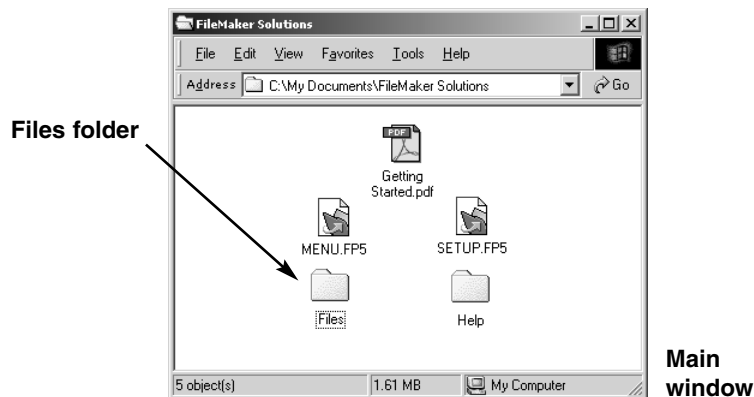QuickStart Guide revised Thursday, September 20, 2001

Overview

About the files

The FileMaker Solution Framework system is designed to serve as a starting point for developing easy to use, customizable business solutions. The files do not attempt to provide solutions to all possible needs of any given business. Instead, you will find the FileMaker Solution Framework system provides the essential files found in most businesses' basic requirements for operation.
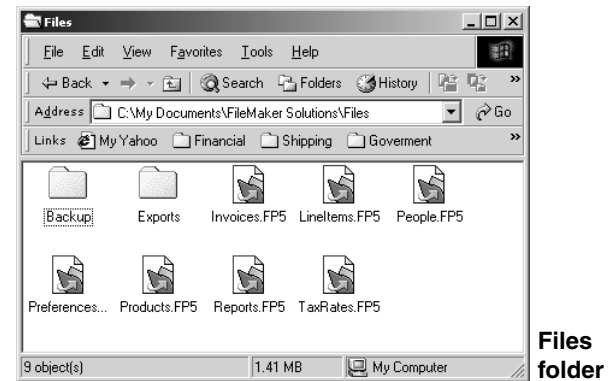
All of the files in the FileMaker Solution Framework system have been provided as open templates. This means you can use the files for your own personal or professional use and may modify them as needed.

NOTICE: The FileMaker Solution Framework system is provided "AS IS" and is not supported directly by FileMaker, Inc. Please read the License Agreement provided within the files or at the end of this document.

Files folder

Main window

How the files are organized

All of the system critical files are stored within the Files folder. The Menu and Setup files will be found outside of the Files folder. The Help file and any future help content will be stored within the Help folder.
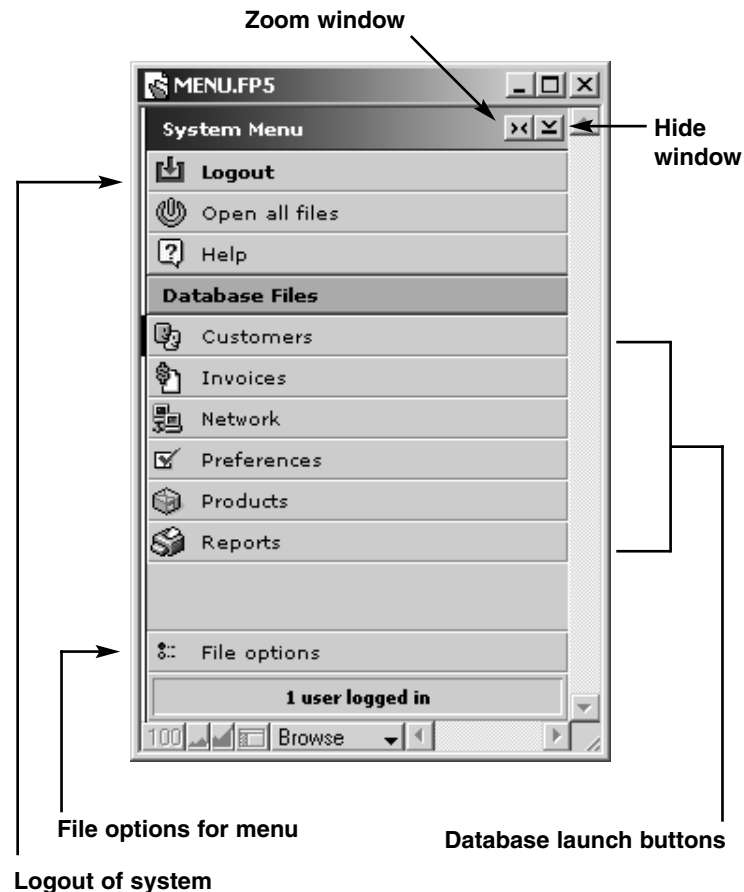

Files folder

Backups and upgrading

Within the Files folder are two folders used for backup and file upgrading.

If you are using the FileMaker Solution Framework system as a single user then you may prefer to backup your files. The backup prompt will happen automatically when clicking the Logout button in the Menu file.

When upgrading your files to an updated or replacement version of any of the system files, the system will use the Exports folder to export the saved data from any older file. This is where you would look to find the data when upgrading to a newer file.

The Menu file

Zoom window

Hide window

File options for menu

Logout of system

Database launch buttons

Navigation

The Menu file is the main navigational tool in the FileMaker Solution Framework system. There are four fixed buttons: Logout, Open all files, Help and File options.

All options below the Help button represent available files in system. You can add new files to the solution and remove files from the solution. You can also hide or show files in the Menu. Companies and developers outside of FileMaker, Inc. may provide enhanced versions or add-on modules which can expand the functionality of the FileMaker Solution Framework system.

NOTE: The Menu file is simply a FileMaker database file. This means each menu item (button), other than those mentioned above, is a record in the file.

In order for the menu item to function properly it must be linked within a script found in ScriptMaker. For more information about working with scripts use the FileMaker Help file within FileMaker Pro.

Deleting files from the system

Because the Menu file is a database, the possibility of accidental record deletion will appear to remove files from the whole system. When a record is deleted from the Menu the file IS NOT removed from the database system. It is simply not available in the Menu anymore. The menu item must be replaced or added if accidentally deleted.

Menu options

Changing menu options

The Menu file provides the options of renaming menu items, changing their icons, adding or removing a network button (FileMaker Pro 5.5 or higher), and sharing or unsharing the databases.
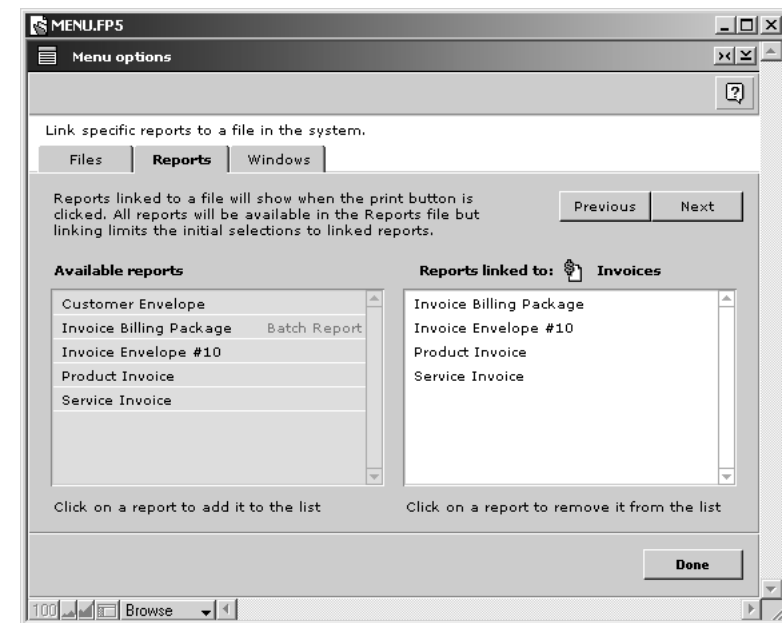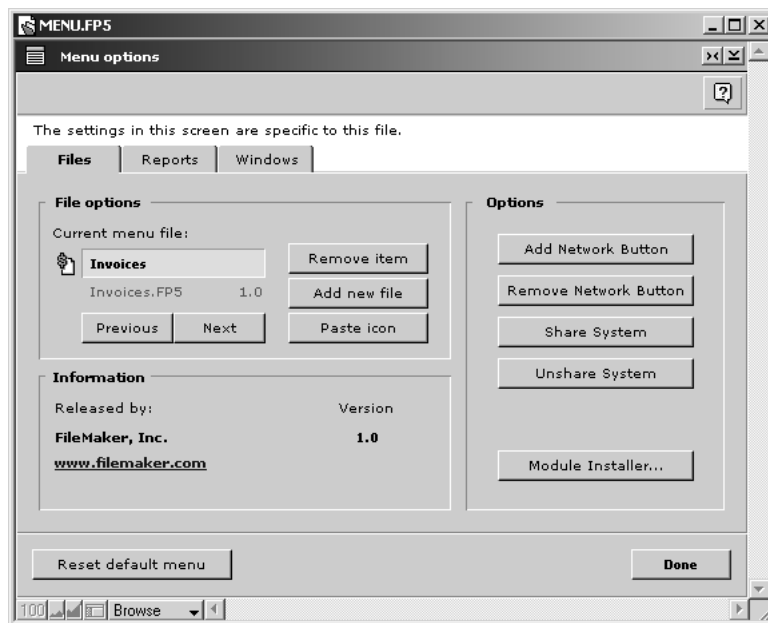
You will also find the version number and developer of any given module in the information area of the files options.

Because FileMaker Pro is a flexible development environment, third party developers may provided add-ons and enhancements that can be installed as modules. Examples of these may be credit card processing, bar codes, letters and correspondence modules and many more. These add-on modules should be installed on the host computer using the Module Installer button. Clients accessing the database over the shared network cannot install modules.
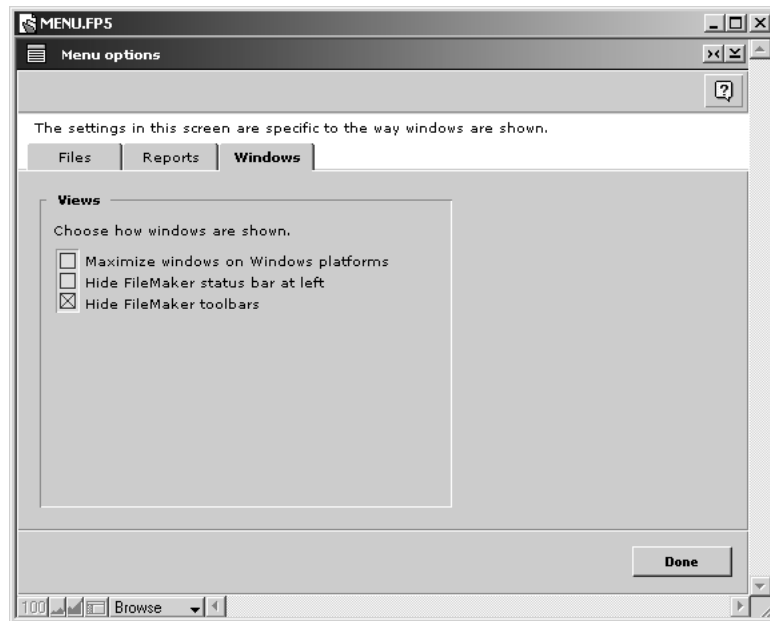
Linked reports

Reports which are available in the reports file can be linked specifically to a given system file. This link is made in the Menu file under the Reports tab.

Menu options

Window behaviors

FileMaker Pro operates differently on the Windows operating system than the Macintosh. Some users may wish to utilize the capabilities of having windows maximize on Windows or hiding the FileMaker Pro status area or toolbars (FileMaker Pro 5.5 or higher) on either platform.

Preferences file

Preferences Logo

Preferences Address

Adding company logo and address

The Preferences file contains preferences used by other files in the system. These preferences include a company logo and address which are used on printed forms. You can add your company logo and your company address to their respective areas.

The logo field will support many of the current image standards. These include:

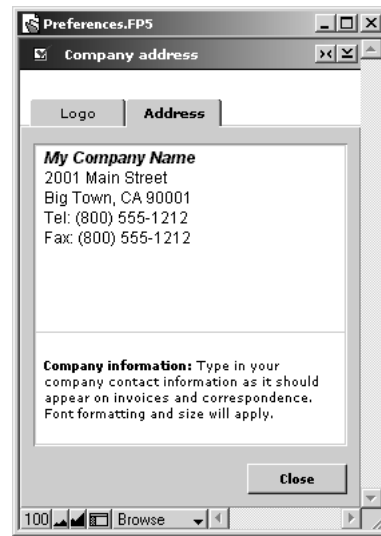|		
GIF	TIF	PICT
EPS	BMP	
JPEG	PNG	

The actual maximum print size of the logo on forms is 3.5 inches wide by 1.25 inches high or 8.89 centimeters by 3.175 centimeters.

Your company address and contact information can be as long as you wish. You will be limited by the number of lines depending on the size of font you select.

The formatting you apply to the text in the address field will be printed as formatted.

People file

People detail screen

People list screen

Managing people

The People file is where you maintain your contacts, customers, clients or however you refer to the people you work with. You'll find fields for company, first name, last name, address, phone numbers, email, web site and notes.

You can choose to display each record according to a variety of display options.

From both the Detail screen and List screen you can create an invoice for the selected record being viewed.

Viewing purchases

Clicking the Purchases button will reveal all of the invoices, within the invoices file, that a person has in the system.

Products file

Adding products

Clicking on the Product file in the Menu will bring up the products file. This file contains all of the products you offer.

It is possible to add shipping and service items to the products file if you charge shipping or provide a service in your business.

Taxes and tax rates

Taxes are calculated based on the tax value found in a given invoice and whether both the item and invoice is taxable. From the products file you can open the tax tables which can be referenced by an invoice based on the zip code used in the shipping fields of an invoice.

Viewing sales by product

When viewing one specific product in the products file it is possible to view all sales of that product in the LineItems file (a file related to the Invoices file). Clicking the All Sales button in the detail screen will show all the sales for that specific product.

Product detail screen

Product list screen

Invoice file

Invoice detail screen

Invoice list screen

Managing invoices

Invoices maintain their own copies of a billing and shipping address. The reason for this is to keep a database of historical orders. Each invoice has settings which determine if the invoice is taxable, billed according to a specific billing period and the status of the invoice.

To access detailed information about a line item related to an invoice, click on the More Info button.

Adding notes

The Add notes button at the bottom of the detail screen will allow you to view the notes associated to a given invoice.

Clicking the Add notes button a second time while the cursor is active within the notes field will create a time stamp placed at the beginning of the notes fields.
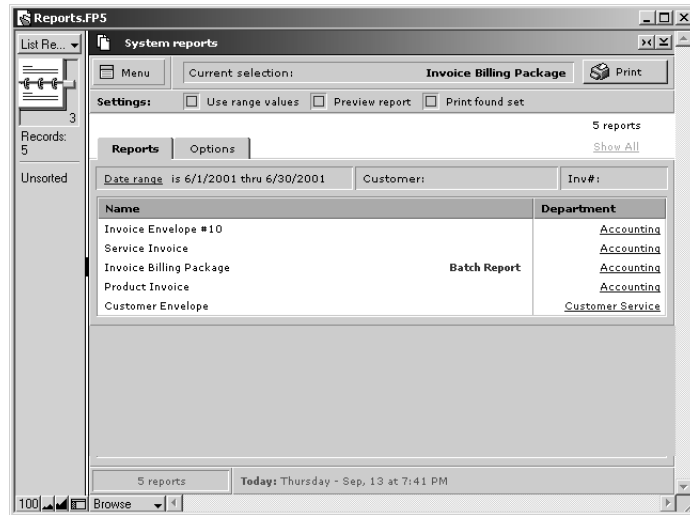
Reports file

Reports list screen

Printing reports

FileMaker Pro, by default, will print whatever is shown on the screen at the time the Print option is used from the menu. To solve this problem, and print a report designed specifically for printing and not for viewing, a reports file was added to the system.

When the print button, within the screen layout, is clicked, the Reports file will be brought to the front. It will present a list of reports relevant to the file where the print button was clicked. The feature of linking specific reports to certain files, such as linking invoices reports to the Invoice file, is controlled within the Menu file (see the Menu information above)

The reports file provides a number of options. One option is using range values for reports which can be based on time, another is pre-

viewing the report and another is printing the found set of records in the file where the report is stored. Once the desired report is selected and options are checked, the report can be printed by clicking the Print button.

Managing reports

As you modify the FileMaker Solution Framework system by creating your own reports or adding third party modules, your number of reports will increase. To manage this aspect you can provide detailed descriptions of what the report will provide and which department the report is primarily used within.

Clicking on a department label in the reports list will filter out all reports specific to that department.

Reports option screen

Reports file

Batch reports

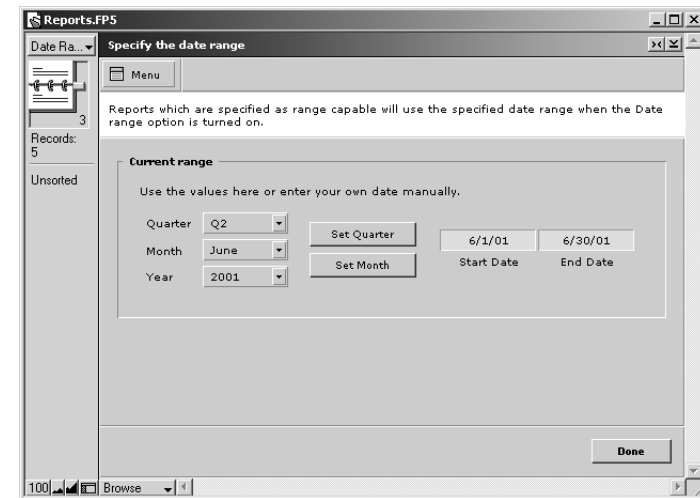A batch report is a special type of report that will print more than one report at a given time. A batch report can contain any number of individual reports provided the reports can all be printed with the options set within the Reports file.

By using a database file to store and manage the listings of available reports the advantages of printing batch reports is possible. Each individual report that makes up a batch report is printed in sequence using the settings specified in the Reports file. Individual reports are linked into a Batch report within the Batch report settings screen.

Batch settings screen

Using date ranges

From the main list of reports in the Reports file, it is possible to specify a date range to be used when printing certain reports. This date range uses a starting date and ending date.

Reports which are designed to use this information will print records and information covered within that range. Because a field must be specified for the range of dates, only a few reports in the FileMaker Solution Framework system can initially take advantage of this feature. Not all reports are range capable.

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