



ebase**Pro** 2.20

Administrators Manual

Manual Date June 7th, 2007

(Note: as we'll be revising manual, please note above date for freshest manual version.)

Copyright© 2006 ebase Organization

ebase® Manual

Table of contents

Chapter 1 Introduction	1
What's a database? A new definition for nonprofit managers.....	1
Here are some ways to think about databases that complement your nonprofit mission:..	1
What is ebasepro?	3
What does ebasepro cost? Do I need FileMaker Pro?	3
Other system considerations	4
What are the system requirements for using ebase?.....	5
Mac OS 9.x.....	5
Mac OS X	5
Windows	6
What operating systems can i use for ebasepro?.....	6
What is the maximum size of database (in number of records) that ebasepro can comfortably handle?	6
What database file formats can you import into and export from ebasepro?	6
Do I need FileMaker Pro® to use ebase?.....	6
What do I need to use ebase over a network?	7
Is there a web-enabled version of ebasepro?.....	7
Is there a way to use ebase securely, from multiple locations over the Internet?	7
Is a multi-user version available for using ebase on a network?	7
Can ebase be used on a peer-to-peer network?	8
Is there a diagram of ebasepro's structure?	8
ebasepro: created by nonprofits, for nonprofits	8
Planning for ebasepro: What to expect.....	9
Planning steps	9
The ebase "Truth in Advertising" statement	10
ebase has significant installation and operational costs	10
ebase technical support is provided primarily through online information resources and the ebase community	10
ebase currently depends on FileMaker Pro and Microsoft Office	11
ebase software and support is developed and maintained by the ebase community.....	12
About this manual	12
Style conventions in this manual	12
Chapter 2: Help and technical support	1
The ebase community: Online technical support.....	1
Where to find ebase documentation	1
Bug report and feature requests	2
To use the ebase Bugzilla installation:.....	2
Chapter 3 Administrator tips	1
Role of a database administrator (dba)	1
Other possible duties include:	3
Principles for maintaining "healthy" data.....	4
Data entry standards and style sheets	4
Building a handbook for your organization	5
yo! Yo! YO! BACK UP YOUR DATA!.....	7
Make your life easier by planning	8
Database Planning, Implementation, and Deployment Tasks	8
Final thoughts on planning and implementation.....	10
Training: The key to effective database management.....	11

Train Users on your Data Entry Standards	11
Train your Database Administrator on FileMaker.....	11
Look for ebase Training Opportunities	11
Setup an ebase Training Plan	11
USING THE EBASE COMMUNITY.....	12
Just because you don't have prior experience as a Database Administrator doesn't mean you can't be a good one!	12
Problems, bug reporting, and getting features you need from ebase.....	13
Problems vs. new features	13
 Chapter 4 Installing ebasePro	1
Installation Types	1
Single-User Runtime	1
Single-User FileMaker Pro	1
client-server	1
Obtaining ebase	2
Distribution Packages.....	2
Download.....	2
Single-User Installation	2
Client-server Installation	4
Benefits of using Filemaker server	4
client requirements	5
server requirements.....	5
Filemaker server setup	6
ebase client-server file installation:	6
POSSIBLE COMPLICATIONS IN A CLIENT-SERVER ENVIRONMENT	11
Upgrading your version of ebasePro	12
Other software and information available to ebase community members.....	12
 Chapter 5 Configuration	1
Initial setup	1
Modify the Admin user record.....	3
Login as "Admin" to configure ebase	3
Admin and "developer" privileges	4
Invoking "developer" access privileges	4
User accounts, privileges, and permission settings	5
The "Admin" function.....	5
Special entries in the Scripts menu	7
Setup ebase.....	7
Setup Payments	8
Setup File paths.....	10
Setup Reports.....	12
Setup graphics.....	12
Setup Custom Labels	13
Win OS Settings	15
Setup organization information.....	15
Setup Billing/receipt information	16
Setup Salutation settings.....	17
Dedup Settings	20
Other Settings.....	21
LOG Codes	21
Menus	22
How ebase menus work	22
To modify a menu.....	23
Users.....	23

Add New User.....	24
Deleting user records	25
Change user passwords.....	26
Default Codes for User Accounts	27
Email Settings for User Accounts.....	27
Error: "Please see your friendly local ebase Administrator"	28
Value Lists.....	28
Review Deletions	29
Maintenance Scripts	30
 Chapter 6 The ebase data structure.....	1
Why does ebase look so weird? How come it's not as simple as outlook?.....	1
Core database structure	2
ebase Navigation tables	5
Ebase Utility databases and tools	5
 Chapter 7 Contacts.....	1
The CONTACTS Overview Screen	3
Entering CONTACT data	3
Add Contact.....	3
Contact data types	4
Adding a group of family records by record replication	5
Avoiding duplicate contact and address records	6
Checking for duplicates when entering a new Contact record.....	6
Checking for duplicates "after the fact".....	8
Address and Locations: Introduction	11
Add Additional Addresses.....	11
Edit an Address or Location.....	12
Designate Primary Address	13
"Seasonal" Addresses.....	14
Add Log Entry: Introduction	15
Add a Log Entry:.....	16
Delete A Log Entry	17
Batch Entry of Log Data	17
Add Profile and Biographical Data.....	18
Demographic data	18
Biographical data.....	19
Creating and editing links.....	20
Marking and Deleting Contacts, Addresses, Links and Log Entries.....	22
Mark (Flag) a Contact for Deletion	22
Deleting an address.....	23
Marking a link for deletion.....	23
Mark a log entry for deletion	23
Deleting records marked for deletion	23
[8] Making ebase work: log entries and codes Error! Bookmark not defined.	
Entries and Codes: The keys to ebasePro	2
background	2
WHY HAVE "CODES" INSTEAD OF FIELDS?	2
Planning is better than reacting	2
Needs assessment.....	3
How does all this "planning" discussion relate to the Log?	3
Getting started using ebase Log codes	3
what is a log entry?.....	3
What is a Code?	3
what is a code set?	4

What is the code generator	4
A simple overview of “Log entry” creation in two examples	4
Refining your Log Codes	6
Further Planning of your code set	6
Define the need	6
create the code.....	7
Which path to follow?	8
What are Codes good for?	9
OVERVIEW: So how, precisely, do you go about creating a code?.....	11
Setting up your organization’s code chart	11
Creating codes in Code Generator.....	12
Details: The code definition screen:	13
Final thoughts on creating codes	18
Editing codes.....	18
Viewing all codes	19
Deleting a code	19
Using your codes to actually do something: Working with Log entries.....	20
Viewing Entries	20
adding Entries.....	20
Managing organizational data with ebase codes.....	21
DEFINING Membership.....	21
Action vs. Event Entries.....	23
Communication and Solicitation Codes.....	23
Sample codes and data that come with ebase	24
Evaluation and Optimization	25
Additional Features:	25
Add a “To Do” Entry for Yourself or Someone Else	25
Thank you features.....	26
Error Message: “Hosed Codes”	26
 Chapter 9 Finds	1
Overview	1
Definition: The “Found Set”	1
Definition: Search Criteria.....	1
How to initiate the Find process	2
Where to Search: Contacts or Entries?	2
Definition: Multiple Found Sets.....	2
Starting a “standard” find	3
Working with Multiple Found Sets:	5
FileMaker Pro “Find” Operators.....	6
QuickFinds.....	8
Find All Contacts	9
Contact Finds, Details.....	9
Find Contacts Using Contact Data: Single Criteria	9
Find by Contact Based on Profile Data	10
Find Contacts Using Contact Data: Multiple Criteria	10
Log Entry Finds, Details.....	12
Find Contacts Using Entry Data: Single CriteriA.....	12
Find Contacts Using Entry Data: Multiple Criteria	13
Working with a Found Set in List View	15
Sorting a Found Set.....	15
Omitting from a Found Set	15
Custom CONTACT sorts	16
 Chapter 10 Email	1

Email overview.....	1
Some caveats	2
Internet email basics.....	2
Configuring ebasePro to send and receive email.....	4
Establish organizational “role” email accounts	4
Configure ebase User accounts to match your organizational “role” accounts.....	4
Test your account configuration	5
Receive an email	8
Send an email to a list	10
Using ebasePro’s special incoming email processing features	17
Process Subscribes.....	18
Process Unsubscribes.....	22
Process Bounces.....	23
Process paypal receipts	24
The Goal: Use ebasePro to start a “virtuous cycle” with your constituency.....	27
 Chapter 11 Reports	2
Reports: Overview	2
A note on printing	2
A note on exports	3
Before you run a report.....	3
Technical overview	3
Here’s how the report process generally works	4
For developers.....	4
Note on Report description format	5
Generic	5
Avery 5160 labels	5
Avery 5160 labels+email	5
Avery 5160 labels ExpDate	6
Avery 5160 labels Streamlined.....	6
Basic Info.....	6
Basic Info+ 3-col	7
Basic Info+, Export	8
Email list export	9
Phone Book	10
Phone List.....	10
Single Contact Log Entry.....	11
Contact Reports.....	12
All Addresses for Contacts	13
Contact History	13
Contact Link report	15
Contacts Export.....	16
Contacts Listed by Log Entry.....	17
Contact Reports Export:	18
Mail House Address Export	19
Name and Home Address Export.....	19
Log ENTRIES REPORTS.....	20
Amount Report (Detail).....	20
Amount Report (Summary).....	21
Basic Log Entry Report.....	21
Quantity Report	23
Membership Reports	24
Member export	24
Member renewal export.....	25
Members Current.....	26
FUNDRAISING Reports	27

Activity Response	27
Complete Donor History	28
Deposit report	29
Donor & Solicitor report	31
LYBUNT List.....	32
Member Giving – YTD	33
Pledge Report.....	34
Response Analysis	35
Soft Credit Report.....	37
Solicitation Deposit report.....	38
Solicitor report	39
SYBUNT List.....	39
LEGACY REPORTS.....	40
ContactsAll.csv	40
ContactsAll.htm	42
LogAll.csv	44
LogAll.htm.....	46
Special Use Reports.....	48
Codes Report.....	48
Email Bounce Report.....	50
Export for Enhanced Data- LCV.....	51
Update Seasonal Address.....	52
Omit Location Dups	52
 Chapter 12 Import Tools.....	1
two Notes on the Import Chapter	1
Import Menu	2
Import Data Menu	2
Import from Ebase v1.....	3
Which Version?	3
Import Which Files?	4
Import Which Records?	4
Use Standard Field Mappings?	4
Default Bucket 3 Value	5
Source Codes	5
Translate Source Codes	5
Ready to Extract Data	6
Where Do ebase v1 Fields Go in ebasePro?	7
Customized Versions of Ebase v1: Issues for Import.....	8
Import External Data	9
Import External Data - Choose Import Tool.....	9
External Import Wizard Capabilities: Overview	10
External Import Wizard - Step 1: Choose Configuration/Mode	10
External Import Wizard - Step 2: Extract Source Data	11
External Import Wizard - Step 3: Import What Types of Records?	12
External Import Wizard - Step 4: Phone/Fax/Email Settings.....	13
External Import Wizard - Step 5: Map LOGFIELDS	13
External Import Wizard - Step 6: Define Entry Codes	14
External Import Wizard - Step 7: Save Configuration	16
External Import Wizard - Step 8: Ready to Preview	16
External Import Wizard - Field Details - Address Fields.....	16
External Import Wizard - Field Details - Email/Phone/Fax/URL.....	17
External Import Wizard - Field Details - LOGFIELDS	18
External Import Wizard - Field Details - Name Fields	20
External Import Wizard - Field Details - ID Fields	20
External Import Wizard - Field Details - Profile Note.....	21

External Import Wizard - Field Details - Complete Field List.....	21
External Import Wizard - Tips for Extracting Source Data	24
Import External Data--How LOGFIELD Mapping Works.....	24
Preview Records in Preview Area	26
Preview Area: Overview	27
Move Data to ebase: Overview	27
Dupcheck Options	28
Review Duplicate Contact Records - ebase.....	29
Review Duplicate Contact Records - Preview Area	29
Review Unlinked Log Entries.....	30
Re-Import.....	30
Clear Preview Area.....	31
Import leaf data	31
 Chapter 13 Maintaining your data	1
Backup ebase regularly	1
Create a backup routine	1
Maintain a library of archival backups	1
Save your Hard copies	2
Special Admin functions.....	2
Review Deletions.....	2
Edit Payment Entries	2
Maintenance Scripts	3
ADMIN>Maintenance Scripts	3
ADMIN>Maintenance Scripts>View Developer Scripts.....	4
Disaster management.....	5
Damaged Files: DO NOT RECOVER! Restore from Backup	5
Why do files become corrupted?.....	5
How to avoid file corruption	6
You can prepare for recovery in the event of file damage:	6
Virus Protection.....	6
 Chapter 14 Developer Documentation	1
ebasePro naming and terminology conventions.....	1
Interface terminology	2
Table naming convention	2
Location reference convention	2
Field naming convention.....	3
Script naming conventions	4
Layout naming conventions.....	4
Relationship naming conventions.....	5
Primary menu structure	5
Entry coding conventions	5
Abbreviations used in ebasePro fields, scripts, and relationships.....	6
Integrating custom functionality into ebase v2.....	6
Three levels of new module integration.....	6
ebase® Entity List	9
 Chapter 15 Thank you responses	1
Single Thank You letters.....	1
Thank you “required” OR not.....	1
“THANK YOU SENT?” IS Date stamp modifiable	1
One-at-a-time thank you’s	2
Setting up a template.....	3
Bulk thank you’s	3

Chapter 16 Glossary

Chapter 17 Appendix

Acknowledgements

ebasePro is the product of a collaboration of more than 100 nonprofit developers. It is impossible to name all the people involved in producing this version but credit is due the individuals mentioned below.

Based on the prodigious work to build ebase Pro 2.0 – 2.11, the ebase Pro 2.20 coding was updated by Allen Poole and Chris Wagner. Substantial testing was done by Tim Leed, Beth Hynes, Allen Poole and Chris Wagner, with additional help from Clif Graves and Bob Schmitt. *Thanks to everyone who has posted a bug* – we look at all of them and address as many as possible!

We've seen extraordinary efforts with hundreds of hours on the part of individual members of the ebase community to put this build together.

This manual has been edited by Beth Hynes. Many fingers tapped keyboard to provide substantial rewriting: Cynthia Tarascio, Dave Shaw, Linda Saffell, Larry Bednar, Calista Carter, Tim Leed, Barry Madore, Allen Poole, and Jenny Council. They have all have been active in revising specific chapters of the ebasePro 2.20 Administrator's manual in content and style, often suggesting improvements to explain sometimes difficult issues.

Currently ebasePro is supported by the nonprofit ebase.org and many ebase community volunteers including the Technical Advisory Committee: Larry Bednar, Clif Graves, Beth Hynes, Tim Leed, Barry Madore, Allen Poole, Dave Shaw, Bob Schmitt, Cynthia Tarascio and Chris Wagner.

Organizations that have been early adopters and site testers for ebase Pro 2.20 include the Association of Hole in the Wall Camps, Dutchess County Arts Council, and others. Their real life usage and feedback made ebase Pro 2.20 a better product.

To read more on the history of ebase, please visit www.ebase.org and look in the About section.

Thanks to everyone who put so much time and energy into this product. Comments, suggestions, and feedback from countless individuals and nonprofit organizations form to make ebase. Development of ebase is done by the generosity of volunteers.

ebase truly is by nonprofits for nonprofits!

Finally, this manual is a work in progress. It has been written, added to, and edited by dozens of people and you may find instances of stylistic and grammatical inconsistency. Further, you may even find egregious inaccuracies. They are all our fault.

NOTE: In an effort to keep this manual up-to-date and to attempt to immediately correct any inaccuracies, the ebase website has a forum to tell us specifically what is wrong with it and how you'd like to see it fixed.

Beth Hynes
Minneapolis, MN
June 2007

Distribution license for ebasePro (r) 2.20

NOTE: This license is modeled on the BSD Open-Source license:
<http://www.opensource.org/licenses/bsd-license.php>

Copyright (c) 2003-2007, ebase.org. All rights reserved.

Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

- Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer.
- Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.
- The name of ebase(r) nor the names of its contributors may be used to endorse or promote products derived from this software without specific prior written permission.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL GROUNDSPEED.ORG OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

ebase may rely on other software for its functionality.

These software products have their own license agreements (see below).

ebase complies with these agreements, and redistributions must also comply with these license agreements, to the extent that redistributions rely on software not included under this license.

INDEMNIFICATION. Portions of the software are (c) 1984-2003 FileMaker, Inc (FMI). All rights reserved. You will indemnify and hold FMI harmless from any and all claims, damages, losses, liabilities, costs and expenses (including reasonable fees of attorneys and other professionals) arising out of or in conjunction with your use of ebase(tm).

USER WARNING. ebase contains password(s) which can only be provided by Groundspring.org. You have been provided all appropriate passwords, as well as documentation about how to change them. You agree to document changes to your passwords, and to not ask FileMaker, Inc., or any other third party, to determine any password in any file associated with your licensed copy of the software.

Plug-in License for POP3-It, SMTP-It, MD-Dialogue, and MD-Window

User may not redistribute the enclosed plug-ins or plugin registration module (Lokey.200) without acquiring a separate license from the plug-in owners (Comm-Unity Networking Systems, and Medical Databases, Inc.) and licensor (Groundspring.org).

In addition, user may not: (i) modify, translate, reverse engineer, decompile, disassemble (except to the extent that this restriction is expressly prohibited by law) or create derivative works based upon the Software or Documentation; (ii) copy the Software or Documentation (except for back-up purposes); (iii) rent, lease, transfer, or otherwise transfer rights to the Software or Documentation; or (iv) remove any proprietary notices or labels on the Software or Documentation.

Title, ownership, rights, and intellectual property rights in and to the Software and Documentation shall remain in Licenser. The Software and Documentation is protected by the copyright laws of the United States and international copyright treaties.

Plug-in License for EPY

Copyright (C) 2003. Todd Koym. todd.koym@edgertonfoundation.org

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA

ebasePro uses Filemaker Pro software

EbasePro 2.20 is created using FileMaker Pro software. FileMaker Pro is copyrighted by FileMaker, Inc. (c)1988-2007. This software has been developed and is distributed in accordance with licensing terms established by FileMaker, Inc.

Chapter 1 Introduction	1
What's a database? A new definition for nonprofit managers.....	1
Here are some ways to think about databases that complement your nonprofit mission:.....	1
What is ebasepro?	3
What does ebasepro cost? Do I need FileMaker Pro?	3
Other system considerations.....	4
What are the system requirements for using ebase?.....	5
Mac OS 9.x.....	5
Mac OS X	5
Windows	6
What operating systems can i use for ebasepro?.....	6
What is the maximum size of database (in number of records) that ebasepro can comfortably handle?	6
What database file formats can you import into and export from ebasepro?	6
Do I need FileMaker Pro® to use ebase?.....	6
What do I need to use ebase over a network?	7
Is there a web-enabled version of ebasepro?.....	7
Is there a way to use ebase securely, from multiple locations over the Internet?	7
Is a multi-user version available for using ebase on a network?	7
Can ebase be used on a peer-to-peer network?	8
Is there a diagram of ebasepro's structure?	8
ebasepro: created by nonprofits, for nonprofits	8
Planning for ebasepro: What to expect.....	9
Planning steps.....	9
The ebase "Truth in Advertising" statement	10
ebase has significant installation and operational costs	10
ebase technical support is provided primarily through online information resources and the ebase community	10
ebase currently depends on FileMaker Pro and Microsoft Office	11
ebase software and support is developed and maintained by the ebase community.....	12
About this manual	12
Style conventions in this manual.....	12

Chapter 1 Introduction

WHAT'S A DATABASE? A NEW DEFINITION FOR NONPROFIT MANAGERS...

A database is a computer-based record keeping system: a collection of data whose overall purpose is to record and maintain information and organized so that its contents can easily be accessed, managed, and updated.

Various software packages are available to help you organize information in the form of a database: Access, FileMaker, Excel, and lots of other programs help you create databases to store your information.

Don't think of your database as software, or data storage, or that thing that drives you crazy.

Here are some ways to think about databases that complement your nonprofit mission:

Think of your database as your best organizing tool—not just a contact manager.

Most of us use our databases as simple contact managers, and a place to organize all the payments people make. But your database CAN and SHOULD do much more than that. Your database should do three things for your organization:

1. **Record every way that each person relates to your organization:** record all payments, interests, volunteer actions, bio information and more. This is how you get to know your community.
2. **Facilitate targeted, personalized communications.** We all know the organizing adage, "Organize people where they're at." What does that really mean? It means communicate with people about what interests them, in a way they can understand. Your database should help you target your messages by identifying subsets of your lists, (like all the people who live within 50 miles of a nature preserve you're working to protect), and then deliver the message in a way they want to hear it --by mail, email, fax etc.
3. **Analyze the effectiveness of your communications.** You're busy, and you don't have time to waste. Your database should help you quickly identify which communications went over well, and which you should never attempt again. Learn what works with your community and give them more of the same!

Think of your database as another staff member—an investment, not a purchase.

You can hire a Development Director with the best qualifications in the world, but if you don't give her the information she needs--your history, who makes up your constituency, where to find the office supplies--she can't do her job well. You need to invest time and resources in your staff to help them do the best jobs possible throughout their careers in your organization.

Your database needs the same time and attention. It can have the most impressive feature set, but if you don't nurture it, those features are useless.

For example, your database may help you create personalized letters, but if you haven't taken the time to clean your data and get rid of duplicates, you'll be wasting your money and irking your supporters by sending them multiple copies of the same letter.

Put the time and energy into your database and get ten times back in efficiency and effectiveness.

Think of your database as an opportunity to change the future—not just record the past.

You have ways of doing things. When checks come in, certain people open them and process them in specific ways. When someone calls to volunteer, your organization has a specific way of handling the situation. These practices are the backbone of every organization. Without them, no volunteers would get scheduled or checks processed.

1. **Record policy:** ebasePro is designed to actually become a record of your business practices. That's what the ebasePro "log entries" are all about. The progression from Prospect to Major Donor is tracked by logging the events that occur during the development of your initial letter, calls, visits, and the ever-increasing donations and activity.
2. **Evaluate practice:** The work required to define these practices and configure your database to allow tracking with log entries is a great opportunity to reexamine and validate your business practices. The use of your database to track information provides

an opportunity for your organization to identify the most effective relationship development practices. Every organizational “business practice” needs to be examined from time to time, and examining your database structure is the perfect opportunity to do just that.

WHAT IS EBASEPRO?

Created by nonprofits, for nonprofits... ebasePro is powerful, affordable, customizable database software.

ebasePro is a set of FileMaker® Pro database templates designed to help nonprofits manage their relationships with their constituents. Created by a community of every-day users, trainers, database developers, and volunteers, ebasePro meets the unique needs of medium-sized nonprofit organizations with complex data management requirements.

Together, this community has created a customizable database platform to help you do much more than record contacts with individuals – ebasePro will enable you to build strong and lasting relationships with your constituents and help your organization integrate its data about members, donors, volunteers, and activists.

ebasePro helps you:

- Target communications to your ideal audiences,
- Move donors and volunteers up the ladder of engagement,
- Easily manage multiple mailing and email lists,
- Personalize email to list members,
- Analyze solicitation response rates; and,
- Segment your data so that only the right users see the kinds of data appropriate for their jobs.

With ebasePro, you can:

- Keep track of all types of contacts (organizations, volunteers, staff, activist, etc.) so that information on those relationships is retained within your organization, even after staff turnovers,
- Create custom form letters and mailing labels,
- Track pledges and donations,
- Assign tasks to other users of ebasePro; and,
- Create your own personalized coding system to keep track of solicitations, activities, events, (and virtually anything else you want to track).

WHAT DOES EBASEPRO COST? DO I NEED FILEMAKER PRO?

The single-user version of ebasePro is available free of charge on the ebase.org web site.

The ebasePro single-user download includes this manual (in .pdf format) which describes how to open ebase files and look at their source code (see the section on user access levels). However, to view or modify ebasePro code, you need a licensed copy of Filemaker Pro.

The download distribution includes a free "runtime" version of FileMaker Pro that lets you use the ebase templates. The runtime engine provides access to almost all of ebase's functionality,

including everything you need to evaluate ebase and/or use it in a small organization on a single computer.

New users should note that while ebase is freely available, the hardware systems and software you need to run ebase on is not free. While you can use ebase with the runtime version of FileMaker Pro, ebase performance is optimized for use with FileMaker Pro (versions 5, 5.5 and 6).

If you want to use ebase in a multi-user setting...

Some features of ebase cannot be accessed without FileMaker Pro. Using ebase in a multi-user setting requires purchase of FileMaker Server to host the data (on its own dedicated server) and a copy of Filemaker Pro for each client.

While it is physically possible to setup ebase to operate in a client-server format using FileMaker Pro across a network without FileMaker Server hosting, we have found this to be inherently unstable and do not recommend or support this method of using ebasePro in a multi-user setting. Don't do it.

If you need to have multi-user access to ebasePro, plan on acquiring FileMaker Server and a separate computer to use as a host machine. For organizations that value their data and staff time, the advantages of data integrity and network performance far outweigh its extra cost.

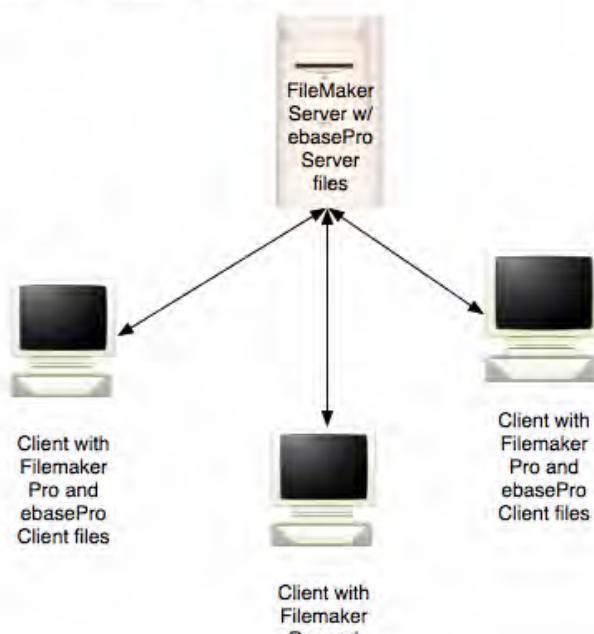
For more product details about FileMaker software, please see the FileMaker web site, <http://www.filemaker.com/>.

Other system considerations

Beyond the initial software costs for using ebase, there may be additional expenses associated with implementing ebase. To use ebasePro effectively, you will also need:

- A reliable backup system.
This is critical. No system is crashproof. If you value your time and your data, you need a reliable backup system that gets used regularly.
- A broadband Internet connection (DSL or better) to take advantage of some of the email functions of ebase, plus allow your organization to get remote support should you need it.
- A reliable power supply such as a battery back up (in case someone trips over the cord that plugs the computer into the wall); and software that protects your database computer from viruses and keeps your hard drive in good working order.
- A firewall (or "personal firewall" software) is recommended to increase the security of your computer.

ebasePro Client-Server



It's also important to factor in the expenses associated with staff training, hiring a consultant to make customizations, and expenses or time required for your ebase administrator's database management work. You will likely have to pay these costs no matter whether you use ebasePro or another database application..

By freely distributing the software, ebase.org makes it possible for you to invest in your "human ware" -- skilled staff -- by making your software affordable.

New users should note that some database customizations may require input from a database consultant. ebase is highly customizable and requires substantial time to shape it for optimal use with your organization. Your staff will need to spend time creating your custom code set and you may need to put resources into building custom reports and features.

ebasePro depends on adequate technical infrastructure in your office and dedicated staff or consultants devoted to information technology. It is highly recommended that appropriate staff receive training on how to use ebase.

Support services for ebasePro are available through the ebase web site.

What are the system requirements for using ebase?

Full single user installation with documentation will require a minimum of 30 MB of free space. Average users should allow 60+ MB to allow space for data. Plan ahead, some ebaseClassic installations have grown to over 300 MB.

In general, FileMaker, (and by extension), ebasePro are very disk intensive applications. We recommend using fast hard drives (e.g. 7200RPM SCSI drives or ATA RAID arrays), with the fastest network connections possible in order to handle larger amounts of data (e.g. over 10,000 contacts).

The **minimum** system requirements for running ebasePro are:

Mac OS 9.x

- Hardware Requirements: G-series chips or later, 128 MB of RAM, 60 MB free disk space, and CD-ROM drive
- Software Requirements: Mac OS 9.x
- Network Sharing Requirements: TCP/IP network
- Backup system capable of backing up database
- Broadband Internet access

Mac OS X

- Hardware Requirements: Apple G3 computer better, 256 MB of RAM, 60 MB free hard disk, and CD-ROM drive.
- Software Requirements: Mac OSX 10.2 or better
- Network Sharing Requirements: TCP/IP
- Backup system capable of backing up database
- Broadband Internet access

Windows

- Hardware Requirements: Intel-Pentium II compatible computer or later, 128 MB of RAM, 60 MB free hard disk, and CD-ROM drive
- Software Requirements: Windows 2000 or Windows XP preferred, but ebasePro will work with Windows 98 and Windows NT
- Network Sharing Requirements: Ethernet TCP/IP network
- Backup system capable of backing up database
- Broadband Internet access

WHAT OPERATING SYSTEMS CAN I USE FOR EBASEPRO?

ebasePro can run on these operating systems:

- Windows 98
- Windows NT
- Windows 2000
- Windows ME
- Mac OS X
- Mac OS 9.X

Installers are provided for the most recent versions of Windows and Macintosh operating systems. ebasePro is also provided as archive files which can be used to install ebase on computers whose operating systems cannot use the installers.

WHAT IS THE MAXIMUM SIZE OF DATABASE (IN NUMBER OF RECORDS) THAT EBASEPRO CAN COMFORTABLY HANDLE?

We recommend ebasePro for databases of up to 30,000-40,000 contact records (plus all their related data).

WHAT DATABASE FILE FORMATS CAN YOU IMPORT INTO AND EXPORT FROM EBASEPRO?

ebase can import records from most common file formats: tab-separated text (*.tab; *.txt); comma-separated text (*.csv; *.txt); SYLK (*.slk); DIF (*.dif); Lotus 1-2-3 (*.wk1; *wks); Basic (*.bas); Merge (*.mer); dBase (*.dbf); Microsoft Excel (*.xls; *.xlw), and ODBC Data Sources. For importing data from databases that use other file formats (such as Access and Oracle), first you will need to export your legacy data into one of the formats listed above and then import the data into ebase.

DO I NEED FILEMAKER PRO® TO USE EBASE?

This depends. With ebasePro (single-user installer), you don't need FileMaker Pro since we provide a "runtime" version of FileMaker with ebase. The "runtime" provides access to most of ebasePro's functionality, including what you need to evaluate ebase and/or use it in a small organization on a single computer.

However, to customize and use all of the capabilities of ebasePro, you will need FileMaker Pro 5.5 or 6.

ebase.org, FileMaker Pro, and TechSoup have teamed up to provide nonprofits with a software bundle that allows groups to acquire FileMaker Pro at a low price.

WHAT DO I NEED TO USE EBASE OVER A NETWORK?

To use ebase on a network, you will need FileMaker Pro 5.5 or 6 on each client machine, and FileMaker Server 5.5 on a separate, dedicated computer (used to “host” the files containing data to be shared). The server computer cannot be running any other network services. (The runtime version of FileMaker Pro provided with ebasePro will NOT substitute for a full version of FileMaker Pro in this type of use).

Look on the ebase website for latest information about software bundling for nonprofit discounts.

Check out PriceGrabber.com for quotes on multi-user installation of FileMaker Server with various numbers of client machines.

IS THERE A WEB-ENABLED VERSION OF EBASEPRO?

No. However, we have put together an example of how to use the ebase data structure to create a data-driven web site with ebase-CDML (available to ebase community members in the Software section). Some groups have tied their web site into ebase using a variety of techniques including email data transfers (sending email to ebase with structured data that can be automatically imported into ebase using its email tools), and data exports and imports.

If you wish to investigate how to use the ebase data structure to drive a dynamic web site, you will need a dedicated computer with FileMaker Pro 5.5 or 6 Unlimited, and a fixed IP address connecting your computer to the internet. Then, download the ebase-CDML package at <http://www.ebase.org/> and look in the archives.

IS THERE A WAY TO USE EBASE SECURELY, FROM MULTIPLE LOCATIONS OVER THE INTERNET?

Yes. ebase can be used with a variety of terminal service applications, from VNC (free), to Timbuktu Pro and PC-Anywhere (for single-user access), and Windows Terminal Services and Citrix WinServer (for multi-user access). Any secure setup requires a multi-user installation first. Then, terminal services applications need to be installed on the multi-user system.

IS A MULTI-USER VERSION AVAILABLE FOR USING EBASE ON A NETWORK?

Yes, ebasePro has a multi-user version that enables multiple users to access common ebase data at the same time on their own computers.

For use by multiple users, we recommend setting up a client-server system with a dedicated computer using FileMaker Pro Server to host ebase files. A client-server system requires the use of FileMaker Pro 5.5 or 6 on each client computer and FileMaker Server 5.5 on a dedicated “server” computer. See the most recent information on the ebase.org web site.

We do not recommend nor support the use of ebasePro using FileMaker Pro to host ebase files in a psuedo-client-server networking environment. You will lose data. (See below "Can ebase be used on a peer-to-peer network?")

We STRONGLY recommend that you download ebase (single user installer) and get acquainted with it before attempting to setup a client/server system (see instructions in the ebase web site).

CAN EBASE BE USED ON A PEER-TO-PEER NETWORK?

Not reliably. While FileMaker Pro has some database hosting capacities, these capacities are inadequate for use in hosting ebasePro.. **The potential problems inherent in FileMaker's peer-to-peer networking architecture will cause you to lose data.** We strongly recommend the use of FileMaker Server in all multi-user installations of ebasePro.

IS THERE A DIAGRAM OF EBASEPRO'S STRUCTURE?

A high-level entity relationship (ER) diagram for ebasePro is included with the software. This ER diagram illustrates how ebasePro stores data. (The ER diagram is also located in the section of this manual that describes the basic structure of ebasePro.)

To view the top-level ebasePro ER diagram:

1. Launch ebasePro and login as an Admin (Username: Admin / Password: Admin).
2. At the Main Menu, go to the Scripts heading, then select "About ebase v2...".
3. At the bottom of the screen, click on the "View ER diagram" link.

EBASEPRO: CREATED BY NONPROFITS, FOR NONPROFITS

In the 1980's, ebase started out as proprietary software to help a small group of nonprofits in the Northern Rockies and Pacific Northwest. Initially developed and released by Desktop Assistance (a nonprofit based in Helena, Montana) as open-source software, thousands of groups around the world have downloaded it.

The demand for changes to accommodate very different kinds of organizational needs led to the development of the ebase "community", a collaborative experiment to create and distribute software to meet the needs of nonprofit organizations. The first experiment of its kind, the ebase community is designed to be self-sufficient and self-sustaining.

Bob Lewis, a former columnist at InfoWorld, characterized software as "an opinion about how a business should run." ebase didn't spring from one or two developers heads; ebase was created by nonprofit staff and consultants, based on shared opinions about how nonprofits should relate to their constituents. ebase reflects the outcome of hundreds of discussions about nonprofit management procedures and most features are compromises between various views.

Not just software, ebase is also a community of users and developers collaborating to benefit the entire nonprofit community. ebase is a grassroots experiment by nonprofits to improve their organizational efficiency and effectiveness. At the time of this writing, ebasePro has been downloaded by more than 35,000 organizations worldwide. Properly installed and configured, it provides features equivalent to applications that cost \$2000 and up.

ebasePro is “open-source” software

ebasePro’s underlying data structure can be modified by anyone using FileMaker Pro with the “developer” level access privileges. It is distributed with the Berkeley open-source license.

Unlike proprietary software, users are encouraged to learn about the inner workings of the software and to suggest improvement to the code, the user interface and the accompanying documentation.

PLANNING FOR EBASEPRO: WHAT TO EXPECT

Adopting new database software is often a time-consuming process. No exception to the rule, ebasePro requires a thoughtful approach. Be prepared to send time up-front to ensure your successful ebasePro adoption.

Please do not expect to download ebasePro one day and put it into production on the next!

The setup and configuration of ebasePro is critical to how well it will work for you. ebasePro is very flexible -- it's easy to go down a path that may not be particularly rewarding for your organization. Plan your implementation carefully, taking into account the information contained in this section of the manual.

Planning steps

1. **Read the ebase "Truth in Advertising" statement** and take it's advice to heart (see next section).
2. **Assign a staff member to the role of database administrator.** Ideally, this person should have the time and desire to be administrator. ebasePro requires that someone in your organization know the history of your data, have the authority to make changes to your group's data, have the authority to make potential users adhere to data integrity standards (i.e. spell names properly, use US Postal Service conventions for addresses, etc), and be willing to work within the ebase community for technical support. If no one on your staff is able or willing to be your organization's database administrator, consider using a piece of commercial software.
3. **Assess your current technology infrastructure** (hardware, software, network and backup systems, etc.) to ensure you have what you need to successfully implement ebase. ebasePro requires specific hardware systems and software versions. Consider using TechAtlas, a free technology planning tool (search for “TechAtlas”), to assess your technology needs relative to an ebase implementation and develop a technology plan, budget, and implementation timeline.
4. **Familiarize yourself with using ebase by reading** the "Getting Started Guide". Pay particular attention to how ebase (1) stores family and organizational data, and (2) uses "entries" to record attributes of a contact (instead of FileMaker checkboxes and pop-up lists).
5. **Conduct a database planning process that includes these steps:**
 - **Identify all existing data sources**, how and by whom this data is used, and the forms and reports used with this data. This can include attendance records stored in excel spreadsheets, listserves membership lists, rolodexes, email addresses stored in various email clients, financial databases, fundraising databases, merchandise sales records, etc.
 - **Determine which organizational processes and reports ebasePro needs to support.** It is best to start small and incorporate other processes into ebase after you have become familiar with the software.

- **Develop an ebasePro code set** that will capture these processes and yield the reports you need.
6. **Map your existing data to ebase's data structure and your new code set.** Import existing data into ebase using ebase's Import Wizard. Depending on the complexity of your legacy data, you may need assistance from an ebase consultant.
 7. **Ensure that you have adequate backup systems** before you begin using ebase. How often will you back up your ebase files? Who is responsible for backing up and maintaining the log of backup dates and storage locations? Remember that backup systems include paper backups. You may need to refer to original documents in the event of a system crash or if the accuracy of data in the database is called into question.
 8. **Develop and implement a staff training plan.** Make your investment in people a priority. An unused or misused database is almost worse than no database at all!

THE EBASE "TRUTH IN ADVERTISING" STATEMENT

This statement was created in response to a discussion that began on the ebaseClassic support list and was carried over to the ebase developers list in May, 2002. A group of ebase consultants created the first draft of this document which was substantially revised throughout July of 2002 and approved by the developer community in August, 2002. It was amended after the acquisition of ebase by Groundspring.org.

The community of ebase consultants, trainers and developers want to fairly describe the most important advantages and challenges of ebasePro to enable you to evaluate the appropriateness of ebase for your organization. To that end, please be advised:

ebase has significant installation and operational costs

ebase is freely available open-source software and is remarkably economical to use. But the use of ebase is not free of cost, especially when first installing it.

ebase will require a significant investment of your time and, most likely, the technical assistance of qualified IT staff or consultants (especially in the case of the multi-user, client-server version) for effective installation, configuration and customization.

Further, your productivity using ebase will depend on:

- Acquiring and maintaining adequate technical infrastructure in your office,
- Appropriate training of staff on the use of ebase, and
- On-going staff time and effort to operate it consistently.

ebase support, upgrades, and premium services are benefits of membership in the ebase online community. Membership is currently \$50 per year for individuals and groups with annual budgets under \$100,000; \$75 per year for groups with larger budgets.

ebase technical support is provided primarily through online information resources and the ebase community

- ebase ships with documentation about the application. Additional documentation and documentation updates are available on the ebase.org web site.
- ebase technical support is provided primarily through the ebase online Support Community which currently consists of active email lists, a Frequently Asked Questions

(FAQ) database, supplemental documentation, additional software modules and upgrades, and a directory of trainers and consultants in your area.

- A growing list of ebase user groups, consultants, developers and trainers is maintained on the ebase Community web site to locate resources in your area. Fee-based technical support is provided by consultants and trainers listed in directories on the ebase web site. Details are available at <http://www.ebase.org>.
- ebasePro includes tools to assist in moving data from unmodified versions of ebaseClassic. ebasePro can be upgraded to the most recent version through software available on the ebase community site.
- Although some ebase customizations can be accomplished by intermediate users, significant customizations or changes to the core functionality will require input from a qualified ebase consultant.
- ebaseClassic support is available from community members on the ebase web site. ebaseClassic support services will be provided as long as the ebaseClassic community continues to support the platform in a sustainable manner.
- ebase bugs are public and are viewable at <http://bugzilla.groundspring.org>. The speed at which bugs are fixed depends on the severity of the bug, the nature of the fix required, and the resources available to fix it.
- Bug fixes are released as soon as resources allow, either as a software patches, workarounds, or through the version upgrade process.
- While ebasePro is open source and open to customizations, keep in mind that customizations done to core files will be overwritten by any subsequent ebase version upgrade or patch. Customizations done in external files and non-core modules can be preserved after ebase upgrades and patches.

ebase currently depends on FileMaker Pro and Microsoft Office

- ebase performance is optimized when used with FileMaker Pro (version 5.0, 5.5 or 6) operating on each user's computer.
- Many of the reports produced by ebase are in the form of Microsoft Word and Microsoft Excel merge documents. While the reports work out of the box, if you wish to modify ebase reports, you will need to be proficient in Microsoft Word and Microsoft Excel.
- The free, single-user runtime version is distributed as a trial demo for evaluation purposes. The runtime version of ebase cannot be used in multi-user mode. Further, using the runtime engine will restrict your ability to customize ebase.
- If more than one user needs simultaneous access to ebase on your computer network, each user needs a licensed copy of FileMaker Pro. In addition, the multi-user, client-server version of ebase requires that server data be hosted on a dedicated computer running FileMaker Server 5.5. This is a different program from FileMaker Pro software, and must be purchased separately.

The practice of using FileMaker Pro in peer-to-peer mode to share ebase files is unreliable, is strongly discouraged, and is not supported.

- ebase client-server installers are distributed to ebase community members only. However, skilled FileMaker Pro developers can use the documentation enclosed with the runtime version to create their own versions of the client-server installer.
- ebase is intended for use with datasets smaller than 50,000 contact records. ebase will slow significantly when this limit is approached or exceeded unless your hardware has

been upgraded to use the fastest available CPU's, storage media, memory, and your network is set up for maximum performance.

- ebase relies on the security built into FileMaker Pro. ebase is not "hacker proof." ebase should not be used to collect confidential data that must remain secure, (for example, credit card numbers and personally identifiable health records). The ebase permission architecture segregates data from users, but it does not provide data security. In other words, ebase will hide data from users defined with certain access privileges, but ebase does not provide a security architecture that makes it impervious to users who intend harm.

ebase software and support is developed and maintained by the ebase community

- ebase is evolutionary, open-source software that will grow in features, ease-of-use and technical support as the ebase community uses it, contributes improvements, and, together, expands the community of ebase users.
- ebase is not commercial, proprietary software, and does not follow a commercial software development model: the utility of ebase relies on the efforts of hundreds of individuals contributing their ideas and work to the ebase community. ebase code is made freely available to the ebase community to allow members to work together to develop the software and support mechanisms that best meet their individual needs.

ABOUT THIS MANUAL

This manual is intended for administrators of ebasePro and ebase "power users." It probably contains more information than the average user will need to know.

This manual explains how to install and configure ebase, create a coding system, import existing data to ebase, setup and use the built-in email system, customize ebase menus and metadata, administer ebase on a day to day basis, and to give you tips about where to get technical support. It is intended to give you an overview of how to set up and maintain ebase.

ebase is constantly evolving. People find new uses for various functions every day. It is strongly recommended that if you plan on using ebase in your organization, that you join the ebase community to keep abreast of new developments and new ways to use these tools.

While it is not mandatory to have system administration experience to administer a basic ebase database, a basic understanding of how to manage a computer system, a basic understanding of relational databases, and some FileMaker Pro knowledge will make it much easier to grasp what is happening.

Some features, such as creating custom finds, advanced search methods, customizing menus and creating new reports, will require that you know FileMaker. Other features-- such as using ebase to send email to lists of ebase users--require some knowledge of Internet email protocols and services.

Style conventions in this manual

We have used a few stylistic conventions to simplify the step-by-step directions in this manual.
References to:

- Main entries in the navigation bar (at the left of the screen) are in upper case. For example: ADMIN, CONTACTS.

- A greater-than symbol is used to identify submenu entries on the left navigation bar. For example:

CONTACTS>Add Contact

Directs you to click on the Add Contact submenu entry underneath the CONTACTS menu entry. (If you can't see the Add Contact submenu, click on CONTACTS to view it.)

- Navigation icons (at the bottom of the screen) are in title case with quote marks, followed by the word "icon", e.g., "Help" icon
- Buttons and underlined links (on screen or in dialogue boxes) are in quote marks, e.g., click "OK" or click "Add New Address" button or click "View complete list" link.

Other style conventions

It is occasionally necessary to refer to a specific process, relationship, layout (screen), field or script when providing details of how something should work. Typically, these entries are referred to in this manner:

Relationship: **CONTACTS>_kContactID\LOG_kContactID**

This notation indicates that a user should look at a relationship in the Contacts.200 file, called kContactID\LOG_kContactID.

Similarly, you may see things that look like this:

Field: **CONTACT:NameFirst**

This refers to the field called "NameFirst" in the Contact.200 file.

Many of the ebase naming and coding conventions seem odd at first, but they have been arrived at through a long trial and error process. More details about ebase naming and coding conventions can be found in the ebase Developers section of the manual.

This material in this manual requires Admin level access to ebase

You must be logged into ebasePro as an administrative user to follow most of the instructions in this manual (see the section on User Privileges for details on User login.)

To open ebase as an administrative user, you'll need to launch ebasePro (clicking on the ebase.200 file) and login with the following settings:

Username: **Admin**
Password: **Admin**

To open ebase in "developer" mode (to let you alter scripts, add modules, troubleshoot procedures), you should launch ebase using the DevLogin file (developers login), and enter "admin" as the developers password.

Chapter 1: [2] Help and technical support.....	1
The ebase community: Online technical support.....	1
Where to find ebase documentation.....	1
Bug report and feature requests	2
To use the ebase Bugzilla installation:.....	2

Chapter 1: [2] Help and technical support

The ebase community: Online technical support

ebasePro is community supported software. The main platform for ebasePro support is the ebase community website, located at: <http://www.ebase.org>.

The ebase community provides supplemental technical support materials to ebase members. To get access to supplemental support resources, you will need to join the ebase community at <http://www.ebase.org>.

ebase online community membership entitles you to:

- ebase email discussion lists and help forums—get fast help with your specific support questions. The online lists and help forums cover a wide variety of issues that ebase users face in their day-to-day work with ebase.
- Supplemental documentation and technical notes—find the most updated versions of the ebase manuals, plus additional technical documentation to help with the more arcane configuration and administrative features, (e.g. using ebase on a wide-area-network; tips on importing data, and more).
- Supplemental ebase software—members have access to older versions of ebase software and manuals; plus current enhanced versions of ebase: the multi-user version, the version upgraders, and much more.
- A searchable KnowledgeBase that includes help material indexed by subject area.
- The ebase member list—find other ebase users in your area.
- Trainer/consultant directory—locate expert assistance to help jumpstart your installation of ebase.
- Developers workshop—collaborate with others to develop add-on modules, custom reports, data entry screens, the sky's the limit!

Community membership underwrites the costs of providing online support for ebase. And, most importantly, your participation in the ebase community ensures your voice will be heard when evaluating requests for new features, support resources, and support services.

Where to find ebase documentation

Current versions of ebase manuals are available online at <http://www.ebase.org/manuals>. Supplemental documentation and archival versions of the manuals are available in the ebase community (membership required).

Bug report and feature requests

ebase is community created and community supported software. This means that ALL of the feature specification, testing, bug identification and documentation is done by users themselves, there is no paid staff.

The ebase community has organized itself into users, developers and a Technical Advisory Committee (charged with providing coding, documentation and quality control).

Probably the most important tool used by the ebase community to document bugs, bug fixes, and feature requests is “Bugzilla” tool, located at: <http://www.ebase.org/bug.lasso>. The ebase “Bugzilla” tool allows users to search through reported bugs to determine whether problems they encounter have been previously reported. In many cases, Bugzilla also contains a response or explanation from a developer who has examined the situation in detail. If the problem is actually an undocumented feature, or a result of improper configuration, the Bugzilla record will often indicate this. In addition, the ebase community uses Bugzilla to make requests for new features and functions.

Bugzilla works by having the user enter a “bug” record representing the situation they have encountered. The record is prioritized by the kind of bug or feature it is, what component of ebase it applies to, and how urgent the “fix” is needed. The ebase coding team then works down through the list of bugs and features based on their priority, and releases “developer builds” on a routine basis to the ebase developer community.

The Bugzilla tool can be very helpful in locating undocumented features or problems and can help you identify any workarounds that may be possible.

TO USE THE EBASE BUGZILLA INSTALLATION:

1. Go to ; <http://www.ebase.org/bug.lasso>
2. Create a login account (this is separate from your ebase community account);
3. Search for bugs matching the problem you are experiencing, or feature that you want.
4. Enter a report for the bug you are encountering.

Bugzilla captures your email address and will inform you of any progress made on addressing your issue.

Chapter 3 Administrator tips	1
Role of a database administrator (dba)	1
Other possible duties include:	3
Principles for maintaining “healthy” data.....	4
Data entry standards and style sheets	4
Building a handbook for your organization	5
yo! Yo! YO! BACK UP YOUR DATA!.....	7
Make your life easier by planning	8
Database Planning, Implementation, and Deployment Tasks	8
Final thoughts on planning and implementation.....	10
Training: The key to effective database management.....	11
Train Users on your Data Entry Standards	11
Train your Database Administrator on FileMaker.....	11
Look for ebase Training Opportunities	11
Setup an ebase Training Plan	11
USING THE EBASE COMMUNITY	12
Just because you don’t have prior experience as a Database Administrator doesn’t mean you can’t be a good one!.....	12
Problems, bug reporting, and getting features you need from ebase.....	13
Problems vs. new features	13

Chapter 3 Administrator tips

ROLE OF A DATABASE ADMINISTRATOR (DBA)

The database administrator is the primary caretaker for your organization’s database. As such, he/she has several responsibilities:

1. Develops and maintains the policies and data entry procedures for the database.

The DBA sets policy for how the database will be used. He/she also develops and maintains organizational procedures that explain how to use the database. These policies and procedures should be documented, in writing, and kept together in an organized file.

Some sample policies:

- Only development personnel can edit or make changes to major donor records
- The database will be used to keep giving history, activist information and event attendance

Some sample entry procedures:

- Membership renewals will be batched. Each batch will be assigned a batch code that will contain the date and the initials of the person who entered the batch
- Thank you letters will be run on Thursdays
- All edits to contact addresses will be done on Fridays

2. Implements database standards.

To ensure integrity of the data, the database administrator must maintain and communicate the database standards to everyone who uses the database. Standards ensure that data can be easily retrieved, easily edited and easily used for output such as labels, invitations, emails and other forms of communications.

The DBA should keep a written record of all the database standards. This will help ensure that standards are carried forward after the current DBA has left the organization.

See below for database standards and policy area suggestions. Further examples are also located in the ebase community web site.

3. Ensures data integrity by enforcing #1 & #2 above.

To ensure the integrity of the data, the database administrator should periodically check that the established data entry procedures and standards are being followed. This may require periodic reminders or small training sessions to re-train staff on data procedures. In addition, it is important that the administrator revisit the data policies once a year, in collaboration with other staff, to make sure the policies support the mission of the organization.

4. Makes sure that the data in the database is secure.

The database administrator is responsible for making sure that the data is secure. This is accomplished by establishing “user accounts” and passwords, and by creating user-specific “rights” that define who has access to the database, who can make changes and who can’t. The administrator should know exactly what kind of access level each user needs and assign their permissions accordingly. Unused accounts should be deleted or tagged as inactive.

5. Trains staff and volunteers.

The database administrator is responsible for training staff and volunteers on all database tasks that are related to that person's job. This includes: how to use the database; data entry procedures; the navigation tools; menu options; screen names and coding. Some sample items for training:

- How to enter a new contact (adhering to data standards)
- How to add an interest entry to a contact's record
- How to record a member payment

6. Supports staff using database.

The database administrator is responsible for on-demand support of staff after they are trained. This can include troubleshooting when they encounter problems in the database, or explaining a procedure when they don't understand it.

7. Develops entry codes and log names for the database.

The database administrator is responsible for developing, maintaining and communicating the coding system that will be used to classify log entries in the database.

The coding scheme is the foundation of ebase, so it is important that the administrator use a defined method and that she documents and communicates that method. The log name is what the user sees and selects in a drop-down list when they are adding a log entry or performing a find for entries. Most log names should be developed with staff to ensure ease of use.

The log name is just part of the log code, specifically the Code Title. To find out more about creating codes, see Chapter 8. Some sample log codes and log names are:

A Log Code for Tracking Renewals:

- Code Title: Renewal Nov 02
- Code Description: Mailing asking members to renew their memberships in November 2002
- Code class: Solicitation

A Log Code for Tracking Meeting Attendance:

- Code Title: Meeting Attendance, Issue 1,
- Code Description: Attended a meeting on issue 1
- Code class: Action

8. Performs backups and periodic restores to the database, supports crisis management of database.

The database administrator is responsible for performing or managing the system that performs daily backups of the database and for performing periodic test restores to make sure the backup system is working correctly. The administrator may also be responsible for addressing any data corruption issues or other crisis issues involving the database.

Other possible duties include:

Maintains or installs hardware / servers / internet connection.

The database administrator may also act as a network administrator, responsible for maintaining the database computer, the host computer, network servers, networking operating systems, and other network infrastructure devices as well as the internet connection to the organization's offices.

PRINCIPLES FOR MAINTAINING “HEALTHY” DATA

Your database is only as good as the data in it. This means that you have to develop solid data entry standards and then consistently follow them. Otherwise, you will have big problems later when you try to find or make use of your data.

Keeping your data healthy will allow you to seamlessly:

- Mail-merge without fear
- Identify and delete duplicates
- Easily sort or transform large amounts of data
- Use data in other computer programs

Though essential, healthy data is hard to come by. This is particularly true when more than one person enters data because it is a constant challenge to keep everyone on track. Perhaps you inherited a database from someone else who mismanaged it, or the data was entered by nineteen different volunteers, or (most commonly) you haven't had time to worry about entering the data correctly because you've been so busy trying to get that mailing out!

To ensure that your data is useful to you now and in the future, adhere to the principles of healthy data entry:

- Use separate fields for different pieces of information
- Make sure field names reflect the data they contain
- Put information into the field for which it was intended
- Enter data consistently, based on a style sheet for your organization

DATA ENTRY STANDARDS AND STYLE SHEETS

The best way to ensure the quality of your data is to develop a set of data entry standards. As your group's ebase administrator, you should create a data entry style sheet that details data entry standards for your organization and make sure everyone who enters data into ebase knows about it and USES it!

Some examples of topics you will want to cover in your style sheet are:

- Minimum Data Requirements (e.g. contact records must have first and last name and phone number -- at a minimum)
- Consistency (e.g. "Title" field is for a person's work title--Mayor or Director of Communications-- not for their generic occupation--lawyer, retired-- or for the name prefix -- Mr, Dr.)
- Data Format (e.g. always Street, Avenue, Lane--not St, Ave, Ln.)
- Other Standards
- Log entry list (i.e. what log entries to use for specific purposes)

(Sample data entry standards are available online at the ebase community site).

Steps:

1. Meet with staff members to discuss and decide upon data entry requirements and standards for your organization.
2. Codify (that's right, make it law) your decisions in a document that users can refer to when they're working in ebase. Use the sample "Data Entry Standards for Users" in Step 5 below as a starting point.
3. Distribute your Data Entry Standards to all users with much fanfare. This will help ensure that everyone uses them.
4. Make sure all users use the agreed upon data entry standards. A bit of spot-checking from time to time wouldn't hurt!
5. Sample Data Entry Standards:

A. *Minimum Data Requirements.*

All contact records must include the following information at a minimum:

- prefix
- first name
- last name
- title (if applicable)
- organization name (if applicable)
- address (street, suite if applicable, city, state, country, postal code)
- phone number using dashes
- email address

B. *Consistency.* Consistency refers to entering the same type of information in a unique field.

- Title field is used to record a work-related title that should be placed on the address label. It is not to be used for generic occupations (e.g. lawyer, retired, doctor) nor is it to be used for the name prefix (e.g. Ms., Dr., Mr.).

C. *Data Format*

- Use standard prefix and suffix abbreviations: Mr., Ms., Mrs., Esq., MD, JD, Jr. and roman numerals, i.e., Mr. John Bindle, III, Esq.
- Don't abbreviate names unless the information came directly from the contact, e.g., J.R. Ewing.
- Don't abbreviate street address information, e.g., enter "Avenue" not "Ave."
- Include suite or unit numbers with the street name in the Delivery Address field.
- Abbreviate state names using the U.S. standard two-letter abbreviations, e.g., CA for California.
- The URL should include the internet protocol prefix, e.g.: http://.

D. *Other Standards:*

- The first address entered for a new contact is automatically designated as the primary address. Unless another address is specifically tagged as primary, the first address entered will remain primary and will print out on labels, merge files, etc.

BUILDING A HANDBOOK FOR YOUR ORGANIZATION

Why create a handbook for your organization's database practices? The ebasePro manual shows you how ebase works and gives tips on how to personalize it for your organization, but it doesn't and can't be an expert on your organization's business practices. While ebase requires you to make decisions on how you want ebase to manage the important relationships for your organization, it doesn't document those decisions for you.

You need to document your policy decisions. Why? The decisions you make while implementing and using ebase can build on each other but they may also conflict with each other. Keeping track of these decisions in one place will help alleviate conflicts in your management policies and will allow you to build a coherent structure for tracking the growth of your organization. Plus, the clearer your instructions, the easier it will be for the next DBA to continue appropriate management of the database: The time, energy and hard work that you put into developing a solid database will live on long after you are gone.

Start by writing a paragraph describing the purpose and general criteria for your major work areas. Follow this summary with step-by-step instructions.

Example of general work areas and questions to answer:

1. GENERAL BUSINESS PRACTICES

Donations:

- a. When will data entry be done and by whom?
- b. When will deposits be made?
- c. When will thank you letters be mailed?
- d. How will year-end contributions that arrive after Dec. 31st be handled?

General administration:

What to do when...

- a. A member dies
- b. The spouse of a family member dies
- c. A family member divorces
- d. An individual expands to a family
- e. A member asks to be removed from the list
- f. A member asks not to receive "so many mailings"
- g. A solicited person asks "to be removed from the list"

How to...

- a. Track board members
- b. Track committee membership
- c. Track complimentary memberships, newsletters, etc
- d. Track interest (volunteer, workshop, etc.)

Other...

- a. What is your policy on trading and/or selling membership data?
- b. How many times will you solicit a prospect before deleting them from list?

2. MEMBERSHIP

- a. What constitutes a member? Is it a donation amount? A level of expertise? Are there complimentary members? What are the benefits of membership? How should they be tracked?
- b. Are there categories of membership to track?
- c. How many reminder notices do you mail? What is their schedule?

3. GENERAL FUND DONATIONS

- a. What are the basic categories of donations you receive?
- b. Does your organization have separate funds or restricted funds that you need to track separately?
- c. What are your policies on tributes or memorials? How will you acknowledge them? Will the donor automatically become a member or is there another category for them?

4. SPECIAL DONATIONS

- a. What about stocks?
- b. What about in-kind donations?
- c. What are your policies about volunteer time (regular and specialist)?
- d. Do you receive grants?
- e. How do you wish to track business donations?
- f. What about major donors?
- g. How will you track pledges?
- h. What about deferred gifts?

5. THANK YOUS

- a. What are the basic thank you letters your organization sends out? What are they composed of: a letter on letterhead or special paper? A postcard? A welcome packet which consists of what?
- b. Which ebase Report do you generally use to export data for bulk thank yous?
- c. Do you use the Receipt feature of the payment log entry: always, never, for certain types of donations?
- d. How do you acknowledge a “gift” from tribute donors?
- e. What does the gift acknowledgement to the recipient look like?
- f. Are there levels of acknowledgements?

These are just a few of the many issues that could be covered by your data management decisions document.

If it's not documented, it didn't happen.

It's much easier to start documenting your decisions as you make them, than to try to hunt up histories after the fact. It will make the real work of making those decisions seem real to people who don't understand what you do. Those people might be your colleagues and co-workers, they might be your funders or, they might be your supervisors. A key indicator of professionalism is documentation and, as an emerging DBA, it needs to be high on your list of action priorities.

YO! YO! YO! BACK UP YOUR DATA!

It will be repeated over and over in this manual and on the ebase website: Backup your ebase data regularly. Meaning, every day you enter new data into ebase or make changes to pre-existing data: BACK IT UP.

All computers crash and data can be lost in a fascinating and astonishing number of ways.

If you don't backup your ebase data, sooner or later you are going to lose some important information that will cost your organization money and time to reinvent or work around.

The ebase community has heard many stories of organizations losing weeks or months of work (in some cases their entire ebase database) because of not backing up. The cost (in time, media and hardware) of performing regular backups is MINUSCULE compared to the cost of reconstructing your database from hard copy or doing without key information because it is lost forever.

The ideal way of backing up is to make a copy of the ebase folder—files and all—and store it in a safe place. To be safe, the copy should be kept in another location. **You should not make a copy on the same computer that the live database is on because, if that computer crashes, the copy you made will be of no use to you.**

You should also maintain a routine backup schedule and make sure that duty is carried out whether by you or someone else. Backup your data at least once a week, or every time you (or someone on your staff) enters or changes data in ebase. It's best to schedule it at a convenient and easy-to-remember time, say after the weekly staff meeting or before going home for the night.

A good rule-of-thumb for determining if you should back up now or put it off until later: If it will take you less time to back up your data files than it will probably take you to reconstruct and reenter the data that has been entered since the last time you backed up—it's time to back up!

ALWAYS back up prior to making major changes to your system (e.g. changing passwords, importing files, using the Replace command, etc.).

You should also keep an archival version of ebase – BEFORE YOU START ENTERING DATA – just in case the worst happens and you have to move data back into a clean copy of ebase.

You should keep backup files as far back as you can afford. Don't just have one backup file and overwrite it every day. If there is a problem that is not noticed until a week after it was first created, you will need to revert to old backups because your most recent backup will be useless.

In addition to using digital backup methods, it is important to keep the original hard copy files if data is being entered manually. This way, you can refer to the originals if the digital files become inaccessible (computers crash), or if the accuracy of the data entered into ebase comes into question (people make typos). Hard copy is also useful for legal purposes (lawyers love it). It's simple enough to keep a folder that contains your source entry material for the past month.

For even more information, visit the TechSoup web site at <http://www.techsoup.org>.

Just backup your data, ok?

MAKE YOUR LIFE EASIER BY PLANNING

Many first-time, or “accidental” DBA’s (people thrust into the position of being a database administrator without background or training) are surprised by the level of detail and breadth of knowledge they need to implement a database. Further, it’s very easy to underestimate the effort of planning the installation, configuring the database, deploying it and troubleshooting the problems that arise after a new database installation.

So, to give a better perspective on the tasks ahead of you, we’ve included an outline of the typical steps in a new database installation project. You should keep your old database system in place while you’re installing and configuring your new database system (to make sure you can continue to do your work if you run into unexpected snags in your implementation plan).

CAUTION: We do not recommend using a new, untested system – ebase or otherwise – for running your organization: it’s a recipe for disaster and guarantees bad feelings about the project. Make sure you can continue to do your work while you implement any new system.

Database Planning, Implementation, and Deployment Tasks

Define Project Roles

Project Director

Accountable to the executive of the organization (ED, Board, Mgmt team), with the authority to provide resources needed for the project. This person is responsible for clearly defining the organization’s needs and providing the resources necessary to meet those needs. Typically, this role is fulfilled by the Database Administrator’s supervisor.

Project Lead

Responsible for ensuring that project plans are detailed and achievable within resource limitations; that the project stays within budget; that timelines are met; that technical quality is maintained; that the project is documented and the director is satisfied. Typically, this role is fulfilled by a DBA.

Technical support

On-the-ground education, training, assessment, evaluation and troubleshooting. Typically this role is filled by someone in an IT department or an outside consultant.

Gather data, forms and reports corresponding with anticipated scope of work

Project lead collects:

- Paper Forms
- Examples of current mailing label(s)
- Response cards
- Change of address cards
- Information request forms
- Entry forms
- Frequently used Reports
- Exiting databases
- Exported text file from existing database including ALL contact information (to check size, cleanliness, and difficulty getting data out of the current application)
- Exported text file from the email list manager (for example Outlook or Eudora)

“Scope of Work” negotiated

Project lead lays out timelines, commitments and deliverables for:

- Planning
- Data gathering
- Import/conversion
- Training
- Testing
- Running a “test” project with parallel data entry
- Integrating data entered during parallel data entry process
- More Training
- Going live!

Planning and infrastructure deployment

Plan the installation

- Address any platform, network or internet service issues (SMTP/POP3, DNS). Contact your ISP and/or your in-house technology provider for further information.
- If required (most organizations don't need to), install terminal services. Again, you may need assistance.
- Unearth and document existing data collection, reporting, backup and archival practices and procedures.
- Get an on-staff “data quality champion” to gather existing data sources and determine what data should be migrated (imported) into the new system.
- Define your coding structure
- Create code set, test code set. (See Chapter 8 for details.)
- Follow instructions in the ebase manual (Chapter 5) to configure ebase: Setup user accounts and customize simple interface

Define a small target project to test the initial database implementation

- Create a project that will test the initial implementation of the database.
- Pick a campaign,

- Outline the steps you need to run the campaign (e.g.: membership renewal, an event, a publication launch, a newsletter cycle),
- Determine who is responsible for what part of the test project
- Set objective goals for success before you start. You'll need something against which to measure the results of your test.

Gather your data

Catalog data/records that will be imported during the project.

Convert data

Test the import

Merge data to intermediate file. Identify potential long-term import issues. Estimate how much time it will take to do the final conversion

Import data

- Import data, test basic functions.
- Archive old data.

Install new file(s), test.

Begin staff training for staff involved in the test project.

Initiate the “test” project.

Tech support resource stands by ready to answer questions.

Evaluate the results of the test.

Make any changes that arise from the test experience and determine whether or not it's time to go live.

After successful completion – Take ebase live.

- Check to make sure all recent data entry has been merged into ebase
- Old system turned off, ebase is now official platform
- Tech support and DBA is on-call for troubleshooting

Final thoughts on planning and implementation

As you can see from the task outline, a rational transition to a new database involves lots of steps and significant effort.

Depending on your organization's circumstances, you can collapse steps and roles, but you shouldn't skip them. You will encounter problems further down the road that are harder to address than if you took a measured approach to implementing your database.

Often this is a “hard sell” in fast moving nonprofits. A lot of groups have gotten by “just fine” without any planning, why should they start now?

It will fall on the Database Administrator's shoulders to make the pitch to your management team for doing it right. After all, who wants to do all this stuff again in the near future after you've found that by skipping steps, you've skipped over issues that stop your organization in its tracks a little further down the road.

This is a big job, and a significant one for your organization. One way to think about the importance of a good database implementation is to think about the key resources that your organization relies on to survive.

It is vital that your board and management team understand that a system that manages the MOST IMPORTANT asset of any nonprofit organization – the relationships with people who believe in and support the mission – must be managed by someone who is properly trained and resourced to carry out this role.

Most of the people involved in ebase started their career as “accidental” Database Administrators who learned the ins and outs of database implementation through experience. (What’s the definition of experience? “Knowledge gained through mistakes you’ve survived.”) Accidental DBAs need training and support so that they are not forced to repeat common mistakes.

The planning steps outlined above can help significantly reduce the problems you’ll encounter with your database after it is implemented. You’ll have a better sense of your database’s capabilities and weaknesses, and you’ll have a renewed respect for the amount of effort it takes to keep your data clean and safe. Most importantly, you’ll be able to create a degree of predictability in your daily tasks that relate to your database, so you can accurately plan to meet new deadlines or add new functions.

TRAINING: THE KEY TO EFFECTIVE DATABASE MANAGEMENT

Train Users on your Data Entry Standards

Ideally, every staff member, volunteer or intern who uses ebase needs to have at least a basic knowledge of how ebase works. ebase users must be familiar with your data entry standards and code set.

Train your Database Administrator on FileMaker

Most users of ebase do not need to have extensive knowledge of FileMaker, but some basic knowledge is helpful. The Database Administrator must have knowledge of FileMaker databases, and if you are using a client-server version of ebase, the Database Administrator must have knowledge of setting up FileMaker Server and connecting to it with client machines.

Look for ebase Training Opportunities

There is a calendar of current training opportunities, as well as a listing of consultants and trainers at <http://www.ebase.org> You can also find out about ebase user groups in your area and ask questions of other users and FileMaker developers by joining the ebase email support forums at <http://www.ebase.org>.

Setup an ebase Training Plan

You may want to start to develop an organizational training plan that includes:

1. Orientation for new users (including volunteers):
 - Basic navigation
 - Data entry standards
 - How to query the database
 - How to contact the Database Administrator for troubleshooting
 - What to do in the event of a database crash

2. Special task training for occasional users. For example, for volunteers who do data entry during a phone bank or major campaign push.
3. Repeat training to cover what didn't sink-in the first time around. The Database Administrator may identify the need for this based on spot-checking the quality of the data being entered and whether staff are actually using the database as intended. Is data entered consistently with the data entry standards? Do staff maintain individual databases (such as spreadsheets, contact files) instead of using the organizational database?
4. Ongoing or advanced training as staff identify new information needs. This is also the way to develop an Assistant Database Administrator, who can help with user questions and troubleshooting in the Database Administrator's absence.

USING THE EBASE COMMUNITY

Just because you don't have prior experience as a Database Administrator doesn't mean you can't be a good one!

ebase.org operates on the theory that nonprofit users can support each other's use of technology more effectively and economically than relying on commercial vendors for support.

This is where ebase community membership comes in.

Your annual ebase membership contribution gives you access to the ebase community website, which provides:

- ebase support through email lists and online forums
- A searchable FAQ and technical notes database
- Access to the ebase library: supplemental technical documentation to help your organization adopt and use ebase
- Access to training materials and demos
- ebase software updates and bug fixes

Visitors may look at most areas on the ebase web site for general information. However, members have access to specific help through asking questions and the How To library full of tips and tricks.

Membership in the ebase community is low-cost and easy to start. Join at <http://www.ebase.org/membership>.

Additional benefits include:

- The opportunity to help yourself by helping others. Often answering someone else's question helps you learn!
- Your participation through membership contributions and online involvement provide critical keys to improving one of your organization's valuable tools – ebase.

Four principles that underlie the ebase community

The ebase community is established on the principle that people are continually learning to do their jobs better. There's a wealth of knowledge and practical skills embodied by members of the ebase community, and they're willing to share their experiences with you, as long as you are willing to enter into a good faith conversation.

Technology Transparency is the idea that information technology should be a tool whose suitability, benefit, and ease of use makes its employment second nature (like the telephone).

Open Systems is an approach to technology innovation that emphasizes continuous contribution by many authors, with the results owned by no one, and by everyone.

Fair Exchange is the principle that those who receive the benefit of another's technology should in some fashion reciprocate, propelling still more forward movement.

Fair Compensation is the idea that those who bring their time and talents to the cause of empowering nonprofits with technology deserve due recognition, financial and otherwise.

The ebase community is firmly dedicated to these principles and encourages all of its participants to share what they know in the spirit of these principles. This has created a unique and dedicated group of people committed to helping other nonprofit database administrators improve their knowledge of what it takes to be a good system administrator.

Being part of the ebase community enables you to learn and help others learn about how to do their jobs better.

PROBLEMS, BUG REPORTING, AND GETTING FEATURES YOU NEED FROM EBASE

The ebase Bugzilla site has become the de facto task list for ebase. The ebase community has grown to depend on it to manage the process of identifying ebase bugs, and to specify new ebase functionality.

ebase users and developers are encouraged to document the problems they have with ebase in the form of bug reports and feature requests at this website. These reports lead directly to changes within ebase that make it easier for everyone to use.

Problems vs. new features

Generally, a problem is discovered when you expect the software to do one thing, but it does something else. This is called a bug.

A problem is different than not understanding how to use a feature—that issue is remedied by training.

A new feature or "enhancement" is a function that either improves an existing function, process, layout, or report or, it can be a proposal that suggests a new process/function/report.

Bug reporting

The most important thing to note when reporting a bug is that you must provide enough information to make it possible for someone else to replicate the exact problem. If you think about it: how can someone fix something that they cannot see?

Getting specific:

- What version are you using?
- What data are you using?
- What is the sequence of buttons you pushed, dialogues you received and responses you made that lead to the bug?
- Can someone follow your instructions and see the bug themselves?

The ebase community frequently sees bugs that are specific to particular Operating Systems, versions or data-sets. Many of the processes in ebase invoke multiple other processes (permission, navigation, dialog presentation, variable passing, result presentation) and any one of these processes might contain a problem that leads to a bug.

While writing a bug report, it is very important to describe in enough detail so that a busy (and easily befuddled) coder trying to address bugs quickly can replicate the problem and therefore get started on identifying the solution.

If you're reporting a bug that requires a "find" for instance, please indicate the type of data you are trying to find (e.g. Date Posted, Contact Name), including the exact nature of the data (e.g. "Bob" or "2/23/07...2/30/07") because sometimes the problem is data-related (e.g. 2/30/07 doesn't exist).

To report a bug: Go to <http://www.ebase.org> and look under Support. A link will take you to Bugzilla.

Feature request

Feature requests can often be difficult to communicate effectively, especially if they conflict with existing features or processes.

For example, saying something like, "DatePosted needs to come after ContactName in the BasicInfo report" is easy to handle. However, "reports need to be easier to use," is too vague and needs to contain more specific information.

Here's how new features are added to ebase:

1. Someone requests a new feature, or submits a bug that is actually a request for a new feature.
2. The coding team, or the ebase Technical Advisory Committee (a.k.a. the TAC – a group of ebase developers volunteering to serve in this capacity) evaluates the report and if needed, makes a request for clarification.
3. The ebase Technical Advisory Committee prioritizes the feature requests.

The release of ebasePro marks the first time ebase has been primarily user and developer driven. New feature decisions are very interactive because the person who made the initial report has to be willing to specify it in enough detail so that someone else can make it work.

This is often accomplished through a back-and-forth conversation to clarify exactly what is being asked and minimize the risk of coding missteps (see: http://www.infoworld.com/article/03/10/24/42OPconnection_1.html for a more complete discussion of this type of software development issue).

To suggest an enhancement: Go to <http://www.ebase.org> and look under Support. A link will take you to Bugzilla.

Chapter 4 Installing ebasePro	1
Installation Types	1
Single-User Runtime	1
Single-User FileMaker Pro	1
client-server.....	1
Obtaining ebase	2
Distribution Packages.....	2
Download.....	2
Single-User Installation	2
Client-server Installation	4
Benefits of using Filemaker server.....	4
client requirements	5
server requirements	5
Filemaker server setup.....	6
ebase client-server file installation:	6
POSSIBLE COMPLICATIONS IN A CLIENT-SERVER ENVIRONMENT	11
Upgrading your version of ebasePro	12
Other software and information available to ebase community members.....	12

Chapter 4 Installing ebasePro

INSTALLATION TYPES

Single-User Runtime

EbasePro is provided with a “runtime” version of FileMaker that will allow single-user operation of ebase, but will not allow users to make changes to ebase files, scripts, screen displays, etc. With this type of installation, it is typical that only a single person uses ebase, or that all ebase users access the database from a single computer where it is installed.

Single-User FileMaker Pro

There are some advantages to making use of a full copy of FileMaker Pro rather than using the runtime version of FileMaker provided with ebase. This approach allows the user to get “under the hood” and obtain developer-type access to make modifications.

With this type of installation, it is typical that only a single person uses ebase, or that all ebase users access ebase from a single computer where it is installed.

client-server

ebasePro can be installed to allow multiple simultaneous users to access data over a local area network. All users have access to the same data – modifications or additions made by one person are available to all.

This type of installation requires some files to be located on a “server” computer (running FileMaker Server software), and other files to “client” computers (where full versions of FileMaker Pro are installed). Database users access data through the client computers; the clients are allowed admittance to the server computer (where the data is actually located). In other words, the server “hosts” the client via the FileMaker Server program.

OBTAINING EBASE

Distribution Packages

ebase is distributed in two forms:

1. **An “archive” file** (either in .zip or .sit format, depending on whether you have a Windows machine or a Mac). The archive distributions are the store house; they contain the basic ebase files and supplemental software. You may have to manually copy or move some of these files to their final locations on your computer.
2. **A pre-programmed installer** that attempts to put the various pieces of software needed by ebase into the appropriate places on your computer. (As of May,2006, the only available installer is the one designed for the Windows version of ebase. Traditionally, additional installers have been available for installation of: client-server implementations of ebase, Macintosh implementations, automatic upgrade of earlier versions of ebase to the current verion. Check the ebase Web site to determine whether Macintosh installers are available.)

Archival file distributions are released more frequently. As a result, the archive file distributions often provide more recent versions of ebase.

Download

To download, go to the ebase Web site: <http://www.ebase.org/>. Follow the “download” links. You will be asked for your email address and for some simple additional information such as your name, the subject area covered by your organization, etc. Once this information is submitted, you will be sent an email at the address you provided. The email will contain the final link to the download area and an account name and password for you to use in downloading ebase. You may choose to download a version of ebase for either Windows or Macintosh operating system. Download should be very fast on a high speed connection, but can take 20 to 40 minutes on a dialup connection.

You do not need a copy of FileMaker Pro to use the single user runtime version of ebase. The basic installer files are between 10 and 20 megabytes in size. Plan accordingly.

Ebase provides basic help within the application itself. Copies of the documentation, such as the Administrator’s Manual, are available at the Web site, but are not provided as a part of the standard installation process. The installer provides internet links to the documentation. The Administrator’s Manual takes about an additional 7-8 megabytes of space.

When you download ebase, your computer will ask you where to save the file. Keep track of the location you choose.

SINGLE-USER INSTALLATION

Installation using the Archive files

To use the archive files, you’ll need software that can open ebase files shipped in “.zip” or “.sit” formats. The most popular packages are WinZip (for Windows OS), and Stuffit (for the Mac). A number of freeware or shareware alternatives are also available.

The basic difference between the two formats is that .zip strips binary file information from the original files. This doesn’t make any difference on a Windows machine. .sit files retain binary file information, making it more suitable for the Macintosh platform.

The installation process for both kinds of files is the same:

1. Make sure you have the appropriate archival file software.
2. Launch the archive file. Your computer should recognize which software is supposed to extract the ebase files from the archive. If not, follow the instructions provided by your archival software.
3. Save the resulting ebase files somewhere on your computer, and remember where you put them. The most common location is inside your Programs folder (Windows) or your Applications folder (Mac). By default, the files are placed inside a folder called "ebasePro", so if you forget where you placed them, search your computer for a folder named "ebasePro."
4. Open the ebase folder. Inside you'll see all the components necessary to run ebase using the ebase runtime engine instead of FileMaker Pro.
5. If you prefer running ebasePro using your own copy of FileMaker Pro instead of the runtime engine, keep reading - you'll need to make some additions to the collection of "plugin" files being used by your copy of FileMaker Pro.

Special Installation instructions if you already have FileMaker Pro

The ebase archive files contain everything you need to run ebase, even if you don't have a copy of FileMaker. However, if you have a copy of FileMaker V5.5 or V6 and you want to run ebase with it, you'll have to do a few extra steps:

Install the plugins

Ebase requires the use several plugin files to enhance the capabilities of FileMaker Pro:

- **POP3it** turns FileMaker Pro into an email client
- **SMTPit** lets FileMaker Pro send email using the SMTP protocol
- **Dialog** extends FileMaker Pro's dialog box functions
- **Window** allows FileMaker Pro to dynamically set application window sizes and locations.

These plugins are proprietary - the ebase project purchased licenses from the plugin developers allowing the plugins to be distributed with ebase. The licenses prohibit these plugins from being used with other FileMaker Pro applications unless new licenses are purchased.

To install the plugins:

Windows:

1. Make sure FileMaker is closed.
2. Locate the FileMaker Pro application on your computer. Inside its folder (usually called "FileMaker Pro"), you'll see a folder called "System."
3. Open the System folder.
4. Go to your ebasePro folder. Inside that folder you'll see another folder called, "System".
5. Copy or move the POP3it, SMTPit, Dialog and Window plugin files from the ebasePro/System folder to your FileMaker Pro/Systems folder. Do not move the folder itself, just the files located within the folder.
6. Launch FileMaker - the plugins install themselves automatically.

Macintosh:

1. Make sure FileMaker is closed.
2. Locate the FileMaker Pro application on your computer. Inside its folder (usually called "FileMaker Pro"), you'll see a folder called "Extensions."
3. Open the Extensions folder.
4. Go to your ebasePro folder. Inside that folder you'll see another folder called, "Extensions".

5. Copy or move the POP3it, SMTPit, Dialog and Window plugin files from the ebasePro:System folder to your FileMaker Pro:Extensions folder. Do not move the folder itself, just the files located within the folder.
6. Launch FileMaker - the plugins install themselves automatically.

Information explaining how FileMaker uses plugins is available on the FileMaker Web site and in various help sites on the internet. To see more information:

<http://www.google.com/search?q=filemaker+plugins&ie=UTF-8&oe=UTF-8>

Installation using an installer

When you are ready to install ebase, launch the ebase installer file that you downloaded and follow the instructions presented to you.

When you open the database for the first time, use the username "admin" and password "admin" to log in using the default administrator account (see the next section in this manual for details on configuration process).

CLIENT-SERVER INSTALLATION

Benefits of using Filemaker server

FileMaker Server allows you to:

- host ebase files for up to 250 simultaneous users.
- much more effective than FileMaker Pro at preventing bad user sessions or network interruptions from corrupting the hosted data.
- allows you to specify automatic backup schedules that can be performed as users continue to work with your database.
- You don't have to worry about running out of room for other FileMaker database uses.
For a client-server installation, ebase puts about 15 files on the server: FileMaker Server provides the capacity to host at least five times that many databases, leaving plenty of capacity for hosting additional FileMaker databases.

During ebase's own production, the ebase Filemaker Pro server backs up the databases EVERY HOUR, then keeps 5 days, 4 weeks, and one month worth of backup archives--automatically. This provides important insurance against disaster, while requiring little attention from the database administrator and causing practically no disturbance to database workers.

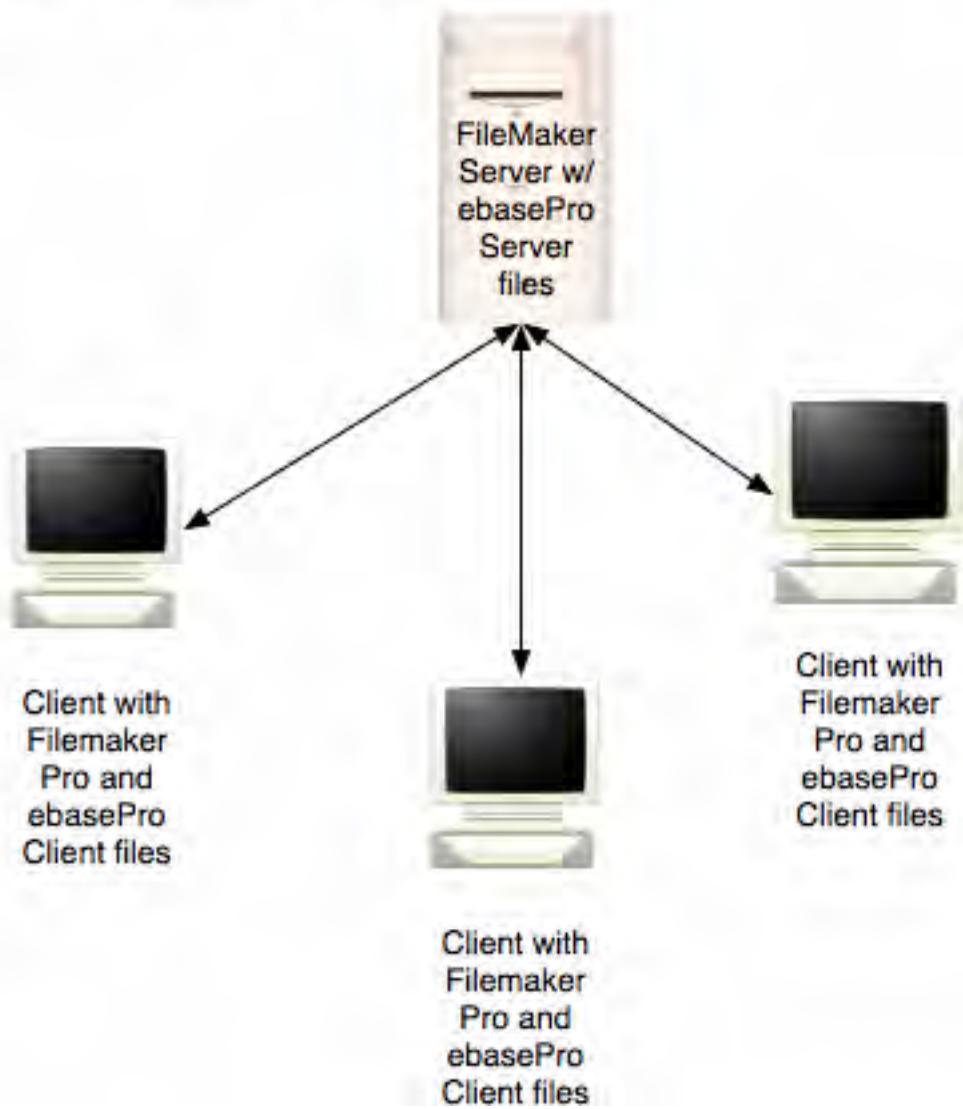
CAUTION: Although FileMaker Pro applications can typically be run in "peer-to-peer" mode using copies of FileMaker Pro at both client and server ends of a connection, our own experience and testing shows this approach is not reliable with ebasPro, and is not recommended. If you need simultaneous multiple-user access to ebase, you should obtain a copy of FileMaker Server.

How does this work?

Client-server use of ebase requires some files (which temporarily store data during a user's work session) to be located on user's client workstations, while other files (which actually store the data that's shared between users) must be located on a database server (see the illustration below). The list of client and server files is found in the Developer section of this manual.

As of May, 2006, client-server installers are not available to automate the placement of files into correct client and server locations. Check future versions of the ebase documentation, the ebase Web site, and the archives of the ebasePro mailing lists for information about the future availability of client-server installers.

ebasePro Client-Server



client requirements

Each client workstation must have a full, installed copy of FileMaker Pro V5.5 or later and must meet the standard system requirements for running ebase in single-user mode: Both Windows and Mac versions of ebase require TCP/IP and a working Internet connection for Internet related features. Access to POP and SMTP servers is required to make use of ebase-based email services.

server requirements

The computer that will be the server for the database must have an installed copy of FileMaker Server 5.5 (or a later release of FileMaker Server within the V5 series) and must have the same

minimum requirements as client machines. An installed copy of FileMaker Pro is not necessary. Additional memory and higher hard drive speeds are a benefit. CPU speed is less important. Additional server memory will be needed with larger numbers of files being hosted and with larger numbers of clients being served. The database worker's perception of speed depends on the speed of both the client workstations and the server machine.

A minimum of 50 MB of free space will be required on a computer running the Windows operating system.. Average users should allow at least 60 MB to allow space for their data. (Some ebaseClassic installations have grown to over 300mb.)

Filemaker server setup

To install ebase for use on a client-server network you must first set up your copy of FileMaker Server to recognize and serve ebase files.

FileMaker Server Settings

FileMaker Server can be configured through a variety of interfaces, depending on your operating system. In addition, you can have the server running on one operating system, while clients accessing the server can be running on other operating systems.

However, regardless of the version of the operating system you are using, FileMaker Server has to be set up with specific parameters to host ebase files.

1. FileMaker Server must be set to host FileMaker databases that are set to "single-user" status.
2. FileMaker Server must be set to host files with ".200" extensions.
3. FileMaker Server must use the same network protocols as your clients (i.e. TCP/IP or AppleTalk).

Each version of FileMaker Server sets these parameters with different methods - read the documentation provided with FileMaker Server to determine how to set them on your own copy of FileMaker Server. For the purposes of this document, we will assume you already have FileMaker Server set up and running, and capable of serving up FileMaker Pro files that have a ".200" file extension. (See the section in the FileMaker Server documentation on "Enabling a Runtime Version.")

ebase client-server file installation:

(As of May, 2006, client and server installers that automate many of the steps in client-server installation are not available. Please check future versions of this documentation, the ebase Web site, and the ebase mailing lists for future availability of installers.)

The steps outlined here will convert a single-user copy of ebase V2.xx to a ebase client installation accessing data held in a server version of ebase located on another computer on the same local area network.

PRECONDITIONS

The following conditions should be satisfied before the procedure is started:

1. A single-user version of ebase is available that holds the data to be used in ebase client-server operations.
Programmed/automated clean-up of data is easier in a single-user ebase installation than using a client/server installation. If you are still working on transferring data from your previous database to ebase, it may be best to put off the establishment of client-server environment.

2. Administrator-type access to the computer running FileMaker Server will be required.
Search out the appropriate account/password information.
3. The computer where the loaded copy of ebase files is located should meet the following conditions:
 - a. The person following these instructions must have administrator-type access to this computer.
 - b. A copy of FileMaker Pro should already be installed.
Use of the runtime version of FileMaker Pro will not suffice for ebase client operation - a full version of FileMaker Pro is required on the client computer.
The computer to be used as the ebase server must be located on the same computer local area network.
Often this will be the same computer used to check results of data transfer and other ebase customization activities.
4. Archiving software such as WinZip, PKZip, Stuffit, 7-Zip, Info-Zip must be installed on at least one computer to be used with ebase.

Use of trial versions of WinZip can be completely acceptable, as these generally allow about 60 days of use. Alternatively, open source software such as 7-Zip or Info-Zip may be used.

SINGLE-USER/CLIENT-SERVER CONVERSION STEPS

1. Identify the copy of ebase files that contain the data to be used for client-server operation. (This will be called the “ebase source” from here forward in these instructions.) It is a good idea to write down the complete path to the folder used by THIS copy of ebase – you may need to know this value at several points during this procedure.
2. Use archiving software (like WinZip, etc.) to create a new archive file. Locate the new archive file within the ebase source folder. Place copies of all ".fp5" and ".200" files found in the ebase source folder into that archive file.
The new archive file provides a copy of all source data in case of an error during the process outlined here.
It may be wise to give the newly created archive file a very descriptive name like "ebase_backup_single_user_YYYY_MM_DD.zip", etc.
3. Perform a thorough search for extra copies of ebase files.
Any copies of ebase files that are *not* the data source identified in step 1 are extra copies. Search for copies of one of the main ebase files, like "ebase.200" to find copies of ebase.
Be sure to search *all* disk locations on computers that have been used for ebase work so far. It is also wise to search all readily accessible locations on the local area network of computers.
4. For each extra copy of ebase files, perform the following steps
 - a. Record the location of the folder where the copy is located
This information will be needed during later clean-up.
 - b. Using archiving software (like WinZip, Stuffit, etc.), create an archive file in this folder.
It is wise to provide a clear name for the archive, such as "ebase_copy_backup_2005_01_12.zip". Even better would be a name that indicates WHICH copy of ebase is contained in the archive file ("ebase_copy_alice_my_documents_2005_01_12.zip", "ebase_copy_b_2005_01_12.zip", etc).
 - c. Place copies of all ebase files with ".fp5" and ".200" extensions in the newly created archive file.
 - d. Open the archive file and verify that it contains copies of all ".fp5" and ".200" files from the folder. Then close the archive file.
 - e. Delete the unarchived copies of ".fp5" and ".200" files from the folder.

At the end of this process you should have copies of the ".fp5" and ".200" files from this folder in an archive file (e.g. "zip" file, etc.) but there should be NO copies remaining *outside* that archive file.

5. Verify that all extra copies of ebase have been archived and deleted.
6. On the server computer, create a subfolder for ebase files.
On a Windows operating system, this new folder should be named "ebase" and should be located within the "Program Files/FileMaker/FileMaker Server" folder.
On a Macintosh operating system, this new folder should be named "ebase" and should be located with the "FileMaker Server" folder.
NOTE: The name of this folder may not be *exactly* as stated above.
7. Move copies of the following files from the ebase source to the newly created "ebase" folder on the server computer:
ebase 2.20 server Files
28 Files
 - CodeGenerator.200
 - ContactLocations.200
 - Contacts.200
 - ContactsReports.200
 - ebase.200
 - EmailArchive.200
 - EnhancedData.200
 - ImportCodes.200
 - ImportContactLoc.200
 - ImportContacts.200
 - ImportExport.200
 - ImportLocations.200
 - ImportLog.200
 - ImportNamesV1.200
 - ImportRelatedV1.200
 - ImportSourceV1.200
 - Links.200
 - Locations.200
 - Log.200
 - LogReports.200
 - Lokey.200
 - Main.200
 - Menus.200
 - Navigator.200
 - NavigatorCustom.200
 - Reports.200
 - VLists.200
- After the move, verify that these files are NOT present in the ebase source folder. They should be located ONLY on the server computer.
8. Place copies of the following files from the ebase source in the newly created "ebase" folder on the server computer:
 - LicenseReadMe.txt

After the copying operation, a copy of this file should be found on BOTH the server and the client computer.
9. Move the following files and folders from the ebase source location to the client computer's FileMaker root directory:
4 Directories/Folders:
 - ebaseSpreadsheet
 - ebaseDocumentation

- ebaseWordProcessing
- ImportData

ebase 2.20 client files

15 Files

- DevLogin.fp5
- ebasesm1.jpg
- ebase2.ico
- EmailList.200
- EmailInBox.200
- EmailOut.200
- FoundSet1.200
- FoundSet2.200
- Groundspring.200
- PayPal.200
- ImportExternal1.200
- ImportExternal2.200
- ImportExternal3.200
- LicenseReadMe.txt
- NetStart.fp5

After the move, these files should ONLY be located in the FileMaker root directory.

(On the Windows OS, the FileMaker root directory would be named something like "c:\Program Files\FileMaker\FileMaker Pro 5". As a check of whether you've identified the correct directory, look for the "FileMaker Pro.exe" file - you want to move these files into the same folder where the ".exe" file is located.)

NOTE: This location is recommended because of occasional problems encountered during operation of client-server ebase installations. It seems that the most reliable links between server and client files are formed when the client files reside in the FileMaker root directory. Other locations for these files occasionally cause difficulties.

10. Verify that copies of the following FileMaker Pro plugins (provided with ebase) are present in the client computer's "Program Files/FileMaker/FileMaker Pro/System" (Windows OS) or "FileMaker Pro:Extensions" (Macintosh OS) folder.
 - POP3it.fmx
 - SMTPit.fmx
 - WinDialog.fmx
 - WindowUtility.fmx
11. Verify that the copy of FileMaker Server on the server computer has the following settings established:
 - a. Ability To Host Database Files That Are Set To "Single-User" Status
 - For Windows OS:
 - i. In the "properties" window, click the "Files" tab
 - ii. Select "Allow Filemaker server to host Single User files"
 - iii. Click "OK"
 - For Macintosh OS:
 - i. In the "preferences" window, click the "Files" tab
 - ii. Select "Allow Filemaker server to host Single User files"
 - iii. Click "OK"
 - b. The ".200" extension is registered in the FileMaker Server "properties" (Windows) or "Preferences" (Mac OS)
 - For Windows:
 - i. In the "properties" window, click the "File Types" tab

- ii. Select "Allow FileMaker Server to open registered runtime solutions"
 - iii. Type "200" into the "New file type" box, then click "Add"
 - iv. Click "OK"
- For Macintosh OS:
- i. In the "preferences" window, click the "File Types" tab
 - ii. Select "Allow FileMaker Server to open registered runtime solutions"
 - iii. Type "200" into the "New file type" box, then
 - i. Click "Add"
 - iv. Click "OK"
12. On the server computer, stop and restart FileMaker Server.
When FileMaker Server restarts, the ebase files that have just been moved to the server computer should be automatically hosted by FileMaker Server.
 13. Start an ebase client session on the data source computer by opening the ebase "NetStart.fp5" database.
If ebase provides access to the same data that is expected, then the conversion has been successful.
 14. On the client computer, create a "shortcut" or "alias" to the ebase "NetStart.fp5" file and place this shortcut in a convenient location.
This shorcut will be used to handily start ebase.
 15. On the server computer, check the accessibility of ebase databases from other computers on the local area network.
It is typically recommended that no DIRECT access to these files should be allowed from other computers on the network. The only allowed network access to ebase files on the server should be through FileMaker Server "hosting" services.
 16. On the Windows OS, if client files were moved into the FileMaker root directory from another location, check the established "file association" for files with ".200" extensions to make sure any reference to an ebase icon correctly specifies the icon location.
If the file association referred to the "ebase2.ico" file that was in the ebase source location originally, step 8 above may have broken that reference by moving the "ebase2.ico" file. In that case, you may want to specify the new location of the "ebase2.ico" file.
 17. Delete archive files for any extra copies of ebase (identified and archived previously in this procedure) that are no longer needed.
 18. Establish an appropriate backup system for your ebase files.

NOTE: The establishment of a reliable backup system is a very important safeguard.

INSTALLING ADDITIONAL CLIENTS

New ebase clients can be installed in three ways:

Alternative 1. "Manual installation"

1. Verify that a copy of FileMaker Pro is installed on the new client computer
2. Make sure that copies of all files identified in step 9 of Conversion Steps above are located in the FileMaker Pro root directory.
These files may be obtained from a currently working ebase client installation, from an archive file containing copies of ebase files, etc.
3. Make sure that copies of the files identified in step 10 of Conversion Steps above are located in the computer's Program Files/FileMaker Pro/System folder.
4. Create appropriate "shortcuts", "aliases", etc.
For a computer using the MS-Windows operating system:
 - a. Create a file association that identifies FileMaker Pro as the software to use when opening files with a ".200" extension.

These associations can be defined from a My Computer or Windows Explorer window. From the Tools drop down menu, select Folder Options, then select the "File Types" tab.

If you want the standard "ebase2.ico" graphic to be used as the icon indicating ebase files in displays like those provided by My Computer, you'll want to define this association to also indicate the use of the the ebase2.ico file in the client's ebase installation directory.

- b. create a shortcut to the ebase "NetStart.200" file and place this shortcut in an appropriate location on the client computer (like inside a start menu or on the operating system desktop)

For a computer using the Macintosh operating system, steps equivalent to 4a and 4b above will be desirable.

NOTE: There may be a need to add steps to account for graphics files used to ebase icons etc. Look in the ebase Web site for further discussion.

Alternative 2. Automatic client installation (Ebase client installer)

NOTE: As of May 2006, no "client installer" is available for ebase V2.2. However, it has been traditional for such an installer to be available, so it seems possible that one will be released in the future.

Alternative 3. Automatic/manual installation (Ebase V2.2 installer)

1. Verify that FileMaker Pro is installed
2. On the new client computer, run a copy of the ebase V2.2 installer
If possible, install the ebase files to the FileMaker Pro root directory.
3. Remove the files indicated in Conversion Steps step 7 above.
Also verify that the file "ebase.exe" (the runtime version of FileMaker Pro provided with ebase's single-user version) is deleted.
4. Verify that the files indicated in conversion step 9 are located in the FileMaker Pro root directory.
5. Create a shortcut or alias to the "Netstart.fp5" file located in the FileMaker Pro root directory and place it in a convenient location.

NOTES on client-server file locations

Clif Graves recommends the following file locations in an article on the ebase webs site (<http://community.ebase.org/?q=node/view/1019>):

- the server side files should be in a subdirectory of the FM server root folder
- the client side files and folders should be in the FM Pro root (the folder where the FileMaker Pro executable is).

These locations are "ideal" for both PC and Macintosh computers. For up to OSX this is still the ideal for client side files but OSX permission/file access rules make alternate locations a necessary choice. Those alternate locations may cause "file not found errors". Read on for help in those cases...

POSSIBLE COMPLICATIONS IN A CLIENT-SERVER ENVIRONMENT

ebasePro relies on a complex series of relationships between FileMaker Pro files. Sometimes these relationships break for unknown reasons (this is especially true in versions of ebasePro earlier than 2.1).

1. The typical behavior indicating this situation is: a dialog window appears that says: FILENAME.200 cannot be found. Please locate FILENAME.200." ("FILENAME" will be replaced with the name of an ebase file, like "log", "contacts", etc.)

2. When you hit “OK”, a navigation dialog prompting you for the location of the appropriate file. (Typically, you *should* indicate the location of the file when this window is presented to you.)

The complication arises because a requested file sometimes resides on the client, and sometimes on the server. Filemaker versions 4, 5, and 6 look first in the last location a file was opened, then onto the network. If you launch ebase, then open a Filemaker Pro file somewhere else on your computer, you end up “re-pointing” Filemaker to a new location for that file. (Filemaker 7 has solved this problem by allowing administrators to specify the exact location of related database files).

The problem can be resolved in a couple ways:

1. If it's a new problem (i.e. it just started happening), you can close ebasePro, then reopen it and the problem should disappear.
2. If it is consistent, you may be able to trace the problem to the specific Filemaker Pro script that contains the incorrect file location and manually “re-point” the script to the correct location (this will require developer access to ebasePro). The ebase Web site's KnowledgeBase or the ebase mailing lists are the best places to get help with this type of problem.

UPGRADING YOUR VERSION OF EBASEPRO

Traditionally, “upgraders” have been available to automate a change from an earlier version of ebase. As of May 2006, no V2.2 upgraders are available. Please check future ebase documentation, the ebase Web site and the ebase mailing lists for availability.

OTHER SOFTWARE AND INFORMATION AVAILABLE TO EBASE COMMUNITY MEMBERS

Additional information and software is available for download from the ebase Web site at <http://www.ebase.org> (an ebase membership is required).

- **ebaseClassic:** The version of ebase designed for small, grassroots organizations with simple data management requirements.
- **“Developer” builds** are released to the ebase developer community as improvements are made to ebase (bug fixes, enhancements). These versions of ebase are released in “preview” form. While we generally do not recommend them for use in production environments, many groups discover the feature enhancements worth the occasional bugs.
- **Example code sets** developed by a variety of organizations are provided
- **“Best Practices”** for code set construction
- **Maintenance/Administration recommendations** outlining important practices for reliable operation of your copy of ebas

Chapter 5 Configuration	1
Initial setup	1
Modify the Admin user record	3
Login as "Admin" to configure ebase	3
Admin and "developer" privileges	4
Invoking "developer" access privileges	4
User accounts, privileges, and permission settings	5
The "Admin" function.....	5
Special entries in the Scripts menu.....	7
Setup ebase	7
Setup Payments	8
Setup File paths	10
Setup Reports.....	12
Setup graphics	12
Setup Custom Labels	13
Win OS Settings	15
Setup organization information.....	15
Setup Billing/receipt information.....	16
Setup Salutation settings.....	17
Dedup Settings.....	20
Other Settings.....	21
LOG Codes	21
Menus	22
How ebase menus work.....	22
To modify a menu.....	23
Users.....	23
Add New User	24
Deleting user records	25
Change user passwords.....	26
Default Codes for User Accounts.....	27
Email Settings for User Accounts.....	27
Error: "Please see your friendly local ebase Administrator"	28
Value Lists.....	28
Review Deletions	29
Maintenance Scripts	30

Chapter 5 Configuration

INITIAL SETUP

The first time you launch ebase, you will be presented with the ability to setup ebase using the "easy start" wizard. The easy start wizard will step you through a series of screens where you enter information about your organization and the skills and interests you want to track with ebase.

You then have the choice of starting ebase with a sample data set (useful if you want to see how ebase works before you start using it, or you want to use the "Getting Started" tutorial), or you can set up ebase without any data. The latter allows you to immediately begin configuring ebase for your organization.

NOTE: Sample data can be deleted at any time after installation. The only data required in ebase are the default Payment, Pledge and Note codes used by a variety of internal process. If these codes are deleted, they will be automatically re-created. You may want to consider using the default Payment, Pledge and Notes codes as your standard payment, pledge, and note codes.

Configuration tasks in ebase can only be accomplished by users with administrator level privileges ("Admin" users).

This section will outline how to run the startup wizard, and then how to further configure ebaseLaunch ebase and run the Setup wizard.

After downloading and installing ebase, launch ebase by going to your ebasePro folder, and double-clicking on the ebase file.

Steps:

1. To start the wizard, click the "**Setup ebase**" button.
2. Fill in your organizations **basic contact information**. Click the NEXT button.
3. Choose the **starting month** of your organizations fiscal year and fill in your organizations billing contact information and your standard billing terms.

For example:

a. Billing Contact Info:

Accounts Payable
My Group
1212 Anywhere St.

b. Billing terms:

Due within 15 days of receipt of this notice.

4. Click on the NEXT button.
5. Enter up to three **interests** your group would like to track. These responses will be used as "code titles" to allow you to "tag" contact records with interests. You can leave the boxes blank if you don't know how to respond or don't want to respond. Click on the NEXT button.
6. Enter up to three **skills** you wish to track in your membership. You can leave the boxes blank if you don't know how to respond or don't want to respond. Click on the NEXT button.
7. Read the instructions presented on the next screen. When you are ready, click on the NEXT button.
8. Choose whether or not you want to include the **sample ebase data**, or to start off with no data in ebase. If you want to go through the Getting Started Tutorial (or just want to play around with ebase), select the Small Set. You can always delete the sample data later. Click on the NEXT button.
9. Review where ebase **stores its various files** on your computer. Click on the NEXT button.
10. Review the data. You can always navigate back through the screens if you'd like to change the data that you entered earlier.
11. Click on OK. ebase will then set itself up based on your choices. When it's completed, click on OK to close the dialog box.
12. **Read** (and print) the instructions on the screen. Click on Done.
13. After the dialogue box pops up to display the default administrative level user name and password to use, click "OK."
- 14. ebase will restart. You will then be prompted for a username and password.**
15. Enter "Admin" (without quotes and not case-sensitive) in the User Name field and "Admin" (without quotes and not case-sensitive) in the Password field.
16. Click "OK" and ebase will open on the **Main Menu** screen.

MODIFY THE ADMIN USER RECORD.

1. Click ADMIN on the Main Menu
2. Click ADMIN>Users to go to the ebase user list.
3. Click the "Admin" link in the Account Name column.
4. Edit the entries in the following fields to create a secure login ID, password, and user ID (account name) for you as database administrator:
 - a. LoginID (enter your own user name)
 - b. Login Password (enter your own password)
 - c. User ID (enter your full name)
 - d. UserNote (optional)

CAUTION: Do NOT change the Privilege Level-it MUST stay set to "Admin" or you won't be able to access the administrative level again! You may want to write down your LoginID and Password for reference later. If you change the Admin LoginID and password, then forget what you changed it to, you may not be able to get back into your copy of ebase. Store the paper you wrote your ID and password on in a secure location that you will remember later on. Many organizations have a central file where they keep their employees account information. If your group doesn't have a system like this, you may want to raise the issue with your Executive Director.

There's nothing like having a locked user account to ruin your day.

5. Leave all the permissions settings checked as is.
6. You can come back later to edit the Default Code for your account. Before doing this, you will need to set up your code system, described later in this manual. When you've set up your codes, you can come back and select your "default" code for this user (it's ok to leave it blank too).
7. Enter the appropriate email settings for your account at the bottom of the screen. For more information on these settings, see the section on Email later in this manual.
8. Click "OK" > ADMIN > MAIN MENU > QUIT.
9. Click "Login" and then login using your new LoginID (User Name) and Password.

You will be prompted for a password. The first time you login to ebase, you should login as an Admin user (so you can have complete access to all administrative level features).

LOGIN AS “ADMIN” TO CONFIGURE EBASE

To login as an Admin user, launch ebase and then use the default admin level username/password combination:

Username: Admin

Password: Admin

After you login, you will be taken to the MAIN menu.

CAUTION: When you login as Admin, you have the ability to delete ebase records. This not only lets you delete bad data, but it also gives you the ability to make ebase completely non-functioning. ebase stores security and navigation data as records, just like it does names and location data, as Admin you have the ability to delete that data, and render ebase useless.

You should then create a secure user name and password for your administrative level access.

CAUTION: Do not forget your new administrative level password.

NOTE: ebase is shipped with sample data. We recommend that you use the sample data to familiarize yourself with ebase. To delete the sample data, go to ADMIN>Maintenance Scripts and choose the "Delete All Data Name and Address Data" link. This will delete all contact records in ebase. Use it with care!

ADMIN AND “DEVELOPER” PRIVILEGES

ebasePro was designed to be able to be significantly altered by developers and administrators, but to be “locked down” for users. Most of the configurations outlined in this section can be accomplished by Admin users. However, in some cases, you may want to configure ebase even further. This may require getting access to the underlying ebase programming.

It is important to understand that while ebase is configurable in many ways from minor to major, these changes should be undertaken with a solid knowledge of ebase structure and an assessment of the pros and cons of such changes. The keys to ebase program are provided freely, but it's your responsibility to use them wisely.

To get access to the FileMaker Pro field definitions, scripts, layouts, relationships, and value-lists, you need to have “developer” level access and you need to be running ebase with FileMaker Pro instead of the ebase runtime engine.

Invoking “developer” access privileges

“Developer” access is enabled using a special login procedure. To login as a developer:

1. Go to the ebasePro folder.
2. Locate the file called **DevLogin.fp5**. DevLogin is the “developers login” file that contains special passwords to “unlock” the collection of files that make up ebase. Launch **DevLogin.fp5**.
3. Enter the password: “admin”.
4. DevLogin will then launch ebase. Login as an “Admin” user and you will now find that all of the FileMaker Pro menus are open to you.
5. **Document any changes made.** This is not a trivial step. Keeping a record will be invaluable both for trouble-shooting and, after an upgrade, renewing any core file configuration. (See the Glossary for further information on “core files”.)

NOTE: Core files are the parts of ebase that will be replaced during an upgrade. ebasePro “core” files should only be configured, if at all, with extreme caution and the full knowledge that these changes will be overwritten by an upgrade.

NOTE: ebasePro is designed to allow configurations by linking external modules to core ebase processes.

However, external modules can be developed and then “attached” to the core files. By developing external modules to ebase, you avoid the possibility of having your work overwritten during upgrades.

CAUTION: When you make changes as a developer to ebase core files, you are changing the basic structure of ebase. By changing the basic structure, you may find yourself with software that won't work properly, and no one may be able to understand why. You may find after making changes to ebase, depending on the nature of those changes, that standard troubleshooting procedures might not find the source of the problems you experience.

Additionally, the ebase upgrade function will likely not work if you alter ebase core files. If you think you need to configure ebase by altering fields or layouts, stop and consult the developers community email list before proceeding. There are several techniques that can be

employed without modifying ebase core tables. As these techniques become documented, they will appear in the ebase developers documentation and on the ebase community site.

User accounts, privileges, and permission settings

ebase user privilege levels and permission settings determine what data each user can view and access in ebase. Database administrators assign privilege levels to individual user accounts.

ebase's privilege levels, the custom names assigned to them, and the features of those privilege levels are:

- Admin -- Can access all menus, administrative functions and can delete records.
- Superuser -- Can access all menus except for admin functions and cannot delete records.
- User1 – (the “Volunteer” user account): Can access all menus except for admin and cannot delete records.
- User2 – (the “Activist” account): Can access all menus except for admin and cannot delete records.
- Guest — Can access only technical support and quit menus. This account is essentially “disabled” because it is the default login account – if you fail the username/password login, you will end up in the Guest account. This account is setup (by default) to allow you to get to technical assistance, but not use any ebase features.

Only users with "admin" level access privileges can enter ebase's administrative functions area, see ADMIN on the Main Menu screen or in the ebase navigation bar, and have access to special Admin data functions within ebase (for example, Admin users can edit payment records AFTER they have been posted).

There are no other preset privileges assigned to the other user accounts, save those indicated above. Except for Admin, the User levels are there for organizing your own user level names, and have no access significance by default. You can, however, customize each user level by:

- Re-labeling the levels with names that reflect the groups of users in your organization.
- Select the privilege levels that can edit contact records. Privilege levels that cannot edit contacts will not see the "Add a Contact" link on the menu. They will be able to add entries.
- Choosing which menus are accessible to each privilege level.

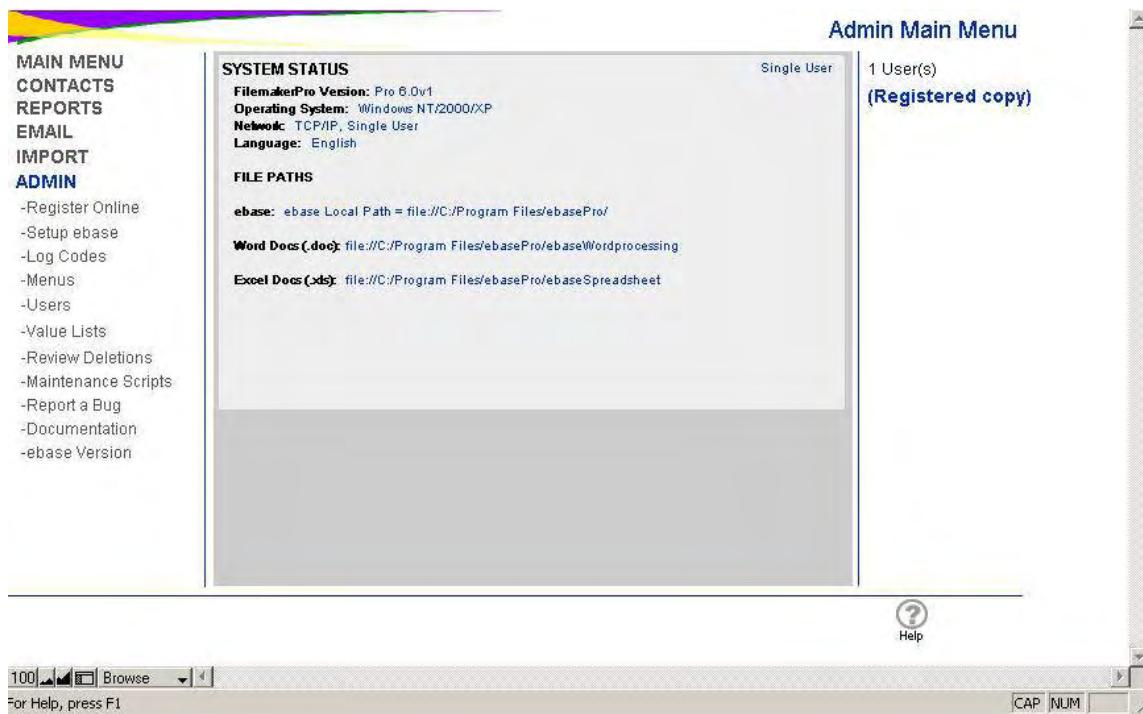
Privileges for specific users that don't affect the entire privilege level may be customized by choosing whether each individual user may see the data in the Recent Entries list on the Contact Overview screen.

NOTE: You can further customize privileges by selecting which menus on the left navigation bar are accessible to each privilege level (see help topic "Customize Menus"). You can also choose whether a user may see data in the recent entries list on the Individual Overview screen (see help topic "Add New User"). When creating a code, you can choose to hide only that code from the Recent Entries portal by selecting the "hide from Public Hx" box.

THE “ADMIN” FUNCTION

Admin users have access to all Admin functions, accessible by clicking on the ADMIN menu in the MAIN menu or at the bottom of the navigation bar. Throughout this manual there will be references to ADMIN>(function). This means click on the ADMIN menu, then click on the named function. The next sections of this document outline the ADMIN functions that you will see after clicking on the ADMIN menu.

Figure 1: The Admin screen



Notice that on the menu, the screen that you are on is highlighted in blue. This is to help keep you oriented when you're moving around ebase.

The choices in this menu are:

- **Register online:** Takes you to the membership area on the ebase website. Click on it and become an ebase community member.
- **Setup ebase:** Basic configuration parameters. These functions are described below.
- **Log Codes:** Add or modify the log codes which describe the kind of information you want to track with ebase. These functions are described in the section on the Log.
- **Menus:** Customize ebase navigation menus. These functions are described below, and in the Developer appendix to this manual.
- **Users:** Add or change user settings and privileges. These functions are described below.
- **Value Lists:** Change or add system-wide value lists. This function is described in the Developer appendix.
- **Review Deletions:** Review contacts, entries, and links that have been marked for deletion and delete or restore them. This function is described below.
- **Maintenance Scripts:** Run maintenance scripts that update data based on changes, rebuild indexes or re-synchronize report "helper" files. This function is described in the section entitled Maintenance.
- **Report a Bug:** Link to the online ebase bug tracking database where you can report bugs or make feature requests (requires free login account).
- **Documentation:** Link to user documentation inside the Documentation folder, inside your ebasePro folder.
- **ebase version:** Shows version of ebase and ebase core file version ID's

NOTE: If you are using ebase in client/server mode, changing many of the ebase configuration settings from a client will only change the setting for that particular client session. ebase will revert back to previous settings unless the changes are made to the ebase.200 file PRIOR to being installed and launched on the server (host) computer.

Special entries in the Scripts menu

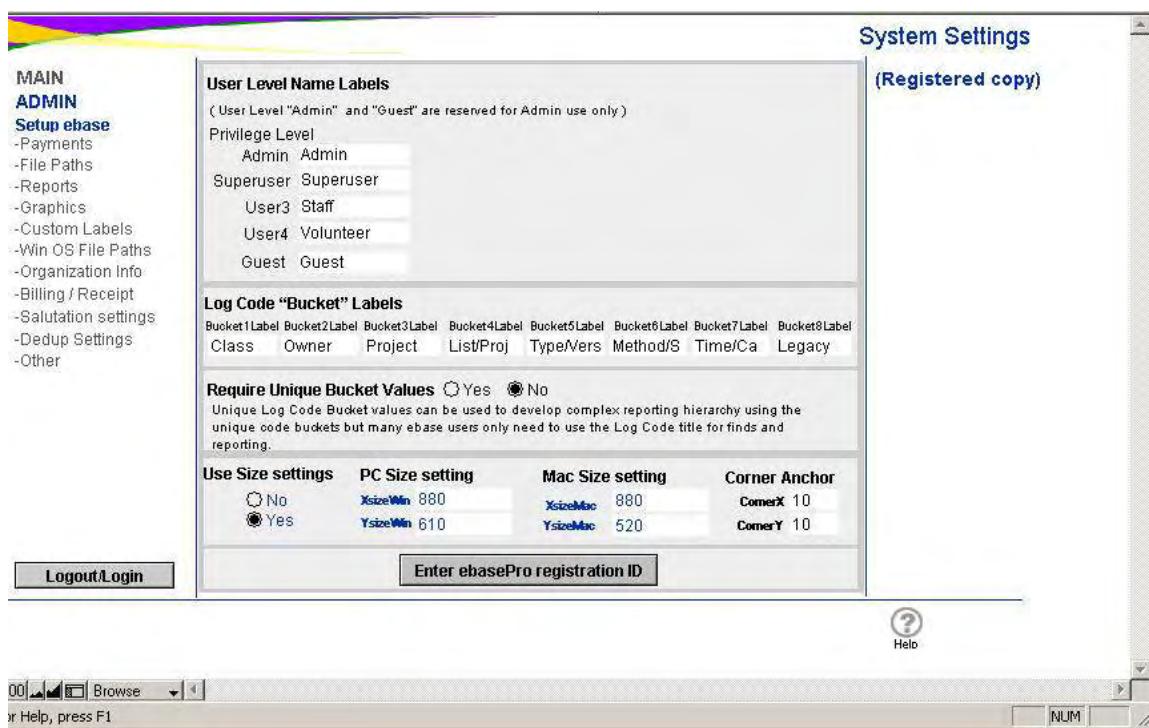
When you are in the Admin function, you'll notice that the Scripts menu at the top of your screen contains entries in addition to the standard ebase shortcuts:

About ebasePro: Contains a link to the ebase Entity Relationship (ER) diagram

ebase@license: The ebase open-source license, plus the licenses that come with the proprietary plugins.

SETUP EBASE

Figure 2: The Admin>Setup ebase screen



ADMIN>Setup ebase allows you to configure:

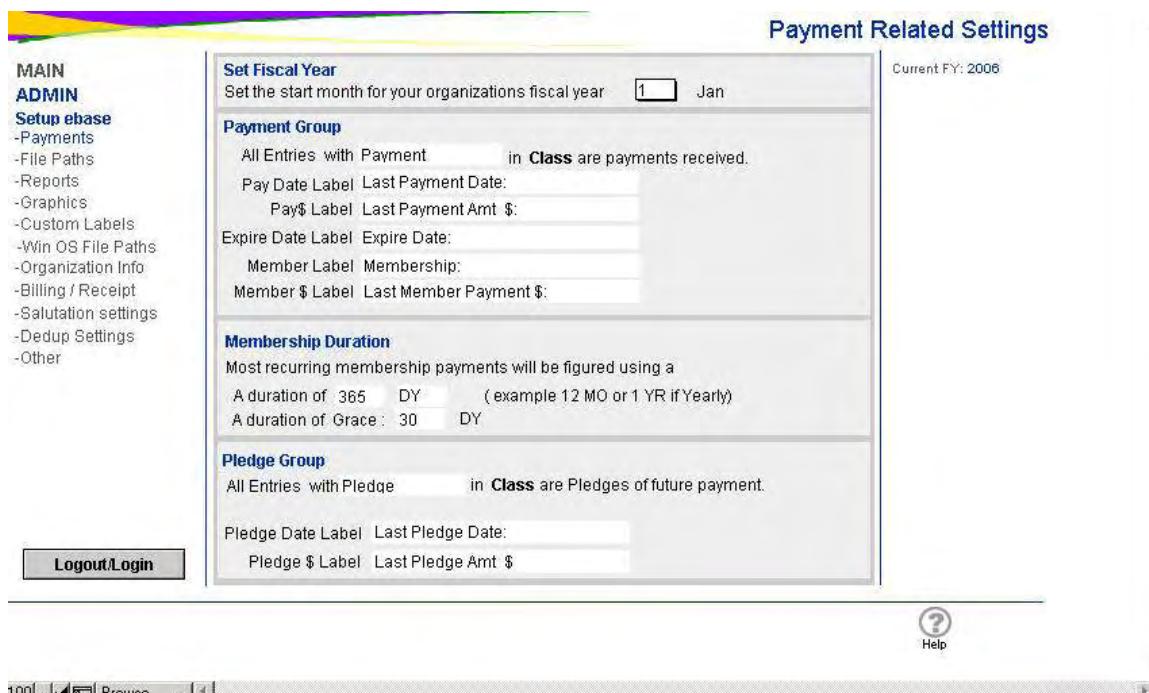
- View version IDs
- Set screen size settings
- Modify payment, path, Windows and other settings, add your groups organizational info (for reports), and add custom labels and graphics to ebase

Steps:

1. Click on ADMIN>Setup ebase.
 2. Review the names of the privilege levels in the User Level Name Labels section. If you wish, you can edit the labels of the second, third and fourth privilege levels so they reflect the types of user levels in your own organization. The default privilege levels are:
 - **Admin** --highest level of access, default privilege level name is Admin
 - **SuperUser** -- second highest level of access, default privilege level name is SuperUser
 - **Staff** -- third highest level of access, default privilege level name is Activist
 - **Volunteer** -- also third highest level of access, default privilege level name is Volunteer
 - **Guest**--lowest level of access
- NOTE:** Admin and Guest are reserved names. We recommend that you do not change the names of these two privilege levels. You may add additional user level names when adding or editing a user in ADMIN>Setup Users. See help topics "Add New User" and "View User" for more information.
3. In the middle of the screen are the fields where you can revise the Code Bucket Labels. These labels show up next to the Code Bucket fields when you add or edit a code. Please wait to edit the labels until after creating your code system.
 4. Require Unique Bucket Values: This setting lets you require unique values for code "buckets." The default setting is to require unique codes. Unique values can be very useful when creating complex queries to filter Log entries. However, turning this setting on forces users to create unique bucket codes for each entry code. This adds to the amount of time it takes to create new entry codes.
 5. The various window size settings at the bottom of the screen allow you to customize window sizes to your computer. We recommend keeping the "Use Size Settings" field set to "Yes" in order to maintain uniform window sizes. Changes to these settings will affect all users on a client-server or peer-to-peer network. The "Corner Anchor" allows you to reposition the ebase screens a fixed distance from the left hand margin of your screen. (This is most useful to Mac OSX users who position their dock on the left-hand side of their screen.)
 6. Click "Admin" to return to the Admin Main Menu screen.

Setup Payments

Figure 3: The Admin>Setup ebase>Payments screen



The Payment settings screen lets you set the start of your fiscal year, edit the item class that is used to identify payment and pledge data, edit label titles used for displaying payment related data, and set the duration of your organization's memberships.

ebase supports organizations whose fiscal year starts on a date other than January 1. In each payment entry there are 2 dates recorded: the DatePosted and Stored FY. DatePosted is filled in by the user when creating the entry. On a new Log entry, the Stored FY is filled in automatically when the record is committed, and is calculated based on the DatePosted, Credit in FY, and the setting of the start month on this screen. Once a Log entry is committed, then Stored FY will only be changed when explicitly directed by the user.

Changes to the start month on this screen or changes to DatePosted or Credit in FY in a particular Log entry won't automatically change the Stored FY. The payment layouts have a button 'Update FY' when can be used to force a new value to be stored. All finds and reports in ebase use the Stored FY value.

Generally, you will not need to change the default class settings used to calculate payment and pledge data. The only time you would need to do this is if you created a customized coding system with entry classes that were different from the default ebase classes. (You may want to consider using the "default" Payment code (required by ebasePro) as your own default payment code.)

From the top of the Payment settings screen:

Set Fiscal Year

Set the number of the month that starts your fiscal year.

Payment Group

- All entries with ____ in **Class** are Payments received. -- the code class (Bucket 1) that ebase uses to calculate reports and payment metadata.
- Pay Date Label -- label for last payment date
- Pay\$ Label -- label for last payment dollar amount

- Expire Date Label -- label for expiration date (expiration date calculated based on fields in the "Default Recurring Renewal/ Donation Duration" section)
- Member Label -- label for membership status ("Current", etc.)
- Member \$ Label -- amount of last payment that was counted towards membership

Membership Duration

- A duration of ____-- length of membership period
- A duration of Grace -- length of grace period after membership expires

NOTE: The membership duration and the grace duration must be in the same units. If you have a two year membership with a three month grace period, you should enter the two year membership as 24 *months* and the grace period as 3 *months*. If you have a year long membership with a two week grace period, you should enter the membership duration as 52 weeks and the grace period as 2 weeks.

Pledge Group

- *All Entries with ____ in Class are Pledges of future payments. -- the code class that will be used to calculate pledge information
- Pledge Date Label -- label for the date of the last pledge
- Pledge \$ Label -- label for the dollar amount of the last pledge

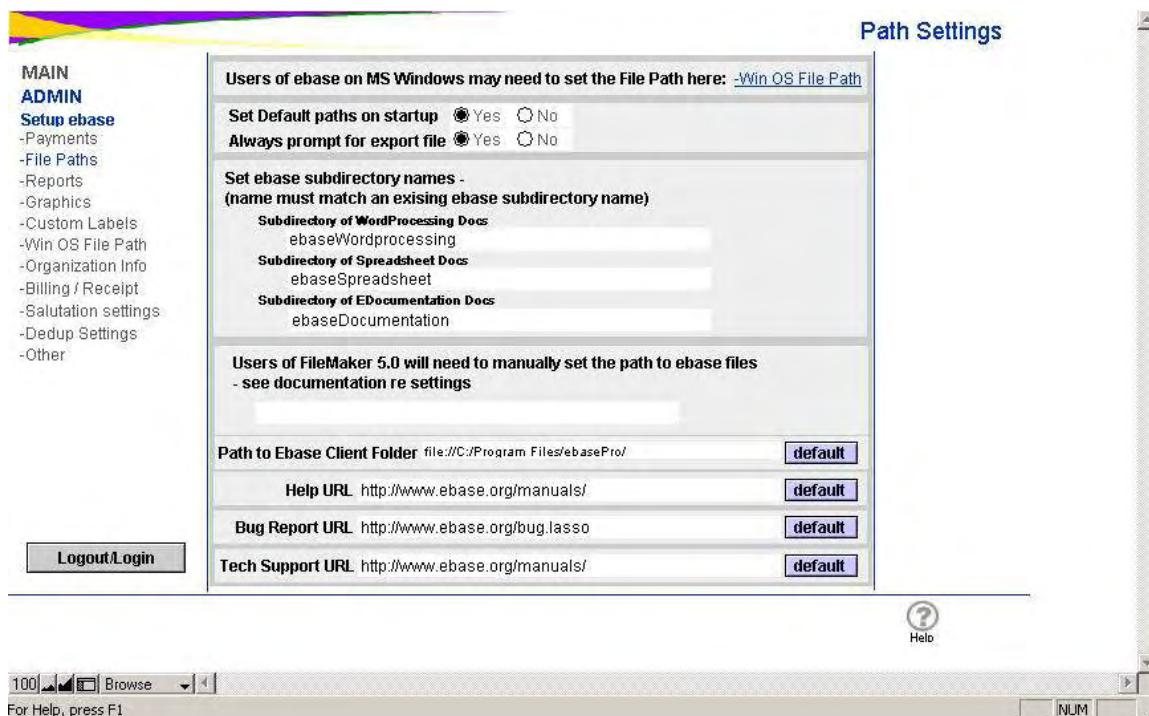
Steps

1. Click on ADMIN>Setup ebase and click on "Payments".
2. Fill in the start month for your fiscal year. This will be reflected in your fiscal year calculations throughout ebase.
3. In the Payment Group area at the top, "All entries with Payment in Class are payments received" states that payment metadata will be calculated using all log entries with the class of Payment. Select a different value from the pop-up list ONLY after using the Code Tutorial to design your codes and define your list of classes (see the Codes chapter in this Manual)—and then only if necessary.
4. If you want to see different wording for the metadata entries about payments on the Individual Overview screen, edit the label values next to the fields: "Pay Date," "Pay\$," "Expire Date," "Member," Member \$. For example, you might want to change the "Expire Date" label to "Renewal Date."
5. In the Membership Duration area in the middle of the screen, set the duration that ebase will use to calculate whether a membership is "current" or "expired."

NOTE: Default duration data can be edited for a specific payment when you enter that payment.
6. If you want new default membership duration to be reflected on all entries already added to contacts, click the "Update Membership Related Meta Data" button.
7. In the Pledge Group area, if necessary, select a different value from the pop-up list for the Class ONLY after designing your codes and defining your list of classes.
8. If you want to see different labels for the metadata entries about pledges on the Individual Overview screen, edit the label values in the fields next to: "Pledge Date" and "Pledge \$ Label."
9. Click "OK" and then "Admin" to return to the Admin Main Menu screen.

Setup File paths

Figure 4: The Admin>Setup ebase>File Paths screen



Path settings display the directory paths for your ebase files, and for the Word and Excel document template folders used for many ebase reports. You can use these settings to configure ebase to prompt you for a location to save a file and prompt you to choose the fields you want to export.

Depending on where on your computer you install or move your ebase folder, you may have to reset these default paths to enable the ebase templates to locate your Word and Excel templates.

If you are using FileMaker Pro 5.5 and 6.x, the correct path may be automatically set during installation. You do not need to make any changes on this screen unless you want to locate WordDocs and ExcelDocs in a location other than the default folder, such as a network drive. That being said, FileMaker is "quirky" in how it sets file paths and you may need to use these settings.

If you are using FileMaker Pro 5.0...

You will need to manually set the path as outlined below.

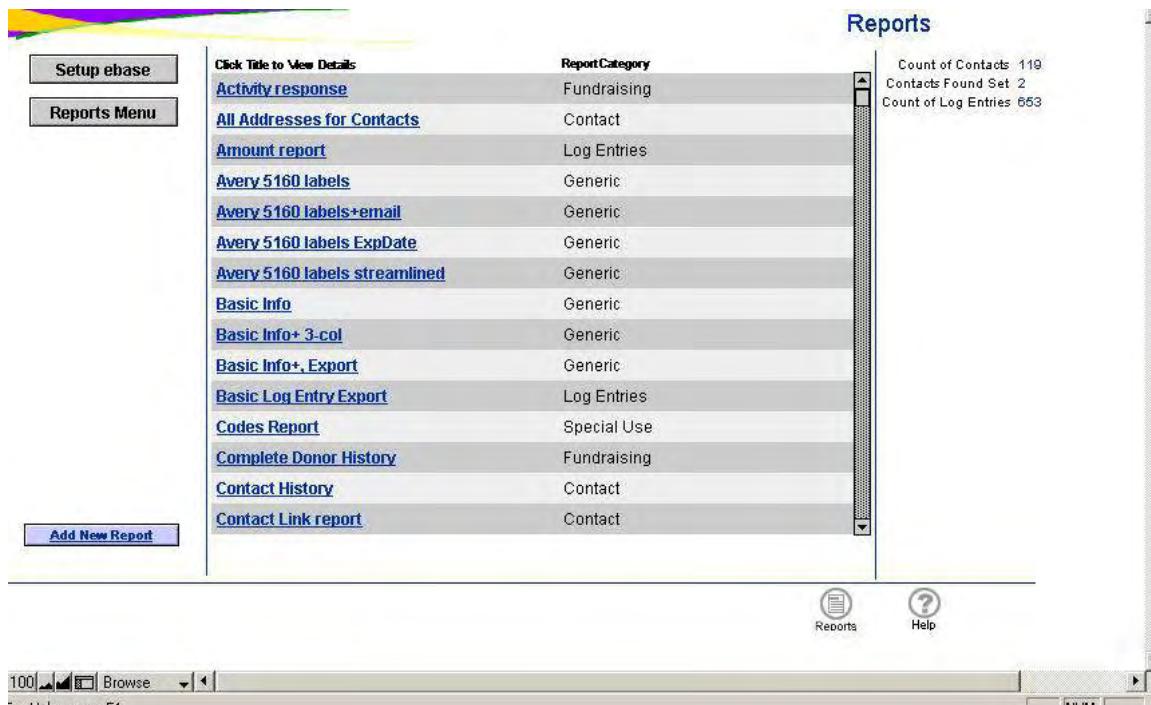
CAUTION: While the user interface allows you to change the path for ebase files, this feature is not supported at this time. Path settings are not updated in all scripts when you make changes to the path. If you do make changes, you may lose functionality of some features. Other scripts would need to be modified in order to maintain the functionality of ebase.

Steps:

1. Click on ADMIN>Setup ebase and click on the "File Paths" .
2. If you are using FileMaker Pro 5.0, enter the correct directory path name under where it says "User of FileMaker 5.0 will need to manually set the path to ebase files see documentation re settings"(If you are using FileMaker 5.5, the directory paths should already be set and you do not need to do anything.)
3. Configure the rest of the paths as appropriate for your setting.

Setup Reports

Figure 5: The Admin>Setup ebase>Reports screen



This area lets you directly edit ebase Report records to change their behavior. ebasePro's Reports module uses these Report records to "make decisions" about how a report should be run. These settings should only be altered by developers interested in adding new reports or modifying existing reports. These settings are described in detail in the Reports section of this manual.

Setup graphics

Figure 6: The Admin>Setup ebase>Graphics screen



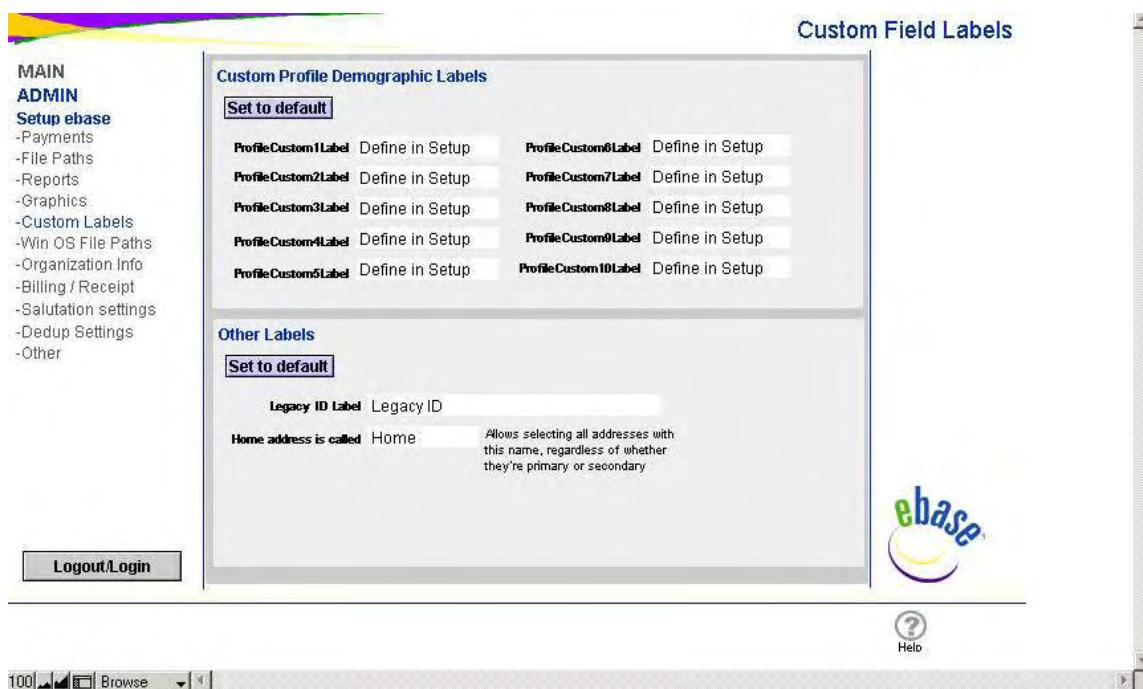
ebase's Graphic Settings enables you to insert custom graphics in place of the default graphics. You can customize the logo graphic that appears in each screen (currently the ebase logo); the graphics used in the navigation icons; and the highlight colors of red and gray (for instance, red is currently used to identify records marked for deletion).

Steps:

1. Click on ADMIN>Setup ebase and click the "Graphic" button.
2. Right click on any of the fields into which you want to place a new graphic; option-click if you have a Mac.
3. Click "Insert Picture," then navigate to the location of your new graphics file on your computer, and select the new graphics file.

Setup Custom Labels

Figure 7: The Admin>Setup ebase>Custom Field Labels screen



ebase allows you to customize the labels of up to ten additional demographic data fields in a contact's profile.

Data entered in the customized profile fields are stored in the Contacts.200 database. You can add or edit custom profile data by navigating to a contact's Profile screen (CONTACTS>Profile). You can search on custom profile data by performing a contact search.

NOTE: The data contained within these profile fields will not be overwritten when you upgrade to newer version of ebase. However, any customizations you have made to the Layout or the Field will be overwritten by any upgrades. The only exception is for field labels. Since custom profile field labels are based on data you enter in ebase, the field labels will not be overwritten.

For instance, if you create a value list for a custom profile field, that value list will be overwritten, but the field labels and values that have already been chosen will remain.

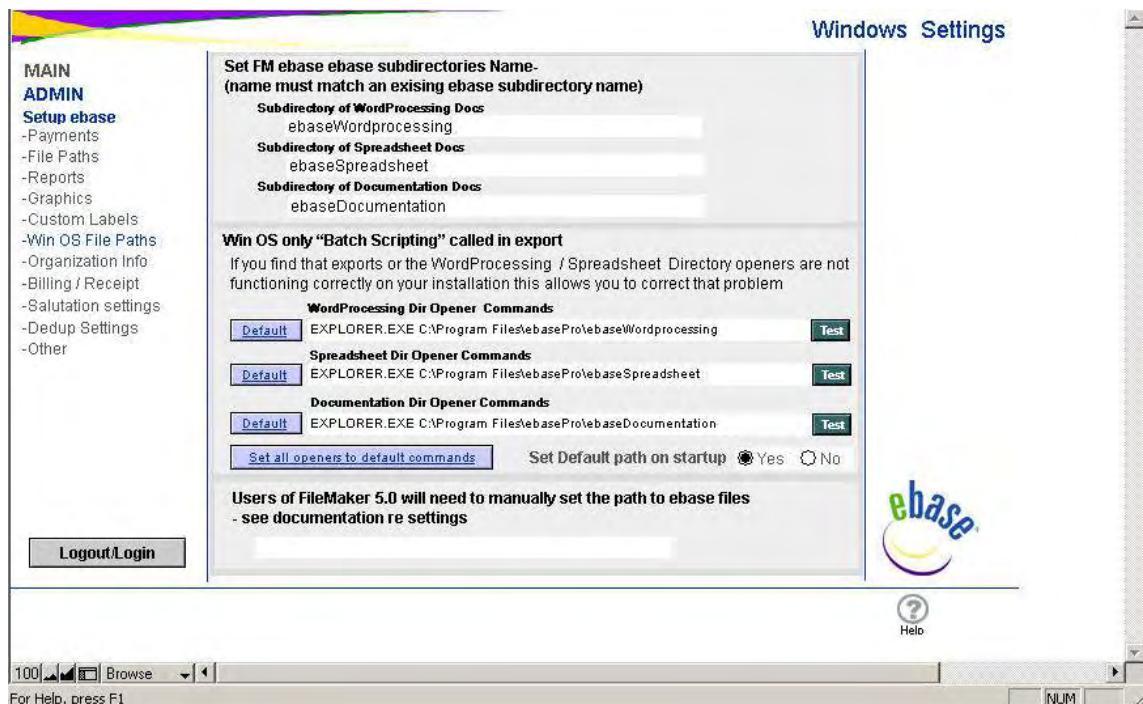
Steps:

1. Launch the ebase file DevLogin.200 to login as a developer.
 2. When prompted, enter the password "admin". Then, enter your administrator login information.
 3. Click on ADMIN> Setup ebase>Custom Labels. Enter the labels for the fields you want to customize in the profile. .
- NOTE:** The next steps are for people who are familiar with FileMaker coding. Even if you are familiar with FileMaker, you should backup your database before you make the following changes.
4. Click on CONTACTS to open the Contacts.200 database. In Layout mode, navigate to the Profile layout.
 5. Change the field format for ProfileCustom1 to your desired format. (This is where you specify the type of data to be entered and any validation or a picklist.)
 6. Navigate to the FindProfile layout and make the same changes to ProfileCustom1 as you did on the Profile layout.

7. Change to browse mode and test to make sure your changes are correct.

Win OS Settings

Figure 8: The Admin>Setup ebase>Windows Settings



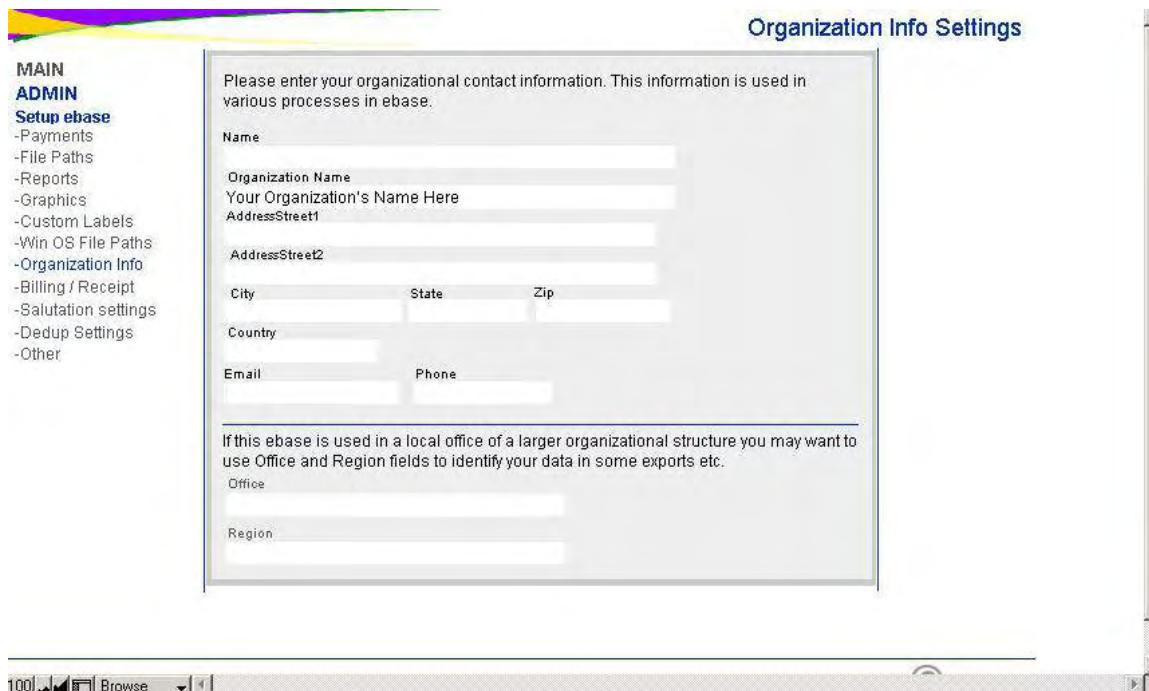
The Windows Settings screen allows you to change the folder that ebase automatically opens after performing a word or excel export. These settings are only applicable to Windows-based computers.

Steps:

1. Go to ADMIN>ebase Settings>Win OS File Paths
2. Edit the paths as necessary. Changes will be reflected immediately.

Setup organization information

Figure 9: The Admin>Setup ebase>Organization Information screen

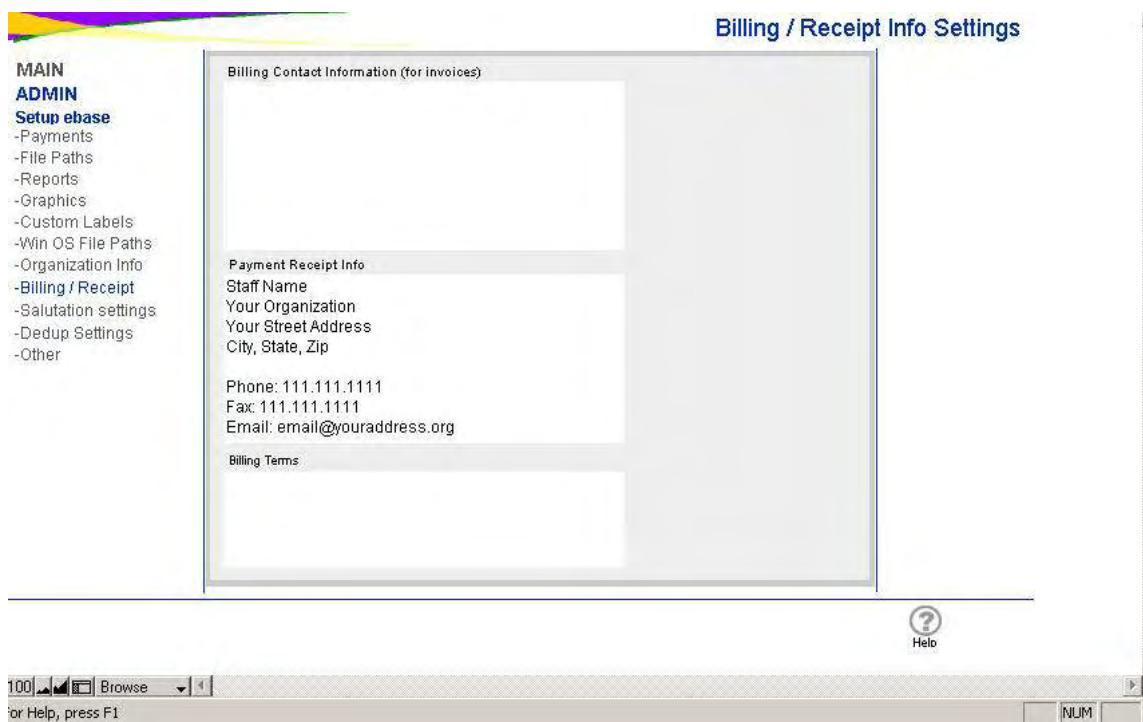


ADMIN>Organization Info takes you to the Organizational Information screen. If you filled in organizational information during the setup process, the results are stored here. This information is used in ebase's automated registration process and can be used on invoices you generate using ebase.

Note that the Organization Name (RegisteredOrg field) is used in various ebase reports to identify your organization. The Office (RegisteredOffice field) and Region (RegisteredRegion field) can be used to identify your data if you are part of a larger organization which shares information.

Setup Billing/receipt information

Figure 10: The Admin>Setup ebase>Billing/Receipt screen



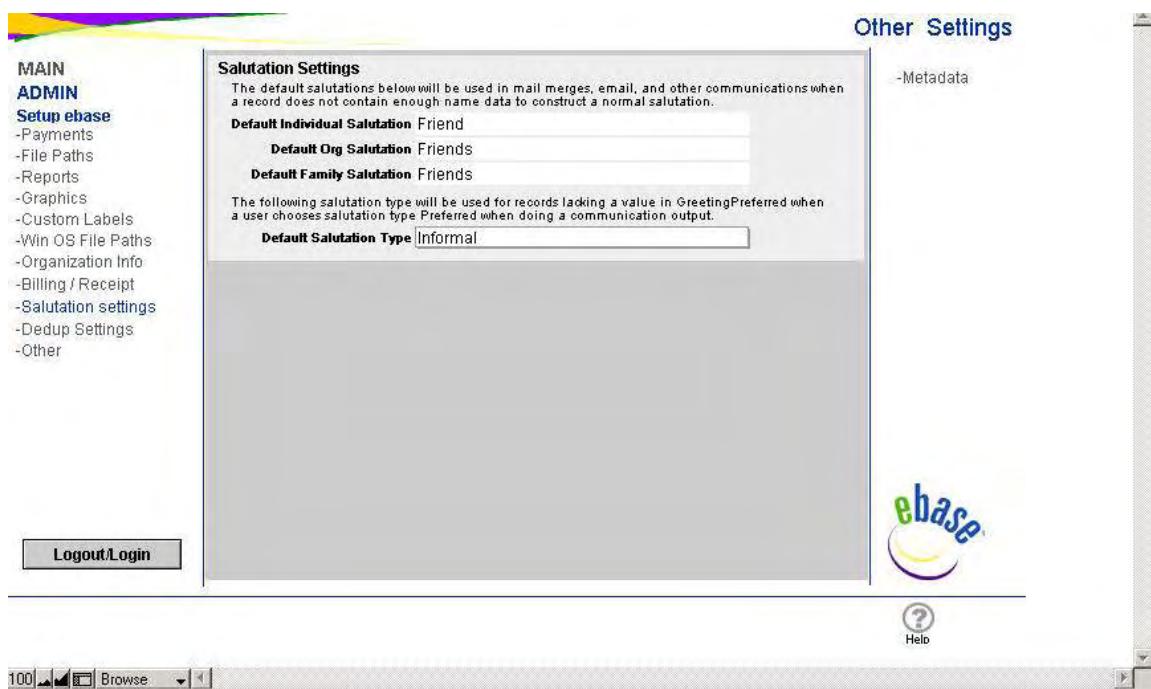
ADMIN>Billing/Receipt lets you enter billing and receipt data that will appear on different forms inside ebase. Simply enter your Billing Contact Information; you Payment Receipt information, (any data that you might want to have show up on a Payment Receipt form, i.e. your organization's contact info, or your departments accounting contact info), and your standard billing terms (if any).

Setup Salutation settings

ebase's Contacts file includes a field `_ccNameSalutation` that provides a name for each contact, drawing on other data in the contact's record and in your ebase configuration. `_ccNameSalutation` is designed to be a field you can merge into the greeting, or salutation, of a letter or e-mail message:

Dear <<`_ccNameSalutation`>>,

Figure 11a: The Admin>Setup ebase>Salutation settings screen



Here's how it works:

For **organization and family contact records**, `_ccNameSalutation` will use the text specified in Salutation Settings (see above) by default. You have the option to specify a custom greeting for any family or organization (in their *Custom Greeting* field) and specify "Custom" as the *Preferred Greeting Type*.

This data will override the default greetings above and insert your custom greeting in `_ccNameSalutation` (which displays, for reference, on the *Edit Address Information* screen as "Exported salutation").

Figure 11b: Greeting preference settings on a contact's Edit Address Information screen

Pref. Greeting Type	Custom
Custom Greeting	Sally and Vern
Exported salutation	Sally and Vern

For **individual contact records**, two more options exist in addition to the default and custom greetings:

If you choose the Pref. Greeting Type "Formal" and if you've specified a last name and name prefix for the individual, `_ccNameSalutation` will contain the prefix followed by the last name:

Figure 11c: Formal greeting preference uses an individual's prefix and last name, if available:

Pref. Greeting Type	Formal
Custom Greeting	
Exported salutation	Mr. Schmitt

If you choose the Pref. Greeting Type “Informal” and if you’ve specified a first name for the individual, `_ccNameSalutation` will contain the individual’s first name:

Figure 11d: Informal greeting preference uses an individual’s first name, if available:

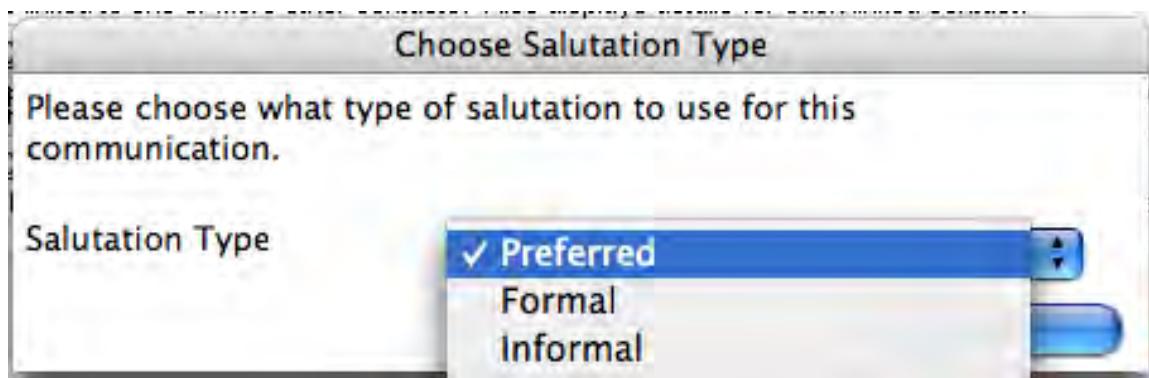
Pref. Greeting Type	Informal
Custom Greeting	
Exported salutation	Bob

In all cases, with all Contact types, when no Pref. Greeting Type is specified:

`_ccNameSalutation` reverts to the Default Salutation Type specified on the Admin>Setup ebase>Salutation settings screen (see above). In all cases, if data necessary to calculate `_ccNameSalutation` is unavailable (for example, if “Formal” is the preferred greeting type, but no name prefix is available), ebase reverts to the Default Salutation Type specified on the Admin>Setup ebase>Salutation settings screen (see above).

Some reports and exports allow you to override the defaults specified above and specify a Preferred Greeting Type to use for all contacts included in the report or export. In such cases, you’ll be presented with an opportunity to specify a temporary preference for all contacts, as in this dialog from Contacts Custom Export:

Figure 11e: Some reports(exports let you temporarily override the greeting preference defaults.



Specifying “Preferred” makes no change: ebase uses each contact’s Pref. Greeting Type (formal, informal, custom, or the default, if the contact has no preference specified) to calculate `_ccNameSalutation`.

Specifying “Formal” will attempt to create a formal salutation for all individuals, regardless of their usual preference.

Specifying “Informal” will create an informal salutation for all individuals, regardless of their usual preference.

If you specified “Formal” or “Informal,” family and organization records will still get the default salutation you specified in Admin>Setup ebase>Salutation settings.

Examples:

1. In general, Org XYZ prefers to communications with its constituents formally, by last name. Set the Default Salutation Type on Admin>Setup ebase>Salutation settings to “Formal.” `_ccNameSalutation` will contain formal greetings by default.

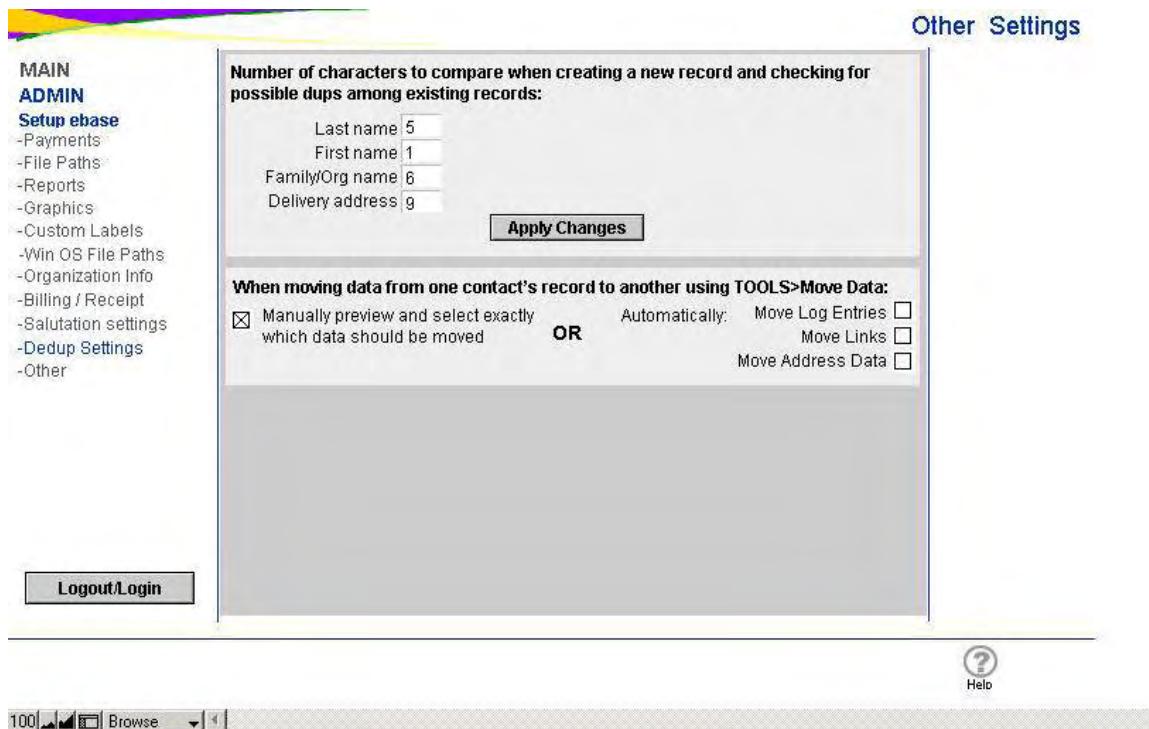
2. Roberta Delaney likes to be addressed as "Bobbie." *Navigate to Roberta's record and set her Pref. Greeting Type to "Custom" and specify "Bobbie" as her Custom Greeting. _ccNameSalutation will contain "Bobbie" for Roberta Delaney.*
3. In general, Org ABC addresses its constituents informally, but Mr. Mbogo prefers a more formal style of address. *Navigate to Mr. Mbogo's record and set his Pref. Greeting Type to "Formal." Be sure that his Prefix is set to "Mr.". _ccNameSalutation will contain "Mr. Mbogo" for Mr. Mbogo.*
4. For a letter mailing to a list of individuals, Org 10-12 likes to use a formal greeting for all. *When prompted by the report wizard, specify the Salutation Type "Formal." _ccNameSalutation will contain formal greetings by default for this one export.*

Dedup Settings

When you add new contacts and addresses to your ebase data, it's important to avoid certain kinds of duplicates. While you might want to have individual and family records for "Fredrick Johnson," for example, you want to avoid adding a new record for the same man under the name "Fred Johnson." Whenever you add a new contact name or address to ebase, you have the opportunity to review suspected duplicate records already in ebase ("dups") and, if appropriate, abandon your data entry in favor of working with an existing record.

In ebase 2.11 and later versions, you have some control over what "fragments" of your data are examined when the system checks for dups. The dedup settings are where you can specify how strict or loose ebase should be in comparing a new record to your existing data in hopes of avoiding duplicate entries or, in comparing pre-existing records and "weeding out" dups

Figure 12: The Admin>Setup ebase>Dedup settings screen



Before you make any changes to the default dedup settings, **please read the section in Chapter 7 on "Avoiding Duplicate Contact and Address Records".** This section provides a detailed

explanation on what ebase does when it looks for duplicates and what you can do when a duplicate is found.

NOTE: contact records flagged for deletion are not evaluated when ebase checks for duplicates, and will not appear in the "Possible Duplicates" area during data entry.

In general, comparing more characters will result in fewer matches being presented in the "Potential Duplicates" area when you enter data. Specifying fewer characters for dupcheck comparison will result in more potential duplicates being presented for your consideration.

NOTE: If you change any value in Dupcheck Settings, be sure to click "Apply Changes" before returning to data entry.

Other Settings

Figure 13: The Admin>Setup ebase>Other settings screen



These are dangerous settings; located here to keep them from accidentally getting selected. They are used mainly for development and upgrading purposes.

The first function will delete all of your contact, log and code data in preparation for importing or adding new data. It cannot be reversed. If you click on the link that says: "Delete All Name, Address and Code Data" it will all disappear.

The second function will delete only name, address and log data, but will leave the codes.

LOG CODES

Codes are used to describe information that you want to track about a contact. These settings are described in the section on Entries.

MENUS

ebase's system of user privilege levels, combined with customizable menu settings, provides a high degree of flexibility in restricting access to sensitive material. ADMIN>Menus enables you to establish which menu entries and related functions are off-limits for which users. For example, in the original default settings shipped with ebase, a number of menu entries are hidden from users who login at the "Activist" privilege level. For instance, Activist level users cannot add a contact record.

How ebase menus work

Most of the navigation menus (with the exception of the menus in ADMIN) are data-driven, that is, they get their values from menu records. ADMIN>Menus lets you modify menu entry record values, and lets you hide specific menu entries from users with specific privilege levels. This data-driven navigation system makes the look and feel of ebase highly customizable and easy to do, IF you follow the rules.

The ebase navigation system works this way:

1. When a user logs in, menus are loaded into a local users "Navigator" file. ebase keeps track of user privilege levels (stored in the ebase.200 file), and only displays those menu records authorized by a user's specific privilege level.
2. When a user clicks on a menu entry, ebase then goes to a script in Navigator called the "navigator switchboard" which simply compares the name of the menu entry, with text in a matching navigation script.
3. If a menu title is changed, the matching navigation script has to be changed as well, otherwise ebase won't find a match between the menu record and the matching navigation instructions.

All of the ebase menus work this way, with the exception of the menus in the ADMIN function. These menus are actually FileMaker Pro buttons and are not data-driven (just in case all the menu data is deleted by accident – you'll still want to be able to get into ebase).

If you modify a menu, it's important that you run the "Update menus" button to see the results.

CAUTION: It is not recommended that you change a menu entry name. Rather, to maintain upgradability, you are advised to ADD a menu record, then add a custom navigation script to NavCustom.200 (there are more details on this process in the Developers appendix). Before making any changes to your menus, you should back up ebase and be sure you have an understanding of how editing menus works. Editing menus in your database incorrectly can break navigation and in some cases (e.g. if you disable access to the ADMIN menu for all levels of user) you won't be able to easily recover.

The following information about menus may be customized:

- **Menu Order:** This determines where the menu is on the left navigation bar. It is based on ascending numerical order. Note that you will not see all menu entries and sub-entries listed at once.
- **_KContext1:** The name of the database that this menu is associated with. (Automatically calculated when adding a new menu entry.) Edit this field with caution.
- **Indent:** Determines whether a menu entry should be indented or not. It does not determine which entries are main entries and which entries are sub-entries.
- **Highlight:** Determines whether a menu entry is highlighted (blue) or not highlighted (gray). The highlight and non-highlight colors can be modified under ADMIN>Setup ebase>Graphic Settings.

- **Use on one Layout only:** Check "Yes" if you only want to show this menu on one layout in the database. (Will work only if you specify the layout in the "Layout Name" field.)
- **Layout Name:** Name of the layout in the database specified in "_kContext1" field that you want this menu to appear on.
- **Hide Menu:** Determines the privilege levels that can see this menu entry. Edit this field with caution. Do not disable ADMIN access for all user privilege levels--you won't be able to access the Admin screen again.
- **Create menu explanation:** Allows you to create an explanation for the menu that is listed below that menu on the Main Menu layout in the Main database. (No other layouts currently use this feature.)
- **Text of menu explanation:** Specify text that will be listed under the menu entry on the Main Menu layout in the Main database.
- **Icon to associate with menu entry:** Right click on a PC and command-click on a Mac to add an icon to associate with the menu entry on the Main Menu layout of the Main.200 database.
- **Edit Associated Navigation Script:** This is a developer function that enables a developer to modify the navigation script invoked by the menu name. This should only be done by a developer with knowledge of FileMaker scripting and only after backing up the database. See the Developer appendix for more details.

To modify a menu

Steps:

EXAMPLE: Let's allow Activist level users to add contacts in the future.

1. Click on ADMIN>Menus.
2. Click in the pop-up list at the top of the data display area and select "Contacts." This will display below all navigation bar entries and sub-entries currently available in the CONTACTS part of ebase.
3. Locate the "Add Contact" entry in the "Menu Entry" column. Note that the box under "Activist" is checked in the "Hide menu from..." field. Users at the Activist level currently cannot add a contact because the "Add Contact" navigation bar sub-entry is hidden from them.
4. Uncheck the box below "Activist".
5. Click "OK" when done.
6. To confirm that the changes you just made took effect, click "Logout/Login" at the lower left and log in as an activist (login: activist, password: activist).
7. Click on CONTACTS and note that as an Activist level user, you now have access to the CONTACT>Add Contact sub-entry in the navigation bar.
8. Be sure to log back in as an administrator and undo the changes you just made (unless you want to grant these new privileges to Activist level users).

USERS

ADMIN>Users entry takes you to the ebase User List screen, which shows all current user accounts, login IDs, privilege levels, default codes, and notes. This screen is also the starting point for editing user account information.

Steps:

1. Click on ADMIN>Users.
2. Click on any user name in the "Name of user" column of the ebase User List to view details about that account.
3. Edit any of the fields in the user account (see help topic "Add New User" for more details).

4. Click "OK" and then "Admin" to return to the Admin Main Menu screen.

Sample ebase User List:

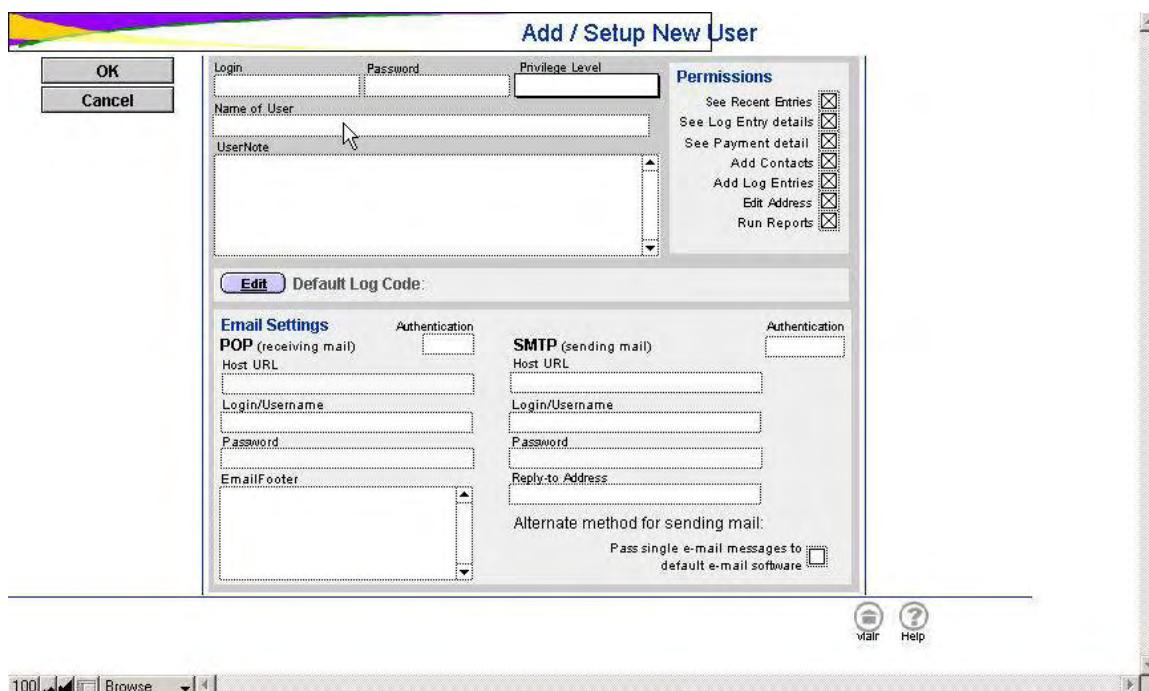


The screenshot shows a window titled "ebase User List". At the top left is a "Admin" button. Below it is a table with columns: Name of User, Login, Privilege Level, DefaultCode, Note, and Duplicate. The table contains five rows of data:

Name of User	Login	Privilege Level	DefaultCode	Note	Duplicate
Admin	Admin	Admin	Interest in	Default Admin account; not	
BethSuperuser	BSuperuser	Superuser	Staff member	Account for use in data import	
FrankActivist	FActivist	Staff	Staff member	Regular user account	
HamVisitor	HVisitor	Guest	Note	Read only access to contact	
SallyVolunteer	SVolunteer	Volunteer	Volunteer	Volunteer account	

Below the table are two buttons: "Add new user account" and "Logout/Login". At the bottom right are "Main" and "Help" buttons. The status bar at the bottom shows "100" and "for Help, press F1".

Add New User



The screenshot shows a window titled "Add / Setup New User". On the left is a vertical toolbar with "OK" and "Cancel" buttons. The main area has several sections:

- Login:** Fields for "Login" and "Password".
- Privilege Level:** A dropdown menu.
- Permissions:** A list of checkboxes for various permissions:
 - See Recent Entries
 - See Log Entry details
 - See Payment detail
 - Add Contacts
 - Add Log Entries
 - Edit Address
 - Run Reports
- Email Settings:** Sub-sections for POP (receiving mail) and SMTP (sending mail). Each section has fields for Host URL, Login/Username, Password, and EmailFooter.
- Authentication:** Sub-sections for POP and SMTP, each with a dropdown menu for Authentication.
- Alternate method for sending mail:** A checkbox for "Pass single e-mail messages to default e-mail software" .

At the bottom right are "Main" and "Help" buttons. The status bar at the bottom shows "100" and "for Help, press F1".

When adding a new user, you can assign a login name and password, assign privilege levels, and establish a user's email settings for sending and receiving email in ebase.

You can also set a default code that each user is most likely to use when adding log entries about contacts. For example, you might set a membership payment code as the default for Victor Volunteer, who comes in each afternoon to enter membership payments.

NOTE: In addition to assigning a privilege level to each user account as outlined in this help topic, you can also customize user access to ebase functions and data in several different ways:

- Select which user privilege levels can edit contact records.
- Select which menus are accessible to each privilege level.
- Choose whether each individual user may see the data in the Recent Entries list on the Individual Overview screen.
- Choose to hide specific codes from the Recent Entries portal by selecting the "Hide from Public Hx" box.

Steps:

1. Click on ADMIN>Users>"Add new user account" button.
2. Enter data for the new user in these fields:
 - Set LoginID
 - Set LoginPassword
 - Set LoginPrivilegeLevel
 - Set Name of User
 - User Note
3. Enter the appropriate email settings for the user in the seven fields at the bottom of the screen. (See help topic "Email Settings for User Accounts" for more information.)
4. Click the "Add" button to the left of the "Default Code" field.
NOTE: Do this only after you have set up your code system (see help topic "Design Your Code Set").
5. Click on "Edit" to go to the screen that will allow you to set the default Log Code Click on the class from which you want to select the default code.
6. In the data display area in the middle, click on the code title (in blue and underlined) to select that code as the default code. You will be taken to the ebase user list. Click on the user name you just created to edit it further.

Deleting user records

Change or Delete User

User ID: NOVGX72P

Login: Visitor	Password: Visitor	Privilege Level: Guest
Name of User: Visitor		
UserNote: Read only access to contact records; limited set of navigation menus. No e-mail.		
Permissions <input type="checkbox"/> See Recent Entries <input type="checkbox"/> See Log Entry details <input type="checkbox"/> See Payment detail <input type="checkbox"/> Add Contacts <input type="checkbox"/> Add Log Entries <input type="checkbox"/> Edit Address <input type="checkbox"/> Run Reports		
Edit Default Log Code: Note		
Email Settings		
POP (receiving mail)	Authentication	SMTP (sending mail)
Host URL		Host URL
Login/Username		Login/Username
Password		Password
EmailFooter		Reply-to Address
VOLUNTEER		
Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software		
Delete Main Help		

Deleting a user will delete the entire user record. There is no recovery. If you delete a user record by accident, you will need to re-create the user record using the "Add new user" button.

If you do not have administrator privileges, you will not be able to delete a user record. This is to prevent unauthorized deletion of user records.

NOTE: Although deleting a user record deletes that user, any data already entered in ebase by that user is kept. Thus, when viewing an entry added by a deleted user, you will see the deleted user in the "Add by" field.

CAUTION: Do not delete users with access to admin levels unless you have another administrator account you can log in with.

Steps:

1. Click on ADMIN>Users.
2. Click on the name of the user you want to delete.
3. Click the trash can icon on the bottom right to delete the user.
4. Confirm the deletion. You will be brought back to the User List screen.

Change user passwords

Changing user account passwords is easily accomplished in ebase, using the ADMIN>Users entry on the navigation bar.

Passwords are not encrypted in ebase.

CAUTION: It's a good idea to backup your database before making major changes such as password changes. This way, if the password is misplaced, you can recover from the backup and access the data using the old password..

Default Codes for User Accounts

To speed up the data entry process, you can set up a default code for each user. The default should be the code title that each user is most likely to use when adding entries to contacts.

A user can, of course, select a code other than the default. If the user selects a different code when adding an entry, ebase will remember this more recent code and suggest it the next time the user adds an entry. However, each time you login for a new session, ebase will use the original default code set up in your user account.

NOTE: Before selecting default codes for user accounts, you will need to set up your codes.

Steps:

1. Click on ADMIN>Users to go to the ebase User List screen.
2. In the "Name of User" column, click on the name of the account you want to edit.
3. Note the value displayed to the right of the "Default Code" label. Continue if you wish to choose as default some other code.
4. Click the "Edit" button to the left of the "Default Log Code" field.
5. From the drop-down list, select the appropriate Class for which you want to add the default code.
6. In the data display area in the middle, click on the code title (in blue and underlined) to select that code as your default.
7. You will be returned to the User List screen. Click "ADMIN" to return to the Admin Main Menu.

Email Settings for User Accounts

To use ebase's email functions, you will need a connection to the Internet and accounts on SMTP (outgoing) and POP3 (incoming) mail servers.

Each ebase user has their own email settings. You need not give all users the power to send and/or receive email.

Before you set up a user's email function, you should carefully consider which email account the user should use. ebase's email functions were designed to maintain organizational "role" accounts, not personal email accounts.

For example, many organizations have an email account like: **info@ebase.org**

In this example, the email account is an auto-responder sometimes and is handled by different people at other times—it doesn't go to a single staff member's email box.

ebase can, and should be used to, track "organizational"--as opposed to personal--email correspondence. As such it is strongly recommended that you not use personal email accounts in ebase. Otherwise there is a strong chance that personal email will get stored in a way that is viewable by everyone in your organization. See the chapter on ebase email functions for more detail on this issue.

CAUTION: It is recommended that you use a DIFFERENT user name and password for ebase email from the one(s) you use for all other email. When ebase downloads messages from the incoming mail server, it will download ALL email addressed to the user name that you set up in ebase. Unless you want to manage all your email correspondence from ebase, you will need a different user name and password for ebase email. Consider using an email address associated with a role instead of a personal email address, such as "training@genericnonprofit.org" or "advocacy@genericnonprofit.org."

Steps:

1. To edit each user's email settings, go to ADMIN>Users.
2. Click in the "Name of User" column on the user account that you want to edit.
NOTE: After you change a user's email settings, you must logout and login again for the changes to take effect.
3. Enter the email login account name "Email Login Username" field. This is sometimes different from the user's email address. Check your email account settings to be sure.
4. Enter the login account's email password in the "EmailPassword" field. These values identify and allow access to your account on your POP3 and SMTP mail servers.
5. Enter your email address in the "EmailAddress" field.
6. Enter the address of your POP3 server in the "EmailPOPHost" field. Typically this will be in the following format: "mail.[MailHost name].com."
7. Enter the Internet address of your SMTP server in the "EmailSMTPHost" field. Typically this will be in the following format: "smtp.[MailHost name].com."
8. In the "EmailPOPAutentication" field, leave the setting to "off" unless your mail host specifies uses the APOP authentication protocol. If your host uses APOP (which encrypts your password as it gets sent to your mail host), then choose "On".
9. In the "EmailSMTPAuthentication" field, choose your SMTP authentication settings. Most hosts do not use authentication, but this is changing. There are many methods used for SMTP authentication, the most common being "Login" (which requires a users to login to their POP3 account before sending-relaying-email through their SMTP server). See the section on email for more details on SMTP authentication.
10. In the "EmailFooter" field, enter the text that you want to appear below the body text of every message sent by this user. If ebase appends additional information on how a recipient can unsubscribe from a mailing list, it appears below this footer text.

Error: "Please see your friendly local ebase Administrator"

If a user who does not have admin privilege levels clicks on the "ADMIN" menu entry, they will receive this error message.

To allow a user to have access to the Admin menu, you need to login as an administrator, go to that user and set their privilege level to "Admin".

If you accidentally disabled admin access for all logins and cannot access the admin menu, you should revert back to an older copy of your database--before you changed the passwords. If you don't have a backup, or if you have entered extensive information in ebase since your last backup, you can export user data from the Main.200 file, modify it so that one user has admin access and then re-import the data.

VALUE LISTS

ebase uses two types of value lists to provide "picklists" to enter data in fields.

1. **Automatic:** these value lists are maintained invisibly by normal data entry and their structure resides in the local database and field. Some of these "automatic" value list

values are fixed and can't be changed. Others are user definable; you'll see an "Other..." value at the bottom of the list if they are.

2. **User definable:** These are value lists that may be used throughout ebase (i.e. are available in a number of databases), but are user-definable in a single location. That is, you can define these types of value lists in one location in ebase and have them reflected in the various databases that make up ebase.

The data for user definable value lists is stored in the Vlists.200 file. This file is used to store values used in pull-down value lists throughout the various ebase files. Use of this process allows user set values to be readily transferred to updated future versions of ebase and to maintain the ebase version upgrade path.

If you would like to change a user definable value list that is resident in Vlist, you'll need to use ADMIN>Value Lists.

The Menu detail for the value list entry has three alterable fields, the List Name which shows the name of the List the value will appear on, the value, and a note field for a documentation comment if needed.

While list changing values or deleting values is a good way to customize your value lists deleting or changing List names is not recommended and may make certain data fields unusable or highly confusing to end-users.

CAUTION: Do not change a value list entry name. This will cause pull down lists using that value list name to fail. Developers who wish to create new value lists for use in custom modules are advised to ADD a value list record, then add supporting fields and other modifications to Vlist.200 (there are more details on this process in the Developers appendix). Before making any changes to your value lists, you should back up ebase and be sure you have an understanding of how editing menus works. Again editing value lists in your database incorrectly can cause pull down lists to fail.

Steps:

1. To edit Value List entries, Click on ADMIN>Value Lists
2. Choose the value list you wish to work in from the List pull-down menu.
3. In the "Value List Item" column, click on the name of the entry you want to edit.
4. Edit the list entry Value.
5. Press OK to return to the list view.

REVIEW DELETIONS

When a user "deletes" a contact, she is really only marking it for someone to review before deleting it. Part of a DBA's job is to routinely delete and archive unneeded data. The ADMIN>Review Deletions function quickly locates records that have been marked for deletion, and presents them for you to review and either delete (if appropriate) or restore.

Why is this necessary?

In some organizations, the people who process returned mail may not be as sensitive to a member's status within your organization as you or your development director. ebase lets a user mark a record for deletion, then asks to give a reason for deletion. Then, when a DBA scrolls through the list of records marked for deletion, she can decide whether or not to actually delete the records. Alternatively, she can "restore" the records and tag them for further research (if necessary).

NOTE: This same function is included as part of the CONTACT>Overview>TOOLS menu.

MAINTENANCE SCRIPTS

The screenshot shows a software application window titled "Maintenance Scripts". On the left, there's a vertical toolbar with a "Admin" button. The main area contains a list of maintenance scripts with their descriptions:

- Fix ContactName**: This script rebuilds the ContactName field in Contacts to ensure that finds and lookups that rely on ContactName work correctly. This may take a while to run if you have a lot of records in Contacts.
- Fix Contact and Address Dup checking information**: This script rebuilds the Contact and Address duplicate checking information. It is the same script run whenever you change any of the settings on the dedup settings page. This may take a while to run if you have a lot of records in Contacts.
- Update Log and Update Fast Find fields**: This script should be run to rebuild the Fast Find fields in Contacts and Log. It should be run whenever Find operations in Contact and Log aren't returning expected results.
- Fix Code Flags**: Run this script after importing codes from a previous version of ebase or other source. It revises the values used in flag fields so that they conform with current practice.
- Delete orphaned records**: This script should be run whenever you want to clean unused ContactLocation and Location records from the Location file.
- Fix Report helper file IDs**: This script updates Reports, ContactReports and LogReports IDs. This may be needed after importing contact or log records.
- Update Seasonal addresses**: This script updates the dates used in seasonal address swapping for Reports. This may be needed before running some reports.

At the bottom right of the main area is a "View Developer Scripts" link. The bottom of the window has a toolbar with icons for "100", "Browse", and navigation arrows.

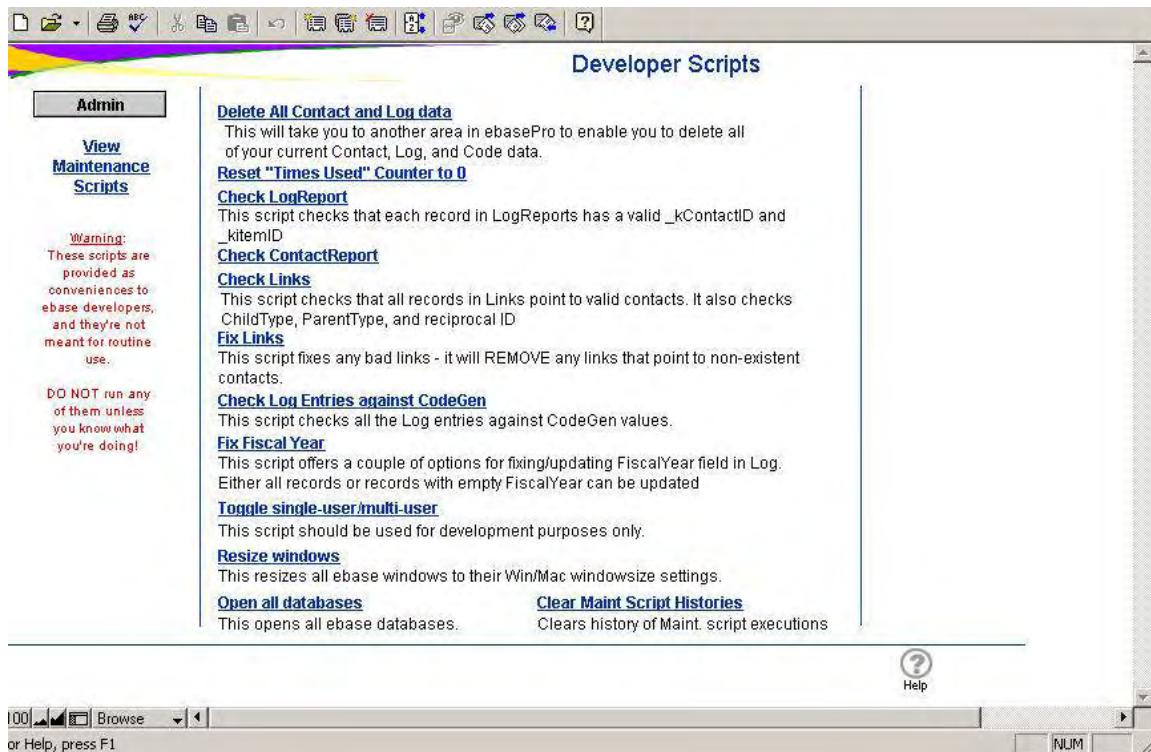
ADMIN>Maintenance Scripts provides a number of utility scripts that are used to rebuild and/or refresh aspects of ebase. After these scripts are run, the time and user is recorded. You can reset these times using a developer script (described below). Here's a listing of what these scripts do:

- **Fix ContactName:** This script rebuilds the ContactName field in Contacts to ensure that finds and lookups that rely on ContactName work correctly. This may take a while to run if you have a lot of records in Contacts.
- **Fix Contact and Address Dup checking information:** This script rebuilds the Contact and Address duplicate checking information. It is the same script run whenever you change any of the settings on the dedup settings page.
- **Update Log and Update Fast Find fields:** This script should be run whenever Find operations in Contact and Log aren't returning expected results. Rebuilds indexed "Fast Find" in Contacts and Log. This script can take a long time, but is significantly faster than in previous releases. The time is now mostly dependent on how many records have to be fixed, rather than on just the number of records. You can use some of the developer scripts to help tell if running this script is required.
- **Fix Code Flags:** Run this script after importing codes from a previous version of ebase or other source. It revises the values used in flag fields so that they conform with current practice.
- **Delete orphaned records:** This script should be run whenever you want to clean unused ContactLocation and Location records from the Location file. Orphaned records can be left as a result of a number of import and deletion operations and while they don't hurt your database, they clutter it up and make it run slower than it could.
- **Fix Report helper file ID's:** This script updates ContactReports and LogReports IDs. This may be needed after importing contact or log records.
- **Update Seasonal addresses:** This script updates the current primary contact location based on the seasonal address data already entered into the contact's

address record. Used to update "seasonal addresses" prior to running reports (for example, batches of mailing labels).

- **View Developer Scripts:** This button will bring up another set of scripts which are more for developers, but are all safe to run.

ADMIN>Maintenance Script>Developer Scripts provide a number of utility scripts that help developers and DBAs determine the state of their ebase data. Many of these scripts simply report inconsistencies that can be fixed using other scripts.



- **Delete All Contact and Log data** - This will take you to another area in ebasePro to enable you to delete all of your current Contact, Log and Code data." *USE THIS WITH EXTREME CARE!*
- **Reset "Times Used" Counter to 0:** This script resets the login counter to zero, which will trigger automatic presentation of the easy-start setup wizard on next login.
- **Check LogReport:** This script checks that each record in LogReports has a valid _kContactID and _kitemID.
- **Check Contact Report:** Checks if ContactReports.200 is properly up to date. This is much faster than rebuilding it.
- **Check Links:** Checks the Links.200 file to make sure that all links between Contact records are properly recorded.
- **Fix Links:** Fixes all Link.200 records. Be extremely careful when running this – it will DELETE link records whose Child or Parent contact record no longer exists. Other inconsistencies will be fixed.
- **Check Log Entries against CodeGen:** Checks if the Fast Find fields in Log entries are consistent with those in CodeGenerator.200. Note that this script just checks the Fast Find fields in Log.200, and not those in Contacts.200. Thus even if this script says that everything is up to date, it doesn't mean the 'Update code and Fast Find Fields' maintenance script doesn't have to be run.
- **Fix Fiscal Year:** This script offers a couple options to update the Fiscal Year fields in log entries. When the fiscal year setup information is changed, it does not change

any fiscal year information in existing log entries. This script can be used to force a recalculation of fiscal year for all log entries. It also can be used to fill in the Fiscal Year information for log entries that have blank Fiscal Year values (this can happen during import).

- **Toggle single user/multiuser:** This should be used for development testing only. It is NOT useful for setting up a multi-user ebase configuration.
- **Resize windows:** This resizes all ebase windows to their Win/Mac window size settings. Particularly useful for Macintosh users.
- **Open all databases:** This opens all ebase databases. Useful for developers.
- **Clear Maint Script Histories:** This script will simply clear the history of when the maintenance scripts were run. It is really only useful for developers that wish to provide a ‘clean’ new build.

Chapter 6 The ebase data structure.....	1
Why does ebase look so weird? How come it's not as simple as outlook?.....	1
Core database structure.....	2
ebase Navigation tables	5
Ebase Utility databases and tools	5

Chapter 6 The ebase data structure

WHY DOES EBASE LOOK SO WEIRD? HOW COME IT'S NOT AS SIMPLE AS OUTLOOK?

ebase is a collection of FileMaker Pro databases designed to store data about people. While this may seem like a simple task, when you break it down it gets quite complicated.

ebase is highly relational—it stores different kinds of data in different files. Data integration happens as a result of linking pieces of data together with common “keys.” When data is related and integrated it provides essential information that is used to support an organization’s cause, and it makes it easier for those who use the database to get their work done.

Why is ebase designed in this way?

ebase started, not as a programming project, but as a way to help organizations work more effectively in engaging their communities and constituents while fulfilling their mission goals.

ebase developers started with a certain set of assumptions about how organizations and their constituents should “ideally” work together. The ebase data structure evolved based on these assumptions.

The assumptions underpinning the ebase design are:

- People can be identified by many types of personal contact data: first name, nickname, last name, family name, email address, ID number, and so on. As long as you have one unique piece of data for each individual, you can create a contact record in ebase.
- You never know what you (or your co-workers) will learn about someone that will later turn out to be useful information: their interests, hobbies, skills, who they know, what they support financially, what makes them happiest, and so on. Often it’s the accumulation of insignificant pieces of information over time that provide a better picture of who a person is and how they might help your organization. Sometime your best members aren’t the ones who give the most money. Often they are the most active, or the most connected, or the most knowledgeable about your field.
- Being able to view the accumulation of your organization’s interactions with an individual over time, combined with what you know about their interests, will inform your approach to your next interaction with that person.
- Communicating with people is essential in bringing them together to work in “community”—that is—to work together to solve a common problem. One of the best ways to improve an organization’s standing with its constituents is to improve the quality of communication by continually examining the impact of various messages that are sent to the constituent and whether or not or how they respond to those messages.
- If you send a message to a group, you should be able to determine whether that message was effective (or at least establish effectiveness parameters). With the next

message you send, you should be able to improve on the effectiveness of your message. If you are unable to measure the impact of your messages, you're pretty much just guessing about how useful and therefore how important they are to your constituents.

For fans of philosophy, the structure of ebase is designed to capture the Self-Other dialectic as described by Emmanuel Levinas in his seminal work, "Totality and Infinity." In it, Levinas posits that we can only know other humans through our apparent transactions with them. Further complicating the picture, interactions look very different on each end of the conversation, depending on the perspective of the recipient. The derivation of meaning comes not from the content of a single transaction, but rather, from the fact that the conversation continues. But enough about Levinas...

Core database structure

For folks who only want to know how ebase works, ebase separates what we know about people into the following categories (files):

CONTACTS: Information about who a person is—name, basic demographics, biography. There are three contact “entity” types in ebase: individuals, families, and organizations.

LOCATIONS: A physical location. May be shared by contact entities (so you don’t have to enter the same address 5 separate times for members of the same family).

CONTACTLOCATIONS: Data about the places to contact a person as well as the roles a person plays when in a given location at any given time. For example, at home, Janice may be a volunteer; at work, she may be a development director.

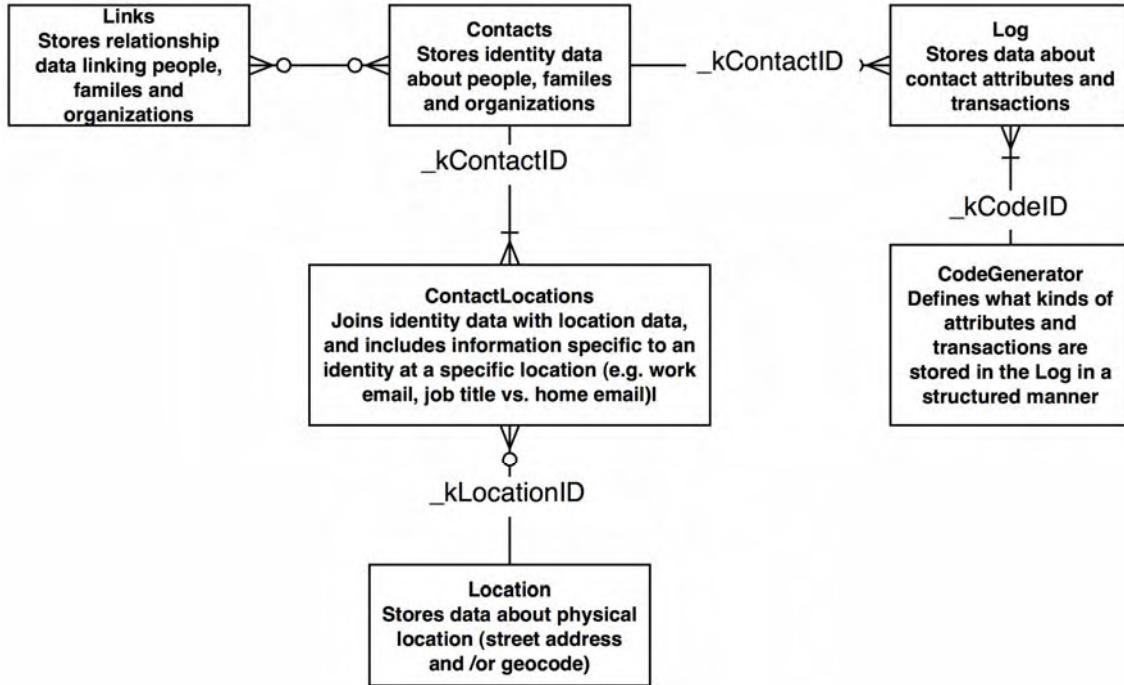
LINKS: Relationships between people.

LOG ENTRIES: Data that describes a person’s attributes, interests, skills, property, interactions...anything that could be “attached” to a person to help better understand. Log entries record the “back and forth” between the organization and constituents, the common work and mutual support, the shared knowledge—all the things that help strengthen your relationship with your constituents.

CODEGENERATOR: A tool to help define what kinds of information (data) you are interested in tracking about a person.

ebase uses relational database techniques to tie these basic types of data together to form a more complete picture of a person and their relationship(s) to your organization.

Here’s a top-level “entity-relationship” diagram of how ebase stores data:



ebase top-level entity relationship diagram

ebase lets you collect multiple addresses, roles, relationships, attributes, and transactions for each person. In fact, ebase is only limited by the capacity of your computer equipment as to how much detail it can gather about an individual and their relationships.

Data stored in **Contacts**, **Locations**, and **Links** describes the "basics" about a contact. In other words, data stored in **Contacts**, **Locations**, and **Links** has more to do with the *identity* of the contact than their relationship to your organization.

But that's not enough information to figure out how to approach a person to ask them to do something for you. That's where the Log comes in.

Data in the Log file describes the specifics of a contact's relationship to your organization. The Log file stores all "entries" related to a contact. Entries can be interests, payments, records of attending an event, email messages or transactions, or simply record that the contact was mailed something by your organization.

Why are these entries called a log?

When sailing vessels embarked on long "uncertain" journeys, the captain of the vessel is responsible for seeing that every detail about the journey is recorded in a "log book." This lets the captain refer back to events to determine how far the ship has come, how much of the journey remains ahead, where the ship is, whether or not the ship has the resources to continue the journey, and so on. Check out a ship's log. Often, it is a jumble of data that happens to be entered sequentially. To use it, you need to go back through it in sequence.

The ebase log is similar to a ship's log in that it gives your organization the ability to sequentially record data about all interactions with members. But unlike a ship's log, ebase allows you to extract only the data you need to answer specific questions without having to go back through each transaction sequentially.

Functional details about the primary ebase databases

CONTACTS: Joins the other tables using the key _kContactID. CONTACTS>Overview provides an interface to the relationship between people, families and organizations and the other data types.

LOCATIONS: The physical location of a contact entity. Locations may be referred to by multiple CoLo records. For example, in the case of a family: all share a single physical home address, but each may have different email addresses, work phones, and/or work addresses.

CONTACTLOCATIONS: A ContactLocation (CoLo) record “joins” Contact data with Location data. A Contact may have multiple CoLo records (Home, Office, Vacation). Each CoLo record records details about how to get hold of a Contact at a particular location (e.g. email address, phone).

LOG entries (Log entries are restricted by how they've been defined by CodeGenerator. Multiple log entries can be attached to each Contact. Log entries are not shared: each represents a single event or attribute experienced or assigned to a Contact.

CODEGENERATOR: As established by “you”, defines what kind of data can be tracked in ebase. CodeGenerator creates an 8-deep data structure, defined by “bucket” values, and identified by a unique code title and code description. Each code defines attributes shared by log entries that have been assigned that code. Issues potentially defined by a CodeGenerator record include: Is this a member payment? An email message? A Thank-You template? A skill? What forms are used to view and edit the data described by this code? Are there special attributes to this code that could cause related Log entries to pass information to external modules?

Codes are at the heart of ebase. More detail on setting up Codes can be found in the chapter about Log Entries.

LINKS: In practice, establishing links is pretty simple, but describing how they work in database terms can seem complicated. Links are a Contact to another Contact to show a specific relationship between them.

For example:

Jim Smith is Henry Smith's brother
Mary Nelson is Jim Smith's boss

There is (probably ☺) no relationship between Henry Smith and Mary Nelson, but they are both, in some way, related to Jim Smith

Each relationship can be named and described individually—or—users can select from already defined relationship types. When referring to relationships, ebase uses the term “parent/child”. When we talk about parent/child relationships, we're talking about which Contact spawned the relationship (or “owns” it), and which Contact is the target of the relationship. This can best be described in the form:

“Parent” is “Child” “RelationshipName”

e.g. Jim Smith (Parent) is Henry Smith's (Child) brother (RelationshipName)

Links in ebase can either describe one-way relationships, e.g.:

David is Erin's mentor

Or they can describe bi-directional relationships, e.g.:

Sam is Sarah's father
Sarah is Sam's daughter

ebase Navigation tables

There are a number of tables inside ebase that are used strictly to help you navigate between the various databases according to your user level:

Navigator: Stores information about the current ebase user and which screen they are viewing.
Acts as a navigational "switchboard" in conjunction with Menu.

ebase: Stores user permission data.

Main: Stores startup variables and variables that appear in EVERY table.

Menu: Stores menu entry records.

Lokey: Stores license information for proprietary plugins and your community membership registration code.

Reports: Stores data about reports and commands to inform particular reporting processes.

Ebase Utility databases and tools

There are a number of databases that help out with specific functions. These make up the majority of the databases you'll see inside the ebase folder. They roughly break down into the following categories:

Find helpers: These store data during the find process to allow users to merge the results of search operations in separate databases.

Report helpers: These files store data about data in Contacts and Log to make reporting tasks easier.

Import tools: The files allow you to upload data into ebase from other sources.

Archive files: These files store archival data (e.g. EmailArchive) or are used to move data from one version to another.

You can find a complete list of ebase databases and supplemental documents in the Developers section of this manual. Or, visit the Developer's area of the ebase community Web site, www.ebase.org.

Chapter 7 Contacts	1
The CONTACTS Overview Screen	3
Entering CONTACT data.....	3
Add Contact.....	3
Contact data types	4
Adding a group of family records by record replication	5
Avoiding duplicate contact and address records.....	6
Checking for duplicates when entering a new Contact record.....	6
Checking for duplicates "after the fact".....	8
Address and Locations: Introduction	11
Add Additional Addresses	11
Edit an Address or Location	12
Designate Primary Address.....	13
"Seasonal" Addresses	14
Add Log Entry: Introduction	15
Add a Log Entry:	16
Delete A Log Entry.....	17
Batch Entry of Log Data.....	17
Add Profile and Biographical Data.....	18
Demographic data.....	18
Biographical data	19
Creating and editing links	20
Marking and Deleting Contacts, Addresses, Links and Log Entries.....	22
Mark (Flag) a Contact for Deletion	22
Deleting an address.....	23
Marking a link for deletion	23
Mark a log entry for deletion.....	23
Deleting records marked for deletion	23

Chapter 7 Contacts

The Contacts database is at the heart of ebasePro. It stores data about your contacts as a starting point for tracking your relationship with them. ebasePro records three different types of contact "entities":

- Individual
- Family
- Organization

While these may seem similar, in practice they are distinct entities.

Individuals are people. They walk around, interact with other people, and do things in the world. It's pretty easy to characterize your relationship with people with a relatively high degree of certainty.

Families are groups of people organized around specific kinds of supporting relationships. Families are social constructs rather than physical beings. When you are dealing with an individual, there is little doubt about the nature of your relationship. When you deal with a family, your ability to characterize your relationship becomes a little less clear. Families don't have first names and often are associated with more than one last name. There typically is no legal name for a family. There are social constructs that help identify families, but often they are not readily apparent. Ask two different people the name of a family and you will often get two different answers. This can be a problem when you're trying to process a family membership check.

Organizations present even more of a challenge. Some organizations are legal entities (ebase.org), others not (the ebase developer's community). Organizations may be very hierarchical, or they may be loose coalitions. Some may have multiple contact people, while others have only a single point of contact. Organizations frequently have a legal name, and if not, they have a name that clearly identifies them.

Although it gets complicated (because people, families, and organizations ARE complicated), ebasePro provides tools to help you track your relationships with these different kinds of entities, all using the Contact database.

THE CONTACTS OVERVIEW SCREEN

The main place you interact with contact data is through the CONTACTS overview screen.

The screenshot shows the Individual Overview for Aaron Chumrau. The left sidebar contains a main menu with sections for CONTACTS, REPORTS, IMPORT, EMAIL, ADMIN, and QUIT. Under CONTACTS, links include QuickFind, Add Contact, Add Log Entry, List, Full History, Profile, Bios, Links, Find, Summary, Bend/Copy Info, and TOOLS. The main content area displays contact details for Aaron Chumrau, including address, phone numbers, email, and community links. A log of recent activity is shown at the bottom. The bottom navigation bar includes buttons for First, Back, Next, Last, and various search and print functions.

The CONTACTS overview screen

The overview screen displays a summary of the data your organization has collected for a contact. The screen header will display whether the contact is recorded as an individual, a family, or an organization.

To edit a contact record's name or address, simply click on it. If your user account has permission, you will be able to edit that particular piece of data.

NOTE: Data that is underlined is actionable in ebase. It behaves like a hyperlink on a web page—click on it and something happens. Data colored blue (but not underlined) indicates your current location or activity. You can easily determine where you are in ebasePro by looking at the left navigation bar (navbar) menu—the word in blue indicates your location.

ENTERING CONTACT DATA

Add Contact

Adding a contact involves entering name, address, organizational, email and phone data, after first checking to see if the name has already been entered in ebase ("duplicate-checking" or dup checking—see below). The "Add Contact" link under "CONTACTS" in the left navbar initiates the process for adding a new contact.

ebase allows you to add three types of contacts: an individual, a family, or an organization. As you enter the contact's name and address, ebase identifies any potential duplicates and allows you to cancel the process if necessary.

NOTE: For details on configuring the data entry dupcheck process, see "Checking For Duplicates When Entering A New Contact Record" below.

Steps:

On the left navigation bar, click on CONTACTS>Add Contact.

1. ebase will ask you what type of contact you want to add—an organization, family or individual. Choose the appropriate type of contact.
2. Enter the appropriate data in the contact name field(s). Use your tab key to move between name fields when entering name data. After you have entered name data, hit tab again and ebase will check for duplicates. You can also, click "Check for Duplicates" to have ebase check for names already in ebase that appear to match the new name you've entered. If ebase finds duplicates of the name you're entering, you have three choices:
 - a. Click on the duplicate that appears in the Possible Duplicates list to abort the "add contact" process and display the Contact you clicked on, or
 - b. "Cancel" to back out of the Add Contact process altogether, or
 - c. Click "OK" to create a new Contact record using the name you entered and proceed to entering address data.
- If there are no duplicates, click the "OK" button to create a new ebase Contact with the name you've just entered. If there are duplicates, see the section "Avoiding duplicates" below.
3. If you have a mailing address for your contact, enter it in the "Delivery Address" field. Do not enter city and state information at this point. Hit tab once you have entered your address data or click "Check for Duplicates" to have ebase check for existing Contacts with a similar mailing address. If ebase finds one or more similar addresses, you have three options:
 - a. Click "Don't Add an Address" to abort creating an address record and view your new contact on the overview screen (the contact will be created with no associated address)
 - b. Click on a duplicate address to attach it to your new Contact record (see the section on shared addresses for more on how to decide if this is the best option).
 - c. Click the "Add New Address" button to ignore the duplicate(s) and create a new address record attached to your new Contact record.
4. You may now add the rest of the information for the contact.

CONTACT DATA TYPES

ebase stores information about people and groups that work with your organization. Users may add or edit this information, run reports using this information or take actions on this information (for instance, send an email to all people who are interested in volunteering).

ebase allows you to store many different types of data about each contact. The data will vary slightly depending on whether the contact is an individual, a family or an organization.

For each contact, you can record the following types of information:

- **ContactLocation** – Contact Location record(s) include information like delivery address, email address, web page, phone and fax numbers, time zone and preferred greeting and salutation. You are able to give each location a unique name (such as "Home" or "Office" to make it easier to distinguish them. To view or edit a Contact Location record, click on the name/address area in the upper left on the CONTACTS Overview screen (this will allow you to edit the primary contact location for this

- contact). If you want to edit another contact location record (not the primary), click on one of the "Other Address(es)" directly below the name/address area.
- **Address** -This refers to the delivery address, supplementary address, city, state zip only and is really a subset of location. A location can store only one address, but no contact record is required to have an address. You may remove addresses from locations and add another later. Addresses may be shared among contacts.
 - **Profile** -This contains demographic information such as gender, occupation, senate district, education. To view or edit a contact's Profile, click on CONTACTS>Profile on the left navigation bar.
 - **Biography** (Bios)-This contains room for a short biography, a long biography and a photo. To view or edit a contact's Biography, click on CONTACTS>Bios on the left navigation bar.
 - **Links** - You may create relationships between records using CONTACTS>Links on the left navigation bar. You may use the preset types of links (employee, employer, member of household, family) or you may create a custom link. To view or edit a contacts relationships (or links), click on CONTACTS>Links on the left navigation bar.
 - **Log entries** -Log entries are records—stored in the LOG database—used to track actions, interests, communications, and payments that relate to that contact. For example, you may have an entry named "Interest in volunteering" that you use to record a contact's interest in volunteering. Or you may have an entry named "Sent Newsletter Nov 2001" for all contacts that received the November 2001 newsletter.

NOTE: If you have the relevant User privileges, you may view all log entries for a contact on the History screen (CONTACTS>Full History).

ADDING A GROUP OF FAMILY RECORDS BY RECORD REPLICATION

The easiest way to enter a group of family contacts is to start by creating the family record first, then replicate the family record contact data, and add the names of the individual family members to the replicated record(s). The end result is one Family record and two or more Individual records linked together and sharing the address information.

ebasePro makes this easier using the "Create Related Record" process, located in the TOOLS submenu. (This is really quite the neat feature!)

Steps:

1. First, click on Add Contact and create a family record, entering all the relevant data for the family.
2. Then, click on CONTACTS>TOOLS>Create>Related Indiv.
3. You will be asked if you want to create a new individual record based on the current record. Click on Yes to continue.
4. You will be prompted to enter a name in the dup check screen. Enter the name and click on "check for duplicates". If no potential duplicate names are listed, go to step 5. If there are duplicates, see section "Avoiding duplicate records" below.
5. Click OK.
6. You will then be asked to describe your new contacts relationship to the original family. Describe it, then click OK.
7. Next, you will then be asked to describe the family's relationship to the new contact. Describe it.
8. Click OK and you're done. The Family records is replicated (not copied, because that would cause quite a few problems, notably it would duplicate the _kContactID field and that would lead to inaccurate reports) and turned into an individual contact record. The fact that it was replicated is noted in the new contact record's "Note" field.

9. Add additional family members by following Steps 2-8 above.

NOTE: Be sure to return to the family record before creating the additional family members or you will be creating a relationship between two individuals and not between family and individual.

AVOIDING DUPLICATE CONTACT AND ADDRESS RECORDS

ebase helps you check for duplicate names and addresses in three ways:

- when you enter a new contact
- when you search Contacts for apparent duplicates (checking “after the fact”)
- when you use the “Omit Location Dups” feature

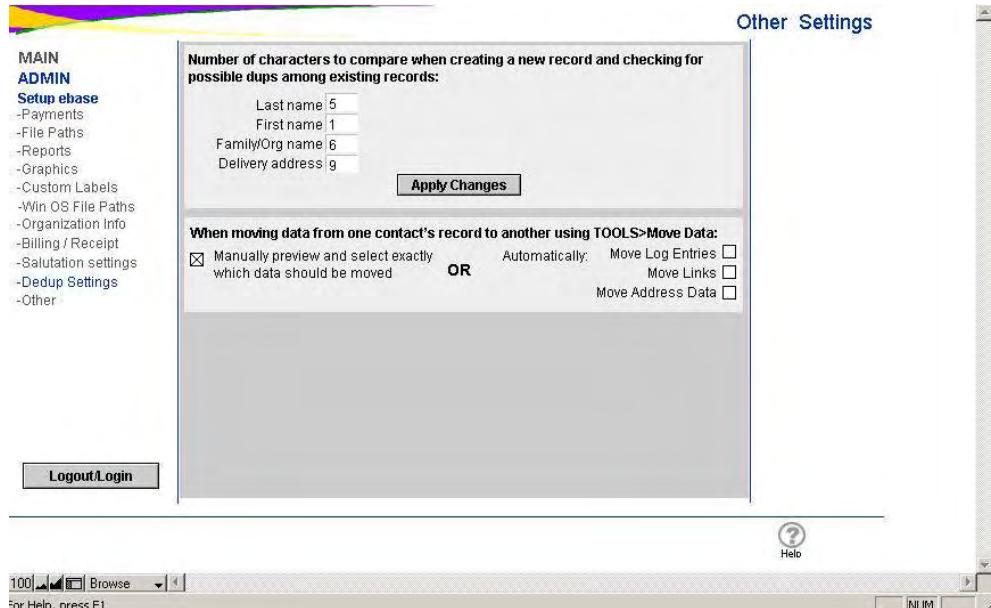
The duplicate checking function compares fragments of the name and address fields in an effort to catch records that are duplicate, but not necessarily identical. This is a somewhat crude but effective way to quickly scan your list for potential duplicates. (There is a committee of ebase developers working on a better dup checking algorithm. If you'd like to participate in the discussions about how to create a better dup checking method, consider joining the ebase developers community.)

NOTE: When looking for duplicates ebase is not case sensitive. It also ignores “PO Box” and similar phrases in addresses.

Checking for duplicates when entering a new Contact record

Prior to ebasePro 2.20, new name and address data was compared *exactly* to existing CONTACTS data to look for apparent duplicates.

In ebasePro 2.20 and later versions, a more flexible duplicate comparison is possible. This feature can be partially configured for adding new users by going to ADMIN>Setup ebase>Dedup settings.



The settings above will result in the following process for data entry dupcheck:

Deleted: <sp>

First, the **name** that is entered is compared against names already in ebase as follows:

- When new Individual records are added, the first letter of the first name and the first 5 letters of the last name will be compared to existing Contacts. For example, an existing record for Ben Johnstone will be identified as an apparent duplicate for a new record "Benjamin Johnstone," and also for a new record "Benny Johnson," because all three have first names that start with "B" and "Johns" as the first 5 characters of the last name.
- When new Family records are added, the first 10 letters of the household name AND the first 10 units of the delivery address will be compared with existing household names in ebase
- So it's a good idea to be consistent with your family naming conventions; don't use "The Smith Family" for some families and "John and Mary Jones" for others, or if you do, don't expect dupe checking to catch similar family names.
- When new Organization records are added, the dupcheck process compares what you enter in the name field against the first 10 letters AND the first 10 units of the delivery address of organization names already in ebase.

For example: suppose the "Dept. of Transportation" and the "Dept. of Neighborhood and Community" are already present in ebase. If you want to add the "Dept. of Public Works" and you type "Dept" in the name box, both of the above records will show up as possible duplicates because both have the word "Dept" in them. If you want to add the "Community Church of Vermont" and you enter "Community" in the name box, only the Dept of Neighborhood and Community will show up as a possible duplicate because only it contains the word "Community".

TIP: The less specific you are, the more likely it is that the list of possible duplicates will be longer. Conversely, the more specific you are, the more likely it is that the list of possible duplicates will be shorter. You will have to use your judgement here: on the one hand, you don't want to clutter your database with duplicate information. On the other hand, you don't want to have to examine hundreds of records to determine if the record you are about to add is a dup. Entering the most distinctive word in the name, especially for organizations, may be your best bet.

Next, the **address** that is entered is compared against addresses already in ebase as follows:

- When a new address record is being created, ebase will compare the first 9 characters with the first 9 characters of every delivery address already in ebase. For example, entering "34129 NE Schuyler Avenue" will match addresses in the database such as "34129 NE Schuyler Street" (probably a duplicate) and "34129 NE School Blvd." (an unlikely coincidence!).

NOTE: You can edit the settings for the dupcheck feature to make the "best fit" for your organization. If you do, be sure to click "Apply changes" to implement your new settings.

Checking for duplicates “after the fact”

Even though ebase requires a duplicate checking step before data is entered using “Add Contact”, duplicate contact records may still make it into your database.

There are two ways of searching out these duplicates:

Use the Find function to seek out contacts with similar names

Steps:

Creating a found set of all records with duplicate Contact names.

1. Click on CONTACTS->Find and choose a Contacts search.
2. If prompted to work with the current found set or not, choose "New Find".
3. In the "Contact Name" field enter an exclamation point (!). Click "Find".
4. You will see a list of all contact records that share the same Contact Name.

NOTE: Note that the duplicates are not marked—you will need to run through this list by hand or perform additional finds on this list to determine which of the duplicate records are valid and which should be deleted.

Using the DupCheck tool

In the Tools menu area, ebase has a primitive duplicate checking feature that allows Admin level users to obtain results in a slightly different way. When you use the tool, ebase will:

- Quickly search Contacts for duplicate records.
- Show the possible duplicates in a list.
- Allows the user to move between two possible duplicates and mark one as “Not a dupe” OR transfer the log entries contained in one record to the other record and mark the “bad” record for deletion.

PLEASE NOTE: The dupcheck routine for pre-existing records works a bit differently from the one that is used to check for duplicates when adding a new record. The "after the fact" routine uses the dedup settings that are specified in Admin>Setup ebase>dedup settings to compare the name, but it does NOT do a comparison of the delivery address. Instead, it compares the 1st 4 characters of the city and the 1st 4 characters of the zip code against what you enter in those fields. However, records marked as being "Not a Dup" are excluded from the entire process.

The screenshot displays the Individual Overview for Aaron Chumrau. Key details shown include:

- CONTACTS:** Aaron Chumrau, 116 Cardinal Street, Springfield, IL 62746
- Phone:** (111) 6234567
- Email:** aaron@xyz.com
- Community Links:** Chumrau Family
- Recent Log Entries:**

Add	Recent log entries (7 total)	Amount	Posted	Description	DEL
	Assisted with Gala02		8/31/06	Assisted with Gala02	DEL
	Major donor METAFLAG		8/19/06	Major donor METAFLAG	DEL
	Renewal email		5/30/06	This code contains the standard	DEL
	Payment on Pledge	\$150.00	1/2/06	Payment on Pledge	DEL
	Pledge Building Fund	\$500.00	1/2/06	Pledge for Building Fund	DEL
	Mbr renewal thank you ltr		9/1/05	Mbr renewal thank you ltr	DEL
	Newsletter sent		8/30/06	Newsletter sent	DEL
- Note:** aaron@xyz.com
- Metadata entries:** Major donor METAFLAG

Steps:

The Dup Check tool is listed under the TOOLS submenu.

1. Go to CONTACTS>TOOLS>Toggle Admin Fields. Two new "flag" fields will appear on the lower right-hand portion of the overview screen for the current contact record: Not a Dup and Select.
 - a. "Not a dup" is used to mark records that are clearly not a duplicate. These records are omitted from the next search for duplicate records.
 - b. The "Select field" is used to mark Contact records for idiosyncratic finds. This is discussed further in the section on Finds.
 - c. To hide these fields, simply click on CONTACTS>TOOLS>Toggle Admin Fields to "toggle" the fields back into not showing.

MAIN MENU

CONTACTS

- Enhanced Data

TOOLS

- Export from Contacts
- Sort Contacts
- Show Omitted
- CREATE
- Related Indiv
- Related Family
- Related Org.
- DUP CHECK
- Transfer Entries
- Omit Location Dups
- Omit Email Dups
- MOVE DATA
- Delete Found Set
- REVIEW DELETIONS
- Toggle Admin Fields

ADMIN

Individual Overview for Aaron Chumrau

Aaron Chumrau
116 Cardinal Street
Springfield, IL 62746

Phone: (111) 6234567

Do Not Contact:
Prefers Contact By: mail
Contact During: day

Other Address(es): Add New Address
Office: No postal address specified echumrau@xyz.net
No postal address specified

Other Phone(s):
Office: (No phone at this location)

aaron@xyz.com

Community Links (1)
Chumrau Family

Recent log entries (7 total)

	Amount	Posted	Description	DEL
Assisted with Gala02		8/31/06	Assisted with Gala02	<input type="button" value="DEL"/>
Major donor METAFLAG		8/19/06	Major donor METAFLAG	<input type="button" value="DEL"/>
Renewal email		5/30/06	This code contains the standard	<input type="button" value="DEL"/>
Payment on Pledge	\$150.00	1/2/06	Payment on Pledge	<input type="button" value="DEL"/>
Pledge Building Fund	\$600.00	1/2/06	Pledge for Building Fund	<input type="button" value="DEL"/>
Mbr renewal thank you ltr		9/1/06	Mbr renewal thank you ltr	<input type="button" value="DEL"/>
Newsletter sent		8/30/05	Newsletter sent	<input type="button" value="DEL"/>

Last Payment Date: 1/2/2006
Last Payment Amt \$: 150
Last Pledge Date: 1/2/2006
Last Pledge Amt \$ 600

Metadata entries:
Major donor METAFLAG:

Record 1 of 3 in found set.

First Back Next Last

Contacts List Find Find All Print Delete Main Help Not A Dup Select

100| Browse | For Help, press F1 NUM

Admin fields displayed at the far lower right of the screen.

2. Click on CONTACTS>TOOLS>Dup Check. This will run the dup check search and will produce a list of possible duplicate contact records.
3. Click on the first duplicate on the list to look at the record details.
4. Click on the "Next Record" icon at the bottom of the overview screen to go to the next record on the list.
5. Decide which record is the duplicate you want to delete.
6. If the duplicate you want to delete has entries attached to it, then you must decide if you want to transfer some or all the log entries:
 - If you don't want to transfer all the entries, delete the entries you don't want to transfer by clicking on "DEL" next to the entry title in the Entry Portal.
 - If you want to transfer the remaining entries, click on TOOLS>Transfer Entries. The Transfer Entries command will look through the database for possible dups, and display a list of possible "target" records.
 - The original record is called the "source".
7. Click on the "target" record that you want to transfer the entries TO.
8. You will be asked if you want to mark the original for deletion. Click on "yes" if you do or "No Thanks" if you don't. Either way, the log entries will be transferred to the target record and the target record will be displayed. If you chose the option to delete the original record, when you run the Dup Check again, you'll see that it has been flagged for deletion.

As you work your way down the list, you'll note that records flagged for deletion have red highlighting and a message at the top of the screen that indicates that the record has been flagged for deletion. To actually delete these records, you will need to use the Review Deletion functions in CONTACTS>TOOLS or in ADMIN>Review Deletions. (These both take you to the same place. It's included in CONTACTS>TOOLS simply for convenience.)

NOTE: Transfer Entries and MOVE DATA do not do the same thing. Transfer Entries only transfers Log entries and only to potential duplicate records. In addition to the transfer of Log entries, MOVE DATA can transfer much more data (such as links, addresses and selected log entries) and from any record to any other record.

ADDRESS AND LOCATIONS: INTRODUCTION

When you first add a contact, you are asked to enter a postal (delivery) address.

If you add a postal address it becomes by default the primary address. The primary address is used for most reports, like labels. You chose a location type (usually this is Home or Office) to define what type (or where) this address is.

The term "address" is used in ebase to mean any method of communicating with the person, whether it be though letters, electronically, by telephone, etc. "Postal address" will be used to indicate a physical location – home, workplace, etc.

All address information is stored in a "location record" that is associated with that contact. The location record contains information on how to contact the person: postal addresses, phone numbers, email addresses, Web site url and several other entries that relate to the contact. You may also add additional addresses to a contact (for office, cabin, etc.).

You may also add a contact without specifying an address. When you do so, ebase will display the following in the place where the address would normally be: "No postal address specified". This lets you know that not entering an address was intentional and not just an oversight..

Each additional address can also be named. The address name and the city/state show up on the overview screen. You can click on the name for more detailed information about the address. The default name for a new location is "New." Alternative names include Home, Office, Spring, Summer, Fall, Winter. You may also create custom names for addresses.

You may edit the information contained within an address at any time (assuming you have the appropriate user privileges).

Contacts may share an address. In this case, you can edit the address for one contact and the changes will be reflected in all contacts that share that address. If you only want to change the address for one contact instead of for all the contacts linked to the shared address, you will have to follow special steps (see example two below under "Edit an Address or Location").

There should be a set of data entry standards to make certain that all data entry follows the same rules and thus ensures the highest data integrity. See the chapter entitled "Administrator Tips" for further suggestions.

ADD ADDITIONAL ADDRESSES

The blue "Add New Address" button on the overview screen allows you to add an additional address for a contact: postal addresses, email addresses, telephone, and fax numbers. When you have multiple addresses associated with a contact, you can also use this link to designate the primary address, so that contacts receive communications at their preferred address.

Underneath the contact name and primary address you will find the "Other Address(es)" box, which contains a list of alternative addresses. Click the "Add New Address" button in the "Other Address(es)" section to add a new address.

Steps:

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

NOTE: Each address entry contains both email and postal addresses. If you want to add an additional email addresses you will need to go through the full address entry process for each new email.

EDIT AN ADDRESS OR LOCATION

ebase allows you to edit an existing address once you have added it to an individual, family, or organization record. The overview screen shows the contact's name and primary address at the top left. Edit this address by clicking on the primary address.

Contacts can have multiple addresses. You can have a home address, a work phone number, a cabin address and a ubiquitous email. Underneath each contact's name and primary address you will find the "Other Address(es)" box, which contains a list of alternative contact information. Click the city and state for the address you want to edit. This will take you to the Edit Address Information screen.

On the overview screen under the "Other Address(es)" section is a field for an email address and a field for a web page url. You may edit these by clicking the blue "Edit" buttons located next to the fields. If you click on the email address, ebase will ask if you want to send an email to that address.

The Edit Address Information screen allows you to edit all parts of an address: location name, delivery address, phone, fax, email, and web page url. You may also edit a contact's name on this page. If the address is shared with another record, there will be a note in the metadata area at the upper right of the screen that states: "This address is shared. Any changes made here will affect all Contacts who share this address:" (A list of names of Contacts who share this address follows.)

CAUTION: If you are editing a shared address, it will be edited for all contacts that share that address. If you do not want to edit it for all contacts, *remove the address from the particular record*, then add a new address to it. This will prevent other contact records that share the address from being altered. See Example two below.

Steps:

EXAMPLE ONE: Edit an existing address.

1. First, make sure you are viewing the contact record you want to work with on the overview screen. (CONTACTS overview)
2. Click the address you would like to edit. To edit the primary address, click on it at the top of the overview screen. If you would like to edit an alternative address, click on it in the "Other Address(es)" field. You may need to scroll to view all alternative addresses. To edit an email address or web page url, click the "Edit" button located next to that field.
3. Enter your edits in the appropriate fields and click "OK" when done. If you want to make this address the new primary address, make sure the "Make Primary Address?" box at the top left has an x in it.

EXAMPLE TWO: Edit a Shared Location

1. First, make sure you are viewing the contact record you want to work with on the overview screen. (CONTACTS overview)
2. Click on the address that you want to edit.
3. On the Edit Address Info screen, note that it states, "This address is shared" next to the "Location" field.
4. If you want to edit this address for all entries that share it, edit as in Example One above and you are done. (For example, a household may change its postal address and you want to change it for all members of that household.) Otherwise, go to Step 5.
5. If you want to edit the address for only this contact and you don't want to change it for all other contacts, you need to remove the address and then add a new one to the location record. Click the "yes" box in the lower left of the screen to "Remove address from this record. **Note** that this removes only the postal address, not the entire location entry.
6. You will be returned to the overview screen. Note that the address information for the contact has been removed. Click on the address to go back to the Edit Address Info screen.
7. There is now a blue button at the bottom of the location called "Add Address." Click on it to add a new address to the location record.

DESIGNATE PRIMARY ADDRESS

You can edit any one of a contact's multiple addresses to designate it as the primary address. ebase directs all communications to the primary address.

The first address you enter is, by default, the primary address. If the primary address changes, as when a contact moves from a summer to winter residence, it's easy to change the primary address designation.

The overview screen shows the contact name and primary address at the top left. Underneath the contact name and primary address you will find the "Other Address(es)" box, which contains a list of alternative addresses. To edit one of these addresses, click on it.

For information about adding multiple addresses, see sections "Edit an Address or Location" or "Add Additional Addresses."

Steps:

1. Click on CONTACTS overview to get to the overview screen.
2. Click on the address in the "Other Address(es)" field that you would like to designate as the new primary address.
3. On the Edit Address Information screen, click in the box titled "Make Primary Address?", which is located at the top left of the screen. This adds an "x" to the box. Click "OK."
4. On the overview screen, you'll see the new primary location is now listed under the contact name at the top of the page. The former primary address is listed in the "Other Address(es)" box.

“SEASONAL” ADDRESSES

Sometimes people live one place in the winter and another in the summer. Or they have a school address and a home address. To keep track of where people are based on what month it is, ebase allows you to designate seasonal address start and end dates for existing address.

In the “Other Address(es)” portal in CONTACTS>Overview, a green “@” symbol designates a currently valid seasonal address. In the example above, the Overview screen shows the contact's name and primary address at the top left. To the right of this, there are two bars (--) indicating that the address is not currently the valid seasonal address. In the example below, the designated primary address, Sun City, under Other Address(es) is currently valid.



A printed mailing label using the PCL Address would have an address of Sun City FL, the currently valid seasonal address rather than the Helena MT address.

Designating “Seasonal” Addresses

Steps:

1. Click on CONTACTS to get to the overview screen.
2. Click on the address in the “Primary Contact” or “Other Address(es)” field that you would like to designate/edit the seasonal address start and end dates.
3. On the Edit Address Information screen, click in the month or day fields in the area labeled “This Address used as Primary from:” which is located at the bottom right of the screen.

The screenshot shows the "Edit Address Information" screen. In the bottom right corner, there is a section titled "This Address used as Primary from:". It contains two sets of input fields: "MO/Day" with values "2 / 5" and "Through MO/Day" with values "7 / 30".

4. To use Seasonal addressing, ebase requires the beginning and ending month and day be set. Set the target months and days. You should try to avoid entering locations for a

contact with overlapping date ranges. If the "valid" date ranges for one or more addresses for the contact overlap, you will see more than one "@" in their locations display and ebase will use only one of these for the primary address in labels.

Using "Seasonal" Addresses in exports and reports

The primary contact location fields (calculated fields in the Contact's table) will show seasonal addresses if seasonal dates are set. These Fields are the fields in Contacts which start with PCL such as "PCLAddline1" or "PCLAddressLabel". Many ebase reports such as "Avery 5160 Labels" use the PCL address so they will show the correct seasonal address.

The seasonal address calculations are used by some, but not all, ebase fields. If you are choosing fields for a custom export or report, note that most non-PCL fields do NOT use the seasonal address.

NOTE: Using Seasonal addresses requires that the field used to calculate "today's date" be correctly set. Unfortunately FileMaker Pro requires that this date be either calculated the first time a database is opened today, or through a manual update process.

Some reports will prompt you to update this prior to running the report. You can also update "today's date" at any time by going to:

ADMIN>Maintenance Scripts and running "Update seasonal addresses".

If you use the seasonal address feature at all, it is advisable to update the "today's date" calculation at least monthly and before running reports to assure that valid seasonal address flags are displayed on the CONTACT overview screen.

ADD LOG ENTRY: INTRODUCTION

NOTE: Adding a log entry is explained in more detail in the next chapter of this manual.

Log entries are records you create in ebasePro to track a contact's actions, interests, communications and payments. Log entries are "attached" to each contact record and are usually displayed in chronological order, by the date they were posted in the log.

Log entries can be anything that can relate to an individual, family or organization contact record, but before you can add a log entry, the kinds of log entries you can add to your contact's records have to be defined. Usually, your database administrator (DBA) has already done this by creating a set of "codes" that defines what a specific log entry is supposed to do and what kind of information should be displayed and managed by ebase.

(See the chapter on Codes for more details on how to create the codes that define your set of log entries).

If your organization is interested in recording a general interest in volunteering, you would:

- a) Create a code that defines the kind of log entries that can be made to record this interest.
- b) Find a contact (or group of contacts) who have this interest, and add a log entry to their contact record, indicating that they are interested in volunteering.

This process is similar to doing it manually, using file folders and forms.

Before you can record anything about a contact, you'd have to design a form in which to record that information. Then, you fill out the form for each new person. This is exactly how codes and log entries work.

ebasePro "codes" are the forms, "log entries" are the information that goes into the forms.

For example:

1) Your organization has regular volunteers who write newsletter articles. To track their interest so your communications director can find them, your or your database administrator creates a code called "Interest in volunteering".

You select this "form" to fill out because you want this particular bit(s) of information – person A's interest in being a volunteer – to be attached to the person's history in a purposeful way.

You add the log entry to the person's record and in the note field you mention that this person is interested in writing newsletter articles.

2) Alternatively, you may have a code called "Land Fund payment" that you use to track donations to a specific fund. You fill in the amount, the payment method, check number and/or authorization information, etc. as well as link this log entry to a particular solicitation and/or a solicitor.

3) Or, to show that a thank you letter was sent to a contact who renewed their membership, you may add the code "Thank you sent – renewal" and enter a copy of the letter's body into the note field.

Add a Log Entry:

The "Add Log Entry" link under "CONTACTS" in the left navigation bar initiates the process for storing a great variety of descriptive data about your contacts. Each entry stores a discrete chunk of information about a contact, such as member dues paid, gift donations made, actions taken on behalf of the organization, board membership, event attendance, or communications the contact received from you, etc.

You may view all entries for a contact in a larger format on the CONTACTS>Full History screen. From this screen you may also choose to view pledge and payment history – specific screens for the current contact.

When you add an entry to a contact record, you will be given the opportunity to edit details about that entry. Details may include information specific to that type of entry as well as priority and deadlines (for follow-up). You may assign an entry to another user of ebase, and that entry will be shown in their To Do list. You may also add notes to an entry.

It is possible to add entries to multiple contacts all at once using a batch process. With this process, you do not have the option to add details for that entry. For more information, see "Batch Entry of Entry Data."

Steps:

1. Make sure you are viewing the contact record in CONTACT overview for which you want to add the entry.
2. Click on CONTACTS>Add Log Entry.
ebase tells you what the current Log Code is and gives you four choices:
 - a. Add Log Entries to the current found set ("Found Set")
 - b. Add Log Entries to the current record ("This Record")

- c. Choose a new Log Code to add ("New Code")
 - d. Cancel and return to overview screen ("Cancel")
3. Is the current Log Code the one you want to add to the current record?
 4. If yes, click "This Record".
 5. If not, select "New Code" and choose the Log Code you want to use on the next screen. You will need first to select the code class from the drop-down list at the top of the screen, which will then display all possible entry codes within that class. After you make your selection, you will again receive the screen that shows you the current log entry and prompts you to make a selection for adding it to the current record or to the found set. Click on the button that represents your choice.
 6. You will be taken to a screen where you can edit the entry details, which vary depending on the class of entry you have chosen. For most classes, you can enter details such as priority, assigned to (select a user name), the date to contact by and the date that the person was contacted (most of the time, this will be filled in at a later date). Payment entries will include payment-related details. You may also enter notes for the entry. Click "OK" once you are done.
 7. You will now see the entry in the "Recent Entries" area in the overview screen.

NOTE: If you cannot see the entry you just added, your user account may not allow you to see entries in the Recent Entries portal or the code for the entry you just added may not be marked as viewable in the public history. To resolve the issue your administrator should either allow you to view recent entries portal or mark the code as viewable in public history.

Delete A Log Entry

Only someone with admin privileges may delete a log entry. However anyone may mark an entry for deletion.

Simply click on the red "DEL button" next to the entry you wish to delete. You will be offered a drop-down list of reasons: choose one and click OK.

If, after deleting the entry, you decide that you really do need it, click a second time on the DEL button. You will be asked if you want to "Undelete this Log Entry?", click OK and the entry will no longer be marked for deletion.

Batch Entry of Log Data

Batch entry is used when you need to enter the same entry for a found set of contacts. You might use this to record a solicitation letter that was sent to all contacts who donated \$500 in March. Or, you could use this to record attendance at an event based on a signup sheet. In the former example, you would be able to create a found set by searching for payments of \$500 and/or by the date posted.

In the latter example, you need to enter the contacts by hand and include a unique identifier so you can later create a found set of the newly entered contacts. For instance, you may want to add the event name in the "Source" field located on the address screen.

NOTE: The batch process does not allow you to enter the same amount of detail for an entry as does adding the entry manually. You are given the option to enter a custom description, hours (for use when entering "actions" like volunteer time etc.), and date and that is all. Only users with administrative level access can edit entry records to add details afterwards.

Steps:

1. Create a found set using the CONTACTS>Quickfind link or the CONTACTS>Find link on the left navigation bar. When you return with a list of entries, click on the Contacts icon at the bottom of the List screen to navigate to the Contact overview screen.
2. Click on Add Log Entry.
3. Choose the code for the entry that you'd like to apply to all of the records in the current found set.
4. When the dialog box comes up, click on "Found Set".
5. Click on "yes" when you receive the "Create new log entry for the found set using the current log code" question.
6. You will receive a screen that gives you the option to add some "custom" data to the entry that you are about to add. If you wish, you may add entry description, hours and date posted to the entry. When you are ready, click on "Continue".
7. The entry you just chose will be replicated for all the records in the current found set. Depending on how many contacts are in your current found set, this may take a while (but it's a whole lot faster than doing it one at time!).

Custom data details:

- Description – is found on most log entry views
- Hours – is found only on the Time view
- Date – is found on all log entry views

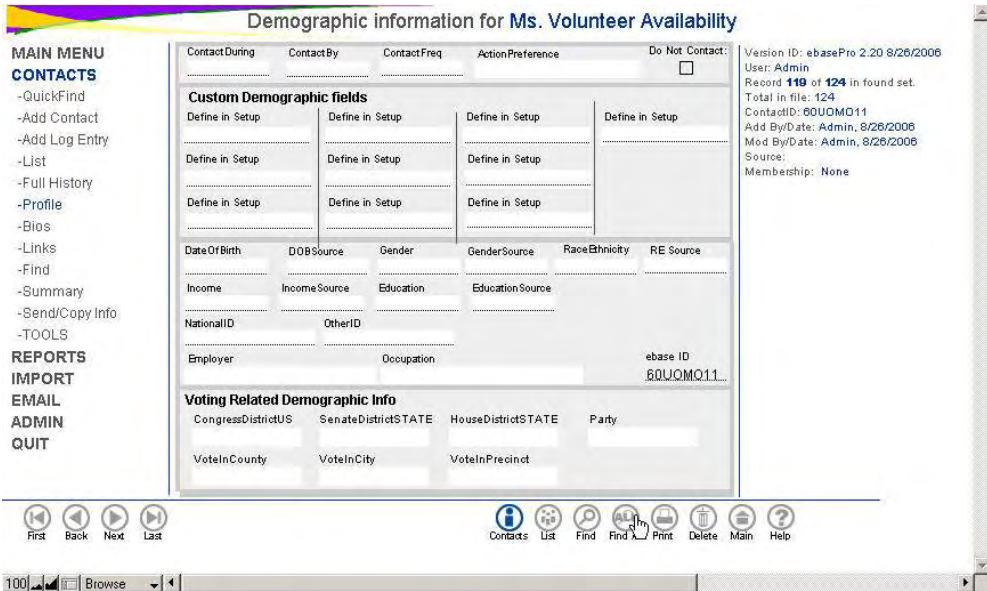
ADD PROFILE AND BIOGRAPHICAL DATA

Demographic data

You may add or edit profile or biographical data to a contact at any time. To do so, use the left navigation bar to click on the "Profile" or "Bios" links under the "CONTACT" link.

Profile data includes a contact's:

- Employer
- Occupation
- Date of birth (and source of the data)
- Gender (and source of the data)
- Race/ethnicity (and source of the data)
- Income (and source of the data)
- Education (and source of the data)
- Contact preferences (time, method, frequency)
- Action preference (type of action the contact would prefer to take on behalf of the organization)
- Legislative district
- Political party affiliation
- Voting location (county, city, and precinct)



In addition, there is space for 10 user defined (Admin user that is) demographic fields.

To change the labels for these user defined demographic data fields:

1. Go to Admin>Setup ebase.
2. Click on "Custom Labels".
3. Enter the labels you want into the label fields.
4. Log out, then log back in. Your new labels will appear on the Contact:Profile screen.

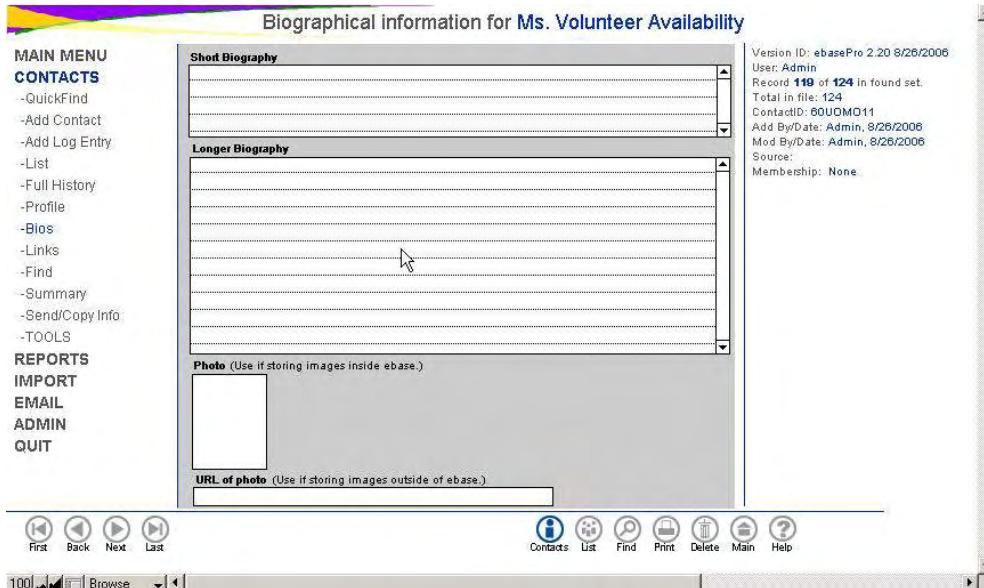
NOTE: If you plan on using ebase in a client/server environment, it's best to set these settings while ebase is operating in single-user mode, then separate the client and server side files. Otherwise, if you set them while in client/server mode, the values you set will be held for that particular client session only. This is because these labels are created as FileMaker Pro "global" field values. It's an unfortunate conundrum but the problem is related to how FileMaker stores and calls out memory variables.

There is ample documentation on the Internet about how FileMaker handles "global" values in client/server settings. For the purposes of using ebase in a client server environment, it is best that you configure ebase for your organization in single user mode, then host the data once you have the configuration set. See the Client/Server section for more details

Biographical data

ebase stores biographical data for the main purpose of putting together speaker lists and event programs. Ever pull together an event and then at the last minute the development director wants you to get the speaker bios and include them in the program?

ebase makes it easy for you to store and refer to speaker bios. CONTACT>Bios allows you to enter a short and a long biography and will store photos as well. Further, if your speakers' photos are online somewhere, you can record the URL that points to their online photo. You can also perform finds using profile and biographical data.



Steps:

EXAMPLE ONE: Add profile information.

1. Make sure you are on the record you want to work with by checking the overview screen (CONTACTS overview).
 2. Click on the "Profile" link on the left navigation bar. (CONTACTS>Profile).
 3. Add or edit profile information as appropriate. Information is automatically stored in the fields.

EXAMPLE TWO: Add biographical information.

1. Make sure you are on the record you want to work with by checking the overview screen (CONTACTS overview).
 2. Click on the "Bio" link on the left navigation bar (CONTACTS>Bios).
 3. Add or edit biographical information as appropriate. Information is automatically stored in the fields.
 4. To store a photo in ebase, right-click or Command-click on the Photo field and select "Insert Picture".

CREATING AND EDITING LINKS

ebasePro “Links” are named relationships “linking” two records in the Contacts database. For example, you can use the Links function to record family relationships by starting with the family overview, then link to family members in the database.

You can also use Links to record employer/employee relationships, friend/acquaintence relationships. We've even seen a group use it to link contact's to potential adopted animals and parties involved in a conservation easement process linked to a land record.

The ebase “links” function is extremely versatile and can be used to:

- display one-way relationships: Joe Johnson knows Bill Gates, but Bill Gates has no idea who Joe Johnson is,
- and, reciprocal relationships: Tamesha is Mary's sister, and Mary is Tamesha's sister.

Links between contacts are listed in the Community Links area of the CONTACT overview screens of the related records. Each Contact record views the relationship from their own perspective. For example: On a family screen, the Chumrau family sees Aaron as a "Member of Household". On Aaron's screen, he sees the Chumrau family as "family".

Clicking on the contact name listed as the linked record will bring you to that contact record. Clicking on the relationship name listed to the right of the contact name (family, employee, employer, etc.) will allow you to edit the name of that relationship and add or edit any details about that relationship.

To create a new link or to edit an existing link, click on the Add Link button above the Links portal. Alternatively, go to CONTACTS>Links. This screen lists all link information and allows you to create a new link or view and edit detail information about a link. When creating a link you will be asked to name the relationship between contact records.

Steps:

EXAMPLE ONE: Add a link.

1. Make sure you are on the record you want to add a link to by checking the overview screen (CONTACTS overview).
2. Click on "Add" in the Community Links portal.
3. You will be asked to do a Quickfind to return a list of contacts you want to link to. If you are not sure of the name of the contact, type in nothing and click "OK" to find all contacts.
4. Choose the target contact to which you want to link.
5. You will be asked if you want to create a one-way or a reciprocal relationship. Click on the button that represents your choice.
NOTE: If you are creating a link from a family record, you won't be asked if you want a reciprocal or one-way relationship; relationships with a family record are ALWAYS reciprocal.
6. Describe the relationship between the contact you are working with and the contact you just chose by using the pop-up menu. Enter notes if applicable.
7. Click "OK" You will now see links listed in the source contact's overview screen.

EXAMPLE TWO: Edit a link.

1. Make sure you are on the record that has the link you want to update.
2. Click on the relationship area of the link you want to edit. (If you click on the contact name, you will be taken to that contact.)
3. You will be taken to a screen where you can edit or delete the link. When done, click "OK."

EXAMPLE THREE: Add employees to an organization.

1. Check the overview screen to make sure you are viewing the organization to which you want to add employee links.
2. Click on "Add" in the Community Links portal .
3. You will be asked to supply a name for the contacts that you wish to link to the organization.
4. Choose the contact.

5. ebase will prompt you to describe the relationship between the contact and the organization. Choose "employee" on the pop-up menu.
6. If this person is the "Primary Organizational Contact", click in the box to the left of that choice to put a check in it. You will receive a message that says "Make this contact the new Primary Organizational Contact for this Organization [an organization can only have one POC]". Click on either "yes" or cancel to continue.
7. Enter notes if applicable
8. Click "OK". ebase will then prompt you to describe the relationship from the employee's perspective. Choose "employer" on the pop-up menu. Enter notes if applicable.
9. Click "OK". You will now see the employee listed in the organization's overview screen. If you indicated that the employee was the Primary contact for the Organization, you will see a small <P>, in red, to the right of the contact name in the Community Links portal.
10. Click on the employee's name to view his/her record. You will see that the organization is also listed in the employee's list of Community Links.

MARKING AND DELETING CONTACTS, ADDRESSES, LINKS AND LOG ENTRIES

Only the database administrator (or someone with equivalent access privileges) can permanently delete entries or locations from the database. However, users can mark an entry for deletion, for later review by the DBA.

When an entry, link or contact is marked for deletion, it is highlighted in red. When you delete one link that has a reciprocal link, the reciprocal link is deleted as well.

Users may remove a deletion mark, see details below.

NOTE: Until the database administrator removes the link, log entry or contact from the database, you will still be able to search for it, and it will still be included in finds, reports, and exports.

CAUTION: Address information is deleted immediately, it is NOT marked for deletion as the ebase standard. Users need to update addresses right away and not be forced to wait for the DBA to delete the previous address.

Mark (Flag) a Contact for Deletion

Use the Delete icon on the overview screen to mark a contact for deletion. When you mark a contact record for deletion, ebase asks you to verify your choice and then prompts you to specify a reason for deletion. (The reasons can be edited under ADMIN>Value Lists>DeleteReason) If you accidentally mark a contact for deletion, you may remove the mark by clicking the "Delete" icon again.

NOTE: Only the database administrator (or someone with equivalent access privileges) can actually delete contact records and entries. This is a safeguard so that records can't be erased accidentally!

Steps:

1. First, make sure you are viewing the contact record you want to work with on the CONTACTS overview screen.
2. Click the "Delete" icon at the bottom right of the screen.
3. You will be asked to select a reason for marking the contact for deletion. Choose one and click "OK."
4. You will be returned back to the overview screen. You will see that most of the contact record is marked in red.

5. To remove the deletion mark, click on the "Delete" icon again. You will be asked if you want to "Restore this Contact and all related Log Entries and Links?". Click on "Yes".to confirm your choice.
6. Once you confirm your choice (click Yes), you will be returned to the overview screen. Note that the contact is no longer marked in red.

Deleting an address

This is the one time when you are not marking for deletion—you are deleting the address. This action does NOT include phone, email, or any other contact information other than postal address.

1. Click on the name and address space.
2. The next screen is the Edit Address layout. On the bottom left-hand is a checkbox labeled “Remove address from this record? YES”.
3. Clicking in this box will automatically delete the postal address information.

Marking a link for deletion

- a) From the Contacts overview screen>Community Links area, click on the named link column (“Member”, “Employer”, etc.).
- b) On the bottom of the Edit Relationship screen is the “Delete” icon. Click it and select a reason for deletion.
- c) This is a toggle, you may click on the “Delete” icon again and unmark the link.

Mark a log entry for deletion

There are two ways to mark a log entry for deletion:

- from the Contacts overview screen – Click on the pink “Del” button on the right-hand column of the Recent log entries area. You may toggle back and “un”-mark the entry by clicking the “Del” button a second time.
- from the log entry screen – Click on the “Delete” icon on the bottom right of the screen. This is also a toggle, click on it a second time and the entry will be no longer marked for deletion.

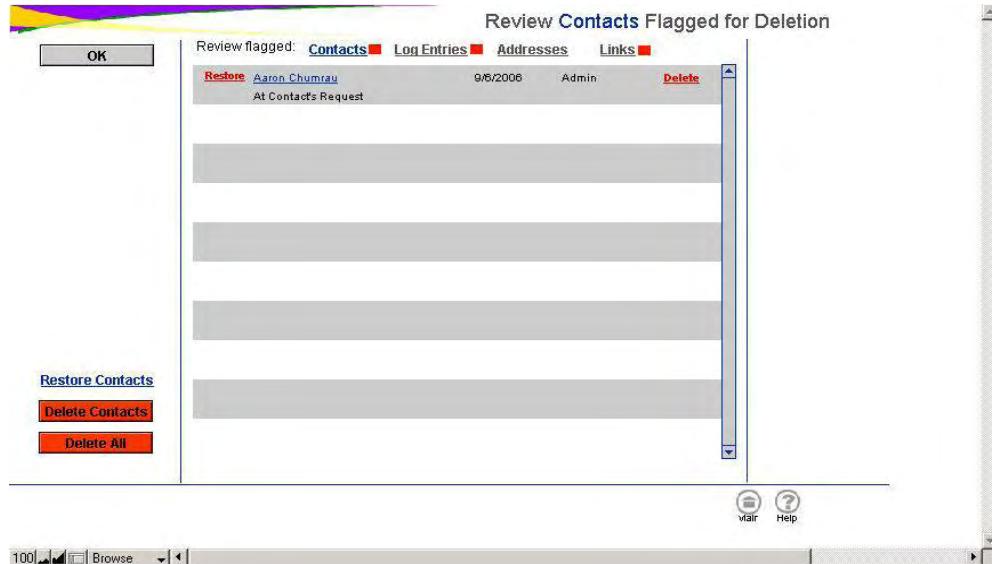
Deleting records marked for deletion

Only Admin users can actually delete records in ebasePro. The basic process is to have users mark records for deletion, then have an Admin user review the records (knowing what they know about the organizations, its key contacts, and its priorities) to make sure that they in fact should be deleted.

To delete a record it must first be flagged (marked) for deletion by a user.

Steps:

1. Go to ADMIN>Review Deletions
2. You will be presented with a screen that is similar to the one below:



The "Review Deletions" screen

3. If you wish to view the details for what is available for deletion before deleting it, click on any of the 4 underlined labels that appear at the top of the screen: Contacts, Log entries, Addresses, Links. Please note that a small red box will appear next to a label only if there is data available for deletion. If the box is not there, it means that nothing in that category has been flagged for deletion.
4. You can either delete or restore an individual record by clicking on Delete or Restore.
5. You can navigate to the record being marked for deletion by clicking on the underlined portion of the record. It will take you to the CONTACT>overview screen for that record.
6. You may also look at the details of individual Contacts, Log Entries, addresses and Links by clicking on those words at the top of the screen.
7. If you simply want to delete all contacts and their related entries and links, click on the "DELETE ALL" button.

CAUTION: Clicking on the "Delete All" button will irrevocably delete these marked contact records. Be sure you want them deleted before clicking on this button.

NOTE: The ebase delete function does not delete Location records: it leaves them in case you need to reuse a location at a later time. For example, you may want to delete a contact at a university, but you know that later on you will want to replace that Contact with a new entry. ebasePro will retain the university address information in the original Location record. If you want to remove "orphaned" location records—those Location records that have no corresponding ContactLocation records—then you need to run the "Delete Orphaned Records" script in ADMIN>Maintenance.

[8] MAKING EBASE WORK: LOG ENTRIES AND CODES	2
Entries and Codes: The keys to ebasePro	2
background.....	2
WHY HAVE “CODES” INSTEAD OF FIELDS?.....	2
Planning is better than reacting.....	2
Needs assessment.....	3
How does all this “planning” discussion relate to the Log?	3
Getting started using ebase Log codes.....	3
what is a log entry?	3
What is a Code?	3
what is a code set?.....	4
What is the code generator?.....	4
A simple overview of “Log entry” creation in two examples	4
Refining your Log Codes.....	6
Further Planning of your code set.....	6
Define the need	6
create the code.....	7
Which path to follow?.....	8
What are Codes good for?.....	9
OVERVIEW: So how, precisely, do you go about creating a code?.....	11
Setting up your organization’s code chart	11
Creating codes in Code Generator	12
Details: The code definition screen:	13
Final thoughts on creating codes.....	18
Editing codes.....	19
Viewing all codes.....	19
Deleting a code	19
Using your codes to actually do something: Working with Log entries.....	20
Viewing Entries	20
adding Entries	21
Managing organizational data with ebase codes.....	22
DEFINING Membership	22
Action vs. Event Entries	23
Communication and Solicitation Codes.....	23
Sample codes and data that come with ebase	25
Evaluation and Optimization	25
Additional Features:.....	26
Add a “To Do” Entry for Yourself or Someone Else	26
Thank you features.....	26
Error Message: “Hosed Codes”	27

[8] Making ebase work: log entries and codes

Entries and Codes: The keys to ebasePro

If Contacts is the heart of ebasePro, log entries and codes are the keys that allow the heart to beat.

The previous section discussed how ebasePro tracks contact information. This section describes how ebasePro tracks “everything else” – the “log.”

BACKGROUND

Very early in the development of ebasePro it was recognized that although most grassroots, membership-based organizations share similar “business processes”, the exact terms used to describe those processes often vary based on an organization’s mission, constituency, history, and strategic goals.

Further, many people involved in the development of ebasePro were staff members of established groups whose staff remembered how simple things seemed “in the beginning” and who had the responsibility of switching to new systems when they outgrew their simple tracking systems and needed something more sophisticated.

These people felt that it would be ideal if their system could grow, change shape and function, as their organizations grew. That was the genesis of the ebase “log” system.

WHY HAVE “CODES” INSTEAD OF FIELDS?

Many nonprofit data management and fundraising programs attempt to bound the problem of what to track by limiting the kinds of things you can track, and restricting what you can call them. If your organization changes how it does business, (i.e. shifting the burden of funding from major donors to small contributions, or vice versa), it frequently requires changing the programs you use to collect your data. Not so with ebasePro.

ebasePro gives you almost complete control over what kinds of data you can track, and what kind of information you can generate from that data. Unlike fields, ebasePro lets you add entirely different kinds of data as your organization changes. So you can continue to use ebasePro to track new kinds of data without constantly adding new fields and bloating your database.

ebase’s code structure helps you, as database administrator, organize entries in advance, so when a user adds an entry to a contact it’s done in an organized way. Organizing the data with codes makes it easy to retrieve data later when producing a report, sending email, etc.

Planning is better than reacting

ebasePro was designed to work within a Planning – Deployment – Evaluation – Optimization continuum.

The planning stage, making decisions about what you want, is the hardest part of using ebasePro.

Many groups download ebase because there’s a “problem” with their database. Unfortunately, reacting to problems is not always a good place to begin the implementation of a new database.

Typically, there are severe time pressures involved in “fixing” the problem instead of directing organizational attention to uncovering the underlying causes of “the problem”. Further, when

groups get into “problem-solving” mode, they frequently derive goals and objectives backwards, from the problems, and frequently--and unintentionally--ignoring other problems that may result from the “fix”.

NEEDS ASSESSMENT

If your organization is in the above situation, you should consider hiring an experienced database consultant to take you through a needs assessment and help you with the planning phase of your database deployment. A good database consultant has a wealth of knowledge about what mistakes he has seen groups make, and often have very reasonable assessments of what it will “really” take to get your database in shape.

HOW DOES ALL THIS “PLANNING” DISCUSSION RELATE TO THE LOG?

So, you are ready to take the time to craft ebase into the best tool for your organization’s needs. What’s next?

When you download ebasePro, there is a simple set of codes already provided that address some of the needs faced by most organizations. These sample codes do not address all of the needs faced by all organizations.

You are going to have to customize ebasePro so that it tracks what you want it to track. And the way that you do this customization is by defining the kind of Log entries you will track.

Getting started using ebase Log codes

WHAT IS A LOG ENTRY?

Reminiscent of a ship’s captain with his daily log, you record Log Entries to track a contact’s actions, interests, communications and payments. Log entries are the history you create in ebasePro.

Log entries can be anything that can relate to an individual, family or organization. But you have more choices of how you will record information than your average skipper. Before you can add a log entry, you must define the kinds of log entries you wish to track.

Part of the versatility of ebase is that you have many elements to chose from to create just the right mix of information to give staff exactly what they need to do their best.

You define the information mix by creating codes. A Log entry is a code in use.

WHAT IS A CODE?

Codes provide important details for the creation and use of Log entries, including their title, display and edit layouts, and integration with a number of ebase features such as membership and email.

As a user, you choose a code for each log entry you add to a contact. When a code is added to a Contact, it becomes a Log Entry.

A code is like a custom field in that it contains data specific to a record, like payment date and amount. Codes are much more flexible than custom fields because they can be related easily to various forms of other important information like address and to each other to form in-depth reports.

The elements of a Code

This is where ebase gets interesting! The elements can be combined in several different ways to produce different codes that track (almost) anything you need.

The basic elements can be broken down into four parts:

- Title
- Screen view
- Code classification (buckets)
- Code settings (checkboxes)

WHAT IS A CODE SET?

A group of codes is called a code set. You, as database administrator, create and maintain your organization's code set.

WHAT IS THE CODE GENERATOR?

It is a tool within ebase where you create the codes for your Log Entries.

A SIMPLE OVERVIEW OF “LOG ENTRY” CREATION IN TWO EXAMPLES

Deciding what and how to track is fairly straightforward but, depending on what you need, may require making a lot of decisions.

NOTE: Many people have found setting up a simple spreadsheet to be helpful in the code-making process. There are sample code sets from real organizations available on the ebase community website.

Here's a brief outline to follow in crafting your codes:

Example One:

- 1) **Define a need**, say you want to track people who've mailed in a form stating their interest in volunteering at a booth.
- 2) **Create a “code”** that fills that need. To create a new code for interest in booth staffing you go to Admin>Codes. You then:
 - Describe what this code tracks—give it a title, such as “Volunteer interest: booth”.
 - Select which grouping of fields best fits this need—the screen view, in this case the Note Edit and Note View layouts.
 - Define the general area this needs falls into—classify it by filling in “bucket1” as class Interest.
 - This is a very simple code and doesn't need further refinement by code settings. ebase then does a lot of work to add your new code to a bunch of “picklists” in various parts of the program.
- 3) **Add the “log entry”** (defined by the code that you just created) **to one or more Contacts**.
 - Go to Anne Homer
 - Click on “Add Log Entry”
 - Choose first the class of codes—Interest, then select “Volunteer interest: booth” from the list
 - Click OK when done filling in the data
 - Many codes don't need further explanation or data entered. However this entry needs to be assigned to the staff member in charge of events. Do that by clicking in the “Assign to” field and choosing the correct staff person.

- 4) Then, to **produce a list or report**, you will do a find for all Contacts that have a interest in volunteering for the booth staffing “entry” in their log history.
 - Click on Find icon
 - Click on Entries button
 - From the field Log Entries, choose “Volunteer interest: booth”
 - Click on the Find button
 - You will get a chance to do further fine-tuning of your find, then click Done (or hit Return)
 - All the people will show up in a list view
 - Click on the Report icon
 - Choose the report you need

Example two:

- 1) **Define a need:** to track a year end appeal campaign. You want to know who got the letter, who responded and to be able to track thank yous.
- 2) **Create a code** for the solicitation
 - Give it a title “2005 Year End Appeal”
 - Chose the screen Communication Edit
 - Classify it as a solicitation by filling in bucket1 with “Solicit”
 - Further refine the code by marking the setting checkbox “View in solicitation list”
- 3) **Add the log entry** “2005 Year End Appeal” to the group
 - Find the group who should receive this appeal. Perhaps it is all current and grace members.
 - Click on “Add Log Entry” and chose your code.
 - When it asks if you want to add this code to a single record or the found set, click on “Found Set.”
 - Be patient. If your found set is large, it may take a while to add the entry.
- 4) When you need to **print a set of labels** for your mailing, find for the log entry and go to Report>Generic>Labels.

Tips for code creation

- For the most important things you wish to track set up a spreadsheet first with the above four elements. You may add additional bucket types later when you wish to finesse your code set.
- Look over the list of screen layouts to learn what type of information they store.
- Title your codes in a consistent manner so that similar or related codes sort alphabetically next to each other.
- Duplicating an existing code is an easy way to add new codes.
- When creating a new code “on the fly” look at other similar codes as a recipe for the new.

That's the basic process. Underlying the process is a lot more stuff you'll probably want to pay attention to. A more detailed explanation of this process follows.

Refining your Log Codes

FURTHER PLANNING OF YOUR CODE SET

To recap, ebasePro provides a place where you can record ANY type of attribute or transaction. This place is called the “log” (similar in concept to a ship’s captain’s log).

The ebasePro Log is a place where you and your staff can record their observations about, and interactions with, any of your constituents. In ebasePro, you track these sorts of things by creating “log entries”—individual records of attributes (like, “Board member”) and transactions (“Membership payment”).

The complication comes when you and your fellow staff have to decide precisely which kinds of observations and interactions are worth tracking. This is where a lot of groups get stuck: they have never had to define what it is they need to track, and they’ve always used the limitations of their tools to decide what data to collect.

The “ebase way” – decide then act

While this may seem complicated at first, ebasePro allows you to start with a very simple system, and then expand that system as your group becomes more successful and changes to adapt to the needs and demands of your constituency.

The “ebase way” is to get groups to decide what data they need to capture *before* they customize their tools. This results in a better fit between how an organization works and what tools it uses to track that work.

The process of deciding what data to track often comes as a result of a problem that illustrates basic weaknesses in an organization’s data collection system. Most groups interested in adopting ebase do so as a result of some kind of problem spurring them on to seek solutions that can immediately improve their working situation.

Problem example: One part of an organization discovers that another part of the organization has been routinely mailing duplicate materials to “their own” contacts, wasting time and money. Another group discovers that key communications aren’t being done because two departments of the organization have responsibility for collecting a certain kind of data, and neither department collects it because they assume the other group has responsibility.

ebasePro can be useful in these kinds of situations because it allows everyone to look at the same information, and (collectively, consensually, collaboratively, or hierarchically) decide what kind of data should be tracked, who is responsible for doing the data collection, and who can view the results of the data collection.

DEFINE THE NEED

The concept is really very simple. Look at the business practices you already do. Ask yourself:

- What data is my organization tracking?
- What data do we wish to track?

For example, say your organization distinguishes between payments for memberships, and payments for “stuff” (i.e. tchotchkies, junk, souvenirs, knick-knacks). You have a choice to make:

Do you record only payments? Or do you record Membership Payments and Stuff Payments as separate entries?

You can decide to create two types of payments (there are certain procedures in ebase that can help you manage membership payments if they are separated out), but your particular

group may not need separate reports on “membership” payments. You can record the payment details in the “entry description” field, or you can create separate codes to describe the separate payment types. It’s up to you.

The place that ebasePro lets you define these entry types is called the “Code Generator”. You use the Code Generator to define the kind of Log entries your organization records.

Here's more definitions...

Log file

A *file*. Entry records are stored in the Log file (Log.200). The Log retains all significant activity that happens with a contact, just as a ship's log holds all significant activity on board a ship.

Add Log Entry

An *action*. When adding a log entry for a contact, a user first picks the entry from a list of entry names. This list is made up of the titles of the codes that you, as database administrator, have set up in ebase.

Code Generator

A *file*. The file within ebase (CodeGen.200) where your codes are developed and stored.

Code Title

A *field*. Each code has a title, a short phrase (that you create) that describes in plain language the data you wish to record. Since users choose from a list of code titles when adding an entry for a contact, **each code title must be UNIQUE and informative**.

NOTE: Code titles should not exceed 40 characters and no single word can exceed 20 characters. Optimally, code titles should be no longer than 36 characters. Codes are listed alphabetically by Code Title when users choose from a list of codes. For code categories that you have a lot of entries, or could potentially grow, (such as solicitations) have a standard naming convention that contains a logic that can replicate easily. For example, use “2001 Renewal Jan”, “2001 Renewal Feb”, etc. This puts all your renewals together and separates them from your new member or annual appeal campaigns. Similarly, using “Com Exec”, “Com Issues,” etc. for your committees lumps them together and separates them from other roles like officer or volunteer.

CREATE THE CODE

When you are going through the process of creating codes, you are defining the entries that you think your organization should track.

A database is not meant to be just a storage system, but rather a method for retrieving data easily. The way you create a code and format your data storage should be based on how you want to retrieve that data later.

If you are keeping a phone book you don't sort your information by phone number. You sort it by name. You sort it by name because you use the phone book to retrieve phone numbers.

Take the answers to the above questions about your business practices. Set up a spreadsheet. Use the answers as Code Titles.

The next step in code creation is to ask two more questions:

- "Why do I want to track this data?"
- "How do I need to report on this data?"

A few more definitions...

Code Description

A *field*. Each code also has a unique code description, a phrase or sentence that describes the data meant to be captured when a particular code is used. Clear code descriptions help your staff and your successors better understand and use the codes used in your database.

Code “Buckets” or Template

More *fields*. Each code is made up of data stored in up to eight "buckets" (code data fields), basically a template on which to create a unique log entry. ebase uses these values to classify information and run reports. These eight buckets can be used to create a data taxonomy, a personalized system of classifying data into broader categories that is non-hierarchical and eight levels deep.

ebasePro provides **default data categories**:

Bucket1: Class

Bucket2: Owner

Bucket3: Project

Bucket4: List

Bucket5: Type

Bucket6: Method

Bucket7: Date

Bucket8: Legacy Code

This taxonomy can be used to track a specific product for a particular department.

WHICH PATH TO FOLLOW?

One of ebase's greatest strengths is its ability to be easily customized. There is almost always more than one way to get the same result, but with different levels of precision and effort. How you decide to do it depends on your needs.

There are two major forks in the road: imbedded vs. stored data within the Code/Log entry and data stored within fields such as Profile>Gender.

Data can be imbedded within a Code. This provides very specific reporting possibilities and means easy bulk creation of Log entries. However, it can lead to code proliferation and become clumsy.

Or, data can be stored within the fields of a Log entry. Fewer codes with wider applications need to be made. The potential downside is more data entry is required as each Log entry is added.

Lastly, data can be kept in fields within Contacts>Profile: gender, occupation, contact type information, some voter information and several user-defined fields.

For example:

There are several ways to mark contacts that should not receive mail anymore. These two examples show how you can use Log entries to record that someone shouldn't receive mail vs. using a Contact field included for that same purpose.

Example One – using a Log Entry with imbedded information:

You can set up separate entry codes for each reason a contact doesn't want to be mailed. You would end up with entry codes with names like "No Contact--deceased", "No Contact--doesn't want mailing" and "No Contact--former member". When doing this, make sure the code buckets and the code titles are consistent.

Advantages: Since the entry code name will be listed in the recent entries portal on the Contact Overview page, you will quickly be able to see that a contact does not want to be contacted and the reason why.

Since you used consistent code titles and bucket data, you can easily omit contacts from a found set based on code title or bucket.

Disadvantages: This will create more codes than the other options.

It will "clutter up" a contact's entry history.

In large databases, (40000 or more contacts) performing searches with multiple criteria can be slow.

Cannot use "toggle" codes to set up a metaflag.

Example Two – using a simple Log Entry

You may set up a code with a more generic title, "Do not contact" and when adding this log entry to the contact enter the reason into a memo field.

Advantages: One log entry can be used for multiple purposes thus keeping your code set smaller. When doing a find you only have to chose one entry to omit these people from your found set. You can set up a metaflag.

Disadvantages: You can't see the reason easily from the Contact overview or History screen.

Example Three – Using a field:

Use the "Do not contact" field in Contacts>Overview.

Advantages: Can search for all contacts who don't want to be mailed, for whatever reason, very quickly. You limit the complexity of your code set.

Disadvantages: You need to be good about filling out profile notes to record why a contact doesn't want to be contacted. If not, you may not be able to search for all of your deceased ex-members.

WHAT ARE CODES GOOD FOR?

The decisions your organization needs to make are based on your own needs and circumstances. The illustration below about how to handle membership payments is meant to give you an idea of some ways you can "wrap your head" around the challenge of designing codes for your organization.

Member payments:

- Do you have membership levels that are based on payment levels? I.e. Do ALL of your memberships require a specific level of payment OR does your group use some other attributes (in-kind contributions, participation, education) to set membership levels?

- If you only use payments, then the “problem” you face is how to make entering payments easy and payment levels easy to report.
- *If you use other attributes besides payments* (say, participation), then you need to decide if a single “event” (i.e. coming to an annual meeting) is sufficient to grant a membership, or if it’s some sort of complex series of events and payments that creates a member.

Example: Simple membership criteria

The Society for the Preservation of Chivalry (SPC) has members and prospective members. Anyone who gives more than \$50 a year is considered a member.

Everyone else is a prospect. criteria

SPC only records payments, then derives memberships based on summary of payments for this year. They “call” people who have given more than \$50 this year “members” – in other words – “member” is a term used to describe payment level, rather than a more complicated set of transactions.

Example: Complicated membership requirements

In this real world example, membership is based on other factors than only payments:

The Lewis and Clark County Search and Rescue Association (LCSAR) has four membership levels: Applicant, Associate, Member, and Reserve.

These membership levels are based on:

- The payment of dues;
- Required first aid, communications, search technique and survival training; a security screening;
- Meeting and incident attendance record;
- A board interview, and
- A vote by the general membership.

All members pay the same amount each year (\$1). What distinguishes the member levels are other attributes (e.g. First Responder training completed; attendance at general meetings and training sessions). LCSAR memberships are separate from payments, and are therefore recorded separately from payments.

Two different organizational scenarios, two different code structures.

There two different organizations have two very different types of membership programs, but ebasePro can be configured to record either type of membership.

In the LCSAR example, ebasePro can be setup to record attendance, training, vote results and payments. As members are reviewed each year, their annual record can be analyzed and their membership status adjusted as required.

In the SPC example, ebasePro can be setup to record payments only: as long as someone donates \$50, they can be called a member.

The most complicated part about setting up ebasePro is making decisions about how you want your organization to work. If you already have written rules (policies, business practices, protocols), you are much further along and it's a straightforward task to configure ebase. If you do not have written policies/protocols/business practices that describe how your organization operates, you will probably find that documenting the practices that exist will take far more time than it takes to configure ebasePro.

Email/Letter Template

You can imbed communication text into a code for use as an email or letter template.

Response Analysis

By imbedding campaign data into a code you can specify information for a response analysis report.

Flagging

You may use ebase's ability to display Log information in the metadata area to the right on the Contact overview screen. Specific information can be triggered to appear.

OVERVIEW: So how, precisely, do you go about creating a code?

It's a straightforward process:

First, set up a chart with your code titles and the bucket taxonomy. Fill in the blanks. An Excel spreadsheet is a useful tool here. There are sample code worksheets available in the ebase community library (membership required).

Then, when you are ready to start creating your code set, go to Admin>Codes and start entering your codes into the Code Generator.

SETTING UP YOUR ORGANIZATION'S CODE CHART

- 1) **Create your code titles.** Look at the processes and data you collect or use everyday and write up a preliminary list of names for those things. A spreadsheet sure comes in handy here.
- 2) **To Define or Not To Define the code buckets...**

Since every code must have a unique title, it isn't necessary to make each code unique through choosing bucket values that are unique. (See the section on "Details: The Code Definition Screen" for information on the default bucket values.)

That's right, you don't have to set up a chart. You can just make code titles and be done. **However!** You will have harnessed only a part of what ebase can do for you. So read on, think about this, and discuss it with your colleagues.

The value of bucket values

Giving every code in your set a unique combination of bucket values can be very useful when searching for groups of Log entries based on more than one code. Additionally, using the code buckets to categorize and systematically organize your code set can make ebase easier for new users to learn and it can help you manage and make sense of a large set of codes. If you expect to use the buckets to organize your code set and to perform complex searches for Log entries more easily, you should set ebase to require unique bucket values for each new code.

ebase uses the string of eight code buckets to identify a code within the context of other codes.

The bucket values operate like color-codes in a filing system. When users add an entry for a contact, the entry information will automatically be "filed" in ebase according to the code bucket values.

Code buckets can be used to define lists that can then be displayed in various reports. Think of them as an index for the stuff you want to track about your contacts. If all membership payment codes start out with the buckets Payment|Dev|Mbr you can easily search for all membership payments by searching for the first few buckets of a code.

Are your needs simple and basic?

If you don't expect to have a large or complicated code set, and if you can't imagine needing to search for several different kinds of Log entries at once, you may find the code bucket system burdensome. Providing unique bucket values for each code takes time and consideration, and makes creating new codes more difficult.

If your needs are basic and your code set is simple, set ebase to NOT require unique bucket values and leave buckets 2-8 empty when you create new codes. You can always adopt a code bucket system later, and set ebase to require unique bucket values at that time.

CREATING CODES IN CODE GENERATOR

The process of creating codes is simple. You can create a blank Code Generator record and fill in all the details of your new code, or you can duplicate an existing code that's similar to the one you wish to create, and then edit your new duplicate.

NOTE: It's best to be consistent about the type of detail you store in each bucket. To help with consistency, ebase includes recommended labels for the code buckets. Absolute consistency is hard to achieve, so be prepared to make a few exceptions to the rules you adopt about which details to store where.

A final note: Defining codes is one place where the KISS principle rules ("Keep It Simple Smarty"). It's pretty easy to over-analyze how complicated your internal procedures are. Start with a small code set, see how it works for your organization, then add/modify your codes as you get used to working with ebase. It helps to have someone who's developed code sets before to review your basic code structure to point out flaws or details which might save you a lot of time and heartache later. The ebase support lists and forums are good places to get feedback on your code set—or—you can always hire a consultant to quickly review your codes to see if they can spot any problems.

To create a new blank code:

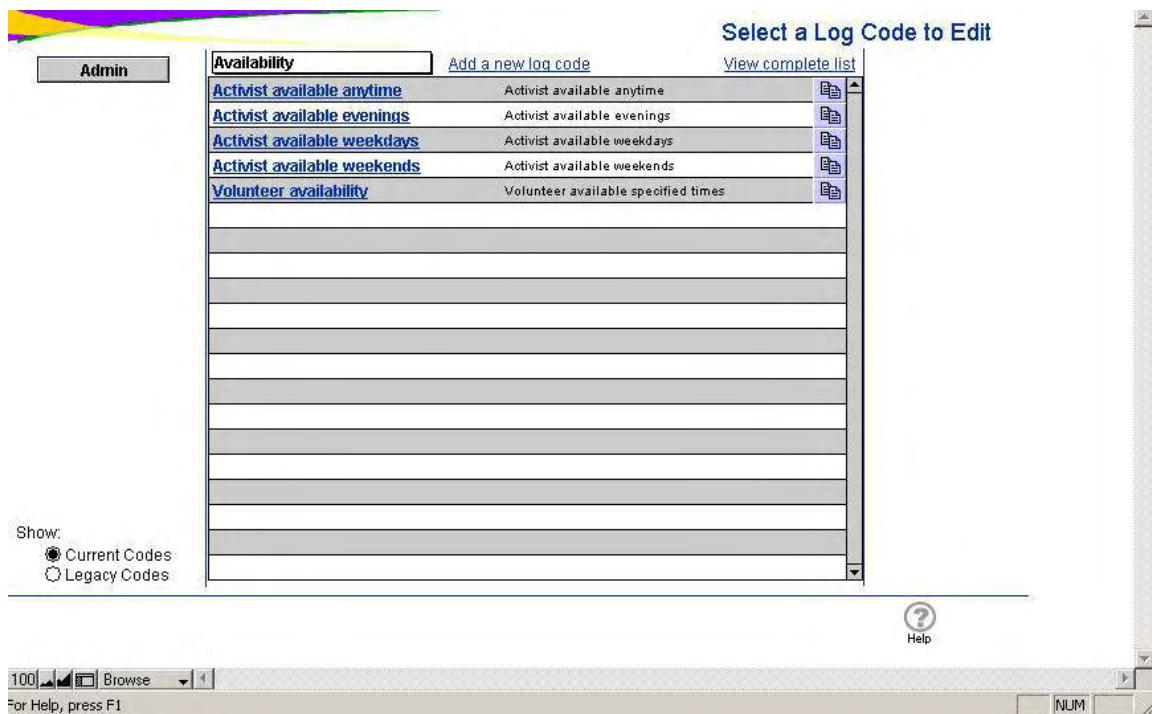
1. Go to Admin>Codes
2. Click on the "Add New Code" URL
3. Fill in the code definition form

To create a new code by duplicating an existing code:

4. Go to Admin>Log Codes
5. Locate the existing code most like the one you wish to add.
6. Click the duplicate code button. This is the button to the right of the code's title and description, under the link that reads "View Complete List."
7. Edit the new code's details as necessary.

That's it. With each new code you define, you can start tracking a new kind of information in ebase.

Here's what the process looks like:



Admin>Log Codes

Add a new code

DETAILS: THE CODE DEFINITION SCREEN:

Here's how one activist organizer explains how to use the sample code classes:

- **Action** – “Actions” record actions taken on your behalf by your constituents. By volunteering, writing decision-makers, hosting house parties and more, your constituents help you pursue your mission. “Action” entries are designed to record that kind of information.
- **Availability** - Use the Availability class to record when someone is available to help your organization by volunteering, attending committee meetings, attending public hearings, etc. When you need to schedule meetings and especially when you need to target a request for assistance quickly, it helps to know in advance when a constituent is available.
- **Communication** - Use the Communication class for recording what communications you send to the people in your database--phone calls, emails, letters, education and outreach mailings, action alerts, formal or chance meetings.
- **NOTE:** Use the Solicitation class for those communications intended to solicit payments or actions if you want to be able to track the response to those communications. (see Solicitation below)
- **Event** - When someone RSVPs or attends an event, use the Event class to record the information.
- **Interest** - One of the best ways to keep our volunteers and members happy is to give them what they want. In other words, we need to tell them about the issues they're interested in and give them the opportunity to take action in ways they like. Use the Interest class to record that kind of information, so you can easily find, for example,

everyone interested in air quality, or everyone who wants to work on a Get Out the Vote project.

- **Payment** - The Payment class captures information about most kinds of one-time payment you receive, whether it's membership dues, major gifts, or foundation grants.
- **Pledge** - Recurring, ongoing donations and membership payments get recorded here. For example, use the Pledge class to capture a credit card pledge of \$25 per month for 12 months made during your spring pledge event.
- **Role** - What are the roles that people play in relation to your organization? Use the Role class to record information about staff, board members, committee members, prospective donors, etc. Codes in this class are also what you would use to capture information about roles people play outside of your organization, but are relevant to your work--state legislators, members of the press, etc.
- **Skill** - What skill does this contact have that might be important to your organization? An arts organization would use code titles in the skill class to record the type of work an artist does (modern dance, sculpture, chamber music, etc.).
- **Solicitation** - The Solicitation class is for recording the communications intended to elicit payments from contact, such as membership invoices, direct mail to rented lists for membership prospecting, special appeals, etc. When entering a payment, you can also enter the solicitation code title, to link the payment back to the solicitation that generated it.

Bucket 2: OWNER

Who is responsible for managing the information captured by this entry? You MUST use Bucket 2 for Owner, but can develop your own names for this bucket.

Bucket 3: PROJECT

What are the projects that each owner needs to report results? This is typically used to tie entries being tracked with your organizations strategic management plan, or bookkeeping chart of accounts. Your organization could have projects like:

- Membership
- Outreach
- Events
- Watershed preservation

...and so on.

Bucket 4: List or Sub-Project

What group(s) of people does each entry involve? What sub-projects are included in this project?

Bucket 5: Type or Version

What type or version is this entry? If you create 4 variations of a donation request to mail to prospective members, this might be a place to record which message a particular individual received.

Bucket 6: Subtype or Method

This is a further refinement of Bucket 5—if you have 4 versions of an “ask” message, and you send the message out via letter, fax and email, you can record which delivery method you used for this entry.

Bucket 7: Date

Often the easiest way to create a “unique” code is simply to date it. This bucket allows you to use the date the code was created (or the entry is invoked – e.g. event attendance) as a distinguishing feature.

Bucket 8: Legacy Code

This bucket is designed to store the original codes of entries moved into ebase from other programs. In practice, it is frequently unused except for special reporting needs.

Whew! You’re done with creating the code structure. Now, there are few more choices you’ll need to make...

Code settings:

Select layouts for viewing and editing.

ebase has specialized layouts (forms) for entering data in log entries and viewing log entries in each code class. ebasePro uses an “enter and commit” process for entering data. Its permission structure allows some users to enter data, but not change it. In order to make this work, each code needs to be assigned a form to be used when entering data into an entry, and another form to be used when viewing the results of entered data.

Use the guide below to select an “edit” and “view” layout for each of your codes:

Layout Selection Guidelines

Class	"Edit with" Layout	"View with" Layout
Action	Edit Actions, 5	Edit Actions, 5
Availability	Note Edit; 9	Note Edit; 9
Communication	Communication Edit; 12	Communication Edit; 12
Event	Note Edit; 9	Note Edit; 9
Interest	Note Edit; 9	Note Edit; 9

Class	"Edit with" Layout	"View with" Layout
Payment (purchase0)	Purchase Edit; 11	Purchase Edit; 11
Payment (membership; gift)	Payment Edit; 1	Payment View; 2
Payment (on a pledge)	Payment Pledge Edit; 4	Payment Pledge View; 3
Pledge	Pledge Edit; 6	Pledge View; 7
Prospect	Prospect Edit; 8	Prospect Edit; 8
Role	Note Edit; 9	Note Edit; 9
Skill	Note Edit; 9	Note Edit; 9
Solicitation	Communication Edit; 12	Communication Edit; 12

NOTE: Email codes should use the following layouts:

Edit: Email

View: EmailReview (shows the text of an email, plus allows you to view the status header of an email after it's been sent)

Dropdown list: Make this an email code

Email codes have special properties. If you want to make this entry into an email code (capable of storing an email message), click on this box.

Dropdown list: Make this a legacy code

One of the problems of being able to track everything is that old stuff you needed to track ends up cluttering menus and pick lists. If you make a code a "legacy" code, it will disappear from some picklists, making data entry a simpler process.

Code Settings: Optional Features

On the right hand side of the screen, you'll see some "OPTIONAL SETTINGS" features. These checkboxes give your codes certain properties which will display data in different ways inside the ebase program.

A) Interface Attributes

URL: Setup Metadata

Takes you to a dialogue box that allows you to define the value of a metadata entry

Checkbox: Hide entry detail on entry

Allows you to add this log entry AND SKIP THE EDIT SCREEN. You bypass the need to enter details about a transaction or attribute.

Checkbox: Hide in Public History

Clicking the checkbox means that entries linked to this code will NOT appear in a contact's Recent Log Entries area of the Contact overview screen. We recommend not clicking this box for all codes except those in the Payment and Pledge classes.

Checkbox: View in Metadata Flag list

Checking this box will include the code in the pop-up list in ADMIN>Customize Metadata, so that you can select the code to create a metadata flag to appear in the metadata bar (on the right side of the Individual Contact overview screen), e.g., "Board Member - Current" or "Board Member - Former."

B) Payment/Pledge Management Attributes

Checkbox: Member/Recur Payment

Clicking the checkbox means that the code is considered a membership payment (or a recurring payment that is like a membership payment) and is used to determine currency of membership. It is used to set the Current Member flag in the metadata bar on the right side of the Contact overview screen

Checkbox: Non-Deductible Payment

Checkbox: View in Pledge list

Clicking the checkbox will include the code in the list of pledges available to choose from when you enter a pledge payment, so you can link the payment to its pledge.

Checkbox: Receipt template?

Makes this code a FileMaker Pro receipt template.

C) Solicitation Management attributes

URL: Setup

Takes you to a screen that allows you to enter data about the cost of a particular mailing or solicitation for use in the "Response Analysis Report". See the section on "Reports" for more details.

Checkbox: View in Solicitation list?

Selecting "YES" will include the code in the "From Solicitation" pop-up list on the Payment screen, so that you can link payments to the solicitations that generated them and then analyze response rates.

Unique Code

Use this to enter a short code that you may want printed in your solicitation letter, or on an address label to help you identify which solicitation generated a particular contribution, gift or action. An example might be something like:

"Mbr040102"

that gets printed on each mailing label of a return postcard, indicating that the solicitation was the January 2, 2004 Membership renewal solicitation.

D) Synchronize with ebase-CDML

This area is unsupported at this time.

E) Email management

URL: Setup

Click on this URL to enter text for a recurring email message. Includes spaces for both TEXT messages and HTML formatted messages (you'll need to paste in your own HTML code – ebase will not write HTML for you).

NOTE: You must check the box in the bottom of the left column "Make this an 'email' code?" before Setup will bring you to the email message screen.

Match to Unsubscribe Code ID

If you create a code to record when someone unsubscribes from a list via email and you want to have ebase automatically add a “unsubscribe” log entry to the Contact record you need to do one more step. Add the source _kCodeID of the entry being deleted. In addition, this will delete the source entry. See the section on Email for more details on the unsubscribe function.

Checkbox: Make this an email template?

Selecting "YES" will include this code in the pop-up list of email templates to be used when sending recurring email, such as member renewal reminders and messages to a list of subscribers.

F) Module Management (for use by developers of external modules)

The Module Management parameters let you use the ebase LOG database as a join table between Contacts and an external, custom designed module. You don't need to do anything here if you aren't developing or using a custom module.

Checkbox: Access with module

This checkbox tells a script in ebase to link a log entry with an external module. The Name field should record the name of the FileMaker Pro file that is the external module. The Parameter field should record any particular parameters you would want to transfer from ebase to an external module.

Tricks of the Trade:

- A code may be “retired”, it won't show up in picklists, by clicking “Yes” in the Legacy Code checkbox.
- To make an old solicitation disappear from the list of active ones, thus cutting down on the scroll time, unclick the field View In Solicitation List. The same advice goes for Pledges.
- You may edit a code after its been used to create Log entries; be sure to rebuild the log to apply the changes!

FINAL THOUGHTS ON CREATING CODES

Review your codes for uniqueness and consistency and revise if necessary.

Make sure that all code titles are unique. You may run into problems with data accuracy if they are not! You may need to go back and make changes after you've reviewed the list. It's much easier if you spot any duplications or inconsistencies now, before users begin to add entries to the Log.

Even though ebase doesn't require much consistency in the type of data stored in the code buckets, it's good to strive for consistency anyway because the reports shipped with ebase (or those you create later for yourself) will rely on certain categories of data being stored in certain buckets. Follow the general format set out by the code bucket labels to ensure that the reports included in ebase function properly.

Review your draft code set with everyone who will use ebase and revise if necessary.

ebase codes need to reflect the information tracking and reporting needs of everyone who will use ebase. You undoubtedly consulted other users when developing the codes, but take time to do a final code review with all who will use ebase or the reports it generates.

Editing codes

Whenever you need to edit an existing code, use ADMIN>Codes. You can make any changes you want, but be careful. ebase will ask you if you want to apply the changes you make to existing Log entries that have that code. If you say "Yes" you will change data in your LOG entries. This may not be a bad thing (depending on what you want to do), but it may take some time to complete. ebase gives you a choice of whether you want to change the data now, or at some other time.

NOTE: If you edit the code title or any of the values in the code buckets, you will eventually need to run the maintenance script "Fix Log Codes" to update all existing log entries that are based on the original code. Click on ADMIN>Maintenance Scripts. Without running the maintenance script, it will be impossible to find and report on entries that used the original version of the code.

CAUTION: If you change the code drastically, for example by changing the class from Payment to Communication, you may not be able to retrieve data related to the original class.

In order to maintain the integrity of the coding system, editing codes should be done by database administrators only.

Steps:

1. Click on ADMIN>Setup Codes.
2. Click the pop-up list at the top left of the data display area to select the class of the code you want to edit.
3. In the data display area, click the title of the code that you want to edit.
4. Edit the entries in the fields on the Edit Entry Code screen.
5. Click "OK".
6. If you edited the code title or any of the values in the code buckets, you will need to run the maintenance script "Fix Log Codes" to update all existing log entries that are based on the original code. Click on ADMIN>Maintenance Scripts.

Viewing all codes

To view a list of all your code titles, UniqueCodes, Descriptions and Buckets go to ADMIN>Setup Codes and click "View Complete Code List". This list will also show you how many entries are associated with each code. Since calculating the number of entries for each code is intensive, if you have a large code set, or if you have a lot of entries, it may take a while to show this screen.

Once you are viewing the list of codes, you can click on any highlighted column header to view codes sorted by that field.

Deleting a code

Deleting a code isn't as simple as it sounds. If you delete a code, you actually delete a definition for related Log records. It really messes things up if you delete codes and leave the Log entries behind. Therefore, if you try to delete a code in ebasePro, ebase will ask you if you really want to delete the code. If there are related Log entries, ebase will tell you that there are related Log entries. If you want to look at the related log entries, click on the button that says "View related log entries" to view Contacts who have that entry defined by that code in their records. If you find that you have Contacts using Log entries defined by a code you want to delete, you will have to:

- Delete the source log entries, then;
- Delete the code.

You can either do it manually (by clicking on the list of Contacts in the “View related log entries” portal), or, you can click on the “DELETE RELATED ENTRIES” URL in the left-hand corner of the screen.

BE CAREFUL: If you delete the related log entries, they cannot be recovered!! Make sure you want to delete those entries before you do so.

BACKUPS: Did we mention that you really need to have a good backup and archive system to use ebase? You should have an archival copy filed away somewhere so that you can retrieve those deleted entries if you decide later that you really need them.

Using your codes to actually do something: Working with Log entries

This is the Deployment stage.

Once the fundamental framework of creating codes is done, you can start doing the real work—building relationships with your constituents. You track the relationships by adding Log Entries to each constituent’s record—just like a ship’s captain tracked their journey’s progress over the sea by adding notes to the ship’s log each day. EbasePro uses Log entries to keep track of all actions, interests, communications, and payments that relate to that constituent.

For example, you may have an entry named "Interest in tabling" that you use to mark a contact that is interested in staffing a booth. Or you may have an entry named "Sent Welcome packet" to indicate when new contacts have been sent their new member information. One way of thinking about how codes and entries relate is to think of codes as the templates you use to enter entry details. A code is an instance of an entry. (This seems backward. Isn’t the entry a particular example of a code? The code is the template, the entry a singular case of a code which has many entries.) You, as administrator, set up the codes for ebase. As a user, you use those code templates to add entries to contact records.

Remember, start with the basics and build up as you become more comfortable with what ebase can do for you and as you learn what you really want from your database. Ask questions of the ebase community ((add in here the latest ‘how’)).

There are two simple ways to add an entry to a Contact:

1. The "Add Entry" link under "CONTACTS" in the left navbar initiates the process for storing a great variety of descriptive data about your contacts. Each entry stores a discrete chunk of information about a contact, such as member dues paid, gift donations made, actions taken on behalf of the organization, board membership, event attendance, or communications the contact received from you, etc.
2. In the Entry Portal in Contacts>Overview screen is a button that says: “Add Entry” Click on it, the select the entry you want to attach to your Contact.

VIEWING ENTRIES

All the entries attached to an individual can be viewed by scrolling through the Entries Portal in the Contact>Overview screen (unless the user’s privileges do not permit this).

To get the bigger picture:

- You may also look at ALL the entries for a contact on the Full History screen (CONTACTS>Full History).
- From this screen you may also view by Class by clicking on the button next to “Log Entries of Class” and choosing a class from the drop-down list.

- You can also view the contact's pledge history, payment history, and public history on separate screens.

ADDING ENTRIES

When you add an entry to a contact, you will be given the opportunity to edit details about that entry. Details may include priority, department, and deadlines. You may assign an entry to another user of ebase, and that entry will be shown in their To Do list. You may also add notes to an entry. (See "Additional Features" later in this chapter.)

It is possible to add entries to multiple contacts all at once using a batch process. However, with this process, you do not have the option to give details for that entry.

Steps:

1. First, on the Contacts>Overview screen, make sure you are viewing the contact record for which you want to add the entry.
2. Click on CONTACTS>Add Entry.
3. ebase tells you what the current entry is and gives you four choices:
 - "Found Set" – add entries to the current found set
If this log entry is what you want to add to ALL the records in your found set, click "Found Set."
 - "This Record" – add entries to the current record
If the current entry is the one you want to add to the current record, click "This Record".
 - "New Entry" – choose a new entry to add
Is the current entry the one you want to add to the current record? If not, select "New Entry" and choose the entry you want to use on the next screen. You will need first to select the code class, from the list at the left, which will then display to the right all possible entry codes within that class. Once you have chosen, click "OK".
 - "Cancel" – quit and return to Overview screen
4. You will be taken to a screen where you can edit the entry details, which vary depending on the class of entry you have chosen.
 - For most classes, you can enter details such as priority, assigned to (select a user name), the date to contact by, and the date that the person was contacted.
 - Payment entries will include payment-related details.
 - You may also enter notes for the entry.
 - Click "OK" once you are done.
5. You will now see the entry in the "Recent Entries" area in the Overview screen.

NOTE: If you cannot see the entry you just added, your user account may not allow you to see entries in the Recent Entries portal or the code for the entry you just added may not be marked as viewable in the public history. To resolve the issue your administrator should either allow you to view recent entries portal or mark the code as viewable in public history.

Managing organizational data with ebase codes

DEFINING MEMBERSHIP

ebase allows you to designate which code or grouping of codes will trigger a flag showing a contact's membership status (current, grace, or expired). For most organizations, this trigger includes a payment code.

To set a code to trigger membership status, place a check in the Member/Recur Payment box on the Add/ Edit Entry Code screen. When you add an entry or entries for a contact using that code, ebase will flag that contact as being a member.

Membership status is shown in the metadata bar at the right of the Overview screen. ebase calculates the contact's membership status based on the duration and/or payment amount set for that entry. A member will be flagged as current for the duration of the membership period. Once that period is over, the membership status is flagged as expired or grace, depending on whether you have set a grace period. Membership payments added without an entry amount or a zero will be marked as "comp" i.e. complimentary memberships.

You may want to set your own default membership duration in the Admin>Setup ebase area.

An important difference from prior ebasePro versions:

When adding an entry, your default membership period information is automatically updated to either the post date if new OR to the most recent membership payment date plus your membership duration (usually one year.)

If you don't want to use your default membership period information you can enter custom dates. This information is entered in the fields in the "Dues/Scheduled Payment" section of the Edit Payment Detail screen. To easily add an additional year to the Start Date, click the "Default Start Date" button.

Membership period can be defined in two places:

1. Payment Related Settings screen. (ADMIN>Setup ebase>Payment Settings.)
This allows you to set the default payment settings.
2. Edit Payment Detail screen when adding an entry. (CONTACTS>Add Entry)
When entering an entry, you can use the default payment settings designated above OR you can enter custom payment settings. This information is entered in the fields in the "Dues or Scheduled Payment" section of the Edit Payment Detail screen.

NOTE: In order for a member to be flagged as current, they must have an entry that is defined as a membership trigger and have a date in the Date Start field.

Steps:

1. First, set up the default membership duration. Click on ADMIN>Setup ebase and then click on the "Payment Settings" button.
2. In the "Default Recurring Renewal / Donation Duration" section, enter the duration period. The first field is a number, the second field is a membership period (Week, Month, Year, Day). The grace period is calculated based on the period of time designated in the membership period field. If you have a one-year membership with a grace period of one month, you would enter "12" "months" with a grace period of "1" month.

3. Click "OK" when done.
4. Now, edit a code so that it triggers membership status. Click on ADMIN>Add/ Edit Codes.
5. Select the "Payment" class at the left of the screen. Then, at the right, click on the code title you want to edit it.
6. Near the bottom of the Edit a Entry Code screen there is a checkbox labeled "Member/Recur Payment." Check this to set this code as a membership trigger. Click "OK" when done.
7. Click on the "Admin" button to return to the Admin Main Menu screen.
8. Add a payment -
 - For a New membership: the Start Date is automatically today's date and starts the membership.
 - For a Renewal or other membership: the State Date is automatically derived from the most recent prior membership payment plus your chosen membership duration.
9. After entering the payment, note that the metadata bar at the right of the Overview screen includes a current membership flag.

ACTION VS. EVENT ENTRIES

Sometimes it is not obvious when you should use an event entry and when you should use an action entry. The following definitions should clarify things:

- Use an Action: To record a contact's volunteer work or response to a call to action (e.g., attended hearing).
- Use an Event: To record a contact's actions related to an event you are hosting (e.g., RSVP, attendance).

Event is really a subset of Action. Use Event to track a constituent's activities that are connected to your event :Signup, Attendance (at a party, conference, training, etc.). For communications you send out about the event, use Communication or Solicitation classes (depending on whether you want to link the constituent's response to the solicitation and analyze the effectiveness of different methods of solicitation).

COMMUNICATION AND SOLICITATION CODES

Communication codes can be used to keep track of communications sent to your constituents. For instance you may want to keep track of all people who received an email inviting them to a fundraising dinner. You would attach a Communication entry to each contact that received the invitation.

A Solicitation entry is a special type of Communication entry. Use this class for entries for which you want to track the response. When you record a payment, you can attach the solicitation that generated the payment to that entry. You need to do this in order to analyze renewal rates and other response rates.

To recap:

- Use a Communication: To record communications you send to contacts (newsletters, thank-yous, phone calls)
- Use a Solicitation: To record communications for which you want to track the response (payments, calls to action).

Solicitation codes are special in another important way—they can be "retired". That is, they can be removed from the picklist that appears when you choose a solicitation response for a payment log. No other codes types can be "retired" at this time. The reason for this feature is to help simplify your life. The question it answers is how to curb code growth.

Payments have the potential to be the fastest growing set of codes. Imagine a different payment code for each type of payment as well as for each year and/or date. That could add up very fast and the payment picklist would become longer and longer.

So, in order to eliminate the problem of ever-increasing payment codes, one should use solicitation codes.

NOTE: This does not necessarily reduce your overall code set, but it will reduce the number of payment codes you need to choose from.

Here's how using Solicitation codes shrewdly can keep Payment codes in check:

First, create generic payment codes to keep track of all payment types. Second, create solicitation codes for every mailing, phone call or event that generates a payment. Third, when adding the payment to the contact record, associate the solicitation to the payment that it generated.

For instance, you may want to keep track of Membership Renewal Payments, New Member Payments and House Party Payments. Suppose you also have c3 and c4 donations coming in for the House Parties. You would make the following generic payment codes:

Membership Renewal, New Member, House Party c3, House Party c4

Say you do a mailing every six months to recruit new members, and have house parties every month. House party payment from one month sometimes come in two months later. To keep track of these types of payments, you will attach the generic House Party payment to the solicitation for that specific house party.

- NewMemberDrive 2002 Jun
- NewMemberDrive 2002 Dec
- HouseParty 2002 Jan
- HouseParty 2002 Feb, etc.

Say a new member joins, you add the payment entry New Member to the contact record. Then you look on the reply piece for the solicitation indicator and add that solicitation detail to the payment. You could create a new payment code to keep track of, say, each house party, but then you will end up having to choose from a list of 24 payment codes two years down the road. Instead, you should create a solicitation code for each house party that happens. You can regularly retire the solicitation codes from the solicitation picklist.

The point of using solicitation codes this way was to limit the number of codes you need to create and maintain--but in some cases, it will take fewer codes if you just use payment codes.

Some rules of thumb for when it takes fewer codes to keep track of payments:

- Don't use solicitation codes if you don't want to keep track of the mailing, phone call, event or other solicitation that generated the payment.
- Don't use solicitation codes if you can easily keep track of payments using payment codes only.
- Don't use solicitation codes if you get a payment infrequently and can keep track of when it came in by the date received. (e.g. if you get membership payments once a year)
- Don't use solicitation codes if you want the information in the solicitation code to be shown on the contact overview screen in the Recent History. (You will have to click on a payment to see the solicitation that generated it. NOTE: you CAN attach solicitation entries to contact records, but you don't need to do so.)

Sample codes and data that come with ebase

We recommend that you play around with contacts and entries before starting to configure your own code set. It is easier to make your own code set if you know how codes will be used to define entries.

A good way to do this is to take the tutorial outlined in the *ebasePro Getting Started Guide* (available on the ebase website at: <http://www.ebase.org/manuals>)

ebase ships with a sample set of data that includes codes for an imaginary organization called O.A.S.I.S. You can view these sample codes by going to ADMIN>Setup Codes and clicking on the "View complete list" link at the upper right of the screen. These codes are not generic. They reflect sample projects that an advocacy organization like O.A.S.I.S might have: an annual conference, a fundraising "gala" event, an advocacy program like land use planning, membership prospecting and renewal, special appeals, and a capital campaign. These codes give you data to use when practicing ebase's basic functions with the Getting Started Guide, and demonstrate how an organization customizes ebase's codes to reflect its own organizational processes and projects.

NOTE: Another copy of the generic code set is contained in the "CodeWorksheet.xls" document located in ebase community library (membership required). This Microsoft Excel worksheet is another tool you can use to draft your own code set.

Both sample code sets map some of the communities that nonprofits typically manage:

- the community of people who provide financial support (members and/or donors)
- the community of people who provide support through an investment of time and talent (volunteers and/or activists)
- the communities of people who help run the organization (board, staff, and committees)
- the community of people who help with or attend the organization's events.

Now, go out and have some fun! Taking time to manipulate the sample data can pay off generously in the long haul. Which is exactly what we all aim for—a good, long future.

Evaluation and Optimization

As you compile data about your efforts with your contacts you will want to evaluate your progress. Read through the Reports section for information on the various built-in ways of assembling data, including exporting it to outside programs for other types of analysis.

After you've evaluated your success, you can finesse your processes to produce more effective results. You can do this in any number of ways: adding new log entries, customizing additional profile information, streamlining the data entry or thank you process, etc.

These two stages, evaluation and optimization, are crucial to do regularly for the rest of your organization's life. You'll never out-grow the need to consider what you have done and to refine what you are doing. ebase is flexible enough to meet the challenges of most organizations.

For ideas about documenting your organization's policies and procedures, see the Appendix.

Additional Features:

ADD A “TO DO” ENTRY FOR YOURSELF OR SOMEONE ELSE

effectiveness When you login to ebase, on the main menu you will see a To Do list. This list is populated with entries that have been assigned to you. Click on the "Main" icon at the bottom of the screen to see the main ebase menu.

When you add an entry to a contact, you are able to assign the entry to an ebase user, including yourself. As soon as an entry is assigned to a user, that entry is listed on that user's To Do list. The To Do list will show contact name, entry name, due date and a short note for each entry assigned to a user.

You may assign an entry to someone when you first add that entry to a contact, or you may edit that entry and assign it to someone later.

Entries on your To Do list are arranged based on the date the contact was created. They are removed from your To Do list after you have entered a date in the "Contacted on" field in the entry details.

When you assign an entry to a user, it is advisable to include a reason for assigning the entry in the "Notes" field of that entry. This could be something as simple as "Please send thank you note to Mrs. Daly." The first 20 or so characters of this reason will be listed on the To Do list.

Not all entries can be assigned to a user. The administrator sets up these options.

Steps:

1. First, make sure you are viewing the contact record you want to work with in the Overview screen (CONTACTS>Overview).
2. Click on CONTACTS>Add Entry.
3. ebase tells you what the current entry is and gives you the choice of applying it or choosing a new entry. Click "New Entry".
4. Choose the class of the entry you want by selecting the appropriate radio button on the left. A list of entries under that class will be displayed in the window on the right. In this hypothetical example, select the class "Availability" and click "Activist available anytime" in the window.
NOTE: You may not have the same class or entry names in your database.
5. You will be taken to a screen where you can edit the entry details. Assign it to yourself and enter a date in the "Contact by" field. Write a short reason for assignment in the "Note" field. Click OK once you are done.
6. Click on the "Main" icon on the lower right of the screen or click "MAIN MENU" on the left navigation bar to go to the main ebase screen.
7. Notice that the entry is listed in your To Do list. Click on the entry to view it. Click on the contact name to go to that Contact record.
8. Add a date in the "Date Contacted" field and click "OK" to be taken back the Main screen. You will see that the entry has been removed from your To Do list.

THANK YOU FEATURES

In payment and pledge log entries there are fields to help you manage your thank you processing.

1. "(Thank You) Required?"

This field can be set as a default to "Yes", "No", or blank. You set the default in the code itself. You may edit this field at any time and

2. "Thank you sent?"

3. “Send Thank You” blue button

Error Message: “Hosed Codes”

You may notice a entry with a blank or “odd” title in your Entry History report, or in the Entry Portal on the Contact>Overview screen. If you click on that entry, you may receive the message:

"The Code originally attached to this entry has been lost, damaged or generally hosed. Do you want to keep this entry record or delete it?"

This messages means that the original code for this entry has been changed or deleted and those changes have not been reflected in the Log file.

To fix this, go to ADMIN>Maintenance Scripts and run the "Fix Log Codes" script.

If this does not work, the code may have been deleted. You may have to delete all entry instances of the code and re-add the new code to those entries.

This problem can be caused by importing codes into the CodeGenerator file after you have started adding entries to contact records. Or it can happen by accidentally deleting codes without deleting Log entries associated with those codes.

Chapter 9 Finds	1
Overview	1
Definition: The “Found Set”	1
Definition: Search Criteria	1
How to initiate the Find process	2
Where to Search: Contacts or Entries?.....	2
Definition: Multiple Found Sets.....	3
Starting a “standard” find.....	3
Working with Multiple Found Sets:.....	5
FileMaker Pro “Find” Operators.....	7
QuickFinds.....	8
Find All Contacts	9
Contact Finds, Details	9
Find Contacts Using Contact Data: Single Criteria	9
Find by Contact Based on Profile Data	10
Find Contacts Using Contact Data: Multiple Criteria.....	10
Log Entry Finds, Details	12
Find Contacts Using Entry Data: Single CriteriA.....	12
Find Contacts Using Entry Data: Multiple Criteria.....	13
Working with a Found Set in List View	15
Sorting a Found Set	15
Omitting from a Found Set	16
Custom CONTACT sorts	16

Chapter 9 Finds

OVERVIEW

ebasePro allows you to search for contacts based on contact name/address info and data stored as entries in the Log. You can search using single or multiple search criteria. EbasePro Finds are built on top of Filemaker Pro “find” functions. They use many of the features of Filemaker Pro’s “find” function, but also incorporate some techniques to allow you to search across databases, Contacts & Log for example, to combine search results into a single “found set”.

Definition: The “Found Set”

The “found set” is based on the “search criteria” that you entered and it is the set of records (names or entries) you get when you run a “find” in ebase. The number of records in your found set is always displayed on the third line of the metadata bar at the top right of the Individual Overview screen. This line reads, “Record X of Y in found set.” The second number (Y) is the number in your found set.

If you are viewing a found set on the List screen, the number of records in your found set is displayed at the top-middle of the screen on the first line.

Definition: Search Criteria

Search criteria are data values you use to find records in ebase. For example, if you want to find all contacts in the state of Montana, your search criterion is “MT” in the “State” field. If you want to find all contacts in Montana whose last names begin with T, your search criteria are “MT” in the State field and “T” in the Last Name field.

In ebasePro, you can perform finds based on:

- **Contact information:** e.g., all contacts who live in Maine, all contacts named Bob.
- **Entries:** e.g., all contacts who are interested in a particular issue or program.
- **Contact information *and* entries:** e.g., all contacts that live in Maine and are interested in a particular issue or program.

How to initiate the Find process

You initiate the find process by one of the following:

- clicking on CONTACTS>Find
- click on CONTACTS>Quickfind in the left navigation bar
- click the "Find" icon at the bottom of the screen

If you wish to find all the records in your database, click on "Find All" at the bottom of the screen.

Where to Search: Contacts or Entries?

Personal contact data is stored in Contacts, and data about your relationship with Contacts is stored as Log "entries".

When you first start a search, ebase will ask you whether you want to search in "Entries" or "Contacts". If you choose "Contacts" you will be able to search on fields that are related to contact information. For example, you can search by:

- Included in Contacts: Name, phone, email information
- Primary and secondary addresses (physical locations)
- Organizational and/or Family information
- Demographic data such as gender, income, education (located under "Profile Data")
- Add date, most recent pledge amount and date (located under "Other Fields")
- Summary fields like member status, total of payments last year, last pledge date

If you choose "Entries" you will be able to search on fields related to entry information, which is stored in the Log file. For example:

Included in Log:

- payments
- membership status
- interest in volunteering
- skills
- and whatever else you wish to track!

If you want to search by both entry criteria and contact criteria, you need to work with **multiple found sets**.

Definition: Multiple Found Sets

When you do an initial search in ebase, a set of records are returned which are based on the search criteria you entered. This is the initial found set and it is a single found set. If the single found set gives you all and only the records you need, you are finished. If, however, you need to add records to or remove records from this initial found set, you will need to perform multiple searches, each of which will yield its own found set. These multiple found sets are used to alter the contents of the initial found set. More on this later (see working with multiple found sets later in this chapter).

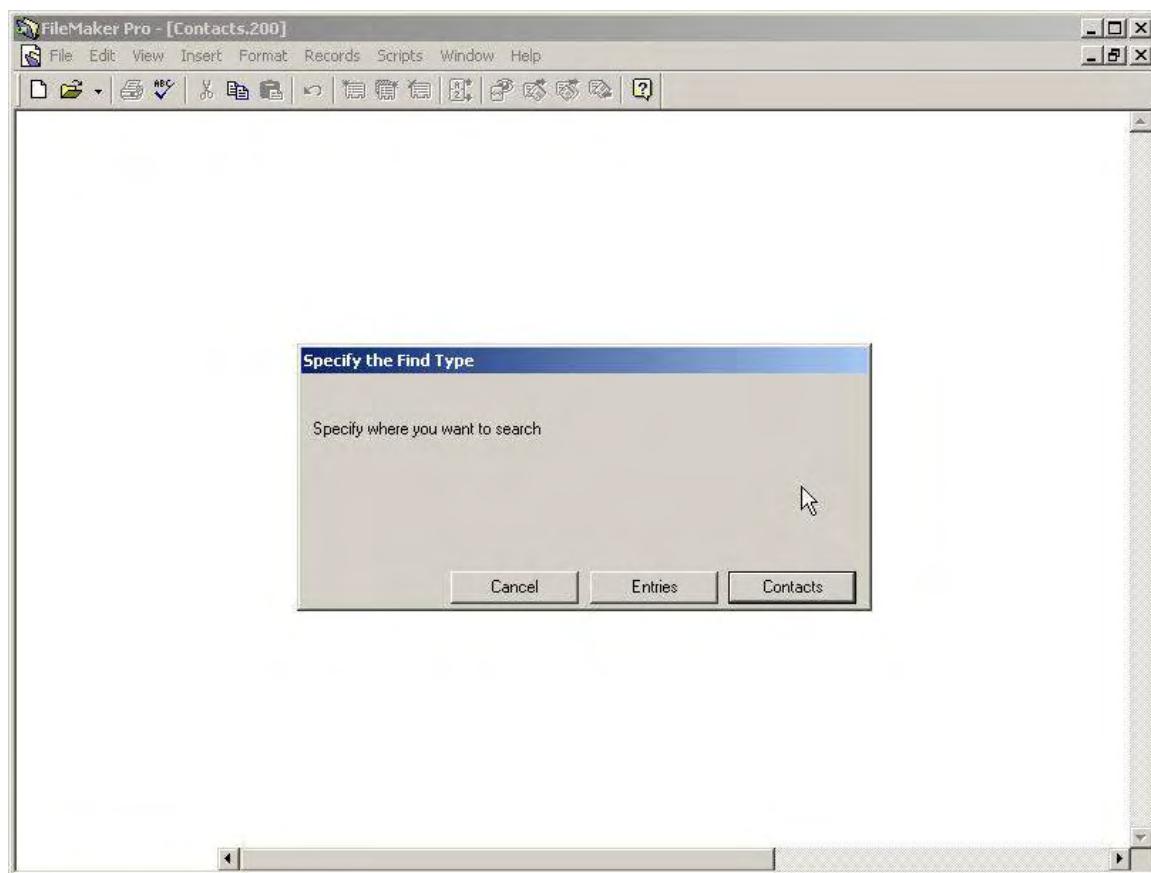
Before you perform a find or run a report, it's important to be clear about what kind of results you want: Contact information (a list of names), or entry information from Log (a list of entry details) If you need to have a "find" operation return Entry information, you need to run one of the various reports in the Reports module (many of which only produce entry data).

NOTE: A "FIND" always returns Contact information. If you want entry detail, use the reports module.

Starting a “standard” find

To start a standard ebase find, go to Contacts>Overview and either click on "Find" in the left-hand navbar, or click on the icon that looks like a magnifying glass at the bottom of the screen. This will invoke the find process.

You will be asked if you want to use search in Contacts or Entries. Choose one or the other.

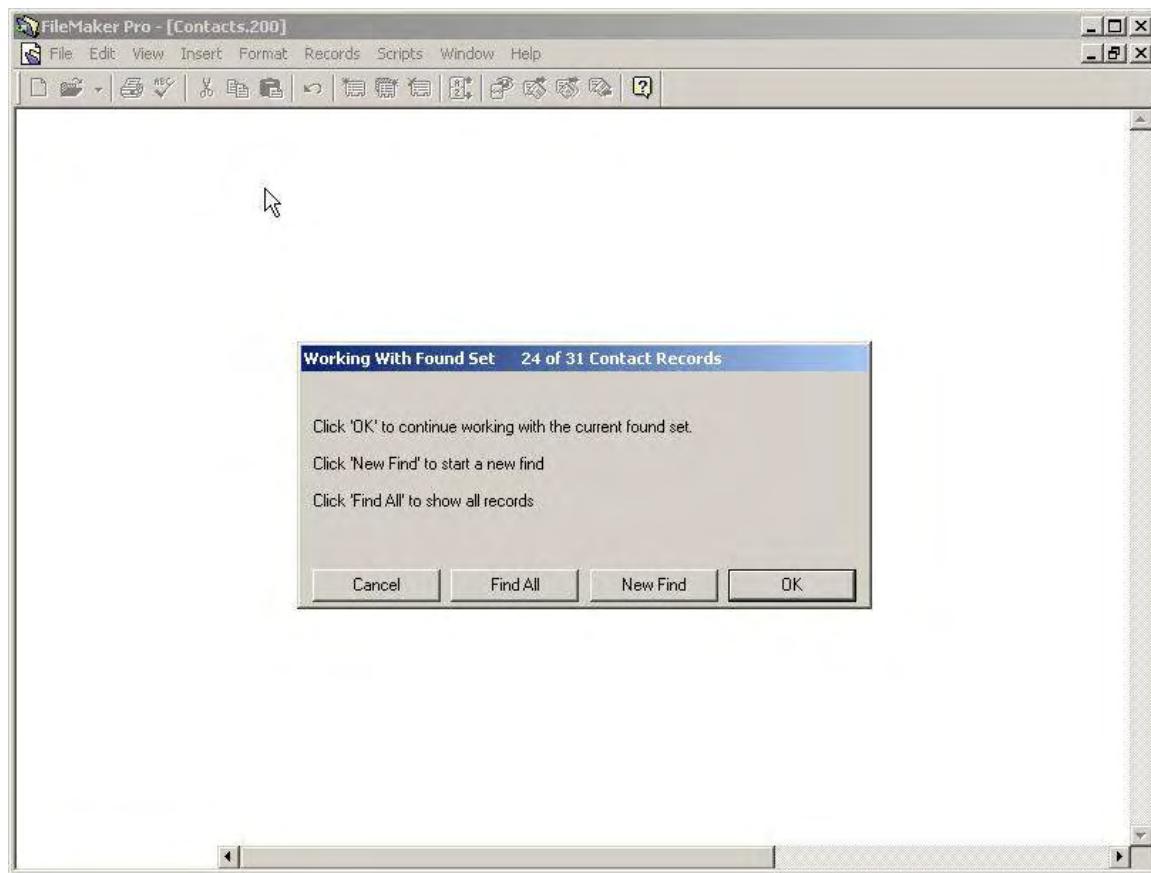


Find dialog

If you do not have a current found set then, depending on whether you are searching for contacts or entries, you will be presented with a blank template to “find a contact” or “find entry data” accordingly.

If you have a current found set, the next dialog box will ask you to make a choice from the following options:

- If you wish to add to (or subtract from) the current found set based on your next find, click on “OK” to continue working it.
- If you wish to start over with a fresh find, click on “New Find”.
- If you wish to find all the records in your database, click on “Find All”
- If you wish to totally cancel the find, click on “Cancel”.



Find dialog: Log find with a current found set.

NOTE: If ebase ever encounters a “null” find, that is, a find based on criteria that does not exist in your database, it may return one of two possible found sets:

1. All of the Contact records in your database (if you did a “New Find” and ebase found nothing), or
2. Your last found set (if you kept the current found set).

This can produce confusing results. Just remember, if you get an odd result from your search, chances are pretty good that you have just tried to find something that doesn’t exist in the database.

Working with Multiple Found Sets:

When you do a find, ebase asks whether you want to save the found set created by your previous search in order to keep working with it. This feature helps you build complex searches using multiple criteria, and it allows you to expand or narrow the initial found set with each successive find operation.

The Expand / Drill Down / Omit Logic

The Expand/Drill Down/Omit options are used in searches involving multiple search criteria.

After you enter your first search criteria, ebase asks whether you want to finish the Find now ("Done") or "continue working with the current found set" by searching "Entries" or "Contacts". If you go on to create another found set by searching Entries or Contacts, ebase then gives you the option to "Expand" the first found set, to "Drill Down" or to "Omit".

- If you choose "Expand," ebase adds together the two found sets. Contacts in the final found set will fit EITHER your first search criterion OR your second criterion, but they don't have to meet both.
- If you choose "Drill Down," ebase finds the contacts that meet BOTH the first criterion AND the second criterion. Each and every contact will have to meet BOTH criteria to be in the final found set.
- If you choose "Omit," ebase finds the contacts in your first set that don't meet the second criterion. Each contact in the final found set will meet the first criterion and NOT meet the second criterion.

Another way to think about the Expand / Drill Down / Omit operation is to picture the two found sets as circles in a Venn diagram (oh no! New Math!).

"Expand" vs. "Drill Down"



Both circles equal the "expanded" found set

Found Set 1 are people who live in New York. Found Set 2 are people whose last names begin with "A". The Expanded found set is both found set 1 and found set 2 (People who live in New York plus people whose last name begins with "A," regardless of where they live). The Drill Down found set is the intersection between found set 1 and found set 2 (People who live in New York whose last name begins with "A"). The Omit found set is found set 1 minus found set 2 (People who live in New York whose last name does NOT begin with "A").

When you choose "Expand," you search for all the contacts in both circles. It doesn't matter whether the circles have any contacts in common. The circles might overlap or they might not. It doesn't matter, since you want all contacts in both circles.

When you use "Drill Down," you search for ONLY those contacts that appear in BOTH circles. You hunt for the intersection of the two circles, the portion where they overlap. You want only those contacts that sit in the overlapping portion of the two circles.

Finally, if you choose "Omit" you search for those contacts that appear in Circle X BUT NOT Circle Y. The final set is the first circle, minus where it intersects with the second circle.

FileMaker Pro “Find” Operators

ebase uses FileMaker's structure for performing finds. This includes a set of find operators to use when entering find criteria:

<	Less than
<=	Less than or equal
>	Greater than
>=	Greater than or equal
=	Word match
...	Range, as in "1/2/2002...6/2/2002." This will find all records between 1/2/2002 and 6/2/2002
!	Duplicates. If you enter ! in a field, Filemaker will find exact matches
//	Today's date
?	Invalid date or time
@	One character wildcard
*	Zero or more characters (the “wildcard”)
" "	Literal text (what you insert inside the quotes)
==	Field content match

You can use these symbols whenever you perform an ebase find to help you locate the exact records you want.

Here are some examples that show how to use the FileMaker find symbols. These examples use hypothetical data to illustrate the process. You will need to substitute search criteria that relate to your own data to practice the Find processes.

1. Click on CONTACTS>Find.
 - a. Choose "Contacts" when ebase asks you where you want to search.
 - b. If you are asked if you want to start a new search, click "New Find"
 - c. Enter "*" (without quotes) in the Email address field then click "Find". When asked if you are done, click "Done"
 - d. You will see the found set of all contacts that have data in the "Email Address" field.
2. Click on CONTACTS>QuickFind.
 - a. Enter "s" (without quotes) in the "Go To" field, then click "OK".
 - b. The List screen displays the found set of all contacts whose first or last name starts with "s."
3. Click on CONTACTS>QuickFind.
 - a. Enter "=Smith" (without quotes), then click "OK".
 - b. The List screen displays the found set of all contacts whose first or last name includes the character string with "smith." Depending on the names in your database, the found set might include Bob Smith and Smith Baldwin.
4. Click on CONTACTS>QuickFind.
 - a. Enter "Smi" (without quotes), then click "OK".
 - b. The List screen displays the found set of all contacts whose first or last name includes the character string "smi." Depending on the names in your

- database, the found set might include Bob Smith, Smith Baldwin, Bill Smithson, and Sue Smiley.
5. Click on CONTACTS>Find.
 - a. Choose "Entries" when ebase asks you where you want to search.
 - b. If you are asked if you want to start a new search, click "New Find"
 - c. Click "Use Payment Data" on the left
 - d. Enter ">100" (without quotes) in the "Amount" field then click "back" to return to the main find screen. Click "Find". When asked if you are done, click "Done"
 - e. You will see the found set of all contacts who have made at least one payment in excess of \$100.
 - f. Click on the "Contacts" icon to go to the Overview screen. There, in the "Recent Entries" area, you can spot-check the payment data for records in the found set.
 6. Click on CONTACTS>Find.
 - a. Choose "Entries" when ebase asks you where you want to search.
 - b. If you are asked if you want to start a new search, click "New Find"
 - c. Click "Use Payment Data" on the left.
 - d. Enter a date range in the "Period End Date." Enter a range during which you know some memberships will expire. Use "" to indicate the range between the two dates, such as "9/1/20019/30/2001" (without quotes). Then click "Back" to return to the main find screen.
 - e. Click "Find." When asked if you are done, click "Done."
 - f. You will see the found set of all contacts whose memberships expire during the date range you selected.
 - g. Click on the "Contacts" icon to go to the Overview screen. There, using the "Recent Entries" area, you can spot-check the payment data for records in the found set.

QuickFinds

The "Quickfind" feature is the quickest way to find a person in your database. This feature allows you to find a specific person by any string of characters in the Contact Name field (NameFirst plus NameMiddle plus NameLast for individual records; Family names for Family records, and Organizational names for Organization records). You simply enter all or part of the name you want to find in the Quickfind search box and ebase will look for contacts whose names, first or last, begin with the letter or letters that you specify.

TIP: Filemaker Pro uses a variety of “search operators” that help you refine your find operations. The FileMaker find symbol for an exact match, two equals signs (==), comes in handy when looking for exact spelling of names in ebase.

EXAMPLES:

Here some examples of how to use Quickfind, with and without the “=” . These examples use hypothetical data to illustrate the process. You will need to substitute search criteria that relate to your own data to practice this Quickfind process.

- If you enter "==Smith" (without the quote marks), you would get a found set of all names that contain the exact name "Smith." You would not find "Smith-Wesson".
- If you enter "Smith" without the quote marks, you would get a found set of everyone whose name includes the letters "smith". This would include contacts with the last name of Smith and contacts whose first or last name begins with "Smith," such as Smithy Blender or Bill Smithson or James Smith-Wesson.

- If you enter "Bob Smith" without the quote marks, you would get the found set of all names that include the separate character strings "bob" and "smith." You would get records for Bob Smith, Bobby Smith, and Bob Smithson, if these names were in your database.
- If you enter "==Bob Smith" (without the quote marks), you would get the found set of all names that include the character string "bob smith." You would get records for Bob Smith, but not for Bobby Smith, if these records were in your database.
- If you enter "Smi" with no quotes, you would get a found set of all the names that contain the character string "smi." The found set would include names such as Bill Smithson, Smithy Blender and Karen Smile, assuming these names were in your database.

NOTE: The "Quickfind" feature always searches from the whole set of records. If you want to search within an existing set, you will need to use the "Find" feature.

Steps:

1. On the left navigation bar, Click on CONTACTS >Quickfind. Or enter the keyboard command for Quickfind: Control+4 (on Windows) or Command+4 (on Mac)
2. Enter the contact's last name (or the beginning portion of the name) in the pop-up window and click "OK". If you want to find an exact name, use the FileMaker find symbol "=" for an exact match.
3. If more than one contact name matches your search criteria, ebase displays a list of names that meet the criteria. Click the contact's name on the List screen to go to the Overview screen for that contact.

Find All Contacts

Use the Find All feature to create a found set that includes all contacts in your database. To do this, use the "Find All" button on the lower right-hand portion of the screen.

Steps:

1. Click on "Find All". Then, Click "OK" to go to the CONTACT screen or, click "Go To List" to see a list of all the records.
2. To verify that all records have been found check the top of the List screen or, the top-right of the overview screen. Make sure total number of records in the search matches the total number of records in the database.

CONTACT FINDS, DETAILS

Find Contacts Using Contact Data: Single Criteria

The "Find" feature is located on the left navigation bar and at the bottom of the screen icon bar (the magnifying glass icon). Either way initiates the find process by which you can query the database based on contact name, location, address, email, and phone data.

Finding contacts using a single search criterion is the simplest type of search you can do.

Steps:

Here is an example that shows how to find contacts using contact data based on a single criterion. This example uses hypothetical data to illustrate the process. You will need to substitute a search criterion that relates to your own data to practice the Find process.

EXAMPLE: Find all contacts who have an email address.

1. On the left navigation bar, click CONTACTS>Find.
2. Click "Contacts."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set or start a new search. In this example, click "New Find."
4. To find all contacts who have an email address, type "*" (without quotes) in the Email field and click "Find". (The asterisk is a wildcard character.)
5. ebase will tell you how many records it found ("your current set is") and ask whether you want to finish the Find now ("Done") or combine this found set with another search for contacts or entries. Click "Done."

Find by Contact Based on Profile Data

The "Find" feature on the left navigation bar under CONTACTS initiates the Find process by which you can query the database based on profile (demographic) data and add date/time, as well as contact name, location, address, etc.

Steps:

Here is an example that shows how to find contacts using based on profile data (and state data). This example uses hypothetical data to illustrate the process. You will need to substitute search criteria that relate to your own data to practice the Find process.

EXAMPLE: Find all female contacts in California.

1. On the left navigation bar, click CONTACTS>Find.
2. ebase will ask you to specify where you want to search. In this example, click "Contacts."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set ("OK") or start a new search ("New Find"). Click "New Find."
4. On the Find a Contact screen, enter "CA" (without quotes) in the "State" field.
5. Click "Use Profile Data" on the left. Enter "F" (without quotes) in the "Gender" field. Click "Back" to return to the Find a Contact screen.
6. Click "Find" to return the results of your search. ebase will ask whether you want to finish the find now ("Done") or combine this found set with another. Click "Done."

Find Contacts Using Contact Data: Multiple Criteria

The "Find" feature on the left navigation bar under CONTACTS initiates the find process by which you can query the database based on contact name, location, address, email, phone, address preference, and entry data. You can enter multiple criteria for your search.

There are four general methods of searching by contact data using multiple search criteria:

1. Enter all search criteria within the same find
2. Enter different search criteria with separate finds and use the "Drill Down"option. Use this method when searching for contacts that must meet BOTH criteria at the same time, i.e., each contact must fit both the "X" criteria AND the "Y" criteria. Example: Find all contacts in Maine who also have an email address.
3. Enter different search criteria with separate finds and use the "Expand" option. Use the "Expand" method when each contact can meet EITHER the "X" criteria OR the "Y" criteria. Example: Find all contacts who live in Maine and all contacts who live in

- California. You always need to use separate finds when you want to find EITHER "X" or "Y"
4. Enter different search criteria with separate finds and use the "Omit" option. Use the "Omit" option when each contact must meet "X" criteria but NOT "Y" criteria. Example: Find all contacts who are interested in volunteering, but NOT if they live in Massachusetts. You always need to use separate finds when you want to find "X" but NOT "Y."

Steps:

Here are some examples that show how to find contacts using contact data and multiple criteria. These examples rely on hypothetical data to illustrate the process. You will need to substitute search criteria that relate to your own data to practice the Find process.

EXAMPLE ONE: Find all female contacts in Maine who have email addresses (enter all search criteria within the same find).

1. Click CONTACTS>Find or click the "Find" icon at the bottom right of the screen.
2. ebase will ask you to specify where you want to search. In this example, click "Contacts."
3. ebase may ask whether you want to work with a found set created from a previous Find ("OK") or to start fresh with a new found set ("Start New Find"). Click "Start New Find."
4. Enter "ME" (without quotes) in the "State" field and enter "*" (without quotes) in the Email field. (The asterisk is a wildcard character. For more information, see "FileMaker Finds: Symbols to Use.")
5. Click "Use Profile Data" on the left menu to go to the Contact Profile screen. Enter "F" in the Gender field. and Click "Back" to go back to the Find a Contact screen.
6. Click the "Find" button in the upper left corner of the screen.
7. ebase asks whether you want to finish the Find now ("Done") or combine this found set with another. Click "Done."

NOTE: This Find method yields the same results as the "Drill Down" method described below.

EXAMPLE TWO: Find all female contacts in Maine who have email addresses (enter different search criteria with separate finds and use the "Drill Down" option).

1. Click CONTACTS>Find on the left navigation bar.
2. ebase will ask you to specify where you want to search. In this example, click "Contacts."
3. ebase may ask whether you want to work with a found set created from a previous Find ("OK") or to start fresh with a new found set ("Start New Find"). Click "Start New Find."
4. Enter "ME" (without quotes) in the State field and enter "*" (without quotes) in the Email field. Click Find.
5. ebase asks whether you want to finish the Find now ("Done") or combine this found set with another. Click "Contacts" to enter your additional criteria. (Any additional finds you create will be combined with the original found set of contacts from Maine with an email address.)
6. Click "Use Profile Data" on the left menu to go to the Contact Profile screen. Enter "F" in the Gender field. and Click "Back" to go back to the Find a Contact screen.
7. Click the "Find" button on the top left. ebase will ask you if you want to "Omit," "Expand," or "Drill Down." Choose "Drill Down."
8. ebase will ask if you want to add another find or finish. Click "Done" to see the results of your find.

TIP: This can be done without using two separate finds. See Example One above.

EXAMPLE THREE: Find all contacts who live in Maine and all contacts who live in California (enter different search criteria with separate finds and use the "Expand" option).

1. Click on CONTACTS>Find on the left navigation bar or click the "Help" icon (magnifying glass icon) at the bottom right of the screen.
2. ebase will ask you to specify where you want to search. In this example, click "Contacts."
3. ebase may ask whether you want to work with a found set created from a previous find ("OK") or to start fresh with a new found set ("Start New Find"). Click "Start New Find."
4. Enter "ME" (without quotes) in the "State" field then and Click the "Find" button on the upper left.
5. ebase asks whether you want to finish the Find now ("Done") or combine this found set with another (created by searching "Entries" or "Contacts"). Click "Contacts" to enter additional Contact criteria.
6. Enter "CA" (without quotes) in the "State" field and click "Find."
7. ebase asks how you want to work with the two found sets. Choose "Expand" to return the results of BOTH finds--contacts who live in California and contacts who live in Maine.
8. ebase will ask if you want to add another find or finish. Click "Done" to see the results of your find.

EXAMPLE FOUR: Find all male contacts in California who DO NOT live in San Diego (enter different search criteria with separate finds and use the "Omit" option).

1. Click CONTACTS>Find or click the "Find" icon (magnifying glass icon) at the bottom right of the screen.
2. ebase will ask you to specify where you want to search. Click "Contacts."
3. ebase may ask whether you want to work with a found set created from a previous Find ("OK") or to start fresh with a new found set ("Start New Find"). Click "Start New Find."
4. Enter "CA" (without quotes) in the State field.
5. Click "Use Profile Data" on the left menu to go to the Contact Profile screen. Enter "M" in the Gender field. and click "Back" to go back to the Find a Contact screen.
6. Click the "Find" button in the upper left corner of the screen. This find will return a list of male contacts who live in California.
7. ebase asks whether you want to finish the Find now ("Done") or combine this found set with another (created by searching "Entries" or "Contacts"). Click "Contacts" to enter the last criterion.
8. Enter "San Diego" (without quotes) in the "City" field. Click the "Find" button.
9. ebase will ask how you want to work with the two found sets. Choose "Omit" to return the results of the first find (males who live in California) WITHOUT the results of the second find (contacts who live in San Diego.)
10. ebase will ask if you want to add another find or finish. Click "Done" to see the results of your find.

LOG ENTRY FINDS, DETAILS

Find Contacts Using Entry Data: Single Criteria

The "Find" feature on the left navigation bar under CONTACTS initiates the Find process by which you query the database based on entries stored in ebase. In the simplest type of find, you enter only one criterion for your search.

Examples of a "single criterion" entry find are:

- Find all current members
- Find all contacts who are interested in a particular issue
- Find all contacts who made a payment on [fill in date or date range]

Steps:

Here are some examples that show how to find contacts using entry data and a single criterion. These examples rely on hypothetical data to illustrate the process. You will need to substitute a search criterion that relates to your own data to practice the Find process.

EXAMPLE ONE: Find current members.

1. On the left navigation bar, click on CONTACTS >Find.
2. You will be asked to specify where you want to search. In this example, click "Entries."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set or start a new search. In this example, click "New Find."
4. You will be brought to the Find an Entry screen. Click on "Use Payment Data" to go to the screen with the current member flag. Enter "current" (without quotes) in the "Member Status" field. Click the "Back" button to go back to the Find an Entry screen.
5. On the Find an Entry screen click the "Find" button on the upper left to return with the results of your search.
6. ebase will tell you how many records it found ("your current set is") and ask whether you want to finish the Find now ("Done") or combine this found set with another (created by searching "Entries" or "Contacts"). Click "Done."

EXAMPLE TWO: Find all contacts who have made a payment greater than \$50 in 2001.

1. On the left navigation bar, click on CONTACTS >Find.
2. ebase will ask you to specify where you want to search. In this example, click "Entries."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set ("OK") or start a new search ("New Find"). Click "New Find."
4. You will be brought to the Find an Entry screen. Click on "Use Payment Data" to go to the screen with payment information. Enter ">50" (without quotes) in the "Amount" field and ">12/31/2000<1/1/2002" in the "DatePosted" field. Click the "Back" button to go back to the Find an Entry screen.
5. On the Find an Entry screen click the "Find" button on the upper left to return with the results of your search.
6. ebase will ask whether you want to finish the Find now ("Done") or combine this found set with another. Click "Done." Click "Done."

EXAMPLE THREE: Find all contacts who are interested in a particular issue. This is for example only--you can perform this type of find this using any log entry in your database

1. On the left navigation bar, click CONTACTS >Find.
2. ebase will ask you to specify where you want to search. In this example, click "Entries."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set ("OK") or start a new search ("New Find"). Click "New Find."
4. In the "Code Title" field, select the name of the interest entry you are looking for Click "Find" to return your results.
5. ebase will ask whether you want to finish the Find now ("Done") or combine this found set with another. Click "Done."

Find Contacts Using Entry Data: Multiple Criteria

The "Find" feature on the left navigation bar under CONTACTS initiates the find process by which you query the database by entry data. In more complex finds, you can enter multiple criteria for your search.

Examples of a "multiple criteria" find using entry data are:

- Find all contacts who are either current members OR who are interested in particular issue (an "Expand" type of find).
- Find all contacts who are interested in a particular issue who have contributed money to your organization (a "Drill Down" type of find).
- Find all contacts who are interested in particular issue who have never made a payment to you (an "Omit" type of find).

Steps:

Here are some examples that show how to find contacts using entry data and multiple criteria. These examples rely on hypothetical data to illustrate the process. You will need to substitute search criteria that relate to your own data to practice the Find process.

EXAMPLE ONE: Find all contacts who are current members plus all contacts who are interested in a particular issue.

1. On the left navigation bar, click CONTACTS >Find.
2. ebase will ask you to specify where you want to search. First you want to find all current members so click "Entries."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set ("OK") or start a new search ("New Find"). Click "New Find."
4. Click "Use Payment Data" on the left. Enter "current" in the "Member Status" field. Click "Back" to return to the main Find a Contact screen. Click the "Find" button.
5. ebase asks whether you want to finish the Find now ("Done") or combine this found set with another. You want to search for members who have a specific entry, such as an interest entry, so click "Entries."
6. In the "Code Title" field, select the name of the entry you are searching for, such as an interest in a particular issue. Click "Find" to perform the search.
7. ebase will ask how you want to combine the two found sets. Click "Expand" to find all contacts who are either current members OR those who have the entry you are searching for, such as an interest in an issue.
8. You will be asked if you want to continue working with the found set or view results. Click "Done" to view results.

EXAMPLE TWO: Find all current members who are also interested in a particular issue.

1. On the left navigation bar, click to CONTACTS>Find.
2. ebase will ask you to specify where you want to search. First you want to find all current members so click "Entries."
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set ("OK") or start a new search ("New Find"). Click "New Find."
4. Click "Use Payment Data" on the left. Enter "current" in the "Member Status" field. Click "Back" to return to the main Find a Contact screen. Click the "Find" button.
5. ebase asks whether you want to finish the find now ("Done") or combine this found set with another. You want to search for members who have the particular entry you are searching for, so click "Entries."
6. In the "Code Title" field, select the name of the entry you are searching for, such as an interest in a particular issue. Click "Find" to perform the search.
7. ebase will ask how you want to combine the two found sets. Click "Drill Down" to find all contacts who are current members AND have the entry you are searching for.
8. You will be asked if you want to continue working with the found set or view results. Click "Done" to view results.

EXAMPLE THREE: Find all contacts who are interested in a particular issue and who have never contributed money to your organization.

1. Click to CONTACTS>Find on the left navigation bar.
2. ebase will ask you to specify where you want to search. First you want to find all current members so click "Entries"
3. Unless you started the find with all records selected, you will be asked whether you want to work with the current found set ("OK") or start a new search ("New Find"). Click "New Find."
4. In the "Code Title" field, select the name of the entry you are searching for, such as an interest in a particular issue. Click "Find" to perform the search.
5. ebase asks whether you want to finish the Find now ("Done") or combine this found set with another. Click "Entries."
6. Click "Use Payment Data" and enter ">0" in the "Amount" field. Click "Back" to return to the main find screen and click the "Find" button to perform the search. This will find the contacts that have paid more than zero dollars.
7. ebase will ask how you want to combine the two found sets. Click "Omit" to find all contacts who have the entry you are searching for EXCLUDING those who have paid you money.
8. You will be asked if you want to continue working with the found set or view results. Click "Done" to view results.

WORKING WITH A FOUND SET IN LIST VIEW

The List screen allows you to see a list of contacts for the current found set. To reach the List screen, you may use the CONTACTS>List link on the left navigation bar or you may use the "List" icon at the bottom right of your screen. Contact information shown in this view is: Name, Organization, Title, Current Address, City and State, Zip Code, Email Address, Phone. And "Not a Duplicate".

Sorting a Found Set

You may sort the current found set on the List screen. You may sort by alphabetical or reverse alphabetical order by Name, Organization, City and State, Zip Code or Email address. You cannot sort by State alone from this screen (see Custom Sorts below).

The following is an overview of how ebase sorts records:

- **Sorting by Name:** This sorts by last name of individual and the first letter of a household's data (from the Sort Name field) or organization name.
- **Sorting by Organization:** When sorting alphabetically by Organization, ebase will list all contacts without an organization entry, and then will list all contacts with an organization entry. When performing a reverse alphabetical sort, the reverse is true.
- ***Sorting by City:** When sorting alphabetically, ebase will alphabetically list all contacts without an entry for City or State first, then it will alphabetically list contacts with an entry for the City. If the address for a contact does not contain a city, but does contain a state, ebase will sort that contact based on the state. When performing a reverse alphabetical sort, the reverse is true.
- ***Sorting by Zip Code:** This is a numerical sort based on the zip+4 code and not reversible.
- ***Sorting by email:** When sorting alphabetically, ebase will alphabetically list all contacts without an entry for email first, then it will alphabetically list contacts with an entry for the email. When performing a reverse alphabetical sort, the reverse is true.

TIP: Each new sort ignores all previous sort requests. For instance, it is not possible to sort by name AND email address.

Steps:

1. Go to CONTACTS>List on the left navigation bar to view a list of the current found set. Or click the "List" icon at the bottom of the screen.
2. Decide which column you want to sort by.
3. To sort alphabetically, click "(A-Z)" to the right of the column title (at the top.)
4. To sort reverse alphabetically, click "(Z-A)" to the right of the column title.

Omitting from a Found Set

You may omit a record from the found set by clicking in the box to the left of the contact name. The record has not been marked for deletion, it merely has been taken out of your work group.

Custom CONTACT sorts

You can get your results sorted in whatever order you want if your user account has access to the CONTACT>TOOLS menu. Go to CONTACT>TOOLS>Sort Contacts.

A dialog box will appear, and list the available CONTACTS fields on the left-hand side, and “sort fields” on the right hand side. To create a new sort order:

1. Find the field you want to sort on
2. Move the field into the right-hand window
3. Select how you want the sort to work: ascending, descending, or “custom” – based on that fields value list.

Keep in mind that you can sort CONTACT data by values in related fields (i.e. PCL>City or ContactRecordType).

CHAPTER 10 EMAIL	1
Email overview	1
Some caveats.....	2
Internet email basics	2
Configuring ebasePro to send and receive email	4
Establish organizational “role” email accounts.....	4
Configure ebase User accounts to match your organizational “role” accounts	4
Test your account configuration	6
Receive an email.....	8
Send an email to a list.....	10
Using ebasePro’s special incoming email processing features.....	17
Process Subscribes.....	18
Process Unsubscribes.....	22
Process Bounces	23
Process paypal receipts	24
The Goal: Use ebasePro to start a “virtuous cycle” with your constituency.....	27

Chapter 10 Email

EMAIL OVERVIEW

ebasePro has the ability to send and receive email using the SMTP and POP3 email protocols. To accomplish this, it uses two proprietary plugins: SMTPit and POP3it by CommUnity Systems.

Further, ebasePro has built-in email processes that allow you to:

- Send and record email sent to an individual
- Send and record email receipts
- Send and record (optional) customized email messages to lists of contacts
- Automatically add people to mailing lists and event lists
- Manage email lists and e-newsletters (using Log Codes)
- Process a large percentage of bounce messages received after you send email to a list of contacts
- Automatically create new contact records and payment records resulting from donations using PayPal online donation processing service.
- Automatically create new contact records and payment records as the result of any web-based transaction as long as that transaction produces a specially formatted email message.
- The Send/Copy link in the contact overview allows you to quickly send contact information via email to someone that needs the contact information, and allows you to record this as a log entry.

In short, ebasePro has the ability to help your organization manage its organizational email, but it is not intended to replace personal email clients like Outlook, Eudora or Entourage. Rather, it is intended to help your organization handle email that could be most productively managed in a place where everyone who has access to ebasePro can see what email transactions your organization has had with an individual Contact.

Some caveats

- Setting up the ebasePro email function requires that you understand how networks are setup, and how your organization's email system works. You will need to have a basic understanding of POP3 and SMTP (so that you can setup accounts correctly and troubleshoot any faulty transactions).
- If you plan to use the list broadcasting function of ebasePro, you will need to make sure that your internet service provider (ISP) will permit you to use their services to relay bulk email. If your ISP currently restricts the number of emails you are allowed to send at one time, there are a variety of options that your organization can pursue to overcome this obstacle. Check the ebase library for technical notes on this issue.
- Although you can send HTML formatted email from ebasePro, it does not have the ability to read HTML email. Any responses received in HTML format are saved to an external folder.
- You cannot directly open any attachments that come into ebasePro via SMTPit (a proprietary plugin). Attachments are saved to an external folder where they can be opened separately.
- There is no built in email virus filter for ebasePro. Most email viruses are passed as attachments, and since ebasePro cannot directly launch email attachments, it has – to date - been unaffected by email viruses and Trojan horses.
- ebasePro is not meant to be a replacement for a personal email client. ebasePro's email functions are setup to either:
 - Record messages to a single recipient
 - Record messages to a list.
- If you want to send an email to more than one person, you need to use the list broadcasting function. ebasePro does not record the contents of the cc: and bcc: fields in their respective Contact's record(s).

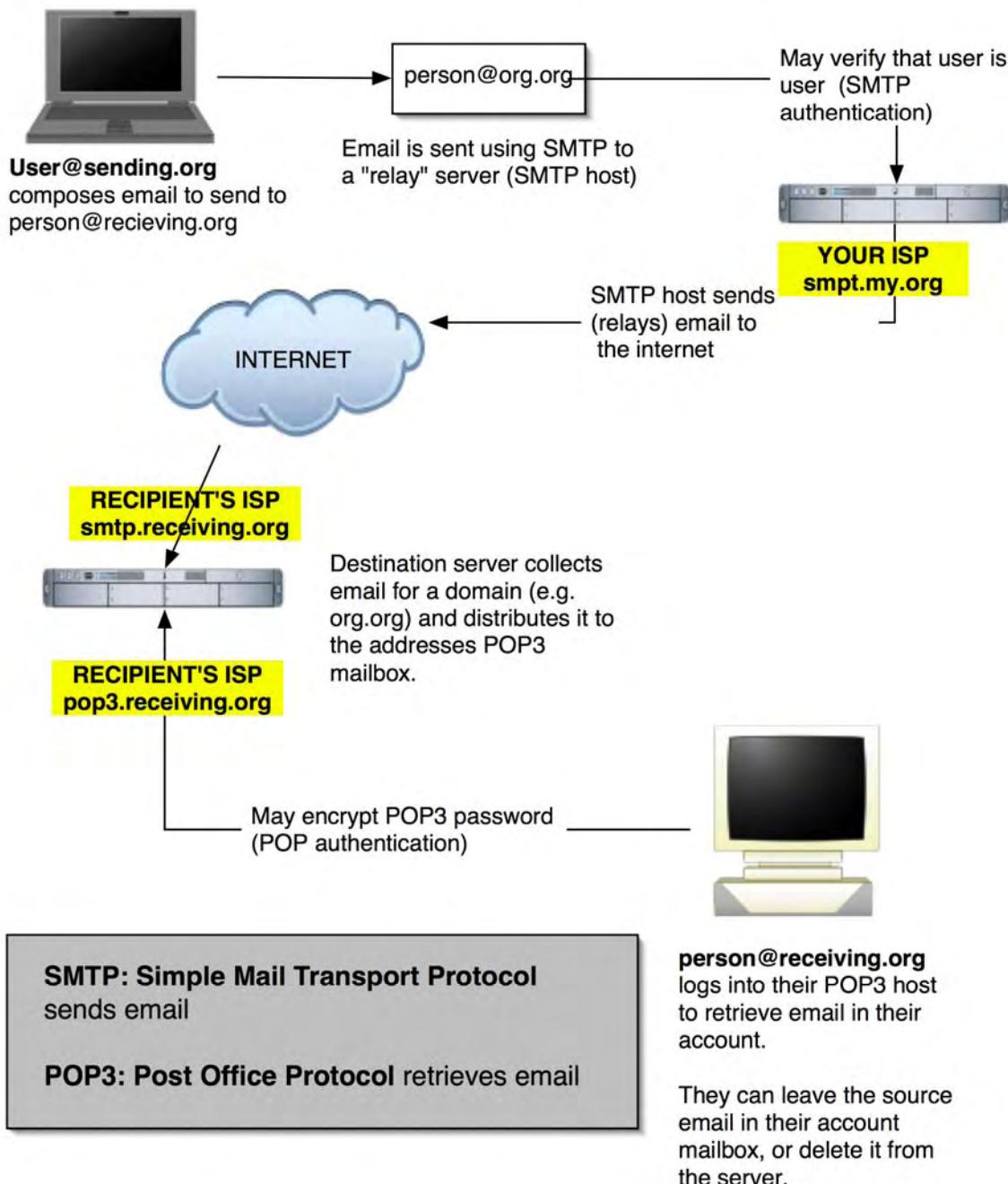
INTERNET EMAIL BASICS

It's important that you understand how email is sent and received over the internet before you setup ebasePro to send and receive email.

ebasePro uses the **SMTP** (Simple Mail Transport Protocol) and **POP3** (Post Office Protocol 3) protocols to send and receive email.

The illustration below shows how email is sent from one user connected to the internet, to another user.

How email is sent through the internet using SMTP and POP3



NOTE: ebasePro doesn't send email from FileMaker Pro directly. ebasePro uses a proprietary SMTPit plugin (installed when you install ebasePro) to move data from the FileMaker Pro templates to the internet. Similarly, ebasePro uses the proprietary POP3it plugin to login to a POP3 host, and import email data into FileMaker Pro records.

CONFIGURING EBASEPRO TO SEND AND RECEIVE EMAIL

To start using the email functions in ebasePro, you'll need to set aside some time to configure email accounts and do some testing. Here is an outline of the steps you'll need to take to get started:

1. Establish organizational “role” email accounts with your ISP
2. Configure ebase User accounts to match your organizational “role” email accounts
3. Test your account configuration
4. Receive an email
5. Send an email to a list

This section will cover each of these setup steps. The next section will illustrate some of the ebasePro email functions and how you can use them to help your organization communicate more effectively.

Establish organizational “role” email accounts

What is an organizational “role” email account?

ebasePro is not meant to replace personal email accounts, like “bob@ebase.org”. Rather, ebase is designed to manage email related to a particular organizational function.

For example, ebase staff members have their own personal email accounts, but they also share ebase “role” accounts:

- info@ebase.org -- used to respond to general ebase questions
- newsletter@ebase.org -- used to send out ebase newsletters and process related responses.
- donations@ebase.org -- used to manage donations to ebase.org

These email accounts are examples of “role” accounts. Multiple people may have access to the email in these accounts based on the time of day, or day of the week, but each account is setup to manage a particular business process used by ebase to manage the day to day work.

Your first task should be to determine what kind of organizational role email accounts your organization needs. We'll use the example of: newsletter@ebase.org and donations@ebase.org as the examples going forward.

Configure ebase User accounts to match your organizational “role” accounts

Once you've decided what kinds of organizational role accounts you need, you'll need to setup ebase User accounts that correspond with those role accounts.

Steps

1. Go to Admin>Users

2. Create a new user (e.g. "Newsletter")
3. Fill in all the information necessary to add this particular user.
4. Fill in the email account information for that user
5. Logout of ebase by clicking on the Login/Logout button on the lower left-hand portion of the screen

Add / Setup New User

<input type="button" value="OK"/> <input type="button" value="Cancel"/>	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; padding: 5px;">Login newsletter</td> <td style="width: 33%; padding: 5px;">Password newsletter</td> <td style="width: 33%; padding: 5px;">Privilege Level Admin</td> </tr> <tr> <td colspan="3" style="padding: 5px;">Name of User newsletter</td> </tr> <tr> <td colspan="3" style="padding: 5px;">UserNote This is the user account for sending and processing the email newsletter.</td> </tr> </table>	Login newsletter	Password newsletter	Privilege Level Admin	Name of User newsletter			UserNote This is the user account for sending and processing the email newsletter.			Permissions <input checked="" type="checkbox"/> See Recent Entries <input checked="" type="checkbox"/> See Log Entry details <input checked="" type="checkbox"/> See Payment detail <input checked="" type="checkbox"/> Add Contact <input checked="" type="checkbox"/> Add Log Entries <input checked="" type="checkbox"/> Edit Address <input checked="" type="checkbox"/> Run Reports
Login newsletter	Password newsletter	Privilege Level Admin									
Name of User newsletter											
UserNote This is the user account for sending and processing the email newsletter.											
Edit Default Log Code: <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; padding: 5px;"> Email Settings POP (receiving mail) <input checked="" type="checkbox"/> Off Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> EmailFooter <input type="text"/> </td> <td style="width: 33%; padding: 5px;"> Authentication <input checked="" type="checkbox"/> Off SMTP (sending mail) <input checked="" type="checkbox"/> None Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> Reply-to Address <input type="text" value="newsletter@sender.org"/> Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software </td> <td style="width: 33%; padding: 5px;"> Authentication <input checked="" type="checkbox"/> None SMTP (sending mail) <input checked="" type="checkbox"/> None Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> Reply-to Address <input type="text" value="newsletter@sender.org"/> Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software </td> </tr> </table>			Email Settings POP (receiving mail) <input checked="" type="checkbox"/> Off Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> EmailFooter <input type="text"/>	Authentication <input checked="" type="checkbox"/> Off SMTP (sending mail) <input checked="" type="checkbox"/> None Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> Reply-to Address <input type="text" value="newsletter@sender.org"/> Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software	Authentication <input checked="" type="checkbox"/> None SMTP (sending mail) <input checked="" type="checkbox"/> None Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> Reply-to Address <input type="text" value="newsletter@sender.org"/> Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software						
Email Settings POP (receiving mail) <input checked="" type="checkbox"/> Off Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> EmailFooter <input type="text"/>	Authentication <input checked="" type="checkbox"/> Off SMTP (sending mail) <input checked="" type="checkbox"/> None Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> Reply-to Address <input type="text" value="newsletter@sender.org"/> Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software	Authentication <input checked="" type="checkbox"/> None SMTP (sending mail) <input checked="" type="checkbox"/> None Host URL <input type="text" value="mail.sender.org"/> Login/Username <input type="text" value="newsletter"/> Password <input type="text" value="newsletter"/> Reply-to Address <input type="text" value="newsletter@sender.org"/> Alternate method for sending mail: <input type="checkbox"/> Pass single e-mail messages to default e-mail software									

6. Log back into ebase as the new user you just setup

Explanation of email account fields in the User record

- **Login/Username:** The username used by your email server to login to a particular email account
- **Password:** The password used by your email server to login to a particular email account
- **Reply-to Address:** The address to which replies will be sent. Sometimes this is different from the Login Username, sometimes it is the same.
- **POPHost URL:** The name of your POP3 host
- **SMTPHost URL:** The name of your SMTP host
- **POPAuthentication:** if your email POP3 host uses POP authentication, make this "On", otherwise, make it "Off"

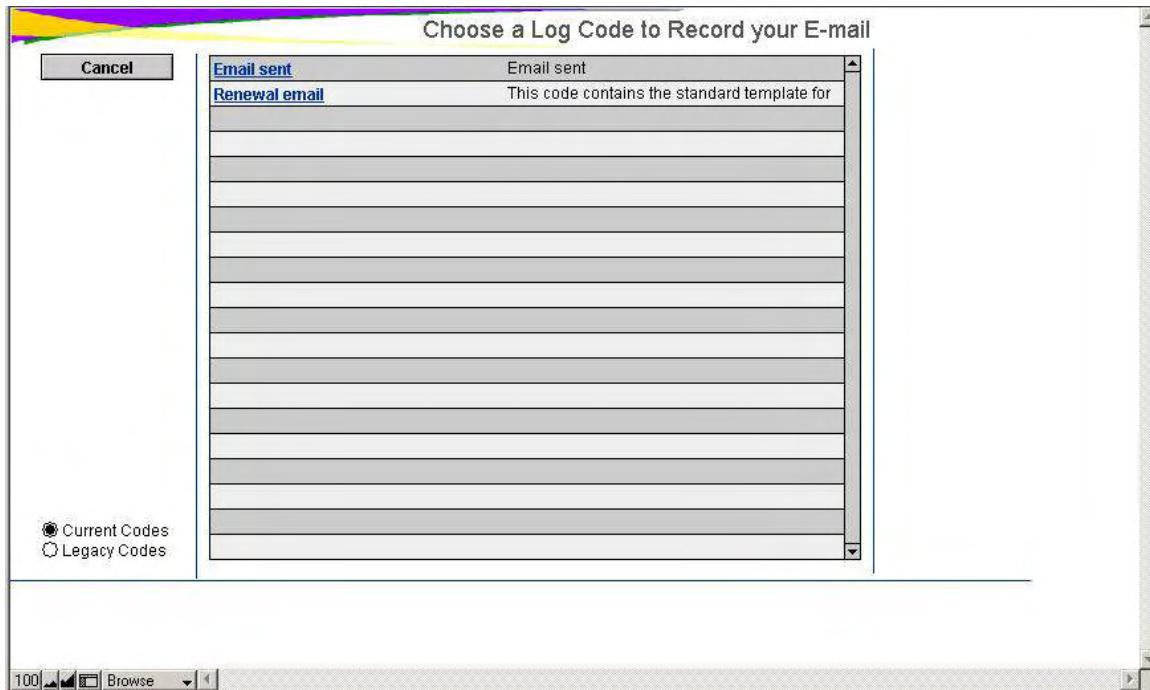
- **SMTPAuthentication:** If your SMTP server does not use SMTP authentication, set this to “None”. Otherwise, choose the appropriate authentication protocol (usually “Login”).
- **EmailFooter:** Enter any text you want to appear at the bottom of all your outgoing messages.

That's all there is to setting up a new email user account. Getting these settings right can be tricky, depending on how your organization sends and receives email. If you have problems, check the ebase community list archives to see the kinds of setup problems other folks have faced and resolved. Otherwise, your email ISP should be able to provide you with the proper POP and SMTP settings for your organization's email servers.

Test your account configuration

Steps

1. Log out of ebase, then log back in using your new user account's ebase username and password. This resets your account settings.
2. Go to Contacts>Overview
3. Create a new contact record to be your test recipient (you). Enter your personal email account.
4. When you have finished creating a contact record for yourself, click on your email address.
5. ebase will ask you to choose a log code to record your email. The default email installation gives you two choices:

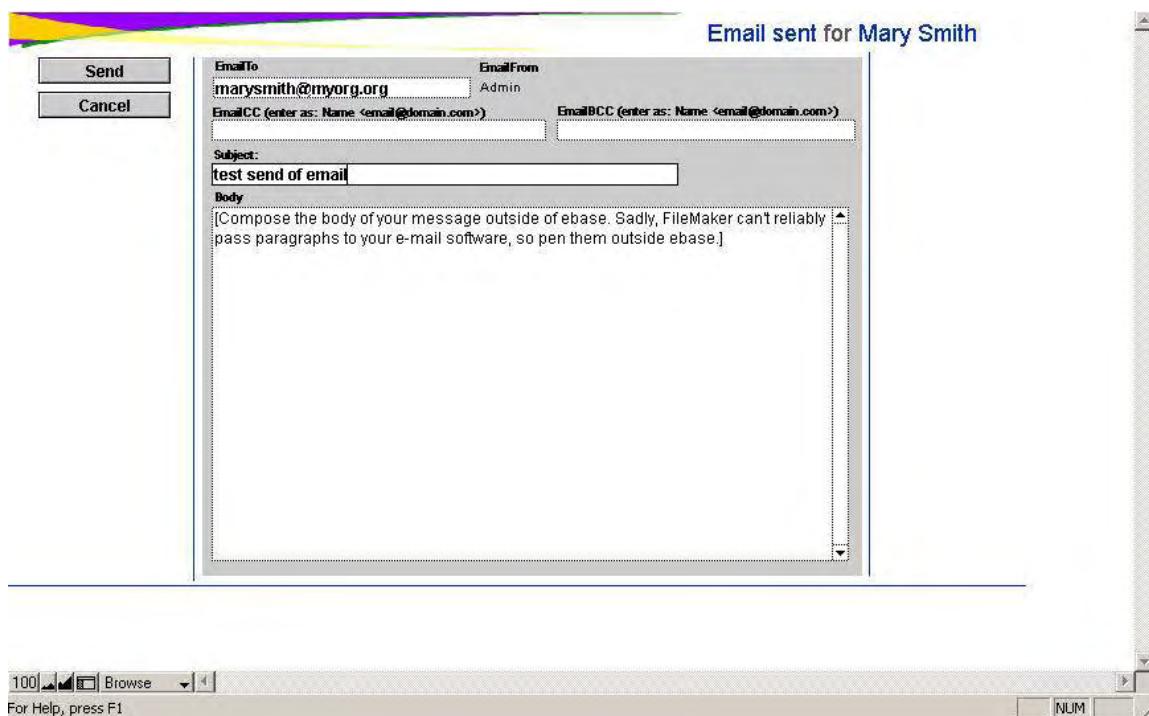


6. Click on “Email sent” (a code setup to create a generic email log entry).

- Enter a test email message. Please note that if you want to send the message to more than one person, ebase only records the message in the original contact's record.

NOTE: You can use the CC: field or BCC: field to add additional recipients. Separate the email addresses of multiple recipients using a comma. You can also use the angle bracket method for showing associated names. For example, you can manually enter additional email recipients using the following formats in the CC: and BCC: fields:

CC: Mary Smith <marysmith@an.org.org>, Jon Jones <jjones@jones.org>, tsmith@smith.org

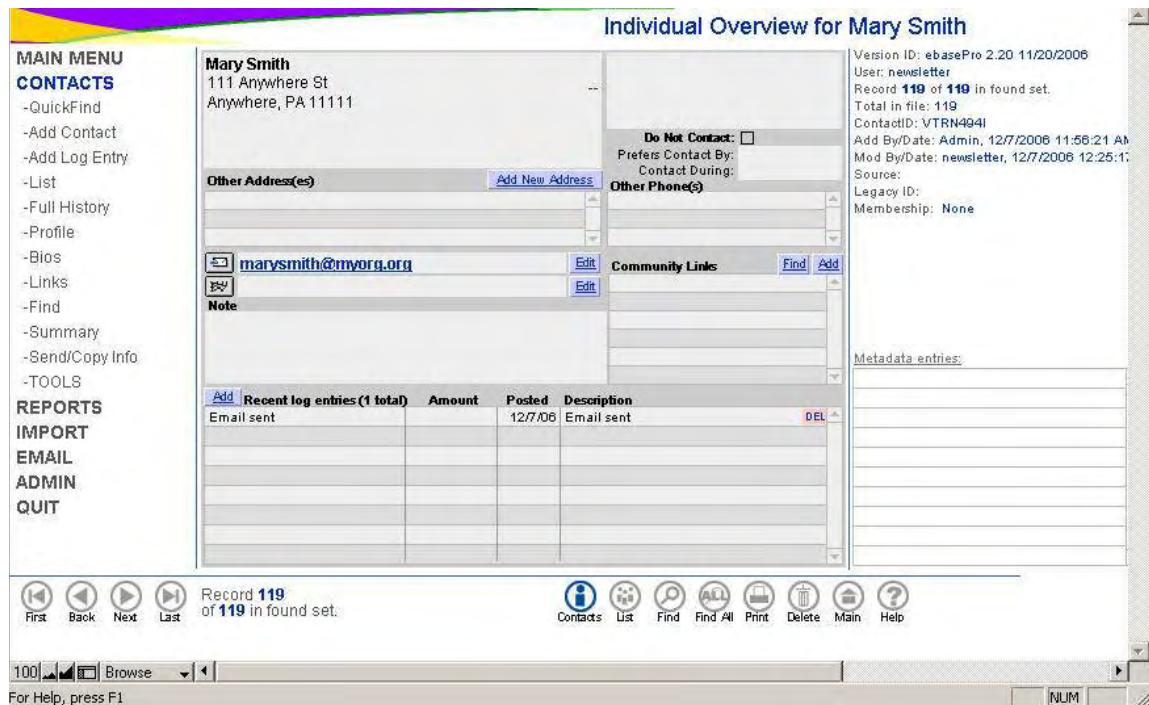


- If successful, you will get a dialog that says "Your email was sent". Click on "OK" to return to the Contact's record. You should see that the email you just sent is recorded in the "recent log entries list" for this contact.
- If not successful, you will receive an error message. ebase will still record the fact that the email was sent, but will mark it as being flagged for deletion to allow you to open the email and look at the status header to determine precisely why your email was not sent.

Depending on the error, you may need to reconfigure:

- Your ebase user account
- The email account preferences on your email server
- Any firewall or network addressing issues that may prevent the ebase SMTPIt plugin from communicating with your organization's SMTP server.

If you run into problems, a good place to turn for support is the ebase users email list or, if you need an immediate response, you can setup a remote support session (fee required) at
<http://www.ebase.org/>



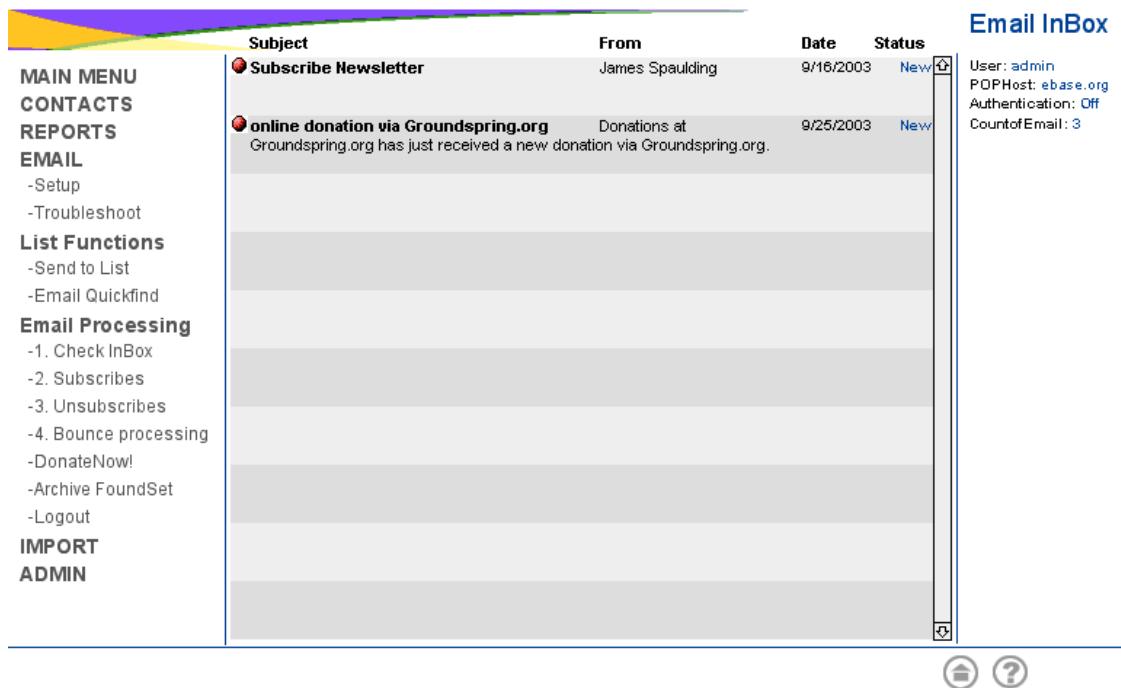
Receive an email

Steps:

1. To receive an email, simply login to ebase using the ebase User account that corresponds with the email account you wish to use (e.g. Newsletter).
2. Then, click on EMAIL in the left-hand navbar. You'll come to a screen that looks like this:



- To login to your email account, click on, “-1. Check InBox”. If you have mail in your email account, it will come in and look like this:



- To delete an incoming email, click on the pink “Del” button to the right of the subject header.
- To open the email, click on the subject header (in bold).

That's it, you've received email.

Problem with your configuration, you will be taken to a Troubleshooting screen that records the result of your last email transaction. Read the error message carefully for clues as to what might be going on.

NOTE: If a problem is encountered that that the ebase mail function cannot handle, both SMTPit and POP3it will give an error message that says, "Developers Password Does Not Match". This is a "generic" message that simply means there's an unknown problem. If you get this message, it typically indicates that something has gone wrong with the plugins. Quitting FileMaker Pro and ebase, then re-opening it resets these plugins so that you can continue to troubleshoot the problems.

Pay careful attention to the error messages. It's not uncommon to uncover email server and/or network configuration issues when you're setting up new email accounts.

Send an email to a list

Overview

Once you know that ebasePro is properly configured to send and receive email and that your server is properly configured to send messages to and receive messages from ebase, you are ready to send email to a list of contacts.

ebasePro offers two ways to send email to a list:

- Send email to contacts that have a specific log entry in their record. This will also create an automatic "unsubscribe" URL at the bottom of each email you send to allow your recipients to unsubscribe from the list you used to create the email.
 - For example, if you have created an email newsletter subscription code, and have attached subscription entries to contacts who wish to receive your newsletter, you can create a mailing list simply by doing a find for your subscription entry. ebase creates an automatic unsubscribe URL in each email. If the contact clicks on the unsubscribe URL, an unsubscribe message is automatically sent back to the sending email account. These unsubscribe messages can be automatically processed in ebasePro to remove people from email lists.
 - Send email to your "current found set." This allows you to send a broadcast email to anyone on your list of found contacts regardless of what find you used. You can do a multiple-step find using any criteria to arrive at a found set. However, emails sent using this method will not add an automatic unsubscribe URL to the footer of the message.
- Sending email to lists is easy once you have your email sending and receiving working properly. However...

Before you start, check with your ISP

ebasePro can send email to a list very quickly (short messages take less than half a second to send). However, if your internet service provider is not setup to handle large volumes of relayed email, you may run into problems.

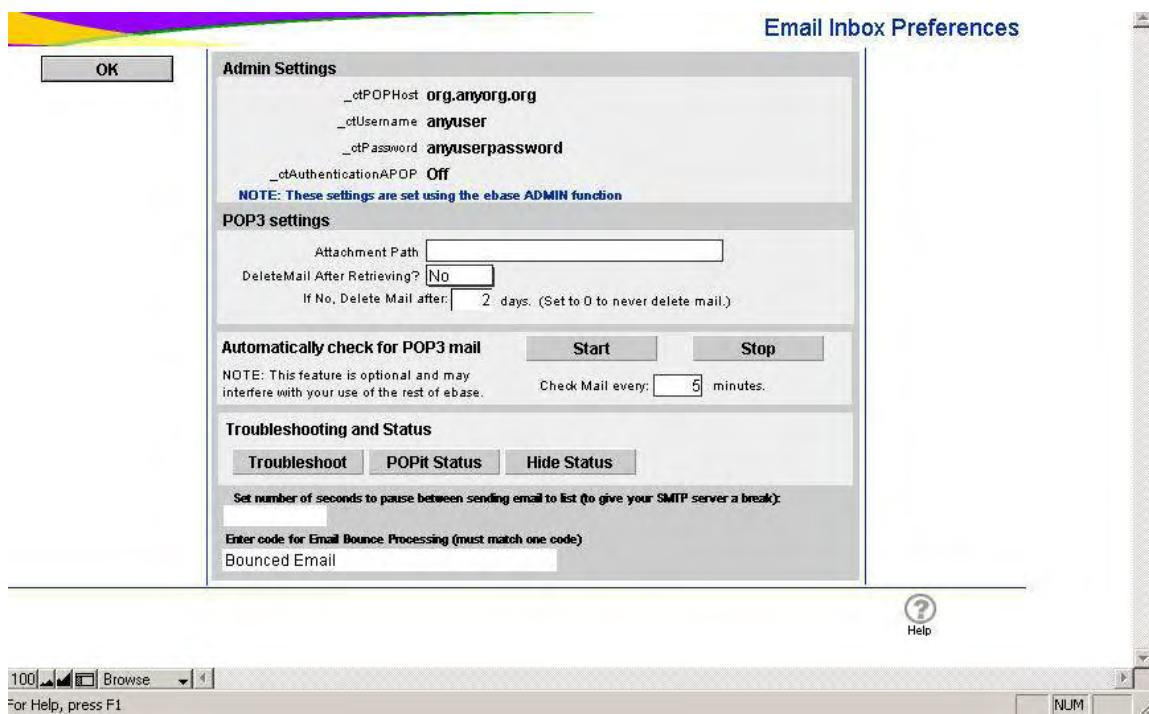
Many groups use a "consumer" level email package from their ISP. This gives them a few email addresses, a domain name and broadband internet access. What it does not provide is guaranteed bandwidth. Also, consumer level ISP packages frequently restrict the ability to send

mass emails. For example, to combat spam (unsolicited commercial email broadcasting) some ISP's restrict the number of broadcast emails that any user can send to 25 per hour.

If this is the case with your ISP, you will not be able to use the ebasePro email broadcasting feature until you have access to an SMTP relay server that will let you send a large quantity of emails to your list. If you attempt to send more than your ISP's limit, they will bounce the messages back to you. If you continue to send, they may shut off your ability to send email. Sometimes overcoming these restrictions is simply a matter of getting a "business" account with your ISP. In other cases it may mean using another service to provide your SMTP relay. Either way, if your ISP restricts your ability to send broadcast email, you need to find this out before you start sending broadcast email via ebase.

If you find yourself in this position, a great place to find help is the ebase support email lists and forums. There you'll find people who have successfully addressed this problem and are willing to give you tips on how to go about getting access to an unrestricted SMTP relay server.

NOTE: If your ISP is set up to allow you to send the volume of email you wish to send, but you continue to have problems with your ISP's mail servers bouncing your mail immediately, there's a chance that ebase is sending email faster than your ISP's servers can handle it. You can "throttle back" the volume by setting the number of seconds to take for each email sent in the Email>Setup screen where it says "Set number of seconds to pause between sending email to list (to give your SMTP server a break)" (see bottom of screen).

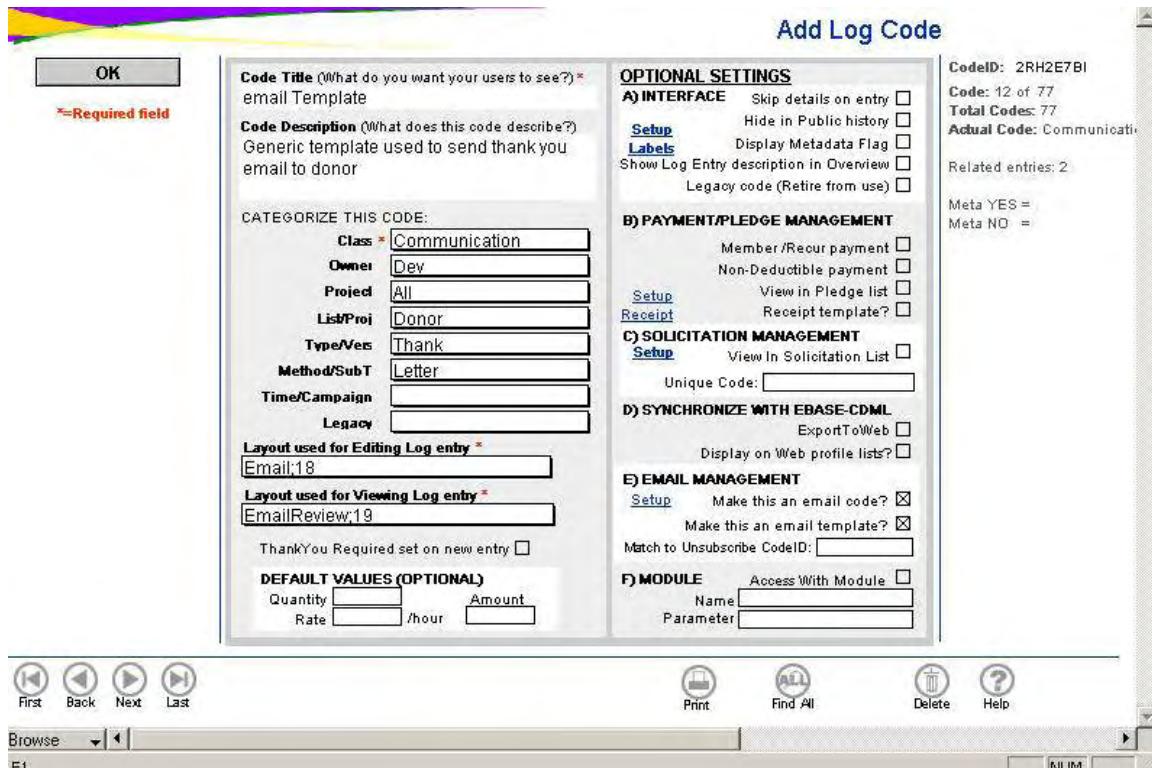


Steps for sending email to a list:

Step 1: Create an email code that is a "recurring email message."

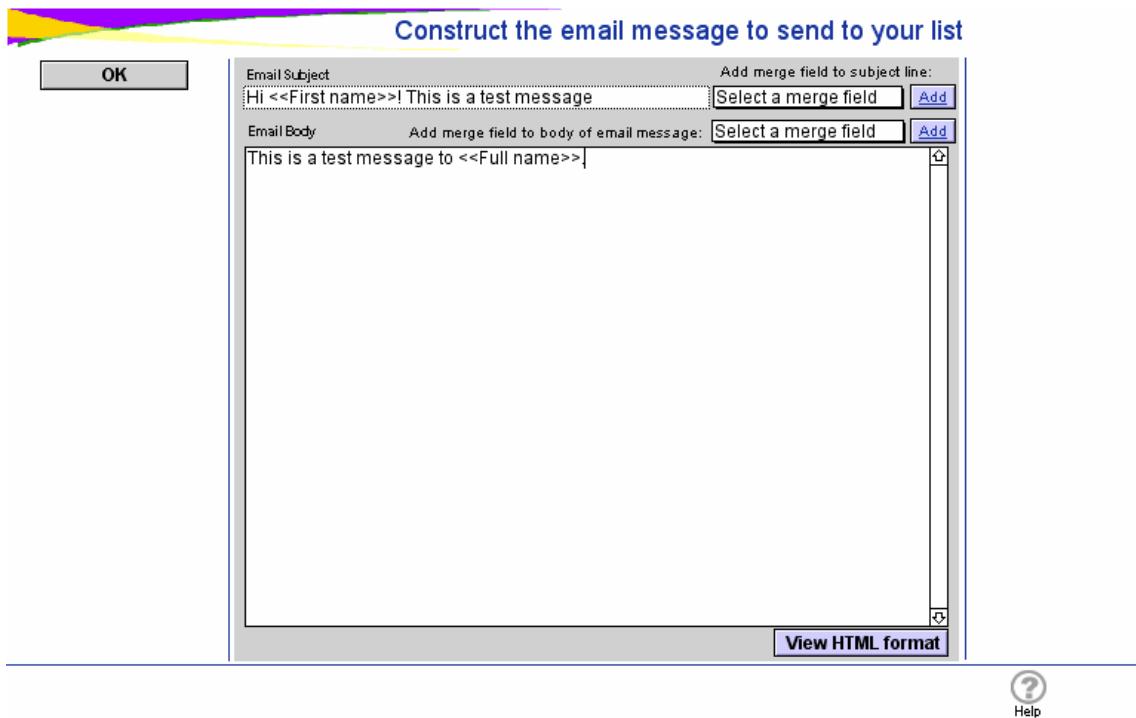
This creates an email template in CodeGenerator that will get applied to your email list found set just before you get ready to send email to your list.

- a. Go to Admin>Log Codes.
- b. Create a new “Communication” code. Fill in the buckets that work for your organization.
- c. Set the entry layouts to Email;18 to edit the entry; EmailReview;19 to view the entry.
- d. Select “Yes” in the “Make this an “email” code box
- e. In the “email management” section: Make sure that the box next to “Make this an email template” is checked
- f. Next to “Make this an email template”, click on “Setup”



- g. To personalize your email message:

- Enter a Subject
- Enter text in the “EmailBody” box
- If desired, add any fields that you wish to merge. To do this, position the cursor in the spot where you want the merge field to be, click in the “Select a merge field” box and select the field for the merge. Then, click on “Add”. You can cut and paste to move the merge fields anywhere in your message.



h. You're done!

This creates an email template in CodeGenerator that will get applied to your email list found set just before you get ready to send email to your list. Remember, you are just creating a template that you can choose (from a list of other templates). You will be able to “fine tune” the message you enter in the template just before you send your email. .

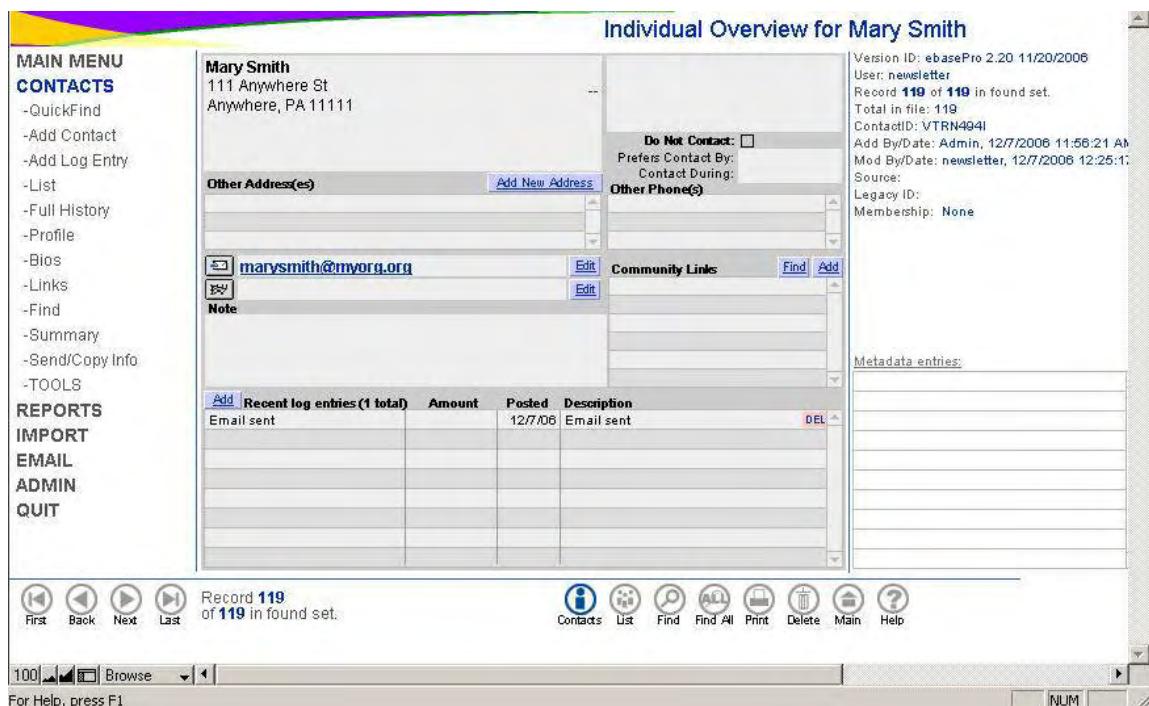
Step 2: Test your email broadcast

The email creation interface can be deceiving. It's easy to make spelling and other kinds of errors that you may not want to send to your list. Also, networks often have transient problems that can interfere with email sending, so it's a good idea to test your broadcast email on yourself, before you send it to a large number of people.

So far, you have created your broadcast message as a “recurring email template.” Now, you’ll need to set yourself up as a list of one to test your email message.

If you want to test the unsubscribe URL function, you’ll need to create a new code, just for testing purposes, and only apply it to yourself. It could be called “TestEmailMessage” or something similar, just to make it clear that it’s a code used for testing.

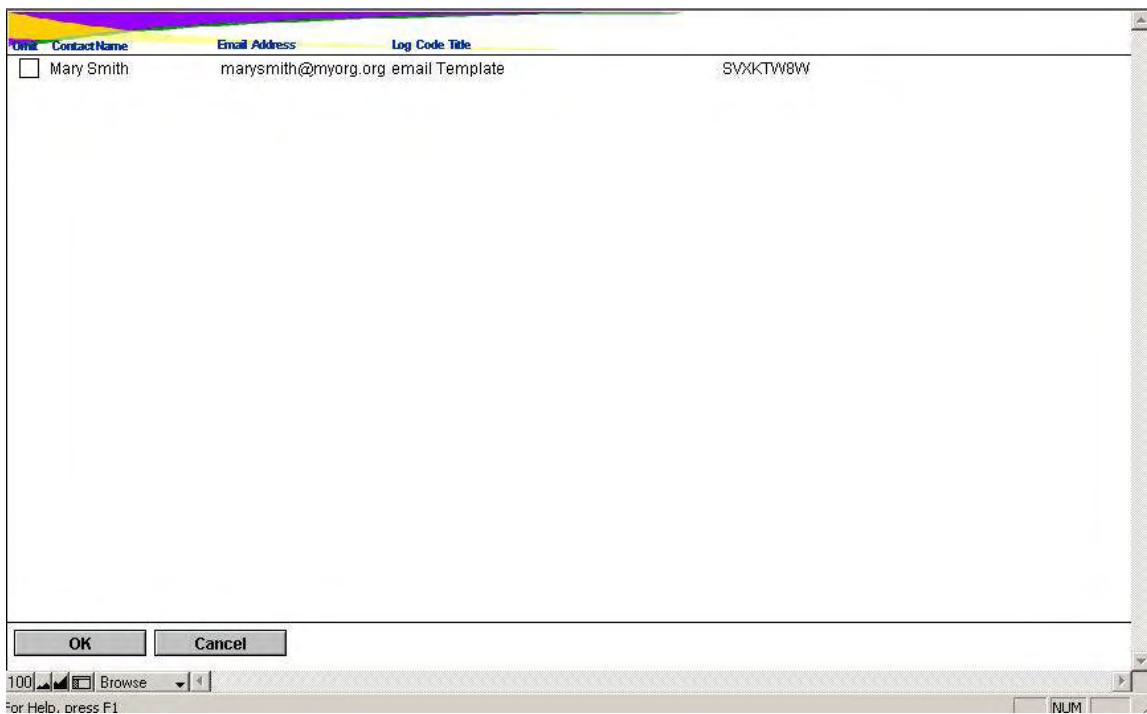
Don’t forget to check the box to make the new (test) code an email template and select “Yes” to make it an email code.



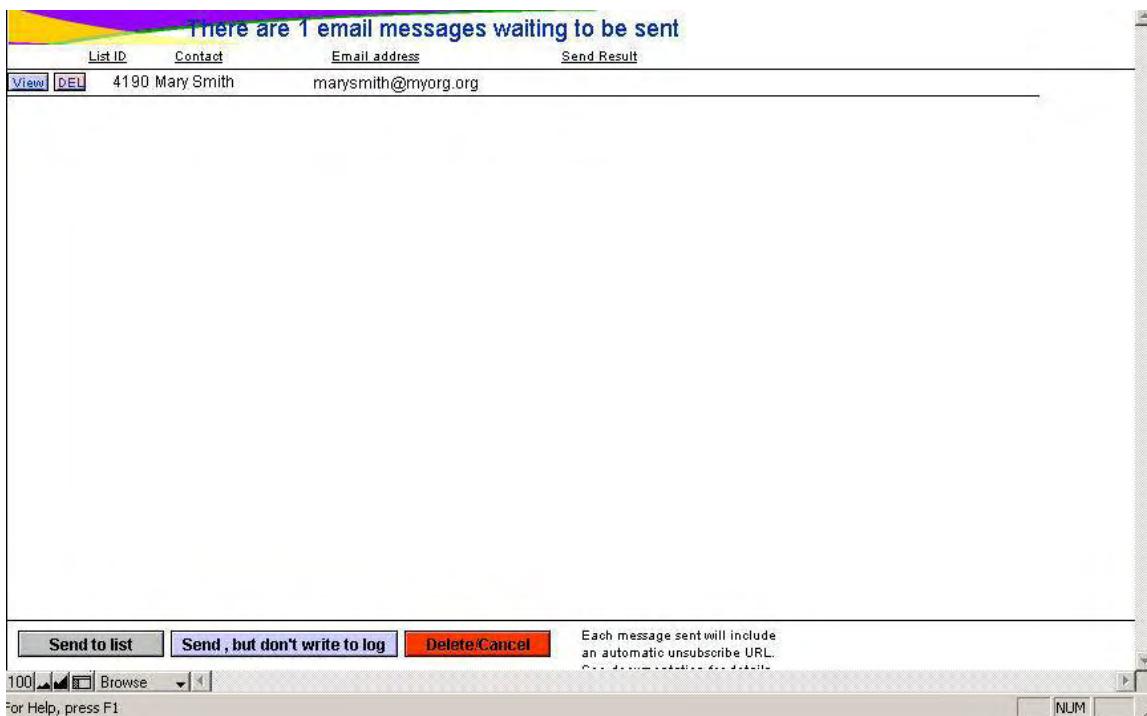
Now you're ready to test sending to an email list.

Steps:

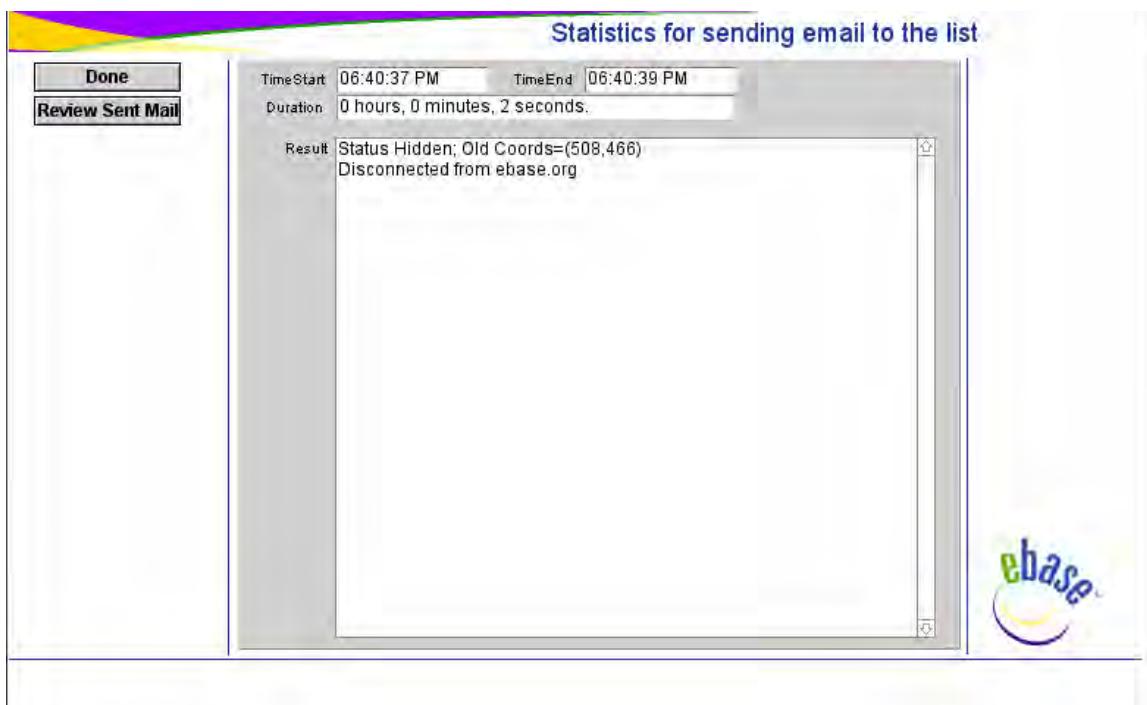
1. Click on Email>Send to List
2. A dialog will ask if you want to use an existing Entry List or use the existing Found Set.
3. Choose "Log Entry"
4. In the find screen, select the "test" code that you created. Then click "find".



5. You should see a list composed of only yourself, your email address, and a code (that will be your unsubscribe code. Actually, it's the ID of the log entry that you attached to your contact record. All an unsubscribe action does is go to your original log entry, and flag it for deletion).
6. You will also see a message that asks you to confirm that the displayed list is ok. Click "Continue". Then, if the list is correct click OK. Otherwise, click on Cancel.
7. You will then get a message that asks if you want to create a new email message or if you want to use an existing template.
8. Choose "Existing"
9. Select the recurring email message you created in the section above.
10. You will see the message you just created, and will have an opportunity to edit it if you wish.
11. When you are satisfied with the message, click OK.
12. When you are ready to send the email, click on either "Send to List" (or "Send, but don't write to log". Clicking on "Send to List" will record the email in each contact's log. If you do not want to record the email, use "Send but don't write to log." You may also cancel and start over by clicking on the Cancel button.



13. Once you have sent the email(s) in the list, you will be taken to a “Statistics” page:



14. Click on the “Review Sent Email” to see a list of emails that have been processed. If an email has been sent successfully, it will say, “Email Sent Successfully.”

15. Click on “Back to Statistics”

16. Click on Done.

You're done with your test. Check your personal email box (Outlook, Entourage, Eudora) to see if the message arrives the way you expected it to arrive.

Disatisfied with the results? Do the process over and edit the email template until you are happy.

You should expect to do this a few times before getting it right. But once you've sent a message that you're happy with, you're ready to send it to your larger list.

Send to your list of CONTACTS>

The process for sending to a larger list is the same as sending it to yourself, only this time when you define your list, you should search for the criteria that define the list you want to send to:

1. Go to Email>Send to List
2. Create a list of contacts (using the "Found Set" or "Entry List" method).
3. Select the email template you wish to send to your list. Edit the template if you want, click "OK"
4. Merge your email template with your found set. This will create a "personalized" email message for each person on your list.
5. Review the messages in the EmailList database to make sure that your message says what you want it to say, and is going to the people you want it go to.
6. Send the email (and record it in the log, or not).
7. When it's completed, review the email statistics and the list of sent email to make sure that email has made it out to everyone on your list. If it didn't, you can do a log entry find for the successful sends and then exclude (omit) those contact records from your next attempt to send to the rest of the list.

That's it. You're done!

USING EBASEPRO'S SPECIAL INCOMING EMAIL PROCESSING FEATURES

Sending email is pretty complicated. But automatically processing incoming email, once you've setup ebase to do what you want it to do, is quite simple.

Incoming ebase email processing works like this:

1. ebasePro (using the POP3it plugin) will login to a POP3 account and retrieve the email messages it finds.
2. If there are email attachments, POP3it will save the attachment to an external folder.
3. The email messages will be displayed in your EmailInBox.
4. Depending on the nature of the messages inside the EmailInBox, you have the option of reading and responding to each individual message, or you can automatically process certain kinds of email messages:

Subscribes: You can setup ebase to automatically add contact records and log entries based on "subscribe" messages. When ebasePro sees an email subject that begins with "Subscribe ", it can then match the word(s) that come after "Subscribe " to code titles with the exact same wording, and automatically create new log entries and contact records.

Unsubscribes: If you've sent email to a list created using the "Entry List" method, people can automatically unsubscribe from the list used to select their record. This will send an Unsubscribe message to the mailbox of the account that sent the original message.

Bounces: ebasePro can look at a message header, and most of the time figure out if it's a bounce message. If it's a bounce message, it can record the bounce in the originating contact's record.

PayPal email receipts: ebasePro can parse email receipts sent by the PayPal service, and automatically add the donor's name, contact information, and payment information to your copy of ebase.

Finally, you can archive all your incoming email to a shared email archive to store them for future reference. ebase automatically saves "processed" email messages in the Log file. But sometimes it's important to have another copy of your incoming mail, just in case. EmailArchive is a file used only for storing incoming email messages and can be used to quickly search through all your existing email messages for specific details. The email archive provides a backup just in case you ever need to get access to an old email message.

Typically, on "light" email days, you'll want to process your email in this order:

1. Process Subscribes
2. Process Unsubscribes
3. Process Bounces
4. Process DonateNow receipts
5. Individually respond to the remaining email

However, on days when you are processing large numbers of bounced messages, you may want to process the bounces first. That way you can have a cleaner view of the incoming email queue.

CAUTION: The ebase email processing tools were designed with the idea that each person has their own unique email address.

The ebase email processing routines use the incoming email address (sender's address) to determine which contact record gets an automatic "subscribe", "unsubscribe", "bounce" or payment entry assigned to it.

Problems may arise when two different people, with two different contact records (e.g. members of the same household) sign up for something using the same email address.

If a payment entry is being processed, both payments will get assigned to the first contact record in the database that has the email address.

The workaround for this situation is to create a Family record that has the shared email address, and work on the assumption that each individual does NOT have an individual email address (until they let you know that they do).

Process Subscribes

How it works

Processing "subscribe" messages is easy. Setting it up can be a little confusing, and it helps to know how the process works.

Simply stated, ebase looks at the subject title and checks the first word in the title. If that first word is "Subscribe " (notice the capital "S" and the space after the word "Subscribe "), then ebase will attempt to parse the sending email address.

If the email sender is already in Contacts, ebase will add a log entry to the existing contact information.

If the email address of the sender is NOT in Contacts, then ebase will create a new contact record for the sender of the email, and add a log entry that corresponds to the words following “Subscribe”

The word(s) following “Subscribe” must be **identical** to the CodeTitle of the log entry you wish to add with that subscribe message.

For Example:

If you wish to setup an automatic eNewsletter subscription, you could create a code titled: Email Newsletter.

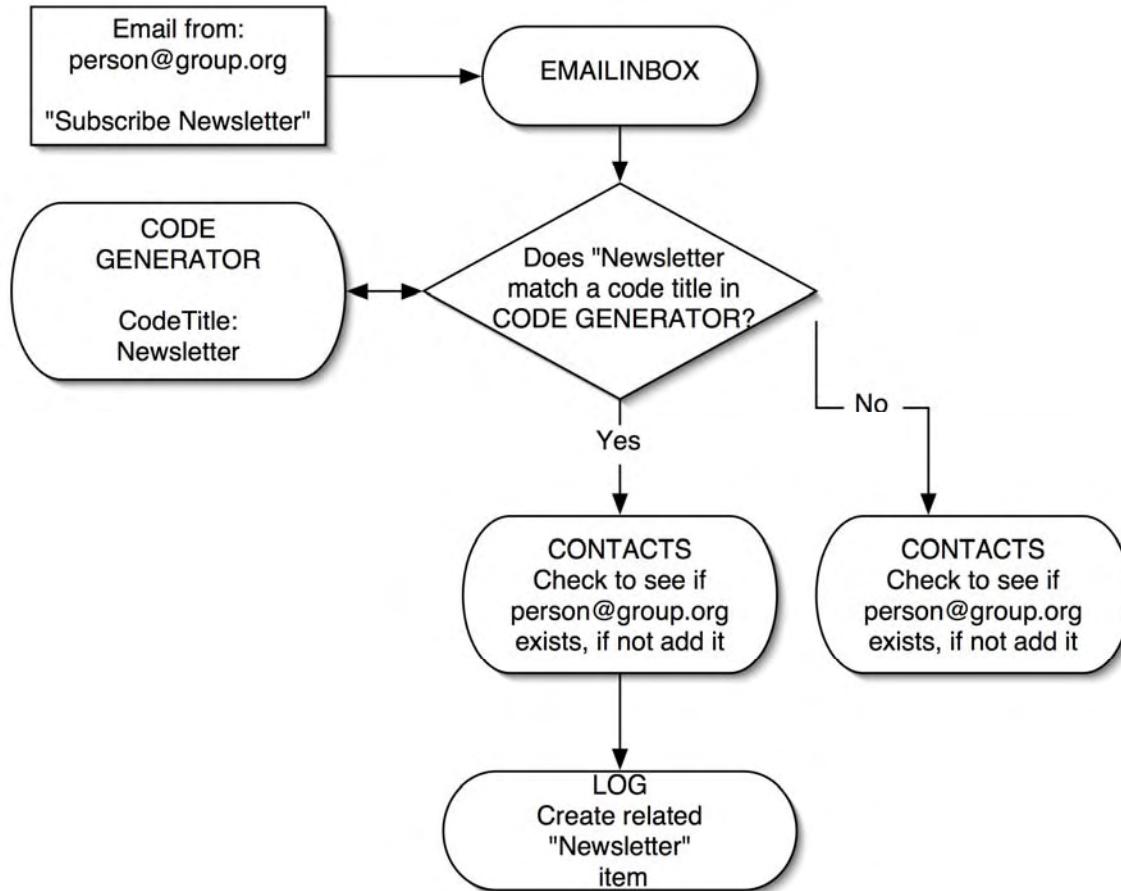
All that code would need to capture is the date added and perhaps a note about the subscription.

Then, to have someone automatically subscribe to that newsletter, they would have to send you an email with:

1. Their email address as the sender
2. “Subscribe Email Newsletter” in the subject header.
3. When ebase processes this message, it will parse Email Newsletter from the email subject header, and add a log entry to the senders Contact record.

NOTE: If the email subject is: “Subscribe newsletter”, nothing will happen, because you haven’t defined “newsletter” as the title of a code.

The ebasePro email SUBSCRIBE process



ebasePro also uses the “subscribe” process to parse the BODY of the “Subscribe” email. If the body of the email message looks like this:

- First Name: (Firstname)
- Last Name: (Lastname)
- Organization: (Organization)
- Org Title: (title)
- Address 1: (Street address)
- City: (City)
- StateProvince: (State or province)
- ZipPostalCode: (Zip or postal code)
- Country: (Country)
- Amount: (Entry Amount)
- Email From: (Email)
- Phone: (phone)
- Source: (Source)
- Note: (Log entry note)

NOTE: There is a space after the field title. This needs to be in the email body format.

Then ebase can take the information located in the body of the message, and using the “subscribe” process, create corresponding Contact and Log entries based on the data contained in the email form.

This can enable your organization to do things like:

1. Automatically add volunteers or member information directly from forms emailed to you from your website.
2. Automatically add people to a paid event from a form mailed by your website
3. Automatically subscribe people to different mailing lists

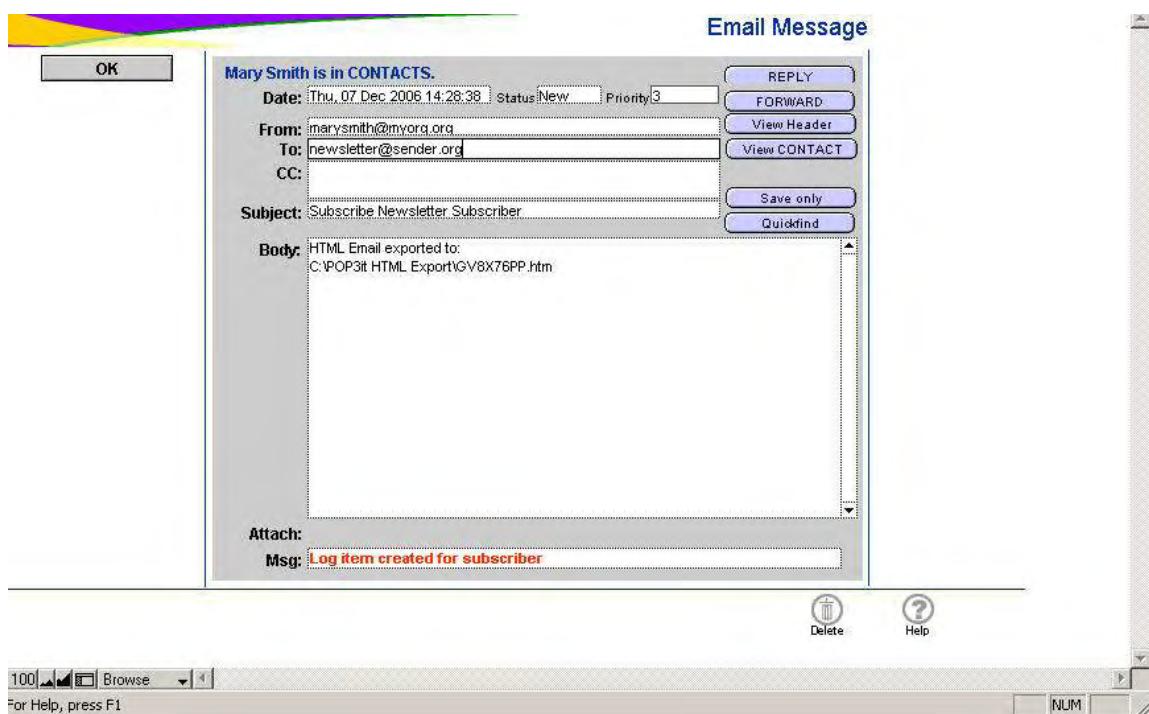
The only requirements are that you follow the rule of having the words after “Subscribe” EXACTLY match a corresponding code title, and you use the EXACT form above in the body of your email message. ebase will take care of the rest.

Processing Subscribe messages

Once you have correctly setup your codes to be able to process a subscribe message, all you need do to process them is:

1. Check your Email Inbox
2. Click on “2. Subscribes”
3. ebase will start the process of subscribing people to your list. It may take as long as 2 seconds per subscription, but it's certainly faster than doing entry by hand.

You can verify that information was correctly processed by opening an email AFTER the processing is done, then navigating to the corresponding Contact record.



Source email

Individual Overview for Mary Smith

MAIN MENU

- CONTACTS**
 - QuickFind
 - Add Contact
 - Add Log Entry
 - List
 - Full History
 - Profile
 - Bios
 - Links
 - Find
 - Summary
 - Send/Copy Info
 - TOOLS
- REPORTS**
- IMPORT**
- EMAIL**
- ADMIN**
- QUIT**

Mary Smith
111 Anywhere St
Anywhere, PA 11111

Do Not Contact:
Prefers Contact By:
Contact During:
Other Phone(s)

Community Links

Note

Recent log entries (3 total)

	Amount	Posted	Description	DEL
Newsletter Subscriber		12/7/06	wants to get newsletter	DEL
email Template		12/7/06	Generic template used to send thank	DEL
Email sent		12/7/06	Email sent	DEL

Record 119 of 119 in found set.

First Back Next Last

Contacts List Find Find All Print Delete Main Help

100 Browse for Help, press F1 NUM

Corresponding Contact and Payment record

After you are done processing your subscribes, it's a good idea to archive the subscribe found set before you move on to the next email step. This keeps your Inbox clean, holding only those messages that have not yet been processed.

To archive your current found set of emails, go to the email menu and click on: Archive FoundSet. ebasePro will import your current email found set into EmailArchive.

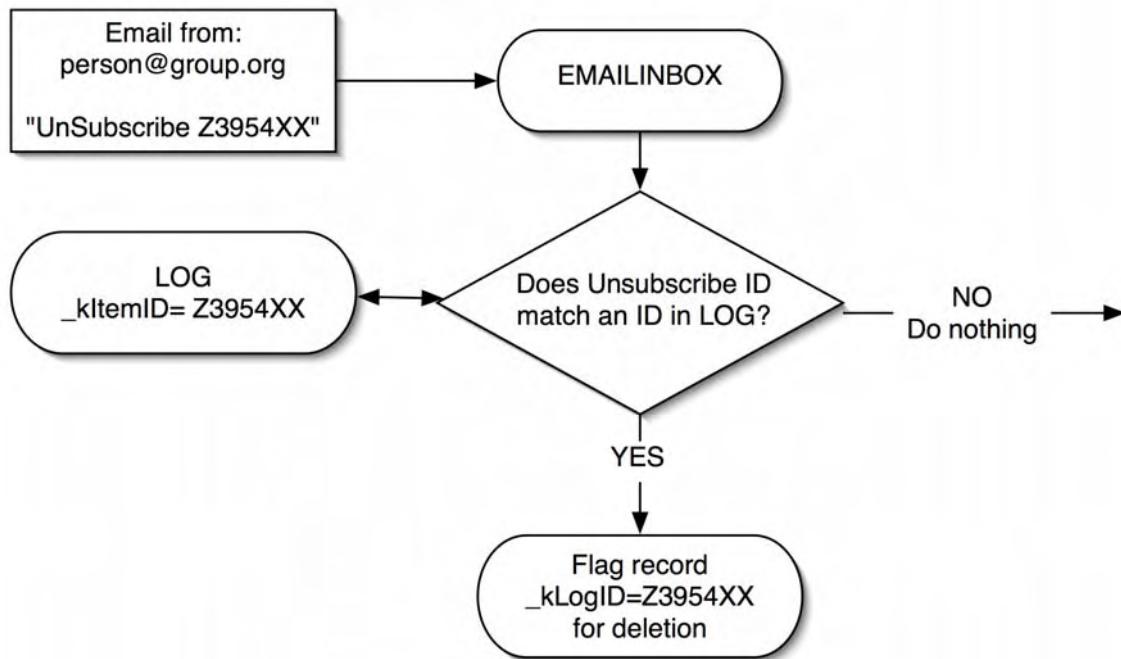
Process Unsubscribes

Processing unsubscribes is substantially easier than processing subscribes. The tricky part was creating your outgoing list in the first place, using the "Entry List" method.

When you create a list using the "Entry List" method, ebase records the record ID (_kEntryID) of the entry attached to each Contact on the list in the bottom of the email message as an unsubscribe URL (mailto:yourebaseaccount@yourgroup.org?Subject=Unsubscribe_kEntryID)

When ebase receives an email with the subject title: "Unsubscribe [_kentryID]", it will search the Log for entries matching "_kEntryID" and will flag those entries for deletion.

The ebasePro email UNSUBSCRIBE process



To process your incoming unsubscribes, simply click on “Unsubscribes.” ebase will do the rest. After you are done processing your unsubscribes, it’s a good idea to archive the subscribe found set before you move on to the next email step. This keeps your Inbox clean, holding only those messages that have not yet been processed.

To archive your current found set of emails, click on the Archive FoundSet. ebasePro will import your current email found set into the EmailArchive file.

Process Bounces

ebasePro can recognize most, but not all, email bounce messages. Although there are internet standards for recording email bounces, various mail servers may or may not follow those guidelines.

If you send out a large emailing to your list, there's a good chance you'll get a 10% to 30% bounce rate (meaning, that if you mail to 100 people, you'll get 10-30 bounces). This is pretty standard behavior for mailing lists that are used on a monthly basis.

ebase can help you process the bounces you receive by:

1. Identifying an email as an Autoreply (and deleting it)
2. Identifying an email as a bounce
3. Parsing the email address of the sender from the bounce message
4. Adding a “bounced email” entry to the Contact record of the person whose email “bounced.”

To process email bounces, you need to check your Email InBox, then click on “4. Bounce Processing”

ebase will identify possible bounces in your InBox, then go through and mark the source Contact records with a Bounced Email entry. It takes 1-2 seconds per bounce.

That's it. After you are done processing your bounces, it's a good idea to archive the subscribe found set before you move on to the next email step. This keeps your Inbox clean, holding only those messages that have not yet been processed.

To archive your current found set of emails, click on the Archive FoundSet. ebasePro will import your current email found set into the EmailArchive

Bounce reporting

Many email servers can distinguish between “soft” and “hard” bounces. “Soft” bounces are caused by transient errors (DNS servers offline, a network down or unreachable). “Hard” bounces are caused by bad email addresses; user not known; DNS record does not exist.

Unfortunately, ebase can't distinguish between soft and hard bounces, but it has a process that lets you create a found set of people in Contacts.200 with more than a certain number of bounces. You can be pretty sure that if you mail someone 5 times, and you get 5 bounces, that their email address isn't getting to them, (compared to say, mailing someone 5 times and only getting one bounce).

The “Email Bounce” report is a specialized report that calculates the current number of email bounces for each Contact in your database, then searches the database for Contacts matching a number (specified by you) of email bounces. See the Reports section for more details on this report.

Process paypal receipts

ebasePro 2.1 has the ability to parse a PayPal email receipt, and turn it into a new Contact record and a related payment entry. When you click on the Email>PayPal entry, ebase looks through your email messages for new email from PayPal then takes any found email receipts, turns them into standard ebase Subscribe forms, then runs the “Subscribe” process.

There is one trick to making this work smoothly: Your PayPal account name must EXACTLY match a payment code title in Code Generator.

For example, if you want to process “Donations to My Group,” your PayPal account must be “Donations to My Group” and your corresponding payment code must have the code title “Donations to My Group.” Once those match, ebase will process PayPal receipts just like any other subscription.

Please Note: This process relies on having a known structure in the confirmation email from PayPal. If that email structure changes, it may break the ability to process these emails in ebase and the underlying scripts in ebase may need to be modified to return this functionality.

The screenshot shows the 'Email InBox' screen. On the left is a vertical menu bar with the following items:

- MAIN MENU
- CONTACTS
- REPORTS
- EMAIL
 - Setup
 - Troubleshoot
- List Functions
 - Send to List
 - Email Quickfind
- Email Processing
 - 1. Check InBox
 - 2. Subscribes
 - 3. Unsubscribes
 - 4. Bounce processing
 - DonateNow!
 - Archive FoundSet
 - Logout
- IMPORT
- ADMIN

The main area displays a single message in the inbox:

Subject	From	Date	Status
online donation via Groundspring.org	Donations at Groundspring.org has just received a new donation via Groundspring.org.	9/25/2003	New

On the right side of the inbox, there is a sidebar with the following information:

- User: admin
- POPHost: ebase.org
- Authentication: Off
- CountofEmail: 2

At the bottom of the inbox are two small icons: 'Main' and 'Help'.

A PayPal email message received

The screenshot shows the 'Email Message' screen. At the top left is a button labeled 'OK'. The main area contains the following fields and information:

- Date: 9/25/2003 Status: New Priority: [empty]
- From: Donations at Groundspring.org (via Groundspring.org) View Header
- To: donations@ebase.org
- CC: [empty] Add CONTACT Save only Quickfind
- Subject: online donation via Groundspring.org
- Body: Groundspring.org has just received a new donation via Groundspring.org.
Your email address, andy@groundspring.org, has been designated to receive this information each time an online donation is made. To change this recipient address or to discontinue these emails altogether, please log into your Groundspring.org account and modify your account settings accordingly.
Please respond to this email or contact us at 415.561.7807 if you have any questions.
Donation To: Payment
Donation Amount: \$35.00
First Name: Andy
Last Name: kalin
Address 1:
Address 2: 123 Testing Address Way
City: Citrusville
- Attach: [empty]
- Msg: [empty]

At the bottom right are two small icons: 'Delete' and 'Help'.

The receipt format

Email Message

OK	<p>Andy Kalin is in CONTACTS.</p> <p>Date: 9/25/2003 Status: Processed Priority: <input type="text"/></p> <p>From: andy@groundspring.org</p> <p>To: <input type="text"/></p> <p>CC: <input type="text"/></p> <p>Subject: Subscribe Payment</p> <p>Body:</p> <pre>First Name: Andy Last Name: Kalin Organization: Org Title: Address 1: 123 Testing Address Way City: Cityville StateProvince: CA ZipPostalCode: 12345 Country: US Amount: 35 Email From: andy@groundspring.org Phone: 4155551212 123 Source: donations@groundspring.org Note: Contents of Original Receipt: Groundspring.org has just received a new donation via Groundspring.org.</pre> <p>Attach:</p> <p>Msg: Contact record added and Andy Kalin was subscribed to Payment</p>
-----------	---

Delete
Help

The receipt parsed into Subscribe format

It's a good idea to review your payment records after you've processed the receipts. This will let you start memberships and send thank you emails immediately after you receive the payment information.

View Mbr payment, associate for Andy Kalin

OK	<p>Mbr payment, associate</p> <p>PAYMENT INFORMATION</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Amount</td> <td style="width: 15%;">DatePosted</td> <td style="width: 15%;">InvoiceID</td> </tr> <tr> <td>\$35.00</td> <td>3/23/2004</td> <td><input type="text"/></td> </tr> </table> <p>Description of Log Entry</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">PaymentMethod</td> <td style="width: 15%;">Check #</td> <td style="width: 15%;">Acct Entity</td> <td style="width: 15%;">Acct Code</td> </tr> <tr> <td>Online</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Pay Authorization Code:</td> <td colspan="3">Authorized By: <input type="text"/></td> </tr> </table> <p>NonDeductAmt DeductAmt Credit in FY FY</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="text"/></td> <td>\$35.00</td> <td><input type="text"/></td> <td>2006</td> </tr> </table> <p>From Solicitation <input type="text"/> Donations@groundspring.org</p> <p>Unique Code "Soft" Credit To: <input type="text"/></p> <p>Solicitor: <input type="text"/></p> <p>NOTE</p> <pre>Contents of original receipt Groundspring.org has just received a new donation via Groundspring.org your email address, andy@groundspring.org has been designated to receive</pre> <p>DUES / SCHEDULED PAYMENT</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Membership type</td> <td style="width: 15%;">DateStart</td> <td style="width: 15%;">Period/Unit</td> <td style="width: 15%;">GracePeriod</td> </tr> <tr> <td><input type="text"/></td> <td>12/7/2006</td> <td>365</td> <td>DY <input type="text"/></td> </tr> </table> <p>Expire Date Member Status</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>12/2007</td> <td><input type="text"/> CURRENT</td> </tr> </table> <p>Grace Expire 1/6/2008</p> <p>Thank you sent? Required? No No <input type="text"/> Send Thank You</p> <p>TO DO</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">AssignedTo</td> <td style="width: 15%;">Contact by</td> <td style="width: 15%;">Problem?</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td>No</td> </tr> <tr> <td colspan="3">Date Contacted <input type="text"/></td> </tr> </table> <p style="text-align: right;">Admin Edit</p>	Amount	DatePosted	InvoiceID	\$35.00	3/23/2004	<input type="text"/>	PaymentMethod	Check #	Acct Entity	Acct Code	Online	<input type="text"/>	<input type="text"/>	<input type="text"/>	Pay Authorization Code:	Authorized By: <input type="text"/>			<input type="text"/>	\$35.00	<input type="text"/>	2006	Membership type	DateStart	Period/Unit	GracePeriod	<input type="text"/>	12/7/2006	365	DY <input type="text"/>	12/2007	<input type="text"/> CURRENT	AssignedTo	Contact by	Problem?	<input type="text"/>	<input type="text"/>	No	Date Contacted <input type="text"/>		
Amount	DatePosted	InvoiceID																																								
\$35.00	3/23/2004	<input type="text"/>																																								
PaymentMethod	Check #	Acct Entity	Acct Code																																							
Online	<input type="text"/>	<input type="text"/>	<input type="text"/>																																							
Pay Authorization Code:	Authorized By: <input type="text"/>																																									
<input type="text"/>	\$35.00	<input type="text"/>	2006																																							
Membership type	DateStart	Period/Unit	GracePeriod																																							
<input type="text"/>	12/7/2006	365	DY <input type="text"/>																																							
12/2007	<input type="text"/> CURRENT																																									
AssignedTo	Contact by	Problem?																																								
<input type="text"/>	<input type="text"/>	No																																								
Date Contacted <input type="text"/>																																										

Find
Print
Delete
Main
Help

100
 Browse
 For Help, press F1

NUM

Payment record created from a PayPal receipt

Notice that the Dues/Scheduled payment information is blank, and that a Thank You has not been sent. This will need to be done manually for each payment received.

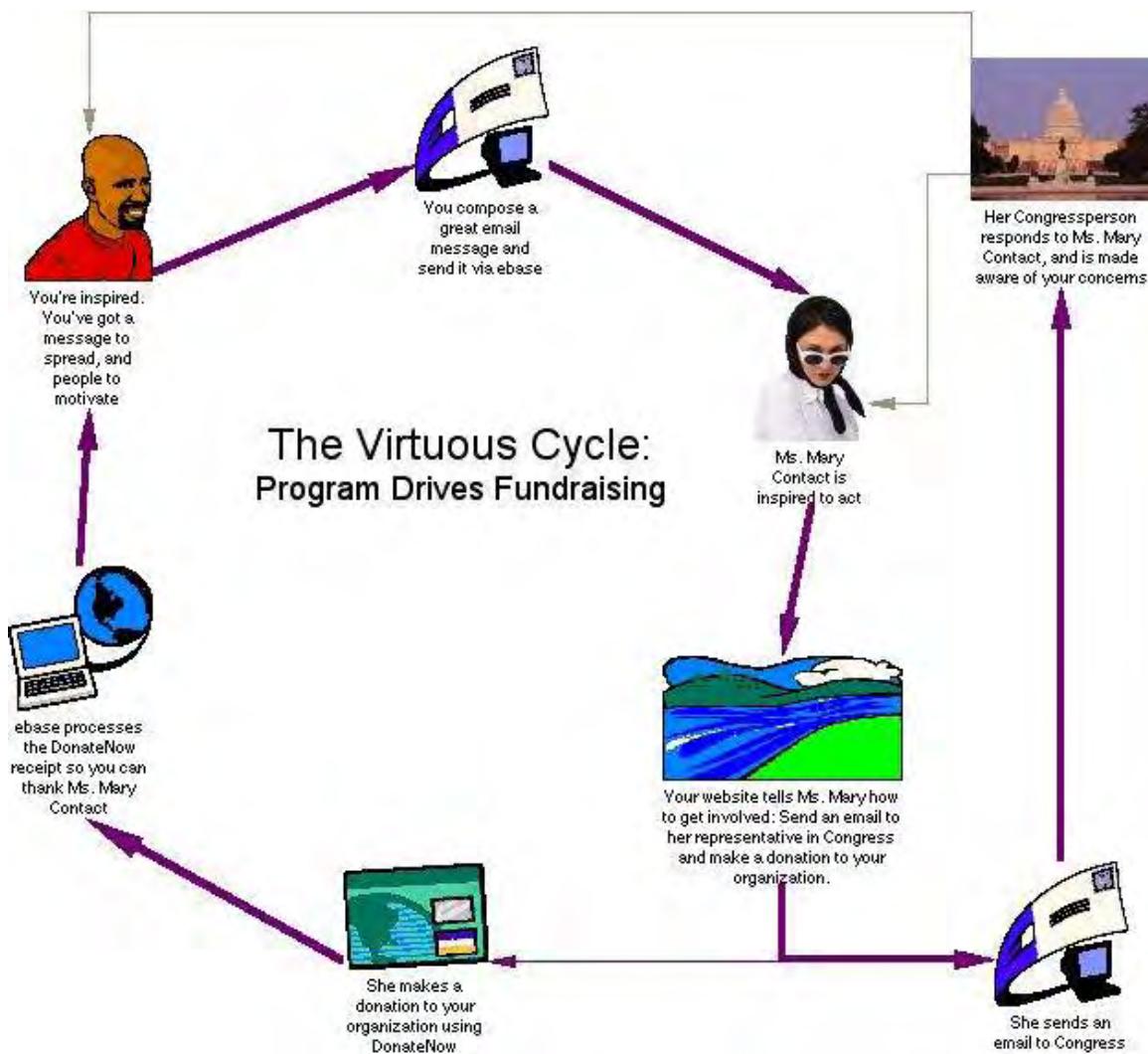
After you are done processing your PayPal receipts, it's a good idea to archive the subscribe found set before you move on to the next email step. This keeps your Inbox clean, holding only those messages that have not yet been processed.

To archive your current found set of emails, click on the Archive FoundSet. ebasePro will import your current email found set into the EmailArchive file.

THE GOAL: USE EBASEPRO TO START A “VIRTUOUS CYCLE” WITH YOUR CONSTITUENCY.

The real power of ebasePro's email processing comes from integrating your email campaigns with your organization's website to create a “virtuous cycle” of request-response-new request that will allow your organization to strengthen its relationships with its constituency and sustain itself.

A typical “virtuous cycle” looks something like this:



The virtuous cycle links email outreach, with information and appeals on your website, with electronic activism and online donations to support your organization. You can use the virtuous cycle to initiate and strengthen your relationship with your constituency and provide financial support for your efforts.

ebase can be used to create and enhance this virtuous cycle:

1. Plan campaigns that start by initiating direct contact with your constituency. Start gathering email addresses for your members.
2. Send an email alert asking your constituents to go to your website for more information about a particular issue.
3. On your website, setup a specific page (or section) for a particular campaign. Typical advocacy sites use a simple method to engage constituents and acquire new names:
 - Send a letter/fax/email (or do some action) to make things better. (Typically done using HTML forms and the ability to send email from your website). If they send a letter, have your website CC: your ebase email account and have ebase record the letter as a Log entry related to the Contact.
 - Make a donation.

- “Tell a friend” about the campaign. Have them fill out a form to send information about the campaign to their friends. Use HTML forms and ebase’s Subscribe function to automatically capture the names of their friends in your database.
4. Process the results of their actions using ebase. If they write a letter, setup a separate entry code to record the letter they sent.
 5. If they invite a friend, setup another entry to Subscribe their friend to a prospective member list.
 6. Thank your Contact for taking action, then ask them to do it again!

Chapter 11 Reports	2
Reports: Overview	2
A note on printing	2
A note on exports	3
Before you run a report	3
Technical overview	3
Here's how the report process generally works	4
For developers	4
Note on Report description format	5
Generic	5
Avery 5160 labels	5
Avery 5160 labels+email	5
Avery 5160 labels ExpDate	6
Avery 5160 labels Streamlined.....	6
Basic Info.....	6
Basic Info+ 3-col.....	7
Basic Info+, Export	8
Email list export	9
Phone Book.....	10
Phone List.....	10
Single Contact Log Entry	11
Contact Reports	13
All Addresses for Contacts	13
Contact History	14
Contact Link report	16
Contacts Export.....	17
Contacts Listed by Log Entry	18
Contact Reports Export:.....	19
Mail House Address Export.....	20
Name and Home Address Export	20
Log ENTRIES REPORTS.....	21
Amount Report (Detail).....	21
Amount Report (Summary)	22
Basic Log Entry Report	22
Quantity Report	24
Membership Reports	25
Member export	25
Member renewal export.....	26
Members Current	27
FUNDRAISING Reports	29
Activity Response	29
Complete Donor History	30
Deposit report	31
Donor & Solicitor report	33
LYBUNT List.....	34
Member Giving – YTD	35
Pledge Report.....	36
Response Analysis.....	37
Soft Credit Report.....	40
Solicitation Deposit report	40
Solicitor report	41
SYBUNT List	42
LEGACY REPORTS	43
ContactsAll.csv.....	43
ContactsAll.htm	45
LogAll.csv	46

LogAll.htm.....	49
Special Use Reports.....	51
Codes Report	51
Email Bounce Report	53
Export for Enhanced Data- LCV.....	54
Update Seasonal Address.....	55
Omit Location Dups.....	55

Chapter 11 Reports

REPORTS: OVERVIEW

The reports module contains a list of reports and export formats broken into subject categories like:

- Generic
- Contact
- Log Entries
- Membership
- Fundraising
- Legacy
- Special Use
- **Update Seasonal Addr[esses]*
- **Omit Location Dups*

To run a report, you need to locate the report from one of the menus, then click on the report URL—the name in the list.

The two starred “reports” above will not take you to a list of reports. Rather they are functions and will offer to take an action. See description below for the details.

Depending on the nature of the report, it may either use the current found set in Contacts, or, it may ask you to do a find and enter information about the report you want generated.

This section will provide a brief overview of the structure of the ebase reports module, then review each category of reports and each of the reports in that category.

NOTE: Most of the reports included with ebasePro were submitted through user requests! If you don't see reports that you need in ebasePro, we encourage you to submit (detailed) specifications in the ebase website. The ebase Technical Advisory Committee periodically reviews these enhancement requests and votes on which ones to implement in the next version of ebase. The more detailed and well-thought-through your report request, the more likely it will be that it is implemented in the next version of ebasePro.

A note on printing

Many of these reports were designed to print on as broad a variety of printers as possible. Unfortunately we have learned that in practice, “default” settings do not work on every printer. In order for some of these reports to print correctly on your specific printers, you may need to adjust the source layouts for the reports.

To adjust the layouts, you'll need a copy of FileMaker Pro and "developer" level access to open the relevant files and adjust the layouts so they work with your particular printer.

Another option (that works on some printers) is to increase or reduce page margins in your "Page Setup" settings or to reduce or increase the size of the final printed text or labeled text (also in Page Setup).

Most of the reports in ebase give you the option of setting up your printer before the report is printed, in case you need to make adjustments depending on your printing type or paper size.

A note on exports

Most of the exported data files are exported, by default, as .mer files (which are comma-separated fields with field names as the first row.) Most exports ask you to choose where you want the files to go. You will have to remember where you put the saved exported files to be able to later use them in merge documents.

However, you can override most of the default formats by selecting the export file type using the standard FileMaker Pro export dialog. To choose the file format you want, click on the drop-down list of file formats located at the bottom of the export screen.

Merge template samples are available in the ebase community website

In previous versions of ebasePro, we included sample merge templates to use as alternative report formats. For version 2.11, we felt that the templates were a bit of overkill due to improvements in Microsoft Word's merge functions; however, they are still available in the ebase community software library for download.

Before you run a report

Various reports use data from different parts of ebase. Sometimes, reports use data that may be out of sync with other related data. Before you run reports, you should consider performing the following maintenance steps. Often, they are not needed. But if you want to be absolutely sure that your reports reflect what is in your data, or if you have not run them in some time, you should consider running the following maintenance scripts, (located in Admin>Maintenance Scripts).

Fix Report Helper File Ids – This script rebuilds the fields in ContactReports (especially summary calculation fields) and LogReports. This typically does not take a long time.

Update Seasonal Addresses – This script updates the current Primary Contact Location records for all of your Contacts based on data you may have entered in the "Valid Dates" fields. Use only if you use ebase seasonal addressing functions.

Update Log and Update Fast Find Fields – This script rebuilds basic log entry information. Depending on how many log entries you have in your collection, this may take a while to run. You should use this script if you run a report on any kind of log entry and it produces an obviously wrong answer.

TECHNICAL OVERVIEW

The Reports module is made up of three databases:

- **Reports:** Holds report records that detail the nature of the report and special script instructions used to run the report. These records can be reviewed by Admin users in ADMIN>Setup ebase>Reports

- **ContactReports:** Maintains a “mirror” of _kContactID’s from Contacts, and is used to calculate summary financial data for each Contact.
- **LogReports:** Maintains a “mirror” of _kLogID’s from Contacts, and also stores any _kContactIDs associated with the _kLogID’s.

Here's how the report process generally works

When you click on a report record, ebase looks to a script that interprets the name of the report. Based on that name, the “switchboard” script runs a set of subroutines that help determine:

- Which “find” to use
- Which output format (printing, on-screen, export) to use
- Which “sort” to use
- Whether the report should send its results to an external (customized) module.

The biggest distinction between the various report types lies in where their “found set” is located.

“Generic” reports use the current found set in Contacts. Many of the other reports use custom found sets created as the report is run. Sometimes, one found set “informs” the ending found set. For example: If you want to print a complete history of transactions of your board members, you would use the Complete Donor History report.

The Donor & Solicitor report starts in Log (to do the initial find), then locates corresponding Contact records in ContactReports, and finishes up printing the report in ContactReports (because that’s where summary data on Contacts is calculated).

ebasePro reports also include exported data. You can export just about every piece of data in ebase for use in word processing documents, spreadsheets and other databases.

To view how each report is set up to interact with the various report subroutines, you can look at each Report’s record by going to ADMIN>Setup ebase>Reports, then click on the title of the report from which you want to review the record.

If you simply want to see what fields each report includes and what it does, click on the “Details” URL next to the report title in the Report module portal.

For developers

“Following the bouncing ball” in reports can be somewhat tricky, but with a little effort and a copy of FileMaker Pro, you’ll be able to create custom reports relatively quickly. You’ll need to understand how FileMaker scripts work, and how FileMaker passes data from one related file to another. Once you know these common techniques, all it takes to create custom reports is a little patience.

If you are planning on creating custom reports, we strongly recommend that you join the ebase developer community and ask your questions in their forums. You’ll find a wealth of experience there, and you might even find that a developer has already created a report very similar to what you need.

Note on Report description format

The report descriptions below are categorized by Report category, and include the following information:

- *Description:* What the report is intended to do or display.
- *Report format:* What kind of report is it - A single form? A list? A summary? Labels?
- *Report runs in:* Some “reports” actually export data, others are meant to be run inside ebase.
- **Merge file (.mer = CSV w/headers)** means comma-separated values, field headers are the first row of data.

GENERIC

All “generic” reports use data from the Contacts “found set.” In other words, you need to first create your found set by doing a Contacts find, then choose the report format you want. You can also get to this list of reports from the CONTACTS>List view in Contacts by clicking on the REPORTS icon at the bottom of the Contacts List screen.

NOTE: Many of the layout formats (esp. the label formats) have been set up to work with a “generic” printer setting. Many printers will not honor these settings and the layouts may have to be adjusted to correspond with your particular printer. To adjust the layouts, you’ll need a copy of FileMaker Pro and “developer” level access to open the relevant files and adjust the layouts so they work with your particular printer.

Another option is sometimes to increase or reduce page margins in your “Page Setup” settings or to reduce or increase the size of the final printed label (also in Page Setup).

Avery 5160 labels

Description: 3-column mailing label using single, calculated field. Print only. Data includes: PrimaryOrganizationalContact, ContactName, AddressLine1, AddressLine2, City, State, Zip, Country

Report format: Avery 5160 labels

Report runs in: ebase

Default report header:

Report field list: CON>_ccContactInfoLabelStandard

Avery 5160 labels+email

Description: 3-column mailing label using single, calculated field. Print only. Data includes: PrimaryOrganizationalContact, ContactName, AddressLine1, AddressLine2, City, State, Zip, Country, Email

Report format: Avery 5160 labels

Report runs in: ebase

Default report header:

Report field list:

- CON>_ccContactInfoLabelStandard
- CON>PCLEmail

Avery 5160 labels ExpDate

Description: 3-column mailing label using single, calculated field. Print only. Data includes: Member Expire Date, PrimaryOrganizationalContact, ContactName, AddressLine1, AddressLine2, City, State, Zip, Country

Report format: Avery 5160 labels

Report runs in: ebase

Default report header:

Report field list:

- Summery> CON>_ccContactInfoLabelStandard

Avery 5160 labels Streamlined

Description: 3-column mailing labels. Name and full (primary) address. No options salutation prefs, adding Log entries or omitting location dups. Sort by Name

Data includes: PrimaryOrganizationalContact, ContactName, Title and/or Department, AddressLine1, AddressLine2, City, State, Zip, Country

Report format: Avery 5160 labels

Report runs in: ebase

Default report header:

Report field list:

- Summery> CON>_ccContactInfoLabelStandard

Basic Info

Description: Basic contact information on a single-line. Used as default list format. Single line listing that displays ContactName, Org, AddressLine1, City, State, Zip, County, Country, Email.

Report format: Data on one line

Report runs in: ebase

Default report header:

Report field list:

- ContactName
- _ccLastPaymentCalc
- _ccContactInfoLine

Basic Contact Info					
Omit	NAME (A-Z) (Z-A)	ORGANIZATION (A-Z) (Z-A)	CITY, STATE (A-Z) (Z-A)	EMAIL (A-Z) (Z-A)	PCL PHONE
<input type="checkbox"/>	Akbar Household		Sacramento, CA 94203	cakbar@xyz.net	(111) 5334567
<input type="checkbox"/>	Gary Artz		Sacramento, CA 94203	gartz@xyz.net	(222) 8434567
<input type="checkbox"/>	Marina Balazs		Minot, ND 58702	mbalazs@xyz.net	(222) 9434567
<input type="checkbox"/>	Fernanda Barbieri		Savannah, GA 31409	fbarbieri@xyz.net	(333) 6634567
<input type="checkbox"/>	Rick Chandler		Columbia, MO 65202	rchanlder@xyz.net	(222) 1534567
<input type="checkbox"/>	Aaron Chumrau		Springfield, IL 62746	aaron@xyz.com	(111) 6234567
<input type="checkbox"/>	Alexandra Danicich		Walla Walla, WA 99362	adanicich@xyz.net	(333) 7634567
<input type="checkbox"/>	Harold de Blanc		Las Cruces, NM 88005	hde blanc@xyz.net	(111) 8334567
<input type="checkbox"/>	Feldman/Kennett		Anchorage, AK 99501	bfeldman@xyz.net	(111) 7234567
<input type="checkbox"/>	Paul Flannery		Kansas City, MO 64123	pflannery@xyz.net	(222) 2534567
<input type="checkbox"/>	Frank Gonzalez		Binghamton, NY 13905	fgonzalez@xyz.net	(333) 3634567
<input type="checkbox"/>	Nora Goode		Helena, MT 59801	ngoode@xyz.net	(222) 3534567
<input type="checkbox"/>	Ludwig Graf		Washington, DC 20010	lgra@xyz.net	(111) 9334567
<input type="checkbox"/>	Randolph Holmes		Atlanta, GA 30328	rholmes@xyz.net	(222) 1434567
<input type="checkbox"/>	Homer Household		Kansas City, MO 64123	ahomer@xyz.net	(111) 8234567
<input type="checkbox"/>	Einer Horvath		Athens, OH 45701	ehorvath@xyz.net	(111) 1234567
<input type="checkbox"/>	Odetta Johnson		Athens, OH 45701	ojohnson@xyz.net	(333) 4634567
<input type="checkbox"/>	Ornetta Johnson		Shreveport, LA 71153	ojohnson@xyz.net	(222) 4534567
<input type="checkbox"/>	Kass Household		Columbia, MO 65202	bkass@xyz.net	(111) 9234567
<input type="checkbox"/>	August Klein		Binghamton, NY 13905	aklein@xyz.net	(333) 8634567

Basic Info+ 3-col

Description: Basic contact information displayed in a 3 column layout, plus contact metadata. This is a print-only report. The Basic Info gives you some sort order choices before the report is run: Last name, first ascending; Last, firstname descending; State, City, Postal Code ascending, and Postal Dode descending.

Report format: 3-column print out

Report runs in: ebase

Report field list:

- `_kContactID`
- Contact Metadata
- ContactName
- Database Source
- Greeting Source
- PCLAddress
- PCLEmail
- PCLOrg
- PCLPhone(s)
- PCLTitle

Contact Info List: Basic Info+ 3-COL		
Total displayed: 52		
Akbar Household 123 Helena Street Sacramento, CA 94203 Email: cakbar@xyz.net Phone: (111) 5334567 Mobile: Fax:	Gary Artz 335 Woolf Circle Sacramento, CA 94203 Email: gartz@xyz.net Phone: (222) 8434567 Mobile: Fax:	Marina Balazs 336 Harrison Street Minot, ND 58702 Email: mbalazs@xyz.net Phone: (222) 9434567 Mobile: Fax:
Membership: CURRENT Expire Date: 11/15/2006 Last Member Payment \$: 732234 Last Payment Date: 10/15/2005 Last Payment Amt \$: 100	Membership: GRACE CURRENT Expire Date: 8/31/2006 Last Member Payment \$: 732189 Last Payment Date: 8/31/2005 Last Payment Amt \$: 50	Membership: GRACE CURRENT Expire Date: 8/31/2006 Last Member Payment \$: 732189 Last Payment Date: 8/31/2005 Last Payment Amt \$: 25
Fernando Barbieri 401 Apollo Street Savannah, GA 31409 Email: fbarbieri@xyz.net Phone: (333) 6634567 Mobile: Fax:	Rick Chandler 337 Sandpiper Way Columbia, MO 65202 Email: rchandler@xyz.net Phone: (222) 1534567 Mobile: Fax:	Aaron Chumrau 116 Cardinal Street Springfield, IL 62746 Email: aaron@xyz.com Phone: (111) 6234567 Mobile: Fax:
Membership: GRACE CURRENT Expire Date: 8/31/2006 Last Member Payment \$: 732189 Last Payment Date: 8/31/2005 Last Payment Amt \$: 25	Membership: GRACE CURRENT Expire Date: 8/31/2006 Last Member Payment \$: 732189 Last Payment Date: 8/31/2005 Last Payment Amt \$: 25	Membership: None Last Payment Date: 1/2/2006 Last Payment Amt \$: 150
Alexandra Danicich 402 Coleridge Avenue Walla Walla, WA 99362 Email: adanicich@xyz.net Phone: (333) 7634567 Mobile: Fax:	Harold de Blanc 126 Partridge Avenue Las Cruces, NM 88005 Email: hde blanc@xyz.net Phone: (111) 8334567 Mobile: Fax:	Feldman/Kennett Household 117 Eagle Circle Anchorage, AK 99501 Email: bfeldman@xyz.net Phone: (111) 7234567 Mobile: Fax:

Basic Info+, Export

Description: Basic contact information plus contact metadata, exported to a .mer file. Can be used by any application that can accept CSV formatted files. Data exported includes:

Report format: Merge file (.mer -- CSV w/headers)

Report runs in: Any application that can accept .mer data format, e.g. Microsoft Word

Report field list:

- ContactRecordType
- ContactName
- ccNameSalutation
- PCL::ContactLocationName
- PCL::OrgTitle
- PCL::OrgOfc
- PCL::OrgDept
- PCLOrg

- PCL::_ccAddressLine1
- PCL::_ccAddressLine2
- PCL::_ccCity
- PCL::_ccStateProv
- PCL::_ccZIPPostalCode
- PCL::_ccZIP4
- PCL::_USPS_ADC
- PCL::_ccCountry
- PCLCounty
- PCL::_ccDisplayPhone
- PCL::Fax
- PhoneMobile
- PhonePager
- PCL::Email
- kContactID
- CON_kContactID\CR_kContactID::LastMemberPaymentAMT
- CON_kContactID\CR_kContactID::LastPaymentAmount
- CON_kContactID\CR_kContactID::LastPaymentDate
- CON_kContactID\CR_kContactID::MemberExpireDate
- CON_kContactID\CR_kContactID::MembershipStatus
- NamePrefix
- NameFirst
- NameLast
- NameSuffix
- GroupLableLine1
- POCCContactName

Email list export

Description: Exports a list of names, primary email addresses, exported as a .mer file (comma-separated values, field headers on first line).

Report format: **Merge file (.mer -- CSV w/headers)**

Report runs in: Any application that can accept .mer files

Report field list:

- ContactName
- PCLEmail

Tips on using the Email list export report

You will need to select where to send the exported data. You can actually choose which file format gets exported by selecting the export format you want in the exporter dialog.

Phone Book

Description: Contains basic phone and contact information. Generates contact name, address, all phone numbers, and a checkbox in a 2-column format. Print only. For use as call list, etc.

Report format: ebase

Report runs in: ebase

Default report header: Phone Book

Report field list:

- ContactName
- _ccContactInfo
- Phone number(s)
- Phone locations

Phone Book

Called	Phone Number	Contact Name		
<input type="checkbox"/>	(222) 1434567	Randolph Holmes	<input type="checkbox"/>	(222) 2434567
<input type="checkbox"/>	(222) 3434567	Lisa Rock	<input type="checkbox"/>	(222) 4434567
<input type="checkbox"/>	(222) 5434567	Michael Tung	<input type="checkbox"/>	(222) 6434567
<input type="checkbox"/>	(222) 7434567	Jim Zarzycki	<input type="checkbox"/>	(222) 8434567
<input type="checkbox"/>	(222) 9434567	Marina Balazs	<input type="checkbox"/>	(222) 1534567
<input type="checkbox"/>	(222) 2534567	Paul Flannery	<input type="checkbox"/>	(222) 3534567
<input type="checkbox"/>	(222) 4534567	Ornetta Johnson	<input type="checkbox"/>	(222) 5534567
<input type="checkbox"/>	(333) 6534567	Jake Rozelle	<input type="checkbox"/>	(333) 7534567
<input type="checkbox"/>	(333) 8534567	Homer Lowney	<input type="checkbox"/>	(333) 9534567
<input type="checkbox"/>	(333) 1634567	Kate Volponi	<input type="checkbox"/>	(333) 2634567
<input type="checkbox"/>	(333) 3634567	Frank Gonzalez	<input type="checkbox"/>	(333) 4634567
				Odetta Johnson

Phone List

Description: Basic telephone list information designed to be used to operate a “phone tree.” Includes contact name, primary phone, and primary address on one line. This report prints a single column list of people with their phone number prominently displayed and sorted by contact name.

Report format: One column, multi-line

Report runs in: ebase

Default report header: Member phone list

Report field list:

- ContactName

- Primary Phone
- Address information

Phone list

Called	Phone Number	Contact Name
<input type="checkbox"/>	(111) 5334567	Akbar Household home: 123 Helena Street, Sacramento, CA 94203, (111) 5334567, cakbar@xlyz.net,
<input type="checkbox"/>	(222) 8434567	Gary Artz home: 335 Woolf Circle, Sacramento, CA 94203, (222) 8434567, gartz@xlyz.net,
<input type="checkbox"/>	(222) 9434567	Marina Balazs home: 336 Harrison Street, Minot, ND 58702, (222) 9434567, mbalazzs@xlyz.net,
<input type="checkbox"/>	(333) 6634567	Fernando Barbieri home: 401 Apollo Street, Savannah, GA 31409, (333) 6634567, fbarbieri@xlyz.net,
<input type="checkbox"/>	(222) 1534567	Rick Chandler home: 337 Sandpiper Way, Columbia, MO 65202, (222) 1534567, rchandler@xlyz.net,
<input type="checkbox"/>	(111) 6234567	Aaron Chumrau Home: 116 Cardinal Street, Springfield, IL 62746, (111) 6234567, aaron@xlyz.com,

Single Contact Log Entry

Description: Listing of Log Entries by category (Bucket1) for the CURRENT RECORD in Contacts.

Report format: List/Summary

Report runs in: ebase

Default report header: Contact History Report

CONTACT HISTORY REPORT

Akbar Household
123 Helena Street
Sacramento, CA 94203

EMAIL cakbar@xyz.net
PHONE (111) 5334567

CATAGORY	DATE	ITEM	AMOUNT
PAYMENT			
	10/15/2005	Mbr payment, steward	\$100.00
	04/30/2005	Donor payment, partner	\$50.00
	11/15/2004	Mbr payment, steward	\$100.00
SOLICITATION			
	10/01/2005	Mbr renewal Jan02 exp ltr 1	
	07/16/2005	Email alert, transportation mtg	
	07/02/2005	Invitation ltr to Gala02	
	06/15/2005	Capital campaign ask, visit	
	04/15/2005	Special appeal 2002 ltr 2	
		TOTAL AMOUNT	\$250.00

ZIP COUNT

Description: Count of number of records with a particular zip code (used for bulk mailings).

Report format: Two columns, multi-line

Report runs in: ebase

Default report header: Zip Code Count

Zip Code Count

ZIPCODE	
	0
01119	1
04330	2
12224	1
13905	3
19147	1
20010	2
30328	2
31409	1
32258	1
33625	1
43219	2
45701	3
58505	1
58702	1
59601	1
62746	2

CONTACT REPORTS

The screenshot shows the 'CONTACT' report category selected in the main menu. The interface includes a sidebar with 'MAIN MENU' and 'REPORTS' sections, and a right-hand panel for 'Reports'.

REPORTS

- Generic
- Contact
- Log Entries
- Membership
- Fundraising
- Legacy
- Special Use
- Update Seasonal Adr
- Omit Location Dups

EMAIL

IMPORT

ADMIN

CONTACT

ALL ADDRESSES FOR CONTACTS (Selected)

UNFINISHED: All addresses on file for each contact in found set.

CONTACT HISTORY LogReports.200 Log Entries Details

Log entry find followed by report of Log entries found, grouped by contact. Displays name, address, and member status for contacts, basic info for each Log entry on screen, with option to

CONTACT LINK REPORT ebase Contacts & Links Details

Log find to select contact records by name, address, or Log history. Displays only contacts that are linked to one or more other contacts. Also displays details for each linked contact.

CONTACTS EXPORT Contacts.200 Contacts Details

Exports names and primary address for Contacts.200 current found set. Allows manual edit of the list of exported fields.

CONTACTS LISTED BY LOG ENTRY ebase Log Entries Details

Select Log entries by entry details, contact name, address, or Log code details. Results presented as list of entries showing contact names and addresses, grouped by code title.

CONTACTS REPORTS EXPORT ContactsReports.2 Contacts Details

Exports data from ContactsReports.200 for current found set of Contacts. Includes option to add a Log item to each contact, to record export.

MAIL HOUSE ADDRESS EXPORT Contacts.200 Contacts Details

Export name and address fields as single line fields without returns or formatting for use in external mailing programs

NAME AND HOME ADDRESS EXPORT Contacts.200 Contacts Details

Exports name and home address data for found set in Contacts.

Print **Main** **Help**

Contact reports connect information stored in ebasePro about Contacts that can be used to report personal data your organization has gathered.

All Addresses for Contacts

Description: Lists all addresses on file for each contact in found set.

Report format: List/Summary

Report runs in: ebase

Default report header: All addresses for selected contacts

Report field list:

- ContactName
- Address, City, State, Zip, Country
- Phone
- Address Location name

All addresses for selected contacts

ContactName		AddressLine2	City	StateProv	ZIP	Phone
Akbar Household						
Celia Akbar	home	123 Helena Street	Sacramento	CA	94203	(111) 5334567
Ted Akbar	Alternate1 home	123 Helena Street	Sacramento	CA	94203	(111) 5334567
Garv Artz	home	123 Helena Street	Sacramento	CA	94203	(111) 5334567
	home	335 Woolf Circle	Sacramento	CA	94203	(222) 8434567
Ms. Volunteer Availability						
Marina Balazs						
Fernando Barbieri	home	336 Harrison Street	Minot	ND	58702	(222) 9434567
Berry Foundation	home	401 Apollo Street	Savannah	GA	31409	(333) 6634567
Roberto Bosch	work	421 Martin Luther King	Minot	ND	58702	(444) 1237898
Deborah Cappa	home	510 Idaho Street	Augusta	ME	04330	(666) 7418529
Rick Chandler	home	411 Kingfisher Avenue	Atlanta	GA	30328	(444) 7734567
Chumrau Household	home	337 Sandpiper Way	Columbia	MO	65202	(222) 1534567
Aaron Chumrau	home	116 Cardinal Street	Springfield	IL	62746	(111) 6234567
Elinor Chumrau	Home Office	116 Cardinal Street	Springfield	IL	62746	(111) 6234567
	home	116 Cardinal Street	Springfield	IL	62746	(111) 6234567

Contact History

Description: Lists basic contact information, then history of select entries within a date range.

Report format: List/Summary

Report runs in: ebase

Default report header: Contact History

Report field list:

- ContactName
- MemberStatus
- ExpireDate
- Address, City, State, Zip, Country
- Email

Log Entry Data

- DatePosted
- EntryTitle
- EntryAmount

- Solicitation
- SolicitorName

Tips on using the Contact History report

The contact history report looks for Contact attributes in Log (e.g. Find log entries whose amounts are greater than \$10), and reports the results for related contacts.

Find Log Entry Data

<input type="button" value="OK"/>	<input type="button" value="Cancel"/>				
Use Log Code Data					
Use Contact Data					
Log CodeTitle ==Mbr payment, associate					
Entry Description					
Note					
From Solicitation					
Amount	Time Start	Time End	Time Elapsed	Quantity	Rate
DatePosted	DateStart	DateEnd	FiscalYear	Accounting Code	
Mbr Payment	Mbr exp date	Mbrship Status	Membership Type		
Grace exp date	TY required?	TY sent date			
Soft Credit Name					
Solicitor Name					
Added By	Add Date	AddTime	AssignedTo	Date.Due	Completed
ModBy	ModDate	ModTime	EntryID	FlagForProblem	Flagged for Del.

Find F1 NUM

The find screen

Contact History

AKBAR HOUSEHOLD	Member Status: Current	Expire Date: 11/15/06
123 Helena Street, Sacramento, CA 94203 Phone: (111) 5334567 cakbar@xyz.net		
DatePosted	Entry Title	EntryAmount
4/30/05	Donor payment, partner	\$50.00
	Solicitation	SolicitorName
	Special	
11/15/04	Mbr payment, steward	\$100.00
	Mbr renewal	
10/15/05	Mbr payment, steward	\$100.00
	Mbr renewal	
 GARY ARTZ	Member Status: Grace	Expire Date: 8/31/06
335 Woolf Circle, Sacramento, CA 94203 Phone: (222) 8434567 gartz@xyz.net		
DatePosted	Entry Title	EntryAmount
8/31/05	Mbr payment, partner	\$50.00
	Solicitation	SolicitorName
	Mbr renewal	
 MARINA BALAZS	Member Status: Grace	Expire Date: 8/31/06
336 Harrison Street, Minot, ND 58702 Phone: (222) 9434567 mbalazs@xyz.net		
DatePosted	Entry Title	EntryAmount
8/31/05	Mbr payment, associate	\$25.00
	Solicitation	SolicitorName
	Mbr renewal	

The Contact History report format

Contact Link report

Description: Report which provides contact details for the people linked to one or more contacts. The Contact Link report creates a set of Contacts (using Log entry attributes), then reports Contact information for the Contact, plus contact information for those people, families and organizations linked to a particular contact inside ebasePro.

Report format: List/Summary

Report runs in: ebase

Default report header: Contact Link report

Report field list:

- HouseholdName (FamilyName)
- Address
- City
- State
- Zip
- Country
- Phone
- Email

Link data

- ContactName
- Address
- City
- State
- Zip
- Country
- Phone
- Email

Contact Link report**Chumrau Household**

116 Cardinal Street, Springfield, IL 62746 Phone: (111) 6234567 achumrau@xlyz.net

Member of	Elinor Chumrau	116 Cardinal Street, Springfield, IL 62746 Phone: (111) 6234567 achumrau@xlyz.net
Member of	Aaron Chumrau	116 Cardinal Street, Springfield, IL 62746 Phone: (111) 6234567 aaron@xlyz.com

Aaron Chumrau

116 Cardinal Street, Springfield, IL 62746 Phone: (111) 6234567 aaron@xlyz.com

Family	Chumrau Household	116 Cardinal Street, Springfield, IL 62746 Phone: (111) 6234567 achumrau@xlyz.net
--------	-------------------	--

Tips on using the “Contact Link” report

Remember that the Contact Links report requires your found set be made up of entries. This is so you can do things like find high-dollar donors and find out who they are related to; or, find people who attended an event or class and find out who they are linked to.

Contacts Export

Description: Uses Contacts “found set” and exports user-selected Contact data fields in .mer format.

This report allows you to “log” the export: in other words, this export lets you decide if you want to track the export. You choose a particular log entry to be added to each contact in the found set to reflect that you did something with that group.

Then, it will prompt the user to name the export file and select fields to export.

Report format: Export

Report runs in: This report generates a data export.

Report field list: All fields in ContactReports and any related field data in Log, Links or Contacts. Basically, any data stored in ebasePro. Defaults to:

- ContactName
- ccNameSalutation

- ccNameSorter
- PCLOrg
- POCCContactName
- PCLOrgDept
- PCLAddline1
- PCLAddline2
- PCLCity
- PCLState
- PCLZip
- PCLZip4
- PCLCountry
- ContactRecordType
- PCL_IndividualNameLine
- GroupLableLine1
- GroupLableLine2
- kContactID

Tips on using the “Contacts, custom export” report

Using the FileMaker relationships function inside the export dialog, you can select and export virtually any field related to a contact. The trick is to know which fields contain the data you want to export. For details on how fields are named, see the Developer Documentation section of this manual.

Contacts Listed by Log Entry

Description: Selects Log entries by entry details, contact name, address or Log code.

Report format: List/Summary

Report runs in: ebase

Default report header: Contact Listed by Log Entry

Report field list:

- Log Code Title
- ContactName
- Address, city, State, Zip, Country
- Phone
- Email

Entries grouped by code, showing contact info

ACTIVIST AVAILABLE ANYTIME		5 Entry(s):
Activist available anytime		
DEBORAH CAPPA	411 Kingfisher Avenue, Atlanta, GA 30328 Phone: (444) 7734567 dcappa@xlyz.net	
ORNETTA JOHNSON	340 Emerson Drive, Shreveport, LA 71153 Phone: (222) 4534567 ojohnson@xlyz.net	
ORNETTA JOHNSON	340 Emerson Drive, Shreveport, LA 71153 Phone: (222) 4534567 ojohnson@xlyz.net	
PHOEBE MCINTYRE	341 Dickinson Drive, Sacramento, CA 94203 Phone: (222) 5534567 pmcintyre@xlyz.net	
JAKE ROZELLE	342 Strackey Street, San Diego, CA 92152 Phone: (333) 6534567 jrozelle@xlyz.net	

Contact Reports Export:

Description: Exports data from ContactsReports.200 for current found set of Contacts.

Report runs in: This report generates a data export.

Report field list (default):

- ConID::ContactName
- ConID::_ccNameSalutation
- ConID::POCContactName
- ConID::POCSalutation
- ConID::GreetingCustom
- ConID::ContactRecordType
- ConID::NamePrefix
- ConID::NameFirst
- ConID::NameMiddle
- ConID::NameLast
- ConID::NameSuffix
- ConID::NameNickname
- ConID::GroupLableLine1
- ConID::GroupLableLine2
- ConID::PCLOrg
- ConID::PCLAddline1
- ConID::PCLAddline2
- ConID::PCLCity
- ConID::PCLState
- ConID::PCLZip
- ConID::PCLZip4

- ConID::PCLCountry
- ConID::PCLEmail
- ConID::PCLPhone
- ConID::ProfileNote
- ConID::_kContactID

Mail House Address Export

Description: Exports name and address fields as single line fields without returns or formatting for use in external mailing programs.

Report runs in: This report generates a data export.

Report field list (default):

- ContactName
- ccNameSalutation
- ccNameSorter
- PCLOrg
- POCCContactName
- PCLOrgDept
- PCLAddline1
- PCLAddline2
- PCLCity
- PCLState
- PCLZip
- PCLZip4
- PCLCountry
- ContactRecordType
- PCL_IndividualNameLine
- GroupLableLine1
- GroupLableLine2
- kContactID

Name and Home Address Export

Description: Exports name and home address for found set in Contacts.

Report runs in: This report generates a data export.

Report field list (default):

- ContactName
- ccNameSalutation
- ccNameSorter
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::ContactLocationName
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::Email

- CON_kcHomeCoLo\COL_kcCoLoNameContactID::Fax
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::Phone
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::URL
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccAddressLine1
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccAddressLine2
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccCity
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccStateProv
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccZIPPostalCode
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccZIP4
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccCounty
- CON_kcHomeCoLo\COL_kcCoLoNameContactID::_ccCountry

LOG ENTRIES REPORTS

Amount Report

Description: General purpose report for listing Log entries for fiscal transactions with optional summaries.

Report format: List/Summary

Report runs in: LogReports.200

Default report header: Amount report

Amount Report (Detail)

Your Organization's Name Here
AMOUNT REPORT
By Log Code and/or Date (Detail)

POST DATE	NAME	LOG CODE	CK #	AMOUNT
Payment				
Capital campaign payment,				
7.2.2005	Frank Gonzalez	Capital campaign payment,		\$1000.00
		Total For: Capital Campaign Payment, Sustainer		\$1000.00
Donor payment, associate				
4.30.2005	Dea McDiamond	Donor payment, associate		\$25.00
4.30.2005	Lisa Rook	Donor payment, associate		\$25.00
4.30.2005	Michael Tung	Donor payment, associate		\$25.00
4.30.2005	Jon Tso	Donor payment, associate		\$25.00
4.30.2005	Kelsey Watson	Donor payment, associate		\$25.00
4.30.2005	Jim Zarzyski	Donor payment, associate		\$25.00
		Total For: Donor Payment, Associate		\$150.00
Donor payment, partner				
4.30.2005	Akbar Household	Donor payment, partner		\$60.00
4.30.2005	Harold de Blanc	Donor payment, partner		\$60.00
4.30.2005	Ludwig Graf	Donor payment, partner		\$60.00
4.30.2005	Randolph Holmes	Donor payment, partner		\$60.00
4.30.2005	Molina Household	Donor payment, partner		\$60.00
4.30.2005	Rasmussen/Piondexter	Donor payment, partner		\$60.00
4.30.2005	Runsabove Household	Donor payment, partner		\$60.00
4.30.2005	Ryan Household	Donor payment, partner		\$60.00
		Total For: Donor Payment, Partner		\$400.00

Amount Report (Summary)

<input type="button" value="Print"/>	Your Organization's Name Here				
AMOUNT REPORT					
	POST DATE	NAME	LOG CODE	CK #	AMOUNT
Payment					
Capital campaign payment, sustainer					
Total For: Capital Campaign Payment, Sustainer					\$1000.00
Donor payment, associate					
Total For: Donor Payment, Associate					\$150.00
Donor payment, partner					
Total For: Donor Payment, Partner					\$400.00
Donor payment, steward					
Total For: Donor Payment, Steward					\$100.00
Mbr payment, associate					
Total For: Mbr Payment, Associate					\$750.00

Basic Log Entry Report

Description: Log find followed by export of Log and Contact data related to Log entries found.

Report format: Export

Report runs in: LogReports.200

Default fields exported:

- LOG::DatePosted
- LOG::ItemAmount
- LOG::ItemDescription
- LOG::ItemNote
- LOG::DateThankYouSent
- LOG::ForSolicitationID
- LOG::PaymentMethod
- LOG::CheckNumber
- LOG::SoftCreditName
- LOG::SolicitorName
- LOG::_cdPeriodEndDateCalc
- LOG::_cdGracePeriodEndDateCalc
- CON::ContactName
- CON::_ccNameSalutation
- CON::POCContactName
- CON::POCSalutation

- CON::NamePrefix
- CON::NameFirst
- CON::NameMiddle
- CON::NameLast
- CON::NameNickname
- CON::NameSuffix
- CON::GroupLableLine1
- CON::GroupLableLine2
- CON::GreetingCustom
- CON::_ccNameSorter
- CON::PCLOrgTitle
- CON::PCLOrg
- CON::PCLOrgCatagory
- CON::PCLAddressLabel
- CON::PCLAddline1
- CON::PCLAddline2
- CON::PCLCity
- CON::PCLCountry
- CON::PCLState
- CON::PCLZip
- CON::PCLZip4
- CON::PCLEmail
- CON::PCLPhone
- CON::ProfileNote
- CON::ProfileCustom1
- LOG::DateStart
- LOG::DateEnd
- LOG::DateTarget
- LOG::Quantity
- LOG::Rate
- LOG::FiscalYear
- LOG::Text1
- LOG::_kCodeID
- LOG::_kItemID
- LOG::_kAssignedTo

- LOG::_fDelete
- LOG::_fMemberPayment
- LOG::_fPledge
- CON::_fDoNotContact
- LOG::SolicitTitle
- LOG::_ccCodeTitle
- LOG::_ccCodeDescription
- LOG::_ccCode
- CONR::MemberExpireDate
- CONR::MemberExpireGraceDate
- CONR::MembershipStatus

Quantity Report

Description: General purpose report for listing Log entry Quantity data. Summarized by Code title.

Report format: List/Summary

Report runs in: LogReports.200

Default report header: Quantity report

Your Organization's Name Here
Quantity Report
By Log Code and Code (Detail)

POST DATE	NAME	QUANTITY
Payment on Pledge		
1.2.2006	Aaron Chumrau	
5.31.2006	Betty Feldman	
8.26.2006	Allen Poole	
8.26.2006	Allen Poole	
5.26.2006	Recurring Monthly Donors	
6.26.2006	Recurring Monthly Donors	
7.26.2006	Recurring Monthly Donors	
8.26.2006	Recurring Monthly Donors	
9.26.2006	Recurring Monthly Donors	
Total For: Payment On Pledge		
Capital campaign payment,		
7.2.2005	Frank Gonzalez	
Total For: Capital Campaign Payment, Sustainer		
Donor payment, associate		
4.30.2005	Dea McDiarmid	
4.30.2005	Lisa Rock	
4.30.2005	Michael T'ung	
4.30.2005	Jon Tso	
4.30.2005	Kelsey Watson	
4.30.2005	Jim Zarzyski	
Total For: Donor Payment, Associate		

MEMBERSHIP REPORTS

Member export

Description: Export set of members based on status, etc. First prompts you to select a group of members based on a variety of membership attributes. Then, the report exports the data listed below.

Report format: Export

Report runs in: Data Export

Report field list:

- ConID::ContactName
- ConID::NameFirst
- ConID::NameLast
- ConID::NameMiddle
- ConID::NameNickname
- ConID::NamePrefix
- ConID::_ccNameSalutation
- ConID::NameSuffix

- ConID::PCLAddline1
- ConID::PCLAddline2
- ConID::PCLCity
- ConID::PCLCityline
- ConID::PCLCountry
- ConID::PCLEmail
- ConID::PCLOrg
- ConID::PCLPhone
- ConID::PCLState
- ConID::PCLZip
- ConID::PCLZip4
- MembershipStatus
- MemberExpireDate
- Member\$LastPosted
- LastMemberPaymentAMT
- Member\$Largest

Tips on using the Email list - export report

While the list above details the default fields exported with this report, you have the option of adding or subtracting fields from the export using the FileMaker Pro Export dialog.

Member renewal export

Description: Uses Contacts found set for use in Mbr Renewal letters. Exports your current found set of Contacts. Includes member status amount of last member payment etc. for use in renewal letters.

Report format: Export

Report runs in: Data Export

Report field list:

- ConID::ContactName
- ConID::NameFirst
- ConID::NameLast
- ConID::NameMiddle
- ConID::NameNickname
- ConID::NamePrefix
- ConID::_ccNameSalutation
- ConID::NameSuffix
- ConID::PCLAddline1
- ConID::PCLAddline2
- ConID::PCLCity

- ConID::PCLCityline
- ConID::PCLCountry
- ConID::PCLEmail
- ConID::PCLOrg
- ConID::PCLPhone
- ConID::PCLState
- ConID::PCLZip
- ConID::PCLZip4
- MembershipStatus
- MemberExpireDate
- Member\$LastPosted
- LastMemberPaymentAMT
- Member\$Largest

Tips on using the Member renewal

While the list above details the default fields exported with this report you have the option of adding or subtracting fields from the export using the FileMaker Pro Export dialog.

Members Current

Description: Quick-and-dirty current member list

Report format: List, print-only

Report runs in: ebase

Default report header: Current Members

Report field list:

- ContactName
- Address
- Primary Phone
- Primary Email
- Contact By
- LastPaymentAmount
- LastPaymentDate

Your Organization's Name Here

Current Members

Name, Address	Primary Phone, Email	ContactBy	Last Payment	Mbrshp Expires
Kelsey Watson 333 Loon Lane Springfield, IL 62746	(222) 6434567 kwatson@xlyz.net	mail	\$60.00 8/31/2005	8/31/2006
Jim Zarzyski 334 Pheasant Street Olympia, WA 98501	(222) 7434567 jzarzyski@xlyz.net	email	\$60.00 8/31/2005	8/31/2006
Gary Artz 335 Woolf Circle Sacramento, CA 94203	(222) 8434567 gartz@xlyz.net	phone	\$60.00 8/31/2005	8/31/2006
Marina Balazs 336 Harrison Street Minot, ND 58702	(222) 9434567 mbalazs@xlyz.net	mail	\$25.00 8/31/2005	8/31/2006
Rick Chandler 337 Sandpiper Way Columbia, MO 65202	(222) 1534567 rchandler@xlyz.net	phone	\$25.00 8/31/2005	8/31/2006

FUNDRAISING REPORTS

Activity Response

Description: On screen report with option to print, that can summarize volunteer hours worked by campaign or by person..

Report format: List/Summary. Can either select detail or summary report format.

Report runs in: ebase

Default report header: Activity Response Report

Detail report:

Your Organization's Name Here

Acitivity response report

	Resp #	Resp %	Hours		
Ornetta Johnson					
Ornetta Johnson on 12/16/2003: 0 Hours					
		Hours			
Ornetta Johnson Total:			0		
Phoebe McIntyre					
Phoebe McIntyre on 12/16/2003: 0 Hours					
		Hours			
Phoebe McIntyre Total:			0		
Jake Rozelle					
Jake Rozelle on 12/16/2003: 0 Hours					
		Hours			
Jake Rozelle Total:			0		
Deborah Cappa					
Deborah Cappa on 8/1/2005: 0 Hours					
		Hours			
Deborah Cappa Total:			0		
Ornetta Johnson					
Ornetta Johnson on 8/22/2006: 0 Hours					
		Hours			
Ornetta Johnson Total:			0		
	Qty	Cost	Resp #	Resp %	Hours
Grand Total:		0	?		0

Summary report:

Your Organization's Name Here

Activity response report

Mail Qty	Cost	Resp #	Resp %	Hours
----------	------	--------	--------	-------

Complete Donor History

Description: This report is intended to provide a complete donor history (including historical giving information). The report is intended to be used by a solicitor, sales person or development department staff as a research tool. The Complete Donor History uses Contact data to produce results. Keep in mind that the more you track interactions with your contacts in ebase, the more complete the history will be and the greater depth this report will provide.

Report format: List/Summary

Report runs in: ebase

Default report header: Complete Donor History

Report field list:

- All gifts ever given
- Average gift
- Date of birth
- Email and phone
- Employer
- Gender
- Gift Dates Solicitations (that gifts responded to)
- Largest gift
- Links
- Member payment totals (for last 5 years)
- Member Status
- Membership Expiration Date
- Name Address
- Occupation
- Payment
- Payment totals (for last 5 years)
- Pledge totals (for last
- Preferred contact method
- Profile note

- Short bio
- Solicitor
- Source
- Total lifetime gifts given

Complete Donor History: SmartEnergy

Contact Info		SmartEnergy		
427 Mississippi Avenue, Springfield, IL 62746 Phone: (555) 1237886 sjohnson@xyz.net				
Personal Info				
Preferred Contact Method:	phone	Preferred Salutation:	Friends	
Date Of Birth:	staff contact	Occupation:		
Bio Short:	F	Employer:		
Profile Note				
Summary Data				
Member Payments		All Payments	Pledges	
Most Recent Pmt	Most Recent Pmt Date	Most Recent Pmt	Most Recent Pledge	
Most Recent Pmt Date	This FY	This FY \$0.00	Most Recent Pledge Date	
	Last FY	Last FY \$0.00	Pledged All	
	Last 2 FY	2 FY Back	Pledged This CY \$0.00	
	2 FY Back	3 FY Back	Pledged Last CY \$0.00	
	3 FY Back	4 FY Back	Pledged Last 2 CY \$0.00	
	4 FY Back	5 FY Back		
	5 FY Back	Last 5 FY \$0.00		
	This CY	This CY \$0.00		
	Last CY	Last CY \$0.00		
	Last 2 CY	2 CY Back		
	Total \$0.00	3 CY Back		
	Largest \$0.00	4 CY Back		
		5 CY Back		
		Last 5 CY \$0.00		
Status				
Member Status	None	Expire Date:		
All Payments Total	\$0.00	Largest Payment	\$0.00	
Avg. Payment				
Links				
Interaction Log				
Date Posted	Entry Title	Entry Amount	Solicitation	Solicitor Name
8/30/05	Newsletter sent			
8/30/05	Newsletter sent			
11/1/03	Collaborating organization			

Deposit report

The Deposit Report lets you organize and summarize financial entries such as payments. Options for the Deposit report let you choose a detail, or summary, view. A detail view lets you

see each individual entry on a separate line with totals. A summary view displays just the totals of groups of entries.

Report format: List

Report runs in: ebase

Default report header: DEPOSIT REPORT, 00/00/0000

DescriptionList of payments received, totals. Choose summary or detail. Print only.

Report field list:

- _kCodeTitle
- DatePosted
- ContactName
- Check#
- EntryAmount
- Total for each code title
- Grand total

Deposit report-Detail

Your Organization's Name Here
DEPOSIT REPORT
By Log Code and/or Date (Detail)

POST DATE	NAME	LOG CODE	CK #	AMOUNT
4.15.2004	Einer Horvath	Mbr payment, associate		\$25.00
4.15.2004	Hugh La Fromboise	Mbr payment, associate		\$25.00
Subtotal for week 16 of 2004				\$50.00
Subtotal for month April				\$50.00
11.15.2004	Georgia Milburn	Mbr payment, associate		\$25.00
11.15.2004	Harold de Blanc	Mbr payment, associate		\$25.00
11.15.2004	Ludwig Graf	Mbr payment, associate		\$25.00
11.15.2004	Randolph Holmes	Mbr payment, associate		\$25.00
11.15.2004	Lisa Rock	Mbr payment, associate		\$25.00
11.15.2004	Paul Flannery	Mbr payment, associate		\$25.00
11.15.2004	Nora Goode	Mbr payment, associate		\$25.00
11.15.2004	Ornetta Johnson	Mbr payment, associate		\$25.00
11.15.2004	Homer Lowney	Mbr payment, associate		\$25.00
11.15.2004	Peggy Zahavi	Mbr payment, associate		\$25.00
11.15.2004	Dea McDiarmid	Mbr payment, champion		\$250.00
11.15.2004	Berta Revueltas	Mbr payment, partner		\$50.00
11.15.2004	Heather Swansea	Mbr payment, partner		\$50.00
11.15.2004	Jon Tso	Mbr payment, partner		\$50.00
11.15.2004	Michael T'ung	Mbr payment, partner		\$50.00
11.15.2004	Phoebe McIntyre	Mbr payment, partner		\$50.00
11.15.2004	Jake Rozelle	Mbr payment, partner		\$50.00
11.15.2004	Paula Kucera	Mbr payment, partner		\$50.00
11.15.2004	Kate Volponi	Mbr payment, steward		\$100.00
11.15.2004	Elijah Wong	Mbr payment, steward		\$100.00
11.15.2004	Frank Gonzalez	Mbr payment, steward		\$100.00
11.15.2004	Odetta Johnson	Mbr payment, steward		\$100.00
11.15.2004	Miriam Treacy	Mbr payment, steward		\$100.00
11.15.2004	Molina Household	Mbr payment, champion		\$250.00

Tips on using the “Deposit report” report

1. Click on REPORTS-->Deposit Report to begin specifying which records will be displayed in the report.
2. At this point, you may see a dialogue box informing you that ebase will begin updating IDs, and that this might take a long time for large databases. Click "OK."
3. Enter your desired search criteria in one or multiple fields on the Enter Deposit Report Selection Criteria screen. For example, to report checks deposited in May of 2002, enter "5/1/2002...5/31/2002" in the "Post Date" field and "Check" in the "Pay Method" field, and then click "OK."
4. Click "OK" and click on the report version, Detail or Summary, you wish to see.
5. Press <Enter> on your keyboard to return.

Deposit report-Summary

Your Organization's Name Here

DEPOSIT REPORT

POST DATE	NAME	LOG CODE	CK #	AMOUNT
Subtotal for week 16 of 2004				\$50.00
Subtotal for week 47 of 2004				\$1950.00
Subtotal for year 2004				\$2000.00
Subtotal for week 18 of 2005				\$650.00
Subtotal for week 27 of 2005				\$1000.00
Subtotal for week 29 of 2005				\$200.00
Subtotal for week 32 of 2005				\$900.00
Subtotal for week 36 of 2005				\$800.00
Subtotal for week 42 of 2005				\$1275.00
Subtotal for week 47 of 2005				\$325.00
Subtotal for year 2005				\$6150.00
Subtotal for week 1 of 2006				\$150.00
Subtotal for week 21 of 2006				\$25.00
Subtotal for week 22 of 2006				\$600.00
Subtotal for week 26 of 2006				\$25.00
Subtotal for week 30 of 2006				\$25.00
Subtotal for week 34 of 2006				\$105.00
Subtotal for week 39 of 2006				\$25.00
Subtotal for year 2006				\$855.00
GRAND TOTAL:				\$8005.00

Donor & Solicitor report

Description: Format used to display donors, the solicitor name (the name of the person who "triggered" the donation and donation amount. Totals donations for campaign. Print only.

Report format: List/Summary

Report runs in: ebase

Default report header: Donor and Solicitor Report

Report field list:

- ContactName
- PCLShortInfo

For each record found, displays:

- _ccCode Title
- DatePosted
- EntryAmount
- Member Type
- SolicitationTitle
- Solicitor

Donor and Solicitor Report

Total: \$8770.00

Akbar Household

home: 123 Helena Street, Sacramento, CA 94203, (111) 5334567, cakbar@xyz.net,

ENTRY TITLE	SOLICIT TITLE	SOLICITOR NAME	AMOUNT	DATEPOSTED	PAYMENT FOR
Mbr payment, steward	Mbr renewal		\$100.00	11/15/04	Renewal
Donor payment, partner	Special		\$50.00	4/30/05	
Mbr payment, steward	Mbr renewal		\$100.00	10/15/05	Renewal

Gary Artz

home: 335 Woolf Circle, Sacramento, CA 94203, (222) 8434567, gartz@xyz.net,

ENTRY TITLE	SOLICIT TITLE	SOLICITOR NAME	AMOUNT	DATEPOSTED	PAYMENT FOR
Mbr payment, partner	Mbr renewal		\$50.00	8/31/05	Renewal

Marina Balazs

home: 336 Harrison Street, Minot, ND 58702, (222) 9434567, mbalazs@xyz.net,

ENTRY TITLE	SOLICIT TITLE	SOLICITOR NAME	AMOUNT	DATEPOSTED	PAYMENT FOR
Mbr payment, associate	Mbr renewal		\$25.00	8/31/05	Renewal

Fernando Barbieri

home: 401 Apollo Street, Savannah, GA 31409, (333) 6634567, fbarbieri@xyz.net,

ENTRY TITLE	SOLICIT TITLE	SOLICITOR NAME	AMOUNT	DATEPOSTED	PAYMENT FOR
Mbr payment, associate	Mbr prospect		\$25.00	8/31/05	New

Rick Chandler

home: 337 Sandpiper Way, Columbia, MO 65202, (222) 1534567, rchandler@xyz.net,

ENTRY TITLE	SOLICIT TITLE	SOLICITOR NAME	AMOUNT	DATEPOSTED	PAYMENT FOR
Mbr payment, associate	Mbr renewal		\$25.00	8/31/05	Renewal

Sunday, September 10,

LYBUNT List

Description: Creates a list of donors who gave Last Year but Unfortunately Not This year

Report format: List/Summary

Report runs in: ebase

Default report header: Gave Last Year But Not This Year

Report field list:

- ContactBy
- ContactName
- LastPaymentDate
- LastPostedPayment\$
- PCLContactAddressFull
- PCLEmail
- PCLPhone

Your Organization's Name Here

Gave in the 12 months before 1/1/2006 but not 1/1/2006-12/31/2006

Name, Address	Primary Phone, Email	ContactBy	Last Payment	Mbrshp Expires
Randolph Holmes 128 Aster Street Atlanta, GA 30328	(222) 1434567 rholmes@xlyz.net	email	\$25.00 11/15/2005	11/15/2006
Dea McDiarmid 129 Condor Street Anchorage, AK 99501	(222) 2434567 dmediarmid@xlyz.net	phone	\$25.00 11/15/2005	11/15/2006
Lisa Rock 330 Quail Street Albuquerque, NM 87195	(222) 3434567 lrock@xlyz.net	mail	\$25.00 11/15/2005	11/15/2006
Jon Tso 331 Oriole Avenue Walla Walla, WA 99362	(222) 4434567 jtso@xlyz.net	email	\$50.00 11/15/2005	11/15/2006
Michael Tung 332 Poppy Street Binghamton, NY 13905	(222) 5434567 mtung@xlyz.net	phone	\$50.00 11/15/2005	11/15/2006

Member Giving – YTD

Description: Report of member giving in the past year. Your organization must have defined membership gifts and must track them as memberships in ebase before the Member Giving report will be of use.

Report format:

Report runs in:

Default report header: **Member Giving – YTD**

Report field list:

- 1YTD Dues\$
- 1YTD TOT\$
- Address, city, state, zip,
- Expire date
- Life Dues\$

- LIFE TOT\$
- Name
- Phone(s)
- YTD Dues\$ -
- YTD TOT\$ -

Your Organization's Name Here Calendar Year: Member Giving – YTD						
ExpireDate	Member	Member Payments		Payments		
		This Year	Last Year	MemberTotal	This Year	Last Year
11/15/2006	Akbar Household	100.00	200.00	0.00	150.00	250.00
CURRENT	123 Helena Street, Sacramento, CA 94203 Phone: (111) 5334567			cakbar@xyz.net		
None	Celia Akbar	0.00	0.00	0.00	0.00	0.00
	123 Helena Street, Sacramento, CA 94203 Phone: (111) 5334567			cakbar@xyz.net		
None	Ted Akbar	0.00	0.00	0.00	0.00	0.00
	123 Helena Street, Sacramento, CA 94203 Phone: (111) 5334567			cakbar@xyz.net		
8/31/2006	Gary Artz	50.00	50.00	0.00	50.00	50.00
GRACE	335 Woolf Circle, Sacramento, CA 94203 Phone: (222) 8434567			gartz@xyz.net		
None	Ms. Volunteer	0.00	0.00	0.00	0.00	0.00
8/31/2006	Marina Balazs	25.00	25.00	0.00	25.00	25.00
GRACE	336 Harrison Street, Minot, ND 58702 Phone: (222) 9434567			mabalazs@xyz.net		
8/31/2006	Fernando Barbieri	25.00	25.00	0.00	25.00	25.00
GRACE	401 Apollo Street, Savannah, GA 31409 Phone: (333) 6634567			fbarbieri@xyz.net		
None	Berry Foundation	0.00	0.00	0.00	0.00	0.00
	421 Martin Luther King Street, Minot, ND 58702 Phone: (444) 1237898			tcohen@xyz.net		
None	Roberto Bosch	0.00	0.00	0.00	0.00	0.00
	510 Idaho Street, Augusta, ME 04330 Phone: (666) 7418529			rbosch@xyz.net		
None	Deborah Cappa	0.00	0.00	0.00	0.00	0.00
	411 Kingfisher Avenue, Atlanta, GA 30328 Phone: (444) 7734567			dcappa@xyz.net		
8/31/2006	Rick Chandler	25.00	25.00	0.00	25.00	25.00
GRACE	337 Sandpiper Way, Columbia, MO 65202 Phone: (222) 1534567			rchandler@xyz.net		

Pledge Report

Description: Creates a list of all pledges (open, closed, etc.) and individual pledge balances.. Print only.

Report format: List

Report runs in: ebase

Default report header: Pledge Report, //

Report field list:

- Amt pledged
- Balance
- Balancedue
- ContactName
- PledgeDescription (_kCodetTitle)
- Sum of payments

- Total Payments

- Total Pledges

Payment history portal

- Date
- Entry name
- EntryAmount

Your Organization's Name Here															
Pledge Report, II															
Total Payments: \$205.00		Total Pledges: \$65.00													
Recurring Monthly Donors		Payment History													
Pledged	SumPayments	BalanceDue	<table border="1"> <tr><td>Payment</td><td>5/26/2006</td><td>25.00</td></tr> <tr><td>Payment</td><td>6/26/2006</td><td>25.00</td></tr> <tr><td>Payment</td><td>7/26/2006</td><td>25.00</td></tr> <tr><td>Payment</td><td>8/26/2006</td><td>25.00</td></tr> </table>	Payment	5/26/2006	25.00	Payment	6/26/2006	25.00	Payment	7/26/2006	25.00	Payment	8/26/2006	25.00
Payment	5/26/2006	25.00													
Payment	6/26/2006	25.00													
Payment	7/26/2006	25.00													
Payment	8/26/2006	25.00													
\$25.00	\$125.00	-\$100.00													
Allen Poole		Payment History													
Pledged	SumPayments	BalanceDue	<table border="1"> <tr><td>Payment</td><td>8/26/2006</td><td>40.00</td></tr> <tr><td>Payment</td><td>8/26/2006</td><td>40.00</td></tr> </table>	Payment	8/26/2006	40.00	Payment	8/26/2006	40.00						
Payment	8/26/2006	40.00													
Payment	8/26/2006	40.00													
\$40.00	\$80.00	-\$40.00													
Total Payments: \$205.00		Total Pledges: \$65.00													
		Balance: \$140.00													

Tips on using the Pledge Report report

The pledge report will look for ALL of your pledges, and report individual pledges and balances due.

Response Analysis

Description: List or summary of gifts received toward appeal(s). Choose summary or detail. Print only. The Response Analysis report lets you display and analyze the relationship between your outgoing communication (typically fundraising solicitations) and your contact's responses. This report is essential when evaluating the success of a particular solicitation. It compares the total cost of a solicitation with the total money that solicitation brought in. With this tool, your organization can determine which solicitations are the most effective and efficient.

- A detail view lets you see each individual response on a separate line.
- A summary view displays summary information about groups of responses.

Report format: List/Summary

Report runs in: ebase

Default report header:

Report field list:

Summary and Detail

- % Responses
- Average \$ amount
- Cost

- Mail quantity
- Number of responses
- Solicitation name (_kCodeTitle)

Detail

- ContactName

Response Analysis-Detailed Report:

Your Organization's Name Here**RESPONSE ANALYSIS REPORT****Your Organization's Name Here Response Analysis Report (Summary)**

Resp \$

Solicitation:

Entry: **Assisted with Gala02** 0

8/31/06 by Aaron Chumrau

7/31/05 by Lisa Rock

7/31/05 by Jon Tso

	Mail Qty	Cost	Resp #	Resp %	Avg \$	Total \$	Net \$
Total:	0		?				
					Max \$		
					Min \$		

Solicitation: **Email alert, local food tabling**Entry: **Worked on local food tabling** 0

6/1/05 by Deborah Cappa

6/1/05 by Rick Chandler

6/1/05 by Luis Molina

	Mail Qty	Cost	Resp #	Resp %	Avg \$	Total \$	Net \$
Email alert, local food tabling Total:	0		?				
					Max \$		
					Min \$		

Response Analysis-Summary Report:

Your Organization's Name Here							
Response Analysis Report							
Mail Qty	Cost	Resp #	Resp %	Avg \$	Resp \$	Net \$	
Bucket 1 = Action							
Entry Title: Assisted with Gala02 Range: \$ - \$							
All Action entries		0 ?					
Total for: Range: \$ - \$							
Email alert, local food tabling							
Bucket 1 = Action							
Entry Title: Worked on local food tabling Range: \$ - \$							
All Action entries		0 ?					
Total for Email alert, local food tabling: Range: \$ - \$							

Tips on using the Response Analysis report

To use the cost-benefit analysis in this report, cost information for a solicitation needs to be entered in the solicitation entry code information.

- This response report was designed to measure responses for fundraising purposes.
- The response analysis report can run an analysis on one Solicitation or multiple.

Steps

1. Click REPORTS-->Response Analysis to begin specifying which records will be displayed in the report.
2. At this point, you may see a dialogue box informing you that ebase will begin updating IDs, and that this might take a long time for large databases. Click "OK."
3. Enter your desired search criteria in one or multiple fields on the Enter Response Analysis Selection Criteria screen:
 - Solicitation Code and Mail Date fields will search for entries according to the solicitation (or other entry) they respond to. For example, to report the response to a particular solicitation, select its code title from the "Solicitation Code" field. To report all contributions for solicitations sent in calendar year 2002, type "1/1/2002...12/31/2002" in the "Mail Date" field.
 - Entry Amount field will search for all payments that meet a dollar amount criterion. For instance, entering ">100" will find all payments over \$100.
 - Code Bucket 1-8 fields will search for responses to all solicitations that meet the criteria you enter in one or more code bucket fields in the eight fields under the "Create Your Own Custom Group" header. For example, to report payments made toward the capital campaign, chose the class "Payment" from the first field (Bucket 1) and the project "CapCamp" from the third field (Bucket 3).

- Multiple fields will search for records that meet all these search criteria at the same time. For example, to search for all payments over \$100 made in response to your June 2002 solicitations, type ">100" in the "Entry Amount" field, "6/1/2002...6/30/2002" in the "Mail Date" field, and "Payment" in the first code bucket field. To find response rates to member renewal mailings, enter "Payment" in the first code bucket field and the other bucket values(s) you use to identify renewal mailings in your code system. (In the sample code set shipped with ebase, the search criteria would be "Payment" in Bucket 1 and "Mbr" in Bucket 3.)
4. Click "OK" and click on the report version, Detail or Summary, you wish to see.
 5. Press <Enter> on your keyboard to prompt the Print dialogue and click "OK" and "OK" or "Cancel" and "Cancel," depending on whether you want to print the report.

Soft Credit Report

Description: Reports donations made in the name of someone else (can be a corporate match, etc. payment). Lists donor, "soft" creditor, amount, and total. The data entry field "soft credit" is located on payment screens.

NOTE: Some organizations use this method to connect gift or tribute recipients with their donors. Be advised, this is not the industry standard definition of "soft credit".

Report format: List/Summary

Report runs in: ebase

Default report header: Soft Credit report

Report field list:

- CodeTitle
- ContactName
- DatePosted
- EntryAmount
- SoftCreditName
- SumAmount

Soft Credit report

AARON CHUMRAU		Total: \$25.00		
DONOR NAME	AMOUNT	DATEPOSTED	ENTRY TITLE	SOFT CREDITOR
Recurring Monthly	\$25.00	5/26/06	Pledge Recurring	Aaron Chumrau

Solicitation Deposit report

Description: Log find followed by onscreen detail report of Log entries found, or grouped by Solicitation name, with option to print.

Report format: List/Summary

Report runs in: ebase

Description: Default report header: **Solicitation Deposit report**

Your Organization's Name Here						
SOLICITATION DEPOSIT REPORT						
By Solicitation, Entry Code and Code (Detail)						
POST DATE	NAME	ADDRESS	SOLICITITLE	U CODE	ENTRY CODE	CK#
AMOUNT						
08.26.06	Allen Poole	3640 SE 26th Ave.			Payment on Pledge	\$40.00
08.26.06	Allen Poole	3640 SE 26th Ave.			Payment on Pledge	\$40.00
08.26.06	Allen Poole	3640 SE 26th Ave.			Pledge Building Fund	\$200.00
08.26.06	Allen Poole	3640 SE 26th Ave.			Pledge Recurring	\$40.00
05.26.06	Recurring Monthly Donors				Payment on Pledge	\$25.00
06.26.06	Recurring Monthly Donors				Payment on Pledge	\$25.00
07.26.06	Recurring Monthly Donors				Payment on Pledge	\$25.00
08.26.06	Recurring Monthly Donors				Payment on Pledge	\$25.00
09.26.06	Recurring Monthly Donors				Payment on Pledge	\$25.00
05.26.06	Recurring Monthly Donors				Pledge Recurring	\$25.00
	Total For:					\$470.00
	Capital campaign ask, visit					
01.02.06	Aaron Chumrau	116 Cardinal Street	Capital campaign ask, visit		Payment on Pledge	\$150.00
01.02.06	Aaron Chumrau	116 Cardinal Street	Capital campaign ask, visit		Pledge Building Fund	\$500.00
07.02.05	Frank Gonzalez	348 Erie Street	Capital campaign ask, visit		Capital campaign	\$1000.00
	Total For: Capital Campaign Ask, Visit					\$1650.00

Solicitor report

Description: Lists people who have solicited payments, provides subtotal and total amounts (for example a sales person, or person who made a donation “pitch.”).

The data entry field “solicitor” is found on payment screens.

Report format: List/Summary

Report runs in: ebase

Default report header: **Solicitor report**

Report field list:

- Amount
- CodeTitle
- ContactName
- DatePosted
- SolicitorName
- SumAmount

Solicitor report**TOTAL: \$8770.00**

Total: \$8770.00				
DONOR NAME	AMOUNT	DATEPOSTED	CODE/TITLE	SOLICITOR
Einer Horvath	\$25.00	4/15/04	Mbr payment, associate	
Hugh La Fromboise	\$25.00	4/15/04	Mbr payment, associate	
Georgia Milburn	\$25.00	11/15/04	Mbr payment, associate	
Harold de Blanc	\$25.00	11/15/04	Mbr payment, associate	
Ludwig Graf	\$25.00	11/15/04	Mbr payment, associate	
Randolph Holmes	\$25.00	11/15/04	Mbr payment, associate	
Lisa Rock	\$25.00	11/15/04	Mbr payment, associate	
Paul Flannery	\$25.00	11/15/04	Mbr payment, associate	
Nora Goode	\$25.00	11/15/04	Mbr payment, associate	
Ornetta Johnson	\$25.00	11/15/04	Mbr payment, associate	
Homer Lowney	\$25.00	11/15/04	Mbr payment, associate	
Peggy Zahavi	\$25.00	11/15/04	Mbr payment, associate	
Dea McDiarmid	\$250.00	11/15/04	Mbr payment, champion	
Berta Revueltas	\$60.00	11/15/04	Mbr payment, partner	
Heather Swansea	\$60.00	11/15/04	Mbr payment, partner	
Jon Tso	\$60.00	11/15/04	Mbr payment, partner	

Tips on using the Solicitor report

The report will find any records you specify, then sort the payments by solicitor name. Any that do not have a solicitor will move TO THE TOP of the screen. You will notice that the "SolicitorName" field is blank for these records.

SYBUNT List

Description: List of donors who gave a gift in the past, but not during the date range specified.

Report format: List

Report runs in: ebase

Default report header: Gave Some Year But Not This Year

Report field list:

- ContactBy
- ContactName
- LastPaymentDate
- LastPostedPayment\$
- PCLContactAddressFull
- PCLEmail
- PCLPhone

Your Organization's Name Here
Gave before 1/1/2006 but not 1/1/2006-12/31/2006

Name, Address	Primary Phone, Email	ContactBy	Last Payment	Mbrshp Expires
Randolph Holmes 128 Aster Street Atlanta, GA 30328	(222) 1434567 rholmes@xyz.net	email	\$25.00 11/15/2005	11/15/2006
Dea McDiarmid 129 Condor Street Anchorage, AK 99501	(222) 2434567 dmcdiarmid@xyz.net	phone	\$25.00 11/15/2005	11/15/2006
Lisa Rock 330 Quail Street Albuquerque, NM 87195	(222) 3434567 lrock@xyz.net	mail	\$25.00 11/15/2005	11/15/2006
Jon Tso 331 Oriole Avenue Walla Walla, WA 99362	(222) 4434567 jtso@xyz.net	email	\$50.00 11/15/2005	11/15/2006
Michael Tung 332 Poppy Street Binghamton, NY 13905	(222) 5434567 mtung@xyz.net	phone	\$50.00 11/15/2005	11/15/2006

LEGACY REPORTS

ContactsAll.csv

Description: Standard export fields for merge/spreadsheets. These are the same fields used in the ebase Word and Excel report templates available in the ebase community in the Software section under "Report templates".

Report format: Merge file (.mer -- CSV w/headers)

Report runs in: Any application that can accept .mer data format, e.g. Microsoft Word

Report field list:

- CongressDistrictUS(Text)
- ContactName(Text)
- ContactRecordType(Text)
- DateOfBirth(Date)
- GreetingPreferred(Text)
- GroupLableLine1(Text)
- GroupLableLine2(Text)
- HouseDistrictSTATE(Text)
- NameFirst(Text)
- NameLast(Text)
- NameMiddle(Text)
- NameNickname(Text)

- NamePrefix(Text)
- NameSalutation(Calculation)
- NameSuffix(Text)
- NationalID(Text)
- Occupation(Text)
- OtherID(Text)
- Owner(Text)
- Party(Text)
- PCLNameAddressLines(Calculation)
- PCLAddline1(Calculation)
- PCLAddline2(Calculation)
- PCLAddressLabel(Calculation)
- PCLCity(Calculation)
- PCLCityline(Calculation)
- PCLCountry(Calculation)
- PCLContactNames(Calculation)
- PCLEmail(Calculation)
- PCLOrg(Calculation)
- PCLOrgDept(Calculation)
- PCLOrgOffice(Calculation)
- PCLPhone(Calculation)
- PCLShortInfo(Calculation)
- PCLState(Calculation)
- PCLZip(Calculation)
- PCLZip4(Calculation)
- PCL_kUniqueCode(Calculation)
- PCL_AddressLines2on!(Calculation)
- PhoneMobile(Text)
- PhonePager(Text)
- PrecinctCounty(Text)
- ProfileNote(Text)
- SenateDistrictSTATE(Text)
- Source(Text)
- URL(Text)
- _ccLastPledgeAmtFlag(Calculation)

- _ccLastPledgeDateFlag(Calculation)
- _ccLinkCount(Calculation)
- _ccNameLine(Calculation)
- _ccNameLineFull(Calculation)
- _ccNameSorter(Calculation)
- _kContactID(Text)
- _kLastMemExpireDate(Calculation)

ContactsAll.htm

Description: Standard export fields for merge / Word. Uses the existing Find in Contacts to export the standard export fields for merge / Word from Contacts. Use where one line per Contact is needed.

Report format: Merge file

Report runs in: Any application that can accept .mer data format

e.g. Microsoft Word

Report field list

- CongressDistrictUS(Text)
- ContactName(Text)
- ContactRecordType(Text)
- DateOfBirth(Date)
- GreetingPreferred(Text)
- GroupLableLine1(Text)
- GroupLableLine2(Text)
- HouseDistrictSTATE(Text)
- NameFirst(Text)
- NameLast(Text)
- NameMiddle(Text)
- NameNickname(Text)
- NamePrefix(Text)
- NameSalutation(Calculation)
- NameSuffix(Text)
- NationalID(Text)
- Occupation(Text)
- OtherID(Text)
- Owner(Text)
- Party(Text)
- PCLNameAddressLines(Calculation)
- PCLAddline1(Calculation)

- PCLAddline2(Calculation)
- PCLAddressLabel(Calculation)
- PCLCity(Calculation)
- PCLCityline(Calculation)
- PCLCountry(Calculation)
- PCLContactNames(Calculation)
- PCLEmail(Calculation)
- PCLOrg(Calculation)
- PCLOrgDept(Calculation)
- PCLOrgOffice(Calculation)
- PCLPhone(Calculation)
- PCLShortInfo(Calculation)
- PCLState(Calculation)
- PCLZip(Calculation)
- PCLZip4(Calculation)
- PCL_kUniqueCode(Calculation)
- PCL_AddressLines2on!(Calculation)
- PhoneMobile(Text)
- PhonePager(Text)
- PrecinctCounty(Text)
- ProfileNote(Text)
- SenateDistrictSTATE(Text)
- Source(Text)
- URL(Text)
- _ccLastPledgeAmtFlag(Calculation)
- _ccLastPledgeDateFlag(Calculation)
- _ccLinkCount(Calculation)
- _ccNameLine(Calculation)
- _ccNameLineFull(Calculation)
- _ccNameSorter(Calculation)
- _kContactID(Text)
- _kLastMemExpireDate(Calculation)

LogAll.csv

Report format: Merge file (.mer -- CSV w/headers)

Report runs in: -

Default report header:

Description: Standard export fields for merge or spreadsheet use. Uses the existing Find to export related log items. The standard export fields for merge/excel from Contacts. Use where one line per Contact is needed

Report field list:

- ConID>_ccNameSorter(Calculation)
- ConID>ContactName(Text)
- ConID>ContactRecordType(Text)
- ConID>NameFirst(Text)
- ConID>NameLast(Text)
- ConID>NameMiddle(Text)
- ConID>NameNickname(Text)
- ConID>NamePrefix(Text)
- ConID>NameSuffix(Text)
- ConID>PCLAddline1(Calculation)
- ConID>PCLAddline2(Calculation)
- ConID>PCLAddressLabel(Calculation)
- ConID>PCLCity(Calculation)
- ConID>PCLCountry(Calculation)
- ConID>PCLOrg(Calculation)
- ConID>PCLOrgDept(Calculation)
- ConID>PCLOrgOffice(Calculation)
- ConID>PCLPhone(Calculation)
- ConID>PCLShortInfo(Calculation)
- ConID>PCLState(Calculation)
- ConID>PCLZip(Calculation)
- ConID>PCLZip4(Calculation)
- ConID>PCL_AddressLines2on!(Calculation)
- ConID>PhoneMobile(Text)
- ConID>PhonePager(Text)
- AddBy(Text)
- AddTime(Time)
- Bucket1(Text)
- Bucket2(Text)
- Bucket3(Text)
- Bucket4(Text)
- Bucket5(Text)
- Bucket6(Text)

- Bucket7(Text)
- Bucket8(Text)
- CheckNumber(Text)
- SoftCreditName(Text)
- CreditToFY(Text)
- Date1(Date)
- Date2(Date)
- Date3(Date)
- Date4(Date)
- Date5(Date)
- Date6(Date)
- DateLastInvoice(Date)
- DateNextInvoice(Date)
- DatePosted(Date)
- DateStart(Date)
- DateTarget(Date)
- FiscalYear(Text)
- ForPledge(Text)
- ForSolicitationID(Text)
- GracePeriod(Number)
- EntryAmount(Number)
- Member Type(Text)
- ModBy(Text)
- ModDate(Date)
- ModTime(Time)
- PaymentAuthBy(Text)
- PaymentAuthCode(Text)
- PaymentMethod(Text)
- PledgeEntryCodeID(Text)
- PledgeNumberOfPayments(Number)
- _cnSolicitationCost(Calculation)
- _cnSolicitationPlannedCostPer(Calculation)
- _cnSolicitationPlannedCostPerCopy(Calculation)
- _cnSolicitationPlannedQuantity(Calculation)
- SolicitationTitle(Text)

- _kContactID(Text)
- _kAssignedTo(Text)
- _kAssignedToAndDateEnd(Calculation)
- _kSolicitByID(Text)

LogAll.htm

Report format: Merge file (.mer -- CSV w/headers)

Report runs in: Data export

Description: Standard export fields for merge/word. Uses the existing Find to export related log items. the standard export fields for merge/word from Contacts. Use where one line per Contact is needed.

Report field list: Export Order:

- ConID>_ccNameSorter(Calculation)
- ConID>ContactName(Text)
- ConID>ContactRecordType(Text)
- ConID>NameFirst(Text)
- ConID>NameLast(Text)
- ConID>NameMiddle(Text)
- ConID>NameNickname(Text)
- ConID>NamePrefix(Text)
- ConID>NameSuffix(Text)
- ConID>PCLAddline1(Calculation)
- ConID>PCLAddline2(Calculation)
- ConID>PCLAddressLabel(Calculation)
- ConID>PCLCity(Calculation)
- ConID>PCLCountry(Calculation)
- ConID>PCLOrg(Calculation)
- ConID>PCLOrgDept(Calculation)
- ConID>PCLOrgOffice(Calculation)
- ConID>PCLPhone(Calculation)
- ConID>PCLShortInfo(Calculation)
- ConID>PCLState(Calculation)
- ConID>PCLZip(Calculation)
- ConID>PCLZip4(Calculation)
- ConID>PCL_AddressLines2on!(Calculation)
- ConID>PhoneMobile(Text)
- ConID>PhonePager(Text)
- AddBy(Text)

- AddTime(Time)
- Bucket1(Text)
- Bucket2(Text)
- Bucket3(Text)
- Bucket4(Text)
- Bucket5(Text)
- Bucket6(Text)
- Bucket7(Text)
- Bucket8(Text)
- CheckNumber(Text)
- SoftCreditName(Text)
- CreditToFY(Text)
- Date1(Date)
- Date2(Date)
- Date3(Date)
- Date4(Date)
- Date5(Date)
- Date6(Date)
- DateLastInvoice(Date)
- DateNextInvoice(Date)
- DatePosted(Date)
- DateStart(Date)
- DateTarget(Date)
- FiscalYear(Text)
- ForPledge(Text)
- ForSolicitationID(Text)
- GracePeriod(Number)
- EntryAmount(Number)
- Member Type(Text)
- ModBy(Text)
- ModDate(Date)
- ModTime(Time)
- PaymentAuthBy(Text)
- PaymentAuthCode(Text)
- PaymentMethod(Text)

- PledgeEntryCodeID(Text)
- PledgeNumberOfPayments(Number)
- _cnSolicitationCost(Calculation)
- _cnSolicitationPlannedCostPer(Calculation)
- _cnSolicitationPlannedCostPer Copy(Calculation)
- _cnSolicitationPlannedQuantity(Calculation)
- SolicitationTitle(Text)
- _kContactID(Text)
- _kAssignedTo(Text)
- _kAssignedToAndDateEnd(Calculation)
- _kSolicitByID(Text)

SPECIAL USE REPORTS

Codes Report

Description: Prints a list of all of the codes in your copy of ebasePro

Report format: List, print-only

Report runs in: ebase

Report field list:

- Bucket1
- Bucket2
- Bucket3
- Bucket4
- Bucket5
- Bucket6
- Bucket7
- Bucket8
- CodeDescription
- CodeEntryType
- CostCopy
- CostDesign
- CostList
- CostOther
- CostPostage
- CostPrinting
- EditWithLayout
- EmailBodyText (same as receipt text)

- EmailSubject
- Meta_No
- Meta_Yes
- ModuleName
- ModuleParameter
- PlannedMailDate
- PlannedQuantity
- SolicitationText
- UnsubscribeMatch
- UseAsnondeductablePayment
- UseInInterestList
- UseInPledgeLookup
- UseInPublicHistoryView
- UseInReceipt
- UseInSolicitationsLookup
- ViewWithLayout_
- _ccCode
- _fEmail
- _fExportToWeb
- _fLegacyCode
- _fMemberPayment_UseAsMembershipPayment
- _fModuleAccess
- _kCodeTitle
- _kCodeID

Codes Report 9/10/2006

Title Activist available anytime	CodeID: YH0ETUU7																																				
Description Activist available anytime	Edit Layout <input type="button" value="Note Edit; 9"/> View Layout <input type="button" value="Note Edit; 9"/> Email code? <input type="button"/>																																				
Class Availability	Actual Code: Availability Advocacy All Activist Anytime																																				
Owner Advocacy	Meta YES =																																				
Project All	Meta NO =																																				
List/Proj Activist																																					
Type/Vers																																					
Method/SubT																																					
Time/Campaign Anytime																																					
Legacy																																					
<hr/>																																					
<table border="0"> <tr> <td>A) INTERFACE</td> <td>Skip details on entry <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Hide in Public history <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Display Metadata Flag <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Show Log Entry description in Overview <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Legacy code (Retire from use) <input type="checkbox"/></td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td>B) PAYMENT/PLEDGE MANAGEMENT</td> <td>Member /Recur payment <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Non-Deductable Payment <input type="checkbox"/></td> </tr> <tr> <td></td> <td>View in Pledge list <input type="checkbox"/></td> </tr> <tr> <td>Receipt Text</td> <td>Receipt template? <input type="checkbox"/></td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td>C) SOLICITATION MANAGEMENT</td> <td>View In Solicitation List <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Unique Code: <input type="text"/></td> </tr> <tr> <td colspan="2">Planned Costs for Solicitation</td> </tr> <tr> <td>Copy <input type="text"/></td> <td>List <input type="text"/></td> </tr> <tr> <td>Design <input type="text"/></td> <td>Postage <input type="text"/></td> </tr> <tr> <td>Printing <input type="text"/></td> <td>Other <input type="text"/></td> </tr> <tr> <td>Mail Date <input type="text"/></td> <td>Mail Qty <input type="text"/></td> </tr> </table>		A) INTERFACE	Skip details on entry <input type="checkbox"/>		Hide in Public history <input type="checkbox"/>		Display Metadata Flag <input type="checkbox"/>		Show Log Entry description in Overview <input type="checkbox"/>		Legacy code (Retire from use) <input type="checkbox"/>	 		B) PAYMENT/PLEDGE MANAGEMENT	Member /Recur payment <input type="checkbox"/>		Non-Deductable Payment <input type="checkbox"/>		View in Pledge list <input type="checkbox"/>	Receipt Text	Receipt template? <input type="checkbox"/>	 		C) SOLICITATION MANAGEMENT	View In Solicitation List <input type="checkbox"/>		Unique Code: <input type="text"/>	Planned Costs for Solicitation		Copy <input type="text"/>	List <input type="text"/>	Design <input type="text"/>	Postage <input type="text"/>	Printing <input type="text"/>	Other <input type="text"/>	Mail Date <input type="text"/>	Mail Qty <input type="text"/>
A) INTERFACE	Skip details on entry <input type="checkbox"/>																																				
	Hide in Public history <input type="checkbox"/>																																				
	Display Metadata Flag <input type="checkbox"/>																																				
	Show Log Entry description in Overview <input type="checkbox"/>																																				
	Legacy code (Retire from use) <input type="checkbox"/>																																				
B) PAYMENT/PLEDGE MANAGEMENT	Member /Recur payment <input type="checkbox"/>																																				
	Non-Deductable Payment <input type="checkbox"/>																																				
	View in Pledge list <input type="checkbox"/>																																				
Receipt Text	Receipt template? <input type="checkbox"/>																																				
C) SOLICITATION MANAGEMENT	View In Solicitation List <input type="checkbox"/>																																				
	Unique Code: <input type="text"/>																																				
Planned Costs for Solicitation																																					
Copy <input type="text"/>	List <input type="text"/>																																				
Design <input type="text"/>	Postage <input type="text"/>																																				
Printing <input type="text"/>	Other <input type="text"/>																																				
Mail Date <input type="text"/>	Mail Qty <input type="text"/>																																				
<table border="0"> <tr> <td>D) SYNCHRONIZE WITH EBASE-COML</td> <td>ExportToWeb <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Display on Web profile lists? <input type="checkbox"/></td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td>E) EMAIL MANAGEMENT</td> <td>Match to Unsubscribe CodeID: <input type="text"/></td> </tr> <tr> <td></td> <td>Recurring message? <input type="checkbox"/></td> </tr> <tr> <td>Email Text:</td> <td><input type="text"/></td> </tr> </table>		D) SYNCHRONIZE WITH EBASE-COML	ExportToWeb <input type="checkbox"/>		Display on Web profile lists? <input type="checkbox"/>	 		E) EMAIL MANAGEMENT	Match to Unsubscribe CodeID: <input type="text"/>		Recurring message? <input type="checkbox"/>	Email Text:	<input type="text"/>																								
D) SYNCHRONIZE WITH EBASE-COML	ExportToWeb <input type="checkbox"/>																																				
	Display on Web profile lists? <input type="checkbox"/>																																				
E) EMAIL MANAGEMENT	Match to Unsubscribe CodeID: <input type="text"/>																																				
	Recurring message? <input type="checkbox"/>																																				
Email Text:	<input type="text"/>																																				
<table border="0"> <tr> <td>F) MODULE</td> <td>Access With Module <input type="checkbox"/></td> </tr> <tr> <td>Name <input type="text"/></td> <td>Parameter <input type="text"/></td> </tr> </table>		F) MODULE	Access With Module <input type="checkbox"/>	Name <input type="text"/>	Parameter <input type="text"/>																																
F) MODULE	Access With Module <input type="checkbox"/>																																				
Name <input type="text"/>	Parameter <input type="text"/>																																				

Email Bounce Report

Description: Report that creates an interactive list of contacts whose email addresses are bouncing. This report recalculates the number of email bounces accumulated by a contact, then asks the user to determine the number of bounces they want to search for (in many cases

bounce messages may be transient messages and it may be better policy to search for contacts who have accumulated 2- 3 or more bounces before deleting them or researching their email addresses).

Uses CONTACTS>List to report the contacts matching the number of bounces entered by the user.

Report format: **ebase**

Report runs in: **ebase**

Default report header: **Contacts with bouncing email**

Report field list

- ContactName
- PCLAddress
- PCLEmail

Tips on using the Email Bounce Report report

This report is provided because ebase can't determine the difference between a "transient" email bounce and a "hard" email bounce. The report uses the premise that if you send three emails to a user in a month (or two or three) and all of them bounce then the email address is bad (as opposed to their ISP, DNS record, or network connection being bad).

If you have a lot of bounces and contacts be prepared for a long wait while FileMaker recalculates the number of bounces each contact has.

Export for Enhanced Data- LCV

Description: Export data format for use for League of Conservation Voters enhancement projects and other list enhancement projects.

Report format: **Merge file (.mer = CSV w/headers)**

Report runs in: **Export**

Report field list:

- Exportdate
- Sourceid
- Sourceid2
- Firstname
- Middlename
- Lastname
- Sfxname
- Address1
- Address2
- City
- State
- Zipcode
- Zip4
- Country
- Areacode

- Phone
- Email
- County
- Locationname
- Locationid
- Contactlocationid

Update Seasonal Address

This is NOT a report, it is a maintenance script that looks for the addresses with seasonal data and updates them.

This script updates the current Primary Contact Location records for all of your Contacts based on data you may have entered in the “Valid Dates” fields. Use only if you use ebase seasonal addressing functions.

It is included here to make updating seasonal addresses easier to do just before running labels, etc.

Omit Location Dups

This is NOT a report, it is the same function as is found under CONTACTS>Tools>Dup Check>Omit Location Dups.

This function is primarily used when doing something like printing labels – it omits from the current found set the contacts that share a location (with family and organizations contacts remaining over individuals) leaving one contact per shared address.

Chapter 12 Import Tools.....	1
two Notes on the Import Chapter.....	1
Import Menu.....	2
Import Data Menu	2
Import from Ebase v1.....	3
Which Version?	3
Import Which Files?.....	4
Import Which Records?.....	4
Use Standard Field Mappings?.....	4
Default Bucket 3 Value.....	5
Source Codes.....	5
Translate Source Codes	5
Ready to Extract Data	6
Where Do ebase v1 Fields Go in ebasePro?	7
Customized Versions of Ebase v1: Issues for Import	8
Import External Data	9
Import External Data - Choose Import Tool	9
External Import Wizard Capabilities: Overview	10
External Import Wizard - Step 1: Choose Configuration/Mode.....	10
External Import Wizard - Step 2: Extract Source Data.....	11
External Import Wizard - Step 3: Import What Types of Records?	12
External Import Wizard - Step 4: Phone/Fax/Email Settings	13
External Import Wizard - Step 5: Map LOGFIELDS.....	13
External Import Wizard - Step 6: Define Entry Codes.....	14
External Import Wizard - Step 7: Save Configuration	16
External Import Wizard - Step 8: Ready to Preview.....	16
External Import Wizard - Field Details - Address Fields	16
External Import Wizard - Field Details - Email/Phone/Fax/URL.....	17
External Import Wizard - Field Details - LOGFIELDS	18
External Import Wizard - Field Details - Name Fields	20
External Import Wizard - Field Details - ID Fields	20
External Import Wizard - Field Details - Profile Note	21
External Import Wizard - Field Details - Complete Field List	21
External Import Wizard - Tips for Extracting Source Data	24
Import External Data--How LOGFIELD Mapping Works.....	24
Preview Records in Preview Area.....	26
Preview Area: Overview	27
Move Data to ebase: Overview	27
Dupcheck Options	28
Review Duplicate Contact Records - ebase.....	29
Review Duplicate Contact Records - Preview Area.....	29
Review Unlinked Log Entries	30
Re-Import.....	30
Clear Preview Area	31
Import leaf data	31

Chapter 12 Import Tools

TWO NOTES ON THE IMPORT CHAPTER

Much of the Import chapter is step-by-step instructions for importing files from ebase v1 or from another external database into ebase 2.xx. It may be helpful to skim this chapter and do the data fields mapping method described in this chapter before you start your import.

It is highly advisable to have a basic knowledge of log codes before you do your import. You may import contact information without using the added features of ebase but ebase's full power comes with taking other information about your history and relationship with the contact and putting it into the log section as *part of* the import process.

IMPORT MENU

The following options are available from the Import Menu.

IMPORT DATA

Options to import contact and log data from various sources.

IMPORT LEAF DATA

Import data from an enhanced data file in List Enhancement Access Format (LEAF). Primarily intended for voter data from your League of Conservation Voters Education Fund affiliate.

OMIT LOCATION DUPS

Omits from the found set in Contacts.200 records that have duplicate locations.

IMPORT DATA MENU

The following options are available from the Import Data Menu.

IMPORT FROM EBASE V1

Extract records from ebase v1 (versions 1.02 or 1.03) into the Preview Area.

IMPORT EXTERNAL DATA

Import data from any data source using one of three available External Import Tools, each of which can be configured to extract data from a source file of a particular format into the Preview Area.

PREVIEW RECORDS

View records that have already been imported into the Preview Area, and make any necessary changes before moving the data into ebase. You may view contact, location, log history, log detail and entry codes in the preview area.

MOVE DATA TO EBASE

Import all records from the Preview Area to ebase.

RE-IMPORT

Go back to External Import Wizard and change your mappings, the re-import the data to the Preview Area.

CLEAR PREVIEW AREA

Deletes all data from the preview area.

IMPORT FROM EBASE V1

CAUTION: It is best to have a well-planned and comprehensive code set in place in ebase 2.x before importing data from v1. If you have not yet devised a code set, you may wish to do so before attempting to map your v1 Source Codes. If you want to change the code set after importing v1 data, you may end up losing some important information.

The ebase v1 Import Tool automates the process of importing data from ebase v1. It runs a Wizard that guides you through all of the essential decisions in importing v1 data.

All related records (Payments, Pledges, Actions, Notes, Contacts and Source Codes) are translated to v2 log entries. Households and 2-name records become v2 Family records. Many other transformations are handled automatically as well.

To prepare for import, move a copy of all ebase v1 files to the ImportData folder inside your ebase folder.

When importing from ebase v1, keep the following points in mind:

- Only versions 1.03 and 1.02 are supported. All files must be in FileMaker 5 format.
- The v1 Import Tool only imports standard Ebase v1 fields. If you have customized your copy of ebase v1, you may need to use the External Import Tool to import all of your data. See help topic "Customized Versions of ebase v1"

Steps:

1. Click on IMPORT/EXPORT>Import Data>Import from Ebase v1.

Which Version?

Note that only v1.03 and v1.02 are supported. If you are using v1.00 under FileMaker Pro or the ebase Runtime, you will need to convert the files first to FileMaker Pro 5 format using FileMaker Pro 5 or 5.5. (See FileMaker documentation on this: make sure that the converted files have the same names as the original files.)

If you are using ebase v1.00 (or v1.02 as a Runtime and don't have FileMaker Pro 5), you have a couple of options. You can first import your data to ebase v1.03 using the Import Tool provided there for that purpose, and then from v1.03 to ebase 2.x. Or you can use the External Import Tool to import from text files that you export from ebase v1. The former method is recommended over the latter.

In the first step, place your files must be in the subfolder "ImportData" of the ebase 2.x folder. This folder is automatically installed along with your files when you install ebase 2.x. The exact path to the ImportData folder will vary depending on where you install ebase. Make sure that the ebase v1 files are in the top level of the ImportData folder (not inside another folder inside that folder).

Now, you must tell the Wizard which version of ebase v1 you will be importing from.

When you click "Next", the Wizard will attempt to open your ebase files, and you may be asked to enter your ebase v1 password. Any password will do - it doesn't need to be the Full Access password.

NOTE: Your use of the Wizard will vary if you have customized your copy of ebase v1. See topic in this chapter "Customized Versions of ebase v1: Issues for Import" for a full discussion.

NOTE: The ebase v1 Wizard makes use of the clipboard. Please ensure that you do not perform any cut or paste operations while the Wizard is running, and check before beginning to make sure that there is nothing you need in the clipboard - whatever is currently in the clipboard will be erased.

Steps:

2. Choose an Ebase v1 Version.
3. "Next"

Import Which Files?

Indicate which related records in ebase v1 you want to import.

Most of the time, you will want to import all records to ebase 2.x. However, you may choose not to import one or more related files if you decide that the data it contains is not relevant for your ebase 2.x database.

Note that Source Codes are handled in a later step. Also note that Contacts (along with several fields in Profile) are always imported when you use this Wizard.

You will be able to choose in a later step whether to import all records or only currently found records from each file.

Steps:

4. Check each Ebase v1 file that you want to import.
5. "Next"

Import Which Records?

Indicate whether to import all records or only those in the current found set in each ebase v1 file (including Names/Profile, but not including Source Codes). Most of the time, you will want to import all records to ebase 2.x. However, you may choose not to import some records if you decide that the data is not relevant for your ebase 2.x database.

Steps:

6. Make a selection
7. "Next"

Use Standard Field Mappings?

Indicate whether the Wizard should use the standard field mappings for extracting data from ebase v1, or let you adjust the mappings. If you select "No", you will not see the mapping dialogs until the end of the Wizard, when data is extracted from ebase v1.

If you have not customized your copy of ebase v1, you should be able to use the standard mappings. However, if you have customized ebase v1, especially if you have deleted or added fields, you should choose "No" and verify that the fields still map correctly. See the section "Customized Versions of ebase v1" for more info on importing from a customized copy.

NOTE: This setting applies to all v1 files.

See FileMaker Pro Help for more information about mapping fields during import.

Steps:

8. Make a selection

Default Bucket 3 Value

ebase 1 codes have two mandatory Buckets, ebase 2.0 – 2.11 codes have three mandatory Buckets and ebase 2.20+ have only one. When you import codes from ebase 1.x to ebase 2 you may need to establish a value for Bucket 3. Enter a default value for Bucket 3 if you want the Import Tool to use this value for all Entry Codes it creates. If you do not enter a value, Bucket 3 will be left empty for all Entry Codes. You will have to enter the Bucket 3 values for these codes later, if you chose not to use default values.

See the Log Entries chapter in the Admin Manual for general information about Entry Codes and Buckets.

Steps:

9. Enter a value for Bucket 3, if desired

Source Codes

Choose whether or not to extract and import Source Codes from ebase v1.

If you choose "Yes", you will be asked to configure the tool so it can transform the Source Codes to Entry Codes in ebase 2.x. Payment, pledge, and action entries will be linked to this Code (via the "From Solicitation" field) as they were to the Source Code in ebase v1. Contact records, on the other hand, will become an instance of this entry, rather than a separate Contact entry containing a reference to it.

If you choose "No", Source Codes will not be extracted, and all links to Source Code in payment, pledge, etc. records will not be import to ebase 2.x.

Steps:

10. Make a selection
11. "Next"

TRANSLATE SOURCE CODES

The settings on this screen let you to specify how the Import from ebase v1 Wizard should translate Source Codes into v2 Entry Codes. You specify where each part of the v1 Source Code should be mapped to in the v2 Entry Code, and the Wizard will apply your mappings as it creates a unique Entry Code from each Source Code in your ebase v1 database.

MAP V1 'BUCKETS'

In ebase v1, each Source Code was made up of 6 parts, which we will call Buckets. Each v1 Bucket is made up of a short code (usually 1-2 characters) and a description of that code. You can map each v1 Bucket (or the Bucket's description) to a v2 Entry Code Bucket (#2-8), or you can map the entire v1 Source Code to a single v2 Bucket.

SET V2 DEFAULT BUCKET VALUES

You can also set a default value for each v2 Bucket. If you don't map a v1 Bucket to that v2 Bucket, each source code will use the default value for that Bucket. If you do map a v1 Bucket to it, the default value will be ignored.

You cannot map a v1 Bucket to v2 Bucket 1 (Class). This Bucket must be given a default value. Often this will either be "Solicitation" or "Communication", but may vary depending on your entry code scheme.

As you set your mappings in the upper half of the screen, the lower half will display a preview of how each source code will be transformed. Click "Back" and "Next" in the lower right of the screen to cycle through the Source Codes.

Click "Next" when you have completed your mappings.

CAUTION: It is best to have a well-planned and comprehensive Code set in place in ebase 2.x before importing data from v1. If you have not yet devised a code set, you may wish to do so before attempting to map your v1 Source Codes. If you want to change the code set after importing v1 data, you may end up losing some important information.

See documentation on Entry Codes for more information.

NOTE: The Wizard contains default mappings. You can return to these settings by clicking "Revert to Defaults". The default settings map the entire v1 Source Code to Bucket 8, and use default values for Buckets 1, 2 and 3. For example, if your v1 Source Code is C1A0201DLT, this would map to:

Communication|All|Legacy||||C1A0201DLT. You may wish to use these default mappings if your v2 entry code scheme is not complete.

Steps:

MAP V1 BUCKETS

For each V1 Bucket:

12. Choose a v2 Bucket Number (2-8) to map to or choose "none" to not translate or import.
13. If mapped, choose "Code" or "Description" to indicate what data should be used for the v2 Bucket. Or choose "Entire Code" to use the entire v1 Source Code as the value of the v2 Bucket. (This should only be used for one v2 Bucket.)

SET V2 DEFAULT BUCKET VALUES

For each v2 Bucket:

14. Choose a default value if you have not already mapped a v1 Bucket to this Bucket, or leave blank for no default value. Bucket 1 must have a default value.
15. Click "Next" when done.

Ready to Extract Data

You have completed your settings for the Import from ebase v1 Wizard. Click "Finish" to extract data from ebase v1 and move records to the Preview Area.

As part of this process, the Wizard will:

- Extract data from all v1 files you have selected
- Transform data to v2 fields and formats
- Create Log Entries and Codes for all related records (payments, pledges, etc.)

- Create Log Entries from several fields in Names/Profile that have no equivalent in Contacts in v2

NOTE: The extraction and translation process is complex and may take considerable time. The larger your v1 database, the longer it will take. The process will be completed more quickly if you first close any other programs on your computer and keep ebase in the foreground as the procedure runs.

The screen may go blank or flicker during the extraction/transformation process. This is not an indication of a problem. Do not interrupt the process unless you are sure your computer has frozen (cannot move mouse) and all disk activity stops for a long period of time.

Steps:

16. Click "Finish" to begin extraction and transformation of ebase v1 data.

Where Do ebase v1 Fields Go in ebasePro?

The v1 import wizard extracts data from your ebase v1 database and imports it into ebase 2.x. As part of this process, fields and records from v1 are transformed to fit the structure of v2. What follows is a quick overview of which fields end up where.

- Calculations, Summaries, Fast Find fields
- These are not imported.
- Fields in Names / Profile
- Most of have an equivalent field in Contacts, ContactLocations, or Locations. Those that do not have an equivalent either become a Log Entry (see below) or are not imported.

NOTE: If you import a Organization record that also contains a First and/or Last Name, that name will currently be imported as a notation in Profile Note. Future version may contain the option to trigger creation of a separate linked Individual record with that name.

- Related Records (Payments, Pledges, Actions, Notes, Contacts)
- These records become Log Entries in v2, with an automatically-generated legacy entry code.

NOTE: You can change this entry code after importing to v2 - just remember to run the Admin>Maintenance Scripts>Fix Log Codes script to update attached Log Entries after changing the code.

- Source Codes (Solicit file)
- Unless you chose not to import Source Codes, these will become Entry Codes according to the mappings you provide in the wizard.
- Names - fields that become Log Entries
- The following fields from the Names (and Profile) file in v1 become Log Entries in v2:

BIO: AFFILIATIONS

BIO: PHONE SURVEY Q1

BIO: COLLEGE NAME

BIO: PHONE SURVEY Q2

BIO: COMPUTER?

BIO: PHONE SURVEY Q3

BIO: HOBBIES

BIO: PHONE SURVEY Q4

BIO: PHONE SURVEY CALLSTATUS

BIO: PHONE SURVEY Q5

BIO: PHONE SURVEY Q6	USER FIELD 1
CONTACT:ALERTS	USER FIELD 10
CONTACT:ANNRPT	USER FIELD 2
CONTACT:ANON	USER FIELD 3
CONTACT:CALLS	USER FIELD 4
CONTACT:EACTIVIST	USER FIELD 5
CONTACT:EMAIL	USER FIELD 6
CONTACT:FAX	USER FIELD 7
CONTACT:NEWSLETTER	USER FIELD 8
CONTACT:RENEWALS	USER FIELD 9
CONTACT:SOLICIT	VOL: ACTION PREFERENCE
CONTACT:TRADE	VOL: ACTIVIST
CONTACT:VISIT	VOL: ACTIVIST MEMO
EMAIL LISTS	VOL: EXPERTISE
MEM: DONOR TYPE	VOL: FOCUS
RESEARCH?	VOL: ISSUES1
STATUS	VOL: ISSUES2

Customized Versions of Ebase v1: Issues for Import

If you have customized your copy of ebase v1, this will impact whether and how you can use the ebase v1 Import Wizard to import your data. What your import procedure will be depends on the kind and extent of your customizations. Just about any copy of ebase v1 should be importable, no matter how customized. But the more extensive your customizations are, the more involved the import procedure will be.

Changes to layouts and scripts have no bearing on the import procedure. Only changes to fields need be considered.

- Deleted Fields - If you have deleted fields in ebase v1, you can still use the v1 import Tool, but you will need to alter the default field mappings, or the Tool may import the wrong fields. Choose "No" to Use Default Field Mappings in the v1 import Wizard.
- Added Fields and/or Files - If you have added fields or whole files to ebase v1, you cannot use the v1 Import Tool to extract the custom data. You CAN use it to extract all of the standard ebase v1 files and fields. Then you can use the External Import Tool to extract the customized data, and combine it with the data already extracted.
- Changed Use of Existing Field - The v1 Import Tool assumes you used the fields in ebase v1 for their intended purposes. If you used a field for something other than this purpose, you will want to exclude it from the field mappings in the v1 Import Tool, and import it separately using the External Import Tool.

NOTE: If you have added functionality to ebase v1 in the form of additional files/fields, you may have to build or install one or more modules in ebase 2.x to provide the same functionality. If you do include a module, you may import some data into the module instead of into the core of ebase. You would then do that part of your import "by hand", not using the Import Wizards.

IMPORT EXTERNAL DATA

The Import External Data Wizard is a configurable tool that allows you to extract data from a wide range of possible sources and translate the data into an acceptable format for import into ebase.

Three blank External Import Tools are available, each of which can be configured to extract data from source files of a specified format. The extracted data is then transformed and brought into the Preview Area. Each Tool will remember its configuration so you can use it repeatedly to import data from similarly-formatted source files.

Each External Import Tool can be configured to extract data from a variety of source file types, including but not limited to:

- Other FileMaker Databases (including customized versions of ebase v1)
- Excel spreadsheets
- Tab or comma-delimited text file (including export from database such as MS Access)

Two built in configurations are available, enabling import with a minimum of user effort:

- Microsoft Outlook export file
- Palm address export file

Tip: Create a spreadsheet with your data and give it the exact field names that ebase uses. There is a field name list later in this chapter. This will help you make sure the right information is going to the right field—or help with troubleshooting!

Steps:

1. IMPORT/EXPORT>Import Data>Import External Data.
2. Choose an Import Tool from the Choose Import Tool screen.

Import External Data - Choose Import Tool

Choose which of the three configurable External Import Tools to use to extract data from your source file.

Each tool displays its current configuration name. If the configuration you need is displayed, simply select that tool and use it without making changes to the configuration. If your configuration is not listed, select a tool that is currently "Unconfigured" or that contains a configuration you no longer need.

Each tool will only 'remember' a single configuration, and cannot be reverted to a prior configuration. Once you change the configuration, it's changed permanently. (Unless you go back to a backed-up copy of the file, of course.)

Each tool also contains a number of built-in configurations, to ease import of data from common sources. The currently available built-in configurations are:

- Microsoft Outlook (export file from address book)
- Palm (export file)

Steps:

- 2.1 Navigate to the "On the Import External Data- Choose Import Tool" screen.
(IMPORT/EXPORT>Import>Import External Data)
- 2.2 Click "1" , "2" or "3" to launch the selected Import Tool and begin the Import from External Data Wizard.

External Import Wizard Capabilities: Overview

THE EXTERNAL IMPORT TOOL IS ABLE TO:

- Import Contact/Location and Log data simultaneously from the same source
- Create user-defined Log Entries triggered by one or more source fields
- Create multiple locations by intelligently combining imported location fields
- Import Log Entries and/or Locations and link to existing Contact records in ebase
- Save and reuse import field mappings AND log entry definitions
- Parse names, phone numbers, and addresses (similar to V1 tool)
- Allow preview of data before import to V2, manual find/replace, or re-import after adjustments to mappings
- Map field values to Entry Code buckets

THE EXTERNAL IMPORT TOOL IS NOT ABLE TO:

- Do user-defined transformations of data inside a field (i.e. transform 1 to "Yes" or "1 Jan" to 1/15/2001)
 - Consider more than one source field to determine the value of a single field or bucket
- NOTE:** All of the above issues can be handled either a) by performing necessary transformations in the source database or spreadsheet or b) taking care of it with find/replace in the Preview Area.
- Import linked pledge/payment structures or payment/solicitation structures
 - Create more than 10 log entries with each pass through the External Import Wizard (although more than 10 entries can be stored in the Preview Area before import to ebase.)
 - Import more than 25 fields at a time mapped to Log fields or buckets
 - Update fields in existing Contact, Location, or Log records in ebase

External Import Wizard - Step 1: Choose Configuration/Mode

Choose which mode to run the Wizard in:

- Enter New Configuration -or- Current Configuration / Normal Mode - Allows you to create a custom mapping to transform your source data into ebase 2.x records. If you have already configured this Wizard, it will use the current configurations and settings, but allow you to review and change them (including field mappings) before extracting data.
- Current Configuration/Quick Mode - Uses current configurations and settings, and does not allow you to review or change them. If you choose this option, data extraction and translation will begin as soon as you click "Next". Only use this option if you are absolutely sure that the current configuration is the right one for your source data file.

- Default Configuration - Erases the current configuration (if any) and reverts to a default configuration. You can either choose "Unconfigured", which will give you a blank slate with which to define a new configuration, or one of the built-in configurations. In either case, the Wizard will run in Normal mode, allowing you to enter or edit settings.

The currently available default configurations are:

- Palm Address Book
- Microsoft Outlook Address Book

NOTE: The Wizard makes use of the clipboard. Please ensure that you do not perform any cut or paste operations while the Wizard is running, and check before beginning to make sure that there is nothing you need in the clipboard - whatever is currently in the clipboard will be erased.

Steps:

3. Make a selection
4. "Next"

External Import Wizard - Step 2: Extract Source Data

When you click "Next", the Wizard will display an Open File dialog box. Find your source data file and click "Open".

You will then be presented with an Import Field Mapping dialog. Here you will map fields from your source data file to fields in the Import Tool, which will in turn be used to create v2-format records in the Preview Area. If you chose one of the default configurations (Outlook or Palm) the fields in the data file will be correctly mapped to the fields in the import wizard.

The fields in the Import Tool are divided into 5 basic types:

- Name Fields, divided into Name1 and Name2 (ex: NAME1:First, NAME1:Last)
- Address Contact Info (i.e. mailing address), divided into Address1 and Address2 fields(ex: ADDRESS 2:StreetAddress)
- Non-Address Contact Info, divided into several categories, each of which has multiple fields available:
 - EMAIL
 - PHONE
 - FAX
 - URL
- Bio/Profile fields: general info about the Contact (ex; DATE OF BIRTH, OCCUPATION)
- LOGFIELDS, which are used to create Log Entries. Twenty-five LOGFIELDS are available.

It is very important that you import your data into the correct fields. You can use the Wizard's "Scan Data" feature to preview how your data is mapping (located directly below the left window of the Import Field Mapping dialog box).

Once you have mapped all of your source fields, click "Import" and then "OK" to begin extraction of data.

Tip: create a spreadsheet with your original data and name the columns with ebase field names (see list later in this section). This will greatly ease the mapping process and help with any troubleshooting—if needed!—later on.

Once the data has been extracted, the Wizard will allow you to configure how the data will be transformed for import into the Preview Area (and from there to ebase).

Steps:

5. Click "Next" to begin mapping/extraction.
6. Navigate to your source file and click "Open". (You will first have to choose Files of Type: "All" unless you are importing from a FileMaker Pro file, or your file will not be visible.)
7. Map source data fields (on the left) to Import Tool fields (on the right) by sliding the right-side fields up-and-down by clicking and dragging OR by choosing a method from the drop-down list on top right. Click on the "Map" column between the fields to toggle whether the field will be imported. An arrow means it will be imported, a small zero with a slash through it indicates the field will not be imported.
8. See FileMaker Pro help for more information on this process.
9. Don't change the following setting in the Import Field Mapping dialog:
 - Import Actions (= "Add New Records")
 - Click "Import", then ensure the "Perform Auto-Enter Options" box is checked and click "OK".

External Import Wizard - Step 3: Import What Types of Records?

Indicate whether to import Contacts or Log Entries or both to the Preview Area.

If you select Contacts, each record must contain at least a name. However, not every record may end up being imported to ebase, because checking for duplicates against records already in ebase will happen once records are in the Preview Area.

If you select Log, the Import Tool will create Log Entries from the LOGFIELDS that you populated during extraction. (You will define what these Log Entries will look like in later Wizard steps.) Since Log Entries must be connected to a Contact record in ebase, you must provide the Import Tool with some way to make this connection.

There are three options:

- Import connected Contacts and Log Entries together.
- Import Contacts to the Preview Area and then Import Log Entries (using the "Match to Contact Records in Preview Area" function), then import both together into ebase. To use this method, both the Contacts and the Log Entries must share a common ID code, usually ID:LEGACY (which can be any ID number or code taken from your source data).
- Import Log Entries only, and connect to existing Contact records in ebase (again using an ID code, either ID:LEGACY or ID:Ebasev2)

It is also possible to use a combination of methods 1 and 3. If your source data doesn't contain an ID code that will connect it to an ebase record, but does contain other data that could establish a connection to an ebase record (either name or name and address), you can import both (by selecting both Contacts and Log on this screen).

Then the dupcheck function in the Preview Area is capable of finding matches with ebase records based on name or name/address, and of connecting imported Log Entries to the matched Contacts. Meanwhile the duplicate Contact records will not be imported.

For more info see "Dupcheck Options" in another chapter in this manual.

Steps:

10. Make a selection
11. "Next"

External Import Wizard - Step 4: Phone/Fax/Email Settings

On this screen you indicate the default location name for each Location field (Address1-2, Phone1-4, etc.) In ebase 2.x, all contact information of this sort is part of a location record (*or a ContactLocation record, if we want to be technical*), and each location has a LocationName field. Each Location field in the ImportTool also has a "type" field to go along with it that will indicate the location name. For instance, we have PHONE 1 and PHONE 1 Type as available fields. If the type location/type of PHONE 1 varies in your source data, map a field containing the type/location name to PHONE 1 Type.

The default location/type values for each field will only be used when the corresponding "Type" field has not been mapped to or is empty.

Once each location field has gotten a type/location value, the Import Tool uses these to construct locations for each Contact. For example, if a Contact has Address1 set as "Work", Address2 set as "Home", Email1 set as "Primary", and Phone1 set as "Work", the Contact will end up with two ContactLocation records: one named "Work" containing Address1, Email1, and Phone1, and another named "Home" containing Address2.

Steps:

12. Choose a default location name/type for each field listed (or accept values as given)
13. Click "Next"

External Import Wizard - Step 5: Map LOGFIELDS

For more explanation of how LOGFIELDS work, please see the section on "Import External Data - How LOGFIELD Mapping Works".

On this screen you will tell the Import Wizard how to construct Log Entries from the LOGFIELDS you extracted data into.

The following settings are available:

Logfield #	Sample Data	Entry #	Trigger If...	Data	Target Field
1	20	1	<input checked="" type="checkbox"/> NotEmpty	<input checked="" type="checkbox"/>	ItemAmount
2	5/1/2007		<input type="checkbox"/>	<input checked="" type="checkbox"/>	DatePosted
3	email no	2	<input checked="" type="checkbox"/> NotEmpty	<input checked="" type="checkbox"/>	ItemNote
4			<input type="checkbox"/>	<input type="checkbox"/>	
5			<input type="checkbox"/>	<input type="checkbox"/>	
6			<input type="checkbox"/>	<input type="checkbox"/>	

- Entry #

Choose the entry number each LOGFIELDS refers to. Each LOGFIELDS you use for the same entry should have the same number. You can use LOGFIELDS to create up to ten log entries.

The numbers themselves have no lasting significance. They are there merely to allow you to indicate which LOGFIELDS should be combined to create a single Log Entry.

- Trigger If...

For each numbered Log Entry, you must also designate one (and only one) of the LOGFIELDS as the Trigger field. The Log Entry will be created only for those records that meet the Trigger conditions. To set a LOGFIELD as trigger, select one of the values under "Trigger If...". The values have the following meanings:

- "Not Empty" - Log Entry is created if any data is in this LOGFIELD
- "True" - Log entry is created if any data is in this LOGFIELD except the number 0. (Allows you to use Boolean 1/0 fields to indicate whether to create a Log Entry for a Contact.)

- "Always" - Creates the Log Entry for every record, regardless of the value of the LOGFIELD

- Data Target

Data within LOGFIELDS can be imported to a field in a Log Entry. (For instance, you may have a LOGFIELD that contains donation amounts that you want to import to ebase.) To map a LOGFIELD to a Log Entry field, simply choose the target field from the menu under "Target Field".

While most LOGFIELDS will be mapped to Target Fields, not every LOGFIELD will always be mapped. If, for example, a LOGFIELD is only used as a Trigger, you may not want to import its data to ebase.

- Mapping LOGFIELDS to Buckets

A special case of Target Fields are Bucket 1- Bucket 8. The values contained within the Bucket fields determine the Entry Code used by the Log Entry. By mapping a LOGFIELD to a Bucket, you are setting that Entry as a 'Variable Entry', meaning that which Entry Code each Log Entry uses will depend on the values in that LOGFIELD. Make sure you have a good understanding of how Entry Codes work and a well-defined Code scheme before you attempt this kind of mapping.

NOTE: Only LOGFIELDS 1-10 may be mapped to a Bucket. Plan your import accordingly.

NOTE: Only provide mappings for those LOGFIELDS that you extracted data into. (Here's where it's handy to have your field mappings written down.)

CAUTION: If you create a code that is the same as an existing code already inside ebase, the importer will create a duplicate code with the same name. This could cause a lot of confusion when you go to use the data. If you want to see what codes already exist inside your copy of ebase, run the Code List report: REPORTS>Special>Code list.

Steps:

14. Complete mapping settings for all LOGFIELDS that contain data. (You can click "Back" and "Next" icons at the bottom of the screen to cycle through your records and see what's in each LOGFIELD.)
15. Click "Next" when mappings are complete.

External Import Wizard - Step 6: Define Entry Codes

You must now indicate which Entry Code to use for the created Log Entries mapped in step 5. It is recommended that you create all necessary Entry Codes before importing. However, if you define a Code that does not already exist, the Import Tool will create it for you.

There are two types of Entry Code definitions: 'Single' (or 'Static') and 'Variable'. 'Single' codes have no LOGFIELDS mapped to Code buckets, and use the same Entry Code for all Entries

created. 'Variable' codes have one or more LOGFIELDS mapped to Code buckets, and the Entry Code used by created Entries will vary based on the values in these fields.

- 'Single' Codes

Choose an existing Code from CodeGenerator, or enter Title and Bucket values to create a new code.

- 'Variable Codes'

When you define a 'variable' code, the Import Tool will determine whether it needs to create any new codes, or if all necessary codes already exist in CodeGenerator. If the former, you will be asked to provide titles for the codes as part of the final "Move Data to ebase" step in the Preview Area.

After you define each code, clicking "Next" will take you to the next code, or to the next Wizard step once you have completed defining all codes.

NOTE: Membership payment codes contain a flag that tells ebase to count Entries with that code toward membership status. If you choose a code that already exists in CodeGenerator and has this flag, the payment entries you create will also have the flag and will trigger membership status automatically. (This is the best-case scenario, and you should check before importing that your membership codes all have the 'Member/Recur Payment' box checked.) However, if you create a new code as part of the import, or if the pre-existing code you choose does not have this flag checked, the entries you create will not have the flag and will not trigger membership status.

Steps:

16. Go to Admin->Setup Codes
17. Find the membership code(s) in question, and edit each one
18. Check the Member/Recur Payment box
19. Click OK
20. Once you've checked all the appropriate codes, click Admin, then Maintenance Scripts->Fix Log Codes. This routine will flag all of your existing Entries appropriately.

Steps:

21. Enter definition for indicated Entry #

- For 'Single' Codes

You have two choices. (1) Select "Use Existing Code" and choose an existing Entry Code from the menu, or (2) Select "Create New Code" and enter a Title and Bucket values for the new code, which the Import Tool will create for you.

- For 'Variable' Codes:

Enter a value for Buckets not already populated by a LOGFIELD (which will be indicated on the screen).

22. Click "Next" to go on to the next Entry #

External Import Wizard - Step 7: Save Configuration

Enter a name for the configuration you have just completed, if a name does not already exist.

If you plan on re-using this configuration, it is important to choose a name that will enable you to identify which Import Tool to use next time you need to import a similar file.

Steps:

23. Enter a configuration name.
24. Click "Next".

External Import Wizard - Step 8: Ready to Preview

You have completed configuring the Import Tool. Click "Finish" to move records to the Preview Area.

As part of this process, the Wizard may (depending on options selected):

- Import Contact records
- Create Location records according to your settings
- Create Log Entries according to your LOGFIELD mappings and Entry Code Definitions
- Create Entry Codes where necessary

NOTE: This process is complex and may take considerable time. The larger your source file, and the more LOGFIELDS used in your mappings, the longer it will take. The process will be completed more quickly if you first close any other programs on your computer and keep ebase in the foreground as the procedure runs.

NOTE: The screen may go blank or flicker during the extraction/transformation process. This is not an indication of a problem. Do not interrupt the process unless you are sure your computer has frozen (cannot move mouse) and all disk activity stops for a long period of time.

Steps:

25. Click "Finish" to create records and move all data to the Preview Area.

External Import Wizard - Field Details - Address Fields

The following is a more detailed explanation of how the External Import Wizard handles importing address fields.

Address fields are divided into ADDRESS 1 and ADDRESS 2. Within each of these, many fields are available. Each ADDRESS that you import data into will become a Location in ebase.

If you import data into the Location field (ADDRESS 1:Location <or> ADDRESS 2:Location), this will be used as the LocationName of the Location. If these field(s) are empty, the default location name (from step 4 of the Import Wizard) will be used.

ADDRESS 1 (when it contains data) will always become the Primary address of the Contact, regardless of the value(s) in the :Location field(s). This is true even if ADDRESS 1 is an incomplete mailing address and ADDRESS 2 is complete.

FAQ: What if my Source Data contains multiple addresses separated by type (e.g. Home Address and Work Address) and I want to be able to dynamically designate which is primary? (For example, use Work Address if it exists, otherwise use Home Address.)

A: You will need to modify your source data to fit the ADDRESS 1 / ADDRESS 2 structure described above. This should be fairly easy to do in Excel or FileMaker Pro or another database application. Add fields/columns to your source data that will correspond to ADDRESS 1 / ADDRESS 2 fields, and populate them according to which address should be primary.

External Import Wizard - Field Details - Email/Phone/Fax/URL

The following is a more detailed explanation of how the External Import Wizard handles importing non-address contact info fields.

Contact information (other than the mailing address and related info) is stored in a ContactLocation record in ebase. Each ContactLocation record is related to a Contact, and may or may not be related to a Location (i.e. address).

The following fields are available for import (listed with the number of iterations of each field available):

- EMAIL (1-3)
- FAX (1-2)
- PHONE (1-4)

So a single contact record may be imported with up to 3 email addresses, up to 2 fax numbers, etc. Each import field is numbered. You should always import into the fields in numerical order (i.e. use field 1 first, then field 2 if necessary, etc.)

Each field also has a companion Type field available for import. (e.g. EMAIL 1 and EMAIL 1:Type).

If you populate the Type field, the value will be used as the ContactLocationName for the ContactLocation record that will contain the Email address. The Import Wizard combines the data into ContactLocation records based on the ContactLocationName. (e.g. an EMAIL address marked "Work" and a PHONE number marked "Work" will be put into a single ContactLocation record.) If the Type field is not populated, the default values chosen in Step 4 of the Wizard will be used.

Phone numbers are stored as a single field in ebase. However, you can import a phone number from up to three source fields (as area code, number, and extension), if that is how your source data is formatted. To import a single field to Phone 1, just use the PHONE 1 field. To import a three-field phone number to Phone 1, map the area code to PHONE 1:AreaCode, the number to PHONE 1, and the extension to PHONE 1:Extension.

External Import Wizard - Field Details - LOGFIELDS

ebase records payments, communications, interests and many other types of data by attaching entry codes to contact records. You will understand mapping of LOGFIELDS more easily if you are familiar with the way entry codes work in ebase. It is recommended that you have your code set created and in ebase before you begin importing your data into ebase.

The following is a more detailed explanation of how the External Import Wizard handles creation of Log Entries using data in the LOGFIELDS. The twenty-five LOGFIELDS in the Import Wizard are temporary storage locations for data that will eventually become part of a Log entry (or determine the Entry Code to be used by a Log entry.)

NOTE: The Import Wizard generally refers to "log entries" instead of "entry codes". These terms can be used interchangeably. For consistency, this explanation will use the term log entries.

You use data imported into the LOGFIELDS fields to answer two questions about log entries:

- Should a log entry be attached to the contact that is being imported?
- What data should go in the entry detail fields for that contact?

In other words, LOGFIELDS are used as a trigger field--they trigger whether a log entry is attached to a contact or not-- and they are used as data fields to fill in information contained within the log entry.

Suppose you were importing the following chart:

Name	payment date	payment amount
Bob	1/12/02	\$50
Sue	1/13/02	\$55
Sue	7/12/02	\$45
Sid		

Notice that Bob has made one payment, Sue has made two payments and Sid has made no payments. When importing this data using the Import Wizard you should do the following mapping:

Name>NAME1:First
payment date>LOGFIELD01
payment amount>LOGFIELD02

If you were to chart the new mapping, it would look like this:

NAME1:First	LOGFIELD01	LOGFIELD02
Bob	1/12/02	\$50
Sue	1/13/02	\$55
Sue	7/12/02	\$45
Sid		

TIP: it is easier to reformat your data before you import so that the field names are the same as the field names used in the Import Wizard.

During the import process, the Import Wizard will prompt you to map your log fields. (Step 5 of the process). This is where you set up trigger fields, data fields and determine how many log entries you want to create.

LOGFIELD01 will be the trigger field for the Log Entry. If there is data contained within LOGFIELD01, the Import Wizard will create a log entry. If there is no data contained within LOGFIELD01, the Import Wizard will not create a log entry.

To set up LOGFIELD01 as a trigger field, on the Map Log Fields screen (step 5) you will want to select "Not Empty" next to payment date.

NOTE: The import wizard will allow you to trigger a log entry if the field is not empty, if the field is true (true is defined by 1, false by 0) or trigger the log entry always.

In this example, LOGFIELD01 and LOGFIELD02 will be data fields (notice that LOGFIELD01 is both trigger field and a data field). To select the field that the data will be imported into, click in the "Data Target Field" column and choose the field name. In this example, use LOGFIELD01 for the "DatePosted" for LOGFIELD01 and "EntryAmount" for LOGFIELD02.

NOTE: LOGFIELDS can be trigger fields only, data fields only or both types of field.

Since you want to map data from LOGFIELD01 and LOGFIELD02 to the same log entry, make sure the entry number for both LOGFIELDS is "1". This tells the Import Wizard that the data contained within that field will map to the same log entry.

If you wanted to create two different log entries, you would set LOGFIELD02 as a trigger field and you would change the entry number for LOGFIELD02 to "2".

Once you have determined the trigger and data fields, the Import Wizard will ask you to assign a code to each entry number (Step 6). If you already have a code set created, you can select the "Use Existing Code" button and choose a code from a list of Code Titles. If you need to create a new code, choose "Create New Code" and enter the relevant information. It is best to use a code that already exists.

Continuing the example of Bob, Sue and Sid, let's assign the pre-existing payment code "Mbr payment, associate" to this entry.

Now when the Import Wizard creates log entries for these contacts it will work like so:

Bob has information in LOGFIELD01, therefore he has a log entry. That log entry uses LOGFIELD01 data for "DatePosted" and LOGFIELD02 data for "EntryAmount". Log entry= Mbr payment, associate, 1/12/02, \$50

Sue has information in LOGFIELD01, therefore she has a log entry. That log entry uses LOGFIELD01 data for "DatePosted" and LOGFIELD02 data for "EntryAmount". Log entry= Mbr payment, associate, 1/13/02, \$55

Sue has more information in LOGFIELD01, therefore she has another log entry. That log entry uses LOGFIELD01 data for "DatePosted" and LOGFIELD02 data for "EntryAmount". Log entry= Mbr payment, associate, 7/12/02, \$45

Sid has no information in LOGFIELD01, therefore he has no log entry.

Some Additional Information about Assigning LOGFIELDS to Data Fields:

The Import Wizard allows you to define up to 10 log entries to be created as part of the import. Within each of these ten entries, you must define which entry code the entries will have. Entries are defined by Bucket fields. If you map a LOGFIELD to import data into a Bucket, you are setting up a "variable" code definition, meaning that the Entry Code will vary from record to record depending on the data imported from the LOGFIELD. Only LOGFIELDS 1-10 may be mapped to a Bucket. Plan your import accordingly.

External Import Wizard - Field Details - Name Fields

The following is a more detailed explanation of how the External Import Wizard handles importing Name fields.

Each contact record in ebase must contain a name. There are three types of contact records, and each contains a name stored in a different field in ebase, and imported via a different field in the Import Wizard. These are detailed below:

RECORD TYPE	EBASE NAME FIELD	IMPORT WIZARD NAME FIELD
Individual	NameFirst / NameLast	NAME1:First / NAME1:Last (or see below)
Family	GroupLableLine1 [sic]	FAMILY NAME
Organization	Org (in ContactLocation)	ORG NAME

Note that additional name fields may be imported as well (Name1:Suffix, Name1:Middle, Name2, etc.) but the above are the minimum required name fields for each record type.

The record type is determined by the value imported to CONTACT RECORD TYPE. You will later have the option to use 'Individual' as the default for all records without a value in this field.

There are several options when importing the name of an individual record. Instead of using the separate name fields (NAME1:First, NAME1:Last, NAME1:Prefix, etc.), you can import data into NAME1:FullName or NAME1:FirstAndLast. In these cases, the Wizard will then attempt to parse the imported string into the various name fields (last, first, prefix, etc.) This may not always happen according to your expectations, so be sure to check the records in the Preview Area before importing to ebase.

NOTE: You should import to NAME1:First / NAME1:Last or NAME1:FullName or NAME1:FirstAndLast, but never to more than one of these in a single record.

Note also that FAMILY NAME is for the name of a Family record only, and should not contain the last name of an Individual record. Family records may be imported directly, and will be created by the Import Wizard as part of the process of splitting any two-name Individual records.

A record is considered two-name when NAME2:Last (or NAME2:FullName or NAME2:FirstAndLast) contains data.

NOTE: If you import a record of type Organization and also import a First and/or Last Name, that name will currently be imported as a notation in Profile Note.

External Import Wizard - Field Details - ID Fields

The following is a more detailed explanation of how the External Import Wizard handles importing ID fields.

Two ID fields are available for import. Neither is required.

ID:EBASEv2

This field, if populated, will be used as the ContactID for the records imported. If you are importing Contact records, this field will be set automatically to a random value if you do not populate it. This field can be used when import Log Entries only to connect the Log Entries to an existing ebase contact record.

ID:LEGACY

Can contain an ID number or string from any legacy source. The purpose of storing this information is:

- To allow you to 'backtrack' to your legacy database, lookup legacy info when necessary, and identify which records came from a legacy source.
- To allow you to connect Contact records and Log Entries based on this ID. This is essential when doing a multipart import. (For example, if your Names and Donations are kept in two separate tables, and you import first Names and then Donations, the ID:LEGACY will be the linking field that tells the ImportWizard which Contact record to link each Donation to.)

External Import Wizard - Field Details - Profile Note

Profile Note is a field in the Contacts file in ebase that appears on the Overview screen. It is a freeform text field in which you can enter multiple lines of information.

The External Import Wizard allows you to populate this field with data from multiple source fields. Simply map your source fields to one of the ProfileNote import fields (PROFILE NOTE 1 through PROFILE NOTE 8). The data imported will be concatenated together and imported to ProfileNote. Note that in many cases it will make more sense to create a Log Entry from your source field rather than put it in to Profile Note.

Log Entries are much more easily searchable and categorizable than phrases or words in Profile Note, and can be much more easily integrated into ebase processes.

External Import Wizard - Field Details - Complete Field List

The following is a complete list of fields in the External Import Tools. Use this as a reference (you can copy it and paste it elsewhere) to help you plan your field mapping. You can also copy-and-paste individual names for use as ebase field names or Excel column headers (see Help topic "Tips for Extracting Source Data").

ACTION PREFERENCE	ADDRESS 1:SupplementaryAddress
ADD BY	ADDRESS 1:TimeZone
ADD DATE	ADDRESS 1:ZIP
ADDRESS 1:City	ADDRESS 1:ZIP4
ADDRESS 1:Country	ADDRESS 2:City
ADDRESS 1:County	ADDRESS 2:Country
ADDRESS 1:DSTFlag	ADDRESS 2:County
ADDRESS 1:GeocodeLatitude	ADDRESS 2:DSTFlag
ADDRESS 1:GeocodeLongitude	ADDRESS 2:GeocodeLatitude
ADDRESS 1:GeocodeUTMEasting	ADDRESS 2:GeocodeLongitude
ADDRESS 1:GeocodeUTMNorthing	ADDRESS 2:GeocodeUTMEasting
ADDRESS 1:GMT	ADDRESS 2:GeocodeUTMNorthing
ADDRESS 1:Location	ADDRESS 2:GMT
ADDRESS 1:Note	ADDRESS 2:Location
ADDRESS 1:State	ADDRESS 2:Note
ADDRESS 1:StreetAddress	ADDRESS 2:State

ADDRESS 2:StreetAddress	LOGFIELD022
ADDRESS 2:SupplementaryAddress	LOGFIELD023
ADDRESS 2:TimeZone	LOGFIELD024
ADDRESS 2:ZIP	LOGFIELD025
ADDRESS 2:ZIP4	NAME1:First
ADDTIME	NAME1:FirstAndLast
BIO	NAME1:FullName
BIOShort	NAME1:Last
CONGRESS DISTRICT US	NAME1:Middle
CONTACT BY	NAME1:Nickname
CONTACT DURING	NAME1:Prefix
CONTACT FREQUENCY	NAME1:Salutation
CONTACT RECORD TYPE	NAME1:Suffix
CUSTOM GREETING	NAME2:First
DATE OF BIRTH	NAME2:FirstAndLast
EDUCATION	NAME2:FullName
EMAIL 1	NAME2:Last
EMAIL 1 Type	NAME2:Middle
EMAIL 2	NAME2:Nickname
EMAIL 2 Type	NAME2:Prefix
EMAIL 3	NAME2:Salutation
EMAIL 3 Type	NAME2:Suffix
EMPLOYER	NATIONAL ID
FAMILY NAME	OCCUPATION
FAX 1	ORG CATEGORY
FAX 1 Type	ORG DEPARTMENT
FAX 2	ORG NAME
FAX 2 Type	ORG OFFICE
GENDER Name1	ORG TITLE
GENDER Name2	OTHER ID
HOUSE DISTRICT STATE	OWNER
ID:EBASEv2	PARTY
ID:LEGACY	PASSWORD
INCOME	PHONE 1
INTERNETChatID	PHONE 1 Type
LOGFIELD01	PHONE 1:AreaCode
LOGFIELD02	PHONE 1:Extension
LOGFIELD03	PHONE 2
LOGFIELD04	PHONE 2 Type
LOGFIELD05	PHONE 2:AreaCode
LOGFIELD06	PHONE 2:Extension
LOGFIELD07	PHONE 3
LOGFIELD08	PHONE 3 Type
LOGFIELD09	PHONE 3:AreaCode
LOGFIELD010	PHONE 3:Extension
LOGFIELD011	PHONE 4
LOGFIELD012	PHONE 4 Type
LOGFIELD013	PHONE 4:AreaCode
LOGFIELD014	PHONE 4:Extension
LOGFIELD015	PHONE MOBILE
LOGFIELD016	PHONE PAGER
LOGFIELD017	PhotoURL
LOGFIELD018	PRECINCTCity
LOGFIELD019	PRECINCTCounty
LOGFIELD020	PROFILE NOTE 1
LOGFIELD021	PROFILE NOTE 2

PROFILE NOTE 3
PROFILE NOTE 4
PROFILE NOTE 5
PROFILE NOTE 6
PROFILE NOTE 7
PROFILE NOTE 8
PROJECTID
PUBLIC KEY
RACE\ETHNICITY
RESEARCH
SENATE DISTRICT STATE
SOURCE
URL 1
VOTEinCITY
VOTEinCOUNTY
VOTEinPRECINCT

External Import Wizard - Tips for Extracting Source Data

Some tips to make extraction of source data easier:

Write down your field mappings

Unless your source data is very simple, it is very helpful to have your field mappings on paper for reference as you complete the Import Wizard. Otherwise it is easy to forget which field you mapped where (and there's no way for FileMaker to remind you).

To help with this, there are forms you can download and fill-in as you do your mappings. They are available on the ebase community Web site.

Use FileMaker or MS Excel files

If your source data is a text file (CSV or TAB), think about converting it into a FileMaker Pro or MS Excel file before importing. The advantage to these file formats is that FileMaker can read the field/column names and display them during import, making import field mapping much easier. In this case, or any other when FileMaker can't recognize your field names, a good alternative is to include a header record/row that contains field/column names instead of data. If your source file is .tab or .csv, this header will be imported as a record, so you'll need to remember to delete it in the Preview Area before importing to ebase.

Re-name your source fields with Import Wizard field names

For even faster field mapping, decide in advance what Import Tool fields your source fields map to. Then, in your Excel spreadsheet or FileMaker source database, change the names of the columns or fields to match the Import Tool fields exactly. (Make sure you've saved a backup copy of your source data first.) See Help Topic "Import External Data - List of Import Fields" for a cut-and-pasteable list of field names to use.

Then, when it comes to the Import Field Mapping dialog in Step 2, choose View By = "Matching Names" in the upper right. Assuming you got the names exactly right, all of your mappings should happen automatically, no sliding required.

Import a common identifier for all records imported from the same data source

You may import it into any unused field (i.e. ProfileNote, Source). This will allow you to later find all records that you imported from a particular data source. If you accidentally import data incorrectly, (i.e. forgot to check for duplicates, map data to the wrong field), you can easily delete the records and re-import correctly.

Scrub your data before you import it

It is much easier to clean up data outside of ebase. You can use text functions in Excel to parse names, concatenate data, search and replace. You can use Perl scripts to perform more complex data transformations. Use the migration to ebase as a housecleaning opportunity. Get rid of incomplete records, eliminate duplicates, ensure data conforms to your style sheet and make sure each field in your source data contains the same type of information.

Import External Data--How LOGFIELD Mapping Works

ebase records payments, communications, interests and many other types of data by attaching entry codes to contact records. You will understand mapping of LOGFIELDS more easily if you are familiar with the way entry codes work in ebase. It is recommended that you have your code set created and in ebase before you begin importing your data into ebase.

NOTE: The Import Wizard generally refers to "log entries" instead of "entry codes". These terms can be used interchangeably. For consistency, this explanation will use the term log entries.

You use data imported into the LOGFIELDS fields to answer two questions about log entries:

1. Should a log entry be attached to the contact that is being imported?
2. What data should go in the entry detail fields for that contact?

In other words, LOGFIELDS are used as a trigger field--they trigger whether a log entry is attached to a contact or not-- and they are used as data fields to fill in information contained within the log entry.

Suppose you were importing the following chart:

Name	payment date	payment amount
Bob	1/12/02	\$50
Sue	1/13/02	\$55
Sue	7/12/02	\$45
Sid		

Notice that Bob has made one payment, Sue has made two payments and Sid has made no payments. When importing this data using the Import Wizard you should do the following mapping:

```
Name>NAME1:First
payment date>LOGFIELD01
payment amount>LOGFIELD02
```

If you were to chart the new mapping, it would look like this:

NAME1:First	LOGFIELD01	LOGFIELD02
Bob	1/12/02	\$50
Sue	1/13/02	\$55
Sue	7/12/02	\$45
Sid		

(In fact, it is easier to reformat your data before you import so that the field names are the same as the field names used in the Import Wizard.)

During the import process, the Import Wizard will prompt you to map your log fields. (Step 5 of the process). This is where you set up trigger fields, data fields and determine how many log entries you want to create.

LOGFIELD01 will be the trigger field for the Log Entry. If there is data contained within LOGFIELD01, the Import Wizard will create a log entry. If there is no data contained within LOGFIELD01, the Import Wizard will not create a log entry.

To set up LOGFIELD01 as a trigger field, on the Map Log Fields screen (step 5) you will want to select "Not Empty" next to payment date.

NOTE: The import wizard will allow you to trigger a log entry if the field is not empty, if the field is true (true is defined by 1, false by 0) or trigger the log entry always.

In this example, LOGFIELD01 and LOGFIELD02 will be data fields (notice that LOGFIELD01 is both trigger field and a data field). To select the field that the data will be imported into, click in the "Data Target Field" column and choose the field name. In this example, use LOGFIELD01 for the "DatePosted" for LOGFIELD01 and "EntryAmount" for LOGFIELD02.

NOTE: LOGFIELDS can be trigger fields only, data fields only or both types of field.

Since you want to map data from LOGFIELD01 and LOGFIELD02 to the same log entry, make sure the entry number for both LOGFIELDS is "1". This tells the Import Wizard that the data contained within that field will map to the same log entry. If you wanted to create two log entries, you would set LOGFIELD02 as a trigger field and you would change the entry number for LOGFIELD02 to "2".

Once you have determined the trigger and data fields, the Import Wizard will ask you to assign a code to each entry number (Step 6). If you already have a code set created, you can select the "Use Existing Code" button and choose a code from a list of Code Titles. If you need to create a new code, choose "Create New Code" and enter the relevant information. It is best to use a code that already exists.

Continuing the example of Bob, Sue and Sid, let's assign the pre-existing payment code "Mbr payment, associate" to this entry.

Now when the Import Wizard creates log entries for these contacts it work like this:

Bob has information in LOGFIELD01, therefore he has a log entry. That log entry uses LOGFIELD01 data for "DatePosted" and LOGFIELD02 data for "EntryAmount". Log entry= Mbr payment, associate, 1/12/02, \$50

Sue has information in LOGFIELD01, therefore she has a log entry. That log entry uses LOGFIELD01 data for "DatePosted" and LOGFIELD02 data for "EntryAmount". Log entry= Mbr payment, associate, 1/13/02, \$55

Sue has more information in LOGFIELD01, therefore she has another log entry. That log entry uses LOGFIELD01 data for "DatePosted" and LOGFIELD02 data for "EntryAmount". Log entry= Mbr payment, associate, 7/12/02, \$45

Sid has no information in LOGFIELD01, therefore he has no log entry.

Importing Log Entries--Run "Fix Log Codes" Script

When you import log entries using the External Import Wizard, you need to run the "Fix Log Codes" script (ADMIN>Maintenance Scripts) before you can do finds on the entries. Until you run this script, you will not return correct results when searching on the entries you imported. This script may take a long time in a large database, so you may want to run it at the end of the day.

CAUTION: If you create a code that is the same as an existing code already inside ebase, the importer will create a duplicate code with the same name. This could cause a lot of confusion when you go to use the data. If you want to see what codes already exist inside your copy of ebase, run the Code List report: REPORTS>Special>Code list.

Preview Records in Preview Area

From the Import Data menu, several screens allow you to view the records in the Preview Area. From these screens, you can also edit data, do finds, and replace data in found sets (by using standard FileMaker Pro menu commands).

The available screens are:

- Contacts: Name, bio/profile fields, primary location

- Locations: Full info (address, email, phone, etc.) from all locations attached to contact
- Log History: List of all log entries attached to contact
- Log Detail: Full detail of a single log entry
- Entry Codes: Listing of all entry codes in use by records in Preview Area

Steps:

3. Click on IMPORT/EXPORT>Import Data
4. Choose one of the Views under "Preview Records:".

Preview Area: Overview

The Preview Area is a temporary holding area for your data before it is imported to ebase. Using one of the Import Tools (v1 or External) you will extract data from one or more source files, transform it, and bring it into the Preview Area.

Once in the Preview Area, you can view your data, edit fields, even do find/replace operations. Unlike the rest of ebase, these functions are activated using the built-in FileMaker menu commands, not by scripts or buttons.

Once you are done editing/previewing, move your data into ebase by clicking "Move Data to Ebase".

Note that you can run multiple passes of the Import Tools and bring multiple "sets" of data into the Preview Area. You don't have to bring each set into ebase before extracting the next. This will often be a helpful way to handle imports if your data must be extracted in parts. (For example, you might have one spreadsheet containing contact names and addresses, and another containing payments made by those contacts.)

The Preview Area is comprised of Contacts, Locations (and ContactLocations), Log Entries, and Entry Codes. A particular import may or may not include all of these types of records.

For example, you might import from a file that contains only payment data, no contact information. The payment data is transformed into log entries. The Import Tool allows you to do this as long as you can connect the log entries to Contact records that already exist in ebase. You have the option to clear all records out of the Preview Area when exiting, moving data to ebase, or importing new data.

Move Data to ebase: Overview

Once you have extracted data from a source using either the v1 Import Tool or the External Import Tool, use this function to import all records from the Preview Area to ebase.

As part of this process, the import tool will:

- Check for duplicates, both with records already in ebase and with other records in the Preview Area.
- Give you choices as to how to handle any found duplicates.
- Check that essential fields in each record are populated (Record Type, etc.)
- Check that no log entries are being imported without an attached Contact.
- Split two-name records into two Individual records and one Family record.

Make sure that you have reviewed your data while it is still in the Preview Area. Mistakes are more difficult to correct once your records are in ebase.

NOTE: The import process is complex and may take considerable time. The larger data set, the longer it will take. The process will be completed more quickly if you first close any other programs on your computer and keep ebase in the foreground as the procedure runs.

NOTE: When importing only entries using a ImportedDataLegacyID-EbaseLegacyID match, there is little feedback to the process and what is there, may be confusing. The screen that shows created entries prior to "Move to Ebase" displays confusing data such as describing all entries as <Unlinked> -- which looks like some kind of error -- but simply refers to the fact that no name data is being imported at the same time.

Steps:

5. IMPORT/EXPORT>Import Data>Move Data to Ebase

Dupcheck Options

This tool allows you to indicate how the Import Tool should check for duplicate/matching Contact records. Dupchecking can be done both against Contact records in ebase ("Ebase Dupcheck"), and against other records in the Preview Area ("Preview Area Dupcheck"). It is recommended that you enable both kinds of dupchecking.

Dupchecking can be done using any or all of 4 possible methods:

- Ebase 2.x ID - ebase uses a randomly-assigned 8-character ID code. Each record is also randomly assigned an ID code (unless you imported one).
- Legacy ID - Imported by you (as ID:LEGACY) and stored in ebase for previously-imported records.
- Name/Address - Uses a 16-character (or less) string comprised of:
 - The first 4 letters of the First and Last Names (or 8 letters of the Org or Family name, if not an Individual record)
 - The first 4 letters of the City of the primary address
 - The first 4 digits of the Zip/Postal Code of the primary address
 - The full name of the Contact

Generally, you will want to enable all dupcheck methods. However, sometimes you may want to disable one or more methods. For example, if you know your data does not contain any Address information, you may want to disable "Name/Address". This will speed up the dupcheck process and may result in fewer false duplicates.

Click 'Revert to Defaults' to enable all dupcheck methods and revert all dupcheck settings to their default values.

EBASE DUPCHECK

Next to each of the 4 dupcheck methods, you can indicate how to handle Log Entries and Location records if a duplicate Contact record is found. Choose "Attach to v2 Record" to import the Log/Location records and attach to the matching record found in ebase. Or choose "Omit" if you don't want to import the Log/Location records if a duplicate is found. These settings only take effect if the dupcheck method is enabled.

NOTE: You may sometimes intend every record to find a duplicate in ebase. (That is why they are referred to as 'duplicates/matches') This will be the case if your intention is to import only Log Entries and attach them to existing ebase Contact records, but your source data contains no ID code by which to connect the Log Entries to the Contact records directly. In this situation, you can use Name or Name/Address to match your records to records in ebase. You will only end up importing those Contacts that do not find a matching record in ebase (of which there may be none).

NOTE: Be careful if you choose "Attach to v2 Record" for Locations. No dupchecking is performed on the Locations themselves, and it is possible for you to end up with duplicate Locations.

PREVIEW AREA DUPCHECK

Indicate whether to transfer Log Entries to a matching record when a duplicate is omitted. This will not always be possible, for example if you decide to omit both records of a pair of duplicates.

Steps:

6. Enable or disable Ebase Dupcheck and Preview Area Dupcheck using the checkboxes
7. Enable or disable methods within each Dupcheck
8. Set options for transfer of Log Entries/Locations
9. Click "Next" to begin dupcheck

Review Duplicate Contact Records - ebase

If one or more potential duplicates have been found between the Contact records in the Preview Area and the Contact records in ebase you will get the opportunity to review these duplicates. (Review Duplicate Contact Records screen.)

Each potential duplicate is listed on its own line, with some information given about each record to help you determine if the records are really duplicates. The Matched By column indicates by which method the potential duplicate was identified.

If any of the duplicate pairs are not really duplicates, check the "Not a Dup" box. This will instruct the import tool to ignore the potential duplicate and import the record as normal. Any listed records that are not checked off as "Not a Dup" will not be imported to ebase. (What happens to Log Entries/Locations depends on your settings in Dupcheck Options.)

At the bottom of the review Duplicate Contact Records screen, you can view the total number of duplicates out of the total number of records to import.

NOTE: In certain cases (if you're attempting to import only Log Entries) you may intend all contact records to find matches in ebase. See help topic "Dupcheck Options" for more information.

Steps:

10. Review potential duplicates
11. If any are not true duplicates, mark "Not a Dup" box
12. Click "Next" to continue

Review Duplicate Contact Records - Preview Area

If one or more potential duplicates have been found among the Contact records in the Preview Area you will be given the opportunity to review them.

Each potential duplicate is listed on its own line, with some information given about each record to help you determine if the records are really duplicates. The groups of potential duplicates are indicated by Group Numbers in the Dup Group column.

By default, no records are omitted. If you decide that any of the duplicate groups really are duplicates, check the "Omit" box for the record(s) that should be omitted (not imported). If you selected the "Transfer Log Entries" option in Dupcheck Options, any Log Entries attached to the omitted record will be transferred to the first non-Omitted record in the Dup Group.

NOTE: If a record was previously omitted because of a duplicate with an ebase record, that record will not show up here.

Steps:

13. Review potential duplicates
14. If any are true duplicates, mark the records that should not be imported "Omit"
15. Click "Next" to continue

Review Unlinked Log Entries

If one or more Log Entries in the Preview Area are not linked to any Contact record you will be given the opportunity to review them.

Generally this will only happen if you imported Log Entries only, and one or more Entries failed to find a matching ebase record based on ID:EBASE or ID:LEGACY.

For each unlinked Log Entry, you must either: (1) Check the Omit box (the Log Entry will not be imported), or (2) Choose a Contact record to link the Entry to from the "Link To Contact" menu. However, in many cases getting unlinked Log Entries may be an indication that something was amiss with your source data, and you may want to go back and correct it and re-import it, rather than attempt to link the log entries here. (If you choose to do this, click "Cancel" to cancel import of data to ebase.)

Steps:

16. Review unlinked entries
17. For each entry, click Omit or choose a Contact record to link to under "Link To Contact"
18. Click "Next" to continue

Re-Import

The Re-Import feature is for use with External Import Tool only (not ebase v1 Import Tool). If you preview your data and realize that you made an error in your import mappings in the Import External Data wizard, this function allows you to go back to the wizard, change any necessary settings, and re-import your data to the Preview Area. All data currently in the Preview Area will be deleted.

NOTE: Once you leave the Preview Area by going back to ImportExport or MainMenu, this function will no longer be available. To use it, you must activate it after previewing your data, before leaving the Preview Area.

Steps:

19. IMPORT/EXPORT>Import Data>Re-Import

Clear Preview Area

This function will delete all records from all parts of the Preview Area. If you have already imported your records to ebase, make sure that all of the records have been imported correctly before you do this.

Note that if you have old records in the Preview Area that have already been imported to ebase, you will need to clear them before starting a new import. Otherwise, ebase will attempt to import the old records again along with the new ones.

Steps:

20. IMPORT/EXPORT>Import Data>Clear Preview Area

IMPORT LEAF DATA

The process initiated by this menu item imports data from a file in the LEAF format to EnhancedData.200. This is primarily intended for voter data provided by the list enhancement process promoted by the League of Conservation Voters, but is useful for lists to which data such as geocoding has been added.

To create the source file for the list enhancement process, use the report Export for Enhanced Data – LCV in the Special Use category under the Reports Menu.

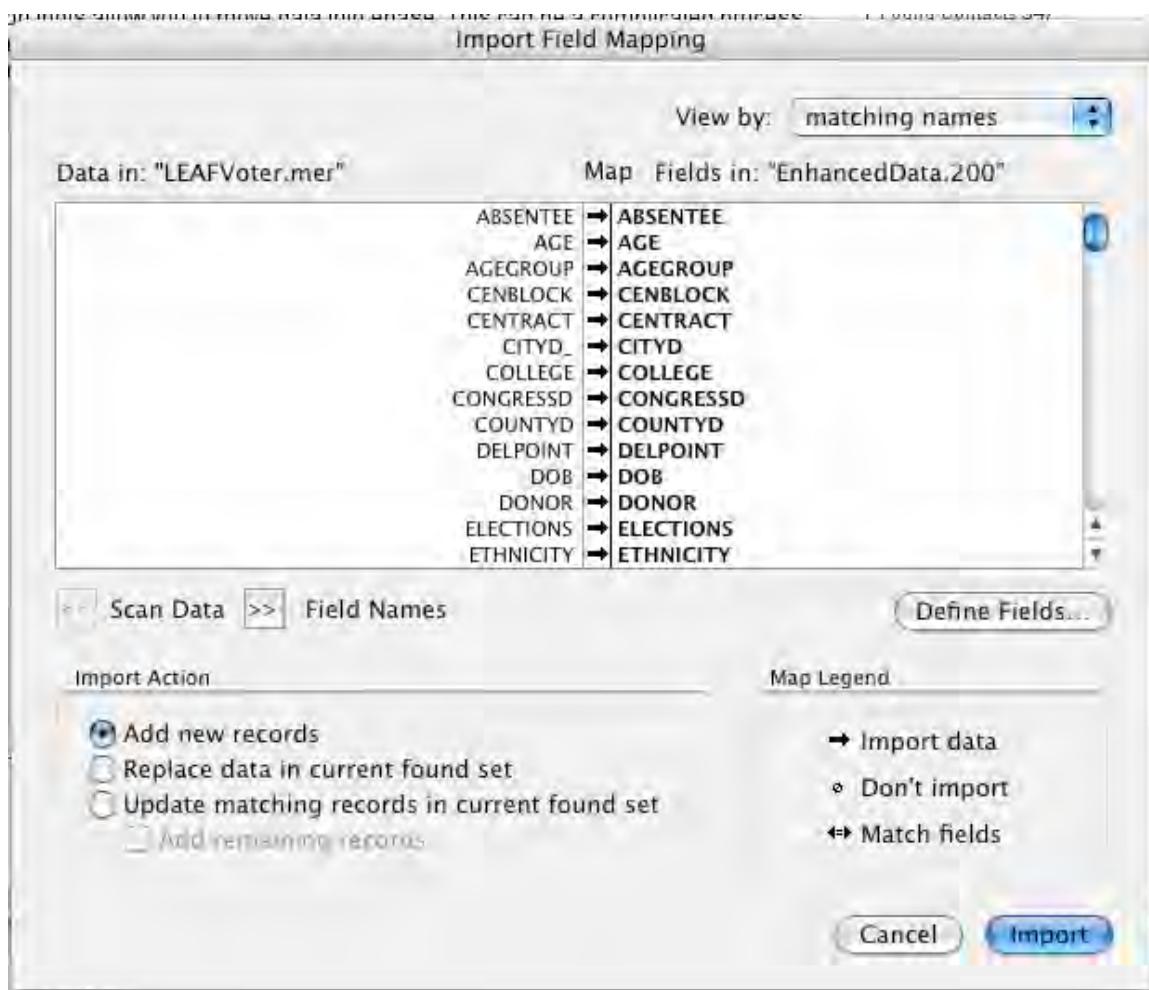
To start the LEAF import process select the menu item Import>Import LEAF Data. If there are records in the EnhancedData.200 file, you will be asked if you want to delete them before proceeding. Normally you will choose Yes because the existing records will have data from the previous enhancement cycle. The file you are importing will be a more current version of the data for many of the same contacts.

If, however, you provided more than one file to the agency which did the enhancement (members and non-members, for example) you will want to choose No when you import the second file to add those records to the EnhancedData.200 file without deleting the records from the first file.

If you choose Yes, you will get a dialog confirming that you really want to delete the current records. Choose Delete All.

Next you will see a standard Find File dialog. Navigate to the file to be imported and select Open.

You will be presented with a FileMaker import dialog which allows you to map the fields in the source file to the fields in EnhancedDate.200.



If you are importing from a file in the LEAF 2006 format you can map all the fields to their appropriate destination by selecting Matching Names from the popup in the upper right corner. Scroll down through the list to confirm that all the data you want to import is lined up with a field in EnhancedData.200 in the right hand pane.

If you are using another format, you can adjust the mapping by putting the cursor on a field in the right hand pane and dragging it up or down to line up with a field in the source file in the left hand pane. You can also move fields up or down by holding down the Cmd key (Ctrl on Windows) and using the up or down arrow keys.

If there is not a field in EnhancedData.200 to match a field in your source file, click Define Fields and add a field of the corresponding type.

The arrow in the column in the center means that field will be imported to the corresponding field in the right hand pane. Click in the center column to turn import on or off for that field.

When all the fields you need are lined up and set to import, click Import. You will be presented with the Import Options dialog. Check the box to Perform Auto-Enter options to insure the records record the date and user id. Click OK.

A dialog will appear confirming that the data has been imported.

In ebase 2.00 – 2.12, the EnhancedData.200 file is not integrated into the Find procedure. You can open the file as a stand-alone source of information on your constituents' voting history. It is also possible to add some of the fields in EnhancedData.200 to the search screens, for example Find Profile in Contacts.200, to include the voter data in your searches.

However, a new feature of 2.20+ is the ability to query on List Enhancement data from within ebase's normal Find procedure.

Chapter 13 Maintaining your data	1
Backup ebase regularly	1
Create a backup routine.....	1
Maintain a library of archival backups	1
Save your Hard copies.....	2
Special Admin functions.....	2
Review Deletions.....	2
Edit Payment Entries.....	2
Maintenance Scripts	3
ADMIN>Maintenance Scripts	3
ADMIN>Maintenance Scripts>View Developer Scripts	4
Disaster management.....	5
Damaged Files: DO NOT RECOVER! Restore from Backup	5
Why do files become corrupted?.....	5
How to avoid file corruption	6
You can prepare for recovery in the event of file damage:	6
Virus Protection.....	6

Chapter 13 Maintaining your data

BACKUP EBASE REGULARLY

The cost (in time, media and hardware) of performing regular backups is MINUSCULE compared to the cost of reconstructing your database from hardcopy or doing without key information because it is lost forever.

Backup Steps:

1. Close ebase and Filemaker Pro
2. Copy the ebase folder--files and all—to another storage device (hard drive, Zip drive, Flash ROM, CD, or DVD) and store it in a safe place.

Many people use an archival program (like WinZip or Stuffit) to compress their files and make a copy of their data, then store the files on another hard drive, CD, or tape backup.

Create a backup routine

You should also have a backup schedule. Backup your data every time you (or someone on your staff) changes something in ebase. It's best to schedule it at a convenient and easy-to-remember time, say at the end of each day, after the weekly staff meeting or before going home for the weekend.

A good guide: If it will take you less time to back up your data than it will take you to reconstruct and reenter that data—then *it's time to back up!*

ALWAYS back up prior to making major changes to your system (e.g. changing passwords, importing files, using the Replace command, etc.).

Maintain a library of archival backups

You should keep archival backup files for as far back as you can afford. Don't just have one backup file and overwrite it every day because, if there is a problem that is not noticed until a week after it was first created, you will need to revert to old backups and not your most recent one.

Save your Hard copies

For more information: <http://www.techsoup.org/articlepage.cfm?topicid=1&ArticleId=229> for detailed explanation of how to backup your data files.

SPECIAL ADMIN FUNCTIONS

Review Deletions

As database administrator, think carefully before deleting any contact records other than those simply entered in error. If you delete contacts for other reasons (such as because someone is deceased), you will also delete the history of what that person has contributed to your organization by his or her involvement or financial support. An historical analysis of fundraising campaigns over multiple years, for instance, will be inaccurate if you delete the names of contributors who are deceased or no longer involved with your organization.

To edit the pick list that users see when choosing a reason for deleting a record:

1. Click on ADMIN
2. Select Value Lists
3. From the pull-down menu towards the top of the screen select "DeleteReason"
4. Change a wording or add more items to the list

To review records that have been marked for deletion:

1. Click on ADMIN-->Review Deletions, (alternatively, click on CONTACTS>Tools>Review Deletions).
2. If there are any records marked for deletion there will be a red square next to the record type at the top of the screen. Click "Contacts", "Log Entries", "Locations" or "Links" at the top of the page to review the contact records, log entries, locations or community links that are marked for deletion.
3. If you wish to restore a Contact to the database: On the "Review Contacts Flagged for Deletion" screen, click the "Restore" link to the left of the contact.
4. To delete an individual contact, click the "Delete" link to the right of the contact.
5. To delete all contacts marked for deletion, click the red "Delete Contacts" button at the bottom left.
6. Navigate to the other screens to do the same for Log Entries, Locations and Links.
7. If you'd like to delete everything at one time (after you're sure that you want to delete those records currently marked for deletion), click on "Delete All".
8. Click "OK" to return to the Admin Main Menu screen.

Edit Payment Entries

For data security purposes, ebase controls the process for editing payment entries. You can correct payment entry errors in three ways:

- Enter an offsetting payment entry that "backs out" the amount of the erroneous entry with a negative dollar value. This highly controlled method is the preferred method for creating an audit trail on your payment records in ebase. For example, if a payment of \$100 was incorrectly entered as a \$1000 payment, the offsetting payment record would be for \$900.

- Mark the erroneous record for deletion, delete it (by a user with administrative level privileges), and re-enter the payment entry correctly.
- Login at the administrative level, navigate to the erroneous payment record, and edit the data in that record.

The database administrator and key management staff should decide on which method to employ and inform staff and volunteers who enter payment data of this policy.

Steps:

EXAMPLE: Editing data directly in the payment record.

1. While logged in as an administrator, click CONTACTS, navigate to the contact for which an incorrect payment record was entered.
2. Click on the entry in the “Recent log entries” portal, or if you can't see it there, click CONTACTS-->History-->Payment History.
3. Click on the "Admin Edit" button towards the bottom right of the screen and then edit the incorrect entry.
4. Click "OK."

MAINTENANCE SCRIPTS

ADMIN>Maintenance Scripts

provides a number of utility scripts that are used to rebuild and/or refresh aspects of ebase. After these scripts are run, the time and user who ran them, is recorded. You can reset these times using a developer script (described below). Here's a listing of what these scripts do:

- **Fix ContactName:** This script recalculates each contact record's ContactName field to ensure that finds and lookups that rely on ContactName work correctly. This may take a while to run if you have a lot of records in Contacts.
- **Fix Contact and Location Dup checking information:** This script rebuilds the Contact and Locations duplicate checking information. It is the same script run whenever you change any of the settings on the dedup settings page. This may take a while to run if you have a lot of records in Contacts.
- **Update Log and Update Fast Find fields:** This script rebuilds indexed “Fast Find” fields in Contacts and Log. It should be run whenever Find operations in Contact and Log aren't returning expected results. This script can take a long time, but is significantly faster than in previous releases. The time is now mostly dependent on how many records have to be fixed, rather than on just the number of records. You can use some of the developer scripts to help decide if running this script is required.
- **Fix code flags:** Run this script after an import of codes from a previous version of ebase or other source. It revises the values used in flag fields so that they conform with current practice.
- **Delete orphaned records:** This script should be run whenever you want to remove unused ContactLocation and Location records from the Location file. Orphaned records can be left as a result of a number of import and deletion operations and while they don't hurt your database, they clutter it up and make it run slower than it could.
- **Fix Report helper file ID's:** This script updates ContactReports and LogReports IDs. This may be needed after importing contact or log records.

- **Update Seasonal addresses:** This script updates the current primary contact location based on seasonal address data entered into the contact's address record. It is used to update "seasonal addresses" prior to running reports (for example, batches of mailing labels).
- **View Developer Scripts:** This button will bring up another set of scripts which are more for developers, but are all safe to run.

ADMIN>Maintenance Scripts>View Developer Scripts

provide a number of utility scripts that help developers (and administrators) determine the state of their ebase data. Many of these scripts simply report inconsistencies that can be fixed using other scripts.

- **Delete All Contact and Log data** - deletes all contact records in ebase. This script is designed for deleting all sample or practice data before you start to use ebase "for real." **USE THIS WITH EXTREME CARE!**
- **Check Log Report:** This script checks that each record in LogReports has a valid _kContactID and _kitemID and that LogReports.200 is properly up to date. This is much faster than just rebuilding it.
- **Check Contact Report:** This script checks that each record in Contact Reports has a valid _kContactID and that ContactReports.200 is properly up to date. This is much faster than rebuilding it.
- **Check Links:** Checks the Links.200 file to make sure that all links between Contact records are properly recorded. It also checks ChildType, ParentType and reciprocal ID.
- **Fix Links:** Fixes all Link.200 records. Be extremely careful when running this – it will DELETE link records whose Child or Parent contact record no longer exists. Other inconsistencies will also be fixed.
- **Check Log Entries against CodeGen:** This script checks all the log entries against CodeGenerator values.
 - Note that this script just checks the Fast Find fields in Log.200, and not those in Contacts.200. Thus even if this script says that everything is up to date, it doesn't mean the 'Update Log and Update Fast Find Fields' maintenance script doesn't have to be run.
- **Fix Fiscal Year:** This script offers a couple options to update the Fiscal Year fields in log entries. When the fiscal year setup information is changed, it does not change any fiscal year information in existing log entries. This script can be used to force a recalculation of fiscal year for all log entries. It also can be used to fill in the Fiscal Year information for log entries that have blank Fiscal Year values (this can happen during import).
- **Toggle single user/multiuser:** This should be used for development testing only. It is NOT useful for setting up a multi-user ebase configuration.
- **Resize windows:** This resizes all ebase windows to their Win/Mac window size settings. Particularly useful for Macintosh users.
- **Open all databases:** This opens all ebase databases. Useful for developers.
- **Clear Maint Script Histories:** This script will simply clear the history of when the maintenance scripts were run. It is really only useful for developers that wish to provide a 'clean' new build.

DISASTER MANAGEMENT

Damaged Files: DO NOT RECOVER! Restore from Backup

To address problems caused by damaged files, FileMaker Pro provides two built-in mechanisms for restoring damaged databases:

- AutoRepair - occurs when the file is opened.
- Recover - is a command you choose from the File menu.

CAUTION! DANGER: The FileMaker "Recover" function sometimes fails to accurately recover data, resulting in problems.

It is far safer to backup frequently and restore from those backups.

There are rare but real instances where the FileMaker "Recover" function does not correctly recover damaged databases. It's difficult to tell when this occurs. Often the only symptoms that a problem has occurred are inexplicable problems showing up over time in the performance and reliability of the database.

It is preferable to restore the damaged files from the appropriate backup than to attempt a FileMaker Recover.

Why do files become corrupted?

ebase is a collection of several FileMaker Pro files. Typically, several of these files are open at any one time, and it is possible for all files to be open at the same time. If the system is shut down abnormally, or if you are sharing one or more of the files across a network and the client shuts down abnormally (or a network connection fails to respond in an appropriate amount of time), one or more of these files can be damaged.

The most frequent cause of file damage occurs when a FileMaker Pro file or ebase is either not closed properly or gets damaged during a computer crash. Anything that interrupts FileMaker processes to complete transactions or close files may corrupt or damage those files.

Files are not closed properly when a file is open and then...

- External power is interrupted, shutting down the computer abruptly
- FileMaker Pro or the ebase run-time application runs into a problem and presents a dialog that requires the user to quit the application (for example, disk-read error or file-damaged error)
- Another application (or the system software) crashes, causing FileMaker Pro or ebase to crash
- FileMaker Pro freezes, forcing a manual restart of the computer
- A manual restart is made for some other reason
- In all of these cases, not only is the active file damaged by being improperly closed, but so are all unlocked local files that may have been open at the same time. Files opened across the network from a still-powered remote computer are not damaged because the remote FileMaker Pro application is still open
- Other causes of problems with FileMaker Pro databases are:
- Media failures (for example, hard disks), where a file cannot be read by the file system

- Network failures, which disrupt communications between the FileMaker database acting as a server, and clients who are accessing the server database

NOTE: Always close your ebase files properly by going to MAIN MENU-->QUIT.

Alternatively, if you are using FileMaker Pro (and not the runtime version of ebase), you can click on File-->Exit (or Quit) in the FileMaker Pro menu at the top of your screen.

How to avoid file corruption

Your best protections against data loss are damage prevention and recovery preparation.

You can help prevent file damage by being careful to:

- Avoid "freezing" your computer (for example: do not have too many applications running at the same time, or have ebase open when you are having network problems that occasionally "freeze" your computer).
- Prevent FileMaker or ebase from abnormally terminating (for example: do not use incompatible printer drivers such as drivers for HP LaserJet 5 and above); and avoid turning your computer off before you've closed all running applications.
- Avoid running ebase over networks that you know are malfunctioning.
- Avoid running ebase on computers that are prone to crashing.

You can prepare for recovery in the event of file damage:

- You can be prepared for file damage (and laugh in the face of disaster) by regularly and frequently backing up your ebase databases. You should backup ALL of your ebase files every day that you make changes to ANY of them. It doesn't hurt to do a daily backup (particularly if it is automated), and then another one at the end of each week. It's also a good idea to do an additional weekly archival that gets stored outside your office. This practice has helped organizations who depend on their lists survive disasters like fires, floods, earthquakes, equipment theft, employee mischief, etc.
- Make sure your computer is run through a monthly maintenance routine (disk defragmented and tested, memory / logic board checked for errors). This will minimize the likelihood that a computer problem will result in an ebase data problem.

VIRUS PROTECTION

It is always wise to install an antivirus utility program on your hard drive, especially if you are opening attached documents from your email client or downloading files from the Internet. Antivirus programs can then alert you if a "foreign" element is trying to make its way to your hard drive to corrupt your files. Antivirus programs also have ways of recovering most of your system files.

In addition to installing an antivirus program, you will also have to make sure you install the virus updates frequently (available from the vendor) to protect your hard drive from new "strains" of viruses. Of course, you should not only rely on antivirus programs to protect your files. You should also be backing up your files periodically (see help topic "Backup ebase Frequently !!!") as another method of protecting your files.

The following are some popular antivirus programs and their websites:

- Norton SystemWorks 2.0 (see <http://www.symantec.com/>)
- Norton antivirus (see <http://www.symantec.com/>)

- McAfee Virus Scan (see <http://www.mcafeestore.com/>)
- PC-Cillin (see <http://www.touchstonesoftware.com>)

Chapter 15 Thank you responses	1
Single Thank You letters.....	1
Thank you “required” OR not.....	1
“THANK YOU SENT?” IS Date stamp modifiable.....	1
One-at-a-time thank yours.....	2
Setting up a template	3
Bulk thank yours.....	3

Chapter 15 Thank you responses

Sending the right thank you to the right person at the right time is a very important job for any organization. ebase helps you handle this in several ways, from sending a single email to printing a batch of form letters and many places in between.

NOTE: Remember, as part of your thank you routine to indicate either by adding a log entry or from the payment log entry thank you fields to mark in ebase that a thank you was sent. Few things can create that sinking feeling in your stomach than seeing a big list of people when you don't know if they've been thanked for their gift!

There are two basic paths to producing standard thank you letters—singly and batch. Both are explained below.

SINGLE THANK YOU LETTERS

If you need to send out a thank you to one person, the easiest way to do it is directly from the payment data entry screen.

When you enter a new payment, there is an area in the middle left-hand section of the screen with several fields that will help you manage your thank you letters.

The screenshot shows a portion of a software interface. At the top, there are two labels: "Thank you sent?" and "Required?". Below "Thank you sent?", there is a dropdown menu with the options "No" and "Yes". To the right of the dropdown is a blue rectangular button labeled "Send Thank You". Below this section is a horizontal line. Underneath the line, the word "NOTE" is written in a bold, black, sans-serif font.

Thank you “required” OR not

By their own choice, some donors do not wish to receive a thank you. For example, the donor may be a foundation who does not want a formal receipt. Use the field “Required?” to indicate whether or not a thank you should be sent: Enter “Yes” if a thank you is required, and “No” if it isn’t. Entering the appropriate value in this field will allow you to honor the wishes of your organization’s constituents.

“THANK YOU SENT?” IS Date stamp modifiable

When you send a thank you, you have the option of letting ebase automatically fill the “Thank you sent?” field with the current date. However, this date can be changed. You may type in any date that fits your needs. For example, you may be cleaning up older data and know that a thank you was sent but not recorded. In this instance you can replace the blank date with the correct one.

One-at-a-time thank yous

Each of the choices below sends or prints a single thank you for the related payment. Here are your choices:

- send an email thank you from within ebase
- send data to a template and print within ebase
- export data to a form letter

Steps:

1. Click on “Send Thank You” to start the process.
2. Choose a salutation type (preferred, formal, informal)
3. Select a receipt format (email, template, word merge)
4. Follow the steps below for each format type:

Steps for email:

1. Select “email” from the receipt format pop-up box.
2. Choose from the list displayed. (See below for how to set up your email templates.)
3. Fill out the form and either Send or Cancel.

Steps for template:

1. Select “template for printed receipt” from the receipt format pop-up box.
2. Choose a template from the list. (See below for how to create new templates)
3. Fill out the form, which is partially pre-populated with information from Admin>Setup and partially from the donor record.
4. Choose either Print or Cancel.
5. You will then be asked if you “want to print an envelope as well”. Click on Yes if you do.
6. Next, you will be asked if you “want to record this receipt as a log entry”. Click on Yes if you do and a “Thank You Donation” log entry will be created for the current contact.

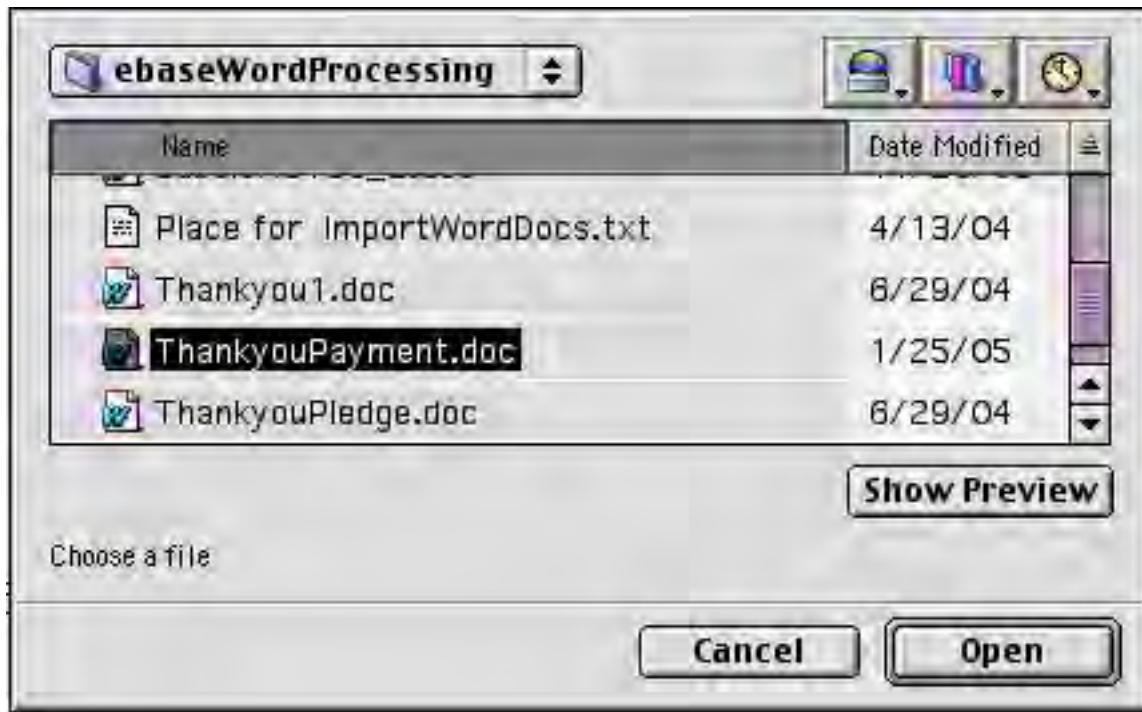
Please note that the “Thank you sent?” area will automatically be changed to “yes” and the date box will automatically be filled with the current date.

Steps for word merge:

1. Select “word merge document” from the “Select receipt format” pop-up box.
2. You will see the “Record Receipt” pop-up box which will ask you if you want to “mark this entry as having a receipt”. Click on “yes” if you want the current date to be written in the “thank you sent” date box.
3. Next, you will be asked to locate the merge template you wish to use for the receipt (see picture below).
4. Open the appropriate form letter. After you do, you will receive 2 pop-up boxes that will “ask” your permission to run the SQL commands that are necessary to produce the merge document. If you wish to continue, click on “yes” when prompted.
5. The thank you letter should appear on the screen, ready to go!

Once the form letter has been selected, ebase sends a merge file (Thank You.mer) to the folder and opens the letter.

NOTE: If ebase complains that it can't find the Thank You.mer file, your export has not disappeared—this message means that ebase cannot locate the .mer file in the default “ebasewordprocessing” folder. Continue to look for it, starting with the FileMaker Pro folder.



Setting up a template

You start to create a receipt template in ADMIN>Codes. Let's say you have a "Each One Reach One board member" campaign and you want to be able to mail a special thank you to anyone who donates to the campaign. The first step in creating a template for this is to create a new Communications code called "Each Reach thank you."

During the creation process you have the chance to set many Optional Settings. Under B) Payment/Pledge Management click in the checkbox Receipt Template? Then click on the blue Setup wording to the left of the checkbox. This is where you create the body of your thank you. The donor's address information is automatically filled in during the actual production of a thank you receipt.

BULK THANK YOUS

When running a campaign, doing bulk thank you letters is very efficient because sending the same thank you to a large group through a mail merge, cuts down your time.

Steps:

1. Do a find for the group to receive the thank yous. For example, everyone who made a new dues payment from 4/1/05 to 4/15/05.

2. Export the data through one of the ebase Reports, such as Membership>Member Renewal, Export (automatically includes fields like "Last Mbr Pymt" and "Mbr Expire Date") or Contact>Contacts Custom Export (which allows you to add a log entry as part of the process) to the Thank You folder which also houses your Thank You letters.
3. Open the applicable form letter and browse to find the correct data file.
4. Print the letter.
5. Last but not least, if a **log entry** has not been added as part of the export process, add the appropriate log entry. Few things are worse than looking back at last month's donors and not knowing whether any thank you letters have been sent!

ebasePro Glossary

Bucket: ebase lingo for a “field,” which is a place to hold a specific chunk of data. In ebase, each code is represented by 8 buckets (fields). Data entered in each bucket is used to categorize log entry data that is “assigned” to contact records in ebase.

Client: A user or computer that accesses data in a database.

Code: 1. Any record in Code Generator.200. Codes provide important details for the creation, use and organization of log entries, including their title, display and edit layouts. Code definition also determines whether or not and how a log entry will integrate with specific ebase features such as membership and email. 2. A specific CodeGenerator.200 record identified by the combined values of the 8 "bucket" fields available for defining each code.

Core: ebase application files that are replaced when upgrading to a newer version of ebase. ebase is composed of a number of FileMaker files that work together in concert. Some of these files are, by design, core files and some are not. Customizations to non-core files will be retained when an upgrade is applied. Customizations to core files will be lost when you upgrade. The core files include *CodeGenerator*, *ContactLocations*, *Contacts*, *ebase*, *FoundSet1*, *FoundSet2*, *Links*, *Locations*, *Log*, *Lokey*, *Main*, *Menus*, *Navigator*, and *VLists*.

CoLo: ContactLocation. A reference to the ContactLocation database which stores location and organizational role information about a Contact. “CoLo” is often used as shorthand to refer to the ContactLocations.200 file.

Customization: Modifying the ebase software (adding new features or changing how existing features work, changing layouts, etc.).

Configuration: Using standard ebase features, such as editing parameters and adding codes to set up ebase to do what you want it to do.

Data: Data is electronically recorded pieces of information. In the database context, these pieces of information are organized for many purposes, including analysis and as a basis for decision-making. In ebase, for example, information is collected about contacts: families, individuals and organizations. One example of a piece of data is the Contact Name.

Database: A database is a collection of data who’s overall purpose is to record and maintain information and organized so that its contents can easily be accessed, managed, and updated. **DBA:** Database administrator. Someone charged with the function of managing all aspects of operating a database including: developing input and data management guidelines and policies, training users, performing system and data administration, and ensuring that the data is routinely backed up to a “safe” location.

Dup check; dup: To avoid various problems, each Contact (whether individual, family, or organization) should have only 1 record in ebase. Based on criteria that you specify, a “dup check” compares records in your ebase database to make sure that this is the case. “Dup” is shorthand for saying that more than 1 record exists for the same contact.

DNS: Domain name server. A machine that translates internet protocol addresses into their text equivalents. For example: 127.0.0.0 may get translated into localhost.yourdomain.org

ebaseClassic: ebase version 1.x. The first version of ebase designed for small, advocacy oriented grassroots organizations with less than 5 full time staff.

ebasePro: ebase version 2.x ebasePro is community relationship management system designed for medium-sized nonprofits (more than 5 full time staff) who need an easily customizable and upgradable data management platform .

Field: A place to store a specific piece of data in a database. **Note:** field labels that you see on the screen when editing data don't necessarily correspond to field names in the underlying database, which you see when exporting/importing data.

FileMaker Pro: Database software distributed by FileMaker, Inc. used to run ebase database templates. Required for use on client machines in multi-user settings and for customization of ebase. For more information on FileMaker Pro, see <http://www.filemaker.com>

FileMaker Server: Software used to host FileMaker databases to allow multiple users to access shared databases. Optimized for network transactions and includes the ability to automatically backup hosted databases.

Flag: To "tag" or mark a record for a specific purpose. "Flag" fields typically use two values (plus a null value) to indicate something. In FileMaker Pro, most "flag" fields are defined as yes/no, true/false, or 1/0 fields. Keep in mind with flag fields that "No" and " ", i.e. blank, are two different values.

Found Set: The "found set" is the set of records (names or entries) you get when you run a "find" in ebase. The number of records in your found set is always displayed on the third line of the metadata bar at the top right of the Individual Overview screen.

Host: A computer that "allows" other computers to access its resources. A resource can be data or it can be a computer program.

IP address: A four "bucket", unique number that identifies a specific machine or network. For example: 127.0.0.1 is a number typically assigned to a computer located on a TCP/IP network that does not assign its own IP addresses.

ISP: Internet service provider. A company that provides access to the internet and to internet services like POP3 and SMTP.

Log entry: Customizable records that show the organization's relationship to other people and organizations. Similar to a ship's log or diary.

Navbar: A term used to refer to the left-hand navigation bar in the ebasePro interface.

OS: Operating system. For example Windows XP Pro or Mac OS 10.x

PCL: Primary contact location. The default physical location for a contact.

POC: Primary organizational contact. The name of a person who acts as the primary contact for an organization.

POP3: Post Office Protocol 3. A TCP/IP protocol that describes how to distribute email to network users.

Portal: A FileMaker Pro interface convention that lets you see all the data, regardless of which file it is located in, that is related to a specific contact. Portals are used extensively in ebase to link data. For example, the entries window in CONTACT>Overview is a portal that looks into LOG and displays all the entries associated with the current CONTACT record.

Runtime engine, runtime: A piece of software that enables a user to use another piece of software for free. ebase ships with a FileMaker Pro runtime engine that lets people use the ebase templates without having to purchase a copy of FileMakerPro.

Server: A computer that “hosts” data and “presents” it to “client” computers.

Solicitation: Another name for a “campaign” of some sort. An ebase solicitation is the “ask” communication meant to prompt some sort of response by a constituent.

SMTP: Simple Mail Transport Protocol. A TCP/IP protocol that describes how to relay email messages from one network on the internet to another.

Soft-Credit: When an organization receives a corporate donation through the help of someone connected with the business, usually an employee, the organization may show the connection with a “soft-credit” to the employee.

Table: A collection of fields with related data. For example: a table might contain all of the 2-character abbreviations for the states and the name of the state. Tables are comprised of rows, columns and cells. These correspond to the terms used by FileMaker Pro: records, fields, record fields. A spreadsheet is an example of a table.

Taxonomy: A system for classifying and categorizing a group of objects that highlights the objects' similarities and differences. The 8 "bucket" fields in CodeGenerator.200 provide a place for establishing a taxonomy of Code records. This makes it easier to manage a complex set of Codes and their associated Log entries.

TCP/IP: Transmission Control Protocol/Internet Protocol. A series of agreements and practices ratified by the Internet Engineering Task Force (IETF - <http://www.ietf.org>)--a nonprofit organization--that govern how different computers can share information using a variety of networking technologies.

Wisdom: The ability to discern when your knowledge does not transform data into information.

APPENDIX A

ebase 2.20 - LAYOUTS USED IN THE CREATION AND EDITING OF CODES

ebase® Layouts for Log Codes in ebase v. 2.20

last edited 10/17/06

WHAT IS A LAYOUT?

In FileMaker, a layout is a page that allows you to view and edit your data. ebase provides several layouts for you to use to enter or view entry information when adding an entry to a contact or viewing a previously added entry.

WHAT IS THE DIFFERENCE BETWEEN EDIT AND VIEW LAYOUTS?

Every log entry added to a contact is based on a generic code that the ebase administrator has created. Each code has two layouts assigned to it: the layout used to enter data into ebase (usually an “edit” layout) and the layout used to view data that is already entered in ebase (usually a “view” layout). The database administrator has control over which layouts are assigned to a code.

Many “view” layouts have a button labeled “Admin Edit” that allows you to edit entry information after the entry has been added to a contact. This button will only work if the user is logged in as an administrator. This feature provides some level of security by preventing non-admin users from changing entry information without the administrator’s approval. (Note: non-admin users can still add entries to a contact, they just can’t edit the entry data once it is already entered.)

LAYOUT NAMING CONVENTIONS

Layouts are named based on the type of information they allow the user to enter and whether they are an “edit” or a “view” layout. Each layout is numbered so that it will show up in drop-down lists. The numbers are a workaround for a FileMaker limitation, and do not have any other significance.

NOTE: The naming syntax has not been standardized yet—some layouts use semicolons, some use commas, some have spaces, some do not. If you are creating your code set outside of ebase and plan on importing it to ebase, it is important to use the exact layout names—semi-colons and all. When using the Code Tutorial or Code Generator pop-up lists to assign layouts, you need to worry about this—the list is correct.

WHEN CREATING YOUR CODE SET

Think about the type of information you want to record, then select from the list of pre-existing layouts the best fit for the job.

NOTE: If you customize the pre-existing layouts, keep in mind that software updates will cancel out any customizations. You have the choice of re-doing the customizations after you have updated, or creating a custom layout that is not part of the ebase core files. If you need to add a custom layout, please contact an ebase2.0 consultant or ask on the ebase2 support email list (See the Community section of www.ebase.org for information on ebase 2.0 consultants and the support list).

EBASE 2.20 – LIST OF LAYOUTS USED FOR EDITING/VIEWING CODE CODES

1. Payment Edit;1
2. Payment View;2
3. Payment Pledge View; 3
4. Payment Pledge Edit; 4
5. NM Payment Edit; 70
6. NM Payment View; 71
7. Action Edit; 5
8. Pledge Edit; 6
9. Pledge View; 7
10. Prospect Edit; 8
11. Note Edit; 9
12. Note View; 10
13. Purchase Edit; 11
14. Communication Edit; 12
15. General View; 13
16. General Edit; 14
17. Custom; 15
18. Inkind View; 16
19. Inkind Edit;17
20. Email;18
21. EmailReview;19
22. Action View; 20
23. GroupEmailReview; 21
24. EmailProcessing; 22
25. METAFLAG View;23
26. MetaFlag Edit;24
27. ReceiptEdit; 25
28. ReceiptView; 26
29. Time Edit;27
30. Time View;28
31. SubscriptionEdit; 29
32. SubscriptionView; 30
33. Text Field Edit;73
34. Text Field View;74
35. Availability Edit;75

EDIT PAYMENT FOR AARON CHUMRAU

Payment

PAYMENT INFORMATION

Amount	DatePosted	InvoiceID
9/10/2006		

Description of Log Entry

PaymentMethod	Check #	Acct Entity	Acct Code

Pay. Authorization Code: Authorized By:

--	--

NonDeductAmt DeductAmt

--	--

Credit in FY Calc FY Stored FY

Current	2006	Update FY	2006
---------	------	-----------	------

From Solicitation

--

Unique Code [Soft Credit To:](#) [Remove Credit](#)

--

[Add Solicitor:](#) [Remove Solicitor](#)

NOTE

[To View only](#)

Layout Name: Payment Edit,1

Used For: Recording a payment.

Special Features: Can be used for sending a receipt.

Automatically calculates date posted.

One click button allows you to calculate membership start date, grace period and expiration date based on default membership period.

Automatically calculates deductible amount from nondeductible amount and total payment.

Allows you to associate the payment with a solicitation that generated the payment.

You can assign this item to another ebase user for action.

Records:

Amount, Date posted, Invoice ID, Description of log entry

Payment method, Check number, Acct Entity, Acct Code

Payment authorization code, Authorized by, Non-deductible amount

Credit in Fiscal Year, Solicitation that generated payment

Unique code (from solicitation that generated payment)

Soft Credit To, Payment note, Membership type

Start date for dues, Period of membership, Grace period

Expire Date, Payment status, Thank you sent date

Assigned to, Contact by date, Problem

Date contacted

Calculates: deductible amount, expiration date, member status, receipt generated, grace expire, last expire payment note, assigned to, contact by date, date contacted, problem

VIEW PAYMENT FOR AARON CHUMRAU

Payment

PAYMENT INFORMATION		
Amount	DatePosted	InvoiceID
9/10/2006		
Description of Log Entry		
PaymentMethod	Check #	Acct Entity
Pav. Authorization Code:	Authorized By:	
NonDeductAmt	DeductAmt	Credit in FY
		Current
FY		2006
From Solicitation		
Unique Code "Soft" Credit To:		
Solicitor:		
NOTE		
<div style="height: 100px; border: 1px solid black;"></div>		

DUES / SCHEDULED PAYMENT

Membership type		
DateStart	Period/Unit	GracePeriod
Period(s)		
Expire Date	Member Status	
Grace Expire		

Thank you sent? Required? No
 No [Send Thank You](#)

TO DO

AssignedTo	Contact by	Problem?
		No
Date Contacted		
<div style="height: 50px; border: 1px solid black;"></div>		

[Admin Edit](#)

Layout Name: Payment View,2

Used For: Viewing a payment.

Special Features: "Admin Edit" button allows users logged in as administrator to edit the payment information.

Users can assign this item to another user.

Users can mark this item as a problem.

Aside from above exceptions, users cannot edit any data using this layout.

Records:

See as "Payment Edit" screen

Calculates: N/A

VIEW PLEDGE PAYMENT FOR PLEDGE DRIVE FOR AARON CHUMRAU

Payment on Pledge
Pledge Building Fund

PLEDGE PAYMENT INFORMATION			
Amount \$150.00	DatePosted 1/2/2006	InvoiceID <input type="text"/>	
Description of Log Entry <input type="text"/>			
PaymentMethod <input type="text"/>	Check# <input type="text"/>	Acct Entity <input type="text"/>	Acct Code <input type="text"/>
Pay. Authorization Code: <input type="text"/>		Authorized By: <input type="text"/>	
NonDeductAmt <input type="text"/>	DeductAmt \$150.00	Credit in FY <input type="text"/>	FY 2006
From Solicitation <input type="text"/>			
Capital campaign ask, visit <input type="text"/>			
Unique Code <input type="text"/>	Thank you sent? <input type="checkbox"/>	Required? <input type="checkbox"/>	Send Thank You
NOTE <input type="text"/>			
TO DO Assigned To <input type="text"/> Contact by <input type="text"/> Problem? <input type="checkbox"/> No Date Contacted <input type="text"/>			
Admin Edit			

Layout Name: Payment Pledge View, 3

Used For: Viewing a payment made on a pledge.

Special Features: "Admin Edit" button allows users logged in as administrator to edit the payment information.

"Send Receipt" link allows users to generate a receipt for the pledge. Users cannot edit data using this layout.

Records: N/A

Calculates: Receipt generated. (fills in date when receipt is generated.)

EDIT PLEDGE FOR PLEDGE DRIVE FOR AARON CHUMRAU

PLEDGE BUILDING FUND

1) Click on the pledge to match with this pledge payment:

Pledge Building Fund P	Date: 12/29/2006
Amount:\$500	Bal.:\$350
Pledge Building Fund P	Date:
Amount:\$25	Bal.:\$25

NOTE

TO DO
Assigned to: Target Date: Problem? No
Date Contacted: [View Only](#)

2) Enter payment information:

Amount	DatePosted	InvoiceID	
\$150.00	1/2/2006		
Description of Log Entry			
PaymentMethod	Check #	Acct Entity	Acct Code
Pay. Authorization Code:		Authorized By:	
NonDeductAmt	DeductAmt		
	\$150.00		
Credit in FY	Calc FY	Stored FY	
	2006	Update FY	2006
From Solicitation			
Capital campaign ask, visit			
Unique Code	Thank you sent?	Required?	
	No		Send Thank You

DETAILS: Pledge Building Fund

Date Start	Amount	# Payments	Amt. Per Payment
12/29/2005	\$500.00	4	\$125.00
Payments Made			
1/2/2006	\$150.00		\$350.00
		Due Date:	Total Paid
		12/29/2006	\$150.00
			View Pledge

Layout Name: Payment Pledge Edit; 4

Used For: Recording and editing a payment made on a pledge.

Special Features: Clicking on the pledge title allows you to associate the payment to a specific pledge and automatically calculates the number of payments left.

Can associate the payment to a solicitation.

Records: Date Posted

Invoice ID

Amount

Nondeductible amount

Fiscal year

Payment method

Solicitation

Notes

Calculates: Number of payments left

period, payments made remaining

amount

number of payments

amount per payment.

EDIT DONOR PAYMENT FOR AARON CHUMRAU

NM Payment

Amount	DatePosted	InvoiceID			
<input type="text"/>	9/10/2006	<input type="text"/>			
Description of Log Entry					
PaymentMethod	Check #	Acct Entity	Acct Code	Pay. Authorization Code:	Authorized By:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NonDeductAmt	DeductAmt	Credit in FY	Calc FY	Stored FY	
<input type="text"/>	<input type="text"/>	Current	2006	Update FY	<input type="text"/>
From Solicitation		Unique Code			
"Soft" Credit To:		Remove Soft Credit			
Add Solicitor:		Remove Solicitor			
Thank you sent?		Required? <input type="checkbox"/> No		Send Thank You	
<input type="checkbox"/> No		<input type="checkbox"/>		To View only	
NOTE					
<div style="border: 1px solid black; padding: 5px;">TO DO Assigned To <input type="text"/> Contact by <input type="text"/> Problem? <input type="checkbox"/> No <input type="text"/> Date Contacted <input type="text"/></div>					

Layout Name: NM Payment Edit, 70

Used For:

Special Features:

Records:

Calculates:

VIEW DONOR PAYMENT FOR AARON CHUMRAU

NM Payment

Amount	DatePosted	InvoiceID			
	9/10/2006				
Description of Entry					
PaymentMethod	Check #	Acct Entity	Acct Code	Pay. Authorization Code:	Authorized By:
NonDeductAmt	DeductAmt	Credit in FY	Calc FY	Stored FY	
		Current	2006		
From Solicitation		Unique Code			
Soft Credit Name					
Solicitor Name					
Thank you sent?		Required? <input type="checkbox"/> No		<input type="button" value="Send Thank You"/>	
No				<input type="button" value="Admin Edit"/>	
NOTE					
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>					
TO DO					
Assigned To		Contact by	Problem?		
			No		
Date Contacted					

Layout Name: NM Payment View, 71

Used For:

Special Features:

Records:

Calculates:

EDIT ACTION FOR AARON CHUMRAU

Assisted with Gala02

Date Posted 9/10/2006	Credit in FY Current	Calc FY 2006	Update FY	Stored FY 2006
Time in hours	Hourly Rate	Value of Action \$0.00	Text5: <input type="radio"/> Other...	
Description of Log Entry				
Thank you sent?		Required? No		
No		Send Thank You		
From Solicitation				
Note				
Priority	Assigned To	Contact by	Date Contacted	Mark as Problem? <input checked="" type="radio"/> No <input type="radio"/> Yes
View Only				

Layout Name: Action Edit, 5

Used For: Entering actions performed for your organization on a pro bono basis. (Not for billing.)

Special Features: Can associate the action to a solicitation that generated that action.

Can assign a monetary value to the pro-bono work.

Records: Date

Time in hours

Hourly Rate

Solicitation Notes

Calculates: Value of Action

EDIT PLEDGE FOR PLEDGE DRIVE FOR AARON CHUMRAU

Pledge for Building Find

PLEDGE COMMITMENT		
Amount	DatePosted	InvoiceID
\$25.00	9/10/2006	12345
Description Will give lots of money		
Start Date	# of Payments	Payment Duration
Today		
\$ Per Payment	End of Pledge Period	?
PaymentMethod <input type="checkbox"/> Recurring		
NonDeductAmt	DeductAmt	Goal
	\$25.00	
From Solicitation	Unique Code	
"Soft" Credit To: Remove Credit		
Add Solicitor Remove Solicitor		
Thank you sent? Required? <input type="checkbox"/> No		
No	Send Thank You	

NOTE

TO DO

AssignedTo Contact by Problem?
 No
Date Contacted
[View Only](#)

Layout Name: Pledge Edit; 6

Used For: Recording a pledge promise.

Special Features: Can associate the pledge to a solicitation that generated that pledge.

Records: Date Posted

Amount pledged

Non-deductible amount

Method of payment

Start date Number of periods in the pledge cycle.

Period (month, week, day, year)

Number of payments

Calculates: Calculated the amount per payment and date end based on the period length (month, year, day), the number of payments and the amount of the pledge.

VIEW PLEDGE FOR PLEDGE DRIVE FOR AARON CHUMRAU

Pledge for Building Find

PLEDGE COMMITMENT		
Amount	DatePosted	InvoiceID
\$25.00	9/10/2006	12345
Description Will give lots of money		
Start Date	# of Payments	Payment Duration
\$ Per Payment	End of Pledge Period	
?		
PaymentMethod		
NonDeductAmt	DeductAmt	Goal
	\$25.00	
From Solicitation	Unique Code	
Soft Creditor Name		
Solicitor Name		
Thank you sent?	Required?	No
No	Send Thank You	

PAYMENT HISTORY		
PaidToDate	PledgeBalance	
\$0	\$25	
TO DO		
AssignedTo	Contact by	Problem?
		No
Date Contacted		
Admin Edit		

Layout Name: Pledge View; 7

Used For: Viewing information on a pledge.

Special Features: Click on "Admin Edit" button to edit the pledge. (Admins only) Users can edit the notes in the pledge, but no other information.

Records: Notes

Calculates: N/A

EDIT PROSPECT EDIT FOR AARON CHUMRAU

Mbr prospect, exchange list A

Priority	AssignedTo	Contact by	Date Contacted

Description

Note

Problem?
 No Yes

Entry Title: M
Entry ID: 6D1
Contact ID: S
SourceCode:
AddDate: 11/
AddTime:
Add by: Fran
Layout: Pros

CONTACT IN
Roberto Bosch
510 Idaho St
Augusta, ME
rbosch@xyz.com

Layout Name: Prospect Edit; 8

Used For: Recording prospect information: i.e. a prospective donor or funder.

Special Features:

Can assign the prospect to an ebase user for further action.

Records:

Priority
Assigned to
Contact by Date
Contacted date
Notes
Problem
Calculates: N/A

EDIT NOTE FOR AARON CHUMRAU

Activist available anytime

Date Posted 9/10/2006	Thank you sent? No	Required? <input checked="" type="checkbox"/> No		
Send Thank You				
Description				
Note				
Priority	Assigned To	Contact by	Date Contacted	Mark as Problem?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> No <input type="radio"/> Yes
View Only				

Layout Name: Note Edit; 9

Used For: Recording a variety of information, such as interests, availability, skills, roles, and solicitations.

Special Features:

Users can assign the prospect to an ebase user for further action. Use the "Go to Contact" button to view the Contact Overview.

Records:

Priority
Assigned to
Contact by Date
Contacted date
Notes
Problem
Calculates: N/A

VIEW NOTE FOR AARON CHUMRAU

Deleted: <sp>

Layout Name: Note View; 10

Used For: Viewing information entered in the Note Edit; 9 layout.

Special Features:

Users can assign the prospect to an ebase user for further action.

Click "Admin Edit" to edit the note. (Admins only.)

Users can mark this item as a problem.

Cannot edit note in this view.

Records:

Priority

Assigned to

Contact by Date

Contacted date

Problem

Calculates: N/A

EDIT PURCHASE FOR AARON CHUMRAU

DatePosted 9/10/2006	InvoiceID	Amount	NonDeductAmt	DeductAmt	PaymentMethod
CheckNumber	Auth. Code:	Auth. By:	Credit in FY Current	Stored FY	
Materials					
Text5:	Quantity	Item Description			
Date Completed					
NOTE					
From Solicitation					
Priority	Assigned To	Contact by	Date Completed	Mark as Problem?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/> No	<input type="radio"/> Yes

Layout Name: Purchase Edit; 11

Used For: Recording purchase of an item from your organization i.e. tickets, t-shirts, books).

Special Features:

Users can associate this purchase to a solicitation..

Records:

Date Posted
Invoice ID (broken at the time of writing)
Amount
Nondeductible amount
Payment method
Check number
Authorization Code
Authorized by
Fiscal Year
Event
Event Quantity
Item
Item Quantity
Payment note
Solicitation

Calculates: Deductible amount.

PHONE CALL FOR AARON CHUMRAU

Deleted: <sp>

Layout Name: Communication Edit; 12

Used For: Recording a communications with the contact that is not related to solicitations. Communications could include thank you letters, newsletters, phone calls, etc. (Use Note Edit; 9 for when entering solicitation entries.) Note that this entry does not need to record the actual text of the communication—but it can. Basically, it records the fact that a communication was sent. However you can add personal notes or cut-n-paste into the Note field.

Special Features: N/A

Records:

Note

Calculates: Code Title and Entry Code bucket structure.

TEMPLATE FOR DEVELOPERS

Deleted: <sp>

Layout Name: General View; 13

Used For: This is a template for developers to use when creating their own codes. It is not meant to be used for active codes.

Special Features: N/A

Records:

Entrynote

Flag or problem

Text1

Text2

Date

Invoice ID

Item duration

Dates

Item amount

Payment authorization code

Payment authorized by

Receipt generated

Calculates: N/A .

TEMPLATE FOR DEVELOPERS

Skill, attorney

Description of Log Entry

Amount	Auth. Code:	Auth. By:	Date Posted	Start Date	End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	9/10/2006	<input type="text"/>	<input type="text"/>
InvoiceID	ItemDuration	ReceiptGenerated?			
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No			
Thank you sent?	Required?	<input type="checkbox"/> No			
No	Send Thank You				
From Solicitation		UniqueCode			
<input type="text"/>					
Note <input type="text"/>					
Priority	AssignedTo	Contact by	Date Contacted	Mark as Problem?	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> No	<input type="radio"/> Yes
To View only					

Layout Name: General Edit; 14 (General Transaction Detail)

Used For: This is a template for developers to use when creating their own codes. It is not meant to be used as is for active codes.

Special Features: N/A

Records:

Itemnote

Flag or problem

Text1

Text2

Date

Invoice ID

Item duration

Dates

Item amount

Payment authorization code

Payment authorized by

Receipt generated

Calculates: N/A

SKILL OR INTEREST FOR AARON CHUMRAU

Skill, attorney

Layout Name: Custom; 15

Used For: This has been replaced by Edit Actions, 5 and is a vestigial form.

Special Features: N/A

Records:

Note

Calculates: N/A

Priority AssignedTo Contact by Date Contacted

VIEW GIFT INKIND FOR AARON CHUMRAU

Purchase video

DatePosted 9/10/2006	InvoiceID	Amount	NonDeductAmt	DeductAmt	PaymentMethod
Auth. Code:	Auth. By:	FiscalYear 2006	Acct Code		
Description of Log Entry					
From Solicitation					
Quantity	HighValue	LowValue	ReceiptGenerated?	Text5: No	
Solicitor	Soft Credit				
Thank you sent?	Required? No	No	Send Thank You		
NOTE					
Priority	AssignedTo	Contact by	Date Contacted	Mark as Problem? <input checked="" type="radio"/> No <input type="radio"/> Yes	
Admin Edit					

Layout Name: Inkind View, 16

Used For: Viewing in-kind donation entries.

Special Features: Can assign the prospect to an ebase user for further action. Allows you to create a personalized receipt with one click. Cannot edit in this layout. Click on Admin Edit to access the edit layout.

Records: N/A

Shows: Date posted

Invoice ID

Amount

Non-deductible amount

Check Number

Authorization code

Authorized by

Fiscal Year

Solicitation

Date start, period and grace period

Payment for and receipt generated

Item

Quantity of item

High and low values of item

Note

Calculates: Deductible Amount, Expire date, status, grace expire and last expire.

EDIT GIFT INKIND FOR AARON CHUMRAU

DatePosted	InvoiceID	Amount	NonDeductAmt	DeductAmt	PaymentMethod
9/10/2006					
Auth. Code:	Auth. By:	Acct Code	Credit in FY	Calc FY	Stored FY
			Current	2006	Update FY 2006
Description of Log Entry					
<p>From Solicitation</p> <hr/>					
Quantity	HighValue	LowValue	ReceiptGenerated?		
			No		
Add Solicitor		Remove Solicitor		Text5:	
"Soft" Credit To:		Remove Credit		<hr/>	
Thank you sent?		Required?	<input type="checkbox"/> No	<hr/>	
No		Send Thank You		<hr/>	
NOTE					
<hr/>					
Priority	AssignedTo	Contact by	Date Contacted	Mark as Problem?	
				<input checked="" type="radio"/> No	<input type="radio"/> Yes
<hr/>					
To View only					

Layout Name: Inkind Edit,17

Used For: Recording information about in-kind donation items

Special Features:

Can assign to user

Can mark as a problem
Allows user to create a non-solving

Allows you to create a personalized receipt with one click.

Allows you to set to default

Records:

Date posted
1 min ago

Invoice ID
A-123456

Amount

Non-deductible
Check Number

Check Number
Authorization code

Authorization

**Authorized
Fiscal Year**

Fiscal Year Solicitation

Date start,

Payment for

Item

Quantity of item

High and low values

Note

Calc

expire.

EMAIL GENERAL FOR AARON CHUMRAU

The screenshot shows a standard email composition interface. At the top left are two buttons: 'Send' and 'Cancel'. Below them are fields for 'Email To' and 'Email From'. Underneath these are fields for 'Email CC (enter as: Name <email@domain.com>)' and 'Email BCC (enter as: Name <email@domain.com>)'. There is also a 'Subject:' field. The main body of the email is contained within a large 'Body' area, which has scroll bars on its right and bottom edges. The entire window is titled 'EMAIL GENERAL FOR AARON CHUMRAU'.

Layout Name: Email;18

Used For: Creating an email to send to a contact. Use this layout for recurring email messages you want to send using ebase.

Special Features:

NOTE: to use this code to send an email to a person, click on the person's email address on the Contact Overview screen.

Records:

CC emails (carbon copy)

BCC emails (blind carbon copy)

Subject

Body text

Calculates: To and from email addresses (based on ebase user email settings and contact email), SMTP host

REVIEW EMAIL GENERAL FOR AARON CHUMRAU

EmailTo aaron@biggame.com	EmailFrom admin@oasis.org	Date/Time 5.6.2002 9:14:42 AM
EmailCC (enter as: Email <email@domain.com>)		EmailBCC (enter as: Email <email@domain.com>)
Subject: email from ebase		
Body test email from ebase		
View Status		

Layout Name: EmailReview;19

Used For: Viewing an email that was sent to a contact, or reviewing an email before it is sent to a contact.

Special Features: N/A

Records: N/A

Shows:

Recipient email

Sender email

cc emails

bcc emails

subject

body

Calculates: date and time sent.

VIEW WORKED ON TABLING FOR AARON CHUMRAU - TEST

Worked on local food tabling

Date Posted
9/10/2006

Time in hours Hourly Rate Value of Action Text5:
\$0.00

Description of Log Entry

Thank you sent? Required? No
No [Send Thank You](#)

From Solicitation

Note

Priority Assigned To Contact by Date Contacted Mark as Problem?
 No Yes

[Admin Edit](#)

Layout: Action View, 20

Used For: Viewing an action for pro-bono work that was taken by a contact.

Special Features: Cannot edit information in this screen. Click on admin edit for administrator access to the edit screen.

Records: N/A

Shows: date action was performed

Time in hours

Hourly rate

Value of action

Fiscal Year

Note

Solicitation

Calculates: N/A

REVIEW EMAIL GROUP

Review email for Dale Pollock

EmailTo: dale@xyz.org EmailFrom: lulubedulu@oasis.org
Subject: Renewal email [View email status](#)

Body

Dear Dale;

Your membership in our organization is due to expire on May 30, 2002.

Please consider continuing your membership with us this year by renewing your membership with us.

Best regards,

The staff at OASIS

EmailFooter

[Empty box]

Layout Name: GroupEmailReview, 21

Used For: Reviewing and editing email that will be sent to a group

Special Features: Shows the email as it will be sent, automatically filling in merge fields. Merge fields and template text from this email can be changed by editing the code associated with the layout. You cannot edit the footer in this layout. Footer is edited in ebase user settings..

Note: to use this layout, go to the Email menu on ebase and send from there. You do not add email entries to contacts like you do all other entries. Click on "View email status" to view the status of the email that is being sent.

Records:

Subject

Body

Calculates: N/A

EMAIL PROCESSING

<u>_kCodeID</u>	HQJVFG2U	<u>_kContactID</u>	VL0H1AHG
Unsubscribed from <input type="text"/>			
Date originally subscribed <input type="text"/>			
Entry	Note	<input type="text"/>	

Layout Name: EmailProcessing, 22

Used For:
Special Features:
Records:
Calculates:

BOARD MEMBER METAFLAG FOR GEORGE MOUA

None

Date 1 Date 2 Date Posted
[] [] 9/10/2006

Description of Log entry
[]

Note
[Large Text Area]

Priority AssignedTo Contact by Date Contacted Mark as Problem?
[] [] [] [] No Yes

[View Only](#)

Layout Name: METAFLAG Edit;24

Used For:

Special Features:

Records:

Calculates:

BOARD MEMBER METAFLAG FOR GEORGE MOUA

None

Date 1 Date 2 Date Posted
9/10/2006

Description of Log Entry

Note

Priority AssignedTo Contact by Date Contacted Mark as Problem?
 No Yes

[Admin Edit](#)

Layout Name: METAFLAG View;23

Used For:
Special Features:
Records:
Calculates:

EDIT THE RECEIPT TEXT

Edit

PRINT

CANCEL

Your payment receipt info:

Staff Name
Your Organization
Your Street Address
City, State, Zip

Phone: 111.111.1111

Fax: 111.111.1111

Contact Address Label:

Frank Gonzalez
348 Erie Street
Binghamton, NY 13905

Receipt body (you can edit this):

Edit this layout

**Used For:
Special Features
Records:
Calculates**

VIEW RECEIPT

BACK

Staff Name
Your Organization
Your Street Address
City, State, Zip

Phone: 111.111.1111
Fax: 111.111.1111

Aaron Chumrau
116 Cardinal Street
Springfield, IL 62746

Layout Name: ReceiptView; 26

Used For:
Special Features:
Records:
Calculates:

September 10, 2006

EDIT TIMEEDIT FOR GEORGE MOUA

Date Posted 9/10/2006	Add Solicitor	Remove Solicitor	Acct Entity	Acct Code
Time Start	Time End	Hours (decimal format)	Text5:	
		plus		
Time Total	Rate	DiscountRate	TimeXRate	TimeXRateXDiscount
			\$0.00	\$0.00
Thank you sent? Required? <input type="checkbox"/> No				
No Send Thank You				
Description <input type="text"/>				
From Solicitation <input type="text"/>				
Note: <div style="border: 1px solid black; height: 100px; width: 100%;"></div>				
Priority	Assigned To	Contact by	Date Contacted	Mark as Problem? <input type="radio"/> No <input checked="" type="radio"/> Yes
To View only				

Layout Name: Time Edit;27

Used For:

Special Features:

Records:

Calculates:

VIEW TIMEEDIT FOR GEORGE MOUA

Date 9/10/2006	Solicitor	Acct Entity	Acct Code
Time Start	Time End	Hours (decimal format)	Text5:
		plus	
Time Total 0.00	Rate	DiscountRate	TimeXRate \$0.00
TimeXRateXDiscount \$0.00			
Thank you sent?		Required? <input type="checkbox"/> No	
No		Send Thank You	
Description <hr/>			
From Solicitation <hr/>			
Note: <div style="border: 1px solid black; height: 150px; width: 100%;"></div>			
Priority	Assigned To	Contact by	Date Contacted
			<input checked="" type="radio"/> No <input type="radio"/> Yes
Admin Edit			

Layout Name: Time View;28

Used For:

Special Features:

Records:

Calculates:

EDIT SUBSCRIPTION FOR AARON CHUMRAU

Date Start	Date End	Date Posted 9/10/2006		
Note				
Description <input type="checkbox"/> Other...				
Priority	Assigned To	Contact by	Date Contacted	Mark as Problem?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="button" value="To View only"/>

Layout Name: SubscriptionEdit, 29

Used For:
Special Features:
Records:
Calculates:

VIEW SUBSCRIPTION FOR AARON CHUMRAU

Date Start	Date End	Date Posted		
9/10/2006				
Description				
Note				
Priority	Assigned To	Contact by	Date Contacted	Mark as Problem?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> No <input type="radio"/> Yes
Admin Edit				

Layout Name: SubscriptionView, 30

Used For:

Special Features:

Records:

TEXT FIELD EDIT

Description of Log Entry						
<input type="checkbox"/> Other...						
Text1: <input type="text"/>						
Text2: <input type="text"/>						
Text3: <input type="text"/>						
Text4: <input type="text"/>						
Note <input type="checkbox"/> Other...						
Priority	AssignedTo	Contact by	Date Contacted	Mark as Problem?	<input type="radio"/> No <input checked="" type="radio"/> Yes	To View only
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="To View only"/>

Layout Name: Text Field
edit;73

TEXT FIELD VIEW

Description of Log Entry

Date Posted
9/10/2006

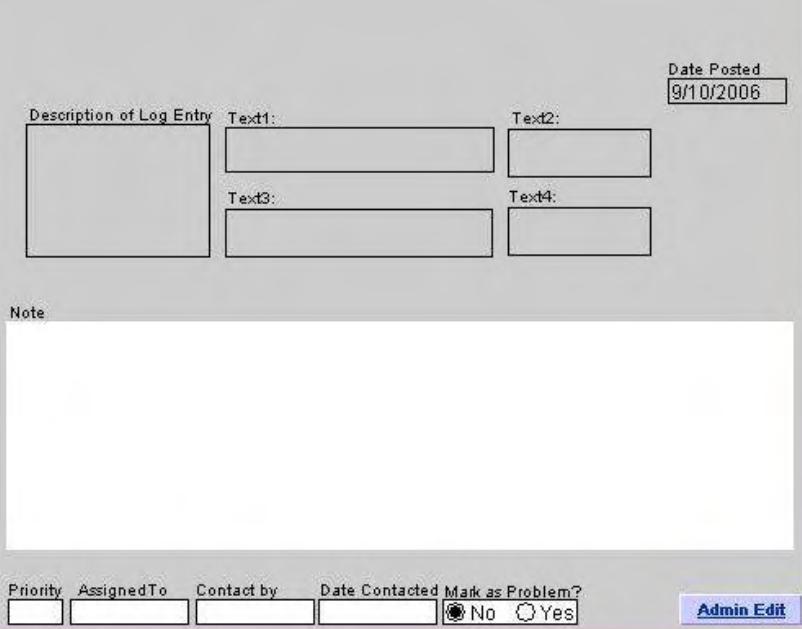
Text1:	Text2:
Text3:	Text4:

Note

Priority AssignedTo Contact by Date Contacted Mark as Problem?

No Yes

[Admin Edit](#)



TEXT FIELD VIEW;74

AVAILABILITY EDIT

Priority	AssignedTo	Contact by	Date Contacted
Availability (format like this: 7:00AM-3:15pm)			
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			
Text4: <input type="checkbox"/> Other...			
Note <div style="border: 1px solid black; height: 40px; width: 100%;"></div>			

Date Posted: 9/10/2006

Mark as Problem? No Yes

Availability Edit;75