Lesson 6 –
Entering Mailing Groups in the Database

In this lesson, you will learn how to:

- Enter Mail Groups Members
  - Open the Mail Groups Screen
  - Find a Member
  - Sort a Record
  - Delete a Record
  - Add a New Record
  - Enter Data In A Record
  - Enter New Mailing Group
  - Group Enroll
All programs begin with the *Extension Database (ED) Main Menu*. You have learned in Lesson 1 how to open *ED*; now you will need to know how to enter *Mail Groups* data. We will use the *Mail Groups* section for this lesson. To begin entering *Mail Groups* you will need to be at the *Mail Groups* screen.

Although you can enter CFS, 4-H, and ANR member demographic data in their own *General Info* screen you may also enter their data here. However, there are some specific fields only available via their respective (4-H, CFS, and ANR) *General Info* screens that will need data entered. You will need to go to those screens to enter that specific data.

**Opening the Mailing Groups Screen**

Click on the **Mailing Groups** button on the main menu. The Mailing Groups screen shown below is displayed.
Finding a Member (Always the First Step)

You need to use the Find procedure on every person/family you intend to edit or add to the database. Using the Find procedure ensures that the person is not already in the database before you enter them as a new user. This also ensures that data on people you want to edit is really in the database. You will need to find them to make changes to their information already stored there.

1. Click on the Find button. The Find screen is displayed. Notice you are now in the Find view mode and are restricted to only specific screens.

2. Click in the field you want to do the Find in and type in the needed text. Usually this is the Last (last name) field. For this procedure let’s use Adams.

3. Click on the Continue button found in the left column (the tool palette) of the screen to complete the Find sequence (or press the Enter key on the keyboard).

When the first record is displayed, notice how many records are found. They will be displayed just under the Rolodex in the left column (the tool palette) of the screen.

Notice the Find view mode has automatically changed to the Browse mode. You can now decide to Sort, Add, Duplicate, or Edit.

You can scroll among the records found to see if the person you want to work with is already in the database. Or, you can sort the records to make finding the needed member easier. See the following section, Sorting a Record.

This version of the program features an Auto Sort which is turned on in the Setup screen. If you do not want to sort because of this built-in Auto Sort, you can move directly to Duplicate, or Edit a record if the record is already in the database. You can also move directly to Add a record if the record is not found.
Sorting a Record

After using the Find function you can sort the records you found. Any type of a sort will allow you to move through alphabetically sorted records easily. You may have found several records and want to sort them for an easy, organized way to move through the list of found records.

1. Click on the Sort button. The Sort screen is displayed.

2. Click on one of these sort options; Last Name, Grade, Zip Code, School, Tenure, or Random to automatically perform a programmed sort.

3. After selecting one of these sorts the last screen will be re-displayed with the requested information (Last Name, Grade, etc.).
   - The text under Found (records) now says Sorted (as opposed to Unsorted).
   - Other custom sorts will be described later.
Deleting A Record

You can delete any records you have found. Because the previous database (CODB) has been imported into *Extension Database* you may find a need to delete some records. Some of these may be duplicates, incomplete, or just completely wrong records. Whatever the reason, deleting records is described below. **Remember, the delete is permanent and the record is gone!**

Click on the Last name field, and *then* click on the **Delete** button. This ensures you are on the actual record to be deleted.

Press the Cancel button and the record will not be deleted if you are not sure the record needs to be removed from the database. **The record will not be deleted.**

The message to permanently delete the current found set will be displayed. Records will delete more than the current record on the screen. **Do not delete:**

- If you are not the ED Administrator.
- If you do not have permission from the ED Administrator.

This message will be displayed when you click on the **Delete** button.

**Caution:** There is no un-delete of any records that are deleted. They will have to manually be re-entered if you accidentally deleted them.
Adding a New Record
(Adding a New Member’s Record to a Mailing Group)

Once you have searched the database using the Find function and did not find the person or any of his/her family’s records you want to add a mailing group, you can enter this person’s information as a new record.

1. Click on the New button and a new blank record is displayed.

HINT: When starting to add a new record, the only data that should be displayed on the screen are the default fields of; City, State, County, zip and area codes, and type of member/Group.

2. Enter the information using the following section on Entering Data in a Record.

HINT: If you are not typing in a blank record and you are typing over text displayed on the screen, you are not in a New record. Remember, this is a feature of FileMaker Pro; the fields need to be blank in order for this to be considered a New record.

Duplicating a Record

You may also just duplicate a family member's record and then edit the duplicate record.

1. Click on the Last field of the record you want to duplicate to ensure you are duplicating the correct record.
2. Click on the duplicate record button; a copy of the record is displayed.

HINT: Generally the fields duplicated are: First, Last, Township, Gender, Grade, School, Tenure, and Type of Member. The vertical scroll beside the Rolodex will be at the last record (bottom). The number of records will increase by one.

Editing an Existing Record

You may need to change information on an existing record. The following steps will let you change information in a record. Keep in mind, when you start to type, that all data is automatically saved.

1. Click in any field you need changed and type in needed information.
2. Use the Tab key to go from field-to-field, or use the left mouse key to click in any field, making necessary changes. Refer to the section Entering/ Editing Data in a Record for further details on each field.

HINT: Use the Shift-Tab key to go back to a previous field(s).
HINT: Filemaker Pro saves as you go so you no longer need to press F8 to commit the changes.
Entering/Editing Data in a Record

Once you have added, duplicated, or edited a record, you may need to enter the demographic information for that record (person). Remember you need to use the Tab key or the left mouse button to move from field-to-field while entering data. When you use the Tab key to enter data you will automatically display any drop-down list if available for that field. If you press the Enter key, you will add another line to that field, which is not recommended except for the comment field. Adding another line in the first or last name fields will cause labels to print incorrectly. For this procedure I am using the Tab key because I want to take advantage of the automatic drop-down lists and pull-down menus. Also, after making a selection, the fields will automatically fill any automated fields.

- After entering data in a field, press the Tab key to go to the next field.

1. Click in the Title field and enter a title, i.e., Mr., Mrs., Miss.
2. Enter the person’s First name field.
3. Enter the person’s Middle name field. This field is optional.
4. Enter the person’s Last name field.
5. Enter the Suffix field, i.e., Sr., Jr., Dr., Ph D. This field is optional.
6. Enter the person’s Nickname field.

HINT: In order to use the nickname on reports and labels select Yes on the Use nickname field at the lower right in the peach box.

7. The Mailing Status is a drop-down list. Scroll and click on one of the following options; Use Family address, Use mail label, Inactive Member, No mail. You need to use these flags if you want to omit from an option in a General Find.

HINT: See the Pre-Print screen section and Setup screen section for more information on mail flags.

- The Use Family address option is used to put The ______ Family on the first line of the label for this person.
- The Use mail label option will result in the placement of this person's information on the first line on the label.
- The Inactive Member option is used in a General Find and will omit these people from reports if that option is selected on the "Setup" screen.
- The No Mail option is used in a General Find and will omit these people from reports.

7. The Mail Label field is used to enter the text you want on the first line of any mailing label for this record as long as you have the mail flag set to use the mail label option.

8. Leave the Leader Tenure field blank, this is used in the 4-H section if/when this individual becomes a 4-H Leader.
9. Leave the year field blank, this is used along with the Leader Tenure field in step 8.

10. The Type of Member field is a drop-down list. Scroll and click on one of the following options: Adult, or Other (Business). 4-H and Mini are generally not done on this Mailing Group screen.

11. Enter the Address in the information address fields, using all three fields if necessary; then press the Tab key. (Line 1, Line 2 and Line 3).

12. Enter the zip code; if help is needed, click on the zip code field to the right. Choose one of the zip + City choices from the drop-down list.

HINT: If you know the city, click in the Light Blue outline field to quickly choose from the drop-down list.

- Once you have made a choice, the City, State, and Zip fields will automatically be filled in--a big advantage when you have several enrollments to enter into the database.
- If your zip data is not in the drop-down list, or you receive an error, you will have to click on the Setup button to go to the Setup section of the database and enter the data in the zip section before it will show up on a drop-down list. This will be covered in the Setup Lesson.

13. The home (HM) and work (WK) Phone fields will have the default area code for your County displayed. Tab to the next phone field and enter the prefix and phone number.

14. Choose Yes or No from the pop-up list for the Unlisted (phone) field.

15. The Extension (Ext) field is optional.

16. The Cell Phone, Bleeper, and Fax fields are all optional and self-explanatory.

17. The Override Eliminate Duplication is a Yes/No field. Click on Yes, if you do not want to eliminate duplication for this record based on duplication and No if you want to eliminate any duplicate records with the same last name, phone number codes, the zip, and zip+4. The Override Duplication is used when you select Household Member Duplicates question and Whole Family label question when requesting reports/labels in the Print Outs.

18. The Use nickname field is a Yes/No field. Click on Yes, if you want to use a nickname and click on No if you do not want to use a nickname.

19. The Override Last Name is a Yes/No field. Click on Yes, if you do not want to eliminate this record based on duplication and No if you want to eliminate duplication based on last name.

20. The Use E-mail only is a Yes/No field. Click on Yes, if you want to send mail to this person only via e-mail. Click on No, if you want to still produce paper labels and reports.

21. When finished you can click in the General Line fields to enter any information there.

- If the four General line fields are already being used in another section of the database you will not be able to use them here.
**Entering a New Mailing Group**  
(Adding a New Mailing Group to an Existing Person)

There will be times when you will need to add a new mailing group to an existing person's record. You will first need to find the person(s) to make sure they are in the database. Once found you will be able to use the steps below to enter them in as many mailing groups as you need. If you do not have a particular mailing group description entered in the Setup section you will need to complete that procedure first. See the section on Setup for entering new Mailing Groups descriptions.

1. You will first need to do the Find procedure to ensure the person is already in the database. See the section on “Finding a Member (always the First Step)” for information on a Find.
2. Have the person’s record displayed.
3. Scroll the Mail Groups list displayed in the white (Portal) area to make sure the Mailing group is not already entered for this record.
   - Use the **Sort by Year** button to display Mail Groups by the year with the newest year displayed in ascending order. You will need to enter the year for each record to be able to use this button effectively.
   - Or, use the **Sort by Mailgroup** button to display Mail Groups by alphabetical order.
4. Click on the **New Mail Group** button. A new blank record is displayed in the white (Portal) area of the screen with a list of valid mailing groups displayed in a drop down list.
5. **Scroll** and select the Mailing Group record you need for this person.
   - The mailing group will be displayed as blue underlined text and is not a clickable link and is used to more easily identify the mailing groups’ titles only.
6. The **Year** field will automatically enter the current year or you can change the year field if needed. This field is optional and can be left blank.
   - The best way to keep track of how long a person is on a particular list would be entering the first year they are added to a mailing list.
   - You can leave this field blank if you are not interested in keeping track of when a person is first put on a mailing list. Keep in mind that this is not the ideal option.
7. Repeat steps 4 through 6 for this person if you have other mailing groups that need to be added.
   - Repeat steps 1 through 6 for other people.
Entering Records in a Group Enroll

More and more frequently you need to produce mailing labels or reports that use multiple finds from several mailing groups on a re-occurring basis. You can do a combined find each month for the mailing groups. That's fine, or you could save time each month if you combined these several mailing groups into one mailing group. This procedure describes how you can create a mailing group that will combine mailing groups finds into one mailing group. This is a quicker way to get multiple mailing groups labels/reports from the Print Outs section. There are other examples of found records that can be included in a group enroll, i.e. a find that includes clubs, projects, and mailing groups.

You will need to create a Mailing Group description in the Setup section so it will appear in the drop down list. See the section on Setup for entering new Mailing Groups descriptions to create this new Mailing Group code. For this procedure we will call the combined mailing group Monthly Newsletter.

1. Click on the Find button.
2. Click on the Mail Group drop-down list field (the Black outlined box in the white portal area) and select a mailing group you want to place in the combined group. For example, Goat Committee.
3. If you are using the Year field and have several years for the Goat Committee you can use the Symbols drop down menu and select a range of years; i.e. 1998…2003 or you can leave this field blank to find all years for Goat Committee.

You can use any of the options in the Symbols drop down menu to do multiple finds. The Symbols drop down menu can be found in column one just above the Continue button. For the range example, first enter the year 1998, click on the Symbols button and select the “…range” then enter the 2003 year.

4. Click on the Duplicate button.
5. Click on the Mail Group drop-down list field again and replace the current mailing group with another mailing group. Change the Year field if necessary.

Notice the Rolodex now has two records, this will increase by one each time you select another mailing group to find.

6. Repeat steps 2 through 5 for each of the mailing groups you want to include in your group enroll mailing list; i.e. "Monthly Newsletter".

If you don't first do a find or a combined find, you will give every record in the database this mail group when you do the next steps.

7. Click on the gray Continue button found in column one.
8. Click on the Gray-outlined box (located at the top right of the Mail Groups screen and beside the Group Enroll button). This will display the Mail groups drop down list.

9. Scroll and select the combined Mailing Group name. For this example we are using Monthly Newsletter as our combined mailing group.
10. Click on the blue Group enroll button. The following message will be displayed,

11. Click on the OK button if you are sure you want these found records added to the combined mailing group, i.e. the mail group you have in the Gray outlined box beside the Group enroll button.
12. You will notice each of the records will be updated.
   - You can scroll through the rolodex and notice the "Monthly Newsletter" mail group has been added to your records in the rolodex.

13. Now when you find a set of labels for your newsletter you only need to use the "Monthly Newsletter" mailing group to get the combined groups.
   - For new people you want to add to any of the original mailing groups, remember to also individually add them to the Monthly Newsletter mailing group.
Exercise 6 –

1. Enter a member to one of the Mailing Groups provided for this training.
2. Enter a Mailing Group for a person who is also in the 4-H section of the database.

Bonus Exercise 6 –

Enter more members to other Mailing Groups as time permits.