

Lesson 6

Creating lists, mailing labels, and form letters

You can easily create layouts to view and print information in many different ways.

In this lesson, you will create:

- a list of your records
- mailing labels
- a form letter

Create a columnar list

A columnar list shows many records simultaneously. Each row is one record. Each column holds one category of data, such as Last Name or Phone Number.

Look at the sample list

You can create a list of records that shows just the information you want to see.

1. Open the Tutorial folder in theFileMaker Pro 5 Trial folder.
2. Open the Sample Files folder.

You should be here:FileMaker Pro 5 Trial\Tutorial\Sample Files.

3. Open Sample06.fp5.
4. Choose the List of Members layout from the layout pop-up menu.

Layout pop-up menu



You see a columnar list showing some of your fields.

<u>Last Name</u>	<u>First Name</u>	<u>Company</u>	<u>Membership Type</u>
Smith	Mary	DEF Ltd.	Continuing
Common	Andre	ABC Company	Continuing
Williams	Steve	ABC Company	New
Ogawa	Kentaro	ABC Company	Continuing
Durand	Marie	DEF Ltd.	Continuing

About columnar list layouts

Choose View menu > Layout Mode to view the layout that produces the columnar list you just looked at.

Each field on the layout appears once, but the list displays many records.

<u>Last Name</u>	<u>First Name</u>	<u>Company</u>	<u>Membership Type</u>
Last Name	First Name	Company	Membership Type

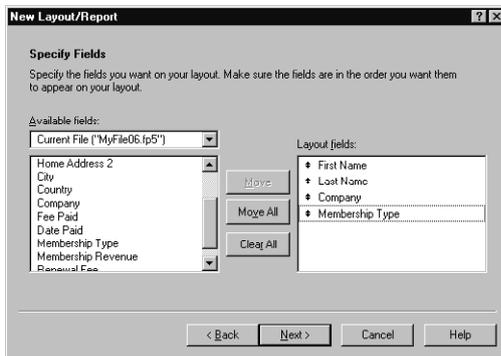
Create a columnar list

1. Open the Tutorial folder in theFileMaker Pro 5 Trial folder.
2. Open the Working Files folder.
You should be here:FileMaker Pro 5 Trial\Tutorial\Working Files.
3. Open MyFile06.fp5.
4. Choose View menu > Layout Mode.
5. Choose Layouts menu > New Layout/Report.
6. For Layout Name, type List of Members.
7. Select Columnar list/report for the new layout type and click Next.
8. Select the Columnar list/report layout again, then click Next.

9. Double-click each of the following fields in the order you want it to appear in the list:

- Last Name
- First Name
- Company
- Membership Type

These fields move to the Layout fields list.



10. Click Next.

11. Click Next on each of the next four panels to accept the defaults.

12. Click Finish.

13. Choose View menu > Browse Mode.

The data in all records for the fields Last Name, First Name, Company, and Membership Type appears in the List of Members layout.

Create mailing labels

Look at the sample labels

1. Choose Window menu > Sample06.fp5.
2. Choose View menu > Browse Mode.

3. Select Labels in the layout pop-up menu.

You see the mailing label for the current record.

4. Choose View menu > Preview Mode.

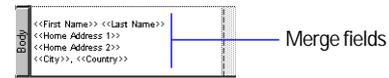
You see a page of labels as it will print.

5. Notice that not all records have the same number of lines of text.

Records with four-line addresses display all lines. In records needing only three lines, the extra line is omitted so there is no blank line in the labels.

6. Choose View menu > Layout Mode.

You see the names of fields that will appear on the labels.



About label layouts

Label layouts use *merge fields*. Merge fields expand or contract to fit the data in the field, and take no space if the field is empty. Merge fields are for display and printing only. You don't enter data into merge fields.

Create a label layout

In this section, you will use the New Layout/Report assistant to:

- create a label layout
- select fields to include on the labels

Create the label

1. Choose Window menu > MyFile06.fp5.
2. Choose View menu > Layout Mode.
3. Choose Layouts menu > New Layout/Report.
4. For Layout Name, type Labels.

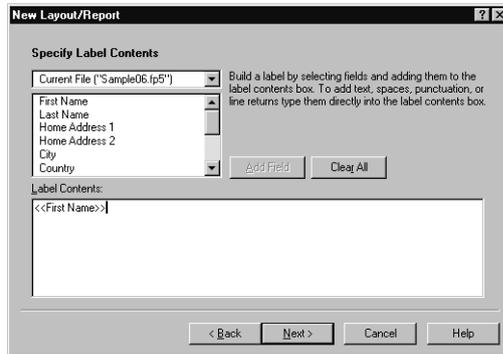
5. Select Labels for the new layout type.
6. Click Next.
7. Choose Avery 5160 from the Use label measurements for list.
8. Click Next.

Now you're ready to specify the label contents.

Choose the fields that will appear on the labels

1. Double-click First Name in the list.

First Name moves to the Label Contents area. The insertion point flashes.



2. After First Name, type a space.
3. Double-click Last Name in the list.
4. After Last Name, press Enter (Windows) or Return (Mac OS).
5. Double-click Home Address 1 in the list, then press Enter (Windows) or Return (Mac OS).
6. Double-click Home Address 2 in the list, then press Enter (Windows) or Return (Mac OS).
7. Double-click City in the list.
8. Type a comma, then a space.

9. Double-click Country in the list.

Now you have set up the merge fields.

10. Click Next.
11. Click View in Layout mode.
12. Click Finish.

Your label should look like this:



13. When you finish viewing your label layout, choose View menu > Preview Mode.

Your labels should look like those in the sample file.

Create a form letter

Look at the sample letter

1. Choose Window menu > Sample06.fp5.
 2. Choose View menu > Browse Mode.
 3. Choose Welcome Letter from the layout pop-up menu.
 4. Flip through the records and look at the letter. You might need to scroll down to see all of it.
 5. Notice the personalized address and salutation for each record.
 6. Also notice that the wording in each letter is the same, except that the company name for each record appears in the first paragraph. The text flows around the company name, regardless of its length.
- This letter is ready to print, for every record in the database.

About form letter layouts

The letter is simply a layout containing text, merge fields, and a graphic.

1. Choose View menu > Layout Mode.
2. Click anywhere on the text.

You see the handles in the corners of the entire text block. All of the text is in a single text block.

3. Notice that Company is a merge field in the body of the letter.

The address and salutation also use merge fields.

Create a form letter

To create this letter, you will:

- create a blank layout
- create a text block to contain your letter
- add merge fields for the recipient's name and address
- type the letter
- customize the letter with the recipient's company name
- add the closing

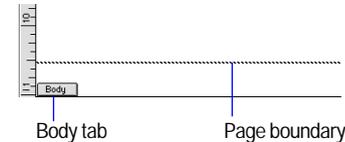
Create a one-page blank layout

1. Choose Window menu > MyFile06.fp5.
2. Choose View menu > Layout Mode.
3. Choose Layouts menu > New Layout/Report.
4. For Layout Name, type `Welcome Letter`.
5. Select Blank layout for the new layout type.
6. Click Finish.
7. On the layout, click the Header tab, then press Backspace (Windows) or Delete (Mac OS).
8. Click the Footer tab, then press Backspace (Windows) or Delete (Mac OS).

This letter will not use a header or footer.

9. Drag the Body tab down to about 11 inches.

When you release the mouse button, you will see the page boundary. If you don't see the page boundary, drag the Body tab down some more.



10. Now drag the Body tab up to just above the page boundary.

The page boundary line will disappear.

11. Use the scroll bar at the bottom of the screen to scroll a few inches to the right.

You see a heavy dotted line along the right side. This is the right-side page boundary. Your letter will be within these boundaries.

12. Scroll back all the way to the left.

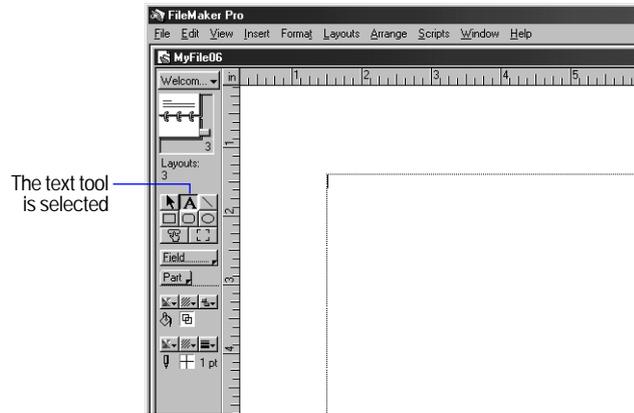
13. Scroll up to the top of the layout.

Create the text block

You will create a text block with a 1.5-inch margin on all sides.

1. Click the text tool .
2. Drag a rectangle starting about 1.5 inches from the top left side of the layout, and ending about 1.5 inches from the bottom right side, as indicated by the page boundary lines.

When you release the mouse, the insertion point flashes in the top left of the text box. You will type the letter inside this box.



Add the address

1. Choose Insert menu > Merge Field.
2. Select First Name in the list and click OK.
3. Type a space.
4. Choose Insert menu > Merge Field.
5. Select Last Name in the list and click OK.
6. Move to the next line (enter a line space):

Windows: Press the Enter key above the Shift key on the keyboard.

Mac OS: Press Return.

7. Add merge fields for the street address, city, and country, with appropriate spaces, new lines, and punctuation.

Type the letter

1. Press Enter (Windows) or Return (Mac OS) twice to create two line spaces at the end of the address.
2. Start the salutation line: type *Dear* and a space.
3. Insert merge fields for the first and last name, separated by a space.

In your own letters, you can use more fields (for example, a title field) for a more elegant salutation.

4. Type a comma and two line spaces.

5. Type the letter:

The Corporate Travelers Club welcomes you and your company to our organization.

We look forward to doing business with you and hope you have many pleasant trips with us!

Customize the letter with the company name

1. Click after the word company in the first paragraph.
2. Type a comma and a space.
3. Insert a merge field for the company name.
4. Type another comma.

Add the closing

1. Click at the end of the text and enter two line spaces.
2. Press tab several times to go to the center of the text block.
3. Type *Sincerely*, then enter four line spaces.
4. Press Tab several times to align the insertion point with *Sincerely*, and type *John Jones*.
5. Enter a line space, then press Tab again to align the cursor with the previous lines of text, then type *President*.

Your layout should look like the letter in the sample file.

6. Choose View menu > Browse Mode to see your letter.

It should look like the letter in the sample file. See lesson 5 to learn how to add a logo.

7. When you are finished with this lesson, close each open file by choosing File menu > Close.

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