

# INSTRUCTIONS FOR SUBSCRIBERS FOOL



An introduction to managing magazine subscriptions

Database Associates LLC  
9421 Dice Lane, Lenexa, KS 66325  
913-599-6722

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## Introduction, Background and Acknowledgments

**What is Subscribers Fool?** It is a computer database program designed to manage subscriptions for multiple magazines. It has been designed specially to make the day to day tasks of managing simple, fast and intuitive.

**Why “Fool”?** Well, generations ago, in early print shops, the apprentice worker was called the printer’s “fool” - because he didn’t know much. He was generally a “go-fer”, the guy who ran all the errands and did all the grunt work in the shop. That is what our program does, except our program is a whole lot smarter than the average fool.

**Subscribers Fool is written using Filemaker Pro version 8.5** (and higher), a very powerful platform that works on both Windows and Macintosh computers. Who did it? The program was created by Dave Brown of Database Associates, LLC, Lenexa, Kansas, and Mike Williamson of Custom Database Design, Lyons Kansas. It is a more powerful replacement for Database Associates’ “Subscription Manager” which has been in use for many years.

**Testing help and consultation was supplied by Deb Ringena**, Circulation Manager of the Pioneer Group of magazines - based in Des Moines and Grundy Center, Iowa - which include The Iowan, Iowa Gardening, Collectors News, Collectors Editions, Village D-Lights, BBQ & Fiery Foods, Iowa Golf and many other publications.

We also wish to acknowledge the unselfish and cooperative help of members of the Filemaker Development community through the Filemaker Solutions Alliance who are dedicated to the ongoing improvement of database solutions.



## Overview

**Subscribers Fool** keeps track of all your information on all your customers on multiple publications.

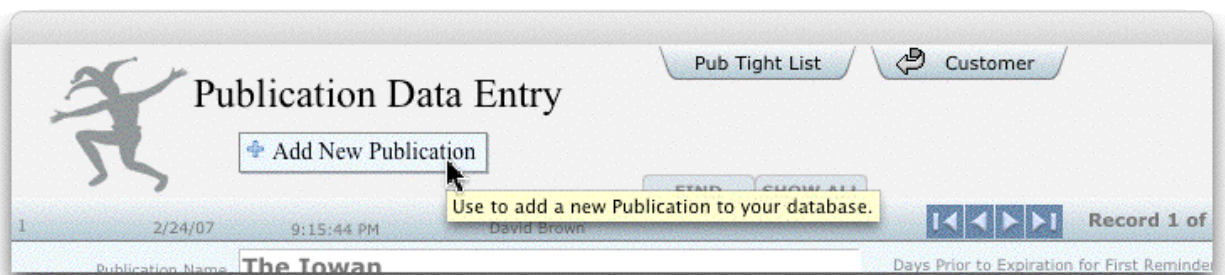
It keeps track of each customer, and each subscription that your customers have.

**Subscribers Fool** is organized beneath the surface to track customers, subscriptions, publications and issues. This allows you to quickly see all subscriptions for a customer OR all the remaining issues for a subscription OR all the subscriptions for a publication.

**Subscribers Fool** also has powerful reporting capability, AND unparalleled power and ease of use.

## Tools for Guidance and Help


**TOOL TIPS:** A useful instructional aid is the TOOL TIP. Almost every button and field where a question might arise is equipped with a Tool Tip. When you hover your cursor over a button, a small yellow box will appear that will tell you what that button or field does.



## Setting up Subscribers Fool for your publication(s)

When Subscribers Fool opens - you are taken to the Main Menu. From here you select buttons for the activities you want to work on. Note: in almost every screen there is a button in the upper right corner, that will take you back to the Main Menu - the starting place.

**Entering Preferences:** In the Main Menu, click on the button titled “Set Preferences”. In this window you set the information about your company - you only need do this one time, and Subscribers Fool will automatically bring that information to any point where it is needed. Set it once and forget it. To amend it go to Set Preferences, change the information there and it is changed everywhere.

**Entering Publications:** In the Main Menu click on the button titled View Publication(s). You are taken to the Publications Tight List where all the publications are listed. If there are no publications then click on the button titled “ + Add New Publication”. You will be taken to the Publications Data Entry screen. Here you can enter the name of your publication, and you can set the Issue Months. There is also a button that will create a years worth of issues as well as other needed parameters. On the tight list you will see a right pointing arrow , clicking this arrow will take you from the Publication Tight List to the Publication Data Entry screen.

## Importing Customers

Any database has to import its list of customers. Normally we accomplish this task for our clients, as it is task that requires some special knowledge and a lot of attention to detail that affects your database. The two main imports involve Customers, and their Subscriptions - and finally linking the two together.

## Using Subscribers Fool

**Entering Customers:** One of the main tools used in working with the database is the “Choose Customer” button on the Main Menu. Although this is usually used to locate customers in the database, it is also the point where new customers are entered into the data-

base, using the button on the screen titled “ + Add Customer”. This will take you to the Customer Data Entry screen where you can enter all the customer and subscription information. This is the window where you can also do renewals.

Choose Customer enters FIND mode, and is setup to find a record when you type any part of the customer name, address, city or state. Once you see the name, simply click on Go to Data Entry to see the customer’s record

**Entering Subscriptions:** Subscriptions are entered on the Customer Data Entry screen, opposite the word NEW. Click on the Publication field, and a list of all the publications in the database appears. Select the one you want. When you select on it will show the number of issues available per year. Enter in the number of issues the customer wants to buy. Then enter in the price (in the top box) and how paid in the bottom box under Price. Click on the Type button if the subscription is to be a gift - or anything other than a subscription for the customer (which is classified as SELF.) Click on the Promo Info window and select the promotion (if any) that generated this subscription. Everything entered and checked. Click NEW, and the program enters the subscription, and moves the information into the area below which is called SUBSCRIPTIONS.

**Setting up GIFT Subscriptions:** A gift subscription begins on the Customer Data Entry screen of the person giving the gift (let’s call that person the Donor).

1. In the area designated as NEW, we click on the Publication to select which publication - a number appears next to the publication name and that is the number of issues in a one year subscription for that publication.
2. Let’s type in the number of issues we want to buy. In the next field we enter the price.
3. Then in the field called Type click and select “Donor”. In the next field, if you have promotion information, you can select and enter it there.



The screenshot shows a software interface for entering a new subscription. On the left, the word "New" is written vertically. The main area contains several input fields and buttons. The "Publication" field is selected, showing "BBQ and Fiery Foods" with a blue arrow icon to its left. To the right of the publication name are two small boxes, both containing the number "4". Further right is a "Price" field containing "\$25.00". Below the price field is a "Type" button labeled "Gift". To the right of the "Type" button is a "Promo Info" field, which is currently empty. At the far right of the form is a green button labeled "New".

4. With all the information about the gift subscription entered, simply click the button labeled NEW. A window will appear titled Select Person for Gift. You can locate someone that is already in the database by typing 3 letters of their last name in the field titled FILTER. Then when you click in the field below titled CUSTOMER ID you will see a filtered list of all existing accounts beginning with those three letters. You can then choose the one

you need, and click CONTINUE and a Gift Subscription will be built, and the window will close.

Select Person for Gift

Select for Existing Recipient

Filter

Customer ID

or

Enter New Recipient

Company

First, MI, Last

Title

Address One

Address Two

Address Three

City State Zip

Phone

Email

CONTINUE

IF the recipient of the gift is not in the database, you can Enter New Recipient in that part of the window that is provided, and a new customer account will be created for that person when you click CONTINUE.

The new Subscription will appear at the top of the listing of Subscriptions (see below). And that subscription information contains a way to view a lot of information. For example, if you click on the small “I” (labeled Mouse Over Info), a tool tip will appear that will tell you who the gift recipient is. And if you click the blue arrow to the right, you will be taken to the Recipient’s Customer Data Entry screen. Once there, the same blue arrow will take you back to the Donor’s Customer Data Entry screen. The blue arrow on the far left will take you to the Subscription Data Entry screen. Remember the blue arrows are navigation tools that allow you to move around the screens in the database with ease.

	Bonus Issues	Issues Remaining	Price	Over Info	Type
364	5/14/2007	4 Dec 2007	\$25.00		Gift
360	5/13/2007	4	\$25.00		

**Exporting Subscription Reminders:** From the Main Menu click on the button titled View Publications - this brings you to the Publications Tight List. For each publication this list shows the number of records for each publication that will need First Reminders or Second Reminders. The list also shows the number of days in the interval between First reminders and Second Reminders. You can change this interval whenever you wish. Clicking on the Export button will send a delimited listing to your desktop, with the name of the publication and the date the records were exported from the file.

**The Gift Subscription Reminder Letter:**

This is a special letter that is mailed to the DONOR of the subscription when a gift subscription comes up for renewal. The rule we have set up in the database is that all reminders go to the DONOR instead of the RECIPIENT of a subscription. The assumption is that the DONOR will want to renew the gift. If the DONOR does not review, then renewal efforts are directed at the RECIPIENT, only after the subscription expiration date has expired.

Our clients have discovered that the Gift Subscription Reminder Letter works very well if it reminds any DONOR about all the gift subscriptions they give when any one reminder is needed. Often they renew all their pending gifts from the one letter.

**Exporting Subscription Lists:** The Subscription List is the current list of subscribers, and it is usually exported as a delimited text file to be used in addressing the current mailing to subscribers. From Main Menu select View Publications. When you get to the Publications Tight List, click on the small blue arrow to the left of the name of your publication, and this will open the main Publication Data Entry screen for that publication. There you will see the list of issue names. Under each issue (usually an “issue date”) there is a count of Paid, Complimentary, Advertising issues, and the Total. An export button permits you to create a listing of mailing addresses. There is also an additional button for the export of a second mailing of addresses, which can be used after the first mailing (for subscriptions received after the first mailing).

Another option is to use Postcard mailings. This option is very handy for smaller publications. It offers a cheaper alternative, and allows the user to quickly produce reminders and followups at low mailing cost.