



Clarix Explorer Lab

Generative AI in FileMaker



About Matt



- **Passionate FileMaker trainer**
- **Expert FileMaker developer**
- **Certified in FM versions 7 to present**
- **Founded 3 companies**
- **FBA Awards, conference sessions, Meetups**
- **ClarisTalk AI podcast with Cris Ippolite**



Navarre Training

- www.navarre.training
- matt@navarre.training
- Schedule a free zoom to talk about your learning path



FileMaker Champion Series

- Live, interactive, skills-based, current best practices
- Foundations, Intermediate, Expert
 - Three classes cover the platform from end to end
 - Interactive class, focuses on skills and retention
 - Learn best practices, new features including **AI integration**



FileMaker Champion Series

- Foundations: September 8th
- Intermediate: September 22
- AI Integration: Oct 20th



Agenda

- A few more slides
- Interactive training ~ 45 minutes
- Discussion / Q&A minutes



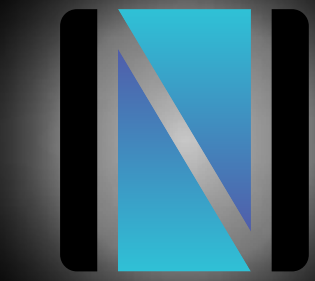
Goals

- Start from sample data file
- Generative AI's place in FileMaker
- Changes in FM 2025
- Discuss agents, assistants and more
- Integrate and play with prompts



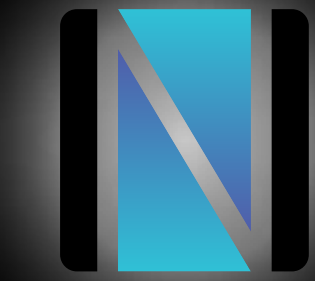
Report, defined

- Displays meaningful data
- Customizable
- Visual
- Can be run as data changes



The old way

- Create a list layout
- Add fields, sub-summaries, sorts, etc.
- Create UI to run report with date ranges, etc.
- Write a (complex) script to find and display data
- Difficulty: Medium
 - Extra credit: virtual list, PDF export, etc.



The New Way: Method One

- Leverage existing layouts to display data
- ‘Generate Response from Model’
 - Replaces UI, find, sort, script, etc.
- Uses AI to search/sort, leverages existing FM power
- Difficulty: Easy



The New Way: Method Two

- Use Generative AI to create text
- Or to create HTML
- Shifts work from FM scripting to prompt engineering
- Requires structured as 'truth'
- Difficulty: Medium



Script Steps

- Configure AI Account
- Insert from URL ()
- Generate Response from Model ()
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To the interactive class...