



# **v.5 Use Shelby to Communicate Electronically**

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# Objective

This class will look at a variety of methods of communicating electronically with church members directly from the Shelby v.5 software and from other tools. We will discuss best practices and look at what to avoid.

## What You Will Learn

- How to use the ShelbyCommunicator report type in Selections & Listings to queue up multiple communication methods in one report design.
- How to prepare an HTML document for sending with ShelbyCommunicator or the Group Email – SMTP report option in Selections & Listings.
- How to send email messages directly from the Membership Name List screen by using the Mail Merge/Email button.
- How to send a Word form letter document to email accounts with the “Send Email Messages” merge option.
- How to send text messages from Selections & Listings, the Membership Name List, or Check-In.
- How to export names and email addresses to Constant Contact via a Selections & Listings report.

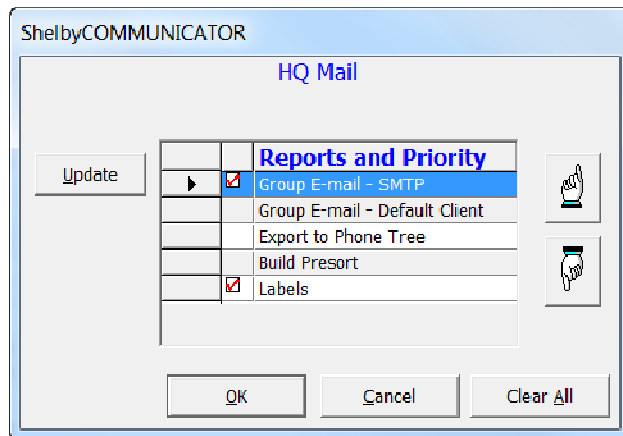
# ShelbyCommunicator

The **Shelby Communicator** will allow you to produce mass **emails** to a group of people: a youth group or a Sunday school class, for example. The recipients can have different types of contact information available. You can choose the preferred contact method: **Group Email, Phone Tree, Presort, or Labels.**

Let's say that you want to send out a message via email, but some of your members do not have email addresses. For those without email addresses, you would like to have labels printed. The **Communicator** eliminates the need to run multiple reports. It will create these reports using the process of elimination **based on priority** to prevent duplicating records from one report to the next (**i.e., if no email then print label**).

On the right side of tab one (**1 Criteria/Reports**) is a grid of reports.

Double-click the word **Shelby Communicator (ALL)**. Make sure Group Email – SMTP is highlighted and single-click the **update icon** to the left. It will then open another box which needs to be filled out (both tabs). Click OK. It will bring you back to the box where you can now highlight Labels and click the update icon again, fill out label information, click OK. You will come back to the Communicator box but this time you will see two checkmarks placed at Group Email – SMPT and Labels.



## Tab 1. Send Mail Info

The screenshot shows the 'Group E-mail - SMTP' window with the 'HQ Mail' tab. The '1. Send Mail Info.' sub-tab is active. Fields include: SMTP Server (mailserver.yourorg.org), From and Return Address (User), Display Name for E-mail (HQ), User Name, Password, and Re-Type Password. A red box highlights the User Name, Password, and Re-Type Password fields with the text: 'These fields only used if required by your mail server'. At the bottom are 'Delete Report', 'OK', and 'Cancel' buttons.

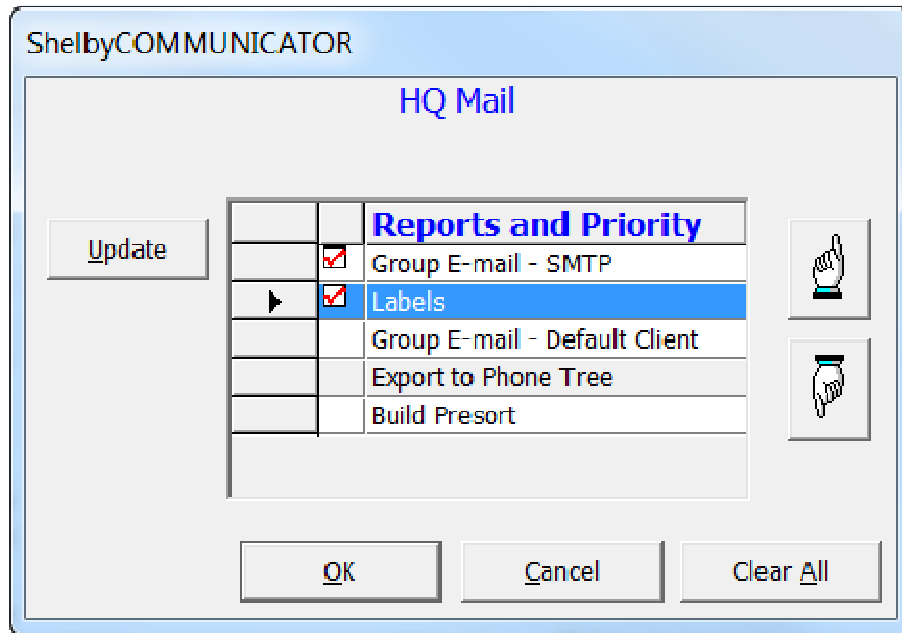
## Tab 2. Email Info

The screenshot shows the 'Group E-mail - SMTP' window with the 'HQ Mail' tab. The '2. E-mail Info./SMS Info.' sub-tab is active. Fields include: 'Send SMS Message?' checkbox, Subject, HTML file or type message below, Previous HTML Files (None), and Attachment (leave blank if none). There are also checkboxes for 'Do not Print Duplicates?', 'Send to Primary E-mail Only?', 'Make this E-mail Private (when viewing E-mail history)', and 'Send to Parents if Child is Selected?'. At the bottom are 'Delete Report', 'OK', and 'Cancel' buttons.

When you have completed setting up each report to be included, you are ready to establish the priority. To do this **highlight one of the reports that has a checkmark and click on the "up" icon on the right to move the report up so that it will run first, or the "down" icon to move it so that it runs after the first or second report.**

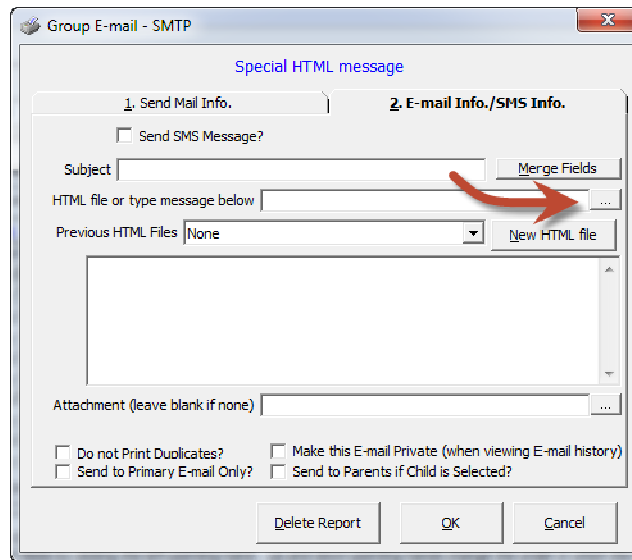


In the example illustrated below, the Group Email – SMTP will run first and then Labels.

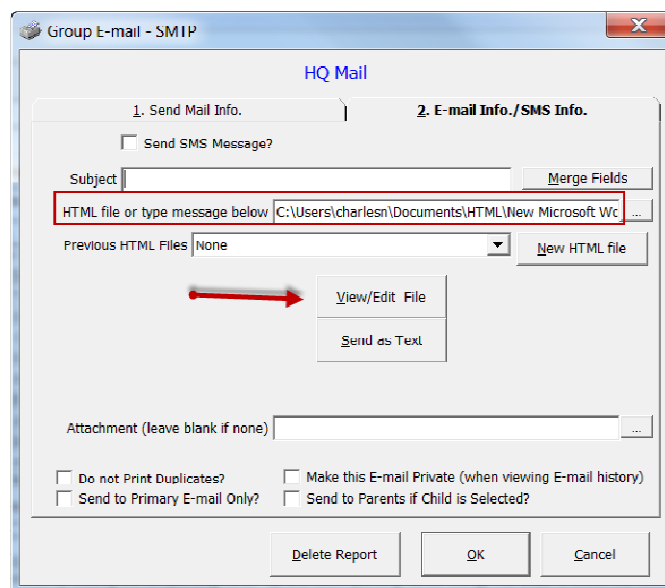


# Sending an HTML Document

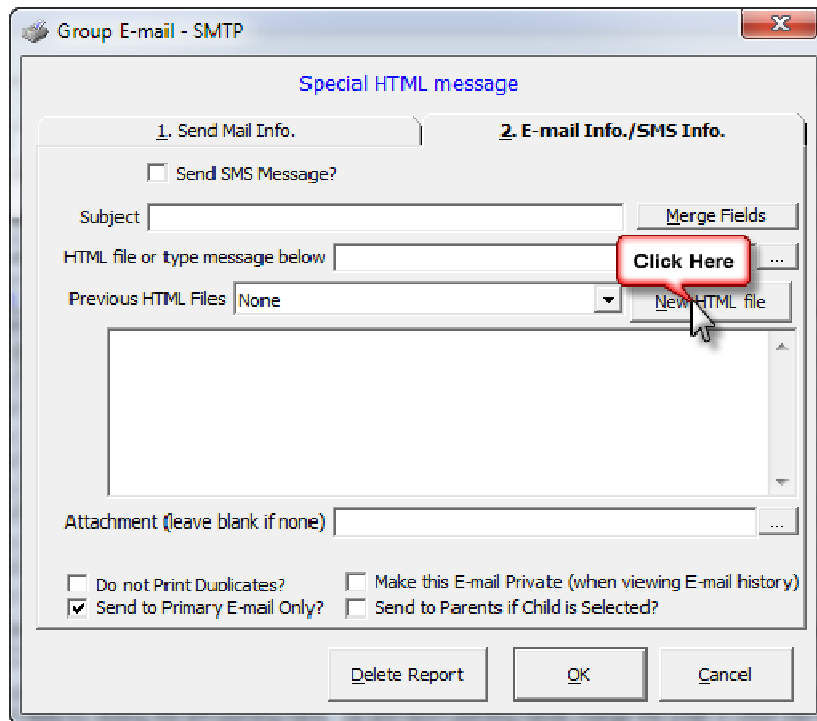
1. Open the **Group Email – SMTP** report output setup.
2. After making sure the **Send Mail Info.** tab is completed correctly, switch to the **Email Info/SMS Info** tab.
3. If you have an HTML document saved already, click the Search icon to browse for the file and select it.



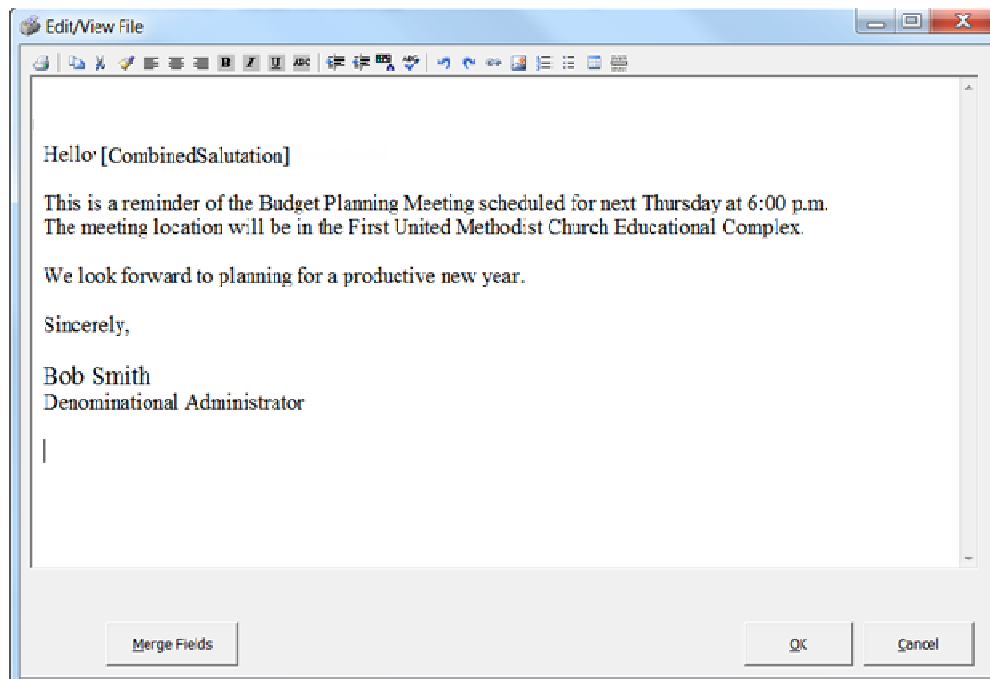
Once you have selected the file, click the View/Edit button to preview and to update the file contents.



4. If you do not have an HTML document saved already, click the **New HTML file** button.

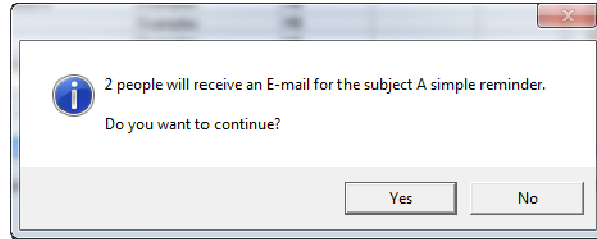


5. Once you have the HTML editor open you can edit the contents of the message using the editor. To insert merge fields, using the Merge Fields button at the bottom of the editor window. Any valid key word that is enclosed in brackets becomes a merge field, so it can be typed directly or inserted with the Merge Fields button.



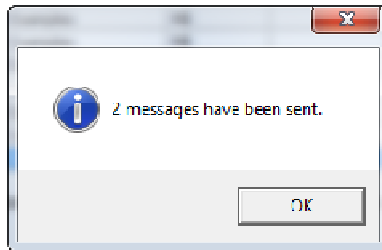
## Running the Report In Shelby

When you are ready to run the report, have it highlighted and click the icon that looks like a runner. It will process and give you the following message.



This is the actual number of people *selected* – **NOT** the actual number of emails being sent. Click **YES** to continue.

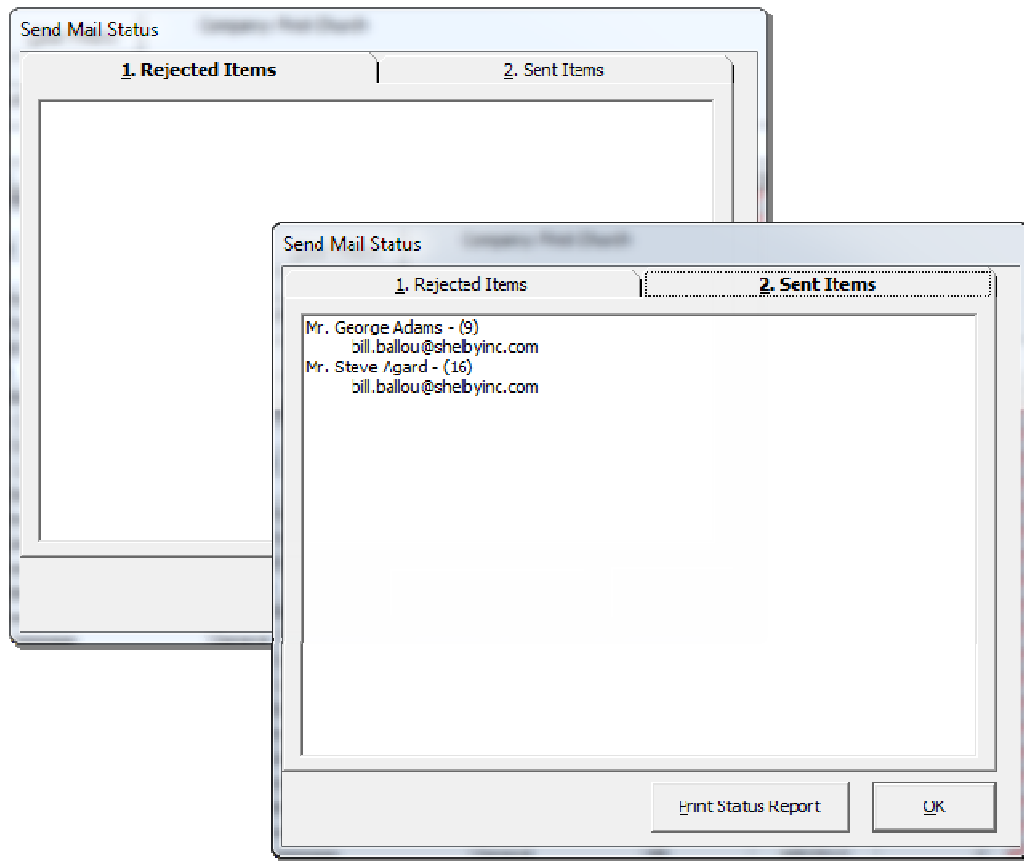
The report will continue to process and now you will receive the following message:



This message **IS** the number of emails that were sent out. **Click OK.**

It will then print to screen an SMTP - Group Email List giving each person's name and email address to which it was sent. You can print that out if you want or just click the yellow Close folder icon.

You will then get the following message:



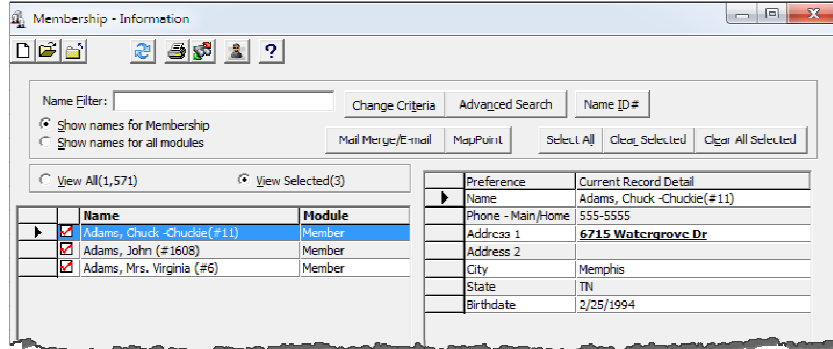
Tab 1 is a list of those “bad emails” that were rejected by the SMTP server, and **Tab 2** is a list of names (and NameCounter values) of those who were sent an email. **Click OK.**

The report will continue to process and will then show the labels on the screen (based on which label type you set up earlier) for those who did not have an email address. Place your labels in the printer and print. Click to close by hitting the yellow folder icon. It will print another list of those to whom it attempted to send an email. Close again. This time it will take you back to your list of reports in Selections and Listings.

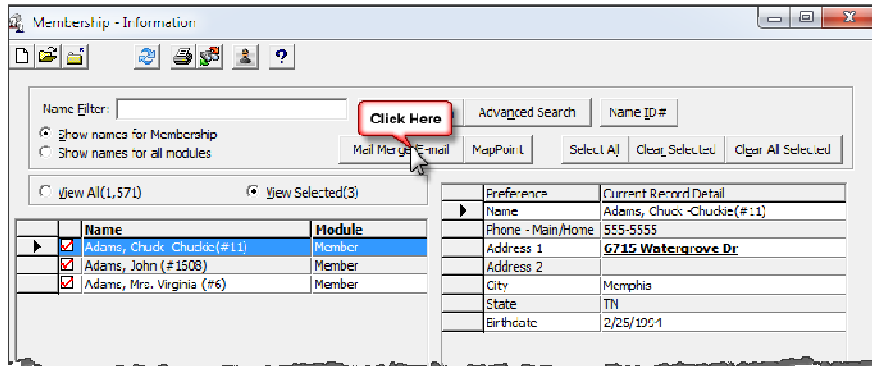


# Using the Mail Merge Button

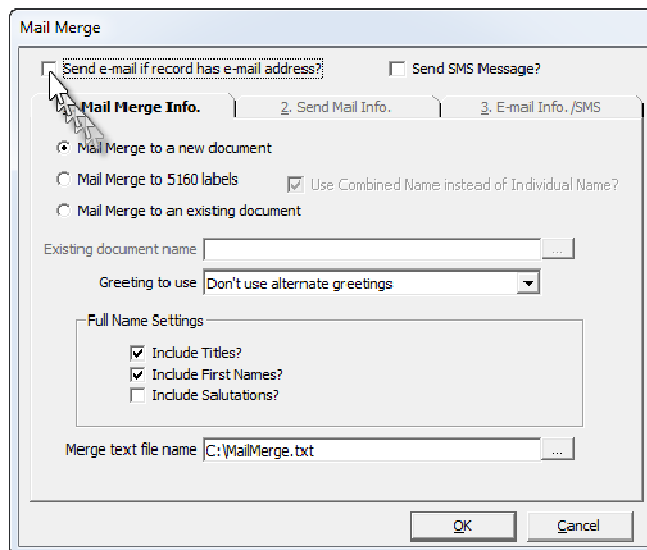
1) Select your recipients.



2) Click the "Mail Merge/Email" button.



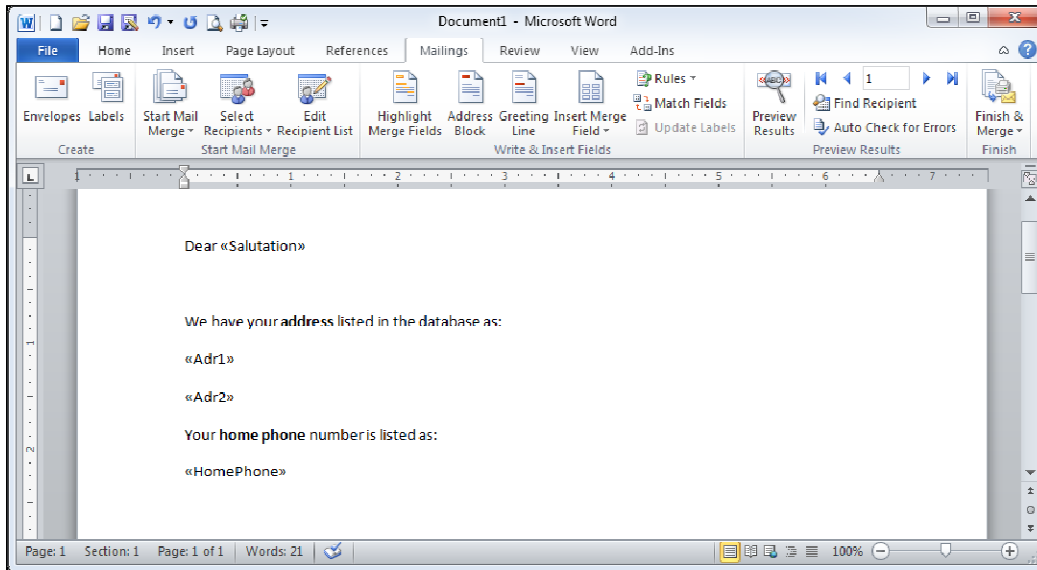
3) Check the "Send email..." checkbox. Tabs 2 and 3 are grayed out until this is checked.



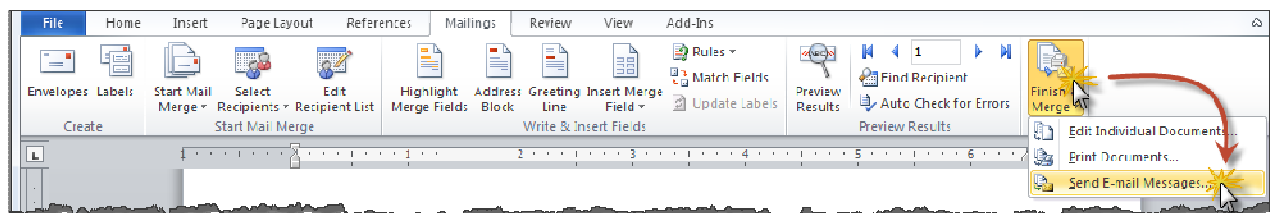
4) See earlier instructions in this document for details about tab 2 and 3.

# Emailing from Word

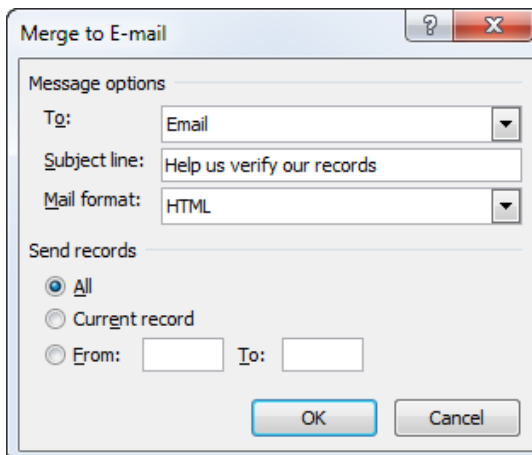
1) You can use this same setup, but create a merge document in Word.



2) Click the Finish and Merge option.



3) Send your email (see example).



## To send SMS text, first add cell carrier to Cell Phone information.

Beginning with Shelby v.5.10.1000 the Phones screen includes a Cell Carrier drop-down option that is active only for the Cell Phone phone type. In order to be able to send a text message directly to a person from the Shelby v.5 software, that person must have both a cell phone number and the corresponding cell carrier listed on the Phones screen.

Phone Type	Phone Number	Ext.	Unlist
Main/Home	(901) 555-9876		<input type="checkbox"/>
Business			<input type="checkbox"/>
Personal			<input type="checkbox"/>
FAX			<input type="checkbox"/>
Cell Phone	(901) 555-1234		<input type="checkbox"/>
Pager			<input type="checkbox"/>

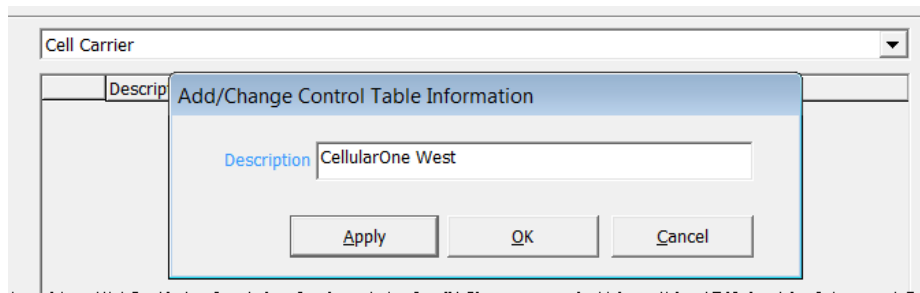
Dial Phone  
Stop Dialing  
Preferences

Cell Carrier  
At&T

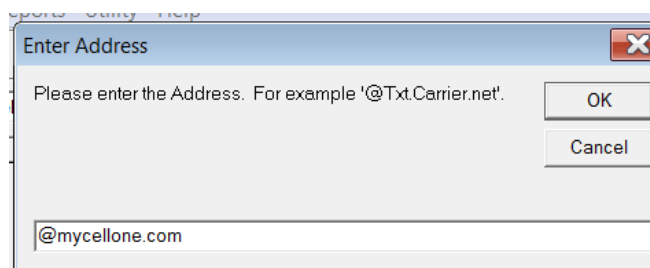
## Add new cell phone carriers using the Control Table Information utility.

Even though the system has most of the popular cell carriers pre-loaded into the drop-down option, there may be some smaller providers that are not listed. You can add providers through the Control Table Information utility's option for Cell Carrier. Before you start this process, be sure that you know the cell provider's email address for text messages. The provider's web site should have that information. To add a new carrier, use the steps below.

1. Open the Home Base of GlobaFILE, Membership, or any module with the Control Table Information utility.
2. Click **Utility > Control Table Information**.
3. Change the pull-down option to **Cell Carrier**.
4. Click **File > New**.
5. Type in the description of the new cell provider and click **OK**.



6. Enter the domain portion of the email address, including the leading @ sign, and click **OK**.



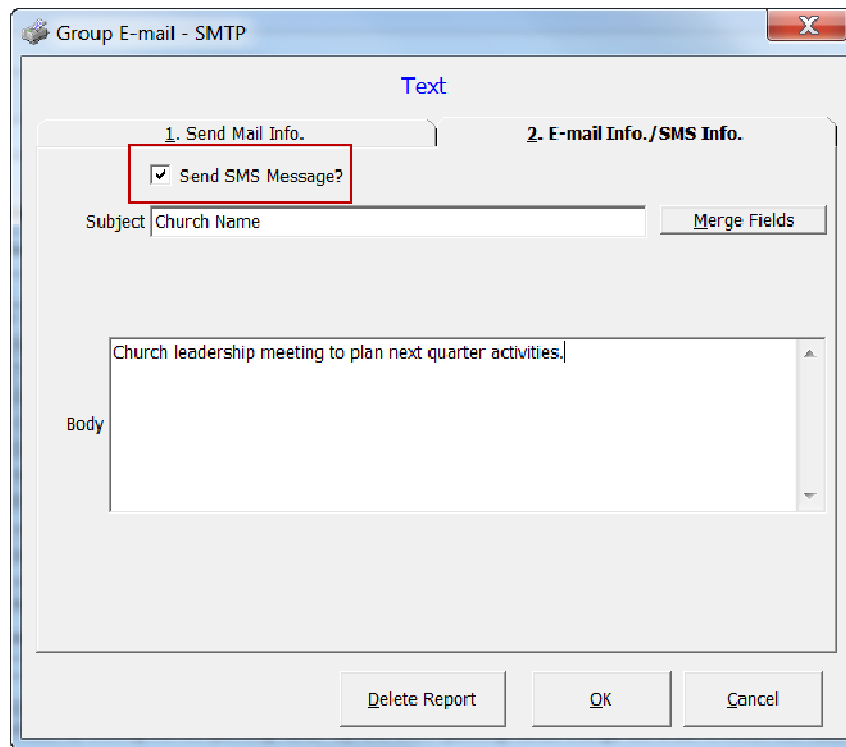
7. Choose **File > Close** to return to the Home Base.

The Control Table Information utility allows you to delete and to edit cell providers as well as add them.

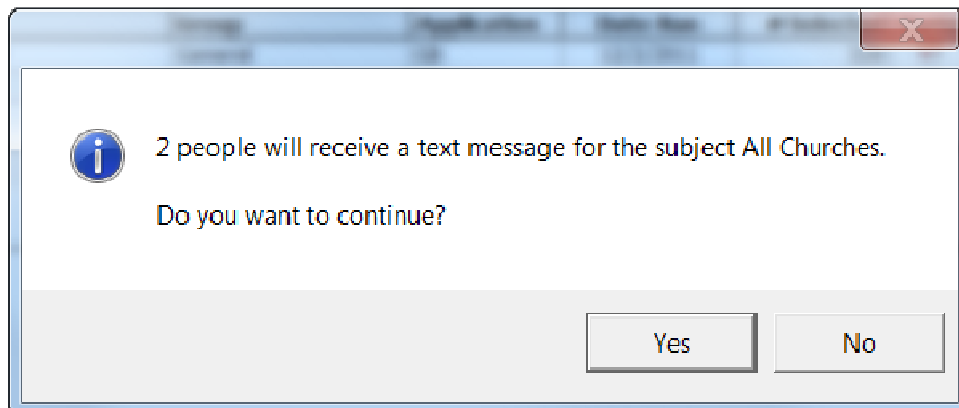
## Send a text message from Selections and Listings.

Sending a text from Selections and Listings is quite similar to sending an email. Follow the steps below to send a text from Selections and Listings.

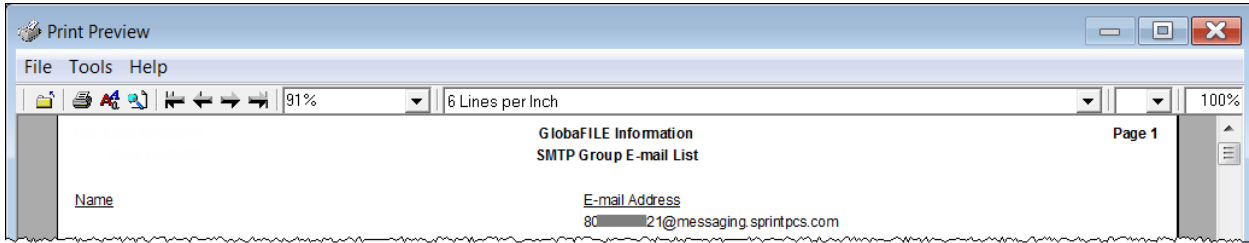
1. Start a new report in Selections and Listings.
2. Give the report a name that reflects the type of selected names and the purpose of the report, such as "Txt Msg to Area Churches."
3. Set up the Criteria to select the desired names.
4. Under Reports, choose the **Group Email – SMTP** output.
5. Fill in the **Send Mail Info.** tab with the SMTP server information if it is not pre-loaded with the correct information.
6. On the **Email Info./SMS Info.** tab, place a checkmark next to Send SMS Message. This will inactivate all of the options on the tab except for the Subject and Body.
7. Enter a message into the **Subject** and **Body** portions of the tab. Note the following facts about the content of the message:
  - a. In an SMS text message, whatever you type in as the Subject will be appended in front of the Body. For the recipients who get the message as an email, the Subject and Body will be in the usual places.
  - b. If the message is longer than 160 characters, SMS text recipients will receive multiple text messages. Remember to count both the Subject and the Body.
  - c. The Merge Fields button allows you to add personalized elements to the Subject or Body, just as you can do with an email message.



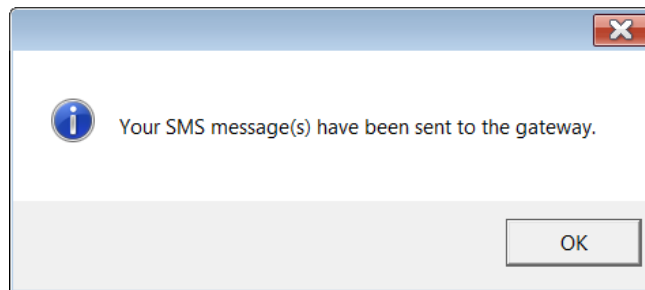
8. When you have finished typing in the message, click OK.
9. Save, close, and run the report as usual.
10. You will receive a message similar to the one shown below. The number at the start of the message is the number of selected names. However, this is not necessarily the actual number of text messages. Those without a cell phone and cell phone provider will not receive a text. This message is primarily a way for you to double-check that the number of selected names matches your expectations for the results, and it is a last opportunity to cancel the message.



11. When you click Yes, Shelby v.5 will send the message out to the selected names. You will receive a report after the message has been sent showing the email addresses used for the text and email messages. (The phone number in the illustration has been obscured for privacy reasons. They are not obscured on the actual report.)



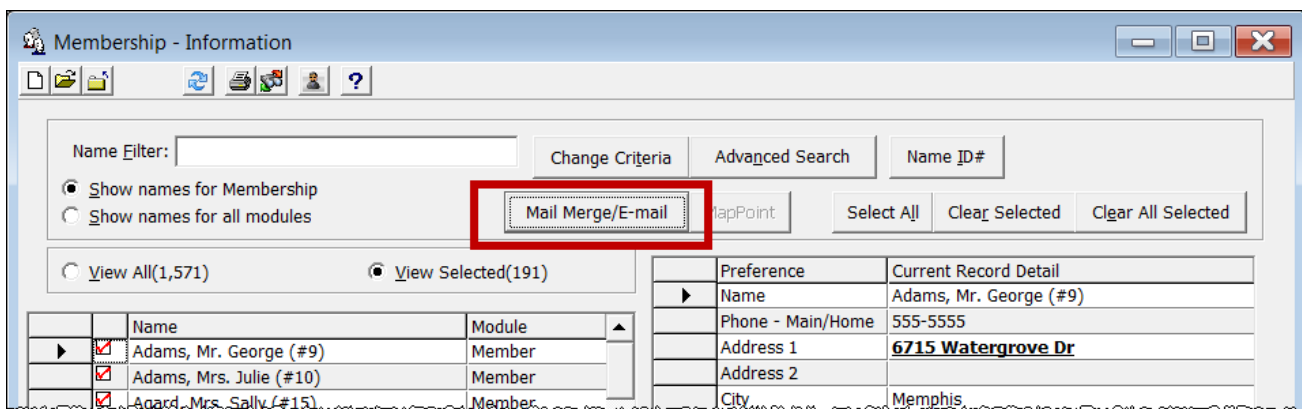
12. Finally, click to acknowledge that the messages have been sent.



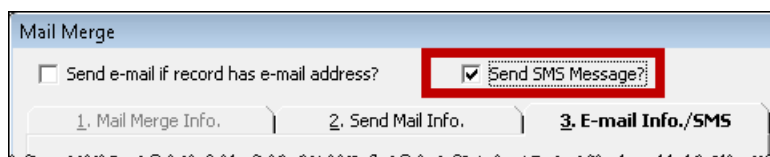
## Send a text message from a name list.

The name list found in EZView, Membership Information, GlobaFILE Information, and elsewhere in Shelby v.5 includes a tool for generating a mail merge file or a bulk email (or both) for a set of selected names. Beginning with Shelby v.5.10.1000, this tool now also includes the ability to send SMS text messages.

1. Select the names to receive the text message. There are many ways to select the names, and it does not matter which method you use.
2. After the desired names are selected, click the **Mail Merge/Email** button.



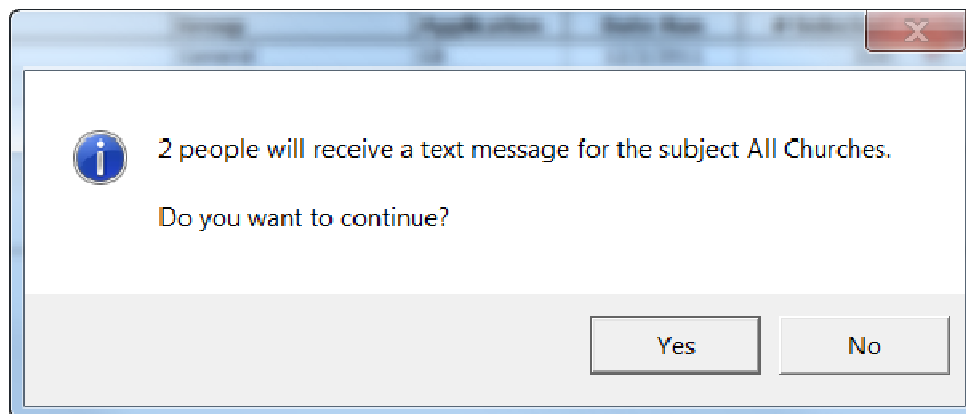
3. Check the box to **Send SMS Message**. You can select either to send an email message or to send an SMS message, but not both. (**Note:** The option to send an email message to those missing Cell Phone carrier information is scheduled to be added in v.5.11.)



4. Make sure the **Send Mail Info.** tab has complete and accurate information on it, just as you would to send an email.



5. On the **Email Info./SMS** tab, enter a message into the **Subject** and **Body** portions of the tab. Note the following facts about the content of the message:
  - a. In an SMS text message, whatever you type in as the Subject will be appended in front of the Body. For the recipients who get the message as an email, the Subject and Body will be in the usual places.
  - b. If the message is longer than 160 characters, SMS text recipients will receive multiple text messages. Remember to count both the Subject and the Body.
  - c. The Merge Fields button allows you to add personalized elements to the Subject or Body, just as you can do with an email message.
6. Click OK to send the message.
7. You may receive messages about overwriting existing files. Choose **Yes** to replace the prior selection of names with the current selection. Choose **No** to add the current selection of names to the prior selection and send the message to both.
8. You will receive a message similar to the one shown below. The number at the start of the message is the number of selected names that have a cell phone and provider. This message is primarily a way for you to double-check that the number of selected names matches your expectations for the results, and it is a last opportunity to cancel the message.



9. When you click on **Yes**, Shelby v.5 will send the message to the recipients. If you click No, Shelby v.5 will not send any text message.

# Manually Export Names and Email Addresses from Shelby v.5 to Constant Contact®

The manual export/import method described below is the preferred method for **Shelby v.5.10** and earlier or if you prefer to manually create a CSV file to export your names from Shelby. There is a direct method we will discuss in a few pages.

## Create Export File in Shelby v.5

The first thing you need to do is create the export file in Shelby v.5. To do this, create a Selections and Listings report. Choose the criteria you like, making sure to include the **Address, Email Address** criteria (including **?\***) so that only individuals with email addresses are selected. (You could also choose only a certain domain, such as [\\*@att.net\\*](#) OR you could insert **\*@\*** in the criterion to be sure that all entries in this field contain the @ symbol which is in all email addresses from all email domains.)

Address, E-mail Address

Const Contact CSV Export

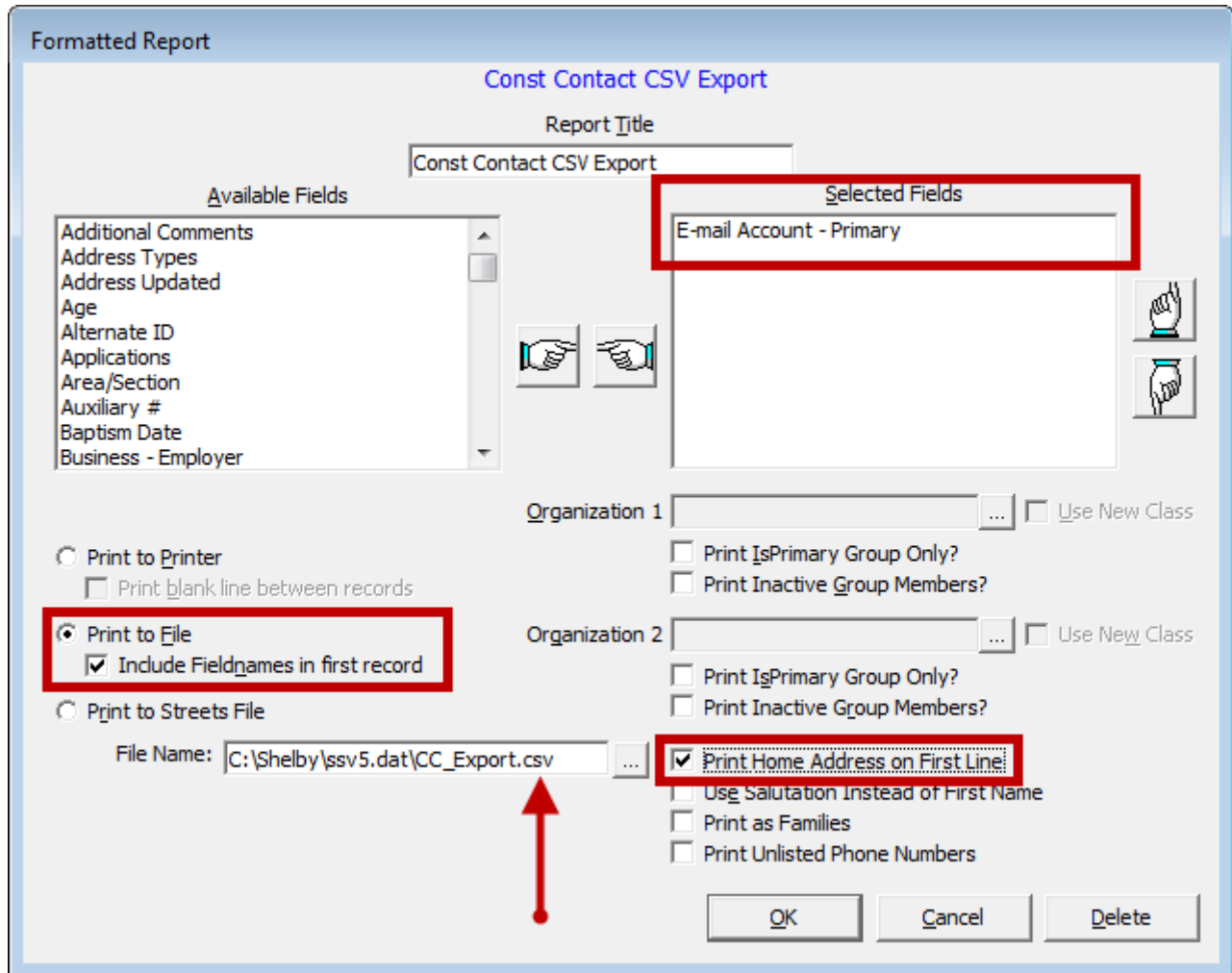
Include

Omit

Search All Addresses (Uncheck for Primary only)

\*@\*

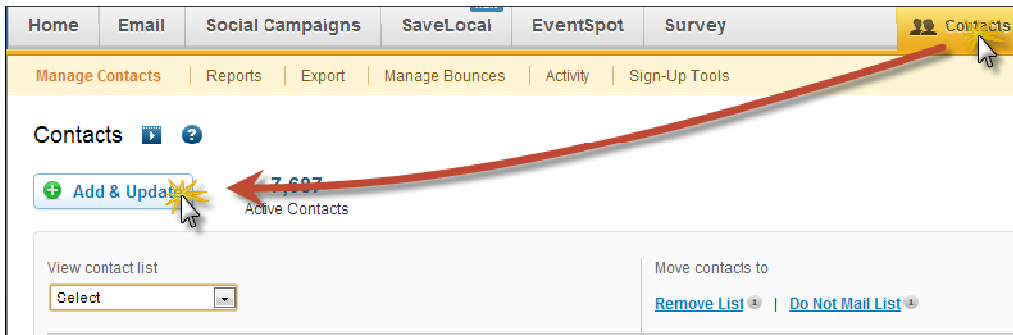
For the report type, your best option is **Formatted** because you can select which fields you want to export, making sure to include **Email Account - Primary**. Put a checkmark beside **Print Home Address on First Line**. You will also want to select **Print to File** and place a check next to **Include Fieldnames in first record**. Use the **File Name** field to specify the location and name of the file. We recommend using the **.csv** file extension.



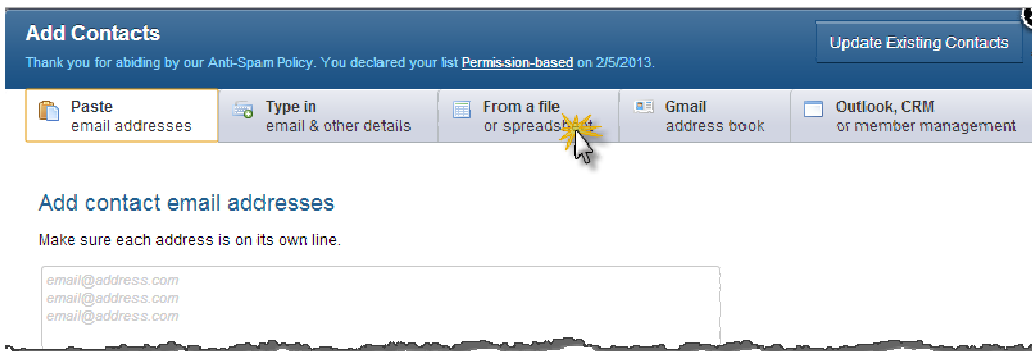
After you have finished setting up your report, **Save**, **Close**, and **Run** the report. This will create the **CSV** file in the location you specified.

## Import the Exported CSV File into Constant Contact®

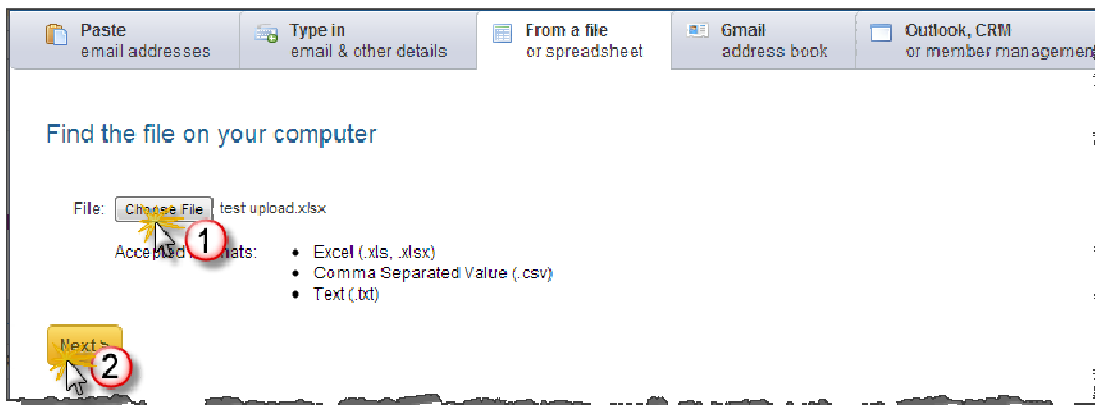
These are the basic steps for importing your exported **CSV** file into Constant Contact®. If you have any further questions about this side of the process, we recommend you contact Constant Contact® (their support page is <http://www.constantcontact.com/support/index.jsp>) for further assistance. To get started, log in to the Constant Contact® web site and then navigate to the **Contacts** tab. You can then click the **Add & Update** button.



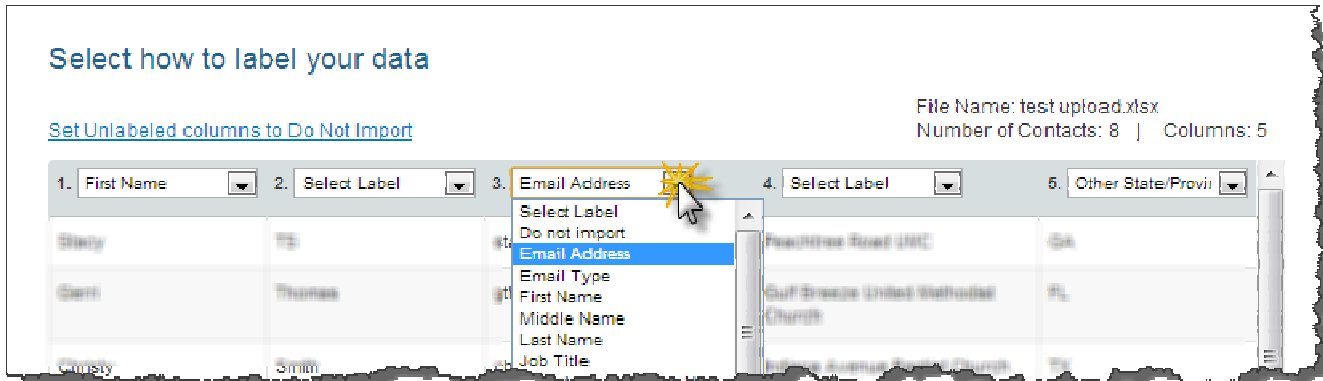
Click on the **From a File or Spreadsheet** tab.



Click to ❶ Choose File from your computer or network and then click ❷ Next.



You may be asked to match the columns (exported fields from Shelby Systems v.5) in your **CSV** file to fields available in Constant Contact®. If you exported fields from Shelby v.5 for which there are not set columns available in Constant Contact®, you can create custom fields for your personal use. These will be available on all subsequent lists. You also have the option not to import certain columns that are not necessary. Click the NEXT button when you have matched all of the fields.



Now, you can choose to insert these records into a **1** NEW LIST, if needed, or you can **1** select an EXISTING LIST. You can then click the **2** SUBMIT button.



Once imported, your new or updated list will be available for any emails created through Constant Contact®. The list will not be dynamic, so you will need to rerun the Shelby v.5 export and reimport into Constant Contact® to update your list.

The Selections & Listings **Constant Contact Upload** report output method described below is the preferred method for Shelby v.5.11 and later.

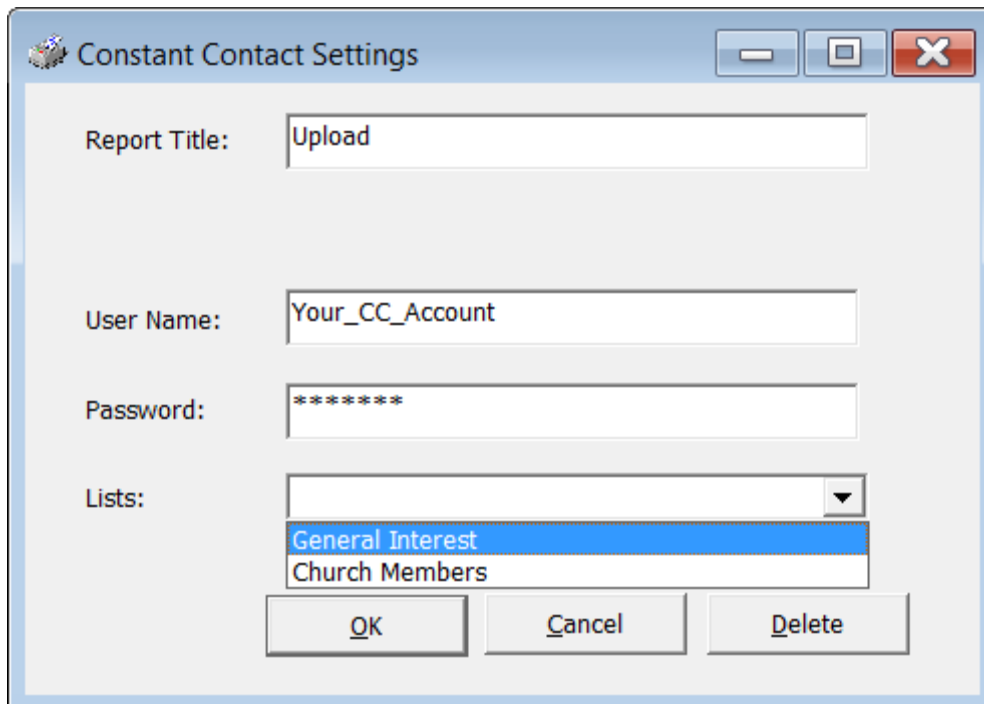
## **Prepare your Constant Contact® account to receive names from Shelby v.5.**

Before you can upload to Constant Contact®, you need to have an account with them and also have a list prepared to receive the names from Shelby v.5. Assuming you already have a Constant Contact® account, the following steps will help you prepare a list to receive data using the **Constant Contact Upload** report in **Selections and Listings**. If you already have a list ready, skip to the next topic.

1. Log into your Constant Contact® account.
2. Click on the **Contacts** tab.
3. Click on **Create New** under the My Lists section of the page.
4. Enter the **List Name**. Give the list a name that you will easily recognize when you are ready to upload into it.
5. Optionally, check the boxes for **Join My Mailing List Form** and **Autoresponder**, depending on your preferences.
6. Click **Save**.

## Create a Selections and Listings report that selects the desired names and uploads them to Constant Contact®.

1. Start Selections and Listings and create a new report.
2. Define the **Criteria** to select the names you want to upload to Constant Contact.
3. Under Reports, double-click the **Constant Contact Upload** report type.
4. Enter a **Report Title**. The title is not optional, but it does not appear in any output.
5. Enter your Constant Contact® **User Name** and **Password**.
6. Click on the drop-down option at the bottom of the window. It will take a moment to populate with your Constant Contact® **Lists**. Once the drop-down opens up, choose the appropriate list.
7. Click **OK**.



The image shows a screenshot of a software dialog box titled "Constant Contact Settings". The dialog box has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside the dialog, there are four input fields and a dropdown menu. The "Report Title" field contains the text "Upload". The "User Name" field contains "Your\_CC\_Account". The "Password" field contains seven asterisks "\*\*\*\*\*". The "Lists" dropdown menu is open, showing two options: "General Interest" (which is highlighted in blue) and "Church Members". At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Delete".

8. Save, close, and run the report.

9. The system will select the names based on your criteria and then upload names and email addresses to your Constant Contact® list. The following facts are true about the upload process:
  - a. Only name and email address are uploaded to Constant Contact, no other information.
  - b. If the name has no email address on record, it will not be sent to Constant Contact.
  - c. If the email address is already in the Constant Contact® list, it will not be uploaded again.
10. You will see a reminder that it may take several minutes for Constant Contact® to process the upload. Click **OK** to acknowledge the message.





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Mark Fisher has been a Shelby Independent Trainer since 1998 and currently serves Shelby customers as a Shelby Consultant. He was previously the Business Administrator at Shandon Baptist Church in Columbia, SC where he gained valuable experience with Shelby software programs. Mark's unique blend of skills and experience allows him to bring practical knowledge to the ministry organizations he trains full time.