



Shelby Systems, Inc. Windows Instructions

How to Create an Envelope Mailing File in Shelby for Windows

The following is an example of how to create a mailing file providing the information needed to print and send contribution envelopes.

- 1) Click **Utility** from the **Home Base** screen.
- 2) Click **Create Envelope Mailing Disk** from the pull down menu.
- 3) Type your **File#**
- 4) Choose the records that should be included. You will need to decide which of the following options you want:
 - **Include Inactive Individuals**
 - **Include All with Envelope #**
 - **Include Only Selected Individuals**
- 5) Choose the **Which Address Type?** You wish to use from the drop down list. We support up to two lines of Street Address.
 - **Main/Home Address**
 - **Other Address Defined also Display**
- 6) Choose how to show couples names.
 - **Show couples as Mr. & Mrs.**- This selection prints the Titles followed by the Head of Household's last name. This is what you should choose
 - **Show couples as His or Her Names.**-Do **NOT** choose this option.
- 7) Choose where you want to create the **File Shelby.env**.
 - **In (data directory e.g. c:\shelby\ssv5.dat)**-If you are e-mailing your file, you need to remember exactly where you had the file created.
- 8) As **Quote and Comma Delimited**- This is the format we prefer
- 9) Decide whether or not to check **Use Next Year Envelope #**.
- 10) The Contribution Information asked for is not needed for the Monthly Mail Program.

For additional assistance, please visit <http://www.shelbysystems.com/> or call 1-888-697-4352.