

Shelby Export Instructions

Begin in the Membership Home Base

- Select Reports and choose Selections and Listings
- Create a new report by selecting
 - FILE from the top menu,
 - then select NEW
- Shelby will ask to select modules.
 - Globafile and Membership should be highlighted,
 - Click OK.
- Enter a report name into the second field next to Report Name
 - Example – **Offering Envelope Export**
- Under the Reports Window
 - Double click Formatted (All).
- Under the report options in available fields
 - Double click Envelope # - Current and Address Types...putting them into the Selected Fields window.

In the bottom left corner, there are three radio buttons

- Choose Print to File
- A field **FILE NAME** appears below the Print To Streets File option,
 - To the right of this field click the box with three dots.
 - Choose a save location,
 - enter a file name and the file name needs .csv at the end of it,
 - example : **your OSV account number _ your OSV order number.csv**
 - **123456_12345.csv**
 - Change the Save As type to ALL FILES.
 - Click Save.
- Click OK and Shelby will ask to choose Address Types.
 - Select Main/Home – or the appropriate address type, and click ok.
- Now save the report by clicking the SAVE icon in the toolbar,
- Click the CLOSE folder icon next to it.
- Select the report
- RUN it – clicking the blue running icon in the toolbar.

The report will include all active members.

For filtering the report – The customer may edit the criteria as they would any Selections and Listings report.

The report will create the file when it is run...it will not open automatically. Browse to the .csv file and open it.

Some columns will need to be adjusted,

- The ENV numbers do not print first,
 - move the column to the first column
 - Remove any unwanted columns to match format.

Attached is an example