

Envelope Numbers

Entering an Envelope Number for an Existing Person

Because Shelby is an integrated system, most, if not all, names and addresses should already be in the database. In those cases, the only entry that needs to be made is the envelope number for an individual or couple.

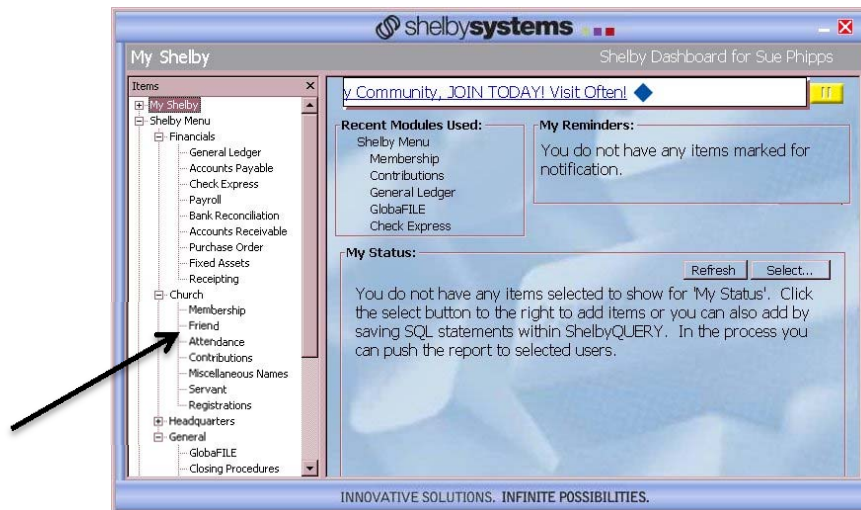
The following steps will allow you to add or update both Member and Friend envelope numbers.

Quick Steps – Envelope Number

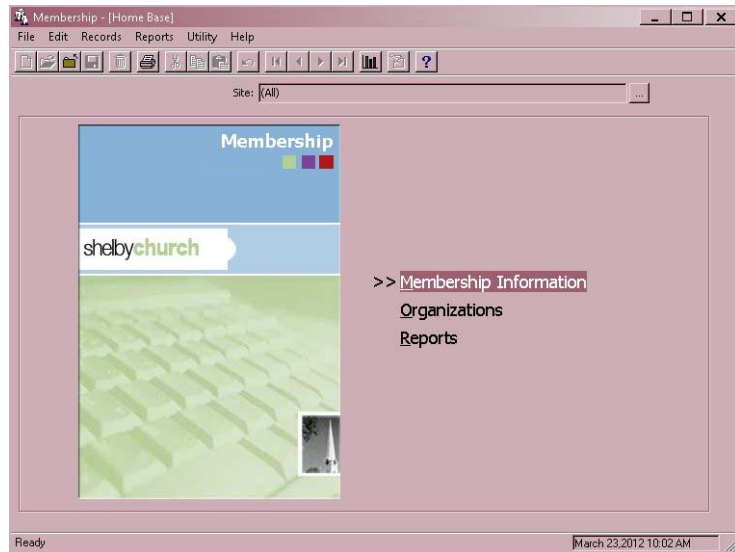
Shelby System — Membership — Membership Information — (pick a name) — Individual Information — Assign Envelope # — (check boxes) — Pledge with Spouse — Include on Envelope Diskette – Save and Close

Detail Steps – Envelope Number

1. Go to the main **Shelby System** menu and click on **Membership**.

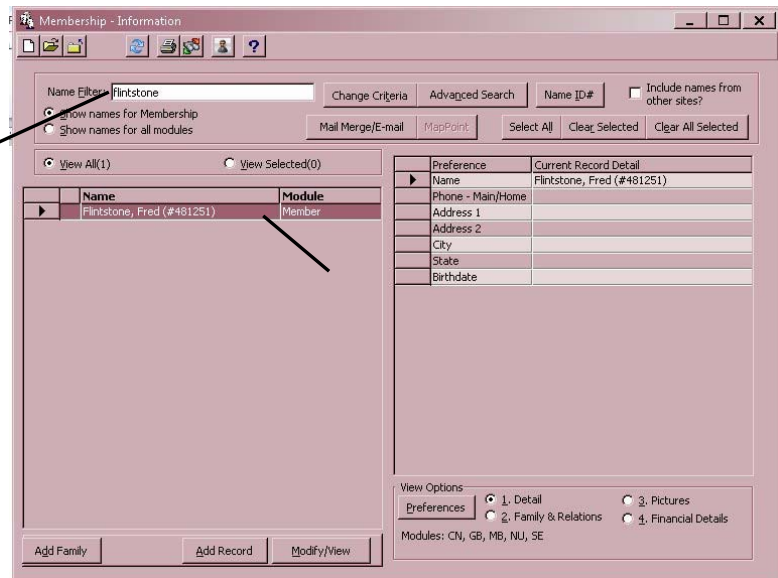


- Click on the **Membership Information** button. The Membership-Information screen will appear

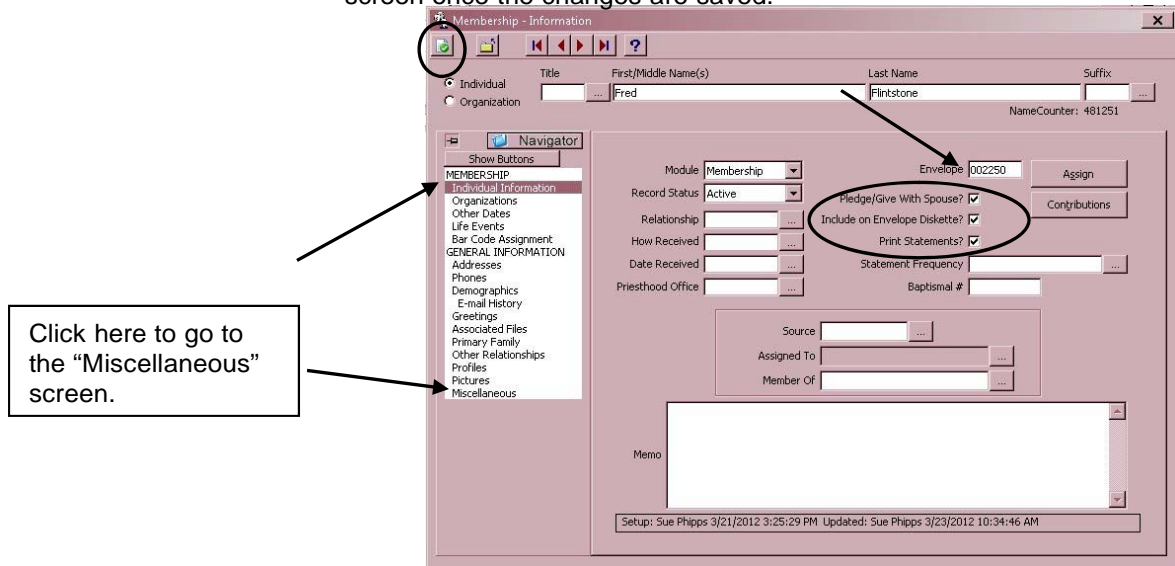


- Type in the **Last Name** of the person in the name filter and click the Enter key on your keyboard. (Note you will get all persons with that last name.) If a person has multiple entries, use the **smallest** Shelby ID number (the number after the name).

Double click on the person you want to add or whose envelope number you want to update.



- On the Individual Information screen that appears, enter your next consecutive envelope number. (A list of currently assigned envelope numbers can be gotten by referring to the section titled Envelope Master List.) The number range for adults is 1 – 5999 and for children 7000 – 8999. **All envelope numbers should be four digits.** The envelope number will also appear on the Miscellaneous screen once the changes are saved.



- On the same screen (Membership Information), place a check in the boxes **Include on Envelope Diskette?** and **Print Statements?**. This is important so that the individual will receive envelopes by mail. It also ensures that a statement, or receipt, will be provided. If the individual is married, place a check in **Pledge with Spouse?**, which will ensure that both are included if a pledge system is conducted in the congregation.
- Statements are automatically generated on a quarterly basis. There is no need to put anything in the **Statement Frequency** box. (See **Printing Statements** later in the guide.)
- Click on the **Save and Close** icon. The envelope number has now been assigned.

Note: You as the financial officer should *not* make any changes to the person's record. Check with your recorder if you feel that information, such as address, phone number, etc., should be added or changed.

- Click **Close** on the next two screens. You are back to the Main Menu.

Entering a Name, Address, and Envelope Number

Generally, it is the responsibility of the recorder to maintain names and addresses for the church. This includes member "Transfers In" and new "Friends" of the congregation. However, there may be instances where a person, or family, makes a financial contribution and their name(s) is *not* in the system. These instances could include:

- They are not a member but regularly attend and contribute. These individuals should be entered into the system as a FRIEND.
- They are a member of the church but *not* your congregation. These individuals should be entered as MISCELLANEOUS NAMES.
- They are a *member* of the church and are *transferring in* to your congregation, but the recorder has not completed the transfer. These individuals should be entered as MISCELLANEOUS NAMES until the transfer is complete.

In order to provide a receipt or contributor's statement for contributions made, the following instructions identify the steps necessary to add a person to the system. It is sound practice to provide a receipt or statement for all financial contributions.

Required data

- Full names (First, Middle and Last Name)
- Main/home address (the address where mail should be sent)
- Salutation (the name the person normally goes by)
- Branch (congregation) number

Optional data

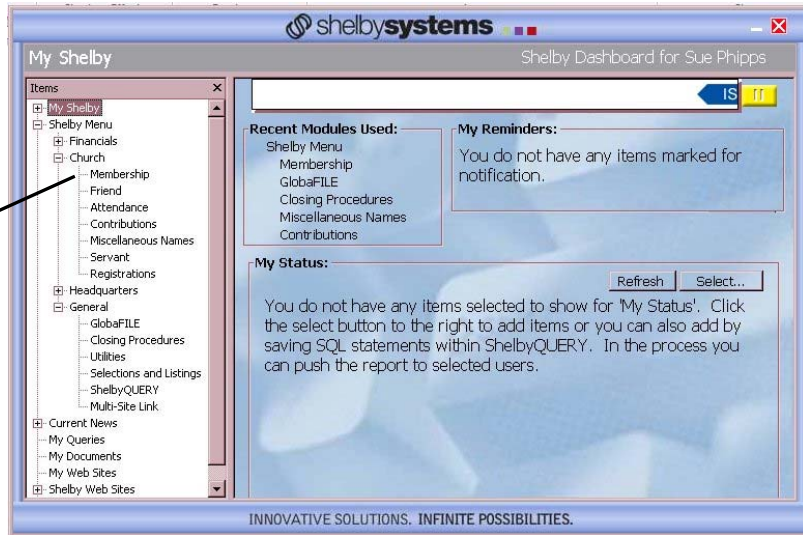
- Family alternate address (if a P.O. Box is used in the main/home address, then this would be the physical address of the home)
- Main/home telephone number
- Birth date
- Gender
- Marital status
- Envelope number (normally not needed)

Quick Steps – Name, Address, and Envelope Number (if used)

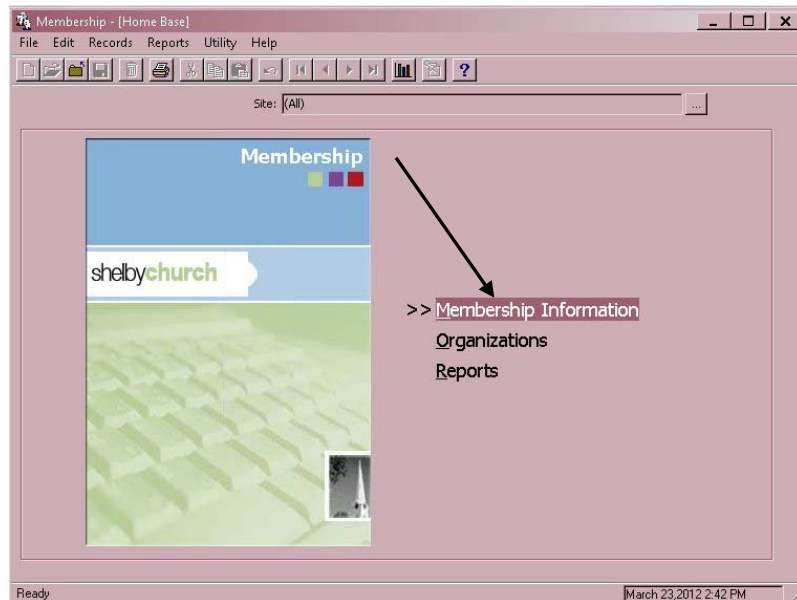
Shelby System — Membership — Membership Information — Add New Person
— First Name — Addresses — Phones — Individual Information —
Miscellaneous Names — Miscellaneous — Congregation # — Close

Detail Steps – New Entry

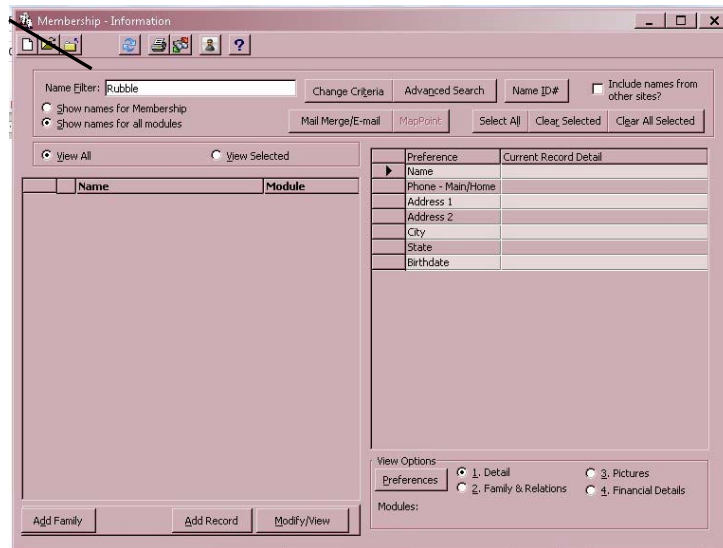
1. Go to the main Shelby Systems menu and click on **Membership**.



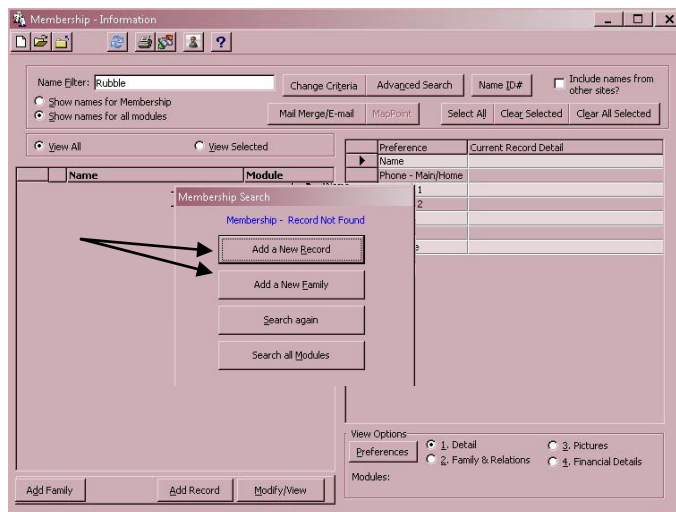
2. Click on **Membership Information**.



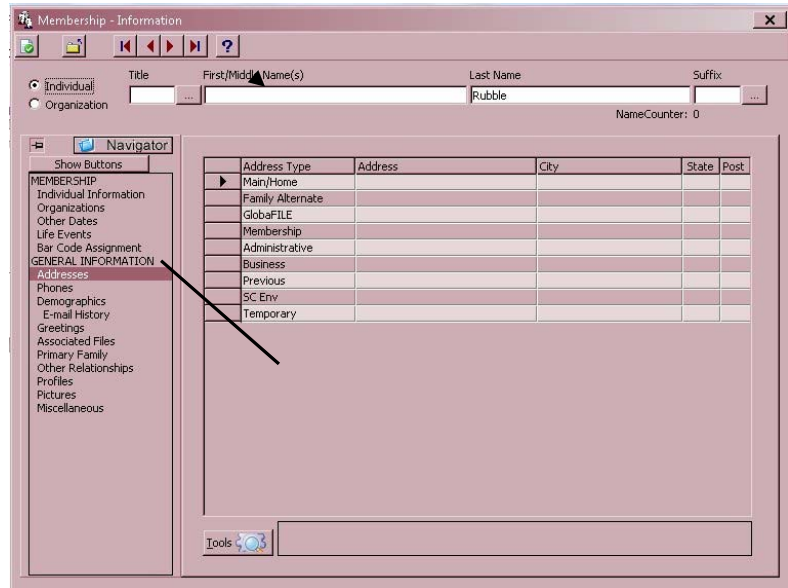
3. Type in the person's **Last Name** and **Enter** on your keyboard. Be sure to select the radio button for **Show names for all modules**.



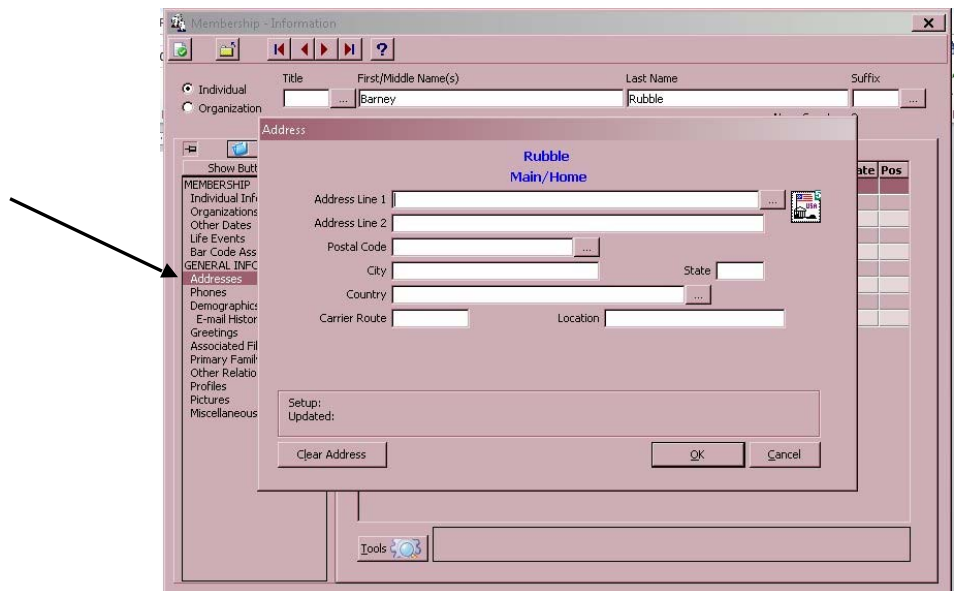
4. If the name entered is *not* in the system, the screen will indicate there are no records for these criteria. Click **Add a New Record** or **Add a New Family**.

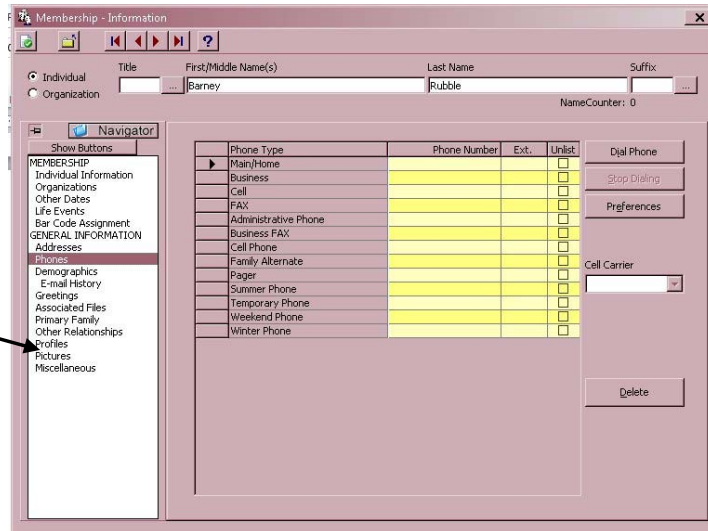


- Choose **Enter a New Record or Enter a New Family** and you will get the following screen.
- Enter the individual's **Name**. Add the First and Middle names to the **First Name** box. Do not add both spouses' names in one record. Each person should be entered separately.

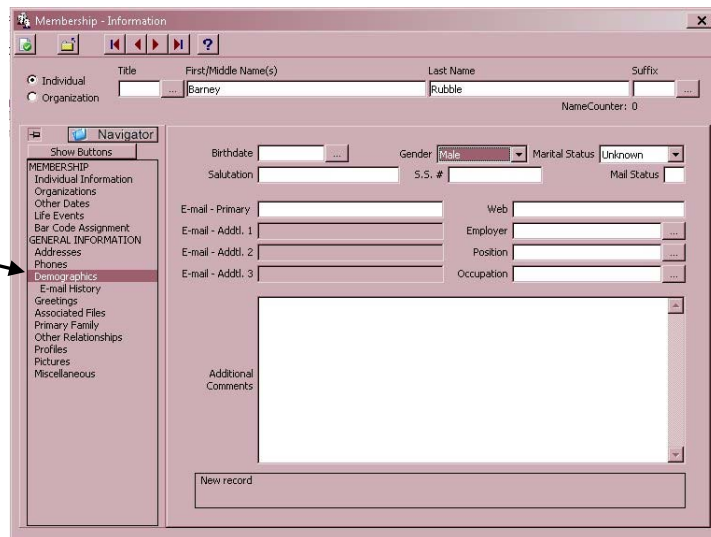


- Click on **Address** and then double click the Main/Home Address line. On **Address Line 1**, enter the address where the person wants their mail delivered. It could be a street address or a Post Office Box (P.O. Box). Enter the **Postal (Zip) Code**, **City**, and **State**. Enter **USA** under Country, or click on text box at the right and select country. Click **OK**. Note that the automatic MailRoom Software *may* fill in several of the boxes once the Postal Code is entered.





8. Click **Phones** and add the Main/Home telephone number. No punctuation is needed.



9. Click on **Demographics**.

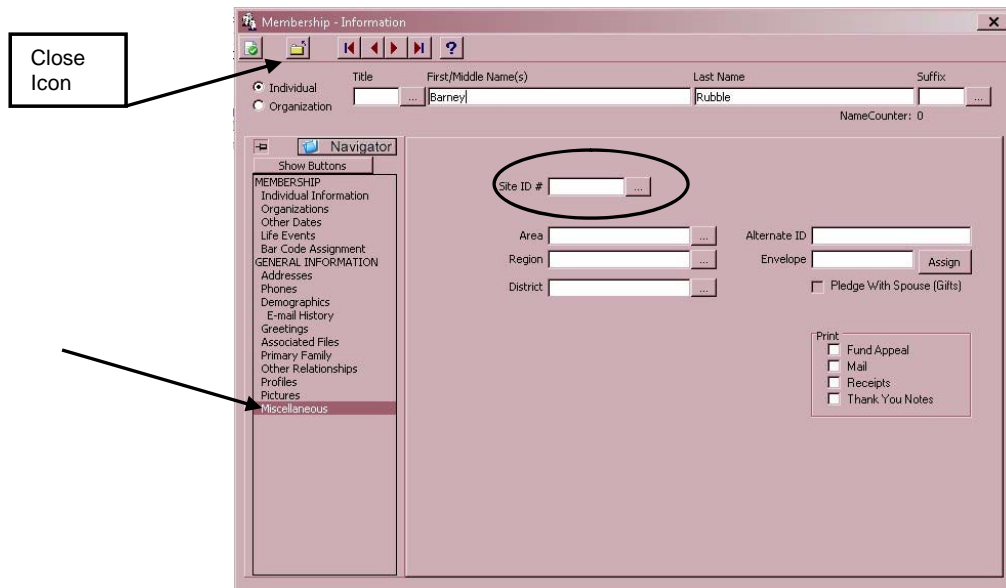
10. Type the **Birthdate** in mmddyyyy format if known. The **Age** is automatically calculated.

11. Type the **Gender** or choose from the drop-down list. (Unknown, Male, Female)

12. Type the **Marital Status** or choose from the drop-down list. (Single, Married, Divorced, Separated, Widowed)

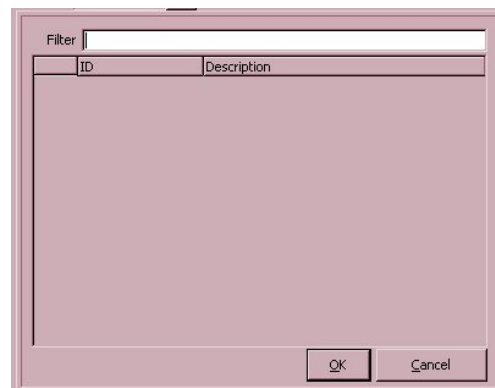
13. **Salutation** is what this person normally uses as a first name. The individual's first name will automatically appear in this field. If a different salutation is desired, type that name in the space.

14. **Mail Status** is to remain blank as the default for mail delivery. Only put an **N** in the field if the person has requested *no* mail be sent from the congregation or World Church. **U** would be added if the address is undeliverable.



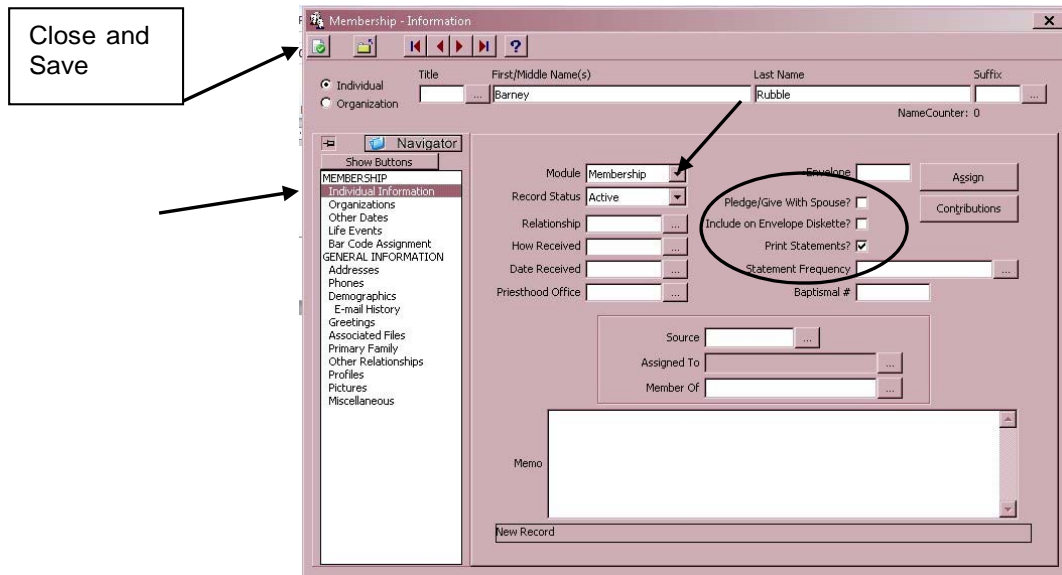
15. Click on **Miscellaneous** to view the **Site ID #** (congregation number assigned by Membership Records). Enter the four-digit number that identifies your congregation.

If you are unsure of the congregation #, click on the button to the right of the window. The following screen will appear:



16. Click **Enter** on the keyboard to display a list of branch (congregation) names and corresponding numbers. Select *your* congregation. (It will highlight in blue). Click **OK**.
17. The use of an envelope number is optional. Enter the envelope number if one has already been issued to this person. **Do not use the Assign button. Envelope numbers must be four (4) digits long.** The number range for adults is 0001 – 5999 and 7000 – 8999 for children.

18. Click on Individual Information.



19. In the **Module** box, click on the downward arrow box to show a drop-down box with choices:

- a. Enter this person as a **Friend** if he/she has *not* been baptized.
 - b. **Membership** would generally be entered by the recorder after the person is baptized or through a transfer.
 - c. Enter this person as **Miscellaneous Names** if you know the person is a member of another congregation. Use this also if an organization or group has made a contribution.
20. If the **Envelope #** was *not* entered earlier, add it now if one has been issued. **Envelope numbers can only be four (4) digits long.** The number range for adults is 1– 5999 and 7000 – 8999 for children.
21. Click on the box next to **Pledge with Spouse?**, This will put a checkmark in the box, choosing this option. If the contributor is *not* contributing with their spouse, leave this window blank. (Pledge with Spouse means contributing with your spouse, using the same envelope number, and receiving a joint statement).
22. Click on **Include on Envelope Diskette?** to be included in the Envelope Mailing Program.
23. Click on **Print Statements?** if you intend to provide a receipt or statement to the contributor. This operation can be done at a later time if you are unsure.
24. Leave the **Statement Frequency** window empty. Statements are automatically generated quarterly. (See **Printing Contribution Statements.**)

25. At this point the *required* (and perhaps *optional*) information has been. Click the **Save and Close** icon (see screen above) and **Close** again to return to the Membership – Shelby – [Home Base].