




What is the Shelby Community?

The Shelby Community is your 24-7 resource center for all Shelby Systems platforms. Use the powerful Search tool to quickly locate answers and solutions in the knowledge base of videos, documents, updates, and discussions. In the Community you can connect with the whole family of Shelby Systems users. It is a place to ask and answer questions, express opinions, and share ideas about Shelby Systems solutions.

Why should I join the Shelby Community?

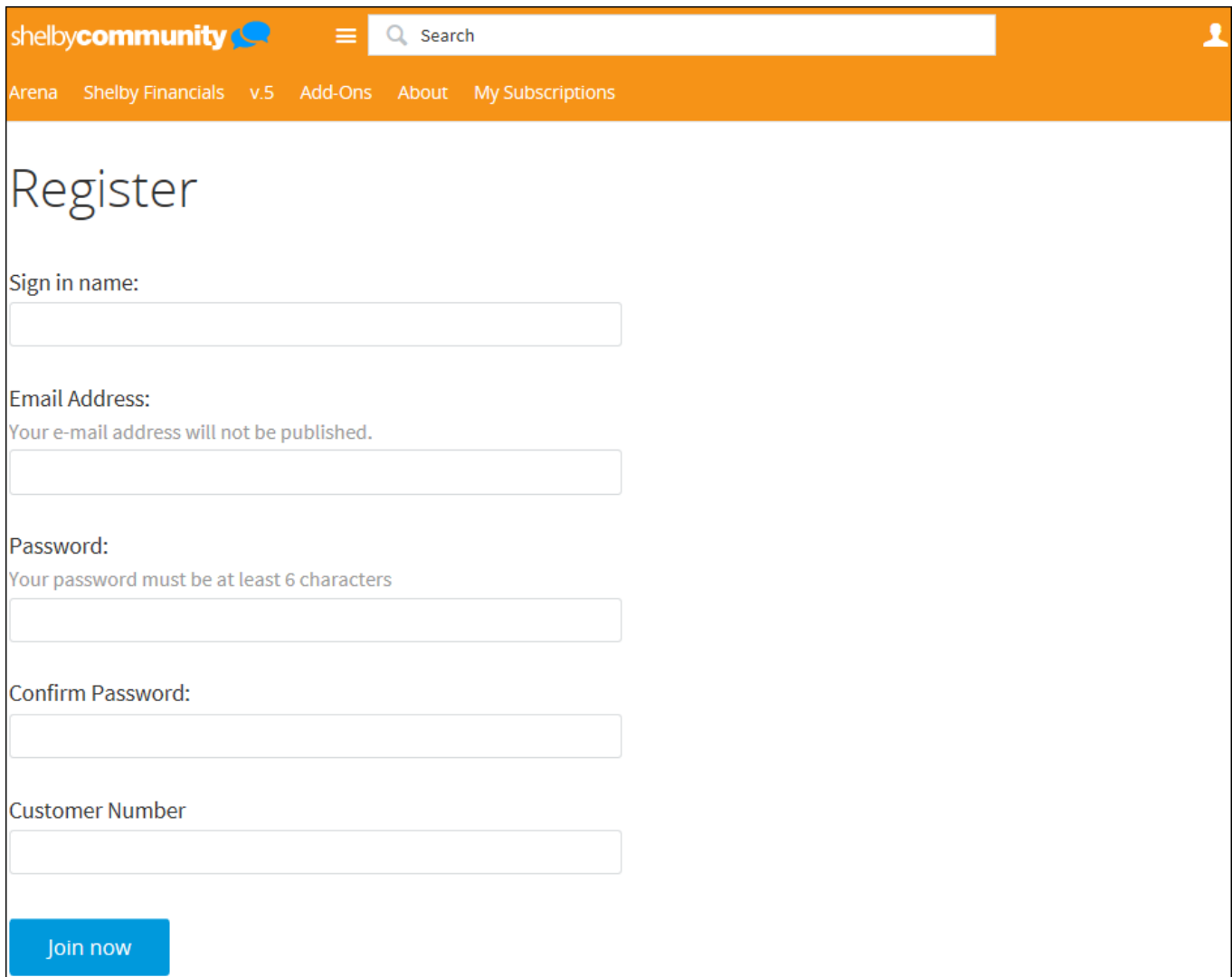
- Be among the first to hear about important announcements.
- Connect with other Arena, Shelby Financials, and v.5 users in the Community so you can learn from each other.
- Find answers to your questions in the knowledge base.
- Easily access documentation and training videos.
- Download software updates quickly and conveniently.
- Receive automatic notification about the forums to which you are subscribed.
- Stay connected. Stay **informed**.

How do I join the Shelby Community?

Joining the Shelby Community is simple. Go to <http://community.shelbysystems.com> to start the registration process. Once there, click the **Join or Sign in**  icon at the top right of the page.



Click the **Join Here** link and then enter your desired **Sign in name** and **Email Address**. Enter a **Password** and confirm it in the **Confirm Password** field. Enter your Shelby Systems **Customer Number** in the field provided and click the **Join Now** button.



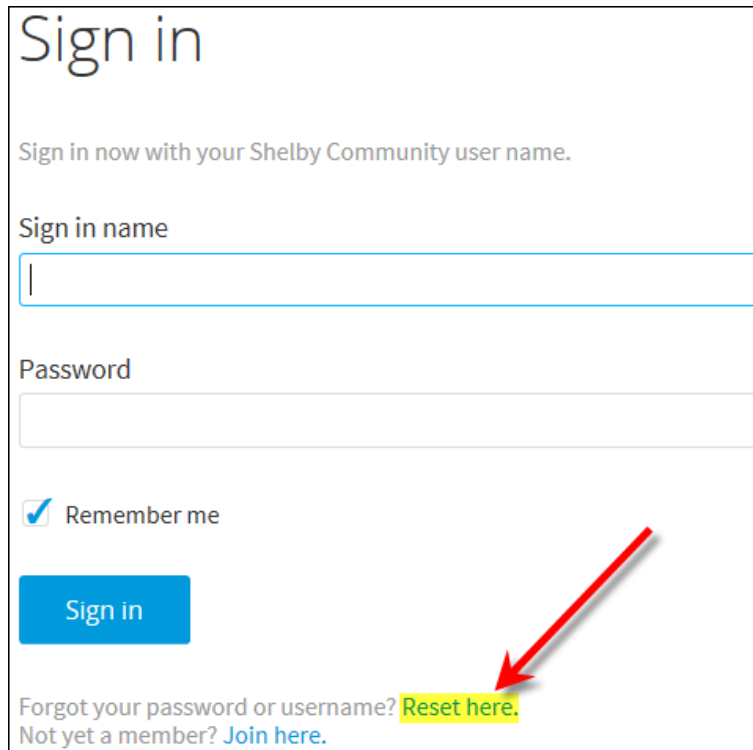
The screenshot shows the registration page for the Shelby Community. At the top, there is an orange header with the 'shelbycommunity' logo, a search bar, and navigation links for 'Arena', 'Shelby Financials', 'v.5', 'Add-Ons', 'About', and 'My Subscriptions'. The main heading is 'Register'. Below this, there are five input fields: 'Sign in name:', 'Email Address:' (with a note 'Your e-mail address will not be published.'), 'Password:' (with a note 'Your password must be at least 6 characters'), 'Confirm Password:', and 'Customer Number'. A blue 'Join now' button is located at the bottom left of the form area.

You will receive visual confirmation that your account has been created and that you are signed in. Follow the **update your profile** or **home page** links or just click the **OK** button to go to the main page of the Shelby Community.

Note: You will automatically receive access to content in all groups (**Shelby Financials, v.5, Arena**) for which your organization is current on Support. To verify you have the correct access, click a Group (e.g., **v.5**) and look for the **Forums** link. If you do not see this link, and you are current on Support for that product, please contact us by emailing thecommunity@shelbyinc.com.

Password Reset

If you forget your Shelby Community password you can click the **Reset here** link on the **Sign in** page.



Sign in

Sign in now with your Shelby Community user name.

Sign in name

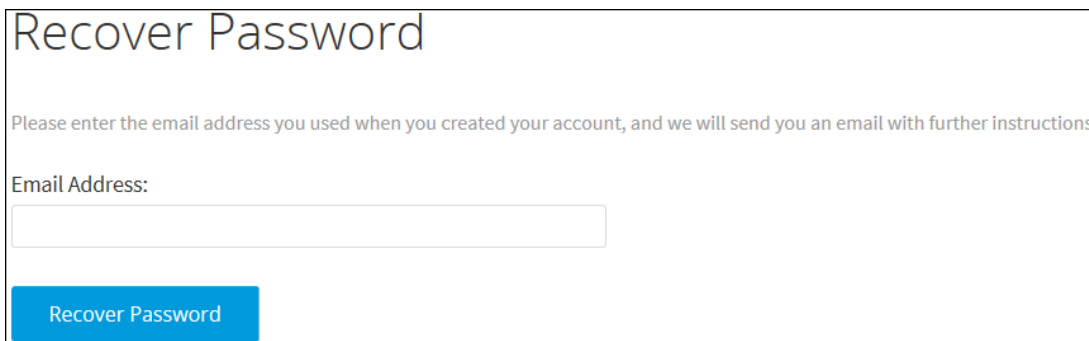
Password

Remember me

Sign in

Forgot your password or username? [Reset here.](#)
Not yet a member? [Join here.](#)

Enter the **Email Address** associated with your Shelby Community account in the field provided on the **Recover Password** screen and click the **Recover Password** button.



Recover Password

Please enter the email address you used when you created your account, and we will send you an email with further instructions.

Email Address:

Recover Password

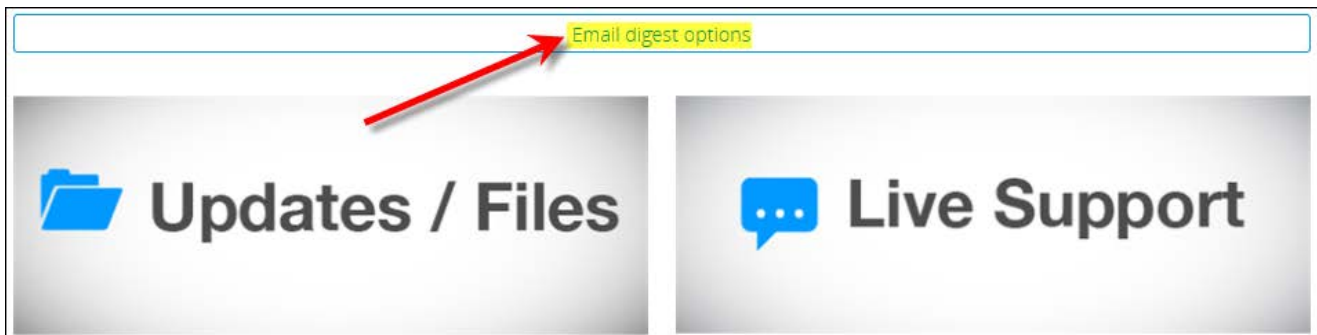
Once you receive the email, click the link to access the **Change Password** page. Enter your desired password in the **New Password** and **Re-enter New Password** fields and click the **Change Password** button. Your new password takes effect immediately.

Keeping up to date with the Shelby Community

Once you join the Shelby Community, the next step is keeping up with new forum posts. You can sign up for an **Email digest** on a per-group basis or subscribe to **Forum notifications**.

Email digest

Access a group and look in the middle of the page. Click the **Email digest options** button.



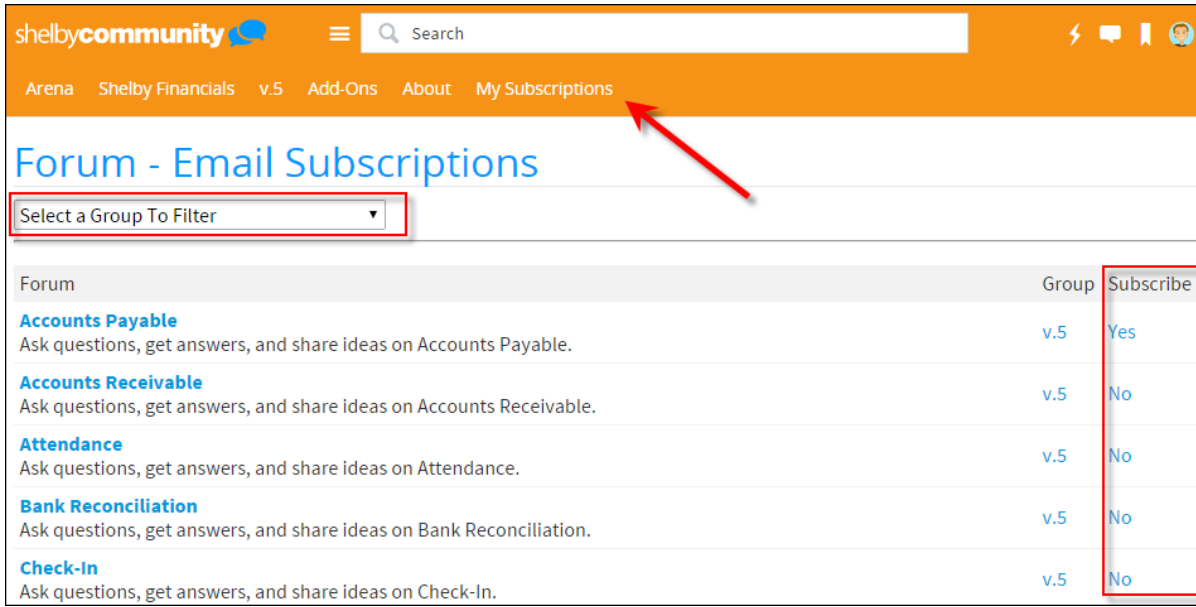
Select **Daily** or **Weekly** from the **Frequency** pull-down menu and then click **Save**.

A screenshot of the 'Email digest options' form. The title is 'Email digest options'. Below the title, there is a 'Frequency' label and a pull-down menu. The menu is open, showing four options: 'Not Subscribed', 'Not Subscribed', 'Daily', and 'Weekly'. The 'Daily' option is highlighted in blue.

You will receive daily or weekly digest emails of activity for each group for which you have enabled the digest.

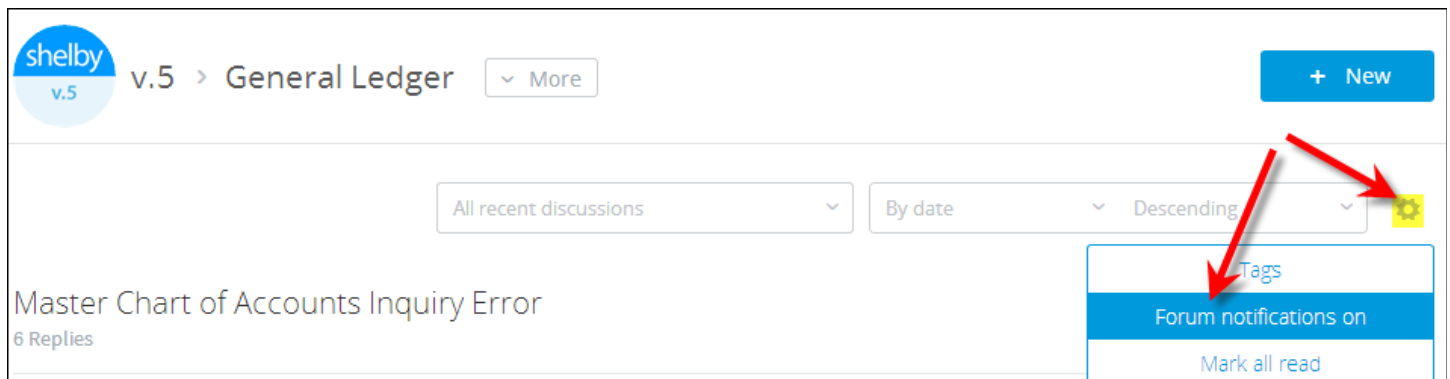
My Subscriptions / Forum Notifications

If you prefer to be notified every time a new discussion is created in a particular forum, you can turn on forum notifications. Click **My Subscriptions** on the main navigation to access the **My Email Subscriptions** screen. All forums you have access to display along with the Group they belong to and whether you subscribe to notifications from that forum. You can use the pull-down menu to filter by group.



Click any **Yes** or **No** in the Subscribe column to change the value. Any changes to subscriptions are automatically saved.

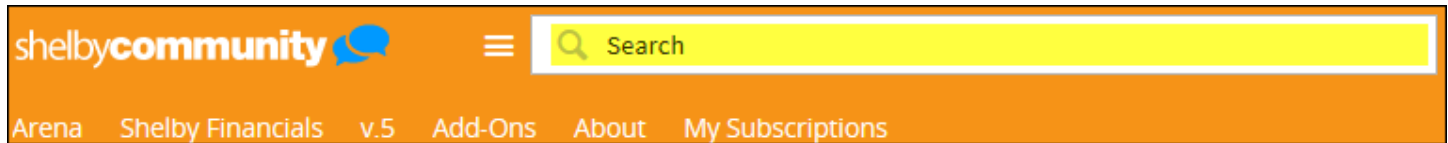
You can also turn on notifications for any forum by navigating to that forum within its parent group. In the below example, we are in the **General Ledger** forum within the **v.5** Group. Click the **Settings** ⚙️ icon and select **Forum notifications** to toggle the notification setting. In the example below, notifications are already on.



You will receive emails whenever there is a new discussion or reply for each of the forums to which you are subscribed.

How do I use the Shelby Community?

Once you have joined the Community, you can log in anytime. Once logged in, you can fully utilize everything the Community has to offer. Click the name of the Group you would like to access in the main navigation area (e.g., **Arena** or **v.5**) or use the search box to search one or all Groups of the Community for the content you are looking for.

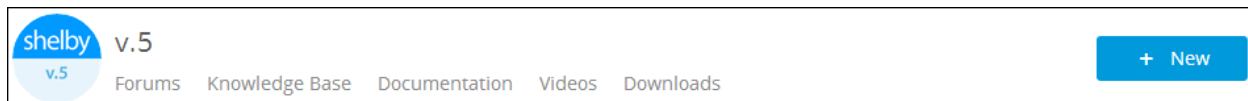


On the home screen you can also view general Community **Announcements**, links to Live Support, and other items of interest.

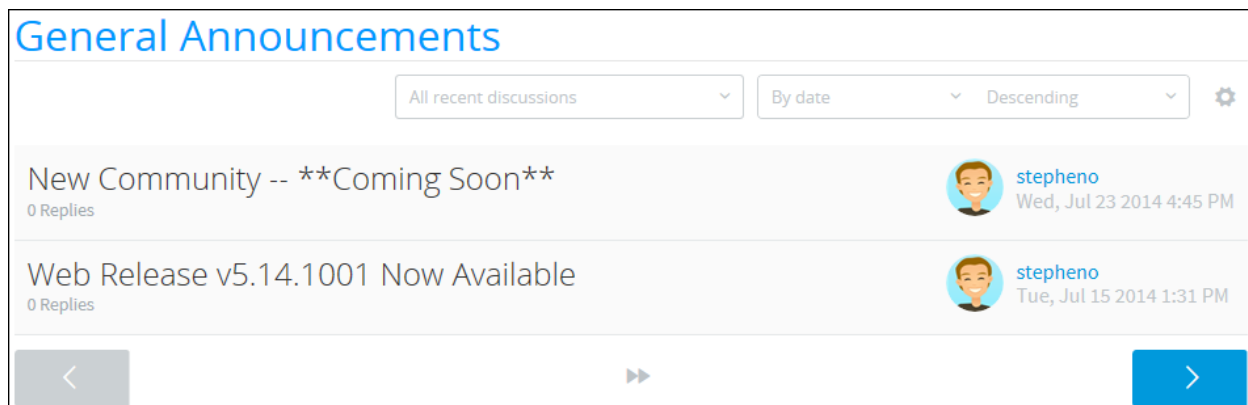
There are three main Groups in the Shelby Community, corresponding to our available platforms: **Arena**, **Shelby Financials**, and **v.5**. The **Add-Ons** group is for add-on software such as Shelby Teller and Shelby Mailroom.

The main Group screen has links to the various areas of interest. For example, the **v.5** group has the following content links: **Forums**, **Knowledge Base**, **Documentation**, **Videos**, and **Downloads**. You can also click the **+New** button to start a discussion in any applicable forum.

Note: The **General Announcements** and **Knowledge Base** forums are read-only.



Beneath the content links are the latest discussions in the **General Announcements** forum. For example, this is where update notifications will display. Click any discussion link to go directly to the content of that posting.

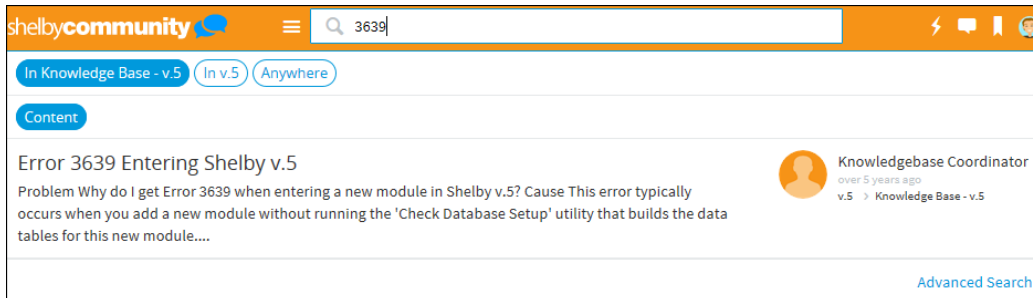


Next on the Group page are other content areas displaying links to Updates/Files, Live Support, [Email digest options](#), etc. The last main content section on the main Group page displays the latest activity within the Group (e.g., latest Forum discussions). Click any discussion to go directly to that content page.

Search

The **Search** function is accessible in all areas of The Shelby Community. How it functions depends on in which area of the Community you are using it.

On the home screen of the Community you can search **Content** (posts and downloads), **Groups**, and **People** (other Community users). Within a Group you can search within that group or 'Anywhere' (the entire Community) for **Content** or **Groups**. Within a Forum you can search within that specific forum, the entire group, or 'Anywhere' for **Content**.



To begin a search, you can start by just typing in a few key words. If you do not find what you are looking for, there are some ways to narrow or focus the results. Typically, when you add a word, the system may find similar words that match. For example typing the word 'email' may find posts related to 'e-mail', 'emailing', 'emailed', etc.

To look for a particular phrase or more exact wording, add quotes around the text, such as "**print contribution statements**", or "**email**". You can also exclude or include certain items within your results by adding a minus sign (-) or plus sign (+) before the text, such as:

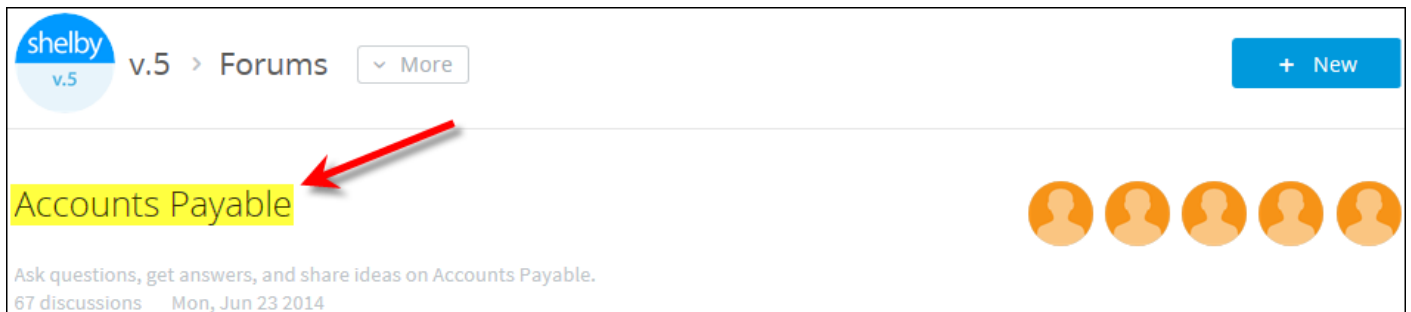
- **Registrations –event** : This would find instances where variations of the word 'registrations' is used, but would omit those where the word 'event' is used.
- **Arena +installer –select** : This would find instances where variations of the words 'arena' and 'installer' are used, but would omit those where the word 'select' is used.
- **"contribution statements" +email** : This would find instances where the phrase 'contribution statements' and the distinct use of the word 'email' are used.

Although you may anticipate getting fewer results when using the plus sign (+) to add words, it could give you more results. When searching, try variations to tweak the output.

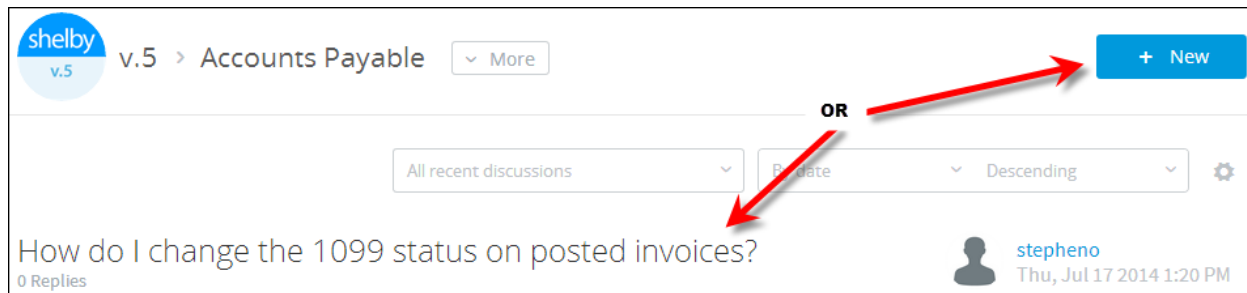
Forums

One of the key reasons to join the Shelby Community is the ability to network with other Shelby Systems users. You can share opinions, ask and answer questions, and communicate with each other. The Forums section of each Group is the heart of the Shelby Community.

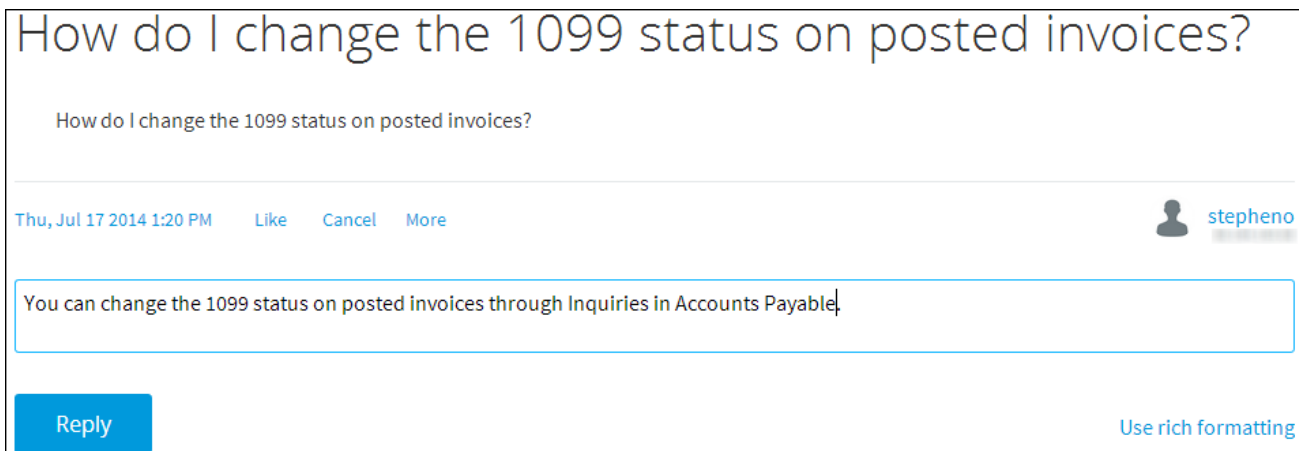
On the **Forums** screen all forums will list in Alphabetical order. Click on a forum link to access the discussions within. You can also click the **+New** button to start a discussion in any applicable forum.



Once inside a Forum, use the [Search](#) feature, browse through the posted discussions and click any discussion link to view the details, or click the **+New** button to start your own.

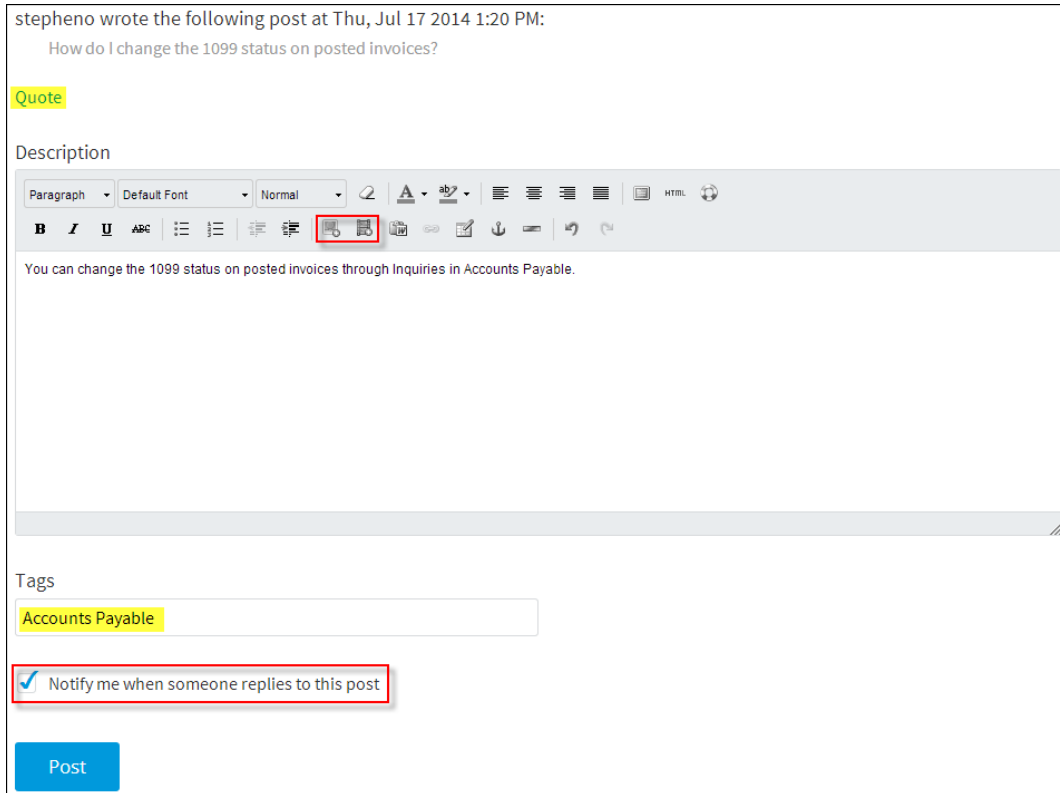


If you are viewing an existing discussion, you can reply using plain text in the field provided. Click the **Reply** button to post your response.





Click the **Use rich formatting** link if you want to bring up a rich text editor window with which to compose your reply. This also gives you the ability to quote earlier replies, subscribe to thread notifications, and add **Tags** to your reply.

Note: Creating a new post uses the **Content editor** option you have selected within [Settings](#).



The screenshot shows a rich text editor interface. At the top, it says "stepheno wrote the following post at Thu, Jul 17 2014 1:20 PM:" followed by the text "How do I change the 1099 status on posted invoices?". Below this is a "Quote" button. The main editing area is titled "Description" and contains a rich text editor toolbar with various icons for text formatting (bold, italic, underline, text color, background color), lists, links, and media. The text in the editor reads "You can change the 1099 status on posted invoices through Inquiries in Accounts Payable." Below the editor is a "Tags" section with a text input field containing "Accounts Payable". There is a checkbox labeled "Notify me when someone replies to this post" which is checked. At the bottom is a blue "Post" button.

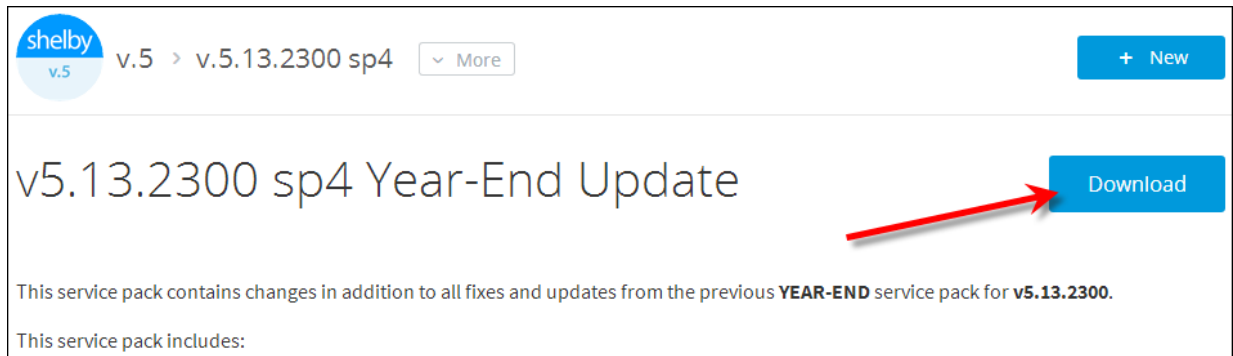
The **Insert/Edit Media** icons include one for **Images**  and one for **Videos** . Click these and you can easily upload or link images or videos in your post. Once added, you can right-click the medium and select to **Insert/Edit** to bring up even more options.

Click the **Post** button when ready to submit your post or reply.

Downloads and Updates/Files

The Downloads section is also known as the Updates/Files section and enables you to download software updates as well as locate queries, drivers, and other files easily for your selected Group.

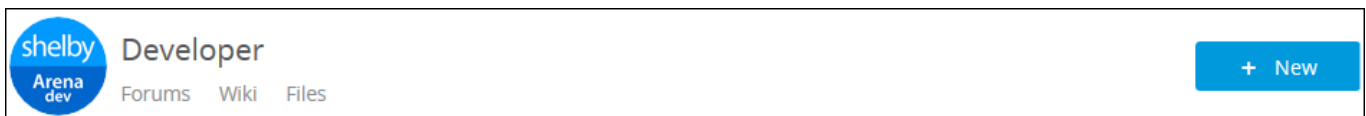
You can browse the list of folders or use the [Search](#) function at the top of the page. Click a folder to display the contents therein. Click any item in the folder to get more information about the download. You can then click the **Download** button to download the file.



There are other sections available in the various groups. We will go over some of the key areas of the different Groups below.

Arena Developer (Arena)

The Arena Developer sub-group is for developer level Shelby Arena clients. It has its own Forums and Files areas. The Arena Developer group is a distinct space for discussion, collaboration, and sharing with other developers. Click the **+New** icon to start a new discussion in a forum or upload a file.



The developer wiki will also be located in this area when it is added to the Shelby Community.

Documentation and Videos

Supplemental documentation and tutorial videos are now available through the **Documentation** and **Videos** sections of each Group.

Knowledge Base Forum (Shelby v.5)

The Shelby v.5 Knowledge Base is available twenty-four hours a day, seven days a week. You can find answers to 'how-to' questions, resolutions for error messages, as well as links to queries and downloads (such as drivers). In addition to the Knowledge Base forum itself, we also have the Year-End Assistance forum. The Year End Assistance forum contains instruction and answers to year-end specific processes and questions. You can reach the **Knowledge Base** by clicking its forum link **or** through the link in the main v.5 Group navigation.

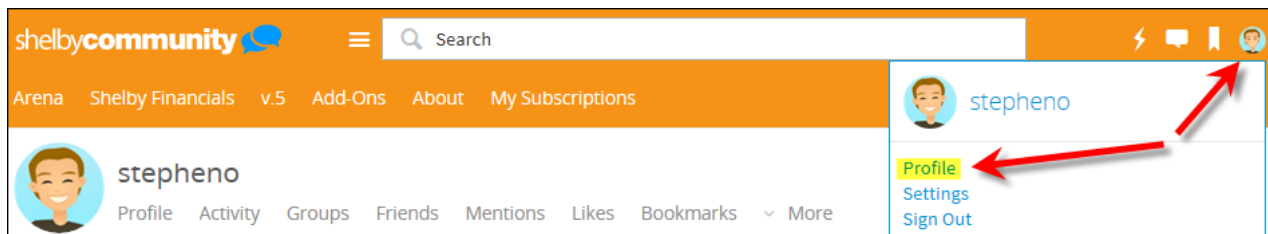
You will see the posts displayed, and can either browse through them or use the [Search](#) option at the top of your screen.

How do I configure my Shelby Community access?

In the Shelby Community you can edit your profile, edit your user account settings, manage your bookmarks, create and reply to private messages, and easily keep up with notifications.

Profile

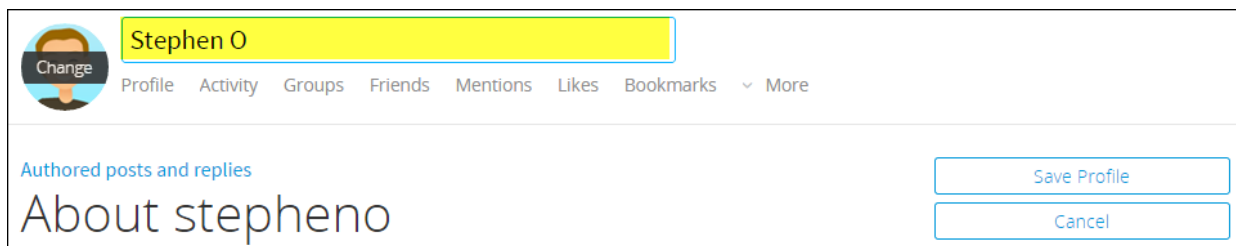
Your profile on the Shelby Community includes the official **Profile** that displays for other users and allows you to keep track of your friends, mentions, likes, and bookmarks on the Shelby Community. To access your profile click the profile icon and then the **Profile** link.



Main Profile

The **Profile** section contains your **About** information, including space for a biography. Click the **Edit Profile** button to start making changes. You can customize your avatar (picture or graphic associated with your profile) by clicking the **Change** text on your current avatar. This will let you select an Avatar or Upload one from your computer.

Note: Images are resized for best viewing.



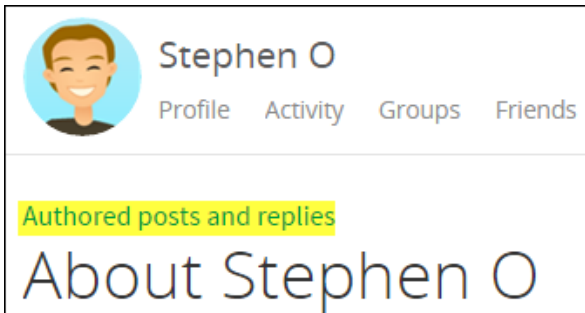
You can edit your **Display Name** using the field to the right of your avatar. This Display Name is used throughout the Community with your posts and other content. If desired, enter a **Biography** in the field provided.

In the **About** area you can specify your **Location**, **Birthday**, and **Gender**. In the **Contact** area you can specify a **Public Email** address that will be viewable by other members of the Shelby Community. You can also choose to share your **Blog**, **Gallery**, **Twitter**, **Facebook**, **AOL IM**, **Yahoo IM**, **Google IM**, and **Windows Live IM**. Your **Customer Number** is also displayed here for reference. If the displayed customer number is not correct, please contact Shelby Support. In the **Interests** area you can specify your **Occupation**, **Hobbies**, and **Education**.

Click the **Save Profile** button to save your changes or the **Cancel** button to return to the main profile screen without saving changes.

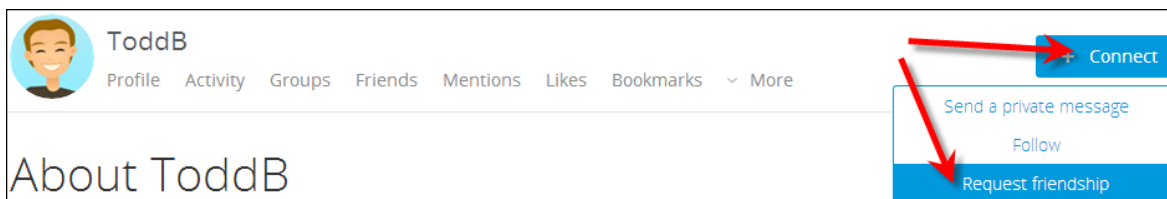
Activity

The **Activity** section displays your recent activity in the Shelby Community. You can see discussions you have liked, replied to, or posted, as well as avatar changes and other activity. All of this is displayed by date. Content older than thirty days expires every five minutes. To see a user's complete forum post and reply history, click the **Authored posts and replies** link on the user's profile.



Friends

The **Friends** section displays Shelby Community users you have added as friends. To request friendship, access a user's profile, click the **+Connect** button, and select **Request Friendship**.



The Friends feature allows you to easily stay connected with other Shelby Community users. You can see what they are discussing, participate in their conversations, and more easily collaborate towards shared goals.

Mentions

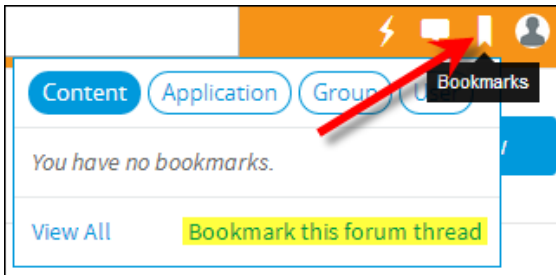
The **Mentions** section displays all the discussions in which you have been mentioned. You can mention another user in a discussion by using the **At @** symbol and then typing that user's name. When you see the user you want to mention, click the user name in the list.

Likes

The **Likes** section displays discussions that you have 'liked' within the forums. Click any discussion link to access the content directly. To indicate that you like a discussion, click the **Like** link at the bottom of the post.



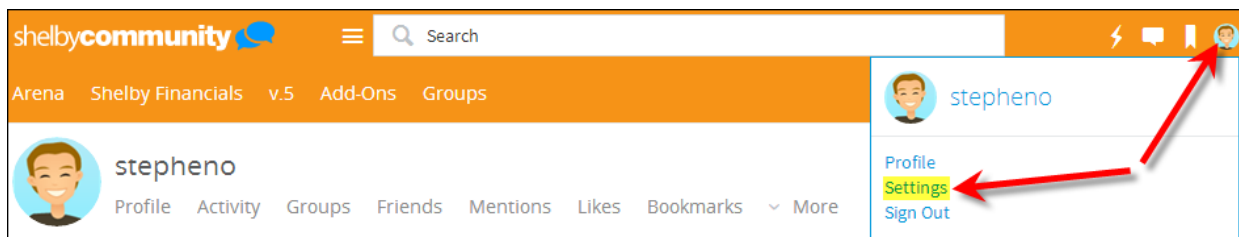
Bookmarks



The **Bookmarks** section displays your bookmarks for **Content**, **Applications**, **Groups**, and **People**. Click any link to access the bookmarked content directly. To create a bookmark, click the **Bookmarks** icon and then click the **Bookmark This...** link (e.g., **Bookmark this forum thread**).

Settings

Settings within the Shelby Community include the ability to configure several options, as well as manage settings for **Email Digests** and **Notifications**. To configure your **Settings** for the Shelby Community click the profile icon and then the **Settings** link.



Options

Specify your private email address in the **Email address** field. This field allows you to change your contact email for the Shelby Community. Notifications that you subscribe to, such as forum subscriptions, will be sent to this email address. Change the email address in this field to whatever you want it to be. This email address is not shared publicly.

Note: Each user in the Shelby Community must have a unique email address (you cannot have the same email address assigned to more than one user).

For the **Content Editor** select either **Enhanced** or **Plain Text**. If desired, customize the **Time zone** and **Date format**. For the **Allow private messages from** option select **No one**, **Friends Only**, or **Everyone**. You can then select your privacy options. You can **Share bookmarks** with other users, **Include in search** (which will allow you to be found via the Shelby Community search tool), and **Display user signatures**.

Share bookmarks
When enabled, other users can see your bookmarks on your profile

Include in search
When enabled, you will be able to be found via search.

Display user signatures
When enabled, user signatures will be shown below users's posts within forums.

The **Signature** field allows you to enter a signature to be shown below all of your posts within forums.

Your **Sign-in name** is displayed for reference purposes. You can click the **Change password** link if you wish to change your Shelby Community password. The **Last sign-in** date is also shown. If you want to save any changes to your options, click the **Save** button.

Email Digests

The **Email Digests** area allows you to manage the email digest notifications to which you are subscribed. You can change the Frequency to **Daily**, **Weekly**, or **Not Subscribed**. Selecting **Not Subscribed** will cause that group to disappear from your Email Digests screen the next time you enter Settings. Click **Save** to save your changes to Email Digests.

Notifications

You can select which ways you want to be notified, and can change these options at any time. Remove the check from the left of the option to turn off notifications for that type or select which way you want to be notified for each type on the right: **Email** and/or **Live Alert**.

The first area is **Activity from subscriptions**. This deals with blog, thread, gallery, and wiki subscriptions.

Activity from subscriptions

Notify me when someone: Select none	Email Select none	Live Alert Select none
<input checked="" type="checkbox"/> Blog posts in blogs to which you are subscribed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Comments on blog posts to which you are subscribed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Replies to a thread I'm subscribed to	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Creates threads in forums to which you are subscribed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Comments on media files to which you are subscribed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> New media in galleries of which you are an owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Comments on wiki pages to which you are subscribed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Updates a wiki page to which you are subscribed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The second area is **Activity from your network**. This deals with other users of the Shelby Community.

Activity from your network

Notify me when someone: Select none	Email Select all	Live Alert Select none
<input checked="" type="checkbox"/> Follows me	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Approves my friendship request	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Requests my friendship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> New group memberships not added by you	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Membership request in groups to which you are an owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Mentions my groups	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Mentions me	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Sends me a private message or replies to my private message	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

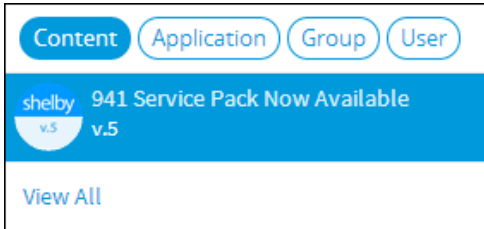
The final area is **Activity related to content you write**. This allows you to control notifications relating to things to which you have posted or replied.

Activity related to content you write

Notify me when someone:	Email	Live Alert
Select none	Select all	Select none
<input checked="" type="checkbox"/> Comments on content that I comment on	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Comments on content I write	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Replies you created awaiting moderation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Replies to my question or discussion (deprecated)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Threads you created awaiting moderation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Replies to a question or discussion I have replied to or suggested an answer to	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Suggests an answer to my question	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Verifies a reply as an answer to my question	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Forums requiring moderation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Likes content I write	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Rates content I write	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click the **Save** button to save changes to your notifications area.

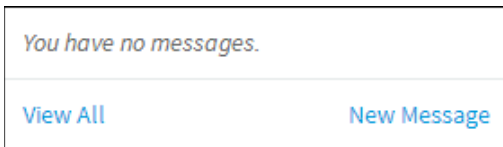
Bookmarks



Click the **Bookmarks** icon to bring up a small window where you can view the most recent bookmarks for **Content**, **Application**, **Group**, and **User**.

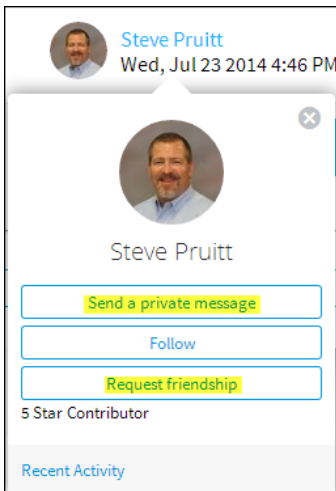
Click the **View All** link to go to the [Bookmarks](#) area of your Profile.

Messages



Click the **Messages** icon to bring up a small window where you can view the most recent private messages sent to you. Click any message to access the detail, **View All** to access your **Inbox**, or the **New Message** link to begin composing a new private message.

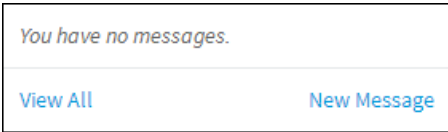
The **Inbox** allows you to keep track of your private messages. You can view or delete existing conversations, reply to conversations, or create new messages. You can also initiate private messages from hovering over a user's name on posted content or from a Profile page.



If you do not see an option to **Send a private message**, you can still click **Request friendship**.

When creating a new message you can specify the **Recipients**, add a **Subject**, and then compose the message itself in the rich text editor. When ready to send click the **Send message** button.

Notifications



Click the **Notifications** icon to bring up a small window where you can view your latest notifications. Click the **Settings** link to go directly to the [Notifications](#) area of Settings.