

# Using ShelbyAddIn

11/07/2007

Shelby Systems has created a new custom control that can be added to your Microsoft Outlook, Word and MapPoint. This new Add-In connects directly to your Shelby database allowing you to select individuals to be used in these Microsoft products. For example, in Outlook you can make a selection via the ShelbyAddIn and add the individuals to a contact list (address book) or simply send an e-mail to the group selected. In Word, the ShelbyAddIn can be used to create a custom mail merge. ShelbyAddIn also allows you to add pushpins for those selected into Microsoft MapPoint. Then you can view your members on a map, create drive routes and more. Follow the instructions below.

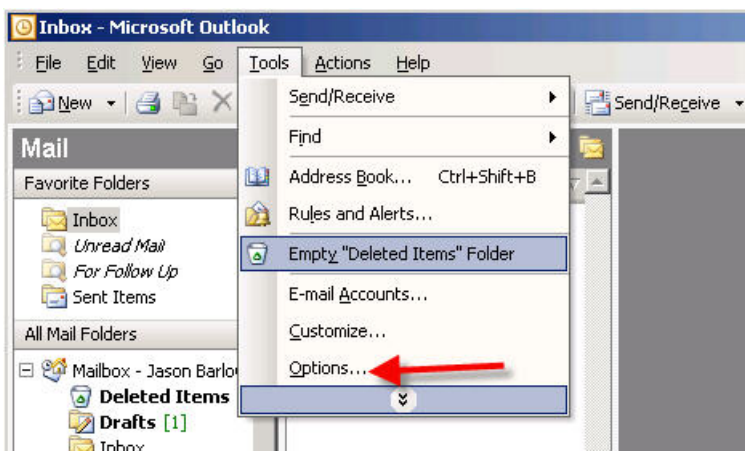
**Minimum Requirements:** ShelbyAddIn requires Microsoft Office 2003 or higher

**This document covers:**

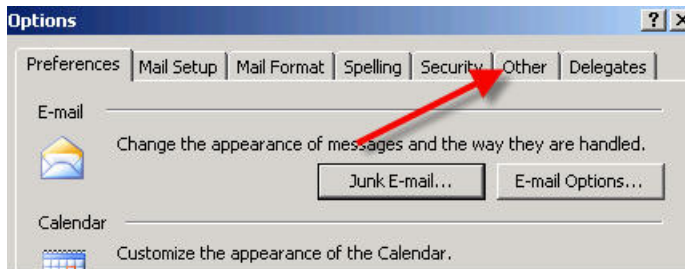
- Add Shelby Contacts Button (Office 2003)
- Add Shelby Contacts Button (Office 2007)
- Import Shelby Contacts Into Microsoft Outlook
- Import Shelby Contacts Into Microsoft Word
- Import Shelby Contacts Into Microsoft MapPoint

## Add Shelby Contacts Button to Microsoft Outlook (Office 2003):

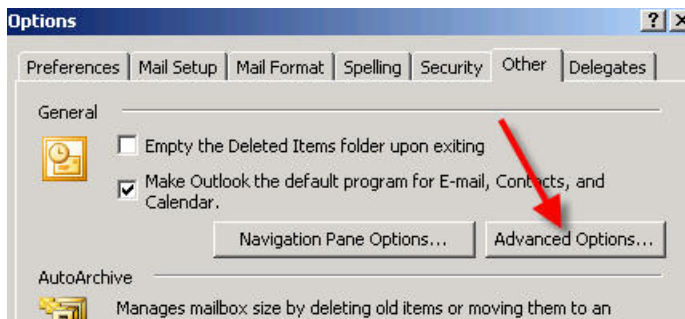
1. From the Microsoft Outlook home screen, click **Tools** from the toolbar.
2. Click **Options** from the drop down menu.



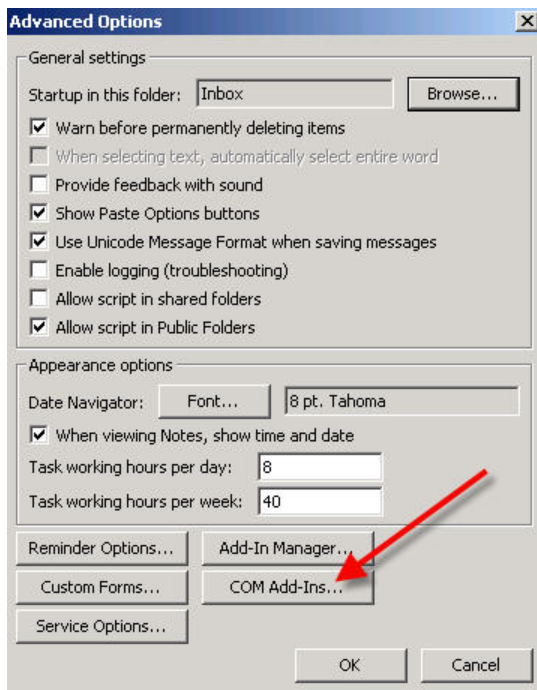
3. Click the **Other** tab.



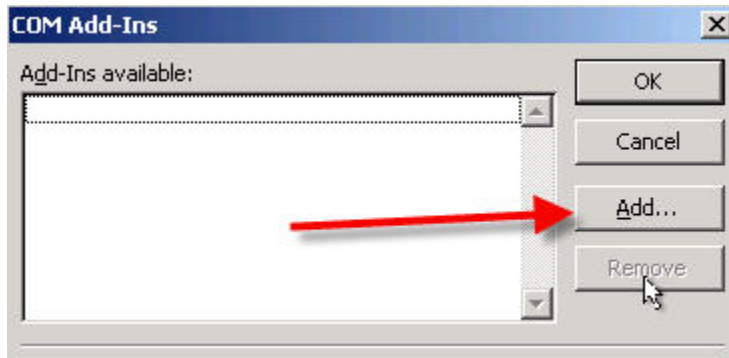
4. From the Other tab, click the **Advanced Options...** button.



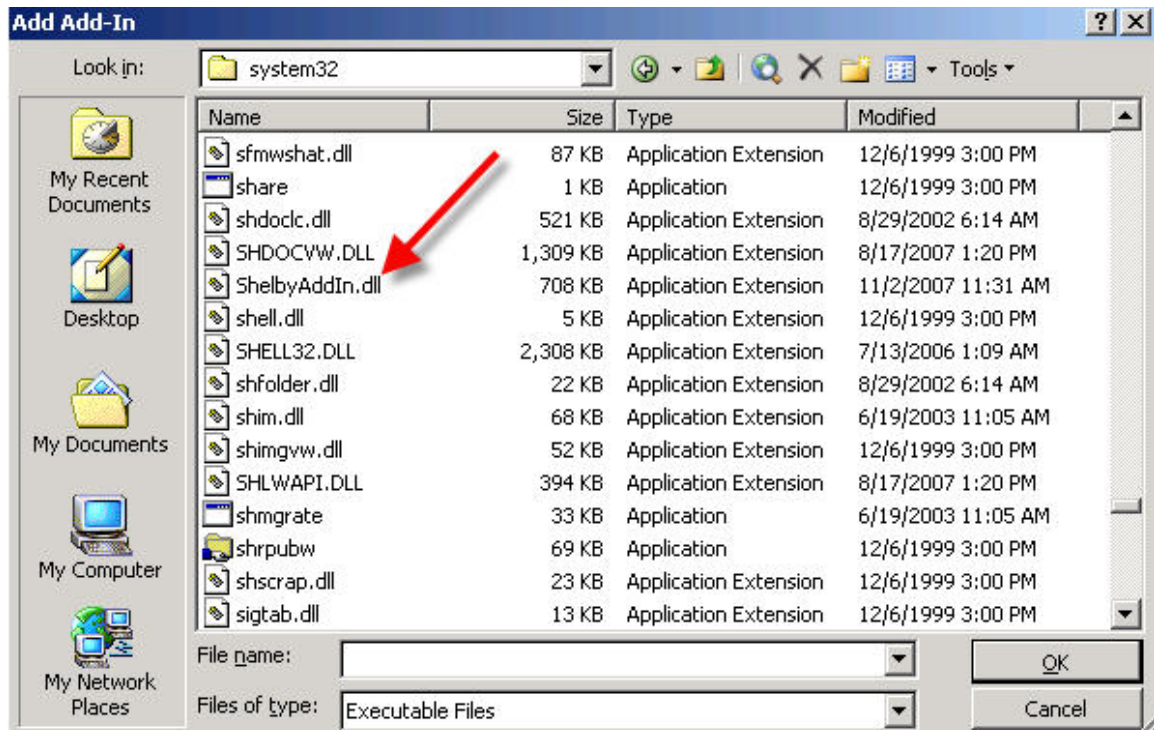
5. From the Advanced Options dialog box, click the **COM Add-Ins...** button.



6. From the COM Add-Ins box, click the **Add...** button.



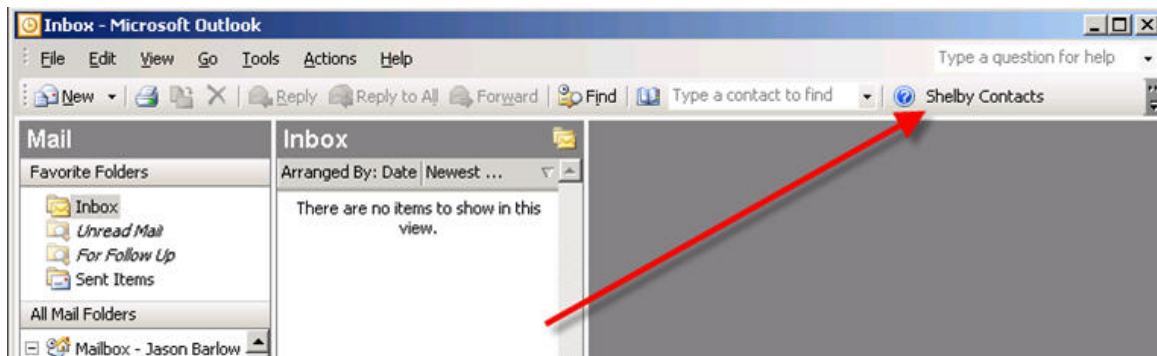
7. From the Add Add-In dialog box, select **ShelbyAddIn.dll** (from the Windows System folder), and then click **OK**.



8. Make sure that the Shelby Contacts AddIn displays in the COM Add-Ins dialog box, and then click **OK**.

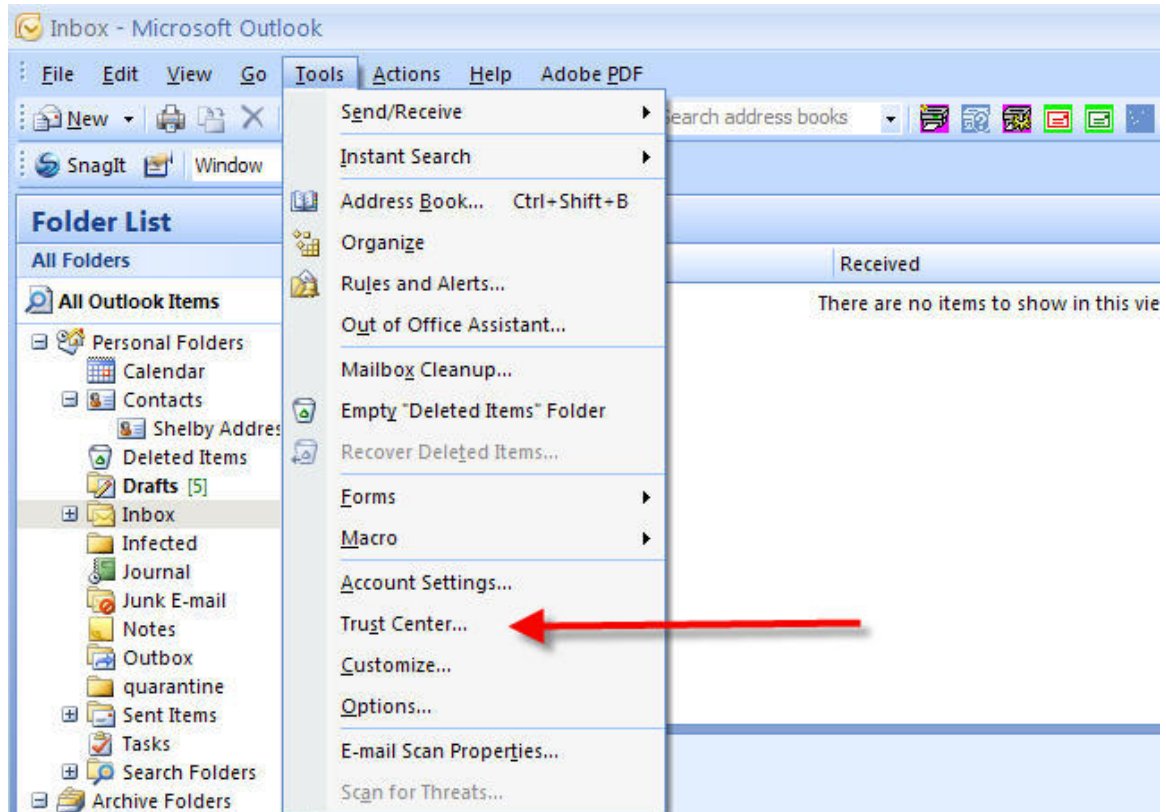


9. Notice that the **Shelby Contacts** button has been added to the Outlook tool bar.

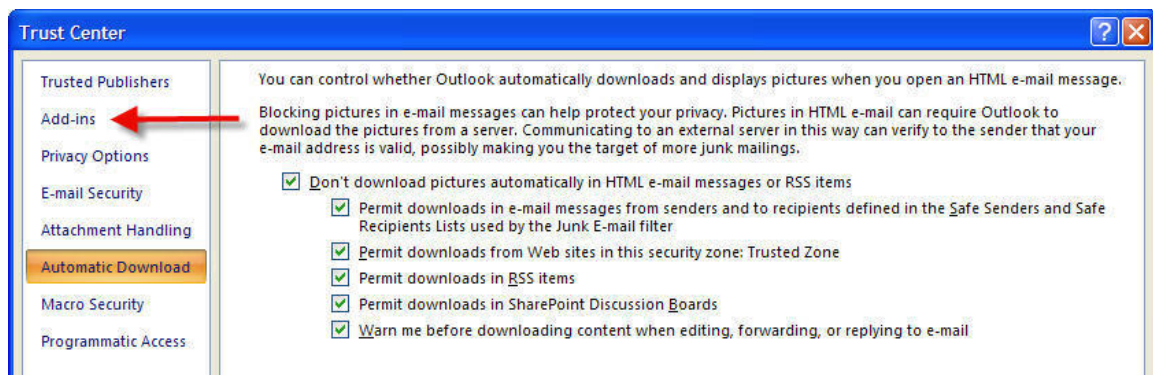


## **Add Shelby Contacts Button to Microsoft Outlook (Office 2007):**

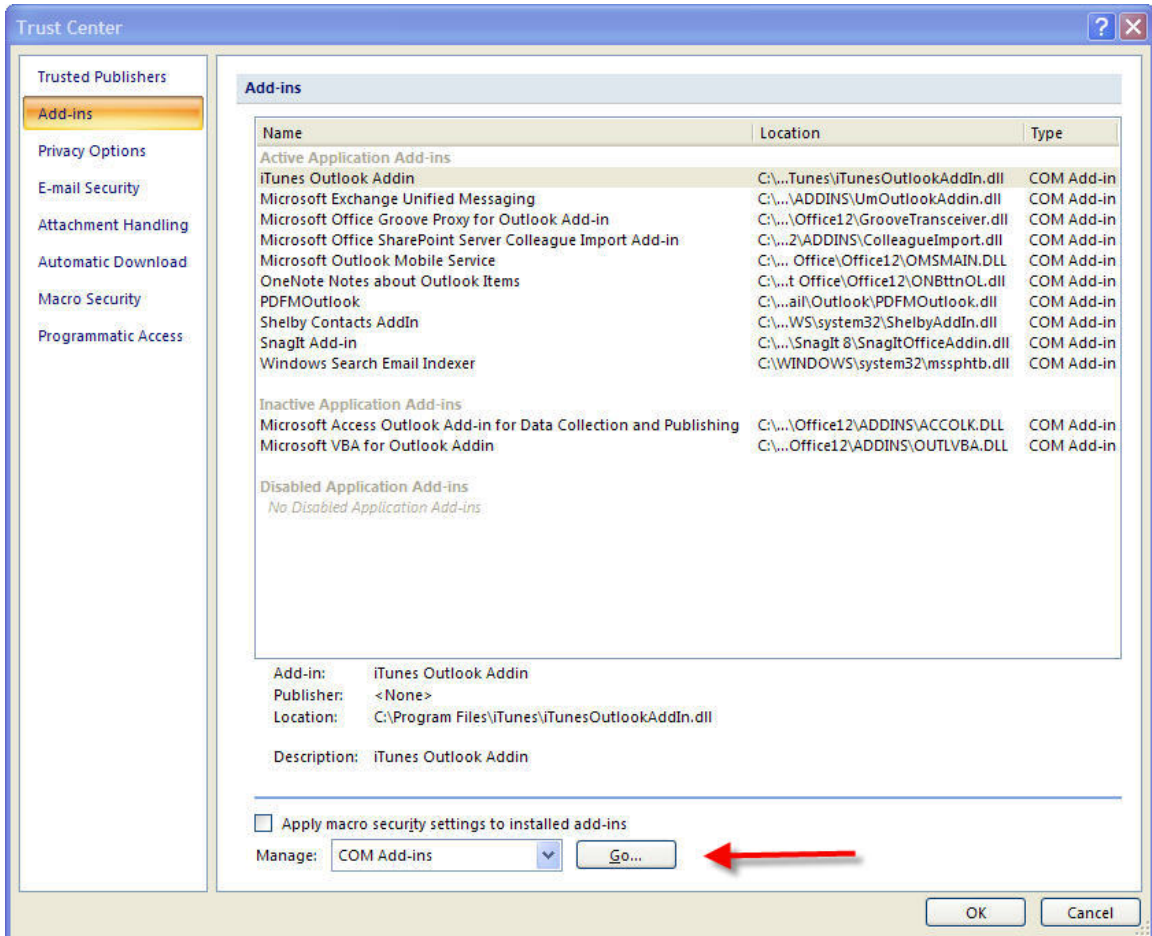
1. From the Microsoft Outlook home screen, click **Tools** from the toolbar.
2. Click **Trust Center...** from the drop down menu.



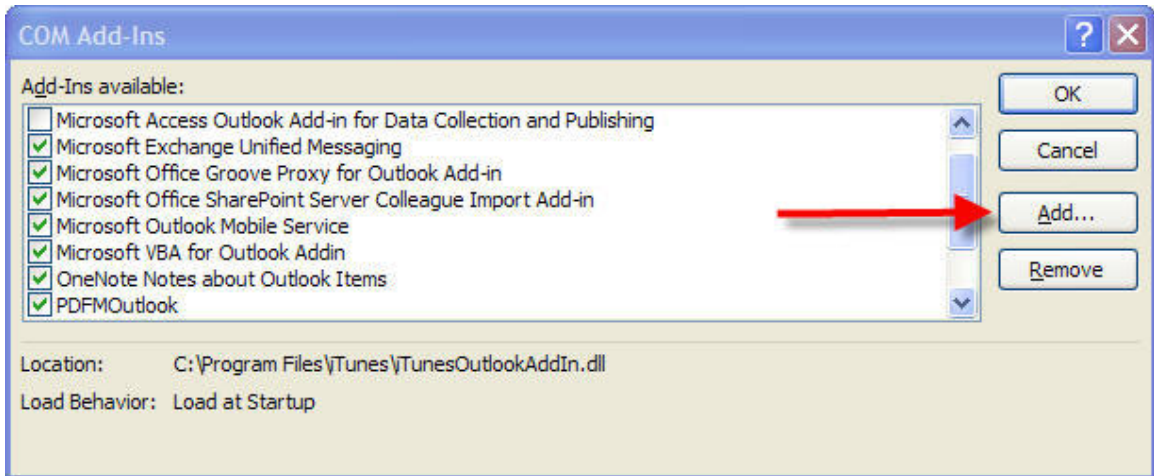
3. Click the **Add-Ins** button on the left hand portion of the Trust Center dialog box.



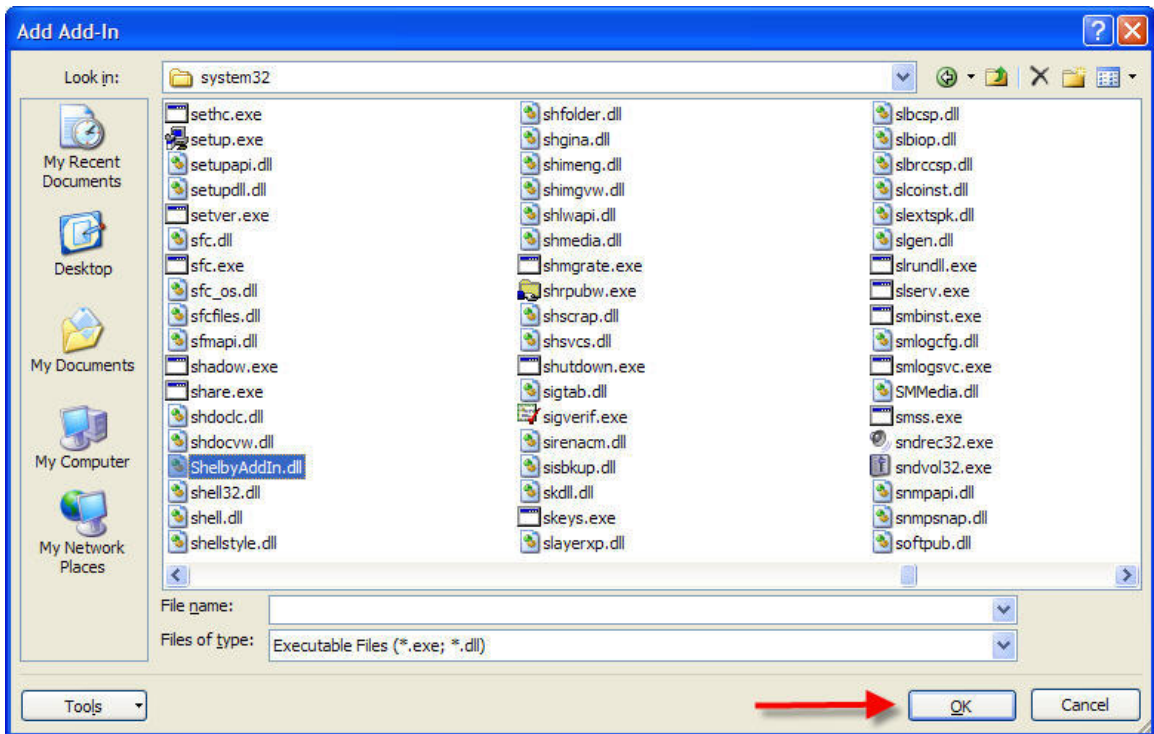
4. Select **COM Add-Ins** from the Manage: drop down list.
5. Click the **Go...** button.



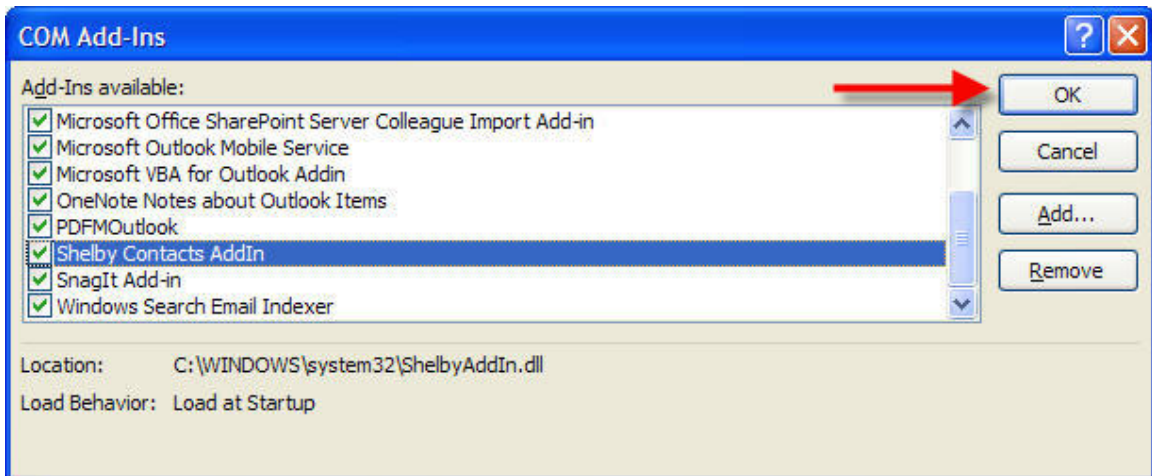
6. From the COM Add-Ins dialog box, click the **Add...** button.



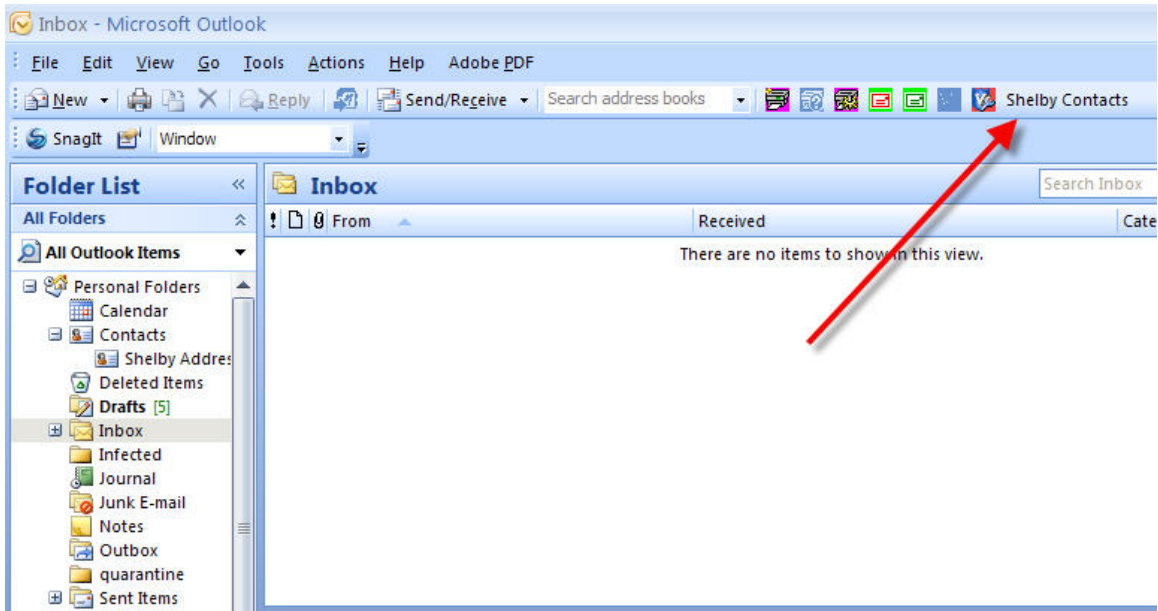
7. From the Add Add-In dialog box, select **ShelbyAddIn.dll** (from the Windows System folder), and then click **OK**.



8. Make sure that the Shelby Contacts AddIn displays in the COM Add-Ins dialog box, and then click **OK**.



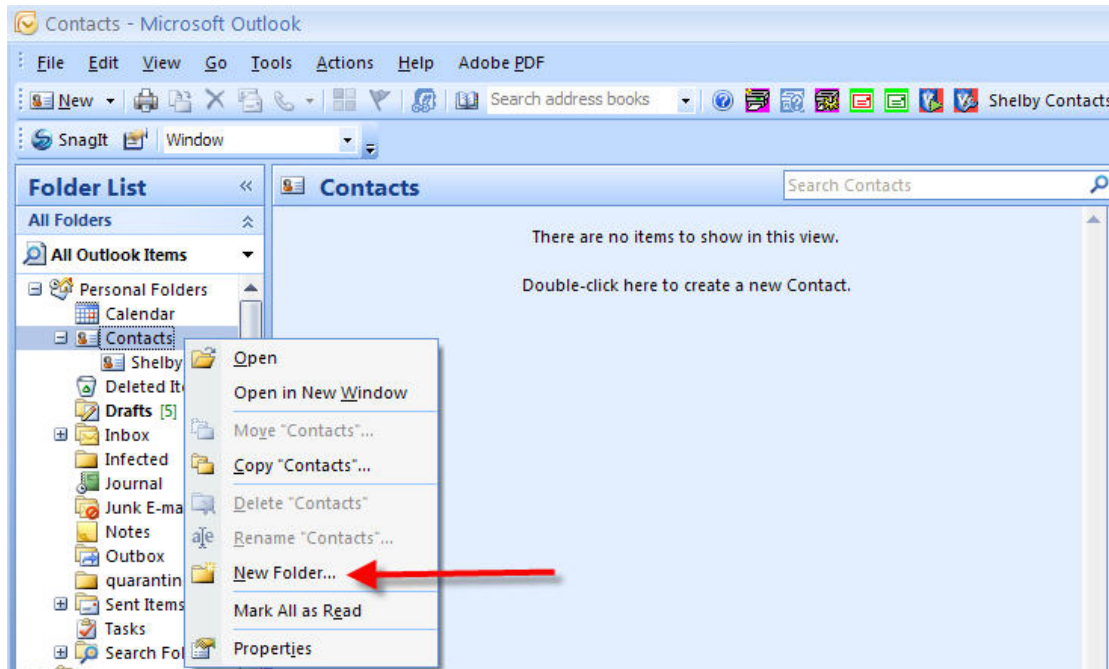
9. Notice that the **Shelby Contacts** button has been added to the Outlook tool bar.



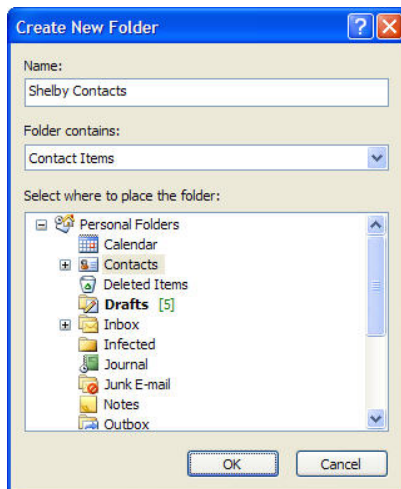


## *Importing Shelby Contacts Into Microsoft Outlook*

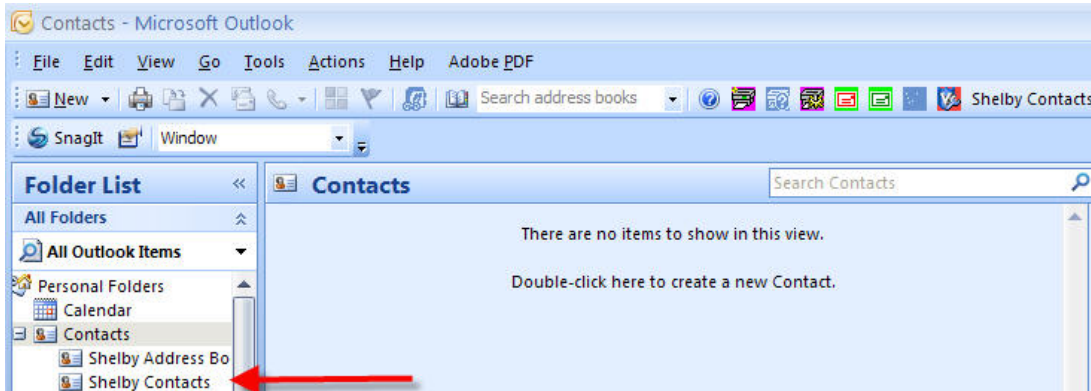
1. Before you import Shelby records into Outlook, you will need to create a Contacts folder to hold the names and e-mail addresses.
2. From the Folder List, right click on the **Contacts** folder.
3. A pop-up window will display.
4. Click the **New Folder...** option.



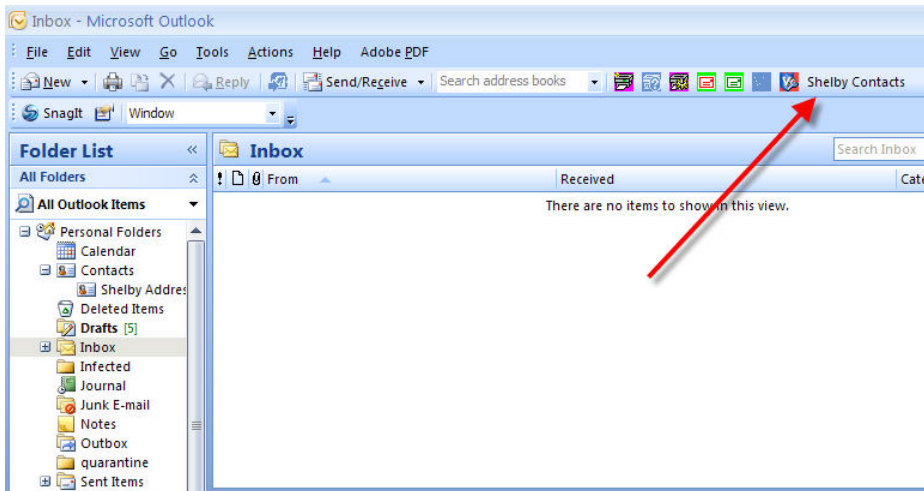
5. Type the name for your new contact folder, and then click **OK**.



6. You will notice that the new folder displays on the Folder List under Contacts.

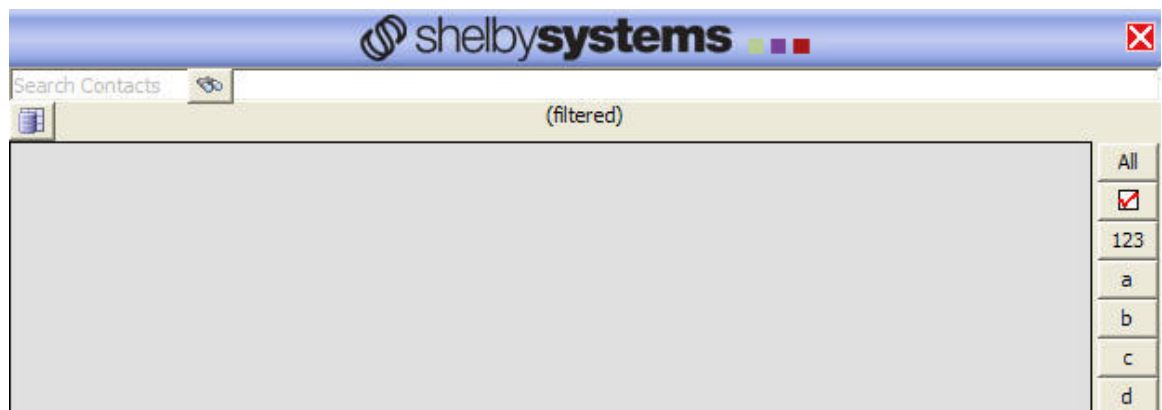


7. Click the **Shelby Contacts** button from the Microsoft Outlook tool bar.

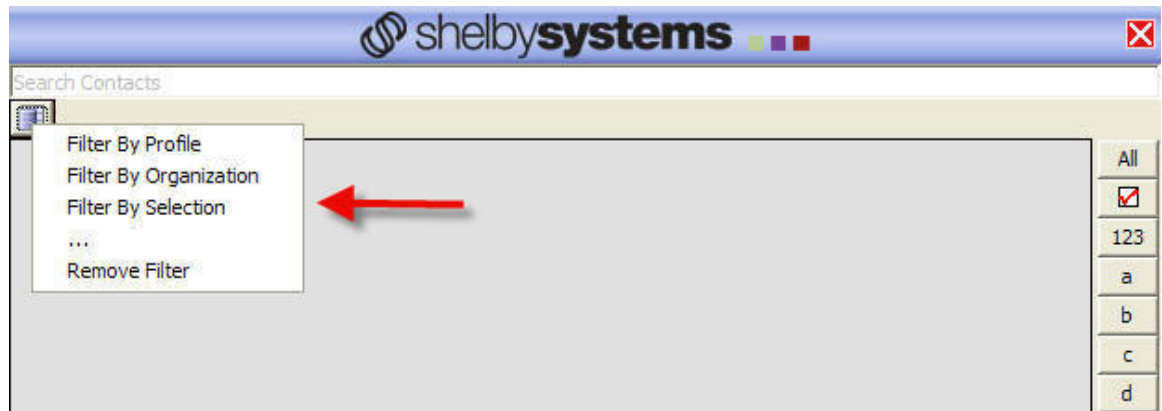


8. Log into the Shelby database with your usual ID and Password if prompted.

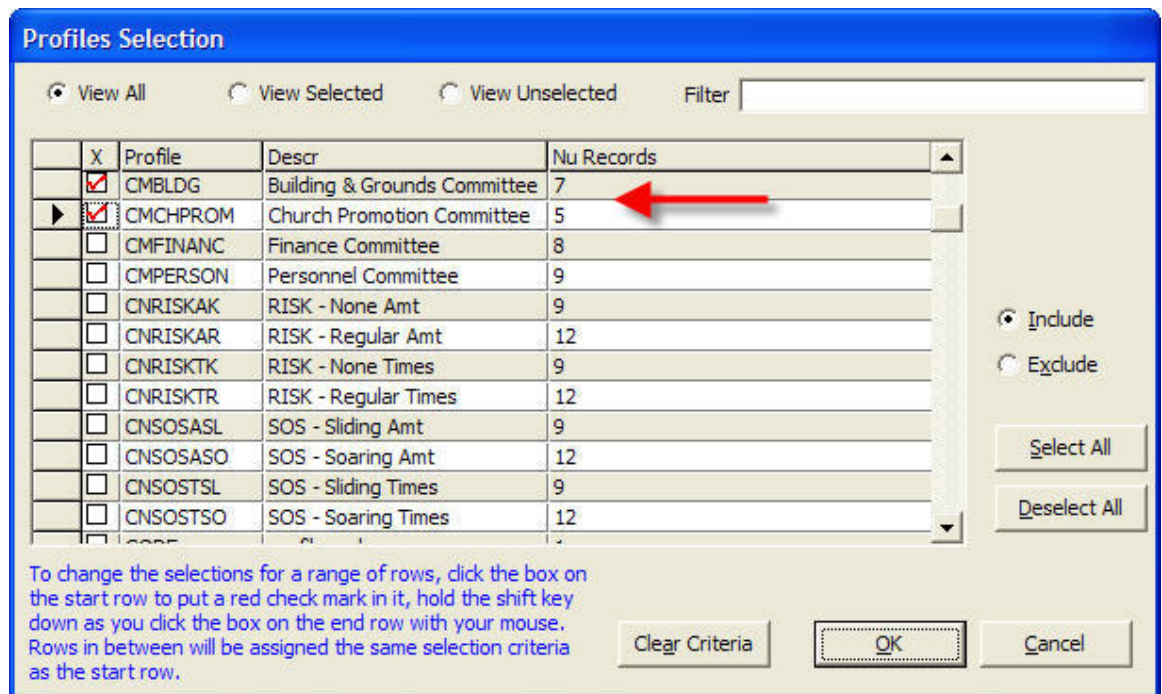
9. The Import dialog box displays.



10. Click the Filter icon to filter the selection by Profile, Organization, Selection or Remove Filter.



11. If you choose to **Filter By Profile**, you will be prompted to mark the profile codes by which you wish to select individuals.
12. After you have made your selection(s), click **OK**.



13. The records that contain the profile code(s) you chose will display in the grid and have been selected (see the mark in the bottom left corner).

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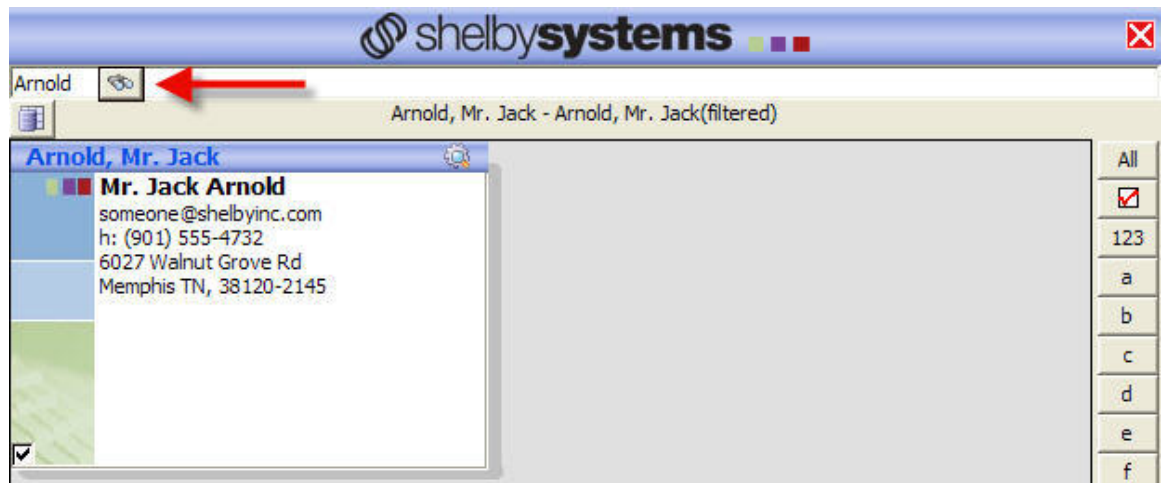
Search Contacts

Arnold, Mr. Jack - Zamora, Mr. Thomas -Tom(filtered)

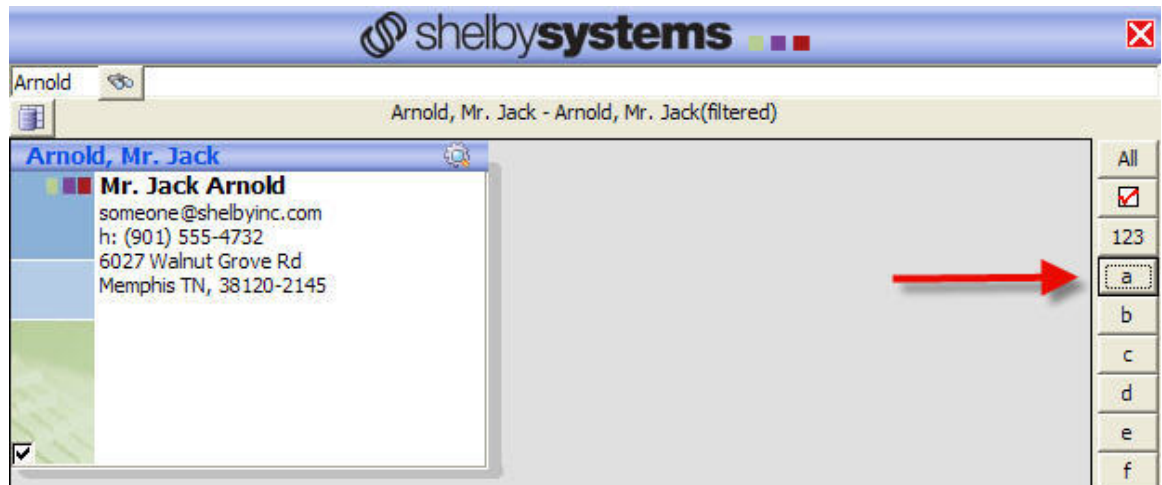
Name	Email	Phone Numbers	Address	Selected
<b>Arnold, Mr. Jack</b> Mr. Jack Arnold	someone@shelbyinc.com	h: (901) 555-4732	6027 Walnut Grove Rd Memphis TN, 38120-2145	<input checked="" type="checkbox"/>
<b>Belzer, Mr. Michael -Mike</b> Mr. Michael Belzer -Mike	someone@shelbyinc.com	h: 521-7223 w: 751-2446 123 c: 235-1234	2860 Bartlett Rd Memphis TN, 38134-4566	<input checked="" type="checkbox"/>
<b>Cleaver, Mr. Ward</b> Mr. Ward Cleaver	someone@shelbyinc.com	h: (901) 555-9812	6726 Whitten Pl Memphis TN, 38133-6012	<input checked="" type="checkbox"/>
<b>Moorey, Ellen</b> Ellen Moorey	someone@shelbyinc.com	h: 555-1212	123 main Cordova TN, 38016	<input checked="" type="checkbox"/>
<b>Normal, Mr. Jack</b> Mr. Jack Normal	someone@shelbyinc.com	h: (901) 555-5678 w: (901) 555-9512	1567 Bartlett Rd Memphis TN, 38134-7106	<input checked="" type="checkbox"/>
<b>Smith Jr., Mr. Robert</b> Mr. Robert Smith Jr.	someone@shelbyinc.com	h: (901) 555-4680	2455 Millbrook Ave Memphis TN, 38127-5844	<input checked="" type="checkbox"/>

Navigation: All, 123, a, b, c, d, e, f, g, h, i, j, k, l, m, n, o, p, q, r, s, t, u

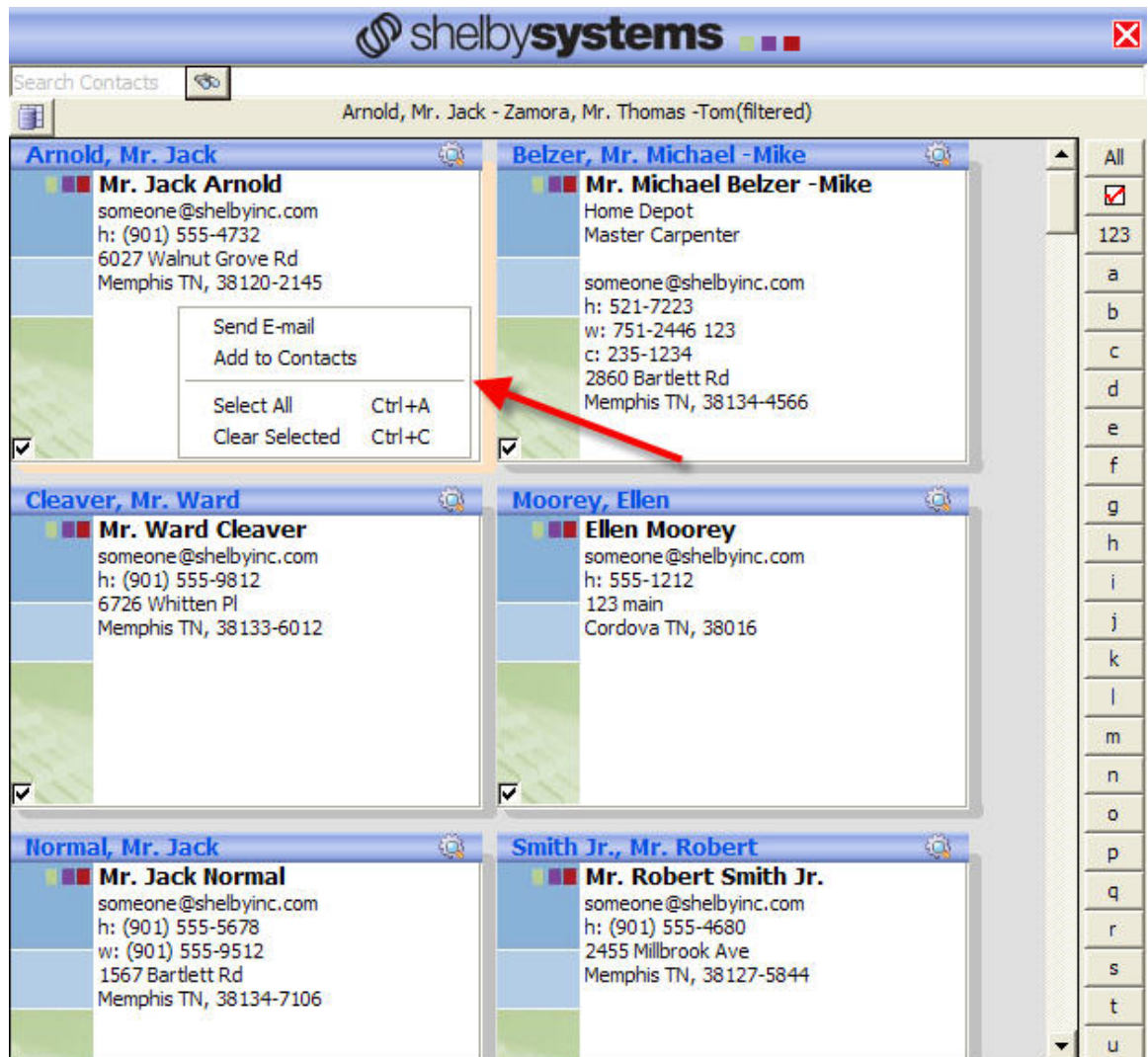
14. You can further filter your selection by clicking in the Search Contacts field and typing characters or numbers, and then click on the search icon.
15. The names that meet the criteria display in the grid below (notice that the program is searching for the characters entered in any part of the record – not just the name field).



16. Notice that you can also limit the records that display on the grid by clicking on the buttons on the right hand side of the screen.

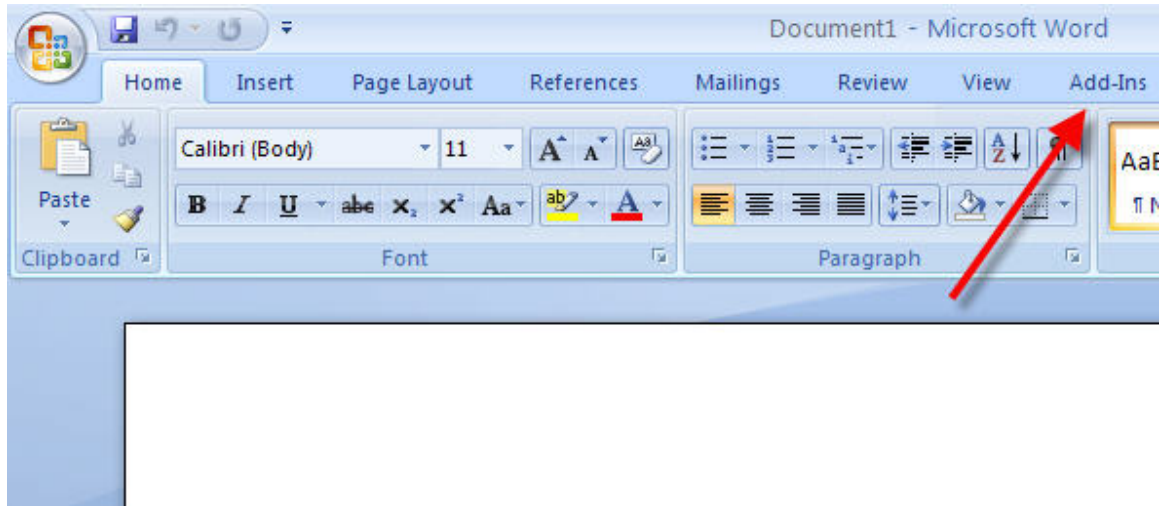


17. Right-click inside any of the records and a pop-up window will display.
18. Click **Select All** to put a check mark on all of the visible records.
19. Click **Clear Selected** to remove the check mark from all visible records.
20. Click **Send E-mail** to add the email addresses selected in an outgoing e-mail.
21. Click **Add to Contacts** to add the names selected to the current folder that is highlighted in Microsoft Outlook.

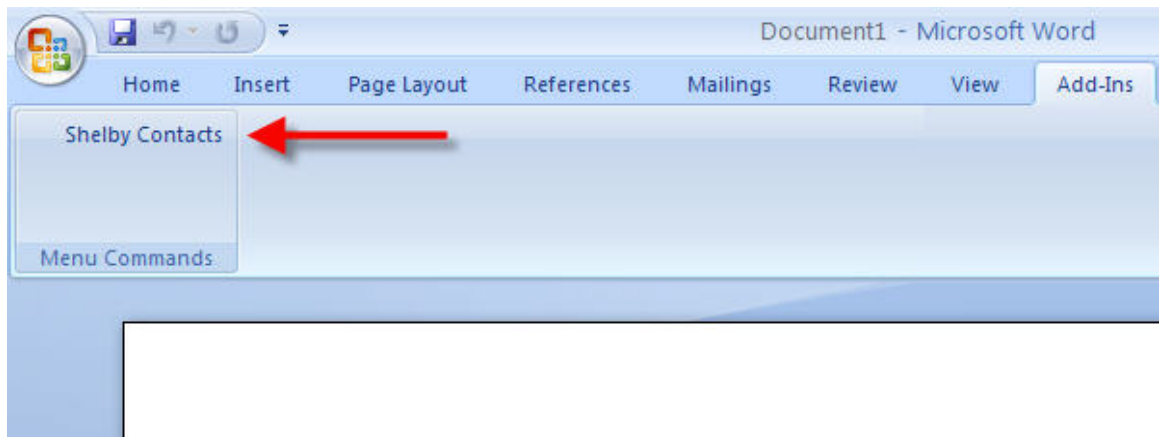


## *Importing Shelby Contacts Into Microsoft Word*

1. Once you have added the Shelby Contacts button to Microsoft Outlook, you will notice that it is automatically added to Microsoft Word.
2. Start the Word program, and then click the **Add-Ins** tab.

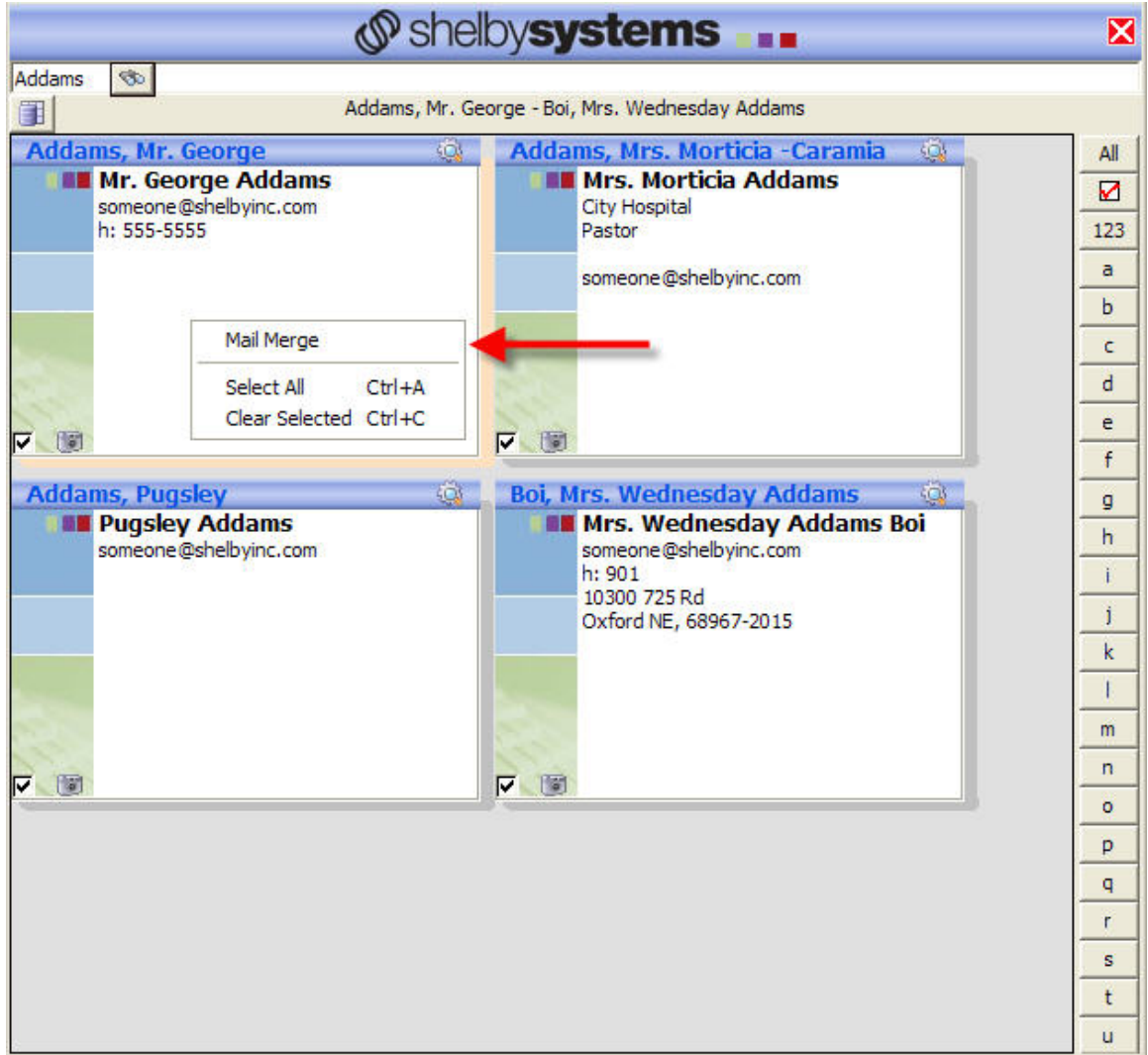


3. Click the **Shelby Contacts** button.



4. The Import dialog box displays.
5. It works in the same way as it does in Outlook (see instructions above).

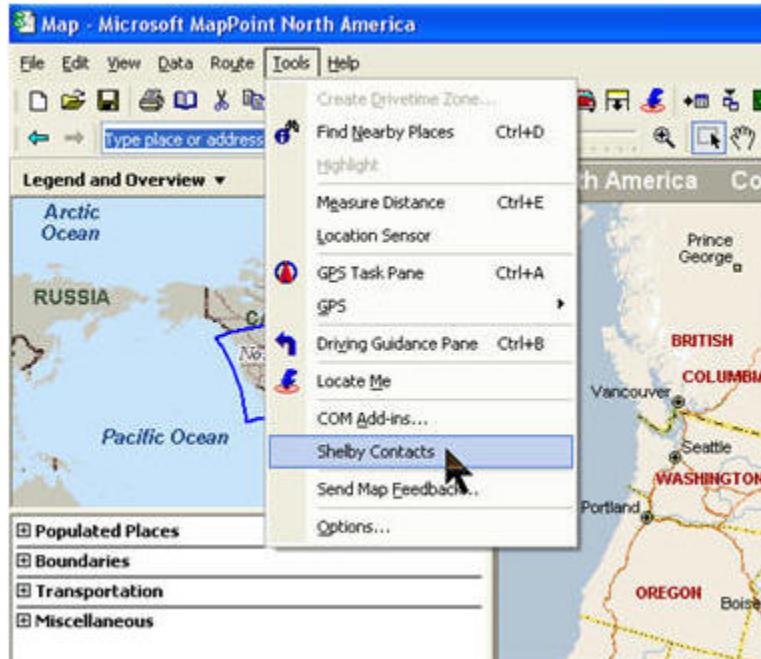
6. Right-click inside any of the records and a pop-up window will display.
7. Click the **Mail Merge** option to merge the document with the names selected.



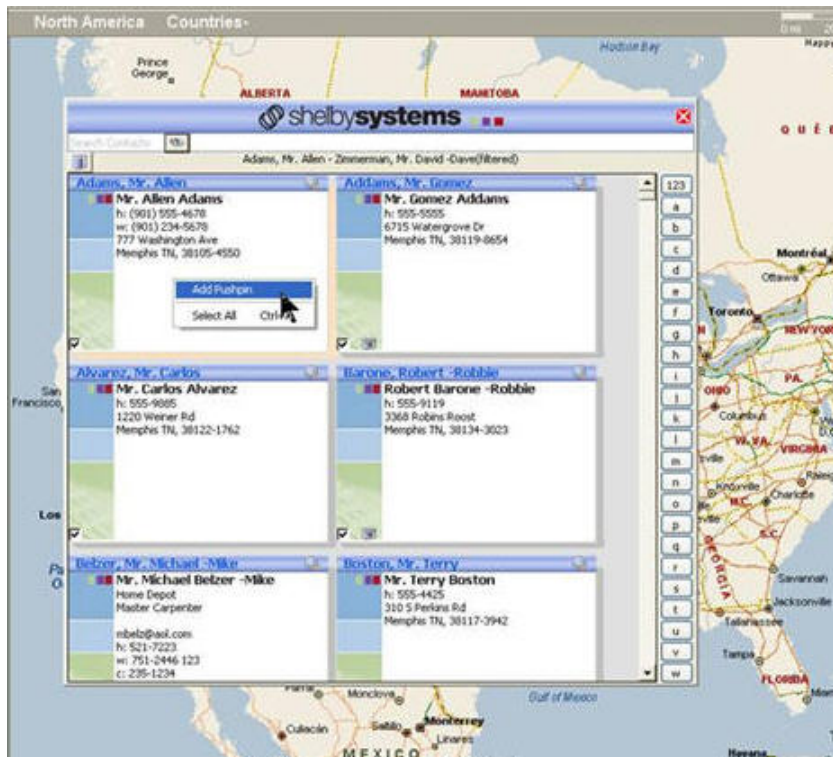


## *Importing Shelby Contacts Into Microsoft MapPoint*

1. Once you have added the Shelby Contacts button to Microsoft Outlook, you will notice that it is automatically added to Microsoft MapPoint.
2. Start the Microsoft MapPoint Program.
3. Click Tools from the tool bar.
4. Click Shelby Contacts from the drop down list.



5. The Import dialog box displays.
6. It works in the same way as it does in Outlook (see instructions above).
7. Right-click inside any of the records and a pop-up window will display.
8. Click the **Add Pushpin** option to merge the mapping program with the names selected.



9. After creating push-pins for your members, you can then use MapPoint's more advanced features.

