The background features a blurred image of a laptop on the left and a stack of several books on the right, all in shades of light blue and white. The text is overlaid on this background.

SHELBYSYSTEMS®

Advance Your Knowledge

Webinar Series

Using Workflows to Track Activity and Involvement

Welcome

Please take a moment to locate the Zoom Webinar controls.
Feel free to say hello or ask a question using the Q & A feature.

Welcome – Introducing our Panelists

Mark Crain

ShelbyNext Trainer



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ShelbyNext Trainer



What are Workflows

Workflows can help:

- get rid of repetitive work
- clean up old records
- track patterns of Giving
- monitor signs of need for benevolence
- track attendance for online church services

What they aren't

Workflows are not:

- going to completely automate all your new member workflow
- needed for online giving batching to Membership
- going prefill fields or preselect group memberships based on new or existing membership (check out Advanced Search and Query)
- a process flowchart builder for new member onboarding

Triggers

There are 8 triggers that alert a workflow to run.

Giving

- Amount
- New Regular Giver
- No Longer Giving
- Pledge Creation

Group

- Add/Remove
- Membership Duration

Miscellaneous

- Attendance
- Form Submission
- Date Fields

Trigger Timeframes

Triggers and actions typically run around **every 15 minutes**, so be aware that triggers and actions do not occur instantaneously. However, ChMS monitors your account so that triggers and actions are executed correctly and in a timely fashion.

- **Attendance triggers** → will run **once a week** if they are set for **more than 6 days**. Attendance workflows that are set for **6 days or less run daily**. The time they run/fire is based on when the workflow was created. You can 'reset' the clock on this by manually running the trigger which will update the timestamp and the workflow will continue to run based on that date until it is manually run again.

Example: If you create a workflow on Monday at 10:00 am for attendance (trigger) that adds a person to a group (action), then the following Monday about 10:00 am, the attendance trigger will run and put any members with that attendance into the group.

- **Added to a Group** → about 15 minutes. The **Add to Group** workflow triggers once per day.
- **Form Submission** → continuous
- **Giving and Pledge Creation** → continuous
- **Membership Duration** → continuous

Actions

There 9 actions that can be used to provide a reaction to the triggers.

Mass Contacts

- Email
- SMS (text)*

Groups

- Group (Add/Remove)
- Present in Group

Miscellaneous

- Interaction
- Admin Message
- Update Progress
- Constant Contact*
- Mailchimp*

*(only if
integrated/activated)

Forms Submission



VBS 2021

We welcome our children back to church with the return of Vacation Bible School, running July 13-15. This form is for both attendee and volunteer signups. In order to maintain smaller groups, we will be holding 2 sessions each day: 9am-11am and 1pm-3pm. Please select the appropriate time slot for you.

SIGN-UP TYPE *required*

Volunteer

Attendee

Forms Submission Workflow

Form Submission
The 2021 VBS Registration Form is submitted.

When the following form is submitted
2021 VBS Registration

Map
Volunteer's Name to Full Name
Email to Email
Phone Number to Cell Phone

Map More Fields
And match Individuals based on
Name

Group

Add the person to
These Groups...

And/Or a group that matches exactly the value selected in this form field:
Sign-Up Type

Sign-Up Type
Volunteer's Name
Email
Phone Number
Would you like to donate the cost of your background check?

Form Submission
The 2021 VBS Registration Form is submitted.

When the following form is submitted
2021 VBS Registration

Map
Volunteer's Name to Full Name
Email to Email
Phone Number to Cell Phone

Map More Fields
And match Individuals based on
Name

Group

Interaction

Assign a
Email

To the following people
Search...

Mark

With the following instructions
Conduct background check if 18 months elapsed.
 Include a link to the submitted form response

New Records and Visitor/Guest Follow up

Name

Active

Description

1. Assign Interaction to Group leader to follow up with visitor.
 2. Text visitor with a follow up message.

Last Ran: Today - 5:34 PM



Group — Add/Remove

Individual is **added** to **1st Time Visitor**

Match a Individual who is

Added to ▾

1st Time Visitor ✕

 Interaction >

 SMS >

SMS

The person

The person's parent

The person's spouse

The group leader

And the following

Numbers

Separate numbers with commas.

With the following message

Pastor Greg here! @NAME, We are happy to see you attended our New

Use @NAME as a placeholder for the person's name who triggered this action.

+ Add Action

Done

Clean Up Records

Trigger 1

The screenshot displays the configuration for a trigger named "Visitor Record Clean Up". The trigger is active and has two triggers defined: "1st Trigger - Follow up on Record" and "2nd Trigger - Add Record to Potential Delete Group". The trigger is configured to match individuals who have been in a "1st Time Visitor" group for "8 weeks". The trigger is assigned to "Follow-Up" and is to be performed by "The group leader". The instructions for the trigger are: "Please review this visitors record to see if there has been activity since their original visit." The interface includes a "Save" button at the bottom left and a "Done" button at the bottom right.

Name
Visitor Record Clean Up

Active

Description
1st Trigger - Follow up on Record
2nd Trigger - Add Record to Potential Delete Group

Group — Membership Duration
Individual has been in **1st Time Visitor** for **8 weeks**

Match a Individual who has been in
1st Time Visitor x

For
8 weeks

Assign a
Follow-Up

To
 The group leader

And the following people
Search...

With the following instructions
Please review this visitors record to see if there has been activity since their original visit.

+ Add Action

Done

Save

Clean Up Records

Name
Visitor Record Clean Up

Active

Description
1st Trigger - Follow up on Record
2nd Trigger - Add Record to Potential Delete Group

Group
Group — Membership Duration
Individual has been in **1st Time Visitor** for **30 weeks**

Match a Individual who has been in
1st Time Visitor x

For
30 weeks

+ Add Action

Done

Save

Trigger 2

By Date Field

[List](#) [Add](#) [Log](#)

Name

Active

♥ Giving — Amount
♥ Giving — New Regular Giver
♥ Giving — No Longer Giving
♥ Pledge Creation
👤 Member — Date Field
👥 Group — Add/Remove
👥 Group — Membership Duration

By Date Field

From/in the following Groups

- At least one group is required
- Allow multi-select

Choose event

- Default is Birthday
- Date fields include: Birthday, Died Date, Baptism Date, Last Attended, Last Activity, Last Contributed, all configurable fields, "Last Background Check"

Treat this as an anniversary?

- Options are yes or no
- Behaves just like it does in Glance. So that birthdays, Wedding anniversaries, etc trigger year after year.
- Default yes

When the event is + input

- This is where to input the # of days/weeks/months/years.
- Req Field, default 0 == today

Timeframe selection

- Options are Days, Weeks, Months, Years
- Default is Days

Forward/backward selection

- Options Are In the past / In the future
- Default is in the past

Member — Date Field

A member of ____ who's Birthday is days In the future

Match a Individual who has been in

These Groups...

Choose Event

Birthday

Treat this event as an anniversary

No

When the event is (use 0 for "today")

number

Days

In the future

Attendance

The screenshot shows the 'Attendance' configuration screen in the SHELBYSYSTEMS application. The interface is divided into three main sections: a left sidebar, a central configuration area, and a right action area.

Left Sidebar: Contains a checkmark icon, three dots, and a plus sign. The plus sign is associated with the text 'From/in the following Groups' at the bottom of the sidebar.

Central Configuration Area:

- Title:** Attendance
- Description:** A member of one of these groups (Check In/Children GRADE5 Grade Five Room 45, Check In/Children GRADE6 Grade Six Room 48, Sunday School YHJRHGH 7th Grade Class, or Sunday School YHJRHGH 8th Grade Class) is marked **unexcused** 3 times in the last 3 weeks.
- Match a Individual who is:** A dropdown menu currently set to 'Unexcused'.
- Count:** A text input field containing the number '3'.
- Time(s) in the past:** A dropdown menu currently set to '3 weeks'.
- Bottom Bar:** A green bar with a plus sign and the text '+ Add Action'.

Right Action Area:

- Update Progress:** A button with a pie chart icon and a right-pointing arrow.
- Interaction:** A button with a speech bubble icon and a right-pointing arrow.
- Description:** It will ensure the trigger isn't triggered again for the triggering person. A trash icon is visible to the right of this text.
- Bottom Bar:** A blue bar with the text 'Done'.

Small Group Sign up



Find A Group

Adults Any Campus

Any Life Groups

Any Meeting Time

Join A Group Hide Map

4 Groups Filters

Search groups

9th Grade Small Group
 Leader: Jesse Happel
 Thursdays at 7:00 AM
 Huntsville, AL (158.7 mi from Passage Community Church...)
 8 Members

Men's Bible Study
 Leaders: Desi Arnaz, Abraham Lincoln
 Sundays at 10:00 AM
 Huntsville, AL (159.7 mi from Passage Community Church...)
 6 Members

Details

Leader(s): Mark Fisher, Mark Fisher
Day: Sunday
Time:
Age Groups: Adults
Life Groups: Adult, Men's, Women's, Young Adult
Type: Class

Leader(s): Linda Sample
 Linda Johnson
Day: Thursday
Time: 6:00 PM
Age Groups: Adults, Young Adults
Life Groups: Adult, Women's, Young Adult, Youth

Day: Monday
Time:
Age Groups: Adults, Young Adults
Life Groups: Adult

Church by MinistryOne

Let's say we have a congregant use the Group Finder to sign up of a Small Group.

1. Now we want the congregant to receive a confirmation text message.
2. The group leader needs an interaction to follow up with the new member to the Small Group.

Small Group Sign up

Name

Active

Description

1. Congregant receives confirmation text.
2. Group leader receives interaction for follow-up with new small

Last Ran: Today - 5:34 PM



**Group —
Add/Remove**

Individual is **added** to one of these groups (**North Financial Freedom Group - Monday Evening, North Life of Christ Group - Tuesday Morning, North Study of Romans Group - Tuesday Evening, or Small Group - Girls with Swords**)

Match a Individual who is

 SMS >

 Interaction >

Assign a 

To

The group leader

And the following people

With the following instructions

Please connect with your new small group member before July 28th.

+

+ Add Action

Done

Giving Pattern

Name
Decreasing Giving Pattern

Description
Tracking former regular givers who are now giving with less regularity

Active

- ♥ Giving — Amount
- ♥ Giving — New Regular Giver
- ♥ Giving — No Longer Giving**
- ♥ Pledge Creation
- 👥 Group — Add/Remove
- 👥 Group — Membership Duration
- 🕒 Attendance
- 📄 Form Submission

Giving — No Longer Giving

A member of ____ gives at least _ **times** per month for _ **months** to **any** category and then does not give for the last _ **months**.

Select a trigger

Match a Individual who is a member of
These Groups...

And who gave at least
Times per month

For
Months

To
Any Category...

And who has not given for the last
Months

+ Add Trigger

Giving Pattern

Name
Decreasing Giving Pattern

Description
Tracking former regular givers who are now giving with less regularity

Active

Triggers

- ♥ Giving — Amount
- ♥ Giving — New Regular Giver
- ♥ Giving — No Longer Giving**
- ♥ Pledge Creation
- 👥 Group — Add/Remove
- 👥 Group — Membership Duration
- 🕒 Attendance
- 📄 Form Submission

Interaction

Assign a
Conversation by Phone

To
 The group leader

And the following people
Search...

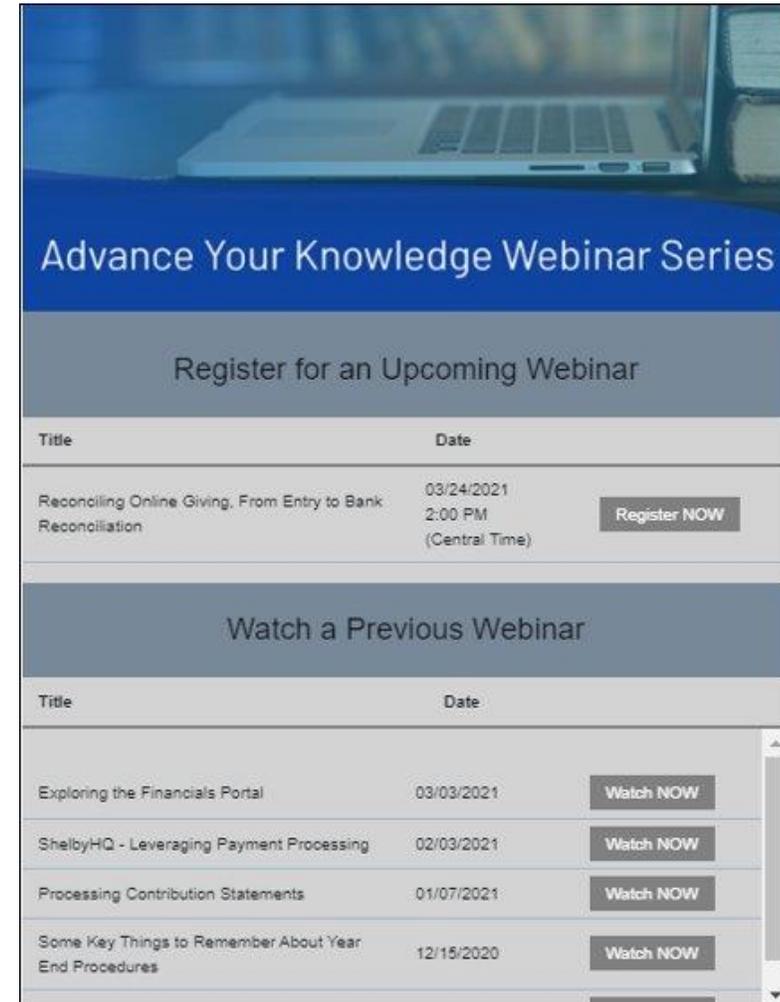
With the following instructions
Member has reduced frequency of giving. Care Team, please reach out regarding possible benevolence needs.

+ Add Trigger **+ Add Action** **Done**

Where can I watch this video again?

**Watch or Register to attend
Webinars**

@ Community.Shelbysystems.com



The screenshot shows a webpage titled "Advance Your Knowledge Webinar Series". It features a section for "Register for an Upcoming Webinar" with a table listing a webinar on "Reconciling Online Giving, From Entry to Bank Reconciliation" scheduled for 03/24/2021 at 2:00 PM (Central Time). Below this is a section for "Watch a Previous Webinar" with a table listing four previous webinars, each with a "Watch NOW" button.

Title	Date	Action
Reconciling Online Giving, From Entry to Bank Reconciliation	03/24/2021 2:00 PM (Central Time)	Register NOW

Title	Date	Action
Exploring the Financials Portal	03/03/2021	Watch NOW
ShelbyHQ - Leveraging Payment Processing	02/03/2021	Watch NOW
Processing Contribution Statements	01/07/2021	Watch NOW
Some Key Things to Remember About Year End Procedures	12/15/2020	Watch NOW

Next “Advance Your Knowledge” Webinar

- Topic: [A Quick Look at Best Practices for Groups and Promotions](#)
Learn how to best use Groups and structure them to keep track of ministries and members. See the most efficient ways to promote classes and move members from group to group while keeping attendance history. Staff Trainers Carmen Dea and Mark Crain will show you a good overview of working with Groups to maximize your ministry and keep up with your members.
- Date: July 28, 2021
- Time: 3pm E/2pm C/12pm P
- Led by: Carmen Dea and Mark Crain

New Virtual Workshops are here!

- Enrollment is now open for May or June classes
- 4 days of online classroom instruction
- 3 hours each day
- Financial and Membership Workshops
- Detailed workbooks included
- Quizzes and discussion
- Lots of great ideas and skill building lessons



[Click Here to Register](#)

Resources

Contact links that are provided in this webinar are unique to Shelby Systems. If you are watching this and use one of our sister companies Giving or ChMS products, please connect with your Success Representatives or Support Team.



Training@shelbyinc.com

Check out the 2021 VBS form for more info & ideas!



[How to Manage Workflows](#)

[Look here for more info on Ministry One!](#)