

Paperless Pledge Options

For many churches annual pledge season is just around the corner. What could it look like for your ministry to move to a more electronic pledge process? Reduce printing, eliminate filing, and maybe receive responses quicker while encouraging automated payments – sound nice? Below are a few of the options you have with ShelbyNext Giving, ShelbyNext Membership, and Arena.

ShelbyNext Membership - Direct Member Entry

Once you have your Pledge Campaign created in Membership for the coming year, you can give your Members the option to make their pledge commitments through the ShelbyNext Membership Portal. Check out these how-to articles:

[Pledge Campaign Creation](#)

To allow members to create their own pledges directly in Membership be sure to check the box below.



[Giving Members Access to their ShelbyNext Membership Account](#)

ShelbyNext Membership/Giving - Staff Entry from Form

Maybe you are not ready to have members directly access their account in Membership and enter their own pledges. Now worries, you can still progress to paperless using Forms.

In ShelbyNext Membership or Giving go to your Form Builder and choose “Start From Scratch” to begin building your form. From the fields on the right, you can begin adding any information you would like to collect from your donors.

- When ready to distribute use the direct link in a [Mass Email](#) to the appropriate Members in your Membership database.
- You will be able to access all your pledge information in the [Form Manager - Responses](#) for a staff member to enter the pledge information on the member record.
- Use [Form Properties>Email](#) to add an email confirmation to the member. You can also add a second email notification to a staff member alerting them of the pledge submission
- [Use a Workflow](#) to automate assigning the donors to a Pledge Group
- Ask if they would like to set up their pledge on a recurring schedule. If they say yes, have either the Fund Drop-down (if you have more than one fund to which they could pledge) or Amount Box (if all pledged money goes to one fund) set with the Condition field property to display for them to enter the amount to deduct each time it is processed. Then they would check “Make this Gift Recurring” to set the processing schedule.

Arena

Once you have your Pledge Campaign created in Arena for the coming year, you can give your members the option to make their pledge commitments and set-up a recurring gift through the Arena Member Responsive Portal.

[Creating Pledge Campaigns](#)

[Pledge Entry Page on Member Portal](#)

[Member Portal Access](#)

Click [HERE](#) to see our different training options if training or consulting is needed.