

Using ShelbyNext Tools as You-Open Your Church for On-Site Services

Last Contributed Date

This is a great new search feature in both the **Advanced** and **Query Search** options. This will filter the list of those shown to those whose latest gift to any giving category falls in the search range chosen. So, if the **Last Contributed Date** is **Before 3/30/2020**, then no one selected has given a gift in April or May. This is also a great filter because they do have to have a giving date, so these are members who gave at some point. If you want to further define the search, you could set the filter to find those whose last contributed date is **On or After 1/01/2020**, but **Before 3/30/2020** to see those who gave in 2020, but not in April or May.

The screenshot shows the 'Individuals Search' interface. At the top, there are three tabs: 'SIMPLE', 'ADVANCED', and 'QUERY SEARCH'. A 'SAVED SEARCHES' button is located on the right. Below the tabs, there are input fields for 'First Name' and 'Envelope Number'. The main search area contains three rows of filters. The first row is for 'Last Attended Date' with a dropdown set to 'Equals'. The second row is for 'Last Contributed Date', with a dropdown menu open showing options: 'Equals' (highlighted in blue), 'On or After', and 'Before'. The third row is for another filter, also with a dropdown set to 'Equals'. Each filter row has associated input fields for dates and ranges.

If you have been tracking attendance for your online services and classes using **Forms** or some other means, you can also use the **Last Attended Date** in the same way to find those without any recent attendance as this will show the most recent attendance posting for ANY group.

Using these two tools together will allow you to quickly locate those whose changes in giving and attendance patterns might illustrate a change in connection to the church or certainly an opportunity for the church to reach out.

Event Registration with limited capacity

Setting up event registration with limits on capacity is simple and helps ensure that there is room for all and nothing is overbooked.

Groups Set Up

The first thing you'll need to do is set up your groups. This allows you to easily track registrants for easy communication and

- Identify all of the events you'll have
- Optional: Create a group property to simplify identification
- Create the groups

The screenshot displays the 'Groups' management interface. At the top, there are tabs for 'LIST', 'ADD', and 'FINDER'. Below these is a search bar labeled 'Search Groups...' and a settings icon. The main area contains a table with the following columns: 'Name', 'Leader(s)', 'Count', and 'Edit'. The table lists four groups, all of which are 'Worship' events. The 'Edit' column includes a blue 'Edit' link and icons for user management and refresh. A footer note states 'Displaying 4 of 248 total Groups.' On the right side, there is a 'Filters' sidebar with a 'Groups' tab selected. The sidebar includes a 'Show active Groups only' checkbox, a 'Match ANY selected properti...' dropdown, and several filter categories: 'Age Groups' (0/7), 'Campus' (0/4), 'Time Period' (0/2), and 'Type' (1/9). The 'Type' dropdown is open, showing options: 'Choir', 'Class', 'Committee', 'Limited Capacity' (which is selected with a checkmark), 'Organization', and 'Organization Group'.

Name	Leader(s)	Count	Edit
Worship - June 14 (11:00 am)		4	Edit
Worship - June 14 (9:00 am)		1	Edit
Worship - June 7 (11:00 am)		6	Edit
Worship - June 7 (9:00 am)		2	Edit

Signup Form

Now that your event groups are created, it's time to build the form for folks to use to sign up.

- Either start from a template or from scratch
- Use a Person field set, named as it makes sense for your usage.
- Optional: Drag email and/or phone number fields into the field set so that you can easily reach out to registrants.
- Drag a Checkbox, Radio Button or Dropdown field into the field set so that it shows above the ADD ANOTHER text in your form builder.
- Make sure to add all of the options to your form with their respective limits.
- It is important to make sure that the names match, both for clarity and for the optional workflow.

The image shows a form builder interface. The top part displays a form titled "Limited Capacity Event Signup" with the instruction "Please register each person who will be attending so that we have room for all." The form includes a "CONFIRMATION EMAIL" field, a "Worship Attendee 1" section with "FIRST NAME" and "LAST NAME" fields, and a "CHOOSE YOUR SERVICE" dropdown menu. Below the dropdown is an "ADD ANOTHER WORSHIP ATTENDEE" button. A right-hand sidebar lists various field types: Long Text, Checkbox(es), Radio Button(s), Dropdown, Date, Numbers, Letters, File Upload, Digital Signature, FIELD SET (Basic, Person), STATIC CONTENT (Section Header, Static Text, Divider, Empty Space), and CONTACT INFO FIELDS (Person's Name, Email, Phone Number, Address).

The bottom part of the image shows the "Field Properties: Choose Your Service" dialog box. It has tabs for GENERAL INFO, OPTIONS, VALIDATION, and CONDITIONS. The OPTIONS tab is active, showing a table with columns for "Display" and "Total Quantity".

Display	Total Quantity
Worship - June 7 (9:00 am)	20
Worship - June 7 (11:00 am)	20
Worship - June 14 (9:00 am)	20
Worship - June 14 (11:00 am)	20

Below the table is a checkbox for "SHOW 'OTHER' OPTION" and a "SPECIFY VALUE" link. At the bottom of the dialog are "CANCEL" and "OK" buttons.

- Optional:

- Create an email within form properties to notify someone on staff of incoming submissions.
- Add another email field outside of the field set for “Confirmation email”
Create an email within form properties using that confirmation field placeholder as the to address. Make sure to use your field set field placeholder within the email so that details are returned to the registrant.

Form Properties: Limited Capacity Event Signup

GENERAL INFO THEME ADVANCED THEME HTML SUBMISSION PAYMENT **EMAIL**

TO

#Confirmation Email#

Accepts email address(es), Billing Email or Email field placeholders

FROM

staff@firstchurch.org

Accepts a Billing Email or Email field placeholder or format: First Last <email>

SUBJECT

Thank you for Signing up for the service

MESSAGE

H1 H2 H3 H4 H5 H6

B I U

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</>

We show you as signing up for

#Worship Attendee#

PLACEHOLDERS

CONFIRMATION EMAIL

WORSHIP ATTENDEE

CREATEDAT


BILLINGADDRESS

BILLINGEMAIL

TOTALAMOUNT

CANCEL
OK


- Save and publish, and from the publish window click the link for “Create a Workflow with this Form”



Form Successfully Published
Share Your Form With Others


EMBED CODE

```
<script
src="https://forms.ministryforms.net/embed.aspx?formId=f1440bf5-734a-4a42-ab9f-5ba21af01ce9&custom-templates=">
</script>
```



Copy and paste this code to display this form on your site

PUBLIC SHARE LINK

[https://](https://...)




Anyone can access the form with this link

[CREATE A WORKFLOW WITH THIS FORM](#)

CLOSE

Building out the Workflow

- If you’ve added email and phone, map those over.
- Select +ADD ACTION and choose Group.
- Pick your dropdown field under “Select an Option”
- Select done, hit save and you’re ready to publish your form.

Name	Description
<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <input type="text" value="Limited Capacity Service"/> </div> <div style="display: flex; align-items: center;"> <input checked="" type="checkbox"/> Active </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Last Ran: Today - 5:47 PM</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;">  <p>Form Submission</p> <p>The Limited Capacity Event Signup Form is submitted.</p> </div> <div style="text-align: center;">  <p>Group</p> </div> </div> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>When the following form is submitted</p> <div style="border: 1px solid gray; padding: 2px; display: flex; justify-content: space-between;"> Limited Capacity Event Signup ▼ </div> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Map</p> <div style="border: 1px solid gray; padding: 2px; display: flex; justify-content: space-between;"> Worship Attendee (f ▼ to Full Name </div> <p>This trigger and actions will run for each person in the fieldset.</p> <p>Map More Fields</p> <p>And match People based on</p> <div style="border: 1px solid gray; padding: 2px; display: flex; justify-content: space-between;"> Name ▼ </div> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> + ADD ACTION DONE </div> </div>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Add the person to ▼ 🗑️ </div> <div style="border: 1px solid gray; padding: 2px; margin-top: 5px;"> These Groups... </div> <p>And/Or a group that matches exactly the value selected in this form field:</p> <div style="border: 1px solid gray; padding: 2px; margin-top: 5px; display: flex; justify-content: space-between;"> Choose Your Service (fieldset) ▼ </div> </div>

Handling your events at check-in time

You may choose to have folks register and simply have them show their confirmation email as their proof or just take folks at their word.

If however you also wish to be able to track exactly who came you should use check-in. While self check-in may be a staple in your children's ministry this is a great opportunity to increase record keeping without needing to increase contact.

- MinistryOne Check-in
 - Folks can check in right from the MinistryOne app. [Click here](#) to read in depth.
- Staff-led check in
 - You can have your staff running check-in on their devices and handling all check-in to remove the need for any shared contact of devices.

Have way more questions about check-in? [Click here](#) to learn more.