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.

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

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.

- Optional:

- o Create an email within form properties to notify someone on staff of incoming submissions.
- o 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   ≡ ≡   🖼 % </>

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/emb
ed.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://

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

Limited Capacity Service

Description

☑ Active

Last Ran: Today - 5:47 PM   ...

Form Submission

The **Limited Capacity Event Signup** Form is submitted.

When the following form is submitted

Limited Capacity Event Signup ▼

Map

Worship Attendee (f ▼ to **Full Name**

This trigger and actions will run for each person in the fieldset.

Map More Fields

And match People based on

Name ▼

Group >

Add the person to ▼ 🗑

These Groups...

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

Choose Your Service (fieldset) ▼

+ ADD ACTION   **DONE**

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 to able 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 stuff 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.