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Unify Church Operations with an Integrated ChMS and Giving Solution

APRIL 27, 2023

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Today's Speakers

Jeannetta Douglas

Customer Success

Kristen Foster

Giving Success

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Agenda

1. Donor Experience
2. Benefits of an Integrated Solution
3. Simplified Switching
4. New Features Coming Soon

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Donor Experience

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Make Giving Native

Embedded Form Options

Donors need to feel safe and connected when they give. You don't have to redirect a giver or registrant to another site to give, then hope they come back to learn more. Make that same safe giving experience part of your website.

A MOVEMENT OF EVERY DAY GENEROSITY

It's amazing to see God's creativity, love, and generosity on full display each and every day. Our church family generously give their time, service, talents, and treasures through so many acts of worship, and we invite you to join us in our movement of every day generosity!

Whether it be rocking out with our worship teams, donating and transporting goods to the shelters, serving with volunteer teams on the weekend, using text-to-give, or dropping some dollars into the giving bucket. Each and every act of generosity matters and helps change the lives of others. Everyone's gifts and service are acts of worship that truly bring us all closer to our Creator!

South Campus Giving

One-time | Recurring

Fund

$ Amount

+ Add Donation

Submit!

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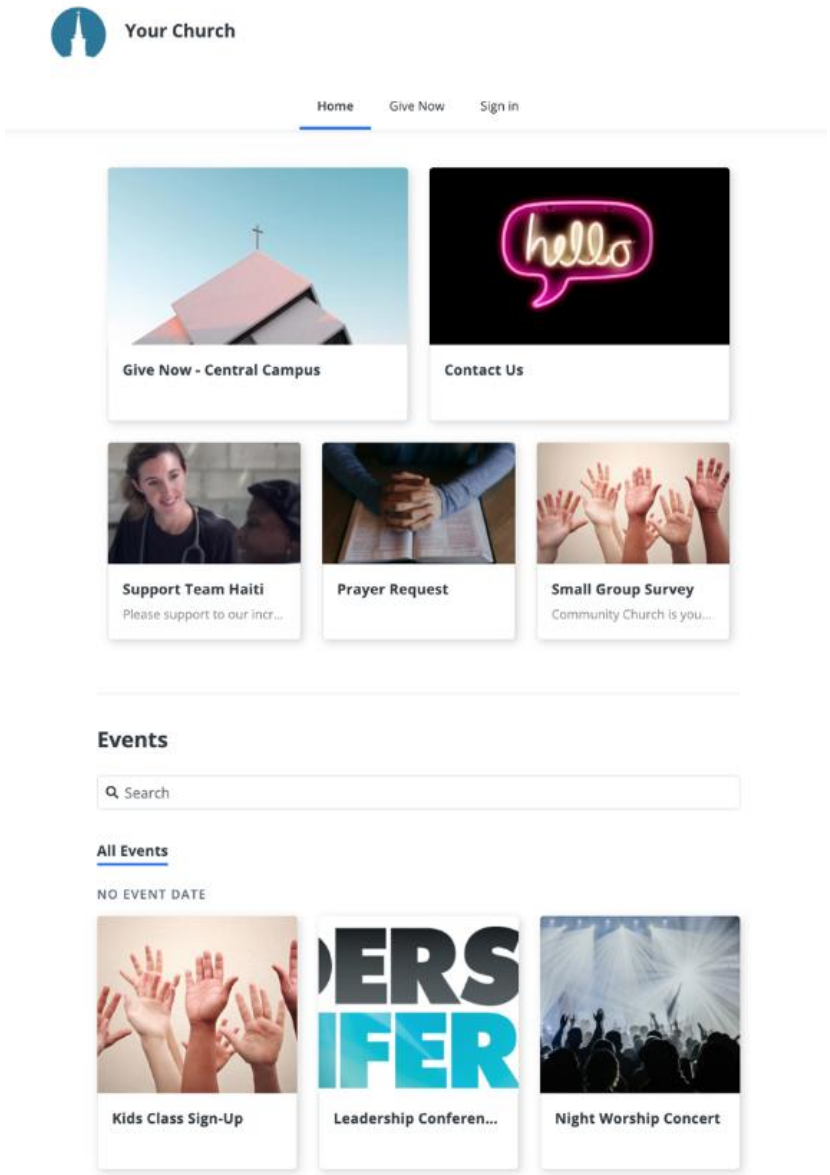
Home Page

Encourage Engagement

Imagine, all your forms in one place to be easily found by those you serve. Your custom forms can be displayed in a unique Home Page layout – with or without an organization website.



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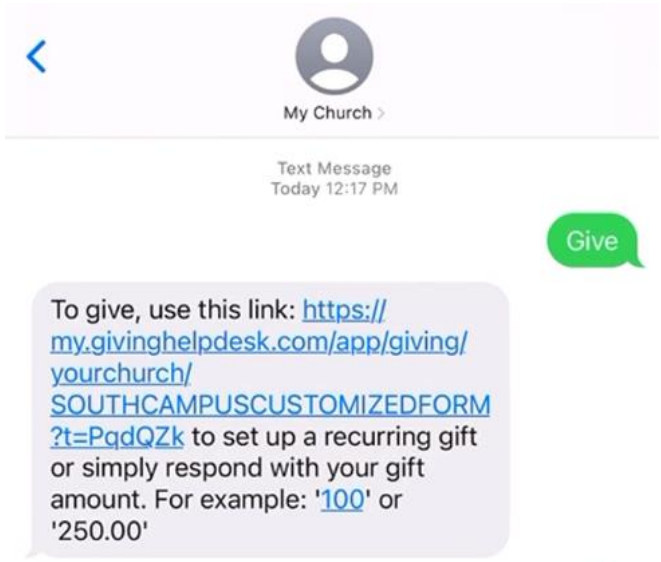
Giving in the Moment

Inspire your audience to take action

Don’t leave engaging donors, members and participants to the chance that they will remember to go to the website later or after service to give. Make it easy to give when they are inspired.



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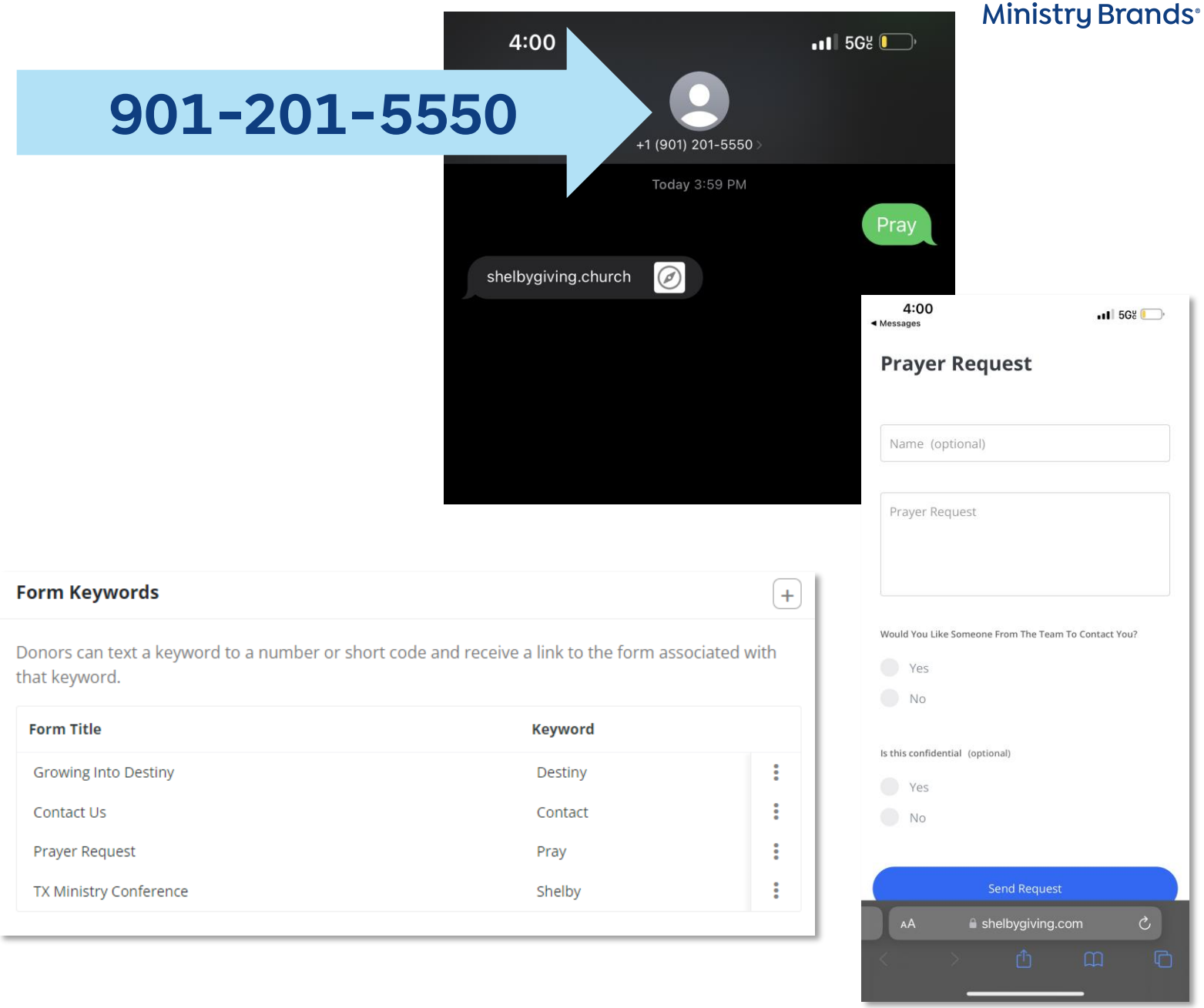
Instant Engagement

Inspire your audience to take action

Don’t leave donors, members and participants to the chance that they will remember to go to the website later or after service to engage with your ministry.



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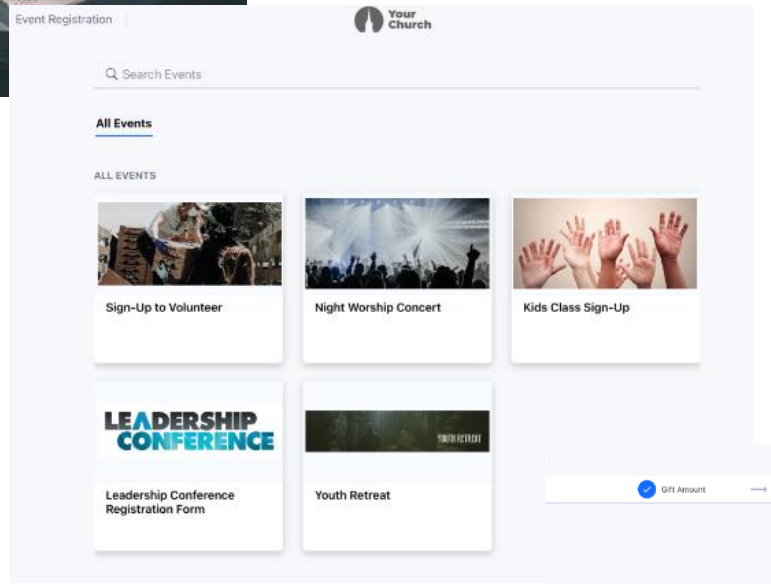
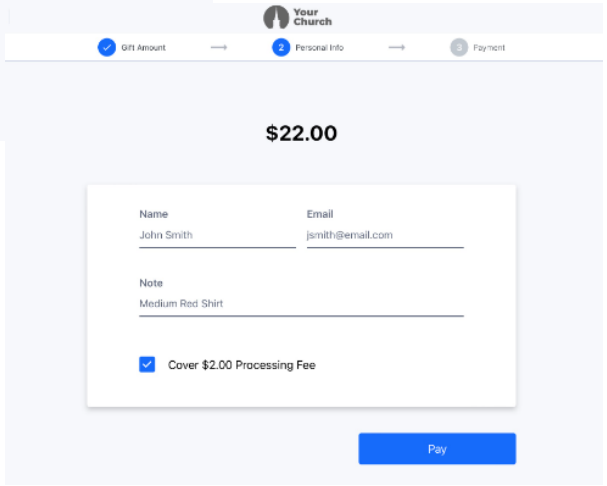
In-Person Option

Flexibility of Kiosk Functions

Make it easier than ever for people to give or register for events in person with kiosks. Our kiosk app and card readers make for a great experience that you can create right in your lobby!





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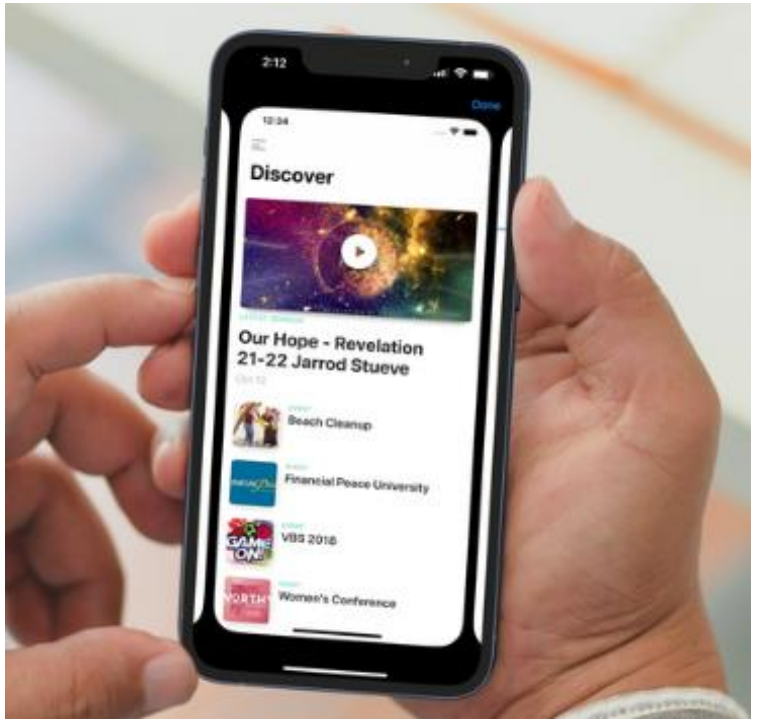
Stay Connected

User Friendly MinistryOne Mobile App

Give your people the opportunity to Stay Connected to your ministry by utilizing our Mobile App. It is included in your online giving platform!



View Video or Podcast Content

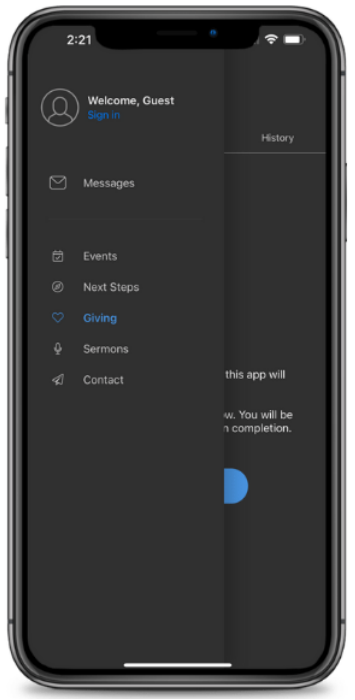
Digital Directory

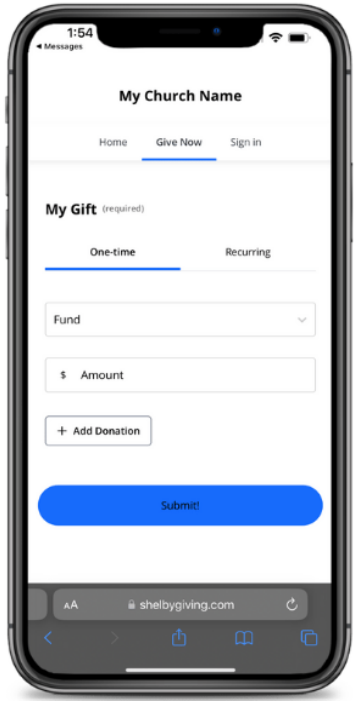
Children's Check In

Give

Register for Events

View Ministry Calendar





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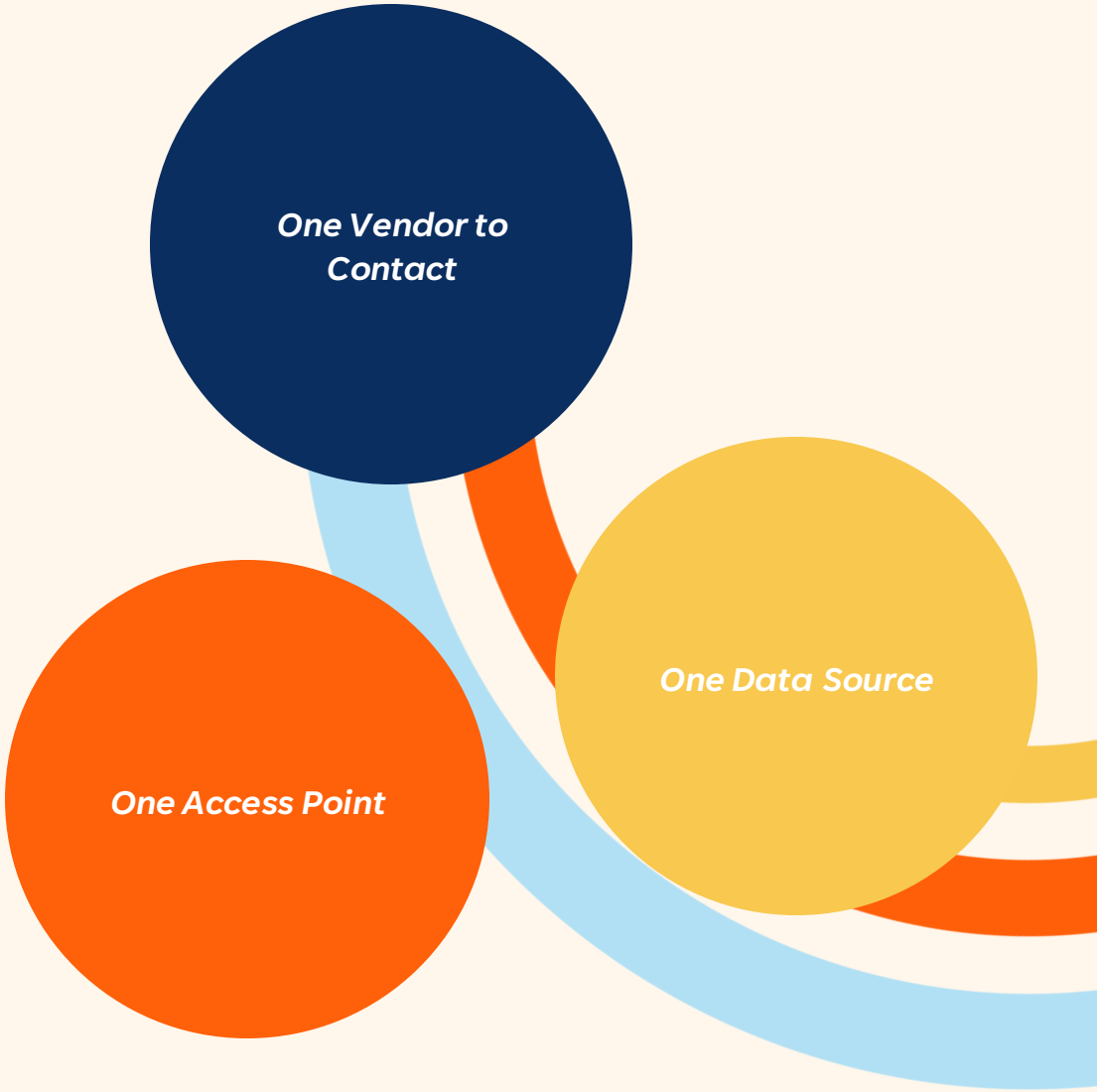
Centralization

All Roads Lead to One Place



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Benefits of Integration

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- Reduce Opportunity for Errors

- Reduce Opportunity for Errors
- Clear Accounting Trail

- Reduce Opportunity for Errors
- Clear Accounting Trail
- Ease of Reconciliation

- Reduce Opportunity for Errors
- Clear Accounting Trail
- Ease of Reconciliation
- Save Time and Money

The Power of Integration

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Power of Integration

Digital Giving
Donors make gifts and payments through multiple formats: Forms, Website, Text, QR, Mobile, Kiosk

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Power of Integration

Digital Giving

Donors make gifts and payments through multiple formats:
Forms, Online, Text, QR, Mobile, Kiosk

ChMS Giving

Individual records show date of payment/gift Payments are batched/grouped by Deposit Date	Giving Categories are mapped to Accounts in Financials. Sync deposits/batches from ChMS to Financials.

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Power of Integration

Digital Giving

Donors make gifts and payments through multiple formats:
Forms, Online, Text, QR, Mobile, Kiosk

ChMS Giving

Individual records show date of payment/gift Payments are batched/grouped by Deposit Date	Giving Categories are mapped to Accounts in Financials. Sync deposits/batches from ChMS to Financials.

Financials

Synced batch from ChMS creates Journal Revenue appears in General Ledger Reports	Deposit appears in Bank Account Management Bank Account Management reconciles to Bank Statement

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The Transaction Journey

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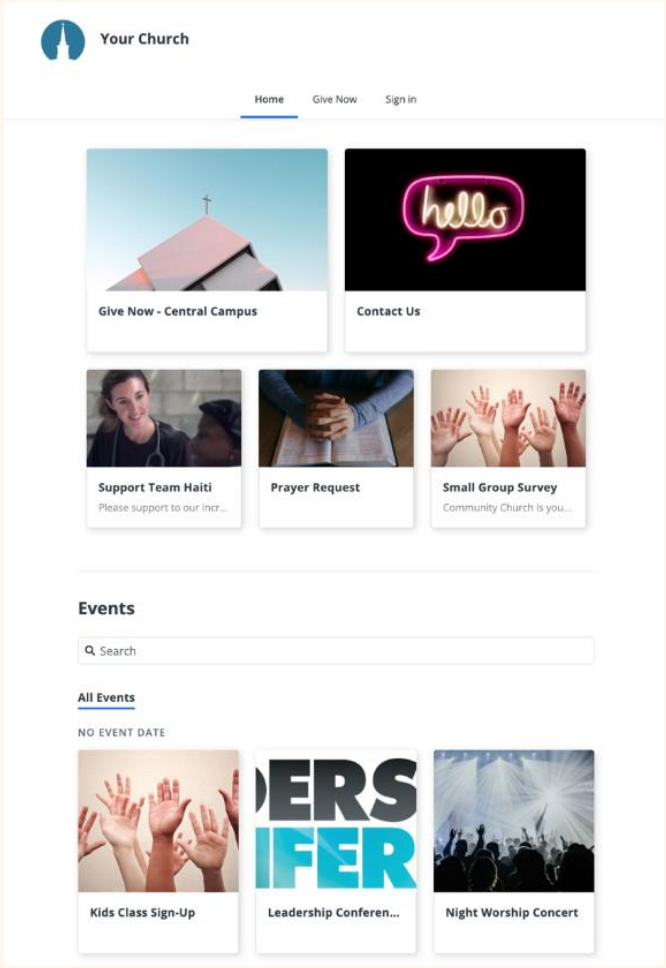

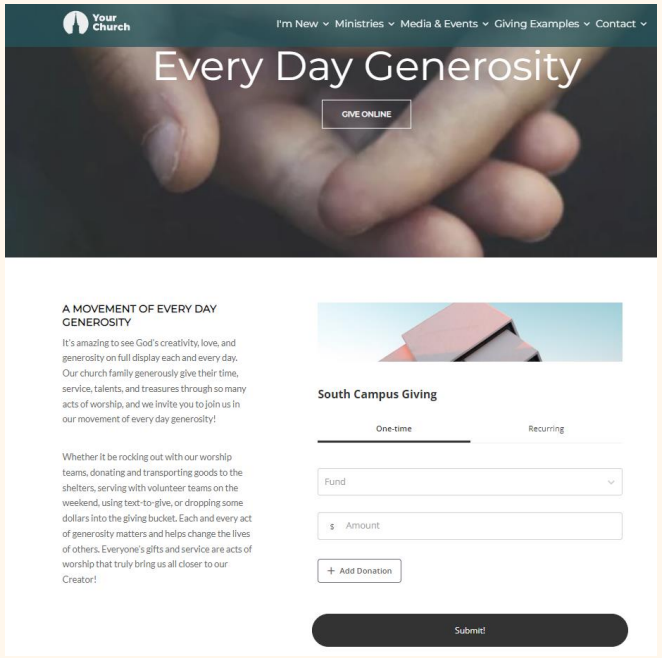

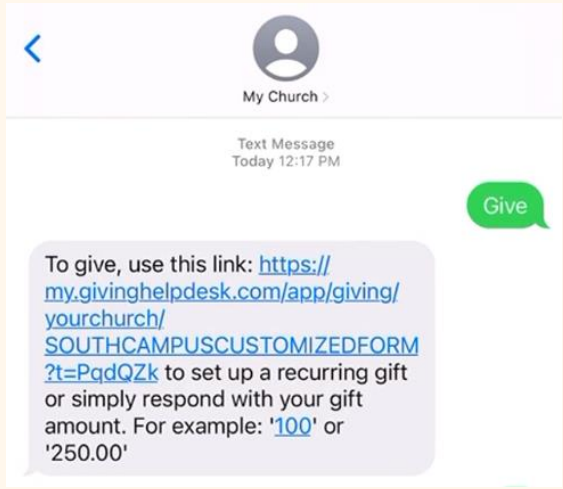

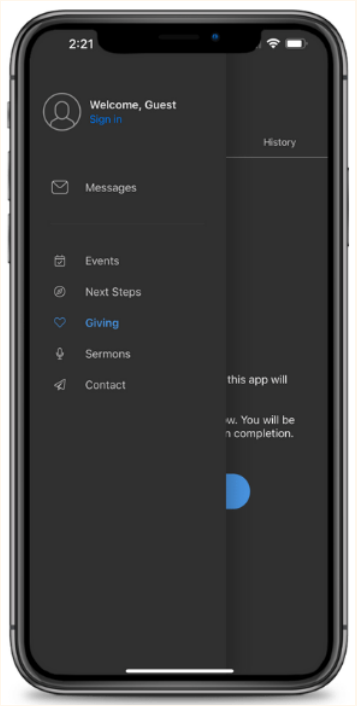

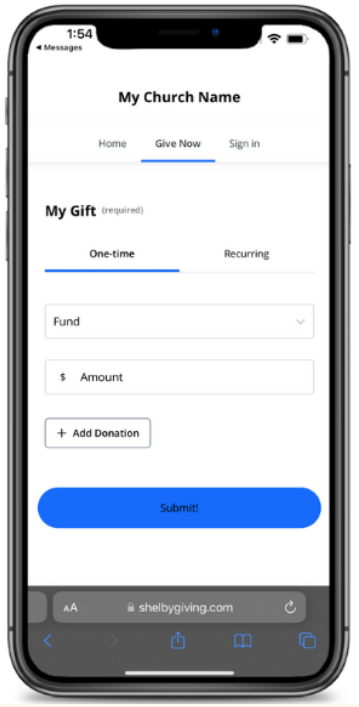

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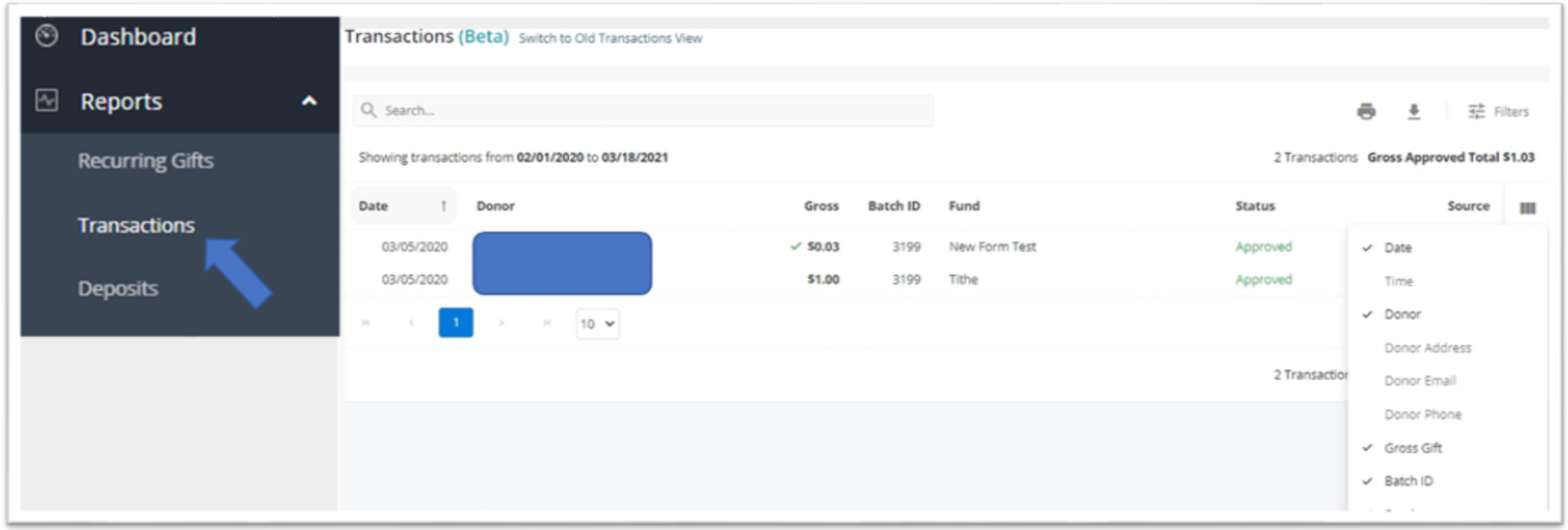
Online Giving Reporting - Transactions and Deposits



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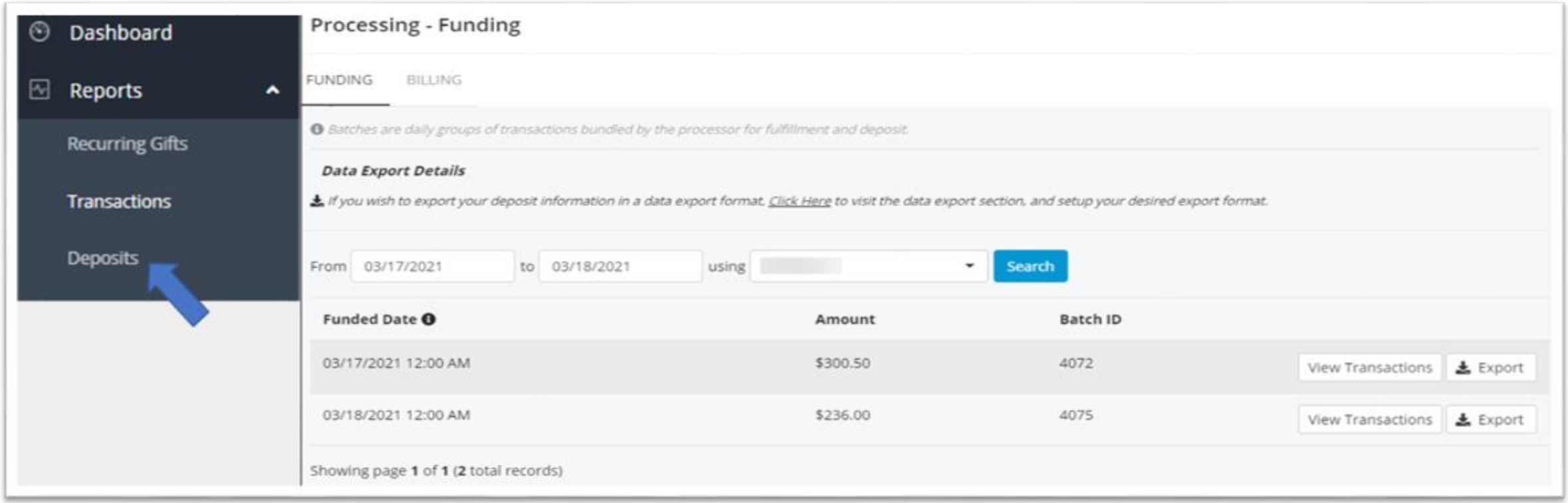
Online Giving Reporting - Transactions and Deposits



- Deposit Transmission Date Driven
- Syncs to ChMS Giving Batches with name "Online Giving Batch #XXXX"
- Can be downloaded
- Can view detail of all gifts/transactions included in the deposit by using the "View Transactions" Button

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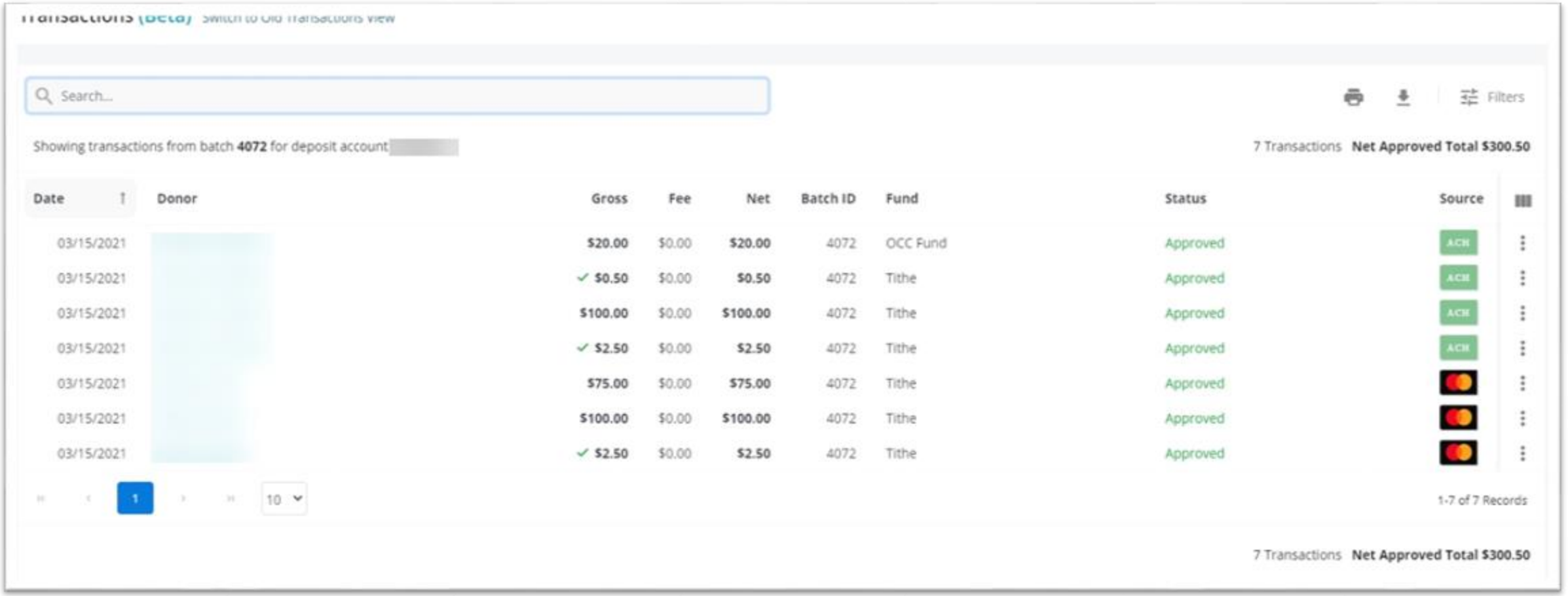
Giving - Deposit Batch Detail



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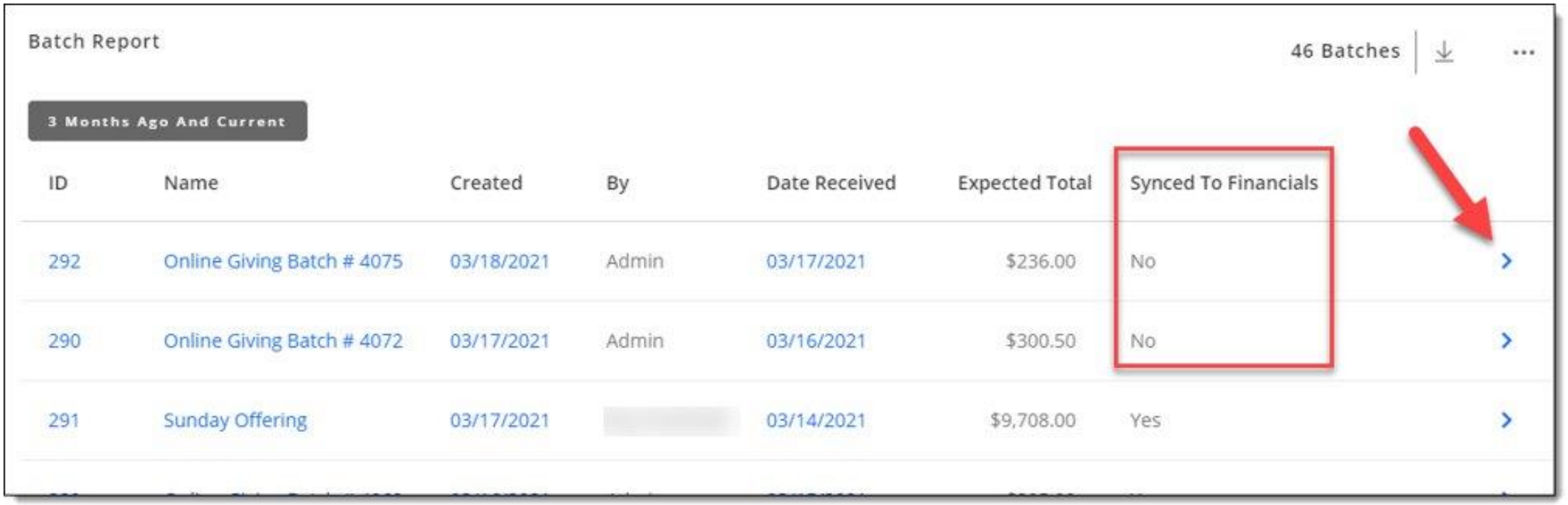
ChMS - Batches vs. Giving History



- Payments are batched by deposit
- The Batch Report tab indicates which batches have or have not been Synced to the Financials

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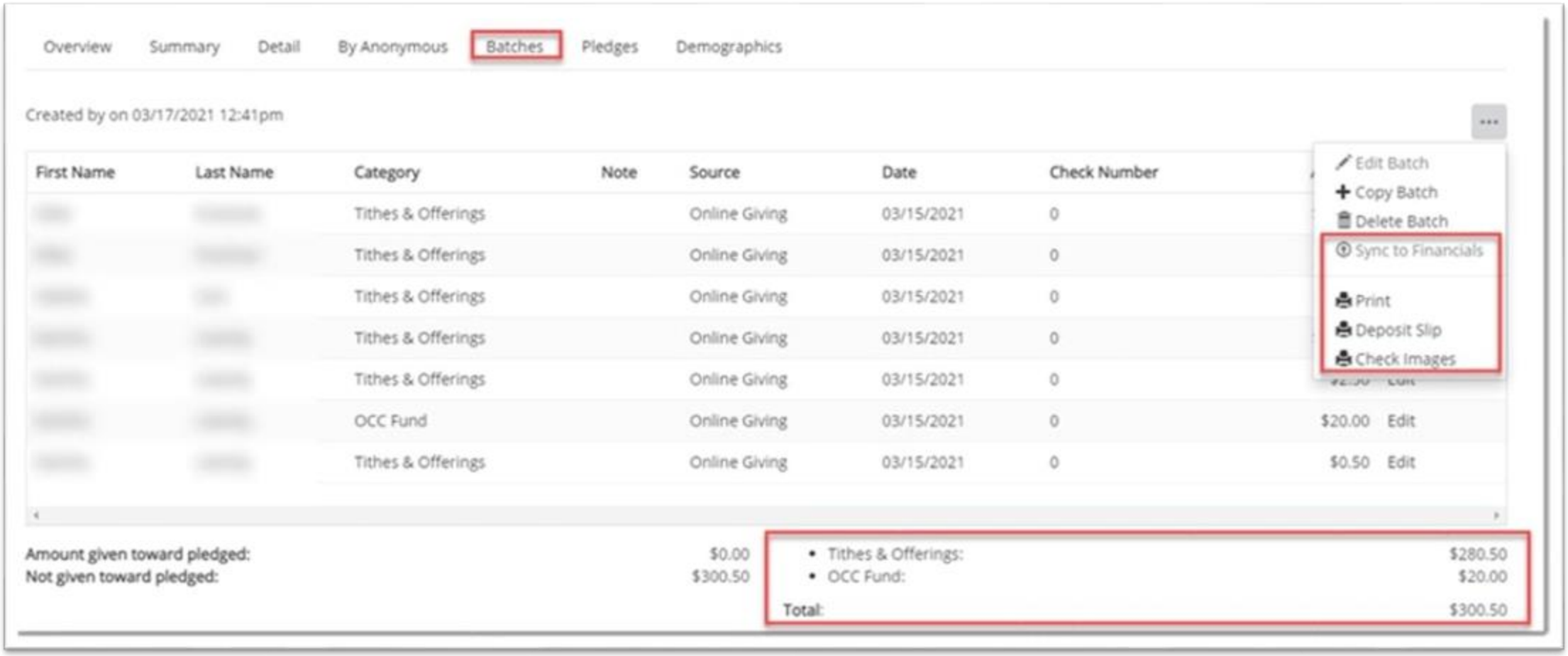
ChMS - Batches vs. Giving History



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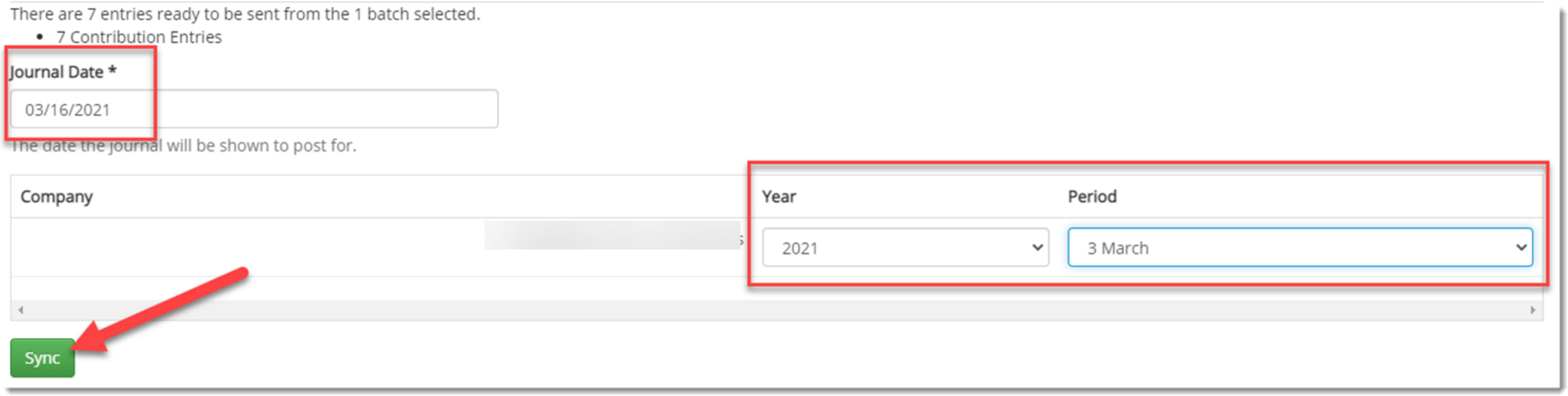
Financials - Syncing



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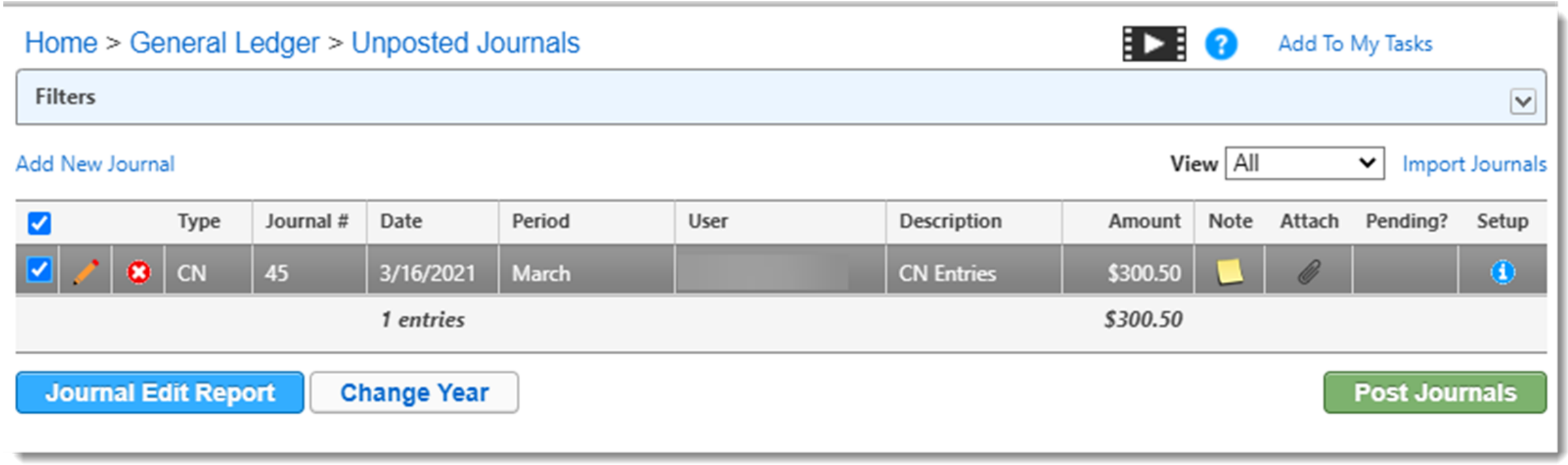
Financials - Unposted Journal



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Clear & Transparent Reporting

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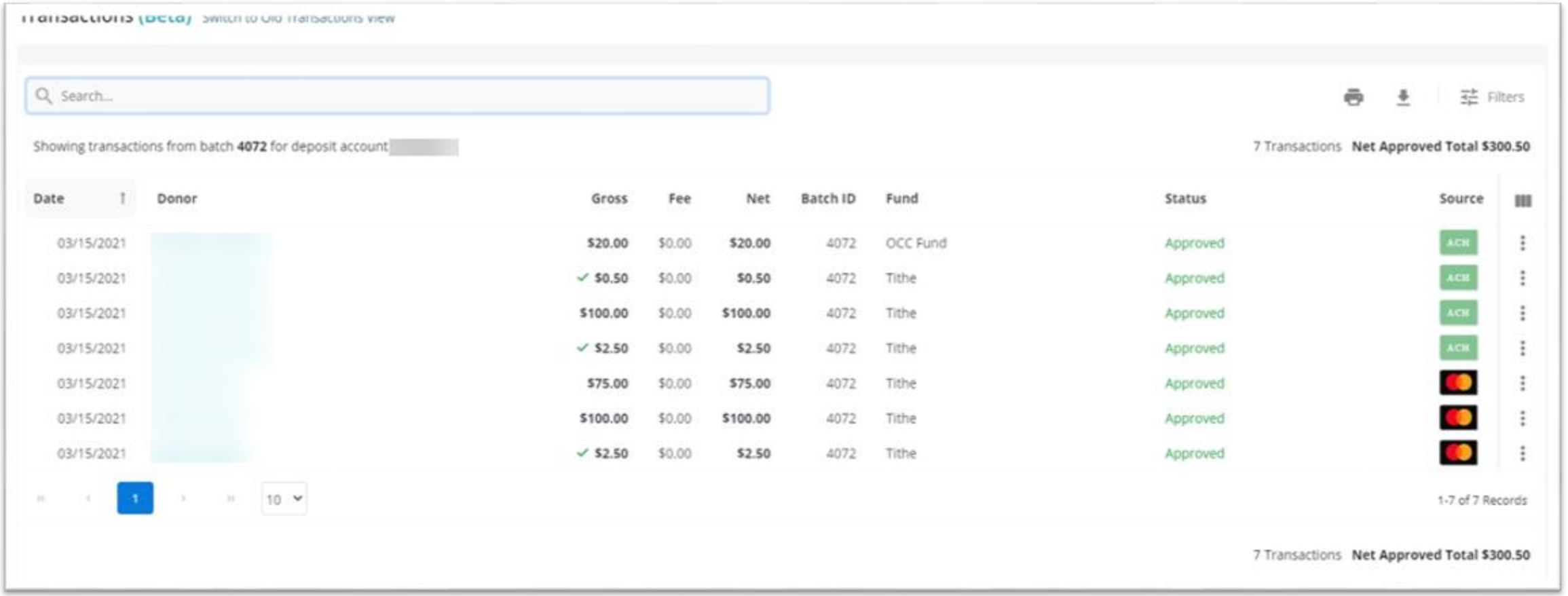
Giving - Deposit Batch Detail



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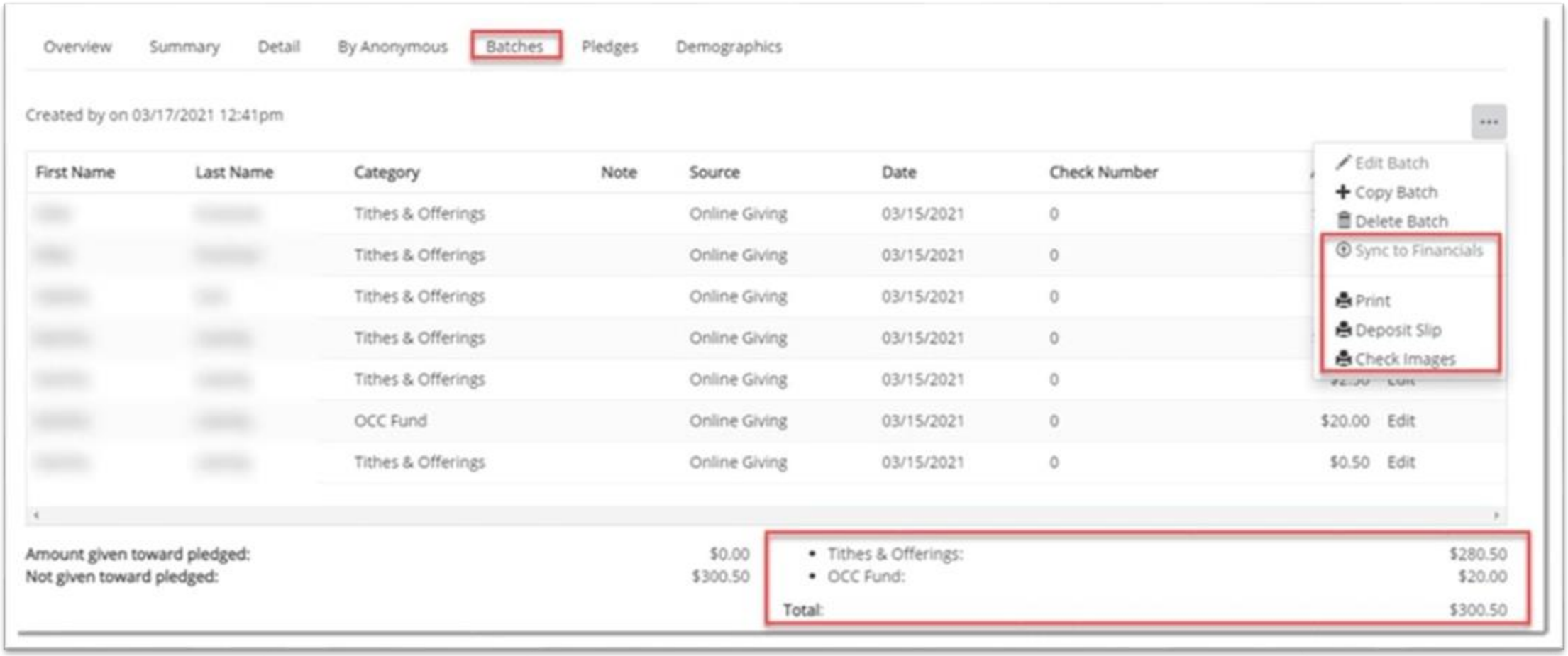
ChMS - Batch



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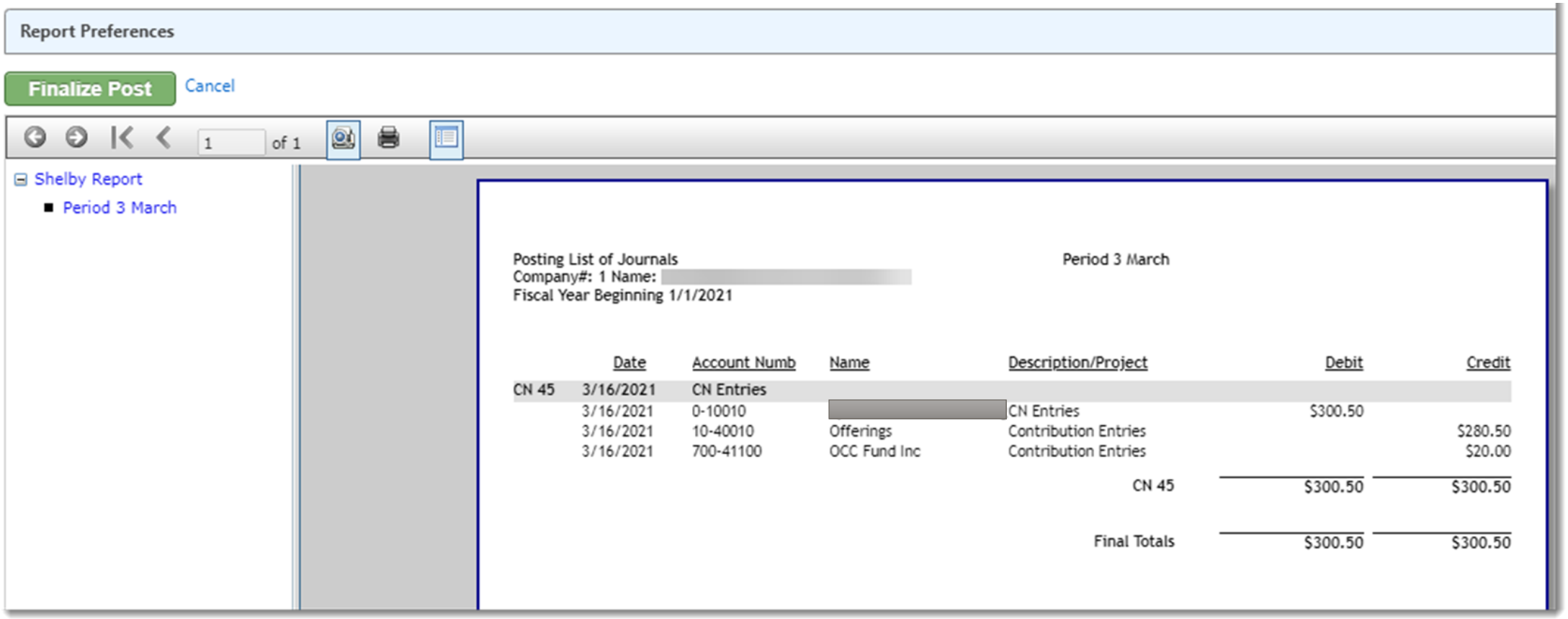
Financials - Journal Entry



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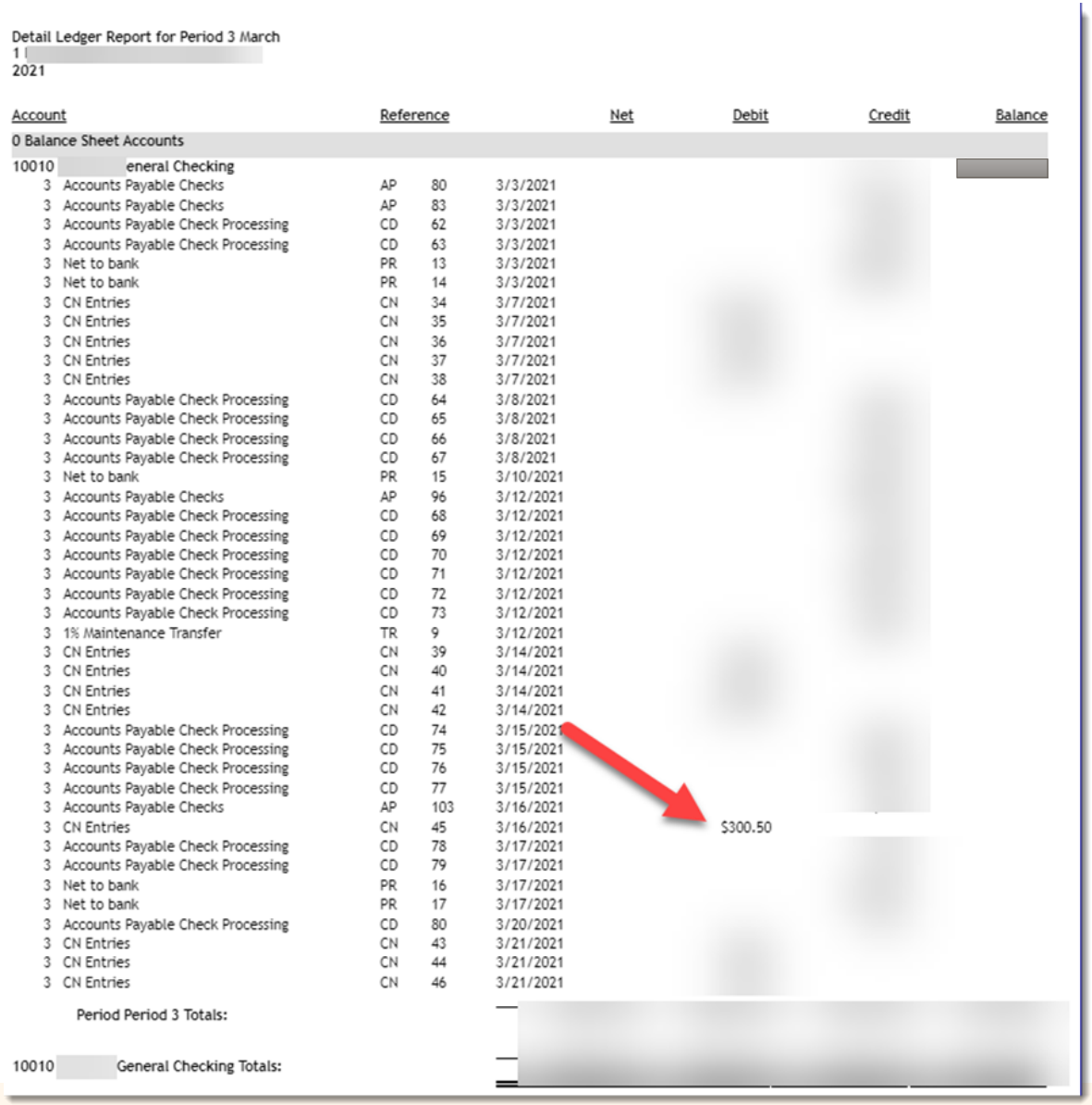
Financials - Journal Entry

Deposit also appears in the **General Ledger**
Bank (Asset) Account.



Detail Ledger Report for Period 3 March
1 [redacted]
2021

Account		Reference			Net	Debit	Credit	Balance
0 Balance Sheet Accounts								
10010	eneral Checking							[redacted]
3	Accounts Payable Checks	AP	80	3/3/2021			[redacted]	
3	Accounts Payable Checks	AP	83	3/3/2021				
3	Accounts Payable Check Processing	CD	62	3/3/2021				
3	Accounts Payable Check Processing	CD	63	3/3/2021				
3	Net to bank	PR	13	3/3/2021				
3	Net to bank	PR	14	3/3/2021				
3	CN Entries	CN	34	3/7/2021				
3	CN Entries	CN	35	3/7/2021		[redacted]		
3	CN Entries	CN	36	3/7/2021				
3	CN Entries	CN	37	3/7/2021				
3	CN Entries	CN	38	3/7/2021				
3	Accounts Payable Check Processing	CD	64	3/8/2021				
3	Accounts Payable Check Processing	CD	65	3/8/2021				
3	Accounts Payable Check Processing	CD	66	3/8/2021				
3	Accounts Payable Check Processing	CD	67	3/8/2021				
3	Net to bank	PR	15	3/10/2021				
3	Accounts Payable Checks	AP	96	3/12/2021				
3	Accounts Payable Check Processing	CD	68	3/12/2021				
3	Accounts Payable Check Processing	CD	69	3/12/2021				
3	Accounts Payable Check Processing	CD	70	3/12/2021				
3	Accounts Payable Check Processing	CD	71	3/12/2021				
3	Accounts Payable Check Processing	CD	72	3/12/2021				
3	Accounts Payable Check Processing	CD	73	3/12/2021				
3	1% Maintenance Transfer	TR	9	3/12/2021				
3	CN Entries	CN	39	3/14/2021				
3	CN Entries	CN	40	3/14/2021				
3	CN Entries	CN	41	3/14/2021				
3	CN Entries	CN	42	3/14/2021				
3	Accounts Payable Check Processing	CD	74	3/15/2021				
3	Accounts Payable Check Processing	CD	75	3/15/2021				
3	Accounts Payable Check Processing	CD	76	3/15/2021				
3	Accounts Payable Check Processing	CD	77	3/15/2021				
3	Accounts Payable Checks	AP	103	3/16/2021				
3	CN Entries	CN	45	3/16/2021		$300.50		
3	Accounts Payable Check Processing	CD	78	3/17/2021				
3	Accounts Payable Check Processing	CD	79	3/17/2021				
3	Net to bank	PR	16	3/17/2021				
3	Net to bank	PR	17	3/17/2021				
3	Accounts Payable Check Processing	CD	80	3/20/2021				
3	CN Entries	CN	43	3/21/2021				
3	CN Entries	CN	44	3/21/2021				
3	CN Entries	CN	46	3/21/2021				
Period Period 3 Totals:					[redacted]			
10010	General Checking Totals:							

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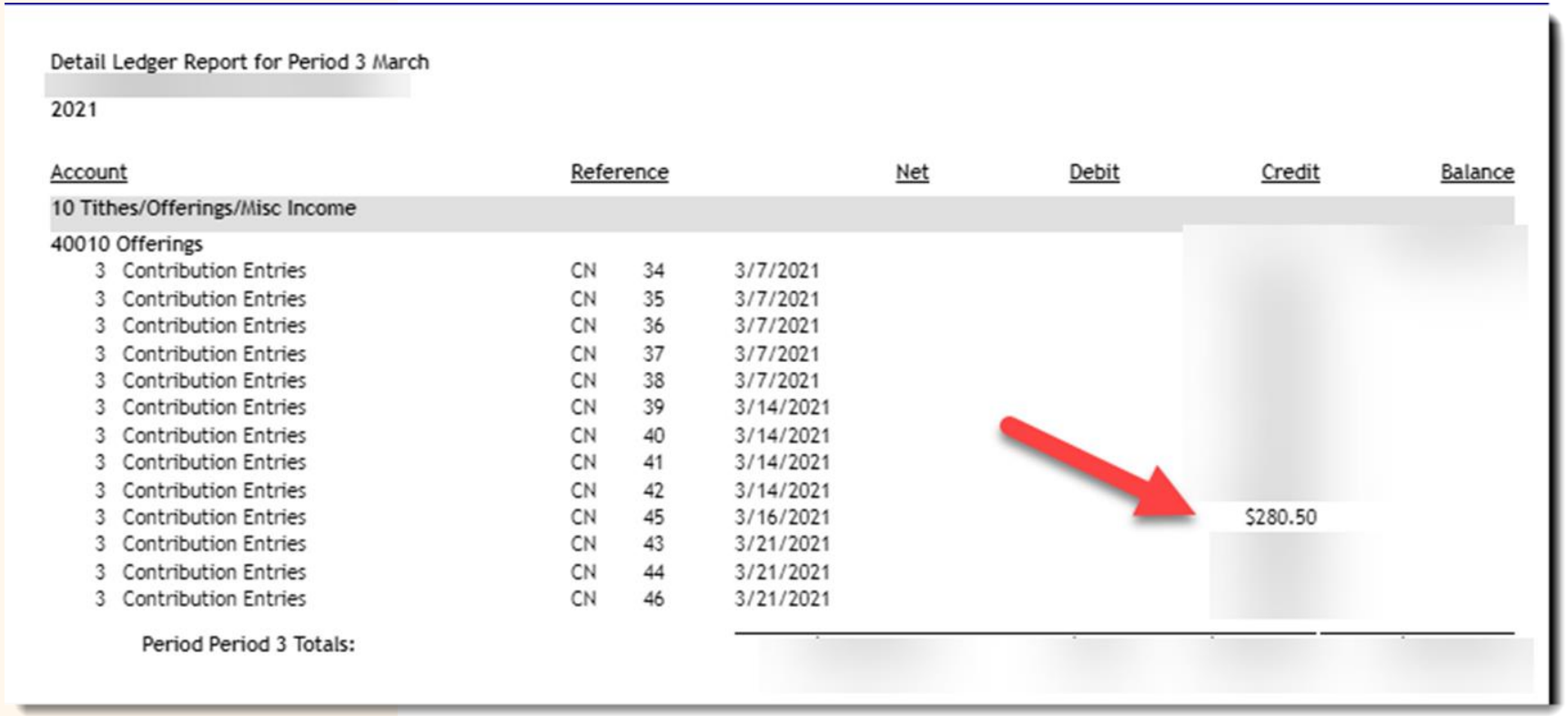
Financials - Reports

…and the General Ledger **Income, Liability, or Expense** Accounts.



Detail Ledger Report for Period 3 March

2021

Account	Reference			Net	Debit	Credit	Balance
10 Tithes/Offerings/Misc Income							
40010 Offerings							
3 Contribution Entries	CN	34	3/7/2021				
3 Contribution Entries	CN	35	3/7/2021				
3 Contribution Entries	CN	36	3/7/2021				
3 Contribution Entries	CN	37	3/7/2021				
3 Contribution Entries	CN	38	3/7/2021				
3 Contribution Entries	CN	39	3/14/2021				
3 Contribution Entries	CN	40	3/14/2021				
3 Contribution Entries	CN	41	3/14/2021				
3 Contribution Entries	CN	42	3/14/2021				
3 Contribution Entries	CN	45	3/16/2021			$280.50	
3 Contribution Entries	CN	43	3/21/2021				
3 Contribution Entries	CN	44	3/21/2021				
3 Contribution Entries	CN	46	3/21/2021				
Period Period 3 Totals:							

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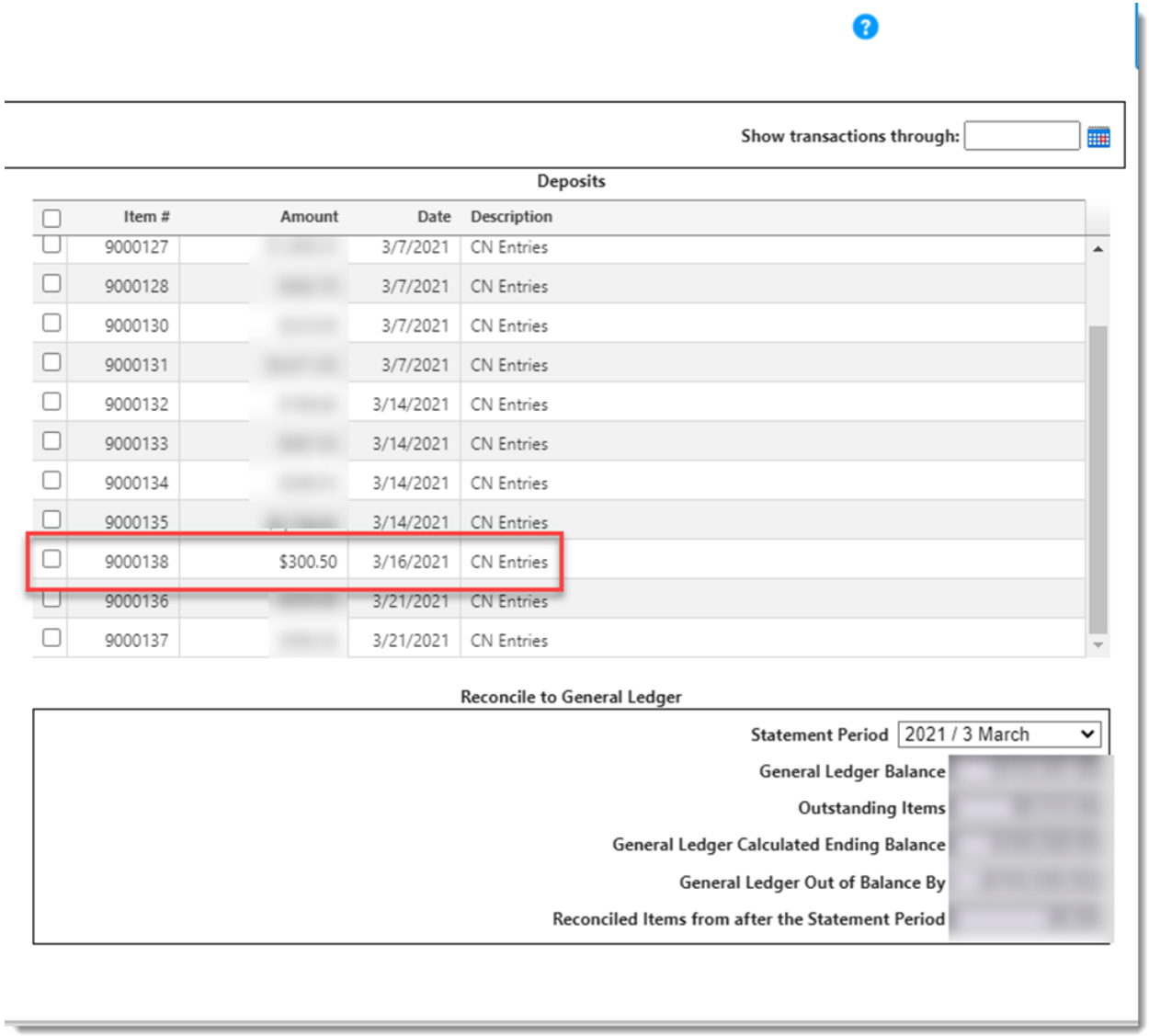
Financials
Bank Reconciliation

- Deposit appears in **Bank Account Management** ready to be reconciled.
- This deposit will match the deposit on the Bank Statement.



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More Time Saving Opportunities

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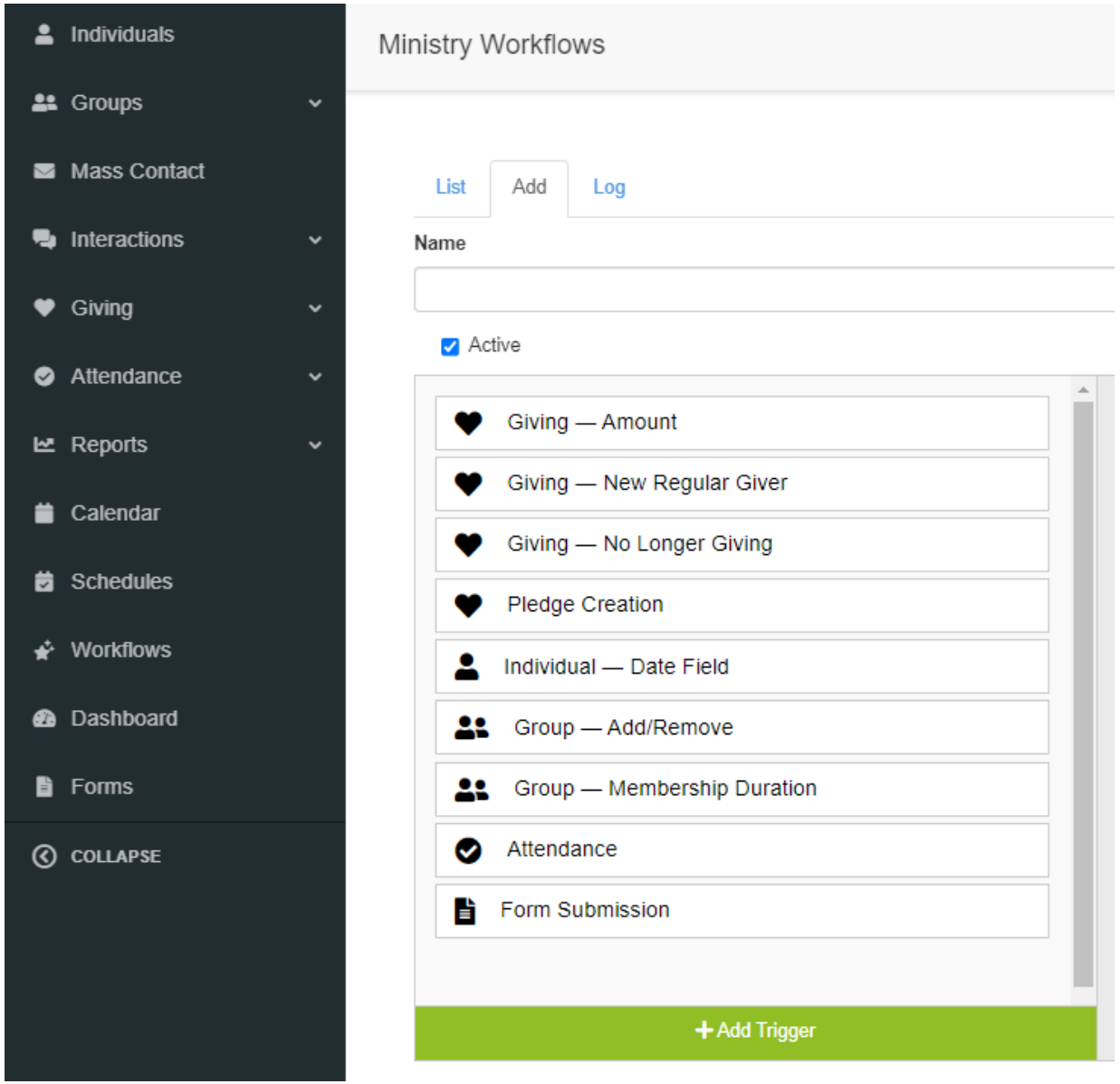
Work Smarter

Create automations for greater engagement

Common time management theme of Simplify, Automate, Delegate, Eliminate



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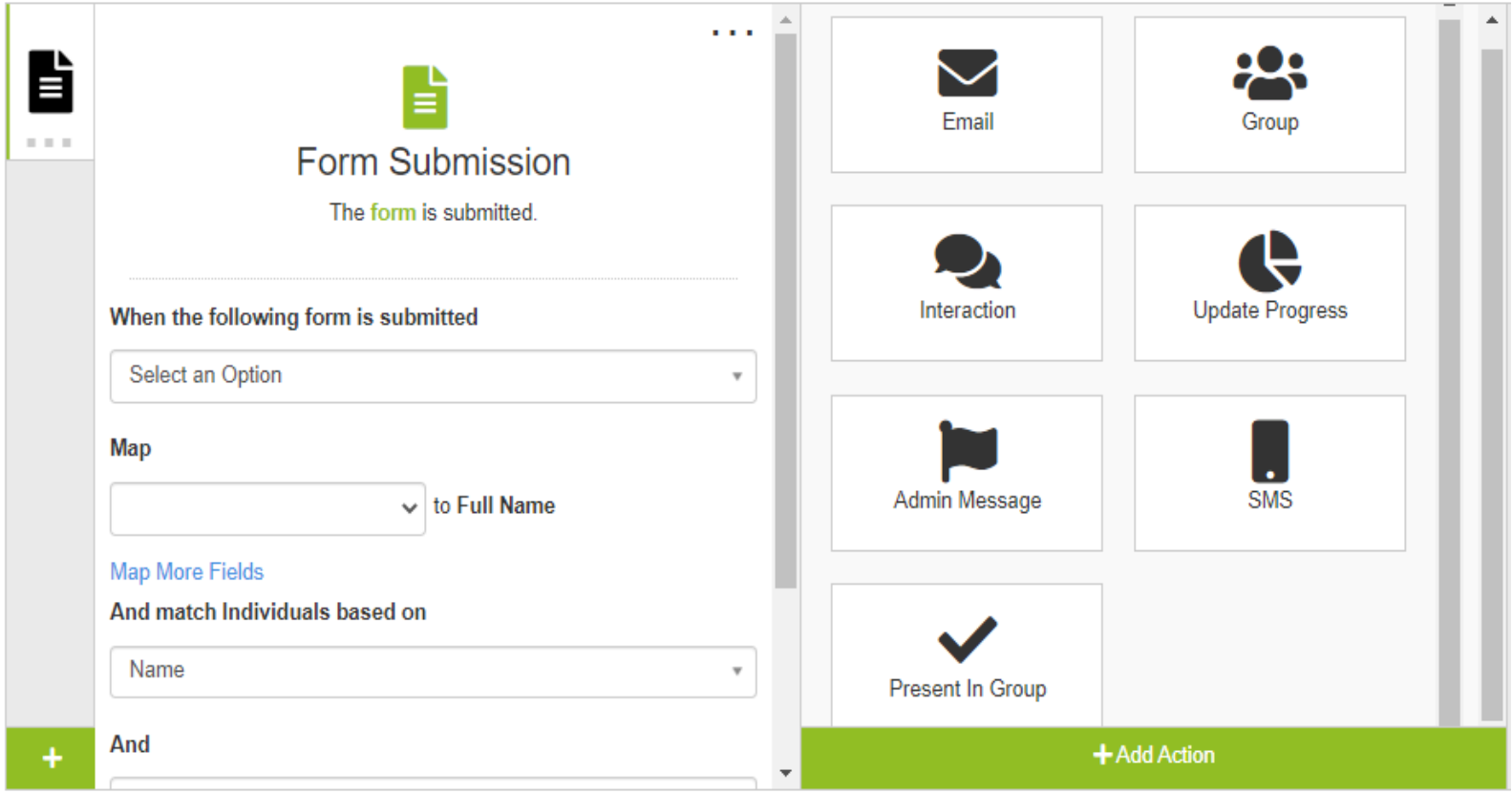
Step up Care

Create automations for greater engagement

Take member care to the next level. No more wondering if follow-up was completed or if a visitor card got lost.



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Simplified Switching

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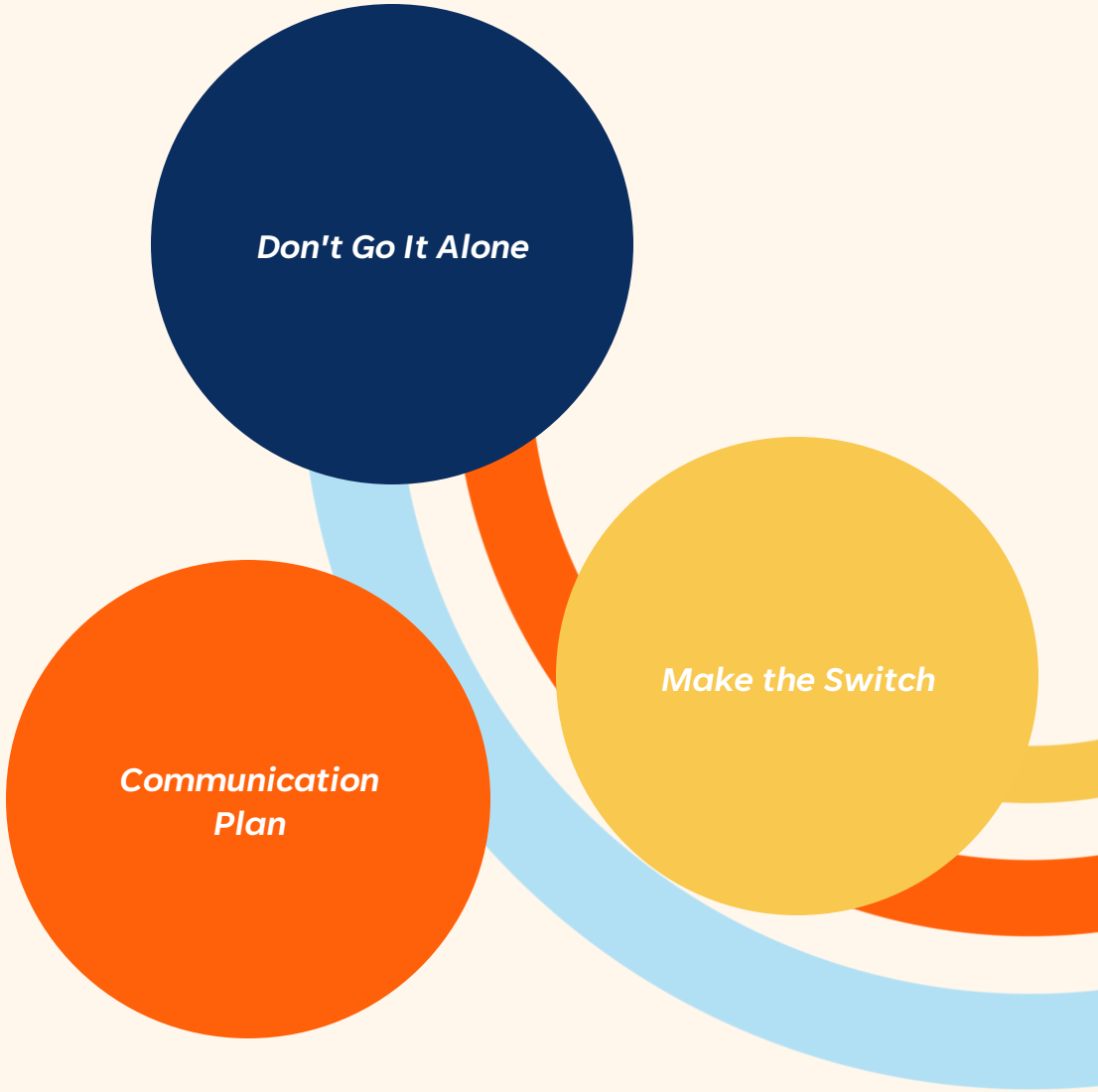
Donor Import

Simplified Switching



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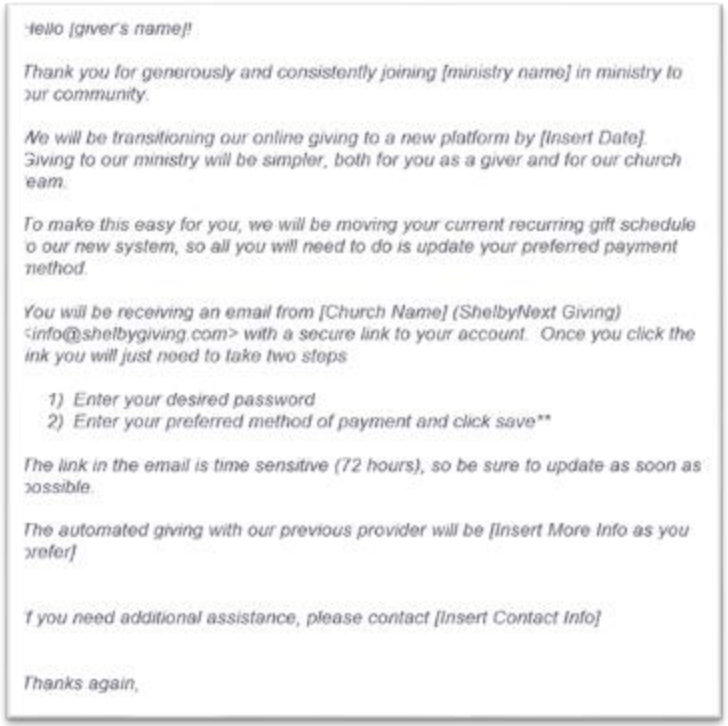
Donor Import

Simplified Switching

Let's work together to create a plan to communicate the switch, collect the data needed, and make it happen seamlessly for your donors

You Never Have to Go It Alone

You will have access to your own Giving Success Coach to walk you through every step of the process of switching.



Hello [giver's name]!

Thank you for generously and consistently joining [ministry name] in ministry to our community.

We will be transitioning our online giving to a new platform by [Insert Date]. Giving to our ministry will be simpler, both for you as a giver and for our church team.

To make this easy for you, we will be moving your current recurring gift schedule to our new system, so all you will need to do is update your preferred payment method.

You will be receiving an email from [Church Name] (ShelbyNext Giving) <info@shelbygiving.com> with a secure link to your account. Once you click the link you will just need to take two steps:

1) *Enter your desired password*
2) *Enter your preferred method of payment and click save***

The link in the email is time sensitive (72 hours), so be sure to update as soon as possible.

The automated giving with our previous provider will be [insert More Info as you prefer]

If you need additional assistance, please contact [Insert Contact Info]

Thanks again,

Create a Communication & Launch Plan

You will also have access to a Giving Launch Kit, stocked full of email templates, graphic inspiration, launch best practices, and more!

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Donor Import

Simplified Switching

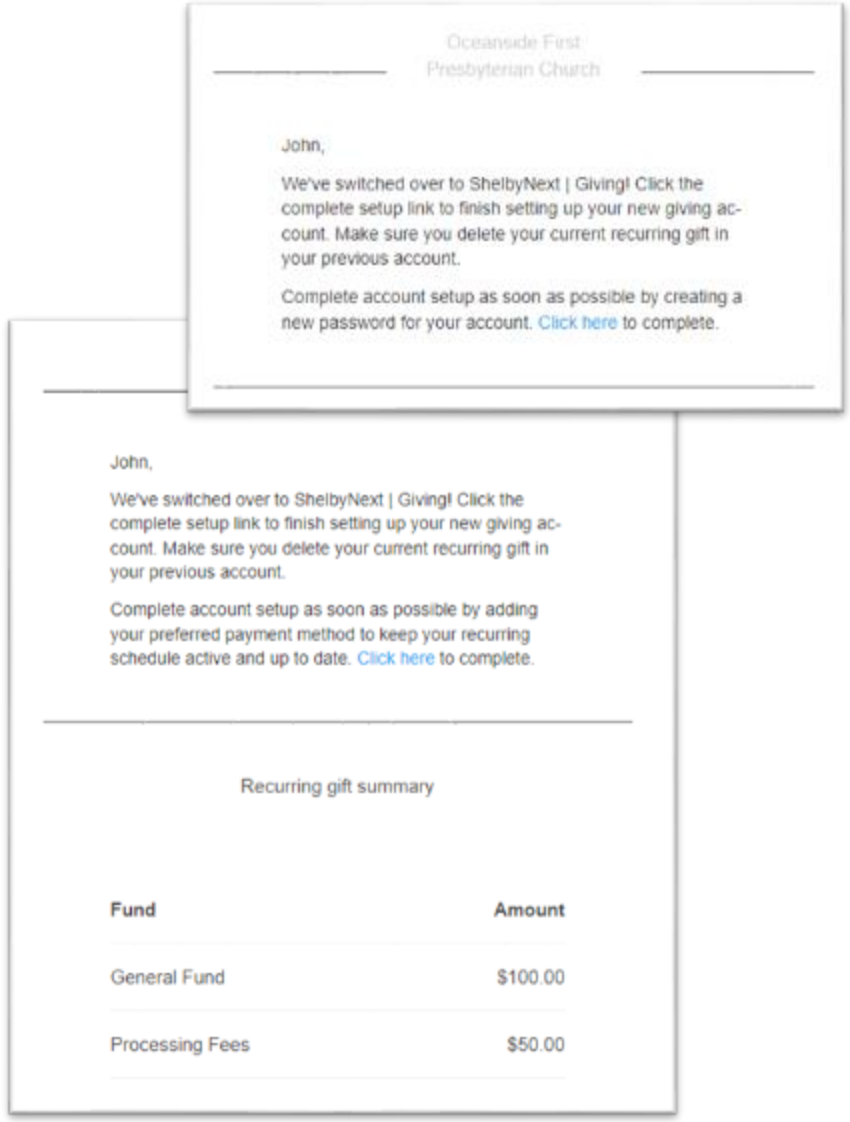
Let's work together to create a plan to communicate the switch, collect the data needed, and make it happen seamlessly for your donors

Guidance on Data Collection

Your Giving Success Coach will help you know what data you need for import. You don't have to tackle this alone!

Make the Switch & Follow Up

Do the import together to make sure everything goes as smoothly as possible. We will also help you create a next steps and follow up plan post-import for the smoothest transition.



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New & Coming Soon

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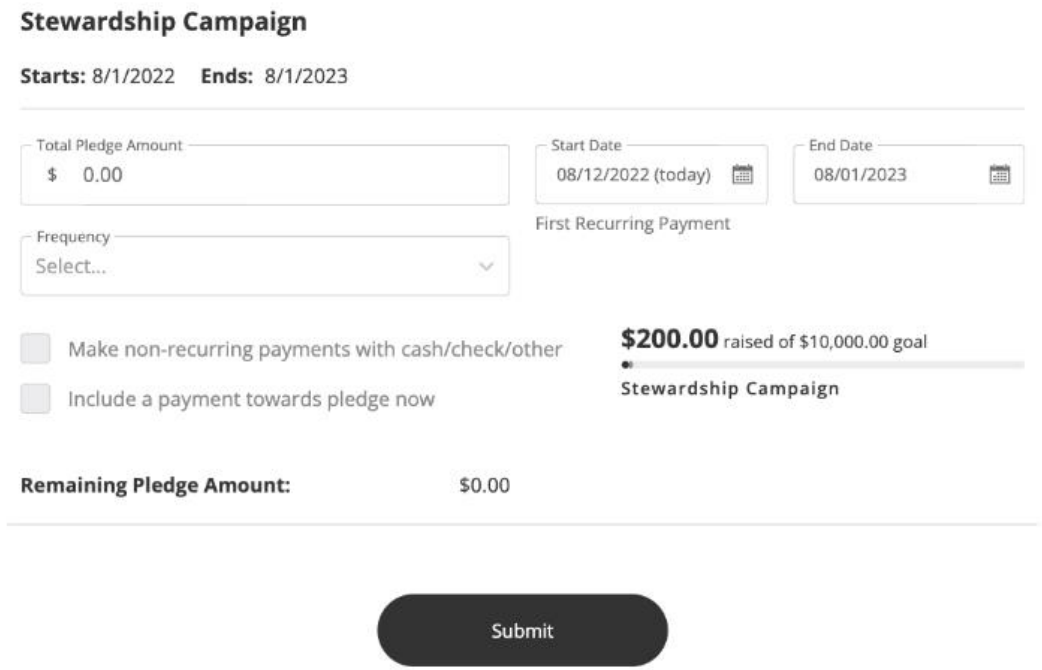
Pledge Options

Bring your Campaigns to Life

Whether your budget is built on pledging, you are entering a mutli-year building campaign or are doing a one-time pledge event, this newly added function can digitize your work and save you time!



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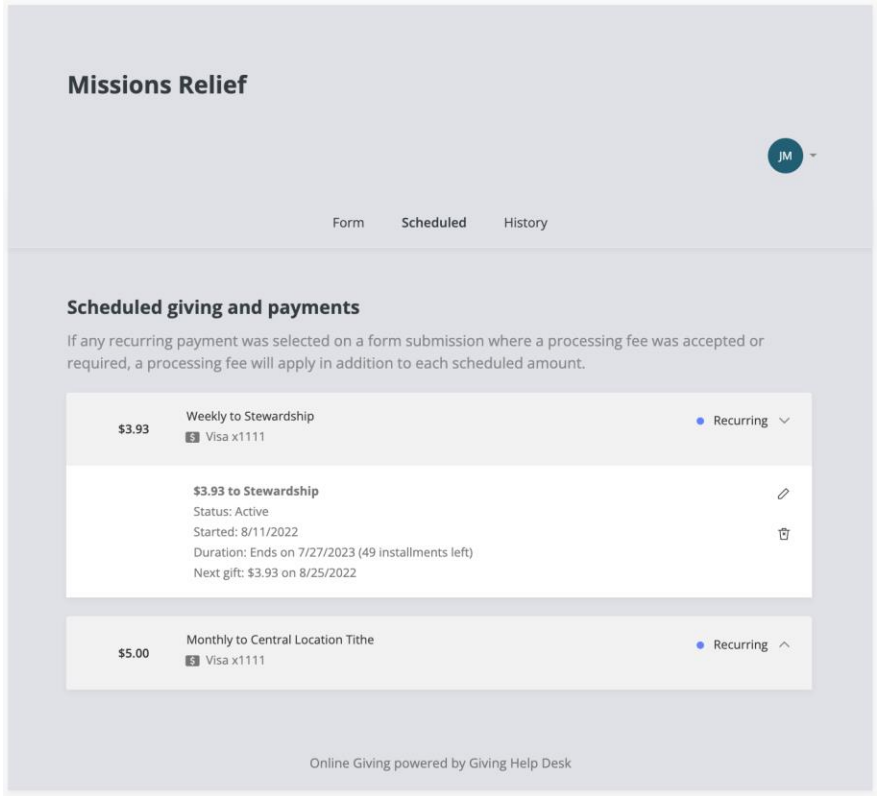
In 3 easy steps, you can create your own Pledge Campaign

1. Create a Fund for your Campaign
2. Create a Pledge Drive
3. Create a Pledge Card



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Automated Check Deposit

Coming Soon!

Want to save even more time... and your sanity? Automated Check Deposit lightens your load on manually entered tasks you complete on a weekly basis. Easily scan your paper checks into a web-based portal and sit back while they deposit into your bank account without a trip to your bank!

- Your online giving account does the heavy lifting of reporting for you – checks will appear on the Transaction Report and the Donor Record.
- Once your checks are funded, deposit reporting will be made available to reconcile with your bank statement.
- Eliminate transit of checks to and from the bank by staff or volunteers

Additional Fees Apply

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What's Next?

Glad you asked!

Webinar Recording

Yes, we did record today's session and will be sending it out via email to everyone who registered!

Talk to a Team Member Quickly

Are you ready to start now? Want to have Text Giving ready asap?

Text ONE to 313-351-4770

Emaill:
churchsuccess@ministrybrands.com

Or Scan Here

Follow-Up

Our Success Team will be touching base soon to see what questions you have and how they can assist.

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Thank you for attending!

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