

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.

# **SHELBY SYSTEMS®**

## **Advance Your Knowledge**

## **Webinar Series**

### **A Quick Look at Best Practices for Groups and Promotions**

**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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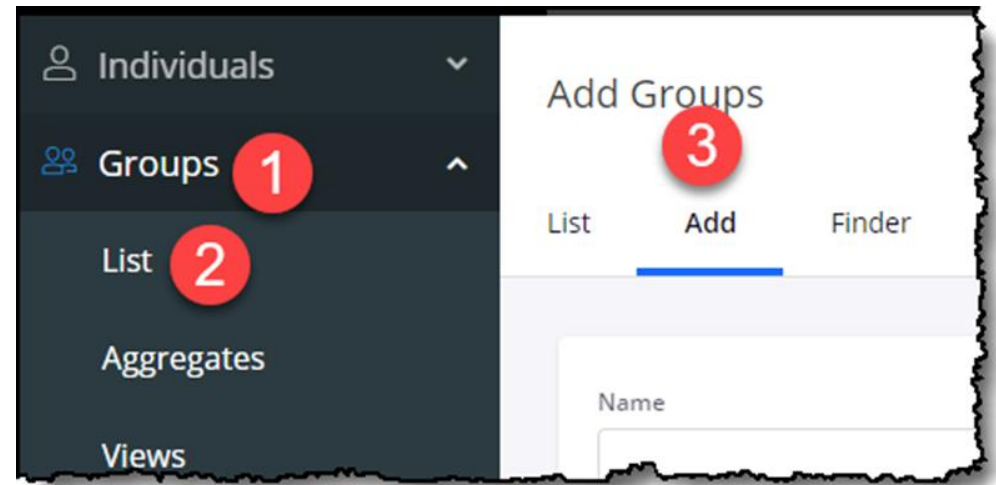


## Three Sections of Today's Webinar

- Group Basics
- Advanced Topics
- Promotions

# Building New Groups

- Groups are one of the core features of ChMS.
- There is no limit to the number of groups in your ChMS.
- There are a multitude of group level settings that impact program functions, like attendance, group finder, leader roles, and more.



# Group Management

- Because groups are unlimited, it is important to routinely maintain your groups.
- Archiving or deleting groups may be appropriate.
- An important conversation to have as a staff.
- Every group can be used for attendance taking, for mass communications, and more.
- Groups can be made “public knowledge” for the group members or kept private for internal staff use.

# Naming Conventions, Properties, & Views

- Naming conventions provide a scaffold for group builders to use to maintain consistency in the groups list.
- Using prefixes, widely understood codes, or even \* can help provide order.
- Example: Use “Sunday School” at the beginning of every Sunday School class.
- Properties are user-defined classifications for various groups that are associated with one another, i.e. Classes, Committees, Youth, Children, etc.
- Group Views allow users to predefine a selection of groups, properties, and aggregates to display.

# Naming Conventions, Properties, & Views

The screenshot displays the SHELBYSYSTEMS interface for configuring a view. The sidebar on the left contains navigation items: Individuals, Groups (1), List, Aggregates, Views (2), Mass Contact, Interactions, Giving, Attendance, Reports, Schedules, and Dashboard. The main content area is titled 'Views' and includes a 'LIST' button and an 'ADD VIEW' button (3). The 'View Settings' section contains a 'VIEW TITLE' field and 'GROUP SETTINGS' with radio buttons for 'Active Groups Only', 'Archived Groups Only', and 'Active And Archived Groups'. A 'Groups' settings panel is overlaid, featuring a gear icon (4), a 'Save' button, and a list of options: 'Group Properties', 'Group Finder', and 'Use Group Views' (checked). At the bottom, there are three sections: 'PROPERTIES' (0/23), 'AGGREGATES' (0/1), and 'GROUPS' (0/164), each with a 'Select' button.

# Naming Conventions, Properties, & Views

Search Groups...

- ▲ Name
- \*Member Status = Member
- \*Member Status = Misc. Names
- \*Member Status = Non-Resident Member
- \*Member Status = Prospect
- \*Member Status = Regular Attender
- Board of Deacons
- Board of Elders
- Children's Sunday School Teacher
- Choir - Adult
- Committee - Buildings & Grounds
- Committee - Church Council
- Committee - Church Properties

Search sun|

- ▲ Name
- Children's Sunday School Teacher
- Sunday School - Adult 60 + Singles
- Sunday School - Adult Singles 35 to 59
- Sunday School - Adult 2 Ladies Class
- Sunday School - Adult 2 Men's Class
- Sunday School - Adult 3 Ladies Class
- Sunday School - Adult 3 Men's Class
- Sunday School - Adult 4 Ladies Class
- Sunday School - Adult 4 Men's Class
- Sunday School - Adult 5 Ladies Class
- Sunday School - Adult 5 Men's Class
- Sunday School - Adult 6 Ladies



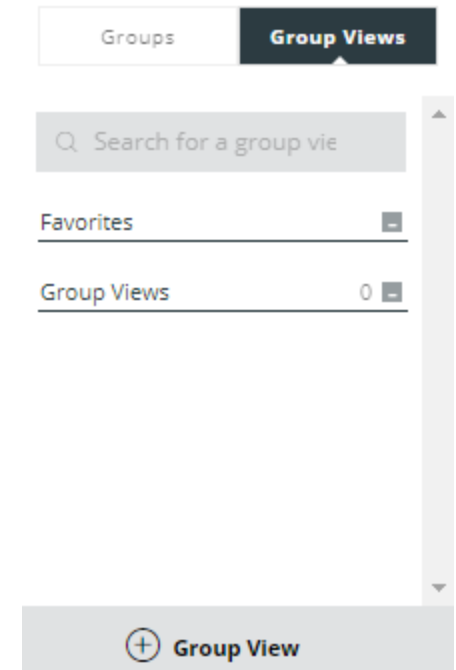
# Properties and Group Views

- Properties are tags that are placed on groups that categorize groups with shared traits.
- Both properties and categories of properties are completely customizable.
- Some examples of popular categories of properties: Age Groups, Campus, Group Type, Type of Attendance

Q Search for a property	
Age Groups	0/6 ▾
Adults	
Bed Babies	
Children	
Preschool	
Seniors	
Youth	
Campus	0/2 +
Day of the Week	0/3 +
Group Purpose	0/2 +
Roll Type	0/2 +
Type	0/8 +

# Properties and Group Views

- Group Views are shareable selections of specific Properties, Groups, and Aggregates.
  - Aggregates are a selection of groups primarily used for attendance reporting purposes.
- Group Views are very helpful for creating mailing lists of multiple groups, selections of small groups for printing attendance rolls, etc.



# Properties and Group Views

Search for a person by name

1

2

Settings

Permissions

Workflows

System Log

Export

Groups

General Terminology **3** Groups Profile

- Group Properties **4**
- Group Finder
- Use Group Views

Save

# Information Columns and Sorting

Group Information    Group Activity

Group Leader(s): None ([Edit](#))

<input type="checkbox"/>	First Name	Last Name	Email	Cell Phone	Active?
<input type="checkbox"/>	Susie	Agard			Y
<input type="checkbox"/>	Linda	Hand			Y
<input type="checkbox"/>	Bobby	Jordon			Y
<input type="checkbox"/>	Harry	Lawrence			Y
<input type="checkbox"/>	Regina	Merriwether			Y
<input type="checkbox"/>	Barbara	Mueller			Y
<input type="checkbox"/>	Debbie	Nelson			Y

Fields ▾ ...

- First Name
- Last Name
- User ID
- Gender
- Email
- Home Phone
- Work Phone
- Cell Phone
- Residential Address
- Residential City
- Residential State
- Residential Zip

# Using Groups for Communication

- Use Groups to....
  - Create labels
  - Send Emails, Texts, or Voice Message
- No complex criteria to determine who will be included. Just check the box(s).
- Need it addressed to a couple? Put both names in the group.
- To print or Export, select the Group, click on the action link (3 dots) and choose CSV to export or labels to print.

The screenshot displays the 'List' tab of the SHELBYSYSTEMS interface. At the top, there are navigation tabs for 'List', 'Add', and 'Finder'. A search bar contains the text 'new'. Below the search bar is a table with columns for 'Name', 'Leader(s)', and 'Count'. Two groups are listed: 'Newsletter - Email' with a count of 50 and 'Newsletter - Labels' with a count of 185. Both groups have a checked checkbox in the first column. A red arrow points to the checkbox for 'Newsletter - Email'. To the right of the table, a context menu is open, listing various actions. Two items are highlighted with red boxes: 'Print PDF List or Labels' and 'Send Email/Text/Voice'. The text 'Displaying 2 of 60 total Groups.' is visible at the bottom of the table area.

	Name	Leader(s)	Count
<input checked="" type="checkbox"/>	Newsletter - Email		50
<input checked="" type="checkbox"/>	Newsletter - Labels		185

Displaying 2 of 60 total Groups.

- Print Directory
- Print Attendance Roll
- Mass Archive/Activate
- Apply Properties
- Delete Selected Groups
- Assign and Email Login Information
- Print PDF List or Labels
- Export Individuals to CSV
- Mass Edit
- Add or Remove from Groups
- Send Email/Text/Voice
- Assign/Log Interaction

# Using Groups to Print a Directory

- Need a Membership or Class Directory?
- Check beside the Group(s) and choose Print Directory.
- Choose to print as Individuals or grouped in a family.
- Select options, such as Single Column, Photos, or Print Groups Separately then click Go.
- Drag fields you want to include into the left column then click Go.

The screenshot shows the 'Groups' management interface. At the top, there are tabs for 'List', 'Add', and 'Finder'. Below the tabs is a search bar labeled 'Search Groups...'. A table of groups is visible, with one group selected (checkbox checked) and a filter applied: '\*Member Status = Member'. A context menu is open over the selected group, showing options: 'Print Directory', 'Print Attendance Roll', and 'Mass Archive/Activate'. A red arrow points from the 'Print Directory' option to a configuration panel below.

The configuration panel has two columns of options:

- Left column:
  - Print Individuals
  - Print Families
- Right column:
  - Print Single Column
  - Include Profile Photo
  - Include Family Photo
  - Print Groups Separately
  - Include Inactive Group Members

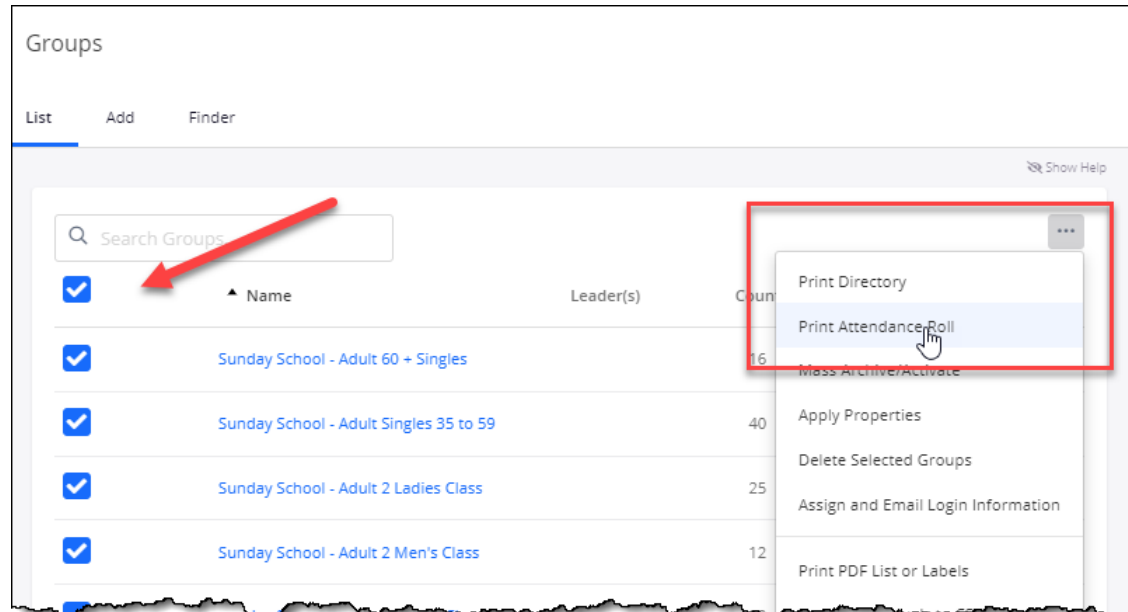
At the bottom right of the configuration panel is a blue 'Go' button. A red arrow points from the 'Go' button to a field selection panel below.

The field selection panel has a title: 'Drag fields you wish to be included into the left column.' It contains a grid of fields, each with a double-headed arrow icon:

- Name
- Gender
- Cell Phone
- Envelope Number
- Home Phone
- Work Phone
- Residential Address
- Email(s)
- Mailing Address
- Birthday
- Family Tree
- Died On
- Baptism Date

A red arrow points from the 'Home Phone' field to the 'Go' button in the configuration panel.

# Using Groups to Print Attendance Rolls



**Attendance for Sunday School - Adult 60 + Singles**

Submitted Electronically

Name	Name
_____ Burke, Lucille	_____ Newman, Louis Edward
_____ Campbell, Clara	_____ Peyton, Sally
_____ Davidson, Jean	_____ Roberts, Bob
_____ Eaves, Alma Dean	_____ Scoggins, James B
_____ Franken, Timothy	_____ Smith, Norman A
_____ Gould, Winnie Z	_____ Temple, Marsha
_____ Gunn, Aims	_____ Warren, Sherry
_____ Mastroni, Frank	_____ Yokum, Price

**Visitors:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Total Members Present:** \_\_\_\_\_

**Total Visitors Present:** \_\_\_\_\_

**Total Present:** \_\_\_\_\_

- Search form your Group(s) using either the Search, Group View or Properties, as explained earlier.
- Check beside the Group(s) and choose Print Attendance Roll
- Enter the Date for when the attendance should be taken.
- Number of Visitor Lines?
- Include Last Day Attended?
- Click Go.

# Using Groups to Assign or Log Interaction

< Groups List

Individuals in \*Member Status = Prospect

Group Information    Group Activity

Group Leader(s): None (Edit)

	First Name	Last Name
<input type="checkbox"/>	Brenda	Baker
<input checked="" type="checkbox"/>	Robert Michael	Ball
<input checked="" type="checkbox"/>	Grover	Cleveland
<input checked="" type="checkbox"/>	Frances	Cleveland
<input type="checkbox"/>	Jake	Dente
<input type="checkbox"/>	Blake	Edwards
<input type="checkbox"/>	Dwight D	Eisenhower

Fields ▾ ...

- Filter
- Last Interaction Report
- Edit Group
- Add Individuals to this Group
- Activate
- Inactivate
- Add to Group
- Mass Edit
- Send Email/Text/Voice
- Assign/Log Interaction

Group Leader(s): None (Edit)    Fields ▾ ...

Take action on

These Individuals ▾

Assign Interactions     Log Interactions

Interaction Type \* ▾ First Time Visitor

Completed By \* Julie Adams

Date Completed \*

Summary \*  
Dropped off welcome baskets for first time guests.

\* Required Field

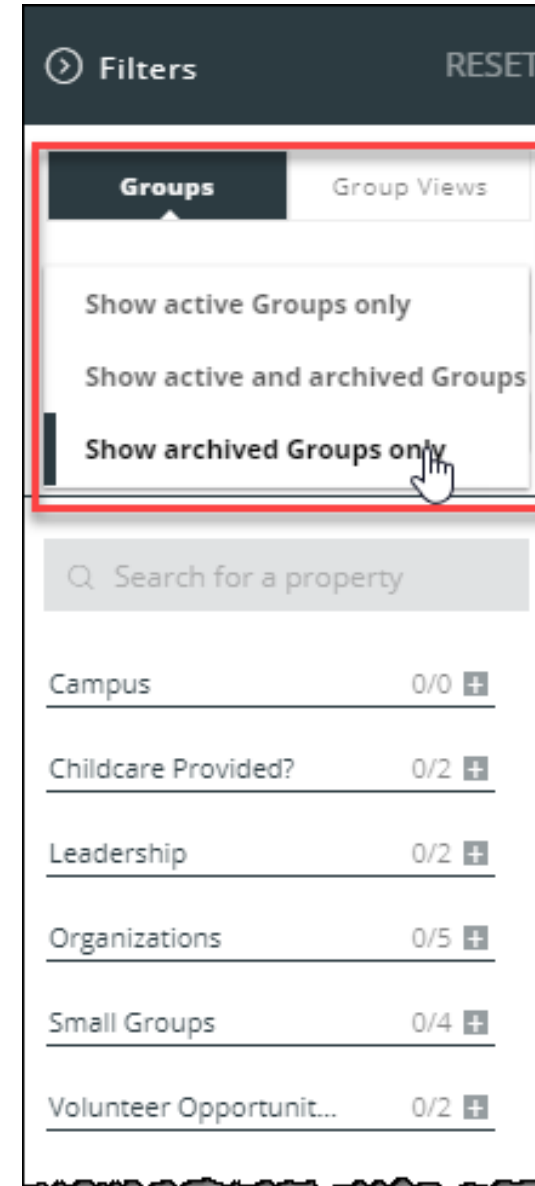
Log Interactions

- Select everyone in or select individuals within a Group. Ex. Prospects and click Assign/Log Interactions.
- Assign (future contact request) or Log (recording past contact).
- Choose Interaction Type (ex. First Time Visitor), Assigned or Completed by, Dates, and Instructions or Summary.
- Click Log Interactions.



# Archiving Groups

- Old Group history you want to keep but do not want to always see in the Group list?
- Archive Groups so they're not in the active list but still accessible.
- Makes your active Group list more manageable.
- Still use Archived Groups in email, labels, reporting, etc.



# Archiving a Group using Mass Archive/Activate

- Select the Groups to Archive.
- From the Action menu choose Mass Archive/Activate.
- Click the Archive Groups.
- Click Go.

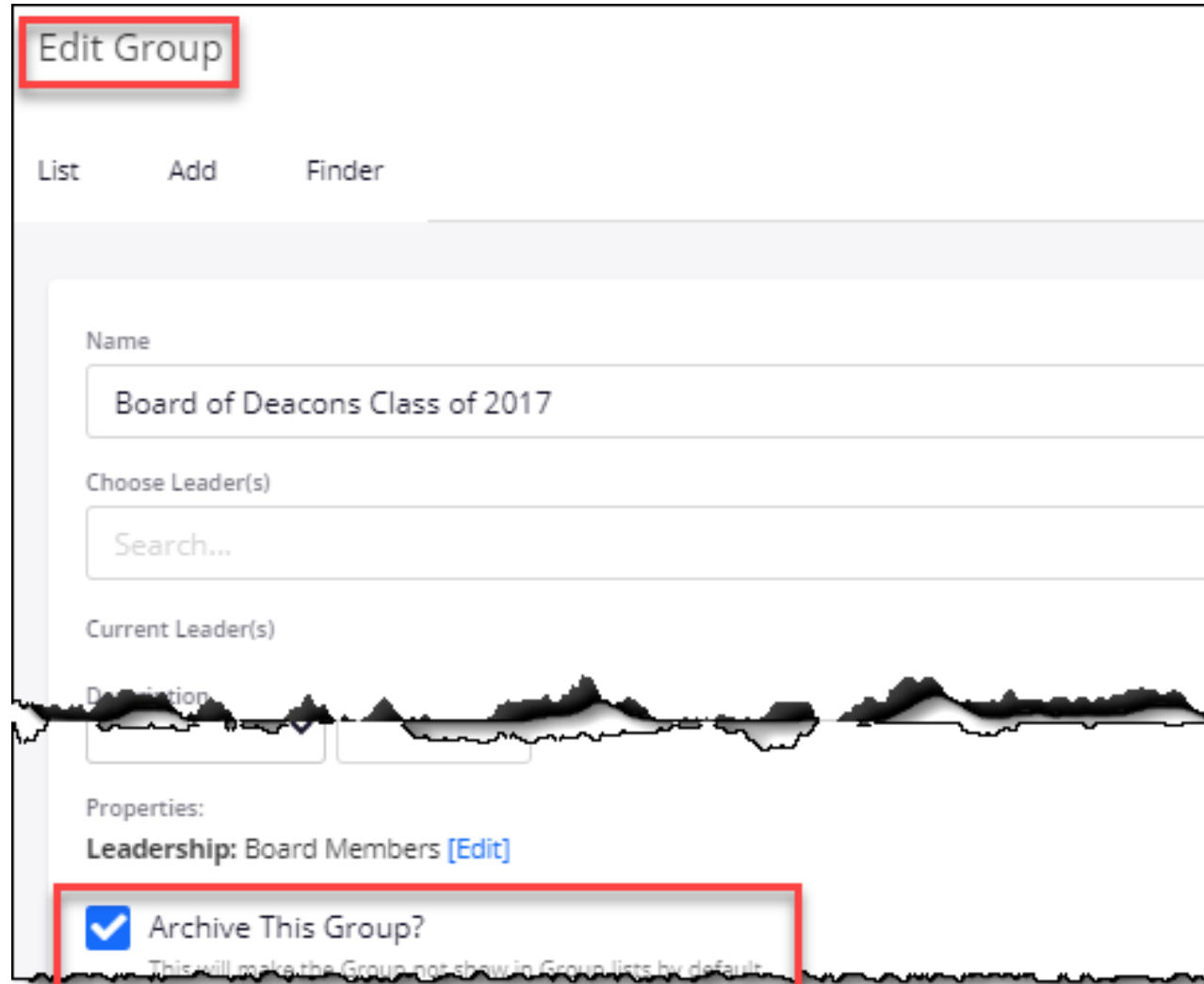
The screenshot displays the 'Groups' management interface. At the top, there are tabs for 'List', 'Add', and 'Finder'. Below the tabs, there are two radio buttons: 'Archive Groups' (selected) and 'Activate Groups'. A search bar contains the text 'deacons'. Below the search bar is a table with columns for 'Name', 'Leader(s)', and 'Count'. Two rows are visible, both with a checked checkbox in the left margin:

	Name	Leader(s)	Count
<input checked="" type="checkbox"/>	Board of Deacons Class of 2017		3
<input checked="" type="checkbox"/>	Board of Deacons Class of 2018		3

An action menu is open on the right side of the table, listing various options. The 'Mass Archive/Activate' option is highlighted by a mouse cursor.

# Archiving a Group through Group Edit

- Edit within the Group.
- Check Archive This Group? Box.
- Click Save.



**Edit Group**

List Add Finder

Name  
Board of Deacons Class of 2017

Choose Leader(s)  
Search...

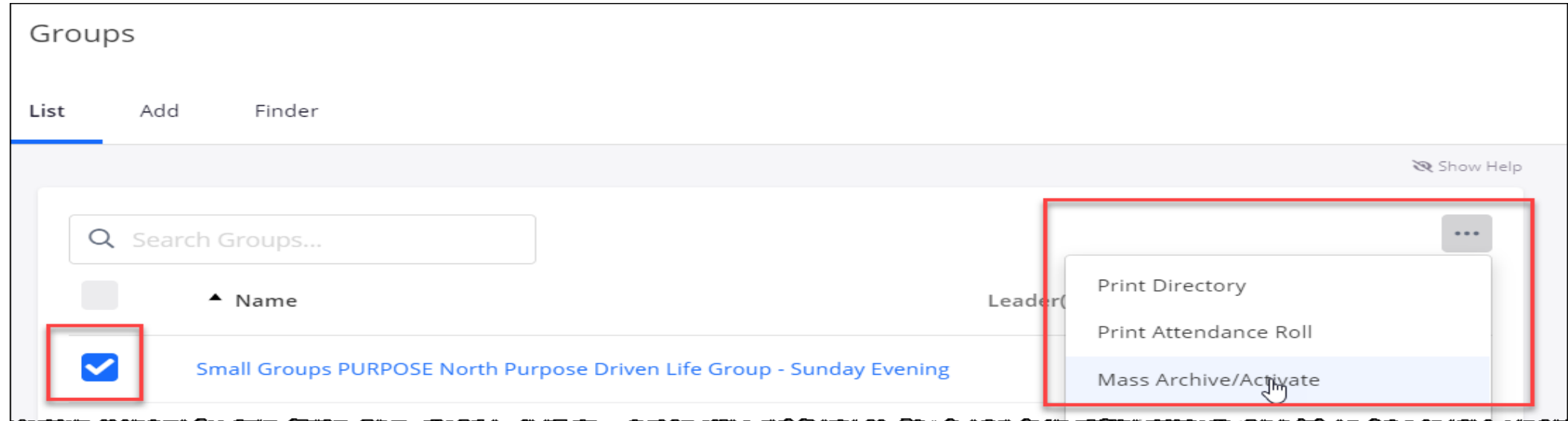
Current Leader(s)

Description

Properties:  
**Leadership:** Board Members [\[Edit\]](#)

Archive This Group?  
This will make the Group not show in Group lists by default.

# Re-Activating Groups



- Archiving a Group isn't permanent.
- To reactivate select the Group(s).
- Click on the Action button and Choose Mass Archive/Activate, then Go.

# In-Activating Group Members

The screenshot illustrates the process of inactivating a group member in the SHELBYSYSTEMS interface. It is divided into two panels by a torn paper effect.

**Left Panel (Group Information):** Shows a list of individuals in the 'Sunday School - Adult 2 Men's Class' group. The 'Group Leader(s)' is listed as 'None (Edit)'. A table lists members with checkboxes, first names, and last names. 'Harvey Ingram' is selected, and the 'Inactivate' option is highlighted in the context menu.

First Name	Last Name
Allen	Adams
Russell	Blackwell
Henry	Carol
Lee	Chang
Harvey	Ingram
Floyd	Knibbs

**Right Panel (Group Information):** Shows the 'Inactivate' dialog box. It includes a 'Set Inactive Date' field with the date '07/08/2021' and an 'Inactivate' button.

- There are times when you want to keep a Group member in the Group, but not shown as Active. For example, they were in an Adult Sunday School class, but have not been attending for some time.
- Choose the individual(s) you want to Inactivate in the Group by selecting their name(s). Click on the action button, choose Inactivate, and then click Inactivate. You have the option to change the date of when a person is activated.

## What happens when you deactivate a Group Member?

- It does not remove them from the database!
- No longer receive Mass Contacts (email, text, voice).
- No longer appears when taking attendance.
- No longer visible unless filtered by inactive individuals.
- Only inactivates them in that specific Group. Doesn't affect other groups or functions.
- Click the action button, select Filter, Check Show Inactive Individuals, then click Filter to show Inactive Individuals.

The screenshot shows the 'Groups List' interface for 'Individuals in Sunday School - Adult 2 Men's Clas'. It includes a 'Group Information' section with 'Group Leader(s): None (Edit)'. Below is the 'Active/Inactive Group Individuals' section with three radio buttons: 'Show Active Individuals', 'Show Inactive Individuals', and 'Show All Individuals'. The 'Show All Individuals' option is selected and highlighted with a red box. A table below lists group members with columns for First Name, Last Name, Group Last Attended Date, Active?, and Join Date. The 'Active?' column for Harvey Ingram is highlighted with a red box and contains the value 'N'. A red arrow points to the 'Fields' menu icon in the top right, which is open, showing a 'Filter' option also highlighted with a red box.

First Name	Last Name	Group Last Attended Date	Active?	Join Date
Harvey	Ingram	12/09/2018	N	08/28/2016
Kyle	Zelder	03/07/2021	Y	08/28/2016

# Re-Activating Group Members

Sometimes individuals will rejoin a Group..

- Click on Filters, Inactive Individuals. Select Individual(s) and Choose Activate in the menu.



The screenshot shows a web interface for managing a group. At the top, there is a breadcrumb trail: < Groups List. Below that, the group name is 'Individuals in Sunday School - Adult 2 Men's Class'. There are two tabs: 'Group Information' and 'Group Activity'. Under 'Group Information', it says 'Group Leader(s): None (Edit)'. Below that, there are three radio buttons for 'Active/Inactive Group Individuals': 'Show Active Individuals' (unselected), 'Show Inactive Individuals' (selected), and 'Show All Individuals' (unselected). At the bottom, there is a table with columns: First Name, Last Name, Group Last Attended Date, Active?, and Join Date. The table contains one row for 'Harvey Ingram' with a 'Group Last Attended Date' of '12/09/2018', 'Active?' status of 'N', and 'Join Date' of '08/28/2016'. A dropdown menu is open over the table, showing options: Filter, Last Interaction Report, Edit Group, Add Individuals to this Group, Activate (highlighted with a mouse cursor), Inactivate, Add to Group, and Move to Group.

	First Name	Last Name	Group Last Attended Date	Active?	Join Date
	Harvey	Ingram	12/09/2018	N	08/28/2016

# Group Join Dates with Workflows

The Join date is used with Workflows to automate the Group Duration trigger ...

- Use an Interaction to follow-up with a first-time visitor.
- Send an email or notification someone has been in the visitor group for 51 weeks. *(Good possibility this person needs to be removed.)*

The image shows a screenshot of a workflow configuration interface for a group named "Group — Membership Duration". The interface is divided into two panels, each showing a configuration step for matching individuals based on their membership status and duration.

**Left Panel:** The title is "Group — Membership Duration". Below the title, it says "Individual has been in \*Member Status = Prospect for 2 weeks". A red box highlights a configuration step titled "Match a Individual who has been in" with a dropdown menu set to "\*Member Status = Prospect x" and a "For" field set to "2 weeks".

**Right Panel:** The title is "Group — Membership Duration". Below the title, it says "Individual has been in \*Member Status = Prospect for 51 weeks". A red box highlights a configuration step titled "Match a Individual who has been in" with a dropdown menu set to "\*Member Status = Prospect x" and a "For" field set to "51 weeks".



# Workflows to add or remove to/from Groups

The screenshot displays a workflow configuration window. At the top, the 'Name' field is 'Add Prospects to Worship Group' and the 'Description' is 'When an individual is added to the Group Prospects also add them to the Group Worship'. A checkbox for 'Active' is checked. Below this, a preview pane shows a group interface with a green notification: 'Individual is added to \*Member Status = Prospect'. The 'Match a Individual who is' section includes a dropdown menu set to 'Added to' and a tag '\*Member Status = Prospect'. On the right, the 'Add the person to' dropdown is set to 'Worship Attendance'.

- Add someone to the Visitor or Prospect Group and the Workflow automatically adds them to other Groups, such as Worship Attendance, Newsletter, etc.

# How to use Leader Roles with Groups

- Allow Group Leaders to see phone numbers, email, etc.
- Take attendance using the ShelbyNext Membership App.
- Start with Permissions and assign the rights to the Group Leaders. You must also assign which groups fall under these rights.
- Assign the Group Leader(s) to the Group.
- Provide Group Leaders with their username and password along with how to access the ShelbyNext Membership app.

Edit Leader Role

Global Roles **Leader Roles**

Role Name  
Group Leaders

Check the boxes below next to the permissions you would like to give this role.

GROUP-ASSO

Attendance  
 Add/Edit

Background Checks [Select all](#)  
 Order  
 View  
 Delete

Documents [Select all](#)  
 View  
 Add/Edit

Groups [Select all](#)  
 Edit Details  
 Edit Memberships

Group Views [Select all](#)  
 View  
 Add/Edit  
 Share  
 Manage

Individuals [Select all](#)  
 View  
 Add/Edit  
 Import  
 Propose Edit  
 Delete  
 Merge

Notes [Select all](#)  
 View  
 Add/Edit

Pictures  
 Add/Edit

Reports [Select all](#)  
 View Attendance  
 View Membership  
 View Giving  
 View Summary Giving

Utilities [Select all](#)  
 Mass Email  
 Mass Sms  
 Mass Voice

The Leaders of the following groups can use these permissions in their groups.

Groups

Board of Deacons
  Board of Elders
  Choir - Adult
  Small Groups - Financial Peace University
  Small Groups - Power Tools
  Sunday School - Adult 80+ Singles
  Sunday School - Adult Singles 35 to 59
  Sunday School - Adult 2 Ladies Class
  Sunday School - Adult 2 Men's Class
  Sunday School - Adult 3 Ladies Class
  Sunday School - Adult 3 Men's Class
  Sunday School - Adult 4 Ladies Class
  Sunday School - Adult 5 Ladies Class
  Sunday School - Adult 5 Men's Class
  Sunday School - Adult 6 Ladies
  Sunday School - Adult 4 Men's Class
  Sunday School - Adult 6 Men's Class
  Sunday School - Adult 7 Ladies Class
  Sunday School - Adult 7 Men's Class
  Sunday School - Adult College & Career Class
  Sunday School - Adult Widow's Class

Save Cancel Delete

# Online Directory

- The Online Directory uses only one Group to contain those who are in the online directory.
- Suggest you Create a unique Group since not everyone who is a member, for example, wants to be in the directory. There are those who aren't members who should be in the directory such as church staff, teachers, etc.
- For the Group Settings, just provide a Name (ex. Online Directory) and check the box "Allow Individuals to Know They're Members".
- In Permissions, Enable the Directory, Choose the Directory Group, and what fields will be Visible to All people in the Directory.
- Visible in the free MinistryOne and ShelbyNext Membership apps.
- Profile Visibility on the Person's page to hide information they don't Groups Leaders or Members to see.

Name

Online Church Directory

Allow Individuals To Know They're Members  
Check if you wish for members to know they are in this Group.

Enable Directory?  
Yes ▾

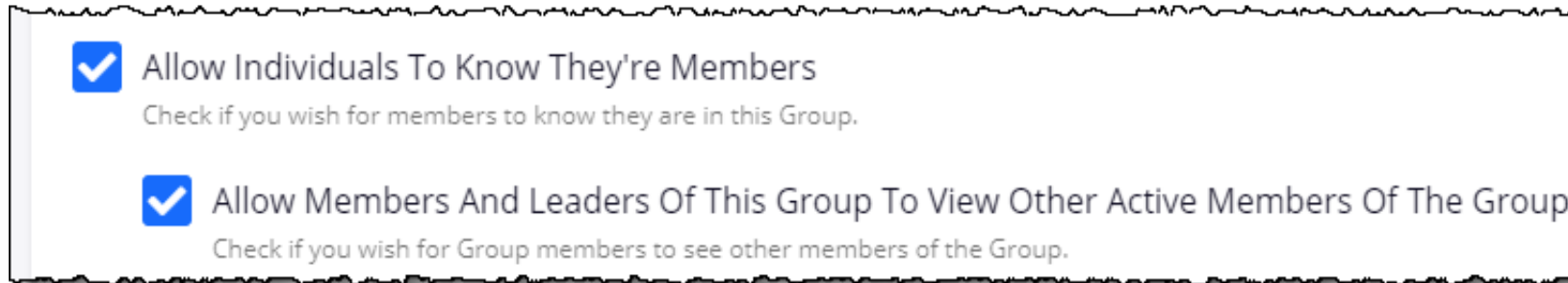
Directory Group  
Online Church Directory ▾

Visible Fields for Directory Viewers

Email Address  
 Address  
 Home Phone  
 Cell Phone  
 Profile Photo  
 Birthday  
 Age  
 Family Tree

Save

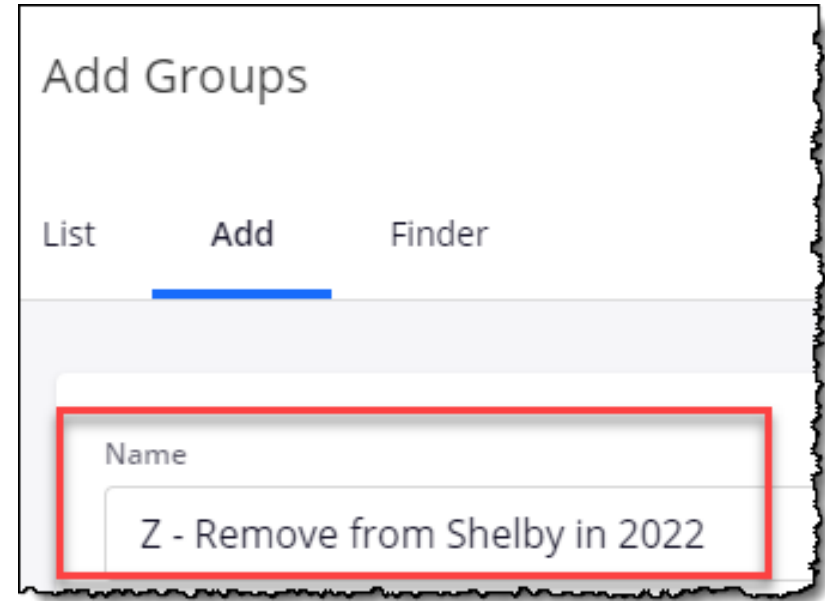
# Group as a Class Directory



- Small Groups, Committees, Leadership may want the phone numbers, email or mailing addresses of those in their groups.
- This information, *when activated*, is visible to the Group members.
- There is an option on the members page, Profile Visibility, that can hide information the individuals don't want shown in the Group or Online Directory.
- No confidential information such as interactions, notes, or giving is visible. Just demographic information.
- Profile Visibility on the Person's page to hide information they don't Groups Leaders or Members to see.
- Click on Edit Group and check the boxes "Allow Individuals to Know They're Members" and "Allow Members and Leaders of This Group to View Other Active Members of The Group".

# Temporary or Maintenance Groups

- Sometimes you just need a Group for a Short-term project such as a mailing for an event.
- Or you need a Group to contain those who need to be Removed from Shelby following annual statements or conference reports being completed.
- Create names that keep these groups out of the way of your everyday ministry. You can use a prefix for the Group such as Z. Ex. "Z – Remove from Shelby in 2022" or "Z – Charge Conference Review."
- You can also use a person's initials or the Group Leader role to show who is responsible for the Group.



The screenshot shows a web interface titled "Add Groups". Below the title are three tabs: "List", "Add", and "Finder". The "Add" tab is currently selected, indicated by a blue underline. Below the tabs is a form with a single text input field. The field is labeled "Name" and contains the text "Z - Remove from Shelby in 2022". The entire form area is highlighted with a red border.

# Using a Group to Remove people from Shelby

- An Admin inherits the right to remove people from Shelby within a Group.
- If you need to give this right to an individual who is not an admin, they will need the permission to Delete Individuals.
- To remove one or more individuals from the ShelbyNext database...
  - Click on the Group name.
  - Select those who are to be removed.
  - Click the action button and choose Delete Individuals From System at the bottom of the menu. *Only those with permissions will see this option.*
  - The following message will appear. Click OK.
  - Click the red Delete button.

The screenshot shows two parts of the ShelbyNext interface. On the left, a 'Individuals' list is shown with a 'Select all' link. The list includes checkboxes for 'View', 'Add/Edit', 'Import', 'Propose Edit', 'Delete', and 'Merge'. The 'Delete' and 'Merge' options are checked. On the right, a 'Fields' dropdown menu is open, showing options like 'Filter', 'Last Interaction Report', 'Edit Group', 'Assign/Log Interaction', and 'Delete Individuals From System'. The 'Delete Individuals From System' option is highlighted with a red box. Below the menu, a message box states: 'This will remove the selected people and all of their information from the system. Their giving will be marked as anonymous. There is NO undo.' An 'OK' button is visible at the bottom right of the message box.

Individuals [Select all](#)

- View
- Add/Edit
- Import
- Propose Edit
- Delete
- Merge

Fields ▾ ...

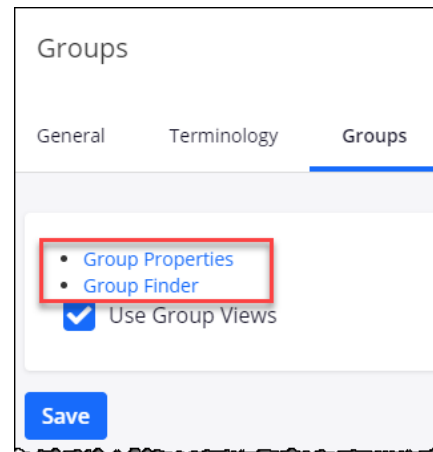
- Filter
- Last Interaction Report
- Edit Group
- Assign/Log Interaction
- Delete Individuals From System**

This will remove the selected people and all of their information from the system. Their giving will be marked as anonymous. There is NO undo.

OK

# Group Finder Settings

- Group Finder helps your members and attenders "find" groups they would like to join.
- It uses Group Properties to determine which Groups will appear in Group Finder.
- Notice there is an Embed code that will allow access to Group Finder from your website.
- Group Finder also works in the MinistryOne app.



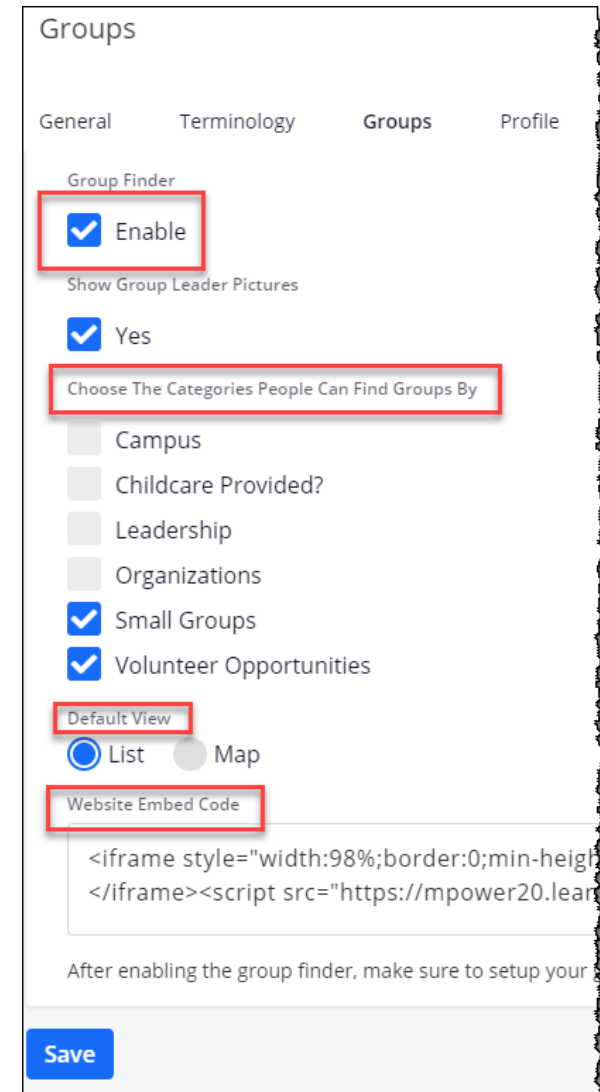
Groups

General Terminology **Groups** Profile

- [Group Properties](#)
- [Group Finder](#)

Use Group Views

Save



Groups

General Terminology **Groups** Profile

Group Finder

Enable

Show Group Leader Pictures

Yes

Choose The Categories People Can Find Groups By

- Campus
- Childcare Provided?
- Leadership
- Organizations
- Small Groups
- Volunteer Opportunities

Default View

List  Map

Website Embed Code

```
<iframe style="width:98%;border:0;min-height:100px;" src="https://mpower20.learncenter.com/group-finder" /></iframe><script src="https://mpower20.learncenter.com/group-finder" /></script>
```

After enabling the group finder, make sure to setup your

Save

# Group Finder Properties Setup

**Childcare Provided?**

No  Yes

Add Property  Save Edit

**Small Groups**

Men's  Seniors  Women's  Young Couples (18 to 29)  Youth

Add Property  Save Edit

**Volunteer Opportunities**

Children's Ministry  Youth

- Create the Properties you will want to use with Group Finder.
- Suggestions would be Properties for the type of Group, Age Groups, Childcare Provided?, etc.



# Group Finder Group Setup



The screenshot shows a web interface for setting up a group. It features a text input field for the group name, a section for choosing leaders with a search bar, and a list of current leaders.

Name

Small Groups - Power Tools

Choose Leader(s)

\*\*Leader Role permissions are set up for leaders of this Group

Search...

Current Leader(s)

Billy Adams

- Add your Group and assign the Group Leader(s).
- The Group Leaders will be notified by email to either accept/deny an individual who wants to join or that an individual has joined, depending on the settings.

# Group Finder Group Setup

- Enter the Group Description. This is what potential Group members will see to know if this is a good fit for them.
- Address where the Group meets.
- Meeting Day and Time.
- Group Properties

Description

**B I** | | | | | Format - | Source

It's imperative to have the tools of prayer (1 John 5:14), daily input from God (Matthew 6:11) and accountability (1 John 4:4-5) to live victoriously.

Men's weekly bible study.

Meet at Jake's Coffee Shop on Main St. at 6:30 a.m. every Tuesday.

Good food and fellowship while studying the Word of God.

Address

Jake's Coffee Shop  
123 Main St.

City

Cordova

Used on the Group finder

State

TN

Zip Code

38016

Meeting Day

Tuesday

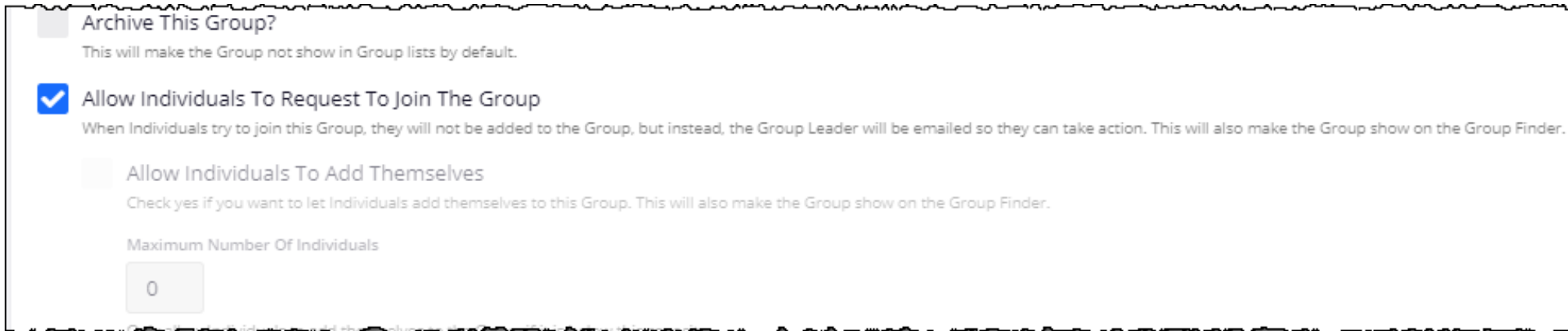
Time

6:30 AM

Properties:

Organizations: Small Groups; Small Groups: Men's [\[Edit\]](#)

# Group Finder Group Setup



Archive This Group?  
This will make the Group not show in Group lists by default.

Allow Individuals To Request To Join The Group  
When Individuals try to join this Group, they will not be added to the Group, but instead, the Group Leader will be emailed so they can take action. This will also make the Group show on the Group Finder.

Allow Individuals To Add Themselves  
Check yes if you want to let Individuals add themselves to this Group. This will also make the Group show on the Group Finder.

Maximum Number Of Individuals

0

- Check the box either to Allow Individuals to Request to Join the Group OR Allow individuals to Add Themselves.
- Note there is a Maximum Number of Individuals option if you allow people to add themselves.

# Group Finder Results

Find A Group

Any Organizations

Any Volunteer Opportunities

Any Meeting Time




Any Small Groups

Any Meeting Day

Find Groups Close To You

Enter your full address

View Map

Group	Details
<p>Children's Sunday School Teacher</p> <p>What is expected of a children's ss teacher...</p>	<p><b>Day:</b> Sunday</p> <p><b>Time:</b></p> <p><b>Volunteer Opportunities:</b> Children's Ministry</p> <p><b>Join</b></p>
<p>Small Groups - Financial Peace University</p> <p><b>Financial Peace University</b> (by Dave Ramsey)</p> <p><i>Learn how to make your money work for you!</i></p> <p>Thursday Classes at 7pm (January 28th - March 25th)</p> <p>Enrollment: \$110 per household</p> <p><b>Meets At</b> <a href="#">7345 Goodlett Farms Pkwy. Cordova, TN 38016</a></p>	<p><b>Leader(s):</b></p> <p> George Adams</p> <p> Juliet Adams</p> <p><b>Day:</b> Thursday</p> <p><b>Time:</b> 7:00 PM</p> <p><b>Organizations:</b> Small Groups</p> <p><b>Small Groups:</b> Young Couples (18 to 29)</p> <p><b>Join</b></p>
<p>Small Groups - Power Tools</p> <p>It's imperative to have the tools of prayer (1 John 5:14), daily input from God (Matthew 6:11) and accountability (1 John 4:4-5) to live victoriously.</p> <p>Men's weekly bible study.</p> <p>Meet at Jake's Coffee Shop on Main St. at 6:30 a.m. every Tuesday.</p> <p>Good food and fellowship while studying the Word of God.</p> <p><b>Meets At</b> <a href="#">Jake's Coffee Shop 123 Main St. Cordova, TN 38016</a></p>	<p><b>Leader(s):</b></p> <p> Billy Adams</p> <p><b>Day:</b> Tuesday</p> <p><b>Time:</b> 6:30 AM</p> <p><b>Organizations:</b> Small Groups</p> <p><b>Small Groups:</b> Men's</p> <p><b>Join</b></p>

# Using Field List with Groups

- Useful to see email, phone numbers on individuals.
- Use for promotions based on birthdate or age.
- Click Fields and check the boxes of the fields you want to see on the screen.

Individuals in Sunday School - Preschool - Nurse Bed Babies Class

Group Information

Group Activity

Group Leader(s): None ([Edit](#))

	First Name	Last Name	Birth Date	Age	Active?
<input type="checkbox"/>	Howard	Anderson	10/20/2018	2 yrs	Y
<input type="checkbox"/>	Joey	Ford	04/19/2017	4 yrs	Y
<input type="checkbox"/>	Juanita	Gutierrez	12/27/2016	4 yrs	Y
<input type="checkbox"/>	Natalie	Jacobs	04/11/2017	4 yrs	Y
<input type="checkbox"/>	Jimmy	Jones III	04/14/2017	4 yrs	Y
<input type="checkbox"/>	Andrew	Knibbs	01/16/2017	4 yrs	Y
<input type="checkbox"/>	Brittany	Knibbs	05/09/2017	4 yrs	Y
<input type="checkbox"/>	Cedrick	Laporte Jr.	05/23/2017	4 yrs	Y
<input type="checkbox"/>	Raymond	Togo	05/14/2017	4 yrs	Y

Fields ▾ ...

- Residential Country
- Mailing Address
- Mailing City
- Mailing State
- Mailing Zip Code
- Mailing Country
- Birth Date
- Age
- Family Relationship
- Check-In Note
- Baptism Date
- Died On

# Deleting Groups and the Consequences

- Any attendance history associated with a Group that is deleted will be lost.
- Group Join dates will be lost.
- The Group is removed from all records, Views, Queries, Filters, that referenced the Group.
- People will NOT be removed when the Group is deleted.

# When not to use Groups

- Don't use Groups to store important dates such as....
  - Birthdates, Join the Church, When someone died, etc.
  - Instead, use a Configurable Date Field.
    - Birthdate, Date Died, and Baptism Dates are already setup.
- Use Groups **ONLY** as a filter for "omitting" someone from lists, saved searches, etc.
- Parent Groups are **NOT** necessary for Mass Contact

# Promotions

Grade Level	"From" Group Name	"To" Group Name	✓
12			
11			
10			
9			
8			
7			
6			
5			
4			
3			
2			
1			
K			
Pre-K			
Toddlers			
Nursery			

Move Group Members To

Move Group Members To

## Promotion Checklist

<input checked="" type="checkbox"/>	Barb	Anderson
<input checked="" type="checkbox"/>	Linda	Hand
<input checked="" type="checkbox"/>	Tommy	Jones
<input checked="" type="checkbox"/>	Leslie	Lamar

Room 54

1

2

Fields ▾

- Filter
- Last Interaction Report
- Edit Group
- Add Individuals to this Group
- Activate
- Inactivate
- Add to Group
- Move to Group 3
- Remove from Group



# Naming Conventions for School Age Groups, Committees, etc.

- Traditional Sunday School Class Names
  - SS 3<sup>rd</sup> Grade Boys, Youth - 9<sup>th</sup> and 10<sup>th</sup> Grade, Nursery - 2 and 3 Year Olds
- Alternatives
  - SS Class of 2030 - Boys, Youth – All High School, Nursery – Born 2018 and 2019
- Traditional Committee Names
  - Vestry Members, Board Members, etc.
- Alternative
  - Board 19-20, Board 20-21, Board 21-22, Board 22-23

# Where can I watch this video again?

**Watch or Register to attend  
Webinars**

@ [Community.Shelbysystems.com](https://Community.Shelbysystems.com)

Advance Your Knowledge Webinar Series

Register for an Upcoming Webinar

Title	Date	
Reconciling Online Giving, From Entry to Bank Reconciliation	03/24/2021 2:00 PM (Central Time)	<a href="#">Register NOW</a>

Watch a Previous Webinar

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

# Next “Advance Your Knowledge” Webinar

- Topic: Purpose Driven Forms – Part 1 (Getting Ready for Fall)
- Date: August 11, 2021
- Time: 3pm E/2pm C/12pm P
- Led by: Mark Crain and Staci Sampson
  
- We will look at using some of the powerful tools in the Forms Management System to create Forms needed for lining up volunteers, setting up classes, or allowing members to send in information for a new pledge. Join us as we unlock some of the ways you can collect and import information from members as you involve them in the ministry of the church.

# Virtual Workshops are here!

- Enrollment is now open for August 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](mailto:Training@shelbyinc.com)

[Download the Promotions Checklist](#)

[Community.ShelbySystems.com](http://Community.ShelbySystems.com)

[Virtual Training](#)