

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. The text is overlaid on this background.

SHELBY SYSTEMS®

Advance Your Knowledge

Webinar Series

Database Cleanup and Fixing Mistakes in ChMS

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

Carmen Dea
ShelbyNext Trainer



Staci Sampson
ShelbyNext Trainer



What we'll
talk about

People

Groups

Giving

People

Merging

Workflows

Deleting Records

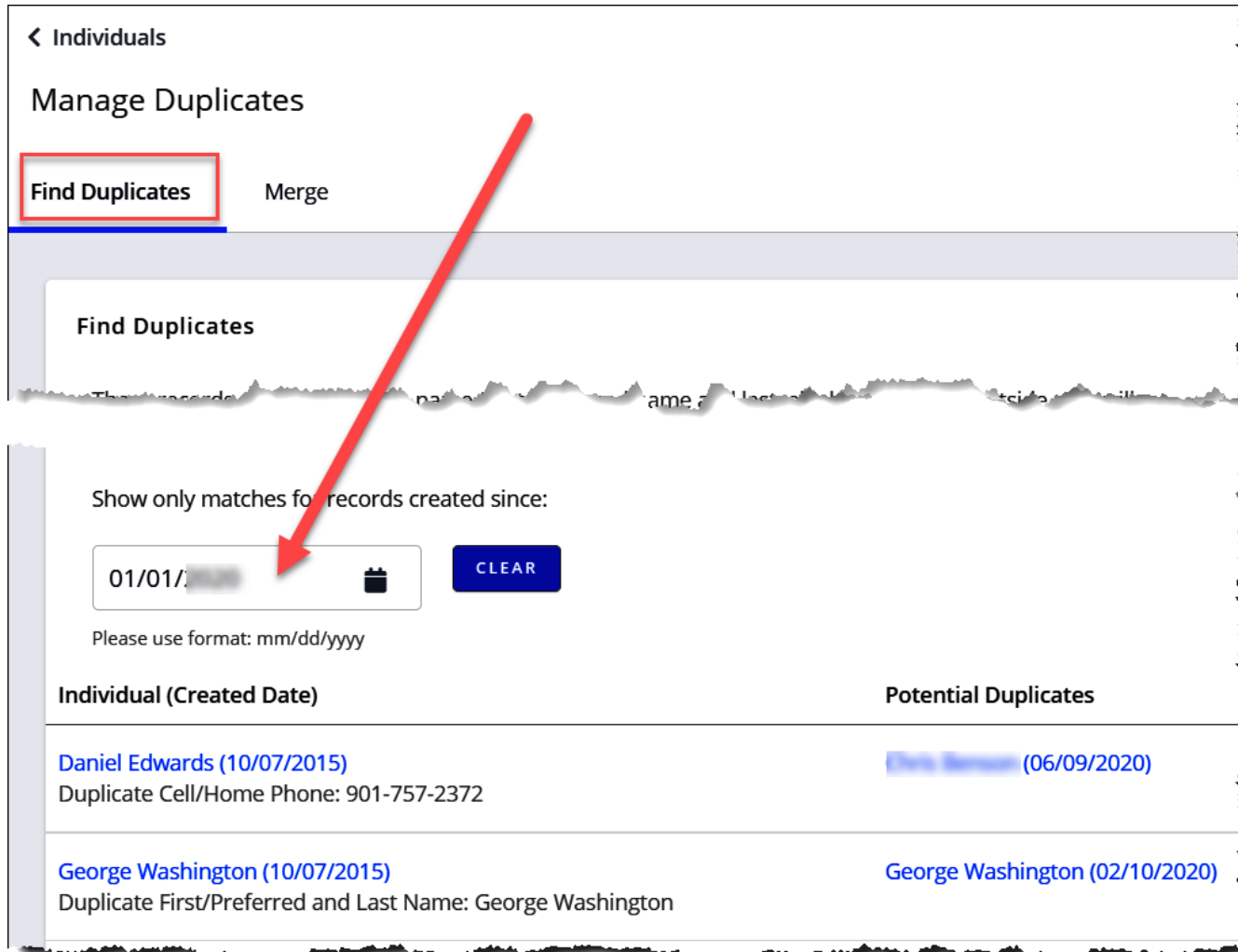
Family Records

Cleaning Up People in Groups

People: Merging Duplicates

2 ways to Merge:

- From Individual tab main screen
 - Find Duplicates
 - Merge
- From an Individual's Record



← Individuals

Manage Duplicates

Find Duplicates Merge

Find Duplicates

Show only matches for records created since:

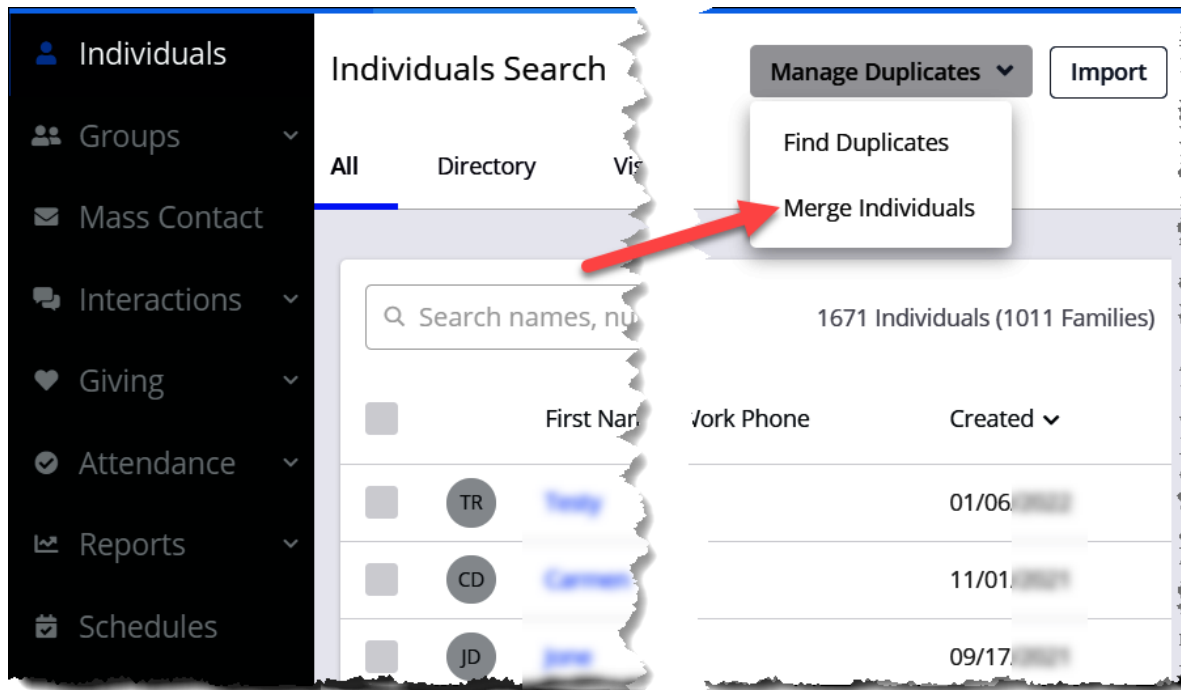
01/01/ [calendar icon] CLEAR

Please use format: mm/dd/yyyy

Individual (Created Date)	Potential Duplicates
Daniel Edwards (10/07/2015) Duplicate Cell/Home Phone: 901-757-2372	Chris Brown (06/09/2020)
George Washington (10/07/2015) Duplicate First/Preferred and Last Name: George Washington	George Washington (02/10/2020)


Merging

From Individual Tab



From an Individual's Record



Field	Individual 1	Individual 2
Individual 1:	Freddie and Mary Jo Smith	
Individual 2 (The Destination):	Freddie Smith	
Name	Freddie and Mary Jo Smith	Fredrick Dalton Smith
User ID	3514	3509
Created Date	02/25/2022	07/28/2021
Preferred Name	<input type="radio"/>	<input checked="" type="radio"/> Freddie
Username	<input type="radio"/> Freddie and Mary Jo.Smith	<input checked="" type="radio"/> Fredrick Dalton.Smith
Work Phone	<input checked="" type="radio"/> 111-222-3333	<input type="radio"/>
Family Members	<input checked="" type="checkbox"/> 0 family members <small>When merging a primary into another user the source family is always included.</small>	<input checked="" type="checkbox"/> 2 family members
Family Label Name	<input type="radio"/>	<input checked="" type="radio"/> Freddie & Mary Jo Smith
Attendance	<input type="checkbox"/> 0 entries	<input checked="" type="checkbox"/> 4 entries
Groups	<input checked="" type="checkbox"/> 1 group	<input checked="" type="checkbox"/> 4 groups
		 <input type="button" value="Merge"/>

People: Workflows to maintain records

Scenario:

The church creates a *Membership Status – Visitor Group*. As the visitor continues to participate in church the visitor moves into other Membership Status groups such as Attendees or Member.

How do we monitor the visitors that remain in the group?

-By Workflows>Trigger
(Membership Duration aka Join Date)

The screenshot displays a workflow configuration interface. At the top, there are tabs for 'List', 'Add', and 'Log'. The main configuration area is divided into several sections:

- Name:** A text field containing 'Moving Visitors to Delete Group'.
- Description:** A text area containing 'If a record has been in the visitors group for 51 weeks move to delete group and alert admin.'
- Active:** A checkbox labeled 'Active' which is checked.
- Match a Individual who has been in:** A dropdown menu showing 'Member Status - Visitor'.
- For:** A dropdown menu showing '51 weeks'.
- Group:** A section titled 'Group — Membership Duration' with a sub-description 'Individual has been in Member Status - Visitor for 51 weeks'.
- Message:** A text area containing 'Visitor moved to Record Status - Delete. Please review.'
- Buttons:** A green '+ Add Action' button at the bottom center and a dark blue 'Done' button at the bottom right.

People: Deleting Records

Things to Think about:

- Do you have groups to help you maintain records?
 - Delete Records Group
 - Records for Review
 - Deceased Records group
- Run CSV report before deleting records! *(once you delete you can't get the records back!)*
- Possibly run and download/print a Profile Report

People: Delete Records

Best Practice:

Only delete records from a Group!

This allows for:

- Running a CSV report
- Bulk deleting

Group Leader(s): None (Edit)

Fields ▾ ⋮

16 Individuals Selected

<input checked="" type="checkbox"/>	First Name	Last Name	Gender
<input checked="" type="checkbox"/>	Ned	Lawrence	M
<input checked="" type="checkbox"/>	Mary	Lawrence	F
<input checked="" type="checkbox"/>	Opie	MaHaffey	M
<input checked="" type="checkbox"/>	Edward J	McDill	M
<input checked="" type="checkbox"/>	Robert	McGregor	M
<input checked="" type="checkbox"/>	Charles	McGregor	M







Context Menu:

- Filter
- Last Interaction Report
- Edit Group
- Add Individuals to this Group
- Activate
- Inactivate
- Add to Group
- Move to Group
- Remove from Group
- Print PDF List or Labels
- Export to CSV
- Mass Edit
- Send Email/Text/Voice
- Assign/Log Interactions
- Delete Individuals From System

Red arrows point from the 'Export to CSV' and 'Delete Individuals From System' options in the context menu to the corresponding rows in the table.

People: Older Children under Parents

It is recommended to create policies where adult children are eventually removed from the immediate relationship with the parents.

Individuals					
Name	Primary	Relationship	Group Giving With Family	Parental Communication 	
Allen Adams ★	<input checked="" type="radio"/>	Primary 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dissolve Family
Ellen Adams	<input type="radio"/>	Wife 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	×
Jack Adams	<input type="radio"/>	Son 	<input type="checkbox"/>	<input type="checkbox"/>	 ×

+ ADD INDIVIDUALS TO FAMILY

Cancel Save

People: Older Children under Parents

Use **Other Relationships** to relate the adult child back to the parents.

Individuals ✎

Name	Relationship	Group Giving With Family	Parental Communication ⓘ
Jack Adams ★	Primary	Yes	Yes

Jack's Other Relationships ✎

Family	Directory/Profile ⓘ	Include In Check-In ⓘ	Parental Communication ⓘ
Allen & Ellen Adams	list Jack as Son ▼	<input type="checkbox"/>	<input type="checkbox"/> Allen Adams <input type="checkbox"/> Ellen Adams ×

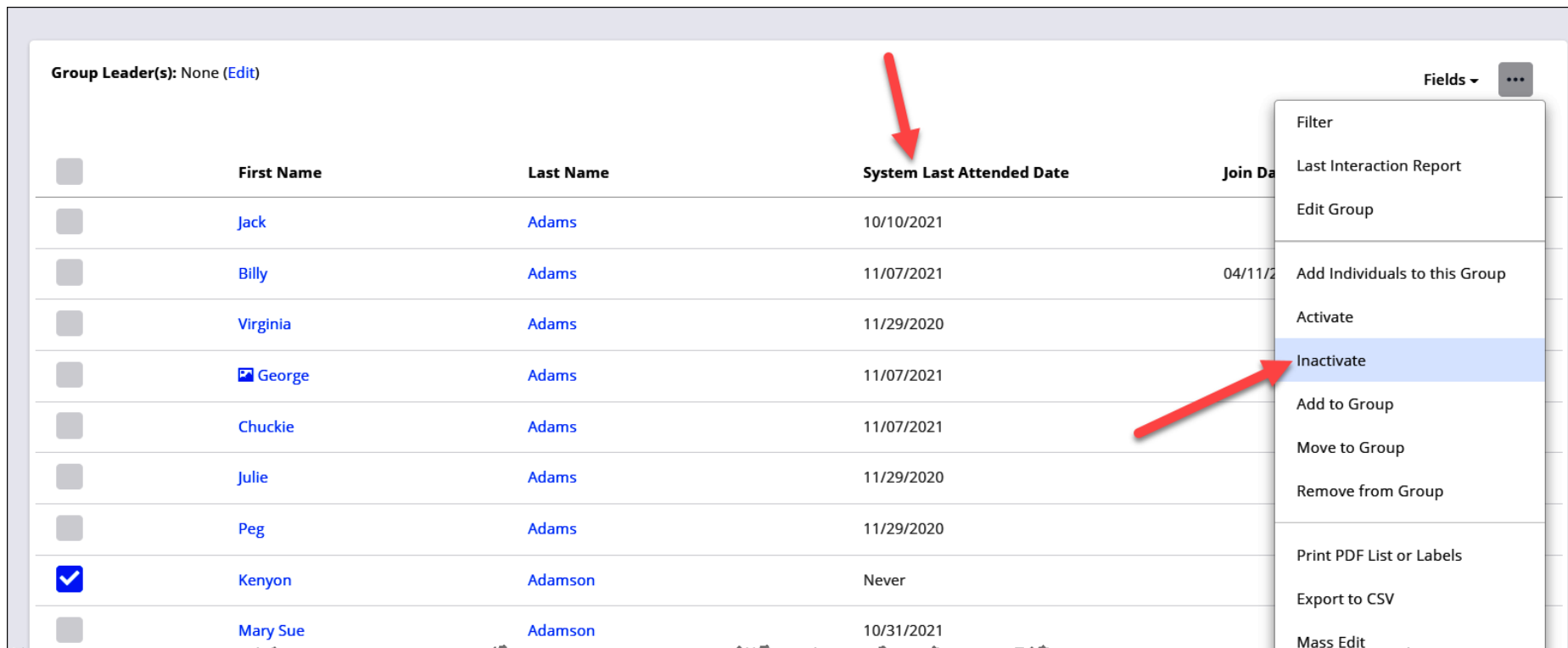
+ ADD JACK TO ANOTHER FAMILY

Cancel Save

People: Cleaning Up Records in Groups

Looking to inactive no longer active members in the Member group?

- Search by last attended or removed from role dates. *(Click on the column header to sort!)*



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

<input type="checkbox"/>	First Name	Last Name	System Last Attended Date	Join Date
<input type="checkbox"/>	Jack	Adams	10/10/2021	
<input type="checkbox"/>	Billy	Adams	11/07/2021	04/11/2021
<input type="checkbox"/>	Virginia	Adams	11/29/2020	
<input type="checkbox"/>	George	Adams	11/07/2021	
<input type="checkbox"/>	Chuckie	Adams	11/07/2021	
<input type="checkbox"/>	Julie	Adams	11/29/2020	
<input type="checkbox"/>	Peg	Adams	11/29/2020	
<input checked="" type="checkbox"/>	Kenyon	Adamson	Never	
<input type="checkbox"/>	Mary Sue	Adamson	10/31/2021	

Fields ▾ ⋮

- Filter
- Last Interaction Report
- Edit Group
- Add Individuals to this Group
- Activate
- Inactivate
- Add to Group
- Move to Group
- Remove from Group
- Print PDF List or Labels
- Export to CSV
- Mass Edit

People: Cleaning Up Records in Groups

Maybe you are trying to see who has missing information such as cellphone, address, email, etc.

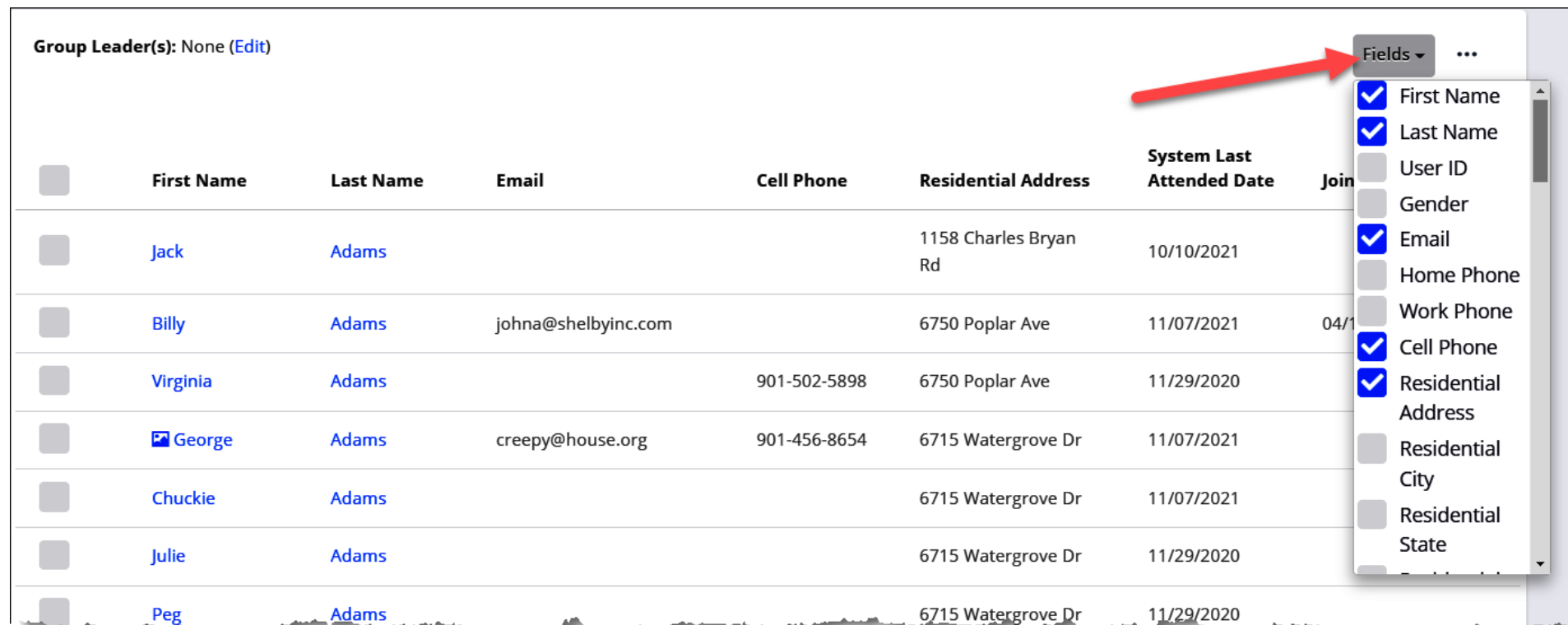
- Use your **Field** filters in the group to specify what fields you would like to review.

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

	First Name	Last Name	Email	Cell Phone	Residential Address	System Last Attended Date	Join
<input type="checkbox"/>	Jack	Adams			1158 Charles Bryan Rd	10/10/2021	
<input type="checkbox"/>	Billy	Adams	johna@shelbyinc.com		6750 Poplar Ave	11/07/2021	04/1
<input type="checkbox"/>	Virginia	Adams		901-502-5898	6750 Poplar Ave	11/29/2020	
<input type="checkbox"/>	George	Adams	creepy@house.org	901-456-8654	6715 Watergrove Dr	11/07/2021	
<input type="checkbox"/>	Chuckie	Adams			6715 Watergrove Dr	11/07/2021	
<input type="checkbox"/>	Julie	Adams			6715 Watergrove Dr	11/29/2020	
<input type="checkbox"/>	Peg	Adams			6715 Watergrove Dr	11/29/2020	

Fields ▾ ...

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



Group Maintenance

Naming Conventions

Using Properties

Using Group Views

Archiving

Deleting

Group Maintenance: Naming Conventions

Sometimes the best sorting solution when you have many groups is using some name conventions.

For instance, having all Volunteer Groups start with VOL or all Sunday School Classes start with Sunday School.

<input checked="" type="checkbox"/>	Small Groups - Financial Peace University
<input type="checkbox"/>	Small Groups - Power Tools
<input type="checkbox"/>	Sunday School - Adult 60 + Singles
<input type="checkbox"/>	Sunday School - Adult Singles 35 to 59
<input type="checkbox"/>	Sunday School - Adult 2 Ladies Class
<input type="checkbox"/>	Sunday School - Adult 2 Men's Class
<input type="checkbox"/>	Sunday School - Adult 3 Ladies Class
<input type="checkbox"/>	Sunday School - Adult 3 Men's Class
<input type="checkbox"/>	Sunday School - Adult 4 Ladies Class
<input type="checkbox"/>	Sunday School - Adult 4 Men's Class
<input type="checkbox"/>	Sunday School - Adult 5 Ladies Class
<input type="checkbox"/>	Sunday School - Adult 5 Men's Class

Group Maintenance: Group Properties

Can be used for/with:

- Filtering
- Group Finder
- Check-In
- Group Views

The screenshot displays a web interface for managing group properties, organized into three main sections: Life Groups, Missions, and Type. Each section contains a list of property tags with a red 'x' icon for removal, and an 'Add Property' input field with a 'Save' button.

Life Groups

- Adult
- Back Pack Outreach
- Children's
- Men's
- Youth

Add Property Save

Missions

- Adult Missions
- High Comm
- Low Comm

Add Property Save

Type

- Choir
- Class
- Committee
- Council
- Organization Group
- Outreach
- Profile
- Reserved Seating Worshij

Group Properties

Filtering in Groups

Filters
RESET

Groups

Group Views

Show active Groups only

Match ANY selected properti...

Childcare Provided?
0/2 +

Leadership
0/2 -

Board Members

Committees

Organizations
0/5 +

Small Groups
0/7 +

Volunteer Opportunit...
0/3 -

Children's Ministry

Hospitality

Youth

Group Finder

Find A Group

Find Groups Close To You

Group


Small Groups - Financial Peace University


Financial Peace University (by Dave Ramsey)
Learn how to make your money work for you!
 Thursday Classes at 7pm (January 28th - March 25th)
 Enrollment: \$110 per household

Meets At [7345 Goodlett Farms Pkwy. Cordova, TN 38016](#)

Details

Leader(s):


George Adams


Juliet Adams

Day: Thursday
Time: 7:00 PM
Organizations: Small Groups
Small Groups: Married/Single with Kids

Group Properties

Check-In

Group Selection Options

Only Allow People To Be Checked Into Groups They Are
If selected, some people may not be able to check in as a result

Limit Groups To Those Tagged With The Following Property

Children's Sunday School

Committees

No Gr

ORGANIZATIONS

Adult Sunday School

Children's Sunday School

Music Ministry

Testing: Show Group Suggestions as if it were this date and time

Group Views

View Settings

VIEW TITLE
Sunday School

GROUP SETTINGS

Active Groups Only
 Archived Groups Only
 Active And Archived Groups

PROPERTY MATCH

Match Any
 Match All

PROPERTIES 2/19

ORGANIZATIONS

- Adult Sunday School ✓
- Children's Sunday School ✓
- Music Ministry
- Small Groups
- Youth Sunday School

AGGREGATES 0/59

Select Aggregates

Cancel Save

Group Maintenance: Group Views

Can be used for/with:

- Filtering
- Reporting

Views

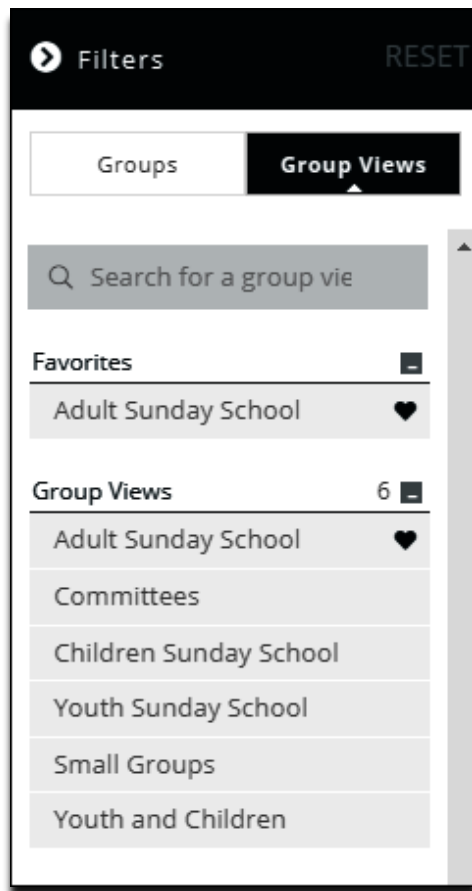
LIST ADD VIEW

Search Views...

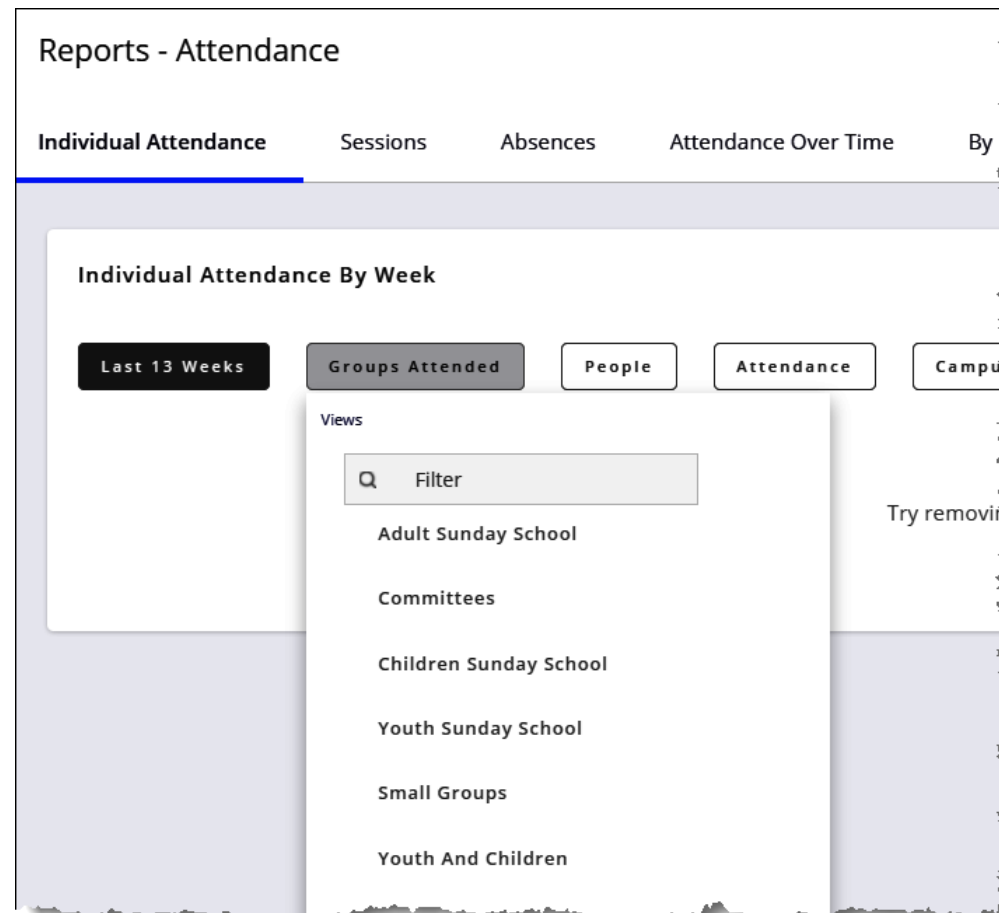
▲ TITLE	GROUPS IN VIEW	CREATED BY	LAST USED REPORTING	FAVORITE
Adult Sunday School	0			♥
Children Sunday School	11	Power User		♥
Committees	6			♥
Small Groups	2	Power User		♥
Youth Sunday School	6	Power User		♥

Group Views

Filtering in Groups



Reporting



Group Maintenance: Archiving

Reasons to Archive:

- Save old groups with attendance
- Some groups are only used for part of the year
- Old Giving groups

Remember to select the groups you wish to archive **BEFORE** going the action icon to select **Mass Archive/Activate!**

The screenshot shows a web interface for managing groups. At the top, there is a search bar containing the text "sunday school". Below the search bar is a table with columns for "Name" and "Leader(s)". The table lists several groups, each with a checkbox on the left. The groups listed are:

	Name	Leader(s)
<input type="checkbox"/>	Children's Sunday School Teacher	
<input type="checkbox"/>	Sunday School - Adult 60 + Singles	
<input type="checkbox"/>	Sunday School - Adult Singles 35 to 59	
<input type="checkbox"/>	Sunday School - Adult 2 Ladies Class	
<input checked="" type="checkbox"/>	Sunday School - Adult 2 Men's Class	
<input checked="" type="checkbox"/>	Sunday School - Adult 3 Ladies Class	
<input checked="" type="checkbox"/>	Sunday School - Adult 3 Men's Class	
<input checked="" type="checkbox"/>	Sunday School - Adult 4 Ladies Class	

On the right side of the table, there is a dropdown menu with a red arrow pointing to the "Mass Archive/Activate" option. The menu items are:

- 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 Interactions

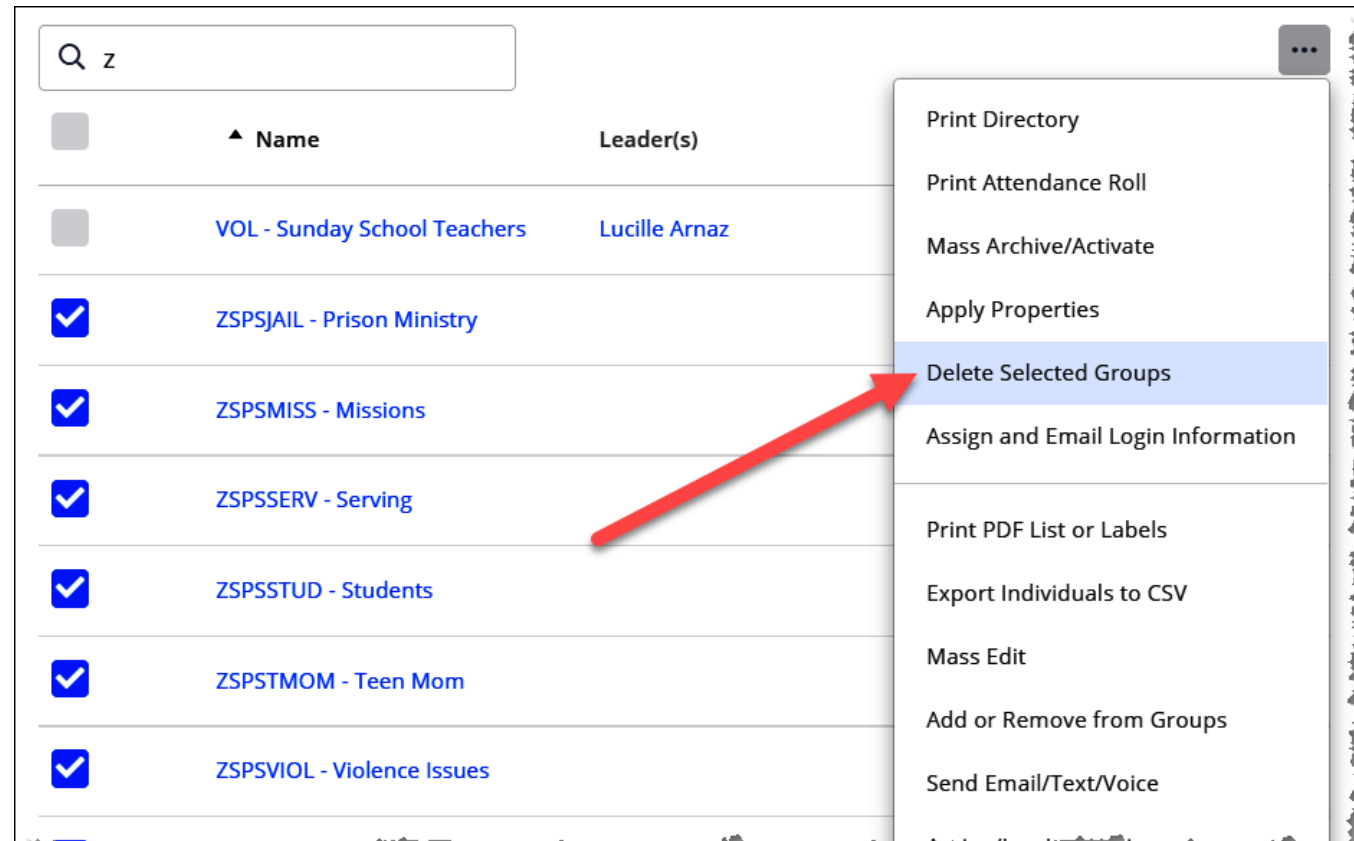
Group Maintenance: Deleting Groups

Reasons to Delete:

- Clean up unused groups that converted from your old database
- Purging Groups that are no longer used

Remember to select the groups you wish to delete **BEFORE** clicking on the action icon and selecting **Delete Selected Groups**.

BE CAREFUL- Attendance will be lost!



The screenshot displays a web interface for group management. At the top left, there is a search bar containing the letter 'z'. Below it is a table with columns for a checkbox, 'Name', and 'Leader(s)'. The table lists several groups, with the first one 'VOL - Sunday School Teachers' having a grey checkbox and leader 'Lucille Arnaz'. The following groups have blue checkmarks: 'ZSPSJAIL - Prison Ministry', 'ZSPSMISS - Missions', 'ZSPSSERV - Serving', 'ZSPSSTUD - Students', 'ZSPSTMOM - Teen Mom', and 'ZSPSVIOL - Violence Issues'. A red arrow points from the 'ZSPSMISS - Missions' row to a context menu that is open over it. The menu contains the following options: 'Print Directory', 'Print Attendance Roll', 'Mass Archive/Activate', 'Apply Properties', 'Delete Selected Groups' (highlighted in blue), 'Assign and Email Login Information', 'Print PDF List or Labels', 'Export Individuals to CSV', 'Mass Edit', 'Add or Remove from Groups', and 'Send Email/Text/Voice'.

<input type="checkbox"/>	Name	Leader(s)
<input type="checkbox"/>	VOL - Sunday School Teachers	Lucille Arnaz
<input checked="" type="checkbox"/>	ZSPSJAIL - Prison Ministry	
<input checked="" type="checkbox"/>	ZSPSMISS - Missions	
<input checked="" type="checkbox"/>	ZSPSSERV - Serving	
<input checked="" type="checkbox"/>	ZSPSSTUD - Students	
<input checked="" type="checkbox"/>	ZSPSTMOM - Teen Mom	
<input checked="" type="checkbox"/>	ZSPSVIOL - Violence Issues	

Giving

Pledges

Categories

Consolidate Giving

Correcting Giving Errors

Finding People based on Giving

Giving: Inactivating Pledge Campaigns and Pledgers

- Pledge Campaigns should be Inactivated BEFORE Categories are Inactivated.
- Deactivate the individuals pledges BEFORE inactivating the Pledge Campaign.
- You can still run Pledge Reports on Inactive Pledges.
- Individuals who are still paying on old Pledges can be individually activated on their record.

Settings

General Terminology Groups Profile Attendance Check-In Interactions **Giving** Services

Category Codes

Time to Build ✕ Time to Build - Non Cash Stock ✕ Time To Build - Non-Cash IRA ✕ Time to Build - Non Cash Gift in Kind ✕ Time to Build - Men's Wild Game Dinner ✕

Time to Build - Youth Fundraisers ✕

Name

Phase 2 - Time to Build

Goal Amount

\$ 1000000

Allow People To Create Their Own Pledges For This Campaign

Active

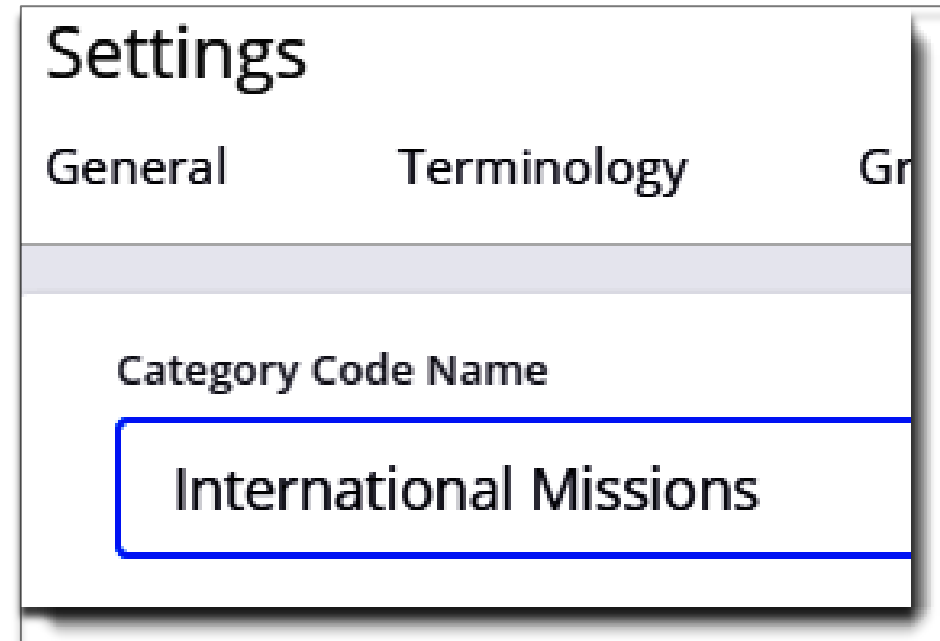
Delete Save

You can only delete campaigns with no pledges.

Deactivate Pledges

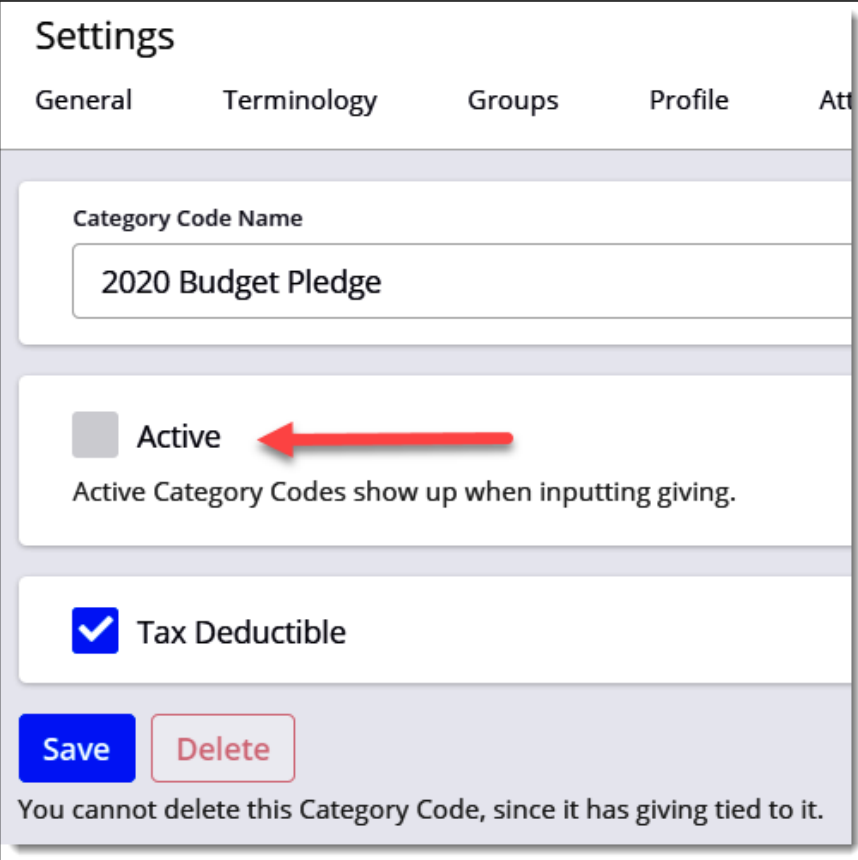
Giving: Editing Category Names

- Category Names appear on Giving Statements - appearance and clarity of the gift name is important.
- To Edit a Name, click on the gear, to the right of the name and edit the Category Code Name. Click Save.



Giving: Inactivating a Category

- There may be Category codes that are no longer being used.
- Inactivating the Category code will prevent it from appearing in your entry list.
- Inactivate Categories are available for reporting and included on statements.
- Inactive Categories can be found at the bottom of the page, under the Inactivate Category section.
- To Inactivate a Category, click on the gear next to the name and uncheck the Active box.




Settings

General Terminology Groups Profile Att

Category Code Name

2020 Budget Pledge

Active 

Active Category Codes show up when inputting giving.

Tax Deductible

[Save](#) [Delete](#)

You cannot delete this Category Code, since it has giving tied to it.

Giving: Deleting a Category

- Many customers have old, unused Categories.
- If a Category doesn't have giving history, it can be deleted. You'll see the Delete button is bright Red.
- To Delete a Category, click on the gear next to the name then click the bright red Delete button.
- No giving history is associated with that Category if it allows you to Delete!

The screenshot shows the 'Settings' page for a category named '2015 Pledge'. The page has tabs for 'General', 'Terminology', 'Groups', and 'Profile'. The 'General' tab is active. The 'Category Code Name' is '2015 Pledge'. There are two checked options: 'Active' and 'Tax Deductible'. At the bottom, there are 'Save' and 'Delete' buttons. A red arrow points to the 'Delete' button.

Settings
General Terminology Groups Profile
Category Code Name
2015 Pledge
<input checked="" type="checkbox"/> Active Active Category Codes show up when inputting giving.
<input checked="" type="checkbox"/> Tax Deductible
Save Delete

Giving: Gift to the wrong Person (Transfer)

- Search for the individual where the gift is posted.
- Click on their Giving tab and locate the gift under Giving History.
- To the right of the amount hover and then click on the Edit pencil.
- In the Transfer Gift To box search for the correct individual's name, select, then click Save.

Giving History

Date Filters: All History Tax Deductible: All

Date	Category Code	Source	Batch	Details	Amount
04/25/20	General Offering	Input		Check #12345	\$5,000.00

A red arrow points to a pencil icon next to the amount \$5,000.00.

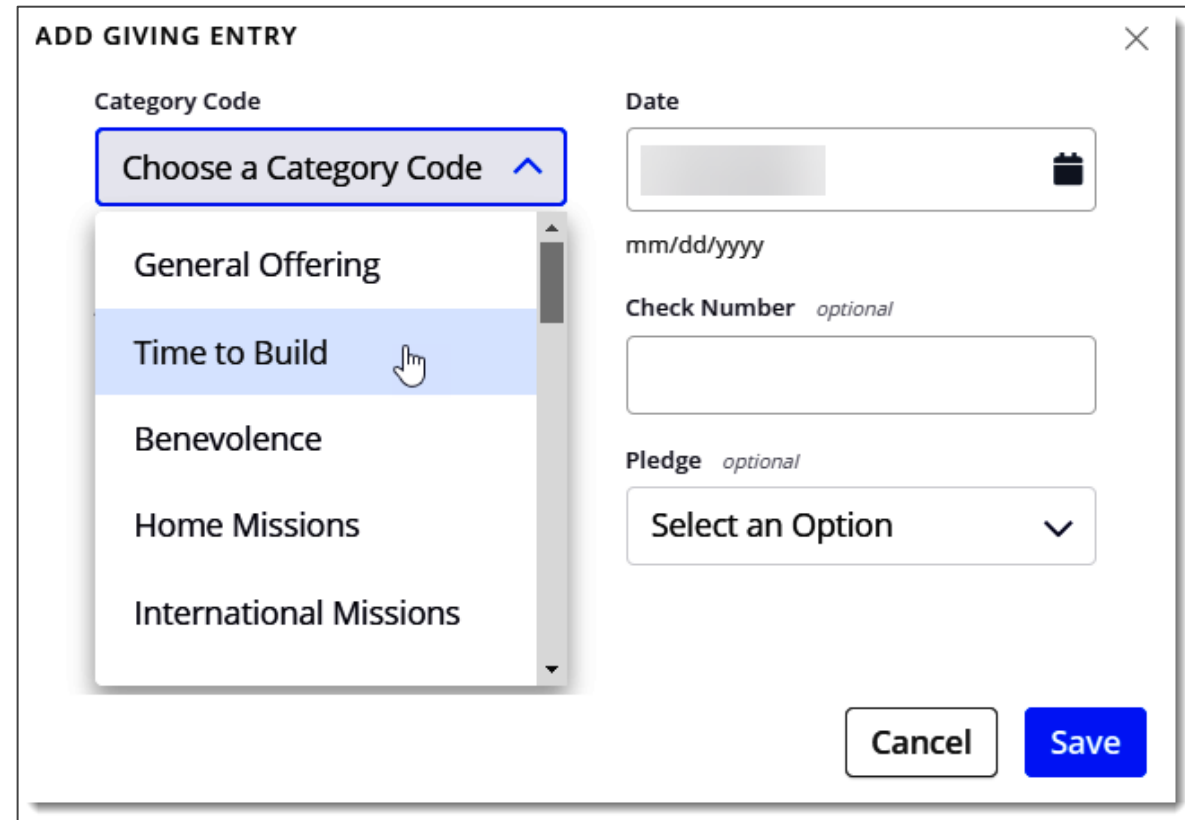
Transfer Gift To

john

- John Adams
- John (John Quincy) Adams
- John (Charles) Alexander

Giving: Gift posted to the wrong Category

- Search for the Individual and click on the Giving tab.
- Find the gift entry and click on Edit.
- Using the pull-down menu, change the Category code and click Save.



The screenshot shows a web form titled "ADD GIVING ENTRY". The "Category Code" dropdown menu is open, displaying a list of categories: "General Offering", "Time to Build" (highlighted with a mouse cursor), "Benevolence", "Home Missions", and "International Missions". The "Date" field is empty with a calendar icon and the format "mm/dd/yyyy". The "Check Number" field is optional and empty. The "Pledge" field is optional and set to "Select an Option". The "Cancel" and "Save" buttons are at the bottom right.

Giving: How does this impact the Financial Reporting?

- When you move monies from one Category to another, it may also mean a change the revenue account in your Financial Reporting.
- Options:
 - Sync by date (shown below) from the Reporting > Giving > Overview
 - Using caution with syncing, for online giving that hasn't been batched yet
 - Create a manual Journal Entry in the General Ledger.

ShelbyNext | Financials Sync

Journal Date *

05/02/20

The date the journal will be shown to post for.

Company	Year	Period
1 First church		11 May

Sync

Total in Journal Entry: 1500.00

New Contributions to Sync

Last Name	First Name	Category Code	Date	Amount
Adams	George	Time to Build	05/02/20	\$1,500.00

Giving: Removing or adding a Pledge to a Gift

- Scenario: It's the beginning of a new Pledge year and we've not received all the Pledges. We're already posting gifts without the pledge. We then receive the Pledge, and it's backdated to the beginning of the year. Now, we need to add the Pledge to Gifts that are already posted.
- Find the Gift in the Donors Giving history and click Edit.
- Using the pull-down menu, add or remove the pledge and click Save.
- Important! If you post revenue by Pledged vs. Unpledged giving, you may need to also change the Category.

The screenshot displays a form for editing a gift. The form includes the following fields and options:

- Category Code:** A dropdown menu currently set to "Time to Build".
- Date:** A date input field with a calendar icon and the placeholder "mm/dd/yyyy".
- Amount:** A text input field containing "\$ 1500.00".
- Check Number (optional):** A text input field containing "4642".
- Note (optional):** An empty text input field.
- Pledge (optional):** A dropdown menu currently set to "None". The dropdown is open, showing two options: "None" and "\$100.00, monthly, to Time to Build". A mouse cursor is hovering over the second option.

Below the form, there is a blue link labeled "→ Transfer Gift". At the bottom right, there are two buttons: a blue "Save" button and a red "Delete" button.

Giving: Consolidate Giving

- Tool to transfer ALL giving from one person within the family to another.
- Usually, it's because the gifts were not posted to the Primary spouse or partner when they are marked to give together.
- A common way this can happen is with online giving if the non-primary person is using their own credit card.
- Under Settings > Giving > Consolidate Family Giving, check the box next to the donor's name and click Go.
- This a "must do" step before running statements!

Name	User ID	Relationship	Group Giving With Family
George Adams ★	11	Primary	Yes
Julie Adams	12	Wife	Yes


Settings

<input type="checkbox"/>	First Name	Last Name	User ID
<input checked="" type="checkbox"/>	Julie	Adams	12

Go

Giving: Consolidate Giving when the primary spouse has died

- Follow the same steps from the prior slide except switch the Primary Relationship on the spouses from the Family tab on their record.
- Use Consolidate Giving to transfer all the giving and pledge history (if applicable).

Name	User ID	Relationship	Group Giving With Family
Julie Adams 	12	Wife	Yes
George Adams	11	Husband	Yes

Settings

First Name Last Name User ID

George Adams 11

Go



Giving: Before Deleting a Record with Giving History

- Print the current year Statement!
- As a best practice, you should print and retain a full set of statements for each calendar year.
- If someone needs a statement from one of those years after they are removed, it can be easily found.
- Giving History is not removed from the ChMS with the Donor. It's transferred automatically to either the surviving spouse or the anonymous record.

The screenshot shows two parts of a software interface. On the left is a 'GET STATEMENT' dialog box with the following options:

- Date Filters:** Last Calendar Year (selected), Last Quarter, Year To Date, Date Range.
- Tax Deductible:** All (selected), Yes, No.

Buttons at the bottom of the dialog are 'Cancel' and 'Next'.

On the right is the 'Giving Detail' table. The table has columns: Last Name, First Name, Date, Category Code, Source, Batch, and Details. A dropdown menu is open over the table, showing options: Print Statement (selected), Email Statements, Save as CSV, and Current Page. The table content shows a row with 'General Offering' and 'Input' under the Category Code and Source columns respectively.

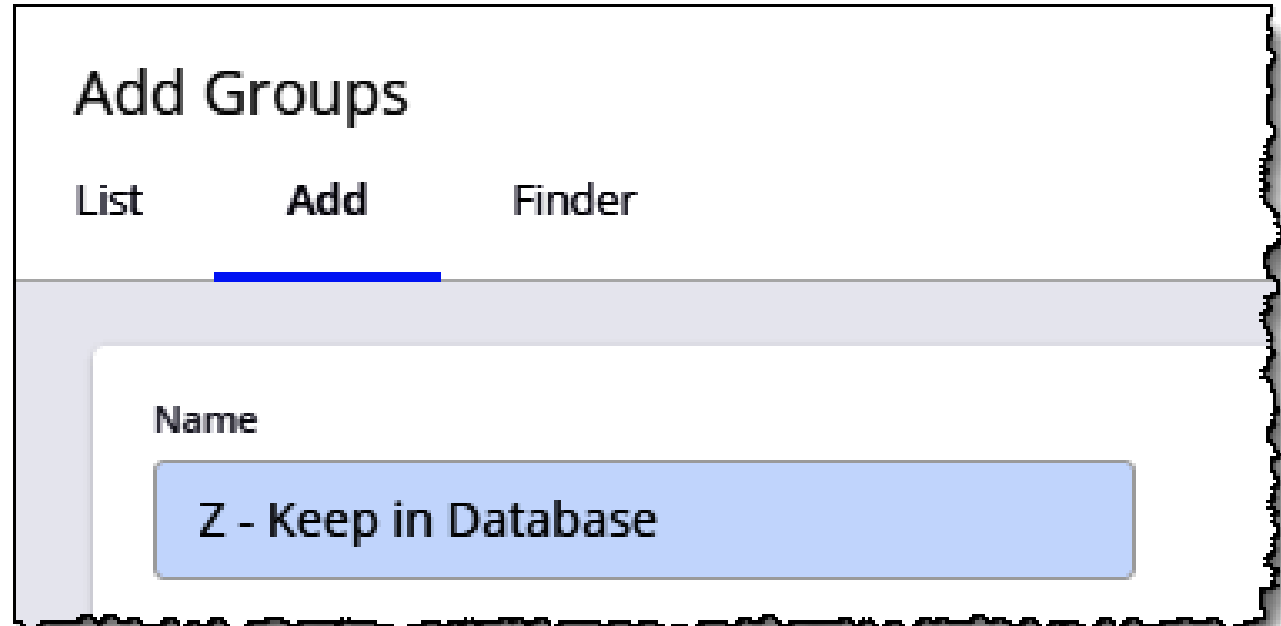
Giving: Finding Individuals with families who are no longer Giving or Attending

- When looking for individuals that need to be removed based on lack of Attendance or Giving, we need to include the family members. Your Keepers!
- When completed, this step will provide you with a group of potential individuals or families that are good candidates for removing from the database.
- You may need to also include individuals even if they haven't given or attended during the chosen date range.
 - Members and their families
 - Staff
 - Homebound
 - Military

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 1: Create a Temporary Group for those who have donated or attended and families. Ex. "Z - Keep in Database".

- For this type of Group, you may want to use a prefix such as "Z" so it will sort to the bottom of the Group List.
- Click on Groups > List > Add and enter the name of the Group then Click Save.



The screenshot shows a web interface titled "Add Groups". At the top, there are three tabs: "List", "Add", and "Finder". The "Add" tab is currently selected, indicated by a blue underline. Below the tabs is a light gray header bar. Underneath, there is a white box with a "Name" label. A blue text input field is positioned below the label, containing the text "Z - Keep in Database".

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 2: Run a Giving Report and add the Donors and Families to the new Group.

- Reports > Giving > Summary
- Enter Date Range, Category Criteria, Giving Limits, and Click Done.
- Click Apply.

The screenshot displays the 'Reports - Giving Summary' interface. The left sidebar contains navigation options: Individuals, Groups, Mass Contact, Interactions, Giving, Attendance, Reports, My Reports, Overview, Giving, and Attendance. The main content area shows the 'Summary' tab selected, with sub-tabs for Overview, Summary, Detail, By Anonymous, Batches, Pledges, and Demographics. A date range filter is open, showing '01/01/20 - 03/07/2022'. Below the date range, there are buttons for 'Category Code', 'Group', 'Campus', 'More Filters', and 'Apply'. The 'Start' and 'End' date fields are visible, along with 'Cancel' and 'Done' buttons. The 'First Name' field is populated with 'Barney'.

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 3: Add Individuals and families to Group.

- Using the pull-down menu, choose 'All Individuals in Family'.
- Enter the Group in the Groups field.
- Click Go.

Take action on

All Individuals in Family ▼

[Preview List](#)

Groups Show Archived

xZ - Keep in Database

Join Date 03/07/20

Add Selected Individuals As Active

Add As Inactive

Remove

Go

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 4: Find Individuals who HAVE Attended as of a specific date.

- Click on Advanced search.
- Choose 'On or After' and enter the date.
- Select all the Individuals (check the box).
- Scroll to the bottom of the page and click on the Action button (3 dots) and choose 'Add or Remove from Groups'.
- Add to Group and include 'All Individuals in Family' as in Step 2.

Last Attended Date

On or After ▼ 01/01/

155 Individuals (133 Families) ...

<input checked="" type="checkbox"/>	Last Name ^	First Name	Birth Date	Family Relationship	Marital Status
<input checked="" type="checkbox"/>	Adams	George	02/24/1980	Husband	Married
<input checked="" type="checkbox"/>	Adams	Julie	02/24/1980	Wife	Married
<input checked="" type="checkbox"/>	Adams	Peg	02/24/1996	Daughter	Single
<input checked="" type="checkbox"/>	Adams	Louisa	02/08/1944	Wife	Married

Print PDF List or Labels

Export Individuals to CSV

Mass Edit

Add or Remove from Groups

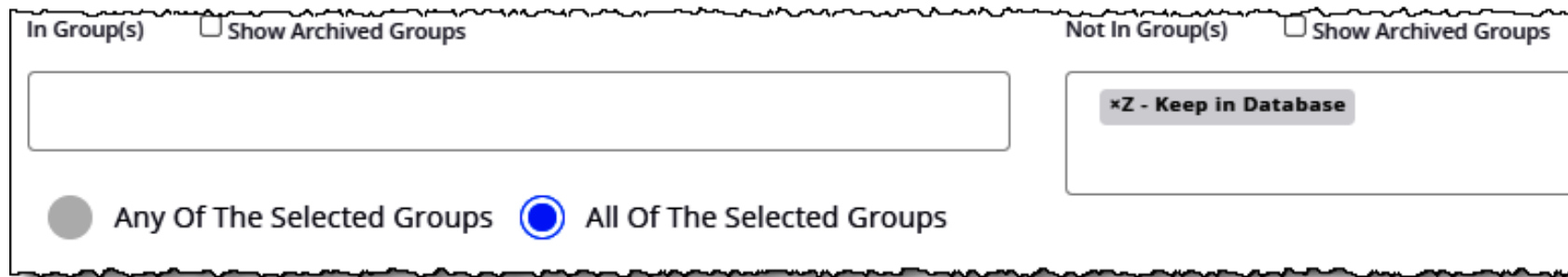
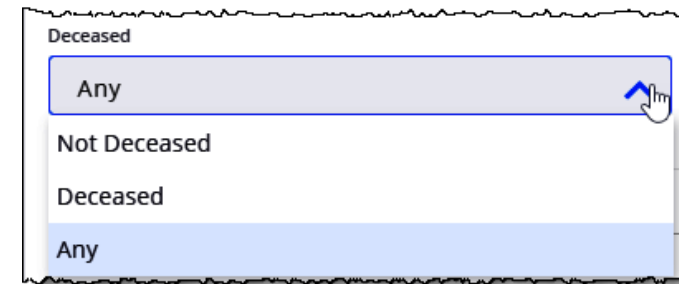
Send Email/Text/Voice

Assign/Log Interactions

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 5: Compare this Group to the entire database.

- Click on Advanced Search.
- Tip! Change Deceased filter from Not Deceased to Any if you want to include those who have died.
- Add the Group in the 'Not in Group(s)' Filter.



Giving: Finding Individuals with families who are no longer Giving or Attending

Step 6: Add those not in the 'Keep' Group to a 'Remove' Group.

- Scroll down to the bottom of the page.
- Select all the Names.
- Add them to a New Group ex. 'Remove from Database'.

The screenshot shows a web interface for managing individuals. It features a 'Take action on' dropdown menu set to 'These Individuals'. Below this is a 'Group' dropdown menu set to 'Z - Remove from Database'. To the right of the 'Group' dropdown is a 'Show Archived' checkbox, which is currently unchecked. Further right is a 'Join Date' field with a calendar icon. Below these fields are three radio button options: 'Add Selected Individuals As Active' (selected), 'Add As Inactive', and 'Remove'. A blue 'Go' button is located in the bottom right corner of the form area.

Take action on
These Individuals

Group Show Archived

Join Date

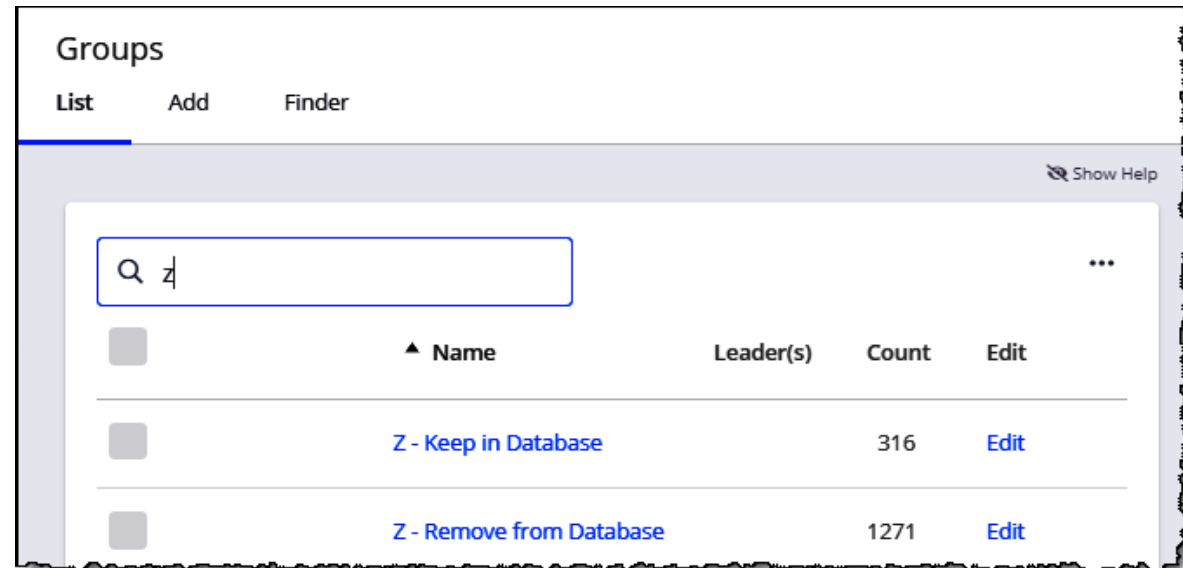
Add Selected Individuals As Active
 Add As Inactive
 Remove

Go

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 7: Review list and export to CSV

- Tip! Run a Directory by family and carefully review the names.
- Move anyone from the 'Remove' to the 'Keep' Group that should stay.
- Create a CSV (Insurance Policy).



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 containing the letter 'z'. To the right of the search bar is a 'Show Help' link. Below the search bar is a table with the following columns: Name, Leader(s), Count, and Edit. The table contains two rows of data:

Name	Leader(s)	Count	Edit
Z - Keep in Database		316	Edit
Z - Remove from Database		1271	Edit

Giving: Finding Individuals with families who are no longer Giving or Attending

Step 8: Remove individuals

- Only Admins or users with the permission to Delete individuals will have this option.
- Click on the Group Name.
- Select the Names in the Group.
- Choose Delete Individuals from System.
- What happens to the Giving? It goes to the Anonymous Record.

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

1,271 Individuals Selected

<input checked="" type="checkbox"/>	First Name	Last Name	User ID	Email	Home Phone	Work Phone	Cell Phone
<input checked="" type="checkbox"/>	John	Adams	1610				
<input checked="" type="checkbox"/>	Abigail	Adams	1611	abigail@yahoo.com			901-254-6
<input checked="" type="checkbox"/>	Kenyon	Adamson	9				
<input checked="" type="checkbox"/>	Mary Sue	Adamson	10				
<input checked="" type="checkbox"/>	Roberta	Alexander	23				
<input checked="" type="checkbox"/>	Thomas B.	Alexander	24	TAlexander@hotmail.com			
<input checked="" type="checkbox"/>	Barbara C.	Allen	26				
<input checked="" type="checkbox"/>	Ben W	Allen	28				
<input checked="" type="checkbox"/>	John Clayton	Allen	31				
<input checked="" type="checkbox"/>	Alvin	Alley	36				
<input checked="" type="checkbox"/>	Ferrell	Alman	37				
<input checked="" type="checkbox"/>	Herb	Alpert	20				

Filter

Last Interaction Report

Edit Group

Add Individuals to this Group

Activate

Inactivate

Add to Group

Move to Group

Remove from Group

Print PDF List or Labels

Export to CSV

Mass Edit

Send Email/Text/Voice

Assign/Log Interactions

Delete Individuals from System

Where can I watch this video again?

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Webinars**

@ Community.Shelbysystems.com

Now Including Slides to Download

The screenshot displays the 'Advance Your Knowledge Webinar Series' website. It features a blue header with the series name. Below the header, there is a section for 'Register for an Upcoming Webinar' with a 'Register NOW' button. A table lists upcoming webinars, including 'Purpose Driven Forms – Part 2 (Giving, Special Events, and Holiday preparations)' on 10/27/2021. Below this, there is a section for 'Watch a Previous Webinar' with a table listing past webinars and their slide download links.

Click on a Title to Watch NOW	Presented	
Things You Need To Know Before Year-End for eFiling Your W2s and 1099s	10/20/2021	Slides
Making, Tracking, and Reporting Budgets	09/22/2021	Slides
Purpose Driven Forms – Part 1 (Getting Ready for Fall)	08/11/2021	Slides
A Quick Look at Best Practices for Groups	07/28/2021	Slides

Next “Advance Your Knowledge” Webinar

Database Cleanup: Shelby Financials Fixing Mistakes

Date: 4/27/22

Time: 3pm E/2pm C/12pm P

Led by: Ben Lane & Mark Crain

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Coming Soon!!!

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.



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