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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

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People

What we'll talk about

Groups

Giving

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People

- Merging
- Workflows
- Deleting Records
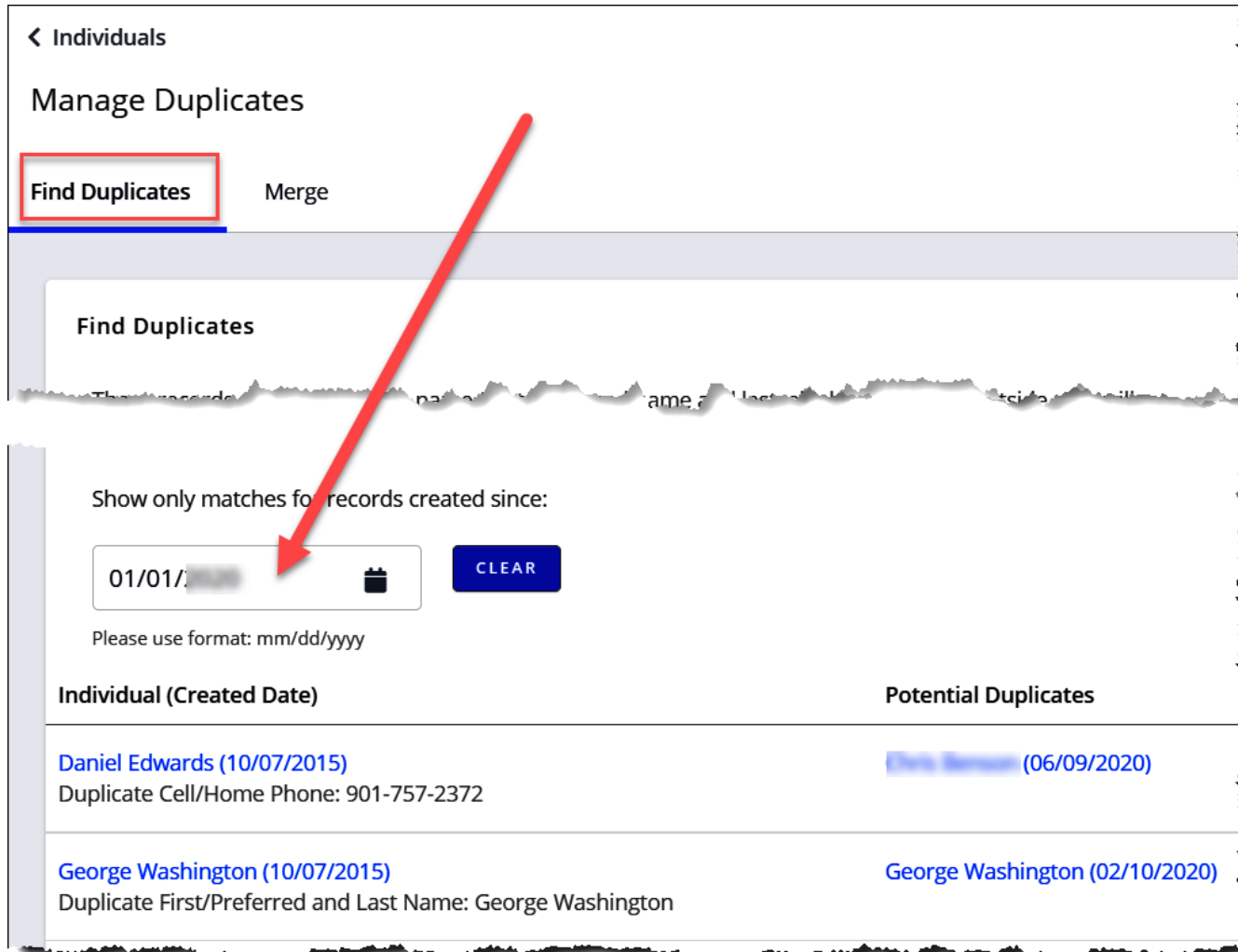- Family Records
- Cleaning Up People in Groups

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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:

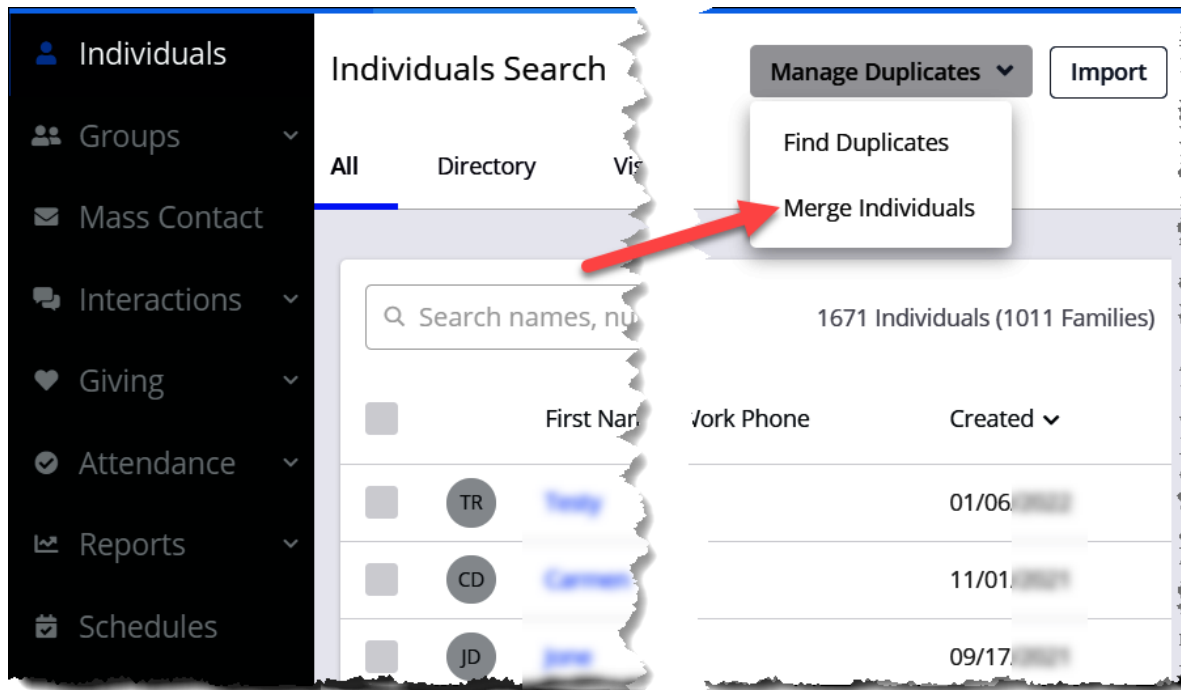01/01/   📅   CLEAR

Please use format: mm/dd/yyyy

Individual (Created Date)   **Potential Duplicates**

Daniel Edwards (10/07/2015)   (06/09/2020)
Duplicate Cell/Home Phone: 901-757-2372

George Washington (10/07/2015)   George Washington (02/10/2020)
Duplicate First/Preferred and Last Name: George Washington

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Merging

From Individual Tab

From an Individual's Record

Individual 1:	Individual 2 (The Destination):
Freddie and Mary Jo Smith	Freddie Smith

Field	Individual 1	Individual 2
Name	Freddie and Mary Jo Smith	Fredrick Dalton Smith
User ID	3514	3509
Created Date	02/25/2022	07/28/2021
Preferred Name	⦿	⦿ Freddie
Username	⦿ Freddie and Mary Jo.Smith	⦿ Fredrick Dalton.Smith
Work Phone	⦿ 111-222-3333	⦿

Family Members When merging a primary into another user the source family is always included.	☑ 0 family members	☑ 2 family members
Family Label Name	⦿	⦿ Freddie & Mary Jo Smith
Attendance	☐ 0 entries	☑ 4 entries
Groups	☑ 1 group	☑ 4 groups

Merge

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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)

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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

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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 ★	🔵	Primary ⌄	☑	☑	**Dissolve Family**
Ellen Adams	⚪	Wife ⌄	☑	☑	✕
Jack Adams	⚪	Son ⌄	☐	☐	✕

+ ADD INDIVIDUALS TO FAMILY

Cancel   Save

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People: Older Children under Parents

Use **Other Relationships** to relate the adult child back to the parents.
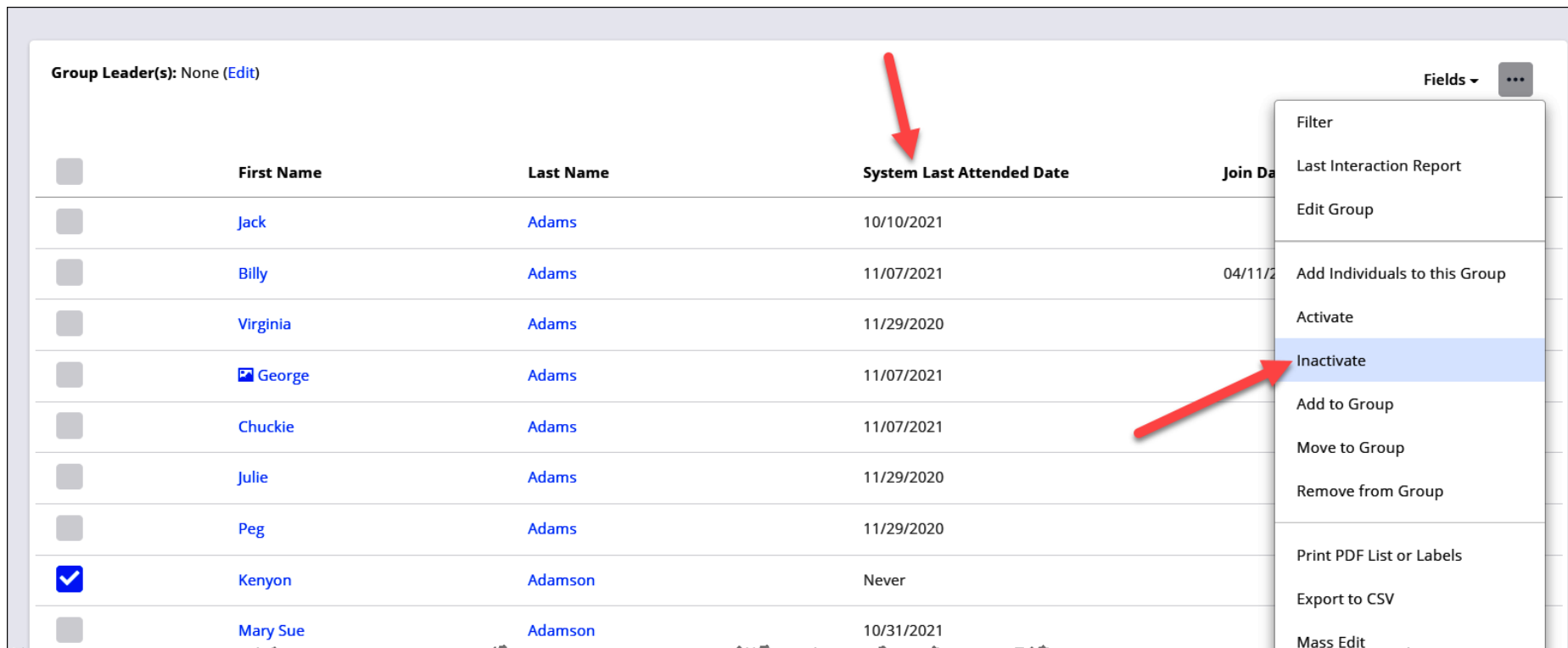
People: Cleaning Up Records in Groups

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!)*

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 Maintenance

Naming Conventions

Using Properties

Using Group Views

Archiving

Deleting

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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.

☐	Small Groups - Financial Peace University
☐	Small Groups - Power Tools
☐	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

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Group Maintenance: Group Properties

Can be used for/with:

• Filtering

• Group Finder

• Check-In

• Group Views

Group Properties

Filtering in Groups

Filters   RESET

| Groups | Group Views |

Show active Groups only ⌄

Match ANY selected properti... ⌄

🔍 Search for a property

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

Any Campus ⌄	Any Childcare Provided? ⌄
Married/Single with Kids ⌄	Any Volunteer Opportunities ⌄
Any Meeting Day ⌄	Any Meeting Time ⌄

Find Groups Close To You

Enter your full address

View Map

| Group | Details |

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

Leader(s):

George Adams

Juliet Adams

Join

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

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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 resul

Limit Groups To Those Tagged With The Following Property

Children's Sunday School	∧

Committees

ORGANIZATIONS

Adult Sunday School

Children's Sunday School

Music Ministry

No Gr

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

Group Views

View Settings

VIEW TITLE

Sunday School	🔲

view.

GROUP SETTINGS	PROPERTY MATCH
🔘 Active Groups Only	🔘 Match Any
⚪ Archived Groups Only	⚪ Match All
⚪ Active And Archived Groups	

PROPERTIES   2/19   AGGREGATES   0/59

	Select Aggregates

ORGANIZATIONS

Adult Sunday School   ✓

Children's Sunday School   ✓

Music Ministry

Small Groups

Youth Sunday School

Cancel   **Save**

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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		♥

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Group Views

Filtering in Groups
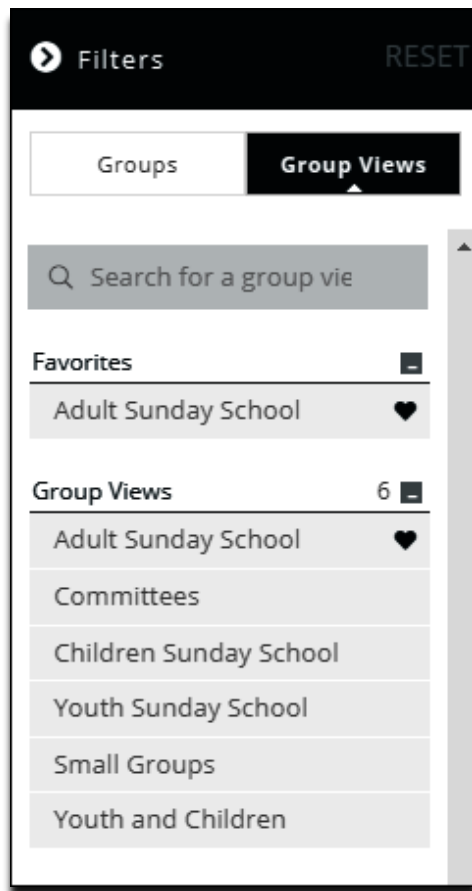
Reporting
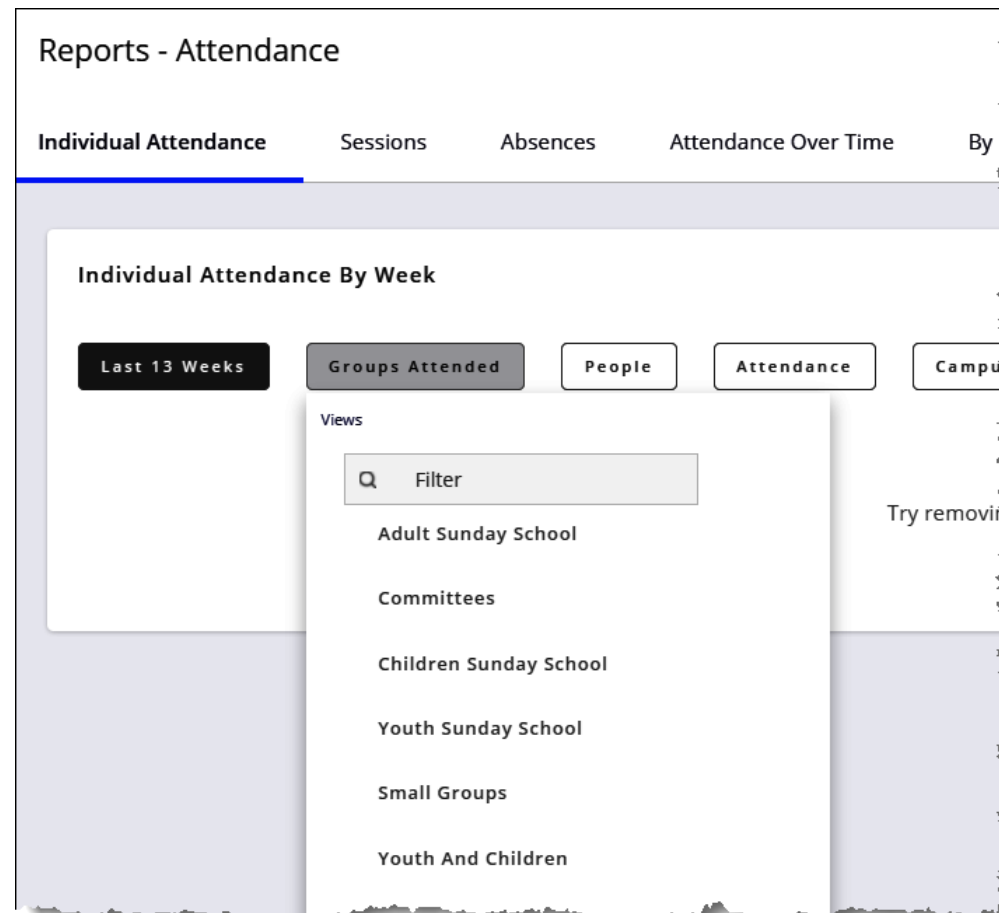
Group Maintenance: Archiving

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**!

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!

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Giving

Pledges

Categories

Consolidate Giving

Correcting Giving Errors

Finding People based on Giving

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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.

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.

Settings

General   Terminology   Gr

Category Code Name

International Missions

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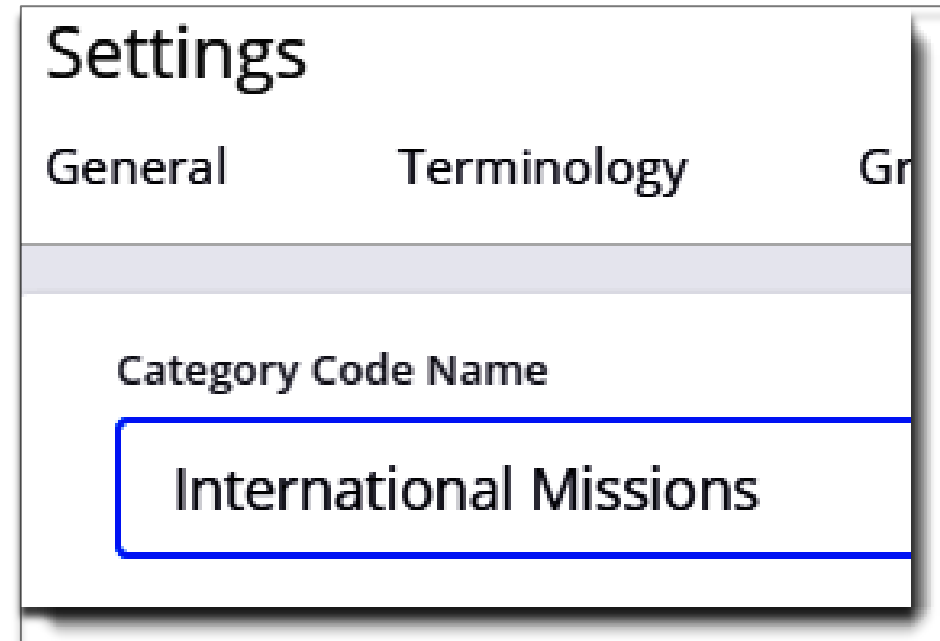
Giving: Inactivating a Category

- 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.

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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.

- <u>No giving history is associated with that Category if it allows you to Delete!</u>

Settings

| General | Terminology | Groups | Profile |

Category Code Name

2015 Pledge

☑ Active

Active Category Codes show up when inputting giving.

☑ 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

Tax Deductible

All History	∨	All	∨

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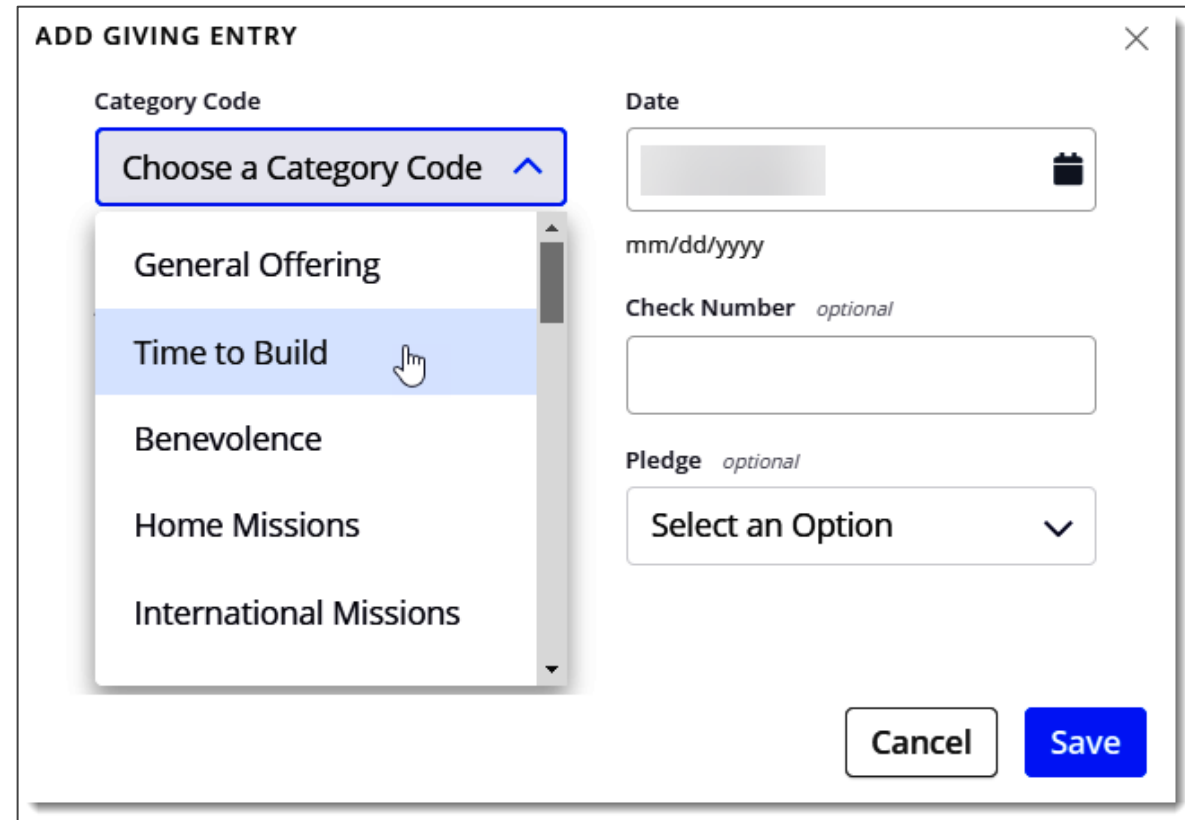
Transfer Gift To

john

John Adams

John (John Quincy) Adams

John (Charles) Alexander

Save **Delete**

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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.

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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.

Category Code

Time to Build ⌄

Date

[   ] 🗓

mm/dd/yyyy

Amount

$ 1500.00

Check Number *optional*

4642

Note *optional*

[   ]

Pledge *optional*

None ⌃

None

$100.00, monthly, to Time to Build

→ **Transfer Gift**

Save **Delete**

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Giving: Consolidate Giving

- Tool to transfer ALL giving from one person <u>within the family</u> 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

	First Name	Last Name	User ID
☑	Julie	Adams	12

Go

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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.

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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, <u>we need to include the family members</u>. Your Keepers!

- When completed, this step will provide you with a group of potential individuals or families that are good <u>candidates</u> 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.
  - o Members and their families
  - o Staff
  - o Homebound
  - o Military

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

Step 1: Create a Temporary Group for those who <u>have donated or attended and families</u>. 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.

Add Groups

List   **Add**   Finder

Name

Z - Keep in Database

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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.

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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   Join Date

×Z - Keep in Database   03/07/20⬜ 📅

🔘 Add Selected Individuals As Active
⚪ Add As Inactive
⚪ Remove

Go

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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) ⋯

		Last Name ∧	First Name	Birth Date	Family Relationship	Marital Status	Print PDF List or Labels
☑							Export Individuals to CSV
☑		Adams	George	02/24/1980	Husband	Married	Mass Edit
☑		Adams	Julie	02/24/1980	Wife	Married	Add or Remove from Groups
☑		Adams	Peg	02/24/1996	Daughter	Single	Send Email/Text/Voice
☑	LA	Adams	Louisa	02/08/1944	Wife	Married	Assign/Log Interactions

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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.

Deceased

| Any |
| Not Deceased |
| Deceased |
| Any |

In Group(s)   ☐ Show Archived Groups

Not In Group(s)   ☐ Show Archived Groups

×Z - Keep in Database

⚪ Any Of The Selected Groups   🔘 All Of The Selected Groups
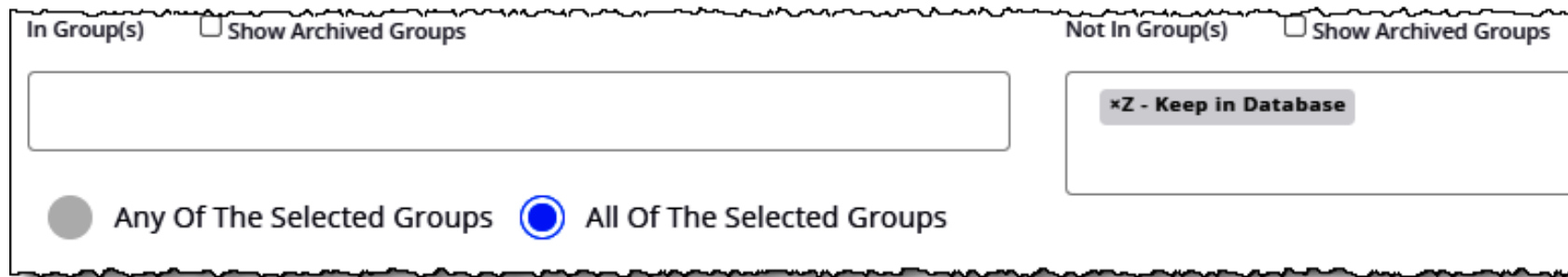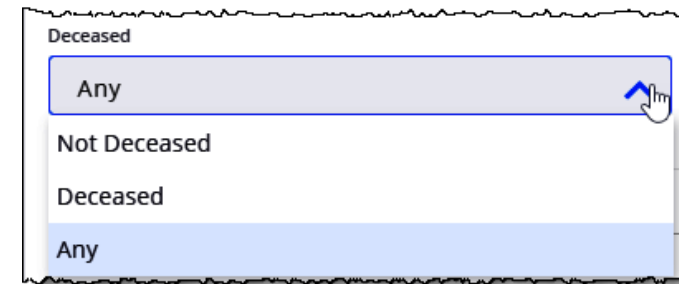
Giving: Finding Individuals with families who are no longer Giving or Attending

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'.

Take action on

These Individuals ⌄

Group   Show Archived   Join Date
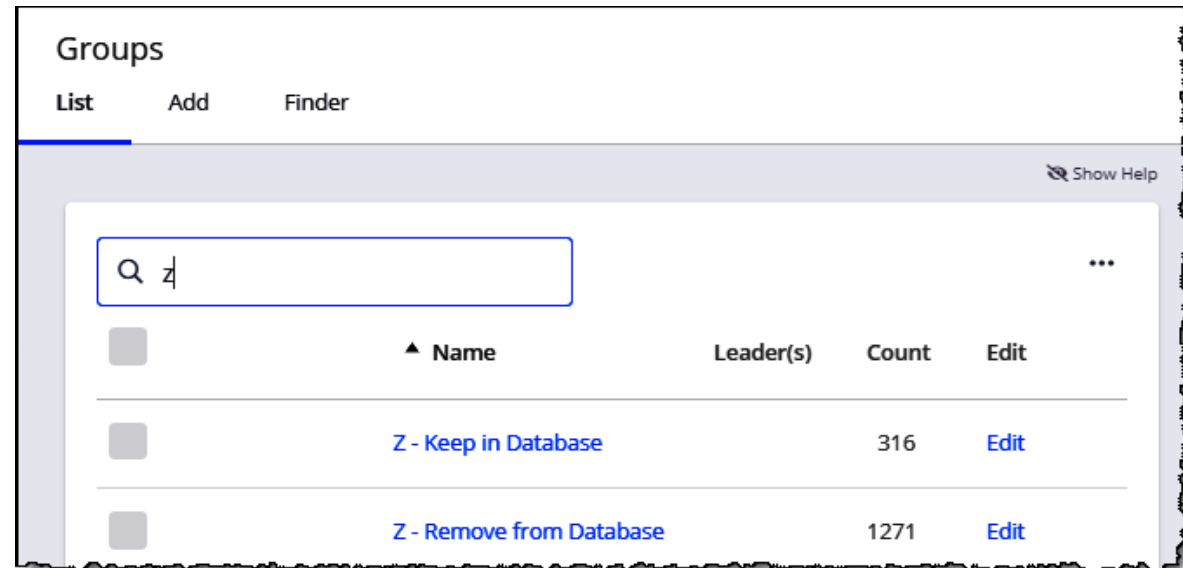
Z - Remove from Database ✖

🔵 Add Selected Individuals As Active

⚪ Add As Inactive

⚪ Remove

Go

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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).

Groups

List   Add   Finder

Show Help

🔍 z

•••

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

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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

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

Menu options:
- 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

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Now Including Slides to Download

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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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Virtual Workshops

Virtual Workshops for Spring & Summer!!!!

101 Financial & ChMS Workshops
- 4 days of online classroom instruction, 3 hours each day
- Detailed workbooks, quizzes & discussion included!!!
- Lots of great ideas & skill-building lessons

[Click Here to Register](#)

201 Financial & ChMS Workshops
- Beyond the basics, for the customer who is already using Financials or ChMS
- Multiple classes available; sign up for as many as you like!
- Detailed workbooks, quizzes & discussion included!!!

Coming Soon!!!

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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

MPower University

MinistryOne