SHELBYSYSTEMS®

Advance Your Knowledge Webinar Series

Maximize the Connection Between Your ChMS and Your Website

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.

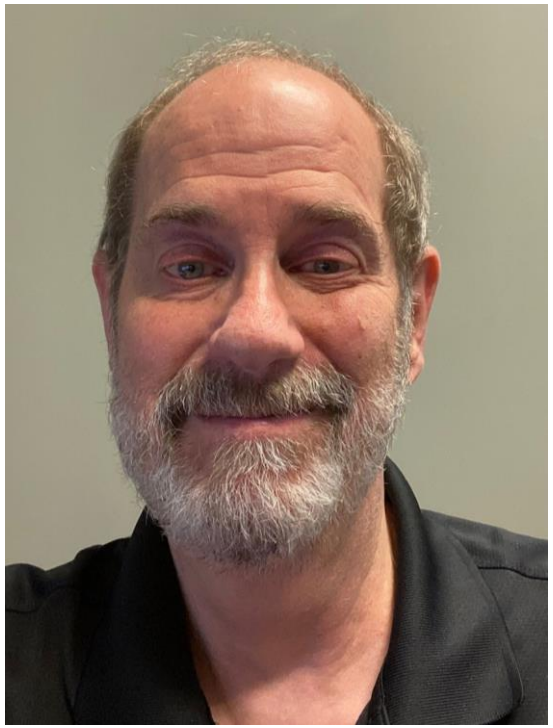
Welcome—Introducing our Panelists

Dan Star

Client Consultant
Web/Mobile

Bill Ballou

Shelby Training Manager



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Shelby Next

- Giving Forms
- Membership (ChMS)
- Website

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Quick Poll

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Forms

- ❑ Volunteer Interest
- ❑ Registrations
- ❑ Giving
- ❑ Mission Trips

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Shelby Next

Giving Forms

Membership (ChMS)

Website

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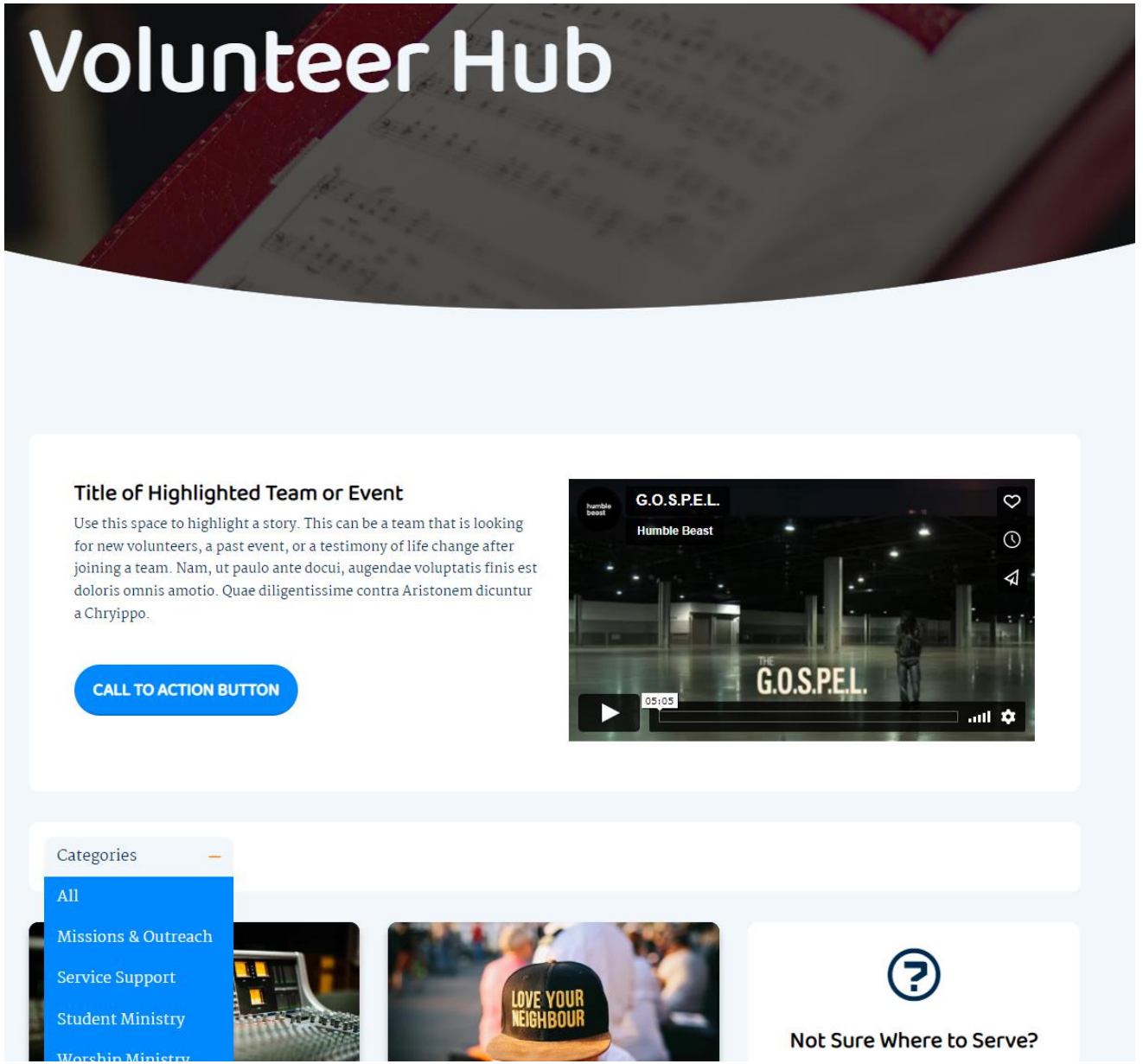
Volunteer #2 Premium Layout



- Layout Demo

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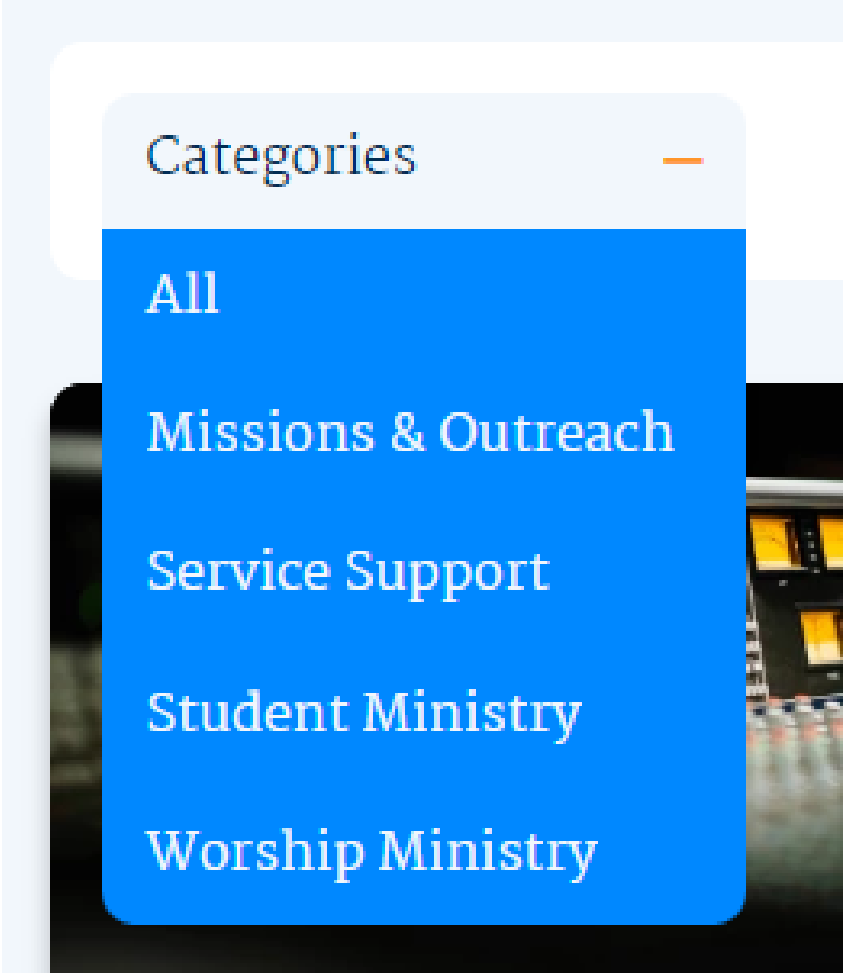
Volunteer #2 Premium Layout

- Identify categories for users to filter by



[Setup guide for Volunteer #2]

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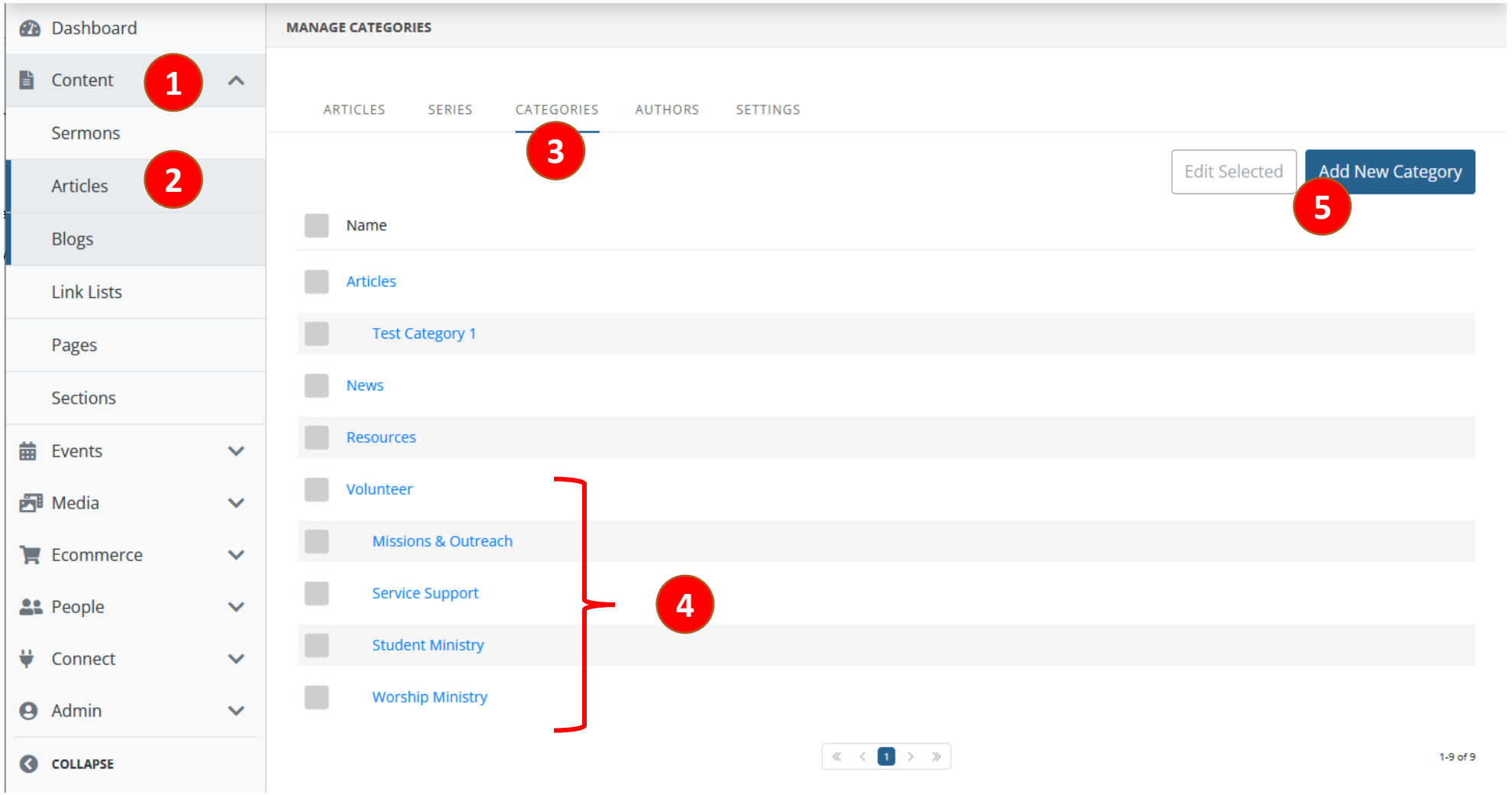
Build Your Categories



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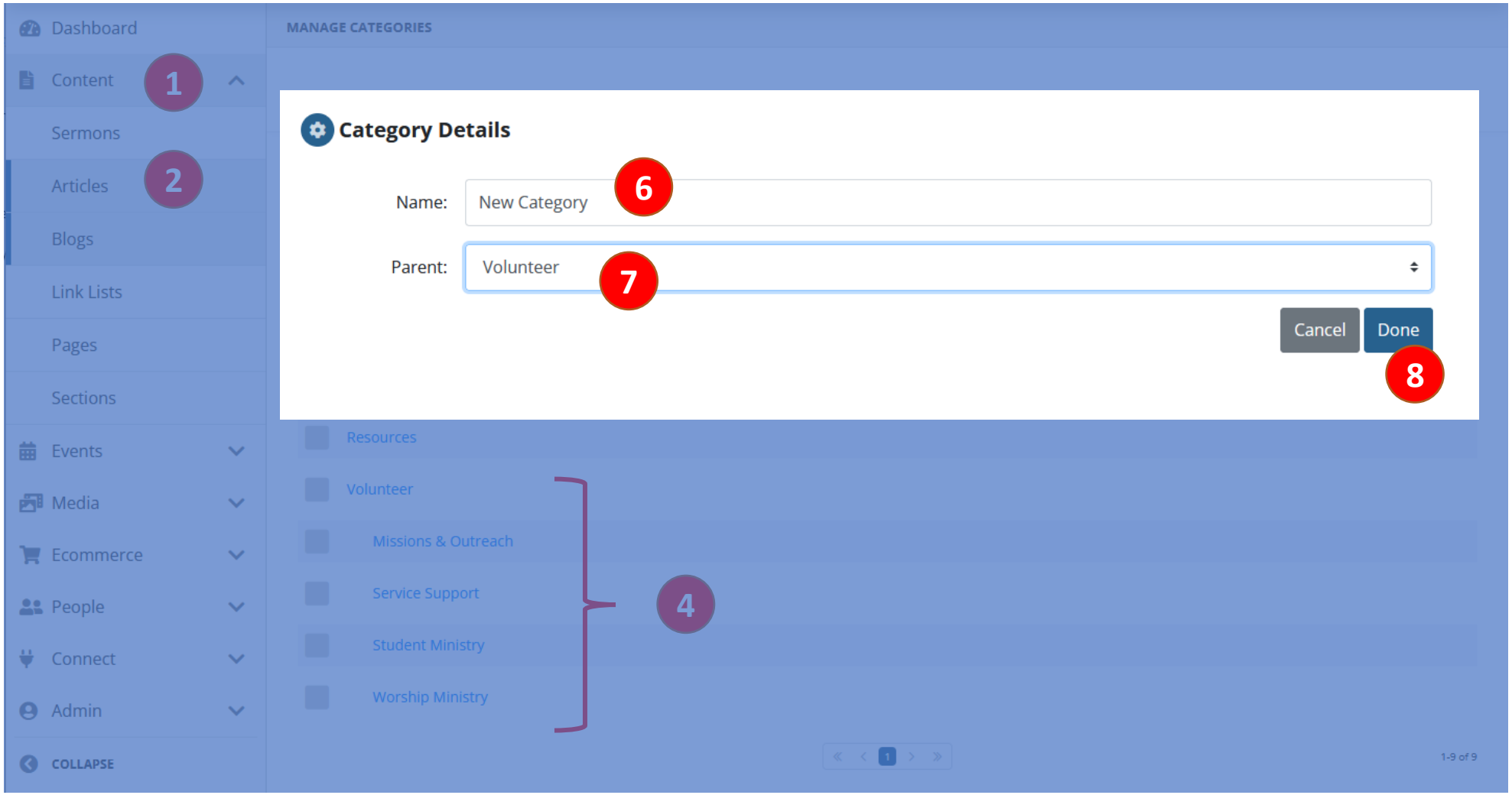
Build Your Categories



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Giving Forms

Membership (ChMS)

Website

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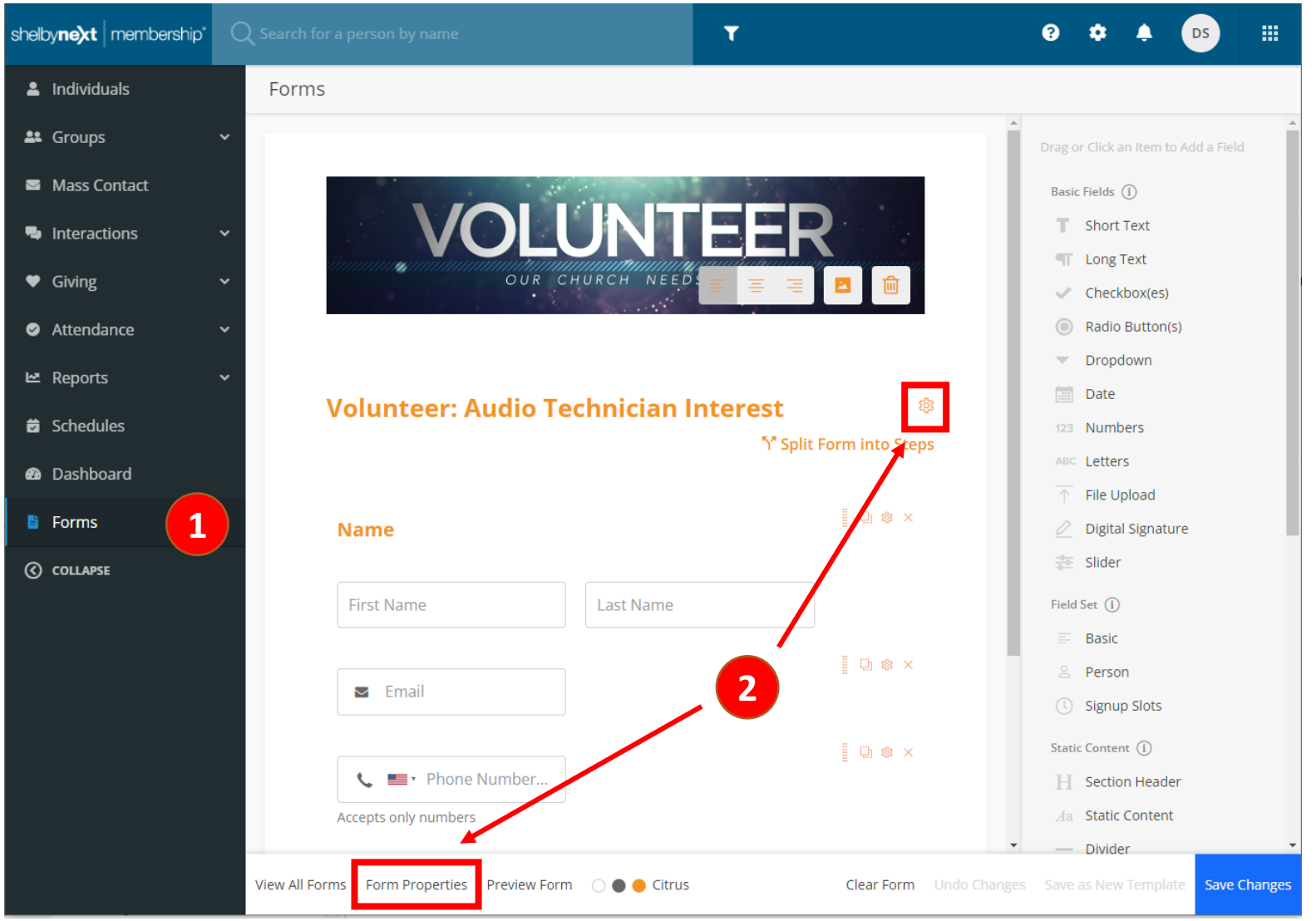
Build Forms

Membership or Giving

1. Forms
2. Form Properties

[Good info on creating Forms]



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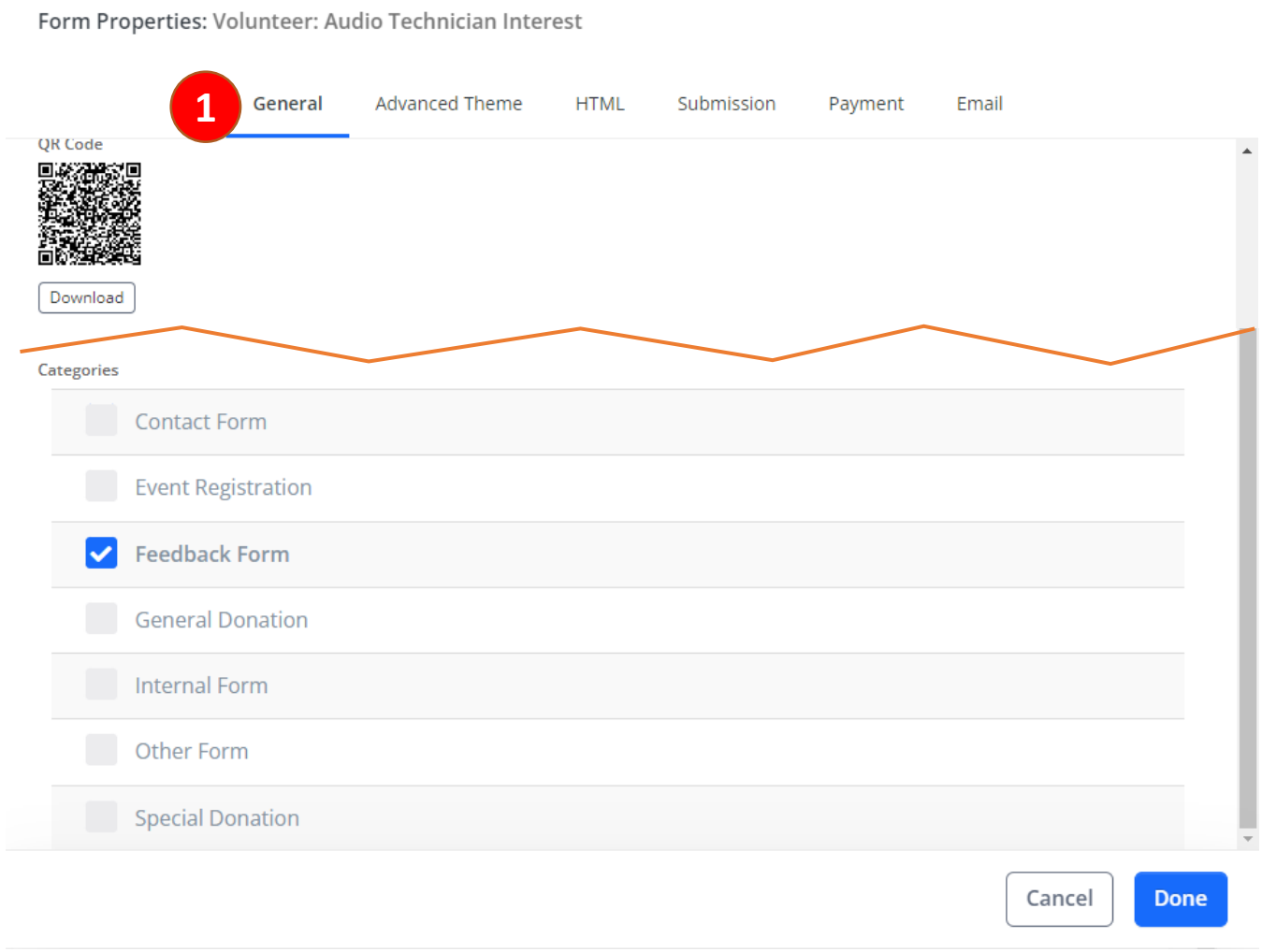
Form Properties

1. Categorize forms under **General**
   - Feedback Form
   - Other Form



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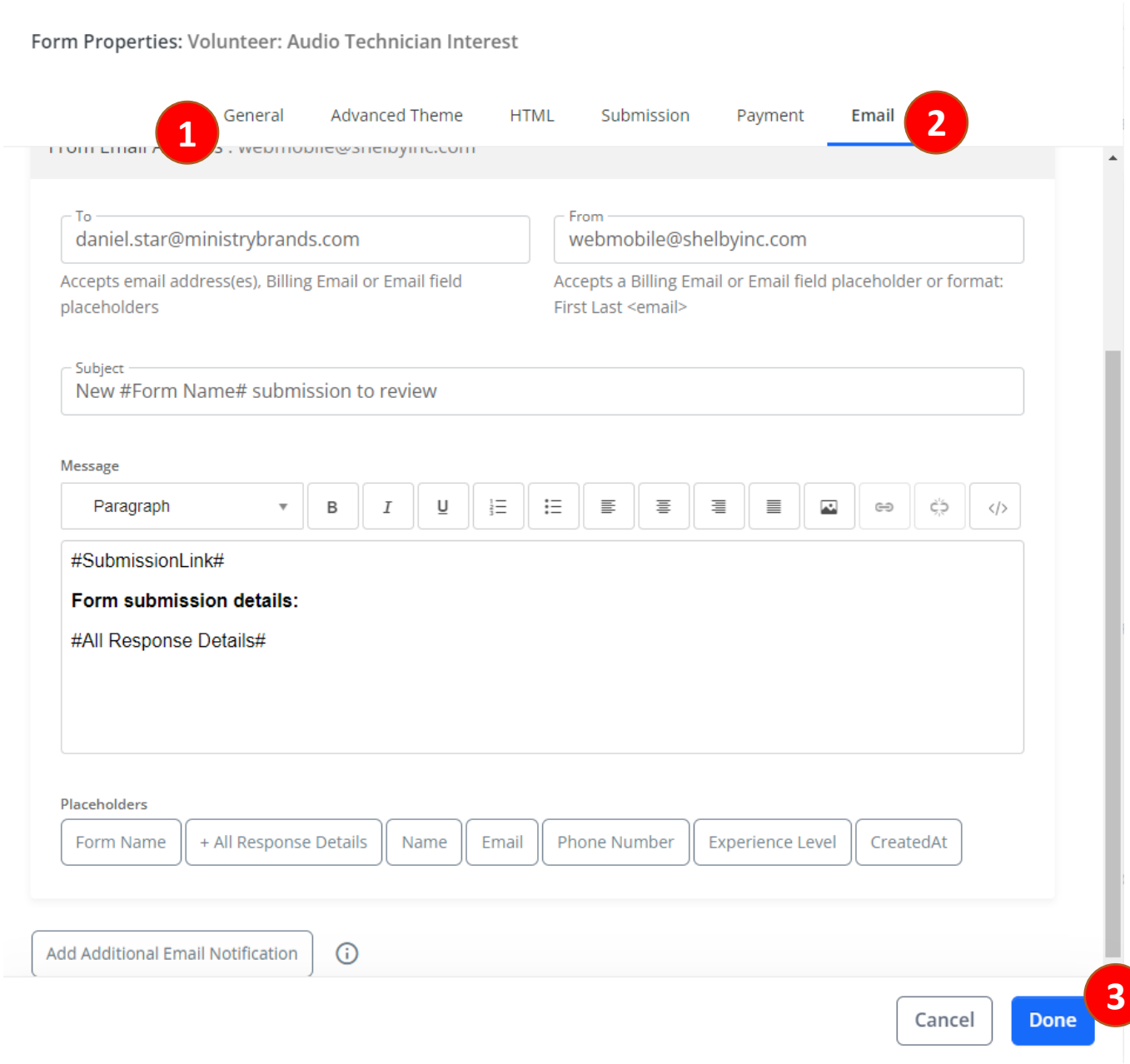
Form Properties

1. Categorize forms under **General**
   - Feedback Form
   - Other Form
2. Set Email Notification for Phase 1 *(until Phase 2 is created)*
3. Done



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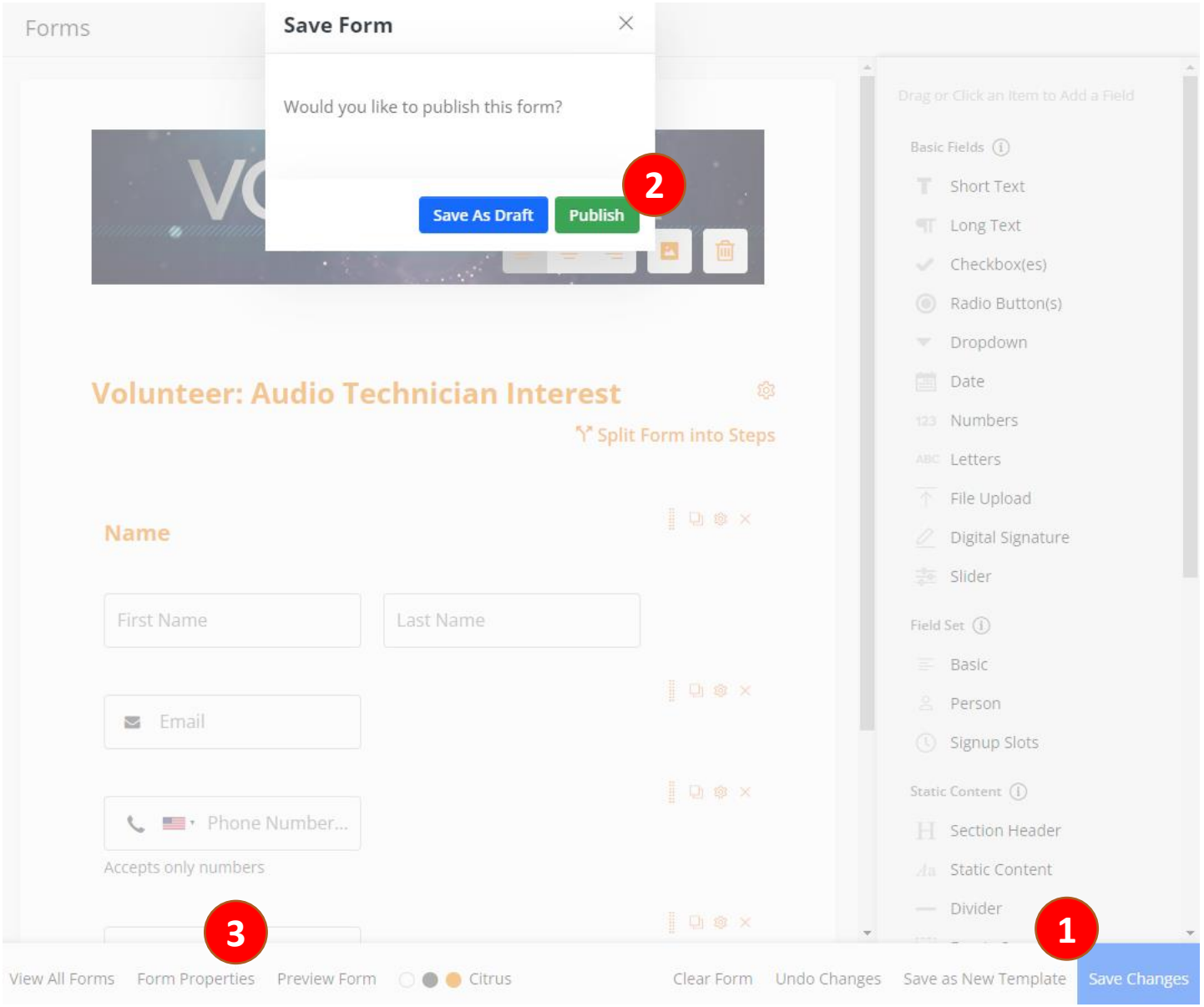
Publish

1. Save Changes
2. Publish
3. Get Embed Code
   - Form Properties



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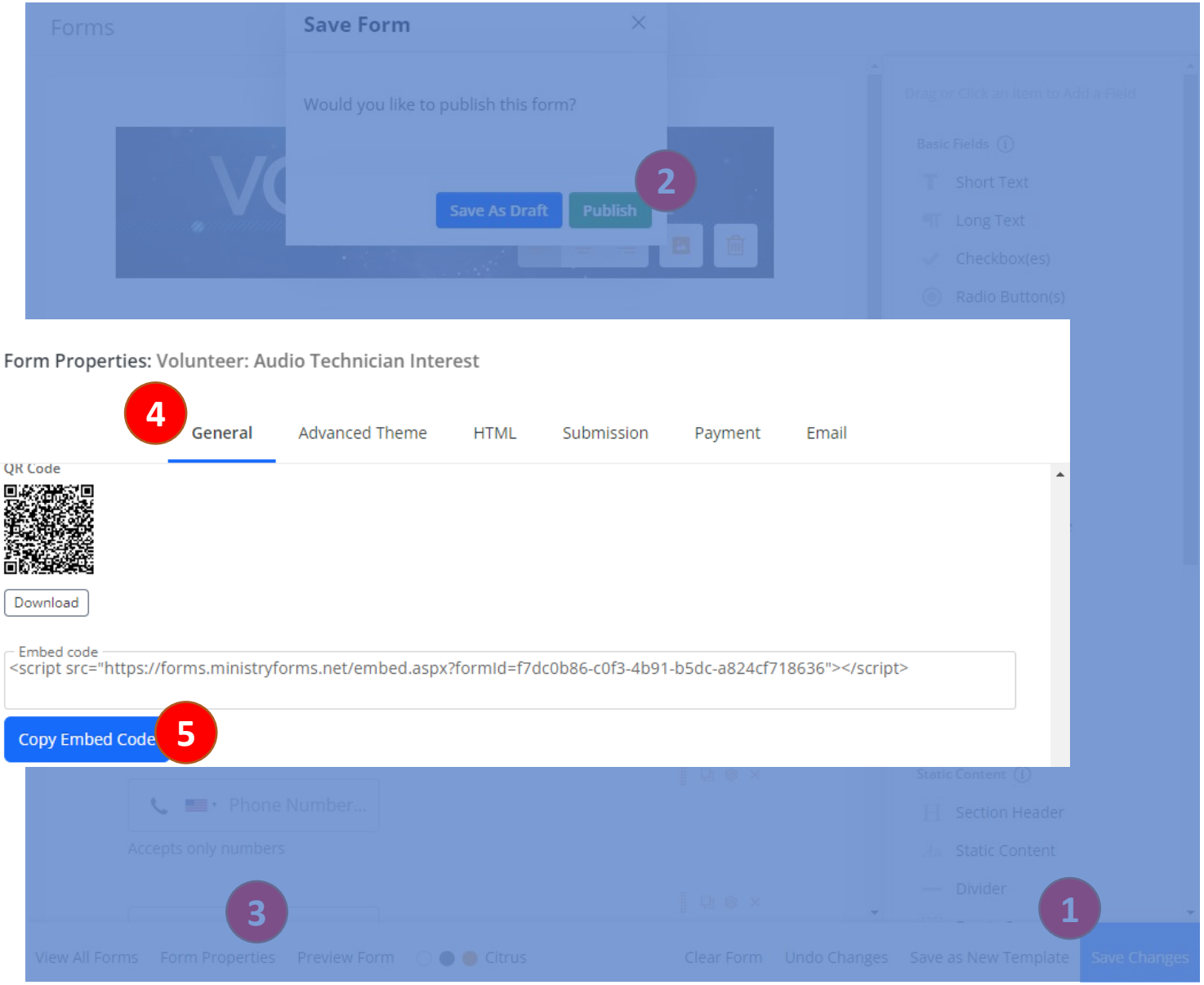
Publish

1. Save Changes
2. Publish
3. Get Embed Code
   - Form Properties
4. General
5. Copy Embed Code



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Shelby Next

Giving Forms

Membership (ChMS)

Website

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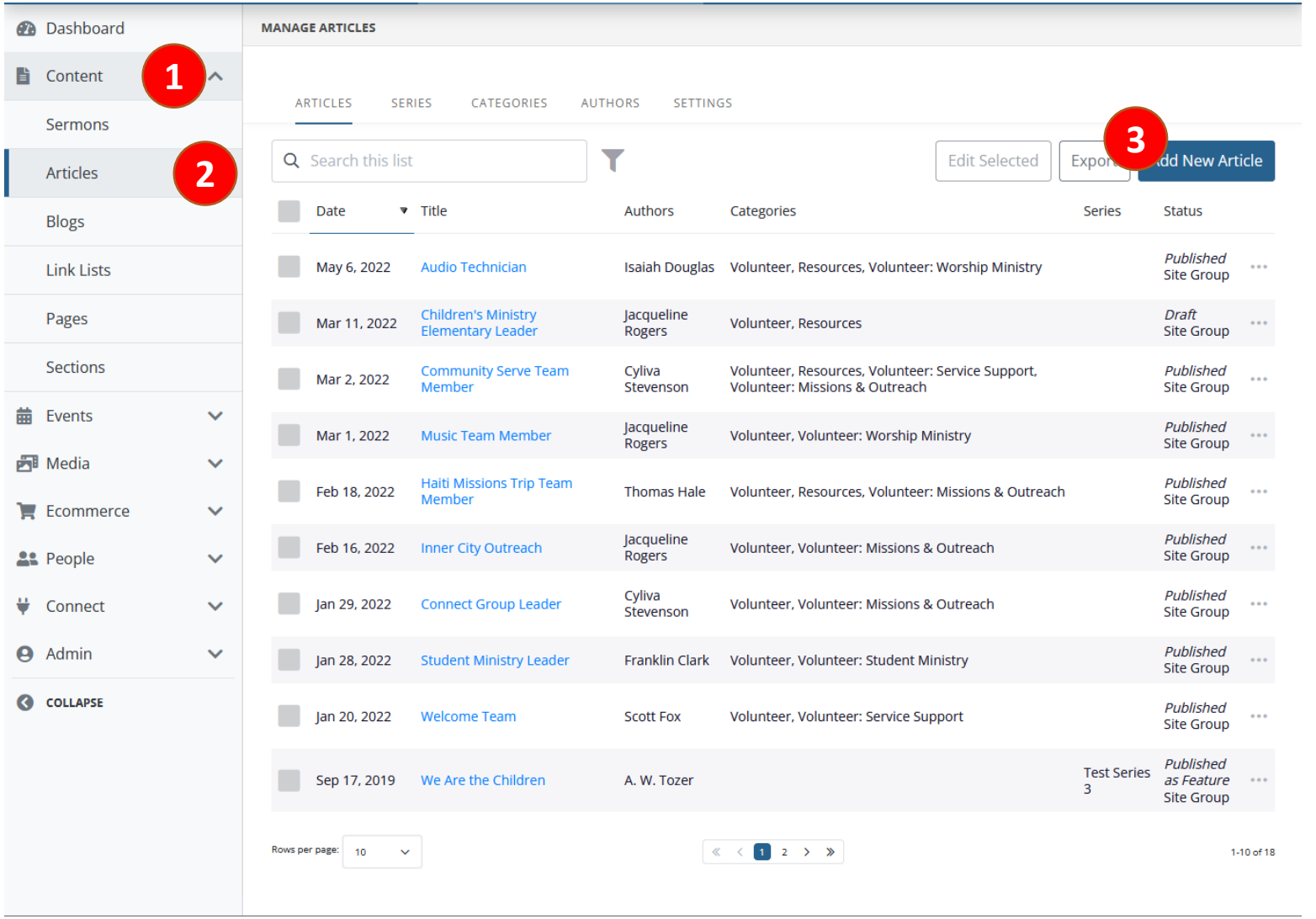
Add Volunteer Articles

1. Content
2. Articles
3. Add New Article



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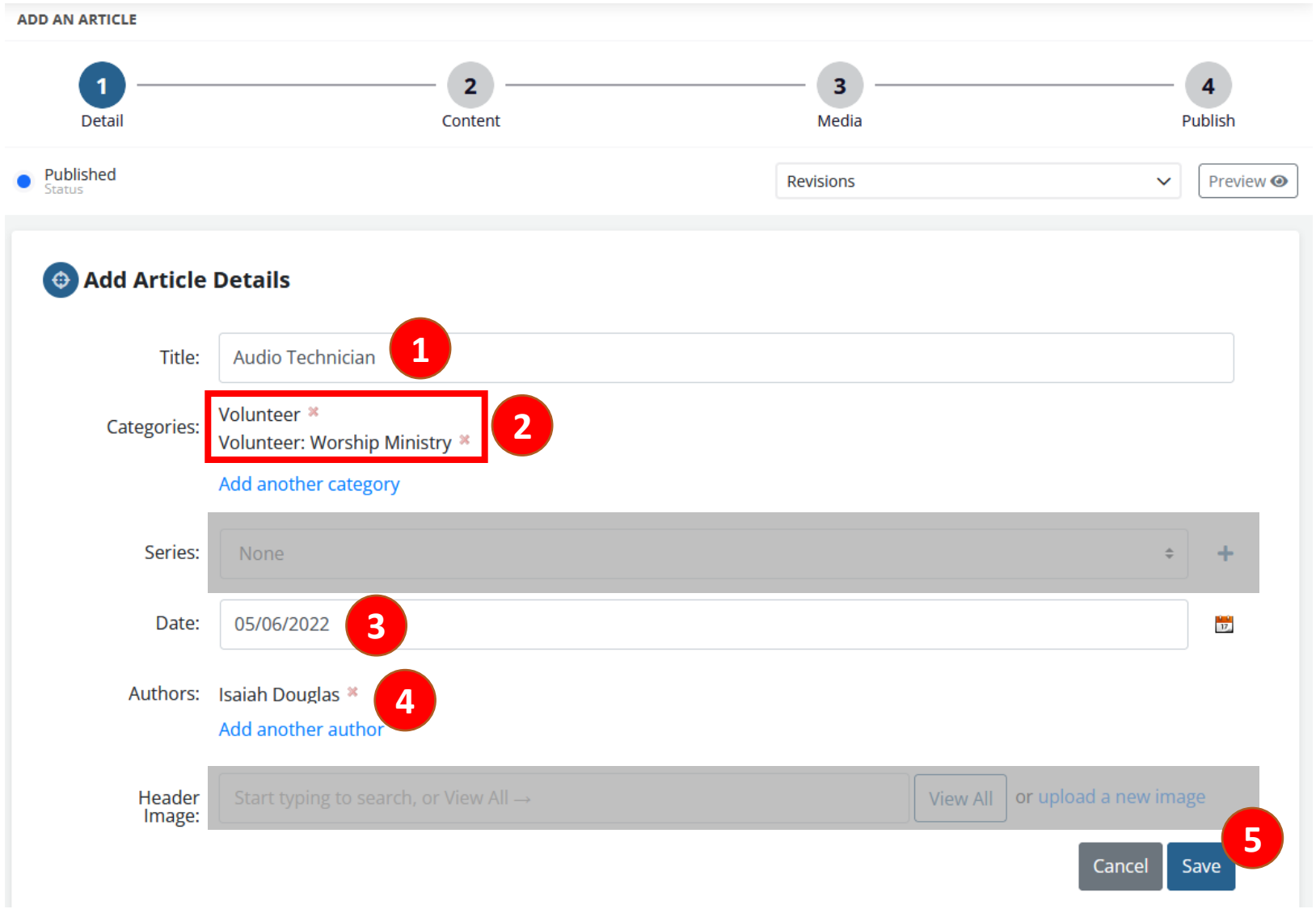
Add Volunteer Articles

Page 1

1. Title
2. Categories:
   - Volunteer
   - Sub-category
3. Date
4. Author
5. Save



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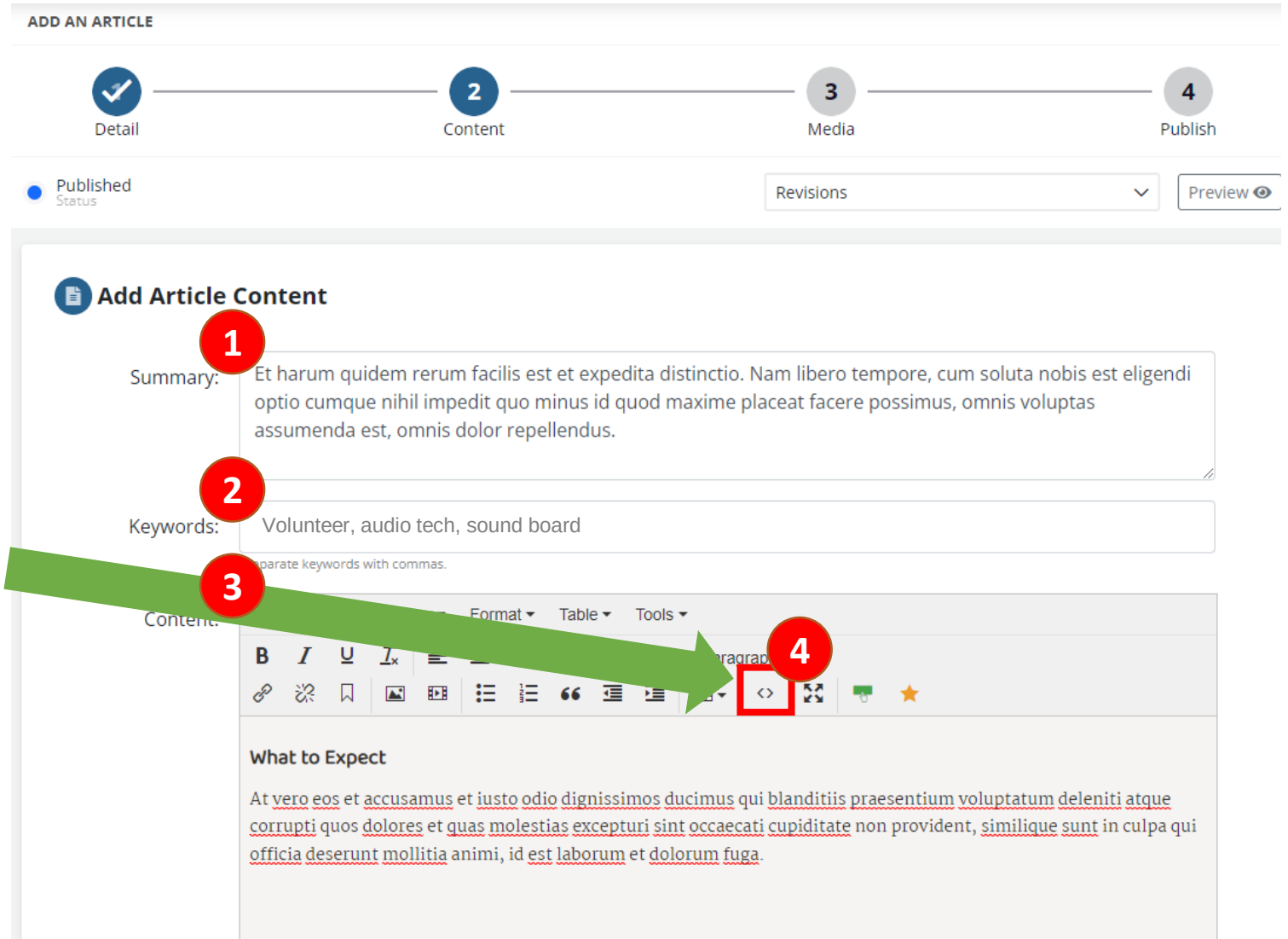
Add Volunteer Articles

Page 2

1. Summary
   Preview Text
2. Keywords
3. Content
   Enter Description
4. Source Code Icon



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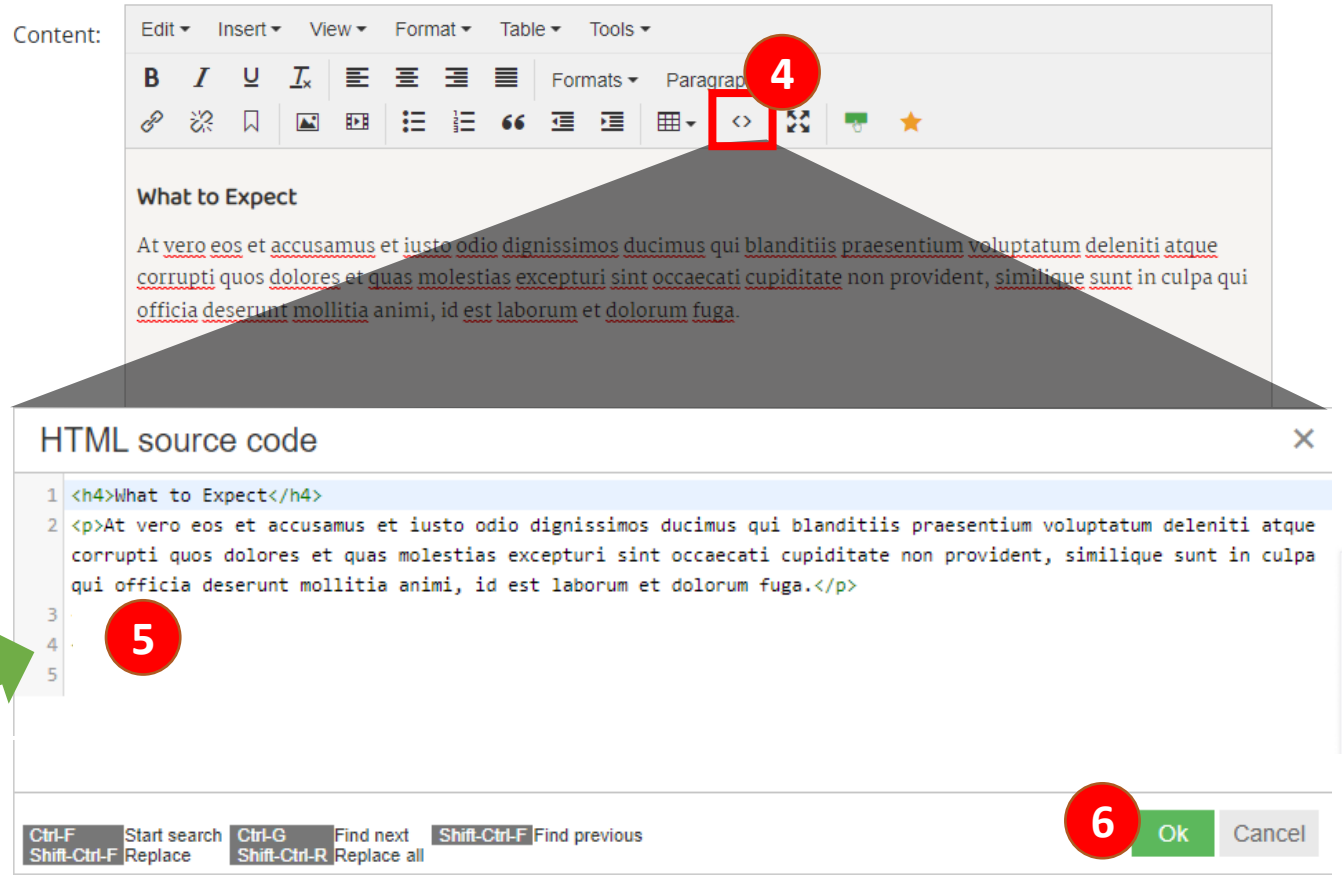
Add Volunteer Articles

Page 2

1. Summary
   Preview Text
2. Keywords
3. Content
   Enter Description
4. Source Code Icon
5. Paste Embed Code
6. Click OK



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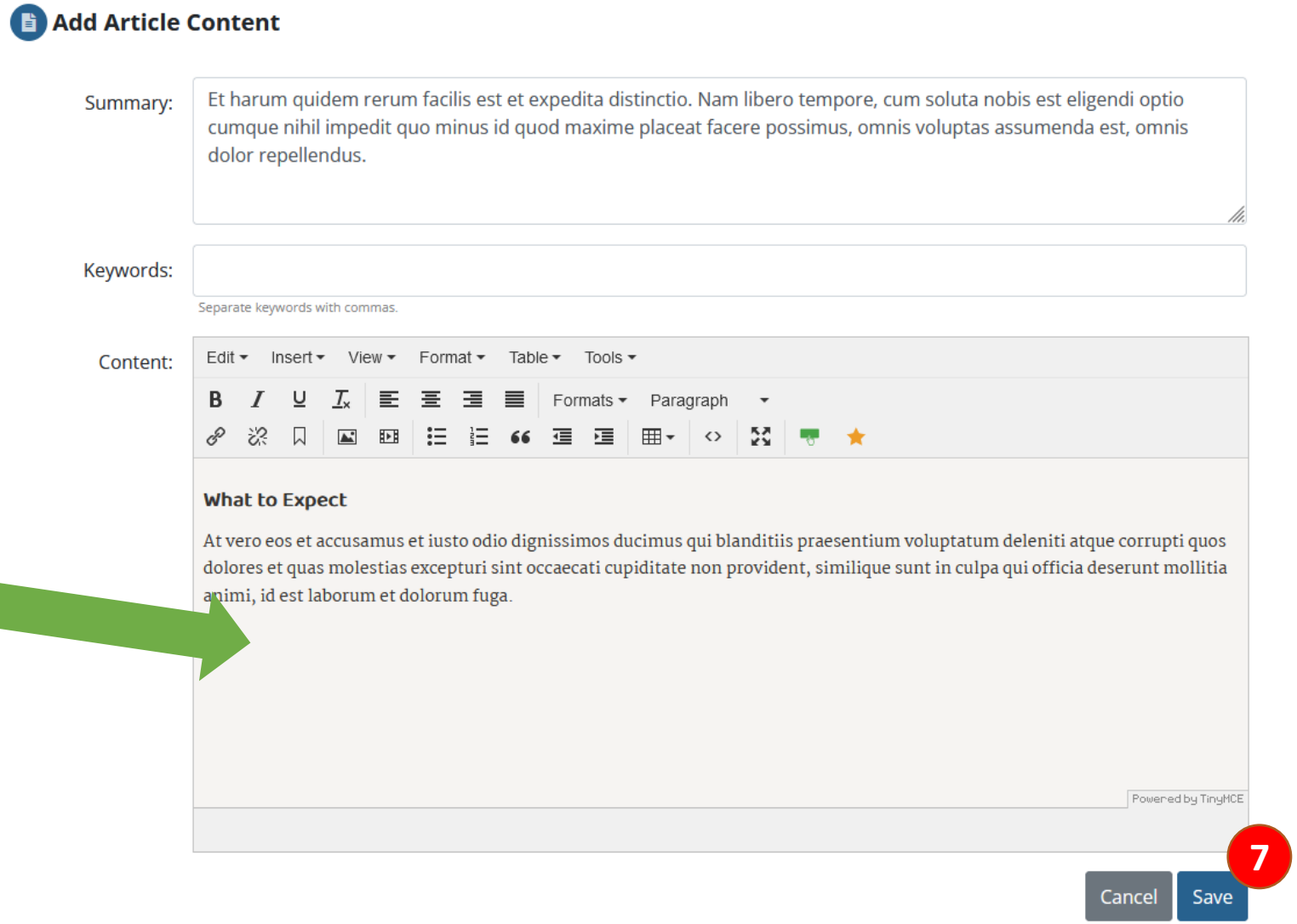
Add Volunteer Articles

Page 2

NOTE: The embedded form will not appear in the WYSIWYG editor. *Only on a live page.*

7. Save



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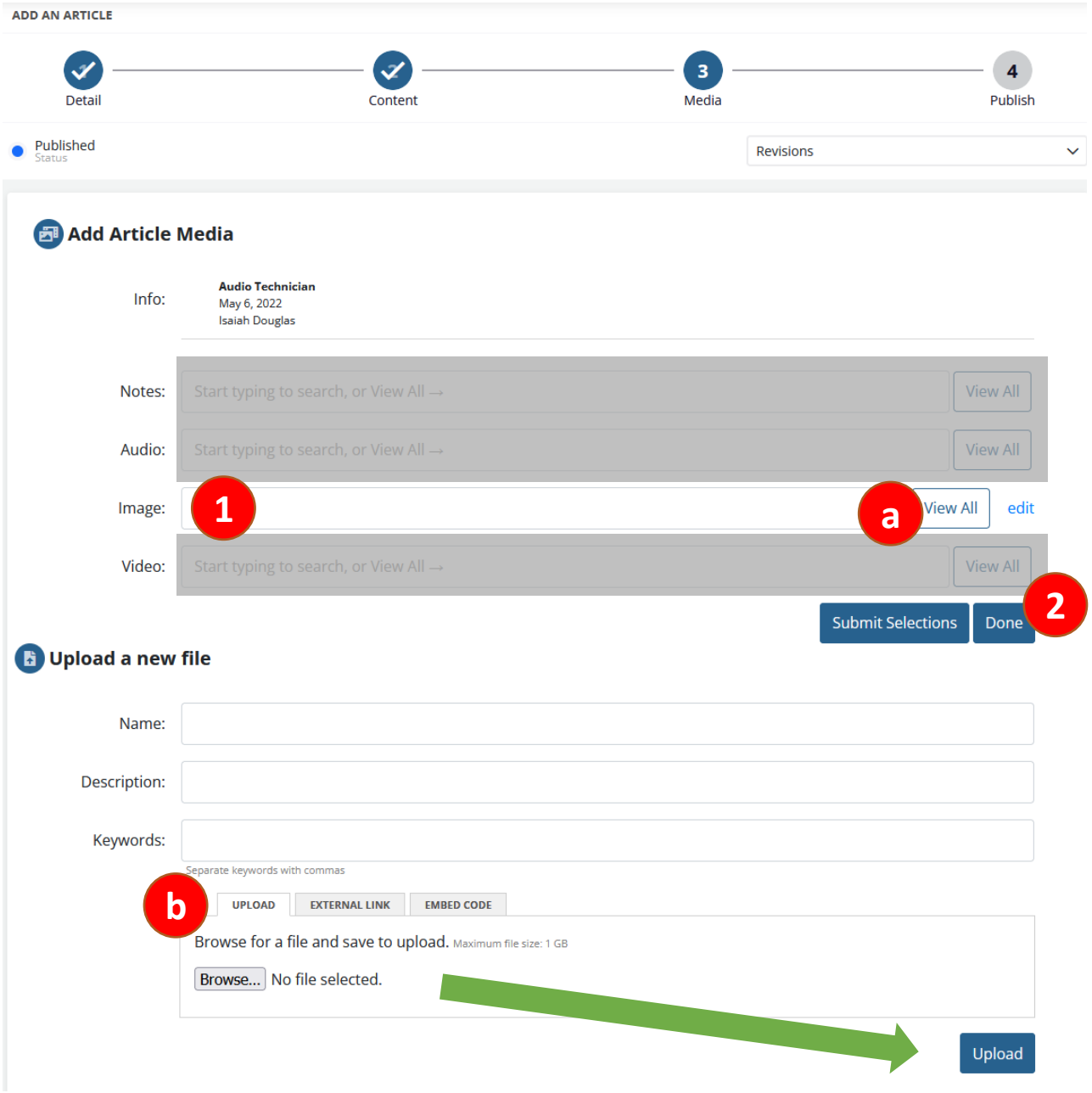
Add Volunteer Articles

Page 3

1. Add Image
   a. Select from media
      - View All
   b. Upload new file
      - Browse & Upload
2. Done



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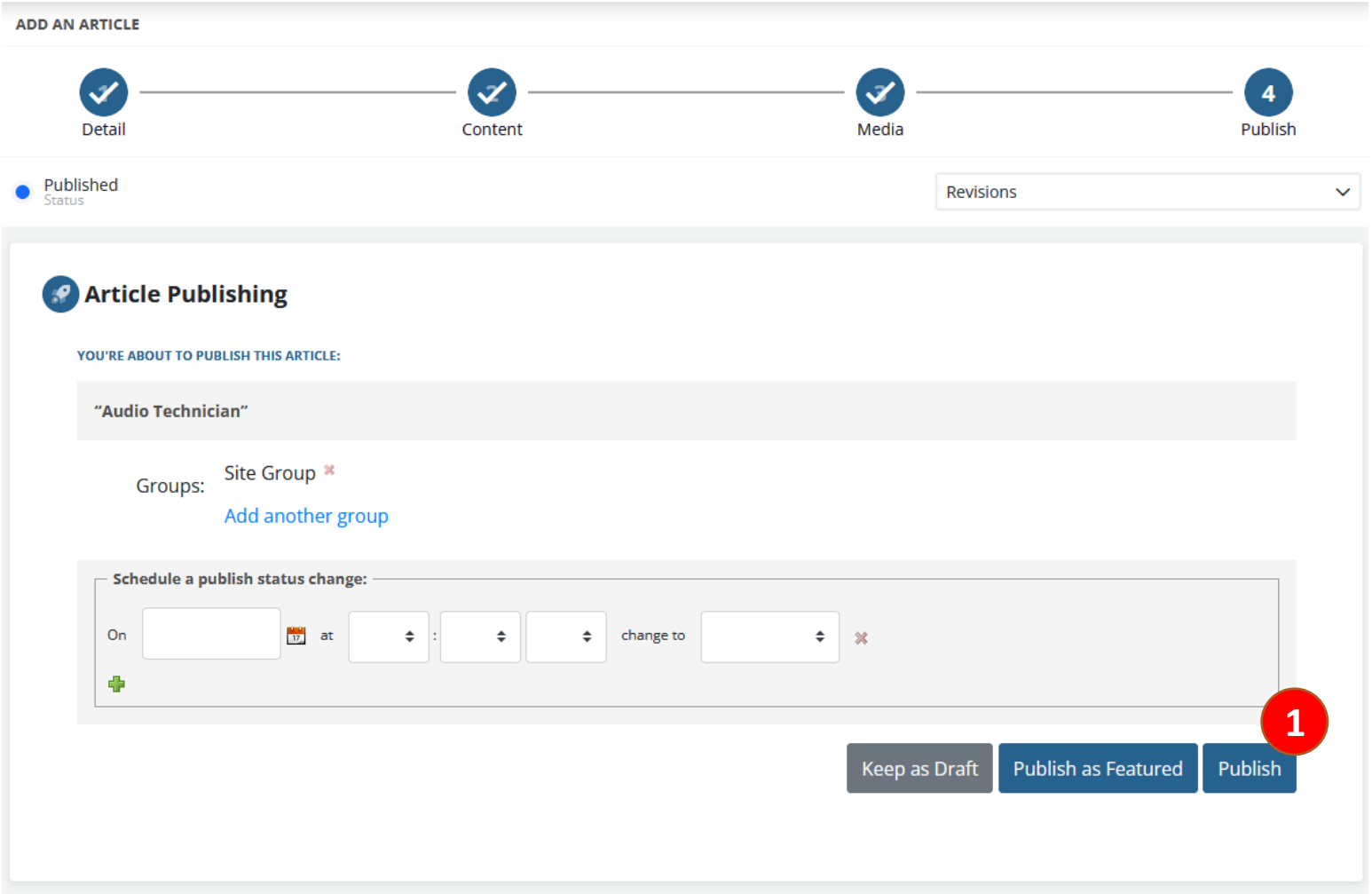
Add Volunteer Articles

Page 4

1. Publish



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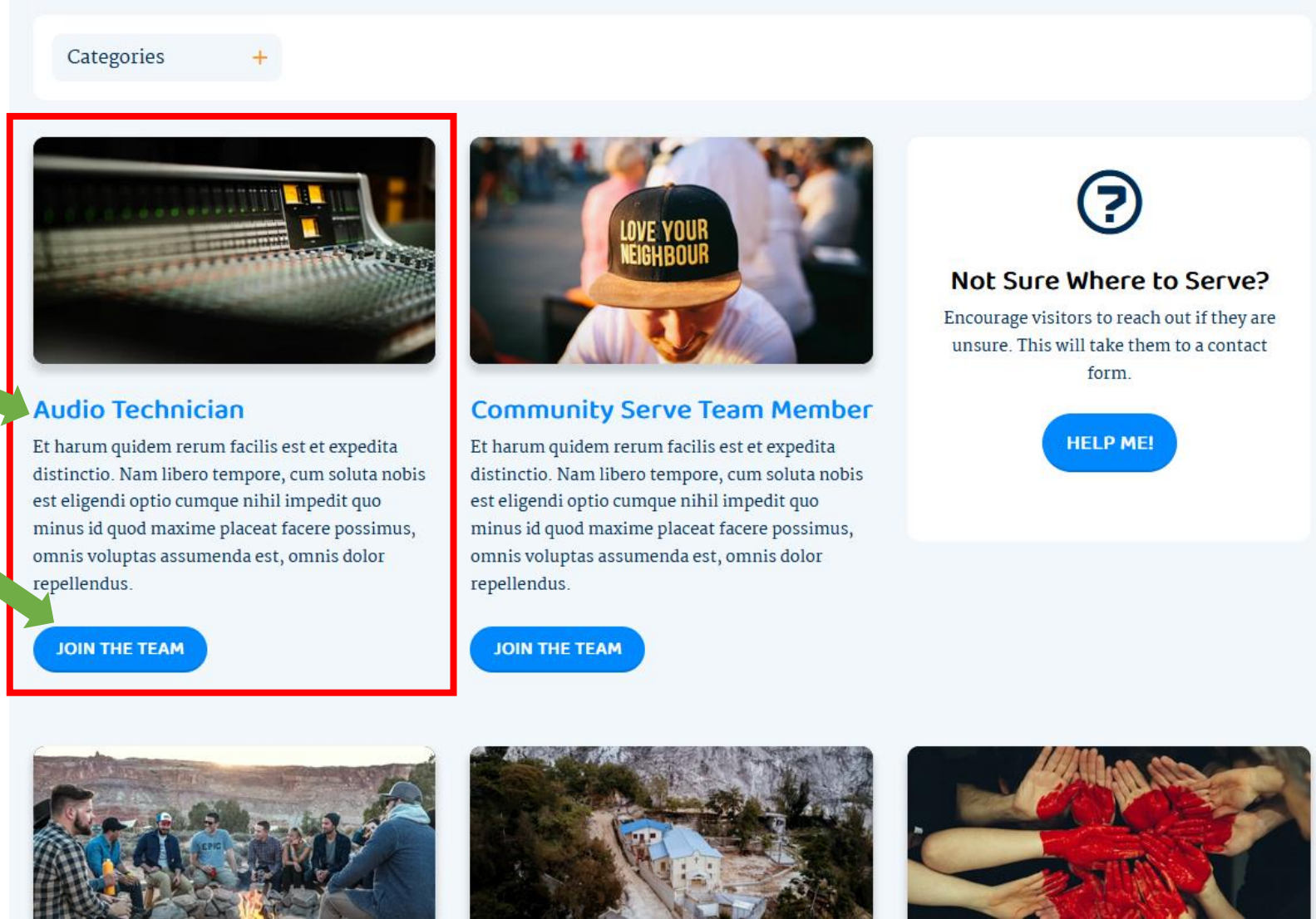
View Article

- Preview Text
- Detail with Embedded Form



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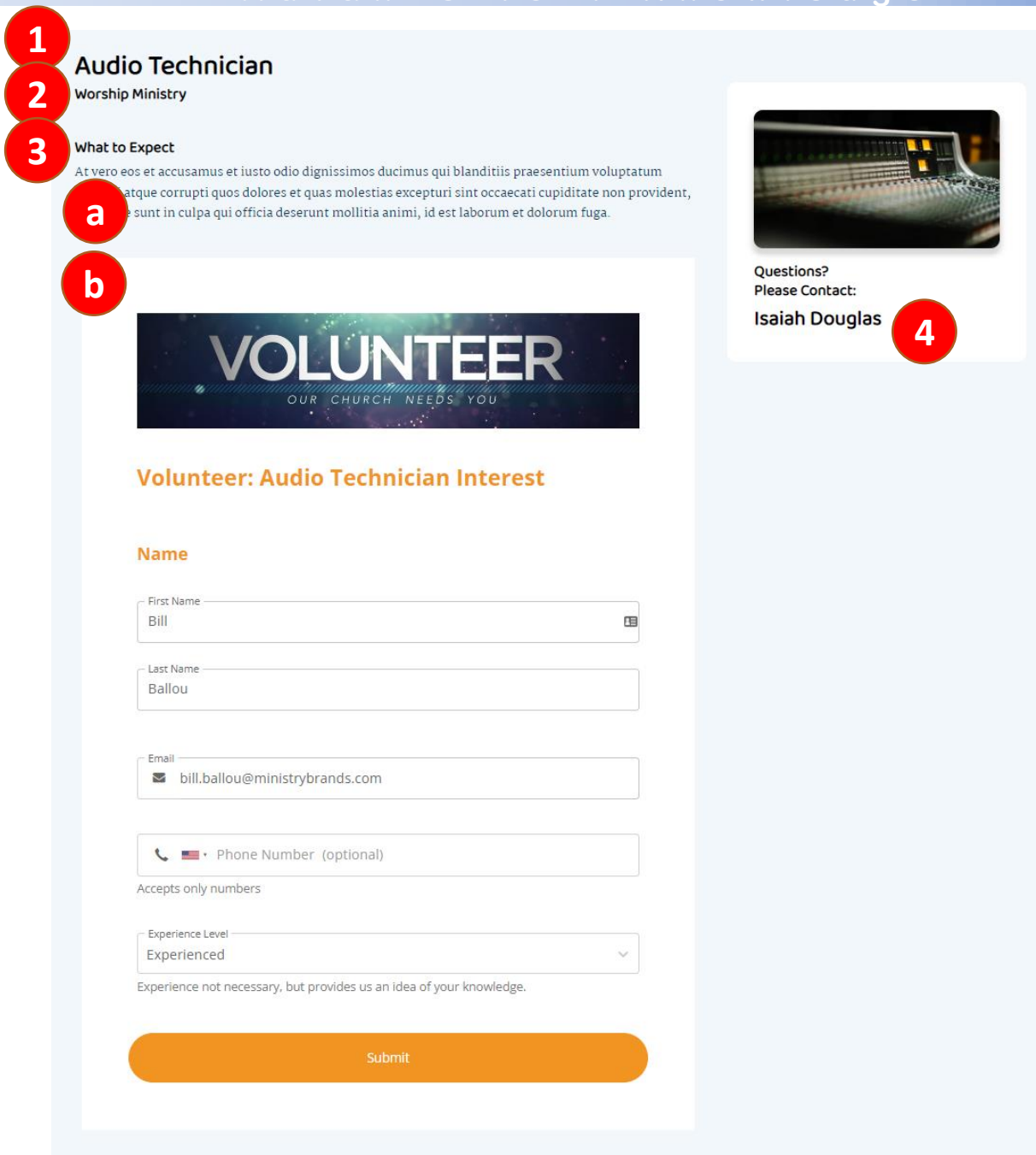
View Article Detail

1. Title
2. Sub-Category
3. Content
   a. Description
   b. Embed Code Form
4. Contact



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Shelby Next

Giving Forms

Membership (ChMS)

Website

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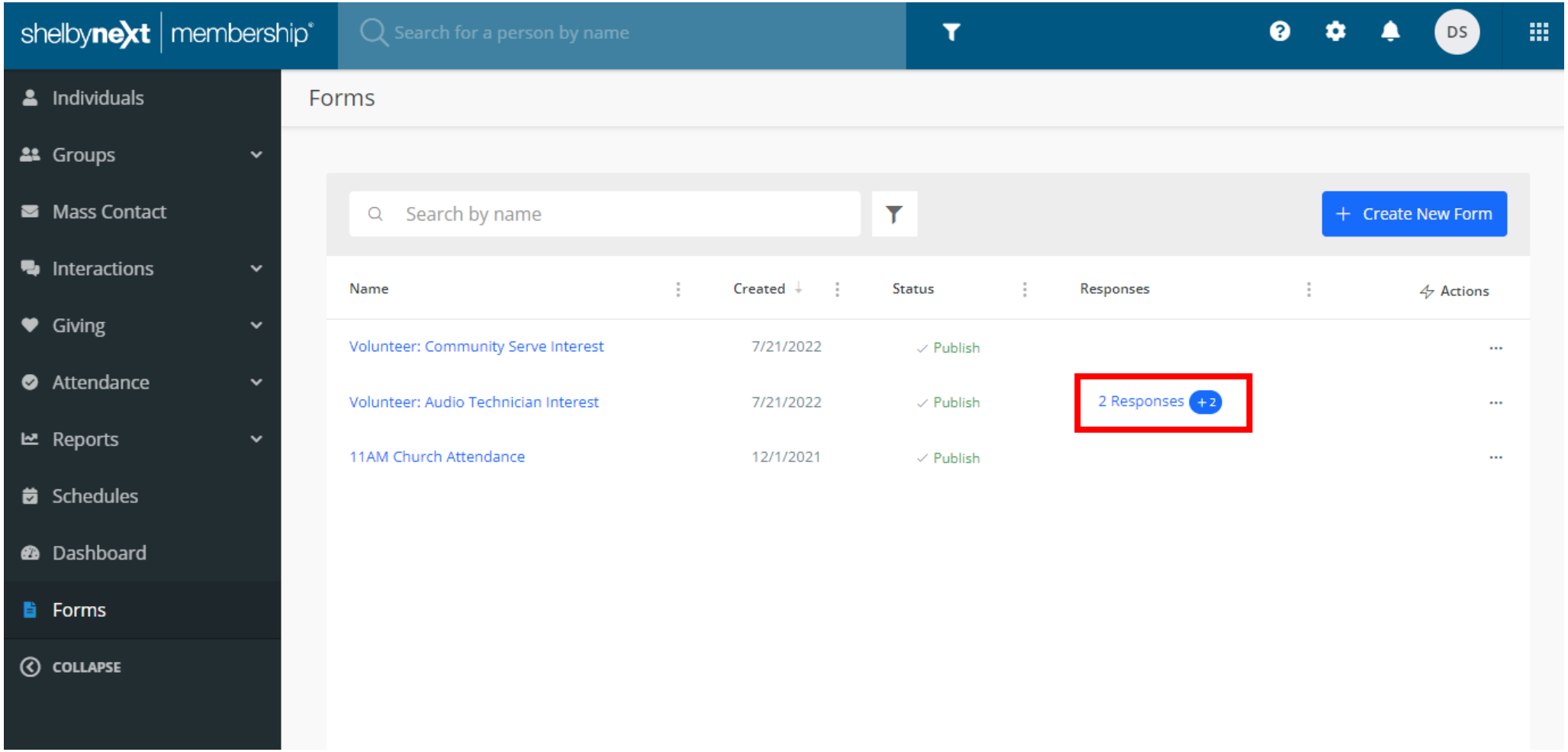
Review Submissions



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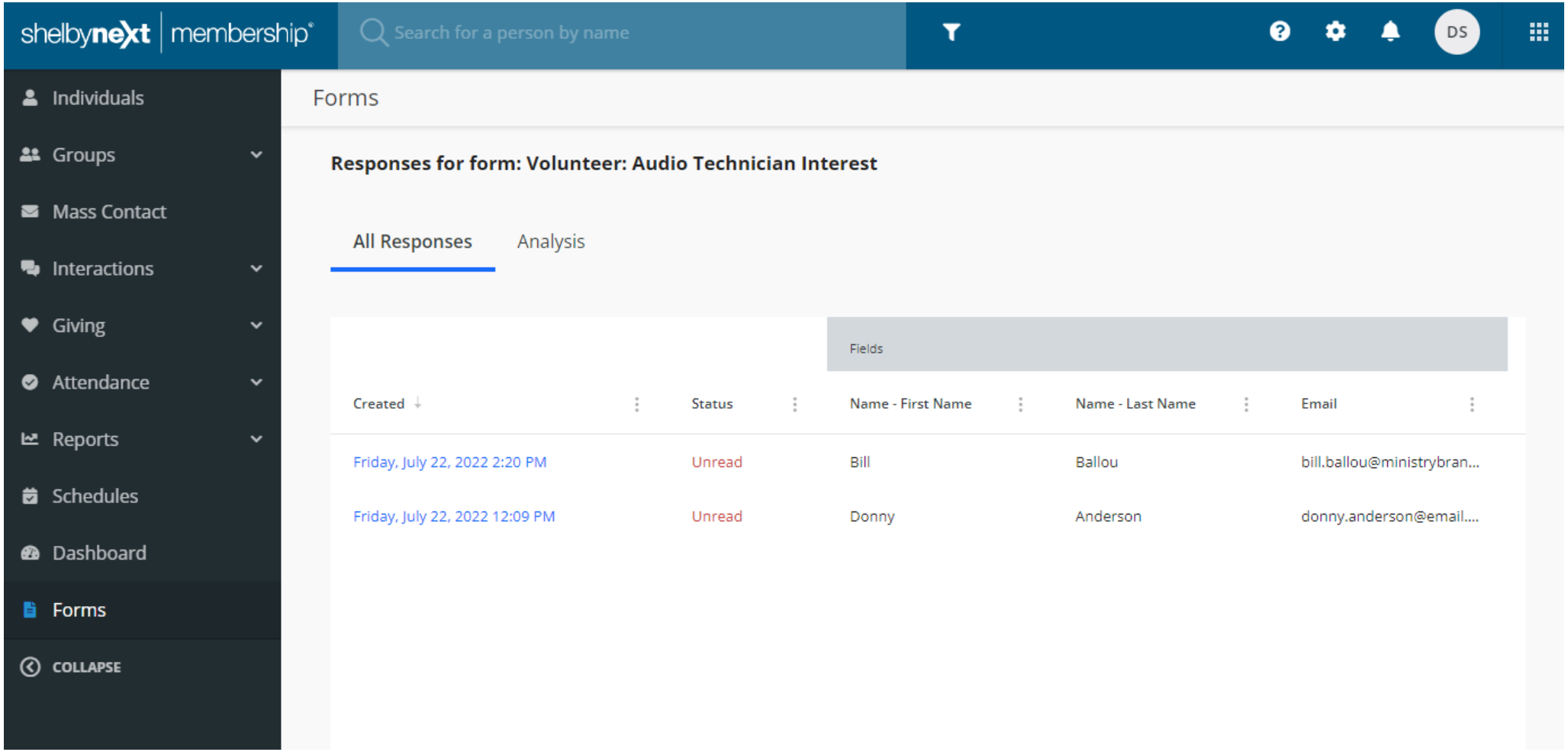
Review Submissions



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Receive Emails

New Volunteer: Audio Technician Interest submission to review

W webmobile@shelbyinc.com <submission@ministryforms.net>
To Dan Star
Retention Policy 90 Day Delete (90 days)

Click here to view the submission

Form submission details:

Name - First Name	Bill
Name - Last Name	Ballou
Email	bill.ballou@ministrybrands.com
Phone Number	
Experience Level	Experienced
Created At	7/22/2022 2:20:20 PM

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Review Phase 1

Giving Forms

Membership (ChMS)

Website
CMS

Website
Live Site

Build Form

- Save
- Publish
- Copy Embed Code

Build Article

- Paste Embed Code
- Publish

Review
Volunteer Article

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Phase 2

Shelby Next

- Giving Forms
- **Membership (ChMS)**
- Website

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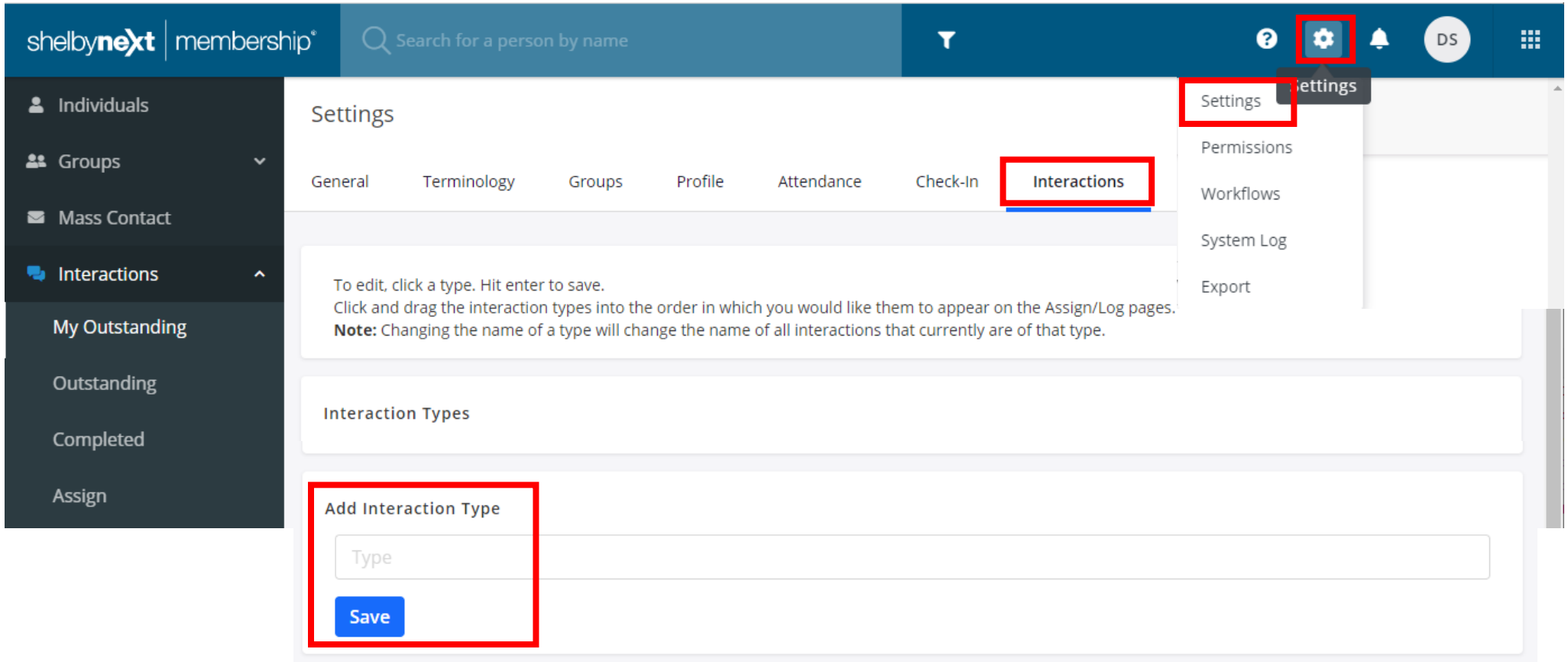
Create Interaction Type

- Administrator
  - Gear Icon > Settings > Interactions

[Interactions]

[More on Interactions]

[Permissions for Interactions]



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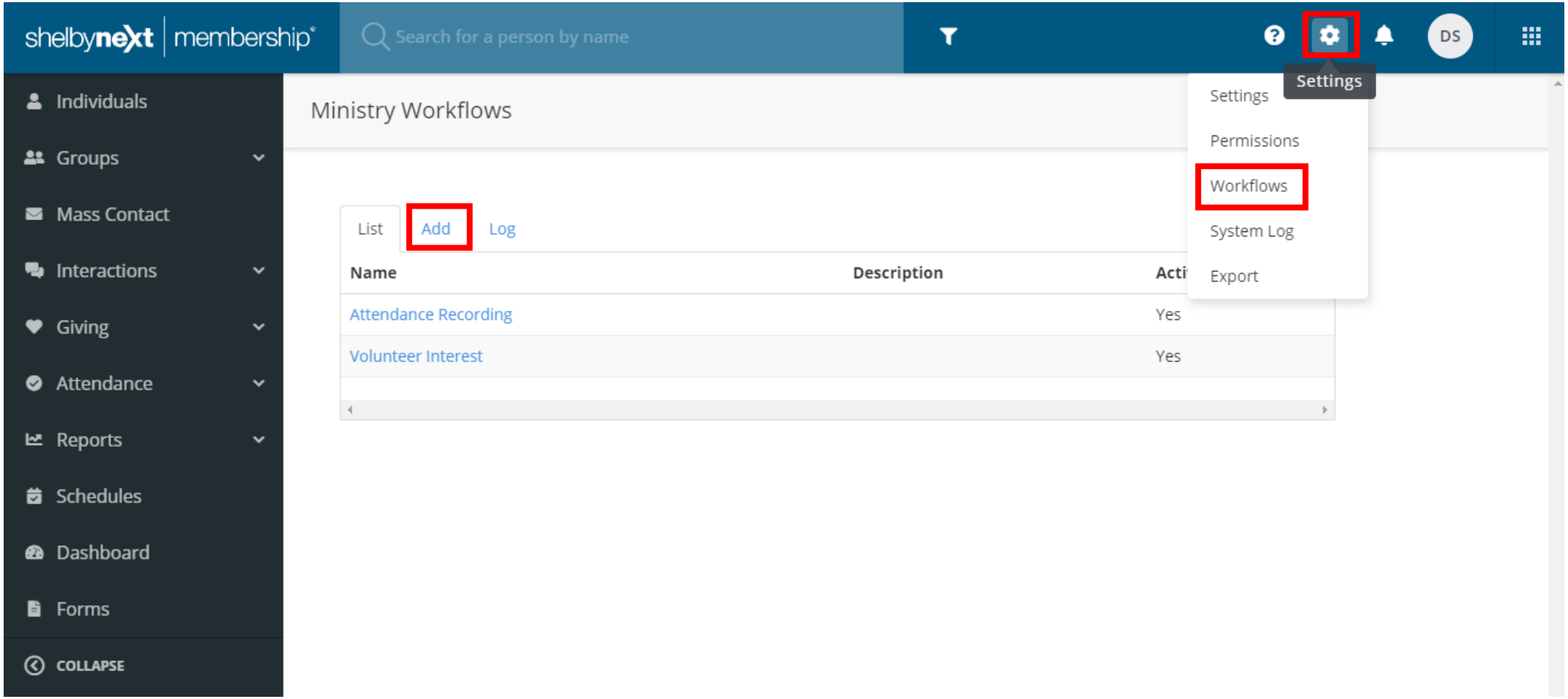
Build Workflows

- Gear Icon > Workflows > Add



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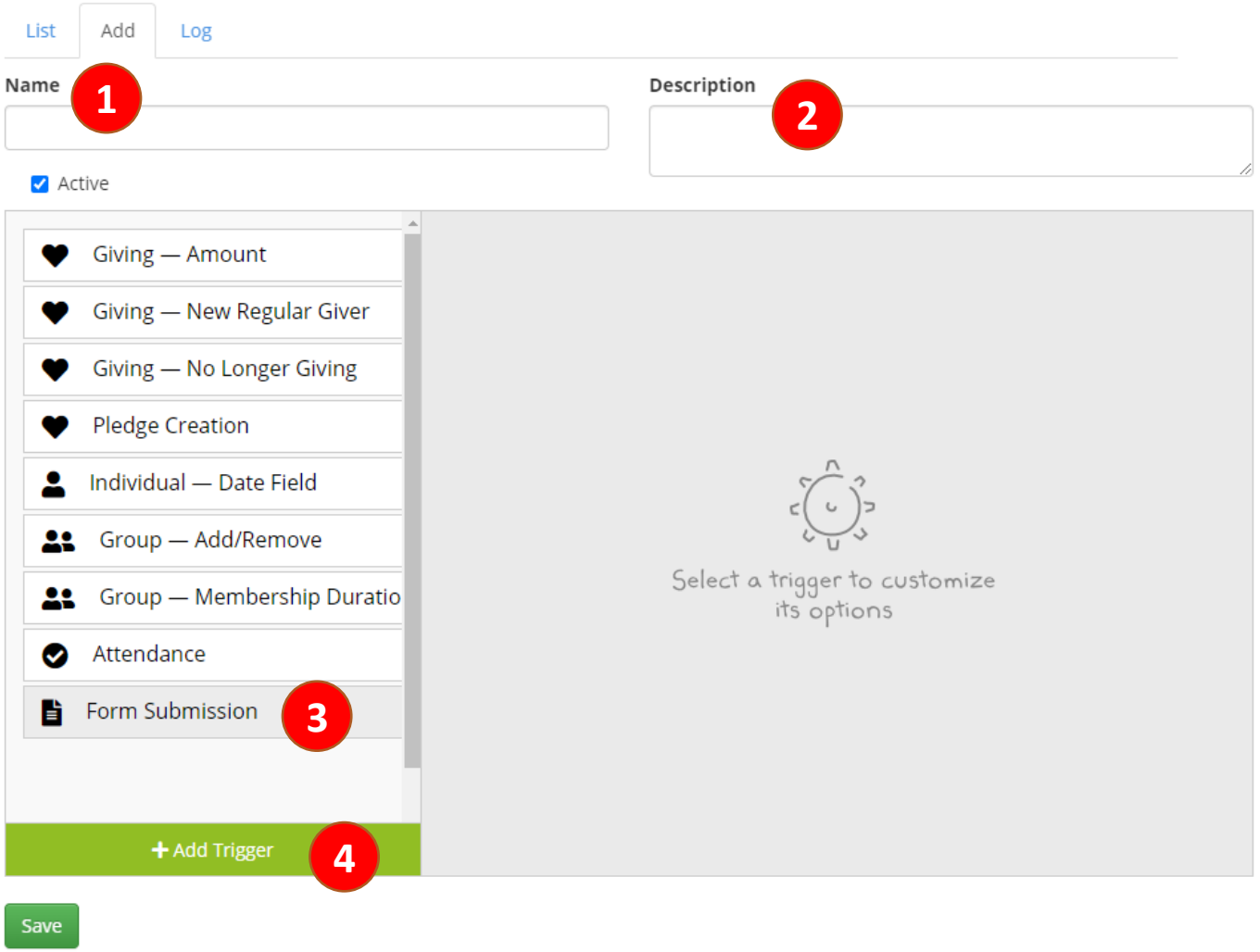
Build Workflows

1. Name
2. Description
3. Form Submission
4. Add Trigger



[Resources on creating Workflows]

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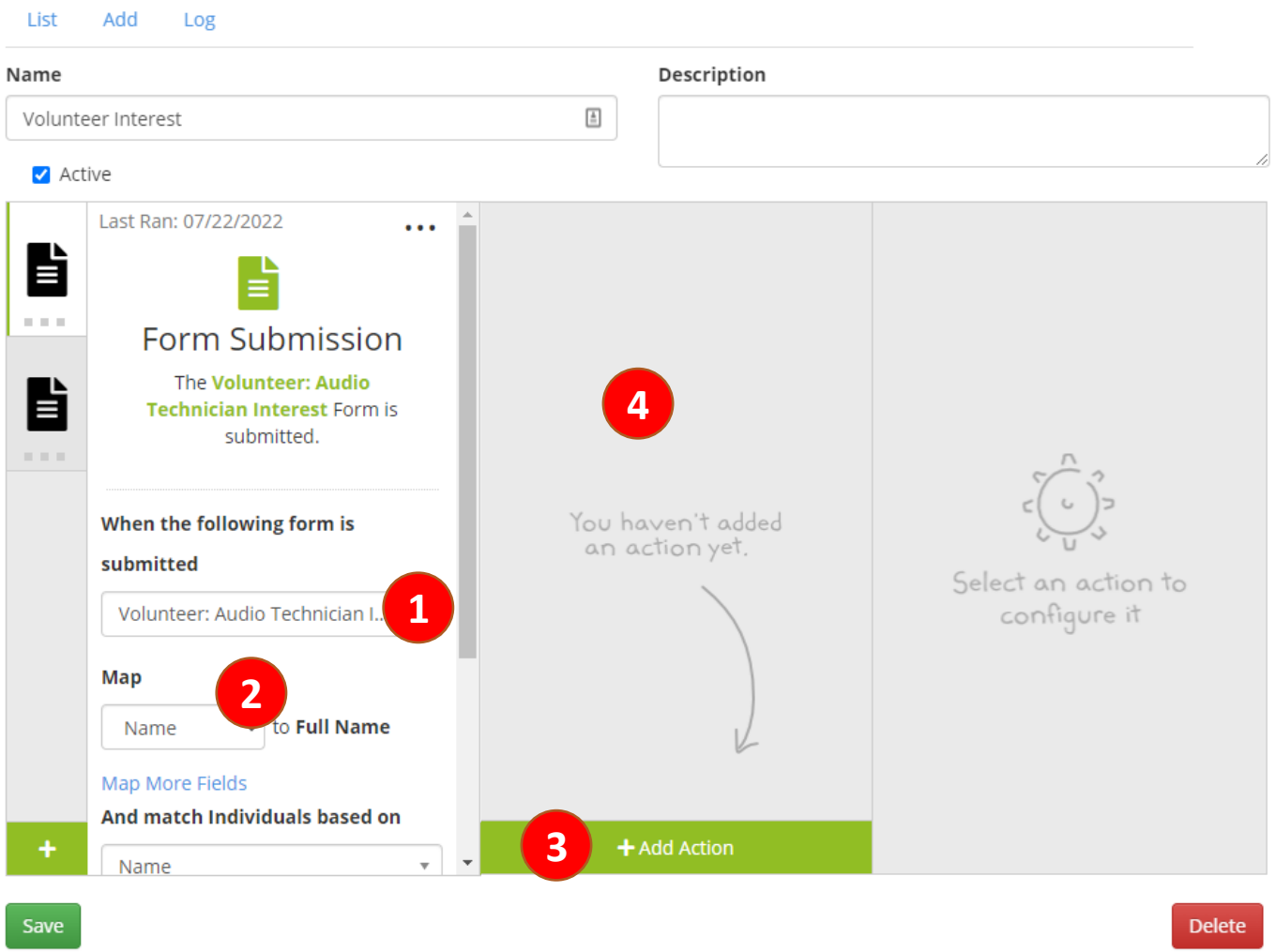
Build Workflows

1. Select Form
2. Map: Name
3. Add Action
4. Select Interaction



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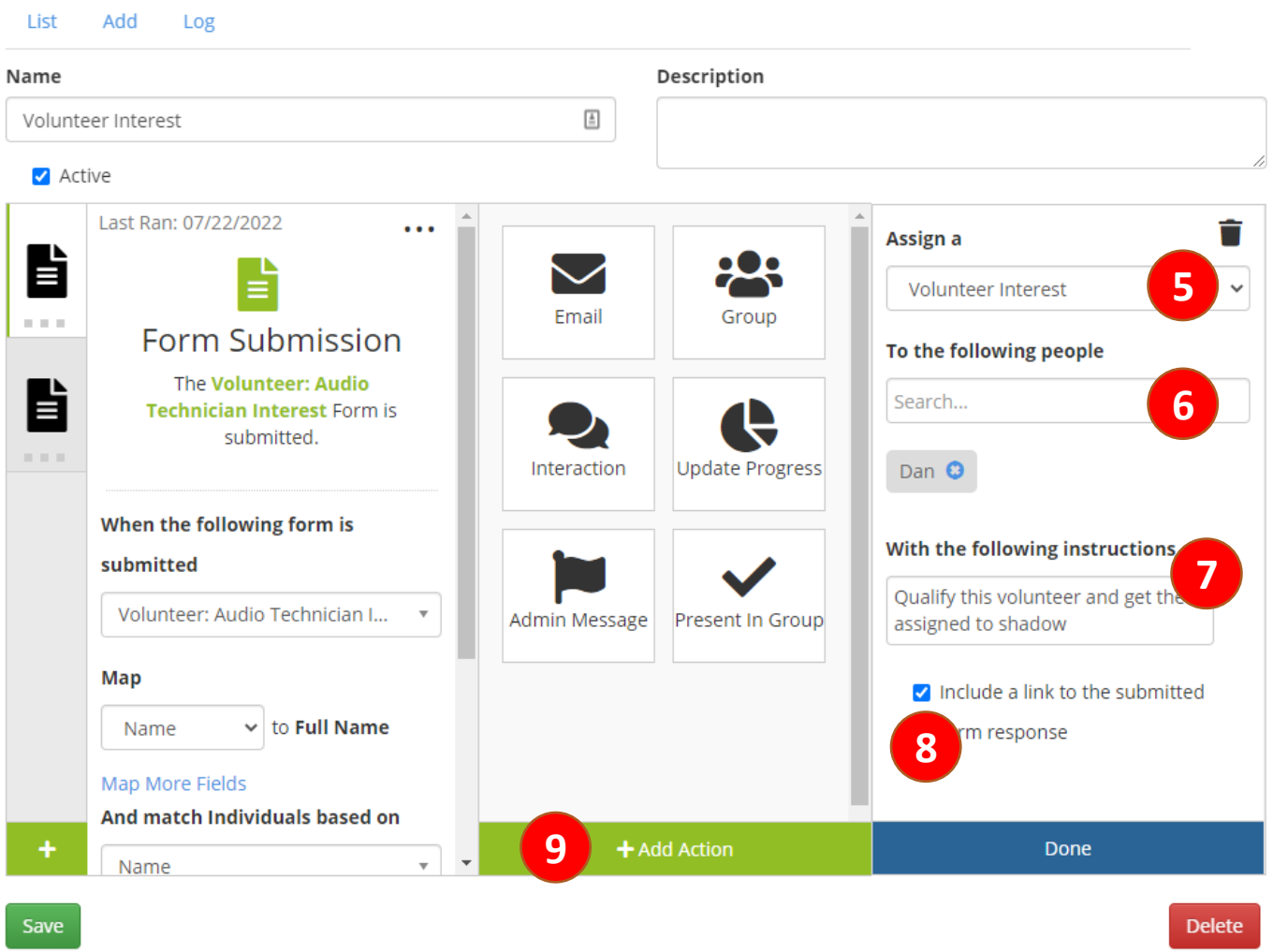
Build Workflows

5. Select Interaction type
6. Assign to people
7. Add instructions for the interaction
8. Check Include
9. Add Action



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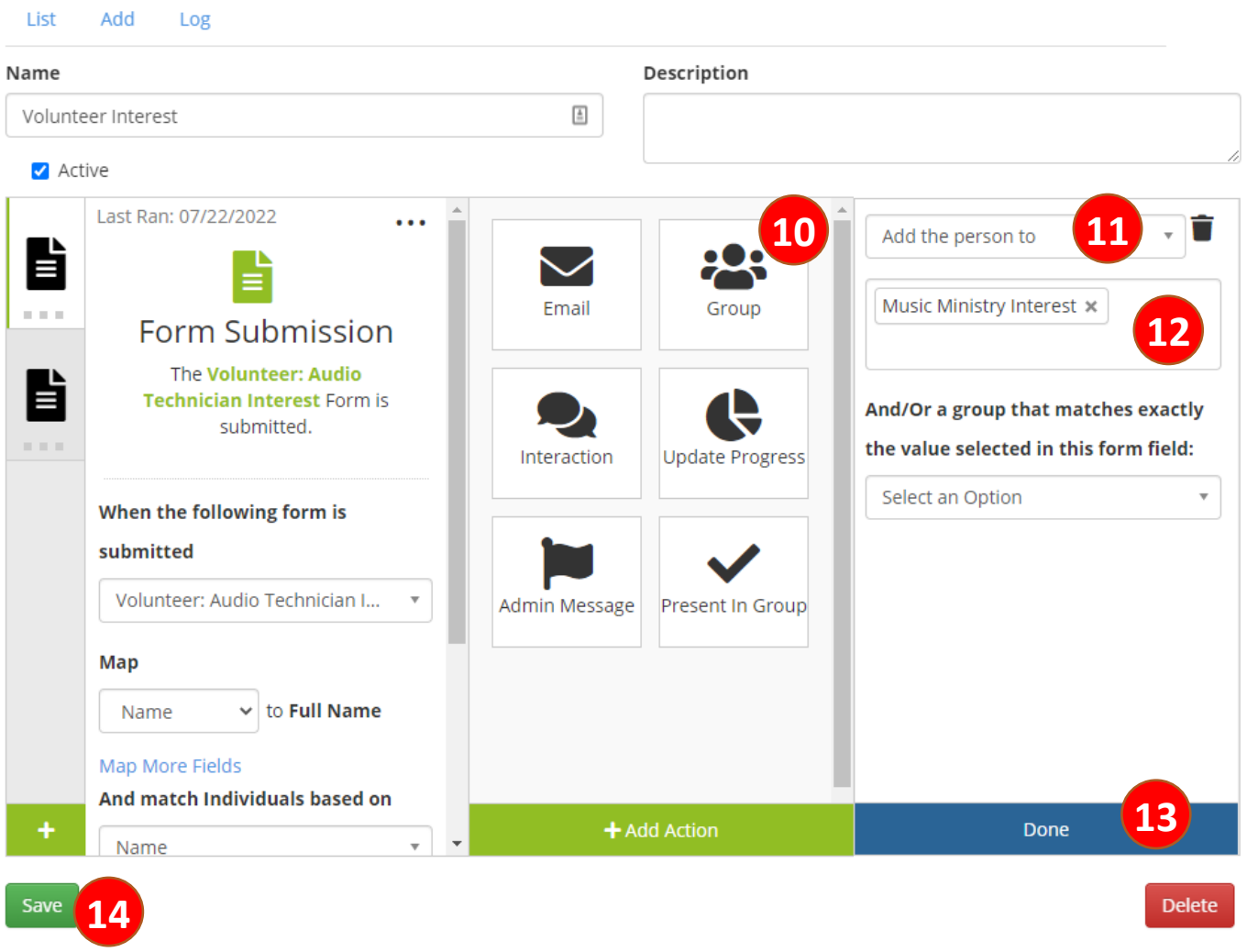
Build Workflows

10. Select Group
11. Select Add the person to
12. Select existing group
13. Done
14. Save



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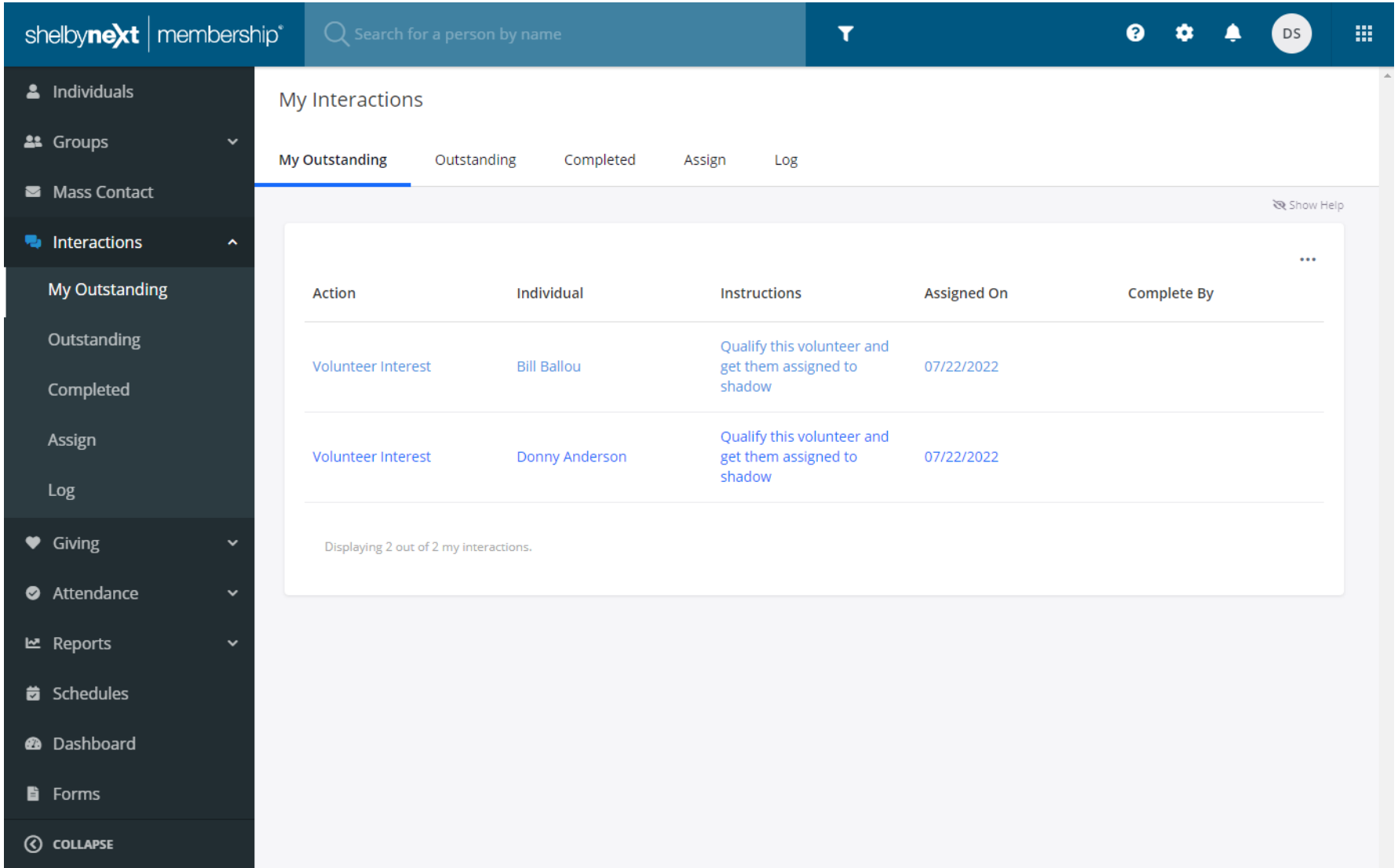
Interactions Viewed

- In ChMS



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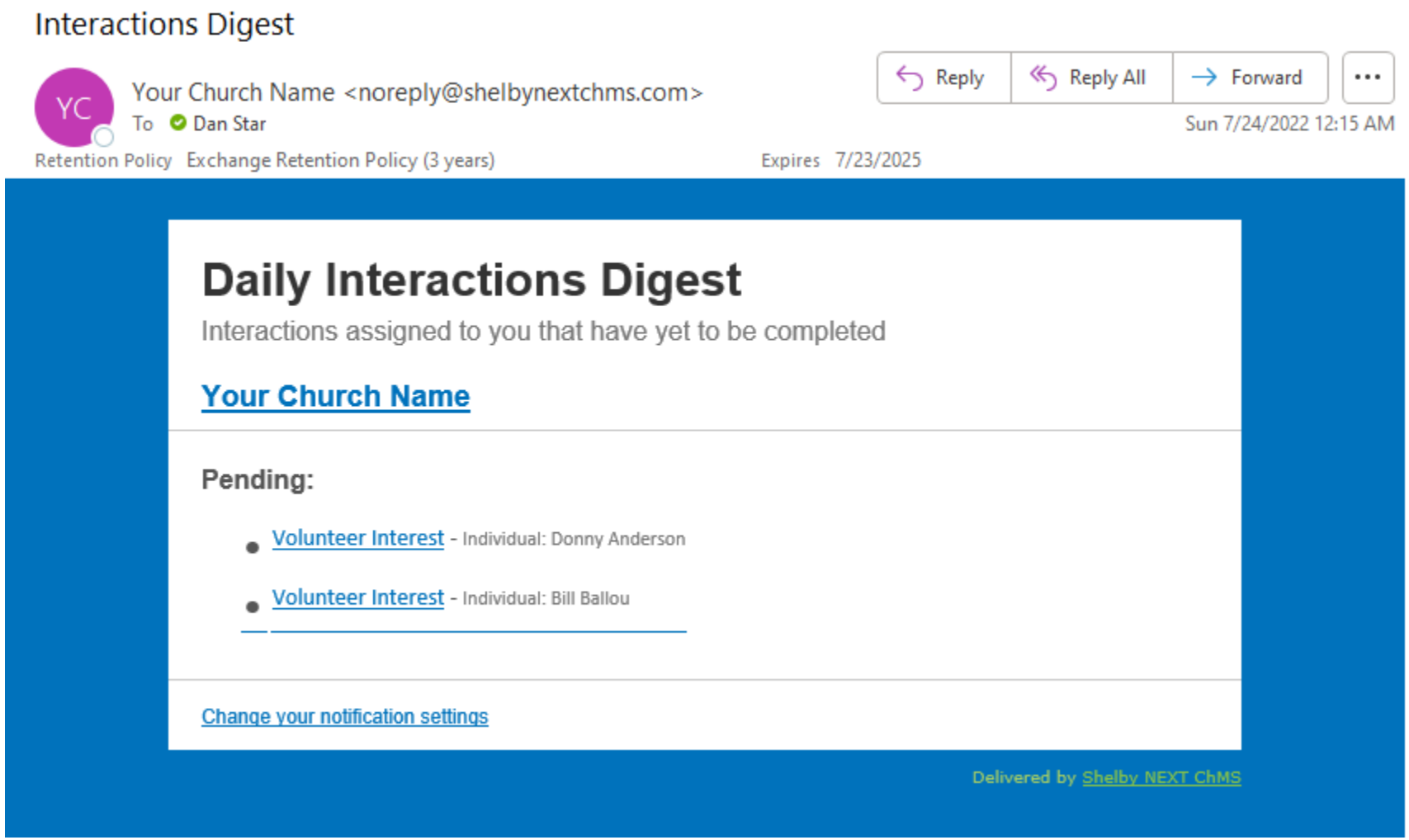
Interaction Viewed

- In ChMS
- In Email



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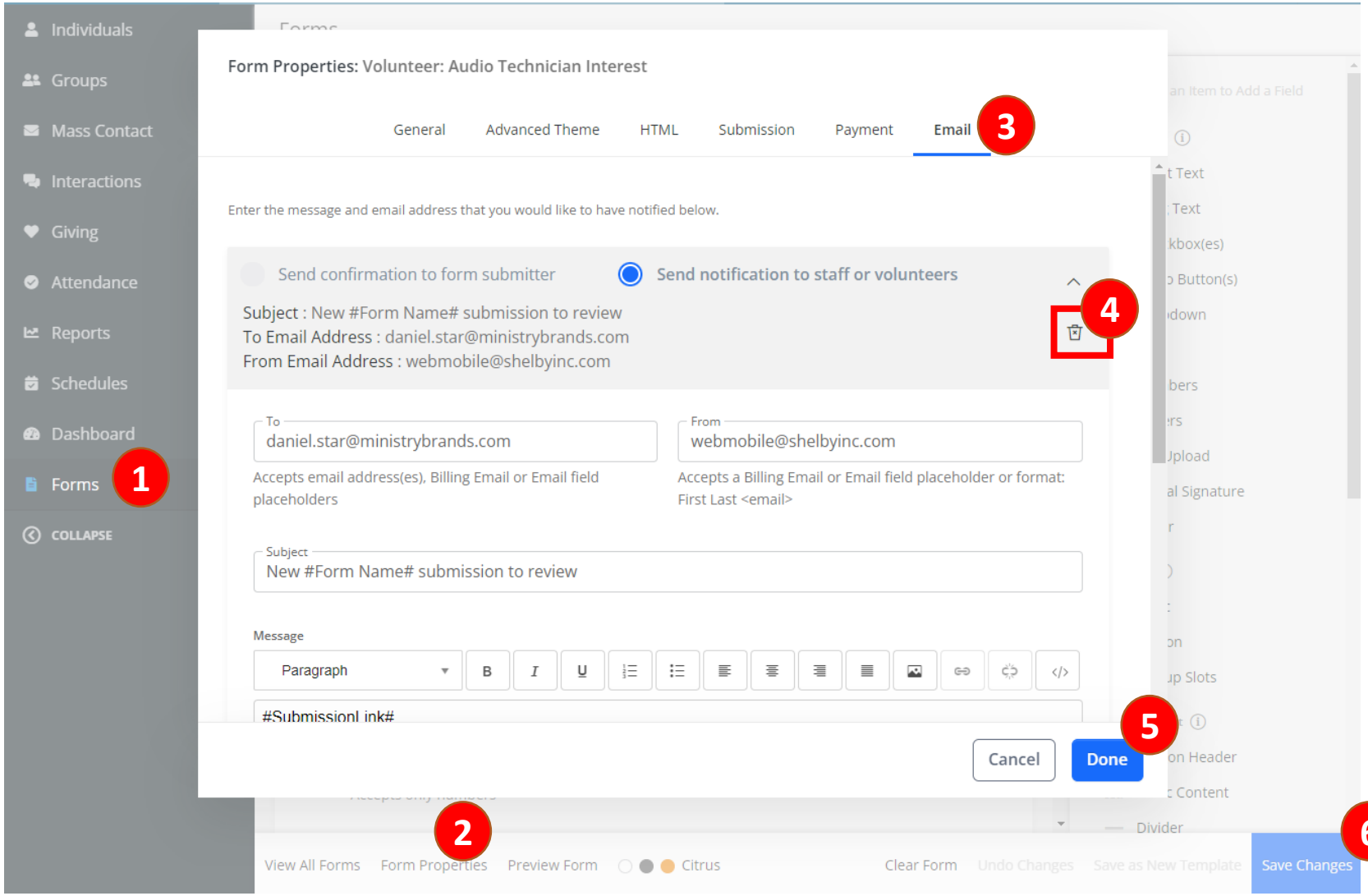
Remove Form Email

1. Forms
   Select form
2. Form Properties
3. Email
4. Delete icon
5. Done
6. Save
   and Publish



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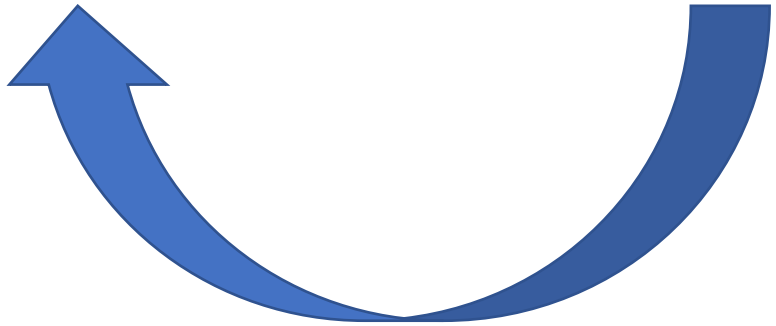
Review: Phase 2

Membership (ChMS)	Membership (ChMS)	Membership (ChMS)
Create Interaction Type	**Build Workflow** • Add Interaction • Add Group	Remove Form Email



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Phase 1

- Giving Forms
- Membership (ChMS)
- Website

Created Forms and embedded to Volunteer #2 Premium Layout

Sent a email

Created Interactions with Workflows

Records interest to the members' record and notifies staff member

Phase 2

- Membership (ChMS)

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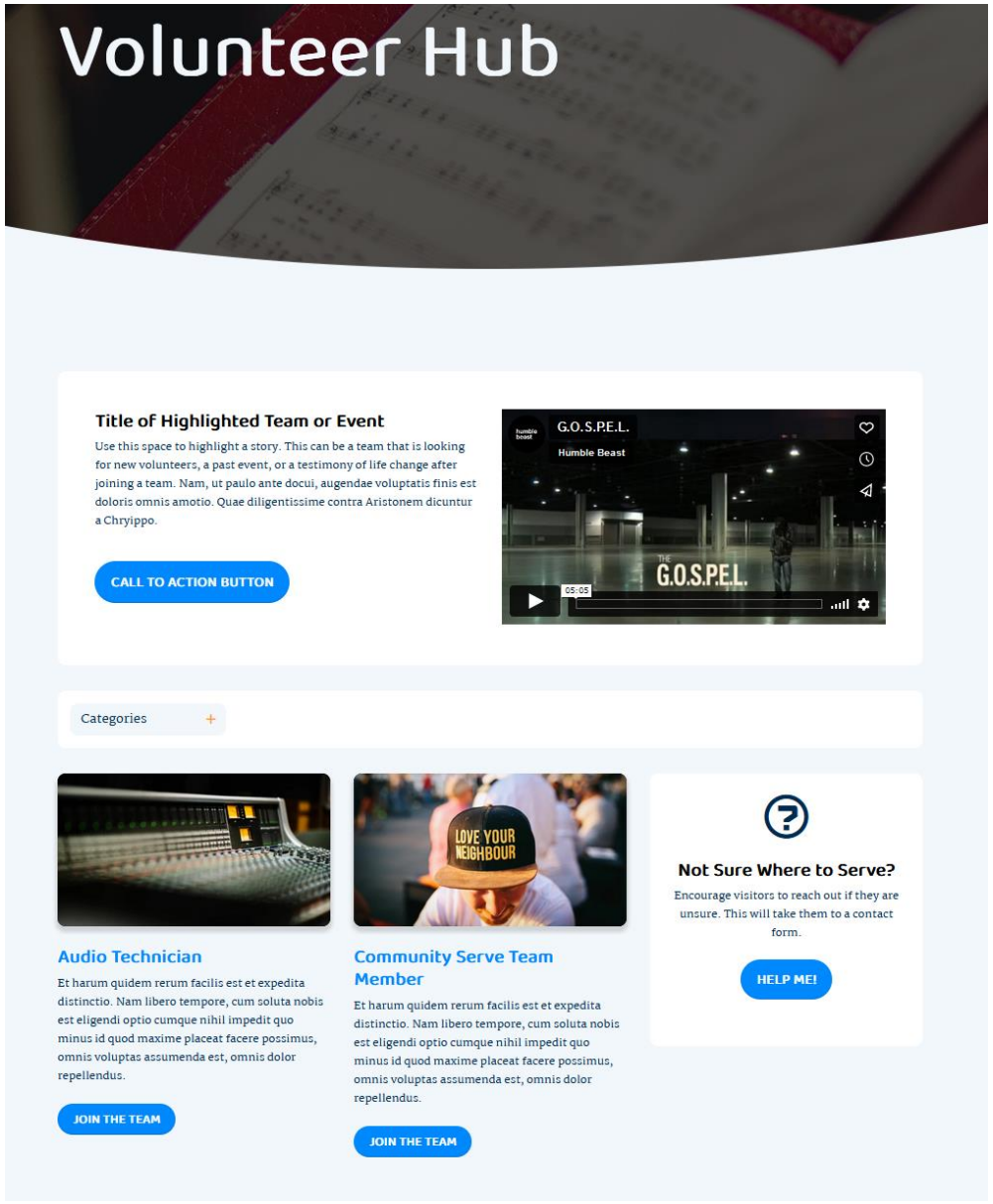

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https://store.shelbysystems.com/product/volunteer-2-premium-layout/

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@ Community.Shelbysystems.com

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Next "Advance Your Knowledge" Webinar

Good Tips for Using Interactions, Mass Contact, and Workflows

Date: 8/24/22

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

Led by: Ben Lane & Mark Crain

Shelby Staff Trainers

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Virtual Workshops

Virtual Workshops for 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!!!

Now Available!!!

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Need help??

Set up some training time:

training@shelbyinc.com
(with one of our consultants on ChMS or Financials $160 per hour)

webmobile@shelbyinc.com
(to set up training time with Dan Star specifically to discuss implementation strategy or design - $160 per hour)

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