

The background of the slide features a blurred image of a laptop on the left and a stack of several books on the right. The overall color scheme is a soft, light blue.

# **SHELBY**SYSTEMS®

## **Advance Your Knowledge Webinar Series**

**Purpose Driven Forms – Part 2  
(Giving, Special Events, and Holiday preparations)**

### **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



**Staci Sampson**

ShelbyNext Trainer



# Ways to Share Forms

QR Codes

*MinistryOne* Integration

Text - Keywords

Embed Code


Direct Link

# Special Offering

<https://training1.shelbnextchms.com/external/form/50d4a68d-d03a-4722-b924-b398e62a7671>



[Give Now](#) [Sign in](#)



## Local Shelter Christmas Offering

This Christmas we want to give back. Our Christmas offering will be going to support the local shelter! The hope is to raise \$5000.

---

Your Name

First Name  Last Name

Email

Local Shelter Christmas Offering  
\$0.00

**\$0.00** raised of \$5,000.00 goal

Christmas Offering

# Special Offering

## Fund Goals

- Fund Goals are NOT Pledge Campaigns!
- Fund Goals allows you set an online ONLY goal that can be displayed on a form.

**Add Fund** [x]

Fund Name  
Christmas Offering

Fund Code

**Fund Goal**  
5000

If fund goal is met, do the following

- Allow the fund to remain active and goal to be exceeded
- Deactivate the fund but allow recurring gifts to continue ⓘ
- Deactivate the fund and end all recurring gifts ⓘ

Give Now Sign in

## Local Shelter Christmas Offering

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Local Shelter Christmas Offering  
\$0.00

**\$0.00** raised of \$5,000.00 goal

Christmas Offering

**Fund Goal**

Give

# Special Offering: Keywords

**Form Keywords** +

Donors can text a keyword to a number or short code and receive a link to the form associated with that keyword.

Form Title	Keyword
CCOG Golf Tournament	GOLF
Children's B	
Men's Bible	

**Add a Keyword**

Form

Christmas Offering

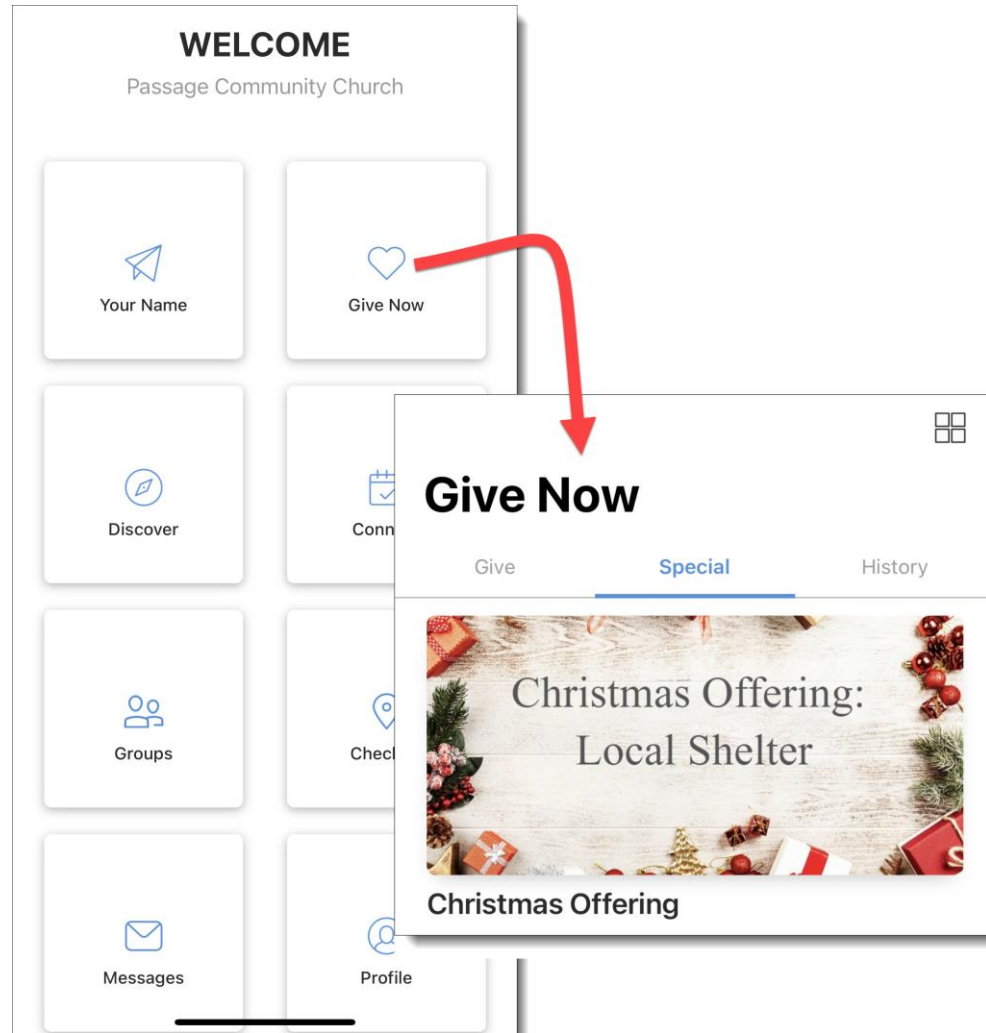
Form Keyword

SHELTER

**Save** Cancel

Text **SHELTER** to  
806-606-6773  
to receive the  
Christmas Offering  
form.

# Special Offering: Ministry One



- Forms: Select the **Special Donation** Category in *Form Properties>General*.
- MinistryOne app: In *Modules>Giving* toggle on the Special Donation tab.

# Christmas Concert A

<https://training1.shelbnextchms.com/external/form/36ae3224-52d4-46ce-ae0c-2bf2f8eb8da6>



## Christmas Concert (A)

Join us at First Church Dec. 11th for our annual Christmas concert. Doors open at 6:15 pm. Concert begins at 7:00 pm.

Family Name

Preferred email for tickets

## Tickets

Tickets for adults are \$35.00.

Tickets for children are \$25.00.

If you register by Dec. 1st you'll receive \$5 off on each ticket.

What type of tickets?

Adult

Child

Submit



# Christmas Concert A

## Payment Fields & Ticketing

- Tickets prices are set using **Payment Field of Calculated Amount.**
- In Form Properties>General tab the Category of Event Registration is select with Ticketing Enable.
- **MAKE SURE** to require a confirmation email on the form when you are using the ticketing feature!



### Christmas Concert (A)

Join us a First Church Dec.11th for our annual Christmas concert. Doors open at 6:15 pm. Concert begins at 7:00 pm.

Family Name

Preferred

#### Tickets

Tickets for adu

Tickets for child

If you register b

What type of tickets

Adult

#### What type of tickets?

Adult

Child

Adult Tickets

2

The price per Ticket is \$30.00.

8 Tickets per person.

298 Tickets remaining.

Children Tickets (optional)

3

The price per Ticket is \$20.00.

8 Tickets per person.

297 Tickets remaining.

#### I'd Like To Pay By

# Christmas Concert B

<https://training1.shelbnextchms.com/external/form/c414ad75-3936-4a4b-99fe-115d39517bb0>



## Christmas Concert (B)

Join us at First Church Dec. 11th for our annual Christmas concert. Doors open at 6:15 pm. Concert begins at 7:00 pm.

 Preferred email for tickets

Address (optional)

# Christmas Concert B

## Ticket Based Pricing and Contact Tracing

- Conditional Field to allow for combinations of adults and children
- Multiple required fields to account for COVID-19 contact tracing information collection
- Use of Name Field Sets allow for counting tickets sold and setting max attendance

**Tickets**

Who Will Be Attending? (optional)

Adults  Children  Both

[Clear Selection](#)

**Adult Attendee 1 \$35.00**

First Name  Last Name

Email

Phone Number

[Add Another Adult Attendee \(\\$35.00\)](#)

**Child Attendee 1 \$25.00**

First Name  Last Name

Is The Parent Attending?

# Volunteer Form

<https://training1.shelbnextchms.com/external/form/3afb364e-6bab-40a6-b31f-b93264553470>



## Christmas Concert Volunteer Registration

Please fill out this form to apply to serve as a volunteer for the Christmas Concert on December 11, 12, or 13.

Signups

1

Night 1, December 11  
25 Spots

Night 2, December 12  
25 Spots

Information

2

Night 3, December 13  
25 Spots

References and Backgrou...

3

First Name

Last Name

Email Address

# Volunteer Form

## Information Collection and Sign Ups

- Form separated into three distinct Steps (Sign-ups, Information, References and Background)
- Sign-Up Slots allow for a maximum number of sign-ups each night and for volunteer to select more than 1
- File upload and signature for copies of ID and informed consent for background check



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Night 3, December 13  
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References and Backgrou...

3

First Name

Last Name

Email Address

## Form Fields Used in Today's Presentation

- Fund Goals
- Form Property Categories
- Text – Keywords
- Payment Fields
- Ticketing options
- Sign Up Slots
- Steps
- File Uploads
- Signatures

# Where can I watch this video again?

**Watch or Register to attend  
Webinars**

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

**Now Including Slides to Download**

Advance Your Knowledge Webinar Series

Register for an Upcoming Webinar

Click on a Title to Watch NOW	Presented	
<a href="#">Purpose Driven Forms - Part 2 (Giving, Special Events, and Holiday preparations)</a>	10/27/2021 2:00 PM (Central Time)	<a href="#">Register NOW</a>
<a href="#">Things You Need To Know Before Year-End for eFiling Your W2s and 1099s</a>	10/20/2021	<a href="#">Slides</a>
<a href="#">Making, Tracking, and Reporting Budgets</a>	09/22/2021	<a href="#">Slides</a>
<a href="#">Purpose Driven Forms - Part 1 (Getting Ready for Fall)</a>	08/11/2021	<a href="#">Slides</a>
<a href="#">A Quick Look at Best Practices for Groups</a>	07/28/2021	<a href="#">Slides</a>

## Next “Advance Your Knowledge” Webinar

# Tracking Volunteers Using Worship Planning and ChMS Scheduling

**Date:** November 10, 2021

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

**Led by:** Carmen Dea & Mark Crain

[https://ministrybrands.zoom.us/webinar/register/WN\\_RuvsfA6fQoW3qiSWODM1dw](https://ministrybrands.zoom.us/webinar/register/WN_RuvsfA6fQoW3qiSWODM1dw)



# Virtual Workshops

- Financials 101 & ChMS 101 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](#)

Final Workshop Dates for 2021

November 15<sup>th</sup> through 18<sup>th</sup>

# 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)

[More with Forms](#)

[Purpose Driven Forms:](#)  
[Part 1](#)

[MinistryOne](#)