

We are **Recording!** We cannot see or hear you!

SHELBY SYSTEMS®

Advance Your Knowledge

Webinar Series

**Purpose Driven Forms:
Part 1**

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



Key Questions to Ask Yourself

- What is the Form for?
- Which items will you require a person to fill out?
- Do specific fields need to map or update into a specific fields of a person's ChMS record?
- Will this form be used with a workflow to connect with ChMS?

Key Things to Remember

- **P**lan: Start on Paper
- **E**xperts: Don't be the Only Expert
- **R**eview: Have Another Person Look Over the Form Before Publishing and Promoting
- **K**opy: Never Delete a Form You Liked, Use the Copy Button to Duplicate

Membership Update

<https://training1.shelbnextchms.com/external/form/db0ec684-4ae0-4acb-8342-1e8c1919fefa>



Update Your Connection with First Church

Now that First Church has moved to a software to help us better connect with you, we would like to know some of your preferences for connecting. Please fill out the questions below so we know the best way to communicate with you.

Name

FIRST NAME

LAST NAME

Your Preferences

YOUR PREFERRED METHOD CONTACT

WOULD YOU LIKE TO BE PART OF THE DIRECTORY? *optional*

 Yes No

HOW DO YOU PREFER TO HAVE YOUR GIVING STATEMENTS SENT? *optional*

DO YOU WISH TO UPDATE ANY OTHER FAMILY MEMBERS INFORMATION

 Yes No

New Items Used in Membership Update Form

- Person Field Set
- Radio Button(s)
- Dropdown
- Checkboxes

Update Your Connection with First Church

Now that First Church has moved to a software to help us better connect with you, we would like to know some of your preferences for connecting. Please fill out the questions below so we know the best way to communicate with you.

Name

FIRST NAME LAST NAME

Your Preferences

YOUR PREFERRED METHOD CONTACT

Select...

WOULD YOU LIKE TO BE PART OF THE DIRECTORY? *optional*

Yes No

HOW DO YOU PREFER TO HAVE YOUR GIVING STATEMENTS SENT? *optional*

Select...

DO YOU WISH TO UPDATE ANY OTHER FAMILY MEMBERS INFORMATION

Yes

No

SUBMIT

YOUR PREFERRED METHOD CONTACT

Text

CELLPHONE NUMBER

If you do not have a cellphone number please enter 000-000-0000.

WOULD YOU LIKE TO BE PART OF THE DIRECTORY? *optional*

Yes No

Clear Selection

IS THERE ANY OF THE BELOW INFORMATION WE CANNOT DISPLAY IN THE DIRECTORY? *optional*

Birthdate Address Email

HOW DO YOU PREFER TO HAVE YOUR GIVING STATEMENTS SENT? *optional*

Email Statement

DO YOU WISH TO UPDATE ANY OTHER FAMILY MEMBERS INFORMATION

Yes No

Family Member 1

FIRST NAME LAST NAME

RELATIONSHIP TO YOU *optional*

Spouse Child

FAMILY MEMBER'S CELL PHONE NUMBER *optional*

FAMILY MEMBER'S EMAIL *optional*

FAMILY MEMBER'S BIRTHDAY *optional*

Add Another Family Member

Sunday School Registration



Fall Sunday School
Sign Up

Join us for our Fall time session of Sunday School classes. Classes start on Sunday, Sept. 5th at 9 am!

Family Member 1

FIRST NAME LAST NAME

EMAIL FOR CONFIRMATION OF SUNDAY SCHOOL REGISTRATION

ARE YOU LOOKING FOR ADULT, YOUTH, OR CHILDREN CLASSES?

Adult Youth Children

<https://training1.shelbnextchms.com/external/form/51fc4588-a2ac-4c96-901f-efb2de4316ef>



New Items Used in Sunday School Registration

The screenshot shows a registration form for 'Fall Sunday School Sign Up'. The form includes a header image with the title, a brief description, and a section for 'Family Member 1'. This section contains input fields for 'FIRST NAME' and 'LAST NAME', an 'EMAIL FOR CONFIRMATION OF SUNDAY SCHOOL REGISTRATION' field, and radio buttons for 'Adult', 'Youth', and 'Children'. A 'Clear Selection' link is visible below the radio buttons. A modal window is open, showing a 'CLASS TYPE' dropdown menu with options for 'Men's', 'Women's', and 'Mixed'. The 'Men's' option is selected. Below the dropdown, there is a list of 'MEN'S SUNDAY SCHOOL CLASSES' with one item: 'SS - Power in the Word - 14 remaining'. The modal also includes a 'Lead by John Smythe' section with a description and an 'Add Another Family Member' button.


- Dropdown with ChMS Groups
- Conditions
- Static Text

Pledge Campaign

<https://training1.shelbynextchms.com/external/form/fa0f59e0-7974-48db-9ed3-6256a71ca745>



[GIVE NOW](#) [SIGN IN](#)



**2022
First Church
Pledge
Campaign**

Pledge Information 1

Pledge(s) 2

NAME OF PLEDGER(S)

Pledge(s) Address

ADDRESS LINE 1 **ADDRESS LINE 2**

CITY **STATE** **ZIP CODE**

PRIMARY EMAIL FOR CONFIRMATION AND STATEMENT

INCLUDE ADDITIONAL PERSON TO RECEIVE EMAILED STATEMENT?
 Yes No

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New Items Used in Pledge Campaign Form

- Text Field Instead of Name Field
- Address
- Steps
- Giving

GIVE NOW SIGN IN

2022
First Church
Pledge
Campaign

Pledge Information 1

NAME OF PLEDGER(S)
First and Last Name(s) Please

Pledge(s) 2

Pledge(s) Address

ADDRESS LINE 1 ADDRESS LINE 2

CITY STATE ZIP CODE

PRIMARY EMAIL FOR CONFIRMATION AND STATEMENT

INCLUDE ADDITIONAL PERSON TO RECEIVE EMAILED STATEMENT?
 Yes No

Next >

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Visitor Connect Form

<https://training1.shelbnextchms.com/external/form/2f3fab36-1c61-4a38-8c07-e8004f12030e>

A screenshot of a web form titled "First Church Visitor". The form has a light blue background and a decorative border with a floral pattern at the top. It includes fields for Name (First and Last), Email (optional), Home Phone Number (optional), Areas of Interest (checkboxes for Children's Ministry, Youth Ministry, Small Groups, Women's Ministry, Men's Ministry, and Other), Other Family? (radio buttons for Yes and No), Spouse's Cell Phone Number (optional) with a country code dropdown, and Spouse's Email (optional). A blue "SUBMIT" button is at the bottom right.

First Church Visitor

Welcome to First Church. We would love to get to know a little more about you.

Name

FIRST NAME LAST NAME

EMAIL optional

HOME PHONE NUMBER optional

AREAS OF INTEREST optional

Children's Ministry Youth Ministry Small Groups Women's Ministry Men's Ministry

Other

OTHER FAMILY? optional

Yes No

SPOUSE'S CELL PHONE NUMBER optional

(201) 555-0123

SPOUSE'S EMAIL optional

SUBMIT

New Items Used in Visitor Connect Form

The form is titled "Name" and contains the following fields and options:

- Name:** FIRST NAME and LAST NAME (text input fields).
- EMAIL:** optional (text input field with an envelope icon).
- HOME PHONE NUMBER:** optional (text input field with a phone icon and a dropdown for country code, showing "(201) 555-0123"). Below the field is the text "Accepts only numbers".
- CELL PHONE NUMBER:** optional (text input field with a phone icon and a dropdown for country code, showing "(201) 555-0123").
- PREFERRED METHOD OF CONTACT:** optional (radio buttons for Email, Phone, and Text).
- Address:** ADDRESS LINE 1 and ADDRESS LINE 2 (text input fields).
- CITY:** (text input field).
- STATE:** (text input field).
- ZIP CODE:** (text input field).
- AREAS OF INTEREST:** optional (checkboxes for Children's Ministry, Youth Ministry, Small Groups, Women's Ministry, Men's Ministry, and Other).
- OTHER FAMILY?:** optional (radio buttons for Yes and No).
- SPOUSE'S CELL PHONE NUMBER:** optional (text input field with a phone icon and a dropdown for country code, showing "(201) 555-0123").
- SPOUSE'S EMAIL:** optional (text input field with an envelope icon).

A blue "SUBMIT" button is located at the bottom right of the form.

- Header Image
- Person Name Field
- Phone Number
- Email
- Checkboxes Into Workflows

Form Fields Used in Today's Presentation

- Person Field Set
- Radio Button(s)
- Dropdown
- Checkboxes
- Dropdown with ChMS Groups
- Conditions
- Static Text
- Text Field
- Address
- Steps
- Giving
- Person Name Field
- Phone Number
- Email
- Checkboxes Into Workflows

Purpose Driven Forms - Part 2 (Giving, Events, and More)

Date: October 27, 2021

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

Led by: Mark Crain and Staci Sampson

Where can I watch this video again?

**Watch or Register to attend
Webinars**

@ 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)	Register NOW

Watch a Previous Webinar

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

Next “Advance Your Knowledge” Webinar

Making, Tracking, and Reporting Budgets

Date: September 22, 2021

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

Led by: Carmen Dea and Ben Lane

New 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

[More with Forms](#)

[Workflow Webinar](#)

[MinistryOne](#)