



Ministry Brands®

Advance Your Knowledge Webinar Series

Tips for Using Interactions, Mass Contact, and Workflows

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.

Topics

- Interactions – Task communication tool
- Mass Contact – Email, text, and voice communications
- Workflows – Automated record selection and communication tool



Interactions

- Major Benefits of Interactions
 - Delivered via email and can be responded in the email sent to the Assigned person without having to log in to ChMS
 - Thorough reporting
 - Can be initiated from a workflow
 - Place to store mass email on a person's record
 - Viewable and started from the Navigation or the Timeline Tab of a record
 - Interaction Types can be added
 - Can be initiated and responded to in the ChMS app



<https://documentation.learnchms.com/external/article/1360?l=37>

Assign and Log

- Assign – Notify a person of a task to accomplish and provides the accountability to know it was completed
 - Hospital Visitation
 - Welcome Card assignments
 - Staff contacts
- Log – Provides a location to enter comments on a person's record
 - Enter notes from planned contacts
 - Enter notes from spontaneous contacts
- Securable
 - Pastoral Comments

Interactions - Assign

Action *
Email

Assign To *

Choose a name from the suggestion list.

Individual *

Choose a name from the suggestion list.

Instructions *

To Be Completed By

Notify Me On Completion



Interactions - Log

Action *
Email

Completed By *
Ben Lane
Choose a name from the suggestion list.

Individual *
Search...
Choose a name from the suggestion list.

Instructions

Summary *

Date Completed *
08/24/2022

Save



Interactions - Securable

	View	Assign	Log	Edit	Delete
ALL TYPES Select all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Select all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Select all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hospital Visit Select all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pastoral Comment (Secured) Select all	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SMS Select all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Interactions - Timeline


Timeline

Q Search


All Time Group Reset






Today

Aug. 14, 2020
Friday

 **Guest Registration Card Follow up**
Requested information from Guest Registration Card
Assigned to [Student Ministry](#)
Completed: Called Joey and gave him the requested information.

Sep. 18, 2019
Wednesday

 **Email**
Assigned [Billy Adams](#) Follow up to join youth



Interactions - Navigation

My Interactions

My Outstanding

Outstanding

Completed

Assign

Log

My Outstanding – All Interactions assign to this record that have not been completed

Outstanding – Outstanding Interactions for all records.

Completed – Completed Interactions for All Records

Assign – Assign an Interaction to a record

Log – Log an Interaction

Interactions - Reporting

Text Includes

Action

Completed Start Date

Completed End Date

Group Group Views

 Show Archived

Person Assigned

Filter

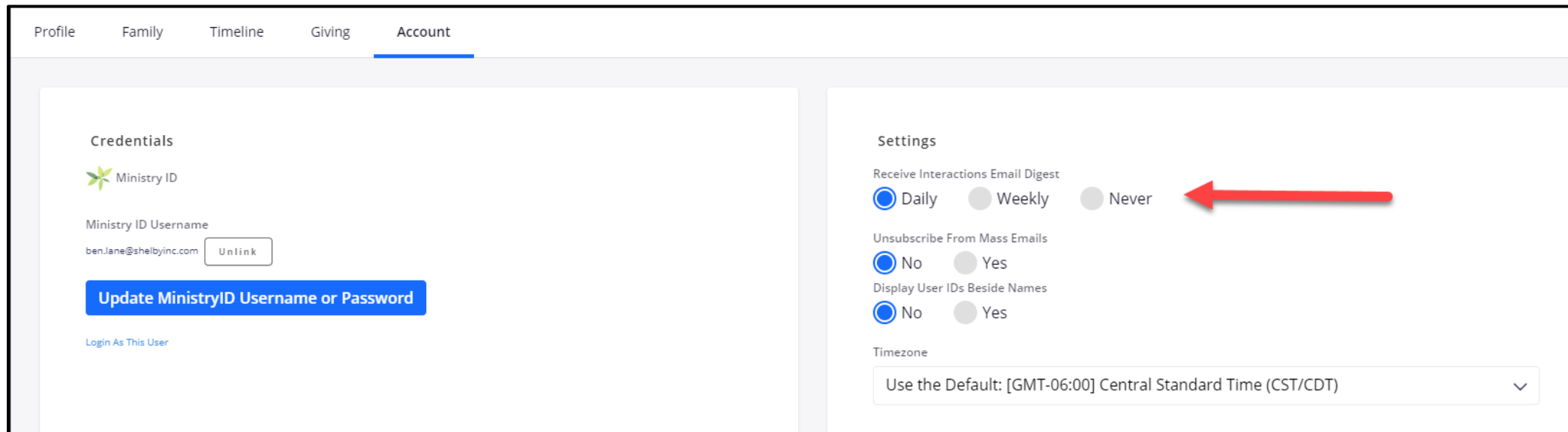
Print

Export

Reset Submit

Interactions – Reminder selection

Reminders of outstanding Interactions will be delivered via email Daily, Weekly, or Never as the user chooses.



The screenshot displays the 'Account' settings page in the Ministry Brands system. The page is divided into two main sections: 'Credentials' on the left and 'Settings' on the right. The 'Settings' section includes options for email digests, mass emails, user IDs, and timezones. A red arrow points to the 'Never' radio button under the 'Receive Interactions Email Digest' setting, indicating the selected option.

Profile Family Timeline Giving **Account**

Credentials

Ministry ID

Ministry ID Username
ben.jane@shelbyinc.com [Unlink](#)

[Update MinistryID Username or Password](#)

[Login As This User](#)

Settings

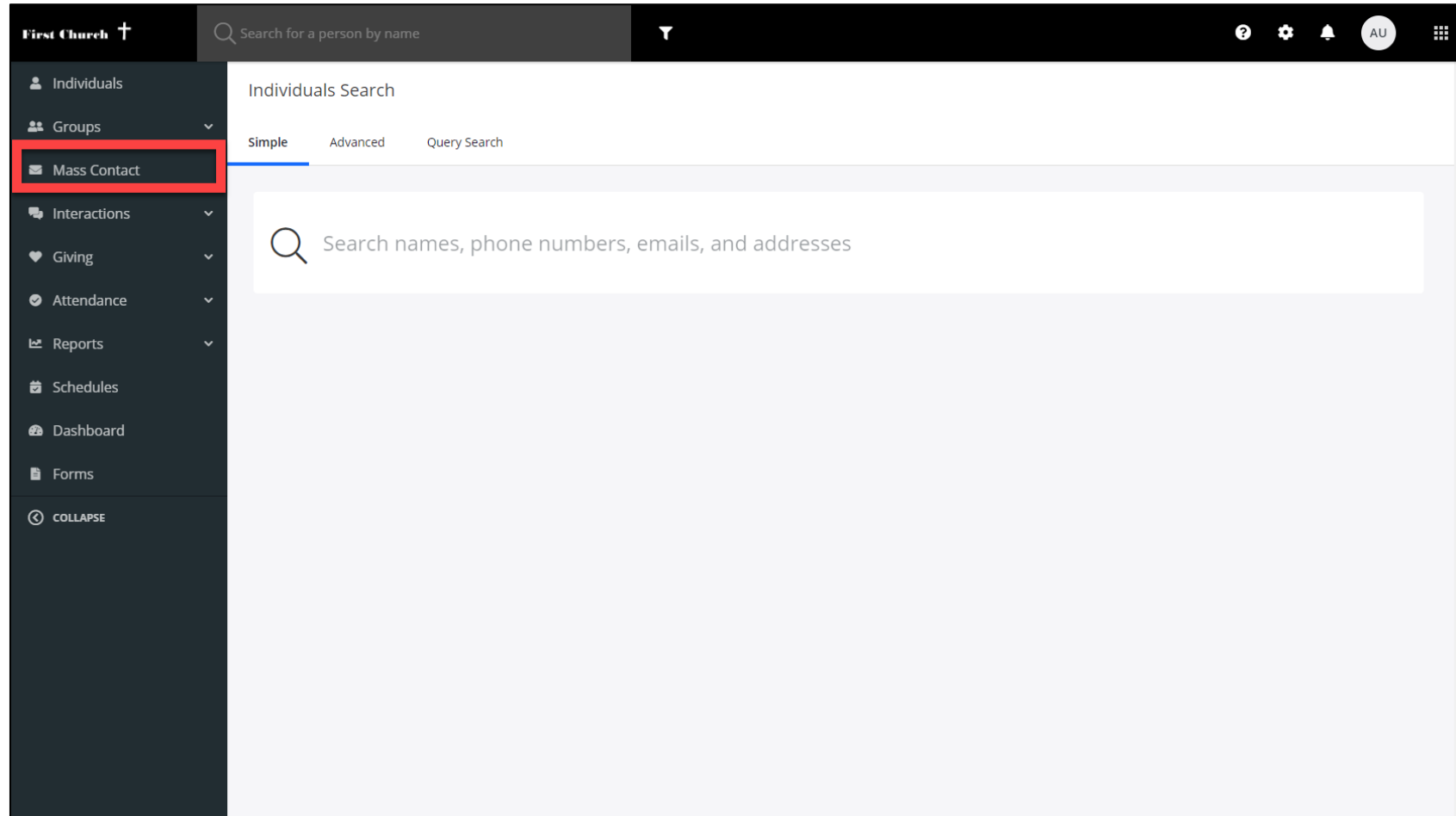
Receive Interactions Email Digest
 Daily Weekly Never

Unsubscribe From Mass Emails
 No Yes

Display User IDs Beside Names
 No Yes

Timezone
Use the Default: [GMT-06:00] Central Standard Time (CST/CDT) [v](#)



Mass Contact









Statistics

Mass Contact

[New Message](#)

Start Date  End Date 

Sent	Scheduled	Message Title	Type	Sender	Recipients	Delivered	Bounces	Opened	
		Discipleship Frameworks	Email	Joe Admin	1	-	-	-	>
		1st Time Visitor Text	Text (SMS)	Administrator	25	-	-	-	>
		Mid-Week Scripture	Text (SMS)	Administrator	14	-	-	-	>
		Churchwide BBQ Email!	Email	Administrator	2460	320	1199	15	>
		Sunday Student Newsletter!	Email	Administrator	14	6	21	1	>
		Welcome to Church!	Email	Administrator	18	17	-	10	>



Statistics (cont.)

Sent ✓ Mar 02, 2021 Sent by Administrator From Name Pastor Joe From Address notag@kummins.com

Recipients

[CAMPUS - Marbleton Campus], [CAMPUS - York Campus], [CAMPUS - Branch Creek Campus], [CAMPUS - Spinola Campus] ... including Rita Hummel, Steven Berry, Cassie Berry, Clarissa Miller

Show all 753 recipients >

Missing Email Addresses

Tim Smith, Jacquelyn Adair, Reid Bell, Margaret Bell, Kelly Banks, Roger Baker Jr., Ryan Carlson, Richard Milburn, Shane Williams, Sara Brown, Roger Brown, Tom Burt, Todd Bailey, Austin Bone, Sonia Barnes...

Show all >

Successful deliveries	Opened	Soft bounces	Pending	Hard bounces ⓘ
168	15	62	1755	630

Email Preview

From: Administrator

Subject: Churchwide BBQ is this Weekend!

We can't wait to see you all this weekend!



Deliveries

✓ **Sent:** Mar 02, 2021
 Sent by: Administrator
 From Name: Pastor Joe
 From Address: noreply@learnchms.com

Recipients
[\[CAMPUS - Manheim Campus\]](#), [\[CAMPUS - York Campus\]](#), [\[CAMPUS - Branch Creek Campus\]](#), [\[CAMPUS - Ephrata Campus\]](#), ... excluding Rita Homestead, Steven Green, Gonzalo Gomez, Clarissa Abbey
[Show all 753 recipients >](#)

Missing Email Addresses
[Tim Smith](#), [Jacquilyn Adair](#), [Reid Bell](#), [Morgan Bell](#), [Kelly Banks](#), [Roger Baker Jr.](#), [Ryan Carlson](#), [Richard Milborn](#), [Shane Milborn](#), [Dave Brown](#), [Regan Boost](#), [Tom Bunt](#), [Todd Bailey](#), [Averie Bow](#), [Susie Barnes...](#)
[Show all >](#)

Successful deliveries	Opened	Soft bounces	Pending	Hard bounces ⓘ
168	15	62	1755	630

Email Preview

From: Administrator
Subject: Churchwide BBQ is this Weekend!

We can't wait to see you all this weekend!



Opened Messages

BBQ Email!

Sent ✓ Mar 02, 2021	Sent by Administrator	From Name Pastor Joe	From Address noreply@learnchms.com
-------------------------------	---------------------------------	--------------------------------	--

Recipients
[\[CAMPUS - Manheim Campus\]](#), [\[CAMPUS - York Campus\]](#), [\[CAMPUS - Branch Creek Campus\]](#), [\[CAMPUS - Ephrata Campus\]](#), ... excluding Rita Homestead, Steven Green, Gonzalo Gomez, Clarissa Abbey
[Show all 753 recipients >](#)

Missing Email Addresses
[Tim Smith](#), [Jacquilyn Adair](#), [Reid Bell](#), [Morgan Bell](#), [Kelly Banks](#), [Roger Baker Jr.](#), [Ryan Carlson](#), [Richard Milborn](#), [Shane Milborn](#), [Dave Brown](#), [Regan Boost](#), [Tom Bunt](#), [Todd Bailey](#), [Averie Bow](#), [Susie Barnes...](#)
[Show all >](#)

Successful deliveries 168	Opened 15	Soft bounces 62	Pending 1740	Hard bounces ⓘ 645
-------------------------------------	---------------------	---------------------------	------------------------	------------------------------

Email Preview



Soft Bounce aka Deferral

Sent ✓ Mar 02, 2021	Sent by Administrator	From Name Pastor Joe	From Address noreply@learnchms.com		
Recipients [CAMPUS - Manheim Campus], [CAMPUS - York Campus], [CAMPUS - Branch Creek Campus], [CAMPUS - Ephrata Campus], ... excluding Rita Homestead, Steven Green, Gonzalo Gomez, Clarissa Abbey Show all 753 recipients >					
Missing Email Addresses Tim Smith, Jacquilyn Adair, Reid Bell, Morgan Bell, Kelly Banks, Roger Baker Jr., Ryan Carlson, Richard Milborn, Shane Milborn, Dave Brown, Regan Boost, Tom Bunt, Todd Bailey, Averie Bow, Susie Barnes... Show all >					
Successful deliveries 168	Opened 15	Soft bounces 62	Pending 1740	Hard bounces ⓘ 645	
Email Preview					
From: Administrator					
Subject: Churchwide BBQ is this Weekend!					



Why do Soft Bounces Occur?

Soft Bounces and Deferrals most often occur when:

- The recipient's mailbox is full.
- The recipient's mail server has a rate-limit on emails being received and has been exceeded..
- The email or file that is attached is too large.
- The receiving server might be too busy to accept the email.

Actions:

- Allow the system time to attempt to resend the emails. If a particular email continues to soft bounce you have the option to either stop sending email to that contact or you can coordinate with that recipient and verify their email information.
- If issues persist after working through the troubleshooting methods, please contact Support by clicking on the "?" icon in your database, we would be happy to help!



Pending

Sent ✓ Mar 02, 2021	Sent by Administrator	From Name Pastor Joe	From Address noreply@learnchms.com		
Recipients [CAMPUS - Manheim Campus], [CAMPUS - York Campus], [CAMPUS - Branch Creek Campus], [CAMPUS - Ephrata Campus], ... excluding Rita Homestead, Steven Green, Gonzalo Gomez, Clarissa Abbey Show all 753 recipients >					
Missing Email Addresses Tim Smith, Jacquilyn Adair, Reid Bell, Morgan Bell, Kelly Banks, Roger Baker Jr., Ryan Carlson, Richard Milborn, Shane Milborn, Dave Brown, Regan Boost, Tom Bunt, Todd Bailey, Averie Bow, Susie Barnes... Show all >					
Successful deliveries 168	Opened 15	Soft bounces 62	Pending 1740	Hard bounces ⓘ 645	
Email Preview					
From: Administrator					
Subject: Churchwide BBQ is this Weekend!					



Hard Bounces

Sent ✓ Mar 02, 2021	Sent by Administrator	From Name Pastor Joe	From Address noreply@learnchms.com		
-------------------------------	---------------------------------	--------------------------------	--	--	--

Recipients
[\[CAMPUS - Manheim Campus\]](#), [\[CAMPUS - York Campus\]](#), [\[CAMPUS - Branch Creek Campus\]](#), [\[CAMPUS - Ephrata Campus\]](#), ... excluding Rita Homestead, Steven Green, Gonzalo Gomez, Clarissa Abbey
[Show all 753 recipients >](#)

Missing Email Addresses
 Tim Smith, Jacquilyn Adair, Reid Bell, Morgan Bell, Kelly Banks, Roger Baker Jr., Ryan Carlson, Richard Milborn, Shane Milborn, Dave Brown, Regan Boost, Tom Bunt, Todd Bailey, Averie Bow, Susie Barnes...
[Show all >](#)

Successful deliveries 168	Opened 15	Soft bounces 62	Pending 1735	Hard bounces ⓘ 650
-------------------------------------	---------------------	---------------------------	------------------------	------------------------------

Email Preview

From: Administrator

Subject: Churchwide BBQ is this Weekend!

We can't wait to see you all this weekend!



Why do Hard Bounces Occur?

Hard Bounces most often occur when:

- The recipient's email address does not exist.
- The recipient's domain name does not exist.
- The recipient's email server has blocked your emails.
- Your emails have been unsubscribed from, marked as spam or blocked.

Actions:

- It is recommended that you determine which addresses are hard bouncing frequently and coordinate with the recipient to update their data with accurate information. If the recipient is no longer involved, you may simply remove them from the distribution list.
- If issues persist after working through the troubleshooting methods, please contact Support by clicking on the "?" icon in your database, we would be happy to help!



Removing a Block/Unsubscribe

Cody Salmon

Profile Edit Family Timeline Giving

Account

Credentials

Username

Cody.Salmon

Password

To change the password, enter the new password in bot...

Confirm Password

The password must be at least 6 characters long.

[Login As This User](#)

Settings

Receive Interactions Email Digest

Daily Weekly Never

Unsubscribe From Mass Emails

No Yes

Blocked from Mass Emails

The Individual's email has previously bounced. [Clear Block](#)

Display User IDs Beside Names

No Yes

Timezone

Use the Default ([GMT-05:00] Americ... ▾

The default timezone is: [GMT-05:00] America/New York.

CLEAR BLOCK

×

By typing CLEAR BLOCK, I confirm that this person has explicitly given me permission to clear the email block for them. I understand I will only be able to unblock this Individual's email once.

Type CLEAR BLOCK below

RESUBSCRIBE USER

×

By typing RESUBSCRIBE, I confirm that this person has explicitly given me permission to resubscribe them. I understand I will only be able to resubscribe this person once.

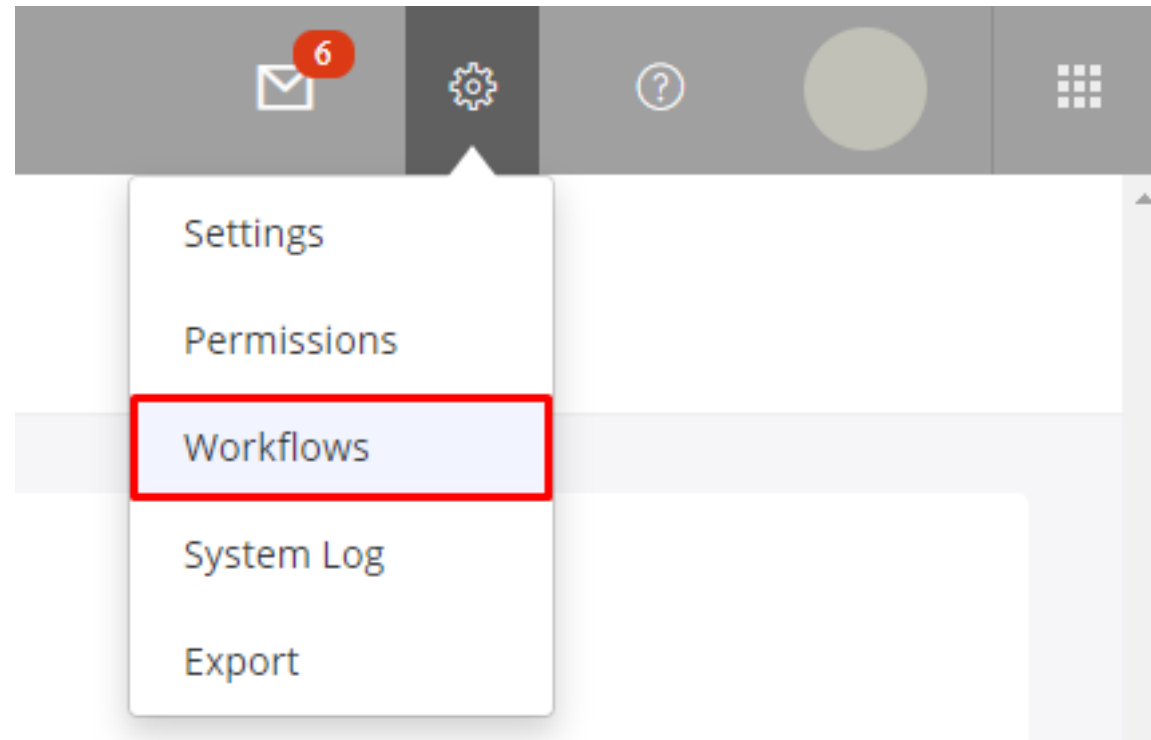
TYPE RESUBSCRIBE BELOW

Close

Save



Workflows



Workflows for Giving and Activity

<https://getstarted.church/database/5-powerful-giving-workflows>

[Using Workflows to Track Activity and Involvement](#)



Workflow -Dates

Can be used for system dates; Birthdate, Died Date, Baptized Date, Last Activity, Last Contributed and Last Attended as well as the Configurable dates set up in your system.

Treat as an Anniversary—Used to ignore the years so that you can get those whose birthday is in this month

Match a Individual who is in

Member x

Choose Event

Birthday

Treat this event as an anniversary

Yes

When the event is (use 0 for "today")

30

Days

In the future



Workflow - Dates

- Birthday Reminders
- Background check expiration reminders
- Wedding Anniversary notifications
- Medical release Expiration notification
- List of those who have passed away in the last year

Workflow – Managing Guests



Scenario: Managing Guests

The church wants to track the first, second, and third visits made. There would be different tasks for each time they visit. After the third visit they invite them to the Prospective new member class.

Process: Set up a group to track attendance for guests, the visits, and prospective member class. Set up a workflow to identify when a guest visits the first, second, and third times and add them to the next group. Set up an action to remove them from the previous visit group. Set up a workflow to identify when a guests has not visited when a preset time has passed.



Groups

<input type="text" value="Search Groups..."/>				
<input type="checkbox"/>	▲ Name	Leader(s)	Count	Edit
<input type="checkbox"/>	1st Time Visit		0	Edit 
<input type="checkbox"/>	2nd Time Visit		0	Edit
<input type="checkbox"/>	3rd Time Visit		0	Edit
<input type="checkbox"/>	Prospect Worship Service		0	Edit 
<input type="checkbox"/>	Prospective New Member Class		0	Edit 

Workflow - Attendance

Active

Attendance

A member of _____ is marked **present**
1 time in the last 8 weeks.

Match a Individual who is

Present

1

Time(s) in the past

8 weeks

From/in the following Groups

Prospect Worship Service

Group

Add the person to

1st Time Visit

+ Add Action

Done

Workflow

The screenshot displays a workflow management interface with the following components:

- Active Filter:** A checked checkbox labeled "Active" is located at the top left.
- Left Panel:**
 - Time(s) in the past:** A dropdown menu is set to "Present". Below it, a text input field contains the number "2".
 - From/in the following Groups:** A dropdown menu is set to "8 weeks". Below it, a text input field contains "Prospect Worship Service" with a close icon (x).
- Group List:** A central column lists two items, each with a group icon and the label "Group". Each item has a blue arrow pointing to the right.
- Right Panel:**
 - A dropdown menu is set to "Remove the person from".
 - A text input field contains "1st Time Visit" with a close icon (x).
- Bottom Bar:** A green bar on the left contains a "+" icon. A green bar in the center contains "+ Add Action". A blue bar on the right contains the text "Done".

Workflow

The screenshot shows a workflow builder interface for a group membership duration trigger. The interface is divided into three main sections: a configuration panel on the left, a list of actions in the middle, and a description of the selected action on the right.

Configuration Panel (Left):

- At the top left, there is a checkmark and the word "Active".
- Below that is a group icon (two people) and the title "Group — Membership Duration".
- Under the title, it says "Individual has been in **1st Time Visit** for **4 weeks**".
- A section titled "Match a Individual who has been in" contains a text input field with "1st Time Visit x" and a dropdown menu set to "4 weeks".
- A green "+" button is at the bottom left of this panel.

Actions List (Middle):

- The first action is "Interaction" with a speech bubble icon and a blue chevron arrow pointing right.
- The second action is "Update Progress" with a pie chart icon, a hand cursor pointing at it, and a blue chevron arrow pointing right.
- Below these actions is a large grey rectangular area.
- A green bar at the bottom of this section contains a white "+" icon and the text "+ Add Action".

Action Description (Right):

- The description for the selected "Update Progress" action reads: "It will ensure the trigger isn't triggered again for the triggering person." followed by a trash can icon.
- A blue bar at the bottom of this section contains the text "Done".

Workflows - Forms

<https://getstarted.church/webinars/summer-forms>

VBS, Small Groups, and Camps

<https://getstarted.church/webinars/spring-forms>

Guests and Givers, Lead with Your Cause, Engage with Opportunity


<https://getstarted.church/givingresources/winter-forms>

Cause Based Forms, Sign-Up Slots, Storefront Forms

[Purpose Driven Forms – Part 2 \(Giving, Special Events, and Holiday preparations\)](#)

[Purpose Driven Forms – Part 1 \(Getting Ready for Fall\)](#)

[Using Workflows to Track Activity and Involvement](#)



Form Submission

The **VBS 2021** Form is submitted.

When the following form is submitted

VBS 2021

Map

Child (fieldset) to Full Name

Email to Email

Address to Full Address

Date of Birth to Birthday

[Map More Fields](#)

And match Individuals based on

Name

And

Create people who do not match

And

Replace data in matched fields with fo...

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Register for an Upcoming Webinar

Tips for Using Interactions, Mass Contact, and Workflows 08/24/2022 2:00 PM (Central Time) [Register NOW](#)

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Click on a Title to Watch NOW	Presented	
Maximize the Connection Between Your ChMS and Website	07/27/2022	Slides
Tracking Credit Card Activity in ShelbyFinancials	06/29/2022	Slides
Track Mission Trips in ShelbyNext ChMS	05/25/2022	Slides
Summer Forms Webinar Series	05/10/2022	
Database Clean-Up - Fixing Mistakes in ShelbyFinancials	04/27/2022	Slides



Next “Advance Your Knowledge” Webinar

Making, Tracking, and Reporting Budgets

Date: 9/28/22

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

Led by: Ben Lane & Mark Crain

Shelby Staff Trainers



Virtual Workshops

Virtual Training Workshops (filling up fast)

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!!!

[Click here to Register](#)

