

The background features a blurred image of a laptop on the left and a stack of several books on the right, all in a light blue color scheme. The text is overlaid on this background.

**SHELBY SYSTEMS®**

**Advance Your Knowledge**

**Webinar Series**

**Tracking Volunteers Using ChMS Scheduling  
And Worship Planning**

**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**

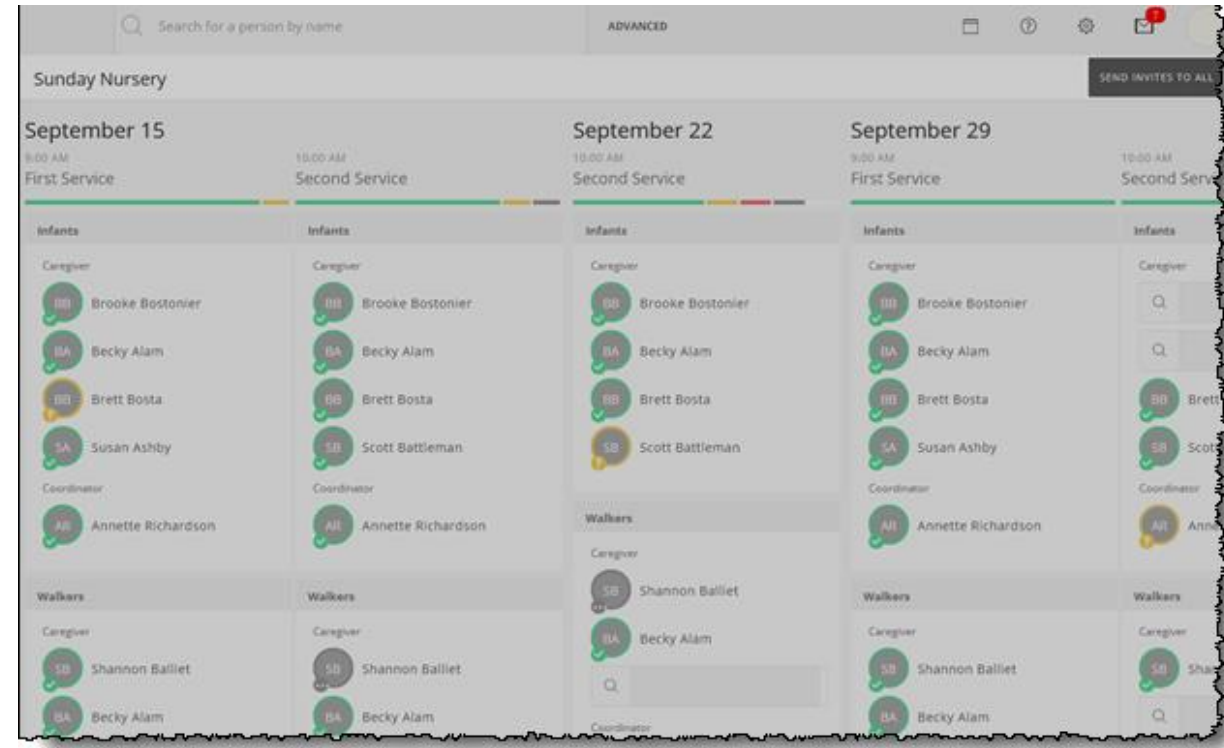
ShelbyNext Trainer



# ChMS Schedules

Schedules allow administrators to do several items:

- Create or edit plan templates
- Create a Schedule for a specific date/time
- Add individuals to a schedule (or copy from a past schedule)
- Send invitations and track responses (automatically or manually)
- Communicate with scheduled individuals



# Create a Schedule

- To create a new schedule, click on the Schedules menu item, then the Create a Schedule button. 

Create a Schedule

**Basic Schedule Info**

Schedule Name

Repeat Weekly  Starting On

Repeat Weekly  Occuring On

**NEXT**

## Create a Schedule

- Schedules allows for multiple sets of volunteers to serve at multiple times on the same day.
- Add as many times per day as needed.
- “Teams of volunteers” can cover specific subgroups, like classes, with more than one person/position
- “Just volunteers” are for single positions filled by as many people as you may need.

**When do you need volunteers?**

Time Name

Start Time                      End Time

**Tell us about the volunteers you need.**

[Teams of volunteers](#) or [just volunteers](#).

## Create a Schedule

- Three important designations for each position
  - How Many of that position are needed
  - Source Group
    - Instead of searching your entire ChMS database, you can limit available volunteers down to a specific group.
- Require Background Check
  - Only volunteers that have a completed [Protect My Ministry](#) background check will appear.

Position Name	How Many	Source Group (Optional)
<input type="text" value="Helper"/>	<input type="text" value="2"/>	<input type="text"/>
<input type="checkbox"/> Require Background Check		

# Scheduling Volunteers

November 14, 2021 📅

9:00 AM 1st Service	10:30 AM 2nd Service
<b>Greeters</b>	<b>Greeters</b>
Greeter 1	Greeter 1
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
Greeter 2	Greeter 2
<input type="text"/>	<input type="text"/>

[Add Week](#)

# Schedule Day Options

**November 14, 2021** [🗨️] [⋮]

- Copy Volunteers from Previous
- Send Invites
- Mark All as Confirmed
- Contact November 14, 2021 Volunteers

---

- Edit Date
- Remove Day
- Add Details

**COPY VOLUNTEERS** [X]

November 14, 2021 [^]

- November 14, 2021
- November 7, 2021
- October 31, 2021

**DETAILS FOR NOVEMBER 14, 2021** [X]

Details

**B I** | [List Icon] | [List Icon] | [Link Icon] | [Comment Icon]

Use Schedule Details to update volunteers on information around the event(s) that are serving for. Include details on protocols and lesson information available to the team.

Apply Changes To Future Schedules

[Cancel] [Save]



# Managing Schedules

- Searching for Volunteers
- Send Invites to All
  - Email address REQUIRED!
- 5 Distinct Status Messages
  - Not Notified
  - No Email Address on File
  - Notified
  - Confirmed
  - Declined

Children's Classes

Send Invites To All

The screenshot displays a grid of volunteer schedules for Children's Classes on November 14, 2021. The interface is organized into three columns, each representing a different service. Each column has a header with the date and time, and a summary box showing the number of volunteers in various statuses: Confirmed, Notified, Pending, and Declined. Below the headers are sections for '1st & 2nd Grade' and '3rd & 4th Grade', each with 'Helper' and 'Teacher' roles. Volunteers are listed with their initials and names, accompanied by status icons: a question mark for 'Notified', a checkmark for 'Confirmed', and a red exclamation mark for 'Declined'. Search bars are provided for each role in each grade section.

Service	Summary	1st & 2nd Grade	3rd & 4th Grade
First Service <td>6 Pending</td> <td> <ul style="list-style-type: none"> <li>Helper: MA Moose Adams (Notified), SB Sam Baker (Notified)</li> <li>Teacher: RG Rhonda Grayson (Declined)</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>Helper: MC Mark B Crain (Notified), AA Abby Adams (Notified)</li> <li>Teacher: BA Bubba Adams (Notified)</li> </ul> </td>	6 Pending	<ul style="list-style-type: none"> <li>Helper: MA Moose Adams (Notified), SB Sam Baker (Notified)</li> <li>Teacher: RG Rhonda Grayson (Declined)</li> </ul>	<ul style="list-style-type: none"> <li>Helper: MC Mark B Crain (Notified), AA Abby Adams (Notified)</li> <li>Teacher: BA Bubba Adams (Notified)</li> </ul>
First Service	3 Confirmed, 2 Notified, 1 Declined	<ul style="list-style-type: none"> <li>Helper: MA Moose Adams (Notified), SB Sam Baker (Notified)</li> <li>Teacher: RG Rhonda Grayson (Confirmed)</li> </ul>	<ul style="list-style-type: none"> <li>Helper: MC Mark B Crain (Notified), AA Abby Adams (Confirmed)</li> <li>Teacher: BA Bubba Adams (Confirmed)</li> </ul>

# Reminders

REMINDER FOR NOVEMBER 14, 2021 ✕

Reminder ON

Send As  
 Email  SMS Text  Email & Text

Include Pending 🚫 2 Missing Contact Info >

You are scheduled to serve Nov 14, 2021 for Children's Classes. For details, you can view your schedule here

1 day  before at 10:00 am

Apply Changes To Future Schedules Cancel Save

# Worship Planning

training1 Shelby

EVENTS SCHEDULE LIBRARY PEOPLE MORE

STACI SAMPSON

ALL MY ASSIGNMENTS

NOV 7 - 10 AM @ SANCTUARY

NOV 14 - 10 AM @ SANCTUARY

NOV 14 - 10 AM @ OUTDOOR SERVICE

NOV 21 - 10 AM @ SANCTUARY

NOV 28 - 10 AM @ SANCTUARY

## Nov 7 - 10 AM @ Sanctuary

### Event Flow

LIKE
 MY notes

Start	Element Type	Title	Led By
9:55a	Exciting Video		Lisa Currie - AV
5m	Countdown		
<b>Service Start</b>			
10a	Greeting		
1m			
<b>Worship Set</b>			
10:01a	Worship Song	<a href="#">A Greater Song</a>	Lead Vocals
4m			
10:05a	Worship Song	<a href="#">A Mighty Fortress Is Our God (Ein Feste Burg)</a>	Lead Vocals
4m			
10:09a	Offering		
5m			

Element Note: Don't forget to talk about the cafe being open

### ASSIGNMENTS

#### Worship Band

- BASS GUITAR
- LEAD VOCALS
- ELECTRIC GUITAR  
Bill Black
- LEAD VOCALS  
Bill Black
- KEYS  
Linda Johnson
- AV  
Lisa Currie
- DRUMS  
Martha Washington
- ACOUSTIC GUITAR  
Mary Sue Adamson

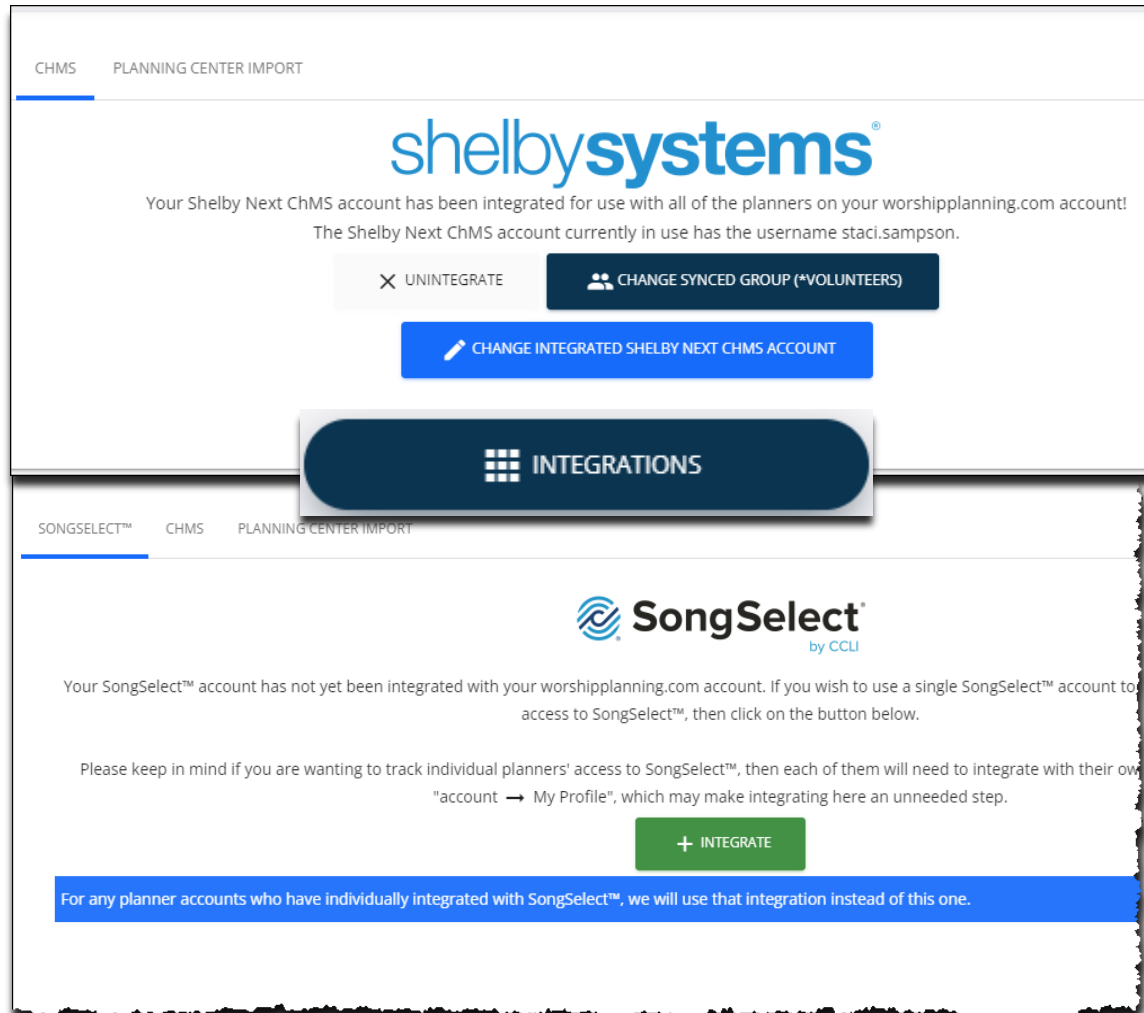
ALL LOCATIONS

### November

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

CALENDAR FEED

# Integrations



CHMS PLANNING CENTER IMPORT

**shelbysystems**

Your Shelby Next ChMS account has been integrated for use with all of the planners on your worshipplanning.com account!  
The Shelby Next ChMS account currently in use has the username staci.sampson.

X UNINTEGRATE CHANGE SYNCED GROUP (\*VOLUNTEERS)

CHANGE INTEGRATED SHELBY NEXT CHMS ACCOUNT

INTEGRATIONS

SONGSELECT™ CHMS PLANNING CENTER IMPORT

**SongSelect**  
by CCLI

Your SongSelect™ account has not yet been integrated with your worshipplanning.com account. If you wish to use a single SongSelect™ account to access to SongSelect™, then click on the button below.

Please keep in mind if you are wanting to track individual planners' access to SongSelect™, then each of them will need to integrate with their own "account → My Profile", which may make integrating here an unneeded step.

+ INTEGRATE

For any planner accounts who have individually integrated with SongSelect™, we will use that integration instead of this one.

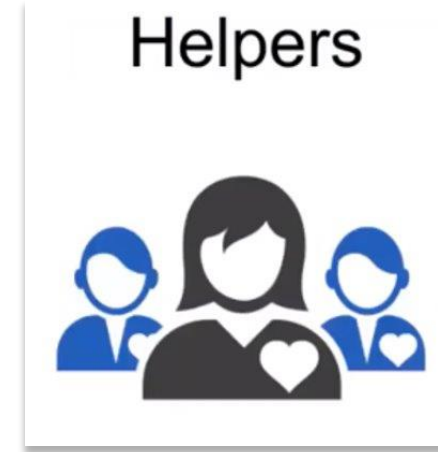
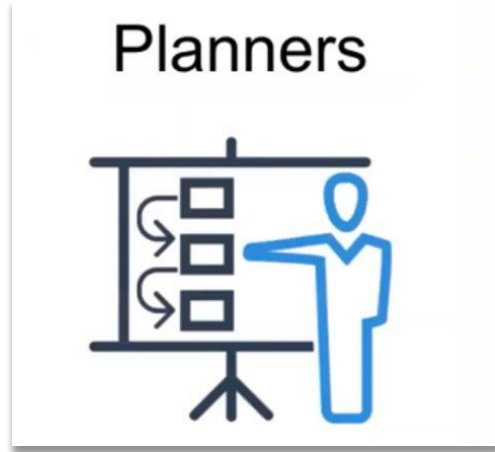
## ChMS Integration:

- Make a master group of volunteers to import in

## SongSelect Integration:

- Allows all planners to have access to one SongSelect account.
- **Note:** Planners can also sync individual accounts from their My Profile page.

# Planners & Helpers



- Creating and Adding Content in Worship Planning...
- Up to 5 Planners for free

- Unlimited** number of helpers
- Helpers are everyone else*** and need access to Worship Planning to view information that's helpful for them (i.e., volunteers that are filling Roles)

# Roles/Skills

































Set roles that will be used in assignments for a particular person.

You can also define what skills are needed for that role.

## Roles / Skills

These roles are used with people

[+ ADD A ROLE](#)

Name	Icon	Description	
Acoustic Guitar			  
AV		Running tech in the background	  
Bass Guitar			  
Drums			  
Electric Guitar			  
Keys			  
Lead Vocals			  
Vocals			  

# Teams

Name	Led By	Event Flows	Sign-up <i>i</i>	Members	Reminder	Location(s)
First Impressions				3		
Ushers				5		Sanctuary
Worship Band	Staci Sampson (that's you)	Can View		7		Outdoor Service Sanctuary Small Chapel

Allows you to:

- Set notifications, reminders, & responses
- Assign Members, Leaders, & Roles
- Create templates to use in service planning
- View a calendar of availability
- Upload files

# Events

## All Events

[+ CREATE NEW EVENT\(S\)](#)

 Services in Location **ALL LOCATIONS**


From

To

Oct 31, 2021

Nov 28, 2021

[FILTER BY DATE](#)

Date/Time ▾

Linked To

Series

Topic

Updated By



Sun, Nov 7 - 10 AM

Long Story Short

Week 1: The Beginning

Staci Sampson



Sun, Nov 14 - 10 AM

Long Story Short

Week 2: Abraham

Staci Sampson



Sun, Nov 21 - 10 AM

Long Story Short

Week 3: Issac

Staci Sampson



Sun, Nov 28 - 10 AM

Long Story Short

Week 4: Moses

Staci Sampson





# Events: Event Flow

Nov 7, 2021 · 10:00 AM @ Sanctuary

--- More Event Information

EVENT FLOW ASSIGNMENTS STAGE SETUP REHEARSAL

Start	Element Type	Title	Leader
9:55 (5m)	Exciting Video Countdown		Lisa Currie - AV
<b>Service Start</b>			
10:00 (1m)	Greeting		
<b>Worship Set</b>			
10:01 (4m)	Worship Song	A Greater Song	Lead Vocals
10:05 (4m)	Worship Song	A Mighty Fortress Is Our God (Ein Feste Burg)	Lead Vocals
10:09 (5m)	Offering		
10:14 (4m)	Worship Song	10,000 Reasons (Bless The Lord)	Lead Vocals
<b>Sermon</b>			
10:18 (30m)	Sermon		
10:48 (10m)			

- Set the **Duration**, **Element Type**, **Title** (for songs), and **Leader** for various parts of the event
- Notes can be left on each Element
- Drag and Drop organization
- Templates!

# Events: Assignments by Service

TEAMS PEOPLE ROLES

Worship Band

Filter users & roles

Assign entire team

Week 1

- Bill Black Electric Guitar
- Linda Johnson Keys
- Lisa Currie AV
- Martha Washington Drums
- Mary Sue Adamson Vocals
- Staci Sampson
- William Ross Lead Vocals
- Acoustic Guitar

Nov 7 - 10:00 AM @ Sanctuary

Nov 14 - 10:00 AM @ Outdoor Service

SEND NOTIFICATIONS

EVENT FLOW ASSIGNMENTS STAGE SETUP REHEARSAL

Worship Band

- Acoustic Guitar Mary Sue Ada...
- AV Lisa Currie
- Bass Guitar
- Drums Martha Washi...
- Electric Guitar Bill Black
- Keys Linda Johnson
- Lead Vocals
- Lead Vocals Bill Black

Assign by:

- Entire Team
- Team Template
- Individuals
- Roles

Once assigning is done, click Send Notifications:

### Send Notifications

Use the checkboxes to indicate the teams and services for which you'd like to send notifications.

**Which Events?**

Showing events in all locations

Select All Events

Sun, Nov 7, 2021 - 10 AM @ Sanctuary

**Which Teams?**

All Teams

Only teams I lead

First Impressions \*

Ushers \*

\* You don't lead this team, but you can still send out notifications.

**Which Status(es)?**

All Statuses

Default (Penciled In only)

Notification Unable to be Sent

Penciled In

Awaiting Response

Accepted

Declined

Tentatively Accepted

Subject

You Have Been Scheduled to Serve

Body

I have scheduled you to serve on the date(s) and time(s) listed below. Please use the links to respond, which lets me know if you can make it.

If you would like these and future scheduling's to automatically appear in your personal calendar, find the 'assignment feed' link on the Home page after you accept scheduling's. Check out this page for more info: <http://wplink.me/calFeed>.

# Events: Assignments by Multiple Services

The screenshot displays a software interface for managing event assignments. At the top, a navigation bar includes 'training1Shelby', a home icon, and menu items for 'EVENTS', 'SCHEDULE', 'LIBRARY', 'PEOPLE', and 'MORE'. Below this, a secondary bar shows '← ALL SERVICES' and 'ALL LOCATIONS'. A left sidebar is titled 'Worship Band' and contains a search filter 'Filter users & roles', an 'Assign entire team' button, and a list of team members: Bill Black (Electric Guitar), Linda Johnson (Keys), Lisa Currie (AV), Martha Washington (Drums), Mary Sue Adamson (Vocals), and Staci Sampson. The main area features three event cards for 'Nov 7 - 10 AM @ Sanctuary', 'Nov 14 - 10 AM @ Sanctuary', and 'Nov 21 - 10 AM @ Sanctuary'. Each card lists the same set of roles: Acoustic Guitar, AV, Bass Guitar, Drums, Electric Guitar, Keys, and Lead Vocals. The assignments for the first event are: Acoustic Guitar (Mary Sue Ada...), AV (Lisa Currie), Bass Guitar, Drums (Martha Washi...), Electric Guitar (Bill Black), Keys (Linda Johnson), and Lead Vocals. The second and third events show the same roles but with some assignments missing or partially obscured.

# Managing Assignments

training1Shelby

EVENTS SCHEDULE LIBRARY PEOPLE MORE

STACI SAMPSON

ALL MY ASSIGNMENTS

NOV 7 - 10 AM @ SANCTUARY

NOV 14 - 10 AM @ SANCTUARY

NOV 14 - 10 AM @ OUTDOOR SERVICE

NOV 21 - 10 AM @ SANCTUARY

NOV 28 - 10 AM @ SANCTUARY

## Nov 7 - 10 AM @ Sanctuary

Event Flow

YouTube PDF Print LIKE MY notes

Start	Element Type	Title	Led By
9:55a	Exciting Video		Lisa Currie - AV
5m	Countdown		AV
<b>Service Start</b>			
10a	Greeting		
1m			
<b>Worship Set</b>			
10:01a	Worship Song	A Greater Song	Lead Vocals
4m			
10:05a	Worship Song	A Mighty Fortress Is Our God (Ein Feste Burg)	Lead Vocals
4m			
10:09a	Offering		
5m			

Element Note: Don't forget to talk about the cafe being open

ASSIGNMENTS

Worship Band

- BASS GUITAR
- LEAD VOCALS
- Bill Black **Accepted**
- AD VOCALS **Declined**
- KEYS **Awaiting Response**
- AV **Awaiting Response**
- Lisa Currie
- DRUMS **Tentatively Accepted**
- Martha Washington
- ACOUSTIC GUITAR
- Mary Sue Adamson

ALL LOCATIONS

November

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

CALENDAR FEED

# My Assignments

Helpers (volunteers) can manage their schedules:

- Accepted, Declined, or mark as Tentative assignment requests
- Mark preferred availability

The screenshot displays the 'My Assignments' interface. On the left, a sidebar lists assignment dates and locations: NOV 7 - 10 AM @ SANCTUARY, NOV 14 - 10 AM @ SANCTUARY, NOV 14 - 10 AM @ OUTDOOR SERVICE, NOV 21 - 10 AM @ SANCTUARY, and NOV 28 - 10 AM @ SANCTUARY. The main area is titled 'My Assignments' and lists three tasks, each with a green checkmark icon and a 'Vocals' icon:

- Vocals** (Nov 14 - 10 AM @ Sanctuary): You've accepted this assignment. Click here to change your response
- Vocals** (Nov 21 - 10 AM @ Sanctuary): You've accepted this assignment. Click here to change your response
- Acoustic Guitar** (Nov 21 - 10 AM @ Sanctuary): You've accepted this assignment. Click here to change your response

On the right, a calendar view for November is shown. A red arrow points from the 'ALL LOCATIONS' dropdown menu to a dialog box that appears over the calendar. The dialog box contains the following options:

- MARK AS UNAVAILABLE (with a red 'x' icon)
- PREFER THIS DAY (with a blue checkmark icon)

At the bottom of the calendar view, there is a 'CALENDAR FEED' link.

# Which is Right for Me?

## ChMS Schedules

- Allows you to simply schedule your people
- Built directly into ChMS
- If you are not responsible for planning services, focus on volunteers only

## Worship Planning

- Allows you to set detailed plans
- Integrates with SongSelect
- If you are responsible for all of volunteer management **INCLUDING** planning worship services

# 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**

The screenshot shows a webpage for the 'Advance Your Knowledge Webinar Series'. At the top, there's a blue header with the text 'Advance Your Knowledge Webinar Series'. Below that, a grey section titled 'Register for an Upcoming Webinar' features a table with one row: 'Tracking Volunteers Using Worship Planning and ChMS Scheduling' on 11/10/2021 at 2:00 PM (Central Time), with a 'Register NOW' button. A second grey section titled 'Watch a Previous Webinar' contains a table with columns 'Click on a Title to Watch NOW' and 'Presented'. It lists four previous webinars, each with a 'Slides' button for download.

Register for an Upcoming Webinar	
Tracking Volunteers Using Worship Planning and ChMS Scheduling	11/10/2021 2:00 PM (Central Time) <a href="#">Register NOW</a>

Watch a Previous 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 <a href="#">Slides</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</a>	08/11/2021 <a href="#">Slides</a>

# Next “Advance Your Knowledge” Webinar

## Useful Tips Regarding Giving Statements

**January 12, 2022**

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

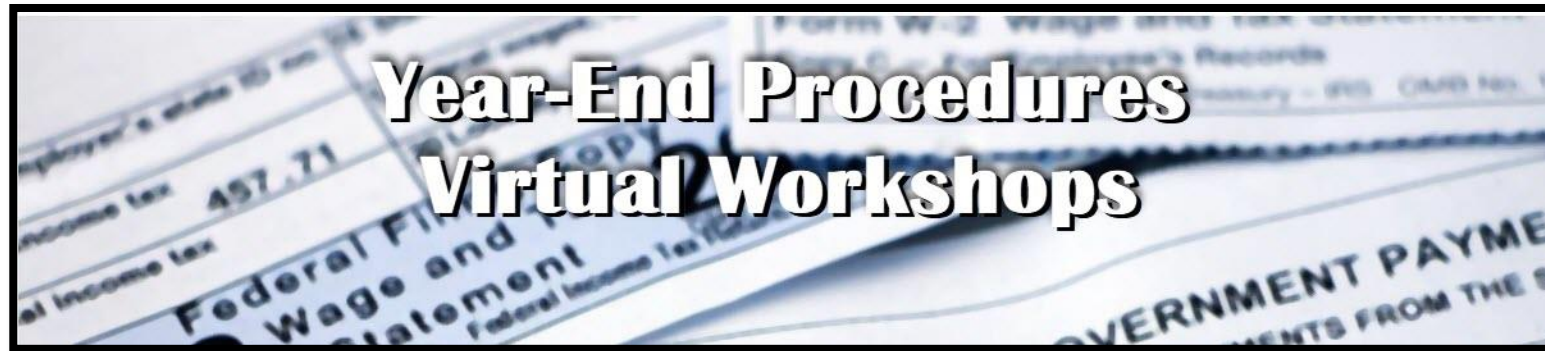
In this webinar, your presenters will lay out several things to remember when preparing for, designing, and sending out Giving Statements to donors. Whether you track pledges or not, snail mail or email statements, or use Arena, ChMS (ShelbyNext Membership), or Online Giving, there will be good information to benefit your processes. Join Staff Trainer duo, Ben Lane and Mark Crain for a quick look at Useful Tips Regarding Giving Statements.

[https://ministrybrands.zoom.us/webinar/register/WN\\_Yt0lziZRRSu98DwSeFQrAg](https://ministrybrands.zoom.us/webinar/register/WN_Yt0lziZRRSu98DwSeFQrAg)



# Virtual Workshops

Financials 101 & ChMS 101 Virtual Workshops will return with some new features in 2022



New for December and January, we will be offering a two-hour workshop covering the essentials of **Year-End Procedures**. To accommodate your schedule and to keep the sessions smaller, we will be offering this workshop on most Tuesdays and Thursdays during these two months.

- **Low cost** - \$50 per attendee
- **Virtual Classroom Environment** – small group with interactive discussion and lecture
- **A Detailed Workbook** – step by step guide to many of the most common procedures
- [Sign up now](#) or watch for an email with more info next week

# Virtual Workshops

**New for 2022**



201 Virtual Workshops for those who are beyond the basics and who need extra tips, tricks, best practices, and maybe even some outside the box thinking. These workshops will be presented weekly as separate sessions that can be purchased individually or as a set.

## Shelby 201 Virtual Workshops

ShelbyFinancials 201	ChMS 201
<ul style="list-style-type: none"> <li>• 201 General Ledger</li> <li>• 201 Accounts Payable &amp; Bank Account Management</li> <li>• 201 Payroll</li> <li>• 201 Financial Reports</li> </ul>	<ul style="list-style-type: none"> <li>• 201 Record Management</li> <li>• 201 Groups &amp; Volunteer Management</li> <li>• 201 Forms</li> <li>• 201 Giving &amp; Online Giving</li> </ul>

Watch for details soon . . .

# 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)

[Worship Planning  
Overview](#)

[Worship Planning 101](#)

[Create a Schedule  
Template](#)