

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 light, airy blue with soft bokeh light effects.

SHELBYSYSTEMS®

Advance Your Knowledge

Webinar Series

Using ShelbyNext Mobile Apps to Connect with Leaders and Members

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.

Our Panelists...

Carmen Dea
ShelbyNext Trainer



Maggie Emerson
Web/Mobile Account Manager

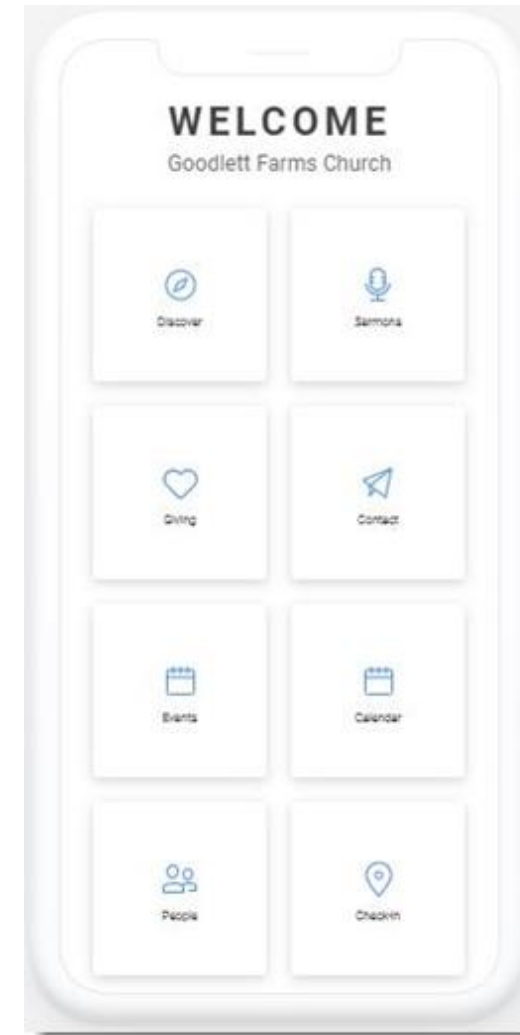
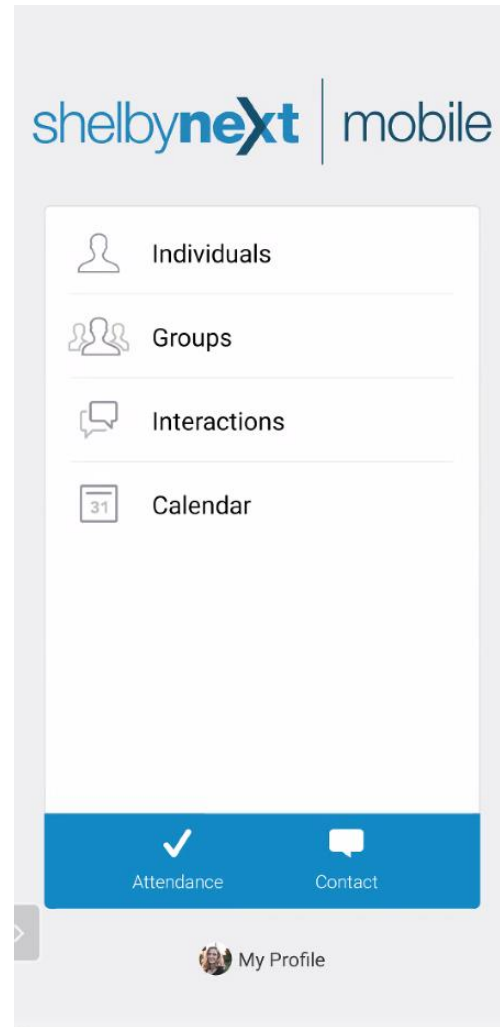


More Information

- For more information, click on the links provided throughout this Webinar.
- Also, reference links will also be posted in the Chat box throughout the presentation.
- Yes! This webinar will be available to view again. We'll share how at the end of this presentation.

Two Free Apps are included with ShelbyNext Membership!

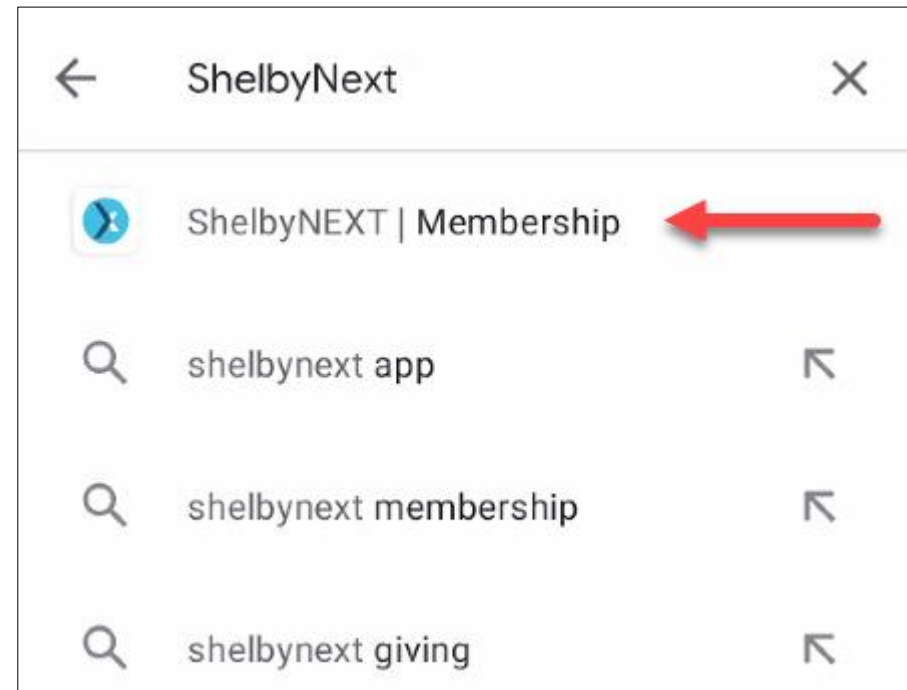
- ShelbyNext Membership is designed primarily for Staff and Key Volunteers
- MinistryOne App (M1) is for Everyone



Let's start with ShelbyNext Membership App

How to download...

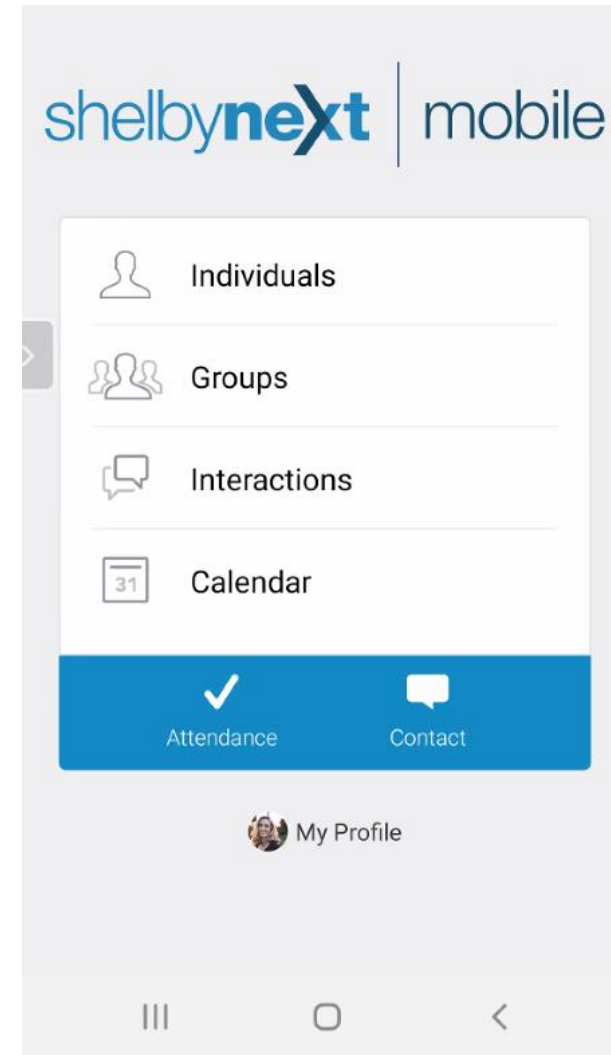
- Search for *ShelbyNext Membership* in your **App Store** (IOS) or **Google Play** (Android)
- Also, Shelby Systems displays responsively on your mobile device via a mobile browser.



<https://documentation.shelbynextchms.com/external/article/1575?l=37>

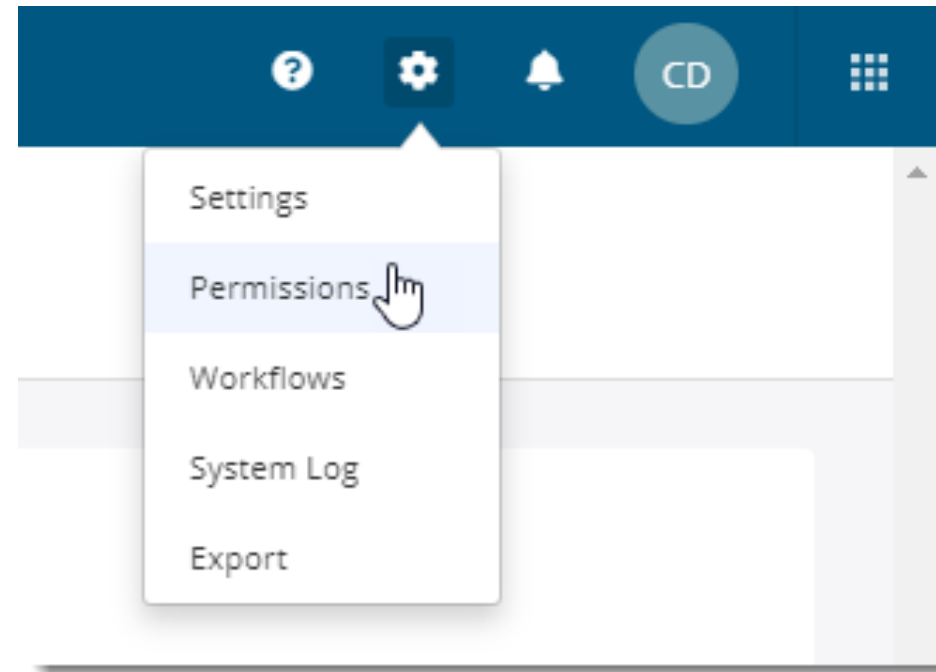
ShelbyNext Membership Home Screen

- Permissions will determine what is available on the Home screen



Permissions

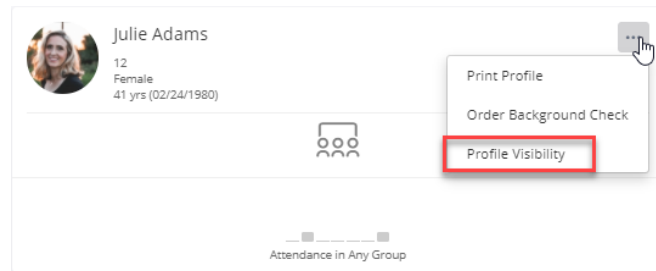
- Permissions play a large role in who and what can be seen or edited with the ShelbyNext Membership App
- The App uses the same username and password, along with assigned permissions, as the standard login using the URL.
- There are three types of Permissions...
 - Global
 - Roles
 - Group Leader Roles



<https://documentation.shelbynextchms.com/external/article/1487?l=37>

Permissions - Global

- Global Permissions pertain to everyone, even those who have a Role or Group Leader Role.
- It controls whether users can update or propose changes to their own and family members information along with profile images.
- Determines whether users can create their own accounts from the login menu “New User? Create an account”.
 - If the new account does not match to an existing record, that individual will be added to ShelbyNext, and the group provided in the drop-down menu.
- You can also assign usernames and passwords from a user’s account or everyone in a group or groups.
- This is where you turn on the Online Directory. You will need a group designated for the Online Directory.
- What fields are visible for those viewing the Online Directory. There is the ability to limit what can be seen, by individual, from Profile Visibility on their profile page.



Permissions - Roles

- Roles are groupings of Permissions. For example, what information can be viewed or edited. Taking Attendance, Posting Contributions, Running Reports, Adding or Editing Groups, etc.
- Some users need to access to all information. That's usually going to require Admin rights. Anything less than Admin rights, needs a role.
- There is also the limit of who can be viewed. Anyone in ShelbyNext Membership or just individuals within a specific group?
- If the user can view anyone in the database, as is common with most staff, but are limited to only being able to propose an edit to basic demographic information but not be able to see giving data, that is usually done through a role.
- Those role permissions will also apply in the ShelbyNext Membership App.

The screenshot shows the 'Roles' management page. At the top, there are tabs for 'Global', 'Roles', and 'Leader Roles', with 'Roles' selected. Below the tabs is a descriptive text: 'Permissions allow you to control who can access different features. To use permissions, you create a Role, edit that Role's permissions, and assign the Role to specific Individuals.' The main content area lists several roles: 'Admin', 'Contribution Processing', 'Financial Secretary', 'Priest', and 'Staff'. Each role has a list of assigned users with a trash icon for removal. The 'Admin' role has three users: 'Dina Mite(466)', 'Lanette Stewart(1710)', and a partially visible user. The 'Staff' role has one user: 'Julie Adams(12)'. At the bottom, there is an 'Add Role' section with a 'Role Name' field containing the placeholder text 'Enter role title...'. A blue 'Save' button is located at the bottom left of the interface.

Permissions – Leader Roles

- Leader Roles are used primarily for volunteers who only need to...
 - View people in Groups where they are a leader
 - Take Attendance just for their group
 - View Attendance Reports for their group
 - Use Interactions with their group members
 - Email or Text their group members

Edit Group

List Add Finder

Name
Small Groups - Women's Bible Study

Choose Leader(s)
**Leader Role permissions are set up for leader(s) of this Group

Search...

Current Leader(s)
Julie Adams (12) ✕

Julie Adams

Profile Edit Family Timeline Giving Account

Credentials

Username
[Redacted]

Password
[Redacted]

To change the password, enter the new password in both boxes.

Confirm Password
[Redacted]

Passwords do not match.

[Login As This User](#)

Roles

Leader Role permissions, based on Group leadership.

- Admin
- Contribution Processing
- Financial Secretary
- Priest
- Staff

Groups

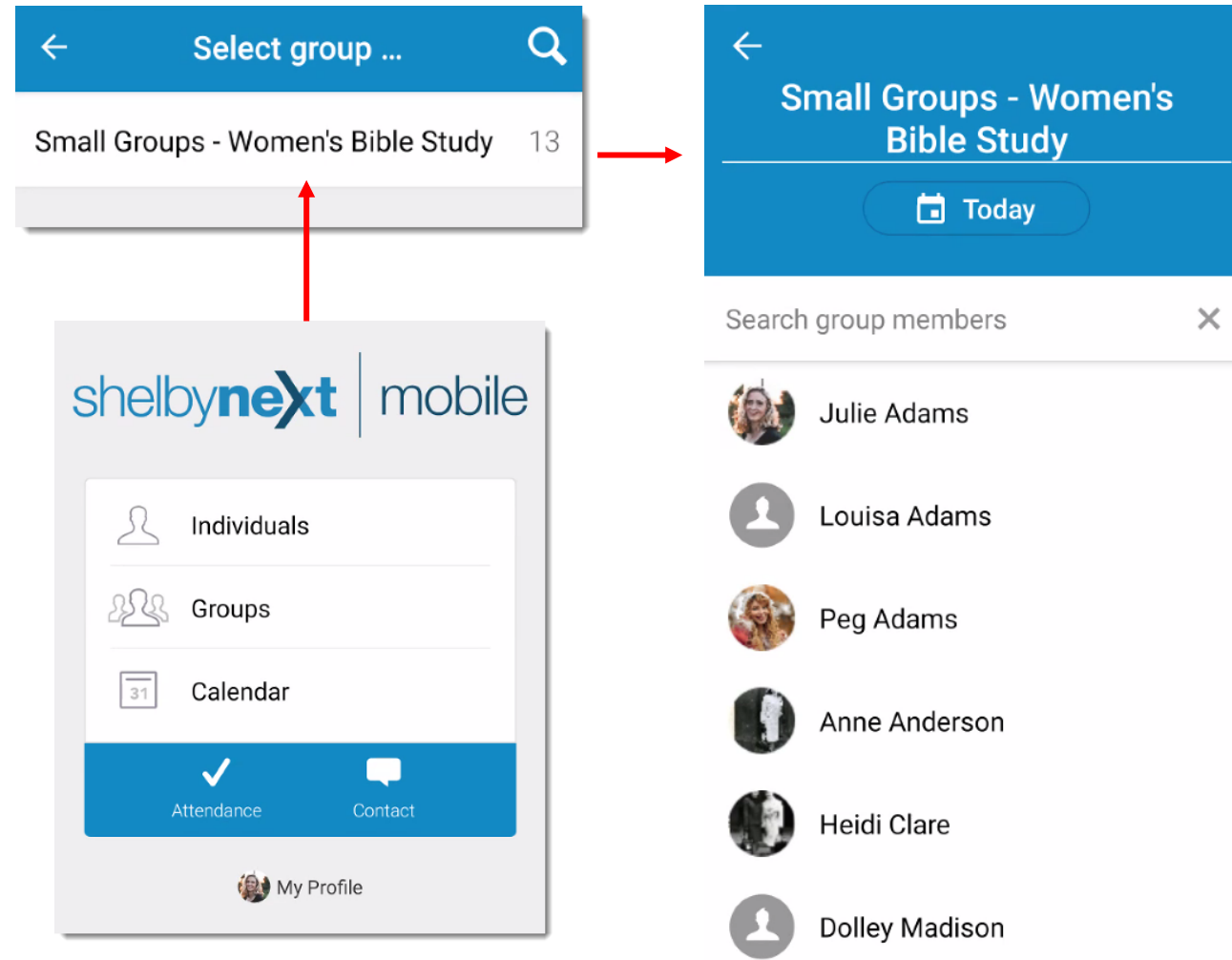
The Leaders of the following groups can use these permissions in their groups.

Groups

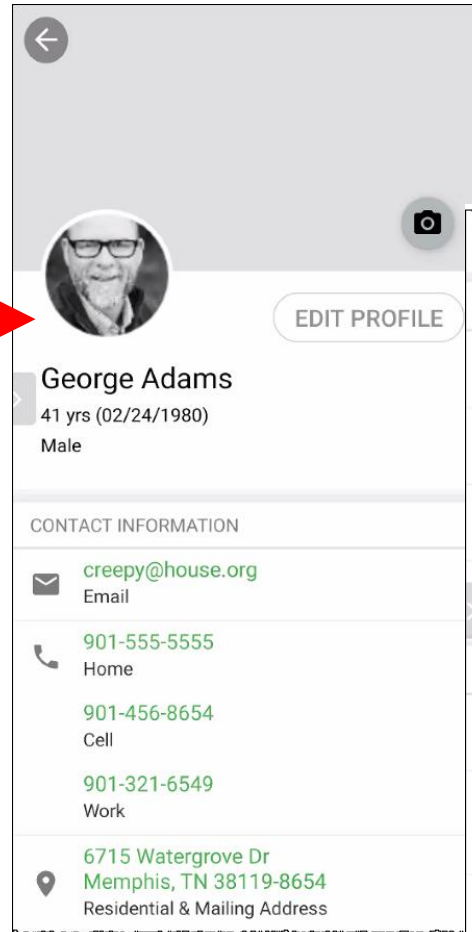
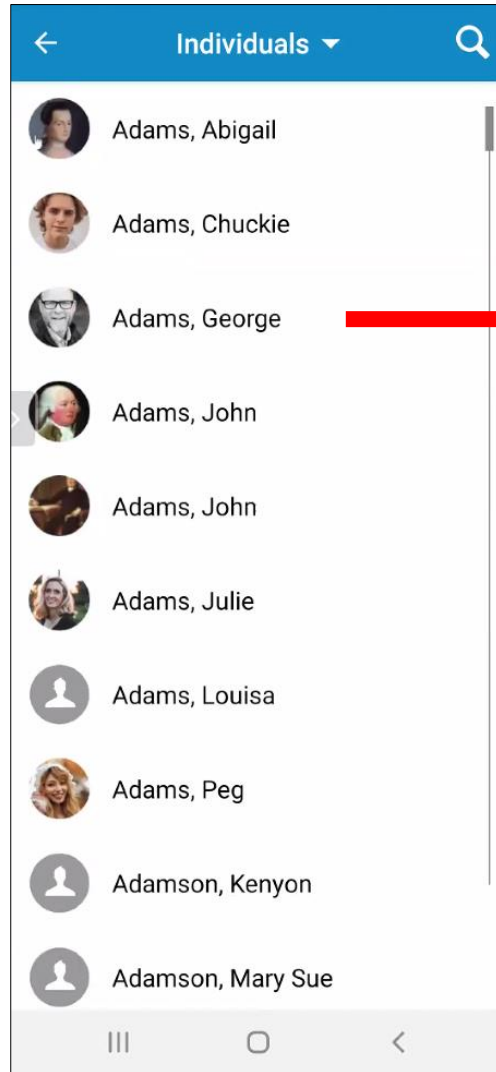
- ✕ Small Groups - Women's Bible Study
- ✕ Sunday School ADLTLADY Adult 2 Ladies Class
- ✕ Sunday School ADLTLADY Adult 3 Ladies Class
- ✕ Sunday School ADLTLADY Adult 4 Ladies Class
- ✕ Sunday School ADLTLADY Adult 5 Ladies Class
- ✕ Sunday School ADLTLADY Adult 6 Ladies
- ✕ Sunday School ADLTMEN Adult 2 Men's Class

What does ShelbyNext Membership App look like to a Group Leader?

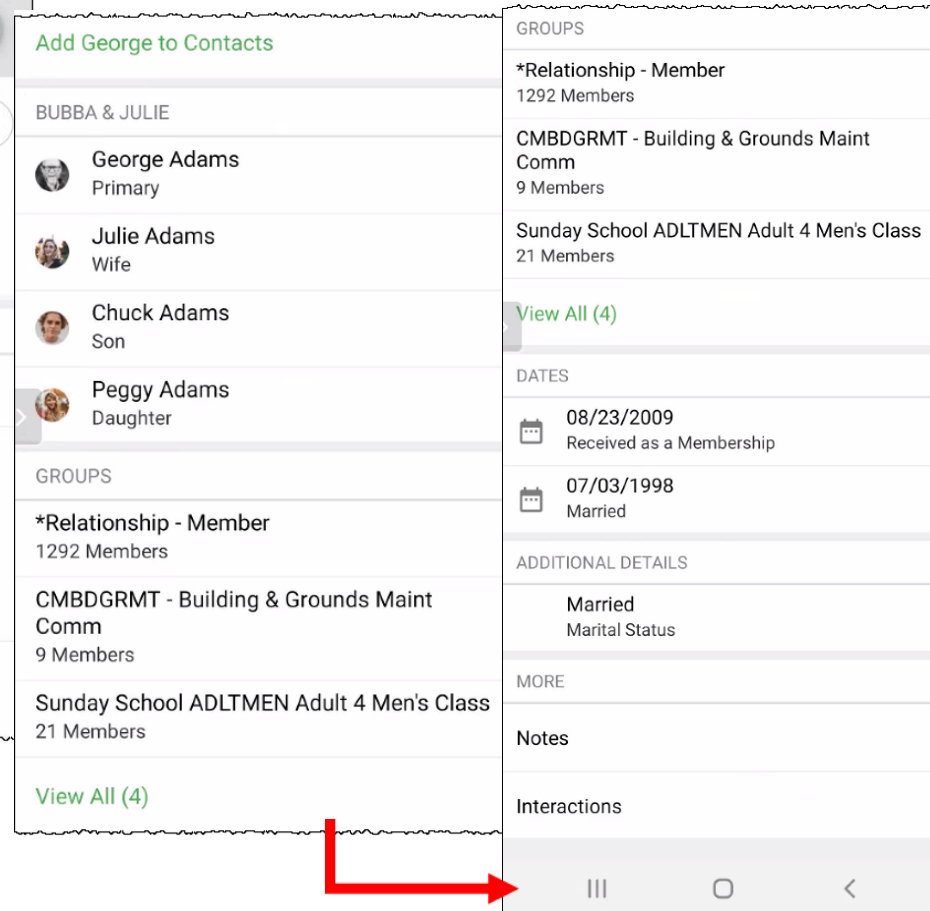
- If you've given the group leaders permissions to take attendance, they will have the check mark on their home screen. They can only see and take attendance for the group(s) where they are a group leader
- Only see themselves, their family, and their group members under Individuals and Groups.
- If Directory is activated, they can see everyone in the Directory as long as they too are in the Directory.



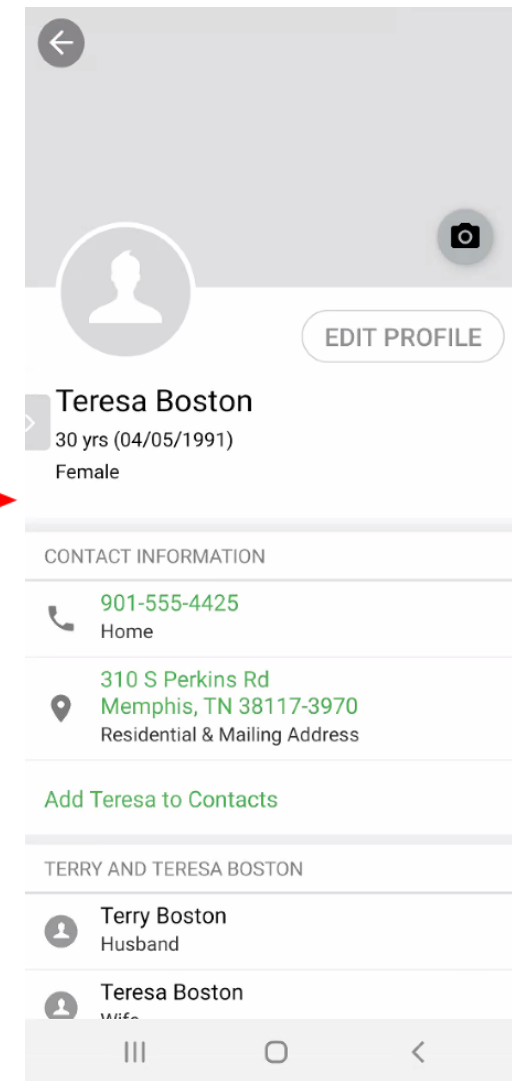
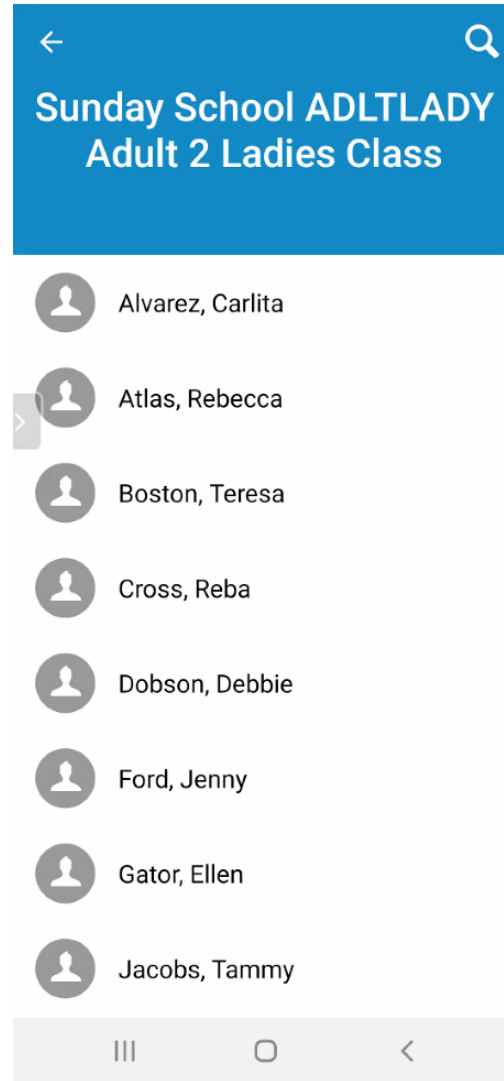
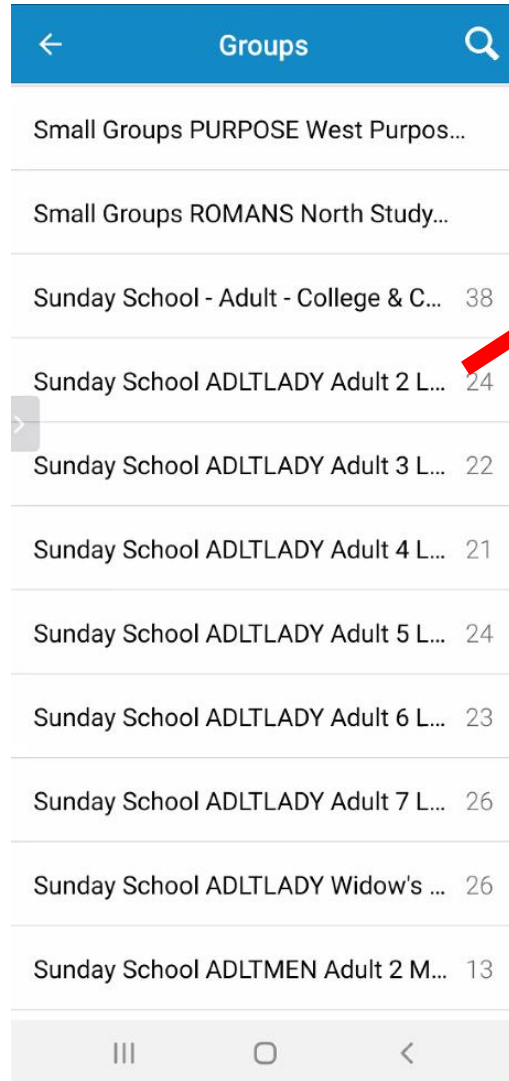
Individuals – Tap to open and edit according to user permissions



The Directory, if turned on, can be seen by tapping on the down arrow next to Individuals.



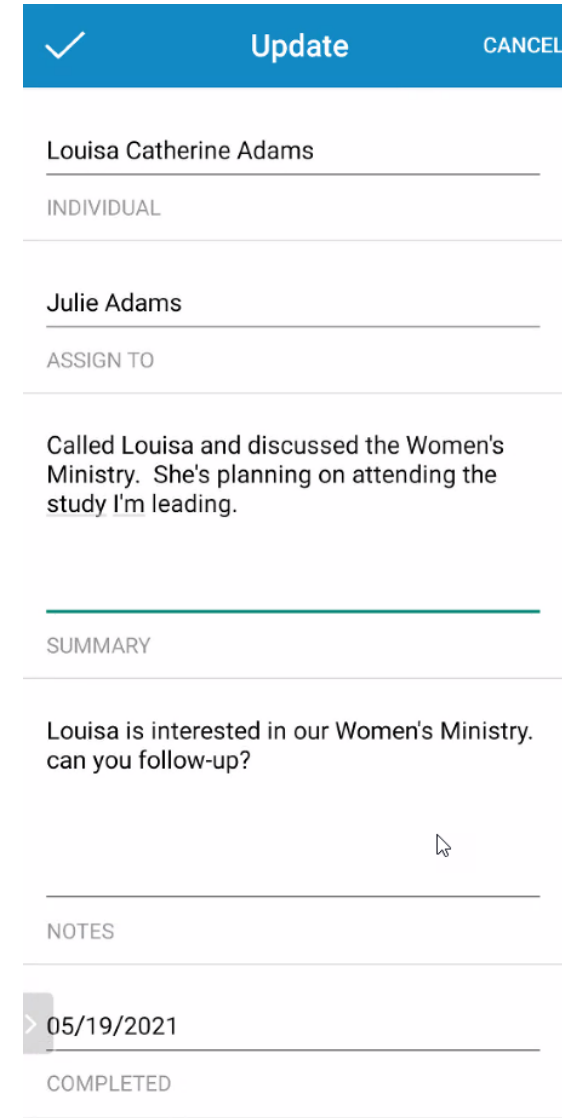
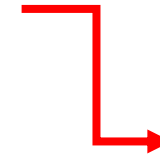
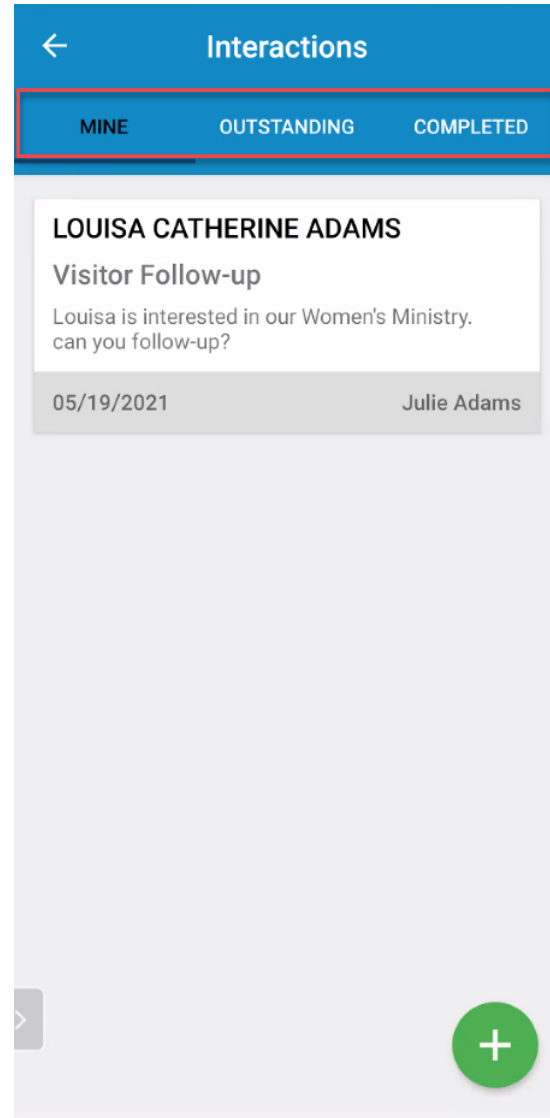
Groups – User permissions determine what can be seen or edited



Interactions on the Go!

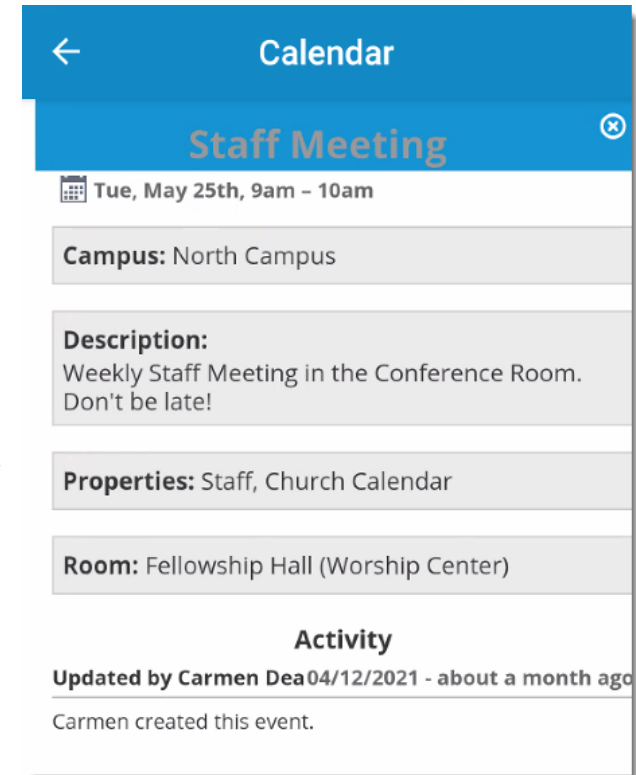
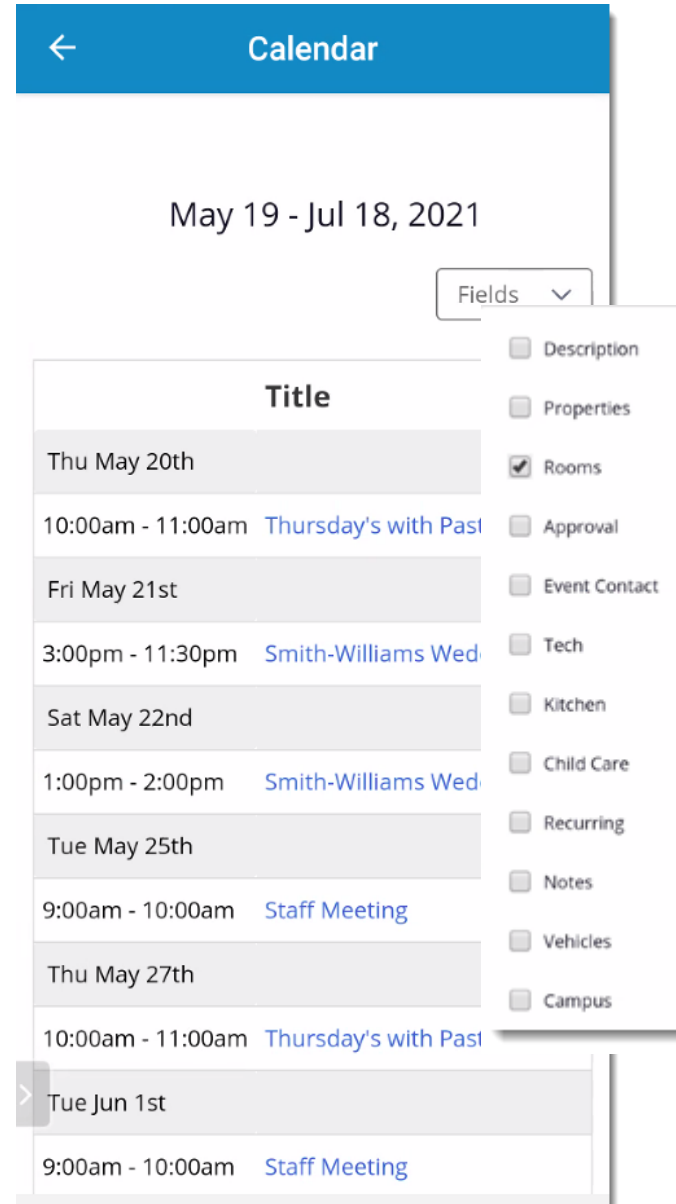
Users can view their own or others Outstanding and Completed Interactions

- First time visitors
- Hospital Visits
- Pastoral Care
- Prayer Requests
- Funerals
- Death of Loved Ones
- Benevolence
- Etc.



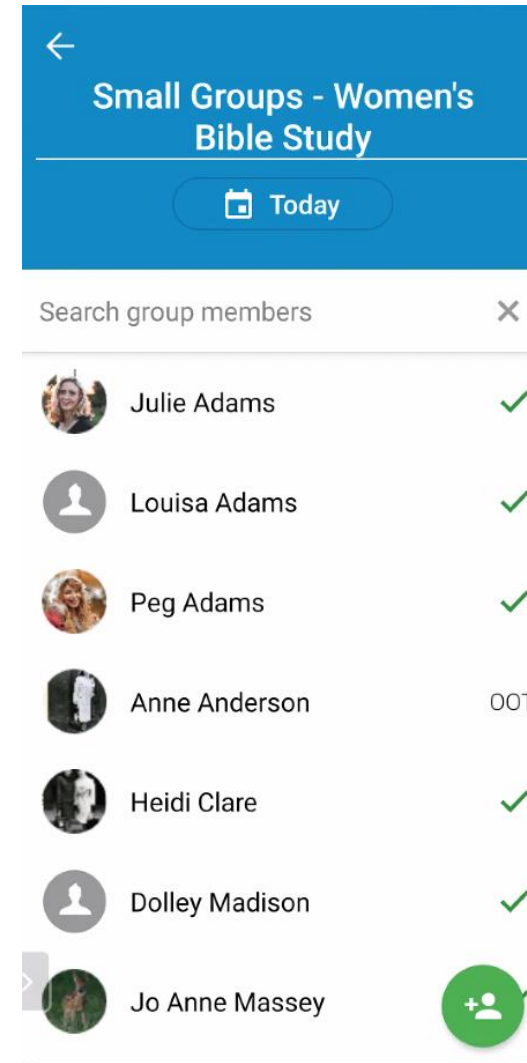
Calendar

- Tap on the event to see details
- Use the Fields drop down menu to add more details



Take Attendance on your phone or tablet!

- Click the Attendance Icon on the home menu.
- Choose your Group. Permissions will determine which groups are visible.
- Tap for those who are present.
- Show why someone is absent (out of town (OOT, SICK...))
- When attendance is saved in the app it's done!
- New Individuals can be added based on permissions.



Mass Contact

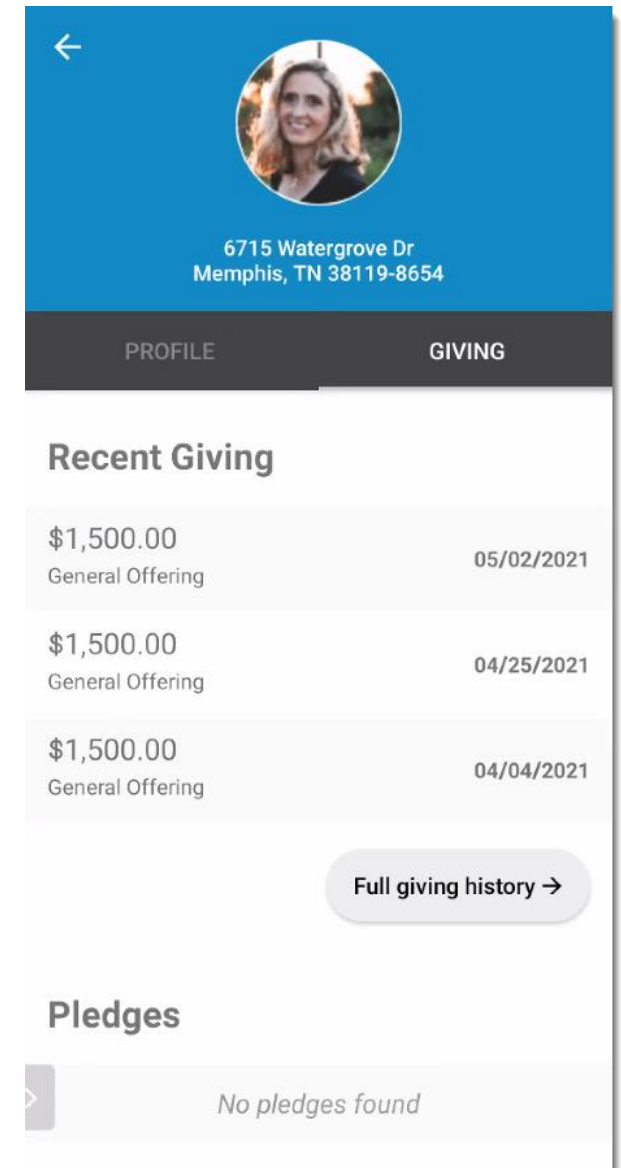
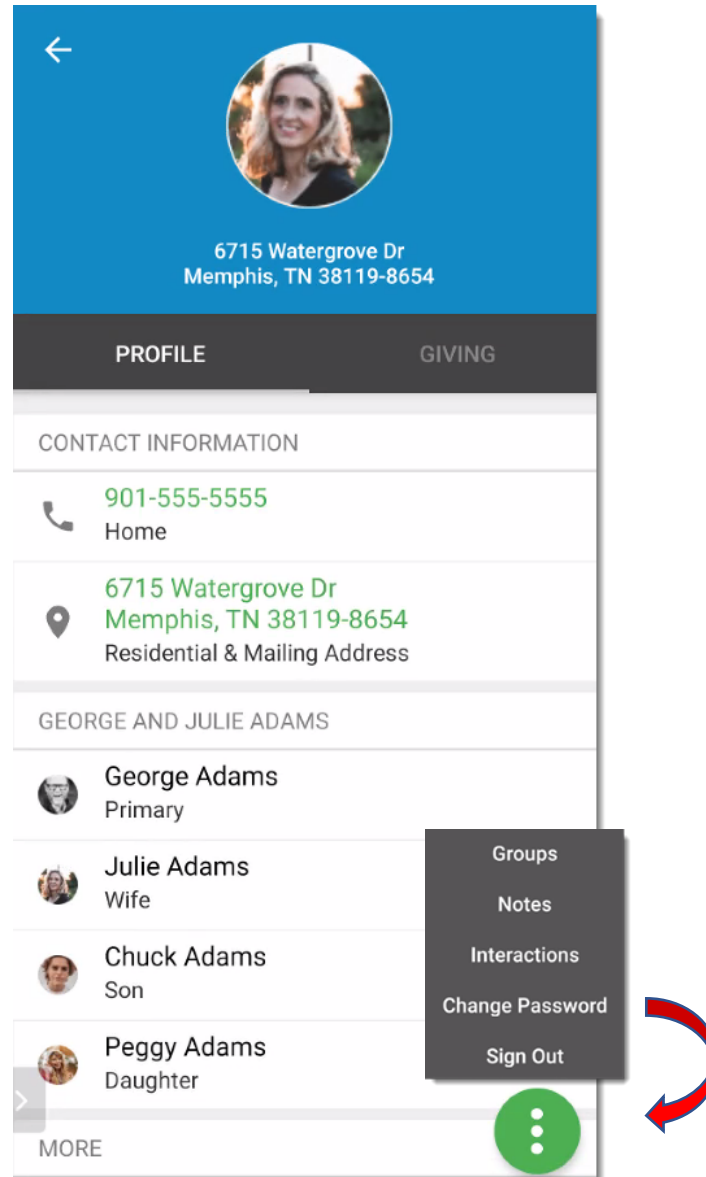
- Send Email, Text, or a voice message to everyone in a group.
- If needed, log as an Interaction.

The screenshot shows a mobile application interface for sending a mass contact. At the top, there is a blue header with a back arrow, the title "Mass Contact", and a "SEND" button. Below the header are three tabs: "EMAIL" (which is selected and highlighted), "SMS", and "VOICE". The main content area is divided into sections by horizontal lines:

- GROUP:** CMFINANC - Finance Committee
- SUBJECT:** Finance Committee meeting May 25th 7 pm
- BODY:** We'll meet in room 104 next Tuesday at 7pm. Jane will go over with us the proposed budget changes for 2021/2022. She sent an email to each of you with the proposed budget to review by net meeting. Thank you for your service !
- LOG AS:** Don't log ...

My Profile

- Users can tap on My profile to view their information, change password, and sign out. Other options are determined by permissions.
- Users can also see their own recent and full giving history along with pledges they may have.
- Users can tap on theirs or family members names to edit information, if permissions allow.

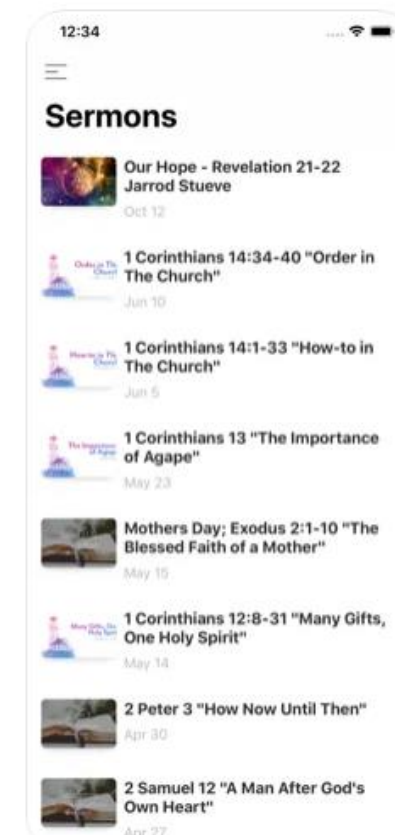
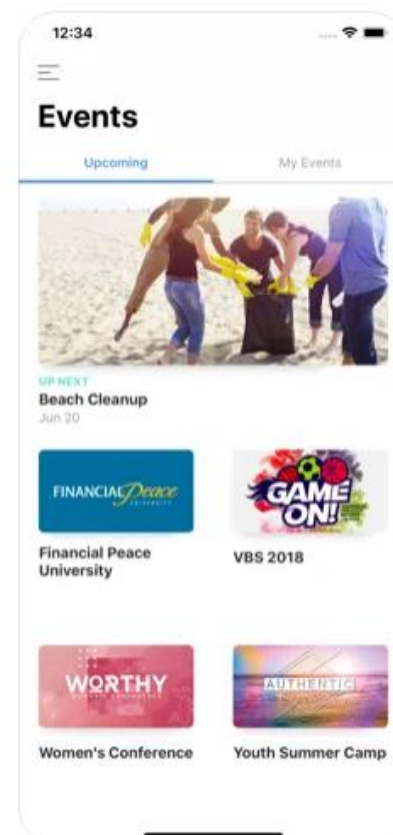
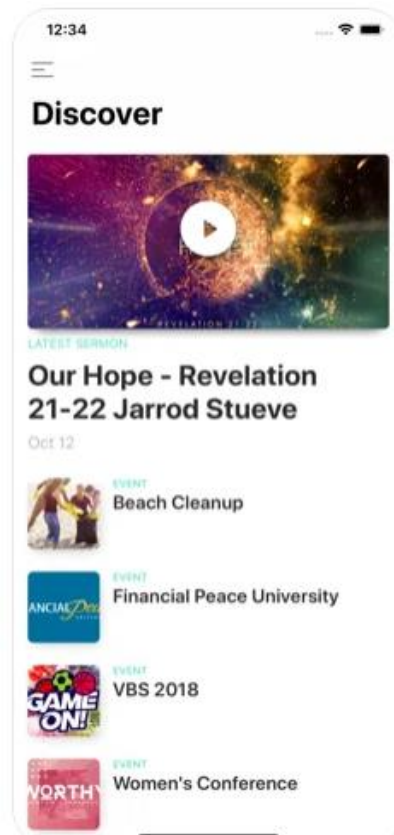


Review of ShelbyNext Membership App

- Primarily for Staff and Key volunteers
- Look up Individual's information to call, text, email, map directions...
- Log or Assign Interactions with staff or volunteers and members
- View Calendar events to get the details of when and where
- Take Attendance for classes, small groups, meetings
- Send Mass Emails or Texts to a group
- User can edit their own information and see giving history

MinistryOne: Your Member-facing App

- Regular M1 - Free to any ChMS or Giving customer
- Custom Branded option available for additional fee



Container App vs Custom Branded App

- Regular M1 is a container app
 - A container app is a single app that can be individualized by the user for their particular use.
 - "Church by MinistryOne"
 - Free to any Giving customer
- Custom branded M1 option is a standalone app
 - Create your own app icon to match your church's brand
 - Customize the app name
 - Add your image to show up while the app is loading
 - Direct people to your page in the app store
 - \$120 per month, \$1800 setup fee



Church by MinistryOne 4+

Access Your Church Anytime

Ministry Brands

Designed for iPhone

★★★★★ 4.1 • 30 Ratings

Free



Magnolia Church 4+

Magnolia Avenue Baptist Church

Designed for iPhone

★★★★★ 5.0 • 2 Ratings

Free

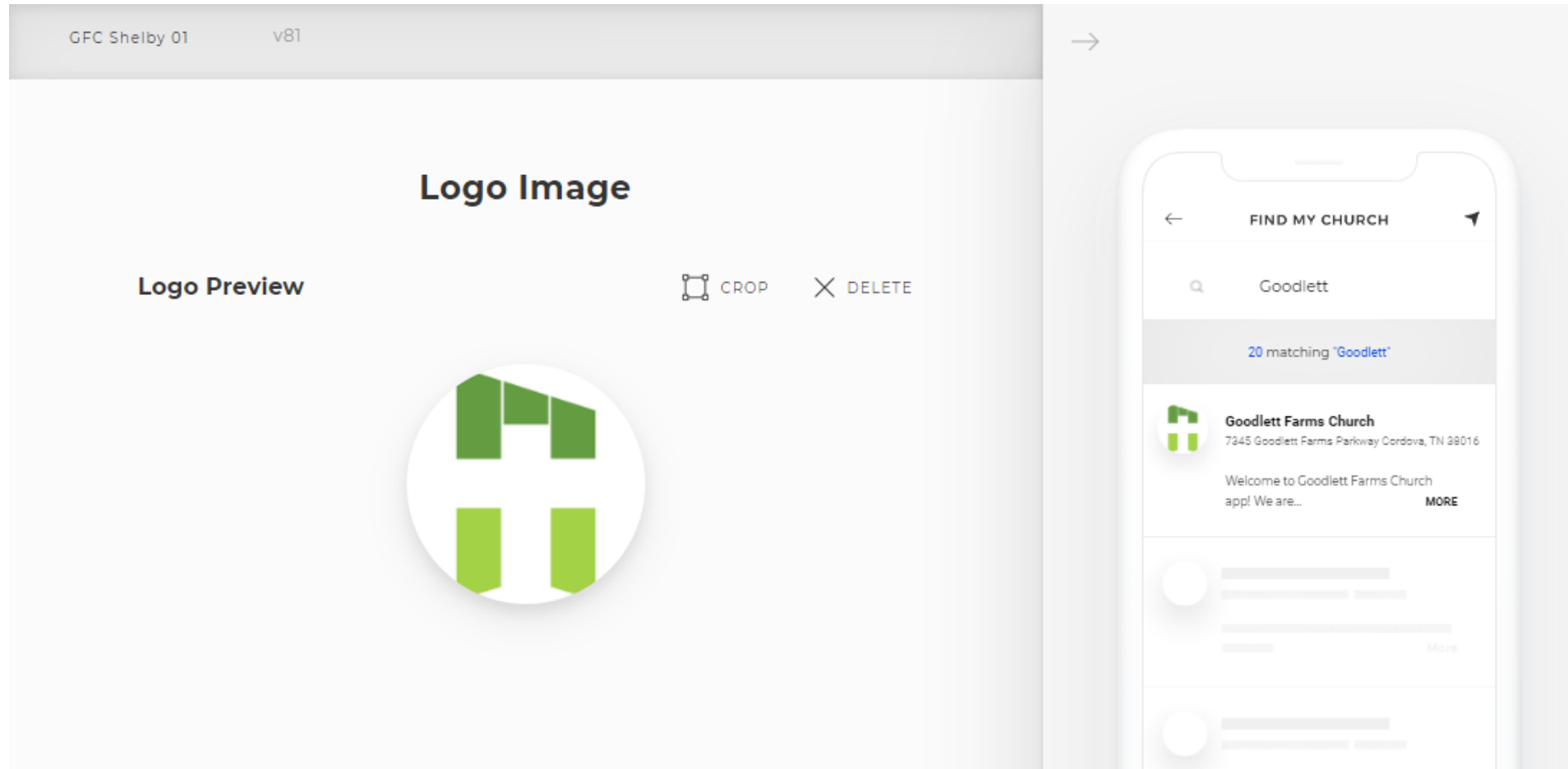
Same Admin Console for all M1

- Design Customization, no code required
- Integrations – ChMS, Giving, Streaming
- Push notifications
- Giving
- Sermons
- Event Registration
- Calendar
- Contact
- Prayer
- Check In
- Directory
- Analytics
- Promotional tools

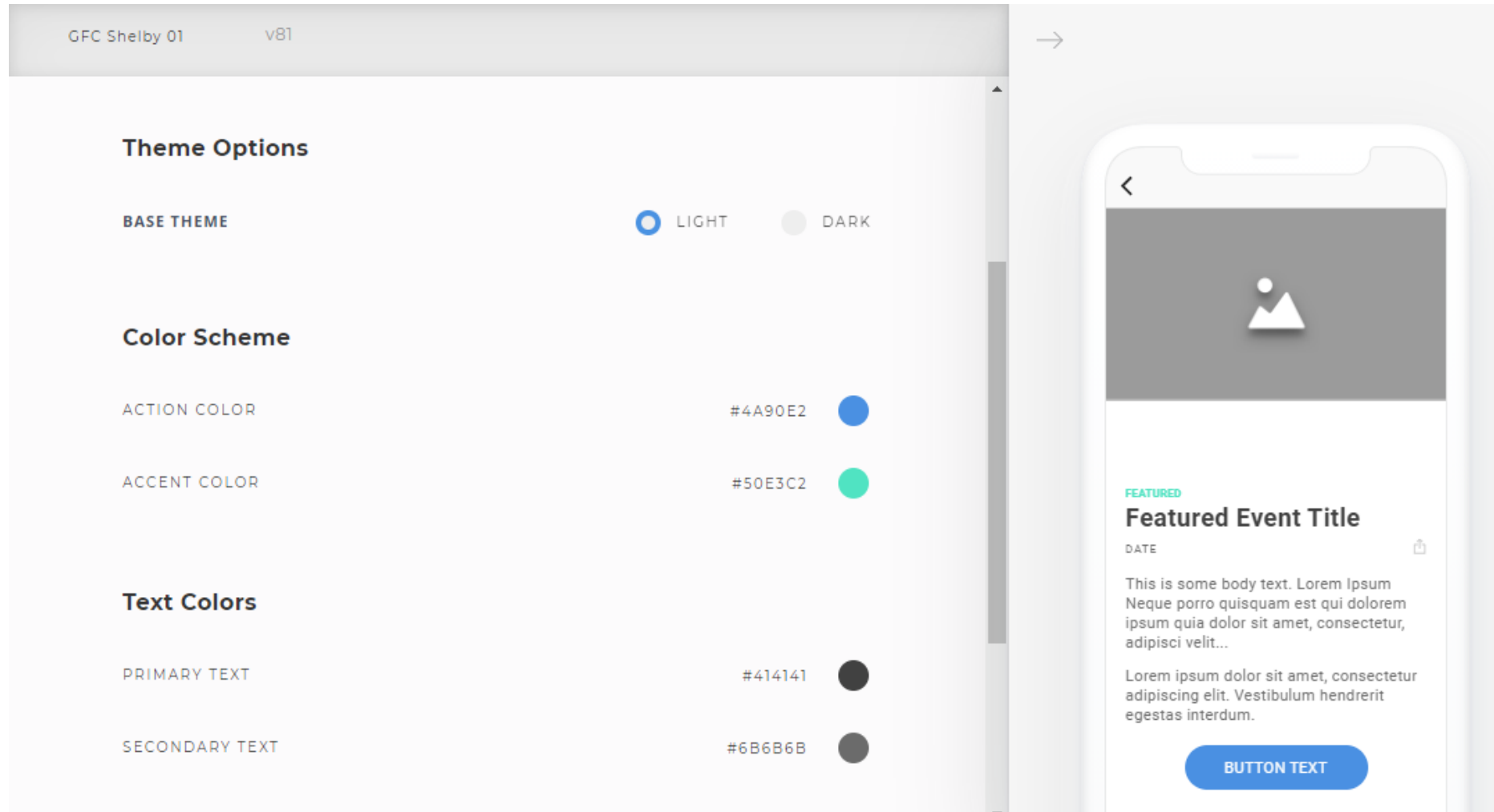


A screenshot of the MinistryOne Admin Console. The interface is split into three main sections. On the left is a dark sidebar menu with options: App Settings (expanded), General Info, Logo, Integrations, Modules, Design, Status, and a COLLAPSE button. The middle section is titled "General Info" and contains a form for editing church information. It includes a "MINISTRY NAME" field with the value "Goodlett Farms Church" and a "DESCRIPTION" field with the text "Welcome to Goodlett Farms Church app! We are happy to have you join us and hope you find this information useful. Have a blessed day!". On the right is a mobile app preview window showing a search interface for "Goodlett" with a list of results, including "Goodlett Farms Church".

Church Logo




Color Schemes to Match Your Branding



Menu Style/Naming Conventions/Order

GFC Shelby 01 vB1

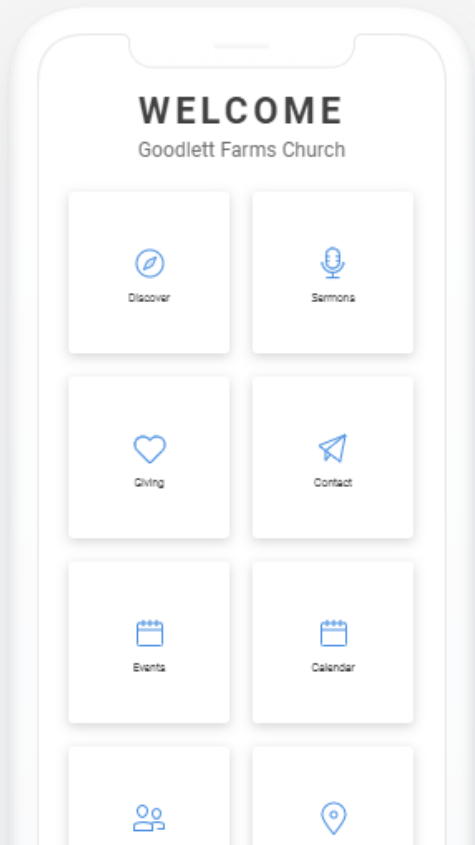
Choose A Menu Style



Bottom Slide Out Tiled

Sort Menu Items

Discover	⋮
Sermons	⋮



WELCOME
Goodlett Farms Church

- Discover
- Sermons
- Giving
- Contact
- Events
- Calendar

Integrations

GFC Shelby 01

v81

Enable ChMS Integration

Configure whether or not you'd like to utilize certain functionalities (such as check-in) from your connected ChMS.

CHMS INTEGRATION



CHURCHSTREAMING TV

Connect Your ChurchStreaming.TV Account

Find your church by entering your ChurchStreaming.TV username or email.

SEARCH

Enable Modules

MINISTRYONE

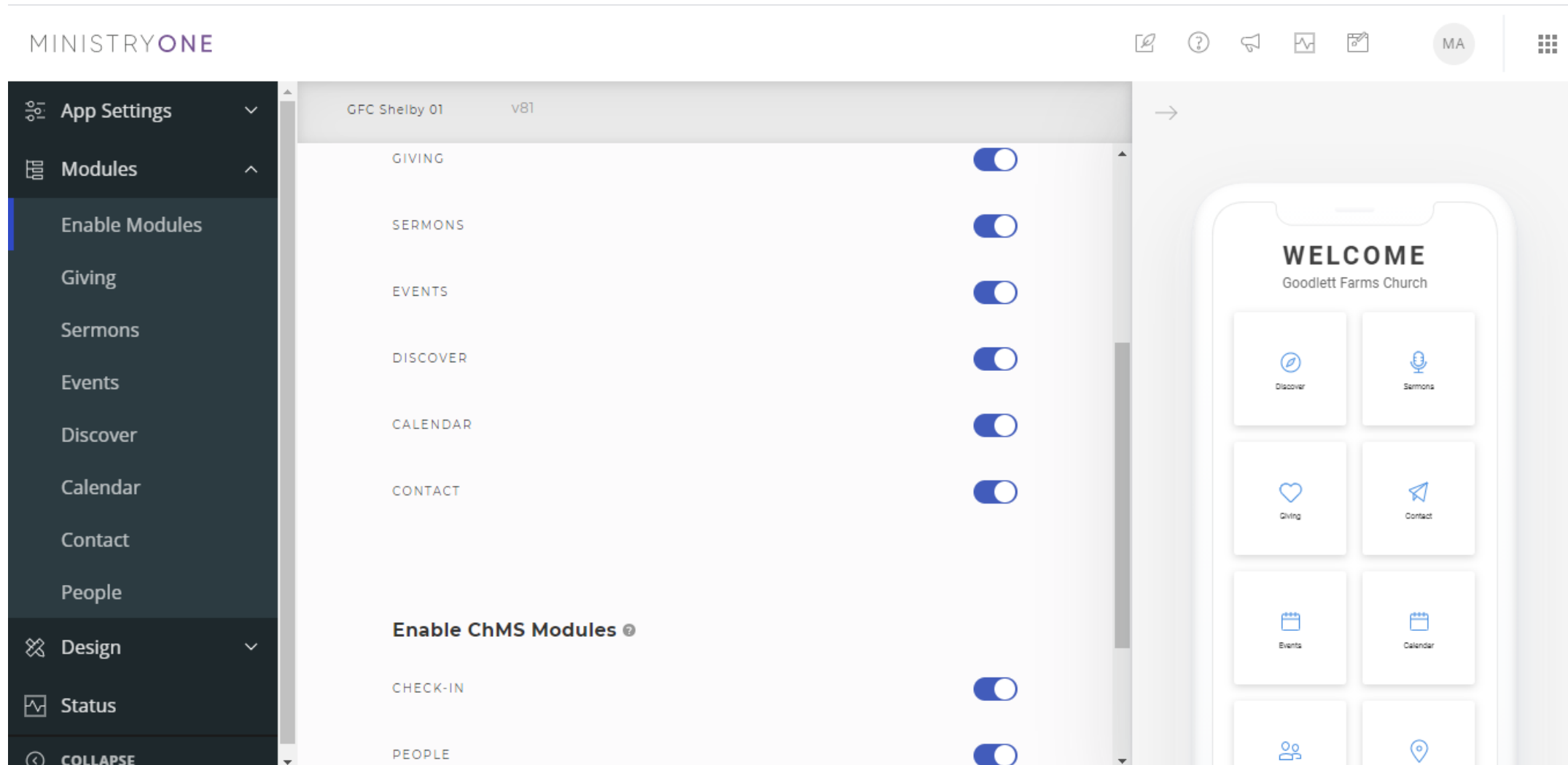
GFC Shelby 01 v81

GIVING	<input checked="" type="checkbox"/>
SERMONS	<input checked="" type="checkbox"/>
EVENTS	<input checked="" type="checkbox"/>
DISCOVER	<input checked="" type="checkbox"/>
CALENDAR	<input checked="" type="checkbox"/>
CONTACT	<input checked="" type="checkbox"/>
Enable ChMS Modules ?	
CHECK-IN	<input checked="" type="checkbox"/>
PEOPLE	<input checked="" type="checkbox"/>


WELCOME
Goodlett Farms Church

- Discover
- Sermons
- Giving
- Contact
- Events
- Calendar


COLLAPSE



Giving

GFC Shelby 01 v81 

Configure

NAME IN MENU Giving 

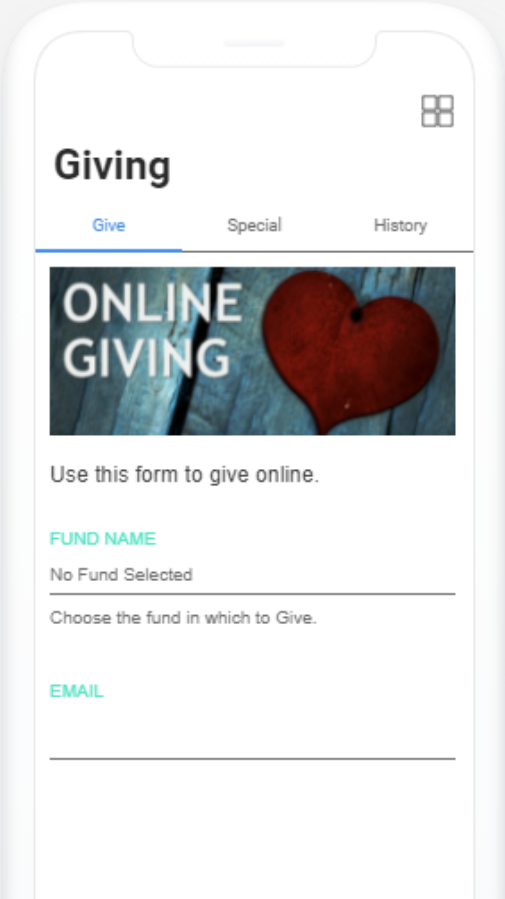
GIVING FORM

SHOW SPECIAL DONATIONS TAB

GIVING TAB

HISTORY TAB

SPECIAL DONATIONS TAB



→

Sermons/Media

GFC Shelby 01 v81

Configure

NAME IN MENU Sermons Ed...

Import from CloverSites Account

USERNAME

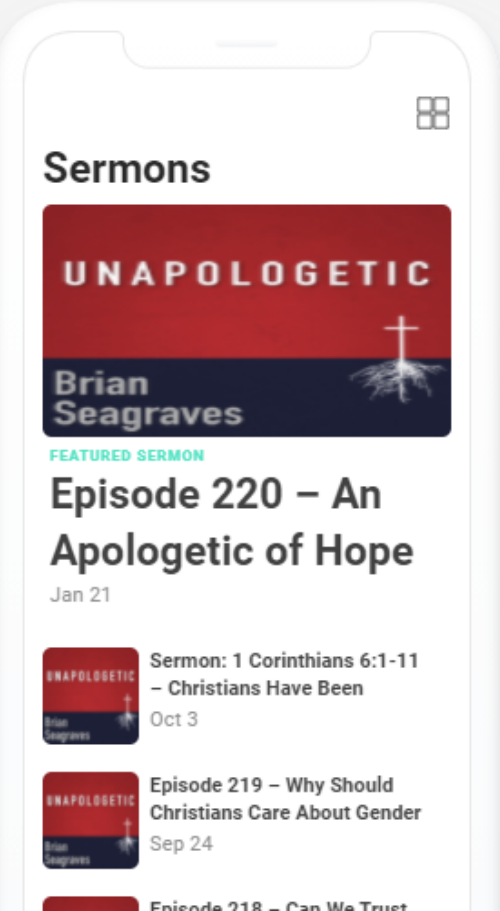
test@ministrybrands.com

PASSWORD

.....

CONNECT

→



Sermons

UNAPOLOGETIC

Brian Seagraves

FEATURED SERMON

Episode 220 – An Apologetic of Hope

Jan 21

Sermon: 1 Corinthians 6:1-11 – Christians Have Been

Oct 3


Episode 219 – Why Should Christians Care About Gender


Sep 24


Episode 218 – Can We Trust

Sermons/Media

GFC Shelby 01 v81

✓  PODCAST **DISCONNECT**

 YOUTUBE **CONNECT**

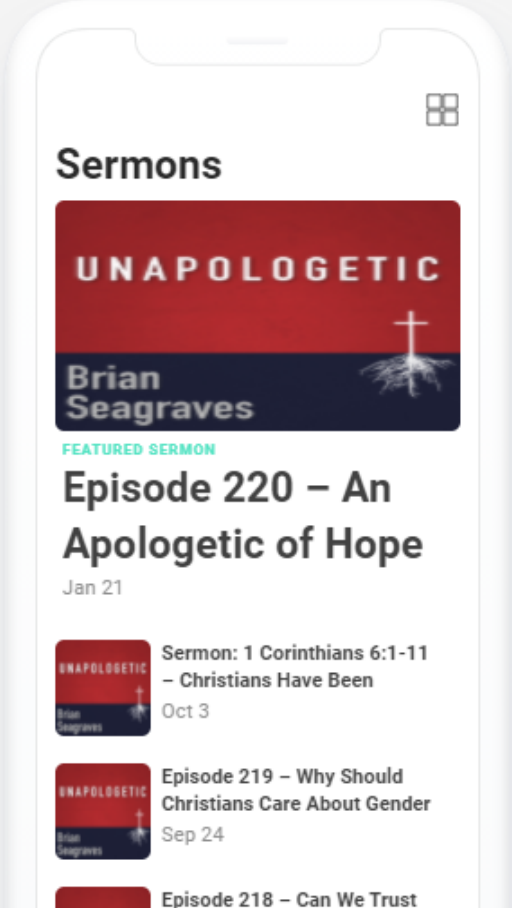
 VIMEO **CONNECT**

Choose How Your Sermons Display

FEATURED SERMON

DISPLAY PREFERENCE: Auto Update With Latest Sermon

- Auto Update With Latest Sermon ✓
- Episode 220 – An Apologetic of Hope
- Sermon: 1 Corinthians 6:1-11 –



Sermons


UNAPOLOGETIC


Brian Seagraves


FEATURED SERMON

Episode 220 – An Apologetic of Hope

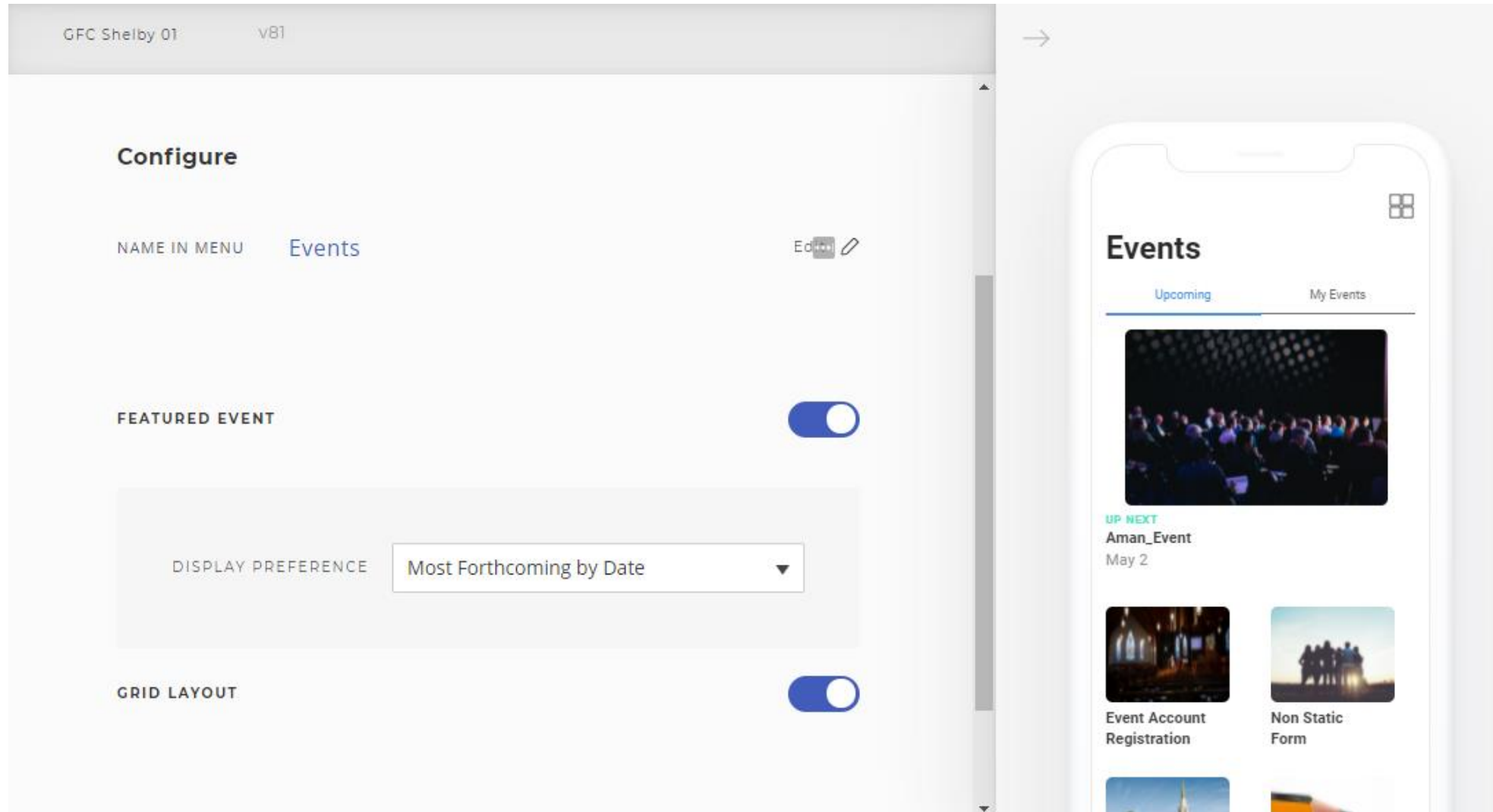
Jan 21

 Sermon: 1 Corinthians 6:1-11 – Christians Have Been
Oct 3

 Episode 219 – Why Should Christians Care About Gender
Sep 24

 Episode 218 – Can We Trust


Event Registration




Discover

GFC Shelby 01 v81

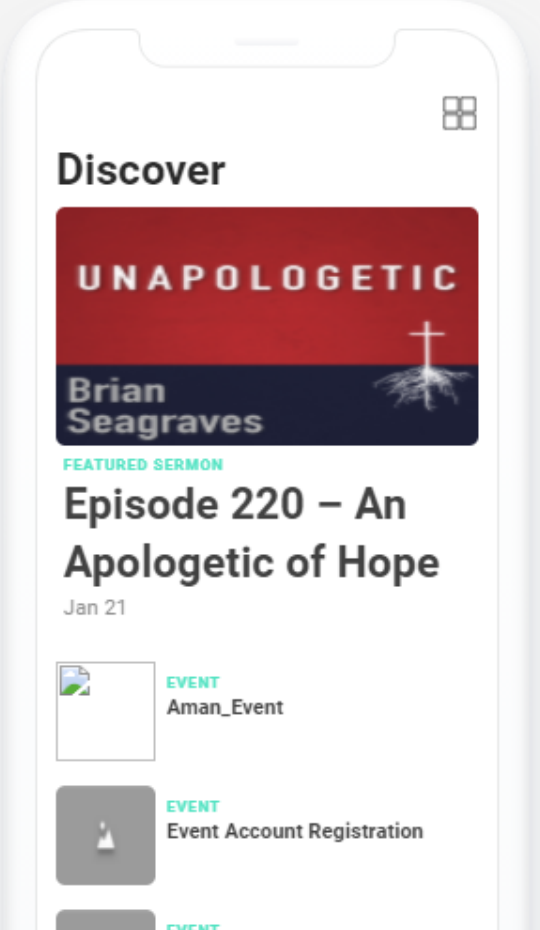
Configure

NAME IN MENU Discover Edit 

FEATURED SERMON

DISPLAY PREFERENCE Auto Update With Latest Sermon 

EVENTS




The mobile app preview shows a 'Discover' menu item. Below the title is a featured sermon card with a red and dark blue background. The card text reads 'UNAPOLOGETIC' in white on the red background, and 'Brian Seagraves' in white on the dark blue background. Below the name, it says 'FEATURED SERMON' in small green text, followed by 'Episode 220 – An Apologetic of Hope' in large black text, and 'Jan 21' in smaller black text. Below the sermon card is a list of events. The first event is 'Aman_Event' with a small image icon. The second event is 'Event Account Registration' with a small icon of a person at a computer. A third event is partially visible at the bottom.

Calendar

GFC Shelby 01

v81

NAME IN MENU Calendar

Edit 

CONNECT YOUR CHMS CALENDAR 

CALENDAR FEED FROM CHMS INTEGRATION



CALENDAR VIEW

Public View



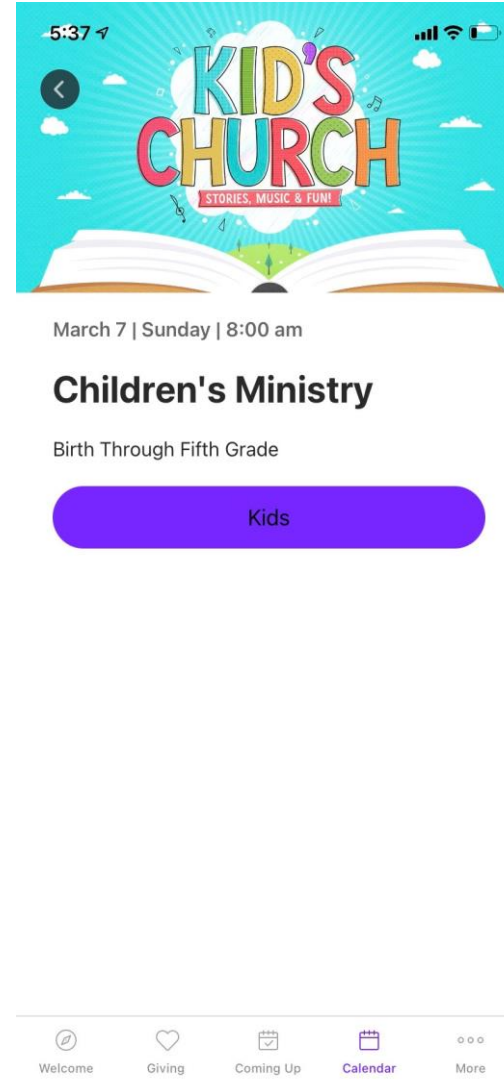
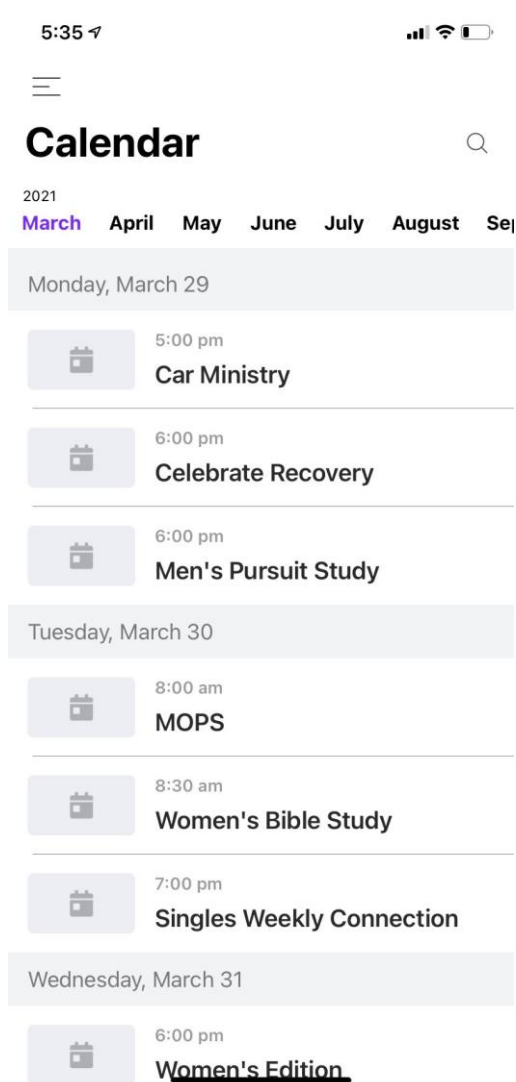
CONNECT OTHER CALENDAR

ICAL EMBED LINK

Paste your iCal feed embed link here

CONNECT


Calendar




Contact

GFC Shelby 01 v81

Configure

NAME IN MENU **Contact** Edit 

CONTACT FORM

Non Static Form 

CONTACT TAB TITLE

Contact

→

Contact

Contact Prayer

Non Static Form

New : This is a description that I would like to see. Please make sure it displays correctly on the MinistryOne app.

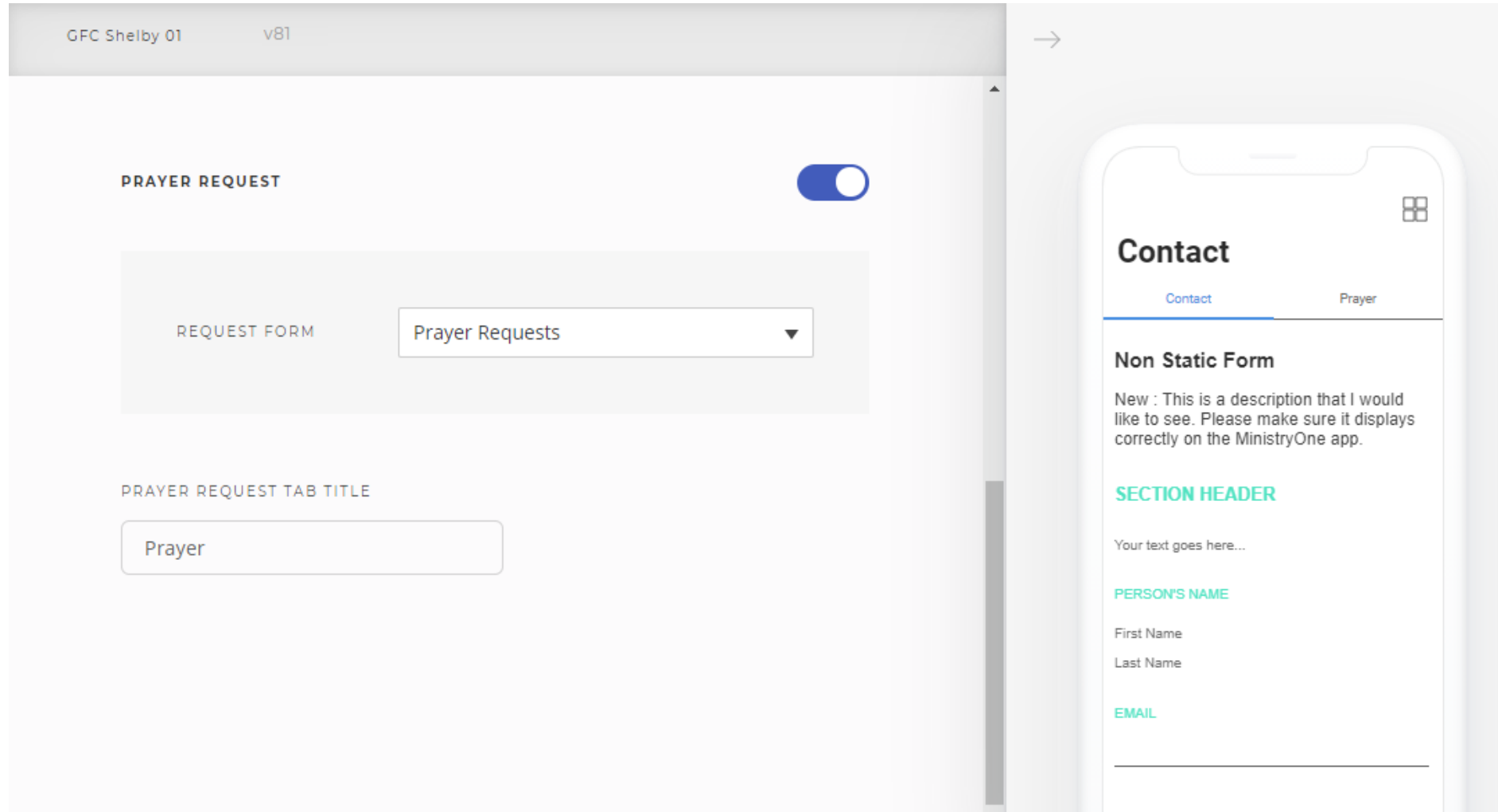
SECTION HEADER

Your text goes here...

PERSON'S NAME

First Name
Last Name

Prayer/Special Form



People - Groups/Directory

The image shows the configuration interface for the 'People' section in a mobile application. The interface is split into two parts: a settings panel on the left and a mobile app preview on the right.

Settings Panel:

- NAME IN MENU: People (with an Edit icon)
- GROUPS: Enabled (toggle switch)
- GROUPS TAB TITLE: My Groups (input field)
- ENABLE GROUP FINDER: Enabled (toggle switch). Note: The group finder will use the settings you have configured in your ChMS.
- DIRECTORY: Enabled (toggle switch)
- DIRECTORY TAB TITLE: Directory (input field)

Mobile App Preview:

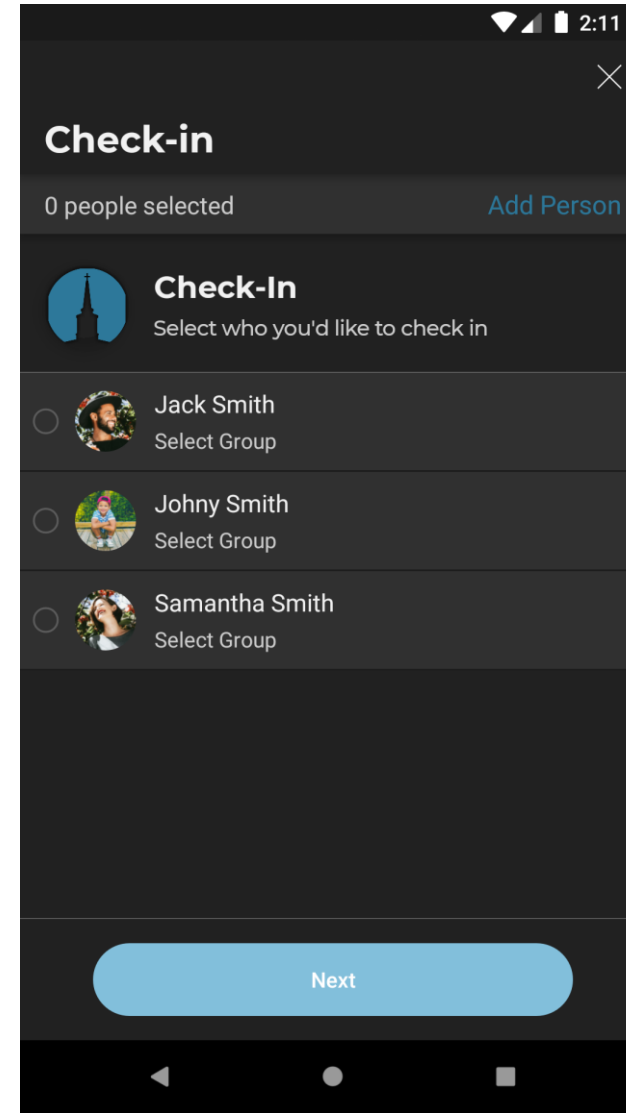
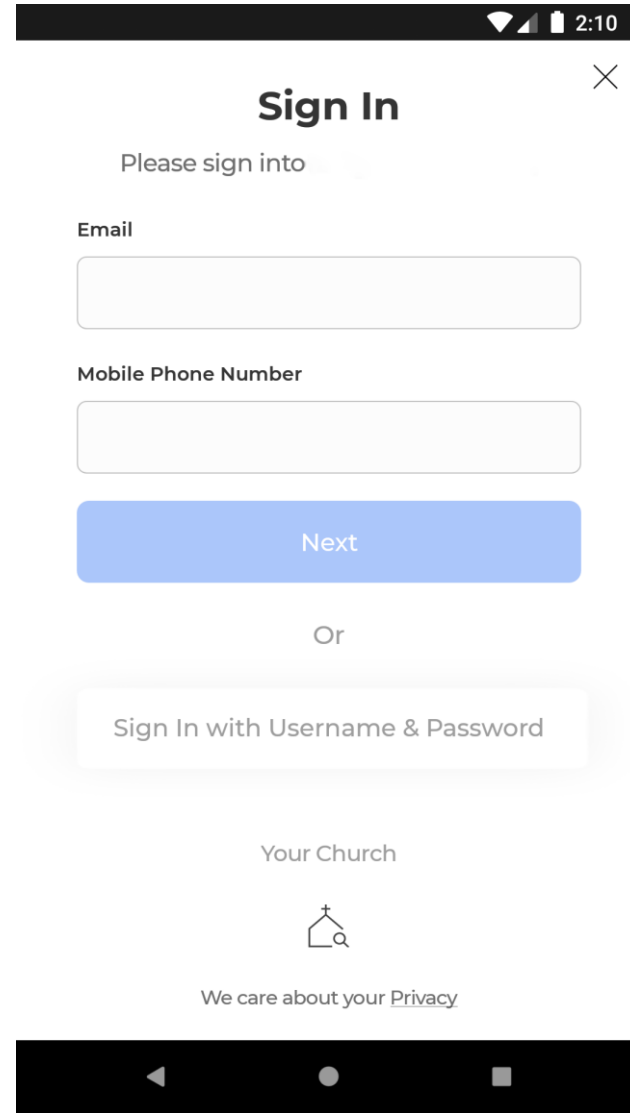
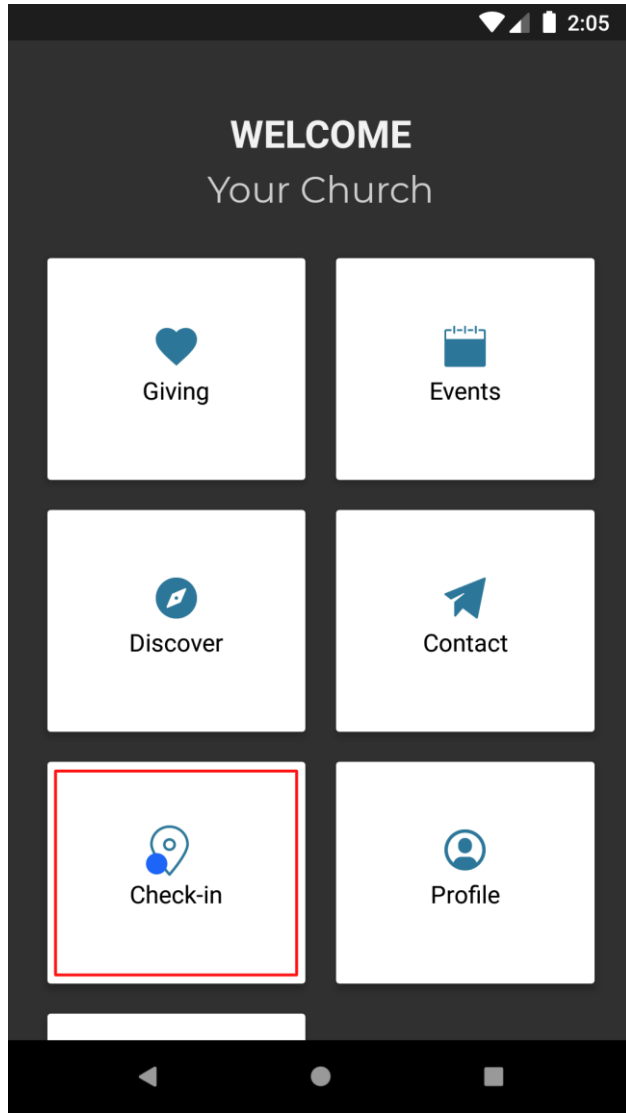
- Section: People
- Sub-sections: My Groups, Directory
- Summary: 3 Groups, Join a Group
- Group 1: Santa Ana Small Group, Leaders: Mike Lee, 13 Members
- Group 2: Soccer League, Leaders: Tom Grayson, 23 Members
- Group 3: Wednesday Morning Men's Study, Leaders: Mark Rodriguez, Jason Lipton, 93 Members

Check In

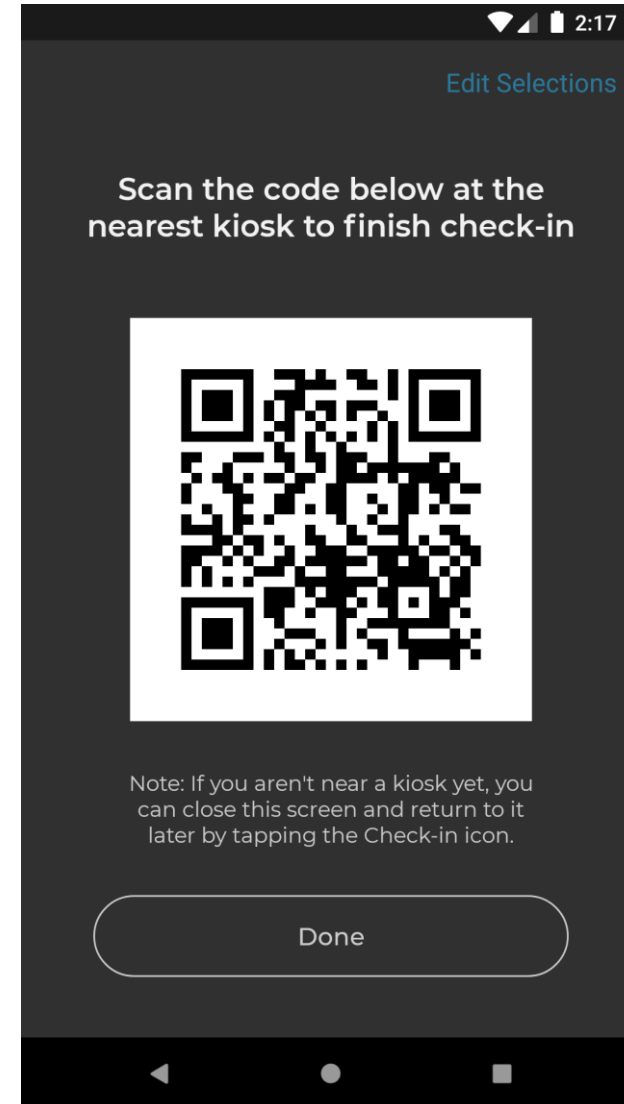
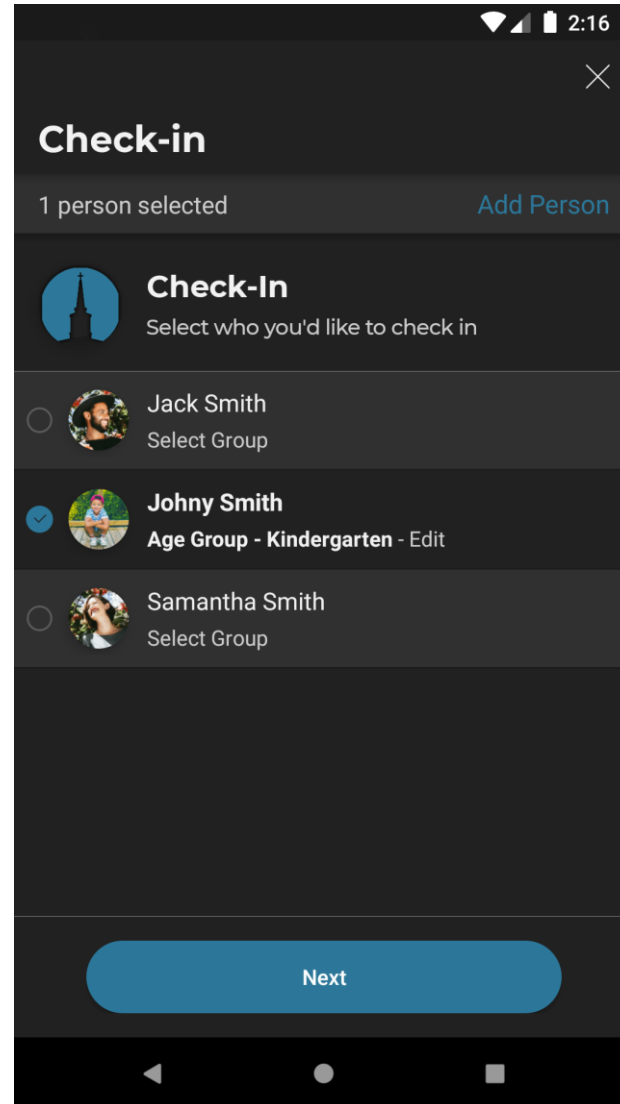
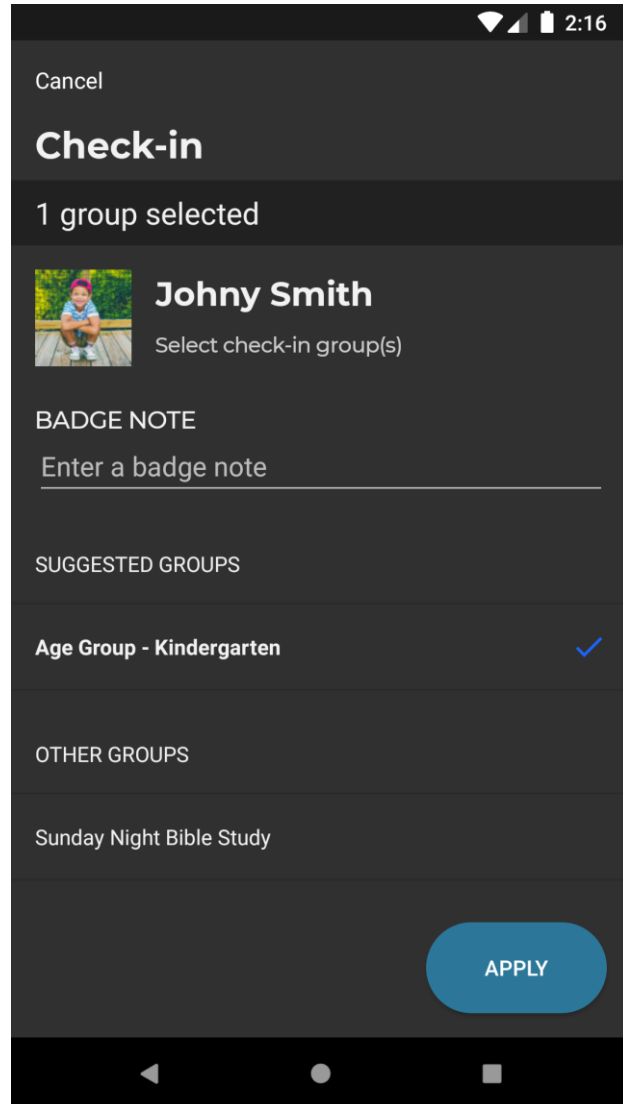
- How it works
 - Parents can use the app to check in their children on their way to church, and then it's just a quick scan to print their badges at a kiosk when they arrive.
- Self Check-In is time-sensitive. Members may not start check-in from outside the church until a regular check-in has happened from a station in the building. As soon as the first check-in happens, self check-in from MinistryOne opens up and closes automatically **1 Hour** after the last check-in has taken place.

<https://documentation.learnchms.com/external/article/1629?l=>

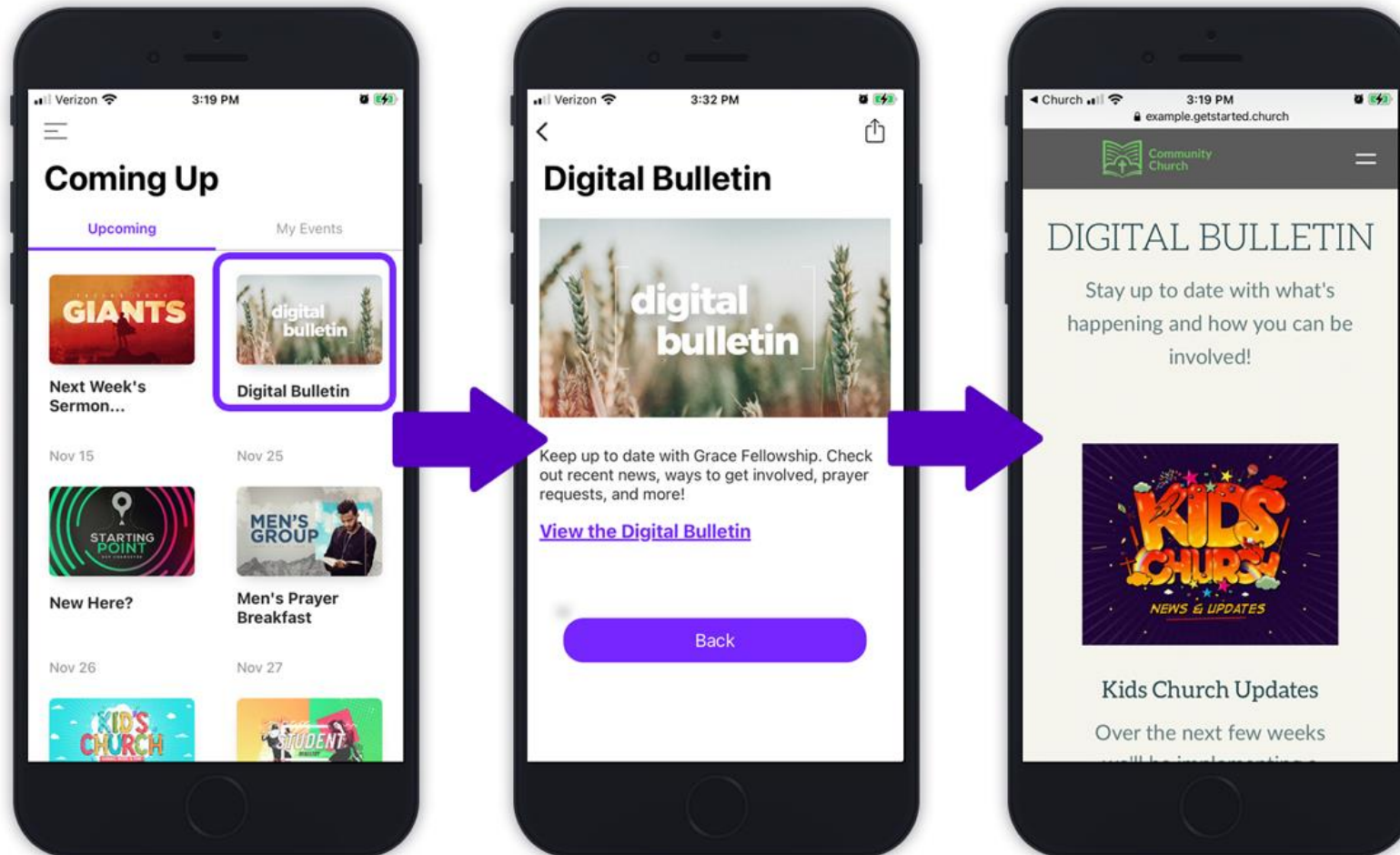
Check In



Check In



Link to Web Pages



Push Notifications

MINISTRYONE



Messages

Messages

Scheduled

History

+ NEW MESSAGE

TITLE

DATE

TIME

ACTION

There are no messages to display.

Push Notifications

NEW MESSAGE ALL FIELDS REQUIRED

TITLE 0/100

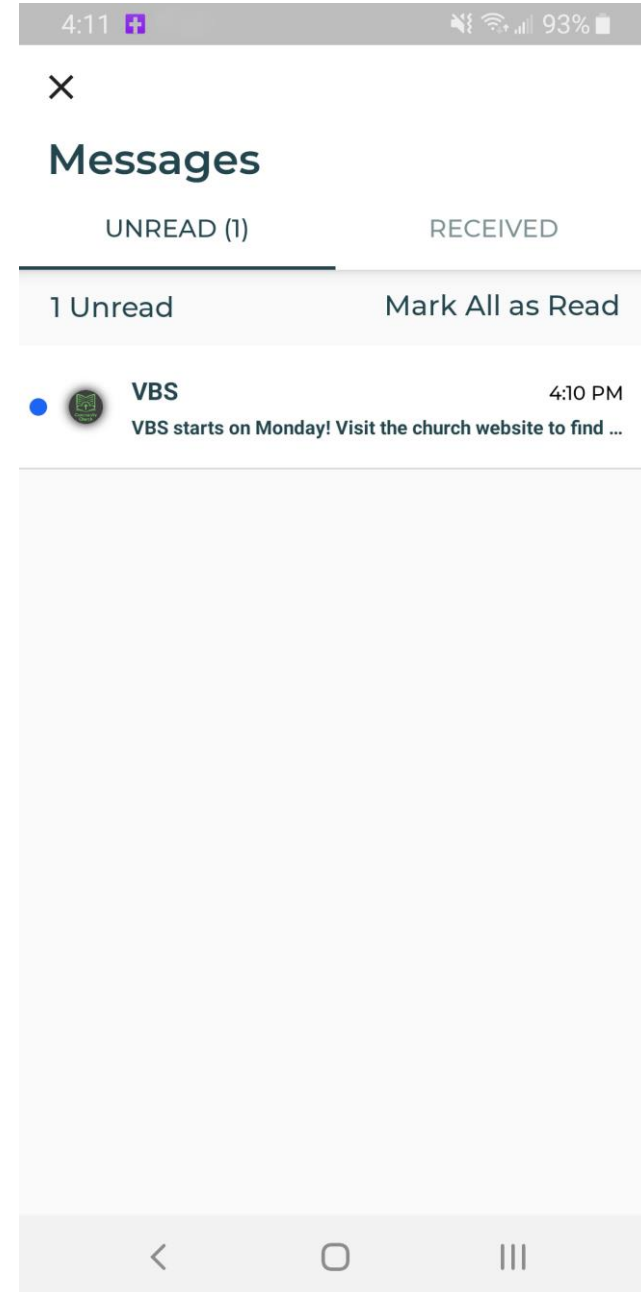
MESSAGE 0/240

DELIVERY OPTIONS

SEND RIGHT AWAY

SCHEDULE FOR LATER

SEND NOW

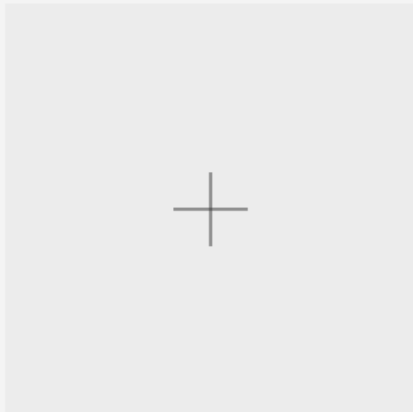


Projects

MINISTRYONE




PROJECTS






MAY 17, 2021

GFC Shelby 01

 **LIVE**
Unpublished Changes

MODIFIED: APR 30, 2021

LiveStreamTest



JAN 13, 2021

LiveStreamTest

Publish Your App!

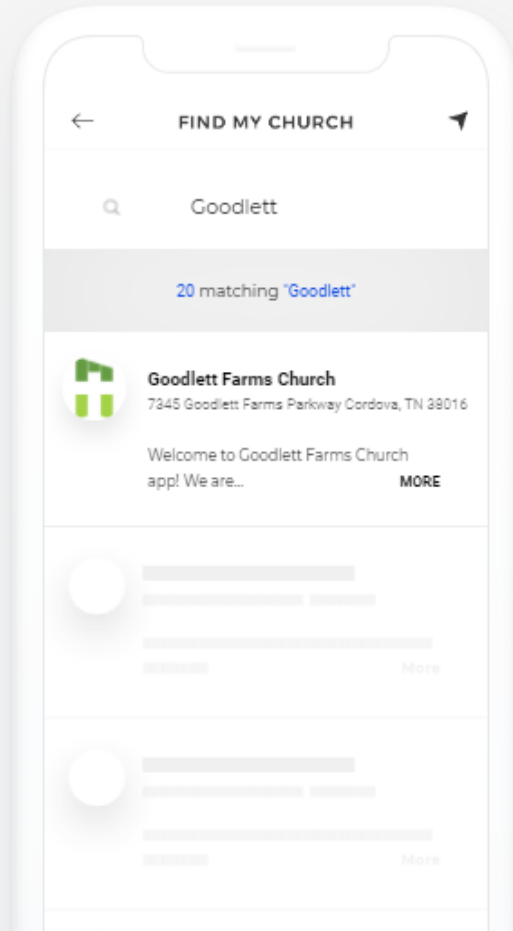
GFC Shelby 01

v81

Great Job!

See, your hard work really does payoff!
Your app is ready to publish.

PUBLISH



Analytics

MINISTRYONE



Analytics

Custom ▼ 11/01/2020 — 05/17/2021 Timezone: CDT

App Installs

113 ↑

Up 74% since Apr 17, 2020

Active Users

133 ↑


Up 111 since Apr 17, 2020

Sessions

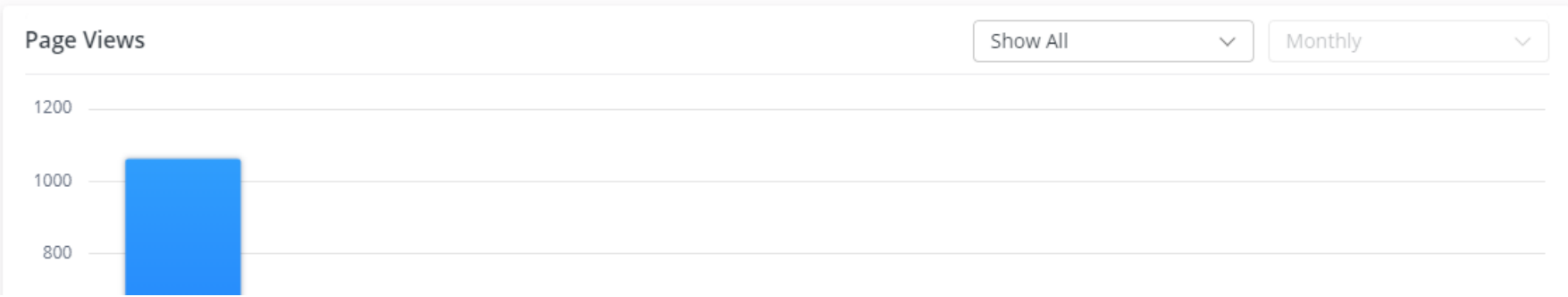
615 ↑

Up 547 since Apr 17, 2020

Weekly Check-ins From App



No Data to Display



How Do Members Find Us?

- Regular M1
 - Search for "MinistryOne" in the app store and find church by typing name/zip code or geolocation
 - Share your landing page to directly link to your church within M1
 - <https://app.ministryone.com/landing/IE>
 - Use embed code to place Apple/Google buttons to directly link to your church within M1
- Custom Branded M1
 - Search for your church name in the app store
 - Landing page
 - Embed code with links

Promote The App On Your Website



Shelby Giving Demo

Stay Connected with Our App

Register for events, see what's going on at your church, contact us and more all with the convenience of your phone.

MinistryOne™



Promotional Tools

• Additional Resources

- Download helpful promotional & onboarding resources such as PowerPoint slides, bulletin inserts, and social media graphics.
- <https://documentation.learnchms.com/external/article/1501?l=50>

Launch Toolset

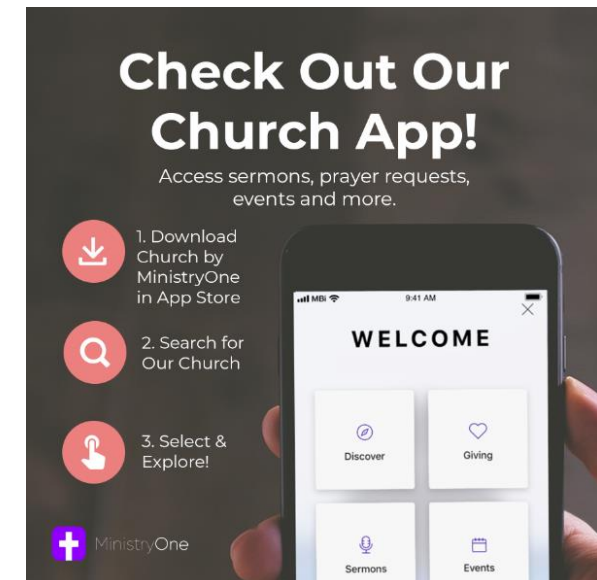
Gain a running start to launching your new App through the resources linked below. Each zip file has ready-to-go PDFs or the original template you can customize further to add your own unique flair. Use the overview guide linked above paired with these resources to create a plan and increase your church engagement.

[Social Media Image](#)

[Bulletin Insert](#)

[PowerPoint - Wide Screen](#)

[PowerPoint - Standard Screen](#)



Help

The screenshot shows the MinistryOne app settings interface. A 'Help & Support' modal is displayed in the foreground. The modal includes a search bar, sections for 'Help For This Page', 'Top Categories', and 'Support Info', and a 'View All' button. A yellow circle highlights a question mark icon in the top right corner of the app interface.

Help & Support

Search...

Help For This Page
Getting Started: Written Help
Getting Started with MinistryOne

Top Categories
(1) Getting Started
(2) Video Help
Design
Giving

Support Info
(888) 697-4352
support@shelbyinc.com

[View All](#) [Email](#)

Last Release: March 25, 2021 ([Release Notes](#))

Where can I watch this video again?

**Watch or Register to attend
Webinars**

@ Community.Shelbysystems.com

Next in the series...

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

Wednesday, June 23 at 2:00 pm (Central)

Title	Date	
Reconciling Online Giving, From Entry to Bank Reconciliation	03/24/2021 2:00 PM (Central Time)	Register NOW

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

New Virtual Workshops are here!

- Enrollment now open for June and July!
- 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 learn more and register:

<https://www.shelbysystems.com/learn/training/shelby-virtual-training-workshops>

MPower University – Learn at your own pace!

- Includes an Online guided video
- Detailed handouts for each course
- Quiz for each chapter
- Certificate when you successfully complete each chapter!



Click here to learn more and register:

[https://www.shelbysystems.com/learn/training/
mpower-university/](https://www.shelbysystems.com/learn/training/mpower-university/)

Join us for a new Giving Webinar...

Join us on May 26th at 12 pm CT for a live webinar as we discuss the best strategies for building a successful recurring gifts program.



Click here to Register

<https://hello.shelbysystems.com/giving-webinar>

One on One Training

- Personalized to your needs
- Use your data
- Train one person or a group at the same time



Training@shelbyinc.com

Note - 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.

Questions?