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Advance Your Knowledge
Webinar Series

Using Workflows
to Track Activity and Involvement

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

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What are Workflows

Workflows can help:

- get rid of repetitive work

- clean up old records

- track patterns of Giving

- monitor signs of need for benevolence

- track attendance for online church services

What they aren't

Workflows are not:

- going to completely automate all your new member workflow

- needed for online giving batching to Membership

- going prefill fields or preselect group memberships based on new or existing membership (check out Advanced Search and Query)

- a process flowchart builder for new member onboarding

Triggers

There are 8 triggers that alert a workflow to run.

Giving

- Amount
- New Regular Giver
- No Longer Giving
- Pledge Creation

Group

- Add/Remove
- Membership Duration

Miscellaneous

- Attendance
- Form Submission
- Date Fields

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Trigger Timeframes

Triggers and actions typically run around **every 15 minutes**, so be aware that triggers and actions do not occur instantaneously. However, ChMS monitors your account so that triggers and actions are executed correctly and in a timely fashion.

- **Attendance triggers** → will run **once a week** if they are set for **more than 6 days**. Attendance workflows that are set for **6 days or less run daily**. The <u>time</u> they run/fire is based on <u>when</u> the workflow was created. You can '*reset*' the clock on this by manually running the trigger which will update the timestamp and the workflow will continue to run based on that date until it is manually run again.
   Example: If you create a workflow on Monday at 10:00 am for attendance (trigger) that adds a person to a group (action), then the following Monday about 10:00 am, the attendance trigger will run and put any members with that attendance into the group.

- **Added to a Group** → about 15 minutes. The **Add to Group** workflow triggers <u>once per day</u>.

- **Form Submission** → continuous

- **Giving and Pledge Creation** → continuous

- **Membership Duration** → continuous

Actions

There 9 actions that can be used to provide a reaction to the triggers.

Mass Contacts

- Email
- SMS (text)*

Groups

- Group (Add/Remove)
- Present in Group

Miscellaneous

- Interaction
- Admin Message
- Update Progress
- Constant Contact*
- Mailchimp*
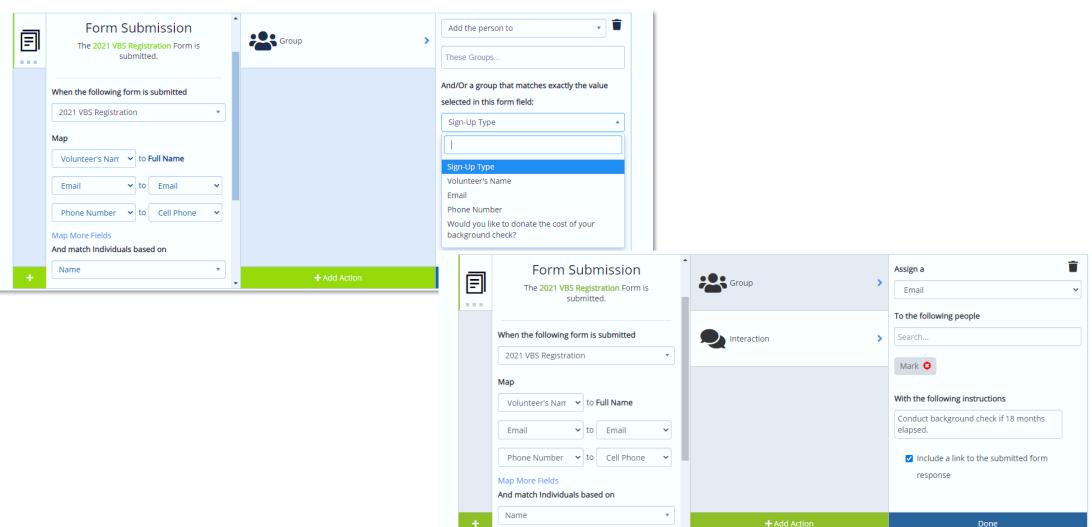
*(only if integrated/activated)

Forms Submission

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Forms Submission Workflow

Form Submission

The **2021 VBS Registration** Form is submitted.

When the following form is submitted

2021 VBS Registration

Map

Volunteer's Nam to **Full Name**

Email to Email

Phone Number to Cell Phone

Map More Fields

And match Individuals based on

Name

Group

+ Add Action

Add the person to

These Groups...

And/Or a group that matches exactly the value selected in this form field:

Sign-Up Type

|

Sign-Up Type
Volunteer's Name
Email
Phone Number
Would you like to donate the cost of your background check?

Form Submission

The **2021 VBS Registration** Form is submitted.

When the following form is submitted

2021 VBS Registration

Map

Volunteer's Nam to **Full Name**

Email to Email

Phone Number to Cell Phone

Map More Fields

And match Individuals based on

Name

Group

Interaction

+ Add Action

Assign a

Email

To the following people

Search...

Mark ⊕

With the following instructions

Conduct background check if 18 months elapsed.

☑ Include a link to the submitted form response

Done

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New Records and Visitor/Guest Follow up

Name

1st time Visitor

☑ Active

Description

1. Assign Interaction to Group leader to follow up with visitor.
2. Text visitor with a follow up message.

Last Ran: Today - 5:34 PM ● ● ●

**Group —
Add/Remove**

Individual is **added** to **1st Time
Visitor**

Match a Individual who is

Added to ▼

1st Time Visitor ✖

💬 Interaction >

📱 SMS >

SMS 🗑

☑ The person

☐ The person's parent

☐ The person's spouse

☐ The group leader

And the following

Numbers

Separate numbers with commas.

With the following message

Pastor Greg here! @NAME, We are
happy to see you attended our New

Use @NAME as a placeholder for the
person's name who triggered this action.

+ | **+ Add Action** | **Done**

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Clean Up Records

Clean Up Records

Name

Visitor Record Clean Up

☑ Active

Description

1st Trigger - Follow up on Record
2nd Trigger - Add Record to Potential Delete Group

Trigger 2

...

Group — Membership Duration

Individual has been in **1st Time Visitor** for **30 weeks**

Match a Individual who has been in

1st Time Visitor ✕

For

30 weeks

+

Group

+ Add Action

Add the person to ▼ 🗑

delete records ✕

Done

Save

By Date Field

By Date Field

From/in the following Groups
- a) At least one group is required
- b) Allow multi-select

Choose event
- a) Default is Birthday
- b) Date fields include:
  Birthday, Died Date, Baptism Date, Last Attended, Last Activity, Last Contributed, all configurable fields, "Last Background Check"

Treat this as an anniversary?
- a) Options are yes or no
- b) Behaves just like it does in Glance. So that birthdays, Wedding anniversaries, etc trigger year after year.
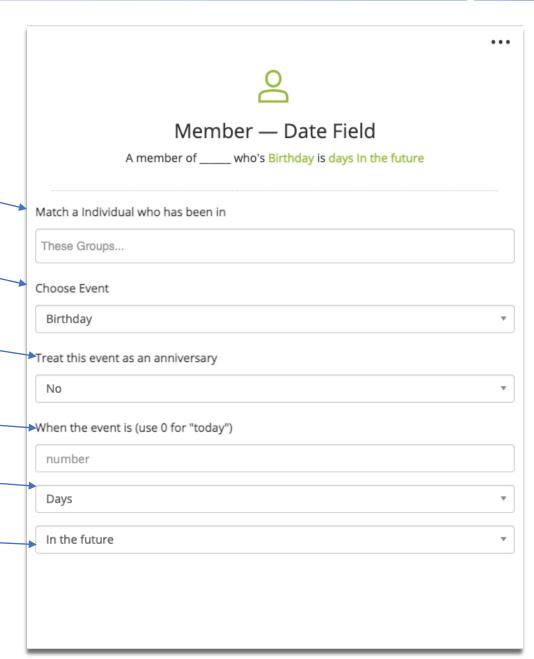- c) Default yes

When the event is + input
- a) This is where to input the # of days/weeks/months/years
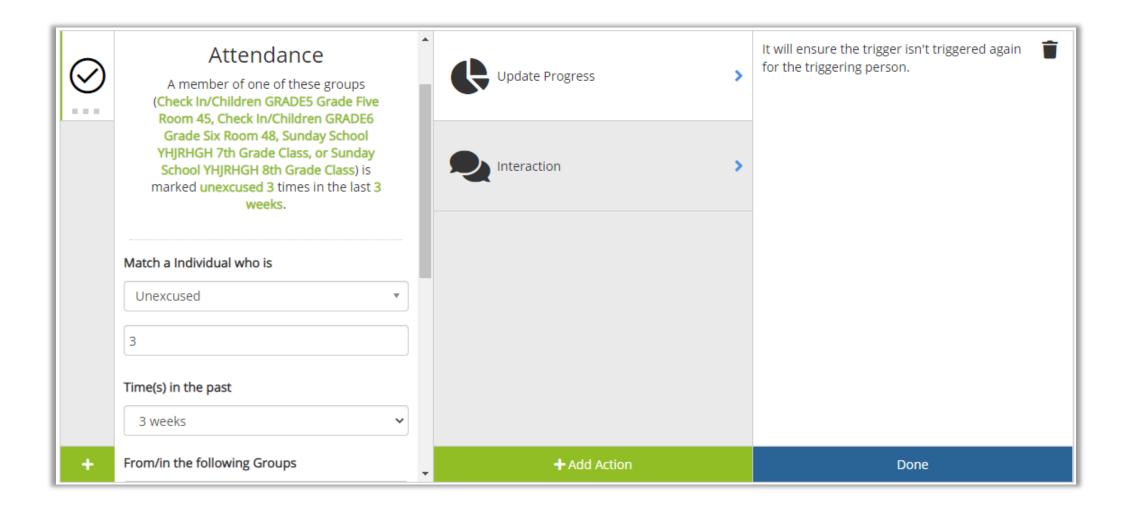- b) Req Field, default 0 == today

Timeframe selection
- a) Options are
  Days, Weeks, Months, Years
- b) Default is Days

Forward/backward selection
- a) Options Are
  In the past / In the future
- b) Default is in the past

Member — Date Field

A member of _____ who's Birthday is days In the future

Match a Individual who has been in

> These Groups...

Choose Event

> Birthday

Treat this event as an anniversary

> No

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

> number

> Days

> In the future

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Attendance

Attendance

A member of one of these groups (Check In/Children GRADE5 Grade Five Room 45, Check In/Children GRADE6 Grade Six Room 48, Sunday School YHJRHGH 7th Grade Class, or Sunday School YHJRHGH 8th Grade Class) is marked unexcused 3 times in the last 3 weeks.

Match a Individual who is

Unexcused ▼

3

Time(s) in the past

3 weeks ⌄

From/in the following Groups

+

Update Progress >

Interaction >

+ Add Action

It will ensure the trigger isn't triggered again for the triggering person. 🗑

Done

Small Group Sign up
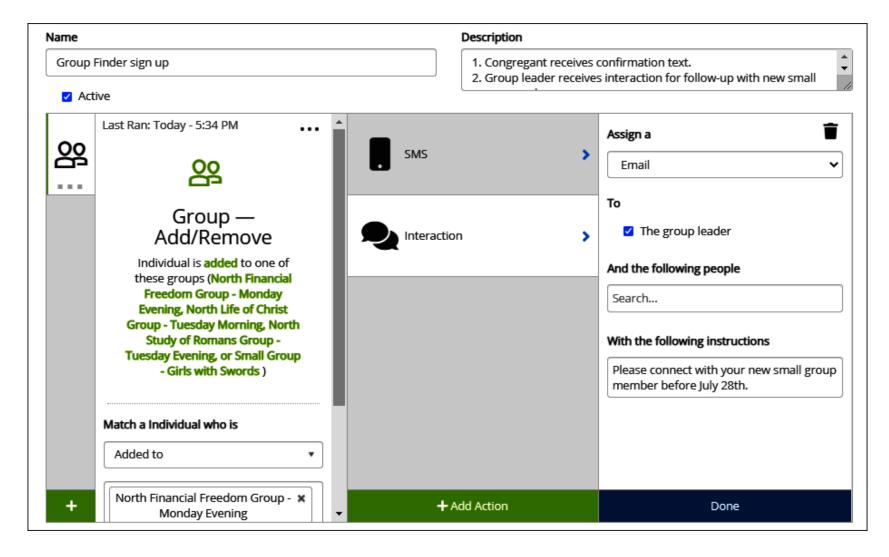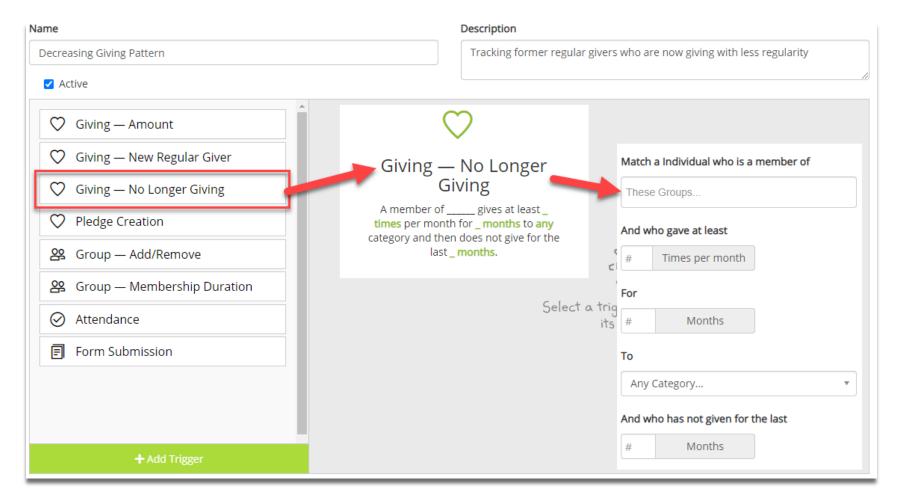

Let's say we have a congregant use the Group Finder to sign up of a Small Group.

1. Now we want the congregant to receive a confirmation text message.
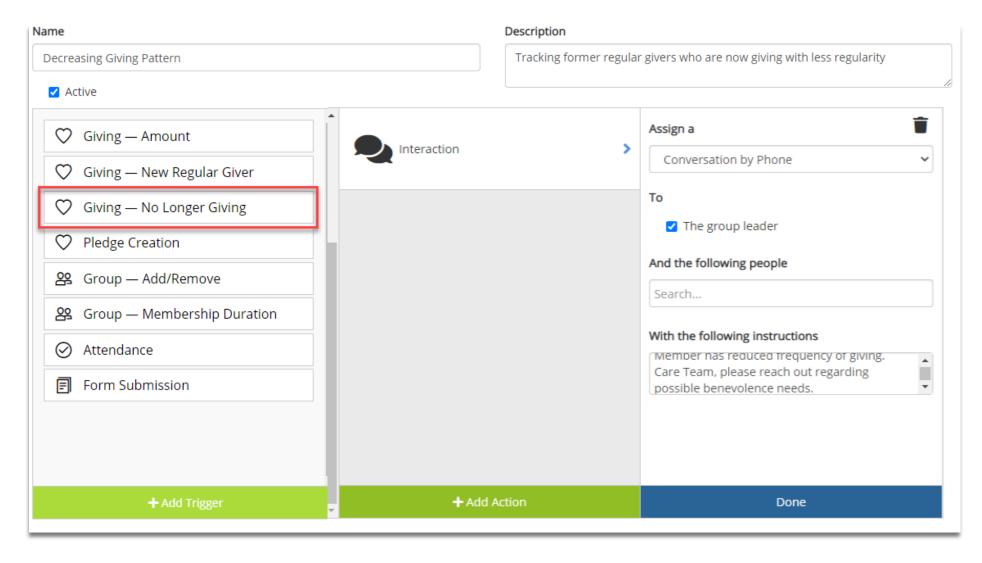2. The group leader needs an interaction to follow up with the new member to the Small Group.

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Small Group Sign up

Giving Pattern

Name

Decreasing Giving Pattern

☑ Active

Description

Tracking former regular givers who are now giving with less regularity

♡ Giving — Amount

♡ Giving — New Regular Giver

♡ Giving — No Longer Giving

♡ Pledge Creation

👥 Group — Add/Remove

👥 Group — Membership Duration

⊘ Attendance

🗐 Form Submission

+ Add Trigger

Giving — No Longer Giving

A member of _____ gives at least _ **times** per month for _ **months** to **any** category and then does not give for the last _ **months**.

Select a trig
its

Match a Individual who is a member of

These Groups...

And who gave at least

[#] Times per month

For

[#] Months

To

Any Category... ▼

And who has not given for the last

[#] Months

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Giving Pattern

Name

Decreasing Giving Pattern

Description

Tracking former regular givers who are now giving with less regularity

☑ Active

♡ Giving — Amount

♡ Giving — New Regular Giver

♡ **Giving — No Longer Giving**

♡ Pledge Creation

👥 Group — Add/Remove

👥 Group — Membership Duration

⊘ Attendance

▤ Form Submission

💬 Interaction →

Assign a 🗑

Conversation by Phone ▾

To

☑ The group leader

And the following people

Search...

With the following instructions

Member has reduced frequency of giving.
Care Team, please reach out regarding
possible benevolence needs.

+ Add Trigger

+ Add Action

Done

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Where can I watch this video again?

Watch or Register to attend Webinars

@ Community.Shelbysystems.com

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Next "Advance Your Knowledge" Webinar

- Topic: [A Quick Look at Best Practices for Groups and Promotions](#)

  Learn how to best use Groups and structure them to keep track of ministries and members. See the most efficient ways to promote classes and move members from group to group while keeping attendance history. Staff Trainers Carmen Dea and Mark Crain will show you a good overview of working with Groups to maximize your ministry and keep up with your members.

- Date: July 28, 2021

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

- Led by: Carmen Dea and Mark Crain

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New Virtual Workshops are here!

- Enrollment is now open for May or June 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

Virtual Training Workshops
ChMS 101 / ShelbyFinancials 101

Click Here to Register

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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

Check out the 2021 VBS form for more info & ideas!

How to Manage Workflows

Look here for more info on Ministry One!

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