

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, monochromatic blue.

# **SHELBY SYSTEMS®**

## **Advance Your Knowledge Webinar Series**

### **Leveraging Payment Processing**

#### **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



Goals



Leeann Buttram



Ben Lane



Carmen Dea

Introduce our panelists



Why this webinar?

Why now?

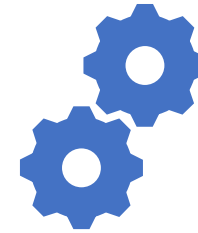
## Benefits



Business Continuity



Flexibility



Streamlining Services  
and Processes

## ShelbyNext Giving Integrated with Financials or Arena

Organization

Individual

- Completes transaction online using ShelbyNext Giving Form

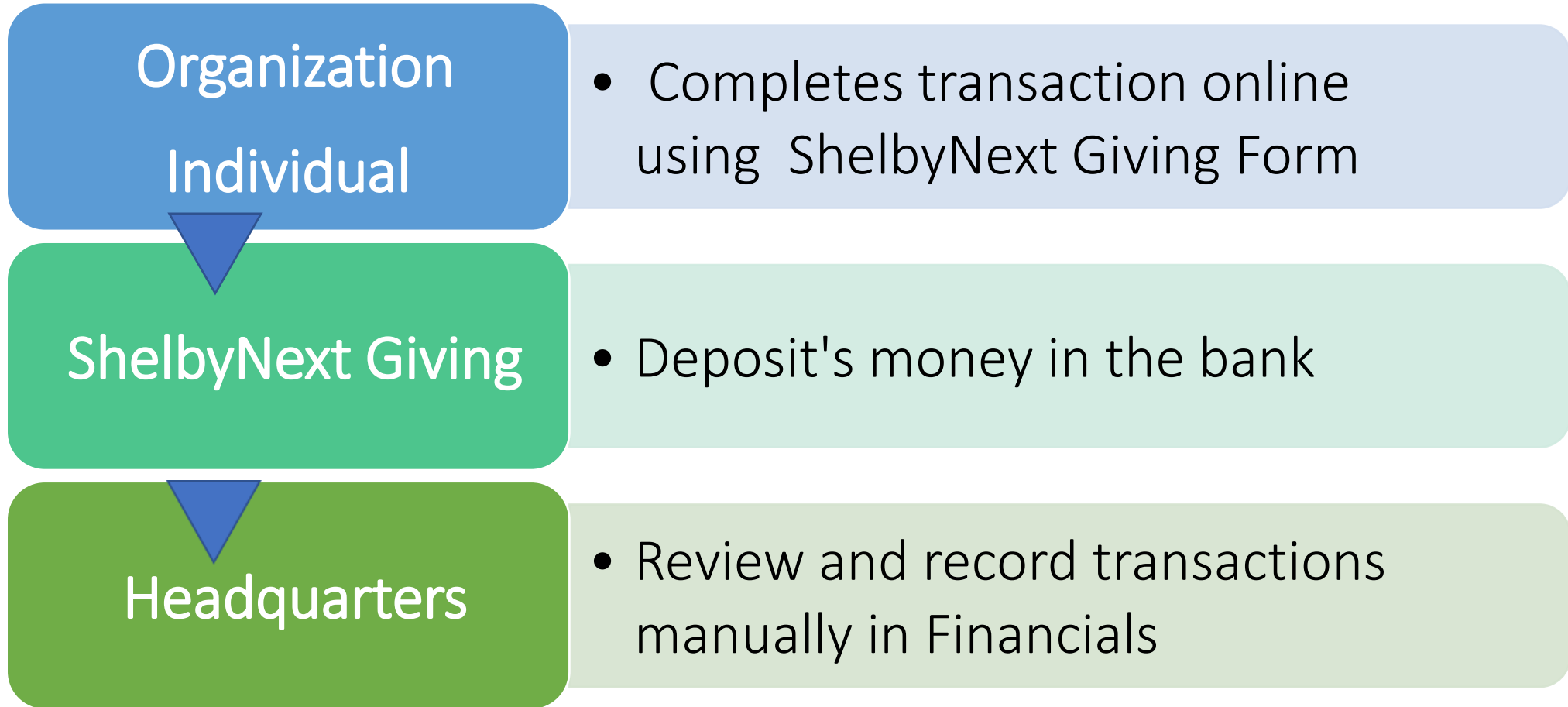
ShelbyNext Giving

- Sends transaction to Financials or Arena and deposits money in the bank

Headquarters

- Review and finalize transactions in Financials or Arena


## ShelbyNext Giving as a Stand-Alone Product



# Flexibility of Forms

**Enhance Missions**

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




Thank you for your gift! Your generosity helps support the mission and vision of the church in action. We believe God's people are to be His hands and feet, serving both their communities and the world for His glory. We appreciate your financial partnership and support that allows us to continue our work and even expand our reach for His Kingdom.

**CONTRIBUTE**

MAKE THIS GIFT RECURRING

**Youth Retreat 2020**

[FORM](#) [SIGN IN](#)



Please complete the registration form below for each student in your household.

**Student 1 \$150.00**

FIRST NAME

LAST NAME

**Address**

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

ZIP

**T-SHIRT SIZE**

S
  M

## Form Payment Options

### Payment Field Options

- Fund Drop-Down
- Base Amount
- Checkboxes/Radio/List
- Amount Buttons
- Calculated Amount (tickets)
- Person Field Sets

### Payment Flexibility

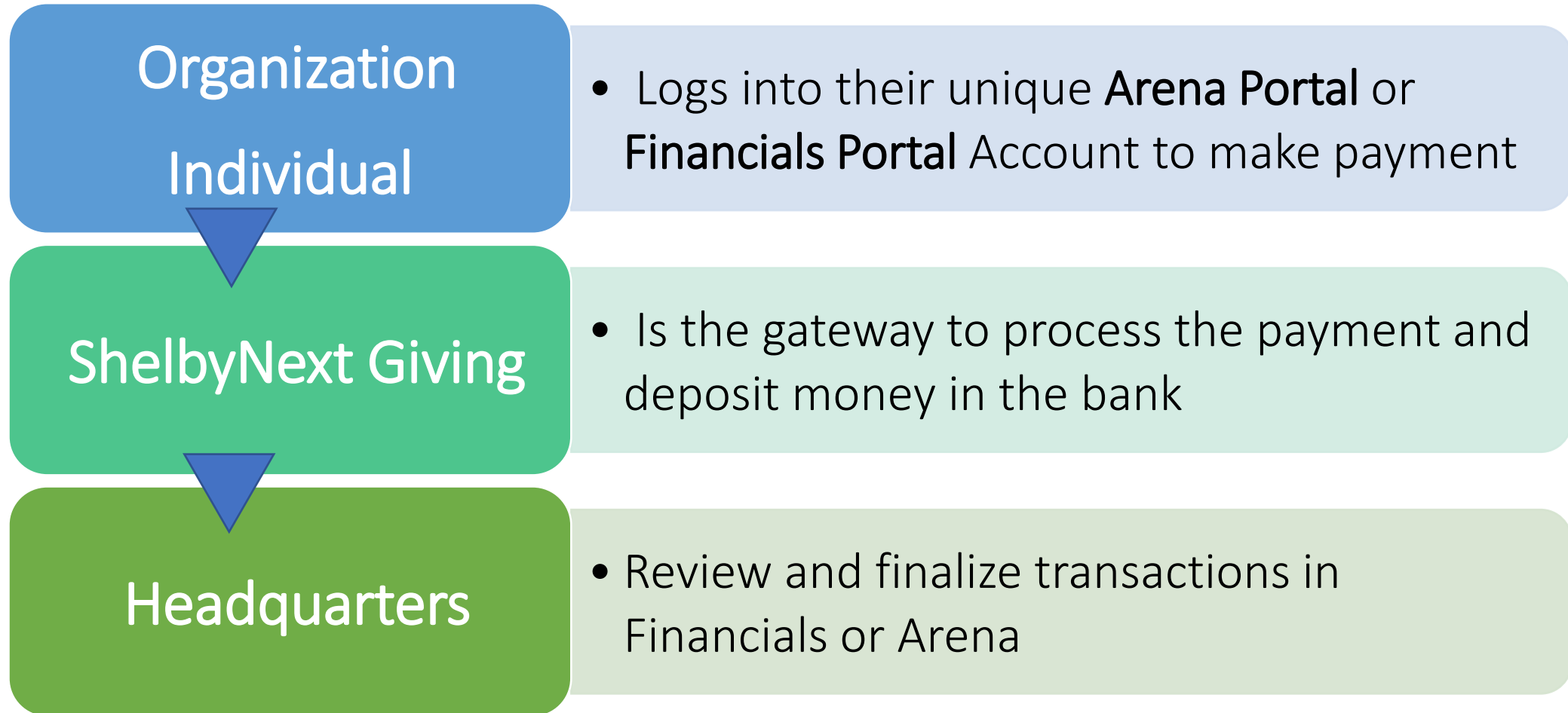
- Pay Later
- Discount Codes
- Partial Payments
- Donor covers fees
- Recurring payments

## All The Options

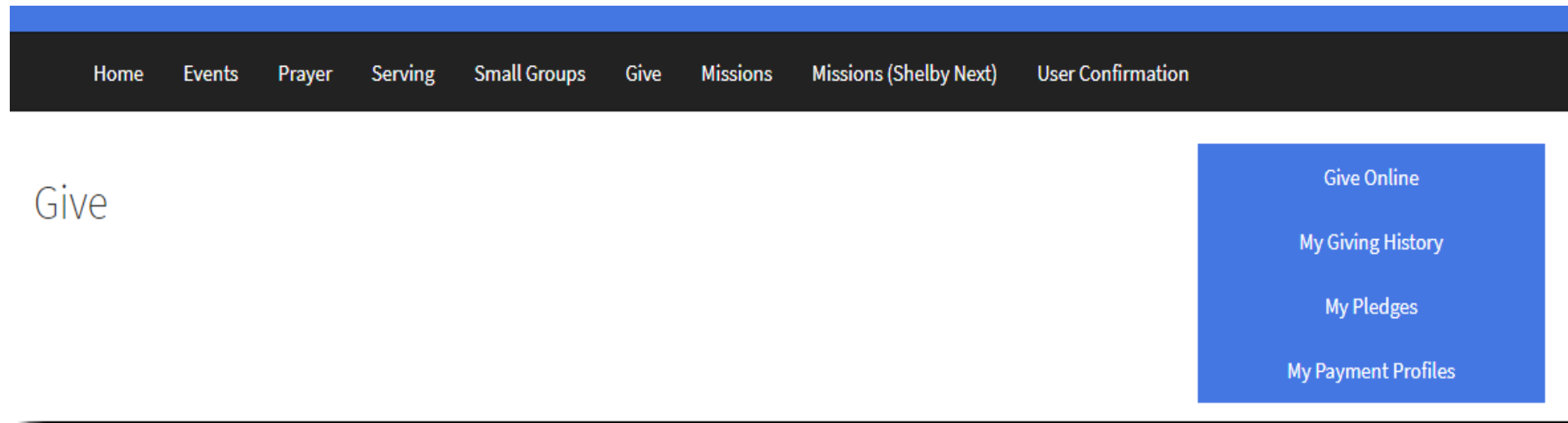
- Custom Form Builder
- Reporting by Transaction or Deposit Batch
- Multiple Depository Accounts
- Donor Importer
- Event Ticketing
- Text Giving
- Form Keywords with Text



## Financials or Arena Using ShelbyNext Giving as a Gateway



## Advantages of Using Arena Online Giving Portal



- Single credentials for all Arena functions
- Can give without logging in
- Can enter pledges on-line
- Can view all giving history
- Can modify or delete Payment Profiles
- Allows for multiple giving pages for different purposes or locations.
- The information entered is immediately entered into Arena.

## Arena Portal – Giving (Top)

### Give Online

**Contact Information**  
Please confirm your contact information below.

<b>First Name</b>	<input type="text"/>	<b>Last Name</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>	<b>Home Phone</b>	<input type="text"/>
<b>Street Address</b>	<input type="text"/>	<b>City</b>	<input type="text"/>
<b>State</b>	<input type="text"/>	<b>Zip Code</b>	<input type="text"/>
		<b>Country</b>	<input type="text" value="United States"/>

Setup Scheduled Gift?

## Arena Portal – Giving (Lower)

Setup Scheduled Gift?

### Giving Amount

Enter the amount that you'd like to give.

Is this gift in honor of someone?

<b>Tithes and Offerings</b>	\$ <input type="text"/>
<b>Payment Total</b>	\$ 0.00

### Payment Information

Enter how you would like to make your automated contribution.

**Payment Method**       Credit Card  Bank Account

### Credit Card Information

You will be redirected to a secure Payment Data Systems site. For more information about the redirect, click [here](#).

## Arena Portal – Missions

- Arena is the only Shelby product that offers a specific, full featured module for organizing and tracking Mission Trips

The screenshot displays the 'Trip Information' section of the Arena Portal. At the top, there is a navigation bar with four steps: 'Trip Information' (highlighted in blue), 'Billing Information', 'Payment Information', and 'Verification'. Below the navigation bar, the 'Trip Information' section contains the following fields and options:

- Mission Trip:** A dropdown menu with 'Mexico Dental' selected.
- Select an Action:** Three radio button options:
  - Register yourself or a family member
  - Contribute to the mission trip or on behalf of an individual
  - Make a Payment for yourself or a family member
- Trip Attendee:** A dropdown menu with 'Rev. Ben Lane' selected.
- Payment Amount:** Five radio button options:
  - Deposit 1 Amount: \$ 250.00
  - Deposit 2 Amount: \$ 0.00
  - Deposit 3 Amount: \$ 0.00
  - Total Registration Cost: \$ 1,250.00
  - Balance Due: \$ 750.00
  - Other Amount: \$

# Where can I see these transactions in Arena?

- Contributions and Missions

**Batch List**  
Contribution Batch List

**Filter**

From:

Through:

Batch Name:

Finalized:

**Apply Filter**

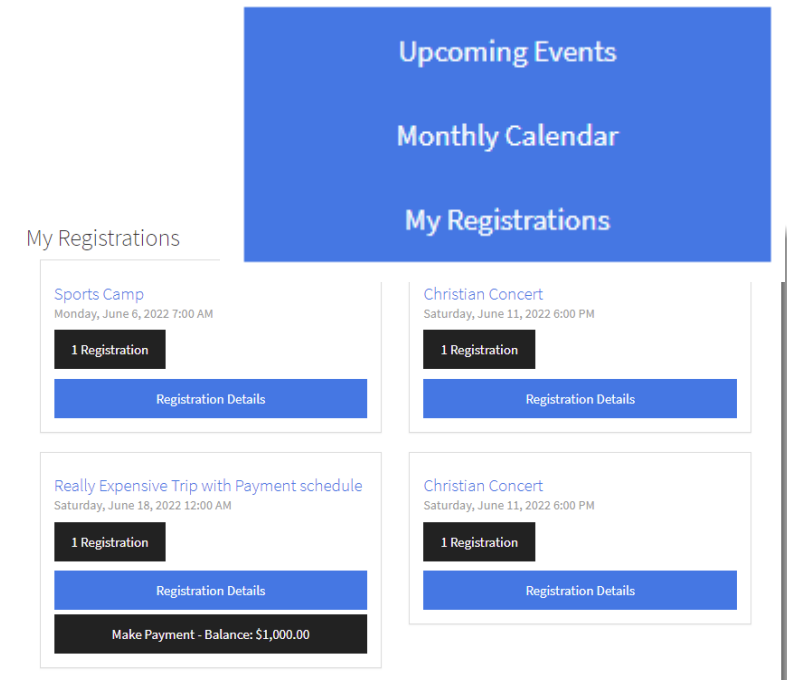
<input type="checkbox"/>	ID	Batch	Date	Control Amount	Contribution Total	Difference	Contributions	Finalized	Exported	Report	Fund(s)	Type
<input type="checkbox"/>	1235	Refunded	5/30/2018 12:00 AM	(\$500.00)	(\$500.00)	\$0.00	1				General Undesignated Offerings: (\$500.00)	Unknown
<input type="checkbox"/>	1227	pledge	6/5/2018 12:00 AM - 6/14/2018 12:00 AM	\$1,000.00	\$1,000.00	\$0.00	1				13 Budget Giving 2008: \$1,000.00	Unknown
<input type="checkbox"/>	1216	new	1/1/2017 12:00 AM - 10/10/2017 12:00 AM	\$1,000.00	\$1,000.00	\$0.00	1				General Undesignated Offerings: \$1,000.00	Unknown
<input type="checkbox"/>	1215	vsstgfl	7/16/2017 12:00 AM - 7/20/2017 12:00 AM	\$54,321.00	\$54,321.00	\$0.00	1				General Undesignated Offerings: \$54,321.00	Unknown
<input type="checkbox"/>	1214	vvv	7/2/2017 12:00 AM - 7/12/2017 12:00 AM	\$100.00	\$100.00	\$0.00	1				General Undesignated Offerings: \$100.00	Unknown
<input type="checkbox"/>	1213	add text	5/30/2016 12:00 AM - 7/12/2017 12:00 AM	\$175.00	\$175.00	\$0.00	1				Building Campaign: \$175.00	Unknown
<input type="checkbox"/>	1204	Pledge	12/30/2016 12:00 AM - 3/1/2017 12:00 AM	\$5,000.00	\$5,000.00	\$0.00	2				General Undesignated Offerings: \$500.00 13 Budget Giving 2008: \$4,000.00 Home Missions: \$500.00	Unknown

Page: 1 of 1 Page Size: 1700 Refresh 7 Batches

**Finalize and Export**

## Benefits of Using Events in Arena

- Flexible payment options including multiple payments
- Single sign on for all Arena functions
- E tickets
- Can sign up for breakout session in an event
- Can see all the events where you are currently registered
- Can register without providing login credentials (anonymously)
- Promotion of events by calendar and web promotions
- Automated email communications for confirmation and reminders
- Can restrict registrants by age, grade, and gender



## Arena Portal - Events

### Bring your pet to Church



Join thousands of others as we worship God with our little furry friends.

Register for this Event

Bring your pet to Church

6/24/2020 3:00 PM - 3:59 PM

<b>Family Member</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
	Family Member
<b>Select Family Member</b>	<input type="text" value="Add New Family Member"/>
<b>First Name</b>	<input type="text" value="Ben"/>
<b>Last Name</b>	<input type="text" value="Lane"/>
<b>Address</b>	<input type="text" value="3762 Misty Oak Drive"/>
<b>City</b>	<input type="text" value="Memphis"/>
<b>State</b>	Ten <input type="text" value="38125"/>
<b>Zip</b>	
<b>Home Phone</b>	<input type="text" value="(901) 486-4750"/>
<b>Cell Phone</b>	<input type="text"/>
<b>Fax</b>	<input type="text" value="(258) 963-2587"/>
<b>Email</b>	<input type="text" value="ben.lane@shelbyinc.com"/>
<b>Vaccination Date</b>	<input type="text"/>
<b>T shirt Size</b>	<input type="text"/>



# Where can I see these transactions in Arena? Events

**Filter**

From:

Through:

First Name:

Last Name:

Transaction Detail:

Transaction Type:

Payment Type:

Payment Method:

Export Status:

[Apply Filter](#)


Transaction Date	Transaction Type	Payment Type	Payment Method	Transaction Detail	Amount	Applied Amount	Registrants	Notes	Created	Exported
2/14/2019	Manual	Full Payment		2345	\$25.00	\$25.00	Beaty, Gerry	Beaty, Gerry	2/14/2019 By Rev. Ben Lane	
11/28/2017	Manual	Full Payment	Check	32	\$10.00	\$10.00	Lane, Ben	Lane, Ben	11/28/2017 By Rev. Ben Lane	
2/4/2014	Manual		Check		\$5.00	\$0.00	Hitt, George	Hitt, George	2/4/2014 By Rev. Ben Lane	
8/2/2012	Manual	Full Payment	Check		\$5.00	\$5.00	Whiner, Ima	Whiner, Ima	8/2/2012 By Rev. Ben Lane	
8/2/2012	Manual		Cash	NSF 1234	(\$5.00)	\$0.00	Whiner, Ima	Whiner, Ima	8/2/2012 By Rev. Ben Lane	
7/19/2012	Manual				\$0.00	\$0.00	Albert, Don	Bishop, Nathan	7/19/2012 By Rev. Ben Lane	
9/28/2011	Manual				\$0.00	\$0.00	Hitt, George	Hitt, George	9/28/2011 By Rev. Ben Lane	
9/13/2011	Manual				\$0.00	\$0.00	Arnold, Ashleigh	Arnold, Ashleigh	9/13/2011 By Rev. Ben Lane	
3/24/2011	Manual		E-Check		\$0.00	\$0.00	Belzer, Mike	Belzer, Mike Rubble, Barney	3/24/2011 By Rev. Ben Lane	
7/20/2010	Manual		E-Check		\$0.00	\$0.00	Flinstone, Pebbles	Flinstone, Pebbles	7/20/2010 By Rev. Ben Lane	
1/21/2010	Manual				\$0.00	\$0.00	Zimmerman, Bobby	Zimmerman, Bobby	1/21/2010 By Rev. Ben Lane	

## Donor's and Gifts Custom Form

- Create your own custom forms for...
  - Church or Individual Payments toward Pledges
  - Special Mission Giving
  - Building Projects
  - Any type of Giving
- Every form submission can have an instant one-time gift receipt
- Recurring payments

Support the Mission

GIVE NOW SIGN IN



"Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up." Galatians 6:9

Our Support

FUND AMOUNT

Choose a Fund \$

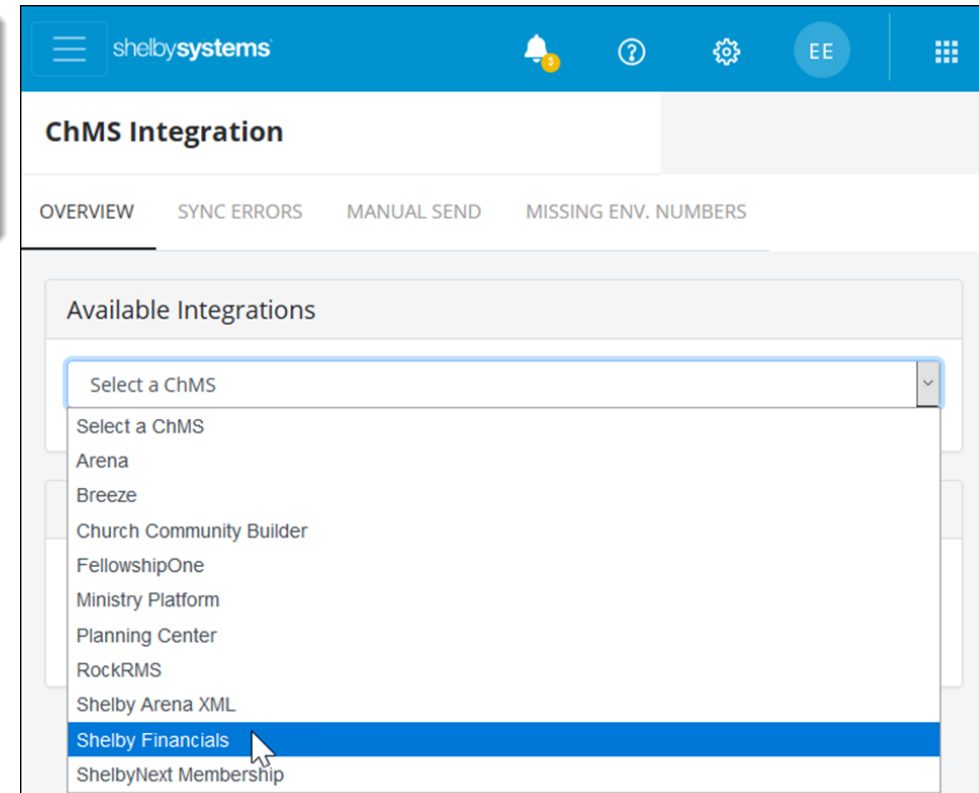
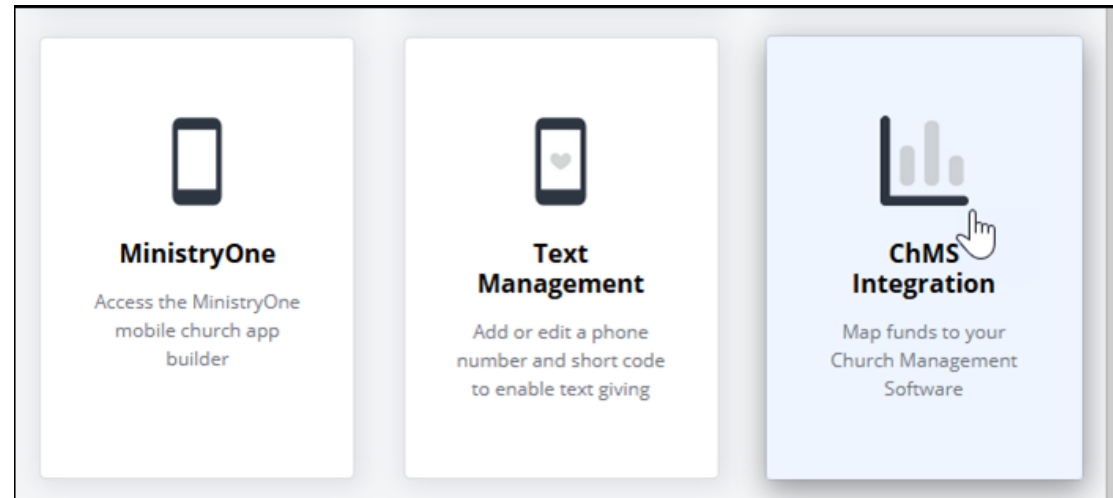
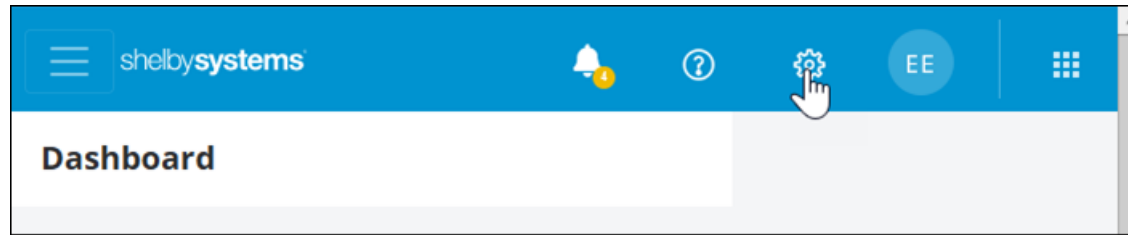
+ ADD DONATION

Please enter the amount of your monthly pledge and donations

Make this gift recurring

SUBMIT

# ShelbyNext Giving Integration with Shelby Financials



# Setup in Shelby Financials Utilities

The top screenshot shows the Shelby Financials web interface. The user is logged in as 'System Administrator'. The 'Utilities' menu is open, and 'Organization' is selected. The page shows the 'Home' section with 'Select Control' buttons.

The bottom screenshot shows the 'Organization' settings page. The user is logged in as 'Edward Eoff'. The page shows the 'Home > Utilities > Organization' breadcrumb. The 'Security Settings' section is expanded, showing the following fields:

- Organization Information
- Default Settings
- Security Settings
  - Password Strength: Medium
  - Pswd Strength Message: Password must be between 5 and 30 characters
  - Security Lock Account
    - Threshold Count: 10
    - Threshold Minutes: 5
    - Duration Minutes: 15
  - Donors and Gifts API Security
    - API Secret: [Text Field] **Generate Secret**

- Generate the Secret API code

## Where to paste the API Secret (URL's) in ShelbyNext Giving

- This secret URL is needed to connect Financials to ShelbyNext Giving

### Shelby Financials Integration

**shelbyfinancials**

This integration will synchronize transactions by importing them into your Shelby Financials account automatically.

**FREE** - there is no charge to use this add-on

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There are two pieces of information required in order for this giving system to be able to communicate with your Shelby Financials instance.

**1. Shelby Financials URL**  
This is the base URL that your Shelby Financials instance uses. For example  
http://organization.shelbylabs.com

**2. API Secret**  
You can find the API secret for your instance of Shelby Financials at Utilities -> Organization -> Security Settings.

**Enter your Shelby Financials URL**

**Enter your Shelby Financials API secret**

# Mapping Shelby Financial Purpose Codes to ShelbyNext Giving

**Fund Mappings**

Please setup fund mappings below so that donations will go in the appropriate category within Shelby Financials. Mappings to a location will take priority over mappings set to All locations. When a default mapping is set, any funds not mapped will be routed to the default mapping. Unmapped funds will not be submitted if there is not a default mapping set.

**No fund mappings setup.** You must map at least one fund in order for the integration to work.

**Add New Fund Mappings**

**Giving System Fund:**

**Shelby Financials Company:**

**Purpose**

**Location:**

**Default Fund:**

Home > Donors And Gifts > Purposes > Update

\* Code

\* Name

**BASIC INFO.** NOTE

Valid Between Dates  -

Active?

\* Online Name

Bank Account

Department

\* Account #  -

Tax Deductible?

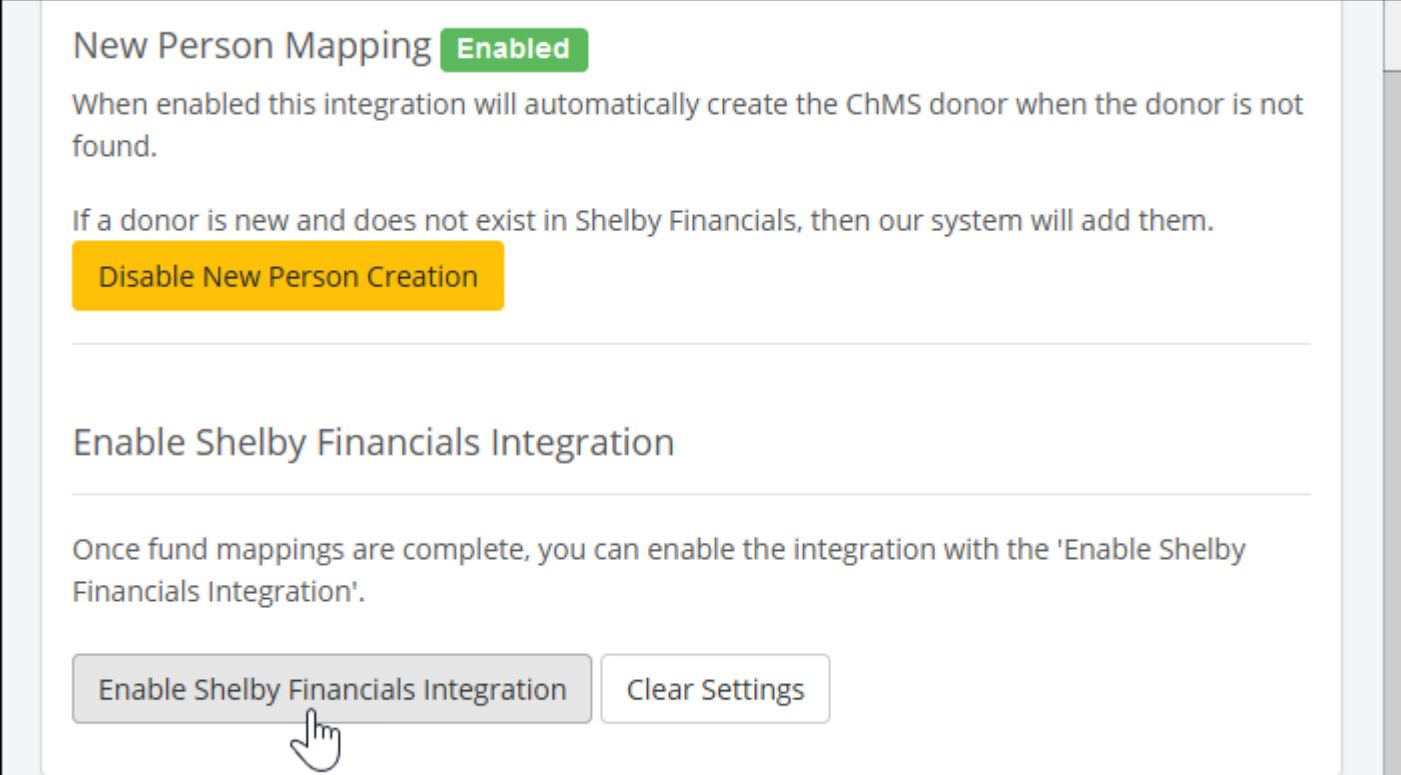
Allow Pledges?

Default Project

Date First Gift  Date Last Gift

## ShelbyNext Giving Enabled with Shelby Financials


- Creates new donors when they are not in Donor's & Gifts
- This can be disabled if that's your preference





The screenshot shows a settings page for the Shelby Financials integration. At the top, it says "New Person Mapping" with a green "Enabled" status indicator. Below this, there is explanatory text: "When enabled this integration will automatically create the ChMS donor when the donor is not found." and "If a donor is new and does not exist in Shelby Financials, then our system will add them." A yellow button labeled "Disable New Person Creation" is visible. A horizontal separator line follows. Below the line, the section is titled "Enable Shelby Financials Integration". Another explanatory text block states: "Once fund mappings are complete, you can enable the integration with the 'Enable Shelby Financials Integration'." At the bottom, there are two buttons: "Enable Shelby Financials Integration" (which is highlighted with a hand cursor) and "Clear Settings".

# Payments appear in Shelby Financials once entered online

Home > Donors And Gifts > Unposted Gifts > Update Gift

 Setup by Carmen Dea (#1738) on 1/28/2021


\* Donor [First Lutheran \(#2037\)](#) 







\* Payment Date   Check #

\* Gift Total

Anonymous?  Non-Cash?  Use ACH?

**DISTRIBUTION** ATTACHMENTS NOTE

Add  New Lines 

Purpose	Pledge	Amount	Project	Commemorative	SubDonor
GENERAL General Fund Pledge	\$10,000.00	\$834.00	<input type="text"/> 	<input type="text"/>	(not set) 
FOREIGN Foreign Missions		\$250.00	<input type="text"/> 	<input type="text"/>	(not set) 
LOCAL Local Missions		\$250.00	<input type="text"/> 	<input type="text"/>	(not set) 
		\$1,334.00			

[Reset or Cancel](#)




...And creates a batch

- No manual entry
- Batched




Home > Donors And Gifts > Unposted Gifts > Update





Batch# 1, Setup by Dea, Carmen (#1738) on 1/28/2021

\* Batch Date  

Verify Amount       Verify Count

[Add New Gift](#)

Name ▲	Date	Amount	ACH	Attach	Note	Setup
  First Lutheran (#2037)	1/28/2021	\$1,334.00				
<b>1 entries</b>		<b>\$1,334.00</b>				

          Page size:

     [Reset or Cancel](#)

## Accounts Receivable – Shelby Financials Portal Login

- Use the same URL for Shelby Financials and add “/ Portal” to the end

Financials Home x +

← → ↻ X myshelby.org/financials/portal

### Shelby Training


#### Shelby Financials

User Name

Password

[Log On](#) [Forgot Password?](#) or [Forgot User Name?](#)

OR

 [Login with MinistryID](#)

[What's This?](#)

# Accounts Receivable – View of Invoice in Portal

Shelby Training Invoices

Welcome First Church [ [Log Off](#) ]

Accounts Receivable Portal for First Church

Church Support ▾

Unpaid Invoices 
  Paid Invoices 
  All Invoices

Invoice #	Date	Due Date	Amount	Sales Tax	Payments	Discounts	Write Offs	Outstanding	Payment Amount
1	1/1/2021	1/1/2021	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	\$0.00

Description	Quantity	Unit Price	Amount
Monthly Support	1	\$1,000.00	\$1,000.00
Foreign Missions	1	\$250.00	\$250.00
Local Missions	1	\$250.00	\$250.00
	3		\$1,500.00

1 invoices			\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	\$0.00
------------	--	--	------------	--------	--------	--------	--------	------------	--------

[Pay Invoices](#)

# Accounts Receivable - Credit Card or ACH Payment Fields

Church Support

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Pay Invoices

Invoice #1, Church Support, Due 1/1/2021	\$1,500.00
<b>Total Amount</b>	<b>\$1,500.00</b>

Verify Billing Information

\* First Name

\* Last Name

\* Address

\* City

\* State

\* Postal Code

Country

\* Phone Number

\* Email

Credit Card  Bank Account

Credit Card Information

Card Type

\* Card Number

\* Security Code

Expiration Date




\*  I authorize 2 Church of the Resurrection to collect \$1,500.00 from my account.  
I hereby authorize 2 Church of the Resurrection, Memphis, TN to collect from my Account the above amc

# Payments appear in Accounts Receivable ready to post

Home > Accounts Receivable > Payment Processing ? Add To My Tasks

Filters ▼

Add New Payment Choose File No file chosen Import Shelby Teller

<input type="checkbox"/>	Bill To	Check #	Payment Date	Check Amount	Unapplied Cash	ACH	Attach	Note	Setup
<input type="checkbox"/>	  First Church		1/1/2021	\$1,500.00	\$0.00				
<b>1 entries, 0 selected</b>				<b>\$1,500.00</b>	<b>\$0.00</b>				

⏪ ⏩ 1 ⏪ ⏩
Page size: 100 ▼
1 items in 1 pages

Payment Edit Report
Process Payments

## Accounts Receivable – Portal Task Role

- The Church or Individual will have a Free external user account.

shelbynext | financials Shelby Training

Applications Security Setup Utilities Help

Home > Security Setup > Task Roles > Update

\* Task Role Name

TASK USERS

Please select a Module

Remove All Rights Assign All Rights

Description	Inquiry	Full Rights
Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accounts Receivable		
View & Pay	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchasing Management		
Enter & Manage	<input type="checkbox"/>	<input type="checkbox"/>
Record General Ledger accounts		<input type="checkbox"/>
Payroll		
Request Time Off	<input type="checkbox"/>	<input type="checkbox"/>
View Earnings	<input type="checkbox"/>	<input type="checkbox"/>
Approve Time Off		<input type="checkbox"/>
Remittance		
View & Pay		<input type="checkbox"/>







Accounts Payable  
Accounts Receivable  
Bank Account Management  
Deposits On Hand  
Donors And Gifts  
Financials  
Fixed Assets  
General Ledger  
Insurance Billing  
Loan Processing  
Payroll  
Pension Billing  
**Portal**  
Purchasing Management  
Remittance

## Accounts Receivable Setup for Payment Providers

- Credit Cards and ACH

Home > Utilities > Payment Providers

[Add New Provider](#)

Title		Processor
 		
 	SNGCC	Shelby Giving
 	SNGACH	Shelby Giving

Page size: 100

# Remittance - View of Pledge in the Portal

Remittance

Welcome First United Methodist Church [ [Log Off](#) ]

Remittance Portal for First United Methodist Church Memphis, TN

Activity	Annual	Outstanding	YTD Paid	YTD Expected	Due	Enter Payment
000010-Tithe	\$5,000.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00	\$416.67
000020-Africa	\$5,000.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00	\$416.67
						\$0.00


Process Payment for \$833.34



# Remittance Payments appear in Unposted Remittances Batch



Home > Remittance > Unposted Remittances > Update



Setup by Dea, Carmen (#1738) on 1/27/2021



\* Batch Date   \* Batch Name

\* Verify Amount  \* Verify Count

[Add New Remittance](#)

Church	Date	Amount	Note	Attach
  First United Methodist Church (#1587)	1/4/2021	\$833.34		
<b>1 entries</b>		<b>\$833.34</b>		



 Page size:

[Update](#) [Reset or Cancel](#)

# Task Role for Remittance

Home > Security Setup > Task Roles > Update

\* Task Role Name

**TASK**    USERS

Please select a Module

Description	Inquiry	Full Rights
Portal	<input type="checkbox"/>	<input type="checkbox"/>
▼ Accounts Receivable		
View & Pay	<input type="checkbox"/>	<input type="checkbox"/>
▼ Purchasing Management		
Enter & Manage	<input type="checkbox"/>	<input type="checkbox"/>
Record General Ledger accounts		<input type="checkbox"/>
▼ Payroll		
Request Time Off	<input type="checkbox"/>	<input type="checkbox"/>
View Earnings	<input type="checkbox"/>	<input type="checkbox"/>
Approve Time Off		<input type="checkbox"/>
▼ Remittance		
View & Pay		<input checked="" type="checkbox"/>

[Reset or Cancel](#)

# Remittance Online Payment Setup

[Home](#) > [Remittance](#) > [Company Preferences](#)

Naming Conventions	
Total Levels	
Pledge Percents	
Cross Check	
<b>Online Payments</b>	

**Bank Account**  ▼

**Credit Card Gateway**  ▼

**ACH Gateway**  ▼

**Update** [Reset or Cancel](#)

It's no secret that online payments benefit you and the payer

- Saves Time - Eliminates the need to manually enter or scan checks
- Reduces lag time – Funds are in the bank faster
- Convenient - Now more than ever paying bills can be a burden and this eliminates physical checks

## Next Steps



REVIEW THE RESOURCES AVAILABLE



**SCHEDULE TIME FOR FREE CONSULTATION  
WITH A STAFF TRAINER**

## Resources


 [ShelbyNext Financials Portal](#)

 [Payment Gateway Directions](#)

 [ShelbyNext Giving Forms](#)

 [Arena Portal](#)

 [Arena Missions](#)

 [Arena Events](#)

 [Training@shelbyinc.com](mailto:Training@shelbyinc.com)