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Advance Your Knowledge
Webinar Series

A Quick Look at Best Practices for
Groups and Promotions

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

Carmen Dea
ShelbyNext Trainer

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Three Sections of Today's Webinar

- Group Basics

- Advanced Topics

- Promotions

Building New Groups

- Groups are one of the core features of ChMS.

- There is no limit to the number of groups in your ChMS.

- There are a multitude of group level settings that impact program functions, like attendance, group finder, leader roles, and more.
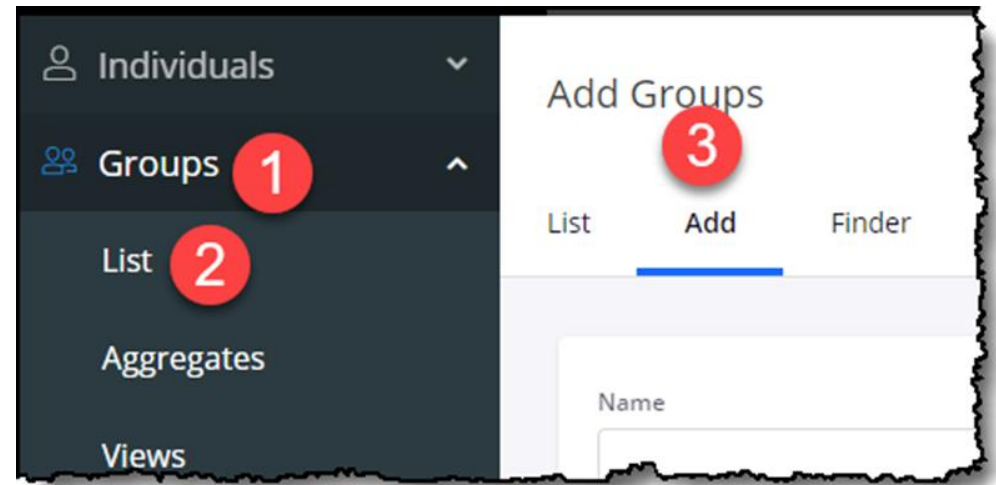
Group Management

- Because groups are unlimited, it is important to routinely maintain your groups.

- Archiving or deleting groups may be appropriate.

- An important conversation to have as a staff.

- Every group can be used for attendance taking, for mass communications, and more.

- Groups can be made "public knowledge" for the group members or kept private for internal staff use.

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Naming Conventions, Properties, & Views

- Naming conventions provide a scaffold for group builders to use to maintain consistency in the groups list.

- Using prefixes, widely understood codes, or even * can help provide order.

- Example: Use "Sunday School" at the beginning of every Sunday School class.

- Properties are user-defined classifications for various groups that are associated with one another, i.e. Classes, Committees, Youth, Children, etc.

- Group Views allow users to predefine a selection of groups, properties, and aggregates to display.

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Naming Conventions, Properties, & Views

Naming Conventions, Properties, & Views

	Search Groups...
	▲ Name
☐	*Member Status = Member
☐	*Member Status = Misc. Names
☐	*Member Status = Non-Resident Member
☐	*Member Status = Prospect
☐	*Member Status = Regular Attender
☐	Board of Deacons
☐	Board of Elders
☐	Children's Sunday School Teacher
☐	Choir - Adult
☐	Committee - Buildings & Grounds
☐	Committee - Church Council
☐	Committee - Church Promotion

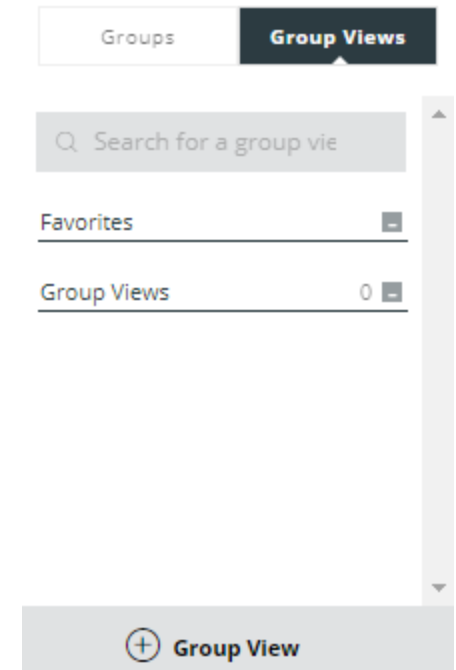|	sun
	▲ Name
☐	Children's Sunday School Teacher
☐	Sunday School - Adult 60 + Singles
☐	Sunday School - Adult Singles 35 to 59
☐	Sunday School - Adult 2 Ladies Class
☐	Sunday School - Adult 2 Men's Class
☐	Sunday School - Adult 3 Ladies Class
☐	Sunday School - Adult 3 Men's Class
☐	Sunday School - Adult 4 Ladies Class
☐	Sunday School - Adult 4 Men's Class
☐	Sunday School - Adult 5 Ladies Class
☐	Sunday School - Adult 5 Men's Class
☐	Sunday School - Adult 6 Ladies

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Properties and Group Views

- Properties are tags that are placed on groups that categorize groups with shared traits.

- Both properties and categories of properties are completely customizable.

- Some examples of popular categories of properties: Age Groups, Campus, Group Type, Type of Attendance

Properties and Group Views

- Group Views are shareable selections of specific Properties, Groups, and Aggregates.
  - Aggregates are a selection of groups primarily used for attendance reporting purposes.

- Group Views are very helpful for creating mailing lists of multiple groups, selections of small groups for printing attendance rolls, etc.

Properties and Group Views

Information Columns and Sorting

Using Groups for Communication

- Use Groups to....
  - Create labels
  - Send Emails, Texts, or Voice Message
- No complex criteria to determine who will be included. Just check the box(s).
- Need it addressed to a couple? Put both names in the group.
- To print or Export, select the Group, click on the action link (3 dots) and choose CSV to export or labels to print.

Using Groups to Print a Directory

- Need a Membership or Class Directory?

- Check beside the Group(s) and choose Print Directory.

- Choose to print as Individuals or grouped in a family.

- Select options, such as Single Column, Photos, or Print Groups Separately then click Go.

- Drag fields you want to include into the left column then click Go.

Using Groups to Print Attendance Rolls

- Search form your Group(s) using either the Search, Group View or Properties, as explained earlier.

- Check beside the Group(s) and choose Print Attendance Roll

- Enter the Date for when the attendance should be taken.

- Number of Visitor Lines?

- Include Last Day Attended?

- Click Go.

Using Groups to Assign or Log Interaction

- Select everyone in or select individuals within a Group. Ex. Prospects and click Assign/Log Interactions.

- Assign (future contact request) or Log (recording past contact).

- Choose Interaction Type (ex. First Time Visitor), Assigned or Completed by, Dates, and Instructions or Summary.

- Click Log Interactions.

Archiving Groups

- Old Group history you want to keep but do not want to always see in the Group list?

- Archive Groups so they're not in the active list but still accessible.

- Makes your active Group list more manageable.

- Still use Archived Groups in email, labels, reporting, etc.

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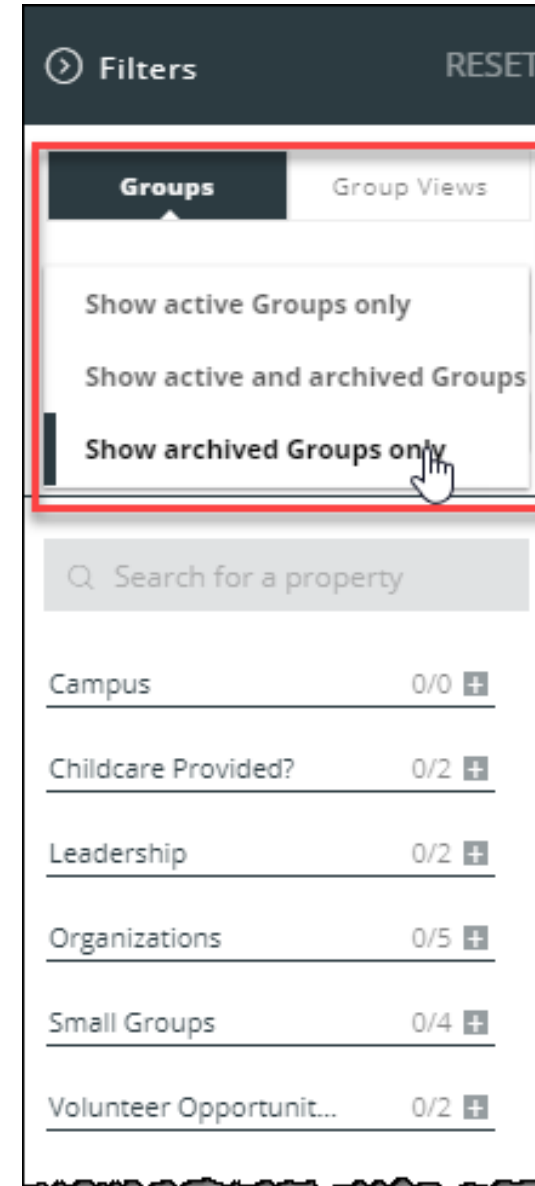
Archiving a Group using Mass Archive/Activate

- Select the Groups to Archive.

- From the Action menu choose Mass Archive/Activate.

- Click the Archive Groups.

- Click Go.
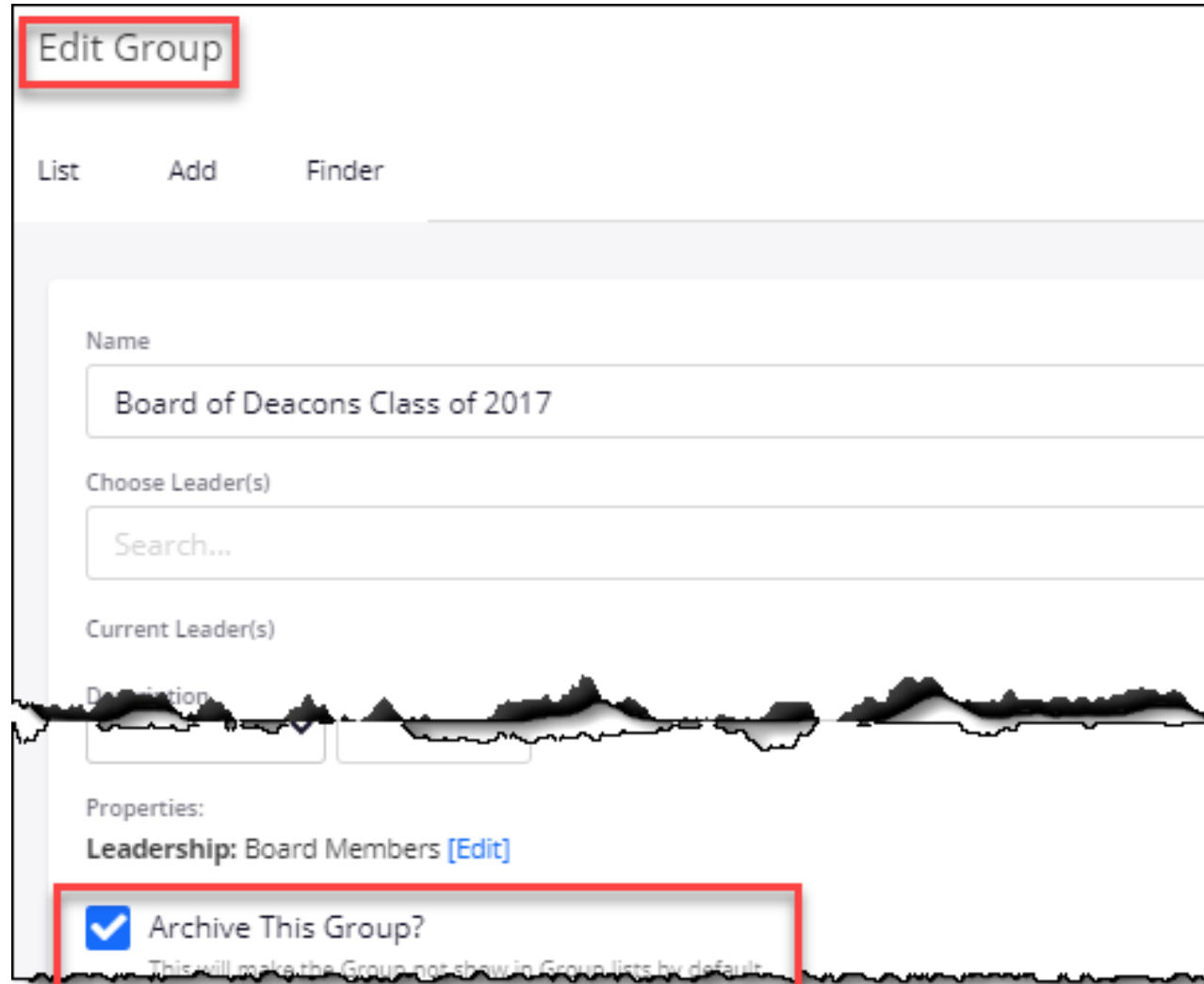
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Groups

List   Add   Finder

Show Help

...

Print Directory

Print Attendance Roll

🔘 Archive Groups   Mass Archive/Activate
⚪ Activate Groups
                          Apply Properties

                          Delete Selected Groups

                          Assign and Email Login Information

🔍 deacons

                          Print PDF List or Labels

                          Export Individuals to CSV
☐   ▲ Name   Leader(s)   Count
                          Mass Edit
☑   Board of Deacons Class of 2017   3

☑   Board of Deacons Class of 2018   3

Archiving a Group through Group Edit

- Edit within the Group.

- Check Archive This Group? Box.

- Click Save.

Edit Group

List   Add   Finder

Name

Board of Deacons Class of 2017

Choose Leader(s)

Search...

Current Leader(s)

Properties:

Leadership: Board Members [Edit]

☑ Archive This Group?

This will make the Group not show in Group lists by default.

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Re-Activating Groups

Groups

List   Add   Finder

Show Help

Q Search Groups...

Name   Leader(

Small Groups PURPOSE North Purpose Driven Life Group - Sunday Evening

Print Directory

Print Attendance Roll

Mass Archive/Activate
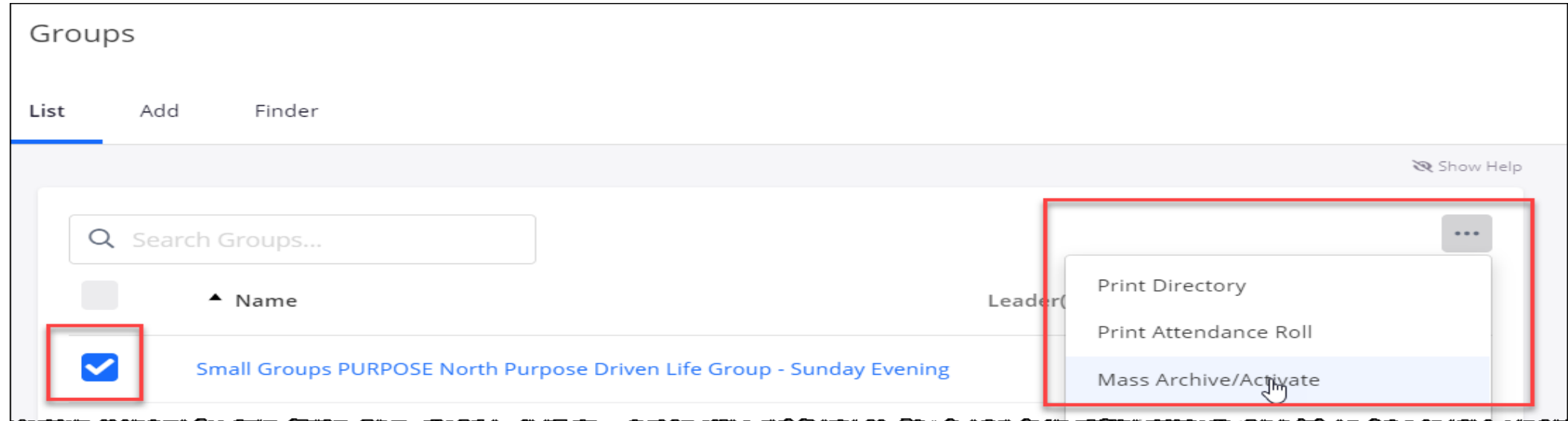
- Archiving a Group isn't permanent.
- To reactivate select the Group(s.
- Click on the Action button and Choose Mass Archive/Activate, then Go.

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In-Activating Group Members

- There are times when you want to keep a Group member in the Group, but not shown as Active. For example, they were in an Adult Sunday School class, but have not been attending for some time.

- Choose the individual(s) you want to Inactivate in the Group by selecting their name(s). Click on the action button, choose Inactivate, and then click Inactivate. You have the option to change the date of when a person in activated.

What happens when you deactivate a Group Member?

- It does not remove them from the database!

- No longer receive Mass Contacts (email, text, voice).

- No longer appears when taking attendance.

- No longer visible unless filtered by inactive individuals.

- Only inactivates them in that specific Group. Doesn't affect other groups or functions.

- Click the action button, select Filter, Check Show Inactive Individuals, then click Filter to show Inactive Individuals.

‹ Groups List

Individuals in Sunday School - Adult 2 Men's Class

Group Information   Group Activity

Group Leader(s): None (Edit)

Fields ▾   ···

Filter

Last Interaction Report

Edit Group

Active/Inactive Group Individuals

○ Show Active Individuals
○ Show Inactive Individuals
● Show All Individuals

Add Individuals to this Group

Activate

Inactivate

Add to Group

Move to Group

	First Name	Last Name	Group Last Attended Date	Active?	Join Date
☐	Harvey	Ingram	12/09/2018	N	08/28/2016
☐	Kyle	Zelder	03/07/2021	Y	08/28/2016

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Re-Activating Group Members

Sometimes individuals will rejoin a Group..

- Click on
  Filters, Inactive Individuals.
  Select Individual(s) and
  Choose Activate in the
  menu.

‹ Groups List

Individuals in Sunday School - Adult 2 Men's Class

Group Information   Group Activity

Fields ▾   …

Group Leader(s): None (Edit)

| Filter |
| Last Interaction Report |
| Edit Group |
| Add Individuals to this Group |
| Activate |
| Inactivate |
| Add to Group |
| Move to Group |

Active/Inactive Group Individuals

◯ Show Active Individuals
⦿ Show Inactive Individuals
◯ Show All Individuals

	First Name	**Last Name**	**Group Last Attended Date**	**Active?**	**Join Date**
☐	Harvey	Ingram	12/09/2018	N	08/28/2016

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Group Join Dates with Workflows

The Join date is used with Workflows to automate the Group Duration trigger …

- Use an Interaction to follow-up with a first-time visitor.

- Send an email or notification someone has been in the visitor group for 51 weeks. *(Good possibility this person needs to be removed.)*

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Workflows to add or remove to/from Groups

- Add someone to the Visitor or Prospect Group and the Workflow automatically adds them to other Groups, such as Worship Attendance, Newsletter, etc.

How to use Leader Roles with Groups

- Allow Group Leaders to see phone numbers, email, etc.

- Take attendance using the ShelbyNext Membership App.

- Start with Permissions and assign the rights to the Group Leaders. You must also assign which groups fall under these rights.

- Assign the Group Leader(s) to the Group.

- Provide Group Leaders with their username and password along with how to access the ShelbyNext Membership app.

Online Directory

- The Online Directory uses <u>*only one*</u> Group to contain those who are in the online directory.

- Suggest you Create a unique Group since not everyone who is a member, for example, wants to be in the directory. There are those who aren't members who should be in the directory such as church staff, teachers, etc.

- For the Group Settings, just provide a Name (ex. Online Directory) and check the box "Allow Individuals to Know They're Members".

- In Permissions, Enable the Directory, Choose the Directory Group, and what fields will be Visible to All people in the Directory.

- Visible in the free MinistryOne and ShelbyNext Membership apps.

- Profile Visibility on the Person's page to hide information they don't Groups Leaders or Members to see.

Name

Online Church Directory

☑ Allow Individuals To Know They're Members
Check if you wish for members to know they are in this Group.

Enable Directory?

Yes ⌄

Directory Group

Online Church Directory ⌄

Visible Fields for Directory Viewers

☑ Email Address
☑ Address
☑ Home Phone
☑ Cell Phone
☑ Profile Photo
☐ Birthday
☐ Age
☑ Family Tree

Save
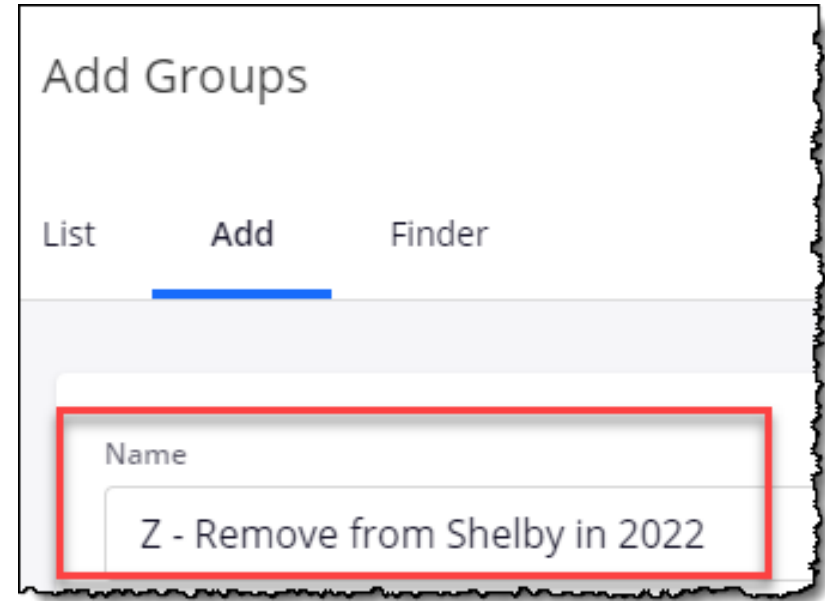
Group as a Class Directory

Allow Individuals To Know They're Members
Check if you wish for members to know they are in this Group.

Allow Members And Leaders Of This Group To View Other Active Members Of The Group
Check if you wish for Group members to see other members of the Group.
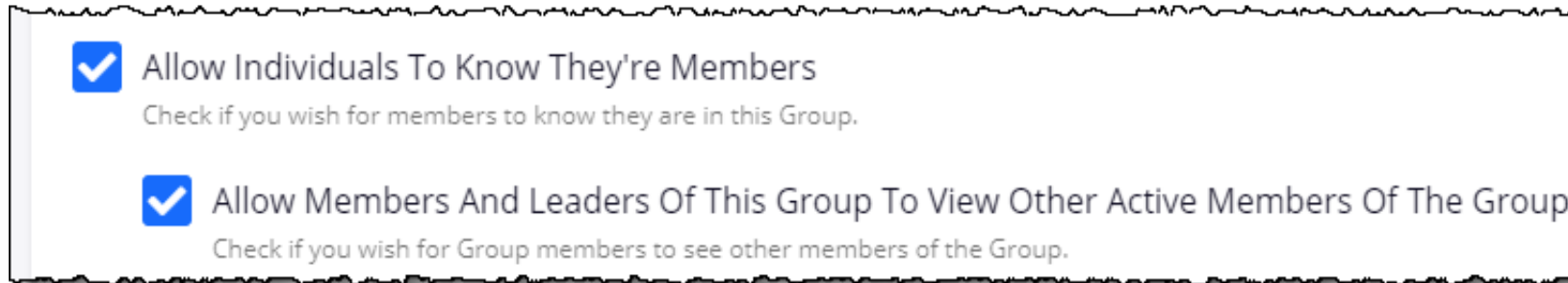
- Small Groups, Committees, Leadership may want the phone numbers, email or mailing addresses of those in their groups.

- This information, *when activated*, is visible to the Group members.

- There is an option on the members page, Profile Visibility, that can hide information the individuals don't want shown in the Group or Online Directory.

- No confidential information such as interactions, notes, or giving is visible. Just demographic information.

- Profile Visibility on the Person's page to hide information they don't Groups Leaders or Members to see.

- Click on Edit Group and check the boxes "Allow Individuals to Know They're Members" and "Allow Members and Leaders of This Group to View Other Active Members of The Group".

Temporary or Maintenance Groups

- Sometimes you just need a Group for a Short-term project such as a mailing for an event.

- Or you need a Group to contain those who need to be Removed from Shelby following annual statements or conference reports being completed.

- Create names that keep these groups out of the way of your everyday ministry. You can use a prefix for the Group such as Z. Ex. "Z – Remove from Shelby in 2022" or "Z – Charge Conference Review."

- You can also use a person's initials or the Group Leader role to show who is responsible for the Group.

Add Groups

List   Add   Finder

Name

Z - Remove from Shelby in 2022

Using a Group to Remove people from Shelby

- An Admin inherits the right to remove people from Shelby within a Group.

- If you need to give this right to an individual who is not an admin, they will need the permission to Delete Individuals.

- To remove one or more individuals from the ShelbyNext database...

  - Click on the Group name.

  - Select those who are to be removed.

  - Click the action button and choose Delete Individuals From System at the bottom of the menu. *Only those with permissions will see this option.*

  - The following message will appear. Click OK.

  - Click the red Delete button.

Individuals   Select all

☑ View
☑ Add/Edit
☐ Import
☐ Propose Edit
☑ Delete
☑ Merge

Fields ▾   ...
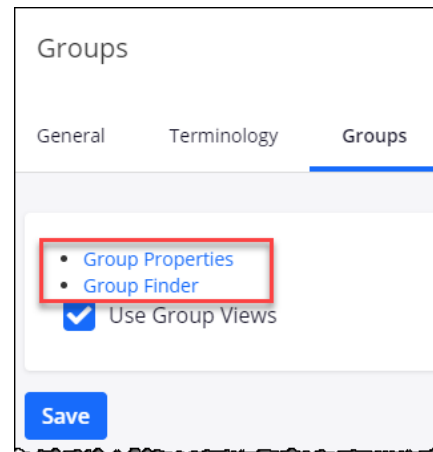
Filter

Last Interaction Report

Edit Group

Assign/Log Interaction

Delete Individuals From System

This will remove the selected people and all of their information from the system. Their giving will be marked as anonymous. There is NO undo.

OK

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Group Finder Settings

- Group Finder helps your members and attenders "find" groups they would like to join.

- It uses Group Properties to determine which Groups will appear in Group Finder.

- Notice there is an Embed code that will allow access to Group Finder from your website.

- Group Finder also works in the MinistryOne app.

Groups

General   Terminology   **Groups**

- Group Properties
- Group Finder
- [✓] Use Group Views
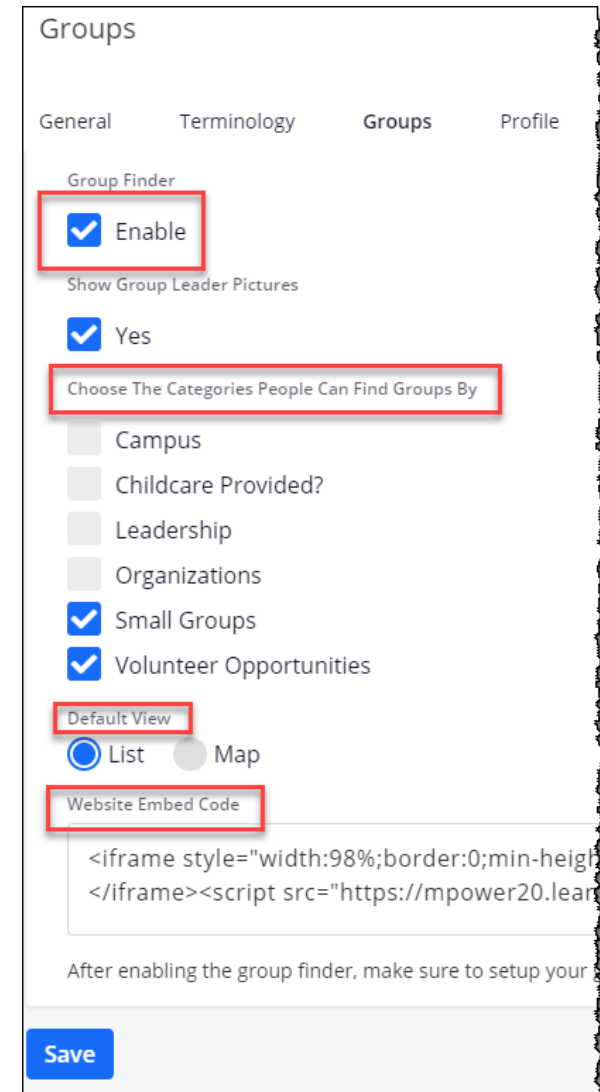
Save

Groups

General   Terminology   **Groups**   Profile

Group Finder

[✓] Enable

Show Group Leader Pictures

[✓] Yes

Choose The Categories People Can Find Groups By

- [ ] Campus
- [ ] Childcare Provided?
- [ ] Leadership
- [ ] Organizations
- [✓] Small Groups
- [✓] Volunteer Opportunities

Default View

(●) List   ( ) Map

Website Embed Code

```
<iframe style="width:98%;border:0;min-heigh
</iframe><script src="https://mpower20.lear
```

After enabling the group finder, make sure to setup your

Save

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Group Finder Properties Setup

Childcare Provided?

| No | ⊗ | Yes | ⊗ |

Add Property [   ] **Save**   Edit

Small Groups

| Men's | ⊗ | Seniors | ⊗ | Women's | ⊗ | Young Couples (18 to 29) ⊗ | Youth | ⊗ |

Add Property [   ] **Save**   Edit

Volunteer Opportunities

| Children's Ministry | ⊗ | Youth | ⊗ |

- Create the Properties you will want to use with Group Finder.
- Suggestions would be Properties for the type of Group, Age Groups, Childcare Provided?, etc.

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Group Finder Group Setup

Name

Small Groups - Power Tools

Choose Leader(s)

**Leader Role permissions are set up for leaders of this Group

Search...

Current Leader(s)

Billy Adams ⊗

- Add your Group and assign the Group Leader(s).
- The Group Leaders will be notified by email to either accept/deny an individual who wants to join or that an individual has joined, depending on the settings.

Group Finder Group Setup

- Enter the Group Description. This is what potential Group members will see to know if this is a good fit for them.

- Address where the Group meets.

- Meeting Day and Time.

- Group Properties

Description

| B | I | ≣ ≣ | ⊞ ⊞ | Format ▼ | Source |

It's imperative to have the tools of prayer (1 John 5:14), daily input from God (Matthew 6:11) and accountability (1 John 4:4-5) to live victoriously.

Men's weekly bible study.

Meet at Jake's Coffee Shop on Main St. at 6:30 a.m. every Tuesday.

Good food and fellowship while studying the Word of God.

Address

Jake's Coffee Shop
123 Main St.

Used on the Group finder

City

Cordova

State

TN

Zip Code

38016

Meeting Day

Tuesday
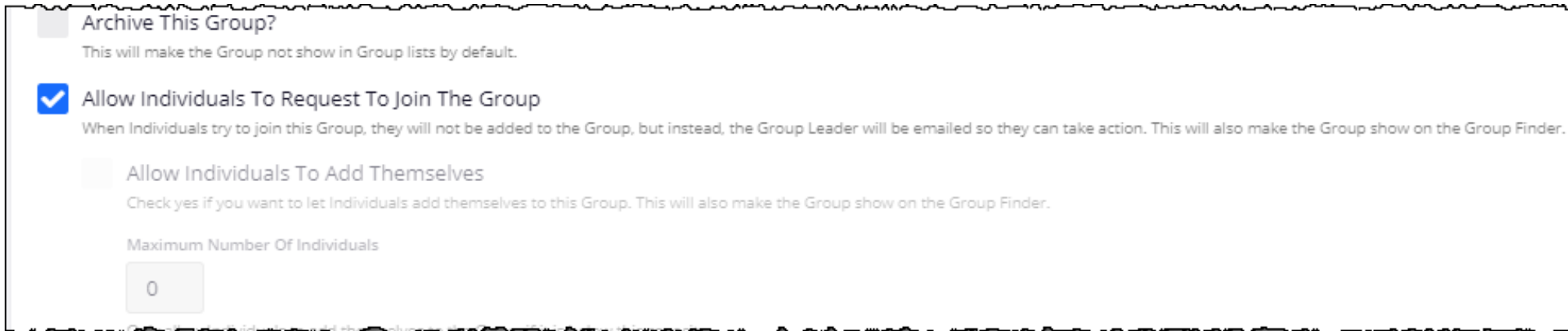
Time

6:30 AM

Properties:

Organizations: Small Groups; **Small Groups:** Men's [Edit]

Group Finder Group Setup

Archive This Group?
This will make the Group not show in Group lists by default.

☑ Allow Individuals To Request To Join The Group
When Individuals try to join this Group, they will not be added to the Group, but instead, the Group Leader will be emailed so they can take action. This will also make the Group show on the Group Finder.

Allow Individuals To Add Themselves
Check yes if you want to let Individuals add themselves to this Group. This will also make the Group show on the Group Finder.

Maximum Number Of Individuals

0

- Check the box either to Allow Individuals to Request to Join the Group OR Allow individuals to Add Themselves.

- Note there is a Maximum Number of Individuals option if you allow people to add themselves.

Group Finder Results

Find A Group

Any Organizations ⌄	Any Small Groups ⌄
Any Volunteer Opportunities ⌄	Any Meeting Day ⌄
Any Meeting Time ⌄	Find Groups Close To You
	Enter your full address

[View Map]

Group	Details	
Children's Sunday School Teacher What is expected of a chidren's ss teacher...	**Day**: Sunday **Time**: **Volunteer Opportunities**: Children's Ministry	[Join]
Small Groups - Financial Peace University **Financial Peace University** (by Dave Ramsey) *Learn how to make your money work for you!* Thursday Classes at 7pm (January 28th - March 25th) Enrollment: $110 per household **Meets At** 7345 Goodlett Farms Pkwy. Cordova, TN 38016	**Leader(s):** George Adams Juliet Adams **Day**: Thursday **Time**: 7:00 PM **Organizations**: Small Groups **Small Groups**: Young Couples (18 to 29)	[Join]
Small Groups - Power Tools It's imperative to have the tools of prayer (1 John 5:14), daily input from God (Matthew 6:11) and accountability (1 John 4:4-5) to live victoriously. Men's weekly bible study. Meet at Jake's Coffee Shop on Main St. at 6:30 a.m. every Tuesday. Good food and fellowship while studying the Word of God. **Meets At** Jake's Coffee Shop 123 Main St. Cordova, TN 38016	**Leader(s):** Billy Adams **Day**: Tuesday **Time**: 6:30 AM **Organizations**: Small Groups **Small Groups**: Men's	[Join]

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Using Field List with Groups

- Useful to see email, phone numbers on individuals.

- Use for promotions based on birthdate or age.

- Click Fields and check the boxes of the fields you want to see on the screen.

Individuals in Sunday School - Preschool - Nursey Bed Babies Class

Group Information   Group Activity

Group Leader(s): None (Edit)

Fields ▾ ...

	First Name	Last Name	Birth Date	Age	Active?
	Howard	Anderson	10/20/2018	2 yrs	Y
	Joey	Ford	04/19/2017	4 yrs	Y
	Juanita	Gutierrez	12/27/2016	4 yrs	Y
	Natalie	Jacobs	04/11/2017	4 yrs	Y
	Jimmy	Jones III	04/14/2017	4 yrs	Y
	Andrew	Knibbs	01/16/2017	4 yrs	Y
	Brittany	Knibbs	05/09/2017	4 yrs	Y
	Cedrick	Laporte Jr.	05/23/2017	4 yrs	Y
	Raymond	Togo	05/14/2017	4 yrs	Y

Residential Country
Mailing Address
Mailing City
Mailing State
Mailing Zip Code
Mailing Country
☑ Birth Date
☑ Age
Family Relationship
Check-In Note
Baptism Date
Died On

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Deleting Groups and the Consequences

- Any attendance history associated with a Group that is deleted will be lost.

- Group Join dates will be lost.

- The Group is removed from all records, Views, Queries, Filters, that referenced the Group.

- People will NOT be removed when the Group is deleted.

When not to use Groups

- Don't use Groups to store important dates such as....

  - Birthdates, Join the Church, When someone died, etc.

  - Instead, use a Configurable Date Field.

    - Birthdate, Date Died, and Baptism Dates are already setup.

- Use Groups ONLY as a filter for "omitting" someone from lists, saved searches, etc.

- Parent Groups are NOT necessary for Mass Contact

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Promotions

[Promotion Checklist](#)

Naming Conventions for School Age Groups, Committees, etc.

- **Traditional Sunday School Class Names**
  - SS 3rd Grade Boys, Youth - 9th and 10th Grade, Nursery - 2 and 3 Year Olds
- **Alternatives**
  - SS Class of 2030 - Boys, Youth – All High School, Nursery – Born 2018 and 2019

- **Traditional Committee Names**
  - Vestry Members, Board Members, etc.
- **Alternative**
  - Board 19-20, Board 20-21, Board 21-22, Board 22-23

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Next "Advance Your Knowledge" Webinar

- Topic: Purpose Driven Forms – Part 1 (Getting Ready for Fall)

- Date: August 11, 2021

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

- Led by: Mark Crain and Staci Sampson

- We will look at using some of the powerful tools in the Forms Management System to create Forms needed for lining up volunteers, setting up classes, or allowing members to send in information for a new pledge. Join us as we unlock some of the ways you can collect and import information from members as you involve them in the ministry of the church.

Virtual Workshops are here!

- Enrollment is now open for August 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

Download the Promotions Checklist

Community.ShelbySystems.com

Virtual Training

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