

Ministry Brands®



Ministry Brands®

Unify Church Operations with an Integrated ChMS and Giving Solution

MARCH 29, 2023



Today's Speakers



Jeannetta Douglas

Customer Success



Kristen Foster

Giving Success

Agenda



1. Donor Experience
2. Benefits of an Integrated Solution
3. Simplified Switching
4. New Features Coming Soon

Donor Experience



Make Giving Native

Embedded Form Options

Donors need to feel safe and connected when they give. You don't have to redirect a giver or registrant to another site to give, then hope they come back to learn more. Make that same safe giving experience part of your website.



A MOVEMENT OF EVERY DAY GENEROSITY

It's amazing to see God's creativity, love, and generosity on full display each and every day. Our church family generously give their time, service, talents, and treasures through so many acts of worship, and we invite you to join us in our movement of every day generosity!

Whether it be rocking out with our worship teams, donating and transporting goods to the shelters, serving with volunteer teams on the weekend, using text-to-give, or dropping some dollars into the giving bucket. Each and every act of generosity matters and helps change the lives of others. Everyone's gifts and service are acts of worship that truly bring us all closer to our Creator!



South Campus Giving

One-time

Recurring

Fund

\$ Amount

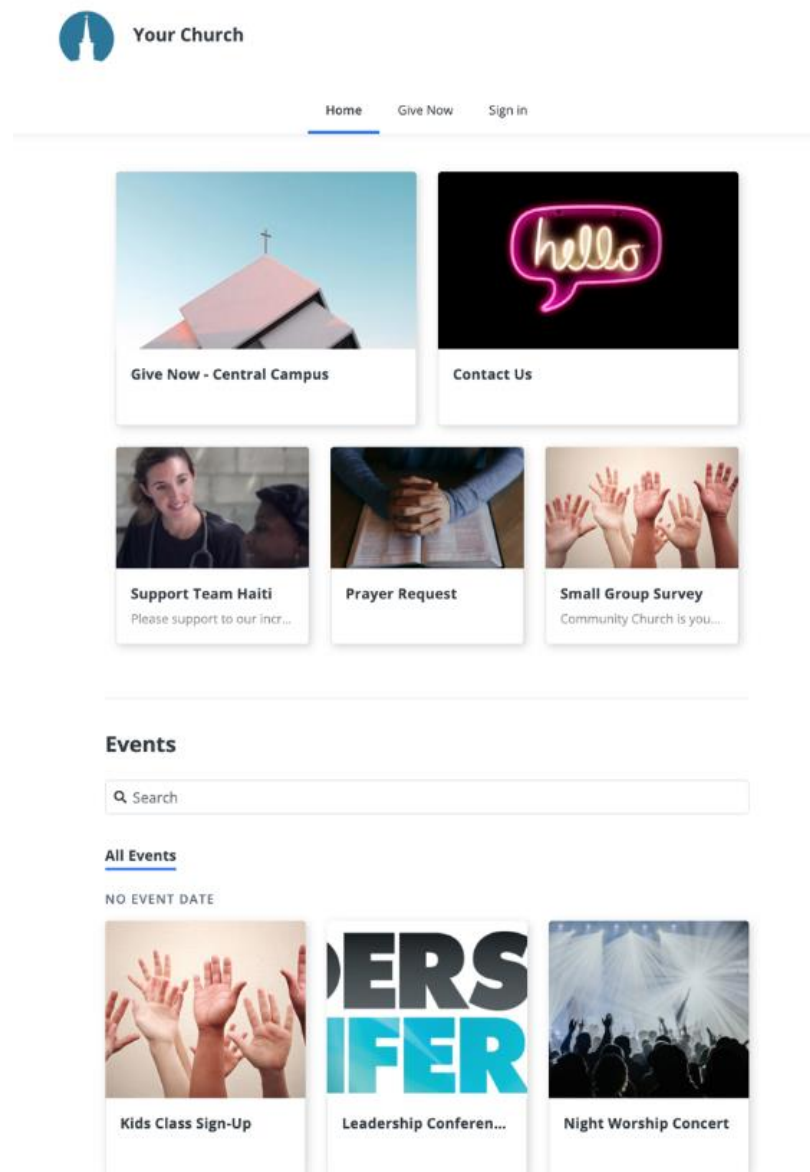
+ Add Donation

Submit!

Home Page

Encourage Engagement

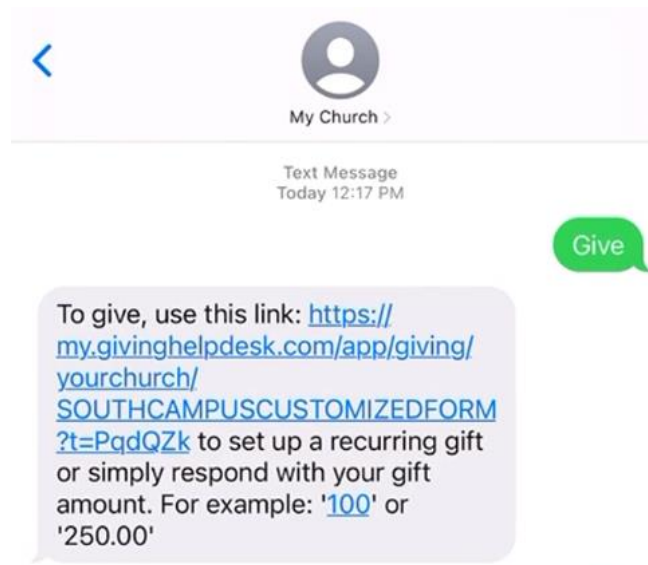
Imagine, all your forms in one place to be easily found by those you serve. Your custom forms can be displayed in a unique Home Page layout – with or without an organization website.



Giving in the Moment

Inspire your audience to take action

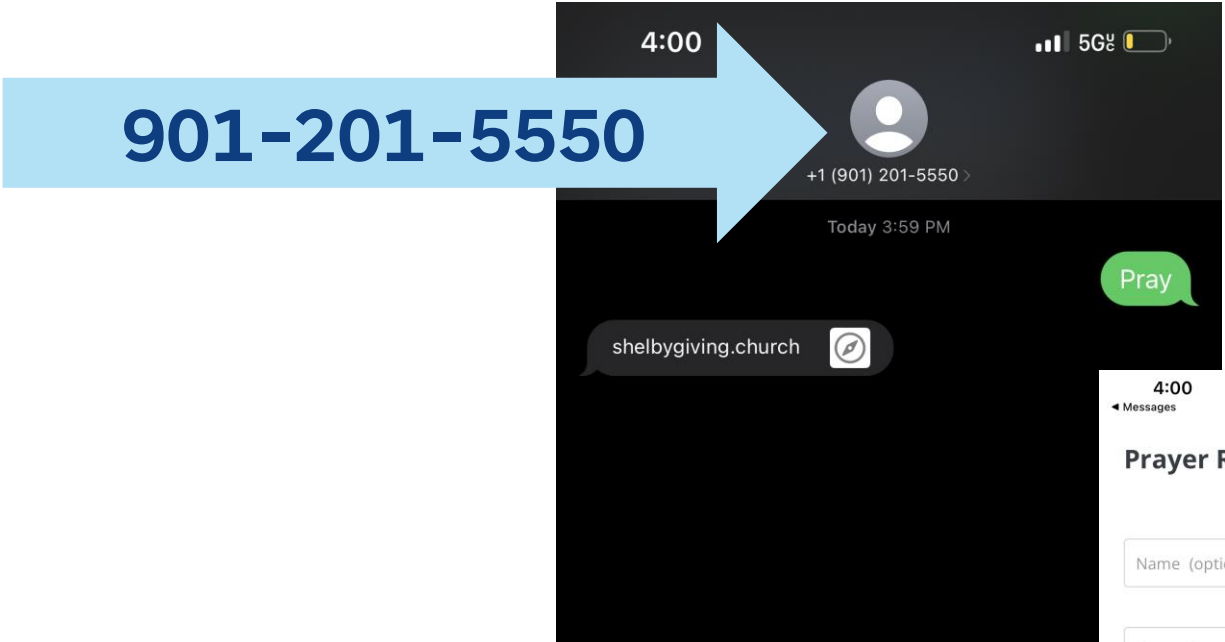
Don't leave engaging donors, members and participants to the chance that they will remember to go to the website later or after service to give. Make it easy to give when they are inspired.



Instant Engagement

Inspire your audience to take action

Don't leave donors, members and participants to the chance that they will remember to go to the website later or after service to engage with your ministry.



Form Keywords +

Donors can text a keyword to a number or short code and receive a link to the form associated with that keyword.

Form Title	Keyword	
Growing Into Destiny	Destiny	⋮
Contact Us	Contact	⋮
Prayer Request	Pray	⋮
TX Ministry Conference	Shelby	⋮

4:00

Messages

Prayer Request

Name (optional)

Prayer Request

Would You Like Someone From The Team To Contact You?

Yes

No

Is this confidential (optional)

Yes

No

Send Request

AA

shelbygiving.com

<

>

🔗

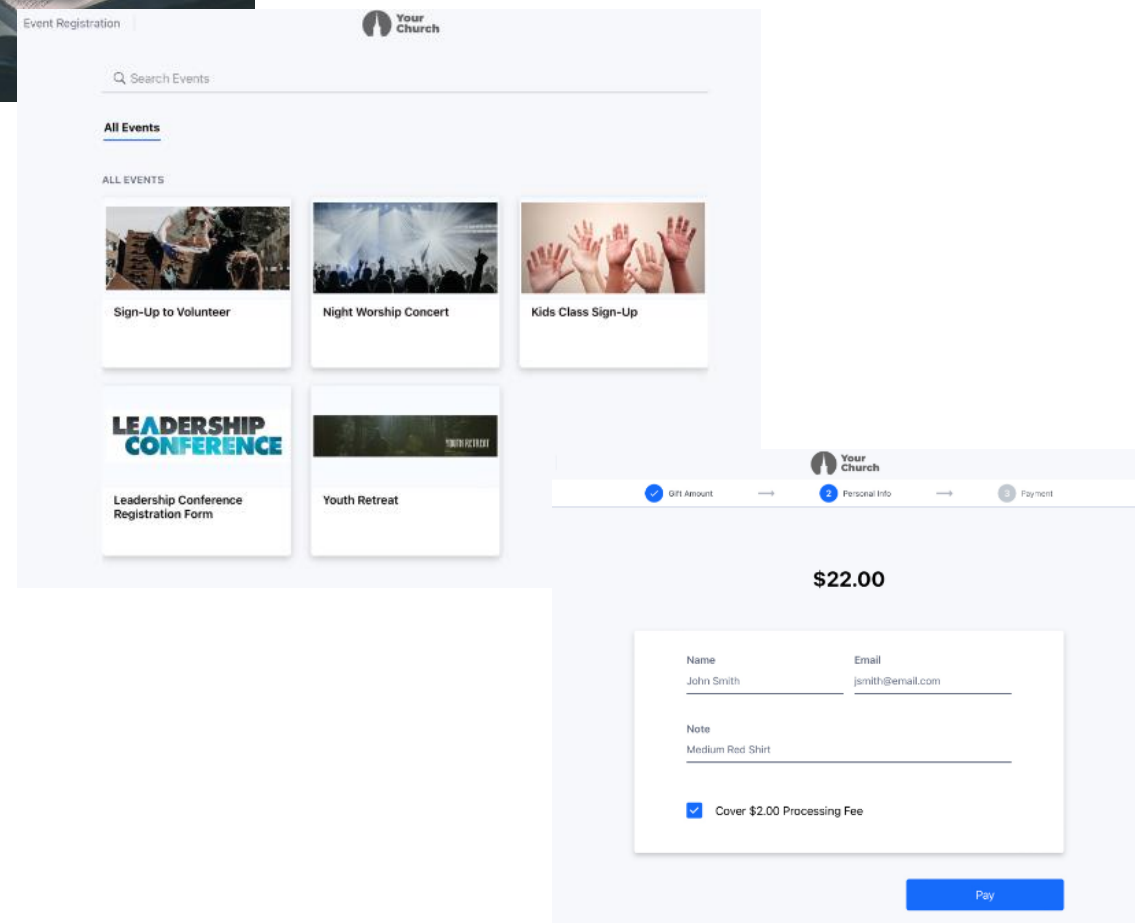
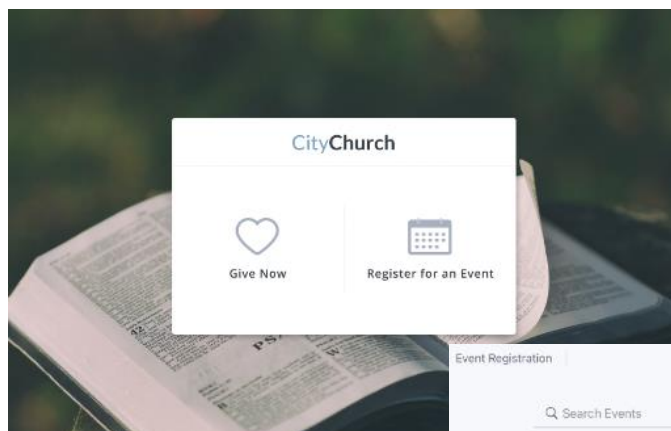
🔖

📄

In-Person Option

Flexibility of Kiosk Functions

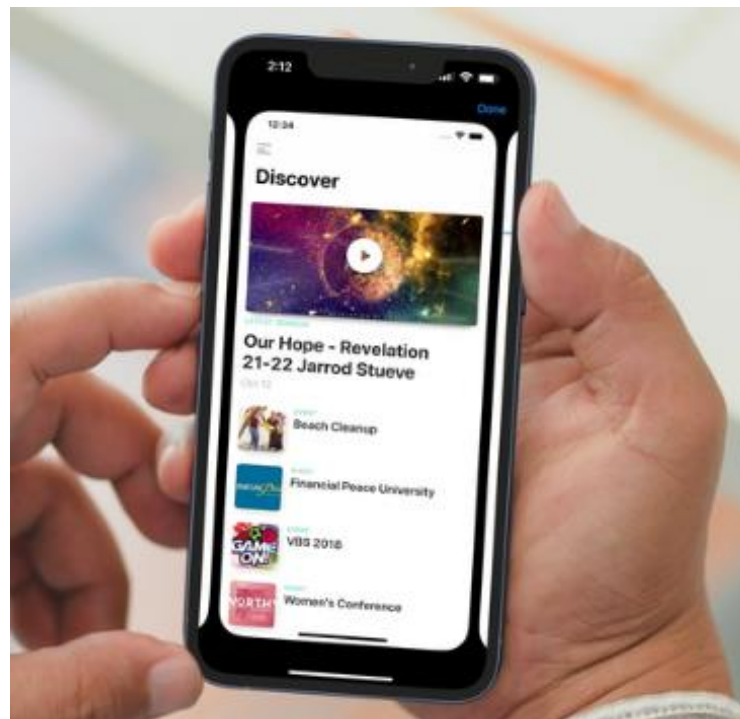
Make it easier than ever for people to give or register for events in person with kiosks. Our kiosk app and card readers make for a great experience that you can create right in your lobby!



Stay Connected

User Friendly MinistryOne Mobile App

Give your people the opportunity to Stay Connected to your ministry by utilizing our Mobile App. IT is including in your online giving platform!



View Video or
Podcast Content

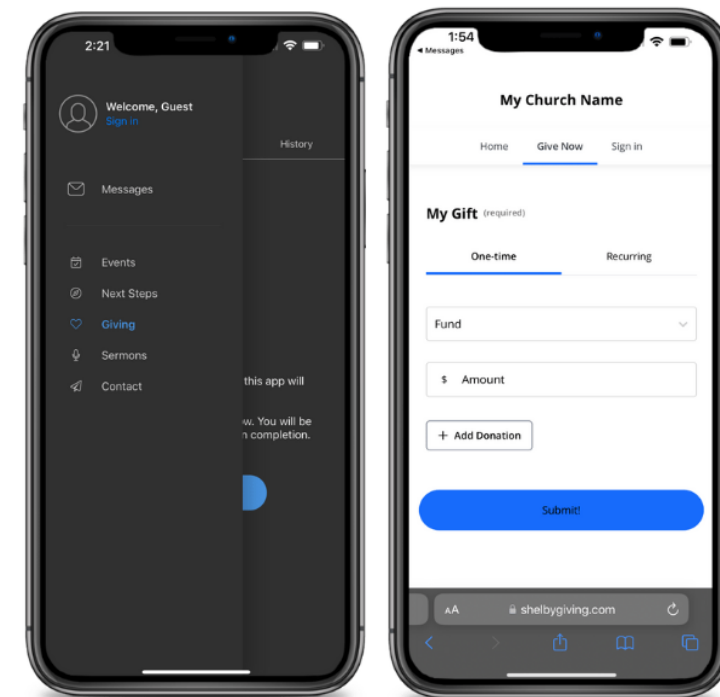
Digital Directory

Children's Check In

Give

Register for Events

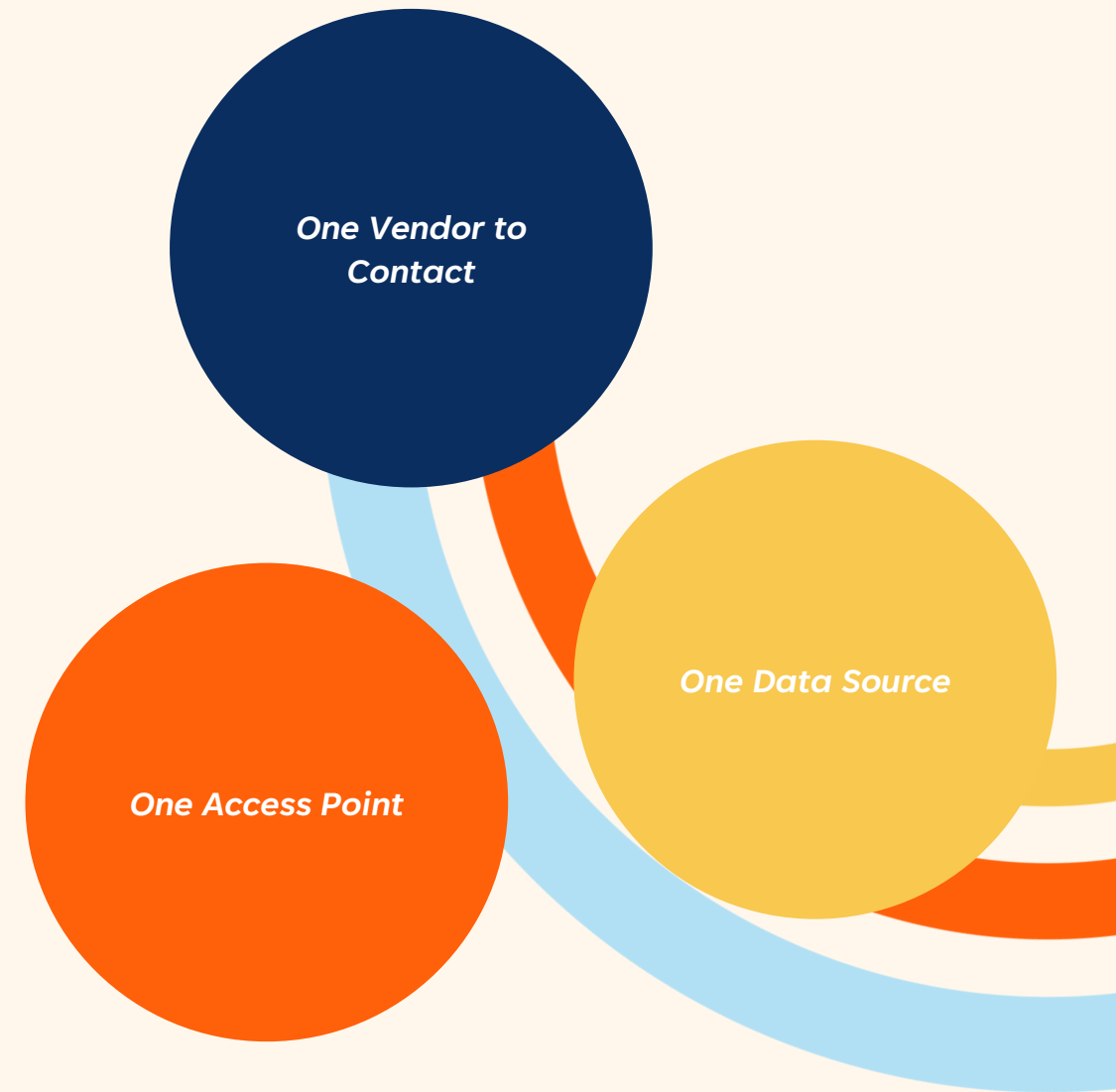
View Ministry Calendar



Ministry Brands®

Centralization

All Roads Lead to One Place



Benefits of Integration



- **Reduce Opportunity for Errors**



- **Reduce Opportunity for Errors**
- **Clear Accounting Trail**



- **Reduce Opportunity for Errors**
- **Clear Accounting Trail**
- **Ease of Reconciliation**



- **Reduce Opportunity for Errors**
- **Clear Accounting Trail**
- **Ease of Reconciliation**
- **Save Time and Money**



The Power of Integration



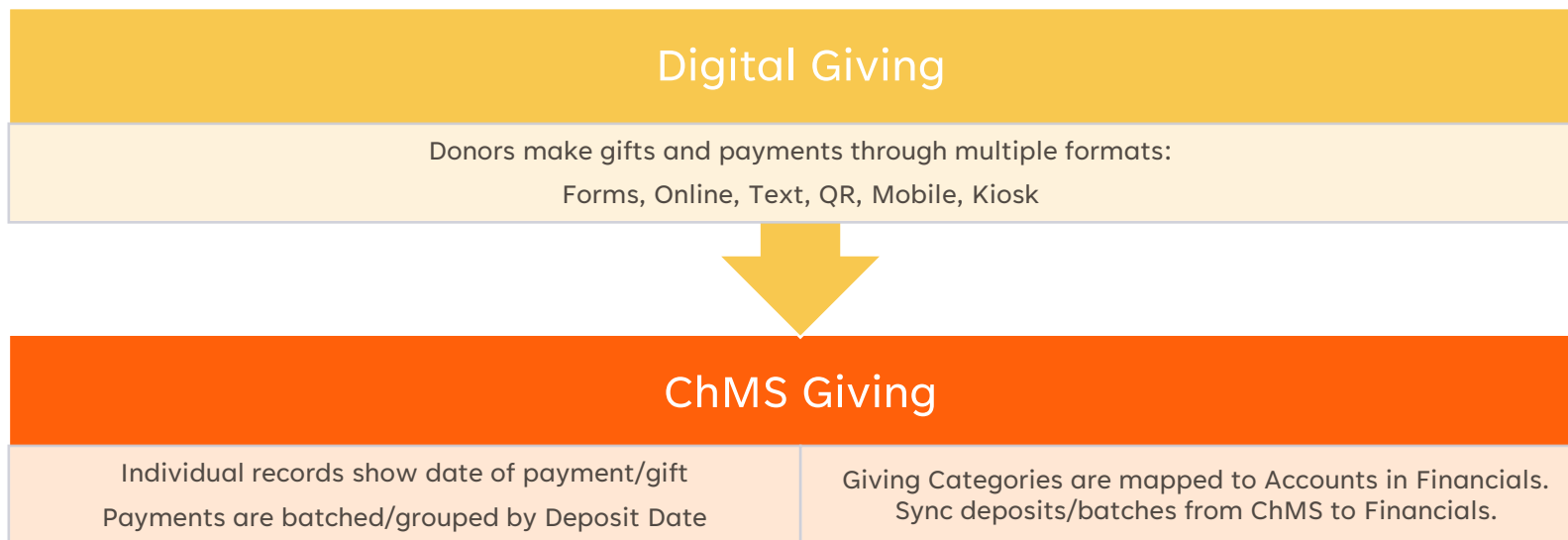
Power of Integration

Digital Giving

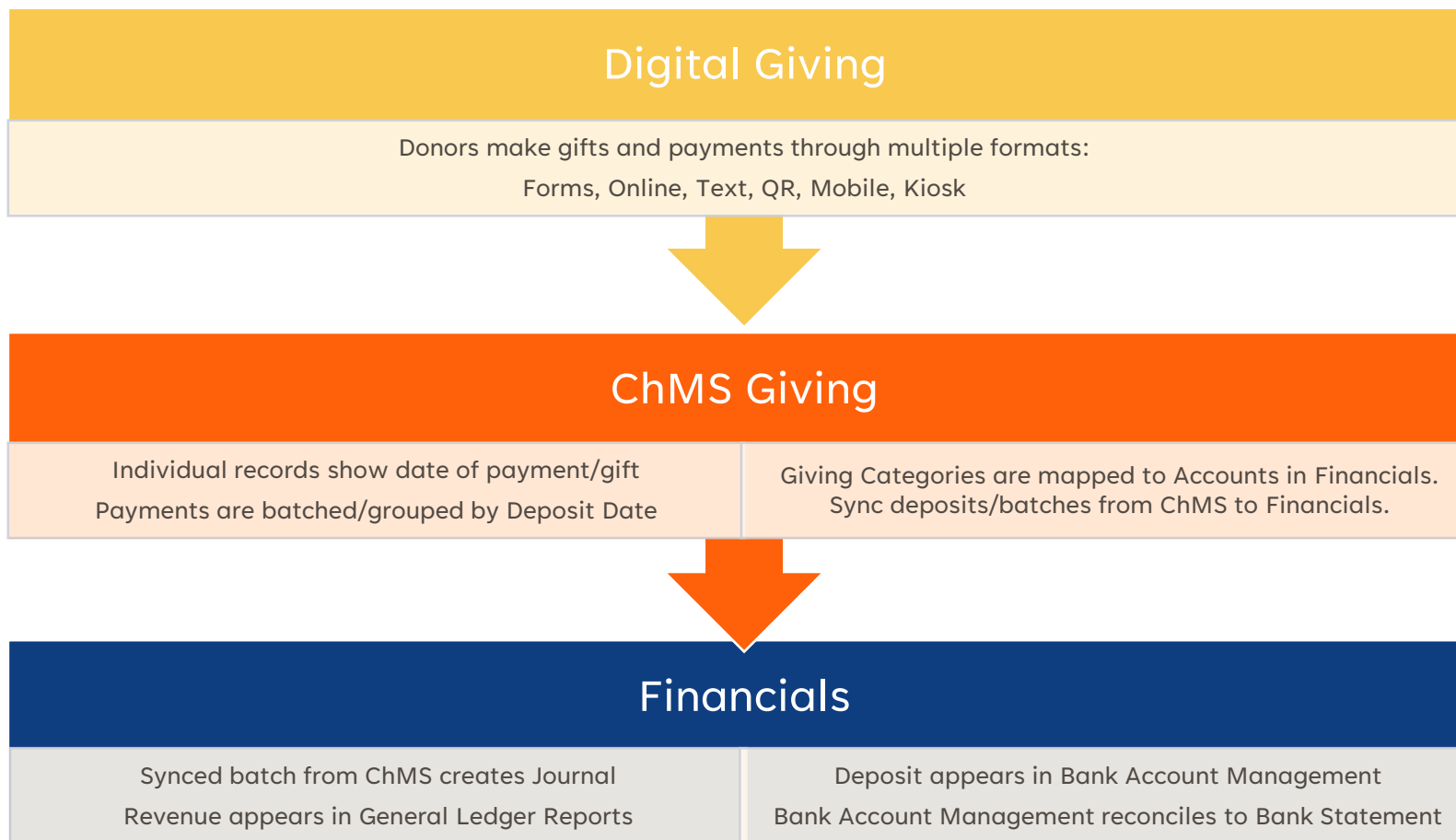
Donors make gifts and payments through multiple formats:
Forms, Website, Text, QR, Mobile, Kiosk



Power of Integration



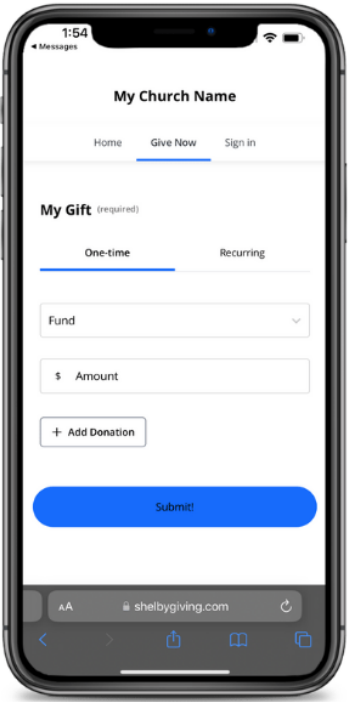
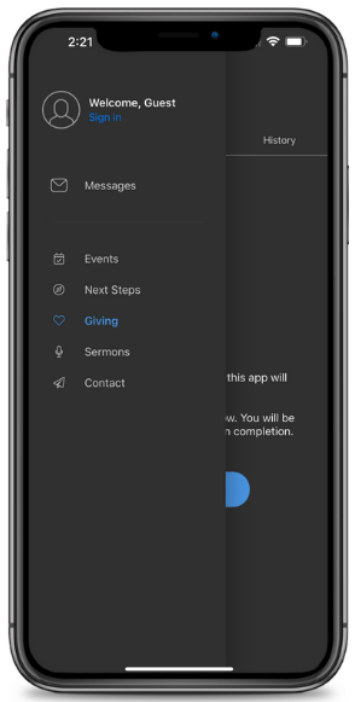
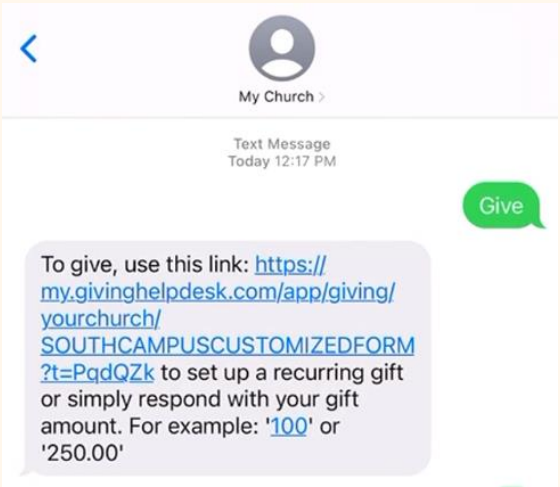
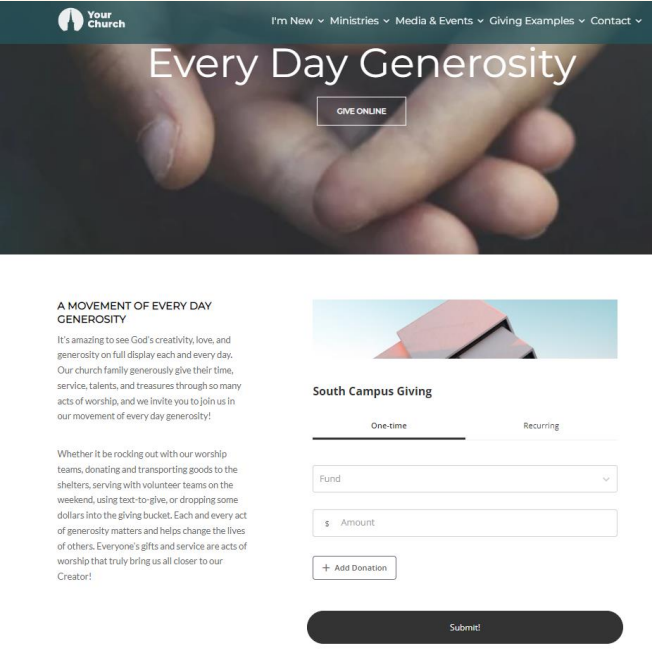
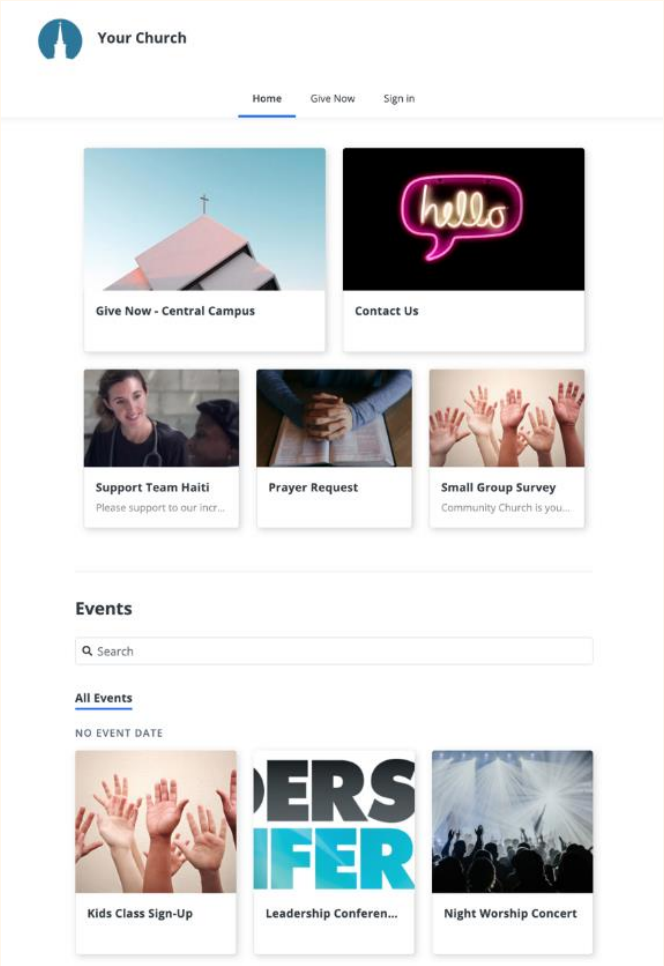
Power of Integration



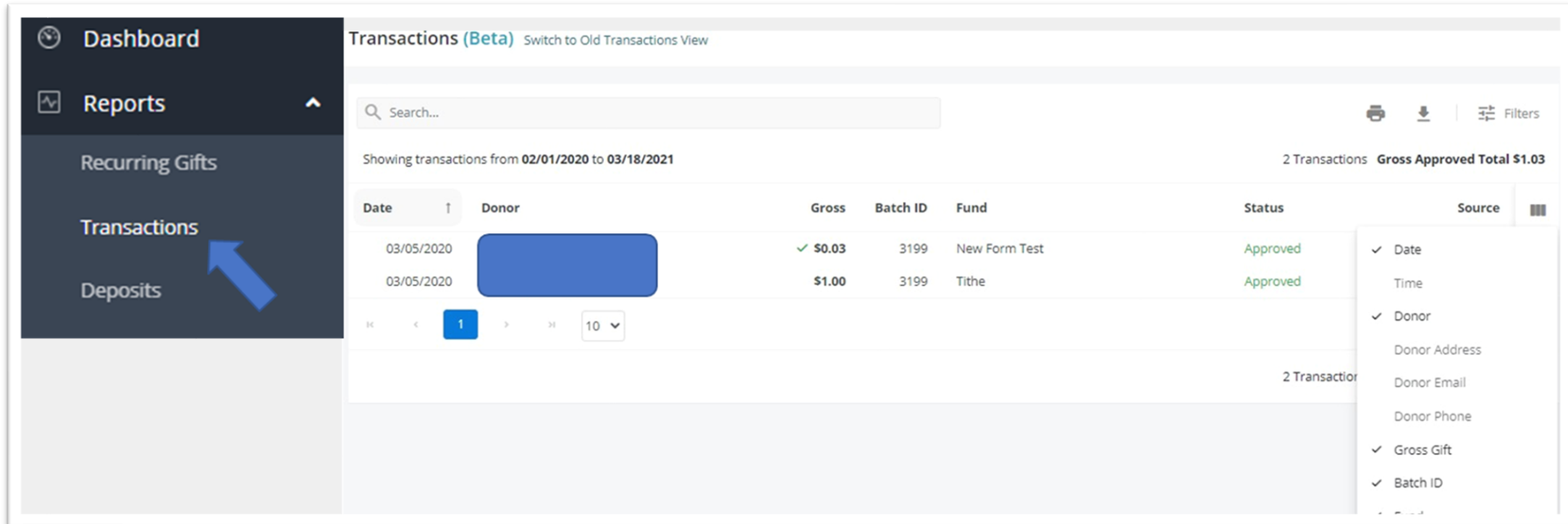
The Transaction Journey



Ministry Brands®



Online Giving Reporting - Transactions and Deposits



The screenshot displays the 'Transactions (Beta)' interface. The left sidebar contains links for Dashboard, Reports, Recurring Gifts, Transactions (highlighted with a blue arrow), and Deposits. The main content area shows a table of transactions with columns: Date, Donor, Gross, Batch ID, Fund, Status, and Source. The table displays two transactions from 02/01/2020 to 03/18/2021. A search bar and filters are at the top right. A dropdown menu is open on the right side of the table.

Transactions (Beta) [Switch to Old Transactions View](#)

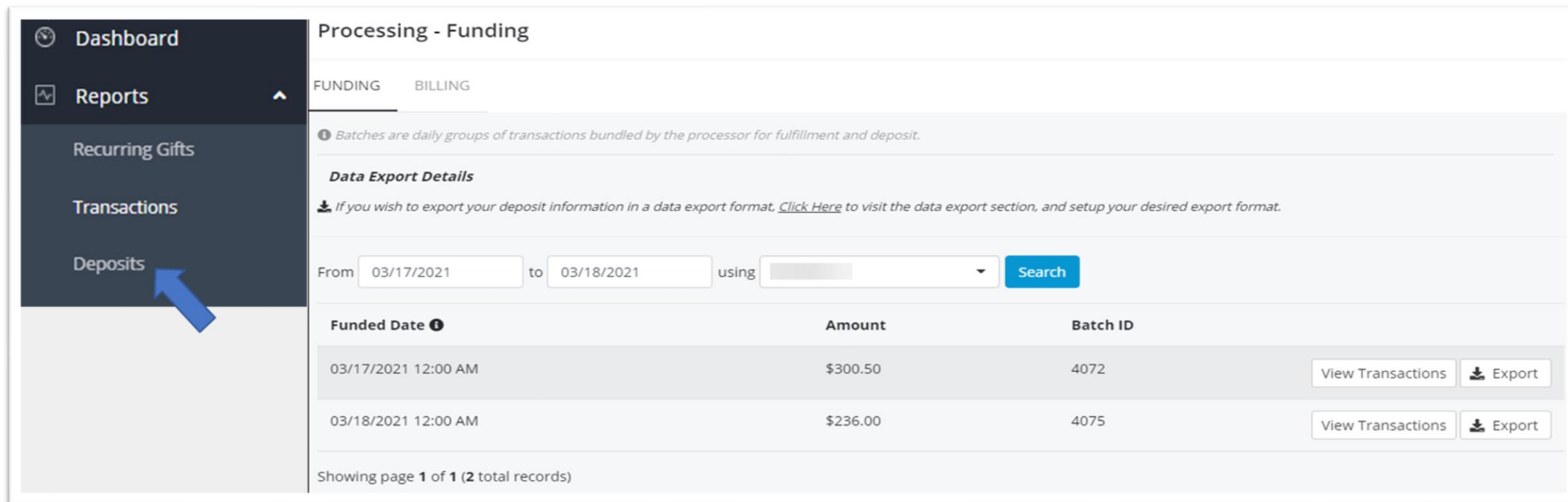
Showing transactions from 02/01/2020 to 03/18/2021 2 Transactions Gross Approved Total \$1.03

Date	Donor	Gross	Batch ID	Fund	Status	Source
03/05/2020	[Redacted]	✓ \$0.03	3199	New Form Test	Approved	
03/05/2020	[Redacted]	\$1.00	3199	Tithe	Approved	

2 Transaction

- ✓ Date
- Time
- ✓ Donor
- Donor Address
- Donor Email
- Donor Phone
- ✓ Gross Gift
- ✓ Batch ID

Online Giving Reporting - Transactions and Deposits



Processing - Funding

FUNDING BILLING

Batches are daily groups of transactions bundled by the processor for fulfillment and deposit.

Data Export Details

If you wish to export your deposit information in a data export format, [Click Here](#) to visit the data export section, and setup your desired export format.

From to using

Funded Date ⓘ	Amount	Batch ID	
03/17/2021 12:00 AM	\$300.50	4072	<input type="button" value="View Transactions"/> <input type="button" value="Export"/>
03/18/2021 12:00 AM	\$236.00	4075	<input type="button" value="View Transactions"/> <input type="button" value="Export"/>

Showing page 1 of 1 (2 total records)

- Deposit Transmission Date Driven
- Syncs to ChMS Giving Batches with name "Online Giving Batch #XXXX"
- Can be downloaded
- Can view detail of all gifts/transactions included in the deposit by using the "View Transactions" Button

Giving - Deposit Batch Detail

Transactions (beta) [Switch to Old Transactions view](#)

Search...

Showing transactions from batch **4072** for deposit account [REDACTED]

7 Transactions **Net Approved Total \$300.50**



Date	Donor	Gross	Fee	Net	Batch ID	Fund	Status	Source
03/15/2021	[REDACTED]	\$20.00	\$0.00	\$20.00	4072	OCC Fund	Approved	ACH
03/15/2021	[REDACTED]	✓ \$0.50	\$0.00	\$0.50	4072	Tithe	Approved	ACH
03/15/2021	[REDACTED]	\$100.00	\$0.00	\$100.00	4072	Tithe	Approved	ACH
03/15/2021	[REDACTED]	✓ \$2.50	\$0.00	\$2.50	4072	Tithe	Approved	ACH
03/15/2021	[REDACTED]	\$75.00	\$0.00	\$75.00	4072	Tithe	Approved	MasterCard
03/15/2021	[REDACTED]	\$100.00	\$0.00	\$100.00	4072	Tithe	Approved	MasterCard
03/15/2021	[REDACTED]	✓ \$2.50	\$0.00	\$2.50	4072	Tithe	Approved	MasterCard

« < 1 > » 10 ▾




1-7 of 7 Records


7 Transactions **Net Approved Total \$300.50**

ChMS - Batches vs. Giving History

Batch Report 46 Batches  

3 Months Ago And Current

ID	Name	Created	By	Date Received	Expected Total	Synced To Financials	
292	Online Giving Batch # 4075	03/18/2021	Admin	03/17/2021	\$236.00	No	
290	Online Giving Batch # 4072	03/17/2021	Admin	03/16/2021	\$300.50	No	
291	Sunday Offering	03/17/2021		03/14/2021	\$9,708.00	Yes	



- Payments are batched by deposit
- The Batch Report tab indicates which batches have or have not been Synced to the Financials

ChMS - Batches vs. Giving History

Overview Summary Detail By Anonymous **Batches** Pledges Demographics

Created by on 03/17/2021 12:41pm

First Name	Last Name	Category	Note	Source	Date	Check Number	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		OCC Fund		Online Giving	03/15/2021	0	\$20.00 Edit
		Tithes & Offerings		Online Giving	03/15/2021	0	\$0.50 Edit

Edit Batch
+ Copy Batch
Delete Batch
Sync to Financials
Print
Deposit Slip
Check Images

Amount given toward pledged: \$0.00
Not given toward pledged: \$300.50

• Tithes & Offerings: \$280.50
• OCC Fund: \$20.00
Total: \$300.50

Financials - Syncing

There are 7 entries ready to be sent from the 1 batch selected.

- 7 Contribution Entries

Journal Date *

03/16/2021

The date the journal will be shown to post for.

Company

Year

Period



2021


3 March


Sync






Financials - Unposted Journal

[Home](#) > [General Ledger](#) > [Unposted Journals](#)

  [Add To My Tasks](#)

Filters 

[Add New Journal](#) View All  [Import Journals](#)

<input checked="" type="checkbox"/>	Type	Journal #	Date	Period	User	Description	Amount	Note	Attach	Pending?	Setup
<input checked="" type="checkbox"/>	  CN	45	3/16/2021	March		CN Entries	\$300.50				
1 entries							\$300.50				

Journal Edit Report

Change Year

Post Journals



Clear & Transparent Reporting



Giving - Deposit Batch Detail

Transactions (beta) [Switch to Old Transactions view](#)

Search...

Showing transactions from batch **4072** for deposit account [REDACTED]

7 Transactions **Net Approved Total \$300.50**

Date	Donor	Gross	Fee	Net	Batch ID	Fund	Status	Source
03/15/2021	[REDACTED]	\$20.00	\$0.00	\$20.00	4072	OCC Fund	Approved	ACH
03/15/2021	[REDACTED]	✓ \$0.50	\$0.00	\$0.50	4072	Tithe	Approved	ACH
03/15/2021	[REDACTED]	\$100.00	\$0.00	\$100.00	4072	Tithe	Approved	ACH
03/15/2021	[REDACTED]	✓ \$2.50	\$0.00	\$2.50	4072	Tithe	Approved	ACH
03/15/2021	[REDACTED]	\$75.00	\$0.00	\$75.00	4072	Tithe	Approved	MasterCard
03/15/2021	[REDACTED]	\$100.00	\$0.00	\$100.00	4072	Tithe	Approved	MasterCard
03/15/2021	[REDACTED]	✓ \$2.50	\$0.00	\$2.50	4072	Tithe	Approved	MasterCard

« < 1 > » 10 ▾

1-7 of 7 Records

7 Transactions **Net Approved Total \$300.50**

ChMS - Batch

Overview Summary Detail By Anonymous **Batches** Pledges Demographics

Created by on 03/17/2021 12:41pm

First Name	Last Name	Category	Note	Source	Date	Check Number	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		Tithes & Offerings		Online Giving	03/15/2021	0	
		OCC Fund		Online Giving	03/15/2021	0	\$20.00 Edit
		Tithes & Offerings		Online Giving	03/15/2021	0	\$0.50 Edit

Edit Batch
+ Copy Batch
Delete Batch
Sync to Financials
Print
Deposit Slip
Check Images

Amount given toward pledged: \$0.00
Not given toward pledged: \$300.50

• Tithes & Offerings: \$280.50
• OCC Fund: \$20.00
Total: \$300.50




Financials - Journal Entry

Report Preferences

Finalize Post

Cancel

1 of 1



Shelby Report

■ Period 3 March

Posting List of Journals

Company#: 1 Name:

Fiscal Year Beginning 1/1/2021

Period 3 March

	<u>Date</u>	<u>Account Numb</u>	<u>Name</u>	<u>Description/Project</u>	<u>Debit</u>	<u>Credit</u>
CN 45	3/16/2021	CN Entries				
	3/16/2021	0-10010		CN Entries	\$300.50	
	3/16/2021	10-40010	Offerings	Contribution Entries		\$280.50
	3/16/2021	700-41100	OCC Fund Inc	Contribution Entries		\$20.00
				CN 45	\$300.50	\$300.50
				Final Totals	\$300.50	\$300.50

Financials - Journal Entry

Deposit also appears in the **General Ledger Bank (Asset) Account**.

Detail Ledger Report for Period 3 March 11 2021

Account	Reference	Net	Debit	Credit	Balance
0 Balance Sheet Accounts					
10010 General Checking					
3 Accounts Payable Checks	AP 80	3/3/2021			
3 Accounts Payable Checks	AP 83	3/3/2021			
3 Accounts Payable Check Processing	CD 62	3/3/2021			
3 Accounts Payable Check Processing	CD 63	3/3/2021			
3 Net to bank	PR 13	3/3/2021			
3 Net to bank	PR 14	3/3/2021			
3 CN Entries	CN 34	3/7/2021			
3 CN Entries	CN 35	3/7/2021			
3 CN Entries	CN 36	3/7/2021			
3 CN Entries	CN 37	3/7/2021			
3 CN Entries	CN 38	3/7/2021			
3 Accounts Payable Check Processing	CD 64	3/8/2021			
3 Accounts Payable Check Processing	CD 65	3/8/2021			
3 Accounts Payable Check Processing	CD 66	3/8/2021			
3 Accounts Payable Check Processing	CD 67	3/8/2021			
3 Net to bank	PR 15	3/10/2021			
3 Accounts Payable Checks	AP 96	3/12/2021			
3 Accounts Payable Check Processing	CD 68	3/12/2021			
3 Accounts Payable Check Processing	CD 69	3/12/2021			
3 Accounts Payable Check Processing	CD 70	3/12/2021			
3 Accounts Payable Check Processing	CD 71	3/12/2021			
3 Accounts Payable Check Processing	CD 72	3/12/2021			
3 Accounts Payable Check Processing	CD 73	3/12/2021			
3 1% Maintenance Transfer	TR 9	3/12/2021			
3 CN Entries	CN 39	3/14/2021			
3 CN Entries	CN 40	3/14/2021			
3 CN Entries	CN 41	3/14/2021			
3 CN Entries	CN 42	3/14/2021			
3 Accounts Payable Check Processing	CD 74	3/15/2021			
3 Accounts Payable Check Processing	CD 75	3/15/2021			
3 Accounts Payable Check Processing	CD 76	3/15/2021			
3 Accounts Payable Check Processing	CD 77	3/15/2021			
3 Accounts Payable Checks	AP 103	3/16/2021			
3 CN Entries	CN 45	3/16/2021			
3 Accounts Payable Check Processing	CD 78	3/17/2021			
3 Accounts Payable Check Processing	CD 79	3/17/2021			
3 Net to bank	PR 16	3/17/2021			
3 Net to bank	PR 17	3/17/2021			
3 Accounts Payable Check Processing	CD 80	3/20/2021			
3 CN Entries	CN 43	3/21/2021			
3 CN Entries	CN 44	3/21/2021			
3 CN Entries	CN 46	3/21/2021			
Period Period 3 Totals:					
10010 General Checking Totals:					

Financials – Reports

...and the General Ledger **Income, Liability, or Expense** Accounts.

Detail Ledger Report for Period 3 March 2021

Account	Reference	Net	Debit	Credit	Balance
10 Tithes/Offerings/Misc Income					
40010 Offerings					
3 Contribution Entries	CN 34	3/7/2021			
3 Contribution Entries	CN 35	3/7/2021			
3 Contribution Entries	CN 36	3/7/2021			
3 Contribution Entries	CN 37	3/7/2021			
3 Contribution Entries	CN 38	3/7/2021			
3 Contribution Entries	CN 39	3/14/2021			
3 Contribution Entries	CN 40	3/14/2021			
3 Contribution Entries	CN 41	3/14/2021			
3 Contribution Entries	CN 42	3/14/2021			
3 Contribution Entries	CN 45	3/16/2021		\$280.50	
3 Contribution Entries	CN 43	3/21/2021			
3 Contribution Entries	CN 44	3/21/2021			
3 Contribution Entries	CN 46	3/21/2021			
Period Period 3 Totals:					




Financials

Bank Reconciliation

- Deposit appears in **Bank Account Management** ready to be reconciled.
- This deposit will match the deposit on the Bank Statement.

?

Show transactions through: 

Deposits

<input type="checkbox"/>	Item #	Amount	Date	Description
<input type="checkbox"/>	9000127		3/7/2021	CN Entries
<input type="checkbox"/>	9000128		3/7/2021	CN Entries
<input type="checkbox"/>	9000130		3/7/2021	CN Entries
<input type="checkbox"/>	9000131		3/7/2021	CN Entries
<input type="checkbox"/>	9000132		3/14/2021	CN Entries
<input type="checkbox"/>	9000133		3/14/2021	CN Entries
<input type="checkbox"/>	9000134		3/14/2021	CN Entries
<input type="checkbox"/>	9000135		3/14/2021	CN Entries
<input type="checkbox"/>	9000138	\$300.50	3/16/2021	CN Entries
<input type="checkbox"/>	9000136		3/21/2021	CN Entries
<input type="checkbox"/>	9000137		3/21/2021	CN Entries

Reconcile to General Ledger

Statement Period

General Ledger Balance

Outstanding Items

General Ledger Calculated Ending Balance

General Ledger Out of Balance By

Reconciled Items from after the Statement Period

More Time Saving Opportunities



Work Smarter

Create automations for greater engagement

Common time management theme of
Simplify, Automate, Delegate,
Eliminate

Ministry Workflows

List Add Log

Name

☐ Active

- ♥ Giving — Amount
- ♥ Giving — New Regular Giver
- ♥ Giving — No Longer Giving
- ♥ Pledge Creation
- 👤 Individual — Date Field
- 👥 Group — Add/Remove
- 👥 Group — Membership Duration
- ✓ Attendance
- 📄 Form Submission

+ Add Trigger

Step up Care

Create automations for greater engagement

Take member care to the next level.
No more wondering if follow-up was completed or if a visitor card got lost.

The screenshot displays the Ministry Brands automation builder interface. On the left, a sidebar contains a document icon. The main workspace is titled 'Form Submission' with a green document icon and the text 'The form is submitted.' Below this, a trigger condition is set: 'When the following form is submitted', followed by a dropdown menu labeled 'Select an Option'. A 'Map' section shows a dropdown menu with a checkmark icon, followed by the text 'to Full Name'. Below this is a link 'Map More Fields' and a section 'And match Individuals based on' with a dropdown menu labeled 'Name'. At the bottom left, there is a green button with a white plus sign and the text 'And'. On the right, a panel lists various actions: 'Email' (envelope icon), 'Group' (people icon), 'Interaction' (speech bubbles icon), 'Update Progress' (pie chart icon), 'Admin Message' (flag icon), 'SMS' (phone icon), and 'Present In Group' (checkmark icon). A green bar at the bottom right contains a white plus sign and the text '+ Add Action'.

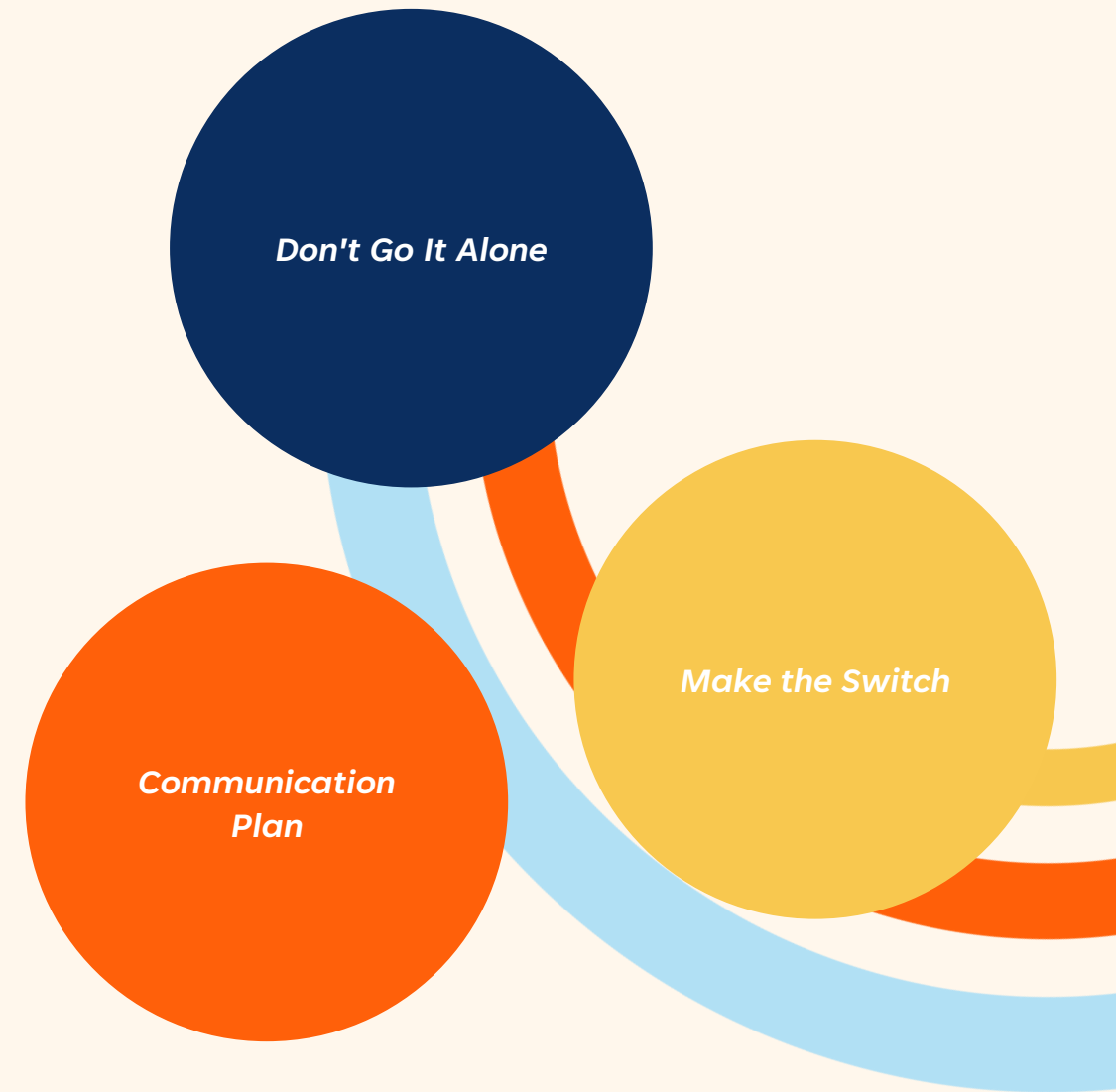
Simplified Switching



Ministry Brands®

Donor Import

Simplified Switching



Donor Import

Simplified Switching

Let's work together to create a plan to communicate the switch, collect the data needed, and make it happen seamlessly for your donors

You Never Have to Go It Alone

You will have access to your own Giving Success Coach to walk you through every step of the process of switching.

Create a Communication & Launch Plan

You will also have access to a Giving Launch Kit, stocked full of email templates, graphic inspiration, launch best practices, and more!

Hello [giver's name]!

Thank you for generously and consistently joining [ministry name] in ministry to our community.

We will be transitioning our online giving to a new platform by [Insert Date]. Giving to our ministry will be simpler, both for you as a giver and for our church team.

To make this easy for you, we will be moving your current recurring gift schedule to our new system, so all you will need to do is update your preferred payment method.

You will be receiving an email from [Church Name] (ShelbyNext Giving) <info@shelbygiving.com> with a secure link to your account. Once you click the link you will just need to take two steps

- 1) Enter your desired password
- 2) Enter your preferred method of payment and click save**

The link in the email is time sensitive (72 hours), so be sure to update as soon as possible.

The automated giving with our previous provider will be [Insert More Info as you prefer]

If you need additional assistance, please contact [Insert Contact Info]

Thanks again,

Donor Import

Simplified Switching

Let's work together to create a plan to communicate the switch, collect the data needed, and make it happen seamlessly for your donors

Guidance on Data Collection

Your Giving Success Coach will help you know what data you need for import. You don't have to tackle this alone!

Make the Switch & Follow Up

Do the import together to make sure everything goes as smoothly as possible. We will also help you create a next steps and follow up plan post-import for the smoothest transition.

Oceanside First
Presbyterian Church

John,

We've switched over to ShelbyNext | Giving! Click the complete setup link to finish setting up your new giving account. Make sure you delete your current recurring gift in your previous account.

Complete account setup as soon as possible by creating a new password for your account. [Click here](#) to complete.

John,

We've switched over to ShelbyNext | Giving! Click the complete setup link to finish setting up your new giving account. Make sure you delete your current recurring gift in your previous account.

Complete account setup as soon as possible by adding your preferred payment method to keep your recurring schedule active and up to date. [Click here](#) to complete.

Recurring gift summary

Fund	Amount
General Fund	\$100.00
Processing Fees	\$50.00

New & Coming Soon



Pledge Options

Bring your Campaigns to Life

Whether your budget is built on pledging, you are entering a mutli-year building campaign or are doing a one-time pledge event, this newly added function can digitize your work and save you time!



Stewardship Campaign

Starts: 8/1/2022 **Ends:** 8/1/2023

Total Pledge Amount	Start Date	End Date
\$ 0.00	08/12/2022 (today)	08/01/2023
Frequency	First Recurring Payment	
Select...		
<input type="checkbox"/> Make non-recurring payments with cash/check/other	\$200.00 raised of \$10,000.00 goal Stewardship Campaign	
<input type="checkbox"/> Include a payment towards pledge now		
Remaining Pledge Amount:		\$0.00

Submit

In 3 easy steps, you can create your own Pledge Campaign

Pledge Options

Bring your Campaigns to Life

Whether your budget is built on pledging, you are entering a multi-year building campaign or are doing a one-time pledge event, this newly added function can digitize your work and save you time!

1. Create a Fund for your Campaign
2. Create a Pledge Drive
3. Create a Pledge Card

The screenshot displays a web interface for a campaign titled "Missions Relief". At the top right is a user profile icon with the initials "JM". Below the title are three tabs: "Form", "Scheduled", and "History", with "Scheduled" being the active tab. The main section is titled "Scheduled giving and payments" and includes a note: "If any recurring payment was selected on a form submission where a processing fee was accepted or required, a processing fee will apply in addition to each scheduled amount." There are two entries in a list:

Amount	Description	Payment Method	Frequency
\$3.93	Weekly to Stewardship	Visa x1111	Recurring
\$3.93 to Stewardship			
Status: Active			
Started: 8/11/2022			
Duration: Ends on 7/27/2023 (49 installments left)			
Next gift: \$3.93 on 8/25/2022			
\$5.00	Monthly to Central Location Tithe	Visa x1111	Recurring

At the bottom, it says "Online Giving powered by Giving Help Desk".

Automated Check Deposit

Coming Soon!

Want to save even more time... and your sanity? Automated Check Deposit lightens your load on manually entered tasks you complete on a weekly basis. Easily scan your paper checks into a web-based portal and sit back while they deposit into your bank account without a trip to your bank!

- Your giving account does the heavy lifting of reporting for you – checks will appear on the Transaction Report and the Donor Record.
- Once your checks are funded, deposit reporting will be made available to reconcile with your bank statement.
- Eliminate transit of checks to and from the bank by staff or volunteers



Additional Fees Apply

What's Next?

Glad you asked!

Webinar Recording

Yes, we did record today's session and will be sending it out via email to everyone who registered!

Talk to a Team Member Quickly

Are you ready to start now? Want to have Text Giving ready for Easter?

Text ONE to 313-351-4770

Email:

churchsuccess@ministrybrands.com

Or Scan Here



Follow-Up

Our Success Team will be touching base soon to see what questions you have and how they can assist.



Thank you for attending!

Ministry Brands®

