



How to Use

---

ShelbyNext | Giving With v.5

Updated: 9/29/2017

©2018. All Rights Reserved

Other brand and product names are trademarks or registered trademarks of the respective holders.

# Contents

- OVERVIEW.....3**
- ACCESS YOUR ADMINISTRATION SITE .....3**
- ORGANIZATION > SETTINGS .....3**
  - BILLING SETTINGS ..... 3
  - GIVING SETTINGS..... 3
  - IMPORTANT LINKS:..... 4
  - CUSTOM EMAIL TEMPLATES..... 4
- ORGANIZATION > FUND MANAGEMENT .....5**
- IDENTIFYING SHELBY V.5 PURPOSE COUNTERS .....6**
- OBTAIN EXPORT FILE FROM SHELBYNEXT | GIVING.....7**
- IMPORT SHELBYNEXT | GIVING FILE INTO SHELBY V.5 CONTRIBUTIONS .....9**

---

## Overview

---

This document focuses primarily on the **Organization > Settings and Fund Management** in ShelbyNext | Giving and how to obtain the export file from ShelbyNext | Giving and import that data into v.5.

---

## Access Your Administration Site

---

You can access your ShelbyNext | Giving Administration site at <https://www.shelbygiving.com/cp/>. Use the login and password that our ShelbyNext | Giving Team sent.

---

## Organization > Settings

---

The **Settings** page is used to initially configure your ShelbyNext | Giving account. Click **Organization** and choose **Settings** to access the page.

---

### Billing Settings

---

**Cards Accepted Display:** Select each type of card to be accepted, Visa, MasterCard, Discover, American Express, Debit Card, and/or Check Card.

---

### Giving Settings

---

**Allow Giving to Multiple Funds in One Donation:** Choosing **Yes** allows donors to split donations between more than one fund.

**Allow Quick Give:** Choosing **Yes** allows donors to submit a donation without having to login. This is an added convenience for donors who just need to donate quickly (often times from their mobile device). When a Quick Giver donates, the system assigns the donation to their account if a match exists based on first name, last name and email. If an identical account doesn't exist, it creates the account for them.

**Allow Installments on Scheduled Giving:** Choosing **Yes** enables the donor to select the number of Installments (how many donations) when adding **Scheduled Giving** to a fund. For example, if a donor is scheduling to donate to the Building Campaign on a Monthly frequency, they could choose 24 as the number of installments from the Start Date.

**Donor Covers Fee:** Choosing **Yes** allows you to specify a percentage in which the donor has the option to be charged at the time a donation is being made to cover the transaction fee.

## Important Links:

**Test ShelbyNext|Giving Launch** – Click this link to see the portal that your contributors use to give online.

**View Integration Code** – This includes the URL and widget that can be used to create an online giving button to be used on your website.

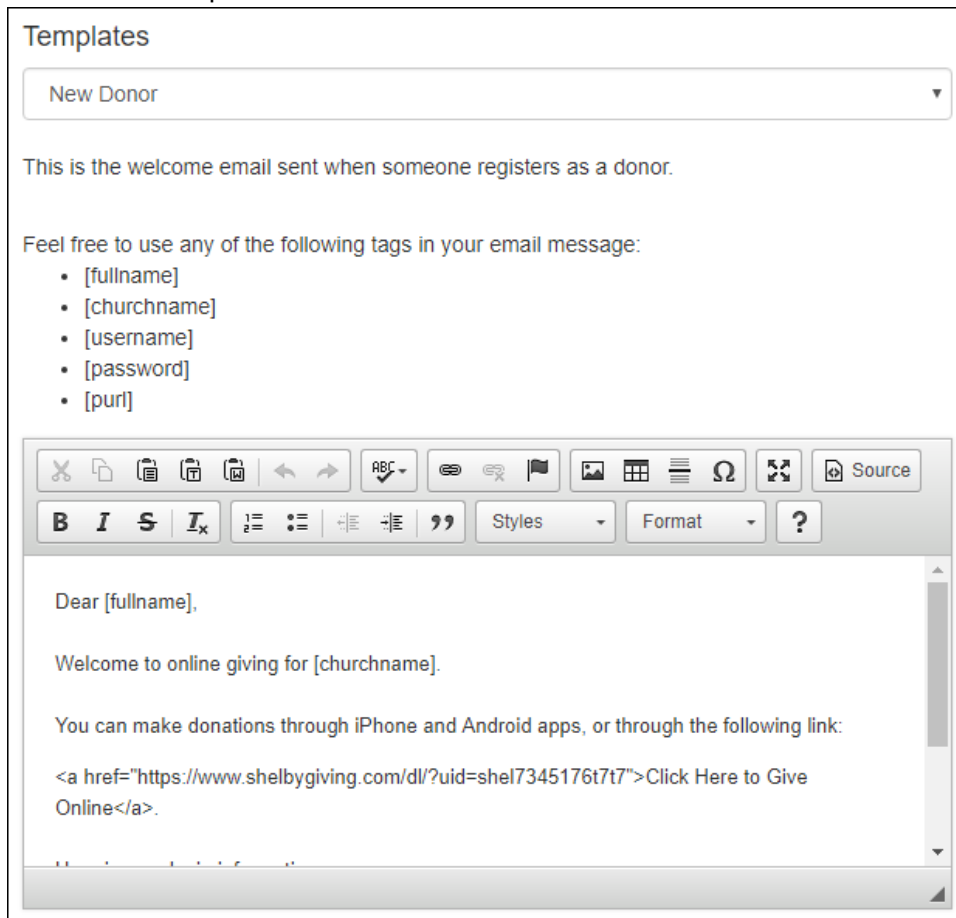
**Click here to claim your personal url** – This is great for Mobile devices.

## Custom Email Templates

To customize email templates, click **Manage Email Templates**. The available merge fields used must be enclosed in brackets (e.g., [fullname]).

You can easily modify email templates for the following items:

1. New Donor email when a donor creates an account.
2. Donation Receipt email when a donation is received.



The screenshot shows a web-based editor for email templates. At the top, there is a dropdown menu labeled "Templates" with "New Donor" selected. Below this, a text box contains the description: "This is the welcome email sent when someone registers as a donor." Underneath, it says "Feel free to use any of the following tags in your email message:" followed by a bulleted list of merge tags: [fullname], [churchname], [username], [password], and [purl]. The main editing area features a rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, quote, styles, format, and help. The editor content shows a draft email: "Dear [fullname],", "Welcome to online giving for [churchname].", "You can make donations through iPhone and Android apps, or through the following link:", and a link: "<a href='\"https://www.shelbygiving.com/dl/?uid=shel7345176t7t7\"'>Click Here to Give Online</a>."

**Templates**

Donation Receipt

This is the confirmation email sent when a donation has been successfully processed.

Feel free to use any of the following tags in your email message:

- [amount]
- [churchname]
- [fullname]
- [ordernumber]
- [date]
- [comment] (this is the fund name for the donation)

ProcessNumber: [ordernumber]

Gift Date: [date]

Dear [fullname].

Thank you for your contribution of \$[amount] for [comment]!

- [churchname]

## Organization > Fund Management

Manage the funds/designations and the fund numbers that will be displayed on your giving page.

**Note:** If you plan to export the gifts from ShelbyNext | Giving and import them to your Shelby v.5 database, please make sure you included the **Purpose Counter** from Shelby v.5 in the **Fund Code** field. See the sample below. Refer to the [Identifying v.5 Purpose Counters](#) section below if needed.

Add Fund
×

---

**Fund Status** Active

**Parent Fund**

**Fund Name**

**Fund Code**

**Start Date**

**End Date**

## Identifying Shelby v.5 Purpose Counters

To use the encrypted import format you need to set up your funds in ShelbyNext | Giving with Shelby v.5 purpose counters. The format is Purpose Description|v.5 Purpose Counter (e.g., Budget Giving|41).

Use the following query to identify your Shelby v.5 purpose counters. To load this query log in to Shelby v.5 and launch the ShelbyQUERY application. If you do not see it listed, have your Shelby v.5 administrator give you rights. Copy the query text below into ShelbyQUERY and click the **Load Grid** button to display results. You can then click the **Save** button and give the query a name to save it for future use. As you add new funds and need to set them up in ShelbyNext | Giving you can come back to ShelbyQUERY and go to File > Open to rerun it.

```
SELECT [Shelby].[CNPur].Counter
, [Shelby].[CNPur].CoNu
, [Shelby].[CNPur].Purpose
, [Shelby].[CNPur].Descr
, [Shelby].[CNPur].BeginDate
, [Shelby].[CNPur].EndDate
FROM [Shelby].[CNPur]
```

Here is an example of results:

Counter	CoNu	Purpose	Descr	BeginDate	EndDate
41	1	TITHES	Budget Giving 2017	1/1/2017	12/31/2017

In this example, the Counter is 41 and the description is "Budget Giving 2017". This needs to be set up as a Fund in ShelbyNext | Giving. Refer to the Organization > Fund Management section above.

Repeat this process for every Shelby v.5 purpose you wish to add as a fund in ShelbyNext | Giving.

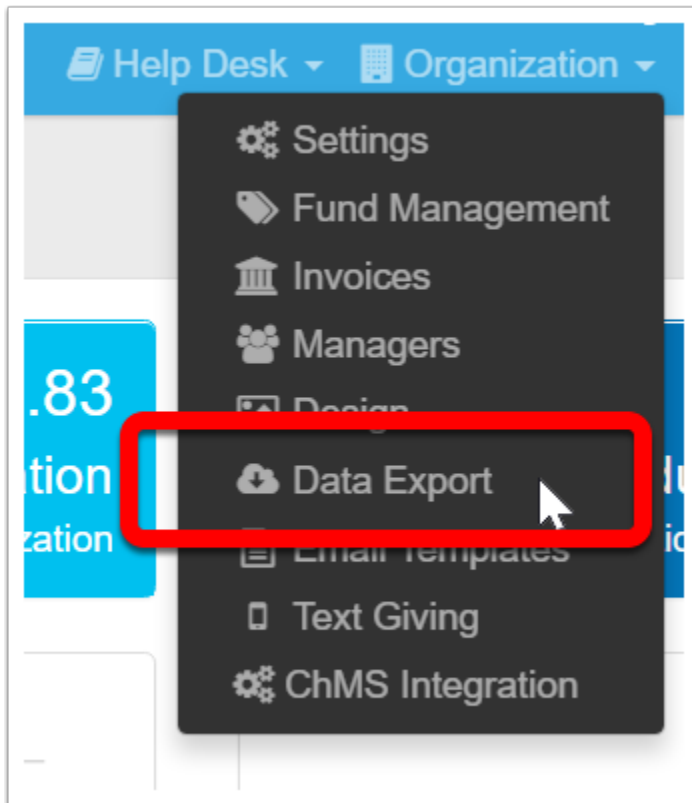
## Obtain Export File from ShelbyNext | Giving

Log in to your ShelbyNext | Giving Administration Portal site as an administrator.

ShelbyNext | Giving allows you to securely export your giving data in an encrypted format for import into Shelby v.5 Contributions.

To generate data exports, click **Organization** > **Data Export**.

**NOTE:** If you do not see the **Data Export** option under the Organization tab in your control panel, please contact the primary manager for your online giving account. Your user permissions will need to be updated to include this option.



You then have the option to choose **Shelby V5** from the **Select Profile** drop down.

After you have chosen the export profile, choose the **Start** and **End Date** of the export data you would like to generate, and then click **Export Data**.

## Data Export

### Export Profiles

#### Select Profile

- Shelby V5
- ACS
- CAA Contribution
- Church Community Builder
- Church Membership Online
- Custom
- Generic
- Help Mate
- IconCMO
- ParishSOFT
- Power Church
- Servant Keeper
- Shelby (Legacy)
- Shelby Arena (Legacy) Xml
- Shelby V2
- Shelby V5**
- SimpleChurch CRM
- TheCity

### Export Options

Transaction Type

**Start Date**  
05/01/2019

**End Date**  
05/02/2019

**Donors to Include**  
Include donors with blank IDs / envelop

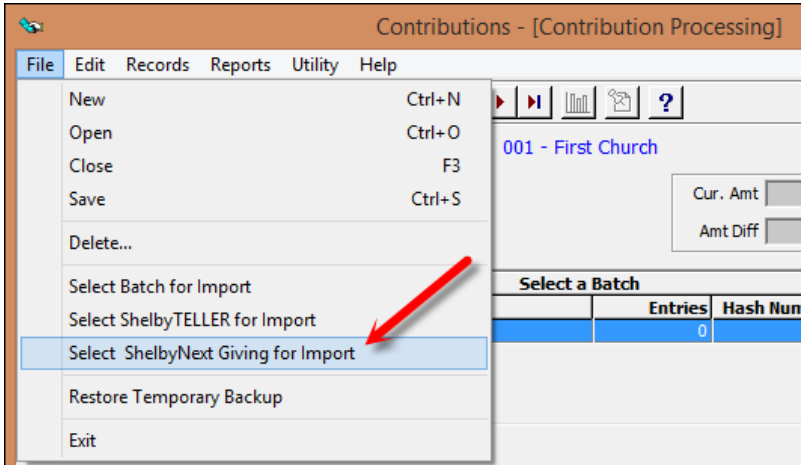
[Export Data](#)

End Date      Record Count

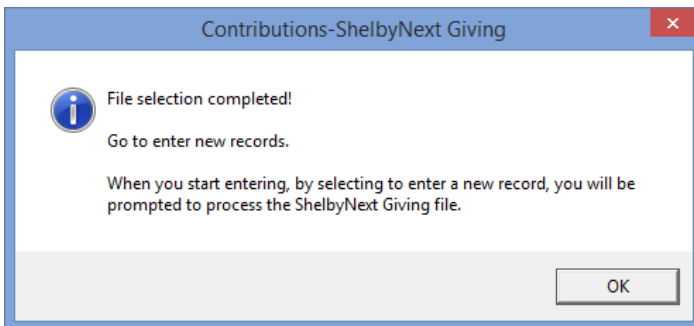


## Import ShelbyNext | Giving File into Shelby v.5 Contributions

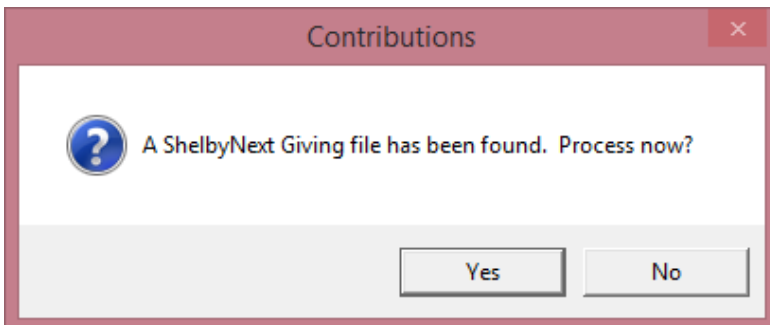
Open the Shelby v.5 Contributions application and click **Contribution Processing**. Select **File -> Select ShelbyNext Giving for Import**.



Browse to the encrypted giving file you exported from ShelbyNext | Giving and double-click to select the import file.

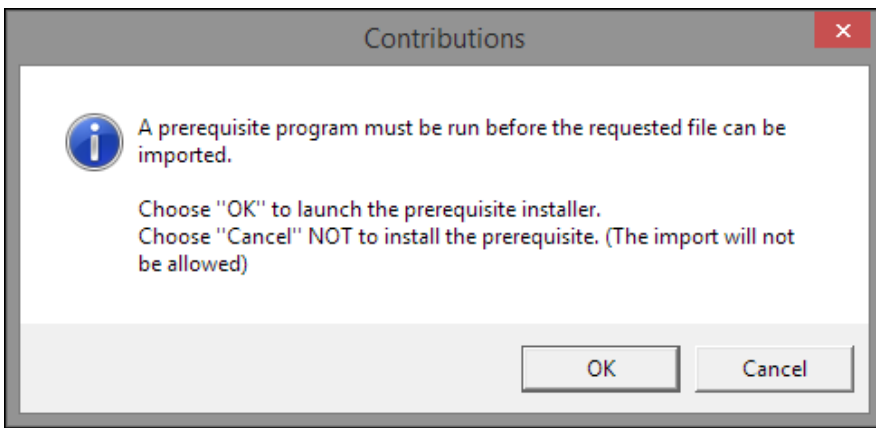


Create a new **Batch** and begin entering a new gift. Click the **Yes** button when prompted to process the ShelbyNext | Giving file.

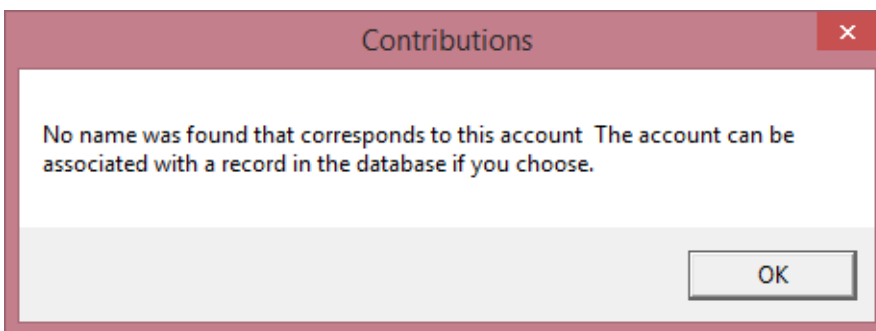


A prerequisite must be run the first time an import is attempted on each workstation. Click **OK** if prompted to launch the prerequisite installer.

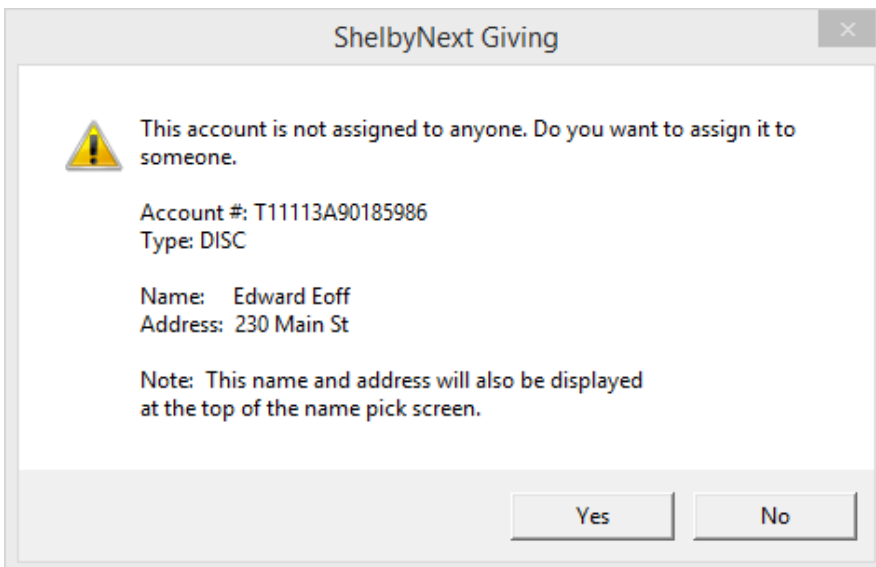
**Note:** If an error 429 is received, close completely out of Shelby, then right click on the v5 desktop icon and select "**Run as Administrator**". Login and reattempt the import.



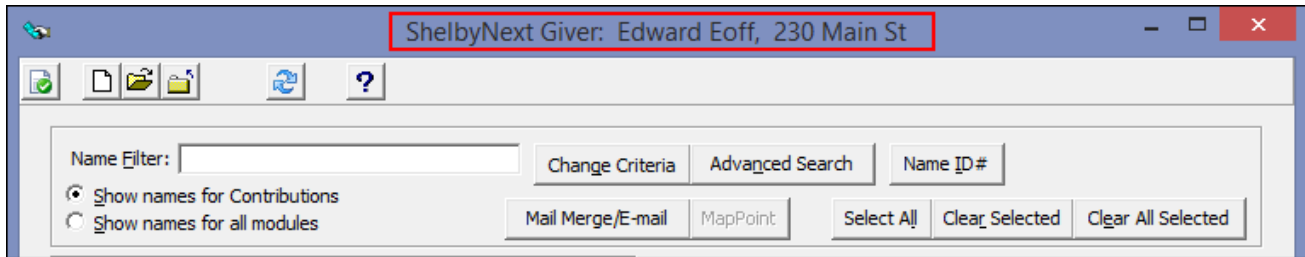
The giving records are imported, and if Contributions finds a gift where the account information is not matched to a GlobaFILE record you are notified that no match is found.



Click the **OK** button to display information for the unassigned gift. Notice that the name and address is referenced to help you find the individual to whom the gift belongs.



Click the **Yes** button to display the GlobaFILE search screen. Search for and select a name or enter a new name to associate with the gift. Any future gifts from the same account will be automatically assigned to the selected individual.



**Note:** The search screen also displays the name and address of the ShelbyNext Giver in the title bar (see above).