Shelby Systems Church How To Guide

INTRODUCTION: TRANSFORMING CHURCH ADMINISTRATION WITH SHELBY SYSTEMS

Managing a growing congregation involves far more than Sunday sermons and midweek Bible studies. Behind the scenes, church administrators juggle membership records, contribution logs, volunteer schedules, and financial stewardship—often with limited time and resources. This is where a powerful church management platform like Shelby Systems steps in. Whether you are a first-time user or looking to optimize your current workflow, this **Shelby Systems Church How To Guide** will walk you through the essential steps to harness the full potential of this robust software. From setting up your database to generating year-end statements, you will learn practical strategies that save time, reduce errors, and strengthen your ministry's administrative backbone.

Shelby Systems offers a suite of tools designed specifically for churches: ShelbyNext (a cloud-based platform), Shelby Arena (a traditional on-premise solution), and specialized modules for contributions, accounting, and check-in. This guide focuses on common tasks that every church administrator needs to master. By following these step-by-step instructions, you will be able to quickly mobilize your team, maintain accurate data, and focus more on shepherding your people.

1. GETTING STARTED: INITIAL SETUP OF YOUR SHELBY SYSTEMS ACCOUNT

Before diving into specific features, you need a solid foundation. Whether you are using ShelbyNext or Arena, the initial configuration determines how smoothly your entire system will run.

1.1. Creating User Profiles and Permissions

Begin by defining who in your church staff or volunteer team will have access. Shelby Systems allows you to set granular permissions—decide who can view member details, edit records, run reports, or process contributions. To do this:

- Navigate to the **Administration** or **System Setup** menu.
- Select **User Management** and click **Add User**.
- Enter the user's name, email, and a temporary password.
- Assign roles (e.g., Administrator, Pastor, Financial Secretary, or Custom Role).
- Under **Security Groups**, check the specific modules each user can access. For example, the treasurer should have access to Contributions and Accounting, but not necessarily to the Event Planning module.

Best Practice: Avoid giving full admin rights to everyone. Instead, create role-based groups that correspond to your church's organizational structure. This protects sensitive data and simplifies future training.

1.2. Importing Existing Data

If your church is migrating from another system, Shelby Systems provides import tools. Typically, you can upload a CSV or Excel file containing member names, addresses, phone numbers, and email addresses. Before importing:

1. Clean your data: remove duplicates, fix formatting inconsistencies (e.g., phone numbers, zip codes).
2. Map your fields to the corresponding Shelby fields (e.g., "First Name" to "First Name", "Cell Phone" to "Mobile Phone").
3. Run a test import with a small sample (10–20 records) to verify accuracy.
4. Review the import logs for errors, then proceed with the full import.

Once data is in, run a quick report to confirm total member count and verify a few records manually.

2. MANAGING MEMBERSHIP RECORDS: THE HEART OF YOUR DATABASE

An up-to-date membership directory is the backbone of church communication. With Shelby Systems, you can segment your congregation by families, individuals, or groups (small groups, choir, volunteers, etc.).

2.1. Adding New Members

When a new person joins your church, add them promptly. Go to **People** > **Add New Person**. Fill in essential fields:

- **Name and Contact Info:** First, last, preferred name, address, phone, email.
- **Demographics:** Birthdate, gender, marital status, anniversary date.
- **Membership Status:** Active, Member, Visitor, Inactive. Use custom statuses as needed.
- **Household Linking:** Link family members together so that mailings and statements can be combined. For example, create a "Smith Family" household and add John, Mary, and their children.

Tip: Use **Custom Fields** to track additional information that matters to your church—baptism date, spiritual gifts, military service, or preferred serving area.

2.2. Searching and Filtering Your Database

Shelby's powerful search tool allows you to find any record quickly. Use the global search bar at the top of the screen, or go to **People** > **Advanced Search**. You can filter by:

- Name or partial name
- Address, city, zip code
- Anniversary or birthday month
- Group membership (e.g., only Sunday School teachers)
- Date last attended (useful for identifying inactive members)

Save frequently used searches as "Saved Queries" so you can run them with one click—ideal for monthly birthday lists or visitation follow-ups.

3. PROCESSING CONTRIBUTIONS: ACCURATE STEWARDSHIP

Tracking tithes and offerings is one of the most sensitive tasks in any church. Shelby Systems offers a dedicated Contributions module that handles everything from weekly envelopes to electronic giving.

3.1. Setting Up Contribution Funds and Envelopes

First, define the funds your church collects—for example:

- General Tithes & Offerings
- Building Fund
- Missions
- Children's Ministry

Go to **Contributions** > **Fund Setup** and create each fund with a unique code and name. If you use numbered envelopes, assign each member or family a permanent envelope number through their profile.