Shelby Next Portal Tutorial

Cumming First United Methodist Church is excited to now offer Shelby Next portal logins to its member to update personal information and to see their giving. To login to your account please to go <u>cfumcga.shelbynextchms.com</u>. Credentials for the portal would have been emailed to your email address on file. If you have not received this email, please contact our Financial Administrator at 770-887-2900 ext. 232. At this login screen please enter your username and password from the email and hit the green login button.

	CUMMING FIRST UNITED
	LOGIN
USERNAME	
PASSWORD	Forgot Password?
	LOGIN
	OR
*	Login with MinistryID
	What's this?

Upon logging in you will be presented with the following screen. Please note, all information presented for this tutorial is for a fictitious person.

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CUMMING PEST LINTED					0 JS	
🎎 Groups	Hello Joe!				View Profile	ſ
My Giving					Logout	
() COLLAPSE						
	Src	ips	0	My Info		

To see and update your personal information such as address, phone number, email etc. either click on the initials of your name in the top right-hand corner of the screen and then select "View Profile" (see blue arrow above) or click on your initials on the main page out to the right-hand side where it says "My Info" (see green arrow above). Either selection will take you to a screen that looks like the following.

CIMMING FIRST UNITED					0 JS III
🚨 Groups	Joe Smith				
My Giving	Giving Account				
() collapse	Joe Smith Maie 53 yrs (0101/1970)	Family JS ^{HUBBAND} 33 yrs	JS Saly Smin 48 yrs	JS Mark Smith 16 yrs	Î
	Contact Info PHONE (EELL) 770-888-9999 EMAIL joe smth@gmail.com				
	Address 770 Canton Hwy Cumming, GA 30040				
	Dates BRTHDAY 53 (910/1970) BAFTIZED DH Jun 01, 1970 CREATED Aug 15, 2023 10.36xm				

From this page you can edit your personal information by hitting the pencil icon (see pink arrow above) in the top right corner just under your initials.

If you edit any information from this page, please be sure to click the blue "Save" button on the bottom of the screen (see blue arrow below) or your changes will be lost.

CLIMMING PIRST UNITED				
L Groups	< Back			
💙 My Giving	Joe Smith			
(COLLAPSE				
0	- Personal			
	First Name		Picture	
	Joe		File must be smaller than 5MB and either PNG or JPG/JPEG.	
	Preferred Name			
	Last Name			
	Smith			
	Formal Full Name O			
	~ Contact Info			
	Cell Phone	Primary Email		
	770-888-9999	joe.smith@gmail.com		
	Format: 123-123-1234	Proceedings (Secol		
	Home Phone	Secondary Email		
	Format: 122-122-1234			
	Poimar. 123-123-1234			

To see your giving history and obtain a giving statement click on "My Giving" on the left-hand side of the screen (see yellow arrow above). On this screen you will see a history of all your giving as well as any current and past pledges as well as their status. You may filter your history for date range and tax deductibility status by hitting the drop down arrows just under Giving History (see purple arrows below).

CIMMING PIRST UNITED					e	e Js	
🎎 Groups	Joe Smith						
💙 My Giving	Giving Account						
⑦ COLLAPSE			± statement				
	Piedges						
	Campaign		Amount	Frequency	Status		
	2023 General Fund 04/01/2023 - 03/31/2024		\$100.00	Monthly	17%	-	
	Giving History Date Filters All History ~ A	Deductible MI ~					
	Date	Category	Details			Amount	
	07/13/2023	2023 General Fund	Pledged; Check	k #1113		\$100.00	
	06/01/2023	2023 General Fund	Pledged; Check	k #1112		\$100.00	
	05/09/2023	Food Pantry	Check #1111			\$50.00	
	02/07/2023	2023 General Fund	Check #1110			\$200.00	

To download a statement of your giving hit the "Statement" button (see orange arrow above). You will be presented with options for date range and tax deductibility status.



After making your selections you will have the option to download a PDF or email yourself a pdf version of the statement (see yellow arrows above). Please note, the statement will go to the email on your profile record which you can find by clicking your initials in the top right-hand corner and selecting "View Profile".

You may update your password for your portal login by clicking on "Account" just under your name (see blue arrow below).

CUMMING FIRST UNITED	
😃 Groups	Joe Smith
My Giving	Giving Account
COLLAPSE	
	Joe Smith JS Male 53 yrs (01/01/1970)

You will be presented with the screen below where you can enter a new password under the credentials section, re-enter the password to confirm, and then hit the blue save button at the bottom of the screen (see orange arrows below).

CLIMMING FRST UNTED		
🏜 Groups	Joe Smith	
My Giving	Giving Account	
© COLLAPSE	Credentials Username JSmith Password To change the password, enter the new password in both boxes. Confirm Password	Settings Receive Interactions Email Digest Daily Weekly Never Unsubscribe From Mass Emails No Yes Dipoly To Beade Names Dipoly To B
	Reset Password And Mail User Account Details	
	Save	

We hope this brief tutorial was helpful for orienting you to your new Shelby Next portal with CFUMC. If you should have any questions, please feel to reach out to us at 770-887-2900 ext 232.