Getting Started with Giving

Initial Setup

☐ Adding Users

Begin by **adding your team members to Amplify** to ensure the right people have access from the start! Establishing users and permissions early protects sensitive information, keeps responsibilities clear, and ensures each person has access to the tools they need to do their role effectively.

Things to Keep in Mind:

- **Unique contact information is required.** Each user must have a unique email address and phone number for the Multi-Factor Authentication (MFA), this helps to protect your organizations account.
- **Access should match responsibilities.** Consider which permissions each user truly needs. You can update access at any time. Specific role-based permissions will be assigned in each Amplify module once the user has been added.

After assigning the appropriate module access, you'll send an invitation for each user to join your organization's Amplify account and complete their setup for login.

Within the Giving module, you can then **adjust each administrator's permissions** to ensure your team has only what they need and donor data stays secure.

Example: If a pastor prefers not to see donor-identifying information, you can disable Donor Profiles, Reporting, and Giving Form Responses, while still allowing them to create forms and customize receipt messaging.

☐ Configuring General Settings

Reviewing **General Settings** early helps create a smooth and secure giving experience for your donors. You can control how your organization accepts payments and how donors interact with your Giving Portal. Reviewing these settings early helps create a smooth and secure giving experience for your donors.

Getting Started with Giving

Things to Keep in Mind:

- **Add billing information.** Your account should have a credit card and checking account on file. This information is used for billing and deposits. Keeping this information updated helps prevent any service interruptions.
- **Select your payment types.** Amplify allows your organization to accept several types of payments including credit cards, ACH bank transfers, and Digital Wallets. Offering multiple options makes giving more accessible.
- **Review your Giving Portal settings.** Your Giving Portal is the place donors visit to easily and securely complete their online gifts. From General Settings you can add your logo and claim your personalized URL.
- **Enable optional features if desired.** You can enable giving reminders to help donors complete unfinished gifts and enable OTC Verification for quick gifts to help protect donor transactions.

Pro-Tip: If your organization uses a Facebook page in place of a website, you can enable the Home Tab feature in your Giving Portal to showcase up to five forms and highlight ways for people to support and engage with your ministry.

☐ Adding Funds

Setting up Funds is essential to get your new giving tool started. Having funds created helps to designated, track and report all donations correctly.

Pro-Tip: Parent Funds and Subfunds help organize giving by ministry area while still providing clarity for specific needs or projects. This structure supports donor intent, builds transparency, and makes giving easier to manage as your ministry grows. See example:

Parent Fund: Outreach Ministry

- **Subfund:** Benevolence Assistance (emergency help for families)
- **Subfund:** Food Pantry

Getting Started with Giving

Customize and Test

☐ Create Forms

Forms help your ministry create simple and meaningful ways for your community to respond. Whether you're receiving gifts, collecting sign-ups, or gathering prayer requests, forms give you a clear path for keeping information organized and easy for people to engage with.

Things to Keep in Mind:

- **Forms help your donors and participants take action.** You can **create a general giving form** for your website or build additional forms for special offerings, registrations, or ministry-specific needs.
- **You decide which funds appear on each form.** **Adding the right funds to the right form** keeps giving organized and ensures everything is routed correctly in the background.
- **Personalize your gift receipts.** You can **automate receipt and confirmation emails** to be sent when someone gives to your ministry, adding a thoughtful and personal touch.

☐ Share your Forms

Once your form is ready, you'll want to place it where your community can find it easily. Each form you create has a QR code or direct links to the form for you to share.

☐ Set up Text Giving

Text Giving gives your community a quick and secure way to give during services or on the go. Once enabled, people can give instantly making generosity accessible anytime.

Pro-Tip: Before launch, have your leadership team test every core giving function, text giving, online giving, fund selection, and basic account actions. This ensures everything works as expected, so your live rollout is smooth and confident.

Getting Started with Giving

Launch Preparation

☐ Donor Management

We've made adding your donors into your digital giving solution easy. There are a few ways you can approach it:

- **Let the donors do the work for you.** This approach ensures donors provide up-to-date contact information. As they give on the new platform, profiles are automatically created using their email. Donors can then set a password to view giving history, manage payments, and edit recurring gifts.
- **Add donors manually.** This method involves the manual addition of individual donor information from within your giving administrator portal. You must have the appropriate permissions set by your primary administrator to perform this function.
- **Seamless transition with the Recurring Giver Transition Program.** If your ministry has many recurring gifts, the Recurring Giver Transition Program makes switching platforms easy. We import existing automated recurring gift schedules and notify donors with a customized email. Donors simply click the link, add their payment method, and continue giving without interruption.

When importing donor profiles and recurring gifts, consider where to store giving history. We recommend importing giving history into only one system; the one that records all gifts, including cash and checks, to avoid duplicate records. If you're using our Amplify People solution, that is the best place to add your donors' giving history!

Pro-Tip: Using our Automated Check Deposit feature? The import tool used as part of the Recurring Giving Transition Program can help you mass-add donor profiles to your digital giving platform to make donor-matching a breeze after checks are scanned for the first time!

Getting Started with Giving

☐ Train your Team

Before launch day, make sure staff and volunteers know what to expect and how to help. Review the new process, common questions, and where to direct people for support, so your team feels confident and ready when givers start engaging.

Launch and Maintenance

☐ Add Links to your Website and Mobile App

Ensure the links to your new giving form are live on your website, social media, and your mobile app, so that the new ways to give are promoted and easily accessible.

☐ Make the Announcement

Clearly communicate when the new giving option is live and how to use it. Use multiple channels; in-person, email, text, slides, and social to reinforce the message. A simple walkthrough or short demo helps set expectations and builds confidence for first-time givers.

☐ Monitor Gifts

After launching, be sure to regularly monitor gifts as they come in to ensure transactions are processing correctly and donors are having a smooth experience. Keeping an eye on your giving activity helps you quickly catch any issues and ensures everything continues running seamlessly.

☐ Year End

Once you're up and running, keep in mind that each year you'll need to send giving statements to your donors by the end of January. Planning ahead will make this process much smoother. Be sure to check out the available resources HERE to help you prepare, stay organized, and ensure everything is accurate and sent to your donors on time.