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.

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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

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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.

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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!

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☐ 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.

Getting Started with Giving

Now that you have mastered the basics, it's time to start getting even more value from your Giving platform. These tools are designed to help your ministry create a smoother giving experience and strengthen your donor engagement.

Continuing to explore these features can help you move from simply processing gifts to building a more connected and impactful generosity experience.

Make Giving Accessible

☐ Digital Wallets

Digital Wallets allow donors to give quickly and securely using trusted payment methods such as Apple Pay, Google Pay, Venmo, and PayPal. By meeting people where they are, ministries remove barriers from the giving experience and simplify the path to giving.

For ministries, enabling Digital Wallets provides clear value by:

- Supporting mobile-first giving in both in-person and online settings
- Using secure and trusted payment methods donors already rely on

This results in a more accessible giving experience that supports mobile giving and makes it easier for donors to complete a gift.

Pro-Tip: When donors know what payment options are available ahead of time, they're more likely to give without hesitation leading to fewer abandoned gifts and a more seamless moment of generosity.

☐ Virtual Terminal

Virtual Terminal equips your team to meet generosity wherever it happens, making it easy to process gifts on behalf of donors when they are not giving through a form themselves. Whether a donor calls the office, stops by in person, or prefers to share their information offline, this feature allows you to complete the gift securely and without delay.

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For ministries, using the Virtual Terminal brings meaningful value by:

- Capturing gifts that would otherwise be delayed or missed, especially from phone, mail, or in-person interactions
- Providing a simple way to serve donors who need assistance or prefer a more personal touch
- Keeping all giving activity centralized within your system for accurate tracking and reporting

This feature lets your team process gifts in the moment, keep things simple, and make sure each gift is handled with care.

Pro-Tip: If your ministry has the People module you can track any cash or check donations there for complete giving statements for donors.

If you don't have the people module you can do a streamlined version of this using the bulk donation feature in the virtual terminal to log these gifts. Learn more **HERE**.

☐ Anonymous Giving

Anonymous Giving empowers donors to give with confidence, dignity, and privacy, especially during sensitive seasons or when they prefer to give without recognition. By removing social pressure, ministries create a safer space for authentic generosity, allowing supporters to focus on impact rather than visibility.

For ministries, **enabling Anonymous Giving within Forms** brings meaningful value by:

- Removing barriers to participation for donors who value discretion
- Building trust by honoring privacy while maintaining responsible gift stewardship
- Inviting new and hesitant donors to engage more freely
- Supporting deeper generosity without compromising internal tracking or reporting

The result is broader engagement, stronger donor relationships, and a giving experience that reflects care for both the donor's heart and the ministry's mission.

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Pro-Tip: To show your donors how they can give anonymously, click **HERE** for a help article you can share with them.

☐ **Impact Reports**

Adding **Impact Reports** to your Giving forms helps donors feel more connected to your ministry by showing how their gifts are making a difference through updates, goals, and progress tracking.

Impact reports add a visual element and storytelling to your goals and missions. This is great for transparency and creating excitement about what is happening in your ministry.

Reports

As your ministry grows, understanding how to use **reporting** tools effectively can help you move beyond simply viewing donations and into making more strategic, informed decisions around generosity and engagement.

☐ **Recurring Giving**

Recurring Giving creates consistency for both your donors and your ministry by allowing supporters to schedule ongoing gifts automatically. Instead of relying solely on one-time generosity moments, ministries can build more predictable giving patterns that support long-term planning and stability.

The **Recurring Giving Report** gives your team visibility into who your recurring donors are, making it easier to celebrate their generosity, express appreciation, and build stronger donor relationships through intentional follow-up and stewardship.

This keeps the focus on relationship-building rather than just reporting.