Getting Started with People

Week 1 | Lay the Foundation

☐ 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.

In your People module, you can begin to create and assign **Security Roles**. Within each of those roles, you can set the **permissions** as needed for that role.

For Example: A kids ministry volunteer or staff member may only need access to Check-In, Groups, and viewing Individuals. While a finance team member will need access to input/view batch giving, Giving Reports and Individual records

Now that you've got your team in place, let's solidify the foundation of your People Module in General Settings!

Getting Started with People

☐ Configuring General Settings

You can access General Settings by clicking on the gear icon located in the upper right corner of the screen.

What you'll configure here:

- The **General Setting** page is the foundational setup area for your church. This is where you'll enter and manage key organizational details including:
  - Church/Organization Name
  - Primary Address
  - Phone Number
  - Preferred Data Formats

- The **Profile Tab** is where you can update profile setting options by configuring fields that will display in individual profiles. **Configurable fields** give you the ability to collect custom information like baptism, birthdate, and marital status.

- The **Giving Tab** is where you'll go to add options and categories to funds. This helps to organize and track donations.

Pro-Tip: Giving categories should align with the funds in your digital giving platform. For example, if your church sends missionaries across the globe, you will create a category called missions in both your People and Giving modules

- The **Service Tab** is where you'll go to enable your SMS & voice messaging. Quickly connect with members using **Mass Contact**. Send weather updates, sermons notes, and daily scriptures through this feature. *Rates may apply.*

Getting Started with People

Weeks 2-3 | Organizing Your People & Groups

☐ Adding Individuals

Pro-Tip: Before adding an individual, take a moment to set up any additional profile fields you'd like to track, such as salvation date, anniversary date, or baptism date. See the General Settings section above for more details.

Adding a new person is quick and easy. Start by entering their basic information, which allows you to add them to groups and communicate with them using Mass Contact. Details, such as a birthday or baptism date, help you provide more personalized care and engagement with your community.

Note: Be sure their cell phone, primary email, and address are accurate and complete. It is best practice to have a unique email address on file for each individual.

If you need to add several people, you can mass import the records with a CSV file. Once everyone has been added, you can organize individuals into families as needed.

☐ Get Organized with Groups

Groups go beyond small groups and help you thoughtfully care for your community by organizing people by visitor or member status, interests, and more. You can create groups for events, ministry teams, mailing lists, and other shared purposes, making it easier to connect with and engage people at every stage.

Before getting started, take a moment to plan the types of groups that will best support your ministry.

Getting Started with People

Creating a group is quick and straightforward, and you don't need every detail figured out upfront. Most groups only require basic information like a name, leader, and properties to get started, and you can always return to update or refine settings later. As needed, you'll also be able to **add details** such as meeting times, check-in or attendance tracking, and other options that support how the group will be used.

Pro-Tip: Simplify creating new groups by **cloning an existing one.**

Week 4 | Managing Giving, Maximizing Impact

☐ Contribution Entry Access & Preparation

Once your team has the right permissions in place, you can begin setting up how you will track and enter giving in Amplify People. Team members who help with giving entry will need permission to create batches, import digital gifts, and view giving reports.

Before you begin entering any contributions, you will want to set up your **Giving Categories** to organize the funds you assign contributions to. Refer back to the General Settings section for a helpful Pro Tip on how to use Giving Categoriies.

☐ Batches: The Core of Contribution Entry

Batches are how you will keep your giving organized throughout the year. Start by importing cash or check contributions.

You will create a batch for each giving period, such as a Sunday service or a special event, so all cash, checks, and digital gifts stay grouped appropriately and are ready for you to enter into your accounting software without confusion.

Getting Started with People

Batches will help you:

- Keep all giving for a date in one place
- Simplify reporting and reconciliation
- Maintain a cleaner financial sync

Pro-Tip: You can tab through fields during contribution entry to complete the process more easily.

☐ Digital Giving

If your ministry uses Amplify Giving, your digital gifts will show up automatically in the donor's record at the exact time the gift is made. You will not need to enter these manually. When deposits finalize, these gifts will be added to a matching batch in your People Module, so your records stay aligned and ready for reporting.

The Power of Integration: Have Amplify Giving? Connecting your Amplify Giving and People modules will help you reduce manual imports, prevent common data entry mistakes, and keep your contribution records clean, accurate, and easy to work with throughout the year.

☐ End of Year Statements

Each year by January 31st, organizations are required to provide contribution statements to donors for the previous calendar year.

In your People module, you can **customize the statement format** to match your ministry's preferences. Once generated, you can **print them to mail out** or **email them directly to your donors** . Check out the **help center** to find more resources for year-end contribution statements.