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!

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☐ 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.*

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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.

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[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.

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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.

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Week 5 | Groups

☐ Group Visability

Groups are a core part of how you organize people in your database. They're not just for small groups, they're the foundation for tracking engagement, managing attendance and running smooth check-in

What to use Groups for:

- **Attendance and Check-in .** Groups can be used to **track attendance** and **check in.** They define who appears on rosters, how check-in stations are organized, and how attendance is recorded for services, events, and classes.
- **Ministry Relationships.** Segment new visitors, regular attenders, members, and volunteers so you can understand where people are in their journey with your ministry.
- **Interests and involvement.** Track who's connected to specific ministries, teams, or activities.
- **Administrative Workflows.** Use Groups for follow-up lists, onboarding steps, communication segments, and pastoral care needs.

Why Groups Matter:

- **Reliable Attendance Data.** Because **attendance** is tied to Groups, you get clear insight into who's showing up, who's missing, and where follow-up is needed.
- **Faster, cleaner check-in .** Organized Groups make **check-in** simple for families and volunteers while keeping your rosters accurate.
- **Targeted communication .** Send the right **message** to the right people—parents, visitors, volunteers, or anyone tied to a specific Group.
- **Better care and engagement.** With clear segmentation and attendance visibility, no one slips through the cracks

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Week 6 | Communication

☐ Mass Contact

Effective communication is the backbone of a successful church management system. It ensures your congregation stays informed, connected, and engaged, while providing your staff with efficient, centralized tools to manage outreach.

Why Communication Matters:

The built-in **Mass Contact** tool allows your church to send timely, consistent messages across multiple channels (email, text, and notifications) directly from your member database. This eliminates the need for external tools and ensures all communication is accurate and up to date.

With communication features in place, your church can:

- **Keep members informed** with service updates, event reminders, and important announcements
- **Strengthen engagement** by staying connected throughout the week—not just on Sundays
- **Send targeted messages** to specific groups (e.g., volunteers, guests, ministry teams)
- **Support pastoral care** through prayer updates, care notifications, and follow-ups .
- **Encourage participation** in events, serving opportunities, and small groups

Pro-Tip: To configure the Text and Voice Messaging use the instructional walkthrough guide in the Getting Started section of the resource center

Disclaimer: Your plan includes 500 monthly messaging credits. Each credit can be used for 1 voice message or 2 text messages. If you exceed this limit, additional charges may apply.

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Week 7 | Calendar and Events

☐ Calendar/Events

Keep your ministries organized and connected by utilizing the calendar and events. With custom calendar views, room reservations, and equipment requests, your team can ensure clear visibility, better coordination, and seamless planning across events and activities.

How to use the Calendar:
Plan, manage, and share everything happening in your ministry from one central place. You can use it for:

- **Creating and managing events** such as services, classes, youth/children's events, and special gatherings .
- **Reserve various items i**ncluding **rooms, vehicles,** or **equipment** .
- **Promoting events publicly** **through your website** and other platforms.
- **Keeping staff aligned** with a shared, up-to-date calendar across ministries.

Pro-Tip: **Create calendar views** for specific ministries so you can display only the events relevant to that group on its specific webpage.

Why an Organzied Calendar Matters

A well-managed calendar is more than scheduling. It directly impacts how smoothly your ministry runs. It provides a central trusted source of information, prevents confusion, improves engagement, and reduces administrative burden.

Pro-Tip: Events created in People can automatically appear in connected products such as the Mobile App, reducing the need to manage multiple systems. Don't have the Mobile App? Learn more by selecting the home icon then Mobile App to check it out!

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Week 8 | Reporting

☐ Reporting

Reporting helps your team move from tracking activity to understanding it. Giving and pledge reports make it easier to review donation trends, monitor campaign progress, prepare statements, and keep ministry leaders informed with clearer data.

Use reports to:

- **Review giving activity** by fund, campus, group, date range, source, tax status, and more.
- **Track pledge progress** with pledged amounts, contributed amounts, percent complete, and individual pledge details.
- **Save repeat views** in My Reports so your team can quickly return to the reports they use most.

Pro-Tip: Use the **Non-Givers Report** to identify people who may need follow-up, care, or updated giving guidance before they fall through the cracks.