Equip Guide

Faithlife Equip
Integrated Suite of Ministry Tools

Group Setup

All-in-One Bundle

Faithlife Equip includes all the administration and discipleship resources your church needs.

Time-Saving Automation

Faithlife Equip saves you time with tools and workflows that cut out busywork so you can focus on ministry.

Discipleship Resources

Faithlife Equip is the only church tech solution that includes Logos Bible Software.

Faithlife EQUIP

Introduction

Welcome to Faithlife Equip! You've taken the first step toward adopting an integrated ministry platform that will both simplify and supercharge your church's use of technology.

This guide will walk you through the initial steps of setting up your church group on faithlife.com. For more detailed help on other Faithlife products, or on other specific topics, visit the Faithlife Help Center at support.faithlife.com.

We'd love to hear from you. Let us know what you think of this resource at https://faithlife.com/store/surveys/trainingfeedback.

About Faithlife

We're a tech company committed to the Church. Our team is always creating new ways to deepen your faith and help you grow. It's what got us started in 1992, and it's what drives us to this day. Our mission is to equip the Church to grow in the light of the Bible.

What Is Faithlife Equip?

When you subscribed to Faithlife Equip, you gained access to a suite of interconnected tools all centered around the life of the church, including:

- Logos Bible Software (personal Bible study, sermon prep, and more)

- Proclaim (church presentation software)

- Sites (church website builder)

- Giving (donation & donor management)

- Groups (online community and administration hub)

- Events management

- ChMS

- And much more

Many churches use different tools to help them in these different areas. This often leads to frustration and wasted time as they have to perform tasks and maintain data in several different platforms. With Faithlife, all of your tools are connected, and you rarely have to input the same information in more than one place. For example, with Faithlife:

- Your events are automatically posted to your church website.

- It takes a single click to publish your sermon to your website and church group—and to make it available to your congregants via their preferred devices and platform.

- Your presentation slides automatically populate with giving data.

- Your church directory in your group and on your website is automatically updated whenever you make a change to a person's record.

How does it work? It all starts with your church group . . .

What Is a Church Group?

If you didn't already have a church group on Faithlife, one was created for you when you signed up for Equip.

Did you know? If you have a church group, you can access your group via the free Faithlife mobile app. Look for the **Faithlife: Community for Churches** app in the iOS and Android app stores.

Your church group serves two key functions:

1. An online community (for your congregation)
Your group is where you can engage together as an online community. Keep group prayer lists, read the Bible together, hold a Bible study discussion, listen to and interact with the latest sermon in your group, and more.

2. A central managing hub (for your staff)
Your church group serves as the link between all of the Faithlife products and resources your church uses. It's where you can manage the tools that help you serve your people, as well as manage and distribute content licenses and purchased books.

Group admins manage your software from the left-hand **Admin** panel of your church group. This panel is visible only to admins of your group.

Note: Even if you choose not to use your church group as an online community for your church, it still acts as the hub for all your Faithlife products. For example, if you only

want to create a website, you'll use your church group to manage much of the content that appears on your site, even if you never use the online community more broadly.

Find Your Church Group

When you first log in to faithlife.com, you'll be taken to **My Faithlife**. This area of faithlife.com aggregates content from all of the groups you're connected to.

For example, as an admin of your group, you might want to join the **Equip Admins** group. (Search for groups using the search box at the top.) You can go to your church group or to any group you've created or joined by selecting it from the left.

Navigate Your Church Group
There are three basic areas in your group.
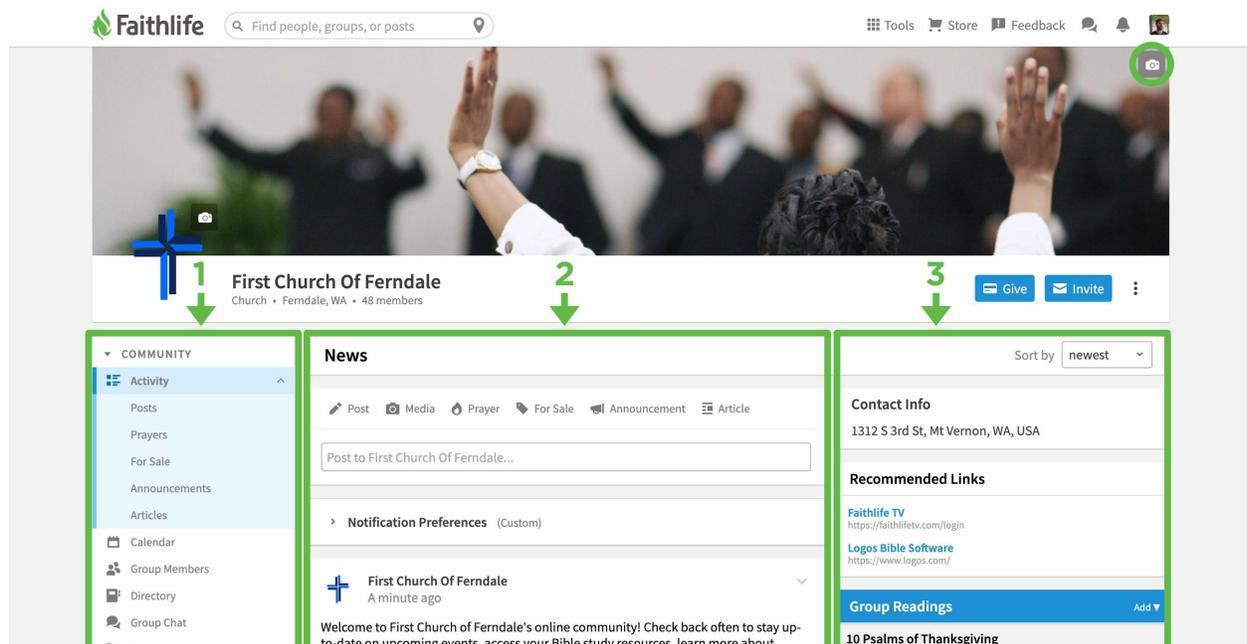
1. **Navigation:** The left-hand sidebar is where you navigate your group.

2. **Content**: The middle area holds the main content you're currently viewing.

3. **Sidebar**: The right-hand panel shows additional information, which you can customize in your Activity feed sidebar settings.

Note: In addition to uploading a group icon, you may also want to add a **group header image**. Select the **gray image icon** 🖼 and upload a wide image set to 2560 pixels by 500 pixels.

1. Navigation Sidebar

Depending on your role in the group, this panel will contain the **Community**, **Admin**, **Group**, and/or **Team** navigation panels.

Community navigation menu
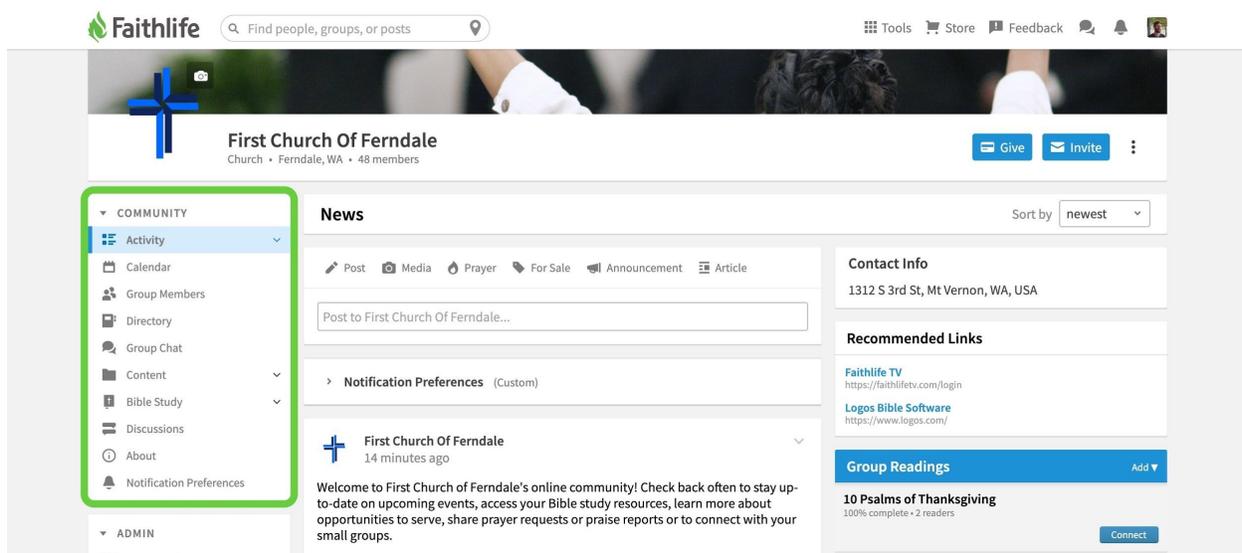
- **Activity:** This is the group's activity newsfeed, which acts as your group's homepage.
- **Calendar:** Create and share group events with your group calendar. If you already use an external calendar, you can also link it to your Faithlife calendar from the settings.
- **Group Members:** Invite, remove, and manage members.
- **Directory:** The directory displays names, photos, and contact information for members and regular attenders. Group admins or moderators can set what information appears in the directory, as well as add and remove specific records from the People page in the Admin panel.
- **Group Chat:** Easily communicate with your entire group via short messages (think text messaging). Any messages sent from here will be visible to the entire group. You can also send a private message to someone in your group or to a group of people from Faithlife messages. By default, whenever you receive a message, you'll receive an email. If you're online, a badge icon will indicate you have a new message.
- **Content:** The Content folder contains many helpful tools: Sermons (Faithlife's audio archiving service), Bulletins, Newsletters, Files, Photos, and Videos. You can adjust what roles have access to this content in your group's settings.

- **Bible Study:** The Bible Study folder expands to reveal several helpful tools for studying the Bible together, including Reading Plans, Logos Documents, and Community Notes.
- **Discussions**: Discussions for your church group on any given topic.
- **About:** A basic informational page for your group, including current administrators of the group. You can update this content from your group's settings.
- **Notification Preferences:** Adjust what notifications you receive from your group.

Admin navigation menu

To fully view and interact with this panel, you must be an administrator. Moderators in your group also have access to many of these features (depending on your group's settings).
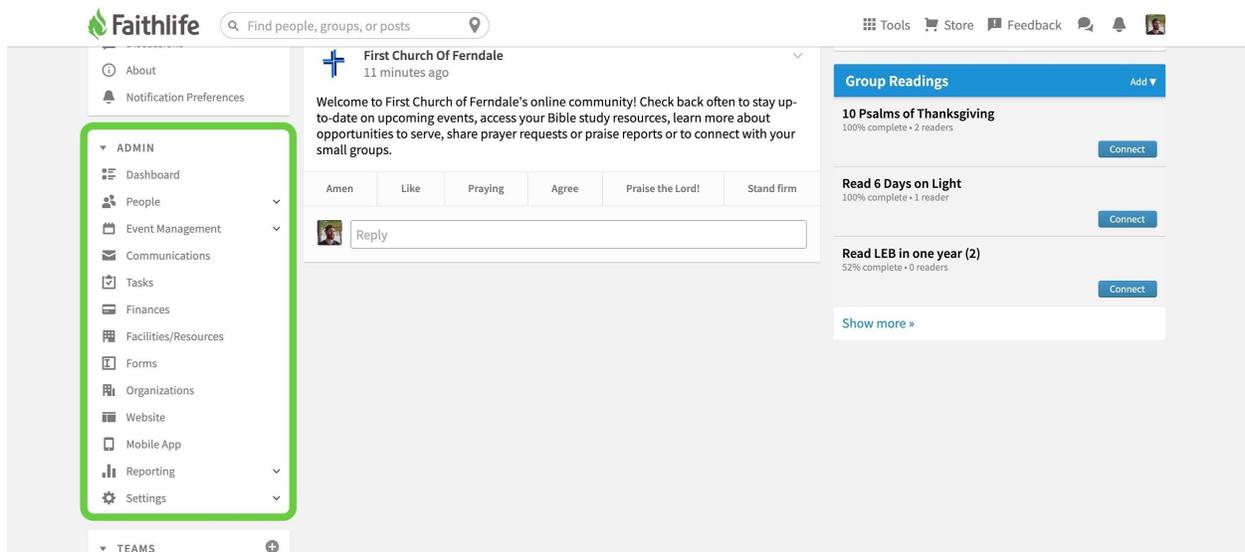

- **Dashboard:** Get an overview of your church group, and let Faithlife help you access and configure other powerful options for your group.
- **People:** Create and manage records for the people in your group. Gather phone numbers, anniversaries, allergies, and any other info your team needs to build meaningful relationships with your people.
- **Events:** Faithlife Equip customers can plan events, track RSVPs, and take attendance.
- **Communications:** Create email and text/SMS communications.
- **Tasks:** Create and manage tasks for teams or individuals.
- **Finances:** Manage your gifts, giver data, giving form, and more.
- **Facilities/Resources:** Organize and manage resources at your church, including rooms, equipment, decor, tables/chairs, etc.
- **Websites:** Access and edit your Faithlife site.
- **Mobile App:** Customize your church's appearance in the Faithlife mobile app.
- **Reporting:** Create and export a range of church data.
- **Settings:** Access various settings related to your group, including Group Settings, Faithlife TV, and Group Licenses.

Note: Users who are Members, Followers, and Public will not be able to see the Admin panel.

Teams and Groups navigation menus

If you have subgroups or teams, navigation panels will display on the left below the admin panel.
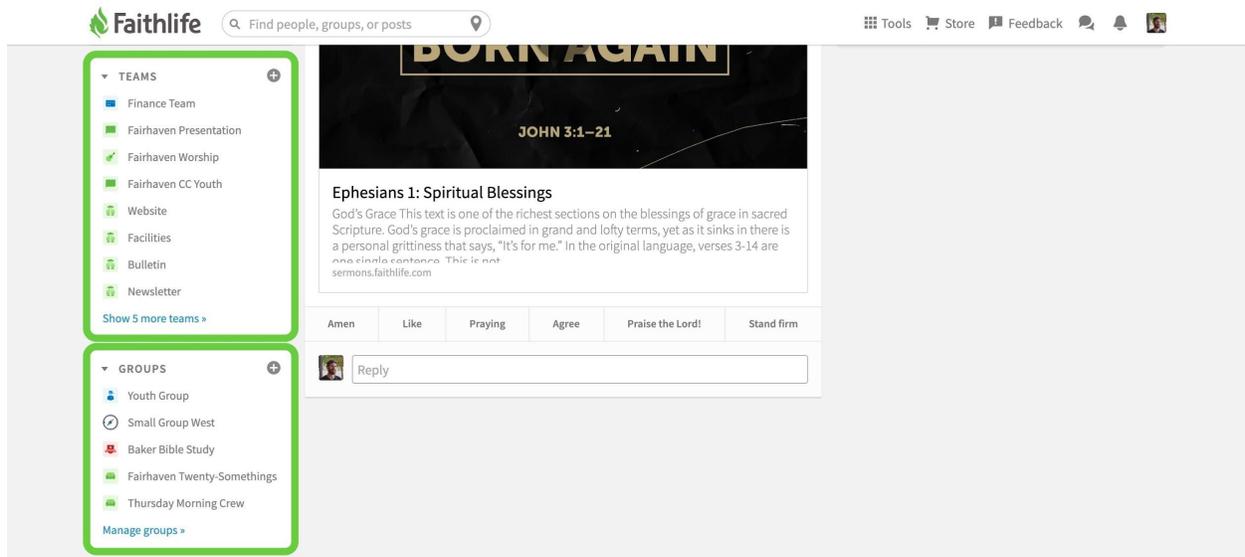
Subgroups are designed to help smaller, specialized groups in your church connect. In contrast, **teams** are oriented around various ministries in your church and sometimes provide special permissions to team members to manage the church's website, data, presentations, or finances.

2. Content Area

The middle section of your group displays the primary content of the page you're viewing.

Note: Adjust who can view or post to your newsfeed from your group's settings.

On your homepage, anyone with permission can post a comment, media, prayer, sale item, announcement, or article. You can also interact with other posts to encourage and care for others in your group. Keep in mind that unless you specifically restrict the viewership of your post, **any post in a public church group will be visible to anyone on the internet.**

Note: If you have Faithlife Sites, posted articles will also automatically appear as blog posts on your website.

3. Notification Sidebar

The right side of your group home page includes a fully-customizable sidebar. Group admins and moderators can control what appears here, including group reading plans and group prayer lists.
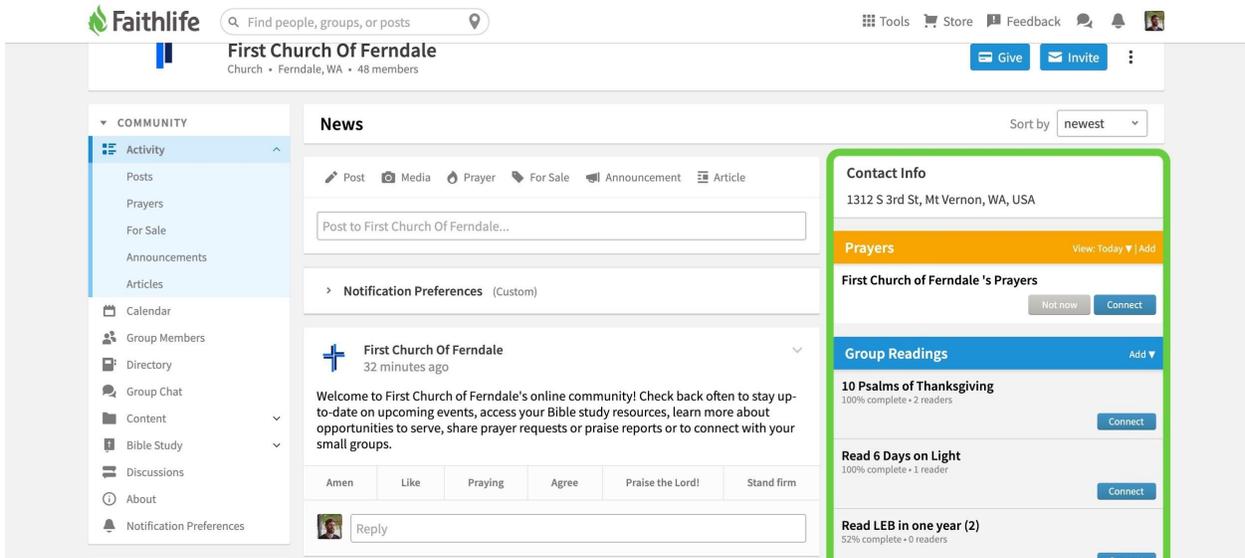
You can adjust what displays in the sidebar from the left-hand Admin navigation panel (click **Settings > Activity Feed Sidebar**). To add a widget to your sidebar, drag it from the left column (**Widget list**) to the middle column (**Active**). A live preview shows your changes in real time.
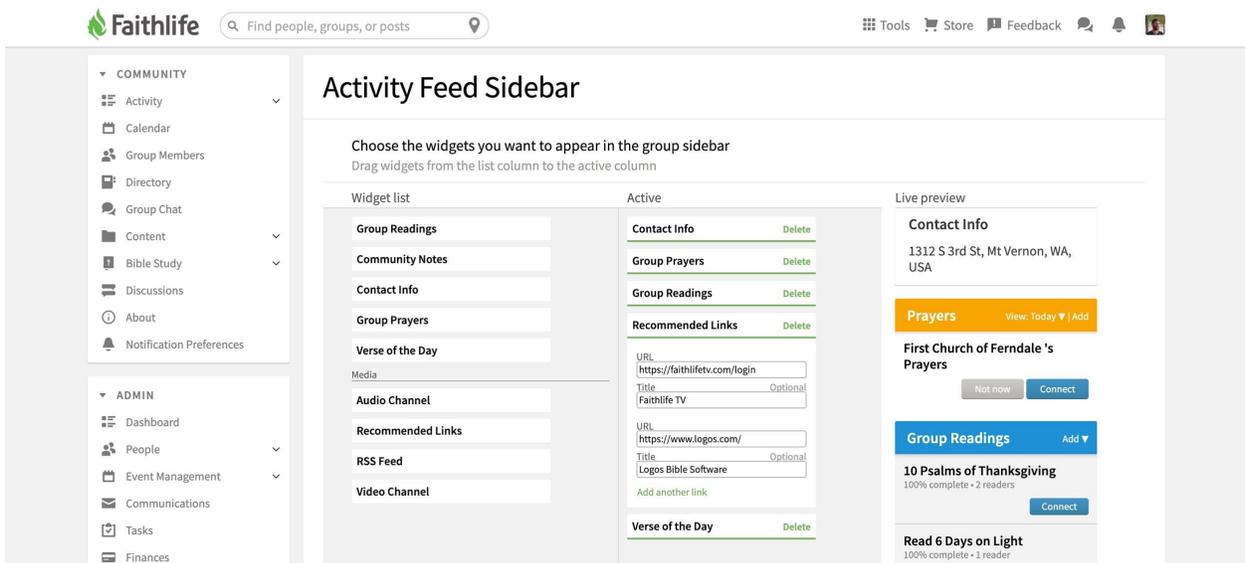
Set Up Your Church Group

You'll want to ensure that your group is set up properly before you invite your congregation to it. Start by adding visuals like your church's logo, a header, etc., then make sure your settings and permissions are set the way you want them. Finally, you'll want to set up key ministry teams and small groups before inviting your people. Follow the steps below to get started.

1. Configure Your Group Settings

Expand **Settings** in the left-hand **Admin** sidebar and select **Group Settings**. The settings on this page are organized under four headings.
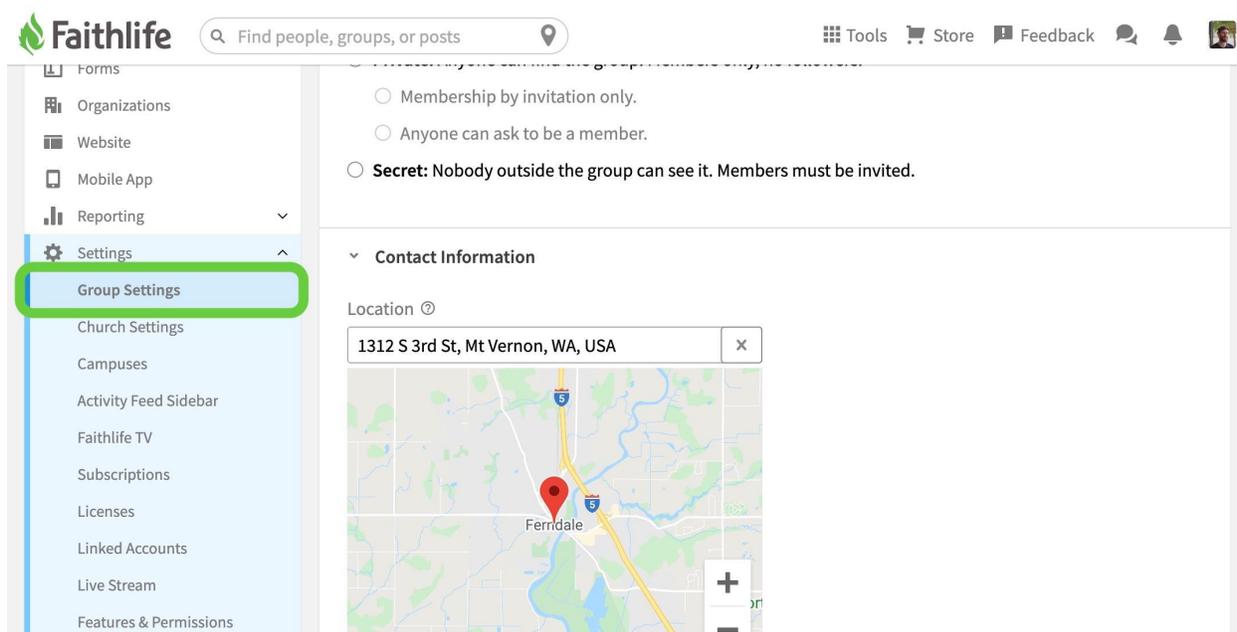
Group Info

The first section holds your group's basic information.

- **Group photo:** Click the photo icon to update your group photo (square images 1024px x 1024px work best).
- **Group name:** This is your official, unique group name. No other Faithlife group can share this exact name.
- **Group URL:** This is your group's unique url (what follows faithlife.com/). To customize your group url, select the text in the input box and insert your own text (spaces not allowed).
- **Group Type:** The type of organization your group identifies as. Each type has default settings to help customize the experience for your group.
- **Group Nickname:** This is the shortened name or abbreviation for the group that displays for your members.
- **Temporary group:** If your group is time-specific, you can automatically remove your group from search results after a period of time.

Privacy and Safety

Change your privacy level to control how visible your group is to those who have not yet joined. In Faithlife terminology, a **follower** is anyone with a Faithlife account that has read-only access to your group while a **member** is someone you accept into the group. You can set specific permissions for each element of your Faithlife group below.
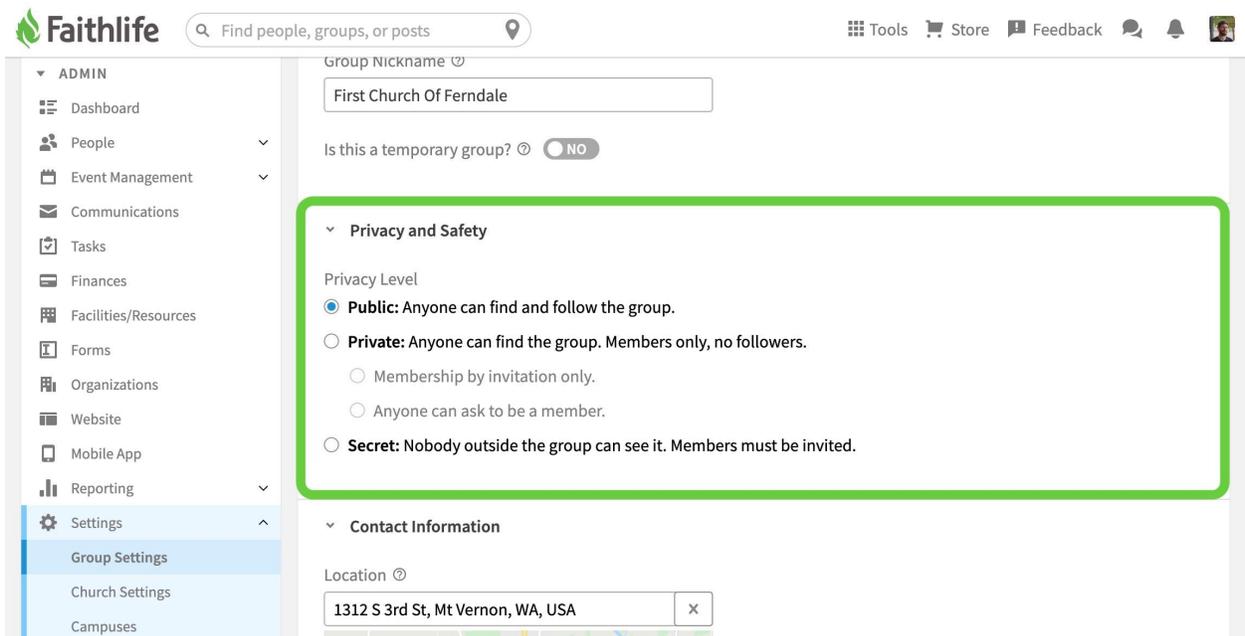
Privacy is set on a per-group basis. In other words, you can set your main church group to one setting and each subgroup to a different setting. Privacy settings stay with the individual group and are controlled on two levels:

- **Group privacy** controls who can see your group and its public content on faithlife.com.
- **Content privacy permissions** control what content is visible to the public, followers, or members who can see your group.

Note: Only **Admins and moderators** in your group can adjust group settings and permissions.

Group Privacy Controls

Scroll down to the **Admin** panel, expand **Settings**, and click **Group Settings**. Choose between three options:
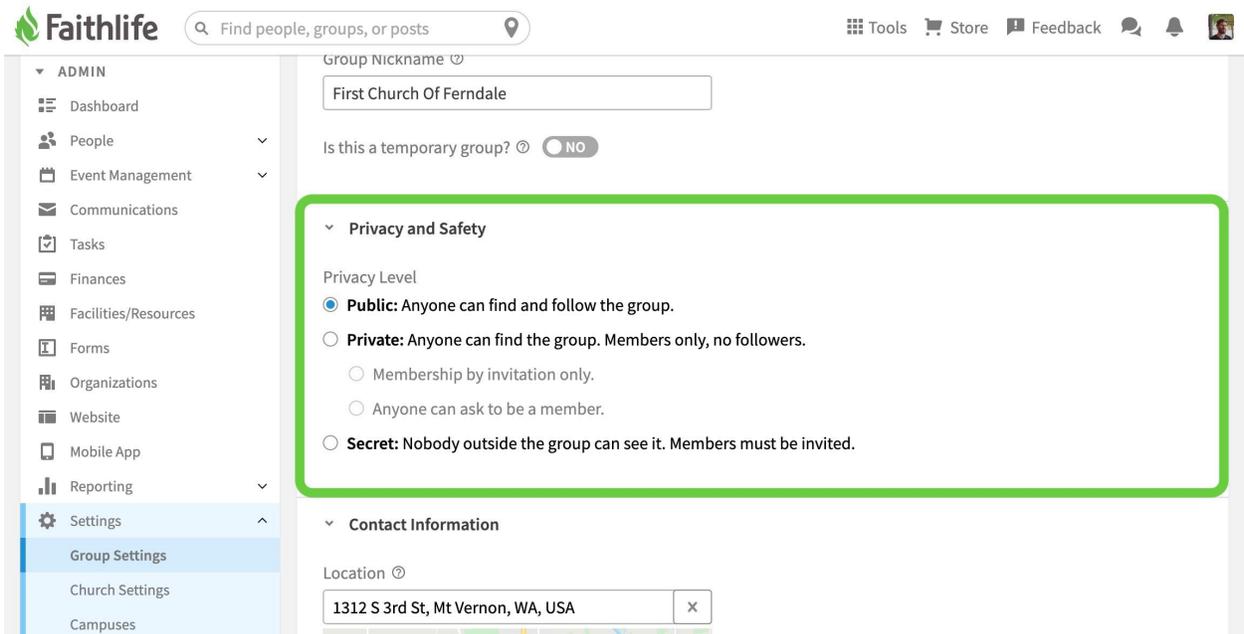
Public

- Anyone can find and follow your group. Only those you invite can become members.
- Only content privacy level permissions within your group that are set to **Public** or **Followers** will be visible to those who haven't joined your group.
- Even if your group is set to the Public privacy level, you can set individual content to display for members-only. If you're concerned about the public viewing your content within your group, anyone who posts to your site can restrict who can view their post by setting the "To: members" only.

  Note: This is often the best setting for a church, as it allows people to find you online.

Private

- People can find your group on faithlife.com.
- No one can join or follow your group without your permission. You can set whether or not people can request to join your group (select one of the sub-options to set your preference).
- If any content privacy level is set to **Public**, that content will still be visible to anyone who views your group whether or not they are a member.

Secret

- The group is invisible to those not currently members or invited.
- All privacy level permissions set within the group are limited to **Member** and higher.
- No one outside your group will be able to view your group or any of its content.

Content Privacy Permissions

Admins can set specific privacy permissions for content types within your group from the left-hand sidebar. Scroll down to the **Admin** panel, expand **Settings**, and click **Features & Permissions**.

There are several categories to allow granular control over each feature of your group. Change the permission levels for any setting by moving its slider to your desired level. Your changes save automatically.

- **Admins:** complete control over all group settings and actions
- **Mods:** maintain and manage the group
- **Members:** regular members of the group
- **Followers:** those with a Faithlife account who can read group posts for *followers* or *public* without becoming members
- **Public:** anyone online with a link to your content

Certain actions are restricted so you cannot inadvertently extend this privilege too far. Others are more flexible and will require your active adjustment.

Parent and subgroup permissions are treated separately. One will not affect the other. For example, when creating an event for a particular subgroup the permissions you set for the event apply to that subgroup and not to the group as a whole. This means that creating an event for Moderators in your Finance team does not allow Moderators of the main church group to see the event (unless they are also Moderators of the Finance team).

Contact Information

On your group settings page, add your contact information to help others to connect with you elsewhere online or in person.
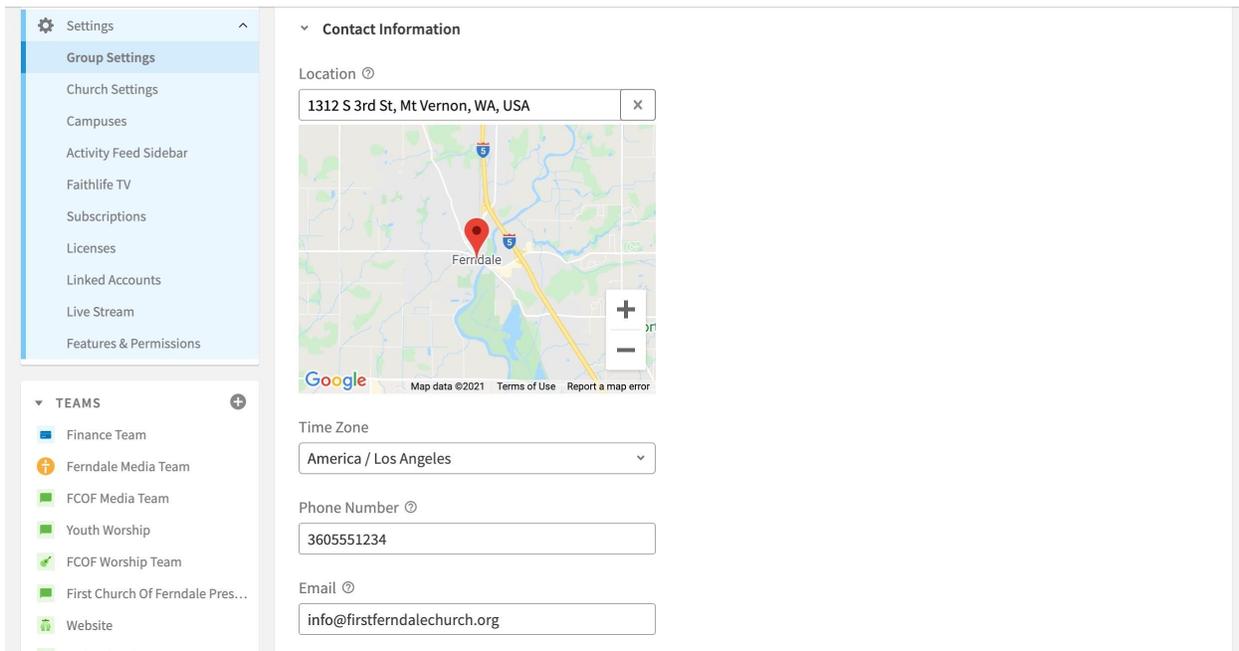
When you add your church's full street address, an interactive map displays below. If you don't want to include your full address, at least add a city so others in your area can connect with you.

Note: As you set up other products, these contact details will transfer for you. For instance, when you set up a Faithlife site, your email, phone number, address, and social media profiles will automatically display in your website footer.

About

Change how your group appears to others in the about section.
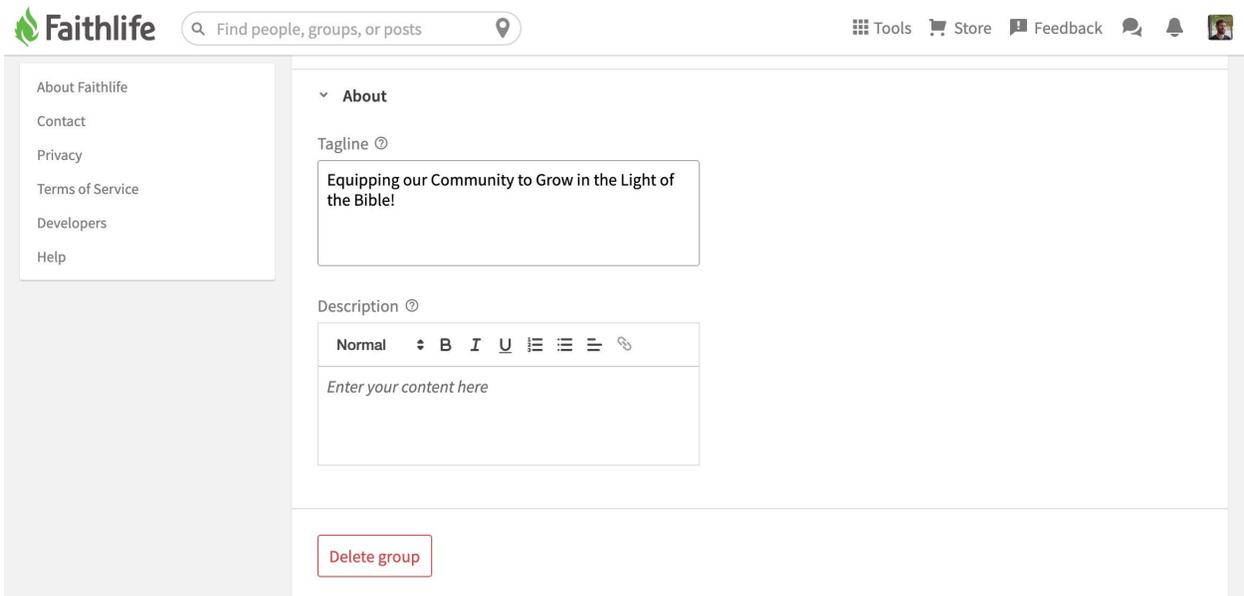
- **Tagline:** This provides a short description of the group that will appear under the group's name on its homepage (and on your Faithlife site's homepage).
- **Description:** Your group's About page will display the description you provide.
- **Denomination:** If your group is connected to a denomination, add it here.
- **Delete group:** If you need to delete your group entirely, select **Delete group**. Note that deleting a group permanently removes it from faithlife.com and is irreversible.

2. Configure Your Features & Permissions

Expand **Settings** in the left-hand **Admin** sidebar and select **Features & Permissions**. Here you can control the permissions for every aspect of your group: activity, calendar, members, group chat, content, Bible study, and discussions. For many of these sections, you can turn off their functionality altogether if that suits your needs.
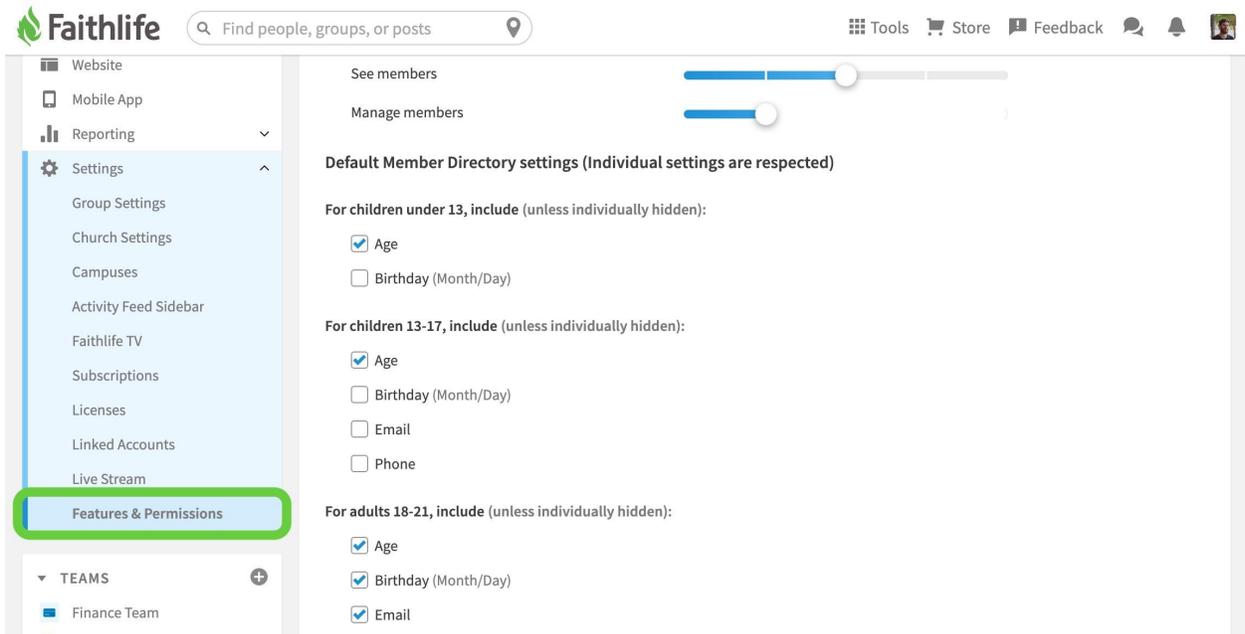
To change the permission levels for any particular setting, move its slider to your desired level.

- **Admins:** complete control over all group settings and actions
- **Mods:** maintain and manage the group
- **Members:** regular members of the group
- **Followers:** those with a Faithlife account who can read group posts without becoming members
- **Public:** anyone online with a link to your content

Learn more about roles in your church group in **Understand Roles in Your Church Group** section below.

Note: Certain actions are restricted so you cannot inadvertently extend this privilege too far. Others are more flexible and will require your active adjustment. For instance, you may want to limit participation in group-wide chats to admins and mods so that members in your church group cannot message your whole church. Under **Group Chat**, move the slider to **Mods** to restrict group-wide chatting to admins and mods.

For the calendar permissions, note that you can subscribe to an external calendar if your group already has a shared calendar online. Select **Subscribe to external calendar**, enter the calendar's URL (.ics only), provide the correct timezone, and click **Import**. Once the connection is established, your group calendar will auto-update to reflect your external calendar.

Invite Your Core Team

At this point, you may want to add to your group any other people who will be assisting you in setting it up by creating teams & subgroups, events, communications, managing your giving data, etc.

IMPORTANT: If you haven't already, this is the step where you want to start setting up the products you have access to through Equip, like Giving, Sites, and Proclaim. When you add staff to your church group, you'll be able to give them access to the products they'll use by assigning them to the appropriate team: Finance team for Giving, Presentation team for Proclaim, Website team for Sites, etc. You may also want to start adding events and communications in preparation for your congregation joining your group. You can find more help setting up these components of Equip at support.faithlife.com.

Understanding Roles in Your Church Group

Groups contain several different roles. Your role level determines the level of control you have over group content and settings.

- **Follower:** someone who has chosen to follow your group as an observer but cannot participate actively in it.
- **Member:** someone who can actively participate in the life of the group by posting on the group page, sending messages to others, and interacting with the group's content.
- **Moderator:** someone who can configure group settings and permissions.
- **Admin:** someone who can make changes to the group itself, invite new members, grant others the administrator status, and more.

Note: Admins of your church group can customize your group content permissions for each of these roles.

Your **church's congregants** should be **Members** of your group so they can do things like:

- Post prayer requests
- Connect to group reading plans and prayer lists
- View your digital bulletins and church calendar
- Access digital content your church has purchased for them

Your church staff should be Admins of your group or of teams in their respective areas so that they can do things like:

- Manage your online giving account

- Update your church's website
- Create digital sign feeds
- Send communications to your church
- Update your church's people records
- Manage your church's Faithlife TV channel
- Distribute purchased content (like books) to your members

Assigning Roles in Your Church Group

You can specify a role when you invite someone to your church group. As an Administrator of your group, you can also change people's roles through the **Directory** or from an individual's **Person Record**.

- From the **Directory**, click the menu icon at the far right of the individual's row, then select the role you want that person to hold within your group.
- From someone's **Person Record**, click the Group Role dropdown and select the appropriate role.

Your church members and staff have specific roles within your church group. However, they can have different roles within the different teams and subgroups that are a part of your church group. Roles do not necessarily trickle down. In other words, admins of your church group do not necessarily have access to all of the teams and subgroups. For example, an individual can be a group admin but not a member of the finance team and consequently not able to access your church group's financial data.

The Faithlife platform is designed to handle multiple users with different permission levels. This gives you the flexibility to assign and remove permissions as needed. For this reason, we strongly recommended that you *do not* use a shared admin login that multiple users have access to.

Set Up Your Teams and Subgroups

Your church group uses teams and subgroups to give you the organizational flexibility you need to manage your ministry areas, volunteers, and small groups.

In some ways, teams and subgroups are very similar. Both teams and subgroups are semi-independent Faithlife groups, with their own members, settings, permissions, and page. Posts made within a team or subgroup will not show up on the main group's page. And membership in a team or subgroup does not require membership in the main church group. To navigate to your team or subgroup, log in to faithlife.com and select it in the groups sidebar.

Teams and subgroups do have some distinct properties, and a clear understanding of the difference between the two will help you know when to use a team and when to use a subgroup.

How Teams Work

Teams are for specific oversight groups at your church and provide special permissions to team members to manage the church's website (i.e., Faithlife Sites), presentations (i.e., Proclaim Presentation Team), finances (i.e., Giving Finance Team), and more. Some teams (like your Presentation Team and Finance Team) are automatically created when you gain access to a certain Faithlife product.

Joining a team often grants team members special access to specific features or tools. For example, those in your presentation team can log into Proclaim to view, edit, and run your presentations and those in your Finance Team can view your church's giving data.

You can access any existing team by logging into faithlife.com and selecting it in the left-hand sidebar. You can also find it within your parent church group in the **Teams** panel on the left.

How Subgroups Work

Subgroups help smaller, specialized groups in your church connect. They're meant for smaller communities within your church and function as more intimate versions of your church group. You might set up subgroups for your youth group, weeknight Bible studies, etc.

Set Up Your Teams

As we noted earlier, some teams were automatically created for you when you signed up for Equip or for any of our standalone products. Those teams confer certain permissions to their members. You'll also want to set up teams for any other ministries in your church and assign the appropriate people to administer them.

Group Admins can create teams inside your parent church group. To create a team:

1. Navigate to your church group on faithlife.com.
2. Click the **plus icon** in the Teams panel.
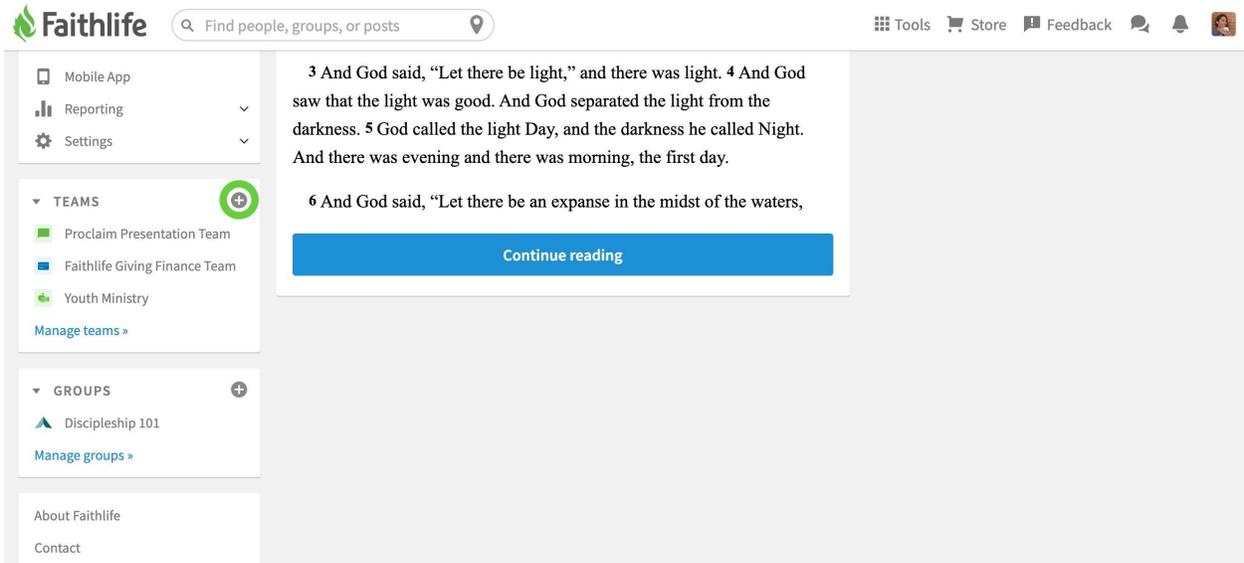
3. Choose any team(s) and click **Add**.

   You can search, sort, and filter the list to find a team type that fits your needs.
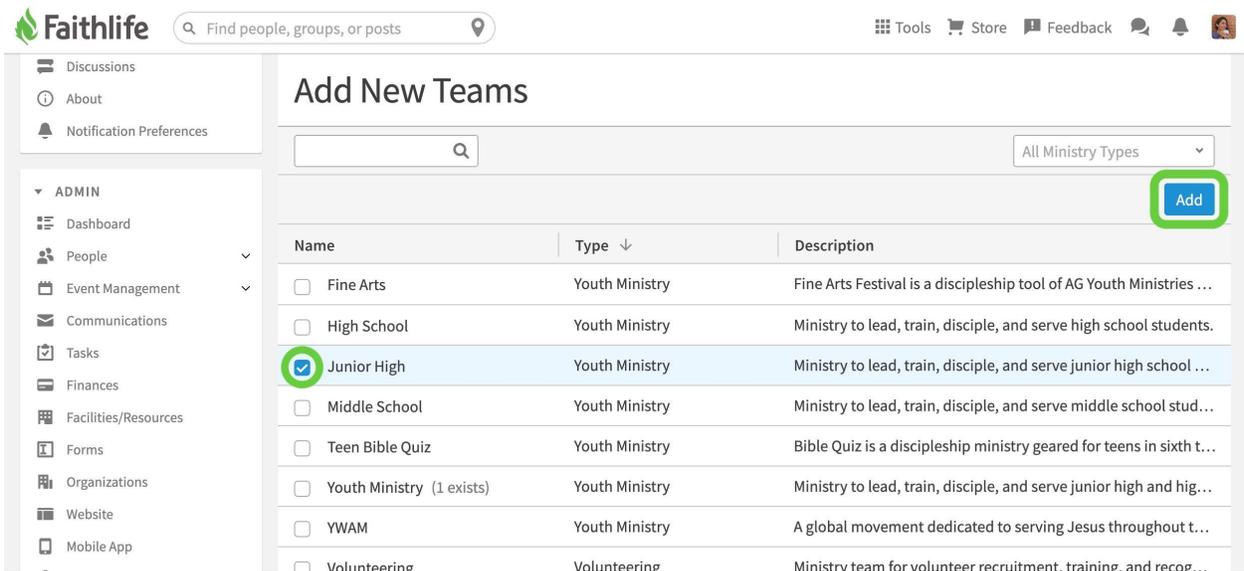
Any groups you've created are displayed at the top of the screen.

Create Subgroups

Group admins can also create subgroups inside your parent church group. To create a new subgroup:

1. Navigate to your church group on faithlife.com.
2. Click the **plus icon** ⊕ in the **Groups** panel.

3. Choose your subgroup type and click **Next**.
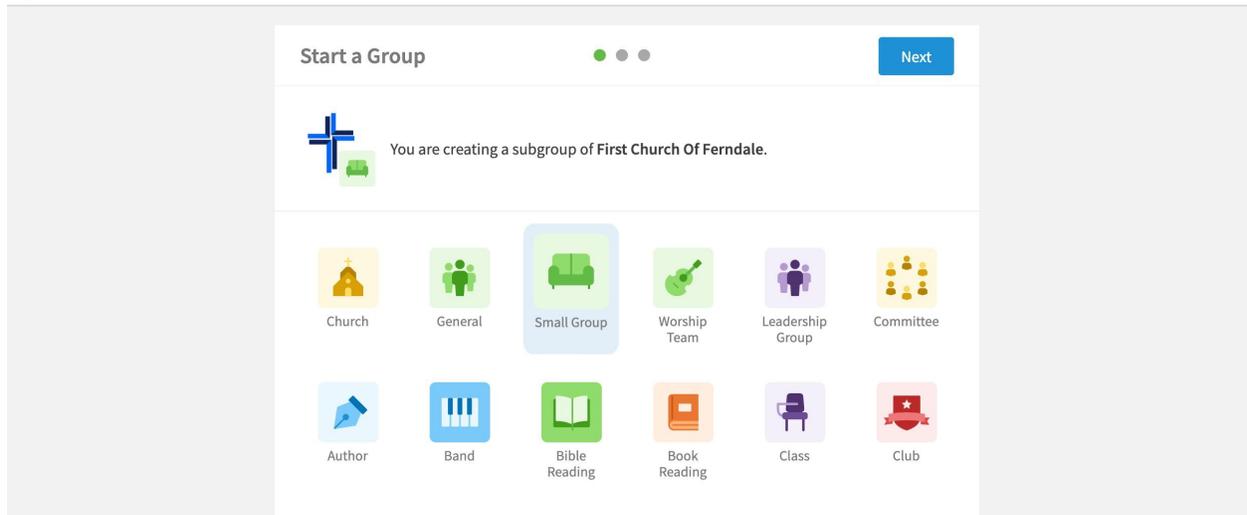
4. Add basic information for your subgroup.
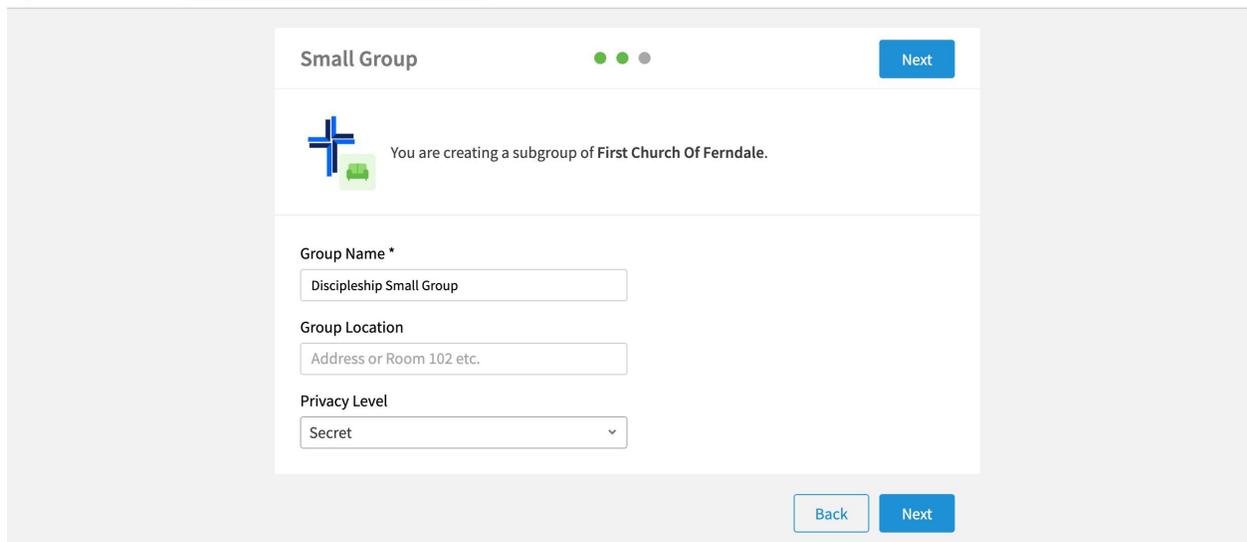
Set your group privacy to one of three levels:

- **Public:** Anyone can find and follow the group. You must be invited to become a member.
- **Private:** Anyone can find the group; depending on your selection, they can ask to join or join only upon receiving an invitation.
- **Secret:** New members must be invited. Nobody outside this subgroup can see it (including other Admins/Moderators of the parent church group).

Note: Remember, each group's privacy is independent, so you can set your parent church group to **Public** and your subgroup to **Private** or **Secret**.

5. Add optional group details.
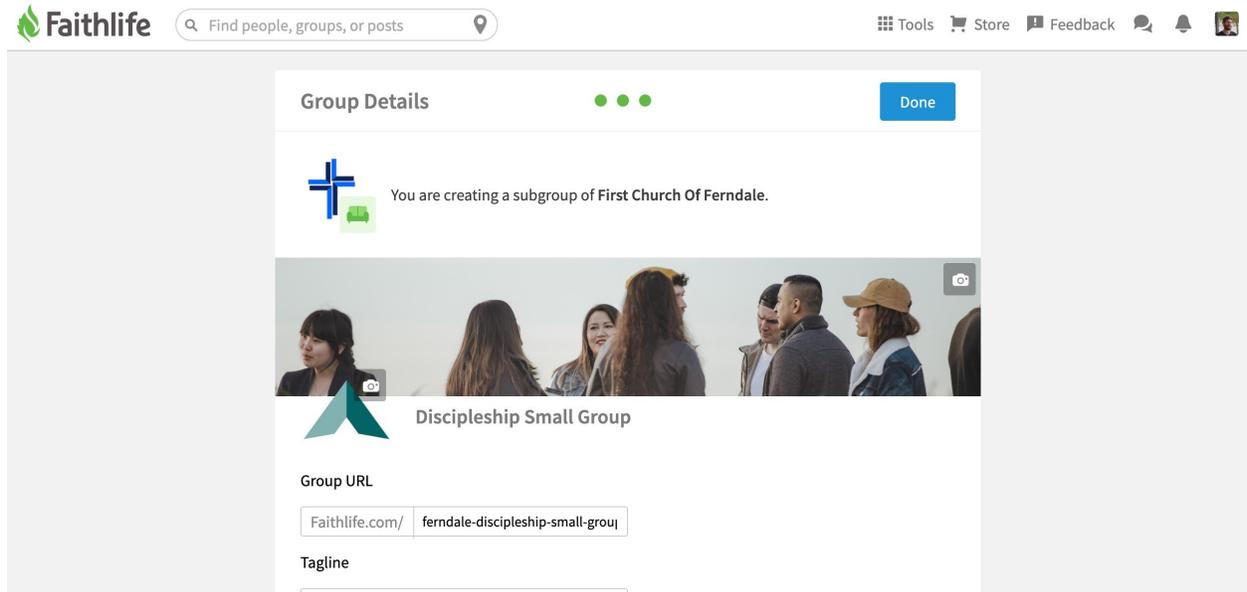
Provide a profile and header image and other option details below, including:

*   **Group URL:** your subgroup's direct link on faithlife.com (a default URL is provided, though you can change it).
*   **Tagline:** a short description of the group that will appear under the group's name on the homepage.
*   **Nickname:** a shortened name or abbreviation for the group.
*   **Group Email/Group Phone:** the organizer's contact information will display on the group's homepage.
*   **About:** the displayed info in the subgroup's About page.

After you click **Done**, your subgroup will be ready! Take some time to invite others so your subgroup can become its own community.

Inviting Versus Assigning—What's the Difference?

You can **invite** people to your church group or **assign** people to a team or subgroup. When you **invite** someone to join your church group, they receive an invitation. They're added to your group only if they accept that invitation. For subgroups and teams of your church group, you

can **assign** people, which adds people to the subgroup/team without their confirmation (as long as they already follow your church group or are a member of it). Assigning people makes it easier for you to onboard those who need access to specific permissions or communities within your church.

Login to faithlife.com and choose your group, subgroup, or team in the left-hand **Groups** panel.
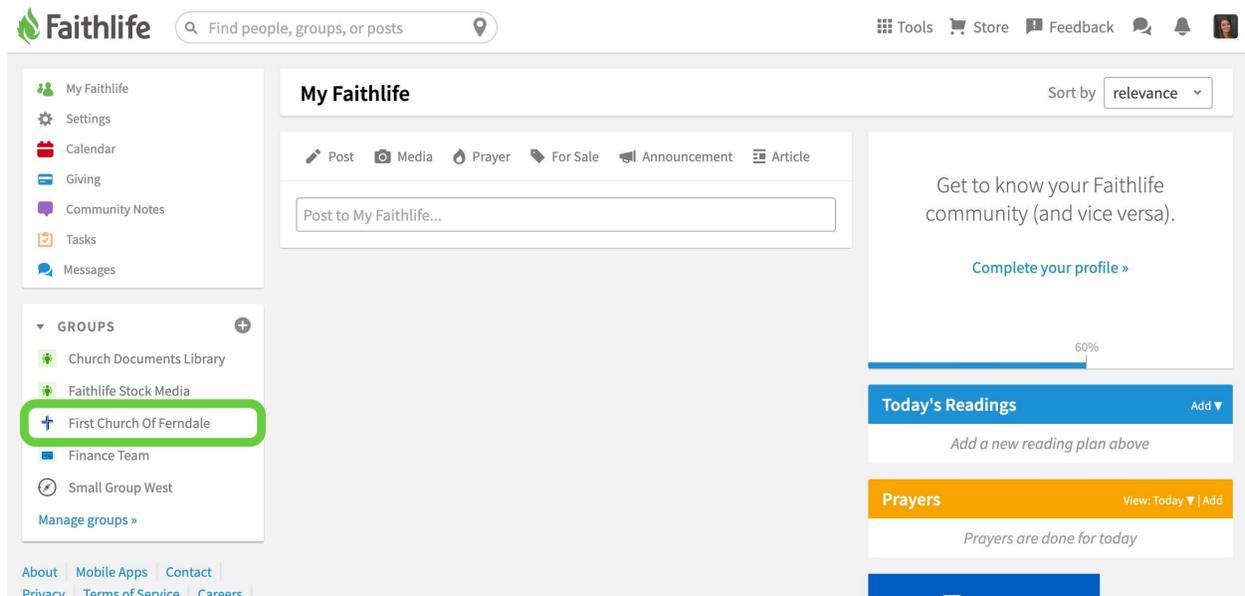
From here, you can send out invitations or assign team/subgroup members.

Invite People to Your Church Group

1. **Click** Invite.
   While viewing your church group, click the **blue Invite button** in the top right.

Note: For individuals in your group's **Directory** who have a listed email address but are not yet members, you can also click the **Invite** button on the row with the individual's information to send an email invitation to join your group.

2. **Choose your invitation level.**
   By default you will invite people as **Members**. To invite people as Followers, Moderators, or Admins, click **Members** and choose a different **Invite as** option (depending on your role in the group, not all of these options will be available to you).

A person's role in your group determines the level of control they have over group content and permissions. For a refresher on what different roles can accomplish in your group, refer to **Understanding Roles in Your Church Group** on page 22.

3. **Add invitees.**
   Type to add email addresses and then confirm your choice below in the dropdown. You can bulk add people to your invitation by clicking **Add contacts** and uploading a CSV file with email addresses in a single column. The email addresses in the CSV file will auto-populate the **To** field. Faithlife only imports email addresses from the CSV file. Any other data in the CSV file will be ignored.
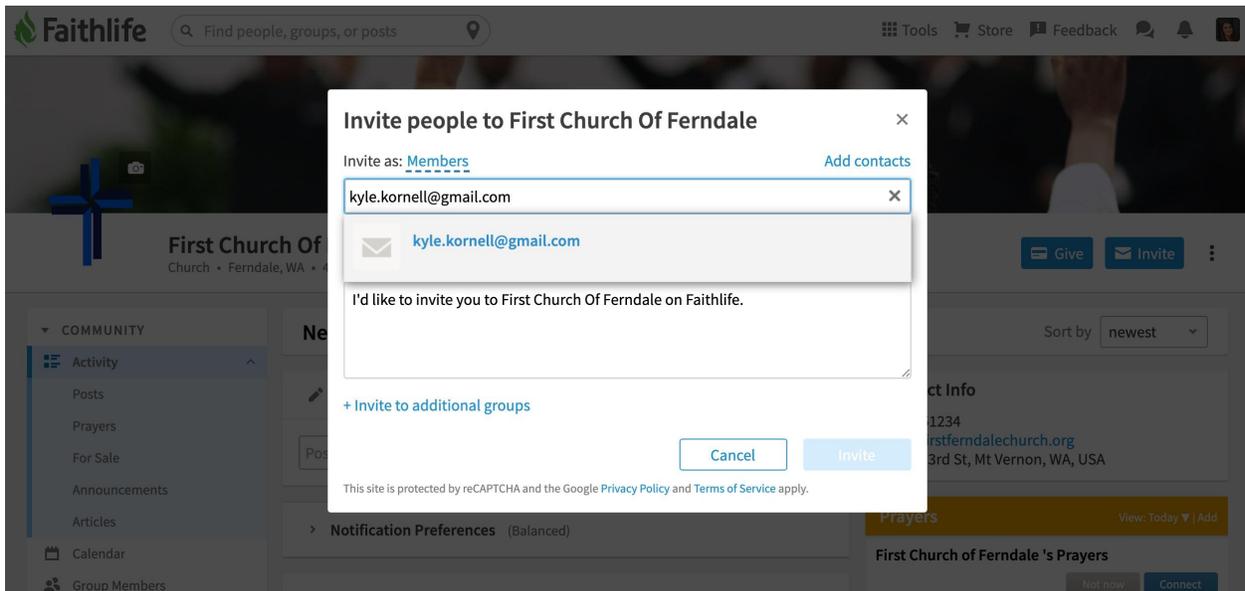

Note: You can invite people to join other groups, subgroups, or teams you have inviting privileges for using the **+invite to additional groups** option. This speeds up the invitation process if someone should belong to several groups you manage.

4. **Finalize and Invite.**
   Consider adding a personal note to give some context to the invitation, and click **Invite**.
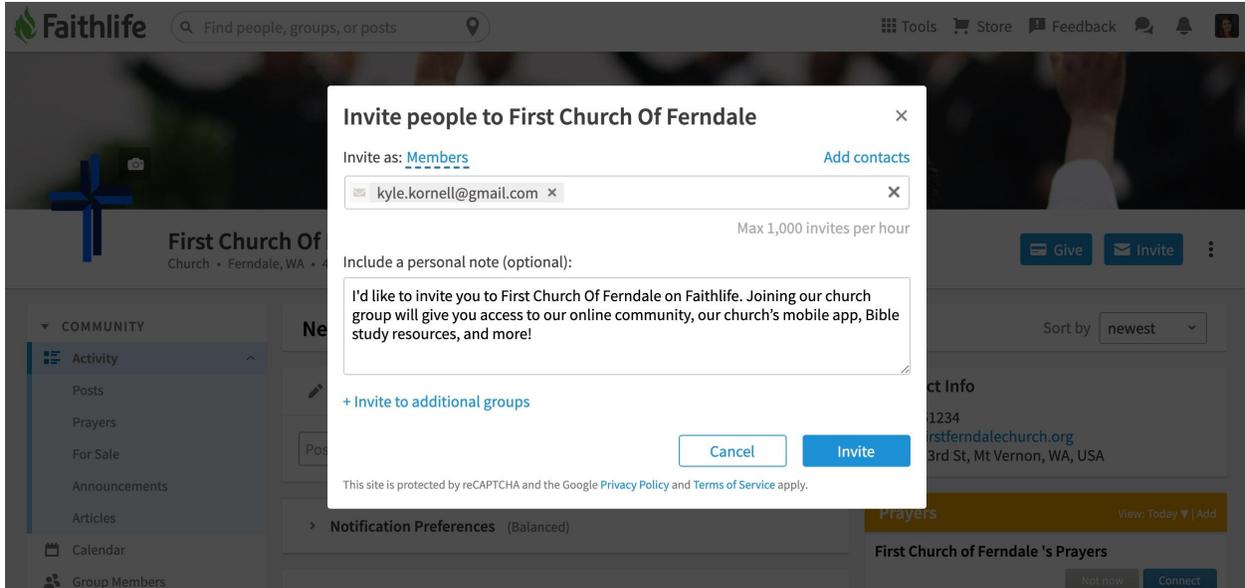
If invitees already have a Faithlife account associated with the email address, they can sign in and join your group. If they don't yet have a Faithlife account, they'll be prompted to quickly provide their name and a password to join your group and create an account at the same time.

To view someone's status in your group, select **Directory** in the left-hand sidebar. Admins can also view pending invites and send invites to anyone with an email address who is not part of your group.
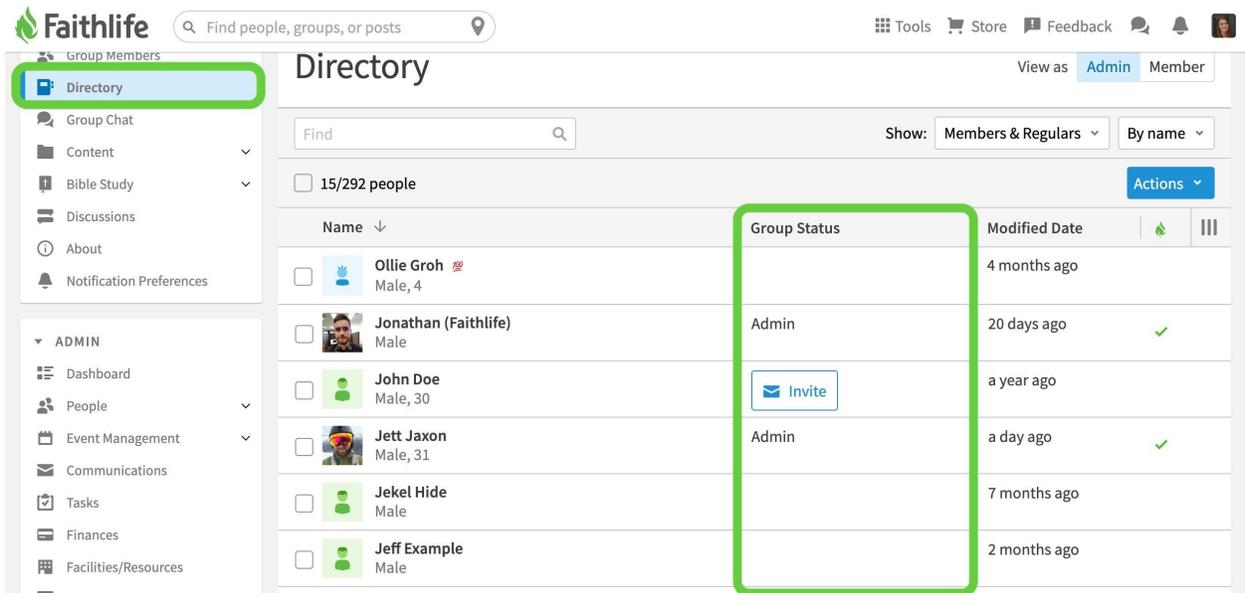
Note: To withdraw an invitation or change an existing person's status, select the person's row in your Directory, expand the **blue Actions button**, and choose **Withdraw Invitation** or **Change to … [Follower, Member, Moderator, or Admin]** respectively.

Assign people to any team or subgroup

You can assign people to teams or subgroups within your church group. Unlike invitations to your church group, assigning people automatically adds them to your subgroup or team (as long as they're already Followers or above in your parent church group). For this reason, it's usually best to invite people to your parent church group first and *then* assign them to subgroups and teams.

1. Click **Assign**.

   While viewing your church group, click the **blue Assign button** in the top right.

2. **Choose your invitation level**.

   By default you will invite people as **Members**. To invite people as Followers, Moderators, or Admins, click **Members** and choose a different **Invite as** option (depending on your role in the group, not all of these options will be available to you).

Again, for a refresher on what different roles can accomplish in your group, refer to **Understanding Roles in Your Church Group** on page 22.

3. Add invitees.

   We recommend searching for people by name, though this assumes they have a Faithlife account. As a general rule, it's usually best to invite people to your parent church group first and then assign them to subgroups and teams. This process makes it easier on you, as people who already belong to your church group can be added to subgroups or teams without additional confirmation on their part. To limit the search to people already in your church group, leave **Limit search to church** checked.
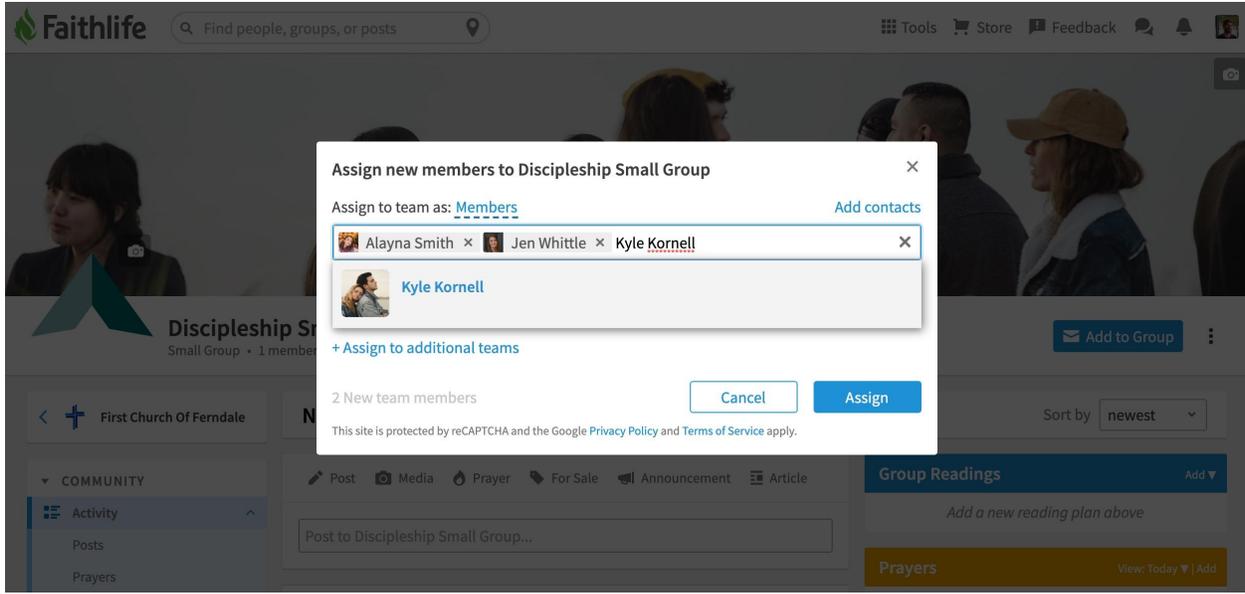
Note: You can also add people by email address or bulk add people to your invitation by clicking **Add contacts** and uploading a CSV file with email addresses in a single column. The email addresses in the CSV files will auto-populate the **To** field. Faithlife only imports email addresses from the CSV file. Any other data in the CSV file will be ignored.

If any assignee is not part of your parent church group, a second checkbox appears. Check **Send an email inviting your assignees to create a Faithlife account** to send an invite to your church group and (if necessary) create a Faithlife account. Some churches leave this unchecked when initially setting up their subgroups/teams so they can get people organized ahead of time before officially extending invitations. Checking this option also enables a personal message you can customize.
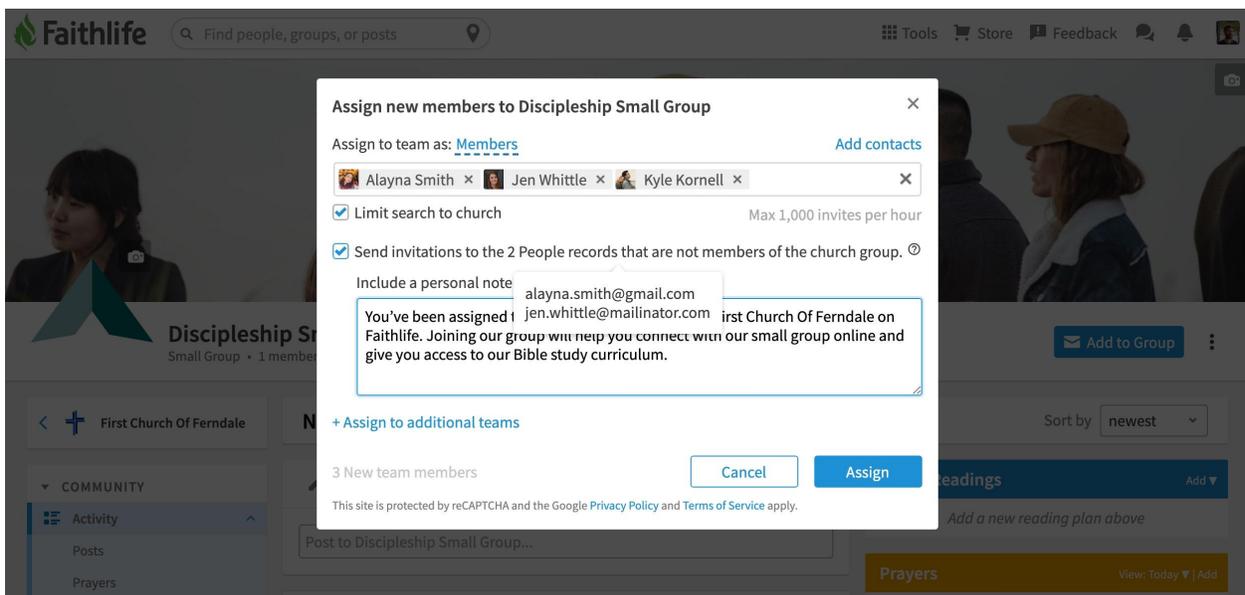
Note: You can assign people to multiple teams at the same time. Click **+Assign to additional teams** and choose another subgroup or team connected to your parent church group.

4. **Finalize and Assign**.

   When you're ready, click **Assign**. Depending on your selections above, one of the following will occur:

   - **Assignee is already a part of your parent church group:** the assignee will be added to your subgroup/team membership without confirmation.
   - **Assignee is not a part of your parent group:** the assignee will receive an email inviting them to create a Faithlife account (if necessary) and join your parent church group. Upon accepting the invitation, they will be added to your subgroup/team without additional confirmation.

   Note: The options above assume you've checked **Send an email inviting assignees to create a Faithlife account** for any assignees who are not a part of your parent church group. If you leave the option *unchecked*, these assignees will *not* be notified but a record will be created in both the subgroup/team and the church group. You will then need to officially invite/assign people from the Members section of your subgroup/team at a later time.

   To view someone's status in your subgroup/team, select **Members** in the left-hand sidebar.

Note: To change an existing person's status, withdraw an invitation, or remove someone from your subgroup/team, select the person's row in your Members section, expand the **blue Actions button**, and choose your desired action.

STEP 3

Set Up Products and Content

If you haven't already, this is the point where you want to focus on getting your key products set up and your key content created. It's not necessary that you do this before inviting your congregation, but it's helpful if you do. For example:

1. Your giving form will be active and available to your congregants when you join.
2. You'll be able to assign volunteers to teams like your website or presentation teams.
3. Your congregants will see events on your church calendar.
4. You can set up a newsletter to be automatically sent to individuals when they join your group.

Set Up Giving, Sites, and Proclaim

For more information about setting up Faithlife Giving, Sites, Proclaim, and other products, visit the Faithlife Help Center at support.faithlife.com.

Add Events to Your Group Calendar

You can add events to your Faithlife Calendar from the Calendar tab in your faithlife.com group. Events you create will automatically populate in your website's calendar.

If you're already using an external calendar, you can import that calendar to your group so any changes on the external calendar will populate to your group's calendar.

Create an Event

1. Select **Calendar** in the left navigation menu.
2. Click **New event** in the top right-hand corner of the webpage.
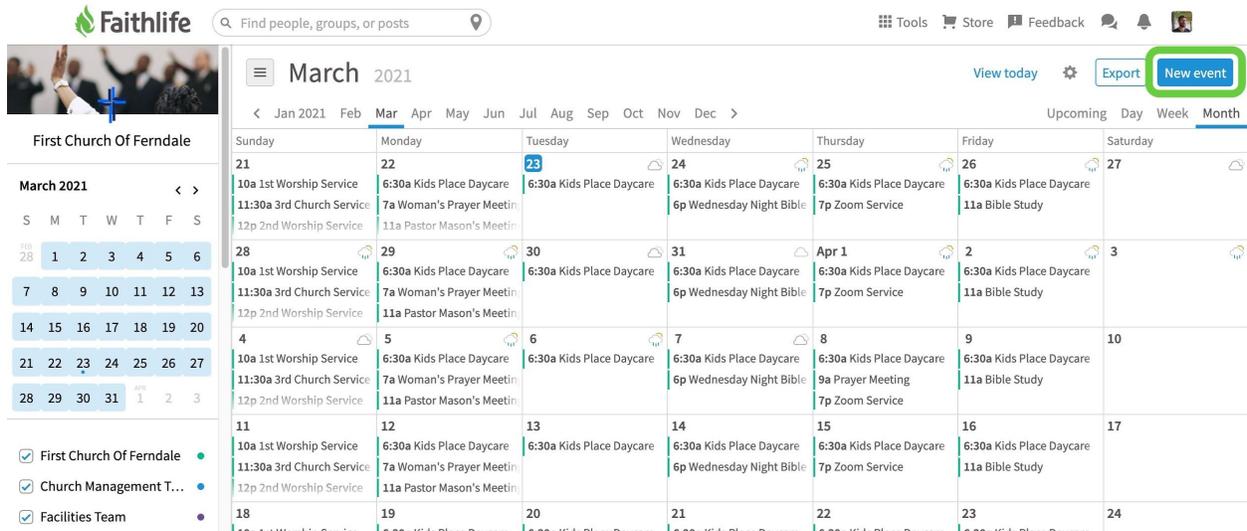
3. Add the event **as yourself** or **as group** to indicate who created the event
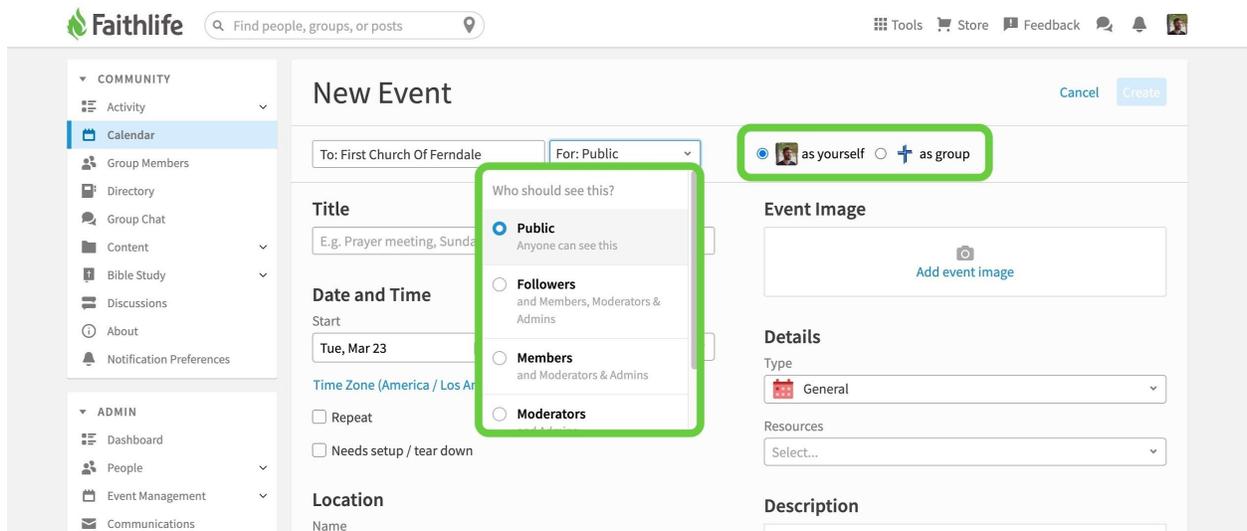
**Note:** The publicity of your calendar displays above your event (e.g., "To: Public via Sample Church" above). An administrator can change the publicity of the calendar from the group's settings.

- To: **Public** via Your Group—anyone with a faithlife.com account can see your events if they view the group's calendar.
- To: **Followers** of Your Group—anyone who follows your group can see your events if they view the group's calendar.
- To: **Members** of Your Group—anyone who is a member of your group can see your events if they view the group's calendar.

4. Add your event's details.
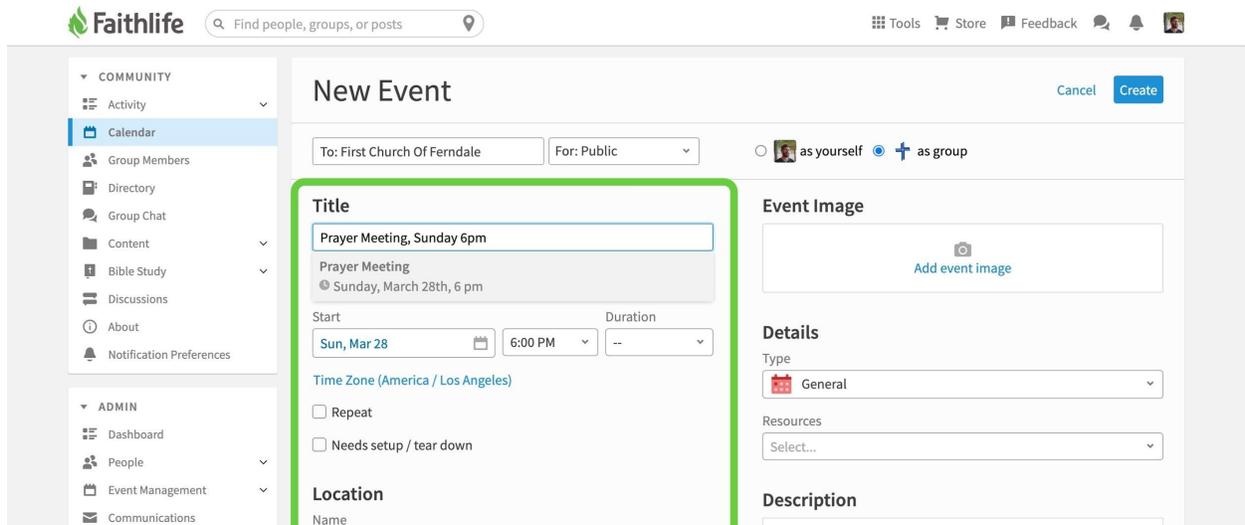
Note: You can add the details as a normal sentence and your calendar will parse the language for you. For example, type "Church Picnic 1:00–4:00 p.m. next Sunday at Community Park. Please RSVP and bring a side dish" in the Title field, and your calendar will add the event details for you. You can set up an RSVP by following the instructions below. Consider clicking the camera icon to add an image for your event (minimum width: 600px).

5. Select the **Event Type**.

    Setting event types helps you organize your calendar. If you're wanting to create subgroup-specific events, add them to the subgroup's calendar and anyone in the subgroup will see all available events.
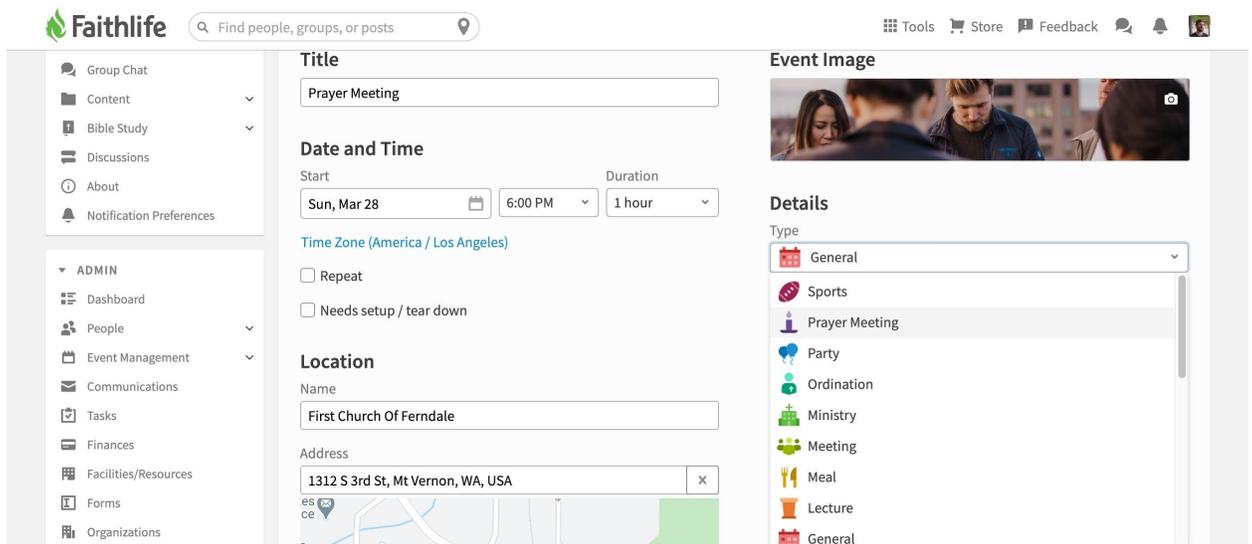
Example: If you need to add an event that only applies to your small group, navigate to the subgroup and add the event to the subgroup's calendar. When members of your

small group view the main church calendar, small group events will also display for them.

6. Click **Create**.

    The event will post to your calendar and your group's newsfeed. You will be directed to an event page with all of your event's details.
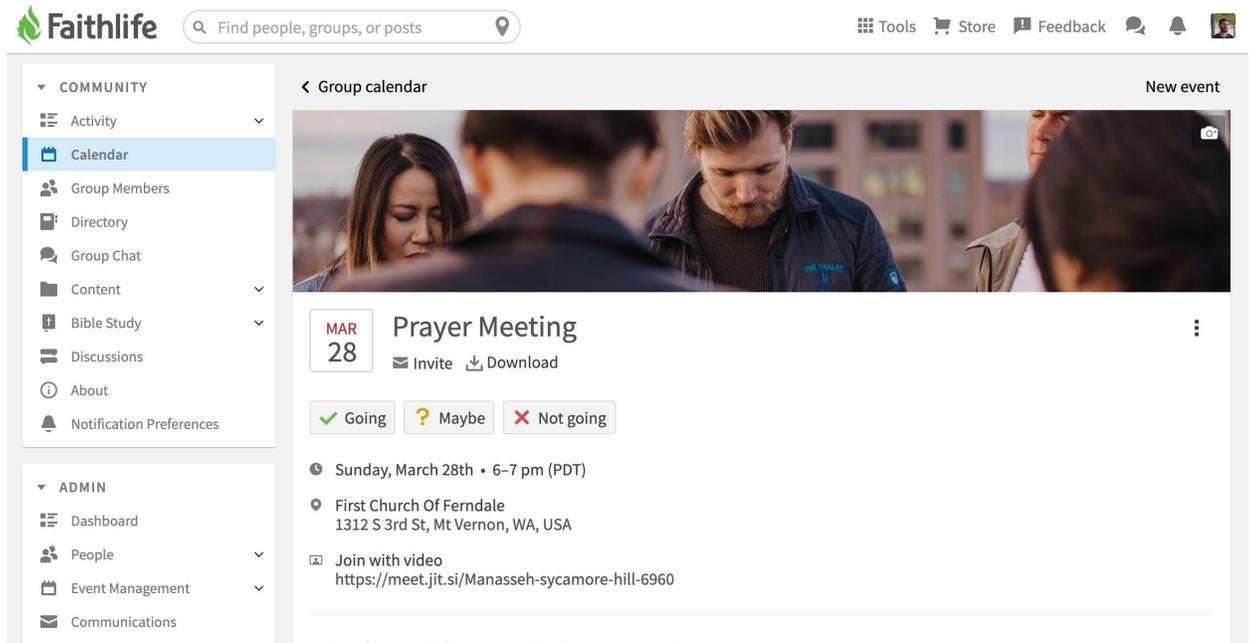
If you have a Faithlife site, the event will auto-publish to your site as well.

Additional Event Options

Faithlife calendar events can include several additional advanced options: repeat schedules, setup/teardown, resource reservation, RSVPs, and promotions.

Repeat Events

If an event repeats, you can set any repeat option when creating the event.

1. Check **Repeat**.
2. Select from the repeat schedule options (the **To** dropdown) or create your own.

   A live readout next to the repeat check will indicate your chosen option.

   Custom options can be configured in a variety of ways. For example, every other week on Tuesday, Thursday, and Saturday.

3. Set a repeat end.

   Any future events will display below to give you immediate feedback.

Needs Setup / Teardown

If an event requires setup or teardown, check the option to set times for each.
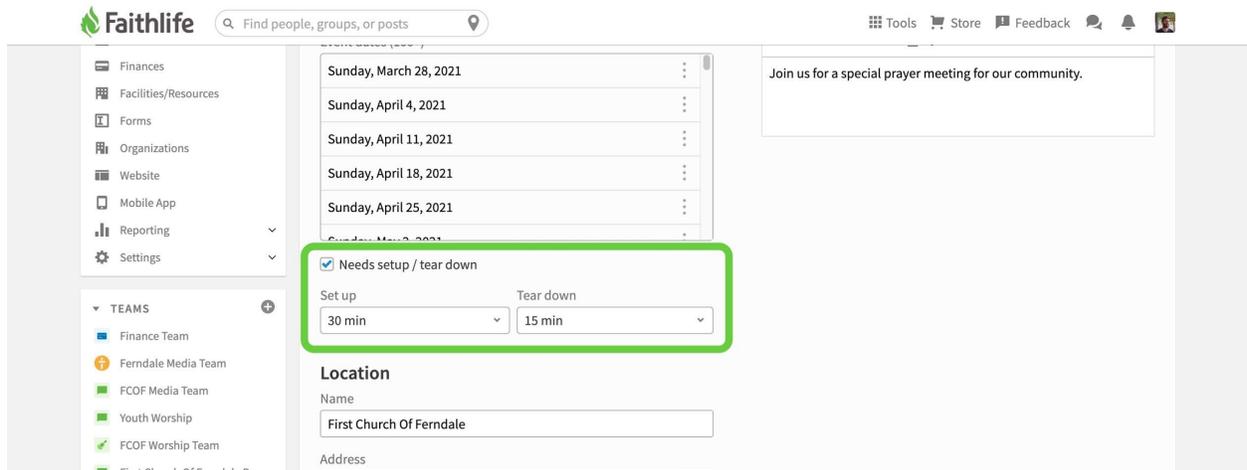
Marking a setup/teardown time will ensure any resources you select for the event will be available during setup and tear down.

Reserve Resources

You can reserve resources from the dropdown menu. If you need a resource that is not yet in your system, click **+ Add another resource**. You can manage all your resources by clicking **Facilities/Resources** in the left-hand **Admin** navigation panel.
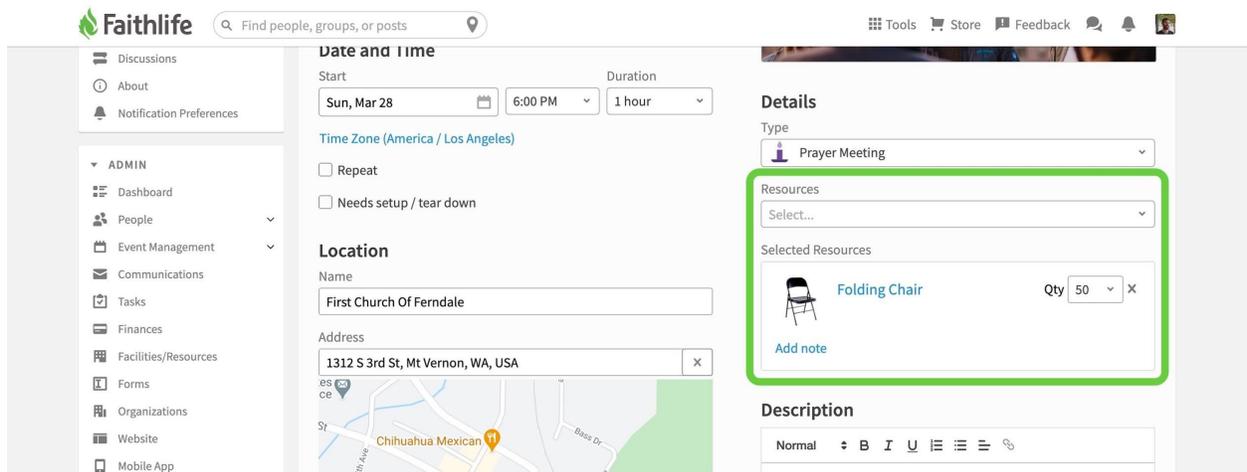
After selecting a resource, select the quantity you'd like to reserve. Add a note, if applicable, by clicking **Add note** and entering text.

RSVPs

To add RSVP to your event, move the slider to **Yes**. Check **Disable RSVP after** to set a final RSVP date. Check **Allow guests** to let those attending indicate how many guests they will bring.
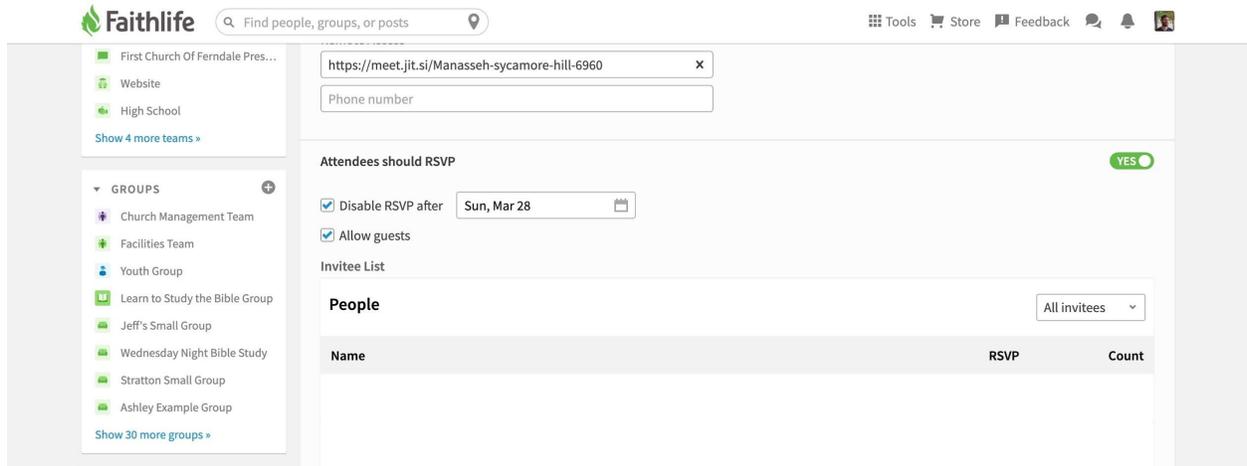
When the event posts, it will include an RSVP selector. As attendees click **Going**, they will have the opportunity to add total guests attending.
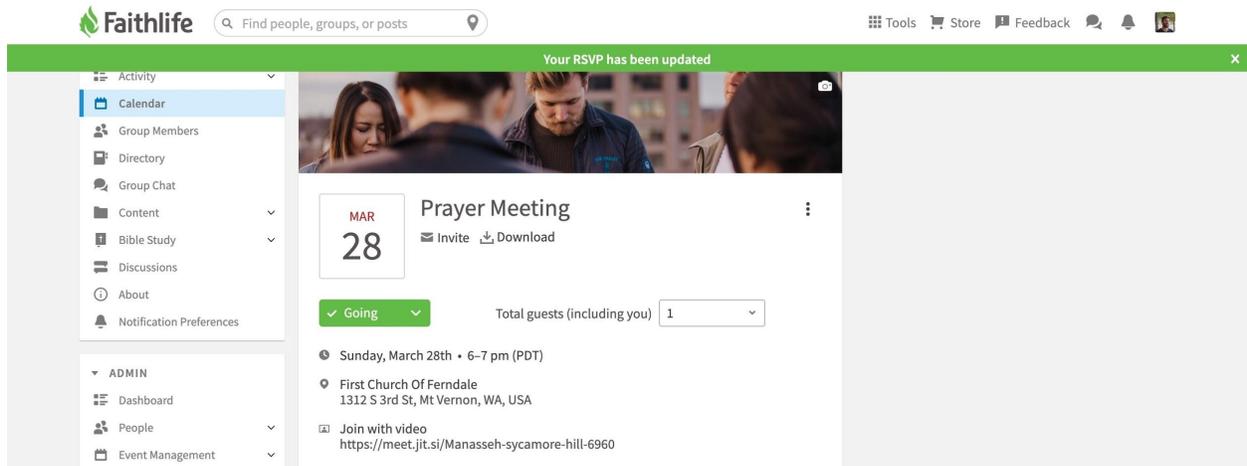
Selecting the event will show those who have RSVP'd. If you are an admin or a moderator, you will also see a total count. To filter the list, select an option from the dropdown.
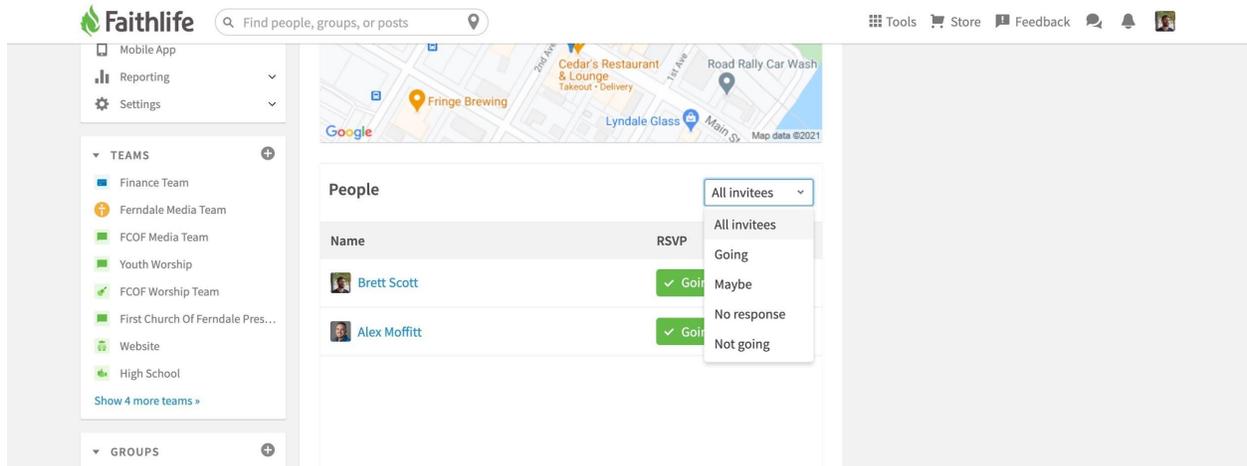
Add Content to Your Group

As a group admin, it's important to help educate your people so you can get the most out of your group. When people join your church group, there are two helpful ways to welcome your members and introduce them to your group's features and content: pin a welcome post and/or schedule an automated newsletter.

Pin a Welcome Post

It's a great idea to pin a welcome post to your group's activity feed to welcome your members. To get started, log in to faithlife.com and select your group from the left-hand sidebar.

1. Select a post type.
2. We recommend choosing **Post** or **Article**. The Article post type provides the most customization options. Write a welcome message and help your people get oriented.

   Note: If you are an Admin in your group *and* you have a Faithlife site, posting an article will simultaneously publish a blog article on your blog widgets unless you configure the widget to only show content from certain accounts.

   Here's an example using the Article post type.
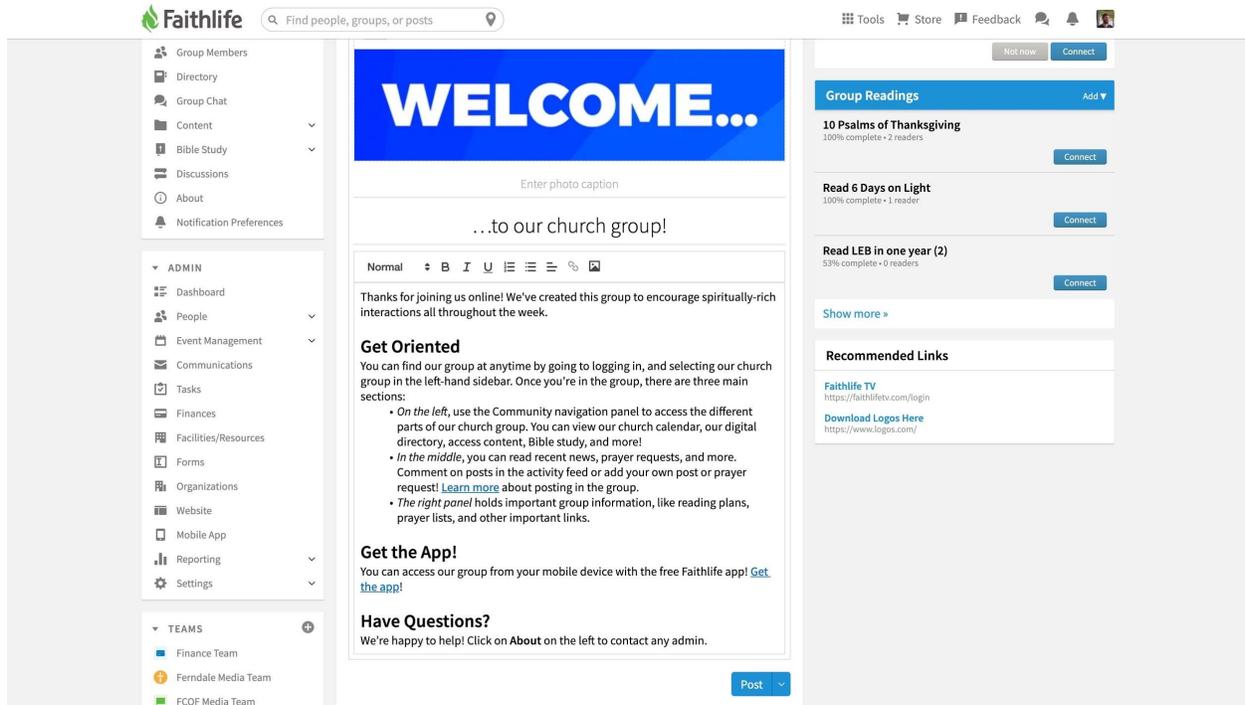
2. Set your post visibility.

Your post will use your group's default **Read the activity feed** privacy permission. Many church groups set this level to "Public" so people visiting the group online can get a sense of your online community without needing to join. You can always set visibility for your specific post via the dropdown. For this welcome post, set the visibility to **Members**.
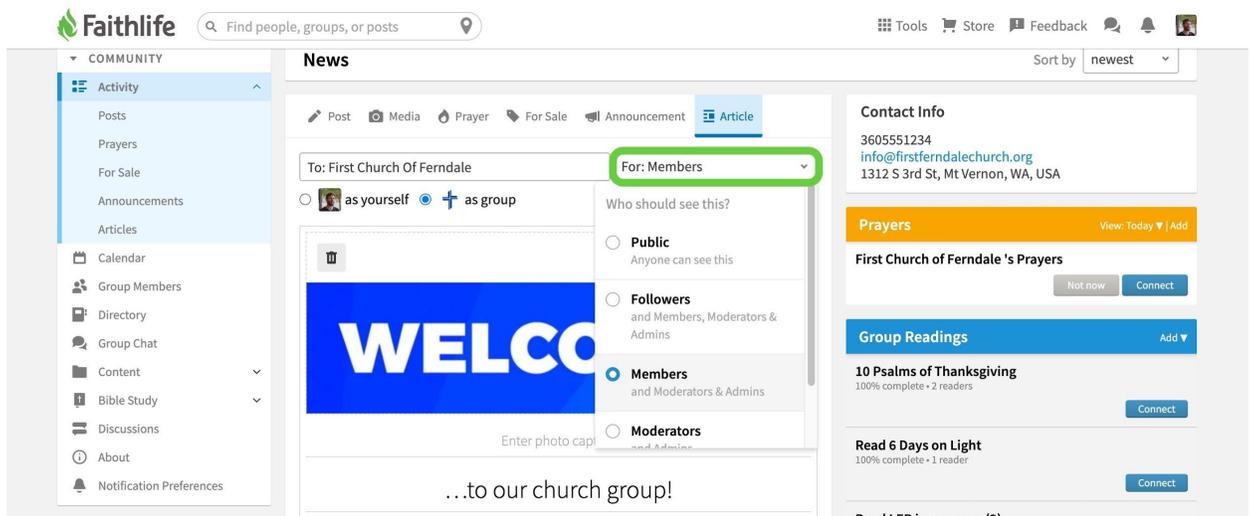
Note: Group Admins can change the default activity feed permissions from the **Group Settings**.

3. Choose the posting account.

As an Admin, you can choose to post with your personal Faithlife account or as your group. Select the option that works best for your needs.
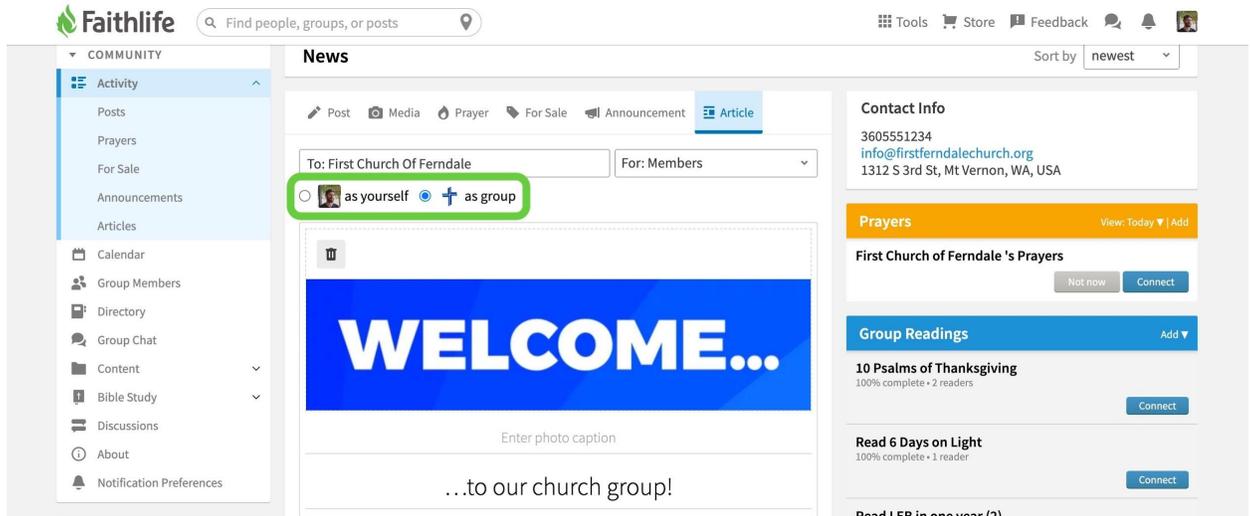
4. Post and pin the post.

When you're ready, click **Post**. Once it's posted, click the **down arrow** ⌄ on the post and choose **Pin post** to pin it to the top of your newsfeed.
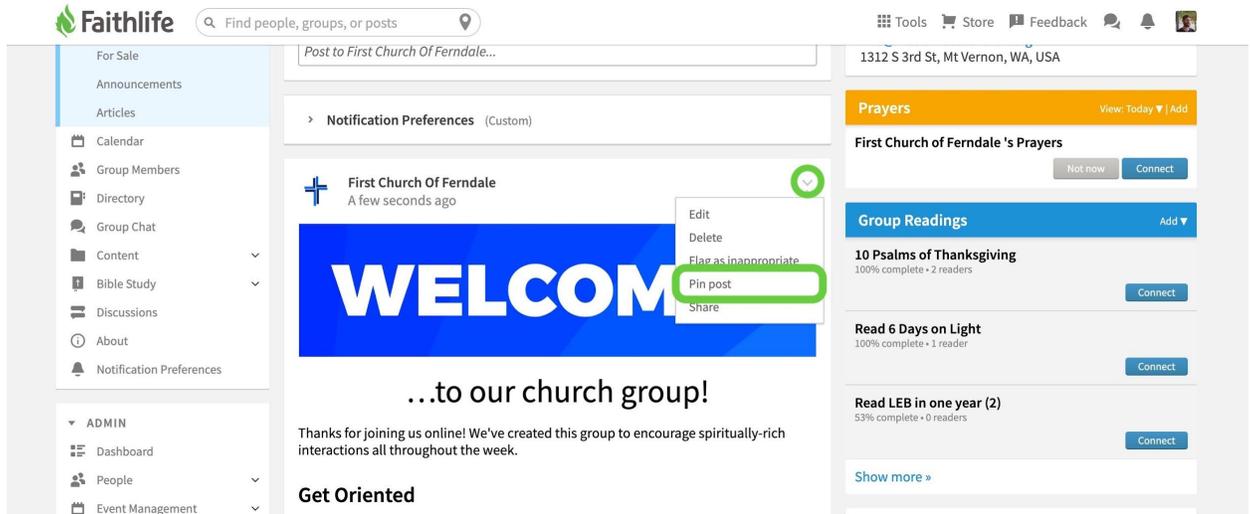
Any member who visits your group will see the post at the top of the Activity feed.

Note: You can update and edit the post at any time from this same dropdown menu. Click **Edit**, update the post, and save your changes.

Schedule an Automated Newsletter

Your church group includes a drag-and-drop email newsletter. Expand **Content** in the left-hand panel and choose **Newsletters**. Click **Create Newsletter**.

1. Add content to your newsletter.

   Create your welcome newsletter to fit your needs. Add sections by dragging them from the right, adding text, pictures, and any other media that fits your needs.

2. Choose the publish account.

   On the right, choose between publishing the newsletter using your personal profile or as the group.

3. Schedule your newsletter.

   Click **Immediately** under **Scheduled For** on the right and select **Upon joining group** to set this newsletter to send when people join your group. Click **Done**.
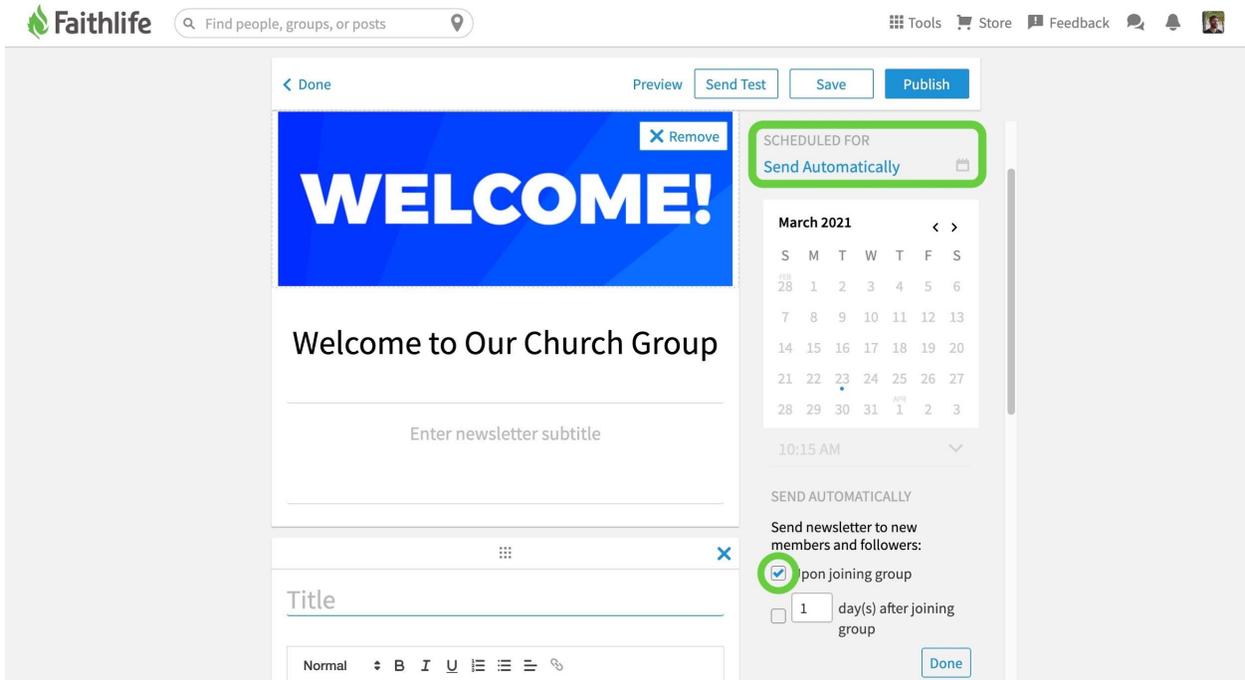
Note: Notice that you can also set additional schedule options. For instance, you can create a second newsletter to go out 3 days after someone joins to encourage them to post to your group and introduce themselves and another newsletter a week later linking to and explaining your church calendar, a group Bible reading plan, your church's Faithlife TV channel content, and more!

4. Publish your newsletter.

   With your content set and your newsletter scheduled as an autoresponder, click **Publish**.

   Note: You can test the newsletter experience first by previewing it or sending a test email to yourself.

   Faithlife will send your newsletter automatically to each person who joins your group. Statistics for your newsletter appear in the main **Newsletters** menu. You can also edit the newsletter by selecting it.

STEP 4

Add Your People Records

Faithlife provides a robust tool for managing information about your people that also integrates with everything else you're already doing with Faithlife: people records. Each person record is created, owned, and managed by your church and enables you to serve and encourage every individual into growth.

What Are People Records?

People records are created, owned, and managed by your church group admins. In other words, they're *administrative* records about people connected to your church.

Example: If you meet someone Sunday, you can add them as a new connection (see below) and a new person record will be created. If you follow up with an email or a text, Faithlife adds it as an interaction on their record. As they continue in their faith journey, your staff can intentionally connect with them and keep track of those touch points. During this time, your visitor will *not* receive an email inviting them to your Faithlife group or even know that you're adding notes about your care for them. Adding their person record simply helps your church staff track their ministry to people.

To view existing people records, go to your Faithlife group and click **People** in the **Admin** panel.

Person Record or Faithlife Profile—What's the Difference?

People records are your church's administrative records about people connected to your church. Your church creates, owns, and manages those records and they exist whether or not the person has a Faithlife profile or has joined your church group on faithlife.com.

If you create a person record, it requires a second step to invite that person to join your church group on faithlife.com. Learn how to invite someone to your group from their people record.

A **Faithlife Profile** is created, owned, and managed by an individual. You can find your own profile in the top right-hand corner of your browser. When you click your Faithlife Profile avatar, you can customize your profile from the **Account Settings** dropdown option.
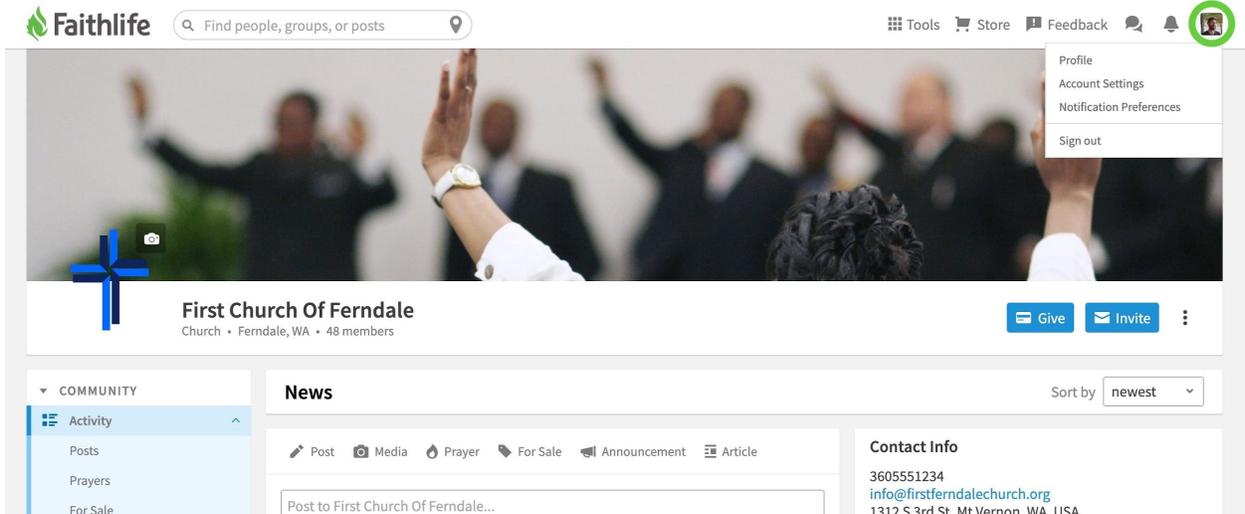
If you invite someone to join your church group on faithlife.com, we automatically create a person record for you in the admin panel, since your church wants to minister to them. In their account settings, they can choose to share their profile information with your church group, to make it easier for you to fill out their person record. In fact, each time a person updates their account settings, you can choose to review the changes and update their person record in the admin panel.

Import Your People Records

You can upload your people records to Faithlife using a .csv file. Here's how.

Export your .csv file from your old system

Your exact exporting steps will vary depending on what system you previously used to manage this data. If given the option, export your csv with:

- individual records (instead of family records)
- a header row
- one item per column (for example, first and last names should be different columns)
- all of the data you want to move into Faithlife (Faithlife will create a custom field for any types of data that it doesn't have a predefined field for)

Make sure to select .csv as your file type for export.

Check your .csv file

The Faithlife platform is designed to interpret and import your .csv file. While the import process should require minimal work, there are a few things you can do to help avoid data issues. Generally speaking, it's better to clean up your data *before* you import.

1. Open your .csv in a spreadsheet application like Microsoft Excel, Google Sheets, or Apple Numbers.
2. Make sure that the column names match the data in the columns (e.g., that phone numbers appear in the "Phone Number" column).
3. Check to ensure that you have one item of data per column. For example, "Age 28, July 9, 1989" contains both an age and birthdate. Instead, you want those two pieces of information represented in two columns, one for age and one for birthdate.
4. Disambiguate names. If your .csv file does not have a "family" column, and if you have more than one family with the same last name, add a number in the last name column (e.g. "Smith 1"). Otherwise, the Faithlife platform will treat everyone with the same last name as members of a single family.

Import your .csv file to your group

1. Navigate to your church group on faithlife.com.
2. Go to your **People** tab.
3. Click the **more options** icon ⋮ , then select **Import from CSV.**
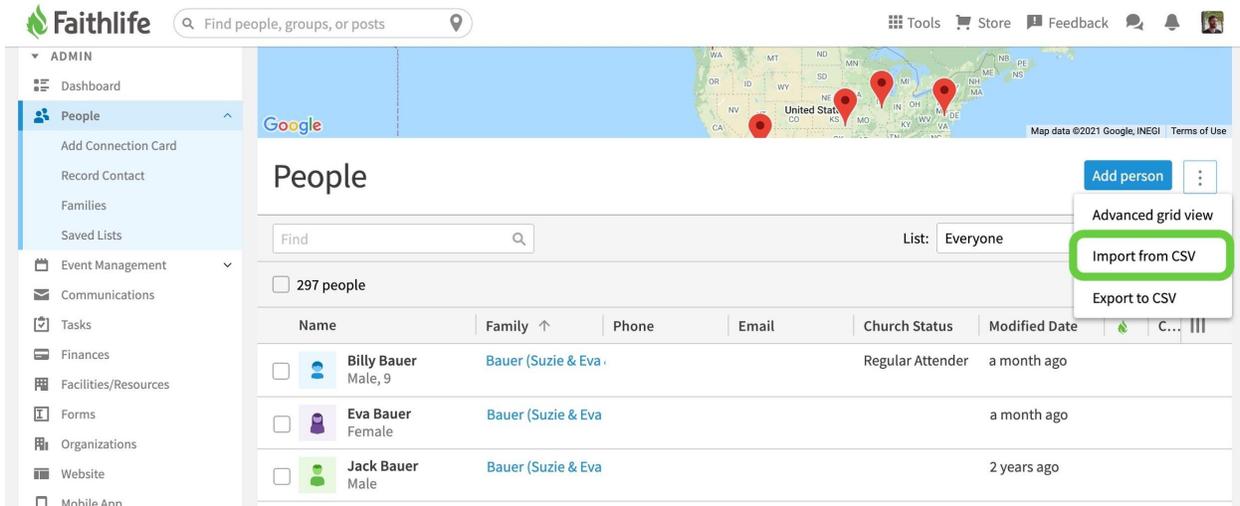
4. Select the .csv file you exported. A window will appear with three columns.
   - The first column displays column names from the first row of your .csv file.
   - The second column displays the corresponding field on the Faithlife platform.
   - The third column displays the type of data corresponding to each column.
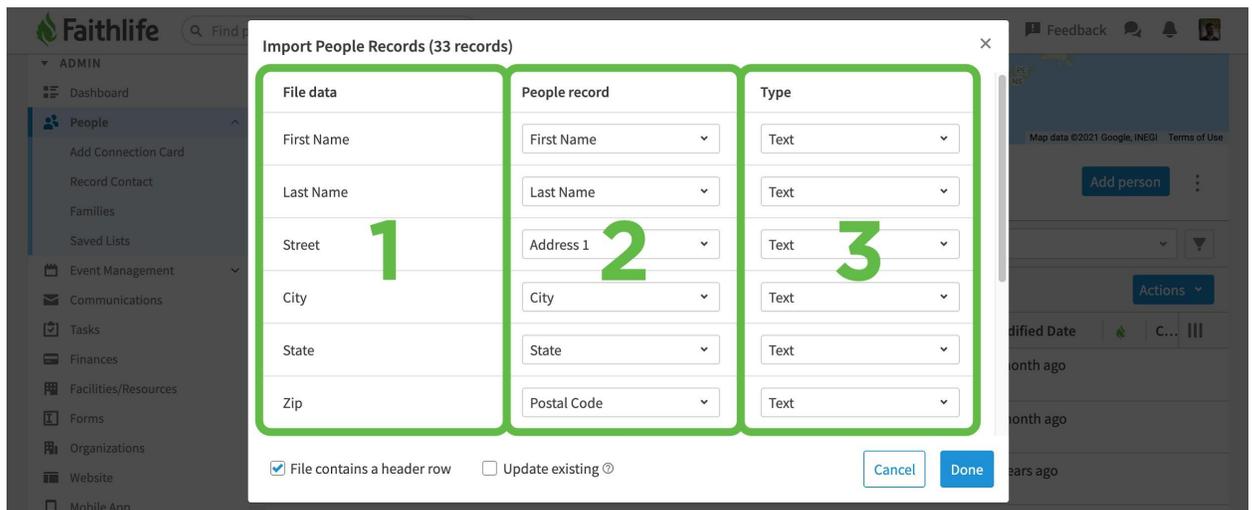
5. Ensure that the first and second columns match as closely as possible. For anything you can't match, select **Notes** in the second column. <u>Do not leave empty rows in the second column</u>. If you do, that data will not be imported.
6. Check the data types in the third column, and make sure they correspond to the first and second columns—for example, that email addresses are correctly designated with the email address data type.
7. Check or uncheck **File contains a header row.**

8. Check or uncheck **Update existing**. If you leave this checked, the system will search for corresponding people records and override them instead of creating new ones (the system will ask you to confirm the changes).
9. Click **Done**. It may take a few moments for the system to process all of the data—do not press **Done** more than once. When it's ready, your people records will appear in the People area of your church group.

STEP 5

Invite Your Congregation

Now that you've set up your group and added your data, it's time to invite your people to connect with your group. At this point, it's a good idea to take some time to sketch out a plan of how you want to invite your people, encourage buy-in, and engage slow adopters.

Depending on how you want to go about rolling out your group to your congregation, you may want to invite specific individuals before inviting your entire congregation.

Here's how inviting works:

Admins or Moderators of your church group can invite individuals or multiple people at once through your people records, as long as those records have email addresses associated with them.

To begin, go to faithlife.com, sign in, and select your group in the left-hand **Groups** panel. Scroll down and click **People** to view your People Records.


Invite Individuals

Click the name of the person you want to invite to your group to view their Person Record. Two dropdowns display below the person's name.

- The first dropdown shows a person's church status (your internal description of their connection to your church).

- The second dropdown shows a person's group status (their role in your Faithlife group).

Expand the second dropdown (for Group Status) and click the **Invite** option. Choose a role and include an optional message, and click **Invite**.
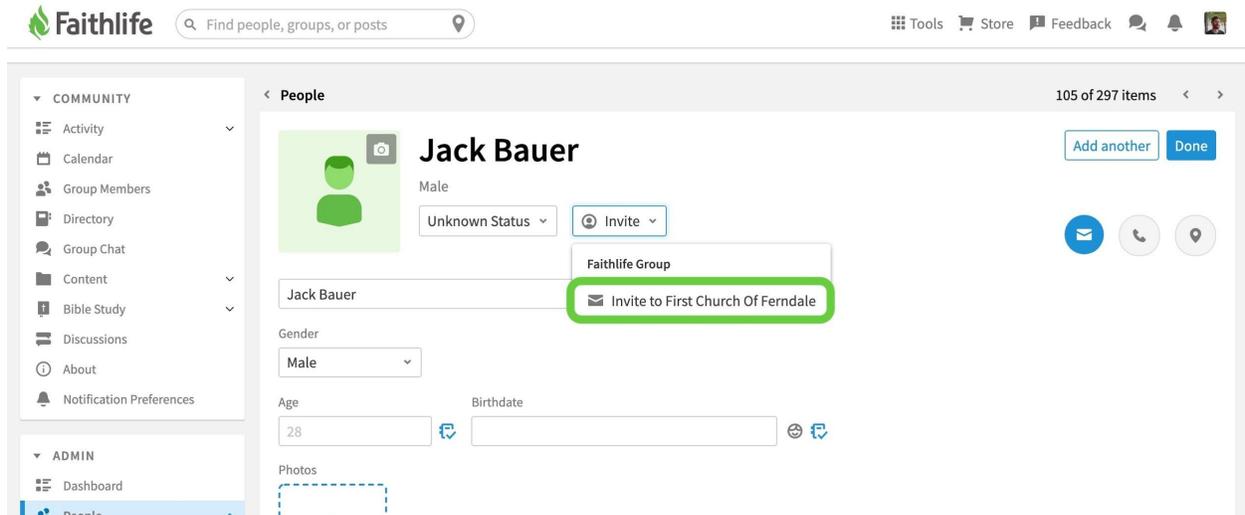
Bulk Invitations

Check the boxes besides the people you want to invite. (You can do this one by one, or you can filter your records to only show church members and regular attenders, then select all the resulting entries.)

When you're finished making your selections, click the **Actions** button above the People Records table and choose **Invite to Faithlife group**. The number in parenthesis shows how many people you're inviting to your group.
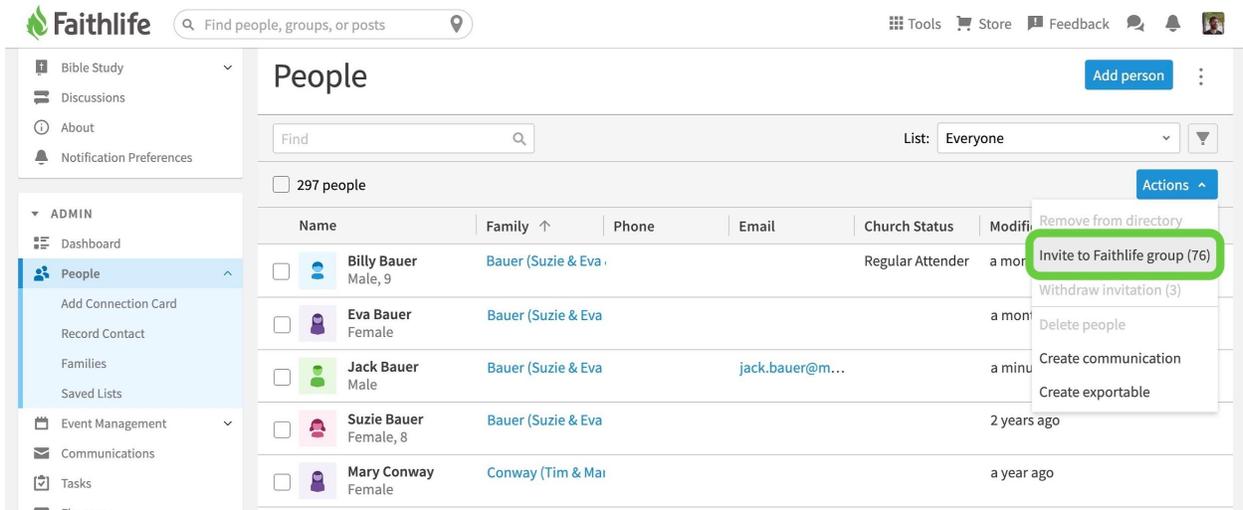
By default, Faithlife will invite them as members, but you can change the invite type by clicking "members" and choosing another option. Finally, consider adding an optional message to give some context to your invitation. Click **Invite** to send the invitations.
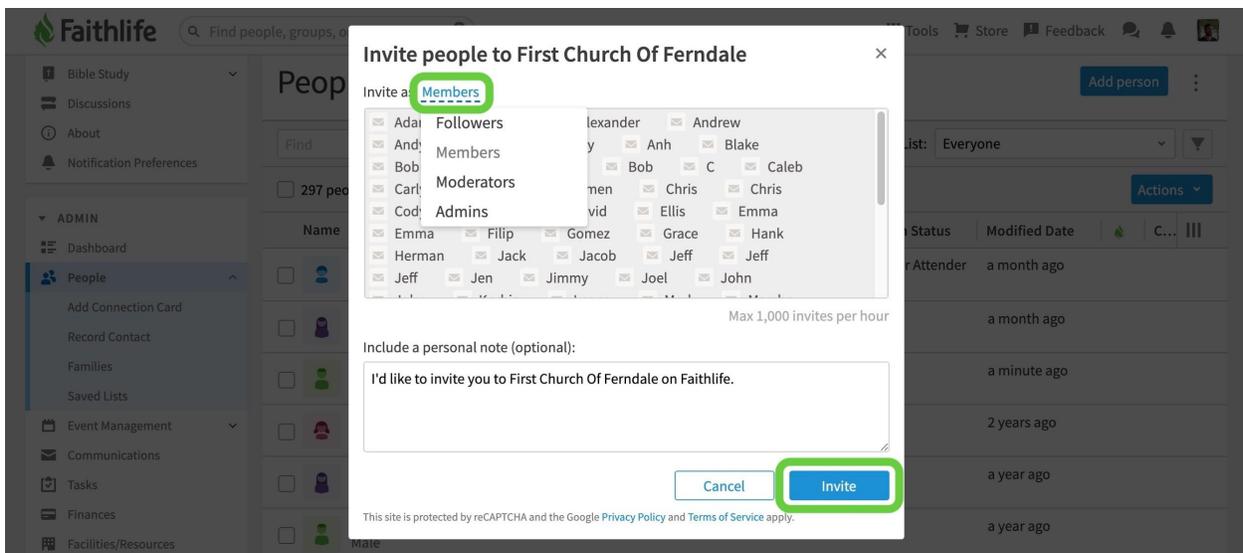
A notification confirms invites have been sent to everyone in your people records with an email address who is not a member of your group.

View or Withdraw Pending Invitations

To view individual pending invitations to your group, select any Person Record and view the **Group Status** dropdown. If necessary, you can withdraw an invitation from this dropdown as well.
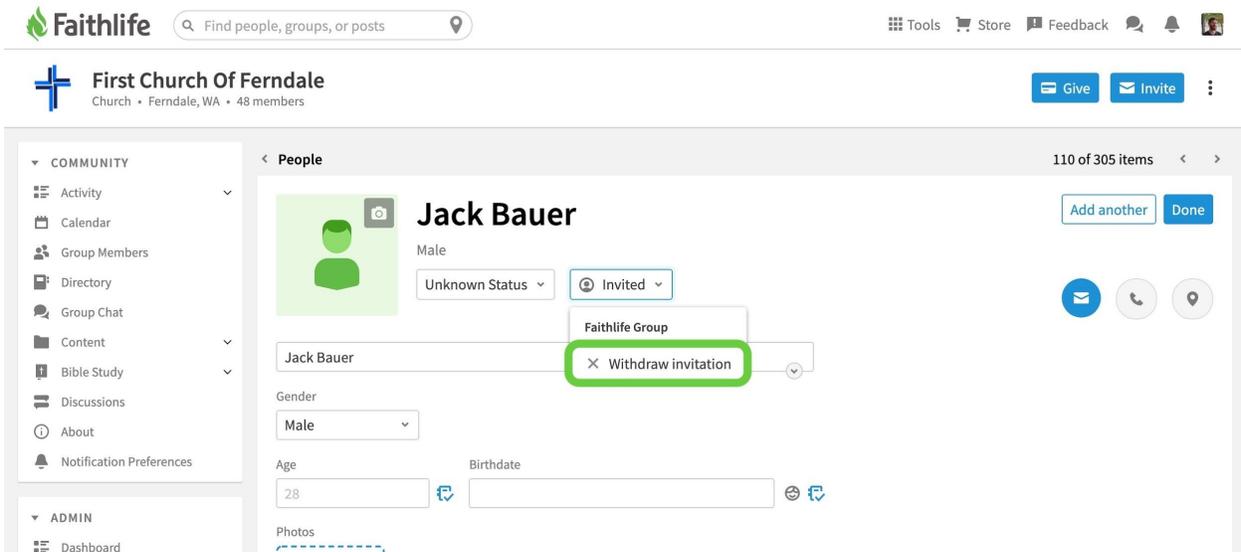
To view *all* pending invites, click **Group Members** in the **Community** panel and select **Pending invites** on the right. You can withdraw any pending invite(s) by checking any row(s) and clicking the **Withdraw** button above the table.
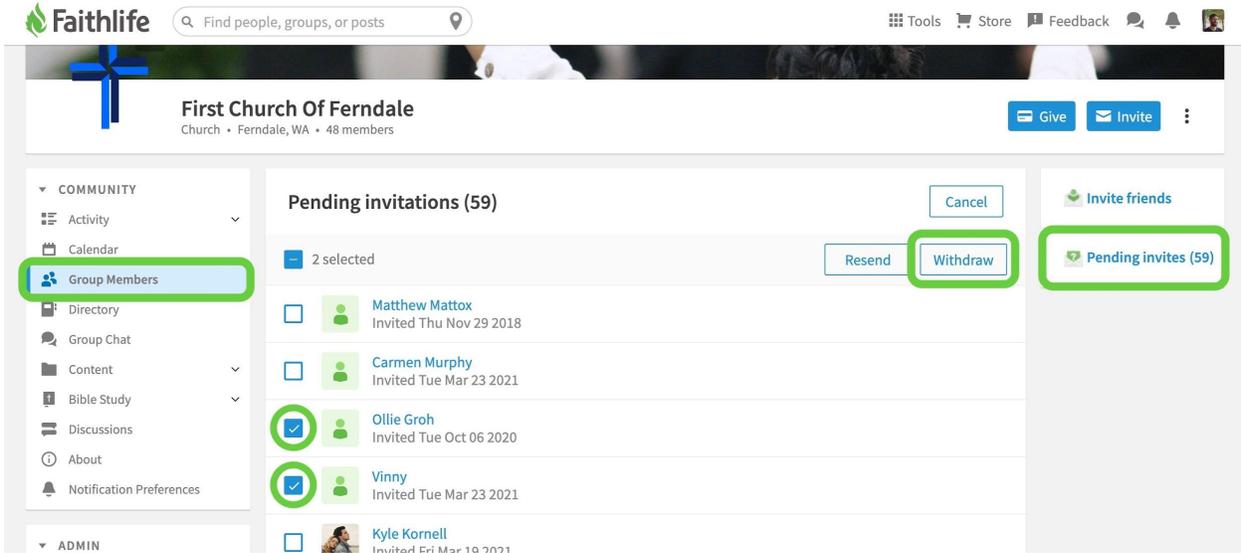
Foster Engagement

Building engagement with new tools and resources takes intention on your part—and time. Here are some approaches that we've seen other churches use to successfully onboard their staff, volunteers, and congregation to the tools and resources included in Faithlife Equip:

Engage Leaders and Early Adopters

- Take time in your staff meeting to get everyone connected with your church group at faithlife.com. Your congregation will do what is modeled for them, so make sure your leaders exemplify what you want your people to follow. Refresh the vision driving the addition of Faithlife Equip to your ministry tools. Follow up with your staff
- Identify church members who are enthusiastic about using technology in your church. We call these people "early adopters." Even though they may not have official leadership positions in your church, they can be positive voices and help create momentum by using Faithlife resources and sharing their enthusiasm. When you speak with them, communicate the vision driving your decision to select Faithlife Equip.
- Follow up with your staff and early adopters to address any challenges or concerns they may encounter as they get started with Faithlife.

Onboard Your Teams
- If you haven't already, create teams for any ministry area you want connected to your Faithlife church group. Consider adding teams for:
  - Children's Ministry
  - Youth Ministry
  - Women's/Men's Ministry
  - Facilities
- Encourage team leaders to begin using Equip features and posting to your group page and/or their own team/group.
- Host one or more training sessions for your teams.

Build Anticipation
- Add Faithlife/church group info to your digital signage.
- Send an email to your congregation and post to your website and social media outlets letting your followers know about an exciting announcement about new tools and resources for your church coming this weekend.
- Host a training session for your volunteers assisting with signups.
- Print postcards or bulletin inserts with instructions on how people can create their profiles, set up recurring giving, and join small groups/ministry groups.

Get the Word Out
- Plan a rollout Sunday when you will announce Faithlife to your congregants.
- Show the "Never Miss a Beat" promo video (or make one of your own) and make a verbal announcement about signing up on the church's group page. Include a bulletin announcement and promo cards on each seat.
- Let people know that this is the best way to stay connected with the church activities and be informed about what is going on in the life of your church.
- Send invites to create a profile on your church group. Maximize the impact of this invitation by timing it to arrive shortly after the end of your church service.
- Encourage people to download the Faithlife app and find your church group.

Follow Through

- Send out a newsletter this week and highlight your Equip resources and invite recipients to create an account. Include a link to the "Never Miss a Beat" video.
- Share a video from Faithlife TV to your church group page or start a new reading plan.
- Encourage your congregation to post on your church's group page. Promote engagement by posting questions people can respond to like: What is something God has done that you are grateful for? What verse has God used in your life this week? What needs are you aware of in our community?
- Make five or more additional verbal announcements encouraging your congregation to join your church group. Be creative and focus on the benefit to your congregation—getting access to content or a tool or feature that meets a felt need. Consider highlighting a book or video that aligns with something your church is talking about right now.
- Make information available about your church group and Faithlife resources at your Welcome Center or in any venue where you greet your guests. If you use first-time guest gifts, include a short note about how Faithlife helps them get connected and how to start using it.
- Incorporate into your membership process. Show your congregation how to create a profile as part of your new members class.

Conclusion

Congratulations! You've completed the key steps to get started with setting up your group with Faithlife Equip. We are excited to partner with you in helping your church grow spiritually, connect to each other, and steward the resources God has given you.

Need More Assistance?

Additional Resources

Find more training and documentation at support.faithlife.com

Sign up for webinars & live training at faithlife.com/church-tech-webinars

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Contact Us Anytime

We're open 365 days a year (including holidays).

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