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.





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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 <u>https://faithlife.com/store/surveys/trainingfeedback</u>.

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.

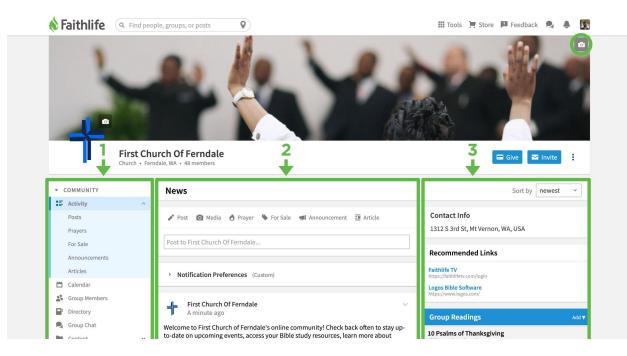
Find Your Church Group

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

ጰ Faithlife	Q Find people, groups, or posts	🏭 Tools 📜 Store 📕 Feedback 🔍 🌲
ł	First Church Of Ferndale Church • Ferndale, WA • 48 members	Give ≦ Invite :
- COMMUNITY	News	Sort by newest ·
Calendar	✓ ✓ Post i Media O Prayer Sor For Sale I Announcement I Article	Contact Info
Group Members	Post to First Church Of Ferndale	1312 S 3rd St, Mt Vernon, WA, USA Recommended Links
Group Chat	 Notification Preferences (Custom) 	Faithlife TV https://faithlifetv.com/login
Bible Study	First Church Of Ferndale	Logos Bible Software https://www.logos.com/
AboutNotification Prefer	14 minutes ago	Group Readings Add
▼ ADMIN	to-date on upcoming events, access your Bible study resources, learn more about opportunities to serve, share prayer requests or praise reports or to connect with your small groups.	10 Psalms of Thanksgiving

- **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).

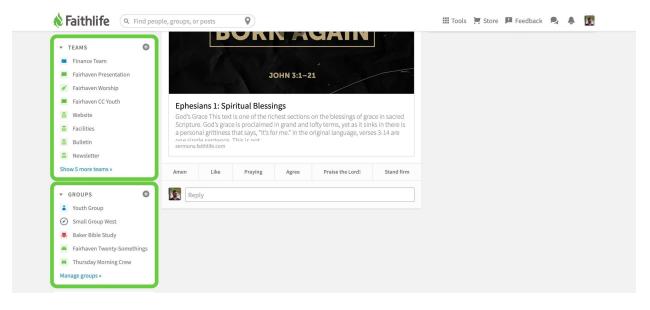
(i) About	First Church Of Ferndale	Add 🔻
Notification Preferences	Welcome to First Church of Ferndale's online community! Check back often to stay up-	
▼ ADMIN	to-date on upcoming events, access your Bible study resources, learn more about opportunities to serve, share prayer requests or praise reports or to connect with your small groups.	Connect
E Dashboard	Amen Like Praying Agree Praise the Lord! Stand firm Read 6 Days on Light	
🗳 People 🗸 🗸	100% complete +1 reader	Connect
📋 Event Management 🗸 🗸	Reply Reply	Connect
Communications	Read LEB in one year (2) 52% complete - 0 readers	
🗹 Tasks		Connect
Finances	Show more »	
Facilities/Resources	Snow more »	
I Forms		
🖬 Organizations		
Website		
🔲 Mobile App		
Reporting ~		
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.

- COMMUNITY	News	Sort by newest
Activity	^	
Posts	🖍 Post 🔯 Media 👌 Prayer 🔖 For Sale 🔳 Announcement 🧾 Article	Contact Info
Prayers		1312 S 3rd St, Mt Vernon, WA, USA
For Sale	Post to First Church Of Ferndale	
Announcements		Recommended Links
Articles	> Notification Preferences (Custom)	Faithlife TV https://faithlifetv.com/login
📛 Calendar		Logos Bible Software
Group Members	First Church Of Ferndale	https://www.logos.com/
Directory	First Church Of Ferndale 22 minutes ago	Group Readings
Sroup Chat	Welcome to First Church of Ferndale's online community! Check back often to stay up-	
Content	to-date on upcoming events, access your Bible study resources, learn more about opportunities to serve, share prayer requests or praise reports or to connect with your	10 Psalms of Thanksgiving 100% complete • 2 readers
Bible Study	 small groups. 	Conne
Discussions	Amen Like Praying Agree Praise the Lord! Stand firm	Read 6 Days on Light
(i) About	Amen Like Fraying Agree Fraise the Lord: Stand Infit	100% complete • 1 reader
Notification Preferences	Reply	Conne

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.

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- COMMUNITY		News						Sort by newest ~
Activity	^							
Posts		🎤 Post 🖸 M	edia 👌 Prayer 🎙	For Sale 🖪	Announcement 🔳	Article	Contact Info	
Prayers							1312 S 3rd St, Mt Vernon, WA	, USA
For Sale		Post to First Chu	Irch Of Ferndale					
Announcements							Prayers	
Articles							First Church of Ferndale 's Pr	rayers
Calendar		> Notification	Preferences (Cust	om)				Not now Connect
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Directory		32 minu	tes ago				10 Psalms of Thanksgiving	
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Content	~	opportunities to			ise reports or to con			Connect
Bible Study	~	small groups.					Read 6 Days on Light	
Discussions		Amen Li	ke Praying	Agree	Praise the Lord!	Stand firm	100% complete • 1 reader	
(i) About				3.00				Connect

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.

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✓ COMMUNITY ✓ CALINITY ✓ Calendar ✓ Calendar ✓ Calendar	*	Activity Feed Side	to appear in the group sidebar	
Group Chat		Widget list	Active	Live preview
Content	~	Group Readings	Contact Info Delete	Contact Info
Bible Study	~	Community Notes	Group Prayers Delete	1312 S 3rd St, Mt Vernon, WA, USA
Discussions		Contact Info	Group Readings Delete	
(i) About		Group Prayers	Recommended Links Delete	Prayers View: Today ♥ Add
Notification Preferences		Verse of the Day	URL https://faithlifety.com/login	First Church of Ferndale 's Prayers
- ADMIN		Audio Channel	Title Optional	Not now Connect
Dashboard		Recommended Links	URL https://www.logos.com/	Group Readings Add V
People	ž	RSS Feed	Title Optional Logos Bible Software	10 Psalms of Thanksgiving
Communications	*	Video Channel	Add another link	100% complete + 2 readers
🕄 Tasks			Verse of the Day Delete	Read 6 Days on Light
E Finances				100% complete + 1 reader

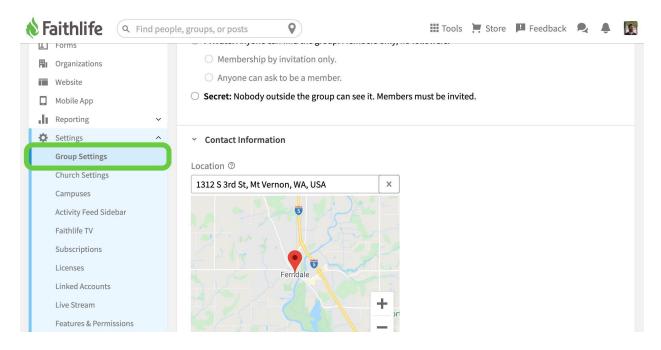
STEP 1

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.

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▼ COMMUNITY E Activity	~	Group Settings					
 Calendar Group Members Directory Group Chat 		Group Name ® First Church Of Ferndale					
Content Bible Study	~	Group URL ③ Faithlife.com/ ferndale					
About Notification Preferences		Group Type ③ Church					
▼ ADMIN II Dashboard Lashe	~	Group Nickname [®] First Church Of Ferndale Is this a temporary group? [®] NO					
Event ManagementCommunications	~						

- **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.

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Ŧ	ADMIN		Group Nickname @
13	Dashboard		First Church Of Ferndale
	People	~	Is this a temporary group? ⑦ ONO
	Event Management	~	
\sim	Communications		 Privacy and Safety
1	Tasks		 Privacy and Safety
	Finances		Privacy Level
H	Facilities/Resources		Public: Anyone can find and follow the group.
I	Forms		O Private: Anyone can find the group. Members only, no followers.
B	Organizations		O Membership by invitation only.
	Website		O Anyone can ask to be a member.
	Mobile App		○ Secret: Nobody outside the group can see it. Members must be invited.
d	Reporting	~	
4	Settings	^	 Contact Information
	Group Settings		
	Church Settings		
	Campuses		1312 S 3rd St, Mt Vernon, WA, USA ×

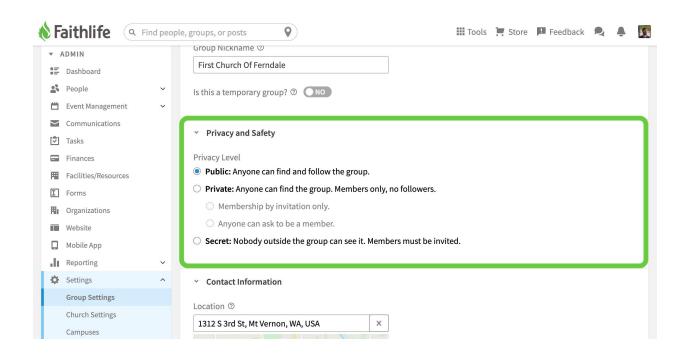
Privacy is set on a per-group basis. In other words, you can set your main church group to one setting and each subgroup to a different setting. Privacy settings stay with the individual group and are controlled on two levels:

- **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

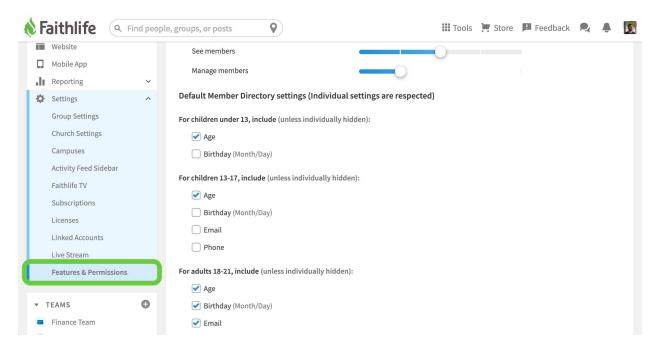
- People can find your group on faithlife.com.
- No one can join or follow your group without your permission. You can set whether or not people can request to join your group (select one of the sub-options to set your preference).
- If any content privacy level is set to **Public**, that content will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

K Faithlife (Find people	e, groups, or posts	Tools	📜 Store 📕 Feedback	< 🔍 🌲 🌆
First Church Of Fe			Give	Invite
▼ COMMUNITY III Activity ~	Features and Permissions			
Calendar Calendar Group Members Directory	Activity News feed of posted activity in the group Who can Admins	Mods Members Foll	llowers Public	
 Group Chat Content 	Read the activity feed Reply to activity feed posts			
Bible Study Discussions About	Post to the activity feed Manage posts in the group	0		
Notification Preferences	Edit group information Calendar Shared schedule of recurring and one-time events			YES
 ► ADMIN ■ Dashboard 	Cuchersite to outernal colondar			

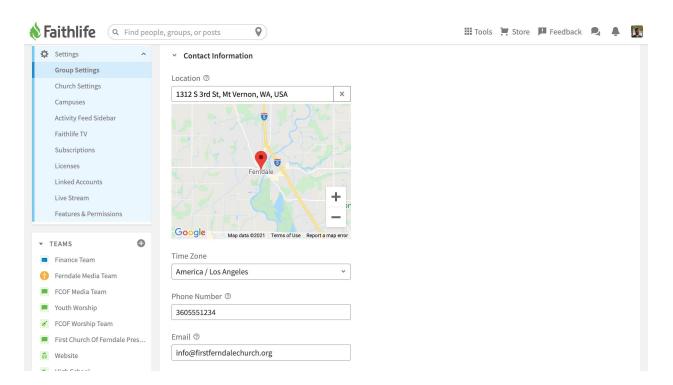
- Admins: complete control over all group settings and actions
- Mods: maintain and manage the group
- Members: regular members of the group
- **Followers:** those with a Faithlife account who can read group posts for *followers* or *public* without becoming members
- **Public:** anyone online with a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

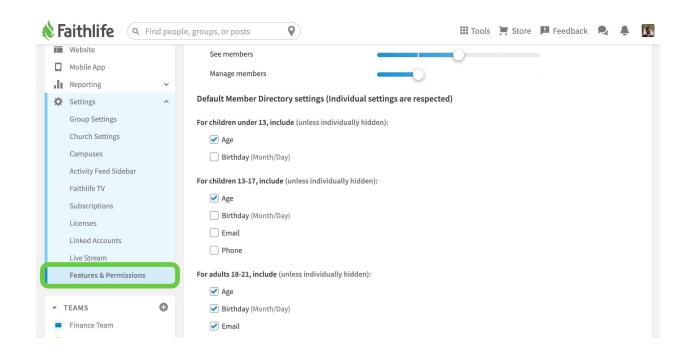
Change how your group appears to others in the about section.

& Faithlife (Find people	e, groups, or posts	Tools	L Store	Feedback	R	
About Faithlife Contact Privacy Terms of Service Developers	 About Tagline ③ Equipping our Community to Grow in the Light of the Bible! 					
Help	Description © Normal + B I U != := % Enter your content here					

- **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.

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1 1 1 1	Bible Study Discussions About Notification Preferences	~	Post to the activity feed Manage posts in the group Edit group information		0			
	ADMIN Dashboard People Event Management	~	Calendar Shared schedule of recurring and one- Subscribe to external calendar Who can	time events Admins Mods	Members Followers Public		YES	
	Communications Tasks Finances	Ŷ	View the calendar Create events	0-				
	Finances Facilities/Resources Forms Organizations		Member Directory People who are connected to Who can Invite new members	o the group Admins Mods	Members Followers Public			
=	Website		See members		ŏ			

STEP 2

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.

🗞 Faithlife 🔍 🔍	nd people, groups, or posts	III Tools	📜 Store	Feedback	R	Ŷ	0
 Mobile App Reporting Settings TEAMS Proclaim Presentation Team Faithlife Giving Finance Team Youth Ministry Manage teams > 	Continue reading						
 ▼ GROUPS ▲ Discipleship 101 Manage groups > About Faithlife Contact 	•						

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.

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Notification Preference				
Notification Preference	.es	Q		All Ministry Types 🗸 🗸
▼ ADMIN				Add
E Dashboard				
People	~	Name	Туре \downarrow	Description
📋 Event Management	~	Fine Arts	Youth Ministry	Fine Arts Festival is a discipleship tool of AG Youth Ministries
Communications		High School	Youth Ministry	Ministry to lead, train, disciple, and serve high school students.
🔽 Tasks		Junior High	Youth Ministry	Ministry to lead, train, disciple, and serve junior high school
Finances			Marchine Marchanese	Ministry and anote directed a read source and directly and
Facilities/Resources		Middle School	Youth Ministry	Ministry to lead, train, disciple, and serve middle school stud
I Forms		Teen Bible Quiz	Youth Ministry	Bible Quiz is a discipleship ministry geared for teens in sixth $\ensuremath{t}\xspace\ldots$
B Organizations		Youth Ministry (1 exists)	Youth Ministry	Ministry to lead, train, disciple, and serve junior high and hig
Website		□ YWAM	Youth Ministry	A global movement dedicated to serving Jesus throughout t
Mobile App		Volunteering	Volunteering	Ministry team for volunteer recruitment. training. and recog

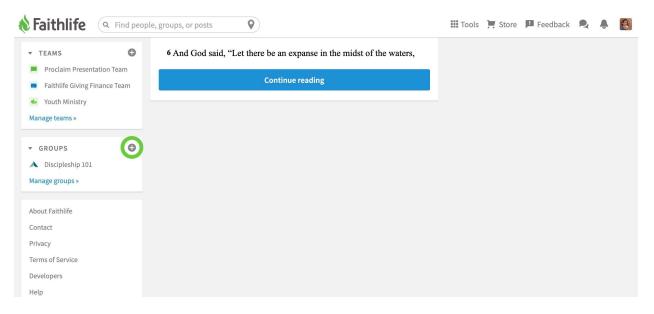
Any groups you've created are displayed at the top of the screen.

COMMUNITY	Teams		
Activity	^ Teans		
Posts	Search team membersQ		Actions 🗸
Prayers			1
For Sale	Name	Role Email	Date Joined
Announcements	Proclaim Presentation Team		
Articles	Presentation Team • 1 member •	• Closed	Add members
Calendar			
Group Members	Faithlife Giving Finance Team Finance Team • 1 member • Secr	ret	Add members
Directory			
Group Chat	Youth Ministry		[
Content	Vouth Ministry • 1 member • Sect	ret	Add members
Bible Study	×		
Discussions			

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**.

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		Church	General	Small Group	Worship Team	Leadership Group	Committee					
		Author	Band	Bible Reading	Book Reading	Class	Club					

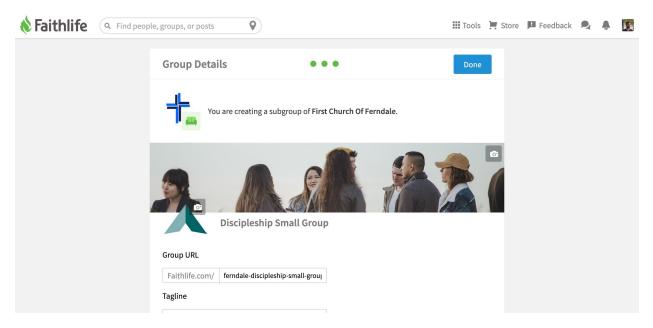
4. Add basic information for your subgroup.

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		Discipleship Small Grou	ıp							
		Group Location								
		Address or Room 102	2 etc.							
		Privacy Level								
		Secret		v						
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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.

My Faithlife	My Faithlife	Sor	t by relevance 👻
Calendar Giving	🎤 Post 🧿 Media 👌 Prayer 🔖 For Sale 🖪 Announcement 🧾 Article		
Community Notes	Post to My Faithlife	Get to know yo community (and	
Tasks Messages		Complete your	profile »
GROUPS			60%
Church Documents Library Faithlife Stock Media			
		Today's Readings Add a new reading	Ad I plan above

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.

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1.00	COMMUNITY		ews							Sort by n	ewest	*
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	Articles	>	Notification Pref	ferences (Balanced)				Prayers			View: Toda	ay ▼ Add
	Calendar Group Members							First Chu	ch of Fern	dale 's Prayers Not no	w Co	onnect

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).

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🛗 Calendar					First Church o	of Ferndale 's Prayers		
😤 Group Memb							Connect	

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.

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🔓 Group Member	s							Not now	Conn	iect

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**.

🚯 Faithlife	Q Find people, group	os, or posts	0			## 1	ools 📜 Sto	re 📕 Feedback	R	۹ (ę.
				1							
		Invite pe	ople to First Chu	urch Of Fern	dale	×					
-		Invite as: Mer	mbers			Add contacts					
		🔤 kyle.kor	mell@gmail.com ×			×					
Ţ	First Church Of Church • Ferndale, WA • 4	Include a per	sonal note (optional):		Max 1,000	invites per hou		🖨 Give		:	
COMMUNITY	Ne	group will g	vite you to First Church C ive you access to our onl rces, and more!					Sort by n	ewest	•	
Posts Prayers	1	+ Invite to add	ditional groups		Canad	Invite					
For Sale Announceme		This site is protect	ted by reCAPTCHA and the Googl		Cancel	/.		/ernon, WA, USA			
Articles	, 	Notification Pr	references (Balanced)			Pra First		ndale 's Prayers			
💦 Group Memb									v Cor	nect	

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.

Group Members		Directory		View as Admin Member
Directory		Directory		
Group Chat		Find	Show:	Members & Regulars 👻 🛛 By name 👻
Content	~			
Bible Study	~	15/292 people		Actions 👻
Discussions		Name \downarrow	Group Status	Modified Date
About				
Notification Preferences		Ollie Groh 💯 Male, 4		4 months ago
ADMIN		Jonathan (Faithlife) Male	Admin	20 days ago 🗸
Dashboard		John Doe		a year ago
People	~	Male, 30	Nvite	, ,
Event Management	~	Jett Jaxon	Admin	a day ago 🗸 🗸
Communications		□ Male, 31		
Tasks		Jekel Hide Male		7 months ago
Finances		Jeff Example		2 months ago
Facilities/Resources		Male		2 months ago

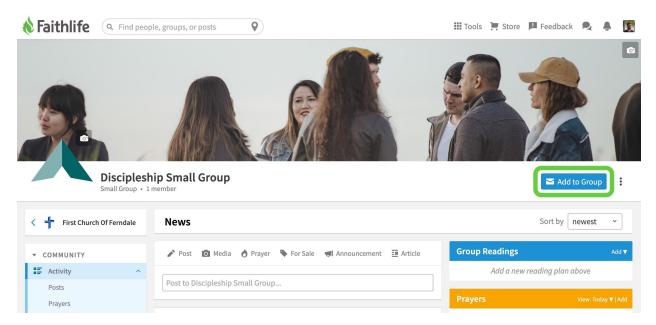
Note: To withdraw an invitation or change an existing person's status, select the person's row in your Directory, expand the **blue Actions button**, and choose **Withdraw Invitation** or **Change to ... [Follower, Member, Moderator, or Admin]** respectively.

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).

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	Assign new members to Discipleship Sn		
Discipleship Sr		Add contacts	Add to Group
Small Group • 1 member	Admins 0 New team members This site is protected by reCAPTCHA and the Google Privacy F	Cancel Assign Policy and Terms of Service apply.	Sort by newest *
E Activity	🕈 Post 💿 Media 👌 Prayer 💊 For Sale 🤜 ost to Discipleship Small Group	Announcement I Article Group R	Add a new reading plan above

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

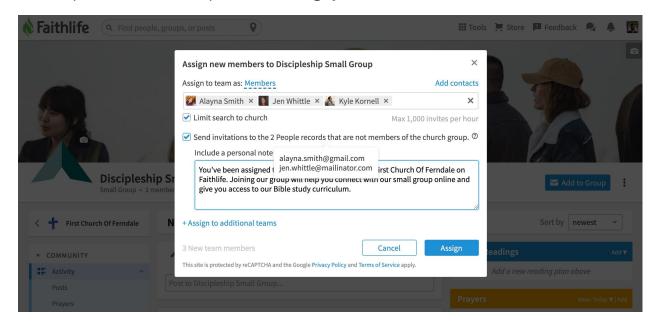
3. Add invitees.

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.

Faithlife (Find people, gro	ups, or posts	🗰 Tools 📜 Store	🏴 Feedback 🔍 🌲 🚺
	Assign new members to Discipleship Small Group	×	
	Assign to team as: Members	Add contacts	
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	Kyle Kornell		
Discipleship S Small Group • 1 membe	+ Assign to additional teams		Add to Group
< 🕂 First Church Of Ferndale	2 New team members Cancel This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.	Assign	Sort by newest >
- COMMUNITY	🎽 Post 🔟 Media 👌 Prayer 💊 For Sale 🖪 Announcement 🧮 Article		
🗄 Activity 🗠			
Posts			
Prayers		Prayers	Vîew: Today 🛡 Add

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.

C a faithlife.com/pc-ok-discipleship-101/directory					¢ • •	Guest		
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苗 Calendar			//	Bellingh	am Agate Bay	STATE.	1.115	P)
Aembers			Lummi Island		Sudden Valley	() Acme		
Roup Chat		Google Eastsound		Bellin	TT A		ogle Terms of Use Report a	map erro
Content	~							
Bible Study	~	Team Mem	bers				Assign to group	•
Discussions								
i About		Find	۹		List: C	Custom Filter	~	Y
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		Name	Family	Phone	Email	Group Status	Modifi 4	
- ADMIN								
ADMIN		Visitor (alay	/na.o.smith		alayna.o.s	Pending	a few seconds	
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Dashboard	*	Visitor (alay			alayna.o.s	Pending Member	a few seconds : an hour ago	

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.

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	Jan 2021 Feb	2021 Mar Apr May Jun	Jul Aug Sep Oct N	lov Dec ≻		View today 🔅 🌔	Export New event g Day Week Month
First Church Of Ferndale	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
March 2021	 21 10a 1st Worship Service 11:30a 3rd Church Service 12p 2nd Worship Service 	22 6:30a Kids Place Daycare 7a Woman's Prayer Meetin 11a Pastor Mason's Meetin	23 Contraction Con	24 G:30a Kids Place Daycare 6p Wednesday Night Bible	25 💮 6:30a Kids Place Daycare 7p Zoom Service	26 G:30a Kids Place Daycare	27 🔗
1 2 3 4 5 6 7 8 9 10 11 12 13	28 G 10a 1st Worship Service 11:30a 3rd Church Service 12p 2nd Worship Service	29 6:30a Kids Place Daycare 7a Woman's Prayer Meetin 11a Pastor Mason's Meetin	30 Signal and Signal a	31 G:30a Kids Place Daycare 6p Wednesday Night Bible	Apr 1 3 6:30a Kids Place Daycare 7p Zoom Service	2 6:30a Kids Place Daycare 11a Bible Study	3 🖓
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 First Church Of Ferndale Church Management T 	11 10a 1st Worship Service 11:30a 3rd Church Service 12p 2nd Worship Service	12 6:30a Kids Place Daycare 7a Woman's Prayer Meetin 11a Pastor Mason's Meetin	13 6:30a Kids Place Daycare	14 6:30a Kids Place Daycare 6p Wednesday Night Bible	15 6:30a Kids Place Daycare 7p Zoom Service	16 6:30a Kids Place Daycare 11a Bible Study	17
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3. Add the event **as yourself** or **as group** to indicate who created the event

ጰ Faithlife 🔍 🗉	nd peop	e, groups, or posts		🏭 Tools 🃜 Store 🏴 Feedback 🍳 🌲 🎼	
▼ COMMUNITY II Activity	~	New Event		Cancel Create	
Calendar		To: First Church Of Ferndale	For: Public -	Image: Second	
 Directory Group Chat 		Title	Who should see this?	Event Image	
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Bible StudyDiscussions	~	Date and Time	Followers and Members, Moderators & Admins	Addeventimage	
AboutNotification Preferences		Tue, Mar 23	O Members	Details Type	
- ADMIN		Time Zone (America / Los Ar	and Moderators & Admins	🖬 General 🗸	
 Dashboard People 	v	 Needs setup / tear down 	- codd daelae	Resources Select *	
Event Management Communications	~	Location		Description	
Communications		Name			

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.

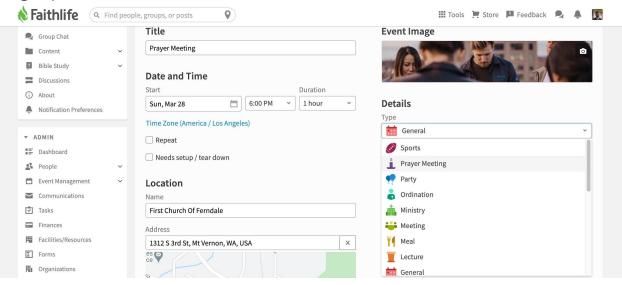
- To: **Public** via Your Group—anyone with a faithlife.com account can see your events if they view the group's calendar.
- To: **Followers** of Your Group—anyone who follows your group can see your events if they view the group's calendar.
- To: **Members** of Your Group—anyone who is a member of your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

Eaithlife C Find peop	ole, groups, or posts	🏭 Tools 🃜 Store 📁 Feedback 🔍 🌲 🌆
 COMMUNITY III Activity ✓ 	New Event	Cancel Create
Calendar	To: First Church Of Ferndale For: Public +	○ 🛐 as yourself 💿 🕇 as group
DirectoryGroup Chat	Title	Event Image
Content ~	Prayer Meeting, Sunday 6pm Prayer Meeting Sunday, March 28th, 6 pm	C Add event image
DiscussionsAbout	Start Duration Sun, Mar 28	Details
Notification Preferences	Time Zone (America / Los Angeles)	Type General *
▼ ADMIN	Repeat Needs setup / tear down	Resources Select
People ~ Event Management ~	Location	Description
Communications	Name	

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.

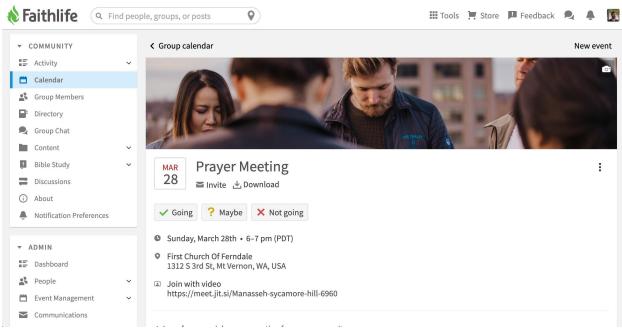


Example: If you need to add an event that only applies to your small group, navigate to the subgroup and add the event to the subgroup's calendar. When members of your

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.

ind peopl	le, groups, or posts	🎬 Tools 📜 Store 🔎 Feedback 🔍 🌲 厦
 Bible Study ~ Discussions 	Date and Time	
About Notification Preferences	Sun, Mar 28 🛗 6:00 PM 🔹 1 hour 🔹	Details Type
▼ ADMIN	Repeat	Prayer Meeting Resources
People ~ Event Management ~	Every Sunday ~ To	Select ~
Communications	Until He returns	Description Normal ≎ B I U ⊟ ⊟ ⊟ %
 Finances Facilities/Resources Forms 	Sunday, April 4, 2021	Join us for a special prayer meeting for our community.
Organizations Website	Sunday, April 11, 2021 Sunday, April 18, 2021	
Mobile App Reporting	Sunday, April 25, 2021	
Settings ~	Needs setup / tear down	

- 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.

Finances		Sunday, March 28, 2021	: 0	
Facilities/Resources		Sunday, March 28, 2021		Join us for a special prayer meeting for our community.
		Sunday, April 4, 2021	0 0	
I Forms		Sunday, April 11, 2021	:	
R Organizations		Sunday, ipin 11, 2021	•	
Website		Sunday, April 18, 2021	*	
Mobile App		Sunday, April 25, 2021		
Reporting	~	Current March 2003		
Settings	~	✓ Needs setup / tear down		
		Set up Tear down		
▼ TEAMS	0	30 min ~ 15 min	~	
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🔒 Ferndale Media Team		Location		
FCOF Media Team		Name		
Youth Worship				

Marking a setup/teardown time will ensure any resources you select for the event will be available during setup and tear down.

Reserve Resources

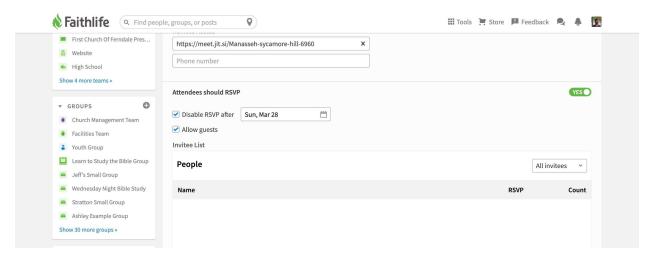
You can reserve resources from the dropdown menu. If you need a resource that is not yet in your system, click **+ Add another resource**. You can manage all your resources by clicking **Facilities/Resources** in the left-hand **Admin** navigation panel.

Discussions	Date and Time	
About	Start Duration	
Notification Preferences	Sun, Mar 28 🛗 6:00 PM 👻 1 hour 👻	Details
- Notification Preferences	Time Zone (America / Los Angeles)	Туре
▼ ADMIN		Prayer Meeting v
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	Needs setup / tear down	Select Y
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Website	St Chihuahua Mexican 🗊	Normal + B I U I = = %
Mobile App	12 × 10	

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.

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FCOF Media Team	Name	All invitees RSVP	
Youth Worship		Going	
FCOF Worship Team	Brett Scott	✓ Goir Maybe	
First Church Of Ferndale Pres		No response	
👸 Website	Alex Moffitt	Goir Not going	
🔹 High School			
Show 4 more teams »			
• GROUPS			

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.

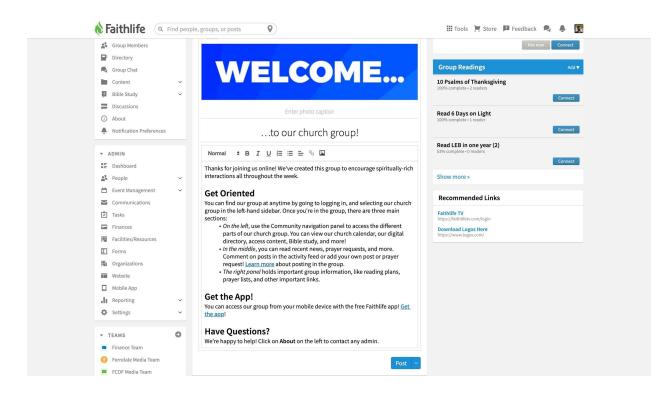
Pin a Welcome Post

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.

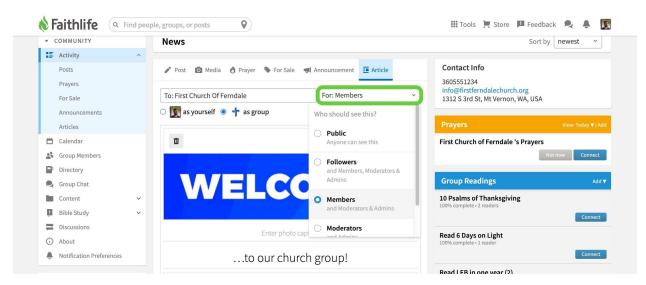
Note: If you are an Admin in your group *and* you have a Faithlife site, posting an article will simultaneously publish a blog article on your blog widgets unless you configure the widget to only show content from certain accounts.

Here's an example using the Article post type.



2. Set your post visibility.

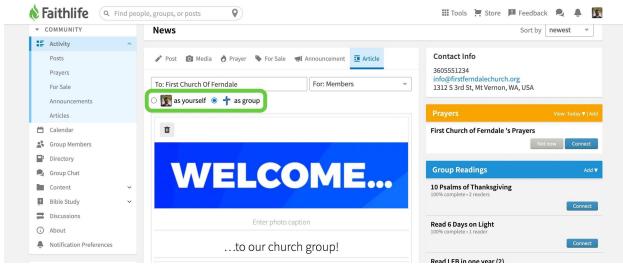
Your post will use your group's default **Read the activity feed** privacy permission. Many church groups set this level to "Public" so people visiting the group online can get a sense of your online community without needing to join. You can always set visibility for your specific post via the dropdown.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



Note: Group Admins can change the default activity feed permissions from the **Group Settings**.

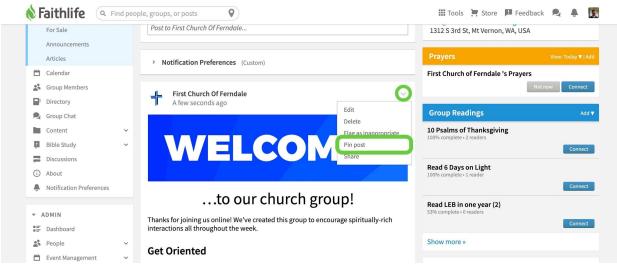
3. Choose the posting account.

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** \checkmark 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

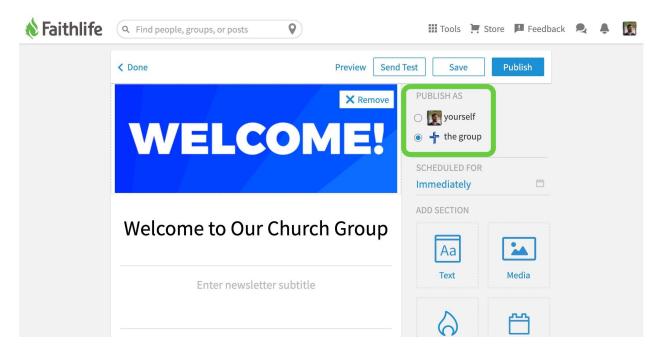
Your church group includes a drag-and-drop email newsletter. Expand **Content** in the left-hand panel and choose **Newsletters**. Click **Create Newsletter**.

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.

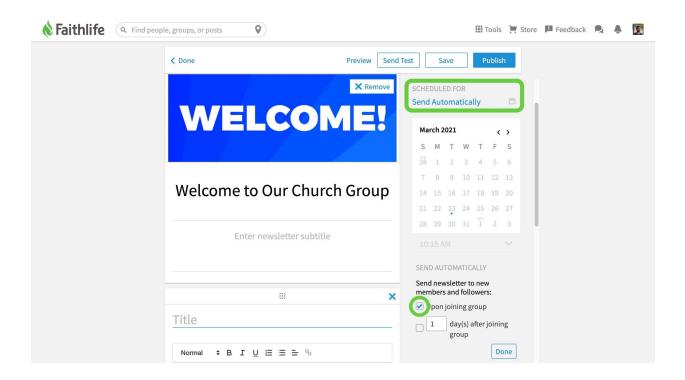
2. Choose the publish account.

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.

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.

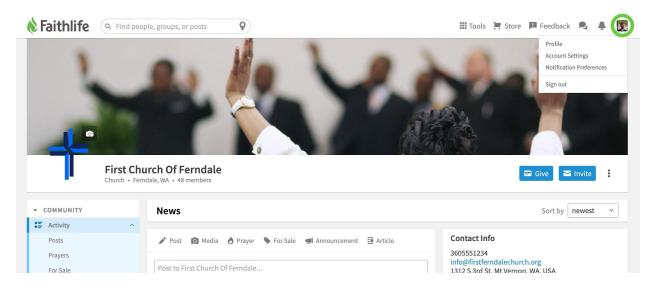
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Person Record or Faithlife Profile—What's the Difference?

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).
- 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.**

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- 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.

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- 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</u> <u>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.

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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**.

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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.

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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.

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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.

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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.

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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

Contact Us Anytime

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

support@faithlife.com | 888-634-2038 (US/Canada, toll-free) | +1 360-603-5576 (International)

