

# Quick Start Guide For People Management & Giving

Welcome to Aplos! Below is a list of recommended steps to help you set up your people and giving. If you need to set up accounting and donor management, this article can help:  
<https://www.aplos.com/support/articles/getting-started-checklist/>.

Each step will provide a link to a resource that covers the process in more detail. If you have any questions, contact our award-winning Support Team at (888) 274-1316 or [aplos.com/support](https://www.aplos.com/support).

## Import New Contacts

Choose File

No file chosen

Upload a file (.xlsx, .xls, .csv, or .txt")  
n.b. TXT must be tab separated

UPLOAD FILE

## Step 1: Add Your People

It's easy to import contacts in Aplos! If you have an Excel file of your donors and/or vendors, along with their contact information, our contact import tool can quickly bring those details into your account.

[www.aplos.com/support/articles/importing-contacts](https://www.aplos.com/support/articles/importing-contacts)

## Step 2: Create and Link Your Purposes

To track donations and prepare contribution statements in Aplos, you need to create purposes in the Donations section. You can then link those purposes to the related accounts in your accounting if you want your contribution deposits to also post in the bookkeeping.

[www.aplos.com/support/articles/purposes/](https://www.aplos.com/support/articles/purposes/)

## Step 3: Online Donation Form

Giving people a recurring donation option will help keep your donations more predictable. Once you create your Aplos online donation form, you can share it with your supporters or add it to your website so people can set up a weekly or monthly recurring gift to your organization.

[www.aplos.com/support/articles/online-donations](https://www.aplos.com/support/articles/online-donations)



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Purposes 

+ IMPORT

SHOW ACTIVE SHOW ALL

Displaying 1 to 2

Sequence	Name	Description	Partner	Linked to Accounting?
<div><div>Name:</div><div>Description:</div><div>Sequence: 1</div><div>Disabled: <input type="checkbox"/></div><div>Track this purpose in Accounting? <input checked="" type="checkbox"/></div><div><div>Income Account:</div><div>-- Select an account --</div><div>Fund:</div><div>-- Select a fund --</div></div><div>* Required</div><div>SAVE CANCEL</div></div>				

Your Template:  
Year End /  
<https://www.aplos.com/aww/give/DoingGoodStuff/yearend>

Colors

Logo & Main Image


Donor Information

Donation

Internet Address:  
<https://www.aplos.com/aww/give/DoingGoodStuff/yearend>

NEXT  
SAVE  
PUBLISH  
PREVIEW  
EXIT

Year End Campaign



Thanks to your generosity  
we have done so much  
Good Stuff this year!  
Help us do even more Good  
Stuff in the future!

Your Information

First Name\*

Last Name\*

First Name

Last Name

Email\*

Email

\*required field

# Quick Start Guide For People Management & Giving

< Events Details Tickets Payments Publish

Event Information

Event Name \*

Name

Description of Event

Description of Event (for internal purposes)

Users

ADD USER

Name	Email	AWS Status	AWS Roles
Daniel Van Gerpen (your user)	daniel@aplossoftware.com	enabled	Administrator: Full access to entire software.

Accountants

If you have an outside accountant or bookkeeper who reviews your books, you can add them to your organization by contacting [support@aplos.com](mailto:support@aplos.com) and we will be happy to assist you.  
You currently do not have any accountants associated with your organization.

Create Group

SAVE & ADD

SAVE & CLOSE

CANCEL

Group Name \*

Timezone

Pacific Time (US & Canada)

Group Admin Options

☒ Allow group admin to add existing contact as member

☒ Allow group admin to add new contact as member

Member Administration Options

☐ Allow non-administrators to send emails

☐ Allow administrators to edit their own profile

☒ Allow administrators to edit member profiles

☐ Member details viewable to non-administrators

## Step 4: Create an Event

Our Event Registration tool will allow you to easily create an online registration form for an upcoming event. Share your form so people can sign up and pay for their tickets in just a few simple steps. You can also pull a list of people who have signed up to manage your registrations.

[www.aplos.com/support/articles/events/](http://www.aplos.com/support/articles/events/)

## Step 5: Invite Other Users

You can share access with the rest of your team by adding them as users with role permissions in the Settings section. You can also create a Group or Team for your board or volunteers from any contact in your People section and invite them to a private group portal to schedule meetings, share documents, and sign up for volunteer opportunities.

[www.aplos.com/support/articles/settings-adding-managing-users/](http://www.aplos.com/support/articles/settings-adding-managing-users/)

[www.aplos.com/support/articles/groups-and-teams-getting-started/](http://www.aplos.com/support/articles/groups-and-teams-getting-started/)



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