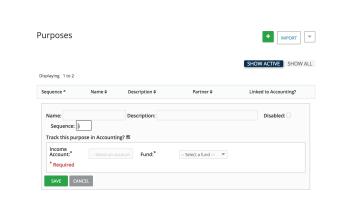
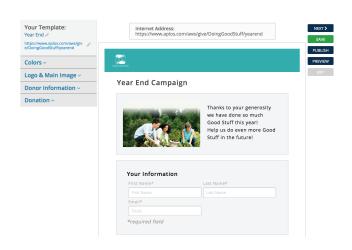
Quick Start Guide For People Management & Giving

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.

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/importingcontacts

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/

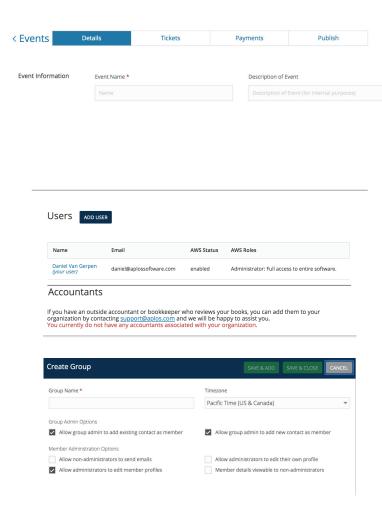
Step 3: Online Donation Form

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



Quick Start Guide For People Management & Giving



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/

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/settingsadding-managing-users/

www.aplos.com/support/articles/groupsand-teams-getting-started/

