Reference Guide

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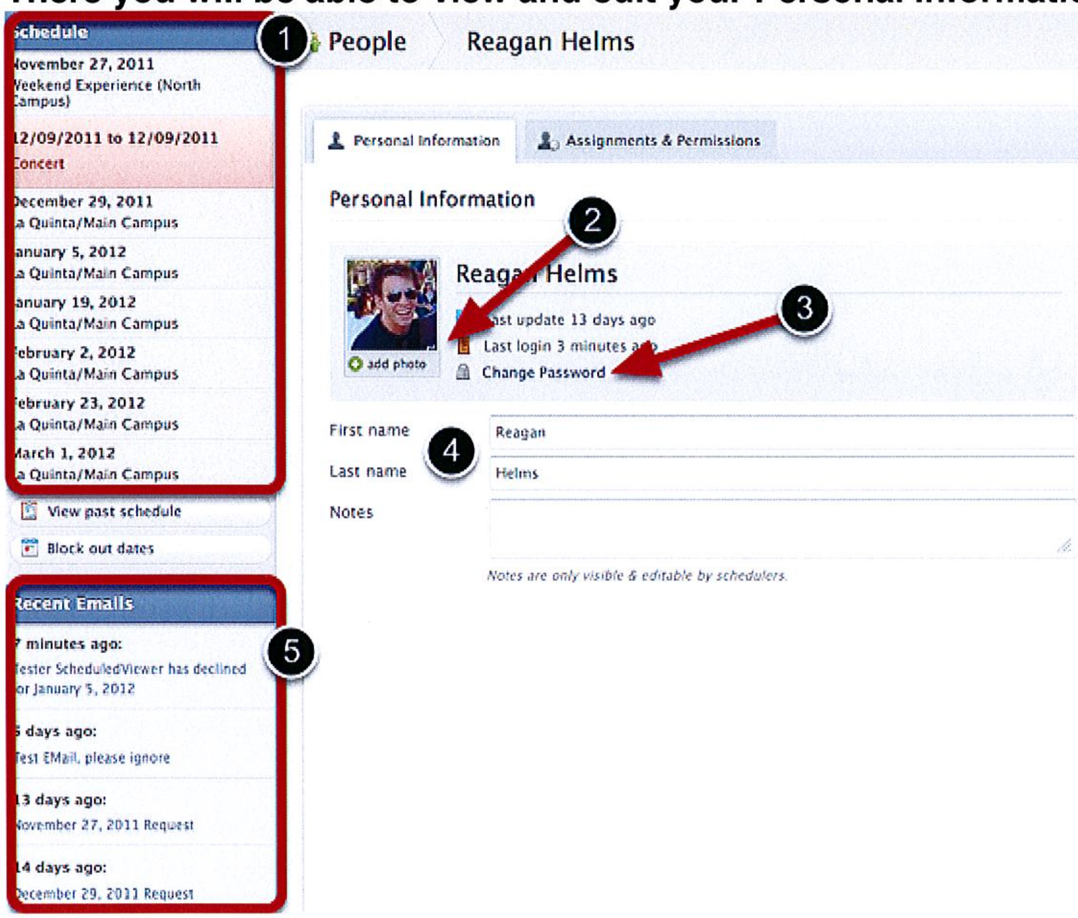
Login to Planning Center www.Planningcenteronline.com

How to set up your account:

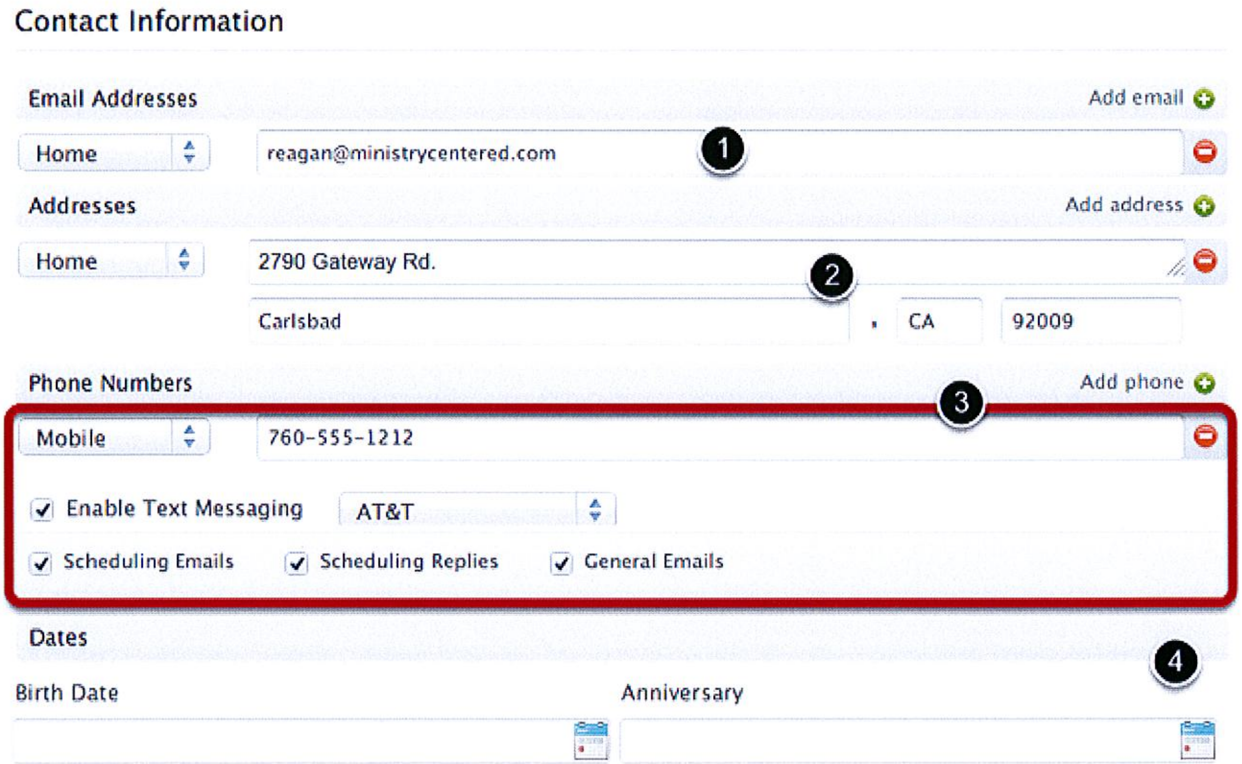
To access your Personal Account Information click on your name in the upper right corner.

There you will be able to view and edit your Personal Information.



1. Schedule - This shows you any dates that you are currently scheduled for. Click on the date of any plan listed here and it will take you directly to it. You can also view past schedule or block out dates from here.
2. Profile Picture - Upload or change your profile picture
3. Change Password - once you click 'Change Password', it will ask you to enter the new password and then confirm it. Make sure you click Save Person at the bottom when you're done.
4. Change First or Last name.
5. Recent Emails - from here you will be able to see any Planning Center emails that have come to you in the last three months.

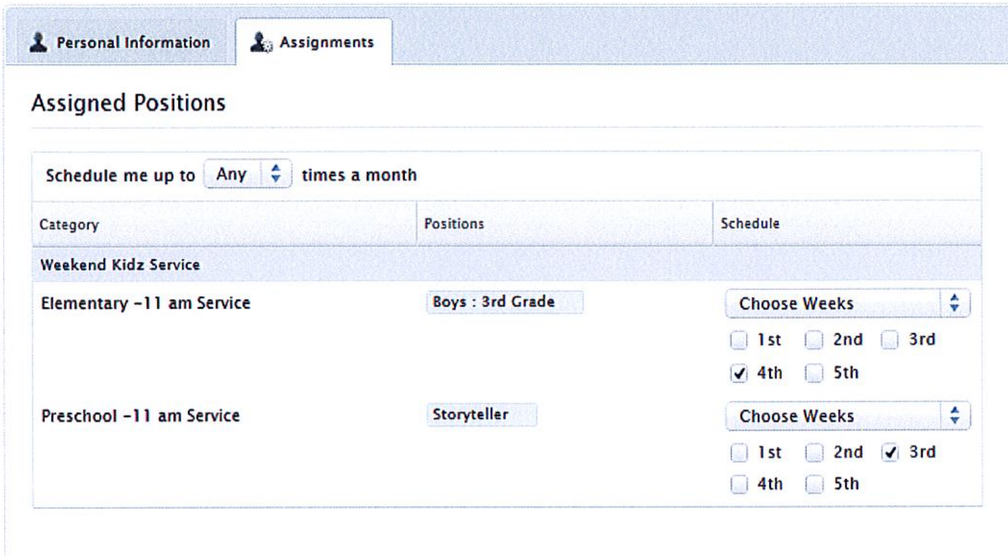
To the right of your profile you can enter in your contact information



1. Enter or edit email addresses. Click 'Add Another' to add more email addresses or click the red "-" to delete an email address. Any email address you add can be used as your login name. All messages sent from Planning Center will be delivered to all email addresses you add.
2. Enter any physical addresses you want your church to have
3. Enter phone numbers. If you enter a mobile number, as shown above, you can also opt to check the box to enable text messaging. This will allow you to receive text messages whenever you receive an email through PCO. The text will state that you have received an email and you will be able to accept or decline scheduling requests through text messaging.
4. Birthday or Anniversary dates.

Click Save Person at the lower right to save your changes

Click the Assignments and Permissions tab.

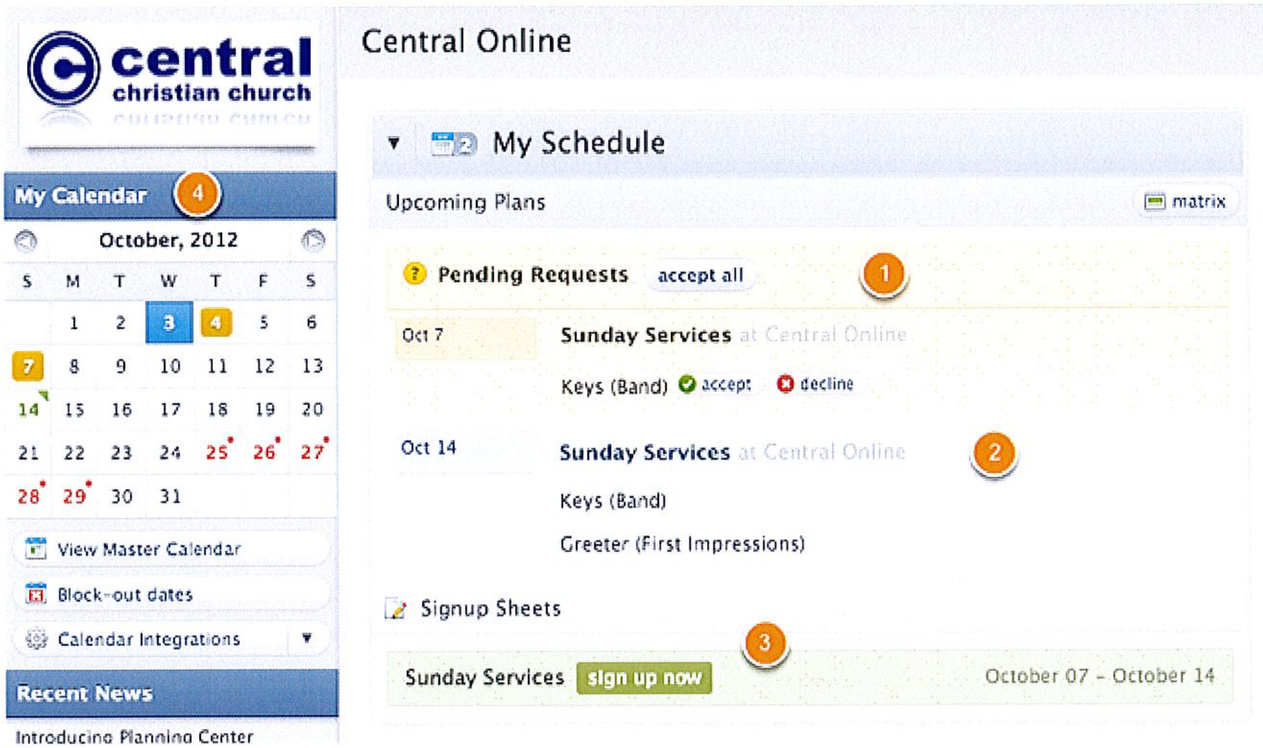


1. The first way to use preferences is an overall setting. This allows you to indicate how often you'd prefer to be scheduled over the course of a month.
2. The second way to use preferences is per service type and category. You can either set the amount of times in a month you'd like, the specific weeks of the month, or the frequency you'd like. When this is done, if your leader tries to schedule you more often than you've indicated you would prefer, they will receive a warning.

Click Save Person at the lower right to save your changes

Managing your schedule & calendar:

The My Schedule Page



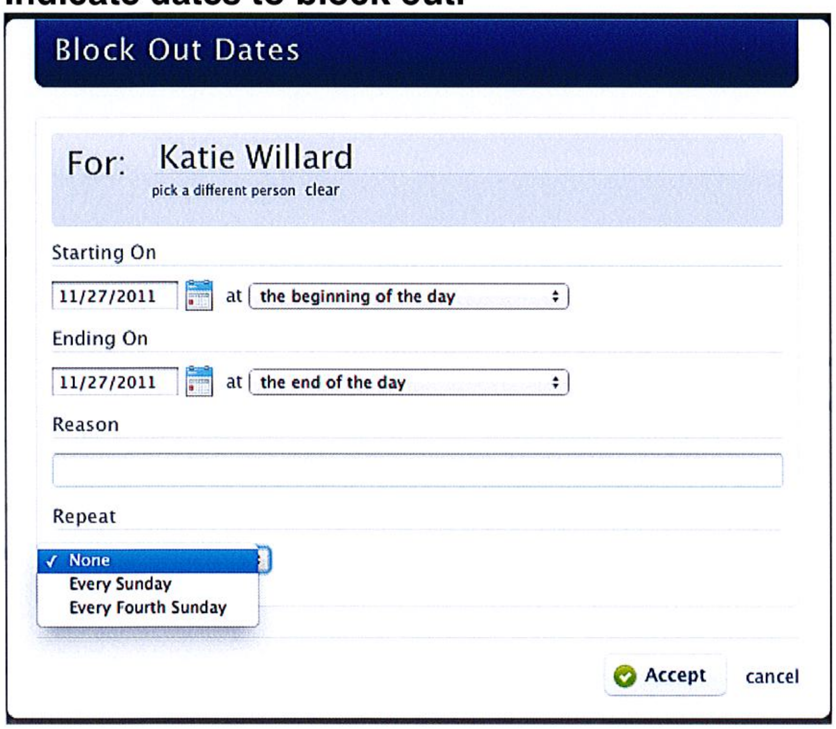
Zoom

1. **Pending Requests**- You will see a list of the requests that have been sent to you but you have not responded to yet. If someone has added you to their schedule but hasn't sent you an email yet, it will not show up in the Pending Requests area. Respond by clicking 'accept' or 'decline'.
2. **Upcoming Dates**- This section shows you any plans you have confirmed. Click decline if you are no longer available. Once you have declined, the only way to accept is to manually email your leader and ask them to reschedule you.
3. **Signup Sheets -** Some churches allow their users to schedule themselves. If you see a Signup Sheet, you can click the 'sign up now' button to schedule yourself for any dates that are created.
4. **My Calendar** displays a calendar with color-coded symbols over dates. A green triangle is for any dates you've confirmed, a yellow square is for any dates you've been notified of but haven't yet responded to, and a red dot is for dates you've either declined or blocked out, and grey is for a date that you are not scheduled for. The blue square is the current date.

How to block out dates:

Block Out Dates- Click there to input any block out dates you may have.

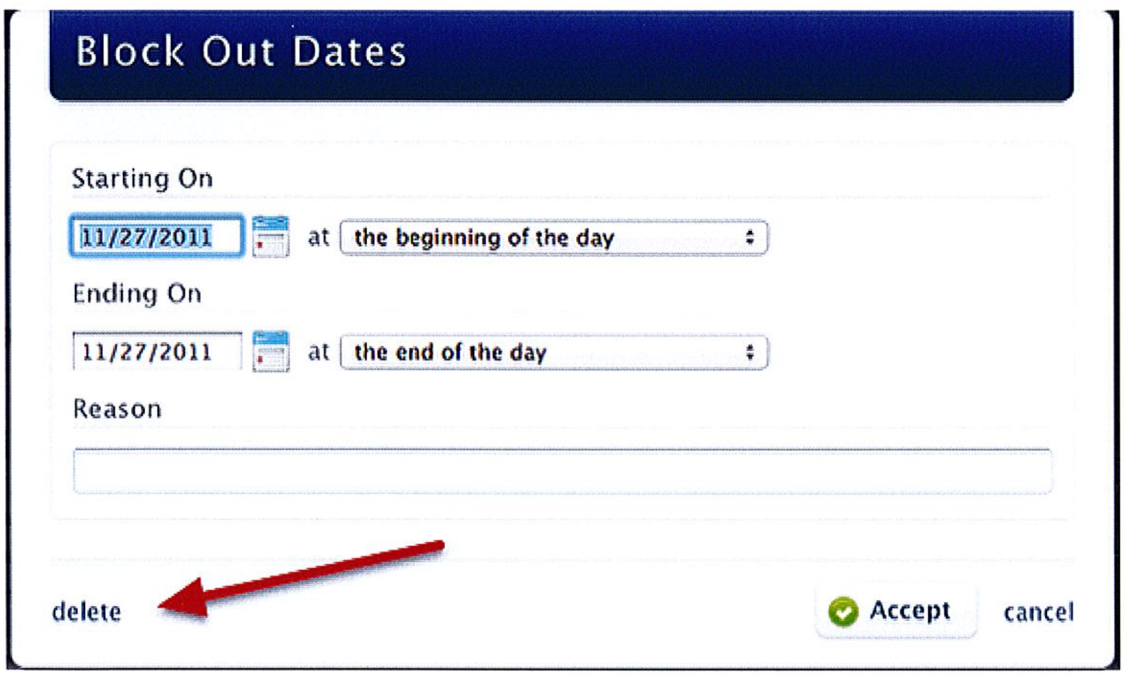
Indicate dates to block out.



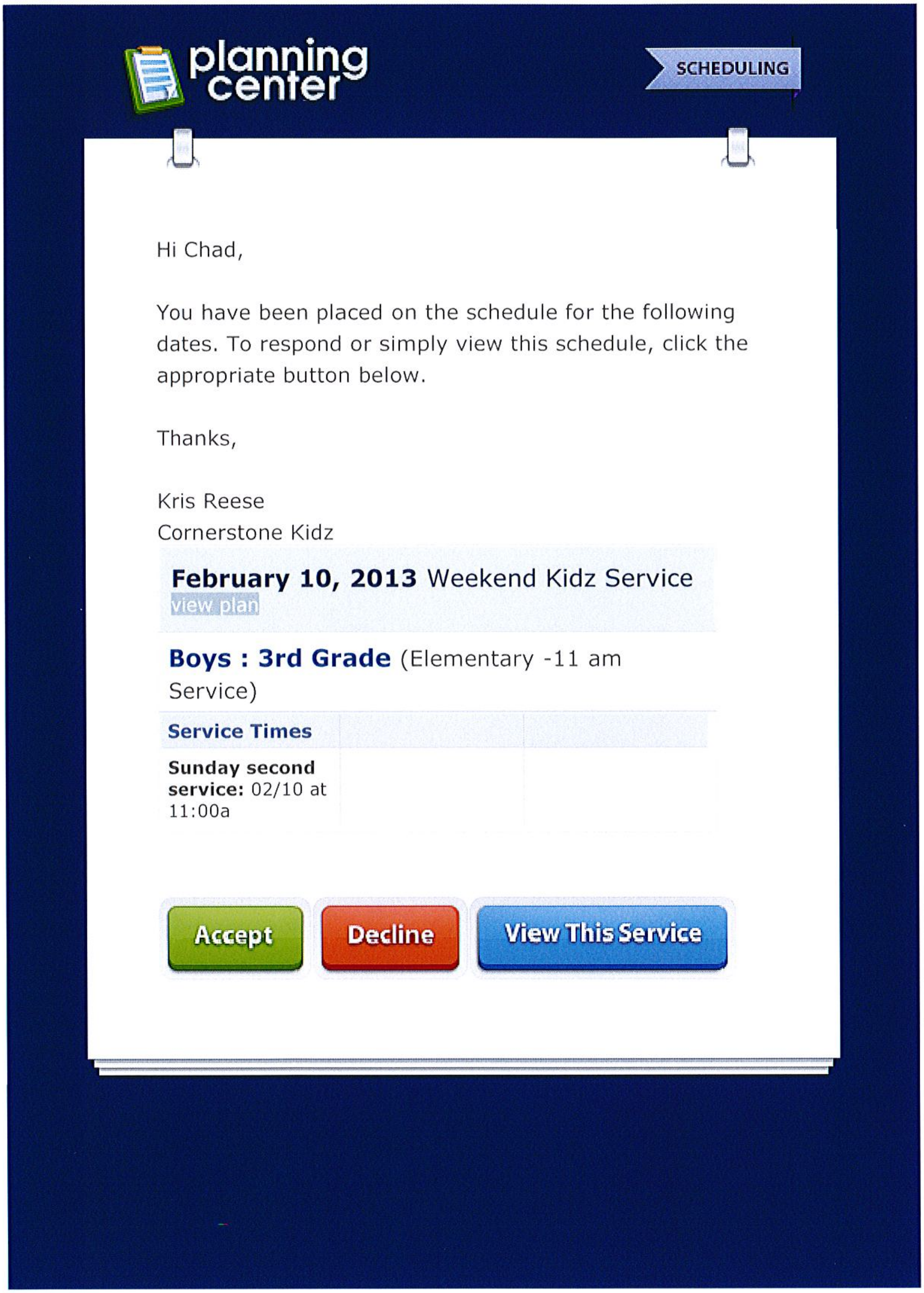
Indicate Starting On date and time, and Ending On date and time. If you prefer, add a reason. If you would like this date to repeat, you can choose from the selected options. When finished, click Accept.

To delete a block-out date, click on the date(s).

For an individual date, just click 'delete' in the bottom left corner.



Responding to email requests:


planning center
SCHEDULING

Hi Chad,

You have been placed on the schedule for the following dates. To respond or simply view this schedule, click the appropriate button below.

Thanks,

Kris Reese
Cornerstone Kidz

February 10, 2013 Weekend Kidz Service
view plan

Boys : 3rd Grade (Elementary -11 am Service)

Service Times		
Sunday second service: 02/10 at 11:00a		

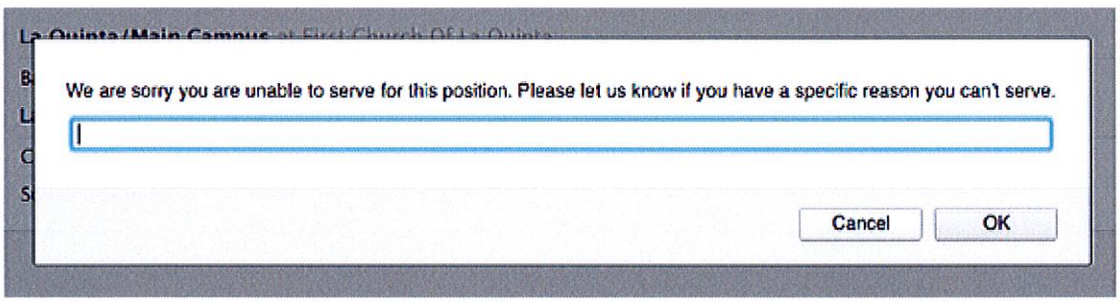
Accept | Decline | View This Service

When you receive your email, click Accept, Decline, or View This Service.

Anatomy of the Notification Email:

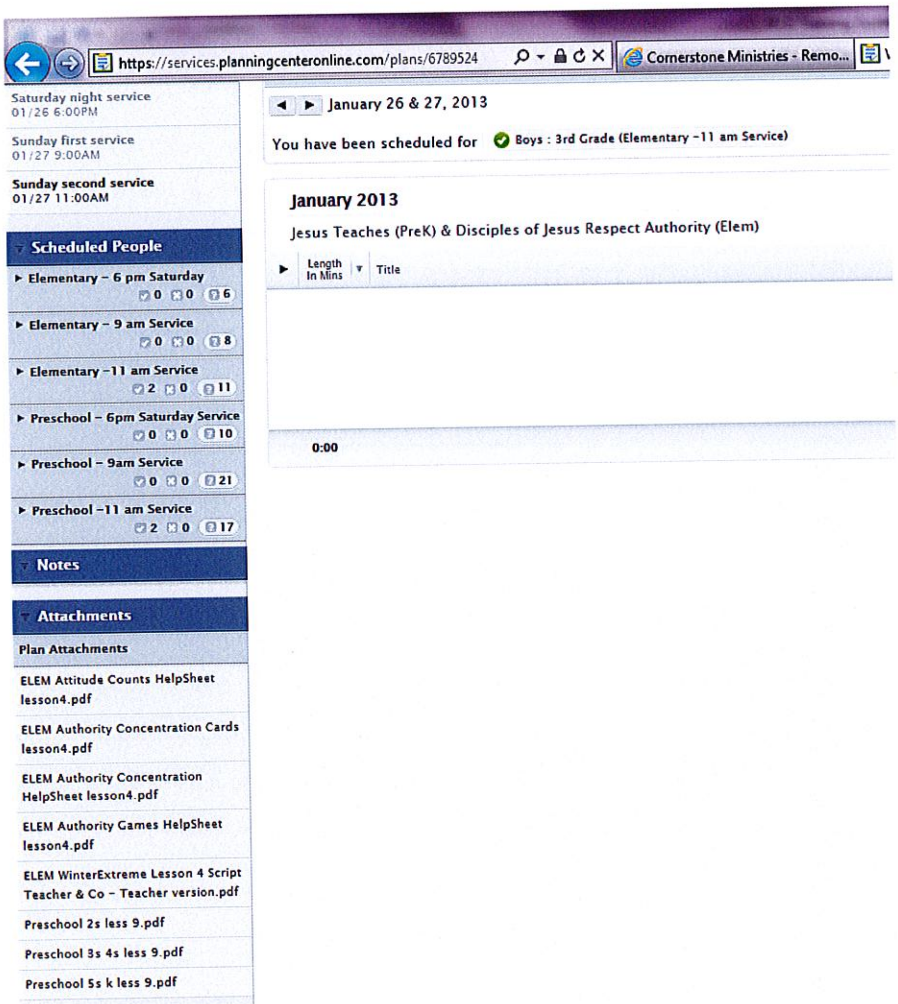
1. The blue banner through the middle of your email tells you the date and the name of the service you are scheduled for. It also gives you a link right there to view this plan without responding.
2. This shows you what position you're scheduled for.
3. Here all of the service, rehearsal, and any "other" times are displayed. These are times that your leader has made you responsible for.
4. Response Buttons: these large buttons prompt you to respond in some way. If you are an editor or administrator, clicking one of these buttons will require you to login (this is for security purposes). If you have other permissions, just click the button to respond.

If You Decline:



If you are declining this service, it will give you the option to send a reason. If you do not want to give a reason, you still have to click 'decline and send reason' or 'OK' in order for this response to go through.

How to download weekly lessons:



From your dashboard, select the week that you want lessons for by clicking on the date under Weekend Kidz Service.

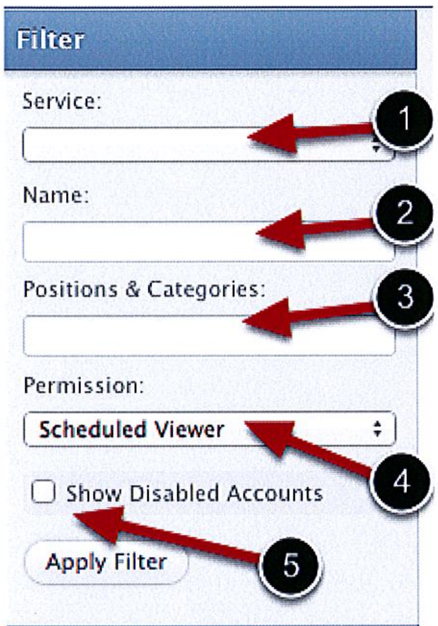
Under Attachments, on the lefthand column you will find all the lessons for that week.

Click on the lesson you want to download. Open or Save that lesson once the dialogue box appears.

How to search for volunteers/replacements/switches:

Go to Peoples Tab at top of your screen.

Filter by selecting information.



1- You can filter by service by clicking the drop-down arrow and choosing a service. This will show you a filtered list of anyone who has ever been scheduled for that particular service before. This does not filter by custom property in any way- just by dates scheduled.

2- You can filter by first or last name. If you only remember a first or last name, just enter that and click "Filter". It will bring up anyone in the system with that name.

3- You can filter by Positions & Categories, if you are looking for a specific team or quality

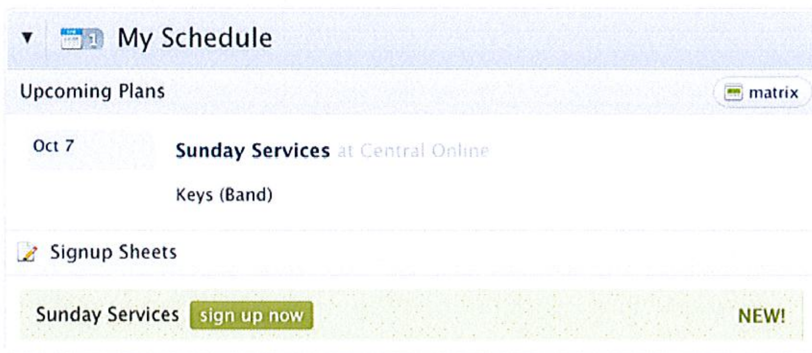
4- You can filter by the permission level of your volunteers

5- You can see disabled accounts by checking the box to "Show Disabled Accounts" and then clicking Filter.

To send an email to someone, click on their email address and fill in the information on the email template.

Signup Sheets:

Viewing Available Signup Sheets



As soon as Signup Sheets are enabled, users who can sign up will immediately see a link to the Signup Sheet on their dashboard. Each Service Type has one signup sheet which will show signups for any categories with Signups enabled. If a signup sheet has dates the user hasn't seen before, the signup sheet will be in green and have say NEW!.

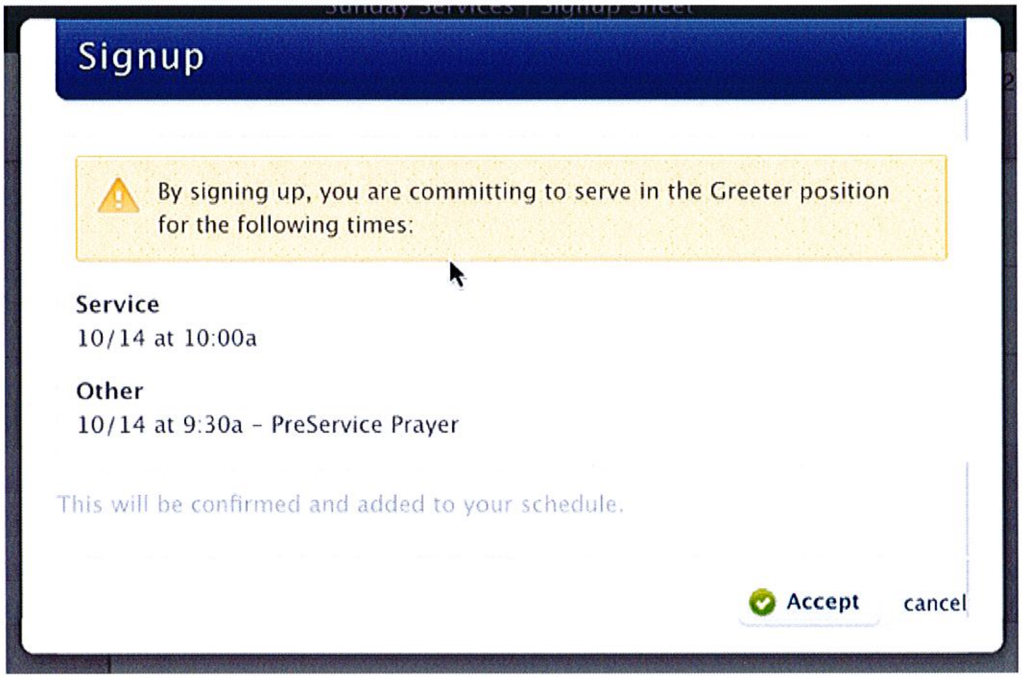
Click the "sign up now" button to sign up.

Signing Up

Each user will see a "signup now" button" for any position they are assigned to. Any People Categories they are assigned to will be at the top of the Signup Sheet, but other service information like Order of Service, Plan Notes and other People Categories can be viewed at the bottom of the Signup Sheet by clicking to expand each section.

Signup Sheets are *only* used for signing up. Users with higher permissions won't see anything different than other users, they'll only see buttons to signup for positions they are assigned to.

Confirm your choice

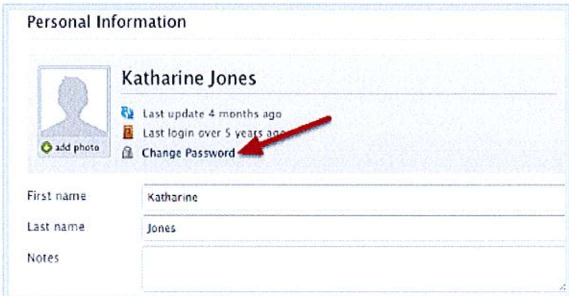


When a user clicks 'sign up now', they will see all the times associated with that position with a note to let them know they are confirming this date and committing to this position. If they click Accept, they will be added to the plan and set to confirmed. If they have any conflicts, they will see those here, too.

Last Updated
Dec 06, 2012

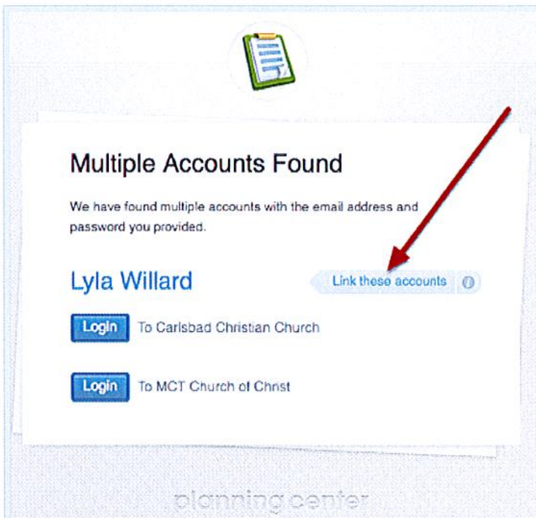
Download Lesson PDF
Download Manual PDF

Set all passwords for each account to the exact same, and make sure your usernames are the same as well.



Once you've logged into an account and clicked your name in the upper right corner, click Change Password. Set each password for each account to the exact same.

When you login with the same username and password, you will be asked if you would like to link accounts.



Just click on "link these accounts" if you would like to link them, or click login if you would prefer to keep them unlinked but still have one username or password for both.

Once your accounts are linked, you can switch back and forth between them by clicking on 'accounts' in the upper right.

The green box shows the current account you are in, and clicking on any of the other account names will switch you to that account.

Clicking on the 'logout' button will log you out of all of your accounts.

PREV: FORGOTTEN PASSWORD, LOGIN ISSUES AND ERROR MESSAGE