

# Reference Guide

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Login to Planning Center

[www.Planningcenteronline.com](http://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.

**Schedule**

November 27, 2011  
Weekend Experience (North Campus)

12/09/2011 to 12/09/2011  
Concert

December 29, 2011  
a Quinta/Main Campus

January 5, 2012  
a Quinta/Main Campus

January 19, 2012  
a Quinta/Main Campus

February 2, 2012  
a Quinta/Main Campus

February 23, 2012  
a Quinta/Main Campus

March 1, 2012  
a Quinta/Main Campus

[View past schedule](#)

[Block out dates](#)

**Recent Emails**

7 minutes ago:  
Tester ScheduledViewer has declined for January 5, 2012

5 days ago:  
Test EMail, please ignore


13 days ago:  
November 27, 2011 Request

14 days ago:  
December 29, 2011 Request

**People** Reagan Helms

[Personal Information](#) [Assignments & Permissions](#)

**Personal Information**

 **Reagan Helms**

Last update 13 days ago  
Last login 3 minutes ago

[add photo](#) [Change Password](#)

First name Reagan

Last name Helms

Notes

Notes are only visible & editable by schedulers.

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**

### Contact Information

The screenshot shows a 'Contact Information' form with four numbered callouts: 1 points to the email address input field containing 'reagan@ministrycentered.com'; 2 points to the address input field containing '2790 Gateway Rd.'; 3 points to the phone number input field containing '760-555-1212' and the 'Enable Text Messaging' checkbox; 4 points to the 'Anniversary' date input field.

Email Addresses Add email +

Home reagan@ministrycentered.com 1

Addresses Add address +

Home 2790 Gateway Rd. 2

Carlsbad CA 92009

Phone Numbers Add phone +

Mobile 760-555-1212 3

☒ Enable Text Messaging AT&T

☒ Scheduling Emails ☒ Scheduling Replies ☒ General Emails

Dates 4

Birth Date Anniversary

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.**

**Personal Information** **Assignments**

**Assigned Positions**

Schedule me up to **Any** times a month

Category	Positions	Schedule
<b>Weekend Kidz Service</b>		
Elementary -11 am Service	Boys : 3rd Grade	Choose Weeks <input type="checkbox"/> 1st <input type="checkbox"/> 2nd <input type="checkbox"/> 3rd <input checked="" type="checkbox"/> 4th <input type="checkbox"/> 5th
Preschool -11 am Service	Storyteller	Choose Weeks <input type="checkbox"/> 1st <input type="checkbox"/> 2nd <input checked="" type="checkbox"/> 3rd <input type="checkbox"/> 4th <input type="checkbox"/> 5th

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

Central Online

**My Calendar** 4

October, 2012

S M T W T F S

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

View Master Calendar

Block-out dates

Calendar Integrations

**Recent News**

Introducing Planning Center  
[Zoom](#)

**My Schedule** 2

Upcoming Plans matrix

**Pending Requests** accept all 1

Oct 7 **Sunday Services** at Central Online  
Keys (Band) accept decline

Oct 14 **Sunday Services** at Central Online 2  
Keys (Band)  
Greeter (First Impressions)

**Signup Sheets** 3

**Sunday Services** sign up now October 07 - October 14

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.

Contemporary Service  
October 20, 21, 2012 & October 21, 2013  
Contemporary Service  
October 28, 2011 & October 28, 2012  
Contemporary Service  
November 4, 2011 & November 4, 2012  
Contemporary Service  
[View past schedule](#)  
[Block out dates](#)

**Recent Emails**  
2 days ago:

**Katie Willard**

Last update 9 days ago  
Last login 1 minute ago  
[Change Password](#)

First name: Katie  
Last name: Willard  
Notes:   
Notes are only visible & editable by schedulers.

### Indicate dates to block out.

**Block Out Dates**

For: **Katie Willard**  
pick a different person clear

Starting On  
11/27/2011 at the beginning of the day

Ending On  
11/27/2011 at the end of the day

Reason

Repeat  
☒ None  
☐ Every Sunday  
☐ Every Fourth Sunday

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).

Schedule
April 19, 2011 Contemporary Service
November 18 & 19, 2011 Contemporary Service
November 25 & 26, 2011 Contemporary Service
11/27/2011 to 11/27/2011
December 2 & 3, 2011 Contemporary Service
12/25/2011 to 12/25/2011 Out of town with family for Christmas
October 20, 21, 2012 & October 21, 2013 Contemporary Service


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

### Block Out Dates

Starting On

 at



Ending On

 at

Reason

delete

## Responding to email requests:



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		
<b>Sunday second service:</b> 02/10 at 11:00a		

Accept

Decline

View This Service

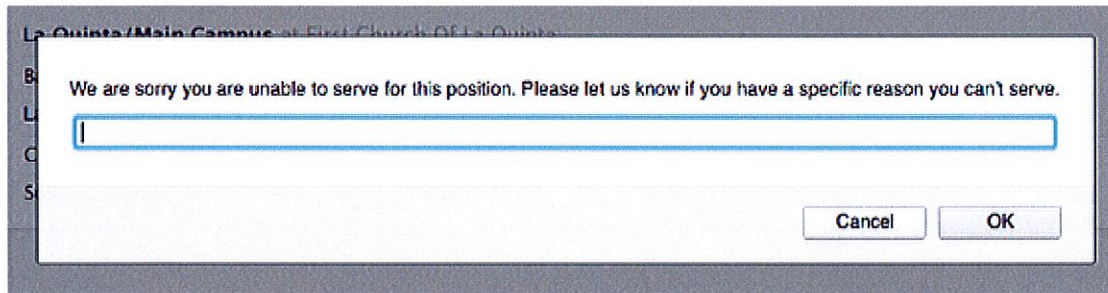


## When you receive your email, click **Accept**, **Decline**, or **View This Service**.

### 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:

A screenshot of a web form titled "La Quinta/Main Campus at First Church of La Quinta". The form contains a text input field with the placeholder text "We are sorry you are unable to serve for this position. Please let us know if you have a specific reason you can't serve." Below the input field are two buttons: "Cancel" and "OK".

La Quinta/Main Campus at First Church of La Quinta

We are sorry you are unable to serve for this position. Please let us know if you have a specific reason you can't serve.

Cancel OK

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:

The screenshot shows a web browser window with the URL <https://services.planningcenteronline.com/plans/6789524>. The page displays a sidebar on the left with navigation options: Saturday night service (01/26 6:00PM), Sunday first service (01/27 9:00AM), and Sunday second service (01/27 11:00AM). Below these are sections for Scheduled People, Notes, and Attachments. The Attachments section lists several PDF files for download, including ELEM Attitude Counts HelpSheet lesson4.pdf, ELEM Authority Concentration Cards lesson4.pdf, ELEM Authority Concentration HelpSheet lesson4.pdf, ELEM Authority Games HelpSheet lesson4.pdf, ELEM WinterExtreme Lesson 4 Script Teacher & Co - Teacher version.pdf, and three preschool lesson plans (2s, 3s 4s, and 5s k less 9.pdf). The main content area on the right shows the selected date range of January 26 & 27, 2013, and indicates that the user is scheduled for Boys: 3rd Grade (Elementary -11 am Service). Below this, a table lists lessons for January 2013, with the first lesson being Jesus Teaches (PreK) & Disciples of Jesus Respect Authority (Elem). The table has columns for Length In Mins and Title. The first lesson has a length of 0:00.

Length In Mins	Title
0:00	Jesus Teaches (PreK) & Disciples of Jesus Respect Authority (Elem)

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

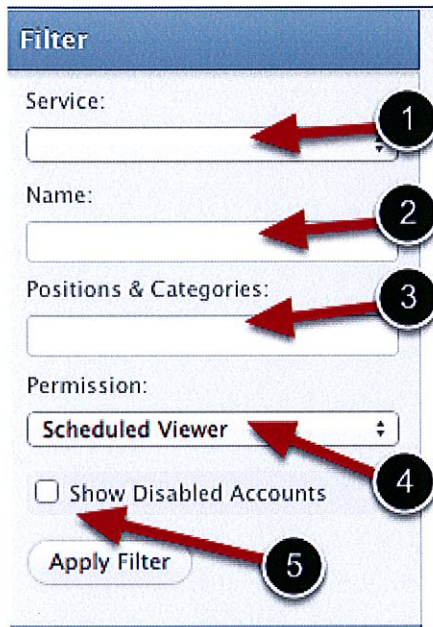
Under Attachments, on the lefthand column you will find all the lessons for that week.

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.



The screenshot shows a 'Filter' panel with the following elements and numbered arrows:

- 1**: Points to the 'Service:' drop-down menu.
- 2**: Points to the 'Name:' text input field.
- 3**: Points to the 'Positions & Categories:' text input field.
- 4**: Points to the 'Permission:' drop-down menu, which currently shows 'Scheduled Viewer'.
- 5**: Points to the 'Apply Filter' button.

There is also an unchecked checkbox labeled 'Show Disabled Accounts' located between the 'Permission' and 'Apply Filter' elements.

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

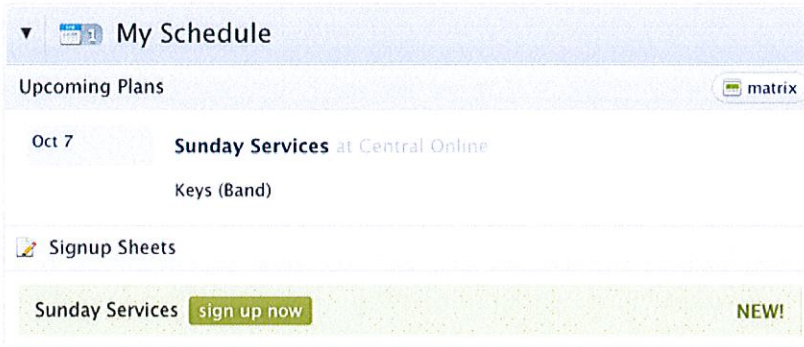
5- You can see disabled accounts by checking the box to "Show Disabled Accounts" and then clicking Filter.

**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

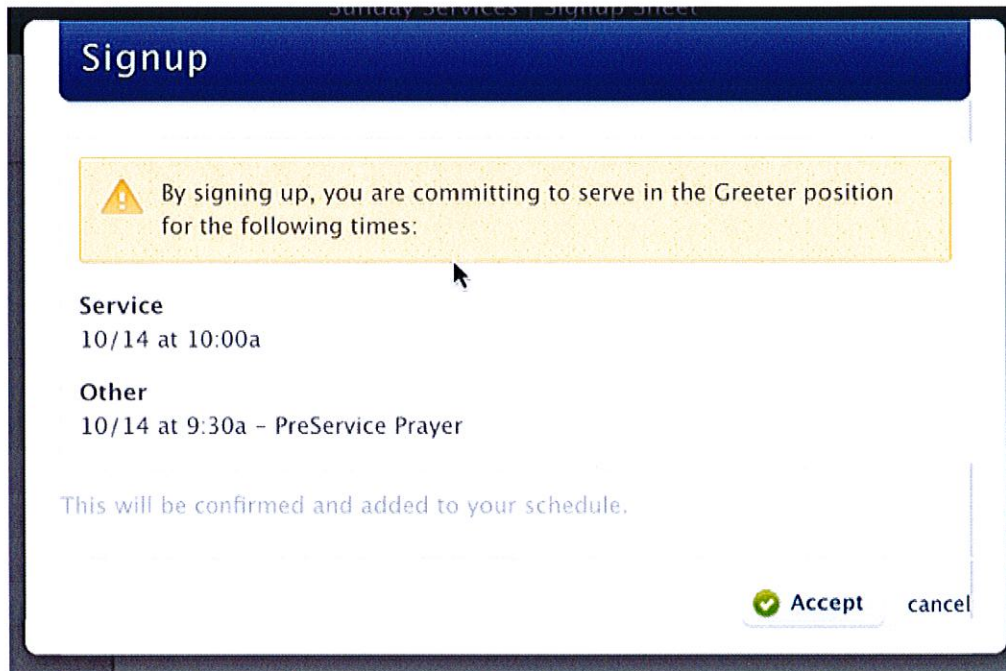
The screenshot shows the 'Sunday Services | Signup Sheet' interface. It features a table with two columns for dates: 'November 25, 2012' and 'December 10, 2012'. The table lists various roles and the people assigned to them. An orange arrow points to the 'sign up now' button for the 'Greeter' role on November 25, 2012.

	November 25, 2012	December 10, 2012
Series Title	Giving Thanks	The Road to Bethlehem
Plan Title		
Band		
Acoustic Guitar	✓ Reagan Helms	✓ Reagan Helms
Bass Guitar		
Drums		
Electric Guitar		
Keys	✓ Aaron Stewart	✓ Aaron Stewart
First Impressions		
Greeter	sign up now	sign up now
Kiosk		
Usher		
▶ Order Of Service		
▶ Plan Notes		
▶ Audio/Visual		

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



**Signup**

By signing up, you are committing to serve in the Greeter position for the following times:

**Service**  
10/14 at 10:00a

**Other**  
10/14 at 9:30a - PreService Prayer

This will be confirmed and added to your schedule.

☒ Accept

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.

Setting Up	6
Account Administration	12
Apps	3
Attachments	6
The Matrix	4
Media	4
Music Stand	15
Personal Profiles	11
People	15
Plans	22
Projector	18
Reporting	3
Scheduling	19
Service Types & The Dashboard	10
Site Settings	5
Songs	21
Templates	4
Troubleshooting	2
Webinars	1

#### 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.

**Personal Information**

 **Katharine Jones**

Last update 4 months ago  
Last login over 5 years ago  
[Change Password](#)

First name: Katharine  
Last name: Jones  
Notes:

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.

**Multiple Accounts Found**

We have found multiple accounts with the email address and password you provided.

**Lyla Willard** [Link these accounts](#)

[Login](#) To Carlsbad Christian Church  
[Login](#) To MCT Church of Christ

planning center

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.

beta on Katharine Jones | First Church Of La  
@ help | 10 accounts

Account Options | [unlink these accounts](#) | [logout](#)

Current: First Church Of La Quinta  
[Switch To](#) MCT Church of Christ

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](#)