PCO Manual

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Getting Started

An Introduction to Planning Center

Planning Center is an online system for scheduling team members, organizing services and streamlining communication. Your church has signed you up, so watch our introduction video or read on to learn how to make the most of your account and know what to expect!

Your Online Schedule

When your church is ready, they will send you scheduling request emails with big buttons to Accept or Decline. You can also login at any time and manage your schedule by visiting planningcenteronline.com. One way you can help your church is to login and block-out dates ahead of time that you know you will be unavailable. If they try to schedule you, they'll see your blocked-out dates and know you won't be able to serve without even having to ask!

Your Contact Information

The great thing about having your own account, is that you can update your email address, password, profile picture or setup text messaging any time you want from your Profile page.

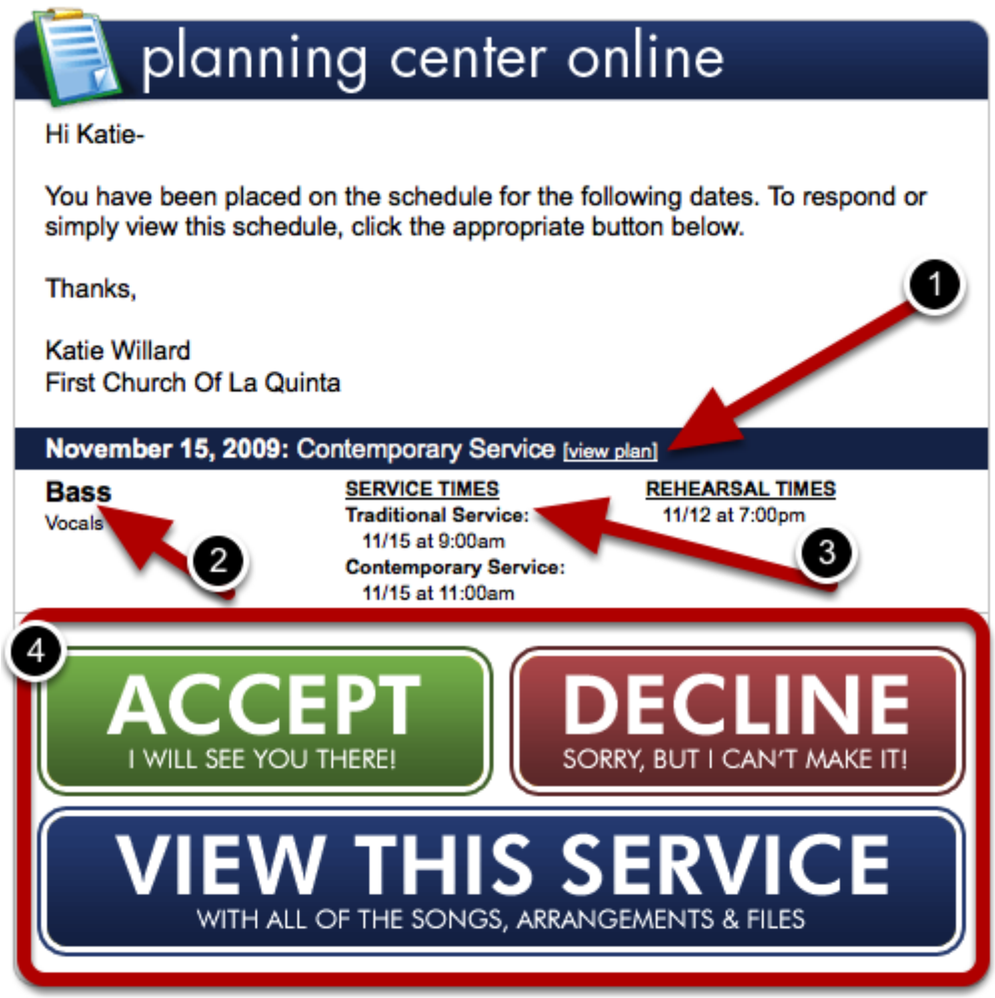
Service Details & Files

Your church might give you access to view services and related files. If they have uploaded files like chord charts, documents, or mp3s, you'll be able to access them by clicking the blue triangle left of any item to expand it. If you are a musician, check out the rehearse button at the top right of each plan to access the media player or to download all chord charts at once.

Responding to Scheduling Emails

This lesson shows you how to respond to scheduling request emails.

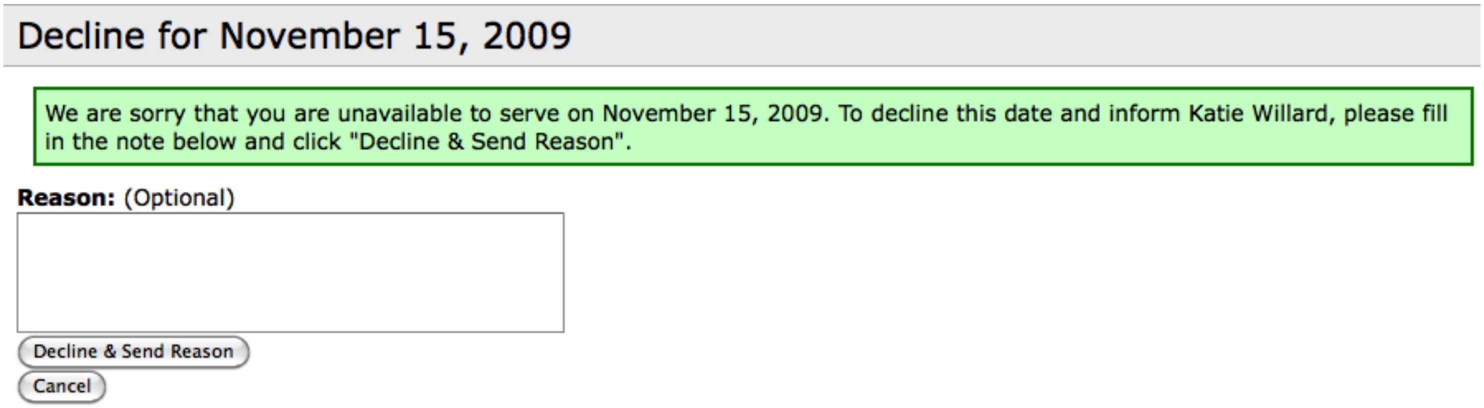
When you receive your email, click Accept, Decline, or View This Service.



Anatomy of the Notification Email:

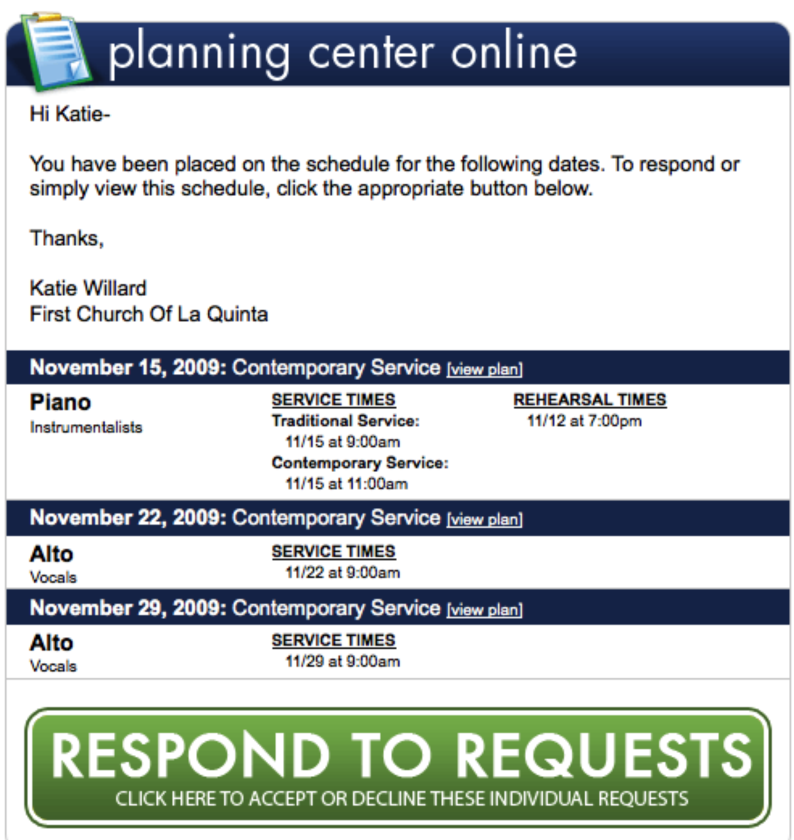
1. The blue banner through the middle of your email tells you the date and the name of the service you are scheduled for. It also gives you a link right there to view this plan without responding.
2. This shows you what position you're scheduled for.
3. Here all of the service, rehearsal, and any "other" 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' in order for this response to go through.

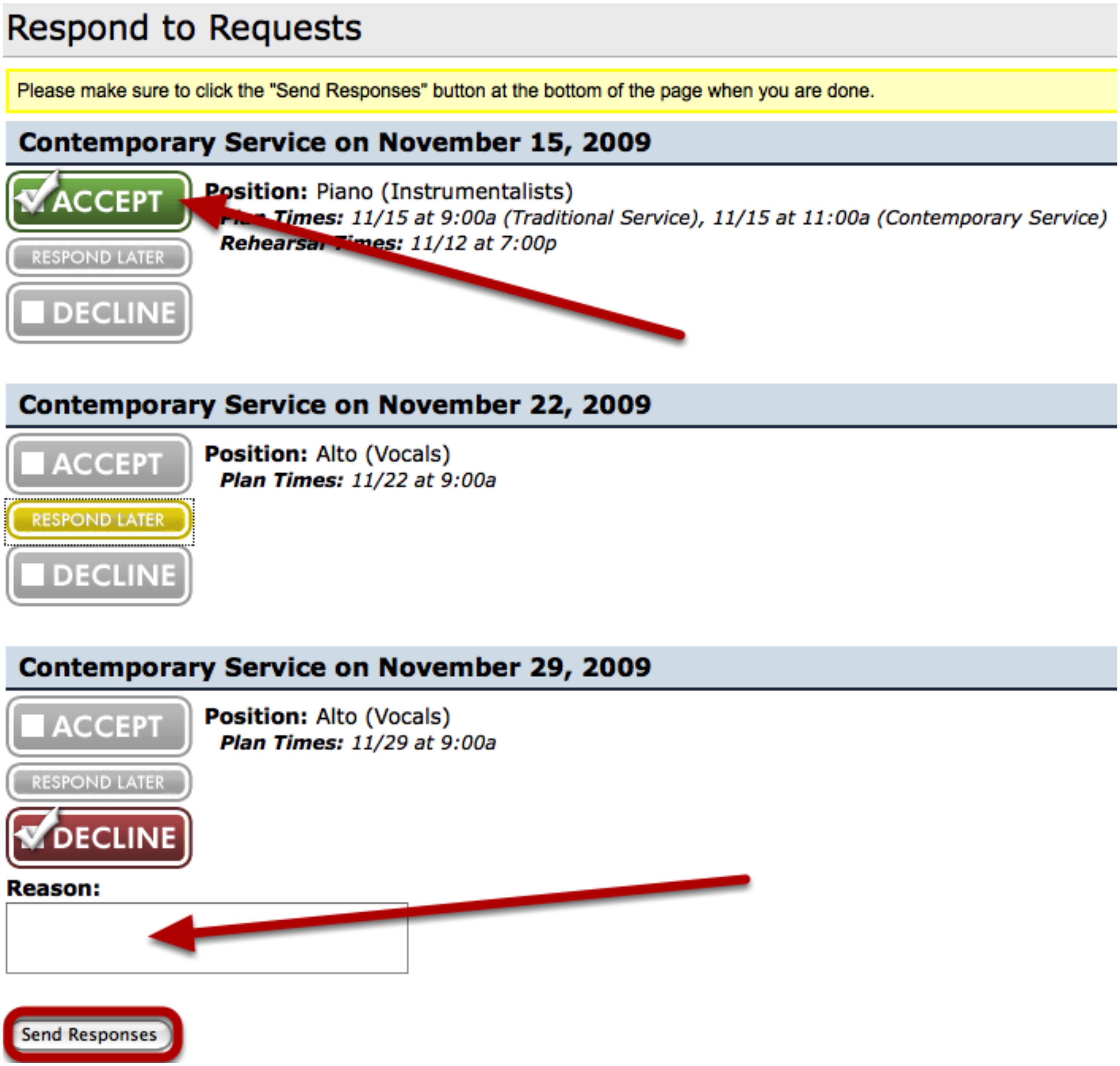
Responding to multiple requests in one email:



Your administrator may choose to send you one email for multiple requests (this cuts back on emails for you!). As you can see above, I have 3 requests in this email, each listed with the dark blue banner running across the page (Nov 15, Nov 22, Nov 29). To respond, click Resopnd To

Requests.

Respond To Each Request.

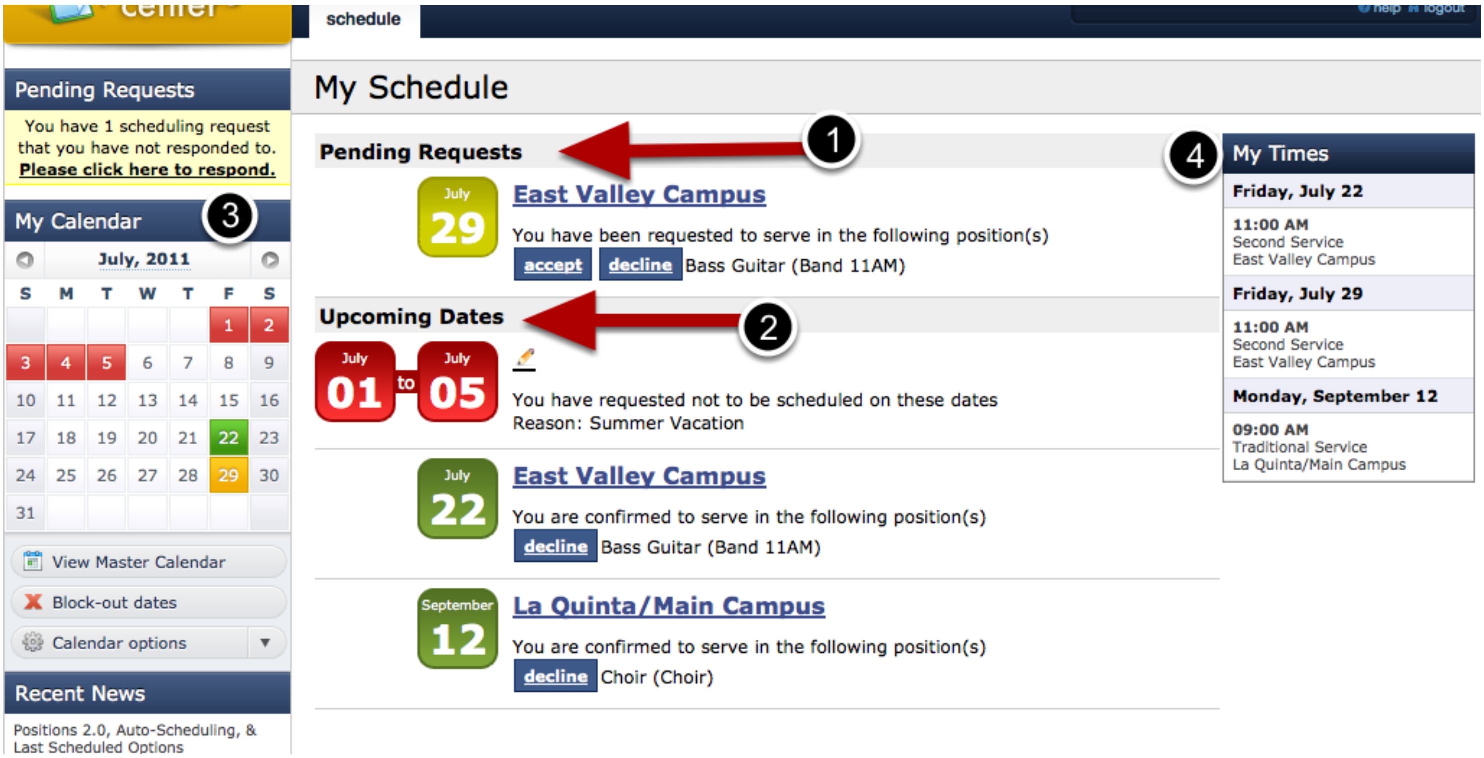


After you click Respond To Requests, all requests are automatically set to Accept, like the first request at the top. I have manually changed the next two to show what it looks like when you choose other options. Just click on the Accept, Respond Later, or Decline button for any request to indicate what your response is. When you're done, give any reasons you need to, then click Send Responses at the bottom.

Managing Your Schedule

This lesson shows you how to accept or decline scheduling requests, view the plans you are a part of, and block-out dates that you know you will be unavailable.

The My Schedule Page

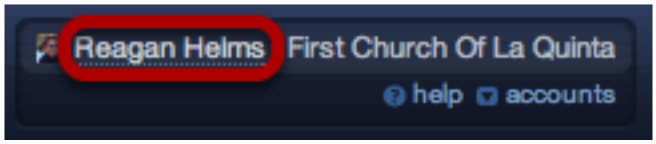


1. **Pending Requests**- You will see a list of the requests that have been sent to you but you have not responded to yet. If someone has added you to their schedule but hasn't sent you an email yet, it will not show up in the Pending Requests area. Respond by clicking 'accept' or 'decline'.
2. **Upcoming Dates**- This section shows you any block-out dates you've entered, or 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 reschedul you. To see the plan, click the name of the service (above, "East Valley Campus" or "La Quinta/Main Campus are both examples).
3. **My Calendar** displays a calendar with color-coded boxes over dates. Green is for any dates you've confirmed. Yellow is for any dates you've been notified of, but haven't yet responded to. Red is for dates you've either declined or blocked out, and grey is for a date that you are not scheduled for.
4. **My Times**- A quick glance at all the times you are scheduled for.

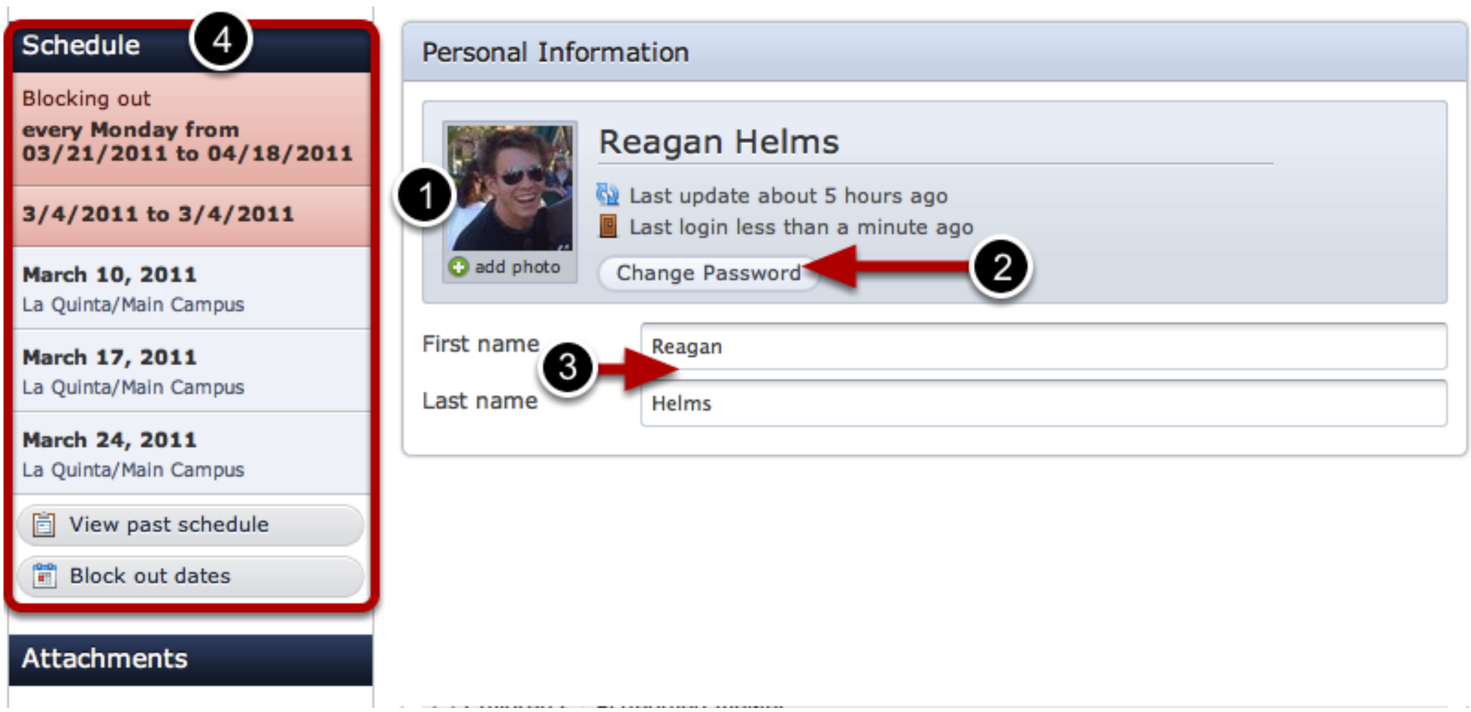
Updating Your Personal Information

Update your email address, change your password, set up text messaging & other personal options from your personal profile page.

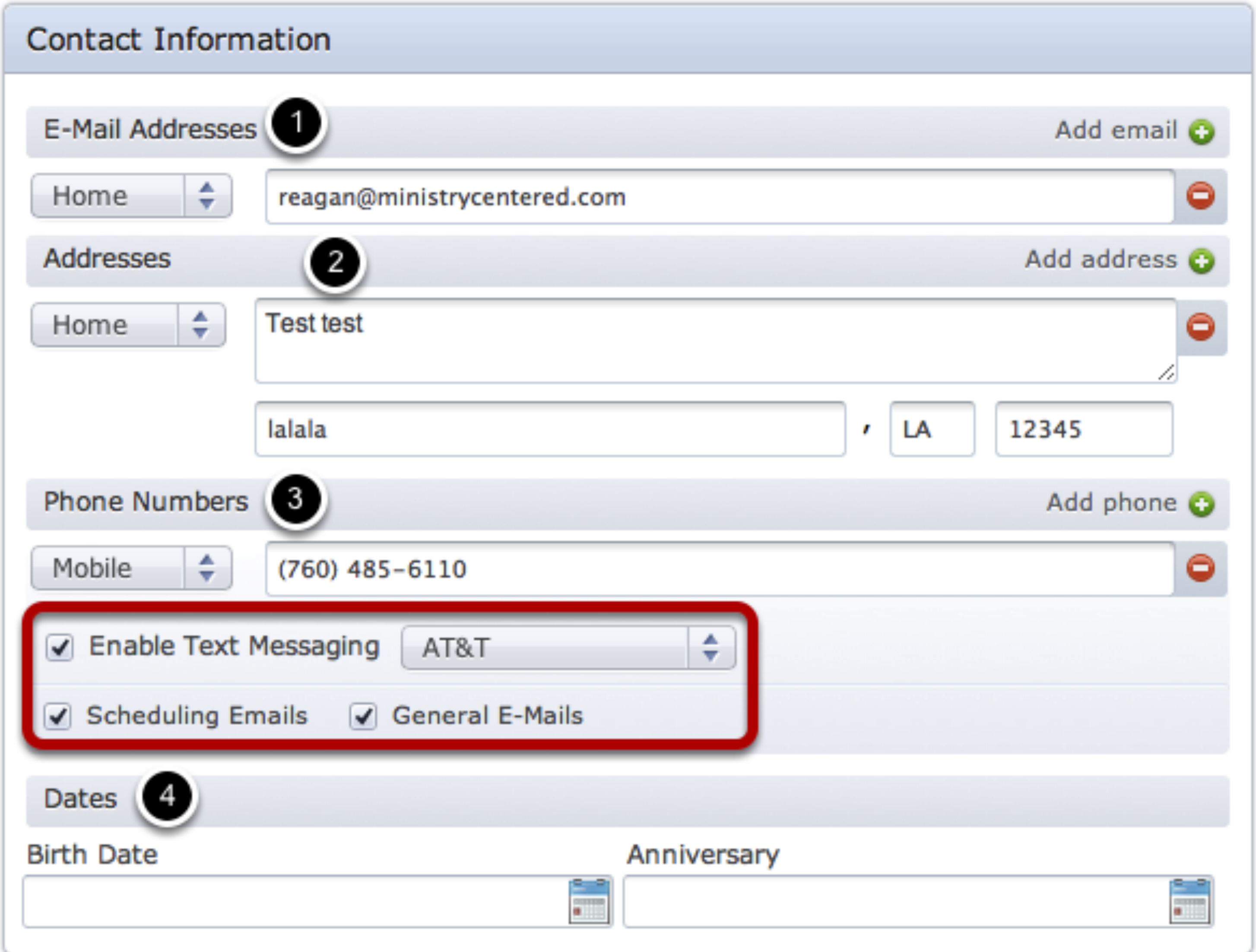
To access your Personal Account Information click on your name in the upper right corner.



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



1. Profile Picture - Upload or change your profile picture
2. 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.
3. Change First or Last name.
4. 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.



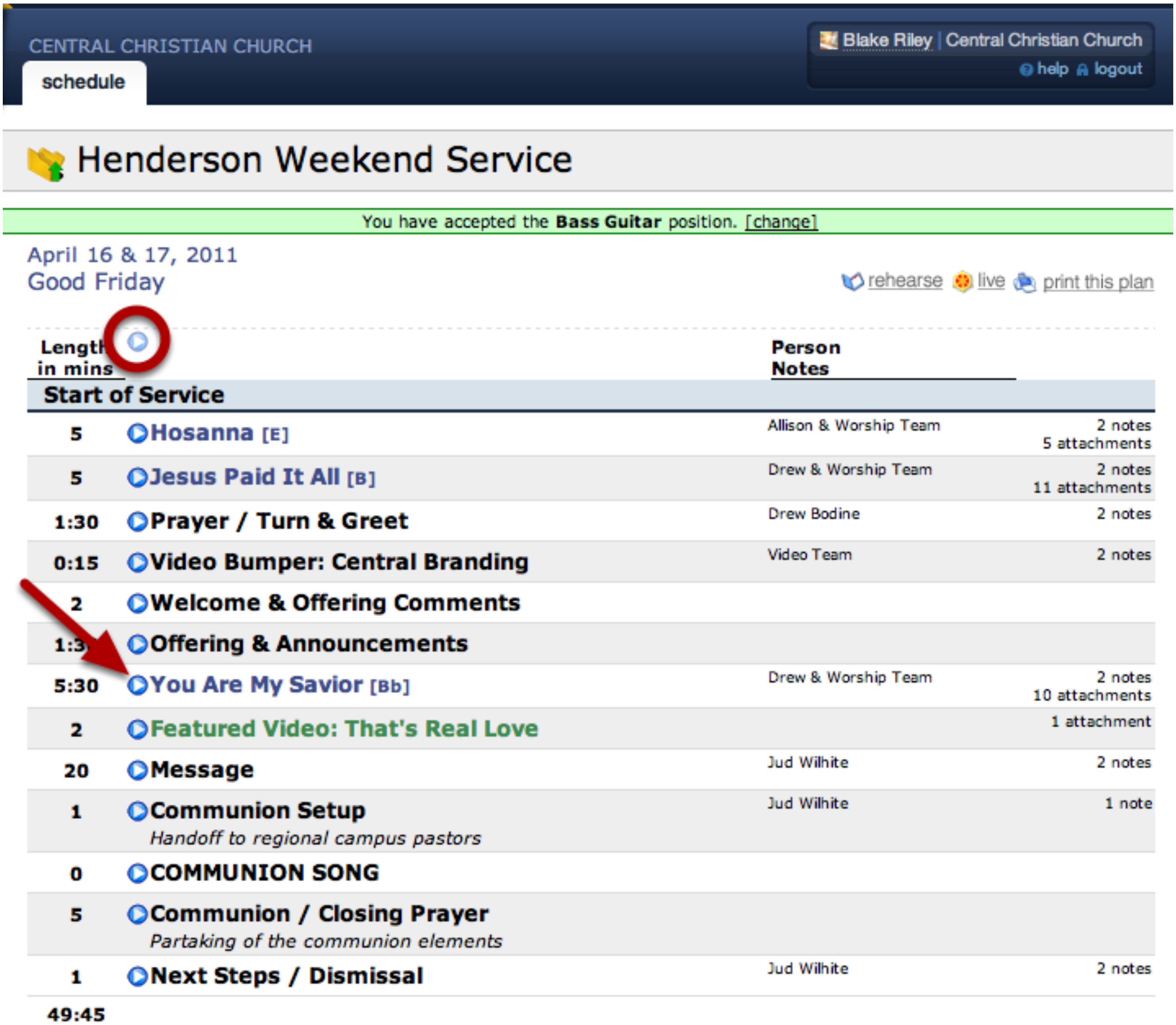
1. Enter or edit email addresses. Click 'Add Another' to add more email addresses or click the red "x" to delete an email address. Any email address you add can be used as your login name. All messages sent from Planning Center will be delivered to all email addresses you add.
2. Enter any physical addresses 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

Viewing Service Details & Files

This lessons shows you how to view service details and expand items so you can see any item notes and access any related files. If you want to know where your music is, this is the lesson for you!

Click the blue arrow to the left of any item to expand it

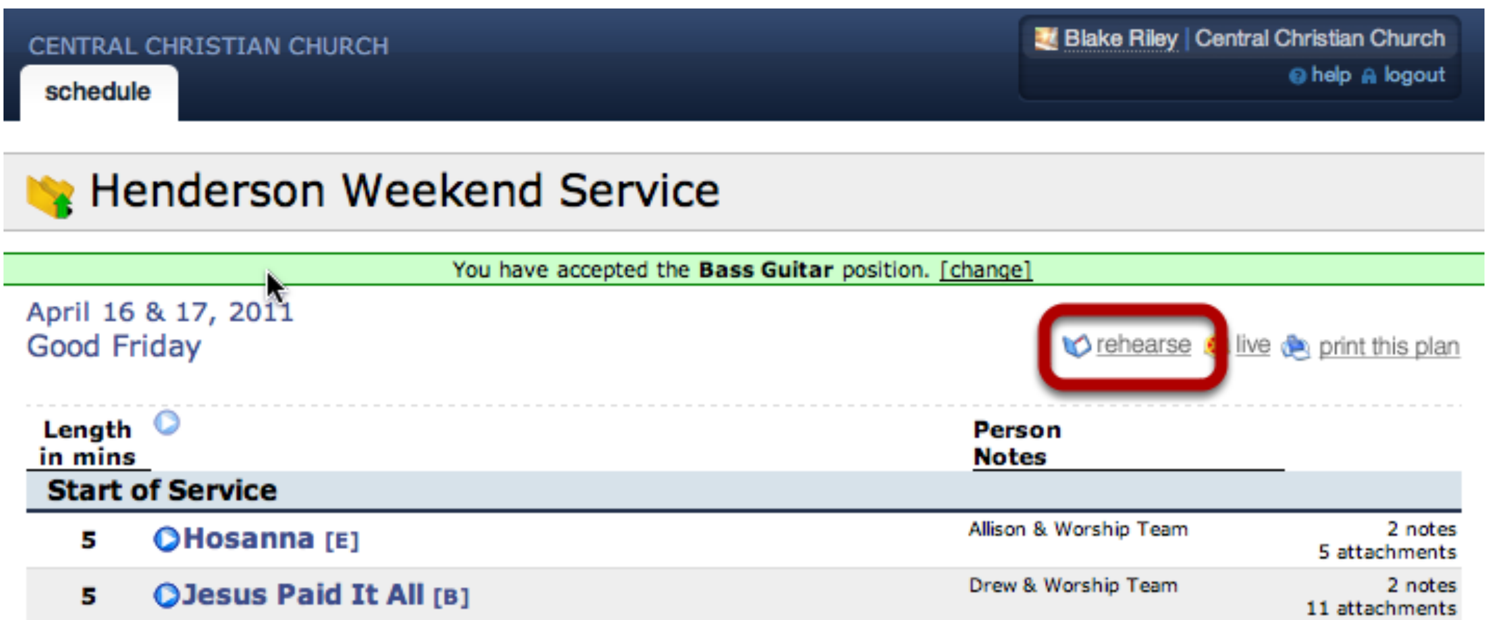


You can also click the faded arrow at the top to expand all items at once.

Click on a file to download or stream it.

Some files can be downloaded and other files can only be streamed. If you have a question about the specific files listed, or if there are no files listed and you think there should be, please contact your ministry leader.

If you are a musician, other options are located under the rehearse button



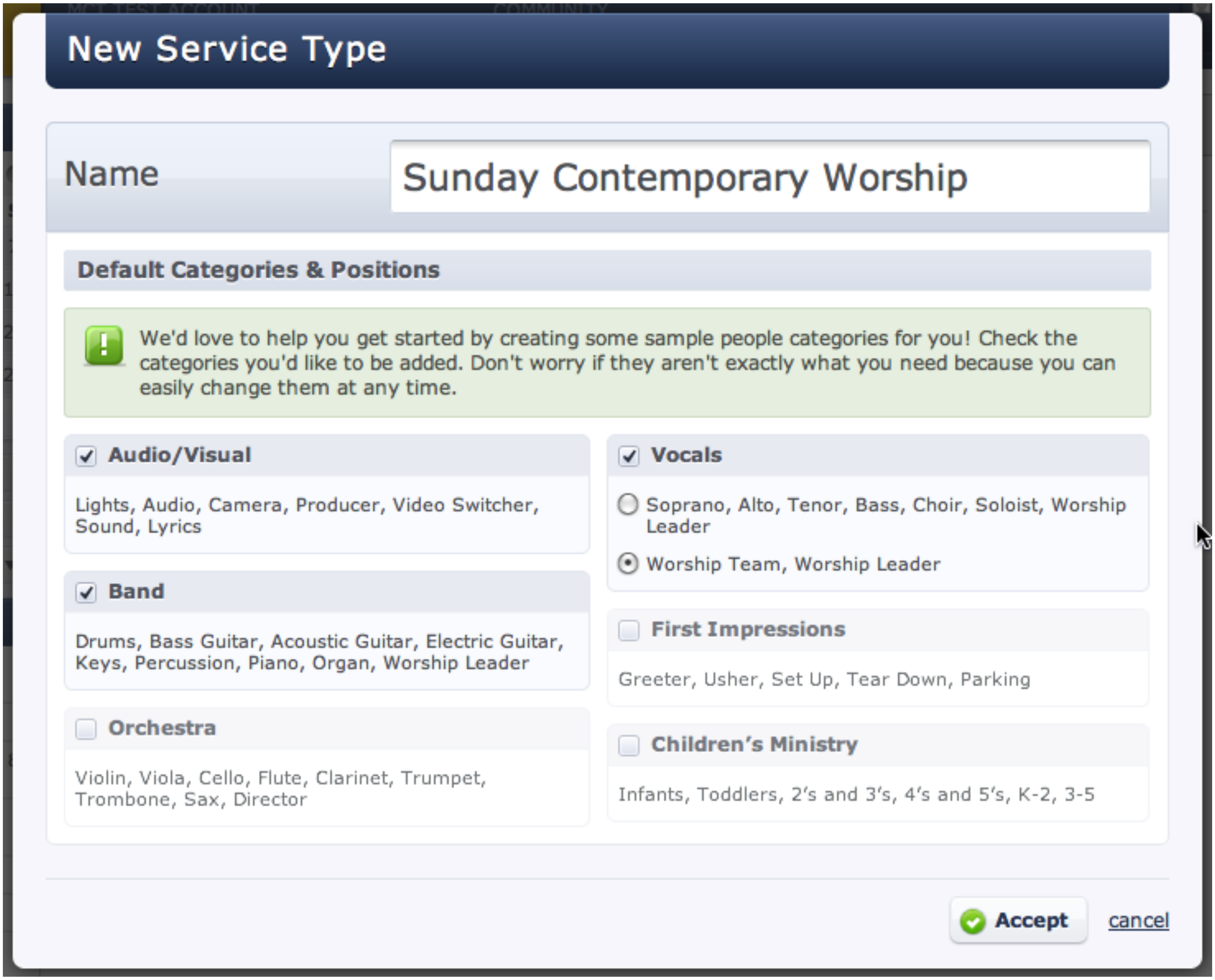
Hover over the rehearse button and then click media player to stream the playlist for this plan. Click on download all PDFs to download all available PDF files in one packet.

Setting Up

Creating A Service Type & Setting Up Dates and Times

This lesson shows new users how to setup their first Service Type by adding Dates & Times.

Your Plans Page: Create A Service Type



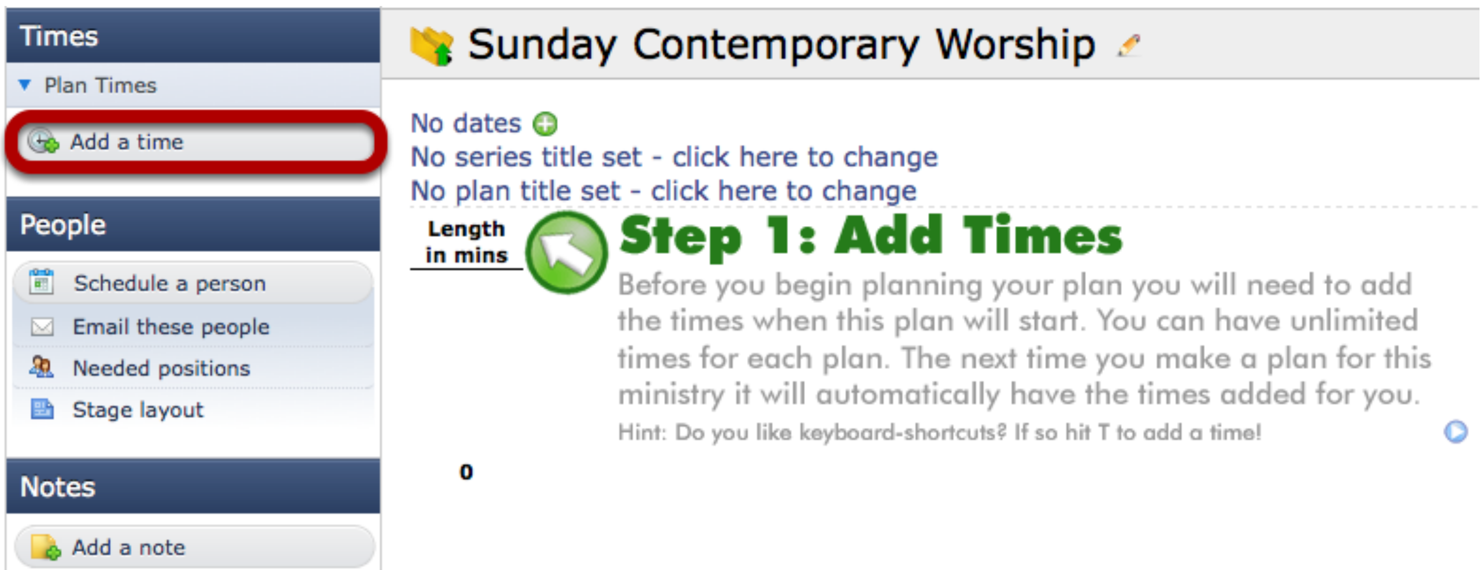
A **Service Type** is a set of plans that are grouped together. Service Types are most commonly used for the different services you advertise or for different ministries in your church. For example, this church has a *Sunday Contemporary Worship Service* that occurs every week at 9:00AM & 10:30AM, and also a *Sunday Traditional Worship Service* in another room also at 9AM. In Planning Center, I will create 2 Service Types. The first will be *Sunday Contemporary Worship* which (since 9AM and 11AM are basically the same thing, I group them into 1 Service Type), and the second will be *Sunday Traditional Worship*.

Name your Service Type a general name, like "Sunday Morning Worship" or "Jr. High Ministry", *not* a specific date, like "September 4, 2005". The plans inside your Service Type, however, *will* have specific dates.

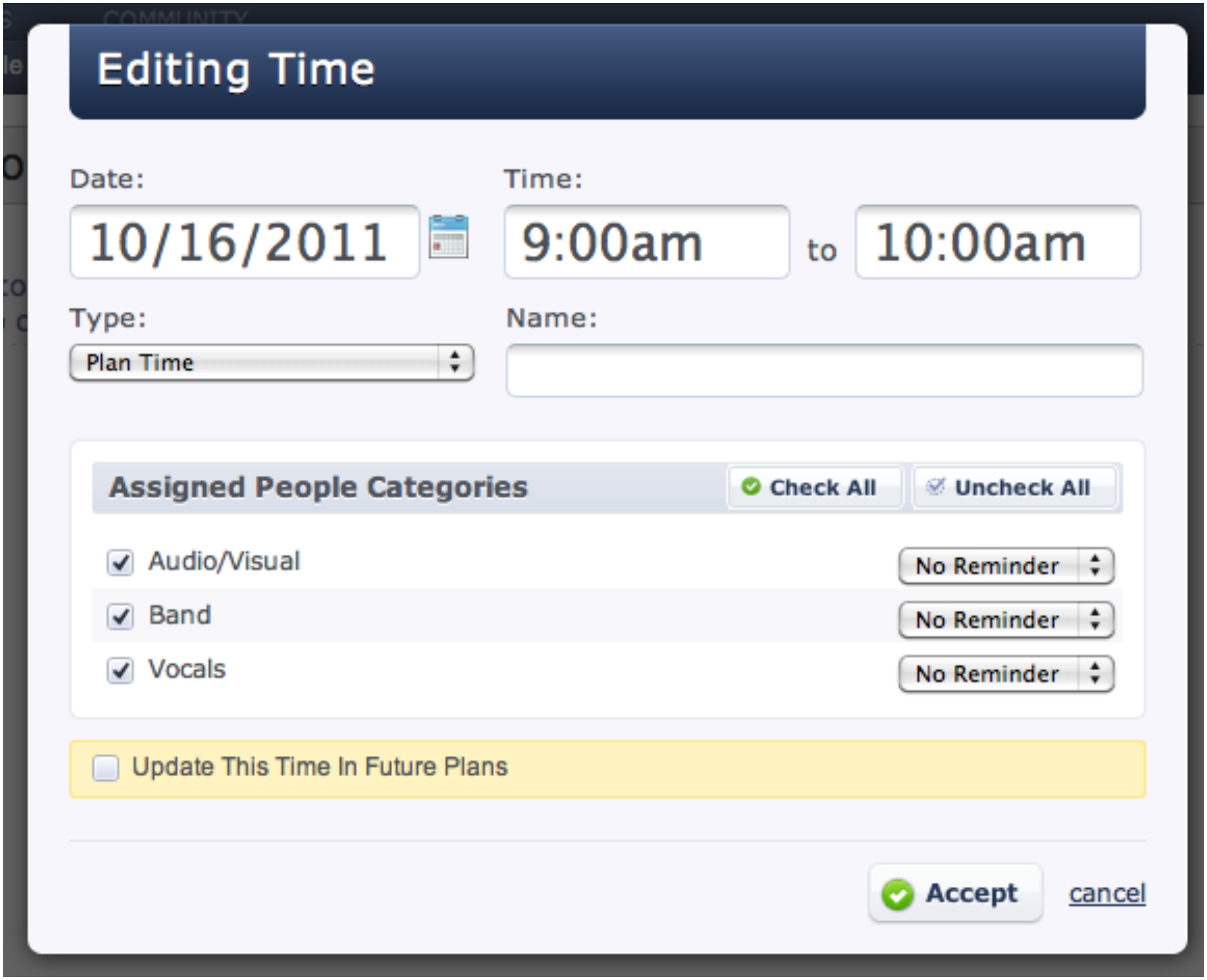
If you plan on scheduling People to each plan in your Serivce Type, you can get a head start by choosing some starter people Categories and Positions. Check any Categories you'd like Planning Center to create for you. Don't worry if they aren't exactly what you need, you can edit them and add more at any time.

Click accept to create your Service Type and your first Plan.

Add Dates & Times to your Plan

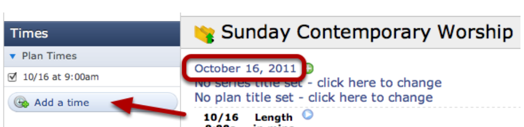


Once you have created your service, it will automatically create a plan called "No dates". To set the dates for your plan, click **Add a time** in the upper left corner. This will allow you to add any times and dates for this plan. Once you add plan times, "No dates" will update to reflect those dates.



Enter the date of your service and then the start and end time. Be careful to pay attention to "am" or "pm". If your service has multiple service times, for instance a 9:00 and a 10:30 service that are the same, just enter the 9:00 start and end time in this box, and then repeat this entire step and add 10:30 as a completely separate time later.

Everything else should be good, so you can click accept. If you want to know what the rest of these options are for, check out our lesson on Adding and Editing Times.



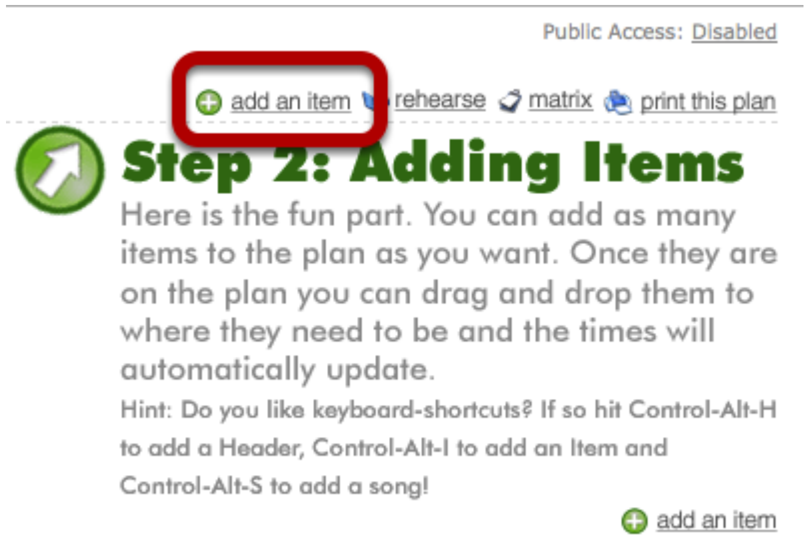
Any **Plan Times** you add are reflected where it previously said 'no dates'.

If you have more times you'd like to setup, continue to Add times as many times as necessary.

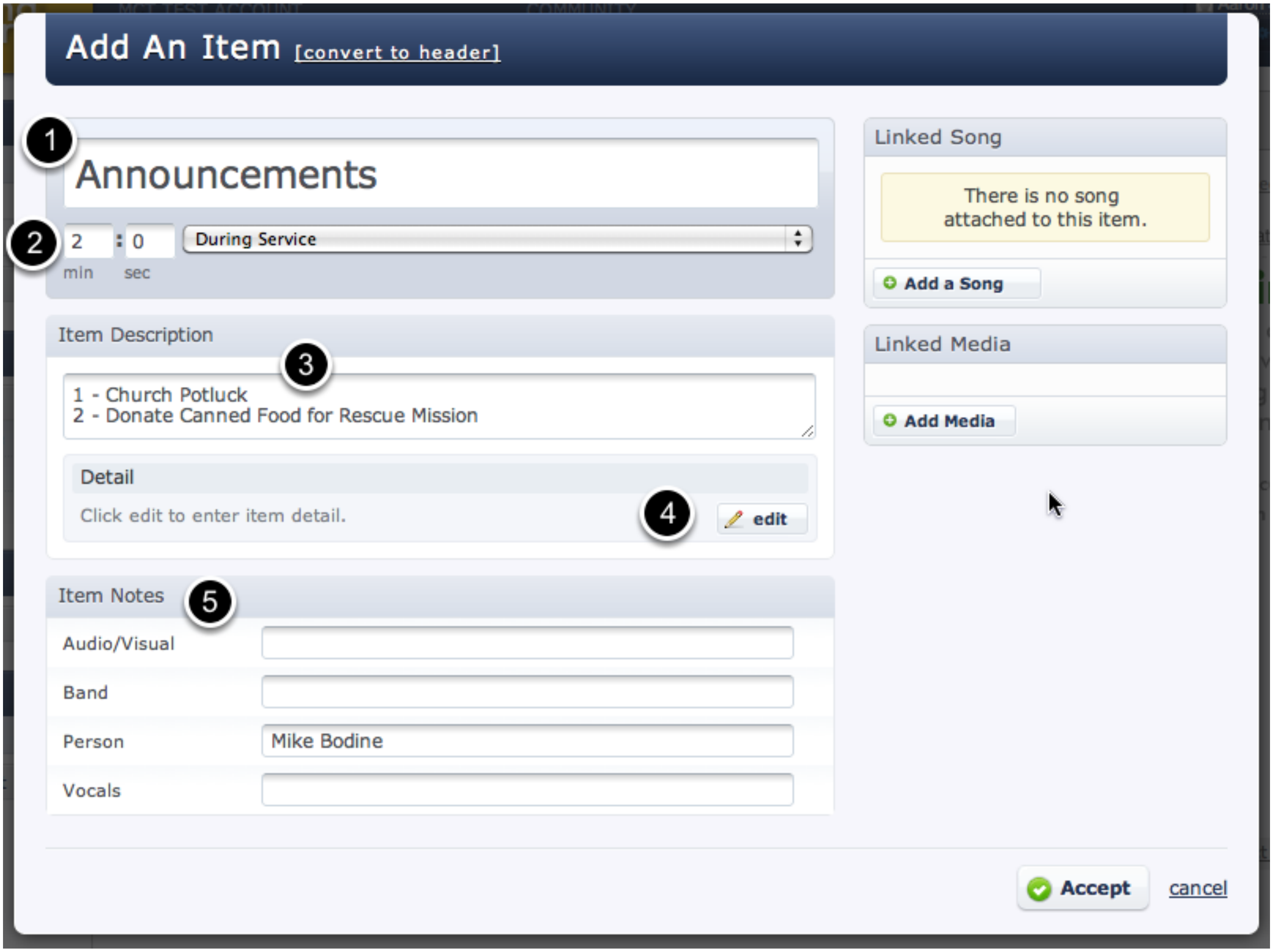
Adding Items to your Plan

This lesson shows you how to add items, songs, media and headers to your plan, and how to reorder them.

Step 2: Adding Items



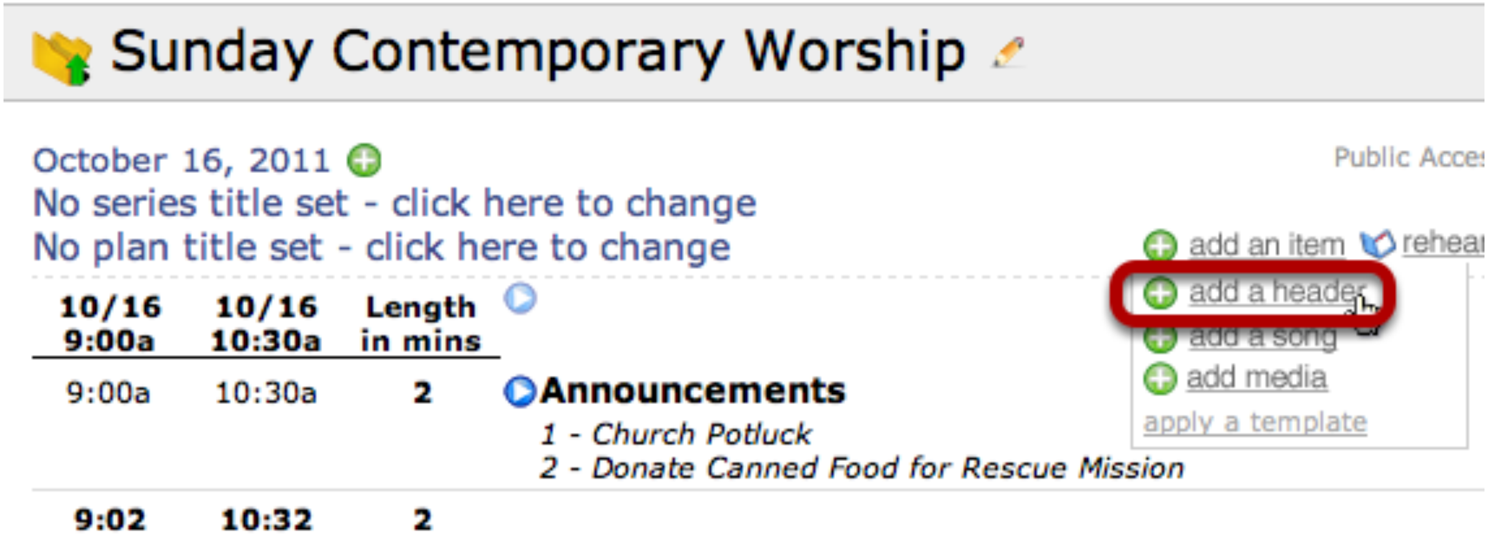
As shown in the picture, the next step is to add items to your plan. Hold your mouse over 'add an item' to see other options, such as add a song, add a media, or add a header. Click "add an item".



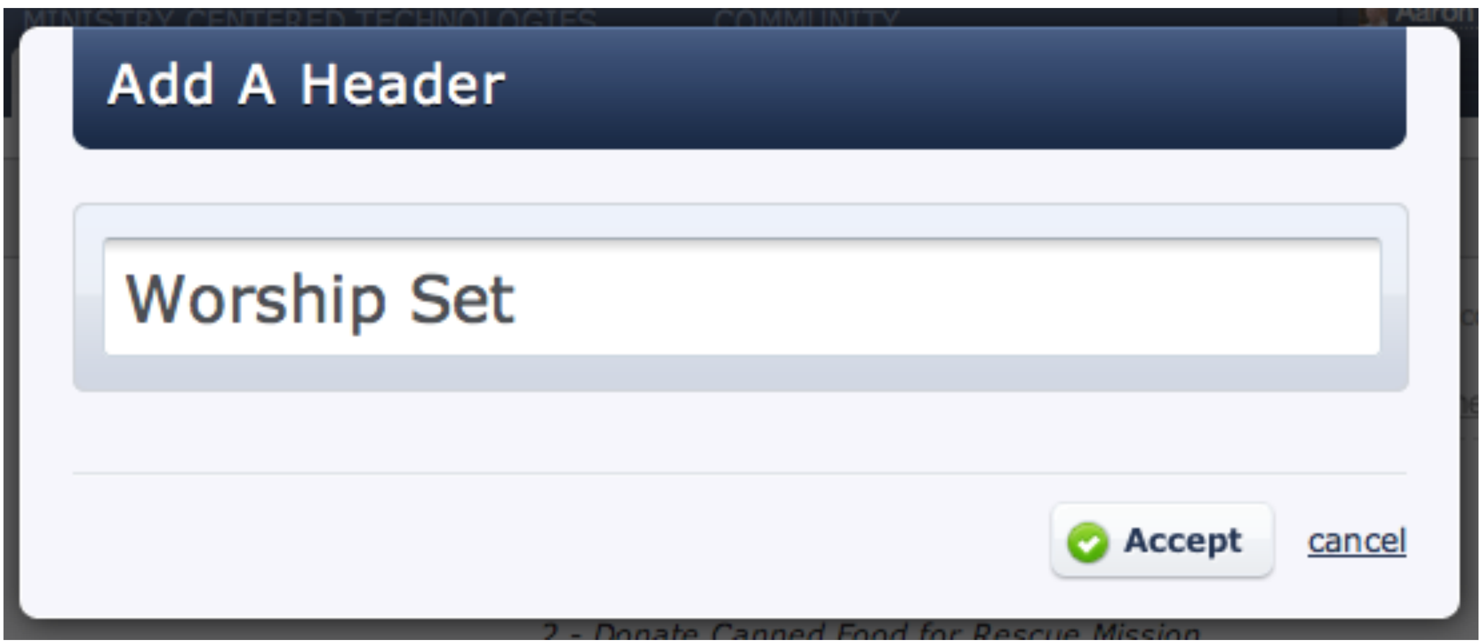
1. Type in the **Item Title** of your item. In this case, I'm titling it "Announcements".
2. Enter the **Item Length** in number of minutes and seconds this item will take, then choose if it's going to take place During Service, or Pre/Post Service (items that are pre or post service will not be included in your total service length).
3. Enter a brief **Item Description** here and it will appear on the Plan page.
4. If you have longer, more detailed information, or want to use rich text formatting to change fonts, colors or text-size and formatting, click to edit the **Item Detail**.
5. **Item Notes**: Here you can add any specific notes in categories. To add or edit these categories, see this lesson.

Click accept when you are done.

Add a Header



Now let's add our first header. Headers are used if you want to visually break up different sections of your plan. Hover over the **add an item** button and click **add a header**.

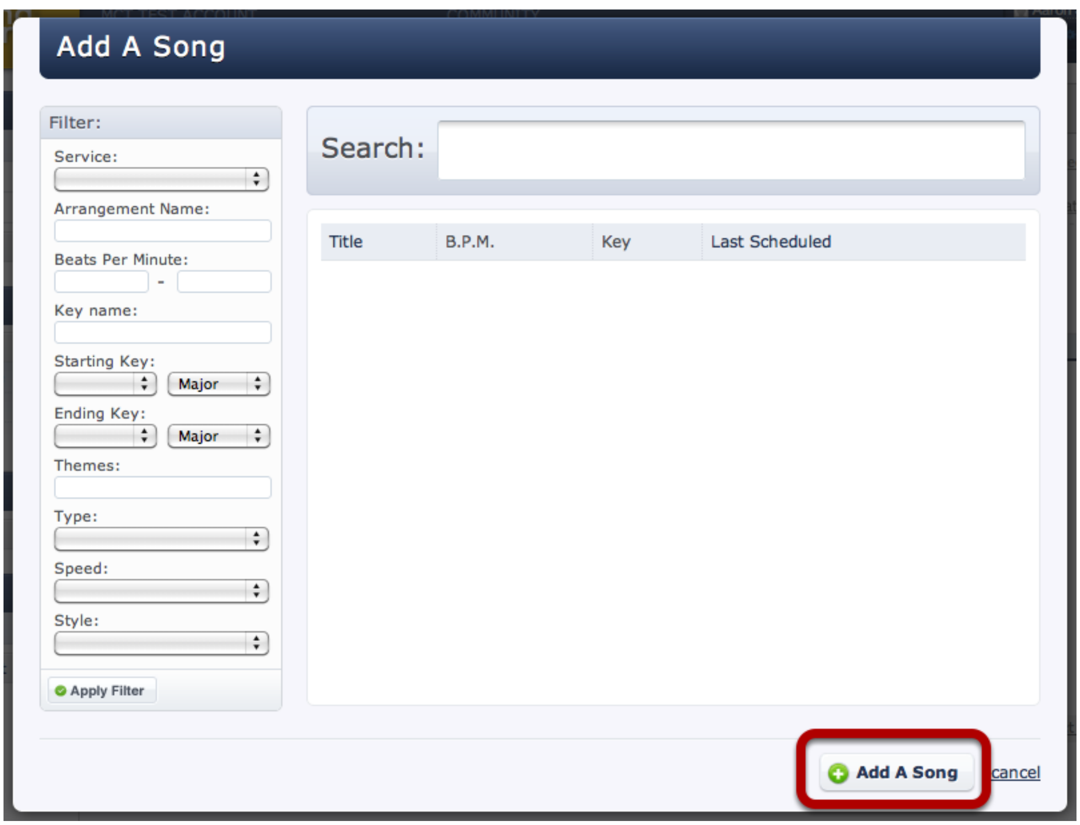


Enter the name of your header. I'm creating a "Worship Set" header to place above the first set of my worship songs. Click accept to add your header to the plan.

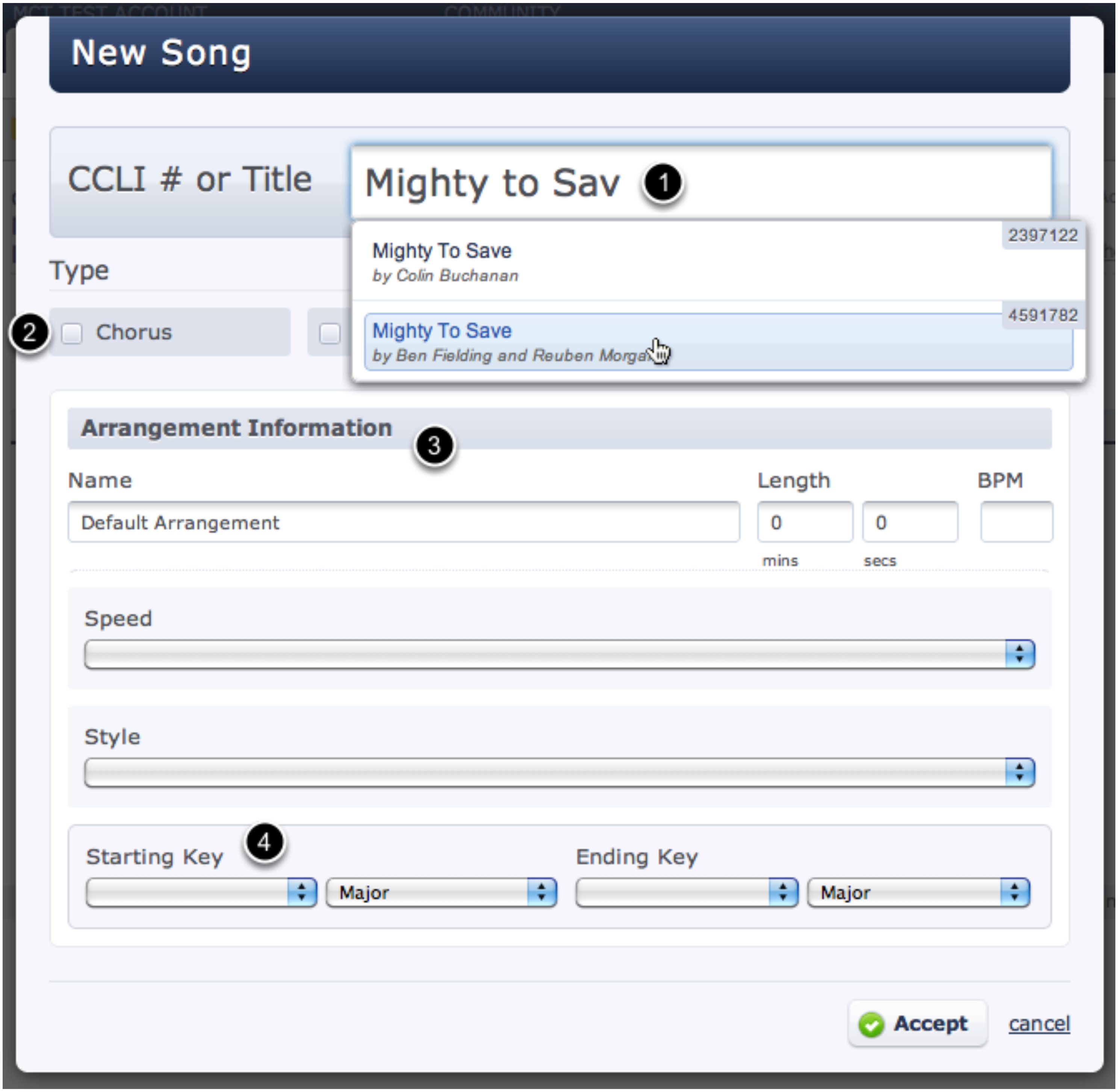
Add a Song

The "Worship Set" header has been added to our plan, so now let's add our first song. This time, instead of hovering over **add an item** and clicking **add a song,** let's use one of Planning Center's built-in shortcut keys. Type the letter s on your keboard to bring up the **Add A Song** box.

(If you hit the enter key instead of clicking accept in the previous step, you will have to click anywhere in the window before the shortcut key will work)



Since this is a brand new account, there are no songs in our database, so we'll need to add a new song before we can add it to our Plan. To do that, click the "Add a Song" button.



1. Type the name of your song and Planning Center looks it up on CCLI to import all the copyright information.
2. Each song can have **Custom Song Properties** to help you organize them better. Planning Center starts you off with the *Type* property with options for *Chorus, Hymn, Instrumental, & Special*.
3. Every song must have at least one arrangement. Be as descriptive as possible with your arrangment names. If your arrangement is by a certain artist, you can title your arrangment with the artist name, like *Hillsong United* or *Michael W. Smith*. If it is not based on an artist, you

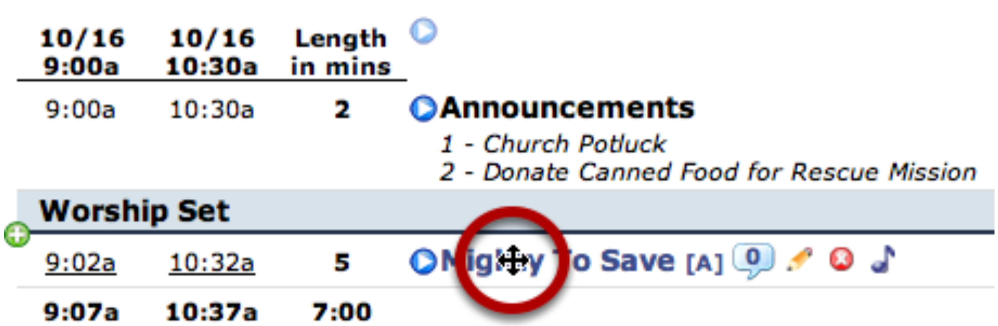
might title it by your band or ministry name, like *High School Version*. Each arrangement has its own Length, Beats Per Minute (BPM) and Custom Arrangement Properites, like Speed and Style.

4. If your arrangement starts and ends in the same key, just enter the starting key and leave the ending key blank. (In the future, you can add multiple Keys to each arrangement and then choose which key you want to use each time you use that song. You can attach different files to each key, or attach files to the arrangement (like lyrics) so that they are available for all keys.)

Once you've entered your song, arrangement & key information, click the Accept button to add that song to your plan.

Our song has been added to our plan. Planning Center color-codes songs in blue and media in green.
To edit details about any element you've added to your service, hover over it and click the pencil.

Drag & Drop to Reorder



To reorder elements in your plan, hover over the element title until you see this icon. Click and hold your mouse, then drag the element up or down to a new location and release the mouse.

View or Hide Times for each Element

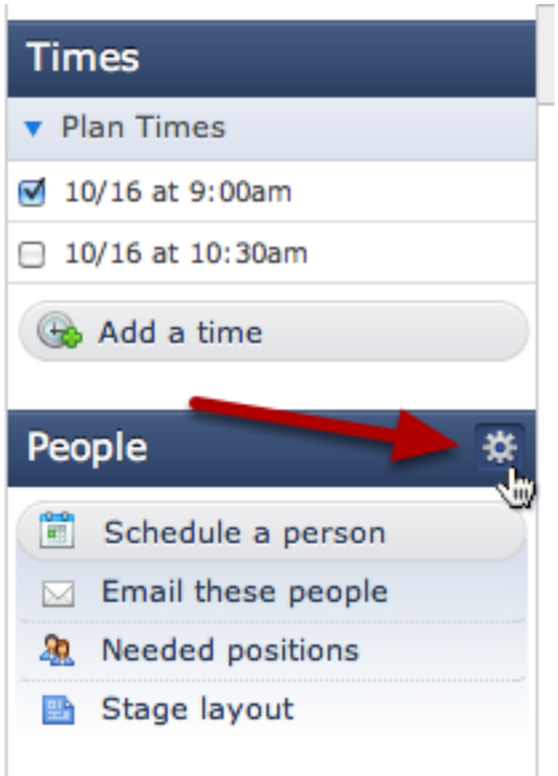
Planning Center has columns for each of your Plan Times so you can see what time each element is planned to occur. By using the checkmarks next to each Plan Time in your Times box, you can show or hide these time columns next to your elements. I have the 9:00am time checked, so there is a 9:00am time column for each element.

If you have elements that only occur at one of your plan times, see this lesson to learn how to exclude elements from specific plan times.

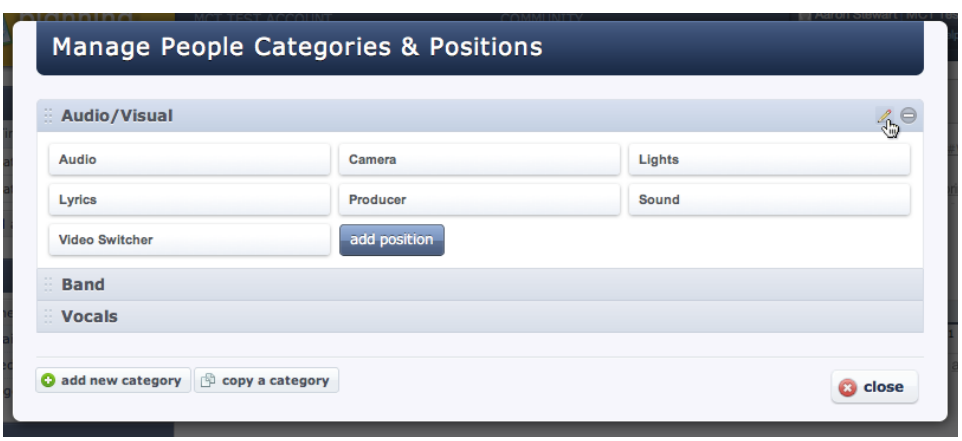
Adding People and Assigning Them to Positions

This lesson will show you how to add new people to your account and assign them to Positions for use in your plans.

Edit People Categories & Positions within your plan



Hover over the People section in your plan and click the gear that appears to setup the People Categories and Positions for this entire Service Type.



People **Categories** are often similar to Teams. In the above picture there are 3 categories: Audio/Visual, Band and Vocals. Click on any Category to see its Positions.

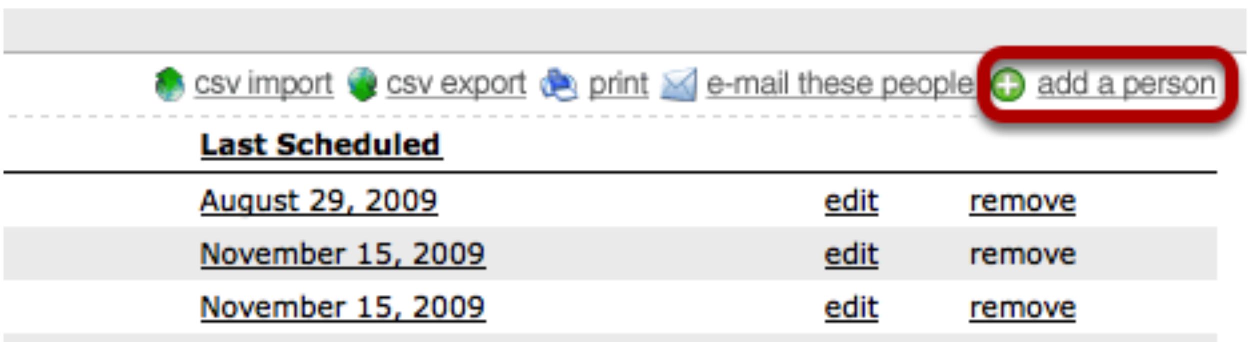
Categories are made up of **Positions** which are the specific jobs or roles that you will schedule your people for. The positions above include Audio, Camera, Lights, Lyrics, Producer, Sound & Video Switcher.

Feel free to add or edit any of the Categories or Positions here. For more information, read this article.

Add People to your People Database

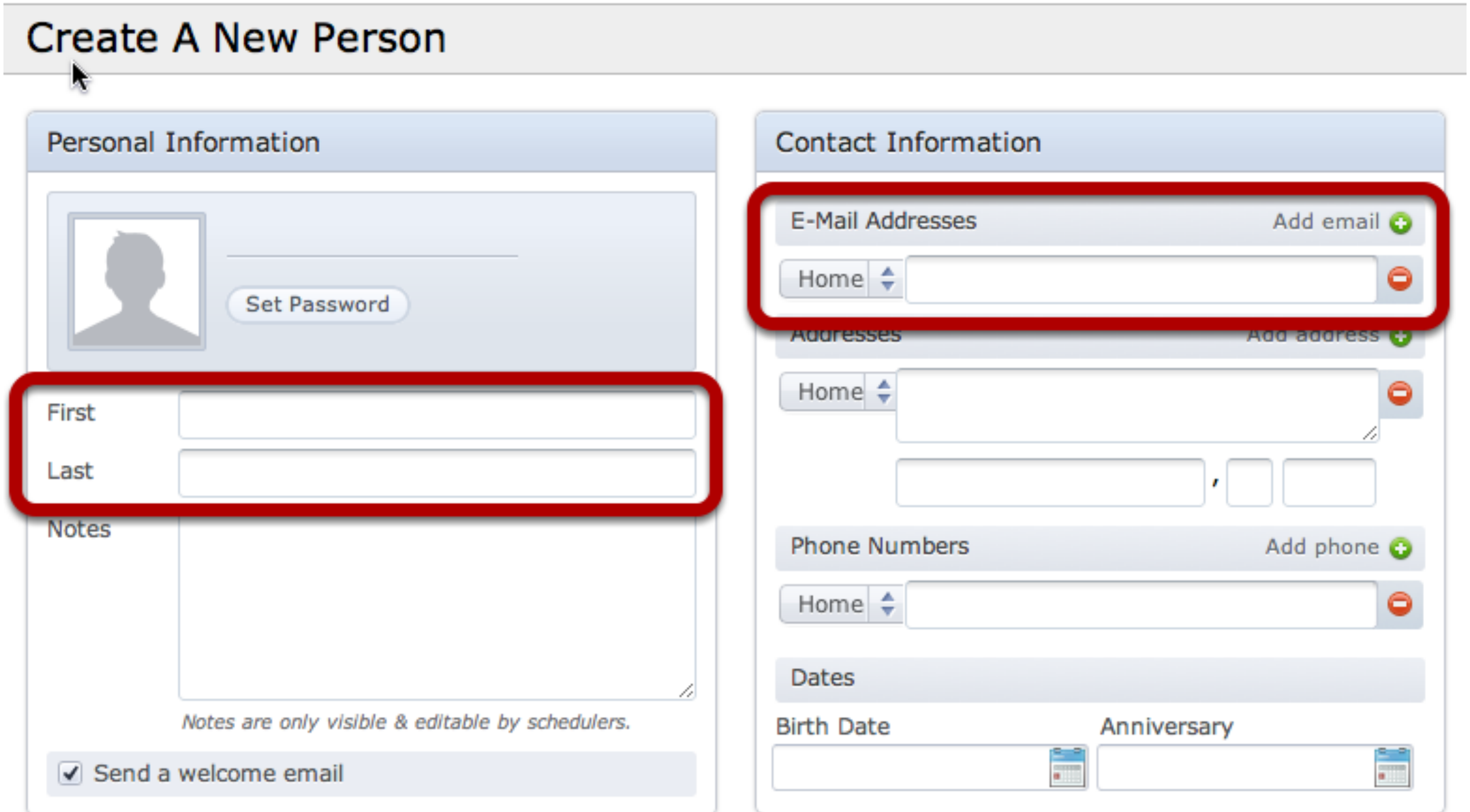
Click the People tab to go to the People database.

Click on add a person



To add one person at a time, click add a person and follow the following steps. If you have a CSV file with your people and would like to import it, see this article.

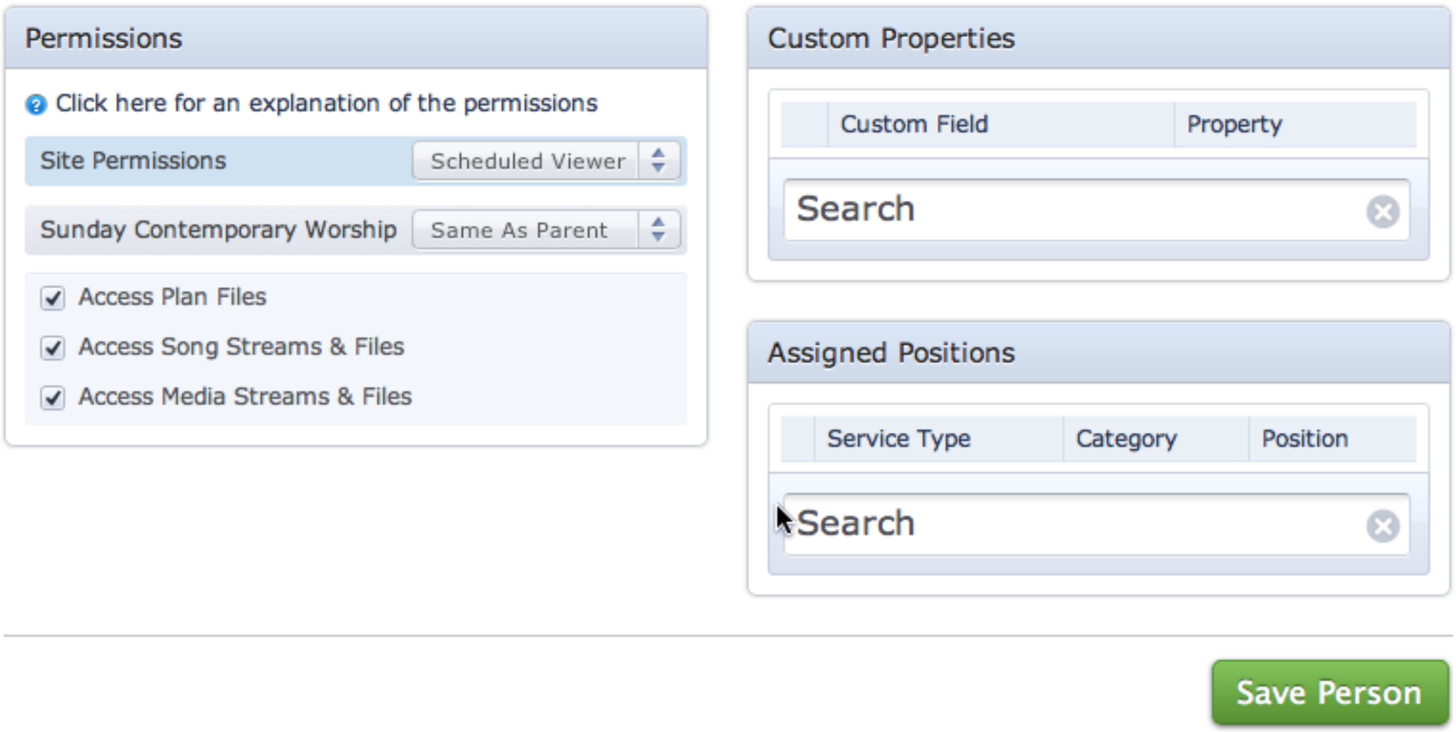
Enter at least first name, last name, and email address



You must at least have a first name, last name, and email address in order the person to be able to login.

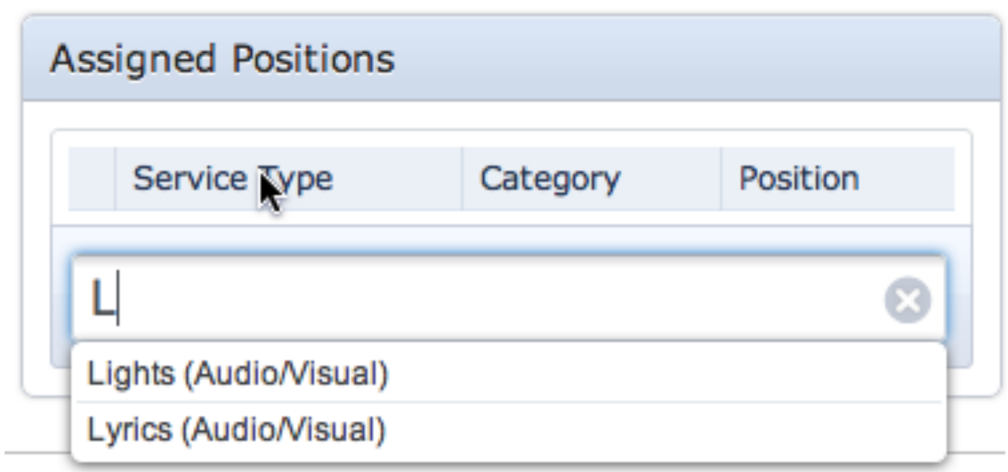
A password will automatically be assigned and sent to them in a welcome email, which also gives them instructions on updating their information, uploading a profile picture and setting up text messaging. In addition, there is a link to our Volunteer Video Tutorial which gives them all the basics of managing their schedule and account.

Check Permissions



The default permission level is called "Scheduled Viewer". Scheduled Viewers can only see plans they have been scheduled for and edit their own profile. For an explanation of permissions, click here.

Assign Them to Positions



Let's assign this new person to our lights position. In the Assigned Postions box, type "Lights" and then select it from the list.

When you are done, click Save Person.

Add any additional people you want to schedule to your people database.

How to Schedule Your People

There are many ways to schedule your people in Planning Center. This lesson is an overview that will briefly describe the different ways and give you links to learn about each one.

Schedule One Week at a Time from a Plan

- Scheduling A Person - Learn how to schedule people one at a time.
- Scheduling Groups or Teams - Learn how to schedule an entire group at one time. You can schedule the whole group to one position, like the Choir, or you can schedule each person to different Positions.
- Setting Up or Editing Needed Positions - Needed Positions allow you to schedule even before you know *who* you want to schedule. Tell Planning Center how many people you will need for each position, and when you are ready, it will give you a list of people to choose from.

Schedule Using Templates

- Creating A Template and Applying it to a Plan - You can create templates that already have your people or needed positions in them. When you create new plans you can choose the template that has the people you want. You can even add the people from a template to an existing plan.

Schedule Many Weeks at a Time using the Matrix

- Using The Matrix To Schedule - The Matrix shows you many plans side by side. Learn how to use the Matrix to schedule weeks or months at a time.
- Auto-scheduling in the Matrix - If you have setup your needed positions, you can have Planning Center automatically complete your schedule, avoiding any conflicts or block-out dates.

How to Use Songs, Arrangements & Keys

This lesson is an overview of using Songs, Arrangements & Keys with links to other lessons that show you how to accomplish each task.

How are Songs, Arrangements & Keys related?

Songs can have multiple arrangments and each arrangement can have many keys. When you add a song to a plan in one key, only the files from that key, arrangement and song will be available from the plan so that your users always have the correct files.

Adding & Editing Songs, Arrangement & Keys

- Adding a New Song - Song information is imported from CCLI
- Adding Arrangements to a Song - Add different arrangements for each version of the song you use. Title your arrangements by the original artist or album (Chris Tomlin - Arriving), by ministry (Student Arrangement) or any way that will help you differentiate between them (Condensed Version).
- Adding Keys to Song Arrangements - Add multiple keys and use Planning Center's transposing features. You can even title your Keys to help you know what you use each key for (Female Key, Original Key).

Organizing & Finding Your Songs

- Using Custom Song Properties - Create custom properties and then assign them to your songs or arrangements to help you find songs quickly.
- Searching & Filtering for Songs - Learn how to search for songs using Custom Properties, Themes, Titles, Keys and Lyrics.

Transposing Chords & Mp3s

- Lyrics & Chords - Enter lyrics & chords or copy and paste them, and Planning Center will automatically make PDFs in any key you add to your arrangement.
- Transposing MP3s - Upload mp3 files and have Planning Center transpose them to any key you add to your arrangement.

Attaching Files

- Add Song Attachments - Upload files from your computer, link to files on the internet, or link to iTunes or AmazonMP3. Files will be available to your users when you add them to your plans.
- Streaming or Downloading MP3s - Choose to enable mp3 downloading or restrict it so that they can only be streamed online.
- Attachment Types - Using this advanced feature, you can classify each file you attach so that

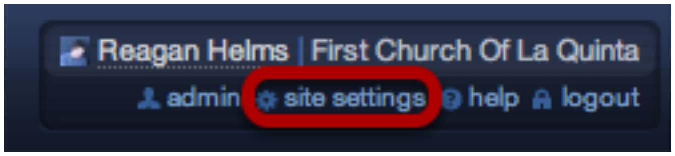
different users see different files. For example, set it up so that only Band members can see chord charts, Vocalists can see lyrics, or different members of your orchestra only see the sheet music for their instrument.

Account Administration

Canceling Your Account

If you are the Site Administrator of your account and have decided that Planning Center isn't right for your teams at this time, you can follow these instructions to cancel your account. (If you are a member of your church's account and want to be removed from all future scheduling emails, you can remove your email address from your Profile.)

Go to Site Settings



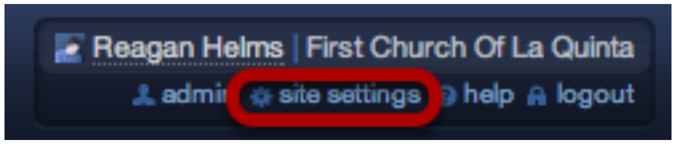
Click 'Cancel This Account'

Sorry to see you go! Once you click this button, you will automatically be logged out. Effective immediately, no one will have access to the site or any files on the site you may have posted, and you will receive a cancelation email notification. Your credit card (if there was one on file) will no longer be charged.

Changing A Payment Method

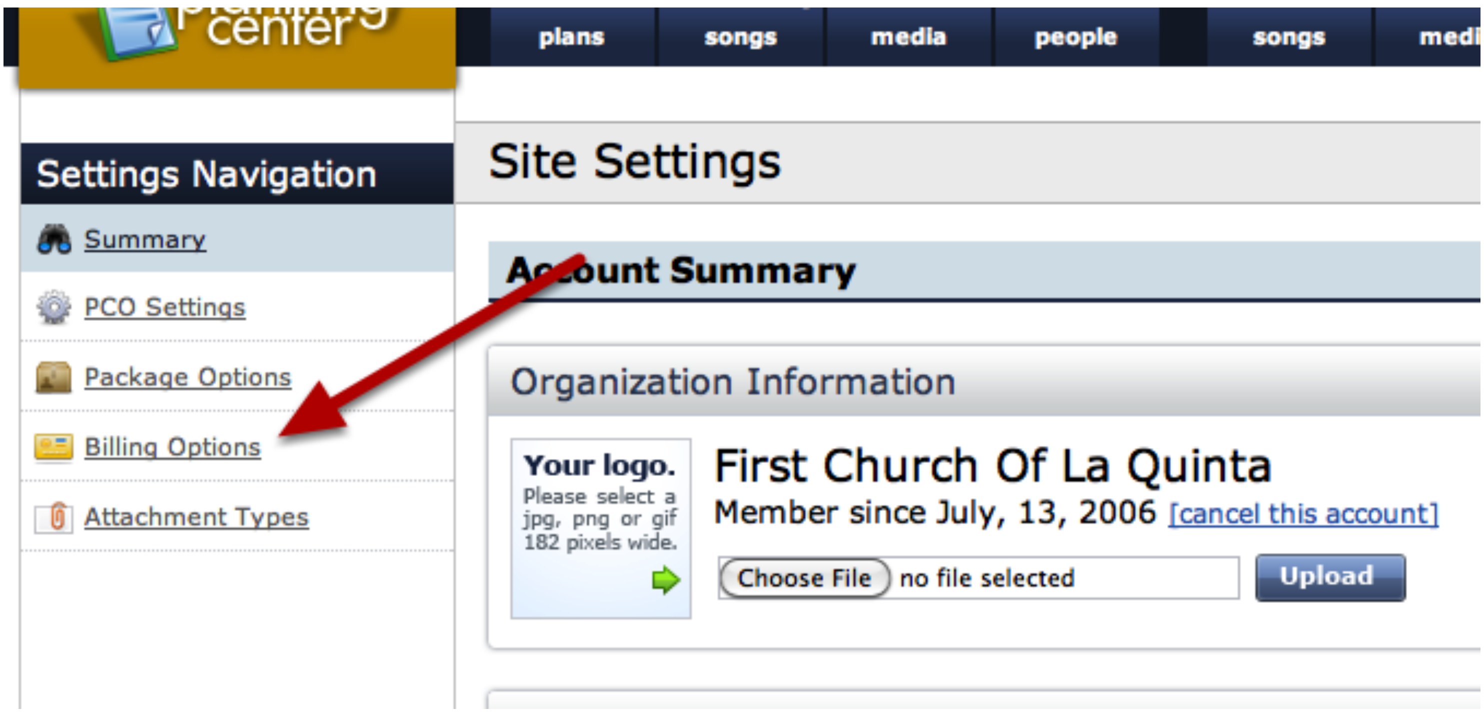
These steps show you how to change your method of payment. This lesson will also be helpful if a credit card could not be charged and you need to re-run it.

Click on 'site settings' in the upper right corner.



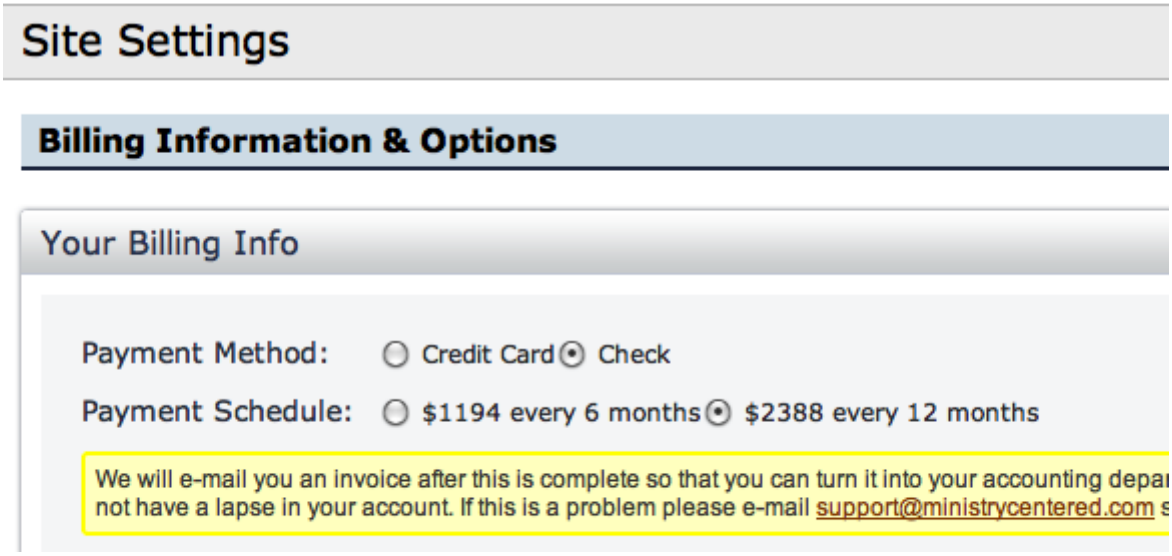
Note: Only Primary and Secondary Account Administrators will have access to the 'site settings' page.

Click on Billing Options



This is what you'll need to click on if you need us to run the credit card again. Just click here, then re-enter the card number.

Choosing to pay by check:



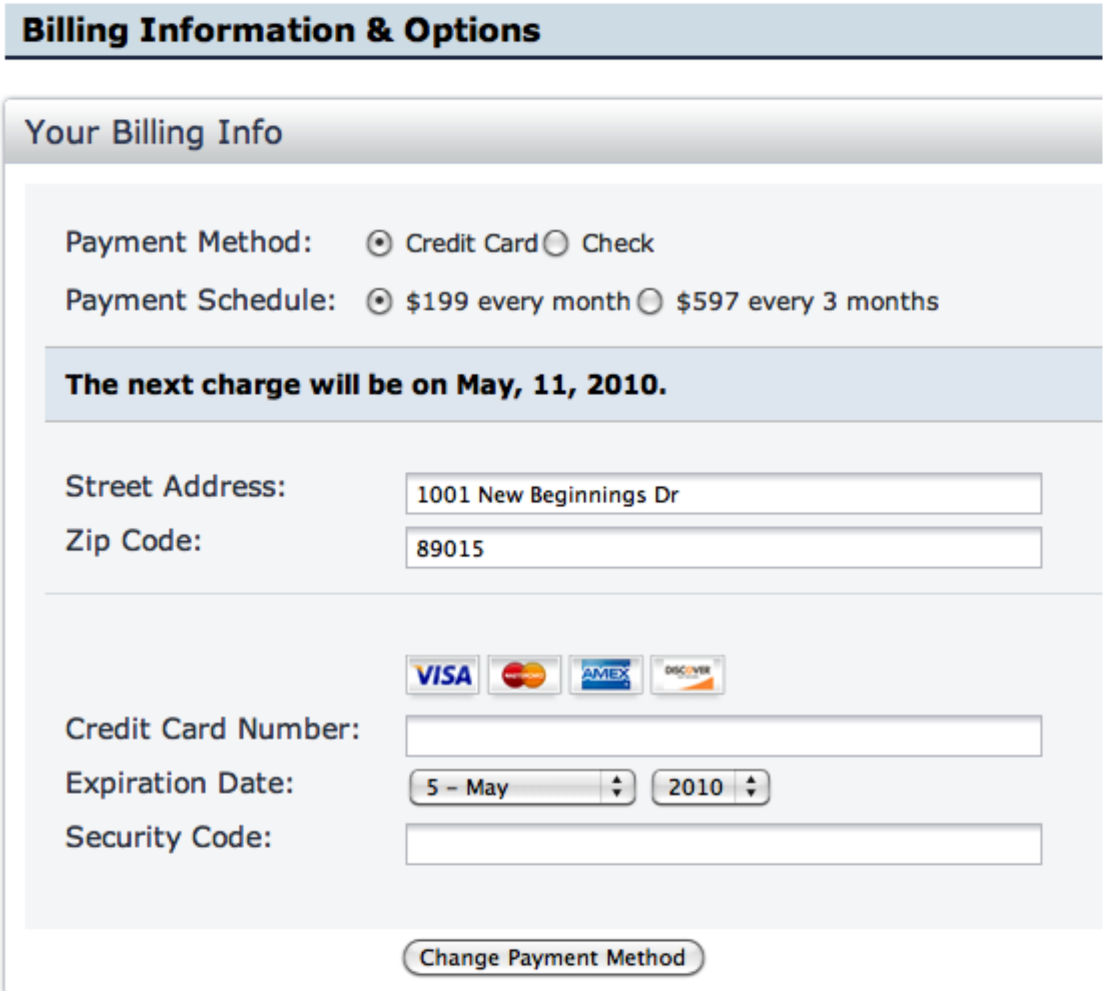
If you choose to pay by check, you may select to either pay for 6 months of service at a time, or 12 months at a time. Billing information is as follows:

Make checks payable to:

Ministry Centered Technologies
78-100 Main St. Suite 201
La Quinta, CA 92253

To help us find your account, or credit the correct account please include your Planning Center Organization ID # in the memo field.
This is found at the bottom of every Planning Center page in light gray.

Choosing to pay by credit card:



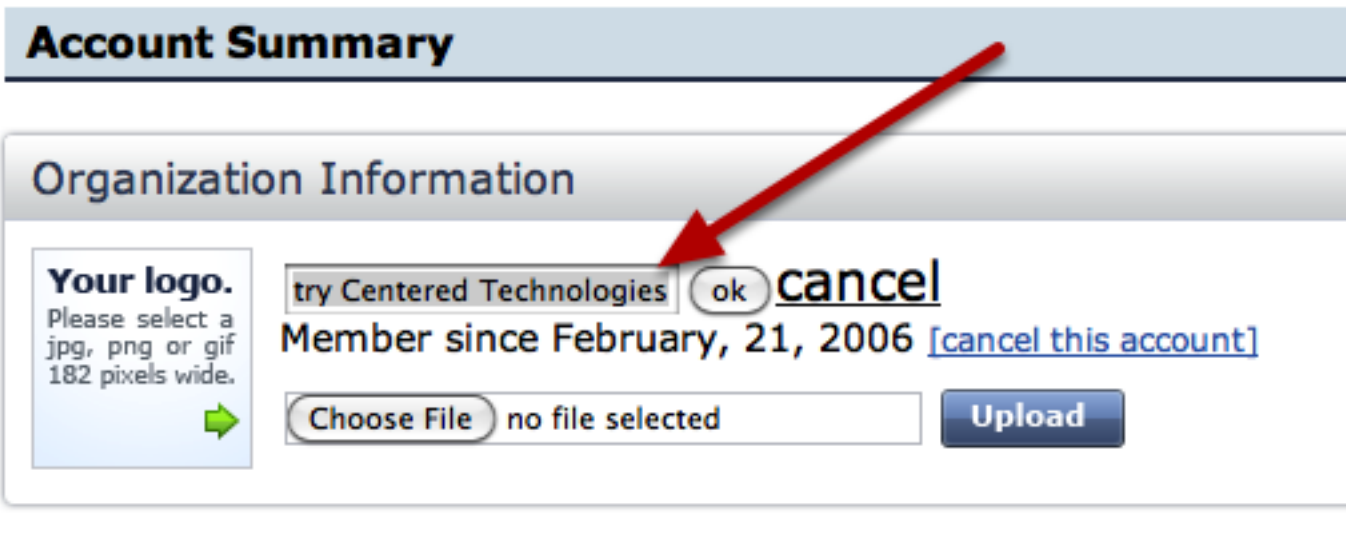
If you choose to pay by credit card, you may select to either pay for 1 month of service at a time, or 3 months at a time. If you choose to pay by credit card, we will need your address, card number, expiration date, and security code (although it's not necessary to add the security code).

Changing The Name of Your Account

Click 'site settings' in the upper right corner.

Note: only Primary and Secondary Account Administrators will have access to the 'site settings' page.

Click on the current name of your account to edit it.



When you first see your church name, it will appear just like the date "February 21, 2006" looks in this picture. Click on it and you will be able to edit the name. Just click OK when you are finished.

Declined Payments or Delayed Checks

This lesson shows you how to handle a payment that failed. Whether it's a check that hasn't arrived in the mail yet, or a credit card that was declined, this will show you how to go about fixing that problem.

Checks: Payment Failure Notices

When you receive a payment failure notice about a check not coming in the mail, there are a few options you have, and they depend on what you've done so far:

If you've already sent the check...

1. Wait it out another day or two to see if it arrives in the mail. Your account is safe for at least 3 or 4 days before anything gets shut down (we NEVER cancel someone's account. The worst that would happen is it would get an "expired" banner and you would not be able to use it until a payment came through).
2. Contact us to let us know that the check is in the mail. We'll keep an eye out for it.

If you haven't sent the check...

1. Go into Site Settings and change your payment method to credit card. If it is the day the payment is due and a check hasn't come, it will probably be at least a few days, even a week until it arrives to us in the mail. Sometimes it's best to try to cut the check for the next month and just pay by credit card this time.
2. Let us know that you haven't sent it yet and what your arrangements are.

Credit Cards: Payment Failure Notices

All credit cards on file are automatically charged on the date the payment is due. If the charge is declined, it means the credit card company/bank declined it. Often, if you rerun the card, it will go through right away. If the card declines more than once, we recommend you speak with someone from your credit card company.

Rerunning a Credit Card

Please note that we CANNOT rerun a card for you. It has to be done manually by you. Here is the process to rerun a credit card:

1. Log in, go to Site Settings
2. Click on Billing Options on the left sidebar.
3. Enter the card number and expiration date again
4. Click on Change Payment Method, and the card will automatically and immediately run again.

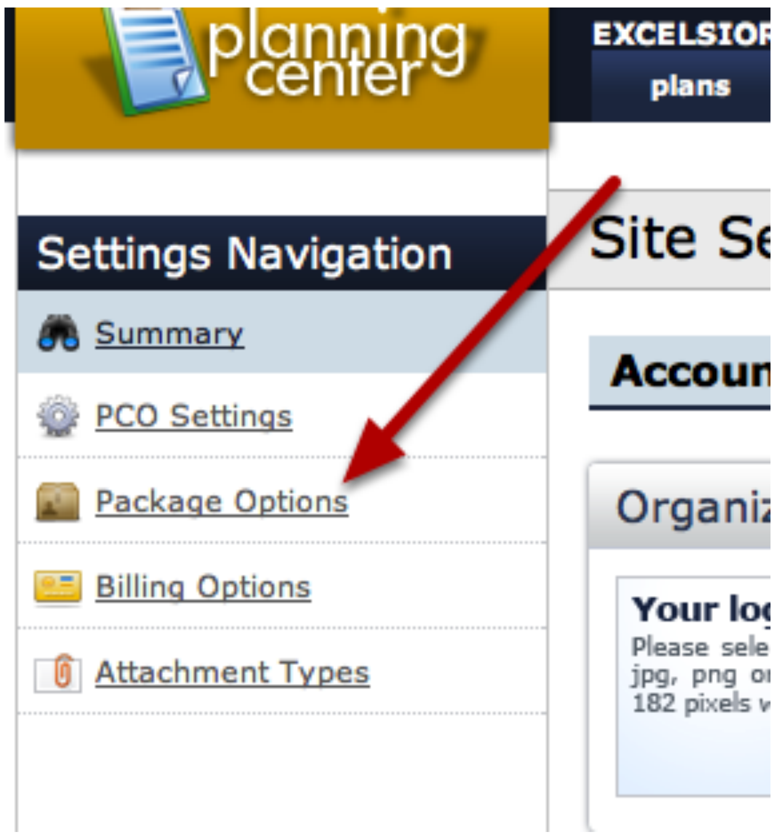
Enabling Extra File Storage

This lesson shows you how to take advantage of our Extra File Storage feature.

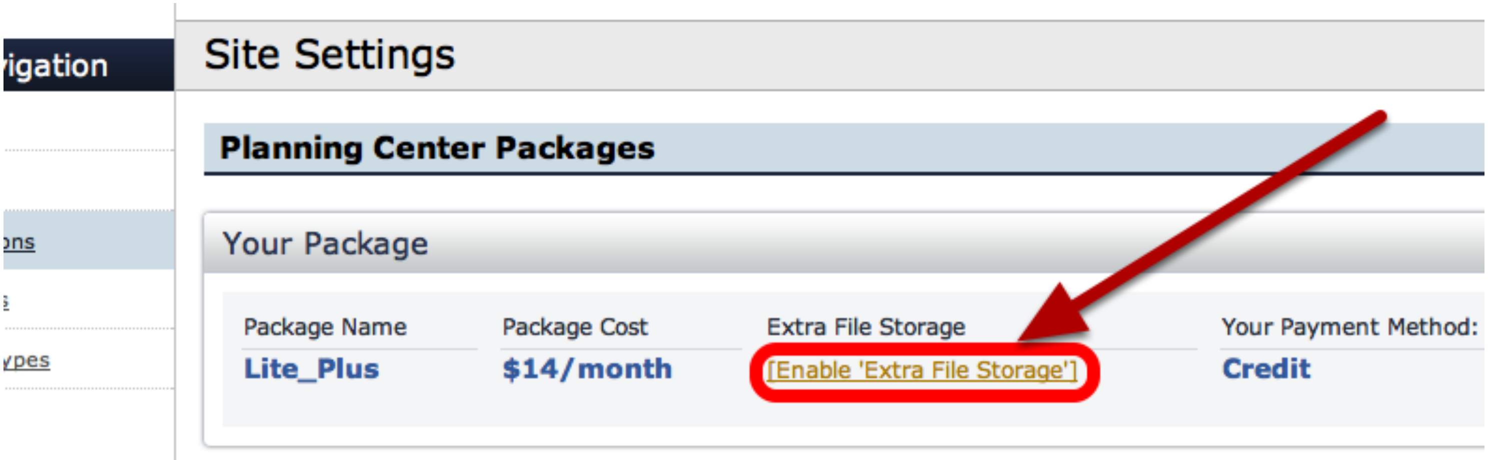
Click 'site settings' in the upper right corner

Note: only Primary and Secondary Site Administrators will have access to the 'site settings' page.

Click on 'Package Options' on the left.



then click on the gold 'Enable Extra File Storage' link



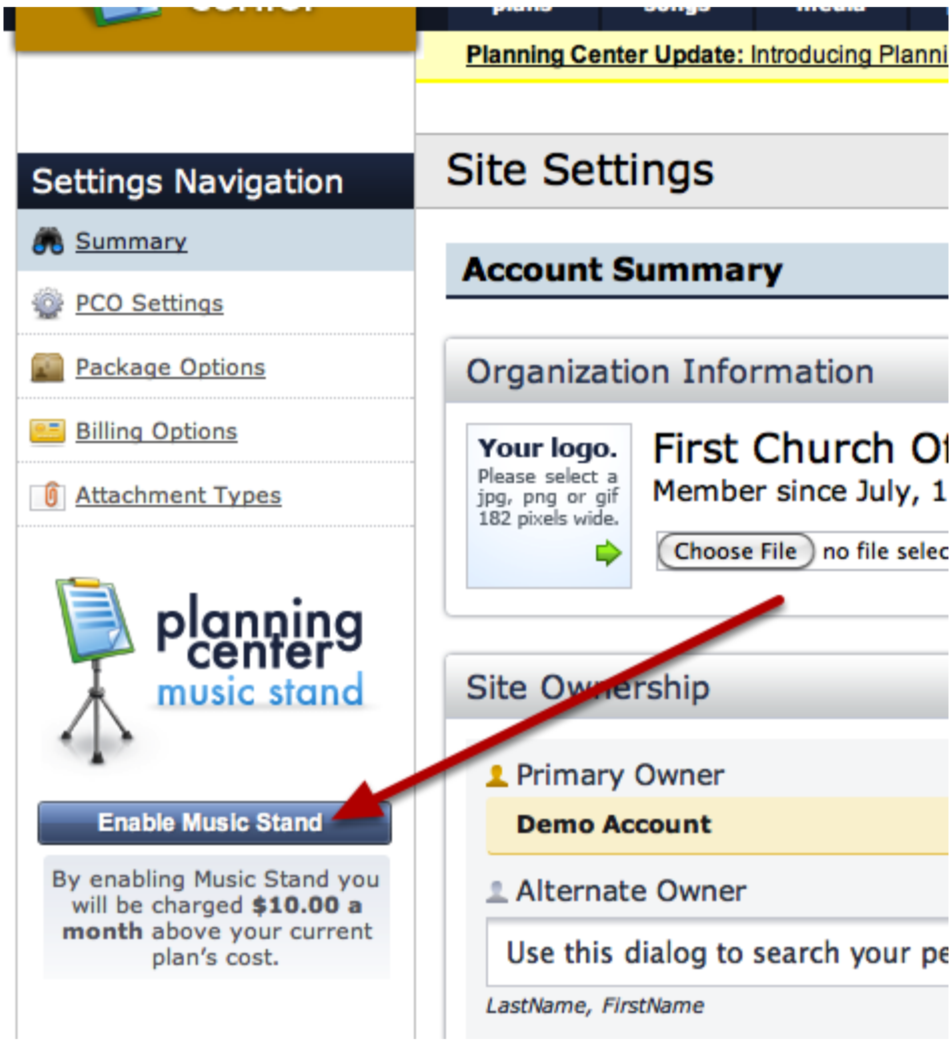
You can enable extra file space and just pay a pro-rated amount depending on how much you use. For every extra GB of storage you use, you'll be charged $5. If you only use half a GB, you'll be charged $2.50 and if you only use a quarter of a GB, you'll be charged $1.25, etc.

Enabling/Disabling Music Stand

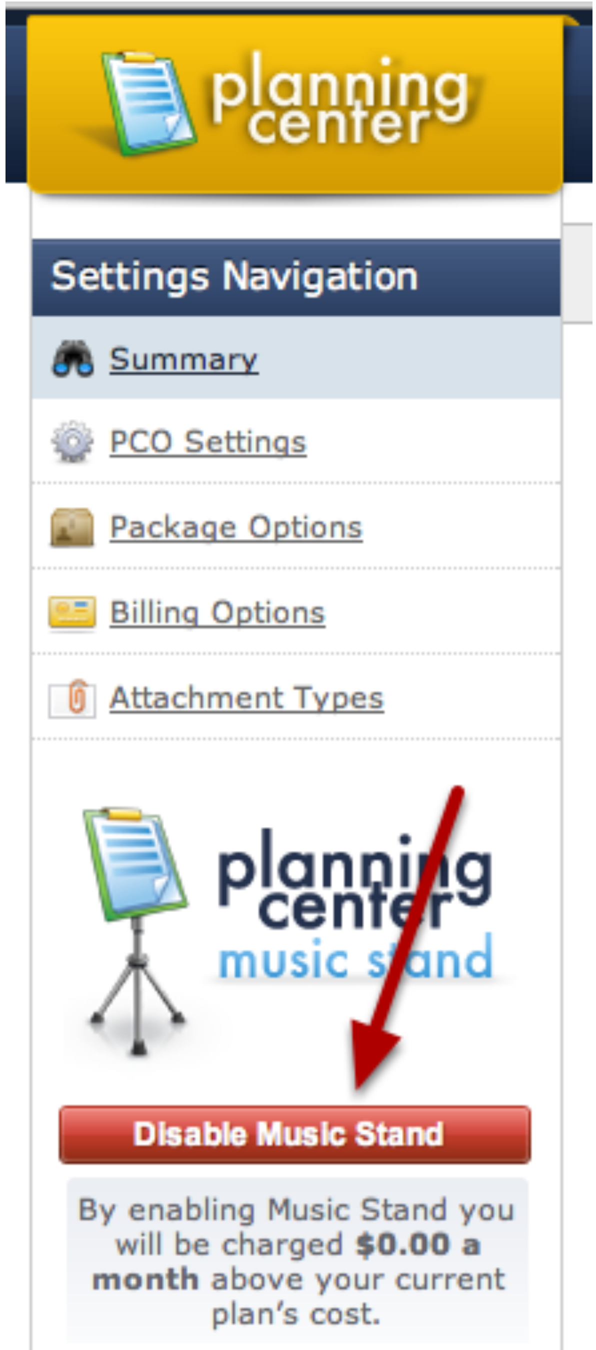
Click 'site settings' in the upper right corner.

Note: only Primary and Secondary Site Administrators will have access to the 'site settings' page.

Click 'Enable Music Stand' on the left sidebar.

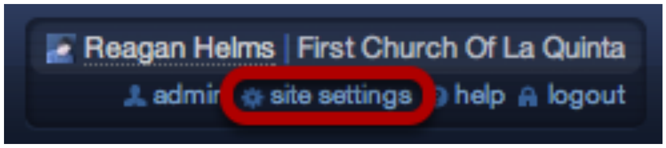


To Disable Music Stand, click on the button again.



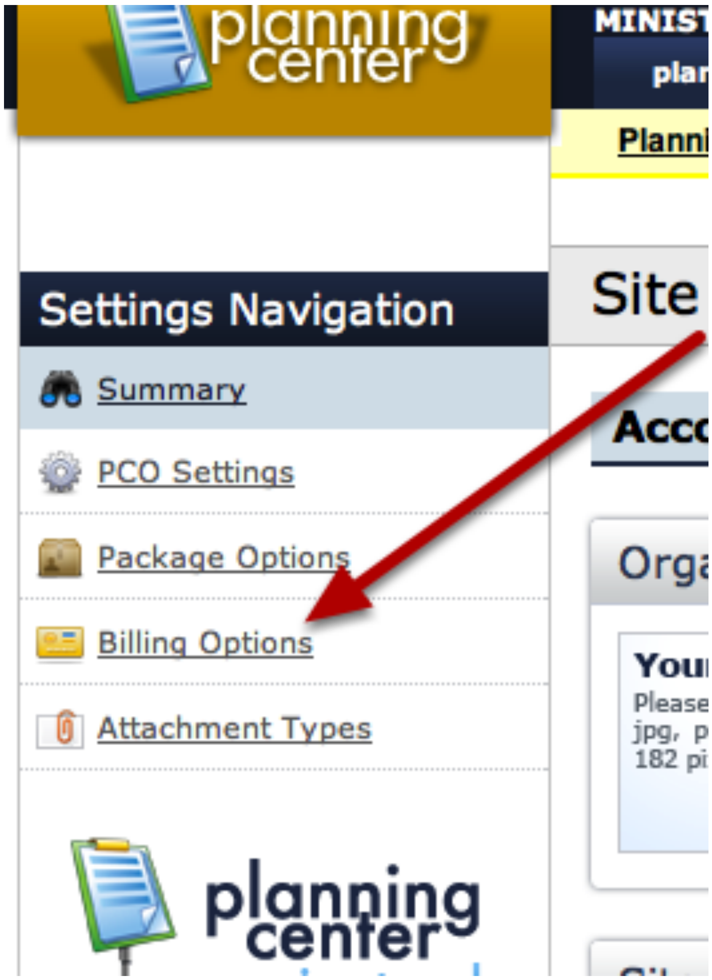
Printing Receipts and Viewing Previous Payments

Click on 'site settings' in the upper right corner



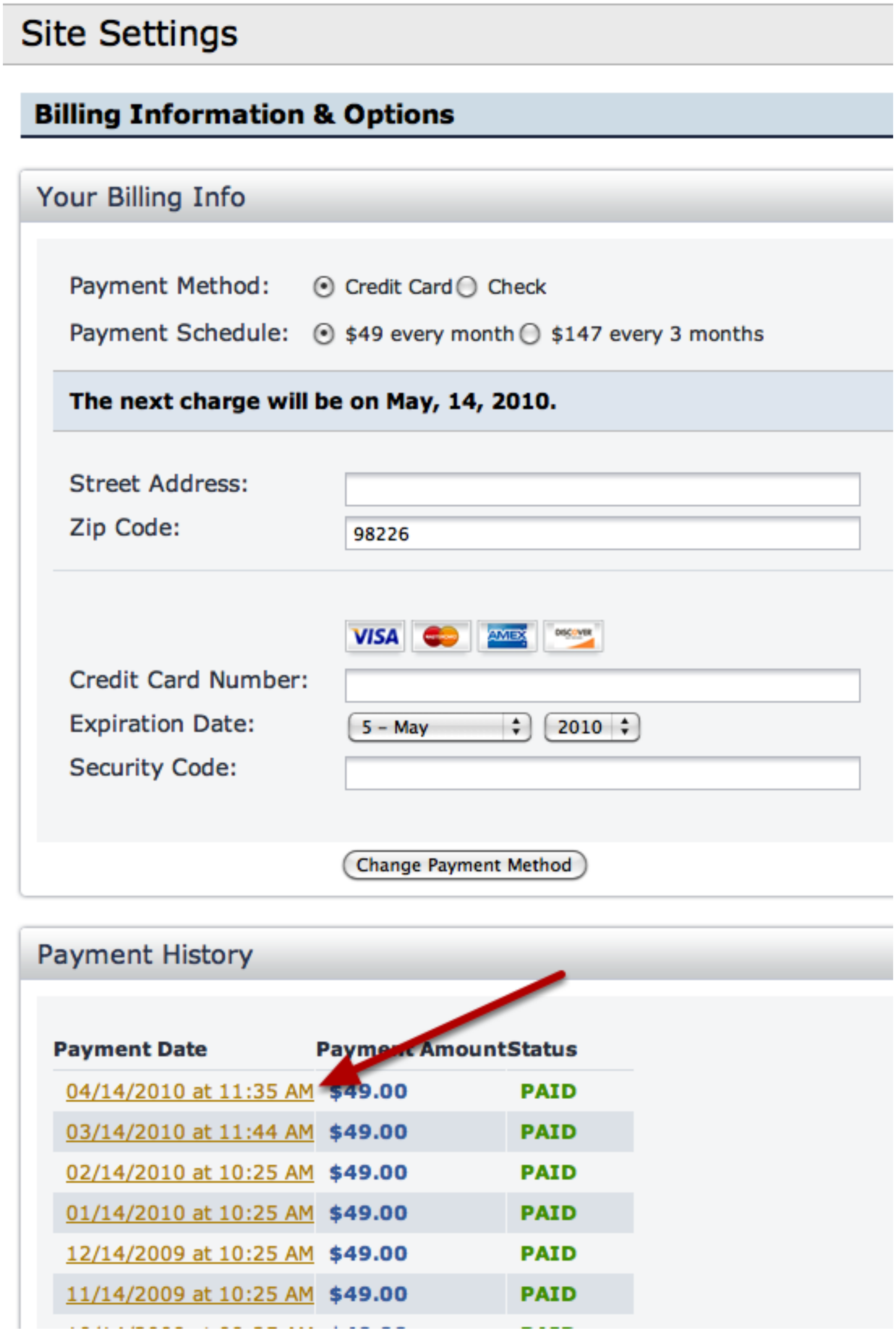
Note: the

Then click on 'Billing Options' on the left



If you'd like to see if a card was declined, or what previous payments have gone through, click on Billing Options to see that information.

Printing Receipts

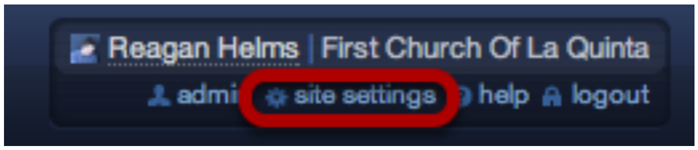


If for any reason you did not receive a receipt or just need to print one again, click on the date of the transaction and you will get a page that you can print off as a receipt.

Changing the Primary Account Admin & Adding an Secondary Account Admin for Billing

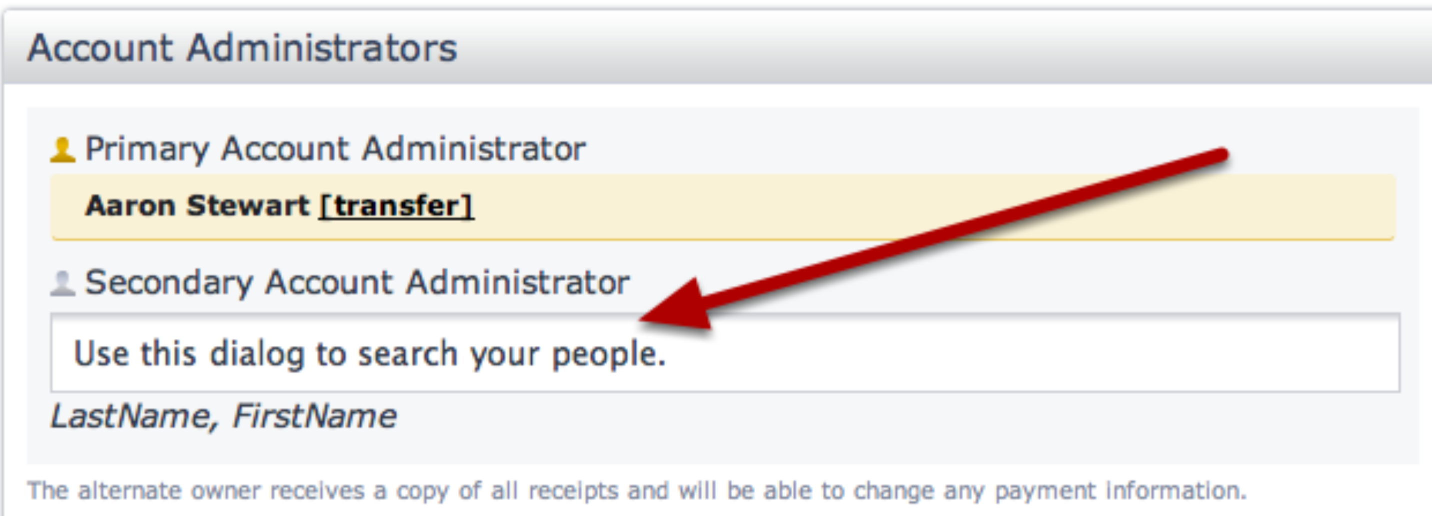
Learn how to add a Secondary Account Administrator who has the same rights as the Primary Account Administrator. This person can be set as a user in your finance department so they receive your billing invoices. Also learn how to request a change to Account Admins.

Click on 'site settings' in the upper right corner



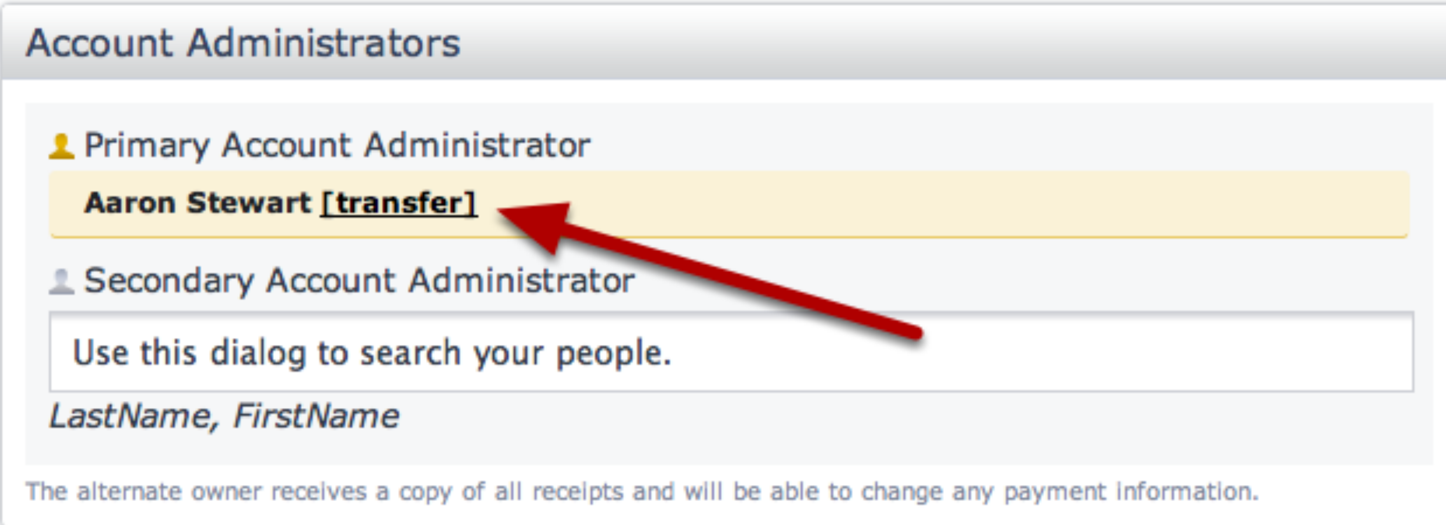
Note: only Primary and Secondary Site Administrators will have access to the 'site settings' page.

To Add a Secondary Account Admin:



Click in the search box and begin typing the person's name that you want to be the Secondary Account Administrator. A list will come up. Select the person. The Secondary Account Admin, as stated above, will receive a copy of all receipts and can change any settings on this Site Settings page.

Changing A Primary Account Admin



To change Primary Account Administration, the current Primary or Secondary Account Admins can click the transfer link and choose a new Admin. The new Admin will be given full administrative permissions.

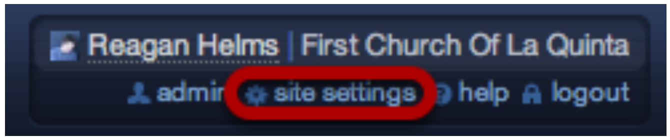
If your current Primary or Secondary Account Administrators are no longer at your church and you can't login as them, you must email support to change the Administration of the account. We will need an email from another pastor with an official church email address stating that the current Admin is not on staff anymore, and who the new Admin should be. Click the help button at the top right of Planning Center to send us an email.

Receipts/Invoices

Both the Primary and Secondary Account Administrators will receive automatic invoices and receipts. There is not a way to have anyone else in the system receive those automatically. We usually recommend that the Secondary Admin is someone in charge of finances for the church, and the Primary Admin is someone who is more of an administrator over the Planning Center account itself.

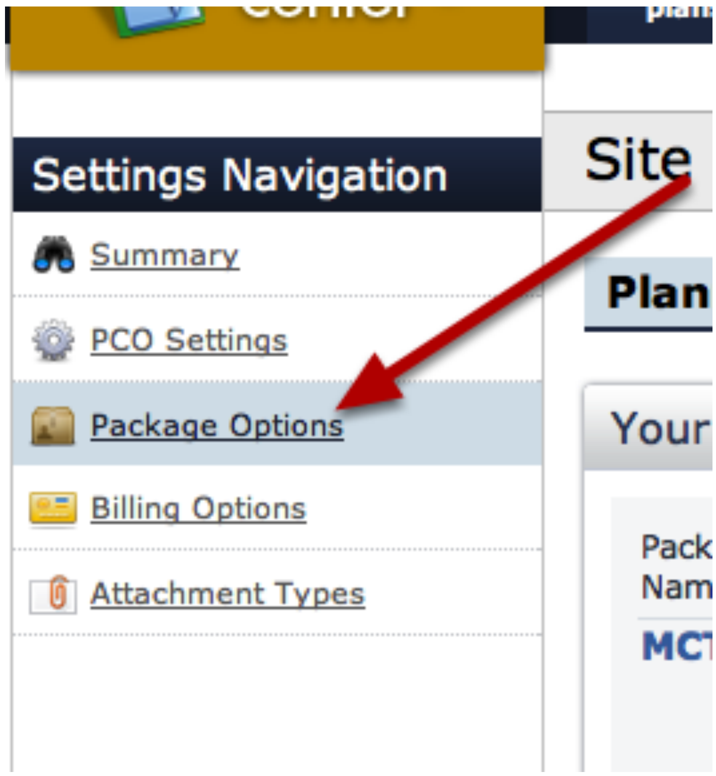
Upgrading/Downgrading Your Account

Click on 'site settings' in the upper right corner



Note: only Primary and Secondary Account Administrators will have access to the 'site settings' page.

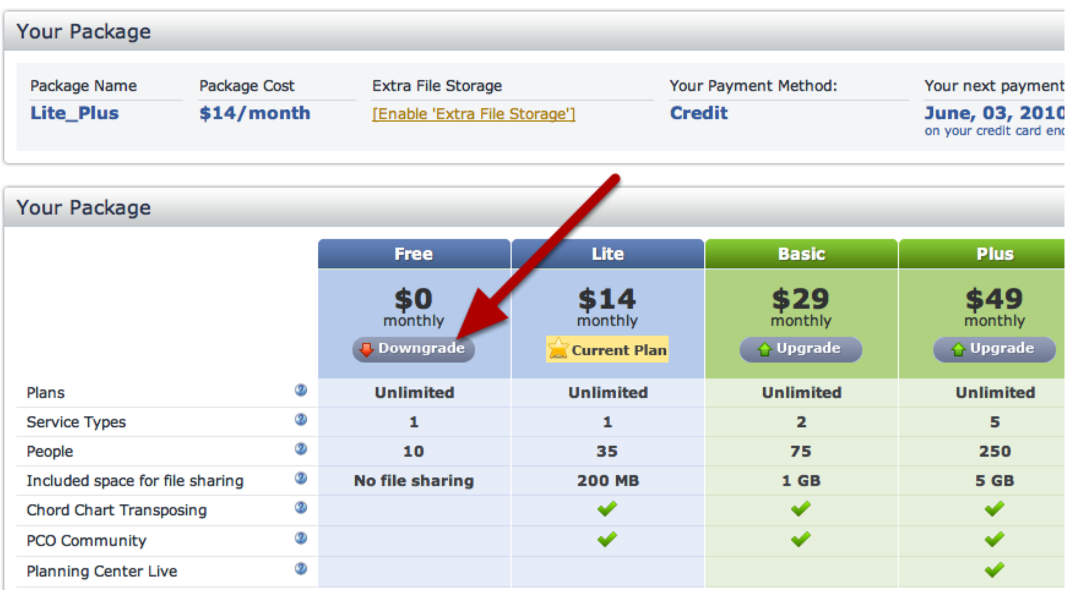
Click Package Options on the left sidebar.



Choose which plan you'd like to upgrade to, then click 'Upgrade' to upgrade your account.

Once you upgrade, your next payment will reflect the upgraded price.

Click 'Downgrade' to downgrade your account.

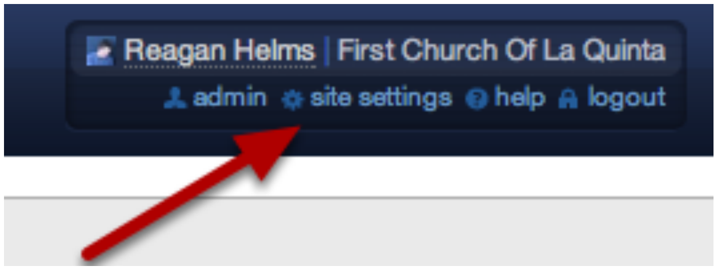


Once you downgrade, your next payment will reflect the downgraded price. If the downgrade button is not red, like above, but rather is grey, that means you will need to look to the far left under Usage and make sure you fit within the requirements of the plan you wish to downgrade to. Most often you will have to delete a service or some people, or maybe even some file space.

Allowing Administrators to Delete

This lesson will show you how to allow Administrators to Delete any item in your account, even if they didn't add it.

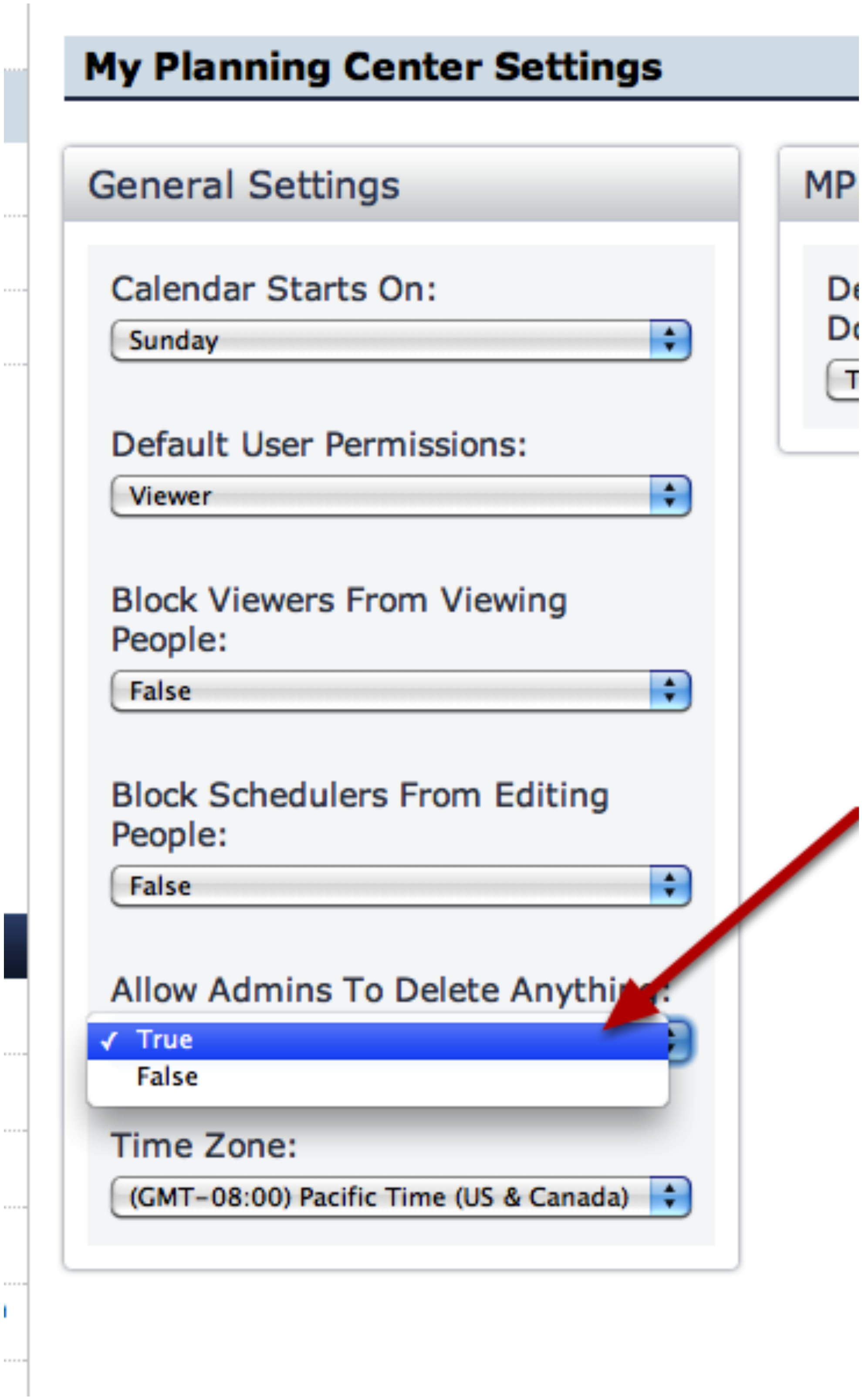
Click on 'site settings' in the upper right corner



Note: only Primary and Secondary Account Administrators will be able to access the 'site settings' page

Then click on 'PCO Settings' on the left

Then change 'Allow Admins To Delete Anything' to 'True'.

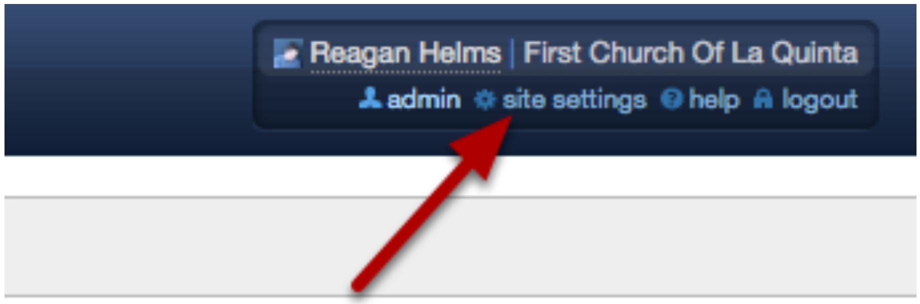


Your Administrators will now be able to delete anything from your account.

Changing Your Country

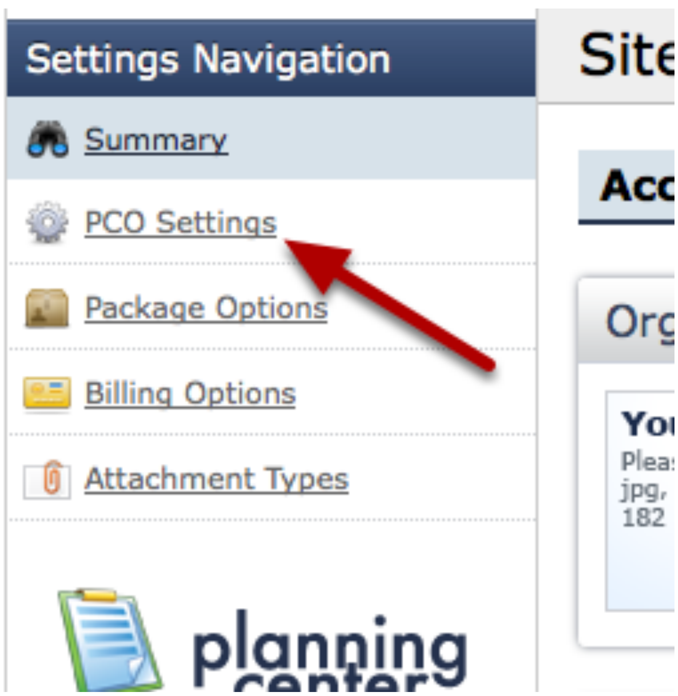
Note: You will need to be the Primary or Secondary Account Administrator in order to have access to the site settings

Click on 'site settings' in the upper right corner

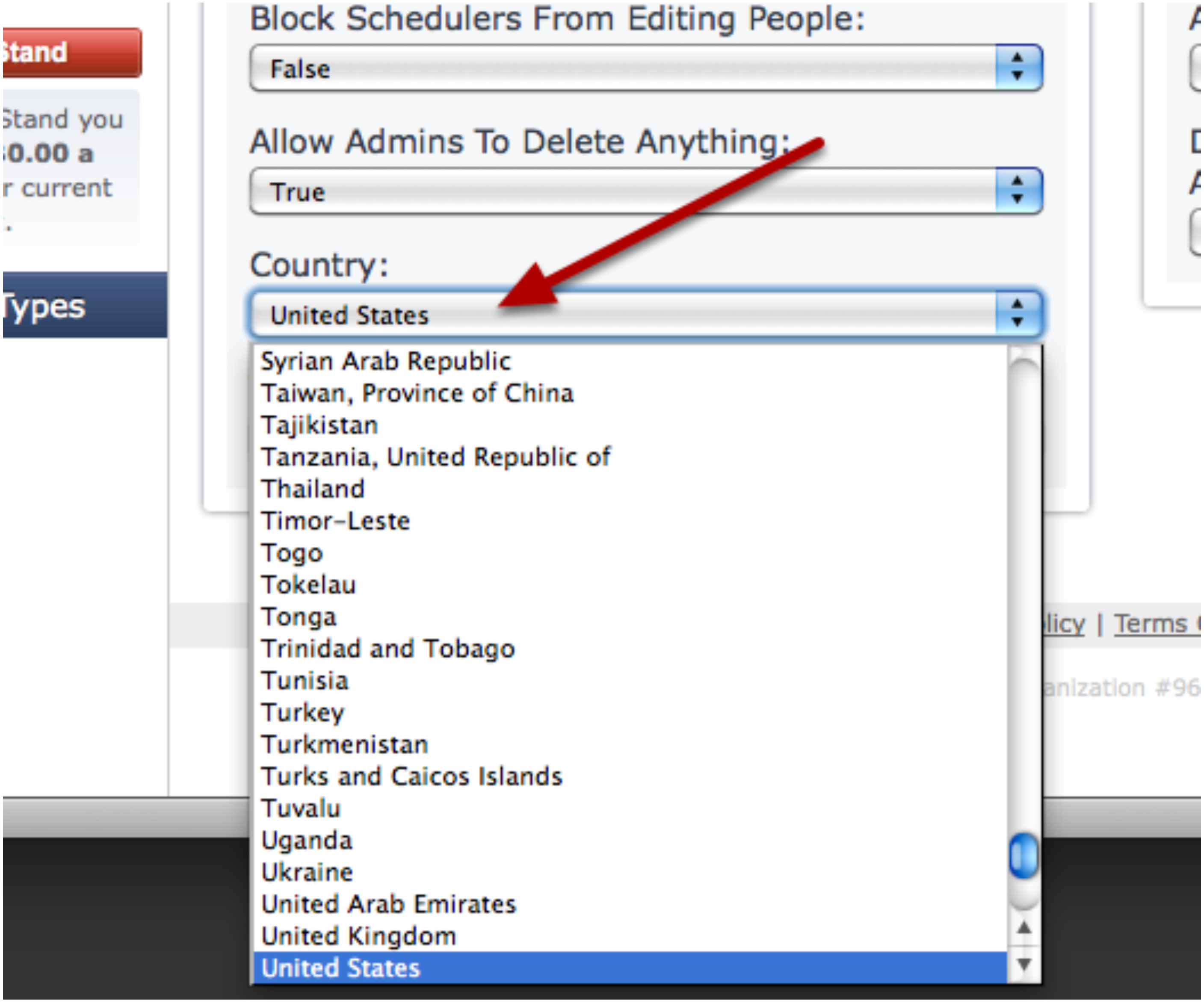


Note: only Primary and Secondary Account Administrators will be able to access the 'site settings' page

Click on 'PCO Settings' on the left



Select your country from the dropdown menu

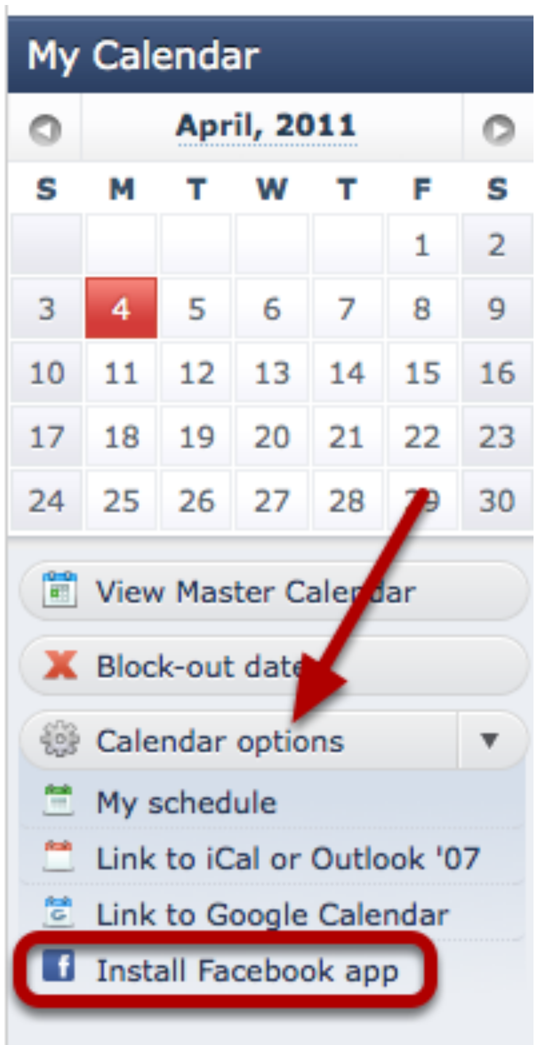


Apps

How To Install and use the Facebook App

This lesson shows you how to install the PCO Facebook App. The Facebook App will allow you to respond to requests from Planning Center on your own Facebook page. It will show you a notification when you have been sent a request and will then have a link to accept or decline.

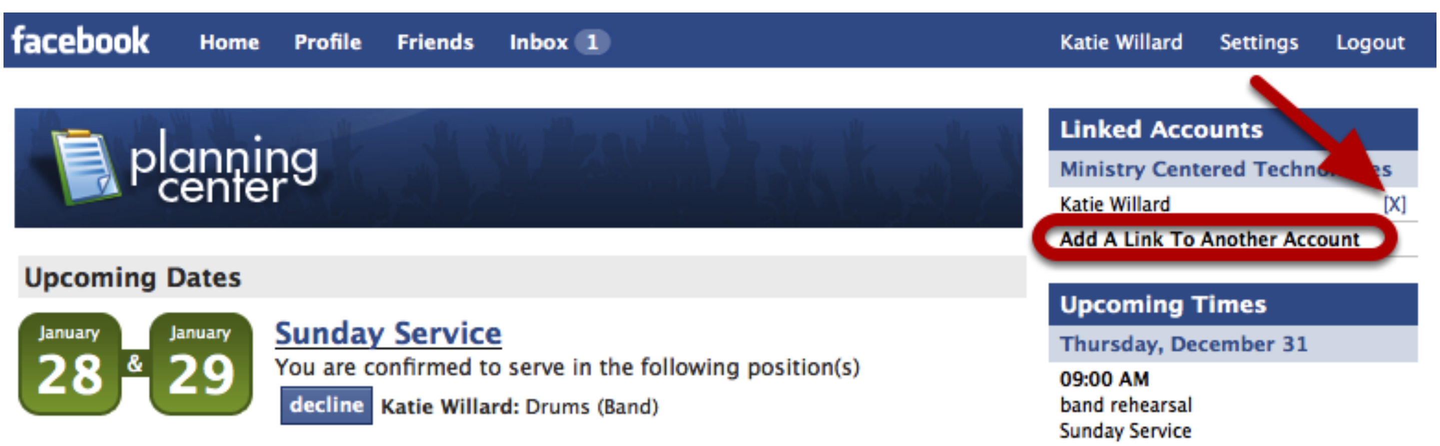
Click on the 'Calendar options' button to expand it, and then on the 'Install Facebook app' link.



Enter your email address and password.

This will be the user name and password for the Planning Center account that you want linked.

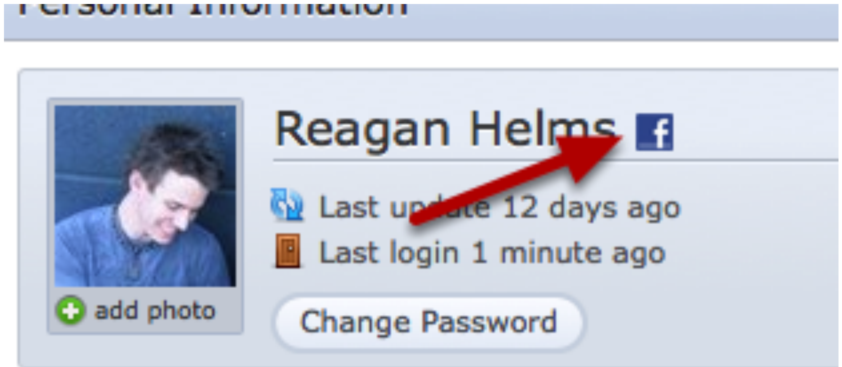
Facebook App automatically installed.



This will show you all the dates you have accepted or have pending, plus all the times you are scheduled for. You can also accept and decline from within Facebook.

To add another account, click the link to do so. To delete an account you currently have installed, click the "x" next to it.

On Profile page, Facebook icon will appear.

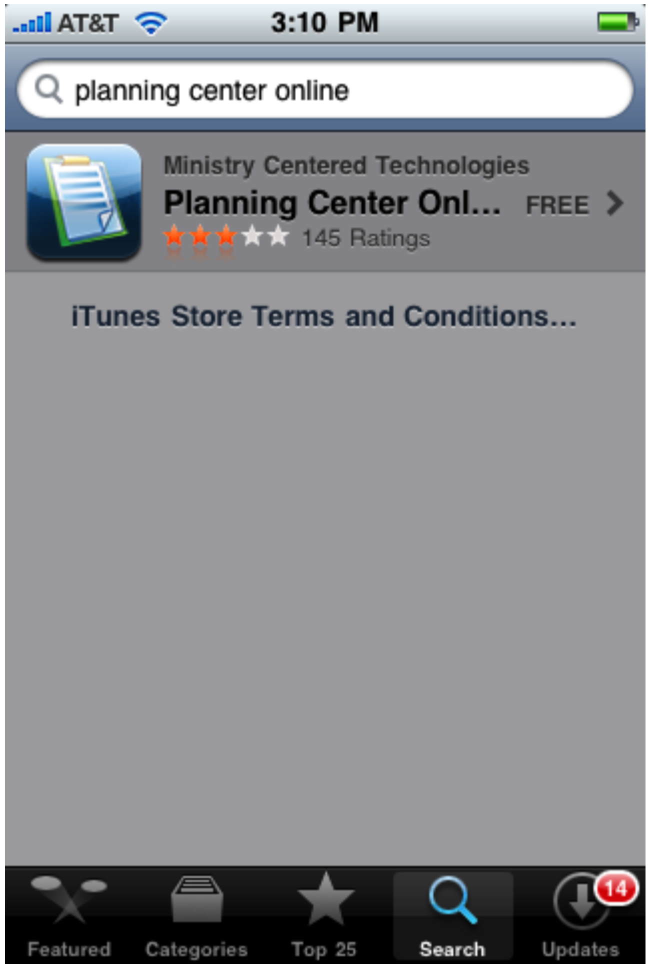


Once you're signed up for the facebook app, it will show up on your profile page. This is also convenient for administrators, as they can look through their people to see who has the facebook app.

iPhone App

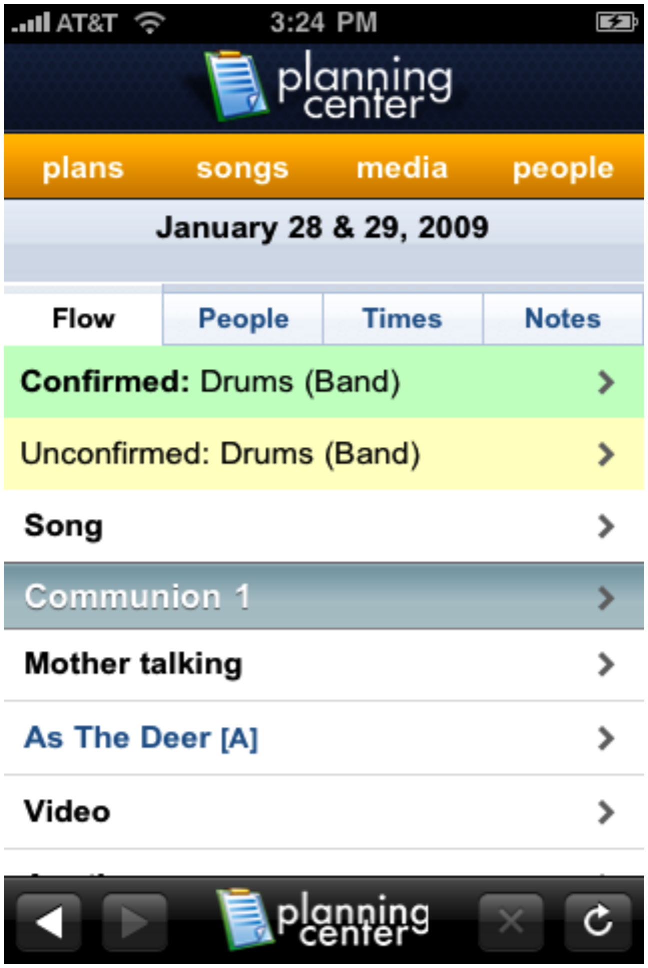
This manual gives you helpful information about downloading and using the iPhone App.

Our iPhone App can be downloaded in the App Store.



In the App Store, search for Planning Center Online. The app is free, but it does require a login to Planning Center in order to use it.

Once App is downloaded, using the site is easy!



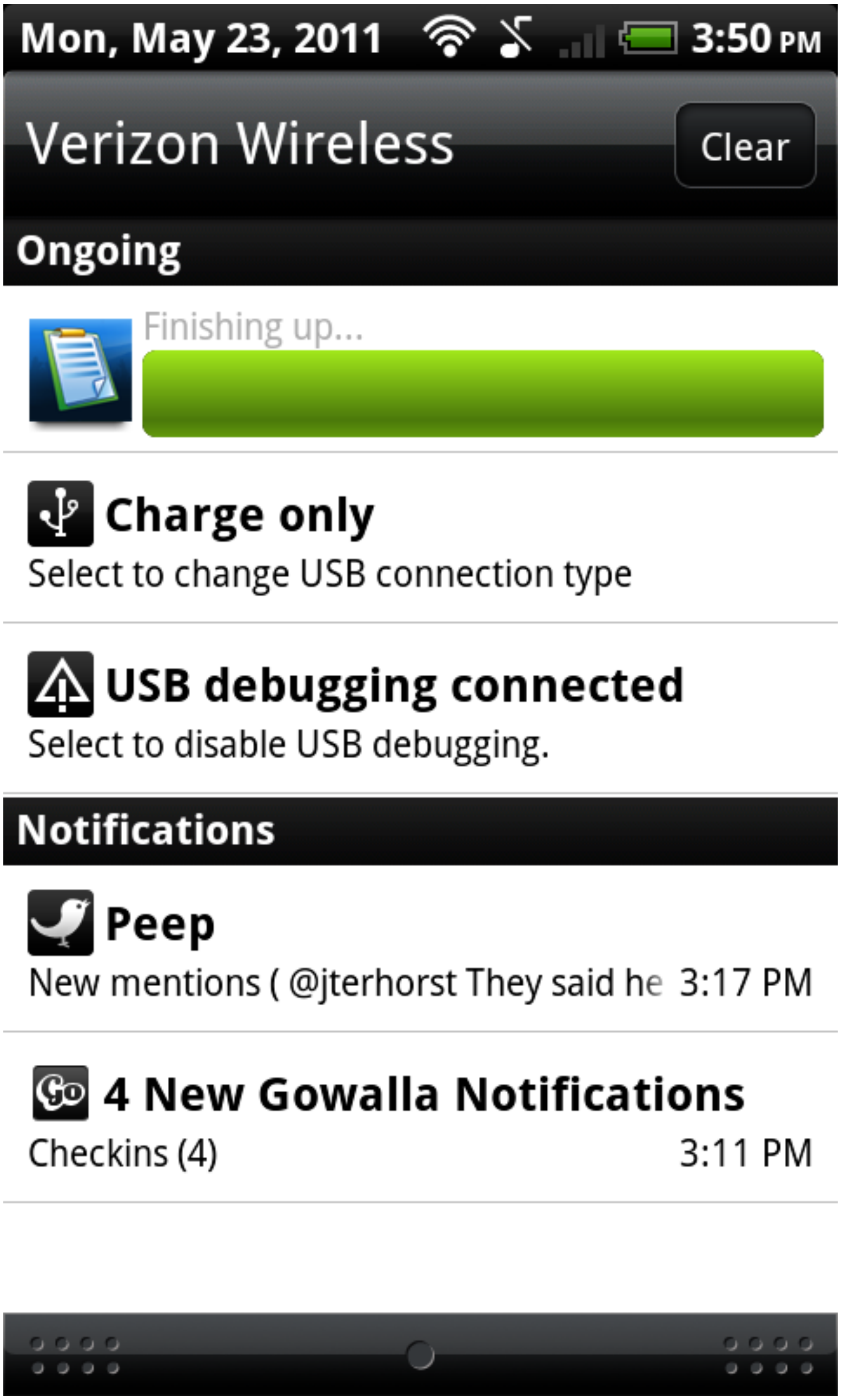
From the App, you can view services, songs, media, and people (of course, all that depending on your permissions). Use our easy buttons at the bottom to go to the last page or the next page, to refresh, or to exit out.

Note about listening to mp3's: since the security of downloading on a phone is different than on our regular site, all mp3's that have been set to not allow download will not be available to listen to on the phone.

Andriod App

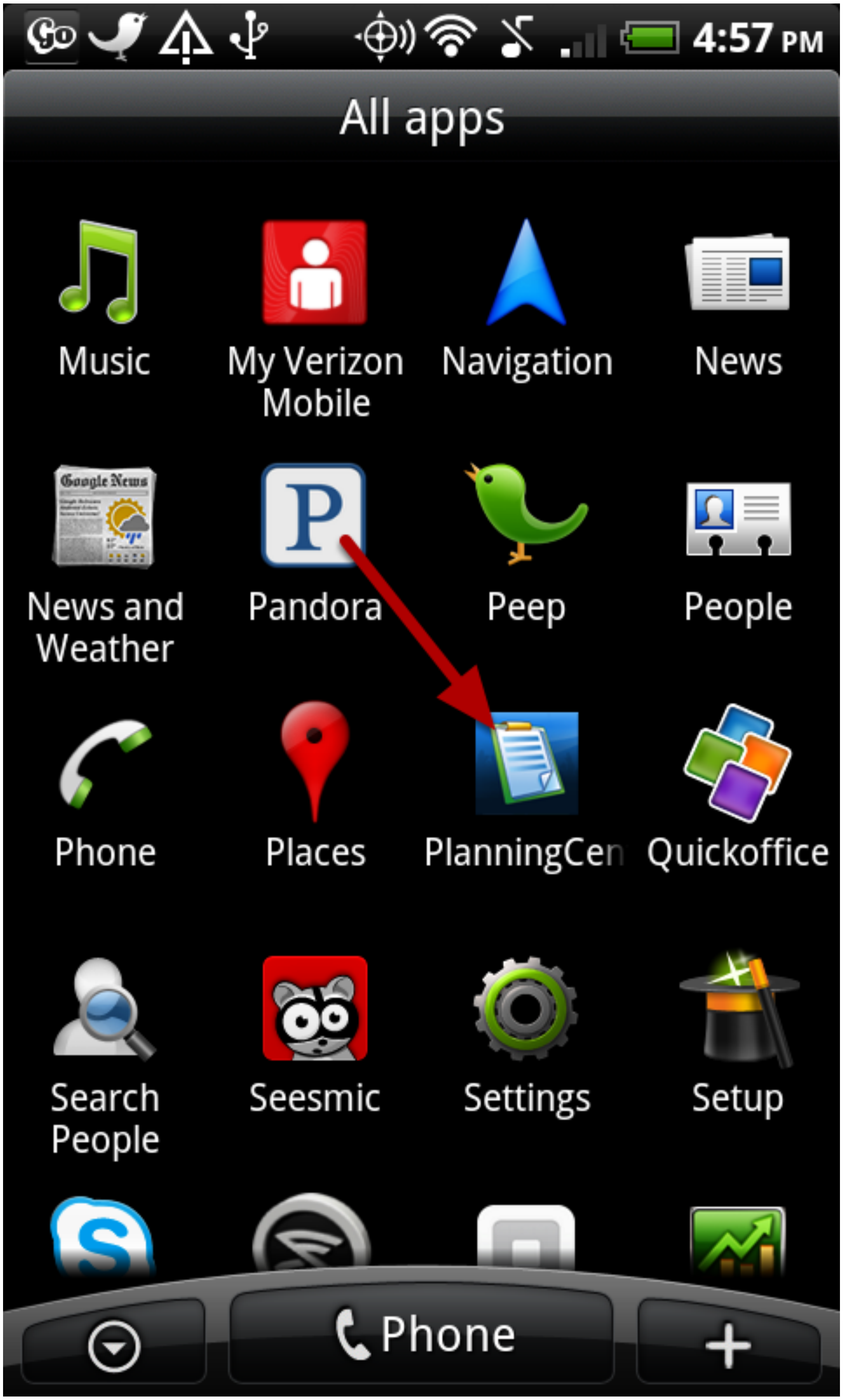
This Lesson will show you the basic ins and outs of our Planning Center Andriod App

Download the app from the Android Market

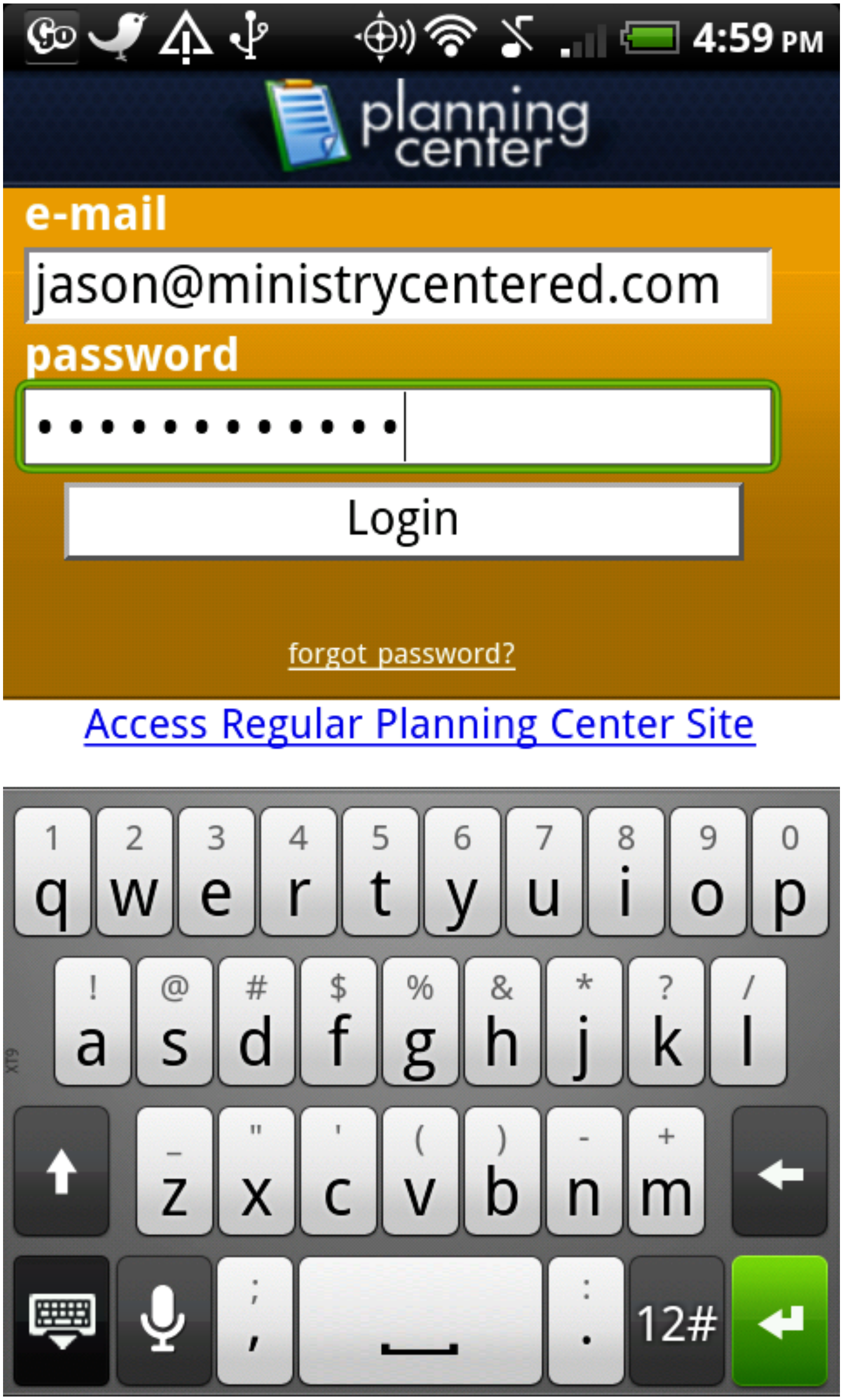


You can get the app at:
https://market.android.com/details?id=com.ministrycentered.PlanningCenter

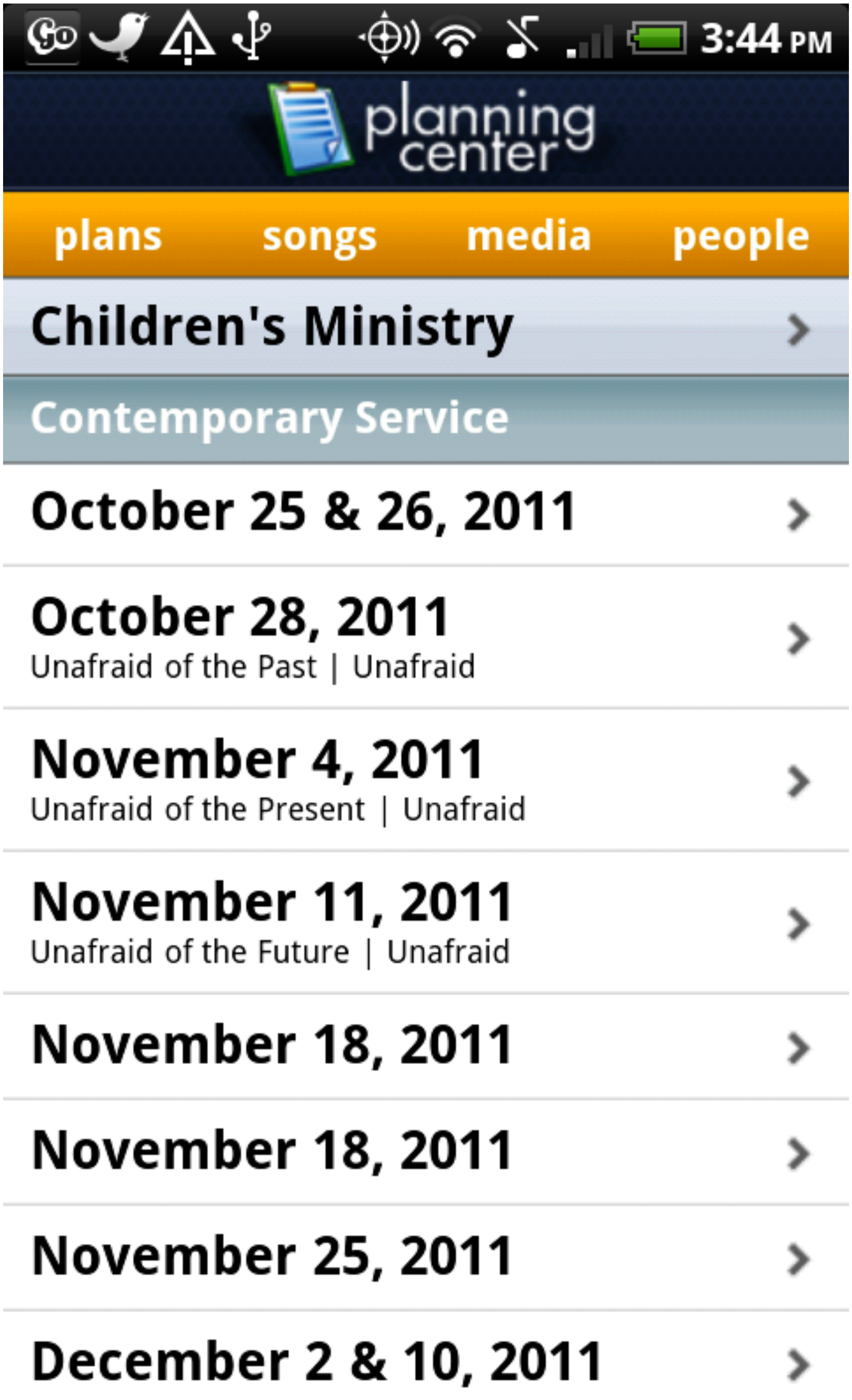
Tap the app on your dashboard to open it



You will need to enter you Planning Center Screen name and password to view your plans

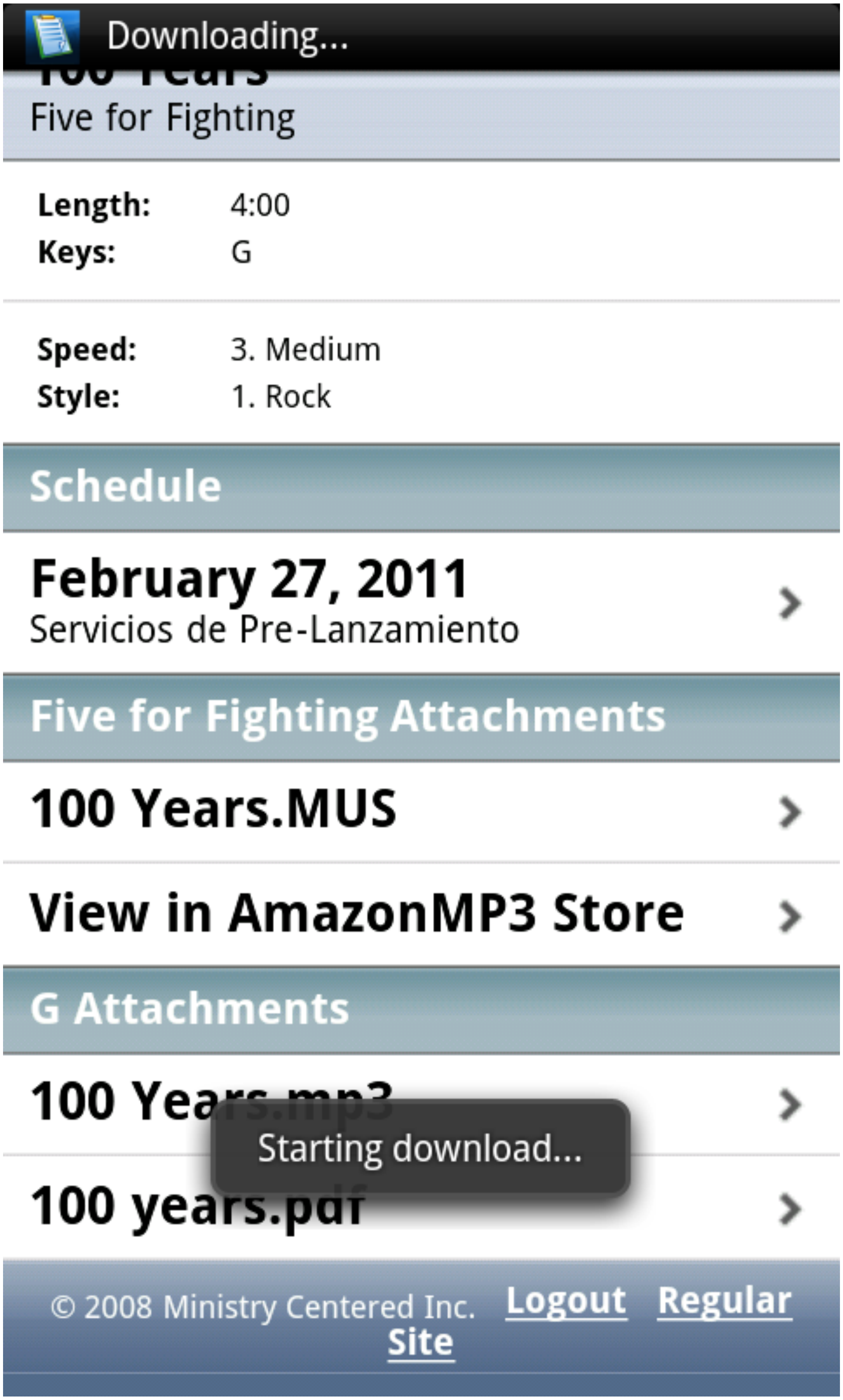


Select a Folder and/or Plan by tapping on them



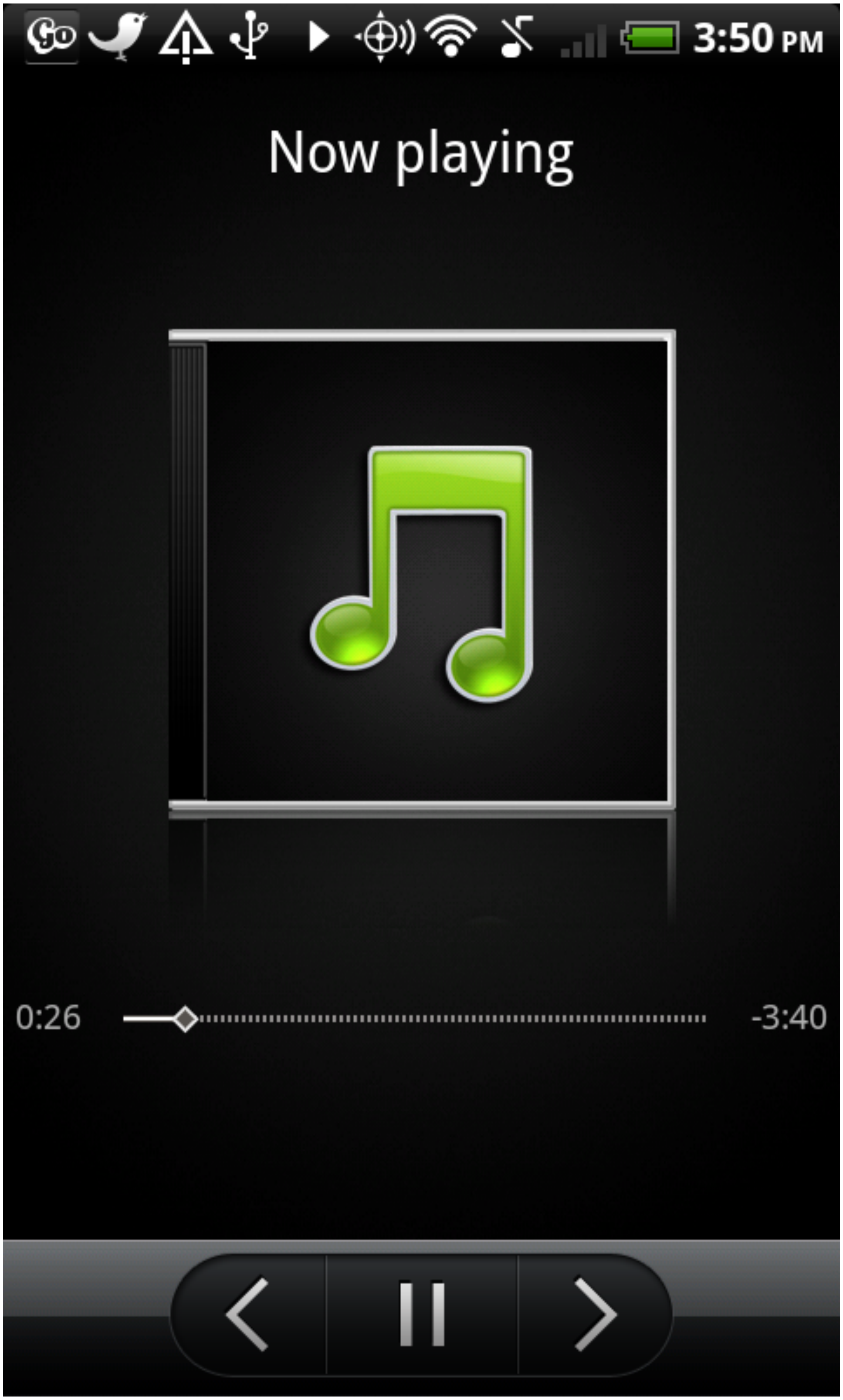
Once inside a plan you can schedule people, add Items or songs, and start Planning Center Live.

To Play a song, tap and hold it to download it to your phone.



Note: the Mp3's download settings will need to be set to 'True' on the site in order for you to play it on your phone.

Enjoy the practicing from your phone.



Attachments

Adding Attachments

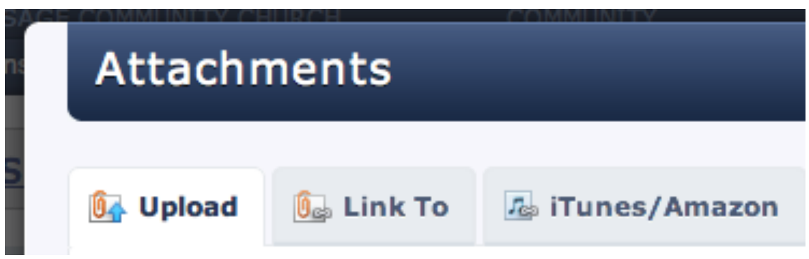
Learn how to add attachments to Planning Center

Click Add an Attachment

You can upload attachments by clicking the "Add an attachment" button from many places:

- Songs
- Plan Items
- Plans
- Service Types
- Media

Choose what kind of Attachment

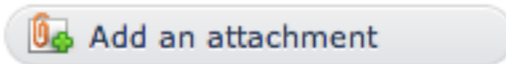


1. Upload a file from your computer
2. Link to a file on the internet
3. Link to a song on iTunes or AmazonMp3 - This is only an option when adding an attachment from a Song Arrangement page

Uploading an Attachment

Learn how to take a file from your computer and upload it to Planning Center.

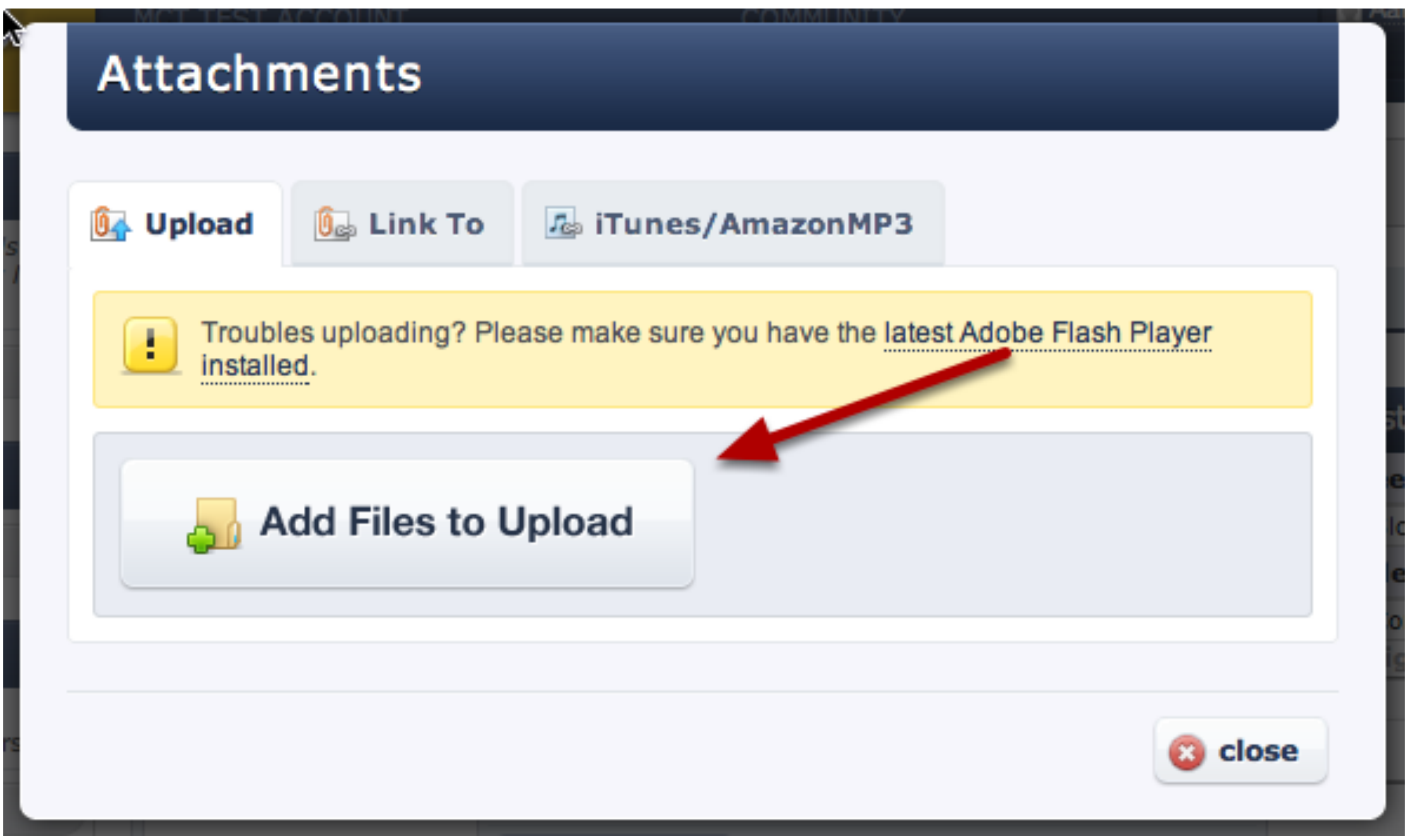
Click Add an Attachment



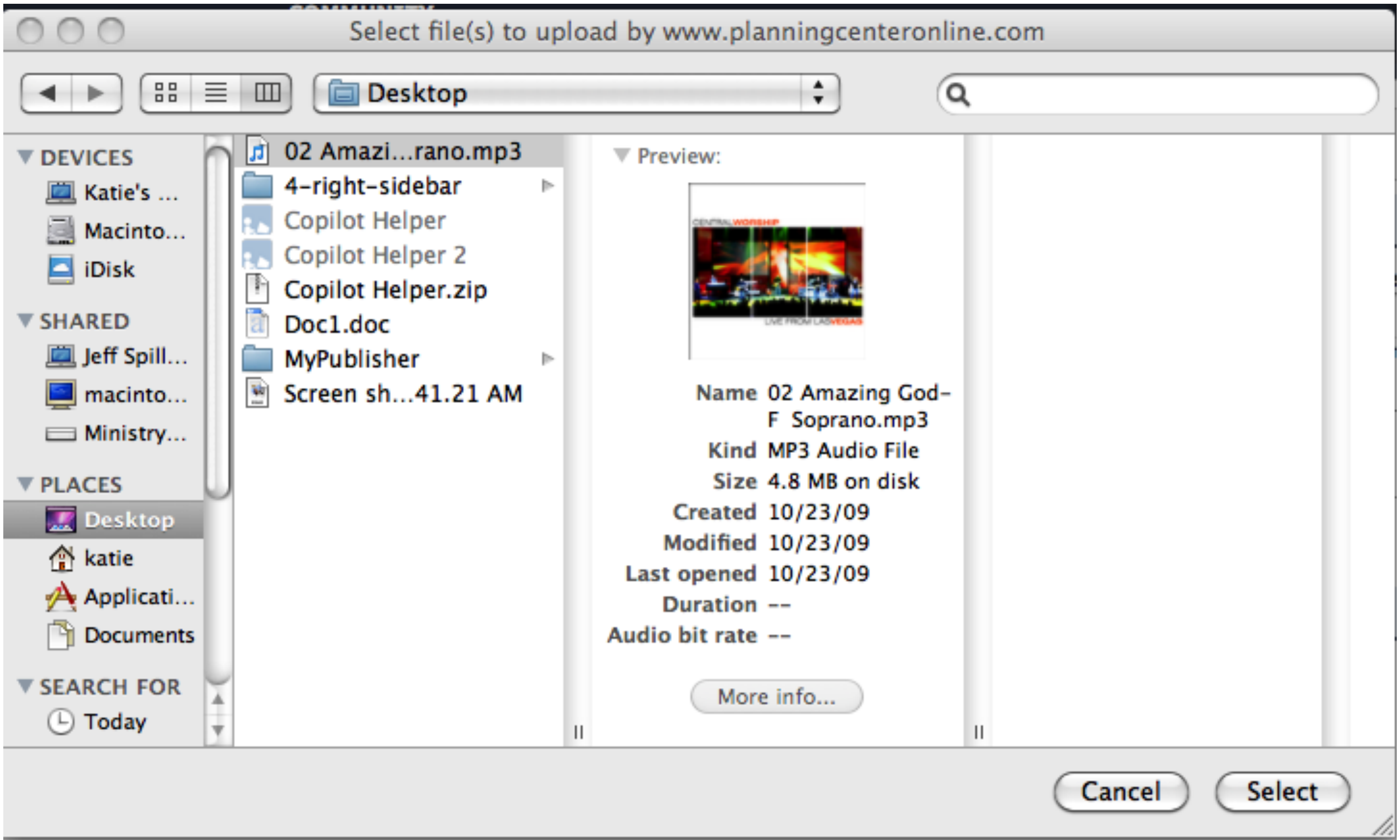
You can upload attachments by clicking the "Add an attachment" button from many places:

- Songs
- Plan Items
- Plans
- Service Types
- Media

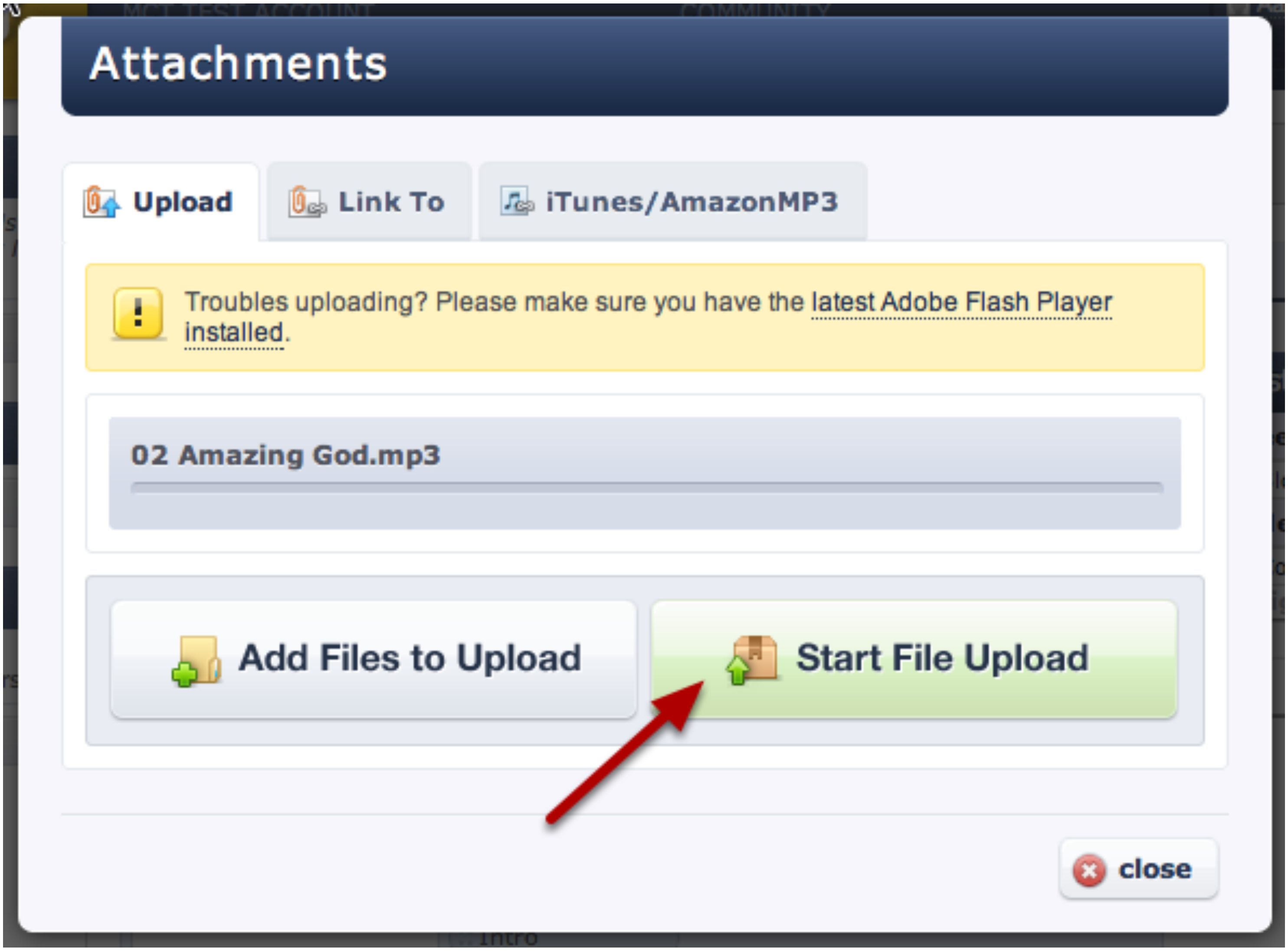
Click Add Files to Upload



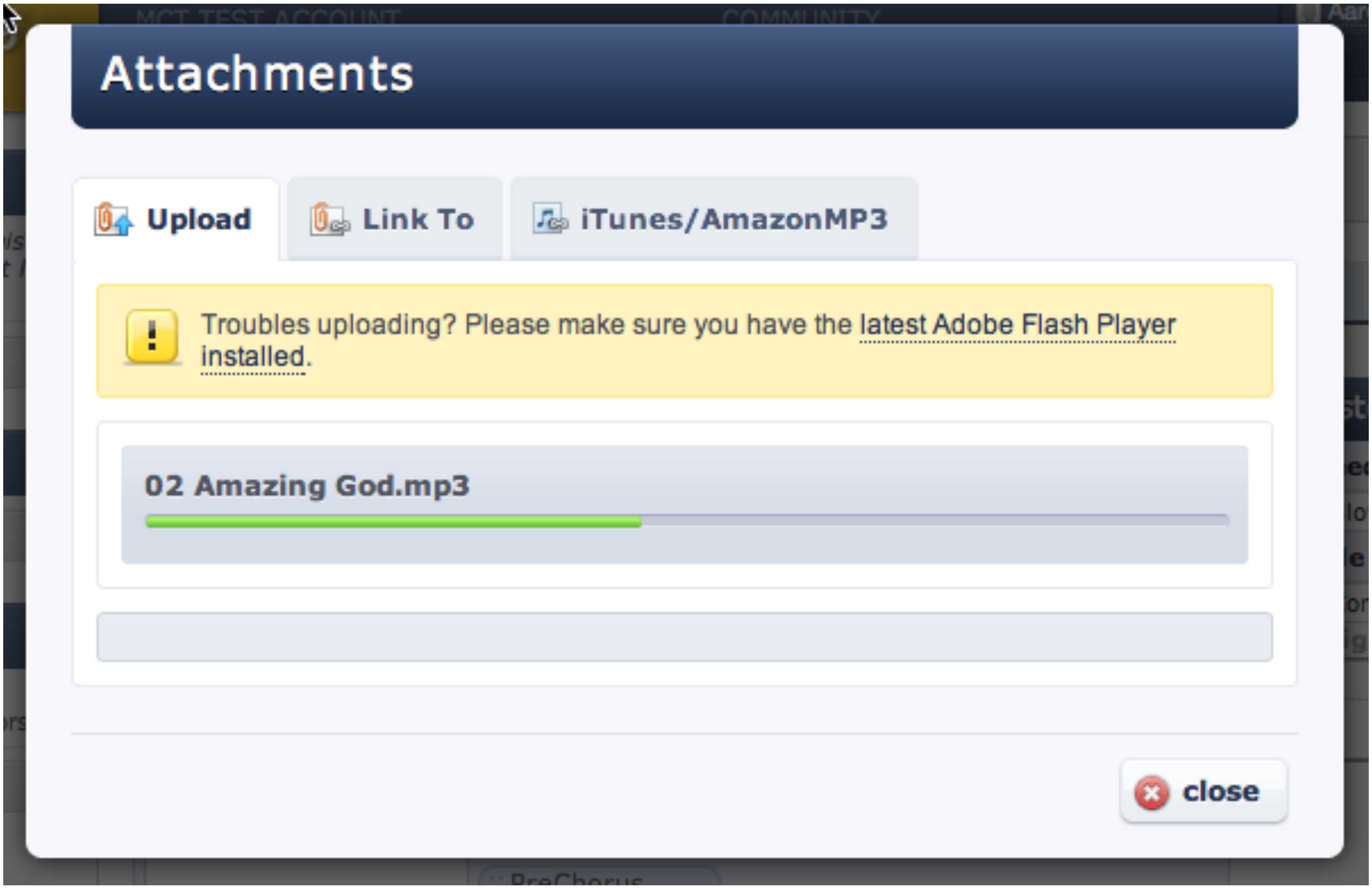
Choose the file from your computer then click Select



Click Start File Upload



Uploading In Progress



You will see the green progress bar move across as the file is being uploaded. If it gets stuck along the way or does not upload, please double-check to make sure you have the most updated version of Adobe's Flash Player.

Attachments Uploaded: Optional Settings

1. If you have uploaded an audio file, you will see the Download checkbox. If you do not want your people downloading the song, uncheck the box. You can change the default behavior of this checkbox in on the Site Settings page.

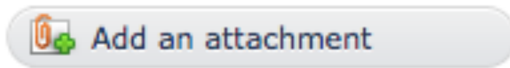
2. If you are uploading from a Song or Song Arrangement Page, you can also choose to attach this file to the song arrangement so it's available for all keys, or to attach it to a specific key.

When finished, click Accept.

Linking to an attachment

Learn how to add a link so a public file or page on the internet.

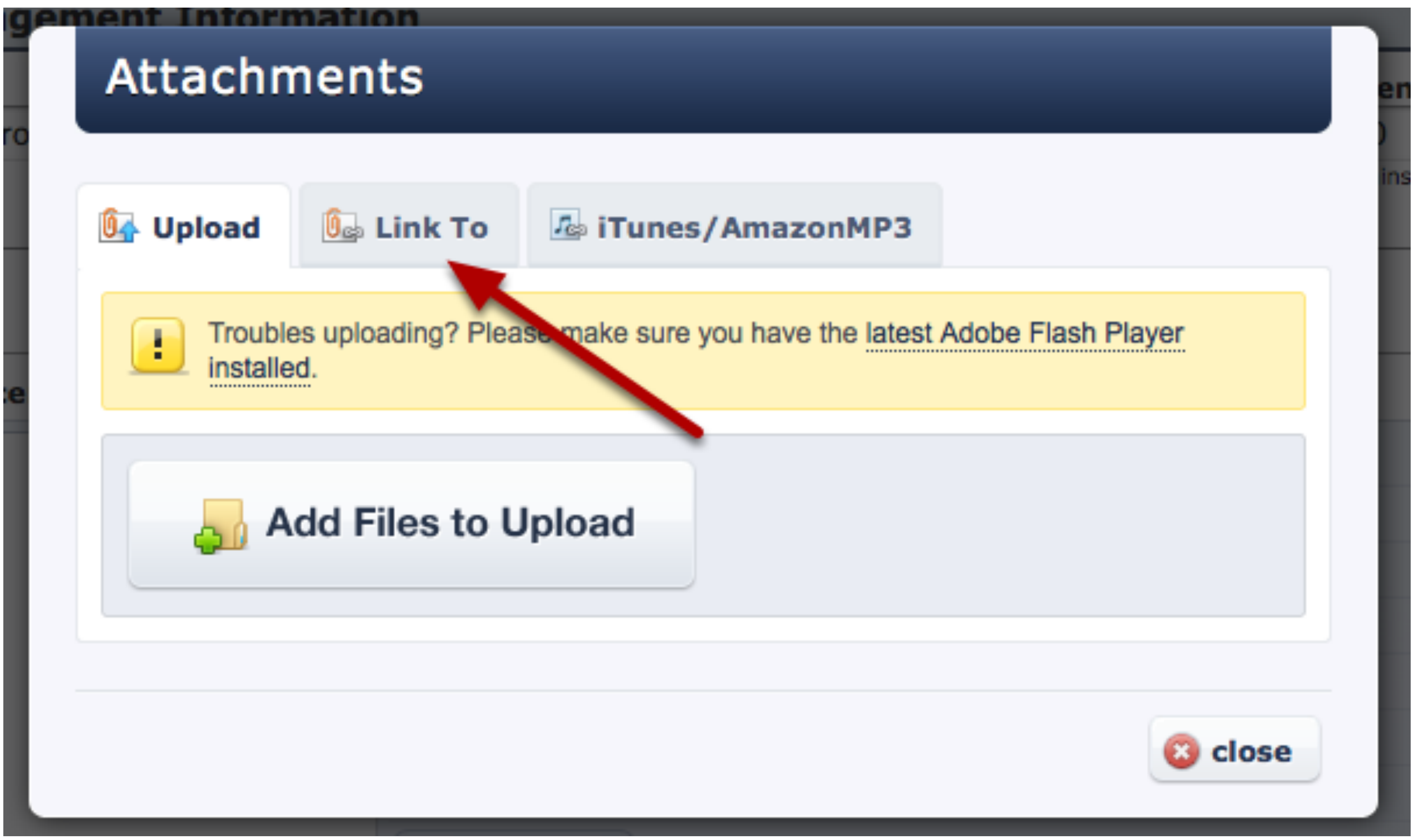
Click 'Add an attachment'



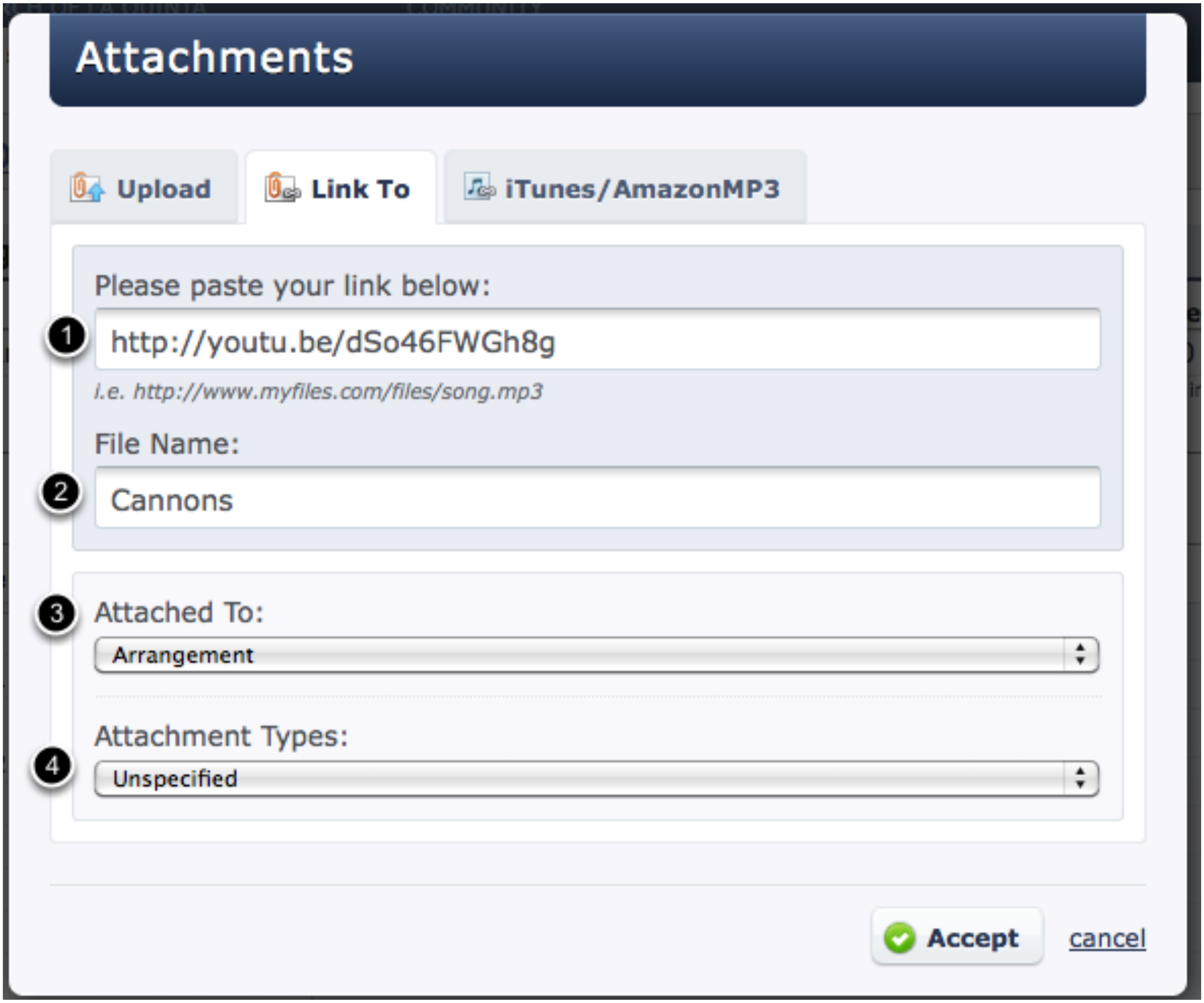
You can upload attachments by clicking the "Add an attachment" button from many places:

- Songs
- Plan Items
- Plans
- Service Types
- Media

Click on the 'Link To' tab



Paste the Link, Name It & Edit Attachment Options

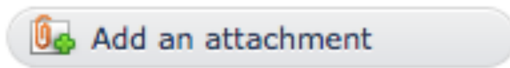


1. Paste the link to where your file is located on the internet.
2. The File Name is what your users will click on from Planning Center to go to the link
3. If you are uploading to a song, choose to attach this link to an arrangement so that it is available for all keys, or to a specific key.
4. If you are using our advanced Attachement Types feature to link specific files with specific features, set the Attachment Type here.

Linking to iTunes or AmazonMp3

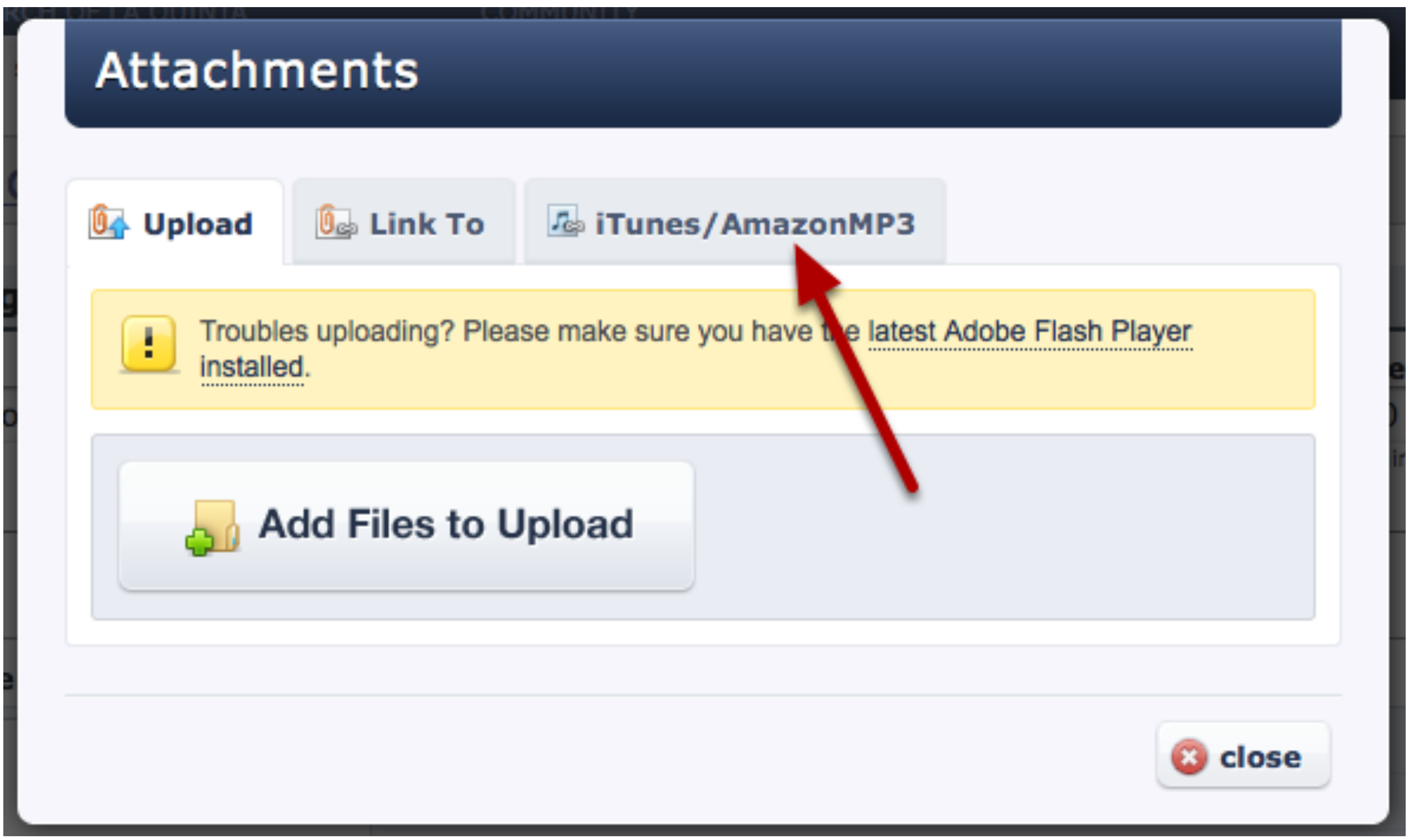
Learn how to easily add links to songs on iTunes or AmazonMp3.

Click 'Add an attachment'

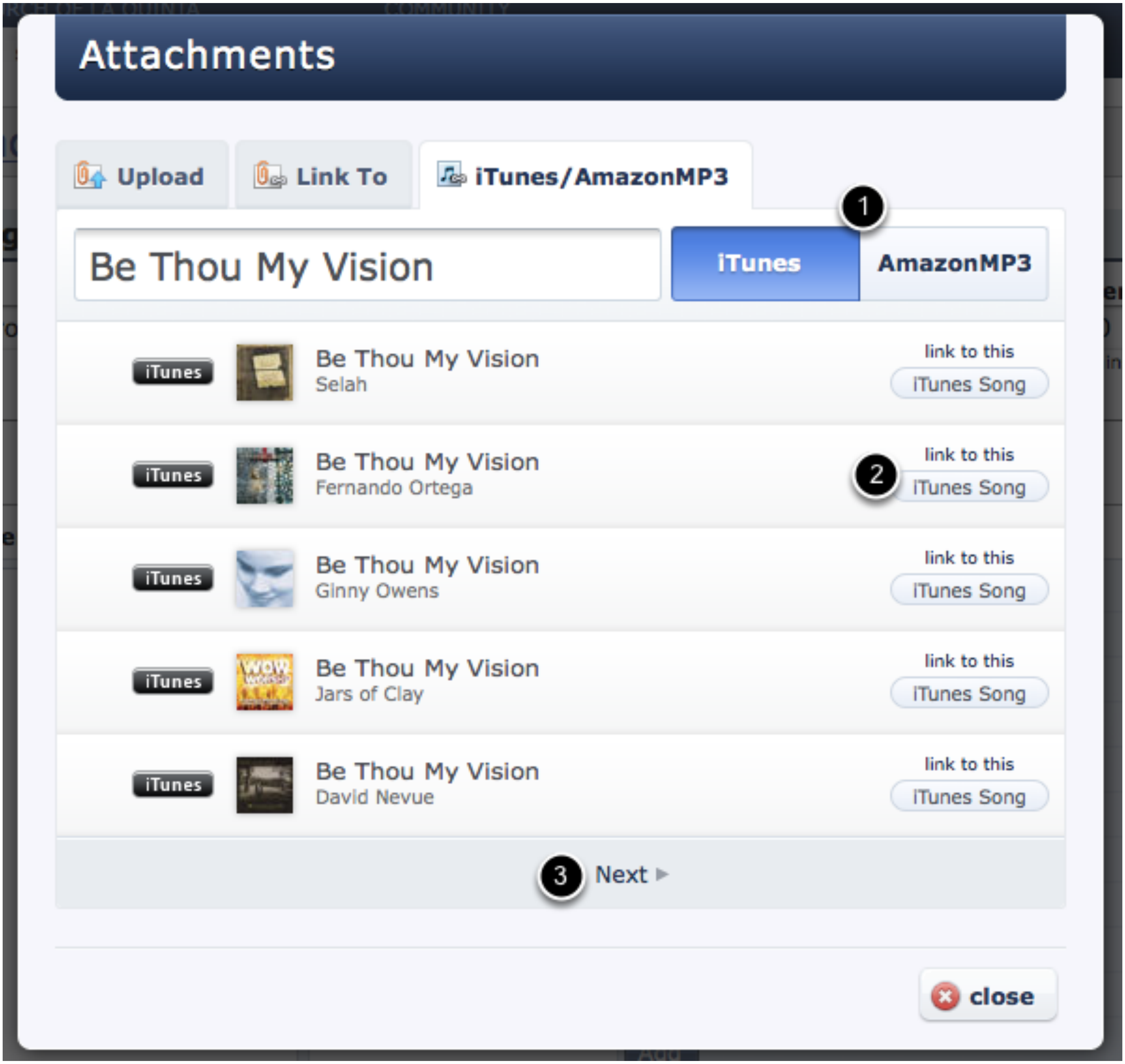


You can add attachments from many places, but you can only link to iTunes or AmazonMP3 from a Song Arrangement Page.

Click on the 'iTunes/AmazonMP3' tab



Select which version of the song you'd like your people to listen to/purchase.



The song title will automatically be added to the search bar, but you can also search by artist or album if you would like to get more specific results.

1. Click on the buttons to the right of the search bar to choose between iTunes/AmazonMP3 results.
2. Click 'link to this iTunes/AmazonMp3 Song' button to choose which version you would like to link to.

3. Click NEXT at the bottom of the page if you want another page of options.

See our lesson on changing your country to make sure that you and your users are receiving correct iTunes results.

Custom Reports

Custom Reports Wiki

One of the most powerful features in Planning Center Online is the ability to customize reports exactly how you want them. Customizing reports reuires a general knowledge of HTML, CSS and the Liquid Programming Language which is used to dynamically insert your data into the report. Instructions for using Liquid in Planning Center are below.

The Liquid Templating Language

At the center of the Planning Center Reporting process is a simple, yet powerful templating language called Liquid. Liquid is already used by some other large sites including the company who made it Shopify. Here are some helpful resources for this language:

- Liquid Template Language Website
- Liquid Template Language Usage Wiki

Report Types

There are several different reports that you can create

- Plan Report - The plan report adds on a single element called plan which is a Plan variable type
- Matrix Report - The matrix report adds on a collection of Plan variable types called plans which are the plans you have loaded in the Matrix
- People Report - The people report adds on a single element called people which is a Person variable type

Variable Types

- **Organization**
  - id
  - name
  - logo_url
  - logo_thumbnail_url

- **Ministry**
  - id
  - name
  - plan_item_note_categories - a collection of ***Ministry Category*** objects representing all item note categories for a ministry
  - plan_person_categories - a collection of ***Ministry Category*** objects representing all people categories for a ministry
  - plan_note_categories - a collection of ***Ministry Category*** objects representing all plan note

categories for a ministry
- parent.name - the name of the enclosing folder (add multiple levels of .parent to access more enclosing folders)

- **Ministry Category**
  - id
  - name

- **Plan**
  - id
  - series_title
  - plan_title
  - dates - string representation of dates (January 1 & 2, 2010)
  - ministry - a ***Ministry*** object representing the ministry that this plan is apart of
  - items - a collection of ***Plan Item*** objects representing every item in the plan
  - notes - a collection of ***Note*** objects representing every note for plan
  - plan_times - a collection of ***Time*** objects representing every plan time
  - rehearsal_times - a collection of ***Time*** objects representing every rehearsal time
  - plan_people - a collection of ***Plan Person*** objects representing everyone who has been scheduled
  - plan_people_not_declined - a collection of ***Plan Person*** objects representing everyone who has been scheduled and not declined
  - total_length - length of plan as a string represented as "mm:ss"
  - hour - number of hours in the total length (if a plan is 1hr 10 min, hour would return 1)
  - minutes - number of minutes in the total length (if a plan is 1hr 10min, minutes would return 10)
  - all_minutes - the total number of minutes in the plan (if a plan is 1hr 10 min, all_minutes would return 70)
  - seconds - number of seconds in the total length (if a plan is 1hr 10 min & 30sec, seconds would return 30)

- **Plan Item**
  - id
  - title
  - title_for_url - URL Encoded version of title, most commonly used to generate graphics
  - description
  - details
  - is_preservice - is this a pre-service item (currently doesn't appear to be set for header items)
  - is_postservice - is this a post-service item (currently doesn't appear to be set for header items)
  - length - length of item as a string represented as "mm:ss"
  - clean_length - same as length but with ":00" removed if present
  - length_since_last_header

- length_until_next_header
- length_until_end
- offset - length since start of service
- notes - a collection of ***Note*** objects representing every note for plan
- times - a collection of ***Plan Item Time*** objectest representing each time for this item
- has_any_times? - let's you know if this item has been included in any of the plan times
- item_type - a string representing which type of item this is ("Regular", "Header", "Song", "Media")
- song - a ***Song*** object representing the song for this item
- arrangement - an ***Arrangement*** object representing the song for this item
- key - a ***Key*** object representing the key for this item

- **Plan Item Time**
- time_id - id of ***Time*** object that this relates to
- actual_time - Time this item is planeed to occur as a ***DateTime*** object
- actual_start - Time this item actually occured after running Planning Center LIVE as a ***DateTime*** object
- actual_end - Time this item actually ended after running Planning Center LIVE as a ***DateTime*** object

- **Plan Person**
- position - position of this person
- category - a ***Ministry Category*** object representing this persons category
- person - a ***Person*** object representing this person
- status - a string representing the person's availability ("U" for unconfirmed, "C" for confirmed, and "D" for declined)
- service_times - a **Time** object representing this person's assigned plan times
- rehearsal_times- a **Time** object representing this person's assigned rehearsal times

- **Time**
- id
- name
- starts_at - starting time of plan
- ends_at - ending time of plan

- **Note**
- category_name - name of category note is in
- note - actual not as string

- **Song**
- title
- author
- copyright

- themes
- ccli_id
- notes

- **Arrangement**
  - name
  - length
  - sequence
  - bpm
  - chord_chart
  - lyrics
  - music_key
  - notes

- **Key**
  - name
  - starting
  - ending
  - to_s

- **Person**
  - first_name
  - last_name
  - name - full name
  - addresses
  - phone_numbers
  - emails
  - notes
  - photo_url
  - photo_thumbnail_url
  - block_out_dates - a collection of Availability objects representing every future availability option
  - future_plan_people - a collection of Plan objects representing every future confirmed or unconfirmed request
  - confirmed_future_plan_people - a collection of Plan objects representing every future confirmed request
  - custom_properties
  - logged_in_at - the date and time the person last logged in to Planning Center

- **Address**
  - street
  - city
  - state

- zip
- type_name

- **E-Mail Address**
  - address
  - type_name

- **Phone Number**
  - number
  - type_name

- **Availability**
  - name
  - starts_at

- **Custom_Property**
  - field
  - option

- **Field**
  - id
  - name
  - people

- **Option**
  - id
  - name
  - people

General Variables

- now - the current date/time
- current_user - a ***Person*** object representing the logged in user
- report.title - the name of the custom report

Matrix Only Variables

- order_of_service_opened - true or false based on if the *order of service* section is expanded
- plan_notes_opened - true or false based on if the *plan notes* section is expanded
- category_with_positions - a collection of ***Category*** objects with Positions representing all people categories

- **Category**

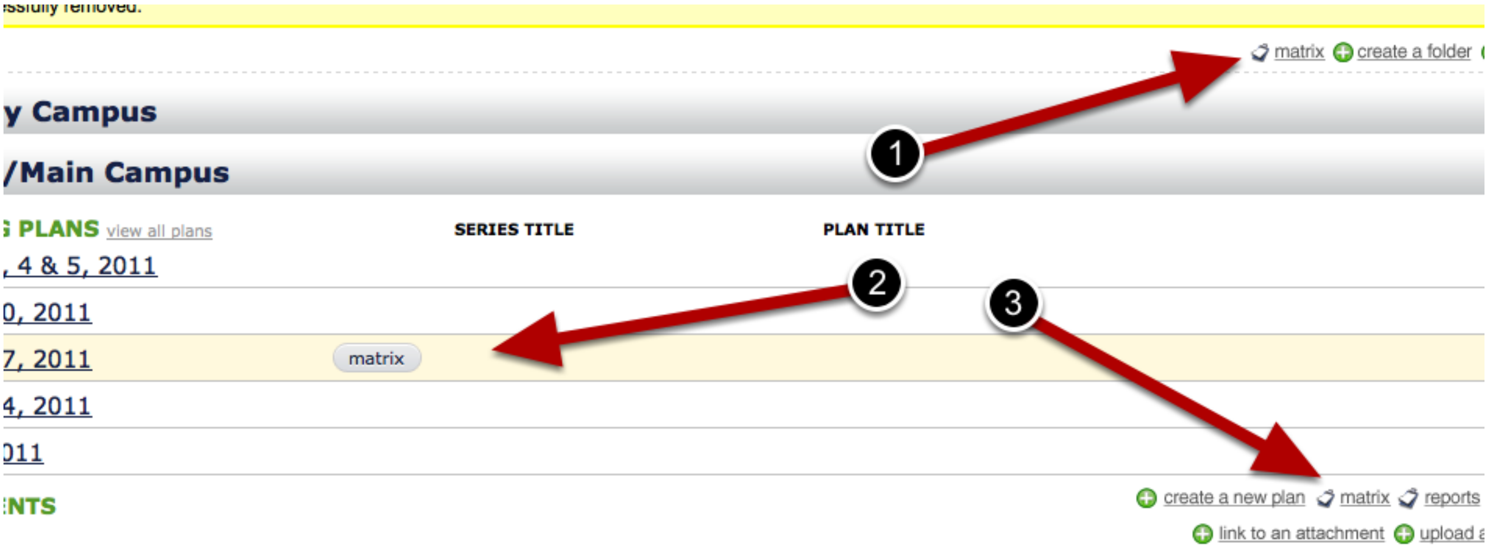
- name
- opened - true or false based on of if the *Position Category* is expanded
- positions - a collection of ***Position*** objects representing all categories

- **Position**
- name

The Matrix

Setting Up The Matrix

Click Matrix

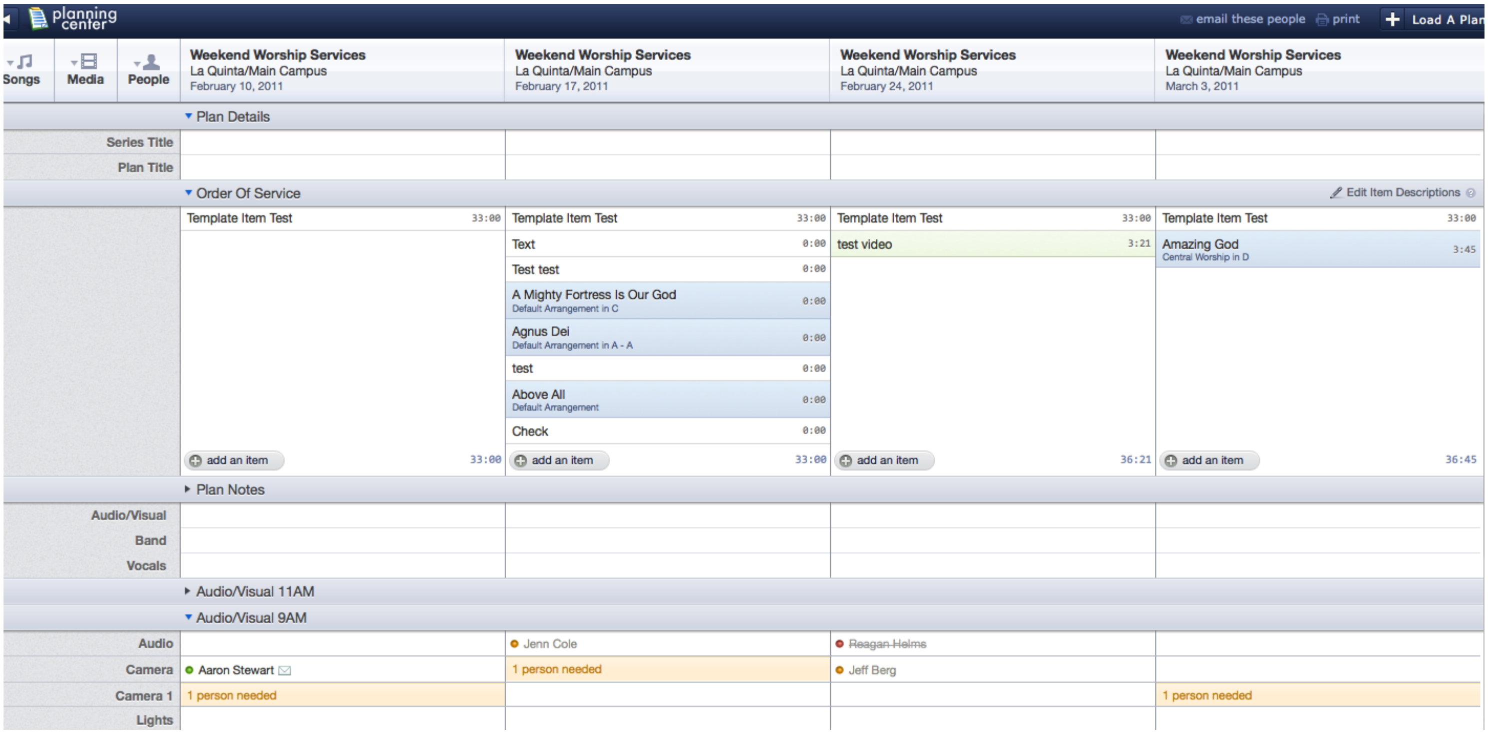


There are 4 places to click Matrix, three are displayed above:

1- In the top right corner of the main Plans page
The default settings for this matrix can be changed if you are in a folder, you can change that default, by clicking the pencil next to the folder name and choosing a different number of previous and next plans to load.

2- By clicking the matrix button that appears when you hover over a plan
3- On the bottom right of each individual service
4- Inside each individual plan, in the top right corner
You can change these settings for each service type by editing your service properties. Click properties at the bottom of your service type, click edit next to Service Properties and then change the defaults.

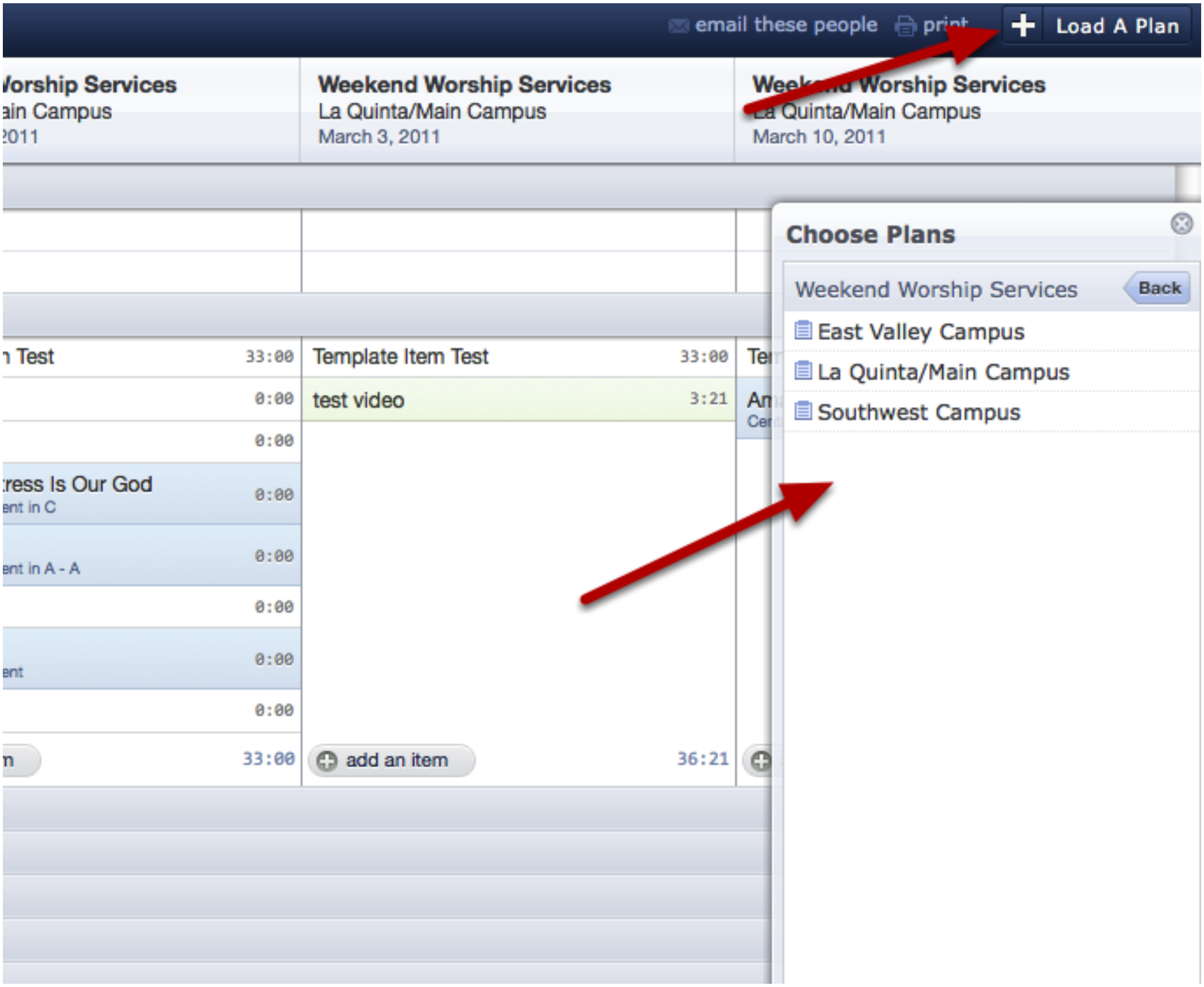
View Matrix and Schedule



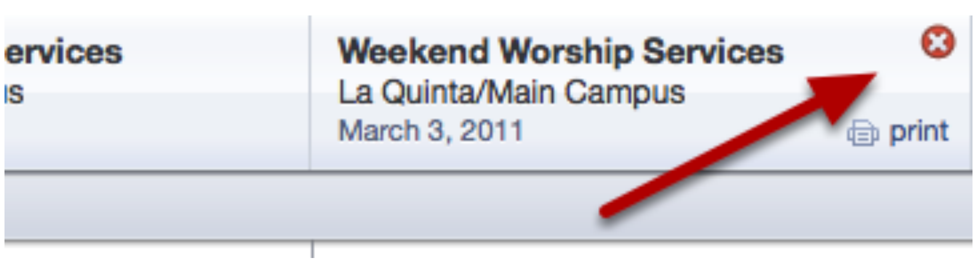
Once the matrix is loaded, you'll be able to schedule and edit people and songs. You can also edit the series and plan titles, send notifications, and print reports through the Matrix.

One of the best things about the Matrix, is that it's updated in real time. If someone adds an item to any plan you're looking at in the Matrix, it will automatically show up, and if any people accept or decline, a notification will pop up to let you know.

Loading and Removing Plans



To add a plan, click on the 'Load A Plan' button in the upper right corner, and then select the desired folder, service and plan from the list.

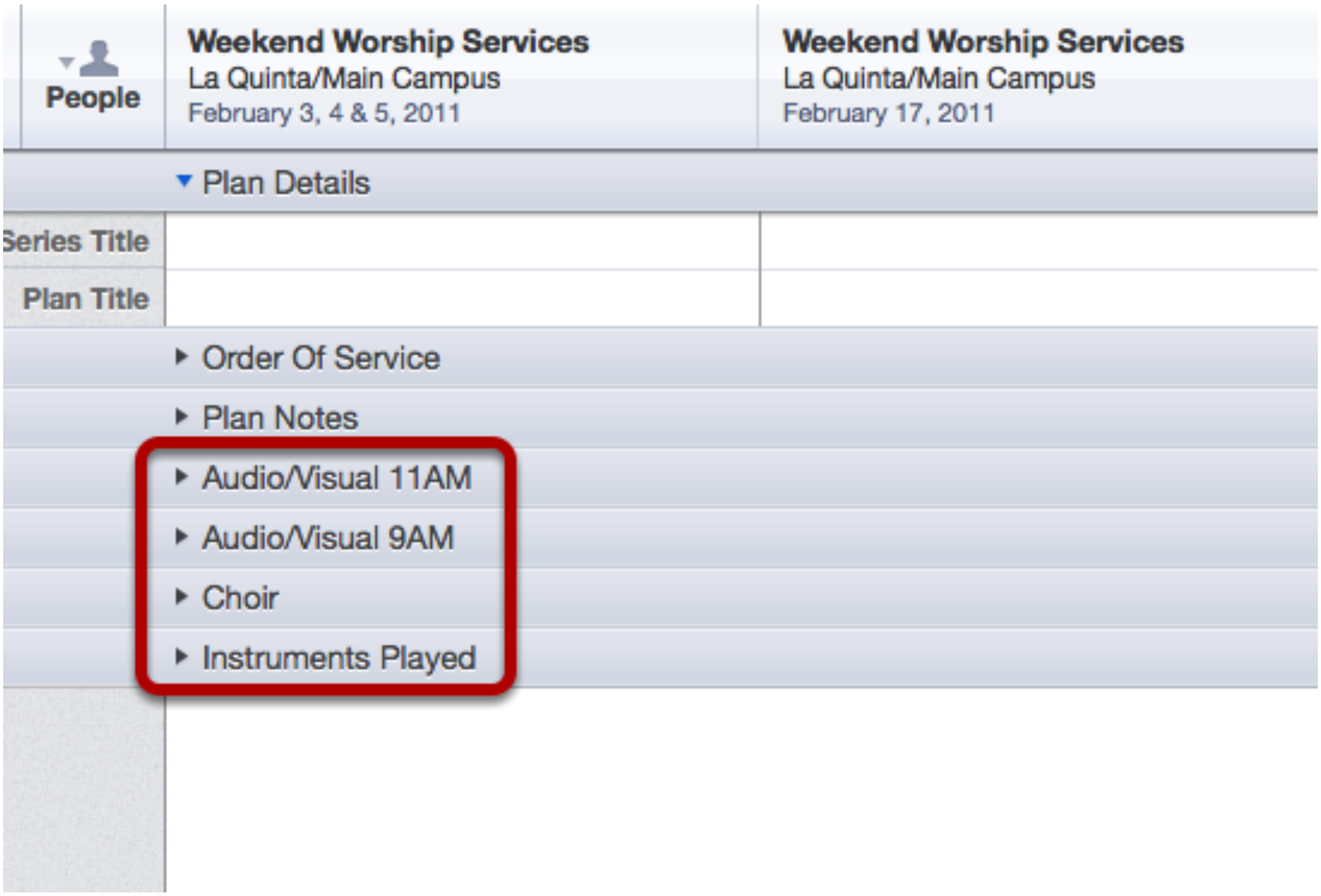


To remove a plan, hover your mouse over a plan title and click on the red 'X'.

Using The Matrix To Schedule

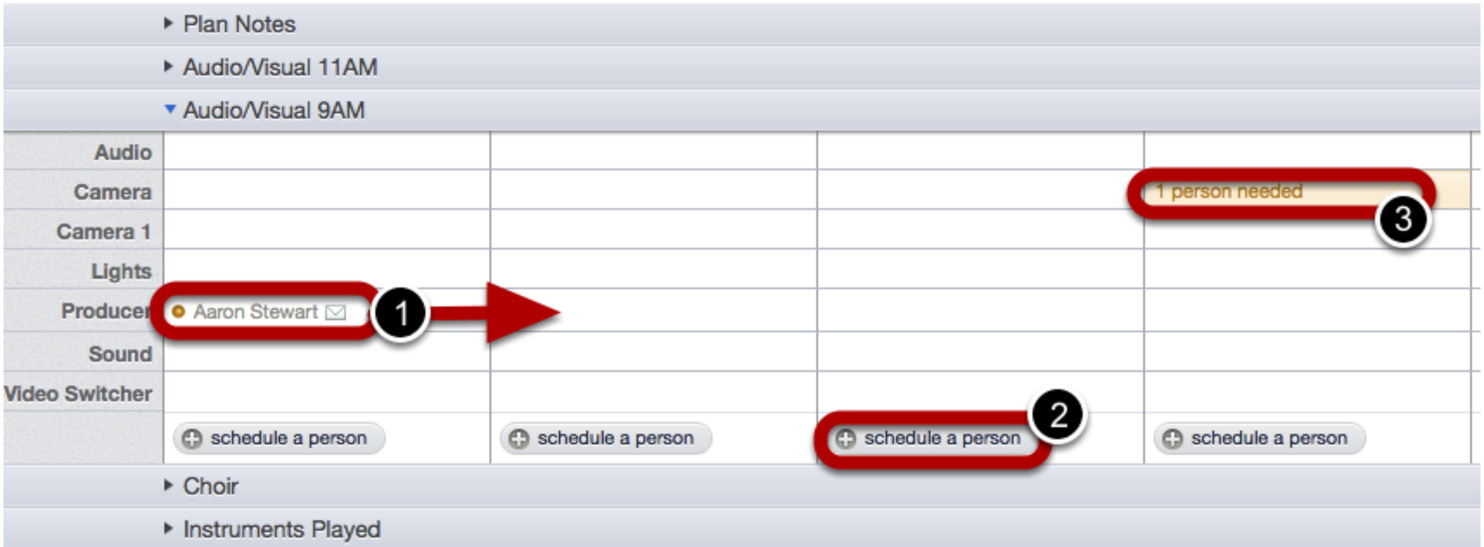
Using the Matrix, you can schedule many weeks at a time and consolidate multiple scheduling requests into one email per person. This lesson shows you how.

To Schedule People:



Click the drop-down arrows next to the category that you wish to schedule. It will expand, as shown in the next step.

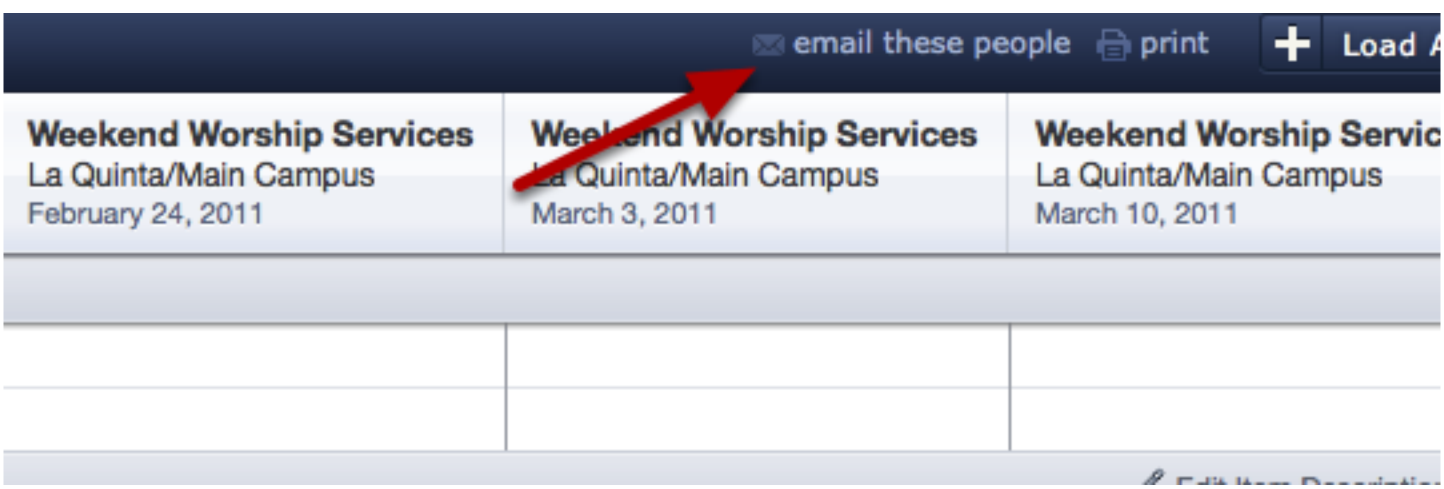
Drag and drop, add a person, or link for more people needed.



There are 4 ways you can schedule people in the matrix:

1. **Drag and drop**- Hold the name of the person you wish to schedule and drag them into the location you want them in. It will add them to that position and prepare a notification for them.
2. **Click 'Schedule a Person'**. This will give you the same dialog box as you would get when you're in the main plan and click 'Schedule A Person'.
3. **1 More Person Needed**. If needed positions are set up in plans, you will see all those options in the matrix. Click on those links to schedule from your filtered list.
4. You can also schedule people using the Libraries Sidebar on the left.

To email through the Matrix, click 'email these people'



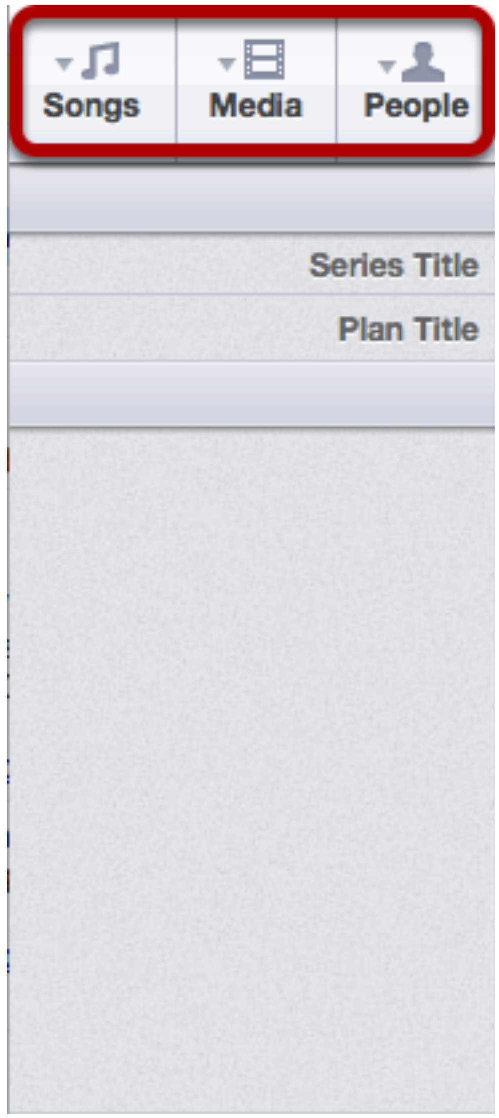
Clicking 'email these people' through the matrix will compile one email for all people who are scheduled multiple times. This is convenient if you have someone on a schedule for many dates, and you want them to just receive one email instead of 3 or 4. They will still respond to each individual date, but it will cut back on the number of emails being sent to their inbox.

For more information on emailing your people, see our lesson on Sending Notification Emails.

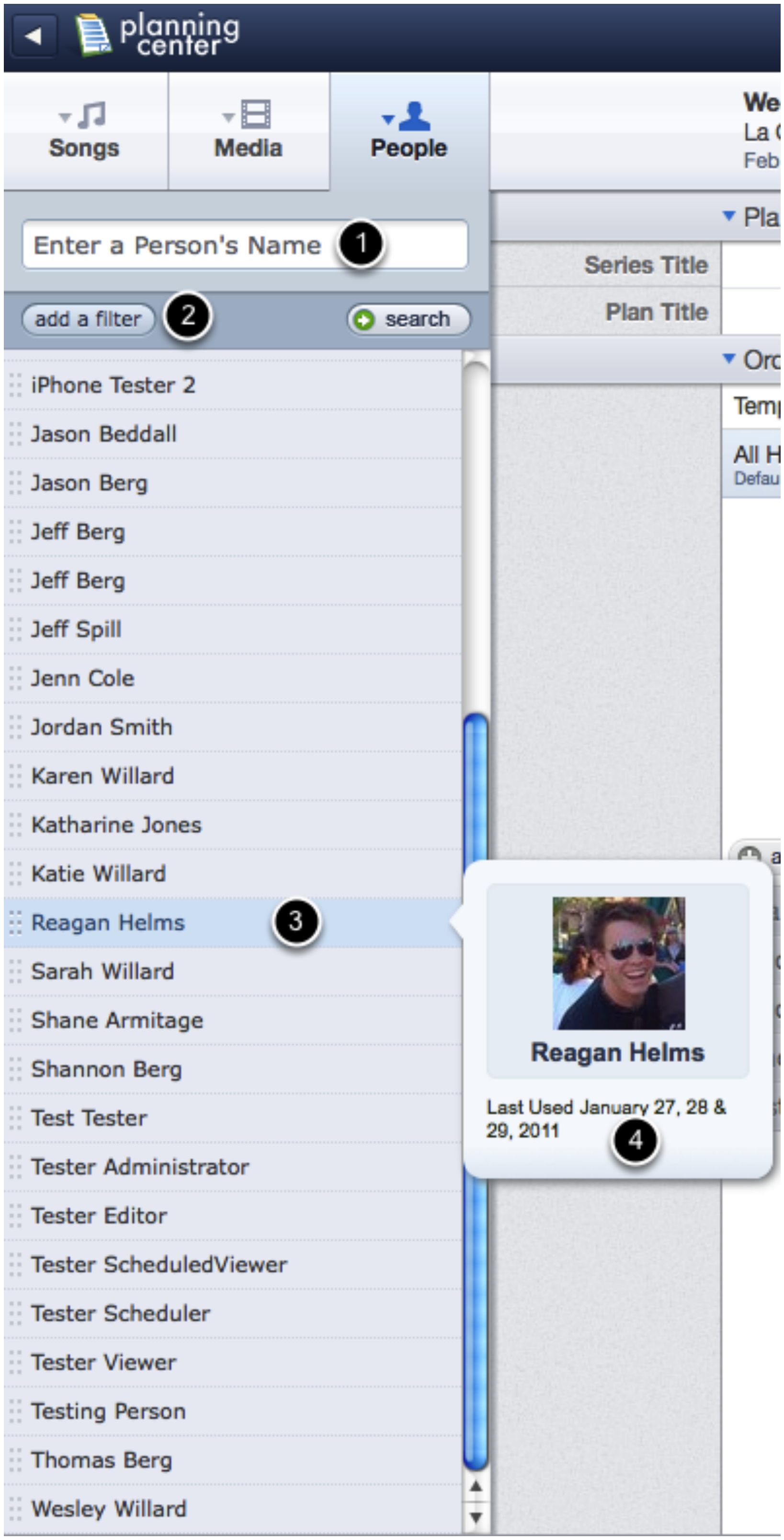
Using the Matrix Libraries Sidebar

This lesson shows you how to the Libraries Sidebar in the Matrix to browse & filter your people, songs & media and drag them to any plan.

Click on one of the Libraries in the left sidebar



Select People in the Sidebar by clicking on the "People" tab



1. Search people by name.
2. Filter people by Service Type, Custom Property, or Position.
3. Click and drag a person to the appropriate position and plan to schedule them.

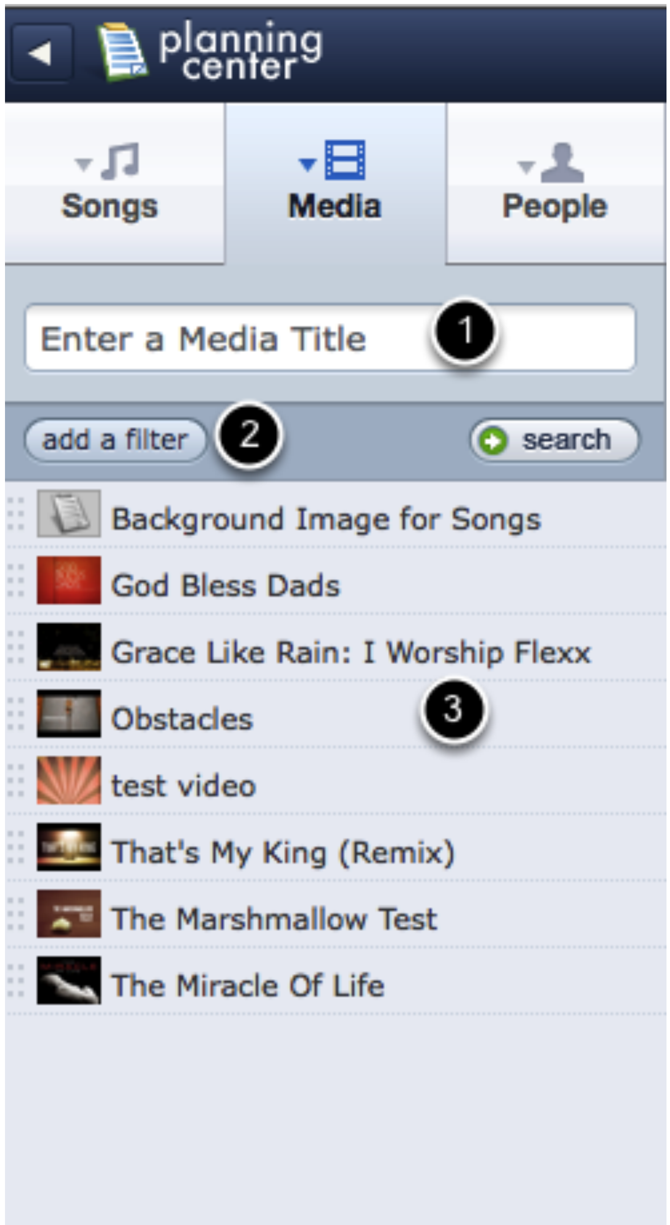
4. Vew a person's picture and past schedule by hovering over their name.

Select Songs in the Sidebar by clicking on the "Songs" tab

1. Search for a song title by name.
2. Filter your songs by song property, arrangement property, key property or a combination.
3. View song details, arrangements and keys by hovering over them. You can click and drag any

arrangement or key to schedule it to the appropriate plan.
4. Sample the audio file of a song by clicking on the play icon next to it.

Select Media in the Sidebar by clicking on the "Media" tab

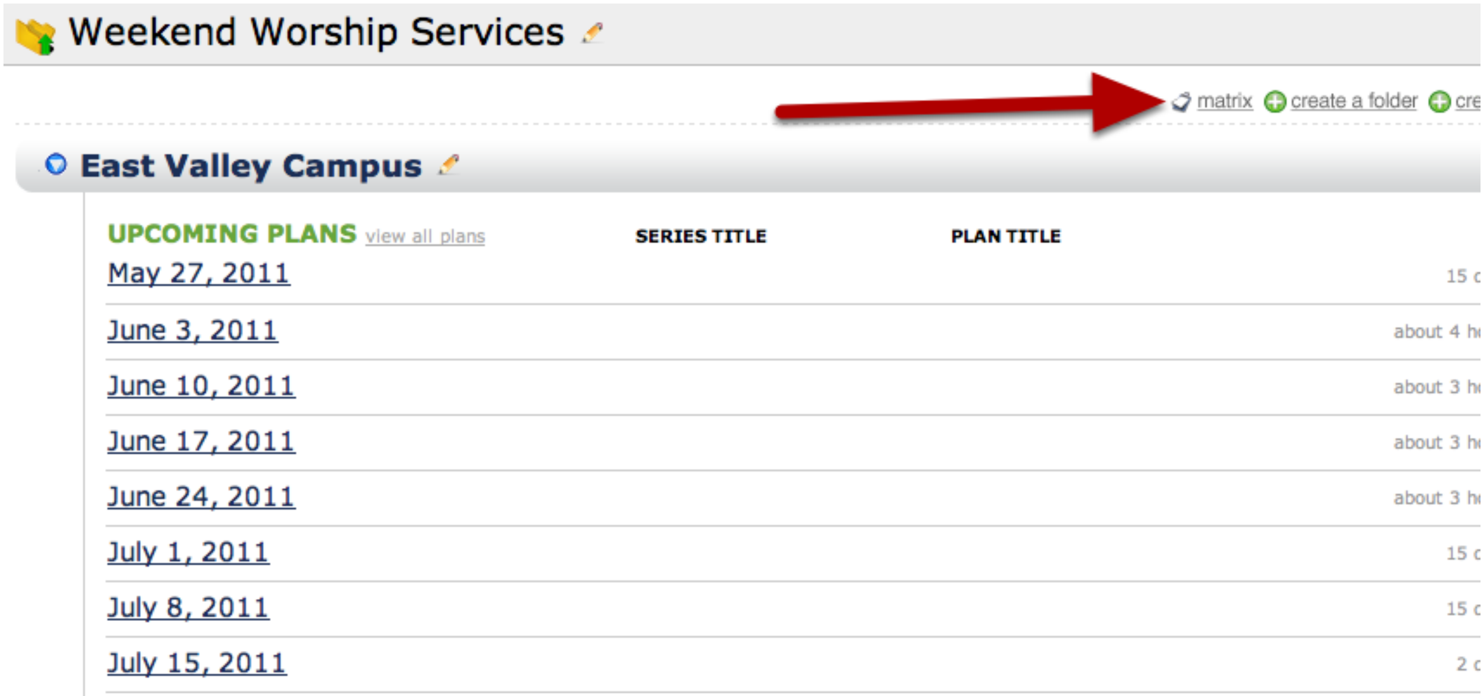


1. Search for a media title by name.
2. Filter your media by a selection of media properties.
3. Schedule a media item by clicking it and dragging it to the appropriate plan.

Matrix Reports

This lesson shows you what kind of reports you can generate in the Matrix.

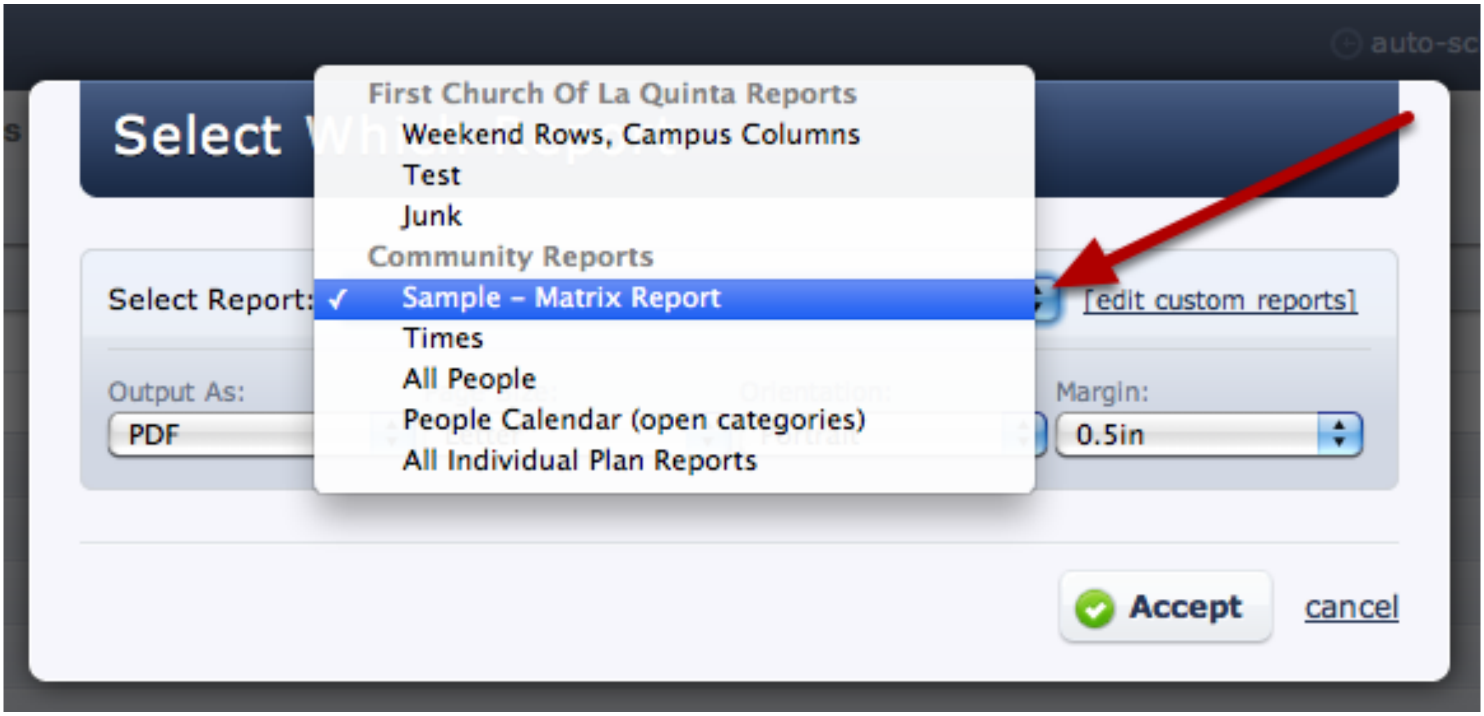
First load the matrix by clicking 'Matrix' in the top right corner of your screen.



Once dates are loaded, click 'Print'.

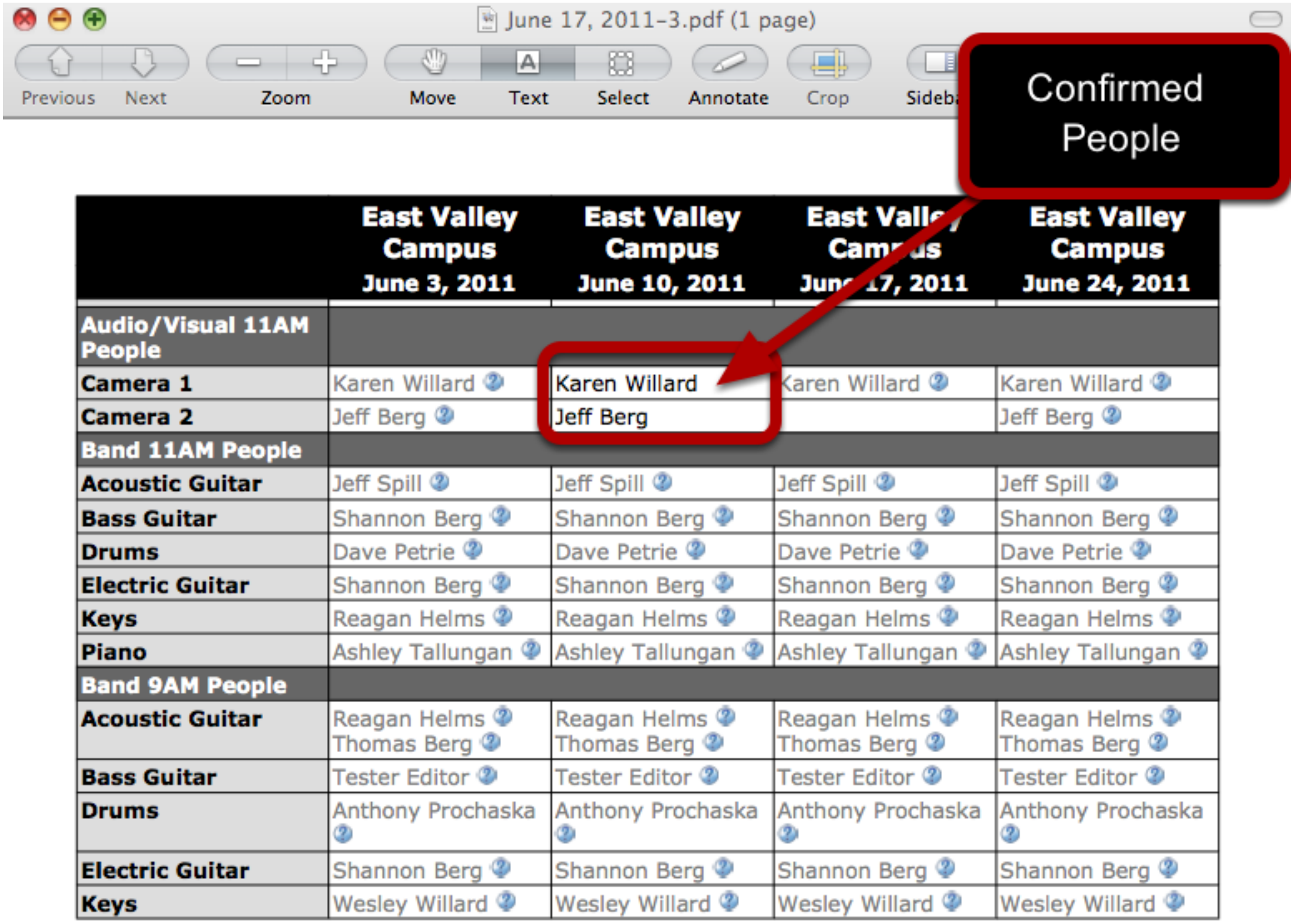
Here you can see I've decided to load all of the plans for my East Valley Campus for June. I'd like to see a few reports for this month so I'm going to click Print and the options will come up for me.

Click the arrows to see the Community Report options available.



I'm going to select the highlighted report, "Sample- Matrix Report". The rest of the community reports will be shown in the next few steps.

This is what your SAMPLE MATRIX REPORT looks like:

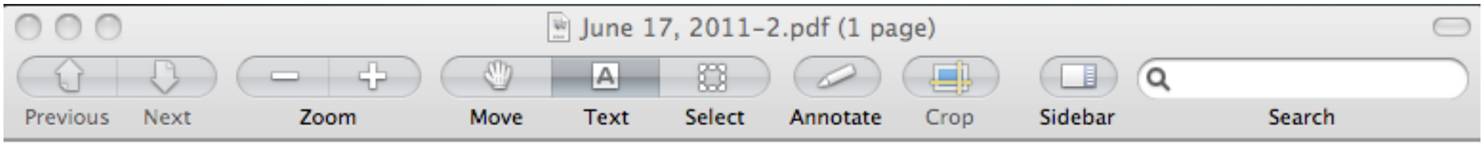


	East Valley Campus June 3, 2011	East Valley Campus June 10, 2011	East Valley Campus June 17, 2011	East Valley Campus June 24, 2011
Audio/Visual 11AM People				
Camera 1	Karen Willard	Karen Willard	Karen Willard	Karen Willard
Camera 2	Jeff Berg	Jeff Berg		Jeff Berg
Band 11AM People				
Acoustic Guitar	Jeff Spill	Jeff Spill	Jeff Spill	Jeff Spill
Bass Guitar	Shannon Berg	Shannon Berg	Shannon Berg	Shannon Berg
Drums	Dave Petrie	Dave Petrie	Dave Petrie	Dave Petrie
Electric Guitar	Shannon Berg	Shannon Berg	Shannon Berg	Shannon Berg
Keys	Reagan Helms	Reagan Helms	Reagan Helms	Reagan Helms
Piano	Ashley Tallungan	Ashley Tallungan	Ashley Tallungan	Ashley Tallungan
Band 9AM People				
Acoustic Guitar	Reagan Helms Thomas Berg	Reagan Helms Thomas Berg	Reagan Helms Thomas Berg	Reagan Helms Thomas Berg
Bass Guitar	Tester Editor	Tester Editor	Tester Editor	Tester Editor
Drums	Anthony Prochaska	Anthony Prochaska	Anthony Prochaska	Anthony Prochaska
Electric Guitar	Shannon Berg	Shannon Berg	Shannon Berg	Shannon Berg
Keys	Wesley Willard	Wesley Willard	Wesley Willard	Wesley Willard

This report shows you all of the people scheduled under each category for each day. It also shows their status. If they have not yet replied, their name will appear grey and they will have a ? symbol next to their name. If they have confirmed, it will be in bold. If they have declined, their name will not show up there at all. This report does not show needed positions. Only those who have been scheduled.

Note: It will only show the categories that you have opened in the matrix. This allows you to pick and choose which categories show up in this report. In the matrix view, just click the arrow to the left of the category name to expand or close that category.

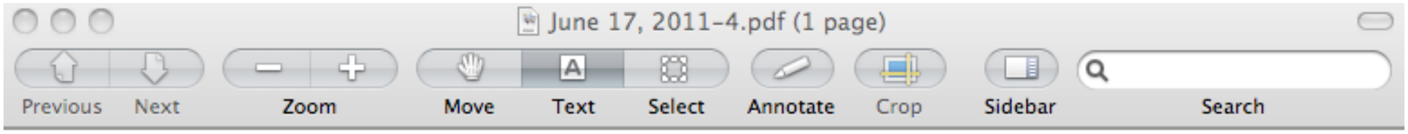
This is what the TIMES report looks like:



East Valley Campus June 3, 2011	East Valley Campus June 10, 2011	East Valley Campus June 17, 2011	East Valley Campus June 24, 2011
Plan Times	**Plan Times**	**Plan Times**	**Plan Times**
09:00 First Service 11:00 Second Service	09:00 First Service 11:00 Second Service	09:00 First Service 11:00 Second Service	09:00 First Service 11:00 Second Service
Rehearsal Times	**Rehearsal Times**	**Rehearsal Times**	**Rehearsal Times**
07:00	07:00	07:00	07:00

This report shows you all of the times and their titles for each date loaded in the matrix.

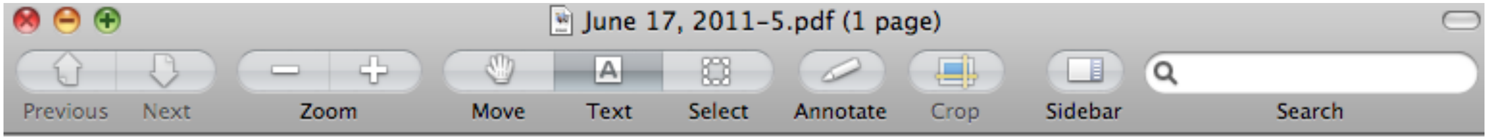
This is what the ALL PEOPLE report looks like:



East Valley Campus June 3, 2011	East Valley Campus June 10, 2011	East Valley Campus June 17, 2011	East Valley Campus June 24, 2011
Audio/Visual 11AM People	**Audio/Visual 11AM People**	**Audio/Visual 11AM People**	**Audio/Visual 11AM People**
Karen Willard *Camera 1* Jeff Berg *Camera 2*	Karen Willard *Camera 1* Jeff Berg *Camera 2*	Karen Willard *Camera 1*	Karen Willard *Camera 1* Jeff Berg *Camera 2*
Audio/Visual 9AM People	**Audio/Visual 9AM People**	**Audio/Visual 9AM People**	**Audio/Visual 9AM People**
Band 11AM People	**Band 11AM People**	**Band 11AM People**	**Band 11AM People**
Jeff Spill *Acoustic Guitar* Shannon Berg *Bass Guitar* Dave Petrie *Drums* Shannon Berg *Electric Guitar* Reagan Helms *Keys* Ashley Tallungan *Piano*	Jeff Spill *Acoustic Guitar* Shannon Berg *Bass Guitar* Dave Petrie *Drums* Shannon Berg *Electric Guitar* Reagan Helms *Keys* Ashley Tallungan *Piano*	Jeff Spill *Acoustic Guitar* Shannon Berg *Bass Guitar* Dave Petrie *Drums* Shannon Berg *Electric Guitar* Reagan Helms *Keys* Ashley Tallungan *Piano*	Jeff Spill *Acoustic Guitar* Shannon Berg *Bass Guitar* Dave Petrie *Drums* Shannon Berg *Electric Guitar* Reagan Helms *Keys* Ashley Tallungan *Piano*
Band 9AM People	**Band 9AM People**	**Band 9AM People**	**Band 9AM People**
Reagan Helms *Acoustic Guitar* Thomas Berg *Acoustic Guitar* Tester Editor *Bass Guitar* Anthony Prochaska *Drums* Shannon Berg *Electric Guitar* Wesley Willard *Keys*	Reagan Helms *Acoustic Guitar* Thomas Berg *Acoustic Guitar* Tester Editor *Bass Guitar* Anthony Prochaska *Drums* Shannon Berg *Electric Guitar* Wesley Willard *Keys*	Reagan Helms *Acoustic Guitar* Thomas Berg *Acoustic Guitar* Tester Editor *Bass Guitar* Anthony Prochaska *Drums* Shannon Berg *Electric Guitar* Wesley Willard *Keys*	Reagan Helms *Acoustic Guitar* Thomas Berg *Acoustic Guitar* Tester Editor *Bass Guitar* Anthony Prochaska *Drums* Shannon Berg *Electric Guitar* Wesley Willard *Keys*
Leaders 9AM People	**Leaders 9AM People**	**Leaders 9AM People**	**Leaders 9AM People**
Leaders 11AM People	**Leaders 11AM People**	**Leaders 11AM People**	**Leaders 11AM People**
Tech 9AM People	**Tech 9AM People**	**Tech 9AM People**	**Tech 9AM People**
Tech 11AM People	**Tech 11AM People**	**Tech 11AM People**	**Tech 11AM People**
Ushers 9AM People	**Ushers 9AM People**	**Ushers 9AM People**	**Ushers 9AM People**
Ushers 11AM People	**Ushers 11AM People**	**Ushers 11AM People**	**Ushers 11AM People**
Usher People	**Usher People**	**Usher People**	**Usher People**

This report shows you everyone you have scheduled for every category, whether opened or not. It also tells you their position underneath their name, and once again, shows you their status (confirmed or pending).

This is what the PEOPLE CALENDAR (open categories) report looks like:



Calendar

June 3, 2011	
Audio/Visual 11AM	
Camera 1	Karen Willard
Camera 2	Jeff Berg
Band 11AM	
Acoustic Guitar	Jeff Spill
Bass Guitar	Shannon Berg
Drums	Dave Petrie
Electric Guitar	Shannon Berg
Keys	Reagan Helms
Piano	Ashley Tallungan
Band 9AM	
Acoustic Guitar	Reagan Helms Thomas Berg
Bass Guitar	Tester Editor
Drums	Anthony Prochaska
Electric Guitar	Shannon Berg
Keys	Wesley Willard

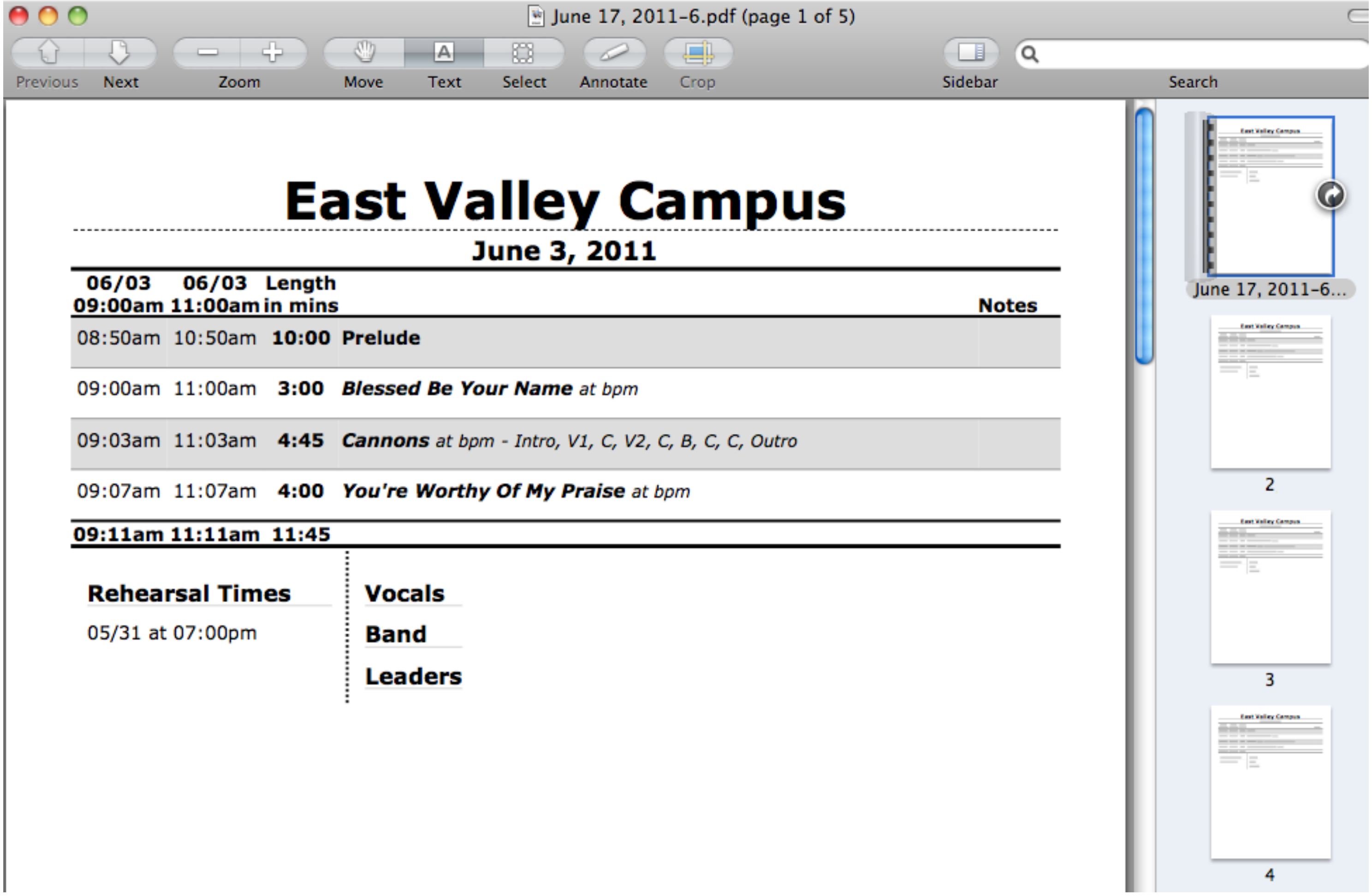
June 10, 2011	
Audio/Visual 11AM	
Camera 1	Karen Willard
Camera 2	Jeff Berg
Band 11AM	
Acoustic Guitar	Jeff Spill
Bass Guitar	Shannon Berg
Drums	Dave Petrie
Electric Guitar	Shannon Berg
Keys	Reagan Helms
Piano	Ashley Tallungan
Band 9AM	
Acoustic Guitar	Reagan Helms Thomas Berg
Bass Guitar	Tester Editor
Drums	Anthony Prochaska
Electric Guitar	Shannon Berg
Keys	Wesley Willard

June 17, 2011	
Audio/Visual 11AM	
Camera 1	Karen Willard
Camera 2	
Band 11AM	
Acoustic Guitar	Jeff Spill
Bass Guitar	Shannon Berg
Drums	Dave Petrie
Electric Guitar	Shannon Berg
Keys	Reagan Helms
Piano	Ashley Tallungan
Band 9AM	
Acoustic Guitar	Reagan Helms Thomas Berg
Bass Guitar	Tester Editor
Drums	Anthony Prochaska
Electric Guitar	Shannon Berg
Keys	Wesley Willard

June 24, 2011	
Audio/Visual 11AM	
Camera 1	Karen Willard
Camera 2	Jeff Berg
Band 11AM	
Acoustic Guitar	Jeff Spill
Bass Guitar	Shannon Berg
Drums	Dave Petrie
Electric Guitar	Shannon Berg
Keys	Reagan Helms
Piano	Ashley Tallungan
Band 9AM	
Acoustic Guitar	Reagan Helms Thomas Berg
Bass Guitar	Tester Editor
Drums	Anthony Prochaska
Electric Guitar	Shannon Berg
Keys	Wesley Willard

This report shows you all of the people scheduled to the different categories and positions for each day. Again, it shows everyone's status, and will only show open categories.

This is what the ALL INDIVIDUAL PLAN REPORTS report looks like:



This report will give you one PDF of all the plan flows with times and item notes. As you can see from the far right of this screen shot, it does compile each plan report from every day you have loaded in the matrix.

Custom Reports:

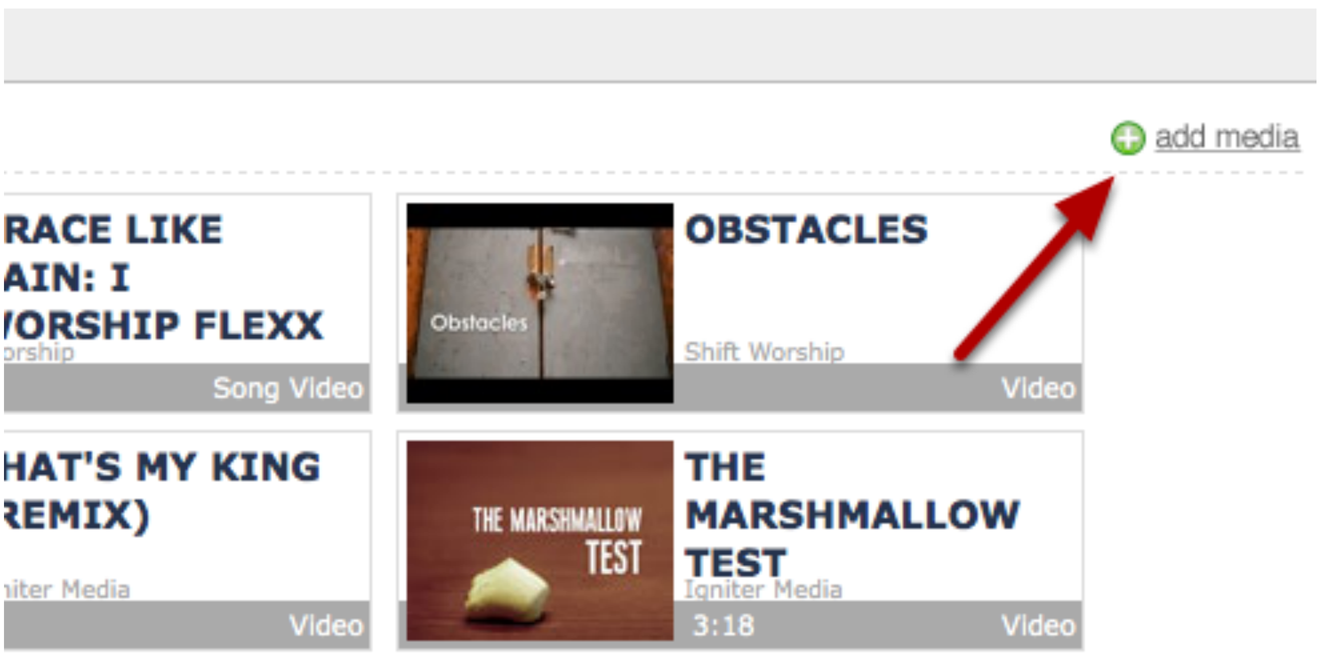
Custom Reports are available for you to create if you know some HTML. These reports will be listed at the top, under your church name Reports. If you wish to add or edit your church's custom reports, click 'edit custom reports' to the right. For more information on our custom reports, click here.

Media

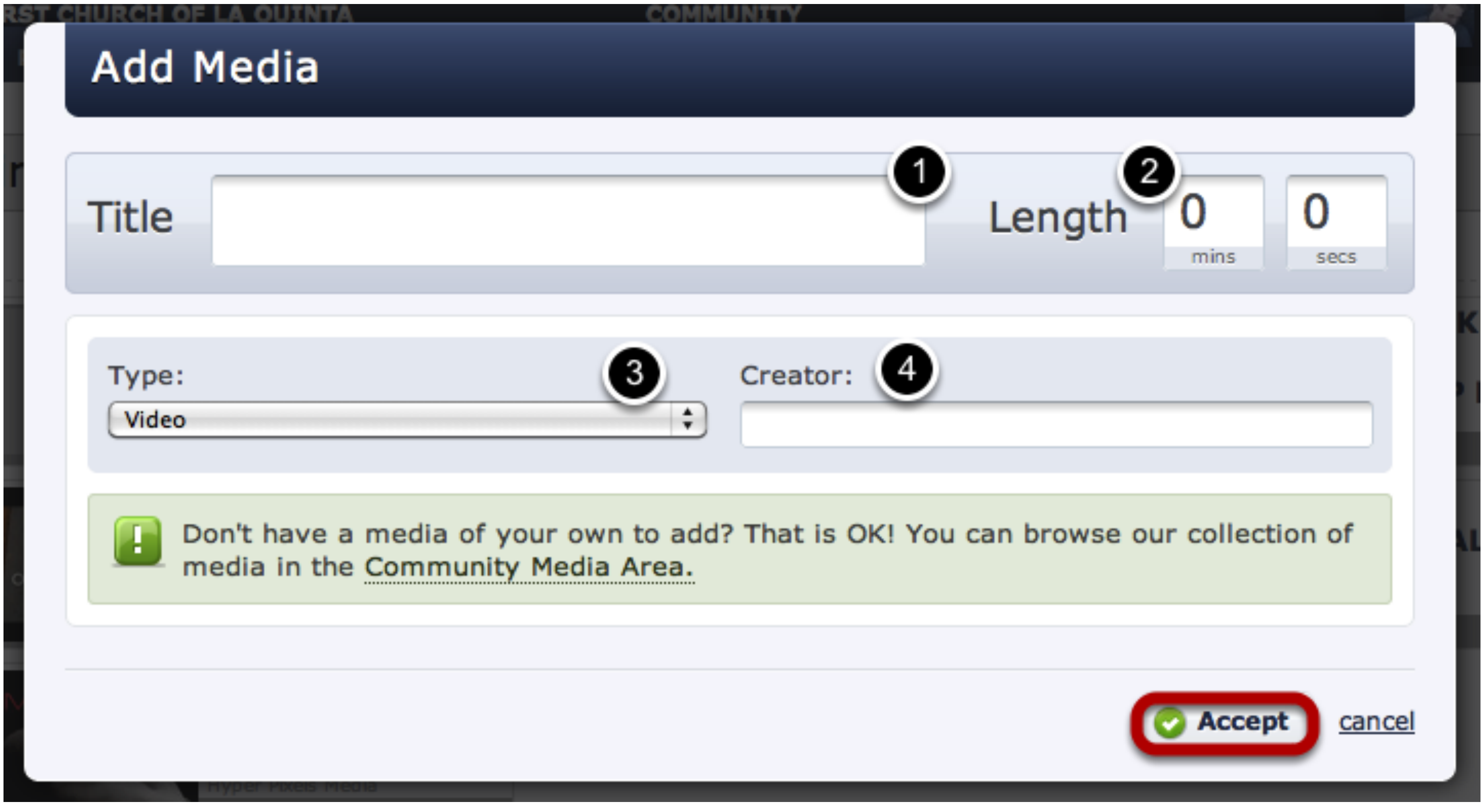
Adding and Uploading Media

Click on the media tab

To add Media, click the 'add media' link in the upper right



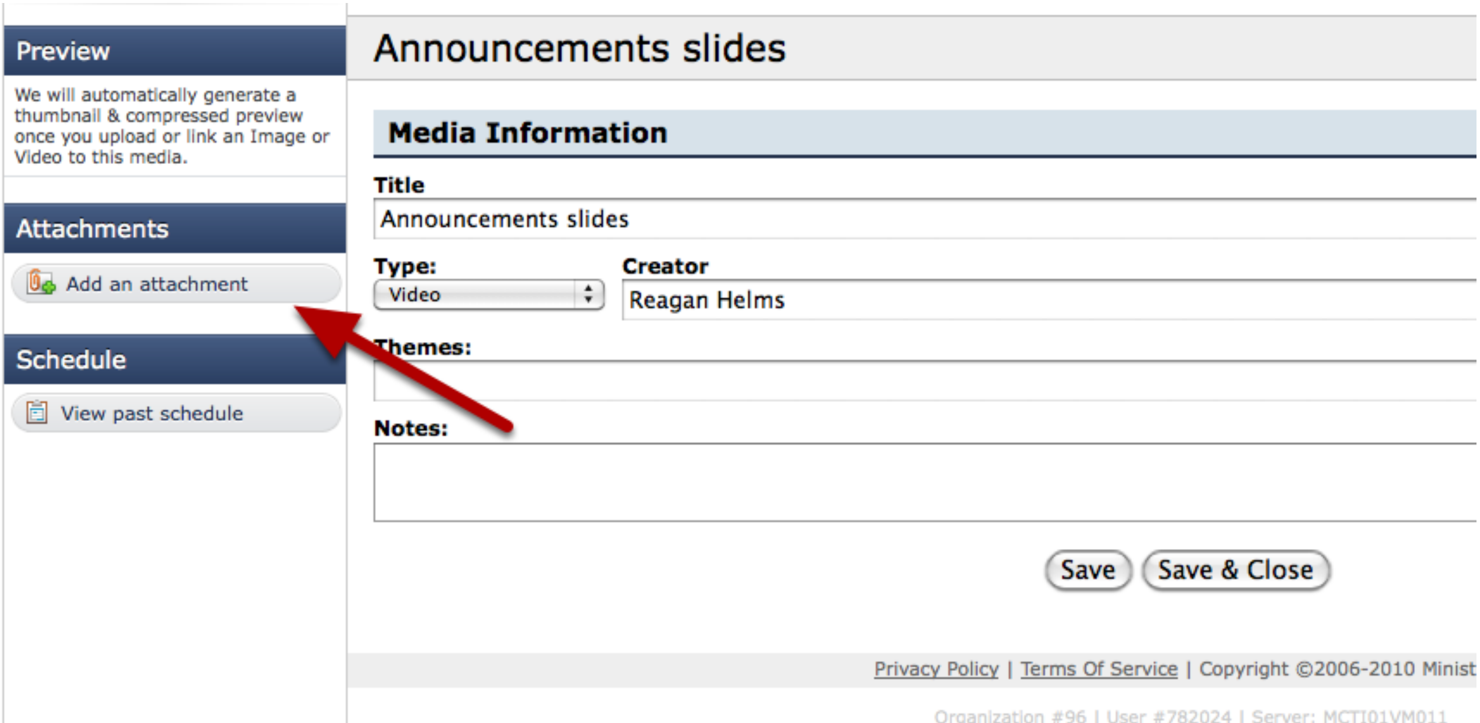
Enter Media information.



1. Enter the title of this media.
2. Enter the length of minutes this media is for.
3. Choose the type of media this is. At this time, these are the only options, but if you need one that is not there, please email us and let us know so we can add it to our suggestion list (support@ministrycentered.com).
4. Enter the creator of this media.

When you are done with this information, click 'accept'.

Your Media is added.

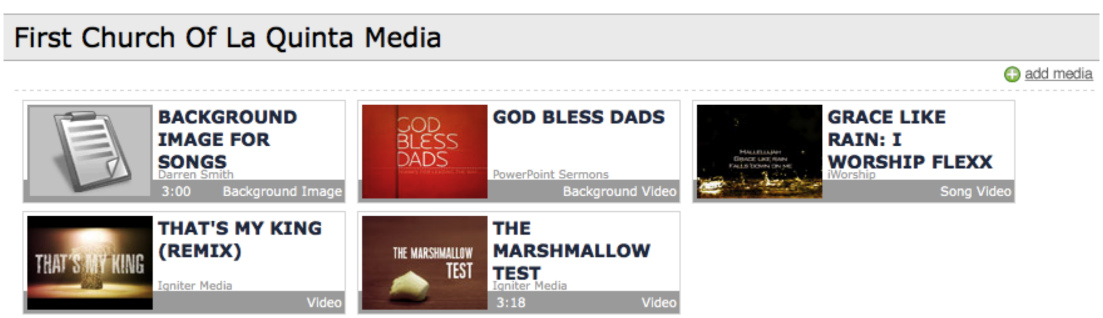


This pages looks very much like a song in the Songs page. It contains all your information, gives you a place for Themes, Notes, and Custom Properties, and allows you to upload attachments.

In the top left corner area you can click 'Add an attachment', which will allow you to upload, or link to an attachment or pull a video from Youtube. As it says under "Preview", once you upload a media, it will automatically generate a thumbnail and compressed preview for you.

Learn the different methods for Adding Attachments here

Example of Media Page:



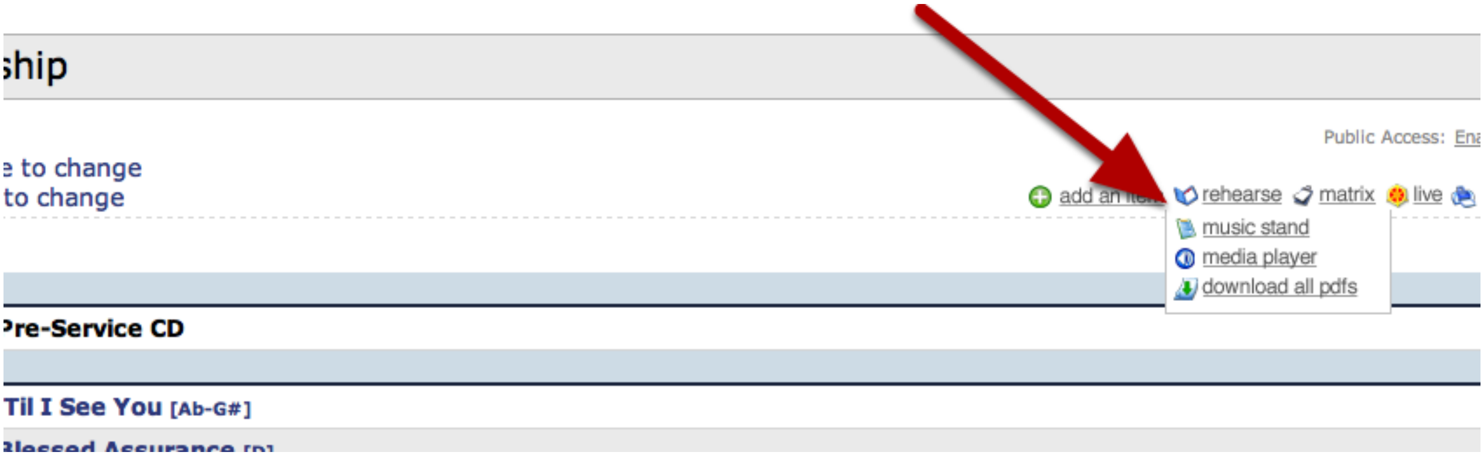
Above is an example of what your media page might look like. I have many different medias, all (except my most recent) with a thumbnail attached.

Music Stand

Using the web-based version.

This lesson shows you how to use the web-based version of Music Stand, from within a plan.

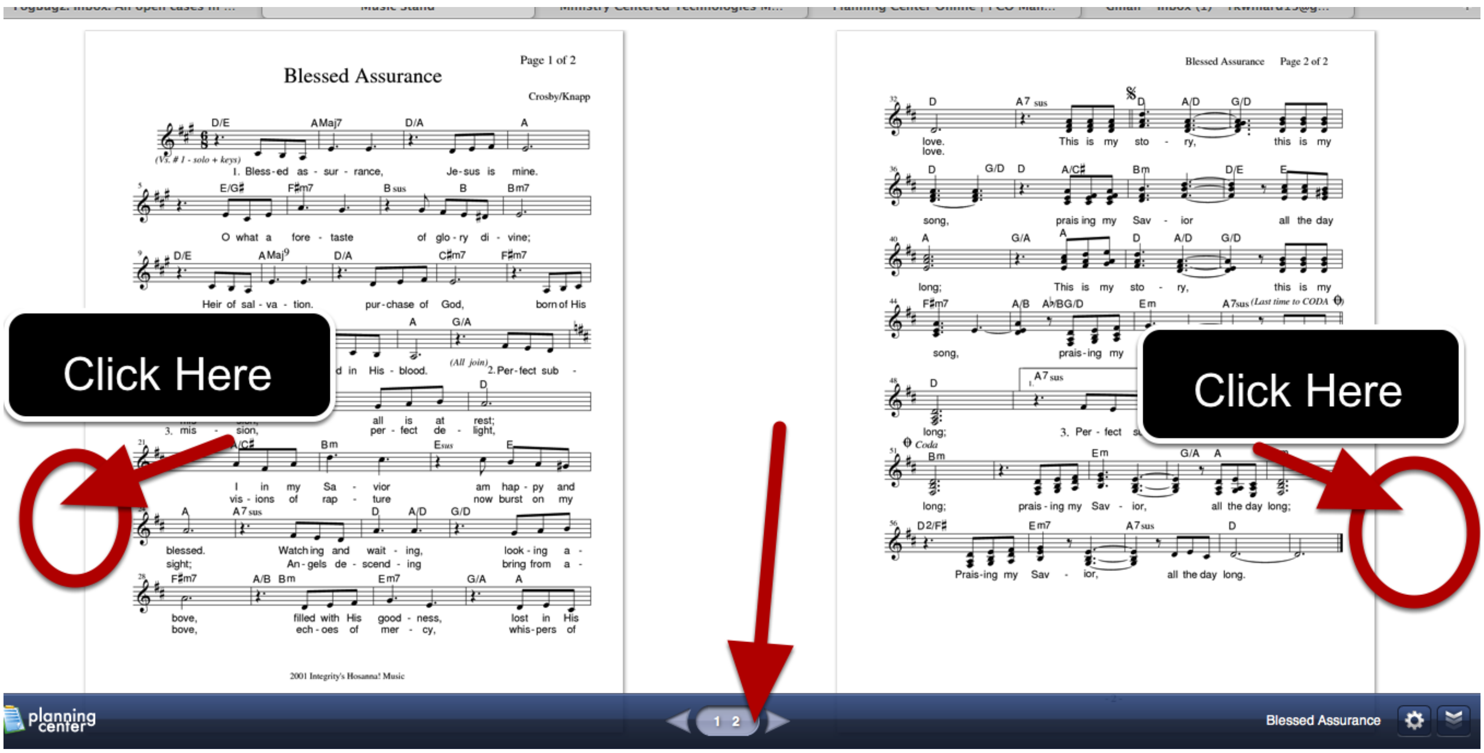
Hover over Rehearse and click Music Stand.



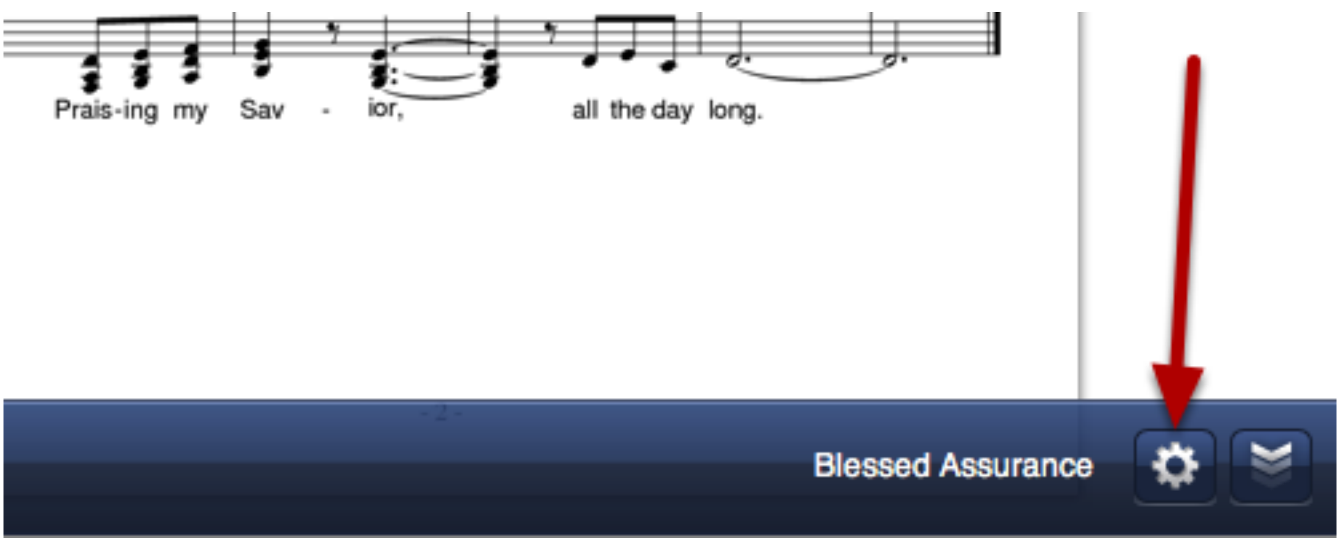
Once you are inside of the plan, go to the top right corner and hover over Rehearse, then click music stand.

Your PDF's will be loaded. This may take a minute depending on how many PDF's you have and the size of each file.

To turn the page back or forward, click on either side of the page, as shown below. Or, click the arrows at the bottom.

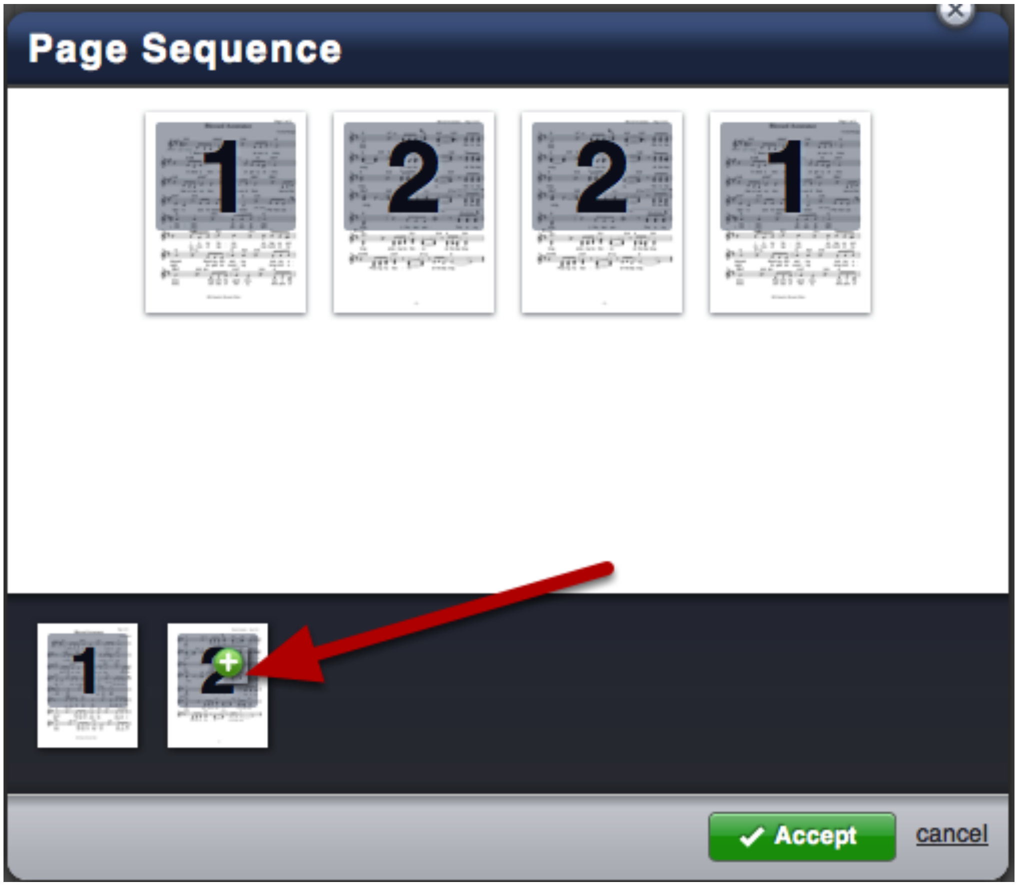


To rearrange pages or choose a different PDF, click the settings icon.



To rearrange your pages or add pages, click the rearrange pages button for that PDF.

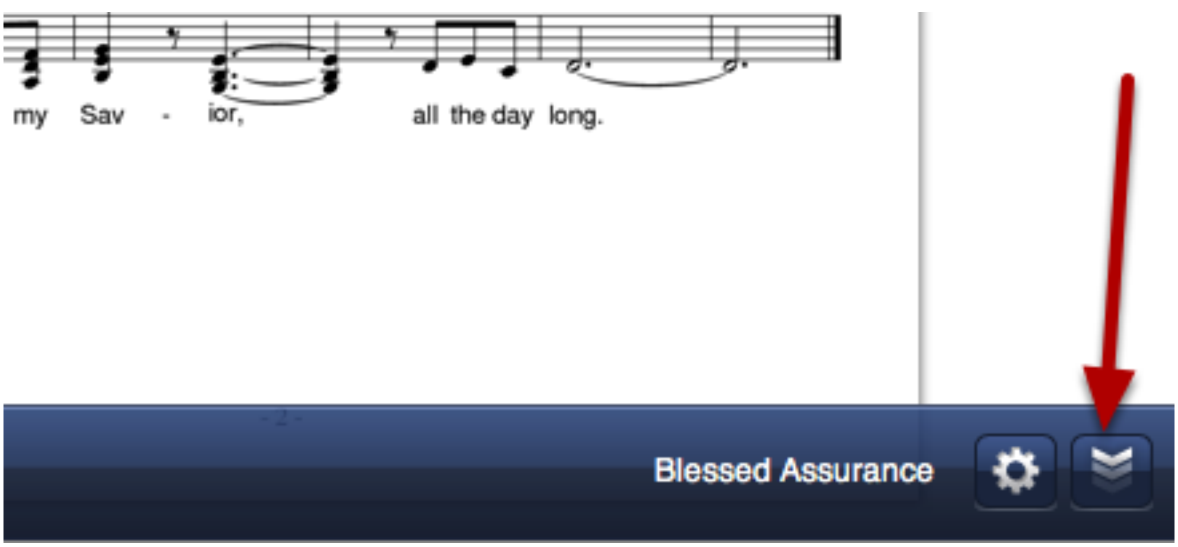
To add more of the same pages to your sequence, hover over that page along the bottom and click the green "+" that comes up. This adds it to your sequence and you can drag and drop your pages to rearrange.



To delete a page from your sequence hover over it and a red "X" will appear in the top right corner of that page. Click Accept when you are finished rearranging pages.

To select a different PDF for that song, click the arrow next to it and select from the drop-down.

To close the blue options bar, click the arrows on the far right corner.

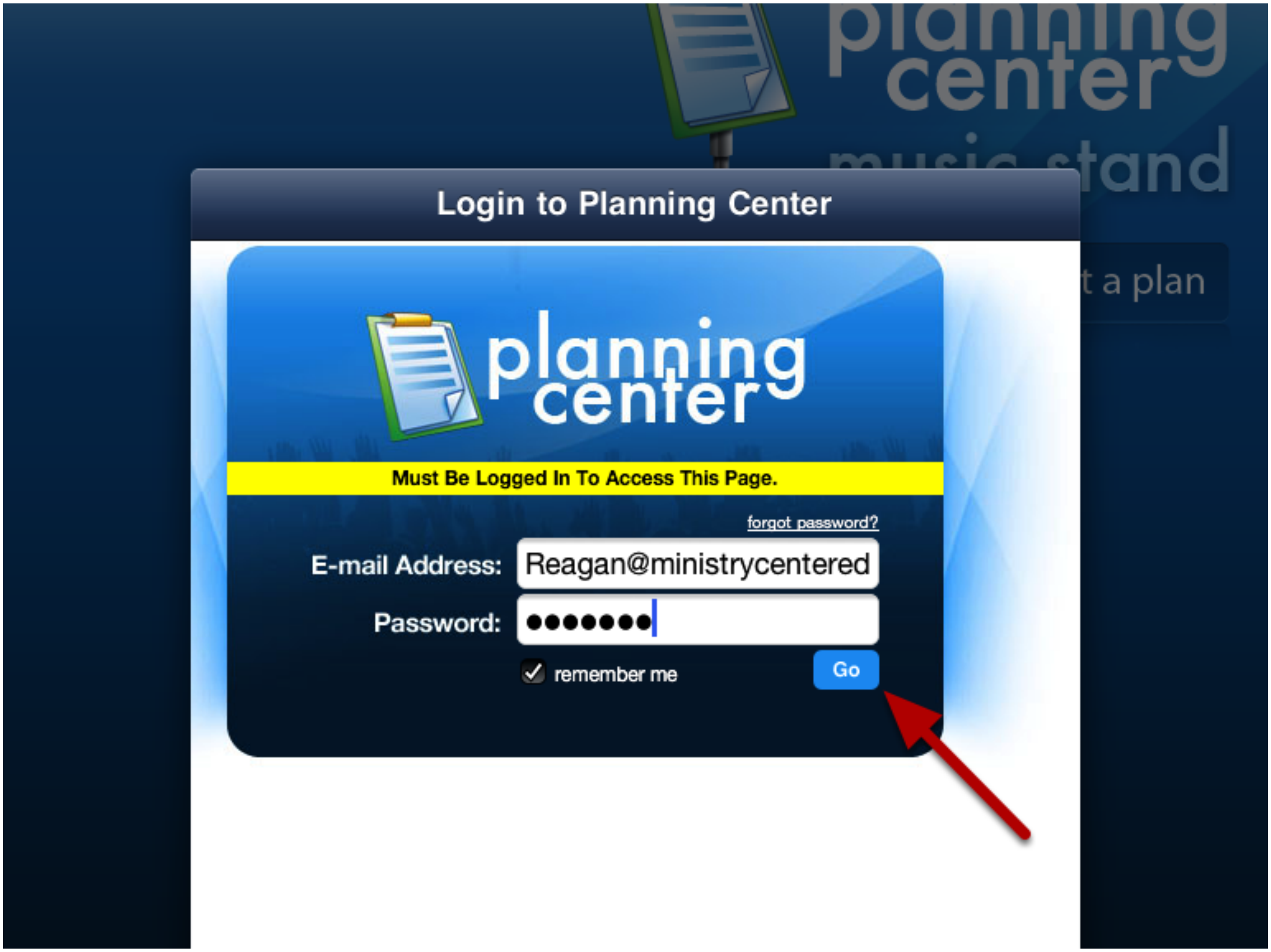


This will take away the blue bar across the bottom, as shown in the next picture.

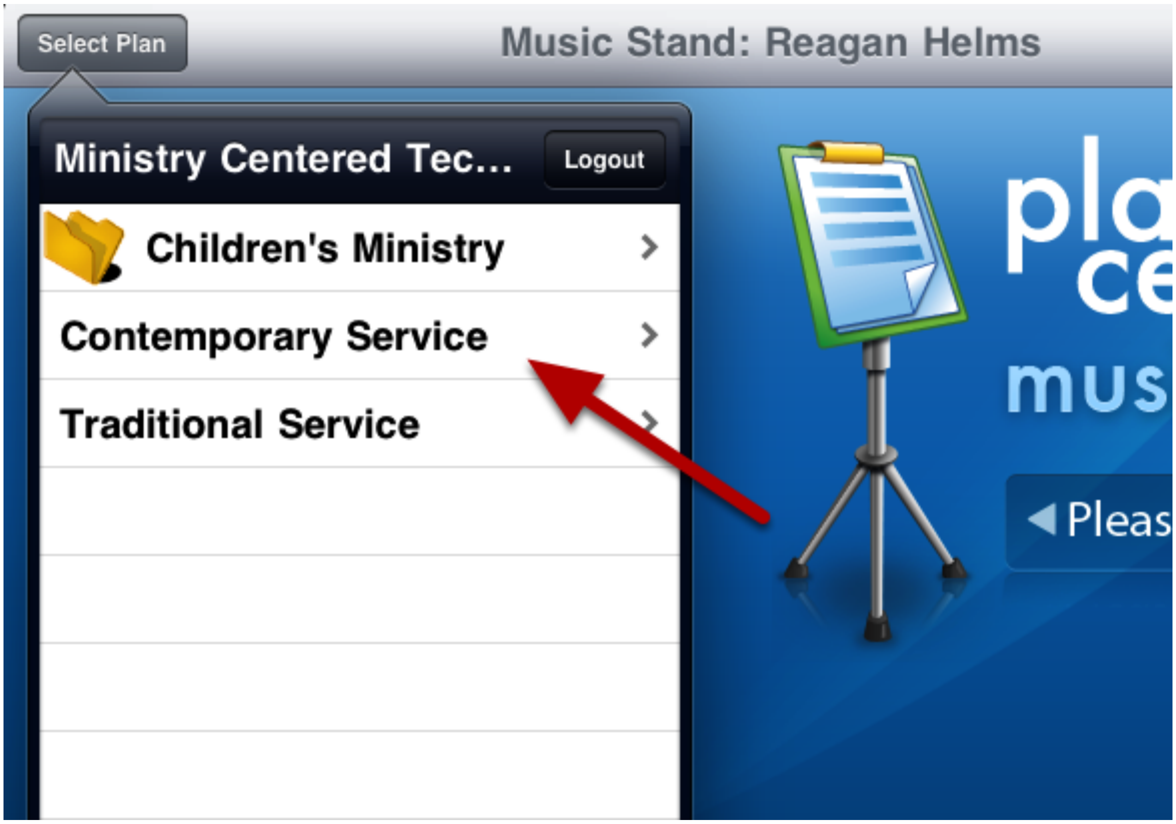
To bring back the blue options bar, click the PCO logo in the bottom right corner.

Locate and tap the Music Stand App

Enter in your username and password, then click 'Go'.

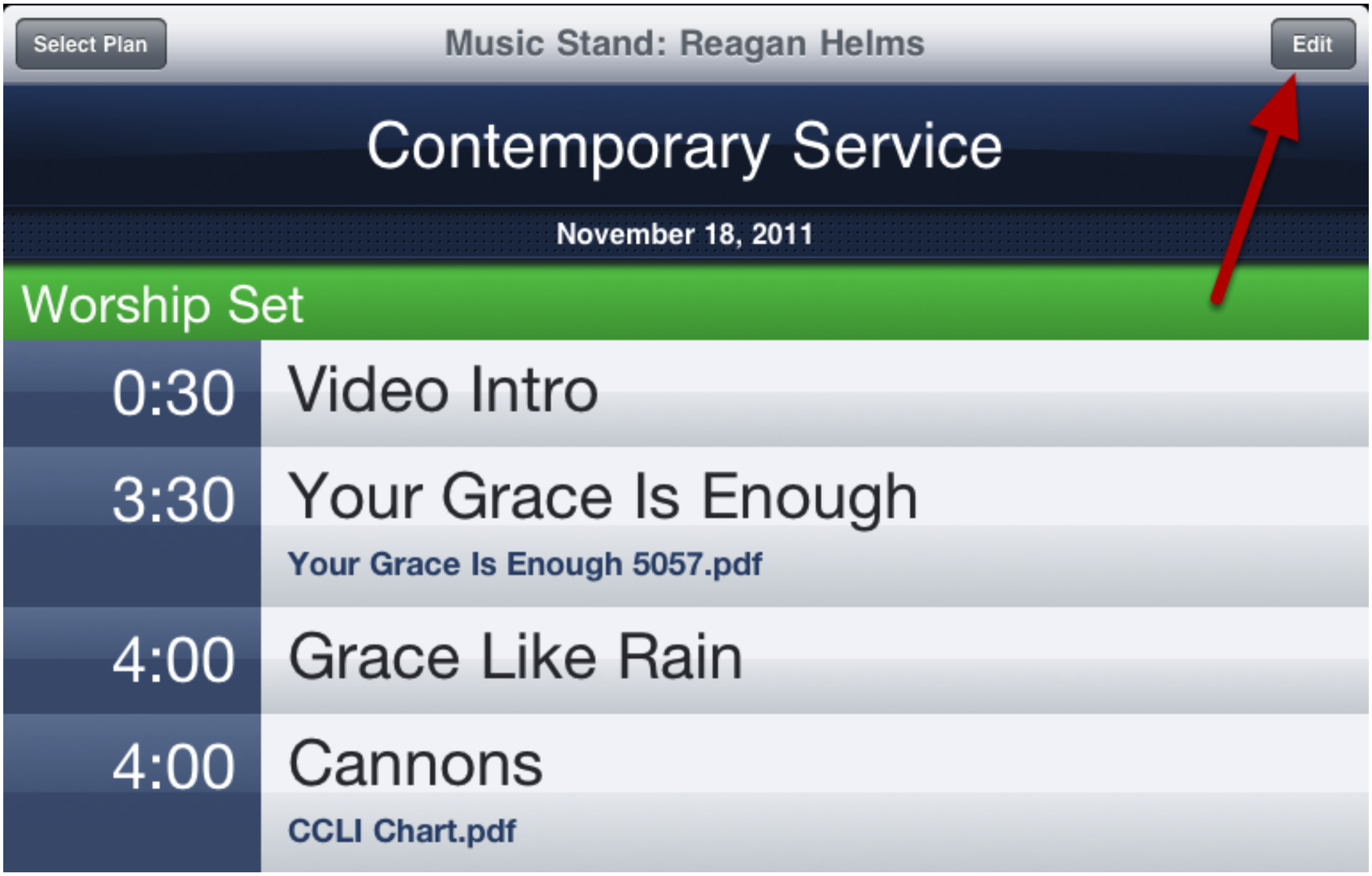


Select the service that contains the plan you would like to view.

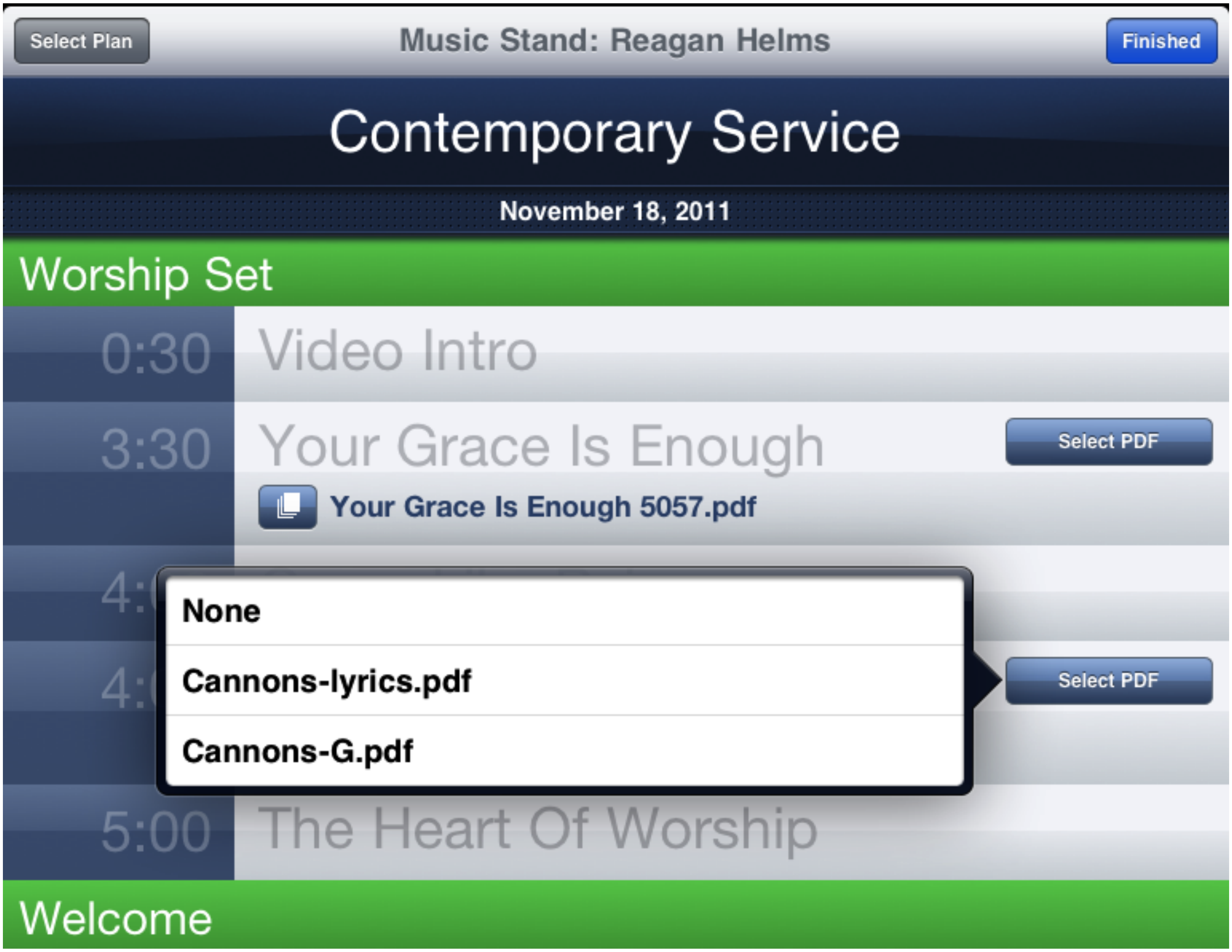


Then select the plan you would like to view.

To Select which pdf's you would like to view for each song, click the 'Edit' link.



Tap on 'Select PDF' to choose your pdf file.



Click the pages icon to select your page layout for that song.

Tapping on the song title will take you into the pdf that you have selected.

Cannons - Page 1

Cannons [G]

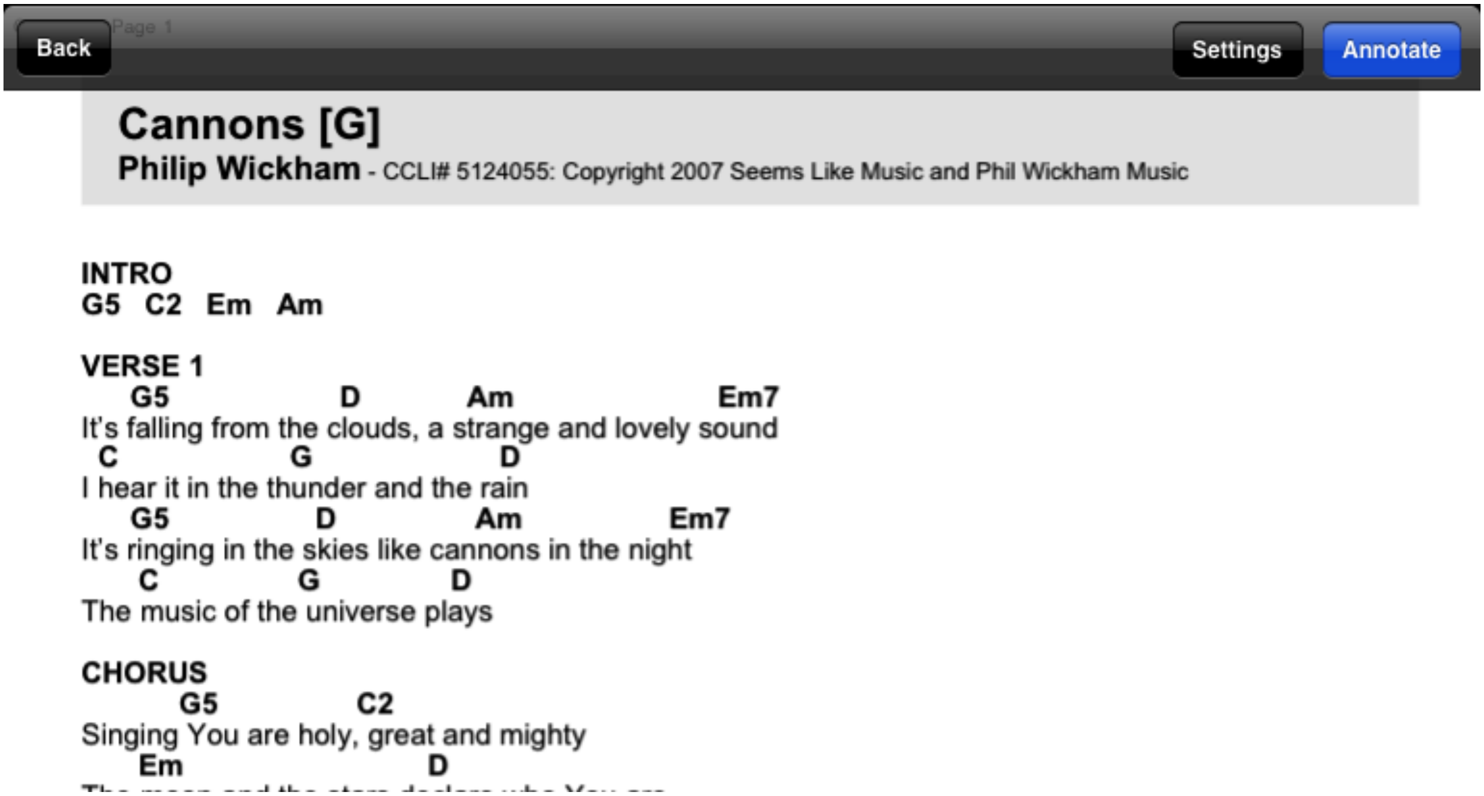
Philip Wickham - CCLI# 5124055: Copyright 2007 Seems Like Music and Phil Wickham Music

```
INTRO
G5  C2  Em  Am

VERSE 1
    G5               D         Am                  Em7
It's falling from the clouds, a strange and lovely sound
 C               G               D
I hear it in the thunder and the rain
    G5             D            Am             Em7
It's ringing in the skies like cannons in the night
     C           G            D
The music of the universe plays

CHORUS
        G5            C2
Singing You are holy, great and mighty
     Em                     D
The moon and the stars declare who You are
   G5                C2
I'm so unworthy, but still You love me
   Em                 D
Forever my heart will sing of how great You are

INTRO

VERSE 2
G5              D         Am           Em7
Beautiful and free, the song of galaxies
     C             G                  D
It's reaching far beyond the Milky Way
     G5                D          Am                 Em7
Let's join in with the sound, c'mon let's sing it loud
        C              G          D
As the music of the universe plays

CHORUS

BRIDGE
    C2                    G         D
All glory, honor, power is Yours, Amen
    C2                    G         D
All glory, honor, power is Yours, Amen
    Am                     Em7            D
All glory, honor, power is Yours forever, Amen
```

Prepared For Reagan Helms of Ministry Centered Technologies (CCLI #1234) on 04/05/2011 at 11:52 AM 1

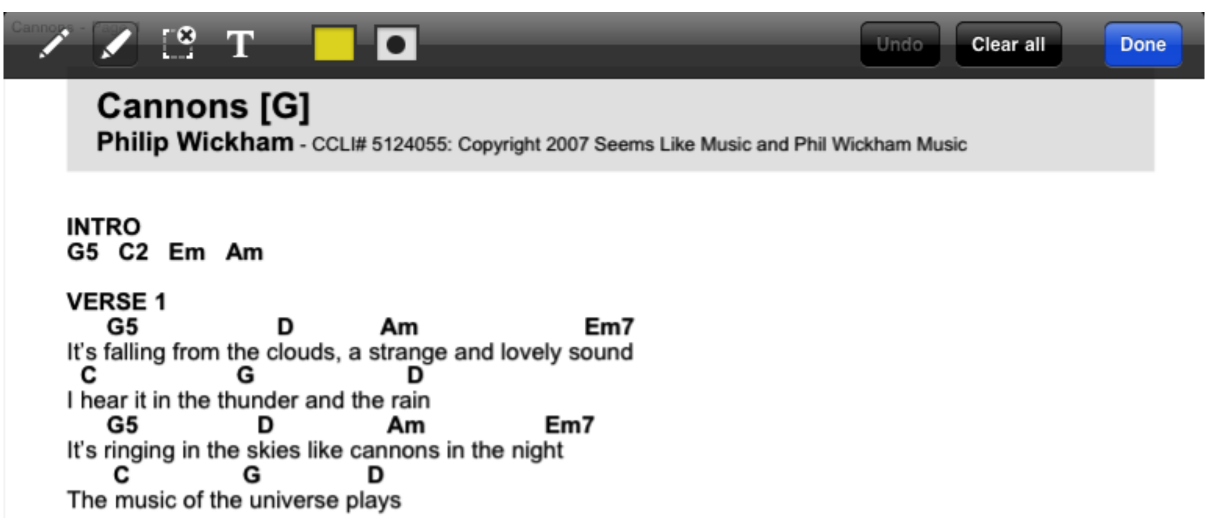
Swipe left and right to page through your pdf's.

To pull up the options bar, tap the screen.



Tap on the blue 'Annotate' button to make notes on this pdf.
Tap on 'Settings' to set up your foot switch options
Tap on 'Back' to exit out of this pdf and go back to the plan view

Tap on 'Annotate' to make notes...



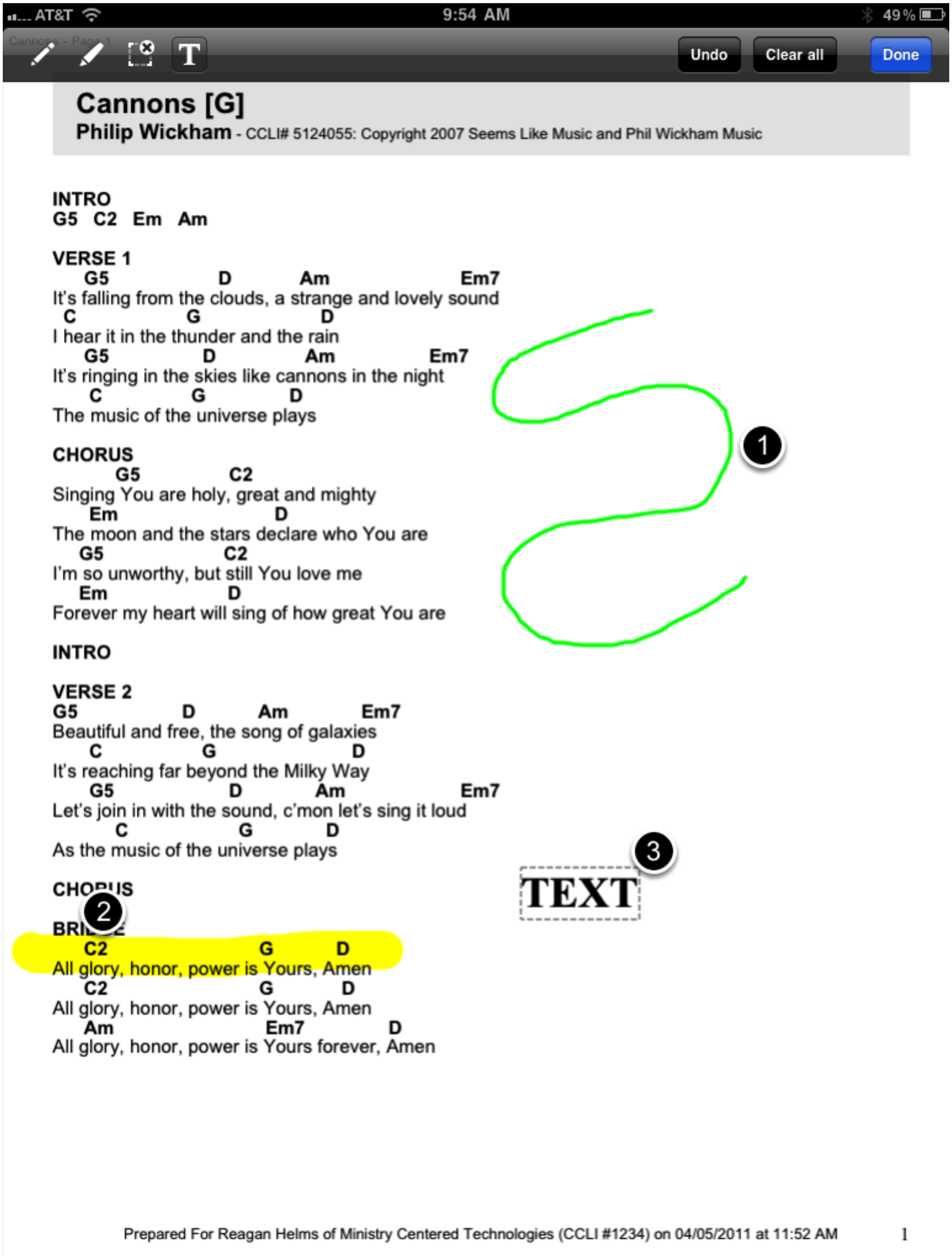
From left to right...
-The pencil tool allows you to write solid lines on your pdf
-The highlighter tool allows you to write a see-through line over an area of your pdf

-The eraser tool allows you to drag and release a box that will erase all notations inside of it (excluding text).
-The text too will allow you create a text field that you can drag and drop on your pdf. To remove or edit a text area, tap it.
-The color and size tools will appear if you have selected the pencil or the highlighter tools.

Tap on the 'Undo' button to undo your last action.
Tap 'Clear all' to remove all of your annotations.

When you are finished annotating, click 'Done'.

Here are samples of the various tools.

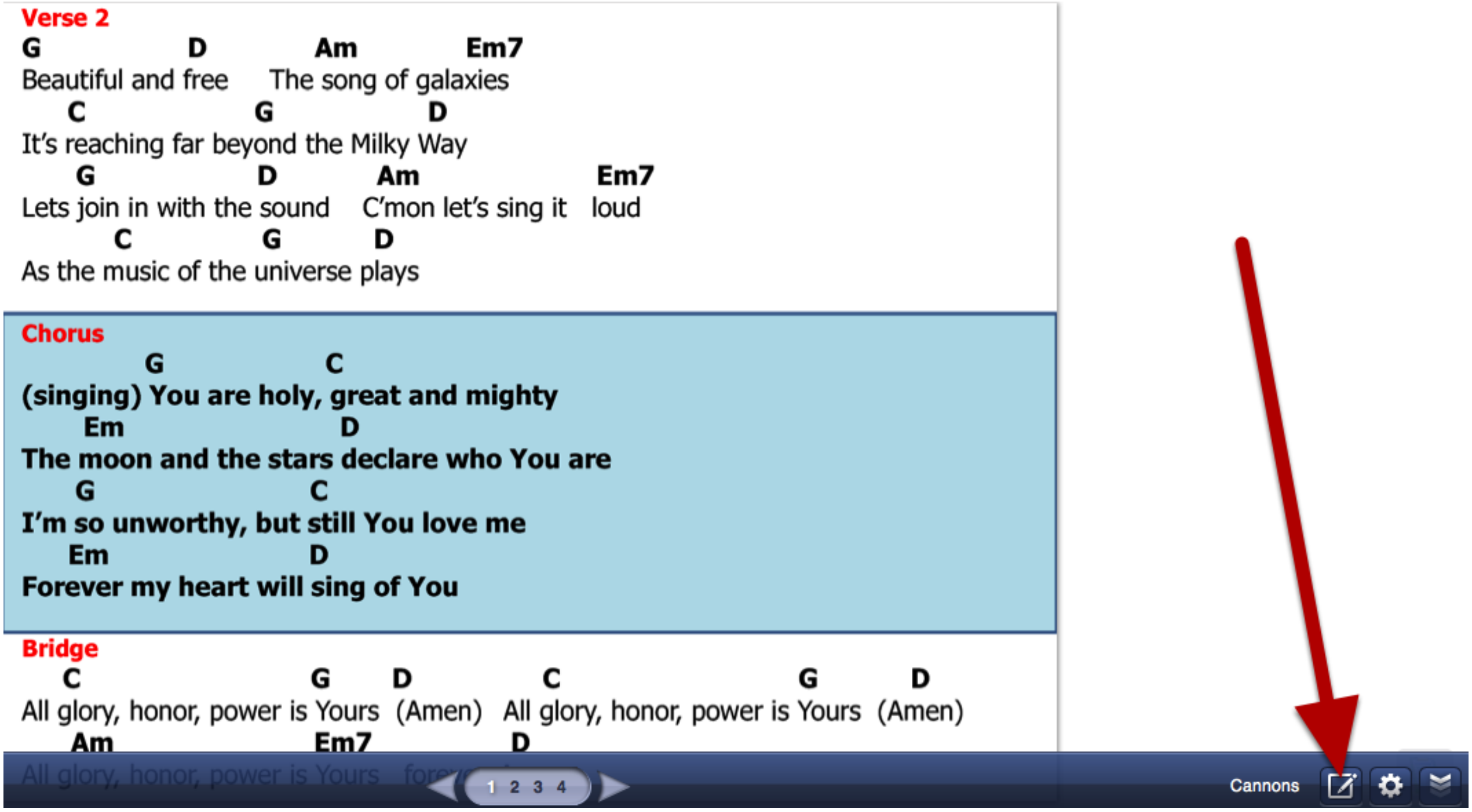


1-Pencil
2-Highlighter
3-Text

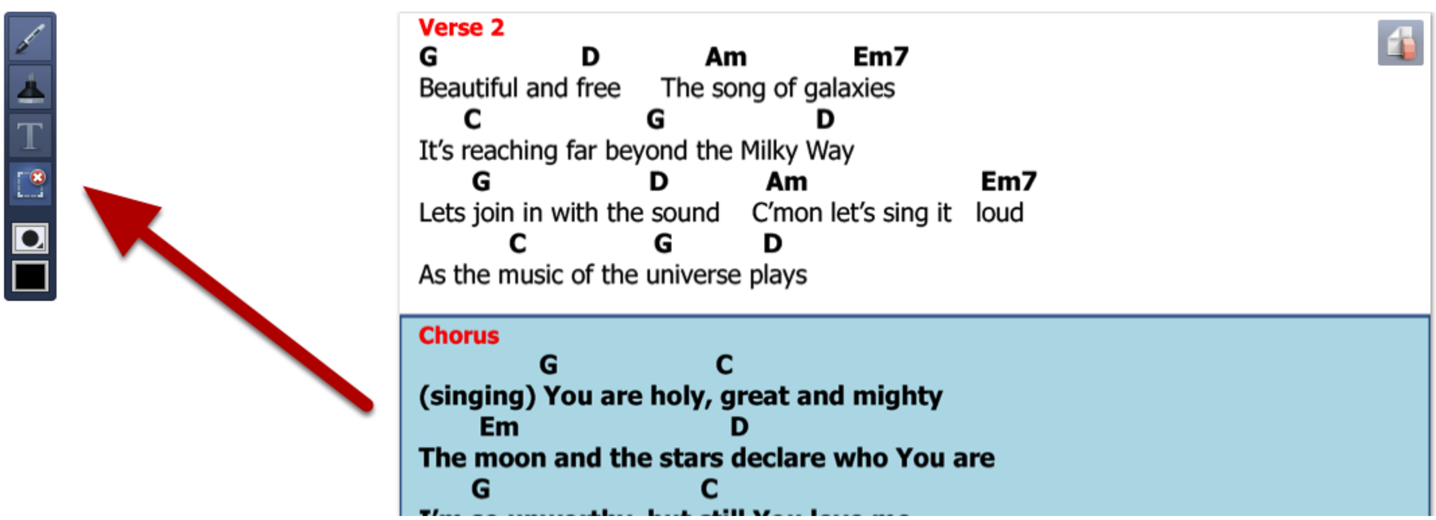
Annotations in Music Stand

This lesson will walk you through how to use the annotations feature in Music Stand.

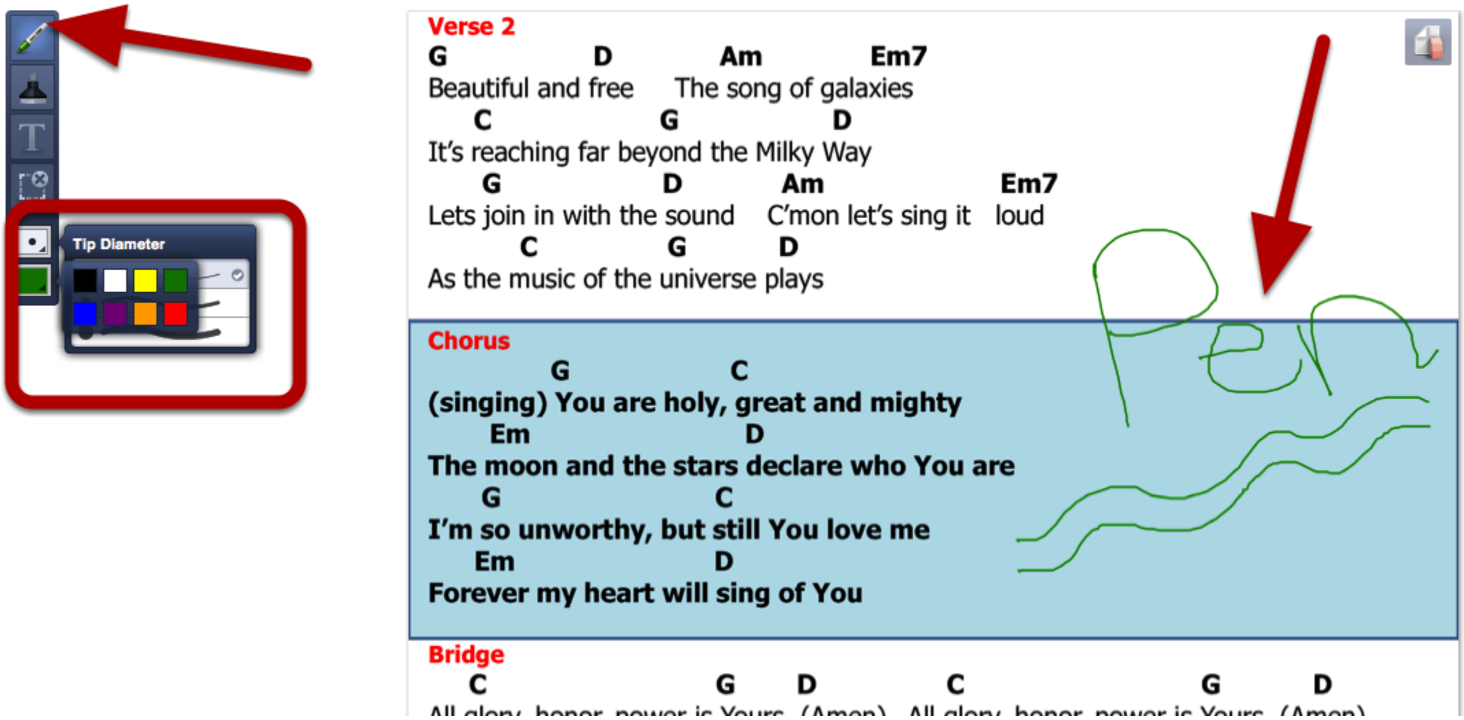
Once Music Stand is loaded, click the pad and pen icon in the bottom right corner.



This will open up your options on the left.

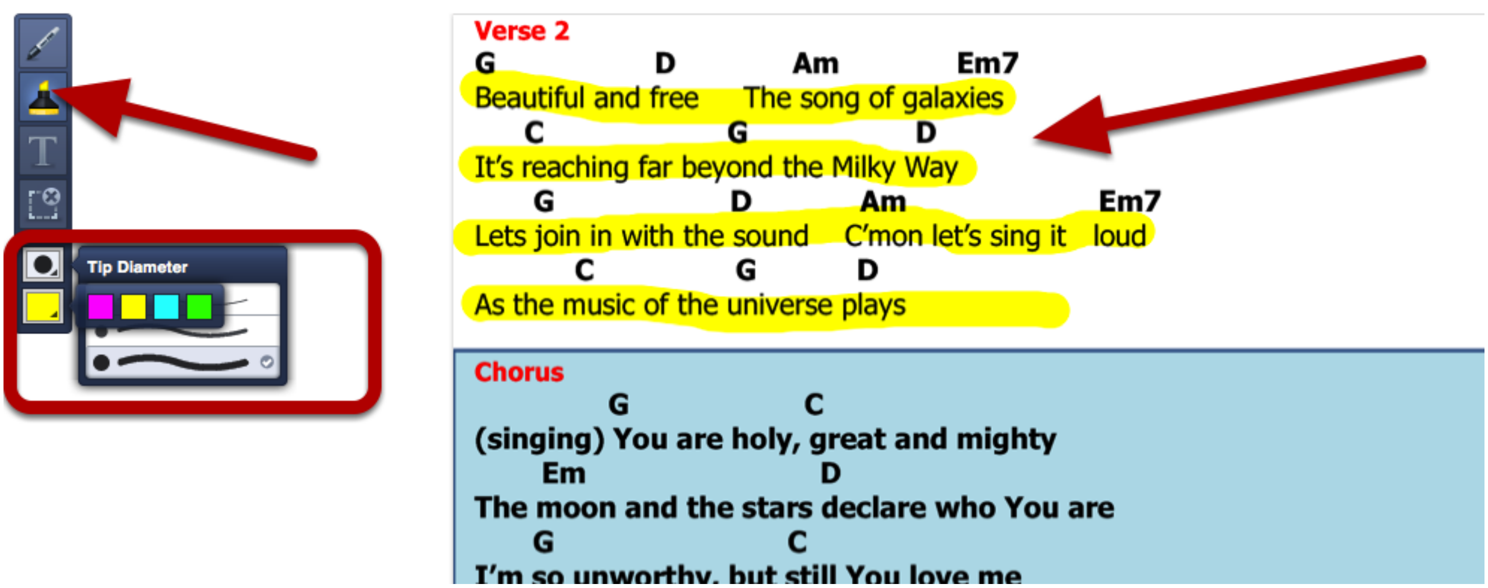


To write with a pen, click the first pen symbol.



Once you've clicked on the first pen symbol you can use the bottom 2 symbols to specify the diameter of the stroke, and then the color (as seen above). Then, write with your pen. Example shown above.

To use the highlighter, click the second symbol.

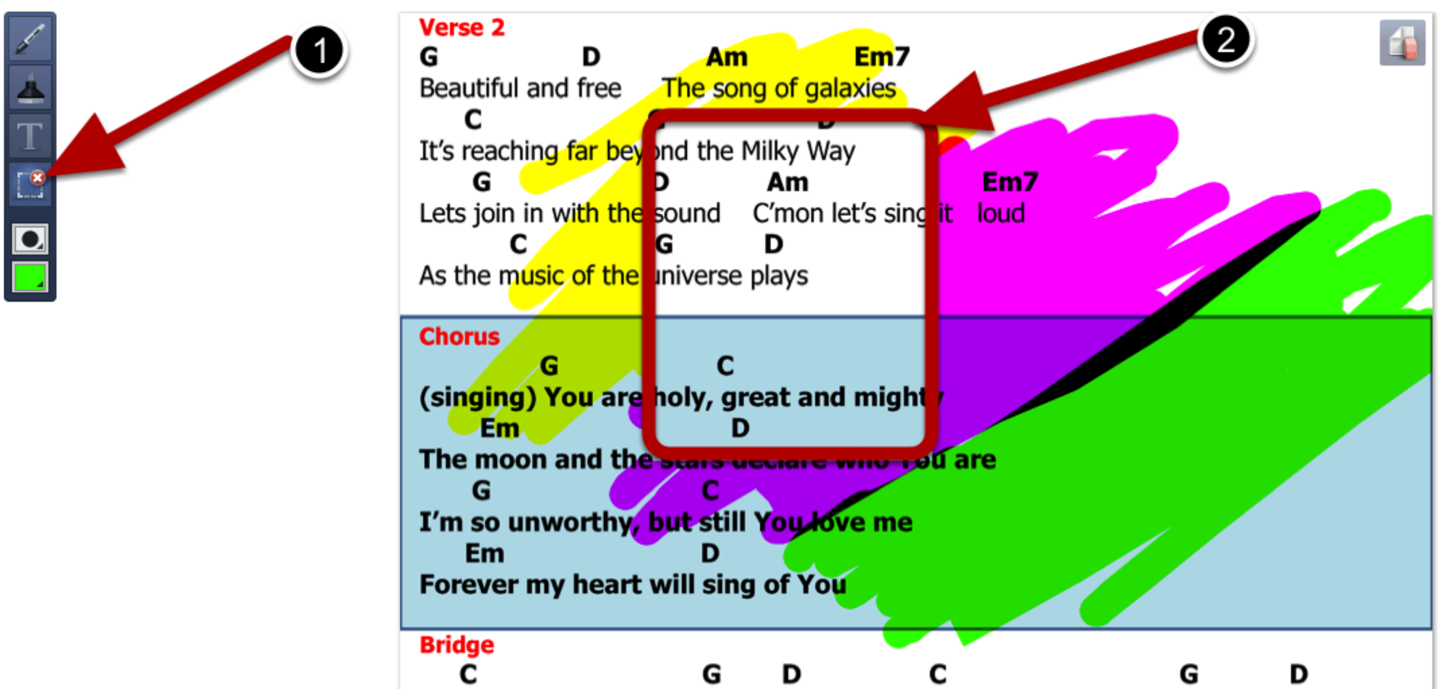


Once you've clicked on the higlighter, you can use the bottom 2 symbols to specify the diameter of the highlighter stroke, and the color (as seen above). Example of higlighter shown above.

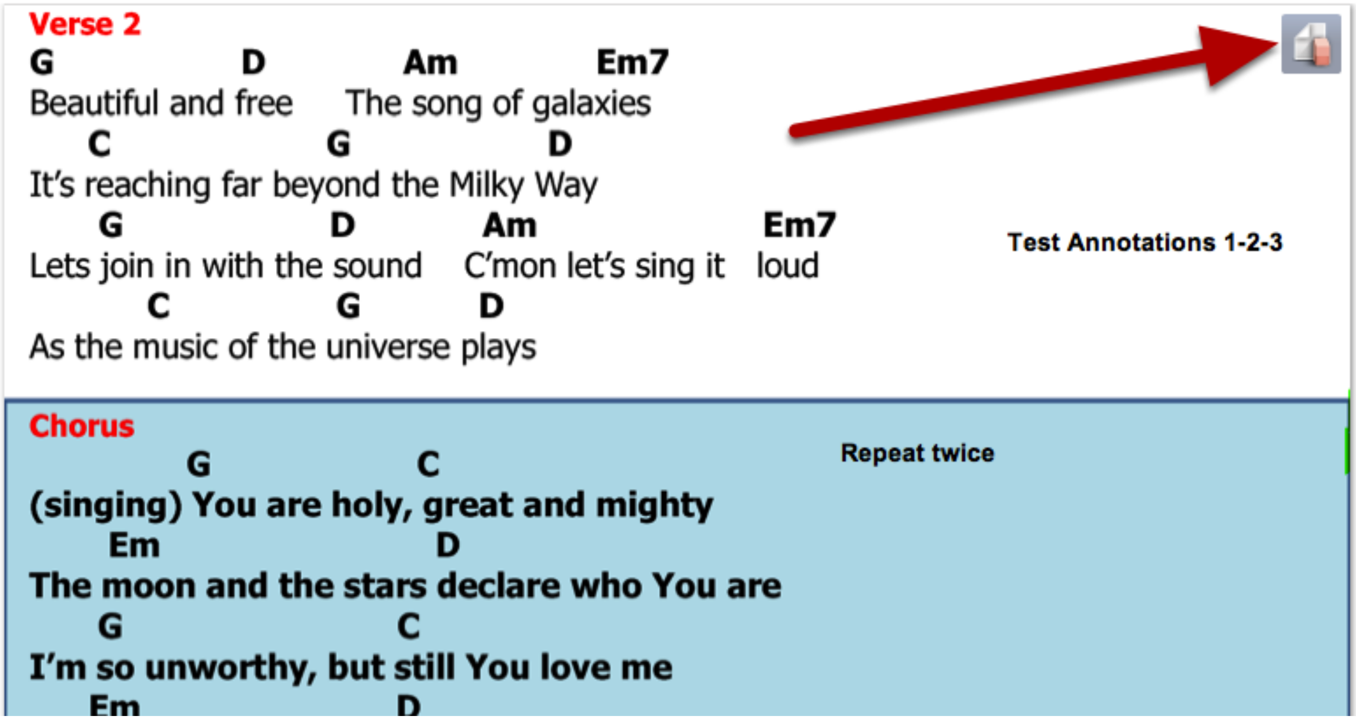
To type text as notes into your PDF, click the third symbol for Text.

After you click the symbol for Text, click anywhere on the screen that you want your text to go. A box as shown above will come up. Type your text, and choose the font and font size you'd like. Click accept when finished and your font will be included exactly where you clicked.

To delete what you have drawn with the pen or highlighter, click the rectangular delete button. Then pull the rectangle around the area to delete.

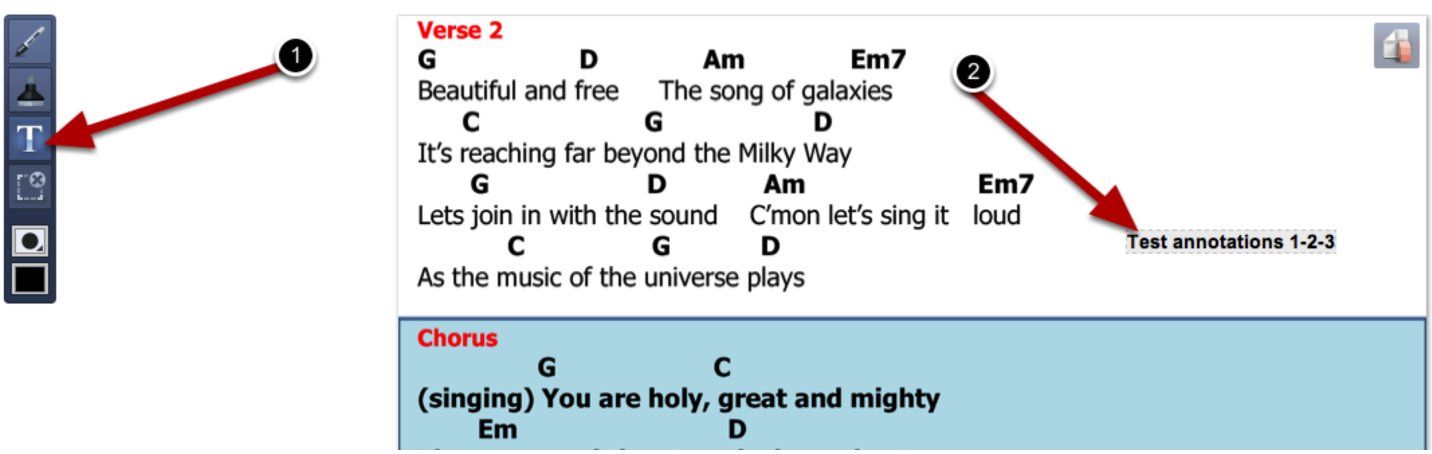


To delete any text you've written, click the Clear Annotations button in the top right corner.



This will delete anything you have annotated on this page.

To edit any text annotations you've made, first make sure the Text symbol is clicked, then click on the actual text to edit.



This is also how you would delete this text. Just click, delete what's there, and click Accept.

iPad App

The Planning Center Music Stand app will run on any iPad. To load your chart initially, you need access to the internet, but once they are loaded in memory, the charts for the last 10 plans you have viewed in the app stay in memory. This means that if your church doesn't have internet access on stage, you can still load your iPads from another location, and then use them on stage.

Mic Clip for iPad 1

The "X-Clip" for the iPad 1 is now available! Visit www.criskenna.com to get more information on this clip and to order yours today! The xClip has been tested with the iPad 2 and though it is a little looser, is still fully functional. To compensate for the looseness, it will be shipped with some easily installable inserts.

Airtun Foot Pedal

There are 2 bluetooth foot pedals that we recommend. The first is a transmitter than can be hooked up to any footswitch and can be purchased from Airturn. It works right out of the box and can be used with existing pedals or with pedals you can purchase from their site. Guitar players who already have pedals mounted to their pedal boards can just hook them up to the Airturn.

PageFlip Cicada Foot Pedal

PageFlip Cicada
Bluetooth Pedal

The Cicada by PageFlip is another great option. The Cicada is an all-in-one unit with more physical switches. You can still plug in your own custom pedals, but since its pedals are already built-in, that would makes this option even larger. This pedal is much smaller than it looks in the pictures, but it still a little larger than the AirTurn. The physical on/off switch is a great feature as well as the 5 buttons to choose what keys are triggered by each pedal. Planning Center Music Stand works right out of the box using the up and down arrow options.

Additional Information

Any foot pedal that works like a USB or Bluetooth keyboard and doesn't require special software should work fine with Music Stand for iPad. Beginning with version 1.2.2, you can configure Music Stand for iPad to work with your pedal - just tap the "Settings" button next to the Annotations button in PDF mode. Once you set it, it will remember the settings the next time you use the app.

If you need to plug a USB keyboard or foot pedal into your iPad, you can use the USB to Dock connector included in Apple's iPad Camera Connector Kit, available for about $30 on their online store.

To connect a Bluetooth device, you need to enable Bluetooth and "pair" your device: this is found in Settings, under "General".

Troubleshooting: The iPad cannot recognize some keys from some input devices, such as "Page up" or "Page down", because they are not ordinary letters or numbers. To see what keys correspond to your pedals, you can open up the Notes app on your iPad, and start pressing pedals.

If your pedal is programmable, we recommend setting it to use the "f" and "b" keys for forward and back, respectively.

Personal Profiles

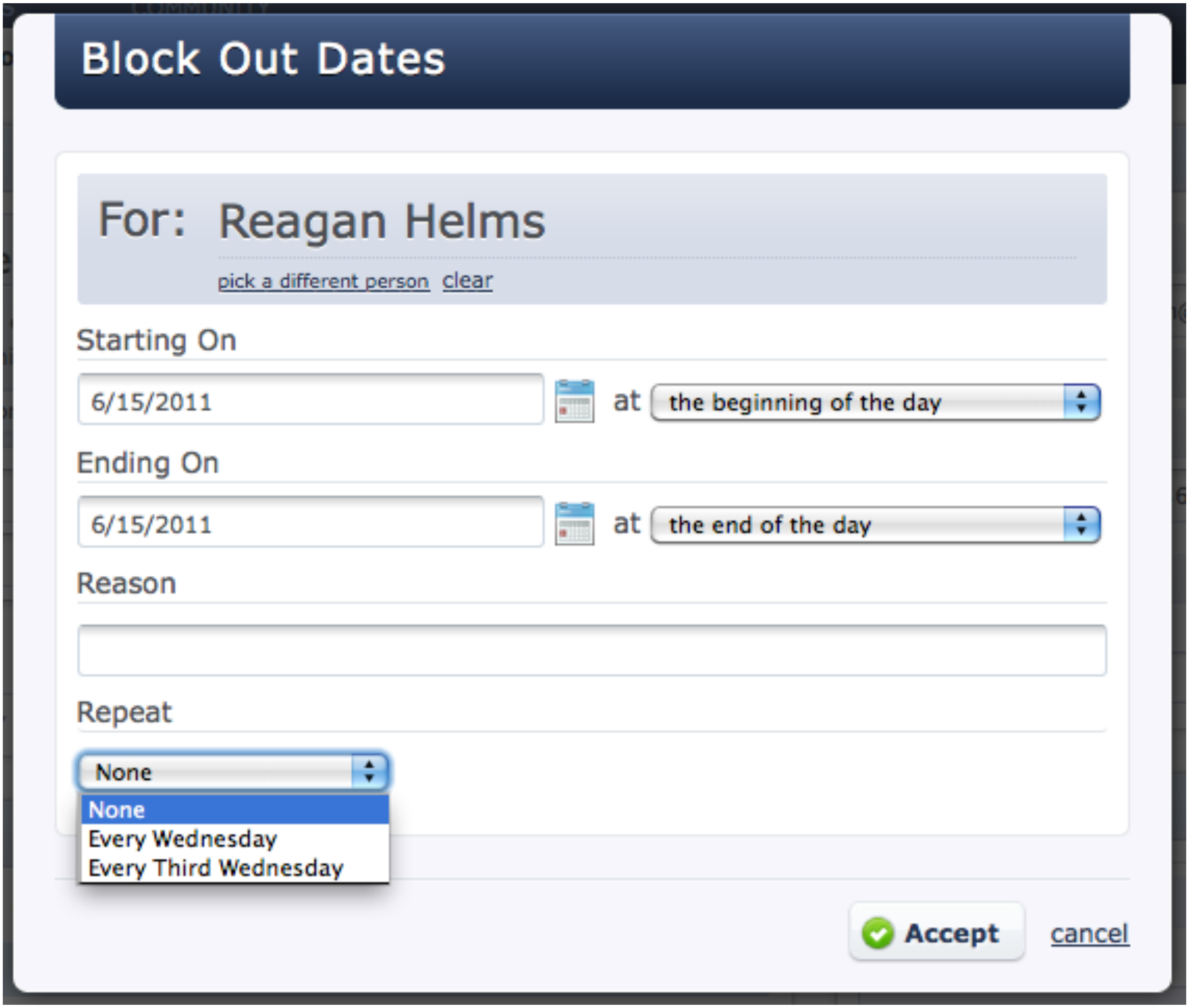
Block-Out Dates: Adding and Deleting

This lesson shows you how to add a block-out date to your profile. It also shows you how to delete that block-out date.

Click on your name

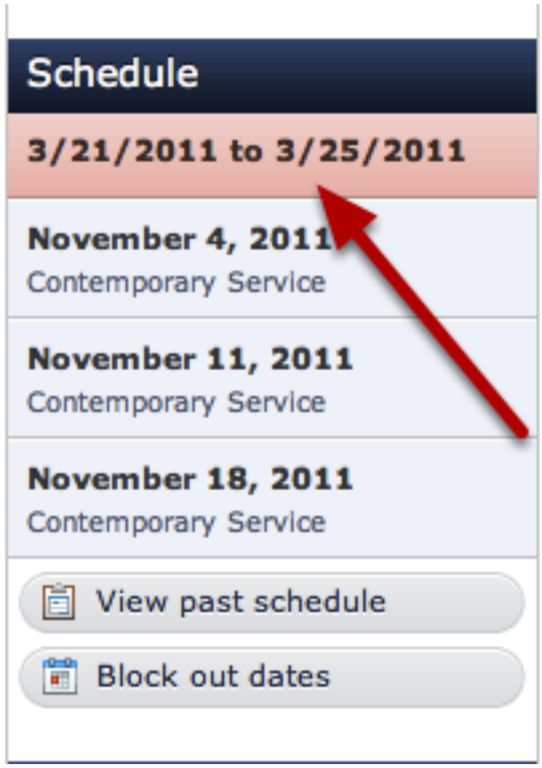
To add a date, click 'block-out dates'.

Indicate dates to block out.



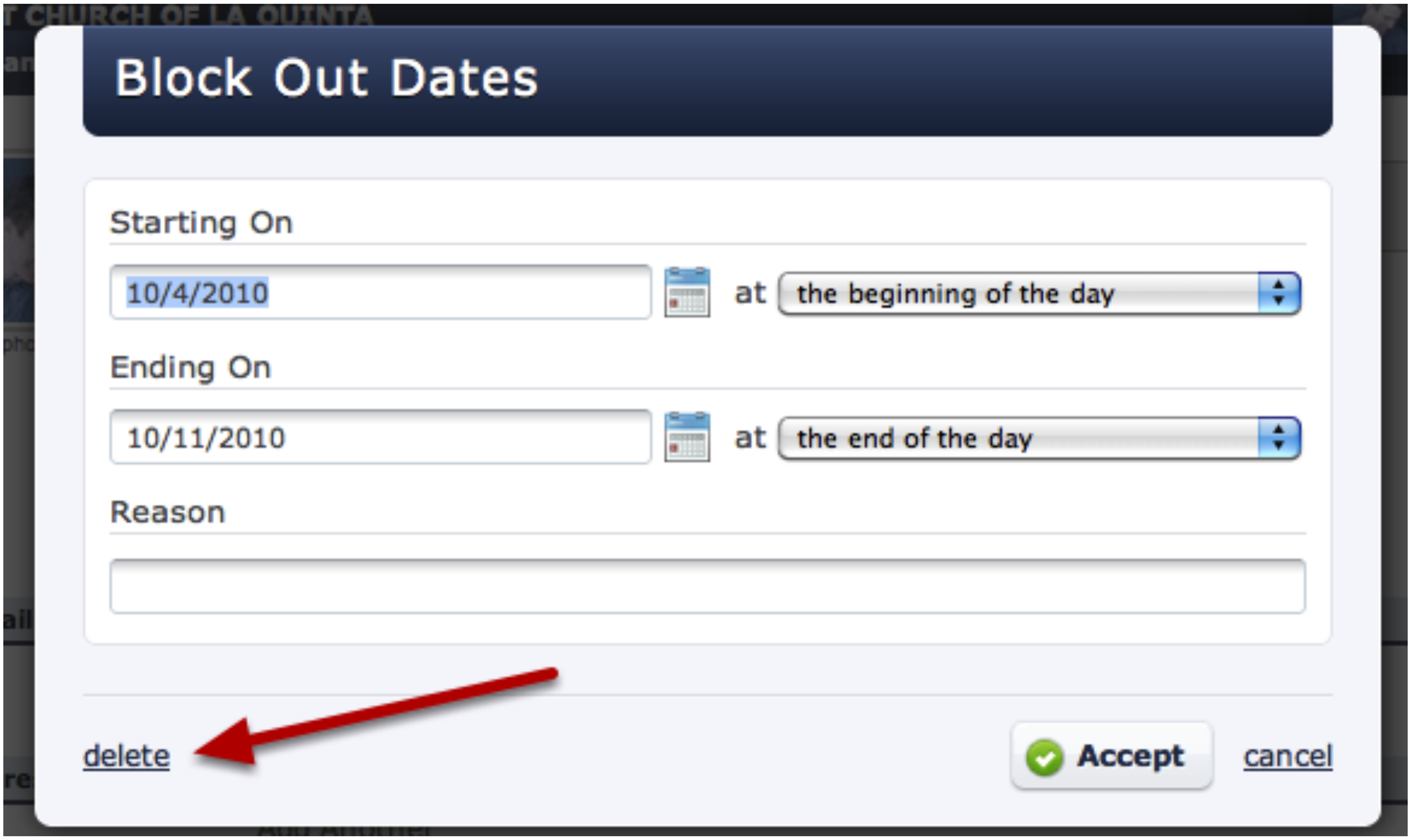
Indicate Starting On date and time, and Ending On date and time. If you prefer, add a reason.
If you would like this date to repeat, you can choose from the selected options. When finished, click Accept.

Block-Out date has been added.

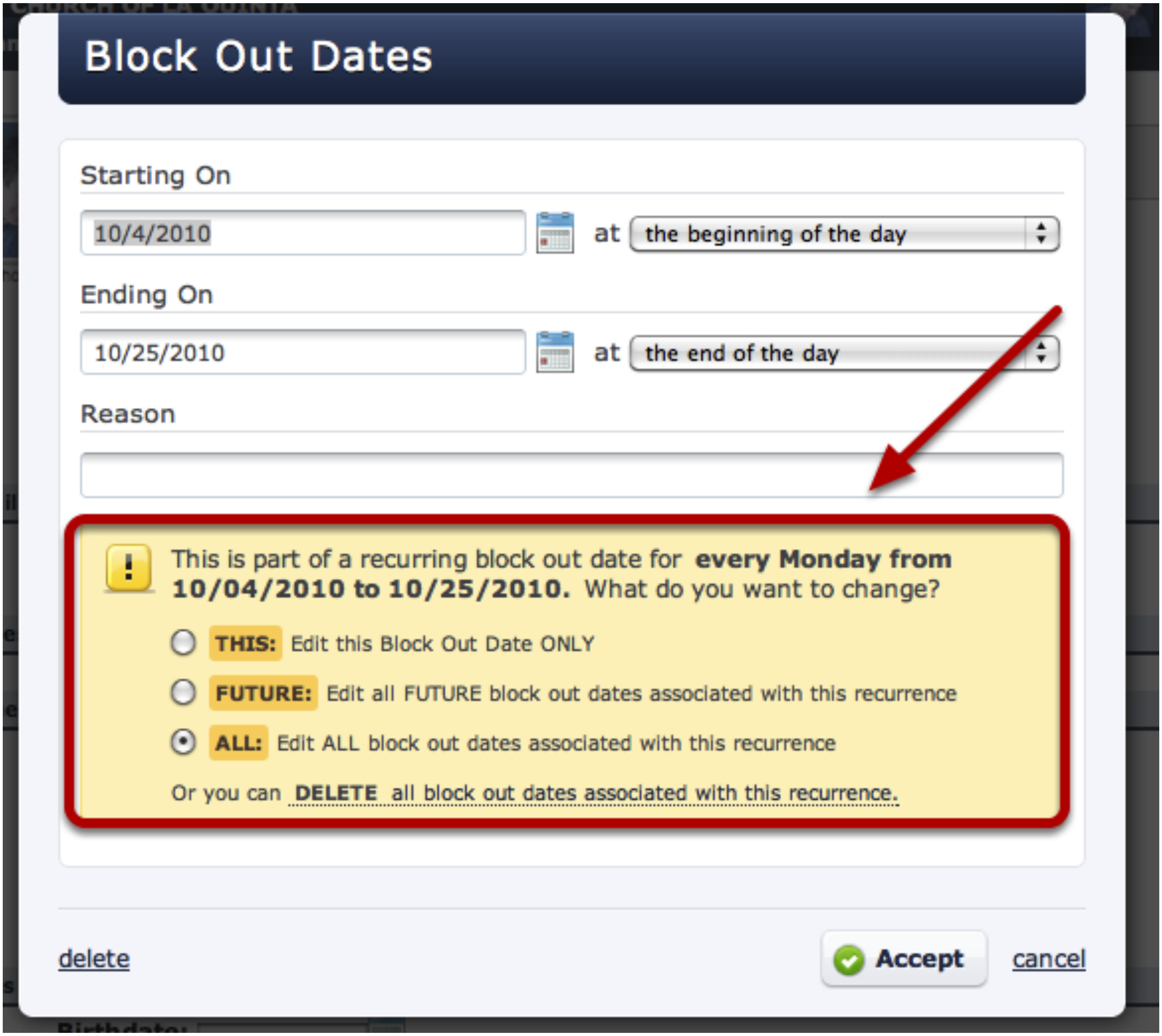


To delete a block-out date, click on the date(s).

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



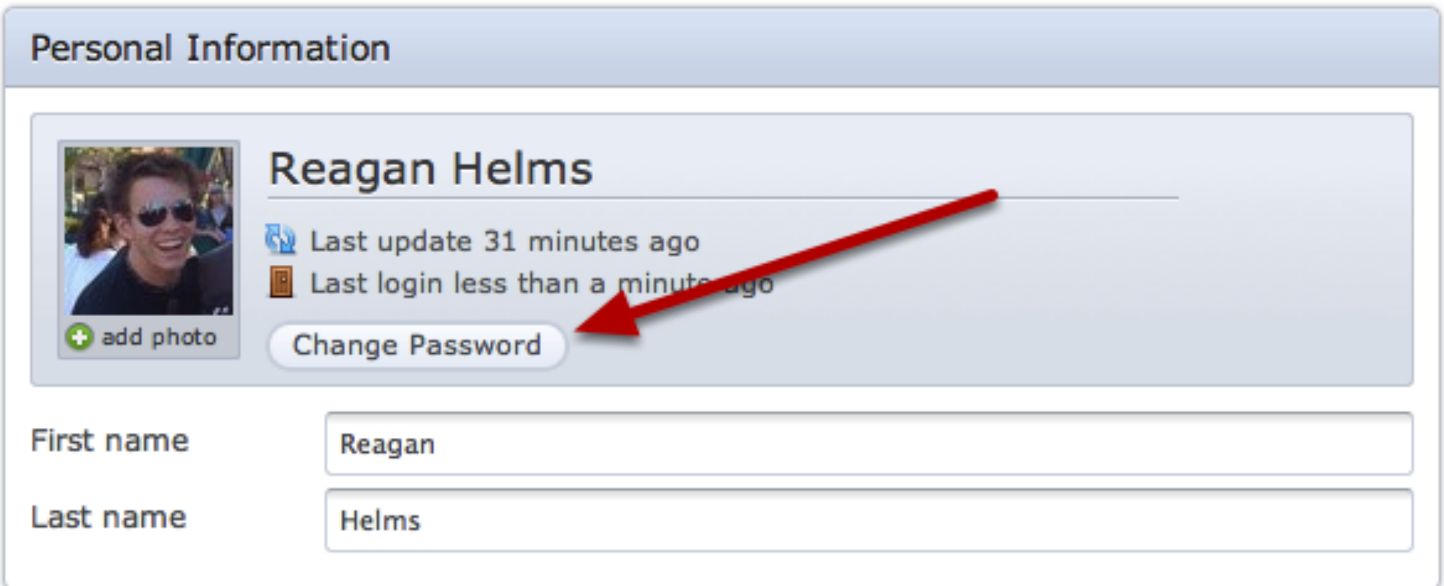
For repeating dates, select if you wish to only remove parts of the dates or the whole entry.



Changing Your Password

Click on your name in the upper right corner.

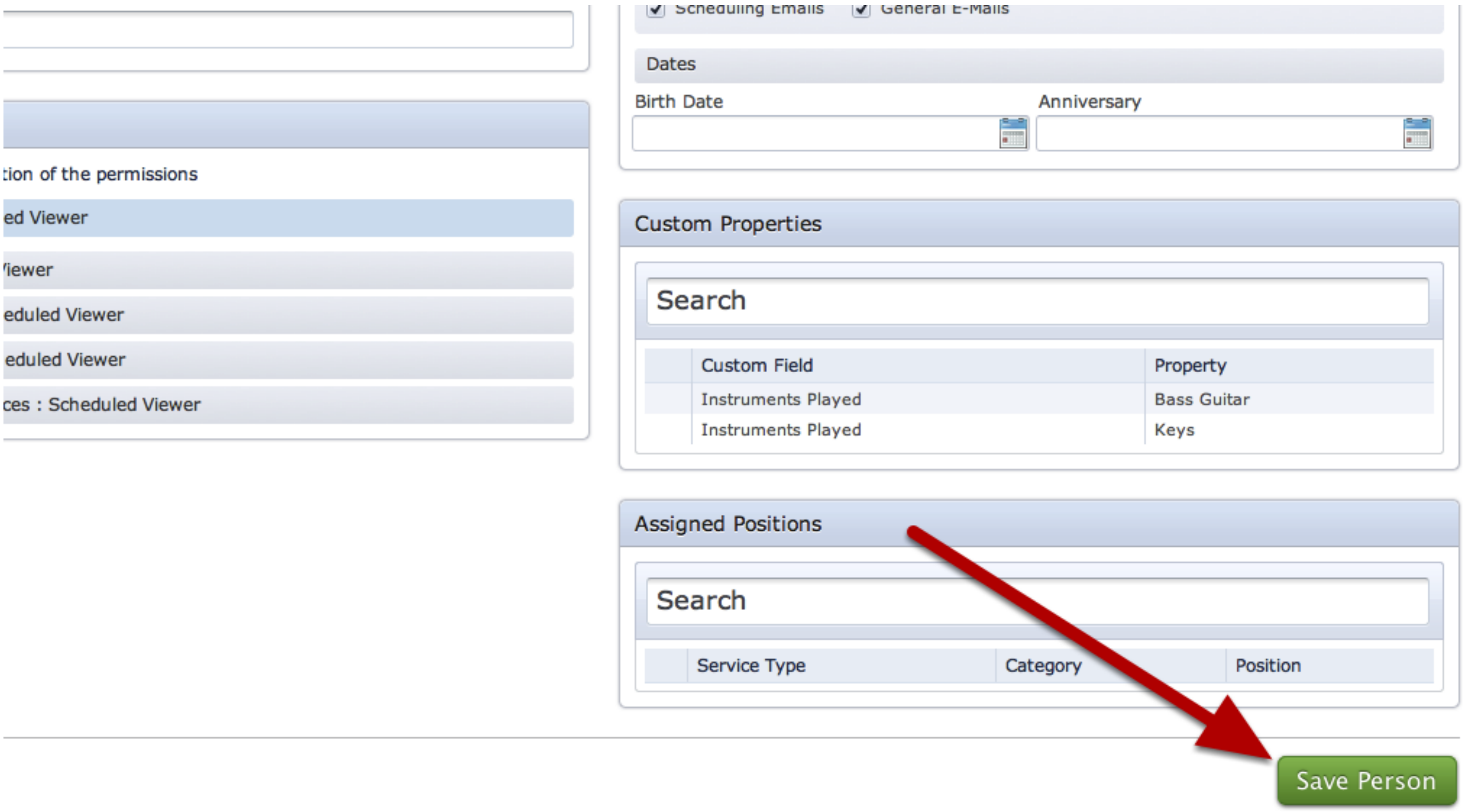
Click 'Change Password'



Type new password then confirm password

Once you've typed in the new password you'd like in the first box, reenter the same password in the second box marked "Confirm Password".

Save Person



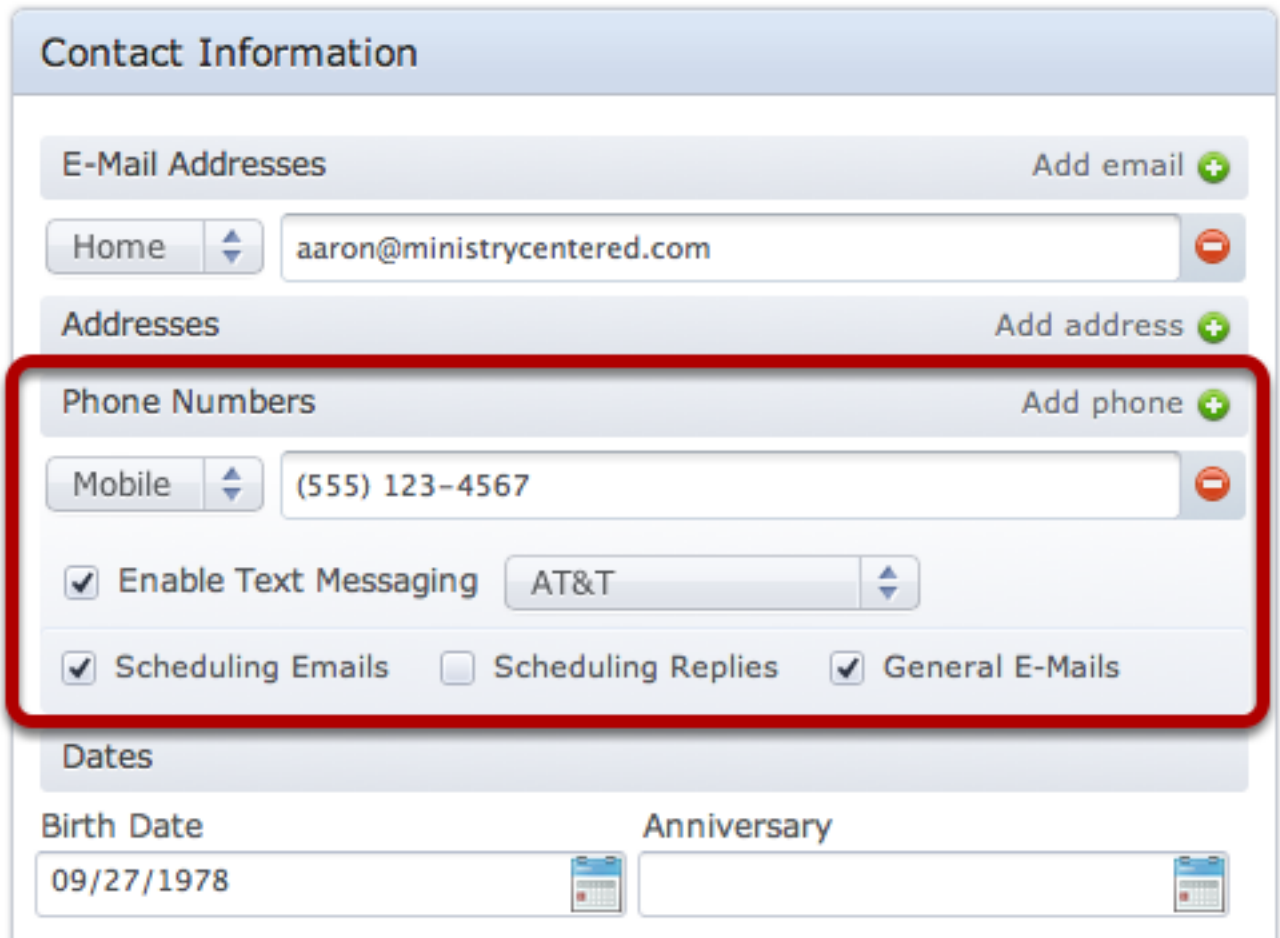
Make sure to click Save Person at the bottom right of the page once you are done entering your password.

Setting Up Text Notifications

Since people can be charged for receiving text messages, each Planning Center user will need to enable text messages for their own account. You cannot enable text messages for someone else.

Login and click on your name in the upper right corner.

Enter in a mobile number, check the "Enable Text Messaging" box, then select your carrier and texting options.



Note: Only users with Scheduler permissions or higher will see the "Scheduling Replies" checkbox.

My Calendar

This lesson explains how to use My Calendar and the features it provides.

My Calendar

Red dates: these are days that you have blocked out or declined.
Grey dates: these are days that have something scheduled in the account, but you are not scheduled for that.
Yellow dates: you have been scheduled for this date but have not yet responded- it's pending.
Green dates: you have been scheduled and have accepted.

Dates will only appear here if the notifications for those plans have been sent out.

To view all of the events on you Planning Center account, click on '**View Master Calendar**'

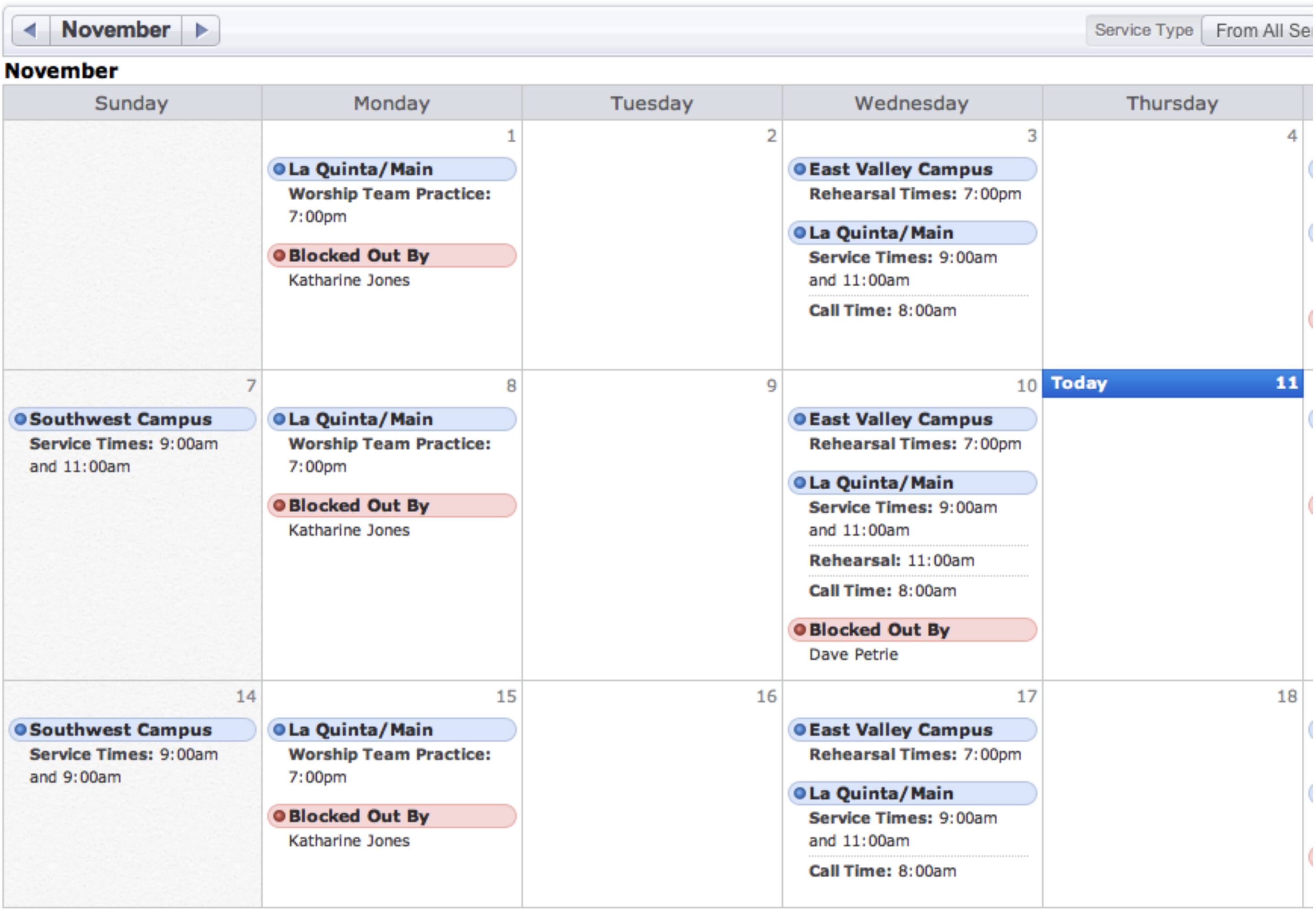
Block Out Dates- Click there to input any block out dates you may have.

Calendar Options:

If you wish to sync your PCO calendar with iCal or Outlook 2007 (MUST be 2007), click the '**link to iCal or Outlook 2007**' link.

If you wish to sync with your Google Calendar in your Gmail account, click on '**link to Google Calendar**'

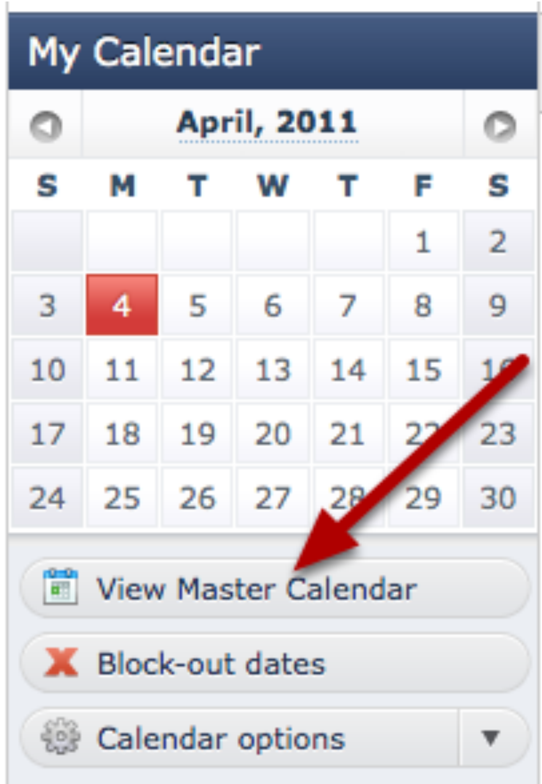
View Master Calendar



After clicking on 'View Master Calendar', you will see the complete calendar for your Planning Center account.
For more information on the Master Calendar, see the article "Master Calendar".

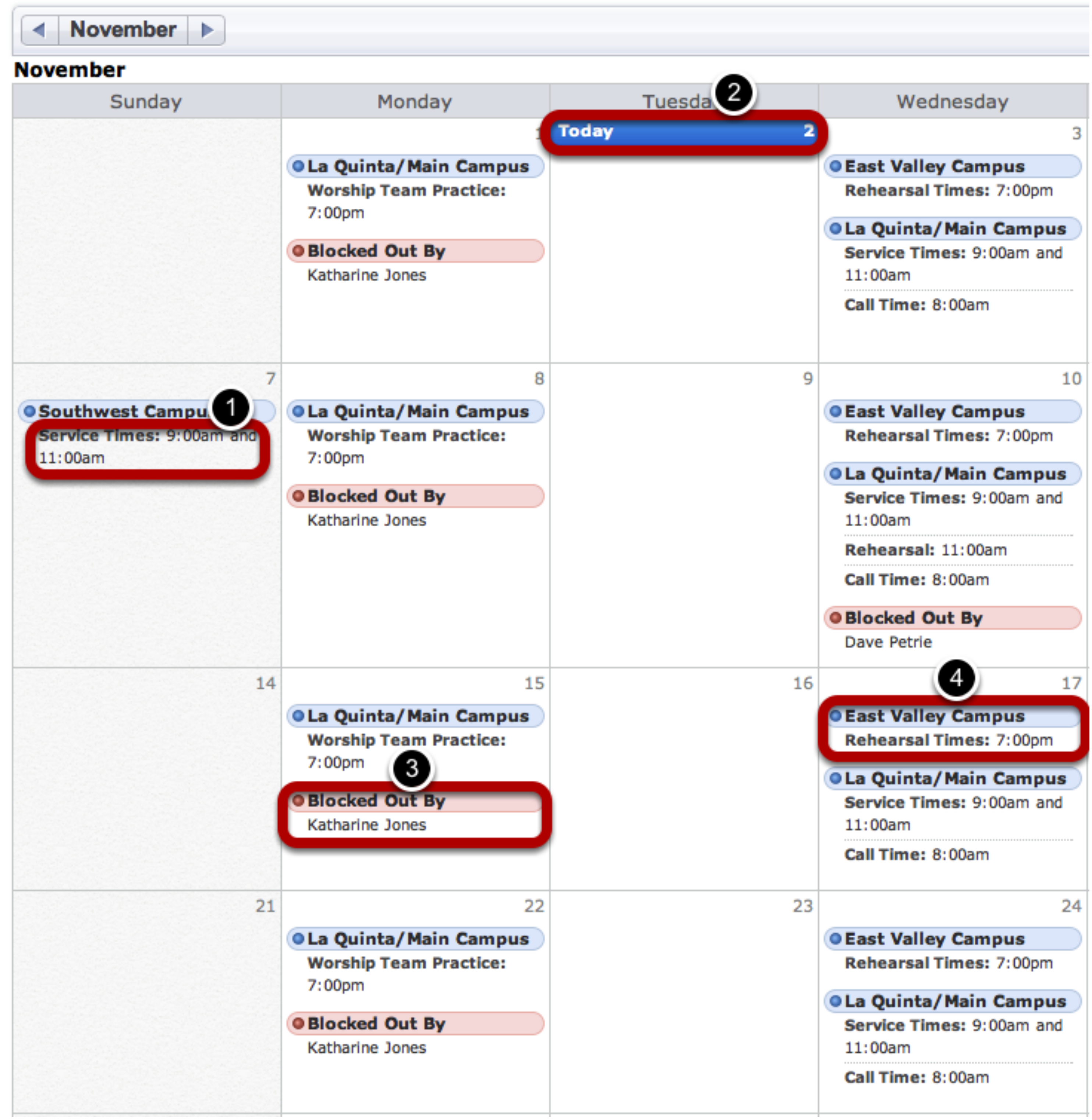
Master Calendar

Click on "View Master Calendar"



To see a larger view of all events, people's block-out dates, birthdays and aniversaries.

Larger Calendar View

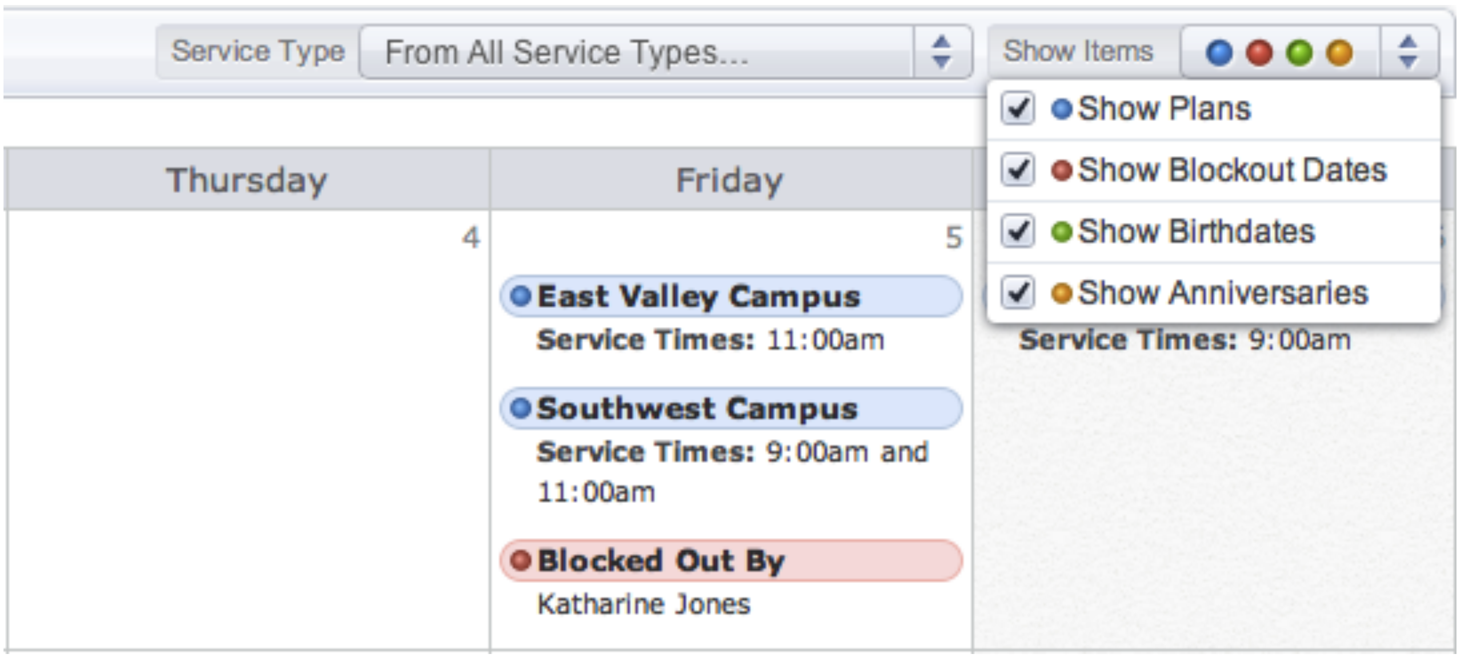


1- This is showing the services that are happening on that date. It indicates the time, and the name of the service.
2- The blue bar indicates the current date.
3- Everyone's block out dates are indicated in this calendar, and are indicated by the red bars. All

of the people unavailable that day are listed underneath.
4- All rehearsal times are also shown. Under the name of the service is the title of the rehearsal time that was typed in that specific plan.

All service titles are links. You can click on one and it will take you directly to that plan.

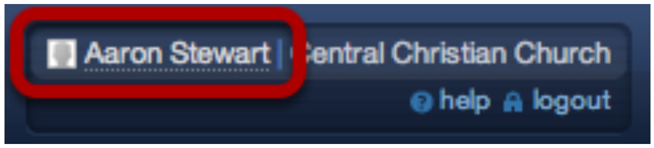
Filtering the Master Calendar



You can also filter which items are visable by clicking the items filer in the upper right corner, and choosing the items you would like to see.

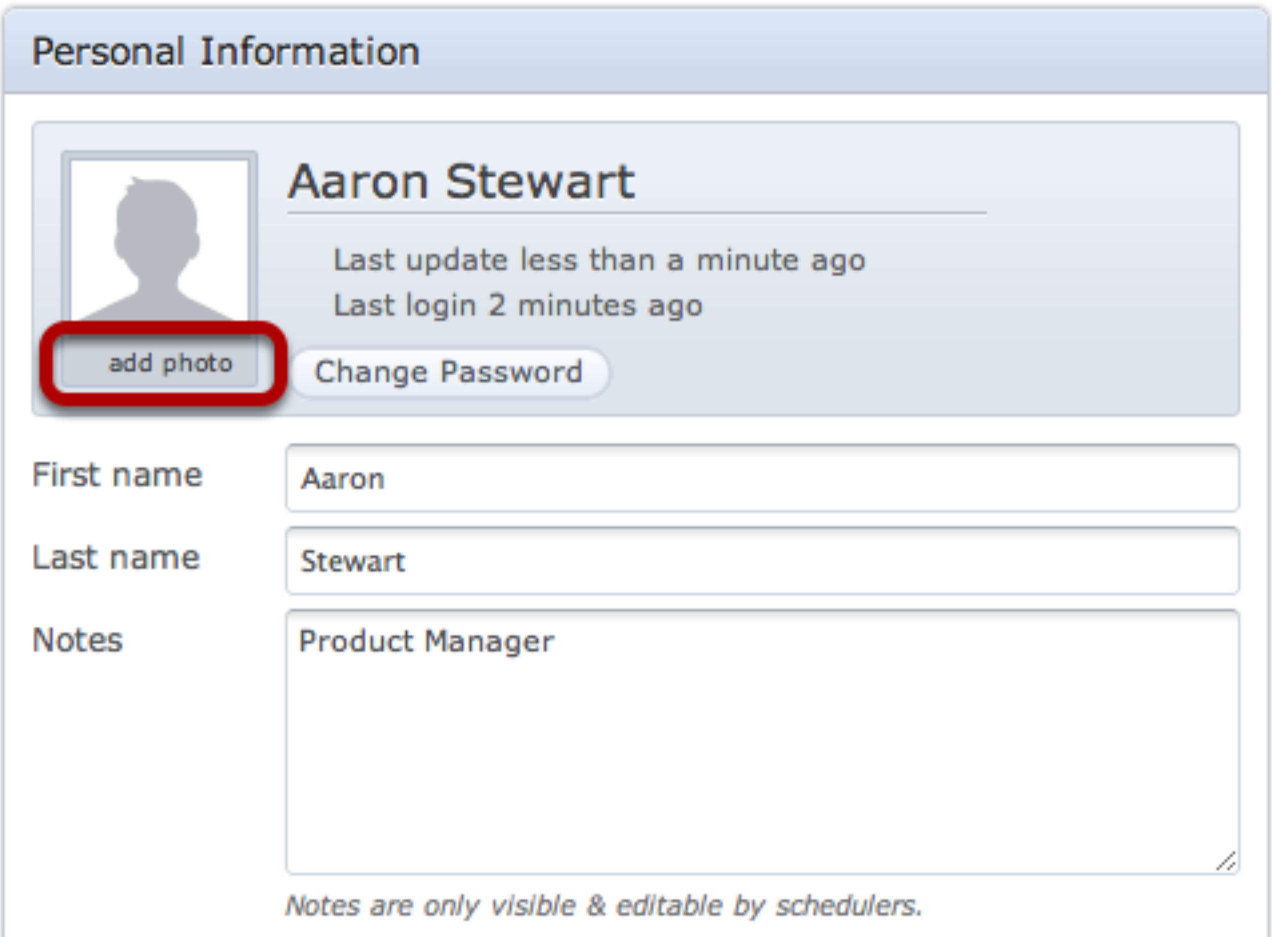
Adding or Changing a Profile Picture

Click on your name to get to your profile page



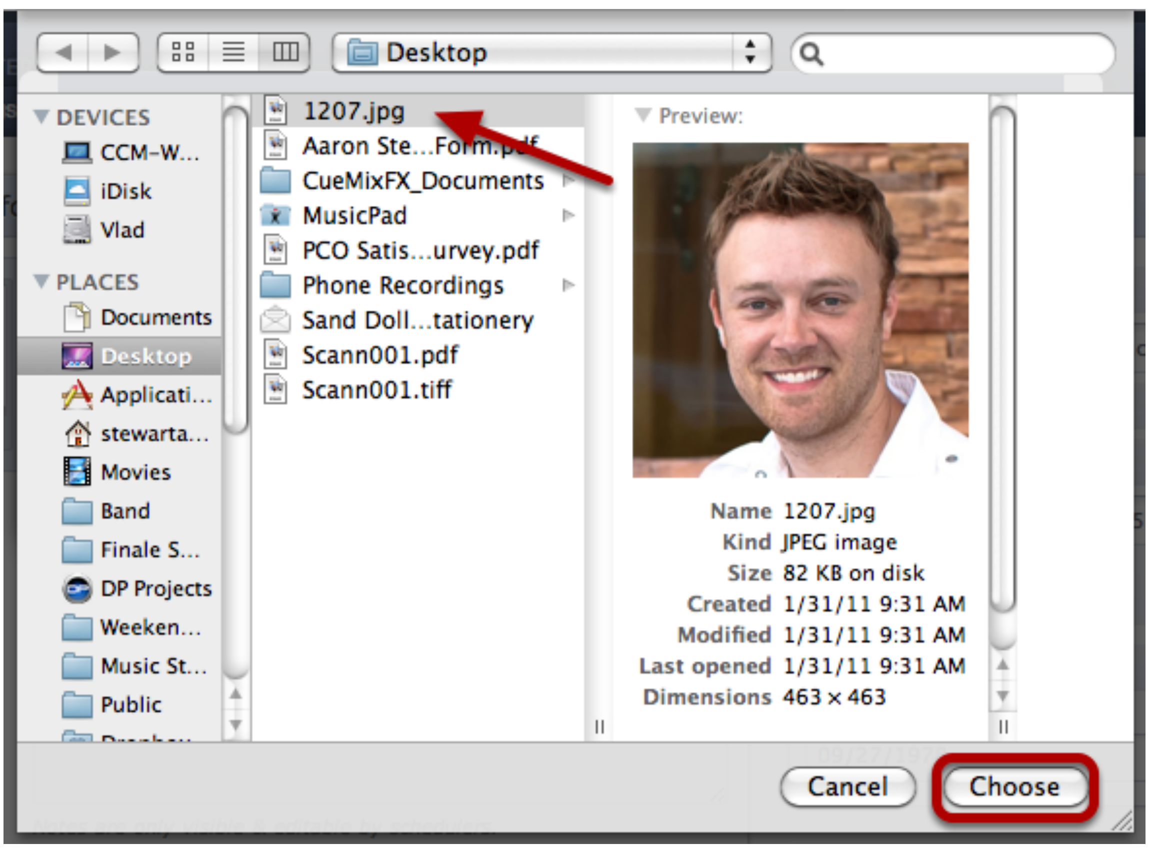
Your name is in the very upper right of Planning Center

On your profile page, click Add Photo



Click Choose File to find the file.

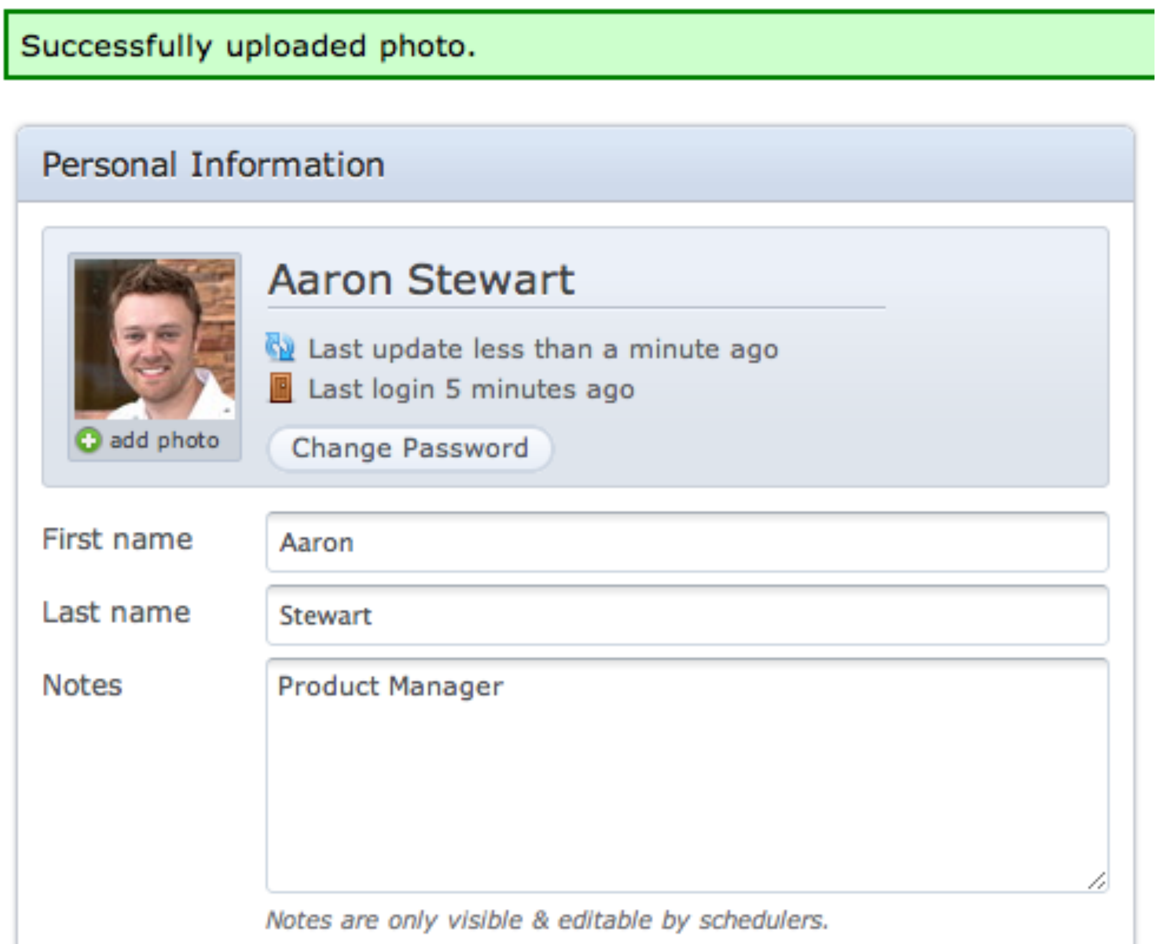
Select file, click Choose.



Make sure that your photo is 2 MB or less, and that it's JPG, PNG, or GIF.

Click Accept to upload photo.

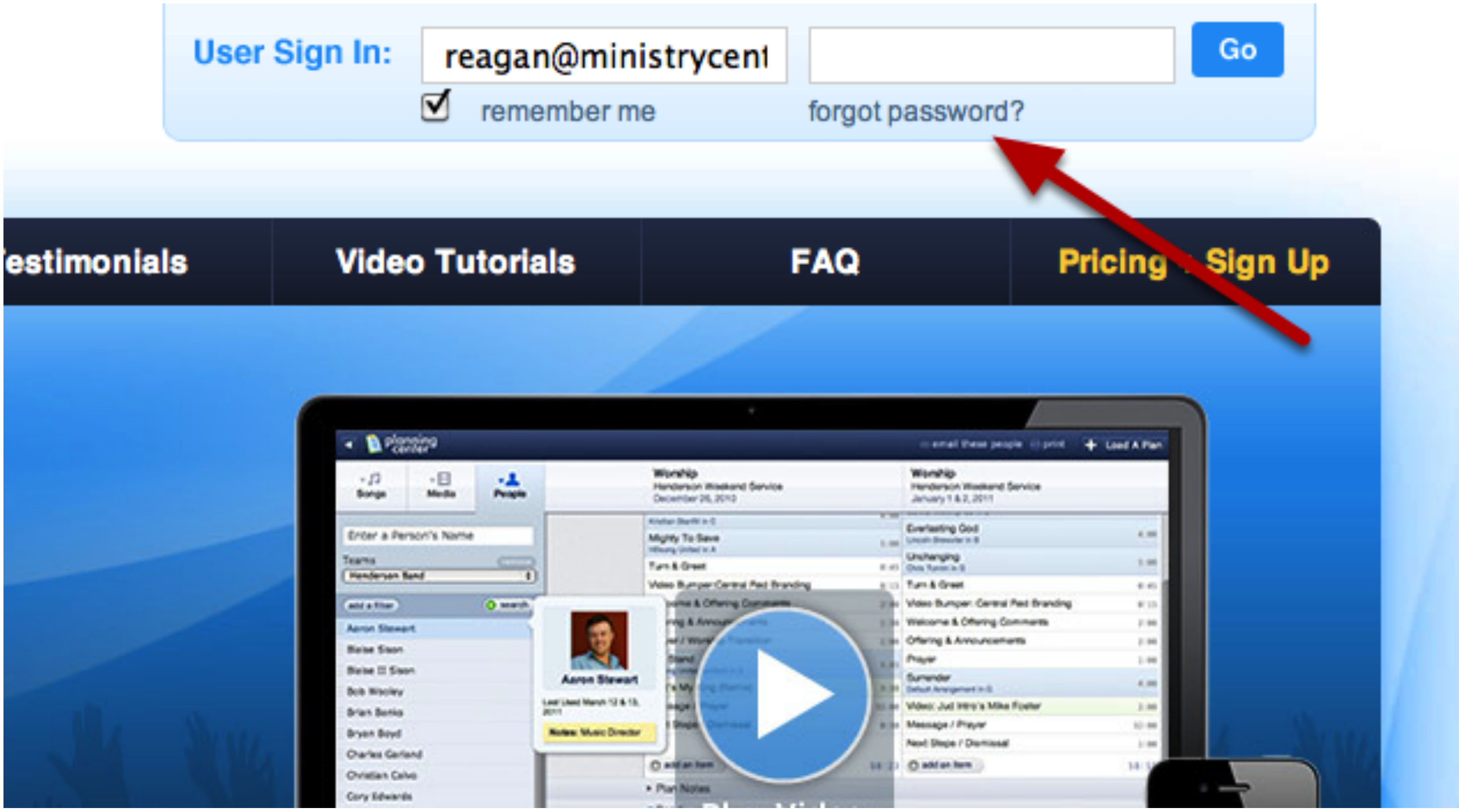
Photo is Uploaded.



Forgotten Password, Login Issues and Error Message

This lesson will show you how to request your forgotten password, and help you troubleshoot common login issues.

Forgotten Password

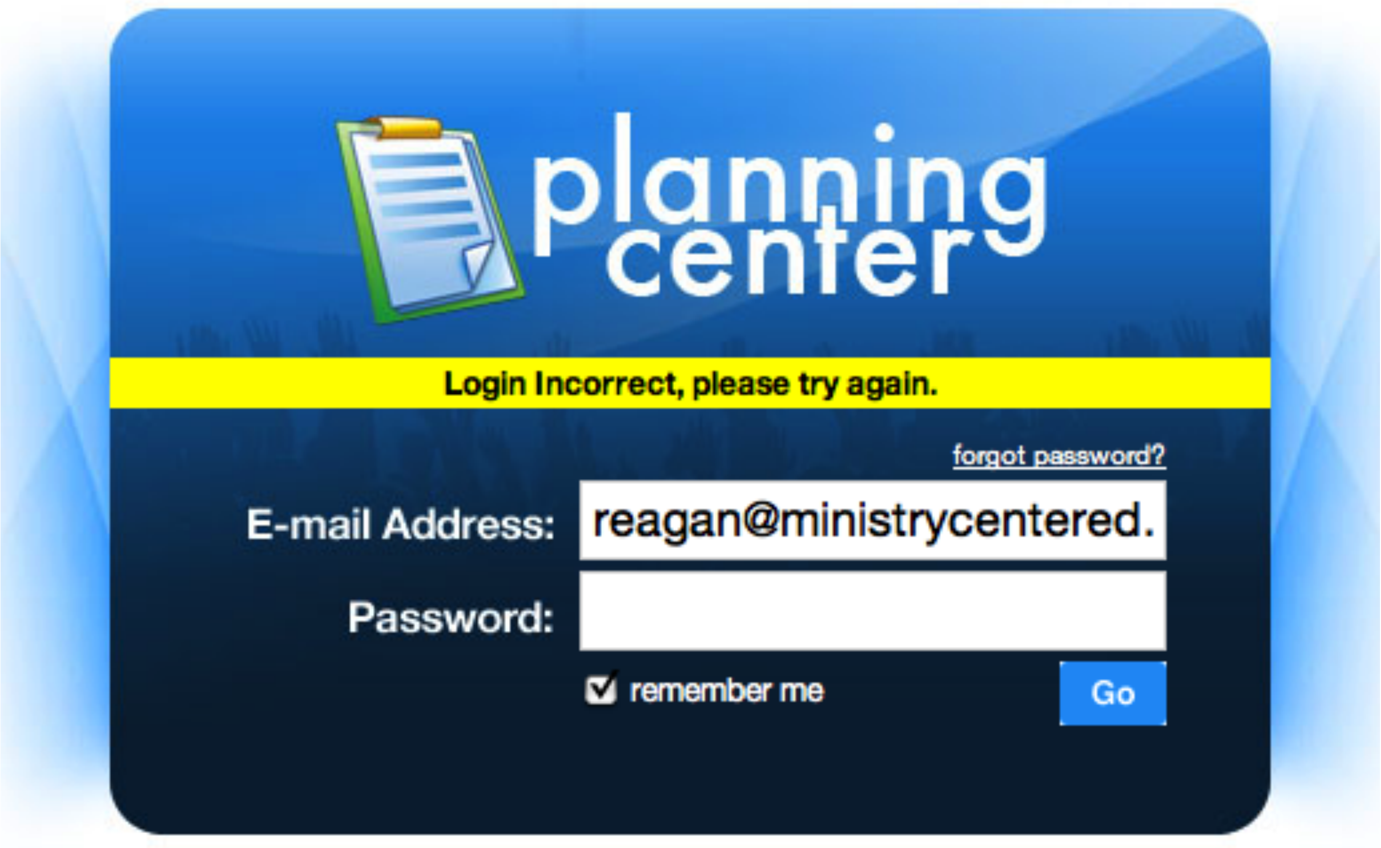


Click on the 'forgot password?' link...

Request Reset

Then enter your E-Mail Address, and click on the 'Request Password Reset' button. An email will be sent to that address with any existing login information.

If You Get the Yellow Error Message:



If this is the screen that you are seeing when you are attempting to login, then the email and password combination you have entered doesn't match any that we have on file.

1. Make sure that the email you have entered is the one that your Planning Center notifications are sent to, and not another that you may have.
2. Make sure that the emal you have entered doesn't have any spaces in it. (Try typing it from scratch if it's been auto-filled).
3. Make sure that the password that you have entered is the correct one. Click on the 'forgot password?' link to have the correct one sent to you.

If Your Screen Resets Without an Error Message:

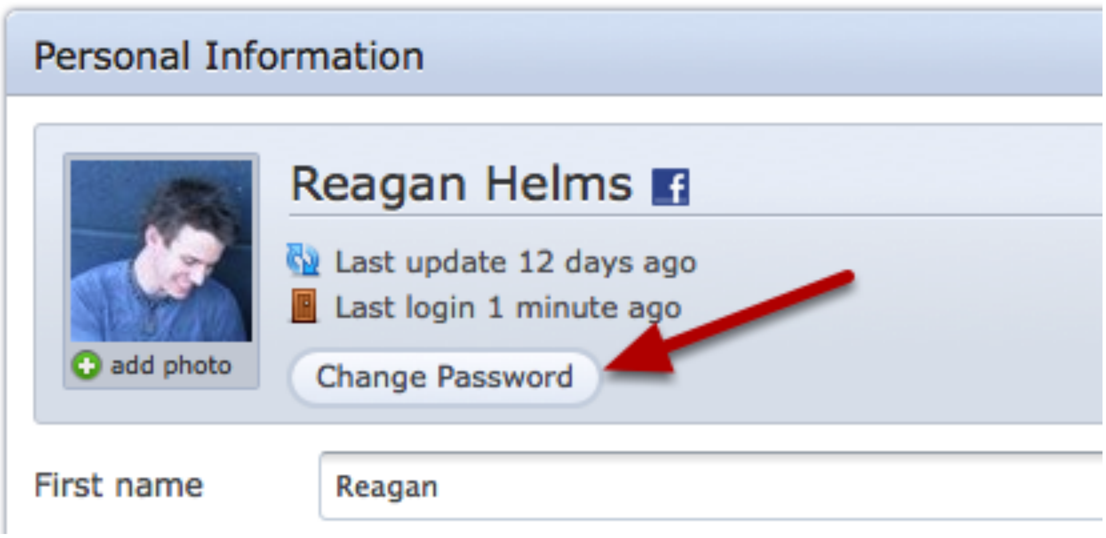
If you enter your password, and the screen resets without an error message, here are a few things that you can try.

- Make sure that you disable any cookie blockers that you might have
- Please disable any plugins that might be hindering you
- Make sure that Planning Center is added as a trusted site in your web browser
- Check and see if your security software or network settings are blocking you from logging in.

Linking Accounts

This lesson shows you how to link your accounts when you have more than one Planning Center account (accounts with multiple churches).

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.

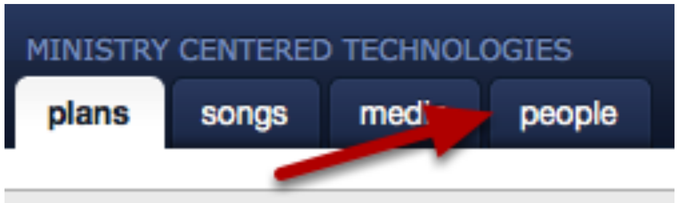
Just click on "link these accounts" if you would like to link them, or click login if you would prefer to keep them unlinked but still have one username or password for both.

People

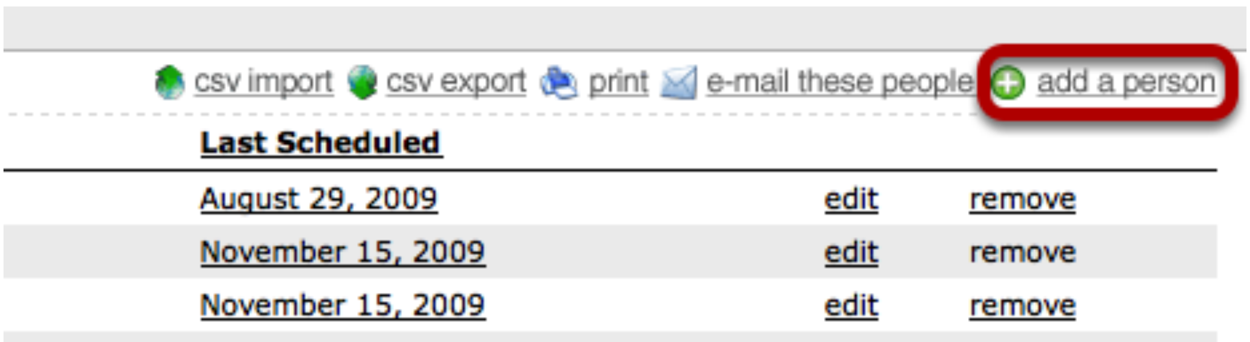
Adding a new person

This lesson will show you how to add a new person to your account.

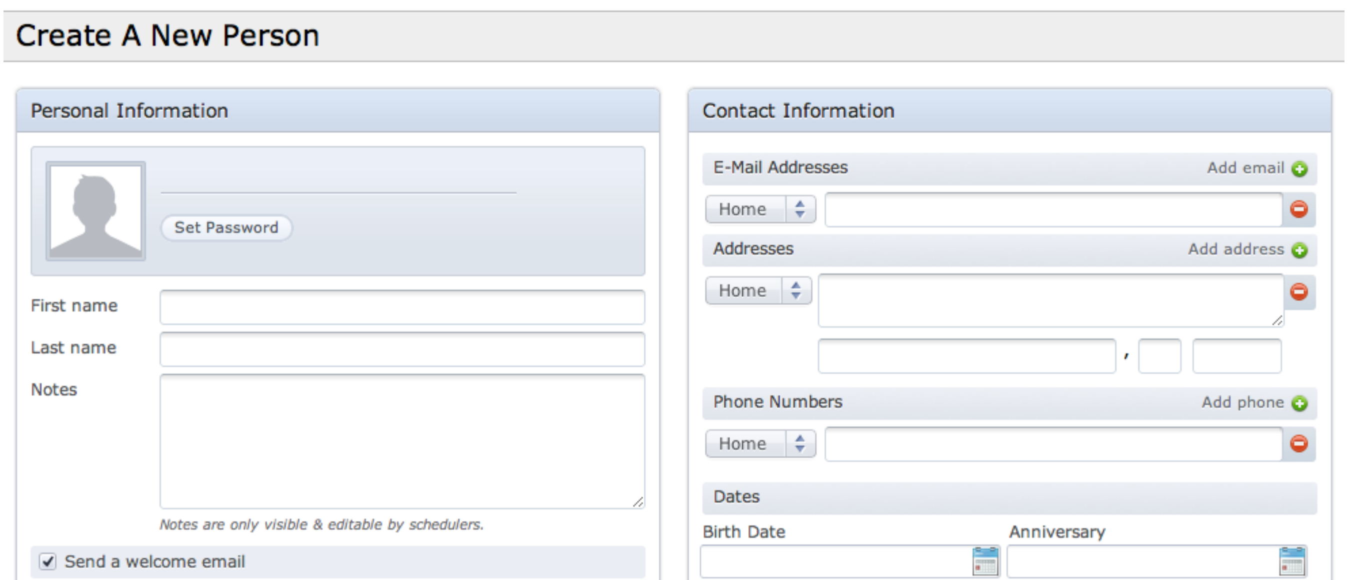
Click on the People tab



Click on add a person



Enter at least first name, last name, and email address

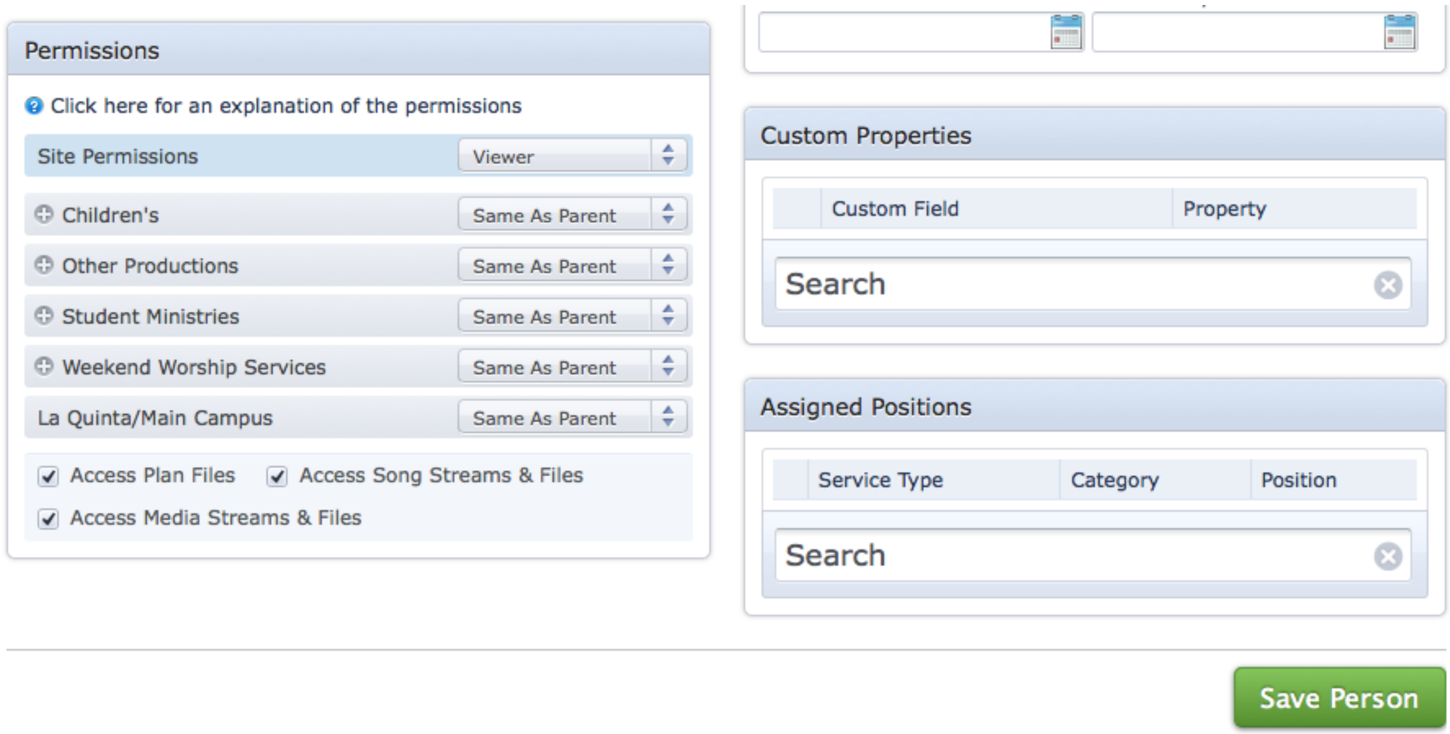


You must at least have a first name, last name, and email address in order for this person to be able to login.

They will automatically be sent a link in their Welcome Email which will take them to a password setup page.

You may add as many email addresses as you'd like. Any email address can be used as their login, and any emails will go to all addresses on their profile page.

Finish and Save



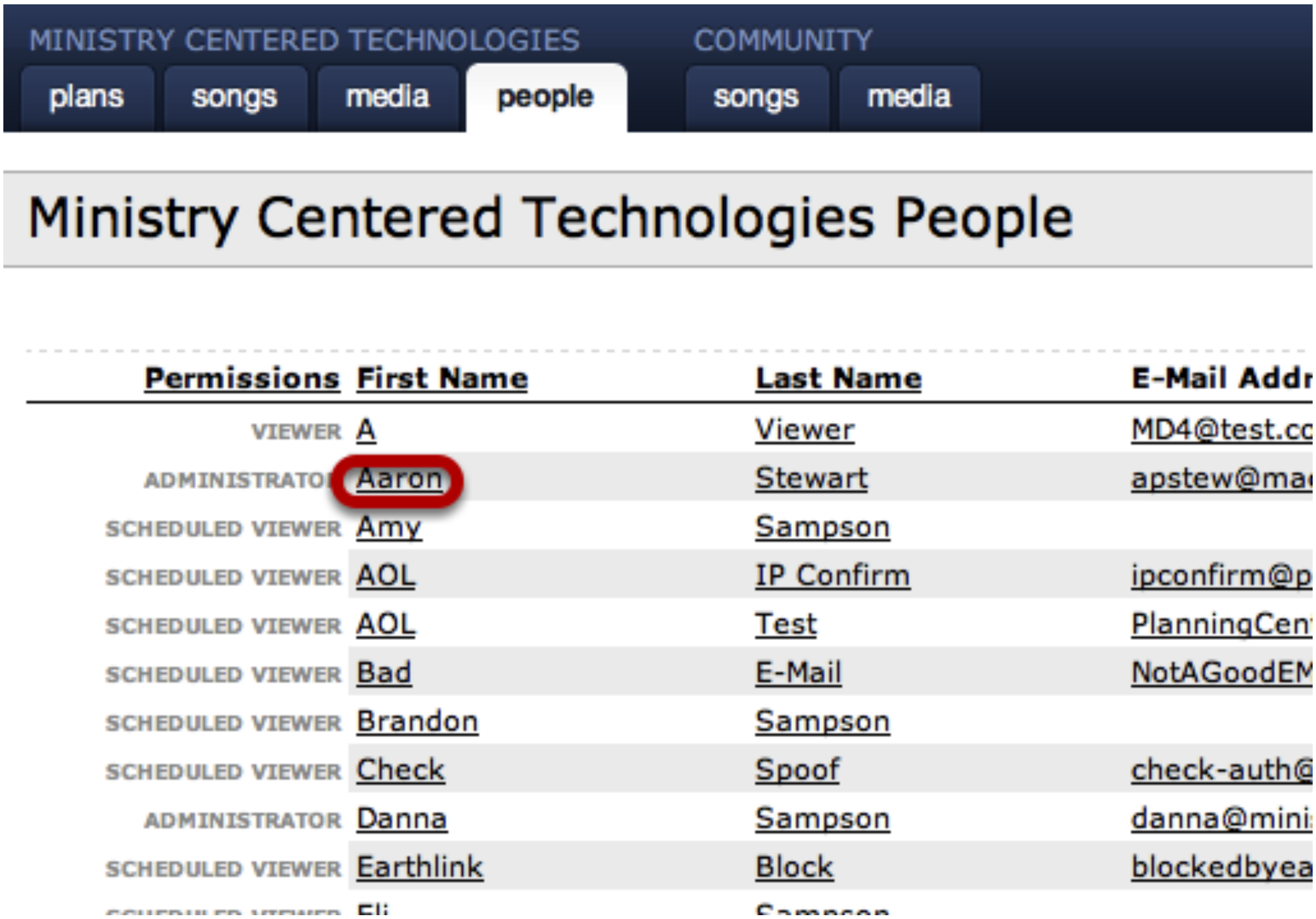
Enter any other information (phone number, birthday, anniversary, etc.) and then make sure permissions are set correctly. For an explanation of permissions, click here.

You can also assign any applicable Custom Properties or Assigned Positions to this new person.

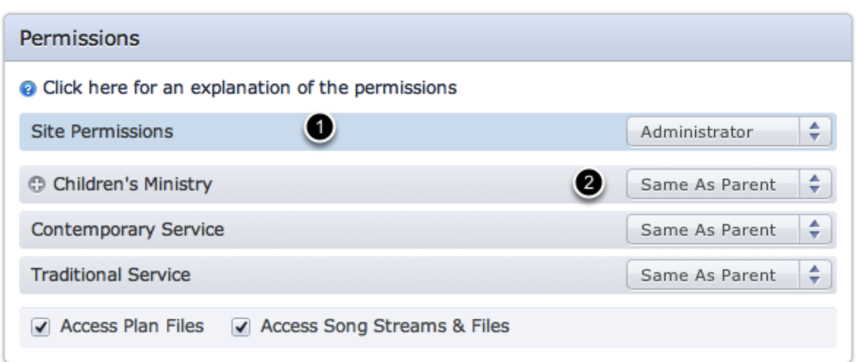
When you are done, click Save Person.

Changing Permissions

On the People page, click on the person's name



Scroll to the bottom, to change their permissions



1. This is the Sit Permission. In order to have general setting rights, you must set the Site Permission accordingly (i.e. if you want a person to be able to edit custom properties on the People page they must have the parent permission of editor- but you can still set their service

permissions differently).

2. If there is a + icon (like the one to the left of Children's Ministry), that means it's a folder in your account and you'll need to click the + next to it to expand and also set or edit the permissions for the specific service/s under that folder.

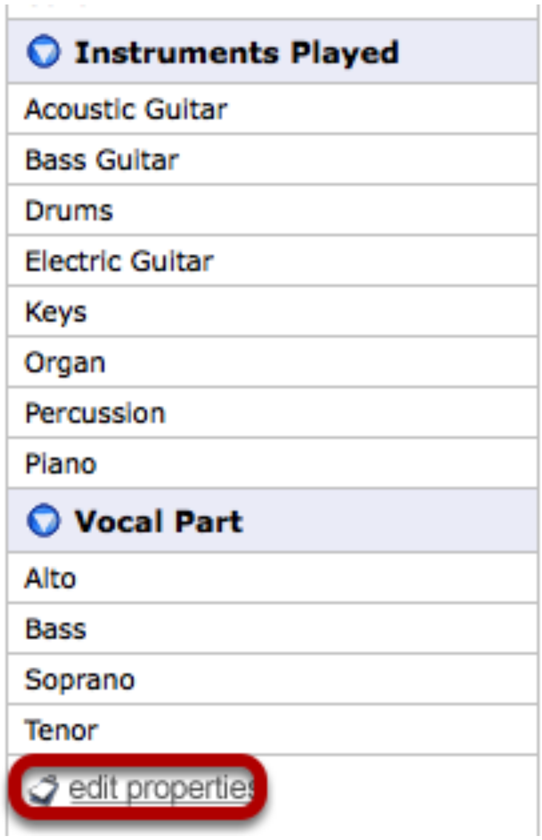
Explanation of Permissions

Disabled - User cannot login and is excluded from all e-mails & filters, and cannot be scheduled to a plan.
Same as Parent - Will use the same permissions as the group above that service. If there is not a group above it, it will inherit the site permissions.
Scheduled Viewer - Can only view plans that they have been scheduled for and that the notification e-mail has been sent.
Viewer - Can view all plans & songs. Cannot edit or change anything on the site. Can see People page if setting in Site Settings is changed to allow this.
Scheduler - Can view all plans & songs. Can edit & schedule people.
Editor - Can edit all plans, people & songs. Does not have access to Properties page (templates, categories, service properties).
Administrator - Can change permissions for the service (templates & categories). Can access Properties page.

Creating groups or teams for scheduling

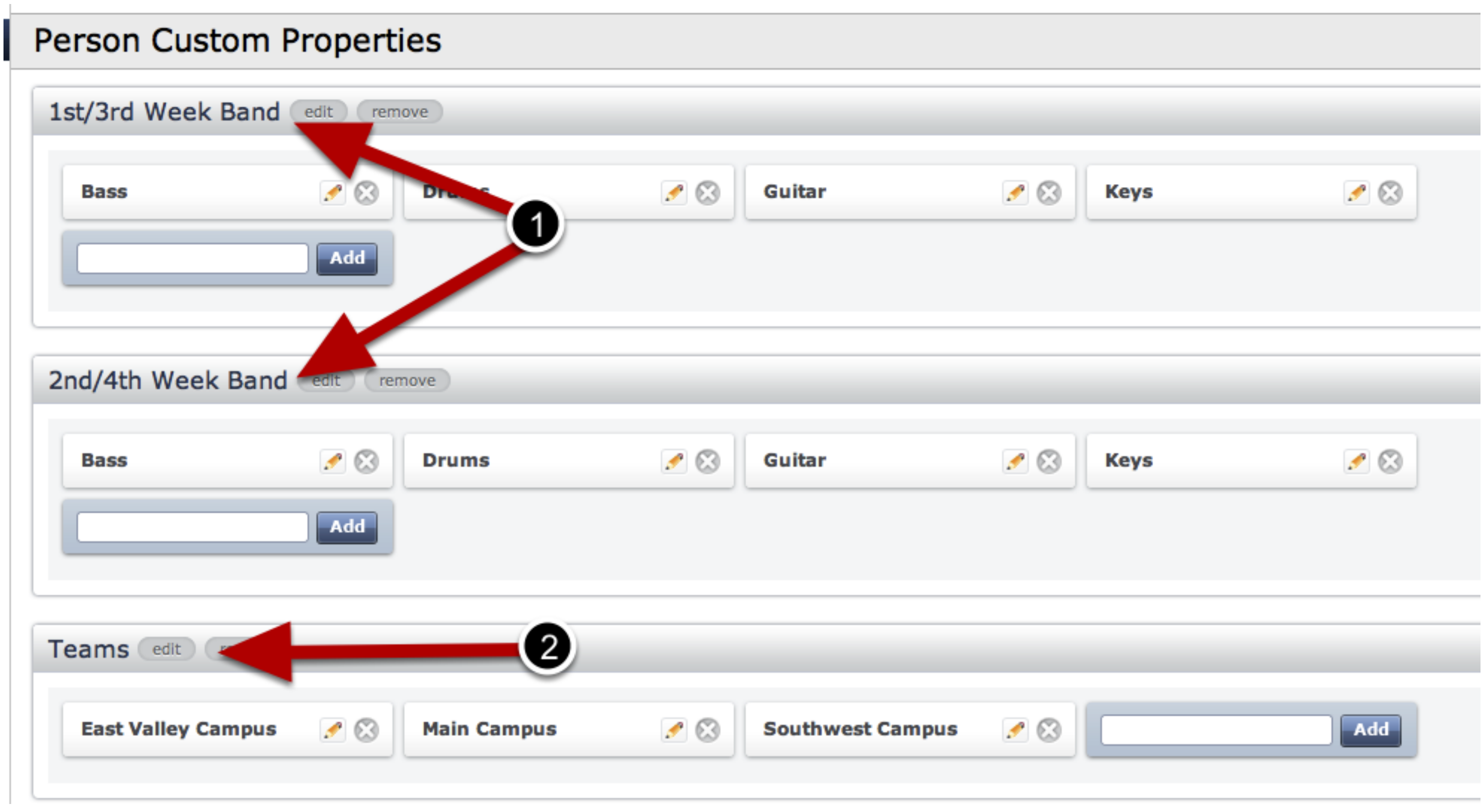
This lesson shows you how to create groups for scheduling your people. For instance: if you had a choir that you wanted to schedule all at one time, you would follow these directions. Or, if you had groups by the week that you wanted to schedule all at once (i.e. 2nd Sun. of the month, 3rd Sun. of the month, etc.), you would follow these directions as well.

On the People page, Click Edit Properties



The first thing you need to do is set up custom properties in a way that identifies your groups or teams.

Create a custom property called TEAMS, or, called a specific team name.

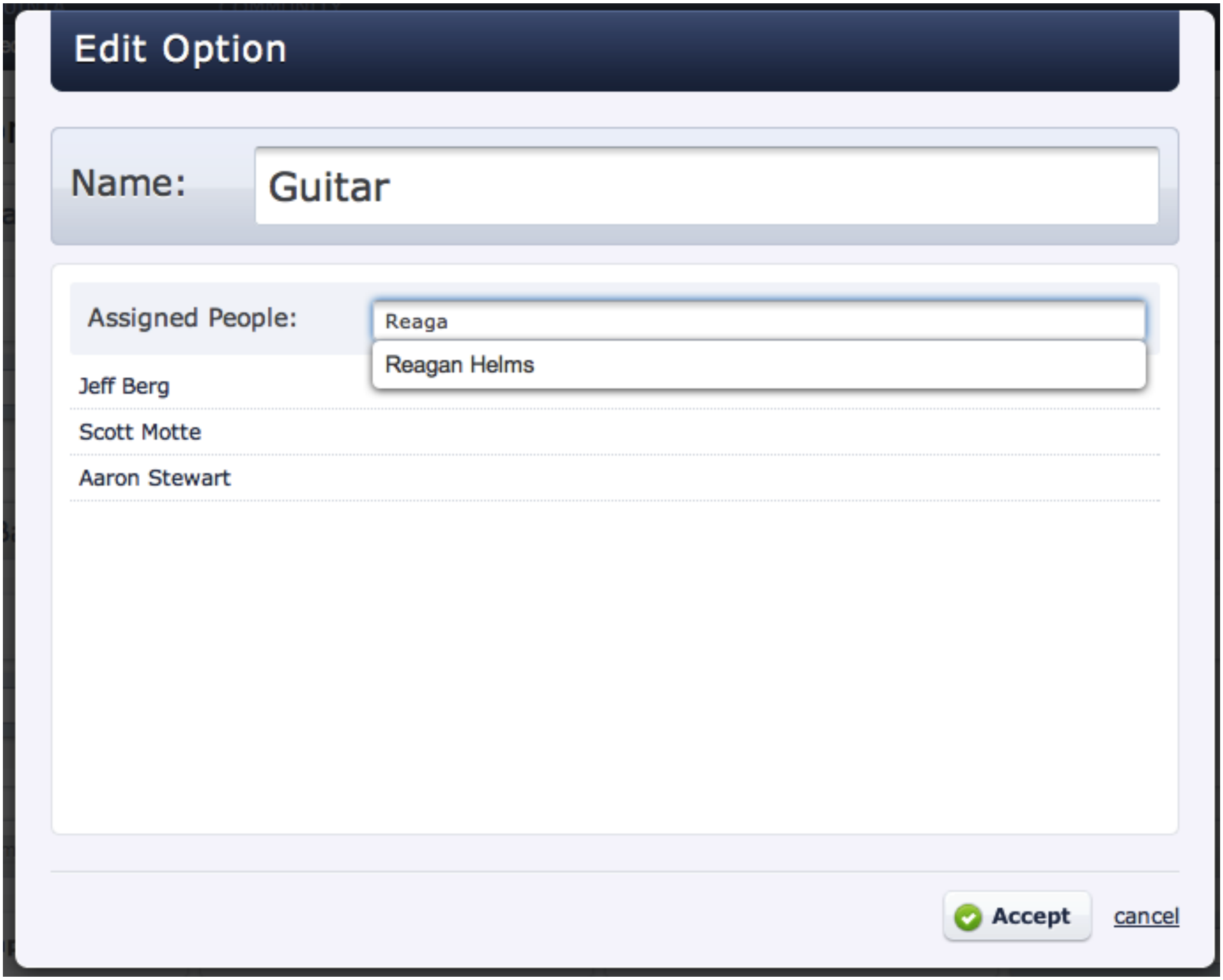


This option really depends on how you want it set up.

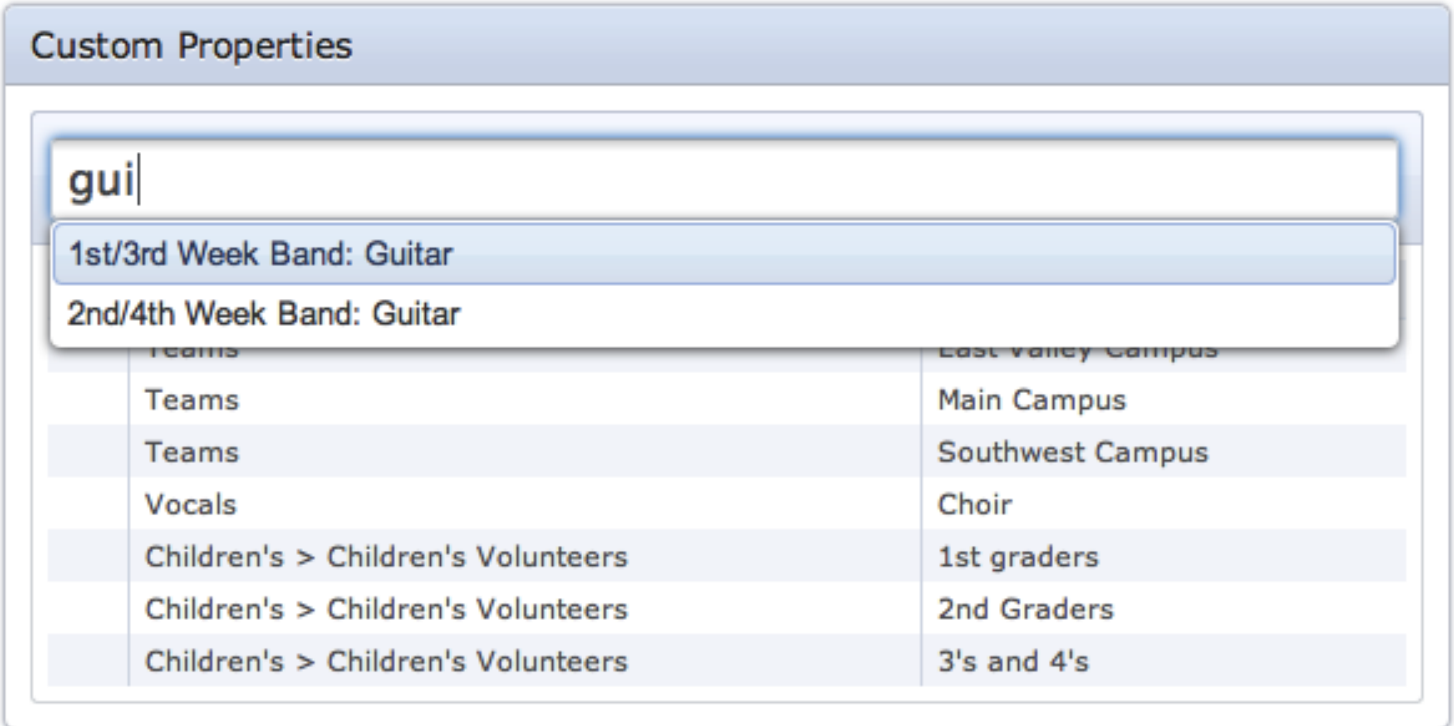
Example 1: if you are creating something like different band teams, you'll want to name each property your team name. That way, your property name is "1st/3rd week band", and under that are all the positions (guitar, keys, drums, vocals, etc.). And then you would have another property called "2nd/4th week band" with all of the positions for that team listed under that as well.

Example 2: if you have a serving team that you're trying to set up that just consists of teams (not specific positions under each team), then you should create a property called TEAMS. Then under that we'll create Team A, Team B, etc.

Click on the Pencil Icon to assign people from your database directly to an option.

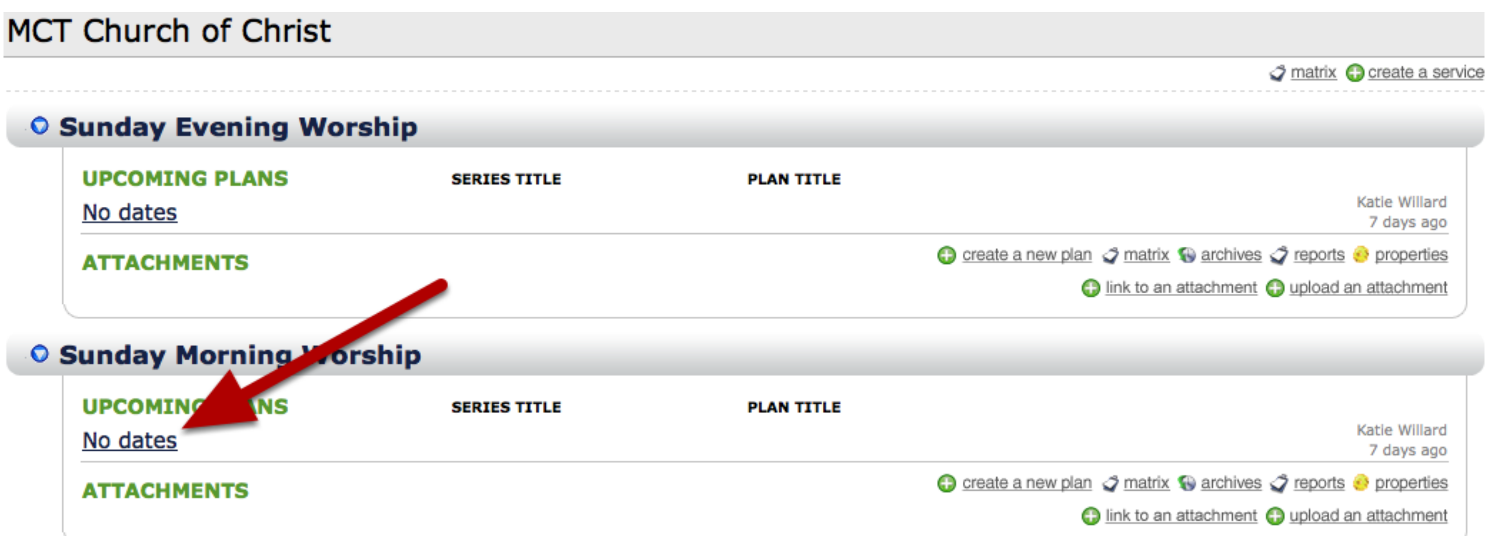


Or assign options to an individual by clicking on their name on the people page...



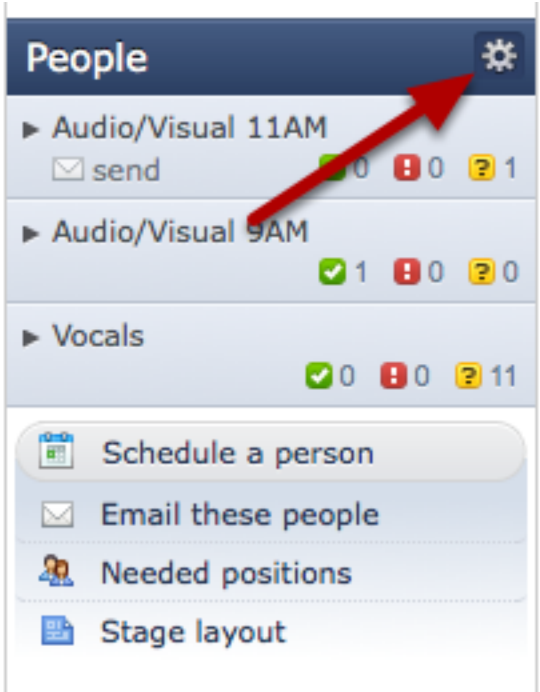
...and then searching for the desired option or custom property.
The list below the search field is a list of options already assigned to this person.

Plans



Back on the main Plans page, click on a plan.

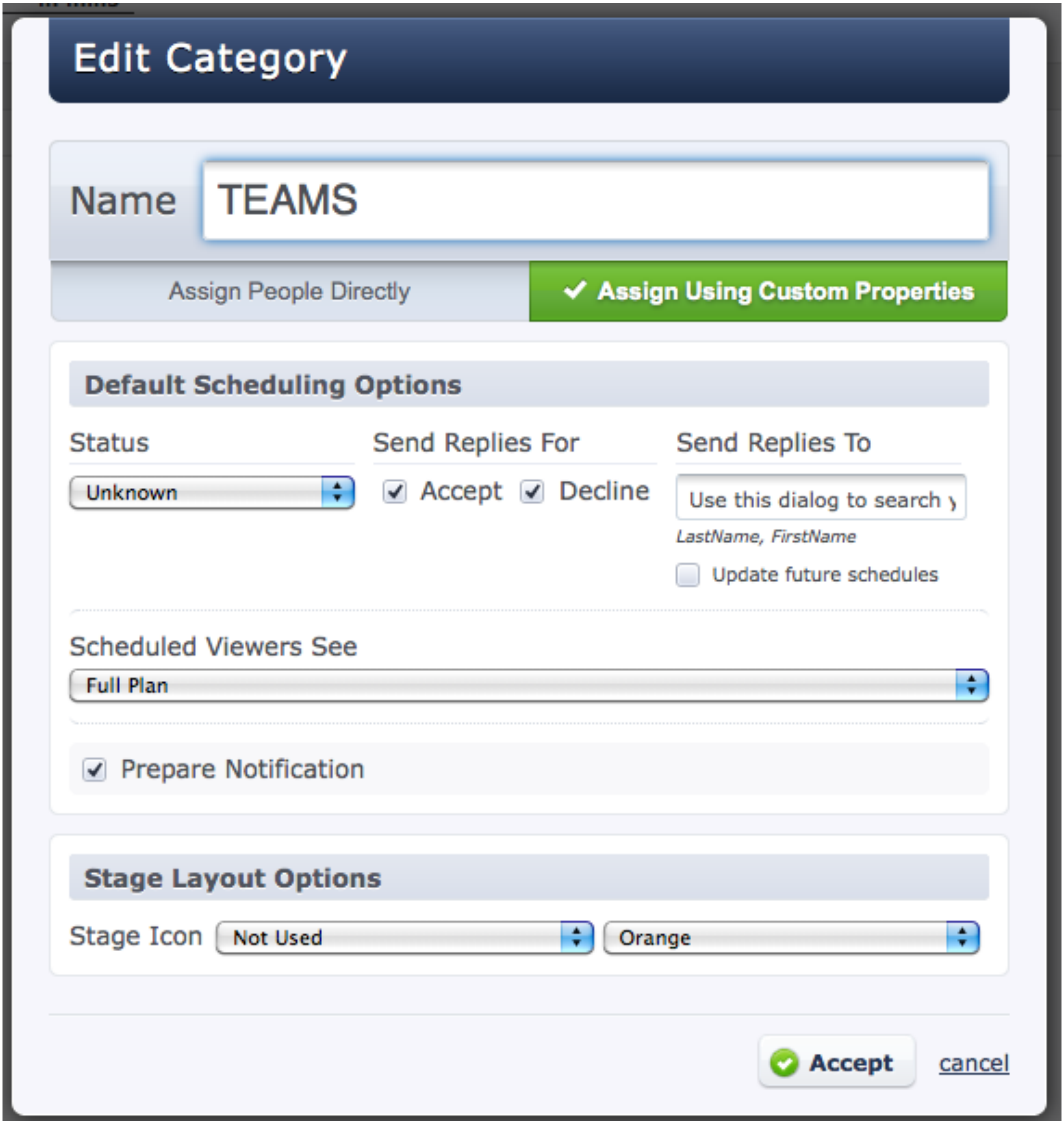
Set Up Categories and Positions.



Hover over the 'People' area on the left of the plan, and click on the gear icon that appears there.

Then click on 'add new category'

Enter in the custom property you had entered on the People Page.



If I enter the category name exactly how I have it on the custom properties area, it will automatically bring in all positions that I had written.

Note: Because we have created custom properties for these different teams, we want to have

"Assign Using Custom Properties" checked, and not "Assign People Directly".

Positions are added. Begin scheduling!

Since I typed in TEAMS exactly how I did in custom properties, it's added all the positions I had entered. Now I can schedule people in my plans for these positions! I'll go through the same last 2 steps to add in the other 2 properties I created, then all of them will be in categories, ready to schedule with.

NOTE: for help on now scheduling these teams, please see our lesson titled Scheduling Groups or Teams.

Can't Add a Person - Duplicate Record Error

This lesson shows you what to do if you are trying to add someone into the system and it's showing you a "duplicate record" error. Also this lesson touches on how to find and restore disabled accounts.

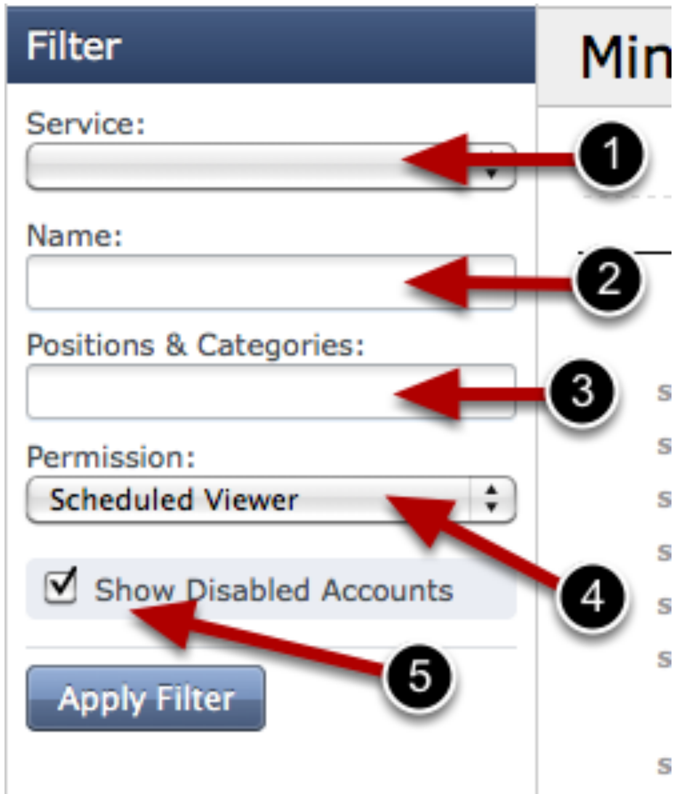
Duplicate Records:

If you are receiving this message, most likely this person is already in the system, but they are just disabled. Our lesson on Enabling a User will cover how to recover them

Filtering Your People

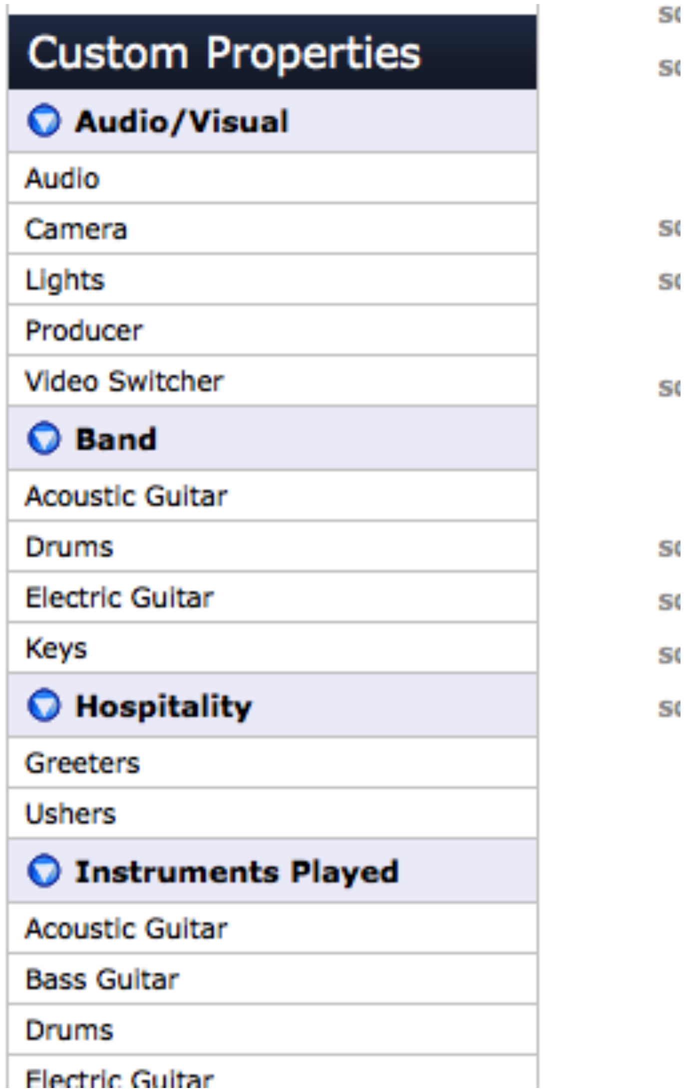
This lesson shows you how to filter your people on the People page. It also shows you how to send an email to a filtered group of people.

Two ways of filtering. One: Filter by service, name, or disabled accounts



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 name here. 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.

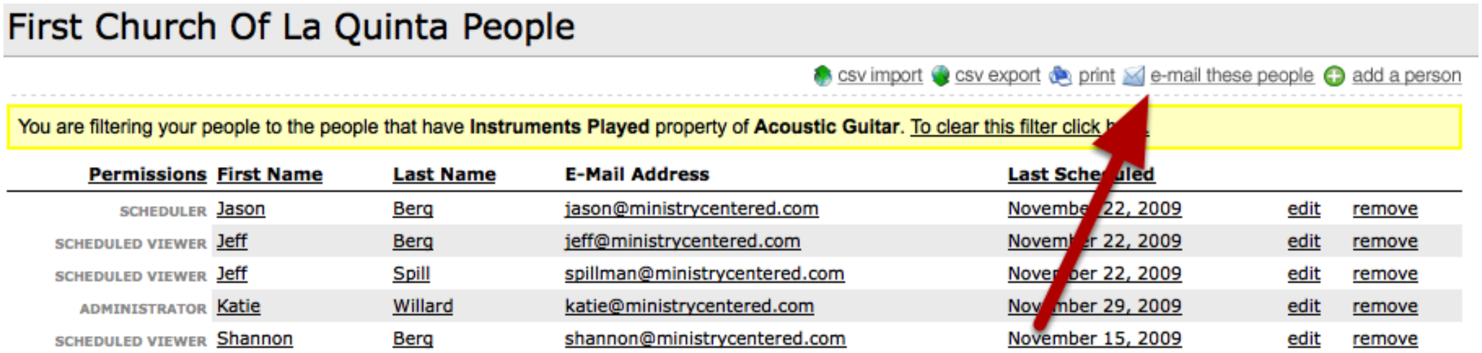
Filter by Custom Property



You can click on either the property (i.e. Audio/Visual) or the options under the property (i.e. Audio, Camera, Lights, etc.). If you want to get more of a detailed filter, you can click on several of them. Some filter with And (pulling all those who have an audio/visual property AND a producer property) and some filter with OR. Here is a list of how the different combinations are filtered (there is not a way to choose whether you want to filter "And" or "Or"):

Property and Property: filtering OR
Property and Option: filtering AND
Option and Option from the same property: filtering OR
Option and Option from different properties: filtering AND

To email people with a filtered list:

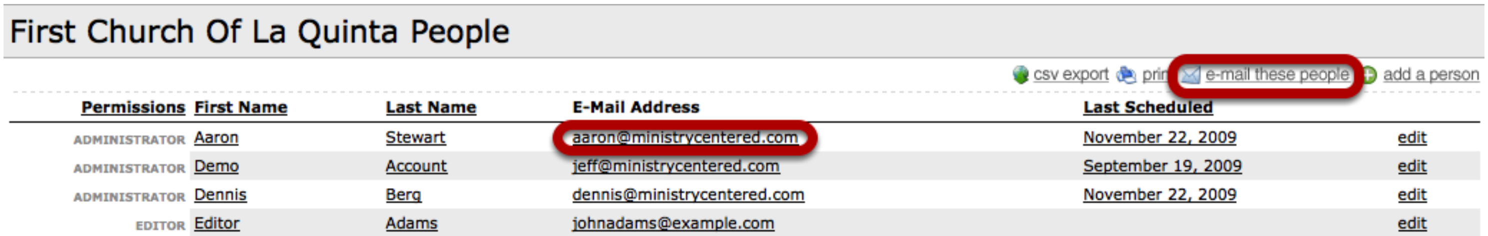


Once you have a filtered list (filter using the ways shown in previous steps), click 'email these people' and it will just send an email to the list that you see. An example of this would be if you want to send an email just to all the greeters in your system. You would click on the Greeter custom property (assuming you have custom properties set up) and then click 'email these people' and write your email.

How to Email from the People Page

This lesson shows you how to email people from the People page, and which permissions can do what.

Administrators, Editors, and Schedulers:



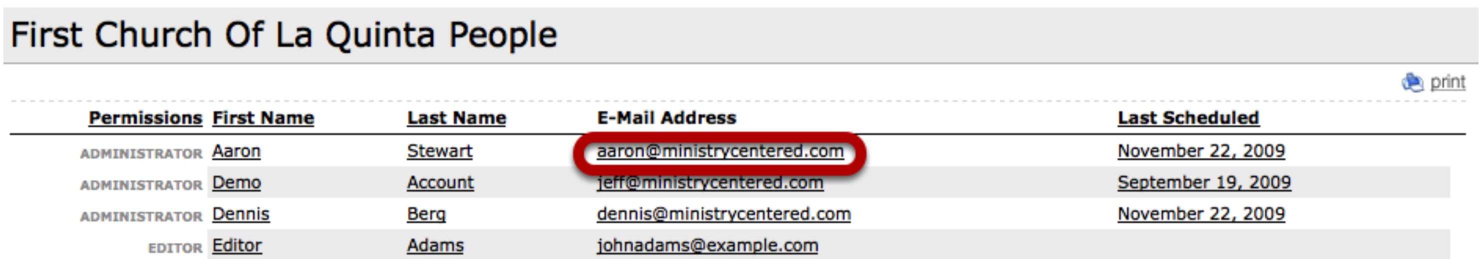
First Church Of La Quinta People

csv export print e-mail these people add a person

Permissions	First Name	Last Name	E-Mail Address	Last Scheduled	
ADMINISTRATOR	Aaron	Stewart	aaron@ministrycentered.com	November 22, 2009	edit
ADMINISTRATOR	Demo	Account	jeff@ministrycentered.com	September 19, 2009	edit
ADMINISTRATOR	Dennis	Berg	dennis@ministrycentered.com	November 22, 2009	edit
EDITOR	Editor	Adams	johnadams@example.com		edit

You are able to click on a person's email address to email them, or you can click 'email these people' in the top right corner.

Viewers:



First Church Of La Quinta People

print

Permissions	First Name	Last Name	E-Mail Address	Last Scheduled
ADMINISTRATOR	Aaron	Stewart	aaron@ministrycentered.com	November 22, 2009
ADMINISTRATOR	Demo	Account	jeff@ministrycentered.com	September 19, 2009
ADMINISTRATOR	Dennis	Berg	dennis@ministrycentered.com	November 22, 2009
EDITOR	Editor	Adams	johnadams@example.com	

Viewers can only email by clicking on a person's email address. Once you click on it, you do have the option to add other people to that email. Viewers do not have the 'email these people' button.

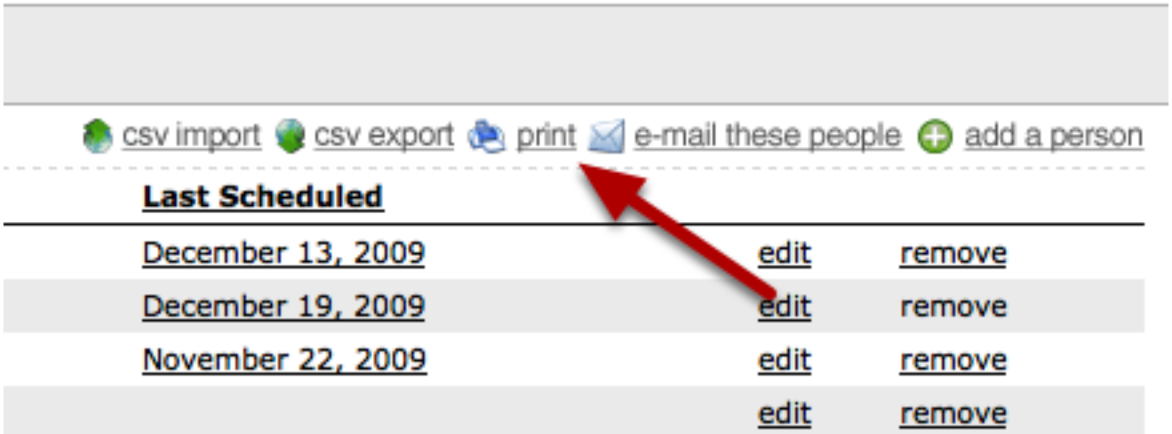
Scheduled Viewers:

Scheduled viewers do not have an option to email anyone through PCO. Since they cannot see the people page, they don't have access to email addresses either.

Print Report Options

This lesson shows you about 3 reports you can print from the People page: People Grouped by Property, Block-Out Dates, and Directory.

On the People page, click Print.



Choose the report you want.

There are 3 reports you could choose from. Below will show you what each of the reports demonstrate.

Directory:

People Directory
First Church Of La Quinta

	Name	Email	Phone
	Aaron Stewart	aaron@ministrycentered.com	
add photo	Demo Account	jeff@ministrycentered.com	
add photo	Dennis Berg	dennis@ministrycentered.com	Home: dude
	Editor Adams	johnadams@example.com yo@email.com	

This is going to give you a printable list of everyone in your system, in alphabetical order. If they have a picture attached, it will show you the picture. It will also list their email address and phone numbers that are in the system. To print, just go to Print through your browser.

Block-Out Dates:

Block-Out Dates
First Church Of La Quinta

	Name	Block-Out Dates
	Aaron Stewart	December 23, 2009 - December 23, 2009: December 30, 2009 - December 30, 2009: January 06, 2010 - January 06, 2010: January 13, 2010 - January 13, 2010: January 20, 2010 - January 20, 2010: January 27, 2010 - January 27, 2010: February 03, 2010 - February 03, 2010:
	Editor Adams	December 23, 2009 - December 28, 2009:
	Katharine Willard	December 04, 2009 - December 04, 2009: December 07, 2009 - December 07, 2009: December 07, 2009 - December 07, 2009: December 11, 2009 - December 11, 2009:

This is going to give you a printable list of everyone in your system that has block-out dates set up at the moment. It will have their name with the block-out dates next to it. If you want this list but just with certain people, first just filter on your People page and then click Print then Block-Out dates. It will only show you a list of the block-out dates of people currently filtered on your People page.

People Grouped by Property:

Band: Acoustic Guitar

Aaron Stewart

Band: Drums

Aaron Stewart

Band: Electric Guitar

Aaron Stewart

Instruments Played: Acoustic Guitar

Jason Berg	
Jeff Berg	
Jeff Spill	760-396-1234
Katie Willard	
Shannon Berg	

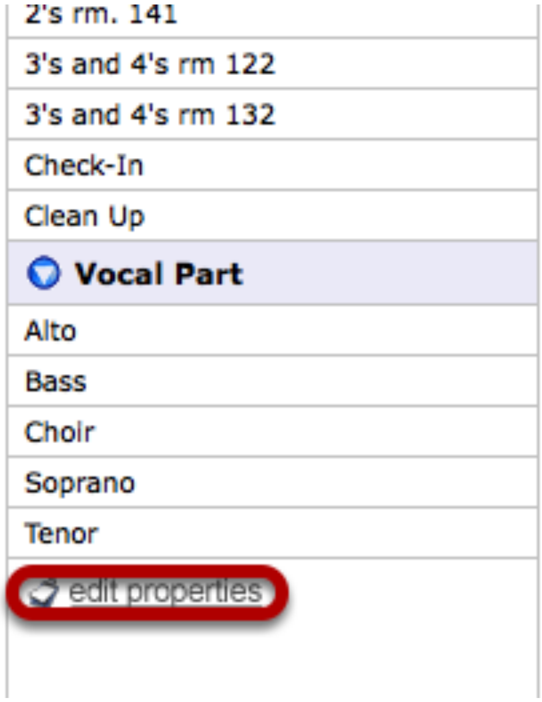
Instruments Played: Bass Guitar

Dennis Berg	dude
Jason Berg	
Jeff Berg	

This is going to give you a printable list of your custom properties and who is assigned to each one.

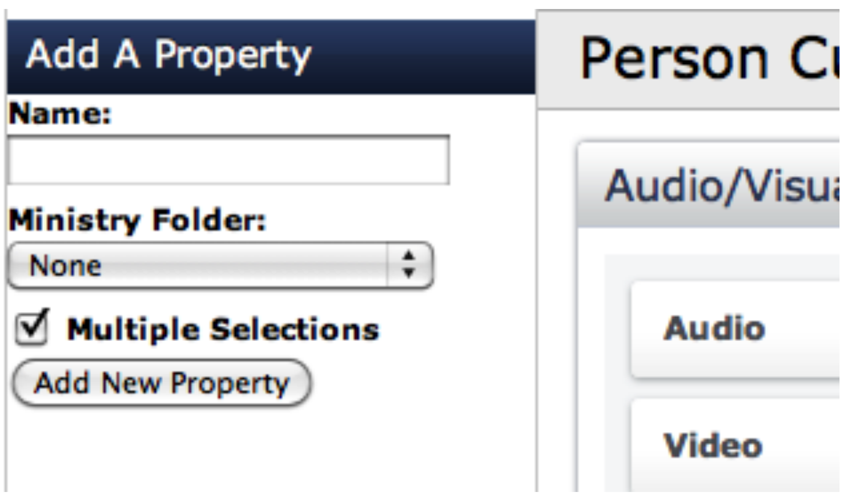
Setting Up Custom Properties

To add custom properties, click 'edit properties'.



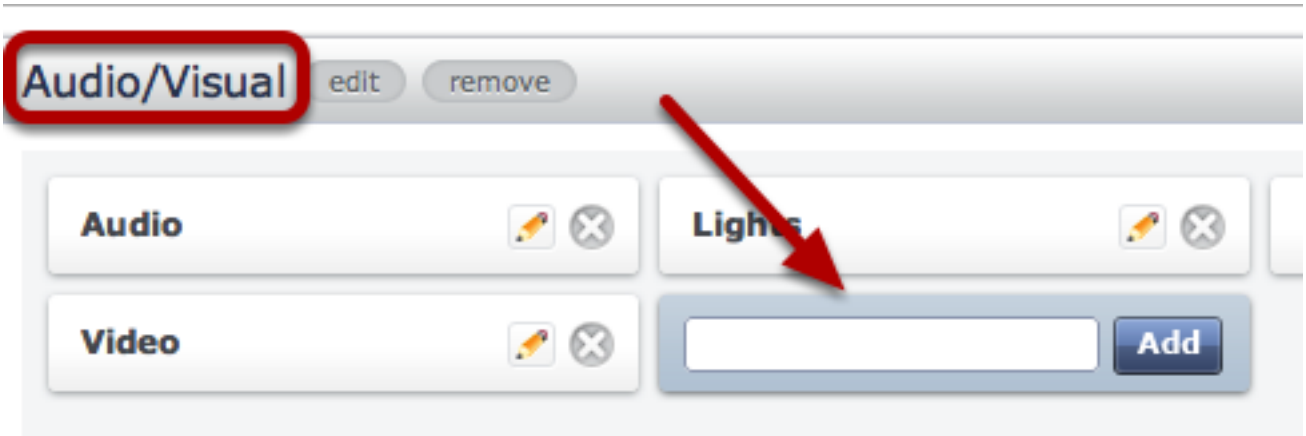
This is at the bottom of the custom properties sidebar on the People page.

Name your property



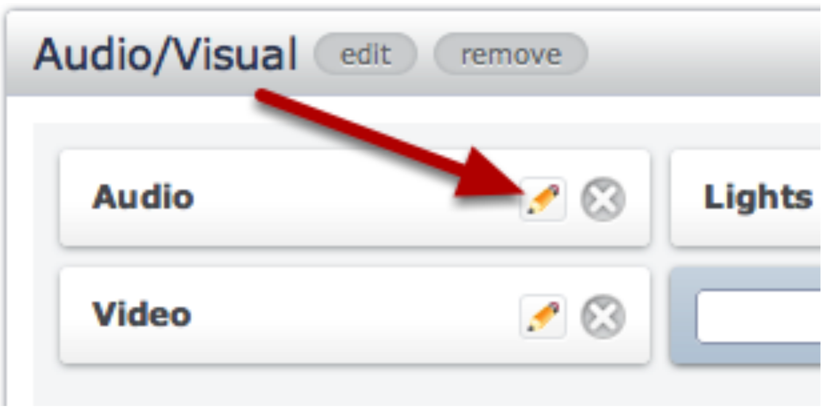
Enter the name of the property and select if you'd like it to be attached specifically to a folder (this is not necessary, just an option).

Enter in options

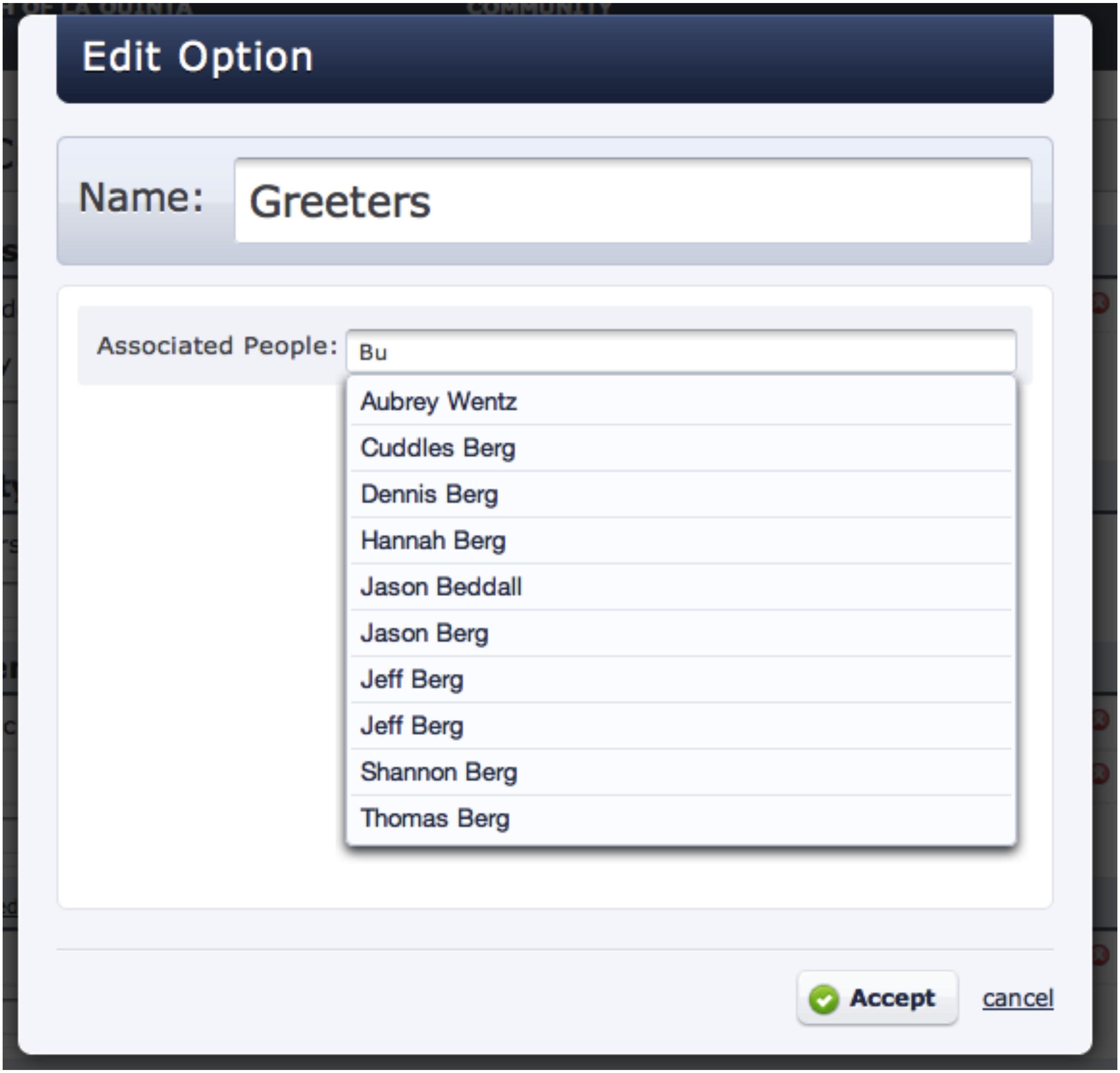


Here is where you begin to enter options, which allow you to assign more specific roles to a certain property. If you are going to make your categories/positions the exact same, this is where you'll add what you want the positions to look like.

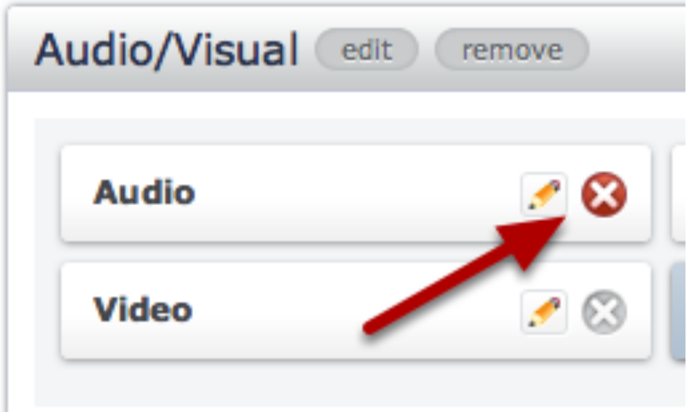
To edit or add people, you can click the pencil icon



Then you will be able to edit the name of the option, or add people to it.



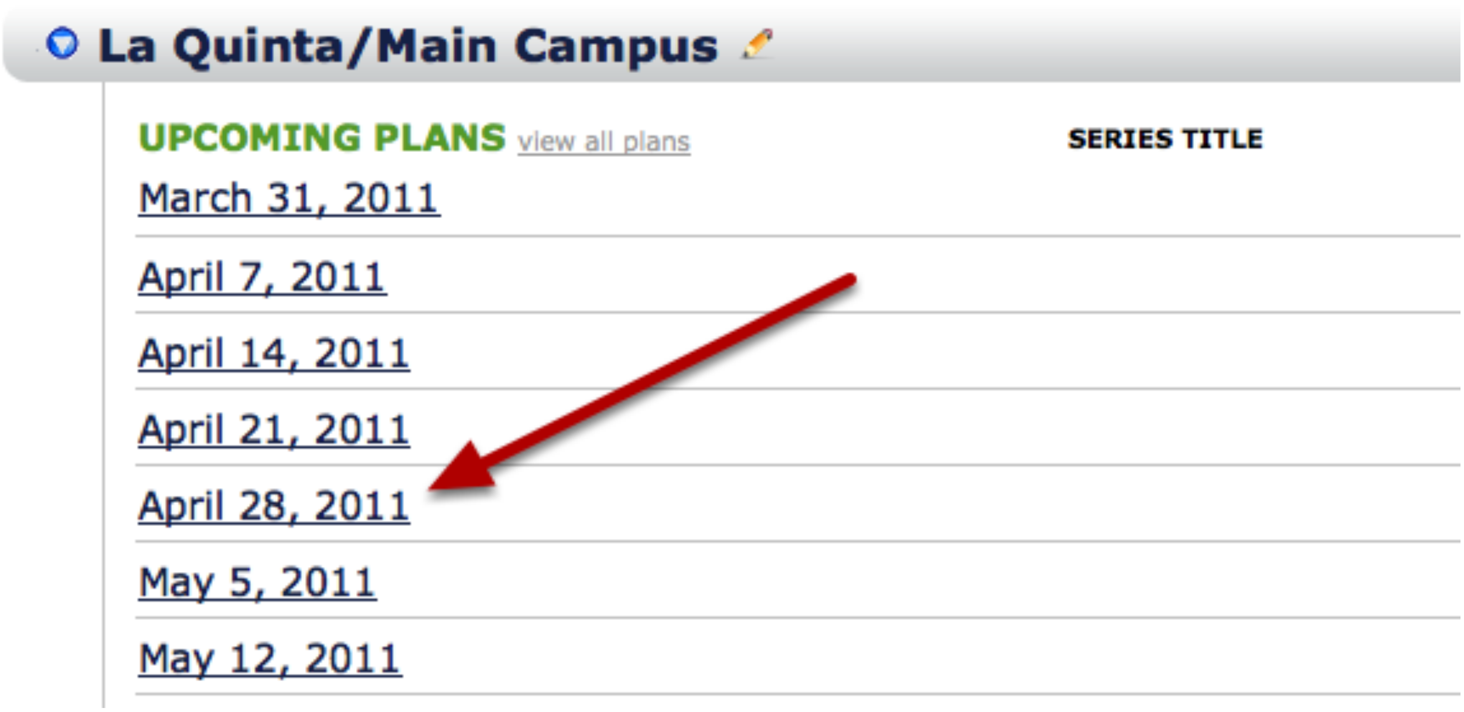
To delete, click the red X



Also, you could assign people to these properties individually

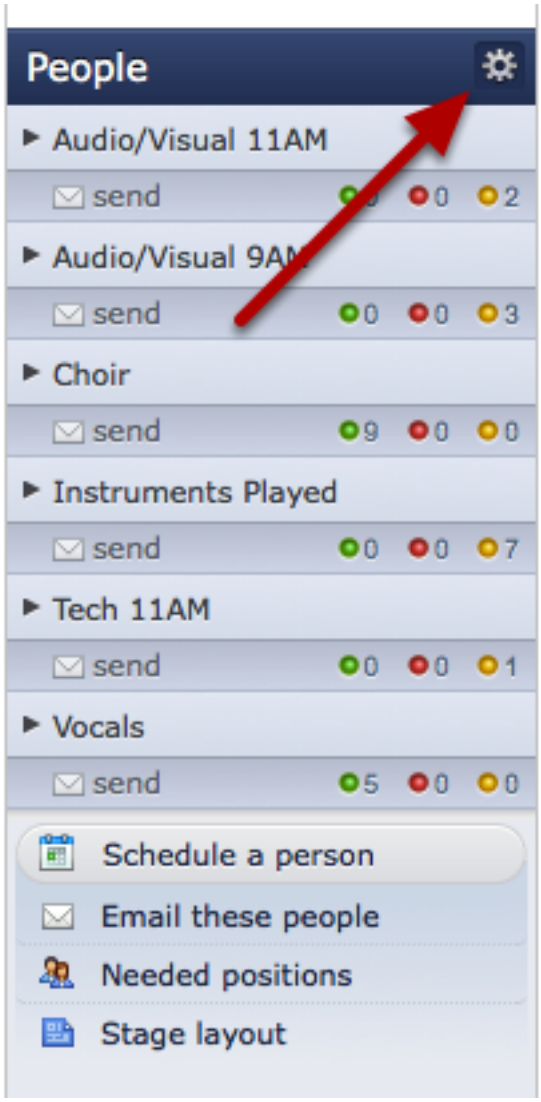
Go back to People, click on a person's name, and then on the right, you can assign properties by searching.

When finished, coordinate with categories and positions on the Plans page.



Custom Properties and Categories/Positions are not directly synced. You must add to the custom properties list and then also go to the Plans page and add the property as a category. First go back to the Plans tab, then click on a plan.

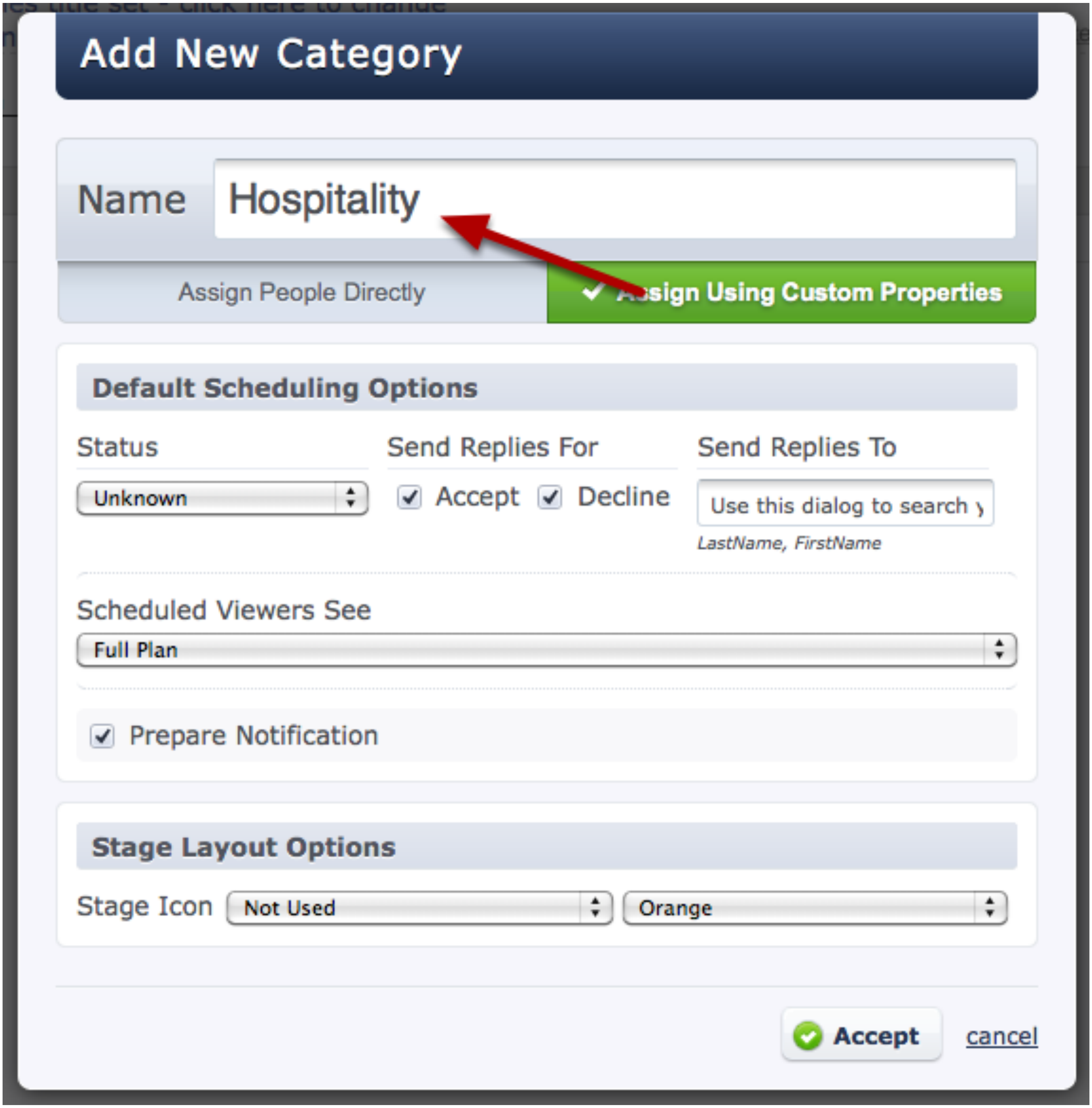
Hover over the 'People' bar, and click on the gear icon.



From here you will be able to edit your existing categories and positions.

To add a new category, click on 'add new category' in the lower left

Enter the Property name



Note: Because we are using custom properties to assign people to the positions under this category, we will need to make sure that 'Assign Using Custom Properties' is checked, and not 'Assign People Directly'.

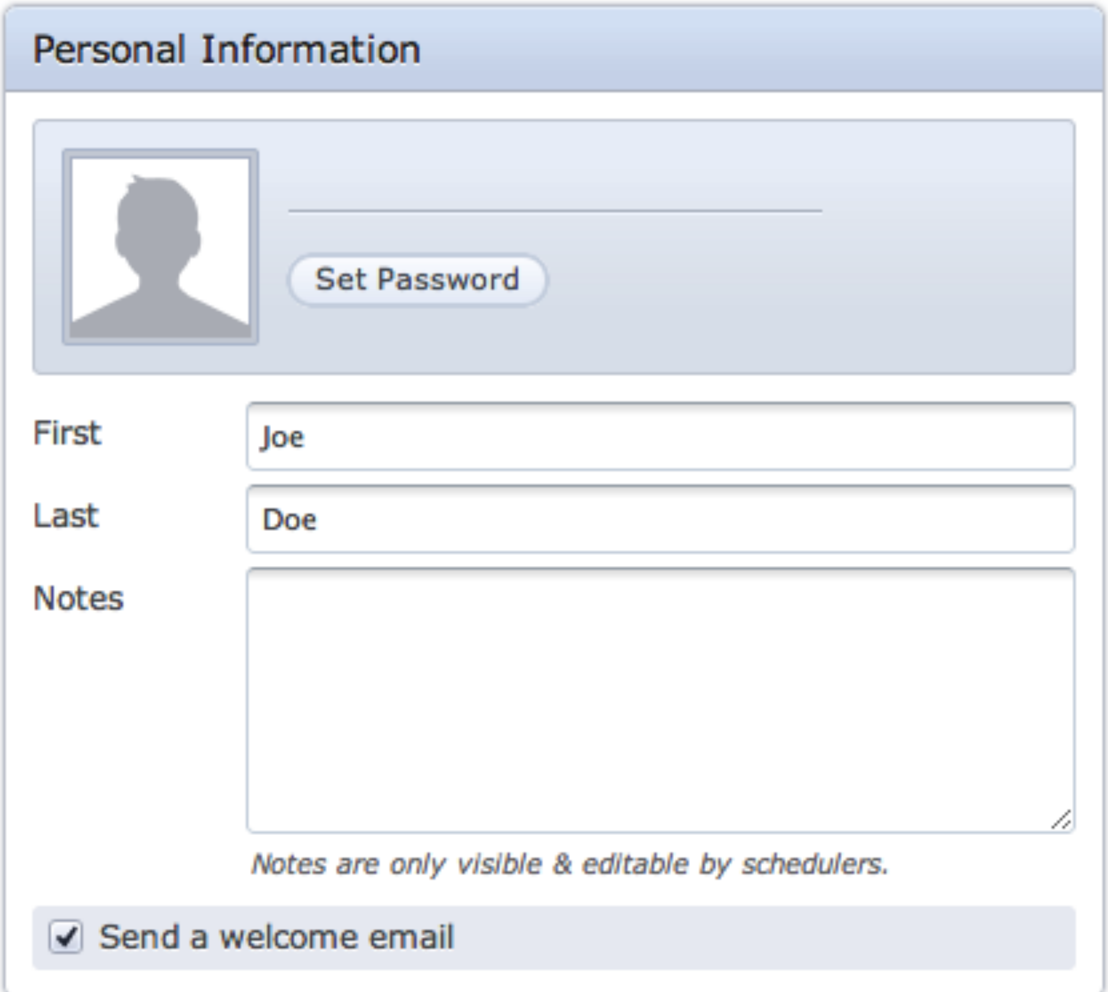
Positions will follow

If you type in the name exactly as you have it on custom properties, it will automatically pull all the options in as positions, saving you time from entering all of those positions individually. Criteria is automatically set up for you as well, drawing from those options under custom properties (for more on criteria see the lesson on setting up and editing categories)

Welcome Emails

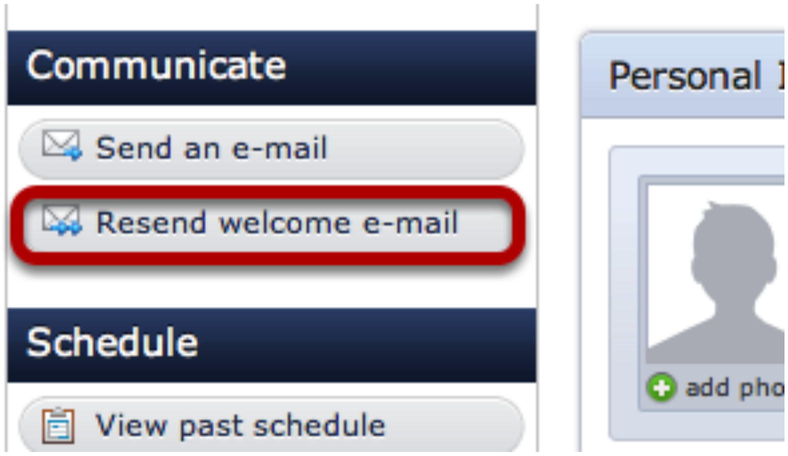
This lesson shows administrators what information is in the welcome emails and how to resend them.

When adding new people, send welcome email.



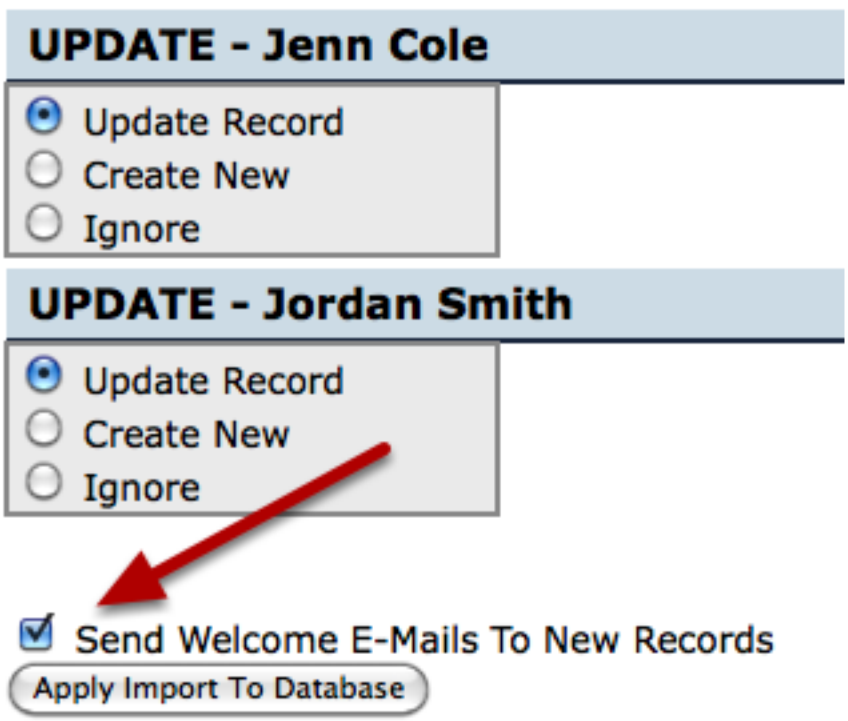
Make sure that you keep the box checked to send a welcome email. This person will need to receive one in order to have their user name and password that the system automatically generates for them. It also has a link in the email to watch a volunteer tutorial which will lay out the basic features of the site that they will need to know.

Resending welcome email.



Click on 'Resend welcome e-mail' to resend it. This is an easy way to give someone their user name and password if they've forgotten it. It's quick for you and simple for them as well. Also, if you're not sure whether or not you've already sent the email or if they have lost it, this is where you would resend it.

Importing CSV files:

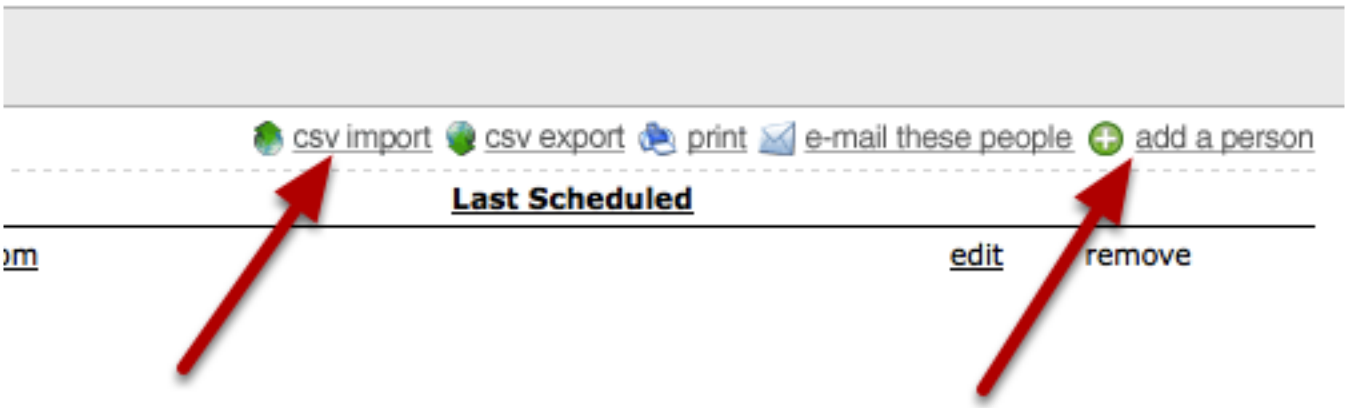


When you import a CSV file, it will by default have the box checked to send welcome emails to the new records. If you choose to uncheck the box and then continue on to import the list, you will not be able to go back and send a mass amount of welcome emails at one time. You will then have to go through each individual acount and click 'resend welcome email' in order for them to receive it. We would strongly advise that you leave the box checked when importing a big list of people through a CSV file.

Importing People using CSV files

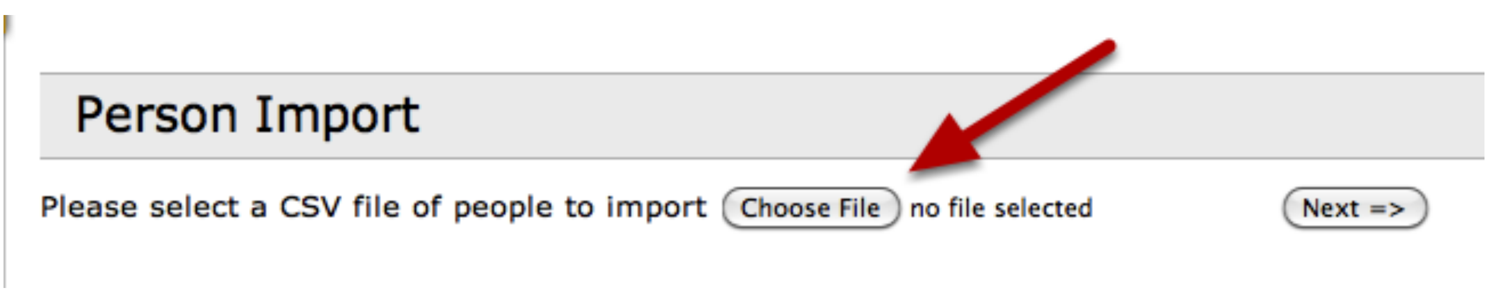
If you have a CSV file with people you'd like to import, the Site Owner can import all the people at once instead of adding each person individually.

Add People or Import Contacts



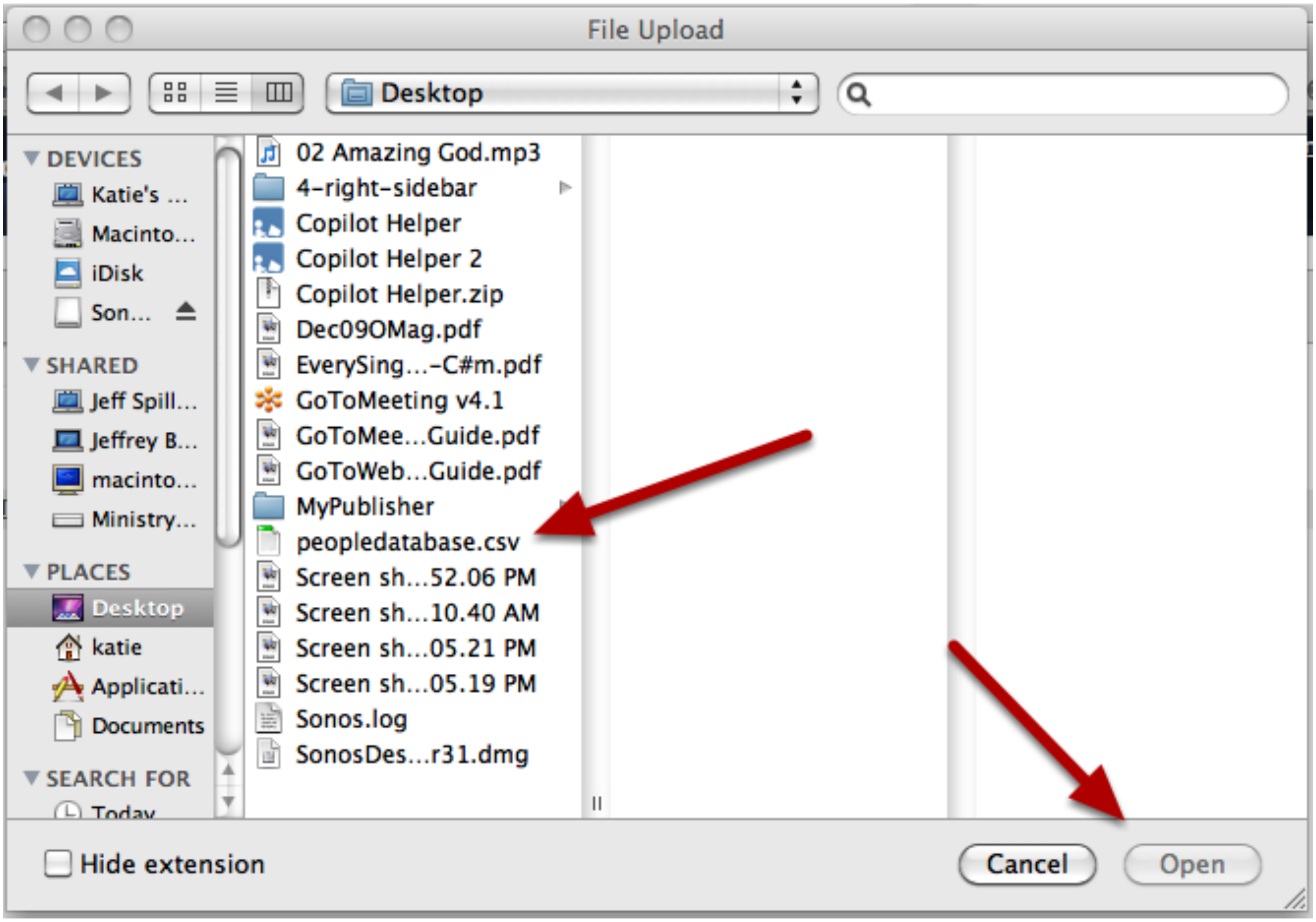
You have two options as far as adding people to your database: Add A Person (which adds one individual person at a time) or, csv import (which can import a whole list of people with their information all at once). If you choose to import your information, it MUST be in a CSV format. NOTE: ONLY OWNERS HAVE THE OPTION TO IMPORT A CSV FILE.

CSV Import



After clicking on 'csv import', you'll need to click "Choose File" to find the file on your computer.

Find file, click Open.



Select file from your computer, then click Open.

Select Next

Identify Columns, Confirm and View.

Create New records

Check 'create new' for each entry and check all information. If you want these people to receive their welcome email, leave the box at the bottom checked. If you do not want them to receive it, uncheck the box. But, keep in mind that if you do that, there's not a way to mass-send the welcome emails again. You would have to go into each individual's page to send out their welcome email.

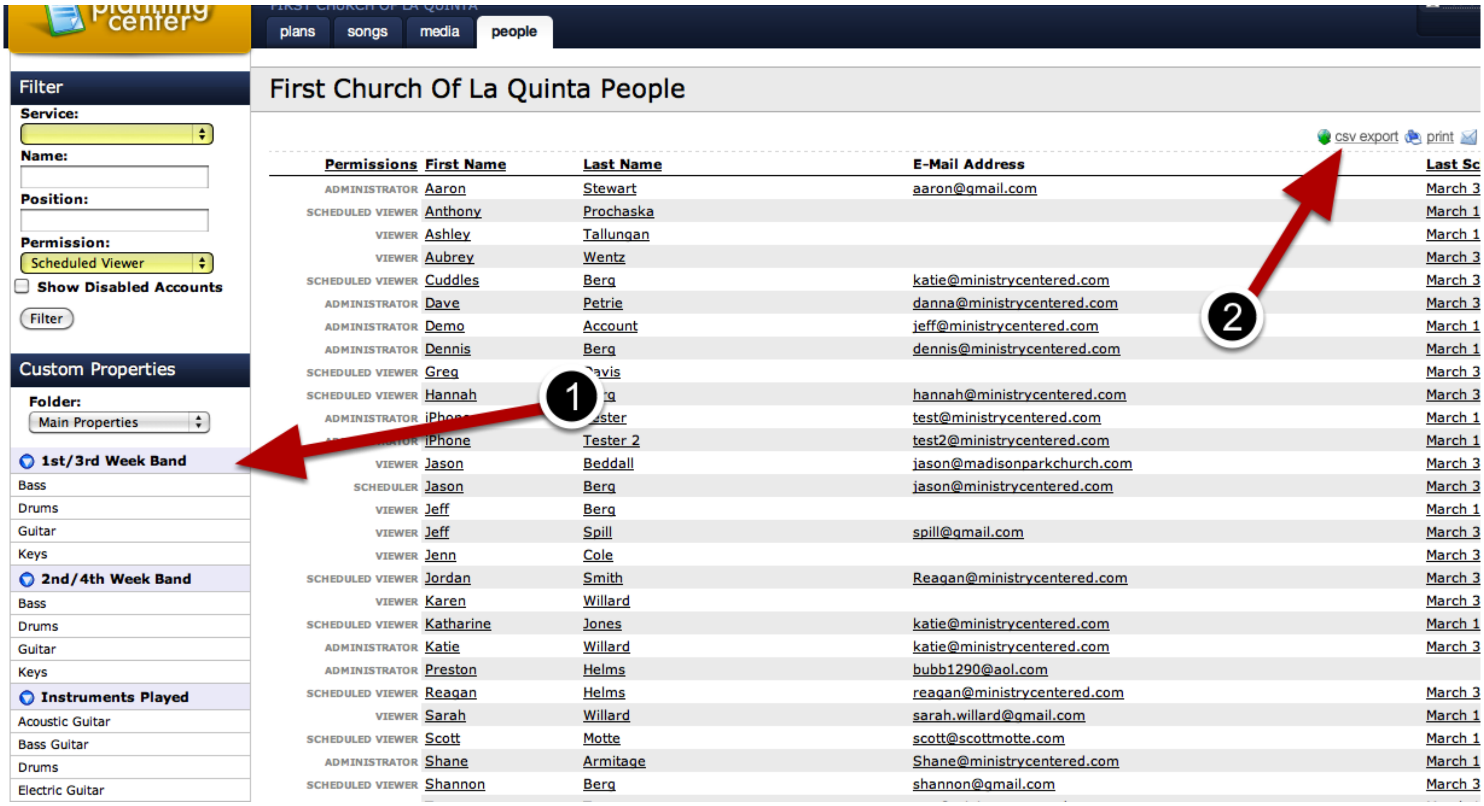
When finished click Apply Import to Database

To add an individual, see our lesson by clicking here

Exporting a CSV File

You will need to have the site permissions of Scheduler or higher inorder to have access to the CSV export link.

On the People tab

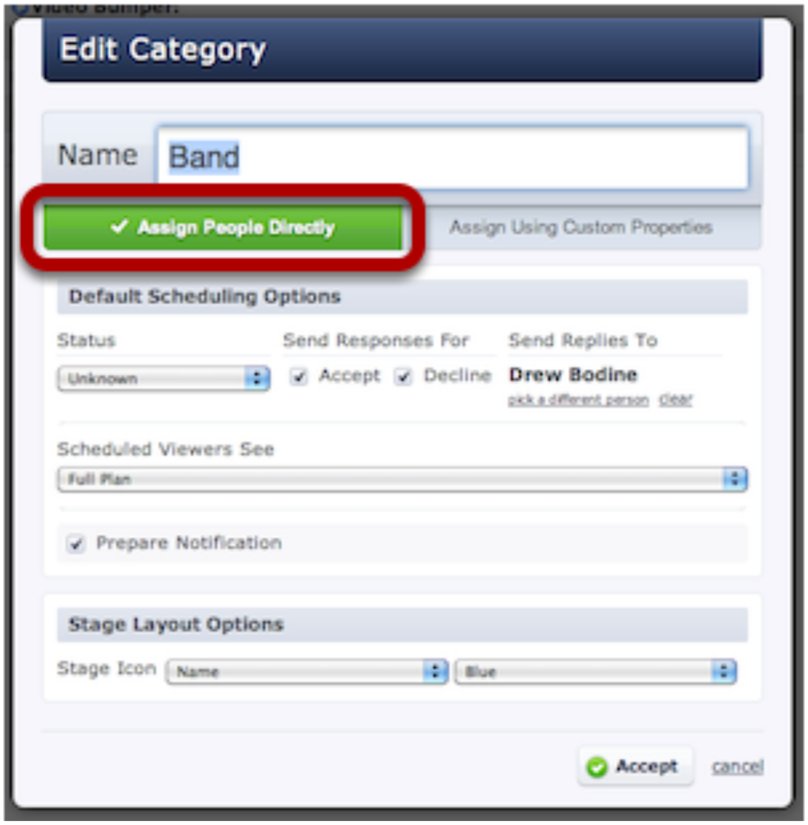


1. Filter your desired list of people on the left
2 Click on the export CSV link in the upper right

A file might download, or it might just open in your browser. If the file opens in your browser, use your browser's file, save menu to save the file to your computer as the csv file.

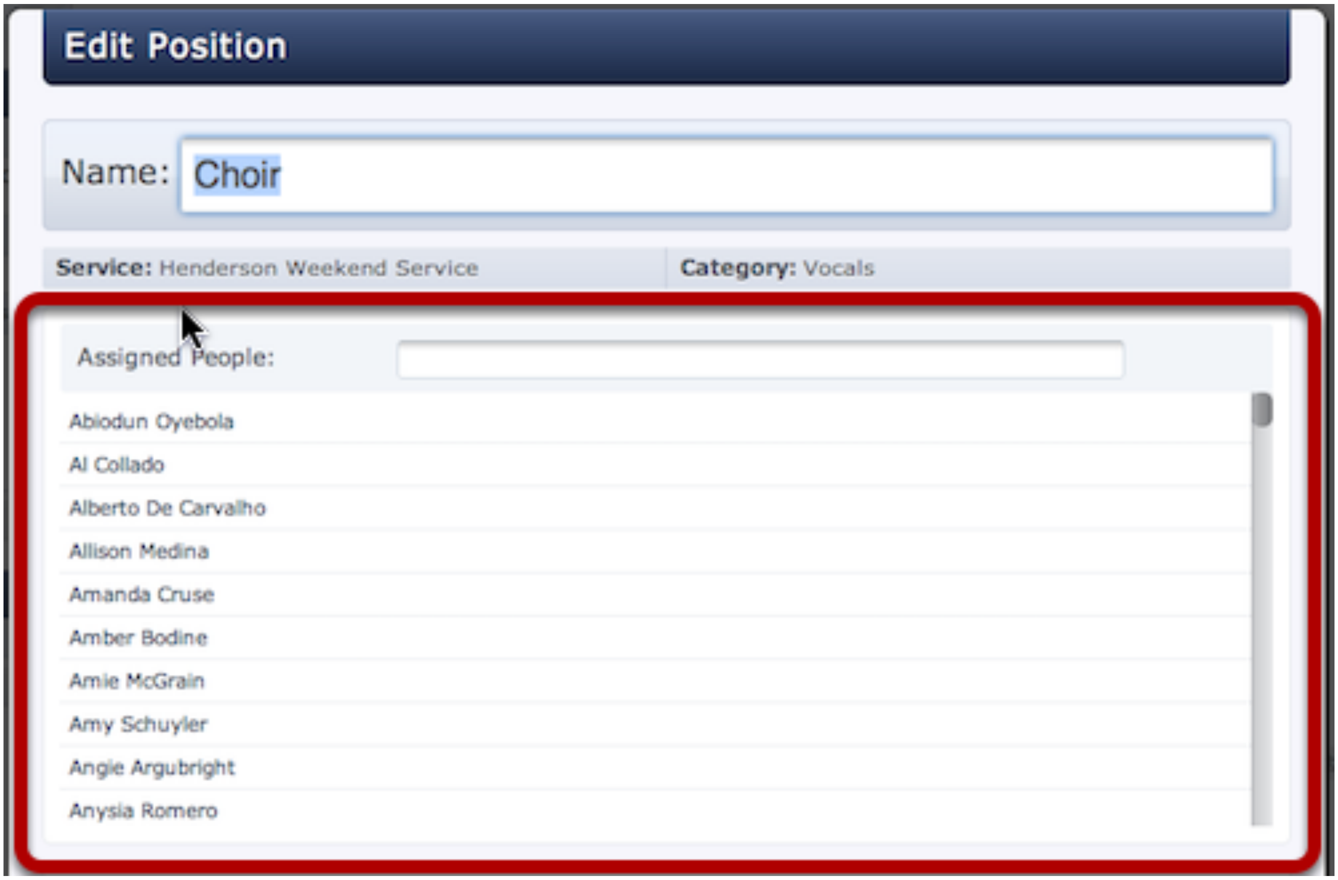
Positions: Assign People Directly vs. Assign Using Custom Properties

In most cases, Assigning People Directly to Positions is the easiest and most flexible way, but if you share positions across multiple services, Assigning Using Custom Properties can help you link them together.

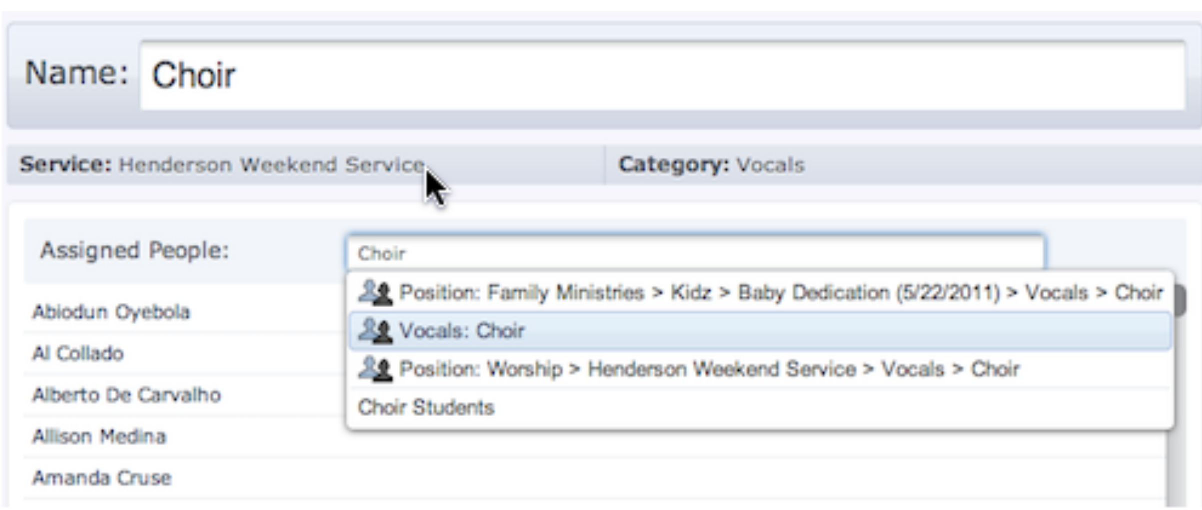


To get started, just edit the People Categories within your plan, and choose to either Assign People Directly or Assigning Using Custom Properties.

Positions: Assign People Directly

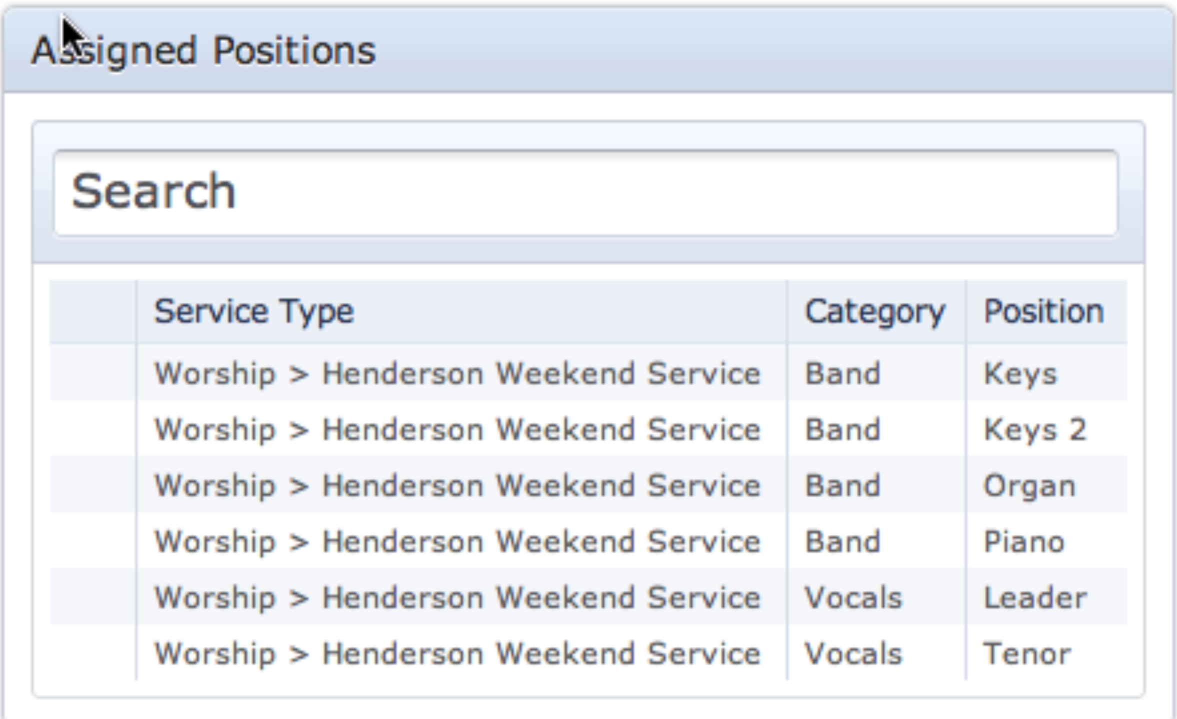


Assigning People Directly to Positions is the simplest way because you can see and edit the actual people assigned to each position right from there. Unless you have a good reason to use the other method, we recommend you Assign People Directly to Positions.

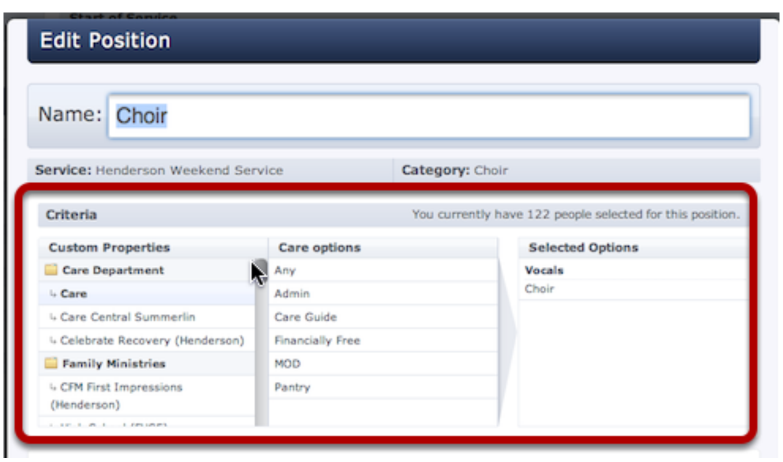


Because positions use a search box, they are much more flexible. In addition to typing a person's name, you can type the name of another position in any service to copy all the people that are assigned to that position. You can also type the name of a custom property to assign everyone with that property.

You can assign many people to your position in the edit position box shown above, or you can add a person directly to a position from their profile page using the new Assigned Positions box shown below. (Only categories that have been set to Assign People Directly will have their positions listed in the Assigned Positions search.)



Positions: Assign Using Custom Properties



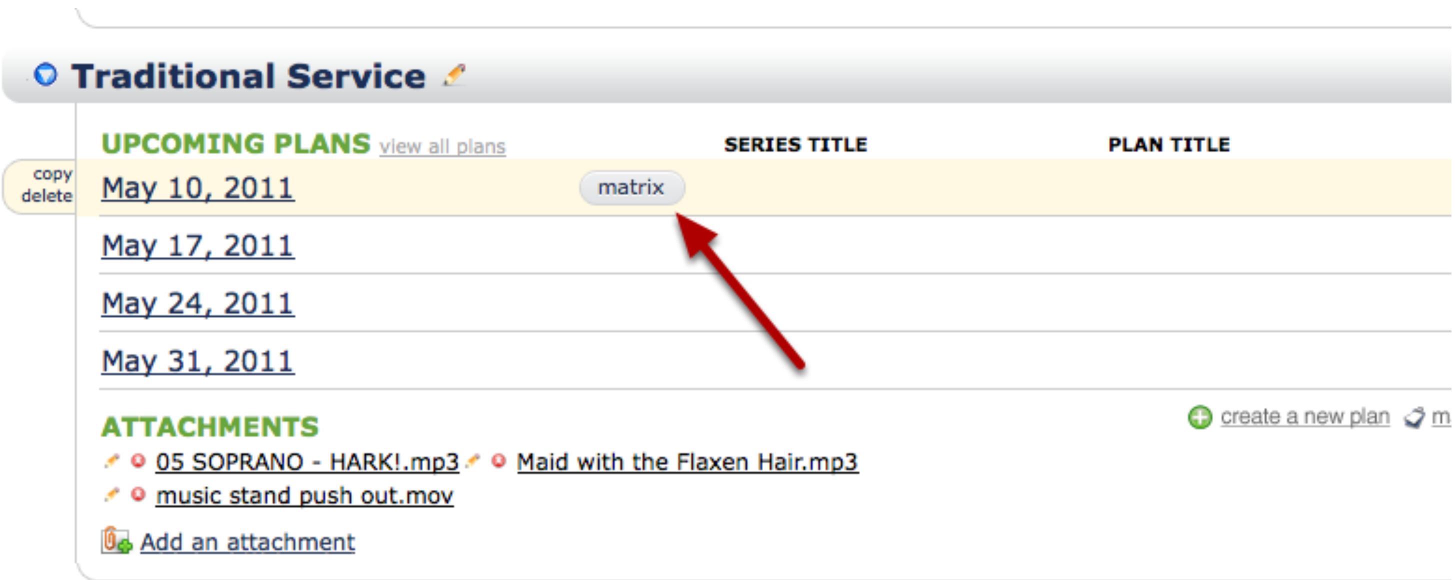
Assigning Using Custom Properties involves creating Custom Properties on the right of the main people page, assigning people to those custom properties, and then editing your service position (shown above) to link it with the appropriate custom properties using criteria.

Here's an example of when to use this method. If you have a Sunday Morning Service and a Sunday Night Service that both share the exact same band, you can assign each person to one Custom Property that is then linked to BOTH services. You would make a custom property called Main Band with these options: Drums, Bass, Guitar & Keys. Then assign each person to the correct instrument. In your Sunday Morning AND Sunday Night Services, edit your Band Category and set it to Assign Using Custom Properties. Then add the same positions: Drums, Bass, Guitar, & Keys. When you click and edit each of those Positions, set the criteria so that they link with the Custom Properties you already created. From now on, when you assign a person to the Custom Property: Main Band - Drums, it will be linked to your Sunday Morning and Sunday Night services.

Auto-scheduling

Autoscheduling will automatically fill in needed postioins based off of who hasn't been scheduled the longest, and avoiding conflicts and block-out dates.

Load a Matrix

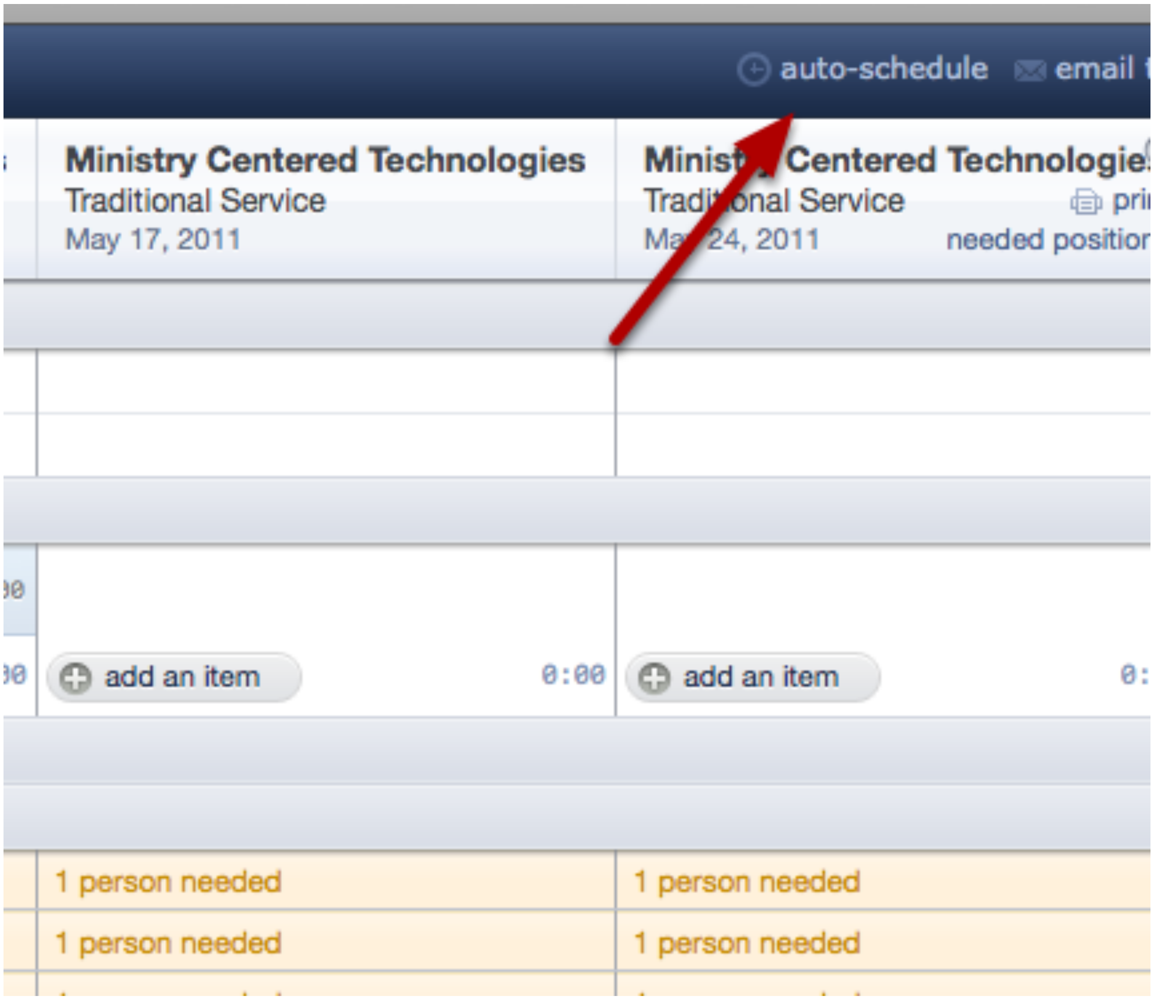


Note: This can be done from various places in Planning Center with different options. For a list please see our lesson on Setting Up The Matrix

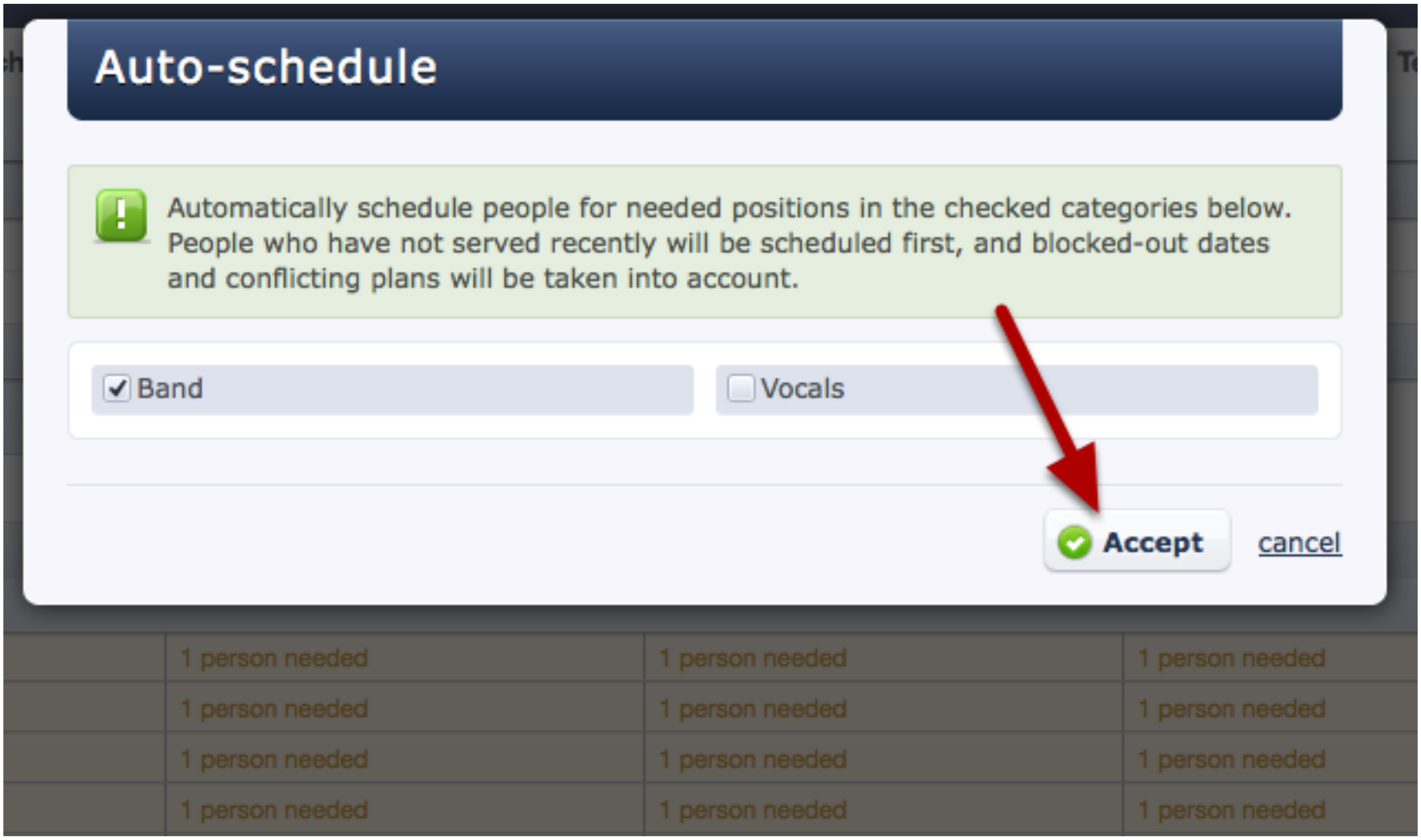
Make sure that you have the correct number of needed positions set up for each plan

Hover over each plan date, and click on the needed postions link to set those up. For more info see our Setting Up Needed Postions lesson

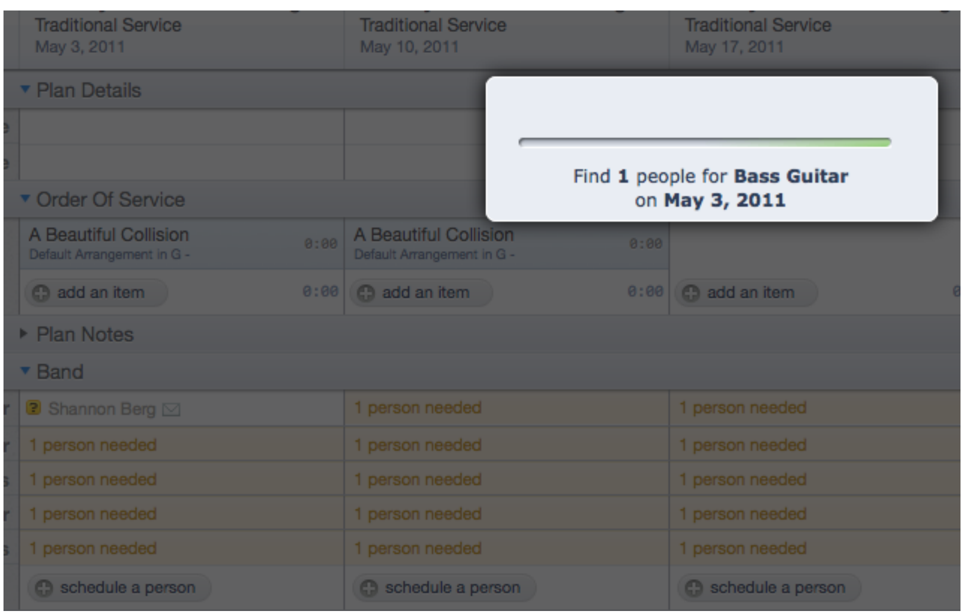
Once Needed Postions are set up, click on the 'auto-schedule' link



Check which categories you would like to auto-schedule for, then click 'Accept'

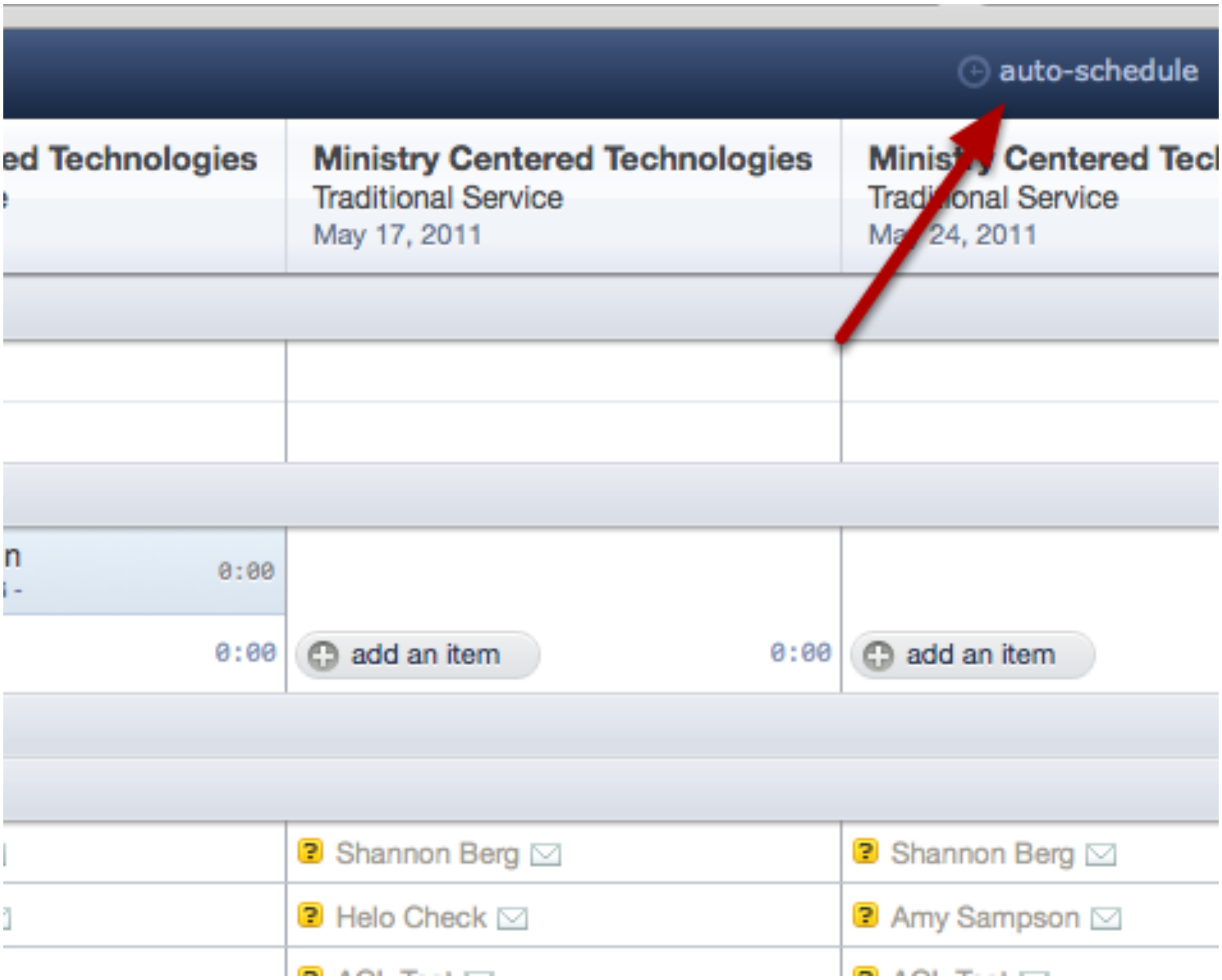


Auto-scheduler will then do the rest!

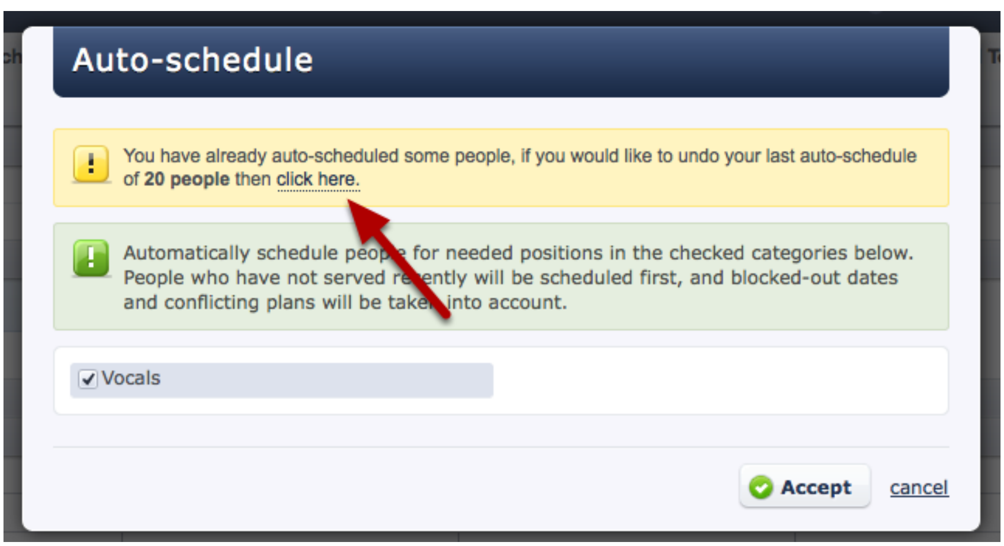


It will fill your needed postions based off of the person who hasn't been scheduled the longest and avoid conflicts and blocked-out dates. If it doesn't fill some of your positions, it is because everyone has a conflict or blocked-out date.

To undo auto-scheduling, click on the auto-schedule link again



Then click the link in the yellow box

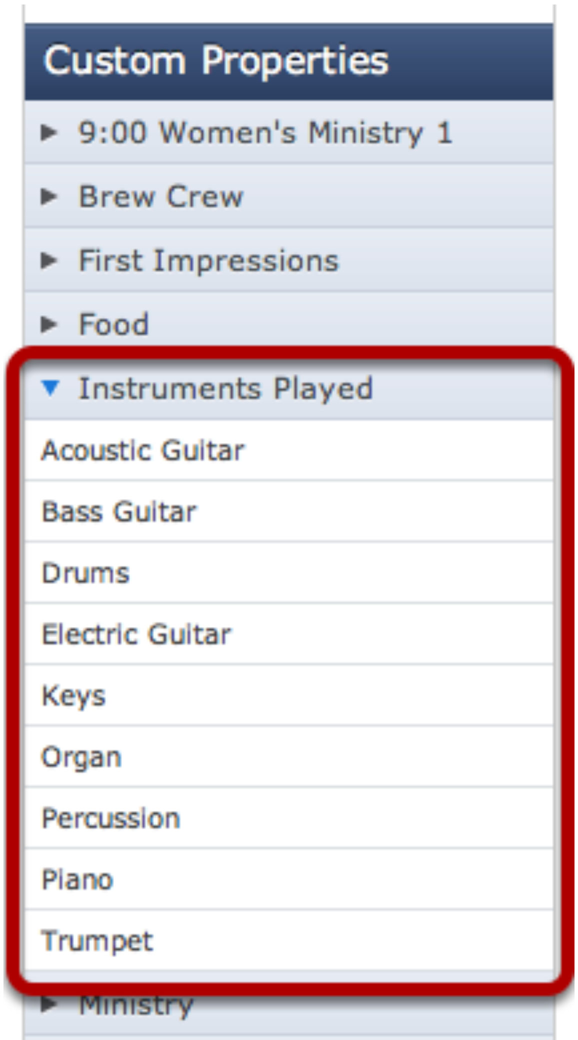


If your positions are setup with Primary People and Alternate Subs, read our lesson on Setting Up Backup People for Positions

Setting Up Back-Up People for Positions

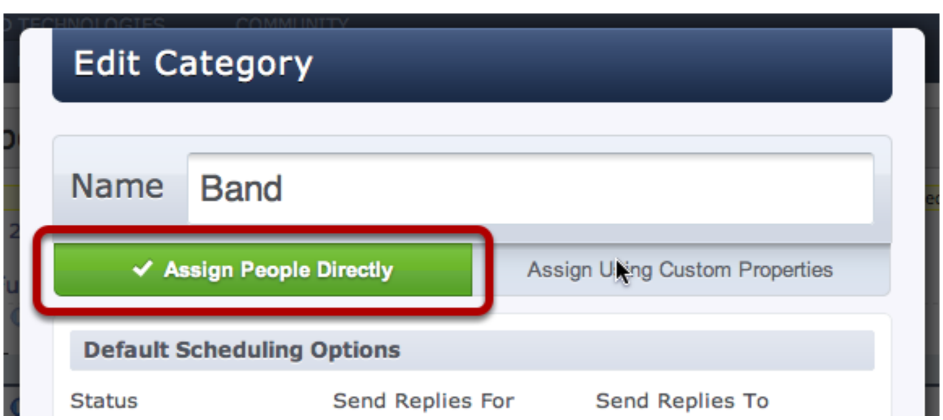
If you have people you want to schedule for a position only when all your other people are unavailable, you can get creative and use a combination of Needed Positions and Custom Properties to set this up. This is especially helpful if you want to use Auto-Scheduling in the Matrix, but you want it to only choose your primary people.

Setup ALL People Using Custom Properties

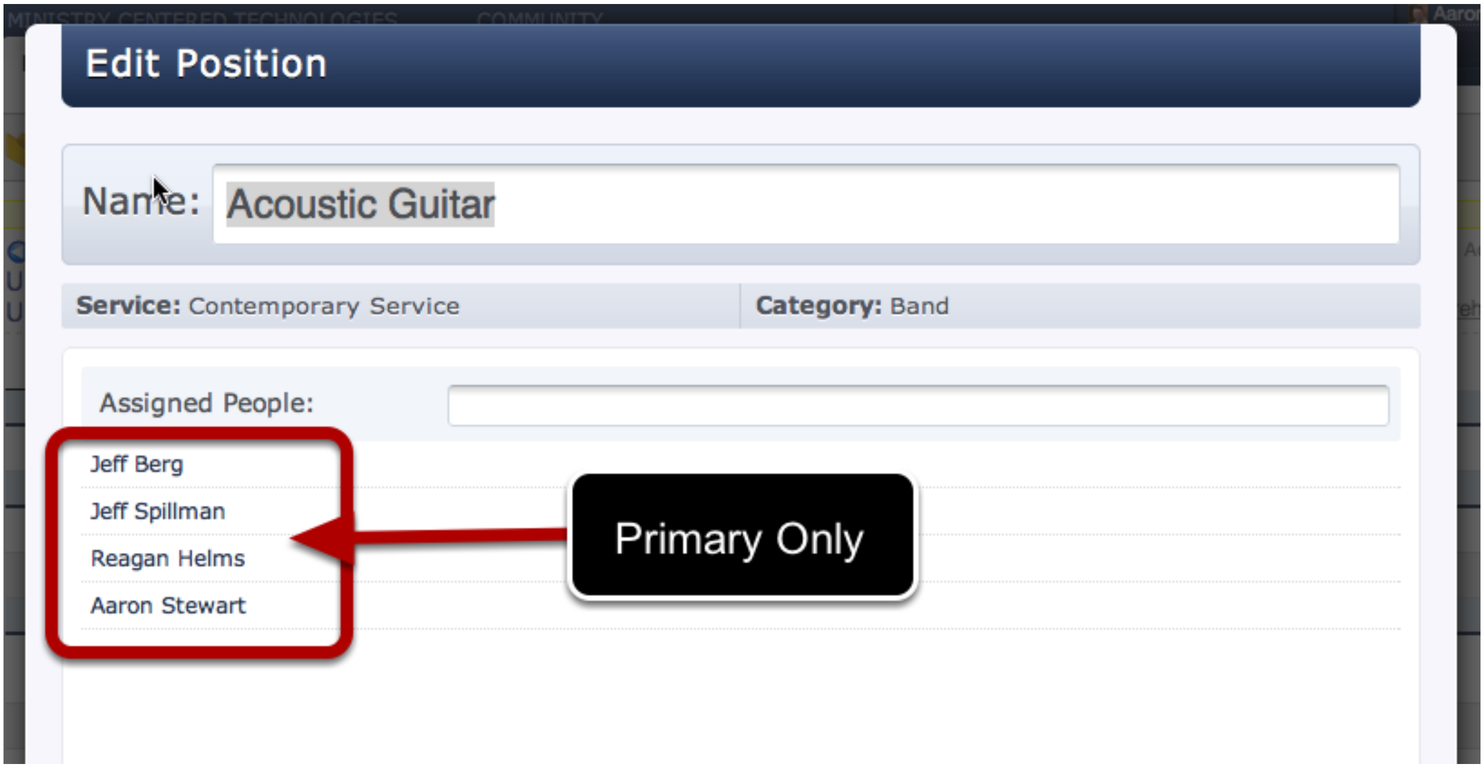


On the left of the main people page, create a Custom Property for each Position and then assign ALL applicable people to that property (Primary and Backup).

Assign Primary People Directly to Positions in your Service

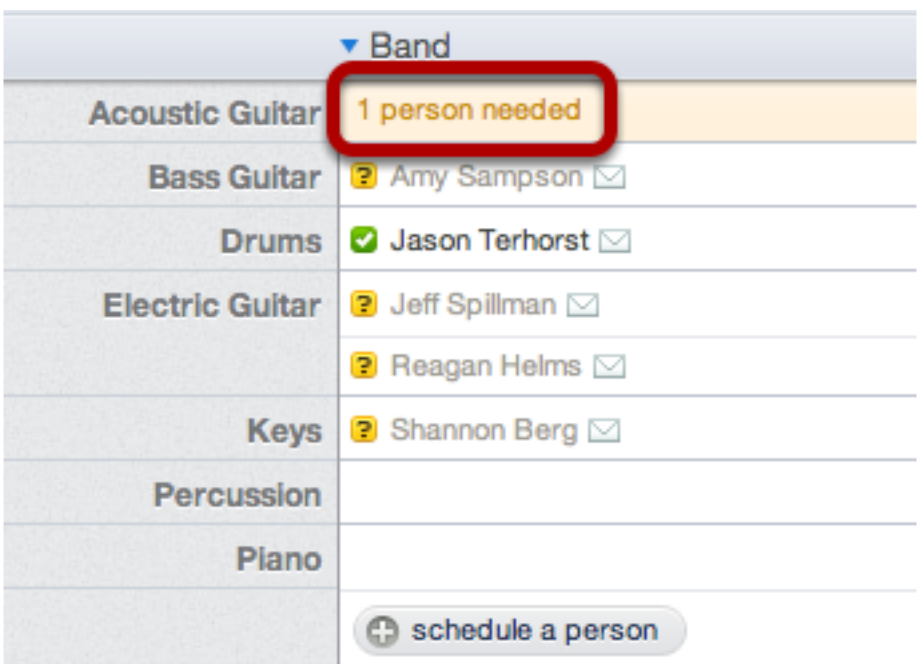


From any plan in your service edit your People Category and make sure to choose "Assign People Directly"

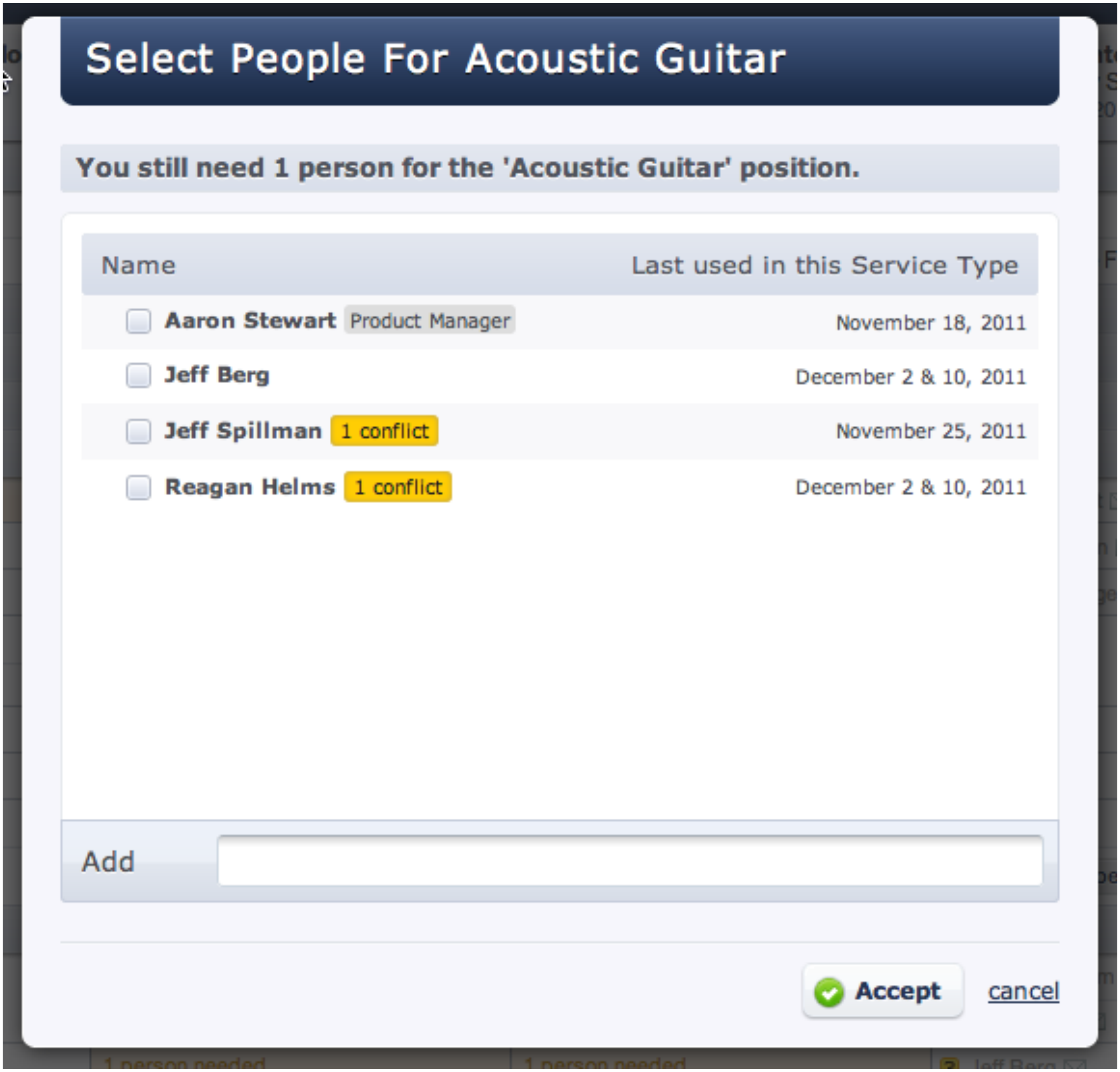


Next edit your positions in that Category and ONLY add your Primary people for that position. Don't add any of your backup people. If you plan to use Auto-Schedule from the Matrix, it will schedule anyone listed in this box, so we are excluding the alternate people.

Schedule Your Primary People



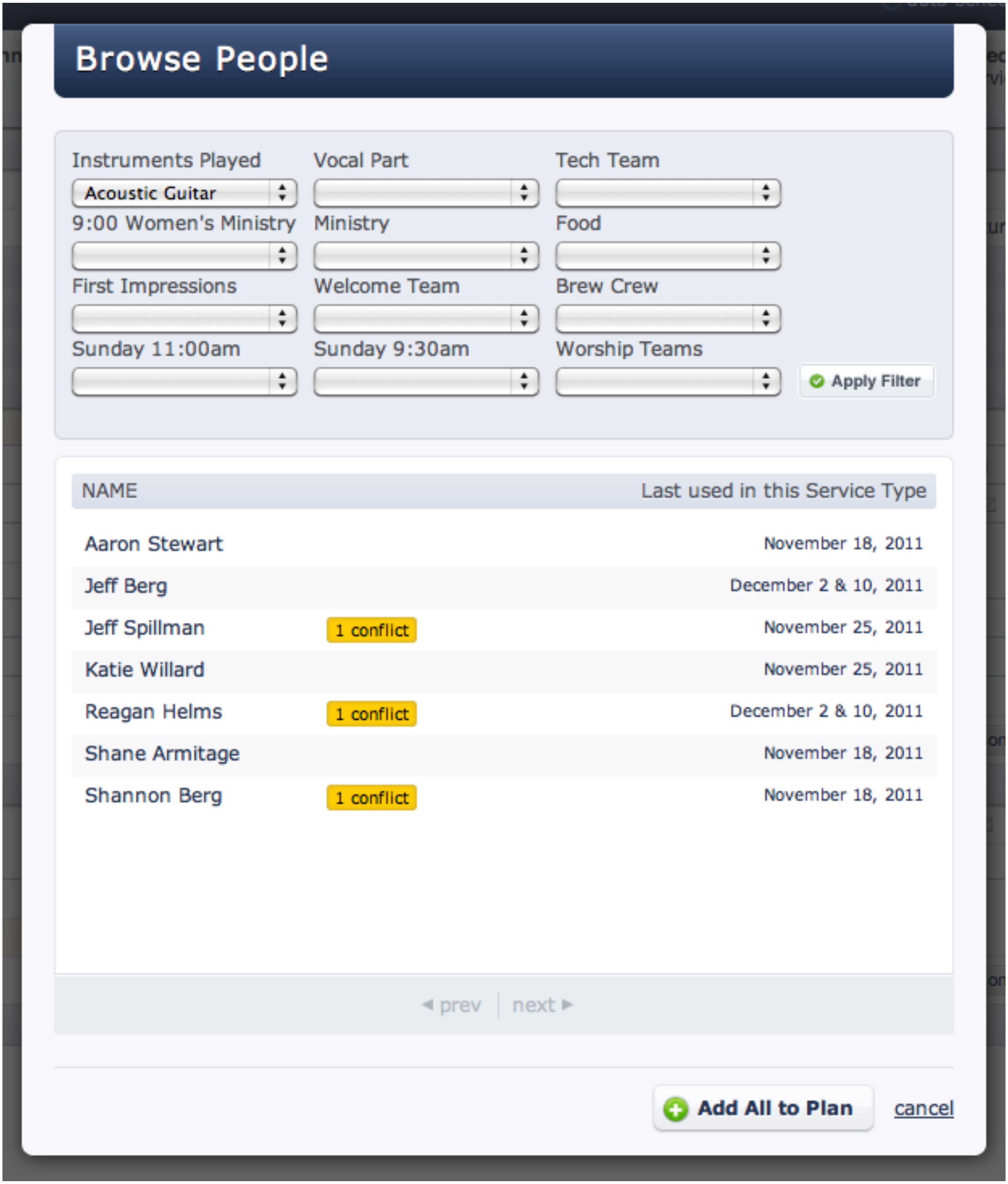
When scheduling, click on "1 person needed" to do your regular scheduling and see your list of primary people.



Since these primary people are the only ones technically setup for this service position, when you use Auto-Schedule, it will only choose these people for this position.

Schedule Backups When Needed

Hopefully, scheduling backup people shouldn't be a regular occurence, so when you need to, skip the needed positions box, and click "Schedule a Person". Then instead of typing a person's name, type the name of the Custom Property you created that lists ALL you people.



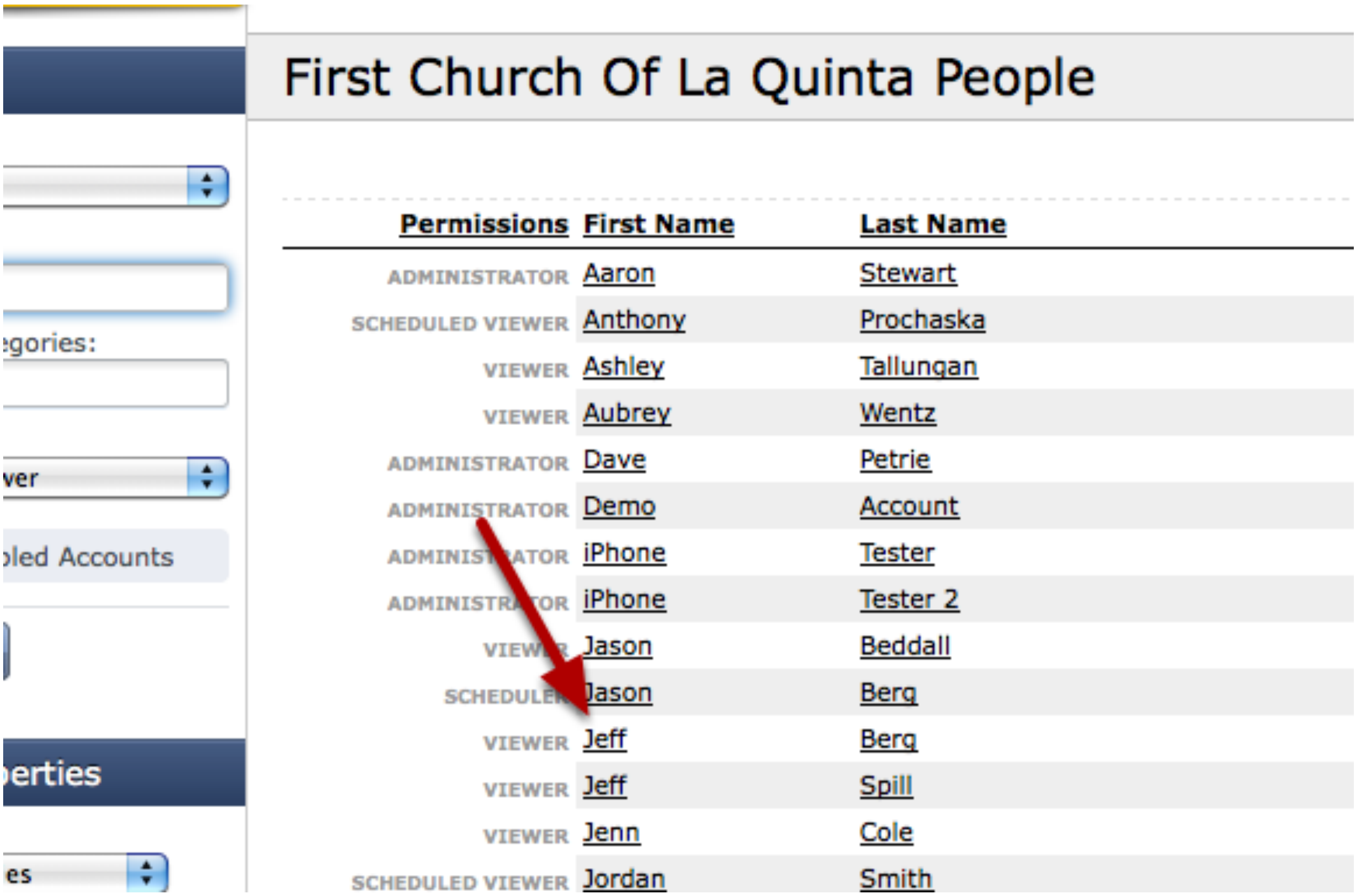
Or click the browse button and choose your property from the list. Either way, once you've chosen and filtered by your Custom Property, you will see all of your people, primary and backup, and can choose one of your backup people by cliking on them.

Disabling Users

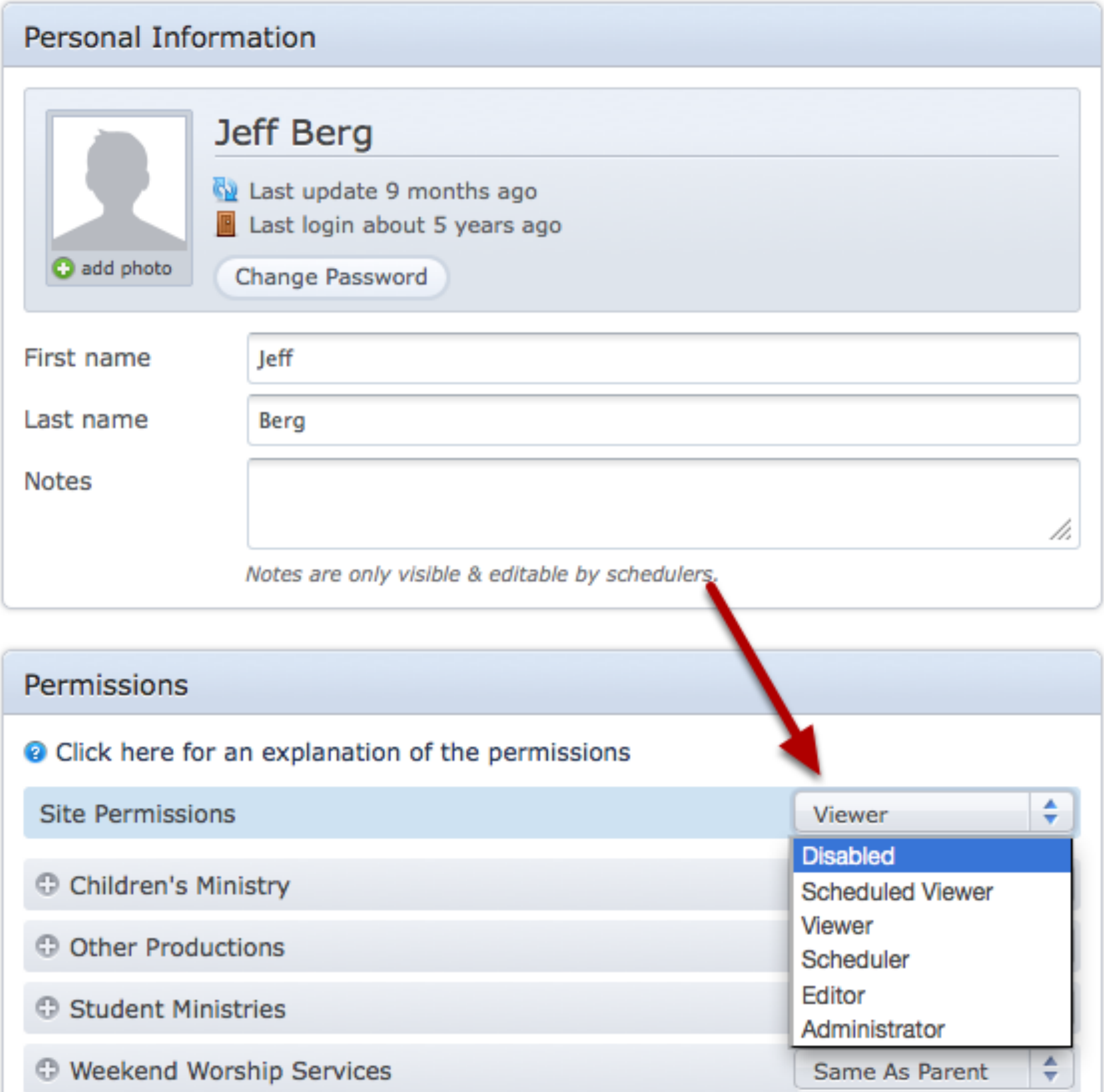
This is a lesson that will show you how to disable a user in your account that doesn't need to be scheduled or emailed any longer, but still needs to exist in your account for reference purposes, and won't be able to login.

First click on the 'people' tab

Then click on the name of the person you would like to disable



And change their 'Site Permission' to 'Disabled



This will prevent them from accessing the site and will hide this user from schedulers and prevent them from being emailed while still holding their history and records in your account for reference purposes.
For information on how to enable a disabled user, see our manual entry on Enabling Users

NOTE: Disabled people don't count against your maximum number of users for your account.

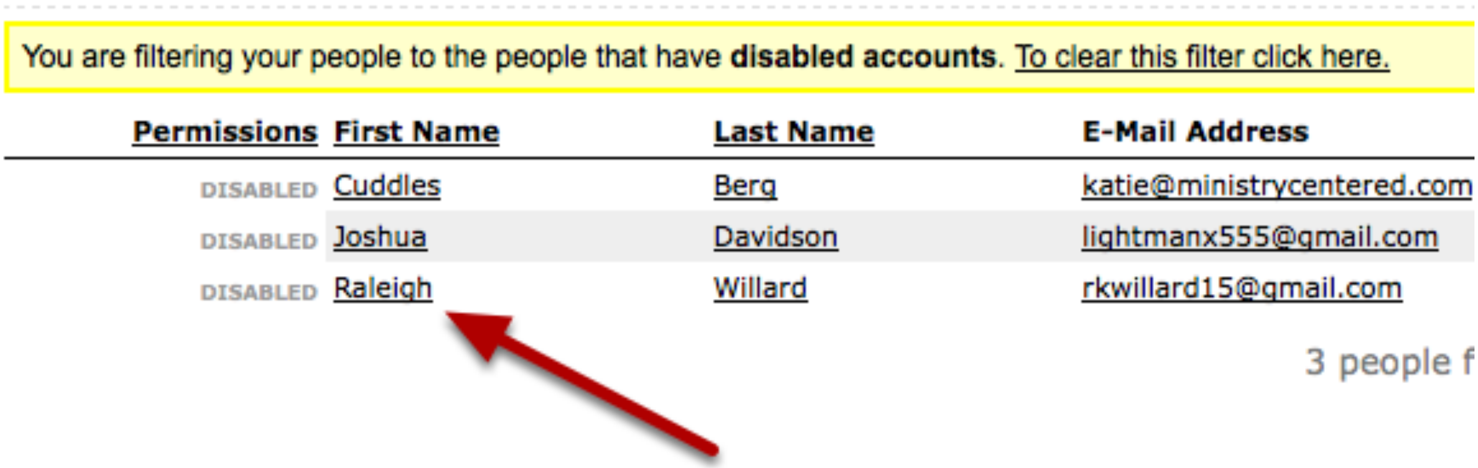
Enabling Disabled User Accounts

This lesson will show you how to Enable a User that exists in your account, but has been disabled in the past.
(a possible solution if you are getting a 'Duplicate Person Error' while trying to enter a user).

First click on the 'people' tab

Check the 'Show Disabled Accounts' box, then click 'Apply Filter'

The list shown will be of all the disabled users in your account, click on a name to view their profile.



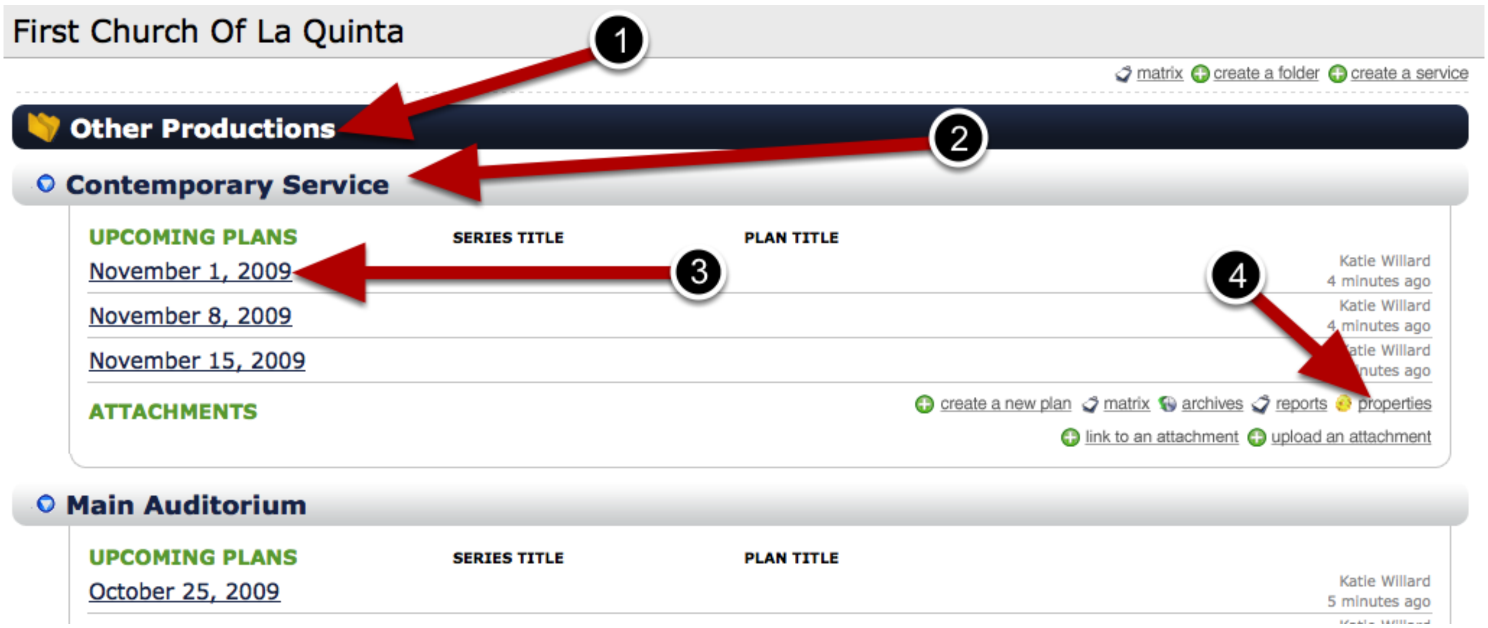
Change their permissions from 'Disabled' back to the desired postion.

Plans

The Plans Page (Dashboard)

The main Plans page, or Dashboard, is where you navigate through all your Service Types and Folders to access individual plans. This lesson explains the different parts of the Dashboard.

Anatomy of the Plans Page

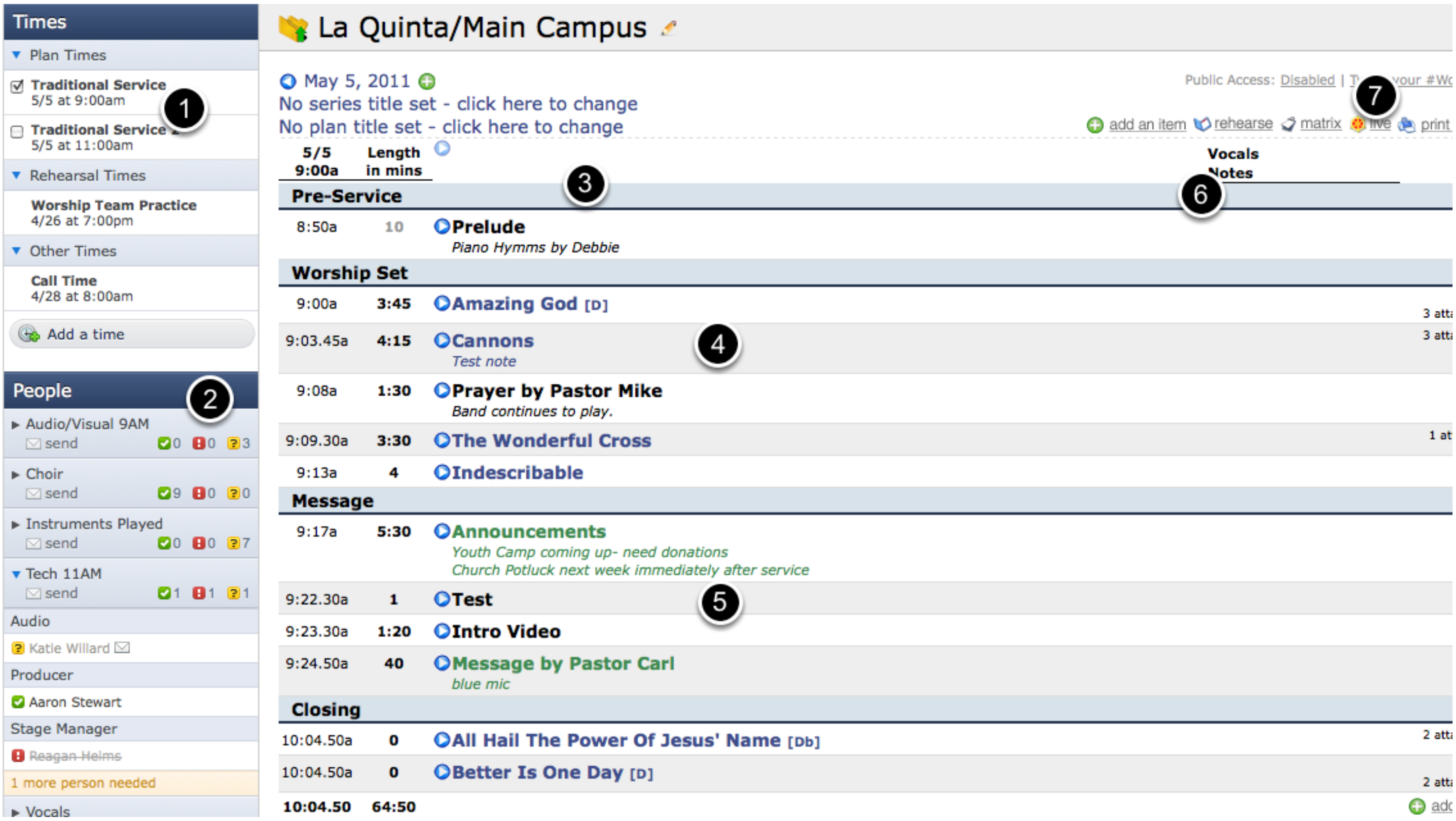


1. **FOLDER**- a folder contains services and is there simply for organizational purposes. You could create as many folders as you wanted to and place your services in them, but they are simply there to organize your Plans page. A good example of using a folder would be to have one titled "Student Ministries" and then within that folder, have services called "High School Ministry", "Jr. High Ministry", and "College-Age Ministry".
2. **SERVICE**- a service is the main area in which you will plan for one particular service that happens throughout your week. As shown above, there are two service types listed: Contemporary Service, and Main Auditorium. These are the service types referred to in our pricing structure.
3. **PLANS**- a plan is an individual service flow that is usually created on a weekly basis. It contains all of the scheduled people and items for that particular service day. Any plans that you are scheduled in will be shown in bold.
4. **PROPERTIES**- the properties page is where you will find all settings pertaining to that particular service. Only Administrators will see this button.

Individual Plan Pages

This lesson explains the different parts of your indivual plan pages.

Inside a Plan.

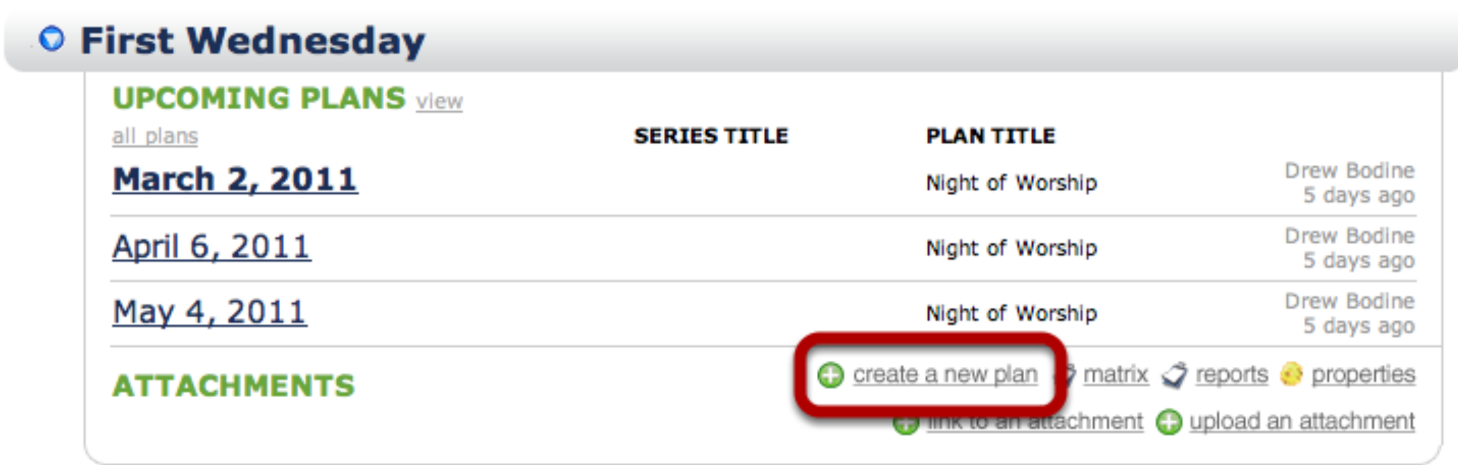


1. **Times:** This area is the Times box. It allows you to edit your current dates/times and add new ones.
2. **People Categories:** The categories that are scheduled in this plan are: Audio/Visual 9AM, Choir, Instruments Played, and Tech 11AM. Each category can expand (as shown with Audio/Visual 9AM) and then show the positions.
3. **Headers:** "Pre-Service", "Worship Set", "Message" and "Closing" are examples of headers in this plan. They do not have any time associated with them. They are just there to organize the plan flow.
4. **Songs:** Songs that are added from your Songs database are always listed in blue.
5. **Items:** Items are any other thing you want listed in your plan flow that are not specific to songs or media, and that do need a time (unlike a header). Two examples would be Prelude, and Prayer by Pastor Mike.
6. **Item Note Categories:** You can arrange your own and have them display in the plan or not display in the plan.
7. **Planning Center Live** is a feature that allows you to run a live countdown of the service as it's actually happening, and keep track of which items took what amount of time.

Adding a One Time Special Service

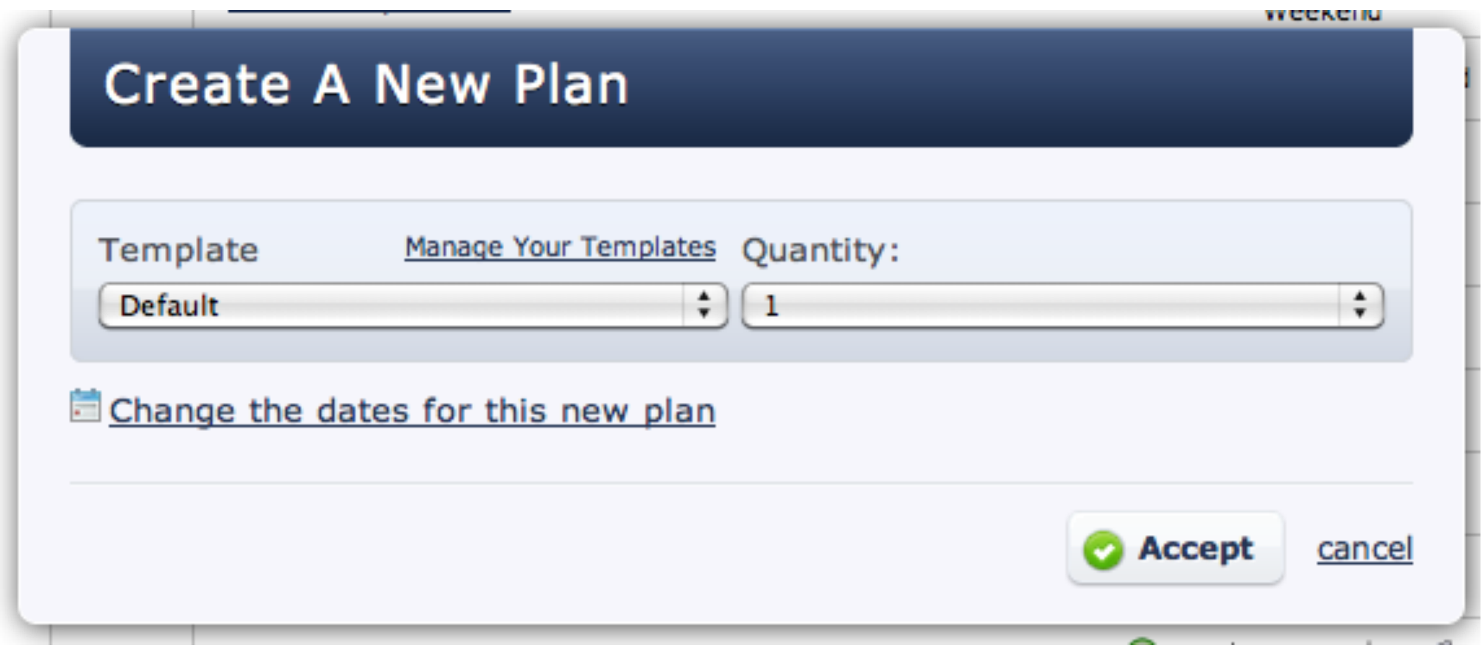
You can add 1 time special services to your service type when you have special events like Christmas or Easter.

Click the link to create a new plan



From the main plans page, click create a new plan.

Add at least 1 new regular plan.

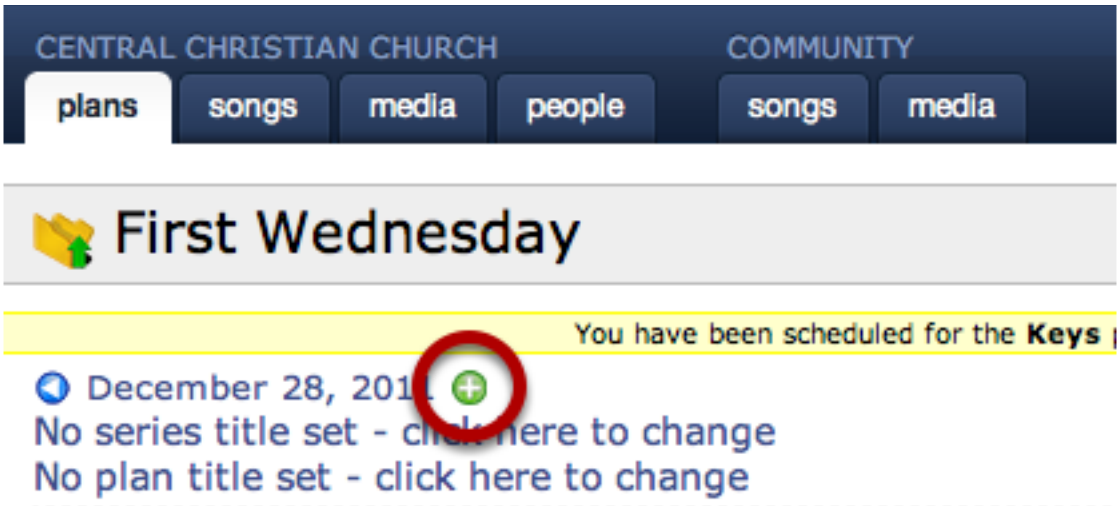


First of all, let's assume we need to add a special Christmas Eve service. When Planning Center adds new plans, it copies all the times from the last plan in the list. If we add our Christmas Eve plan to the end of the list, then when we are ready to make a new one, it will copy the times from

Christmas Eve instead of our regular service. So to prevent that, we will make 2 new plans. The first one is the next "regular" service AFTER Christmas Eve, and the second one is the Christmas Eve plan.

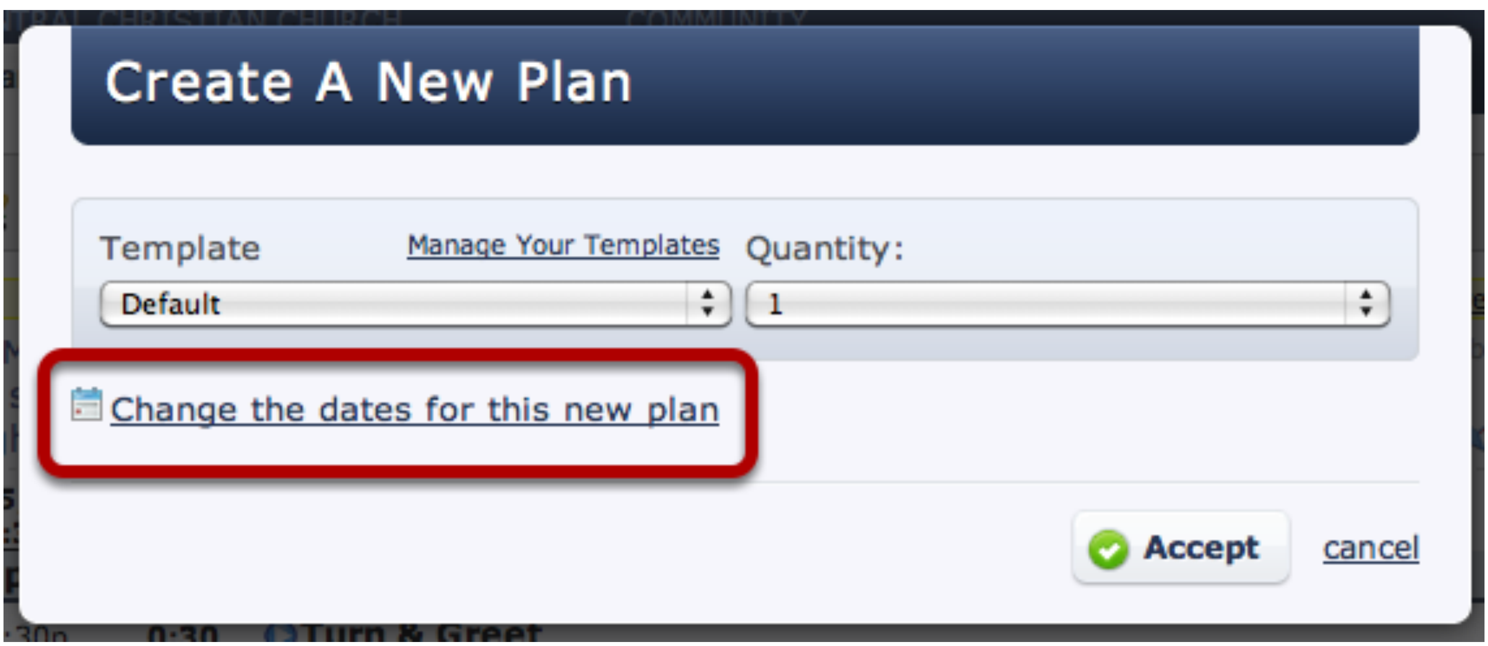
If you already have your next regular plan, you can skip this step.

Now add your Special plan



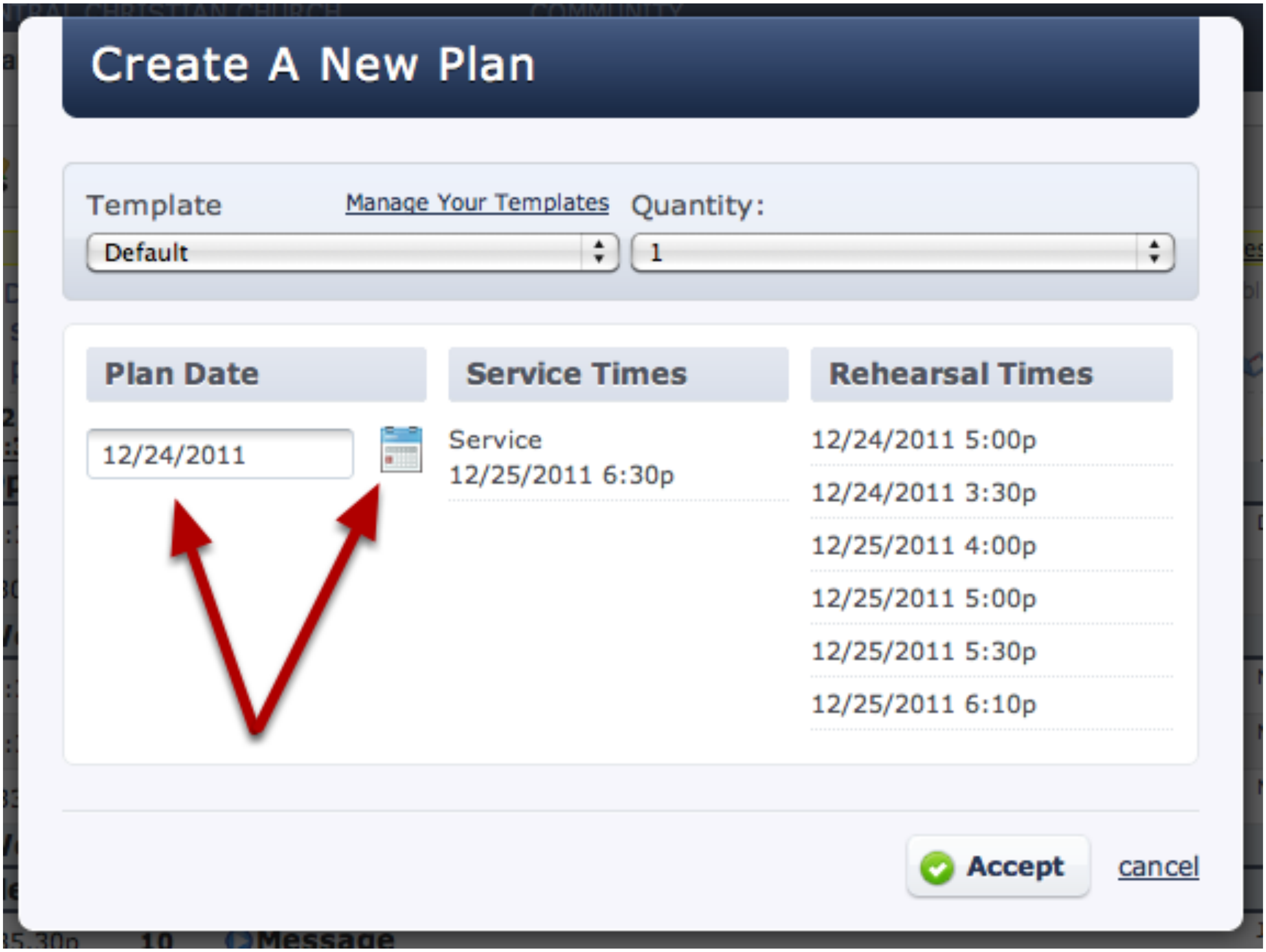
From your new plan, click the plus icon next to the main dates to add a new plan

Click "Change the dates for this new plan"



This will allow you to set the master plan date before the plan is made so that all other times are created relative to the master plan date.

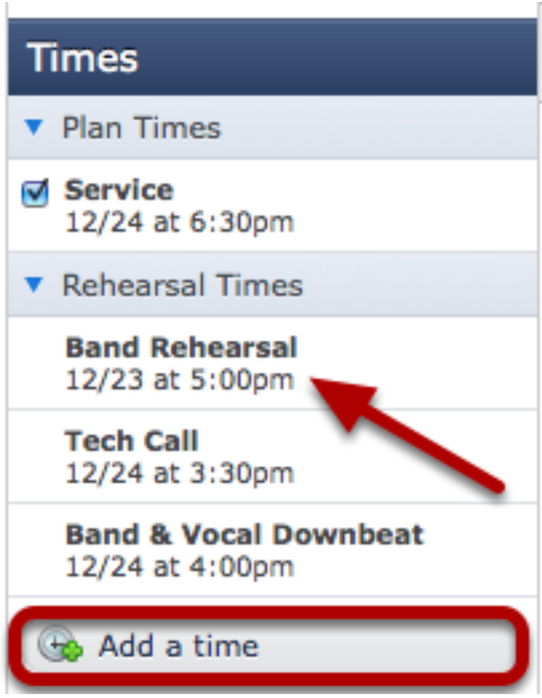
Enter the plan date for the special plan



Type the date or click the calendar icon to choose a date. Once your date has been chosen, you will see any other times reflect this change.

When you are done, click accept.

Modify any of your times



You are taken into your new Christmas Eve plan that is not the last plan in the list since we've already created the plan after this one. Modify any of your times by clicking to edit them, or by adding new times.

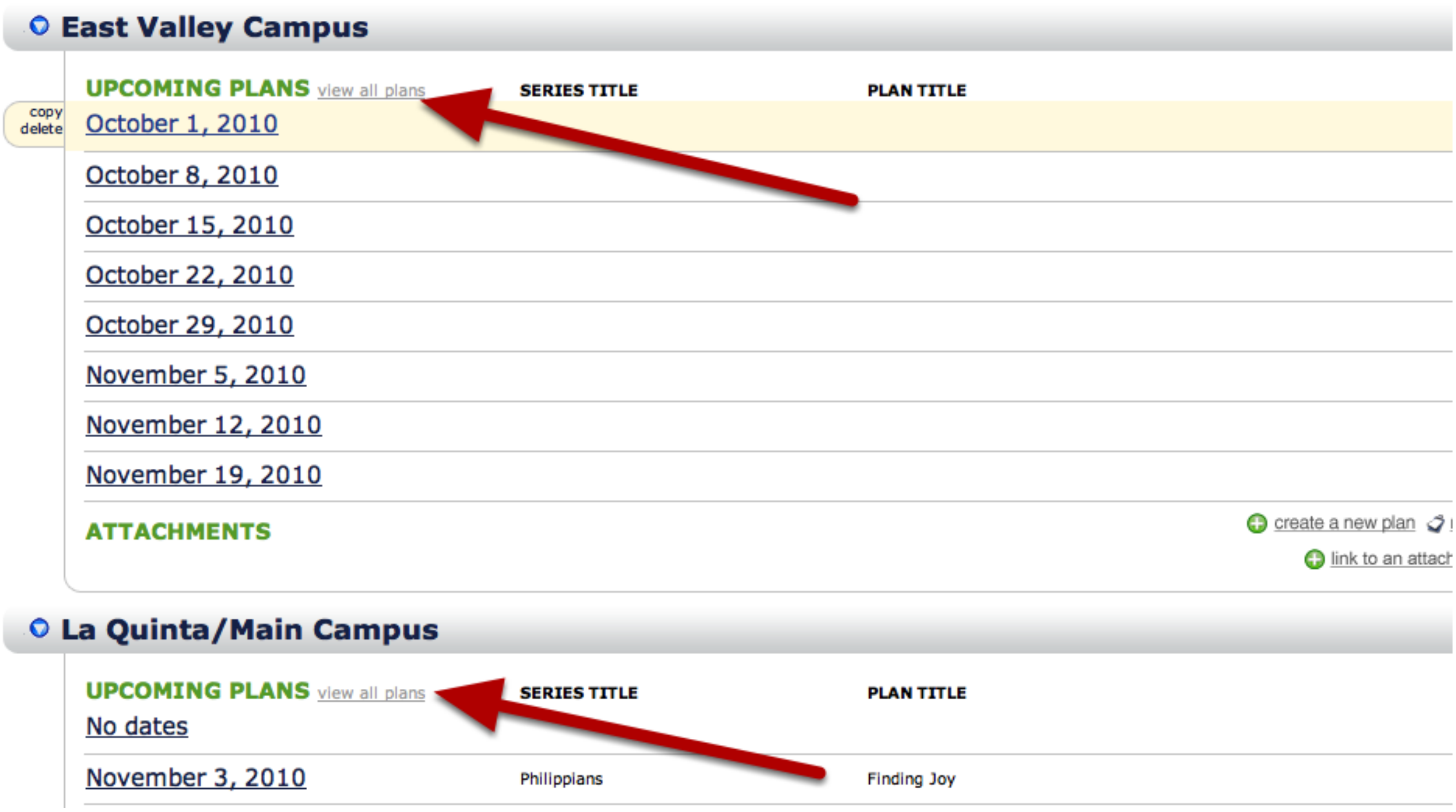
See that your plans are in order.

Back on the main plans page, you can see your Christmas Eve plan has been inserted in the right place. Now when you make new plans, it will copy all of your regular times from the December 28 plan.

Accessing and Copying Past Plans

This lesson shows you how to access past plans, and then delete, view, or copy them. It will also show you how to copy an archived plan into a template, and copy category and position settings from one service type to another.

All past plans (archives) are found on the Plans page when you click 'View All Plans'.

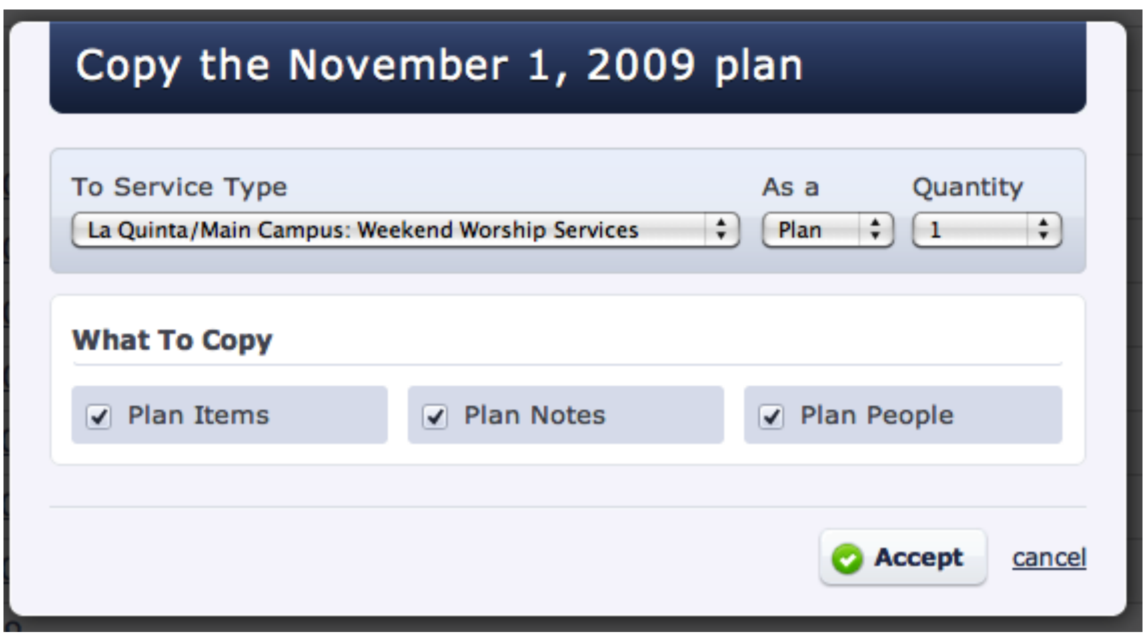


Each service has its own archives. NOTE: If you have a plan displaying that should be archived, it means there is a date involved with that plan that has not yet passed (usually a rehearsal or other time).

To copy or delete a past plan, hold your mouse over the plan date.

To the left, you can now click 'copy' or 'delete'.

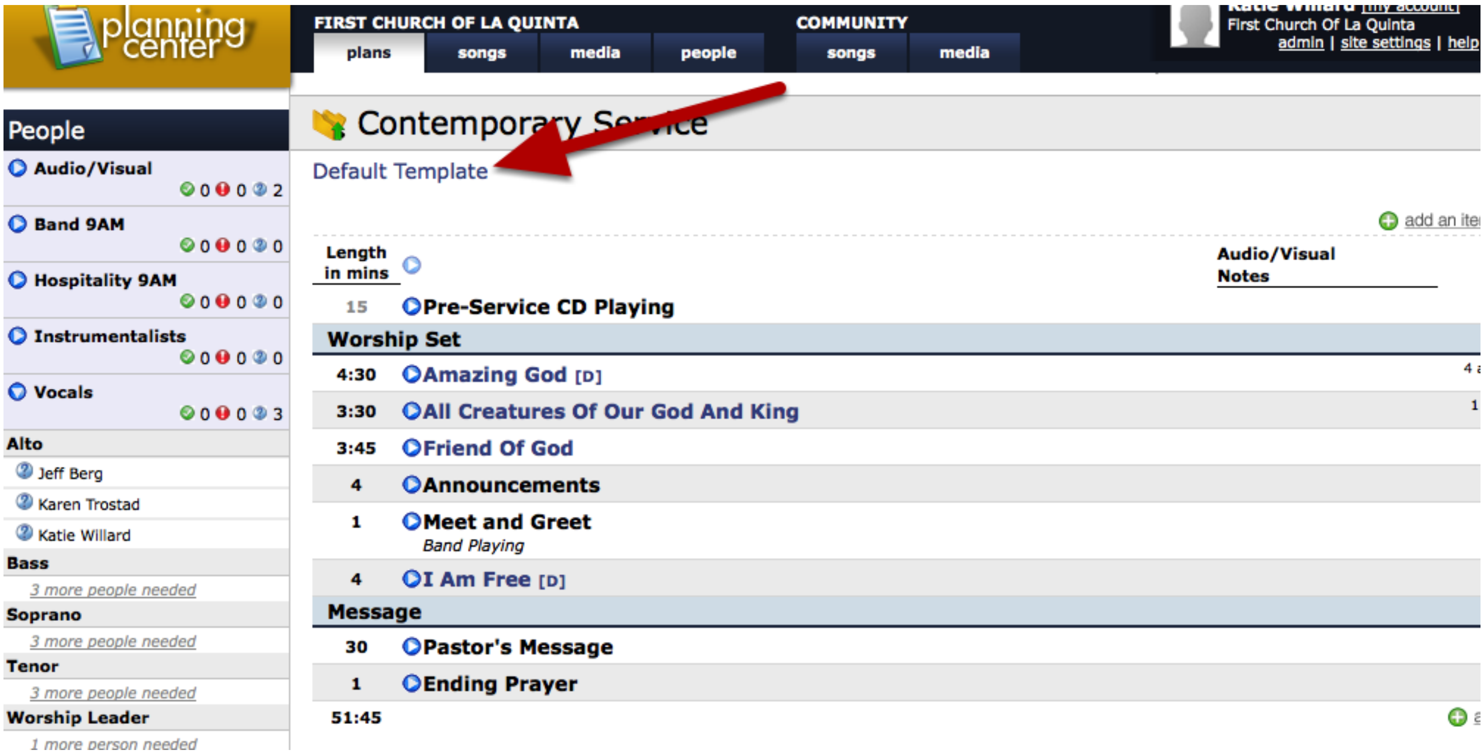
When you click Copy:



You can choose where to copy your plan to. It will take place in the last dated plan in that service type. You can also choose what you want copied over- items, notes, or people. You could also choose to copy it as a template.

You can use this technique to copy category and position settings from one service type to another. When you copy to a different service type, if there are any item, note or people categories or positions in the plan you are copying that are not in the destination service type, Planning Center will create them in the destination service type. So to copy your settings, you just need to go into a plan and make sure you have something entered into that plan for every category and position you want copied to the new service type.

Copying Plan as a Template

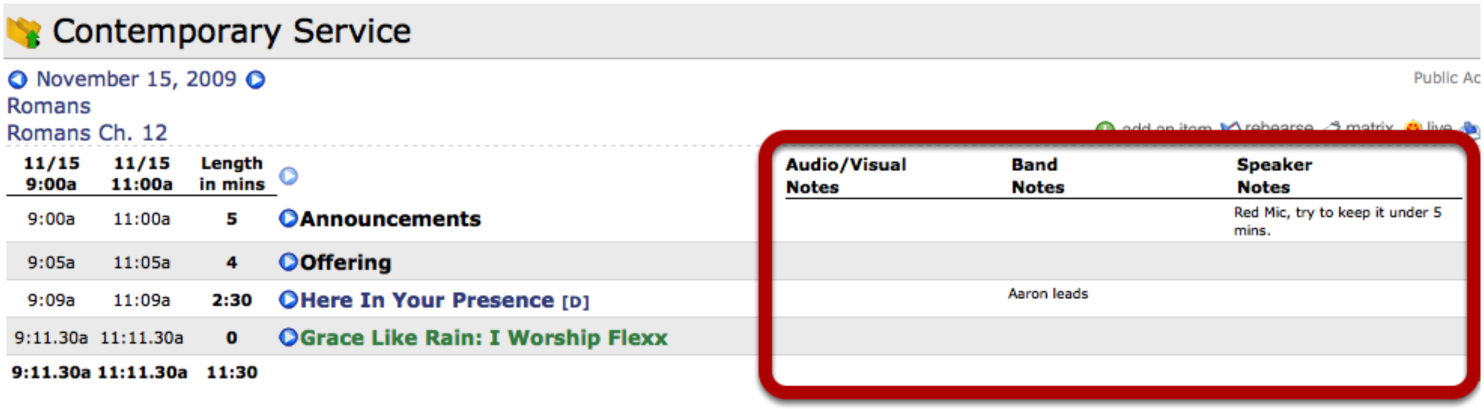


Once you copy your plan to a template, it will show you what this template now looks like. Edit anything you need to, add people, delete people, etc. Make sure you name your template, or else it will just stay named as "default template".

Adding Notes Columns to Plans

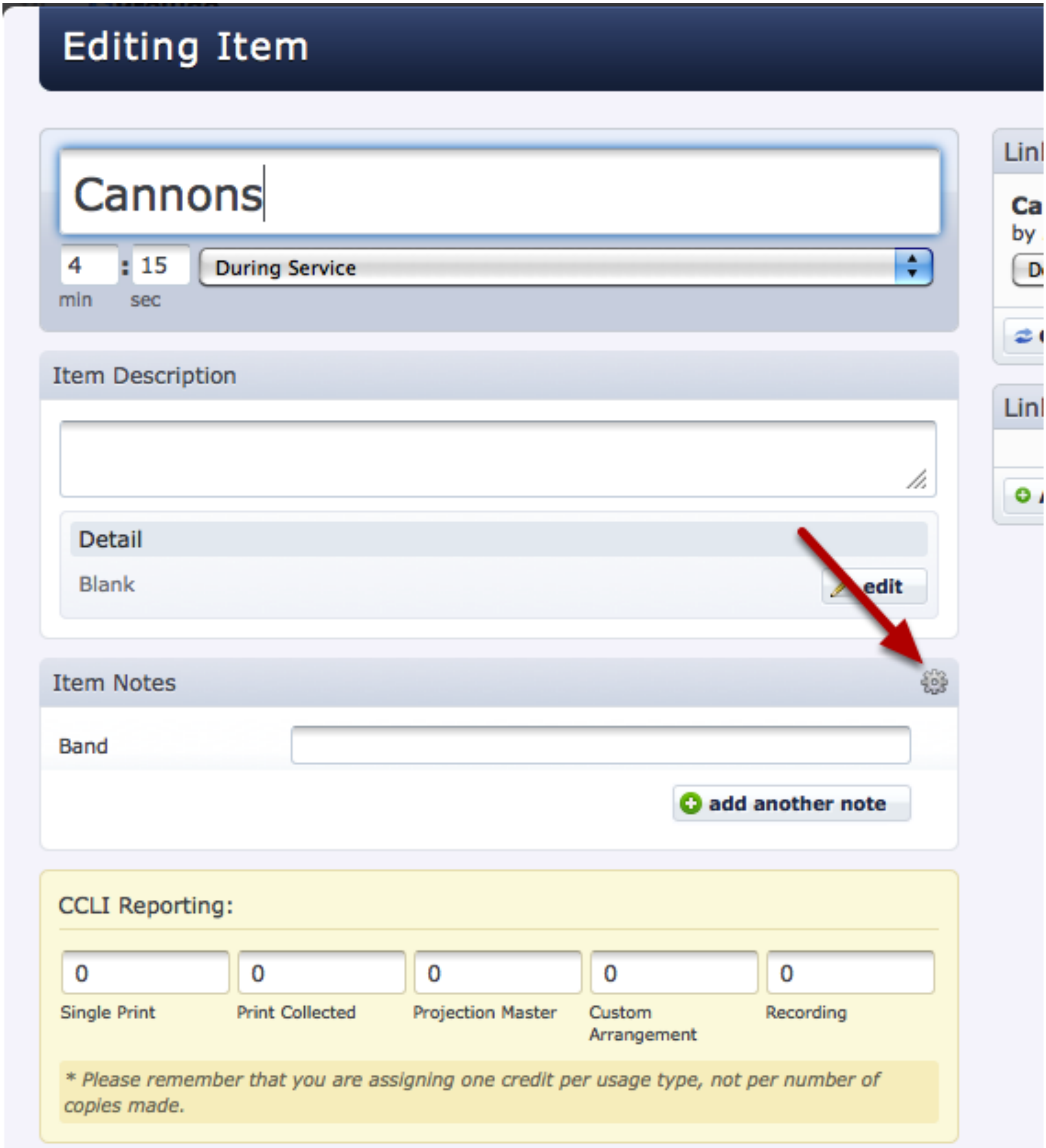
This lesson shows you how to add notes as a column to your plan.

Notes displayed in a plan look like the following:

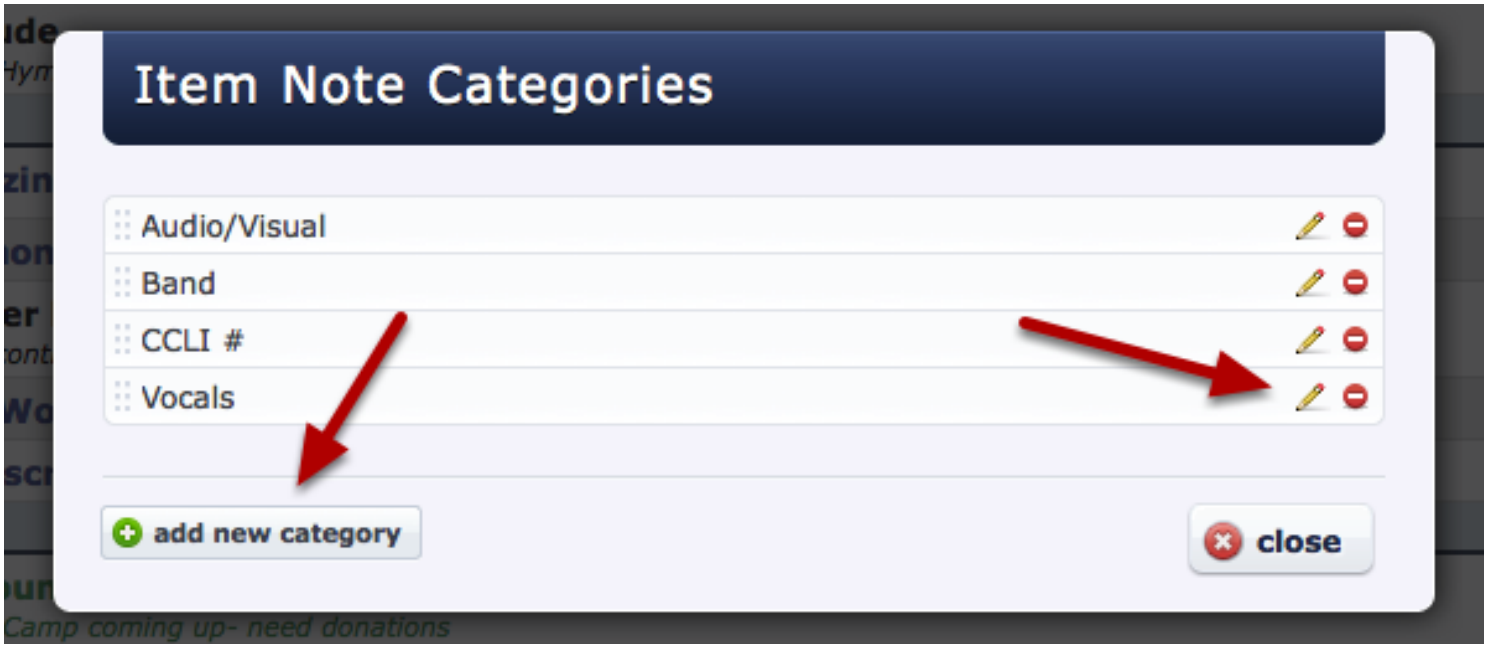


To add a note click on the pencil icon that appears when you hover over an item

Hover your mouse over the Item Notes area and click on the gear icon

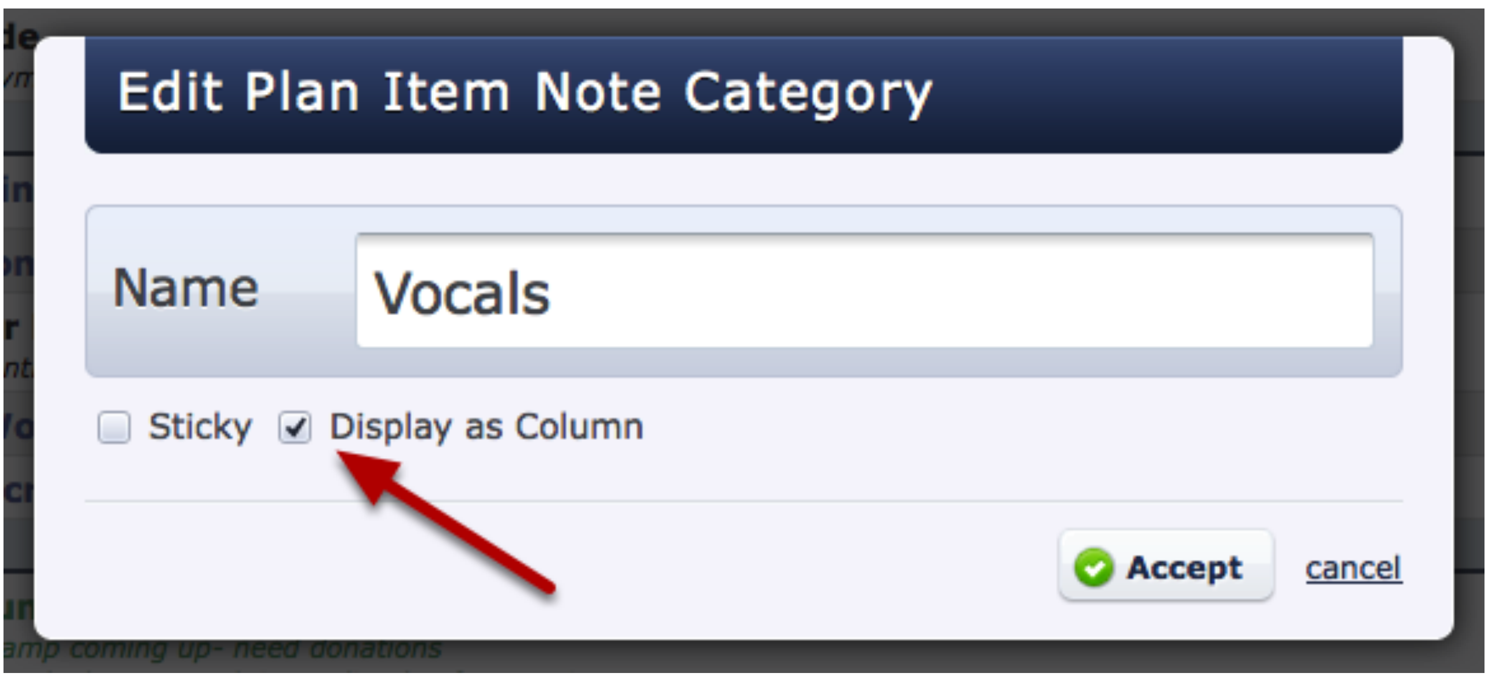


Click the pencil next to the Item Note Category that you would like to crate a column for



To add a new category, click on the 'add new category button'.

Check the 'Display as Column' box, then click 'Accept'



If you would like this note category to appear automatically when you edit an item, also check the 'Sticky' box.

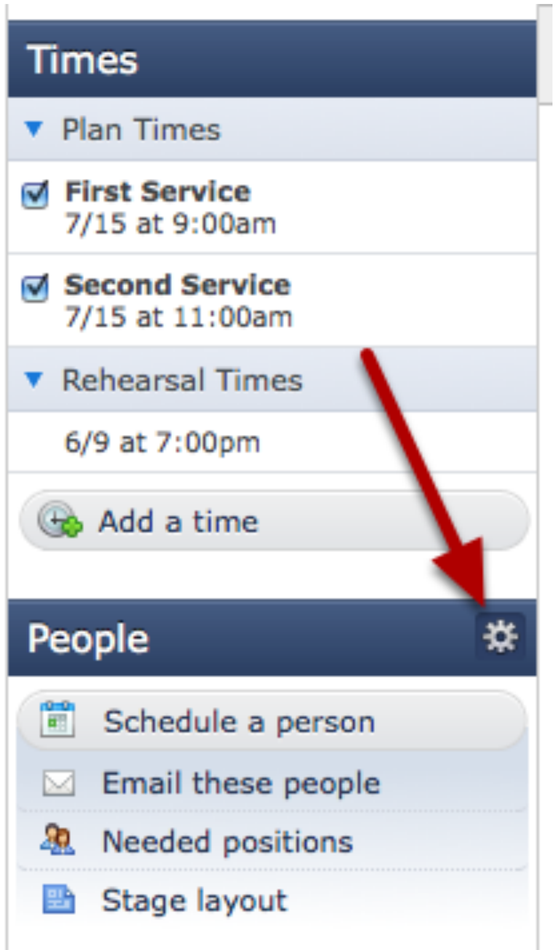
Changes will be indicated in plan.

Setting Up Different Teams for each Plan Time

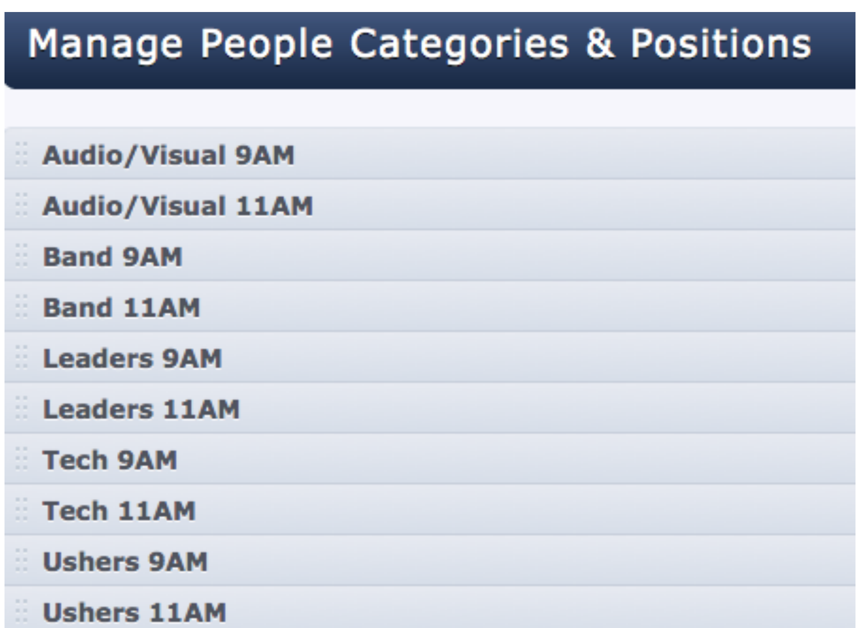
If you schedule different teams for different times within the same plan, this lesson will show you how to create People Categories that coincide with your Times so that your people only see times that are related to them. It will also allow your volunteers who serve at multiple services to decline and accept for each service time.

Click on a plan date from the main Plans page.

Hover over 'People' and click on the gear icon

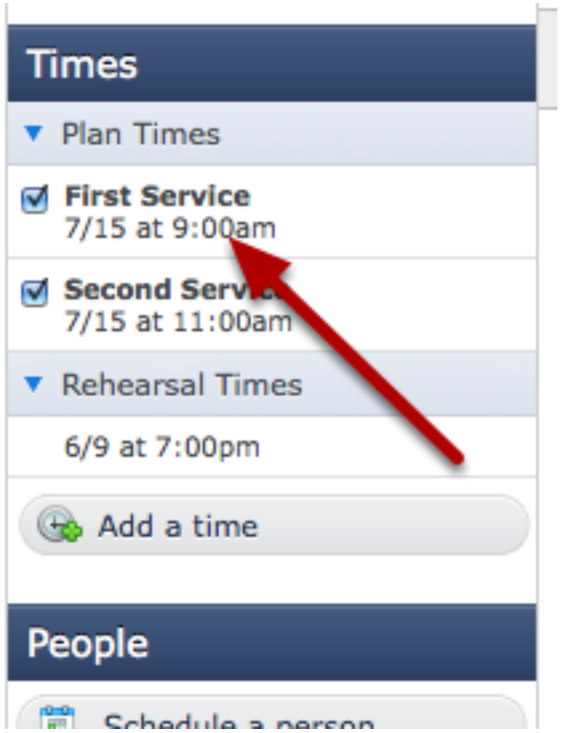


Create Categories for each of your groups and times

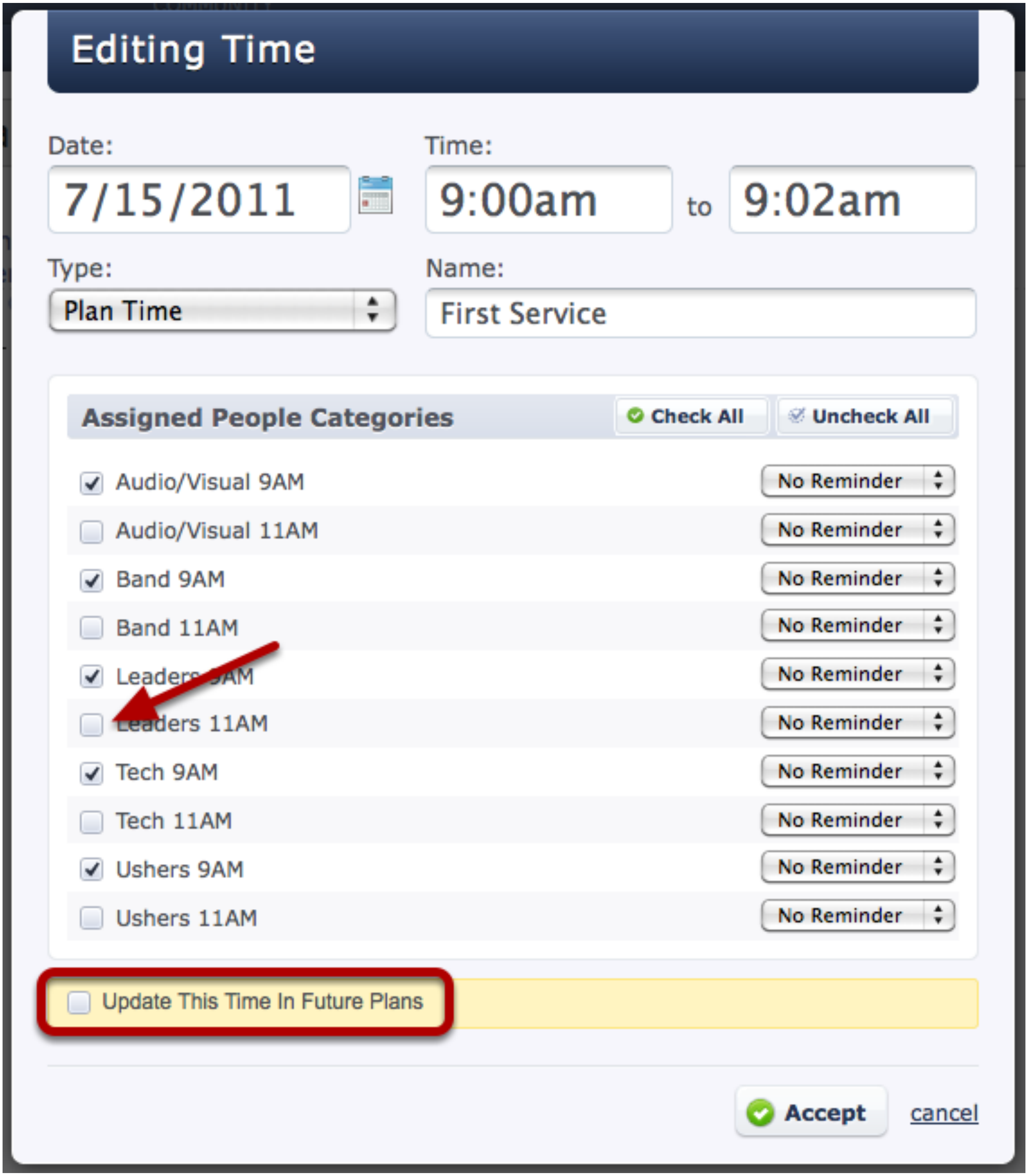


For a detailed description on how to do this, see our lesson on Setting Up or Editing Categories

Then click on each time under the Times box.



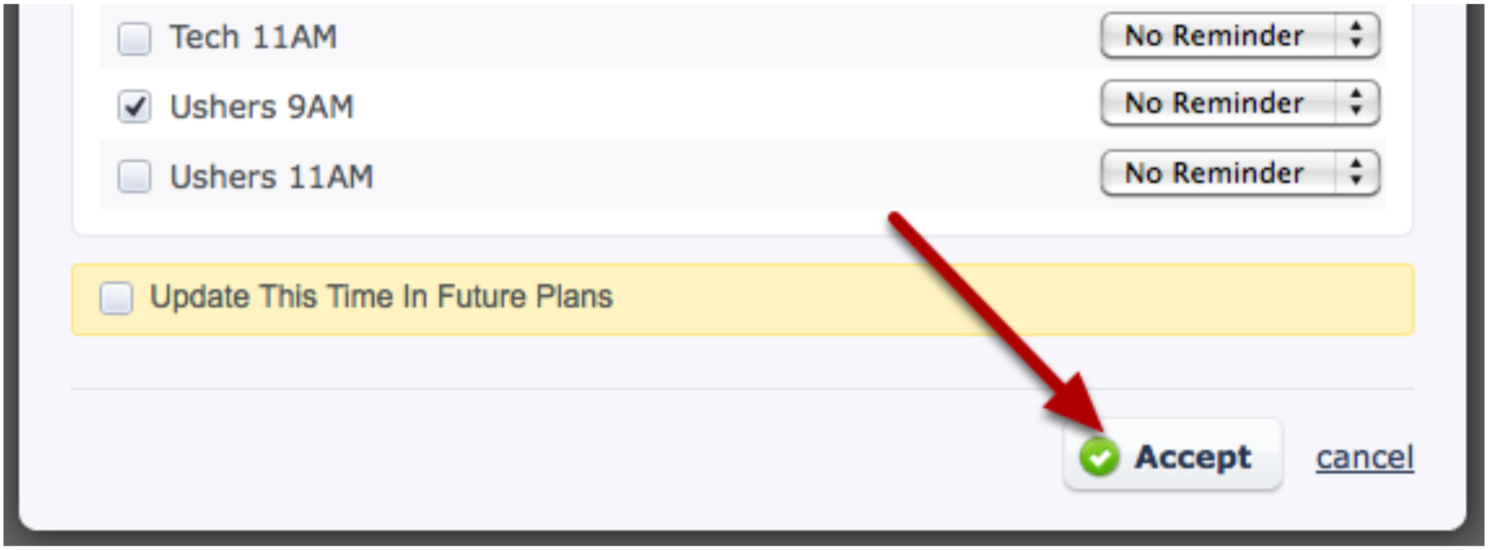
Click the check mark to uncheck the Categories that don't apply to this time.



Unchecking these boxes will unassign those People Categories from this Time for people you schedule in the future. Since this is our 9:00AM plan time, we only want our 9AM People assigned to it, so we uncheck the other Categories.

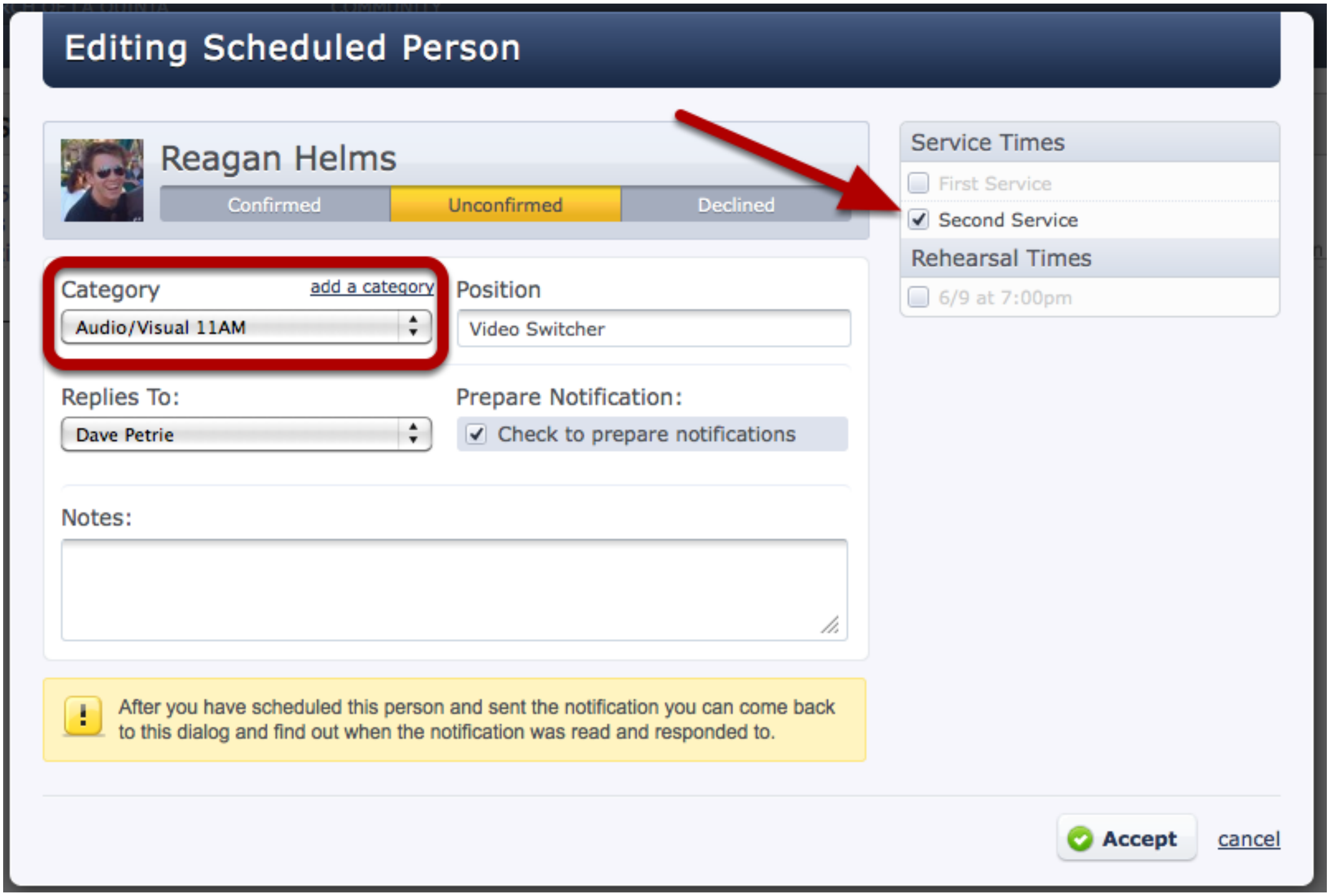
NOTE: If you have plans that occur after this one, make sure that you check the 'Update This Time In Future Plans' box so that all of your plans are updated with this new information.

Click accept.



Once I've unchecked any categories that shouldn't be responsible for this time, click accept and begin scheduling.
NOTE: It's important that you do this before you begin scheduling, so that when someone is scheduled, these defaults will be applied to their scheduling details.

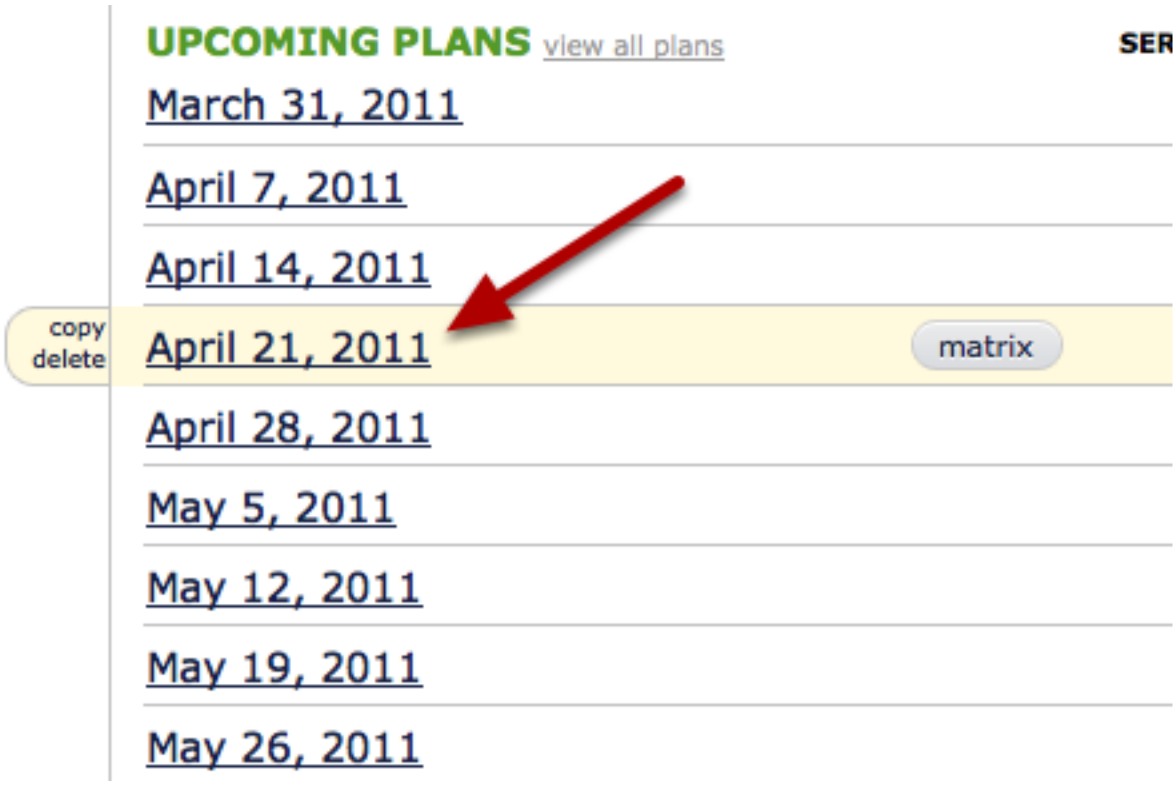
When people are scheduled, the appropriate times will be reflected automatically.



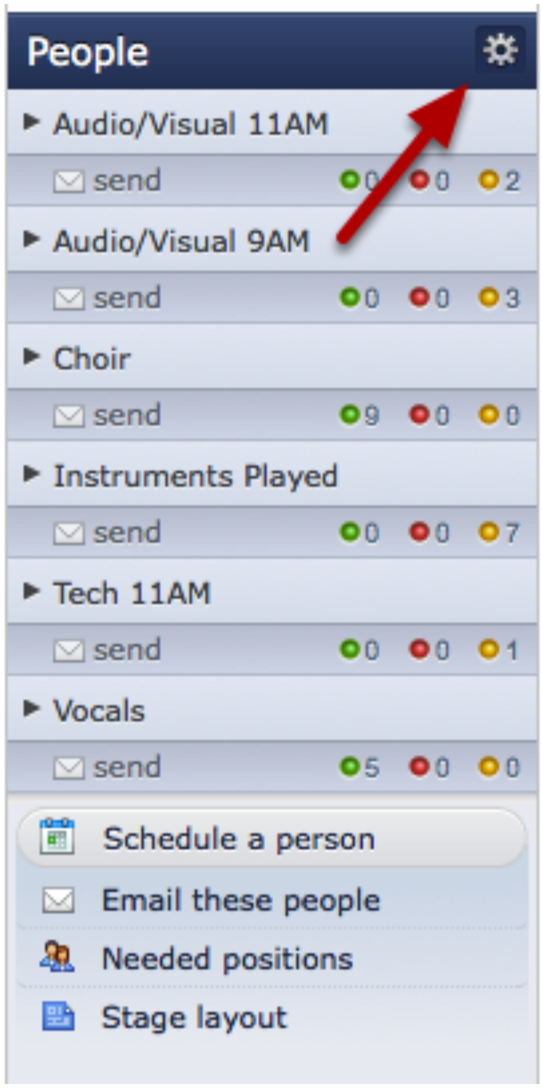
Because Reagan is being scheduled for the "Audio/Visual 11AM" category, only the "Second Service" time is checked.
If Reagan serves at more than one service on a weekend, this will cut down on conflicts that will appear when scheduling him, and will allow for better communication between him and his scheduler if he was unavaliable for a particular service time.

Changing the Replies To person for a People Category

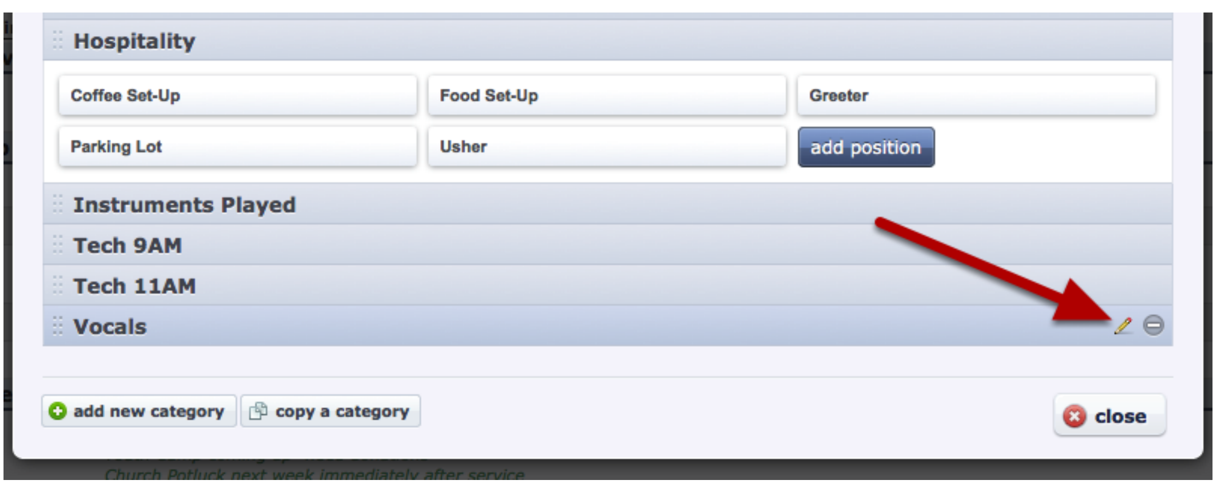
Click on a plan



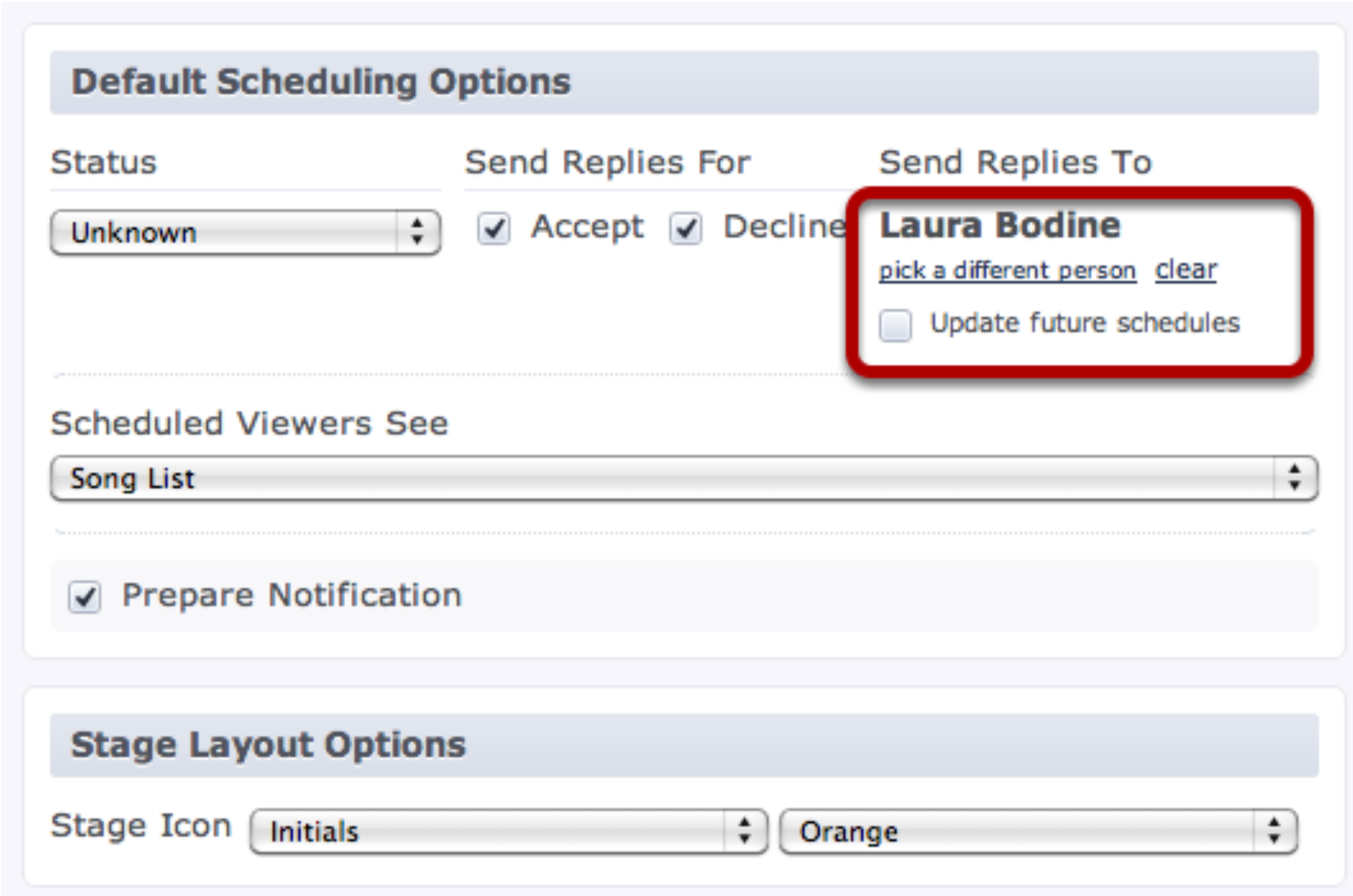
Hover your mouse over the 'People' bar, and click on the gear icon.



Hover your mouse over the category that you need to change, and click on the pencil icon.



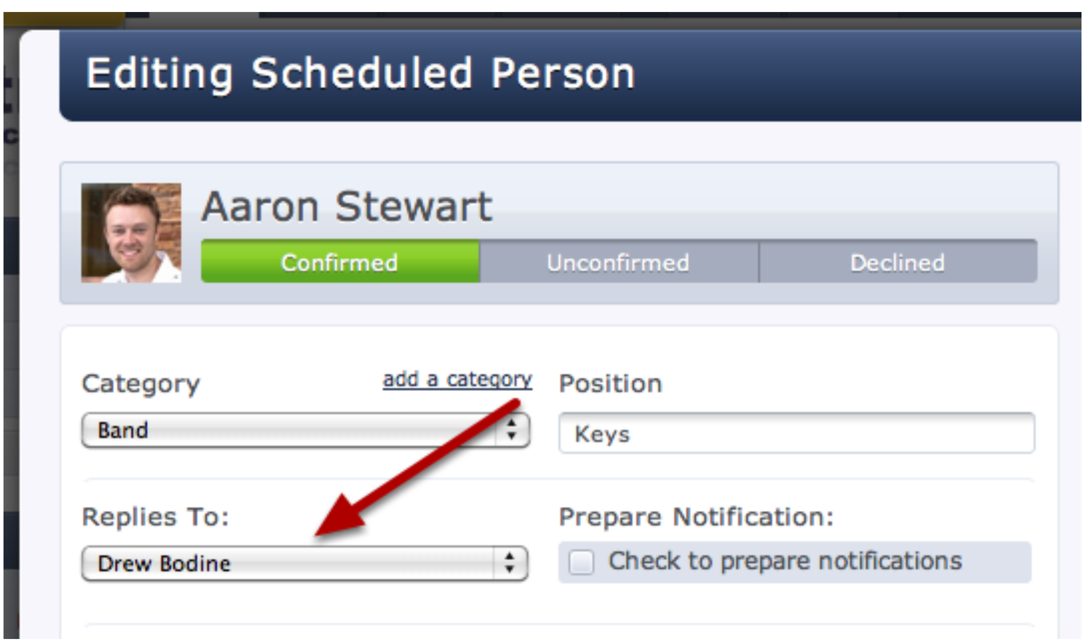
Enter the name of the person you would like to send replies to, and click 'Accept'



If you'd like to update the replies to person for people you've already scheduled (for plans that haven't yet occured), check "Update future schedules".

To change the replies to person for a single person click their name in a plan.

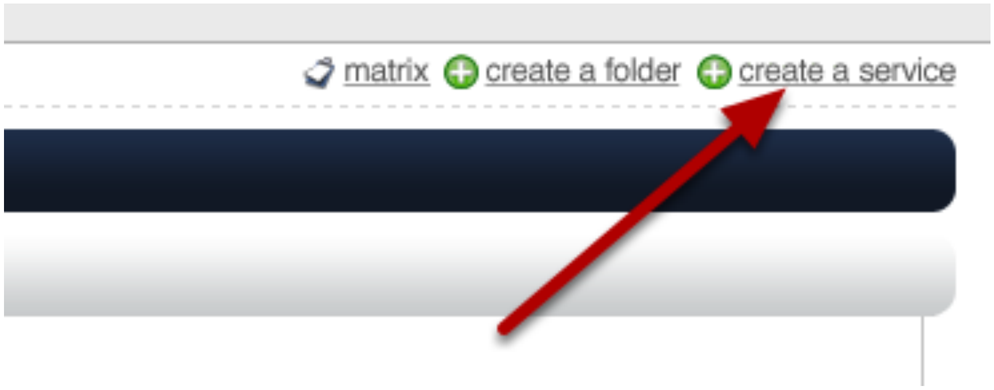
Change the Replies to person manually, then click accept.



Creating a New Service Type

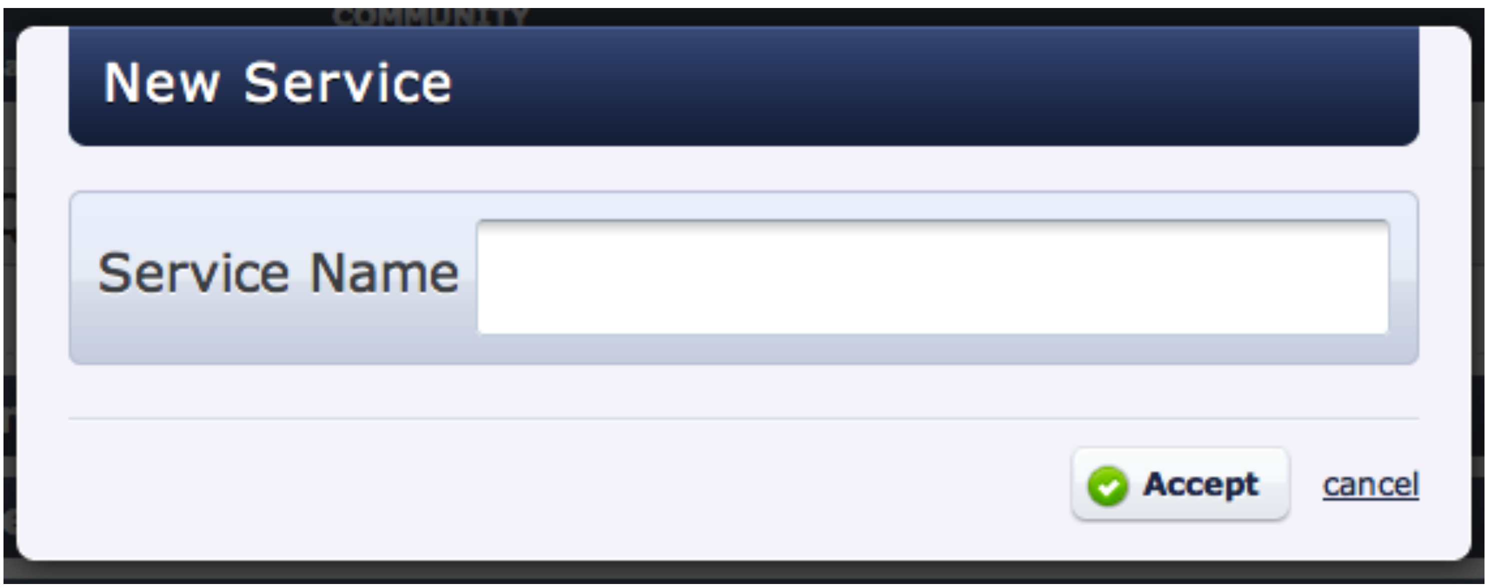
This lesson shows you how to create another service in your account.

Click on 'Create a Service'.

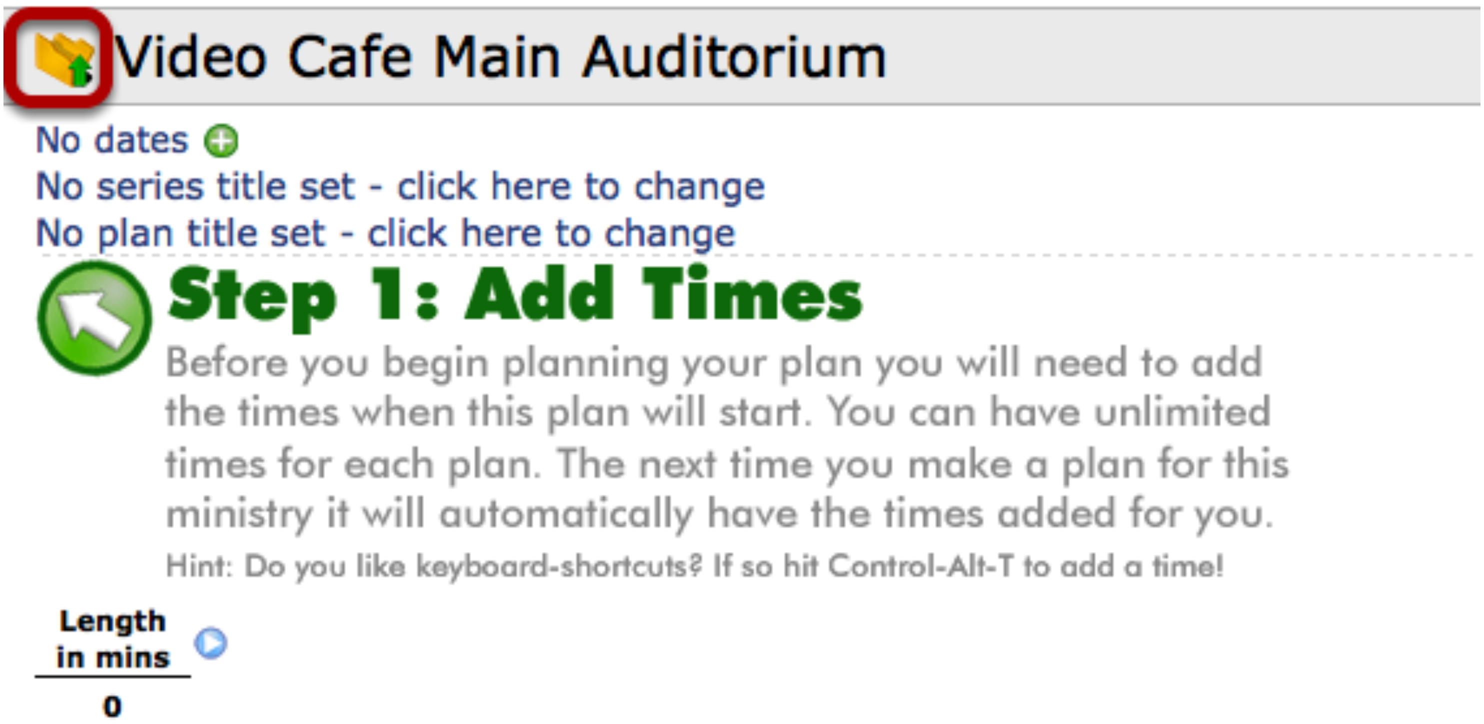


Note: Only Administrators have this option.

Name your Service and click Accept.



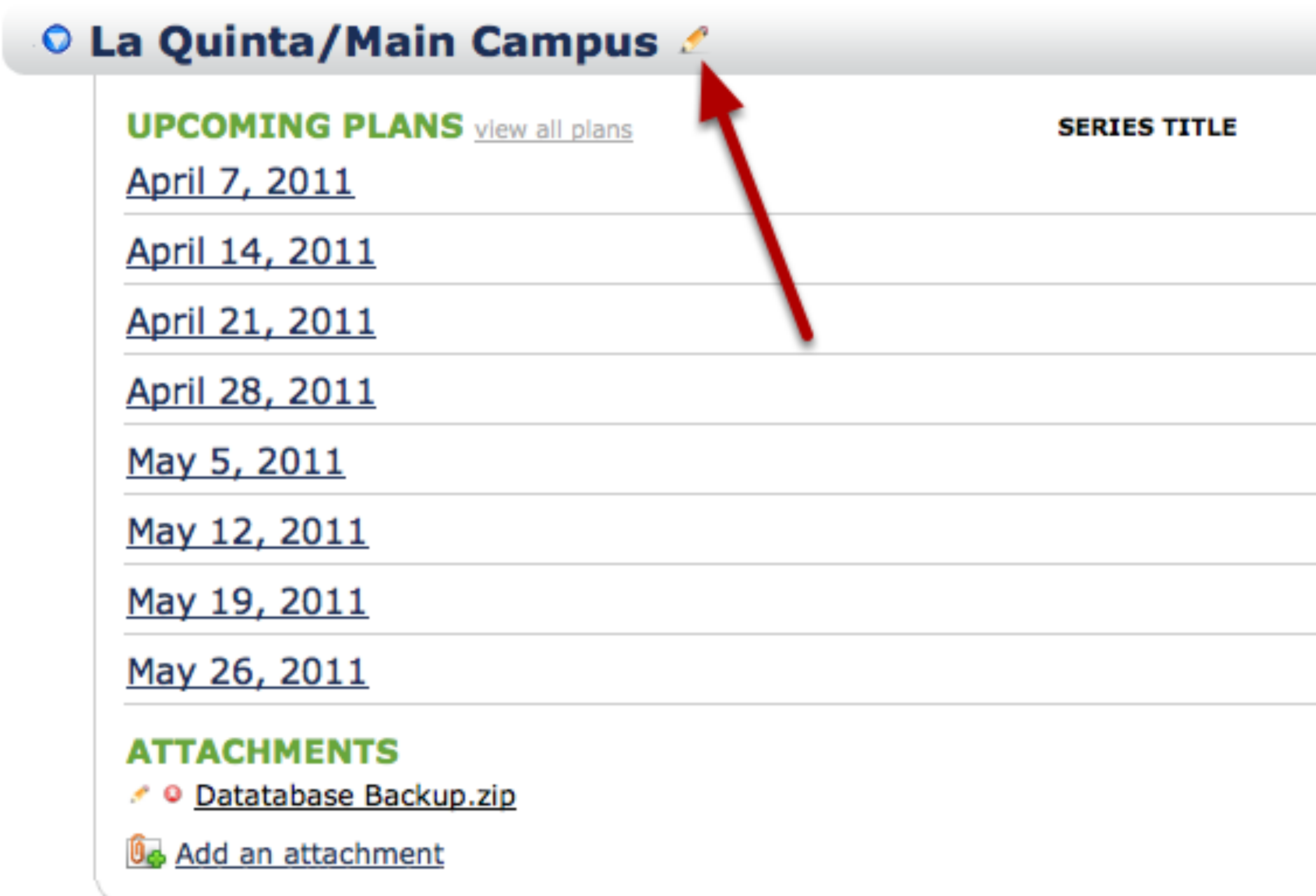
Service and first plan have been created.



Here you can begin planning the first plan inside this new service. If you want to just go back to the main Plans page, click the yellow folder with the green arrow on it (outlined in red above).

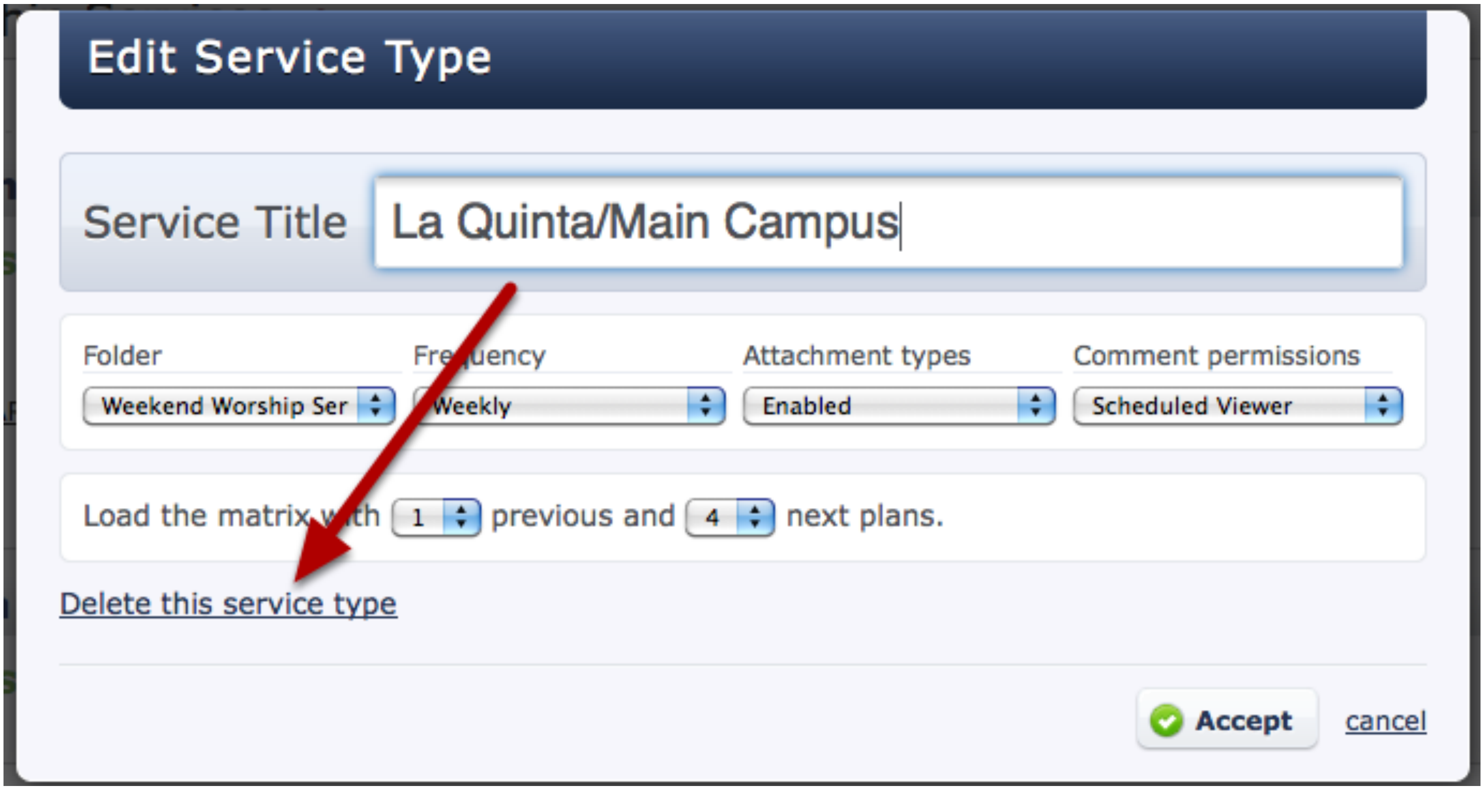
Editing Or Deleting A Service

Click on the pencil icon

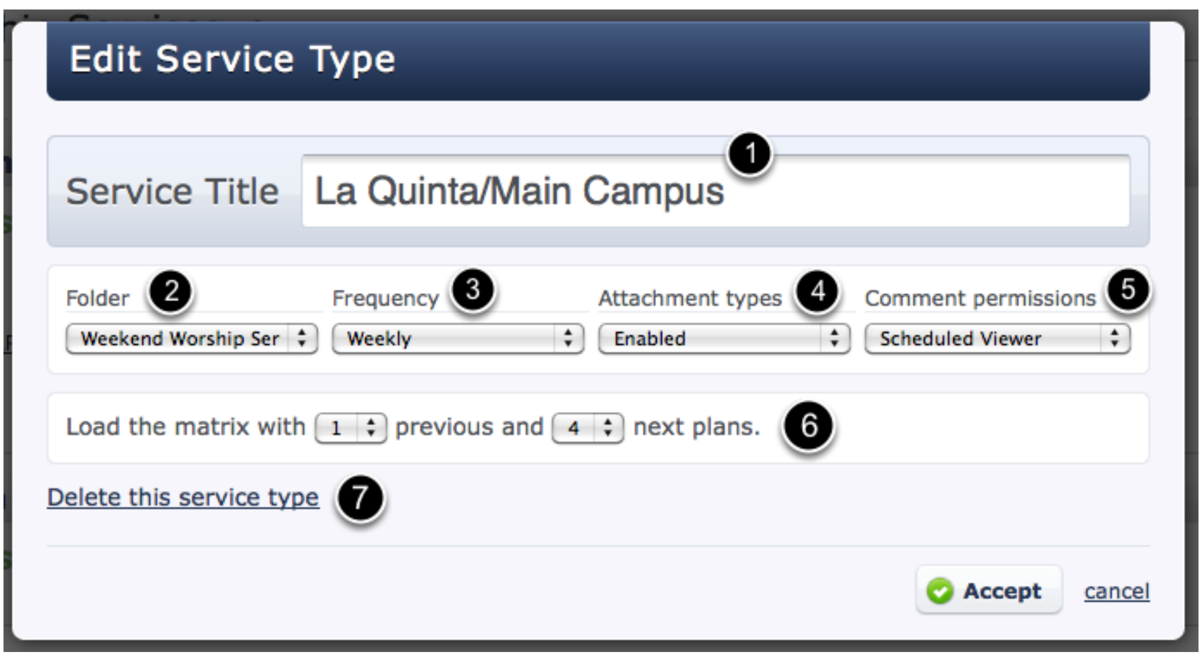


Note: Only Administrators will have access to this icon.

To Delete your service, click 'Delete this service type' on the left.



To Edit your service properties...



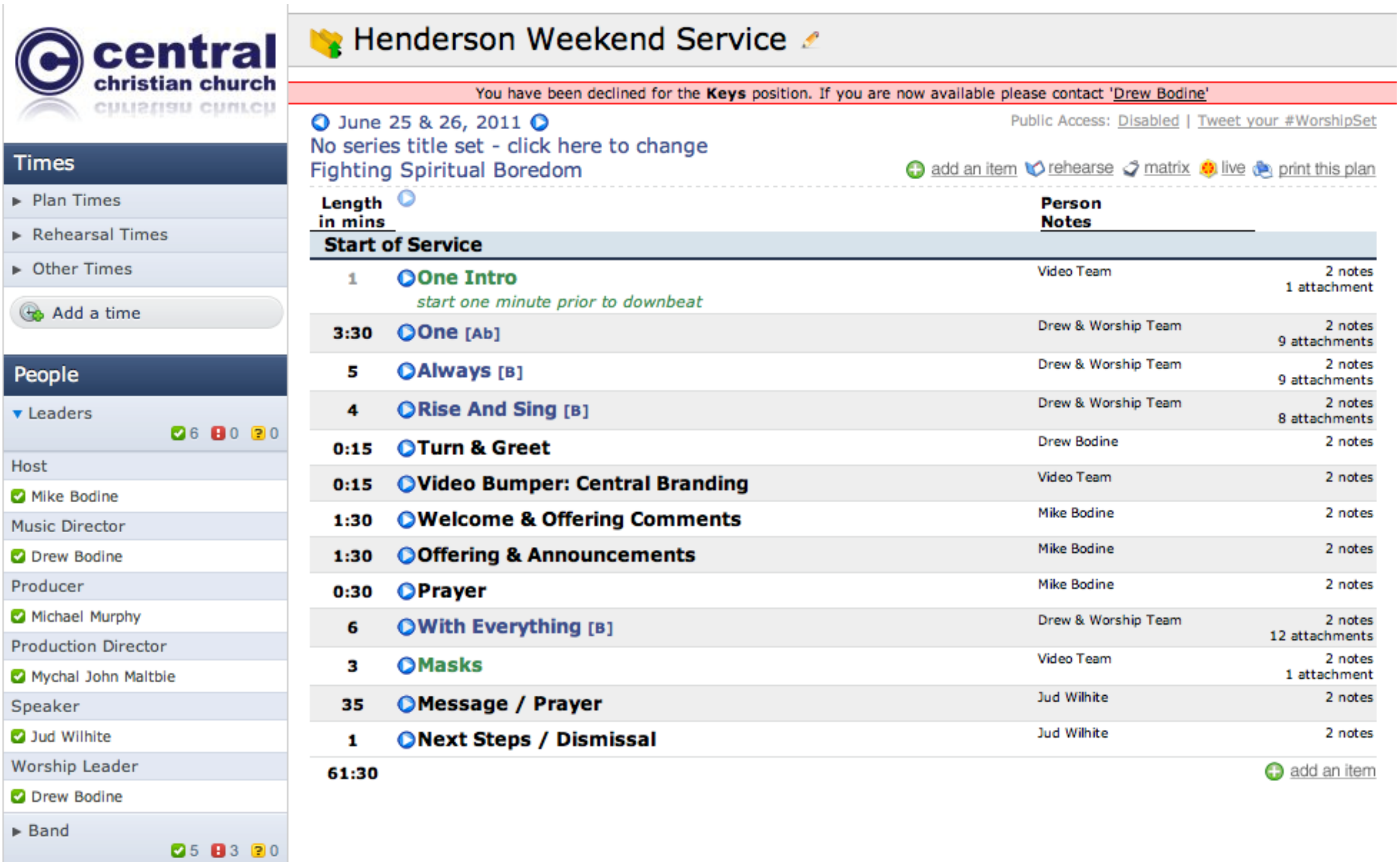
This is where you can edit the 5 service properties listed below that heading:
1- Name of service
2- Folder this service is under

3- Frequency the service is set to when creating new plans
4- Attachment Types being enabled or disabled
5- Level of permissions for comments
6- Default Matrix settings for this service
7- Delete the service

Creating a Template from an Existing Plan

You can create Templates that can then be used to quickly create new plans containing the same information, or to apply to existing plans. This lesson shows you how to "convert" a plan you've already created into a template.

View the Plan you want to convert into a template

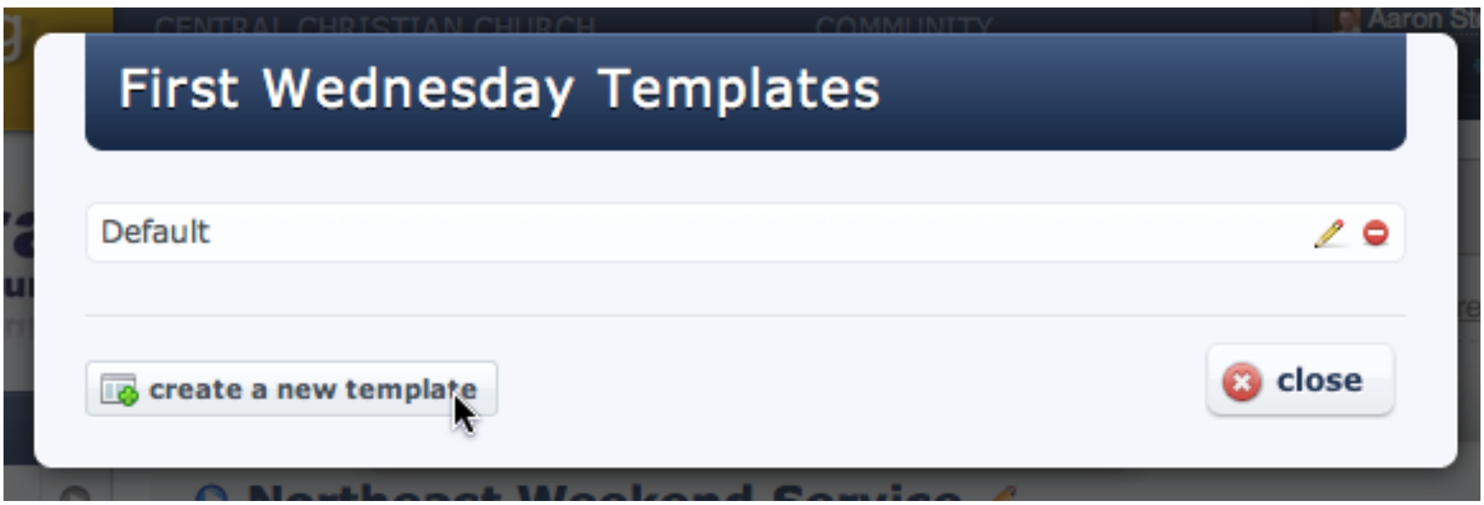


Planning Center stores your recently visited plan in memory. By visiting this plan, we are storing it in memory so that we can then choose it as the source of our new template.

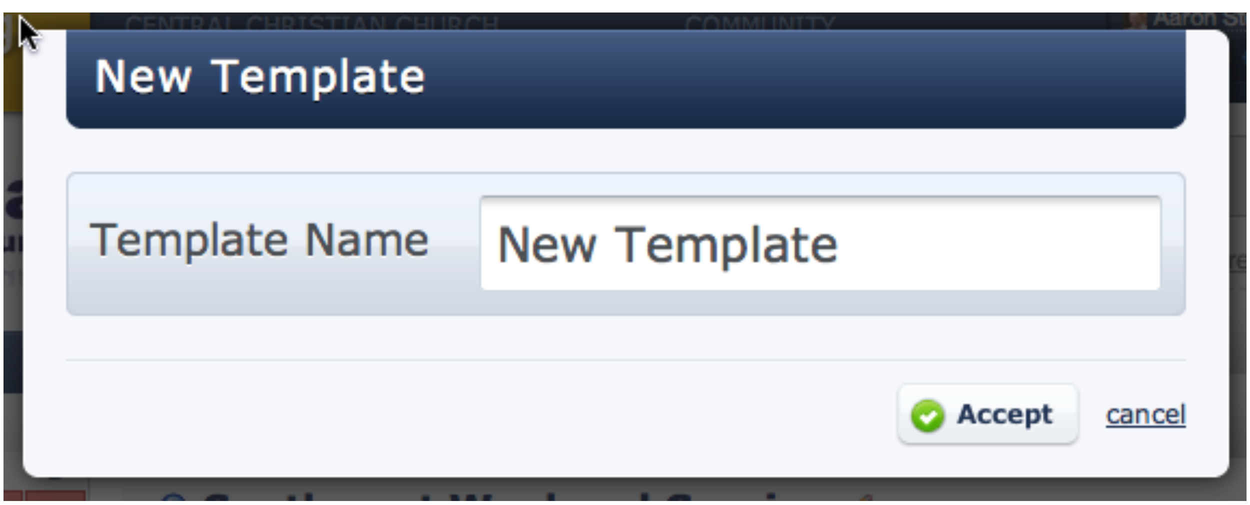
Go back to the main Plans page (Dashboard)

Click "templates" for your Service Type

Click "create a new template"

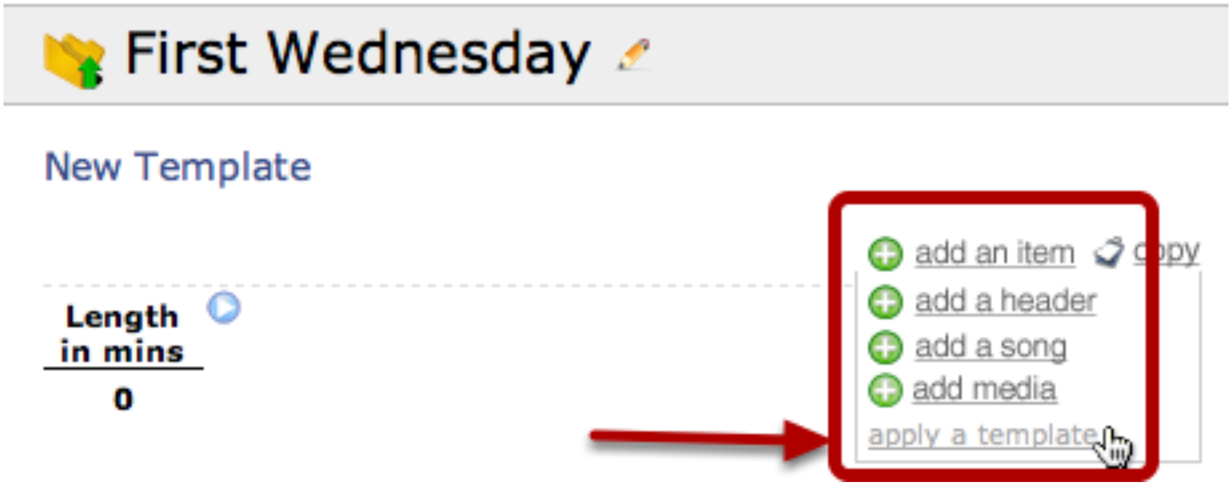


Give Your Template a Name

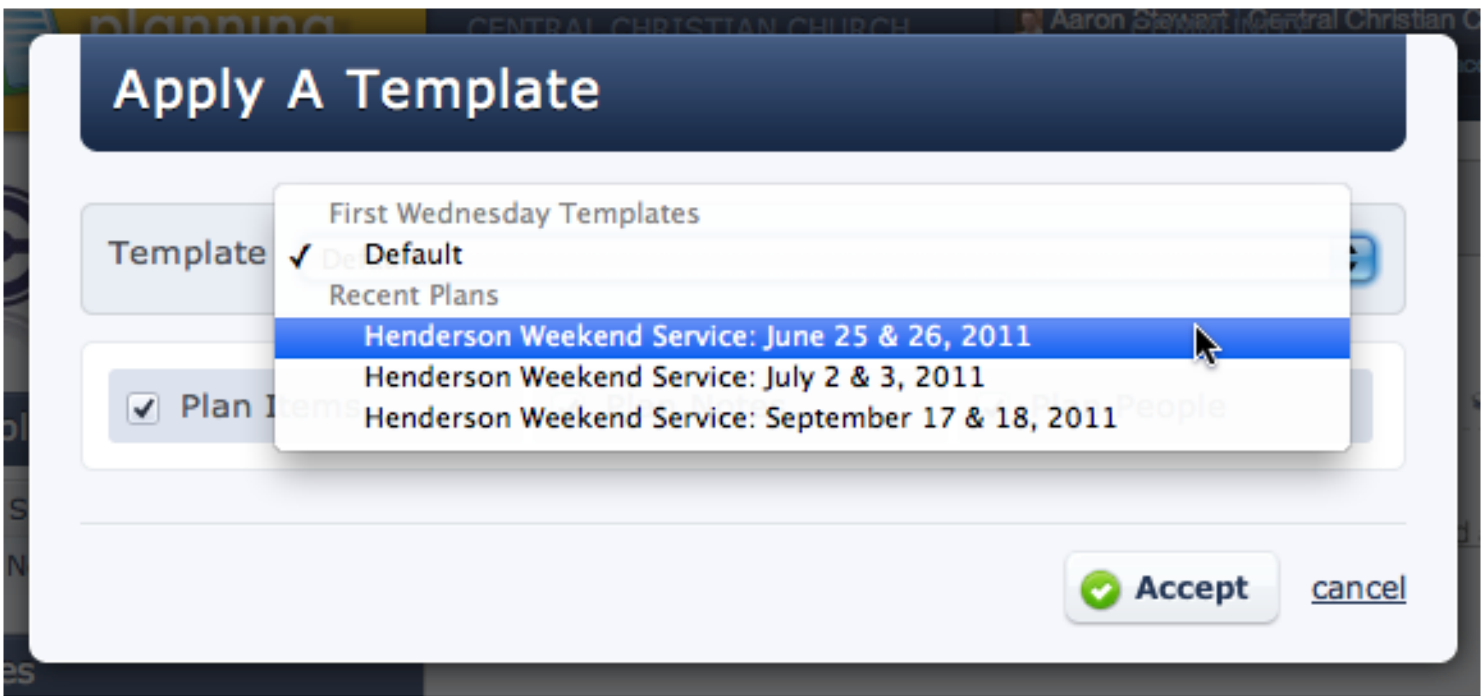


Then click Accept

Hover over 'add an item' and click 'apply a template'

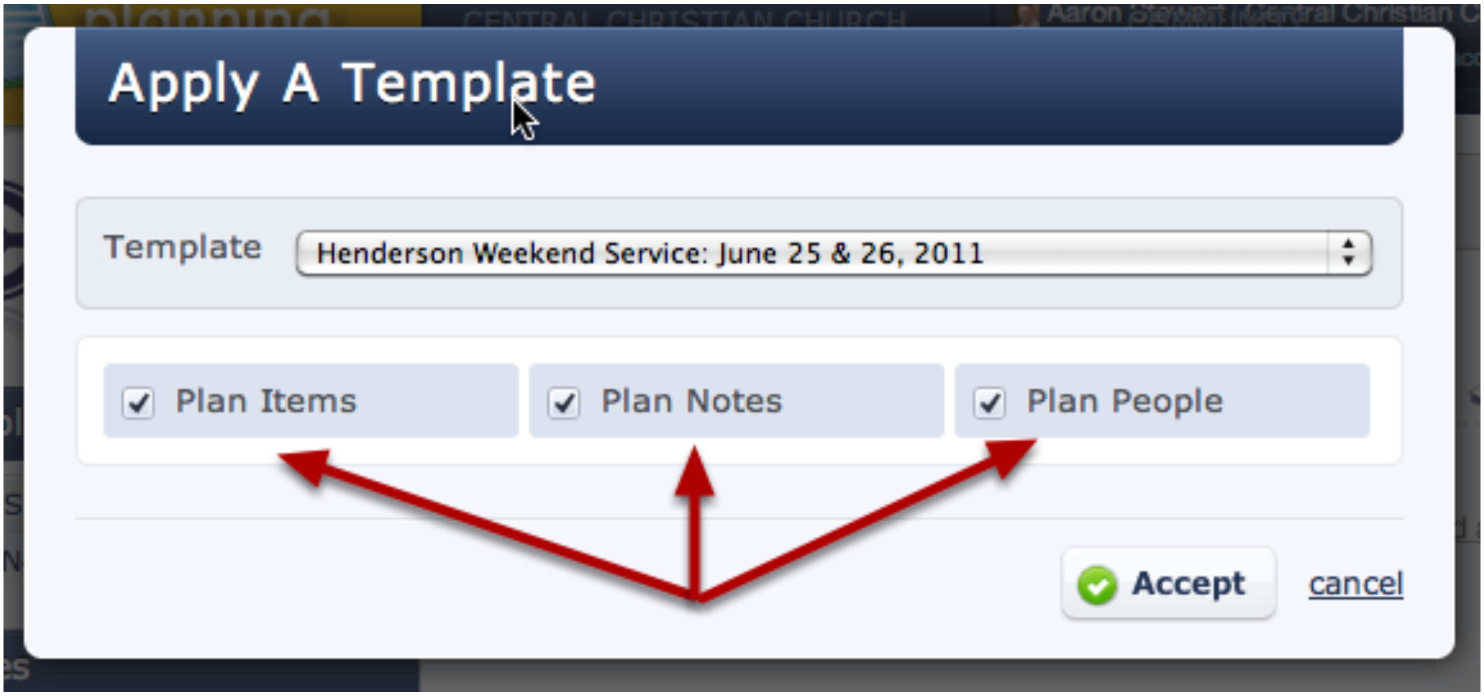


Choose your recently visited plan from the list



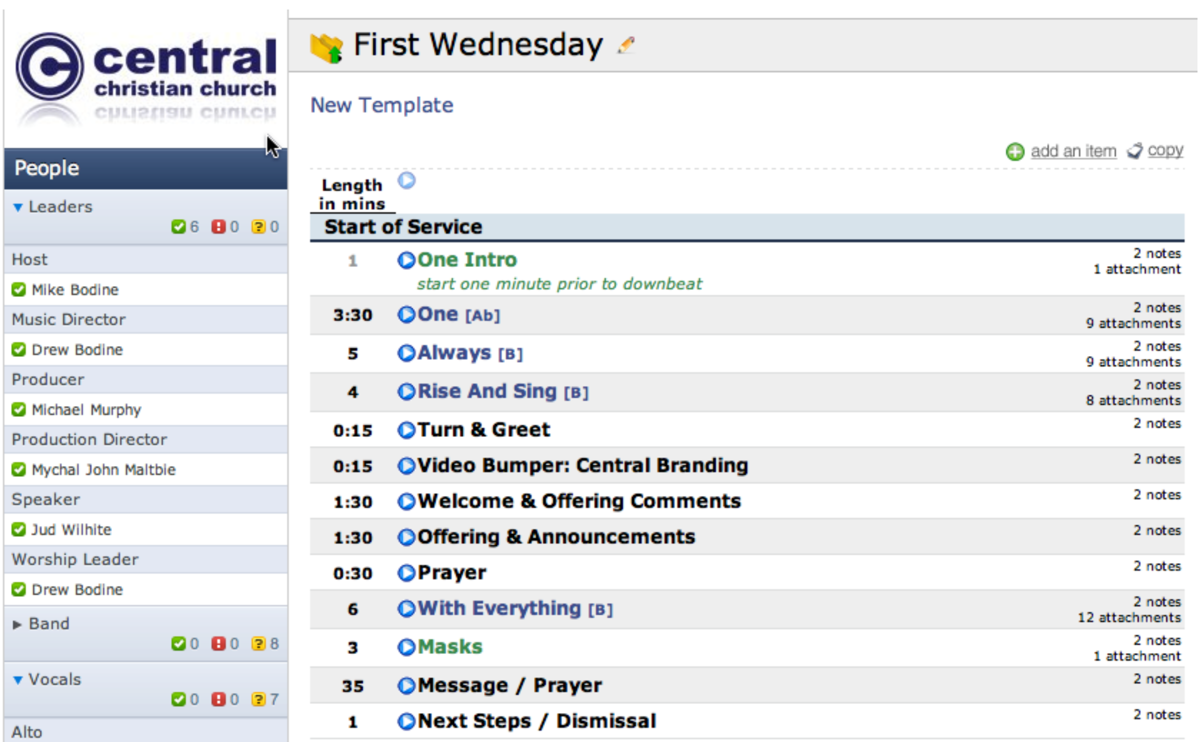
Because we went into the June 25 & 26 plan right before doing this, it is in our list of Recent Plans.

Choose what to copy



Copy Plan Items (and all their notes), General Plan Notes, or Plan People from your Recent plan. Once you've chosen, click Accept.

Your selected elements are copied to your new template



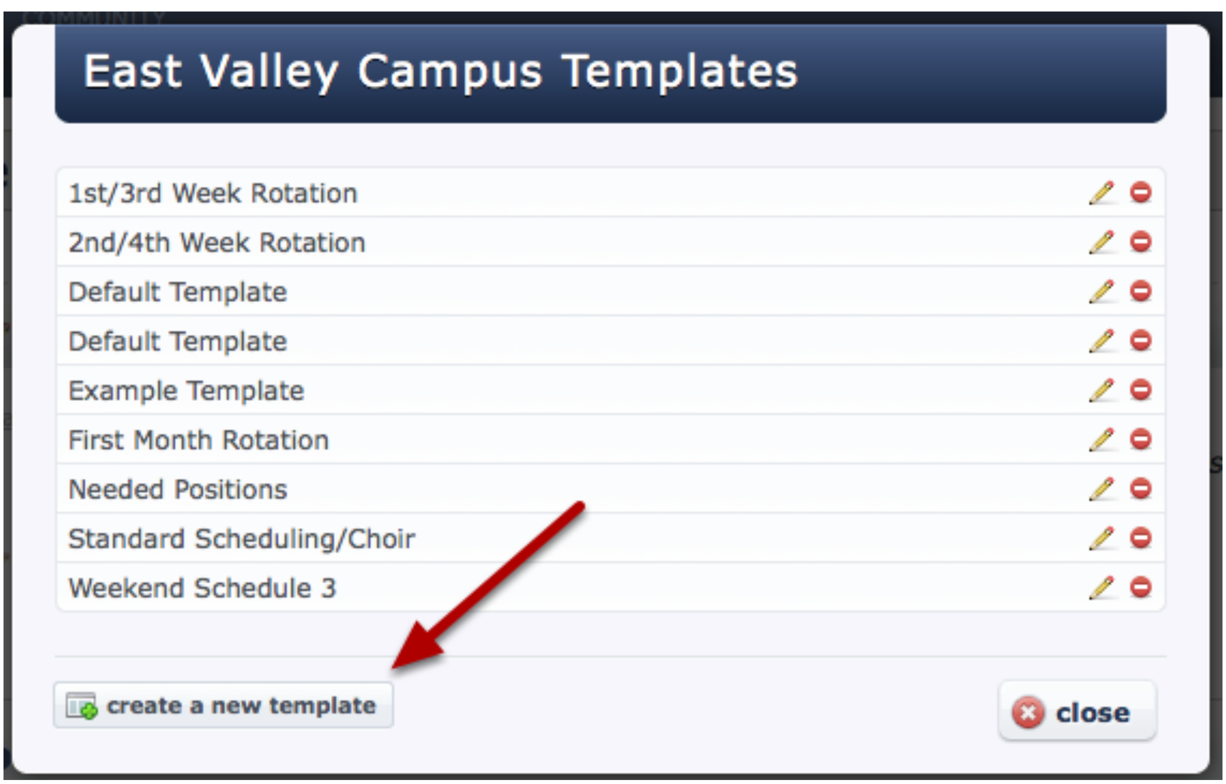
To create a new plan based on this template, see this lesson.

Creating A Template and Applying it to a Plan

Click onTemplates'

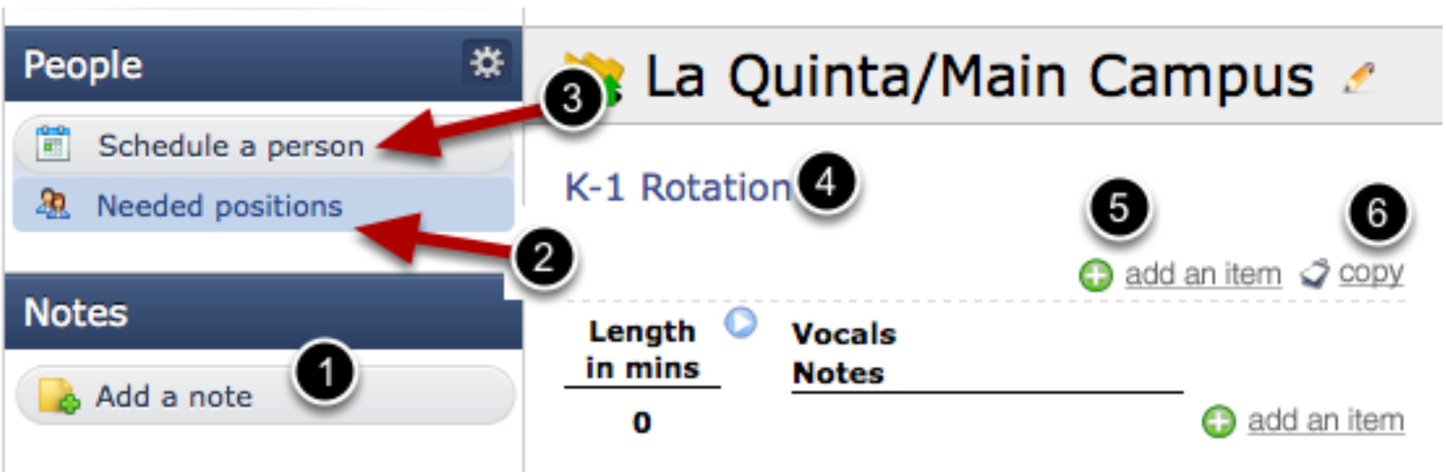
Note: Only Administrators have access to the Properties page.

Click on 'create a new template'



Enter the name of the template

Add to your template



Here are things you can add to your template:

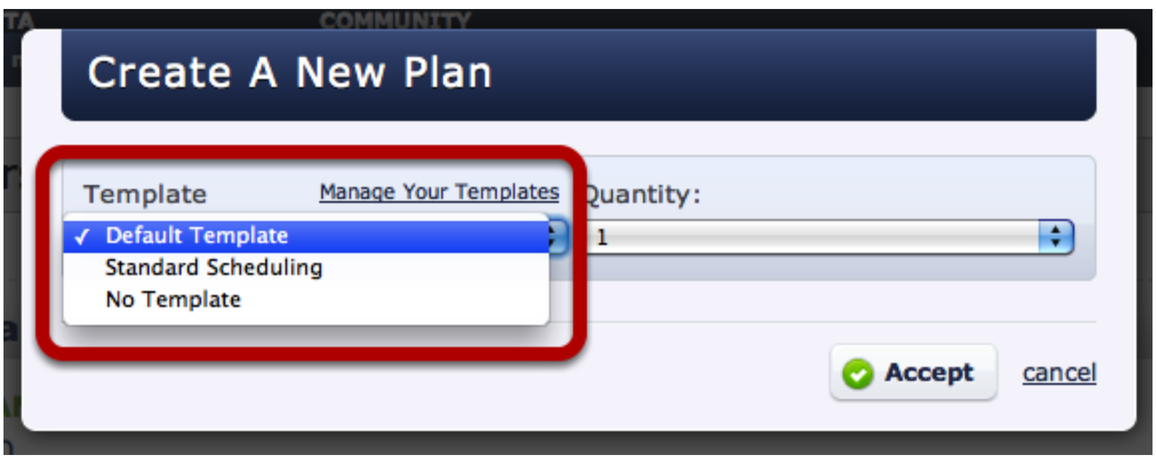
1. Add Notes.
2. Needed Positions. This is very helpul because needed positions do not copy over from one week to the next when you are creating new plans. Save them in a template, and use this template each week. Your needed positions will always come up how you want them.
3. Schedule A Person. Especially if you have people that do the same job most weeks, this is a great way to cut back on redundancy.
4. Add or Edit the name of your template here.
5. Add an Item, Header, Media, or Song. Hold your mouse over the Add An Item link and the drop-down list will come for you to add any of these elements.
6. Right from the template you can copy it to a plan. This eliminates a step or two if you are

editing a template then want to apply it to a plan right then.

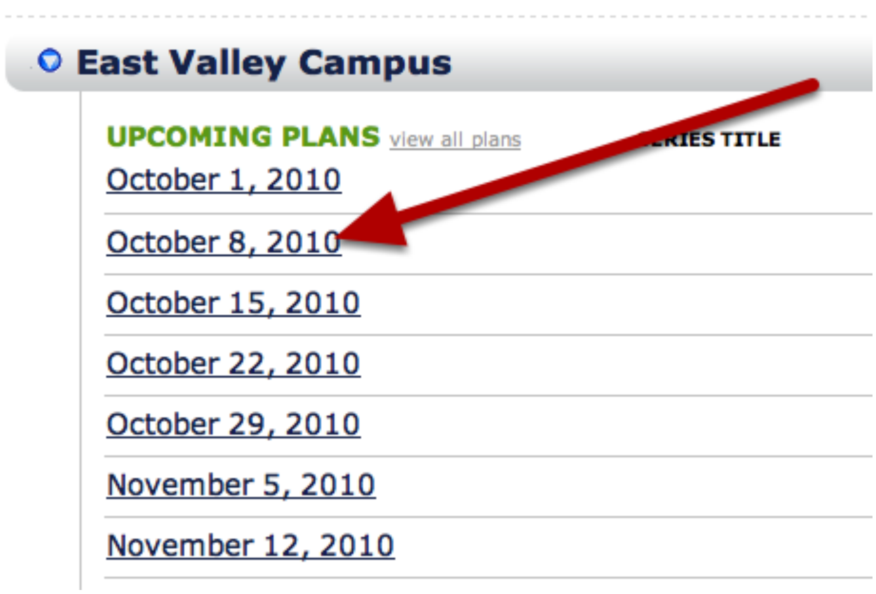
Note: you cannot add times to templates.

To apply this template to a brand new plan, click 'Create a new Plan'.

Indicate which template you would like applied to this new plan and click Accept. Your new plan will be created with that template applied to it.

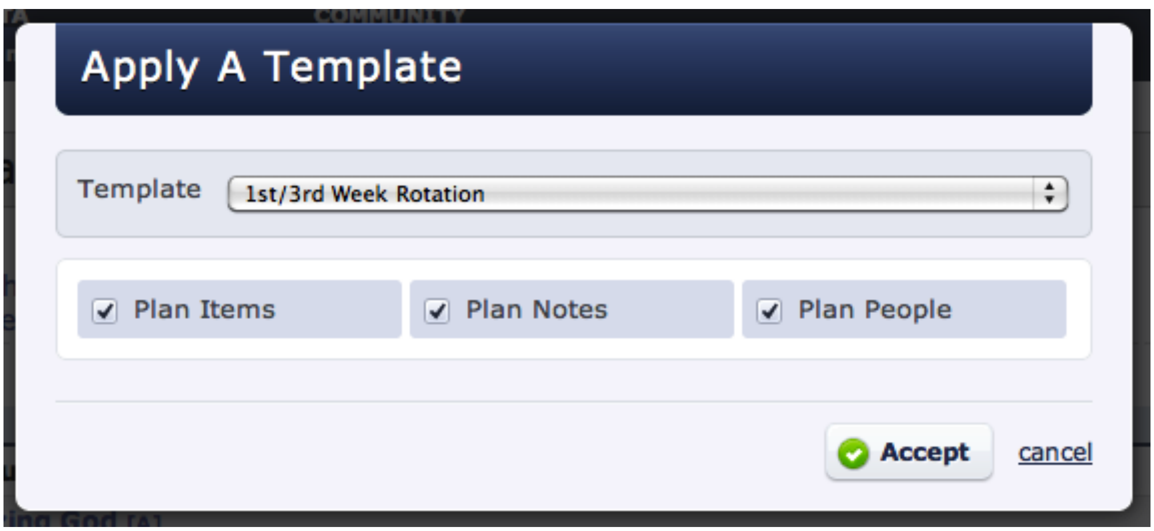


To apply a template to a current plan, first click on the plan date.



Hover over Add An Item and click "Apply A Template"

Select the template you want applied to this plan, and the options. Click Accept and the template will be applied.



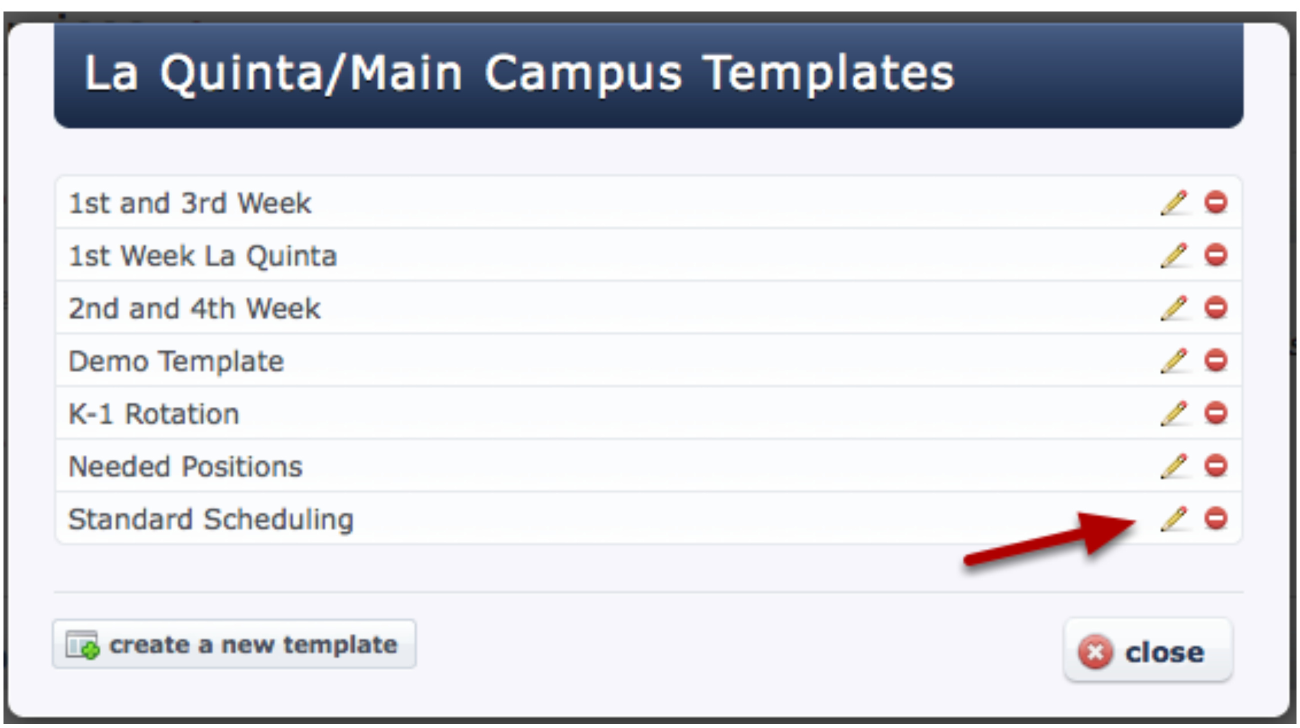
Here you can choose if you'd like the items, notes, people, or all three to be applied from the template into this plan.

Editing Or Deleting A Template

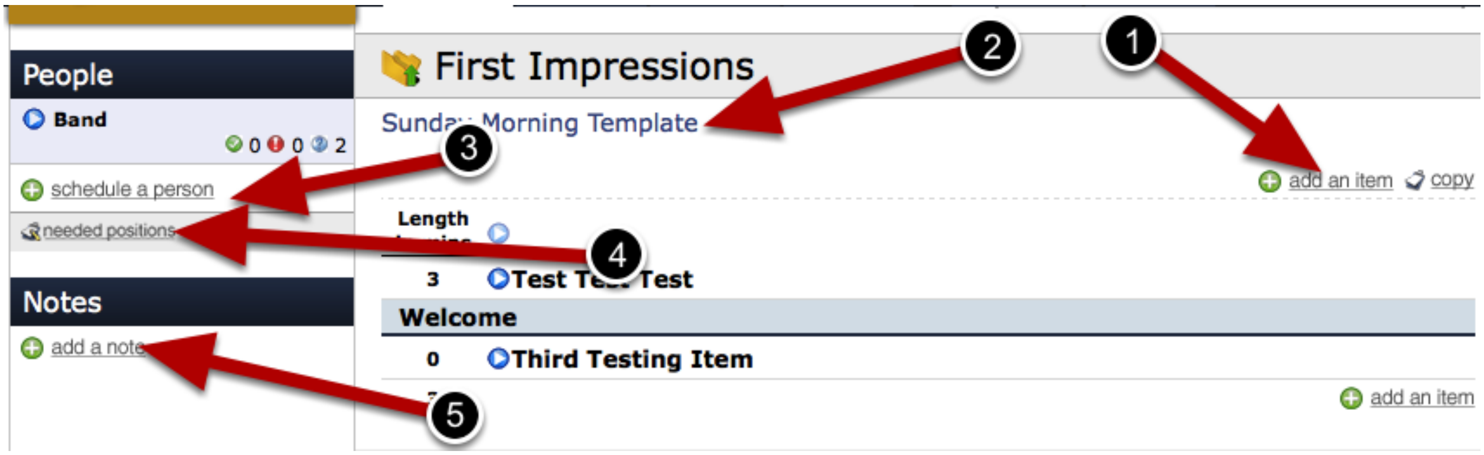
Click on 'Templates'

Note: only administrators have access to the Template link.

To edit, click on the pencil icon for that template



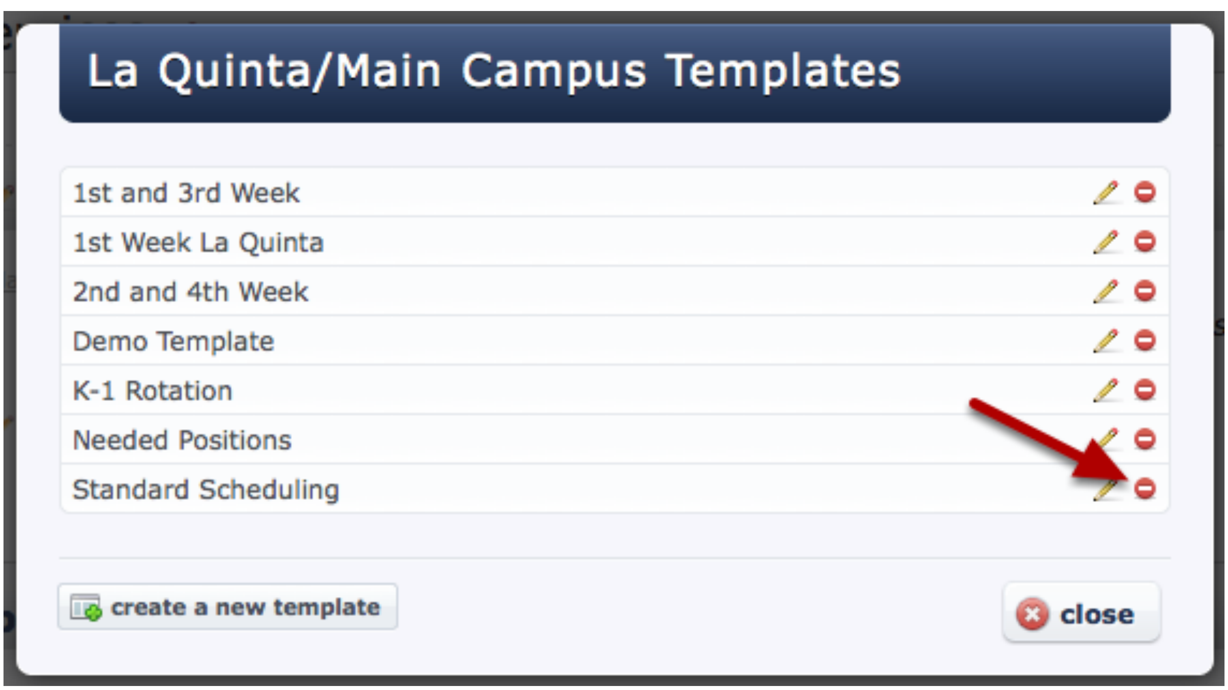
Edit your Template



You can edit areas of your template from this page. This page looks like a normal plan in your account, with a few exceptions. You cannot add any times into Templates. These are only done in the plans themselves. Here are areas you can edit:

1- Add an Item, Header, Media, or Song.
2-Edit the name of your template (just click on the current name).
3- Schedule people in the template. These people will be added to any plan that you use your template in.
4- Edit Needed Positions.
5- Add Notes.

To Delete click the red "-".

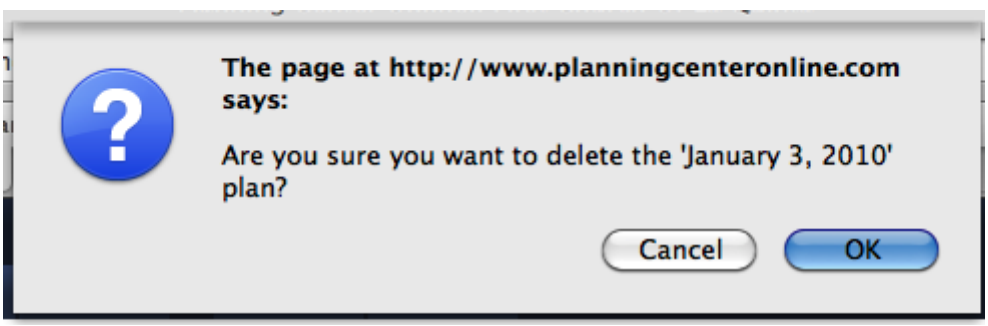


Deleting a Plan

To delete a plan, hover over the plan date.

Once you hover over the plan date, click the 'delete' button on the left.

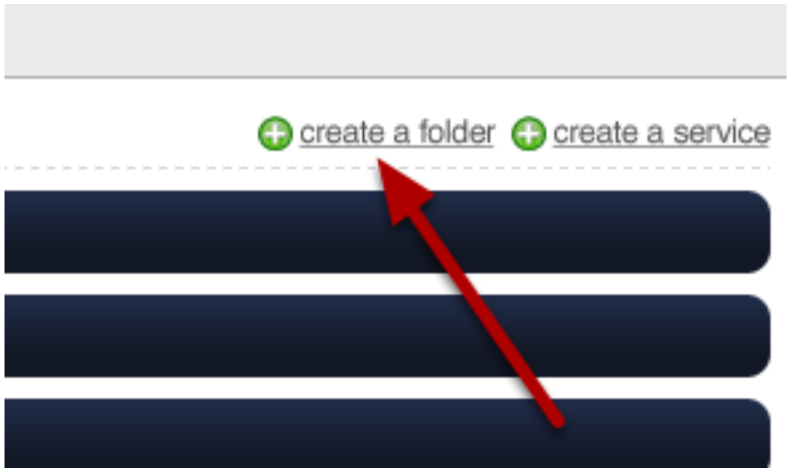
Click 'OK' to finalize deletion.



You will receive a confirmation notice making sure that you do want to delete that plan. Once the plan is deleted, there is not a way for us to recover it for you. If you're sure you want to delete it, click OK and your plan will be deleted.

Creating a Folder

A folder is a way of organizing and separating out your Service Types. They also allow you to assign permissions to people more appropriately depending on their ministry.
There isn't a limit to the amount of folders that you can have in your account.



To create a Folder, click on the 'create a folder' link at the top of the plans page.
Note: only someone with the parent permission of Administrator will be able to create a folder.

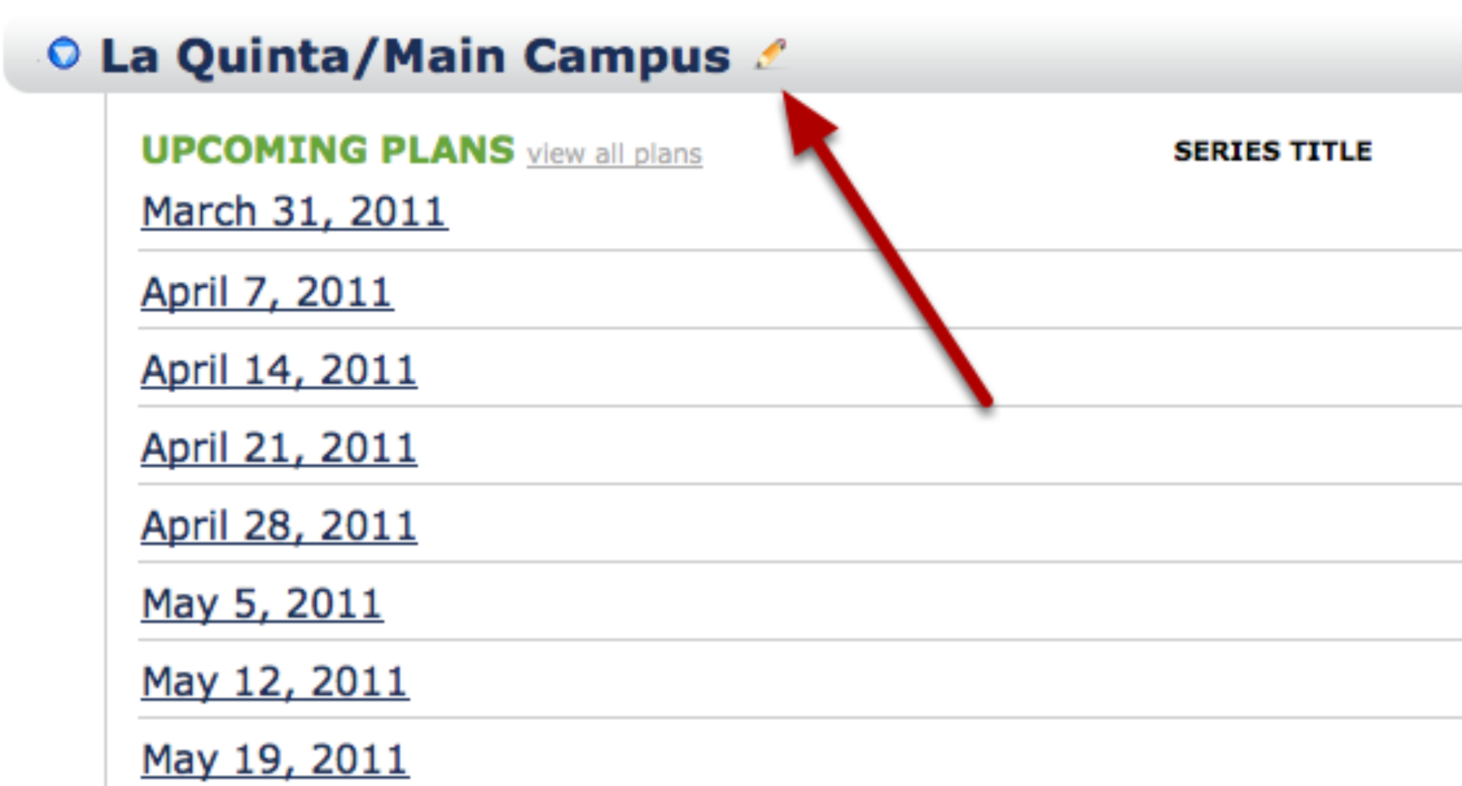
Then enter in the name of your folder and select the default Matrix view that you would like to have for it, and then click 'Accept'.

That folder will be added to your list.

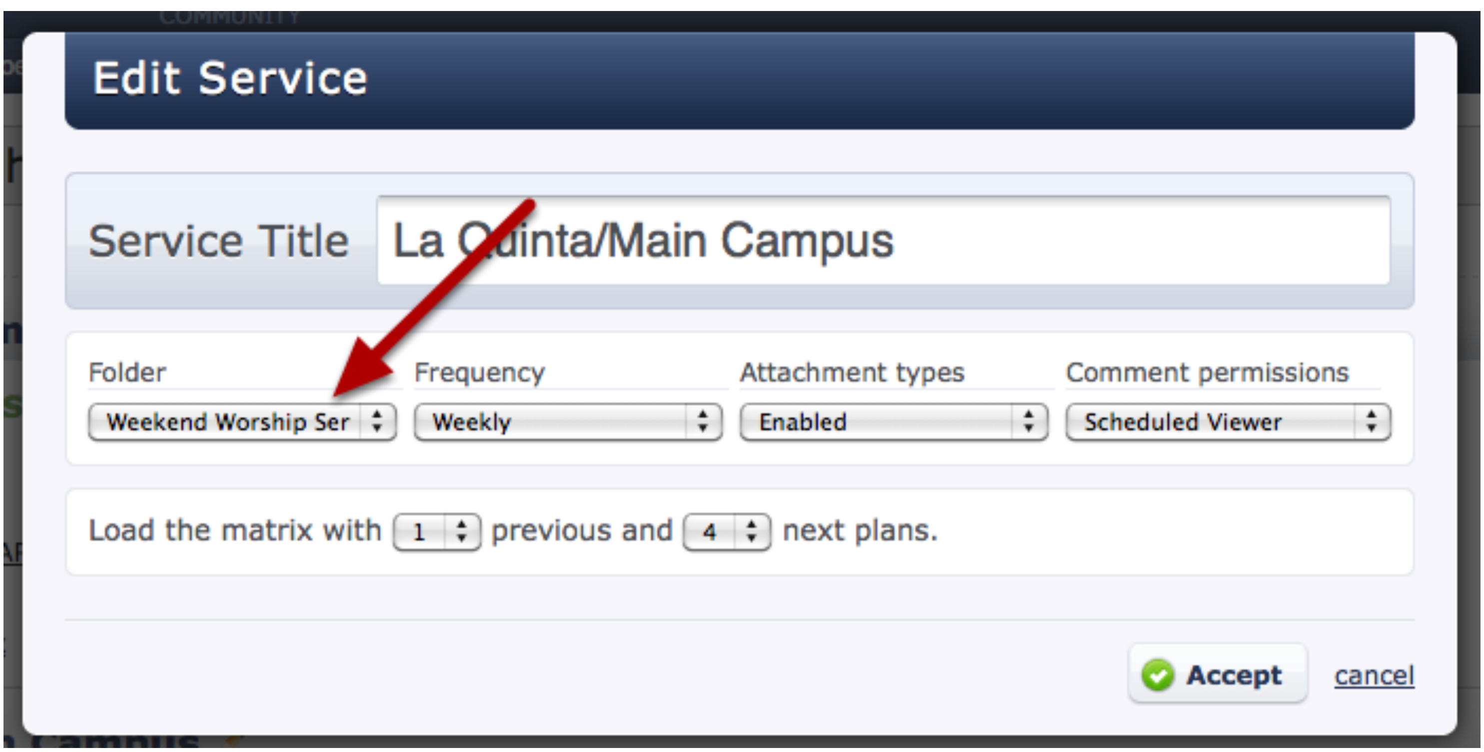
Also, see our lessons on: How to Delete a Folder and How to Move Services to a Folder

Moving a service into another folder

Click on pencil icon for that service

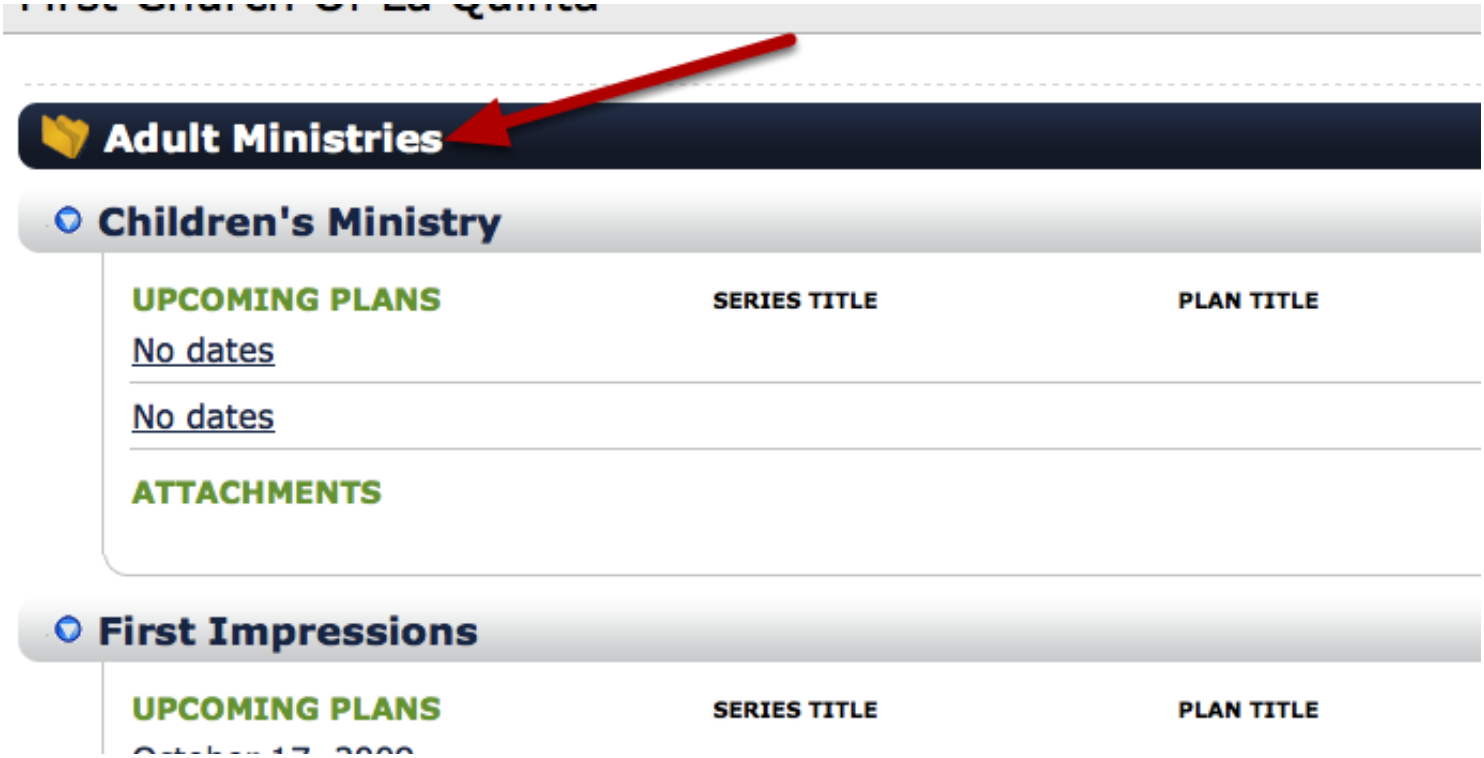


Change the Parent (folder) to the folder you wish the service to be in.



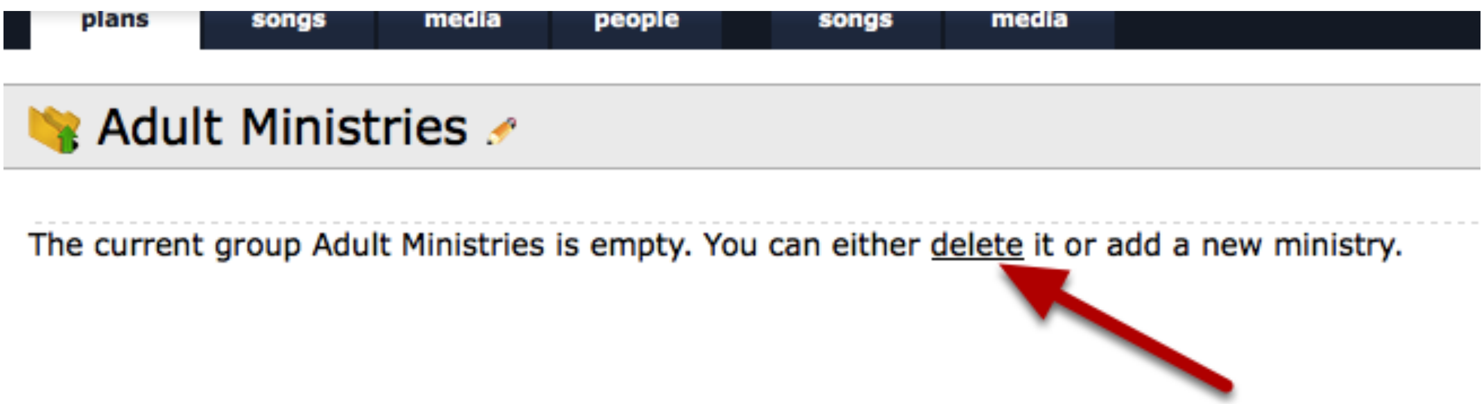
Deleting Folders

For folders with no services in them:

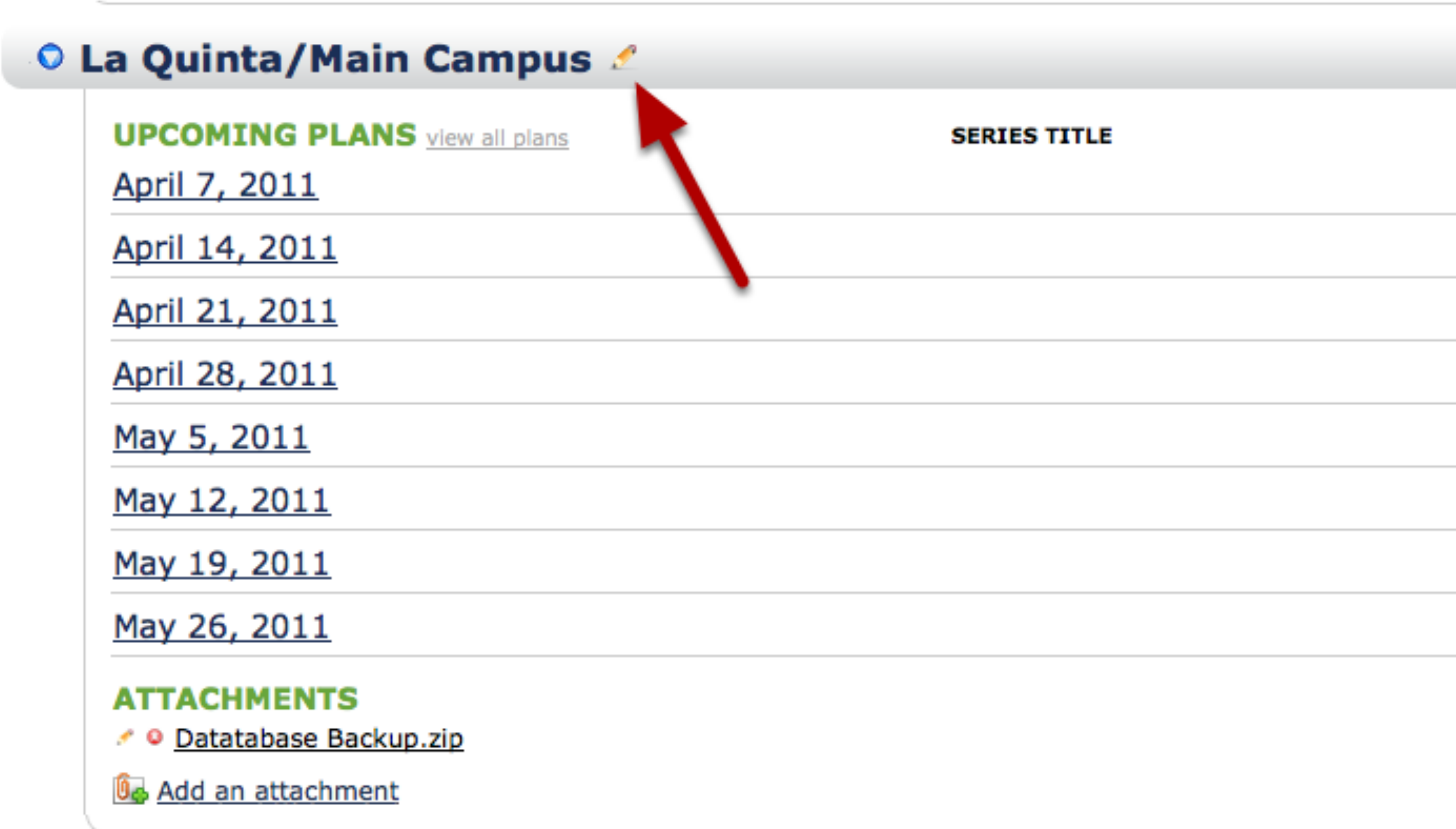


Click on the name of the folder

Click the link to delete your empty folder

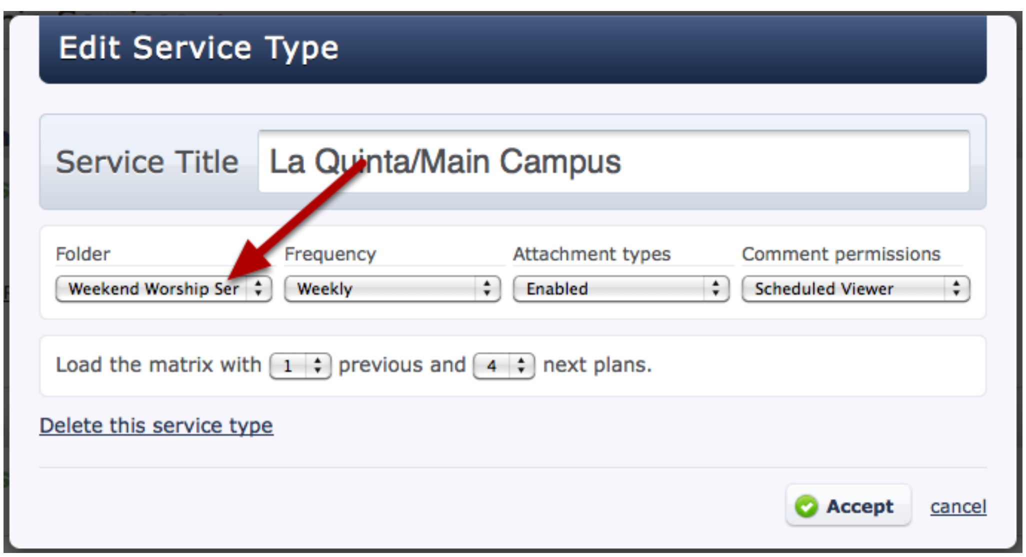


For folders that have services in them:



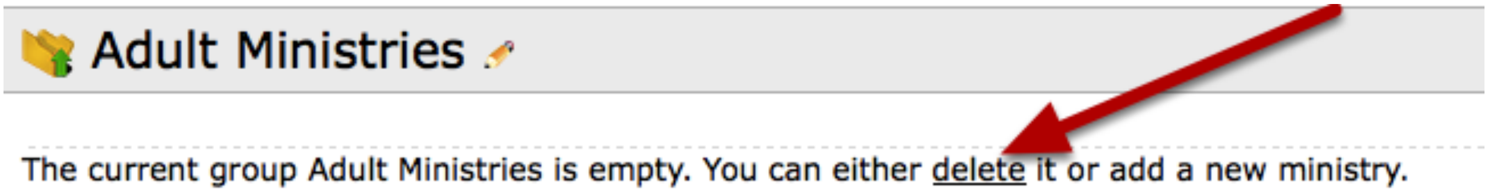
First you will need to move any services out of that folder. To do this, click on the pencil icon for that service.

Change the Folder to a different folder, or to None



This moves your service out of that folder. You will need to do this exact process for any and all services within the folder that you're wanting to delete.

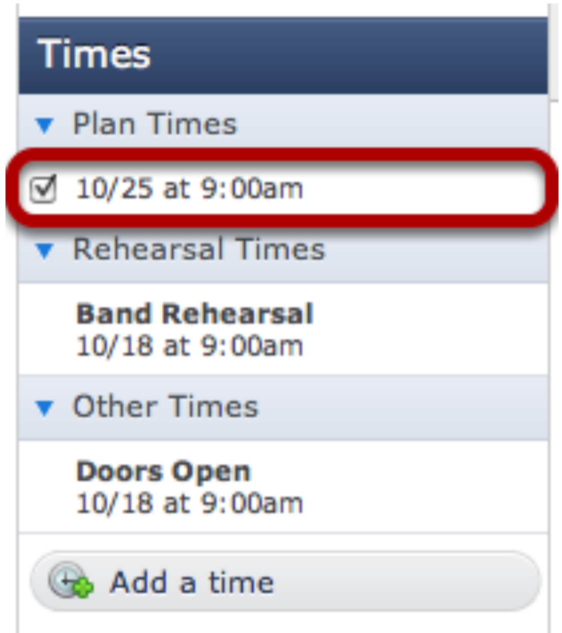
Once all services are removed from that particular folder, you can click Delete.



Adding and Editing Times

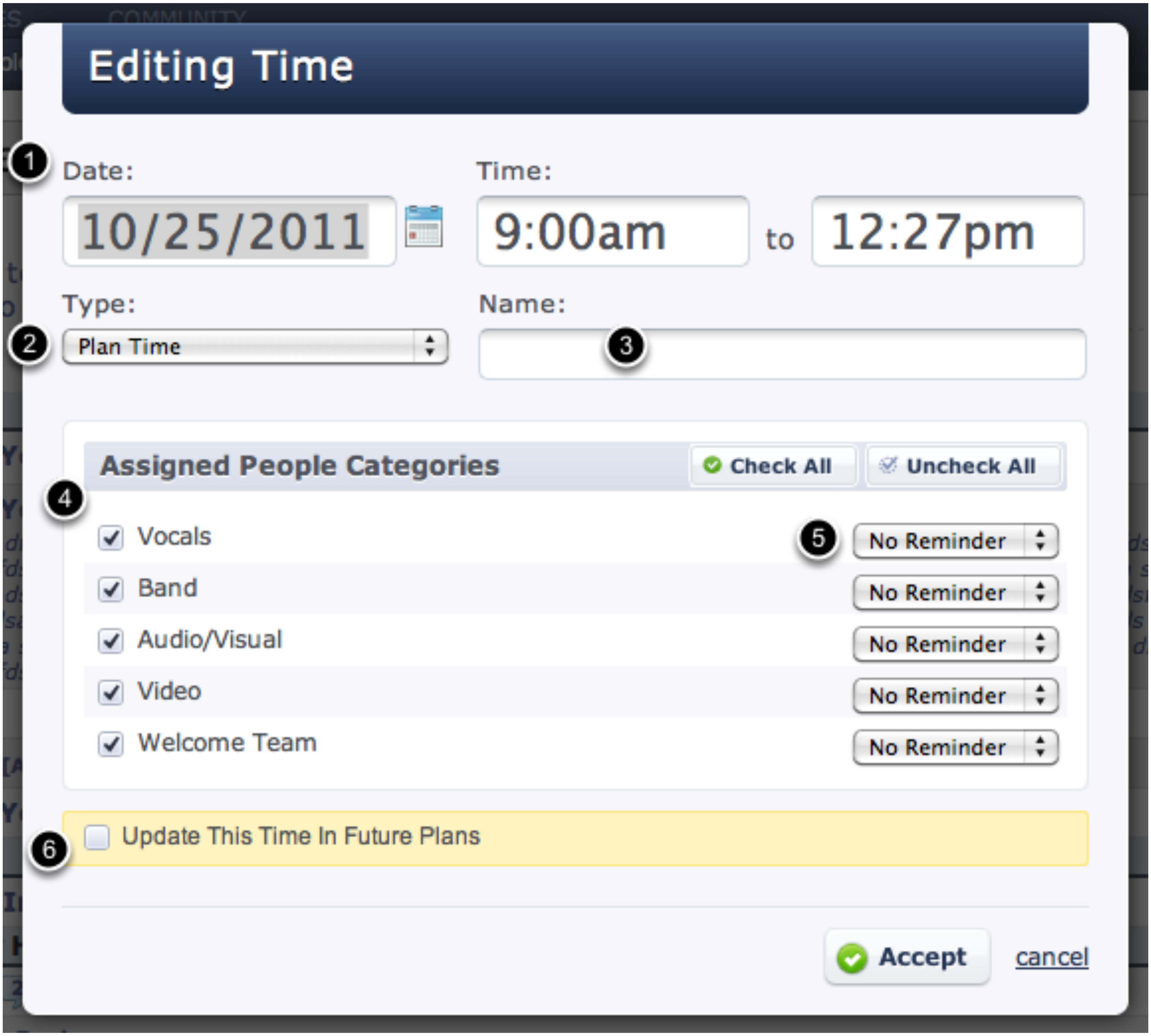
Learn how to add and edit plan times and dates, assign people categories to that time, and setup reminder emails.

To edit a plan time, click on the time



To edit a time, click on it. To create a new time, click "add a time" at the bottom of the Times section.

Time Details



1. Enter the date of your service and then the start and end time. Be careful to pay attention to "am" or "pm". If your service has multiple service times, for instance a 9:00 and a 10:30 service that are the same, just enter the 9:00 start and end time in this box, and then repeat this entire step and add the 10:30 as a completely separate time later.
2. Next choose what type of time you are creating. **Plan Times** are your advertised service times. **Rehearsal Times** are used for rehearsals, call times or times you want to meet with your teams. **Other Times** are for times you don't need to assign people to, but that you want to keep track of, like "Doors Open".
3. You can also name your times. We usually recommend naming your "Rehearsal Times" and

"Other Times" but leaving "Plan Times" unnamed, unless you need to differentiate your different services.

4. The **Assigned People Categories** section sets which categories of people will be assigned to this time by default. The checkmark next to each People Category name shows that the time you are creating should be assigned to that people category. For example, if you create a "Band Rehearsal" time, most likely you only want the checkmark next to the Band category checked since you don't need the other categories for your Band Rehearsal.
5. If you want an automated reminder email sent to people in any of your categories, choose when (in relation to this time) the reminder email should be sent.
6. If you have already created other plans in the future and are updating this time, check "Update This Time In Future Plans" to make sure any changes you are making to the time in this plan are also applied to future plans.

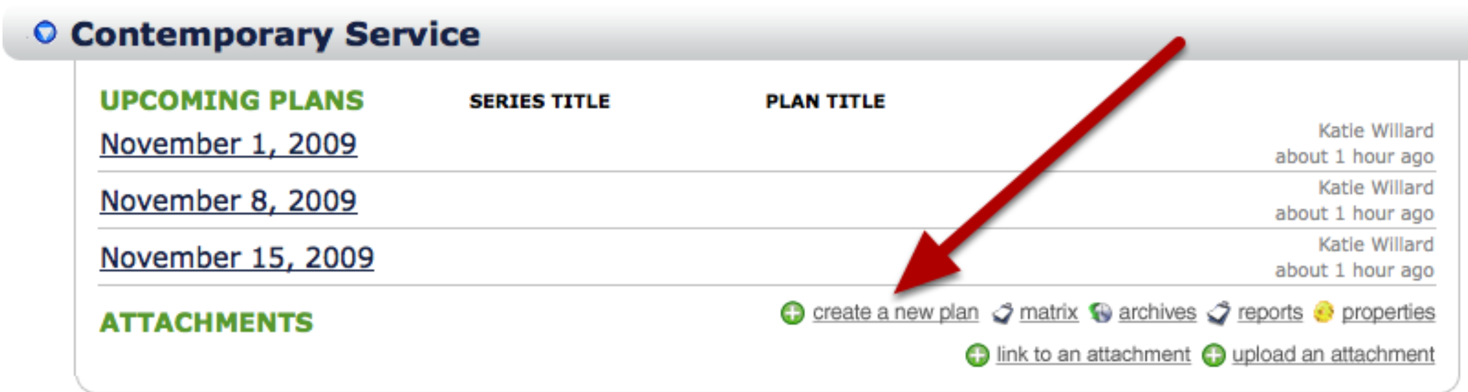
Hotkeys for Plans Page

Below is a list of the hotkeys/shortcuts while inside a Plan:

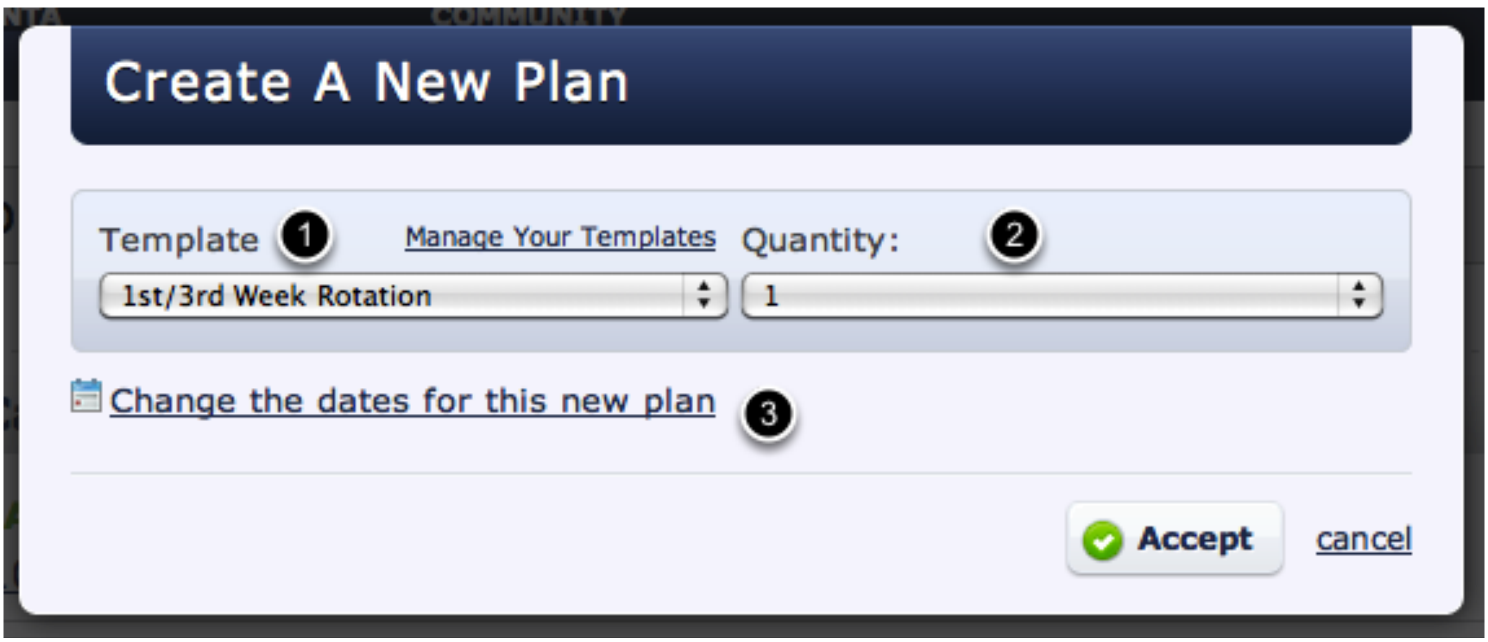
i- Add an Item
s- Add a Song
h- Add a Header
m- Add a Media
n- Add a Note
p- Schedule a Person
e- Email These People

How to Create a New Plan

Click 'create a new plan' on the main Plans page.

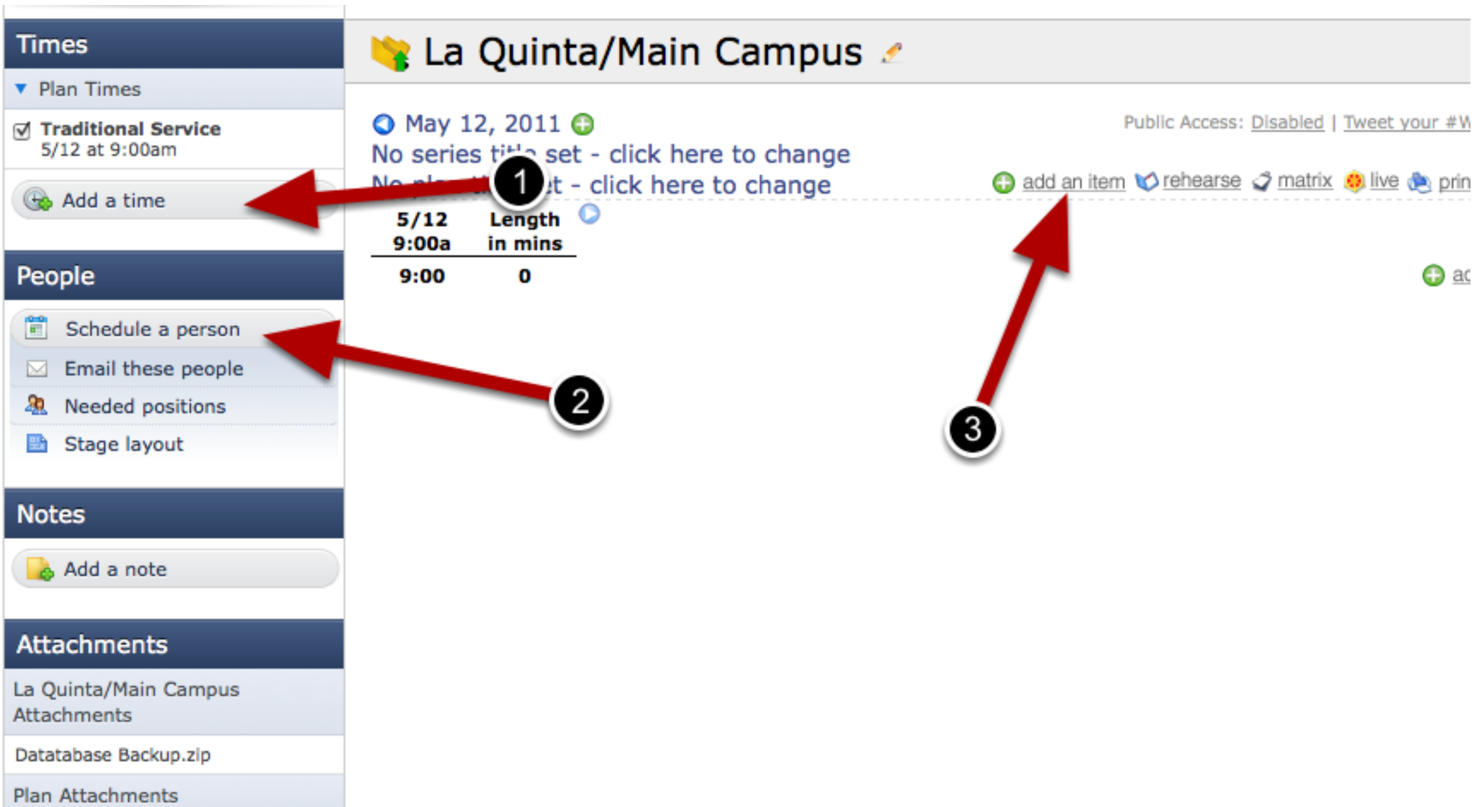


Indicate specifics



1- Template: Here is where you indicate what template you want to use, if any. If you do not have templates, leave it on "No Template".
2- Quantity: Indicate how many plans you want to create. If you're planning for the next few months, this is very convenient so you don't have to come click 'create a new plan' 8 times.
3- Change Dates for this plan: Here you can edit the date for this plan before it's even been created. If you forget to put in the correct date here, you can always change it once you're inside the plan.

Begin Planning!

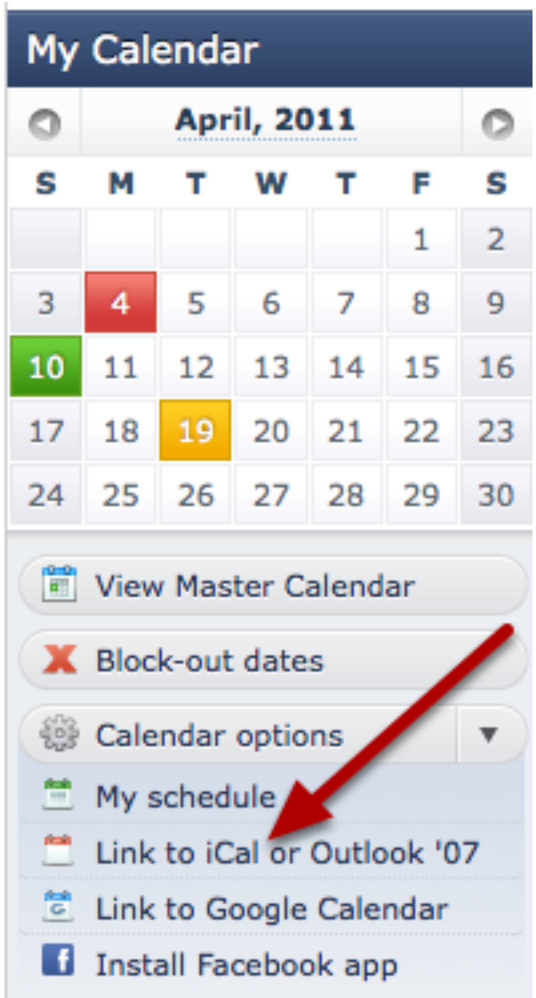


Three of the most basic features for planning:
1- Add a time (here you can add more dates/times, whether they are for this service or for a rehearsal, or just another time you want to include).
2- Schedule A Person.
3- Add an Item, Header, Song, or Media (hold your mouse over add an item to get these other options).

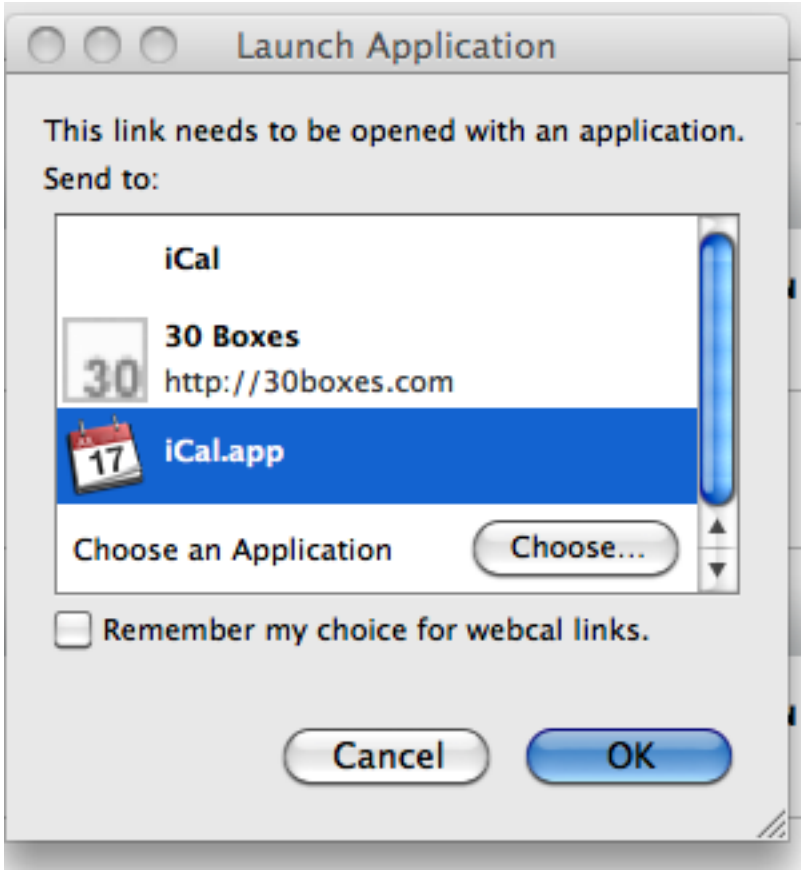
How to Link with iCal or Outlook 2007

This lesson shows you how to sync your PCO calendar with either iCal or Outlook 2007.

Expand the 'Calendar options' button by clicking on it, then click on the 'link to iCal or Outlook '07' button

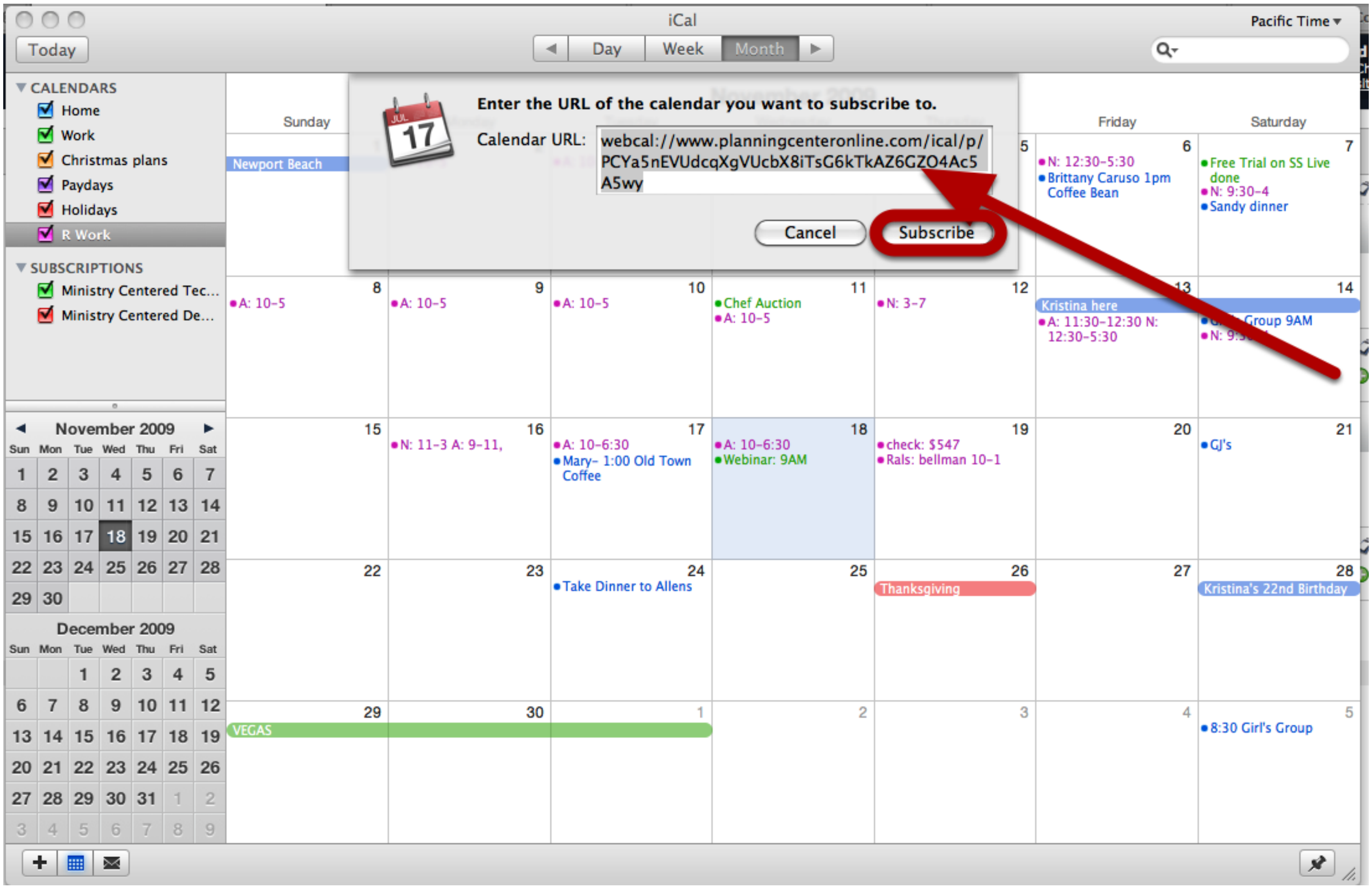


iCal Syncing:



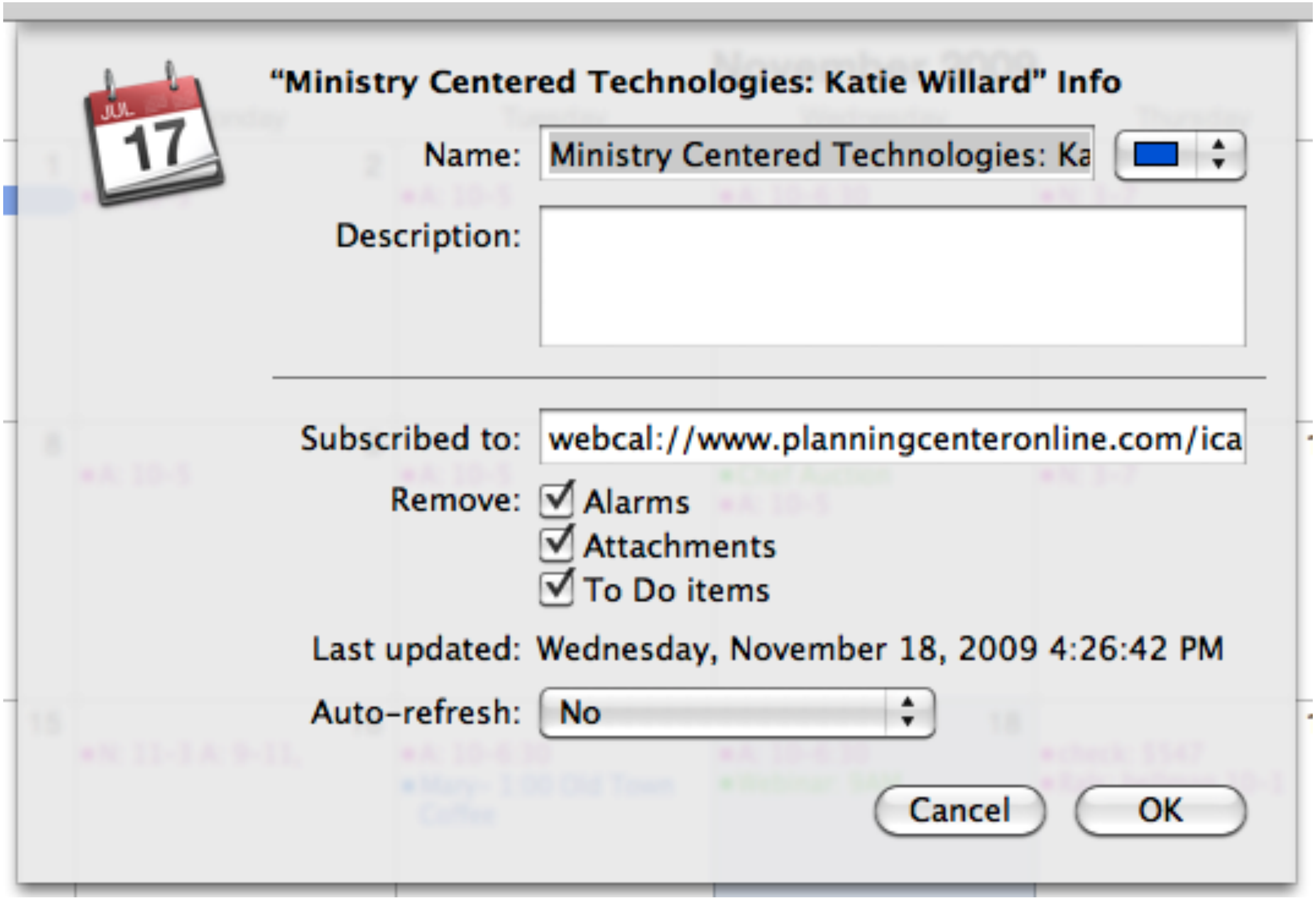
It will automatically bring up the iCal app (if you have this installed on your computer). Just click OK.

Select URL, click subscribe.



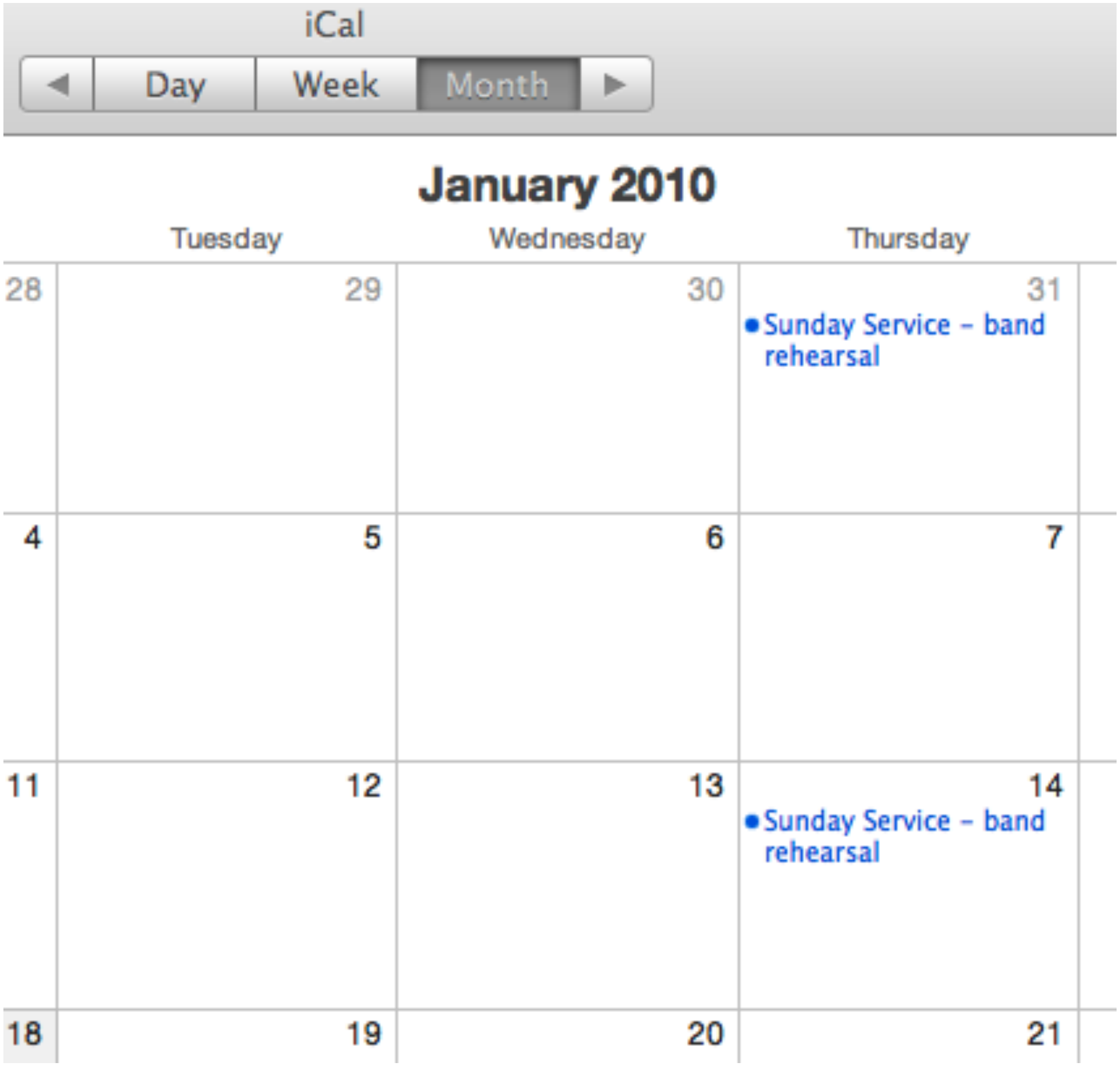
Leave the URL how it is and click Subscribe.

Indicate Options



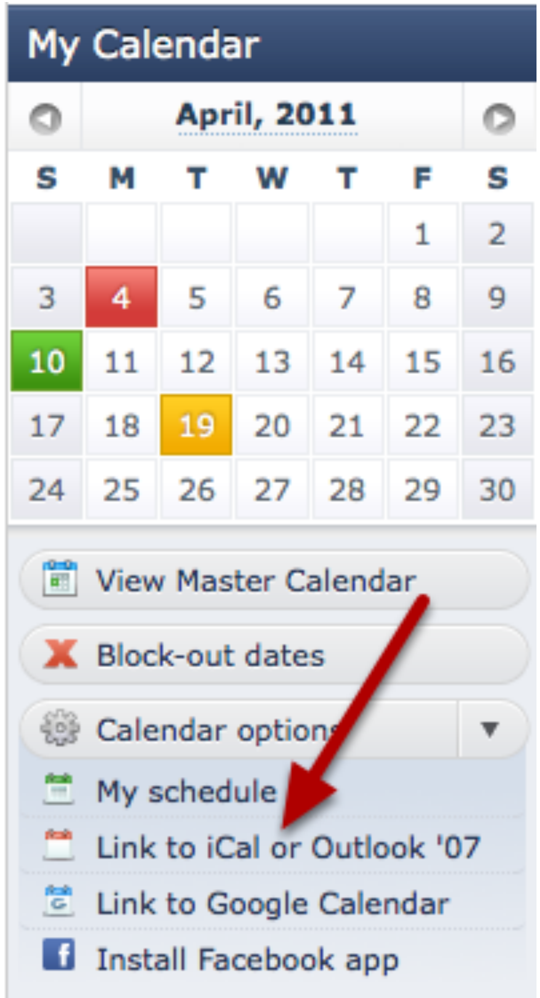
Add or change any options that are available, then click OK.

Services and Rehearsals will now be indicated.

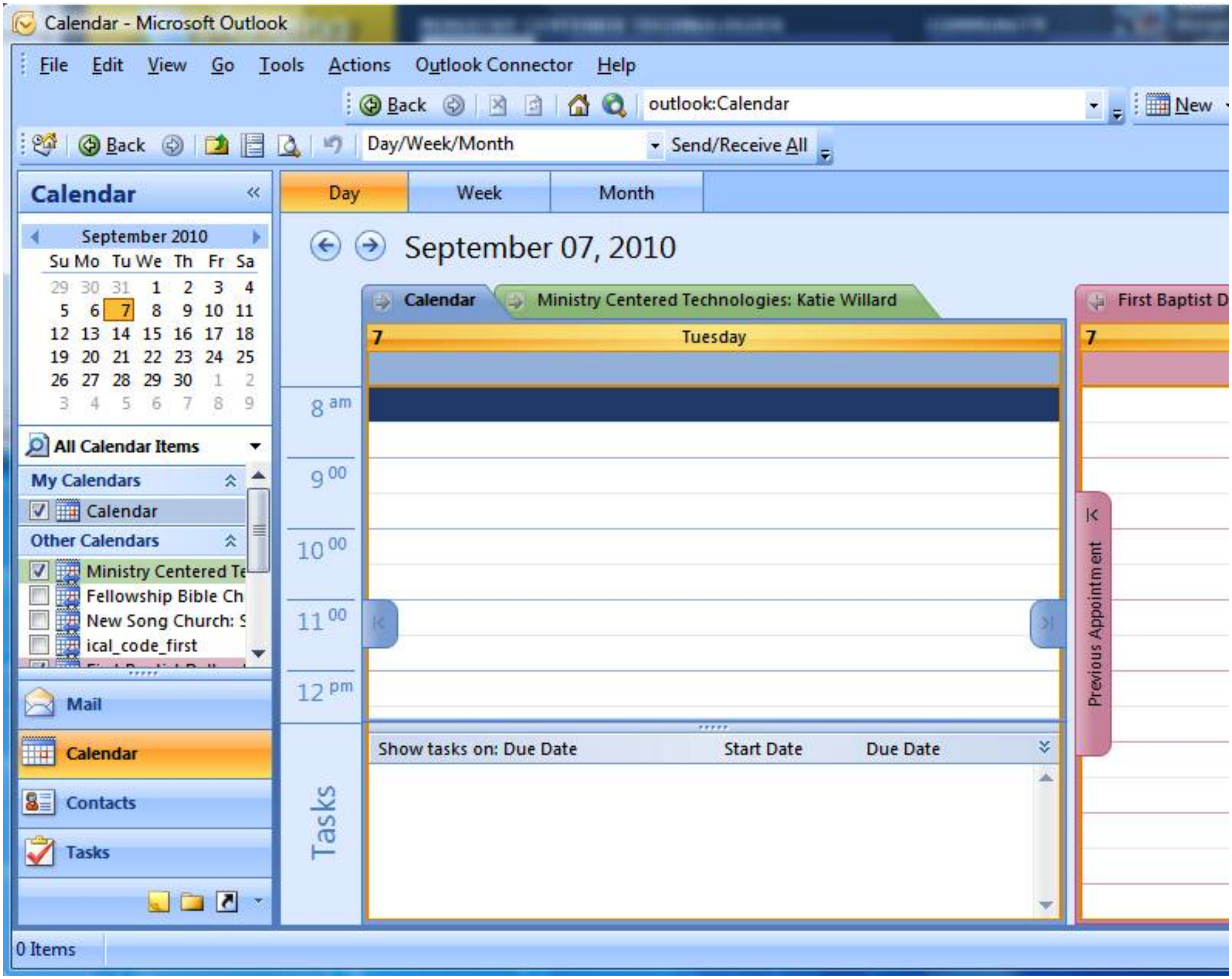


Now, whenever you are scheduled for a service and/or rehearsal, those will appear on your calendar. If you ever wish to unsubscribe to iCal, right click on the SUBSCRIPTIONS on the left and delete.

For Outlook: Click the 'link to iCal or Outlook '07' button

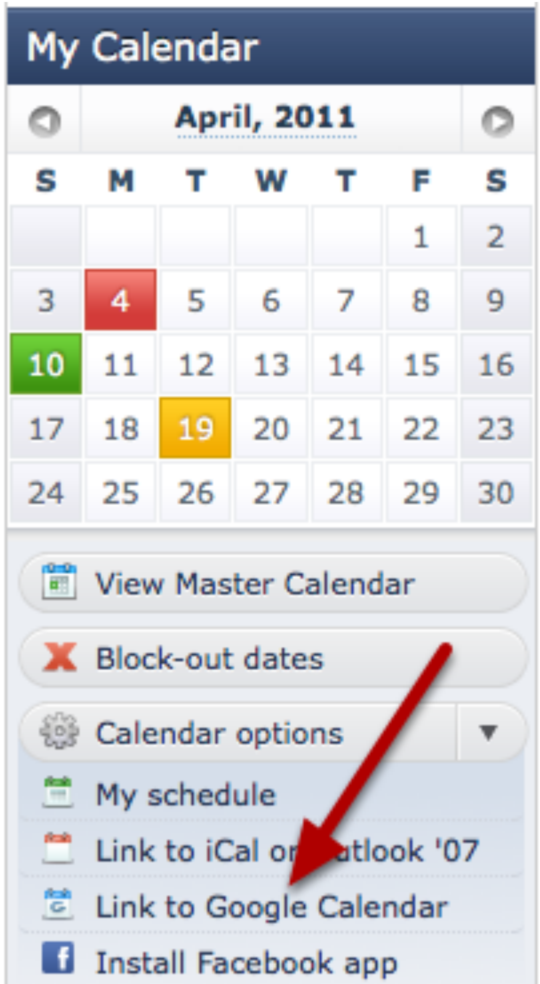


Your account will automatically be linked with your Outlook calendar.

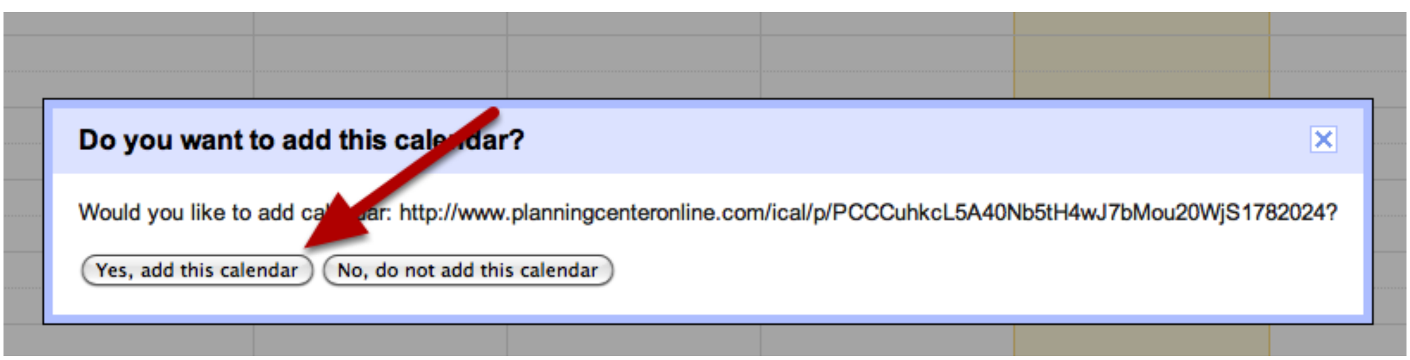


How to Link with Google Calendar

Expand the 'Calendar options' button by clicking on it, then click on 'link to Google Calendar'



Then confirm that you would like to add the calendar



Note: Google Calendar only checks for changes in subscribed calendars periodically. When using our link to Google calendar, you will have to wait for Google's server to check our server for any updates and we don't have any control over when that happens.

Rearranging the order of a plan

Drag and drop any items, songs, headers, or media from one place to another.

11/15 9:00a	11/15 11:00a	Length in mins	
9:00a	11:00a	0	**All Creatures Of Our God And King** 0 *track number 5 on CD* *Sarah sings the solo*
9:00a	11:00a	5	**Let's Get Together**
9:05a	11:05a	0	**Grace Like Rain: I Worship Flexx**
9:05a	11:05a	4	**Offering**
9:09a	**11:09a**	**9:00**	

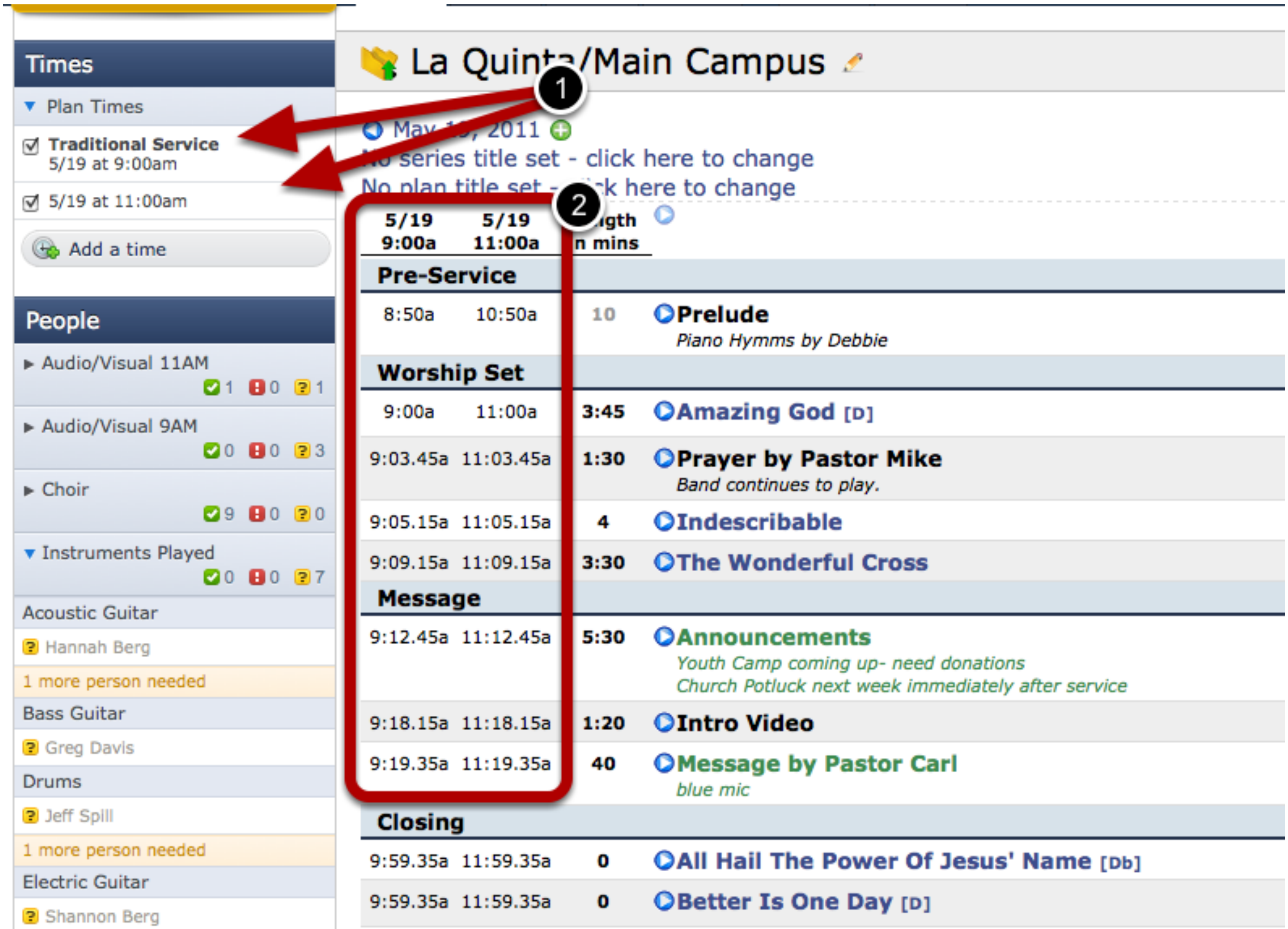
Item is moved.

11/15 9:00a	11/15 11:00a	Length in mins	
9:00a	11:00a	5	**Let's Get Together**
9:05a	11:05a	0	**Grace Like Rain: I Worship Flexx**
9:05a	11:05a	0	**All Creatures Of Our God And King** *track number 5 on CD* *Sarah sings the solo*
9:05a	11:05a	4	**Offering**
9:09a	**11:09a**	**9:00**	

Removing Items from Only One Plan Time

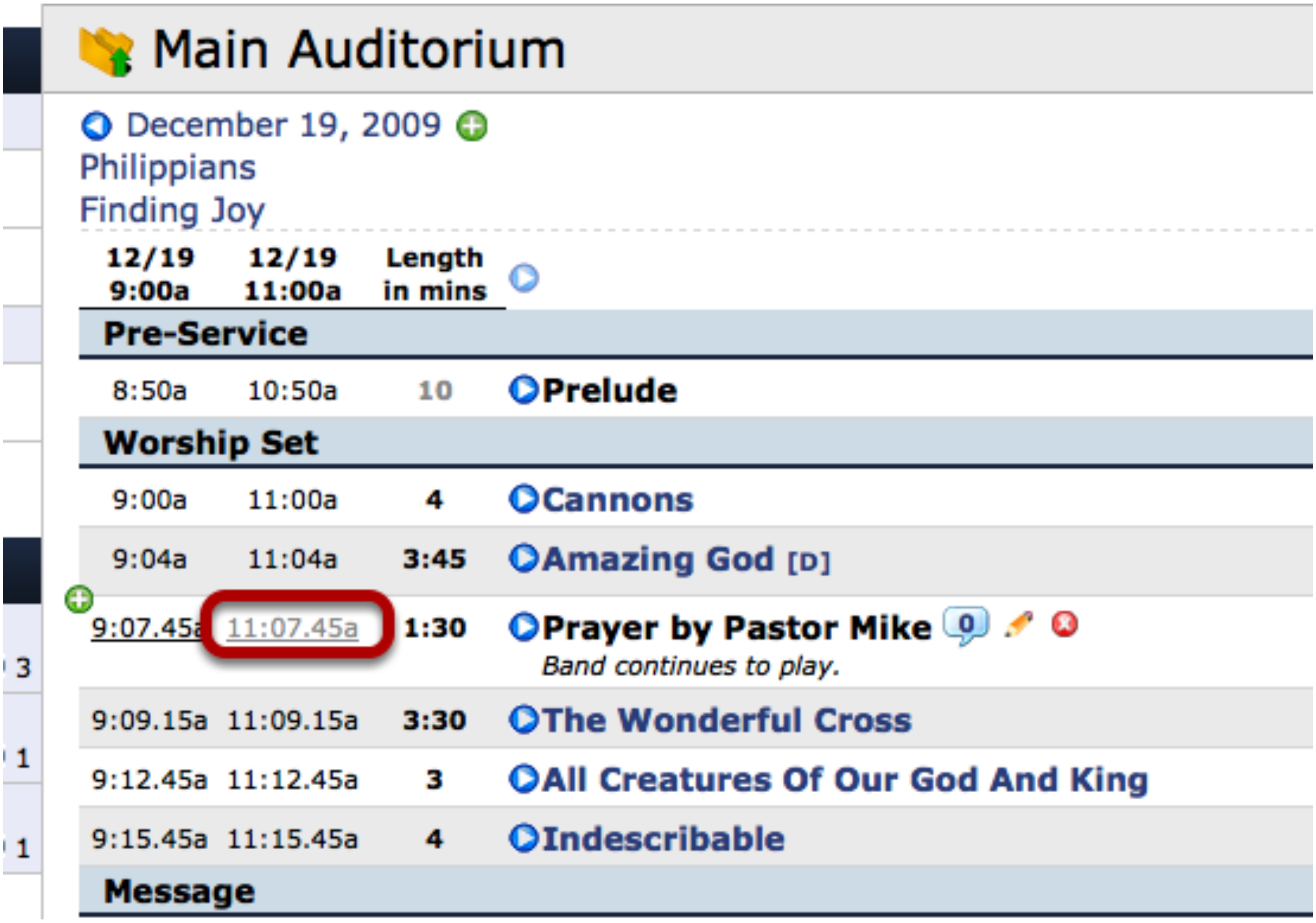
This lesson shows you how to craft your plan to reflect several times, but having an item not being applied toward one or more of those times.

Make sure all times are checked and displayed.



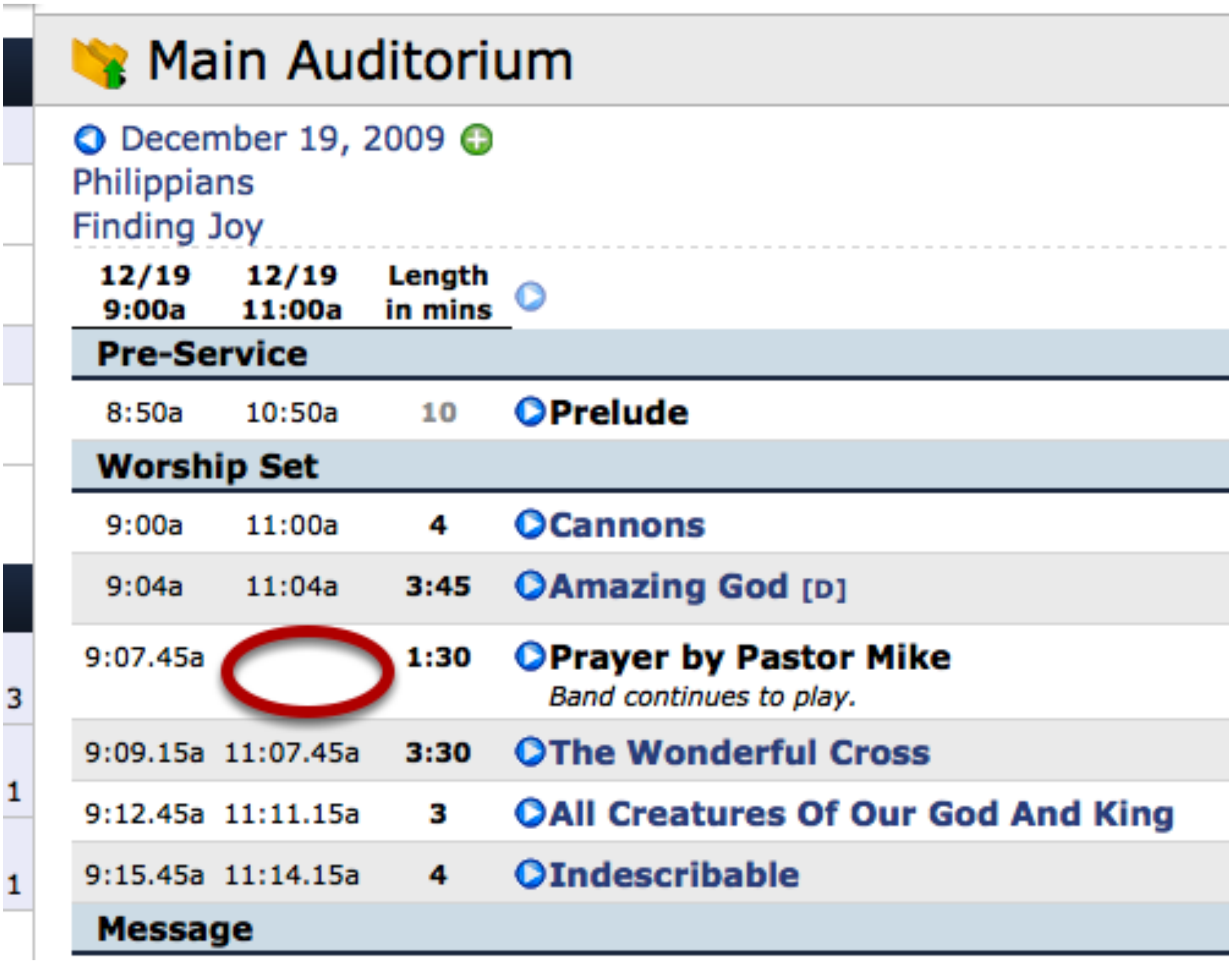
1: Both times need to be checked so that...
2: Both times will display in the plan view and update the live times for each item.

Choose which item and time you want to exclude.



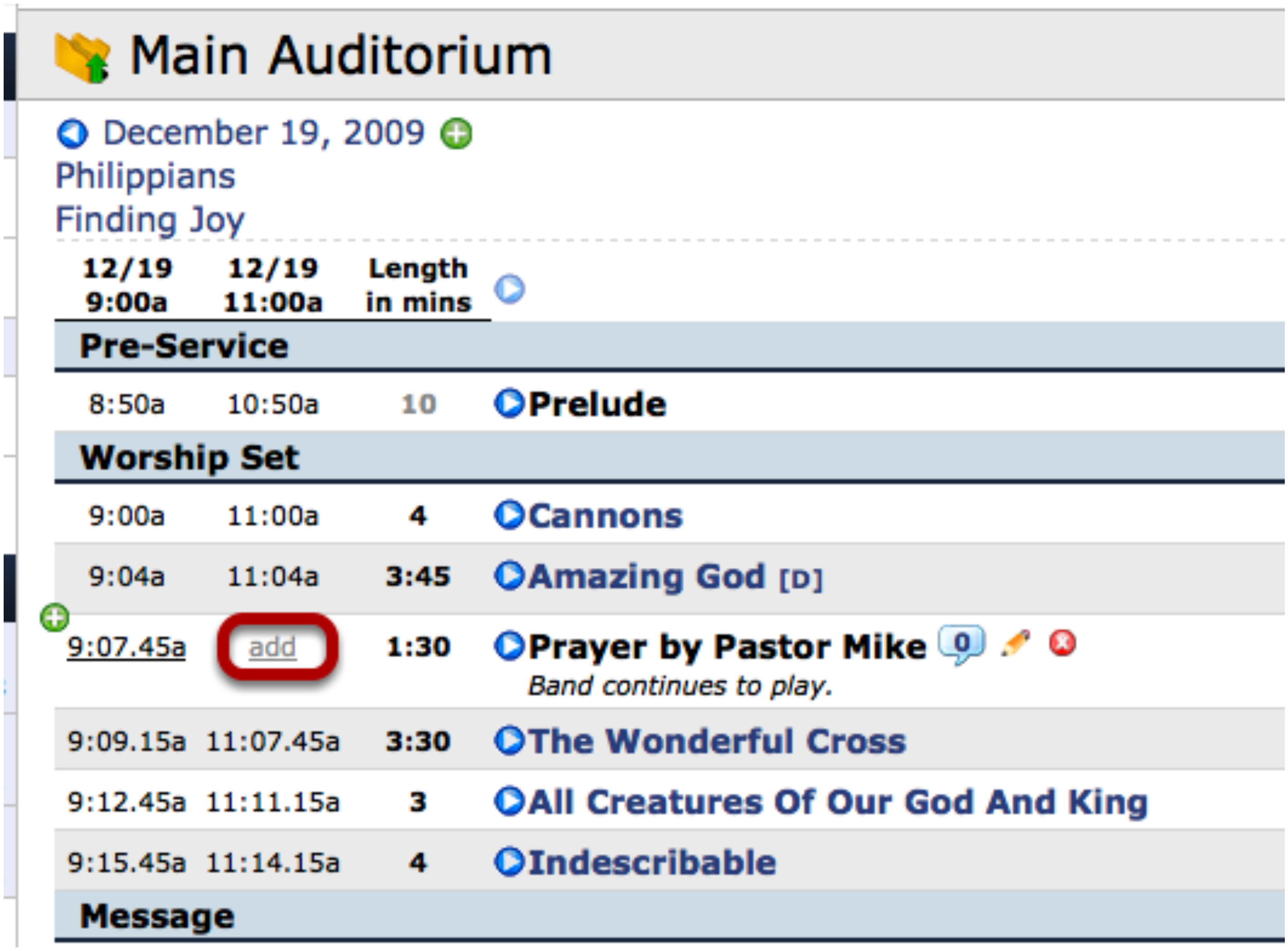
If I wanted the "Prayer by Pastor Mike" to ONLY be at the 9AM service, I would hold my mouse over the 11:00 time next to that item, and click.

Time is now gone for that item.



Now there is no time displaying for that plan time and item. The item obviously still displays in the plan, since it is still involved in the 9AM plan time, but if you were to print the plan just for the 11:00 time, it would not include that item.

To add back the time, click 'add'.

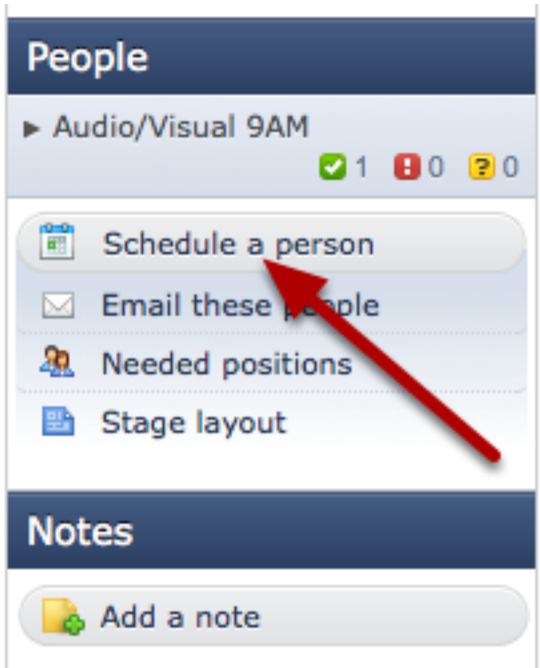


If you hold your mouse over that spot, the "add" button will come up. Click on it to add the item back to being involved in that time.

Scheduling A Person

This lesson will teach you how to schedule individual people from any plan page.

Scheduling a Person Individually - click Schedule A Person



From within any plan, click "Schedule a Person" in the People section or type the letter P.

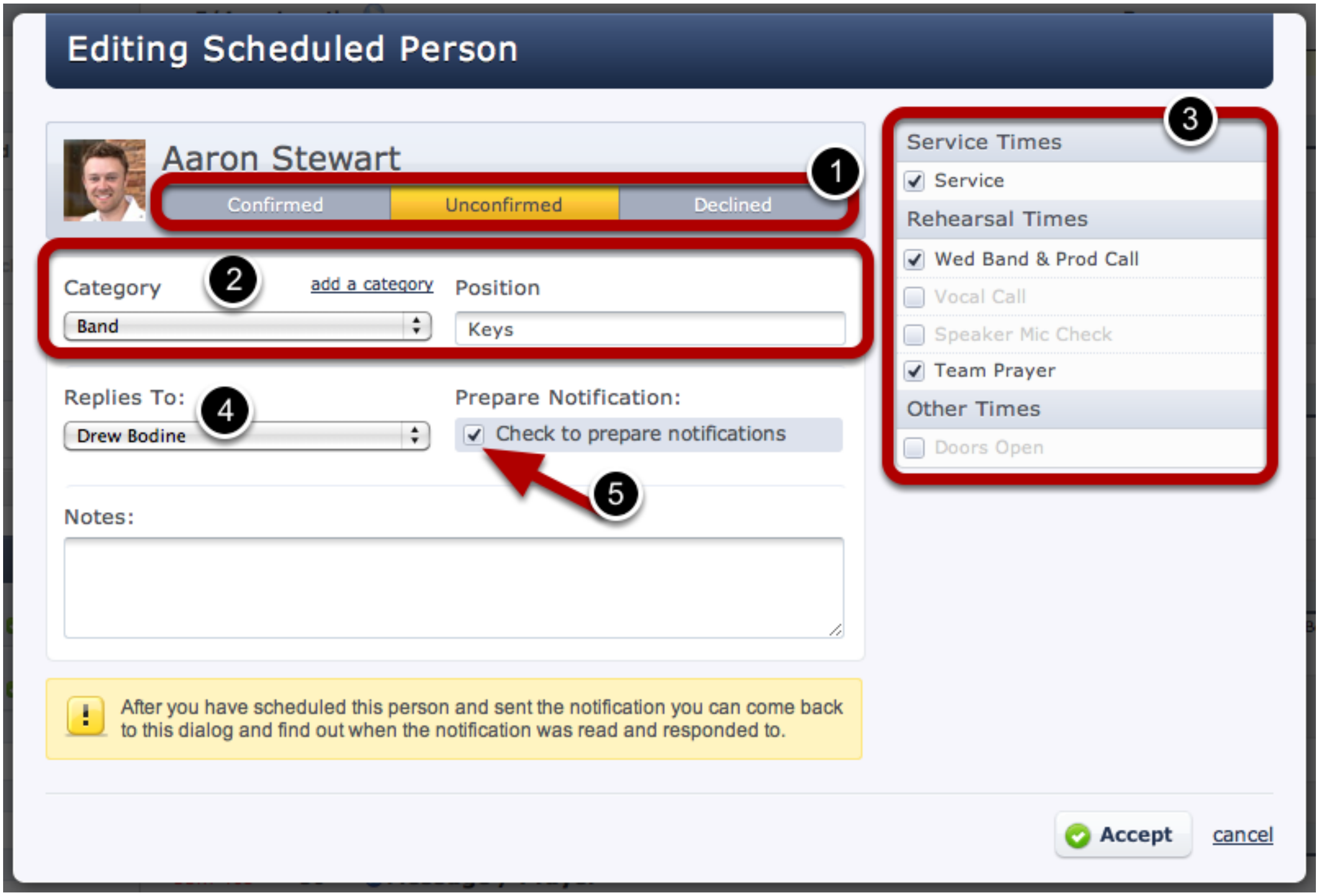
Enter a name or click to browse

If you know who you want to schedule, type their name in the search box.

Type the name of the person you want to schedule

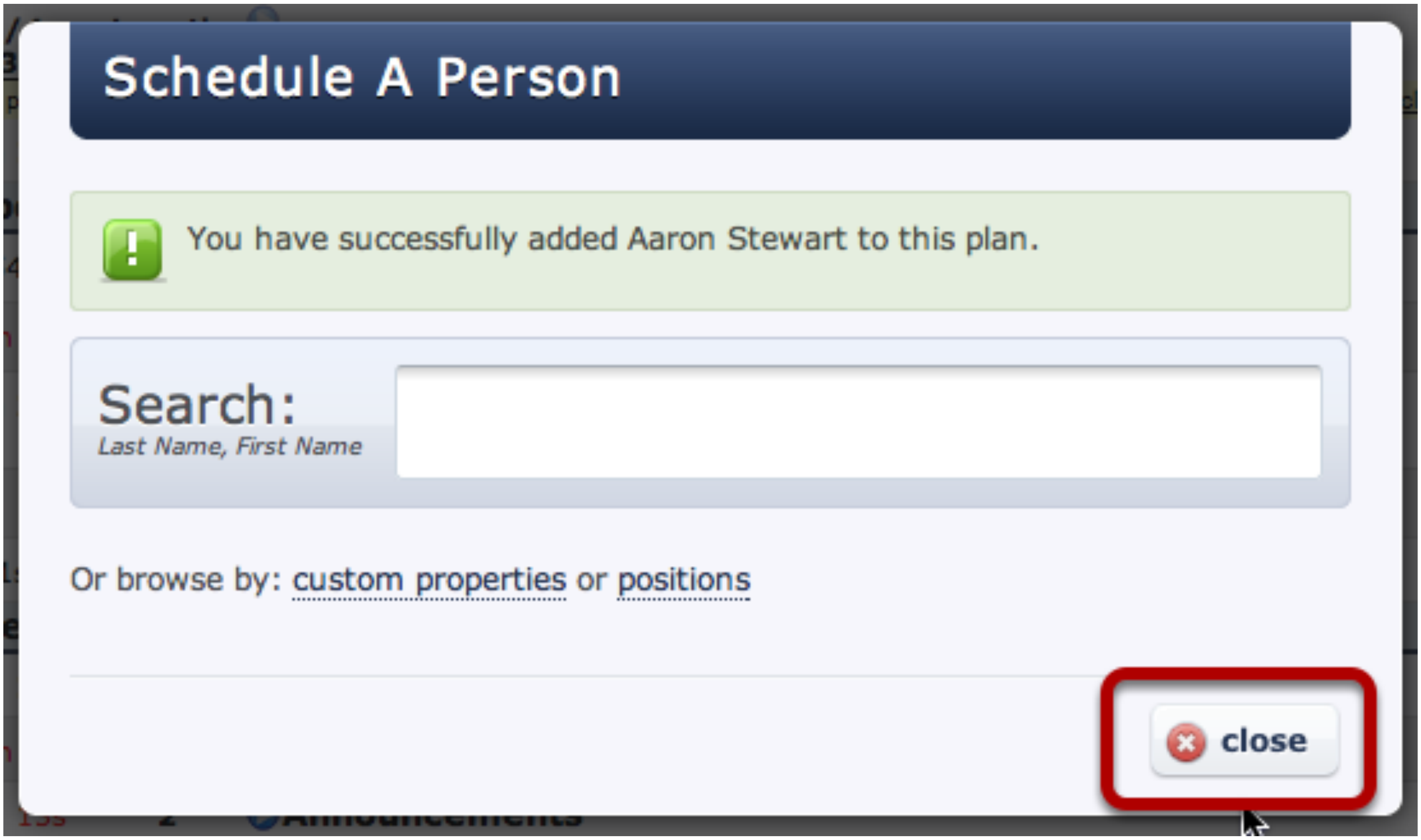
As you type you will immediately get results. Select the correct person from the list. (You can also type the name of a position or custom property in the search bar to see all people assigned to that position or property)

Edit details, click Accept



1. **Satus**: Unless you have changed the default settings for this People Category, the status will default to unconfirmed (most likely what you will want them to be). If you change ther status to confirmed or declined, when you send them an email it will not have the buttons to "Accept" or "Decline".
2. **Category and Position**: this is where you will set or edit the category and position a person is scheduled for. Click in the position box, begin typing, and a list of positions under that category will come up. You can always add your own if you'd like.
3. **Times**: Check the times you want to schedule this person for. Times that are unchecked won't appear in their schedule. You can automatically assign these times based on the category you schedule them for by reading this lesson.
4. **Replies To** person: The person who will be notified if this person accepts or declines. You can change the default Replies to person for an entire category by reading this lesson.
5. **Prepared Notification**: Make sure this box is checked if you want this person to receive an email inviting them to this plan (the email will not be sent until you click 'email these people').

Schedule Any Additional People



One you click accept, the Schedule a person box will open back up to help you schedule any additional people. When you are done, click close or hit escape.

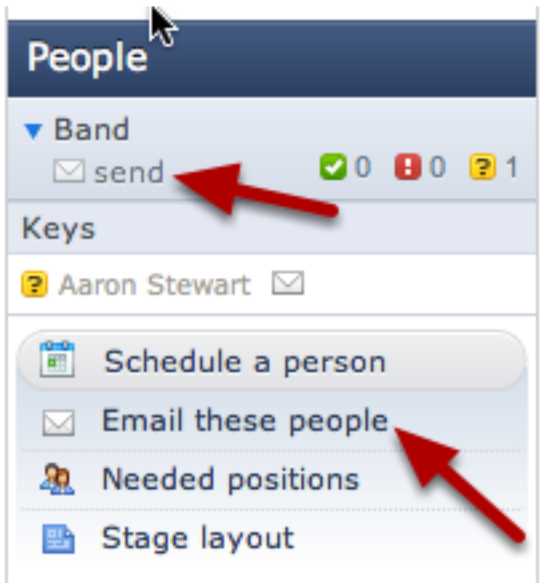
Once all of your people are scheduled, make sure you send them their notification emails. If you don't, they won't know they have been scheduled and won't be able to access the plan (unless they have a high enough permission).

Sending Notification Emails

After scheduling your people, you need to send them notification emails. This lesson shows you how.

(Plans will not show up on their My Schedule page and Scheduled Viewers will not be able to access the plan if there is a pending notification email waiting to be sent.)

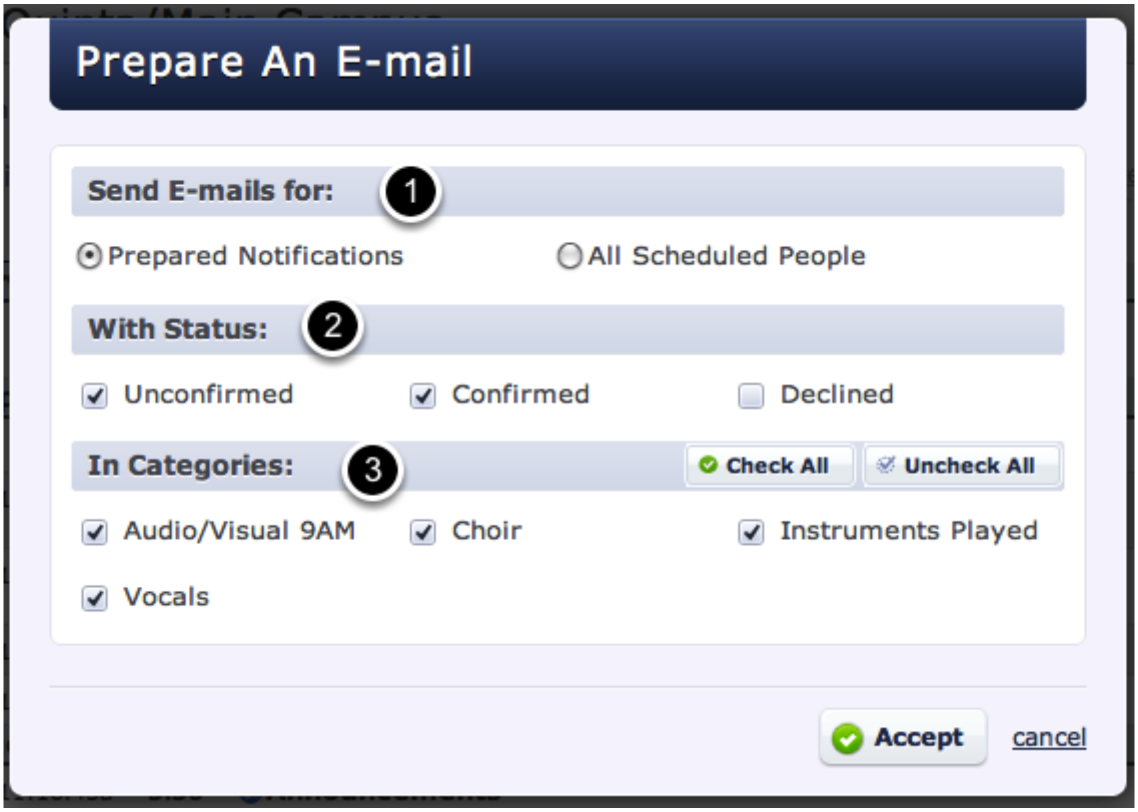
Click 'send' or 'Email these people'



Once your people are scheduled, you still need to send them the scheduling email. An envelope next to a person's name means that means there is a notification email waiting to be sent.

To send out the notification emails, click the "send" button under any Category, or click the "Email these people" button.

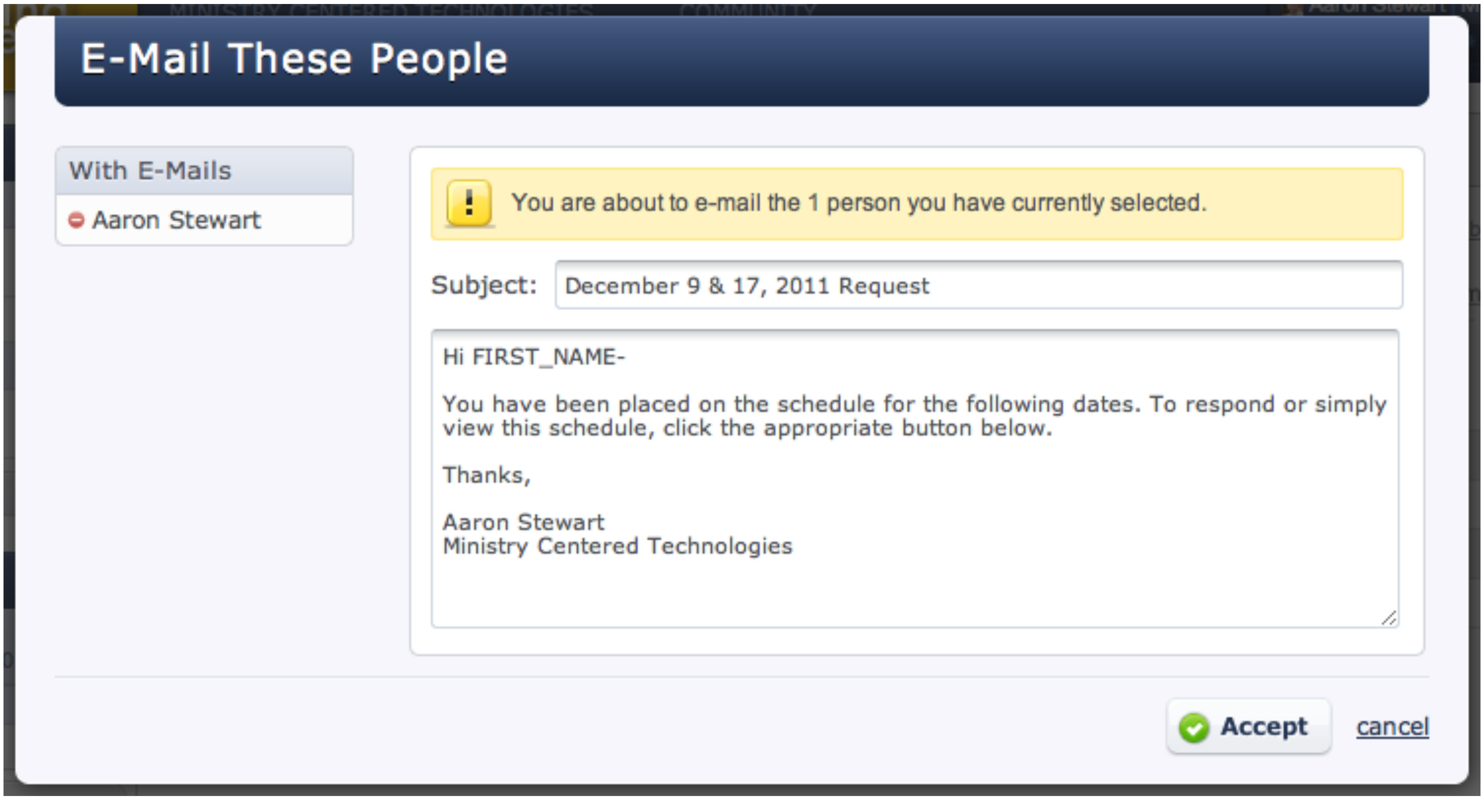
Choose Who to Email



1. Choose "Prepared Notifications" to only send to people with the email icons by their names. Otherwise send to "All Scheduled People"
2. Select which statuses you want to email.
3. Choose which Categories of people you want to email. If you clicked the "send" button under a Category in the previous step, that Category will be the only one selected, otherwise they will all be selected.

Click Accept to move on

Compose Your Email

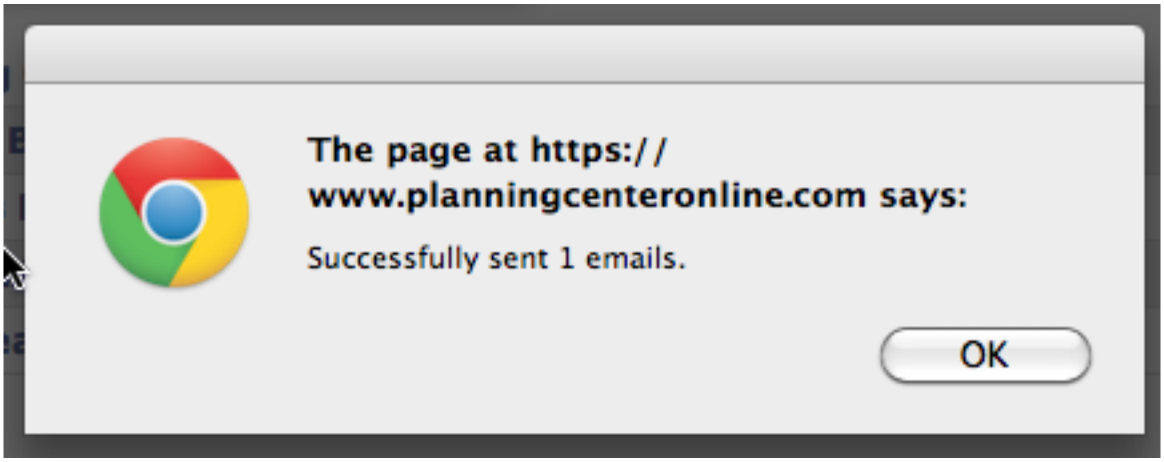


You will see all the people who will be sent this email to the left. You can click the red minus sign next to their name to exclude them when sending the email, but you cannot add additional people. Feel free to change the subject or email content. At this time there is not a way to change the default text.

FIRST_NAME will be replaced with their first name when the email is sent. You can also use LAST_NAME. The email sent will include the information on which Categories, Positions and specific Times they have been scheduled for. Unconfirmed people will have buttons to "Accept", "Decline" and "View This Service", and Confirmed People will only have the button to "View This Service".

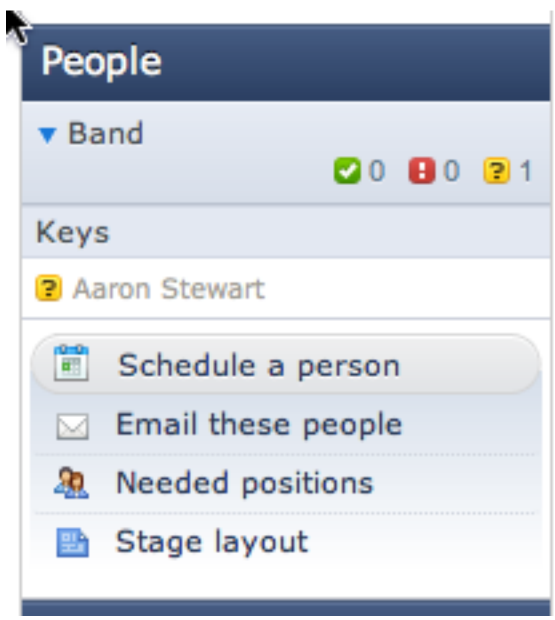
Click Accept to send the email

Planning Center confirms how many emails were sent

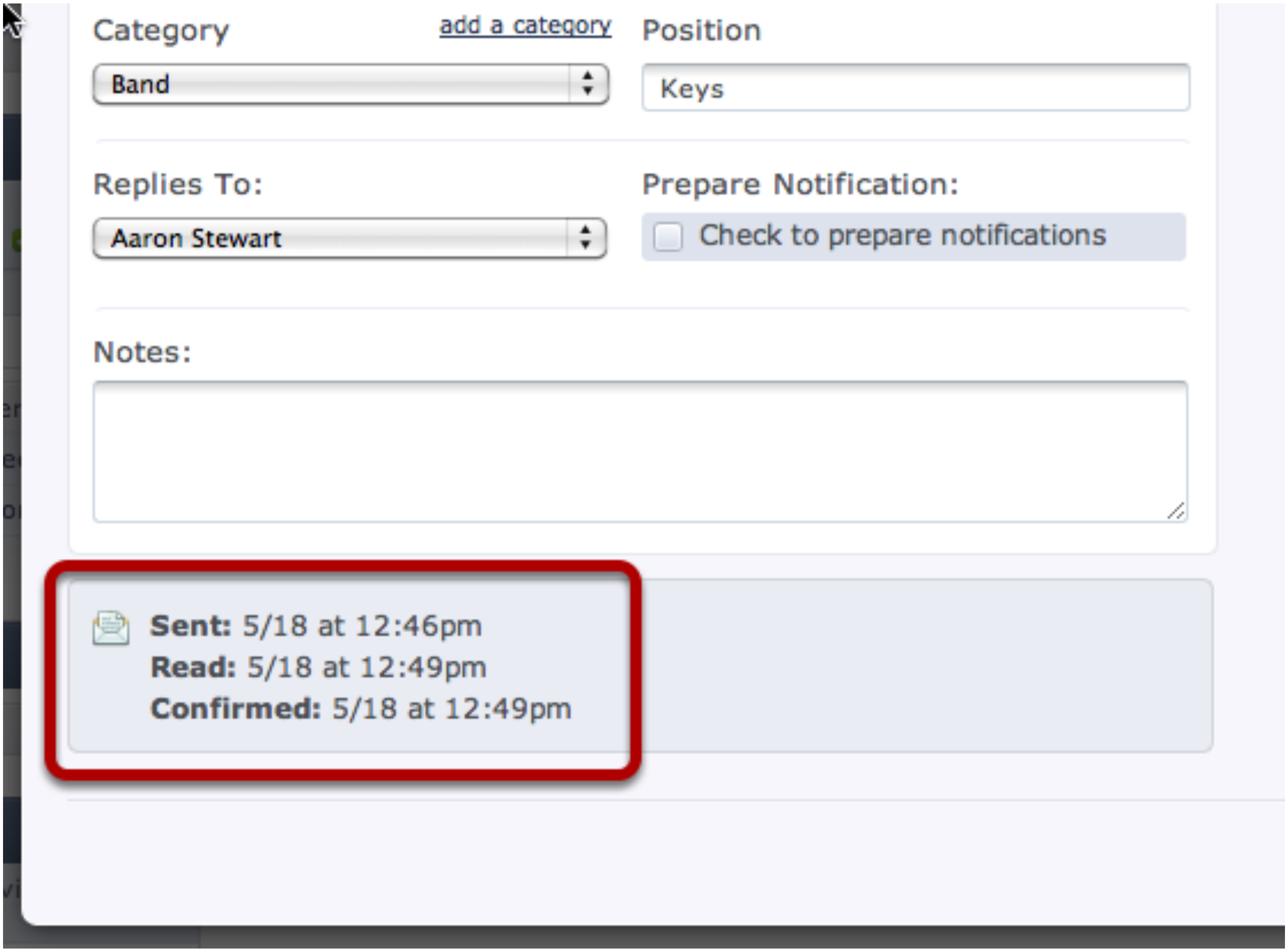


Click OK to close the confirmation box

All done!



Now that the email has been sent, you will notice the icon next to the name and the "send" button under the Category are gone. You can click on a person's name to check when the email was sent, if it was read, and what time it was responded to.

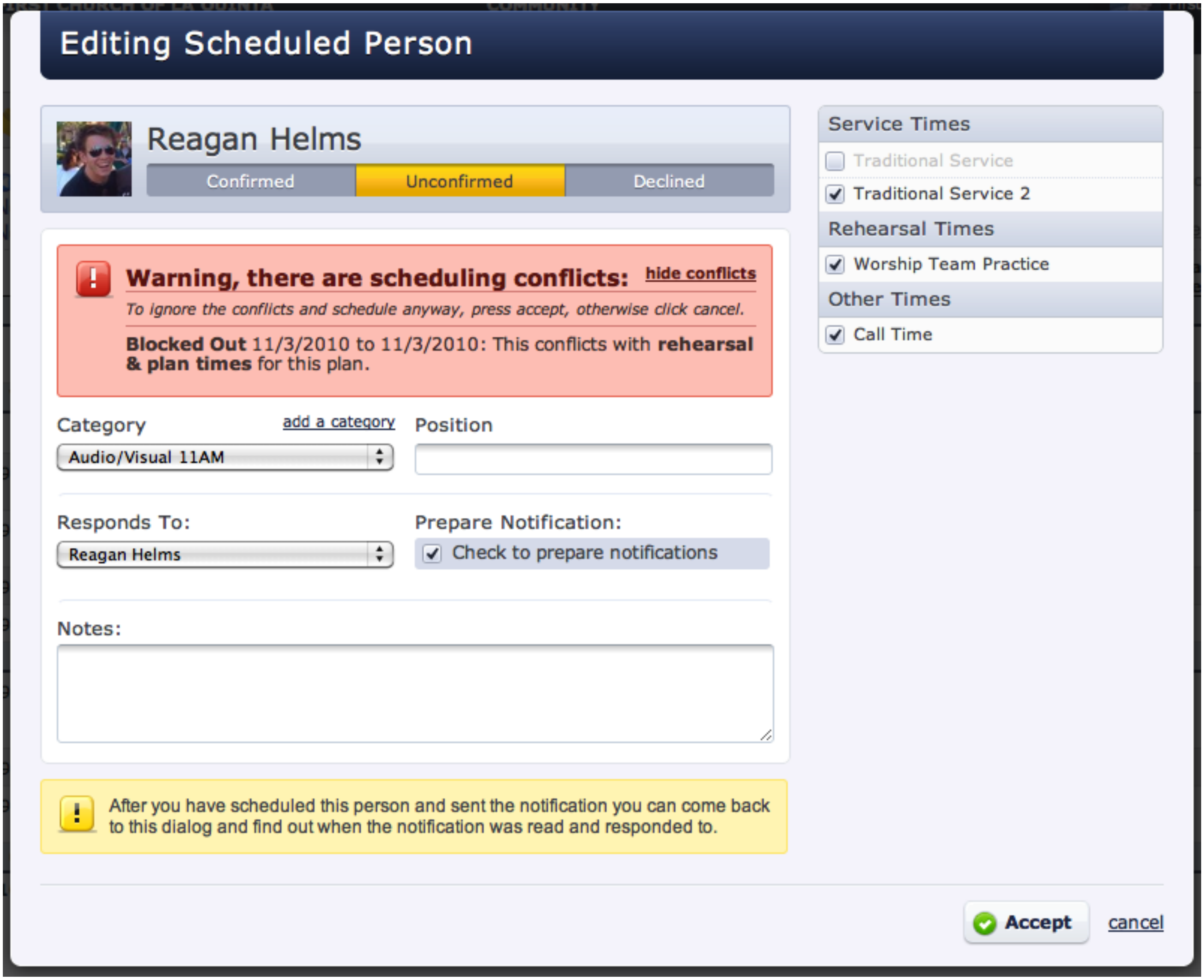


You can also check the **Recent Email** section of a person's profile page to see all emails sent to that person.

Scheduling: Conflicts and Block-Out Dates

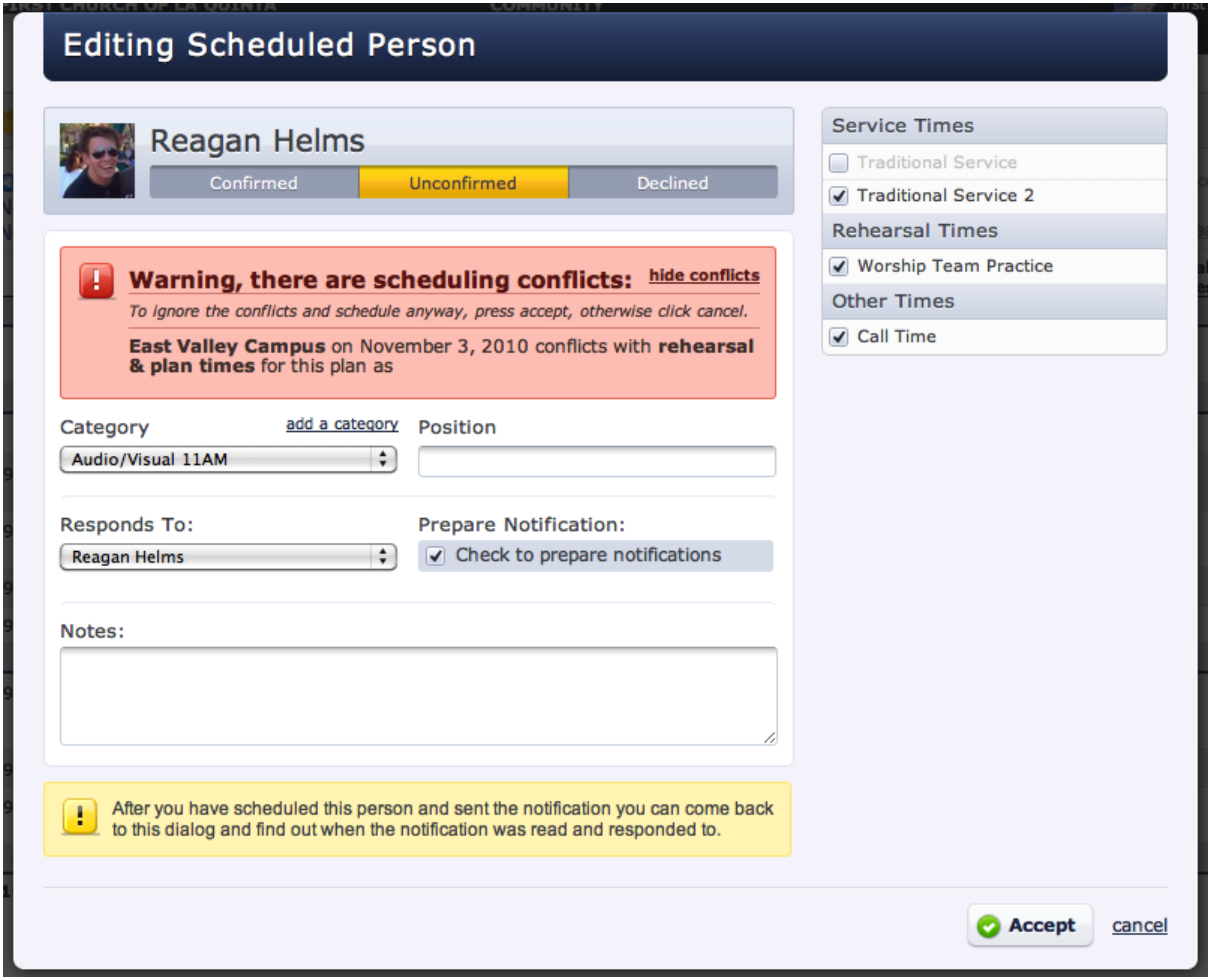
This lesson explains how to read conflicts and deal with scheduling around conflicts/block-out dates.

Block-Out Dates Conflict:



This is the warning you will get when you are trying to schedule an individual who has blocked out a date. You can choose to cancel, or, you can proceed and schedule them anyway. NOTE: If a person blocks out a date after you've scheduled them, it will automatically decline them and send you an email letting you know.

Conflict:

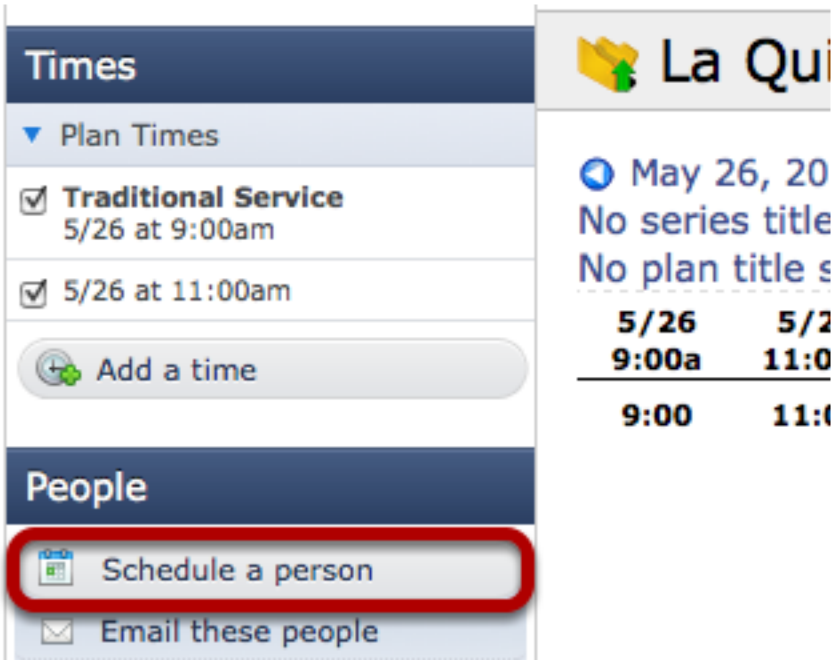


If you see a conflict, it will tell you on what other date and for which service this is an issue if you click 'show conflicts'. If you are unsure of the conflict, look at the date of the conflict and go to that plan. Compare all times with the times in this plan and make sure that no minutes are overlapping.

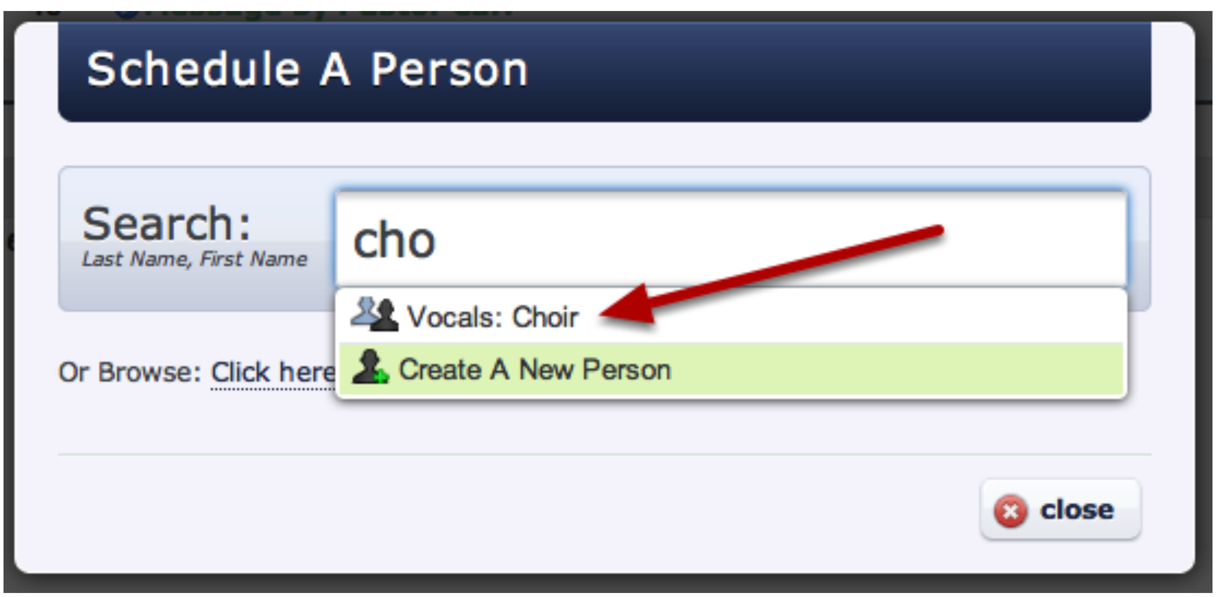
Scheduling Groups or Teams

This lesson shows you how to schedule a whole group or team of people at one time, without having to enter in each individual name. If you haven't created your groups or teams, see Creating groups or teams for Scheduling.

Inside your plan, click 'Schedule A Person'.

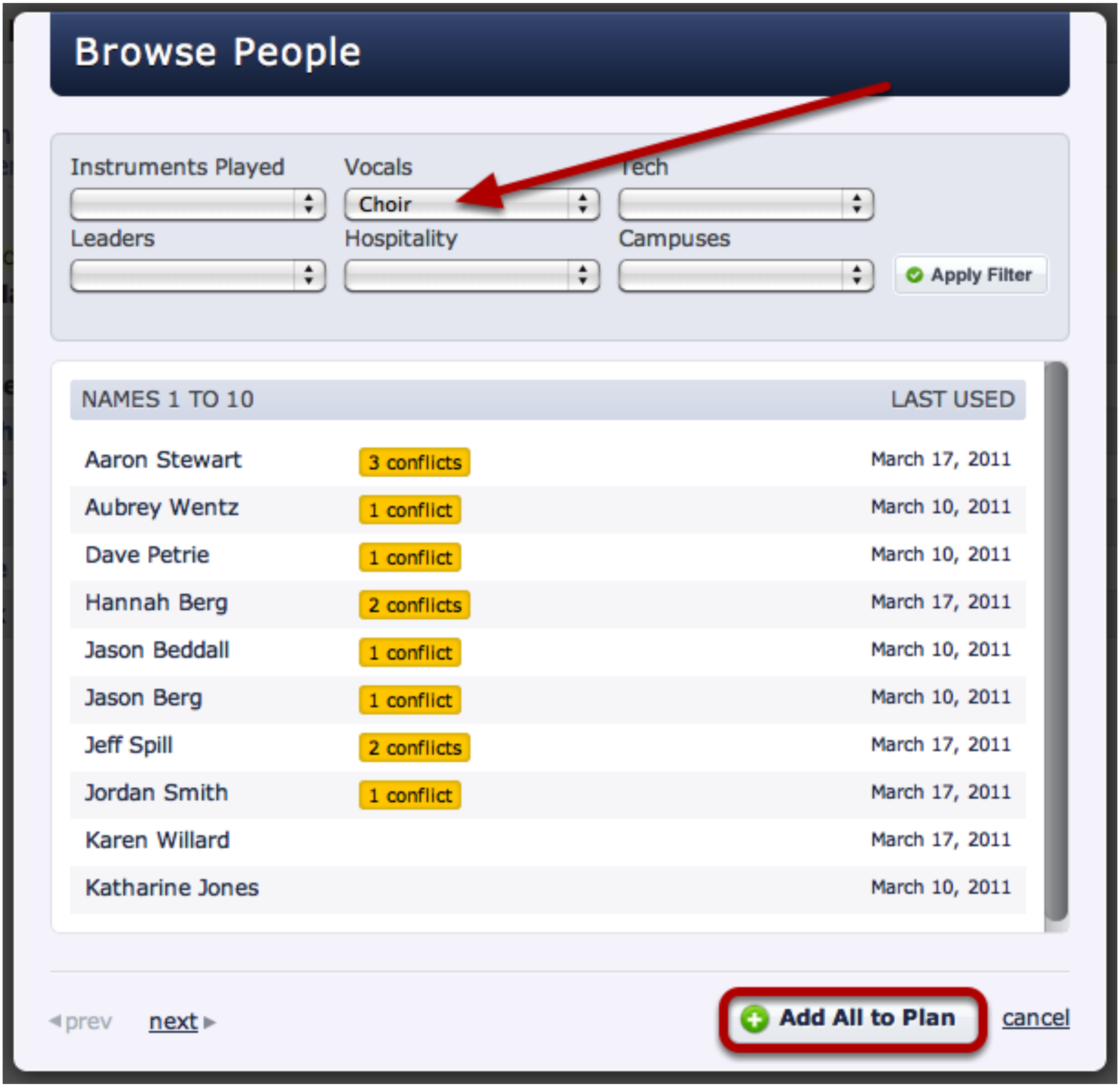


Type in the name of your group or team, then select it from the list.



If you haven't created your groups or teams, see Creating Groups or Teams for Scheduling.

Click 'add all to plan' in the bottom right corner.



This box displays all the people that have been assigned to the property "Choir". To schedule all these people at once, just click Add All to Plan.

Schedule All People for the Same Position

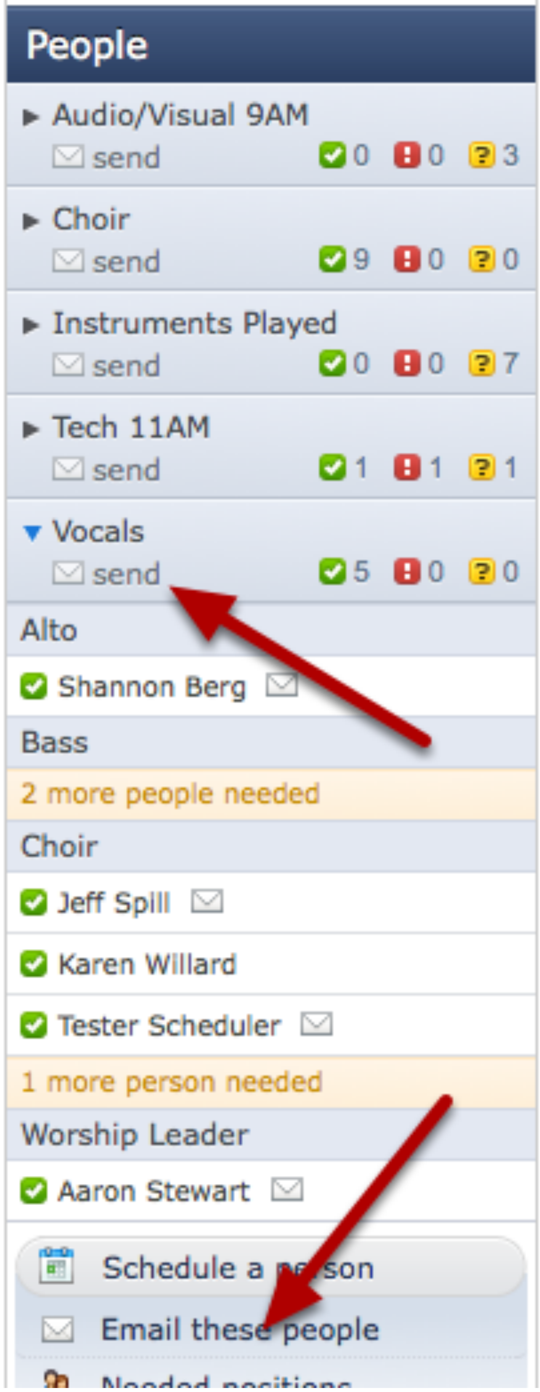
1. You can choose to schedule each person to a separate position by clicking on this button (see the next step)
2. You can schedule all of the people to the same status, category, position, and responds to person here.
3. Remove people who have a conflict or a block out date by clicking these buttons. (You can also view a user's conflict by moving your mouse over them).

When the information has been edited, click 'accept'.

Or Schedule each person for a separate position.

You can set each person's position separately by entering in their position, category, replies to person and status.

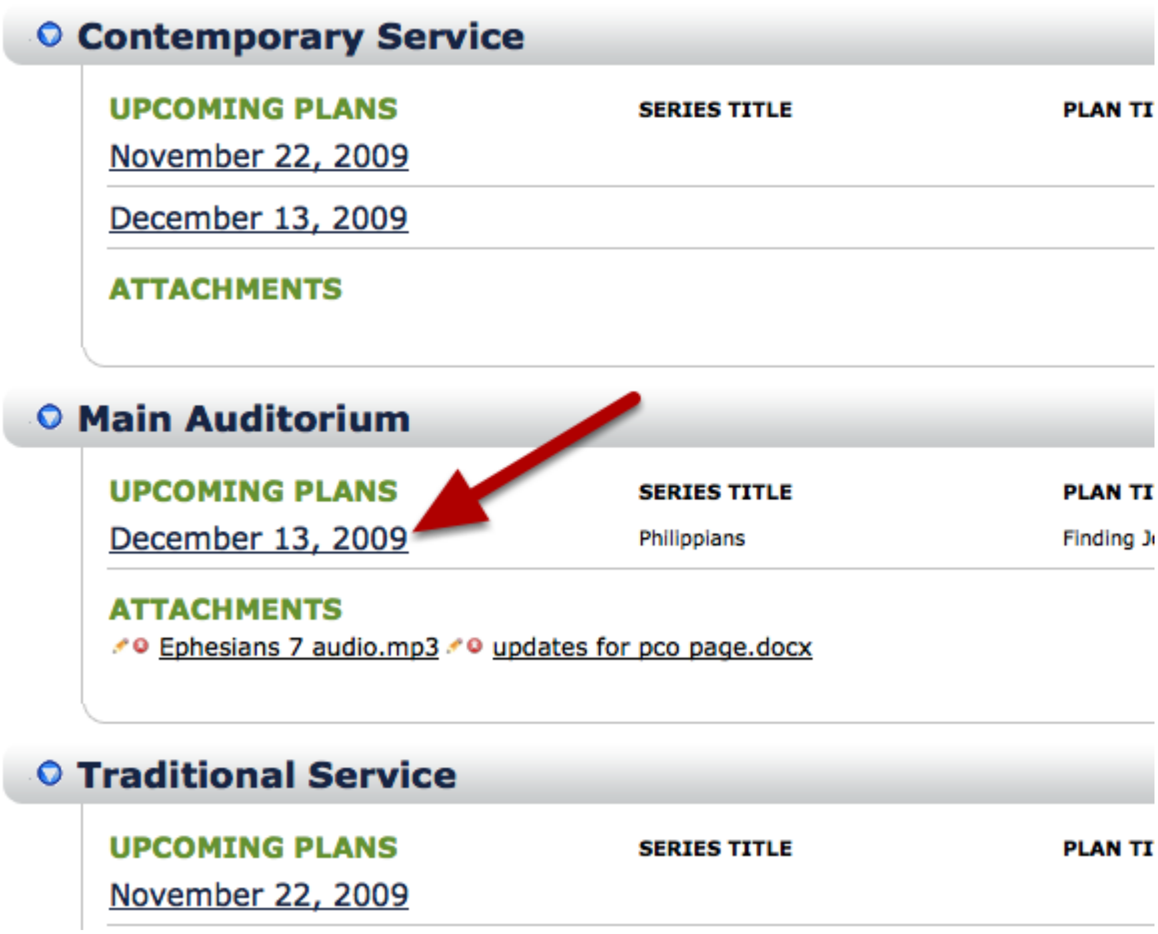
Team is scheduled in your plan.



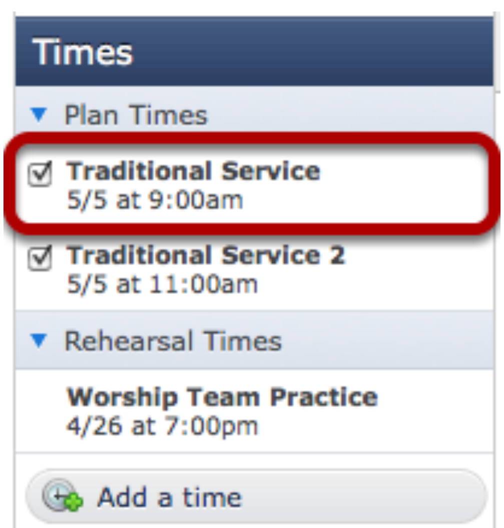
Once all of your people are scheduled, make sure you send them their notification emails. If you don't, they won't know they have been scheduled and won't be able to access the plan (unless they have a high enough permission).

Setting Up Reminder Emails

Click on the date or your plan.

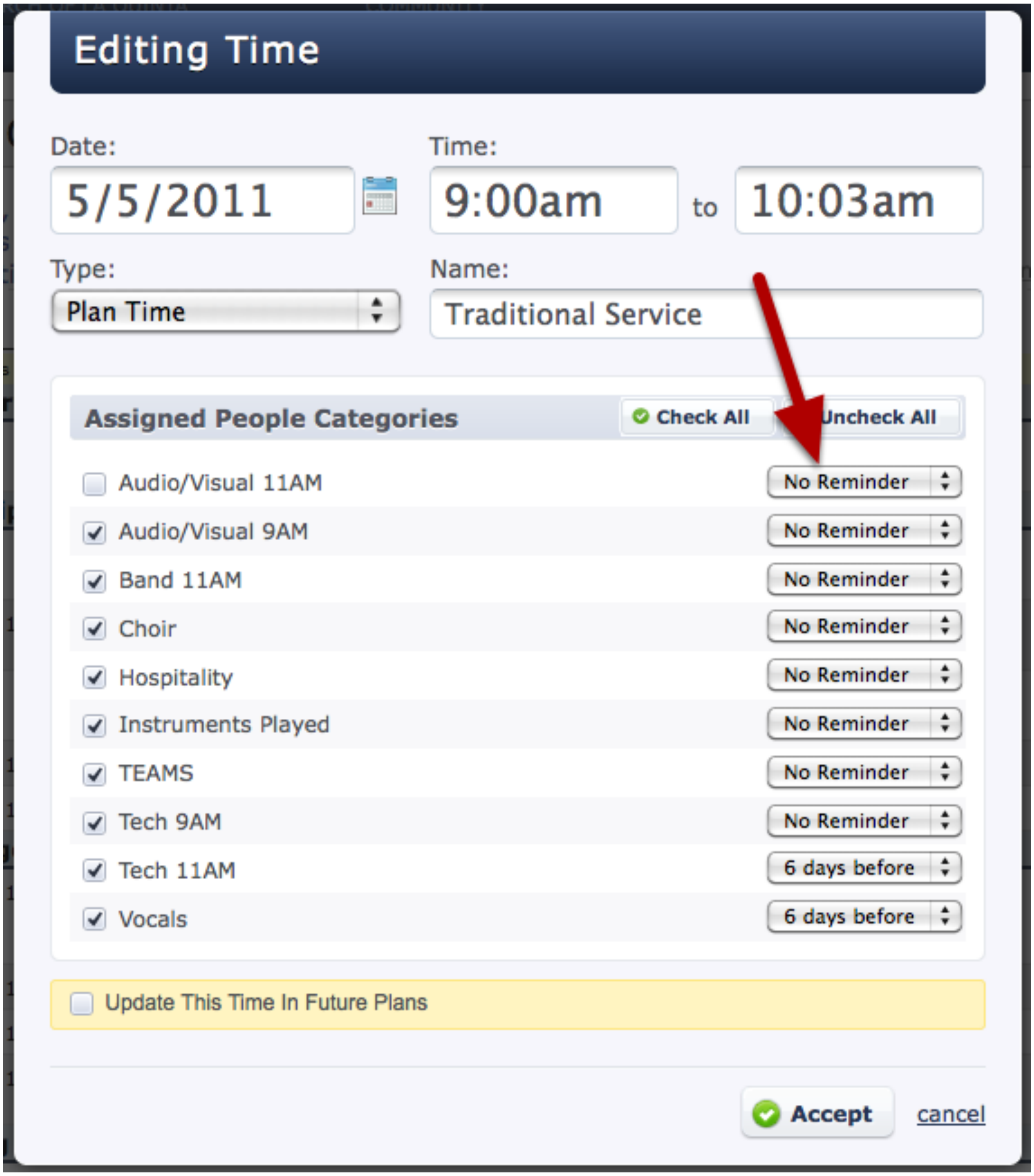


Click on a date/time.



Each time that you have entered has its own reminder settings.

Set reminders for each category.



Each people category has its own reminder. I've chosen to only send reminders to the *Tech 11AM* and Vocals categories. Just click the drop-down box (that the red arrow is pointing to) to change the day that the reminders are sent (in relation to this time). Click accept when you are done.

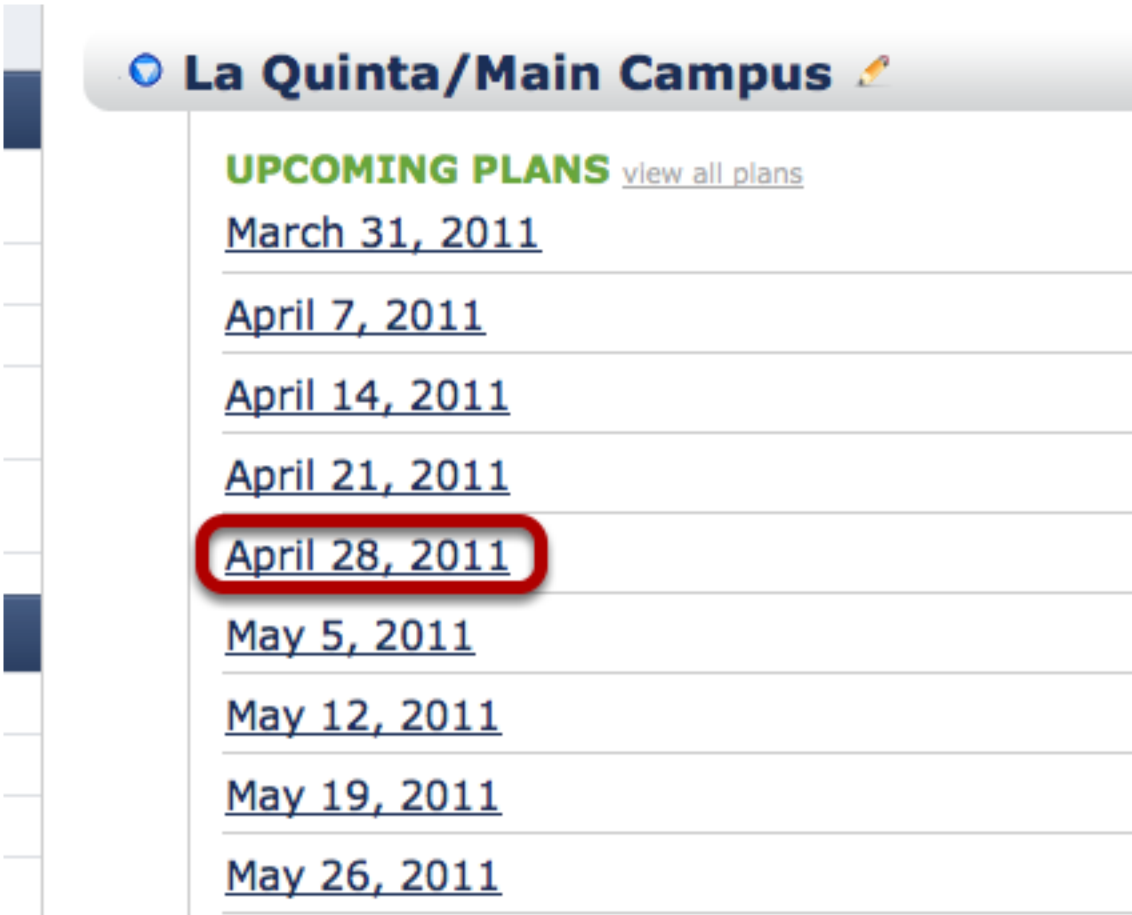
NOTE: Reminders will be sent to all unconfirmed or confirmed people scheduled in that plan. Even if the notification email has not been sent out, the reminder will still be sent.

REPEAT for any and all times that you want reminders sent out for.

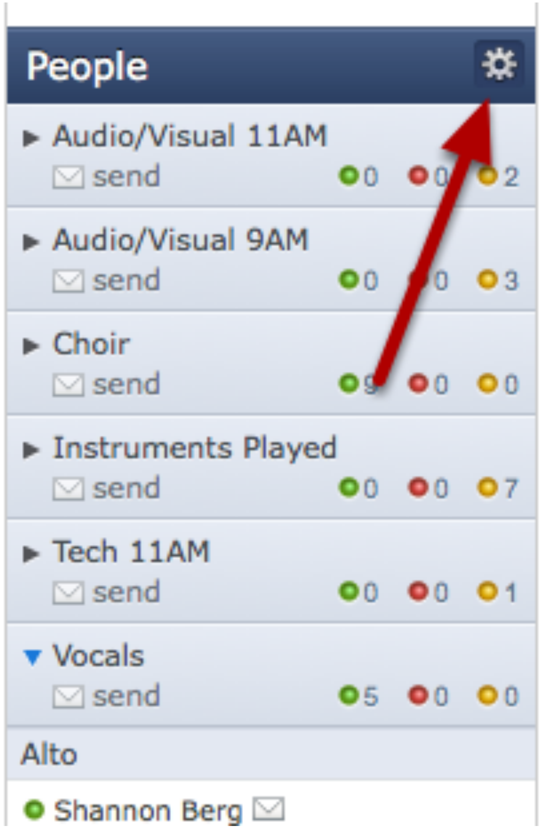
Editing People Categories

In this lesson you will learn how to edit the name of a category, set options for what scheduled viewers in this category can see, change the default status, change what responses you receive and who receives them, and set up stage layout options.

Go into a Plan



Hover your mouse over the 'People bar on the left, and click on the gear icon.



Hover over the People Category that you wish to edit and click on the pencil icon.

Editing This Category

1. **Edit Category Name**
2. **Choose to Assign People Directly to this position, or Assign Using Custom Properties**
3. **Default Status**
4. **Send Replies For-** If you are not wanting to receive responses for both accept and decline, just uncheck the box for the one you wish to not receive the responses for via email. Sometimes people will opt to only receive the declined responses, and therefore would uncheck the box next to Accept.
5. **Send Replies To-** To set the default person who will receive all responses for this category, enter their name here.
6. **Scheduled Viewer Options-** Scheduled Viewers can be set to either see the full plan, song list, or schedule only.
7. **Prepare Notification-** If you don't want people in this category to default to having an email

notification prepared, uncheck this. Generally you will leave it checked.

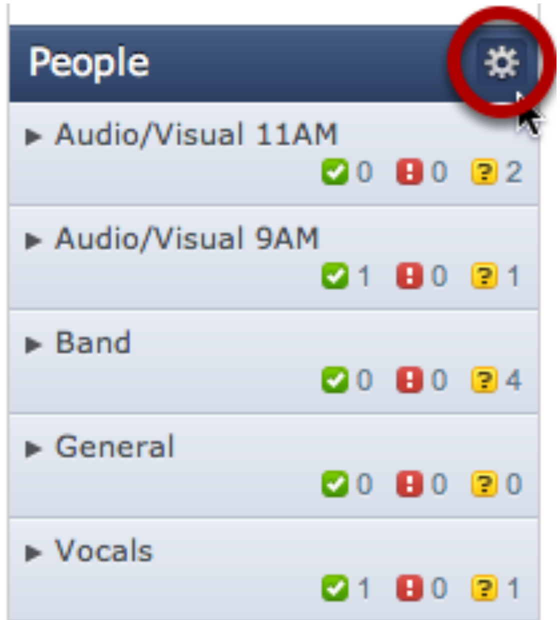
8. **Stage Layout Options-** If you want this category to be included in your stage layout, you'll need to indicate either Initials or Name for the first box, and then the color for the second box.

When finished click accept.

Reordering People Categories

You can easily change the order of your people categories to put them in an order that works for you. (The positions in your categories cannot be reordered.)

Click the gear to edit your People Categories



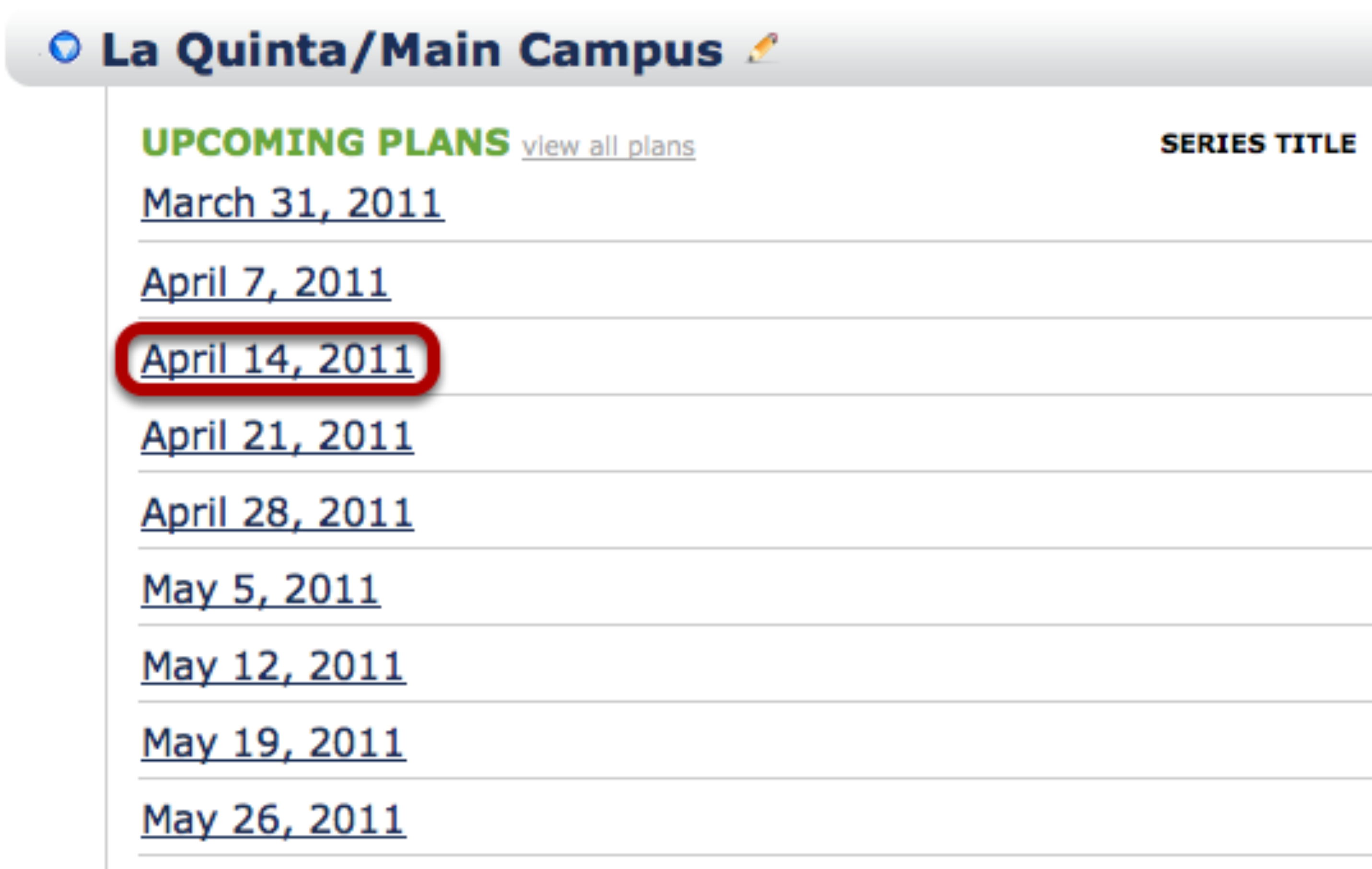
You can do this from any plan and it will edit your category settings for all plans in that service type.

Drag the left handles to reorder your categories

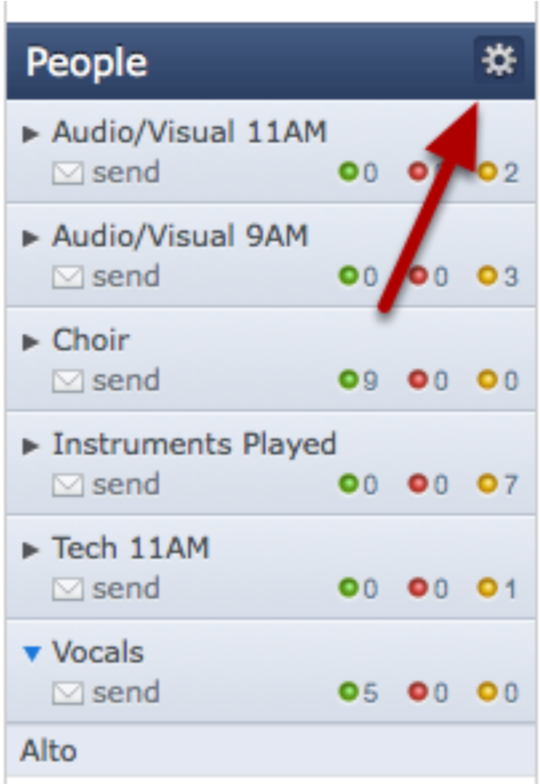
Setting Up Positions

Setting up Positions and assigning people to them will simplify your scheduling. See all of the people assigned to your Piano position, for example, and if one of them declines, you will get an email listing all of your other Piano players.

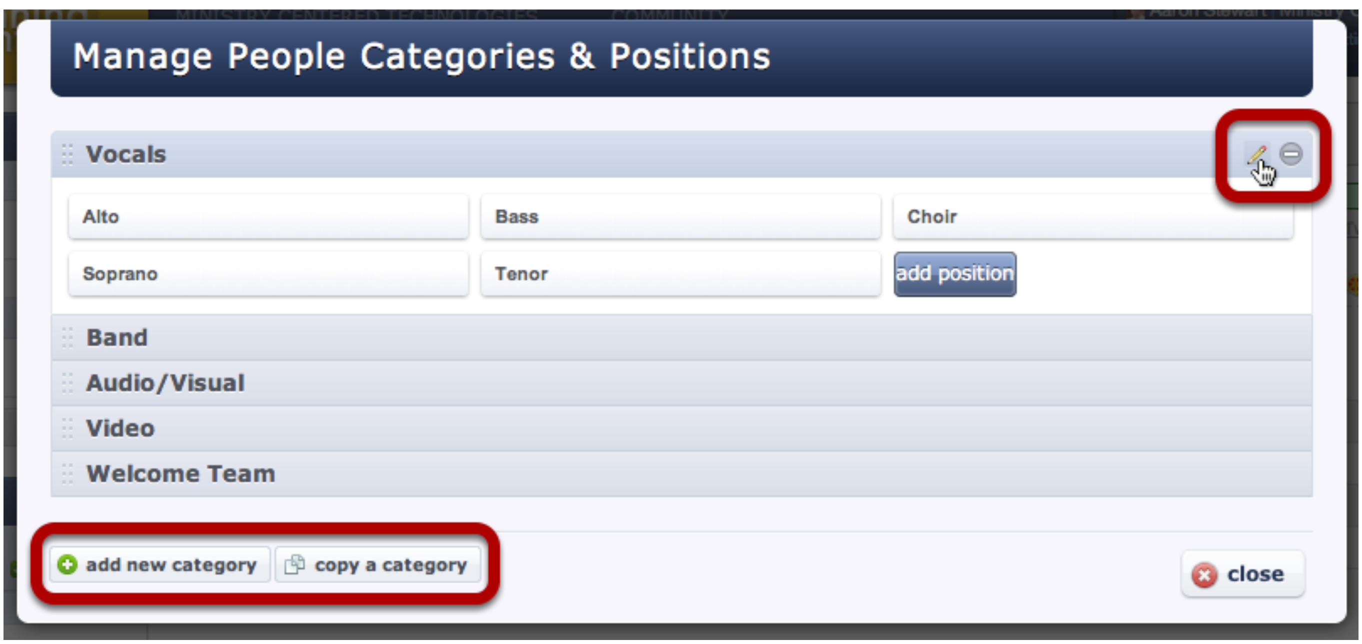
Click on a plan



Then click on the gear icon that appears when you hover over 'People'

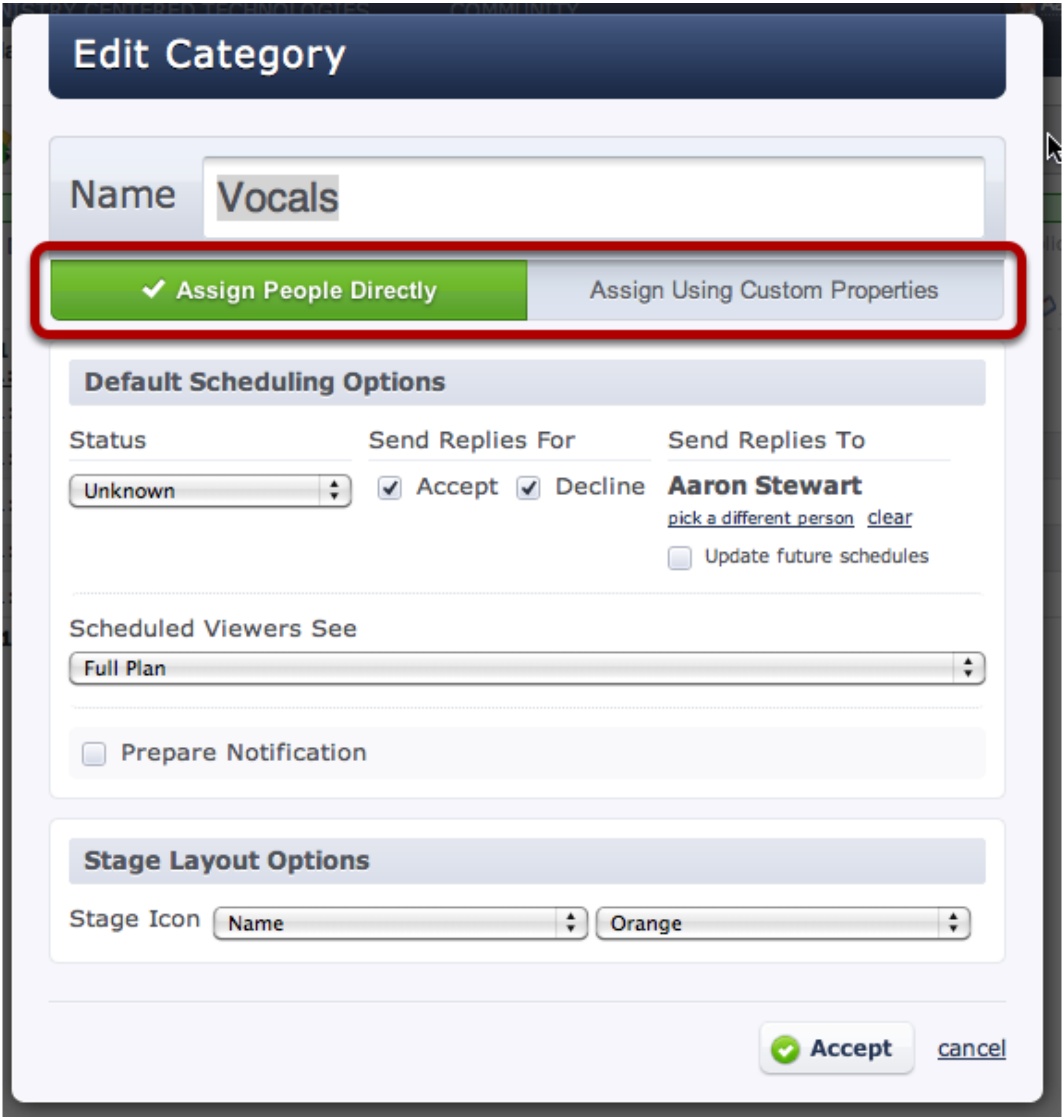


Add or Edit a Category



To edit a Category, hover over it and click the pencil that appears to the right.
To add a category, or copy a category with all its positions, click one of the buttons on the bottom left.

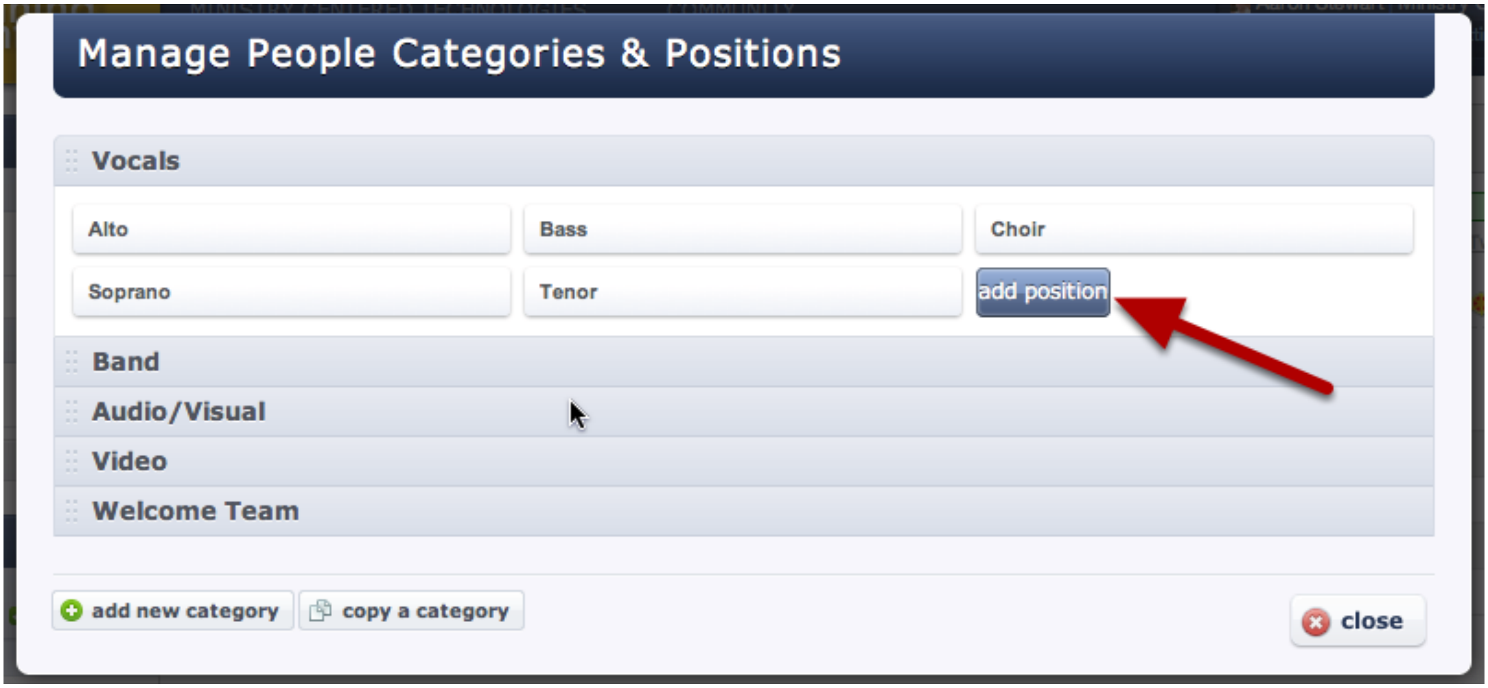
Choose how to Assign Positions for this Category



For each Category, there are 2 options for how to assign people to its positions. We usually recommend keeping the default "Assign People Directly". The option you choose will determine the following steps. To learn the difference between these methods, read this article.

To learn about the other options in this box, read our article on Editing People Categories. Once you are done, click accept.

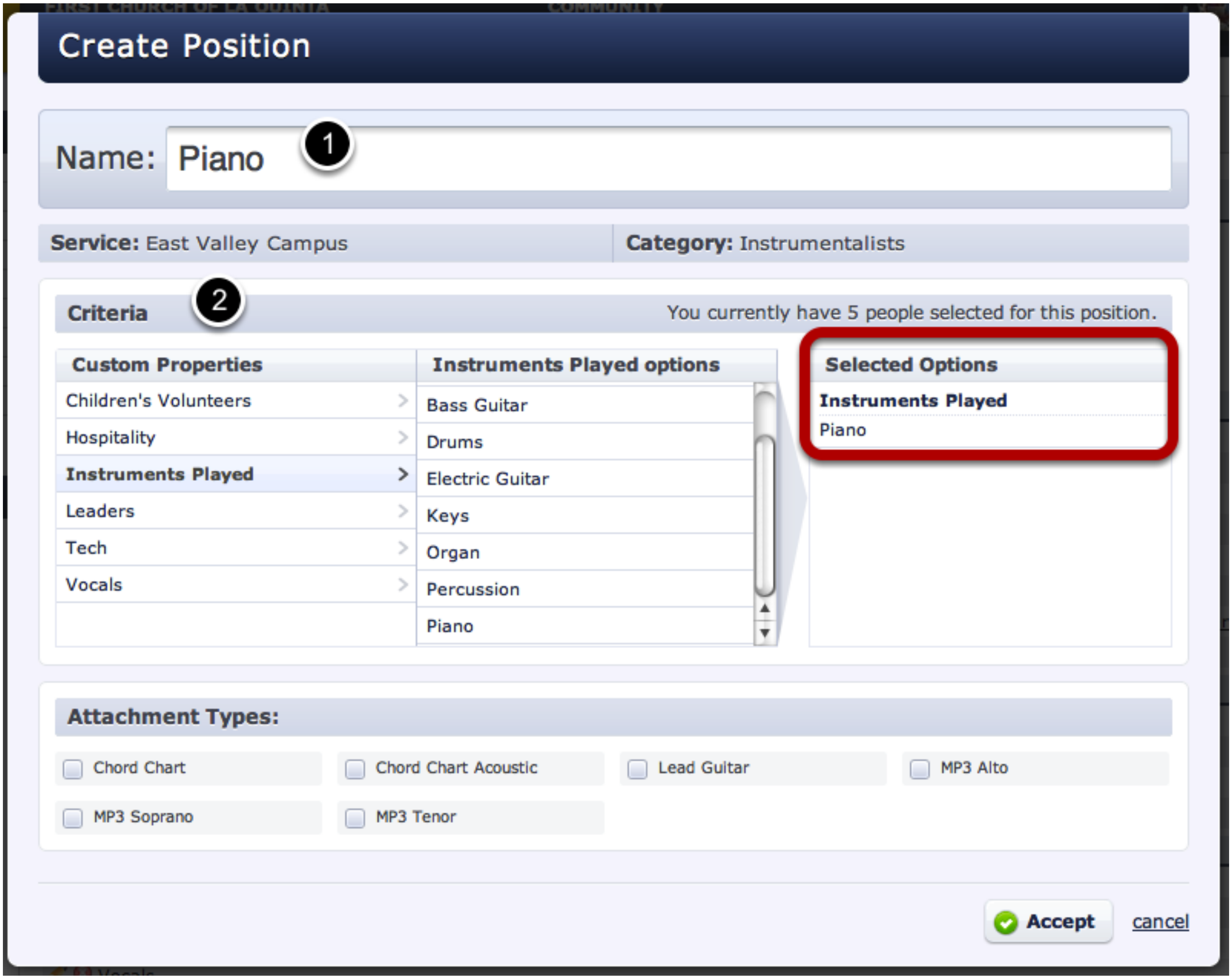
Add positions to your category by clicking on the 'add position' button



Assigning People Directly to your Positions (option 1)

If you chose the option to "Assign People Directly" to your Category using the green toggle above, you can assign people directly by typing their name here. You can also type the name of another position or any custom properties to import all of those people at once.

Assigning using Custom Properties (option 2)



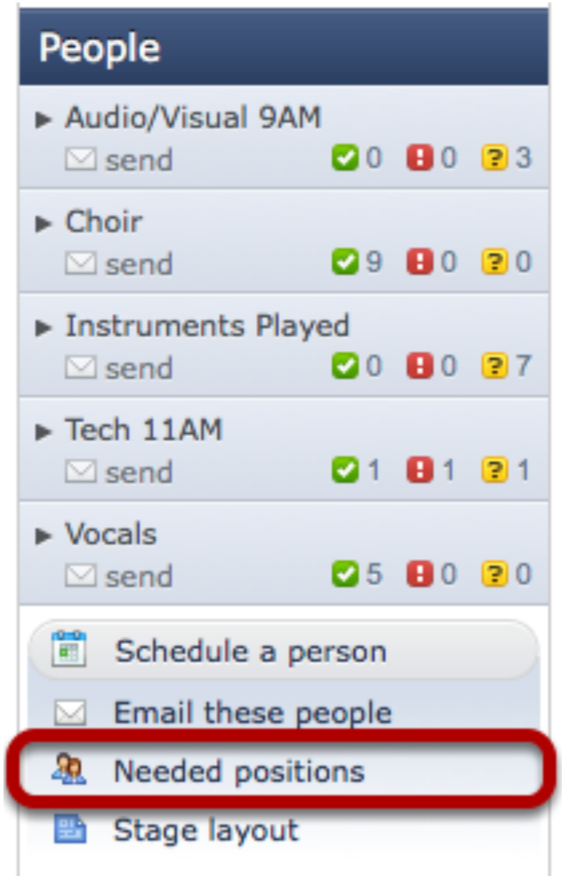
If you chose the option to "Assign People Using Custom Properties" to your Category using the green toggle above, this is where you link this position with your Custom Properties. Any people assigned to the Selected Options will be assigned to this position. In this case, I have the Piano position pulling from the custom property Instruments Played > Piano. It shows I have 5 people selected for this position, which means there are 5 people in the system with the Piano custom property.

Needed Positions and Custom Properties are explained in other lessons.

Setting Up or Editing Needed Positions

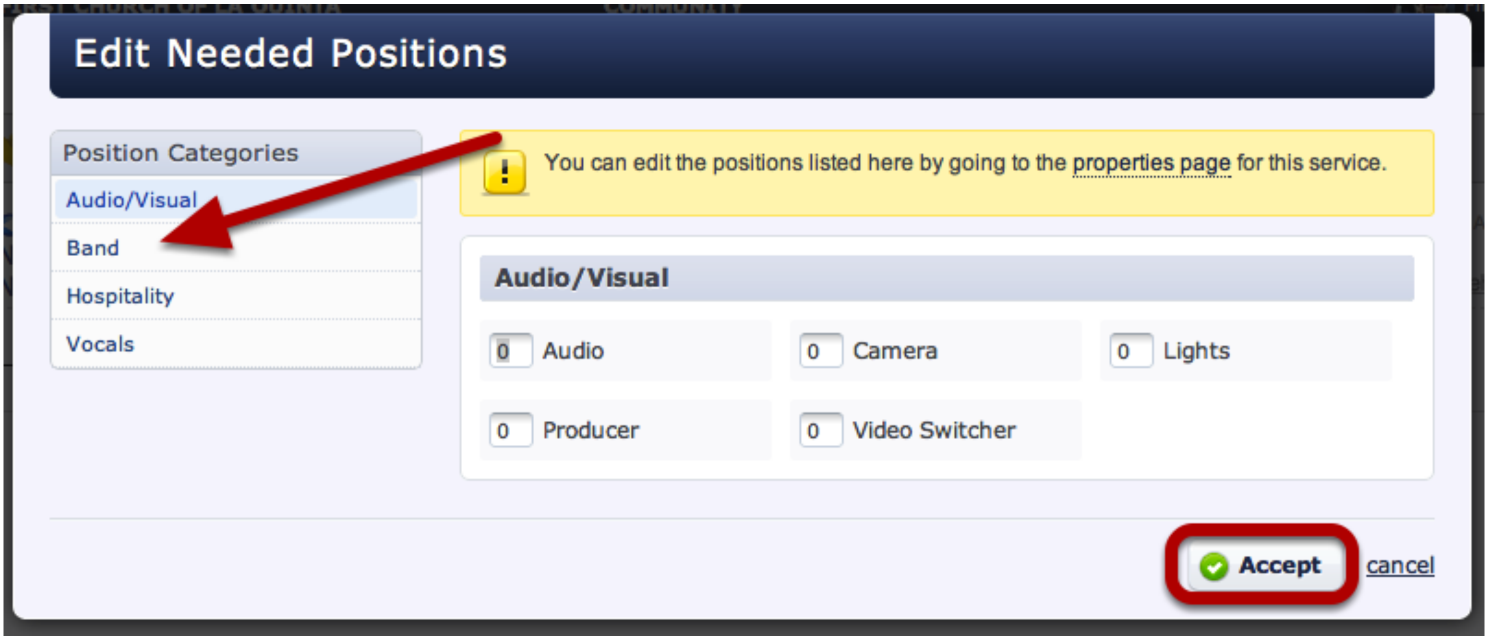
Setup Needed Positions when you don't know *who* you want to schedule, but you know you will need a certain number of people to fill a position. Add Needed Positions to templates when you will need the same number of people each week to greatly simplify your scheduling.

Click 'needed positions'



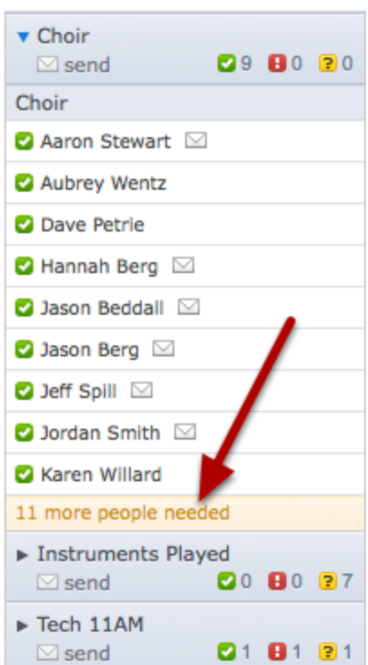
From inside any plan, click the 'needed positions' button at the bottom of the People section on the left side of the page.

Edit needed positions



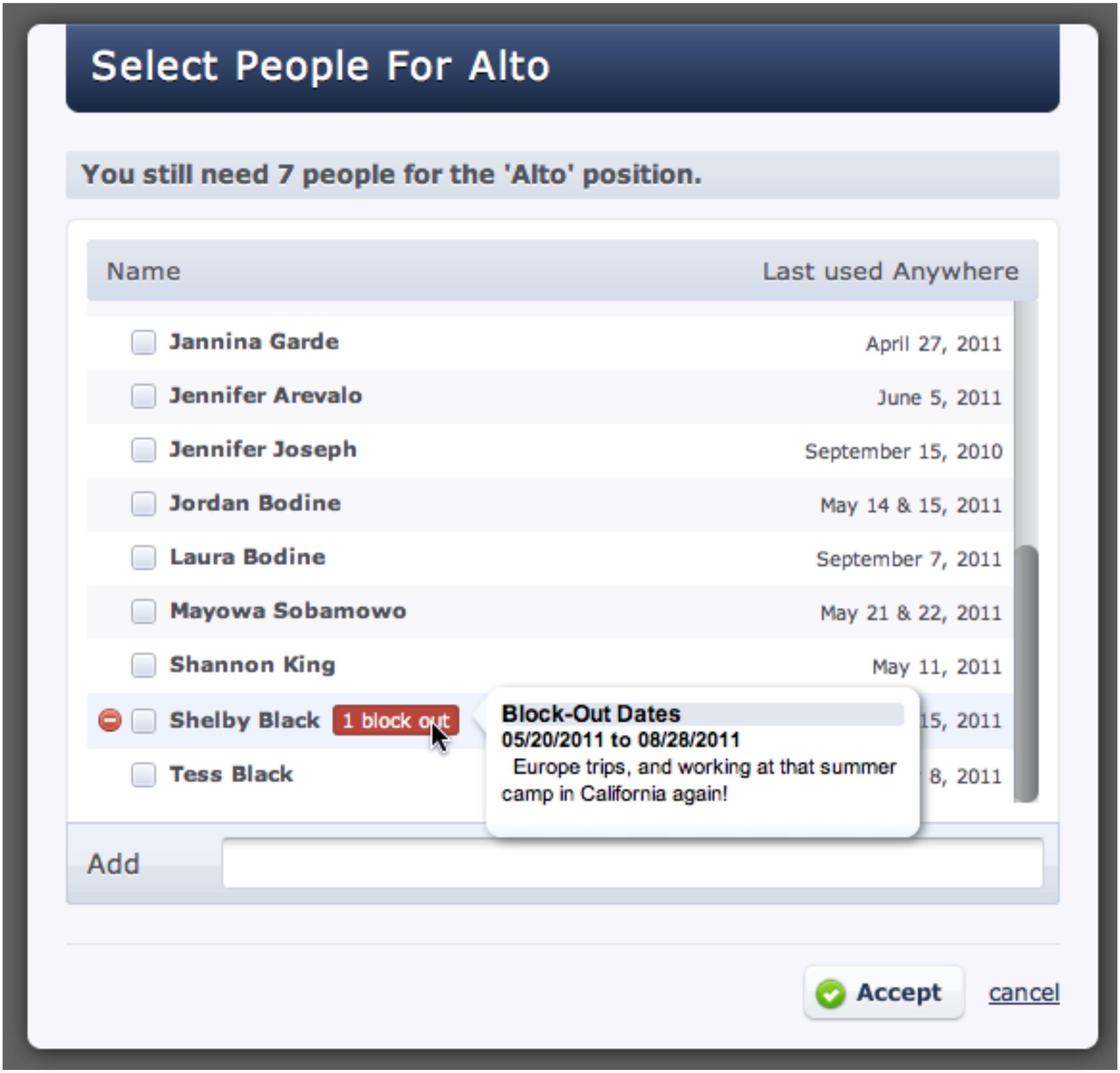
First select the category you want on the left, then indicate the number of people you will need for each position shown. Only categories that have at least one position will show in this window. If you need to edit them or add more, click the link in the yellow box at the top of this dialog box. When finished, click 'accept'.

Schedule your people



Using needed positions makes your scheduling easier. Just click on the '_ more people needed' link.

Select someone



These are the people you have assigned to your position. If any of your people have conflicts, it will show you how many conflicts. Hold your mouse over the conflict to see exactly what that conflict is. You can still schedule people that have a conflict, but it will warn you first. Select the people/person you want, then click accept and they are scheduled.

(If you Assign People Directly to positions, you will also be able to add new people to this position using the Add bar at the bottom, or remove people from this position by hovering over them and clicking the red minus button. If you setup your Categories using Custom Properties instead, you will not be able to do this.)

You can setup Needed Positions in your templates so that they are automatically added to new plans.

Item Note Categories

This lesson will show you how to create and edit Item Note Categories.

Click on the pencil icon of an item

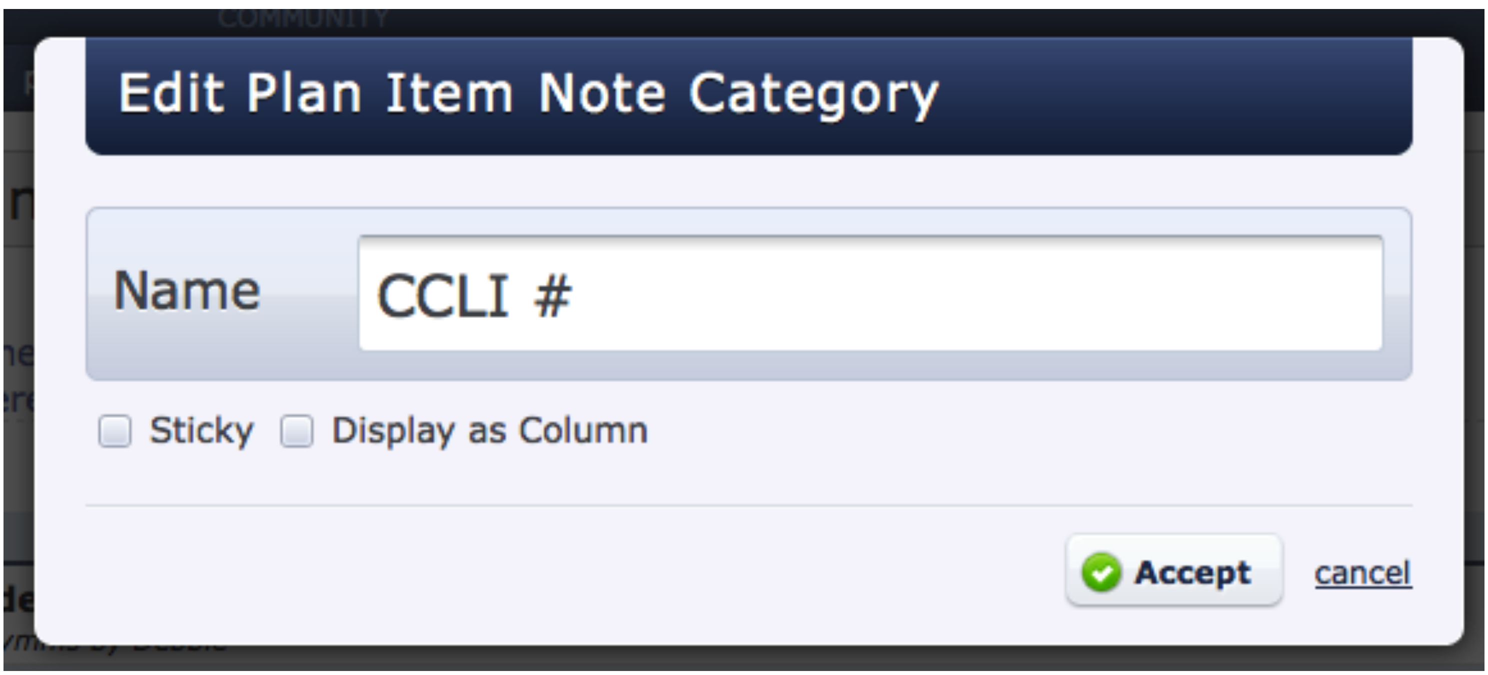
If you have existing note categories, notes that are set to "Sticky" will always be visable

To select your other note categories for this item, click on the 'add another note' button (1), and then select your note category (2)

To edit your Item Notes Categories, click on the gear icon.

To add a new category, click on the add new category button.
To delete a category, click on the red '-' icon.
To edit a category, click on the pencil icon.

Editing an existing note category



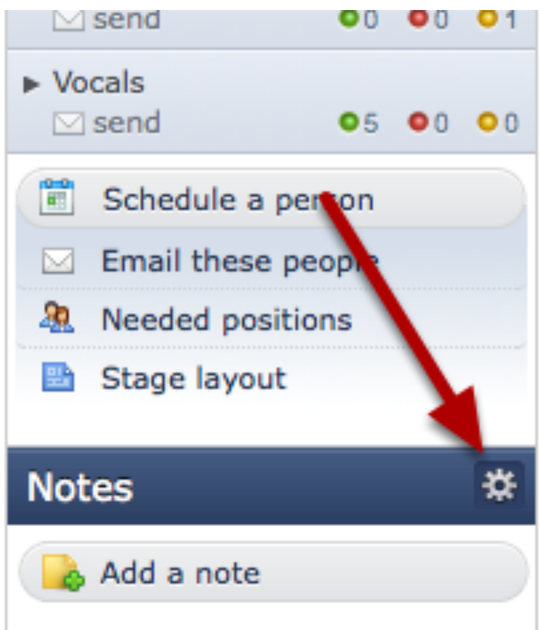
If you click on the pencil icon or the 'add a new category' button, you will be able to enter the name of the category, and wether it is a 'Sticky' note category, or if it appears in a column in your plan.

Adding or Editing Plan Notes & Categories

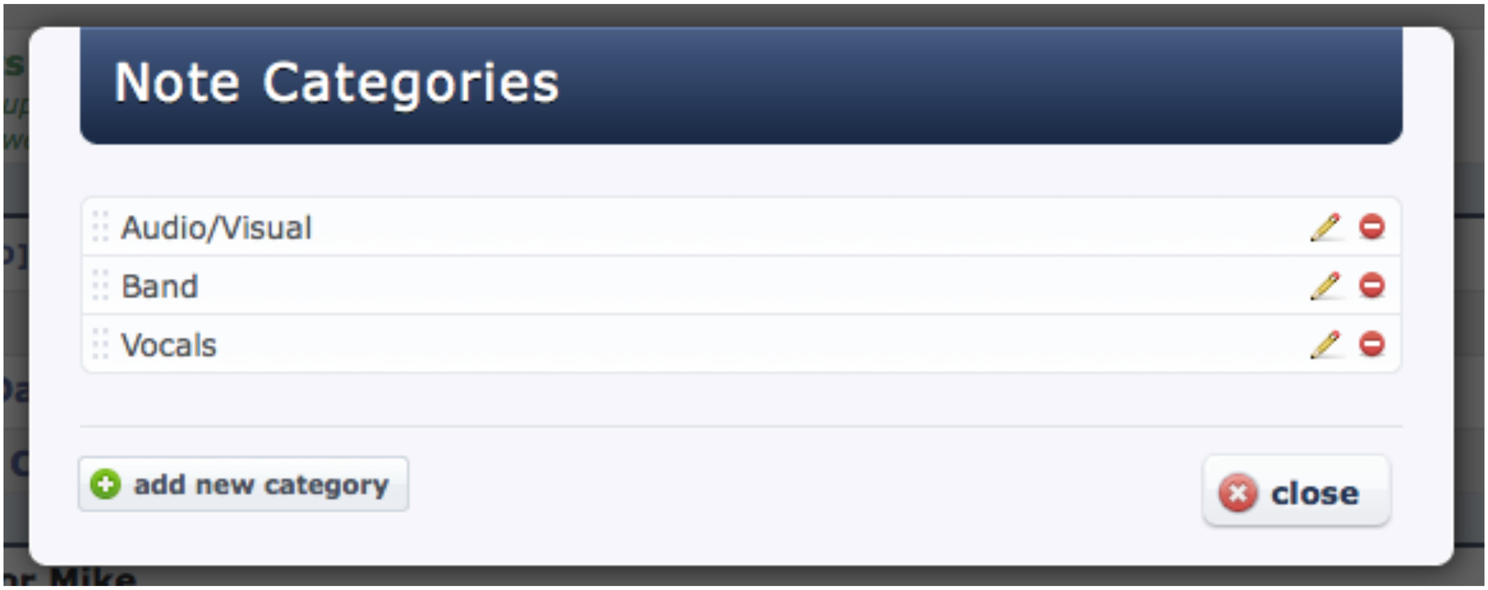
Plan notes are notes that pertain to the whole plan and not just an indivisual item. Plan notes also show up as their own rows in the Matrix. Learn how to add, edit and delete plan notes.

Click on a plan

Hover your mouse over 'Notes' and click on the gear icon

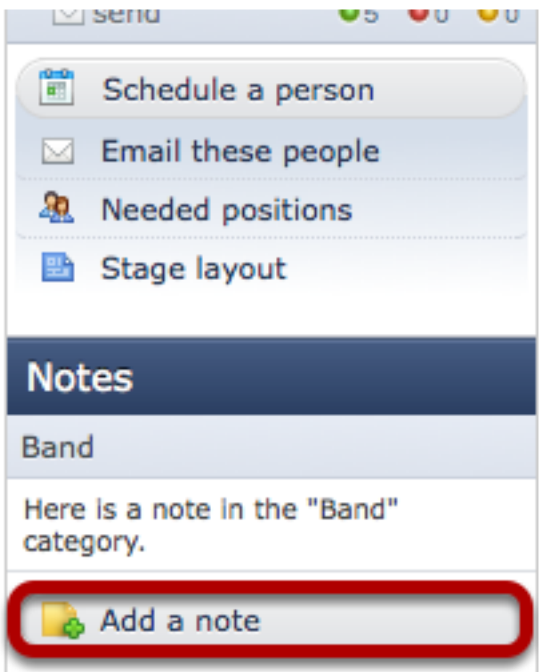


Editing your note categories

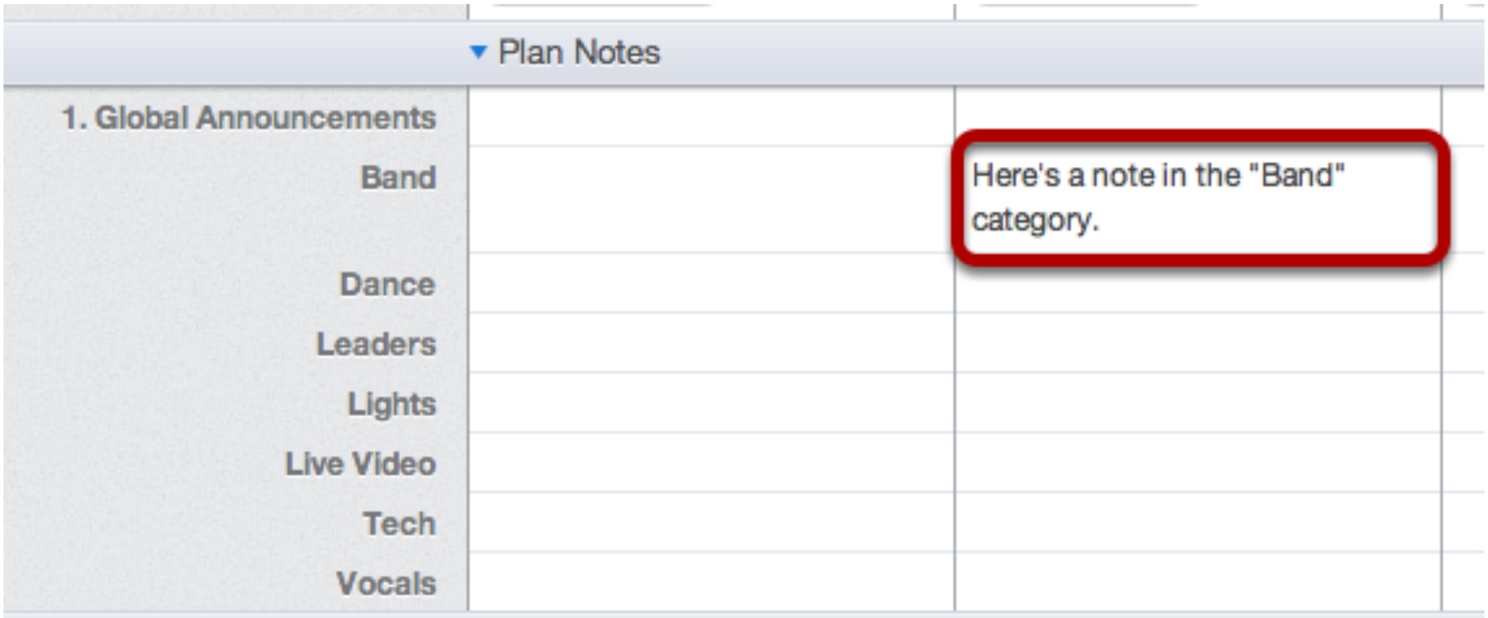


Click on the pencil icon to edit an existing note category, the red '-' to delete it, or click on the left of it to arrange it.
To add a new category, click on the 'add new category button'.

To add a note, click on the 'Add a note' button.



Adding a note in Matrix View

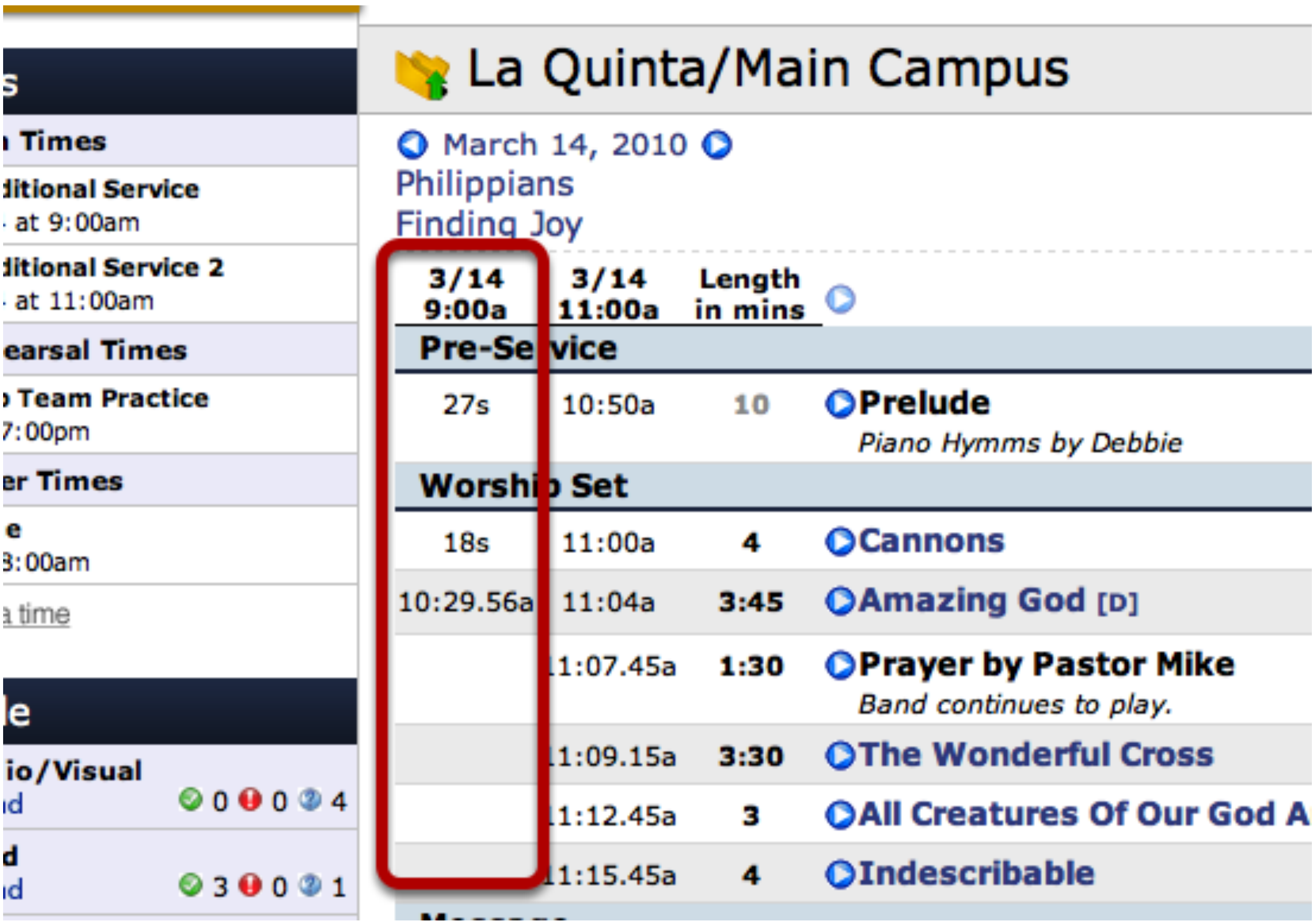


In the Matrix, click the plan notes heading to make sure it is opened, and then just click any cell to edit the plan note. To save your note, hit enter. To add an extra line in a plan note, hold down Shift and hit enter. To learn how to get to the Matrix, see this lession.

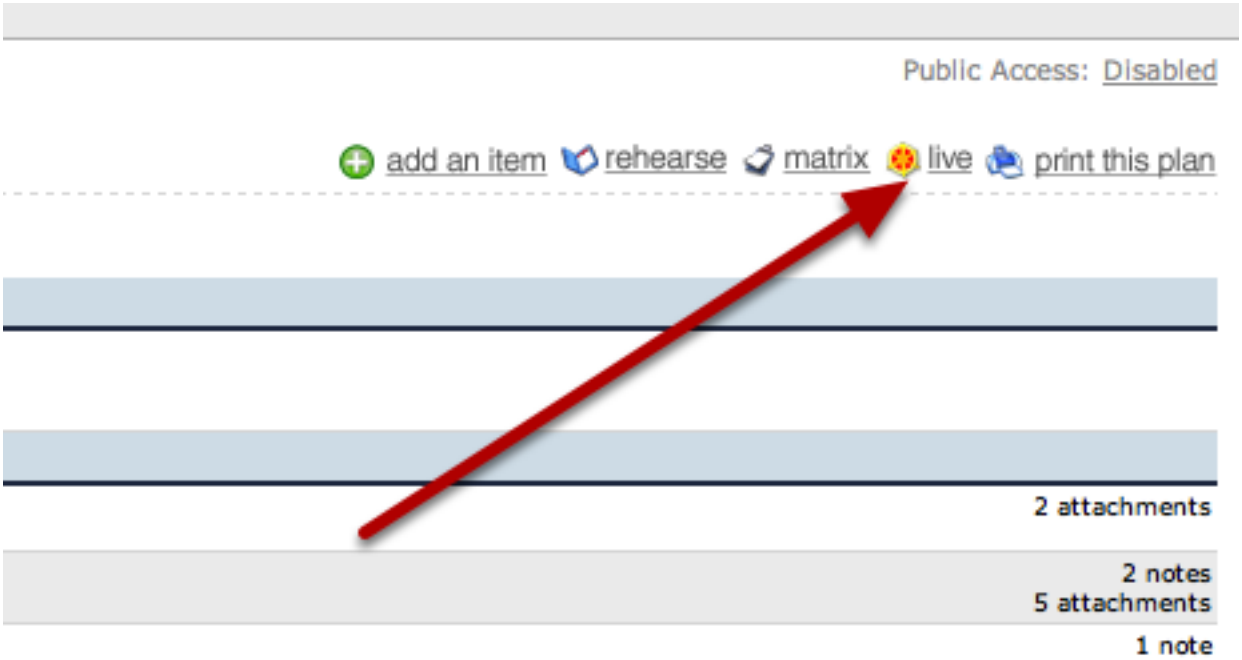
Resetting LIVE times

This lesson shows you how to go back and reset any Live times in a plan.

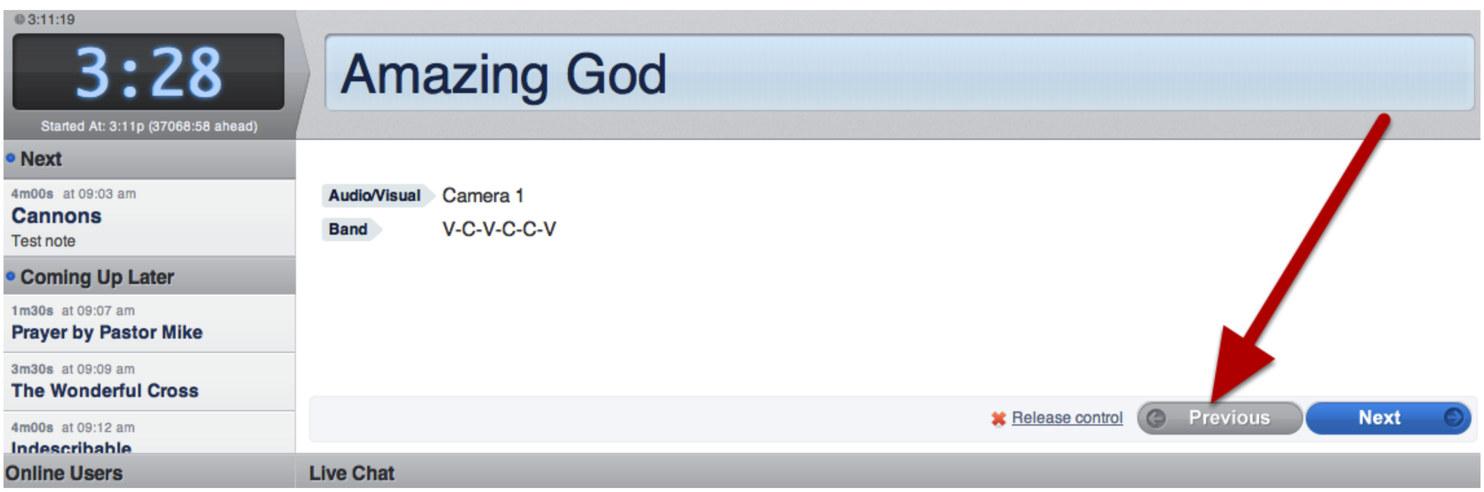
If you or someone else went into Live and clicked through, your plan may look like this:



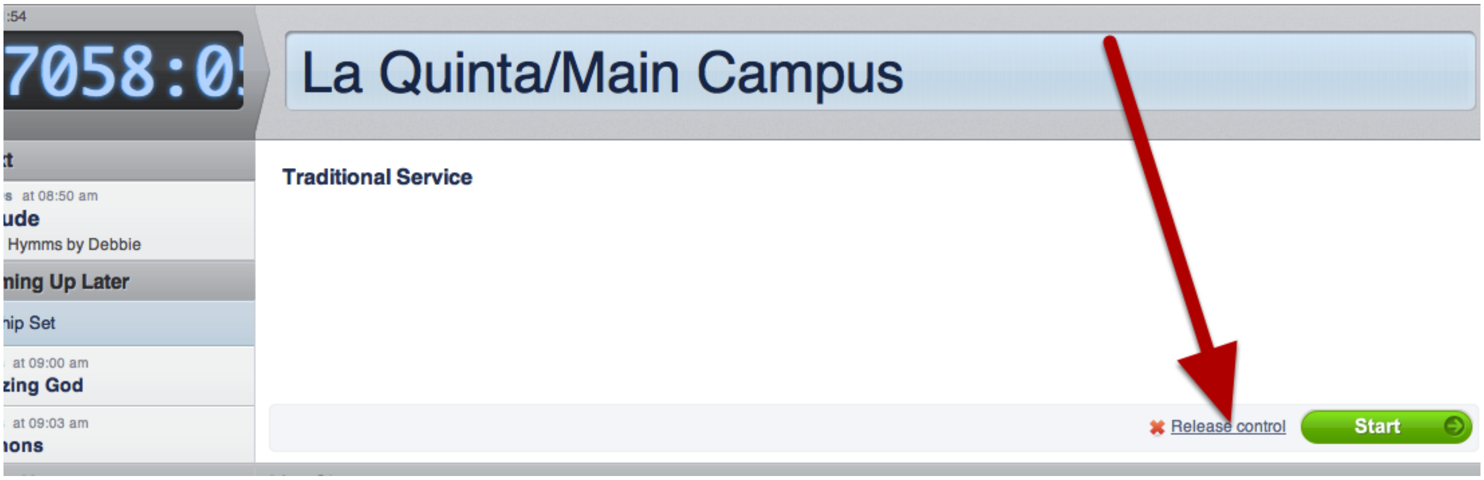
To reset this, click Live in that plan.



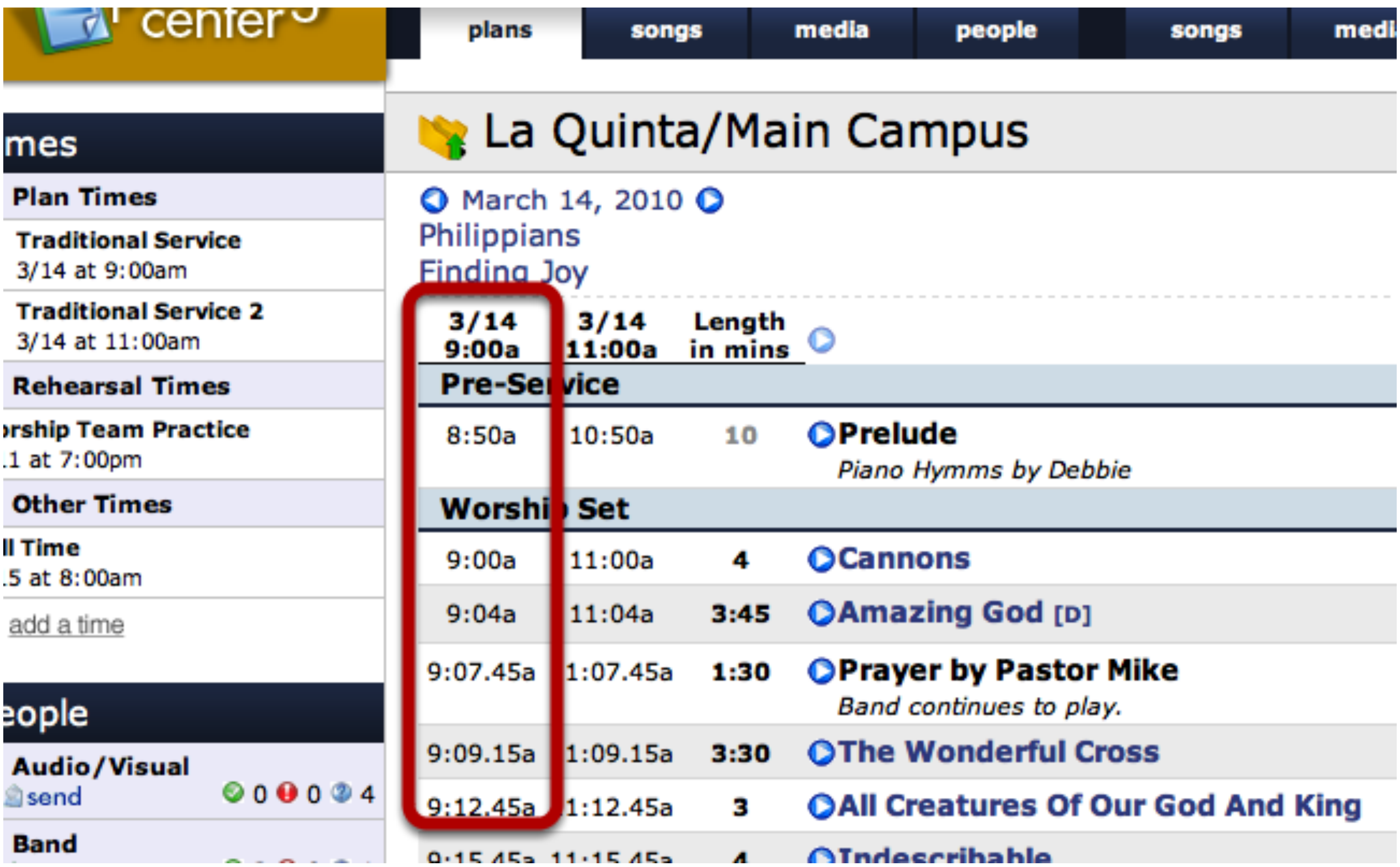
Click Previous until you are back to the beginning of your plan.



Once you're back to the beginning, click Release Control, then exit out of this screen.



Your times are reset!



Streaming and Downloading Songs in a Plan.

This lesson shows users how to stream songs when they are looking at a plan. It also covers how to dowlnoad a song in a plan.

Click on 'Rehearse', then 'Media Player' to stream all mp3s connected with that plan.

Media Player will pop up and begin playing.

There are many different options on the Media Player.

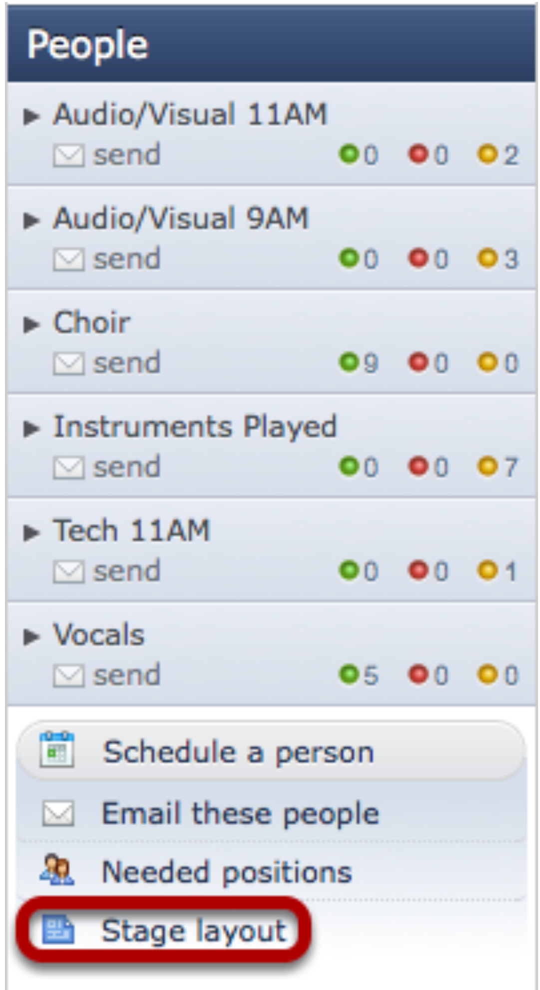
1: Pause the current song that is playing.
2: Adjust the volume (to the left) or turn on or off the LOOP function (to the right).
3: PAN the audio.
4: Pop-Out this Media Player so you can have it playing outside of PCO.
5: Close the Media Player.

To Download MP3s:

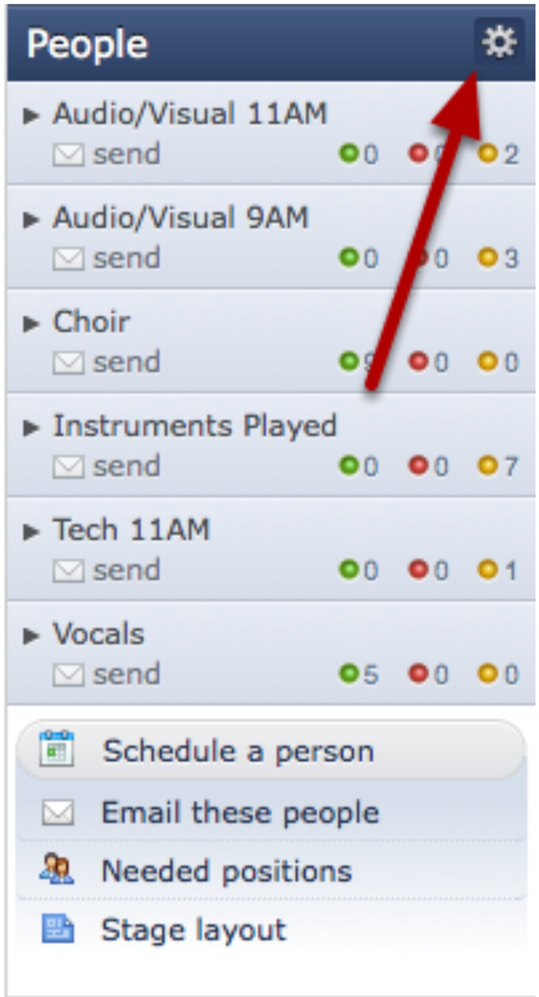
If the administrator on your account has set an mp3 to allow download, you will be able to expand the song then click on the mp3, as highlighted above in the red box. There is no need to right click- just clicking on it should allow you to download. If you are not able to do that, it most likely means the administrator has set it up to where that mp3 cannot be downloaded.

Using the Stage Layout feature

Stage Layout feature is found in each Plan.

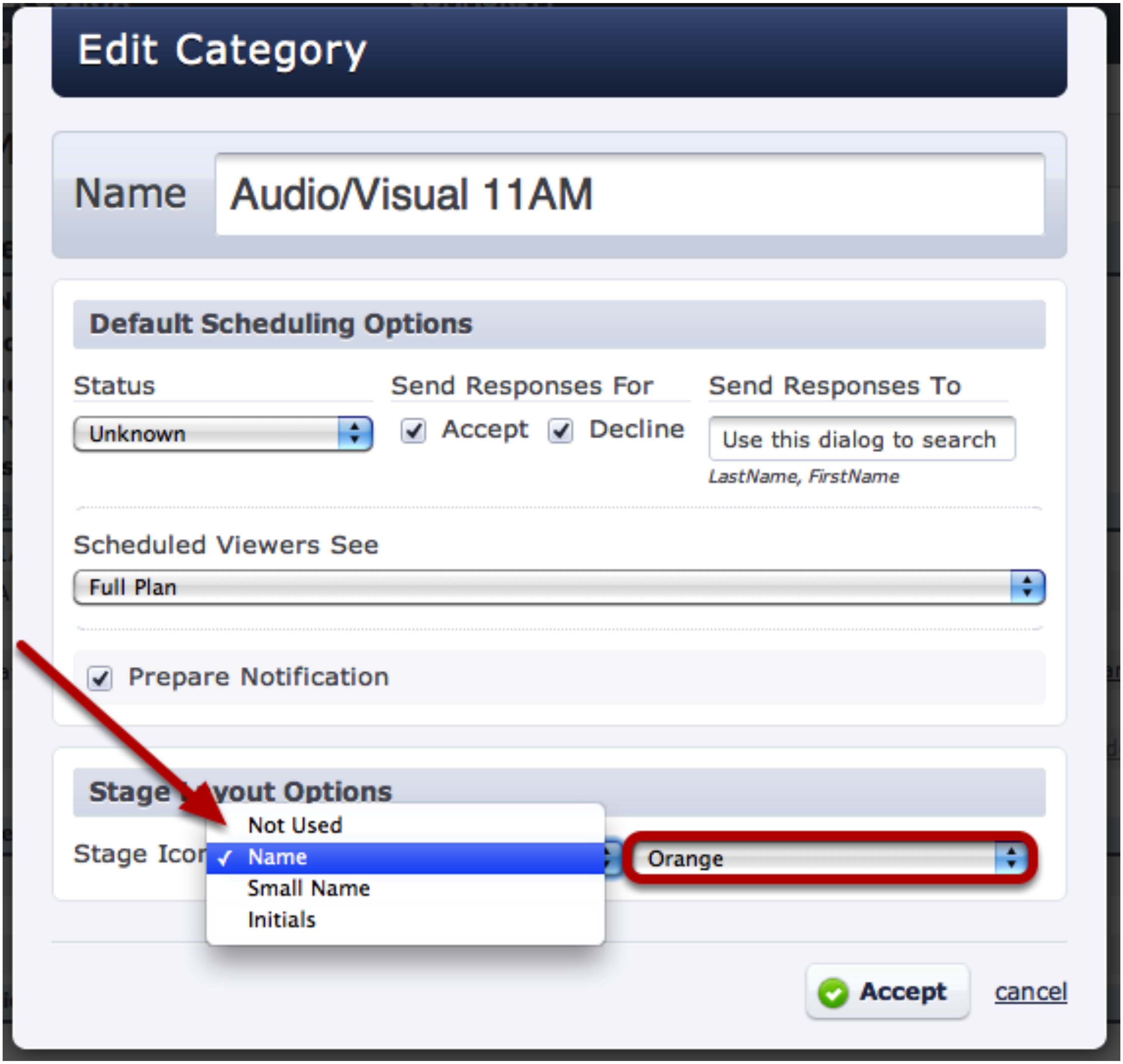


First, set up categories by clicking on the gear icon that appears when you hover over 'People'



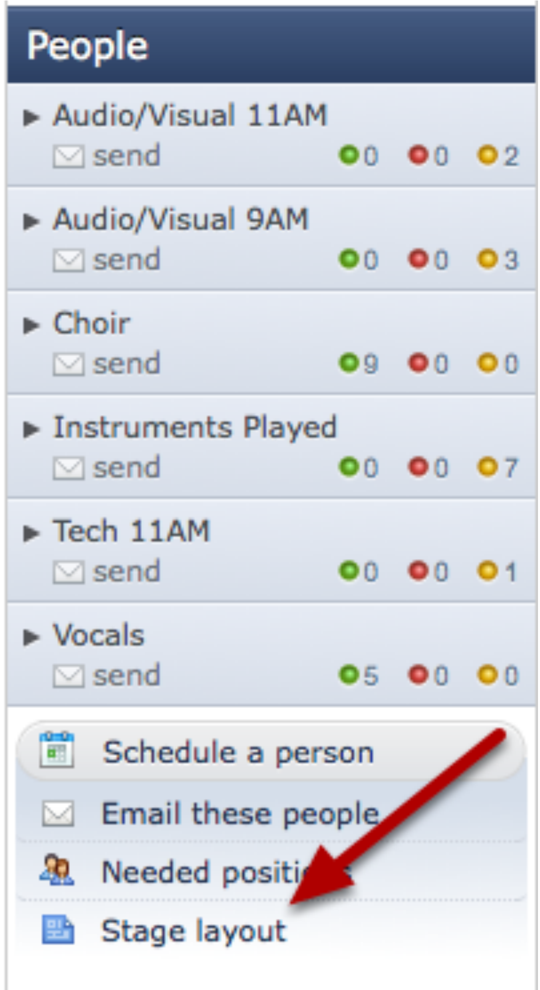
Click the pencil next to each category.

Set stage layout options.



For this category, you will need to choose what color the icons will be and if you just want initials to show up or names. After you've made your selections, click Accept. Then continue and do this for any and all categories you want included on the stage layout.

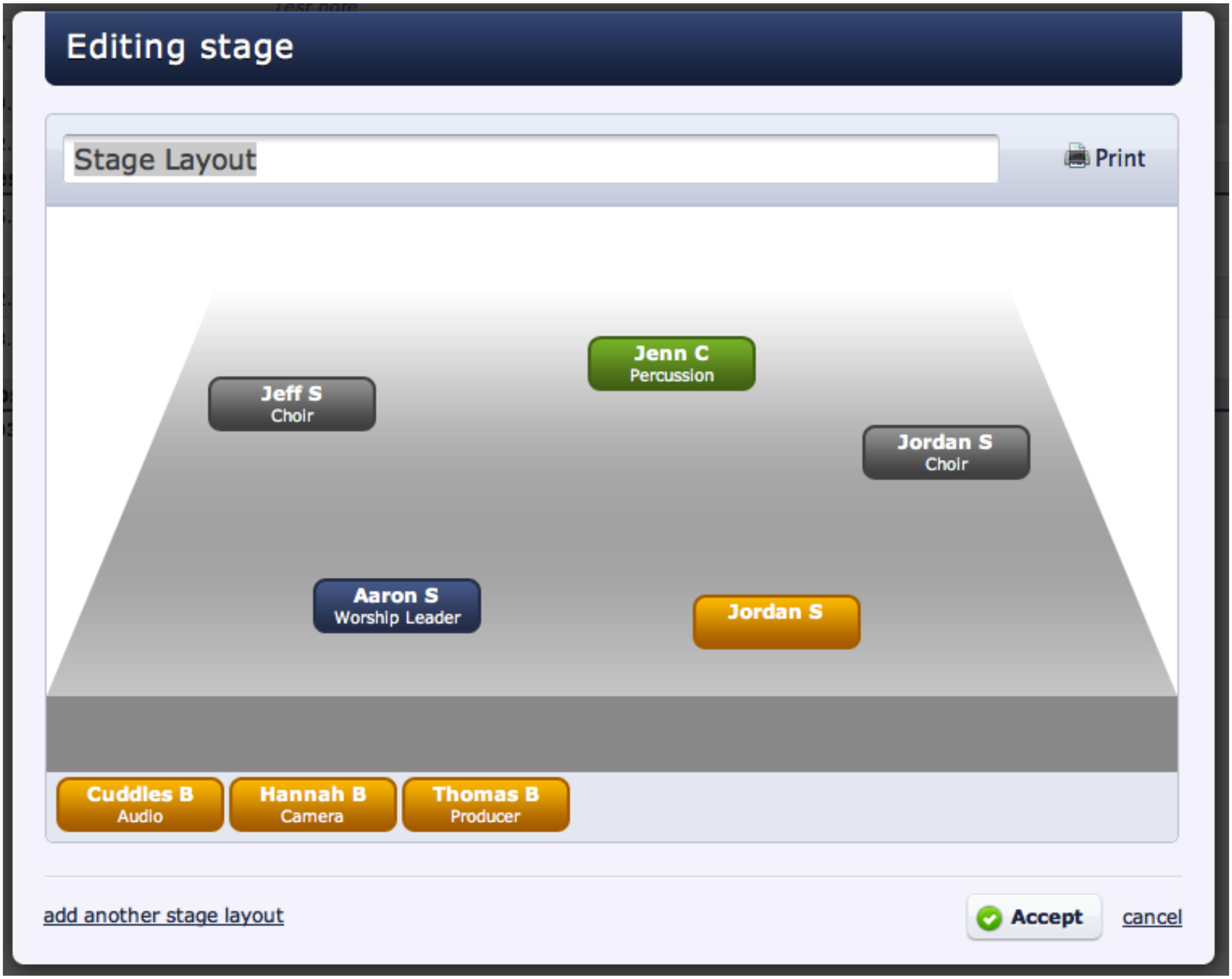
Click on 'Stage Layout'



Choose which stage layout you'd like.

The two on the bottom are ones I had already added. Click on the one you want and it will automatically take you to the next step.

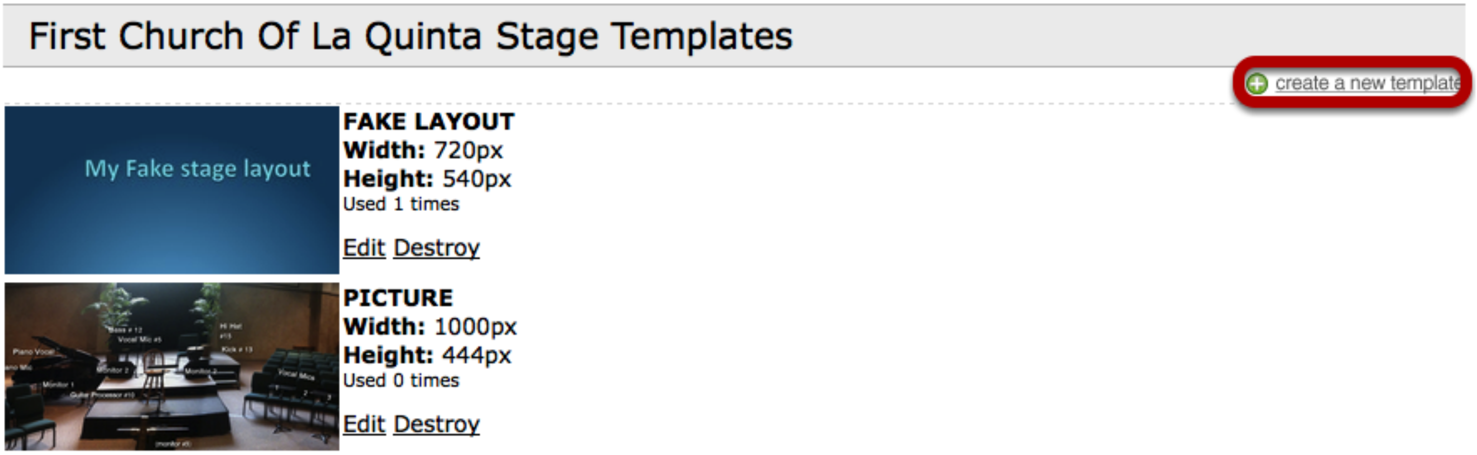
Begin dragging and dropping your people.



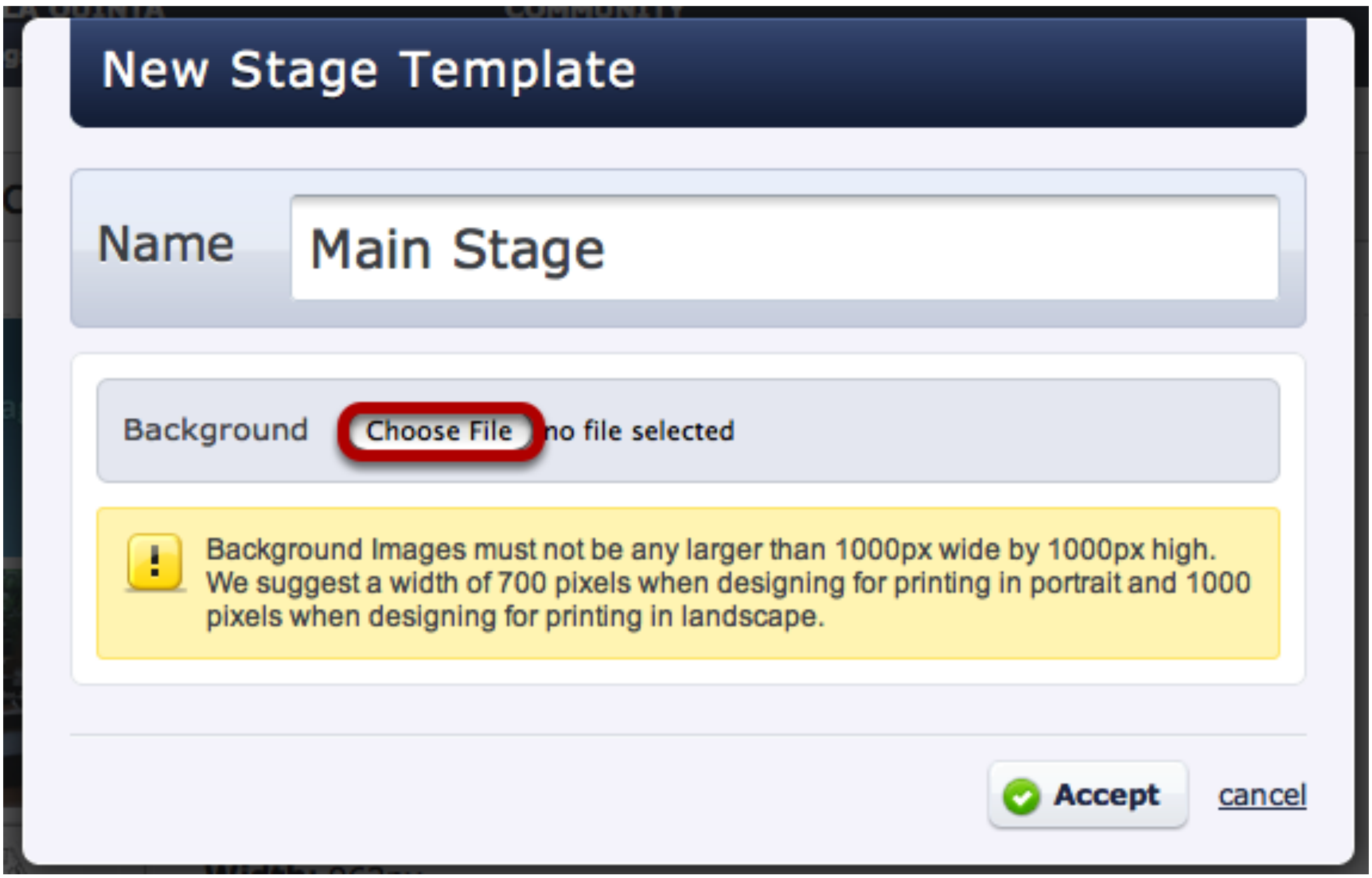
Drag and drop your people onto the stage. The people you've scheduled will be able to look at this when they are in the plan.

To add your own, click the link provided.

Click on 'create a new template'.



Import your stage layout picture.



Give your background template a name (above: Main Stage) and then choose which file to import. Make sure that your background fits the requirements listed. Once it's uploaded you will be able to choose that layout to use.

Deleting layouts you've added.

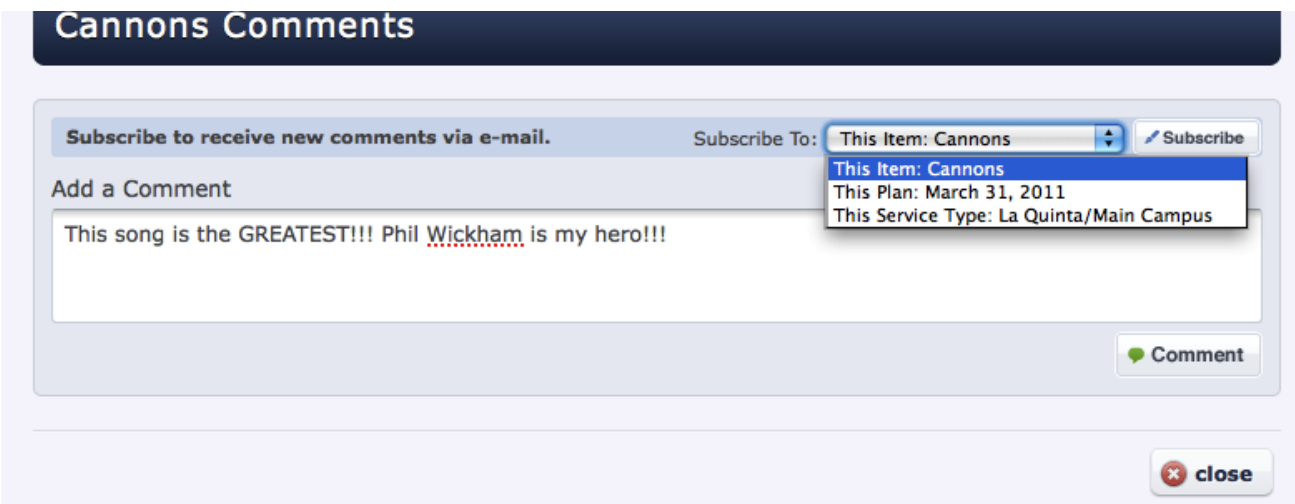
Click on the stage layout button and you will get this screen after you've added layouts. You can delete one you've added by clicking the red circle next to it.

Commenting and Subscribing to Plan Items

The ability to comment on Plan Items will depend on the permission level set for that service under it's properties.

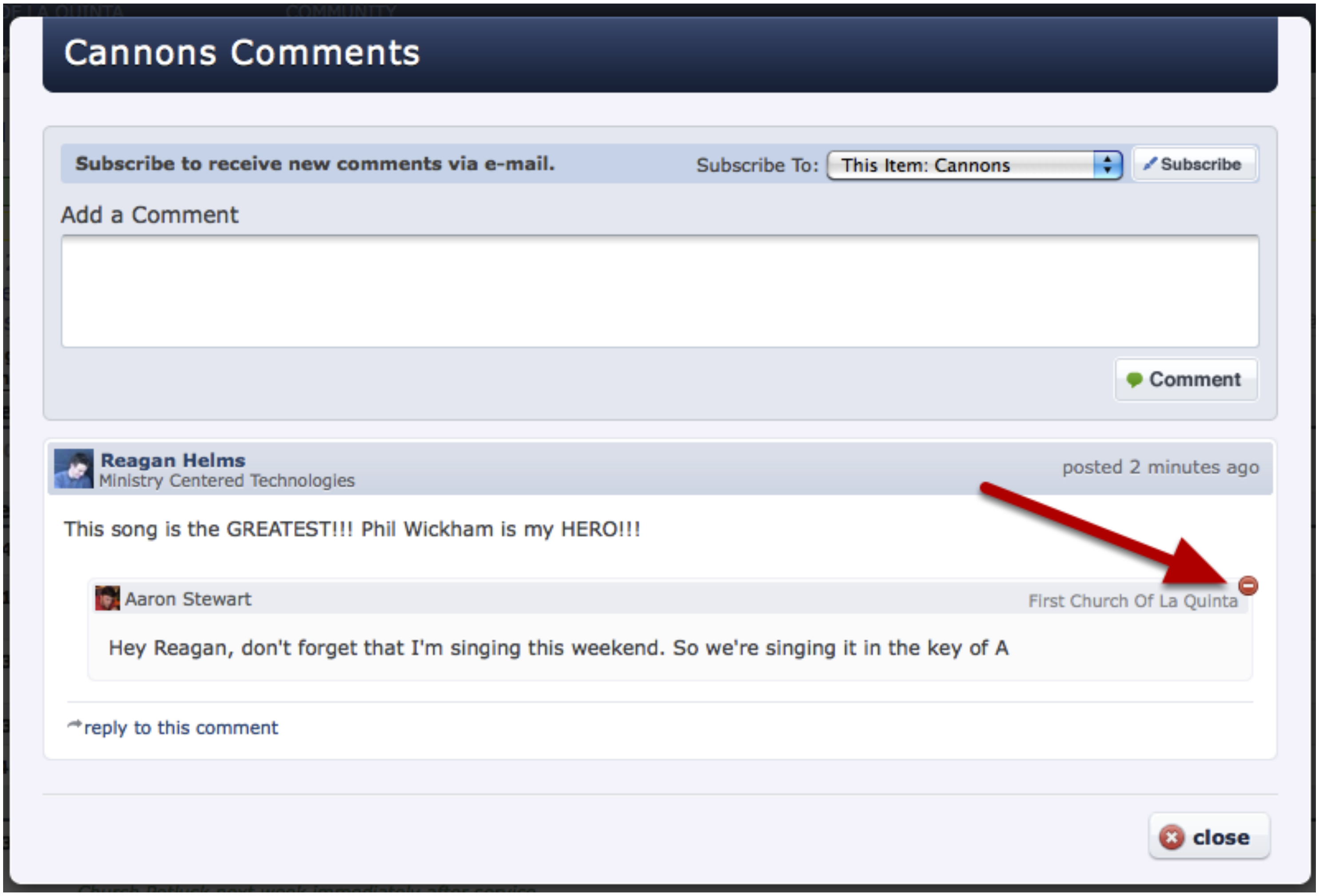
Hover your mouse over the item and click on the comment bubble icon

Enter your comment in the text field, and then select what your subscription preference



This Item: any time this item is commented on on your Planning Center site you will be notified.
This Plan: any time this item is commented on in this particular plan.
This Service: any time this item is commented on in the current service type that it is scheduled in.

To remove a comment, hover over it and click on the red circle that appears on the right.

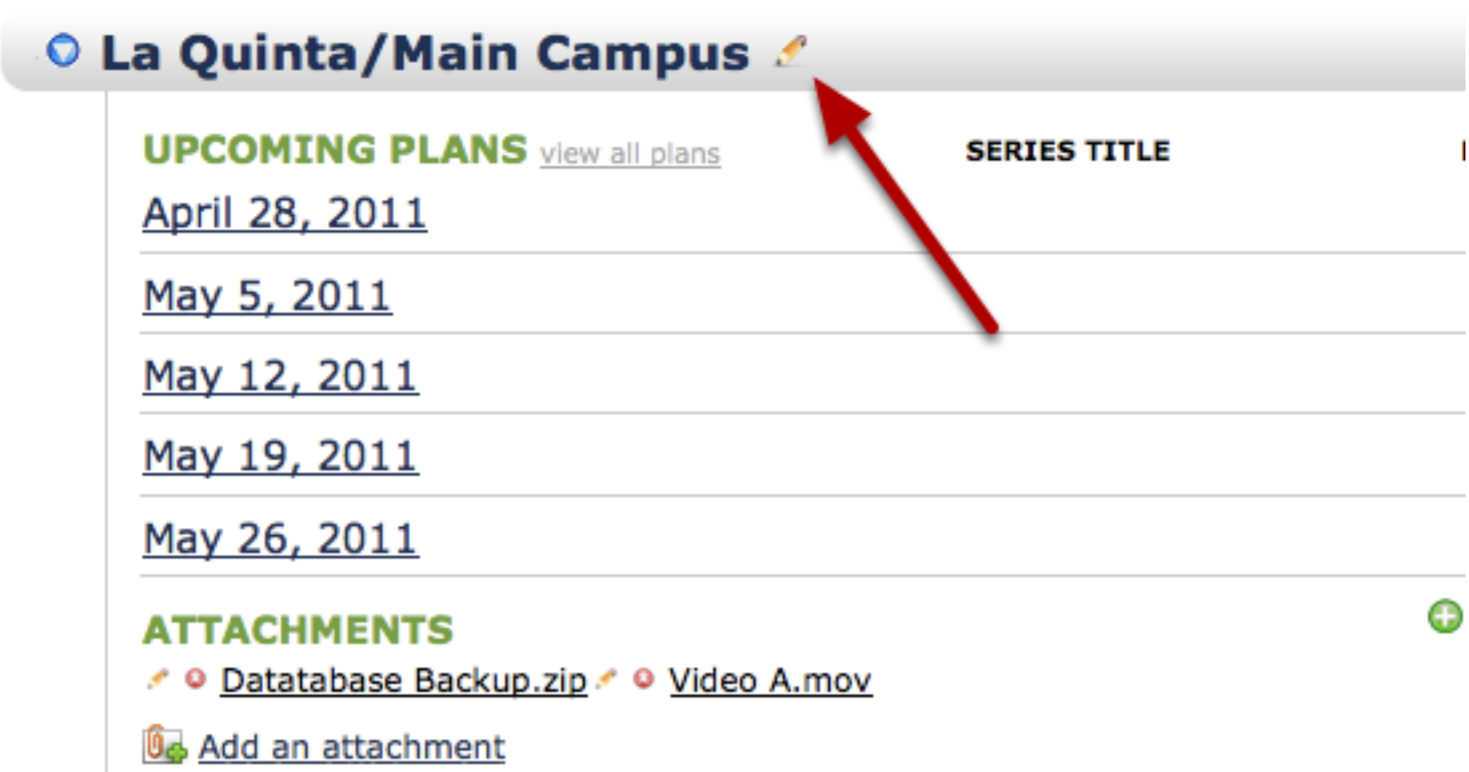


You will only be able to do this if you created the comment, or if you are an Administrator for that service.

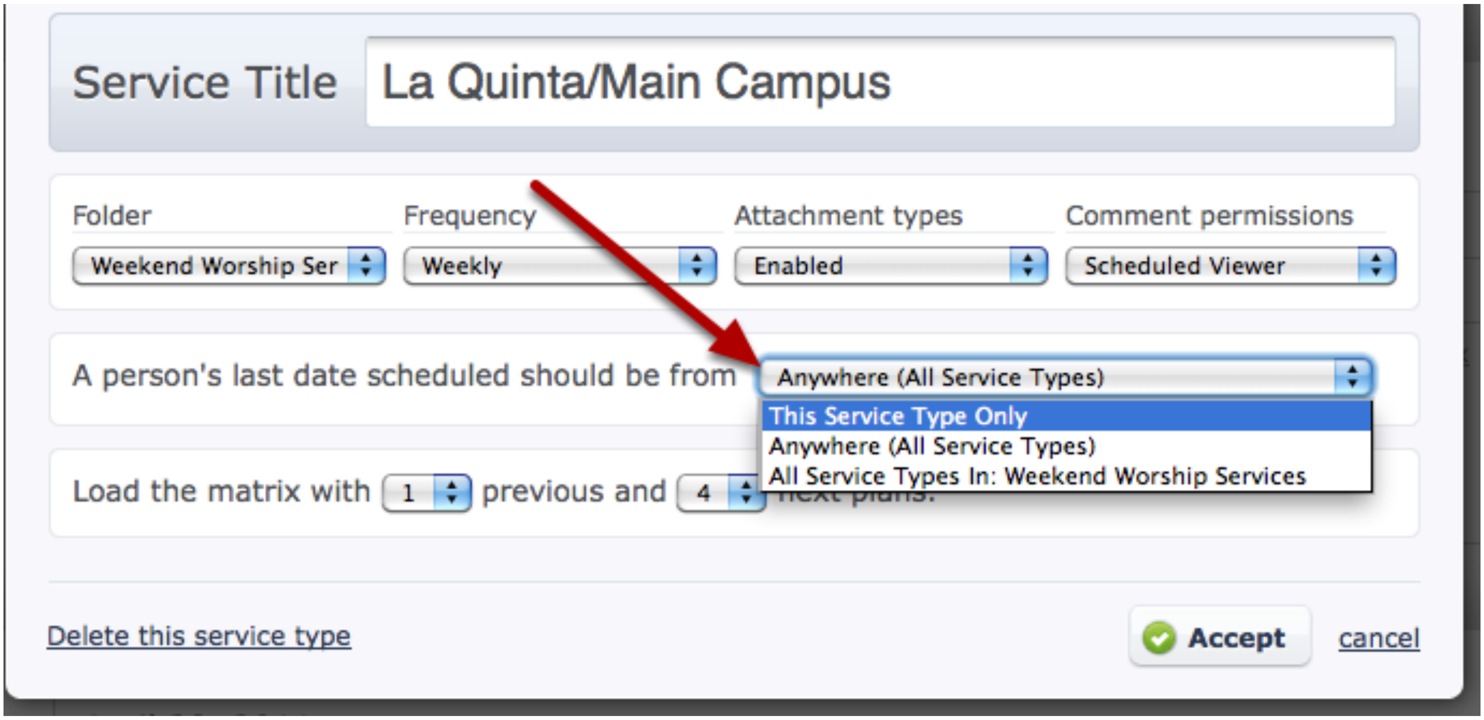
Changing Options For Viewing a Person's Last Scheduled Date

When scheduling a person to a plan, Planning Center sometimes shows you the last date a person was used. By default, this date is the date they were used in ANY service type in your whole organization. You can change that date to show you the last used date just in a specific service type, or even in any service in a specific folder.

To edit these options click on the pencil icon at the top of your service type



Then choose from the dropdown menue which option is best for this service.



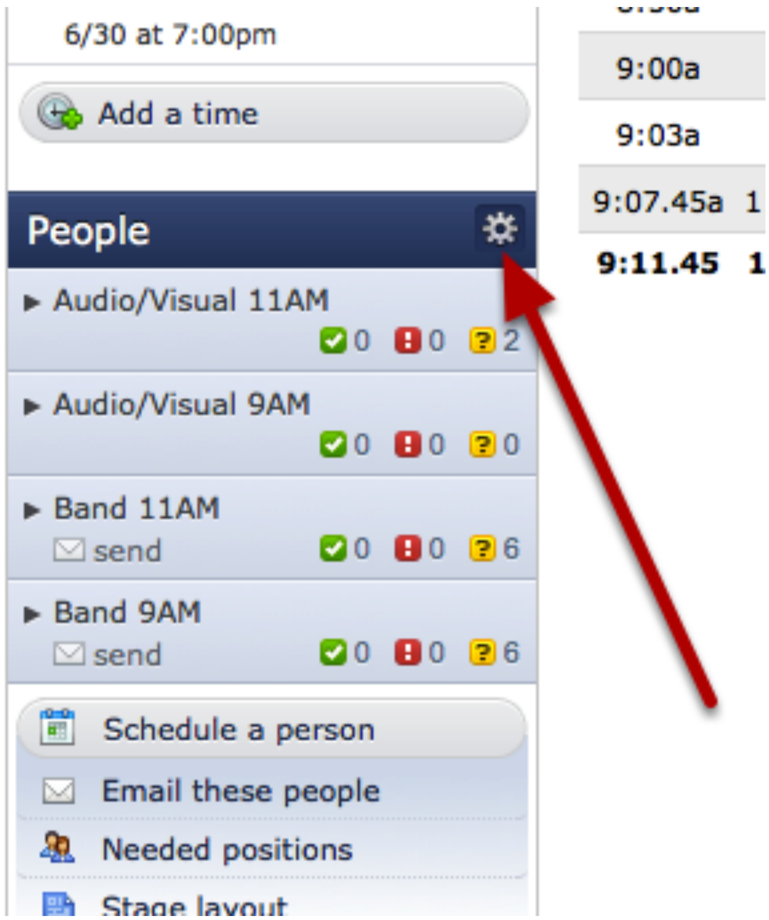
This Service Type Only - Will only show you the last time that they have been scheduled in this particular service
Anywhere (All Service Types) - Will show you the last time that they have been scheduled for any of the services in your account
All Service Types In: (folder name) - Will show you the last time that they have been scheduled to any service in the folder that this particular service is currently in. In this case "Weekend Worship Services".

The last scheduled that appears on the People Page and in the Matix will reflect the last time that person has been scheduled for any service type in the account.

Recovering Deleted Categories

This lesson shows you how to recover (or undelete) a category that you have deleted. This applies to people categories, note categories, and item note categories. Any categories that were deleted within the last 7 days will be available. Only administrators have this ability.

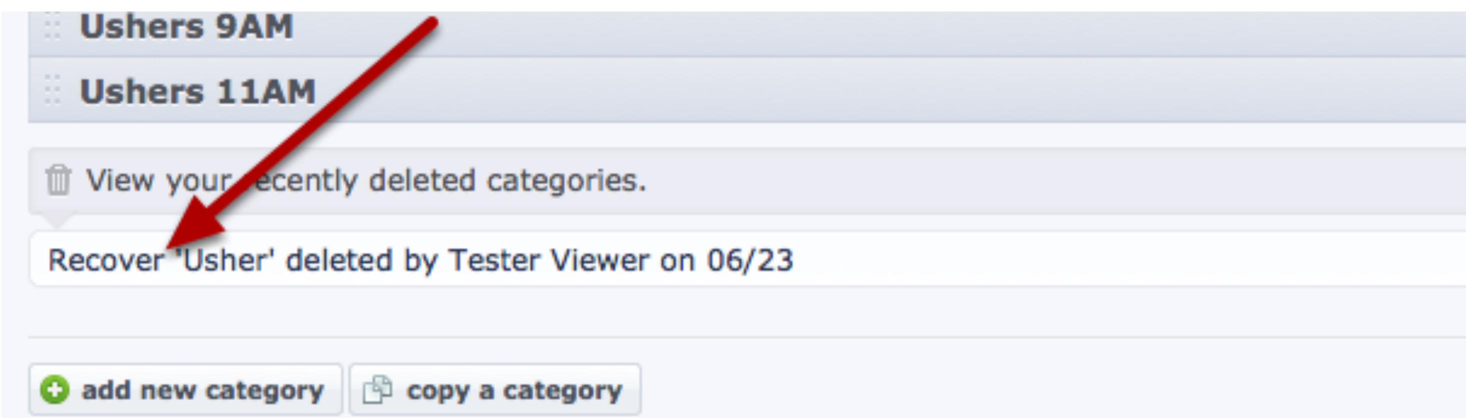
For a deleted People Category, hover over "People" inside of a plan, and click the settings button.



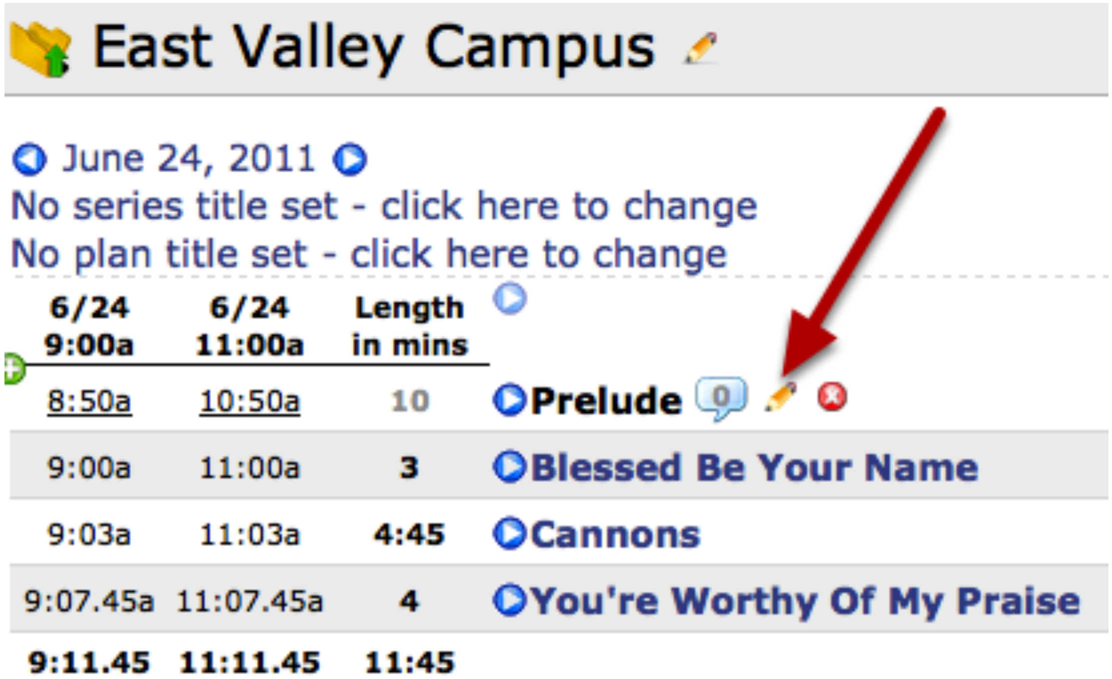
Click "View your recently deleted categories".

This will show you any of the categories that have been deleted within the past 7 days.

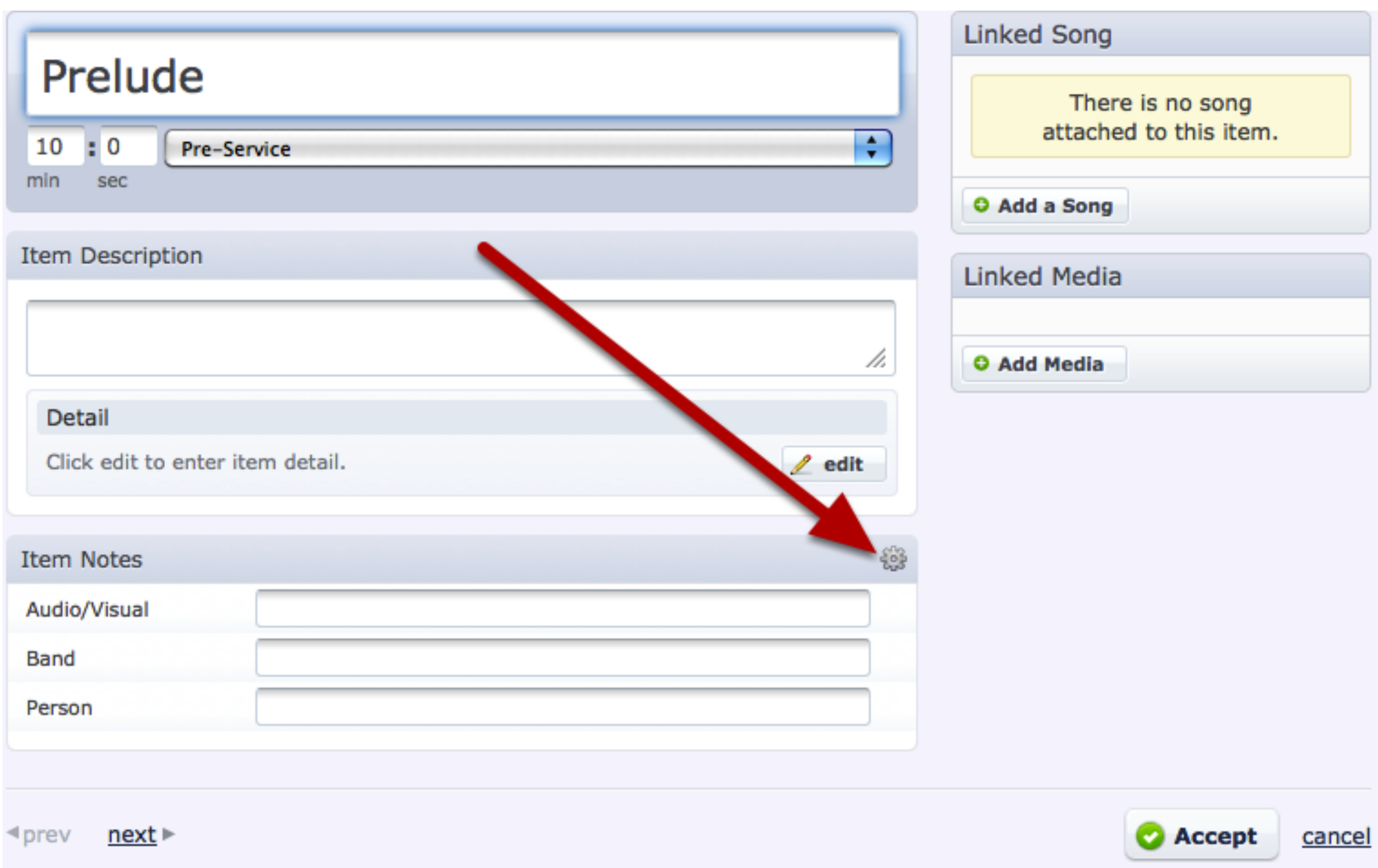
Click to recover the deleted category.



For a deleted Item Note Category, hover over an item and click the pencil.

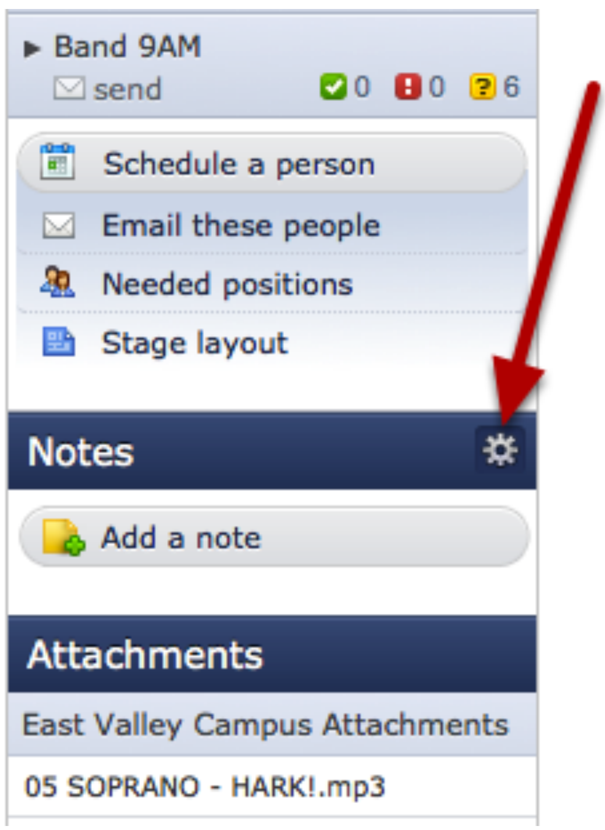


Hover over Item Notes and click the settings button.



Click to view categories, then recover any deleted categories.

Follow same directions for Note Categories.

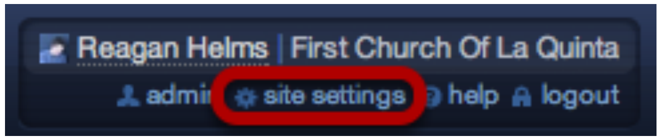


Site Settings

Site Settings

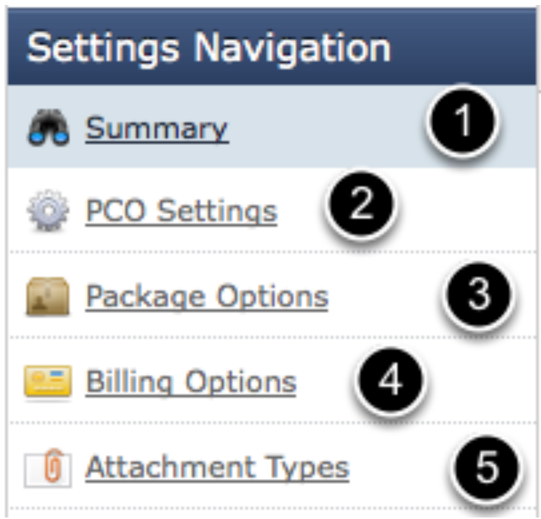
This is an overview lesson of each element of the 'site settings' page.

Click 'site settings' in the upper right corner



Note: only Primary and Secondary Site Administrators will have access to the 'site settings' page.

To the left of the 'site settings' page are 5 different tabs. Each of these will be covered in this lesson.



1. Summary (see below)
2. PCO Settings - Change the default settings for your account, including calendar, time zone, country and new user settings
3. Package Options - Upgrade, Downgrade or Enable Extra File Storage for your account
4. Billing Options - Change your payment information or view your billing history
5. Attachment Types - Attachment types allow you to set up your files in such a way that your users only see the files that are meant for them.

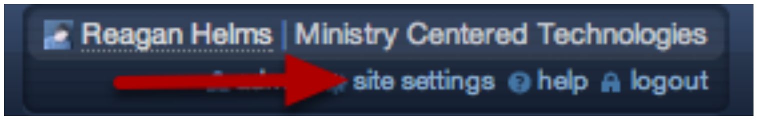
Summary Page

1. This is the Primary and Secondary Admin area of your account. Any Changes to Administration of the account would be done here.
2. This area is a summary of your usage of your site. It lists the number of services, plans, people, files and total file space used in your account. You can delete files from your account by clicking on the link next to 'File Space'.
3. This is the area of your account where you can change your church name by clicking on it, or Upload a logo or cancel your account.
4. This area of your account is where you would Enable or Disable Music Stand.

PCO Settings

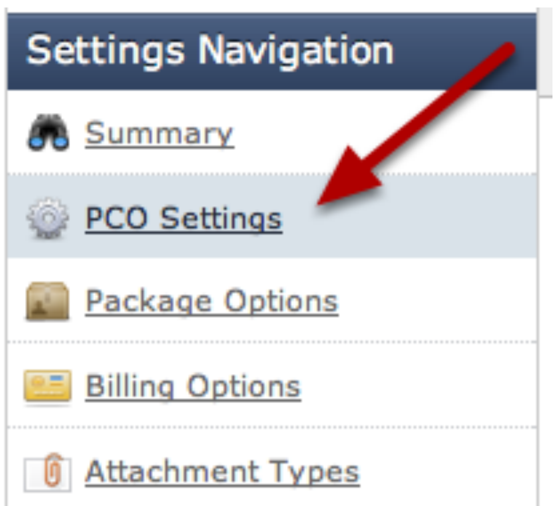
Change the default settings for your account, including calendar, time zone, country and new user settings

Click on 'site settings' in the upper right corner

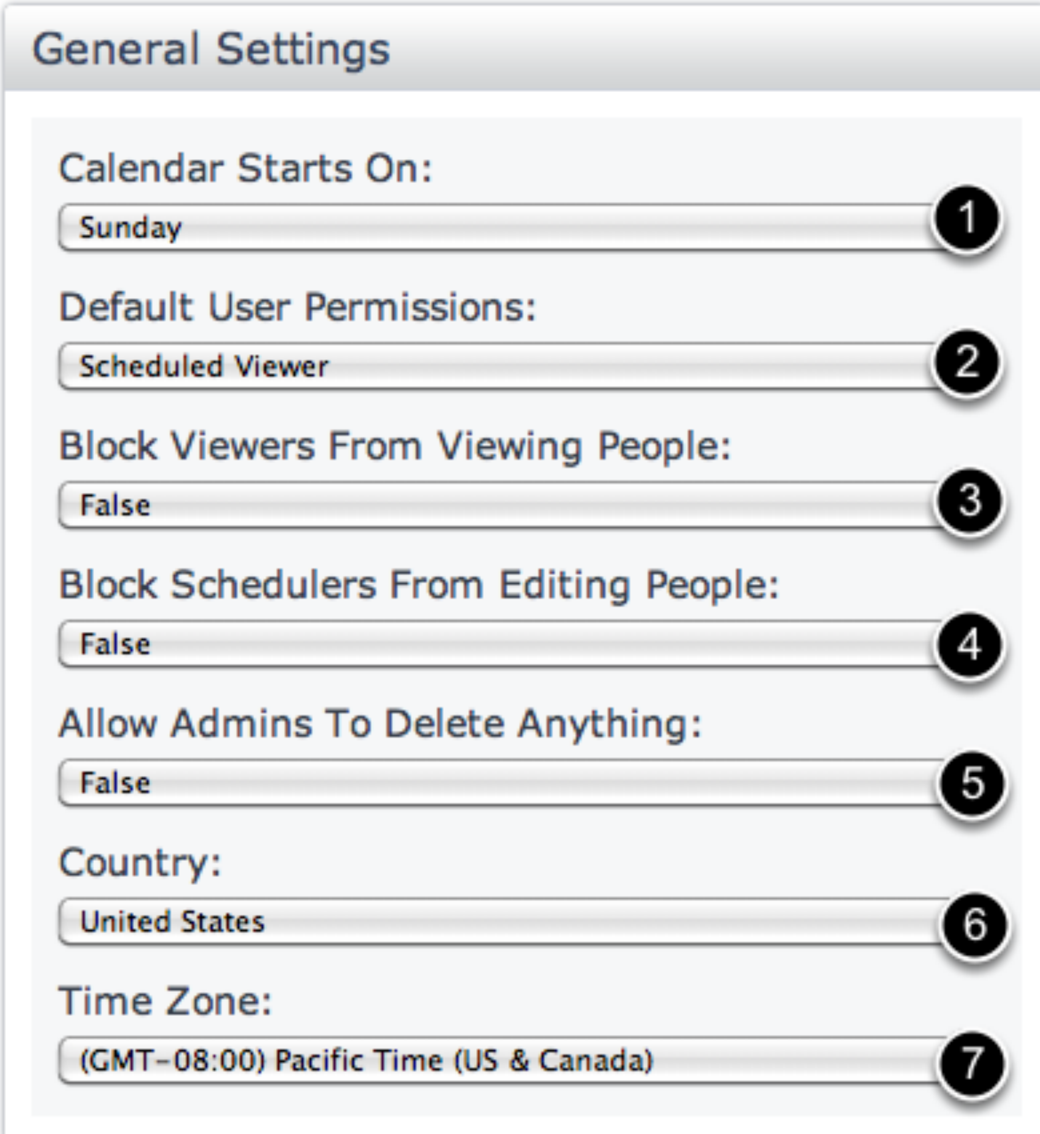


Note: only Primary and Secondary Account Administrators will have access to the 'site settings' page

Then on 'PCO Settings' on the left



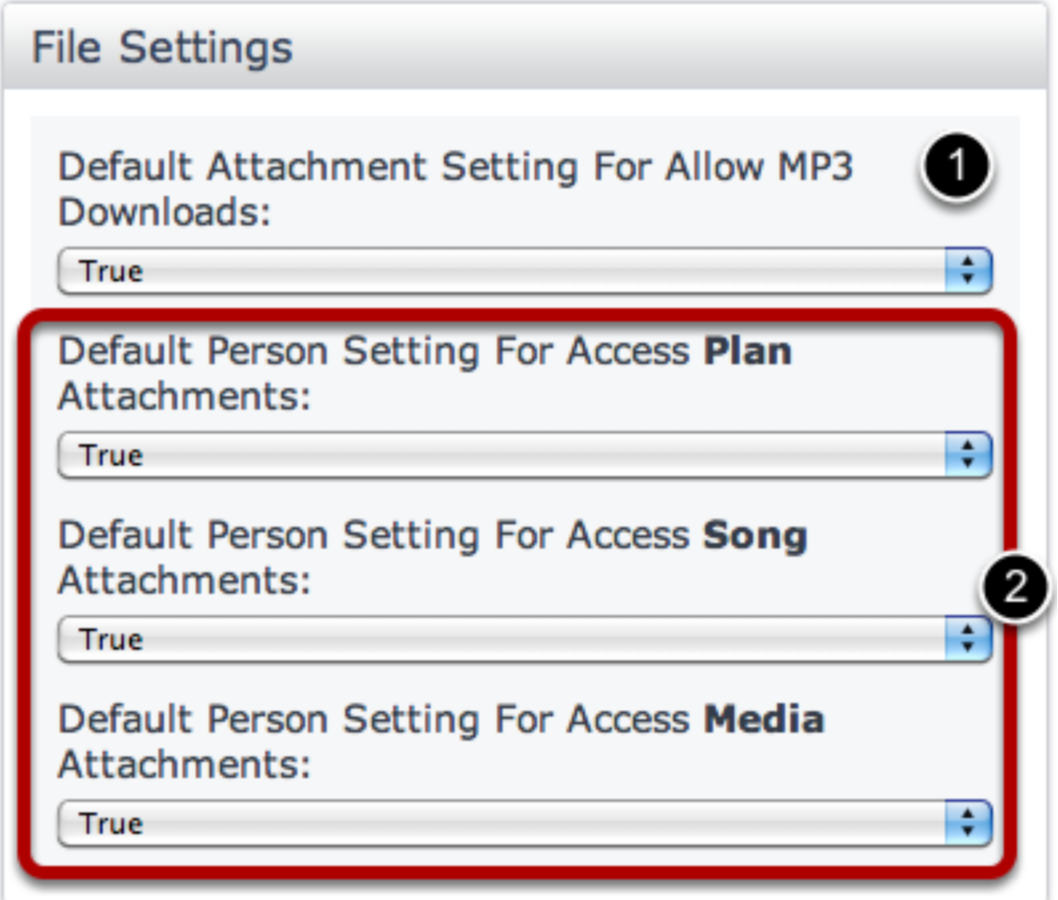
General Settings



This is the area where you would change the settings for your Planning Center account.

1. What day your Calendar starts on.
2. The default permissions for a new user in your account.
3. The ability to block Viewers from viewing the people page and the contact information there.
4. The ability to block Schedulers to edit people.
5. The ability to allow Administrators to delete anything in your account, not just things they have added.
6. Set your country.
7. Set your time zone.

File Settings



This is the area where you would set your default file settings for your account

1. Whether users can download Mp3 files or not (this won't change the setting for Mp3's already uploaded to your account, only the default setting for new Mp3's) See our lesson on Enabling or Disabling the Downloading of Mp3's for more
2. The default settings for the access of plan, song and media files for a new user who is added to the account.

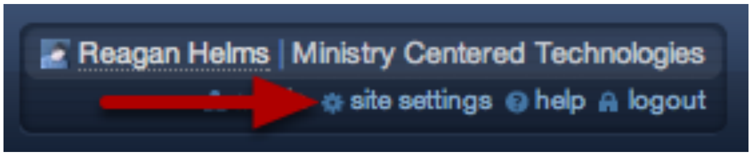
CCLI Settings

This is the area where you would add your church's CCLI number or enable CCLI Reporting for your account

Package Options

Upgrade, Downgrade or Enable Extra File Storage for your account

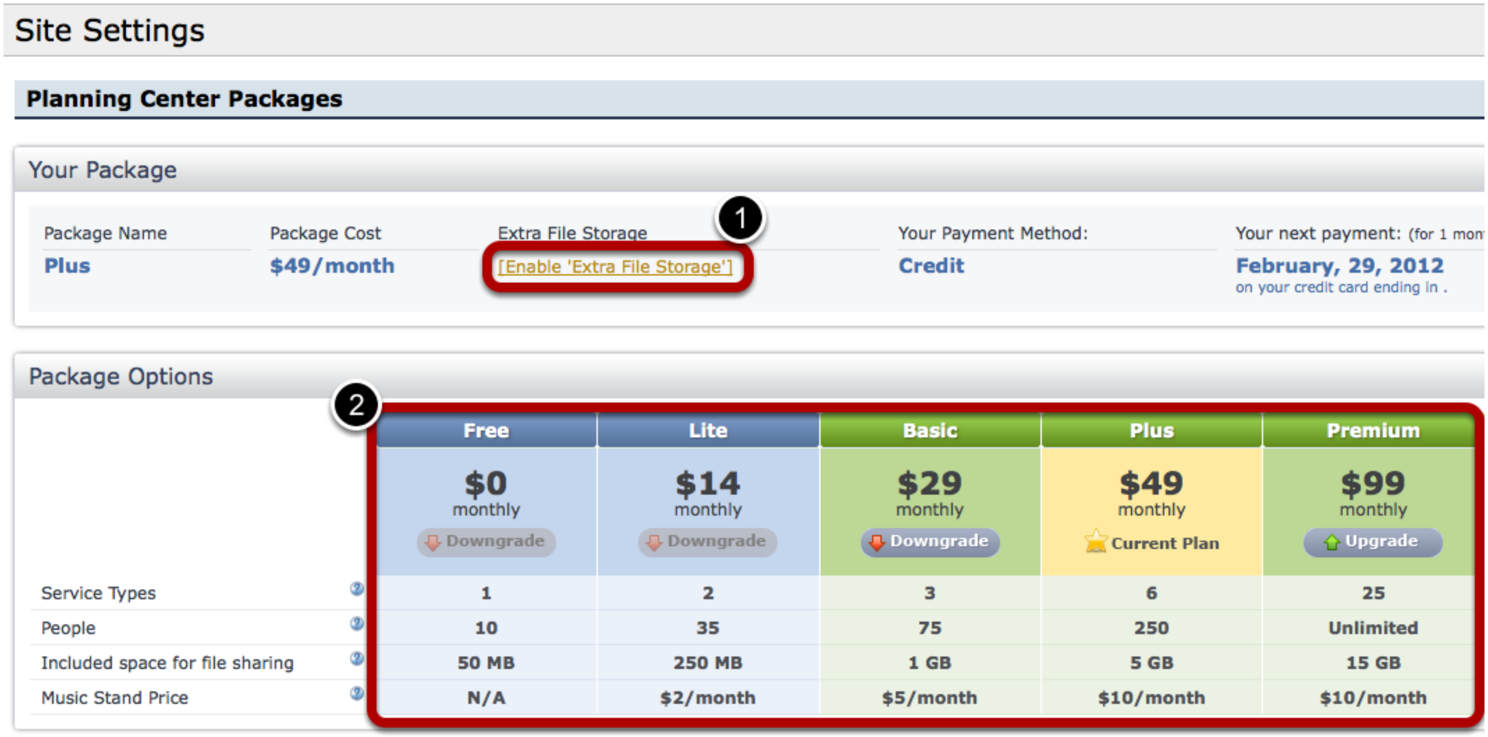
Click on 'site settings' in the upper right corner



Note: only Primary and Secondary Account Administrators will have access to the 'site settings' page.

Then on 'Package Options' on the left

Package Options



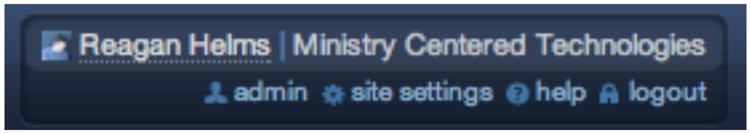
1. This is where you can Enable Extra File Storage for your account if you've reached the allotted amount for your current package
2. This is where you can view all of our available packages.

- The gold Star/highlighted package is your current plan
- You can Upgrade your account by clicking on the buttons with the Green Up Arrow
- You can Downgrade your account by clicking on the buttons with the Red Down Arrow
- If the button is grayed out, that means that your account doesn't match with the requirements for downgrading and people, services or files will need to be deleted first.

Billing Options

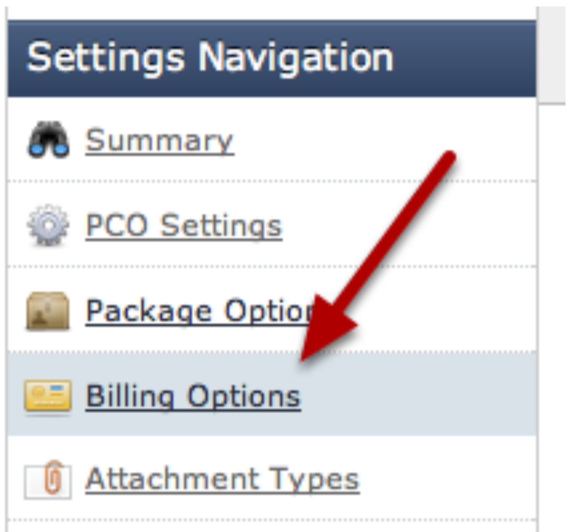
Change your payment information or view your billing history

Click on 'site settings' in the upper right corner

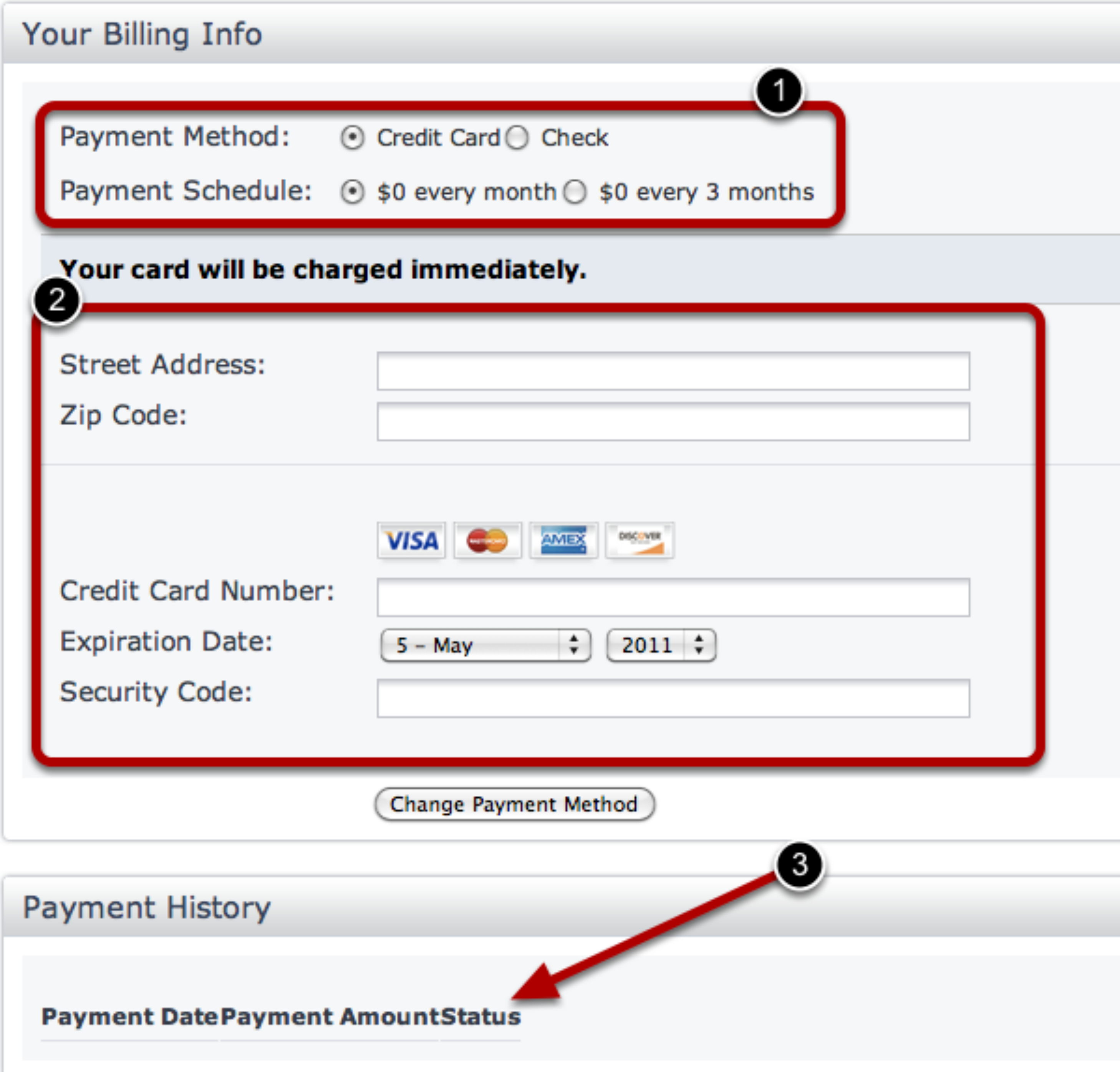


Note: only Primary and Secondary Account Administrators will have access to the 'site settings' page.

Then on 'Billing Options' on the left



Billing Options

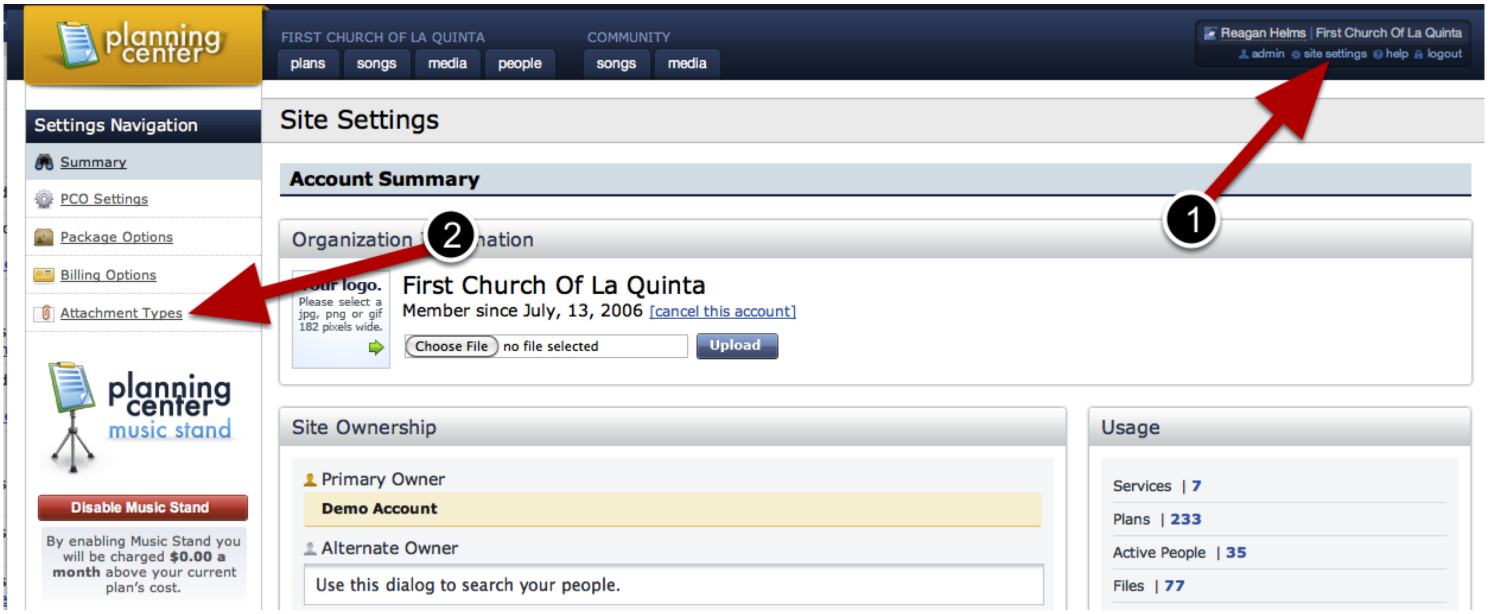


1. Set your Method of Payment, and Payment Schedule here. We offer the ability to pay by Credit Card for 1 or 3 Months, or by Check for 6 or 12.
2. Enter your Street Address and Credit Card information here.
3. Your account's payment history will appear here once a transaction has transpired.

Attachment Types

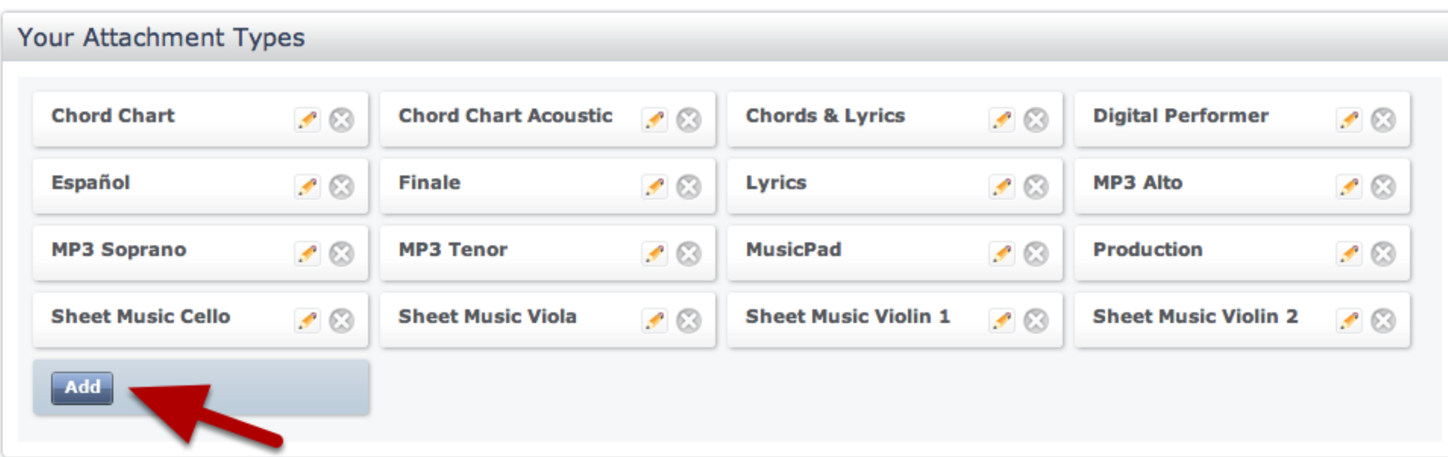
This lesson describes how to set up attachment types. Attachment types allow you to set up your files in such a way that your users only see the files that are meant for them.

Go to the Site Settings page and click Attachment Types.

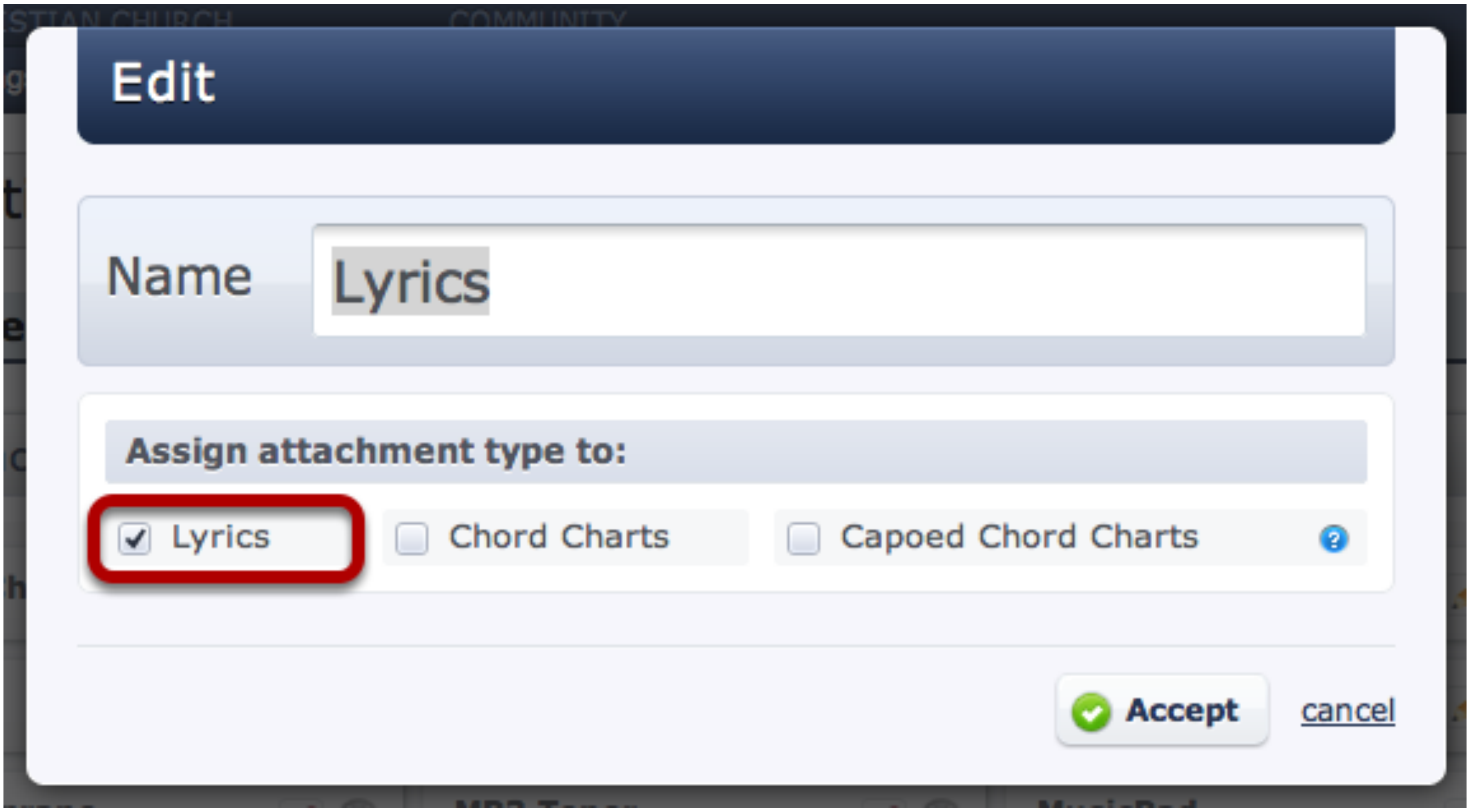


Only the Primary and Secondary Account Administrators can access the site settings page.

Click the blue add button



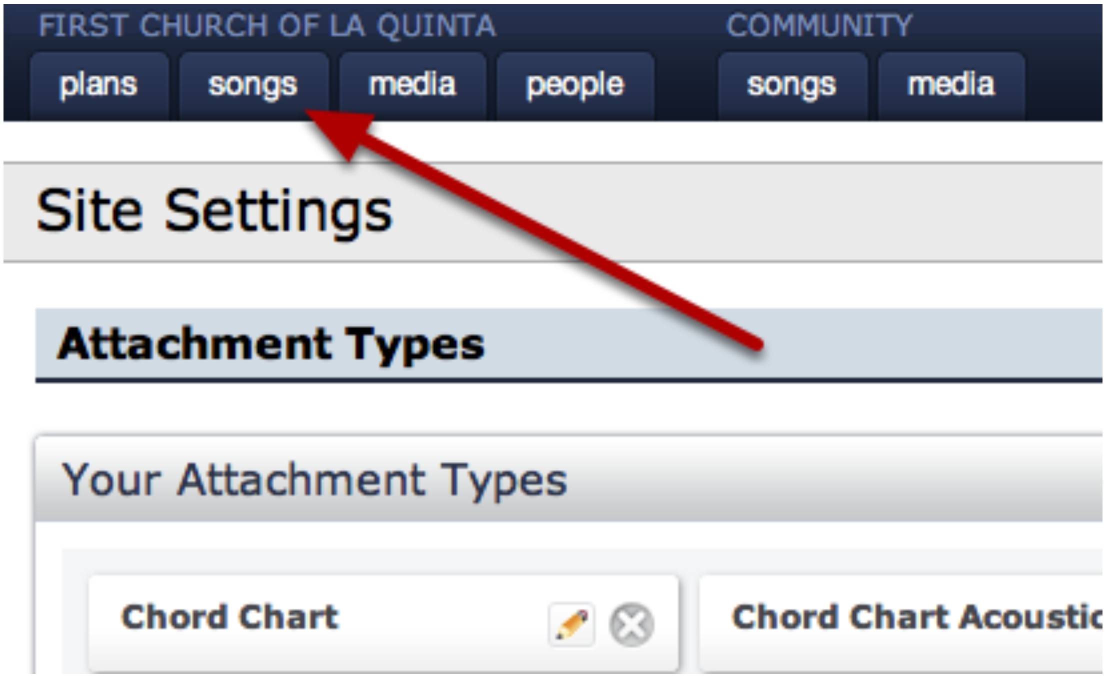
Add your attachment type



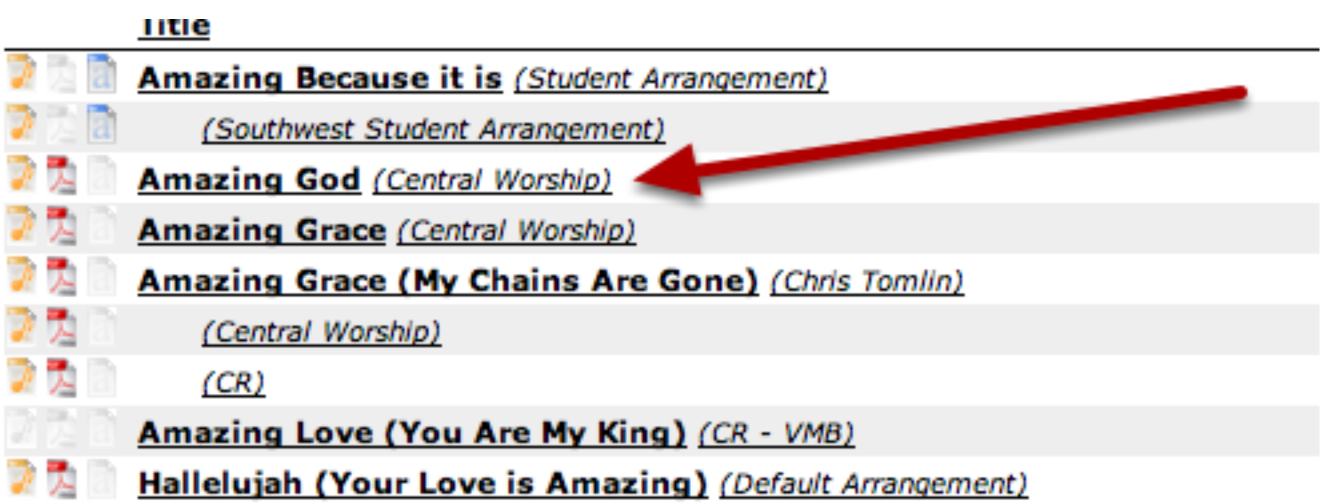
Name your attachment type and then choose if you want to link it with any of Planning Center's Lyrics & Chord PDFs.

In this example, I want to be able to label some of my files as lyrics files, so I've created an attachment type called lyrics. I also want any of the lyric PDFs generated by Planning Center's Lyrics & Chords feature to be auto-assigned to this attachment type, so I've checked the Lyrics box in the bottom left.

Next, go to the Songs tab.

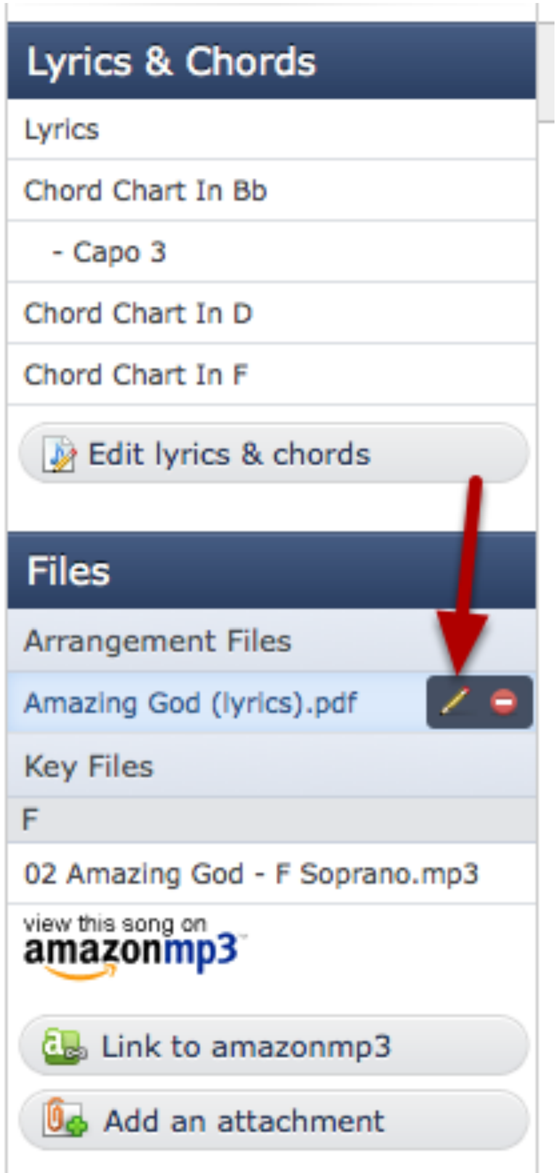


Click the song or arrangement title of the song you wish to designate files to.

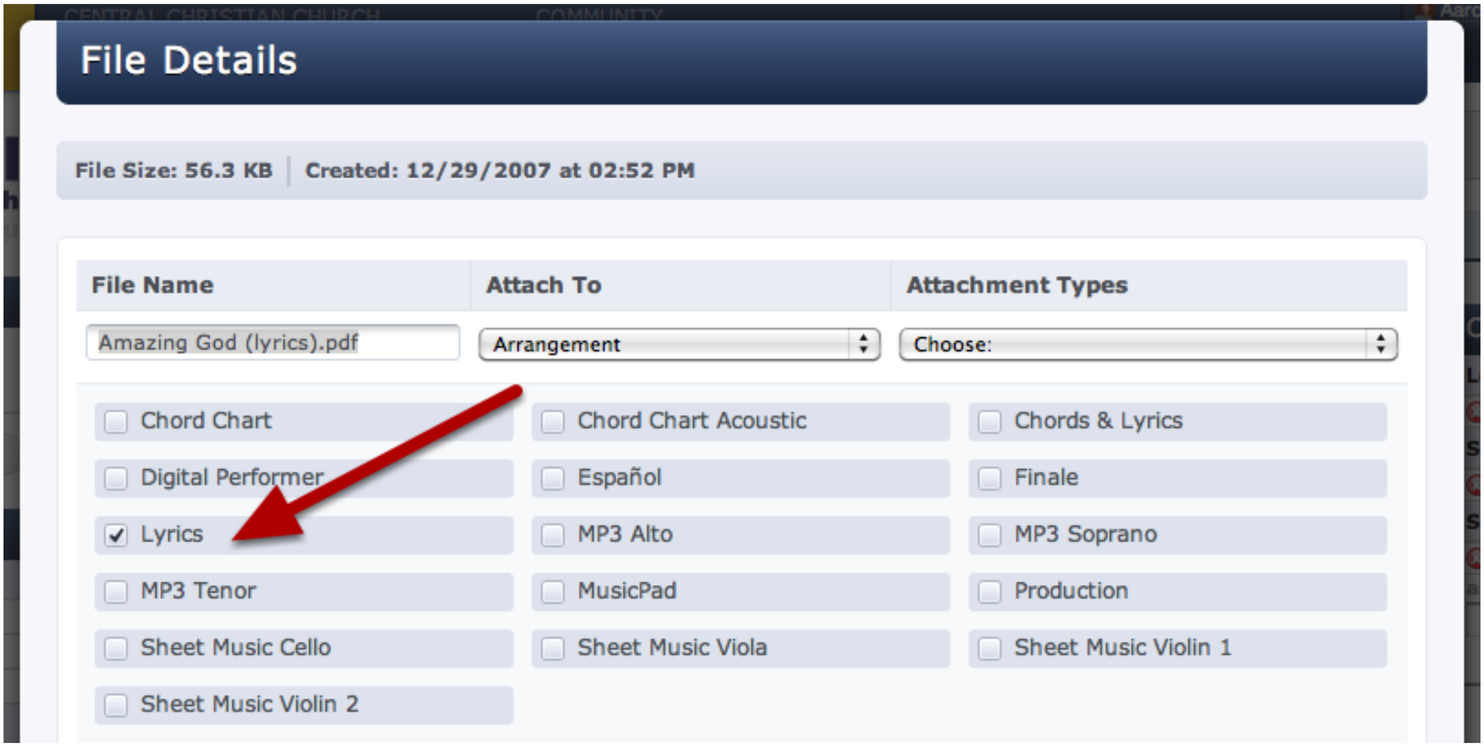


This step allows you to assign an attachment type to each file that you have for a song.

Hover over the file and click the pencil that appears.



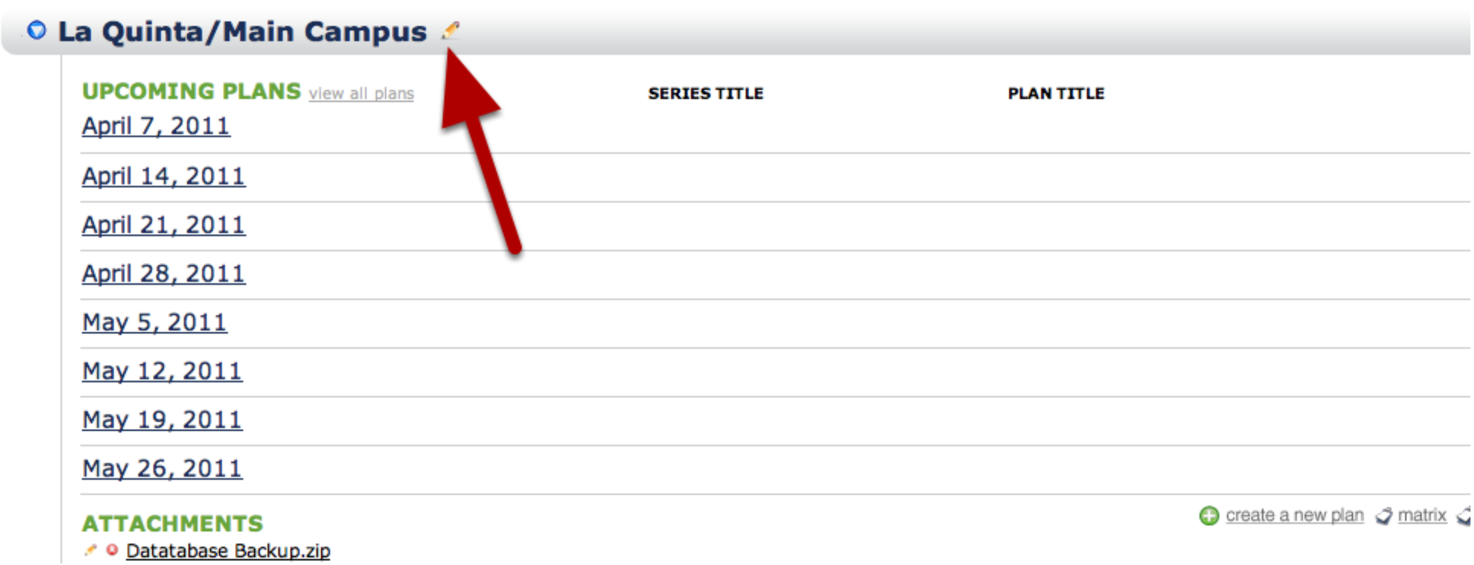
Check the appropriate attachment type that you want this file to be connected to. Make sure to click Accept (very bottom of the box) when finished.



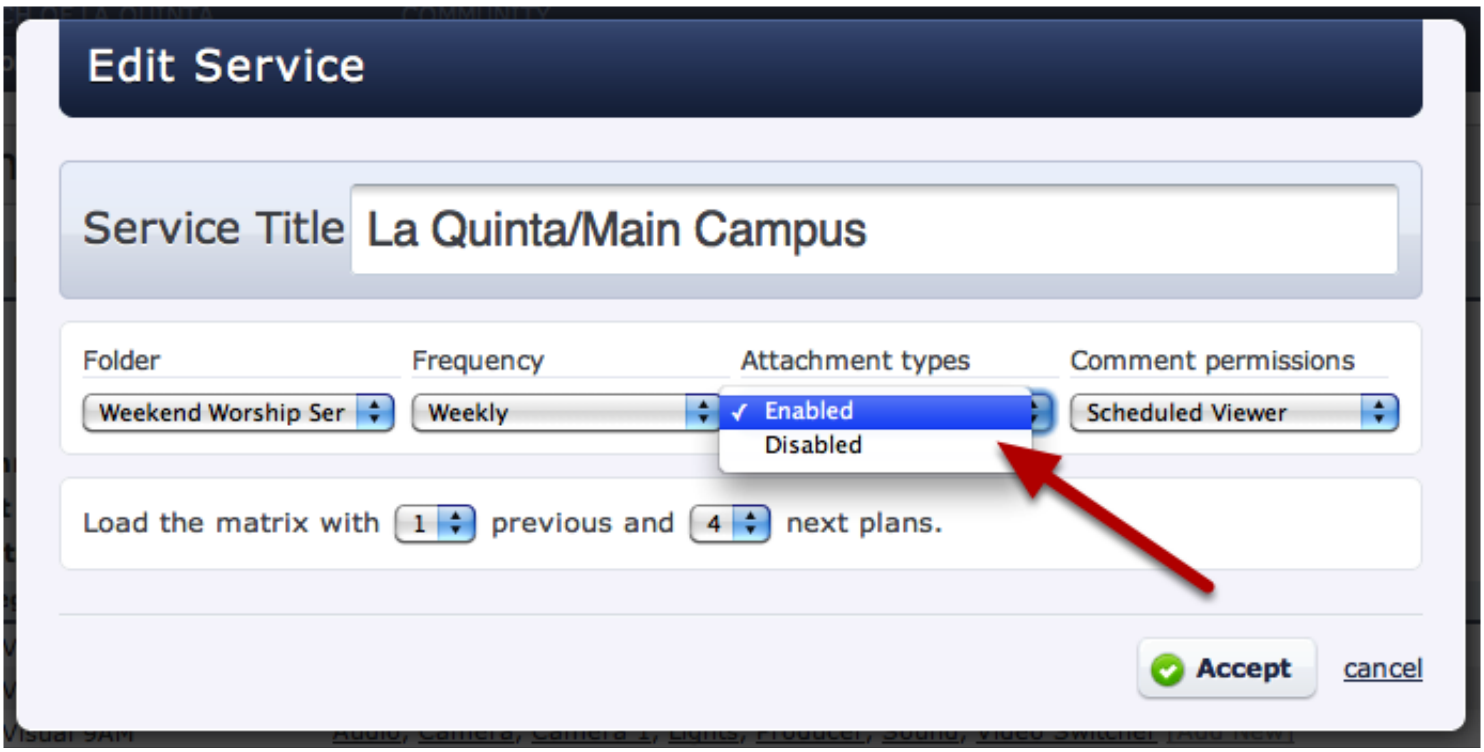
Note: If under "Attachment types" the drop down box says Unspecified, click on it, then click "Choose:" and all attachment types you've set up will appear, just as in the picture above.

Once you're done with assigning any and all files to attachment types, go to the Plans tab.

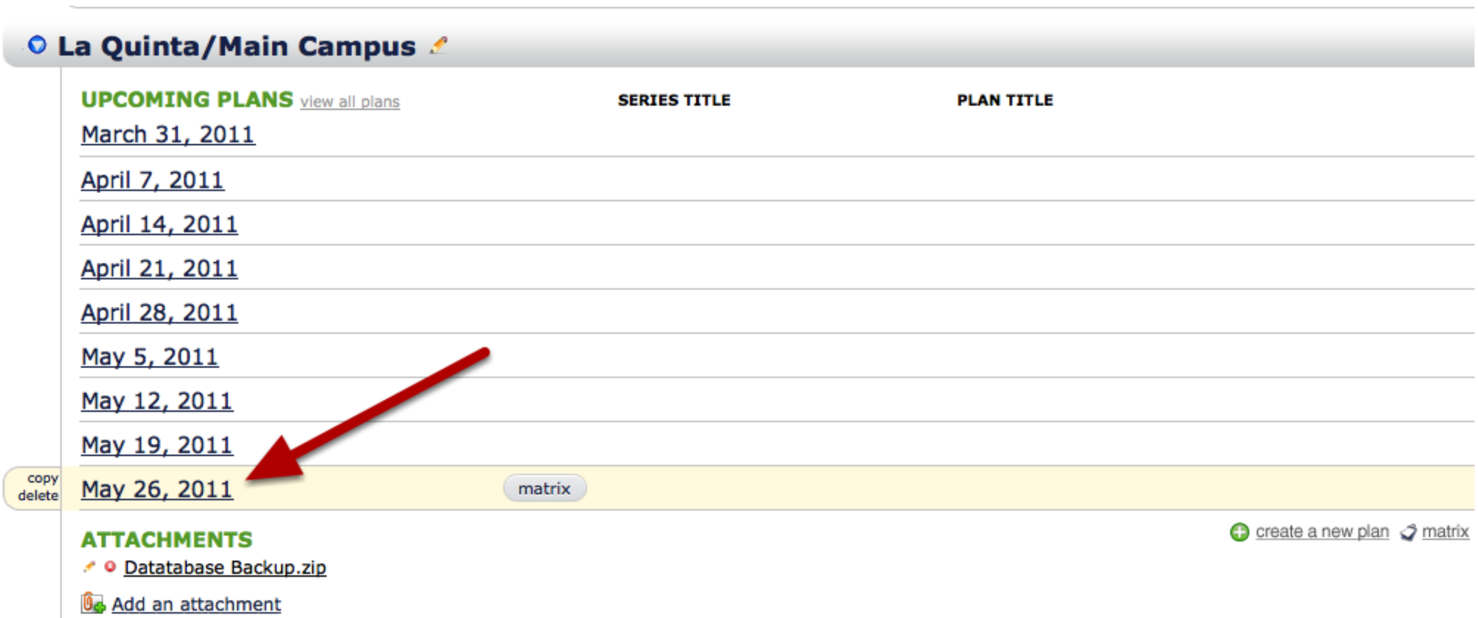
Click the pencil icon for the service you are working in.



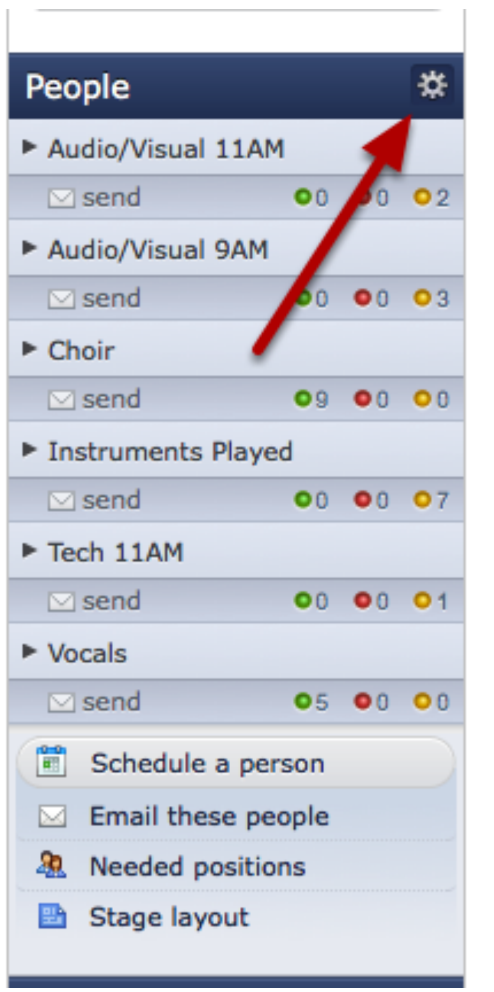
Then select Enabled from the drop down



Go into one of the plans that you are working on

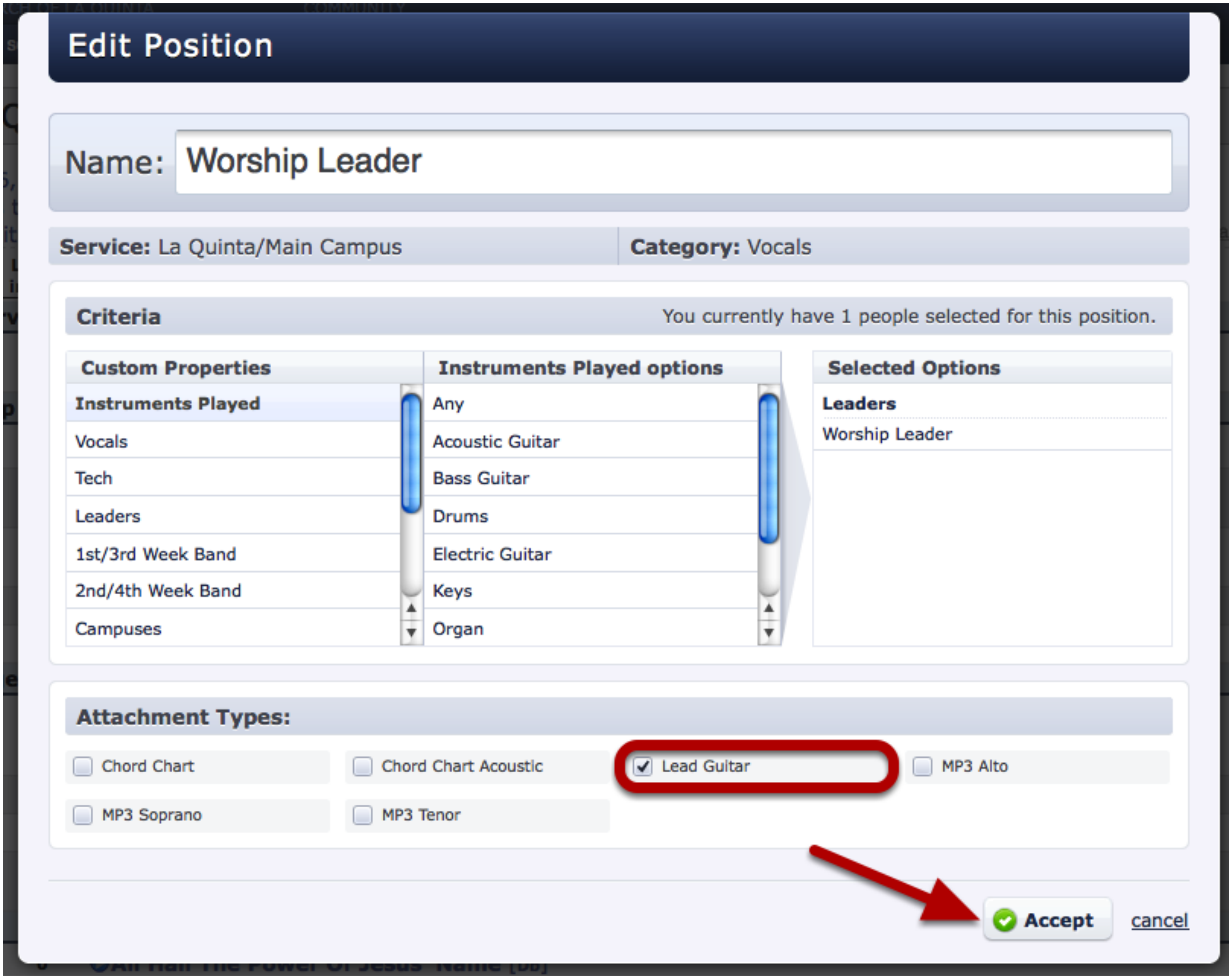


Hover over the People sidebar and click on the gear icon next to your people.



Select one of your People Categories, and then click on the pencil icon next to a Position

Set which attachment types this position will be allowed to see. Click accept when finished.



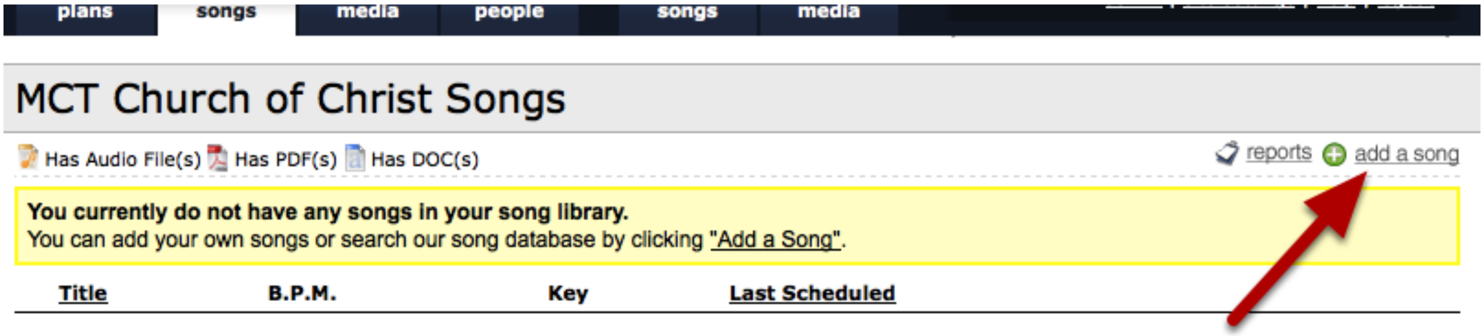
This step links your attachment type files with this position. This is the final step in the process!

Now your people will only see or download the files that are associated with their position.

Note: Scheduled Viewers won't even see files that aren't designated for them. But Viewers or those with permissions above will see them- however, the files meant for them will be in bold. And, if they go to Download All PDF's, only the files meant for their position will download.

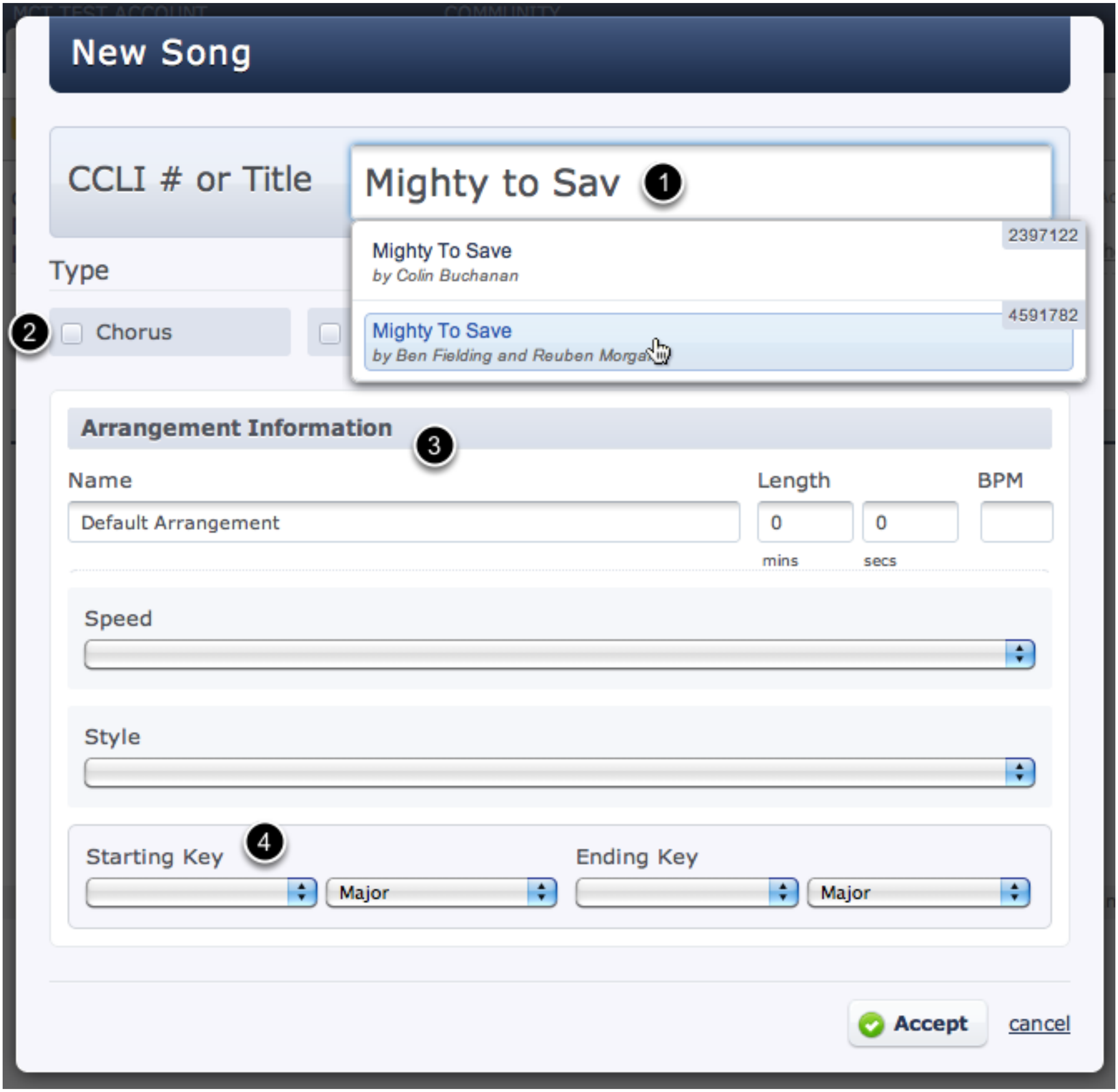
Songs

Songs Page: Add A Song



Your account starts off with no songs in the database. To add a song, just click 'add a song' in the top right corner.

Enter Song information



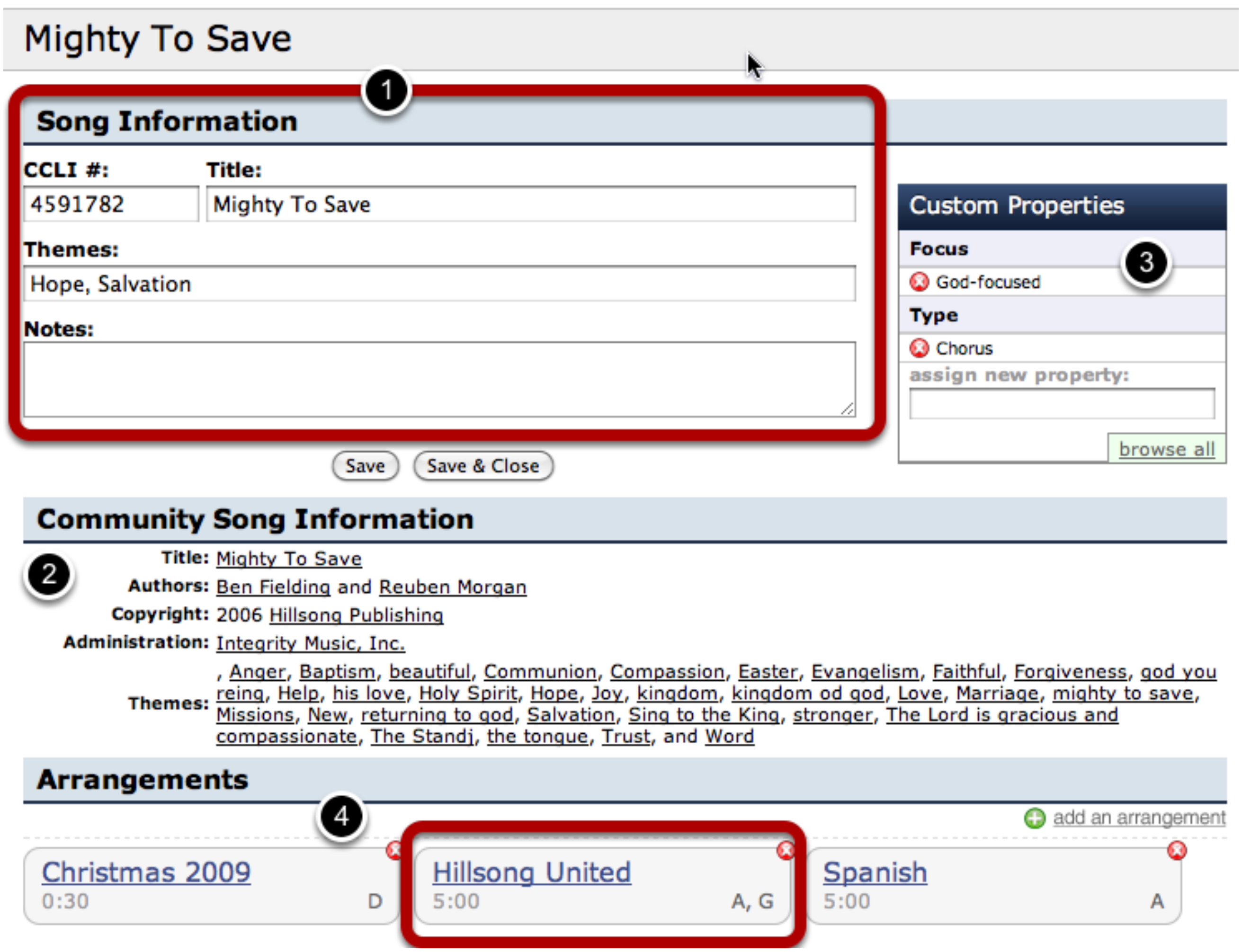
1. Type the name of your song and Planning Center looks it up on CCLI to import all the copyright information.
2. Each song can have **Custom Song Properties** to help you organize them better. Planning Center starts you off with the *Type* property with options for *Chorus, Hymn, Instrumental, & Special*.
3. Every song must have at least one arrangement. Be as descriptive as possible with your

arrangment names. If your arrangement is by a certain artist, you can title your arrangment with the artist name, like *Hillsong United* or *Michael W. Smith*. If it is not based on an artist, you might title it by your band or ministry name, like *High School Version*. Each arrangement has its own Length, Beats Per Minute (BPM) and Custom Arrangement Properites, like Speed and Style.

4. If your arrangement starts and ends in the same key, just enter the starting key and leave the ending key blank. (In the future, you can add multiple Keys to each arrangement and then choose which key you want to use each time you use that song. You can attach different files to each key, or attach files to the arrangement (like lyrics) so that they are available for all keys.)

Once you've entered your song, arrangement & key information, click the Accept button to add that song to your plan.

Song has been created



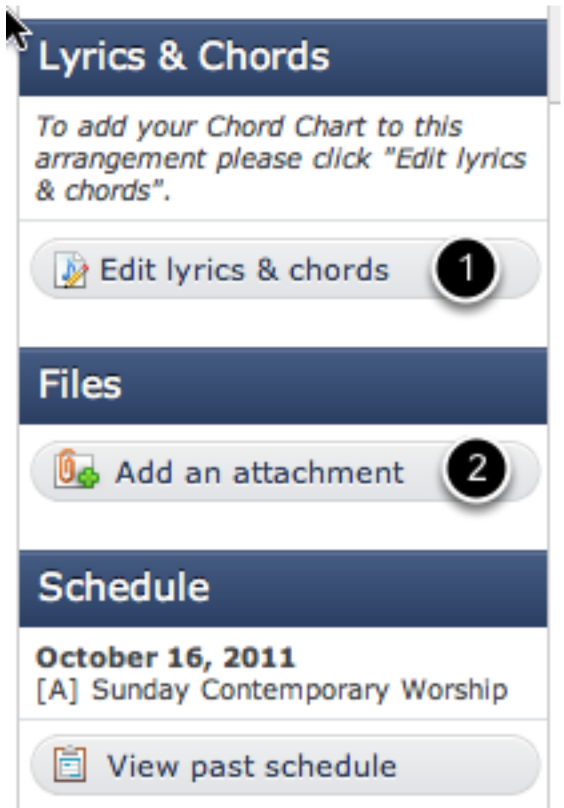
Your individual song page will look similar to this.

1. The basic song information is editable and can then be used to help you search and filter your

entire songs library.
2. All CCLI information has automatically been imported with this song.
3. Use Custom Song Properties to tag your songs and then filter them by these properties.
4. Arrangements allow you to attach different files to different versions of your song. You can also see I have added 3 different arrangements for this song. Click on any arrangement name to attach files, or enter lyrics, chords or song sequence.

Note: No files of any kind are automatically imported with the song. You will need to add any files that you wish to be associated with this song.

Add Files to an Arrangement

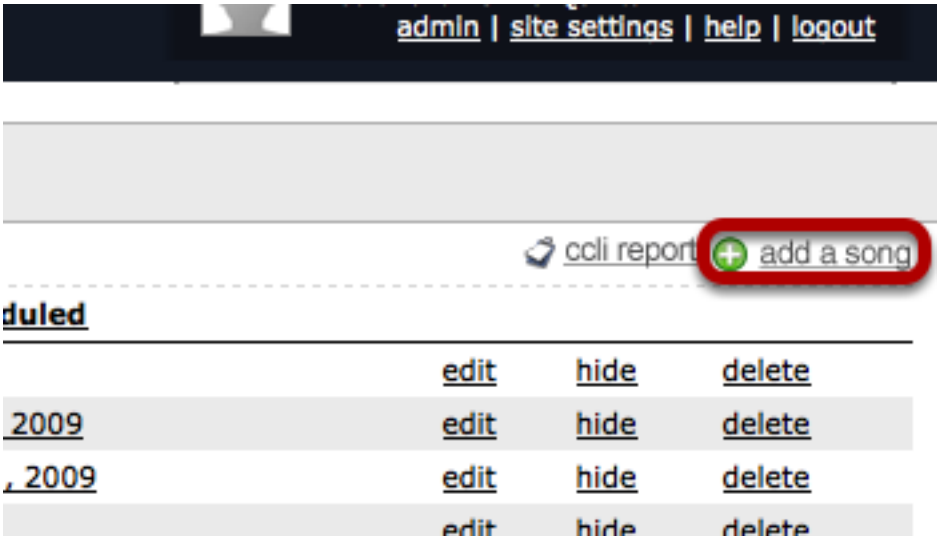


After clicking on an arrangement name, add files, lyrics or chords.

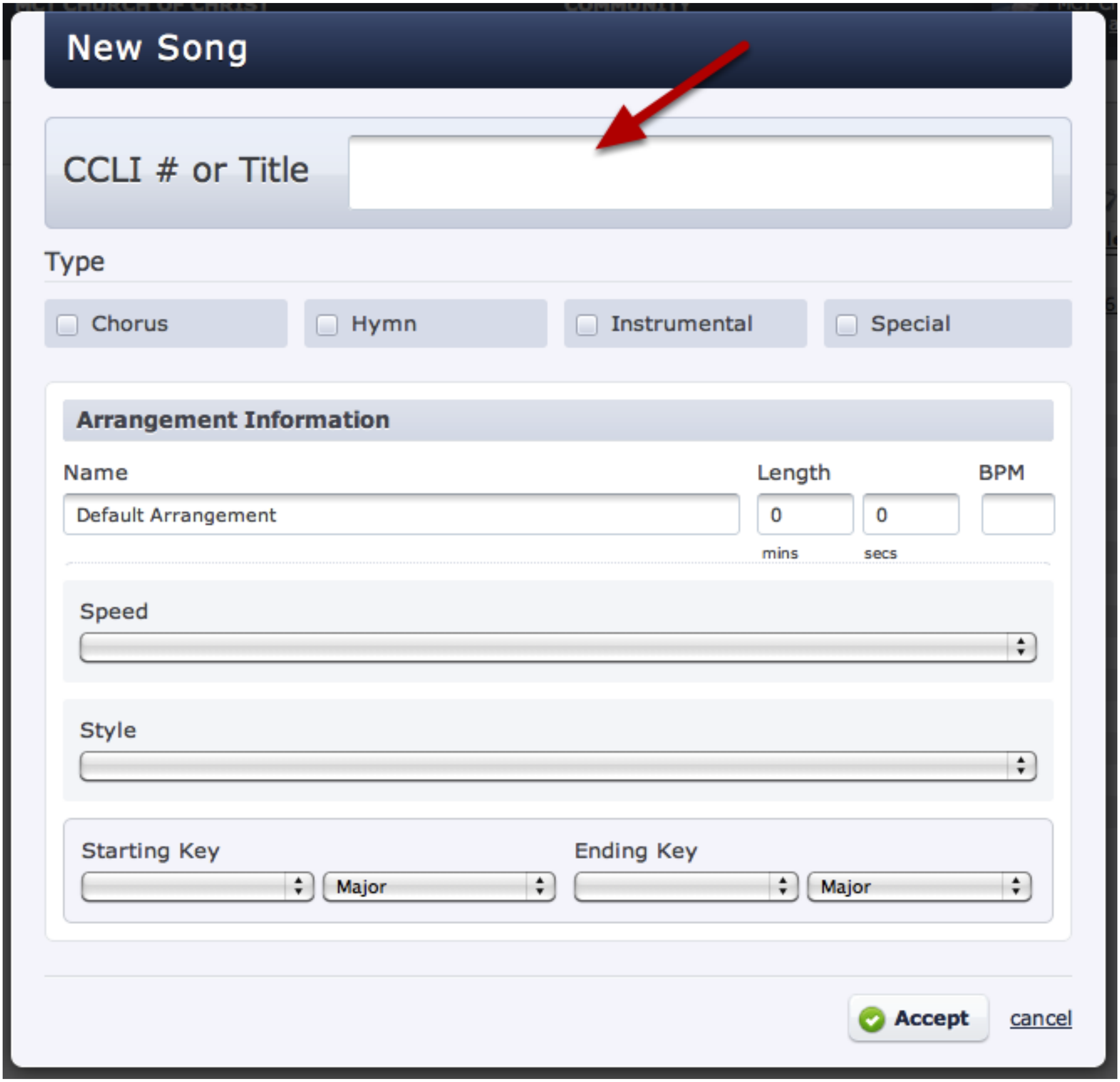
1. Type or Copy/paste a chord chart into the "Edit lyrics & chords" area which will automatically transpose the chart, and create an optional lyric sheet
2. Add an attachment. Then choose to upload a file from your computer, link to a file on the internet, or link to a file on iTunes or AmazonMP3.

Adding a New Song

Click "add a new song"



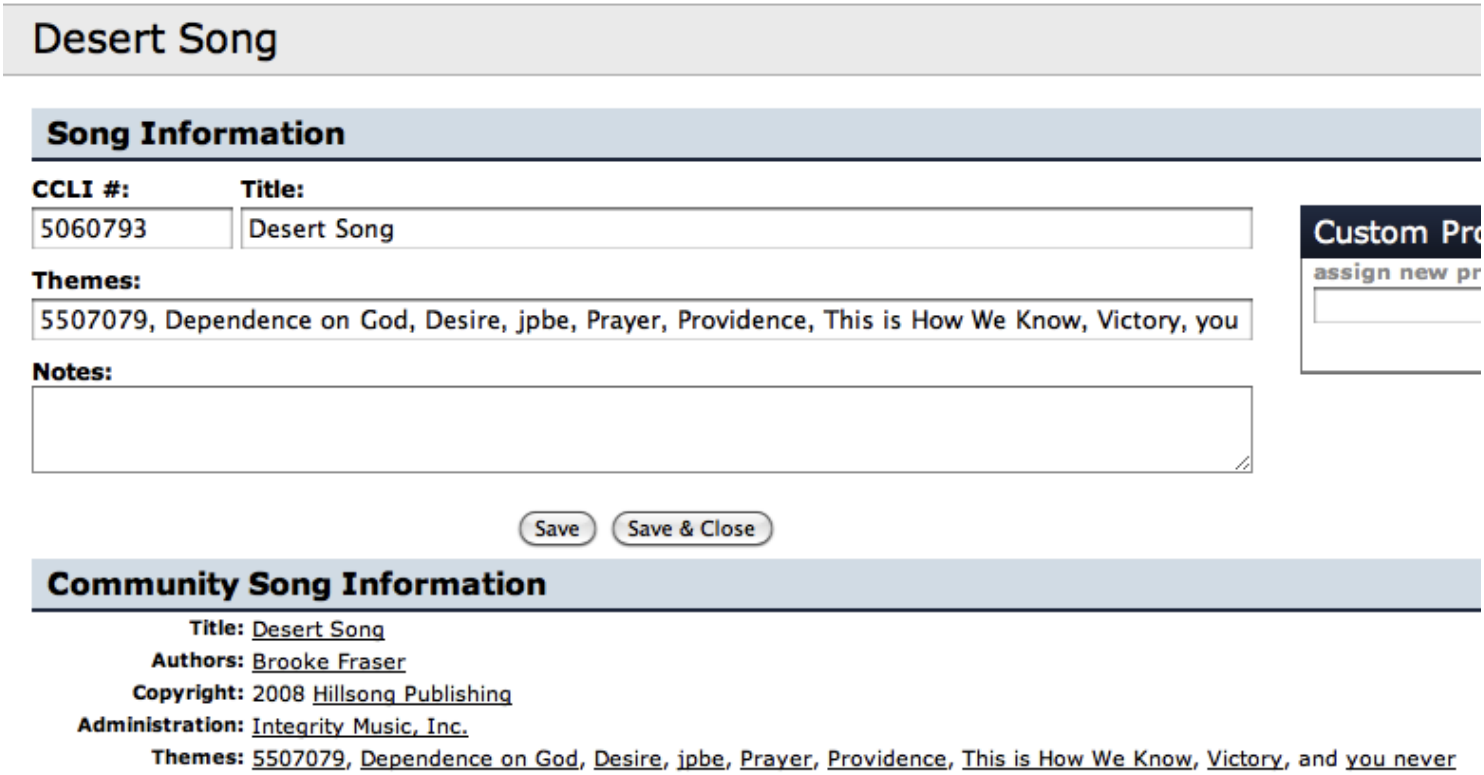
Enter CCLI number or Song Title



Select song from list

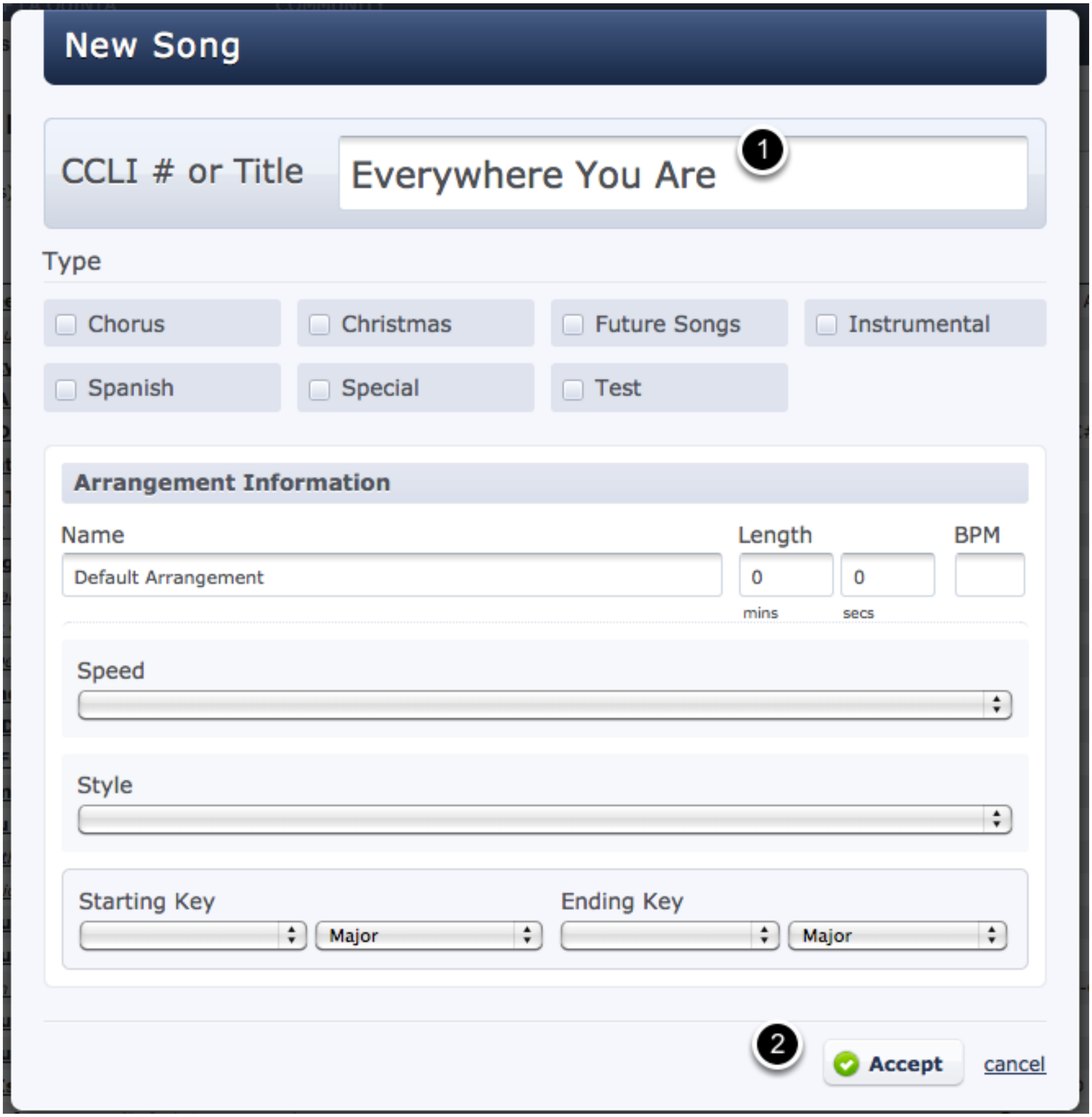
Find the song you are wanting to add and highlight it, as shown above. Once you click it, then fill out any details you may want (BPM, Speed, Style, etc.) and then hit accept.
If you do not see the song you wish to add, see directions below.

New song is added

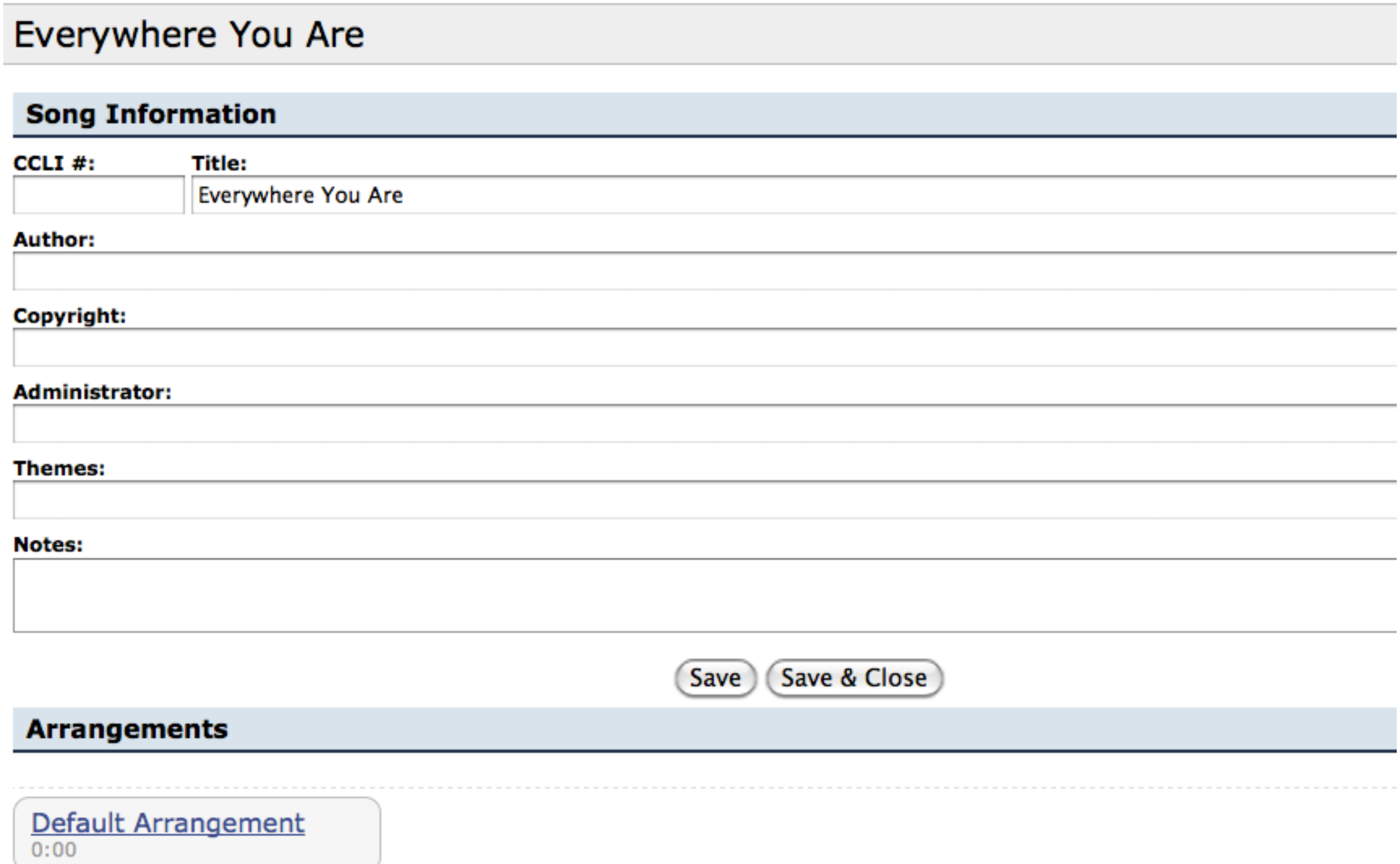


When you add a song, it will automatically bring all of the copyright information with it. There are no files that come with the song since we do not provide any content.

If the song you want to add is not a song on our list from CCLI, type in the title and click Accept.



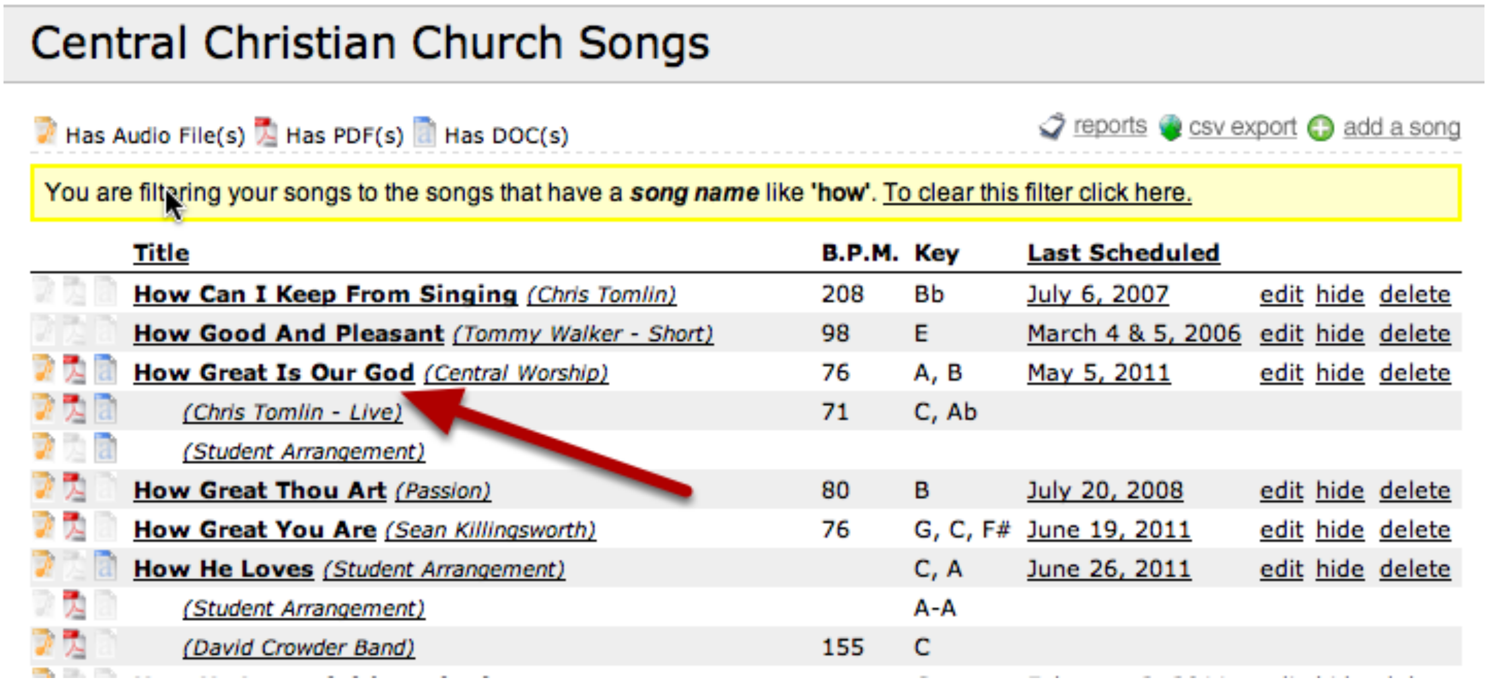
Song will be added. Add song information, then click Save and Close.



Adding Song Arrangements

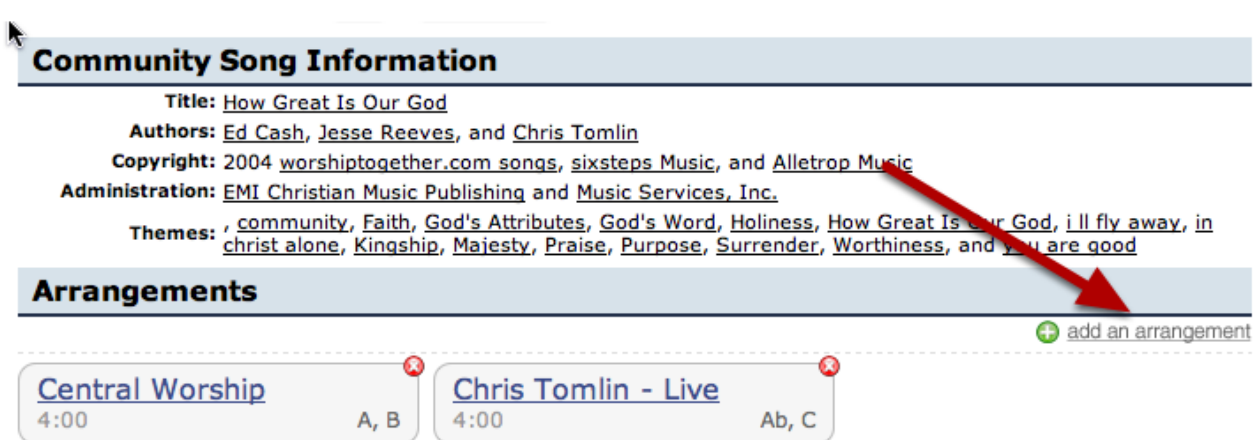
This lesson will show you how to create multiple arrangements for your songs. When you add a song arrangement to one of your plans, only the files attached to that arrangement are added. If different ministries in your church want use different versions of a song, you can create an arrangement for each ministry to keep their files separate.

On the Songs page, click on the name of the song.

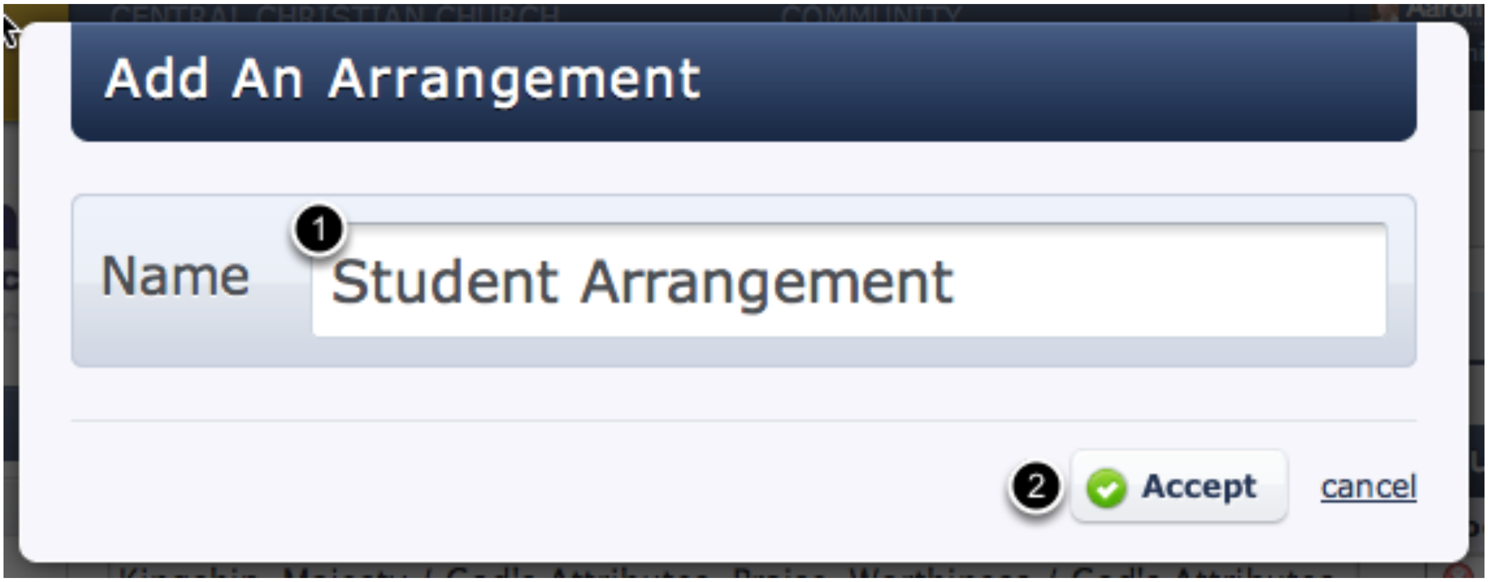


The song title is in bold and any arrangement titles are italicized in parenthesis. To create a new arrangement, click on the song title. (To edit an existing arrangement, you can click directly on the arrangement name to skipi to the arrangement page.)

Click on 'add an arrangement'.



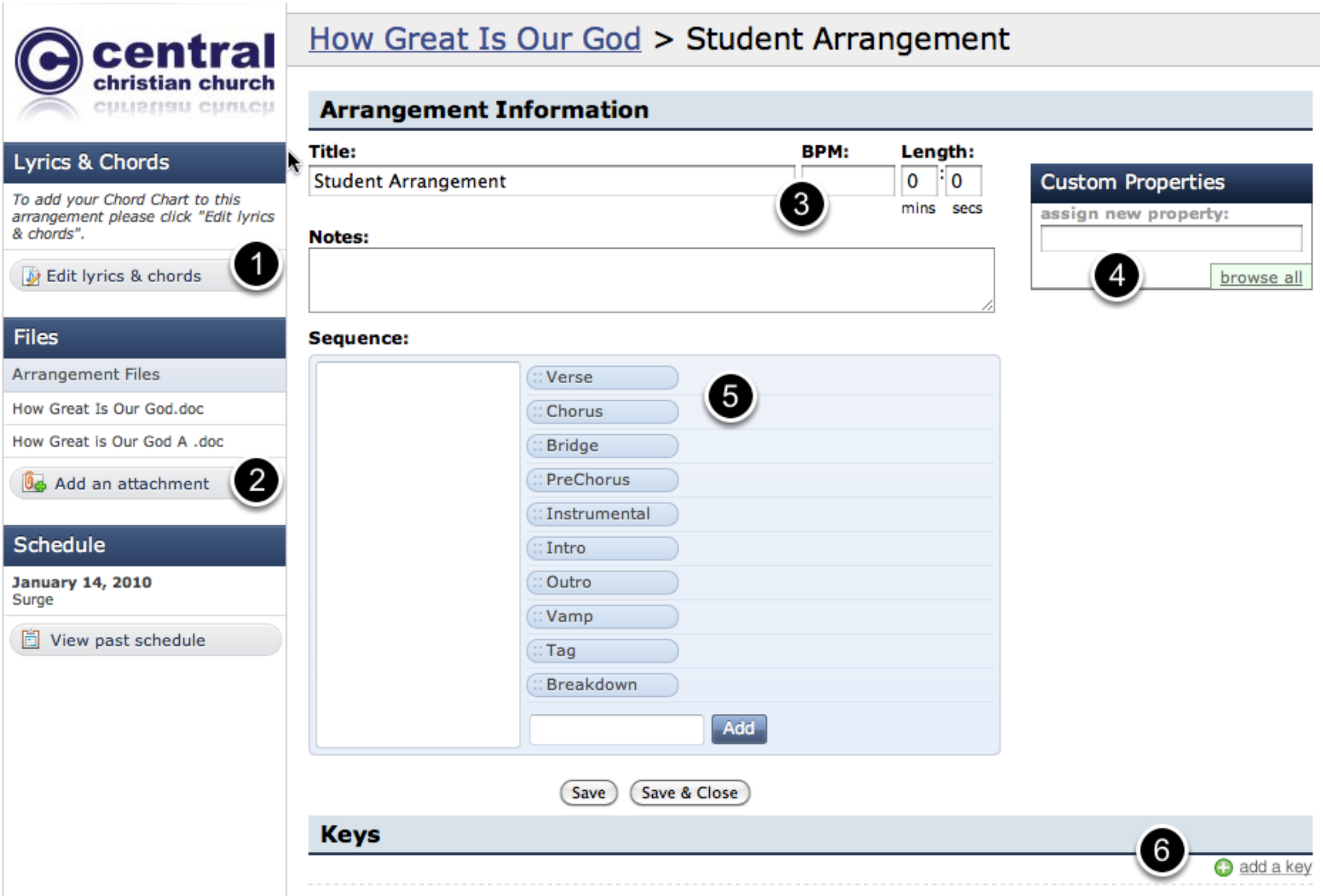
Title your Arrangement, click Accept.



Give your arrangement the most specific title possible, even if you only have one arrangement. If your arrangement is based off of an artist's recording, you might use the artist name or album title for the title of your arrangement. You can also title your arrangement based on the ministries or bands within your church.

Your new arrangement is created: click on it to edit.

Add files, notes, keys, custom properties, or edit information.



For this one arrangement, you can do the following:

1. Enter lyrics & chords for Planning Center to create PDFs which will be transposed to any key you add.
2. Add an attachment.
3. Edit Arrangement Title, BPM (beats per minute), Length, or Notes.
4. Add custom properties for this arrangement to tag the file and help you search and filter your songs.
5. Add a sequence to this arrangement.
6. Add a key to this arrangement.

Adding Keys to a Song Arrangement

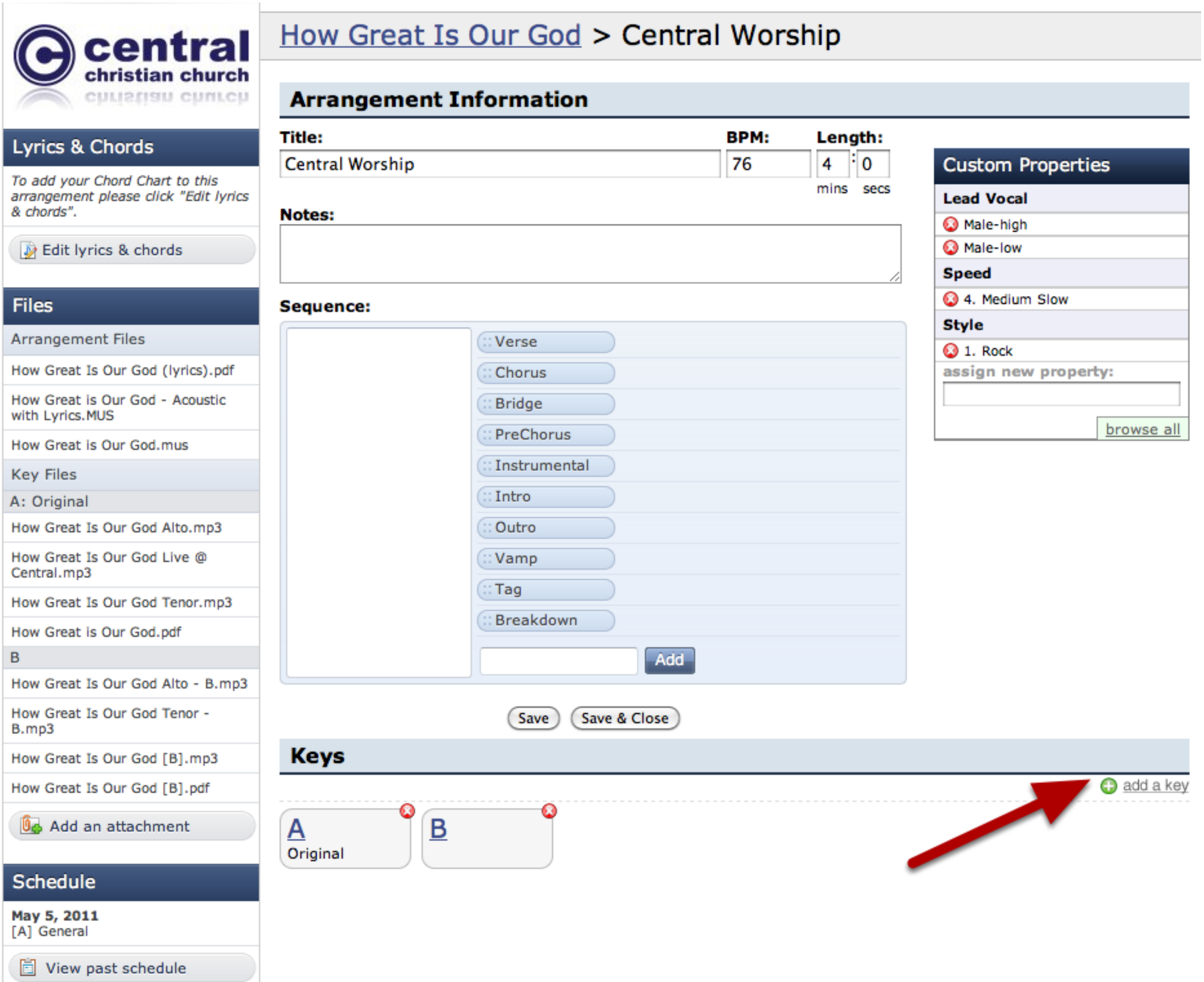
Learn how to add multiple keys to song arrangments so that when you do a song in a certain key, the files from other keys don't show up in your plan. Planning Center can also tranpose mp3s and Chord Charts your enter into the Lyrics & Chords box to any keys you add.

From Within a Plan, Click to go into a Song Arrangement

If you are in a plan, hover over the song and click the blue note icon to go directly to the song arrangement page.

You can also get to a song arrangement from the main Songs page by clicking on an arrangement name.

Click 'add a key'



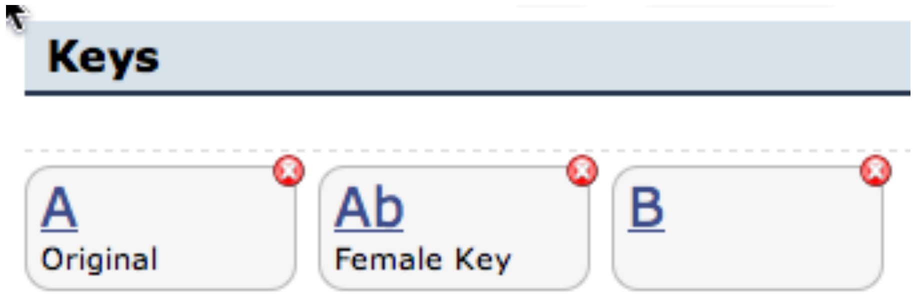
(You can edit existing keys by clicking on the key, and delete any key by clicking on the red x. Deleting a key will delete all file you've uploaded to that key.)

Choose your Key and enter any other information

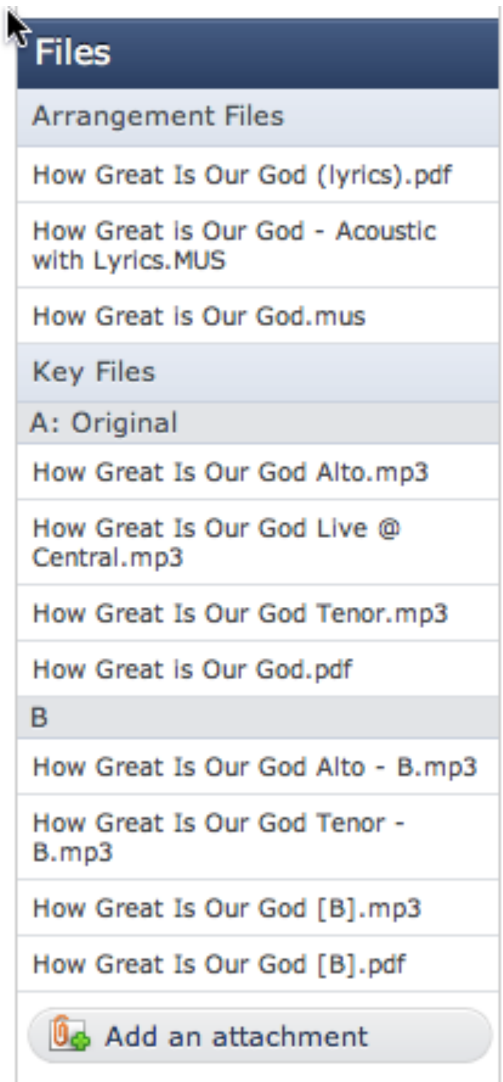
1. If your song starts in one key and ends in another, choose an ending key so you can see what key the song ends in when planning your services. If your song stays in the same key, leave the ending key blank.
2. If you want to differentiate your keys, enter a description. This can help you remember who uses which key, and what the original key is.
3. If you are using Planning Center's Lyrics & Chords feature you can enter any alternate keys that you want chord chart PDFs created for. My song key is in Ab, so I'm adding G as an alternate key for my Acoustic Guitar players and titling it Capo1. When I add this song in the key of Ab to an plan, Planning Center will add a PDF in Ab and also a PDF in G titled Capo1.

Click accept when you are done.

Key is Added



Attach Files to Specific Keys for Better Organization



When you attach a file, you can attach it to the song (not recommended), arrangement, or any key.

- Files you attach at the **Song** level will be availalbe for ALL arrangements and ALL Keys

- Files you attach to an **Arrangement** will be available for that specific arrangement and all keys within it. Lyric files should usually be attached to the arrangement since the lyrics won't change when you choose different keys.
- Files you attach to a **Key** will only be available for THAT arrangement and THAT key. It is usually best to attach chord charts directly to a key. Then when you add a song to a plan and choose a key, only the chord chart for that key will appear. If you upload audio files and plan on transposing them, attach those to the key. Otherwise, attach the audio file to the arrangement and the original audio file will be available for all keys.

Adding Attachments to Songs

This lesson will show you how to add attachments to your songs so the files or links are available when you add that song to a plan. You can upload a file from your computer, link to a file on the internet, or search and link to a song on iTunes or AmazonMp3.

Go to the Songs tab

Click on the song arrangement title

(You can also hover over any song in your plan and click the blue note icon to jump straight to a song arrangement page)

Click Add an Attachment

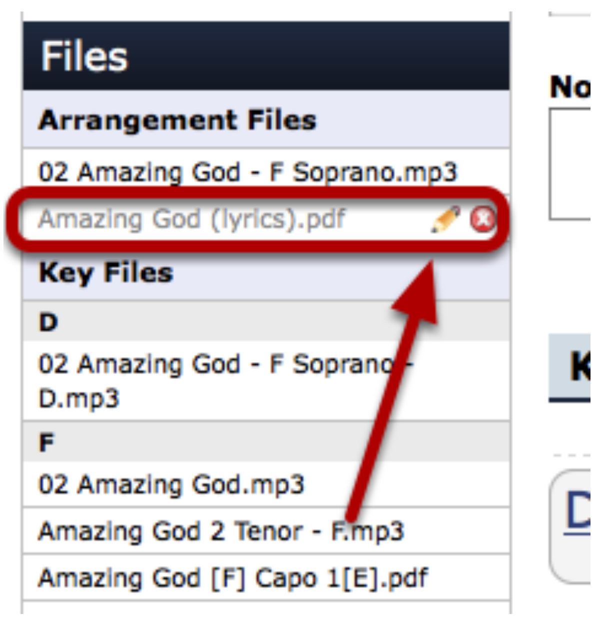
Learn the different methods for Adding Attachments here.

Moving files from one arrangement to another

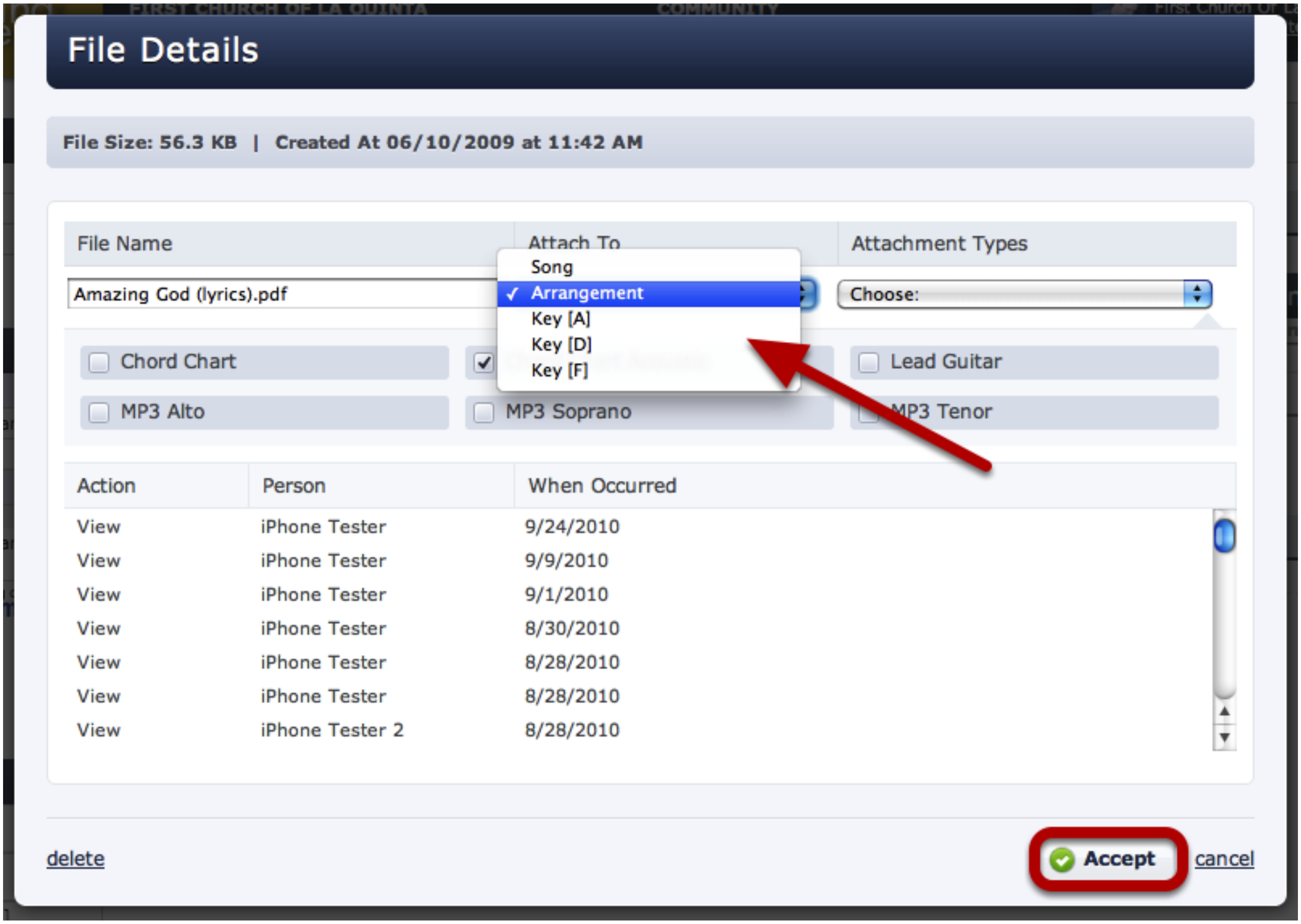
This lesson shows you how to move a file you've already uploaded from one arrangement or key to another.

Click on the song (or arrangement) title on the Songs page.

Hover over the attachment and click the pencil.



Choose where file should be attached to.

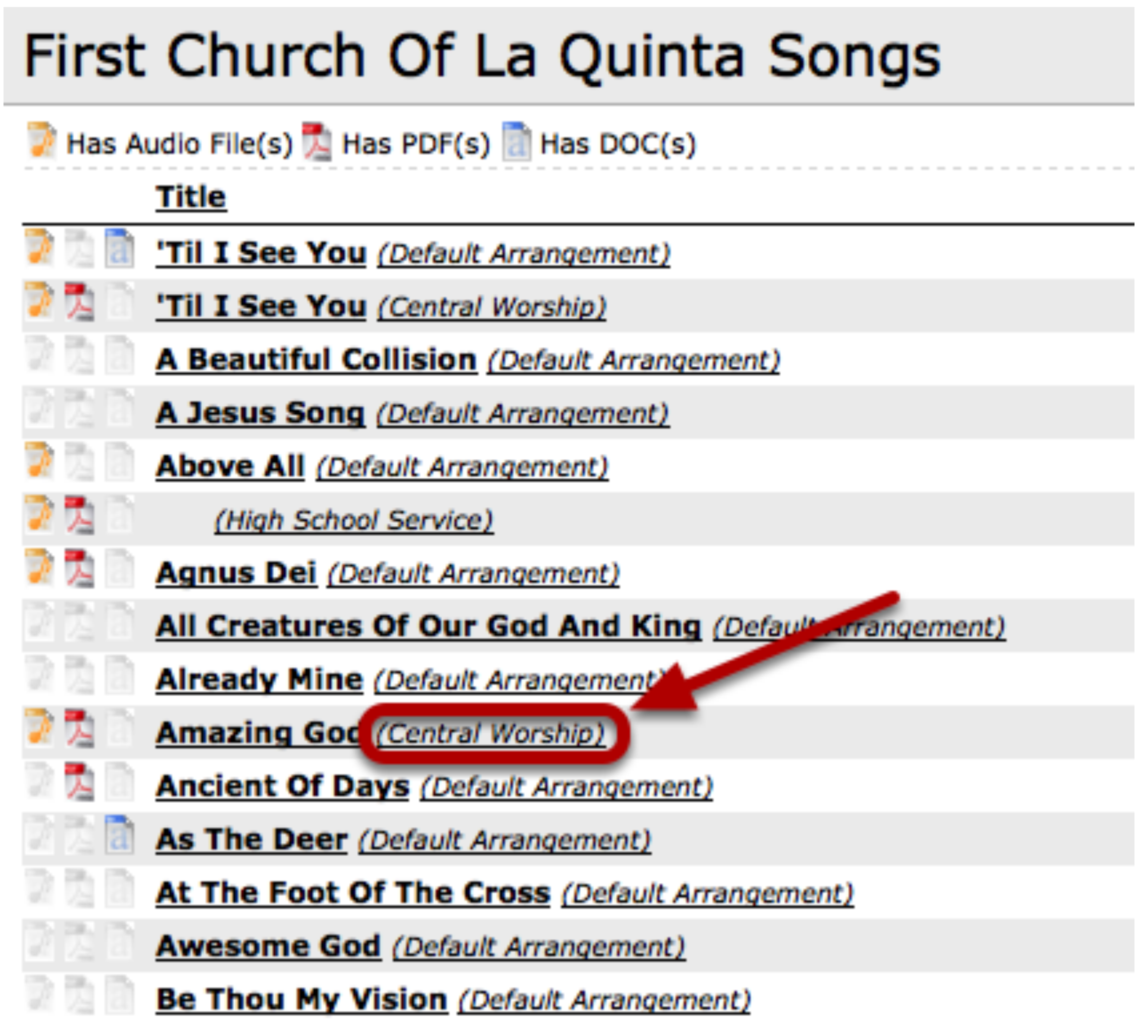


Click the blue drop-down arrows and select where you would like this attachment to be identified. You can have it attached to a specific key, an arrangement, or just to the song in general. Click accept when you are done and your attachment will be moved to where you'd like it.

Transposing an mp3

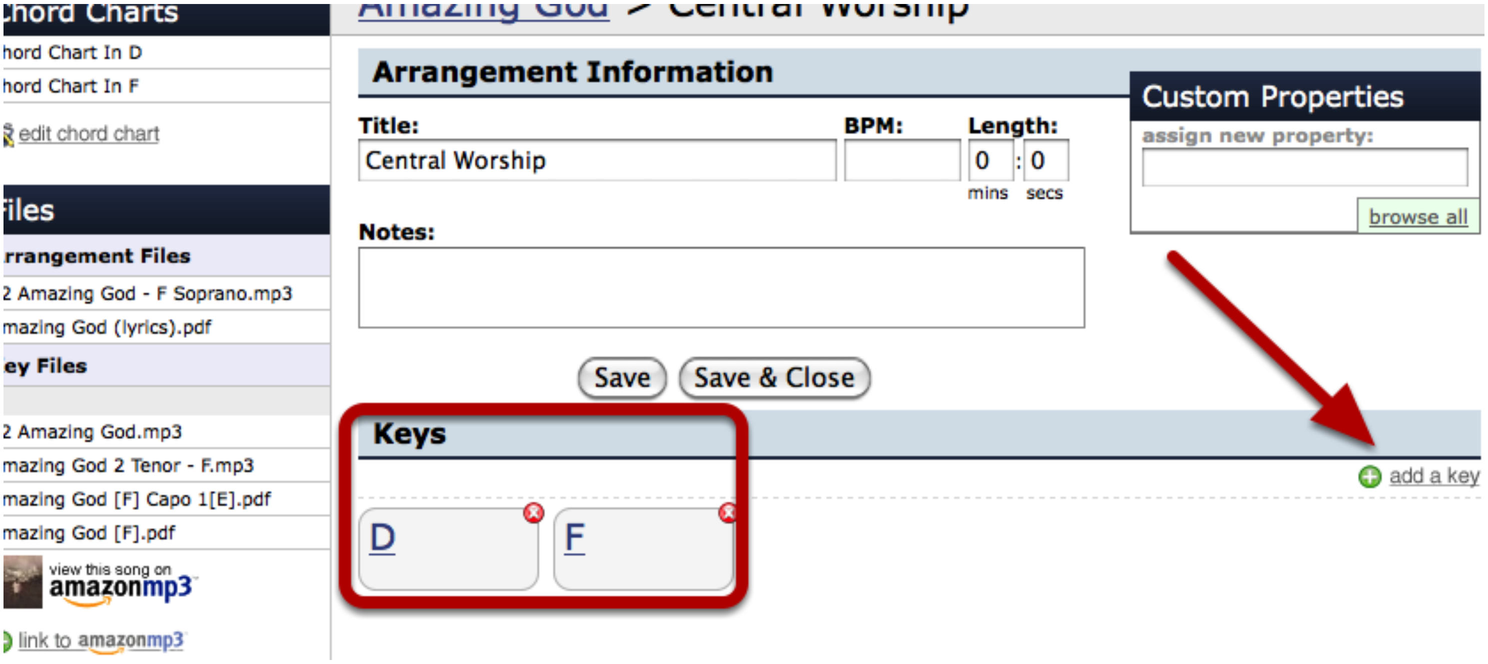
Click on the Songs tab

Click on the arrangement of the song you want to transpose



NOTE: It MUST be attached to an arrangement of the song. If you click on the song title on this page, you will then need to click on the arrangement at the bottom of the next page.

Add keys



Before you begin transposing, make sure that the key you want the song transposed to is added to your arrangements page. To add the key, click 'add a key' on the far right. Then you're all set up to transpose.

Hover over the mp3 you want to transpose and click the blue up/down icon.

If the audio file you've uploaded is not an mp3, our system will not be able to transpose it. m4a's will not work with our mp3 transposer. Also make sure that your mp3 is attached to an arrangement of your song. If it's just attached to the song in general, the system will not be able to transpose it.

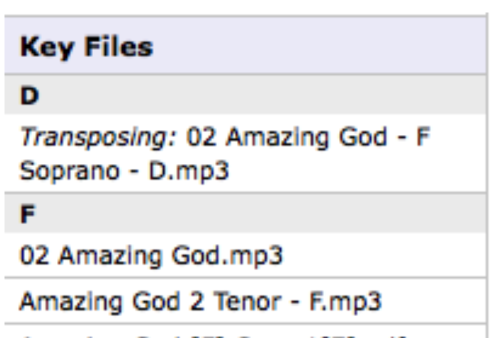
Enter keys, click accept.

Enter the original key the mp3 is in and what key you'd like it transposed to.

Just a note: The further away (more half steps) from the original key you go, the worse the mp3 will sound. So to ensure the final file sounds as good as possible, we always choose the least number of half steps. For example, going from E up to A is already 5 half steps which is definitely pushing the boundaries of the transposer (at least to sounds somewhat decent), but going from E down to A is 7 half steps which will make the final mp3 quite a bit worse quality. As a result and to keep things simple, we always choose the least number of half steps.

If you really need to go down instead of up, there are some other free resources you can search google for that will do this for you. You can transpose the file first, and then upload it to Planning Center. I would recommend the free cross-platform application, Audacity which you can get from http://audacity.sourceforge.net/ .

Song Transposing

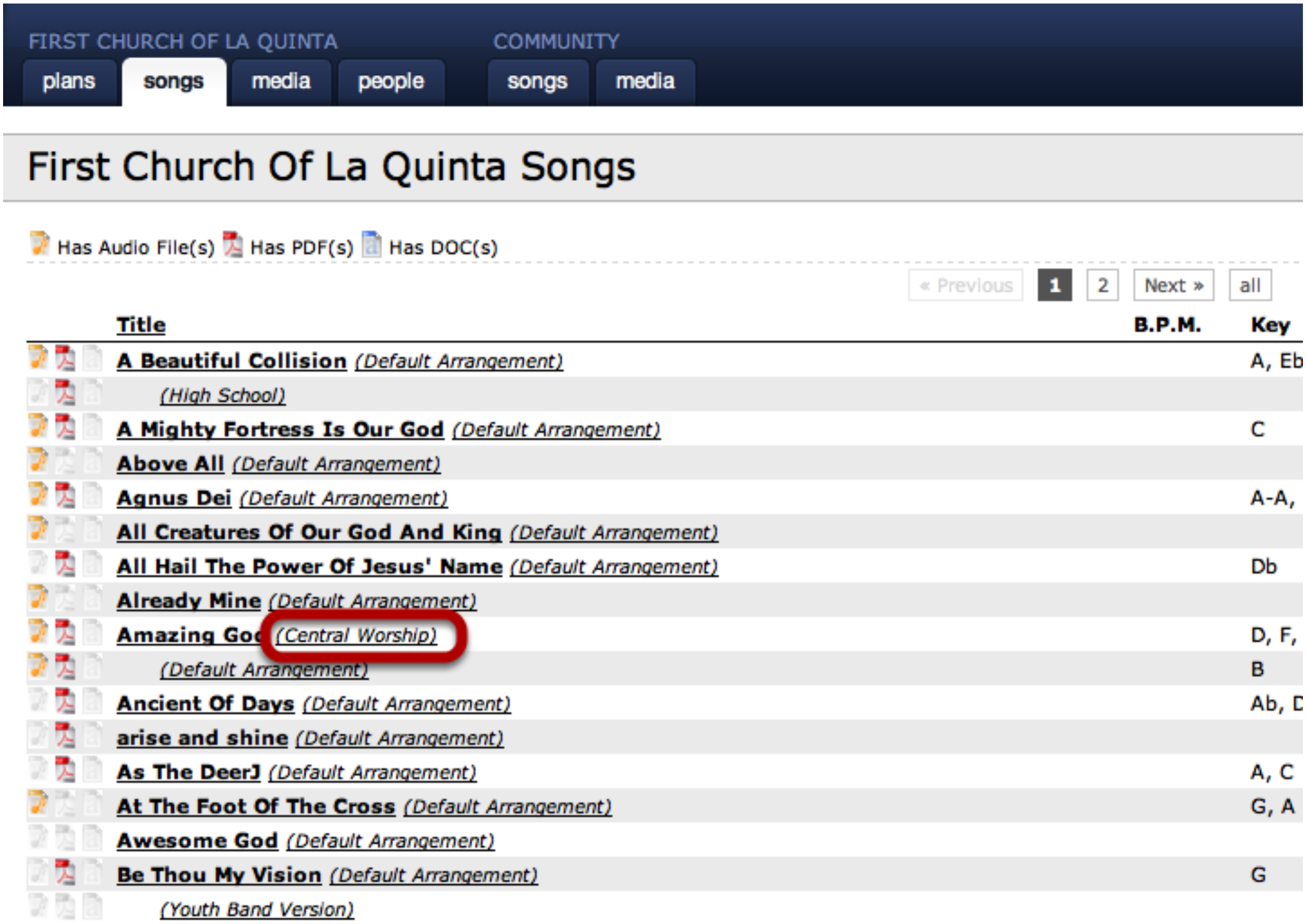


You will see the song says "Transposing" for a little while. If you've seen it saying this for more than 5 or 10 minutes, try holding down command (for Macs) or control (for PC's) on your keyboard, then clicking refresh on your browser. Your file will be transposed without affecting the pitch, and will be added to the Key Files section of your arrangement details page.

Transposing chord charts & Making Lyrics PDFs

This lesson shows you how to transpose a chord chart and deal with the "Edit Chord Chart" area of an arrangement of a song.

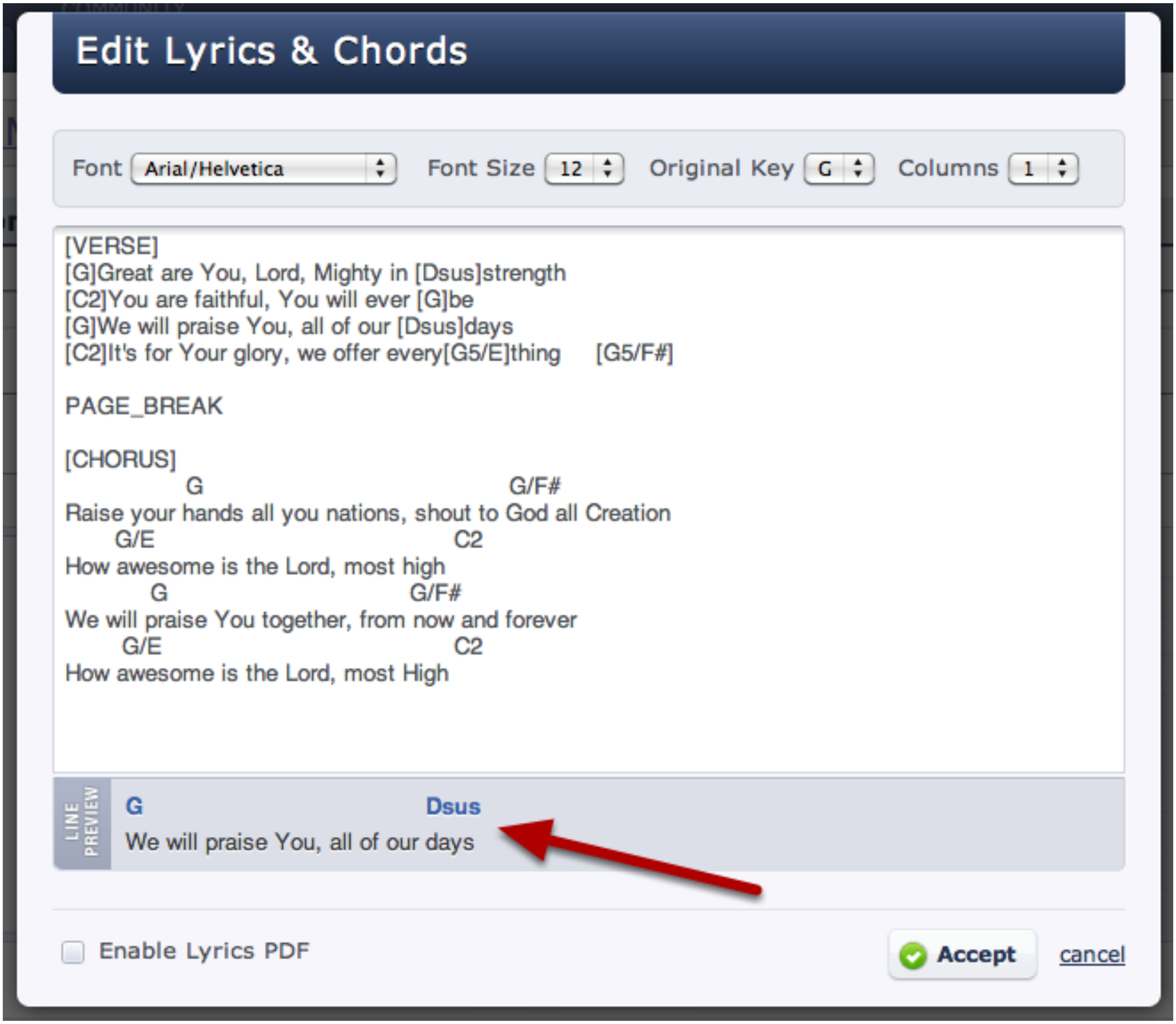
On the Songs page, click on an arrangement name



You can also click directly on a song name, but then you'll need to click on an arrangement name from there.

Click 'Edit lyrics & chords'

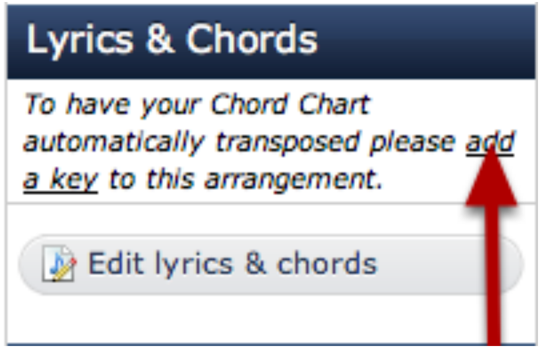
Copy/Paste your chord chart into the text box.



You can enter your chords inline with your lyrics by placing the chords in brackets as demonstrated in the verse. You can also place your chords on a separate line from the lyrics, like we did in the chorus. Either way, the line preview at the bottom shows you how your chord and lyrics will line up. Once you have everything looking how you'd like it, click accept.

To create a separate PDF with just the lyrics, click "Enable Lyrics PDF" in the lower left.

Add a key to transpose.



Once you've entered your chord chart, add a key and a new chart will automatically be created in that new key in a PDF format for you.

Add a key (different location of button).

You can also click on 'add a key' in the lower right corner if you want to add additional keys.

Enter key information

Enter the starting key you would like this chord chart to be transposed to. If the song ends in a different key, you can enter the ending key as well.

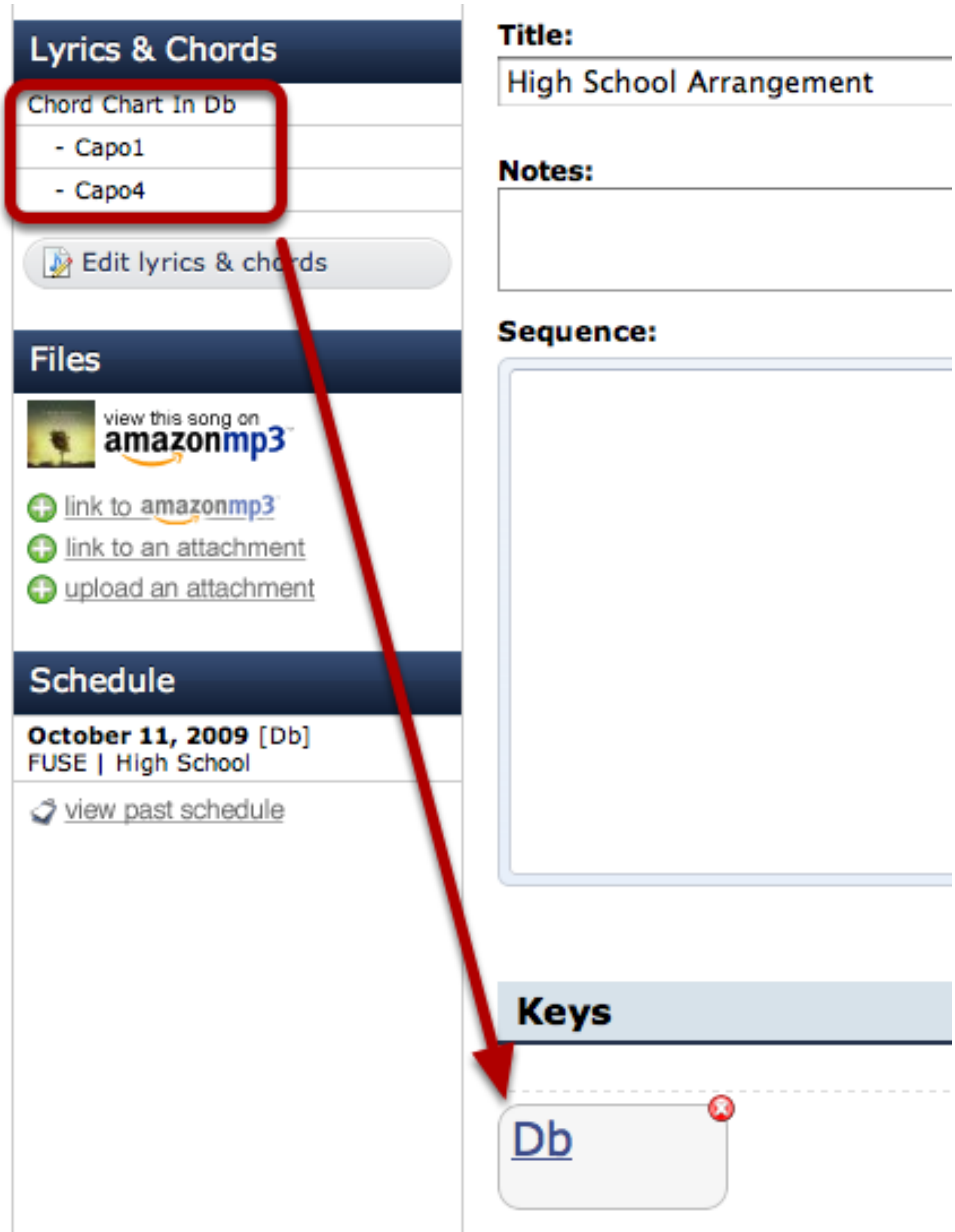
You can also add a description to this key (i.e. "Stacey's key" if someone sings in a higher or lower range).

Add a capo version of this chord chart by clicking 'add an alternate key'.

For Capos

After you click "add an alternate key", you will have to specify what that key is for. And choose they key that applies.
If the song is in Db and you want the guitars to have a chart in C to capo on the first fret, add an alternate key of C, label it Capo1, and Planning Center will include the C PDF when you use the key of Db.

Your Chord Chart is transposed.



In the top left corner is your new transposed PDF. Click on it to download. If you want that PDF deleted you will have to delete the whole key, shown at the bottom of this picture. Just click the red "x" in the top right corner of the key to delete it.

You can use the advanced Attachment Types feature to assign Planning Center Chord Chart PDFs, Capo PDFs, and Lyric PDFs to any of your customized attachment types.

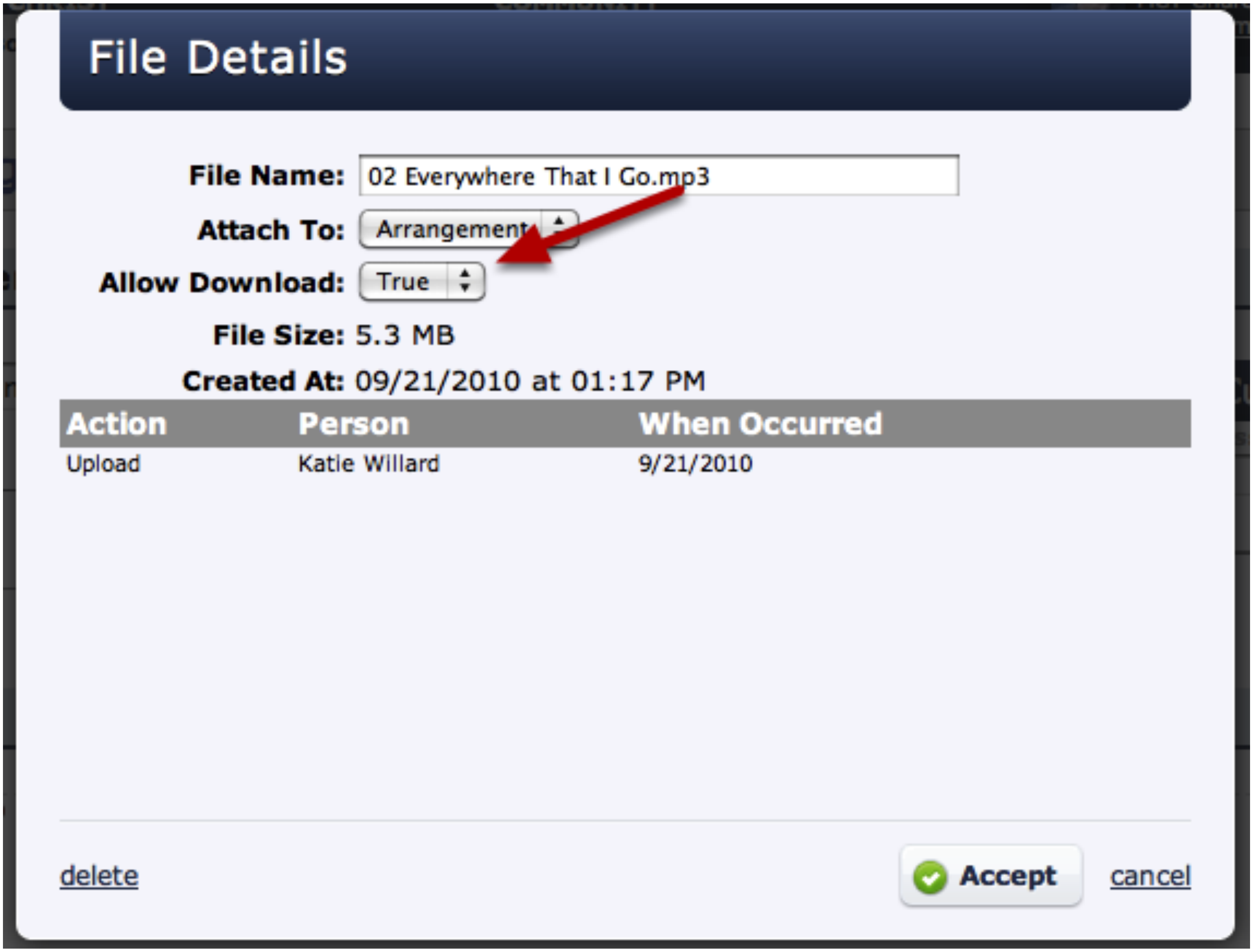
More Chord Chart Information:

BOLD & <i>Itallics</i> are the only things you can add to the chart to specify font.

You can also use PAGE_BREAK to start a new page.

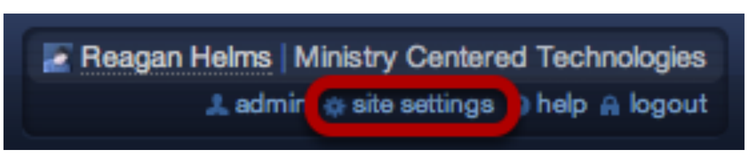
Enabling and Disabling Downloading of MP3s

Two Settings for MP3s:



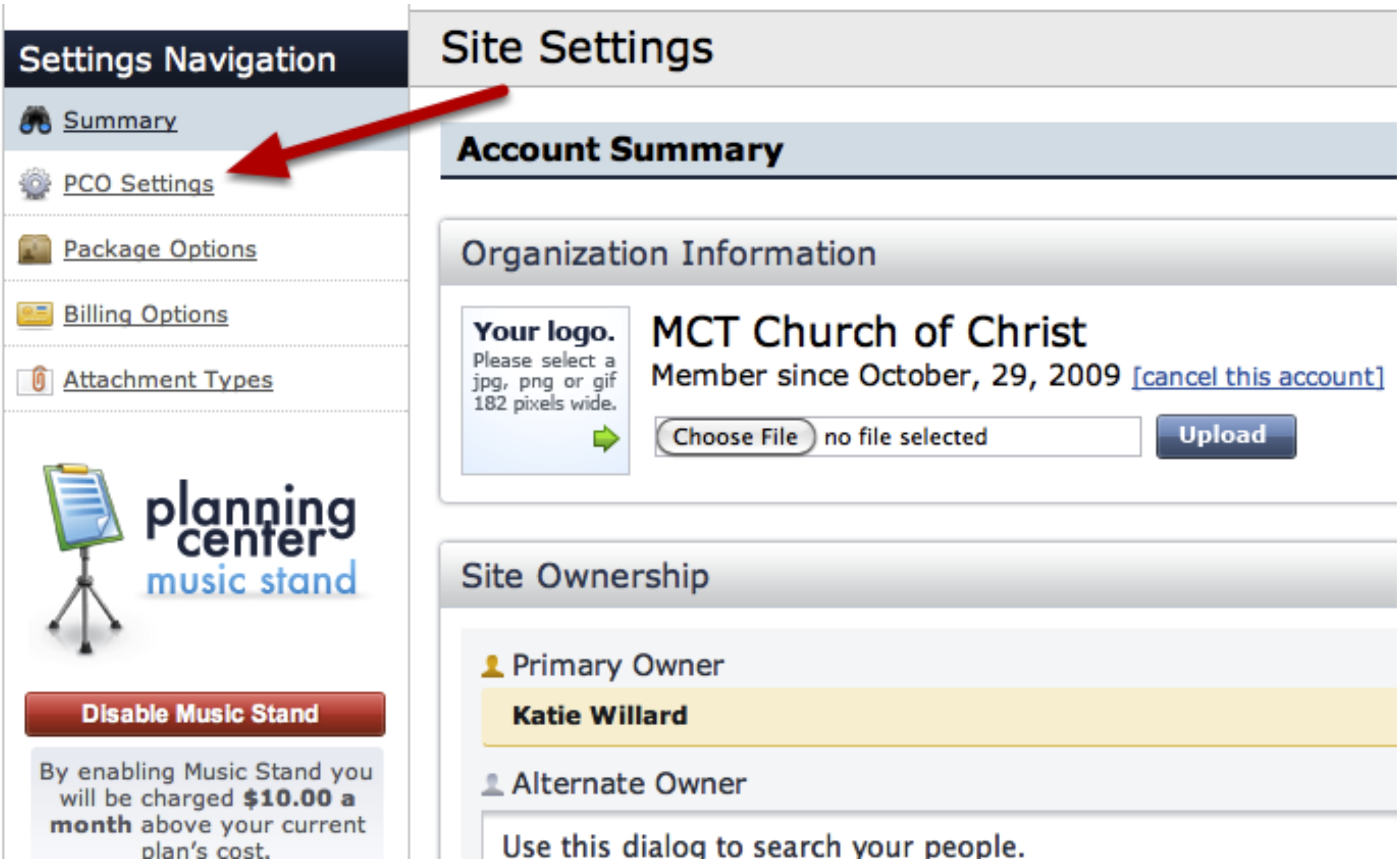
There are two settings for whether or not an mp3 can be downloaded. The first is in the Site Settings page. The second is shown above, and it's for each individual file you've uploaded.

To Change Global Setting, go to Site Settings page.

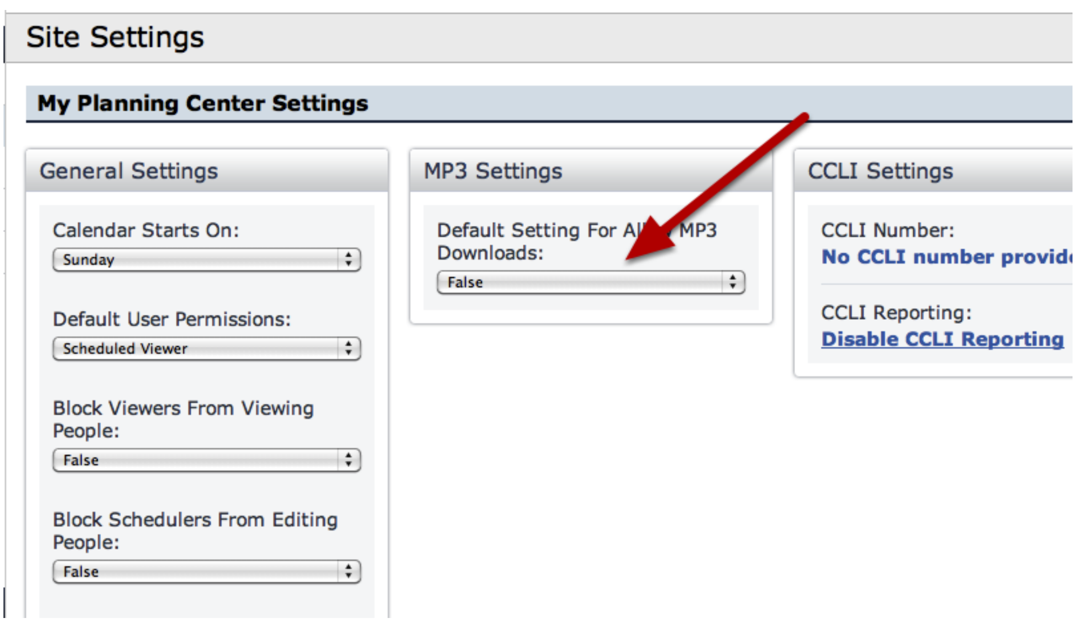


First, click on Site Settings. NOTE: Only the Primary or Secondary Account Administrators have access to this.

Click on "PCO Settings" on the left

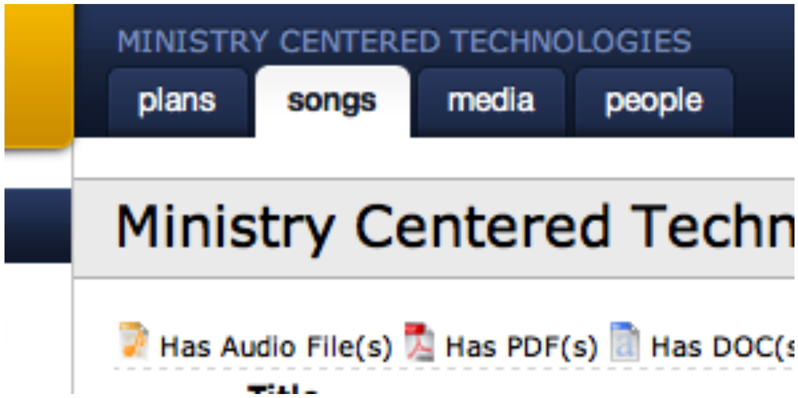


Then set MP3 setting.

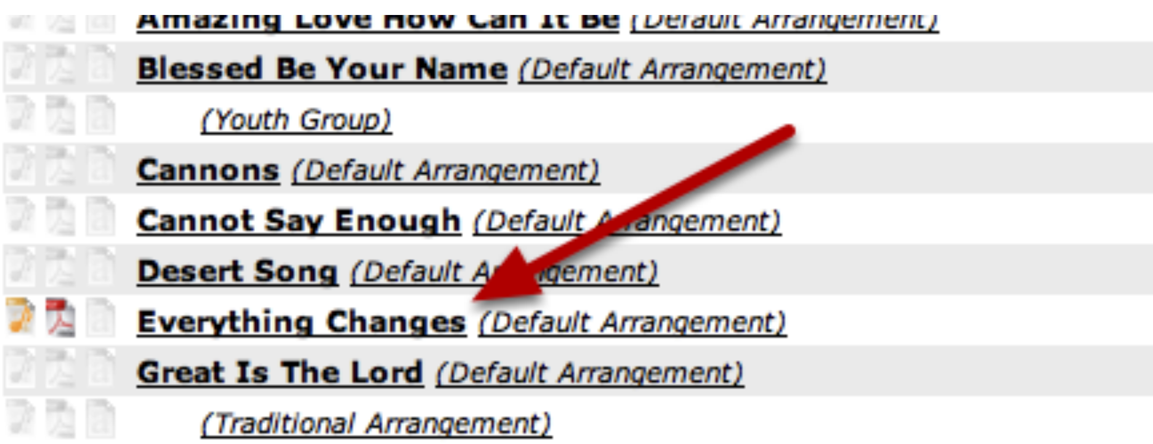


If your MP3 setting is set to True, that means this is allowing downloads. If it's set to false, that means it is not allowing downloads.

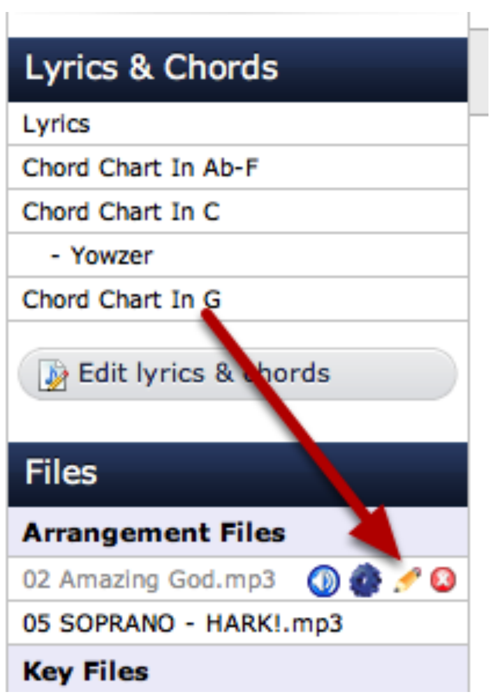
To Change Individual Setting, go to the Songs page.



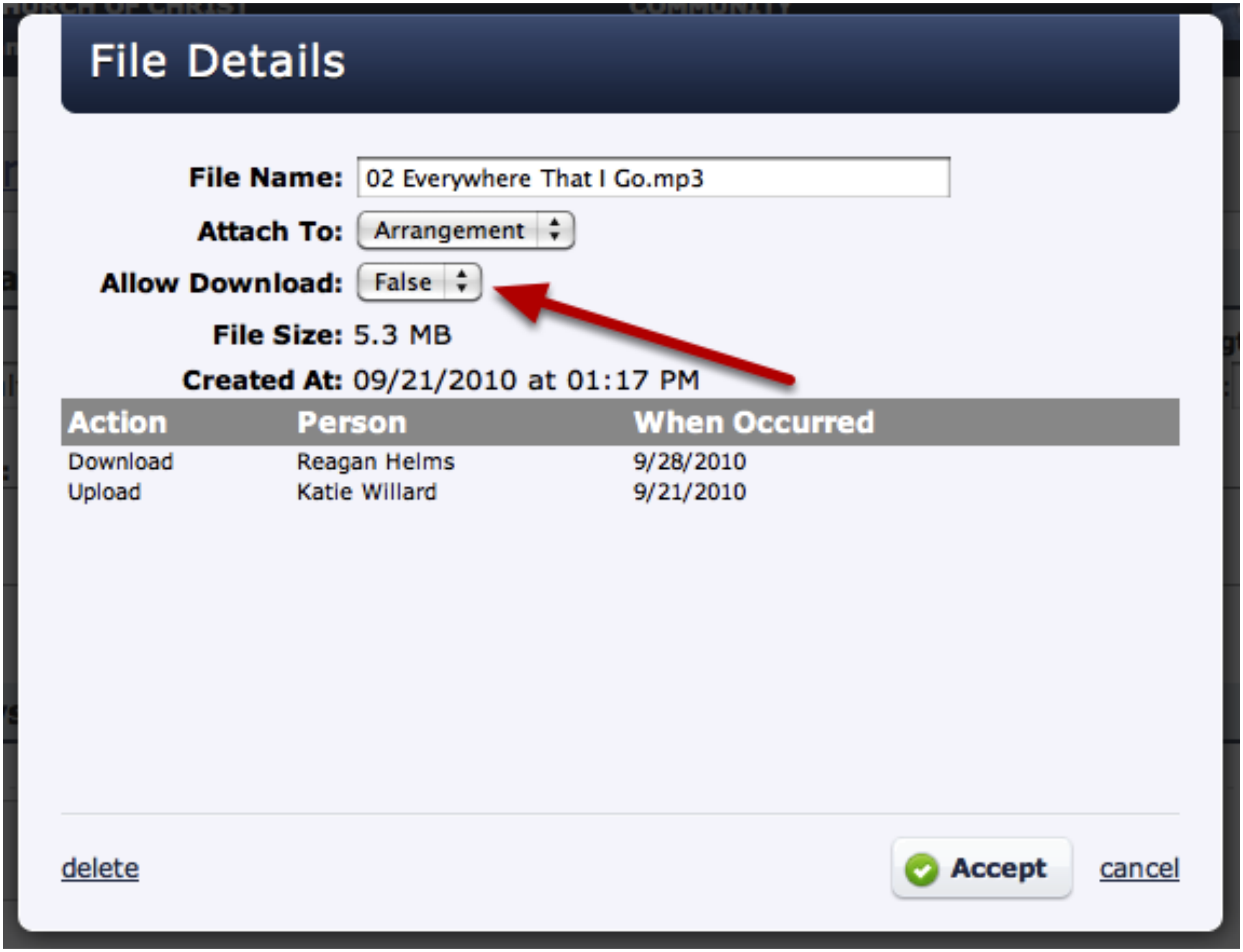
Click on the name of the song.



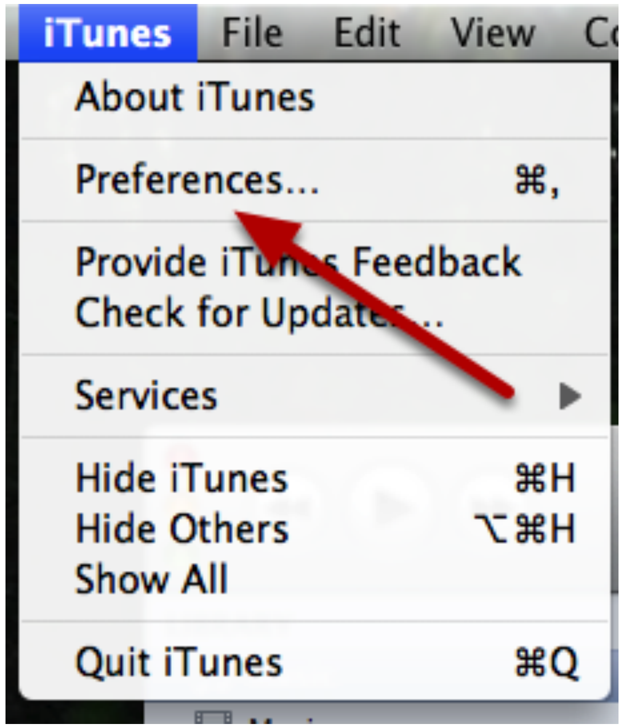
Hover over the mp3 file and click the pencil that appears.



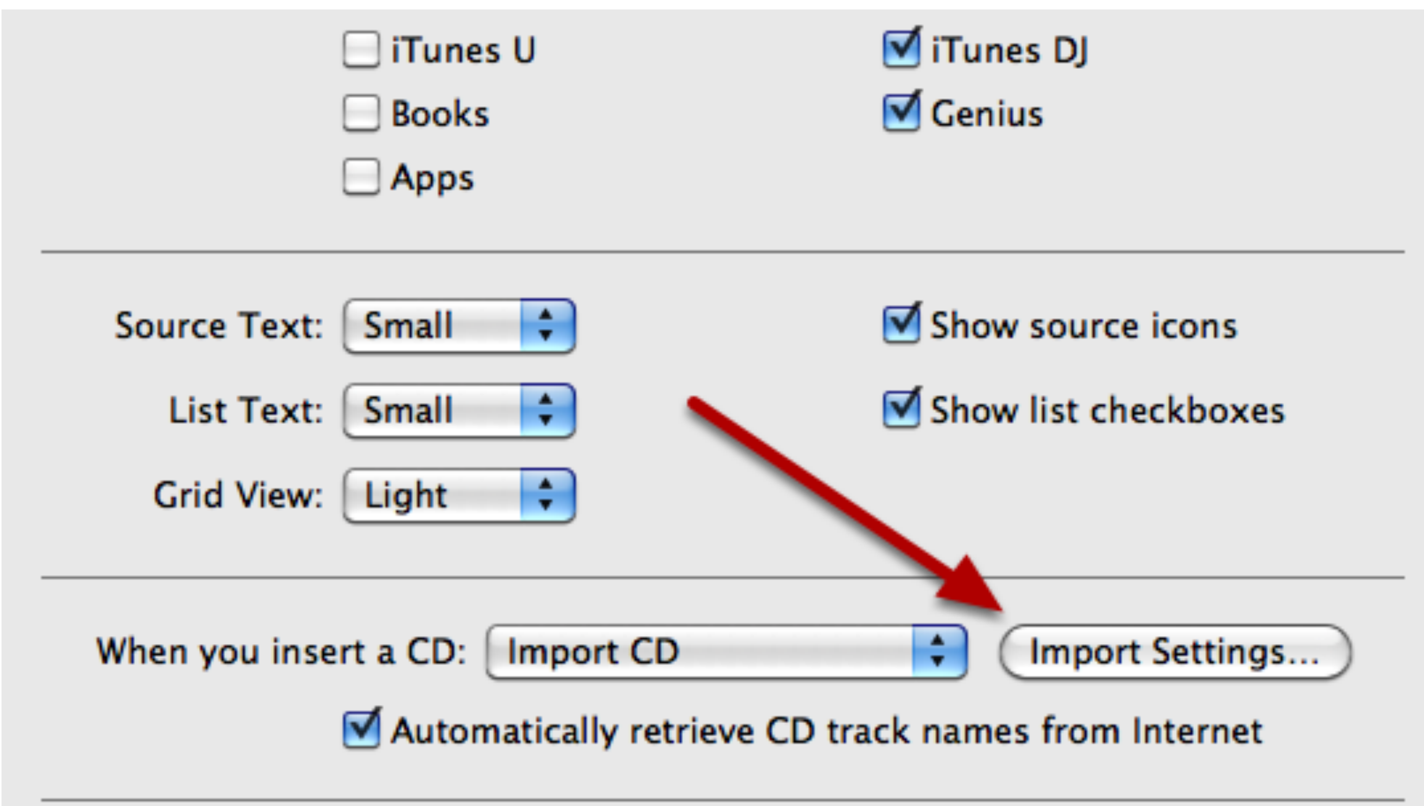
Set individual preference to True or False.



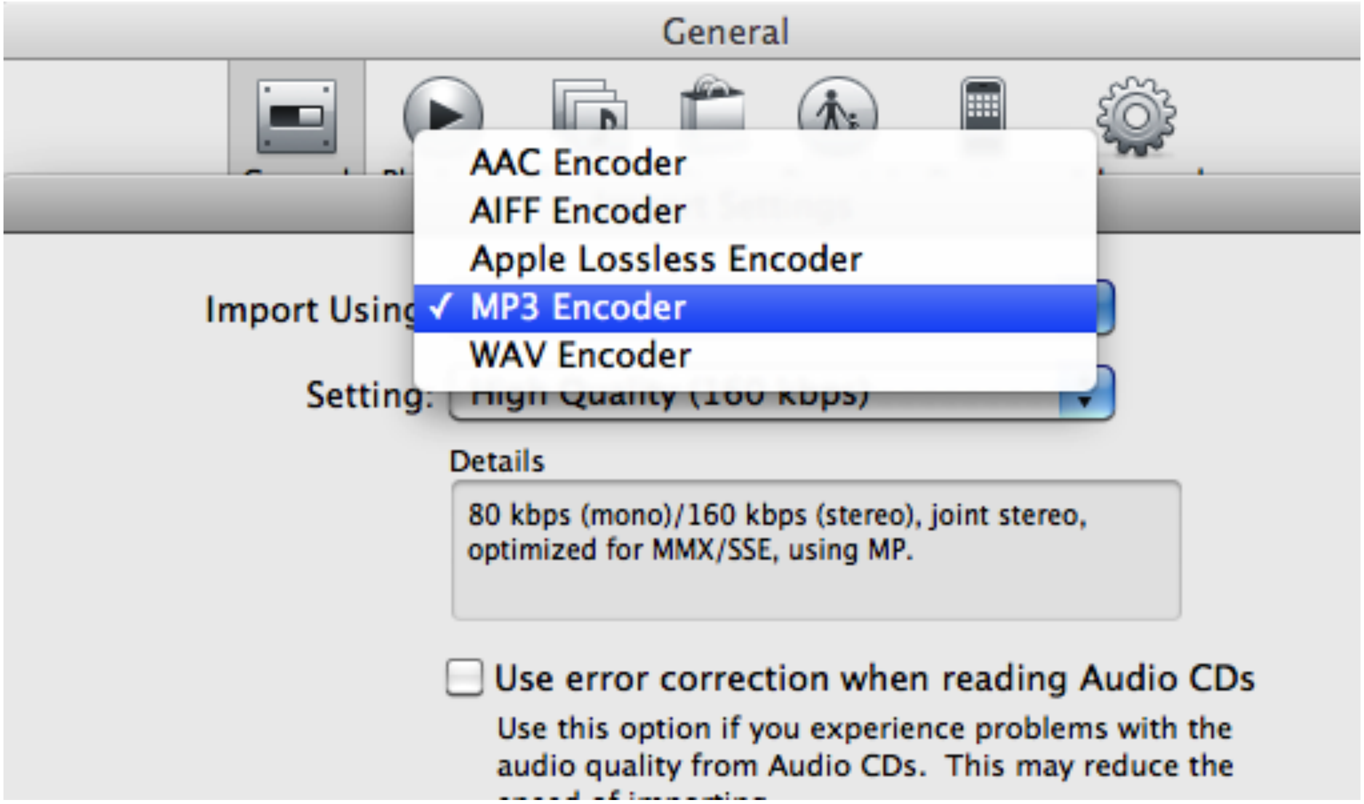
True will allow for downloads to be done with that mp3. False will not allow for downloads to be done with that mp3.



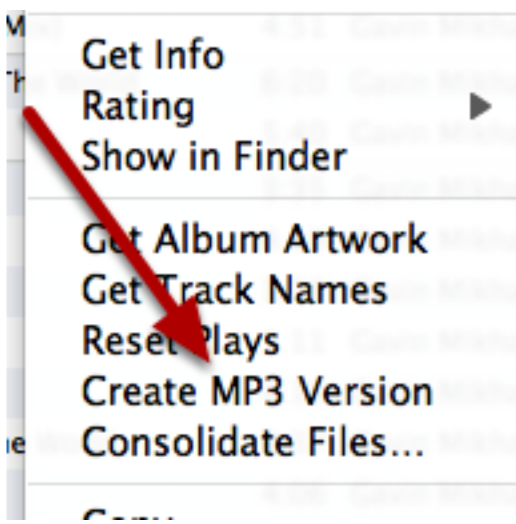
Go to "Preferences" under the iTunes menu



Then Click on "Import Settings"



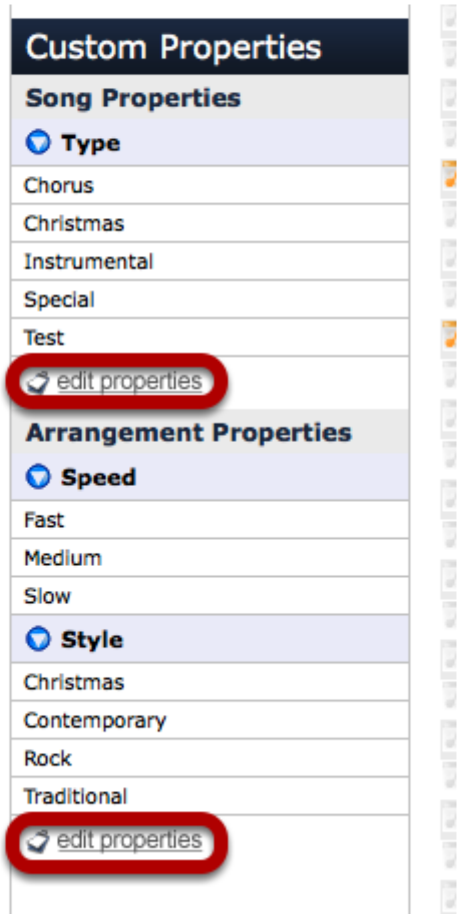
Select "MP3 Encoder", this will import all of your future files into an MP3 format, and give you the following option



Right click any of your existing songs, and select "Create MP3 Version"

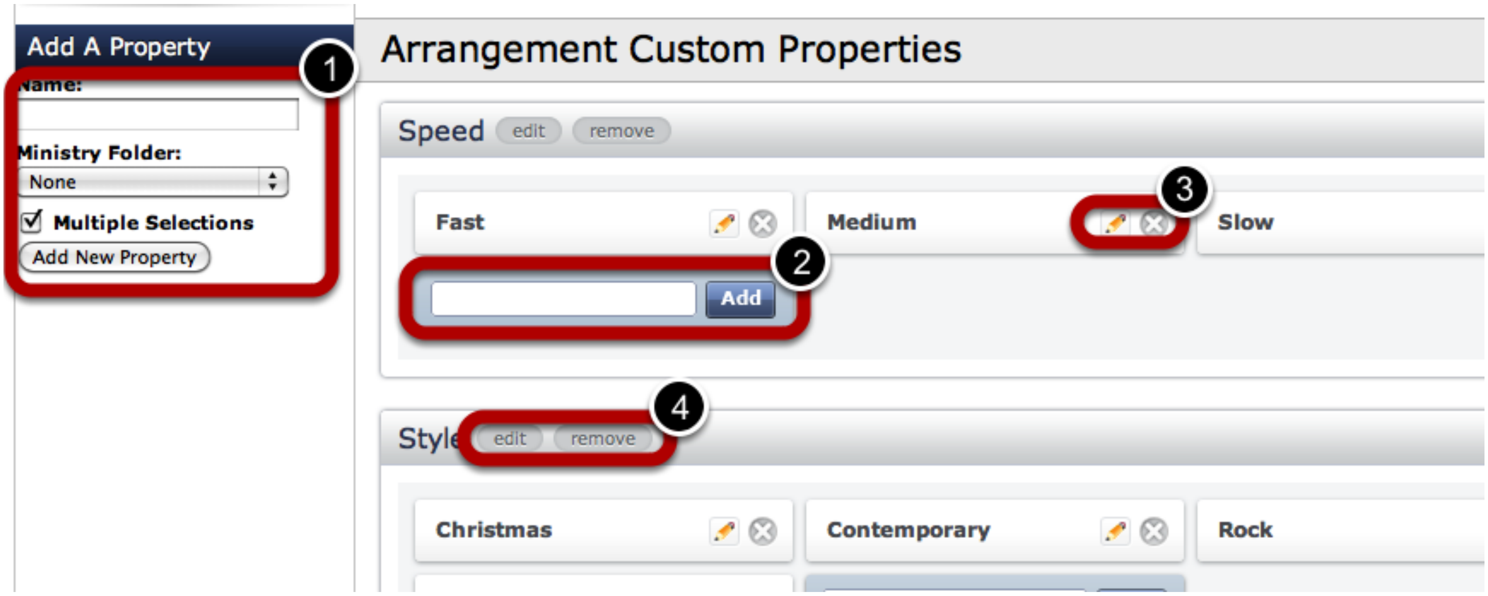
Song Custom Properties

Two types of Custom Properties for songs:



The songs page allows you to assign custom properties just like the People page does. However, on the Songs page there are two types of custom properties: Song Properties (dedicated just to the song) and Arrangement Properties (dedicated to any arrangement you may have attached to that song). To edit those properties (delete, add new, edit current ones), click 'edit properties' for either Song Properties, or Arrangement Properties.

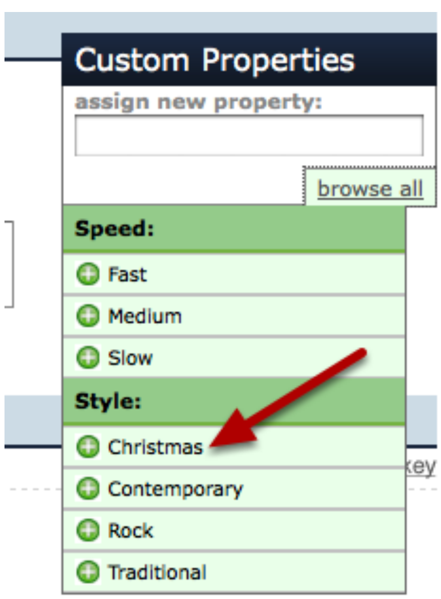
Add, Edit, or Delete Properties



On this page, you are able to add, edit, or delete any properties you need to.

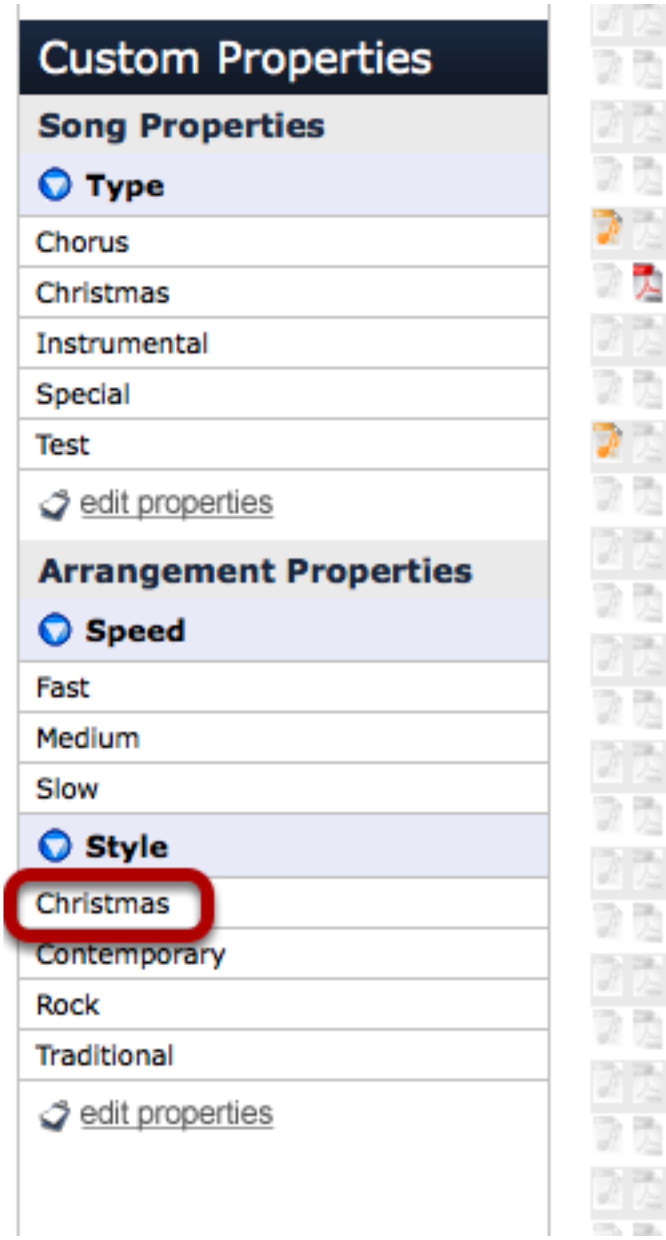
1- Add new Properties here. Type in the name, then click Add New Property.
2- Add new options here. Type in the name of your option and click Add.
3- Edit or delete current options.
4- Edit or Remove current properties.

Once properties are created, assign songs to properties.



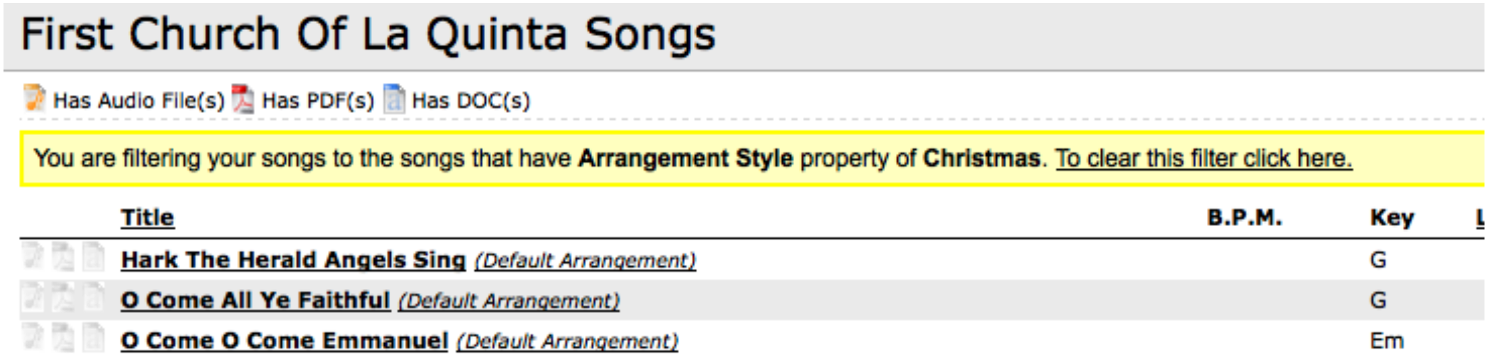
Keep in mind that if you are in the Song, you will only see Songs Properties. If you are in the Arrangement of the song, you will only see Arrangement Properties.
NOTE: make sure to click 'Save' or 'Save and Close' when you are done assigning properties.

Filter using custom properties.



Click the property that you'd like to see a list for.

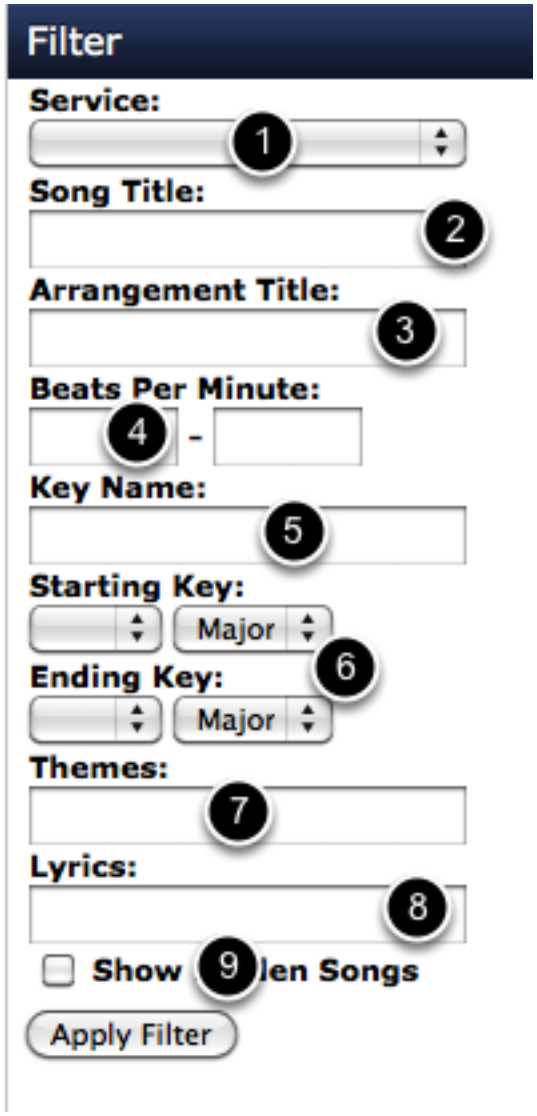
Your list is generated.



I now have a list of all the songs in my account that I had assigned the property "Christmas" (arrangement property).

Filtering on the Songs Page

Filtering Options on the Songs page:



There are several options of filtering on the Songs page:

1-Filter by Service. This will give you a list of songs that have ever been scheduled for that service.
2- Filter by Song Title. Type in one or more words of the song title and it will pull a list of all songs in your database with that word in it.
3- Filter by Arrangement Title. Type in one or more words of the arrangement title and it will pull up those songs with arrangements with like words.
4- Filter by BPM. If you want a list of all songs with a certain Beats Per Minute, just filter this way.
5- Filter by Key.
6- Filter by Starting/Ending Key.
7- Filter by Theme. Type in the theme and for any songs that you've tagged with that theme, it will pull up a list for you.

8- Filter by Lyrics
9- Filter by Hidden Songs. If you've hidden any songs (maybe they're Christmas or Easter), just check the box and click Apply Filter.

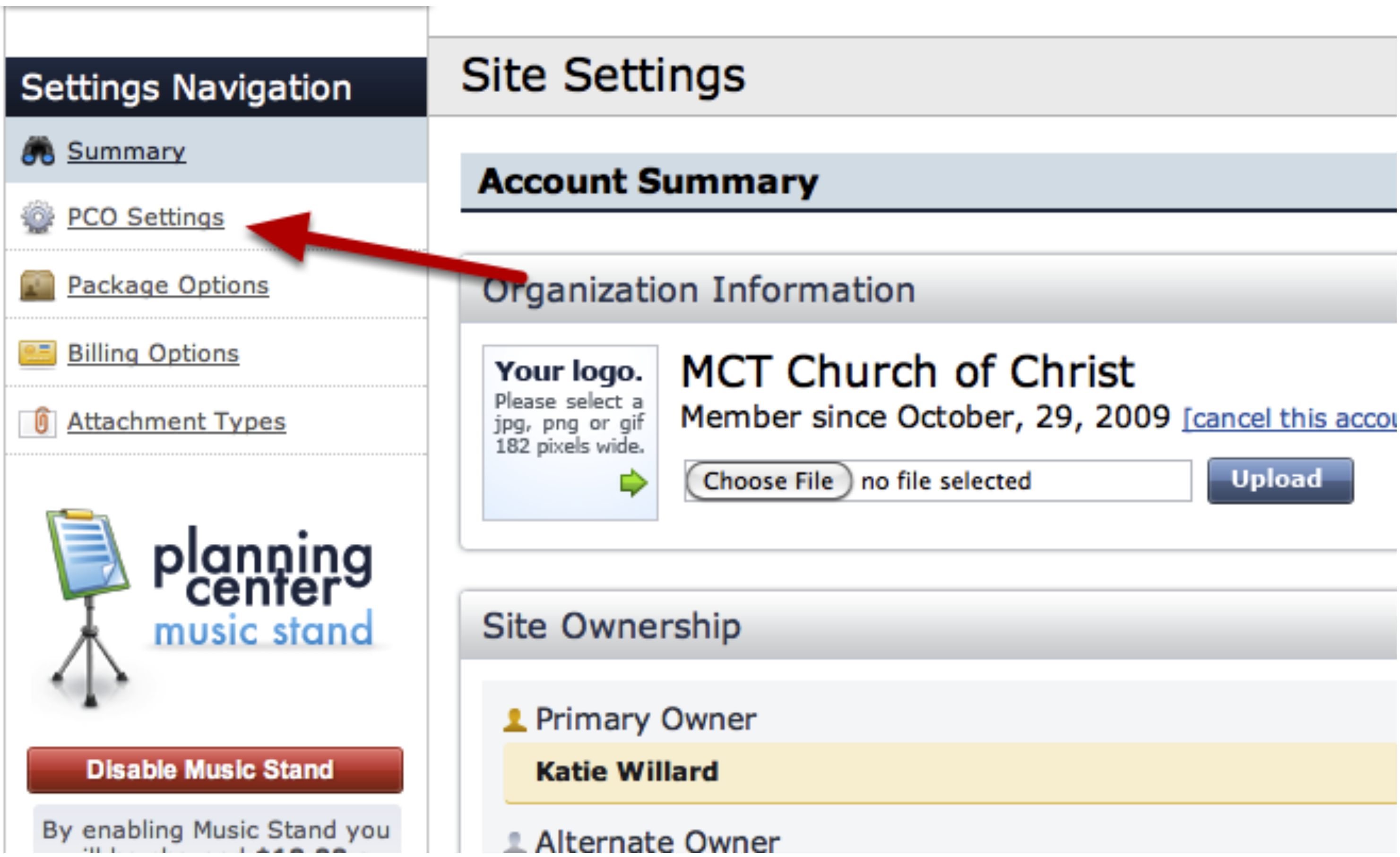
You can combine these filters. For instance, if I wanted to see any songs that are used in my Contemporary Service and that are in the key of E with the theme Forgiveness, I can use all 3 to get one list.

CCLI Reporting

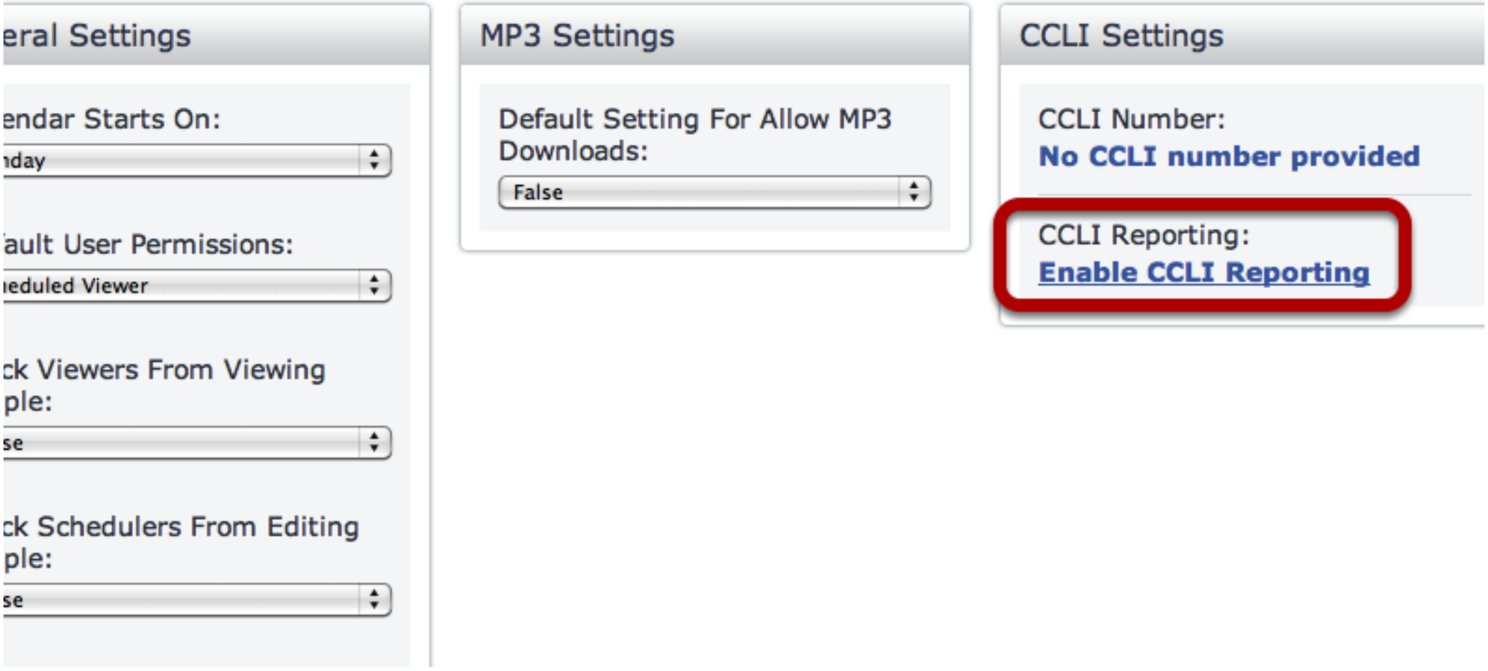
Go to Site Settings.

NOTE: Only the Primary or Secondary Account Administrators have access to Site Settings.

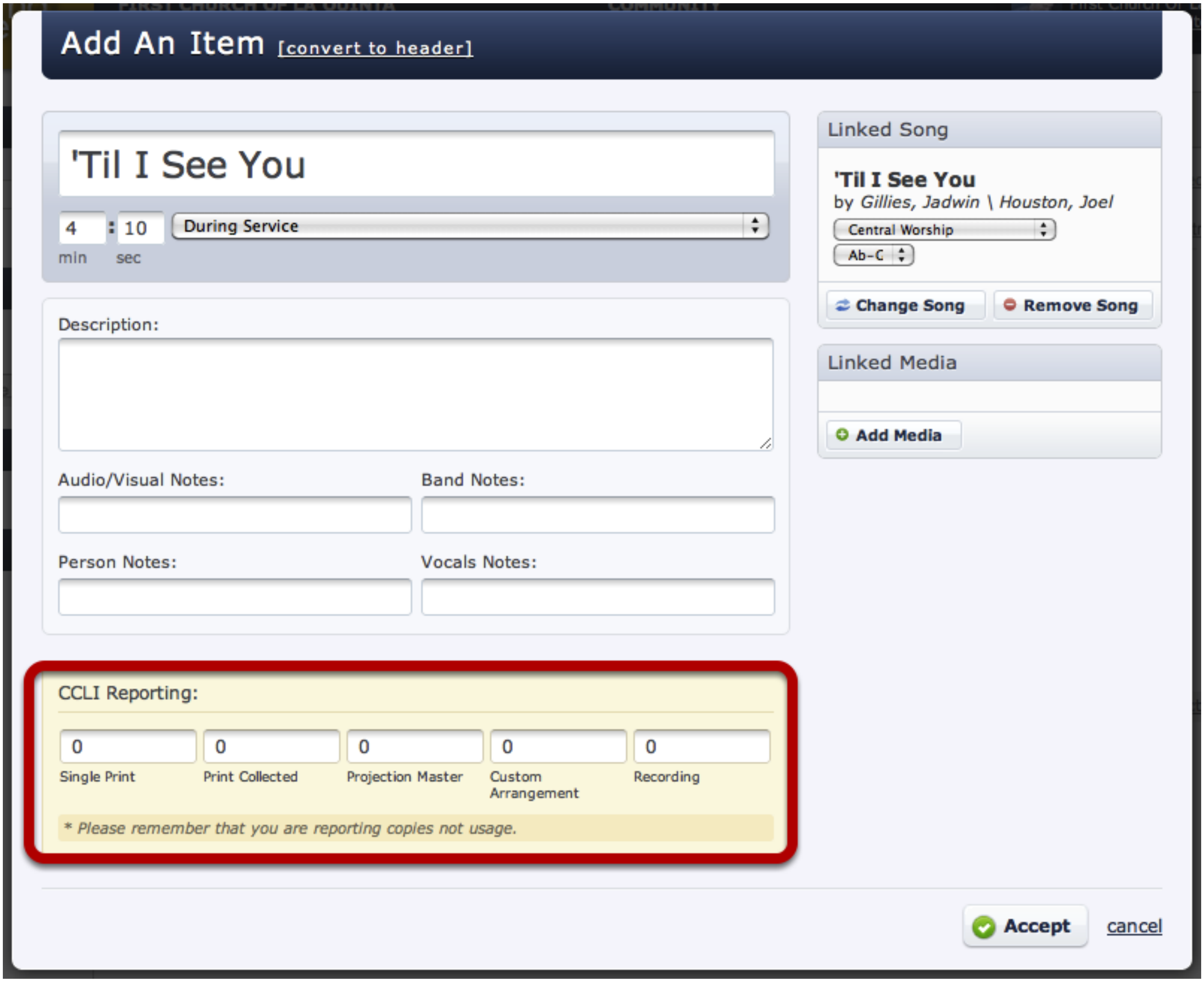
Click on 'PCO Settings' on the left



Click on 'Enable CCLI Reporting' on the right.

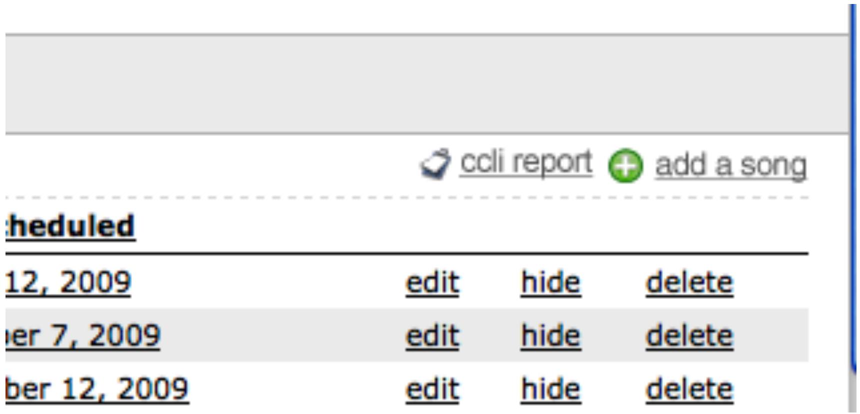


Now, when adding a song, options will appear.



When you are adding a song to your plan, you can now select which options the reporting will keep track of (contact CCLI for more information on this). Click accept and that song is added to that plan and kept track of until the end of your reporting period.

To get a report, go to the Songs page and click on CCLI Report.



This is found in the top right corner of the Songs page.

Enter the dates and service types you wish to see.

Here you can enter the dates and service types you want the report to pull up.

Report is Generated.

10/25/2009 to 12/2/2009 CCLI Report

Below you will find your CCLI Report for 10/25/2009 to 12/2/2009. You can use this to assist you in inputing your data into the CCLI Report web ap
make sure that this prints out with the alternating colors please make sure that when you click print you make sure "Print Background Colors" is ch

The activity reported is by number of people who either downloaded or streamed that song.

CCLI #	Song Name	Number Of Times Used In A Plan	Single Print	Print Collection	Projection Master	Custom Arrangement	Recorded	Streamed	MP3's
4455189	'Til I See You	1	0	0	0	0	0		1
	'Til I See You	0	0	0	0	0	0		
	A Jesus Song	0	0	0	0	0	0		
626713	Agnus Dei	1	0	0	0	0	0		
2690472	All Creatures Of Our God And King	4	0	0	0	0	0		
	Amazing God	4	0	0	0	0	0		2
5124055	Cannons	1	0	0	0	0	0		
3991651	Friend Of God	1	0	0	0	0	0		
1383	Glorify Thy Name	1	0	0	0	0	0		
3118757	God Of Wonders	1	0	0	0	0	0		
4989590	Great God	1	0	0	0	0	0		
18723	Great Is Thy Faithfulness	2	0	0	0	0	0		

Your report will be generated for the dates you indicated. NOTE: This does NOT directly report to CCLI. You will need to take this information and report it to CCLI.

Webinars

Webinar Schedule

This is a page designed to show you what webinars are coming up for the next month.

Webinars Available:

Introduction to Planning Center Online Webinars:
Wednesday, June 8, 2011 10:30 AM - 11:30 AM PDT: Click Here to Sign Up
Thursday, June 23, 2011 10:30 AM - 11:30 AM PDT: Click Here to Sign Up
Click here to see our recorded Introduction to PCO Webinar

Advanced Scheduling Webinars:
Wednesday, June 15, 2011 10:30 AM - 11:30 AM PDT: Click Here to Sign Up
Click here to see our recorded Advanced Scheduling Webinar