

PCO Manual

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](#).

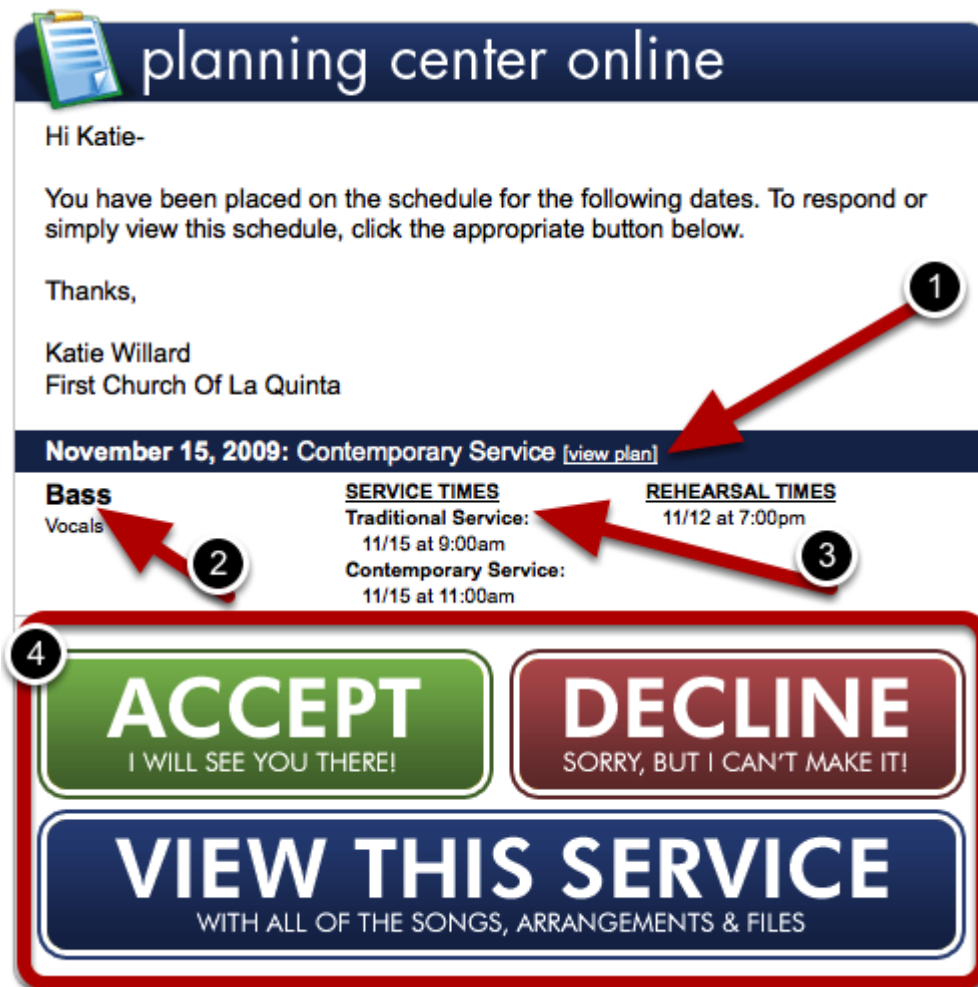
Service Details & Files

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:

Decline for November 15, 2009

We are sorry that you are unavailable to serve on November 15, 2009. To decline this date and inform Katie Willard, please fill in the note below and click "Decline & Send Reason".

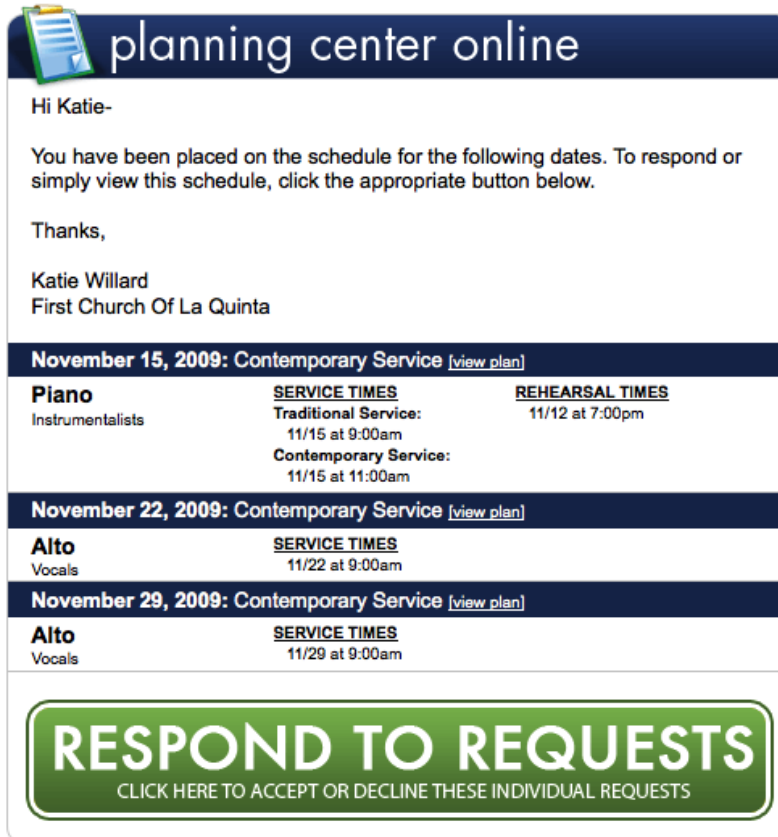
Reason: (Optional)


Decline & Send Reason

Cancel

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:



 **planning center online**

Hi Katie-

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

Thanks,

Katie Willard
First Church Of La Quinta

November 15, 2009: Contemporary Service [\[view plan\]](#)

Piano	SERVICE TIMES	REHEARSAL TIMES
Instrumentalists	Traditional Service: 11/15 at 9:00am Contemporary Service: 11/15 at 11:00am	11/12 at 7:00pm

November 22, 2009: Contemporary Service [\[view plan\]](#)

Alto	SERVICE TIMES
Vocals	11/22 at 9:00am

November 29, 2009: Contemporary Service [\[view plan\]](#)

Alto	SERVICE TIMES
Vocals	11/29 at 9:00am

RESPOND TO REQUESTS
CLICK HERE TO ACCEPT OR DECLINE THESE INDIVIDUAL REQUESTS

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.

Respond to Requests

Please make sure to click the "Send Responses" button at the bottom of the page when you are done.

Contemporary Service on November 15, 2009



Position: Piano (Instrumentalists)

Plan Times: 11/15 at 9:00a (Traditional Service), 11/15 at 11:00a (Contemporary Service)

Rehearsal Times: 11/12 at 7:00p



Contemporary Service on November 22, 2009



Position: Alto (Vocals)

Plan Times: 11/22 at 9:00a



Contemporary Service on November 29, 2009

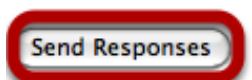


Position: Alto (Vocals)

Plan Times: 11/29 at 9:00a



Reason:



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

The screenshot shows the 'My Schedule' page with four numbered callouts:

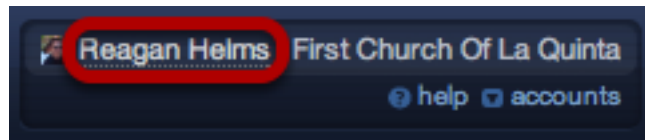
- 1** Pending Requests: A request for July 29 at East Valley Campus for Bass Guitar (Band 11AM) with 'accept' and 'decline' buttons.
- 2** Upcoming Dates: A block-out period from July 01 to July 05 for Summer Vacation.
- 3** My Calendar: A calendar for July 2011 with color-coded dates (green for confirmed, yellow for pending, red for declined/blocked out).
- 4** My Times: A list of scheduled times including Friday, July 22 (11:00 AM Second Service East Valley Campus), Friday, July 29 (11:00 AM Second Service East Valley Campus), and Monday, September 12 (09:00 AM Traditional Service La Quinta/Main Campus).

- 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 reschedule 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.

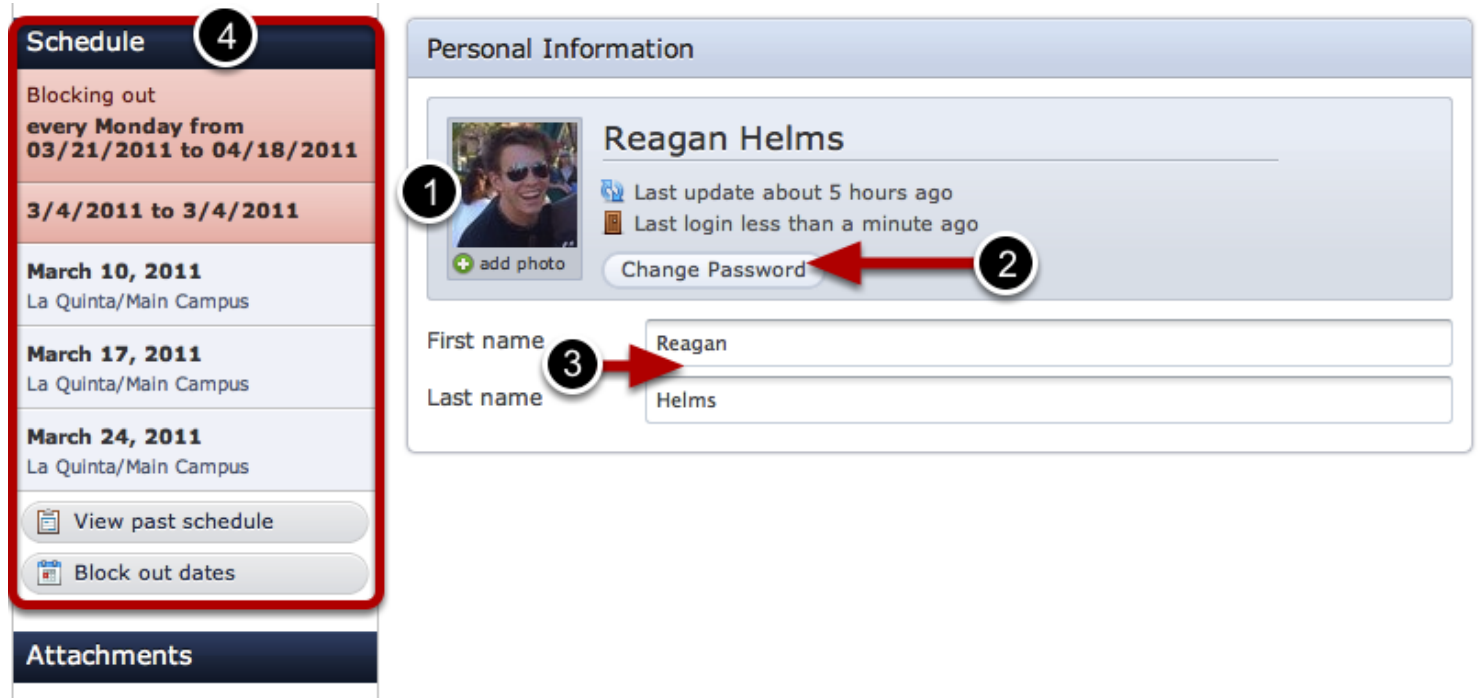
Updating Your Personal Information

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.



Schedule 4

Blocking out every Monday from 03/21/2011 to 04/18/2011

3/4/2011 to 3/4/2011

March 10, 2011
La Quinta/Main Campus

March 17, 2011
La Quinta/Main Campus

March 24, 2011
La Quinta/Main Campus

View past schedule

Block out dates

Attachments

Personal Information

Reagan Helms

Last update about 5 hours ago
Last login less than a minute ago

add photo

Change Password

First name Reagan

Last name Helms

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.

Contact Information

E-Mail Addresses 1 Add email +

Home reagan@ministrycentered.com -

Addresses 2 Add address +

Home Test test -

lalala , LA 12345

Phone Numbers 3 Add phone +

Mobile (760) 485-6110 -

Enable Text Messaging AT&T +

Scheduling Emails **General E-Mails**

Dates 4

Birth Date Anniversary

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

Save Person

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

CENTRAL CHRISTIAN CHURCH

schedule

Blake Riley | Central Christian Church














help logout

Henderson Weekend Service

You have accepted the **Bass Guitar** position. [\[change\]](#)

April 16 & 17, 2011
Good Friday

rehearse live print this plan

Length in mins		Person	Notes
Start of Service			
5	 Hosanna [E]	Allison & Worship Team	2 notes 5 attachments
5	 Jesus Paid It All [B]	Drew & Worship Team	2 notes 11 attachments
1:30	 Prayer / Turn & Greet	Drew Bodine	2 notes
0:15	 Video Bumper: Central Branding	Video Team	2 notes
2	 Welcome & Offering Comments		
1:30	 Offering & Announcements		
5:30	 You Are My Savior [Bb]	Drew & Worship Team	2 notes 10 attachments
2	 Featured Video: That's Real Love		1 attachment
20	 Message	Jud Wilhite	2 notes
1	 Communion Setup <i>Handoff to regional campus pastors</i>	Jud Wilhite	1 note
0	 COMMUNION SONG		
5	 Communion / Closing Prayer <i>Partaking of the communion elements</i>		
1	 Next Steps / Dismissal	Jud Wilhite	2 notes

49:45

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.

5:30 **You Are My Savior [Bb]** Drew Bodine
Drew & Worship Team 2 notes 10 attachments

Notes
Person: Drew & Worship Team
Lights: 15
BPM: 70

Attachments
Arrangement attachments
Ph attachments
You Are My Savior [Bb].pdf
You Are My Savior.mp3
amazonmp3

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

CENTRAL CHRISTIAN CHURCH Blake Riley | Central Christian Church
schedule help logout

Henderson Weekend Service

You have accepted the **Bass Guitar** position. [\[change\]](#)

April 16 & 17, 2011
Good Friday

[rehearse](#) [live](#) [print this plan](#)

Length in mins		Person	Notes
Start of Service			
5	Hosanna [E]	Allison & Worship Team	2 notes 5 attachments
5	Jesus Paid It All [B]	Drew & Worship Team	2 notes 11 attachments

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

New Service Type

Name

Default Categories & Positions

 We'd love to help you get started by creating some sample people categories for you! Check the categories you'd like to be added. Don't worry if they aren't exactly what you need because you can easily change them at any time.

<input checked="" type="checkbox"/> Audio/Visual Lights, Audio, Camera, Producer, Video Switcher, Sound, Lyrics	<input checked="" type="checkbox"/> Vocals <input type="radio"/> Soprano, Alto, Tenor, Bass, Choir, Soloist, Worship Leader <input checked="" type="radio"/> Worship Team, Worship Leader
<input checked="" type="checkbox"/> Band Drums, Bass Guitar, Acoustic Guitar, Electric Guitar, Keys, Percussion, Piano, Organ, Worship Leader	<input type="checkbox"/> First Impressions Greeter, Usher, Set Up, Tear Down, Parking
<input type="checkbox"/> Orchestra Violin, Viola, Cello, Flute, Clarinet, Trumpet, Trombone, Sax, Director	<input type="checkbox"/> Children's Ministry Infants, Toddlers, 2's and 3's, 4's and 5's, K-2, 3-5

[cancel](#)

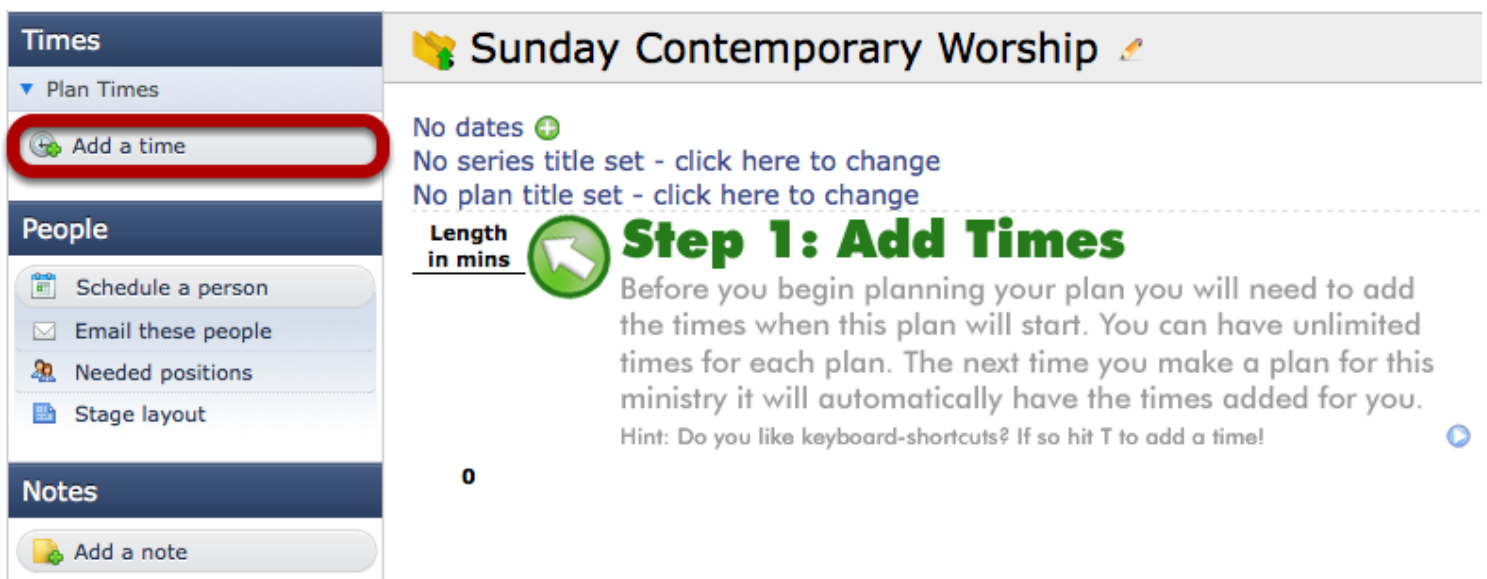
A **Service Type** is a set of plans that are grouped together. Service Types are most commonly used for the different services you advertise or for different ministries in your church. For example, this church has a *Sunday Contemporary Worship Service* that occurs every week at 9:00AM & 10:30AM, and 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 Service 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



The screenshot shows the interface for a service type named "Sunday Contemporary Worship". On the left, there is a sidebar with sections: "Times" (containing "Plan Times" and a red-bordered "Add a time" button), "People" (containing "Schedule a person", "Email these people", "Needed positions", and "Stage layout"), and "Notes" (containing "Add a note"). The main content area shows the service title, a "No dates" status with a plus icon, and links to "No series title set" and "No plan title set". A large green arrow icon points to the text "Step 1: Add Times", which is followed by instructions: "Before you begin planning your plan you will need to add the times when this plan will start. You can have unlimited times for each plan. The next time you make a plan for this ministry it will automatically have the times added for you." A hint below reads: "Hint: Do you like keyboard-shortcuts? If so hit T to add a time!". A "Length in mins" field with a value of "0" is visible below the instructions.

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.

Editing Time

Date: 

Time: to

Type:

Name:

Assigned People Categories
 Check All Uncheck All

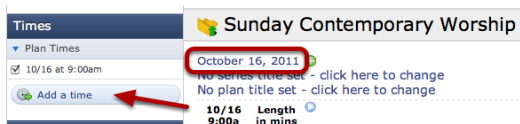
<input checked="" type="checkbox"/> Audio/Visual	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Band	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Vocals	<input type="text" value="No Reminder"/>

Update This Time In Future Plans

[cancel](#)

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](#).



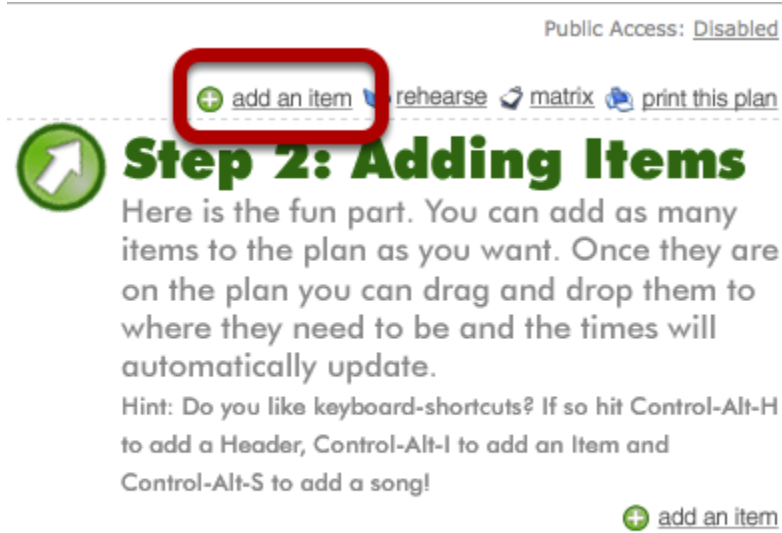
Any **Plan Times** you add are reflected where it previously said 'no dates'.

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



Public Access: [Disabled](#)

[+ add an item](#) [rehearse](#) [matrix](#) [print this plan](#)

Step 2: Adding Items

Here is the fun part. You can add as many items to the plan as you want. Once they are on the plan you can drag and drop them to where they need to be and the times will automatically update.

Hint: Do you like keyboard-shortcuts? If so hit Control-Alt-H to add a Header, Control-Alt-I to add an Item and Control-Alt-S to add a song!

[+ add an item](#)

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".

Add An Item [\[convert to header\]](#)

1

2 :

min sec

3 **Item Description**

4 **Detail**

5 **Item Notes**

Audio/Visual	<input style="width: 80%;" type="text"/>
Band	<input style="width: 80%;" type="text"/>
Person	<input style="width: 80%;" type="text" value="Mike Bodine"/>
Vocals	<input style="width: 80%;" type="text"/>

There is no song attached to this item.

[+ Add a Song](#)

Linked Media

[+ Add Media](#)

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


Sunday Contemporary Worship






October 16, 2011 

Public Access

No series title set - [click here to change](#)

No plan title set - [click here to change](#)

10/16	10/16	Length	
9:00a	10:30a	in mins	
9:00a	10:30a	2	 Announcements <i>1 - Church Potluck</i> <i>2 - Donate Canned Food for Rescue Mission</i>
9:02	10:32	2	

-  [add an item](#)  rehearse
-  [add a header](#)
-  [add a song](#)
-  [add media](#)
- [apply a template](#)

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**.

Add A Header

 [cancel](#)

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





October 16, 2011 

Public Acce

No series title set - [click here to change](#)

No plan title set - [click here to change](#)

10/16	10/16	Length	
9:00a	10:30a	in mins	
9:00a	10:30a	2	 Announcements
1 - Church Potluck			
2 - Donate Canned Food for Rescue Mission			

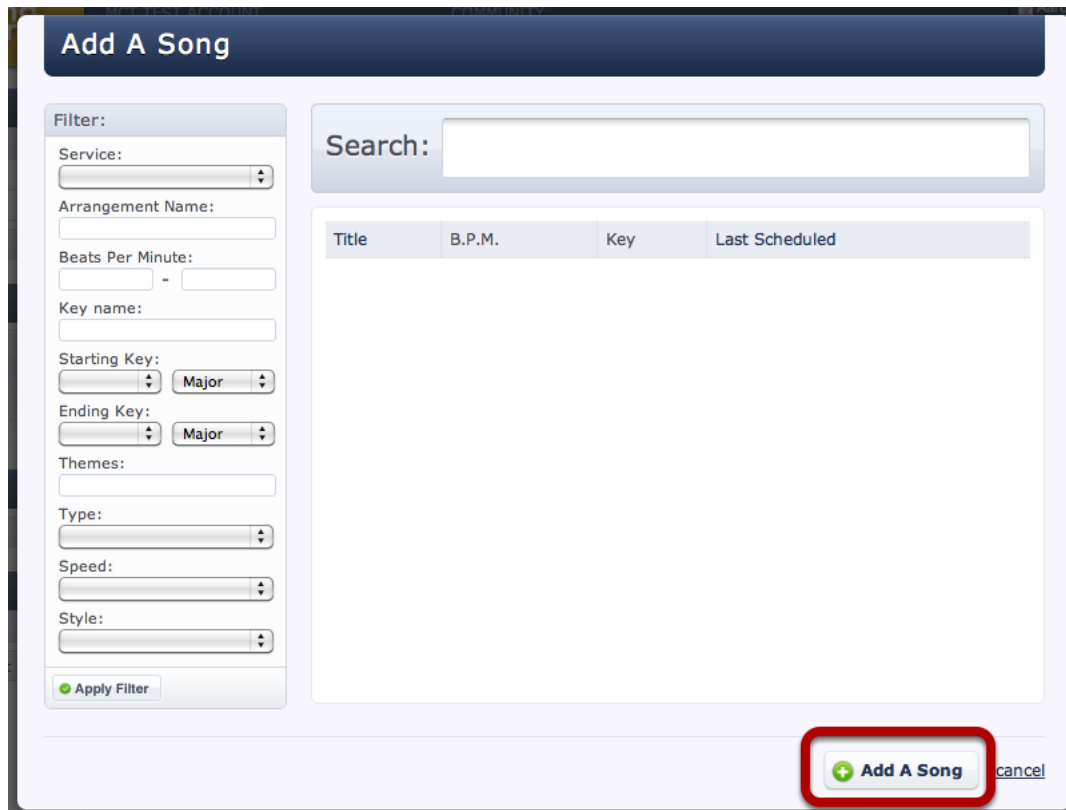
-  [add an item](#)  rehearse
-  [add a header](#)
-  [add a song](#)
-  [add media](#)
- [apply a template](#)

Worship Set

9:02 10:32 2

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 keyboard 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.

TEST ACCOUNT COMMUNITY

New Song

CCLI # or Title **Mighty to Sav** ①

Type

② Chorus

Mighty To Save 2397122
 by Colin Buchanan
 Mighty To Save 4591782
 by Ben Fielding and Reuben Morgan

Arrangement Information

③

Name Length BPM

Default Arrangement 0 0

mins secs

Speed

Style

Starting Key ④ Ending Key

Major Major

[cancel](#)

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 arrangement names. If your arrangement is by a certain artist, you can title your arrangement 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.

Sunday Contemporary Worship

October 16, 2011  Public Access: [Disabled](#) | [Tweet your #WorshipSet](#)

No series title set - [click here to change](#)
No plan title set - [click here to change](#)



 [add an item](#)  [rehearse](#)  [matrix](#)  [live](#)  [print this plan](#)

10/16 9:00a	10/16 10:30a	Length in mins		
9:00a	10:30a	2		Announcements 1 note
1 - Church Potluck 2 - Donate Canned Food for Rescue Mission				
Worship Set				
9:02a	10:32a	5		Mighty To Save [A]    
9:07a	10:37a	7:00		 add an item

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

10/16 9:00a	10/16 10:30a	Length in mins		
9:00a	10:30a	2		Announcements
1 - Church Potluck 2 - Donate Canned Food for Rescue Mission				
Worship Set				
9:02a	10:32a	5		Mighty To Save [A]    
9:07a	10:37a	7:00		

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



Times

Plan Times

- 10/16 at 9:00am
- 10/16 at 10:30am

[Add a time](#)

People

- [Schedule a person](#)
- [Email these people](#)
- [Needed positions](#)

Sunday Contemporary W

October 16, 2011 [+](#)

No series title set - [click here to change](#)

No plan title set - [click here to change](#)

10/16	Length	
9:00a	in mins	
9:00a	2	▶ Announcements 1 - Church Potluck 2 - Donate Canned Food for
Worship Set		
9:02a	5	▶ Mighty To Save [A]
9:07	7	

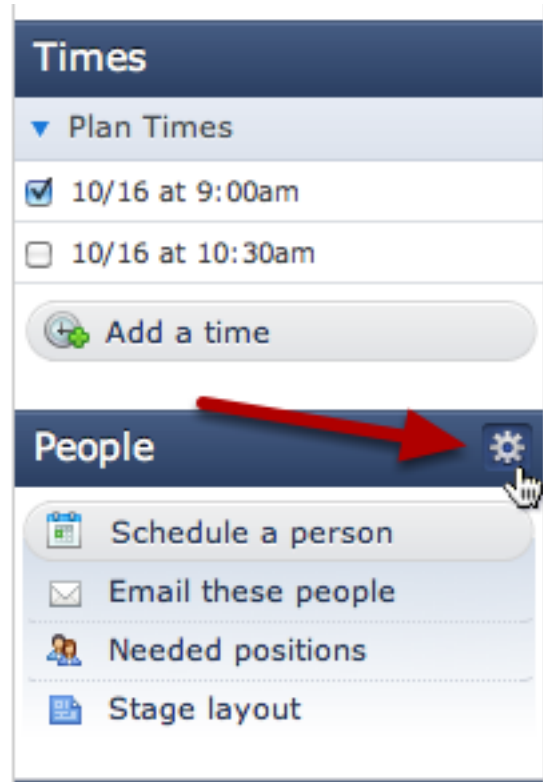
Planning Center has columns for each of your Plan Times so you can see what time each element is planned to occur. By using the checkmarks next to each Plan Time in your Times box, you can show or hide these time columns next to your elements. I have the 9:00am time checked, so there is a 9:00am time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

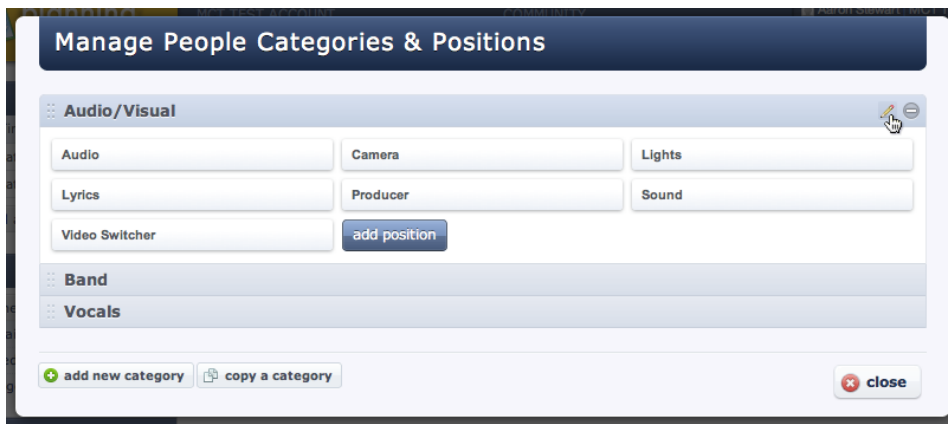
Adding People and Assigning Them to Positions

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.

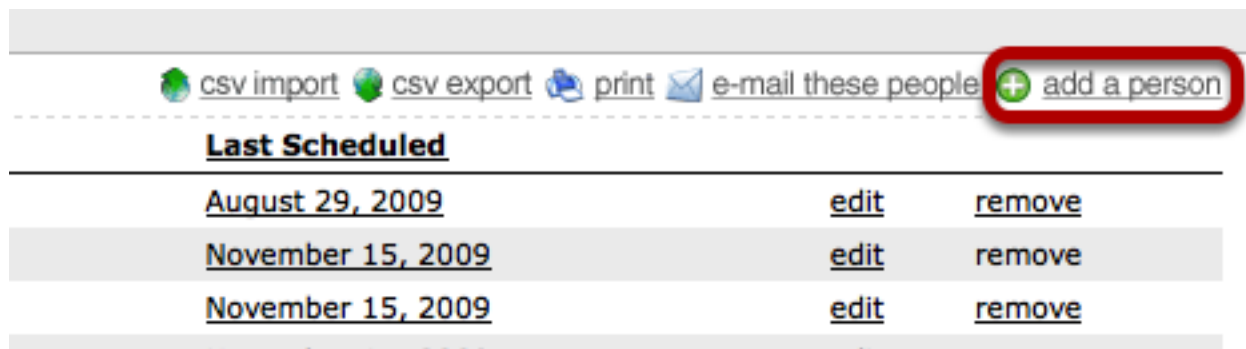
Feel free to add or edit any of the Categories or Positions here. For more information, read [this article](#).

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

Create A New Person

Personal Information



First

Last

Notes

Notes are only visible & editable by schedulers.

Send a welcome email

Contact Information

E-Mail Addresses Add email +

Home

Addresses Add address +

Home

Phone Numbers Add phone +

Home

Dates

Birth Date Anniversary

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

Permissions

[Click here for an explanation of the permissions](#)

Site Permissions: Scheduled Viewer

Sunday Contemporary Worship: Same As Parent

- Access Plan Files
- Access Song Streams & Files
- Access Media Streams & Files

Custom Properties

Custom Field	Property
Search	

Assigned Positions

Service Type	Category	Position
Search		

Save Person

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

Assigned Positions

Service Type	Category	Position
L		
Lights (Audio/Visual)		
Lyrics (Audio/Visual)		

Let's assign this new person to our lights position. In the Assigned Positions 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 arrangements 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

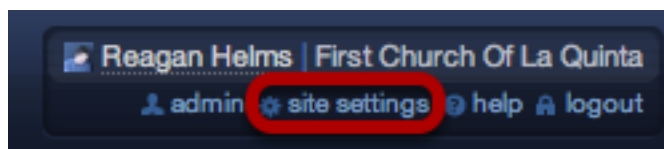
different users see different files. For example, set it up so that only Band members can see chord charts, Vocalists can see lyrics, or different members of your orchestra only see the sheet music for their instrument.

Account Administration

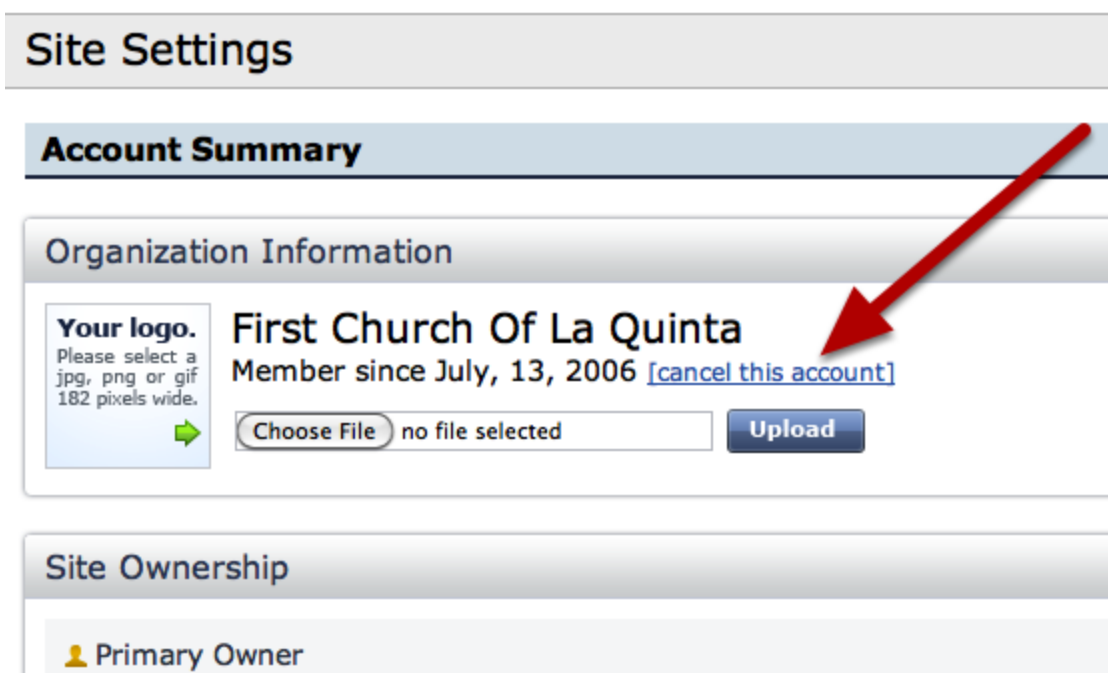
Canceling Your Account

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'

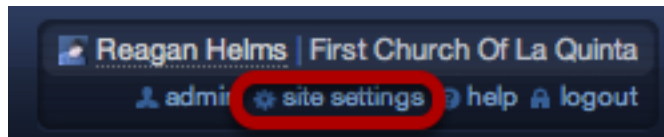
The screenshot shows the "Site Settings" page. The "Account Summary" section is highlighted with a light blue bar. Below it, the "Organization Information" section is visible. It shows the church name "First Church Of La Quinta" and the membership date "Member since July, 13, 2006". A blue link labeled "[cancel this account]" is highlighted with a red arrow. Below this, there is a file upload section with a "Choose File" button, the text "no file selected", and an "Upload" button. The "Site Ownership" section below shows a "Primary Owner" with a person icon.

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 cancellation email notification. Your credit card (if there was one on file) will no longer be charged.

Changing A Payment Method

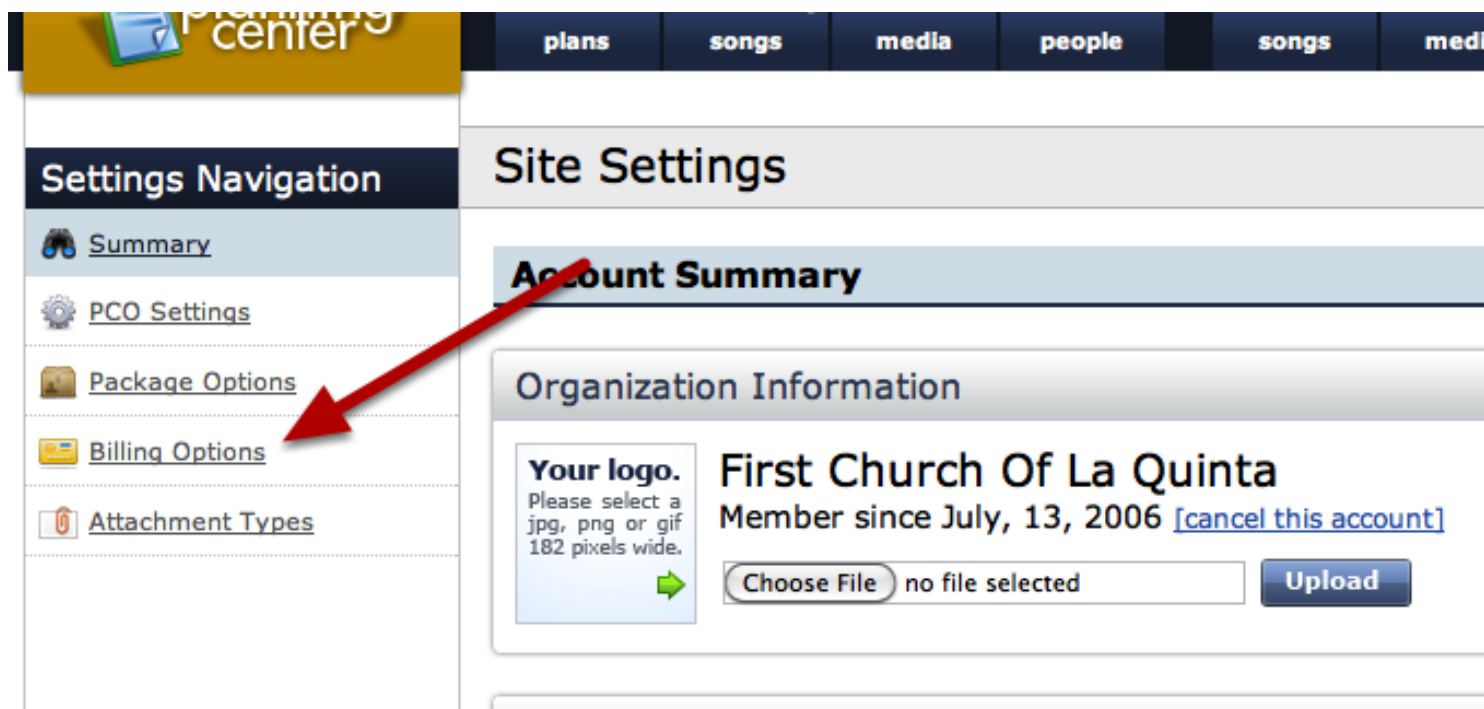
These steps show you how to change your method of payment. This lesson will also be helpful if a credit card could not be charged and you need to re-run it.

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:

Site Settings

Billing Information & Options

Your Billing Info

Payment Method: Credit Card Check

Payment Schedule: \$1194 every 6 months \$2388 every 12 months

We will e-mail you an invoice after this is complete so that you can turn it into your accounting department and not have a lapse in your account. If this is a problem please e-mail support@ministrycentered.com

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:

Billing Information & Options

Your Billing Info





Payment Method: Credit Card Check

Payment Schedule: \$199 every month \$597 every 3 months

The next charge will be on May, 11, 2010.

Street Address:

Zip Code:

Credit Card Number:

Expiration Date:

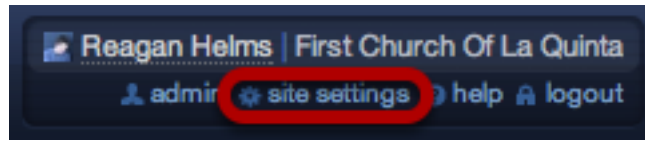
Security Code:

[Change Payment Method](#)

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).

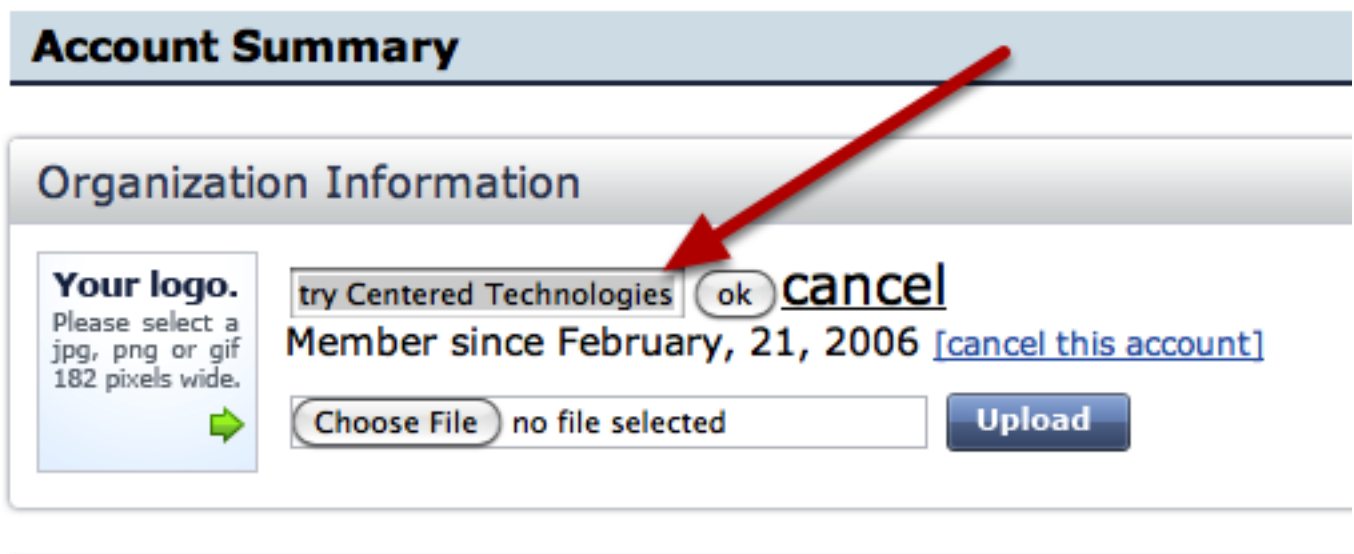
Changing The Name of Your Account

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.

The screenshot shows the "Account Summary" page. Under the "Organization Information" section, there is a text input field containing "try Centered Technologies". To the right of the input field are "ok" and "cancel" buttons. Below the input field, it says "Member since February, 21, 2006" with a link "[cancel this account]". At the bottom of the section, there is a "Choose File" button, a text box containing "no file selected", and an "Upload" button. A red arrow points from the top right towards the "try Centered Technologies" text.

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

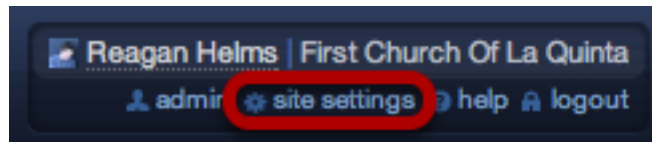
Please note that we CANNOT rerun a card for you. It has to be done manually by you. Here is the process to rerun a credit card:

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

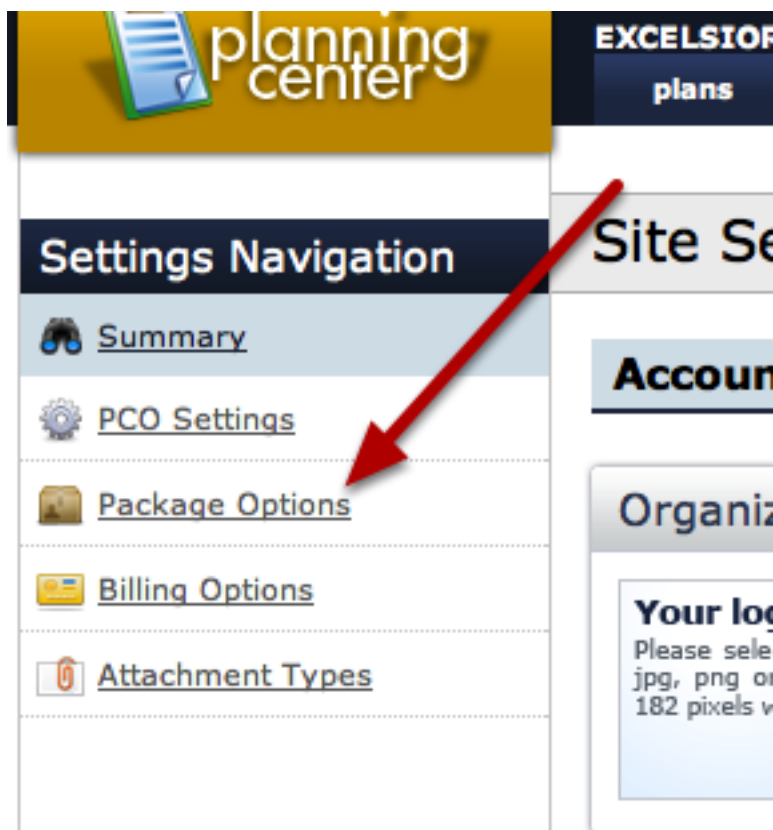
This lesson shows you how to take advantage of our Extra File Storage feature.

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

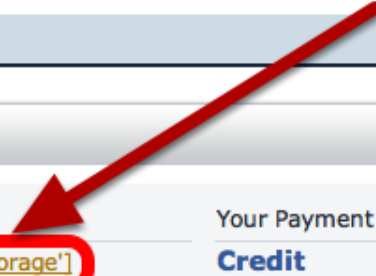
Navigation

Site Settings

Planning Center Packages

Your Package

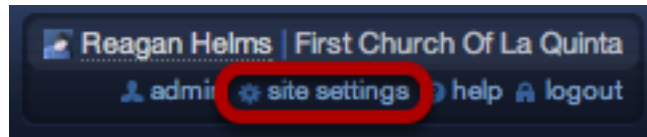
Package Name	Package Cost	Extra File Storage	Your Payment Method:
Lite_Plus	\$14/month	[Enable 'Extra File Storage']	Credit



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.

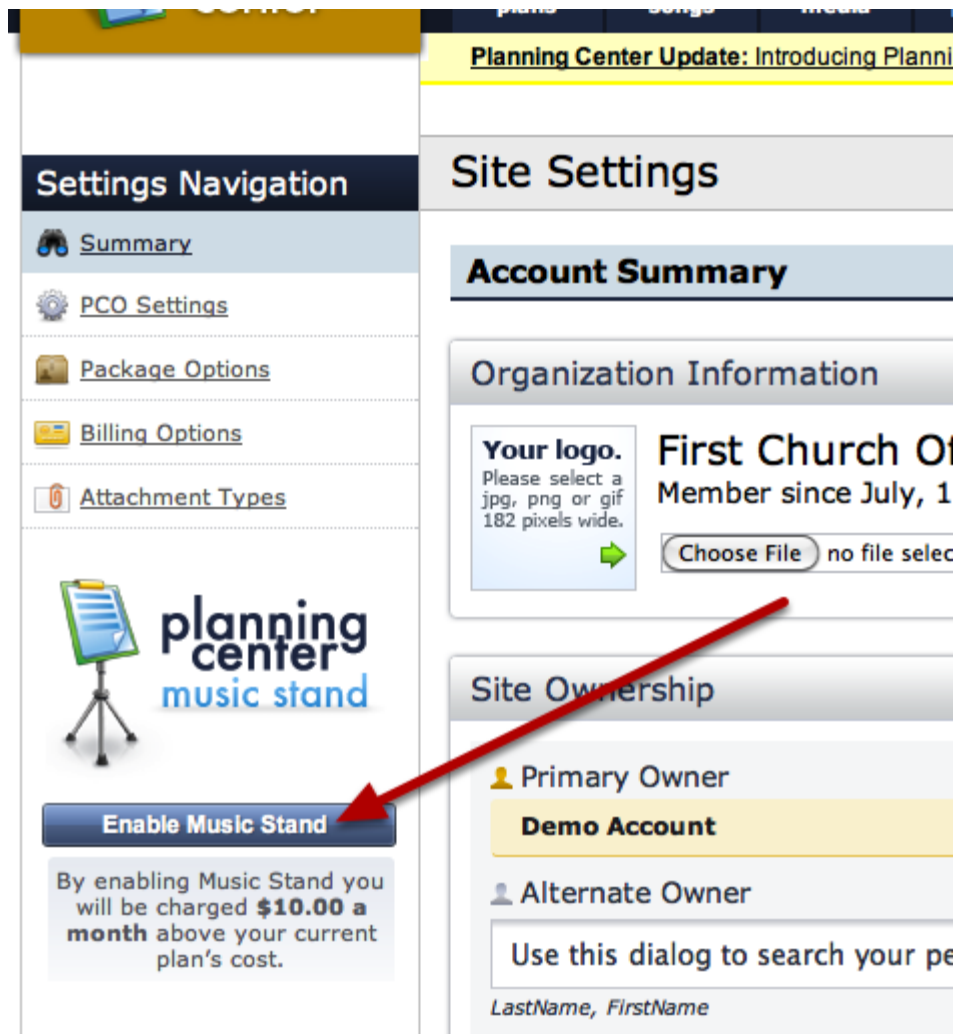
Enabling/Disabling Music Stand

Click 'site settings' in the upper right corner.

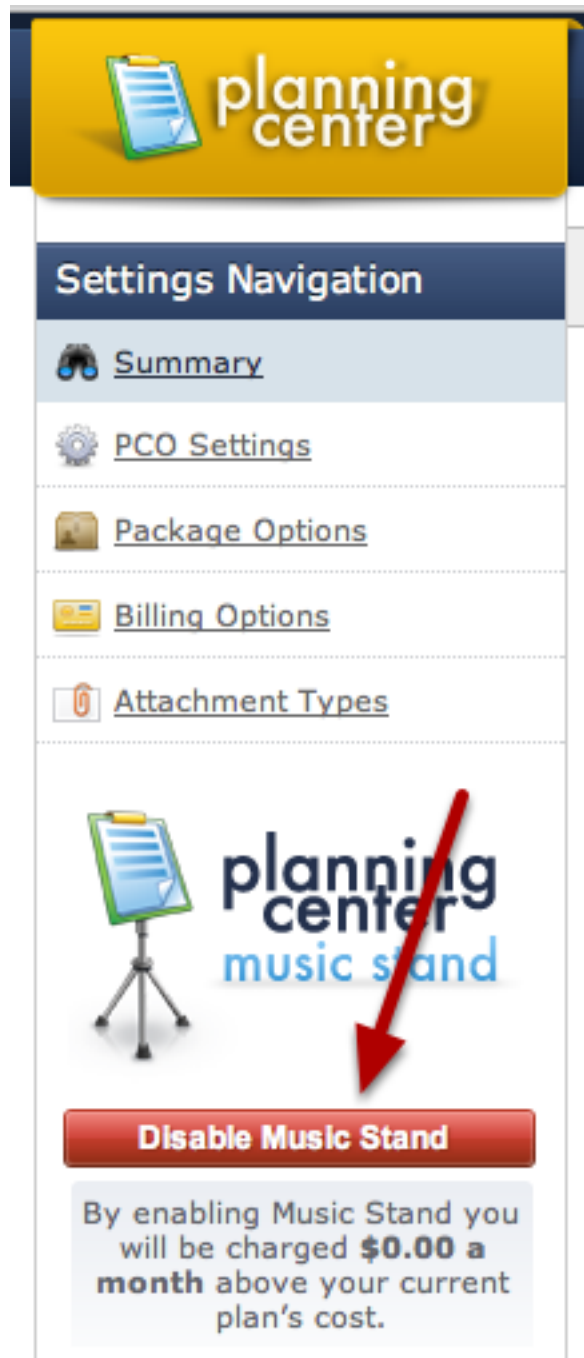


Note: only Primary and Secondary Site Administrators will have access to the 'site settings' page.

Click 'Enable Music Stand' on the left sidebar.

A screenshot of the 'Site Settings' page. The left sidebar contains a 'Settings Navigation' menu with options: Summary, PCO Settings, Package Options, Billing Options, and Attachment Types. Below the menu is a 'planning center music stand' logo and a blue button labeled 'Enable Music Stand'. A red arrow points to this button. Below the button, a text box states: 'By enabling Music Stand you will be charged \$10.00 a month above your current plan's cost.' The main content area is titled 'Site Settings' and includes sections for 'Account Summary', 'Organization Information', and 'Site Ownership'. The 'Organization Information' section shows 'First Church Of La Quinta' as the member since July, 1, with a 'Choose File' button for uploading a logo. The 'Site Ownership' section lists 'Primary Owner' as 'Demo Account' and 'Alternate Owner' as a search field.

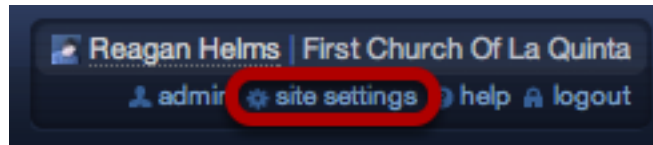
To Disable Music Stand, click on the button again.



The screenshot shows the 'planning center' settings interface. At the top is a yellow header with a clipboard icon and the text 'planning center'. Below this is a dark blue 'Settings Navigation' bar. A list of settings options follows: 'Summary' (with a headset icon), 'PCO Settings' (with a gear icon), 'Package Options' (with a folder icon), 'Billing Options' (with a calendar icon), and 'Attachment Types' (with a paperclip icon). Below the list is a section for 'planning center music stand', featuring a music stand icon and the text 'planning center music stand'. A large red arrow points from the text down to a red button labeled 'Disable Music Stand'. Below the button is a text box stating: 'By enabling Music Stand you will be charged **\$0.00 a month** above your current plan's cost.'

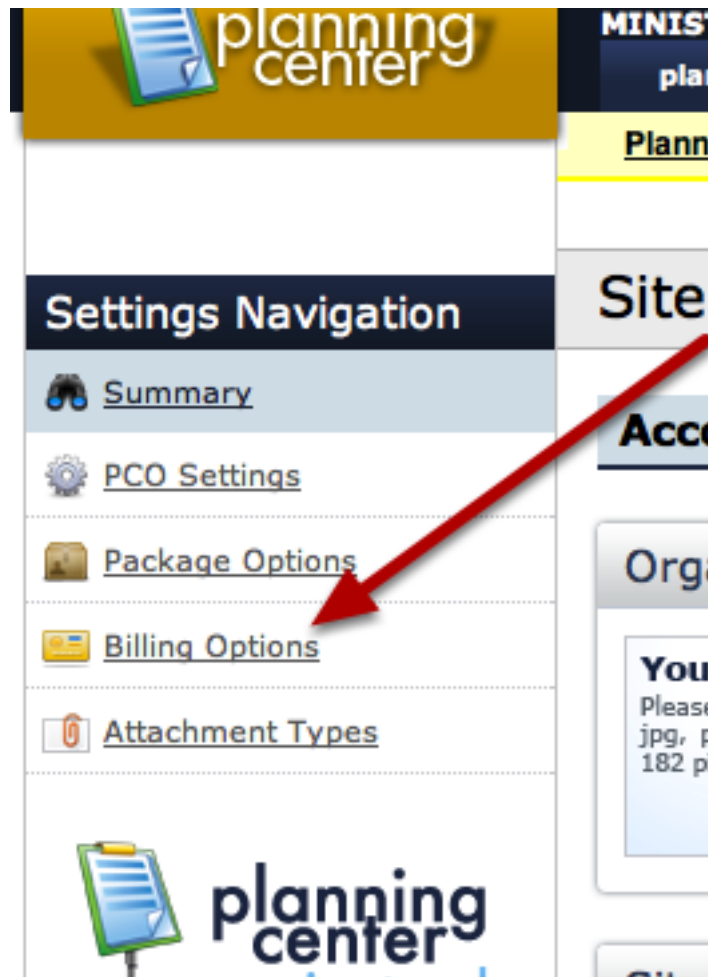
Printing Receipts and Viewing Previous Payments

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.

Site Settings

Billing Information & Options

Your Billing Info

Payment Method: Credit Card Check

Payment Schedule: \$49 every month \$147 every 3 months

The next charge will be on May, 14, 2010.

Street Address:

Zip Code:



Credit Card Number:

Expiration Date:

Security Code:

[Change Payment Method](#)

Payment History

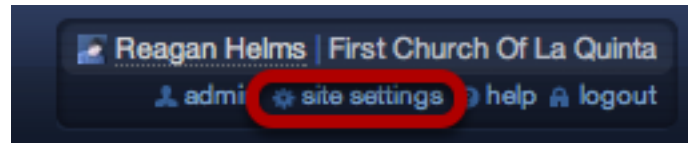
Payment Date	Payment Amount	Status
04/14/2010 at 11:35 AM	\$49.00	PAID
03/14/2010 at 11:44 AM	\$49.00	PAID
02/14/2010 at 10:25 AM	\$49.00	PAID
01/14/2010 at 10:25 AM	\$49.00	PAID
12/14/2009 at 10:25 AM	\$49.00	PAID
11/14/2009 at 10:25 AM	\$49.00	PAID

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

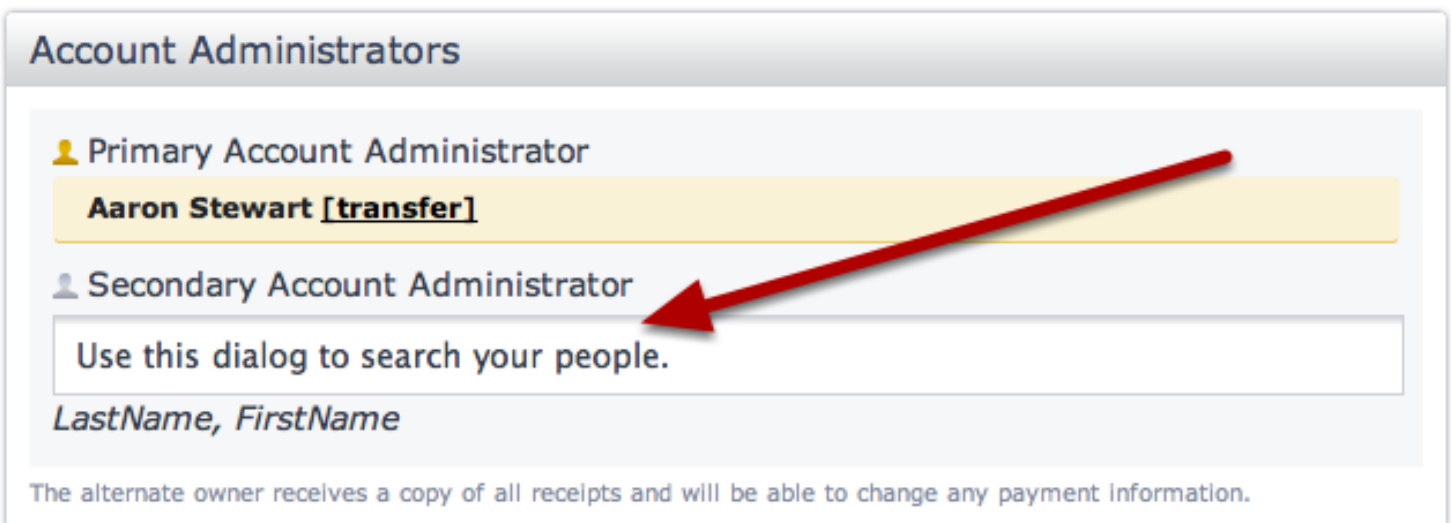
Learn how to add a Secondary Account Administrator who has the same rights as the Primary Account Administrator. This person can be set as a user in your finance department so they receive your billing invoices. Also learn how to request a change to Account Admins.

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:


A screenshot of the 'Account Administrators' page. It shows two sections: 'Primary Account Administrator' with 'Aaron Stewart [transfer]' and 'Secondary Account Administrator'. Below the 'Secondary Account Administrator' section is a search box with the text 'Use this dialog to search your people.' and a red arrow pointing to it. Below the search box is the text 'LastName, FirstName'. At the bottom of the page, there is a note: 'The alternate owner receives a copy of all receipts and will be able to change any payment information.'


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

Account Administrators

 Primary Account Administrator

Aaron Stewart [transfer] 

 Secondary Account Administrator

Use this dialog to search your people.

LastName, FirstName

The alternate owner receives a copy of all receipts and will be able to change any payment information.

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.

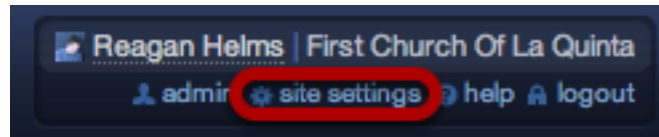
If your current Primary or Secondary Account Administrators are no longer at your church and you can't login as them, you must email support to change the Administration of the account. We will need an email from another pastor with an official church email address stating that the current Admin is not 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.

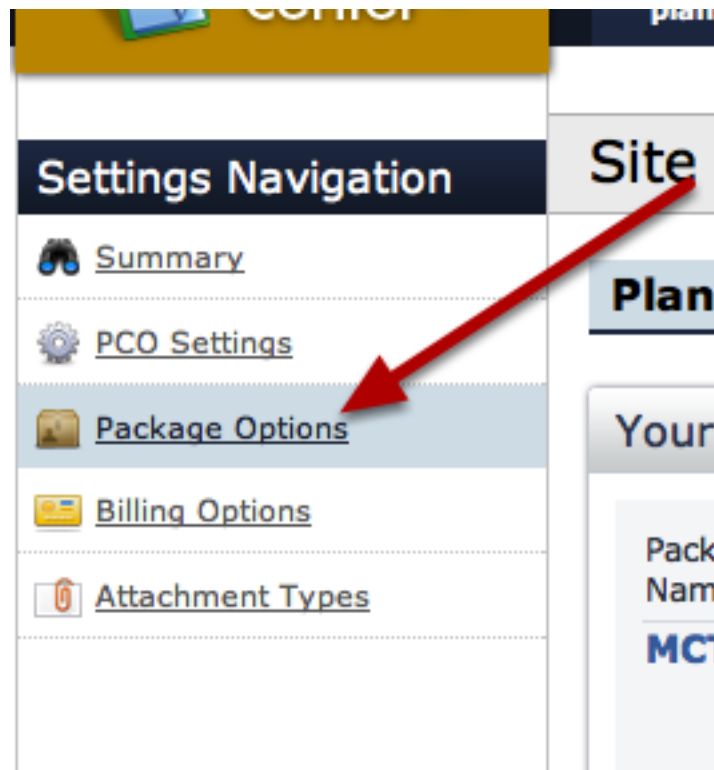
Upgrading/Downgrading Your Account

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.

Package Name Lite_Plus	Package Cost \$14/month	Extra File Storage [Enable 'Extra File Storage']	Your Payment Method: Credit	Your next payment: June, 03, 2010 <small>on your credit card end</small>
----------------------------------	-----------------------------------	---	---------------------------------------	---

Your Package

	Free	Lite	Basic	Plus
	\$0 monthly Downgrade	\$14 monthly Current Plan	\$29 monthly Upgrade	\$49 monthly Upgrade
Plans	Unlimited	Unlimited	Unlimited	Unlimited
Service Types	1	1	2	5
People	10	35	75	250
Included space for file sharing	No file sharing	200 MB	1 GB	5 GB
Chord Chart Transposing		✓	✓	✓
PCO Community		✓	✓	✓
Planning Center Live			✓	✓

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

Click 'Downgrade' to downgrade your account.

Package Name Lite_Plus	Package Cost \$14/month	Extra File Storage [Enable 'Extra File Storage']	Your Payment Method: Credit	Your next payment June, 03, 2010 <small>on your credit card end</small>
----------------------------------	-----------------------------------	---	---------------------------------------	--

Your Package

	Free	Lite	Basic	Plus
	\$0 monthly Downgrade	\$14 monthly Current Plan	\$29 monthly Upgrade	\$49 monthly Upgrade
Plans	Unlimited	Unlimited	Unlimited	Unlimited
Service Types	1	1	2	5
People	10	35	75	250
Included space for file sharing	No file sharing	200 MB	1 GB	5 GB
Chord Chart Transposing		✓	✓	✓
PCO Community		✓	✓	✓
Planning Center Live			✓	✓

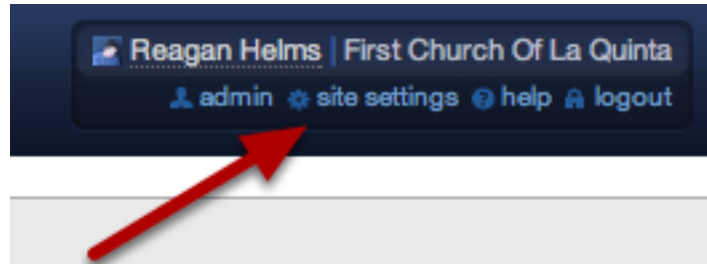
Once you downgrade, your next payment will reflect the downgraded price. If the downgrade button is not red, like above, but rather is grey, that means you will need to look to the far left under [Usage](#) and make sure you fit within the requirements of the plan you wish to downgrade to. Most

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

A screenshot of the 'planning center' web application interface. The top navigation bar is dark blue and contains the text 'FIRST CHURCH OF LA QUINTA' and four tabs: 'plans', 'songs', 'media', and 'people'. Below this is a 'Site Settings' section. The left sidebar is white and contains a 'Settings Navigation' menu with links for 'Summary', 'PCO Settings', 'Package Options', 'Billing Options', and 'Attachment Types'. A red arrow points to the 'PCO Settings' link. The main content area is white and contains an 'Account Summary' section with 'Organization Information' and 'Site Ownership' sections. The 'Organization Information' section shows 'Your logo.' with instructions to select a jpg, png or gif 182 pixels wide, and a 'Choose File' button. The 'Site Ownership' section shows 'Primary Owner'.

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

My Planning Center Settings

General Settings

Calendar Starts On:

Sunday

Default User Permissions:

Viewer

Block Viewers From Viewing People:

False

Block Schedulers From Editing People:

False

Allow Admins To Delete Anything:

✓ True

False

Time Zone:

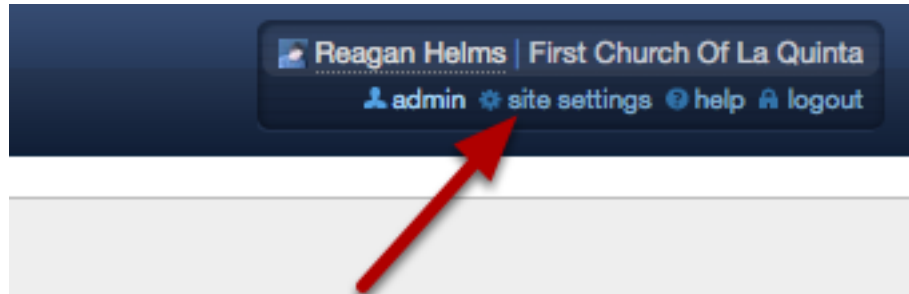
(GMT-08:00) Pacific Time (US & Canada)

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

Changing Your Country

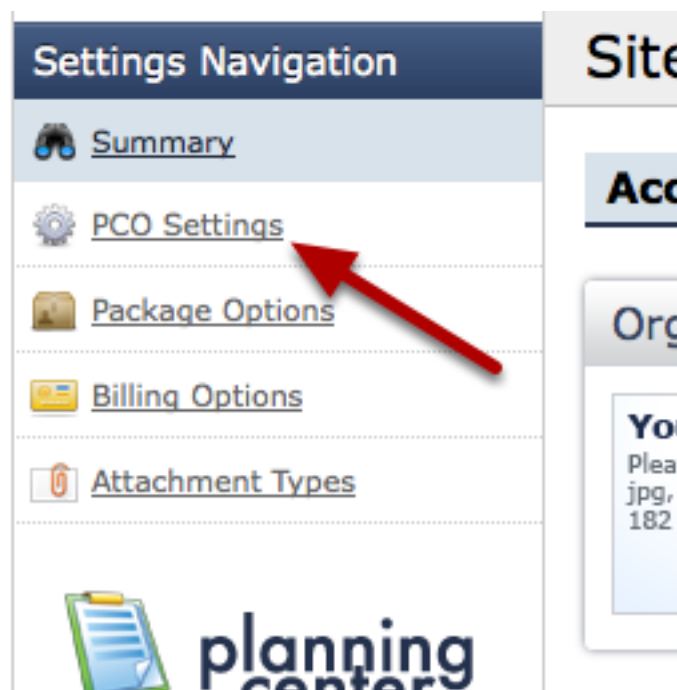
Note: You will need to be the Primary or Secondary Account Administrator in order to have access to the site settings

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

Stand

Stand you
0.00 a
r current

Types

Block Schedulers From Editing People:
False

Allow Admins To Delete Anything:
True

Country:
United States

- Syrian Arab Republic
- Taiwan, Province of China
- Tajikistan
- Tanzania, United Republic of
- Thailand
- Timor-Leste
- Togo
- Tokelau
- Tonga
- Trinidad and Tobago
- Tunisia
- Turkey
- Turkmenistan
- Turks and Caicos Islands
- Tuvalu
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States

Policy | Terms of Service

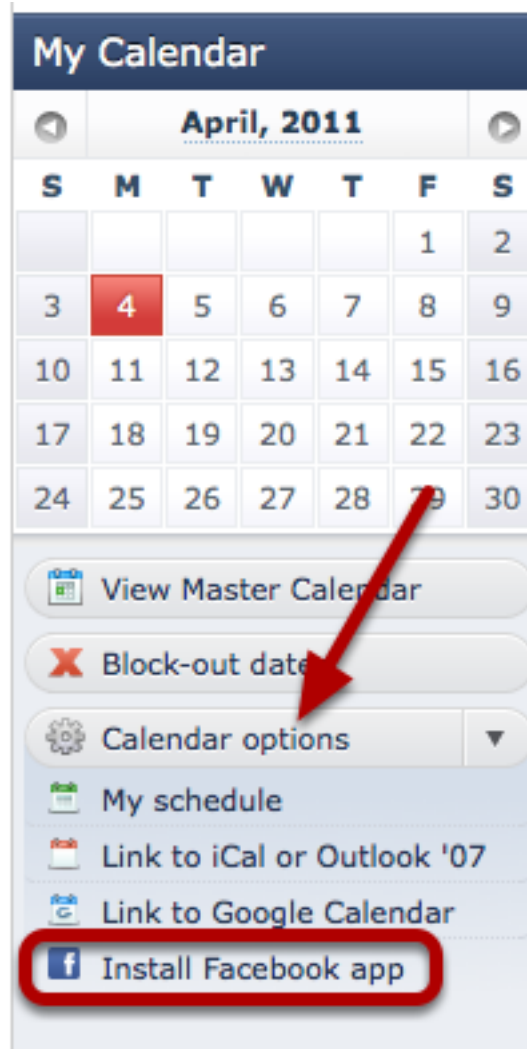
Organization #96

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.



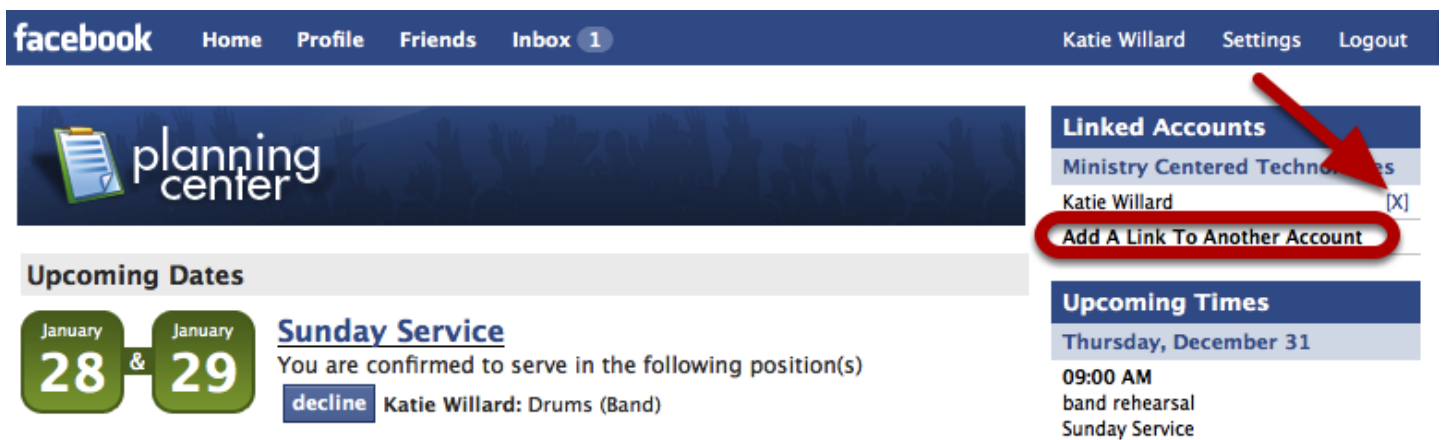
Enter your email address and password.



The image shows a login form for Planning Center. At the top left is a logo consisting of a clipboard icon and the text "planning center". To the right of the logo is a link that says "forgot password?". Below this are two input fields: "E-mail Address:" and "Password:". Under the password field is a checkbox labeled "remember me" and a blue "Go" button.

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

Facebook App automatically installed.

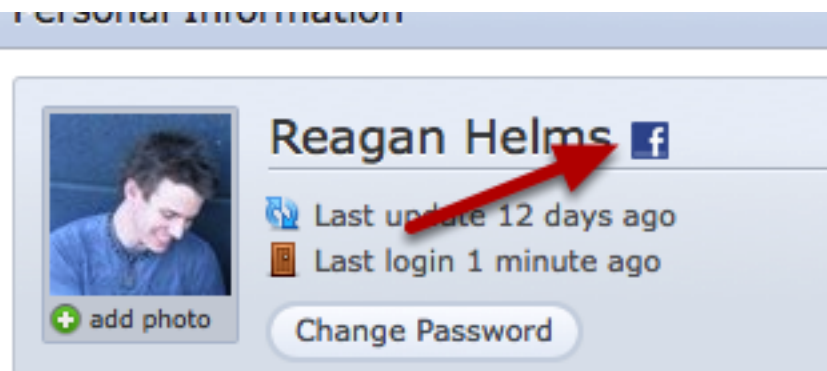


The image shows a Facebook profile page for "Katie Willard". The top navigation bar includes "facebook", "Home", "Profile", "Friends", "Inbox 1", "Katie Willard", "Settings", and "Logout". The profile header features the "planning center" logo. On the right side, there is a "Linked Accounts" section. It lists "Ministry Centered Technologies" and "Katie Willard" with an "[X]" icon. A red arrow points to the "Add A Link To Another Account" button, which is circled in red. Below this are sections for "Upcoming Dates" (showing "January 28 & 29" for "Sunday Service") and "Upcoming Times" (showing "Thursday, December 31" at "09:00 AM" for "band rehearsal" and "Sunday Service").

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.

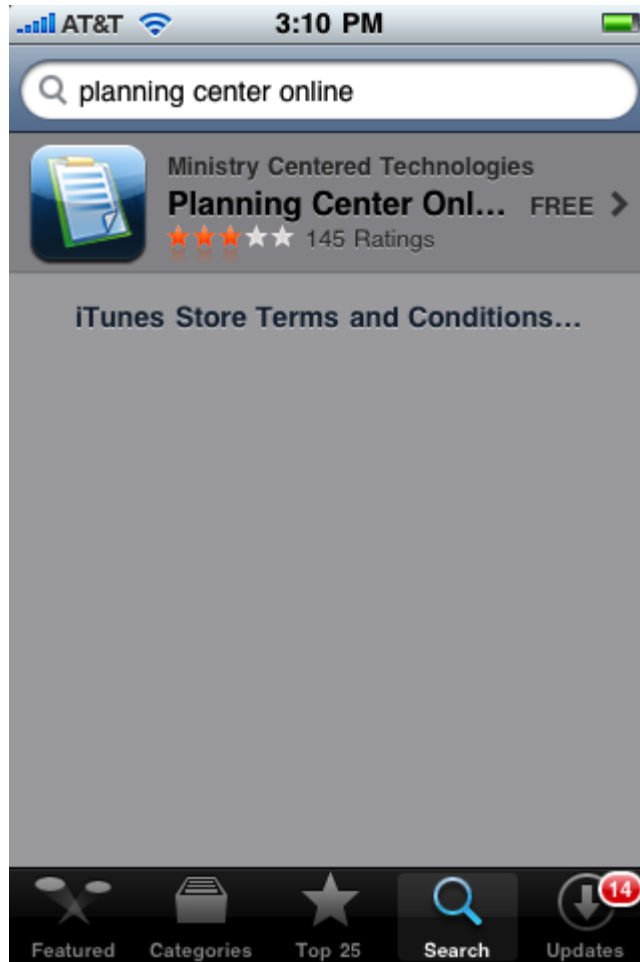


Once you're signed up for the facebook app, it will show up on your profile page. This is also convenient for administrators, as they can look through their people to see who has the facebook app.

iPhone App

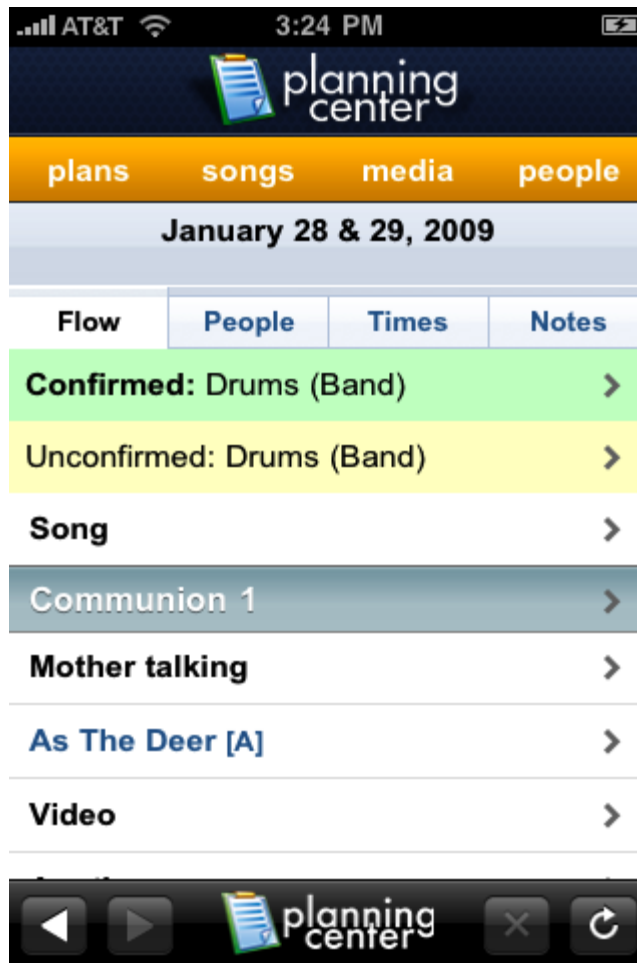
This manual gives you helpful information about downloading and using the iPhone App.

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!



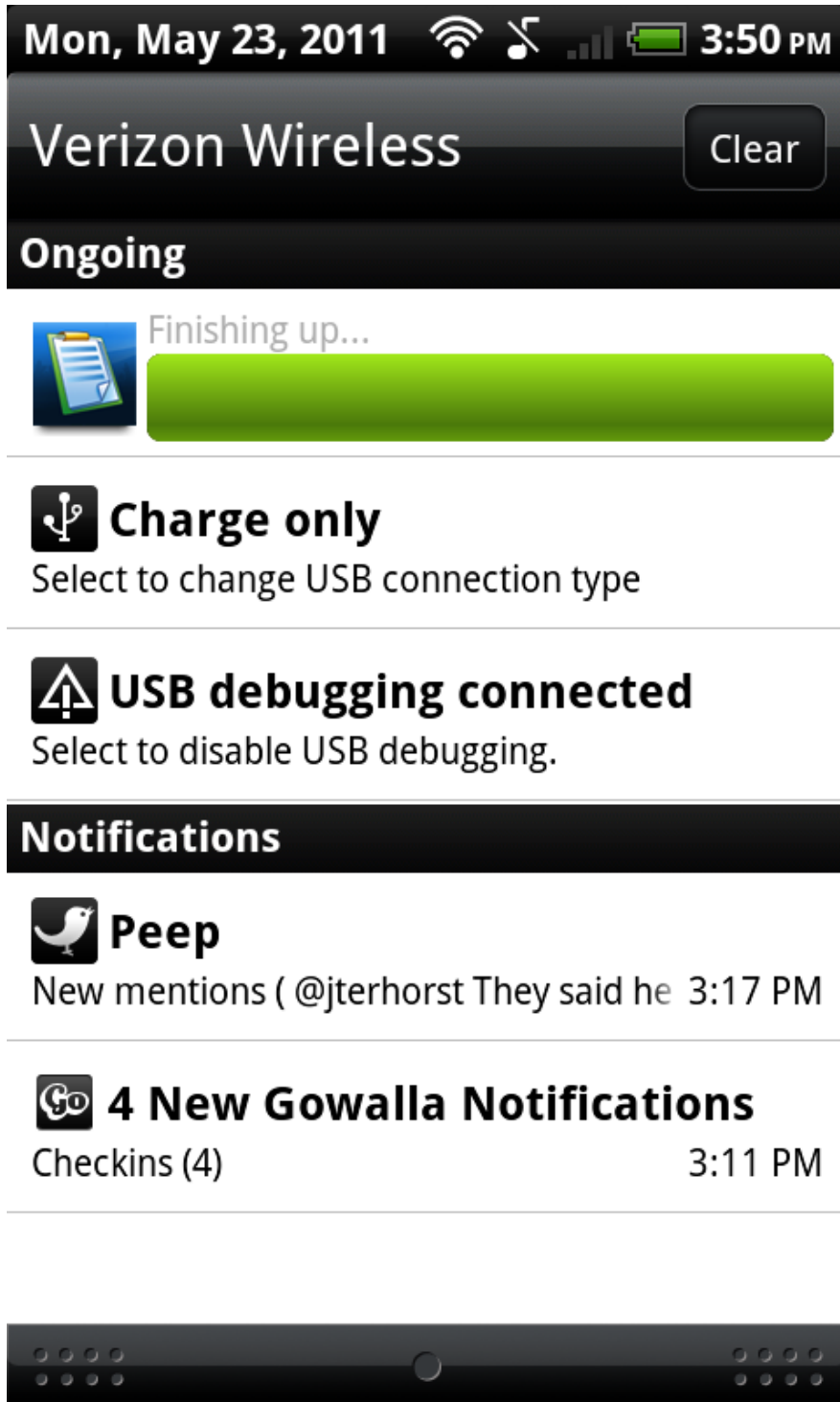
From the App, you can view services, songs, media, and people (of course, all that depending on your permissions). Use our easy buttons at the bottom to go to the last page or the next page, to refresh, or to exit out.

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

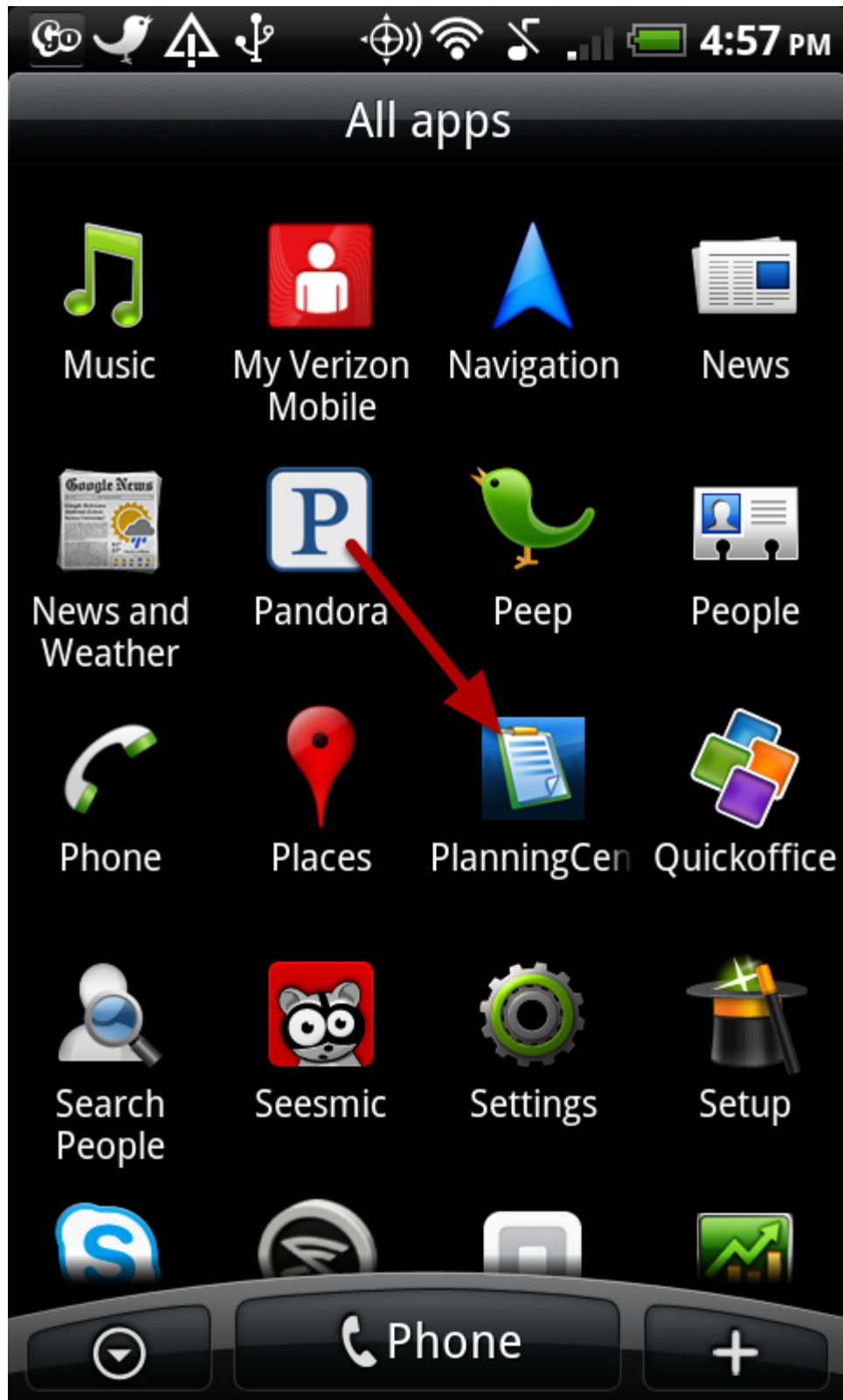
Download the app from the Android Market



You can get the app at:

<https://market.android.com/details?id=com.ministrycentered.PlanningCenter>

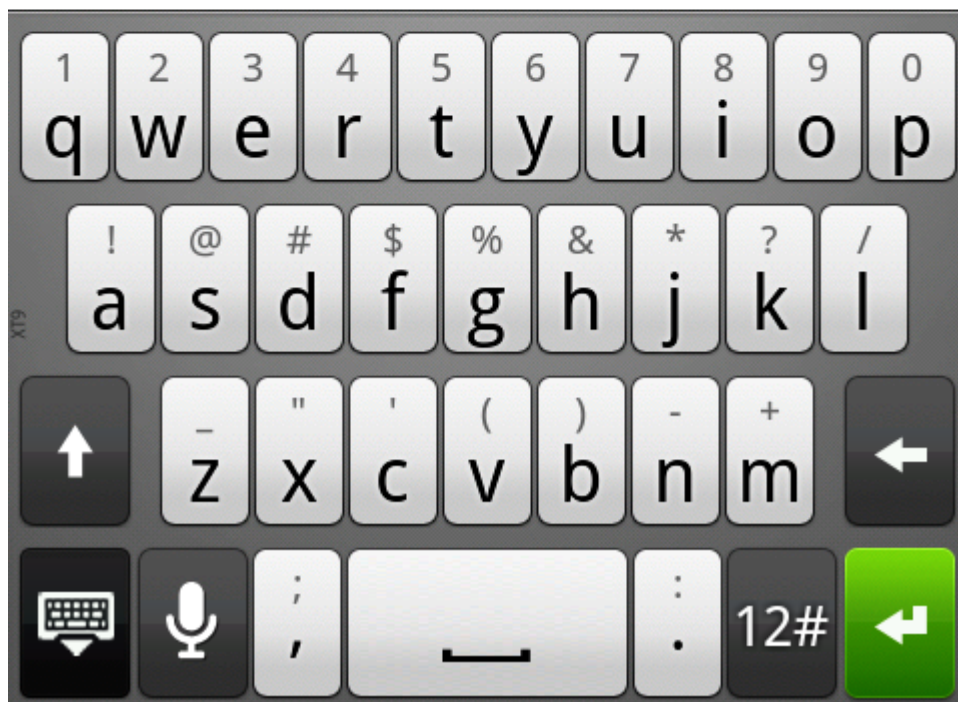
Tap the app on your dashboard to open it



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

e-mail
jason@ministrycentered.com
password
Login
[forgot password?](#)

[Access Regular Planning Center Site](#)



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.

The screenshot shows a music player interface. At the top, a black bar contains a document icon and the text "Downloading...". Below this, the song title "100 Years" and artist "Five for Fighting" are displayed. The song's length is 4:00 and its key is G. The speed is set to 3. Medium and the style is 1. Rock. A "Schedule" section shows the date "February 27, 2011" with a right-pointing arrow and the text "Servicios de Pre-Lanzamiento". Below this is a "Five for Fighting Attachments" section with a right-pointing arrow. Underneath are two more items: "100 Years.MUS" and "View in AmazonMP3 Store", both with right-pointing arrows. A "G Attachments" section follows, containing "100 Years.mp3" and "100 years.pdf", both with right-pointing arrows. A dark grey tooltip with the text "Starting download..." is positioned over the "100 Years.mp3" item. At the bottom, a blue footer bar contains the text "© 2008 Ministry Centered Inc." followed by links for "Logout", "Regular Site", and "Regular".

Downloading...

100 Years
Five for Fighting

Length: 4:00
Keys: G

Speed: 3. Medium
Style: 1. Rock

Schedule

February 27, 2011 >
Servicios de Pre-Lanzamiento

Five for Fighting Attachments

100 Years.MUS >

View in AmazonMP3 Store >

G Attachments

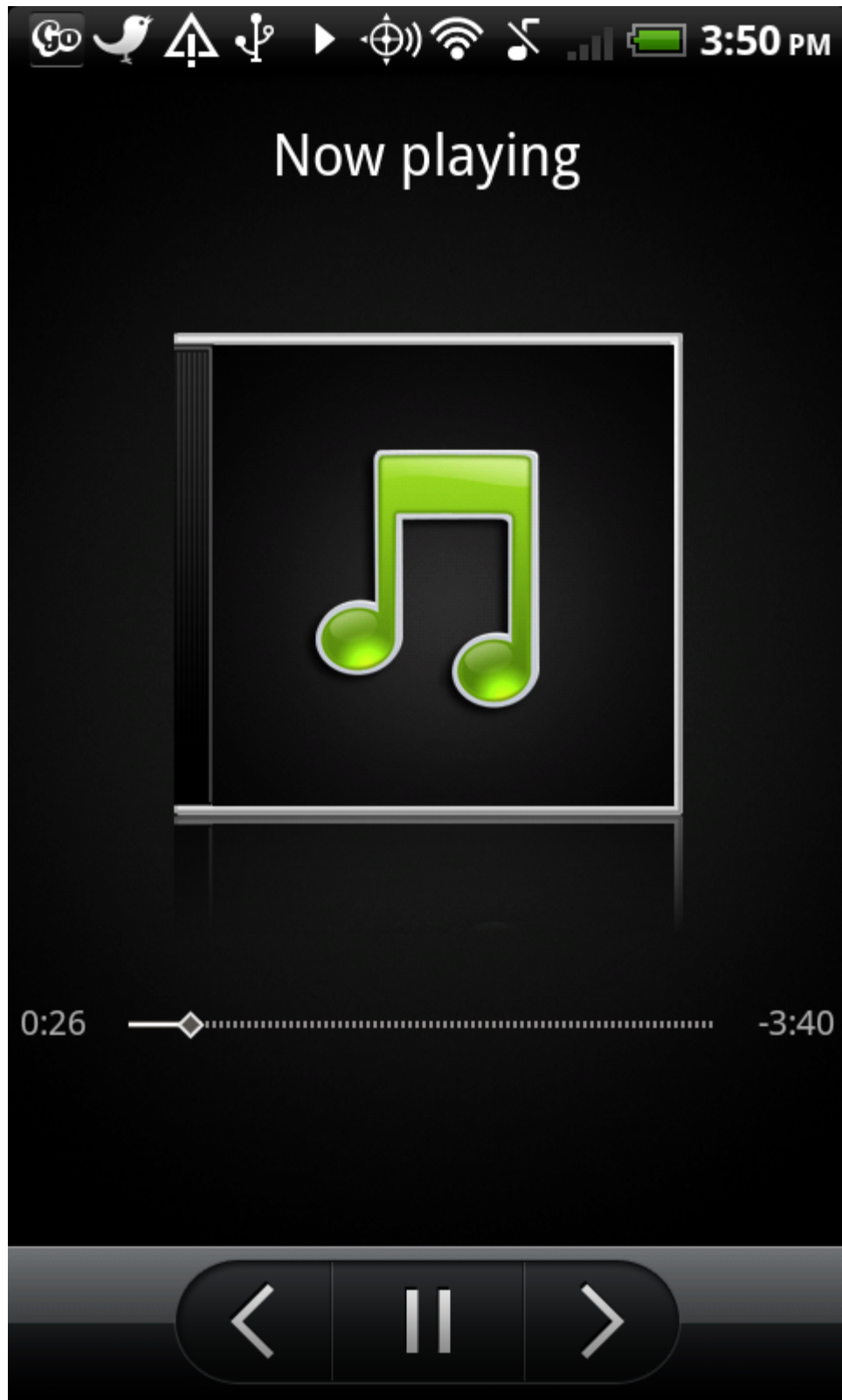
100 Years.mp3 >
Starting download...

100 years.pdf >

© 2008 Ministry Centered Inc. [Logout](#) [Regular Site](#) [Regular](#)

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

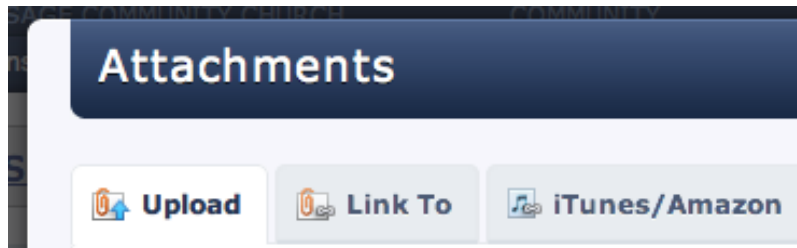
Click Add an Attachment



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.

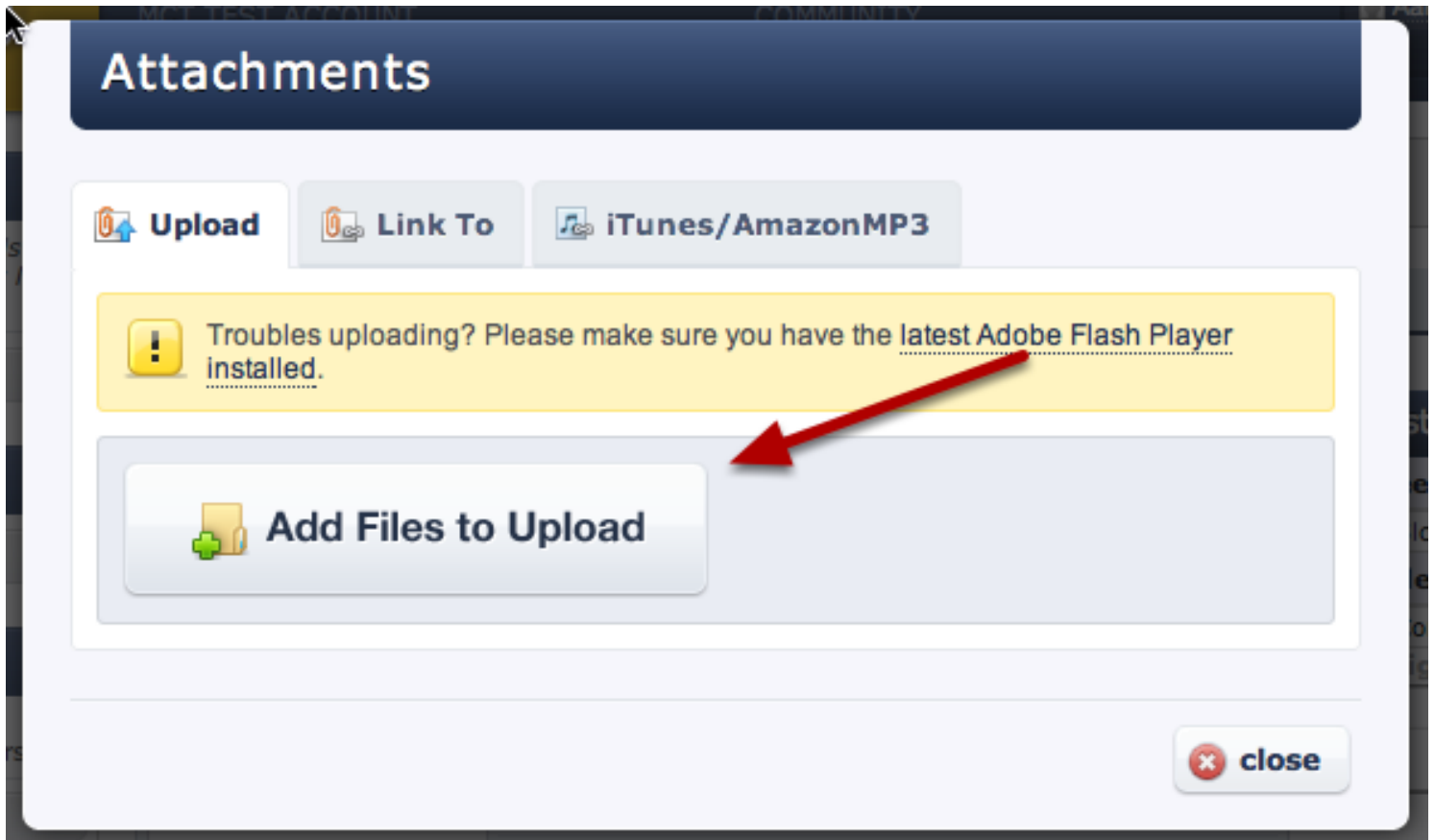
Click Add an Attachment

 Add an attachment

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

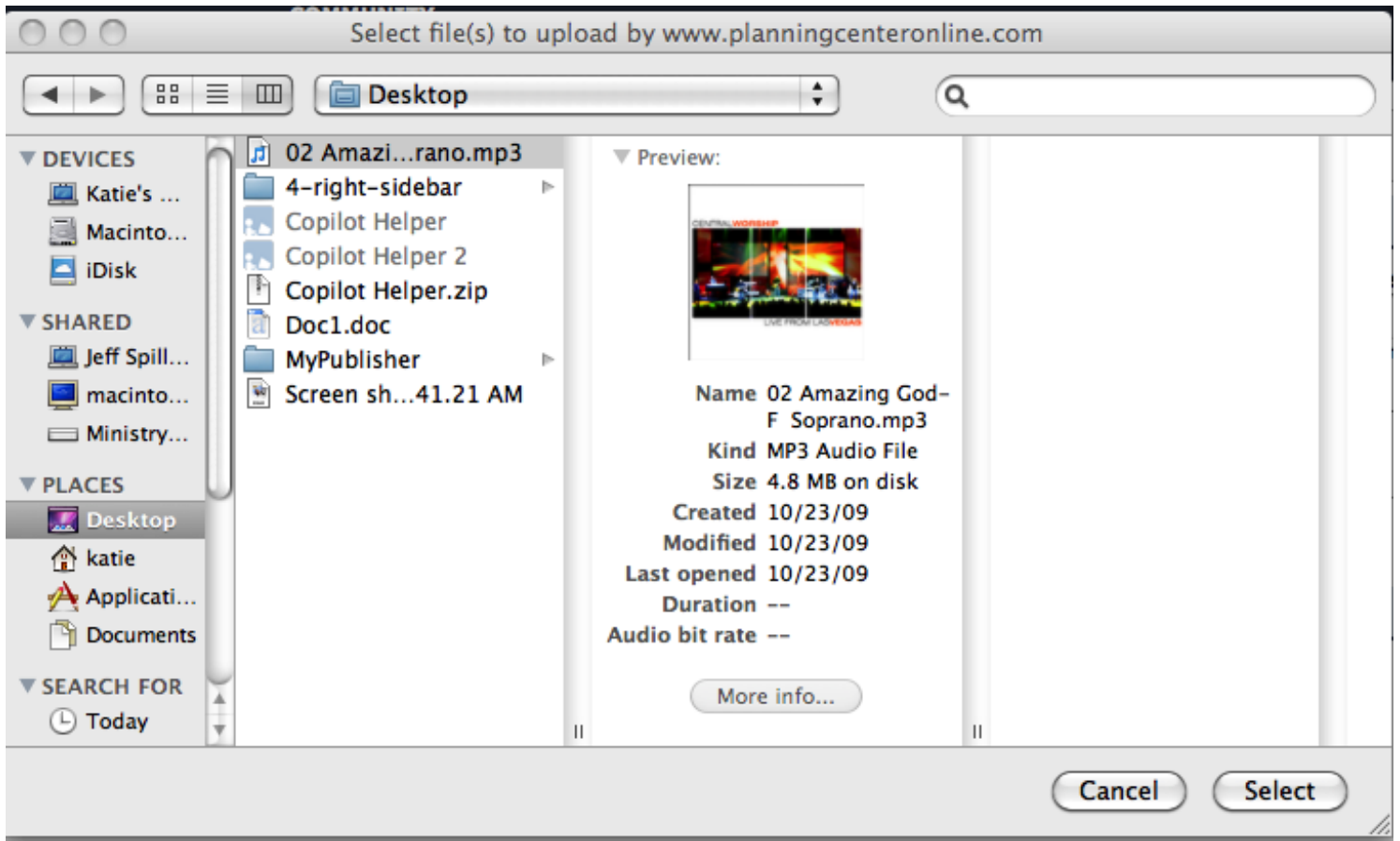
- [Songs](#)
- Plan Items
- Plans
- Service Types
- [Media](#)

Click Add Files to Upload



The screenshot shows a dialog box titled "Attachments". At the top, there are three buttons: "Upload", "Link To", and "iTunes/AmazonMP3". Below these buttons is a yellow warning banner with a yellow exclamation mark icon and the text: "Troubles uploading? Please make sure you have the latest Adobe Flash Player installed.". Below the warning banner is a large button labeled "Add Files to Upload" with a folder icon and a green plus sign. A red arrow points from the warning banner to the "Add Files to Upload" button. In the bottom right corner of the dialog box, there is a "close" button with a red 'x' icon.

Choose the file from your computer then click Select



Click Start File Upload

Attachments

Upload **Link To** **iTunes/AmazonMP3**

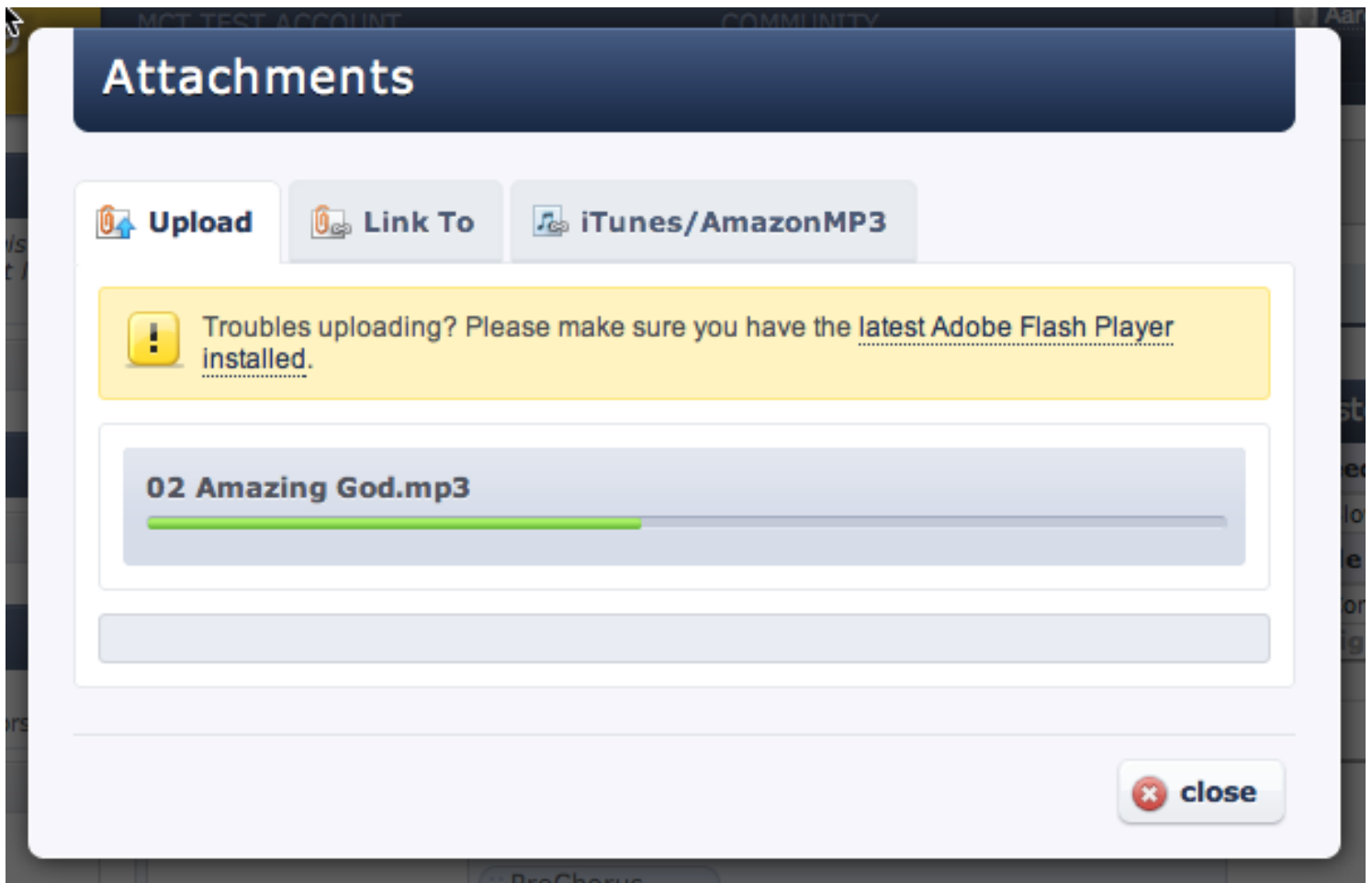
Troubles uploading? Please make sure you have the [latest Adobe Flash Player installed.](#)

02 Amazing God.mp3

Add Files to Upload **Start File Upload**

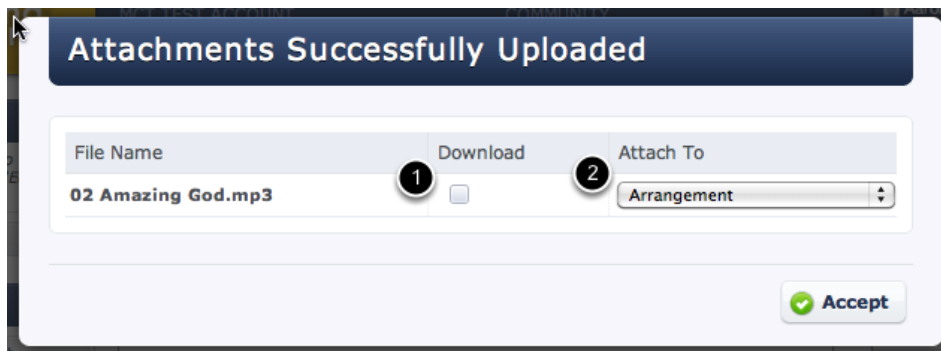
close

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.

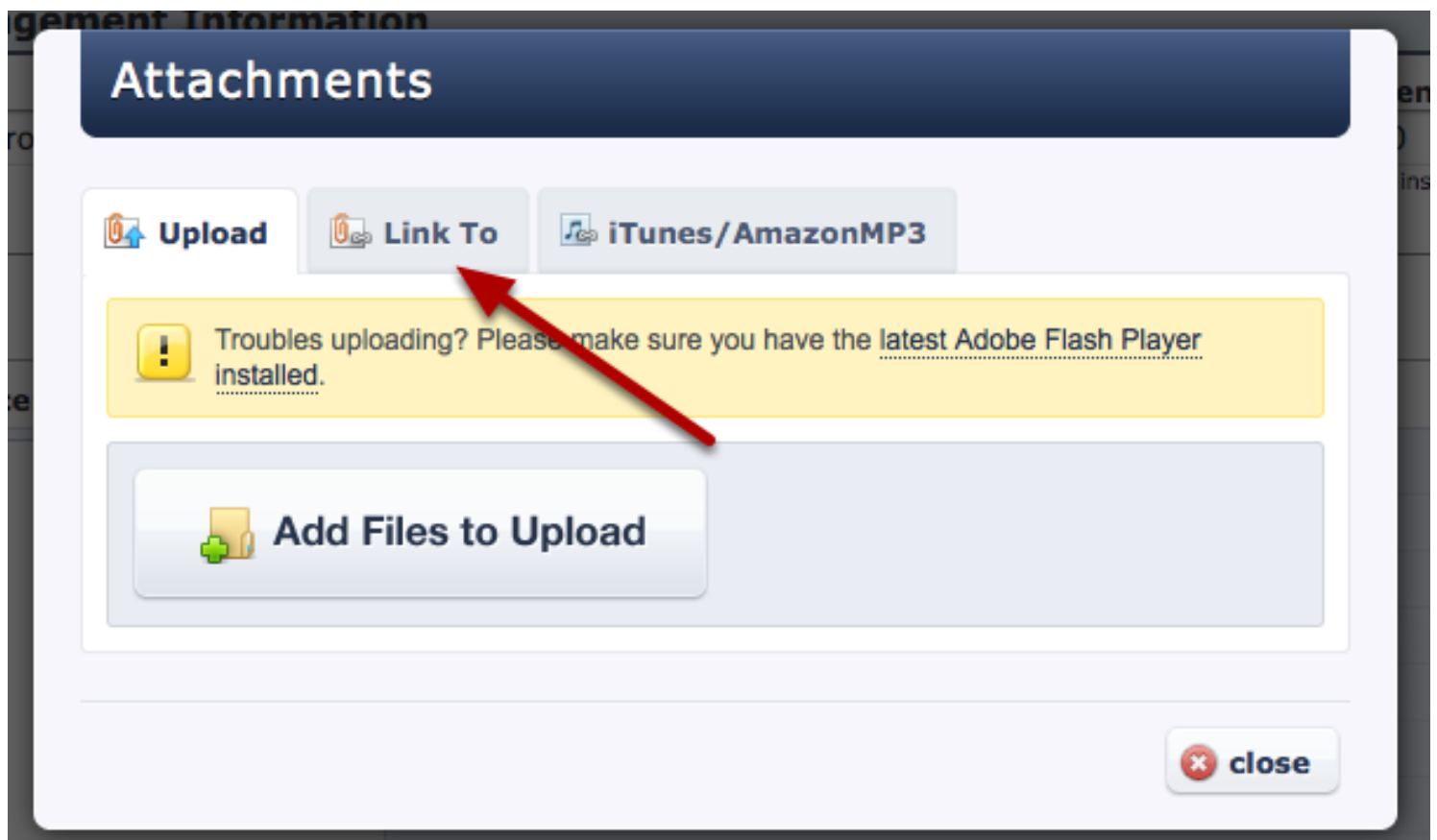
Click 'Add an attachment'

 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



The screenshot shows a dialog box titled "Attachments" with a dark blue header. Below the header are three tabs: "Upload", "Link To", and "iTunes/AmazonMP3". The "Link To" tab is selected and highlighted with a red arrow. Below the tabs is a yellow warning box with an exclamation mark icon and the text: "Troubles uploading? Please make sure you have the [latest Adobe Flash Player installed.](#)". Below the warning box is a large button labeled "Add Files to Upload" with a folder icon and a green plus sign. In the bottom right corner of the dialog box is a "close" button with a red 'x' icon.

Attachments

 Upload  Link To  iTunes/AmazonMP3

Please paste your link below:

1


i.e. http://www.myfiles.com/files/song.mp3

File Name:

2

3 Attached To:

4 Attachment Types:

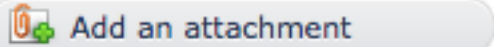
 **Accept** [cancel](#)

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 [Attachment Types](#) feature to link specific files with specific features, set the Attachment Type here.

Linking to iTunes or AmazonMp3

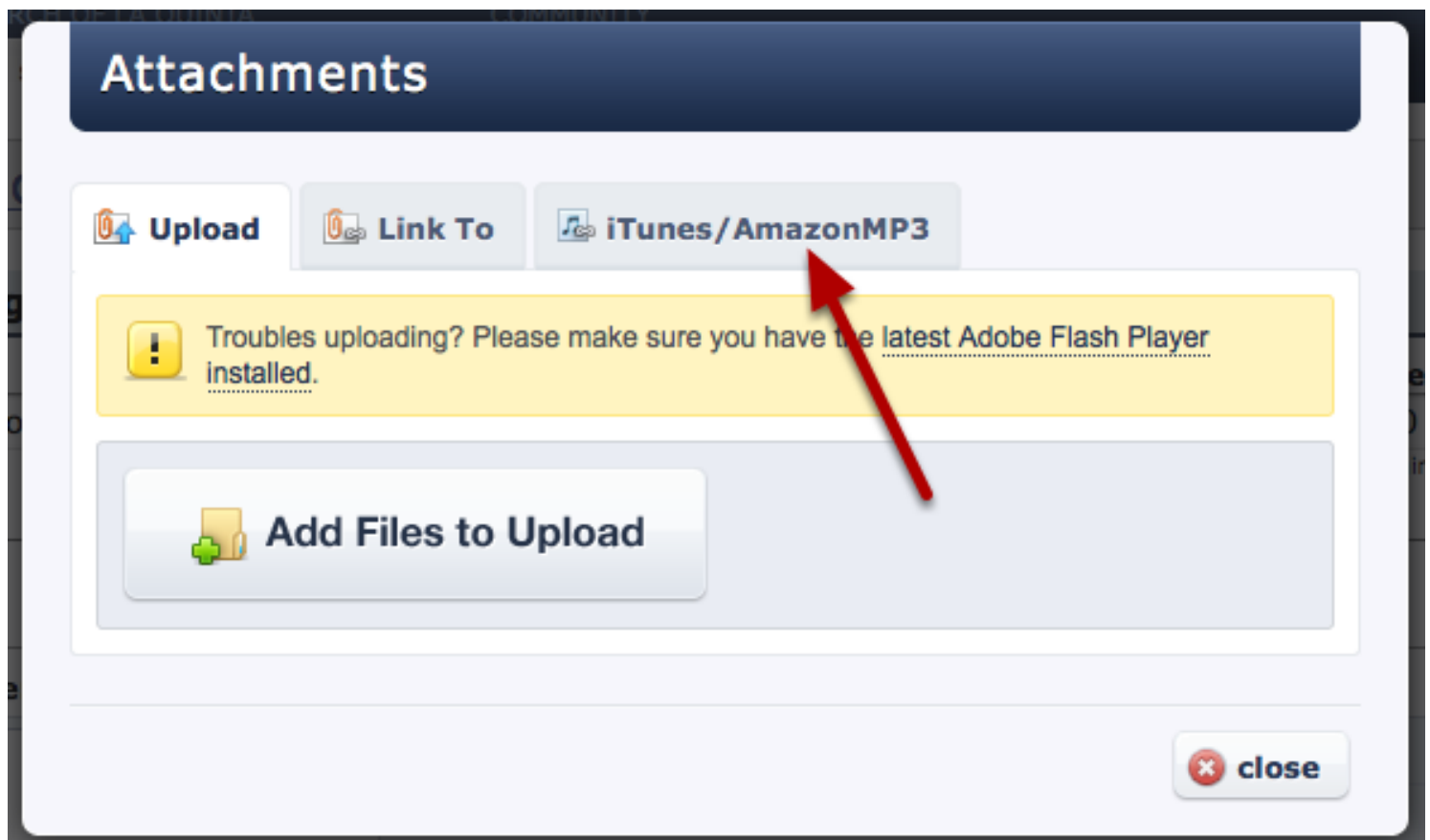
Learn how to easily add links to songs on iTunes or AmazonMp3.

Click 'Add an attachment'

 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



The screenshot shows a dialog box titled "Attachments" with a dark blue header. Below the header are three tabs: "Upload", "Link To", and "iTunes/AmazonMP3". A red arrow points to the "iTunes/AmazonMP3" tab. Below the tabs is a yellow warning box with an exclamation mark icon and the text: "Troubles uploading? Please make sure you have the latest Adobe Flash Player installed." Below the warning box is a large button labeled "Add Files to Upload" with a folder and plus icon. In the bottom right corner of the dialog box is a "close" button with a red 'x' icon.

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

The screenshot shows a web interface titled "Attachments". At the top, there are three tabs: "Upload", "Link To", and "iTunes/AmazonMP3". Below the tabs is a search bar containing the text "Be Thou My Vision". To the right of the search bar are two buttons: "iTunes" (highlighted in blue) and "AmazonMP3". A circled "1" is placed above the "iTunes" button. Below the search bar is a list of five search results, each with an "iTunes" icon, a small album cover, the song title "Be Thou My Vision", and the artist name. To the right of each result is a button labeled "link to this iTunes Song". A circled "2" is placed above the "link to this iTunes Song" button for the second result. At the bottom of the list is a "Next" button with a right-pointing arrow and a circled "3" above it. In the bottom right corner of the interface is a "close" button with a red 'x' icon.

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 requires 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 ocured 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

essfully removed.

My Campus

/Main Campus

PLANS view all plans

SERIES TITLE	PLAN TITLE
4 & 5, 2011	
0, 2011	
7, 2011	matrix
4, 2011	
011	

TOOLS

create a new plan matrix reports

link to an attachment upload

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

planning center					email these people		print	+	Load A Plan
Songs	Media	People	Weekend Worship Services La Quinta/Main Campus February 10, 2011	Weekend Worship Services La Quinta/Main Campus February 17, 2011	Weekend Worship Services La Quinta/Main Campus February 24, 2011	Weekend Worship Services La Quinta/Main Campus March 3, 2011			
▼ Plan Details									
Series Title									
Plan Title									
▼ Order Of Service ✎ Edit Item Descriptions									
	Template Item Test	33:00	Template Item Test	33:00	Template Item Test	33:00	Template Item Test	33:00	
	Text	0:00	test video	3:21	Amazing God	3:45	Central Worship in D		
	Test test	0:00							
	A Mighty Fortress Is Our God Default Arrangement in C	0:00							
	Agnus Dei Default Arrangement in A - A	0:00							
	test	0:00							
	Above All Default Arrangement	0:00							
	Check	0:00							
	add an item	33:00	add an item	33:00	add an item	36:21	add an item	36:45	
▶ Plan Notes									
Audio/Visual									
Band									
Vocals									
▶ Audio/Visual 11AM									
▼ Audio/Visual 9AM									
Audio		Jenn Cole		Reagan-Helms					
Camera	Aaron Stewart	1 person needed		Jeff Berg					
Camera 1	1 person needed					1 person needed			
Lights									

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

email these people print + Load A Plan

Worship Services Main Campus 2011

Weekend Worship Services La Quinta/Main Campus March 3, 2011

Weekend Worship Services La Quinta/Main Campus March 10, 2011

Choose Plans

Weekend Worship Services Back

- East Valley Campus
- La Quinta/Main Campus
- Southwest Campus

Template Item Test 33:00

test video 3:21

An... 36:21

+ add an item

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.

Weekend Worship Services La Quinta/Main Campus March 3, 2011


print

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:

 People	Weekend Worship Services La Quinta/Main Campus February 3, 4 & 5, 2011	Weekend Worship Services La Quinta/Main Campus February 17, 2011
▼ Plan Details		
Series Title		
Plan Title		
▶ Order Of Service		
▶ Plan Notes		
▶ Audio/Visual 11AM		
▶ Audio/Visual 9AM		
▶ Choir		
▶ Instruments Played		

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.

Plan Notes

Audio/Visual 11AM

Audio/Visual 9AM

Audio				
Camera				1 person needed
Camera 1				
Lights				
Producer	Aaron Stewart			
Sound				
Video Switcher				

Choir

Instruments Played

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'

email these people print + Load A

Weekend Worship Services La Quinta/Main Campus February 24, 2011	Weekend Worship Services La Quinta/Main Campus March 3, 2011	Weekend Worship Services La Quinta/Main Campus March 10, 2011
---	---	--

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

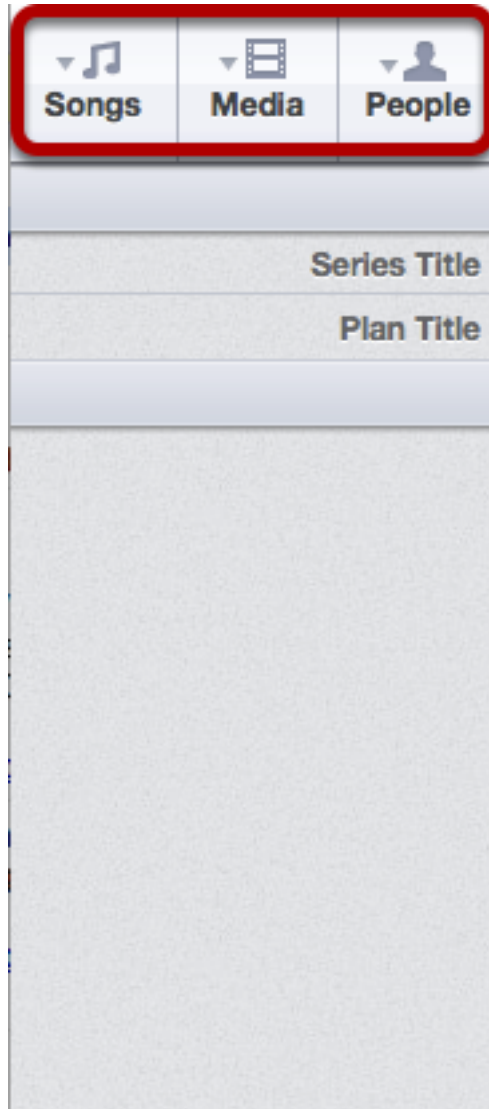
individual date, but it will cut back on the number of emails being sent to their inbox.

For more information on emailing your people, see our lesson on [Sending Notification Emails](#).

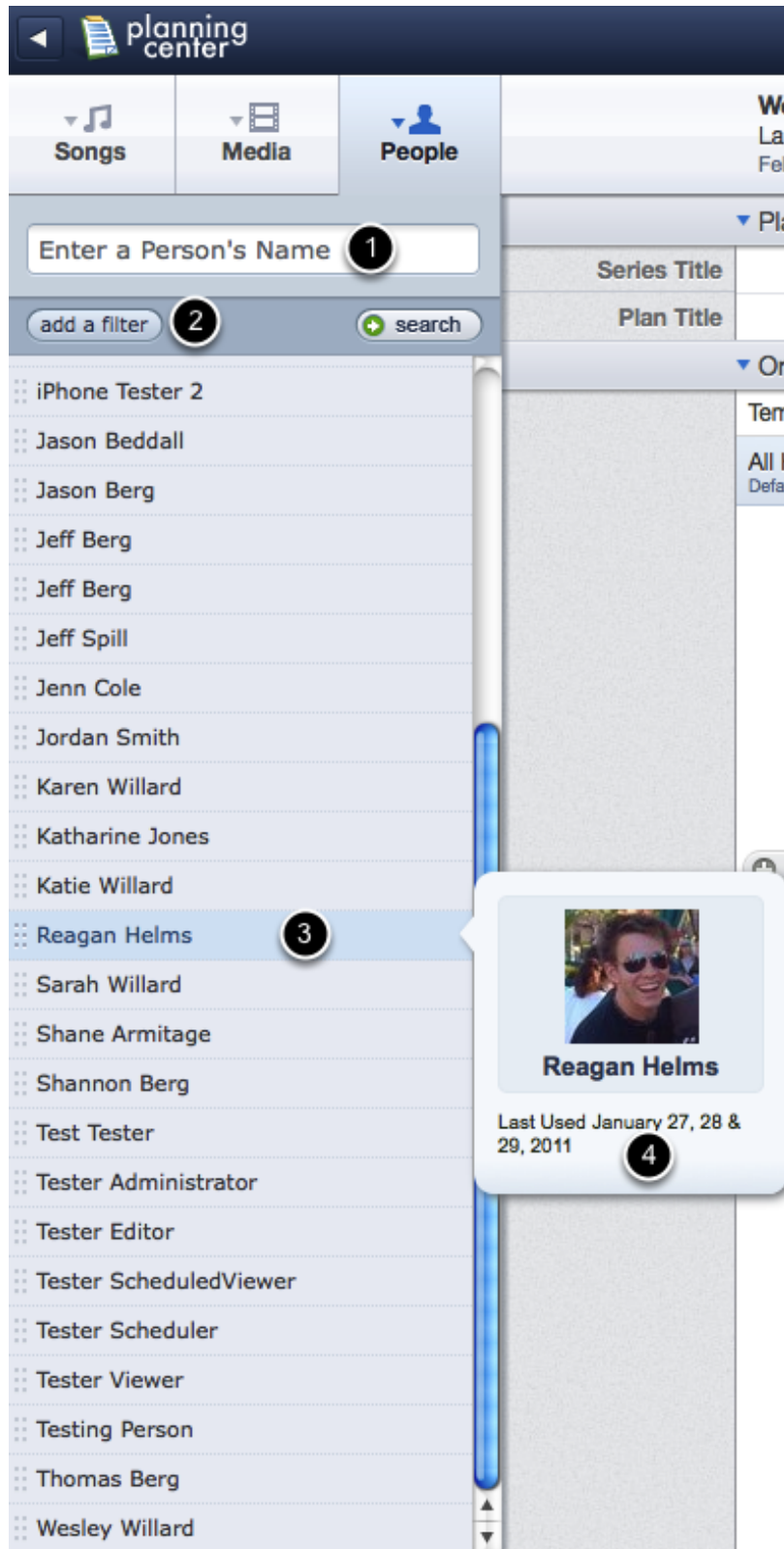
Using the Matrix Libraries Sidebar

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

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

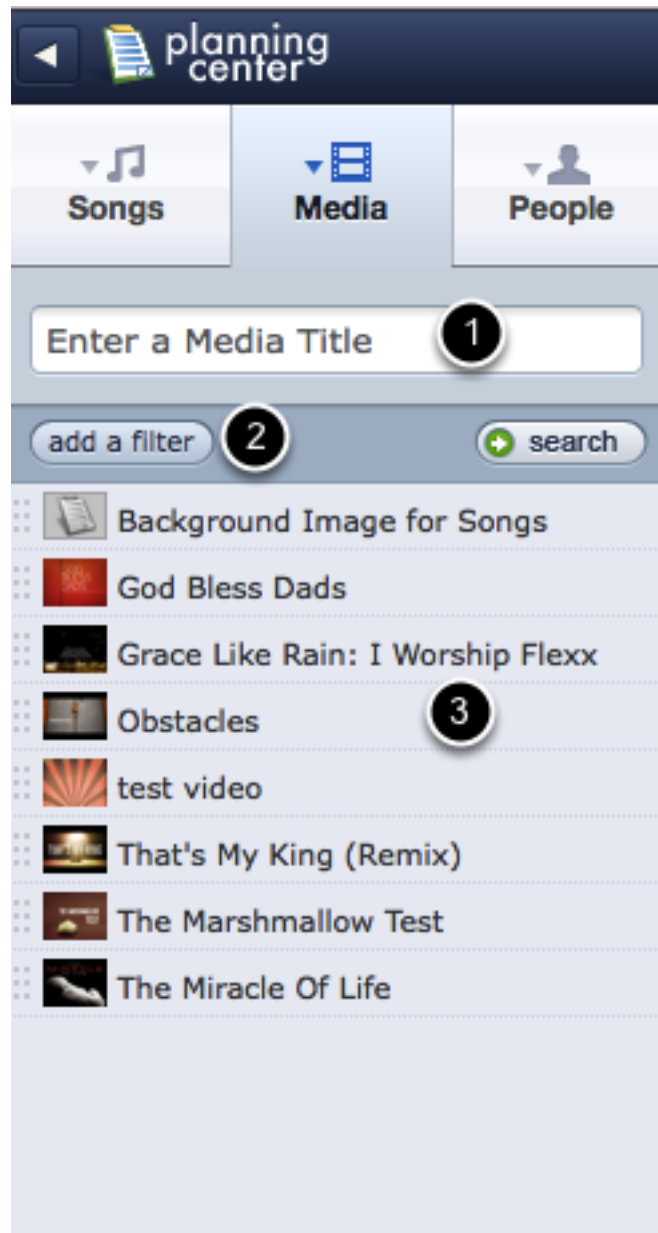


1. Search for a song title by name.
2. Filter your songs by song property, arrangement property, key property or a combination.
3. View song details, arrangements and keys by hovering over them. You can click and drag any

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.

 Weekend Worship Services 

 matrix  create a folder  cre

 East Valley Campus 

UPCOMING PLANS view all plans	SERIES TITLE	PLAN TITLE	
May 27, 2011			15 c
June 3, 2011			about 4 hr
June 10, 2011			about 3 hr
June 17, 2011			about 3 hr
June 24, 2011			about 3 hr
July 1, 2011			15 c
July 8, 2011			15 c
July 15, 2011			2 c

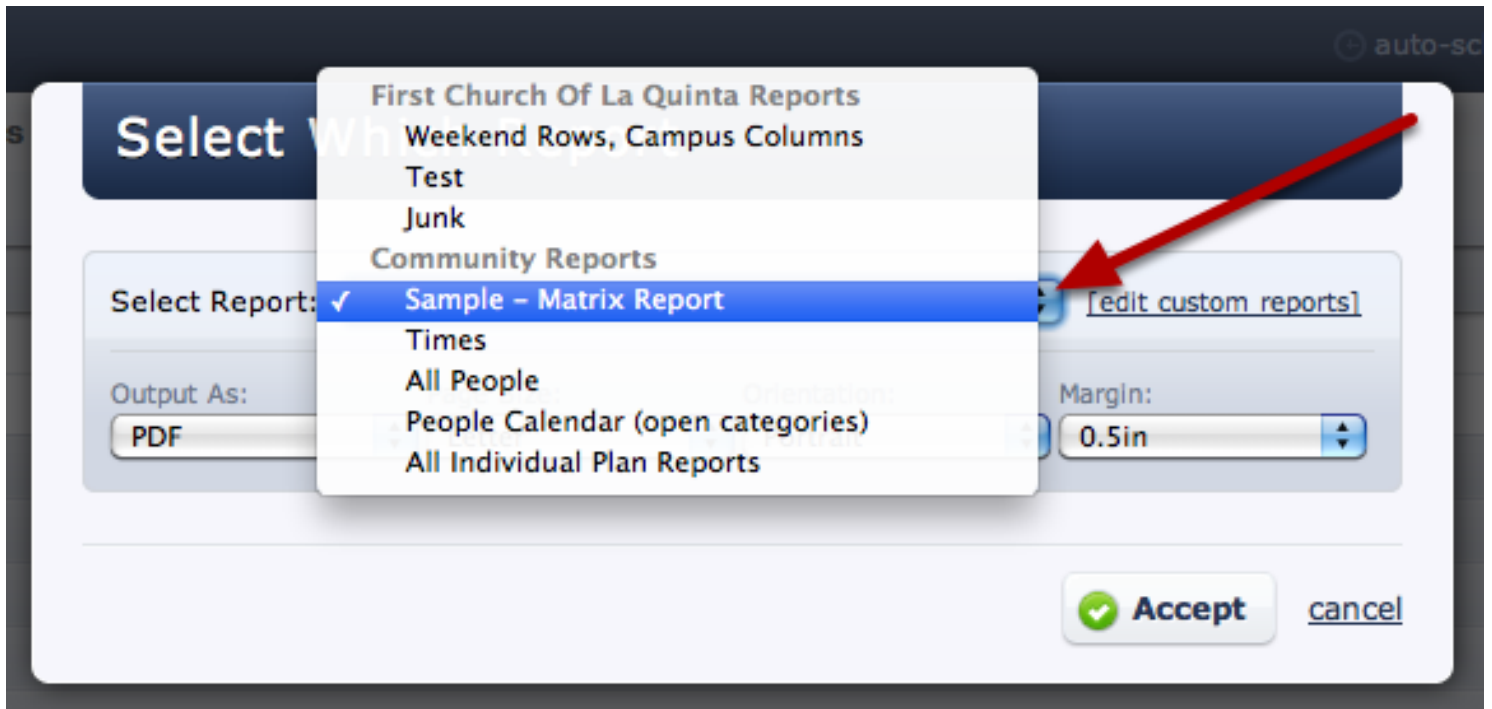
Once dates are loaded, click 'Print'.

Planning Center  auto-schedule  email these people  print  Load A Plan

Media	People	Weekend Worship Services East Valley Campus June 3, 2011	Weekend Worship Services East Valley Campus June 10, 2011	Weekend Worship Services East Valley Campus June 17, 2011	Weekend Worship Services East Valley Campus June 24, 2011
Plan Details					
Series Title					
Plan Title					
▶ Order Of Service 					
▶ Plan Notes					
▶ Audio/Visual 11AM					
▶ Band 11AM					
▶ Band 9AM					
▶ Band					
▶ Choir					
▶ Audio/Visual 9AM					
▶ Vocals					

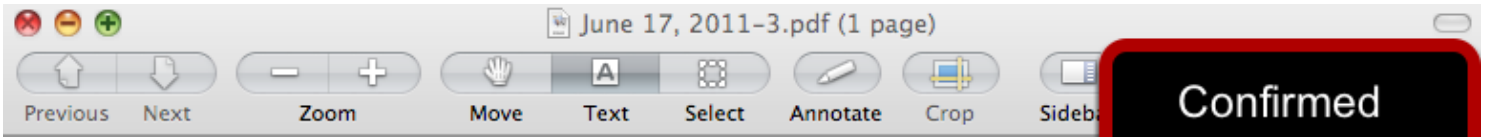
Here you can see I've decided to load all of the plans for my East Valley Campus for June. I'd like to see a few reports for this month so I'm going to click Print and the options will come up for me.

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:



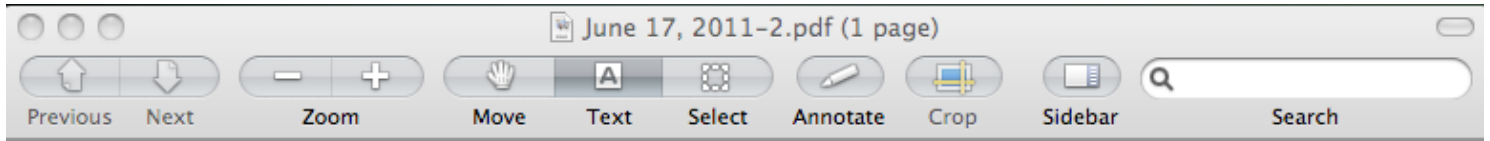
Confirmed People

	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.

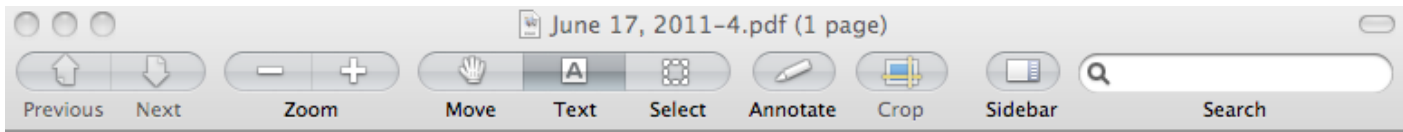
This is what the TIMES report looks like:



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.

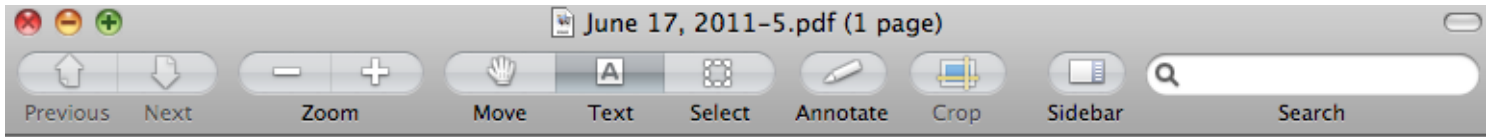
This is what the ALL PEOPLE report looks like:



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 <i>Camera 1</i> Jeff Berg <i>Camera 2</i>	Karen Willard <i>Camera 1</i> Jeff Berg <i>Camera 2</i>	Karen Willard <i>Camera 1</i>	Karen Willard <i>Camera 1</i> Jeff Berg <i>Camera 2</i>
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 <i>Acoustic Guitar</i> Shannon Berg <i>Bass Guitar</i> Dave Petrie <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Reagan Helms <i>Keys</i> Ashley Tallungan <i>Piano</i>	Jeff Spill <i>Acoustic Guitar</i> Shannon Berg <i>Bass Guitar</i> Dave Petrie <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Reagan Helms <i>Keys</i> Ashley Tallungan <i>Piano</i>	Jeff Spill <i>Acoustic Guitar</i> Shannon Berg <i>Bass Guitar</i> Dave Petrie <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Reagan Helms <i>Keys</i> Ashley Tallungan <i>Piano</i>	Jeff Spill <i>Acoustic Guitar</i> Shannon Berg <i>Bass Guitar</i> Dave Petrie <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Reagan Helms <i>Keys</i> Ashley Tallungan <i>Piano</i>
Band 9AM People	Band 9AM People	Band 9AM People	Band 9AM People
Reagan Helms <i>Acoustic Guitar</i> Thomas Berg <i>Acoustic Guitar</i> Tester Editor <i>Bass Guitar</i> Anthony Prochaska <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Wesley Willard <i>Keys</i>	Reagan Helms <i>Acoustic Guitar</i> Thomas Berg <i>Acoustic Guitar</i> Tester Editor <i>Bass Guitar</i> Anthony Prochaska <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Wesley Willard <i>Keys</i>	Reagan Helms <i>Acoustic Guitar</i> Thomas Berg <i>Acoustic Guitar</i> Tester Editor <i>Bass Guitar</i> Anthony Prochaska <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Wesley Willard <i>Keys</i>	Reagan Helms <i>Acoustic Guitar</i> Thomas Berg <i>Acoustic Guitar</i> Tester Editor <i>Bass Guitar</i> Anthony Prochaska <i>Drums</i> Shannon Berg <i>Electric Guitar</i> Wesley Willard <i>Keys</i>
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:

June 17, 2011-6.pdf (page 1 of 5)

East Valley Campus

June 3, 2011

06/03	06/03	Length	Notes
09:00am	11:00am	in mins	
08:50am	10:50am	10:00	Prelude
09:00am	11:00am	3:00	Blessed Be Your Name at bpm
09:03am	11:03am	4:45	Cannons at bpm - Intro, V1, C, V2, C, B, C, C, Outro
09:07am	11:07am	4:00	You're Worthy Of My Praise at bpm

09:11am 11:11am 11:45

Rehearsal Times
05/31 at 07:00pm

Vocals
Band
Leaders

June 17, 2011-6...
2
3
4

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:

Select Which Report

Select Reports: ✓ Weekend Rows, Campus Columns [edit custom reports]

Output As: PDF Margin: 0.5in

- Test
- Junk
- Community Reports
- Sample - Matrix Report
- Times
- All People
- People Calendar (open categories)
- All Individual Plan Reports

Accept cancel

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.

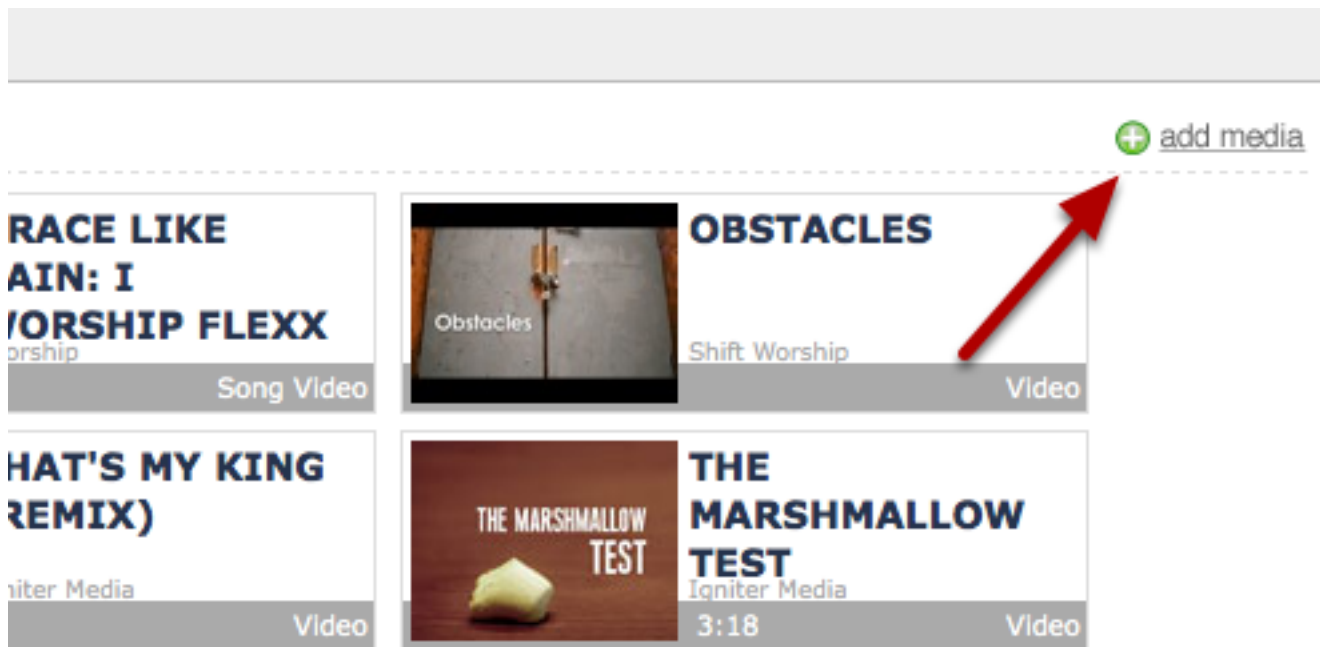
Media

Adding and Uploading Media

Click on the media tab



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



Enter Media information.

The screenshot shows a web form titled "Add Media" with the following fields and callouts:

- 1**: Points to the "Title" text input field.
- 2**: Points to the "Length" section, which includes two input boxes for "mins" (0) and "secs" (0).
- 3**: Points to the "Type:" dropdown menu, which currently shows "Video".
- 4**: Points to the "Creator:" text input field.

Below the form is a green informational message: "Don't have a media of your own to add? That is OK! You can browse our collection of media in the [Community Media Area](#)." At the bottom right, there are two buttons: "Accept" (highlighted with a red circle) and "cancel".

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.


Preview

We will automatically generate a thumbnail & compressed preview once you upload or link an Image or Video to this media.

Attachments

 Add an attachment

Schedule

 View past schedule

Announcements slides

Media Information

Title
Announcements slides

Type: Video **Creator:** Reagan Helms

Themes:

Notes:

[Save](#) [Save & Close](#)

[Privacy Policy](#) | [Terms Of Service](#) | Copyright ©2006-2010 Minist

Organization #96 | User #782024 | Server: MCTI01VM011






This page 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:

First Church Of La Quinta Media [add media](#)

 BACKGROUND IMAGE FOR SONGS Darren Smith 3:00 Background Image	 GOD BLESS DADS PowerPoint Sermons Background Video	 GRACE LIKE RAIN: I WORSHIP FLEXX iWorship Song Video
 THAT'S MY KING (REMIX) Igniter Media Video	 THE MARSHMALLOW TEST Igniter Media 3:18 Video	

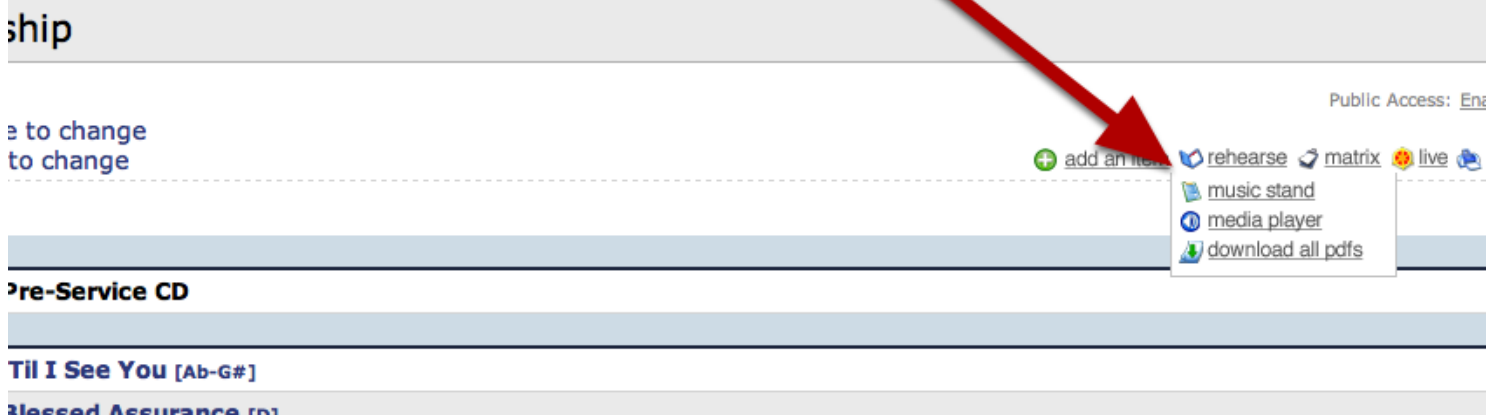
Above is an example of what your media page might look like. I have many different medias, all (except my most recent) with a thumbnail attached.

Music Stand

Using the web-based version.

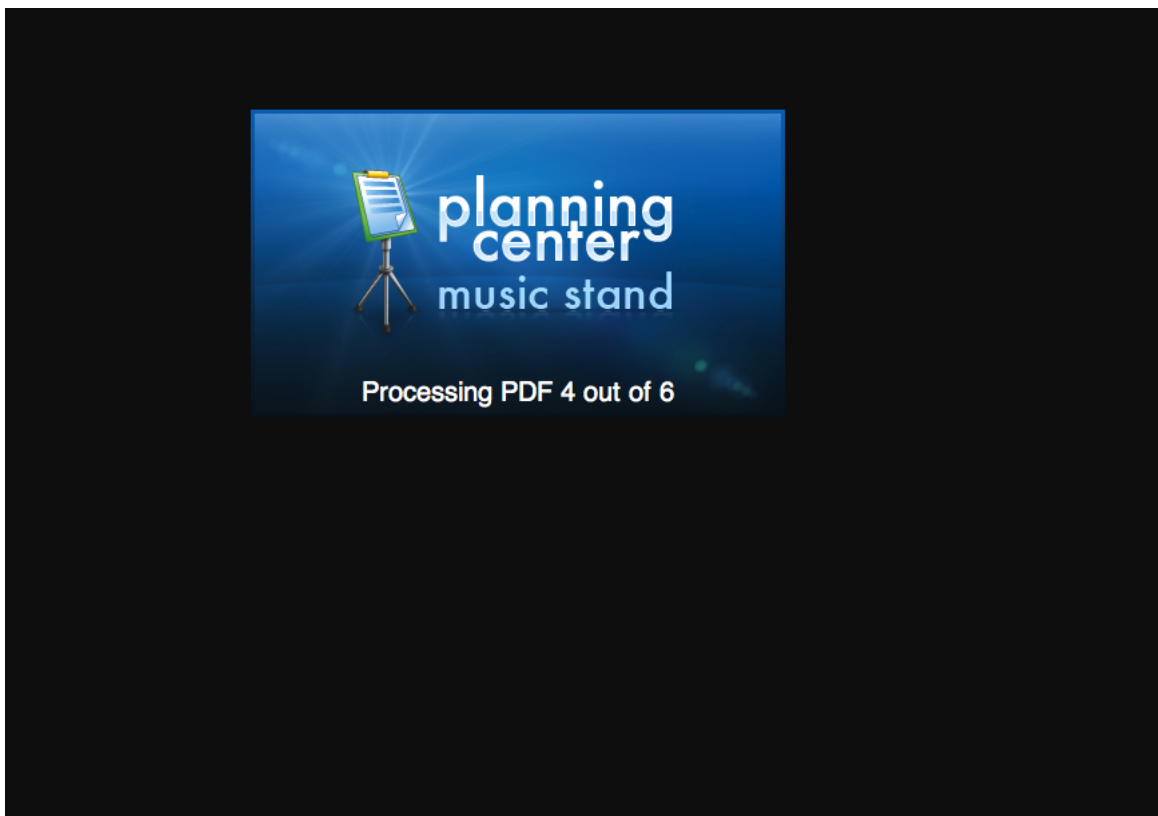
This lesson shows you how to use the web-based version of Music Stand, from within a plan.

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.

The image shows a digital music score for 'Blessed Assurance' by Crosby/Knaapp, split into two pages. The left page is labeled 'Page 1 of 2' and the right page 'Page 2 of 2'. A navigation bar at the bottom features a '1 2' indicator with arrows on either side. A red arrow points from the '1 2' indicator to a 'Click Here' button on the left page. Another red arrow points from the 'Click Here' button on the right page to the '1 2' indicator. A third red arrow points from the 'Click Here' button on the right page to the settings icon in the bottom right corner of the interface.

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

This image is a close-up of the bottom right corner of the digital music score interface. It shows the title 'Blessed Assurance' and two icons: a gear icon representing settings and a double-down arrow icon representing page navigation. A red arrow points from the settings icon to the text above it.

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



Music Stand Settings

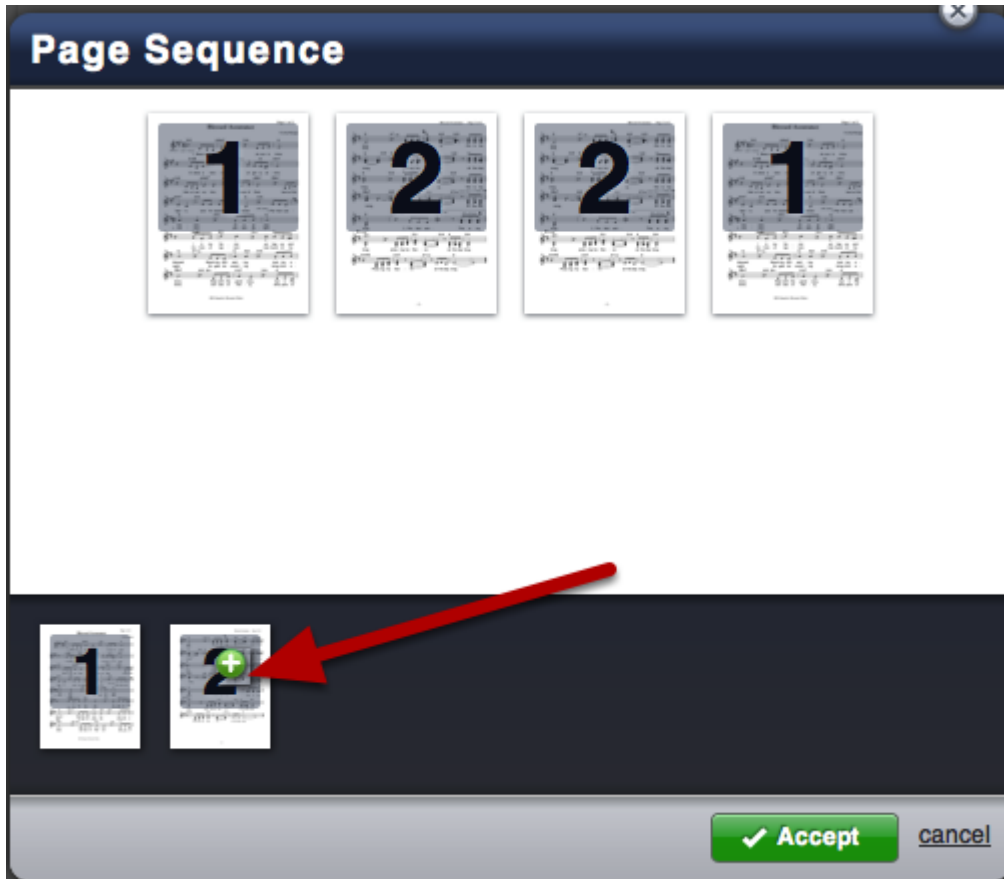
'Til I See You:
TillSeeYou-Ab-G#.pdf

Blessed Assurance:
Blessed Assurance leadsheet with guitar.pdf

Come Now Is The Time To Worship:
ComeNowIsTheTimeToWorship-D.pdf

Amazing God:
Amazing God (lyrics).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.

Music Stand Settings

'Til I See You:

TillSeeYou-G-G.pdf

TillSeeYou-Ab-G#.pdf

Blessed Assurance leadsheet with guitar.pdf

Come Now Is The Time To Worship:

ComeNowIsTheTimeToWorship-D.pdf

Amazing God:

Amazing God (lyrics).pdf

rearrange pages

rearrange pages

rearrange pages

rearrange pages

rearrange pages

✓ Accept

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

my Sav - ior, all the day long.

Blessed Assurance

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.

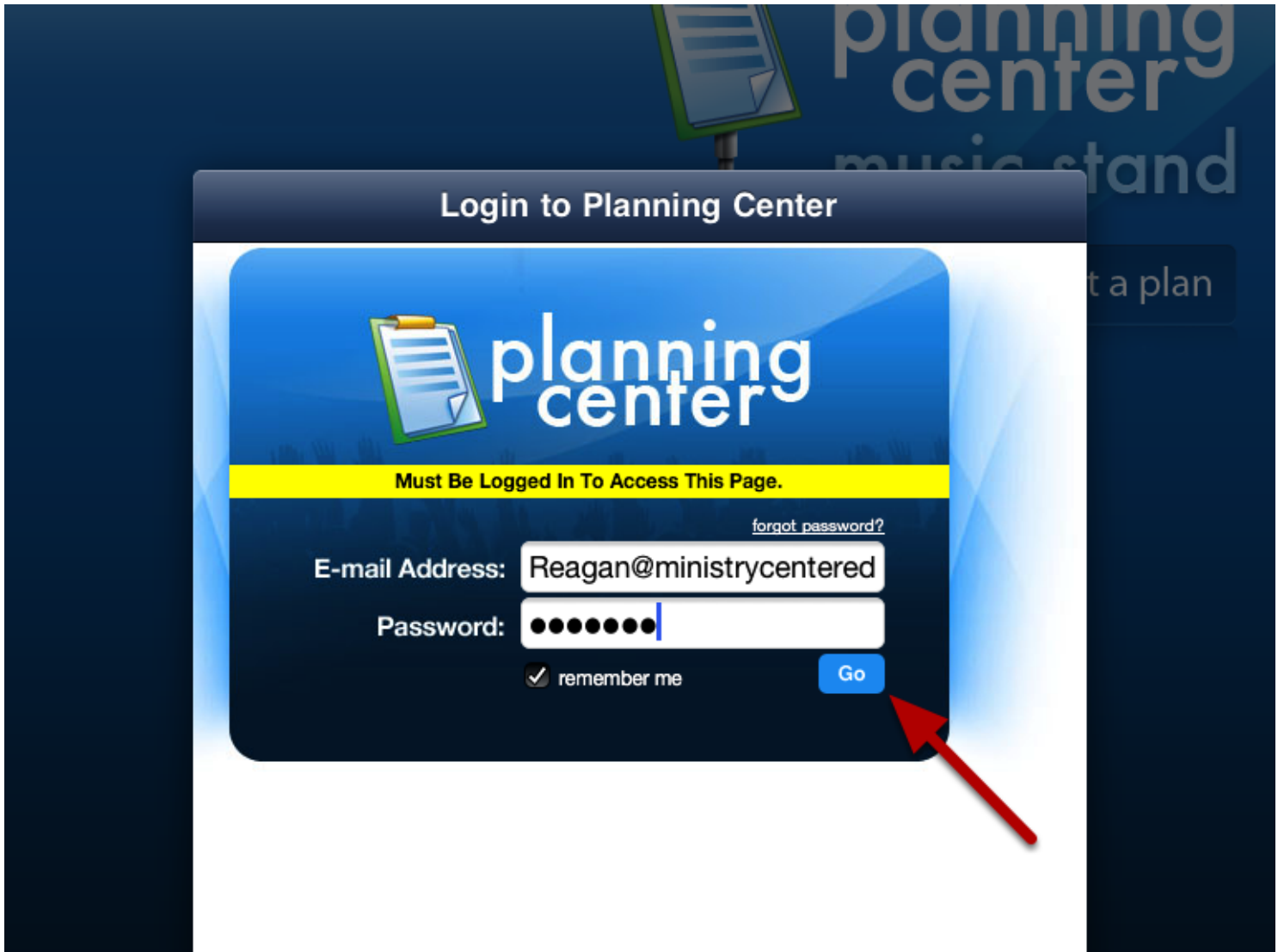
Musical score for the hymn "Praising my Savior, all the day long." The score is written on a single staff in G major (one sharp) and 4/4 time. The lyrics are "Prais-ing my Sav - ior, all the day long." The guitar chords are: D2/F# (first measure), E m7 (second measure), A / sus (third measure), and D (fourth measure). A red arrow points from the right side of the score to a small icon of a clipboard with a document, which is the PCO logo.

iPad Music Stand App

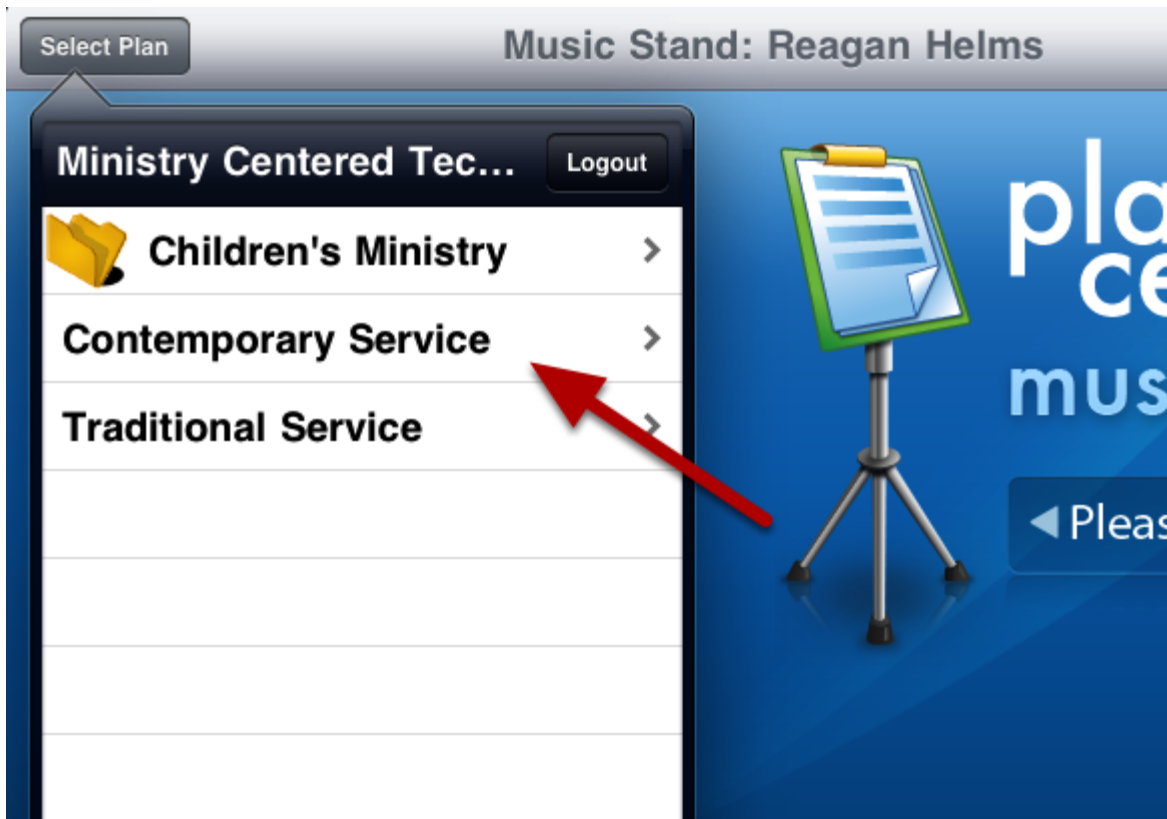
Locate and tap the Music Stand App



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.


Select Plan Music Stand: Reagan Helms [Edit](#)

Contemporary Service

November 18, 2011

Worship Set

0:30	Video Intro
3:30	Your Grace Is Enough Your Grace Is Enough 5057.pdf
4:00	Grace Like Rain
4:00	Cannons CCLI Chart.pdf



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

Select Plan Music Stand: Reagan Helms Finished

Contemporary Service

November 18, 2011

Worship Set

0:30	Video Intro	
3:30	Your Grace Is Enough	Select PDF
	 Your Grace Is Enough 5057.pdf	
4:	<div style="border: 2px solid black; padding: 5px; width: fit-content;"><p>None</p><hr/><p>Cannons-lyrics.pdf</p><hr/><p>Cannons-G.pdf</p></div>	Select PDF
5:00	The Heart Of Worship	

Welcome

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

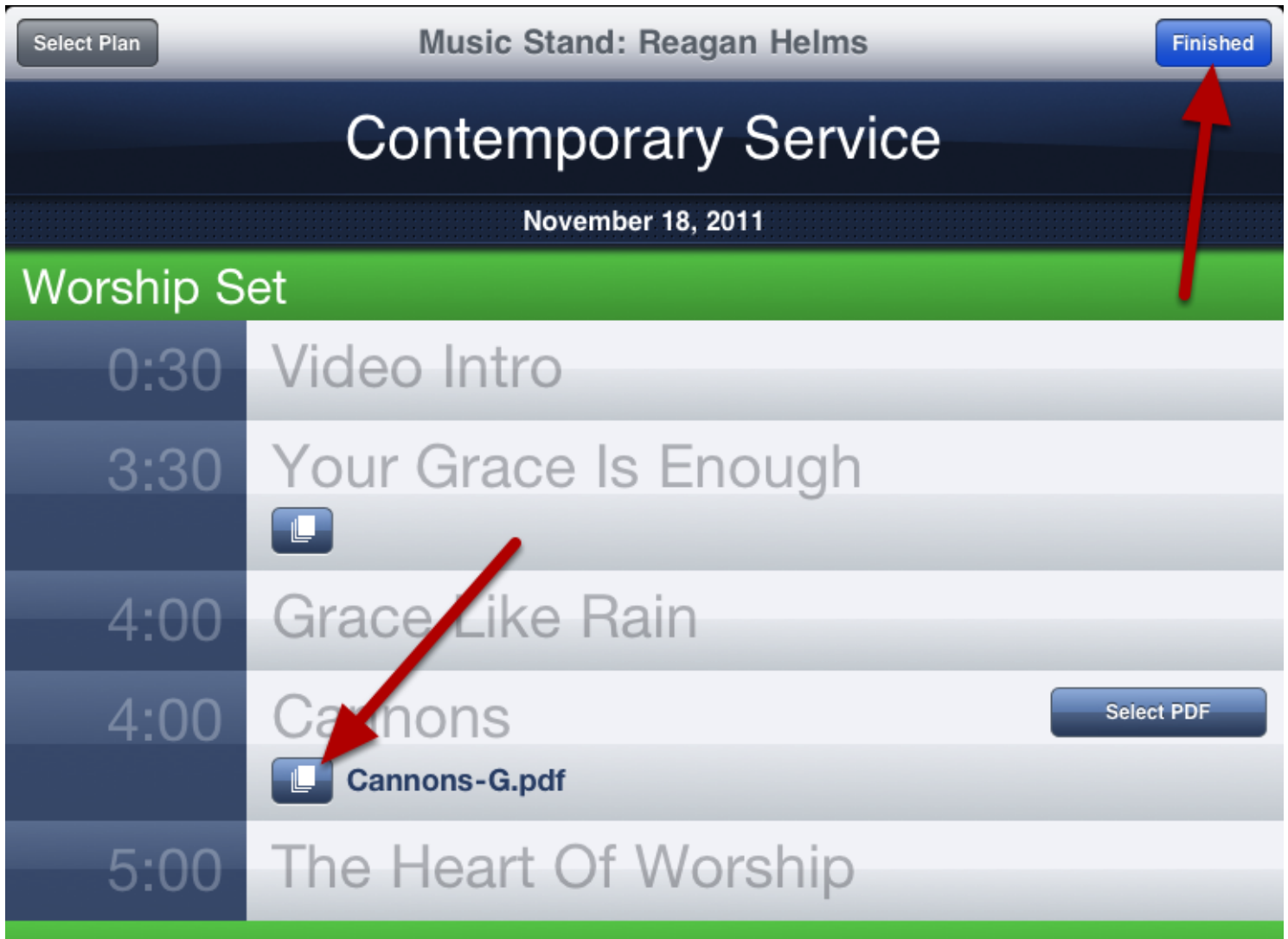
Select Plan Music Stand: Reagan Helms Finished

Contemporary Service

November 18, 2011

Worship Set

0:30	Video Intro
3:30	Your Grace Is Enough
4:00	Grace Like Rain
4:00	Cannons Select PDF
5:00	The Heart Of Worship



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

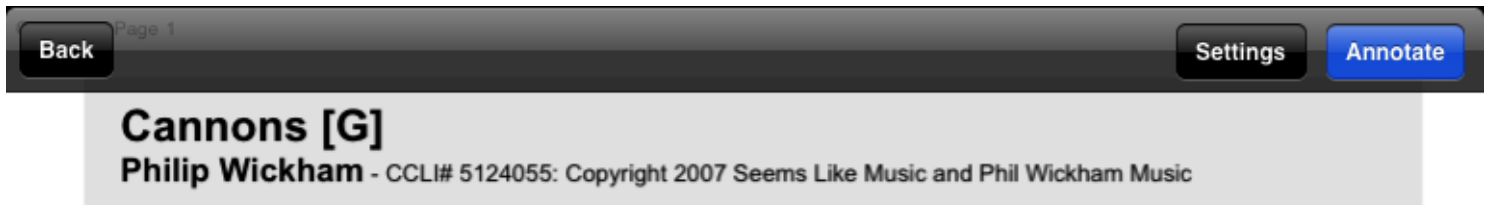
BRIDGE

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

To pull up the options bar, tap the screen.



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

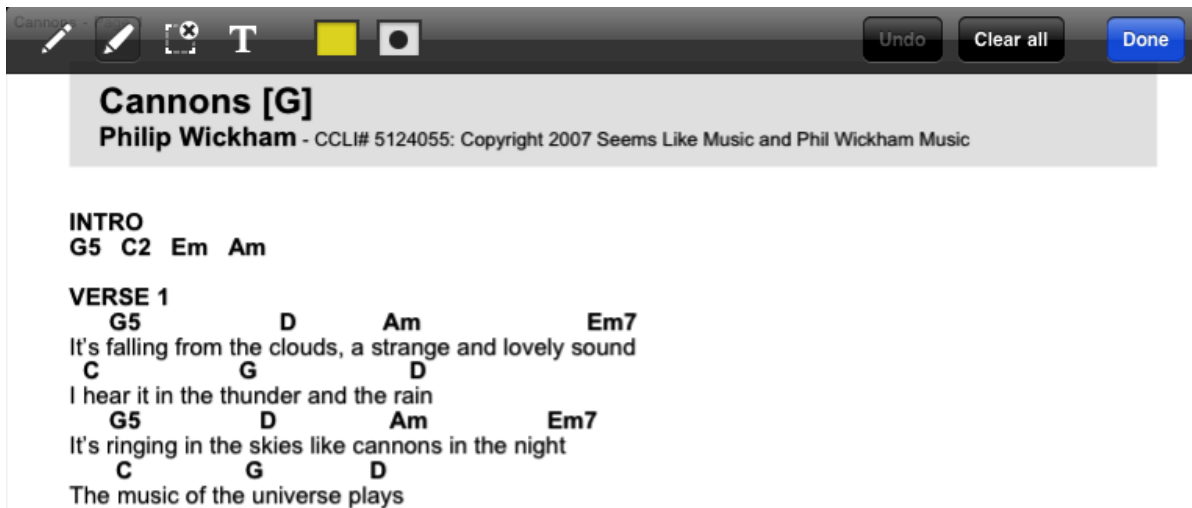
Em D
The music of the universe plays

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 tool 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.

The screenshot shows a music notation application interface. At the top, there's a status bar with 'AT&T', '9:54 AM', and '49%' battery. Below that is a toolbar with icons for pencil, eraser, and text, along with 'Undo', 'Clear all', and 'Done' buttons. The main content area displays the title 'Cannons [G]' and the artist 'Philip Wickham'. The music is organized into sections: INTRO, VERSE 1, CHORUS, INTRO, VERSE 2, and BRIDGE. Annotations include a green scribble labeled '1' over the first chorus, a dashed box labeled '3' over the word 'TEXT' in the bridge, and a yellow highlight labeled '2' over the first line of the bridge. The bridge text is: 'All glory, honor, power is Yours, Amen'.

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

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

1
2
3
TEXT

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

- 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.

Verse 2

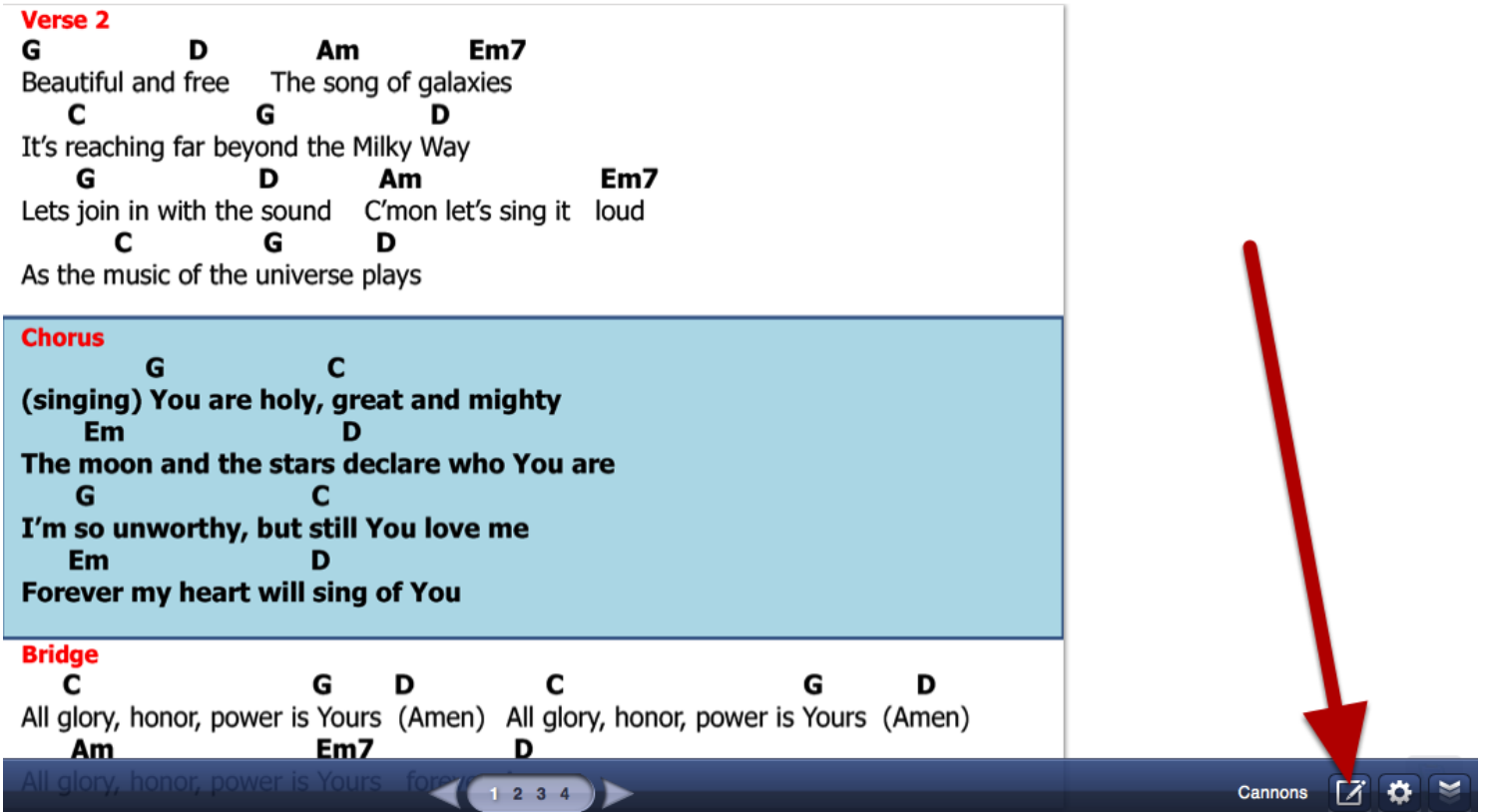
G D Am Em7
Beautiful and free The song of galaxies
C G D
It's reaching far beyond the Milky Way
G D Am Em7
Lets join in with the sound C'mon let's sing it loud
C G D
As the music of the universe plays

Chorus

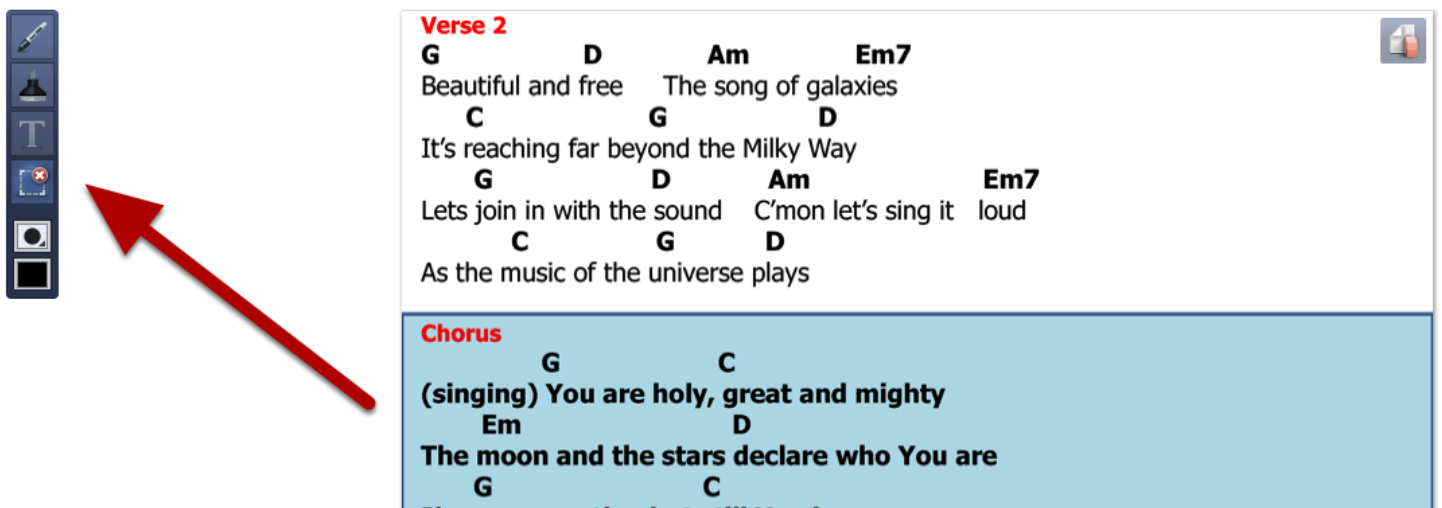
G C
(singing) You are holy, great and mighty
Em D
The moon and the stars declare who You are
G C
I'm so unworthy, but still You love me
Em D
Forever my heart will sing of You

Bridge

C G D C G D
All glory, honor, power is Yours (Amen) All glory, honor, power is Yours (Amen)
Am Em7 D
All glory, honor, power is Yours (Amen)



This will open up your options on the left.



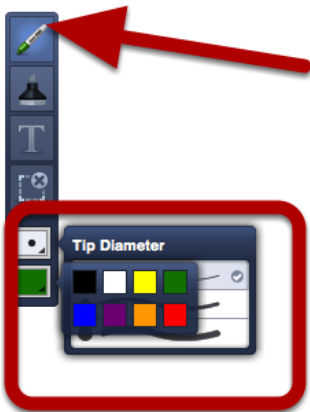
Verse 2

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

Chorus

G C
(singing) You are holy, great and mighty
Em D
The moon and the stars declare who You are
G C
I'm so unworthy, but still You love me

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



Verse 2

G **D** **Am** **Em7**
 Beautiful and free The song of galaxies

C **G** **D**
 It's reaching far beyond the Milky Way

G **D** **Am** **Em7**
 Lets join in with the sound C'mon let's sing it loud

C **G** **D**
 As the music of the universe plays

Chorus

G **C**
 (singing) You are holy, great and mighty

Em **D**
 The moon and the stars declare who You are

G **C**
 I'm so unworthy, but still You love me

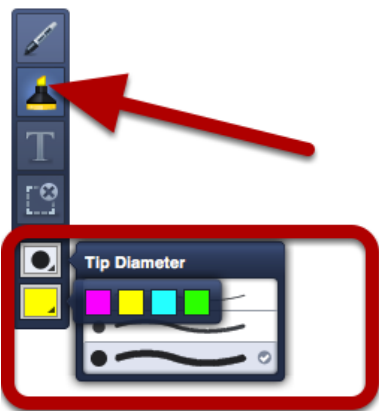
Em **D**
 Forever my heart will sing of You

Bridge

C **G** **D** **C** **G** **D**
 All glory, honor, power is Yours. (Amen) All glory, honor, power is Yours. (Amen)

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.



Verse 2

G **D** **Am** **Em7**
 Beautiful and free The song of galaxies

C **G** **D**
 It's reaching far beyond the Milky Way

G **D** **Am** **Em7**
 Lets join in with the sound C'mon let's sing it loud

C **G** **D**
 As the music of the universe plays

Chorus

G **C**
 (singing) You are holy, great and mighty

Em **D**
 The moon and the stars declare who You are

G **C**
 I'm so unworthy, but still You love me

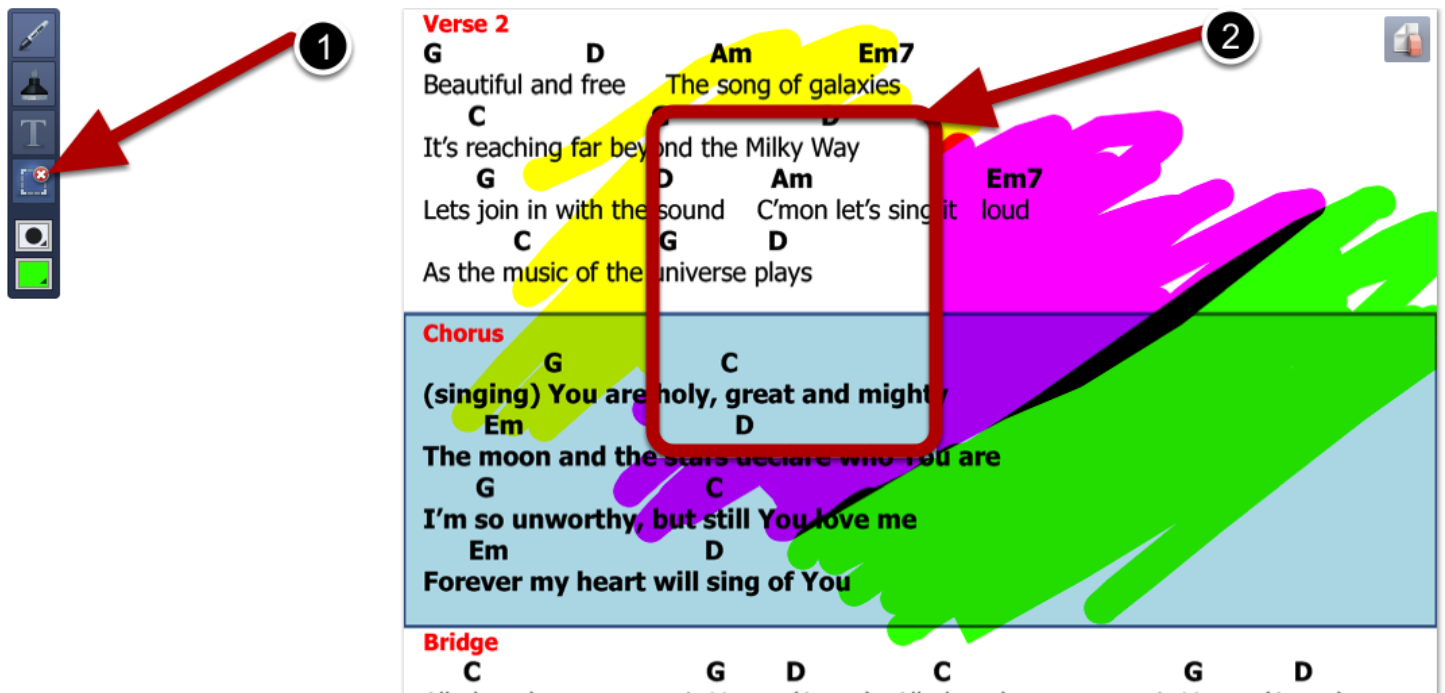
Once you've clicked on the highlighter, you can use the bottom 2 symbols to specify the diameter of the highlighter stroke, and the color (as seen above). Example of highlighter shown above.

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.

Verse 2

G **D** **Am** **Em7**
Beautiful and free The song of galaxies

C **G** **D**
It's reaching far beyond the Milky Way

G **D** **Am** **Em7**
Lets join in with the sound C'mon let's sing it loud

C **G** **D**
As the music of the universe plays

Test Annotations 1-2-3

Chorus

G **C** Repeat twice
(singing) You are holy, great and mighty

Em **D**
The moon and the stars declare who You are

G **C**
I'm so unworthy, but still You love me

Em **D**

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.

1

2

Verse 2

G **D** **Am** **Em7**
Beautiful and free The song of galaxies

C **G** **D**
It's reaching far beyond the Milky Way

G **D** **Am** **Em7**
Lets join in with the sound C'mon let's sing it loud

C **G** **D**
As the music of the universe plays

Test annotations 1-2-3

Chorus

G **C**
(singing) You are holy, great and mighty

Em **D**

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

Hardware for Music Stand

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.

Hands Free Page Turner for your Bluetooth-equipped Mac, PC, and iPad.



AirTurn BT-105
with 2 ATFS-1 Foot Switches

There are 2 bluetooth foot pedals that we recommend. The first is a transmitter that can be hooked up to any footswitch and can be purchased from [Airtun](#). 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 Airtun.

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 make this option even larger. This pedal is much smaller than it looks in the pictures, but it's 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.

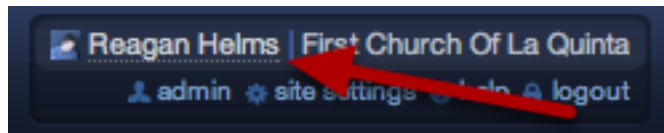
If your pedal is programmable, we recommend setting it to use the "f" and "b" keys for forward and back, respectively.

Personal Profiles

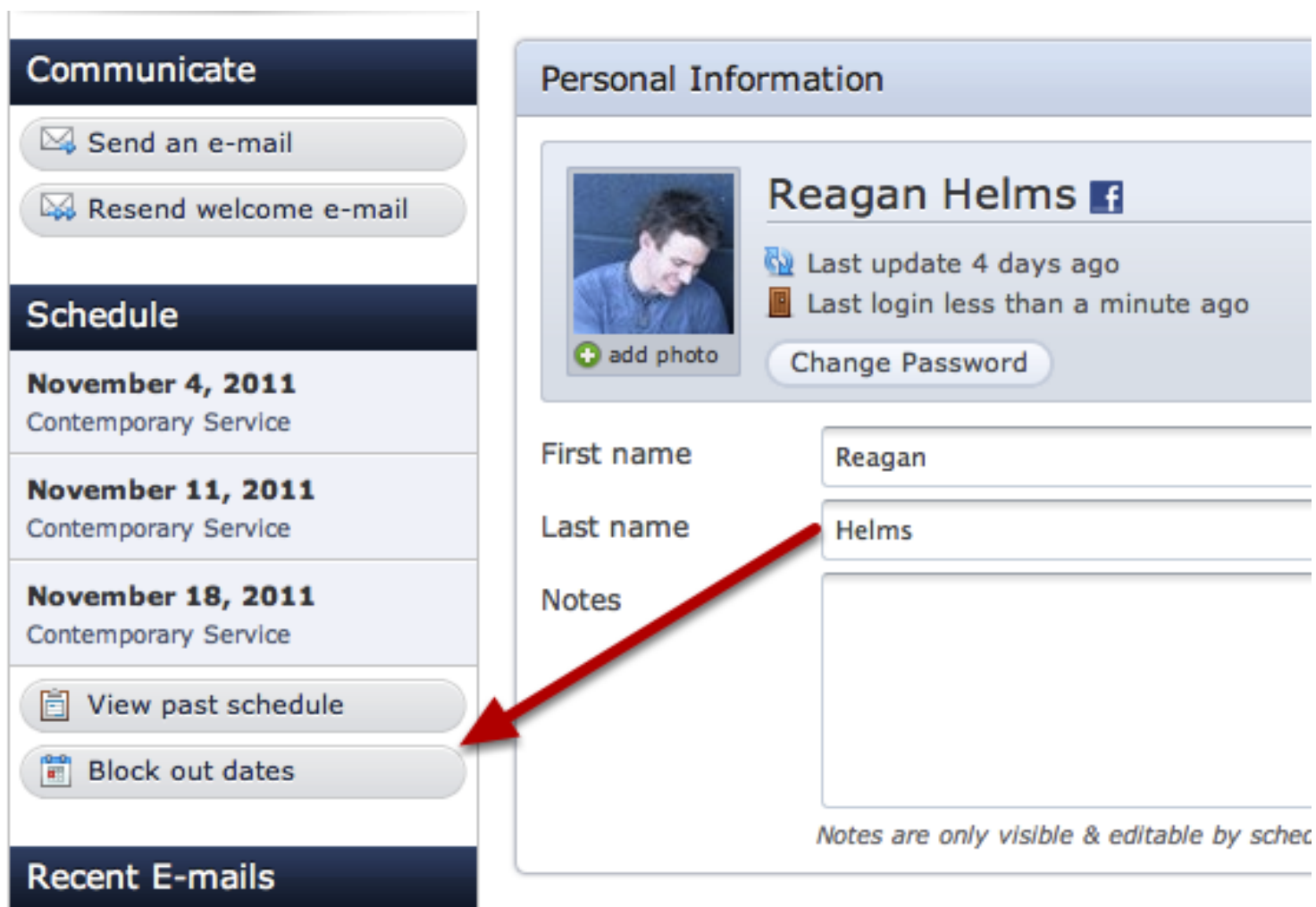
Block-Out Dates: Adding and Deleting

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'.



Communicate

- Send an e-mail
- Resend welcome e-mail

Schedule

November 4, 2011
Contemporary Service


November 11, 2011
Contemporary Service

November 18, 2011
Contemporary Service

- View past schedule
- Block out dates**

Recent E-mails

Personal Information

Reagan Helms 

Last update 4 days ago
Last login less than a minute ago

[Change Password](#)

First name: Reagan

Last name: Helms


Notes


Notes are only visible & editable by sched

Indicate dates to block out.

Block Out Dates


For: Reagan Helms
[pick a different person](#) [clear](#)

Starting On
6/15/2011  at the beginning of the day

Ending On
6/15/2011  at the end of the day

Reason

Repeat
None
None
Every Wednesday
Every Third Wednesday

 **Accept** [cancel](#)

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.

The screenshot shows a vertical schedule interface. At the top is a dark blue header with the word "Schedule" in white. Below the header is a light orange bar containing the text "3/21/2011 to 3/25/2011". Underneath are three rows, each with a date in bold and "Contemporary Service" below it: "November 4, 2011", "November 11, 2011", and "November 18, 2011". At the bottom are two rounded buttons: "View past schedule" with a calendar icon and "Block out dates" with a calendar icon. A red arrow points from the "Block out dates" button to the orange bar.


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

The screenshot shows a vertical schedule interface similar to the first one. It has a dark blue header with "Schedule" in white. Below the header is a light orange bar with "3/21/2011 to 3/25/2011". This is followed by three rows with dates and "Contemporary Service": "November 4, 2011", "November 11, 2011", and "November 18, 2011". At the bottom is another light orange bar with "12/20/2011 to 12/31/2011". Below these are two rounded buttons: "View past schedule" and "Block out dates". Two red arrows originate from the "Block out dates" button; one points to the top orange bar and the other points to the bottom orange bar.


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

Block Out Dates


Starting On

 at

Ending On

 at

Reason

[delete](#)  [cancel](#)

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

Block Out Dates

Starting On

10/4/2010



at

the beginning of the day



Ending On

10/25/2010



at

the end of the day



Reason



This is part of a recurring block out date for **every Monday from 10/04/2010 to 10/25/2010**. What do you want to change?

- THIS:** Edit this Block Out Date ONLY
- FUTURE:** Edit all FUTURE block out dates associated with this recurrence
- ALL:** Edit ALL block out dates associated with this recurrence

Or you can **DELETE** all block out dates associated with this recurrence.

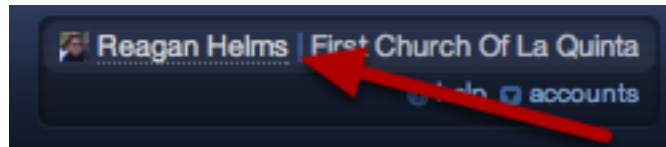
[delete](#)

Accept

[cancel](#)


Changing Your Password

Click on your name in the upper right corner.



Click 'Change Password'

Personal Information

 **Reagan Helms**
Last update 31 minutes ago
Last login less than a minute ago

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


First name

Last name

A screenshot of the "Personal Information" section of a user profile. The user's name is "Reagan Helms". There is a "Change Password" button with a red arrow pointing to it. Below the name, there are two text input fields: "First name" with the value "Reagan" and "Last name" with the value "Helms".

Type new password then confirm password

Personal Information

 **Reagan Helms**
Last update 31 minutes ago
Last login less than a minute ago

[+ add photo](#)

First name

Last name

A screenshot of the "Personal Information" section of a user profile, showing the password change process. The "New password" and "Confirm password" fields are visible, with a red arrow pointing to the "Confirm password" field. The "First name" and "Last name" fields are also visible, with values "Reagan" and "Helms" respectively.

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

Blank input fields

Assignment of the permissions

Viewer
Scheduled Viewer
Scheduled Viewer
Scheduled Viewer

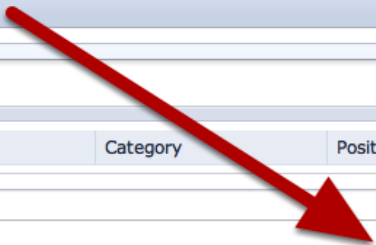
Scheduling emails General E-mails

Dates

Birth Date Anniversary

Custom Properties	
Search <input type="text"/>	
Custom Field	Property
Instruments Played	Bass Guitar
Instruments Played	Keys

Assigned Positions		
Search <input type="text"/>		
Service Type	Category	Position



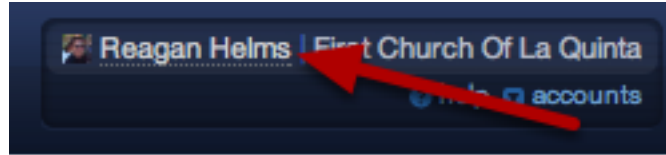
Save Person

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.

Contact Information

E-Mail Addresses Add email +

Home ▼ aaron@ministrycentered.com ⊖

Addresses Add address +

Phone Numbers Add phone +

Mobile ▼ (555) 123-4567 ⊖

Enable Text Messaging AT&T ▼

Scheduling Emails Scheduling Replies General E-Mails

Dates

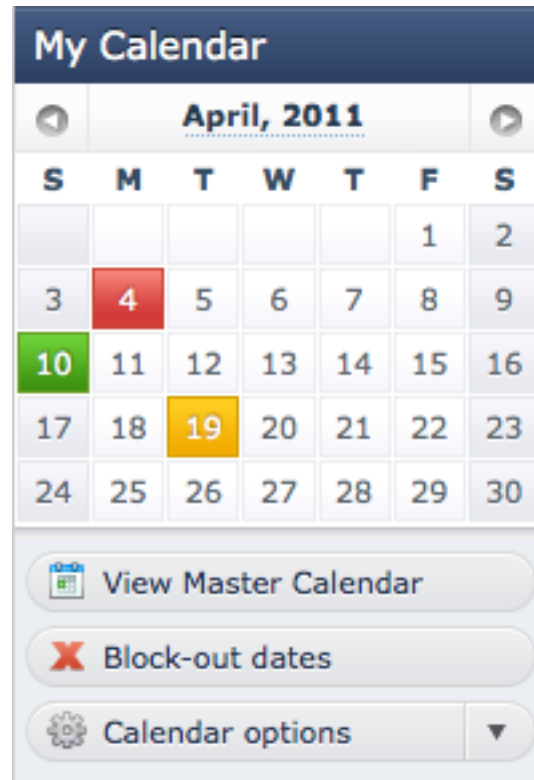
Birth Date 09/27/1978 📅 Anniversary 📅

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 your 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

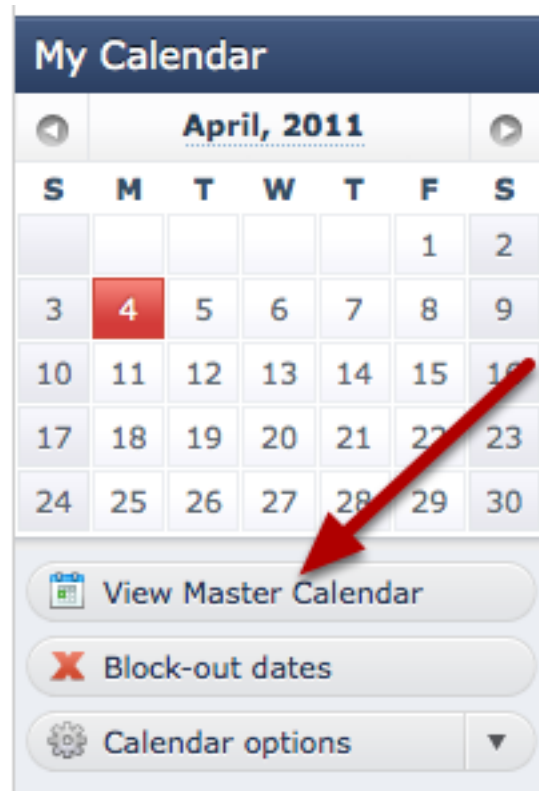
◀ November ▶ Service Type From All Se				
November				
Sunday	Monday	Tuesday	Wednesday	Thursday
	1 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● La Quinta/Main Worship Team Practice: 7:00pm </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● Blocked Out By Katharine Jones </div>	2	3 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● East Valley Campus Rehearsal Times: 7:00pm </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● La Quinta/Main Service Times: 9:00am and 11:00am Call Time: 8:00am </div>	4
7 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● Southwest Campus Service Times: 9:00am and 11:00am </div>	8 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● La Quinta/Main Worship Team Practice: 7:00pm </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● Blocked Out By Katharine Jones </div>	9	10 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● East Valley Campus Rehearsal Times: 7:00pm </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● La Quinta/Main Service Times: 9:00am and 11:00am Rehearsal: 11:00am Call Time: 8:00am </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● Blocked Out By Dave Petrie </div>	11 Today
14 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● Southwest Campus Service Times: 9:00am and 9:00am </div>	15 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● La Quinta/Main Worship Team Practice: 7:00pm </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● Blocked Out By Katharine Jones </div>	16	17 <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● East Valley Campus Rehearsal Times: 7:00pm </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ● La Quinta/Main Service Times: 9:00am and 11:00am Call Time: 8:00am </div>	18

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 anniversaries.

Larger Calendar View

November			
Sunday	Monday	Tuesday	Wednesday
	<p>La Quinta/Main Campus Worship Team Practice: 7:00pm</p> <p>Blocked Out By Katharine Jones</p>	<p>Today 2</p>	<p>East Valley Campus Rehearsal Times: 7:00pm</p> <p>La Quinta/Main Campus Service Times: 9:00am and 11:00am Call Time: 8:00am</p>
<p>Southwest Campus 1 Service Times: 9:00am and 11:00am</p>	<p>La Quinta/Main Campus 8 Worship Team Practice: 7:00pm</p> <p>Blocked Out By Katharine Jones</p>	<p>9</p>	<p>East Valley Campus 10 Rehearsal Times: 7:00pm</p> <p>La Quinta/Main Campus Service Times: 9:00am and 11:00am Rehearsal: 11:00am Call Time: 8:00am</p> <p>Blocked Out By Dave Petrie</p>
<p>14</p>	<p>La Quinta/Main Campus 15 Worship Team Practice: 7:00pm</p> <p>Blocked Out By 3 Katharine Jones</p>	<p>16</p>	<p>East Valley Campus 4 Rehearsal Times: 7:00pm</p> <p>La Quinta/Main Campus Service Times: 9:00am and 11:00am Call Time: 8:00am</p>
<p>21</p>	<p>La Quinta/Main Campus 22 Worship Team Practice: 7:00pm</p> <p>Blocked Out By Katharine Jones</p>	<p>23</p>	<p>East Valley Campus 24 Rehearsal Times: 7:00pm</p> <p>La Quinta/Main Campus Service Times: 9:00am and 11:00am Call Time: 8:00am</p>

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.

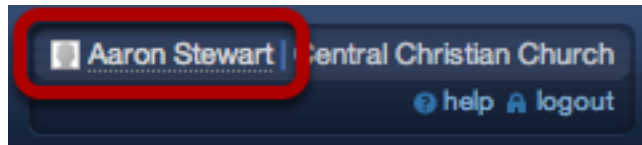
Filtering the Master Calendar

The screenshot displays a software interface for a Master Calendar. At the top, there is a 'Service Type' dropdown menu set to 'From All Service Types...'. To the right is a 'Show Items' menu with four checked options: 'Show Plans' (blue dot), 'Show Blockout Dates' (red dot), 'Show Birthdates' (green dot), and 'Show Anniversaries' (yellow dot). Below this is a calendar grid with two columns: 'Thursday' (labeled with a '4') and 'Friday' (labeled with a '5'). Under the Friday column, three items are listed: 'East Valley Campus' with 'Service Times: 11:00am', 'Southwest Campus' with 'Service Times: 9:00am and 11:00am', and 'Blocked Out By' (highlighted in red) with 'Katharine Jones'.

You can also filter which items are visible by clicking the items filter 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

Personal Information



Aaron Stewart

Last update less than a minute ago
Last login 2 minutes ago

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

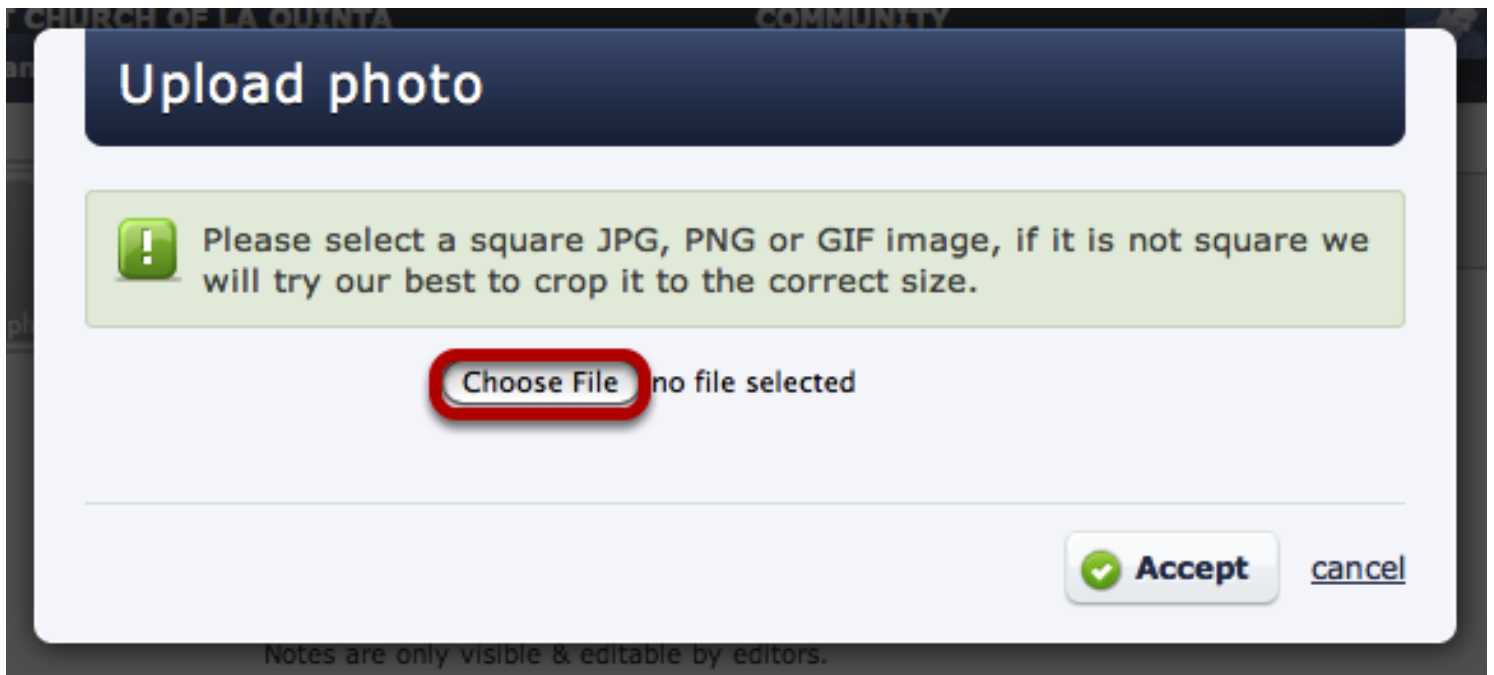
First name

Last name

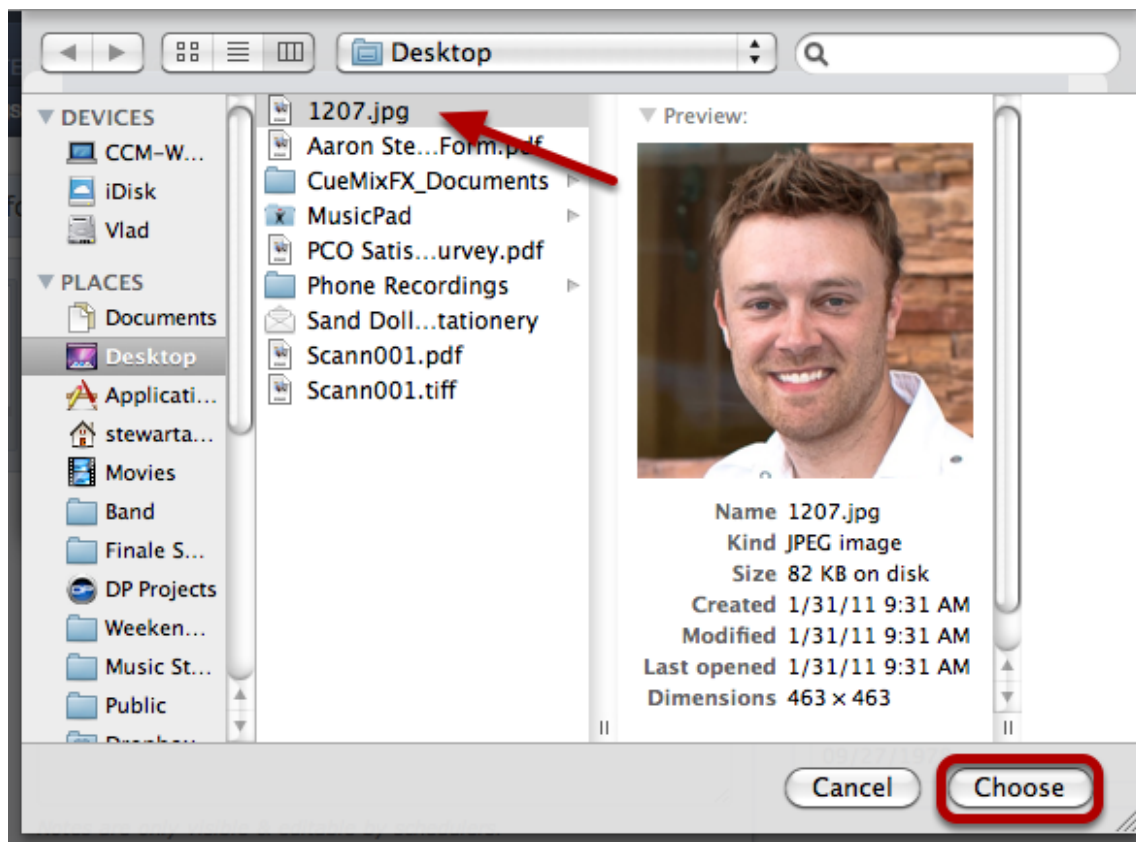
Notes

Notes are only visible & editable by schedulers.

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.

Upload photo

 Please select a square JPG, PNG or GIF image, if it is not square we will try our best to crop it to the correct size.

 28450_1522...797_n.jpg


[cancel](#)

Notes are only visible & editable by editors.



Photo is Uploaded.


Successfully uploaded photo.

Personal Information



Aaron Stewart

 Last update less than a minute ago
 Last login 5 minutes ago

 add photo

First name

Last name

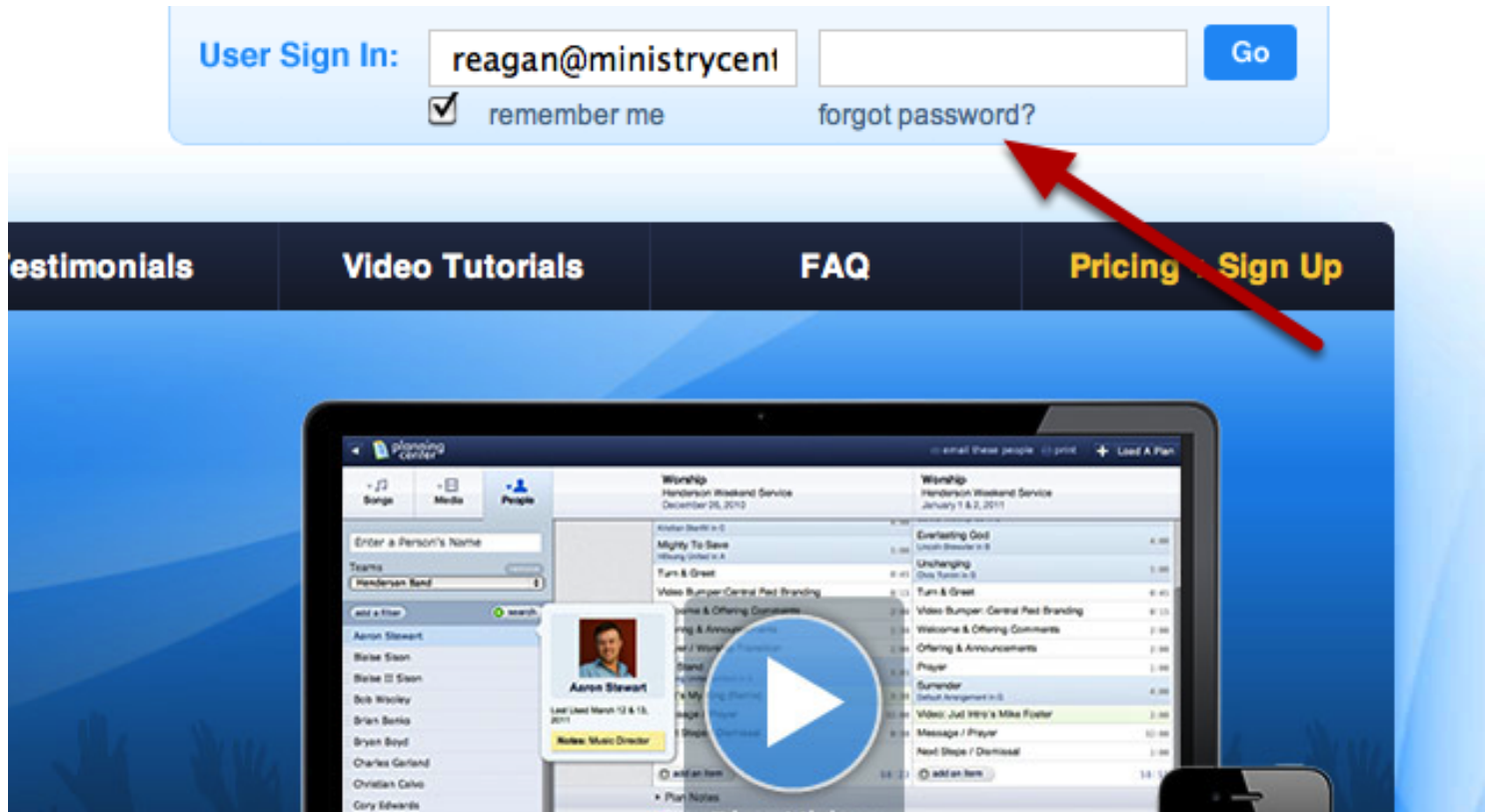
Notes

Notes are only visible & editable by schedulers.

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...



planning center

Forgot Your Password?

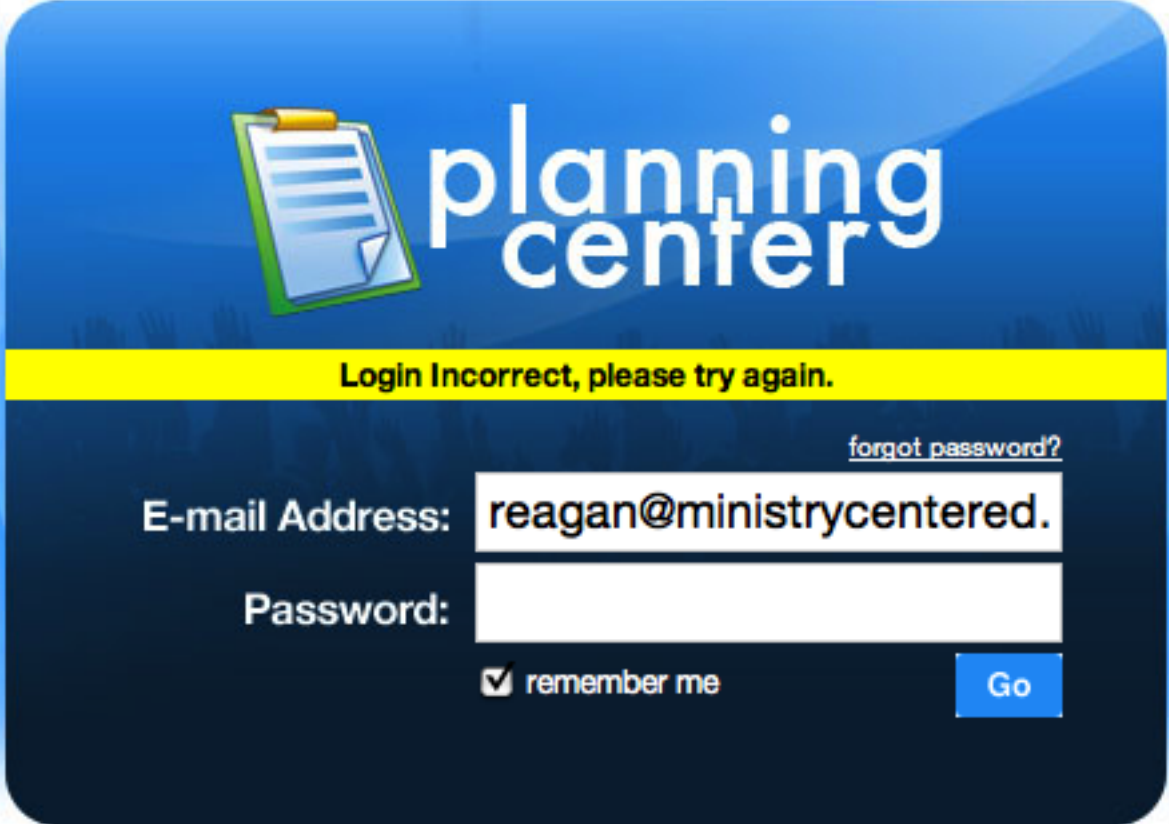
Did you forget your password? Or might you not even have one yet? If so fill out the form below and we will send you instructions to reset your password.

E-Mail Address:

REQUEST PASSWORD 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:



The image shows a login interface for 'planning center'. At the top left is a clipboard icon. The text 'planning center' is displayed in a large, white, sans-serif font. Below this, a yellow banner contains the error message 'Login Incorrect, please try again.' in black text. Underneath the banner, there is a 'forgot password?' link. The 'E-mail Address:' label is followed by a text input field containing 'reagan@ministrycentered.'. Below that is the 'Password:' label followed by a password input field. At the bottom left, there is a checked checkbox labeled 'remember me'. At the bottom right, there is a blue button labeled 'Go'.

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 email 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:



 **planning
center**

[forgot password?](#)

E-mail Address: reagan@ministrycentered.

Password:

remember me

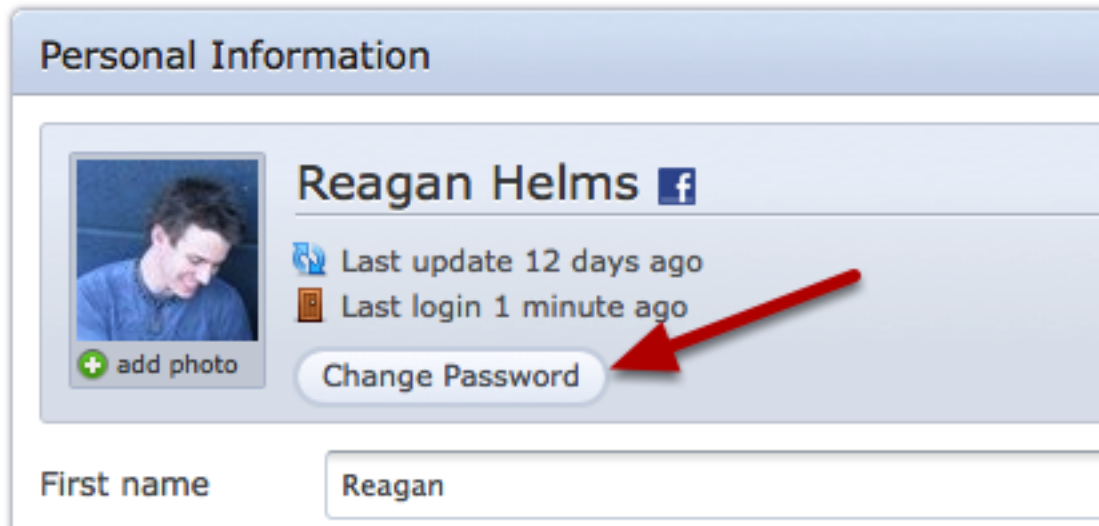
If you enter your password, and the screen resets without an error message, here are a few things that you can try.

- 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.



Multiple Accounts Found

We have found multiple accounts with the e-mail address and password you provided

Reagan Helms  [link these accounts](#) 

[LOGIN](#) To First Church Of La Quinta

[LOGIN](#) To MCT Church of Christ

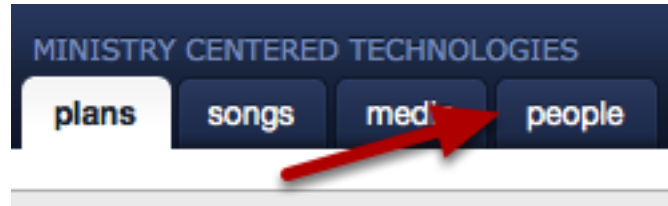
Just click on "link these accounts" if you would like to link them, or click login if you would prefer to keep them unlinked but still have one username or password for both.

People

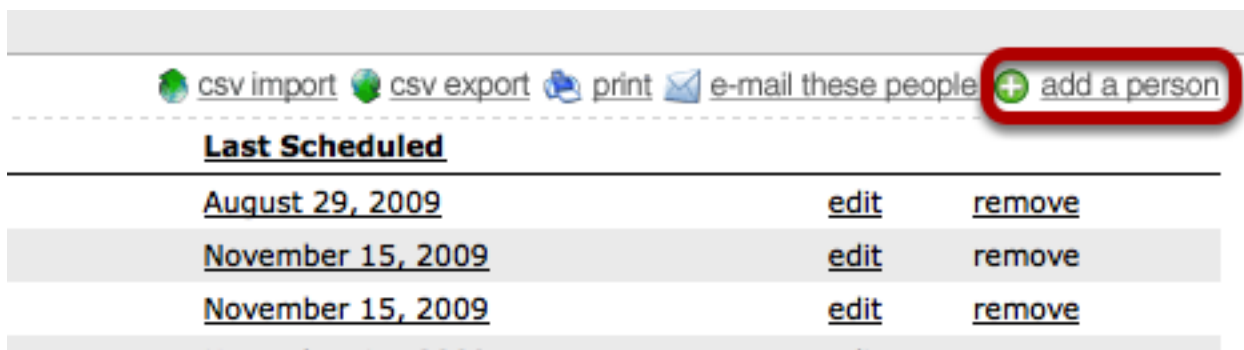
Adding a new person

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

Create A New Person

Personal Information



First name

Last name

Notes

Notes are only visible & editable by schedulers.

Send a welcome email

Contact Information

E-Mail Addresses Add email +

Home -

Addresses Add address +

Home -

Phone Numbers Add phone +

Home -

Dates

Birth Date Anniversary

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

Permissions

[Click here for an explanation of the permissions](#)

Site Permissions	Viewer
Children's	Same As Parent
Other Productions	Same As Parent
Student Ministries	Same As Parent
Weekend Worship Services	Same As Parent
La Quinta/Main Campus	Same As Parent

Access Plan Files Access Song Streams & Files
 Access Media Streams & Files

Custom Properties

Custom Field	Property
<input type="text" value="Search"/>	

Assigned Positions

Service Type	Category	Position
<input type="text" value="Search"/>		

Save Person

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



Ministry Centered Technologies People

Permissions	First Name	Last Name	E-Mail Address
VIEWER	A	Viewer	MD4@test.cc
ADMINISTRATOR	Aaron	Stewart	apstew@ma
SCHEDULED VIEWER	Amy	Sampson	
SCHEDULED VIEWER	AOL	IP Confirm	ipconfirm@p
SCHEDULED VIEWER	AOL	Test	PlanningCen
SCHEDULED VIEWER	Bad	E-Mail	NotAGoodEM
SCHEDULED VIEWER	Brandon	Sampson	
SCHEDULED VIEWER	Check	Spoof	check-auth@
ADMINISTRATOR	Danna	Sampson	danna@mini
SCHEDULED VIEWER	Earthlink	Block	blockedbyea
SCHEDULED VIEWER	Eli	Sampson	

Scroll to the bottom, to change their permissions

A screenshot of a "Permissions" dialog box. At the top, it says "Permissions" and has a link "Click here for an explanation of the permissions". Below that, there are several rows of settings. The first row is "Site Permissions" with a circled "1" and a dropdown menu set to "Administrator". The second row is "Children's Ministry" with a circled "2" and a dropdown menu set to "Same As Parent". The third row is "Contemporary Service" with a dropdown menu set to "Same As Parent". The fourth row is "Traditional Service" with a dropdown menu set to "Same As Parent". At the bottom, there are two checked checkboxes: "Access Plan Files" and "Access Song Streams & Files".

1. This is the Site 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

Instruments Played
Acoustic Guitar
Bass Guitar
Drums
Electric Guitar
Keys
Organ
Percussion
Piano
Vocal Part
Alto
Bass
Soprano
Tenor


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.

The screenshot displays the 'Person Custom Properties' interface. It is divided into three main sections:

- 1st/3rd Week Band:** This section has an 'edit' and 'remove' button. Below the header are four property boxes: 'Bass', 'Drums', 'Guitar', and 'Keys'. Each box contains a pencil icon and an 'x' icon. Below these boxes is an 'Add' button.
- 2nd/4th Week Band:** This section also has an 'edit' and 'remove' button. It contains four property boxes: 'Bass', 'Drums', 'Guitar', and 'Keys', each with a pencil and 'x' icon, and an 'Add' button below.
- Teams:** This section has an 'edit' and 'remove' button. It contains three property boxes: 'East Valley Campus', 'Main Campus', and 'Southwest Campus', each with a pencil and 'x' icon. Below these boxes is an 'Add' button.

Red arrows and numbered circles indicate the flow of information:

- A red arrow points from the 'edit' button of the '1st/3rd Week Band' section to a circle containing the number '1'.
- Another red arrow points from the circle '1' to the 'edit' button of the '2nd/4th Week Band' section.
- A third red arrow points from the 'edit' button of the 'Teams' section to a circle containing the number '2'.

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.

Edit Option

Name:

Assigned People:

-
-

Jeff Berg

Scott Motte

Aaron Stewart

[cancel](#)

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

Custom Properties

gui|

- 1st/3rd Week Band: Guitar
- 2nd/4th Week Band: Guitar

Teams	East Valley Campus
Teams	Main Campus
Teams	Southwest Campus
Vocals	Choir
Children's > Children's Volunteers	1st graders
Children's > Children's Volunteers	2nd Graders
Children's > Children's Volunteers	3's and 4's

...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

MCT Church of Christ

[matrix](#) [create a service](#)

Sunday Evening Worship

UPCOMING PLANS

SERIES TITLE

PLAN TITLE

Katie Willard
7 days ago

[No dates](#)

ATTACHMENTS

[create a new plan](#) [matrix](#) [archives](#) [reports](#) [properties](#)
[link to an attachment](#) [upload an attachment](#)

Sunday Morning Worship

UPCOMING PLANS

SERIES TITLE

PLAN TITLE

Katie Willard
7 days ago

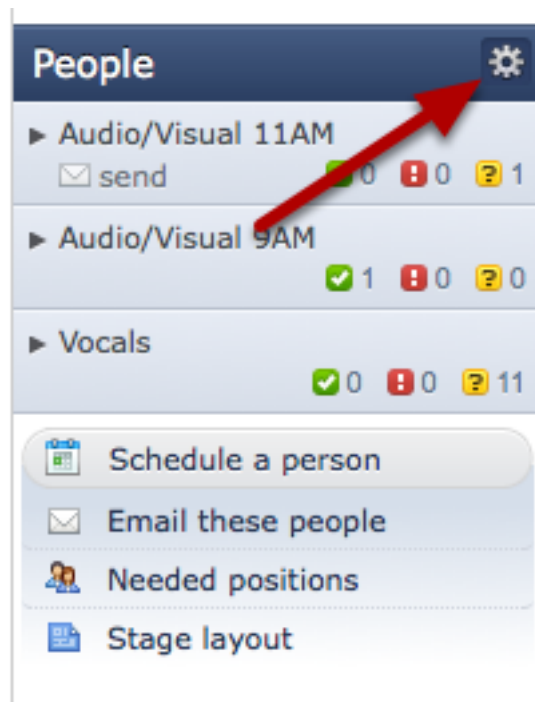
[No dates](#)

ATTACHMENTS

[create a new plan](#) [matrix](#) [archives](#) [reports](#) [properties](#)
[link to an attachment](#) [upload an attachment](#)

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.

Edit Category

Name

Default Scheduling Options

Status:

Send Replies For: Accept Decline

Send Replies To:
LastName, FirstName

Update future schedules

Scheduled Viewers See:

Prepare Notification

Stage Layout Options

Stage Icon:

[cancel](#)

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!

The screenshot shows a web interface titled "Manage People Categories & Positions". It features a list of categories on the left, including "Audio/Visual 11AM", "Audio/Visual 9AM", "Band 11AM", "Choir", "Hospitality", "Instruments Played", "TEAMS", "Tech 9AM", "Tech 11AM", and "Vocals". The "TEAMS" category is highlighted with a red border and contains four sub-items: "Serving Team A", "Serving Team B", "Special Events Choir", and "Weekend Choir". A blue "add position" button is located below the "Weekend Choir" item. At the bottom of the interface, there are buttons for "add new category", "copy a category", and "close".

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:

Create A New Person

1 error prohibited this person from being saved

There were problems with the following fields:

- This person has the same first name, last name and e-mail address as another person and is considered a duplicate record. If of these fields. If you need help please e-mail technical support at support@

First name:
Last name:

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

The image shows a 'Filter' panel with the following elements:

- Service:** A drop-down menu with a red arrow pointing to the drop-down arrow (labeled 1).
- Name:** A text input field with a red arrow pointing to the input field (labeled 2).
- Positions & Categories:** A text input field with a red arrow pointing to the input field (labeled 3).
- Permission:** A drop-down menu showing 'Scheduled Viewer' with a red arrow pointing to the drop-down arrow (labeled 4).
- Show Disabled Accounts:** A checked checkbox with a red arrow pointing to the checkbox (labeled 4).
- Apply Filter:** A blue button with a red arrow pointing to the button (labeled 5).

To the right of the filter panel is a vertical column of 'Min' and 'S' labels.

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

Custom Properties	
Audio/Visual	SI
Audio	SI
Camera	SI
Lights	SI
Producer	
Video Switcher	SI
Band	
Acoustic Guitar	
Drums	SI
Electric Guitar	SI
Keys	SI
Hospitality	SI
Greeters	
Ushers	
Instruments Played	
Acoustic Guitar	
Bass Guitar	
Drums	
Electric Guitar	

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:

First Church Of La Quinta People

[csv import](#) [csv export](#) [print](#) [e-mail these people](#) [add a person](#)

You are filtering your people to the people that have **Instruments Played** property of **Acoustic Guitar**. [To clear this filter click here](#)

Permissions	First Name	Last Name	E-Mail Address	Last Scheduled		
SCHEDULER	Jason	Berg	jason@ministrycentered.com	November 22, 2009	edit	remove
SCHEDULED VIEWER	Jeff	Berg	jeff@ministrycentered.com	November 22, 2009	edit	remove
SCHEDULED VIEWER	Jeff	Spill	spillman@ministrycentered.com	November 22, 2009	edit	remove
ADMINISTRATOR	Katie	Willard	katie@ministrycentered.com	November 29, 2009	edit	remove
SCHEDULED VIEWER	Shannon	Berg	shannon@ministrycentered.com	November 15, 2009	edit	remove

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.

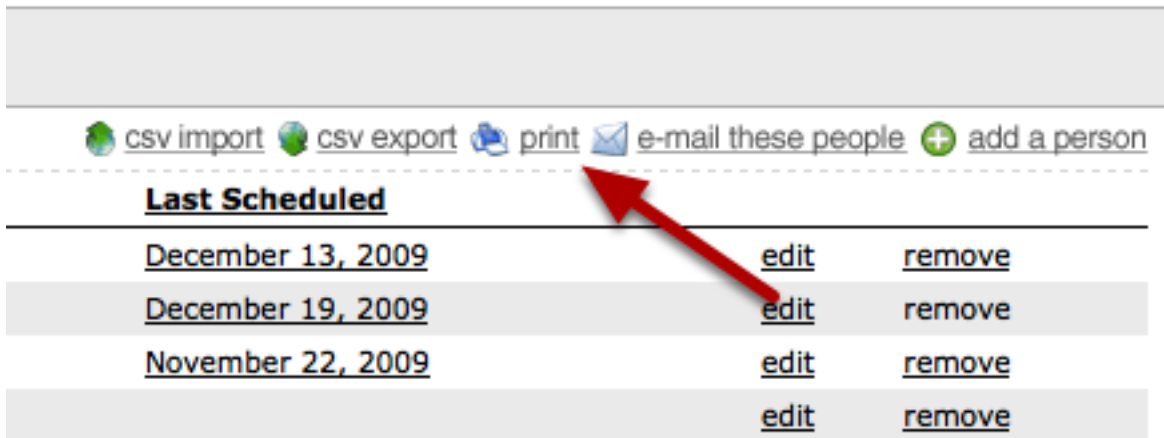
Scheduled Viewers:

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.

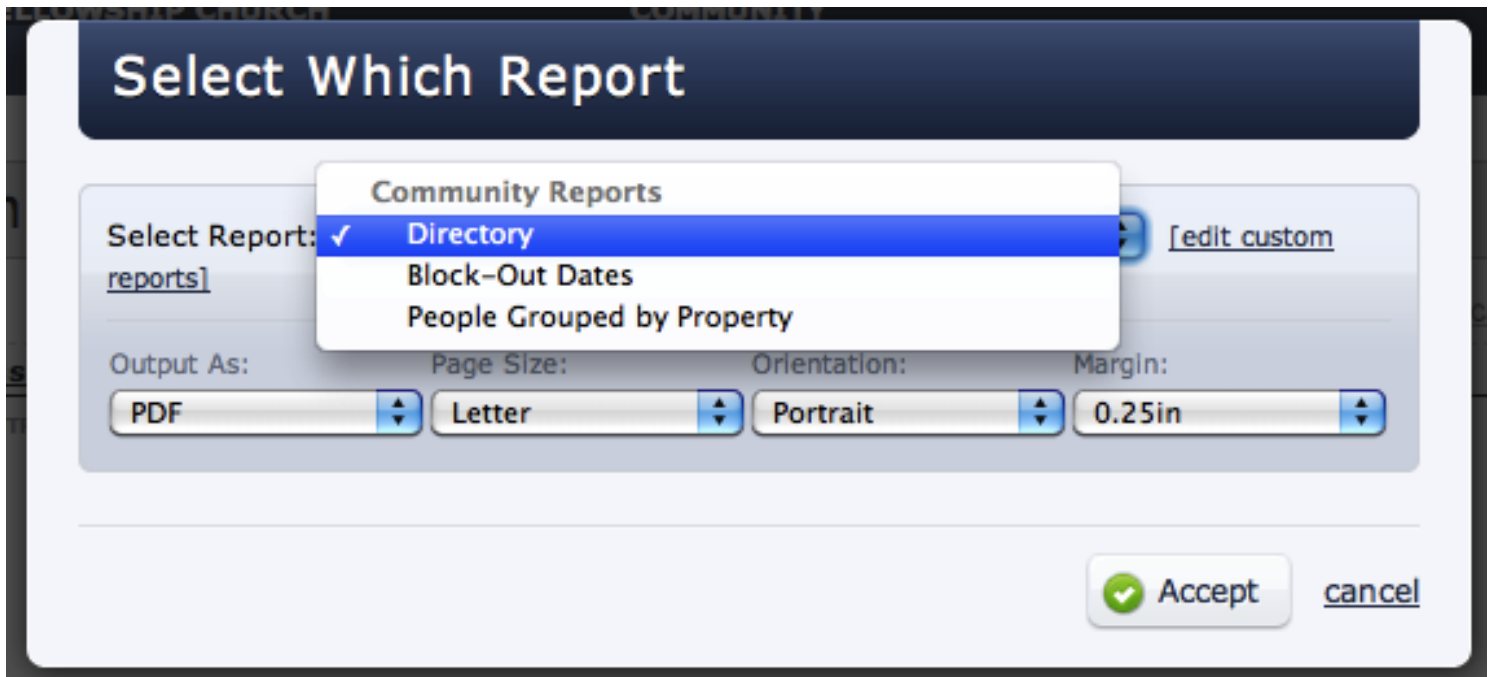
On the People page, click Print.



The screenshot shows a toolbar with the following options: [csv import](#), [csv export](#), [print](#), [e-mail these people](#), and [+ add a person](#). Below the toolbar is a section titled **Last Scheduled** with a table of dates and actions.

Last Scheduled	edit	remove
December 13, 2009	edit	remove
December 19, 2009	edit	remove
November 22, 2009	edit	remove
	edit	remove

Choose the report you want.







The dialog box is titled "Select Which Report". It features a "Select Report:" dropdown menu with a list of options: **Directory** (selected), Block-Out Dates, and People Grouped by Property. To the right of the dropdown is an "[edit custom]" link. Below the dropdown are four settings: "Output As:" (PDF), "Page Size:" (Letter), "Orientation:" (Portrait), and "Margin:" (0.25in). At the bottom right, there are "Accept" and "cancel" buttons.

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



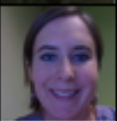
	Name	Email	Phone
	Aaron Stewart	aaron@ministrycentered.com	
	Demo Account	jeff@ministrycentered.com	
	Dennis Berg	dennis@ministrycentered.com	Home: dude
	Editor Adams	johnadams@example.com yo@email.com	

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'.

2's rm. 141
3's and 4's rm 122
3's and 4's rm 132
Check-In
Clean Up
Vocal Part
Alto
Bass
Choir
Soprano
Tenor


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

Name your property

Add A Property

Name:

Ministry Folder:

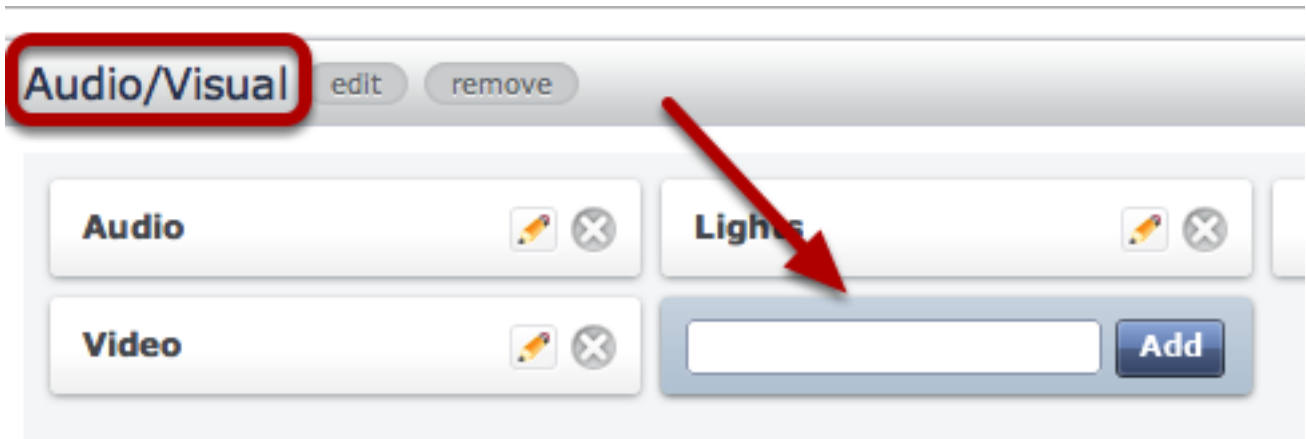
Multiple Selections

Person C

Audio/Visual

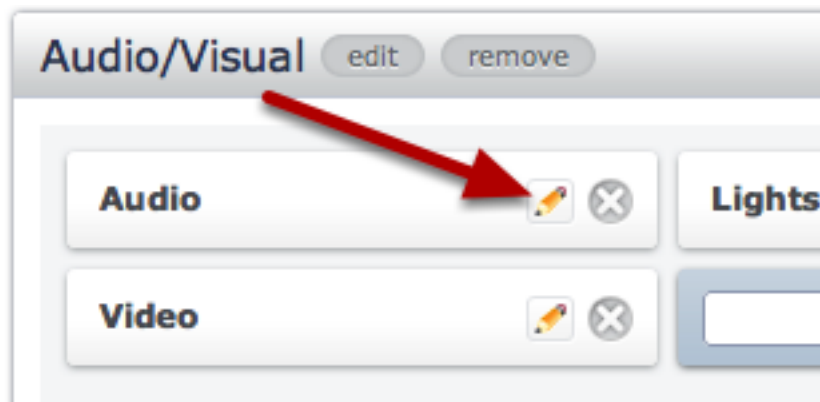
Enter the name of the property and select if you'd like it to be attached specifically to a folder (this is not necessary, just an option).

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.

Edit Option

Name:

Associated People:

Aubrey Wentz

Cuddles Berg

Dennis Berg

Hannah Berg

Jason Beddall

Jason Berg

Jeff Berg

Jeff Berg

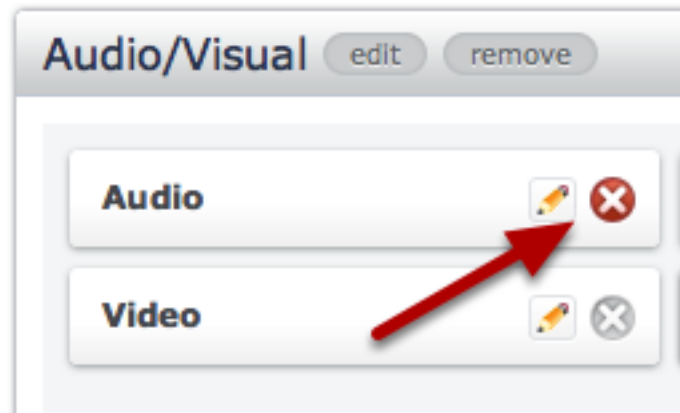
Shannon Berg

Thomas Berg

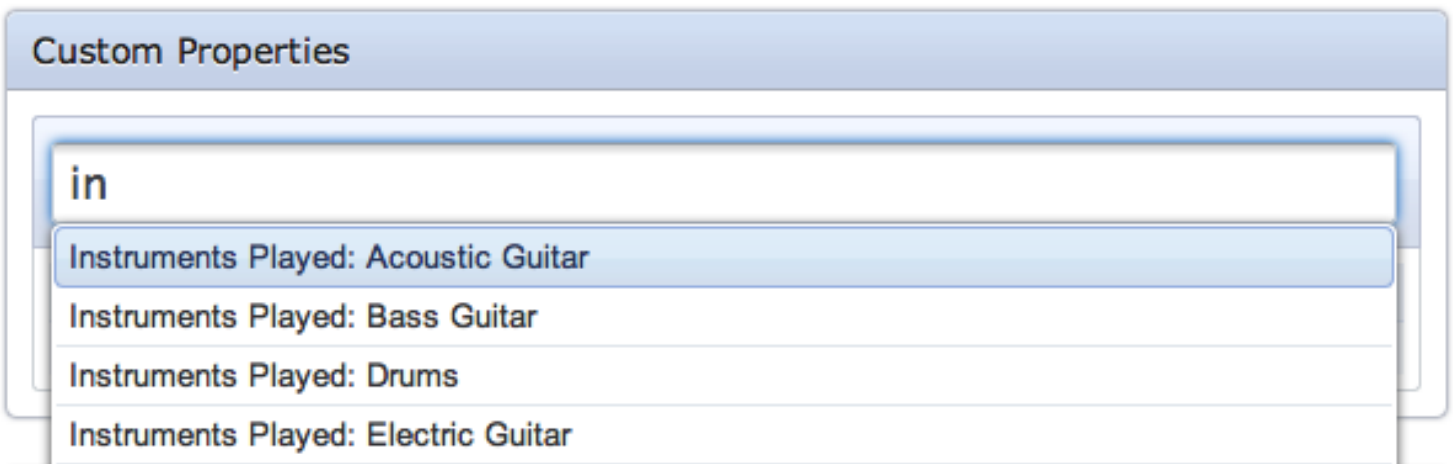
 **Accept**

[cancel](#)

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.

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

[March 31, 2011](#)

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)

[April 28, 2011](#)

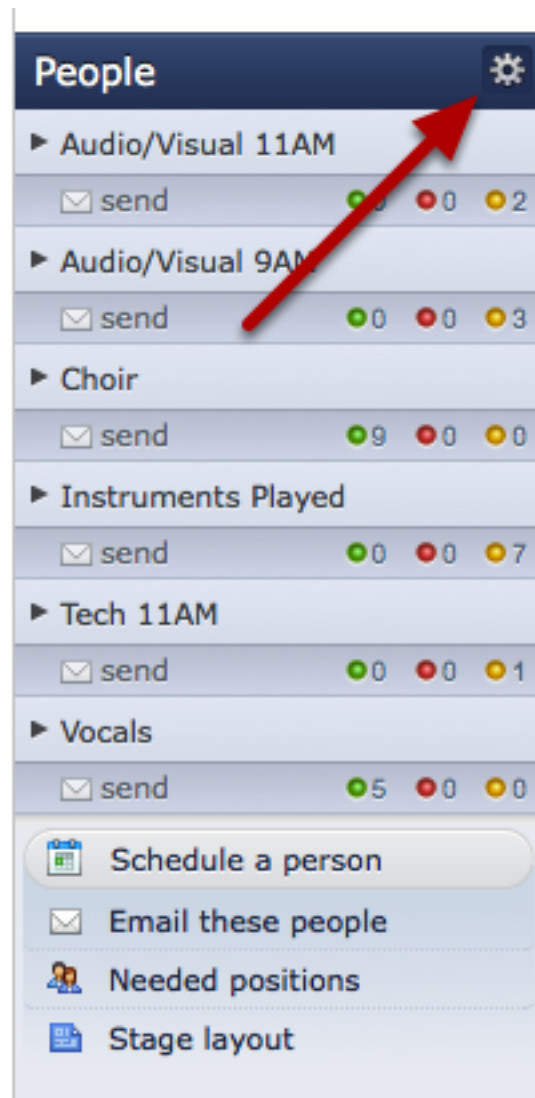
[May 5, 2011](#)

[May 12, 2011](#)



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.

The screenshot displays the 'Manage People Categories & Positions' interface. On the left, there is a list of categories: Audio/Visual 11AM, Audio/Visual 9AM, Band 11AM, Choir, Instruments Played, Tech 9AM, Tech 11AM, and Vocals. On the right, there is a grid of positions: Alto, Tenor, Choir, and Worship Leader. A blue 'add position' button is located at the bottom right of the grid. At the bottom left, there are two buttons: 'add new category' and 'copy a category'. At the bottom right, there is a 'close' button. Red arrows point to the 'add new category' button, the 'Choir' position, and the 'add position' button.

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

Enter the Property name

Add New Category

Name

Default Scheduling Options

Status: Send Replies For: Accept Decline Send Replies To:
LastName, FirstName

Scheduled Viewers See:

Prepare Notification

Stage Layout Options

Stage Icon:

[cancel](#)

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

Manage People Categories & Positions

- Audio/Visual 11AM
- Audio/Visual 9AM
- Band 11AM
- Choir
- Hospitality**
 - Coffee Set-Up
 - Food Set-Up
 - Greeter
 - Parking Lot
 - Usher
 - add position
- Instruments Played
- Tech 9AM
- Tech 11AM
- Vocals

+ add new category 📄 copy a category ✕ close


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.

Personal Information



Set Password

First

Last

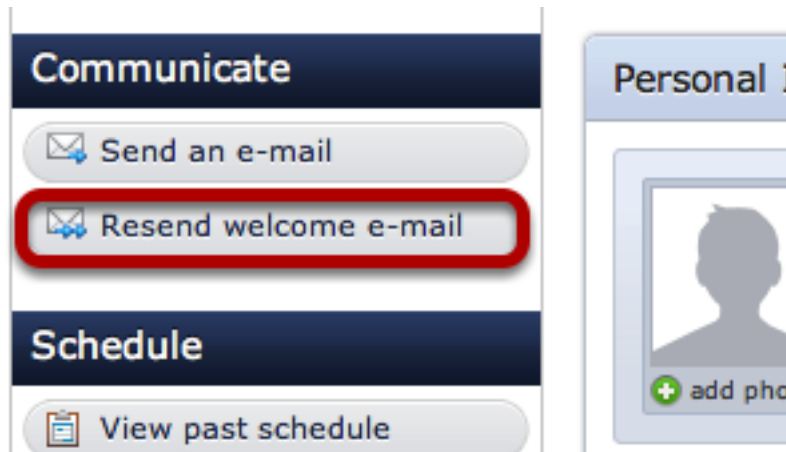
Notes

Notes are only visible & editable by schedulers.

Send a welcome email

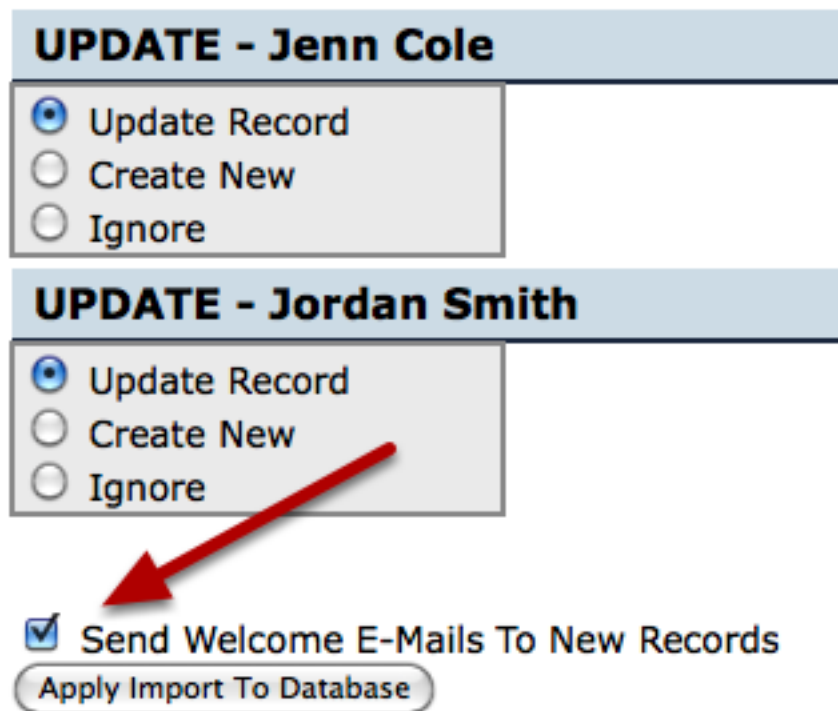
Make sure that you keep the box checked to send a welcome email. This person will need to receive one in order to have their user name and password that the system automatically generates for them. It also has a link in the email to watch a volunteer tutorial which will lay out the basic features of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



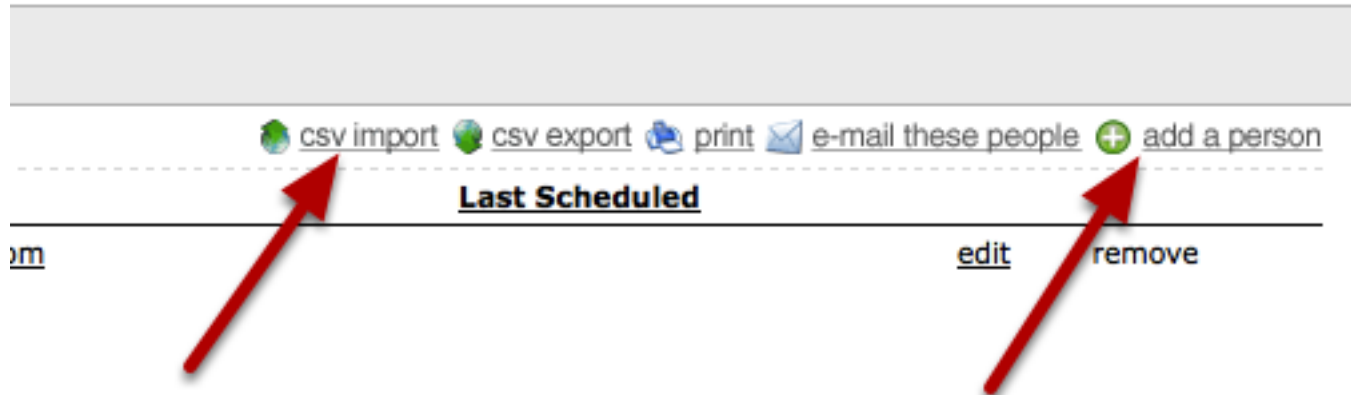
When you import a CSV file, it will by default have the box checked to send welcome emails to the new records. If you choose to uncheck the box and then continue on to import the list, you will not be able to go back and send a mass amount of welcome emails at one time. You will then have to

go through each individual account 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

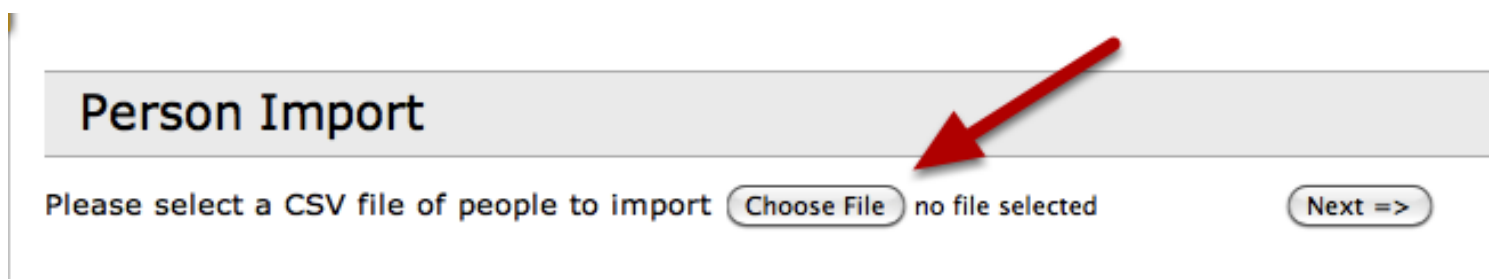
If you have a CSV file with people you'd like to import, the Site Owner can import all the people at once instead of adding each person individually.

Add People or Import Contacts



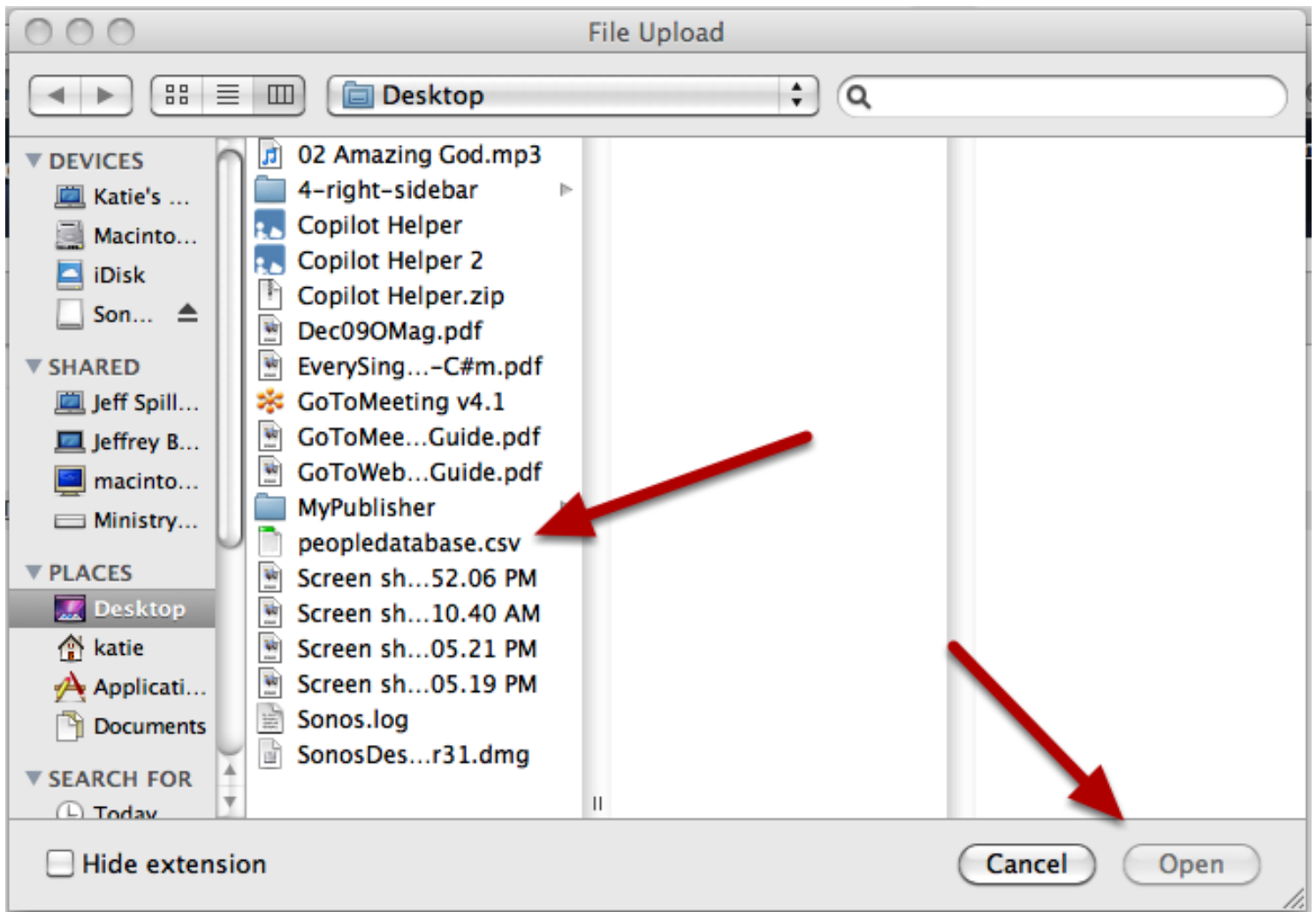
You have two options as far as adding people to your database: [Add A Person](#) (which adds one individual person at a time) or, csv import (which can import a whole list of people with their information all at once). If you choose to import your information, it MUST be in a CSV format. NOTE: ONLY OWNERS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

First Name:	First Name
Last Name:	Last Name
Screen Name:	Not Used
Email:	Home E-Mail
Title:	Not Used
Address:	Home Address Street
City:	Home Address City
State/Province:	Home Address State
Zip/Postal Code:	Home Address Zip Code
Country:	Not Used
Home Phone:	Home Phone Number
Mobile Phone:	Mobile Phone Number
Work Phone:	Not Used
Pager:	Not Used
Fax:	Not Used
WebPage:	Not Used
Timezone:	Not Used
Last Updated:	Not Used
Notes:	Not Used

Confirm & view potential changes

Create New records

NEW - Stephanie Williams

- Create New
 Ignore

NEW - Jen Wingate

- Create New
 Ignore

NEW - Justin Wingate

- Create New
 Ignore

NEW - Brad Witty

- Create New
 Ignore

NEW - Jerren Wright

- Create New
 Ignore

NEW - Greg Yoon

- Create New
 Ignore

Send Welcome E-Mails To 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 in order to have access to the CSV export link.

On the People tab

First Church Of La Quinta People

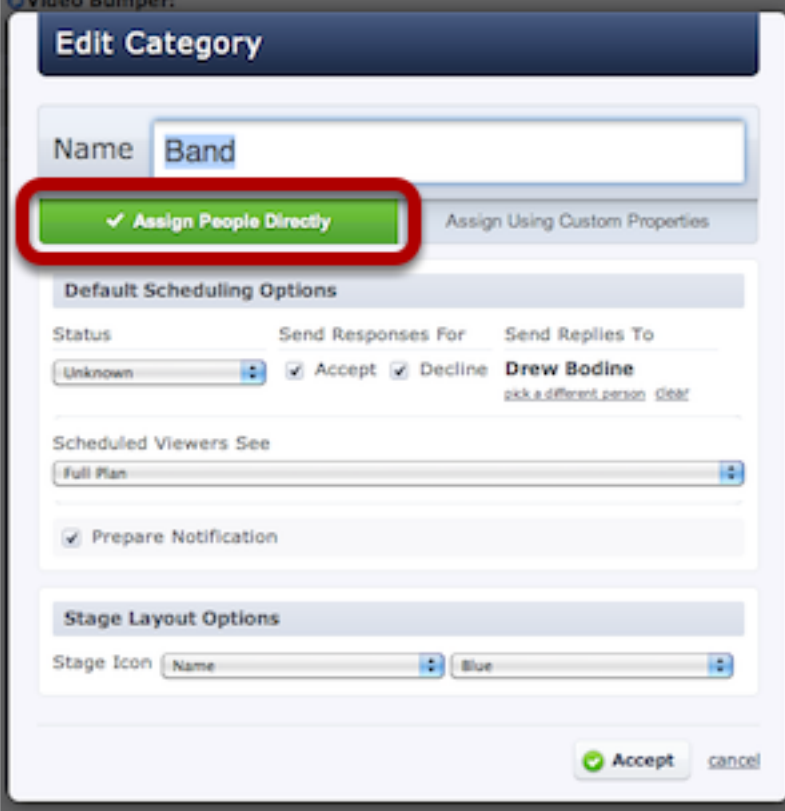
Permissions	First Name	Last Name	E-Mail Address	Last Sc
ADMINISTRATOR	Aaron	Stewart	aaron@gmail.com	March 3
SCHEDULED VIEWER	Anthony	Prochaska		March 1
VIEWER	Ashley	Tallungan		March 1
VIEWER	Aubrey	Wentz		March 3
SCHEDULED VIEWER	Cuddles	Berg	katie@ministrycentered.com	March 3
ADMINISTRATOR	Dave	Petrie	danna@ministrycentered.com	March 3
ADMINISTRATOR	Demo	Account	jeff@ministrycentered.com	March 1
ADMINISTRATOR	Dennis	Berg	dennis@ministrycentered.com	March 1
SCHEDULED VIEWER	Greg	Davis		March 3
SCHEDULED VIEWER	Hannah	ig	hannah@ministrycentered.com	March 3
ADMINISTRATOR	iPhone	ester	test@ministrycentered.com	March 1
ADMINISTRATOR	iPhone	Tester 2	test2@ministrycentered.com	March 1
VIEWER	Jason	Beddall	jason@madisonparkchurch.com	March 3
SCHEDULER	Jason	Berg	jason@ministrycentered.com	March 3
VIEWER	Jeff	Berg		March 1
VIEWER	Jeff	Spill	spill@gmail.com	March 3
VIEWER	Jenn	Cole		March 3
SCHEDULED VIEWER	Jordan	Smith	Reagan@ministrycentered.com	March 3
VIEWER	Karen	Willard		March 3
SCHEDULED VIEWER	Katharine	Jones	katie@ministrycentered.com	March 1
ADMINISTRATOR	Katie	Willard	katie@ministrycentered.com	March 3
ADMINISTRATOR	Preston	Helms	bubb1290@aol.com	
SCHEDULED VIEWER	Reagan	Helms	reagan@ministrycentered.com	March 3
VIEWER	Sarah	Willard	sarah.willard@gmail.com	March 1
SCHEDULED VIEWER	Scott	Motte	scott@scottmotte.com	March 1
ADMINISTRATOR	Shane	Armitage	Shane@ministrycentered.com	March 1
SCHEDULED VIEWER	Shannon	Berg	shannon@gmail.com	March 3

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

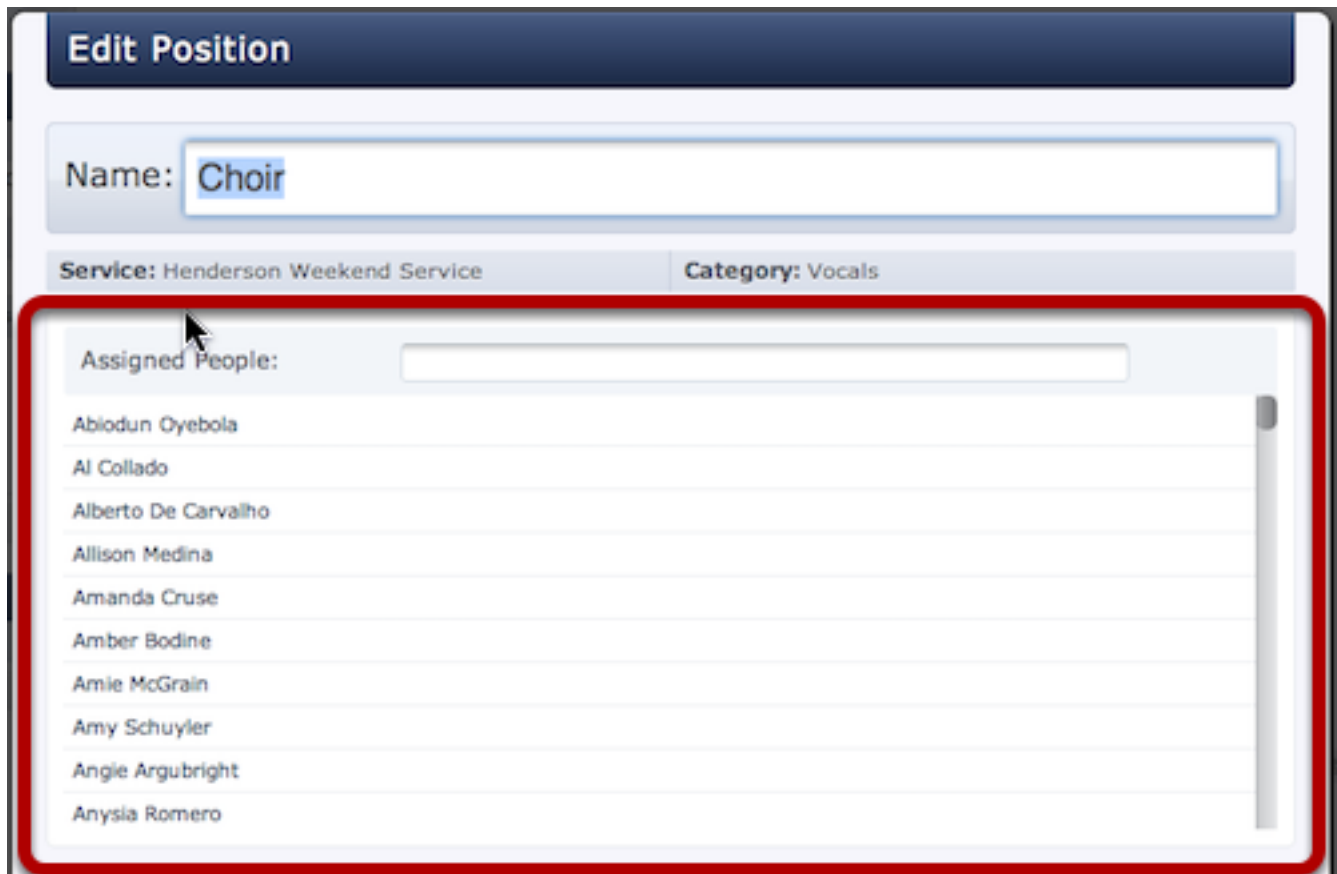
In most cases, Assigning People Directly to Positions is the easiest and most flexible way, but if you share positions across multiple services, Assigning Using Custom Properties can help you link them together.



The screenshot shows the 'Edit Category' form for a category named 'Band'. The form has two main assignment options: 'Assign People Directly' (highlighted with a red circle) and 'Assign Using Custom Properties'. Below these options are sections for 'Default Scheduling Options' and 'Stage Layout Options'. The 'Default Scheduling Options' section includes a 'Status' dropdown set to 'Unknown', 'Send Responses For' checkboxes for 'Accept' and 'Decline', and 'Send Replies To' set to 'Drew Bodine'. The 'Stage Layout Options' section includes a 'Stage Icon' dropdown set to 'Name' and a color dropdown set to 'Blue'. At the bottom right, there are 'Accept' and 'cancel' buttons.

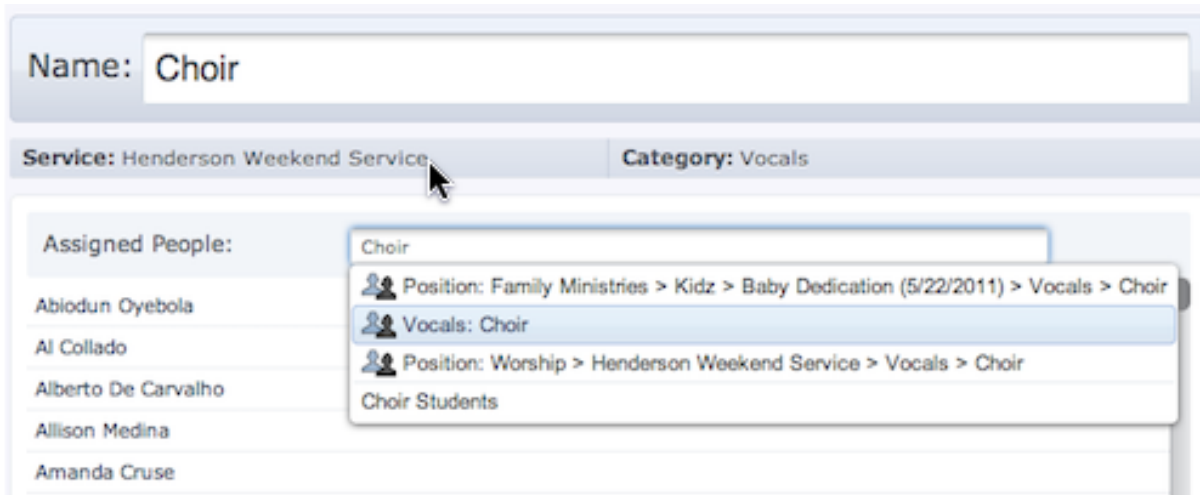
To get started, just edit the People Categories within your plan, and choose to either Assign People Directly or Assigning Using Custom Properties.

Positions: Assign People Directly



The screenshot shows the 'Edit Position' interface. At the top, there is a dark blue header with the text 'Edit Position'. Below this, there is a text input field labeled 'Name:' containing the word 'Choir'. Underneath the name field, there are two tabs: 'Service: Henderson Weekend Service' and 'Category: Vocals'. The main area of the interface is a list of 'Assigned People'. This list is enclosed in a red rectangular border. The list contains the following names: Abiodun Oyebola, Al Collado, Alberto De Carvalho, Allison Medina, Amanda Cruse, Amber Bodine, Amie McGrain, Amy Schuyler, Angie Argubright, and Anysia Romero. A mouse cursor is pointing at the top of the list.

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.

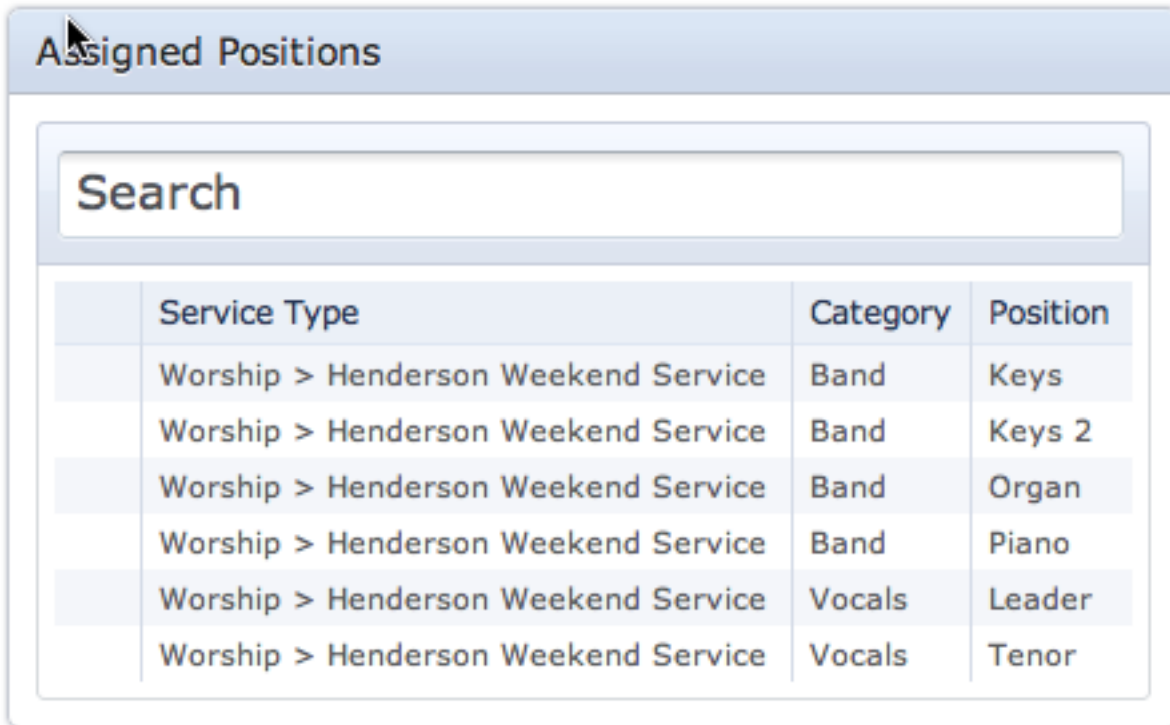


This screenshot shows the same 'Edit Position' interface as the previous one, but with a search dropdown menu open over the 'Assigned People' list. The dropdown menu contains the following items: 'Choir', 'Position: Family Ministries > Kidz > Baby Dedication (5/22/2011) > Vocals > Choir', 'Vocals: Choir', 'Position: Worship > Henderson Weekend Service > Vocals > Choir', and 'Choir Students'. A mouse cursor is pointing at the 'Service: Henderson Weekend Service' tab.

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.

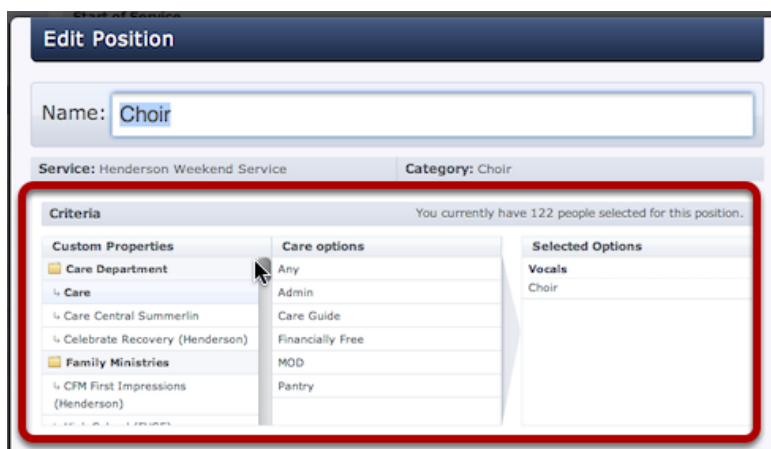
You can assign many people to your position in the edit position box shown above, or you can add a person directly to a position from their profile page using the new Assigned Positions box shown below. (Only categories that have been set to Assign People Directly will have their positions listed in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



The image shows a search box titled "Assigned Positions" with a search input field containing the word "Search". Below the search field is a table with the following data:

Service Type	Category	Position
Worship > Henderson Weekend Service	Band	Keys
Worship > Henderson Weekend Service	Band	Keys 2
Worship > Henderson Weekend Service	Band	Organ
Worship > Henderson Weekend Service	Band	Piano
Worship > Henderson Weekend Service	Vocals	Leader
Worship > Henderson Weekend Service	Vocals	Tenor

Positions: Assign Using Custom Properties



The image shows the "Edit Position" form. The "Name" field contains "Choir". The "Service" is "Henderson Weekend Service" and the "Category" is "Choir". Below this is a "Criteria" section with a red border. It contains three columns: "Custom Properties", "Care options", and "Selected Options". The "Custom Properties" column has a tree view with "Care Department" expanded, showing "Care", "Care Central Summerlin", and "Celebrate Recovery (Henderson)". The "Care options" column has a list: "Any", "Admin", "Care Guide", "Financially Free", "MOD", and "Pantry". The "Selected Options" column has "Vocals" and "Choir". A mouse cursor is pointing at the "Care" option in the "Custom Properties" column.

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 positions based off of who hasn't been scheduled the longest, and avoiding conflicts and block-out dates.

Load a Matrix

Traditional Service

UPCOMING PLANS [view all plans](#)

	SERIES TITLE	PLAN TITLE
copy delete	matrix	
	May 10, 2011	
	May 17, 2011	
	May 24, 2011	
	May 31, 2011	



ATTACHMENTS [create a new plan](#)  [m](#)

-  [05 SOPRANO - HARK!.mp3](#)  [Maid with the Flaxen Hair.mp3](#)
-  [music stand push out.mov](#)

 [Add an attachment](#)

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

Ministry Centered Technologies Traditional Service May 3, 2011	 print needed positions	Ministry Centered Technologies Traditional Service May 10, 2011	
▼ Plan Details			
▼ Order Of Service			
A Beautiful Collision Default Arrangement in G -	0:00	A Beautiful Collision Default Arrangement in G -	0:00
 add an item	0:00	 add an item	0:00
► Plan Notes			



Hover over each plan date, and click on the needed positions 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

The screenshot displays a software interface with a table. At the top right, there are two links: 'auto-schedule' (with a plus icon) and 'email' (with an envelope icon). The table has two columns. The first column contains the text 'Ministry Centered Technologies Traditional Service' and 'May 17, 2011'. The second column contains 'Ministry Centered Technologies Traditional Service', 'May 24, 2011', and 'needed position'. A red arrow points from the 'auto-schedule' link to the second column. Below the table, there are two rows with 'add an item' buttons and '0:00' time indicators. At the bottom, there are two rows with the text '1 person needed'.

		+ auto-schedule ✉ email
	Ministry Centered Technologies Traditional Service May 17, 2011	Ministry Centered Technologies Traditional Service May 24, 2011 needed position
00		
00	+ add an item 0:00	+ add an item 0:
	1 person needed	1 person needed
	1 person needed	1 person needed

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

Auto-schedule

Automatically schedule people for needed positions in the checked categories below. People who have not served recently will be scheduled first, and blocked-out dates and conflicting plans will be taken into account.

Band Vocals

Accept [cancel](#)

1 person needed	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed

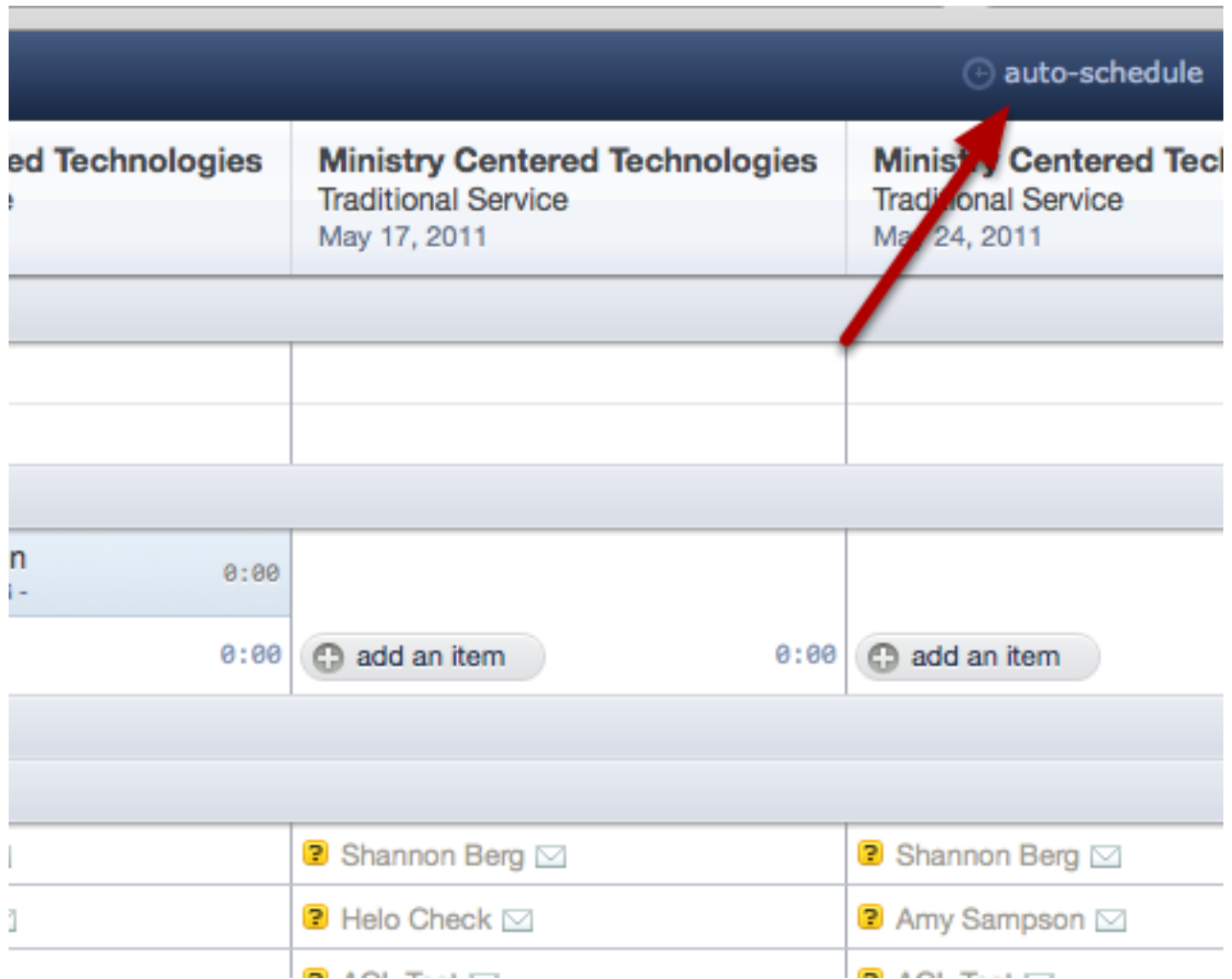
Auto-scheduler will then do the rest!

Traditional Service May 3, 2011	Traditional Service May 10, 2011	Traditional Service May 17, 2011
▼ Plan Details		
▼ Order Of Service		
A Beautiful Collision Default Arrangement in G - 0:00	A Beautiful Collision Default Arrangement in G - 0:00	A Beautiful Collision Default Arrangement in G - 0:00
add an item 0:00	add an item 0:00	add an item 0:00
► Plan Notes		
▼ Band		
Shannon Berg	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed
1 person needed	1 person needed	1 person needed
schedule a person	schedule a person	schedule a person

Find 1 people for **Bass Guitar** on **May 3, 2011**

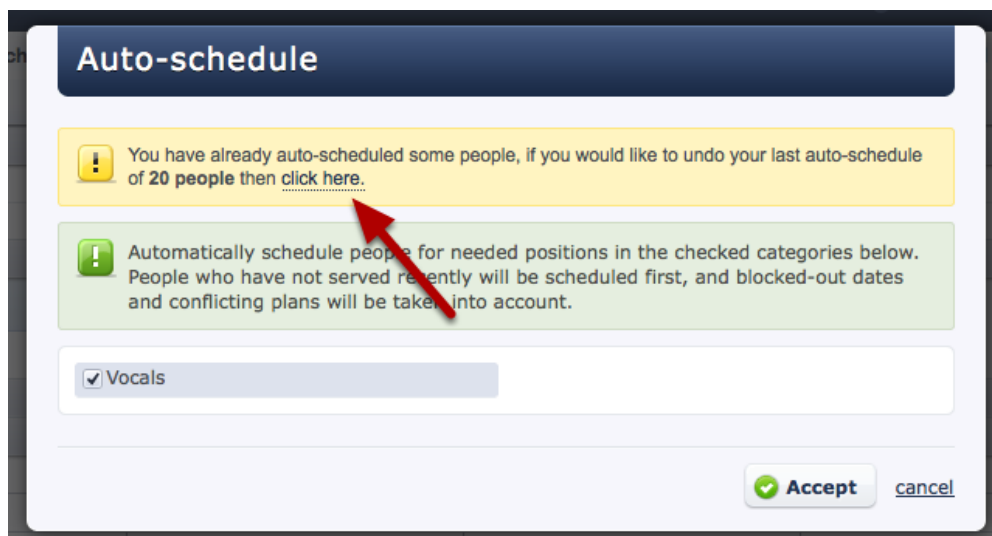
It will fill your needed positions based off of the person who hasn't been scheduled the longest and avoid conflicts and blocked-out dates. If it doesn't fill some of your positions, it is because everyone has a conflict or blocked-out date.

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



The screenshot shows a scheduling interface with a table of categories and dates. At the top right, there is a dark blue header with a white plus sign and the text 'auto-schedule'. A red arrow points from the bottom right towards this header. The table below has three columns. The first column contains 'ed Technologies'. The second column contains 'Ministry Centered Technologies' and 'Traditional Service' with the date 'May 17, 2011'. The third column contains 'Ministry Centered Tec' and 'Traditional Service' with the date 'May 24, 2011'. Below the table, there are rows with '0:00' and 'add an item' buttons. At the bottom, there are rows with names and email icons: 'Shannon Berg', 'Helo Check', and 'Amy Sampson'.

Then click the link in the yellow box



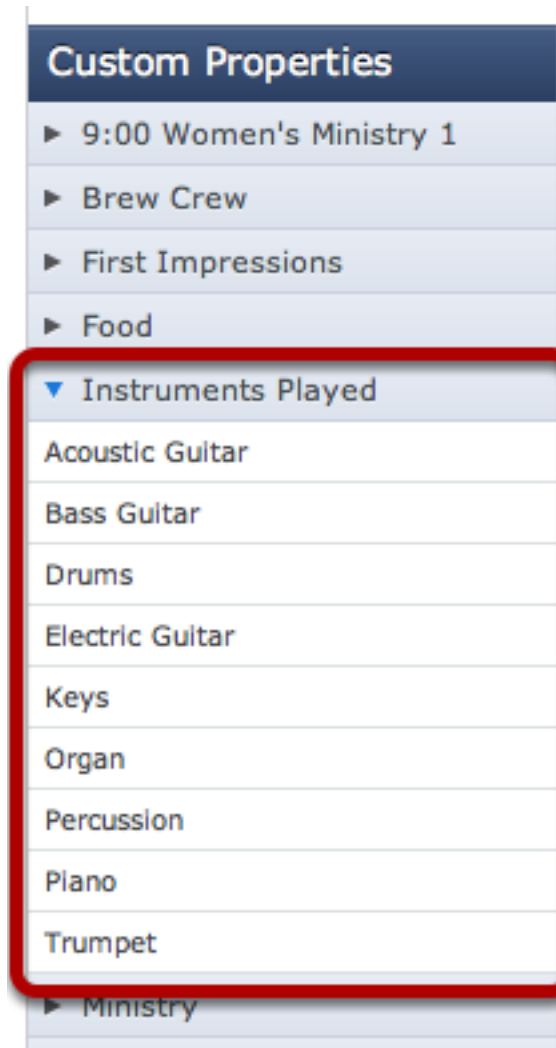
The screenshot shows a dialog box titled 'Auto-schedule'. At the top, there is a dark blue header with the text 'Auto-schedule'. Below the header, there is a yellow warning box with a white exclamation mark icon and the text: 'You have already auto-scheduled some people, if you would like to undo your last auto-schedule of 20 people then [click here](#).' A red arrow points from the bottom right towards this link. Below the yellow box, there is a green information box with a white exclamation mark icon and the text: 'Automatically schedule people for needed positions in the checked categories below. People who have not served recently will be scheduled first, and blocked-out dates and conflicting plans will be taken into account.' Below the green box, there is a checkbox labeled 'Vocals' which is checked. At the bottom right, there are two buttons: 'Accept' with a green checkmark icon and 'cancel'.

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

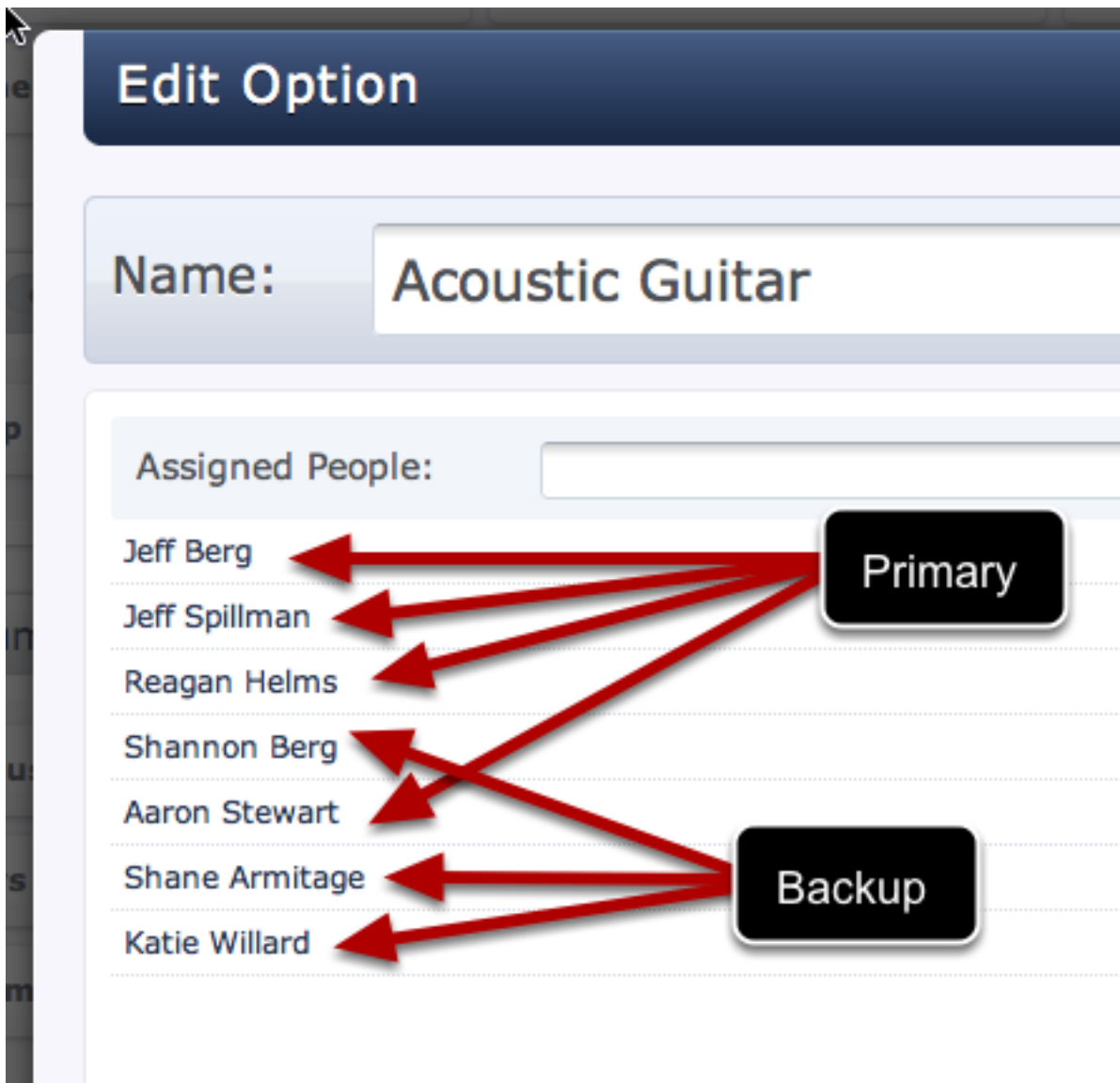
Setting Up Back-Up People for Positions

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.

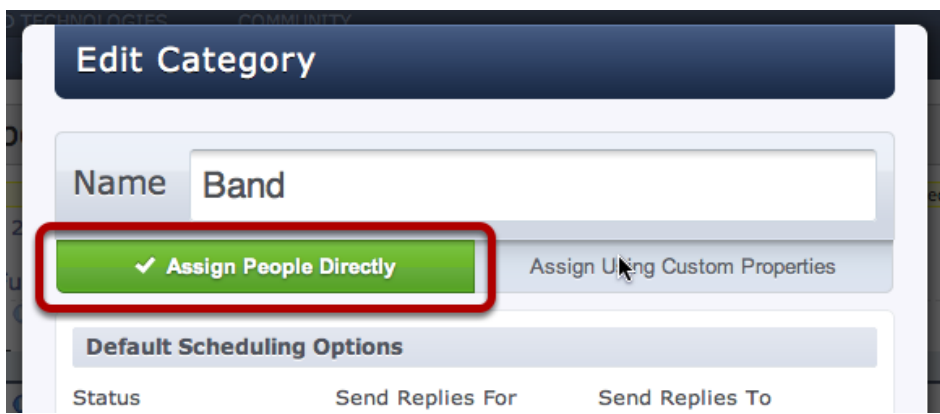
Setup ALL People Using Custom Properties



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"

Edit Position

Name:

Service: Contemporary Service Category: Band

Assigned People:

- Jeff Berg
- Jeff Spillman
- Reagan Helms
- Aaron Stewart

Primary Only

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

Band	
Acoustic Guitar	1 person needed
Bass Guitar	? Amy Sampson ☑
Drums	✓ Jason Terhorst ☑
Electric Guitar	? Jeff Spillman ☑
	? Reagan Helms ☑
Keys	? Shannon Berg ☑
Percussion	
Piano	
+ schedule a person	

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

Select People For Acoustic Guitar

You still need 1 person for the 'Acoustic Guitar' position.

Name	Last used in this Service Type
<input type="checkbox"/> Aaron Stewart Product Manager	November 18, 2011
<input type="checkbox"/> Jeff Berg	December 2 & 10, 2011
<input type="checkbox"/> Jeff Spillman 1 conflict	November 25, 2011
<input type="checkbox"/> Reagan Helms 1 conflict	December 2 & 10, 2011

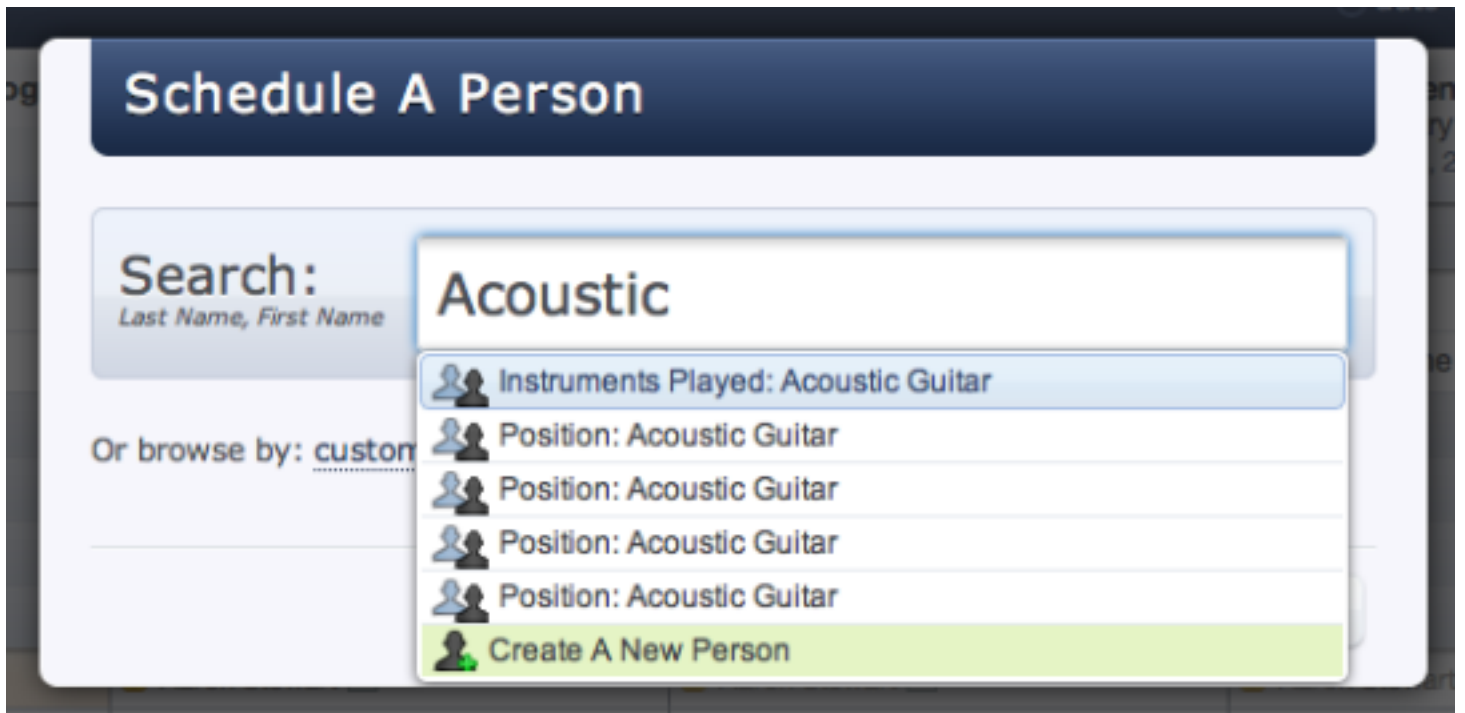
Add



Accept

[cancel](#)

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.



Hopefully, scheduling backup people shouldn't be a regular occurrence, 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.

Browse People

Instruments Played

Acoustic Guitar

Vocal Part

Tech Team

9:00 Women's Ministry

Ministry

Food

First Impressions

Welcome Team

Brew Crew

Sunday 11:00am

Sunday 9:30am

Worship Teams

Apply Filter

NAME

Last used in this Service Type

Aaron Stewart

November 18, 2011

Jeff Berg

December 2 & 10, 2011

Jeff Spillman

1 conflict

November 25, 2011

Katie Willard

November 25, 2011

Reagan Helms

1 conflict

December 2 & 10, 2011

Shane Armitage

November 18, 2011

Shannon Berg

1 conflict

November 18, 2011

◀ prev | next ▶

+ Add All to Plan

[cancel](#)

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 clicking 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



The screenshot shows the planning center interface for the First Church of La Quinta. The top navigation bar includes the 'planning center' logo and tabs for 'plans', 'songs', 'media', 'people', 'songs', and 'media'. The 'people' tab is highlighted with a red arrow. Below the navigation bar, the page title 'First Church Of La Quinta' is displayed. The main content area features a list of ministry categories: 'Children's Ministry', 'Other Productions', 'Student Ministries', and 'Weekend Worship Services'. On the left side, there is a 'Pending Requests' section with a notification about 2 scheduling requests and a 'My Calendar' section showing a calendar for May 2011.

planning center

FIRST CHURCH OF LA QUINTA COMMUNITY

plans songs media **people** songs media

First Church Of La Quinta

Children's Ministry

Other Productions

Student Ministries

Weekend Worship Services

Pending Requests

You have 2 scheduling requests that you have not responded to. **Please click here to respond.**

My Calendar

May, 2011

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21


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

First Church Of La Quinta People

<u>Permissions</u>	<u>First Name</u>	<u>Last Name</u>
ADMINISTRATOR	Aaron	Stewart
SCHEDULED VIEWER	Anthony	Prochaska
VIEWER	Ashley	Tallungan
VIEWER	Aubrey	Wentz
ADMINISTRATOR	Dave	Petrie
ADMINISTRATOR	Demo	Account
ADMINISTRATOR	iPhone	Tester
ADMINISTRATOR	iPhone	Tester 2
VIEWER	Jason	Beddall
SCHEDULED VIEWER	Jason	Berg
VIEWER	Jeff	Berg
VIEWER	Jeff	Spill
VIEWER	Jenn	Cole
SCHEDULED VIEWER	Jordan	Smith

And change their 'Site Permission' to 'Disabled'

Personal Information



Jeff Berg

Last update 9 months ago
Last login about 5 years ago

+ add photo

Change Password

First name:

Last name:

Notes:

Notes are only visible & editable by schedulers.

Permissions

[Click here for an explanation of the permissions](#)

Site Permissions	Viewer
+ Children's Ministry	Disabled
+ Other Productions	Scheduled Viewer
+ Student Ministries	Viewer
+ Weekend Worship Services	Scheduler
	Editor
	Administrator
	Same As Parent

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

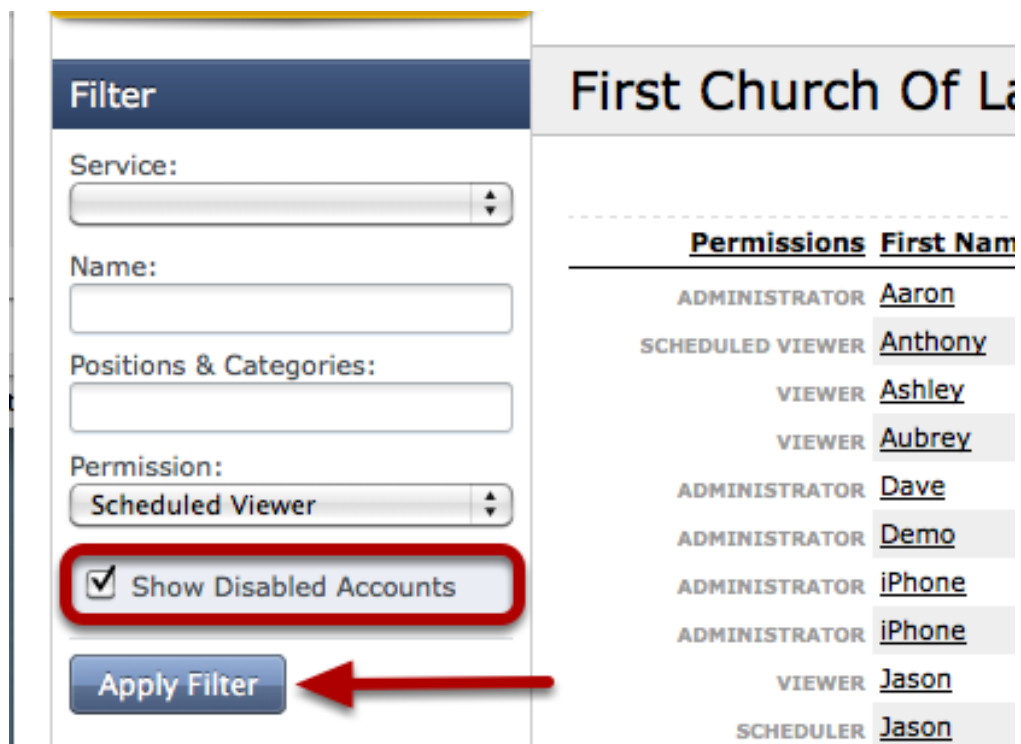
This lesson will show you how to Enable a User that exists in your account, but has been disabled in the past.

(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.

You are filtering your people to the people that have **disabled** accounts. [To clear this filter click here.](#)

<u>Permissions</u>	<u>First Name</u>	<u>Last Name</u>	<u>E-Mail Address</u>
DISABLED	Cuddles	Berg	katie@ministrycentered.com
DISABLED	Joshua	Davidson	lightmanx555@gmail.com
DISABLED	Raleigh	Willard	rkwillard15@gmail.com

3 people f

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

Permissions

[Click here for an explanation of the permissions](#)

Site Permissions	Disabled
+ Children's Ministry	Disabled Scheduled Viewer Viewer Scheduler Editor Administrator
+ Other Productions	
+ Student Ministries	
+ Weekend Worship Services	Same As Parent
New Service	Same As Parent

Access Plan Files Access Song Streams & Files
 Access Media Streams & Files

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

First Church Of La Quinta

matrix create a folder create a service

Other Productions

Contemporary Service

UPCOMING PLANS	SERIES TITLE	PLAN TITLE	
November 1, 2009			Katie Willard 4 minutes ago
November 8, 2009			Katie Willard 4 minutes ago
November 15, 2009			Katie Willard minutes ago

ATTACHMENTS

create a new plan matrix archives reports properties
link to an attachment upload an attachment

Main Auditorium

UPCOMING PLANS	SERIES TITLE	PLAN TITLE	
October 25, 2009			Katie Willard 5 minutes ago

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 individual plan pages.

Inside a Plan.

Times

- Plan Times
 - Traditional Service 5/5 at 9:00am
 - Traditional Service 5/5 at 11:00am
- Rehearsal Times
 - Worship Team Practice 4/26 at 7:00pm
- Other Times
 - Call Time 4/28 at 8:00am
- Add a time

People

- Audio/Visual 9AM
 - send 0 0 3
- Choir
 - send 9 0 0
- Instruments Played
 - send 0 0 7
- Tech 11AM
 - send 1 1 1
- Audio
 - Katie Willard
- Producer
 - Aaron Stewart
- Stage Manager
 - Reagan-Heims
 - 1 more person needed
- Vocals

La Quinta/Main Campus

May 5, 2011

No series title set - click here to change

No plan title set - click here to change

Public Access: Disabled | T your #Wc

add an item rehearse matrix live print

Pre-Service

5/5	Length		
9:00a	in mins		
8:50a	10	Prelude	
		<i>Piano Hymns by Debbie</i>	

Worship Set

9:00a	3:45	Amazing God [D]	3 att
9:03.45a	4:15	Cannons	3 att
		<i>Test note</i>	
9:08a	1:30	Prayer by Pastor Mike	
		<i>Band continues to play.</i>	
9:09.30a	3:30	The Wonderful Cross	1 att
9:13a	4	Indescribable	

Message

9:17a	5:30	Announcements	
		<i>Youth Camp coming up- need donations</i>	
		<i>Church Potluck next week immediately after service</i>	
9:22.30a	1	Test	
9:23.30a	1:20	Intro Video	
9:24.50a	40	Message by Pastor Carl	
		<i>blue mic</i>	

Closing

10:04.50a	0	All Hail The Power Of Jesus' Name [D]	2 att
10:04.50a	0	Better Is One Day [D]	2 att
10:04.50	64:50		adc

- Times:** This area is the Times box. It allows you to edit your current dates/times and add new ones.
- 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.
- 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.
- Songs:** Songs that are added from your Songs database are always listed in blue.
- 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.
- Item Note Categories:** You can arrange your own and have them display in the plan or not display in the plan.
- 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

First Wednesday

UPCOMING PLANS [view](#)

[all plans](#)

March 2, 2011

SERIES TITLE

PLAN TITLE

Night of Worship

Drew Bodine
5 days ago

April 6, 2011

Night of Worship

Drew Bodine
5 days ago

May 4, 2011

Night of Worship

Drew Bodine
5 days ago

ATTACHMENTS

[+ create a new plan](#) [matrix](#) [reports](#) [properties](#)

[+ link to an attachment](#) [+ upload an attachment](#)

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

Add at least 1 new regular plan.

Create A New Plan

Template

[Manage Your Templates](#)

Quantity:

Default

1

[Change the dates for this new plan](#)

[Accept](#)

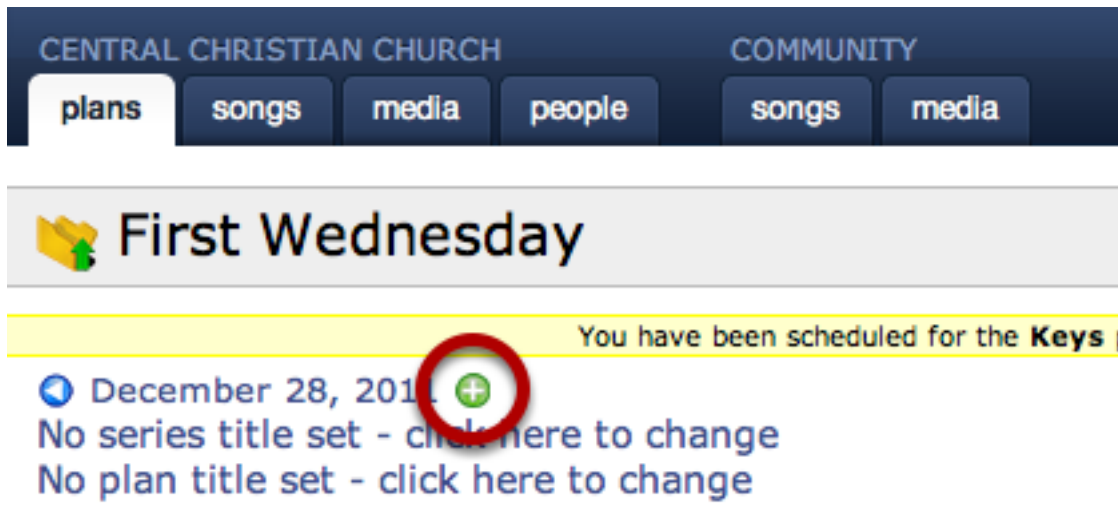
[cancel](#)

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




CENTRAL CHRISTIAN CHURCH COMMUNITY

plans songs media people songs media

First Wednesday

You have been scheduled for the **Keys**

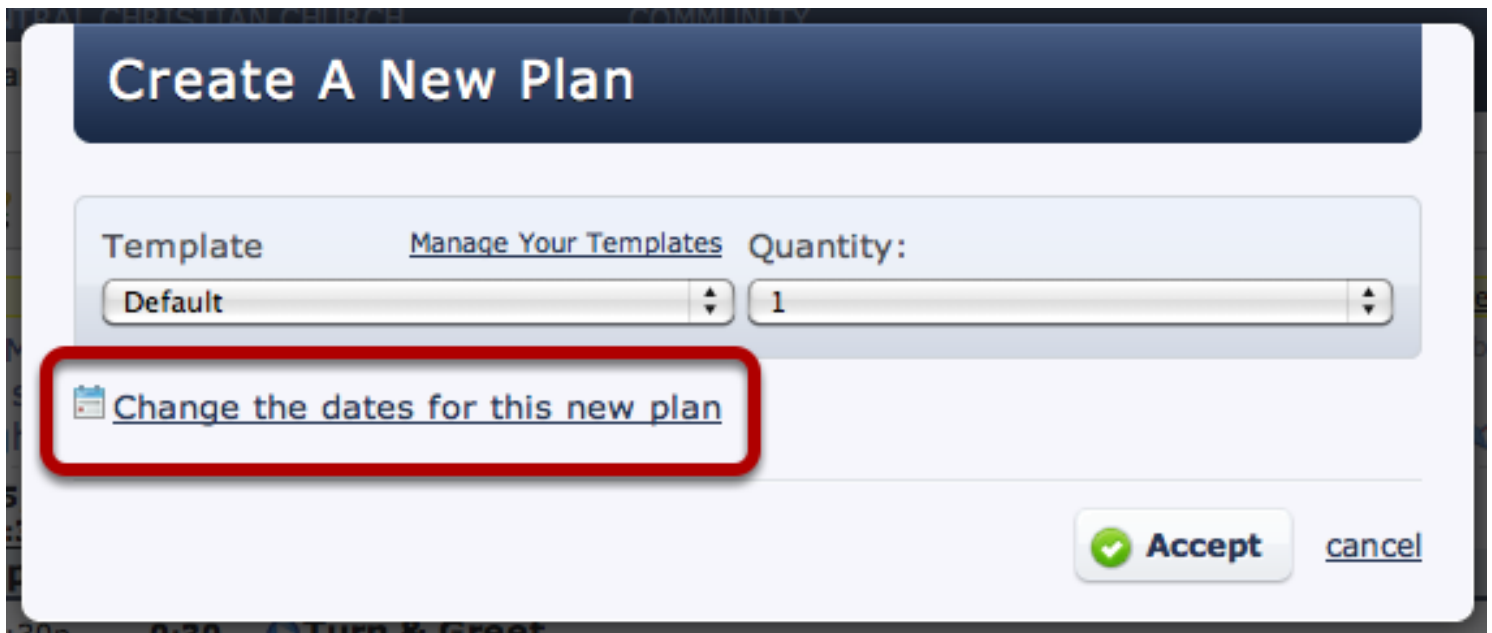
December 28, 2014 

No series title set - [click here to change](#)

No plan title set - [click here to change](#)

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"




Create A New Plan

Template [Manage Your Templates](#) Quantity:

Default 1

 [Change the dates for this new plan](#)

 **Accept** [cancel](#)


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

Create A New Plan

Template [Manage Your Templates](#) Quantity:

Default 1

Plan Date	Service Times	Rehearsal Times
12/24/2011 	Service 12/25/2011 6:30p	12/24/2011 5:00p 12/24/2011 3:30p 12/25/2011 4:00p 12/25/2011 5:00p 12/25/2011 5:30p 12/25/2011 6:10p



[cancel](#)

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

Times

▼ Plan Times

Service
12/24 at 6:30pm

▼ Rehearsal Times

Band Rehearsal
12/23 at 5:00pm

Tech Call
12/24 at 3:30pm

Band & Vocal Downbeat
12/24 at 4:00pm

Add a time

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.

First Wednesday

UPCOMING PLANS [view all](#)

[plans](#)

March 2, 2011

SERIES TITLE

PLAN TITLE

Night of Worship

April 6, 2011

Night of Worship

May 4, 2011

Night of Worship

December 24, 2011

Christmas Eve

December 28, 2011

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'.

East Valley Campus

UPCOMING PLANS [view all plans](#)

	SERIES TITLE	PLAN TITLE
October 1, 2010		
October 8, 2010		
October 15, 2010		
October 22, 2010		
October 29, 2010		
November 5, 2010		
November 12, 2010		
November 19, 2010		

ATTACHMENTS

[+ create a new plan](#) [+ link to an attach](#)

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

	SERIES TITLE	PLAN TITLE
No dates		
November 3, 2010	Philipplans	Finding Joy

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.

Contemporary Service		
UPCOMING PLANS	SERIES TITLE	PLAN TIT
November 29, 2009		
November 22, 2009		
November 15, 2009	Romans	Romans Cl
November 8, 2009	Romans	Romans Cl
November 1, 2009	Romans	Romans Cl
August 26, 2009		
August 19, 2009		
August 12, 2009	Series One	Plan One
August 5, 2009		

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

When you click Copy:

Copy the November 1, 2009 plan

To Service Type	As a	Quantity
<input type="text" value="La Quinta/Main Campus: Weekend Worship Services"/>	<input type="text" value="Plan"/>	<input type="text" value="1"/>

What To Copy

<input checked="" type="checkbox"/> Plan Items	<input checked="" type="checkbox"/> Plan Notes	<input checked="" type="checkbox"/> Plan People
--	--	---

[cancel](#)

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

The screenshot shows the Planning Center interface for 'FIRST CHURCH OF LA QUINTA'. The main navigation bar includes 'plans', 'songs', 'media', 'people', 'songs', and 'media'. The user is logged in as 'Katie Willard'. The current view is 'Contemporary Service' with a 'Default Template' selected, indicated by a red arrow. The service plan details are as follows:

Length in mins	Item	Audio/Visual Notes
15	Pre-Service CD Playing	
Worship Set		
4:30	Amazing God [D]	4
3:30	All Creatures Of Our God And King	1
3:45	Friend Of God	
4	Announcements	
1	Meet and Greet <i>Band Playing</i>	
4	I Am Free [D]	
Message		
30	Pastor's Message	
1	Ending Prayer	
51:45		

On the left, the 'People' section lists various roles and their status:

- Audio/Visual**: 0 green, 1 red, 0 blue, 2 down arrows
- Band 9AM**: 0 green, 1 red, 0 blue, 0 down arrows
- Hospitality 9AM**: 0 green, 1 red, 0 blue, 0 down arrows
- Instrumentalists**: 0 green, 1 red, 0 blue, 0 down arrows
- Vocals**: 0 green, 1 red, 0 blue, 3 down arrows
- Alto**: Jeff Berg, Karen Trostad, Katie Willard
- Bass**: 3 more people needed
- Soprano**: 3 more people needed
- Tenor**: 3 more people needed
- Worship Leader**: 1 more person needed

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:

Contemporary Service

November 15, 2009 Public Ac

Romans
Romans Ch. 12

11/15 9:00a	11/15 11:00a	Length in mins	
9:00a	11:00a	5	Announcements
9:05a	11:05a	4	Offering
9:09a	11:09a	2:30	Here In Your Presence [D]
9:11.30a	11:11.30a	0	Grace Like Rain: I Worship Flexx
9:11.30a	11:11.30a	11:30	

Audio/Visual Notes	Band Notes	Speaker Notes
		Red Mic, try to keep it under 5 mins.
	Aaron leads	

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

Piano Hymns by Debbie

Worship Set

9:00a	3:45	Amazing God [D]
9:03.45a	4:15	Cannons 
9:08a	1:30	Prayer by Pastor Mike <i>Band continues to play.</i>
9:09.30a	3:30	The Wonderful Cross
9:13a	4	Indescribable

Message

9:17a	5:30	Announcements <i>Youth Camp coming up- need donations Church Potluck next week immediately after service</i>
-------	------	---

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

Editing Item

Cannons

4 : 15
min sec

During Service

Item Description

Detail


Blank

 edit

Item Notes



Band

 add another note

CCLI Reporting:

0

Single Print

0

Print Collected

0

Projection Master

0

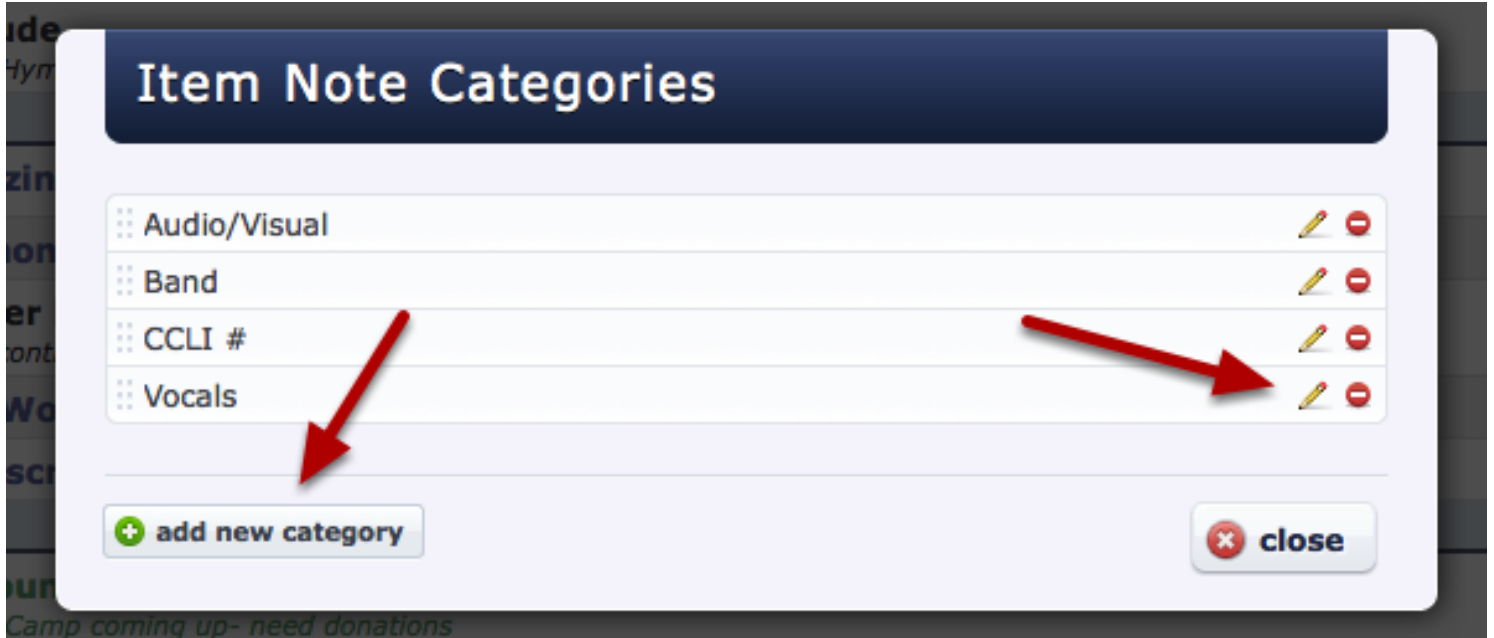
Custom
Arrangement

0

Recording

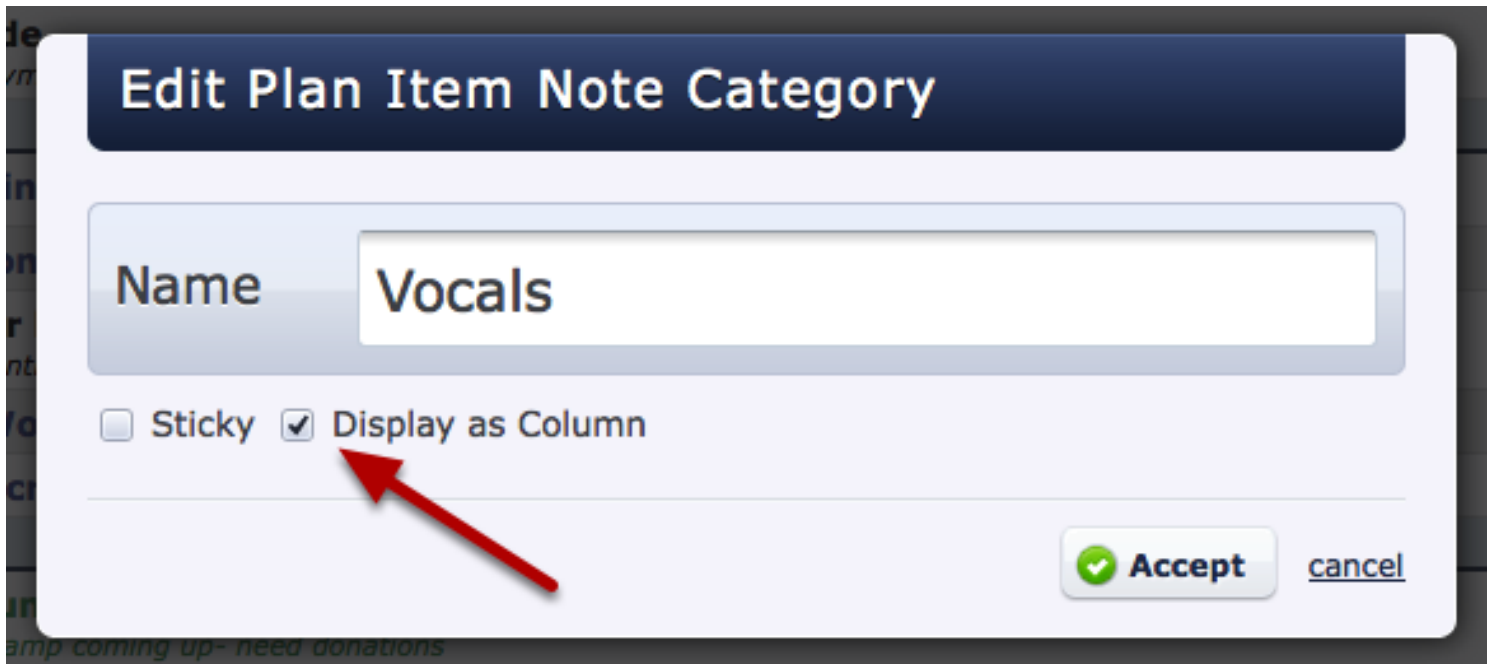
** Please remember that you are assigning one credit per usage type, not per number of copies made.*

Click the pencil next to the Item Note Category that you would like to create 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.

[+ add an item](#) [rehearse](#) [matrix](#) [live](#) [print this plan](#)

S

Band Notes	Speaker Notes	Vocals Notes
	Red Mic, try to keep it under 5 mins.	
	Aaron leads	

1 note
1 attachment

1 attachment

1 note

presence [D]

I Worship Flexx

[+ add an item](#)

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.

[June 24, 2011](#)



[July 1, 2011](#)


[July 8, 2011](#)

[July 15, 2011](#)



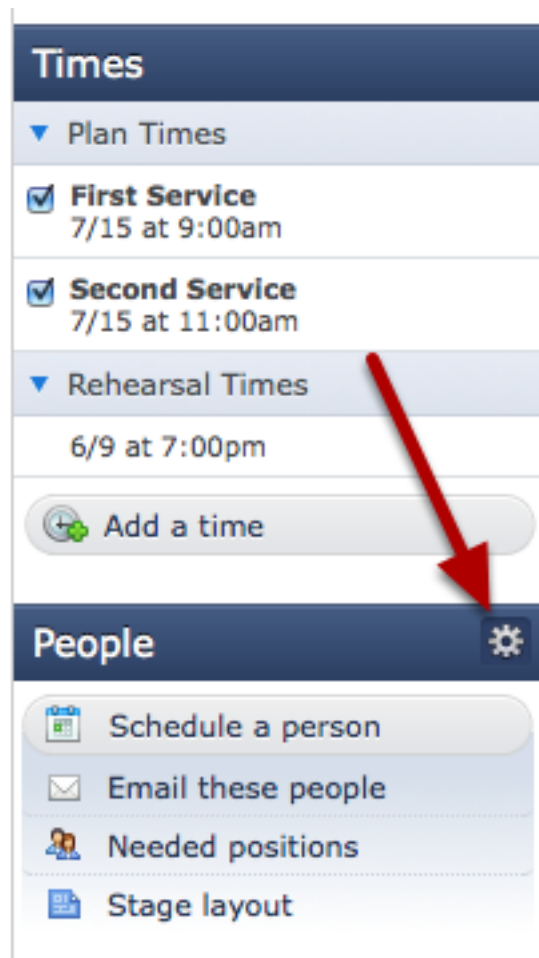
ATTACHMENTS

 [05 SOPRANO - HARK!.mp3](#)  [DSC 0084.JPG](#)

 [Schedule.docx](#)

 [Add an attachment](#)


Hover over 'People' and click on the gear icon



The screenshot shows a software interface with two main sections: 'Times' and 'People'. The 'Times' section is expanded, showing a list of services and rehearsal times. The 'People' section is collapsed, but a gear icon is visible in its header. A red arrow points from the 'Add a time' button in the 'Times' section down to the gear icon in the 'People' section.

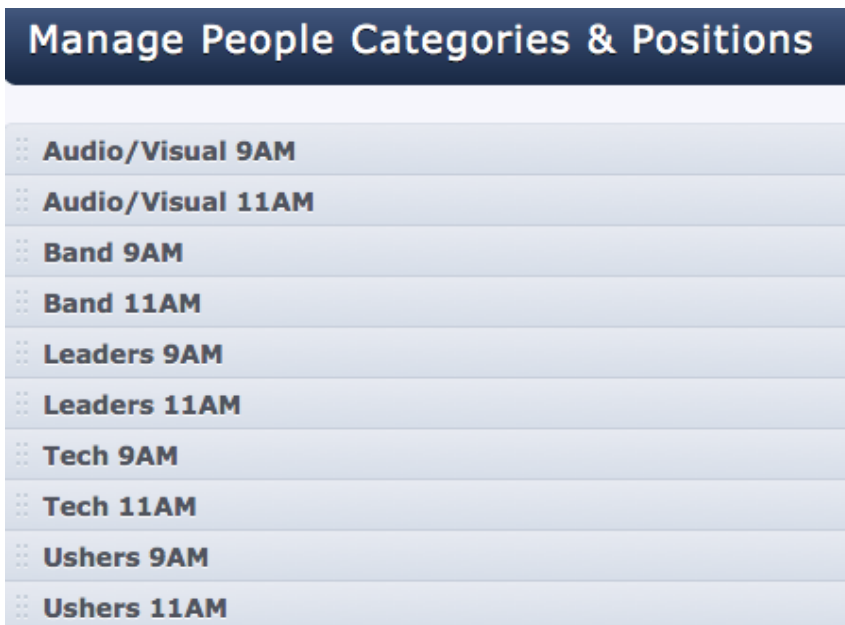
Times

- ▼ Plan Times
- First Service**
7/15 at 9:00am
- Second Service**
7/15 at 11:00am
- ▼ Rehearsal Times
- 6/9 at 7:00pm
-

People 

-
-
-
-

Create Categories for each of your groups and times



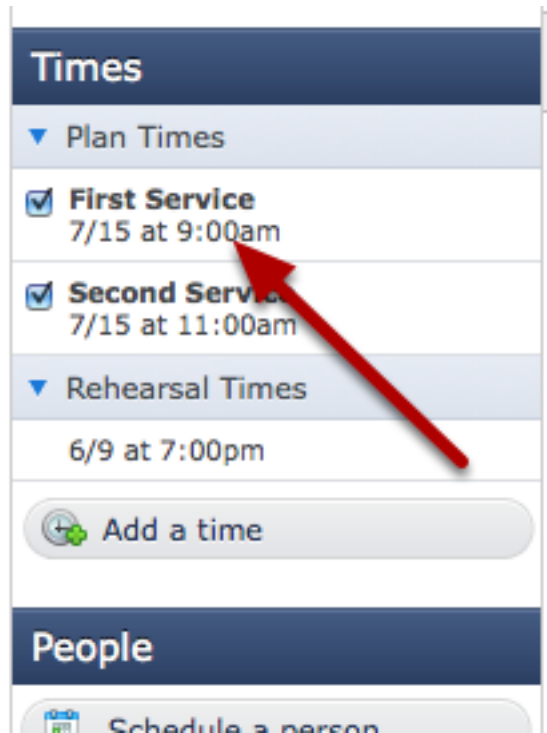
The screenshot shows a software interface titled 'Manage People Categories & Positions'. It displays a list of categories, each with a three-dot menu icon to its left.

Manage People Categories & Positions

- ⋮ **Audio/Visual 9AM**
- ⋮ **Audio/Visual 11AM**
- ⋮ **Band 9AM**
- ⋮ **Band 11AM**
- ⋮ **Leaders 9AM**
- ⋮ **Leaders 11AM**
- ⋮ **Tech 9AM**
- ⋮ **Tech 11AM**
- ⋮ **Ushers 9AM**
- ⋮ **Ushers 11AM**


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.

Editing Time

Date: 

Time: to

Type:

Name:

Assigned People Categories

Check All Uncheck All

<input checked="" type="checkbox"/> Audio/Visual 9AM	<input type="text" value="No Reminder"/>
<input type="checkbox"/> Audio/Visual 11AM	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Band 9AM	<input type="text" value="No Reminder"/>
<input type="checkbox"/> Band 11AM	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Leaders 9AM	<input type="text" value="No Reminder"/>
<input type="checkbox"/> Leaders 11AM	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Tech 9AM	<input type="text" value="No Reminder"/>
<input type="checkbox"/> Tech 11AM	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Ushers 9AM	<input type="text" value="No Reminder"/>
<input type="checkbox"/> Ushers 11AM	<input type="text" value="No Reminder"/>

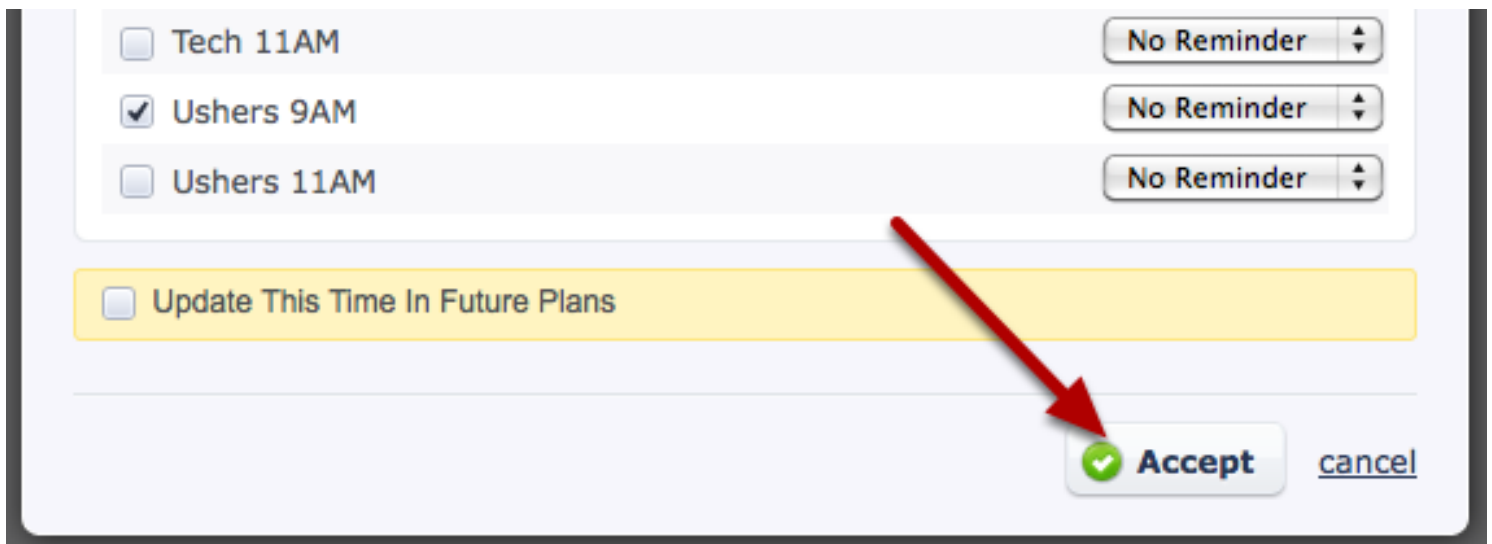
Update This Time In Future Plans

Accept [cancel](#)

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.



The screenshot shows a scheduling interface with the following elements:

- A list of tasks with checkboxes and reminder dropdowns:
 - Tech 11AM (No Reminder)
 - Ushers 9AM (No Reminder)
 - Ushers 11AM (No Reminder)
- A yellow highlighted bar containing the checkbox: Update This Time In Future Plans
- At the bottom right, there is a button with a green checkmark and the text "Accept", followed by a blue underlined link "cancel".


A red arrow points from the "Update This Time In Future Plans" checkbox down to the "Accept" button.

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.

Editing Scheduled Person

 **Reagan Helms**


Confirmed Unconfirmed Declined

Category [add a category](#) **Position**

Audio/Visual 11AM Video Switcher

Replies To: Dave Petrie **Prepare Notification:** Check to prepare notifications

Notes:

 After you have scheduled this person and sent the notification you can come back to this dialog and find out when the notification was read and responded to.

Accept [cancel](#)

Service Times

- First Service
- Second Service

Rehearsal Times

- 6/9 at 7:00pm

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 unavailable for a particular service time.

Changing the Replies To person for a People Category


Click on a plan

UPCOMING PLANS [view all plans](#) **SER**

[March 31, 2011](#)

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)  [matrix](#)

[April 28, 2011](#)

[May 5, 2011](#)

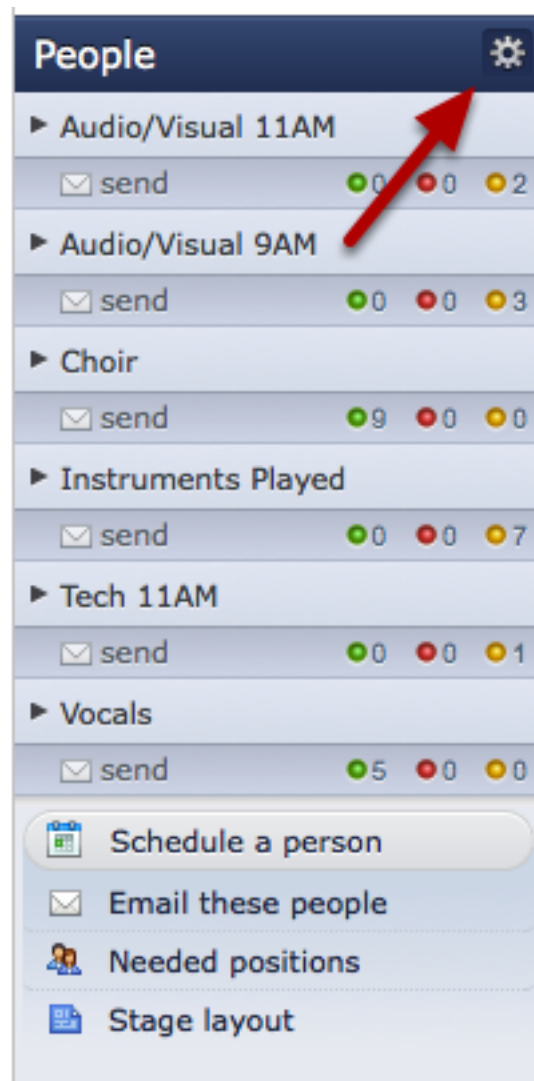
[May 12, 2011](#)

[May 19, 2011](#)

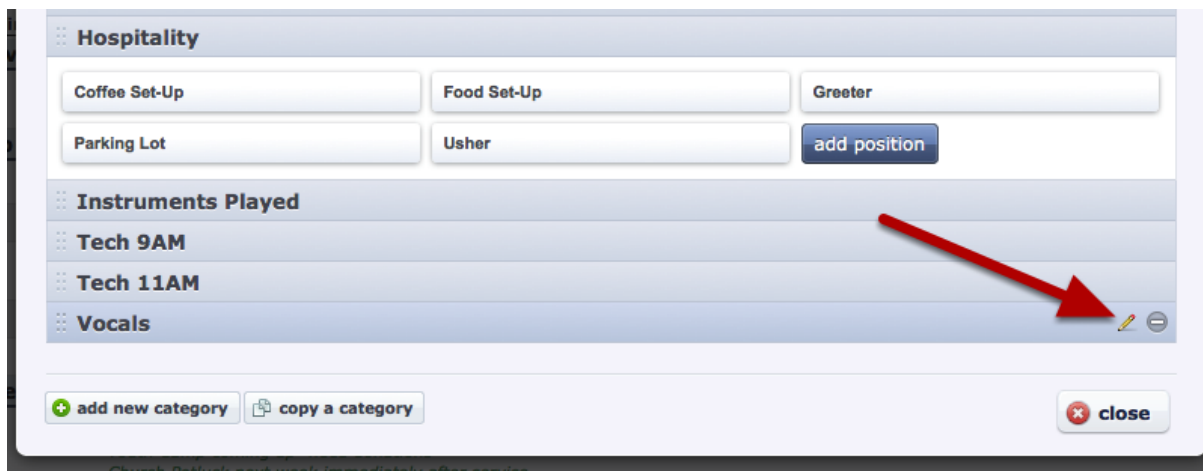
[May 26, 2011](#)

copy
delete

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'

Default Scheduling Options

Status	Send Replies For	Send Replies To
<input type="text" value="Unknown"/>	<input checked="" type="checkbox"/> Accept <input checked="" type="checkbox"/> Decline	Laura Bodine pick a different person clear <input type="checkbox"/> Update future schedules

Scheduled Viewers See

Prepare Notification

Stage Layout Options

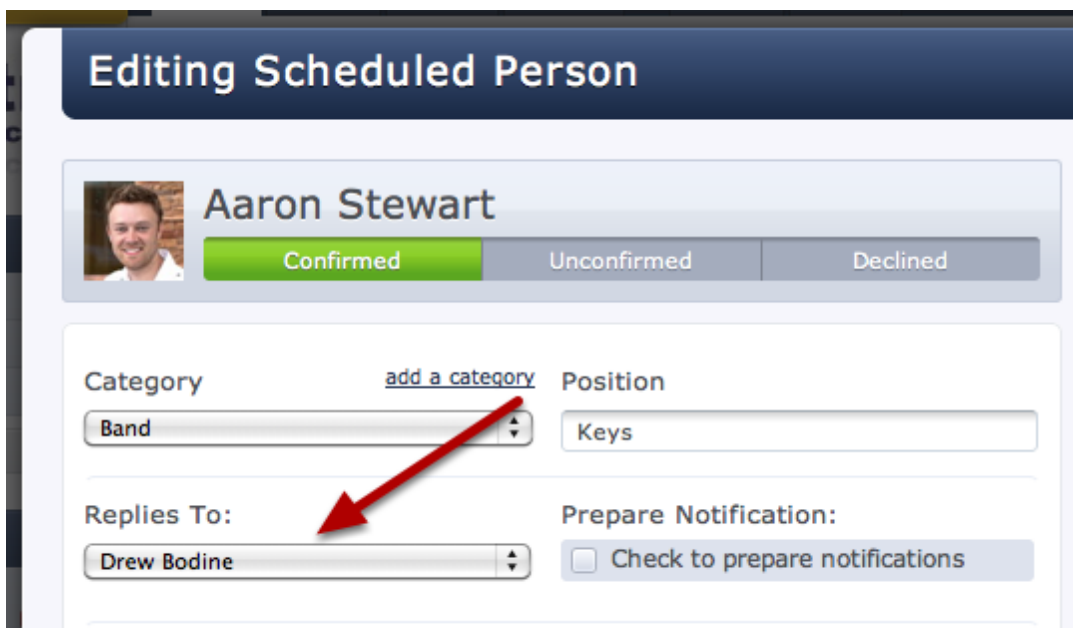
Stage Icon

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

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



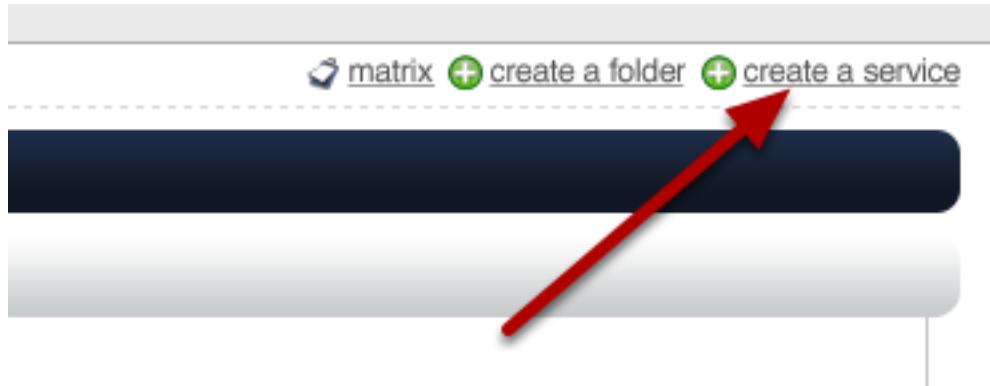
Change the Replies to person manually, then click accept.



Creating a New Service Type

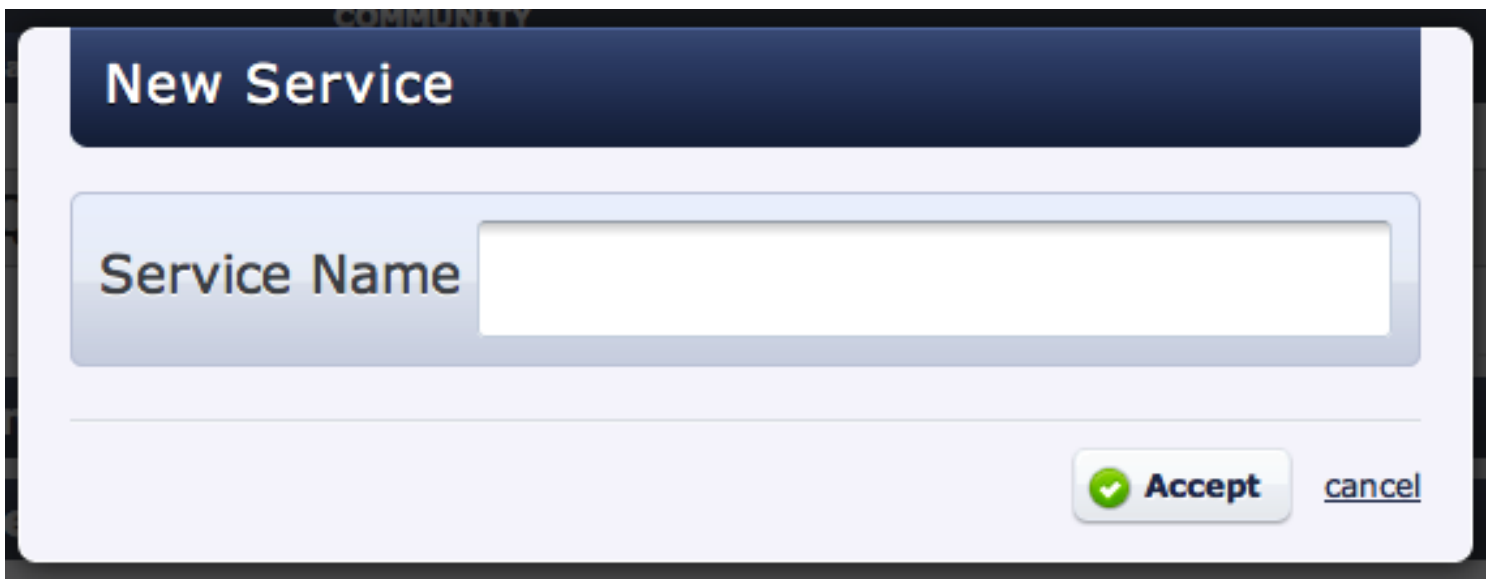
This lesson shows you how to create another service in your account.

Click on 'Create a Service'.



Note: Only Administrators have this option.

Name your Service and click Accept.

A screenshot of a 'New Service' dialog box. The dialog has a dark blue header with the text 'New Service'. Below the header is a light blue rounded rectangle containing the text 'Service Name' and an empty input field. At the bottom right of the dialog are two buttons: a green checkmark icon followed by the text 'Accept', and the text 'cancel'.

Service and first plan have been created.



Video Cafe Main Auditorium

No dates 

No series title set - [click here to change](#)


No plan title set - [click here to change](#)



Step 1: Add Times

Before you begin planning your plan you will need to add the times when this plan will start. You can have unlimited times for each plan. The next time you make a plan for this ministry it will automatically have the times added for you.

Hint: Do you like keyboard-shortcuts? If so hit Control-Alt-T to add a time!

Length
in mins 

0

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

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)

[April 28, 2011](#)



[May 5, 2011](#)

[May 12, 2011](#)

[May 19, 2011](#)

[May 26, 2011](#)

ATTACHMENTS

  [Datatabase Backup.zip](#)

 [Add an attachment](#)

Note: Only Administrators will have access to this icon.

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

Edit Service Type

Service Title

Folder Frequency Attachment types Comment permissions

Load the matrix with previous and next plans.

[Delete this service type](#)

[cancel](#)

To Edit your service properties...

Edit Service Type

Service Title 1

Folder 2 Frequency 3 Attachment types 4 Comment permissions 5

Load the matrix with previous and next plans. 6

[Delete this service type](#) 7

[cancel](#)

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

The screenshot displays the 'Henderson Weekend Service' plan in the Planning Center. The interface includes a sidebar on the left with navigation options for 'Times' (Plan Times, Rehearsal Times, Other Times) and 'People' (Leaders, Host, Music Director, Producer, Production Director, Speaker, Worship Leader, Band). The main content area shows the plan details for June 25 & 26, 2011, with the title 'Fighting Spiritual Boredom'. A table lists the service items with their durations, titles, and associated personnel. A red banner at the top indicates a declined position for 'Drew Bodine'.

Length in mins		Person	Notes
	Start of Service		
1	One Intro <i>start one minute prior to downbeat</i>	Video Team	2 notes 1 attachment
3:30	One [Ab]	Drew & Worship Team	2 notes 9 attachments
5	Always [B]	Drew & Worship Team	2 notes 9 attachments
4	Rise And Sing [B]	Drew & Worship Team	2 notes 8 attachments
0:15	Turn & Greet	Drew Bodine	2 notes
0:15	Video Bumper: Central Branding	Video Team	2 notes
1:30	Welcome & Offering Comments	Mike Bodine	2 notes
1:30	Offering & Announcements	Mike Bodine	2 notes
0:30	Prayer	Mike Bodine	2 notes
6	With Everything [B]	Drew & Worship Team	2 notes 12 attachments
3	Masks	Video Team	2 notes 1 attachment
35	Message / Prayer	Jud Wilhite	2 notes
1	Next Steps / Dismissal	Jud Wilhite	2 notes
61:30			add an item

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)

The screenshot shows the top navigation bar of the Planning Center. The 'plans' button is highlighted with a red box. Below the navigation bar, the 'Henderson Weekend Service' plan is visible.

Click "templates" for your Service Type

First Wednesday

UPCOMING PLANS

[view all plans](#)

[September 7, 2011](#)

SERIES TITLE

PLAN TITLE

Drew Bodine
about 1 month ago



ATTACHMENTS


 [Add an attachment](#)

 [create a new plan](#)  [matrix](#)  [report](#)  [templates](#)  [properties](#)

Click "create a new template"

First Wednesday Templates

Default  

 [create a new template](#)

 [close](#)

Give Your Template a Name

New Template

Template Name

 [Accept](#) [cancel](#)

Then click Accept

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

First Wednesday

New Template

Length in mins
0

- + add an item
- + add a header
- + add a song
- + add media
- apply a template

Choose your recently visited plan from the list

Apply A Template

Template

First Wednesday Templates

- ✓ Default

Recent Plans

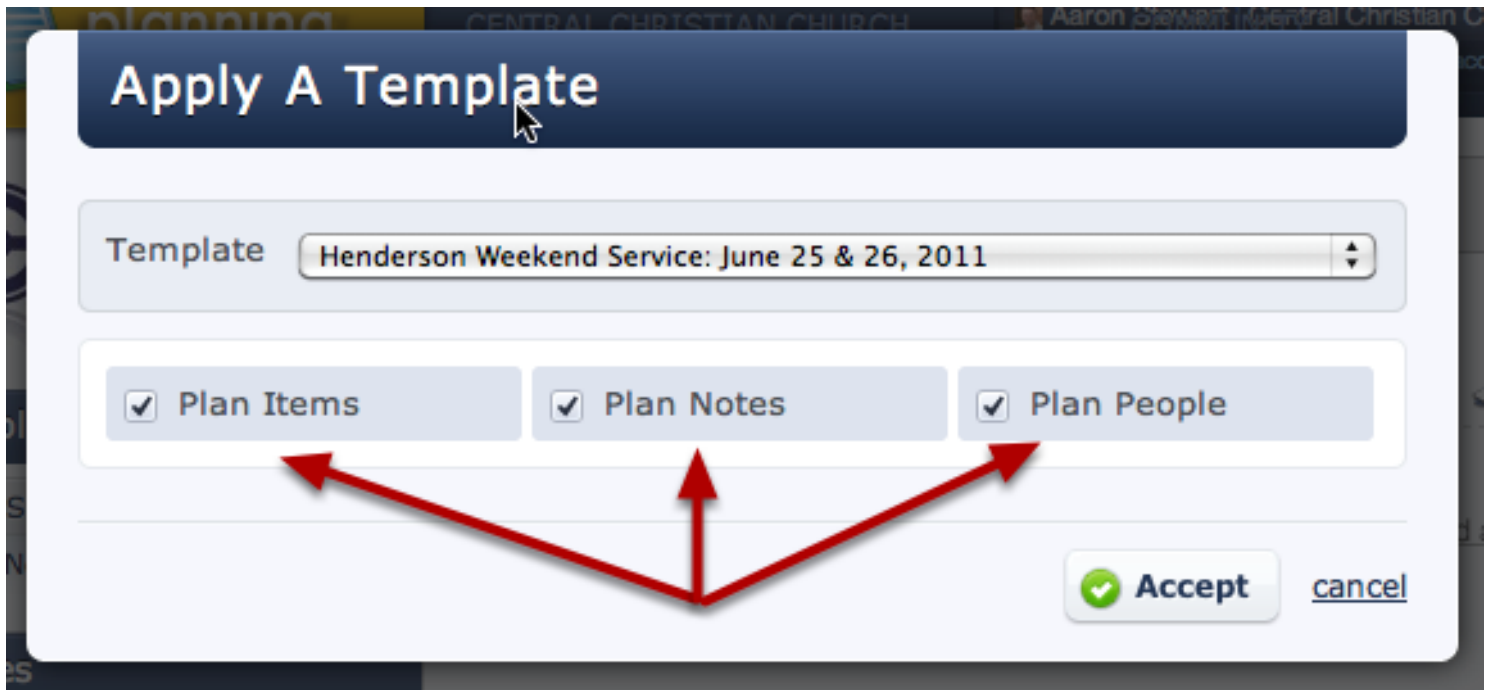
- Henderson Weekend Service: June 25 & 26, 2011
- Henderson Weekend Service: July 2 & 3, 2011
- Henderson Weekend Service: September 17 & 18, 2011

Plan Items

Accept cancel

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

central christian church

First Wednesday

New Template

add an item copy

Length in mins

Start of Service	Item	Notes	Attachments
1	One Intro <i>start one minute prior to downbeat</i>	2 notes	1 attachment
3:30	One [Ab]	2 notes	9 attachments
5	Always [B]	2 notes	9 attachments
4	Rise And Sing [B]	2 notes	8 attachments
0:15	Turn & Greet	2 notes	
0:15	Video Bumper: Central Branding	2 notes	
1:30	Welcome & Offering Comments	2 notes	
1:30	Offering & Announcements	2 notes	
0:30	Prayer	2 notes	
6	With Everything [B]	2 notes	12 attachments
3	Masks	2 notes	1 attachment
35	Message / Prayer	2 notes	
1	Next Steps / Dismissal	2 notes	

To create a new plan based on this template, see [this lesson](#).

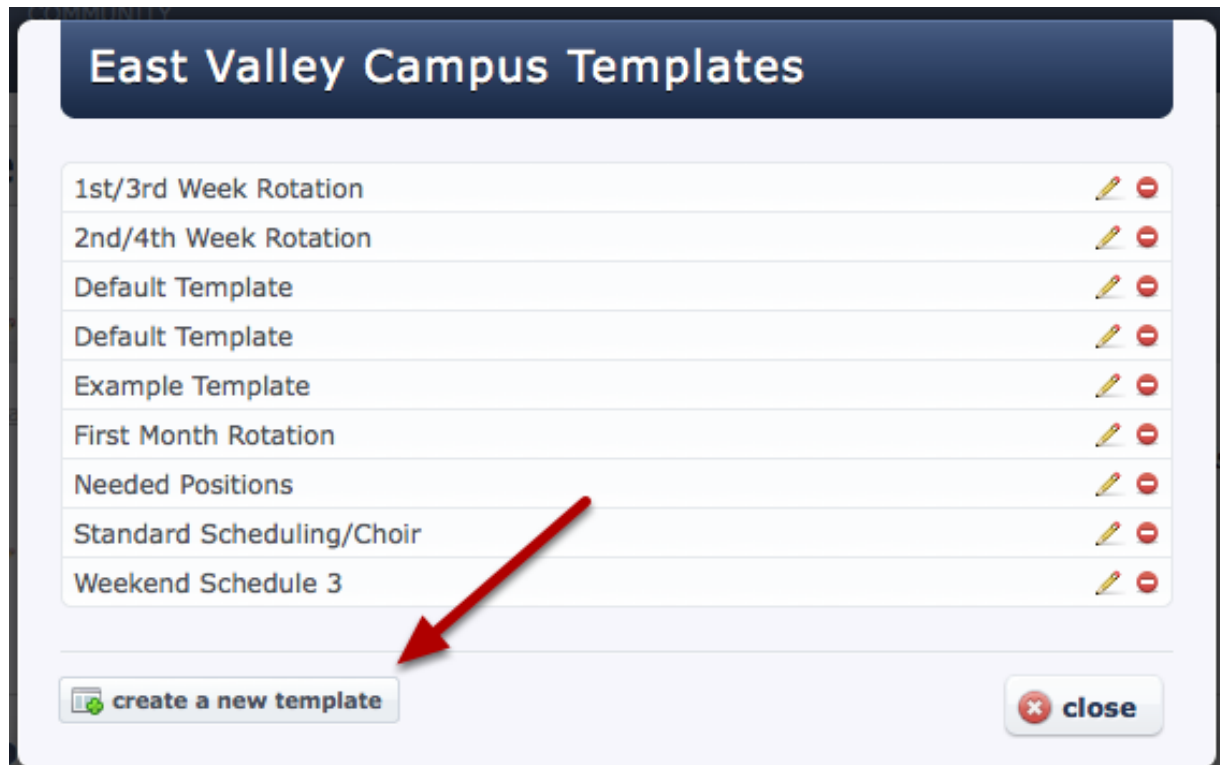
Creating A Template and Applying it to a Plan

Click on 'Templates'

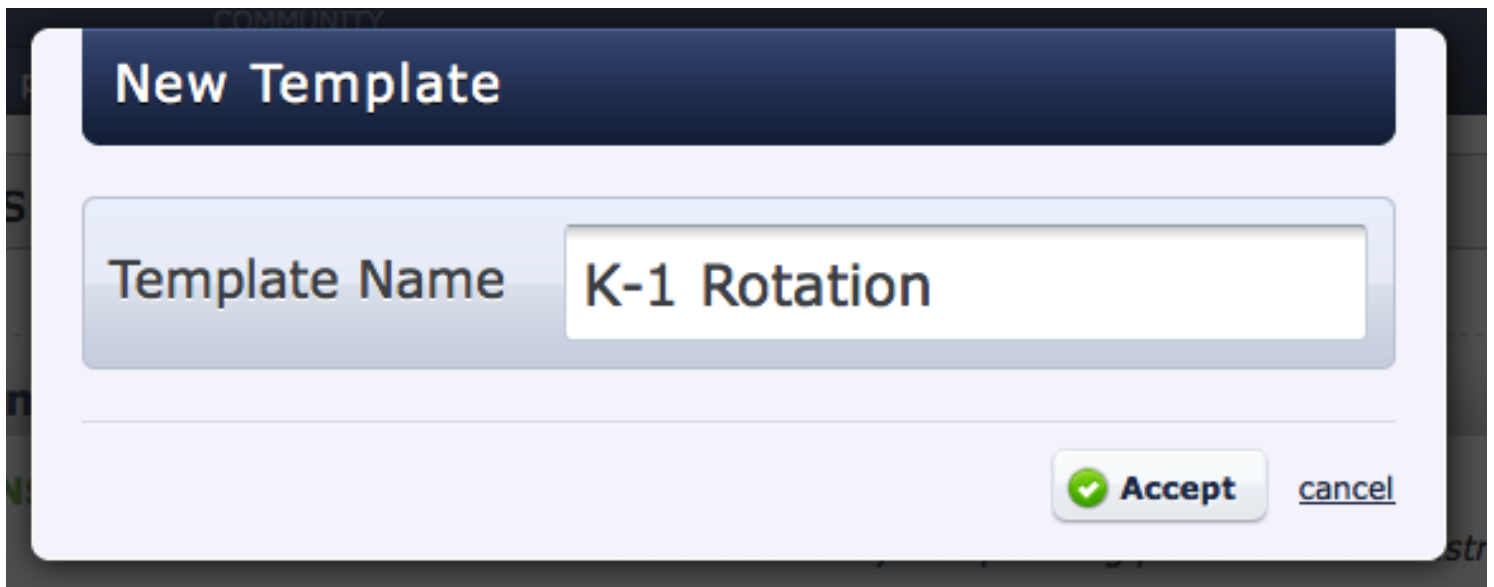


Note: Only Administrators have access to the Properties page.

Click on 'create a new template'



Enter the name of the template



New Template

Template Name

Add to your template



People

Notes

La Quinta/Main Campus

K-1 Rotation

Length in mins **Vocals Notes**

Here are things you can add to your template:

1. Add Notes.
2. Needed Positions. This is very helpful 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'.

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE	PLAN TITLE	
No dates		18 days ago
November 3, 2010	Phillipplans Finding Joy	iPhone Tester 6 days ago

ATTACHMENTS

[+](#) create a new plan [↶](#) matrix [↶](#) reports [👉](#) properties

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.

COMMUNITY

Create A New Plan

Template [Manage Your Templates](#) Quantity: 1

- ✓ Default Template
- Standard Scheduling
- No Template

[cancel](#)

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

East Valley Campus

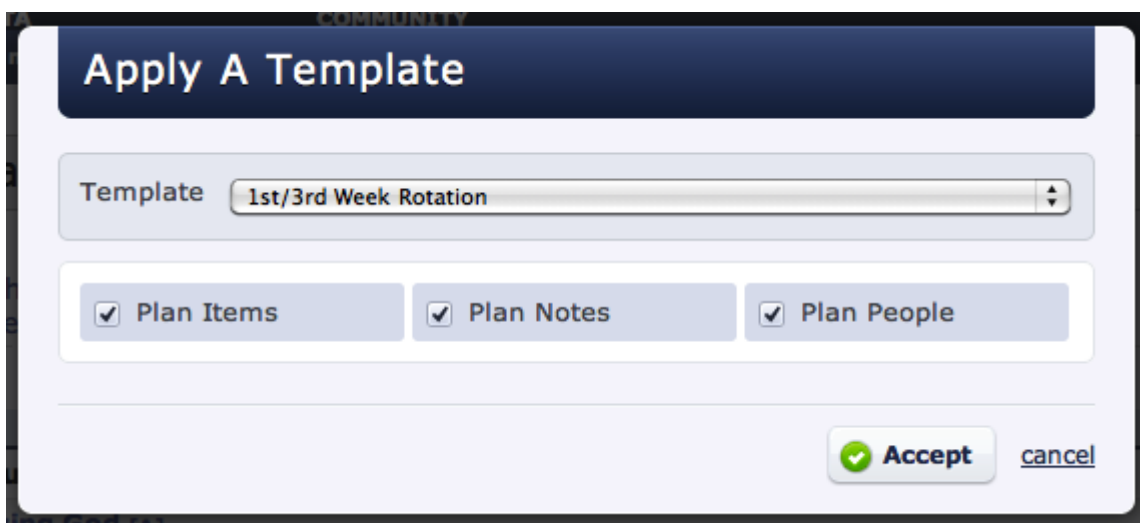
UPCOMING PLANS [view all plans](#)

SERIES TITLE
October 1, 2010
October 8, 2010
October 15, 2010
October 22, 2010
October 29, 2010
November 5, 2010
November 12, 2010

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'

PLAN TITLE

about

about

 [create a new plan](#)  [matrix](#)  [reports](#)  [templates](#)


Note: only administrators have access to the Template link.

To edit, click on the pencil icon for that template

La Quinta/Main Campus Templates

1st and 3rd Week	 
1st Week La Quinta	 
2nd and 4th Week	 
Demo Template	 
K-1 Rotation	 
Needed Positions	 
Standard Scheduling	 

 [create a new template](#)

 [close](#)

Edit your Template

The screenshot shows the 'Edit your Template' interface for a template named 'First Impressions'. The interface is divided into two main sections: 'People' on the left and the template details on the right. The 'People' section includes a 'Band' section with a 'schedule a person' button (3) and a 'needed positions' section. The 'Notes' section has an 'add a note' button (5). The template details section shows the current name 'Sunday Morning Template' (2), an 'add an item' button (1), and a 'Length' section with a 'Test Test Test' item (4). Below the 'Length' section is a 'Welcome' section with a 'Third Testing Item' and an 'add an item' button. Red arrows point from numbered circles (1-5) to the corresponding buttons and elements.

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 "-".


The screenshot shows a list of templates under the heading 'La Quinta/Main Campus Templates'. The list includes: '1st and 3rd Week', '1st Week La Quinta', '2nd and 4th Week', 'Demo Template', 'K-1 Rotation', 'Needed Positions', and 'Standard Scheduling'. Each item has an edit icon (pencil) and a delete icon (red minus sign). A red arrow points to the delete icon for 'Standard Scheduling'. At the bottom, there is a 'create a new template' button and a 'close' button.

Deleting a Plan

To delete a plan, hover over the plan date.

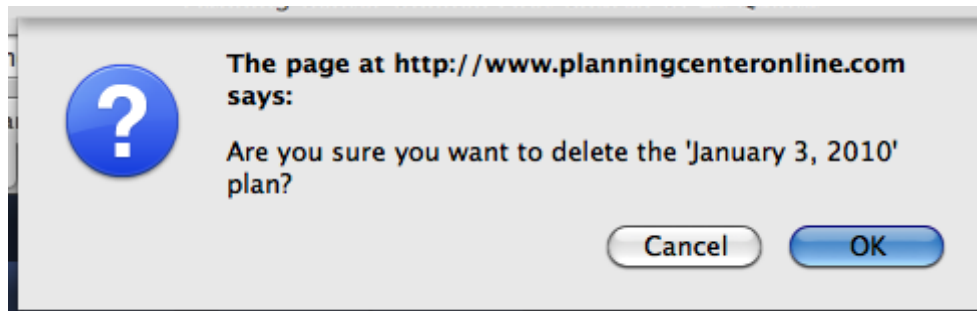
Sunday Worship Services

Contemporary Service

	UPCOMING PLANS	SERIES TITLE	PLAN TITLE
	January 3, 2010		
	January 10, 2010		
	January 17, 2010		
	January 24, 2010		
	January 31, 2010		

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

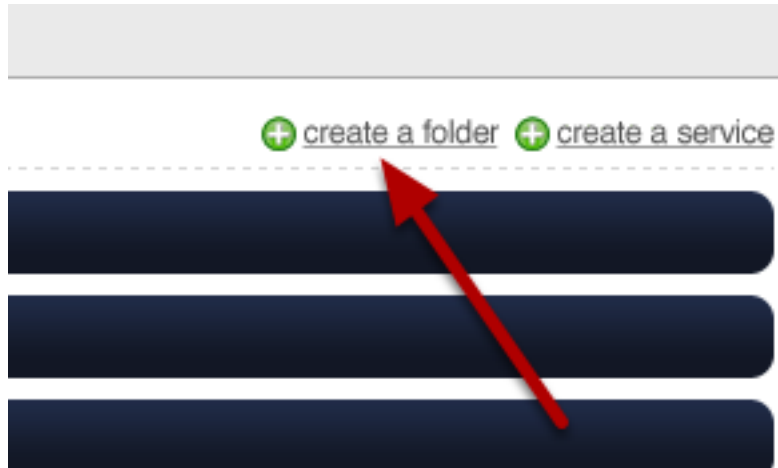
Click 'OK' to finalize deletion.



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.

A screenshot of a 'New Folder' dialog box. The title bar says 'New Folder'. Below the title bar, there is a text input field labeled 'Folder Name' containing the text 'Children's'. A red arrow points to the text in the input field. Below the input field, there is a text label 'Load the matrix with' followed by a dropdown menu showing '0', then the word 'previous' and another dropdown menu showing '1', followed by the text 'next plans from each service type in this folder.'. At the bottom right of the dialog box, there are two buttons: 'Accept' with a green checkmark icon and 'cancel'.

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'.

First Church Of La Quinta

-  **Children's**
 -  **Other Productions**
 -  **Student Ministries**
 -  **Weekend Worship Services**
- 

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

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

[March 31, 2011](#)

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)

[April 28, 2011](#)

[May 5, 2011](#)

[May 12, 2011](#)

[May 19, 2011](#)

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

Edit Service

Service Title

Folder

Frequency

Attachment types

Comment permissions

Load the matrix with previous and next plans.



Accept

[cancel](#)

Deleting Folders

For folders with no services in them:

First Church of the Nazarenes

 **Adult Ministries**

 **Children's Ministry**

UPCOMING PLANS

SERIES TITLE

PLAN TITLE

No dates

No dates

ATTACHMENTS

 **First Impressions**

UPCOMING PLANS

SERIES TITLE

PLAN TITLE

October 17, 2000

Click on the name of the folder

Click the link to delete your empty folder

plans


songs

media

people

songs

media

 **Adult Ministries** 

The current group Adult Ministries is empty. You can either delete it or add a new ministry.

For folders that have services in them:

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)

[April 28, 2011](#)


[May 5, 2011](#)

[May 12, 2011](#)

[May 19, 2011](#)

[May 26, 2011](#)

ATTACHMENTS

 [Datatabase Backup.zip](#)

 [Add an attachment](#)

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

Edit Service Type

Service Title

Folder	Frequency	Attachment types	Comment permissions
<input type="text" value="Weekend Worship Ser"/>	<input type="text" value="Weekly"/>	<input type="text" value="Enabled"/>	<input type="text" value="Scheduled Viewer"/>

Load the matrix with previous and next plans.


[Delete this service type](#)

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.

Adult Ministries

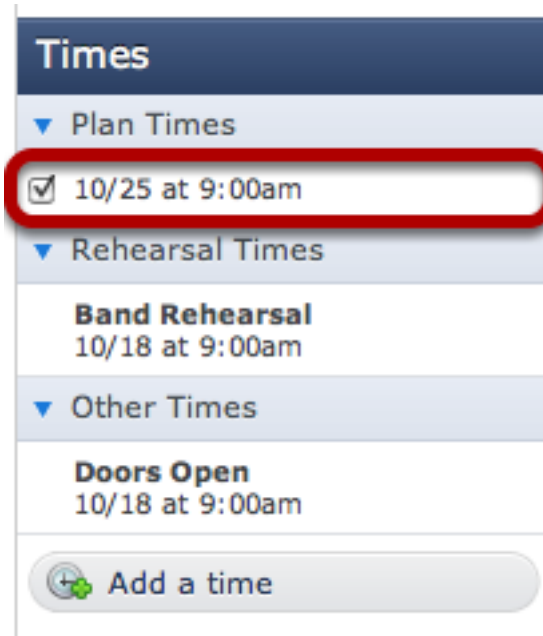
The current group Adult Ministries is empty. You can either delete it or add a new ministry.



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.

Editing Time

1 Date:  Time: to

2 Type: Name:

4 **Assigned People Categories** Check All Uncheck All

<input checked="" type="checkbox"/> Vocals	5 <input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Band	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Audio/Visual	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Video	<input type="text" value="No Reminder"/>
<input checked="" type="checkbox"/> Welcome Team	<input type="text" value="No Reminder"/>

6 Update This Time In Future Plans

[cancel](#)

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.

Contemporary Service

UPCOMING PLANS

[November 1, 2009](#)

[November 8, 2009](#)

[November 15, 2009](#)

SERIES TITLE

PLAN TITLE

Katie Willard
about 1 hour ago

Katie Willard
about 1 hour ago

Katie Willard
about 1 hour ago

ATTACHMENTS

[+ create a new plan](#) [matrix](#) [archives](#) [reports](#) [properties](#)
[+ link to an attachment](#) [+ upload an attachment](#)

Indicate specifics

Create A New Plan

Template **1** [Manage Your Templates](#) Quantity: **2**
1st/3rd Week Rotation 1

[Change the dates for this new plan](#) **3**

[cancel](#)

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!

The screenshot shows a web interface for planning at 'La Quinta/Main Campus'. The left sidebar contains sections for 'Times', 'People', 'Notes', and 'Attachments'. The main area displays a date 'May 12, 2011' and a message 'No series times set - click here to change'. A table shows a time slot for '5/12' at '9:00a' with a length of '0' minutes. Three red arrows point to specific features: arrow 1 points to the 'Add a time' button in the Times section; arrow 2 points to the 'Schedule a person' button in the People section; arrow 3 points to the 'add an item' button in the main area.

5/12	Length
9:00a	in mins
9:00	0

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).

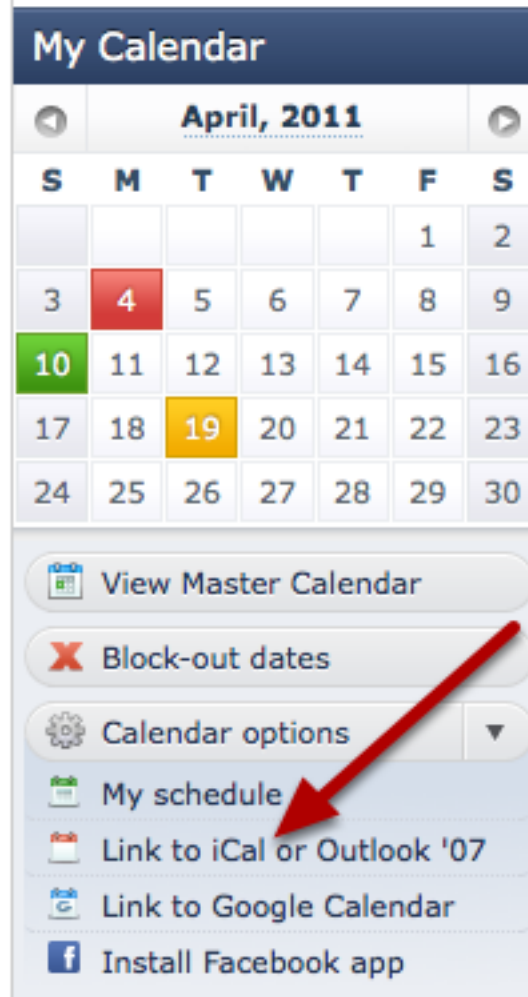
2- Schedule A Person.

3- Add an Item, Header, Song, or Media (hold your mouse over add an item to get these other options).

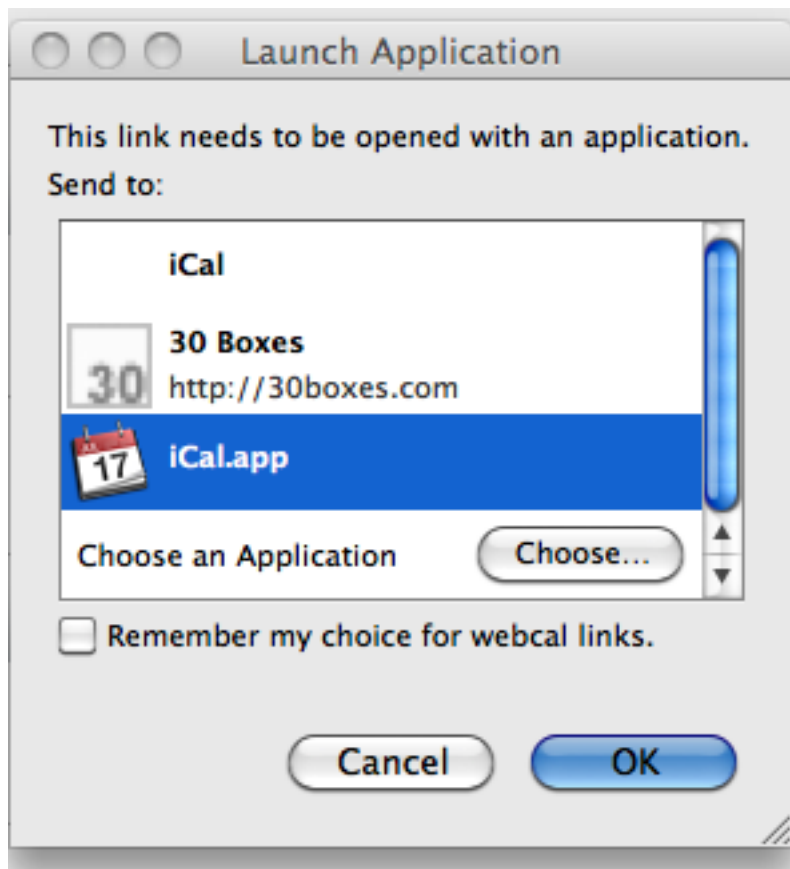
How to Link with iCal or Outlook 2007

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

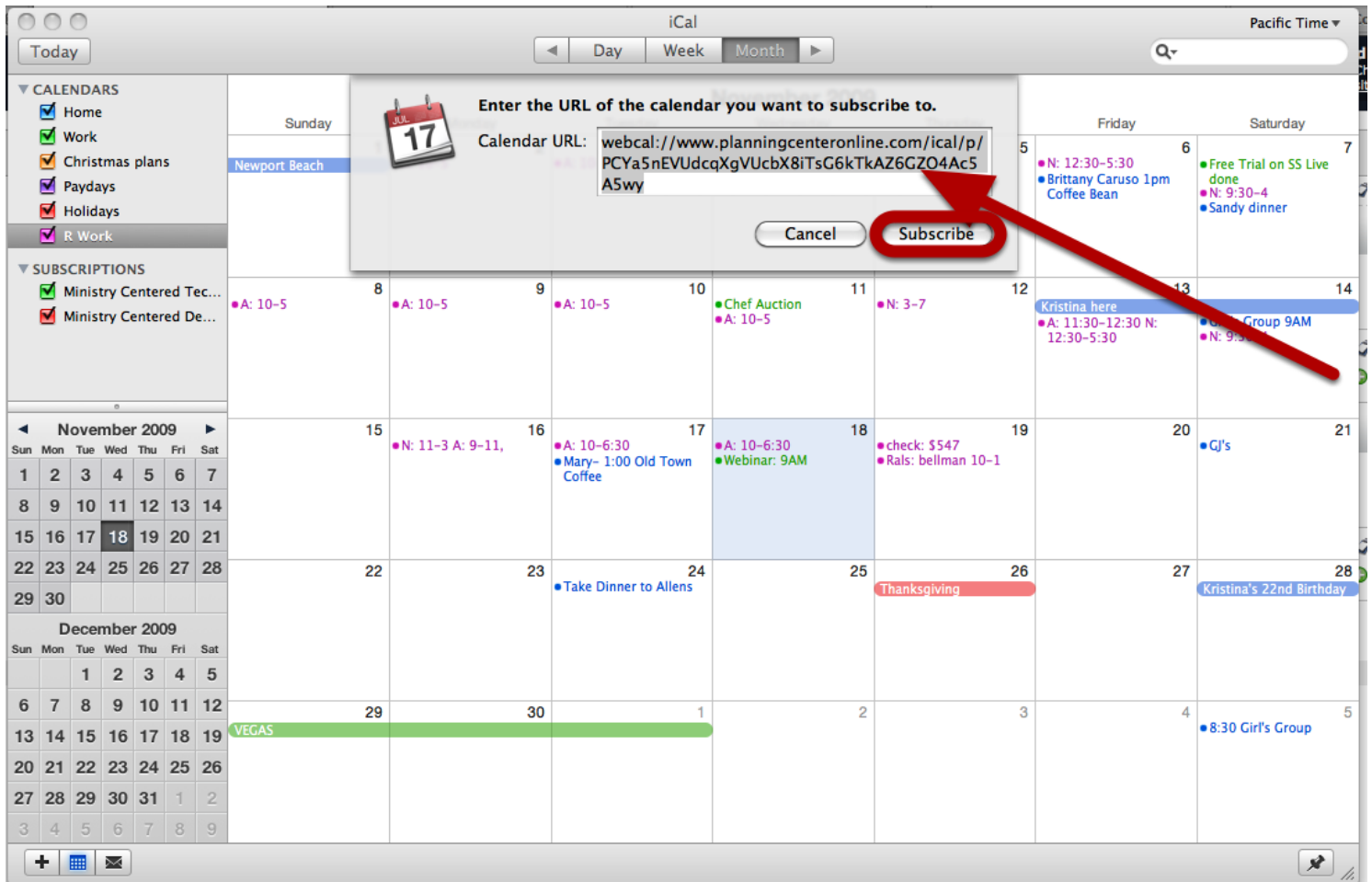


iCal Syncing:



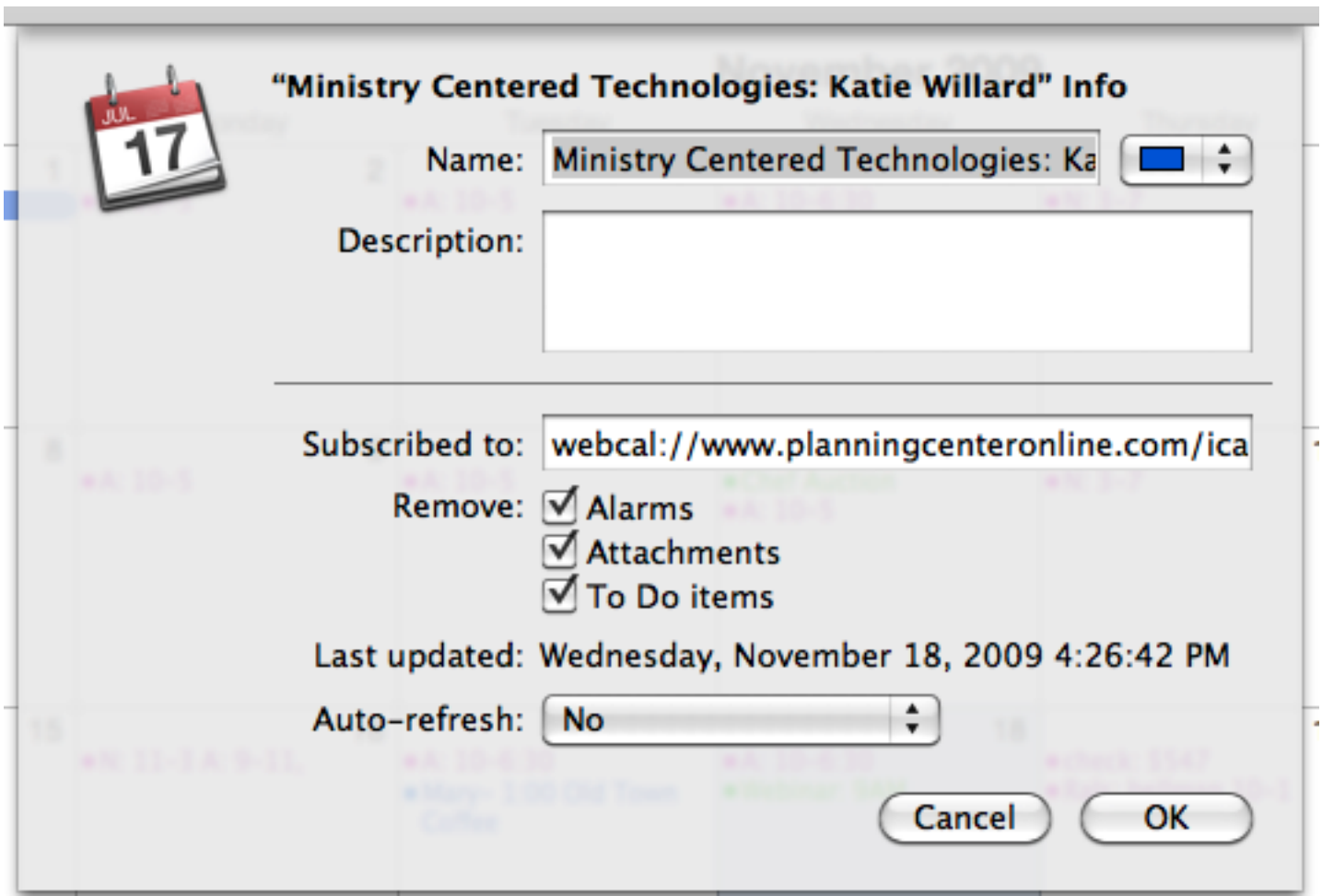
It will automatically bring up the iCal app (if you have this installed on your computer). Just click OK.

Select URL, click subscribe.



Leave the URL how it is and click Subscribe.

Indicate Options

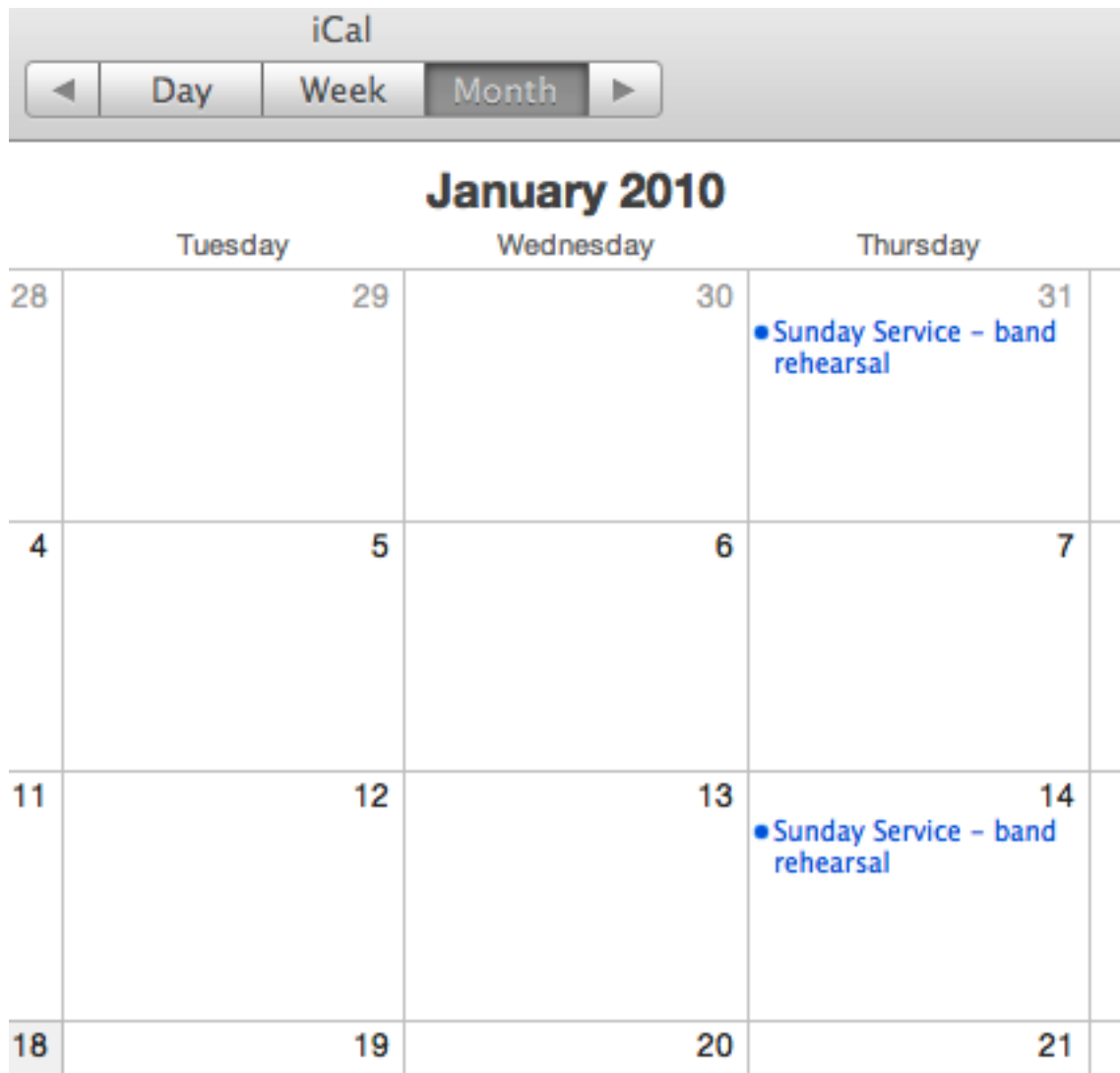


The screenshot shows a calendar application window with a dialog box titled "Ministry Centered Technologies: Katie Willard" Info. The dialog box contains the following fields and options:

- Name:** Ministry Centered Technologies: Ka (with a color selection button and a dropdown arrow)
- Description:** (empty text box)
- Subscribed to:** webcal://www.planningcenteronline.com/ica
- Remove:** Alarms, Attachments, To Do items
- Last updated:** Wednesday, November 18, 2009 4:26:42 PM
- Auto-refresh:** No (with a dropdown arrow)
- Buttons:** Cancel and OK

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

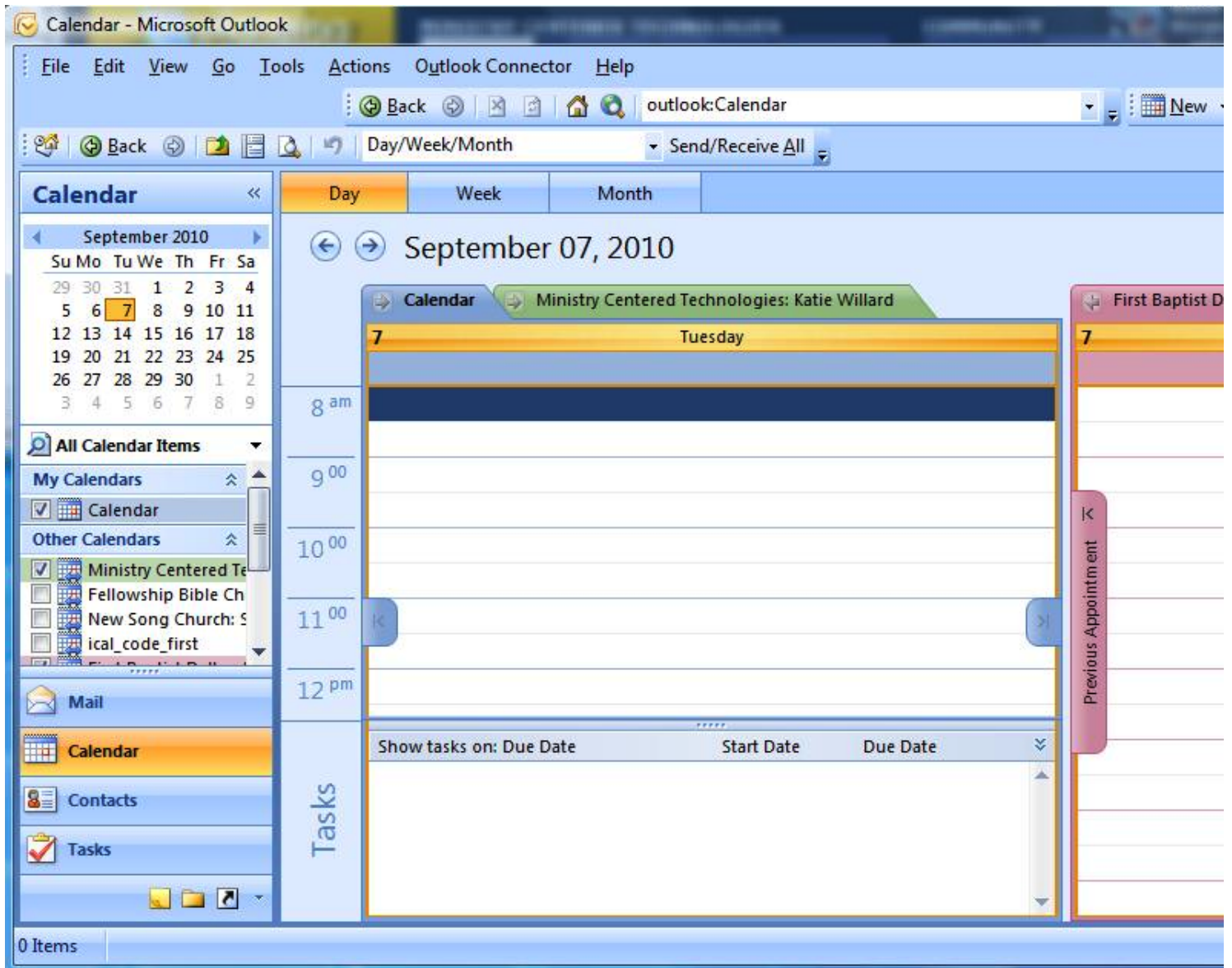
My Calendar

◀ April, 2011 ▶

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

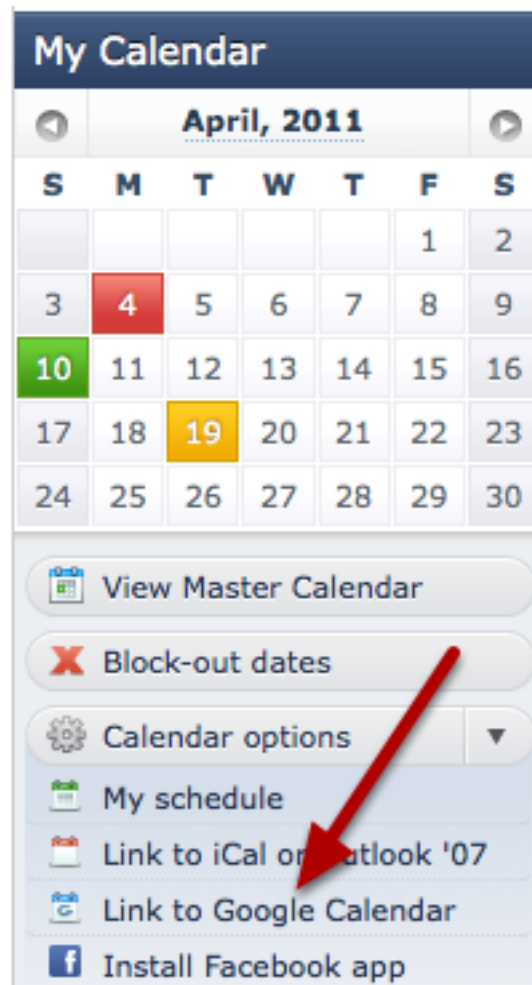
-  View Master Calendar
-  Block-out dates
-  Calendar options ▾
-  My schedule
-  [Link to iCal or Outlook '07](#)
-  [Link to Google Calendar](#)
-  [Install Facebook app](#)

Your account will automatically be linked with your Outlook calendar.

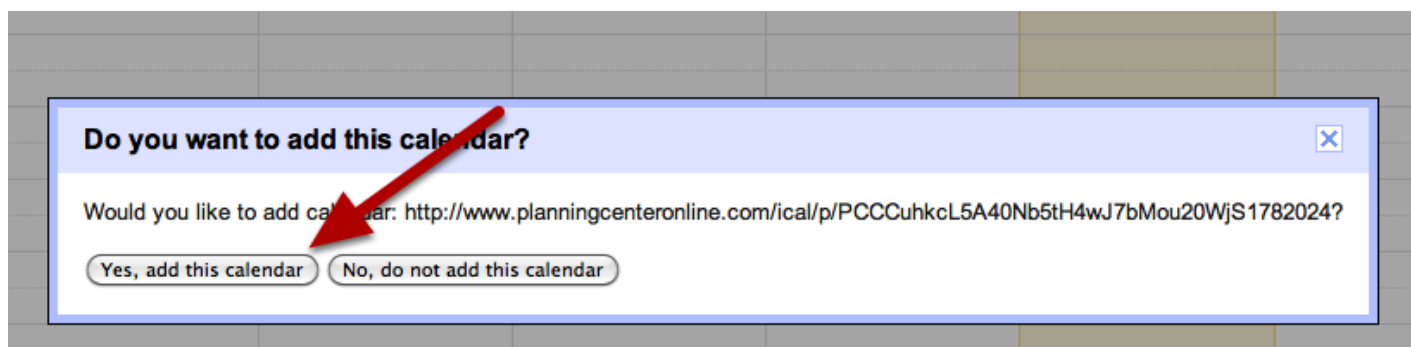


How to Link with Google Calendar

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     <i>track number 5 on CD</i> <i>Sarah sings the solo</i>
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 <i>track number 5 on CD</i> <i>Sarah sings the solo</i>
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.

The screenshot shows a church planning interface for 'La Quinta/Main Campus' on May 19, 2011. The 'Times' sidebar on the left has two checked times: 'Traditional Service 5/19 at 9:00am' and '5/19 at 11:00am'. The 'People' sidebar lists instrument assignments for various roles. The main service plan table shows items for two times: 9:00a and 11:00a. Red arrows and callouts highlight the 'Add a time' button and the two time slots in the plan table.

5/19	5/19	Length	
9:00a	11:00a	in mins	
Pre-Service			
8:50a	10:50a	10	Prelude <i>Piano Hymms by Debbie</i>
Worship Set			
9:00a	11:00a	3:45	Amazing God [D]
9:03.45a	11:03.45a	1:30	Prayer by Pastor Mike <i>Band continues to play.</i>
9:05.15a	11:05.15a	4	Indescribable
9:09.15a	11:09.15a	3:30	The Wonderful Cross
Message			
9:12.45a	11:12.45a	5:30	Announcements <i>Youth Camp coming up- need donations Church Potluck next week immediately after service</i>
9:18.15a	11:18.15a	1:20	Intro Video
9:19.35a	11:19.35a	40	Message by Pastor Carl <i>blue mic</i>
Closing			
9:59.35a	11:59.35a	0	All Hail The Power Of Jesus' Name [Db]
9:59.35a	11:59.35a	0	Better Is One Day [D]

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.

Main Auditorium

December 19, 2009 

Philippians

Finding Joy


12/19	12/19	Length	
9:00a	11:00a	in mins	





Pre-Service

8:50a	10:50a	10	 Prelude
-------	--------	----	--

Worship Set


9:00a	11:00a	4	 Cannons
-------	--------	---	--

9:04a	11:04a	3:45	 Amazing God [D]
-------	--------	------	--

9:07.45a	<u>11:07.45a</u>	1:30	 Prayer by Pastor Mike    <i>Band continues to play.</i>
----------	------------------	------	--

9:09.15a	11:09.15a	3:30	 The Wonderful Cross
----------	-----------	------	--

9:12.45a	11:12.45a	3	 All Creatures Of Our God And King
----------	-----------	---	--

9:15.45a	11:15.45a	4	 Indescribable
----------	-----------	---	--

Message

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.

Main Auditorium			
December 19, 2009 +			
Philippians			
Finding Joy			
12/19	12/19	Length	
9:00a	11:00a	in mins	
Pre-Service			
8:50a	10:50a	10	Prelude
Worship Set			
9:00a	11:00a	4	Cannons
9:04a	11:04a	3:45	Amazing God [D]
9:07.45a		1:30	Prayer by Pastor Mike <i>Band continues to play.</i>
9:09.15a	11:07.45a	3:30	The Wonderful Cross
9:12.45a	11:11.15a	3	All Creatures Of Our God And King
9:15.45a	11:14.15a	4	Indescribable
Message			

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'.

Main Auditorium

December 19, 2009 +
Philippians
Finding Joy

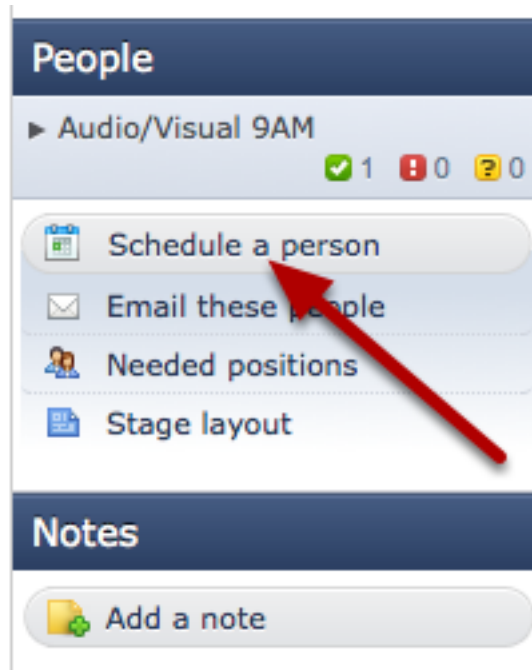
12/19 9:00a	12/19 11:00a	Length in mins	
Pre-Service			
8:50a	10:50a	10	Prelude
Worship Set			
9:00a	11:00a	4	Cannons
9:04a	11:04a	3:45	Amazing God [D]
9:07.45a	add	1:30	Prayer by Pastor Mike <i>Band continues to play.</i>
9:09.15a	11:07.45a	3:30	The Wonderful Cross
9:12.45a	11:11.15a	3	All Creatures Of Our God And King
9:15.45a	11:14.15a	4	Indescribable
Message			

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

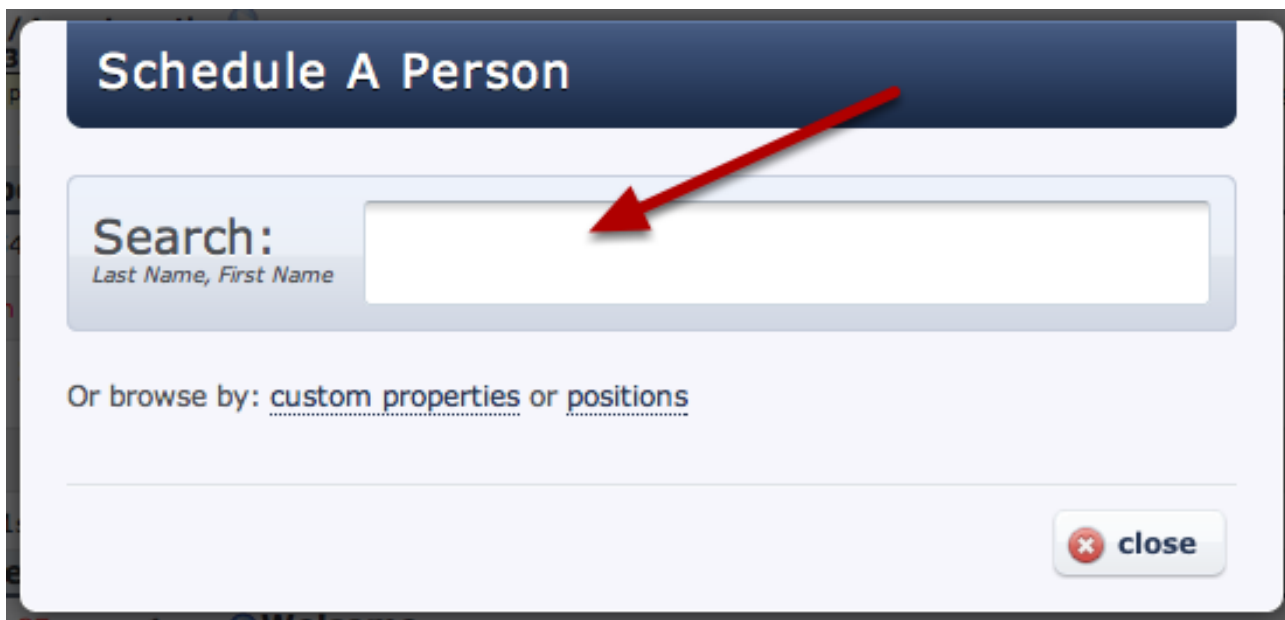
This lesson will teach you how to schedule individual people from any plan page.

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

Schedule A Person

Search:
Last Name, First Name

Or Browse: [Click here](#)

Search results for "jef":

- Berg, Jeff (#579841)
- Berg, Jeff (#829195)
- Spill, Jeff (#320958)
- Create A New Person

Cancel

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)

Editing Scheduled Person

Aaron Stewart

Confirmed Unconfirmed Declined

Category: Band Position: Keys

Replies To: Drew Bodine

Prepare Notification: Check to prepare notifications

Notes:

Service Times: Service

Rehearsal Times: Wed Band & Prod Call, Vocal Call, Speaker Mic Check, Team Prayer

Other Times: Doors Open

After you have scheduled this person and sent the notification you can come back to this dialog and find out when the notification was read and responded to.

Accept cancel

1. **Status:** 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 their 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



Schedule A Person

 You have successfully added Aaron Stewart to this plan.

Search:

Last Name, First Name

Or browse by: [custom properties](#) or [positions](#)

 **close**

Once 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.

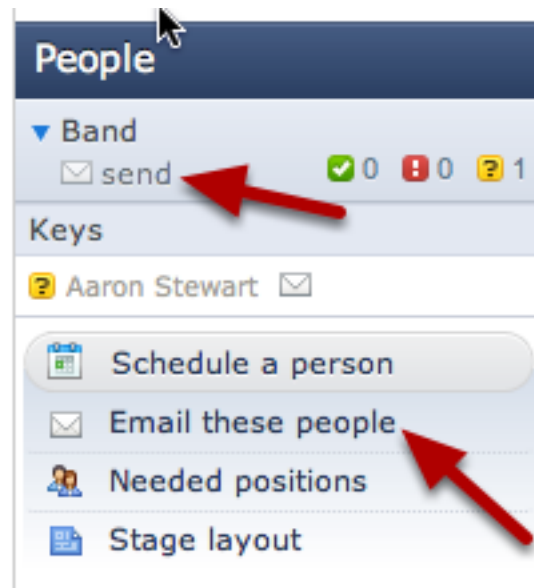
Once all of your people are scheduled, make sure you [send them their notification emails](#). If you don't, they won't know they have been scheduled and won't be able to access the plan (unless they have a high enough permission).

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

Prepare An E-mail

Send E-mails for: 1

Prepared Notifications All Scheduled People

With Status: 2

Unconfirmed Confirmed Declined

In Categories: 3

Audio/Visual 9AM Choir Instruments Played

Vocals

[cancel](#)

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

E-Mail These People

With E-Mails

Aaron Stewart

 You are about to e-mail the 1 person you have currently selected.

Subject:

Hi FIRST_NAME-

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

Thanks,

Aaron Stewart
Ministry Centered Technologies

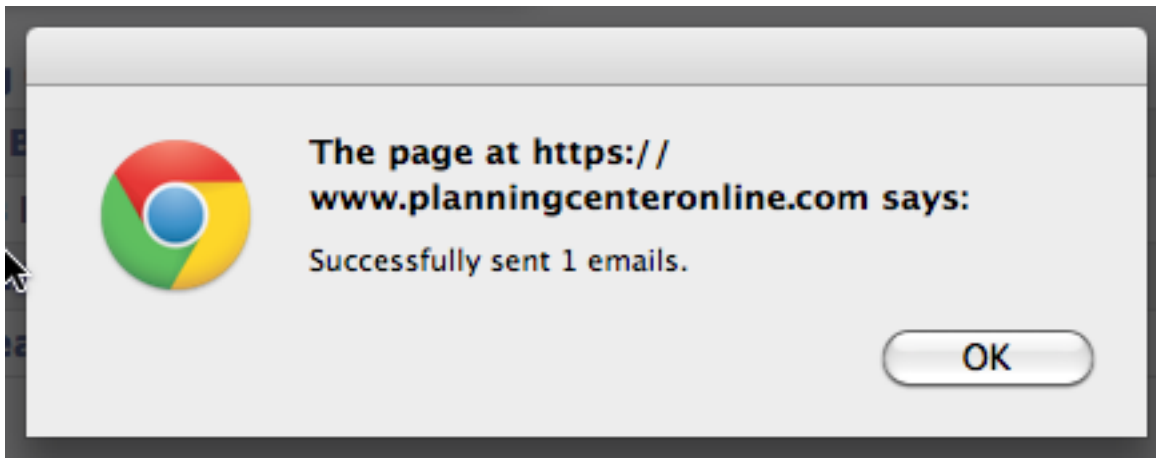
[cancel](#)

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".

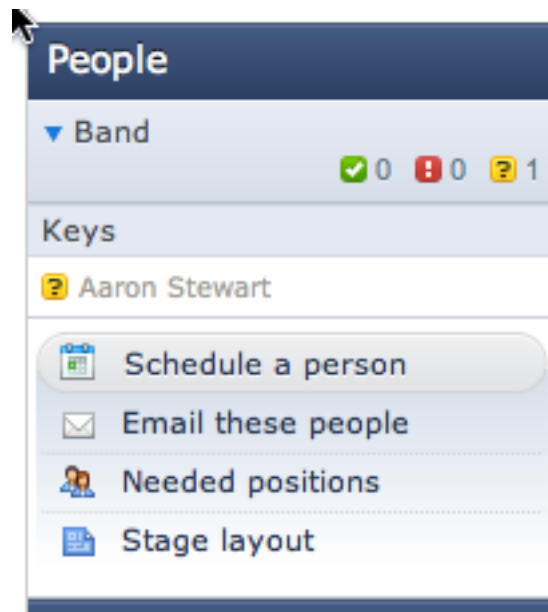
Click Accept to send the email

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.


Category [add a category](#) **Position**

Band Keys

Replies To: **Prepare Notification:**

Aaron Stewart Check to prepare notifications

Notes:

 **Sent:** 5/18 at 12:46pm
Read: 5/18 at 12:49pm
Confirmed: 5/18 at 12:49pm


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:

Editing Scheduled Person



Reagan Helms

Confirmed Unconfirmed Declined

Warning, there are scheduling conflicts: [hide conflicts](#)
To ignore the conflicts and schedule anyway, press accept, otherwise click cancel.

Blocked Out 11/3/2010 to 11/3/2010: This conflicts with **rehearsal & plan times** for this plan.

Category [add a category](#) Position

Audio/Visual 11AM

Responds To: Reagan Helms Prepare Notification: Check to prepare notifications

Notes:

Service Times

Traditional Service

Traditional Service 2

Rehearsal Times

Worship Team Practice

Other Times


Call Time

Accept [cancel](#)

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:

Editing Scheduled Person



Reagan Helms

Confirmed Unconfirmed Declined

Warning, there are scheduling conflicts: [hide conflicts](#)
To ignore the conflicts and schedule anyway, press accept, otherwise click cancel.

East Valley Campus on November 3, 2010 conflicts with **rehearsal & plan times** for this plan as

Category [add a category](#) Position

Audio/Visual 11AM

Responds To: Reagan Helms Prepare Notification: Check to prepare notifications

Notes:

Service Times

Traditional Service

Traditional Service 2

Rehearsal Times

Worship Team Practice

Other Times

Call Time

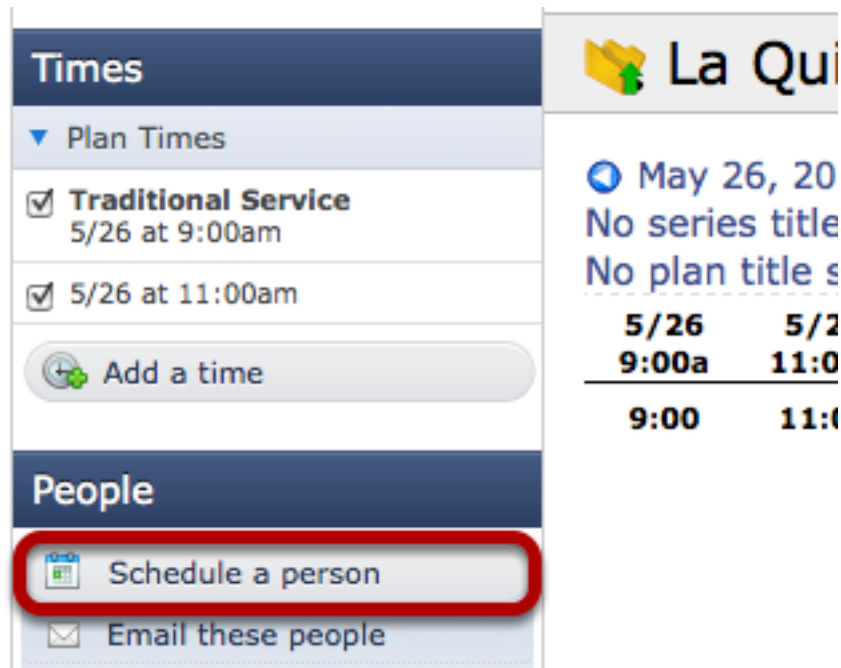
Accept [cancel](#)

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

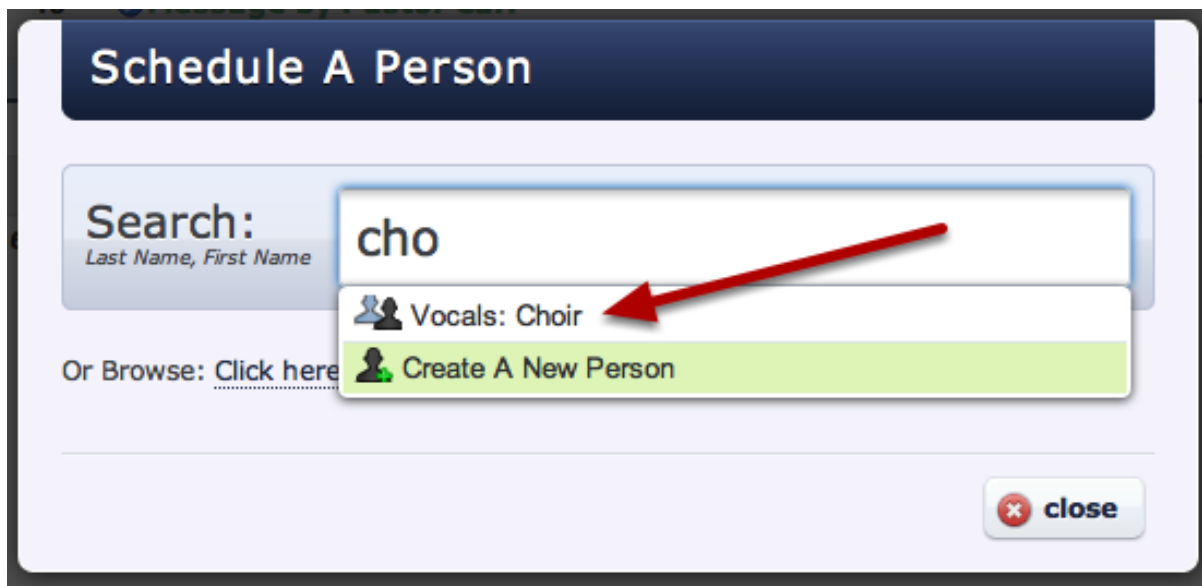
This lesson shows you how to schedule a whole group or team of people at one time, without having to enter in each individual name. If you haven't created your groups or teams, see [Creating groups or teams for Scheduling](#).

Inside your plan, click 'Schedule A Person'.



The screenshot shows a scheduling interface with two main sections: 'Times' and 'People'. The 'Times' section includes a dropdown for 'Plan Times', a list of scheduled times (e.g., 'Traditional Service 5/26 at 9:00am'), and an 'Add a time' button. The 'People' section contains a red-bordered button labeled 'Schedule a person' and an 'Email these people' button. To the right, a calendar view shows a date 'May 26, 20' and a table of times: 5/26 9:00a and 5/26 11:00a.

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



The screenshot shows a dialog box titled 'Schedule A Person'. It has a search field with the text 'cho' and a dropdown menu below it. The dropdown menu has two options: 'Vocals: Choir' (which is highlighted with a red arrow) and 'Create A New Person'. There is also a 'close' button in the bottom right corner.

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.

Browse People

Instruments Played Vocals Tech
Leaders Hospitality Campuses

NAMES 1 TO 10		LAST USED
Aaron Stewart	3 conflicts	March 17, 2011
Aubrey Wentz	1 conflict	March 10, 2011
Dave Petrie	1 conflict	March 10, 2011
Hannah Berg	2 conflicts	March 17, 2011
Jason Beddall	1 conflict	March 10, 2011
Jason Berg	1 conflict	March 10, 2011
Jeff Spill	2 conflicts	March 17, 2011
Jordan Smith	1 conflict	March 17, 2011
Karen Willard		March 17, 2011
Katharine Jones		March 10, 2011

◀ prev [next](#) ▶ [cancel](#)

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

The screenshot shows the 'Schedule Group' interface. On the left, a list of 11 people is shown with conflict and block-out counts: Aaron Stewart (3 conflicts, 1 block-out), Aubrey Wentz, Dave Petrie, Hannah Berg (3 conflicts), Jason Beddall, Jason Berg, Jeff Spill (2 conflicts), Jordan Smith (1 conflict), Karen Willard (1 conflict), Katharine Jones, and Tester Scheduler (1 conflict). A button labeled '1' points to the 'Schedule each person to a separate position' option. Below this is an 'OR' separator and a section titled 'Schedule them all to the following position:'. This section contains fields for Category (Audio/Visual), Position (empty), Status (Unconfirmed), Responds To (Dave Petrie), and a checked 'Prepare Notification' checkbox. A button labeled '2' points to the Position field. At the bottom, a button labeled '3' points to the 'Remove 6 people with conflicts' button. A red arrow points from the 'Prepare Notification' checkbox to the 'Accept' button.

11 people to schedule

Aaron Stewart	3	1
Aubrey Wentz		
Dave Petrie		
Hannah Berg	3	
Jason Beddall		
Jason Berg		
Jeff Spill	2	
Jordan Smith	1	
Karen Willard	1	
Katharine Jones		
Tester Scheduler	1	

1 Schedule each person to a separate position

OR

Schedule them all to the following position:

Category: Audio/Visual

Position: **2**

Status: Unconfirmed

Responds To: Dave Petrie

Prepare Notification:

3 Remove 6 people with conflicts Remove 1 person with block-outs

Accept [cancel](#)

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.

Schedule Group

11 people to schedule Schedule To Same Position

Aaron Stewart	3 1	Choir	Choir	Aaron Stewart	Confirmed
Aubrey Wentz		Choir	Choir	Aaron Stewart	Confirmed
Dave Petrie		Choir	Choir	Aaron Stewart	Confirmed
Hannah Berg	3	Audio/Visual 9	Camera	Reagan Helms	Unconfirmed
Jason Beddall		Choir	Choir	Aaron Stewart	Confirmed
Jason Berg		Choir	Choir	Aaron Stewart	Confirmed
Jeff Spill	2	Instruments Pl:	Drums	Aaron Stewart	Unconfirmed
Jordan Smith	1	Audio/Visual 9		Reagan Helms	Unconfirmed
Karen Willard	1	Vocals	Choir	Aaron Stewart	Confirmed
Katharine Jones		Choir	Choir	Aaron Stewart	Confirmed
Tester Scheduler	1	Vocals	Choir	Aaron Stewart	Confirmed

Remove 6 people with conflicts Remove 1 person with block-outs [cancel](#)

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.

People		
▶ Audio/Visual 9AM	send	✓ 0 ! 0 ? 3
▶ Choir	send	✓ 9 ! 0 ? 0
▶ Instruments Played	send	✓ 0 ! 0 ? 7
▶ Tech 11AM	send	✓ 1 ! 1 ? 1
▼ Vocals	send	✓ 5 ! 0 ? 0
Alto		
✓ Shannon Berg	✉	
Bass		
2 more people needed		
Choir		
✓ Jeff Spill	✉	
✓ Karen Willard		
✓ Tester Scheduler	✉	
1 more person needed		
Worship Leader		
✓ Aaron Stewart	✉	
Schedule a person		
✉ Email these people		
Needed positions		

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.

Contemporary Service

UPCOMING PLANS

[November 22, 2009](#)

[December 13, 2009](#)

SERIES TITLE

PLAN TI

ATTACHMENTS

Main Auditorium

UPCOMING PLANS

[December 13, 2009](#)

SERIES TITLE

Phillipians

PLAN TI

Finding Ji

ATTACHMENTS

[Ephesians 7 audio.mp3](#) [updates for pco page.docx](#)

Traditional Service

UPCOMING PLANS

[November 22, 2009](#)

SERIES TITLE

PLAN TI

Click on a date/time.


Times

▼ Plan Times

- Traditional Service**
5/5 at 9:00am
- Traditional Service 2**
5/5 at 11:00am

▼ Rehearsal Times

Worship Team Practice
4/26 at 7:00pm

 Add a time

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

Set reminders for each category.

The screenshot shows the 'Editing Time' interface. At the top, there's a dark blue header with the text 'Editing Time'. Below this, there are several input fields: 'Date:' with a calendar icon and the value '5/5/2011'; 'Time:' with the value '9:00am' and 'to 10:03am'; 'Type:' with a dropdown menu showing 'Plan Time'; and 'Name:' with the text 'Traditional Service'. Below these fields is a section titled 'Assigned People Categories' with two buttons: 'Check All' (with a green checkmark) and 'Uncheck All'. A red arrow points to the 'Uncheck All' button. Underneath, there is a list of categories with checkboxes and reminder settings:

Category	Reminder
<input type="checkbox"/> Audio/Visual 11AM	No Reminder
<input checked="" type="checkbox"/> Audio/Visual 9AM	No Reminder
<input checked="" type="checkbox"/> Band 11AM	No Reminder
<input checked="" type="checkbox"/> Choir	No Reminder
<input checked="" type="checkbox"/> Hospitality	No Reminder
<input checked="" type="checkbox"/> Instruments Played	No Reminder
<input checked="" type="checkbox"/> TEAMS	No Reminder
<input checked="" type="checkbox"/> Tech 9AM	No Reminder
<input checked="" type="checkbox"/> Tech 11AM	6 days before
<input checked="" type="checkbox"/> Vocals	6 days before

At the bottom of this section, there is a checkbox labeled 'Update This Time In Future Plans'. At the very bottom of the interface, there are two buttons: 'Accept' (with a green checkmark) and 'cancel'.

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

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

March 31, 2011

April 7, 2011

April 14, 2011

April 21, 2011

April 28, 2011

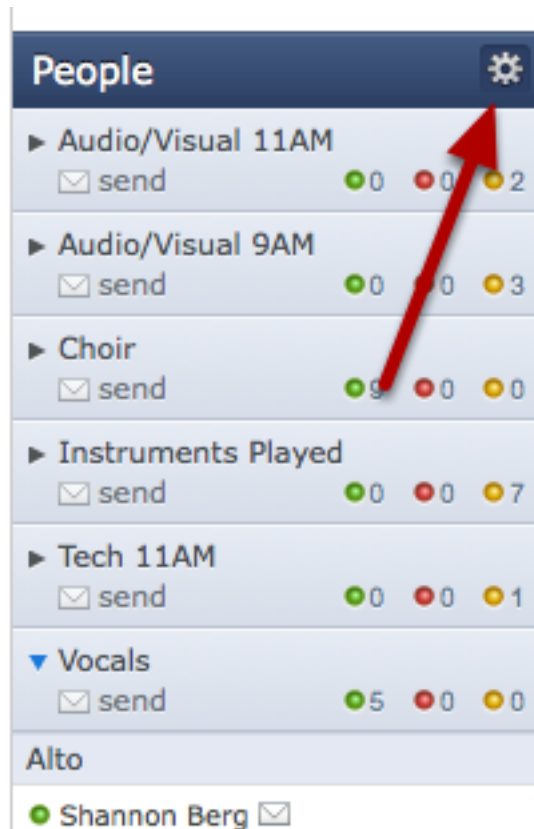
May 5, 2011

May 12, 2011

May 19, 2011

May 26, 2011

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.



The screenshot shows the 'Edit Category' dialog box. At the top, the title 'Edit Category' is in a dark blue header. Below it, the 'Name' field contains 'Audio/Visual' (callout 1). A green button labeled 'Assign Using Custom Properties' (callout 2) is selected, with 'Assign People Directly' being unselected. The 'Default Scheduling Options' section includes a 'Status' dropdown set to 'Unknown' (callout 3), 'Send Replies For' checkboxes for 'Accept' and 'Decline' (callout 4), and a 'Send Replies To' search field (callout 5). The 'Scheduled Viewers See' dropdown is set to 'Full Plan' (callout 6), and the 'Prepare Notification' checkbox is checked (callout 7). The 'Stage Layout Options' section has a 'Stage Icon' dropdown set to 'Orange' (callout 8). At the bottom right, there are 'Accept' and 'cancel' buttons.

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.

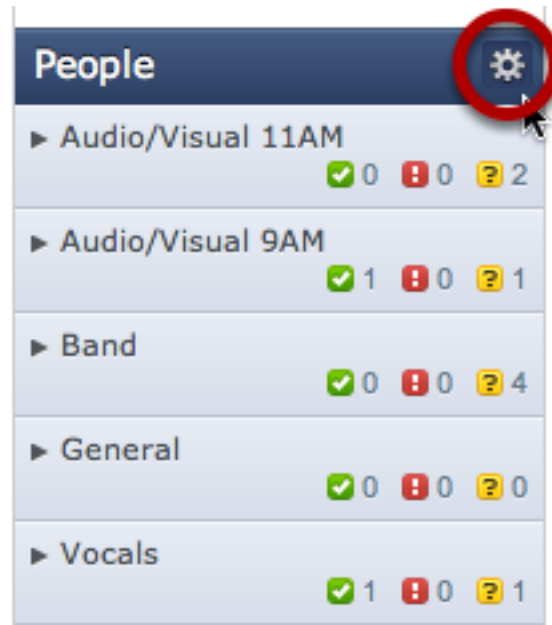
8. **Stage Layout Options-** If you want this category to be included in your stage layout, you'll need to indicate either Initials or Name for the first box, and then the color for the second box.

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

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

[March 31, 2011](#)

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)

[April 28, 2011](#)

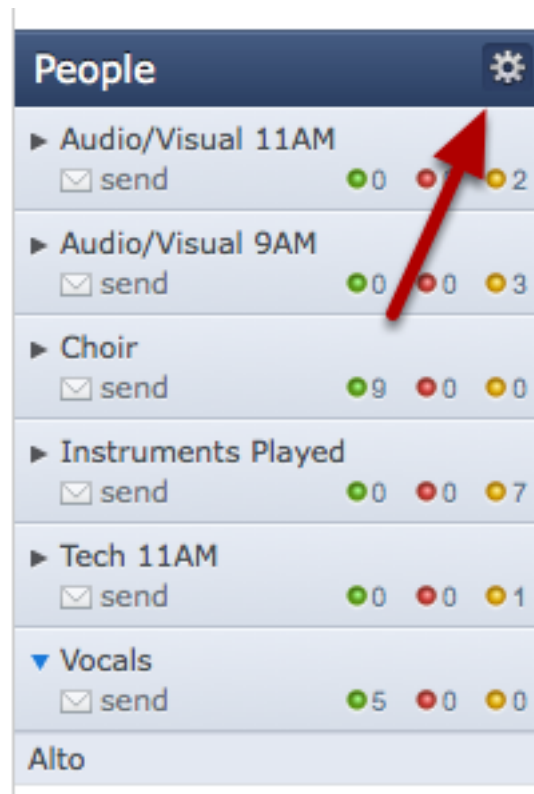
[May 5, 2011](#)

[May 12, 2011](#)

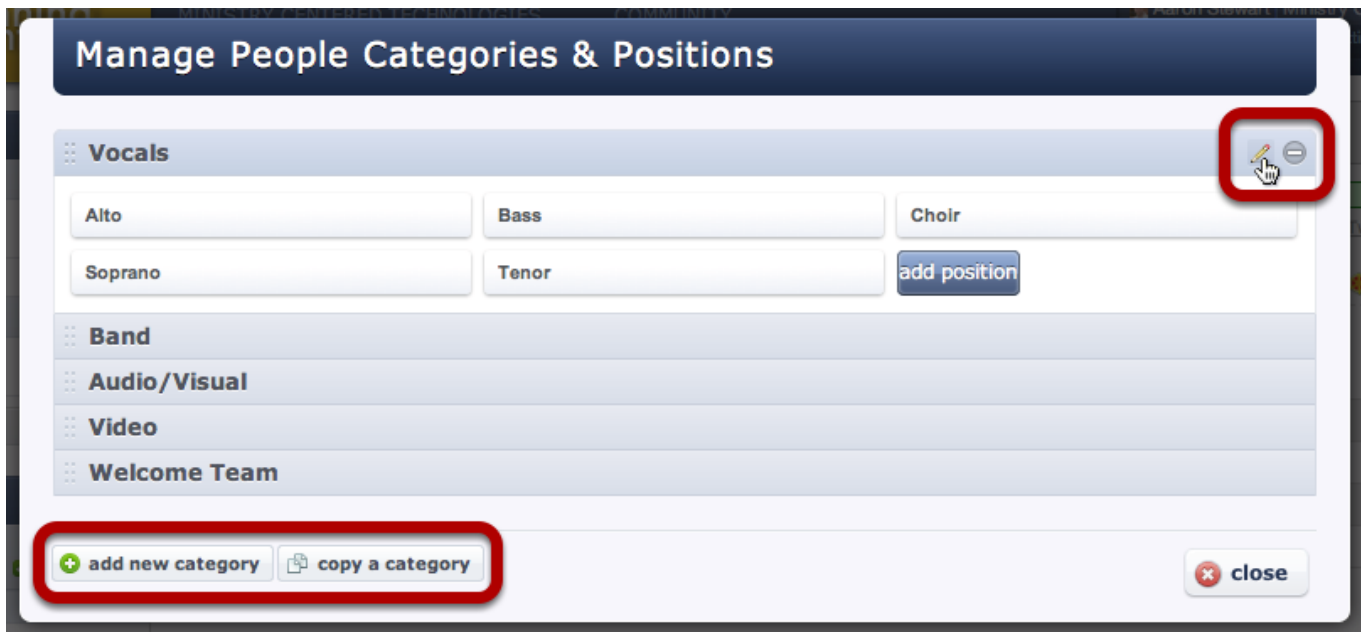
[May 19, 2011](#)

[May 26, 2011](#)

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

Edit Category

Name

Assign People Directly Assign Using Custom Properties

Default Scheduling Options

Status:

Send Replies For: Accept Decline

Send Replies To: **Aaron Stewart**
[pick a different person](#) [clear](#)
 Update future schedules

Scheduled Viewers See:

Prepare Notification

Stage Layout Options

Stage Icon:

[cancel](#)

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



Manage People Categories & Positions

Vocals

Alto Bass Choir
Soprano Tenor **add position**

Band

Audio/Visual

Video

Welcome Team

+ add new category copy a category close

Assigning People Directly to your Positions (option 1)



Edit Position

Name: Acoustic Guitar

Service: La Quinta/Main Campus Category: Band

Assigned People:

Hannah Berg
Jeff Spill
Jenn Cole
Shannon Berg
Tester Viewer
Testing Person
Thomas Berg

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)

Create Position

Name: 1

Service: East Valley Campus Category: Instrumentalists

Criteria 2 You currently have 5 people selected for this position.

Custom Properties	Instruments Played options	Selected Options
Children's Volunteers >	Bass Guitar	Instruments Played Piano
Hospitality >	Drums	
Instruments Played >	Electric Guitar	
Leaders >	Keys	
Tech >	Organ	
Vocals >	Percussion	
	Piano	

Attachment Types:

Chord Chart Chord Chart Acoustic Lead Guitar MP3 Alto

MP3 Soprano MP3 Tenor

Accept [cancel](#)

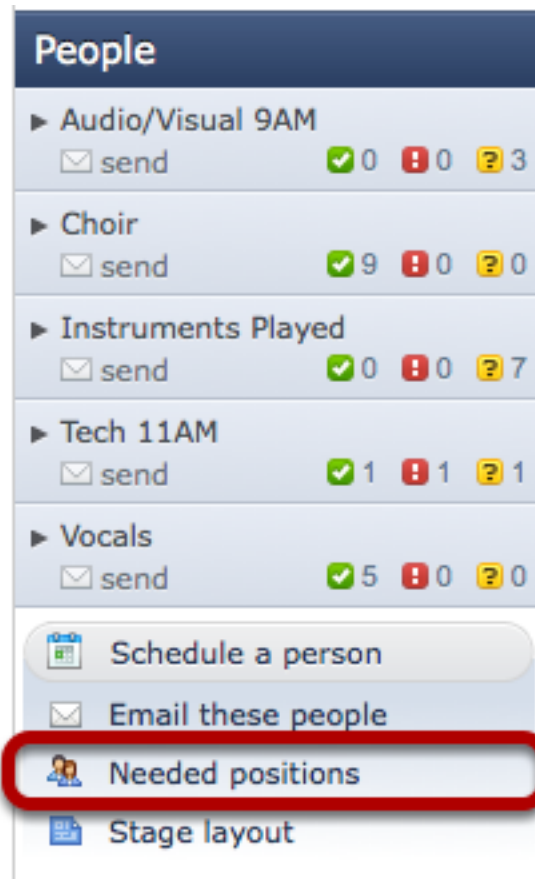
If you chose the option to "Assign People Using Custom Properties" to your Category using the green toggle above, this is where you link this position with your Custom Properties. Any people assigned to the Selected Options will be assigned to this position. In this case, I have the Piano position pulling 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

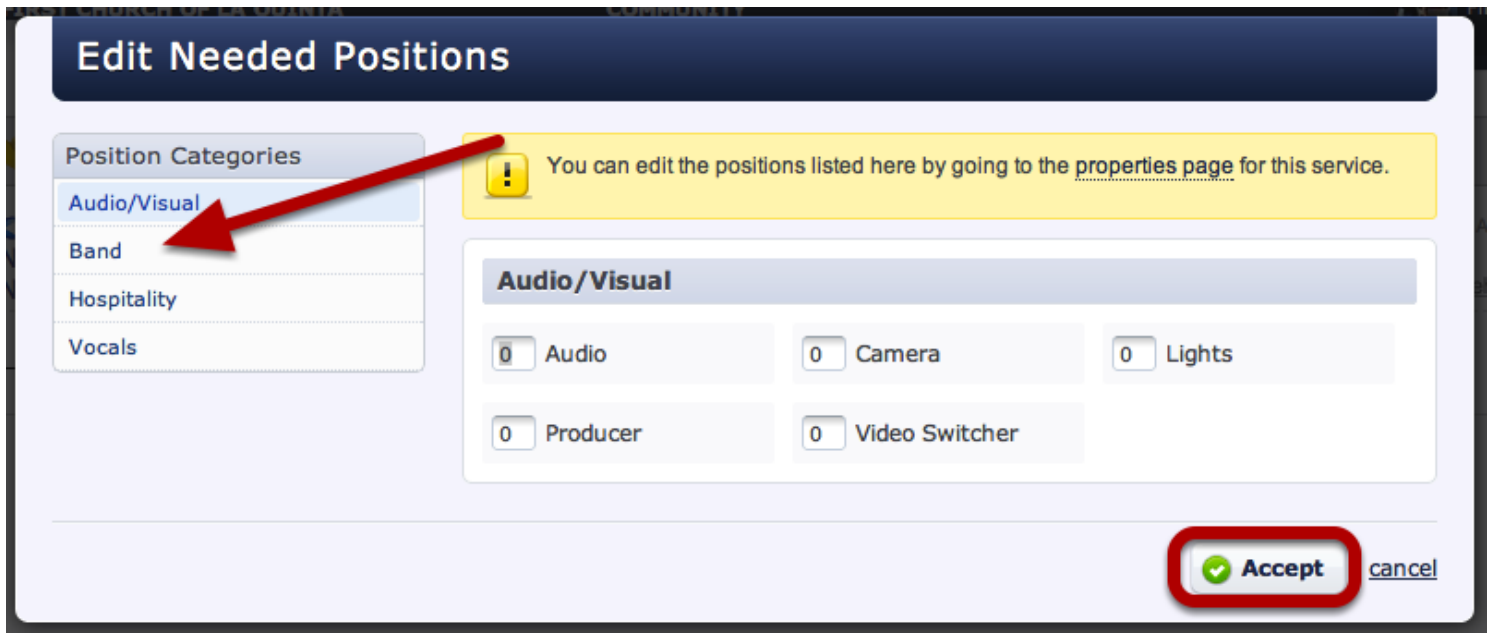
Setup Needed Positions when you don't know *who* you want to schedule, but you know you will need a certain number of people to fill a position. Add Needed Positions to [templates](#) when you will need the same number of people each week to greatly simplify your scheduling.

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



Edit Needed Positions

Position Categories

- Audio/Visual
- Band
- Hospitality
- Vocals

You can edit the positions listed here by going to the [properties page](#) for this service.

Audio/Visual

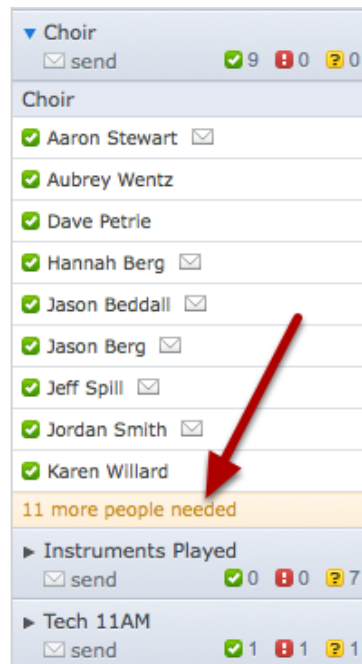
Audio Camera Lights

Producer Video Switcher

Accept [cancel](#)

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



▼ Choir

send 9 0 0

Choir

- Aaron Stewart
- Aubrey Wentz
- Dave Petrie
- Hannah Berg
- Jason Beddall
- Jason Berg
- Jeff Spill
- Jordan Smith
- Karen Willard

[11 more people needed](#)

► Instruments Played

send 0 0 7

► Tech 11AM

send 1 1 1

Using needed positions makes your scheduling easier. Just click on the '[_ more people needed](#)' link.

Select People For Alto

You still need 7 people for the 'Alto' position.

Name	Last used Anywhere
<input type="checkbox"/> Jannina Garde	April 27, 2011
<input type="checkbox"/> Jennifer Arevalo	June 5, 2011
<input type="checkbox"/> Jennifer Joseph	September 15, 2010
<input type="checkbox"/> Jordan Bodine	May 14 & 15, 2011
<input type="checkbox"/> Laura Bodine	September 7, 2011
<input type="checkbox"/> Mayowa Sobamowo	May 21 & 22, 2011
<input type="checkbox"/> Shannon King	May 11, 2011
<input checked="" type="checkbox"/> Shelby Black 1 block out	May 15, 2011
<input type="checkbox"/> Tess Black	May 8, 2011

Block-Out Dates
05/20/2011 to 08/28/2011
Europe trips, and working at that summer camp in California again!

Add

Accept [cancel](#)

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

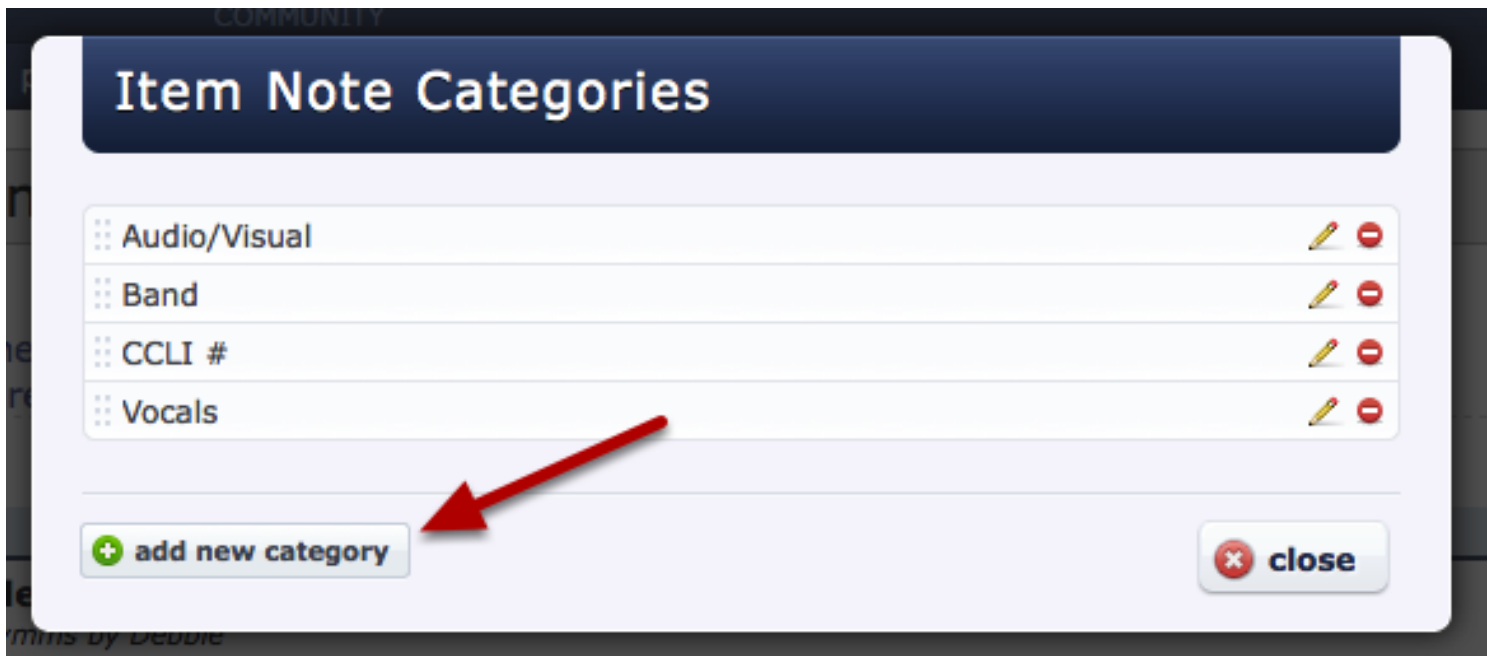


If you have existing note categories, notes that are set to "Sticky" will always be visible



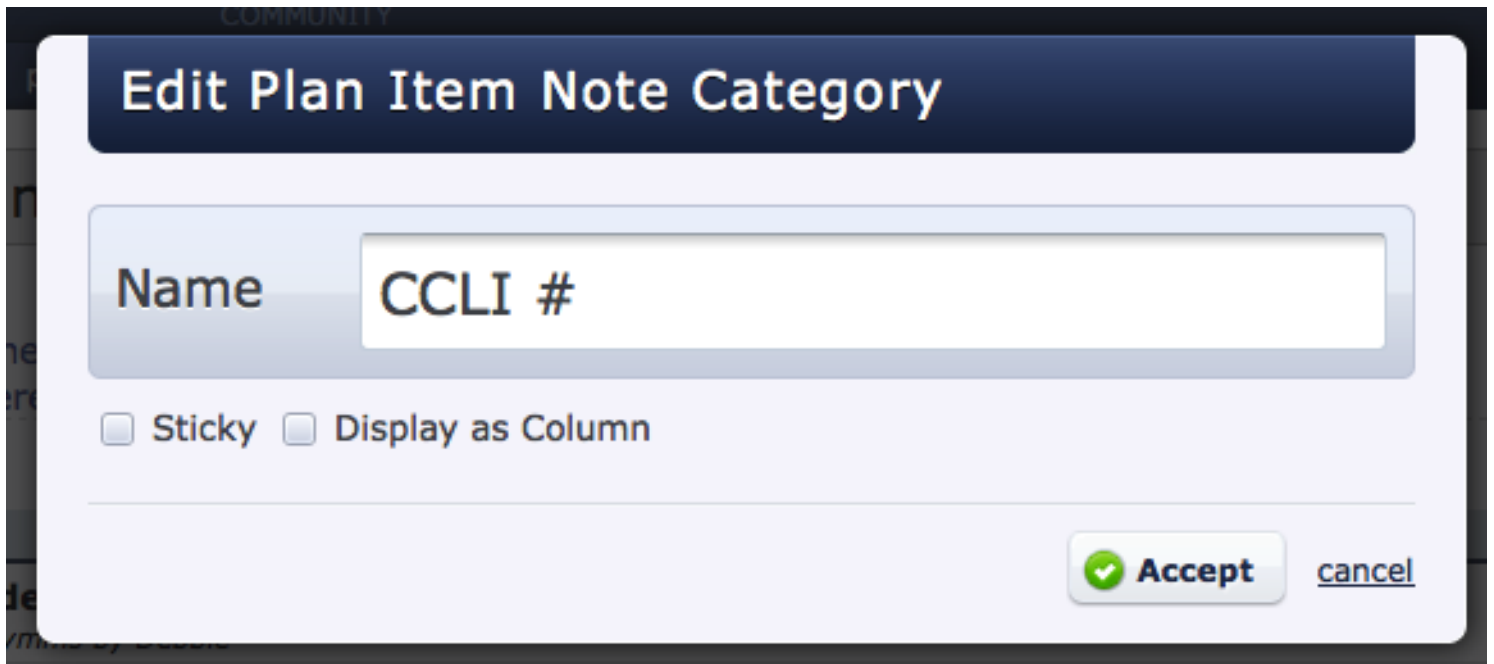
To select your other note categories for this item, click on the 'add another note' button (1), and then select your note category (2)

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 whether 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 individual 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

First Wednesday

UPCOMING PLANS

[view all plans](#)

[March 2, 2011](#)

[April 6, 2011](#)

[May 4, 2011](#)

SERIES TITLE

PLAN TITLE

Night of
Worship

Laura Bodine
1 day ago

Night of
Worship

Drew Bodine
12 days ago

Night of
Worship

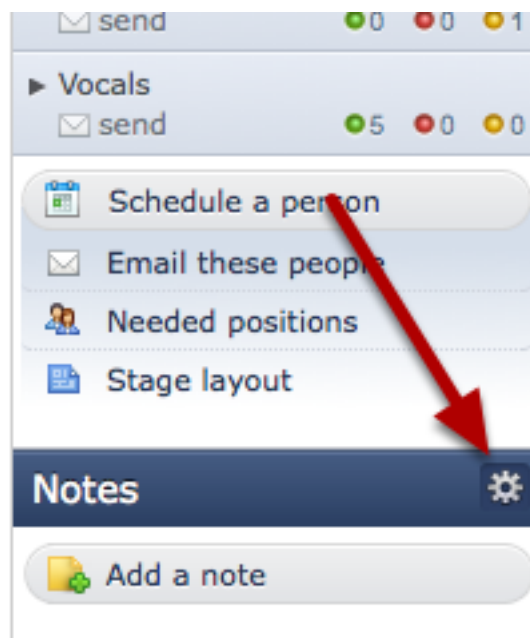
Drew Bodine
12 days ago

ATTACHMENTS

[+ create a new plan](#) [matrix](#) [reports](#) [properties](#)

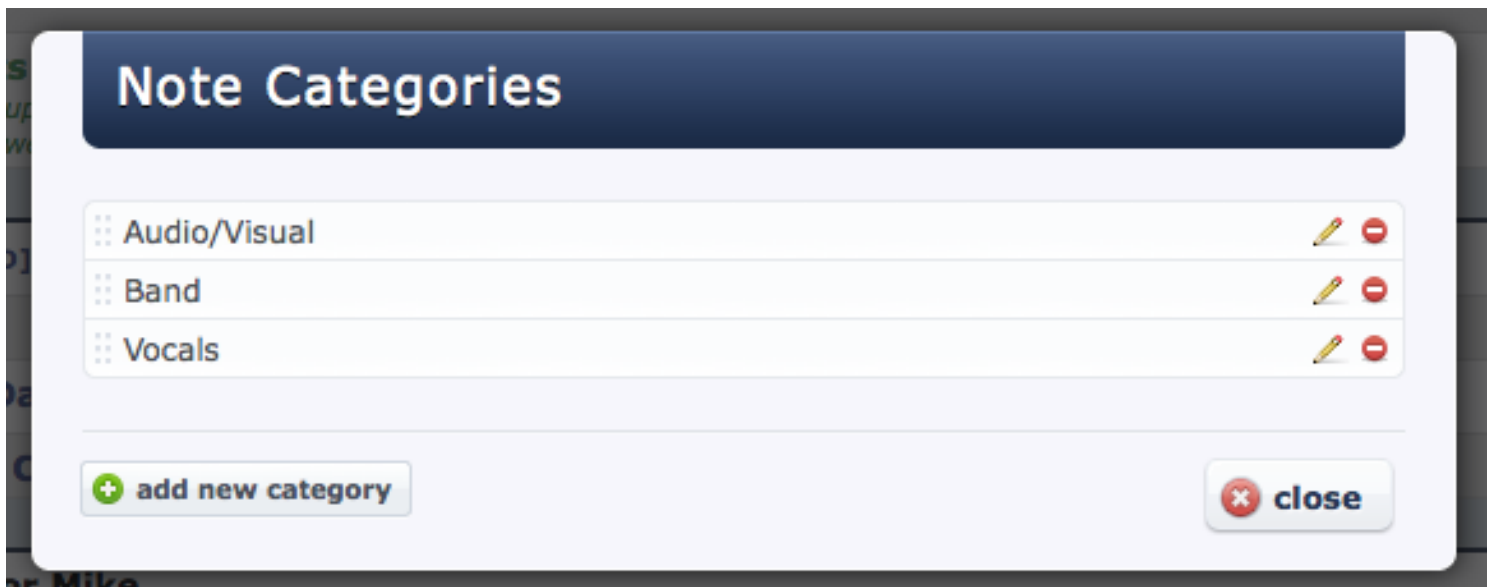
[+ link to an attachment](#) [+ upload an attachment](#)

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



The screenshot shows a vertical menu of options. At the top, there are 'send' buttons with status indicators (0 green, 0 red, 1 yellow). Below these are 'Vocals' and another 'send' button (5 green, 0 red, 0 yellow). The main menu items are: 'Schedule a person', 'Email these people', 'Needed positions', and 'Stage layout'. The 'Notes' item is highlighted in a dark blue bar and has a gear icon to its right. A red arrow points to this gear icon. Below the 'Notes' bar is an 'Add a note' button with a green plus icon.

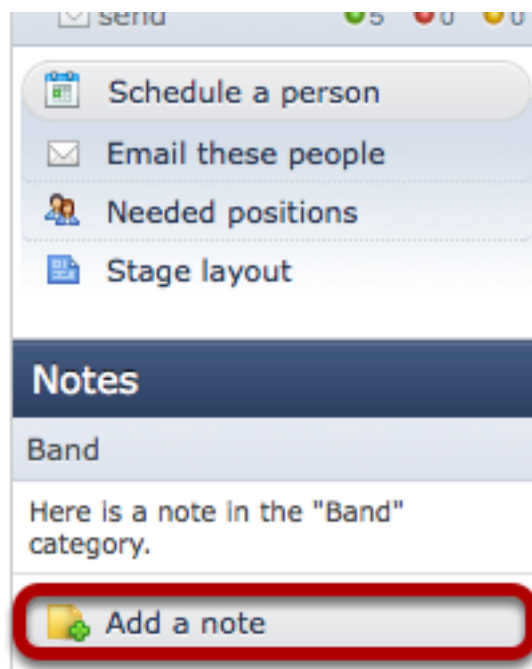
Editing your note categories



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

▼ Plan Notes	
1. Global Announcements	
Band	Here's a note in the "Band" category.
Dance	
Leaders	
Lights	
Live Video	
Tech	
Vocals	

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 lesson](#).

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:

La Quinta/Main Campus

March 14, 2010
Philippians
Finding Joy

3/14 9:00a	3/14 11:00a	Length in mins	
Pre-Service			
27s	10:50a	10	Prelude <i>Piano Hymms by Debbie</i>
Worship Set			
18s	11:00a	4	Cannons
10:29.56a	11:04a	3:45	Amazing God [D]
	11:07.45a	1:30	Prayer by Pastor Mike <i>Band continues to play.</i>
	11:09.15a	3:30	The Wonderful Cross
	11:12.45a	3	All Creatures Of Our God A
	11:15.45a	4	Indescribable

To reset this, click Live in that plan.

Public Access: [Disabled](#)

[+](#) [add an item](#) [rehearse](#) [matrix](#) [live](#) [print this plan](#)

2 attachments

2 notes
5 attachments
1 note

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

3:11:19

3:28

Started At: 3:11p (37068:58 ahead)

Amazing God

Next

4m00s at 09:03 am
Cannons
Test note

Coming Up Later

1m30s at 09:07 am
Prayer by Pastor Mike

3m30s at 09:09 am
The Wonderful Cross

4m00s at 09:12 am
Indescribable

Audio/Visual Camera 1
Band V-C-V-C-C-V

Release control Previous Next

Online Users Live Chat

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

7058:01

La Quinta/Main Campus

Traditional Service

at 08:50 am
ude
Hymns by Debbie

ning Up Later

hip Set

at 09:00 am
zing God

at 09:03 am
ions

Release control Start

Your times are reset!

center

plans songs media people songs medi

La Quinta/Main Campus

March 14, 2010

Philippians
Finding Joy

3/14 9:00a	3/14 11:00a	Length in mins	
Pre-Service			
8:50a	10:50a	10	Prelude <i>Piano Hymns by Debbie</i>
Worship Set			
9:00a	11:00a	4	Cannons
9:04a	11:04a	3:45	Amazing God [D]
9:07.45a	1:07.45a	1:30	Prayer by Pastor Mike <i>Band continues to play.</i>
9:09.15a	1:09.15a	3:30	The Wonderful Cross
9:12.45a	1:12.45a	3	All Creatures Of Our God And King
9:15.45a	1:15.45a	4	Indescribable

Audio/Visual
send 0 0 4

Band

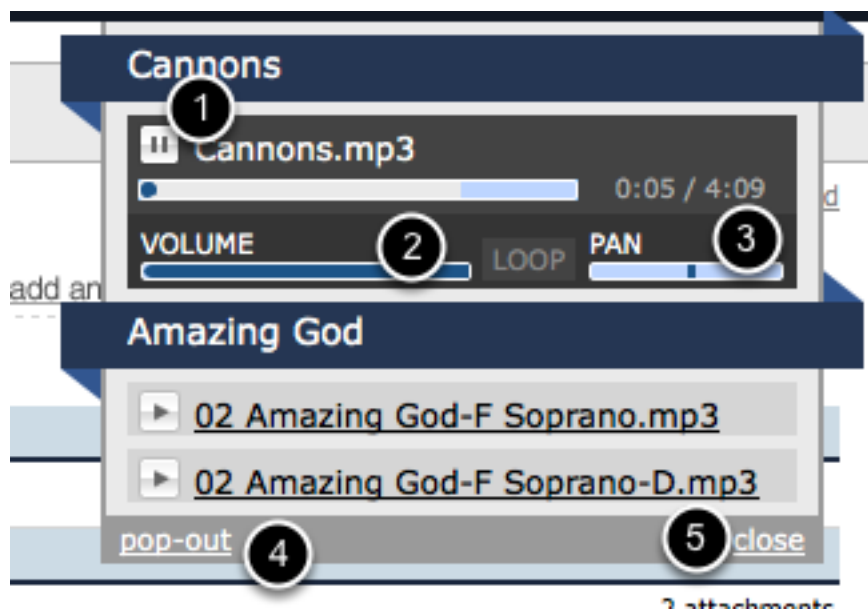
Streaming and Downloading Songs in a Plan.

This lesson shows users how to stream songs when they are looking at a plan. It also covers how to download 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:

The screenshot shows a music library interface. At the top, there is a header for "Cannons" with "2 attachments". Below it is a section for "Amazing God [D]" with "Central Worship" as a subtitle, "2 notes", and "4 attachments". The interface is split into two columns: "Notes" and "Attachments".

Notes:

- Audio/Visual:** Camera 1
- Band:** V-C-V-C-C-V

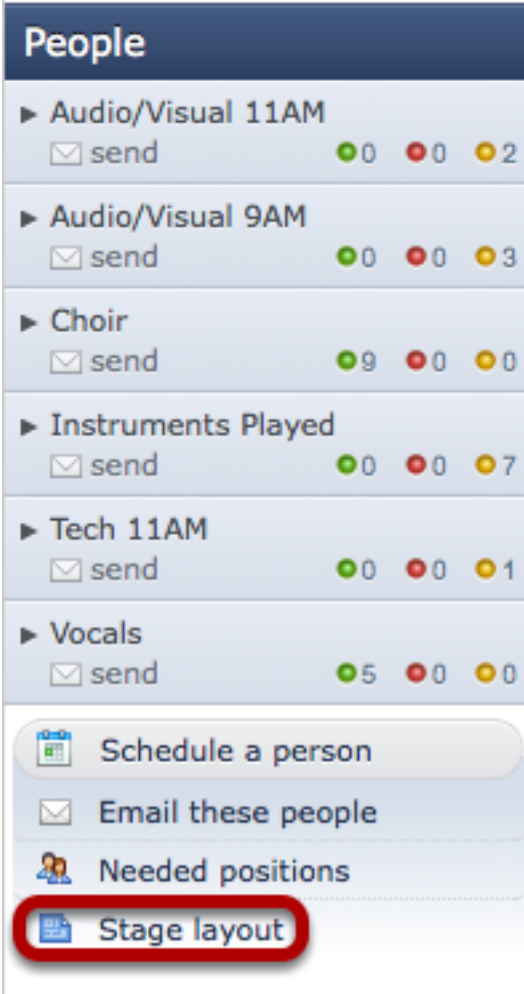
Attachments:

- Arrangement attachments
- 02 Amazing God - F Soprano.mp3** (highlighted with a red box)
- Amazing God (lyrics).pdf
- D attachments

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.



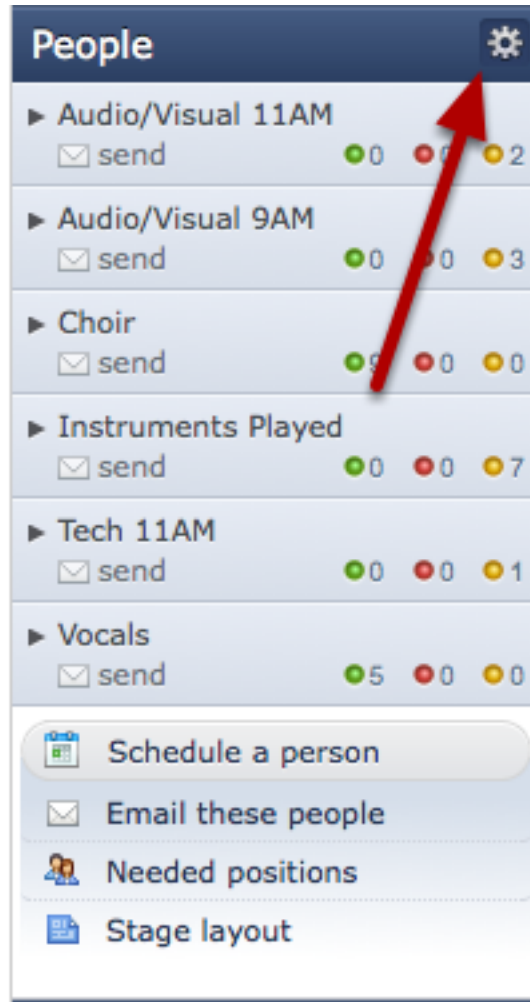
The screenshot displays a 'People' interface with a list of roles and a menu. The roles listed are:

- Audio/Visual 11AM (0 green, 0 red, 2 yellow)
- Audio/Visual 9AM (0 green, 0 red, 3 yellow)
- Choir (9 green, 0 red, 0 yellow)
- Instruments Played (0 green, 0 red, 7 yellow)
- Tech 11AM (0 green, 0 red, 1 yellow)
- Vocals (5 green, 0 red, 0 yellow)

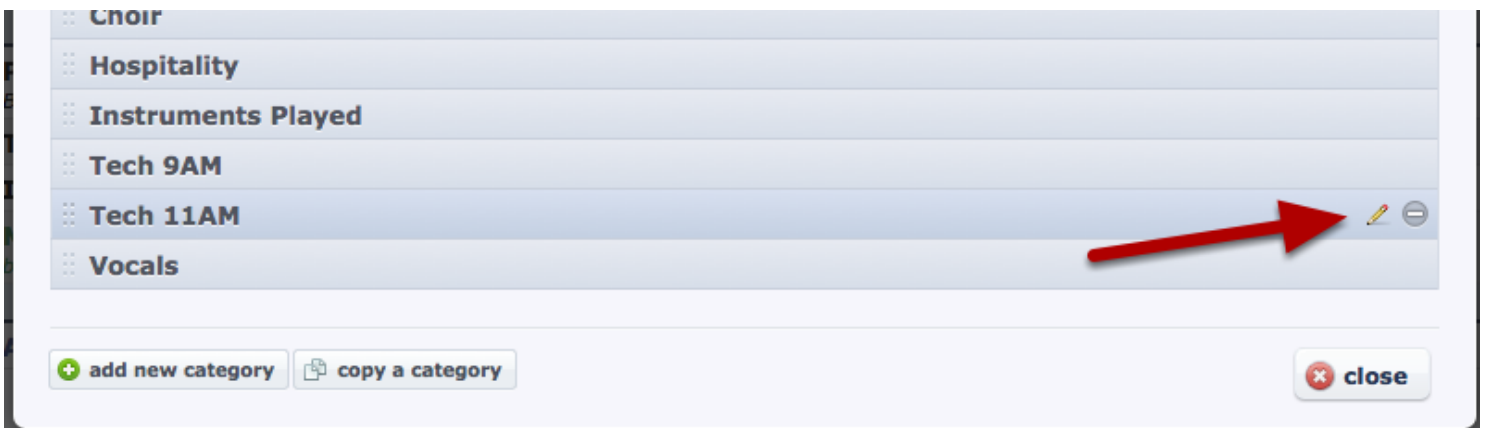
The menu below the roles includes the following options:

- Schedule a person
- Email these people
- Needed positions
- Stage layout** (highlighted with a red circle)

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.


The screenshot shows the 'Edit Category' interface. At the top, the title 'Edit Category' is displayed in a dark blue header. Below it, the 'Name' field contains 'Audio/Visual 11AM'. The 'Default Scheduling Options' section includes a 'Status' dropdown set to 'Unknown', 'Send Responses For' with checked boxes for 'Accept' and 'Decline', and 'Send Responses To' with a search dialog box containing 'Use this dialog to search' and 'LastName, FirstName'. The 'Scheduled Viewers See' dropdown is set to 'Full Plan'. A 'Prepare Notification' checkbox is checked. The 'Stage Layout Options' section is highlighted with a red arrow. It features a 'Stage Icon' dropdown menu with options: 'Not Used', 'Name' (selected), 'Small Name', and 'Initials'. To the right of the dropdown is a color selection dropdown set to 'Orange', which is circled in red. At the bottom right, there are 'Accept' and 'cancel' buttons.


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'


People


- ▶ Audio/Visual 11AM
✉ send ● 0 ● 0 ● 2
- ▶ Audio/Visual 9AM
✉ send ● 0 ● 0 ● 3
- ▶ Choir
✉ send ● 9 ● 0 ● 0
- ▶ Instruments Played
✉ send ● 0 ● 0 ● 7
- ▶ Tech 11AM
✉ send ● 0 ● 0 ● 1
- ▶ Vocals
✉ send ● 5 ● 0 ● 0

 Schedule a person

 Email these people

 Needed positions

 Stage layout



Choose which stage layout you'd like.

Please Select A Stage Template

 You can create your own base stage templates [on this page.](#)



STAGE LAYOUT

Width: 700 Height: 350 Select This Template



GRID LAYOUT

Width: 700 Height: 400 Select This Template



FAKE LAYOUT

Width: 720 Height: 540 Select This Template



PICTURE

Width: 1000 Height: 444 Select This Template



SDF

Width: 963 Height: 700 Select This Template



TEST

Width: 1000 Height: 447 Select This Template

 cancel

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.

The screenshot shows a software interface for editing a stage layout. At the top, a dark blue header contains the text "Editing stage". Below this is a light blue bar with a search field containing "Stage Layout" and a "Print" button with a printer icon. The main area is a trapezoidal stage with a grey floor and a white background. On the stage, there are several colored buttons representing people and their roles: "Jeff S" (Choir) in a dark grey button, "Jenn C" (Percussion) in a green button, "Jordan S" (Choir) in a dark grey button, "Aaron S" (Worship Leader) in a dark blue button, and "Jordan S" in an orange button. At the bottom of the stage, there are three orange buttons: "Cuddles B" (Audio), "Hannah B" (Camera), and "Thomas B" (Producer). Below the stage, there is a link "add another stage layout" and two buttons: "Accept" with a green checkmark and "cancel".

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.

Please Select A Stage Template

 You can create your own base stage templates [on this page.](#)



STAGE LAYOUT

Width: 700 Height: 350 Select This Template



GRID LAYOUT

Width: 700 Height: 400 Select This Template



FAKE LAYOUT

My Fake stage layout
Width: 720 Height: 540 Select This Template



PICTURE

Width: 1000 Height: 444 Select This Template



SDF

Width: 963 Height: 700 Select This Template



TEST

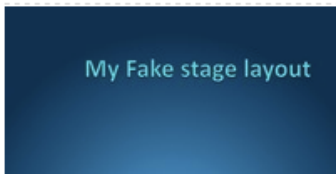
Width: 1000 Height: 447 Select This Template

 cancel

Click on 'create a new template'.

First Church Of La Quinta Stage Templates

[+ create a new template](#)



FAKE LAYOUT

Width: 720px

Height: 540px

Used 1 times

[Edit](#) [Destroy](#)



PICTURE

Width: 1000px

Height: 444px

Used 0 times


[Edit](#) [Destroy](#)

Import your stage layout picture.

New Stage Template

Name

Background no file selected

 Background Images must not be any larger than 1000px wide by 1000px high. We suggest a width of 700 pixels when designing for printing in portrait and 1000 pixels when designing for printing in landscape.

[cancel](#)

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.



The screenshot shows a user interface titled "Stages". It features a table with two columns: "Name" and "Last Updated". The table lists three stage layouts: "Fake Layout", "Picture", and "Stage Layout". Each row has a red circle with a minus sign to its left, indicating a delete option. The "Last Updated" column shows the user and time for each layout. At the bottom left, there is a link "add another stage layout". At the bottom right, there is a "cancel" button with a red 'x' icon.

Name	Last Updated
 Fake Layout	by Scott Motte at 8 days ago
 Picture	by Scott Motte at 8 days ago
 Stage Layout	by Tester Administrator at 8 days ago

[add another stage layout](#) 

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 its properties.

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



Pre-Service

8:50a 10 **Prelude**
Piano Hymms by Debbie

Worship Set

9:00a 3:45 **Amazing God [D]**

9:03.45a 4:15 **Cannons**  
Test note

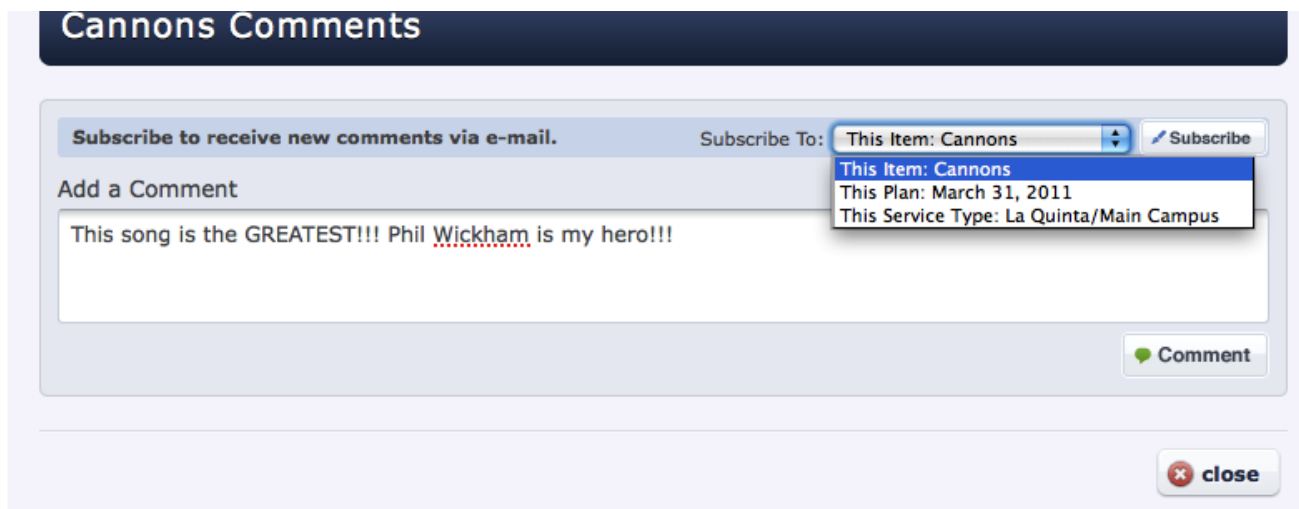
9:08a 1:30 **Prayer by Pastor Mike**
Band continues to play.

9:09.30a 3:30 **The Wonderful Cross**


9:13a 4 **Indescribable**

Message

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





Cannons Comments

Subscribe to receive new comments via e-mail. Subscribe To: **This Item: Cannons** 

Add a Comment

This song is the GREATEST!!! Phil Wickham is my hero!!!

 Comment

 close

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.

Cannons Comments

Subscribe to receive new comments via e-mail. Subscribe To: This Item: Cannons [Subscribe](#)

Add a Comment

[Comment](#)

Reagan Helms Ministry Centered Technologies posted 2 minutes ago

This song is the GREATEST!!! Phil Wickham is my HERO!!!

Aaron Stewart First Church Of La Quinta

Hey Reagan, don't forget that I'm singing this weekend. So we're singing it in the key of A

[reply to this comment](#)

[close](#)

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

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

[April 28, 2011](#)





[May 5, 2011](#)

[May 12, 2011](#)

[May 19, 2011](#)

[May 26, 2011](#)

ATTACHMENTS

  [Database Backup.zip](#)   [Video A.mov](#)

 [Add an attachment](#)

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

Service Title

Folder Frequency Attachment types Comment permissions

A person's last date scheduled should be from

Load the matrix with previous and next plans.

[Delete this service type](#)

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

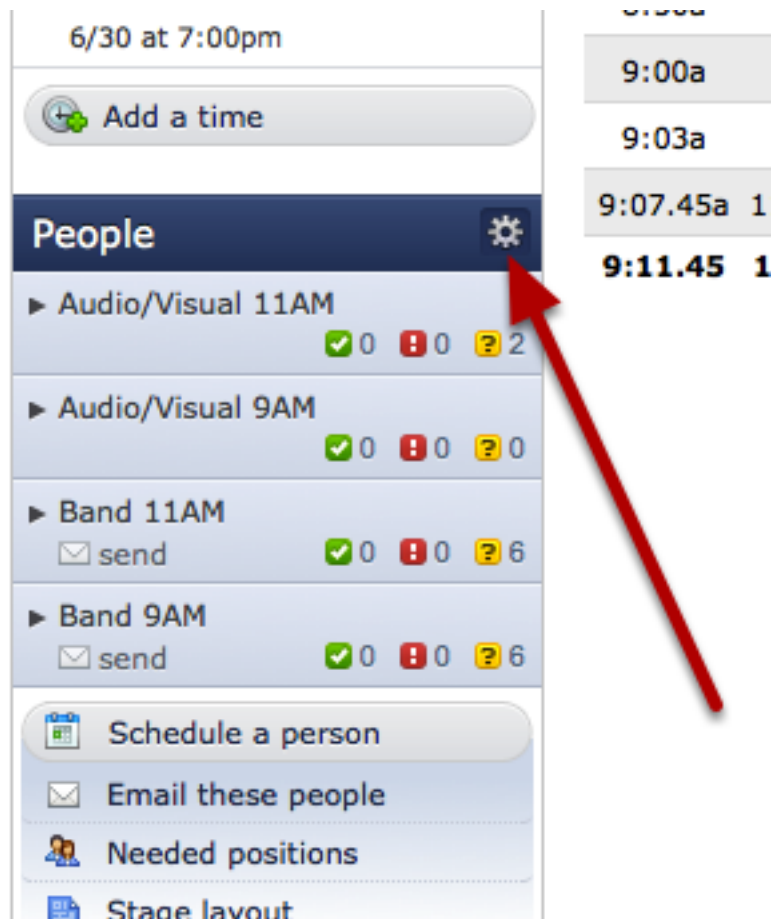
All Service Types In: (folder name) - Will show you the last time that they have been scheduled to any service in the folder that this particular service is currently in. In this case "Weekend Worship Services".

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".

Manage People Categories & Positions

Audio/Visual 11AM

Camera 1

Camera 2

add position

Audio/Visual 9AM

Band 11AM

Band 9AM

Leaders 9AM

Leaders 11AM

Tech 9AM

Tech 11AM

Ushers 9AM

Ushers 11AM

View your recently deleted categories.

+ add new category

copy a category

close

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

Click to recover the deleted category.

Ushers 9AM

Ushers 11AM



View your recently deleted categories.

Recover 'Usher' deleted by Tester Viewer on 06/23




+ add new category

copy a category

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

 **East Valley Campus** 

◀ June 24, 2011 ▶
No series title set - [click here to change](#)
No plan title set - [click here to change](#)


6/24 9:00a	6/24 11:00a	Length in mins	
8:50a	10:50a	10	▶ Prelude   
9:00a	11:00a	3	▶ Blessed Be Your Name
9:03a	11:03a	4:45	▶ Cannons
9:07.45a	11:07.45a	4	▶ You're Worthy Of My Praise
9:11.45	11:11.45	11:45	


Hover over Item Notes and click the settings button.

Prelude

10 : 0 Pre-Service
min sec

Item Description

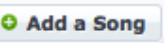
Detail
Click edit to enter item detail.  edit

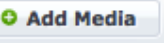
Item Notes 


Audio/Visual

Band

Person




Linked Song
There is no song attached to this item.


Linked Media


◀ prev next ▶  Accept [cancel](#)


Click to view categories, then recover any deleted categories.

Item Note Categories

- Audio/Visual  
- Band  
- Person  





 View your recently deleted categories.


Recover 'Vocals' deleted by Tester Viewer on 06/22


 **add new category**  **close**

Follow same directions for Note Categories.

▶ Band 9AM
send ✔ 0 ! 0 ? 6

-  Schedule a person
-  Email these people
-  Needed positions
-  Stage layout

Notes 

 Add a note

Attachments

East Valley Campus Attachments

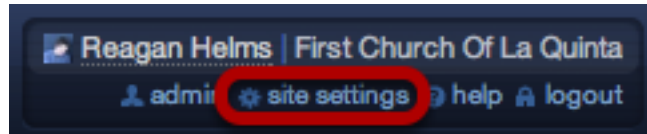
05 SOPRANO - HARK!.mp3

Site Settings

Site Settings

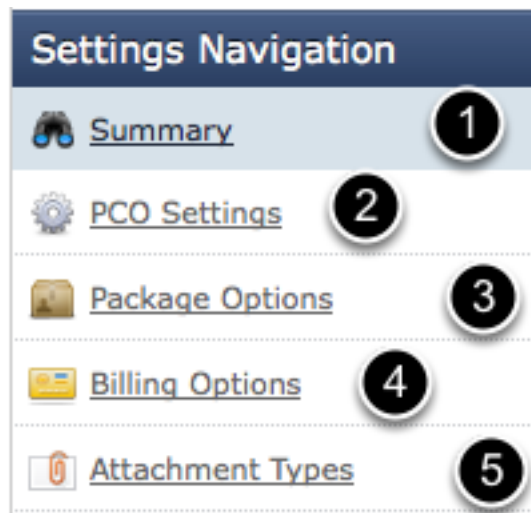
This is an overview lesson of each element of the 'site settings' page.

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

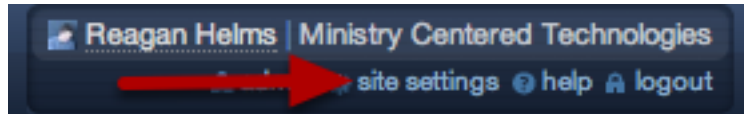
The screenshot shows the 'Summary Page' for a church account. On the left is a 'Settings Navigation' sidebar with links for Summary, PCO Settings, Package Options, Billing Options, and Attachment Types. A red box labeled '4' highlights the 'Disable Music Stand' button and its associated text. The main content area is titled 'Site Settings' and contains three sections: 'Account Summary', 'Account Administrators', and 'Usage'. A red box labeled '3' highlights the 'Organization Information' section, which shows the church name 'First Church Of La Quinta' and a logo upload area. A red box labeled '1' highlights the 'Account Administrators' section, listing the Primary Account Administrator (Aaron Stewart) and the Secondary Account Administrator (Tester Administrator). A red box labeled '2' highlights the 'Usage' section, which displays statistics for Services (10), Plans (303), Active People (35), Files (107), and File Space (478.6 MB).

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

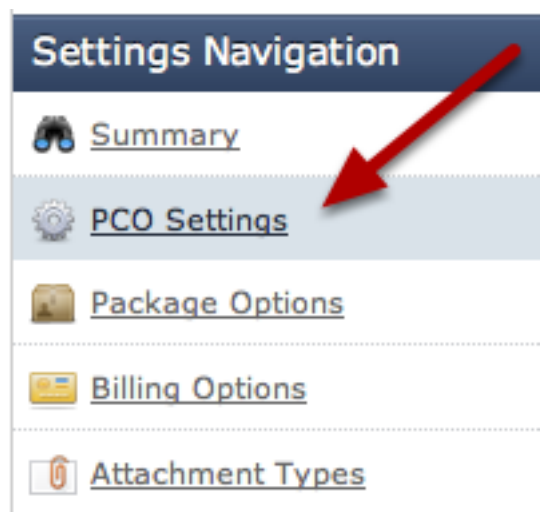
Change the default settings for your account, including calendar, time zone, country and new user settings

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

Calendar Starts On:
Sunday 1

Default User Permissions:
Scheduled Viewer 2

Block Viewers From Viewing People:
False 3

Block Schedulers From Editing People:
False 4

Allow Admins To Delete Anything:
False 5

Country:
United States 6

Time Zone:
(GMT-08:00) Pacific Time (US & Canada) 7

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

File Settings

Default Attachment Setting For Allow MP3 Downloads: **1**
True

Default Person Setting For Access **Plan** Attachments:
True

Default Person Setting For Access **Song** Attachments: **2**
True

Default Person Setting For Access **Media** Attachments:
True

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

CCLI Settings

CCLI Number:
1234

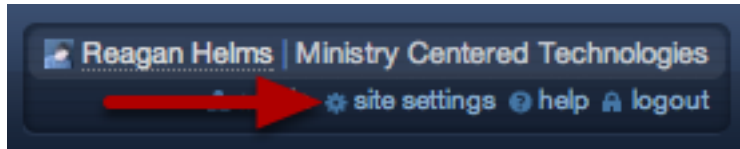
CCLI Reporting:
[Disable CCLI Reporting](#)

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

Site Settings

Planning Center Packages

Your Package

Package Name	Package Cost	Extra File Storage	Your Payment Method:	Your next payment: (for 1 mon
Plus	\$49/month	[Enable 'Extra File Storage']	Credit	February, 29, 2012 on your credit card ending in .

Package Options

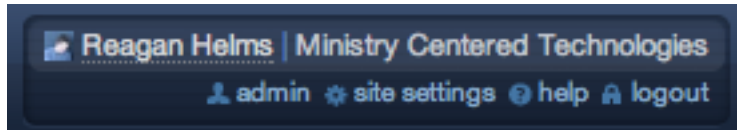
	Free	Lite	Basic	Plus	Premium
	\$0 monthly Downgrade	\$14 monthly Downgrade	\$29 monthly Downgrade	\$49 monthly ★ Current Plan	\$99 monthly Upgrade
Service Types	1	2	3	6	25
People	10	35	75	250	Unlimited
Included space for file sharing	50 MB	250 MB	1 GB	5 GB	15 GB
Music Stand Price	N/A	\$2/month	\$5/month	\$10/month	\$10/month

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

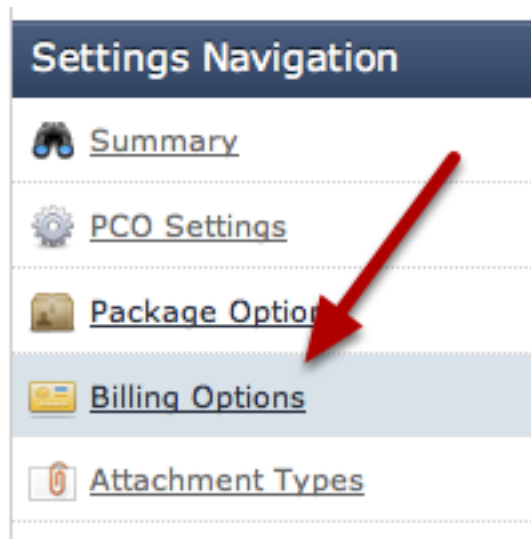
Change your payment information or view your billing history

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

Your Billing Info

Payment Method: Credit Card Check

Payment Schedule: \$0 every month \$0 every 3 months

Your card will be charged immediately.

Street Address:

Zip Code:

Credit Card Number:

Expiration Date:

Security Code:

[Change Payment Method](#)

Payment History

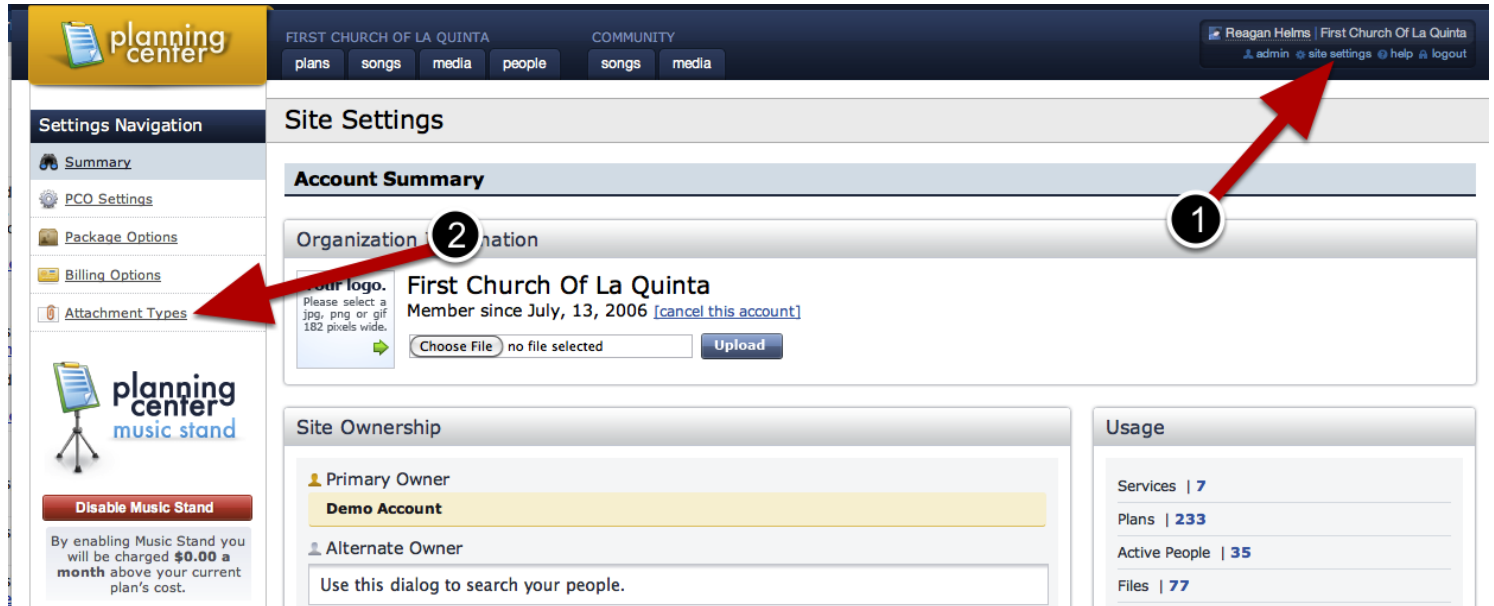
<u>Payment Date</u>	<u>Payment Amount</u>	<u>Status</u>
---------------------	-----------------------	---------------

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.

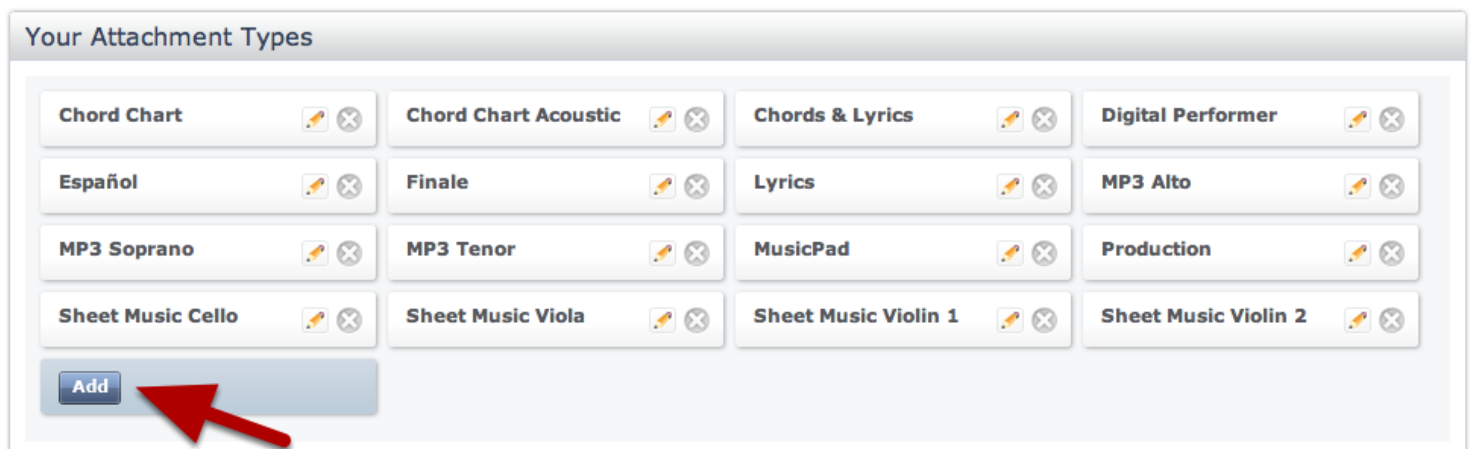
Go to the Site Settings page and click Attachment Types.



The screenshot shows the 'Site Settings' page for 'FIRST CHURCH OF LA QUINTA'. The left sidebar contains 'Settings Navigation' with options like 'Summary', 'PCO Settings', 'Package Options', 'Billing Options', and 'Attachment Types'. The main content area is titled 'Site Settings' and includes an 'Account Summary' section with an 'Organization' section for 'First Church Of La Quinta'. A red arrow points to the 'Attachment Types' link in the sidebar, and another red arrow points to the 'site settings' link in the top right navigation bar. The 'Organization' section shows a file upload area with a 'Choose File' button and an 'Upload' button. The 'Site Ownership' section shows 'Demo Account' as the primary owner. The 'Usage' section shows statistics for Services (7), Plans (233), Active People (35), and Files (77).

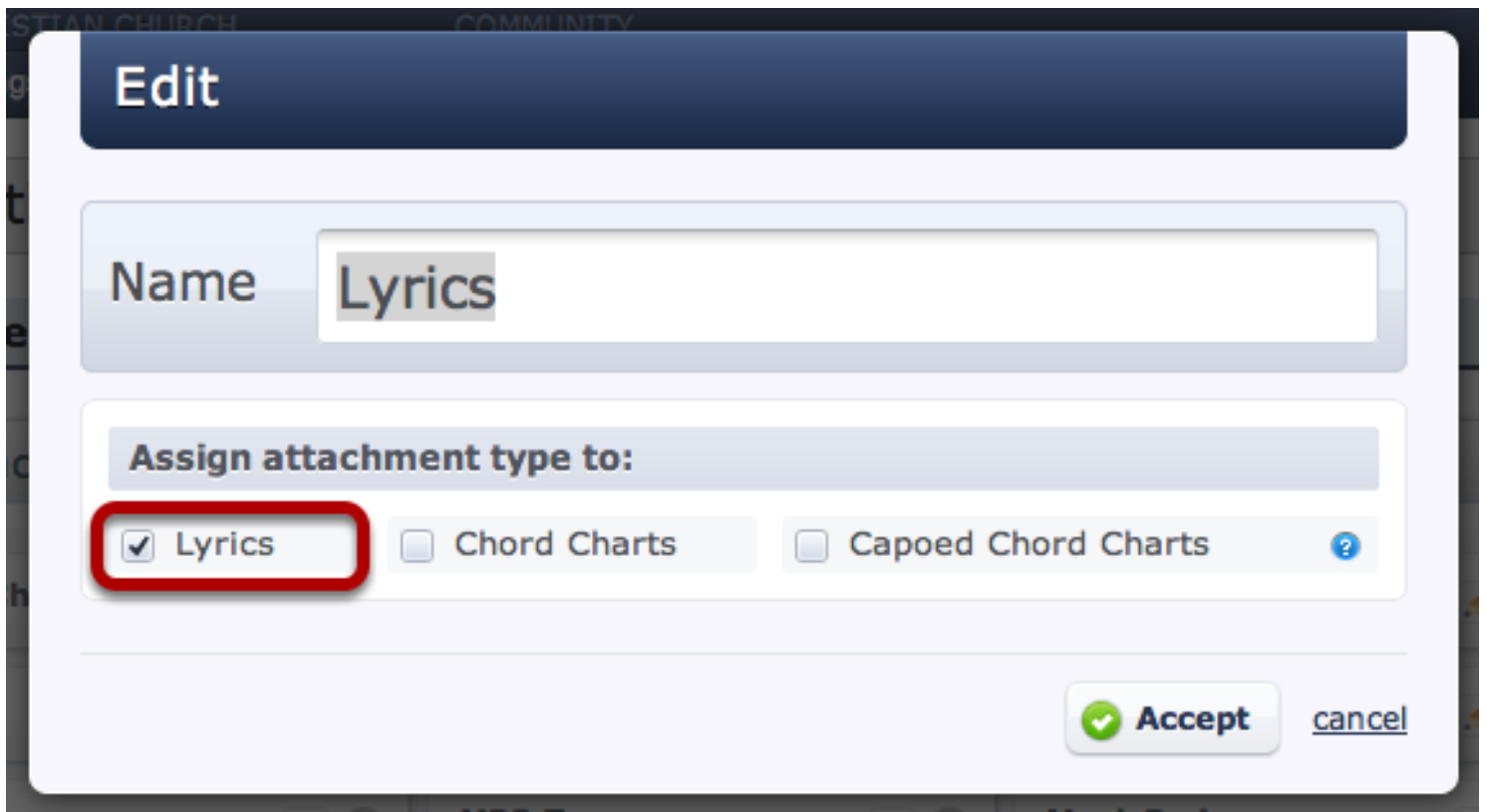
Only the Primary and Secondary Account Administrators can access the site settings page.

Click the blue add button



The screenshot shows the 'Your Attachment Types' page. It displays a grid of attachment types with edit and delete icons for each. The attachment types are: Chord Chart, Chord Chart Acoustic, Chords & Lyrics, Digital Performer, Español, Finale, Lyrics, MP3 Alto, MP3 Soprano, MP3 Tenor, MusicPad, Production, Sheet Music Cello, Sheet Music Viola, Sheet Music Violin 1, and Sheet Music Violin 2. A red arrow points to the 'Add' button at the bottom left.

Add your attachment type



Edit

Name

Assign attachment type to:

Lyrics Chord Charts Capoed Chord Charts [?](#)

[cancel](#)

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.

FIRST CHURCH OF LA QUINTA COMMUNITY

plans songs media people songs media




























Site Settings

Attachment Types

Your Attachment Types

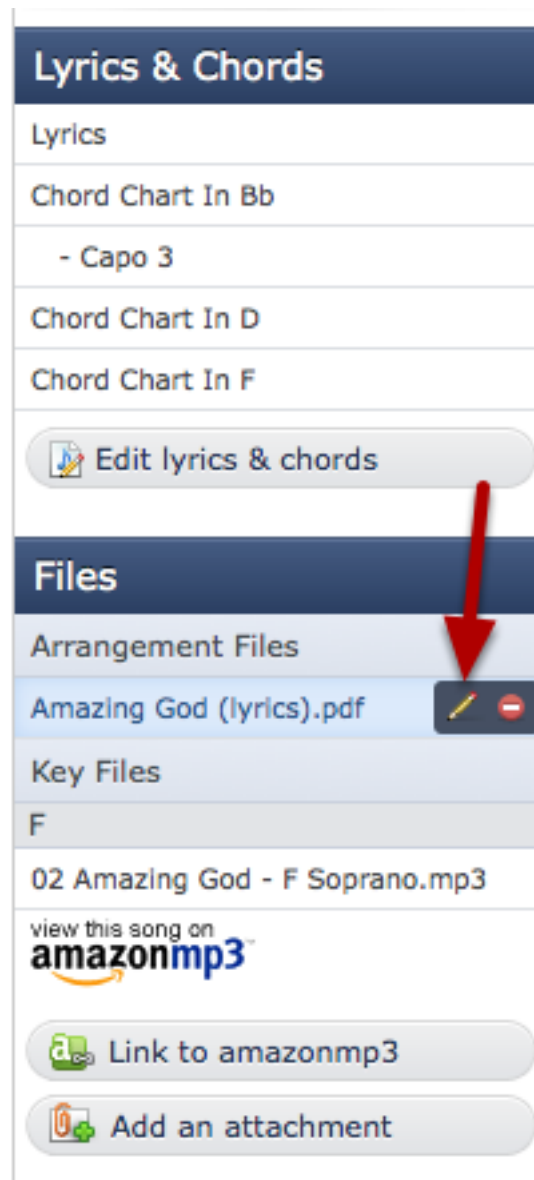
Chord Chart Chord Chart Acoustic

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

<u>title</u>
   Amazing Because it is <i>(Student Arrangement)</i>
   <i>(Southwest Student Arrangement)</i>
   Amazing God <i>(Central Worship)</i>
   Amazing Grace <i>(Central Worship)</i>
   Amazing Grace (My Chains Are Gone) <i>(Chris Tomlin)</i>
   <i>(Central Worship)</i>
   <i>(CR)</i>
   Amazing Love (You Are My King) <i>(CR - VMB)</i>
   Hallelujah (Your Love is Amazing) <i>(Default Arrangement)</i>

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.



The screenshot displays a music management interface with the following sections:

- Lyrics & Chords**: A dark blue header section containing:
 - Lyrics
 - Chord Chart In Bb
 - Capo 3
 - Chord Chart In D
 - Chord Chart In F
 - [Edit lyrics & chords](#) (button with a pencil icon)
- Files**: A dark blue header section containing:
 - Arrangement Files
 - Amazing God (lyrics).pdf** (highlighted in blue, with a pencil icon and a minus sign icon to its right)
 - Key Files
 - F
 - 02 Amazing God - F Soprano.mp3
- amazonmp3**: A section with the text "view this song on" above the "amazonmp3" logo.
- [Link to amazonmp3](#) (button with an Amazon logo icon)
- [Add an attachment](#) (button with a plus icon)

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.

The screenshot shows a 'File Details' window with the following information:

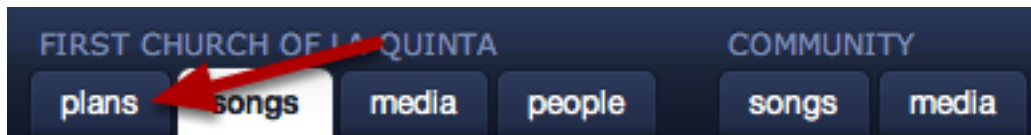
- File Name: Amazing God (lyrics).pdf
- File Size: 56.3 KB
- Created: 12/29/2007 at 02:52 PM
- Attach To: Arrangement
- Attachment Types: Choose:

File Name	Attach To	Attachment Types
<input type="checkbox"/> Chord Chart	<input type="checkbox"/> Chord Chart Acoustic	<input type="checkbox"/> Chords & Lyrics
<input type="checkbox"/> Digital Performer	<input type="checkbox"/> Español	<input type="checkbox"/> Finale
<input checked="" type="checkbox"/> Lyrics	<input type="checkbox"/> MP3 Alto	<input type="checkbox"/> MP3 Soprano
<input type="checkbox"/> MP3 Tenor	<input type="checkbox"/> MusicPad	<input type="checkbox"/> Production
<input type="checkbox"/> Sheet Music Cello	<input type="checkbox"/> Sheet Music Viola	<input type="checkbox"/> Sheet Music Violin 1
<input type="checkbox"/> Sheet Music Violin 2		

A red arrow points to the 'Lyrics' checkbox, which is checked.

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.



First Church Of La Quinta Songs

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

La Quinta/Main Campus 


UPCOMING PLANS [view all plans](#)

- [April 7, 2011](#)
- [April 14, 2011](#)
- [April 21, 2011](#)
- [April 28, 2011](#)
- [May 5, 2011](#)
- [May 12, 2011](#)
- [May 19, 2011](#)
- [May 26, 2011](#)

SERIES TITLE

PLAN TITLE

ATTACHMENTS

-  [Datatabase Backup.zip](#)

[+ create a new plan](#) [↶ matrix](#) [↷](#)

Then select Enabled from the drop down

Edit Service

Service Title

Folder

Frequency

Attachment types

Enabled
 Disabled

Comment permissions

Load the matrix with previous and next plans.

Accept

[cancel](#)

Go into one of the plans that you are working on

La Quinta/Main Campus

UPCOMING PLANS [view all plans](#)

SERIES TITLE

PLAN TITLE

[March 31, 2011](#)

[April 7, 2011](#)

[April 14, 2011](#)

[April 21, 2011](#)

[April 28, 2011](#)

[May 5, 2011](#)

[May 12, 2011](#)

[May 19, 2011](#)

[May 26, 2011](#)

matrix

copy
delete

ATTACHMENTS

[+ create a new plan](#) [↻ matrix](#)

[Datatabase Backup.zip](#)

[Add an attachment](#)

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

The screenshot shows a sidebar titled "People" with a gear icon in the top right corner. A red arrow points to the gear icon. Below the title, there are several expandable sections, each with a "send" button and a status indicator (green, red, or yellow circles with numbers):

- ▶ Audio/Visual 11AM: send (0 green, 0 red, 2 yellow)
- ▶ Audio/Visual 9AM: send (0 green, 0 red, 3 yellow)
- ▶ Choir: send (9 green, 0 red, 0 yellow)
- ▶ Instruments Played: send (0 green, 0 red, 7 yellow)
- ▶ Tech 11AM: send (0 green, 0 red, 1 yellow)
- ▶ Vocals: send (5 green, 0 red, 0 yellow)

At the bottom of the sidebar, there are four buttons: "Schedule a person", "Email these people", "Needed positions", and "Stage layout".

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

Manage People Categories & Positions

- Audio/Visual 11AM
- Audio/Visual 9AM
- Band 11AM
- Choir
- Instruments Played
- Tech 9AM
- Tech 11AM
- Vocals

Alto	Choir	Soprano	
Tenor	Worship Leader	 	add position

[+ add new category](#) [📄 copy a category](#) [✖ close](#)

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

Edit Position

Name:

Service: La Quinta/Main Campus Category: Vocals

Criteria You currently have 1 people selected for this position.

Custom Properties	Instruments Played options	Selected Options
Instruments Played	Any	Leaders
Vocals	Acoustic Guitar	Worship Leader
Tech	Bass Guitar	
Leaders	Drums	
1st/3rd Week Band	Electric Guitar	
2nd/4th Week Band	Keys	
Campuses	Organ	

Attachment Types:

Chord Chart Chord Chart Acoustic **Lead Guitar** MP3 Alto

MP3 Soprano MP3 Tenor

[cancel](#)

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

Setting Up Your Songs Page

Songs Page: Add A Song


planssongsmediapeoplesongsmedia

MCT Church of Christ Songs

Has Audio File(s) Has PDF(s) Has DOC(s) reports + [add a song](#)

You currently do not have any songs in your song library.
You can add your own songs or search our song database by clicking "[Add a Song](#)".

<u>Title</u>	<u>B.P.M.</u>	<u>Key</u>	<u>Last Scheduled</u>
--------------	---------------	------------	-----------------------



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

New Song

CCLI # or Title **Mighty to Sav** ①

Type

② Chorus

Mighty To Save 2397122
by Colin Buchanan

Mighty To Save 4591782
by Ben Fielding and Reuben Morgan

Arrangement Information

 ③

Name	Length	BPM
Default Arrangement	0 mins 0 secs	

Speed

Style

Starting Key ④ Major Ending Key Major

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

arrangement names. If your arrangement is by a certain artist, you can title your arrangement 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 Properties, like Speed and Style.

- 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

Mighty To Save

Song Information

CCLI #: **Title:**

Themes:

Notes:

Custom Properties

Focus 3

God-focused

Type

Chorus

assign new property:

Community Song Information

Title: Mighty To Save

Authors: Ben Fielding and Reuben Morgan

Copyright: 2006 Hillsong Publishing

Administration: Integrity Music, Inc.

Themes: Anger, Baptism, beautiful, Communion, Compassion, Easter, Evangelism, Faithful, Forgiveness, god you reing, Help, his love, Holy Spirit, Hope, Joy, kingdom, kingdom od god, Love, Marriage, mighty to save, Missions, New, returning to god, Salvation, Sing to the King, stronger, The Lord is gracious and compassionate, The Standj, the tonque, Trust, and Word

Arrangements

[Christmas 2009](#)

0:30 D

[Hillsong United](#)

5:00 A, G

[Spanish](#)

5:00 A

[+ add an arrangement](#)

Your individual song page will look similar to this.

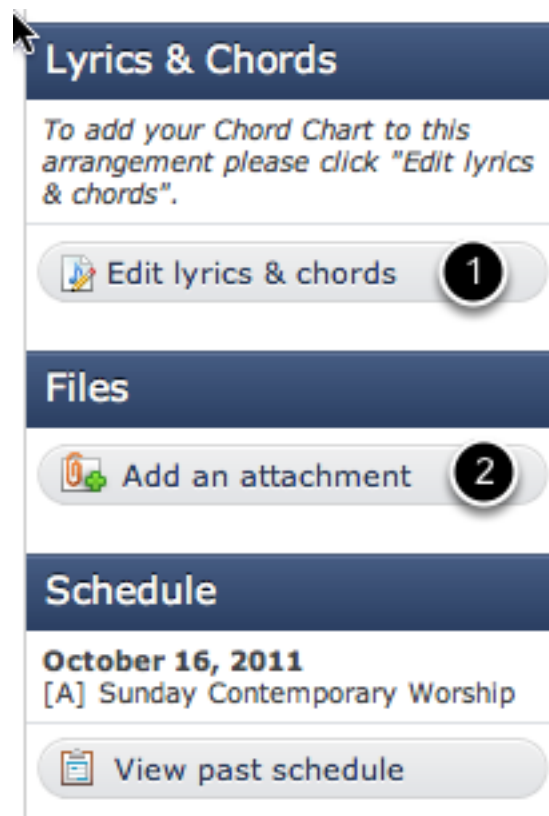
- The basic song information is editable and can then be used to help you [search and filter](#) your

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

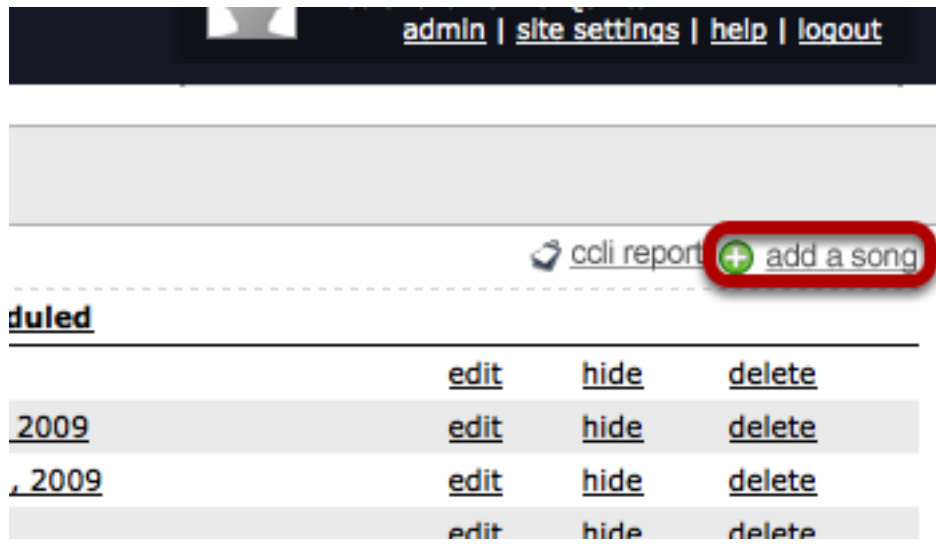


After clicking on an arrangement name, add files, lyrics or chords.

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"



The screenshot shows a web interface with a dark navigation bar at the top containing links for [admin](#), [site settings](#), [help](#), and [logout](#). Below this is a light gray header area. In the main content area, there is a link for [cli report](#) and a button labeled [+ add a song](#), which is highlighted with a red circle. Below a dashed line, there is a table with the following structure:

<u>cheduled</u>	edit	hide	delete
2009	edit	hide	delete
, 2009	edit	hide	delete
	edit	hide	delete

Enter CCLI number or Song Title

New Song

CCLI # or Title



Type

Chorus

Hymn

Instrumental

Special

Arrangement Information

Name

Length

mins

secs

BPM

Speed

Style

Starting Key

Major

Ending Key

Major

Accept

[cancel](#)

Select song from list

New Song

CCLI # or Title

Type

Chorus

Arrangement Information

Name

Speed

Style

Starting Key

Desert Song <i>by Brooke Fraser</i>	#5060793
Desire <i>by Pete Kiple and Philip Wickham</i>	#5105191
Desire <i>by Scott Flaten</i>	#5453300
Desired Of All The Nations <i>by David Moffitt, Michael Hurst, and Sue C. Smith</i>	#4795849
Desperate <i>by Dawn Richardson, Glenn Drennen, Justin Cox, Phillip Shorb, Rob Hawkins, and Wendy Drennen</i>	#5628836
Desperate <i>by Ben Smith, Christian Paschall, and Joseph Pat Barrett</i>	#5638242
Desperate For You <i>by Martin Chalk</i>	#3804418
Desperate Man <i>by Alan Shacklock and Paul Q-Pek</i>	#2197140
Desperate People <i>by Joel Houston and Michael Guy Chislett</i>	#4785794
Desperately <i>by B. J. Davis</i>	#4091622
Desperation <i>by Glenn Packiam and Jon Egan</i>	#4084646

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

Desert Song

Song Information

CCLI #:

5060793

Title:

Desert Song

Custom Pro

assign new pr

Themes:

5507079, Dependence on God, Desire, jpbe, Prayer, Providence, This is How We Know, Victory, you

Notes:

Save

Save & Close

Community Song Information

Title: [Desert Song](#)

Authors: [Brooke Fraser](#)

Copyright: 2008 [Hillsong Publishing](#)

Administration: [Integrity Music, Inc.](#)

Themes: [5507079](#), [Dependence on God](#), [Desire](#), [jpbe](#), [Prayer](#), [Providence](#), [This is How We Know](#), [Victory](#), and [you never](#)

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.

New Song

CCLI # or Title 1

Type

Chorus Christmas Future Songs Instrumental

Spanish Special Test

Arrangement Information

Name	Length	BPM
<input data-bbox="220 877 1019 930" type="text" value="Default Arrangement"/>	<input data-bbox="1045 877 1149 930" type="text" value="0"/> mins <input data-bbox="1166 877 1269 930" type="text" value="0"/> secs	<input data-bbox="1305 877 1390 930" type="text"/>

Speed

Style

Starting Key Major Ending Key Major

2 [cancel](#)

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

Everywhere You Are

Song Information

CCLI #:

Title:

Everywhere You Are

Author:

Copyright:

Administrator:

Themes:

Notes:

Save

Save & Close

Arrangements

[Default Arrangement](#)

0:00

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.

Central Christian Church Songs

Has Audio File(s) Has PDF(s) Has DOC(s)

reports csv export add a song

You are filtering your songs to the songs that have a **song name** like 'how'. To clear this filter click here.

Title	B.P.M.	Key	Last Scheduled	
How Can I Keep From Singing (Chris Tomlin)	208	Bb	July 6, 2007	edit hide delete
How Good And Pleasant (Tommy Walker - Short)	98	E	March 4 & 5, 2006	edit hide delete
How Great Is Our God (Central Worship)	76	A, B	May 5, 2011	edit hide delete
(Chris Tomlin - Live)	71	C, Ab		
(Student Arrangement)				
How Great Thou Art (Passion)	80	B	July 20, 2008	edit hide delete
How Great You Are (Sean Killingsworth)	76	G, C, F#	June 19, 2011	edit hide delete
How He Loves (Student Arrangement)		C, A	June 26, 2011	edit hide delete
(Student Arrangement)		A-A		
(David Crowder Band)	155	C		

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 skip to the arrangement page.)

Click on 'add an arrangement'.

Community Song Information

Title: How Great Is Our God

Authors: Ed Cash, Jesse Reeves, and Chris Tomlin

Copyright: 2004 worshiptogether.com songs, sixsteps Music, and Alletrop Music

Administration: EMI Christian Music Publishing and Music Services, Inc.

Themes: community, Faith, God's Attributes, God's Word, Holiness, How Great Is Our God, i ll fly away, in christ alone, Kingship, Majesty, Praise, Purpose, Surrender, Worthiness, and you are good

Arrangements

add an arrangement

[Central Worship](#)

4:00

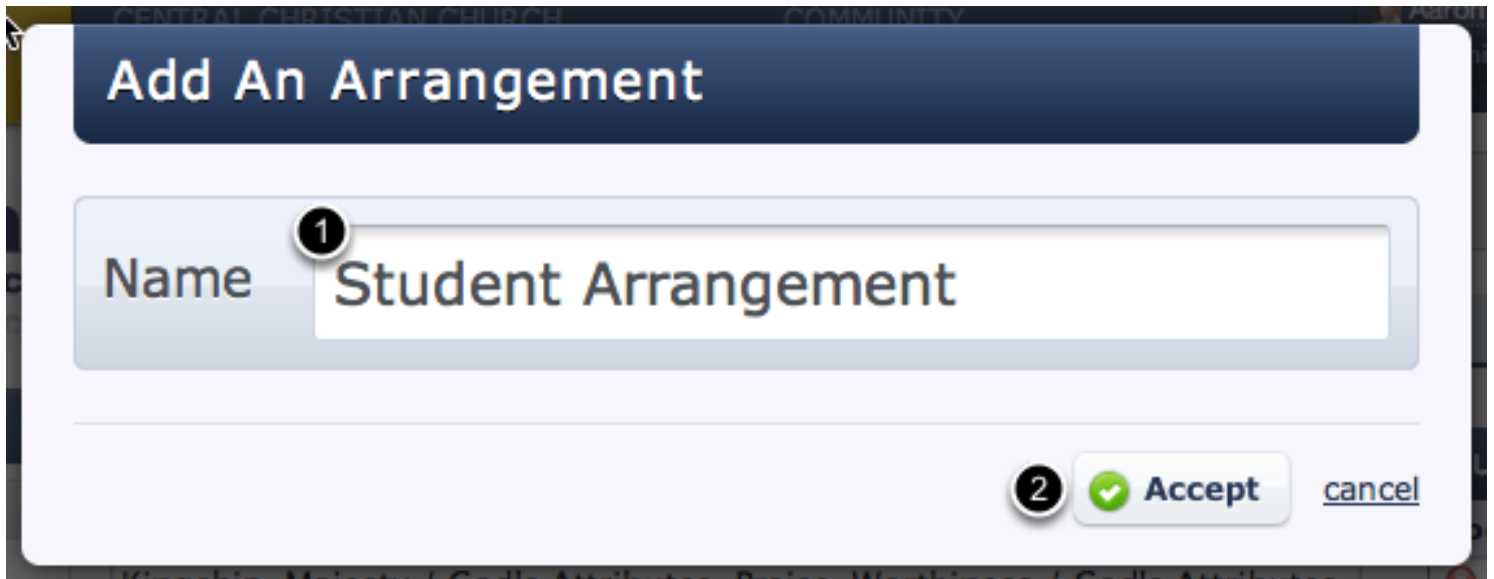
A, B

[Chris Tomlin - Live](#)

4:00


Ab, C

Title your Arrangement, click Accept.



Add An Arrangement

Name **1** Student Arrangement

2  **Accept** [cancel](#)

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.



Arrangements  [add an arrangement](#)

Central Worship 4:00 A, B	Chris Tomlin - Live 4:00 Ab, C	Student Arrangement 0:00
---	--	---

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

central christian church

How Great Is Our God > Student Arrangement

Arrangement Information

Title: Student Arrangement **BPM:** 3 **Length:** 0 mins 0 secs

Notes:

Custom Properties
assign new property:
browse all

Files

Arrangement Files

How Great Is Our God.doc
How Great Is Our God A .doc

Add an attachment

Schedule

January 14, 2010
Surge

View past schedule

Sequence:

Verse
Chorus
Bridge
PreChorus
Instrumental
Intro
Outro
Vamp
Tag
Breakdown

Save Save & Close

Keys

add a key

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 arrangements 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 transpose mp3s and Chord Charts you enter into the Lyrics & Chords box to any keys you add.

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

🕒 May 5, 2011 +

No series title set - [click here to change](#)

Elder Retreat Thursday

Length in mins	
4	🎵 Glory To God Forever [B]
5:45	🎵 The Stand [A]
5:30	🎵 Our God [G]
5	🎵 Mighty To Save [A]
+	4 How Great Is Our God [A]    
24:15	

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'

central christian church

How Great Is Our God > Central Worship

Arrangement Information

Title: Central Worship **BPM:** 76 **Length:** 4:00
mins secs

Notes:

Sequence:

- Verse
- Chorus
- Bridge
- PreChorus
- Instrumental
- Intro
- Outro
- Vamp
- Tag
- Breakdown

Save Save & Close

Keys

Original B

+ add a key

Custom Properties

Lead Vocal

- Male-high
- Male-low

Speed

- 4. Medium Slow

Style

- 1. Rock

assign new property:

browse all

(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

Editing Key

Starting **1**

Ab Major

Ending

Major

Description Female Key **2**

Alternate Keys (Capos)

Capo1 **3** G -

+ add an alternate key

Accept cancel

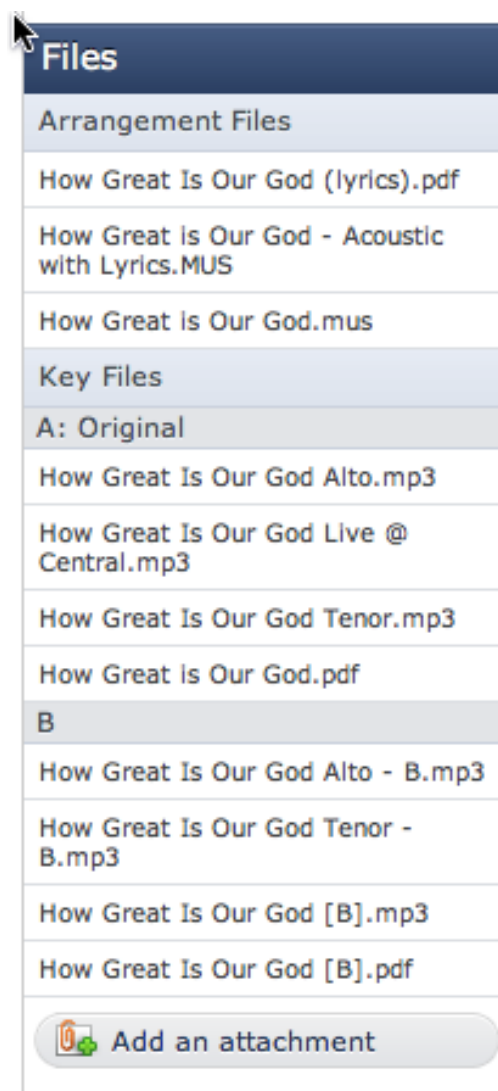
1. If your song starts in one key and ends in another, choose an ending key so you can see what key the song ends in when planning your services. If your song stays in the same key, leave the ending key blank.
2. If you want to differentiate your keys, enter a description. This can help you remember 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 available 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

First Church Of La Quinta Songs

 Has Audio File(s)  Has PDF(s)  Has DOC(s)

Title

  	'Til I See You <i>(Default Arrangement)</i>
  	'Til I See You <i>(Central Worship)</i>
  	A Beautiful Collision <i>(Default Arrangement)</i>
  	A Jesus Song <i>(Default Arrangement)</i>
  	Above All <i>(Default Arrangement)</i>
  	<i>(High School Service)</i>
  	Agnus Dei <i>(Default Arrangement)</i>
  	All Creatures Of Our God And King <i>(Default Arrangement)</i>
  	Already Mine <i>(Default Arrangement)</i>
  	Amazing God <i>(Central Worship)</i>
  	Ancient Of Days <i>(Default Arrangement)</i>
  	As The Deer <i>(Default Arrangement)</i>
  	At The Foot Of The Cross <i>(Default Arrangement)</i>
  	Awesome God <i>(Default Arrangement)</i>

(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

The screenshot shows the 'planning center' interface for Central Christian Church. The top navigation bar includes 'plans', 'songs', 'media', 'people', and 'so'. The main content area is titled 'Amazing God > New' and contains an 'Arrangement Information' section with fields for 'Title:' (containing 'Central Worship'), 'Notes:', and 'Sequence:'. The 'Sequence:' field has 'Verse' and 'Chorus' options. On the left sidebar, the 'Files' section contains an 'Add an attachment' button, which is highlighted with a red arrow.

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.

First Church Of La Quinta Songs

Has Audio File(s) Has PDF(s) Has DOC(s)

Title



  	'Til I See You <i>(Default Arrangement)</i>
  	'Til I See You <i>(Central Worship)</i>
  	A Beautiful Collision <i>(Default Arrangement)</i>
  	A Jesus Song <i>(Default Arrangement)</i>
  	Above All <i>(Default Arrangement)</i>
  	<i>(High School Service)</i>
  	Agnus Dei <i>(Default Arrangement)</i>
  	All Creatures Of Our God And King <i>(Default Arrangement)</i>
  	Already Mine <i>(Default Arrangement)</i>
  	Amazing God <i>(Central Worship)</i>
  	<i>(Default Arrangement)</i>
  	Ancient Of Days <i>(Default Arrangement)</i>

Hover over the attachment and click the pencil.



Files

Arrangement Files

- 02 Amazing God - F Soprano.mp3
- Amazing God (lyrics).pdf**  

Key Files

D

- 02 Amazing God - F Soprano - D.mp3

F

- 02 Amazing God.mp3
- Amazing God 2 Tenor - F.mp3
- Amazing God [F] Capo 1[E].pdf

Choose where file should be attached to.

File Details

File Size: 56.3 KB | Created At 06/10/2009 at 11:42 AM

File Name	Attach To	Attachment Types
Amazing God (lyrics).pdf	<ul style="list-style-type: none">Song✓ ArrangementKey [A]Key [D]Key [F]	Choose: <input type="text"/>
<input type="checkbox"/> Chord Chart	<input checked="" type="checkbox"/>	<input type="checkbox"/> Lead Guitar
<input type="checkbox"/> MP3 Alto	<input type="checkbox"/> MP3 Soprano	<input type="checkbox"/> MP3 Tenor

Action	Person	When Occurred
View	iPhone Tester	9/24/2010
View	iPhone Tester	9/9/2010
View	iPhone Tester	9/1/2010
View	iPhone Tester	8/30/2010
View	iPhone Tester	8/28/2010
View	iPhone Tester	8/28/2010
View	iPhone Tester 2	8/28/2010

[delete](#) ✔ Accept [cancel](#)

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

First Church Of La Quinta Songs

Has Audio File(s) Has PDF(s) Has DOC(s)

Title
   'Til I See You (Default Arrangement)
   'Til I See You (Central Worship)
   A Beautiful Collision (Default Arrangement)
   A Jesus Song (Default Arrangement)
   Above All (Default Arrangement)
   (High School Service)
   Agnus Dei (Default Arrangement)
   All Creatures Of Our God And King (Default Arrangement)
   Already Mine (Default Arrangement)
   Amazing God (Central Worship)
   Ancient Of Days (Default Arrangement)
   As The Deer (Default Arrangement)
   At The Foot Of The Cross (Default Arrangement)
   Awesome God (Default Arrangement)
   Be Thou My Vision (Default Arrangement)

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

The screenshot shows the 'Add keys' interface for the song 'Amazing God - Central worship'. The interface is divided into several sections:

- Arrangement Information:** Contains fields for Title (Central Worship), BPM, and Length (0:00). A Notes field is also present.
- Custom Properties:** A section for assigning new properties, with a 'browse all' button.
- Keys:** A section where keys are added. Two keys, 'D' and 'F', are currently listed. A red box highlights this section.
- Buttons:** 'Save' and 'Save & Close' buttons are located below the Notes field.
- add a key:** A green plus icon and the text 'add a key' are located at the bottom right of the Keys section.

A red arrow points from the 'Custom Properties' section towards the 'add a key' button.

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.

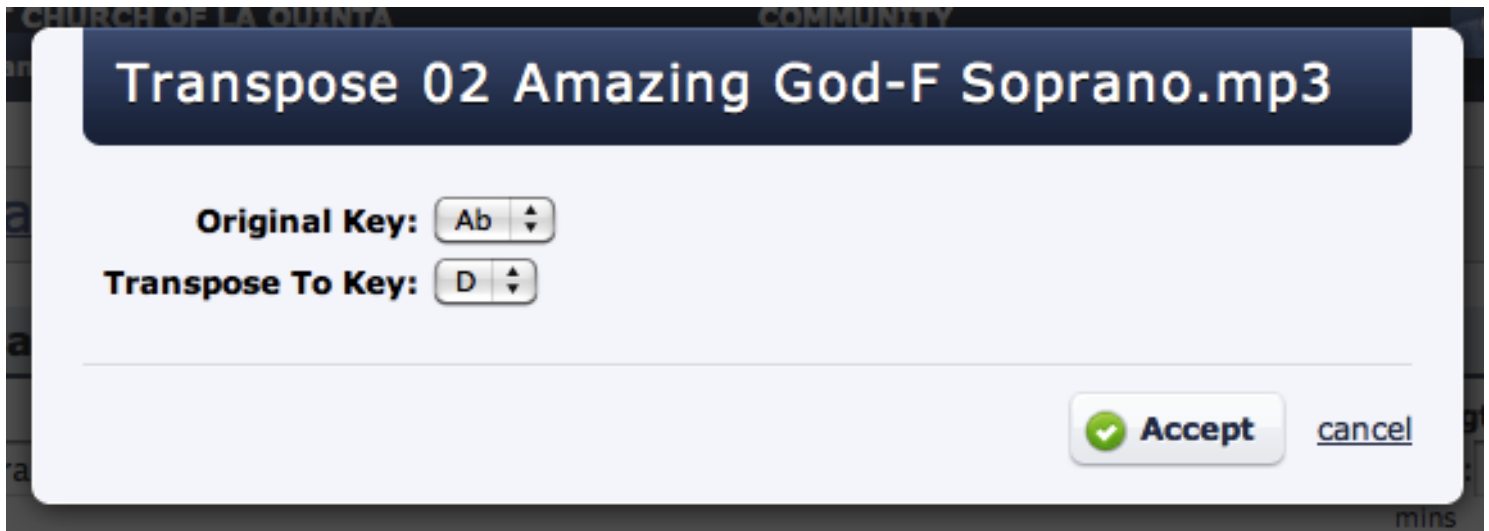
The screenshot shows a 'Files' list with the following items:

- Arrangement Files
- Amazing God (lyrics).pdf
- Key Files
- F
- 02 Amazing God - F Soprano.mp3

A red arrow points to the '02 Amazing God - F Soprano.mp3' file, which has a blue up/down icon next to it. Below the file name is a small 'amazonmp3' logo.

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

Key Files
D
<i>Transposing: 02 Amazing God - F Soprano - D.mp3</i>
F
02 Amazing God.mp3
Amazing God 2 Tenor - F.mp3
Amazing God [E] Capp 1[E] pdf

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











































FIRST CHURCH OF LA QUINTA COMMUNITY

plans songs media people songs media

First Church Of La Quinta Songs

Has Audio File(s) Has PDF(s) Has DOC(s)

< Previous 1 2 Next > all

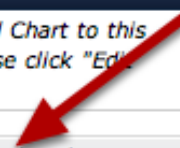
Title	B.P.M.	Key
   A Beautiful Collision (Default Arrangement)		A, Eb
<i>(High School)</i>		
   A Mighty Fortress Is Our God (Default Arrangement)		C
   Above All (Default Arrangement)		
   Agnus Dei (Default Arrangement)		A-A,
   All Creatures Of Our God And King (Default Arrangement)		
   All Hail The Power Of Jesus' Name (Default Arrangement)		Db
   Already Mine (Default Arrangement)		
   Amazing God (Central Worship)		D, F,
<i>(Default Arrangement)</i>		B
   Ancient Of Days (Default Arrangement)		Ab, C
   arise and shine (Default Arrangement)		
   As The Deer] (Default Arrangement)		A, C
   At The Foot Of The Cross (Default Arrangement)		G, A
   Awesome God (Default Arrangement)		
   Be Thou My Vision (Default Arrangement)		G
<i>(Youth Band Version)</i>		

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'

Lyrics & Chords

To add your Chord Chart to this arrangement please click "Edit Chord Chart".

  Edit lyrics & chords

Copy/Paste your chord chart into the text box.

Edit Lyrics & Chords

Font Font Size Original Key Columns

[VERSE]
[G]Great are You, Lord, Mighty in [Dsus]strength
[C2]You are faithful, You will ever [G]be
[G]We will praise You, all of our [Dsus]days
[C2]It's for Your glory, we offer every[G5/E]thing [G5/F#]

PAGE_BREAK

[CHORUS]
 G G/F#
Raise your hands all you nations, shout to God all Creation
 G/E C2
How awesome is the Lord, most high
 G G/F#
We will praise You together, from now and forever
 G/E C2
How awesome is the Lord, most High

LINE PREVIEW

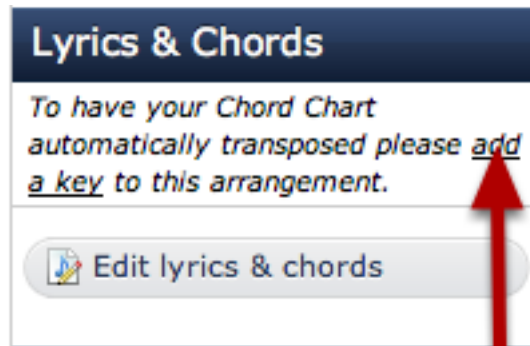
G	Dsus
We will praise You, all of our days	

Enable Lyrics PDF [cancel](#)

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.

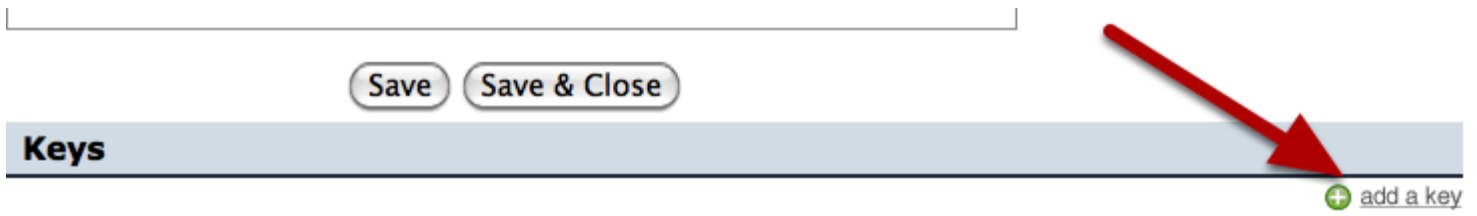
To create a separate PDF with just the lyrics, click "Enable Lyrics PDF" in the lower left.

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).



[Privacy Policy](#) | [Terms Of Service](#) | Copyright ©2006-2009 Ministry Centered Technologies, Inc. | [Contact Us](#)

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

Enter key information

Add A Key

Starting Ending

Description

Alternate Keys (Capos)

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'.

Editing Key

Starting Ending

Description

Alternate Keys (*Capos*)

[+ add an alternate key](#)

[cancel](#)

After you click "add an alternate key", you will have to specify what that key is for. And choose the 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.

The screenshot shows a music management interface. On the left, there are three main sections: "Lyrics & Chords", "Files", and "Schedule".

- Lyrics & Chords:** A red box highlights the "Chord Chart In Db" section, which lists "- Capo1" and "- Capo4". Below it is a button labeled "Edit lyrics & chords".
- Files:** Includes a "view this song on amazonmp3" link and three options: "link to amazonmp3", "link to an attachment", and "upload an attachment".
- Schedule:** Shows "October 11, 2009 [Db]" and "FUSE | High School", with a "view past schedule" link.

On the right side, there are three input fields:

- Title:** "High School Arrangement"
- Notes:** (Empty)
- Sequence:** (Empty)

At the bottom right, a "Keys" section is visible, showing a dropdown menu with "Db" selected. A red "x" icon is in the top right corner of the "Db" key selection box. A red arrow points from the "Chord Chart In Db" box to the "Keys" section.

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 & *Italics* 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:

File Details

File Name:

Attach To:

Allow Download:

File Size: 5.3 MB

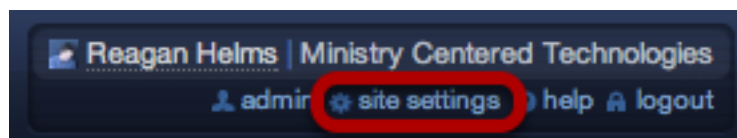
Created At: 09/21/2010 at 01:17 PM

Action	Person	When Occurred
Upload	Katie Willard	9/21/2010

[delete](#) [cancel](#)

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

Settings Navigation

- Summary
- PCO Settings**
- Package Options
- Billing Options
- Attachment Types

Site Settings

Account Summary

Organization Information

Your logo. Please select a jpg, png or gif 182 pixels wide.

MCT Church of Christ
Member since October, 29, 2009 [\[cancel this account\]](#)

Choose File no file selected **Upload**

Site Ownership

Primary Owner
Katie Willard

Alternate Owner

Use this dialog to search your people.

Disable Music Stand

By enabling Music Stand you will be charged **\$10.00 a month** above your current plan's cost.

Then set MP3 setting.

Site Settings

My Planning Center Settings

General Settings

Calendar Starts On:
Sunday

Default User Permissions:
Scheduled Viewer

Block Viewers From Viewing People:
False

Block Schedulers From Editing People:
False

MP3 Settings

Default Setting For All MP3 Downloads:
False

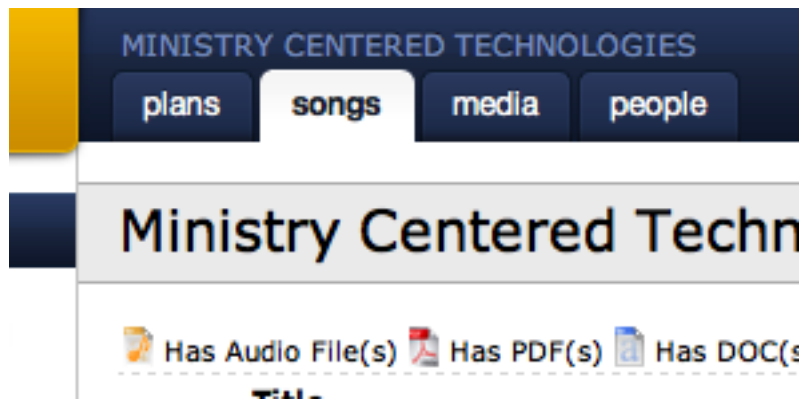
CCLI Settings

CCLI Number:
No CCLI number provided

CCLI Reporting:
Disable CCLI Reporting

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.

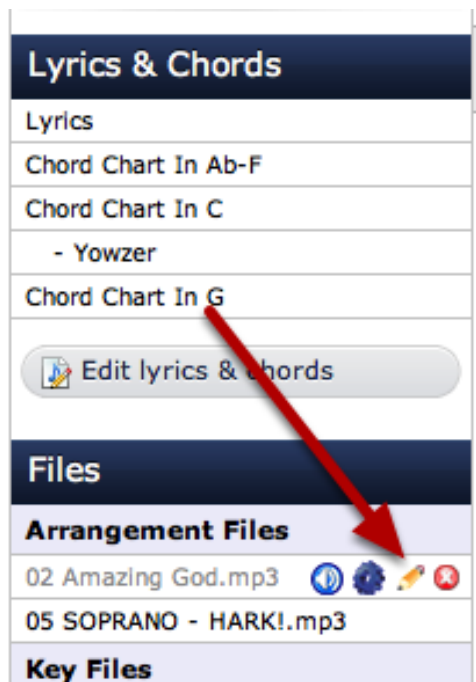
To Change Individual Setting, go to the Songs page.



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.

File Details

File Name: 02 Everywhere That I Go.mp3

Attach To: Arrangement

Allow Download: False

File Size: 5.3 MB

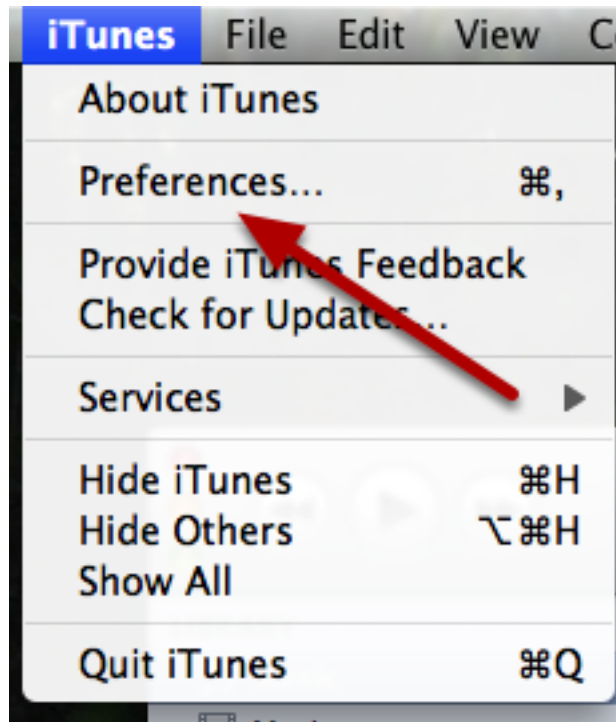
Created At: 09/21/2010 at 01:17 PM

Action	Person	When Occurred
Download	Reagan Helms	9/28/2010
Upload	Katie Willard	9/21/2010

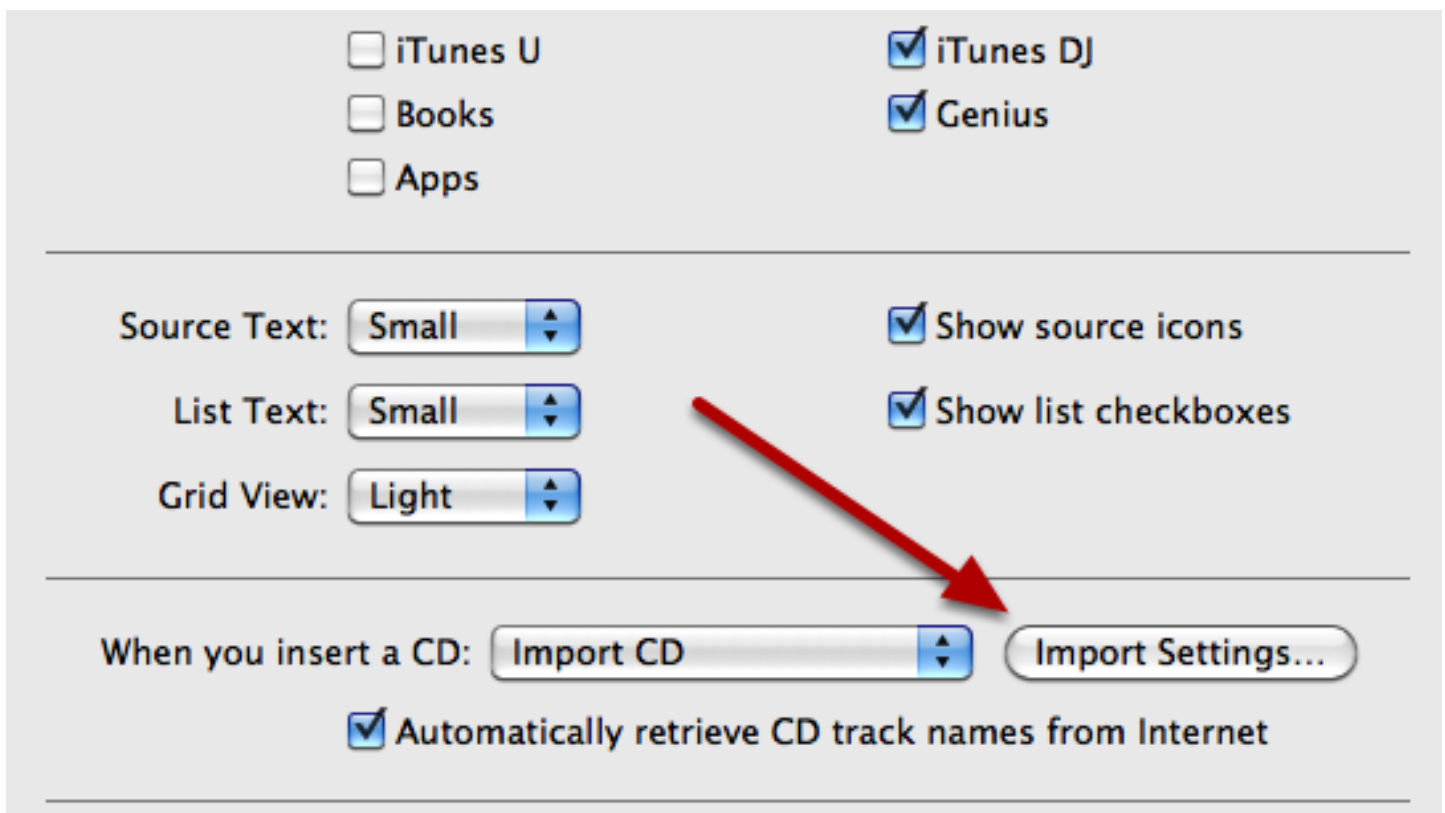
[delete](#) [cancel](#)

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

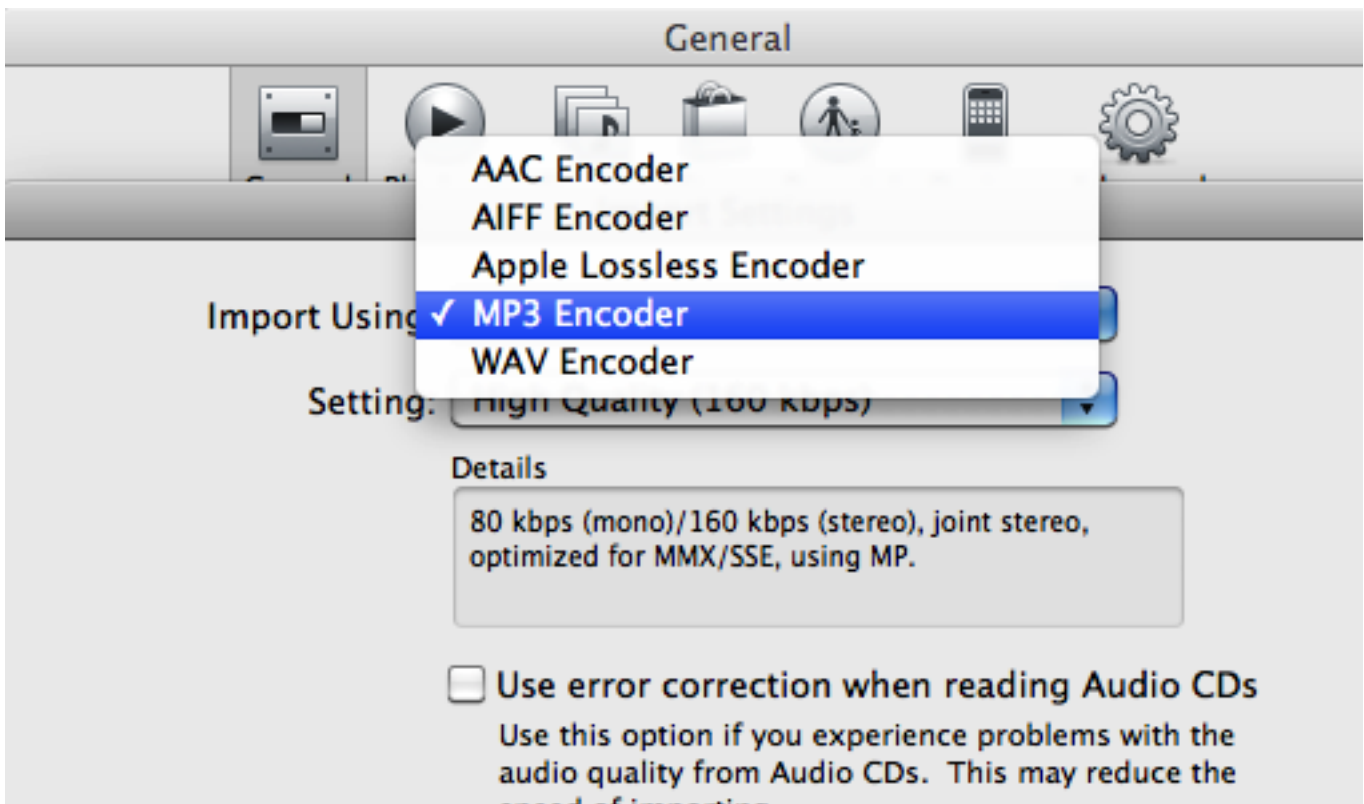
How to Convert to Mp3 Files in iTunes



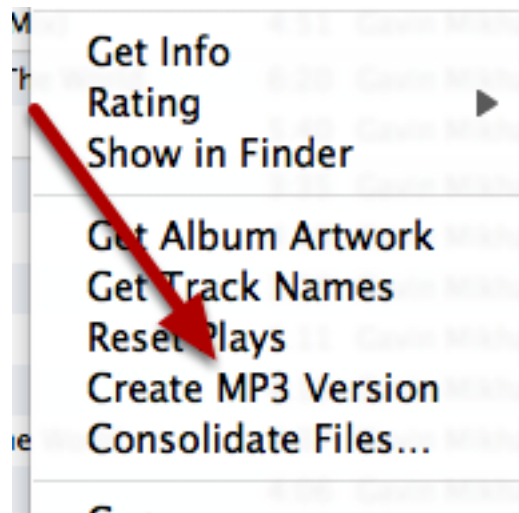
Go to "Preferences" under the iTunes menu



Then Click on "Import Settings"



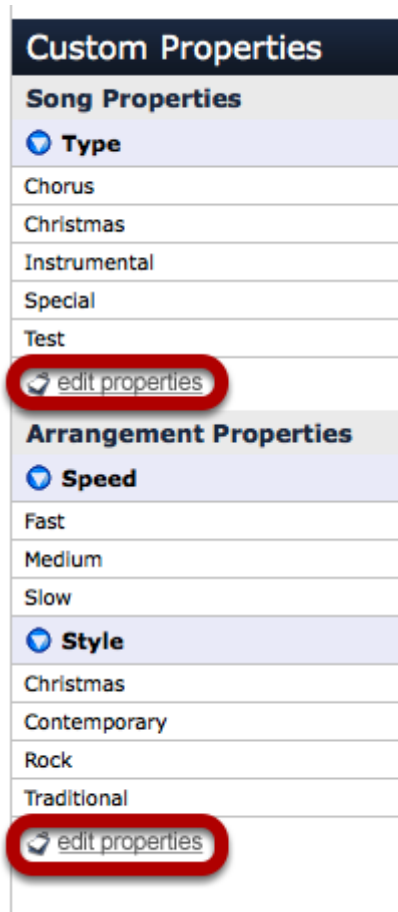
Select "MP3 Encoder", this will import all of your future files into an MP3 format, and give you the following option



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

Song Custom Properties

Two types of Custom Properties for songs:



The screenshot displays a vertical menu titled "Custom Properties". It is divided into two main sections: "Song Properties" and "Arrangement Properties".

- Song Properties:** This section is currently selected and highlighted in light blue. It includes a sub-section "Type" (also highlighted) with a list of options: Chorus, Christmas, Instrumental, Special, and Test. Below this list is a button labeled "edit properties" with a pencil icon, which is circled in red.
- Arrangement Properties:** This section is currently unselected. It includes a sub-section "Speed" (highlighted) with options: Fast, Medium, and Slow. Below that is a sub-section "Style" (highlighted) with options: Christmas, Contemporary, Rock, and Traditional. At the bottom of this section is another "edit properties" button with a pencil icon, also circled in red.

On the right side of the menu, there is a vertical scroll bar with several orange arrows indicating scrollable content.

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

Add A Property

Name:

Ministry Folder:

Multiple Selections

Add New Property

Arrangement Custom Properties

Speed

Fast Medium Slow

Style

Christmas Contemporary Rock

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.

Custom Properties

assign new property:

Speed:

- + Fast
- + Medium
- + Slow

Style:

- + Christmas
- + Contemporary
- + Rock
- + Traditional

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.




The image shows a 'Custom Properties' menu with two main sections: 'Song Properties' and 'Arrangement Properties'. Under 'Song Properties', the 'Type' section is expanded, showing options like Chorus, Christmas, Instrumental, Special, and Test. Under 'Arrangement Properties', the 'Speed' section is expanded, showing Fast, Medium, and Slow. The 'Style' section is also expanded, and the 'Christmas' option is highlighted with a red circle. To the right of the menu is a vertical column of small, light-colored icons.

Custom Properties	
Song Properties	
Type	
Chorus	
Christmas	
Instrumental	
Special	
Test	
edit properties	
Arrangement Properties	
Speed	
Fast	
Medium	
Slow	
Style	
Christmas	
Contemporary	
Rock	
Traditional	
edit properties	










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

Your list is generated.

First Church Of La Quinta Songs

 Has Audio File(s)  Has PDF(s)  Has DOC(s)

You are filtering your songs to the songs that have **Arrangement Style** property of **Christmas**. [To clear this filter click here.](#)

<u>Title</u>	<u>B.P.M.</u>	<u>Key</u>	<u>!</u>
   Hark The Herald Angels Sing <i>(Default Arrangement)</i>		G	
   O Come All Ye Faithful <i>(Default Arrangement)</i>		G	
   O Come O Come Emmanuel <i>(Default Arrangement)</i>		Em	

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:

Filter

Service: 1

Song Title: 2

Arrangement Title: 3

Beats Per Minute: 4 -

Key Name: 5

Starting Key: Major 6

Ending Key: Major 6

Themes: 7

Lyrics: 8

Show 9 len Songs

Apply Filter

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.

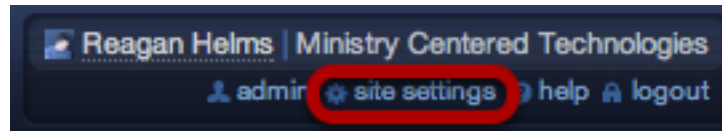
8- Filter by Lyrics

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.

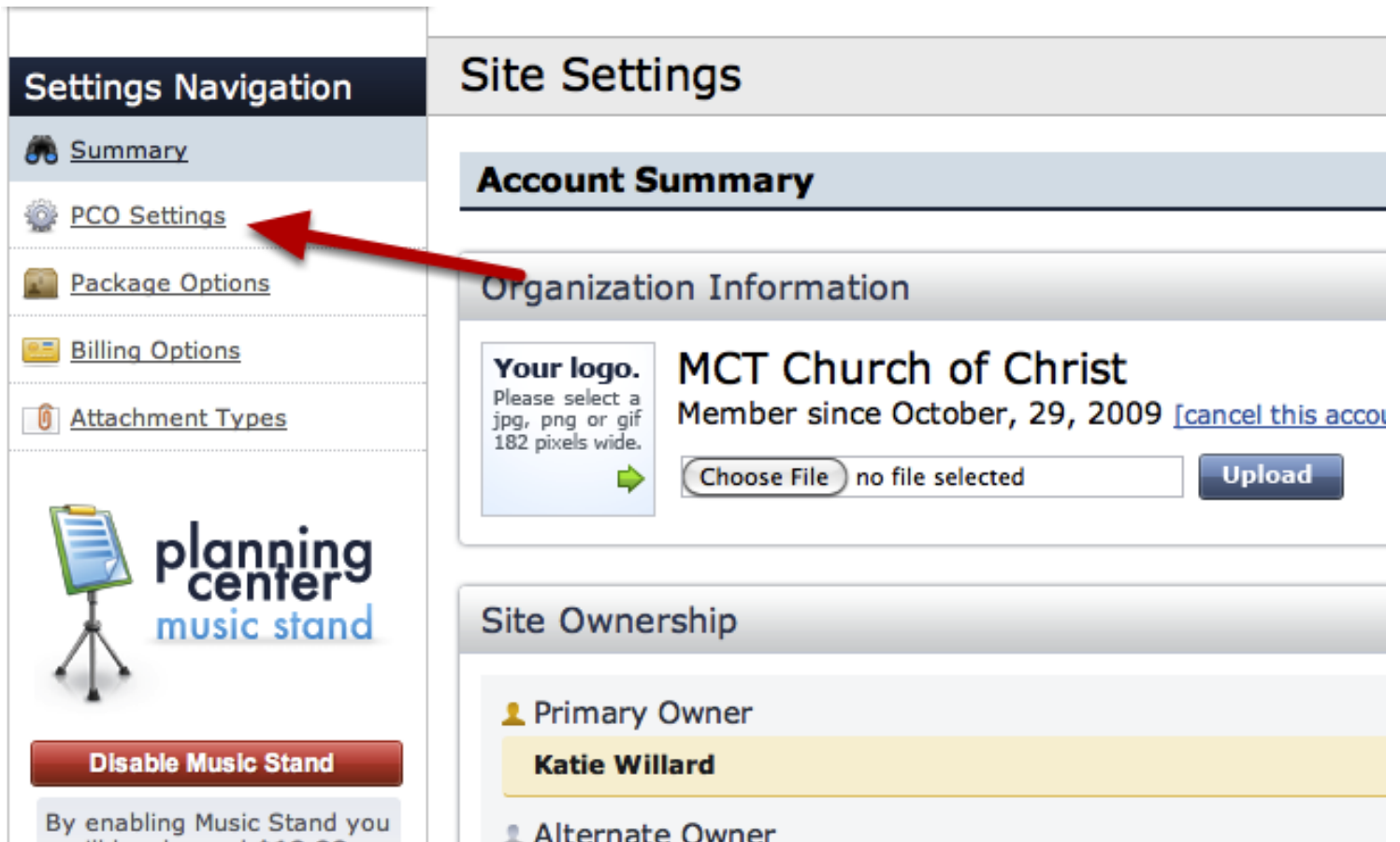
CCLI Reporting

Go to Site Settings.



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

Click on 'PCO Settings' on the left

A screenshot of the 'Site Settings' page. On the left is a 'Settings Navigation' sidebar with options: Summary, PCO Settings, Package Options, Billing Options, and Attachment Types. A red arrow points from 'PCO Settings' in the sidebar to the main content area. The main content area is titled 'Site Settings' and contains an 'Account Summary' section. Under 'Organization Information', there is a logo upload section for 'MCT Church of Christ', which is a member since October 29, 2009. Below this is a 'Site Ownership' section with a 'Primary Owner' listed as 'Katie Willard' and an 'Alternate Owner' section below it. At the bottom of the sidebar, there is a 'Disable Music Stand' button and a note about enabling the music stand.

Click on 'Enable CCLI Reporting' on the right.

General Settings

Calendar Starts On:

Monday

Default User Permissions:

Scheduled Viewer

Block Viewers From Viewing
Example:

None

Block Schedulers From Editing
Example:

None

MP3 Settings

Default Setting For Allow MP3
Downloads:

False

CCLI Settings

CCLI Number:

No CCLI number provided

CCLI Reporting:

Enable CCLI Reporting

Now, when adding a song, options will appear.

Add An Item [\[convert to header\]](#)

4 : 10 min sec

Description:

Audio/Visual Notes: Band Notes:

Person Notes: Vocals Notes:

CCLI Reporting:

<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Single Print	Print Collected	Projection Master	Custom Arrangement	Recording

** Please remember that you are reporting copies not usage.*

Linked Song

'Til I See You
by Gillies, Jadwin \ Houston, Joel

[Change Song](#) [Remove Song](#)

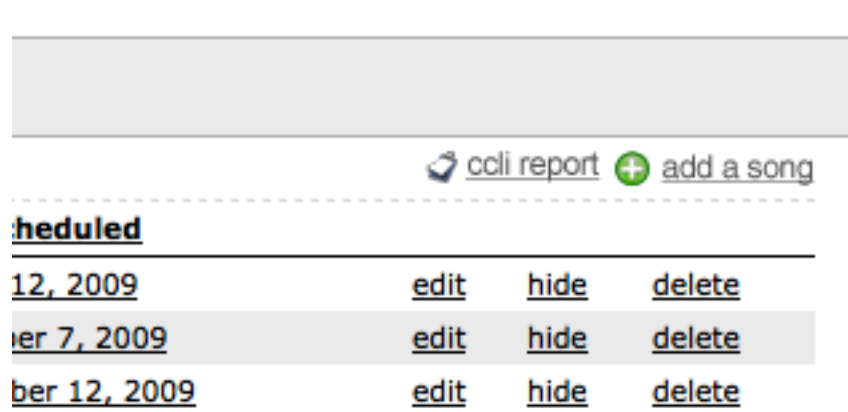
Linked Media

[Add Media](#)

[Accept](#) [cancel](#)

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.

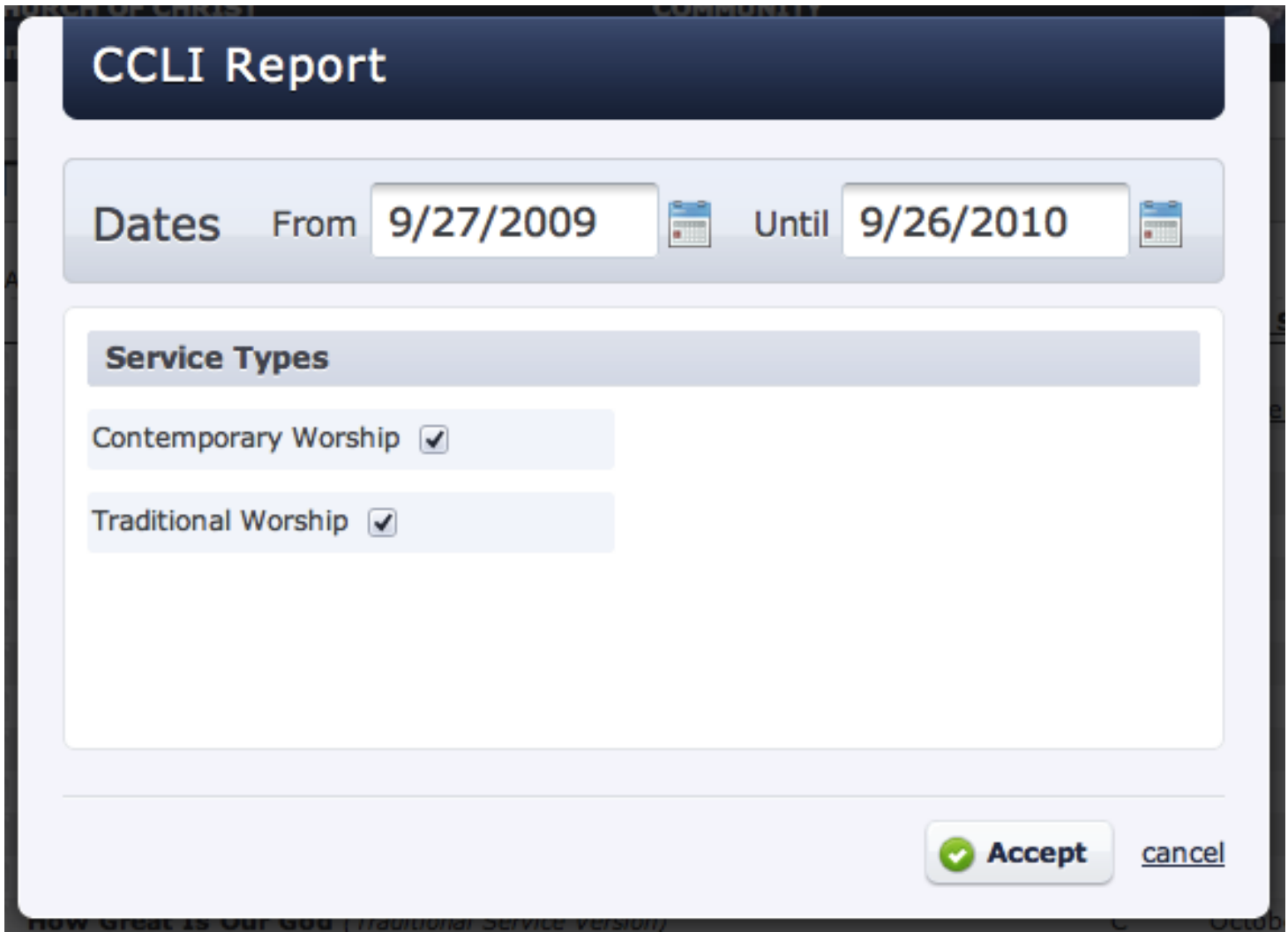


The screenshot shows a user interface for generating a CCLI report. At the top right, there are two links: "ccli report" with a refresh icon and "add a song" with a plus icon. Below this is a section titled "Scheduled" with a horizontal line underneath. A table follows with three rows of data. Each row contains a date and three action links: "edit", "hide", and "delete".

Scheduled	edit	hide	delete
12, 2009	edit	hide	delete
er 7, 2009	edit	hide	delete
ber 12, 2009	edit	hide	delete

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

Enter the dates and service types you wish to see.



The screenshot shows a "CCLI Report" configuration dialog box. It has a dark blue header with the title "CCLI Report". Below the header, there is a "Dates" section with "From" and "Until" labels. The "From" date is "9/27/2009" and the "Until" date is "9/26/2010", each with a calendar icon to its right. Below the dates is a "Service Types" section with a light blue header. Underneath, there are two checkboxes: "Contemporary Worship" and "Traditional Worship", both of which are checked. At the bottom right of the dialog, there are two buttons: "Accept" with a green checkmark icon and "cancel".

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](#)