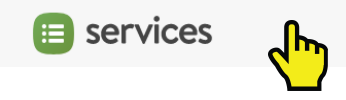# Planning Center: Services
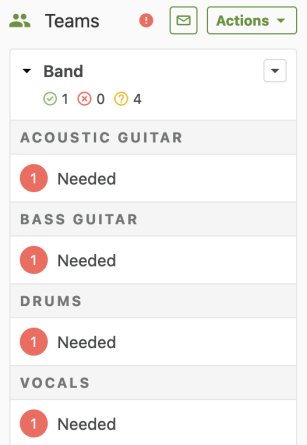
## Why use Planning Center Services:

A Sunday flowchart and volunteer list that leaders can view, edit, and use to contact volunteers.

## This document contains instructions on how to:

1. Login/view Services from a desktop computer
2. Schedule a volunteer
3. View all volunteers/add a volunteer to a team
4. Add song to Plan
5. Specify items in plan
6. Notifying People of Schedule

# Login/view Services from a desktop:

| | | |
|---|---|---|
| 1. | Go to: https://login.planning centeronline.com/login/new and sign-in | |
| 2. | Click *Home* in the top left of desktop screen. | home |
| 3. | In the dropdown menu beneath *Home* select *services* | services |
| 4. | Select *Plans* to see upcoming Sundays or events | services ⌄   My Schedule   Plans   Songs   Media   People   SunRidge Community Church |
| 5. | Select a date in the list. | |
| 6. | **Volunteers assigned or needed** for each position can be viewed in the list on the far left of the screen. | Teams  Actions ▾   Band  ✓1 ⊗0 ?4   ACOUSTIC GUITAR   1 Needed   BASS GUITAR   1 Needed   DRUMS   1 Needed   VOCALS   1 Needed |

7. **The flow** of the Sunday/event can be viewed in the centre of the screen.

| | | | | |
|---|---|---|---|---|
| ⋮⋮ | | GATHERING SONG | | |
| ⋮⋮ | 3:58 | Peace Has Come  C | | 📎 2 |
| ⋮⋮ | | WELCOME | | |
| ⋮⋮ | | WORSHIP SET | | |
| ⋮⋮ | 0:00 | Joy To The World  F | | 📎 2 |
| ⋮⋮ | 0:00 | Angels We Have Heard On High  D | | 📎 1 |
| ⋮⋮ | 0:00 | Refiner's Fire  E | | 📎 2 |
| ⋮⋮ | | ANNOUNCEMENTS | | |
| ⋮⋮ | 0:00 | Announcements<br>Letter<br>Childrens Moment<br>Giving<br>Halftime | | |

# Schedule a volunteer:

**IMPORTANT ➔ Please DO NOT just schedule volunteers in here without personally asking them first  somehow.** You can reach out to them via text, email, phone, in-person, or through a personal email sent through the planning center platform but it *must* be a personal note. In addition to asking volunteers if they're available, try to regularly:
1. Thank them for being on the team and note maybe the unique way they contribute
2. Include a reminder of the "why"... why is this job important? How does this job bring people to Jesus?

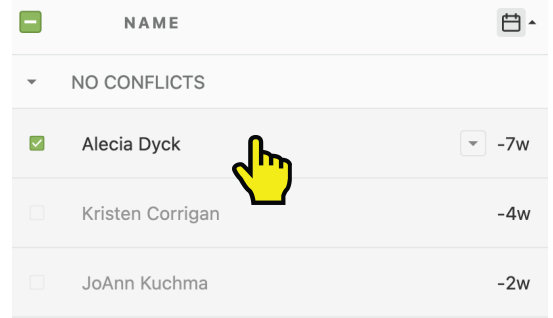1. Click on the position you want to edit in the left hand column of the associated event.

▼ **Connect Centre**  ▼
✅ 0  ❌ 0  ❓ 1

CONNECT CENTRE

1  Needed   —  1  +

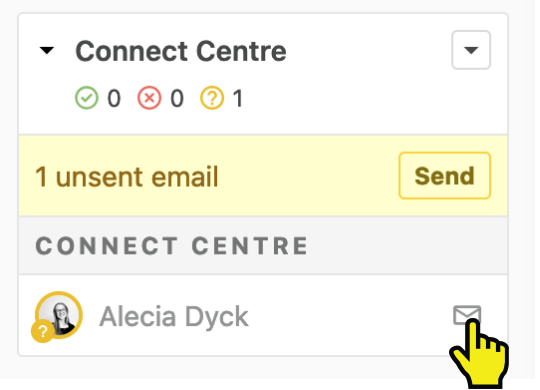| | | |
|---|---|---|
| 2. A list of possible volunteers will appear on the right side of your screen. Select who you would like to schedule. (If the person is not on the list, see next section) | | NAME 📅<br>▾ NO CONFLICTS<br>☑ Alecia Dyck  ▾ -7w<br>☐ Kristen Corrigan  -4w<br>☐ JoAnn Kuchma  -2w |
| 3. Click *Add* in the top right above the list of names to add this person to the list. | | ⊕ Add 1 |
| 4. The volunteer will appear yellow with a question mark until they have confirmed.<br>    a. **Manually confirm:** A volunteer can be manually confirmed if confirmation is received via text or other communication.<br>    b. **Email Confirm:** You can email a volunteer from within Planning Center Services by clicking the mail icon to the right of their name. | | ▾ **Connect Centre**  ▾<br>⊘ 0 ⊗ 0 ⦵ 1<br>1 unsent email  **Send**<br>CONNECT CENTRE<br>Alecia Dyck ✉ |
| **If a volunteer has a yellow "?"** *and* it says unsent email, this invitation will **not** appear as a pending request in their "My Schedule" tab. | | |
| 5. If the volunteer has confirmed they are able to serve, their name will appear with a green checkmark as shown here. | | ▾ **Connect Centre**  ▾<br>⊘ 1 ⊗ 0 ⦵ 0<br>CONNECT CENTRE<br>Alecia Dyck |
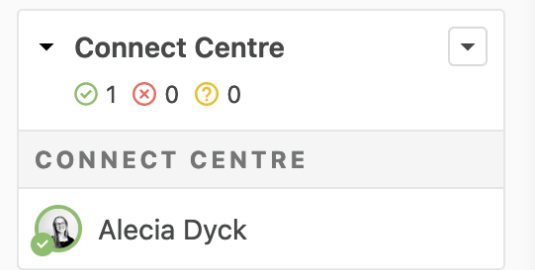
# View all volunteers/add a volunteer to a team

1. Select *People* from the top navigation
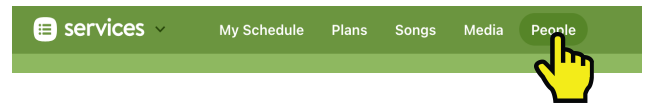
2. **To view all individuals** click *People* on the left of the screen (Note there is a filter option. To view *all* people, clear the filter or select "view all people")
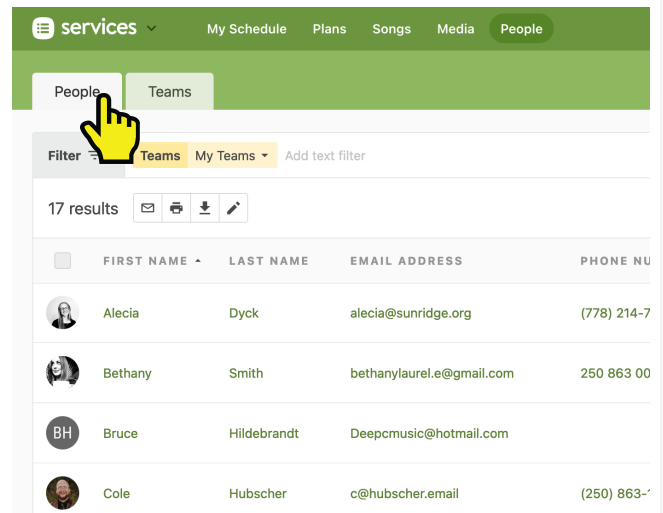
3. **To view volunteers on each team**, click *Teams* (Note there is a filter option. To view *all* teams, clear the filter or select "view all teams")
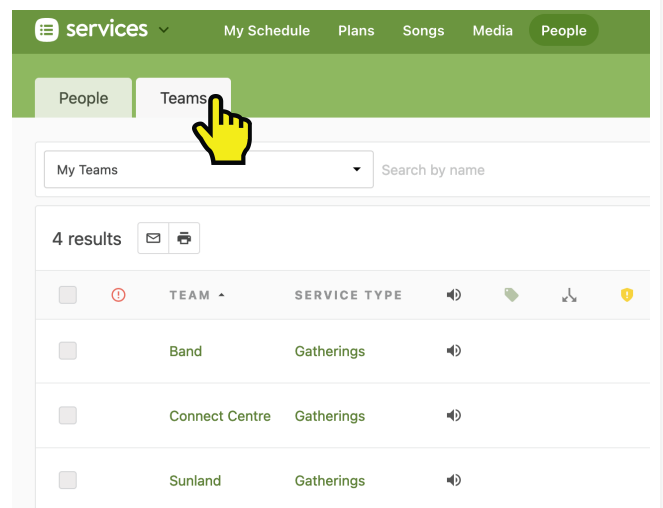
| | | |
|---|---|---|
| 4. Click on each team to view:<br>    **a. List of volunteers**<br>    b. **Commitment preference** of each person (probably needs updating) | | |

4. Click on each team to view:
   a. **List of volunteers**
   b. **Commitment preference** of each person (probably needs updating)

**Connect Centre**

Settings   Members

| All Team Members | 3 |
|---|---|
| Team Leaders | 2 |

POSITIONS

| Connect Centre | 3 |
|---|---|

**Add position**

**All Team Members**

People added to any position within this team. To add or remove people, first

| FIRST NAME ▲ | LAST NAME | POSITIONS |
|---|---|---|
| Alecia | Dyck | Connect Centre |
| JoAnn | Kuchma | Connect Centre |
| Kristen | Corrigan | Connect Centre |

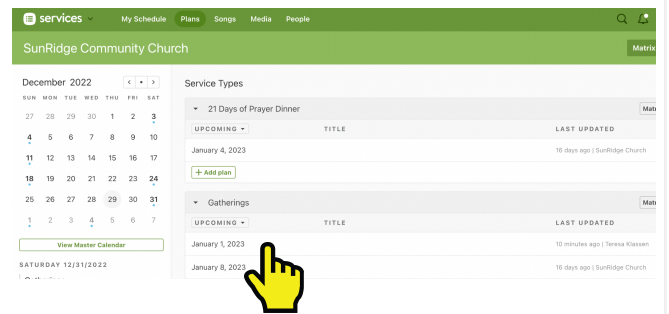5. **To add a volunteer** to a position, click on the position from the left side of the screen

**Connect Centre**

Settings   Members

| All Team Members | 3 |
|---|---|
| Team Leaders | 2 |

POSITIONS

| Connect Centre | 3 |
|---|---|

6. Select *Add Person.* If you have trouble after this, give Alecia a shout ([alecia@sunridge.org](mailto:alecia@sunridge.org)) as it's hard to write instructions for all the options hereafter.

**Connect Centre**

Settings   Members

| All Team Members | 3 |
|---|---|
| Team Leaders | 2 |

POSITIONS

| Connect Centre | 3 |
|---|---|

**Add position**

**Connect Centre**

**Add person**

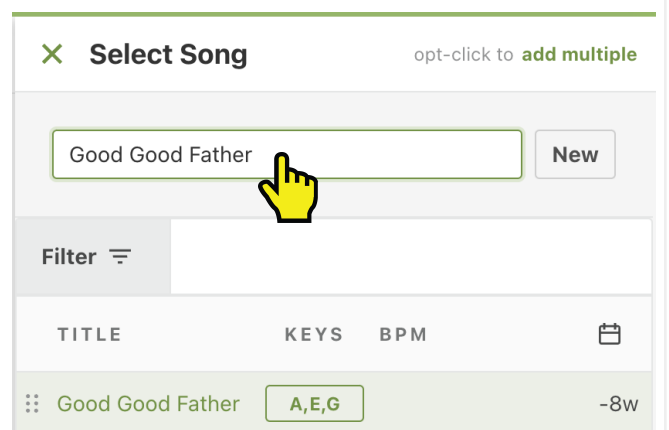| NAME ▲ | LAST NAME | PREFER |
|---|---|---|
| Alecia | Dyck | As often |
| JoAnn | Kuchma | As often |

# Add song to plan

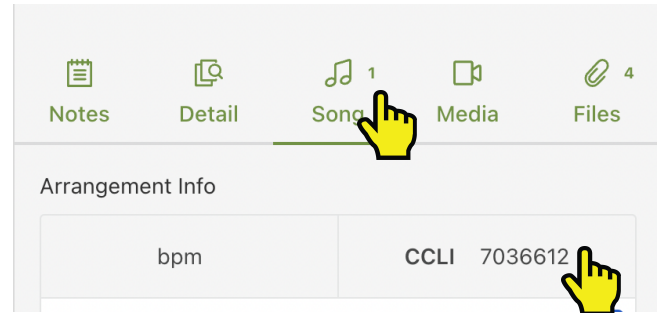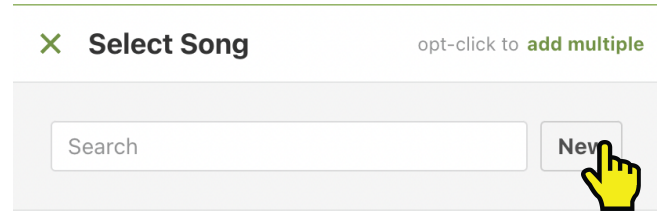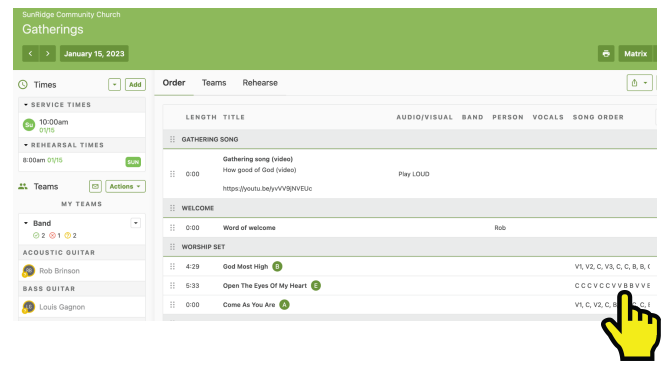| | |
|---|---|
| 1. Select the date of the plan you'd like to add a song to. |  |
| 2. Select *Add* and then select *Song* in the dropdown |  |
| 3. Search the song title. If it appears, click on it. If it does not appear, see step 5 |  |

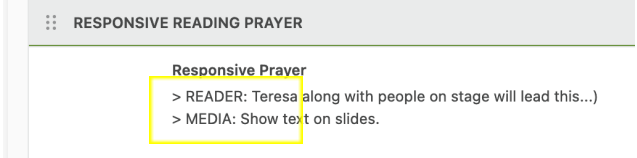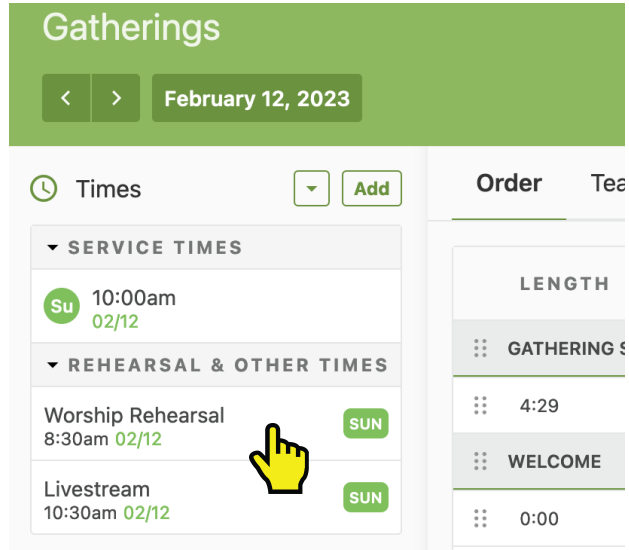| | |
|---|---|
| 4. Scroll down a bit and select *Song*. To confirm this is the song you want, go to https://songselect.ccli.com/ and search the CCLI #. To view the song lyrics get login info by emailing info@sunridge.org |  |
| 5. **If the song does not appear** in the list, select *New* and find the song. This database is from https://songselect.ccli.com/ |  |
| 6. Add the verse order you intent to play in the space shown on the flow. Can't view this area? See step 6b. |  |
| 6b. To view Verse order and other notes on flowchart, click the "III" icon on the top right and check the boxes as shown |  |
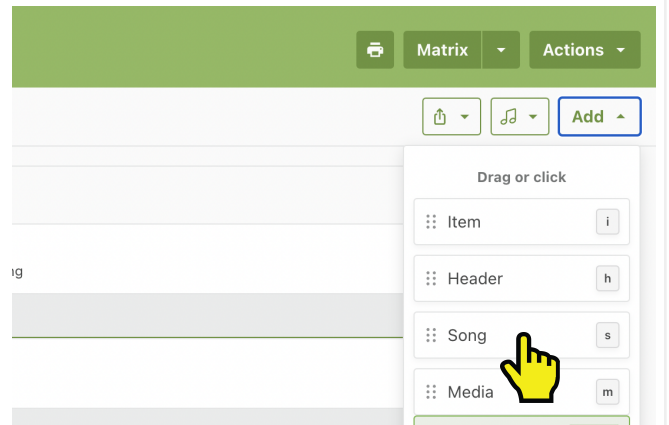
## Specify items in plan

| | |
|---|---|
| 1. When typing instructions to specific roles such as sound, media, or other notes, please type the following into the item description at **the top** of the text::<br>   a. > READER:<br>   b. > SOUND:<br>   c. > MEDIA: | **RESPONSIVE READING PRAYER**<br><br>**Responsive Prayer**<br>> READER: Teresa along with people on stage will lead this...)<br>> MEDIA: Show text on slides. |
| 2. When specifying text should appear on slides add "---" (3 dashes) at the beginning and ending of each section of text you'd like as a slide | ---<br><br>Leaders: Heavenly Father we are so thankful that You<br><br>People: You are the God who calls us to move forward<br><br>--- |

# Notifying People of Schedule

| | |
|---|---|
| **Wondering who will be notified about what time and when?** Click on the time item in the left column to view which teams will receive reminder emails and when. | **Gatherings**<br><br>‹ › February 12, 2023<br><br>🕐 Times ▼ Add    Order   Tea<br><br>▾ SERVICE TIMES<br><br>Su 10:00am 02/12    LENGTH<br><br>▾ REHEARSAL & OTHER TIMES    ⠿ GATHERING S<br><br>Worship Rehearsal 8:30am 02/12   SUN    ⠿ 4:29<br><br>Livestream 10:30am 02/12   SUN    ⠿ WELCOME<br><br>   ⠿ 0:00 |
| **Worship Leading?:** Double check that the Worship Rehearsal time (pictured above) is correct so people involved will arrive at | |

| church at the right time. | | |