

Planning Center Services

Logging In

To log in under planning center, head to <https://login.planningcenteronline.com/login/new>

If you are not already logged in, you will be presented with a webpage like this:

Login

Your email or phone

Your password

[Need a password?](#) [Sign in](#)

If you've never logged in before, you may need to create a password and you can do so by clicking the [Need a password?](#) button.

It will ask you to provide your email or phone number that is on file in the church database. If you are unsure what email or phone number that is, please ask us, as it is very important to use that same email or phone number so we do not create duplicate accounts for you.

Password Reset

Enter an email address or phone number to receive a code that can be used to set your password.

Email or Phone

Cancel

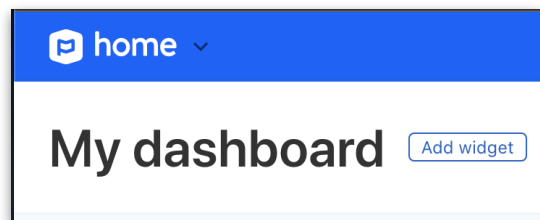
Send Code

This process will send you an email or text with a code to authenticate yourself with and then create or update your password. Once your password is set, go back to the login page and login with that email/phone and password.

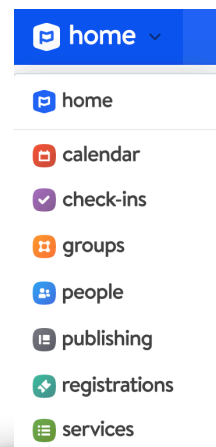
Planning Center

Once logged in, you will be presented with your dashboard, which can be customized to show

different information. However we will be moving to the Services portion of Planning Center from here.

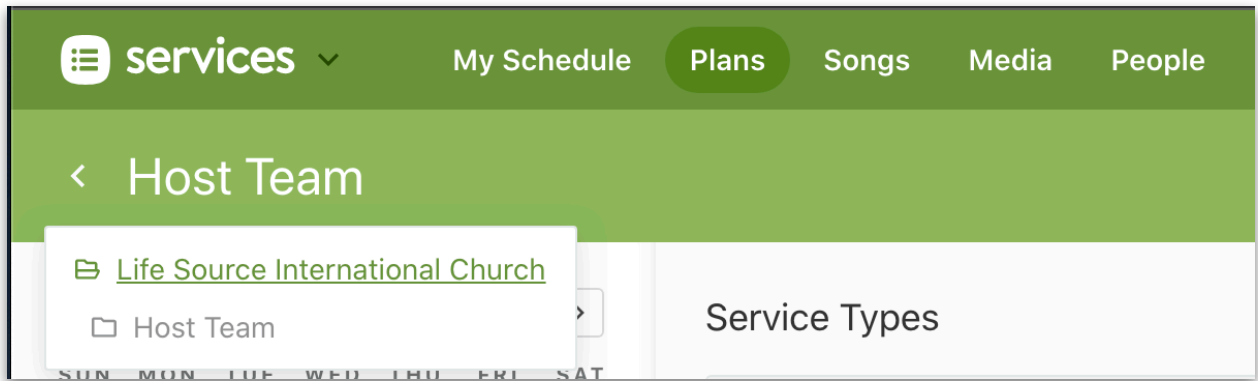


To do so, click on the Home button and choose Services

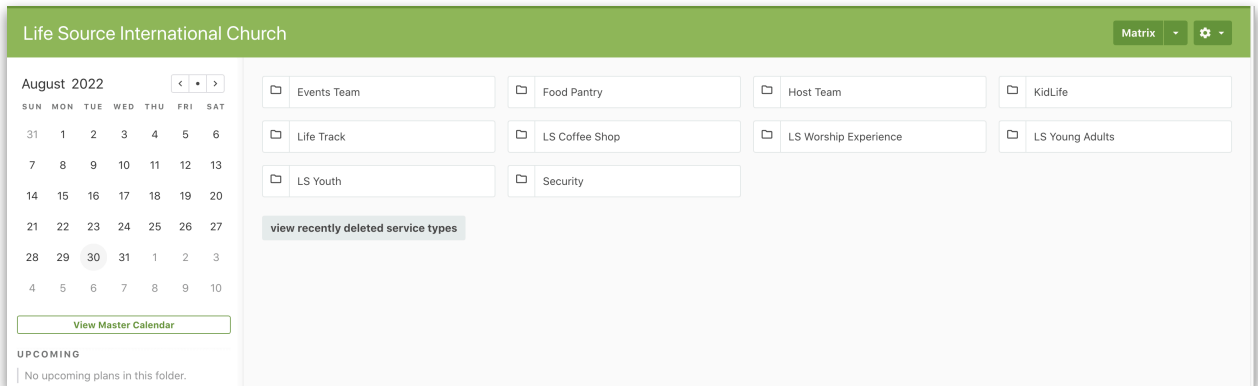


Planning Center Services

Your Planning Center Services page may look different than others, but to get to the main folder that contains all the Serving Teams, click on the “plans” tab and make sure you navigate to the Life Source International Church folder by clicking on the title.



In this example, Host Team showed up by default, so I clicked on the arrow next the Host Team title to then see Life Source International Church as an option, then click on that to see all the teams



Your Teams

Many of the teams are listed when viewing the Main Life Source International Church folder. In this example, we will use the Host Team. After clicking on the Host Team, a new page shows up where it splits the schedule up between Parking Lot Team and Host Team.

Each Schedule is based on a Service / Event. So Sunday September 4th's schedule is listed here.

By clicking on the September 4, 2022 plan for Host Team You will see the Schedule for that day

Scheduling

Teams [Actions]

OTHER TEAMS Hide

- Host Team 9am [dropdown] (0 green, 0 red, 19 yellow)
- Host Team 10:45am [dropdown] (0 green, 0 red, 19 yellow)

Files

Notes [Add]

Service Types

- Host Service [UPCOMING] September 4, 2022 [+ Add plan]
- Parking Lot [UPCOMING] September 4, 2022 [+ Add plan]

Once you are in the September 4th plan, you will then see on the left of the page it is split between the service times; 9am and 10:45am.

Host Team 9am [dropdown] (0 green, 0 red, 19 yellow)

- COFFEE SHOP DOOR GREET... 1 Needed
- CONNECT STATION 2 Needed
- LOBBY DOOR GREETERS 4 Needed
- SECTION 1 USHER 1 Needed

By clicking on the Host Team 9am or 10:45am you will see each position that needs covered. By clicking on a position, on the right of the page a section will pop up to choose an individual to schedule for that position.


This is what you see on the right of the page when scheduling a position.

X Coffee Shop Door Greeter 9am ⊕ Add 0

1 person still needed

Team Member Guest

Search

NAME 

NO CONFLICTS

Dennis Parker Jr.

Assign new person to Coffee Shop Door Greeter

Search by name, tag, or position

or [auto-assign members](#) from usage

If no one has served in that spot before, it will ask you to search for a person to add to that position.

NEVER SCHEDULED

- JO John Olszewski
- jo John Okezie
- JO Johnson Oyegole
4437628397
- JO John Obaoye
4432488029 stalwart0301@gmail.com

ARCHIVED

- JO John Opaleye
410-444-3330

Create a new person: "john o"

john o

or [auto-assign members](#) from usage


Once you've selected someone, don't forget to hit the green "ADD" button at the top right.

X Coffee Shop Door Greeter 9am ⊕ Add 1

All positions filled

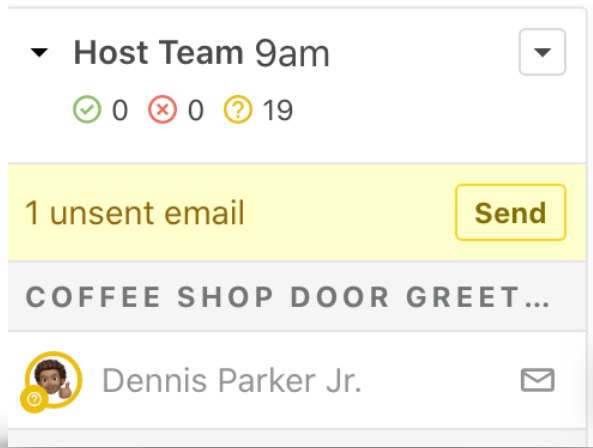
Team Member Guest

Search

NAME 

NO CONFLICTS

Dennis Parker Jr.

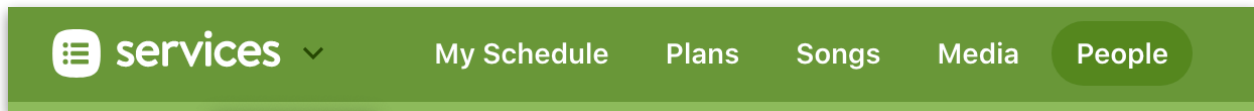


After you've hit the "ADD" button, they will show up in the post of scheduled positions, and once you're ready to send your team their schedule request, you can hit the send button to send them an email. If their cell carrier is listed in their profile, they'll also receive a text. Even more, if you download the Planning Center Services App, they'll be able to get notifications and accept or decline their schedule through the app.

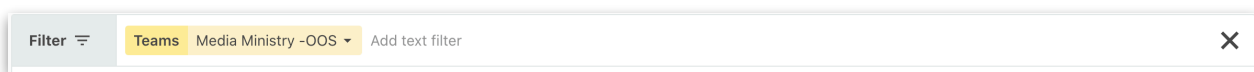
Adding Team Members

When you start off, you might not have any people to schedule because they have yet be added to the Service section of Planning Center.

To add your Team Members to your Team, choose the People tab in Services

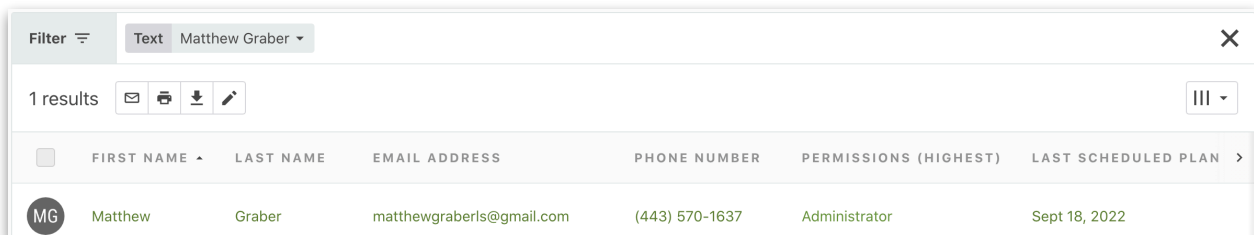


You might automatically see your team members when you're on this page, here it automatically shows me the team members that I lead by adding this filter.



Click the X to the right to clear the filter and see all people in Planning Center Services. It's best to search for your team member's names to be sure they're not already in Services before you decide to use the Add Person button at the top right of the page.

Here I search for a team member by name, and they show up because they are already in Services. But we need to see if they are part of the correct team. Clicking on their name will let us see more info about their Services Profile



Once in their profile, the bottom right of the page shows what teams they are on and each position they have served in.

The screenshot shows a 'Teams' page with an 'Add' button in the top right. It displays two team profiles under the heading 'LS Worship Experience > Monday Night Prayer' and 'LS Worship Experience > Special Events'.
 The first team is 'Media' (Leader) with roles: Prayer Tech Facilitator, Sound, and a frequency of 'As often as needed'.
 The second team is 'Media Ministry' (Leader) with roles: Computer, Director, Lights, Stage Camera, Tripod Camera, Audio Broadcast, a frequency of 'All times', and a sub-frequency of 'As often as needed'.

Host Team
Coffee Shop Door Greeter (Host Team)
Connect Station (Host Team)
Lobby Door Greeters (Host Team)
Section 1 Usher (Host Team)
Section 2 Usher (Host Team)

If this section is empty, click on "Add" to bring up a menu to add them to your team and assign an initial position they fill. You can add more as you schedule them in the future

If you are trying to add someone who has never been on a team, go to a service

Adding Plans

Plans are required to schedule your team. A plan is just setting a date and time for an event, mostly Sundays, but sometimes for special events on other days and times.

The screenshot shows the 'Plans' tab in the Planning Center Services interface. It features a green header with navigation tabs for 'Plans', 'Songs', 'Media', and 'People'. Below the header, there are 'Matrix' and settings icons. The main content area is titled 'Service Types' and includes an 'Add' button. It lists two service types: 'Host Service' and 'Parking Lot'. Each service type has a table with columns for 'UPCOMING', 'TITLE', and 'LAST UPDATED'. Below each table is a '+ Add plan' button.

In Planning Center Services, click on the Plans tab at the top to see all the plans for your Team Folder. To add a plan, click the green "ADD PLAN" button below the existing plans for that team.

A menu will pop up for you to add a new plan, and it uses the previous plan times as a template. You can also create multiple successive plans by changing the quantity. This way you can create several weeks of services as once and then go in and make the schedule for each.

Add Plans

Quantity	Copy Times From ⓘ	Starting On
<input type="text" value="1"/>	<input type="text" value="September 4 2022"/>	<input type="text" value="September 11 2022"/>
Dates		Templates
<input type="text" value="September 11 2022"/>		<input type="text" value="Host Service"/>

Cancel Add 1

Adjusting Positions

Sometimes you need more positions available for special services. So, say you need two ushers in a section or more door greeters. You can adjust that per service by clicking the “Actions” button and choosing “Needed Positions”

COFFEE SHOP DOOR GREET...		
	Dennis Parker Jr.	
0	Needed	<input type="button" value="−"/> 0 <input type="button" value="+"/>
CONNECT STATION		
2	Needed	<input type="button" value="−"/> 2 <input type="button" value="+"/>
LOBBY DOOR GREETERS		
4	Needed	<input type="button" value="−"/> 4 <input type="button" value="+"/>

Teams
 Actions ▾

OTHER

- ▶ **Host Team 9**
✔ 0 ✖ 0 ? 1
- ▶ **Host Team 1**
✔ 0 ✖ 0 ? 1

Files
 Notes

- Add People
- Import Template
- Needed Positions
- Auto-Schedule
- Email
- Take Attendance
- Bulk Edit

Manage Teams

This will change the positions view of the positions by adding plus and minus buttons to change the number of spots to fill for each position.

Once you're done editing, be sure to hit the green "Done" button where "Actions" used to be.

