



THE BROOK

Planning Center Training/Refresher



Agenda

Welcome & Opening Prayer

Planning Center Training
(For Desktop & Mobile)

Q & A

Closing Remarks/Prayer



Using the Services Desktop or Mobile App

- The Services mobile app is available for iOS and Android. You can install it on your device from one of these App stores:
- iOS: [App Store](#)
- Android: [Google Play](#)
- From a desktop you can go to www.planningcenter.com





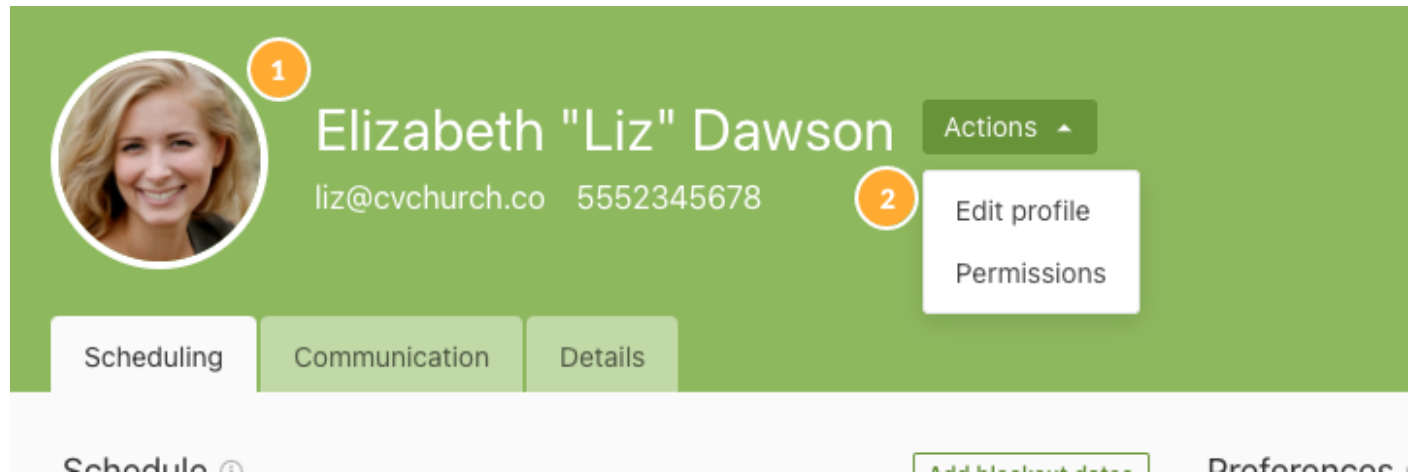
For Desktop Users

Updating Personal Information (Desktop)

You can edit your photo and contact information from the top of the profile.

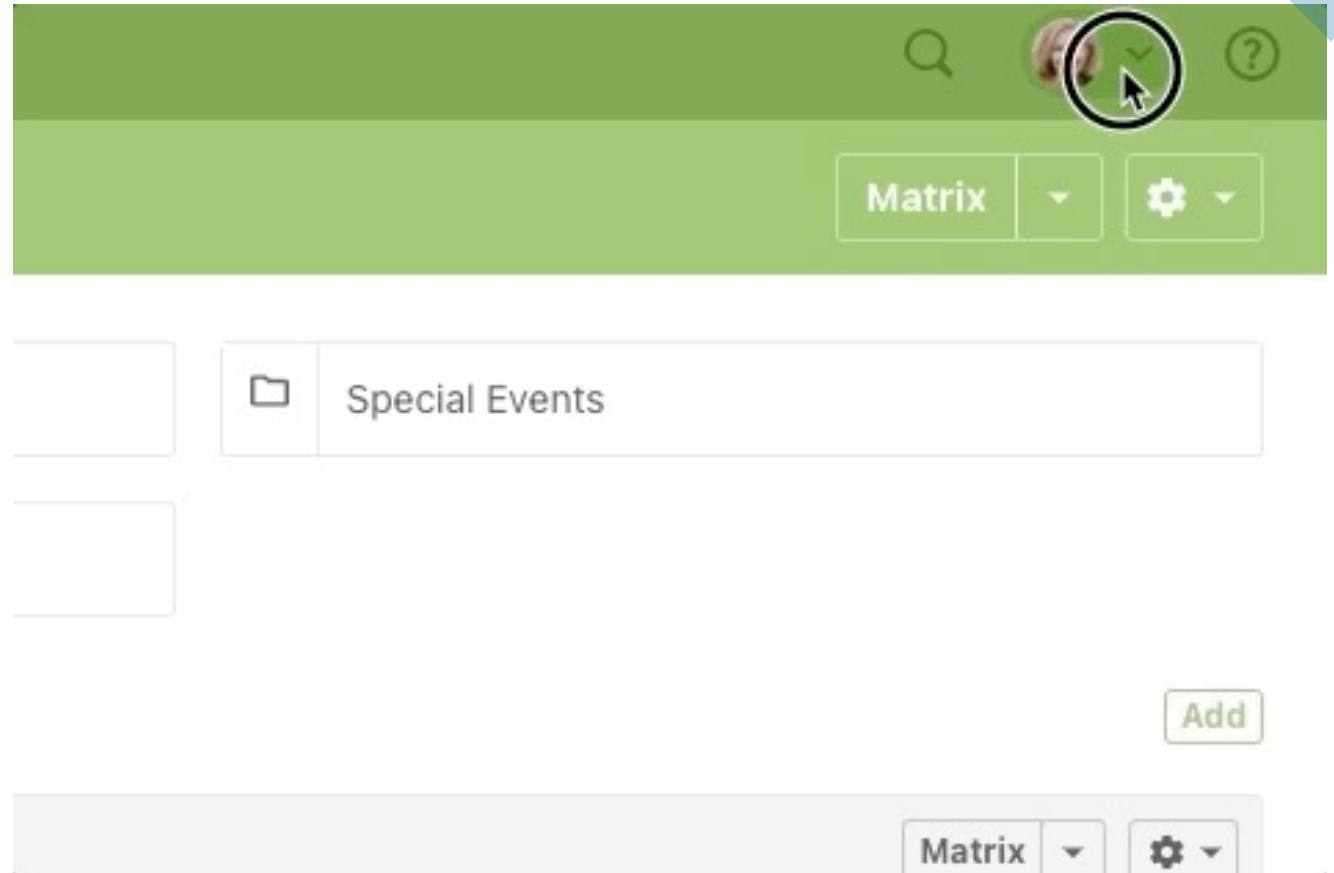
1. To change your profile picture, click the current picture, and then choose a new image (or gif) file from your computer or photo gallery on your phone.
2. To update your name, email addresses, phone numbers, or addresses, click the Actions menu and select *Edit profile*.

Please Note: If you change your email address, you will need to use the new email address the next time you log in to your account. Your password will remain the same unless you reset it.



Update Your Profile

- From your personal profile page, you can update your email address, change your password, and manage scheduling preferences.
- Go to your profile by clicking your name in the upper right corner of any Services page, and then click *Profile*.



My Schedule Page

You can accept or decline scheduling requests, view the plans you are a part of, and block out dates you know you will be unavailable from your My Schedule page.

1. View a calendar overview with color-coded symbols under the dates.
2. The scrolling list of assignments adjusts to match the calendar view.
3. Set [blockout dates](#) to let your team leaders know when you aren't available, [view any messages](#) sent or received in Services, or email a team leader.
4. [Sign up](#) for a position, or [respond to](#) pending scheduling requests.

My Schedule

September 2020

SUN	MON	TUE	WED	THU	FRI	SAT
30	31	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	1	2	3
4	5	6	7	8	9	10

+ Add blockouts Subscribe

THURSDAY 10/01/2020

Contemporary Service
Band Rehearsal 11:00am - 12:00pm

SUNDAY 10/04/2020

Contemporary Service
Service Time 9:00am - 11:29am

Youth Group
Service Time 7:00pm - 9:00pm

Block Out Dates My Messages Email My Leader

Signup Sheets 1

Contemporary Servi... NEW
Oct 18 - Oct 25
Sign Up

Pending 2 Accept All

Sept 13 Youth Group
Bass Band
Keys Band

Sept 16 Midweek Service
Worship Team Vocals
Decline... Accept

Update Scheduling Preferences and Block-outs

The Scheduling tab shows your blocked out dates, upcoming plans, and any scheduling preferences.

1. [Block out dates](#) ahead of time when you know you'll be unavailable.
2. Any dates you are scheduled for as well as any [blockout dates](#) that you have set are listed here. Click on the date of any listed plan, and it will take you directly to it. Click any blockout date to edit it.
3. [Set Scheduling Preferences](#) to let your team leader know how often, with which family members, and on which teams you prefer to be scheduled.
4. View [teams and positions](#) that you are assigned to and set scheduling preferences for specific teams.

The screenshot displays the 'Scheduling' tab in a software interface. At the top, there are three tabs: 'Scheduling', 'Communication', and 'Details'. The 'Scheduling' tab is active. Below the tabs, there are three numbered callouts: 1. 'Add blockout dates' (pointing to a button), 2. 'Status' (pointing to a circular progress indicator), and 3. 'Preferences' (pointing to a section header). The main content area is divided into two columns. The left column has a 'Dates' tab and a 'Templates' tab. Below these is a dropdown menu set to 'Since 1 month ago'. A 'Status' section shows a circular progress indicator with 'CONFIRMED' (8), 'UNCONFIRMED' (6), and 'DECLINED' (0). Below this is a calendar view with a table of dates and events. The right column has a 'Preferences' section with 'Up to 2 plans per month' and 'Schedule me when Richard is scheduled in the same plan'. Below that is a 'Teams' section with 'Add' button and a list of teams with their roles and frequencies.

DATE	EVENT
Jan 1 6:00pm - 9:00pm	Blockout: Monthly on the 1st Friday Family game night
Jan 17	Contemporary Service Worship Team (Vocals)

TEAM	ROLE	FREQUENCY
San Diego > Student Ministries > Youth Group	Audio/Visual Leader	As often as needed
Sydney > Contemporary Service	Band	As often as needed
Sydney > Sunday Service	Band	As often as needed
San Diego > Student Ministries > Youth Group	Cafe Leader	As often as needed

Sign Up for a Position

The Signup Sheet email contains a link to sign up for the assigned position. Click the link to be taken to the Signup Sheet.

Hi Elizabeth,

Signups are open for the following dates. To respond or view the available openings, click the link below.

Thanks,

Lisa Kuder
Centerville Church

[View Signup Sheet](#)

 planning center

 services

You are receiving this communication because you're signed up with Centerville Church's Planning Center account.

You can also select *Sign Up* from their [My Schedule](#) page.

The screenshot shows a user interface for a church website. At the top, there is a green navigation bar with a menu icon, the text "services", a dropdown arrow, and a "My Schedule" button. On the right side of the bar, there is a profile picture and the text "Centerville Church" with a help icon. Below the navigation bar, the page title "My Schedule" is displayed. To the left is a calendar for May 2019 with days of the week (SUN to SAT) and dates. To the right are three buttons: "Block Out Dates", "My Messages", and "Email My Leader". Below these is a section titled "Signup Sheets" with a notification icon. Underneath, there is a card for "Contemporary Service" with the dates "Oct 4 - Oct 18" and a "Sign Up" button. An orange arrow points to the "Sign Up" button. At the bottom of the calendar area, there are buttons for "+ Add blockouts" and "Subscribe".

At the top of the Signup Sheet, each person will see *sign up* for any assigned and available positions.

 Contemporary Service Signup Sheet			
	Oct 4, 2020	Oct 11, 2020	Oct 18, 2020
Series Title	Pursued	Pursued	Joyride
Plan Title	Pursued by Grace	Pursued to Become	Joy in the Morning
Vocals			
Choir			? Dalton Berg ? DJ Tanner
Worship Leader	? Amber Benn		
Worship Team	sign up...		sign up... ? Dalton Berg ? Katie Chen
▶ Order Of Service			


- When someone clicks *sign up* in the Signup Sheet, they will see all the times associated with that position with a note to let them know they are confirming the date(s). If they have any conflicts, they can hover over the conflict for more information.
- Clicking *Accept* adds them to the plan as *Confirmed* and adds the times to their schedule and [calendar](#), if synced.

Sunday Service | Signup Sheet

Signup

Scheduling Conflicts
Hover over conflicts for details. To ignore & schedule anyway click accept, otherwise cancel.

1 Conflict

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

Service
12/10 at 9:00A
12/10 at 11:00A

Rehearsal
12/06 at 8:30P – Practice

Other
12/10 at 8:30A – 1st Service Prayer
12/10 at 10:30A – 2nd Service Prayer

This will be confirmed and added to your schedule.

Accept

Messaging Settings

The *Communication* tab allows you to view sent and received messages, reset your password, and set text notification options.

1. View any sent or received Services emails from the last three months. Click an email to view its details.
2. If someone forgets their password, click *Send Password Reset Email*. A reset password email will be sent to all email addresses on the profile. (Desktop)
3. Choose whether you want to receive [notifications](#) in Church Center or the Services mobile app. (Desktop)
4. If you list a mobile number and carrier using the *Edit* button, you can then choose which [text message](#) notifications you'd like to receive when you get a Services email. (Desktop)

Messages

Received Sent

Lisa Kuder 19 hours ago
September 26, 2021

Lisa Kuder 19 hours ago
Text Notification

Lisa Kuder 21 hours ago
September 26, 2021

Lisa Kuder 21 hours ago
Text Notification

Email history is only kept for three months.

Notifications

Preferred App [Get the app](#)

Church Center

Manage notification settings from your profile in the Church Center app.

5552345678 sprint-nextel [Edit](#)

TYPE	TEXT
General	<input checked="" type="checkbox"/>
Schedule	<input type="checkbox"/>
Reminders	<input checked="" type="checkbox"/>

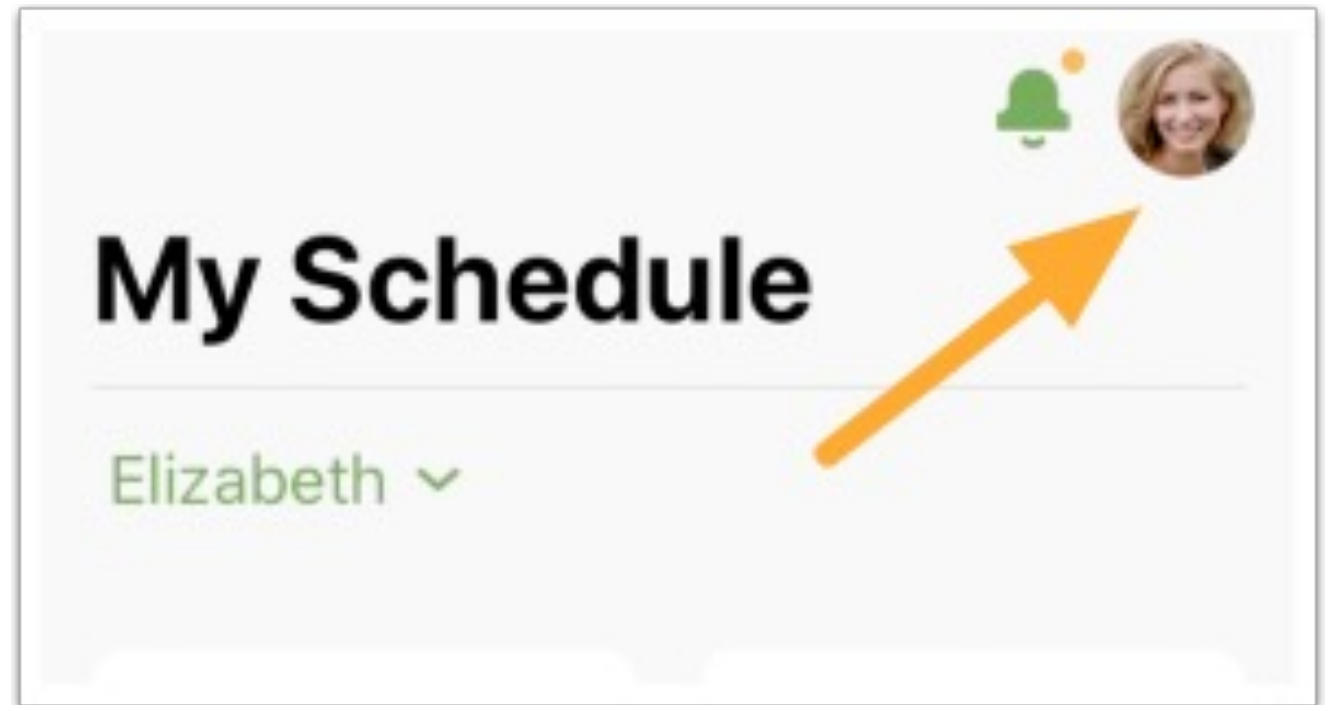
Password [Send Password Reset Email](#)

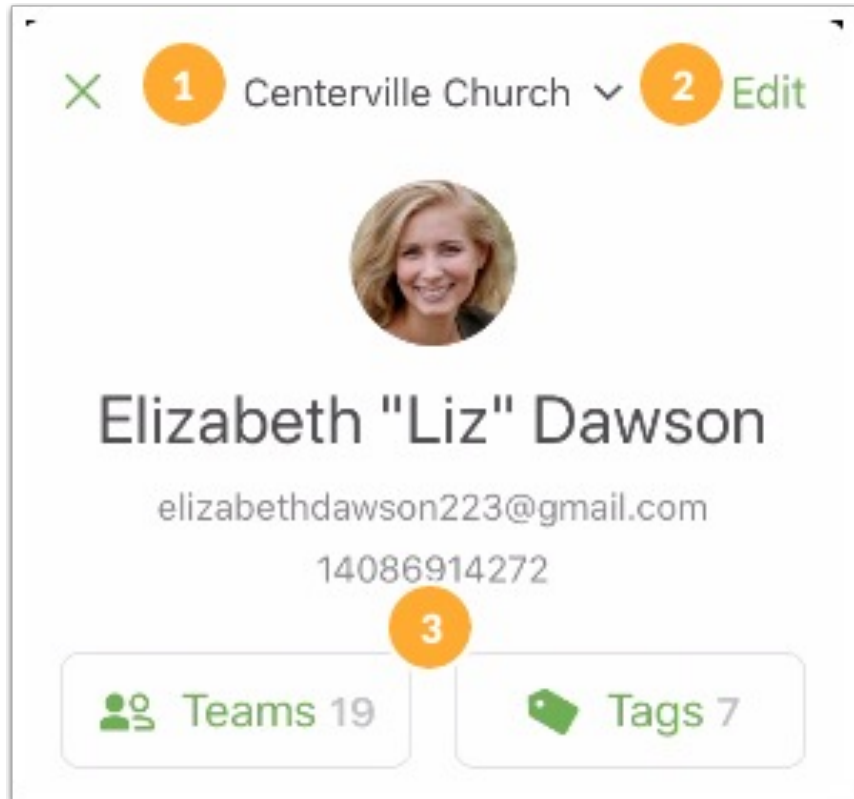


For Mobile Users
(Androids and iOS users)

Manage Your Profile- Mobile Device

- From your profile, you can update your contact information, respond to scheduling requests, and set blockouts. You can also view email and access teams, tags, help, and settings.
- To access your profile, tap your photo in the upper right corner.

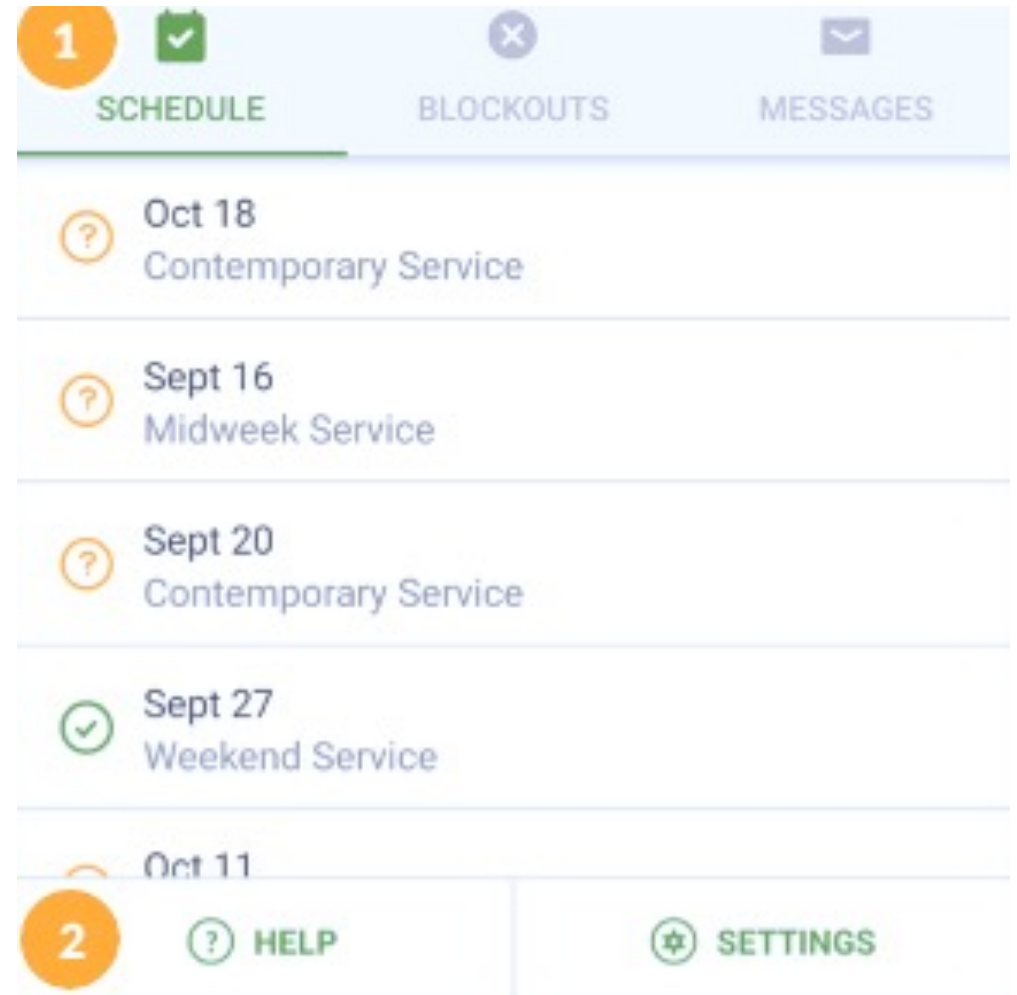




From your Profile page, you can take several actions.

1. Tap to switch churches if you have [linked accounts](#).
2. Tap *Edit* to update contact info, your photo, or notifications preferences.
3. Tap to view your Teams or [Tags](#). From the Teams page, you can update [team assignments](#) and [scheduling preferences](#). You need at least Scheduler permissions to see tags.

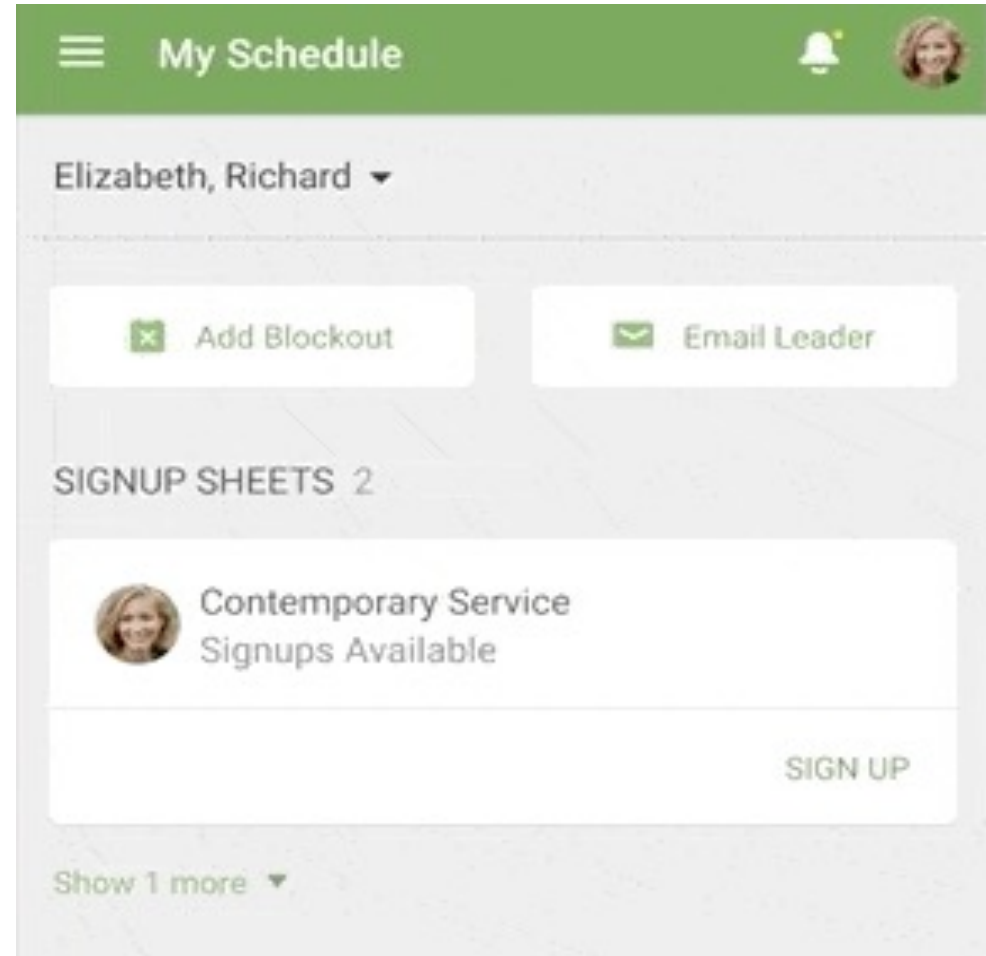
1. Choose a tab to view your schedule, set [blockout dates](#), or view sent and received messages.
2. From Help, you can access support.
 - From Settings, you can update [notifications](#) or [dark mode](#) settings.
 - You can only view your own schedule and block out dates from the profile. To access your household schedule, go to the [My Schedule](#) page.



Signup Sheets

If you're assigned to a team that has signups available, view the signup sheet by tapping *Sign Up* from **My Schedule**. You'll see the different dates that you can sign up for a position. After you choose a date, tap *Accept* to accept it.

Please Note: You will be able to see when signup sheets are available for others in your household, but you will not be able to sign up for them.



Thank you for the
dedication to serve The
Brook!!!

