

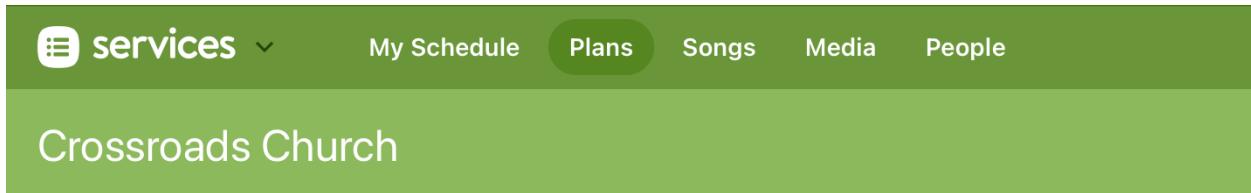
PCO Services Modules

Services is NOT just for service order planning, but volunteer scheduling as well. Most volunteers will only see the scheduling side of this module.

Services also has various roles/permissions for each person. You may or may not be able to see and edit each area in the Services module which determines what you can do.

Permissions: Scheduled viewer (most volunteers), Viewer (service plan viewers aka worship teams), Scheduler (team leaders), editor (can edit a plan but can't schedule), admin (full access)

Menu Bar



services ▾

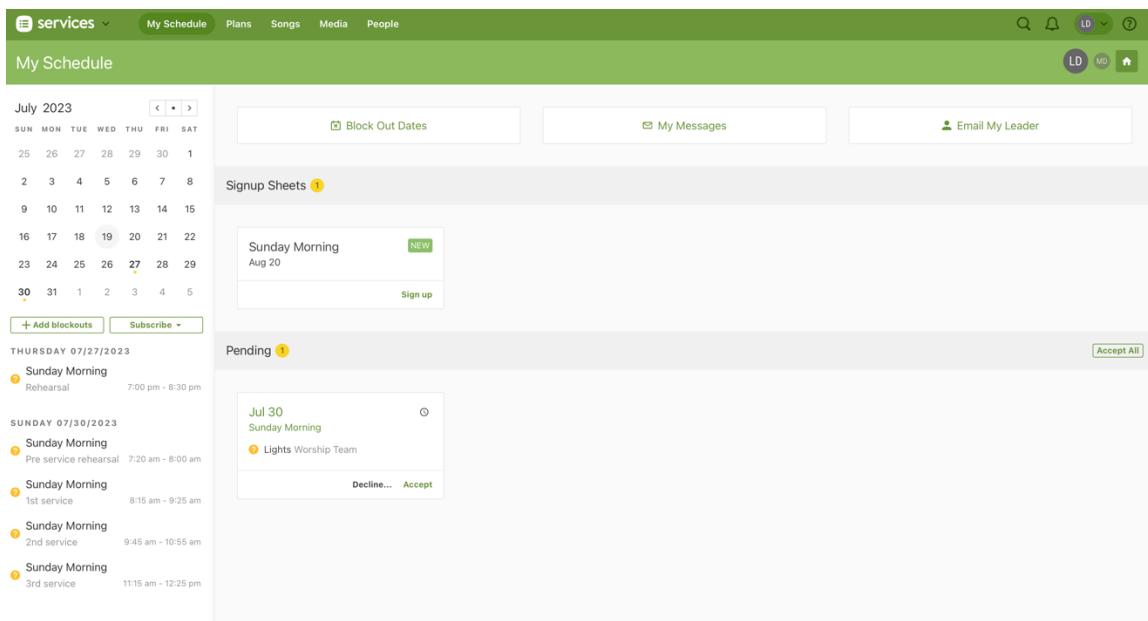
My Schedule Plans Songs Media People

Crossroads Church

A. My Schedules:

Each account holder uses this area to block out dates, sign up to serve, contact team leader and see messages sent to them

- a. Block out dates- opens a calendar to block out unavailable dates to serve
- b. My Messages- any messages sent through the team
- c. Email my leader- gives them direct access to contact team leader through email (this is by using services web or services app)
- d. Signup sheets (yellow circle indicates open spots or pending request)



services ▾

My Schedule Plans Songs Media People

Block Out Dates My Messages Email My Leader

July 2023

SUN MON TUE WED THU FRI SAT

25	26	27	28	29	30	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	31	1	2	3	4	5

+ Add blockouts Subscribe ▾

THURSDAY 07/27/2023

Sunday Morning 7:00 pm - 8:30 pm

SUNDAY 07/30/2023

Sunday Morning Pre service rehearsal 7:20 am - 8:00 am

Sunday Morning 1st service 8:15 am - 9:25 am

Sunday Morning 2nd service 9:45 am - 10:55 am

Sunday Morning 3rd service 11:15 am - 12:25 pm

Block Out Dates My Messages Email My Leader

Signup Sheets 1

Sunday Morning NEW Aug 20 Sign up

Pending 1

Jul 30 Sunday Morning Lights Worship Team Decline... Accept

- B. Plans- this is where scheduling is done per plan (more instructions below)
- C. Songs- all song library (only worship teams)
- D. Media- where pictures, videos, etc. used in plans is uploaded (only worship teams)
- E. People- where you'll find the various teams and volunteers used on Sundays

FIRST NAME	LAST NAME	EMAIL ADDRESS	PHONE NUMBER	PERMISSIONS (HIGHEST)	LAST SCHEDULED PLAN	LAST LOGIN	LAST SET BLOCKOUTS
Aaron	Mosdy			Viewer	Aug 20, 2023	Jul 18, 2023 9:58 PM	May 1, 2023 5:11 PM
AK	Abby	Krynock		Scheduled Viewer			Jul 18, 2
AM	Abigail	McIntire		Scheduled Viewer			Jul 17, 2
AD	Aleshcha	DeWitt		Scheduled Viewer			Jul 18, 2
AK	Allison	Keiser		Scheduler			Jun 5, 2
AM	Amy	Gerard		Scheduled Viewer			Apr 27,
AG	Andrea	Grove		Scheduled Viewer			Jul 17, 2
AP	Angela	Pearish		Scheduled Viewer			Jul 17, 2

- a. Click on certain people to email them in this module
- b. **TEAMS**- you need a team for each service plan because plans are associated with a specific day of that week (ex: Sunday morning, Good Friday, Christmas Eve) [change filter to of teams to just your teams that you lead]

TEAM	SERVICE TYPE	LEADERS	MEMBERS	POSITIONS	LAST SCHEDULED	CREATED ON
Safety Team	Sunday Morning	2	5	1	Aug 13, 2023 11:15 AM	Nov 30, 2022 8:20 AM
Sign Language Team	Sunday Morning	2	2	1	Never	Jul 10, 2023 12:33 PM
Worship Team	Sunday Morning	1	20	12	Aug 27, 2023 11:15 AM	Nov 30, 2022 8:20 AM

- i. Leader (designated by admins)
- ii. Members (added by team leader)
- iii. Positions- you create your own by clicking add position
 - 1. Click on that position to add the person

The screenshot shows the 'Worship Team' settings page. On the left, a sidebar lists team members by position: All Team Members (20), Team Leaders (1), and various positions like Auditioning, Bass, Computer Lyrics, Drums, Electric, Lights, Sound, Synth, Vocal-harmony, Vocal-melody, and Worship Leader (2). The 'POSITIONS' section is highlighted with a red circle. In the center, a table lists members for the 'Acoustic' position. The table has columns for FIRST NAME, LAST NAME, and PREFERENCES. Two members are listed: Cory Collins (As often as needed) and Michal Joy Falk (As often as needed). A red arrow points to the 'Add person' button at the top of the table. Another red arrow points to the 'Add position' button at the bottom left of the table. A red circle highlights the 'Remove a member from a position by clicking the red circle' link at the top right of the table.

2. You can hover over that person's name and click the circle with the line in it to remove them from that position (or team in the members list)

Settings:

Select your team type:

Rehearsal Team should only be for the Worship Team/Dive. No other team needs access to the songs and media

Secure Team- any team that requires a background check

Split Team- any team that doesn't serve all services but has shifts (ex: greeters and ushers)

1. Select if you want their schedule to be an automatic confirmed or have them manually confirm
2. Please choose yourself as the person who is replied to when a volunteer needs to communicate to you regarding the schedule
3. Any time a new schedule is created (Worship Dir. Creates these on monthly basis) then your schedule is automatically open for sign-ups or keep it off and manually open it in plans

The screenshot shows the 'Safety Team' settings page. On the left, a sidebar lists team types: Rehearsal Team, Secure Team, Split Team, and Tag Team. The 'Secure Team' section is highlighted with a red circle. In the center, the 'Scheduling Defaults' section shows the 'Status' as 'Unconfirmed' and the 'Notification' as 'Prepared'. A red arrow points to the 'Replies to' field, which is set to 'Ryan Lebo'. A red arrow also points to the 'Last Scheduled Date' dropdown. The 'Options' section includes 'Access for Scheduled Viewers' (set to 'Team Schedule'), 'Needed Positions' (with a note about creating a position when someone declines), and 'Signup Sheets' (with a note about auto-enabling for new plans). A red arrow points to the 'Auto-enable for new plans' checkbox. At the bottom, a note says 'use this ONLY if you want sign-ups for your team opened each time a new month is added'.

How to Schedule People in Plans (web version)

You'll see the various service types:

First Impressions Team- because they use different times and not service times

Good Friday Service Plan- designated to just Friday

Sunday morning Plan- designated to just Sunday morning

Dive Student Ministry- designated to Sunday nights

The screenshot shows the Crossroads Church service planning interface. At the top, there's a green header with the church name and a 'Matrix' button. Below the header is a calendar for July 2023. To the right of the calendar is a 'Service Types' section with a list of service types: Dive student ministry & Fuse, First Impressions Team, Friends of Jesus- Wednesday Night, The Access Coffee Shop, and Sunday Morning. Each service type has a 'Matrix' and 'Settings' button. Below the service types is a table of upcoming events. The table has columns for SERIES, UPCOMING, TITLE, and LAST UPDATED. The events listed are: Sunday Morning rehearsal (July 23, 2023, 7:00 pm), Sunday Morning Services (July 30, 2023), 30th Anniversary (August 6, 2023), 30th Anniversary (August 13, 2023), and 30th Anniversary (August 20, 2023). Each event has a 'Matrix' and 'Settings' button. On the left side, there are sections for 'View Master Calendar', 'THURSDAY 07/20/2023' (Sunday Morning rehearsal at 7:00 pm), 'SUNDAY 07/23/2023' (The Access Coffee Shop Services at 7:45 am, 9:15 am), and 'Sunday Morning Services' (8:15 am, 9:45 am, 11:15 am).

To schedule individuals through a repeated template hit the cog in the right-hand corner

This screenshot shows the 'Sunday Morning' service type details. On the right, there's a vertical menu with 'Matrix', 'Settings', 'Teams', 'Templates' (which is circled in red), and 'Reports'. The 'Templates' tab is selected, showing a list of templates. The templates listed are: July 23, 2023, July 30, 2023, and August 6, 2023. Each template has a 'Matrix' and 'Settings' button.

1. Hit Templates tab and select a week

This screenshot shows the 'Templates' tab selected for the 'Sunday Morning' service type. The interface includes a top navigation bar with 'Crossroads Church', 'Sunday Morning', 'Actions', and a 'Templates' tab (which is highlighted in green). Below the navigation is a table of weekly templates. The table has columns for NAME, ITEMS, TEAMS, NOTES, UPDATED AT, and CREATED AT. The templates listed are: Week 1 (7 items, 10 teams, 0 notes, Jul 19 2023, Nov 30 2022), Week 2 (7 items, 3 teams, 0 notes, Jul 19 2023, Nov 30 2022), Week 3 (8 items, 3 teams, 0 notes, Jul 19 2023, Nov 30 2022), Week 4 (8 items, 3 teams, 0 notes, Jul 19 2023, Nov 30 2022), and Week 5 (6 items, 3 teams, 0 notes, Jul 19 2023, Nov 30 2022). Each template has a 'Matrix' and 'Settings' button.

2. Go to Actions and select Needed Positions

Crossroads Church Sunday Morning
Week 1

Notes Add Order Teams hit needed positions to add the team/classroom and increase the number of needed positions

MY TEAMS

Worship Team	Media	Kindergarten	Elementary	OTHER TEAMS
0 0 12	0 0 4	0 0 1	0 0 1	Safety Team
ACOUSTIC	CAMERA	CLASS LEADERS	CLASS LEADER	SAFETY TEAM MEMBER
1 Needed	1 Needed	1 Needed	1 Needed	1 Needed
AUDITIONING	CAMERA- TRAINEE	CAMERA- TRAINEE	CAMERA- TRAINEE	TEEN HELPER
1 Needed	1 Needed	1 Needed	1 Needed	2 Needed
BASS	SWITCHER TRAINEE	SWITCHER TRAINEE	SWITCHER TRAINEE	
1 Needed	1 Needed	1 Needed	1 Needed	
COMPUTER LYRICS	VIDEO SWITCHER	VIDEO SWITCHER	VIDEO SWITCHER	

Actions Team actions

- Add People
- Import Template
- Needed Positions 3
- Bulk Edit
- Manage Teams
- TEEN HELPER

3. Increase any needed positions from 0 to 1 (or however many people you need for that position)

Toddlers

0 0 1

CLASS LEADER

1 Needed - 1 +

TEEN HELPER

0 Needed - 0 +

Pre-school

0 0 1

CLASS LEADER

0 Needed - 0 +

TEEN HELPER

1 Needed - 1 +

4. Click on the word “needed” to add a person and select the person from the right-hand side to fill that position

Pre-school

0 0 2

CLASS LEADER

1 Needed - 1 +

TEEN HELPER

1 Needed - 1 +

Children's ... 8:15am

0 0 0

MANNED KIOSK

0 Needed -

All positions filled

Team Member Guest

Search

NAME

NO CONFLICTS

Sarah Schweihsberger

Eileen Burgess

Assign new person to Class Leader

Search by name, tag, or position

or auto-assign members from usage

FYI with templates:

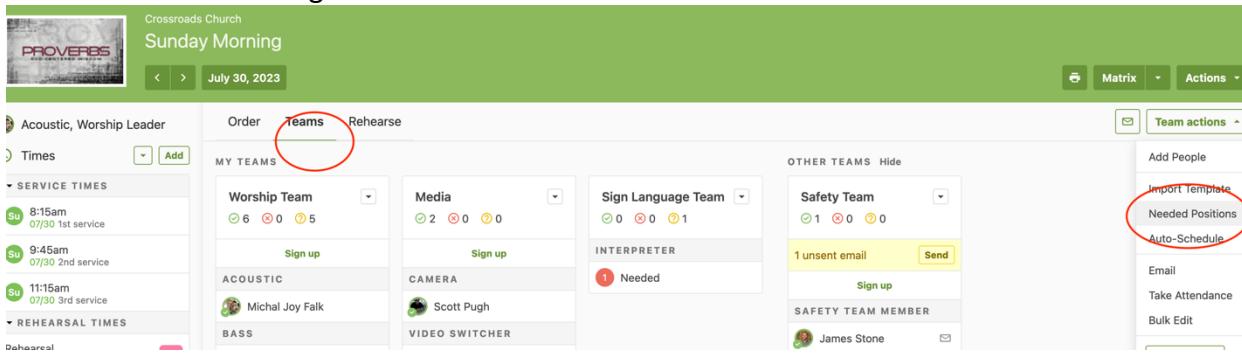
- Because this was created in templates... Sarah filled the position of pre-school class leader on Week 1 and she will automatically be filled in that position whenever a new month is added to the schedule for each week 1.
- You cannot send a notification through a template. Notifications are done in individual schedules under the plans tab and service type

To schedule individuals per date instead of an automatic template:

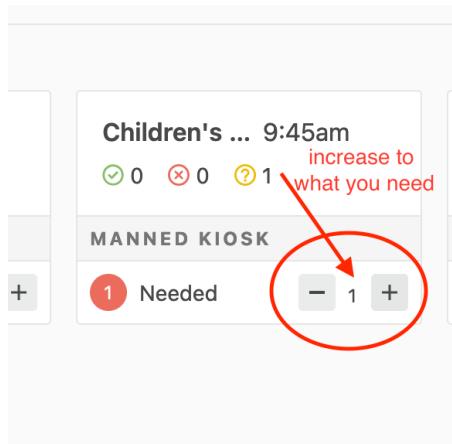
1. Go to Plans
2. Click on your designated service type and date

SERIES	UPCOMING	TITLE	LAST UPDATED
	July 23, 2023		30 minutes ago Leader Doe
	July 30, 2023		a day ago Michal Joy Falk
	August 6, 2023	30th Anniversary	21 hours ago Michal Joy Falk
	August 13, 2023		a day ago Michal Joy Falk
	August 20, 2023		20 hours ago Michal Joy Falk
	August 27, 2023		a day ago Michal Joy Falk

3. You'll see order (ignore), **teams**, and rehearse (ignore)
 - a. If your team is not listed here- click on "Needed Positions" under "Team Actions" on the right side of the screen

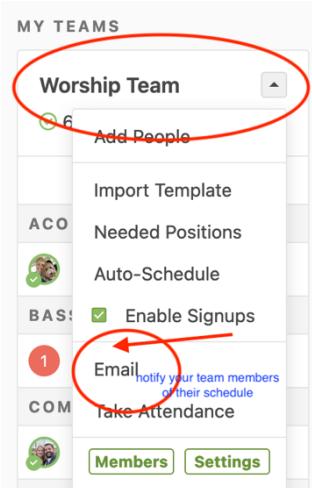


The screenshot shows the ChurchTrac software interface for a service titled "Sunday Morning" on "July 30, 2023". The "Teams" tab is selected. On the left, there are dropdown menus for "Acoustic, Worship Leader" and "Times". The "Times" dropdown shows "8:15am 07/30 1st service", "9:45am 07/30 2nd service", and "11:15am 07/30 3rd service". The "Teams" tab is highlighted with a red circle. The "Team Actions" menu on the right is also circled in red and includes options like "Import Template", "Needed Positions", and "Auto-Schedule". The main area displays "MY TEAMS" and "OTHER TEAMS". Under "MY TEAMS", there are sections for "Worship Team", "Media", "Sign Language Team", and "INTERPRETER". The "Worship Team" section shows counts of 6, 0, and 5. The "Media" section shows counts of 2, 0, and 0. The "Sign Language Team" section shows counts of 0, 0, and 1. The "INTERPRETER" section shows a "Needed" status. Under "OTHER TEAMS", there is a "Safety Team" section with a "1 unsent email" message and a "Send" button, and a "SAFETY TEAM MEMBER" section with a "James Stone" entry.



b. You'll find your team and positions, click on that position and on the right-hand side will be those people you've already designated in that position to assign them to that schedule (yellow box indicates a conflict that they are already scheduled, a red box indicates that they have blocked out that particular date)

[reminder- position and members were done under the people tab in your team]



c. Hit the arrow next to your team name to send an email and app notification. These volunteer will receive this in an email and as a notification within the app that they have been scheduled or a sign-up is available.

d. To see multiple weeks in one view, use the matrix to designate your weeks and schedule a full month at a time.

Sunday Morning		UPCOMING	TITLE	LAST UPDATED	Matrix
SERIES	PROVERBS	July 23, 2023		2 hours ago Leader Doe	
		July 30, 2023		an hour ago Michal Joy Falk	

Sunday Morning Jul 16 - Aug 13

Sunday Morning July 16, 2023	Sunday Morning July 23, 2023	Sunday Morning July 30, 2023	Sunday Morning August 6, 2023	Sunday Morning August 13, 2023
Worship Team				
Drums	Wesley Myers	Cam Collins	Wesley Myers	Cam Collins
Electric	Cory Collins	Needed	Needed	Cory Collins
Lights	Michal Joy Falk	Michal Joy Falk	Leader Doe	Needed
Sound	Joe Stone	Matthew Riffel	Joe Stone	Joe Stone
Synth	Cory Collins	Jennifer Lee	Needed	Jennifer Lee
Vocal- harmony	Dwight Beguin	Sarah Stone	Michael Miller	Dwight Beguin
Vocal- melody	Needed	Needed	Needed	Needed
Worship Leader	Michal Joy Falk	Cory Collins	Michal Joy Falk	Michal Joy Falk
Safety Team				
Media				
2s & 3s				
Class Leader	Needed			
Teen Helper	Needed			
Infants				
Class Leader	Needed			
Teen Helper	Needed			
Toddlers				

To only see your team(s), use the left-hand side to minimize the order and other teams so you can focus on your own team(s)

Times

▼ SERVICE TIMES

Su 8:15am 07/30 1st service

Su 9:45am 07/30 2nd service

Su 11:15am 07/30 3rd service

▼ REHEARSAL TIMES

e. **Times:** (left-hand side)- select service times, choose your ministry team and select a reminder (this goes out as an email, text and app notification)

Edit Time

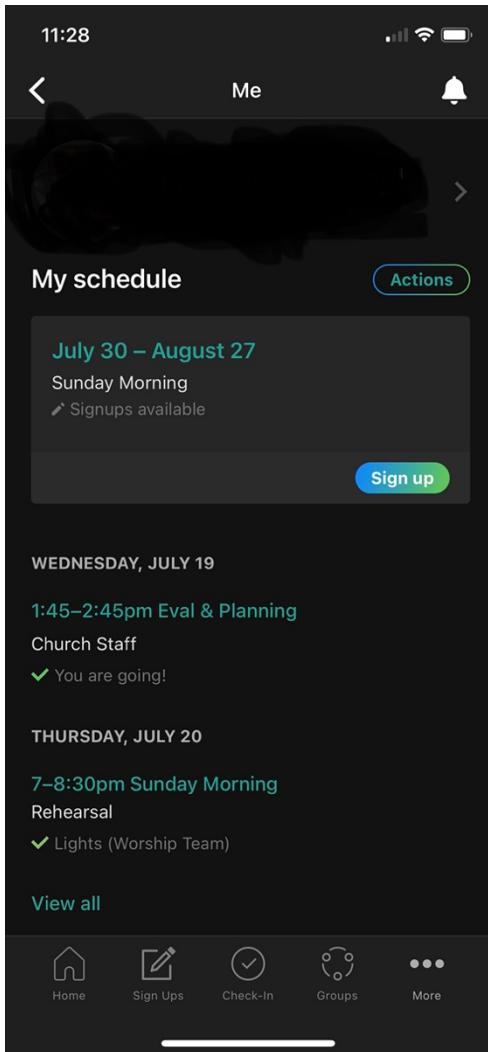
Service Rehearsal Other

1st service 08:15 AM to 09:25 AM SUN July 30, 2023

Assigned Teams 13/13 Reminders go out at 10:00am

Worship Team	No Reminder
Safety Team	No Reminder
Media	2 days before on Fri 7/28
2s & 3s	No Reminder
Infants	No Reminder
Toddlers	No Reminder
Pre-school	No Reminder
Kindergarten	No Reminder
Elementary	No Reminder
Friends of Jesus- Sunday	No Reminder
Special Buddies	No Reminder

2s & 3s	No Reminder
Infants	No Reminder
Toddlers	No Reminder
Pre-school	No Reminder
Kindergarten	No Reminder
Elementary	No Reminder
Friends of Jesus- Sunday	No Reminder
Special Buddies	No Reminder
Sign Language Team	No Reminder



What does my volunteer see?

Your volunteer has access to PCO services. This means they can use it on the web, they can use the services app OR, they can just use the church app (church center) by visiting the ME page (clicking on their profile picture)

Under their name there is 'My Schedule'

Based on your team's settings...

- they can either sign-up to serve in this section OR see the dates they've been assigned and confirm or decline.
- they can add blockout dates under the Actions button to communicate when a volunteer is unable to serve
- they can email the team leader under the Actions button as well

Optional Feature: Services App

This is a nice feature if you don't have access to a computer or need to make a change sooner than later, or if you just prefer to use your phone over a computer.

1. Find the app Planning Center Services on your device's store
2. Open the app (green box with three white lines)
3. Sign in using your same email/username and password as your PCO web sign on information.
4. Menu options are the same as web version: schedule, plans, songs, media, & people
5. Each menu option works the same as what is on the web version
Ex: hit plans, select your date/week, see all your teams and positions and click on those to add a person to that position.