

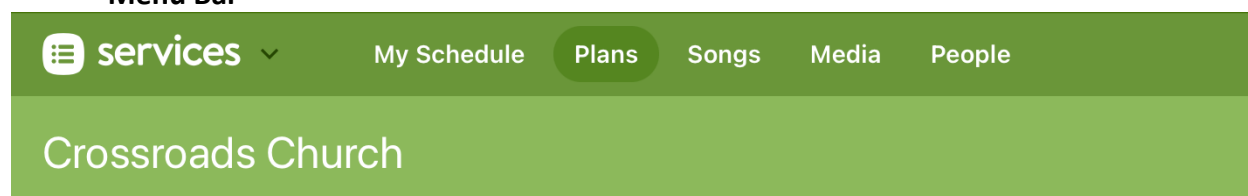
PCO Services Modules

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)

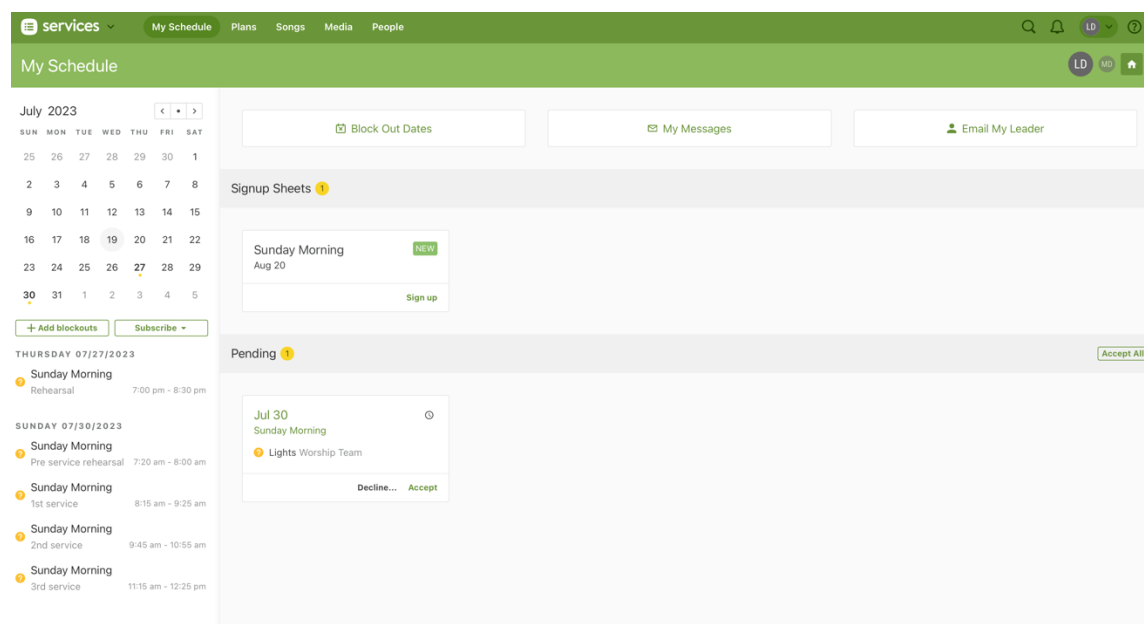
Menu Bar



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

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



- 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

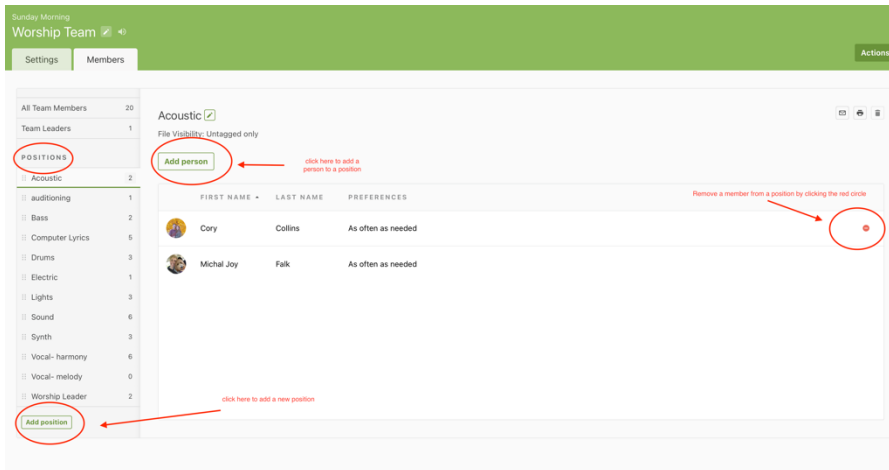
FIRST NAME	LAST NAME	EMAIL ADDRESS	PHONE NUMBER	PERMISSIONS (HIGHEST)	LAST SCHEDULED PLAN	LAST LOGIN	LAST SET BLOCKOUTS	CR
Aaron	Mondy			Viewer	Aug 20, 2023	Jul 18, 2023 9:58 PM	May 1, 2023 5:11 PM	Apr 26,
AK	Abby	Krynock		Scheduled Viewer				Jul 18, 2
AM	Abigail	McInnis		Scheduled Viewer				Jul 17, 2
AD	Aleshcha	DeWitt		Scheduled Viewer				Jul 18, 2
AK	Allison	Kaiser		Scheduler				Jun 5, 2
AF	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	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



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

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 scheduling interface. On the left, there is a calendar for July 2023. The main area displays 'Service Types' with a list of services: Dive student ministry & Fuse, First Impressions Team, Friends of Jesus- Wednesday Night, and The Access Coffee Shop. Below these, there is a section for 'Sunday Morning' with a table of upcoming events. The table has columns for 'SERIES', 'UPCOMING', 'TITLE', and 'LAST UPDATED'. The events listed are for July 23, 2023, July 30, 2023, August 6, 2023, August 13, 2023, and August 20, 2023. The 'LAST UPDATED' column shows the time and user for each update.

SERIES	UPCOMING	TITLE	LAST UPDATED
PROVERBS	July 23, 2023		20 hours ago Patty Choquette
	July 30, 2023		a day ago Michal Joy Falk
	August 6, 2023	30th Anniversary	21 hours ago Michal Joy Falk
	August 13, 2023		21 hours ago Michal Joy Falk
	August 20, 2023		20 hours ago Michal Joy Falk

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

This screenshot shows the 'Sunday Morning' service type settings. A red circle highlights the settings menu in the top right corner, which includes options for Settings, Teams, Templates, and Reports. The main table shows the 'UPCOMING' events for this service type.

SERIES	UPCOMING	TITLE	LAST UPDATED
PROVERBS	July 23, 2023		3 minutes ago Leader Doe
	July 30, 2023		a day ago Michal Joy Falk
	August 6, 2023	30th Anniversary	21 hours ago Michal Joy Falk

1. Hit Templates tab and select a week

The screenshot shows the 'Sunday Morning' Templates tab. It features a table with columns for NAME, ITEMS, TEAMS, NOTES, UPDATED AT, and CREATED AT. The table lists five weekly templates, each with a specific number of items and teams, and a creation date of Nov 30 2022.

NAME	ITEMS	TEAMS	NOTES	UPDATED AT	CREATED AT
Week 1	7	10	0	Jul 19 2023	Nov 30 2022
Week 2	7	3	0	Jul 19 2023	Nov 30 2022
Week 3	8	3	0	Jul 19 2023	Nov 30 2022
Week 4	8	3	0	Jul 19 2023	Nov 30 2022
Week 5	6	3	0	Jul 19 2023	Nov 30 2022

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 Actions

MY TEAMS

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

OTHER TEAMS Hide

Team actions

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

TEEN HELPER
2 Needed

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

Toddlers
0 0 0 1

CLASS LEADER
1 Needed - 1 +

TEEN HELPER
0 Needed - 0 +

Pre-school
0 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 0 2

CLASS LEADER
1 Needed - 1 +

TEEN HELPER
1 Needed - 1 +

Children's ... 8:15am
0 0 0 0

MANNED KIOSK
0 Needed -

All positions filled

Team Member Guest

Search

NAME

NO CONFLICTS

☒ Sarah Schweisberger

☐ 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

Sunday Morning			
Matrix			
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



Crossroads Church
Sunday Morning

< > July 30, 2023

Matrix Actions

Acoustic, Worship Leader

Order **Teams** Rehearse

Team actions

MY TEAMS

OTHER TEAMS Hide

Worship Team

Media

Sign Language Team

Safety Team

1 unsent email

Send

Sign up

SAFETY TEAM MEMBER

James Stone

Acoustic

Michal Joy Falk

BASS

CAMERA

Scott Pugh

VIDEO SWITCHER

Interpreter

Needed

Import Template

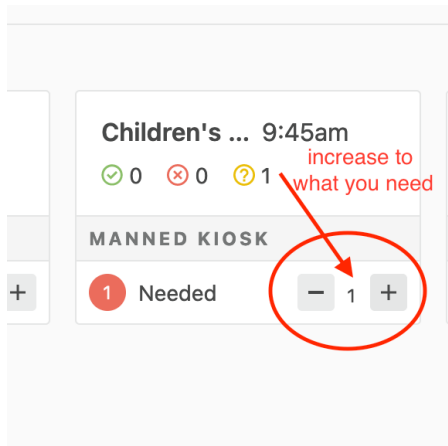
Needed Positions

Auto-Schedule

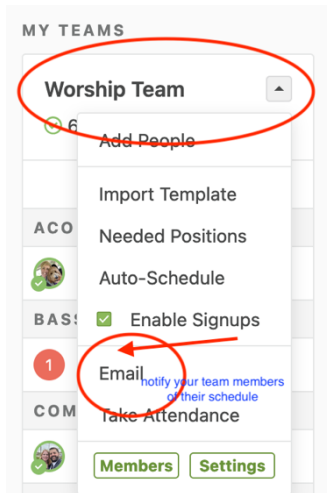
Email

Take Attendance

Bulk Edit



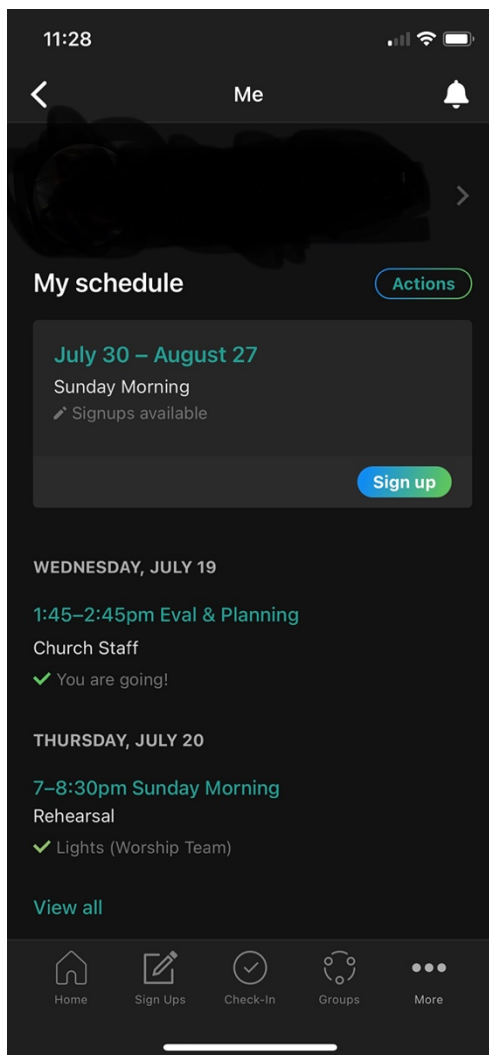
b. You'll find your team and positions, click on that position and on the right-hand side will be those people you've already designated in that position to assign them to that schedule (yellow box indicates a conflict that they are already scheduled, a red box indicates that they have blocked out that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





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.