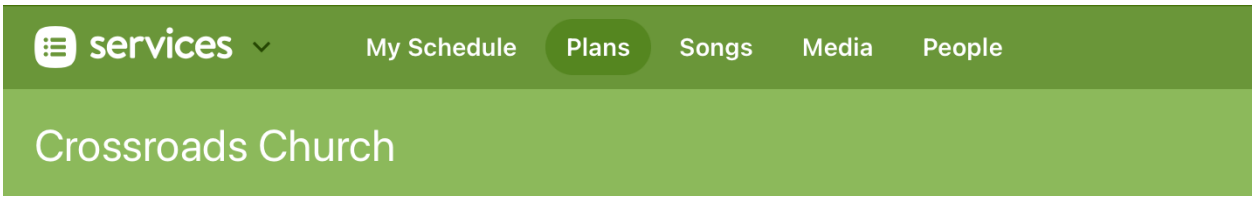
PCO Services Modules

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)

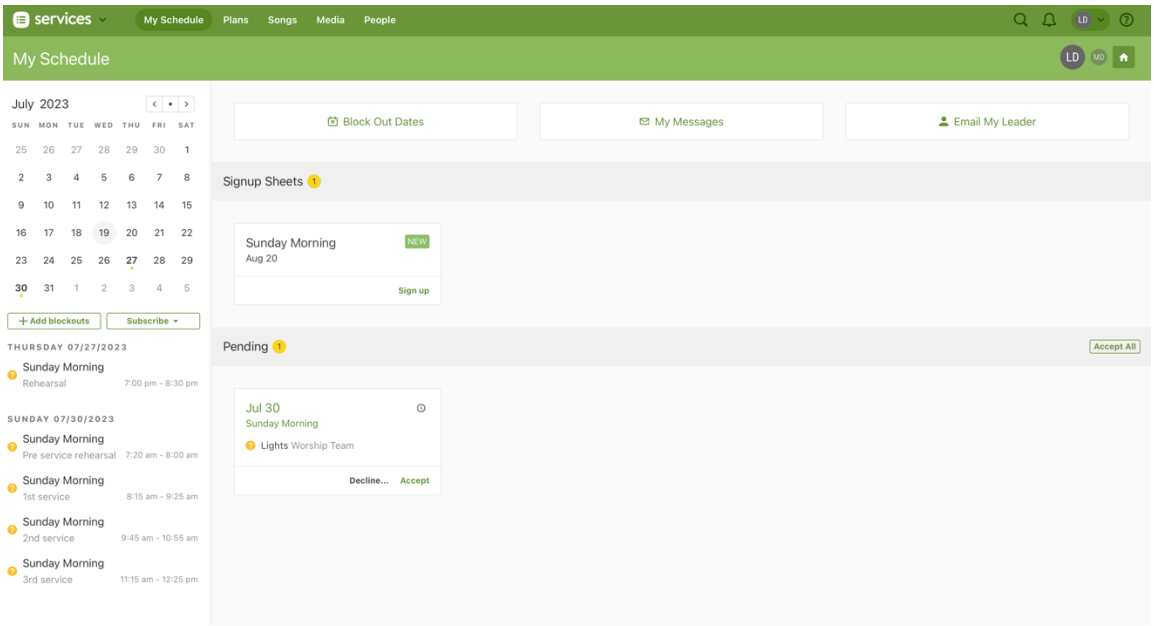
Menu Bar



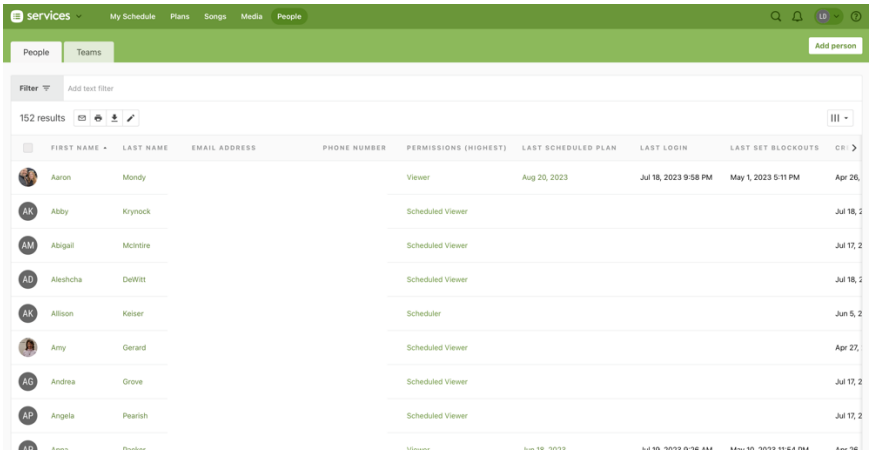
A. My Schedules:

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

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)

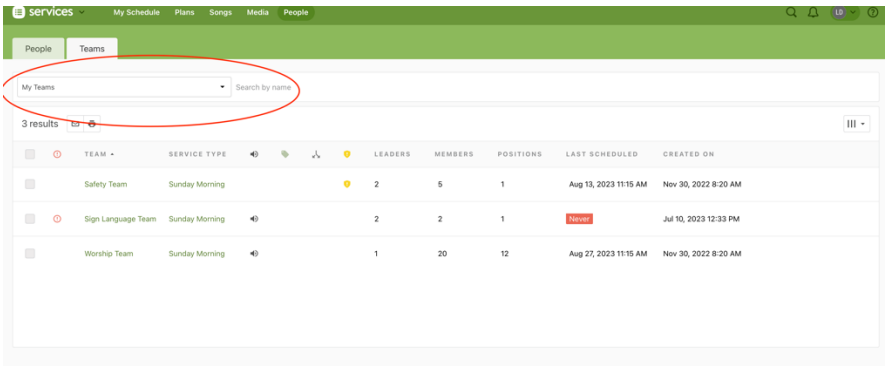


B. Plans- this is where scheduling is done per plan (more instructions below)
C. Songs- all song library (only worship teams)
D. Media- where pictures, videos, etc. used in plans is uploaded (only worship teams)
E. People- where you'll find the various teams and volunteers used on Sundays

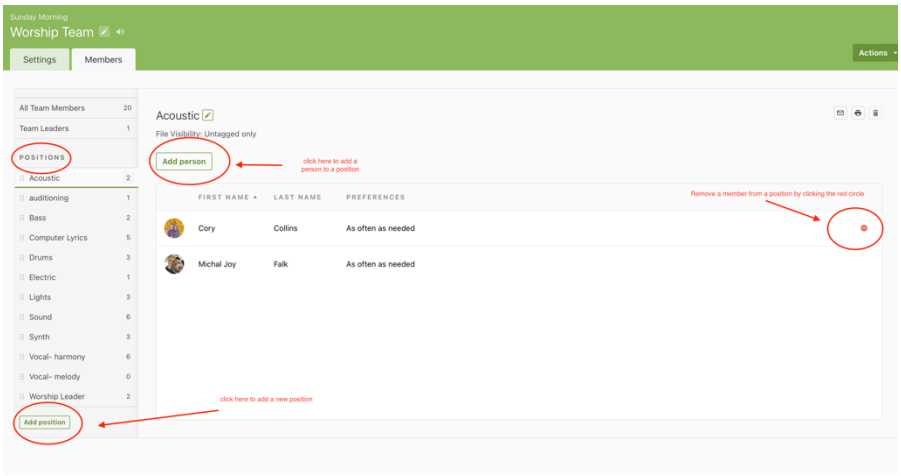


a. Click on certain people to email them in this module

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]



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:

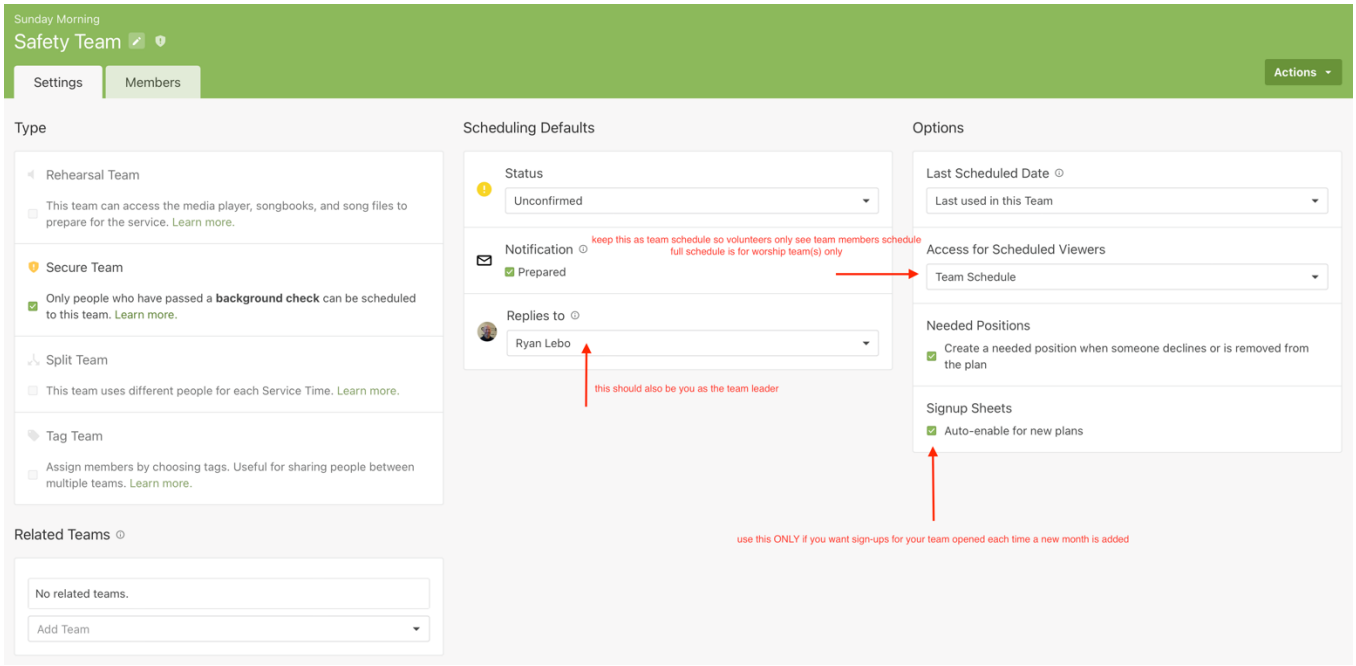
Select your team type:

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)

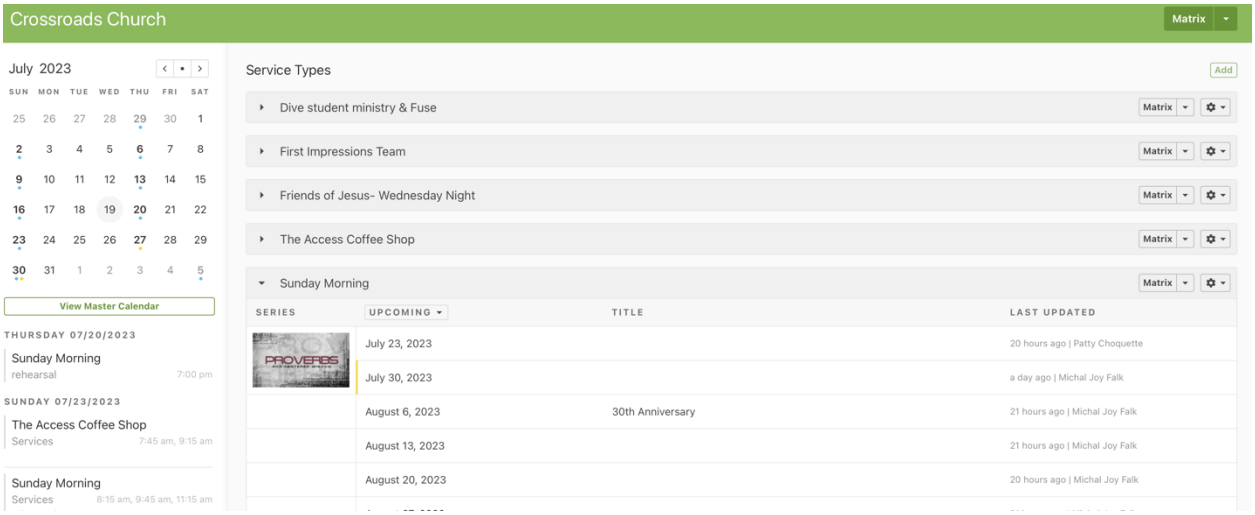
You'll see the various service types:

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

Good Friday Service Plan- designated to just Friday

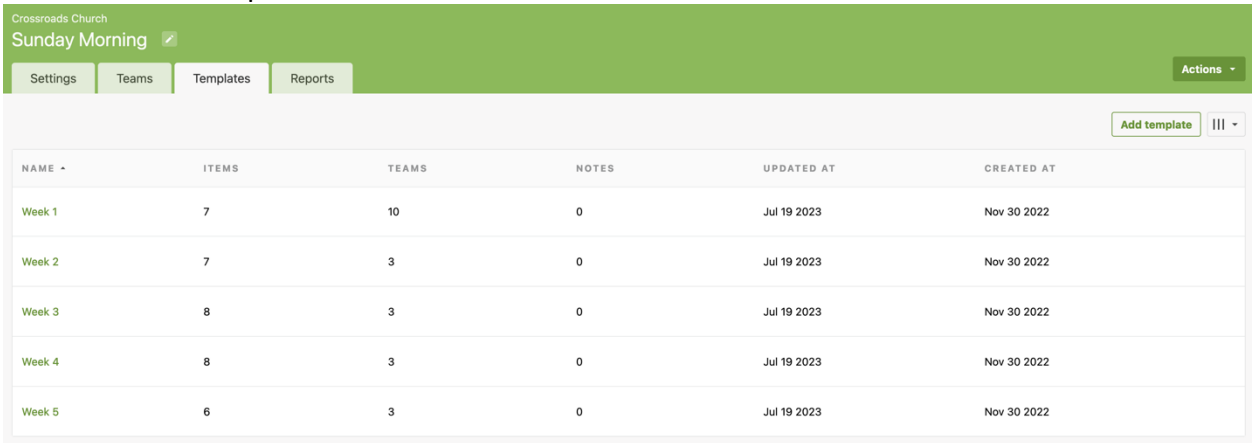
Sunday morning Plan- designated to just Sunday morning

Dive Student Ministry- designated to Sunday nights



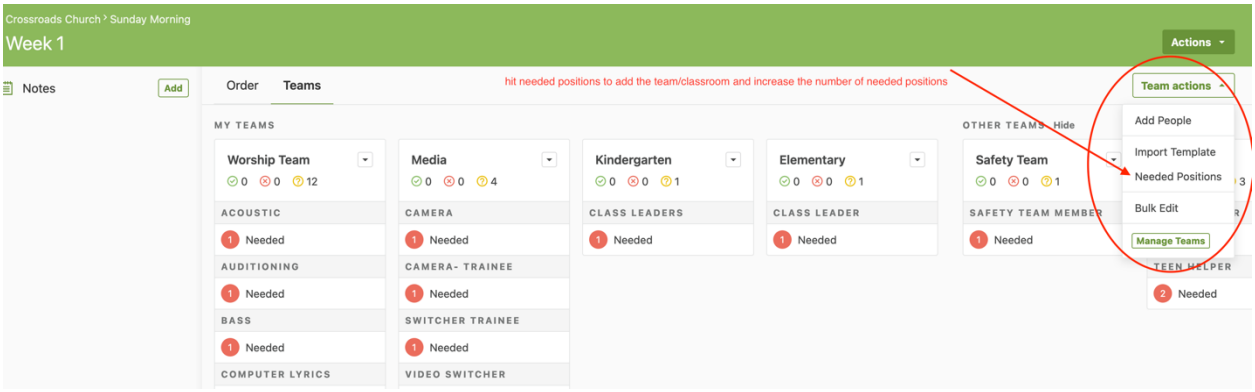
To schedule individuals through a repeated template hit the cog in the right-hand corner

1. Hit Templates tab and select a week

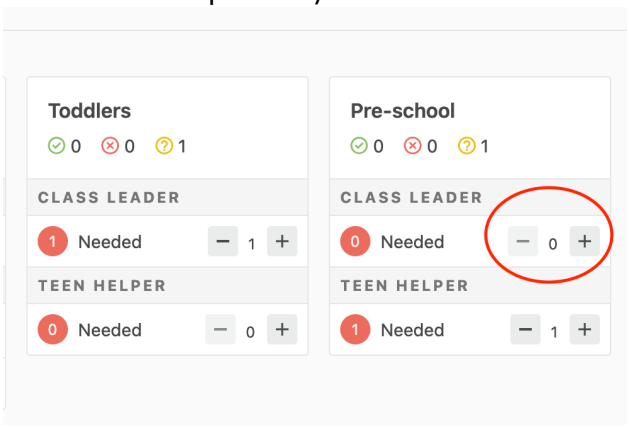


NAME	ITEMS	TEAMS	NOTES	UPDATED AT	CREATED AT
Week 1	7	10	0	Jul 19 2023	Nov 30 2022
Week 2	7	3	0	Jul 19 2023	Nov 30 2022
Week 3	8	3	0	Jul 19 2023	Nov 30 2022
Week 4	8	3	0	Jul 19 2023	Nov 30 2022
Week 5	6	3	0	Jul 19 2023	Nov 30 2022

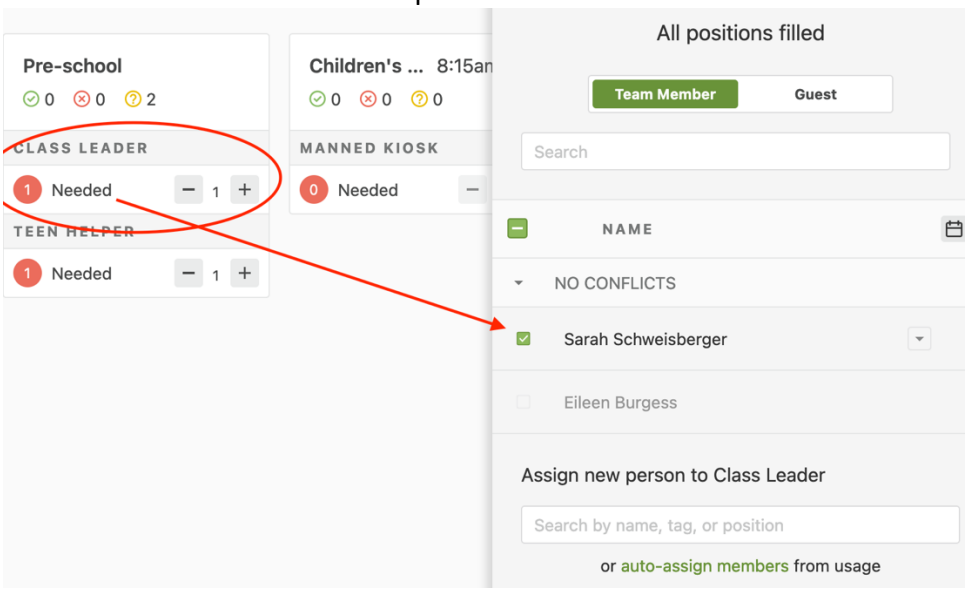
2. Go to Actions and select Needed Positions



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



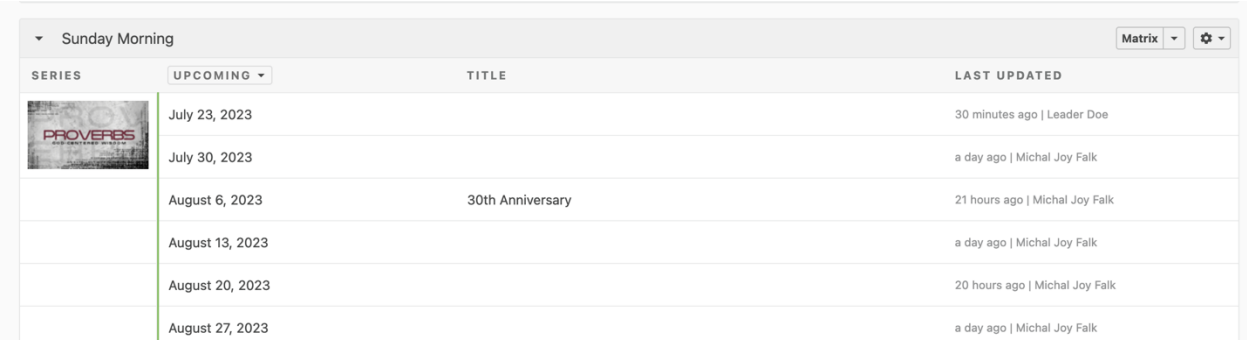
4. Click on the word “needed” to add a person and select the person from the right-hand side to fill that position



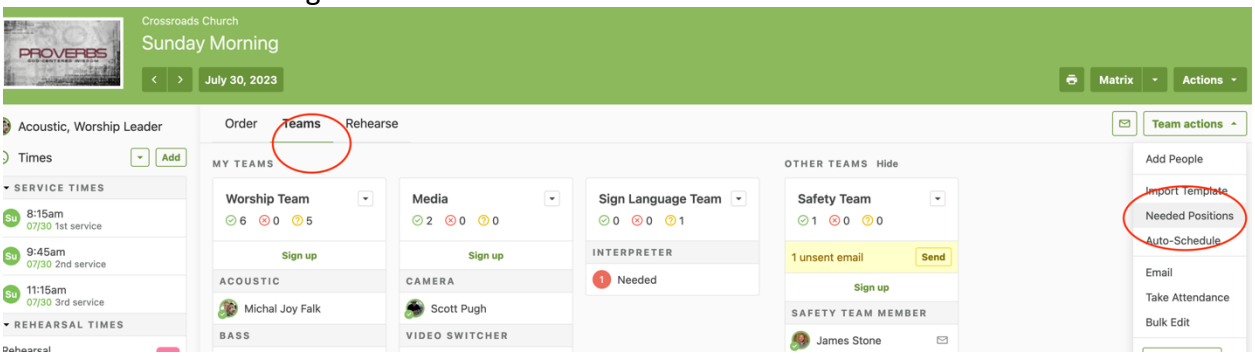
FYI with templates:
-Because this was created in templates… Sarah filled the position of pre-school class leader on Week 1 and she will automatically be filled in that position whenever a new month is added to the schedule for each week 1.
-You cannot send a notification through a template. Notifications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

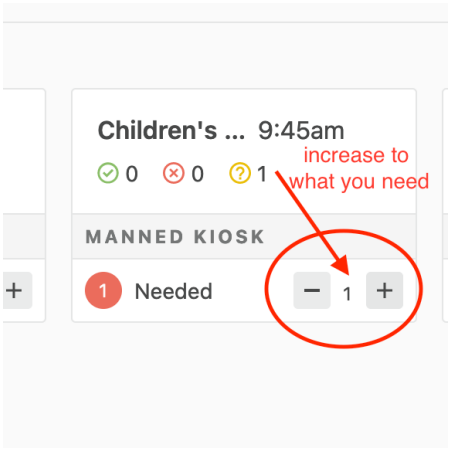
To schedule individuals per date instead of an automatic template:

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

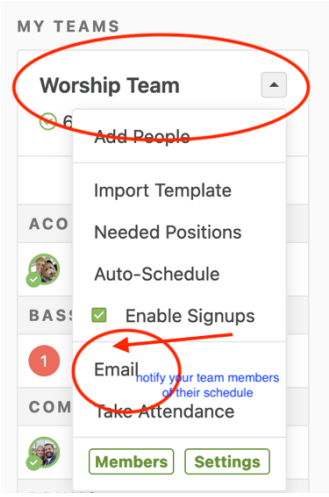


3. You'll see order (ignore), **teams**, and rehearse (ignore)
    a. If your team is not listed here- click on "Needed Positions" under "Team Actions" on the right side of the screen



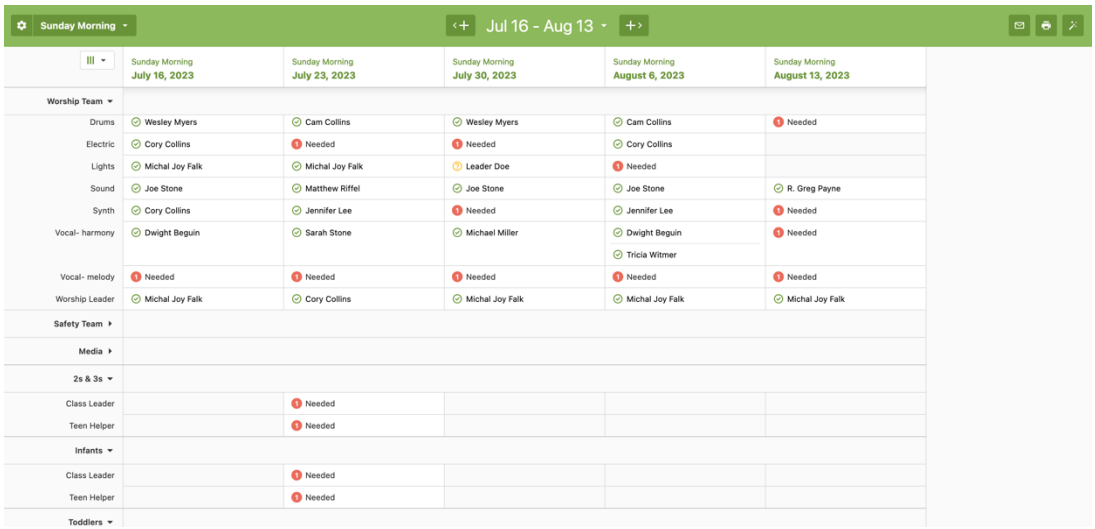


b. You'll find your team and positions, click on that position and on the right-hand side will be those people you've already designated in that position to assign them to that schedule (yellow box indicates a conflict that they are already scheduled, a red box indicates that they have blocked out that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

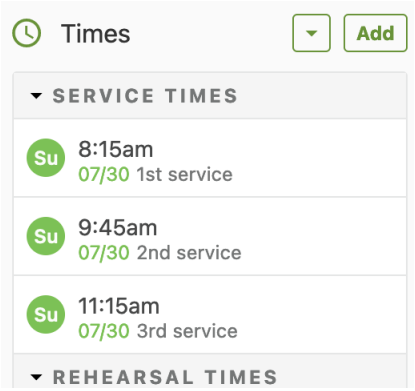


c. Hit the arrow next to your team name to send an email and app notification. These volunteer will receive this in an email and as a notification within the app that they have been scheduled or a sign-up is available.

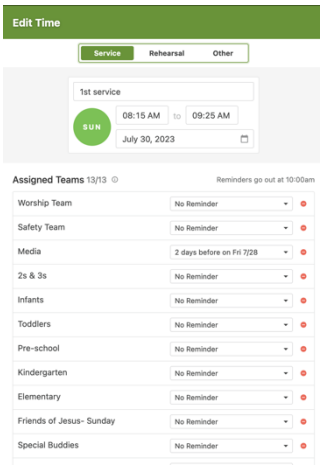
d. To see multiple weeks in one view, use the matrix to designate your weeks and schedule a full month at a time.

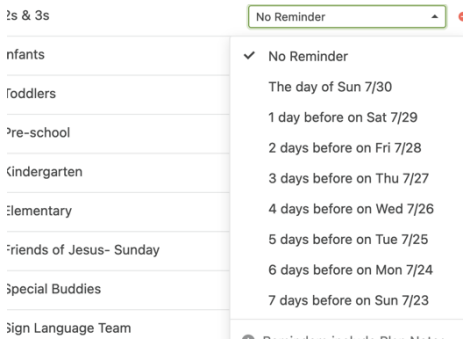


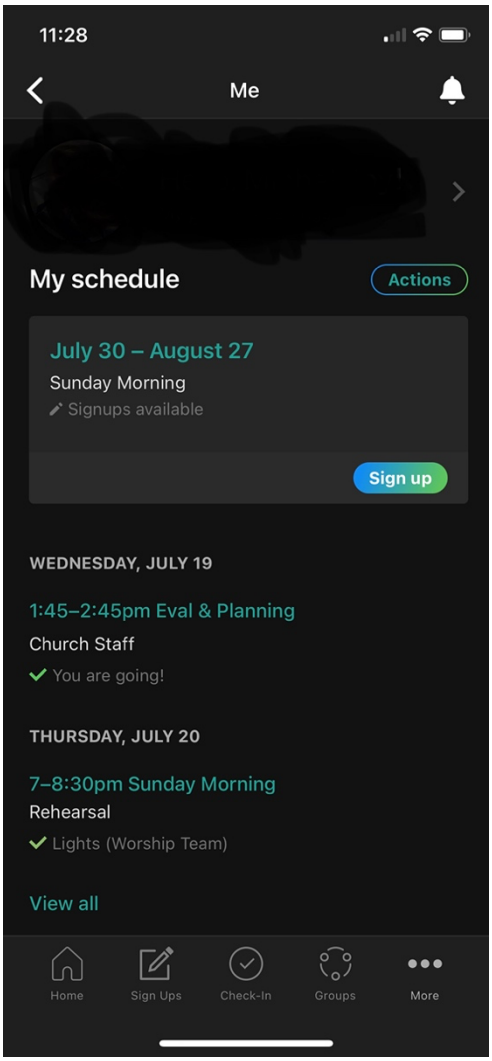
To only see your team(s), use the left-hand side to minimize the order and other teams so you can focus on your own team(s)



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)







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.