# Planning Center Modules | Overview & Roles

## **SERVICES**

Plan and coordinate worship services and schedule teams.

#### Leaders/Volunteers:

- o Confirm or decline scheduling requests.
- View service plans, rehearsal notes, and setlists.
- Rehearse using chord charts, MP3s, and arrangements.
- Manage teams, positions, and templates. (Team Leaders Only)

#### Team Leaders & Admins:

- Build service plans and schedules. (admins-only)
- Upload media and manage file permissions. (admins-only)
- o Manage teams, positions, and templates.

# **PEOPLE**

Centralized database of ALL people in our church – syncs across ALL modules.

### Leaders/Volunteers:

- View or update limited contact info for people.
- Use notes and workflows assigned to them.

#### Admins:

- Maintain records, tags, workflows, and custom fields.
- Manage permissions across modules.
- Handle data imports/exports and household management.
  - Note: Anyone in our church can update their own profile/household, using the Church Center app.

# **CHECK-INS**

Securely check people into events, especially children's ministry or classes.

#### Leaders/Volunteers:

- Assist with check-in at kiosks or mobile devices.
- Monitor check-in stations and help troubleshoot onsite.

#### Admins:

- Set up locations, labels, schedules, and station types.
- Generate attendance reports.
- Maintain hardware (label printers, kiosks, etc.).

# **GROUPS**

Organize and manage small groups, classes, or teams.

Leaders/Volunteers:

- o Communicate with group members.
- Track attendance. (Group Leaders only)
- o Post resources or event info for the group. (Group Leaders only)

#### Admins:

- Set up group types, visibilities, and leader permissions.
- Assist with group placement or sign-up forms.
- o Handle any tech issues or permissions conflicts.

## **REGISTRATIONS**

Create and manage sign-ups for events, retreats, and conferences. Also create an awareness page for an event that <u>does not</u> require registration, but open to anyone to attend.

### Leaders/Volunteers:

- o Promote events and encourage sign-ups.
- View or download attendee lists.
- Communicate basic event details.

#### Admins:

- Create registration pages
- o forms, and pricing structures.
- Manage payments, refunds, discounts, and add-ons.
- Make changes to existing events, add-ons, selection types, etc.
- Answer questions and provide tech support relating to an event/registration.

### \*Note For Registrations:

If your event only applies to **one campus**, please contact **your campus rep**. first to have the registration page created. For events open to **all or multiple campuses**, contact **support@ithrivechurch.com** for assistance in getting your event created/setup.

Events <u>MUST</u> be approved via the <u>event request form</u> prior to a registration page being
Created. — \*\*\*NOT NEEDED FOR PRE-ESTABLISHED/ANNUALLY REOCCURRING MINISTRY EVENTS.

## **CALENDAR**

Facility and event scheduling across rooms and resources.

### Leaders/Volunteers:

- Submit event or room requests (if enabled).
- View scheduled events and facility use.

### Admins/Campus Reps:

- Add events to Calendar
- Assign tags, categories, and calendar views.
- Approve room/resource requests. (admins-only)
- Manage location setup, conflict resolution, and notifications. (admins-only)

# **PUBLISHING**

Public-facing content—custom church app, website features, sermon media, and announcements.

### • Leaders/Volunteers:

- Submit content like announcements, blog posts, or sermon notes.
- View public-facing content. (can be found through the **Church Center App** or online)

#### Admins:

- Build and maintain church app/web content.
- Moderate submissions and schedule content.
- Design layout, link modules, and publish media.

# **Summary of Roles:**

A quick-reference for all modules and roles can be found below

Module	Leaders/Volunteers	Admins
Services	View plans, confirm scheduling, rehearse	Build plans, schedule teams, upload media
People	View/update personal/group info	Manage profiles, tags, workflows, permissions
Check-Ins	Operate stations, assist with check-in	Set up stations, labels, generate reports
Groups	Communicate, track attendance	Set up groups, manage access, permissions, and forms
Registrations	Promote events, view registrants	Build forms, handle payments/refunds/support
Calendar	N/A	Approve events, manage conflicts/schedules

### **HELPFUL LINKS:**

- 1. Planning Center Online (PCO) Access all modules from your PCO dashboard!
- 2. PCO Training Sessions All of our Team training sessions in one place.
- 3. <u>Download link for Church Center (available for all smart devices)</u>
- 4. Planning Center University (PCU) One place to learn all things PCO!

### FREQUENTLY ASKED QUESTIONS (FAQs):

### 1. What's the difference between Planning Center and Church Center?

a. Planning Center is the backend tool for church staff and volunteers, while Church Center is the *church-facing* app and website where congregants engage with things like events, giving, and groups.

### 2. Can I download a "desktop version" of Church Center?

a. Church Center is not available as a desktop app, but instead, has been built into portions of our website at ithrivechurch.com.