



GROUP LEADER

INSTRUCTIONS

*These instructions are for utilizing PCO Groups from a computer and from the Church Center mobile app. You will have much greater accessibility and editability from a computer. Each section will specify which things you can and can't do from a computer or from the app.

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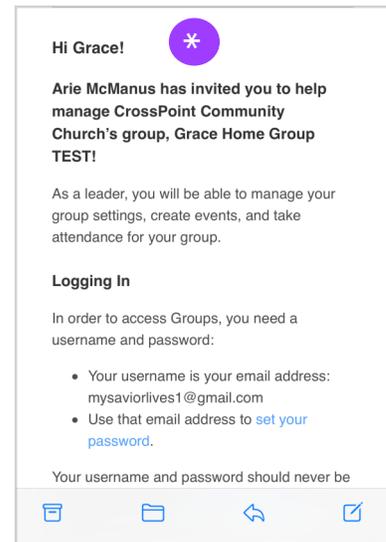
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LOGGING IN

FROM A COMPUTER

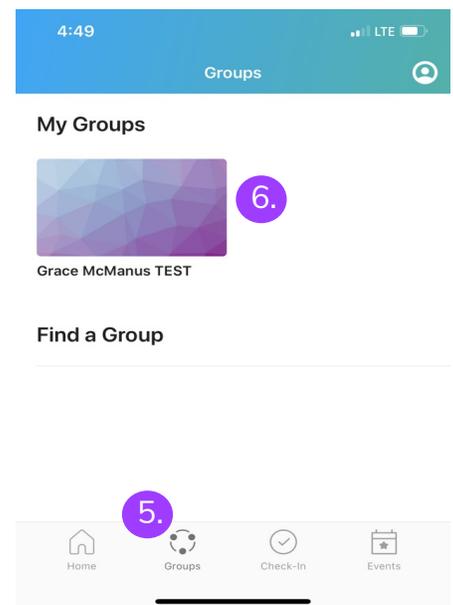
1. Go to groups.planningcenteronline.com and click “Log in.”
2. Use the email and password you set to log in.

* When you get added as a group leader, you will receive a Welcome email from CrossPoint with a link to set your username and password. If you don't have that email or need to reset your password, contact a CrossPoint admin or go to the log in page and click “Need a Password?”



FROM THE MOBILE APP

1. Download the Church Center app from the App Store or Google Play store.
2. Open the app and click “Log in.”
3. Enter your phone number (or click “Use email instead” and enter your email). Then click “Next.”
4. You will receive a 6 digit code via text or email. Enter that into the next screen on the app.
5. Once logged in, click the “Groups” icon at the bottom of your screen.
6. Select your group.



SUPPORT

Have a question specific to Planning Center and/or Groups? **From a computer**, PCO has two awesome ways to help you.

From anywhere within Groups, click the  icon at the top right of the screen. In the box that pops up, you can:

1. Browse the PCO Groups articles (in the “Suggested articles” or “Ask a question” section).
2. Contact support by clicking “Open a ticket” and filling out their Help & Support form.

PCO GROUPS: BASICS

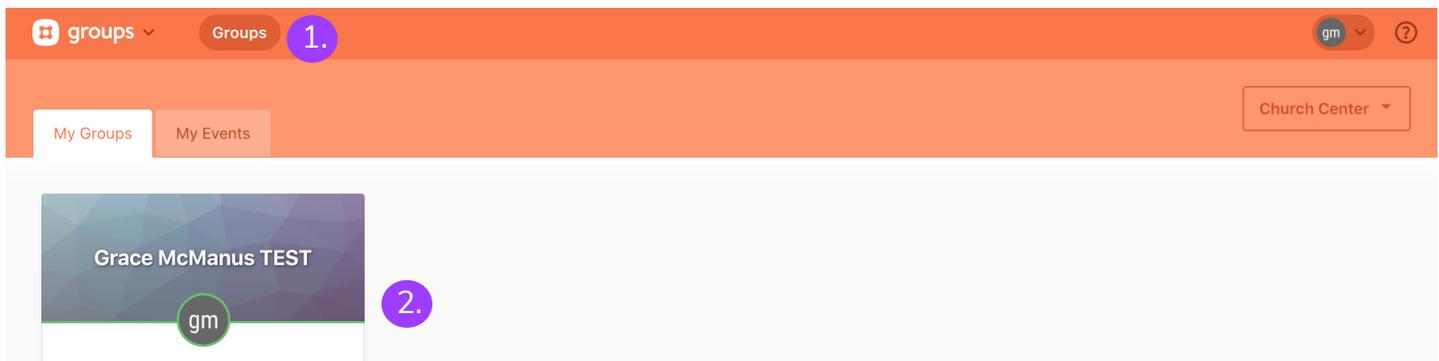
- **Group Types** are multiple groups that have a common purpose and similar settings.
- A **Group** is one group within a particular group type.
- **Tags** are like filters for a group. They add additional information and make it easy for guests to find a group that best fits them. A group can have multiple tags telling when they meet, if childcare is offered, frequency, discussion, etc.

HOW TO: VIEW YOUR GROUP

To view your group, who is in it, accept a request to join, add or delete someone, adjust settings, and add event (meeting) dates.

FROM A COMPUTER

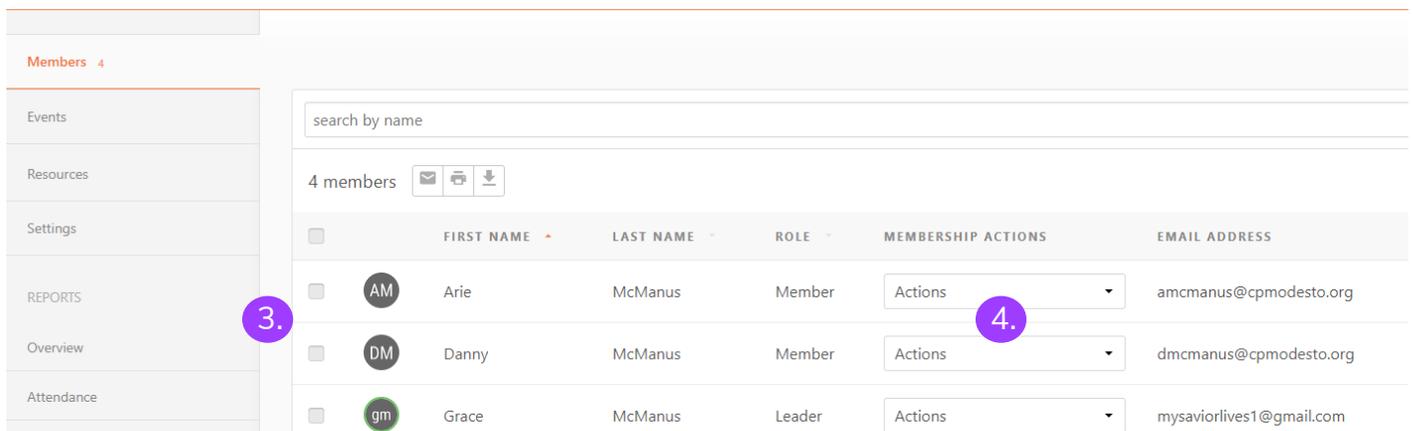
1. Click the **Groups** tab on the top left side.
2. Select your group.

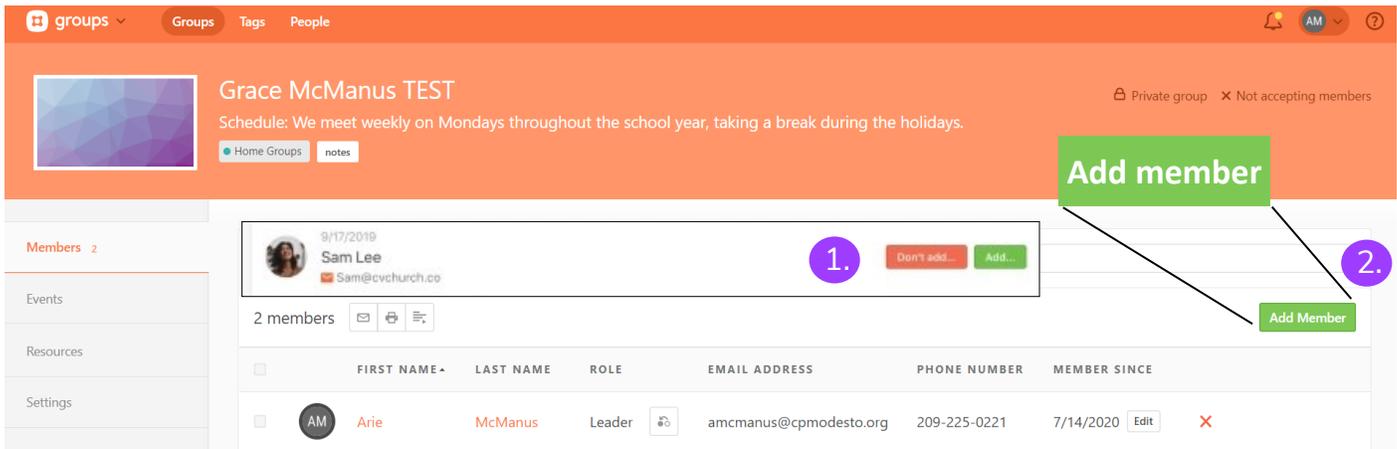


Members Tab

It will always open up to the **Members** Tab. From here, you can:

3. View each member and leader in your group, along with their contact info.
4. Change someone's membership (to adjust their membership date or remove them from the group).

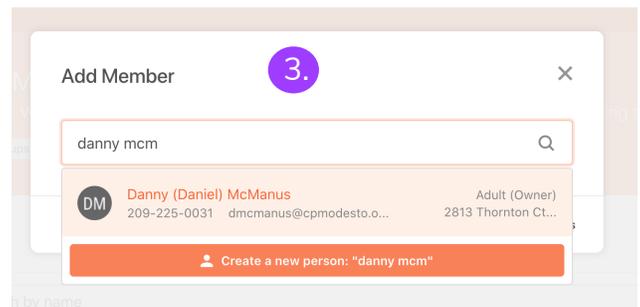




*****NOTE: If their name doesn't come up, ask the person to make sure that you have the correct spelling/spacing (i.e. McManus versus Mc Manus). If it is not exact, it will likely not find the person. Creating a new person, when they actually are already in the system, causes a lot of extra work for our admins to find and merge the duplicate record. It will also notify the person when you create their account. Do so cautiously!**

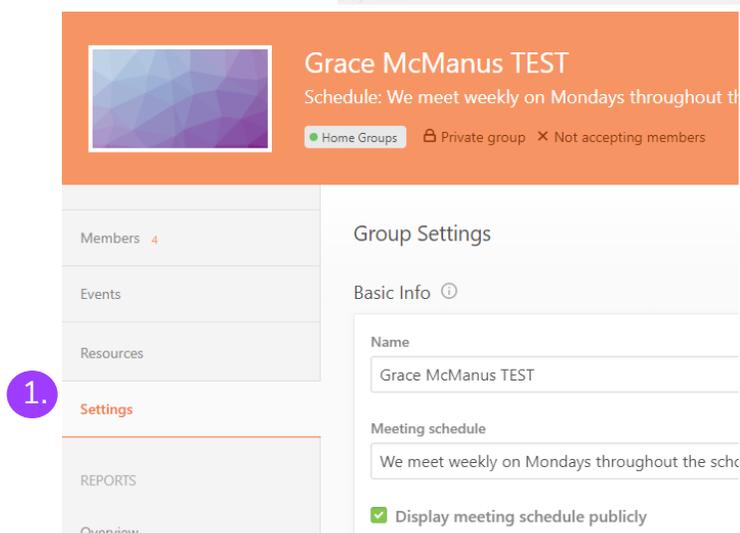
1. When someone requests to join your group, it will show up here, giving you the option to "Add" or "Don't add" them to your group (you will also receive an email).
2. If you need to manually add someone to your group, click "Add a member." Search for the person's name in the pop up box, then select it when it opens up. If they are not in the system, you can click "Create a new person." ***
- 3.

*You can also add someone while taking attendance. See attendance section below.



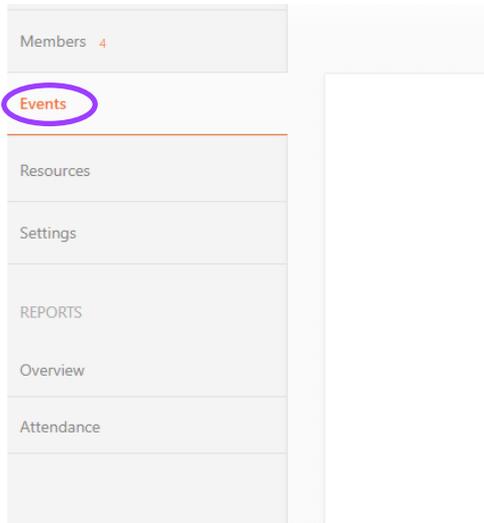
Settings Tab

1. Click the **Settings** tab to adjust any settings you'd like. Most are pre-set for you. However, if you need to change the location, adjust the description, change the contact email, etc. do so here.



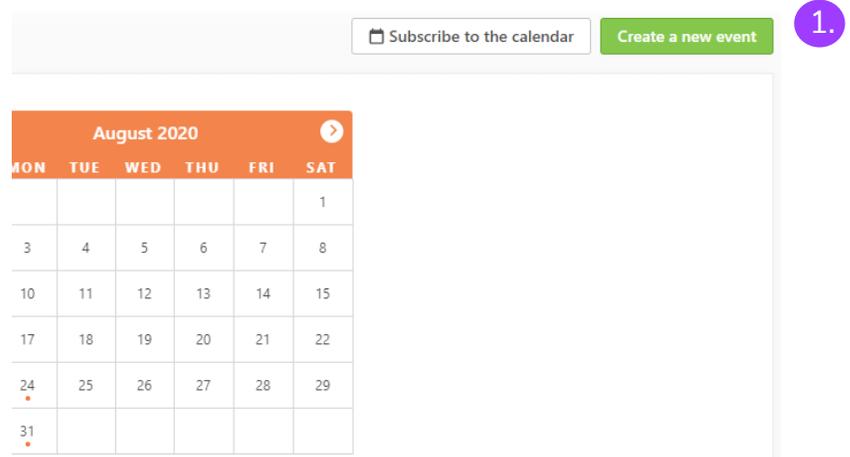
Events Tab

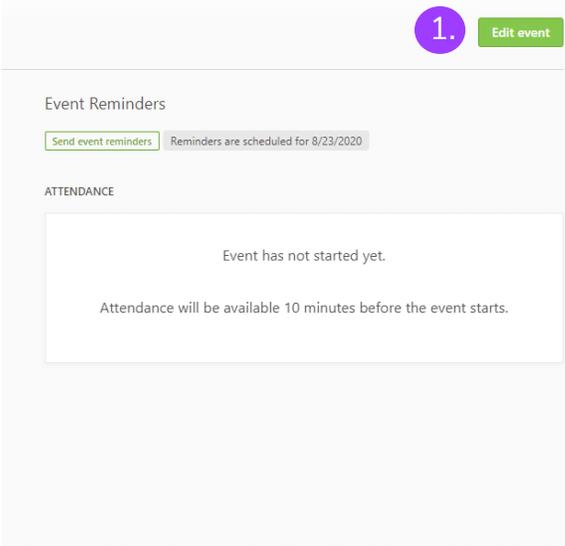
The **Events** tab is where your regular meetings are housed. Each regular meeting is a separate “event” that appears on the calendar. **We will have these set up for you, listed as one event that repeats (or separate events, if your group meets irregularly), one semester at a time. We will keep these set up for you as new semesters come.** However, if you need to create a new event (i.e. your group is having a one-time BBQ together), adjust your regular group meeting, or cancel an event, or you can do so.



To create a new event:

1. Click the green “Create a new event” box at the top right.
2. Fill in all details (name, date, start/end time, description, location). Click “Create event” when done.

A screenshot of the event details form. It includes fields for Event Name, Date (7/27/2020), Start time (2:00 pm), and End time (4:00 pm). There is a checkbox for 'This is a multi-day event' and a 'Repeat' dropdown menu set to 'Never'. A rich text editor is provided for the Description. The Location section has radio buttons for 'Physical address' (selected) and 'Virtual (link)'. A dropdown menu for 'Location' is set to 'McManus Home', with 'Modesto, CA' listed below it. At the bottom right, there is a green 'Create event' button (circled in purple with a '2' in a purple circle).



To edit an existing event:

1. Click on the event to open it up. Click the green “Edit event” box. Make your adjustments. Be sure to click “Save” at the bottom right when complete. If you’re editing a repeating event, it will ask you if you want to save it for just that event, or all future events. *

***Note:** This is a where you could add a location per event if your group rotates meeting locations.

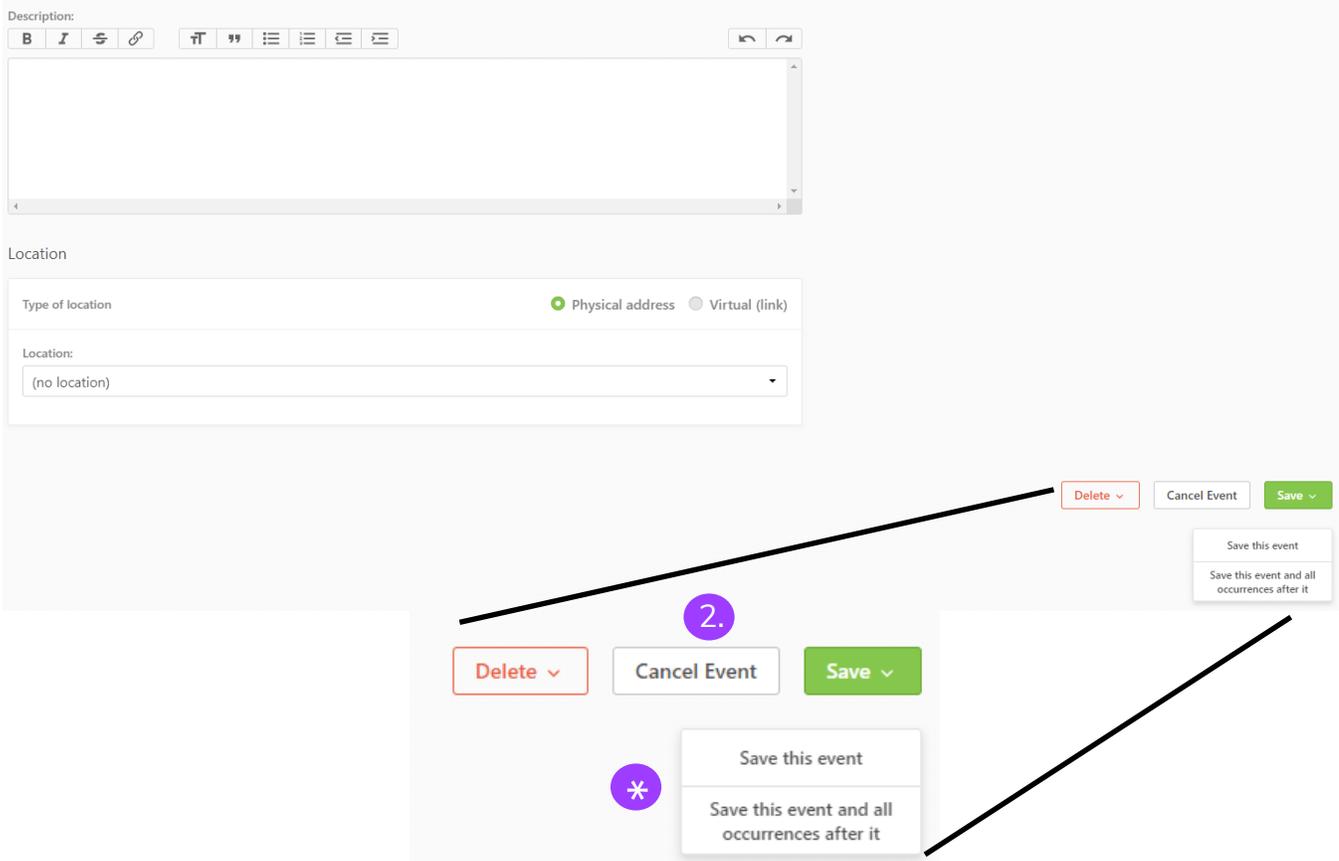
To cancel an existing event:

2. Like in step 1 above, click on the event and select “Edit event.” If desired, add an event description so your group knows why you canceled the event. Then click “Cancel Event” at the bottom right of the page.

It will then give you the option to notify your group members.

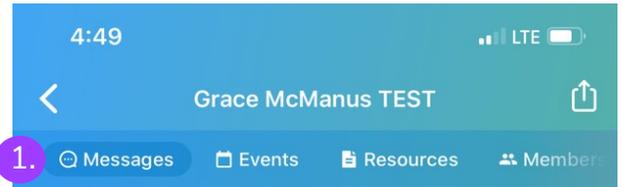
***Note:** If you accidentally cancel an event, edit that same event again, then click “Un-Cancel” at the bottom right.

If your group ever decides to NOT meet, please cancel the event on your own.



FROM THE APP

You can view group members & minor settings, but you can't adjust this data within the app. You CAN edit events.



Open the app, log in, and select your group.

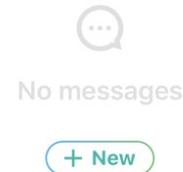
1. At the top of the app, under your group's name, there will be multiple tabs.

-Click the **Members** tab to see all members and leaders of the group.

***Note:** Click on their name to email, call, or text them directly from your phone.

-Click the **About** tab to see settings.

-Click the **Events** tab to see the group's events. Click a specific event, then the three dots at the top right, to edit or cancel it.



HOW TO: SEND AN EMAIL

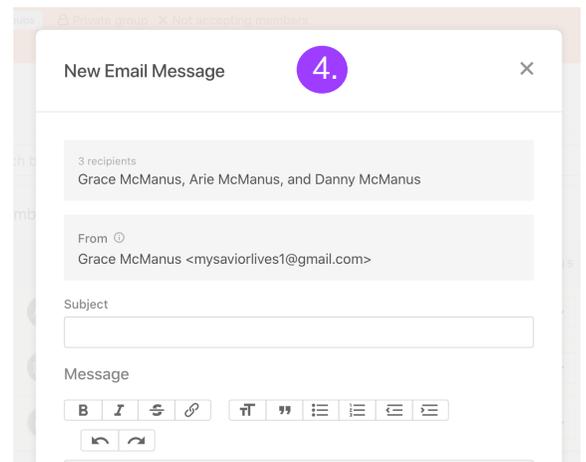
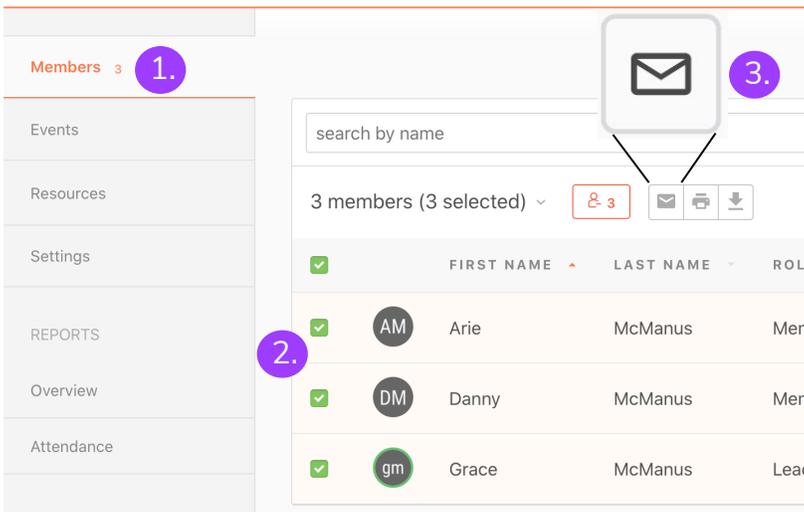
You can only send an email from a computer, not from within the app.

FROM A COMPUTER

1. Click the **Members** tab.
2. Click the box next to the names of those you want to email.
3. Click the email icon.

***Note:** Selecting the email icon first (instead of selecting the names) will allow you to simply email the entire group without having to click each name.

4. A box will pop up. Add the subject line and message. When ready, click "Send."



HOW TO: POST RESOURCES

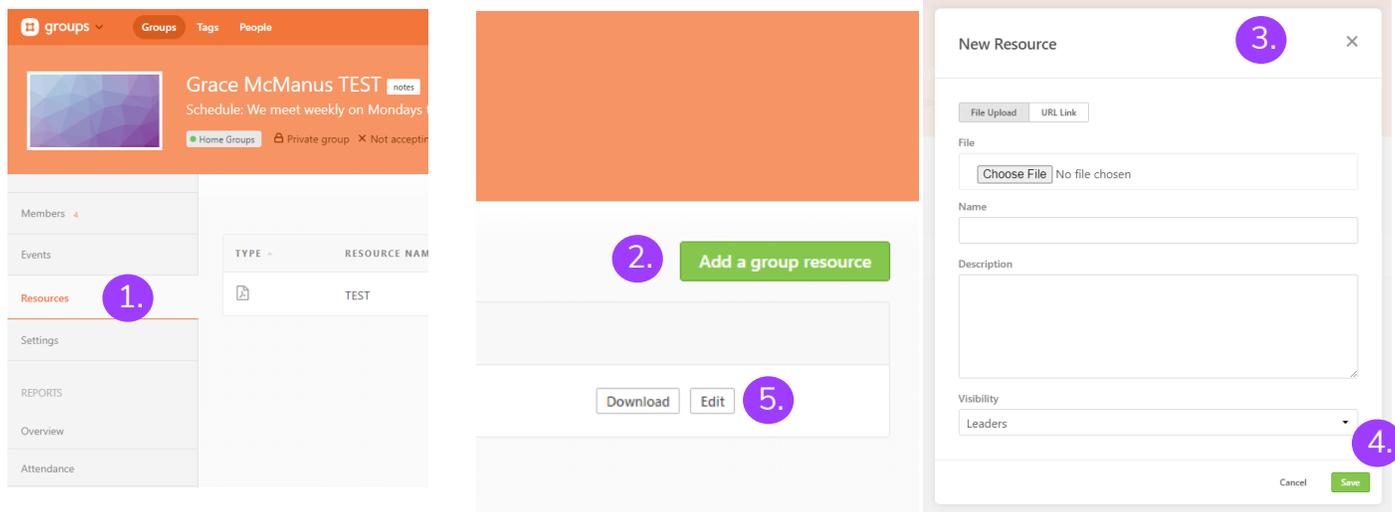
***Note:** For groups that follow the sermon as their discussion guide, we will post the discussion guide here as a resource the weekend before that Sunday's sermon.

FROM A COMPUTER

1. Click the **Resources** tab.
2. Click "Add a group resource."
3. Select the "File Upload" or "URL Link," depending on what you're uploading. Add a name and description, and select the visibility (meaning all members or only leaders can see it). Then choose your file.

***Note:** If you select "Members" for visibility, all members AND leaders will see it.

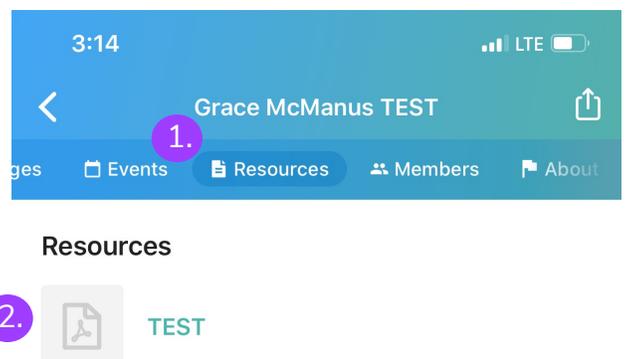
4. Select "Save."
5. If you need to edit or delete the resource, click the "Edit" box from the Resources tab. Once it opens, make your edits and click "Save" or you can select "Delete."



FROM THE APP

You can only view (not add or edit) resources from within the app.

1. Click the **Resources** tab
2. Select the resource to open it up.

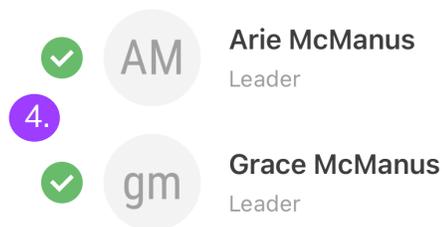
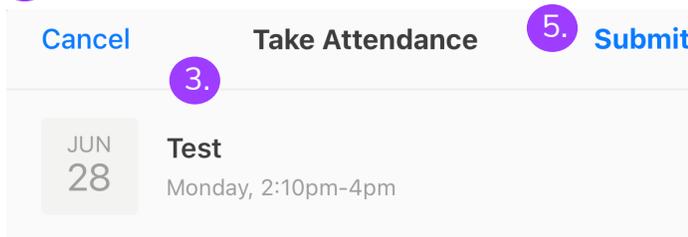


HOW TO: TAKE ATTENDANCE

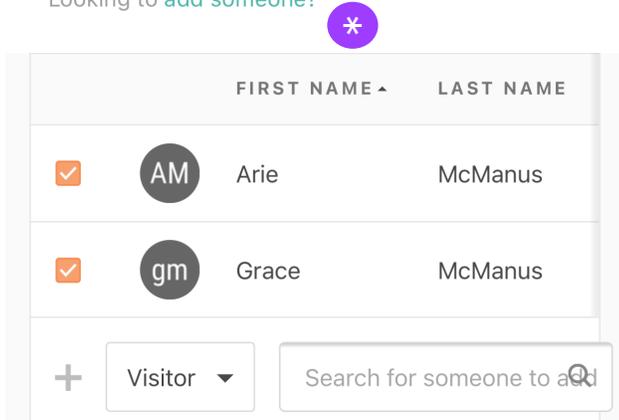
You will receive an email to take attendance 10 minutes prior to your event and can record attendance directly from the email. You can also record attendance from a computer or the Church Center app.

FROM THE EMAIL

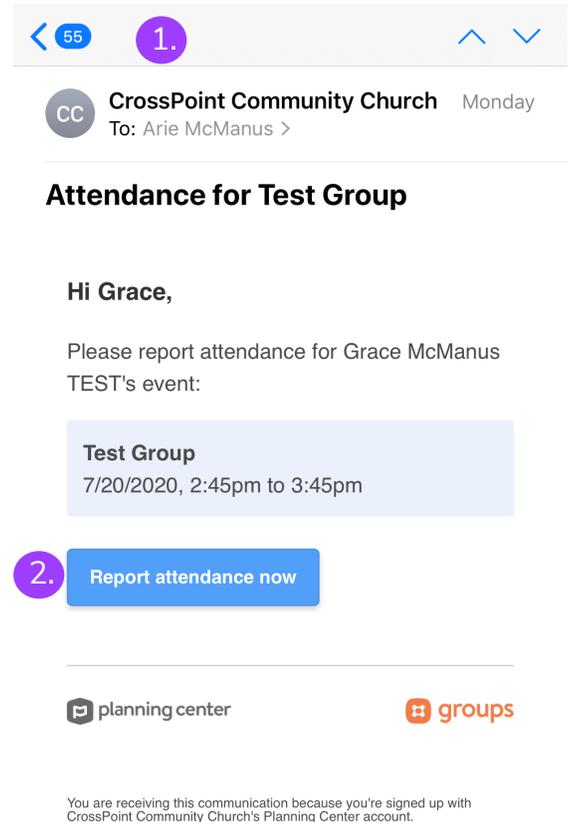
1. 10 minutes before your event begins, you will receive an email from CrossPoint requesting you to take attendance.
2. Click “Report attendance now.”
3. PCO Groups will open up in your web browser (or the Church Center app if you have it). It will bring up a roster of your group.
4. Check the box next to the name of each person in attendance.
5. Click “Submit.”



Looking to [add someone?](#)



- * If someone new comes to your group, click “Looking to add someone?” Then search for their name in the “Search for someone to add...” box on the next page. If they are in our system, select their name to add them to the roster (which also adds them to the group). Please always change “Visitor” to “Member.” If they are not in the system after searching their name, click “Create a new person” when the option appears. **Please see page 4 for an important note about adding people.**



FROM A COMPUTER

Click the **Events** tab, then find the event/meeting you need to take attendance for.

Click that event's name to open it up.

10 minutes before your group begins, attendance will be available.

1. Go to the "Attendance" section and click "Record Attendance."
2. Check the box next to the name of each person in attendance.
3. Click "Submit Attendance Report."

The screenshot shows the 'Attendance' section for an event named 'Test'. At the top, there is a breadcrumb 'Events > Test Group' and an 'Edit event' button. Below this, a calendar shows 'JUL 23' for 'Thursday' from '10:00am - 12:00pm'. A location box shows 'McManus Home, Modesto, CA' with a 'Show Map' button. The main event title is 'Test' with a date 'Jun 28 - 2:10pm' and a 'Submit' button. A table lists attendees with checkboxes, initials, and names: Arie McManus and Grace McManus. A search box at the bottom is labeled 'Search for someone to add'. On the right, an 'ATTENDANCE' section shows a message 'Attendance has not yet been submitted for this event.' and a 'Record Attendance' button. Numbered callouts (1, 2, 3, *) point to the 'Record Attendance' button, the checkboxes, the 'Submit' button, and the search box respectively.

- * If someone new comes to your group, search for them in the "Search for someone to add..." box. If they are in our system, select their name to add them to the roster (which also adds them to the group). Please always change "Visitor" to "Member." If they are not in the system after searching their name, click "Create a new person" when the option appears. **Please see page 4 for an important note about adding people.**

***Notes:**

- If you submit attendance but later need to go back and adjust it, you can.
- Go back to the "Attendance" section of the event you are working on (or simply click the same link from your email). There will be a "Modify" button next to the attendance section to click.
- Make your adjustments and click the "Submit Attendance Report" button again.
- If your coleader has already recorded attendance and you also attempt to, it will tell you that your coleader has recorded it, but will give you the option to amend the report if you'd like to.