



Planning Center Groups

Instructions for

Life Group Leaders

<https://jamesriver.church/lifegroups/planningcentergroups>



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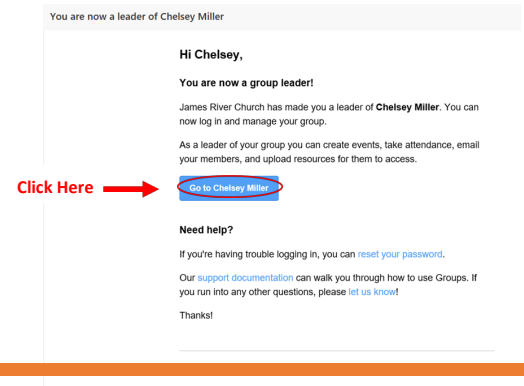
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Logging in to Your Planning Center Group

You will receive an email from James River Church titled “You are now a Leader of (Group Name)”

Step 1:

Open email and click the blue button to go to the group.

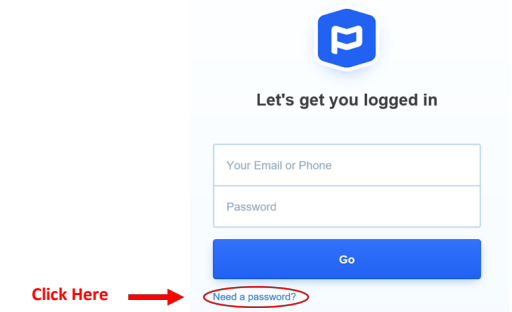


Step 2:

You will be brought to the Planning Center Login page.

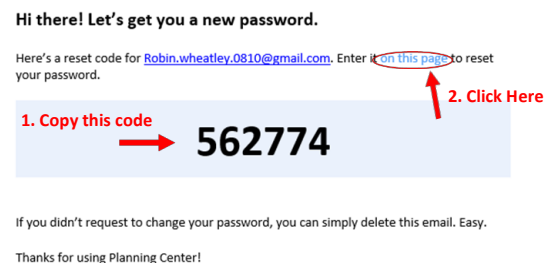
If you already have a Planning Center Login go ahead and login and it'll take you to the group.

To create a new login, click “Need a password?” and enter your **EMAIL**.



Step 3:

You will receive a “password reset” email from Planning Center. Open email (see below), copy code and click “on this page”.



Step 4:

You will be brought back to the Planning Center Login where you enter your code (copied in Step 3) “press continue” and then create your password.

Your Group is ready!

Once you create a password, you will be logged into your group.

You can also access your group by opening the email “You’ve Been Added to a Group” and click “View Group”.

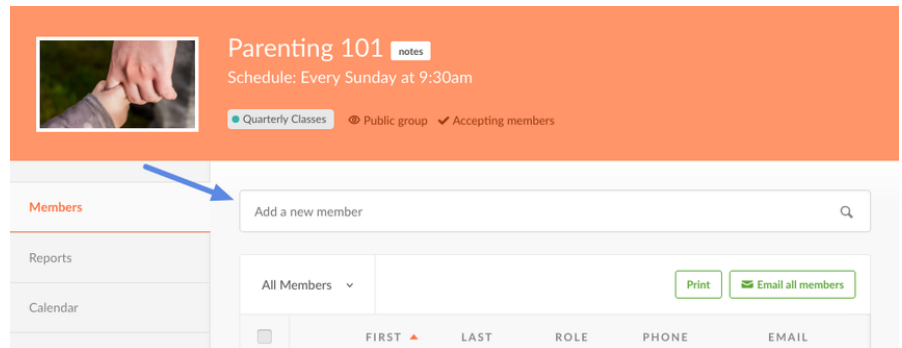
Make sure to “save/bookmark” your Planning Center login link for easy access: <https://accounts.planningcenteronline.com/login/new>

Adding Members & Accepting Membership Requests

Adding Members:

Type a person's name into the *Add a new member* field and select their name when it appears. If they don't yet exist in the database, select *Create a new member* to add them to your database.

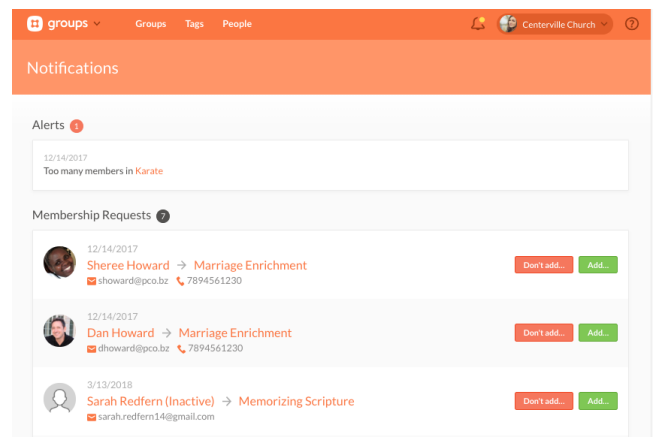
After the person accepts the request to join the group, they will be added to the group as a member.



Accepting or Rejecting Membership Requests Step 1:

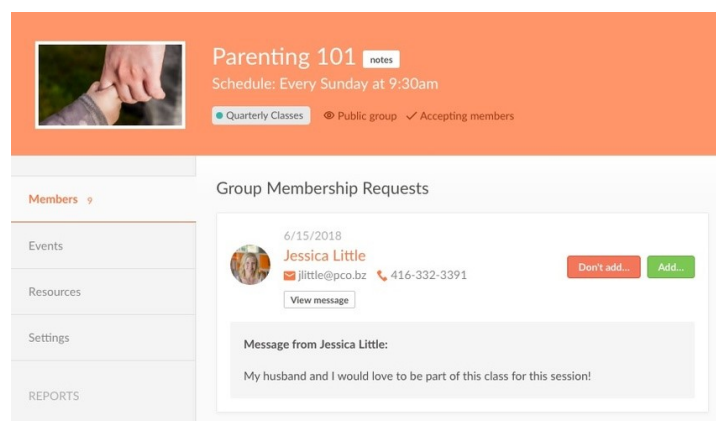
Membership requests will be visible on the administrative side of each Groups page and on the notifications page.

💡 To see the message from the person who wants to join, select *View Message*, and the message will expand below the request.



Step 2:

To approve or deny a member request to join, click either the *Don't add* or *Add* button next to the person's name.



Step 3:

Whether you add or remove a person, you can choose to send them an email.

- 1 Make sure that the correct action is showing in the dropdown.
- 2 Enter a subject, so the person will know why you're emailing.
- 3 Welcome the person to the group or explain why they cannot join at this time. Use this email to give them any initial necessary information.

Select **Send Message** to send the email to the person.

This is a great way to send the first email to your new member as required on the Life Group Leader Qualifications & Commitment form!

The screenshot shows the 'Membership Request Response' form. At the top, there's an orange header. Below it, the 'Action' dropdown is set to 'Add to Group as a Member' (marked with a blue '1'). To the right, the 'Reply' section has a checked checkbox for 'Send an email to Jessica'. The 'To' field contains 'Jessica Little'. The 'From' field contains 'William Gutierrez <pastorwill@pco.bz>'. The 'Subject' field contains 'Welcome to the Group!' (marked with a blue '2'). The 'Body' field contains a message starting with 'Hey Jessica!' (marked with a blue '3') and details about a meeting at Chick-fil-a. At the bottom, there are 'Cancel' and 'Send Message & Add to Group as a Member' buttons.

If, for any reason, you don't want the person to receive an email, uncheck the **Reply** box, and then click the button to add the person or reject the request.

The screenshot shows the 'Membership Request Response' form with the 'Action' dropdown set to 'Don't Add to Group'. The 'Reply' section has an unchecked checkbox for 'Send an email to Jessica'. A blue arrow points from the 'Reply' section to the 'Don't Add to Group' button. At the bottom, there are 'Cancel' and 'Don't Add to Group' buttons.

Taking Member and Visitor Attendance

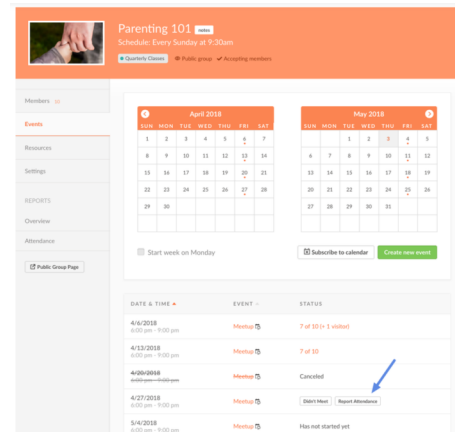
A group's Events tab shows the attendance status for each event. Events are listed in chronological order and show the date, name attendance, if it's already been taken!

Step 1: Open Attendance Roster

Option 1:

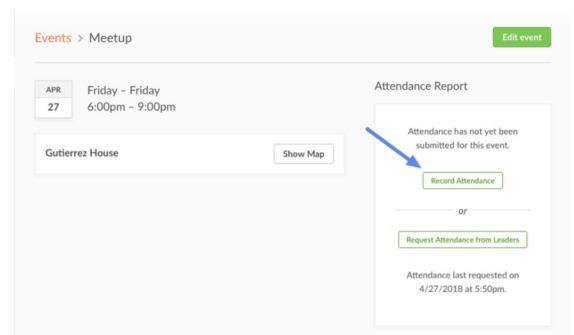
Select **"Report Attendance"** to be taken directly to the attendance roster.

i Group leaders receive an attendance email approximately 10 minutes before the start of an event. You can also click the link in this email to get to the Attendance Report.



Option 2:

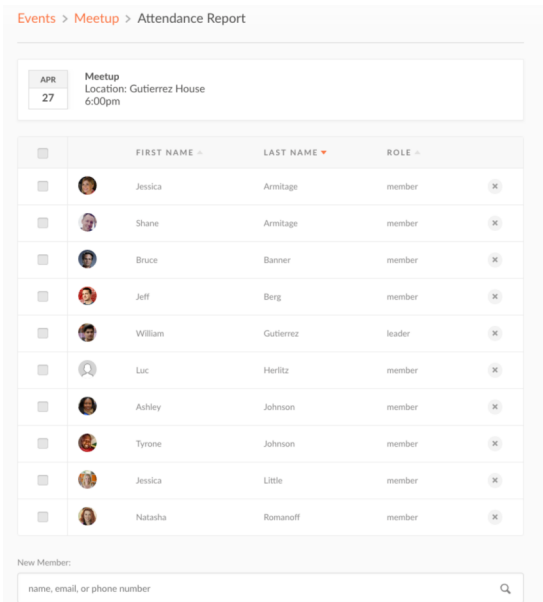
Select the event and Click **"Record Attendance"** in the event page to access the attendance roster.



Step 2: Take "MEMBER" attendance

In the Attendance Report, put a check next to members who were present, and search for others who attended and want to be added as a member.

! If you are a leader and you are not seeing the New Member or New Visitor search bar to add a new member or visitor, reach out to your administrator. This is a feature that can be turned on/off by your admin.



Step 3: Record any “VISITORS” that attended the event

i Previous visitors to the group show at the bottom of the roster. A visitor will be listed in the Visitor list until you use the buttons to promote or remove them, which can only be done on the attendance roster for the most recent event.

- 1 Check the box next to any visitors that attended the event.
- 2 Promote the visitor to a member.
- 3 Remove the visitor from the attendance report.
- 4 Search for a new visitor.

	FIRST NAME	LAST NAME	ROLE	
1	Kimmie	Gibbler	visitor	2 3
	Jamie	Siebens	visitor	

New Visitor: 4

name, email, or phone number

8 7 Members 1 Visitor

Submit Attendance Report

Select *Submit Attendance Report* to record the attendance to the event.

Once attendance is added to the event, check out the reports to track any changes.

Step 4: How to modify your attendance report

- To modify attendance for an event, go to the event page, and click “*modify report*”.
- Make any needed adjustments in the Attendance Report, click “*Submit Attendance Report*” to submit the change.

Members 11

Events > Johnson Meetup

SEP 6 Thursday 8:00am - 10:00am

Justin's Apartment Show Map

Event Reminders

Event has already happened

ATTENDANCE REPORT

Submitted By Aaron Stewart

Modify Report

7 Members

- Adam Endeeve
- Ashley Johnson
- Tyrone Johnson
- Jessica Little
- Judy Mieyr
- Hamilton Porter
- Jason Terhorst

Never delete a member from your group.

Your Life Group office will handle removing people as needed.

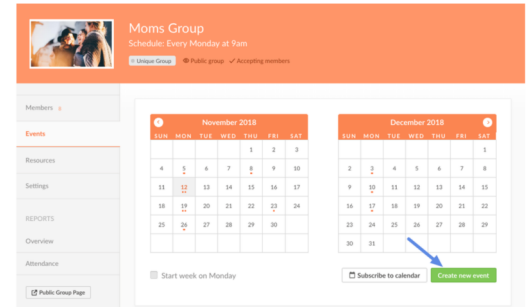
Create, Edit, or Delete an Event

People in groups like to get together, which requires knowing when and where to go! The calendar helps you keep all of that organized, so your members will be able to attend all the events you create.

Step 1: Create an Event

From a Groups events tab, click *"Create new event"*

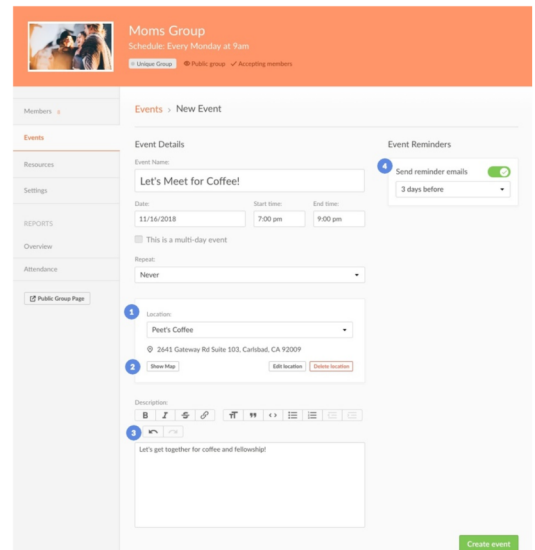
- i** If you are an Admin, you can also create the event from the Groups main page. If you do this, you will need to fill in details about the event before you go to the New Event page.



Step 2: Enter Event details

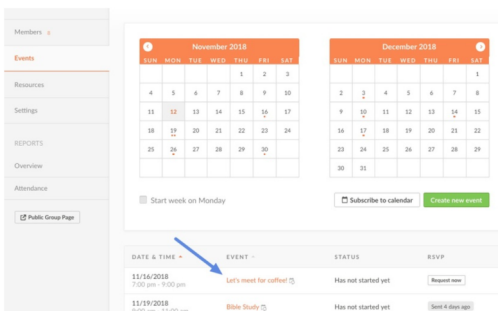
- 1 Choose a location from the dropdown and use *Edit location* to add a specific address, or, if you don't know the address, drop a pin at your location.
- 2 View a preview of the map that members or non-members will see on the groups page (depending on the Group Settings).
- 3 Enter the description for the event shown on the groups page.
- 4 Set *automated reminders* for the event.

Select *Create event* when you're finished, and your event will be added to the calendar!

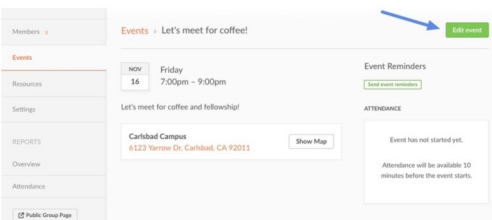


Step 3: Edit the Event

Select the event name from the list to make changes.

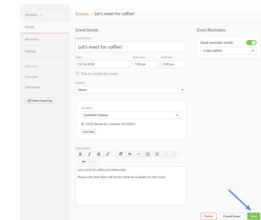


View more details like a map of the location or select *Edit* event to make changes.



i From this event page, you can send event reminder emails.

Edit any information then scroll to the bottom and *Save*.



i If your event repeats, choose to save only this event or all future events as well.

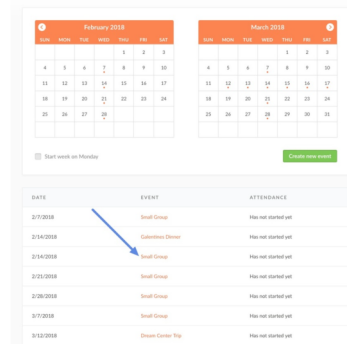
Step 4: Cancel or Delete the Event

If you have an event that is no longer taking place, there are two ways to update your calendar.

Delete an Event: This is permanent and removes all traces of the event from the calendar. If attendance was taken and Visitors were listed, that information will be permanently erased as well.

Cancel an Event: Unless your event was created by mistake, this is usually the best option for events that aren't taking place. When you use this option, the event remains on the calendar (both online and in subscriptions) but is labeled as "Canceled" so that members are aware.

Here's how these options work. On the group calendar, select the event.



Cancel the Event

1) Scroll to the bottom of the event and choose "Cancel Event"

Description

Come hang with some college students who are in #thestruggle. Midterms, crazy profs, and trying to afford rent are just some of the light topics we discuss.

2) You will be given the option to notify group members the event has been canceled. Check the box and type in the reason to send to group members.

Cancel Event

☒ Notify group members?

It's Valentine's Day, so no small group! Celebrate with someone you love--even if it's us. :)

3) Choose "Cancel Event" to finalize the change.

The event will remain on the group calendar; however, it will not have a line through it, and the attendance column shows *Canceled*.

If you change your mind, you can go back to the event and un-cancel!

DATE	EVENT	ATTENDANCE
2/7/2018	Small Group	Has not started yet
2/14/2018	Small-Group	Canceled
2/14/2018	Galentines Dinner	Has not started yet
2/21/2018	Small Group	Has not started yet

Delete the Event

1) Scroll to the bottom of the event and select “Delete”

If your event repeats, choose to delete only this event or all future events as well.

! Deleting an event is a permanent action.

Description

B

I

Come hang with some college students who are in #thestruggle. Midterms, crazy profs, and trying to afford rent are just some of the light topics we discuss.

Delete

Cancel Event

Save

Delete this event

Delete this event and all occurrences after it

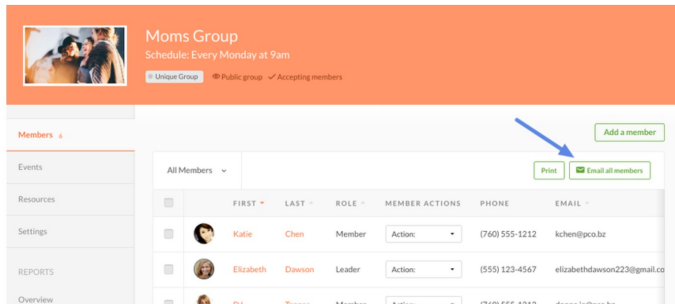
Des

Contacting Group Members

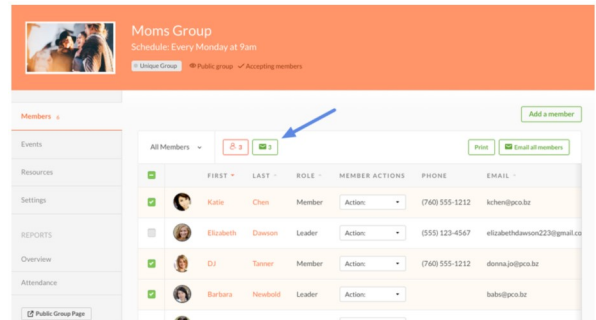
Contact Life Group members by sending an email!

Step 1: Select Group Members

To email ALL members of the group go to the Members tab on your group, and then click “Email all members”.



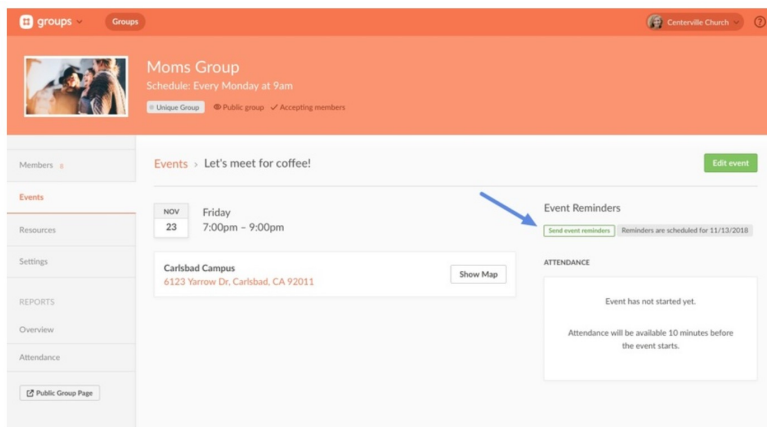
To email SELECTED group of members, put a check by the names of the people you want to email, and then click the email icon with the number of members that you selected.



Step 2: Compose Email

Complete the subject and message in the email form, and then click “Send”.

💡 If you want to simply remind your members of an event coming up, send them a **reminder email** from the event page!

A screenshot of the 'New Message' email composition form. It shows 6 recipients: Ashley Johnson, Katie Chen, Barbara Newbold, Elizabeth Dawson, Aubrey Wentz, and DJ Tanner. The 'From' field is filled with 'Elizabeth Dawson <elizabethdawson223@gmail.com>'. There are fields for 'Subject' and a large text area for the message body. At the bottom, there are 'Clear Message', 'cancel', and 'Send' buttons.

Adding a Resource

Resources are files that are available for group members to access. The types of files that you can add include PDFs, Microsoft Word docs, text files, small image and video files, and URLs.

Step 1: Go to the Resources tab and select *Add a group resource*

- 1 Choose the *File Upload* or *URL Link* tab.
- 2 Browse your computer for a file or enter a URL that you want to link to.
- 3 This field will be displayed on Resources pages. The actual file name or URL will not be visible.
- 4 Enter what the resource is for or when to use it.
- 5 Allow only Leaders or all Members to access the Resource.

Select *Save* to upload the file or add the link to your Resources page.

All resources will be listed with labels showing who can access them.

The screenshot shows a 'New Resource' form with an orange header. Below the header are two tabs: 'File Upload' and 'URL Link'. The 'URL Link' tab is selected. The form contains the following fields:

- Link:** A text input field containing the URL <https://www.desiringgod.org/articles/five-tips-for-bible-memory>.
- Name:** A text input field containing 'Bible Memory Tips'.
- Description:** A text input field containing 'Here are some great tips for memorizing scripture!'.
- Visibility:** A dropdown menu with 'Members' selected.

At the bottom right of the form are 'Cancel' and 'Save' buttons. Numbered callouts 1 through 5 are placed over the tabs, Link field, Name field, Description field, and Visibility dropdown respectively.

i Resources are listed in alphabetical order based on their name.

i Any Shared resources will already be listed in the Resources tab with the *Shared* label attached.