planning center
Groups

PLANNING CENTER INSTRUCTIONS
FOR HOPE FAMILY LEADERS

https://myhopelive.churchcenter.com/groups/hope-family

HOPE
CHURCH
pursue. embrace. transform.

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Logging in to Your Planning Center Group

You will receive an email from Hope Church titled "You are now a Leader of (Group Name)"

Step 1:

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

Hi Ciera!

Ciera Agee has invited you to help manage Hope Church's group, Test Group!

As a leader, you will be able to manage your group settings, create events, and take attendance for your group.

Logging In

In order to access Groups, you need an email address and password:

- Your email address is: cagee@hopechurch.net
- Log in using your usual Planning Center password.

Your password should never be shared, and you can bookmark Groups to easily access it in the future.

Helpful Links

You can check out our Group Leader Introduction to take your first steps. In addition, here are some helpful links to get you started managing Groups:

- What Can I Access in Groups?
- Take Attendance at a Group Event
- Send Reminder Emails
- Help Members Use Groups

Click Here → ⬭ Go to Test 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 **E M A I L**.

Let's get you logged in

Your Email or Phone

Password

Go

Click Here → Need a password?

Step 3:

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

Hi there! Let's get you a new password.

Here's a reset code for Robin.wheatley.0810@gmail.com. Enter it on this page to reset your password.

2. Click Here

1. Copy this code → **562774**

If you didn't request to change your password, you can simply delete this email. Easy.

Thanks for using Planning Center!

Step 4:

You will 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 you group.

You can also access your group by opening the email *"You've Been Added tot 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.
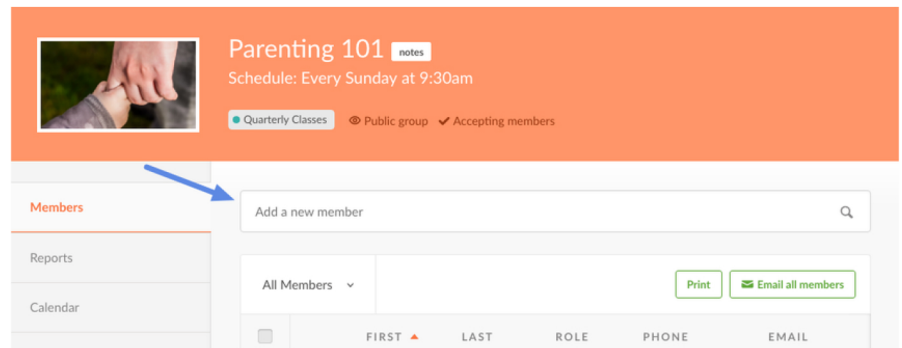
## Accepting or Rejecting Membership Requests Step 1:

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.
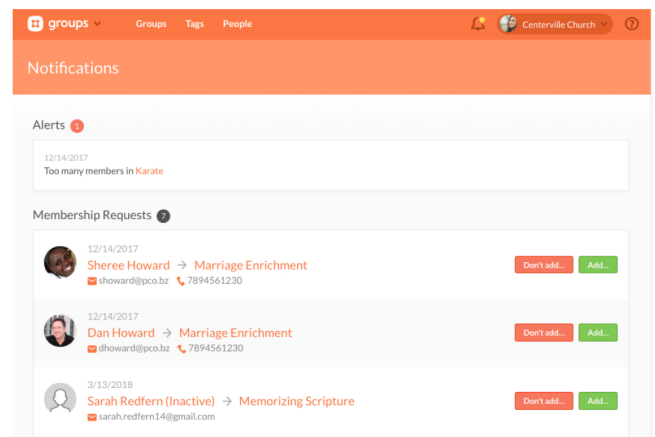
Step 2:

To approve or deny a member request to join, click either the *Don't add* or *Add* button next to the person's name.
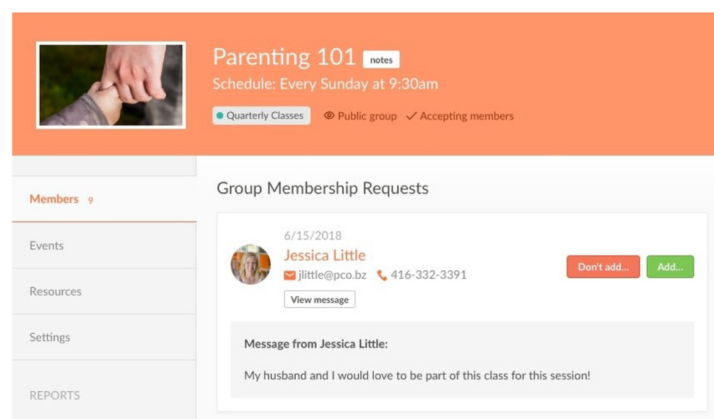
1 Make sure that the correct action is showing in the dropdown.

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!

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.


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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
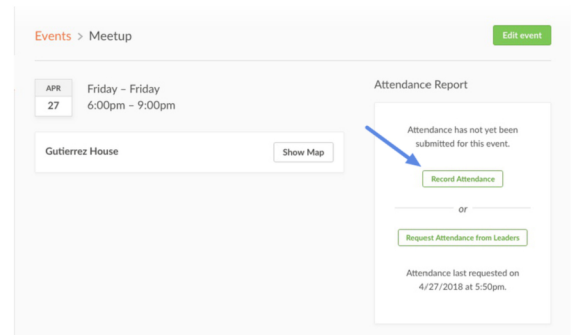
Option 1:

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

> ℹ️ 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.
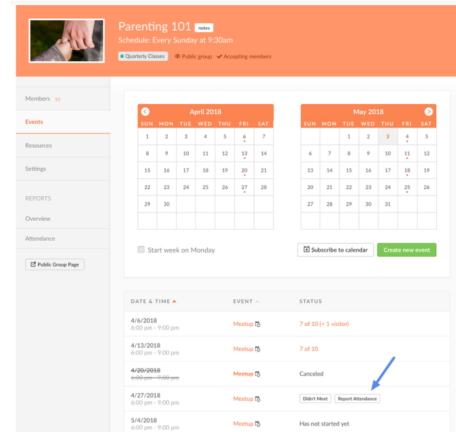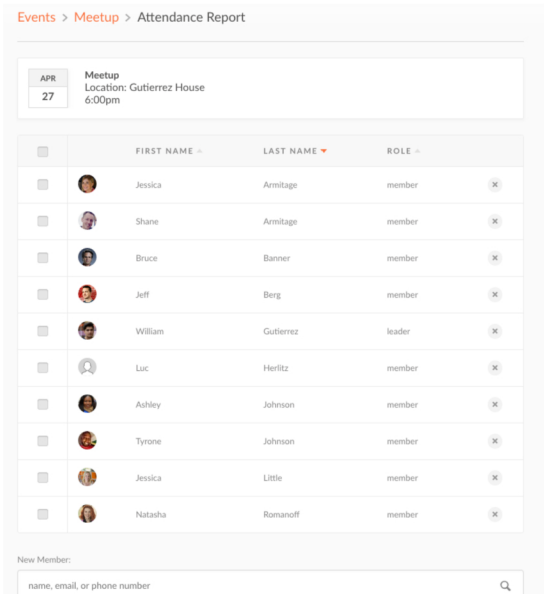
Option 2:

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.

Events > Meetup > Attendance Report

	FIRST NAME	LAST NAME	ROLE	
	Jessica	Armitage	member	×
	Shane	Armitage	member	×
	Bruce	Banner	member	×
	Jeff	Berg	member	×
	William	Gutierrez	leader	×
	Luc	Herlitz	member	×
	Ashley	Johnson	member	×
	Tyrone	Johnson	member	×
	Jessica	Little	member	×
	Natasha	Romanoff	member	×

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Step 3: Record any "VISITORS" that attended the event

ℹ️ 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.

			FIRST NAME ^	LAST NAME ▾	ROLE ^		
➊	☑	🖼️	Kimmie	Gibbler	visitor	♟️ ✕	
	☐	◯	Jamie	Siebens	visitor	② ♟️ ✕ ③	

New Visitor: ④

name, email, or phone number   🔍

8	7 Members
	1 Visitor

Submit Attendance Report

➊ Check the box next to any visitors that attended the event.

➋ Promote the visitor to a member.

➌ Remove the visitor from the attendance report.

④ Search for a new visitor.

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		Edit event
Events			
Resources	SEP 6	Thursday 8:00am – 10:00am	Event Reminders Event has already happened
Settings			ATTENDANCE REPORT
	Justin's Apartment	Show Map	Submitted By Aaron Stewart Modify Report
REPORTS			7 Members
Overview			Adam Endeeve
Attendance			Ashley Johnson
⧉ Public Group Page			Tyrone Johnson
			Jessica Little
			Judy Mieyr
			Hamilton Porter
			Jason Terhorst

**Never delete a member from your group.
The church 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 were 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"*

ℹ️ 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.
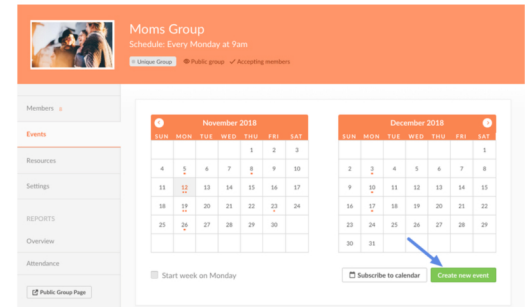
Step 2: Enter Event details

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.

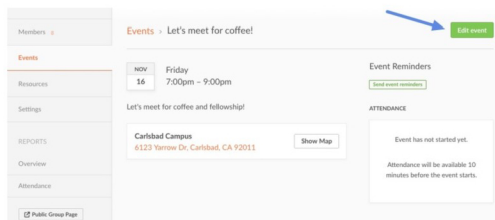④ Set automated reminders for the event.
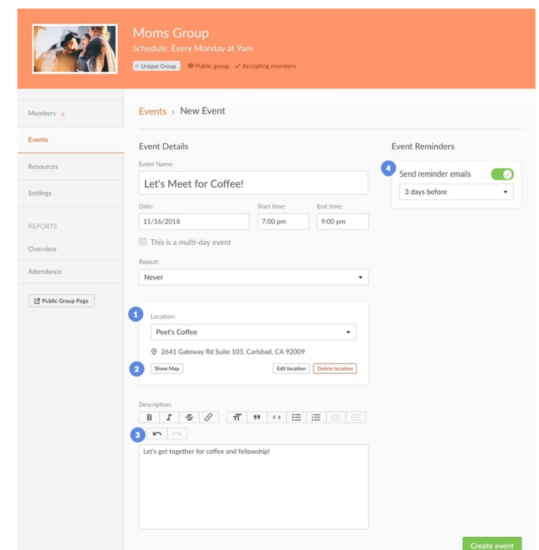
Select *Create event* when you're finished, and your event will be added to the calendar!

Step 3:   Edit the Event
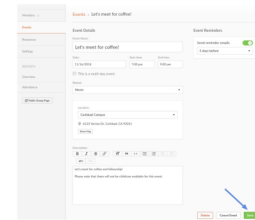
Select the event name from the list to make changes.
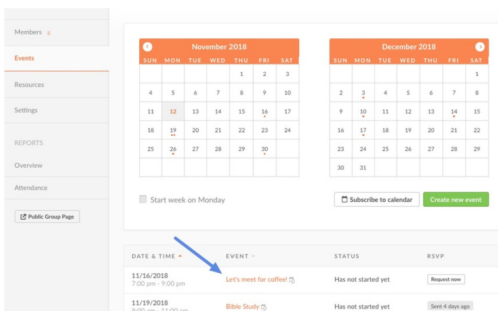
View more details like a map of the location or select *Edit event* to make changes.

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

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

ℹ️ 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 form the calendar. If attendance was taken and Visitors were listed, that information will be permanently erased as well.

Cancel an Event: Unless your event as created by mistake, this is usally 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 sis labeled as "Canceled" so that members are aware.

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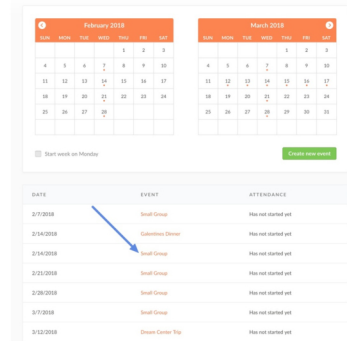
Cancel the Event

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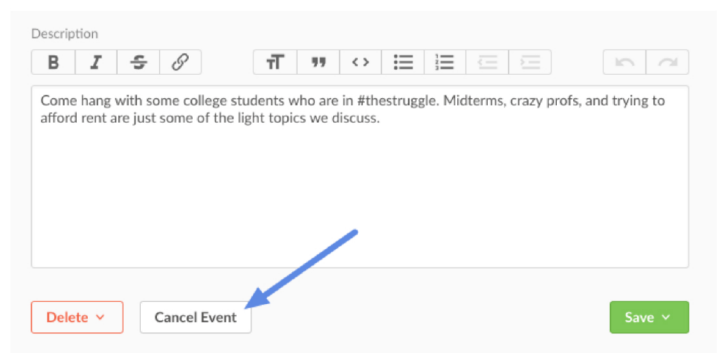

2) You will be given the option to notify group members the event has been canceled.
Check the box and type in the reason to send to group members.
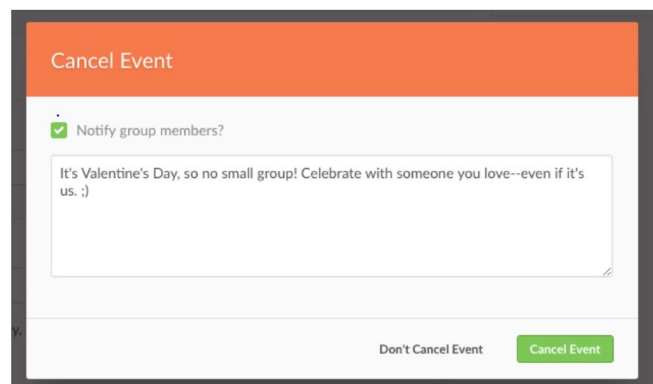
3) Choose *"Cancel Event"* to finalize the change.

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!

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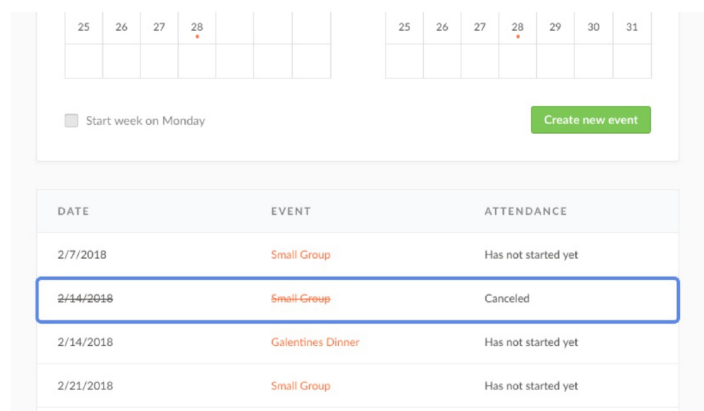
Delete the Event

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.

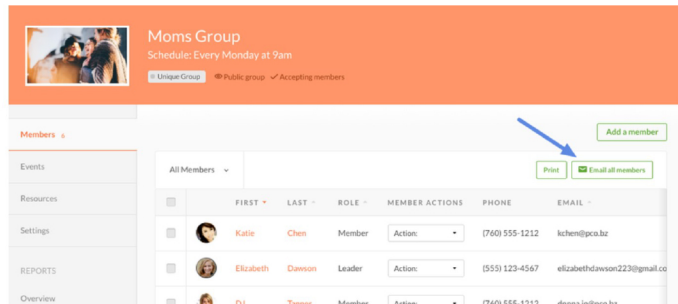❗ Deleting an event is a permanent action.
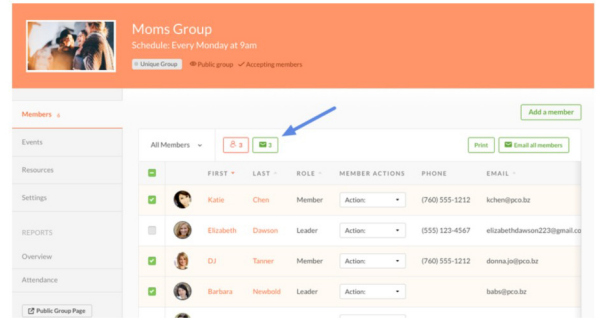
Contacting Group Members

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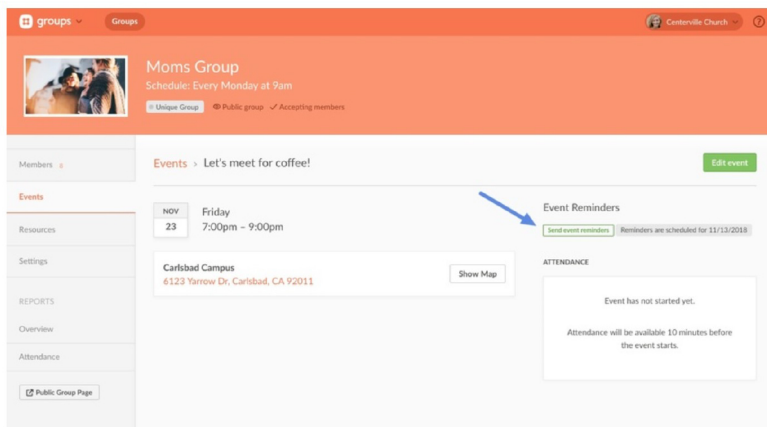
To email SELECTED group of members, put a check by the names of the people you want to email, and then click the email icon with the number of members that you selected.

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!

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.

New Resource

1. File Upload | **URL Link**

2. Link
https://www.desiringgod.org/articles/five-tips-for-bible-memory

3. Name
Bible Memory Tips

4. Description
Here are some great tips for memorizing scripture!

5. Visibility
Members ▼

Cancel   **Save**

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

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