

# Planning Center (PCO) Integration Tool

## User Guide

**Planning Center (PCO)** is a web-based planning system for worship services. Many churches use Planning Center to schedule and manage volunteers.

**Ministry Platform (MP)** is a church management system used for collecting and using data about congregants. Ministry Platform churches typically use MP as the primary system for entering and reporting on congregants' participation information.

The **Planning Center Integration Tool** is utility that will allow for linking People in Planning Center to Contacts in Ministry Platform. Additionally, Service Types in Planning Center can be linked to existing Programs in Ministry Platform.

Once People are linked with Contacts and Service Types are linked to Programs, all historical Planning Center Plan data can be quickly imported into Ministry Platform. Serving history in Planning Center can be recorded in Ministry Platform using this tool.

### Highlights of the PCO Tool:

- PCO Integration Tool is a Windows application**

- PCO and MP are connected via their respective APIs**

- Link PCO People to MP Contacts**

- Import PCO Plans into MP Events**

- Link PCO Service Types with MP Programs**

- Import PCO Positions into Group Participant Roles**

- Import PCO Positions into Event Participant Notes**

# Initial Setup: Settings Screen

The first time you launch the PCO Tool, configure the settings screen to specify how the data is imported into MP.

Click **File > Settings** to access the connection settings dialog box.

Planning Center Integration Tool - Connection Settings

PCO Application ID	.....
PCO Secret	..... <a href="https://api.planningcenteronline.com/oauth/applications">https://api.planningcenteronline.com/oauth/applications</a>
MP Contact ID	683720
MP Group ID	11839
MP Event Type ID	23
<input type="checkbox"/> Use Existing MP Events for Plans	
Event Title Prefix	PCO-
<input type="checkbox"/> Use MP Group Roles for Positions	
MP Group Role Type ID	14
Group Role Prefix	
People Last Run	4/10/2017
Service Types Last Run	11/4/2016
Plans Last Run	4/4/2017

Save Cancel

**PCO Application ID / PCO Secret:** Login to your PCO account to obtain these keys

**MP Contact ID:** The Contact ID associated with the PCO Integration Tool User Account (for Audit Logging)

**MP Group ID:** The Group into which PCO People will be added

**MP Event Type ID:** The Event Type for imported events

**Use Existing:** Will match to existing events in MP. If unchecked, new events will be created.

**Prefix:** New event records will use this prefix in the event title

**Use MP Group Roles:** Group roles will be created for PCO Positions. If unchecked, group role ID 1 will be used

**Group Role Type ID:** Role Type for created Group Roles

**Group Role Prefix:** Optional prefix to distinguish PCO roles

**Group Role Type ID:** Role Type for created Group Roles

**Last Run Dates:** Updated automatically each time the tool is loaded

# People to Contacts

The PCO Integration Tool allows you to match Planning Center People with Ministry Platform Contacts. You can choose which information to keep prior to linking or importing individuals.

Contact information does not continuously sync between Planning Center and Ministry Platform after the initial link is created. Once linked, only participation and serving data is updated in Ministry Platform.

## Key:

**Green**—Person has been linked to a Contact record

**Red**—Person has not been linked to a Contact record

**Gray**—Person has been ignored

## Options:

Filter the People in the list using the **Filter By** search box or the checkbox toggles to Show Unlinked, Show Linked, and/or Show Ignored.

Click **Unlink Contact** to remove a linked contact.

Click the **mp** button to go to the Contact record in Ministry Platform.

# People to Contacts

## Instructions:

1. Highlight a Person in the panel on the left.
2. Review the suggested match in the panel on the right.
  - a. If there is not a match with an MP Contact record:

You may click on the [magnifying glass icon](#) next to the PCO ID field to search for the person in MP (e.g. if you suspect a first name/nickname mismatch).

You may use the Add/Edit Family tool in Ministry Platform to add the individual to MP.

You may click [Ignore Person](#) to hide him/her from the list of unlinked PCO People.

- b. If there is a match with an MP Contact record:

Use the checkboxes to choose which information to keep.

3. To link the PCO Person to the MP Contact, click the [Link and Save Contact](#) button.

The PCO Tool will update contact information in Ministry Platform for selected fields if desired but will not update information in Planning Center.

Planning Center Integration Tool - Organization: Perimeter Church

File Tools Help

People to Contacts Service Types to Programs Plans to Events

**People**

Filter By  Clear

Show Unlinked  Show Linked  Show Ignored

Person	Updated	Created
Andrew	2017-04-12	2017-04-12
Christine	2017-03-23	2017-03-23
Cameror	2017-03-07	2017-03-07
Mike	2016-12-15	2016-12-15

1

**Planning Center Person**

PCO ID: 24886852

Last Updated: 03/23/2017

Created: 03/23/2017

First Name: Christine

Last Name:

Email Address:

Mobile Phone:

Home Phone:

Address:

City:

State:

Postal Code:

Birth Date:

Anniversary Date:

Created By: Mary

**Ministry Platform Contact**

PCO ID:   mp

Last Updated: 01/11/2017

First Name (Nickname): Christine

Last Name:

Email Address:

Mobile Phone:

Home Phone:

Address:

City:

State: GA

Postal Code:

Birth Date (Age): 09/01/

Anniversary Date: 11/07/

Gender: Female

Contact ID: 676208

Household ID: 584795

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3 [Link and Save Contact](#) [Unlink Contact](#) [Ignore Person](#)

Not Linked: 4, 30%

Linked: 1135, 84.96%

Ignored: 197, 14.75%

Details loaded for Christine (24886852).

# Service Types to Programs

The PCO Integration Tool allows you to choose which Planning Center Service Types you would like to import into Ministry Platform.

Participation data is not imported when you link Service Types to Programs. This data will be imported during the next step—using the Plans to Events page.

Service Types that are not linked to a program will not be available to import on the Plans to Events page.

For Service types you wish to make available for import, select the Ministry Platform Program that corresponds to the PCO Service Type.

## Instructions:

1. Highlight a PCO Service Type in the list in the panel on the left.
2. Select a Ministry Platform **Congregation** and **Program** in the drop-down boxes in the panel on the right
3. Click the **Save Link** button
4. If you wish to remove a linked program, click the **Delete Link** button

Planning Center Integration Tool - Organization: Perimeter Church

File Tools Help

People to Contacts Service Types to Programs Plans to Events

**Service Types**

Filter By  Clear

PCO Service Type	MP Program
Hanger (26073)	**Perimeter Church:Worship & Arts Activities (2093)
Main Auditorium (27135)	**Perimeter Church:Worship & Arts Activities (2093)
Sunday Night Watershed (31133)	
Twenties (36577)	**Perimeter Church:Young Adults (2026)
RUSH CONFERENCE (38453)	**Perimeter Church:Rush (2038)
Watershed Worship Rehearsal (44621)	
Shepherding (45801)	
Chapel 10:45am (71355)	**Perimeter Church:Worship & Arts Activities (2093)
Wednesday Night Meeting (73420)	
<b>Bricks (78263)</b>	**Perimeter Church:Bricks (2143)
Jhi Sundays (149607)	**Perimeter Church:Jhi Nights (2127)
Camp All-American (221384)	
Campus Meetings (237708)	
Young Families (241068)	
Women's Ministry (245410)	
Community Night (CAA/College/20s) (269021)	
KidsQuest Sunday Morning (276454)	**Perimeter Church:KidsQuest Activities (2116)
Special Events (278452)	
Sixth Grade - Events (287958)	
3rd-4th Grade @ 9:00 AM (Uptown) (288040)	
3rd-5th Grade @ 10:45 AM (Uptown) (289482)	
LOL Clinics (332452)	
Parent U (443216)	
Saturday Night Kids (478324)	
Saturday Night Worship (487122)	**Perimeter Church:Worship & Arts Activities (2093)
IF 2015 (489083)	
Christmas Show 2015 (491147)	
Master Song Lists (493288)	
Master Classes (510530)	
KidsQuest Specials (513150)	
Good Friday (547924)	
Maunder Thursday (547926)	

**Planning Center Service Type**

Service Type

**Ministry Platform Program**

Congregation

Program

Details loaded for Bricks (78263).

# Plans to Events

The Plans to Events page allows you to match or import PCO Plans into MP Events.

It also allows you to import PCO People into MP Event Participants and Group Participants.

## Planning Center

## Ministry Platform

Plan



Event

Program: selected on the Service Types to Programs page

New event records created: if "Use Existing" is unchecked in Settings

Event Title prefix: is specified in Settings

Primary Contact: Contact ID specified in Settings

People in Plan



Event Participants

Notes: PCO Position

People in Plan



Group Participants

Group: Group ID is selected on Settings screen

Group Role: PCO Position or Group Role ID = 1 (selected in Settings)

**Service Types**

PCO Service Type	MP Program	# P...	# I...	# I...	# ^
- All Linked Services	- All Linked Programs -	957	542	406	
Hanger(26073)	Worship & Arts Activit...	65	64	0	
Main Auditorium(271...	Worship & Arts Activit...	462	68	393	
Sunday Night Waters...	Watershed Discipleship	29	20	9	
Twenties(36577)	Young Adults	34	33	0	
RUSH CONFERENC...	Rush	10	10	0	
Chapel 10:45am(713...	Worship & Arts Activit...	72	68	3	
Bricks(78263)	Bricks	31	31	0	

**Plans for Hanger**

Filter By:

Show New Plans  Show Imported Plans  Show Ignored Plans

Plan Name	Service Dates	Status
<input type="checkbox"/> WL: RC/KS - Impact Teens; WP: JS w...	April 9 2017	Import...
<input type="checkbox"/> WL: CB; WP: Ryan Brown	April 2 2017	Import...
<input type="checkbox"/> WL: CB/KS; WP: JS	March 26 2017	Import...
<input type="checkbox"/> WL: RC; WP: ML	March 19 2017	Import...
<input type="checkbox"/> Adult Baptism - WL: CB; WP: CS	March 12 2017	Import...
<input type="checkbox"/> WL: CB; WP: JS	March 5 2017	Import...
<input checked="" type="checkbox"/> Jesus Outside The Box - Sermon Series...	February 19 2...	Import...
<input type="checkbox"/> Jesus Outside The Box - Sermon Series...	February 12 2...	Import...
<input type="checkbox"/> Jesus Outside The Box-Sermon series - ...	February 5 2017	Import...
<input type="checkbox"/> Jesus Outside The Box - Sermon Series...	January 29 2017	Import...
<input type="checkbox"/> KIDS CHOIR - WL: CB; WP: ML	January 22 2017	Import...
<input type="checkbox"/> Justice Week: Laws Of Love - WL: CB;...	January 15 2017	Import...
<input type="checkbox"/> WL: CB; WP: ML	January 8 2017	Import...
<input type="checkbox"/> WL: CB; WP: Bobby Scott	January 1 2017	Import...
<input type="checkbox"/> WL: Cameron/Katie; WP: ML	December 18 ...	Import...
<input type="checkbox"/> WL:CB; WP: JS	December 11 ...	Import...
<input type="checkbox"/> RP Laws of Love; Advent (Peace) - WL...	December 4 2...	Import...
<input type="checkbox"/> Monte Starkes - WL: CB; WP: JS	November 27 ...	Import...

**Planning Center Plan**

Series Title: Jesus Outside The Box - Sermon Series

Plan Title: WL: CB; WP: JS

Service Times: Sunday, February 19, 2017 - 7:30 AM to 9:30 AM; Sunday, February 19, 2017 - 10:45 AM to 12:00 PM

MP Event: PCO-Jesus Outside The Box - Sermon Series - WL: CB mp

**People**

Person	Position
Collin	Worship Leader/AG Al
Ryan	Drum Line
Kurt	Electric Bass/MD
Katie	Worship Leader
Matt	Vocals
Jeff	Worship Pastor
Dan	Acoustic Guitar
Alex	Shadowing Drums
Leisa	Piano
Hayd	Electric Guitar
Sabr	Hanger 10:45 Usher/G
Lisa	Hanger 10:45 Usher/G
Tom	Hanger 10:45 Usher/G

**Event #48068: "PCO-Jesus Outside The Box - Sermon Series - WL: CB; WP: JS"**

Event Title \*: PCO-Jesus Outside The Box - Sermon Series - WL: CB; WP: JS

Event Type \*: Planning Center

Congregation \*\*: \*\*Perimeter Church

Location:

Meeting Instructions:

Description:

Program \*: Worship & Arts Activities

Primary Contact \*: Tool, PCO Integration

Participants Expected:

Minutes for Setup \*: 0

Event Start Date \*: 2/19/2017 7:30 AM

**Participants**

Display Name	Participation S...	Notes
i, Daniel	03 Attended	Acoustic Gu
Ryan	03 Attended	Drum Line
Kurt	03 Attended	Electric Bas
j, Hayd...	03 Attended	Electric Gui

Loaded MP event details successfully for Jesus Outside The Box - Sermon Series - WL: CB; WP: JS (27594511). OK.

# Plans to Events

## Instructions:

1. Check/select the service type(s) you wish to import. Highlight "All Linked Service Types" to select all.
2. Check/select the plan(s) you wish to import. Use the top checkbox to select all.
3. Review the information on the panel on the right.
4. Click the **Import Plan(s)** button to import, or click the **Ignore Plan(s)** button if you do not wish to import.
5. Once the plan and participants have been imported, the dots in the People list will change from red to green.

## Options:

Filter by plan name, only new plans, or show imported and/or ignored plans by using the **Filter By** area of the tool.

Click the **mp** button next to the MP Event field to go to the event record in Ministry Platform.

Planning Center Integration Tool - Organization: Perimeter Church

File Tools Help

People to Contacts Service Types to Programs **Plans to Events**

### Service Types

PCO Service Type	MP Program	# Plans	# Import...	# Ignored	# New ^
- All Linked Service Types -	- All Linked Programs -	957	542	406	9
Hanger(26073)	Worship & Arts Activities	65	64	0	1
Main Auditorium(27135)	Worship & Arts Activities	462	68	393	1
Sunday Night Watershed(31133)	Watershed Discipleship	29	20	9	0
Twenties(36577)	Young Adults	34	33	0	1
RUSH CONFERENCE(38453)	Rush	10	10	0	0
Chapel 10:45am(71355)	Worship & Arts Activities	72	68	3	1
Bricks(78263)	Bricks	31	31	0	0

### Plans for Hanger

Filter By  Clear

Show New Plans  Show Imported Plans  Show Ignored Plans

<input type="checkbox"/> Plan Name	Service Dates	Status
<input type="checkbox"/> WL: RC/KS - Impact Teens; WP: JS w/Infant Baptism	April 9 2017	Imported
<input type="checkbox"/> WL: CB; WP: Ryan Brown	April 2 2017	Imported
<input type="checkbox"/> WL: CB/KS; WP: JS	March 26 2017	Imported
<input type="checkbox"/> WL: RC; WP: ML	March 19 2017	Imported
<input type="checkbox"/> Adult Baptism - WL: CB; WP: CS	March 12 2017	Imported
<input type="checkbox"/> WL: CB; WP: JS	March 5 2017	Imported
<input checked="" type="checkbox"/> Jesus Outside The Box - Sermon Series - WL: CB; WP: JS	February 19 2017	Imported
<input type="checkbox"/> Jesus Outside The Box - Sermon Series - WL:ZK; WP: ML	February 12 2017	Imported
<input type="checkbox"/> Jesus Outside The Box-Sermon series - WL: CB; WP: ML	February 5 2017	Imported
<input type="checkbox"/> Jesus Outside The Box - Sermon Series - WL: CB; WP: Bryan Brown	January 29 2017	Imported
<input type="checkbox"/> KIDS CHOIR - WL: CB; WP: ML	January 22 2017	Imported
<input type="checkbox"/> Justice Week; Laws Of Love - WL: CB; WP: JS	January 15 2017	Imported
<input type="checkbox"/> WL: CB; WP: ML	January 8 2017	Imported
<input type="checkbox"/> WL: CB; WP: Bobby Scott	January 1 2017	Imported
<input type="checkbox"/> WL: Cameron/Katie; WP: ML	December 18 2016	Imported
<input type="checkbox"/> WL:CB; WP: JS	December 11 2016	Imported
<input type="checkbox"/> RP Laws of Love; Advent (Peace) - WL: JW; WP: ML	December 4 2016	Imported
<input type="checkbox"/> Monte Starkes - WL: CB; WP: JS	November 27 2016	Imported

### Planning Center Plan 3

Series Title  
Jesus Outside The Box - Sermon Series

Plan Title  
WL: CB; WP: JS

Service Times  
Sunday, February 19, 2017 - 7:30 AM to 9:30 AM  
Sunday, February 19, 2017 - 10:45 AM to 12:00 PM

MP Event  
PCO-Jesus Outside The Box - Sermon Series - WL: CB **mp**

### People 5

Person	Position
Collin	Worship Leader/AG A
Ryan	Drum Line
Kurt C	Electric Bass/MD
Katie	Worship Leader
Matt I	Vocals
Jeff S	Worship Pastor
Danie	Acoustic Guitar
Alex f	Shadowing Drums
Leisa	Piano
Haydi	Electric Guitar
Sabin	Hanger 10:45 Usher/G
Lisa E	Hanger 10:45 Usher/G
Tom I	Hanger 10:45 Usher/G

**4** Import Plan(s) Ignore Plan(s)

Loaded MP event details successfully for Jesus Outside The Box - Sermon Series - WL: CB; WP: JS (27594511). OK.