



Logging into Planning Center & Managing Your Small Group Roster

To log in to Planning Center Groups:

1. Go to groups.planningcenteronline.com
 - *Note: If you already have a Planning Center login, log in & skip to #6*
2. Enter your email address that Doxa would have on file and click on "need a password?" (Fig. 1)
3. Re-enter your email and click "Send Code". (Fig. 2)

Figure 1

A screenshot of the Planning Center login page. At the top is the Planning Center logo. Below it, the text "Planning Center" is centered. There are two input fields: the first contains "info@doxachurch.net" and the second is labeled "Password". Below these fields is a blue "Log In" button. At the bottom left, there is a link that says "Need a password?". A red dashed oval highlights this link.

Figure 2

A screenshot of the Planning Center verification code page. At the top is the Planning Center logo. Below it, the text "Email or Phone" is centered. There is an input field containing "info@doxachurch.net". Below this field is a blue "Send Code" button, which is highlighted with a red dashed oval. At the bottom left, there is a "Back" link.

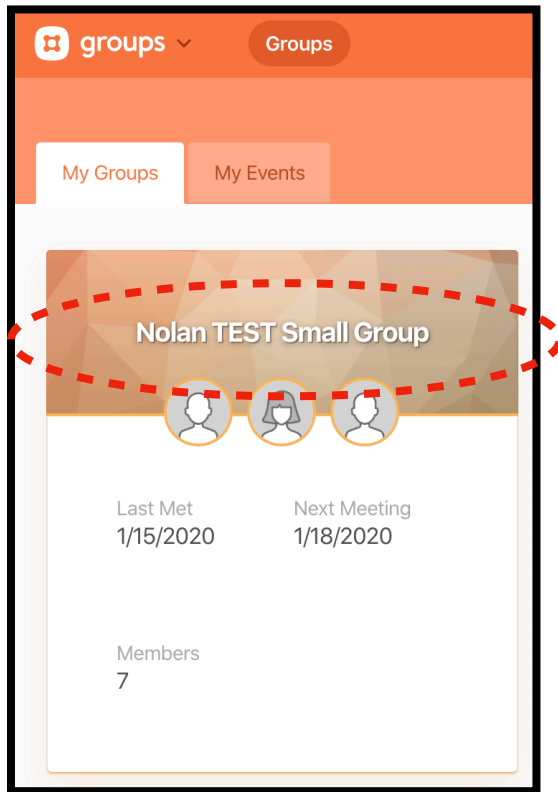
Figure 3

A screenshot of the Planning Center verification code entry page. At the top, there is a message: "We are sending a verification code to info@doxachurch.net. Please enter it below after you receive it." Below this message is an input field containing the number "826893". At the bottom, there is a blue "Continue" button, which is highlighted with a red dashed oval.

4. Planning Center will send a code to your email. Retrieve and enter it in the box. Click "continue". (Fig. 3)

5. This will take you to a screen to set your password. Click to set your password.
6. Once you are logged in you should be taken to a screen where you will see the group you are a leader of. Select your Small Group. (Fig. 4)

Figure 4

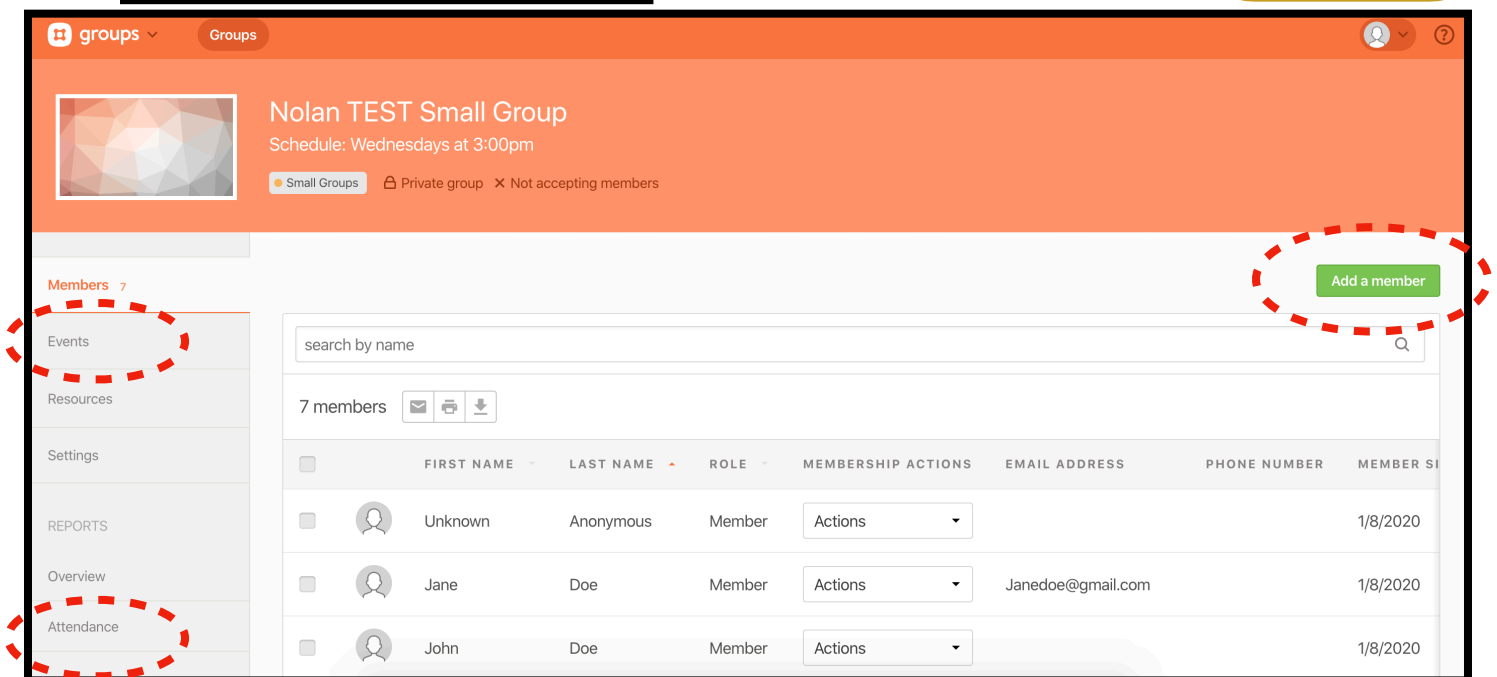


7. This will take you to your SG Roster page. (Fig. 5)

This is where you can:

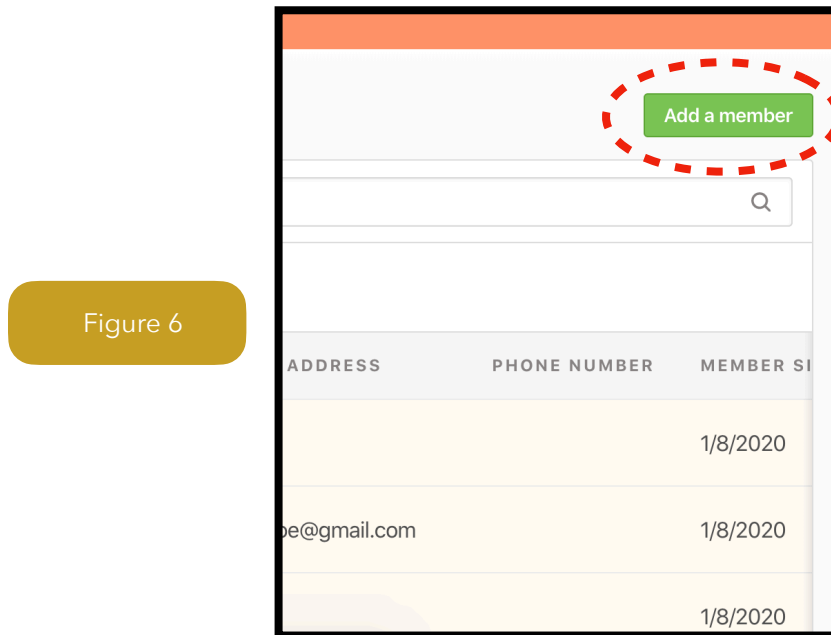
- Add a new member
- Access Attendance Reports
- Record attendance for any SG Mtgs.

Figure 5

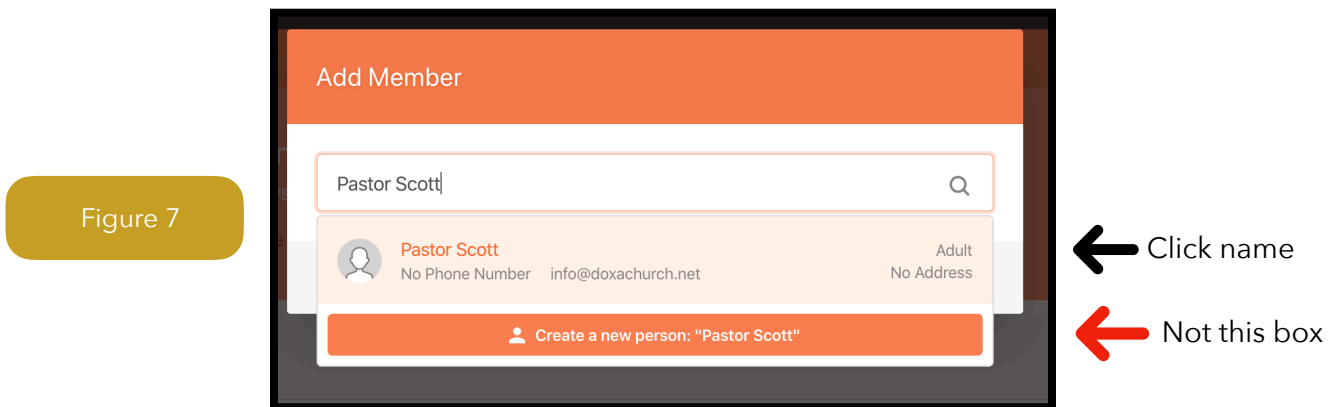


How to add a New Member to your group from your Small Group roster page:

Click on the "Add a member" button (Fig. 6)



Type in their name into the "Add Member" box. (Make sure your spelling is accurate.)

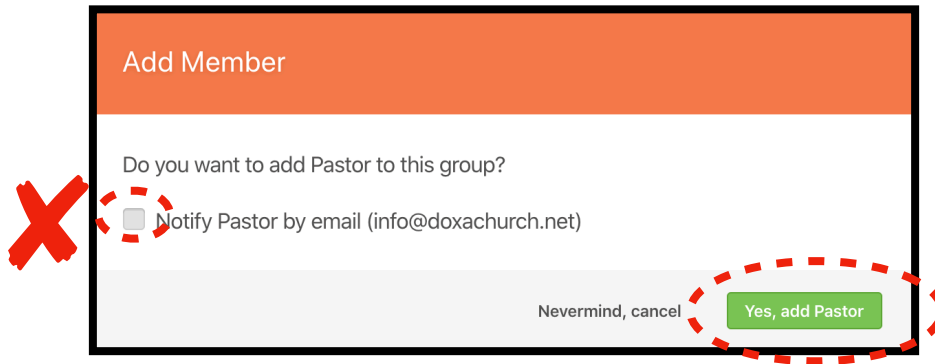


If they are in our database, they will show up as a potential match. (Takes a few seconds to pop up.) Click on their name (Fig. 7). This will automatically add them to your roster.

NEVER CLICK on the orange button to "Create a new person" in the database (Fig. 7). Only add people who show up as already being in our database.

Please **do not** click the box to notify the member by email. Group members are not using any features in Planning Center at this time. Just click the green “add member button”. (Fig. 8)

Figure 8



Add Member

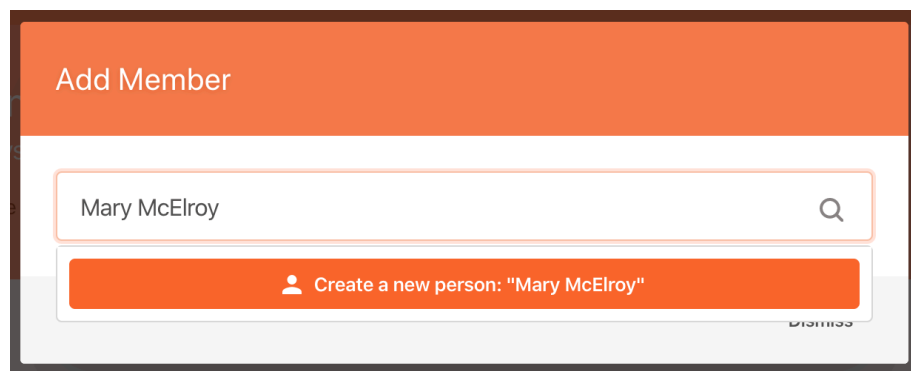
Do you want to add Pastor to this group?

Notify Pastor by email (info@doxachurch.net)

Nevermind, cancel Yes, add Pastor

If you would like to add someone to your roster but they don't seem to be in the database when you search (Fig. 9), reply to the attendance email and ask us to add this person to the database & your roster. They will show up on your next week's attendance.

Figure 9



Add Member

Mary McElroy

Create a new person: "Mary McElroy"

How do I take attendance for a past Small Group meeting?

- When looking at your SG Roster page, click on the "Events" tab on the left of your screen.
- Scroll down and select "Report Attendance" for the Small Group meeting that you would like to take attendance for. (Fig. 10)

Figure10

DATE & TIME ▾	EVENT ▾	STATUS	RSVP
1/8/2020 3:00 pm - 5:00 pm	Nolan TEST Small Group 🗄	<input type="button" value="Report Attendance"/>	Not Requested
1/11/2020 11:00 am - 1:00 pm	Nolan Small Group Mtg. 🗄	5 of 7	Not Requested
1/15/2020 3:00 pm - 5:00 pm	Nolan TEST Small Group 🗄	0 of 7	Not Requested
1/18/2020 11:00 am - 1:00 pm	Nolan Small Group Mtg. 🗄	Has not started yet	<input type="button" value="Request now"/>

How do I see attendance reports for my group?

- When looking at your SG Roster page, click on the "Attendance" tab under the Reports header on the left of your screen. (Fig. 11)

Figure11

Members 7		Attendance Report					
Events		Last 30 days ▾		<input type="checkbox"/> Show removed members			
Resources		FIRST NAME ▾	LAST NAME ▾	% ▾	JAN 08	JAN 11	JAN 15
Settings		John Doe		0%			
REPORTS		Pastor Scott		0%			
Overview		Katie Nolan		50%		✓	
Attendance		Jane Doe		50%		✓	
		Unknown Anonymous		50%		✓	

Additional Note:

Please do not change any of the "Settings" from the tab on the left sidebar. Let us know if you think there needs to be any changes to your current settings.