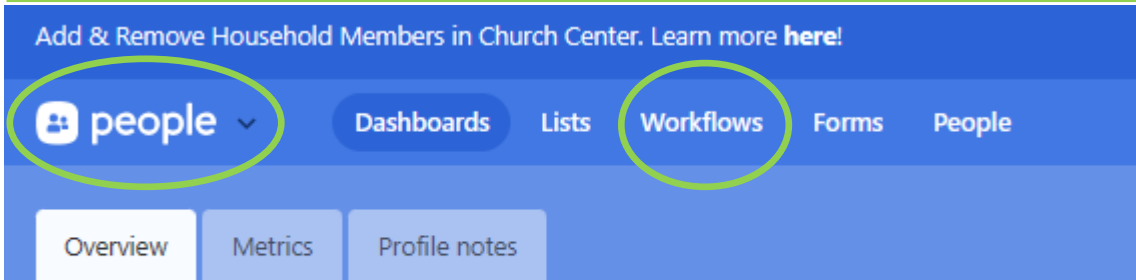


Guide to Workflows

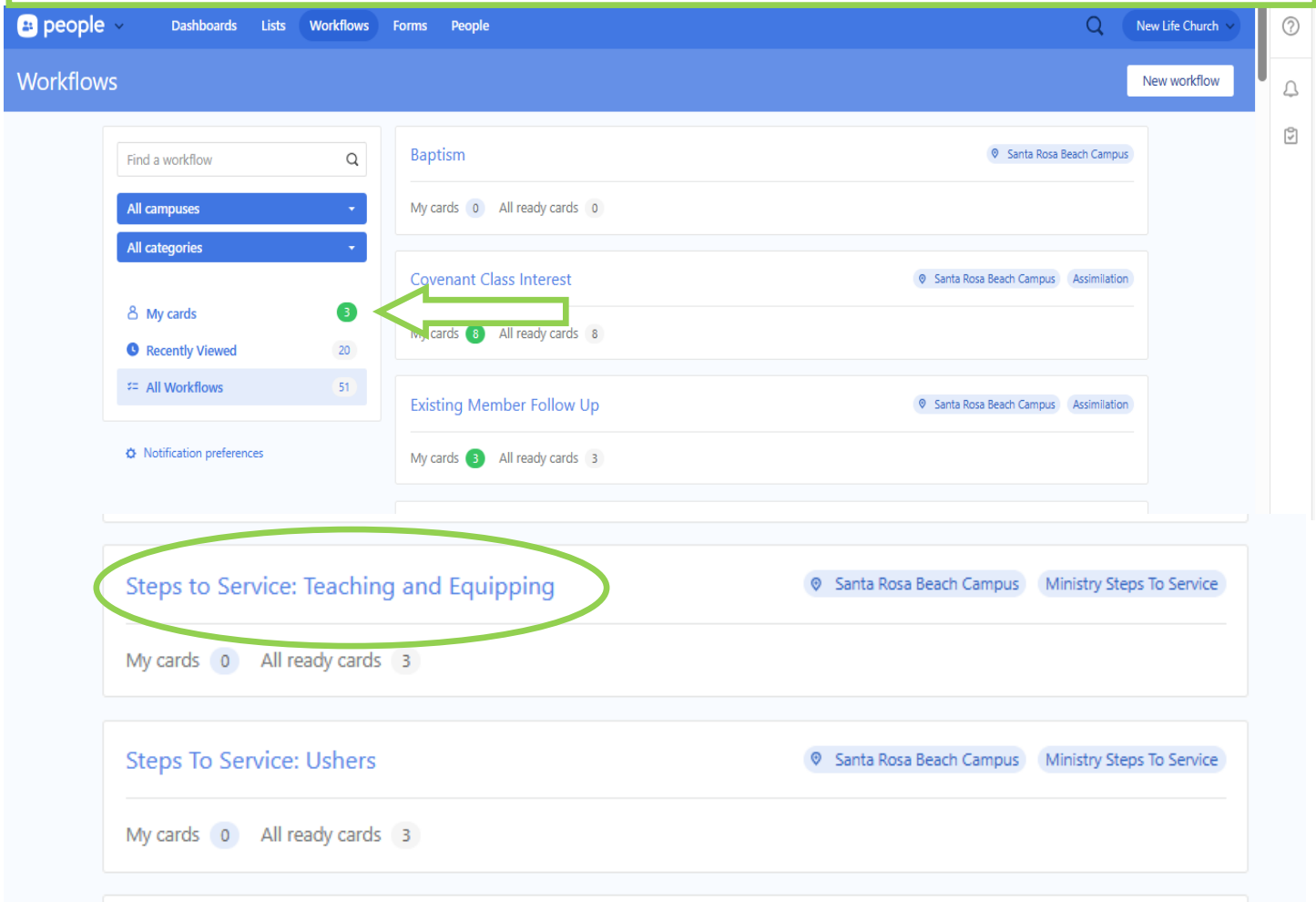
- Log into Planning Center Online through your browser and navigate to the People module by clicking on the drop down menu top left and selecting People.
- Once on People, click on Workflows from the menu bar.



Demographics

Membership types

The Workflow page allows you to filter by Campus, Categories, Your Cards, Recently Viewed and All Workflows. You can either scroll to the Workflow you need or click on My cards for a shortcut.



Guide to Workflows

- Once you click on your workflow, you will see instructions on how to complete each step.
- You will see the different steps in the workflow. You can click on the steps to access each one as they are hyperlinked.

Steps to Service: Teaching and Equipping Edit workflow

Add someone to workflow

1) Introduction and Verification 1

2) Assimilation (Evaluation & Orientation) 2

Completed 45

Steps

Instructions

Introduction and Verification

Default assignee: Julie Sellers

A. Contact the possible volunteer ASAP by phone and thank them for expressing interest in your ministry. Text or email should only be if you can't reach them directly.

B. Let them know what to expect by explaining the process of getting involved in your area of ministry

C. Verify they have completed our Covenant Classes. See below. If they have not, advise them of the next class and ADD a Workflow to Covenant Class Interest and the Assimilation Team will contact them with more information

D. Verify if they have completed a Member Information form. See below. If not, send them this link <https://people.planningcenteronline.com/forms/231762/submissions/11608760> or text the word MEMBER to 850-404-7404

How to Verify Covenant Class completion

- Go to their profile in the People App
- On the left choose the Covenant Class tab
- The "Completed" section options are "YES," "NO," or "No answer given" attended and completed Covenant Class.

How to verify Member Information form

- Go to their profile in the People App
- On the left choose the Forms tab and verify if one has been received

Collaborators

GROUPS

- All managers Manage workflow
- All editors and above Edit all cards

- Scroll down past the Instructions and you will see your active cards.
- Click on the View Card button to open the Card.

Collaborators

GROUPS

- All managers Manage workflow
- All editors and above Edit all cards

INDIVIDUALS

- Lisa Woodrum Edit all cards
- Arin Singer Edit all cards
- Julie Sellers Edit all cards
- Scott Sellers Edit all cards

Add collaborator

How to verify Covenant Class completion

- Go to their profile in the People App
- On the left choose the Covenant Class tab
- The "Completed" section options are "YES," "NO," or "No answer given" attended and completed Covenant Class.

How to verify Member Information form

- Go to their profile in the People App
- On the left choose the Forms tab and verify if one has been received

Cards assigned to: Julie Sellers

Ready 1 Snoozed 0

Select all Sort by: Oldest first

Workflow Card Here

View card

Added to step 2 days ago


Guide to Workflows

- Once you open the card, you can see notes that the person that sent you the card has written on the workflow.
- You will add your own notes under the “Add internal note” tab. Notes added to workflows will stay on the workflow only and not be added into the person’s profile unless you click the box next to the option “Save to profile”, Save your notes to the profile if it would be beneficial for another person to know what step you are on or a bit of information you needed to share. The notes are available for all to see, so please do not put confidential information in the note field.
- You can also send an email from the workflow. The email you send will have a record on the workflow and in the communications tab of the profile. If the respond to an email sent from within the system, you will receive that email to the email address you have on file in your profile.
- Under perform action, you can send workflows to other people, send email templates, add people to a group or register them for events etc .
- If you need to save the card at this step and follow up at a later time, you can Snooze the card for your desired length of time. You will get a notification when the card is active again to prompt your follow up.
- You have the ability to skip a step if it is a multi step workflow.

The screenshot displays a workflow card interface. At the top, three tabs are visible: "Add internal note", "Send email", and "Perform action", all of which are circled in green. Below the tabs is a text input field labeled "Your note" with a small icon of a person on the left. Below the input field is a checkbox labeled "Save this note to Caron's profile", which is also circled in green. Below the checkbox is a "save note" button. To the right of the note field is a "Snooze" button with a green arrow pointing to a "Snooze..." dropdown menu. Below the dropdown menu are three buttons: "Remove Caron from workflow" (red), "Skip this step" (orange), "Reassign card" (blue), and "Take it" (blue). Below the "Reassign card" and "Take it" buttons is a "Pin assignment" checkbox with an information icon. Below the "Pin assignment" checkbox is a "Snooze..." dropdown menu. Below the "Snooze..." dropdown menu are three buttons: "Remove Caron from workflow" (red), "Skip this step" (orange), "Reassign card" (blue), and "Take it" (blue).

CARD HISTORY

 A notification email was sent to Julie Sellers.
2 days ago

 Rachel Boyles created a new note.
2 days ago

[Remove...](#)

She is active in outreach, attended the H&D Workshop and has registered and attended Women's events. Spiritual gifts test notes evangelism and teaching. She is also taking the Foundations Class online. I called and spoke to her and she has taught in the past and would

Guide to Workflows

- Once you finish a step in the workflow, it will send your card to the next step.
- You can access the next step by clicking the hyperlink on the left hand side of the screen (page 1 of this guide or below)
- You will work through the steps until complete. Once finished you will click Complete Steps and close the card.

WORKFLOW: COVENANT CLASS INTEREST

Current Step: Interest Follow-Up

These are people have expressed an interest in being set into our church. Call and/or email them an invitation to the upcoming classes

Next Step: Card is complete

Complete step

Add internal note Send email Perform action

Choose Action

Application People ▾

Currently assigned to **Rachel Boyles**

Reassign card

Pin assignment ⓘ

If you want to go back and see the closed workflows, you can click the completed hyperlink. From there, you can sort the completed cards from oldest to newest and vice versa.

Add someone to workflow

1) Introduction and Verification	1
2) Assimilation (Evaluation & Orientation)	2
Completed	45

Add a step Reorder steps

Assigned to you Assigned to others

Hyperlinks to Steps

View Completed Cards

Total Number of Cards