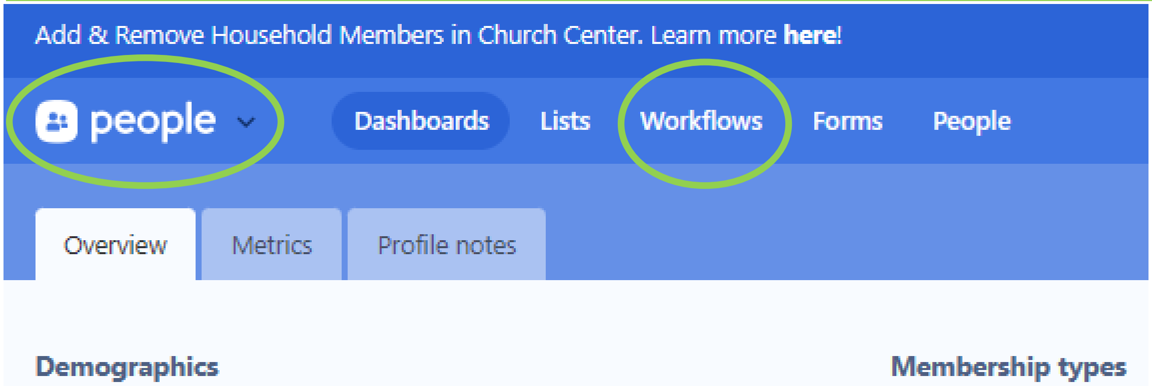
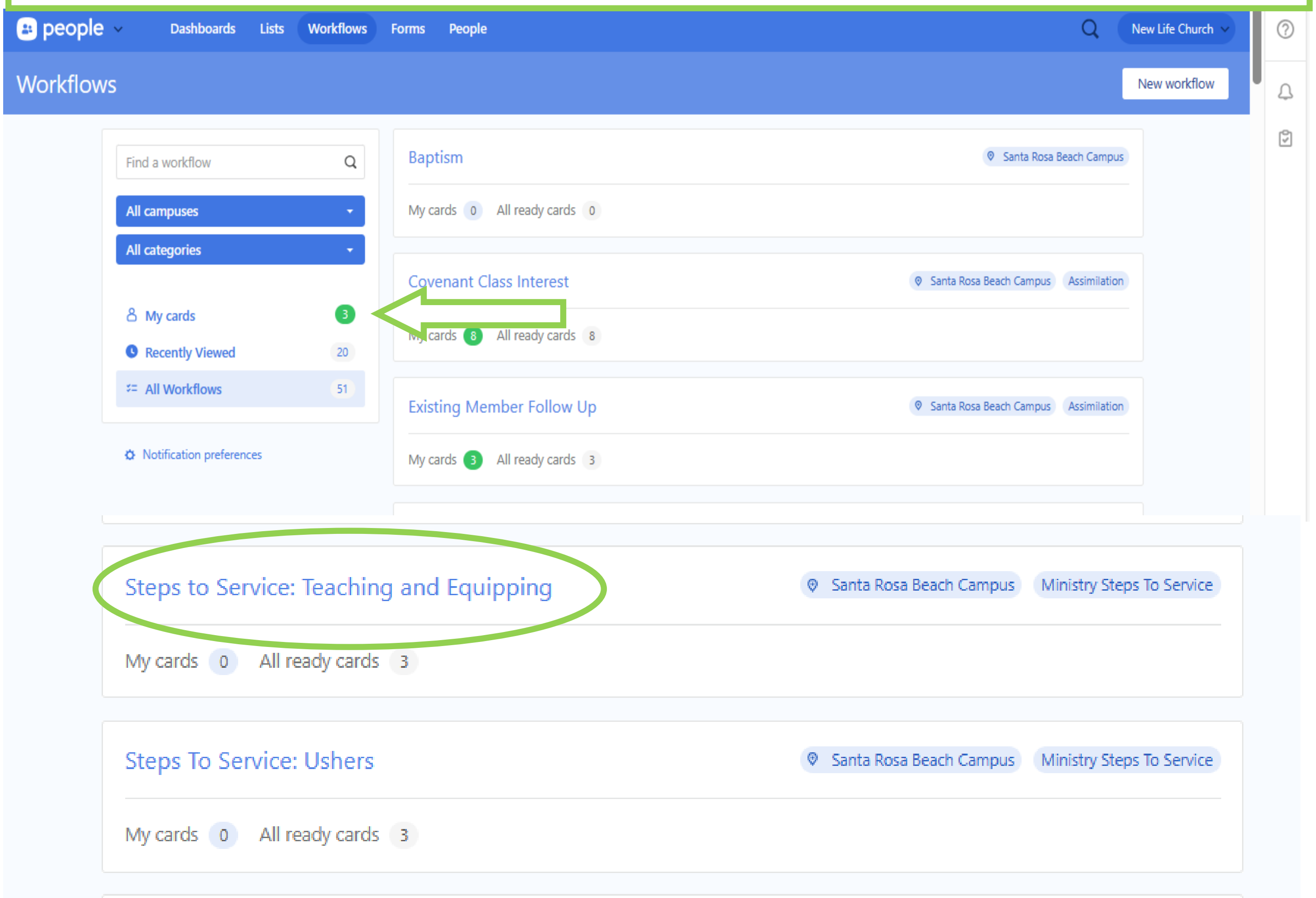
Guide to Workflows

- 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.

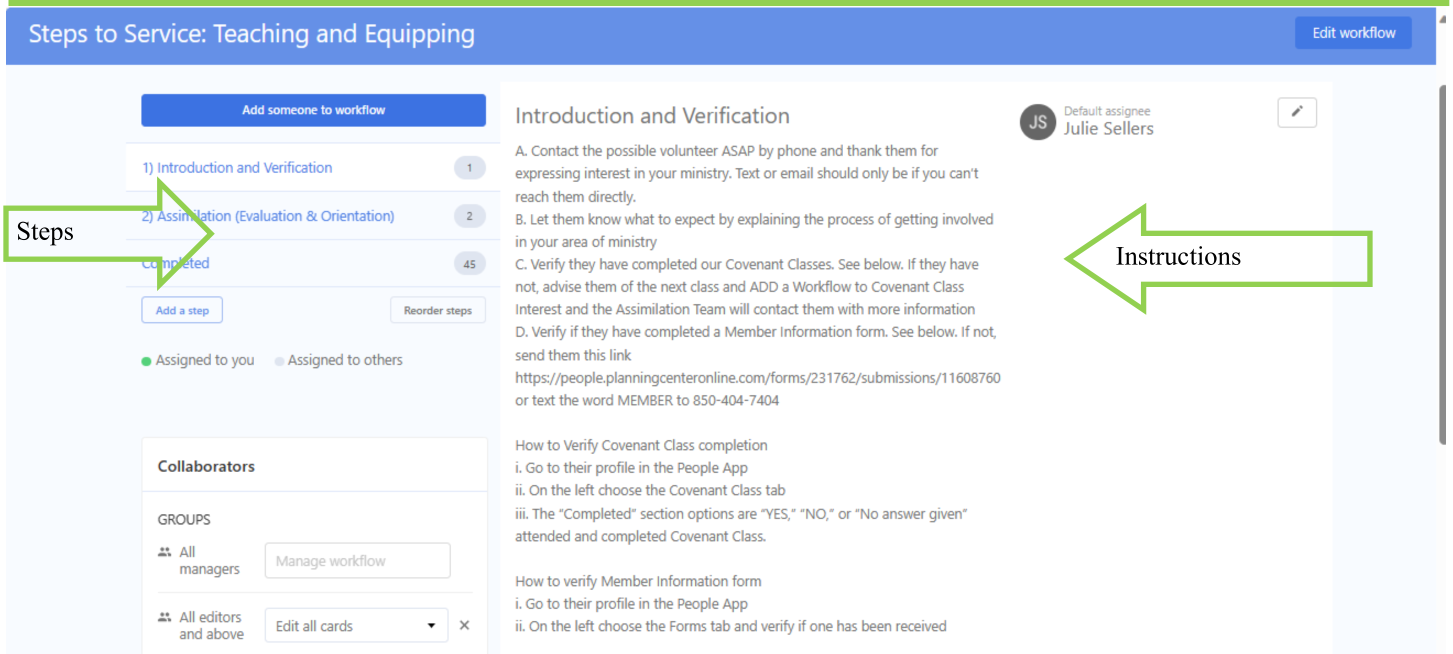


The Workflow page allows you to filter by Campus, Categories, Your Cards, Recently Viewed and All Workflows. You can either scroll to the Workflow you need or click on My cards for a shortcut.

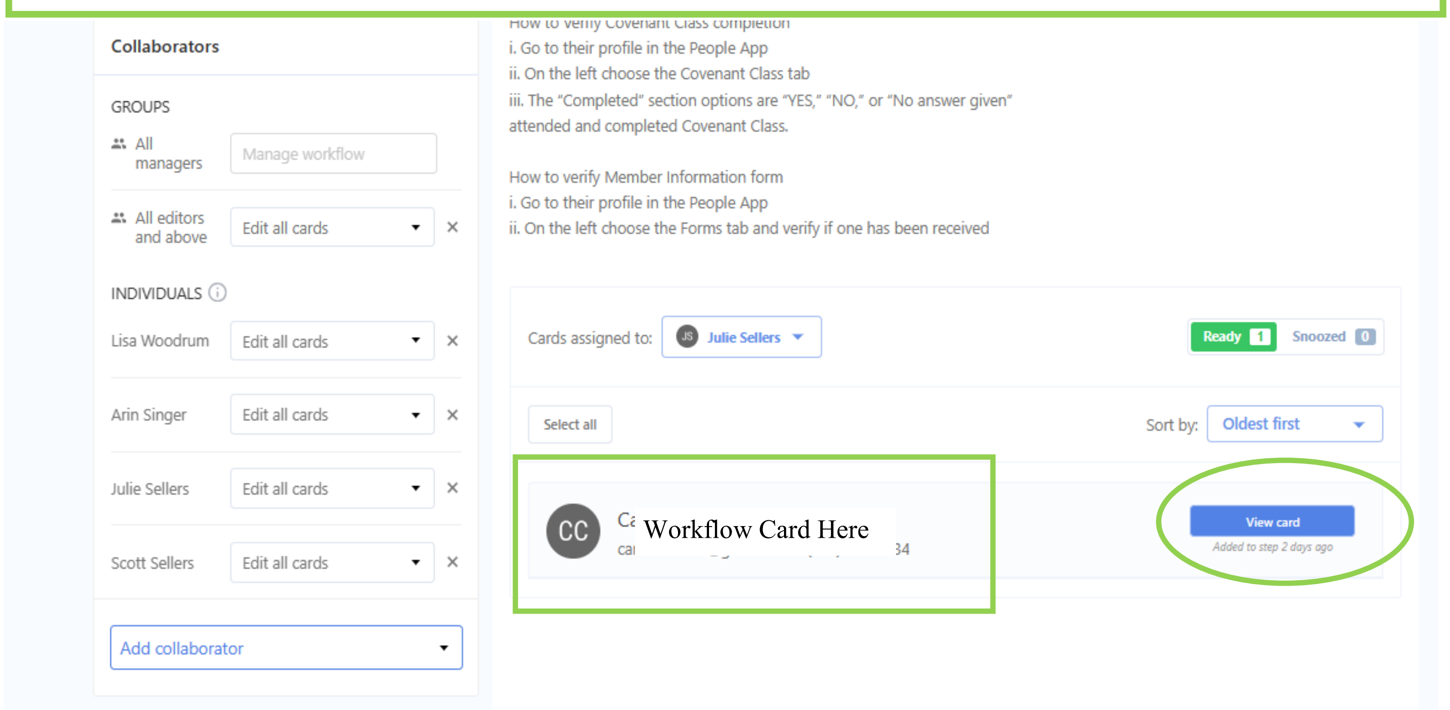


Guide to Workflows

- 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.

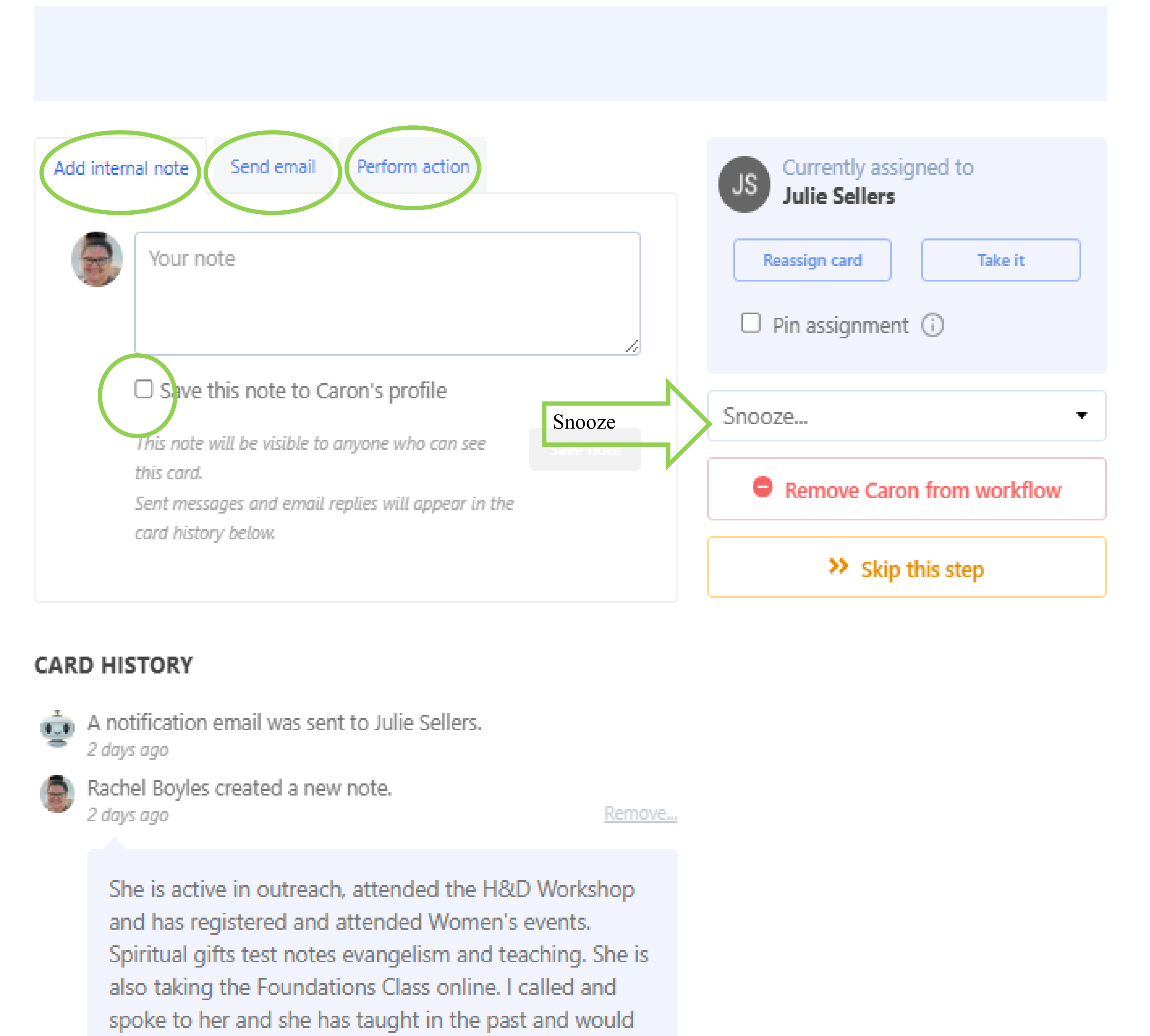


- Scroll down past the Instructions and you will see your active cards.
- Click on the View Card button to open the Card.



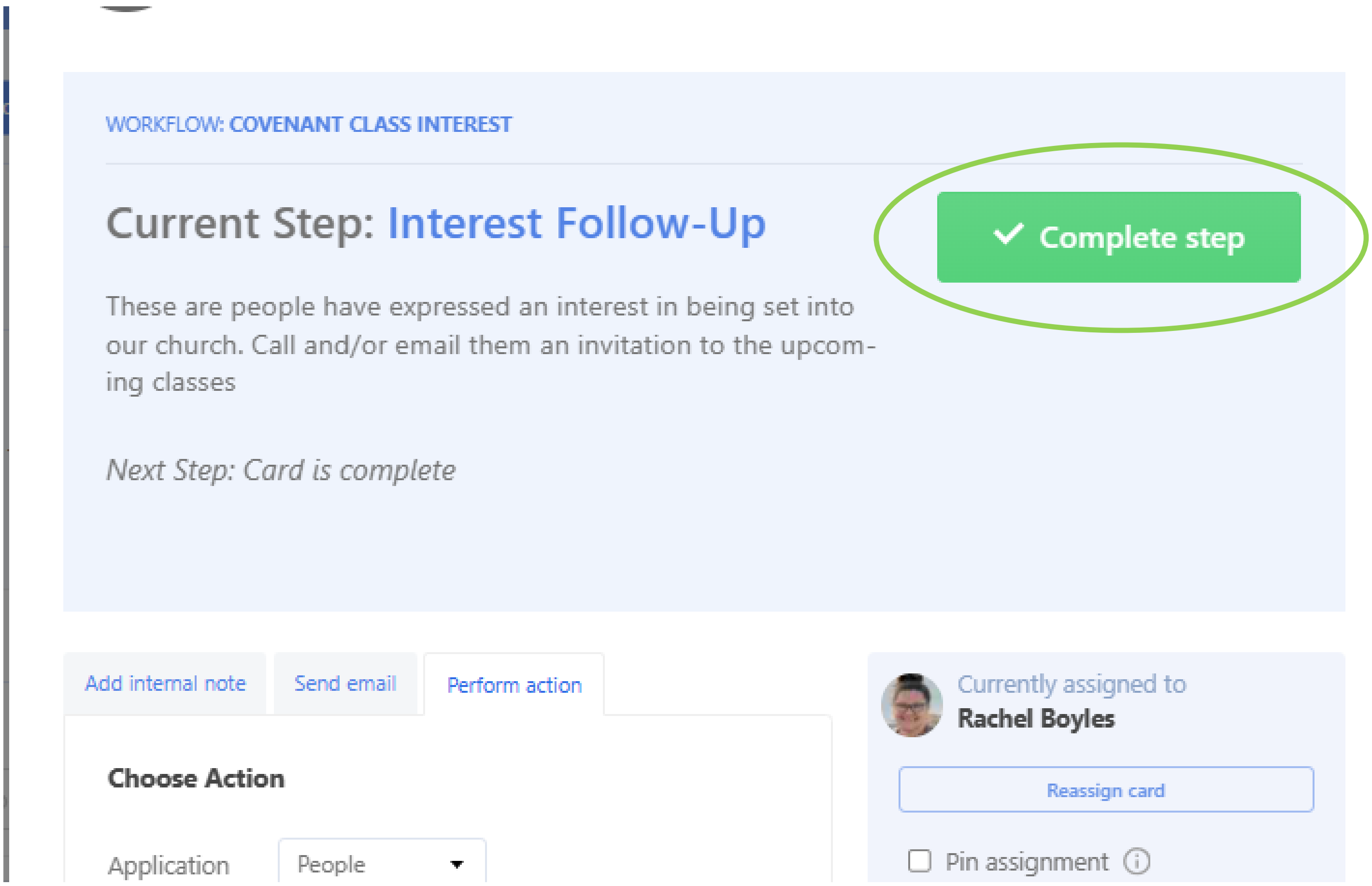
Guide to Workflows

- 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.



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.



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.