PCO CONNECT

Integrate Your Planning Center Data with MinistryPlatform
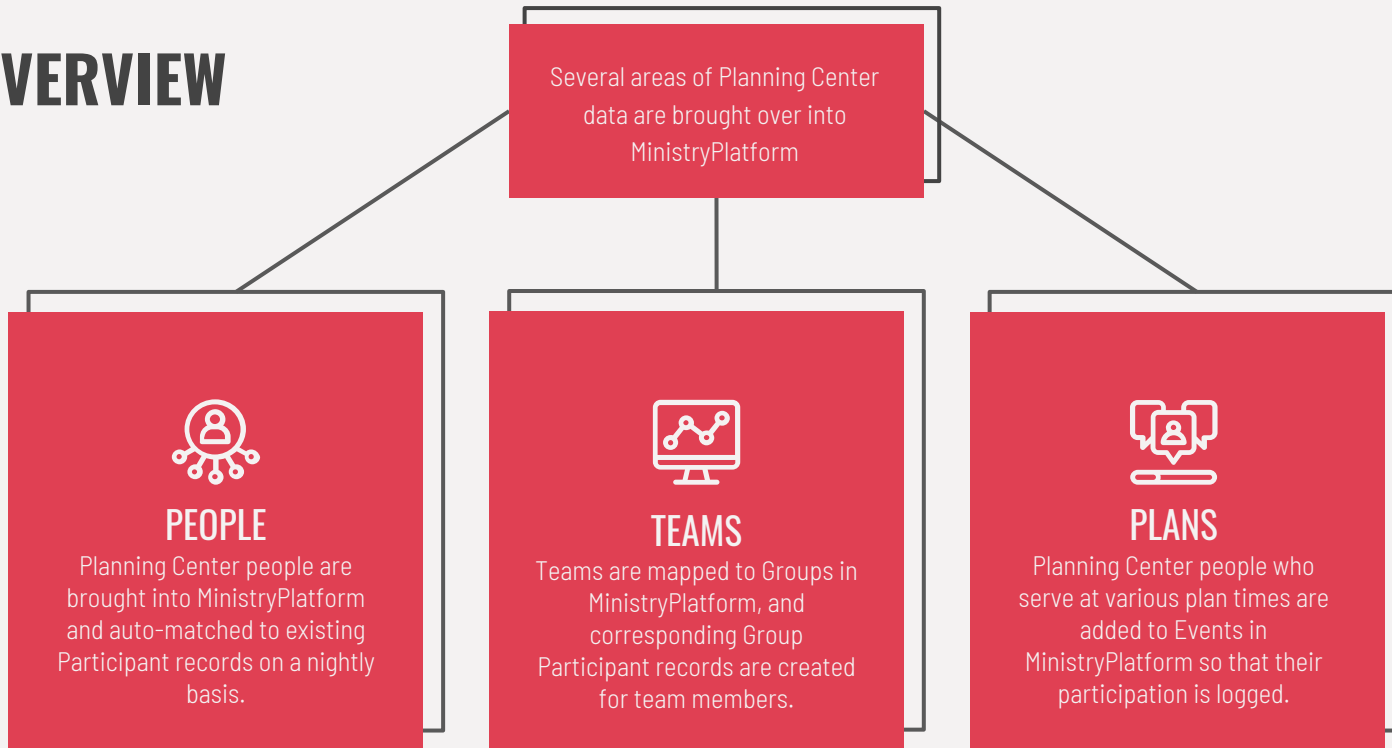
2

SUMMARY

01

OVERVIEW

OVERVIEW

PCO Connect pulls Planning Center data into MinistryPlatform so that people data, serving information, and participation information from Planning Center are integrated into MinistryPlatform.

OVERVIEW

Several areas of Planning Center data are brought over into MinistryPlatform

PEOPLE
Planning Center people are brought into MinistryPlatform and auto-matched to existing Participant records on a nightly basis.

TEAMS
Teams are mapped to Groups in MinistryPlatform, and corresponding Group Participant records are created for team members.

PLANS
Planning Center people who serve at various plan times are added to Events in MinistryPlatform so that their participation is logged.

5

02
IMPLEMENTATION

IMPLEMENTATION

PCO Connect
- Campuses
- People
- Service Types
- Teams
- Team People
- Plans
- Plan Times
- Plan Time People
- PCO Configuration Settings

NEW SECTION

DATA UPDATES

PCO Connect runs at night and pulls down the latest changes from Planning Center into MinistryPlatform. The initial run (first night) pulls down all data dating back to the date specified in a configuration setting. Thereafter, only daily changes are pulled into MinistryPlatform.

FIRST TIME SETUP

DEVELOPER ACCESS

Remote access to the server for installation
Training is provided, typically 30-60 minutes

HOMEWORK

You can match unmatched Planning Center people records with Participant records, as well as linking Service Times to Programs and linking Teams to Groups.

03
MAINTENANCE

Quick Add

- Events
- Milestones
- Opportunities
- People Lists
- Staff Stuff
- Church Structure
- Facilities
- Communications
- Counseling
- Custom Forms
- Mission Trips
- Stewardship
- Products & Payments
- Lookup Values
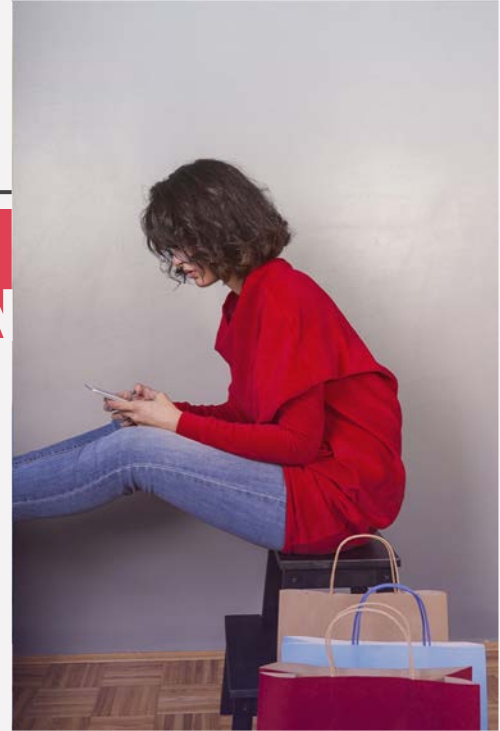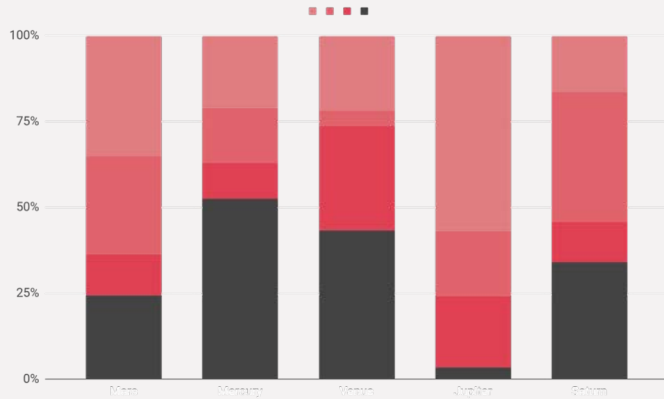- PCO Connect
  - Campuses
  - People
  - Service Types
  - Teams
  - Team People
  - Plans
  - Plan Times
  - Plan Time People
  - PCO Configuration Settings
- Care Cases
- Administration
- System Setup
- System Lookups

New   Assign   Delete   Tools ▼   Grid ▼   Print   Refresh

in View   All Records ▼

Selection: All Records ▼   Clear   Save   XFer

		Date Updated	Campus ID	Campus Name	Congregation	Date Created	Date Refreshe...
☐	●	6/28/2018 1:45...	23473	Pawnee Central	Pawnee Central	6/28/2018 1:44...	11/11/2019 7:4...
☐	●	6/28/2018 1:43...	23472	Eagleton	Eagleton	6/28/2018 1:43...	11/11/2019 7:4...

2 results found in All Records

0 selected

MAINTENANCE

1. Stored procedure matches PCO people with MinistryPlatform participants each night
2. You can manually match unmatched PCO people
3. Create new contact, participant, and household records using the People Import core tool

CREATING NEW CONTACTS

CORE TOOL

The People Import core tool enables you to create new Contact, Participant, and Household records for a selection of unmatched planning center people.

Core Tool - PCO People Import

Person ID	Name	Email	Mobile
32676301	Kale, Caylee	Zach@mychurch.org	414-555-1212
37705783	Kavanaugh, Amy	Hannah Grace@mychurch.org	414-555-1212
56751696	Kadner, Jon	Makayla@mychurch.org	414-555-1212
62445663	Kaczynski, Ginger	Logan@mychurch.org	414-555-1212
62706931	Kaser, Amber	Natalyn@mychurch.org	414-555-1212

Showing 1 to 5 of 5 entries

Begin   Close

DATA QUALITY

UNMATCHED PEOPLE

Manually match your unmatched PCO people.

MISMATCHED EMAIL

View PCO people records where email address or other contact information does not match MinistryPlatform.

TEAMS

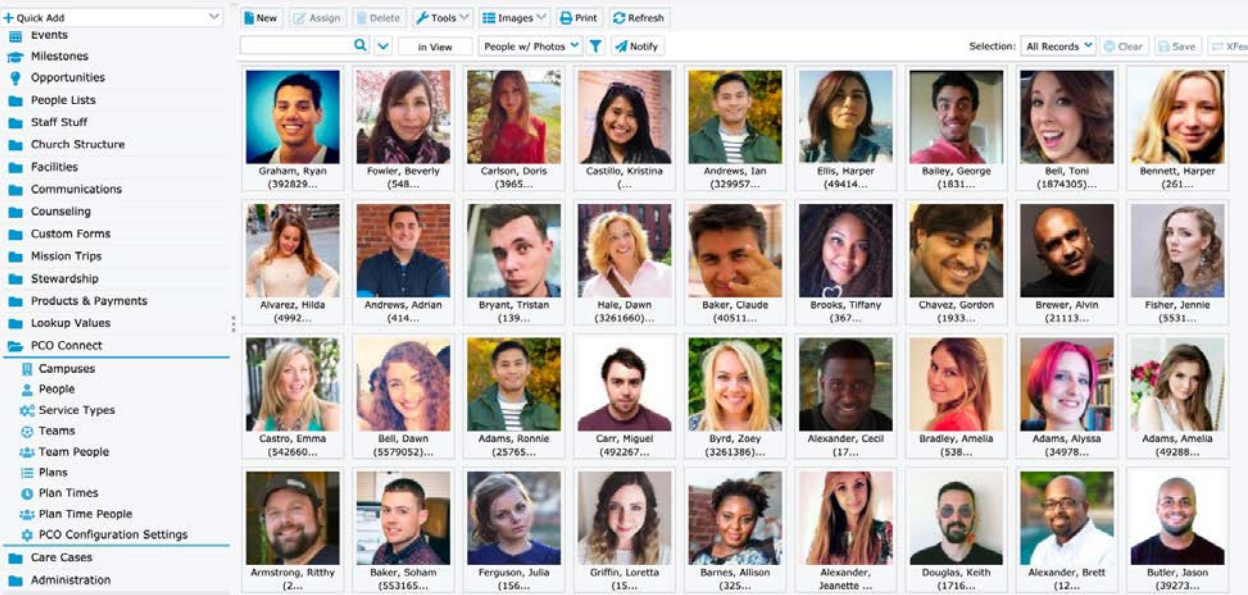Link your PCO teams to groups in MinistryPlatform

SERVICE TYPES

Link your PCO service types to programs in MinistryPlatform

CONFIGURATION SETTINGS

		Application Co...	Key Name	Value	Description
☐	🟢	PCO Connect	PCOAppID	aweirdvalue	PCO username
☐	🟢	PCO Connect	PCOPassword	aweirdvalue	PCO password
☐	🟢	PCO Connect	UseLogFile	True	For developer use; creates log files for PCO Connect activity
☐	🟢	PCO Connect	MPAPIUserID	195	User ID for PCO Connect changes in the audit log
☐	🟢	PCO Connect	APIUpdateMaxRecords	500	API setting
☐	🟢	PCO Connect	OutputVerbosity	3	For developer use; relates to log files
☐	🟢	PCO Connect	DaysSince	3	Pull changes in PCO within this date range
☐	🟢	PCO Connect	PCORecordsPerPage	25	API setting
☐	🟢	PCO Connect	GroupRoleID	3	Group Role ID for new group participant records
☐	🟢	PCO Connect	EventTypeID	7	Event Type ID for new event records
☐	🟢	PCO Connect	CongregationID	1	Congregation ID for new household records
☐	🟢	PCO Connect	PrimaryContact	2	Event primary contact for new event records
☐	🟢	PCO Connect	MinutesForSetup	0	Minutes for Setup for new event records
☐	🟢	PCO Connect	MinutesForCleanup	0	Minutes for Cleanup for new event records
☐	🟢	PCO Connect	Cancelled	False	Cancelled field for new event records
☐	🟢	PCO Connect	VisibilityLevelID	1	Visibility Level ID for new event records
☐	🟢	PCO Connect	PlanTimesSince	1/1/2016	Pulls plan times from this date forward
☐	🟢	PCO Connect	TimeTypes	service	Pulls these time types from PCO; use comma delimited format for multiple time types
☐	🟢	PCO Connect	DefaultEventTitle	PCOConnect Im...	Default event title when plan time name is NULL
☐	🟢	PCO Connect	DefaultGroupID	2200	Default group for participants not on a team in PCO
☐	🟢	PCO Connect	ConfirmedParticipantStatusID	3	Participation Status for new event participant records when PCO status is confirmed
☐	🟢	PCO Connect	DeclinedParticipantStatusID	5	Participation Status for new event participant records when PCO status is declined
☐	🟢	PCO Connect	UnconfirmedParticipantStatusID	2	Participation Status for new event participant records when PCO status is unconfirmed
☐	🟢	PCO Connect	DistinctEventParticipantsLevel	2	Determines how many event participant records per service when someone plays multiple roles...
☐	🟢	PCO Connect	DefaultPCOConnectSourceName	PCO Connect	Text appended to Notes fields on new records
☐	🟢	PCO Connect	HouseholdSourceID	39	Household Source for new household records
☐	🟢	PCO Connect	ParticipantTypeID	18	Participant Type for new participant records

View all of your lovely Planning Center photos in MinistryPlatform!

PCO PHOTOS

04

FAQ

SYNCHRONIZATION: WHAT GETS UPDATED

PCO TO MINISTRYPLATFORM

PCO Connect records are created in MinistryPlatform
> People
>
> Teams and team people
>
> Plans, plan times, and plan time people
>
> Campuses

MinistryPlatform is updated
> New contacts, participants, and households from People Import core tool – controlled by you
>
> Group participant records created for Planning Center teams linked to MinistryPlatform groups
>
> Events and event participant records created for Planning Center plan times and Planning Center plan time people

The PCO Connect tool does not update contact information in MinistryPlatform to reinforce the objective that MinistryPlatform is your central database. You can use data quality views to identify mismatched email addresses, phone numbers, and more.

PCO Connect does not update any information in PCO.

Currently, PCO Connect updates MinistryPlatform nightly. Webhooks would enable updates in real time and is under consideration.

WEBHOOKS

FUTURE RELEASES

TAGS

Adding PCO tags to PCO Connect is currently under development.

MULTIPLE ACCOUNTS

Several customers have multiple PCO accounts. Accommodating these customers is under development.

GROUPS

Several customers have inquired about adding PCO Groups integration. This feature is under consideration.

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CONTACT

THANK YOU

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