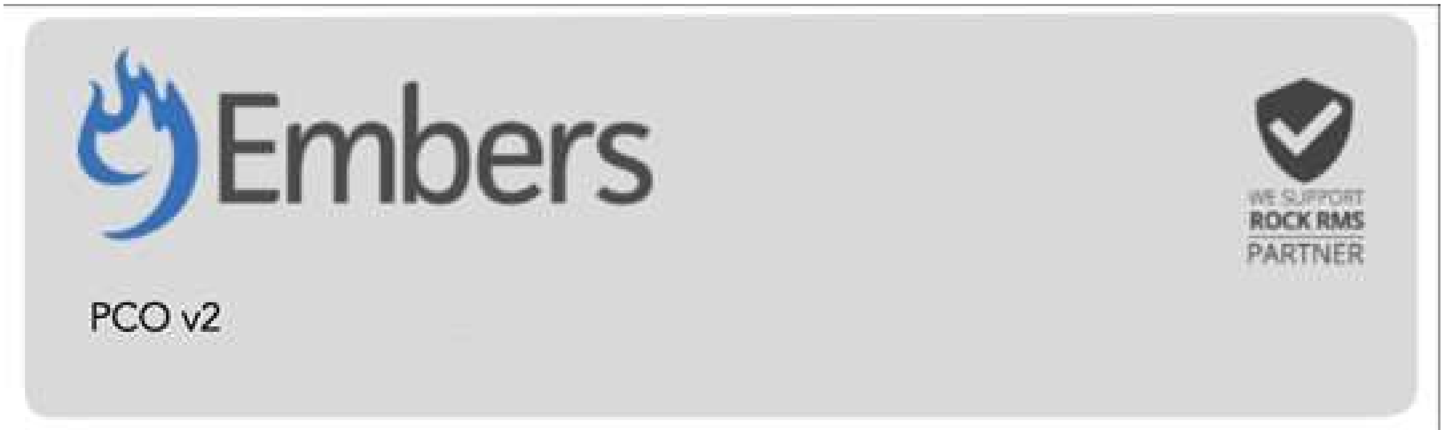


Requires v14.0 of Rock RMS and above.
Requires a 9 Embers subscription to the Planning Center Online (PCO) v2 Sync.

Overview

With PCO v2, you can ensure a unified and consistent data management experience. This plugin offers true two-way synchronization between Planning Center Online (PCO) and Rock RMS. This means no information is lost, and all team data is accurately reflected in both Rock and PCO. An update in one system is mirrored in the other.

In this latest plugin, you'll find enhanced functionality, greater manageability, and improved benefits, making it easier to maintain accurate and up-to-date information across both Planning Center Online and Rock RMS.

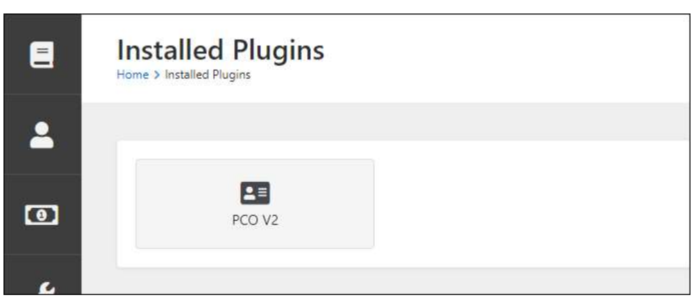
Functions:
• True 2-way sync
• Options to review and either apply or revert a sync.
• Assistants to help with sync and job configuration.

Setup

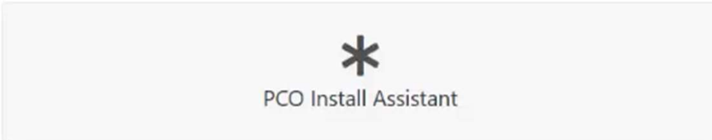
After installing the plugin from the Rock shop, you’ll need to do some basic setup to configure Rock to communicate with PCO.

1. Navigate to **Admin Tools > Installed Plugins.**

2. Locate the “PCO v2” plugin. *You may see the older Planning Center Online plugin if it is installed. This will be removed in one of the setup steps.

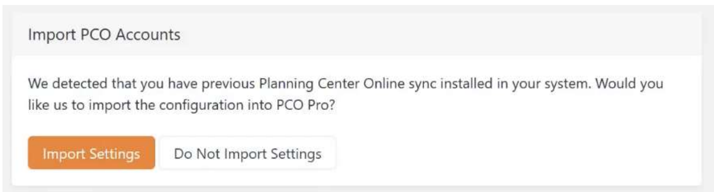


3. Click on the PCO v2 button, then click on the **PCO Install Assistant** to set up your plugin.



4. Follow the steps for setup. The plugin will recognize if you already have an account with PCO.

   If you have the previous PCO Sync installed, we recommend using the **Import Settings** button to import your existing PCO Account and Person Mapping configuration into PCO v2. If you prefer to manually set things up, you can choose **Do Not Import Settings**. You can manually add your accounts from the **Manage Accounts** option on the PCO v2 dashboard.

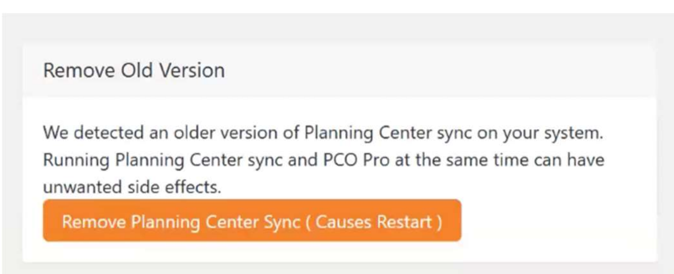
   If you do not have the previous PCO Sync installed, you will be asked to enter your Planning Center Online Account Id and Secret. The screen will provide a link to your PCO Developer Application page where you can create or use an existing Personal Access Token.

5. The next prompt will ask for your 9 Embers Account to PCO v2. If you do not have an account, follow the link to Contact Us. 9 Embers will help you to setup a subscription and provide you with the keys to continue.

6. Once you enter the Keys, the plugin will immediately validate them or indicate if the credentials are not valid.

7. Configure the system job that syncs PCO data to Rock. The on-screen prompts will allow you to set a frequency (hourly, daily or weekly) and the times without having to navigate to the system jobs section in Rock.

8. Next, you will be prompted to **Remove Planning Center Sync** if you had the previous sync plugin. This will remove files, blocks, and pages associated with the prior plugin. This action will restart Rock.

9. Additional Credentials can also be added in the **Manage Accounts** section of the plugin.
   a. Get additional credentials in Planning center from the Oath/applications in Planning Center.
   b. Add a Personal Access Token in Planning Center from the oauth/Applications page once your PCO v2 account is set up in Rock.

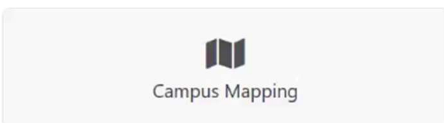
Note: When you add a new personal access token, the new token will have the same permissions as the person setting the token. When adding the personal access token, all the "Versions" sections will be filled in automatically as this is provided by the plugin.

The **Application ID** and **Secret** are provided in the Personal Access Tokens section. You will copy this information to the new account you are adding in the **Manage Accounts** section in PCO v2 in Rock.

Additional Settings and Information

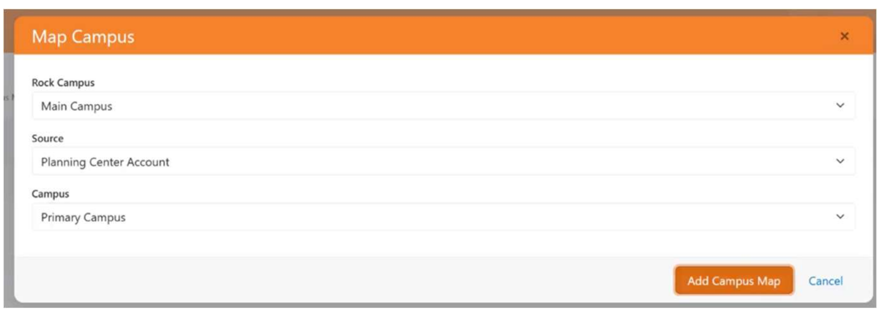
After completing the initial setup, you will customize and manage additional settings to enhance the functionality of PCO v2.

Campus Mapping



1. Navigate to the **Campus Mapping** Section.

2. Add each campus to map with PCO. You can add or remove campuses as needed.



Assistants

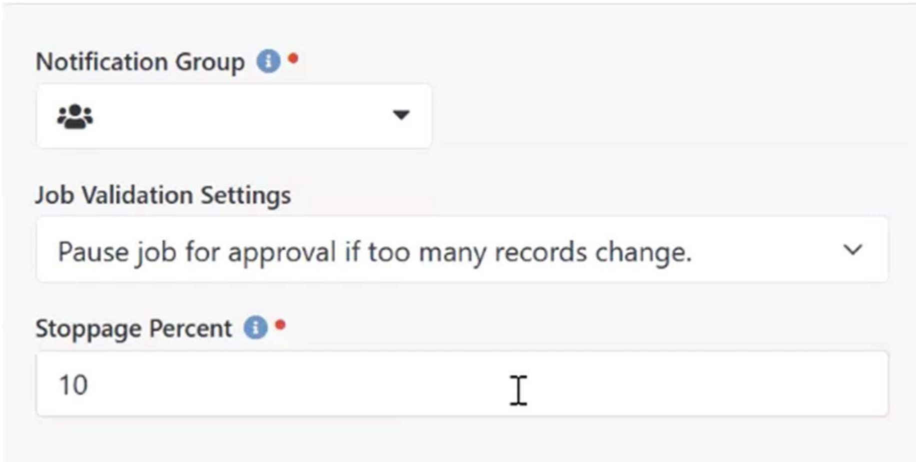
In this area you'll be able to access information for administrative management.

• Plugin Version Information

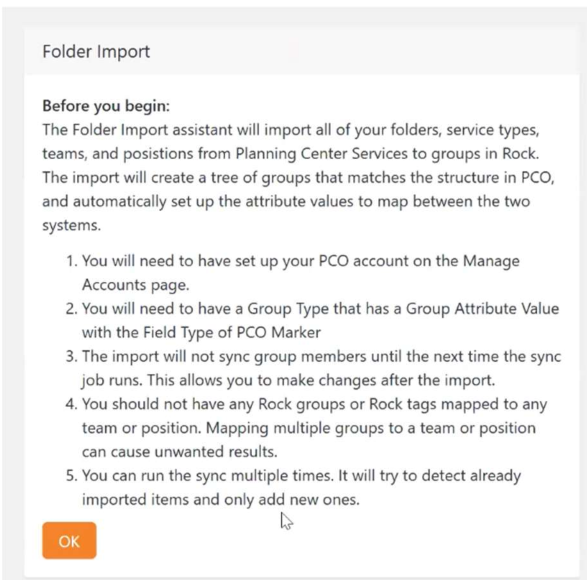
• Job Configuration Assistant: This allows you to manage the System Job easily.
  a. Set up your notification group to be notified if the job has any issues.
  b. Configure Job validation settings:

    • **Continue job no matter how many records change**

    •**Pause job for approval if too many records change**: You can set the percentage so that the job will stop if more than 10% (or your set threshold) of the records are being modified in the sync, it will stop and send a notification the Notification Group, waiting for approval.



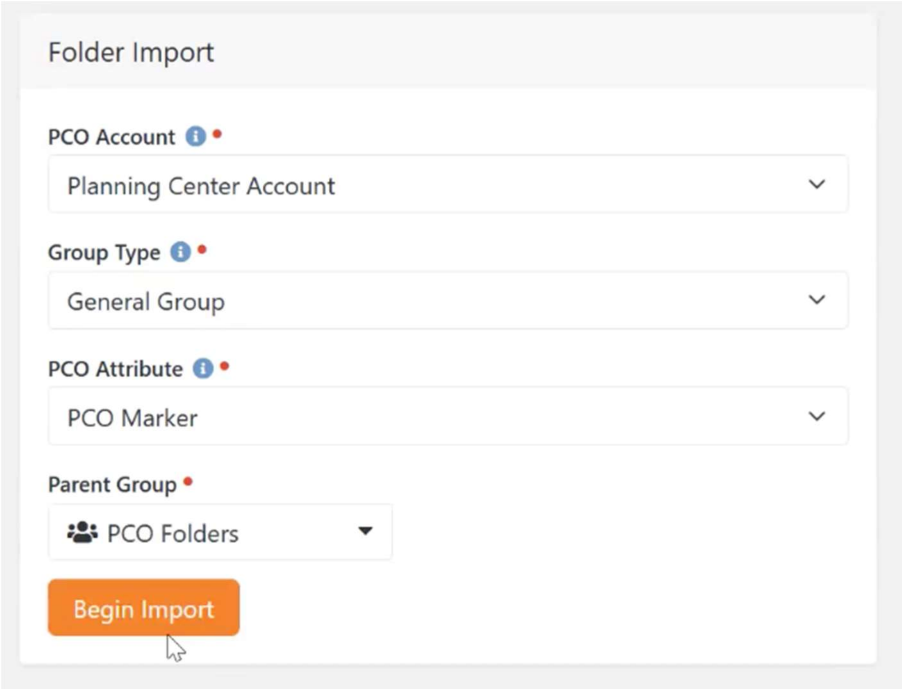
• **Folder Import**: Now it's time to start importing all your Services folders from PCO into Rock. In PCO, people are connected to tags, team leaders, and positions. Detailed Instructions are listed in the pop- up box.



1. In Rock, add a **Group Attribute** to the **Group Type** you'll be using to import your groups. The **Field Type** of this attribute will be **PCO Marker**.

2. If needed add a parent group on the Group Viewer page.

3. Connect the Folder Import to your PCO folder group.



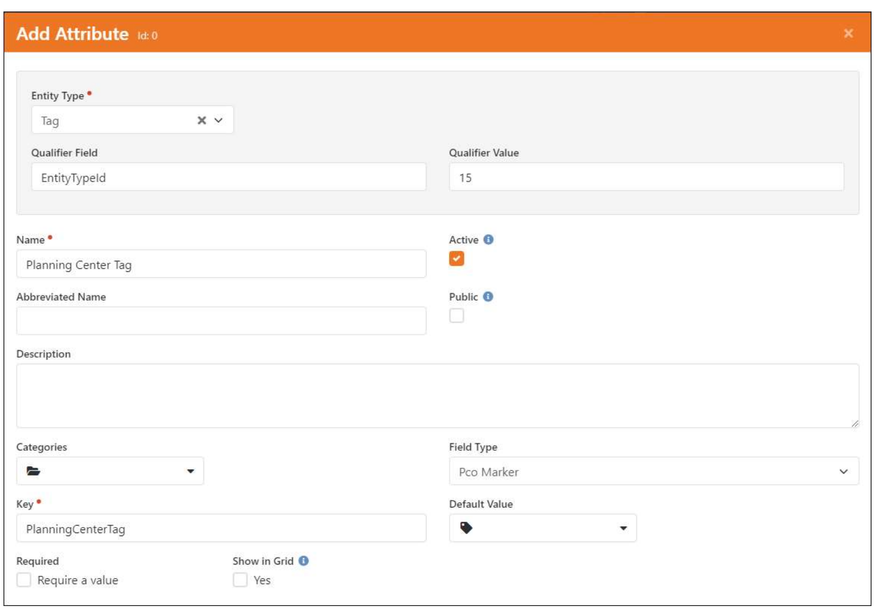
4. After you import, you'll be prompted to review your groups. You'll see the folder structure in Group Viewer. Each group will have the PCO Marker. The next time the sync job runs, the group members will come over.

Tags

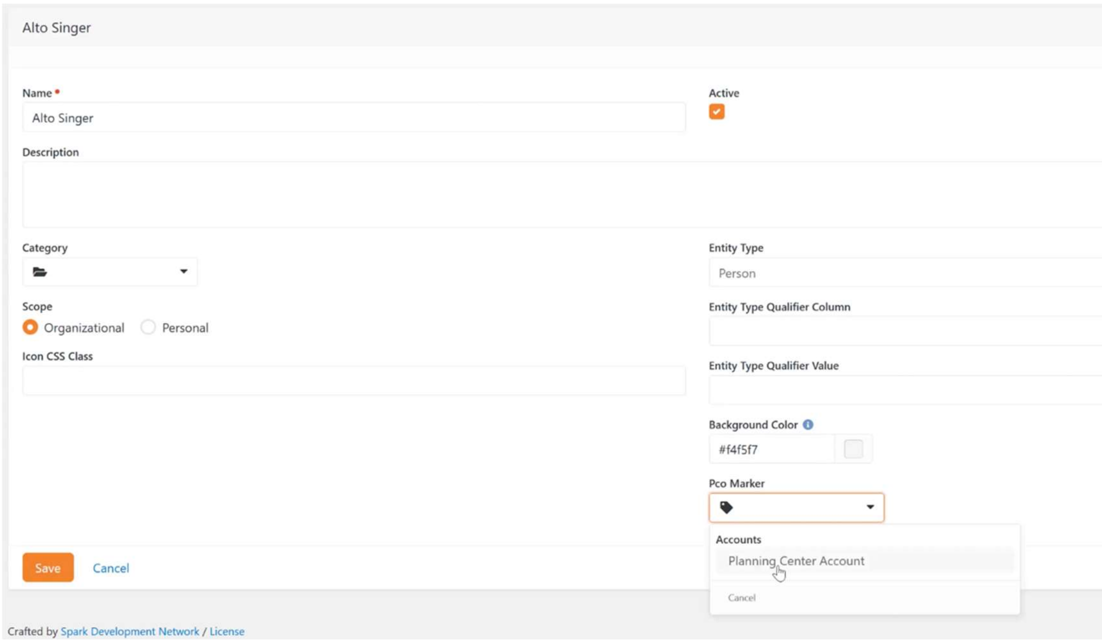
Set up Rock tags for use on the person profile.

1. Navigate to **System Settings** > **Entity Attributes**.

2. Filter for **Entity type** of **Tag**. Add an attribute value in the **Attribute List**. The attribute should have an entity type of **Tag**, a Qualifier Field of **EntityTypeId**, and Qualifier Value of **15** (person tags). The new attribute should have a field type of **PCO Marker**. This gives all person tags a PCO Marker.



3. Now add a tag on the person profile, then convert it into an Organizational tag. Go into the tag and set the PCO Marker on the tag by choosing **Planning Center Account** > **Tags**. This will sync with your tags in PCO.



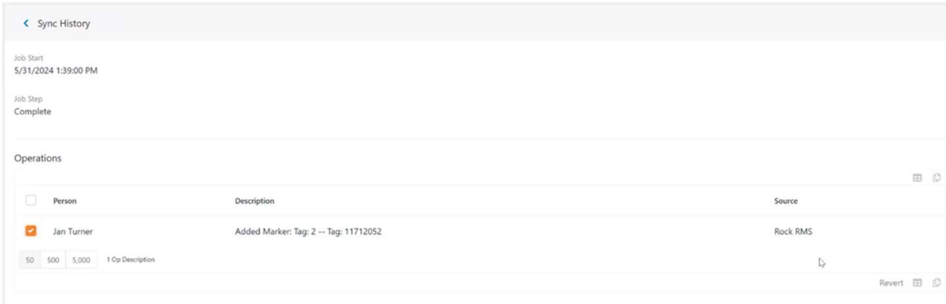
Note: A warning will pop up if you try changing an existing tag already synced with PCO.

Synced Persons

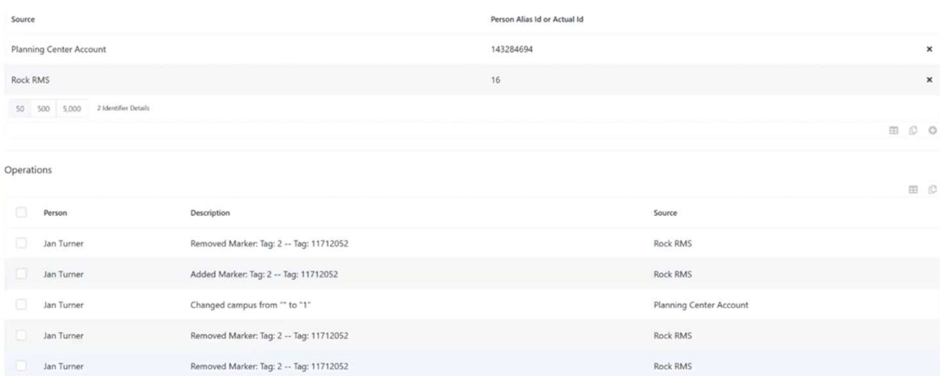
You can check the Sync History from the PCO dashboard options. Navigate to **Admin Tools** > **Installed Plugins** > **PCO v2**. This is where you can view the **Sync History** and **Synced Persons**.

1. **Review Sync History**: When you click into the job detail in **Sync History**, you will be able to see which people records were created, information updated, and what the source of the information is. If you click into a person on the list, you will be able to see even more details like what information was applied to that person's record.

2. **Revert Synced Process**: From the **Sync History**, you can choose to revert a sync if you didn't like what happened. This action will create a new sync that reverses the operation it just did. The reverted change will stay reverted.



3. **Review Synced People**: With the Sync History, you can review the process job by job. In the Synced People area, you can review all the people who are being synced. You can click into each person and see all the actions being done on that person's record during the sync. You can revert a process from this section too by clicking on which synced item you want to revert on that person’s record.



From here, you can also see a person's record ID from PCO or Rock. You can break those records apart by removing one of the source IDs and replacing it. If you want to change the person ID that is coming in from PCO, you will delete the person's Planning Center ID listed and add a new Planning Center Source with a different person ID number. This is helpful if an incorrect record from Rock or Planning Center is being synced.