PLANNING CENTER ONLINE (PCO) SYNC

Version 1.0

MINE CART STUDIO

Introduction

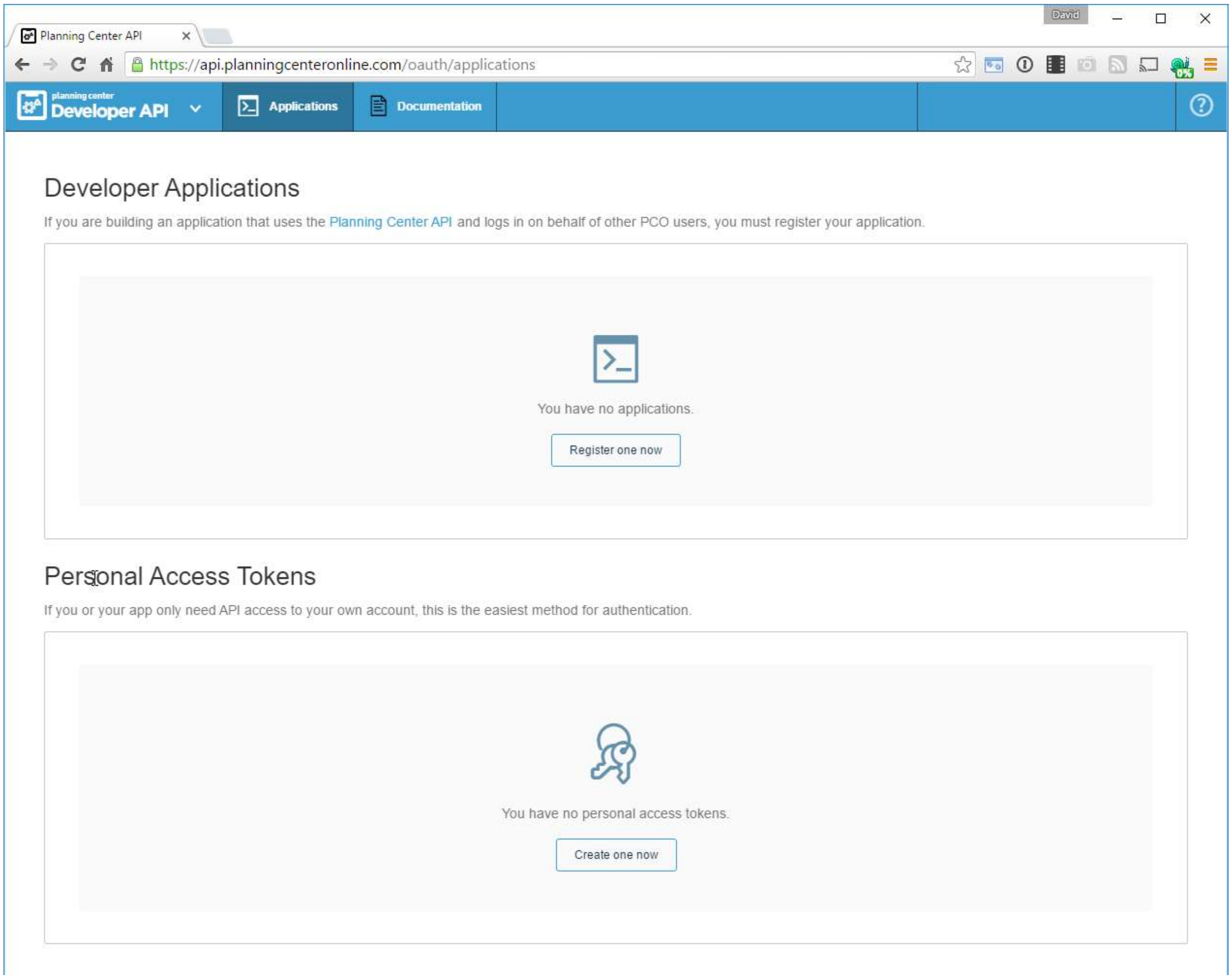
Planning Center Online (PCO) is a service that helps to manage teams of volunteer and especially the scheduling of those volunteers for specific weekend services. These volunteers are usually the same people that you have in Rock. So why should you have to re-enter all their information in PCO when you already have it in Rock? And what do you do when your volunteers update their information in PCO, but forget to let you know? The PCO Sync solves these problems for you. It will automatically add, update, and archive users in PCO based on the group(s) in Rock that they belong to. And if a volunteer updates their information in PCO, that updated information will automatically be synced back to Rock (and vice-versa). This allows both systems to have the most up-to-date information about your volunteers as possible.

Setup

Once you have installed the plugin from the Rock Shop, you will need to tell Rock what PCO accounts you have, and decide what groups in Rock you want to sync. Before doing that though, you need to get some things from PCO.

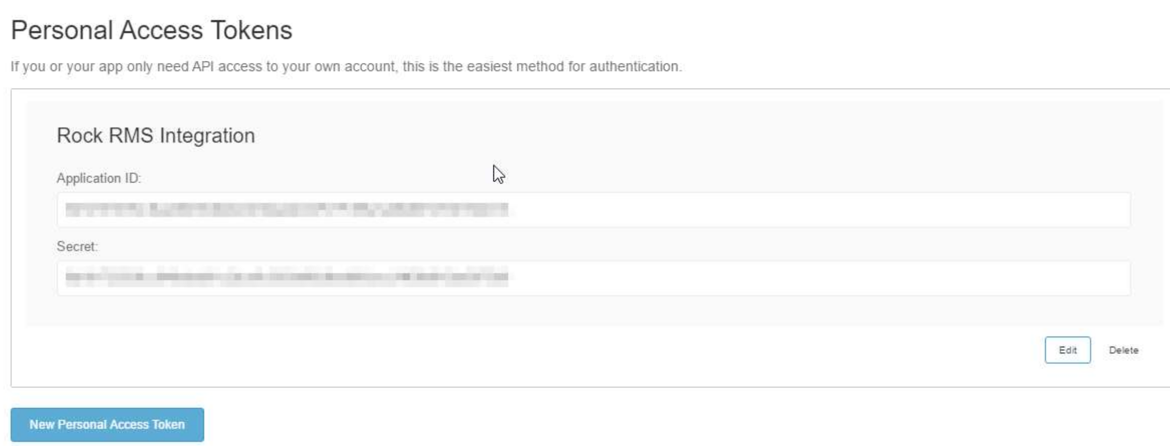
Personal Access Tokens

The first thing you need to do is create a Personal Access Token for your Planning Center Account. You do this from Planning Center Online. Visit https://api.planningcenteronline.com/oauth/applications to create a token.



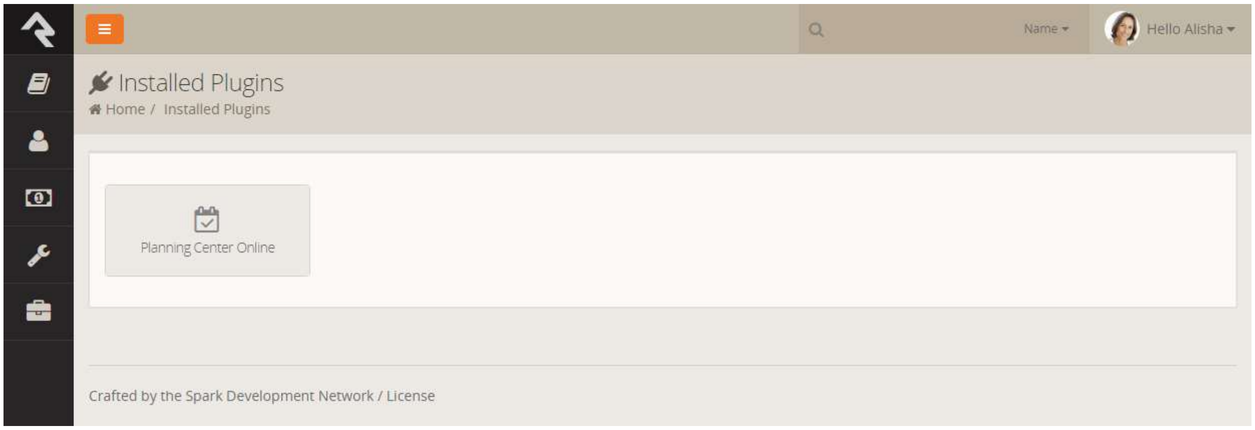
Under *Personal Access Tokens*, click the *Create one now* button. When prompted for the description of this token, enter 'Rock RMS Integration'.

You should now see an Application ID and Secret. You will need these values in the next step.

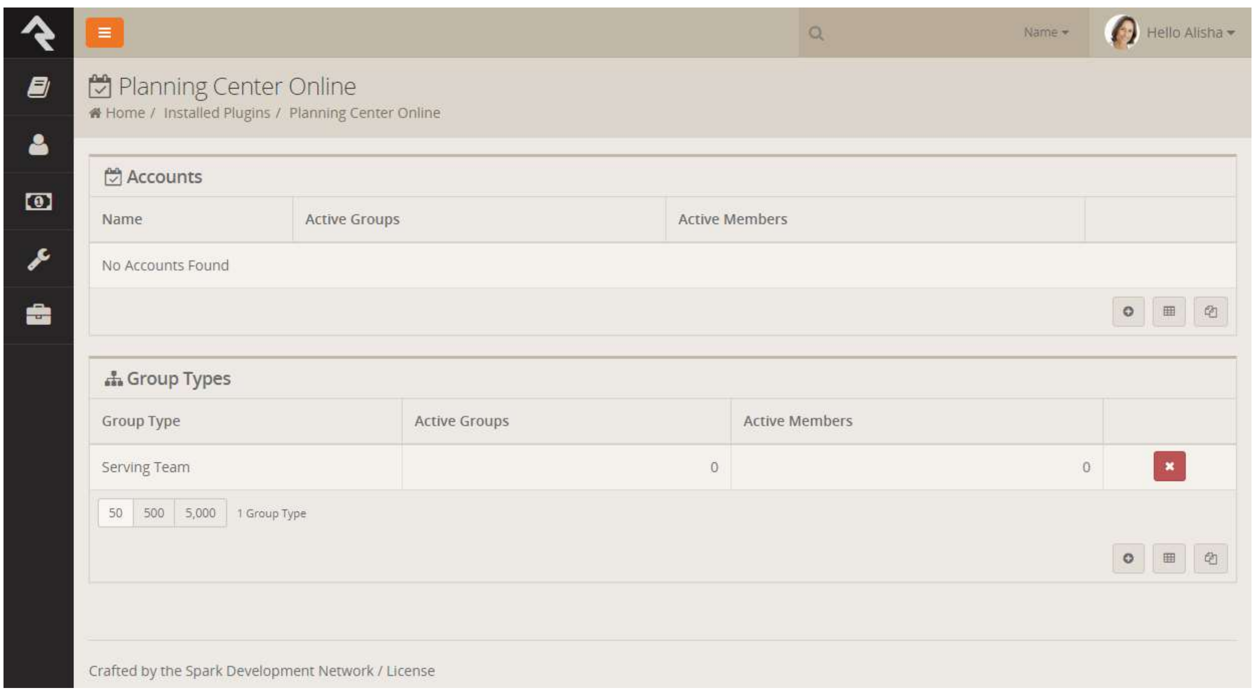


Add PCO Account(s) to Rock

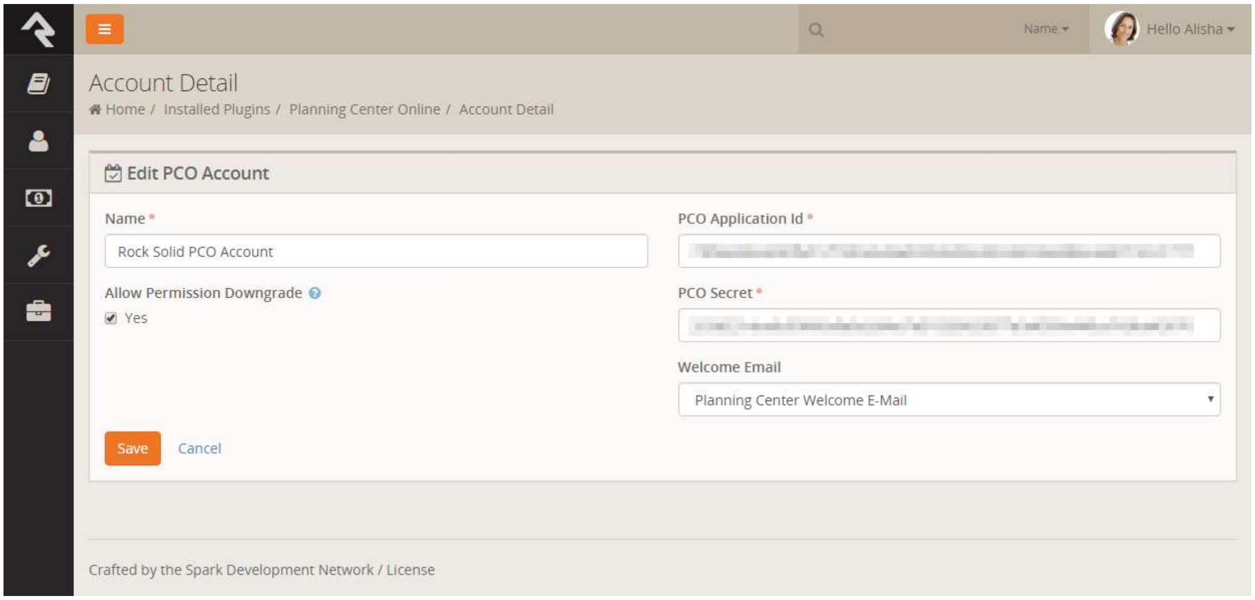
Now that you have your Application ID and Secret from PCO, switch back to Rock and navigate to the new “Planning Center Online” page under *Admin Tools* > *Installed Plugins*.



This page is used to configure the PCO account(s) that you will be syncing with, and the type of groups that should be allowed to sync with PCO.



Click the Add button at bottom of the Accounts grid, and enter your Application ID and Secret that you got from PCO when generating the new personal access token.



Once you have entered the Application Id and Secret, then select the Welcome Email from the list of email templates configured in your PCO account. Most of the time this will be the "Planning Center Welcom E-Mail". Whatever email you select here will be sent by PCO whenever a new person is added to PCO through the sync.

Make sure to also enter a descriptive name for the account, and we recommended checking the 'Allow Permission Downgrade' option. If you have multiple PCO accounts that you are going to sync with, follow these steps for each account.

Note about permissions: The sync will always increase a person's permission level in PCO to the highest level they are allowed based on the group's they belong to in Rock. If the 'Allow Permission Downgrade' option is selected, the sync will also decrease permissions (or even archive people) based on the groups they belong to (or no longer belong to) in Rock. If you don't want permissions to be decreased (or people archived), you can unselect the 'Allow Permission Downgrade' option.

CONFIGURE GROUP TYPES

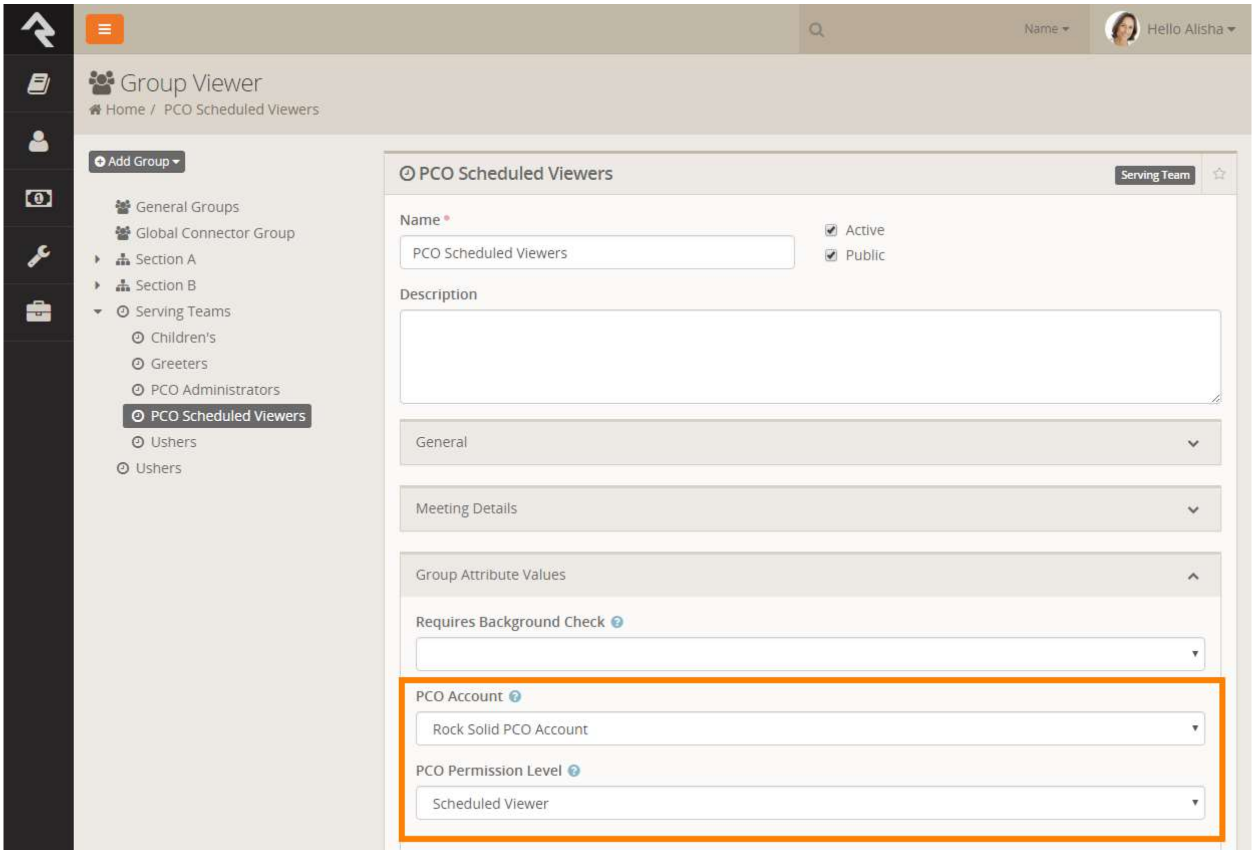
Once you've added the account(s) it's time to decide which group types you want to allow to sync to PCO. The 'Serving Teams' group type was added by the plugin install, but you can add any other group types as well. Just click the add button at the bottom of the Group Types grid and pick your group type. Keep in mind, all that you are doing by adding group types to this list, is making it possible for specific groups of these types to sync to PCO. You will still need to edit each group to enable and configure it's syncing to PCO.

SYNC JOB

A new 'PCO Sync' job was added by the plugin to do the actual syncing of each person's Rock and PCO demographic information. By default, it will run every two hours (we recommend not running it any more often than this, as it may take a fair amount of time to download and compare each user that is being synced). If you'd like to run it less often, you can configure the job from *Admin Tools > System Settings > Jobs Administration* and selecting the PCO Sync job.

USAGE

Now that everything is configured, let's look at how to make it work. To configure a group in Rock so that it's members are synced to PCO, add or edit a group. There should now be two new group attributes on the group detail page for PCO Account, and PCO Permission Level.



If you don't see these attributes, make sure the group's Group Type is one of the ones you added during the configuration to support PCO syncing and that you've added at least one PCO account (see the Setup section above).

Select the PCO account that you would like to sync members of this group to, and the permission level that you would like them to have in PCO (note: if a person in this group belongs to another group with a higher permission level, they will get synced to PCO with the higher level).

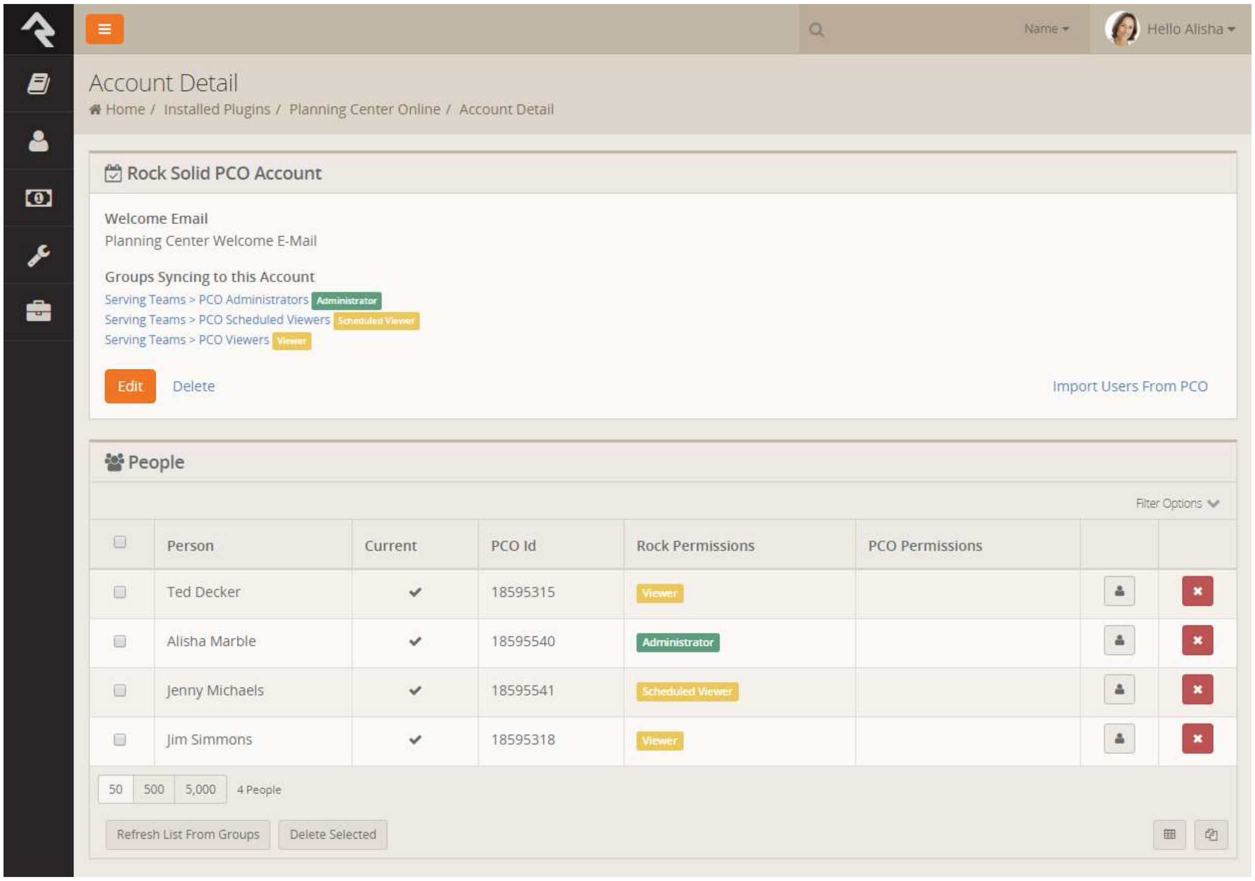
Once you've updated and saved these values, each member in this group will get synced to PCO the next time the PCO Sync job runs. Before adding a new person to PCO, the sync will first check to see if there is already someone with the same email address. If there is (and there is not already another Rock person syncing to that person in PCO), the sync, will update that person instead of creating a new person in PCO.

The demographic information that will be synced between Rock and PCO includes name, birthdate, home address, email address, home, business and cell phone numbers. Each person's photo and permission level will also be synced one-way from Rock to PCO.

You can configure as many groups as you would like to sync to PCO

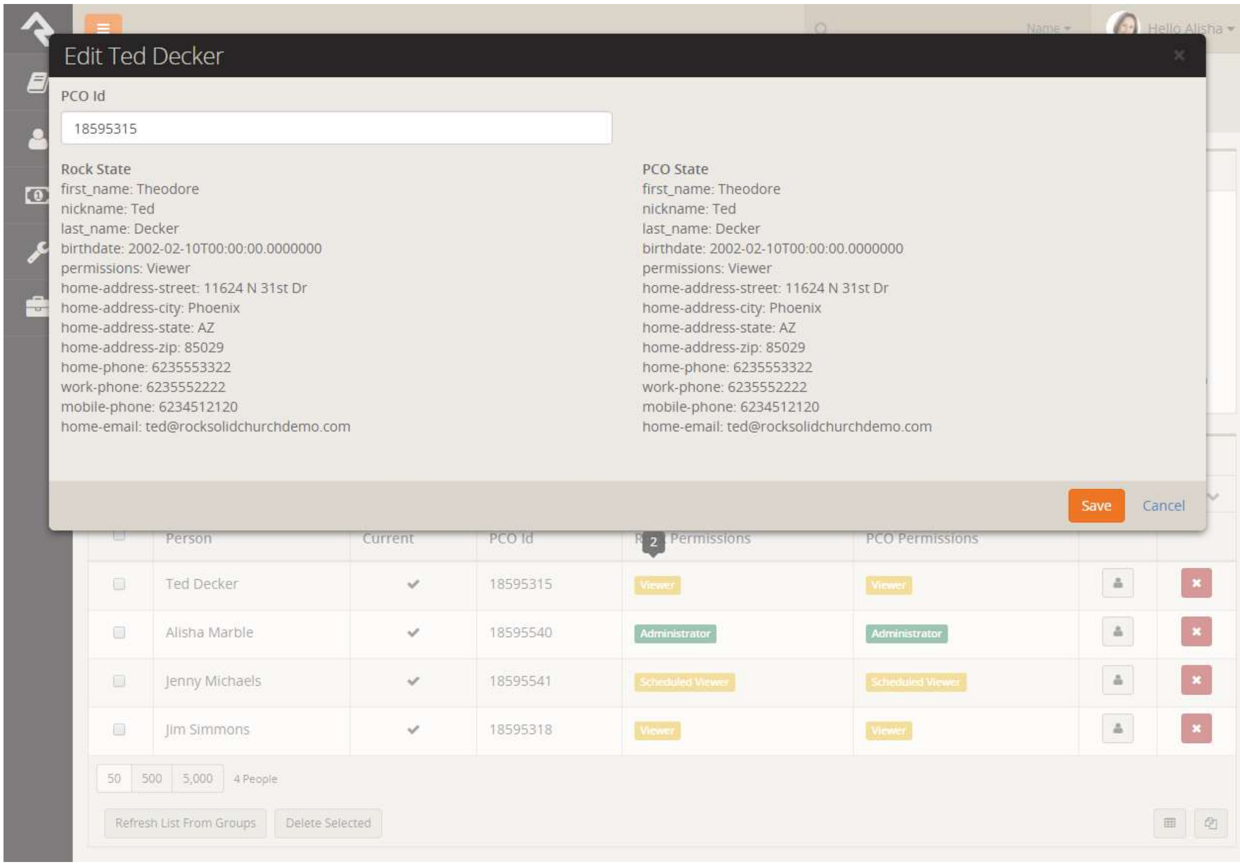
MONITORING STATUS

Once you've configured one or more groups to sync to PCO, and the job has run to sync them, you can see the status of which groups/people are currently being synced from the Account Detail page. Navigate to *Admin Tools > Installed Plugins > Planning Center Online* and select the account you'd like to view.



The account details section lists all of the groups that are currently syncing to the selected PCO account and shows their permission level.

The People list will show all the people in Rock that have been synced to PCO along with the PCO Id that was added and/or associated to the person and their current permission level in both Rock and PCO. If for some reason you need to change the PCO id that a person is being synced to, you can click their row in the list to display a dialog that allows you to set their PCO Id.

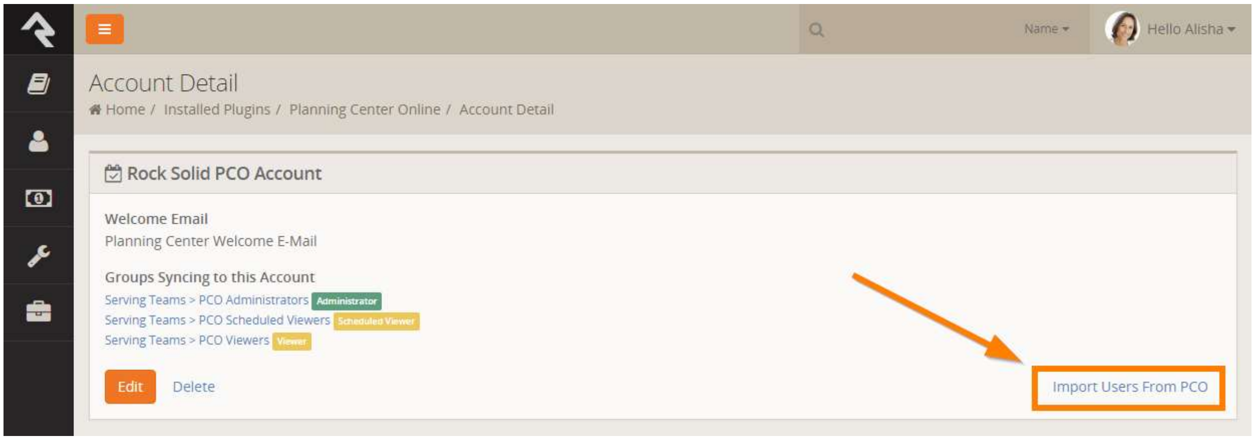


This dialog also displays the current demographic values that were saved by the sync job the last time it ran.

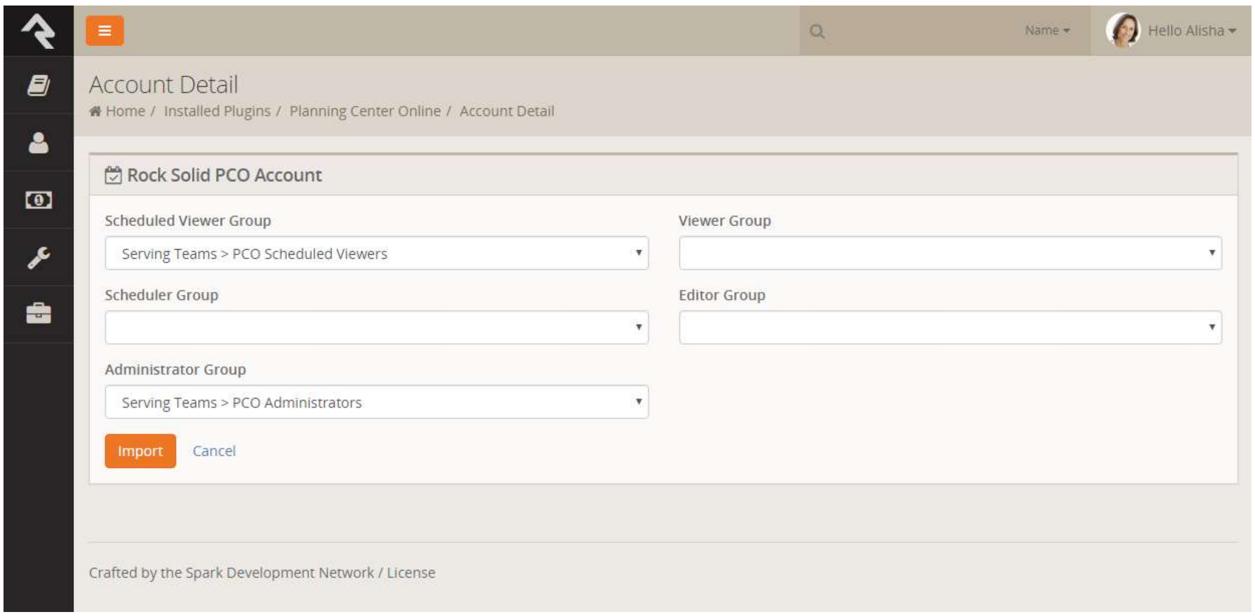
The list of people is updated by the sync job each time It runs, but if new people have been added to Rock groups since the last time the job run, you can click the 'Refresh List From Groups' button to get them added to this list.

Importing PCO Records

The Planning Center sync also allows you to import existing people from PCO into Rock. This is helpful if you already have people in PCO before installing and configuring the Sync. To import them, you will first need to create and configure at least one group for each of the permission levels that you want to import. Once you have configured the groups, navigate to the *Admin Tools > Installed Plugins > Planning Center Online* and select the account you'd like to import records from, and click the "Import Users from PCO" link.



This will display a dialog that lets you select the groups that you would like to import PCO users into.



Once you have selected a group for each permission level that you would like to import, click the Import button. The plugin will then query your PCO account for any people that have not already been configured to sync with PCO and will add them to the selected group based on their PCO permission level. For each person that it imports, it will try to find an existing Rock person with the same email, first name and last name. If it finds a matching person, it will sync to that person, otherwise it will add a new person to Rock.

DELETING PCO RECORDS

When people are removed from groups that are syncing with PCO, the sync will automatically archive that person in PCO. Because of this, you typically do not need to worry about deleting records in PCO. However, if for some reason you would like to delete PCO records (i.e. a duplicate record got created), you do have that option. From the person list on the Account Detail page, you can click the delete button on any row, or even select multiple rows and click the “Delete Selected” button at the bottom of the grid. Doing this will delete the synced record in PCO (from both the Services and People apps). Keep in mind that if this person is still active in one of the synced groups in Rock, the next time the sync job runs, the person will be added back to PCO.