Using the MortarStone/Planning Center Online (PCO) Two-Way Integration

The MortarStone–Planning Center Online (PCO) two-way integration provides churches with a seamless way to synchronize giving and household data between their church management system (CHMS) and PCO. By setting up a dedicated custom tab in PCO, users can view, filter, and segment MortarStone giving data directly within PCO's People module, enabling deeper insights and more targeted ministry engagement. This document outlines how the integration works, step-by-step setup instructions, and practical use cases.

Integration Overview

- **Purpose**: Sync MortarStone household giving data into Planning Center's People module.
- **Core Feature**: Creates a *MortarStone custom tab* in PCO containing giving bands, giving counts, and total giving.
- **Sync Type**: Automatic, ongoing, and updates as data changes in MortarStone.
- **Entity Alignment**: MortarStone tracks by *household*; PCO tracks by *individual*. To maintain accuracy, all data is synced to the **head of household** in PCO.

Setup Process

1. **Access Settings**
    - In MortarStone, navigate to **Settings → CHMS → PCO API Connection**.

    - Confirm the integration connection is active.

2. **Enable Data Push**
    - In the *Push to PCO* section, click the data link to review what fields are available.
    - Follow the provided setup instructions.
3. **Create a Custom Tab in PCO**
    - Use the provided link to open PCO's *Custom Fields* section.
    - Locate the **MortarStone custom tab** on the left-hand panel.
    - Confirm available fields (e.g., Giving Band, Give Count, Total Given).
4. **Set Permissions**
    - In the *Collaborators* section, assign which staff can view the MortarStone data.
    - Save changes.
5. **Complete Sync Setup**
    - Return to MortarStone and check the confirmation box to finalize setup.
    - If the tab does not appear immediately, refresh the page.
    - Click **OK** to begin the initial sync (this process may take several minutes).
6. **Verify Initial Sync**
    - Once complete, MortarStone will display "Last Sync" status.
    - Syncing can be stopped at any time if necessary.

Using MortarStone Data in Planning Center

Viewing Individual Records

- Go to **People → Select a Person**.
- Under **Custom Tabs**, open the *MortarStone* tab.
- Review giving-related fields including:
  - Giving Band
  - Gift Count
  - Total Given

Creating Lists in PCO with MortarStone Data

- Navigate to **Lists → Add Rule → Select Condition**.
- Choose **MortarStone Custom Tabs**.
- Build filters (e.g., Giving Band = 1–5).
- Save the list; results should align with corresponding MortarStone lists.

Example Use Cases

- **Identify New Givers**: Filter by Giving Count = 1.
- **Segment High-Capacity Givers**: Filter by Giving Band (e.g., 3–5).
- **Recreate MortarStone Lists**: Match existing MortarStone reports for comparison in PCO.
- **Age & Giving Segmentation**: Combine MortarStone data with PCO attributes (e.g., 90+ year-olds with Giving Band 1–3).

Ongoing Sync and Automation

- MortarStone automatically updates PCO records when giving data changes (e.g., band shifts).
- Any new lists, triggers, or searches created in MortarStone are automatically pushed into PCO.
- Sync may take longer for large lists, but will update without manual intervention.

Key Considerations

- **Data Level**: All giving data is attached to the *head of household* in PCO.
- **Refresh Cycle**: Initial sync may take longer; subsequent updates are near real-time.
- **Permissions**: Carefully configure collaborator access to protect sensitive donor information.
- **Consistency Check**: Verify MortarStone and PCO lists periodically to ensure alignment.

Conclusion

The MortarStone–PCO two-way integration simplifies donor data management by embedding giving insights directly within Planning Center. With proper setup, churches can leverage synchronized lists and household giving data to drive better engagement, discipleship, and generosity strategies—all without duplicate data entry or manual reporting.