

## Planning Center Integration Instructions

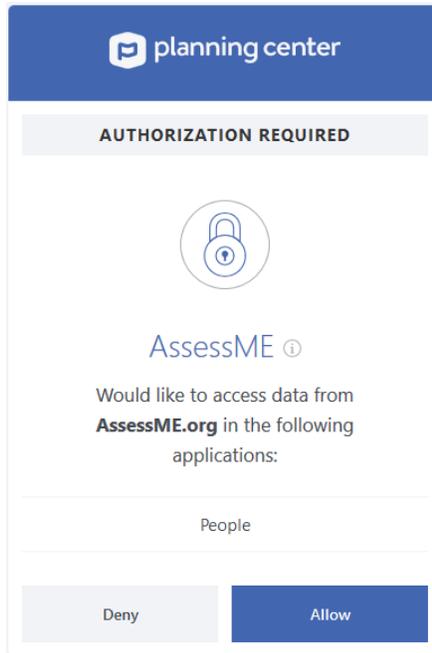
AssessME.org provides automatic integration with *Planning Center*, a leading web-based church management service. What follows are set up instructions to enable your AssessME.org ministry account to integrate with your ministry's *Planning Center* account.

**NOTE:** *Setting up integration requires an administrator account on both AssessME and Planning Center.*

### Authenticate Planning Center Integration Within AssessME.org

 **PLANNING CENTER**  
Allows access to each user's profile directly from your Planning Center portal.  
[Read PlanningCenter Integration Help](#)  
 **Enabled**  
 Allow AssessME to create new users in Planning Center  
[Authorize](#) [Validate](#) [Synchronize Users](#) [Sync Log](#)

1. Sign in to your ministry's AssessME.org administration account, navigate to the Mobilization Dashboard, then locate and click *Integrations*.
2. On the Integrations page, under Planning Center, select the *Enabled* checkbox.
3. Optionally, select the *Allow AssessME to create new users in Planning Center* checkbox to allow AssessME to create users in your Planning Center account if a user cannot be matched to an existing user.
4. Click the *Authorize* button. If prompted, sign in to Planning Center.
5. Click *Allow* to authorize AssessME.org to access data in the People application. Once complete, this process creates a new custom tab and AssessME fields in the Planning Center People application.



6. Click the *Validate* button *once* to ensure all settings are correct. The validation process creates a new custom tab and AssessME fields in the Planning Center People Module.
7. Select the *Synchronize Users* button to initiate your first linking of AssessME.org users with Planning Center individuals. Note: this may take several minutes or more depending on the number of users associated with your ministry.

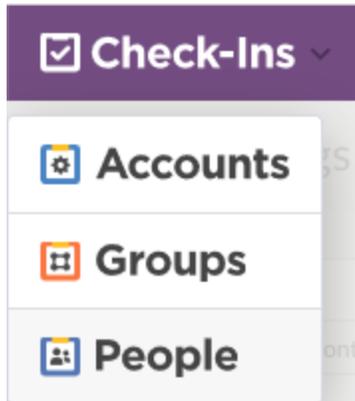
### ***A Note about Linking***

*Linking Planning Center individuals to AssessME users is automatic. Under normal circumstances, you do not need to manually initiate linking with the Synchronize Users button. While AssessME makes every effort to match users with individuals in Planning Center, there may be circumstances where matching users is not possible.*

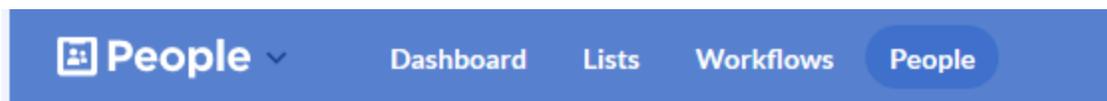
## Viewing Candidate Profiles in Planning Center

To view AssessME.org candidate profiles within Planning Center:

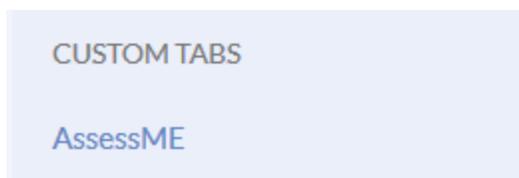
1. After signing into your planning center account, select the People module from the top-left menu.



2. Select the People menu at the top.



3. After choosing a specific person, you will see the AssessME custom tab on the left hand menu.



4. If the user has taken assessments with AssessME, the results will show when selecting this tab. In addition a link to the user's full assessment profile exists.

## AssessME

ePersonality  
Analyzer

graceGifts  
Administration, Exhortation, Leadership

LeadershipStyle  
Strategic

Skills  
Underwater Basketweaving

Profile  
<https://www.assessme.org/cp62120>

5. Clicking on the Profile link will show a report page similar to the one below.

 Print ^

### Candidate Profile - Alex Ryan

6 November 2019

[Contact Information](#) | [ePersonality](#) | [graceGifts](#) | [Leadership Style](#) | [Interests](#)

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**Contact Information**

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1569 W. Grant Street  
Hopewell, VA 23860  
United States of America

111-111-1111  
alex.ryan@example.com

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 ePersonality

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Analyzer

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 grace  
GIFTS

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