# PART 1: Church Community Builder Integration Instructions

AssessME provides automatic integration with *Church Community Builder* (CCB), a leading web-based church management software. What follows are one-time set up instructions to enable your AssessME ministry account to integrate with your ministry's *Church Community Builder* account.

IMPORTANT: *Before beginning these steps, sign into your ministry's Church Community Builder administrative account. Next, open a new browser tab and log into your ministry's AssessME mobilization dashboard. Both software systems should be open simultaneously in separate internet browser tabs. Both software systems must be operating in Administrative mode.*

1. **Setup a Custom Field in Church Community Builder**

   a. Locate and select the gear icon ⚙ (i.e. System Settings) to the far right and top of the Church Community Builder Administration interface.

   b. Select the sub-menu item ☐ **Customizable Fields**.

   c. Under the subheader: "Other Custom Label Fields", select: "**Add another text field**".
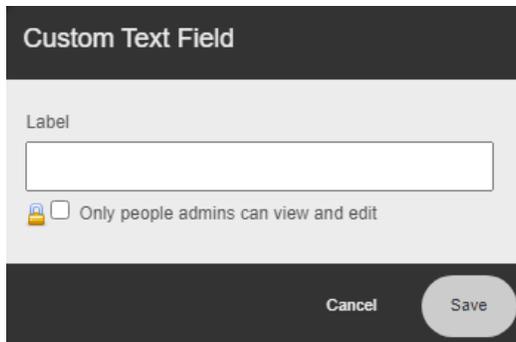
   d. Type "**AssessME**" within the Label field (NOTE: Use exact spelling and case).

   e. Place a check in the checkbox entitled: "**Only people admins can view and edit"**; the checkbox is located immediately below the custom label field.

   f. Select "Save".

2. **Create an API user in CCB**

   a. Locate and select the gear icon ⚙ (i.e. System Settings) to the far right and top of the Church Community Builder Administration interface.

   b. Select the sub-menu item: 🔧 **API**.

c. Highlight and copy to your computer's clipboard, the address displayed in **Your API URL** field. (Ctrl+C, or right-click on the highlighted field and select "Copy"). You will need this address in step 3.

d. Select the gray button below the "Actions" sub-header entitled: **Add a new API User**.
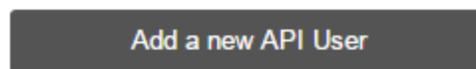
e. The **API User** form now displays. Enter the information into the form as displayed in the graphic on page 3.

You must now create a unique password that will be entered here, within this form, as well as entered within your AssessME ministry account when completing this integration setup. Do not use personal passwords. Write down this password and retain it in a safe place for use in a later stage of this setup process.
Note: *Do not click the Save button yet.*

f. Select the **Services** tab within the blue header of this form, and then select the following services from among the service listings. (NOTE: Do not check the "Select All" checkbox.)
- ❏ ability_insert
- ❏ ability_list
- ❏ create_individual
- ❏ custom_field_labels
- ❏ gift_insert
- ❏ gift_list
- ❏ individual_profile_from_id
- ❏ individual_search
- ❏ passion_insert
- ❏ passion_list
- ❏ style_insert
- ❏ style_list
- ❏ update_individual
- ❏ update_individual_fit

g. When completed, select **Save** to complete the **API User** configuration.

PART 2: Set Up CCB Integration Within AssessME

STEP 1: Log into your ministry's AssessME administration account, locate the **My Account** quadrant on the main page, then locate and select **Integrations**.

STEP 2: The Church Community Builder configuration page will display. Select the **Enabled** checkbox**.** Optionally, check the **Allow AssessME to create new users in CCB** checkbox.
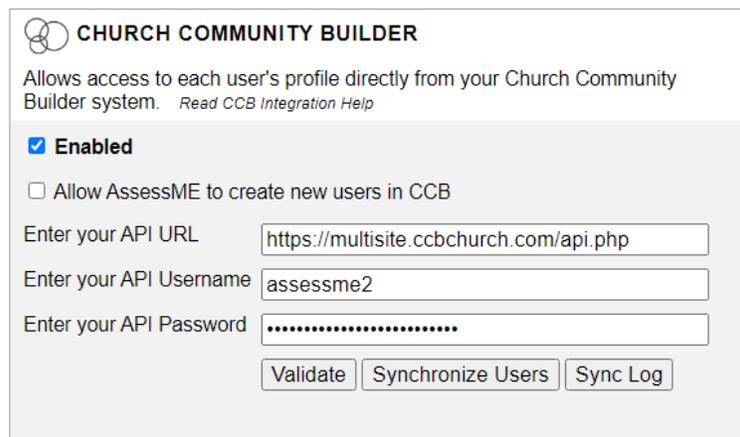
STEP 3: Then locate the API URL identified in **STEP 2, sub-section c** (pg. 2) of the *Church Community Builder* setup instructions, and copy/paste the URL into the **Enter your API URL** field.

STEP 4: Enter your API Username found on **STEP 2, sub-section e** (pg. 3) of the *Church Community Builder* API setup instructions. The user name should read: **assessme**.

STEP 5: Enter your API Password found on **STEP 2, sub-section e** (pg. 3) of the *Church Community Builder* API setup instructions.

STEP 6: Select the **Validate** button to ensure all settings are correct.

STEP 7: Select the **Synchronize Users** button to initiate your first linking of AssessME users with *Church Community Builder* individuals. This may take several minutes or more depending on the number of users in the system.


A Note about Linking

Linking CCB 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 CCB, there may be circumstances where matching users is not possible.*

Viewing Candidate Profiles in Church Community Builder

To view AssessME candidate profiles within *Church Community Builder:*

STEP 1: Open your browser, go to *assessme.org/login*, and sign into your ministry account. If you do not complete this step now, you will be asked to login when trying to view candidate profiles within *Church Community Builder*.

STEP 2: Select "People" from the sidebar menu, then initiate a search for the desired person.
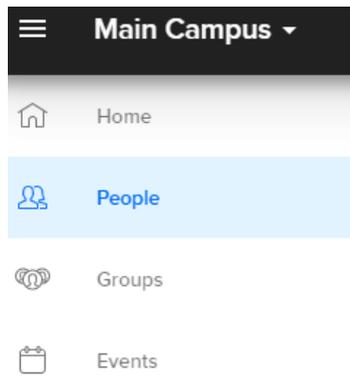
STEP 3: On the **ABOUT** tab of the selected person's page, scroll to the **Custom Fields** section and click the **View Profile** link next to the **AssessME** label.

A report page similar to the one below will open….