Planning Center Integration Documentation for Rallee

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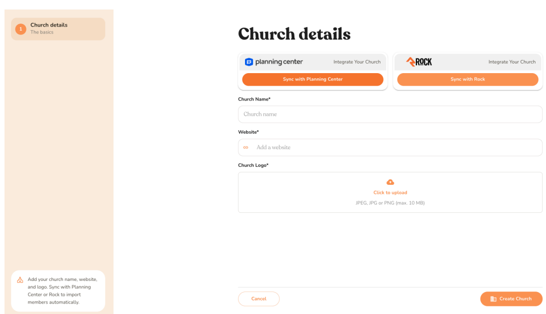
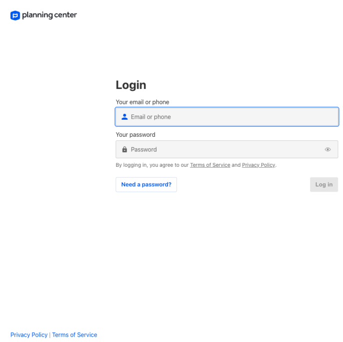
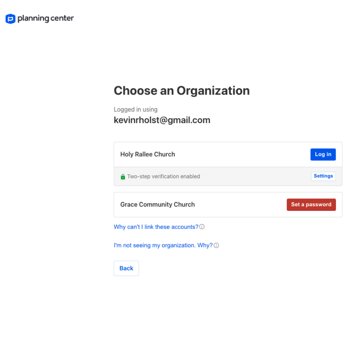
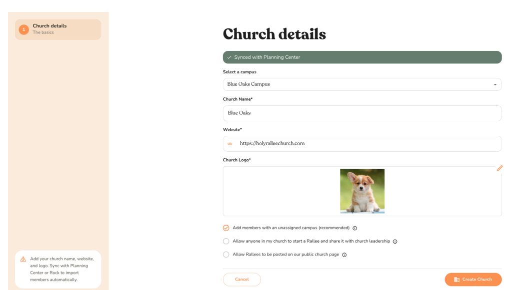
How to get started with Planning Center

1. The person handling the sync needs to be a Manager or Admin in your Planning Center account.
    a. Click the Sync with Planning Center button when signing up or in the Settings page of your dashboard.
    b. Follow the prompts from Planning Center to login and select your church.









2. Select your campus
3. We recommend keeping the “Add members with an unassigned campus” checked. This enables you to add people from Planning Center who are not assigned to a campus in Planning Center.
4. That’s all we need from you to get started! Sign up at https://rallee.com/church/create

How the integration works

1. Who gets added into Rallee from Planning Center?
    a. Our database retrieves all active members in Planning Center for the campus you chose.

   b. Our database also retrieves all groups labeled “Active”. Groups is not on by default. You can enable it (also free).
   c. We do not automatically invite anyone from Planning Center to Rallee via email or otherwise. You are in control of who you invite to your church dashboard and how you share your public page.
   d. If the user already has a Rallee account, they may see that your church is in Rallee if their email is associated with an email in Planning Center if you enable this feature. This is off by default, but you can enable this in settings. This is how your church will show up for your congregation.
2. The integration retrieves data from your Planning Center database at a rate of ~1 minute per 10,000 records, so it should be ready by the time you are done with the sign up process depending on the number of records in your database.

How we handle duplicates

3. Our sync starts with the users with the lowest value Person ID. This helps ensure accurate data in the event there are multiple users with the same email. If a user is a duplicate in Planning Center with the same email address as their duplicate, Rallee will use the first and last name of the lowest Person ID in the Planning Center system as the name of the user. User’s group data will be aggregated in Rallee if there are multiple users with the same email.
4. If an Admin tries to add a user in Rallee with an email address that is already in Planning Center/Rallee, then they will get a merge request for that user in Rallee. Nothing will change for duplicates in Planning Center and we will not update Planning Center with this duplicate user structure.

What data do we access from Planning Center

1. User first name
2. User last name
3. Person ID
4. Email
5. Groups
6. Users in groups
7. Group details

What data do we reveal to members of the church

1. Regular members of your church cannot see any data from Planning Center for themselves or anyone else. We do not pass information from Planning Center to regular users.

2. Admin, Staff, and Volunteer roles (more information on role types here) are assigned by an Admin or Staff in your church Rallee dashboard. These users have varying levels of permission to add notes, view care notes, update settings.
3. Rallee is an opt-in platform. That means only users who choose to join Rallee with the same email they have in Planning Center can have their profile connected to your church. Users can disconnect your church from their profile if they choose to do so.
4. We do not reveal the user's email address to other church members unless the user opts in to share their email in certain circumstances (ex: contact information for their Rallee, or form responses that go to church/group leadership).

How you will invite users from Planning Center to Rallee

1. Rallee does not automatically invite Planning Center users to Rallee. We leave this up to you and you can share about Rallee with all of our pre-made design assets with your custom URL already embedded. Here is a video exploring the design assets page.
2. Groups (if enabled. optional)
   a. You will see all of your groups in Rallee that are listed in Planning Center. You will be able to choose which groups to invite. Their members and leaders will get an email to join their group in Planning Center.

How do users share a care page (Rallee) with church leaders?

- Users in your church can share Rallees with church leadership easily by clicking a button during the start a Rallee sign up flow. Here is a video on how they do this. This feature is off by default, but you can turn it on at any point in Settings. When this is toggled OFF, then only Admins, Staff and Volunteers can share Rallees that they create with church leadership.

How we send data back to Planning Center

- Our core principle for this sync is that Planning Center is your source of truth. Rallee only adds to existing accounts in Planning Center. We never add new people or new groups into your Planning Center database.
- Admins, Staff, Volunteers, or Members in Rallee have no access to edit records in Planning Center.
- We send data back to Planning Center every minute
  - We add a note into the profile of the individual that was given care or cared for someone else. This includes:
    - Note that the user wrote an update in a Rallee
    - Note that the user wrote a message in a Rallee
    - Meals, errands, check-ins, etc given in a Rallee
    - Care notes written for the individual

    - Follow ups made in Rallee for that individual
- All notes that we share back into Planning Center are accessible to view in the Notes page of your Admin Dashboard. Here is a video for what the Notes page looks like.
- We would love to support your database and understand what other data would be beneficial to send back to Planning Center. Please let us know!

Do you access our financial information from Planning Center?

- No. We never will access your financial information from Planning Center. We don't access background check data or any other sensitive information.

Questions?

- Contact Kevin Holst at kevin@rallee.com