Using Planning Center Registrations

URL: https://registrations.planningcenteronline.com/
Login with an email address on your Planning Center profile. If you don't know your password, it will allow you to set one or reset it.

Navigation

- All active events are shown on the home screen
- To filter by campus, click "All Campuses" in the top bar and choose "Rocky Mount" or "Wilson"
- To see old/archived events, click "All Categories" in the top bar and choose "Archived Events"

New Events

- You can create one from scratch and click "New Signup" in the top bar
  - There are 3 kinds of signups for events.
  - **[MOST COMMON] "Detailed" -** for when you want to know about each person who is coming.
  - **"Simple"** - for when you only want to know *how many* are coming. You are assuming the person registering is bringing a group of people and you will only be communicating with that person as the contact.
    - For most of our events, we do want to know "who" and not just "how many".
  - **"None"** - see the notice they give you. We are not using Registrations anymore for events that aren't taking signups. See the documentation for [Using Planning Center Calendar].
  - You can choose to create a Signup without a date attached for ongoing signups.
    - For example, maybe we are collecting signups for a Baptism or Membership Class, but we don't have the next one scheduled yet.
    - Once you have a date established for the event, you can go back and add it
- Or, from an existing event, click "Actions" in the top right of the top bar and click "Duplicate event"
- **As you create the event, it will be "Hidden" to start with. This allows you to get everything set the way you want before it is ready. Once it is done, don't forget to go to "Settings" -> "Visibility on Church Center" and set it to "Published."**

Minimum Requirements for Each Event

Click the "Configuration" tab and set:

- Name of the event
    - Use the same name from the Calendar event. It will be populated for you if you used Calendar to create the Registration sign up using the Connections tab.
- Event Description
    - You can use the same description from the Calendar event. It will be populated for you if you used Calendar to create the Registration sign up using the Connections tab.
- Dates and Times
    - Set the date(s) based on when we are publicizing it. It will be populated for you if you used Calendar to create the Registration sign up using the Connections tab.
- Location
    - For events that only occur at one location, go ahead and set that here. The campuses are already available as options so you can just select "Wilson" or "Rocky Mount" if the event is occuring in the church building.
    - If it is somewhere else, click "Other" and name the location, then enter the address and it will plot it on a map for you.
    - If the event occurs at multiple locations (such as an event that is happening at both campuses), just leave this blank and indicate the location details in the Event Description
- Categories
    - You may set a category if it applies. Since Calendar now drives the Events tab, this is not necessary since people will be filtering based on Calendar categories (tags) and not Registrations.
- Campuses
    - Same as Categories.

Optional Features you can use if desired:

- (Configuration Tab) "Event Details" left tab -> "Visibility on Church Center"
    - You can set the "Visibility" to hidden while you are building out an event and then set it to "Everyone" when you are ready to publish it
- (Configuration Tab) "Event Details" left tab -> "Event Managers"
    - If you would like someone else to be able to have access to the details of the event, the registrations, track payments, etc you can add them here
- (Configuration Tab) "General" left tab -> "Registration Status"
    - If you are collecting registrations, you can set a date where the registrations will close automatically

- (Configuration Tab) “General” left tab -> “Custom Confirmation Email Message”
    - By default, Planning Center will send a generic “You have registered for X event” email
        - If you would like to customize that email with next steps or details for your event, you can add that here
- (Configuration Tab) “General” left tab -> “Notification List”
    - If you would like someone to be notified by email every time someone registers, you can add that email address here as well
- Segmenting Registrations
    - You might need to track people differently. You have several options to do this, with each option in a tab on the left side of the event.
    - (Configuration Tab) “Selection types” left tab
        - By default, you will have one selection type, which defaults to be called “Standard” with a $0 amount. You can change that here.
        - If your event costs something different based on the type of person, set those options here with different amounts
        - If you allow deposits, check “Allow partial payments” in the Cost section in the top right of the Attendee Types screen. This allows for people to make multiple payments over time, which is particularly helpful for camps or other high-cost events.
        - You can also restrict selection type capacities, even if your event doesn’t cost anything. This is helpful when you are managing sign ups and you have a certain number of slots for certain teams or seats in a van, etc.
        - Click on the selection type and you can also see that you can set restrictions on things like age, grade or gender
        - You can also determine which information is optional, required, or not collected at all.
        - If you are offering child care and you need to track how many adults and how many children, you can use two selection types - one for adults and one for children needing childcare.
            - When the child is registered, you will have access to all the information in our system for the child including their age, allergies, etc.
        - Keep in mind there is a fee associated with accepting credit cards, so you will want to build in about 2% of the cost of the event for credit card processing.
            - The benefits of allowing credit cards far outweigh the costs, including reducing the amount of cash we are handling, convenience for people to register themselves on the app or online whenever they want, etc.
            - Do not build an event that has a cost to it and not allow people to pay online.

            - First, the attendee type will say “Free” when in fact it is not Free
            - Second, we would prefer payments to be handled with credit cards and online payments so there is less cash being handled at events, especially events off campus
            - Third, people want the convenience of paying when they register.
        - It is perfectly acceptable to accept online payments AND in person cash/check payments.
    - (Manage Tab) “Add-Ons” left tab
        - If there are optional items someone might be able to purchase, like a t-shirt, a meal, or a book, you can include that in the Add-Ons section and collect payments based on that.
    - Collecting Other Information during the Registration Process
        - You have 3 levels of information you can collect:
        - **Registration Questions** - Information that applies to *everyone on the registration*, no matter how many people are registering.
            - For example, during KidzFest, we ask “How did you find out about KidzFest” as a Registration Question. They only have to answer that once.
            - Or, for Membership Class, you might ask, “Do you have any children that need childcare?” This way the person registering answers that and only once.
        - **Attendee Questions** - Information *specific to each person* on the registration.
            - For example, during KidzFest, we ask “Does this child have any special needs?” as a Registration Question. This is an “Attendee Question” because it might be different for each person registering.
            - You can segment Selection Types so only certain types get certain questions. For our KidzFest example, we do not ask that question for the “Parent” selection type.
        - **Forms** - Information you collect *after the registration is complete*.
            - For example, for youth camp, months after they register, you might need them to fill out information about an emergency contact, or download a form.
            - They do not have to complete these forms to register. So even if you make a form “required”, they will be able to register. They will be flagged later for follow up.
    - (Manage Tab) “Discounts” and “Scholarships” might be useful to you.
        - If so, read about them here: https://pcoregistrations.zendesk.com/hc/en-us/articles/204923080-Discounts-and-Scholarships
- Handling people who have already registered

- (Registrations Tab)
  - This will show all individuals who have registered for the event and whether they have paid their balance (if applicable), whether they have answered the questions required, etc.
  - If you collect sign ups manually on a sheet of paper or take payments in person, you will need to record that here.
  - There are some buttons along the top of this screen you can use to work with the registrations:
    - "Email" - you can send an email to all attendees as a reminder, or just send an email to those who have a balance outstanding or a required form outstanding
    - "Reports" - take a look at the options here if you want to work with the registration data in a spreadsheet or print out a list of attendees you can use at an onsite table
- (Payments Tab)
  - This lists all payments for the event, whether taken in person in cash or online.
  - Use this to keep tabs on how much money is left to collect if you are allowing deposits or in-person payments
- (Assignments Tab)
  - If you want to group attendees for things like rooms, teams, vans, etc after the fact, you can do this year, including auto assignments based on demographic data.
  - If you want to use this feature, contact Jonathan Minter to talk this through

- Check-ins
  - If you would like to track actual attendance or print off name labels, you can integrate Registrations with Check-ins
  - Contact Jonathan Minter to talk this through