H-HC6

User Manual

Prepared by: Administrator
Date: 11/4/2019

H-HC6

Table of Contents

What's new with PlanetReg

01 November 2019

PlanetReg now has two modes of operation, **Basic** mode and **Pro** mode. These modes will be in operation as of December 28, 2019.

For a discussion on these modes see:

Basic vs Pro Mode

Two new features, available when you first log into your account, will allow you to search multiple events for registrants and create extracts/ reports spanning multiple events - see:

Multiple Events: Lookup Attendee and ME Reports

You can now see your Merchant Account information on the My Accounts page. Merchant Account information is only used/ available if you are using anything but the standad Paypal account to collect money - see:

My account settings

Surveys can now be exported as a PDF file for archival storage, printing or general distribution, see:

Survey

There have been several updates to the report builder.

The **Roster Report** has been considerably expanded.
The **Financial Reports** have been expanded to include 4 reports now.
There is a new section where you can create forms for:
- **Registrant Sign In**.
- **Registrant information** (what did I sign up for).
- **Waiver signature form**, so you can have a physical signature on each waiver.

There is a new section where you can create **PDF facsimiles of your main page and questions page**.

See:

Report builder

Ticket stubs can be added to each confirmation via a check on the Extras page in Setup, see:

Event Tickets

You now have the option of adding a processing fee to your registrants total fees. This is avaialble only if you are passing the PlanetReg service fee on to your registrants, see:

Processing Fee

Our current list of supported credit card processing gateways:

```
Authorize.Net
eProcessing Network (ePN)
eWAY
Paypal Payflow Pro
Sage Payment Solutions
USA ePay
SecurePay (USA)
SecurePay (AUS)
GoEmerchant
```

```
Fat Zebra
Paystream
Stripe
BluePay
Merchant One
Elavon - Converge
BlueFin - PayConex
eWay Australia
Payeezy - First Data
CardConnect
MX Merchant
Payment Data Systems
```

11 March 2018

1. You can now set up your event to accept partial payments. The system does not automatically send reminders for subsequent payments, but it is quite simple to send these reminders using the email attendees function.

Partial or timed payments

2. You may set up your event to skip the first page and go directly to the questions page. This option is not available with free registrations. You should think carefully about using this option since it has several side effects - i.e. it automatically registers attendees using the first registration type on the Layout page, the attendee never sees the first page which usually has relevant information regarding an event. This feature, as well as others, is avaialble only for Pro mode events.

Auto Register

3. Our current list of supported gateways for payment processing:

Authorize.Net http://reseller.authorize.net/application/?id=5554250
eProcessing Network (ePN)
eWAY
Paypal Payflow Pro
Paypal Payments Pro
Sage Payment Solutions
USA ePay
Payment Express - PXPay
St.George Bank
Bank of New Zealand
Camtech
SecurePay (USA)
SecurePay (AUS)
GoEmerchant
Fat Zebra
Paystream
Stripe
BluePay
Merchant One
Elavon – Converge

4. For users who operate many events, we have added an Administrative Code which you can use to categorize events. The code will show up in all csv files and can be used to filter events on the 'my events' page.

Administrative Code

5. All help videos are now on YouTube, which does a better job of sizing videos for phones and tablets. The help system itself is now much more phone and tablet friendly.

6. There is a much expanded help section on using the mini-editor.

Using the mini-editor

7. Deleted and archived events may continue to show up in Google or other search engines long after they are over. If someone clicks on the event link they will get an "oops - can't find that event".

8. If you prefer to have a complete copy of the help system locally, you can now download a .pdf file of the help system. This then can be used as a complete user manual for the system. The only difference is that videos must be played via YouTube and you will see a black rectangle where the video used to be and under that a small icon: When you click that icon, the video will be played in a browser window.

The pdf is here:

17 February 2017

1. Standard questions can now be limited to the lead (first) registration.

Standard questions

2. You can now add a service fee to registrants that pay with Paypal or a credit card, or alternatively have a fixed service fee that covers all or some of your processing costs.

Taxes and Fees

3. Sessions now allow for multiple choice of items (check boxes instead of radio buttons).

Sessions

4. On request only, we can condition registration types so that only one can be picked.

5. You can now share survey results with others via a unique URL, shown on the survey results page. This URL exposes the survey results only, without allowing admin access to your event. This is primarily useful for users who do not wish to use Excel to convert the survey results to other formats.

Survey

23 April 2016

1. New Open and Close Date options.

You can now specify more details regarding opening and close dates for your events.

See Open and Close Dates

2. Registrant change and cancel options.

You can now allow registrants to change and/or cancel their own registrations.

See Allow registrant Update and Cancel

3. If you maintain a database of registrants (i.e. a membership list), you can pass that data to a registration form.

See Pre Populate Forms (API)

4. Discount codes may be quantity restricted now. If you have a limited number of discounts available, you can specify a limit.

See Discount codes

5. Taxes and Fees may be added to your event pricing.

See Taxes and Fees

6. There are several new selection options in the Report Builder.

See Report builder

7. There are several new options available when setting up registration types.

See Registration type

8. You can optionally offer your registrants an option to automatically add your event to their electronic calendars.

See Include an Add to Calendar button

9. Free events are now limited to one ad supported event. Subsequent free events that are operated at the same time must have ads removed (.50 per checkout charge). We have also changed our terms of service regarding high volume free events and may either restrict the volume or ask for a subscription to offset high costs to support large volumes of free registrations.

Also, we have noticed that a few clients do not understand our terms regarding events that must be paid for by registrants. Those events are not free, regardless of how the client collects funds. Any event that requires payment, must have the payment noted in the registration and thus will be charged a fee by PlanetReg.

10. We have added an explanation regarding exactly how our inventory control functions. This is occasionally an issue for projects that have critical availability and short registration windows.

See Inventory control

11. As an administrator, you may now update/ change registration type on any registration.

See Attendee maintenance

12. We have added examples of the Paypal Pro vs Paypal business account usage to the description of Paypal Pro.

See Paypal PRO

19 November 2015

1. Sessions.

Sessions provide a way to ask for priced and/or inventory controlled items on a registrant by registrant basis. The traditional usage of the word implies a list of options/ classes/ etc., occurring at the same time, with registrants asked to choose from one of several. The option can also be used for simply asking individual registrants to choose optional, priced or unpriced options.

The following table will give you a guide as to when to use which type of question format on the Questions page:

Need Answer for each registrant	Need Price	Need Inventory	Use
NO	YES	YES	Additional Items
NO	YES	NO	Additional Items
NO	NO	YES	Additional Items
YES	NO	NO	Custom Question
YES	YES	NO	Sessions
YES	NO	YES	Sessions
YES	YES	YES	Sessions

See Sessions for additional examples and more details.

2. Personalized link to your event.

You now have the option to personalize your event link. Rather than: htttp://www.planetreg.com/E1119124098723 you can publish: http://www.planetreg.com/2013 Denver Annual 10k For Hunger.

See Publish event for more details.

3. Record attendance.

You can now record attendance at your events.

See Record attendance for more details.

4. Administrators can now change more registrant data, including additional items.

Changes to priced items will result in a new invoice being generated. If a balance is due, the registrant can login to their record and make a payment using any of the payment methods you allow.

See Attendee maintenance for more details.

5. A new help section on waitlist handling has been added.

Whether you need to waitlist admission to your event or waitlist sessions within your event, this discussion will help.

See Waitlist considerations for more details.

3 August 2014

1. Dynamic landing page.

You can now have your events populate a landing page automatically. This feature is designed for users who have on-going events, such as training sessions. As soon as you open an event, it will appear on your landing page and will persist until you close it.

See Dynamic event display on landing page

2. Combined inventory for registration types.

If you have an event with inventory control at the registration type level, you can now enter a combined inventory that cannot be exceeded. An example might be an event where you have a maximum of 100 seats and you have 2 registration types - one for regular members and one for guests. Should you want to limit guests to 20 seats, you can now specify your 100 seat maximum, while also limiting guests to 20 registrations maximum while allowing up to 100 regular members. The total will not exceed 100.

See Setting overall inventory

3. You can turn off ads on the event dashboard.

Free events in PlanetReg are ad supported. If you prefer not to see ads, there is a link on the event dashboard to turn off ads. There is a cost for that - .50 per checkout. You can turn ads back on at any time.

See Event home overview

4. You can create a register button from the dashboard.

If you wish, you can use the event dashboard to create a colorful 'register' button for your web site. There are a few restrictions depending on the type of web software you are using, but they are explained in the new function.

See Publish event

5. You can set up your event questions in a way that eliminates the 'Contact' box on your registration forms.

In the past, PlanetReg required a contact box at the beginning of each registration in the questions screen. This has been changed so that you will not see that box **if you require email address** in the standard questions. If you do, the contact panel will not be created. A contact section will still be created, but it will use the email address of the first registration entered. If there are multiple people entered for a registration, the first email will become the contact. The review screen will continue to show the contact box and there will be an edit button for that box if the registrant prefers to have a different contact email address - including an email address that is not present on the registration.

The 'Find me' panel on the registration screen will now allow either an email or last name as an entry. Last name is not required.

See Using the email standard question

6. We have greatly expanded the help section on Paypal.

Paypal help goes into more detail regarding how PlanetReg interfaces with Paypal see Paypal issues for details. We also discuss what to do when your Paypal processing fails When my Paypal fails.

For heavy credit card users, we suggest you take a look at: Paypal PRO, and if you are a non profit organization, you should take advantage of a significant discount on your credit card and other processing fees with Paypal Have a non profit - get a break from Paypal.

7. The FAQ (Frequently Asked Questions) has been substantially expanded and reorganized.

The FAQ section has been separated into new categories that make it easier to find what you are looking for:

Fees
Setup
Operation
Paypal
Email

See also

Welcome
Sample Events
Getting started
Using the mini-editor
Edit General section
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Text and Email
Edit Survey
Edit Extras

PlanetReg

Online **Help**


What's new with PlanetReg


Sample Events


Getting started


Using the mini-editor


Edit General section


Edit Layout


Collect info for one registrant only


Edit Questions


Edit Text and Email


Edit Survey


Edit Extras


Event Home-Manage


Other Management tasks


FAQ

Welcome

Welcome to our online help system. Browse through the help pages by clicking on the links above or selecting pages in the table of contents. To quickly find specific product information, enter search criteria in the search box above and click the search button.

Ask Someone

If you're unable to find what you're looking for please check the Need more help section.

Enter Conditional Content Here Home > Welcome > Overview of PlanetReg

Overview of PlanetReg

Planetreg is a web based tool that you can use to register people for your events using the internet.

You have complete control over how your event will be presented to potential attendees. Some types of events where you could use PlanetReg:

- Family reunion
- Athletic training and events
- Seminar
- Corporate meetings
- Church
- School retreat
- Mission trips
- On line seminars
- Ticket sales
- Trade show
- Class reunion
- Neighborhood gatherings
- Sport Team sign up
- Club meeting
- On line training
- Membership sign up
- Membership renewal
- Summer camp
- Scout outing
- Band camp
- School trips
- Library
- Volunteer schedules
- Parties
- Plus many other uses

You can collect attendee fees using Paypal, which accepts credit cards or Paypal accounts. You also have the option of having your attendees send you a check or pay you at your event.

To use Paypal for payment, you must have a Paypal account. To accept credit cards, you need a Premier or Business Paypal account. See: Paypal for details on how to set up an account or how to upgrade your personal account to a Business account.

If you have your own credit card merchant account, we can handle that too. You must obtain an internet credit card processor to use this feature. There are several available and we can give you a recommendation for processors that we have used in the past. Even with your own credit card processor, we would recommend that you also use Paypal as a convenience to your clients/ users.

Internet gateway processors currently supported:

```
Authorize.Net
eProcessing Network (ePN)
eWAY
Paypal Payflow Pro
Sage Payment Solutions
USA ePay
SecurePay (USA)
SecurePay (AUS)
GoEmerchant
Fat Zebra
Paystream
Stripe
BluePay
Merchant One
Elavon - Converge
BlueFin - PayConex
eWay Australia
Payeezy - First Data
CardConnect
MX Merchant
Payment Data Systems
```

Note that the default payment method in PlanetReg is Paypal. If you wish to use any of the above options, you must let us know and we will condition your events to point to one of those options. Each of the above options (other than Paypal) requires that we adjust your account accordingly. If you are using a processor that is not shown above, please contact us and if it has internet gateway we can usually integrate it with our system.

We are always adding new ones, so please check with us for the latest list.

PlanetReg is designed to support multiple currencies. If you use Paypal, these currencies are supported: https://www.paypal.com/cgi-bin/webscr?cmd=p/sell/mc/mc_receive-outside

If you do not see your currency in that list, let us know. We can usually accommodate any currency.

A significant percentage of our clients reside outside the United States. We have many **Canadian, Australian, European** and **New Zealand** users. Most of the field names and other descriptive data can be edited and presented in a language other than English.

If you operate your events in the European Union or have European Union registrants you should know about the latest EU privacy rules – the GDPR http://www.planetreg.com/pr/whatisgdpr.pdf. Very important if you or your registrants are subject to these new rules

PlanetReg is a product of HEMKO Systems Corporation. HEMKO has over 40 years of development experience in the meeting industry. We have been doing internet registration systems since 1996 and have registered millions of people through our software.

As part of the PlanetReg help system you will frequently see YouTube video screens.

The YouTube video presentation will illustrate a feature of PlanetReg.

In some cases you will not be able to see the videos in full screen - if you prefer full screen, click **YouTube icon** and ask to view the video in YouTube. That will provide the option to view in a separate window and in full screen mode. These issues are relevant only to viewing on your computer monitor.

Another option to make the video larger is to hold the Ctrl key and use your mouse wheel to enlarge or decrease the video size.

When viewing on a phone or tablet, the video will be adjusted to allow for smaller screen sizes.

Below is a brief tutorial highlighting the basic feature of PlanetReg:

Use this icon to see the video in large and separate window:

See also

Need more PlanetReg help?

Home > Welcome > Need more PlanetReg help?

Get help from Customer Support or other resources

Ask Someone

If you are having problems setting up your registration using PlanetReg, please give us a call or email us (see below will help you, talk you through it or do it for you (no obligation).

PlanetReg is constantly under development, so there will almost always be minor discrepancies between the softwa help system. Bear with us, we try to keep everything up to date as well as we can.

Customer Support

Contact our customer support department by email at support@planetreg.com or by phone at:

(800) 549 2450

Index

It is sometimes easier to click the Index icon to find what you are looking for. If in a pinch, give it a try.

Frequently Asked Questions (FAQ)

Check out the FAQ section of help: FAQ

Sample Events

Listed below are several sample events that you can look at. If you click on the event image, the actual event will open in a new window. All of the events are dummy events, so please feel free to try them.

Some events have a video link that you can use to see how the event was built.

Please note that many of the events were built using an earlier version of PlanetReg, but all of the features and functions displayed (plus many more) are available in the current version.

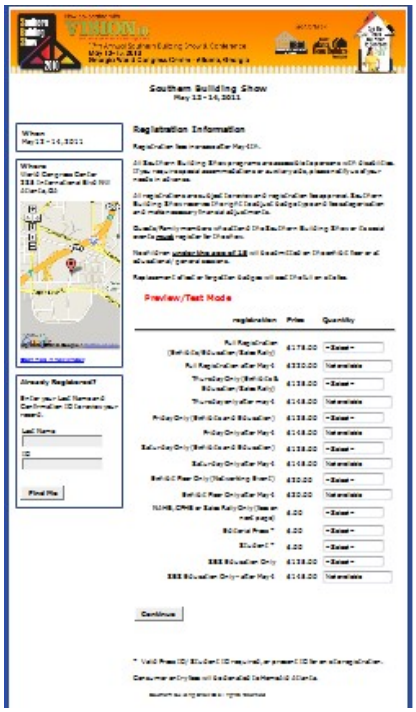
Wine Tasting Fund Raiser

Shows:

- collecting data for buyer only
- selling multiple items
- soliciting for donations
- custom question

If you would like to see a video of how this event was built (7 minutes, 13 seconds).

Wine Tasting



Southern Building Show - Trade Show

Shows:

- extensive registration types
- early bird pricing
- extensive custom questions
- custom questions conditioned by registration type
- extensive additional priced items
- donations requested

Family Reunion

Shows:

- custom questions
- inventory control
- additional priced items
- multiple registration types
- data is gathered for all registrants

If you would like to see a video of how this event was built (6 minutes, 43 sec):

Family Reunion

Swim Club Fund Raising Party

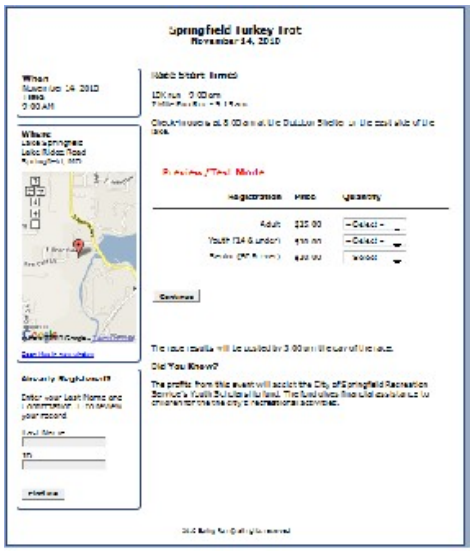
A party to benefit the high school swim club.

Shows:

- selling multiple items not related to registration type
- soliciting for donations
- additional priced items
- collecting data for the buyer only

If you would like to see a video of how this event was built (5 minutes, 50 sec):

School Fund Raiser



10K Race and Fund Raiser

A race which benefits youth scholarships.

Shows:

- discount codes
- waiver
- additional priced items
- collecting data for all attendees
- collects age and gender info

Family Reunion in Ireland

Shows:

- use of Euro currency
- extensive custom questions
- register by type
- additional priced items
- provision for US and European addresses
- data is gathered for all registrants/ attendees.

If you would like a demonstration video of how this event was built (14 minutes, 30 seconds).

Ireland Reunion

Motorcycle Rally

Shows:

- discount codes
- register by type
- additional items exposed based on registration type
- custom questions
- data is gathered for all registration types.

If you would like a demonstration video of how this event was built (12 minutes, 43 seconds).

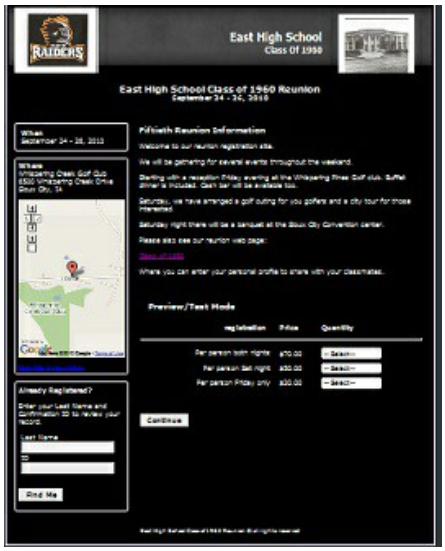
Motorcycle Rally

Conference

A business conference in Las Vegas.

Shows:

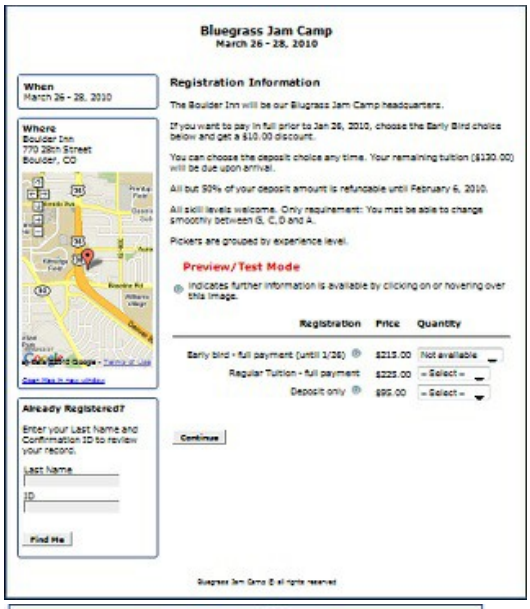
- early bird pricing
- multiple education tracks
- additional priced items
- collecting data for all attendees



High School Reunion

Shows:

- custom questions
- register by day attending
- additional priced items
- data is gathered for all registration types.



Bluegrass Jam Camp

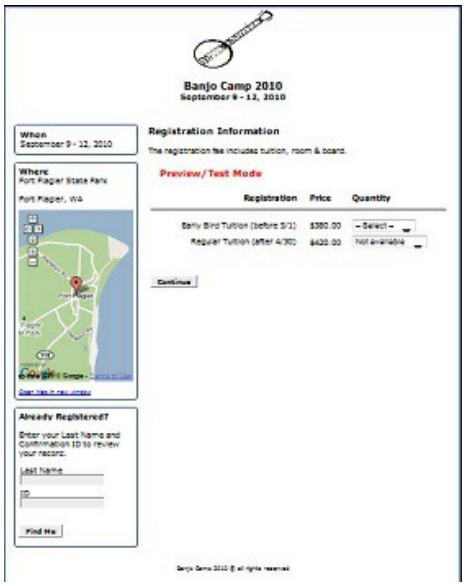
Shows:

- early bird pricing
- extensive custom questions

Seminar

Shows:

- custom questions
- data is gathered for all registration types.



Banjo Camp

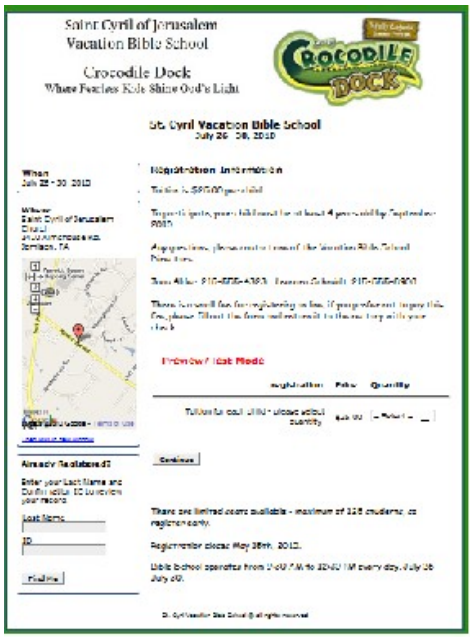
Shows:

- extensive custom questions
- data is gathered for payer only
- extensive additional priced items
- early bird pricing

Basketball Camp

Shows:

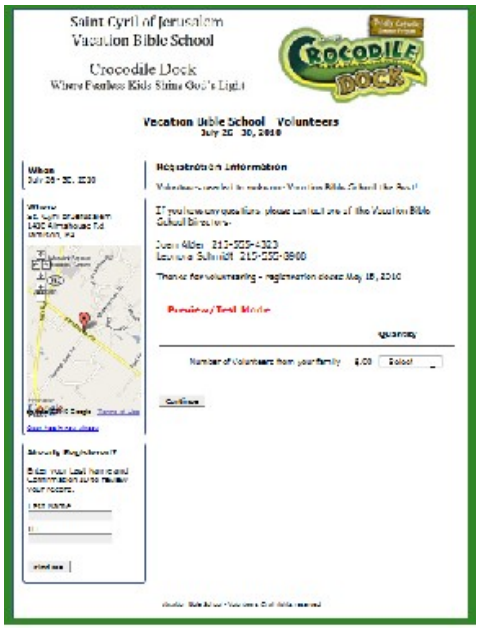
- waiver
- extensive custom questions
- data is gathered for each registrant
- extensive pricing options



Bible Camp

Shows:

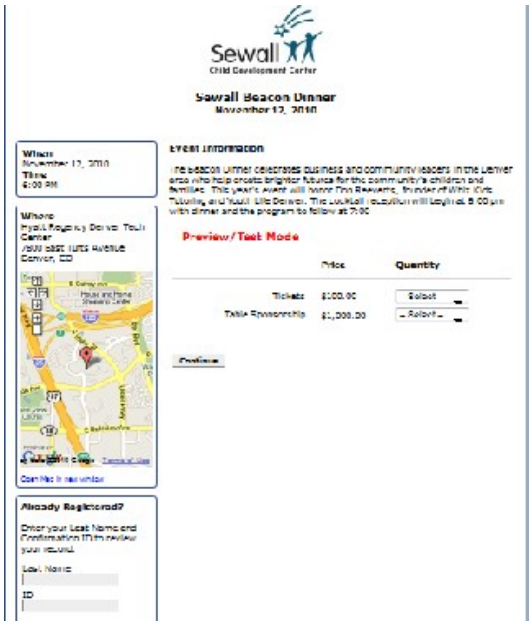
- custom questions
- data is gathered for each registrant



Bible Camp Volunteers

Shows:

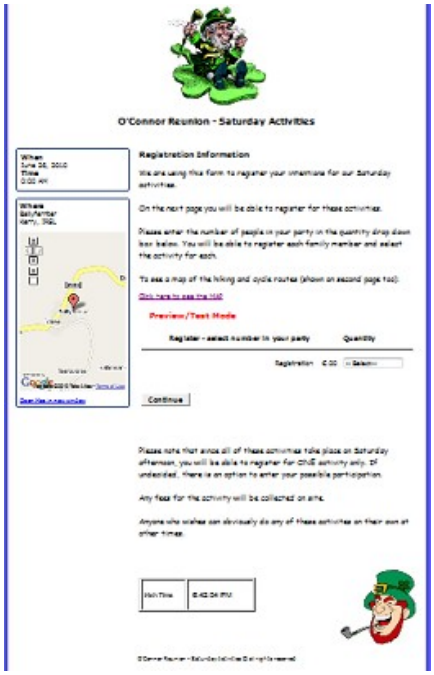
- extensive custom questions
- data is gathered for each registrant
- Free event
- Limited volunteers by age group
- Questions asked based on registration type



Charity Dinner

Shows:

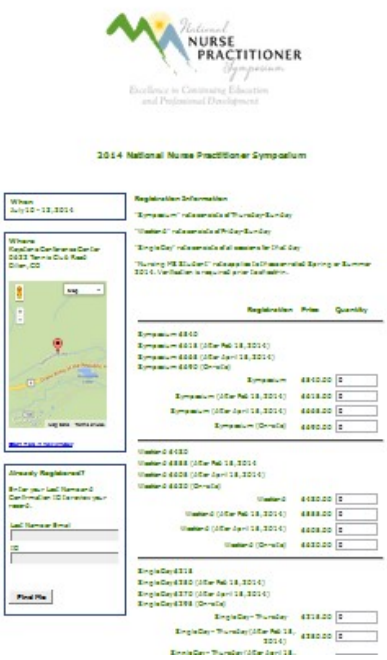
- data is gathered for buyer only
- sell individual tickets or a complete table



Reunion Activities

Shows:

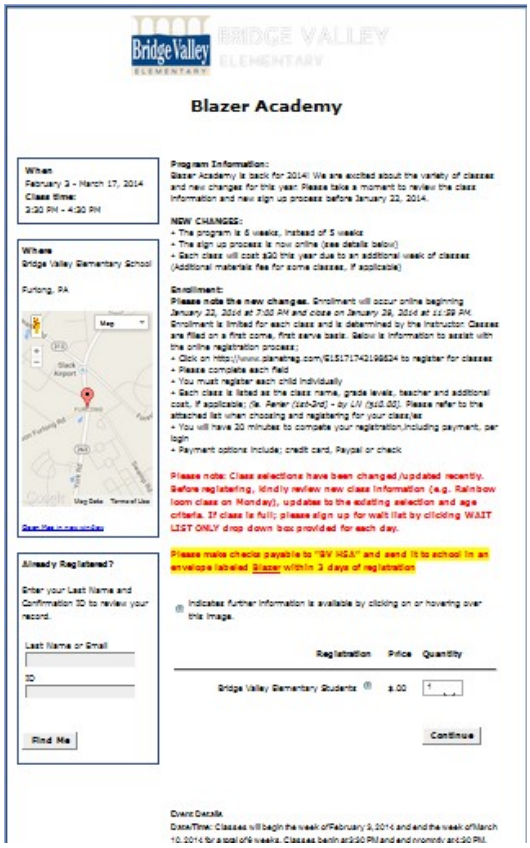
- extensive custom questions
- data is gathered for each registrant
- Free event
- Map imbedded in custom questions



National Nursing Convention

Shows:

- Extensive Registration choices
- Extensive use of Sessions



Educational Academy Enrollment

Shows:

- Extensive use of Sessions

Home > Sample Events > Sample Event videos

Sample Event videos

Wine Tasting

Family Reunion

School Fund Raiser

Ireland Reunion

Motorcycle Rally

See also

Wine Tasting

In some cases you will not be able to see the videos in full screen - if you prefer full screen, click **YouTube icon** and ask to view the video in YouTube. That will provide the option to view in a separate window and in full screen mode. These issues are relevant only to viewing on your computer monitor.

Another option to make the video larger is to hold the Ctrl key and use your mouse wheel to enlarge or decrease the video size.

When viewing on a phone or tablet, the video will be adjusted to allow for smaller screen sizes.

See also
Family Reunion
School Fund Raiser
Ireland Reunion
Motorcycle Rally

Family Reunion

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See also

Wine Tasting
School Fund Raiser
Ireland Reunion
Motorcycle Rally

School Fund Raiser

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Wine Tasting
Family Reunion
Ireland Reunion
Motorcycle Rally

Home > Sample Events > Sample Event videos > Ireland Reunion

Ireland Reunion

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See also
Wine Tasting
Family Reunion
School Fund Raiser
Motorcycle Rally

Home > Sample Events > Sample Event videos > Motorcycle Rally

Motorcycle Rally

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Home > Getting started

Articles in this section


Create an event


Context help

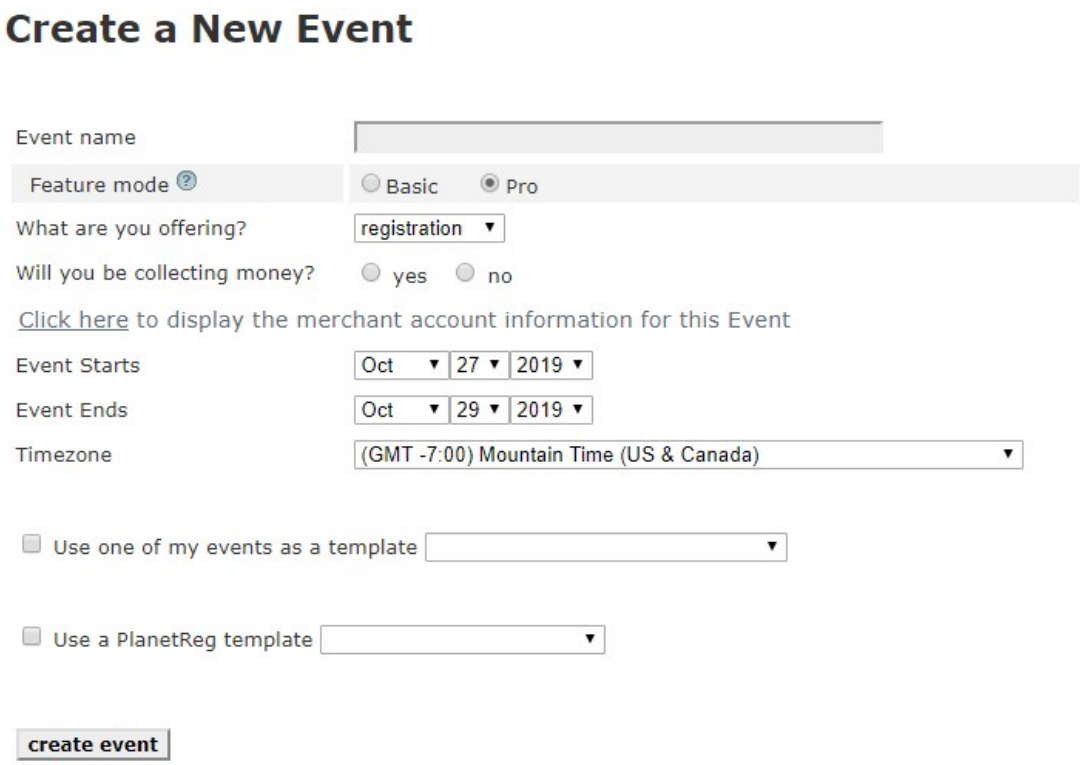
See also

What's new with PlanetReg
Welcome
Sample Events
Using the mini-editor
Edit General section
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Text and Email
Edit Survey
Edit Extras
Event Home- Manage
Other Management tasks
FAQ

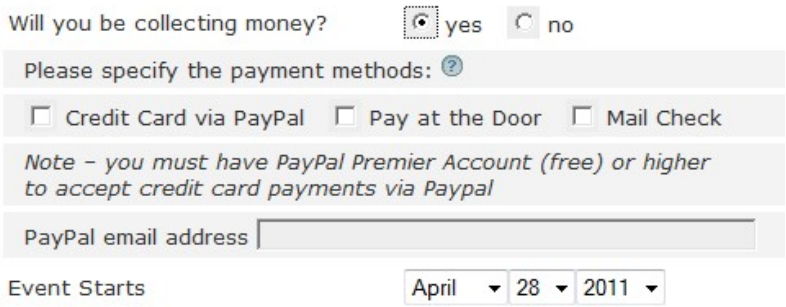
Home > Getting started > Create an event

Create an event

As soon as you complete the Sign up screen, you will be directed to a screen where you can provide basic details of your event:



If you specify that you will be collecting money (click the yes button), the screen will be expanded to include this dialogue:



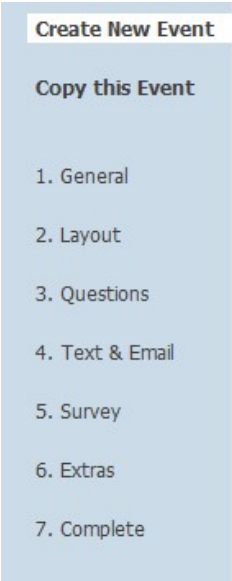
If you specify Credit Card via PayPal you will have to enter your PayPal email address. Note that registrants with PayPal accounts can pay with their PayPal balance or a credit card.

If you have a merchant account and we have installed it for you, you will see a different display, including credit card types that you have approved.

If you know that your event will not be using the Pro mode of Planetreg, you can select the Basic mode on this screen.

See: Basic vs Pro Mode

When you create an event, you will be stepped through the various screens available for any event:



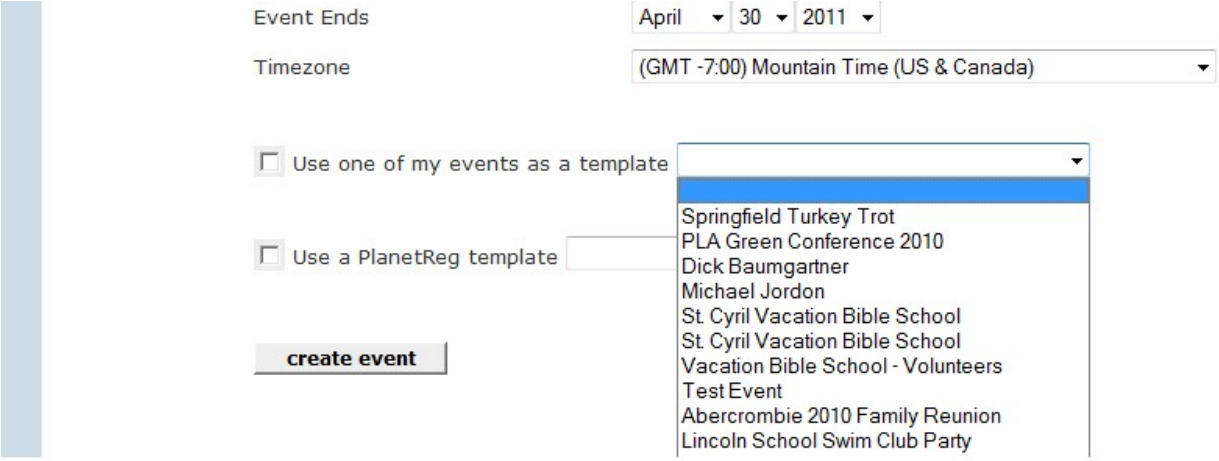
You can complete all of these screens as they are presented, or you can just click the next link at the top of each page, then return to each of the screens at your leisure and complete them.

You can alter any of these screens at any time, including after your event has started.

Enter your event name/ title. You can select the type of items that, for example registration, that you will be selling for your event. If you don't see what you are selling, just pick the 'other' choice and you will be given the opportunity to enter your own text.

This data - what you are selling - can be changed at any time on the Setup Tab (Edit General section).

Select the start date and end date for your event.



To do this, click the check box and use the drop down list to select one of your events. This can save a lot of time as most of the data will be copied over to the new event.

You can also use a pre-defined PlanetReg template to start your definition.

We often add new templates for your use.

If you copy from a template, you will still need to edit all of the setup screens to correspond to your event.

Enter your Event Name/ Title, select the start and end dates for your event and choose the time zone.

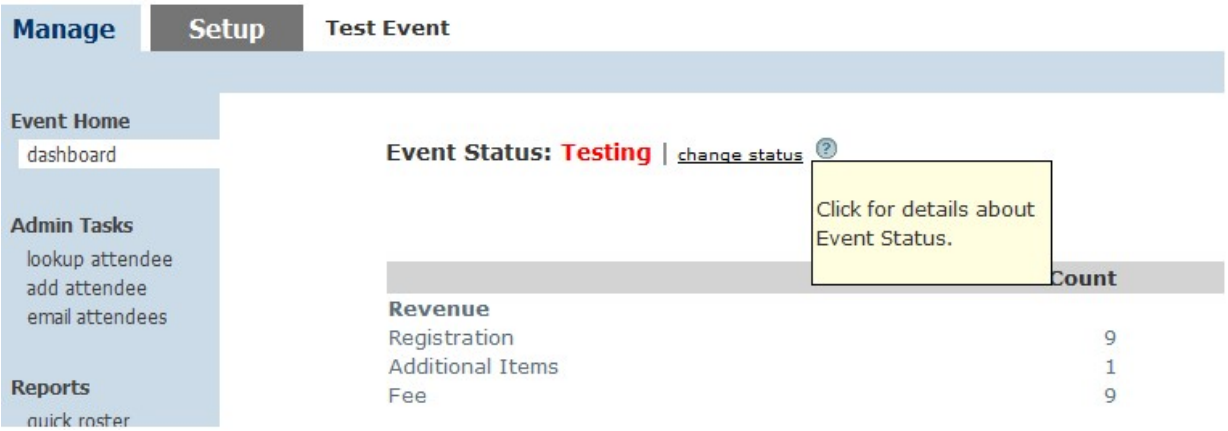
The time zone is relevant to the end date and time for your event. You will have the opportunity, later in the set up of your event, to set an end date and time with regard to accepting registrations for your event. See Edit Settings

See also
Context help

Home > Getting started > Context help

Context help

Throughout the definition screens you will see small question marks.



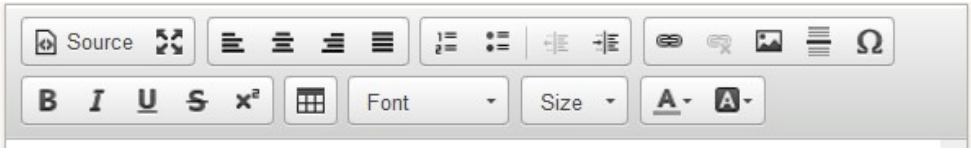
If you have a question about that item, you can click on the question mark and the help for that section will appear in a new window:

See also

Create an event

Using the mini-editor

You will see this editor in several spots on the system - the icons at the top of the editor:



Expose Source

The Source icon will change the editing mode to show you the source HTML code. In some cases you may need to do this.

Source of the above reunion text looks like this:

```
<span style="font-size:larger"><span style="font-family:arial"><strong>Welcome to the Abercrombie family reunion registration site</strong></span></span>.<br />
<br />
We are looking forward to a large gathering this year. Our reunion will be held at the Holiday Inn in Estes Park Colorado (800-315-2621). Your registration includes Friday night reception with a cash bar and a Saturday night banquet at the Holiday Inn. The banquet will feature entree choices of beef, chicken and grilled salmon. We will want you to indicate your choice on the registration form. You may register multiple family members on the same registration form. Just pick the quantity of each registration type below. You do not need to register children aged 5 and under.<br />
<br />
We have also arranged for an optional Saturday bus tour of Rocky Mountain National Park. Please indicate on the registration form if you would like to participate. This is a four hour tour, departing at 8:00 am, price is 15.00 per person.<br />
<br />
We are looking forward to seeing all of you again - the last reunion was a huge success!<br />
 
```

If I want to reference another document with a 'click here' type link, I would have to (however briefly) expose the Source.

The general method of including a document reference is to use this model:

--description of download--

I have used the Upload files to upload a pdf file that contains my Code of Conduct.

I asked for the link in my Upload files:

and was provided with this link:

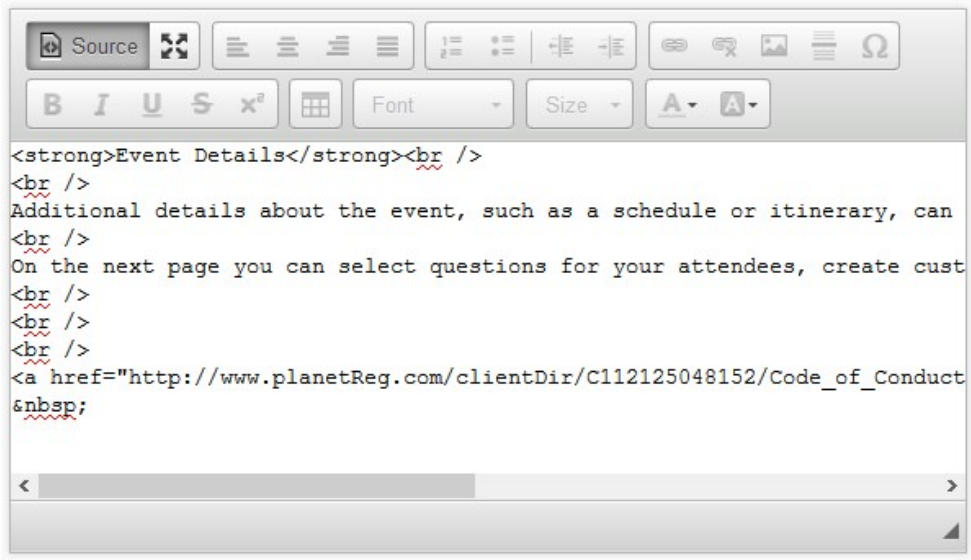
http://www.planetReg.com/clientDir/C112125048152/Code_of_Conduct.pdf

The best way to construct my final entry is to use a program like Notepad to set it up:

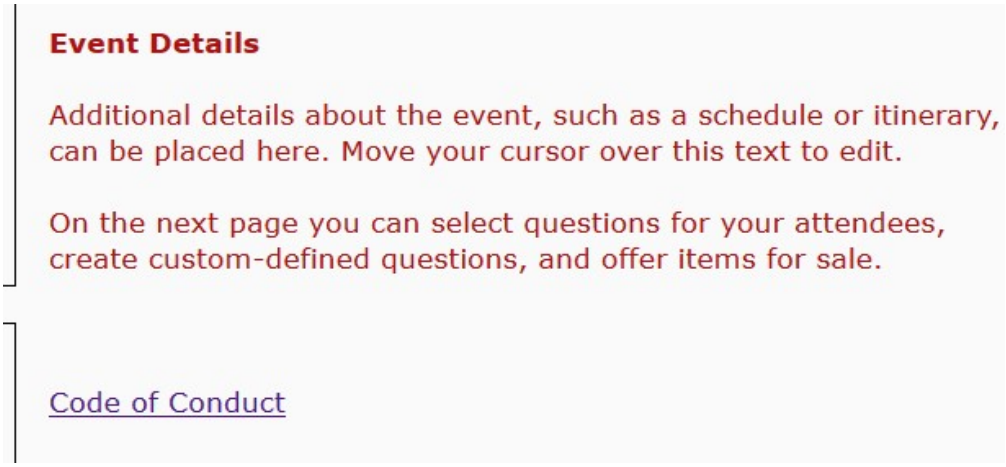
Code of Conduct

There is no problem setting this up directly in the panel I am editing, it's just easier to use Notepad.

I ask to expose Source, copy and paste this entry in the appropriate spot:



The final look - after I save the edited panel looks like this:

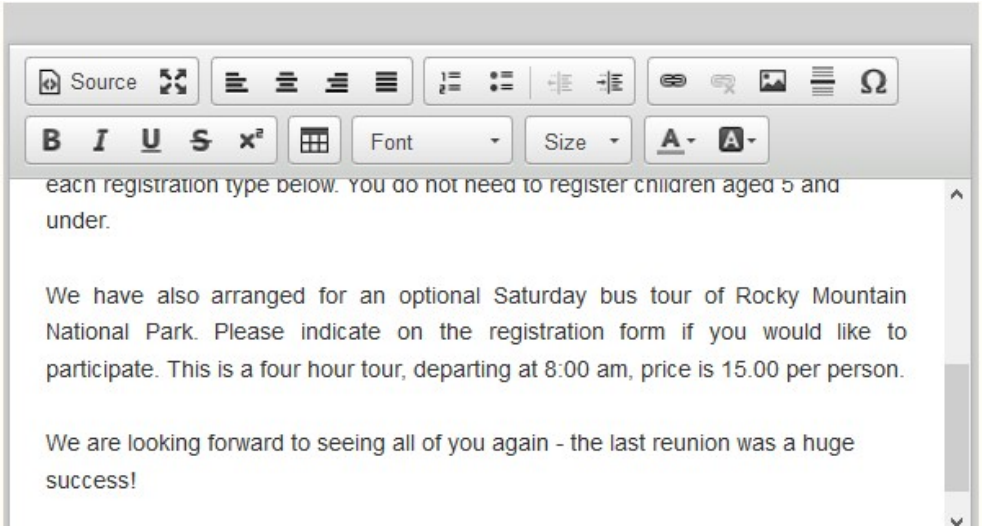


The icon that shows four arrows pointing to four corners will turn your editing space into a full screen mode - can be easier to handle if you have some dense text.

Justify Lines

The next four icons allow you to justify lines of text - Left, Center, Right and Justify. What Justify does is to add extra spaces to your text lines so they come out perfectly aligned right and left:

The middle paragraph is 'Justified':



Bulleted and Numbered Lists

The next 2 icons showing numbers 1 and 2 as well as bullet points allow you to create numbered or bulleted lists:

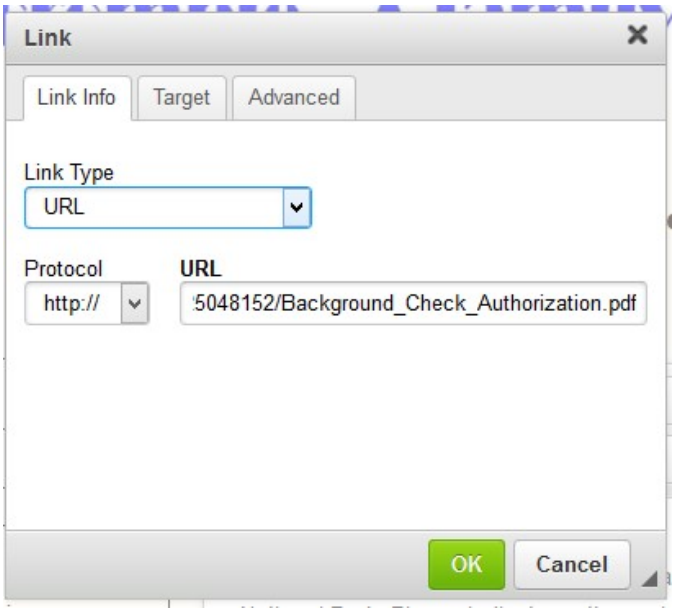
1. First Item
2. Second Item

- First Item
- Second Item

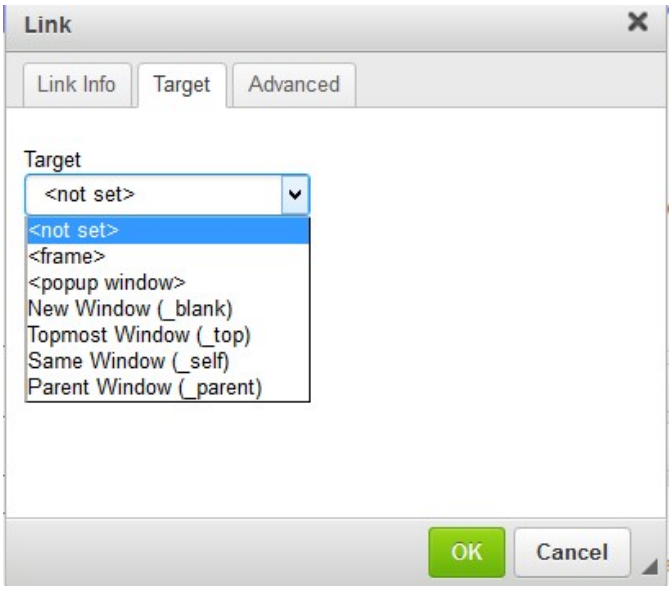
The next two icons allows you to indent parts of your text (the second icon) or remove the indent (the first icon). This text is indented.

Links

The icon that looks like a chain link is used to insert a link to an external file. Click that icon and you will see this dialogue:



You can paste in a URL (like above) - in this case a .pdf file that we have loaded for retrieval - See Upload files.



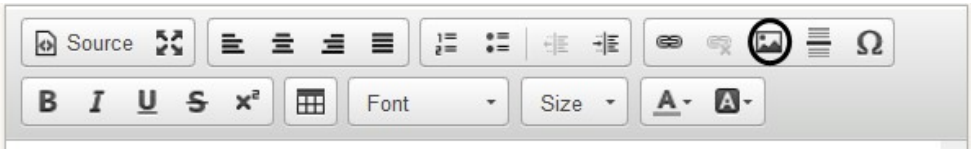
If you click on the Target Tab, you will be able to choose how the link will be displayed. Usually the best approach is to choose a 'New Window'.

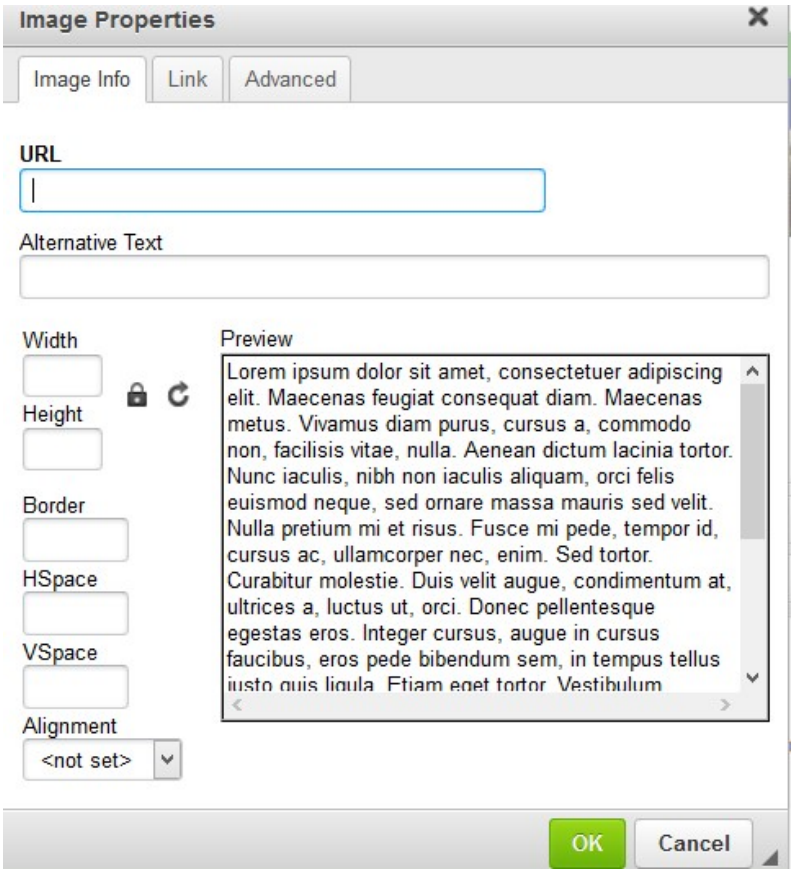
Note that this is an alternate way to show additional documents on your form without exposing the source. It has the disadvantage that the final result will be a raw link showing on the page:

The results are identical - click the link to see the pdf - but the first method looks nicer.

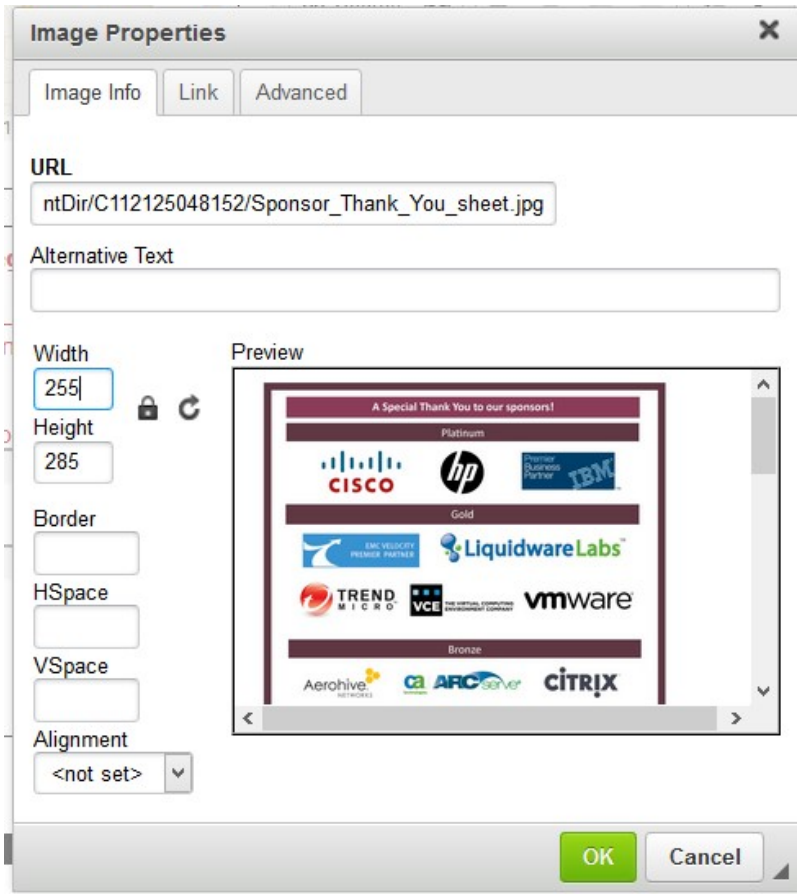
Image

The next icon - looks like pair of mountains - can be used to insert an image into the panel:





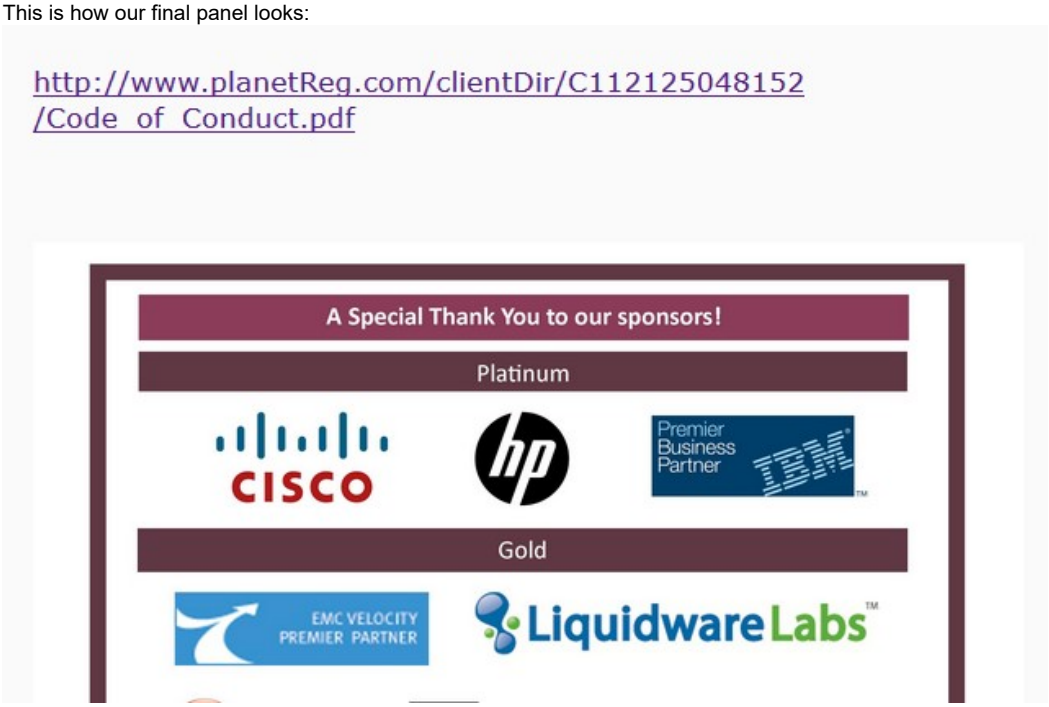
We have pasted the link to an image we have uploaded using Upload files and the image is displayed:



If the image is too large or too small, you can adjust the width and/or height as shown.

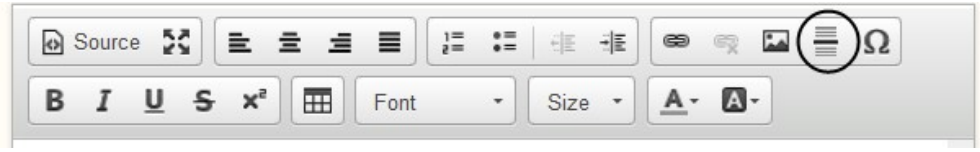
If you want to edit the image after saving it, just edit the panel, click on the image and then click on the image icon (the mountains).

This is how our final panel looks:



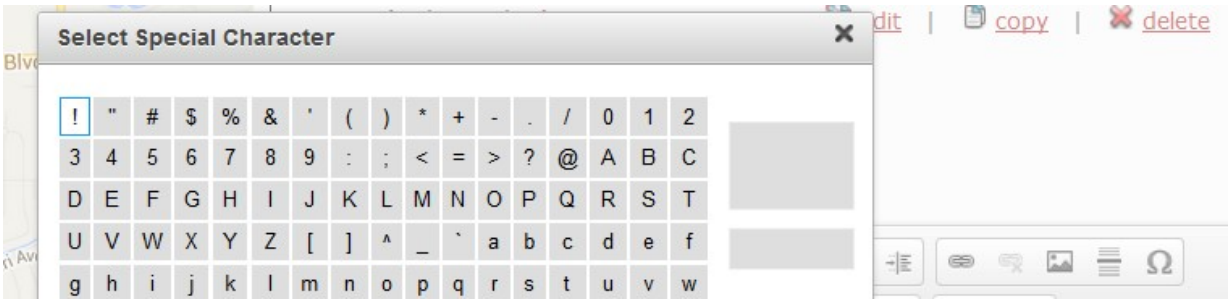
Horizontal Line

The next Icon - showing a bold line amid lines of text allows you place a horizontal line in your panel.



Insert Special Character

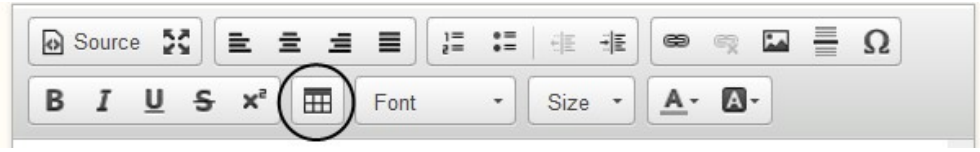
The Omega symbol at the end of the icon panel will allow you to insert a special character into your text:



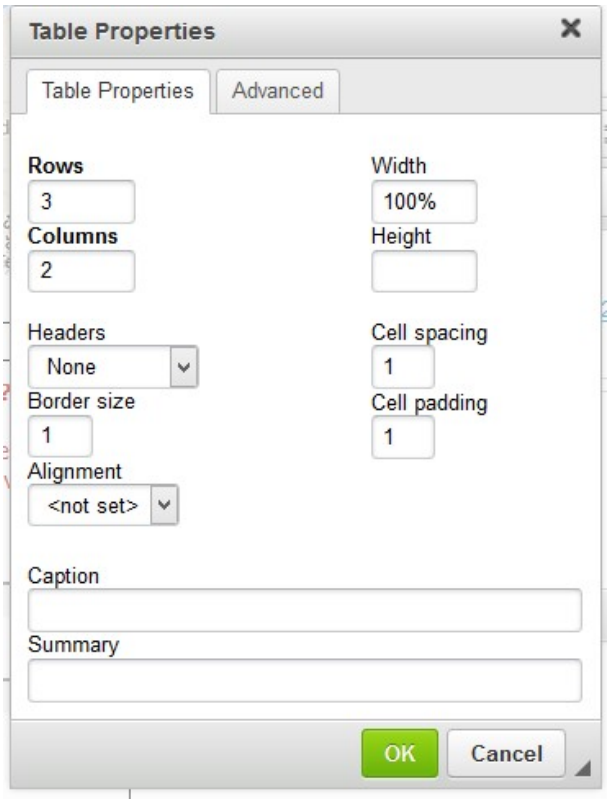
The second line of icons have to do with the type, size and color of your text and are pretty self explanatory.

Table

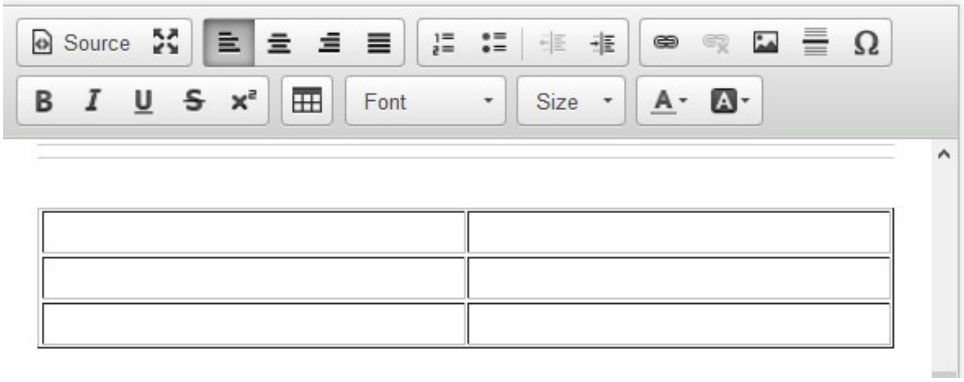
The only icon that looks somewhat mysterious is the insert table icon:



When you click the table icon you will see:

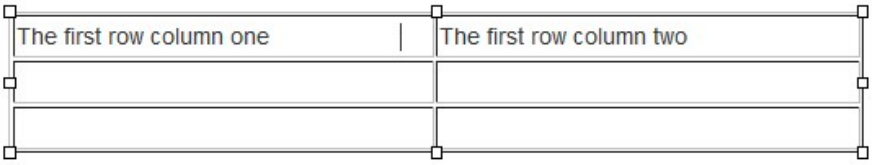


You can enter the number of rows and columns needed for your table. In this case 3 rows and 2 columns:

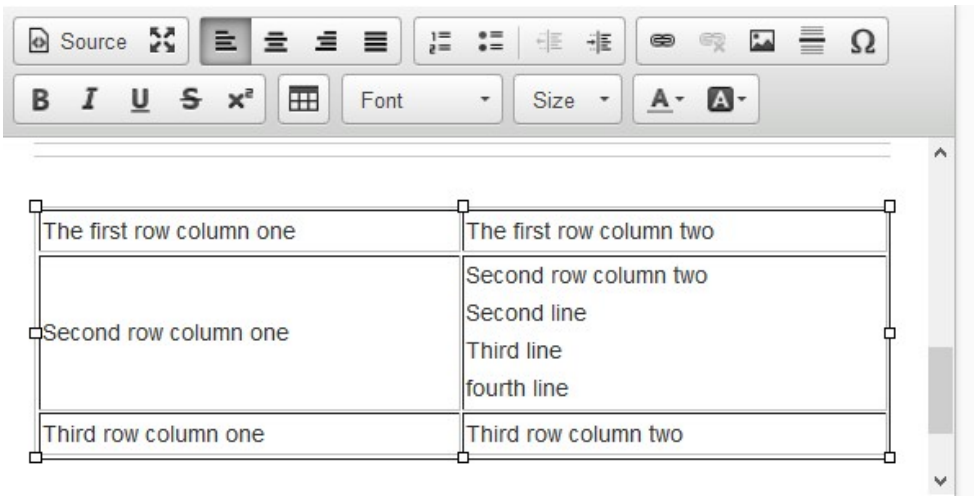


When you key into the cells, you will notice that the cell boundary moves - key in row 1, cell 1 and the boundary moves right. To offset this, just key data into row 1, cell 2 and the center line will move left.

You can enter spaces at the end of either cell to align the center line:

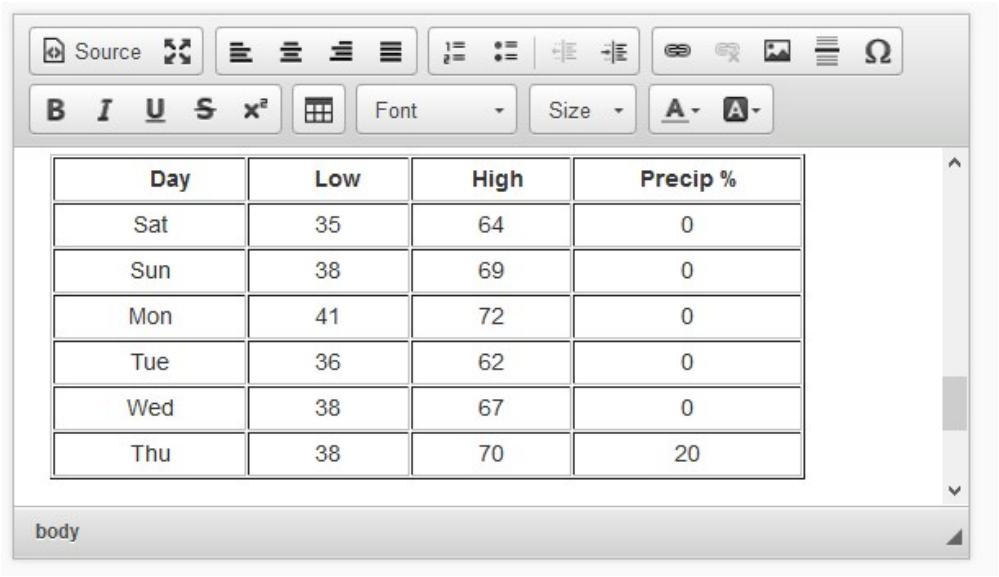


It is a bit like pushing down on a bowl of jello, but it can be done. Once your first row has been entered and aligned, subsequent cells can be entered without a problem:

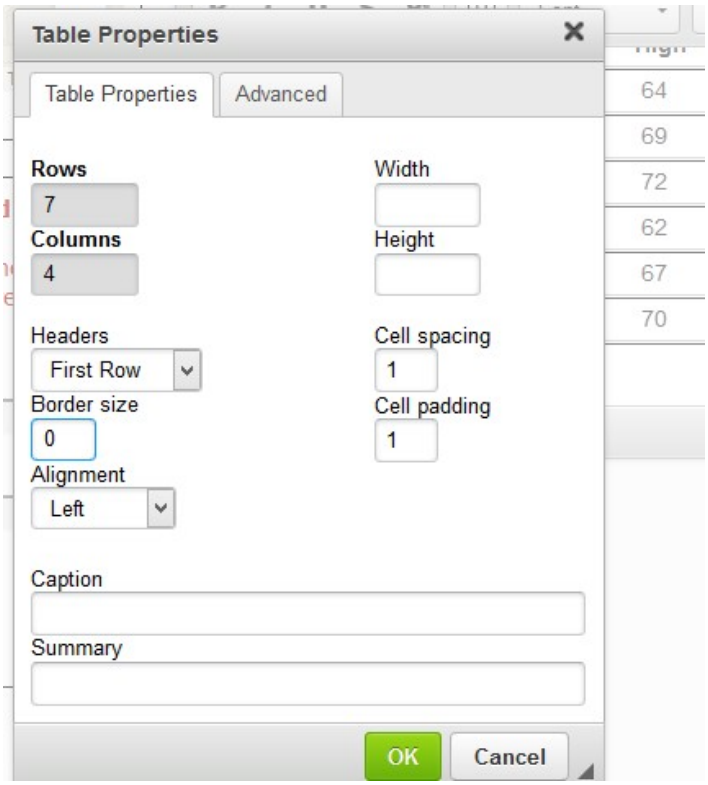


You can also use the table insert to create a columned list of values - without looking like a table.

This is a simple table of temperatures by day - note that I pointed to each cell value and used the center icon on the top row of icons to center each value:



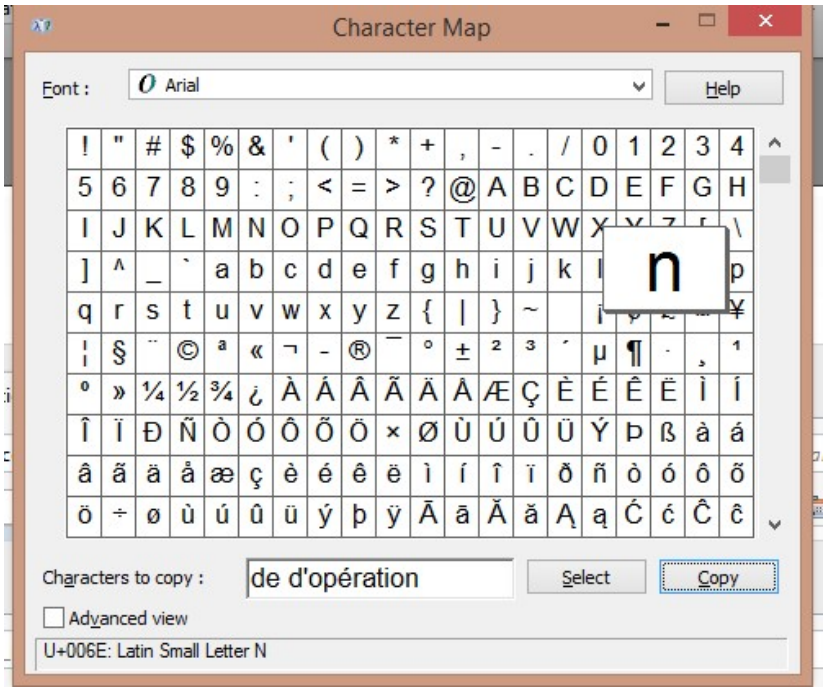
I can alter the look of the table by changing the **border size to zero** - just put your cursor anywhere in the table, right click and click on Table Properties:



After I save and review the panel, it looks like this:

Day	Low	High	Precip %
Sat	35	64	0
Sun	38	69	0
Mon	41	72	0
Tue	36	62	0
Wed	38	67	0
Thu	38	70	20

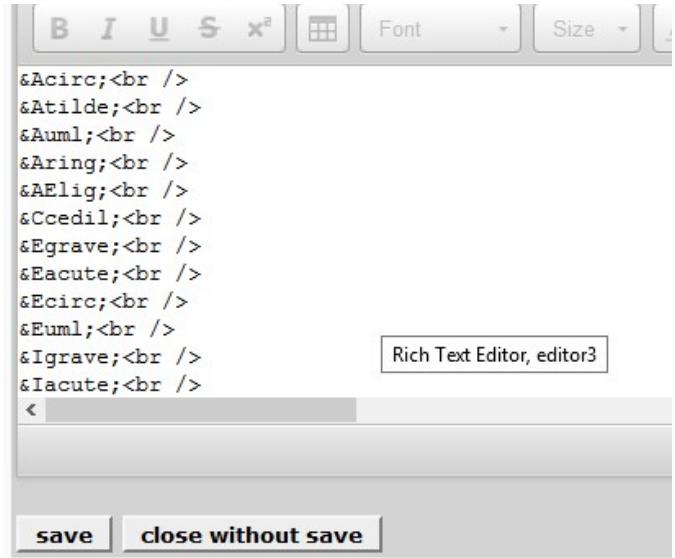
Occasionally you may need to enter accented characters. If you find that your keyboard is not able to reproduce the character, if you are using Windows, you may be able to the Windows Character Map:



In the example above, the Characters to copy box has been filled with characters, including an accented é.

Another approach is to insert the html code for accented character by exposing the Source (see above). Here is a table of html codes for accented characters:

http://www.ascii.cl/htmlcodes.htm



The above panel uses html codes as shown in the link above.

And appears:

Third row column one	Third row column two

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See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Edit General section
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Text and Email
Edit Survey
Edit Extras
Event Home- Manage
Other Management tasks
FAQ

Edit General section

At any time after you finish defining your event, you can return to this section of your definition by accessing the Setup tab and clicking on the General link.

You will see a screen that looks like this:

You can make whatever changes you want, but be aware that several items on this page are replicated in other sections of your event setup - such as the event name. These items may be changed here, but will not be changed in some text areas of your event . Be sure to check all pages to be sure that they have been changed and make changes as appropriate.

If you have a merchant account and we have connected to it, your display of payment types will be expanded to include the credit card types that you accept.

Please be sure that changes to your Paypal account are reflected in individual events . If an eventis created after you begin your setup, it will be copied from here. Events that exist or are 'copies' are NOT changed.

Also, please note that some Paypal accounts do not automatically notify us of transaction completion - please be sure to check your account for Paypal Instant Payment Notification - if this switch is not set, we do not know when a payment is completed.

See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Using the mini-editor
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Text and Email
Edit Survey

Home > Edit Layout

Articles in this section

See also

Home > Edit Layout > Using the Edit/Hide buttons

Using the Edit/Hide buttons

The first screen shown after you define your event is the opening screen that will be presented to your registrants.

This screen has several sections. As your cursor passes over each section you will see these buttons:

edit | hide

Please note that the buttons are hidden until your cursor passes over each section. As you peruse a section, you can decide whether you want to use that section or not use it (Hide it).

If you decide that you don't need it, you can click the Hide button and that section will not be included on your registration form. If you are going to use a section, click the Edit button and you will be shown a data entry screen that allows you to enter your own information for that section.

You can change your mind at any time - even after you have begun accepting registrations. As soon as you Hide a section, there will be a small question mark symbol where that section used to be. If you click the question mark, the section will reappear and you can continue editing it.

The remainder of the Edit help sections will address the data entry functions for each main subsection.

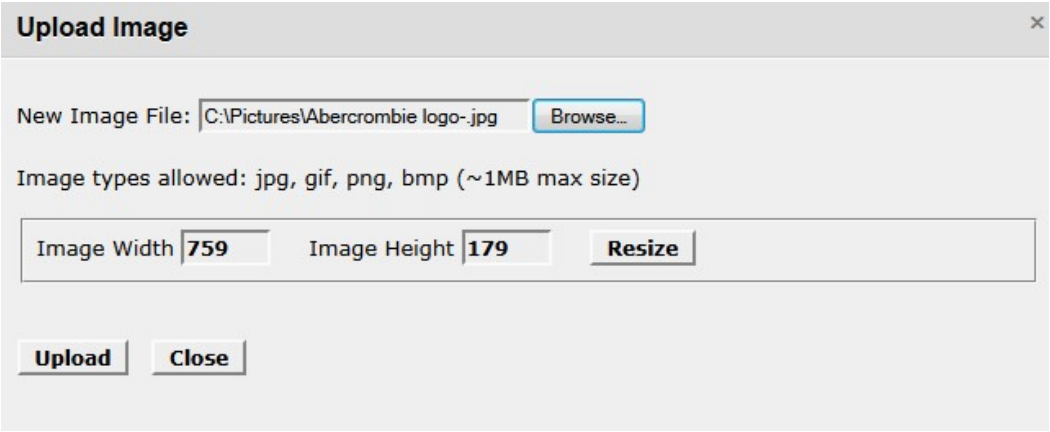
See also

Upload image
When box
Where box
Registration information
Registration type
Setting overall inventory
Event details
Attendee look up
Select or change colors
Preview this page

Upload image

The top section of the opening page can be used to display your event logo. If you do not have an event logo, or prefer to not use this section, just click the Hide button.

When you click the Edit button, this screen will be displayed:



The Browse button will allow you to access your local hard drive or network to select the logo.

The default Image Width and Image Height represent a starting point only.

The upload will attempt to adjust your image for the best presentation.

After you click the Upload button, the image will be loaded and displayed:

If you don't like the size of your logo/ image, click Edit again, change the Image Height and/or Image Width, click Resize and check the image display. You can keep doing this until the image is as you like it.

If you have multiple images, you can use Windows Paint or other software, such as Photoshop to create a single file with multiple or consolidated images.

Occasionally there may be a problem loading certain graphic formats. The best formats for the web include .jpg, .gif or .bmp. Even those formats may be problematic if the file size is too large.

If you have a problem, you can usually use Microsoft Paint or similar to capture an image and save it in a better, more compact format.

One of the most common problems we see is trying to upload an image that is too large. If you use a graphic designer for your image, it will often be quite large. It is very easy to use Paint (part of Windows) to resize your image.

If you would to see an example of how to resize, start the video below.

If you can display an image on your screen, you can use Paint to capture and re-save it in a format that works.

The video below will show you how to convert any image that can be displayed on your screen to an appropriate format.

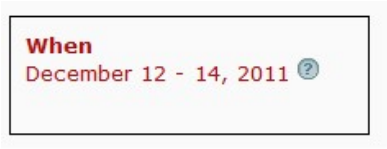
[redacted]

See also

Using the Edit/Hide buttons
When box
Where box
Registration information
Registration type
Setting overall inventory
Event details
Attendee look up
Select or change colors
Preview this page

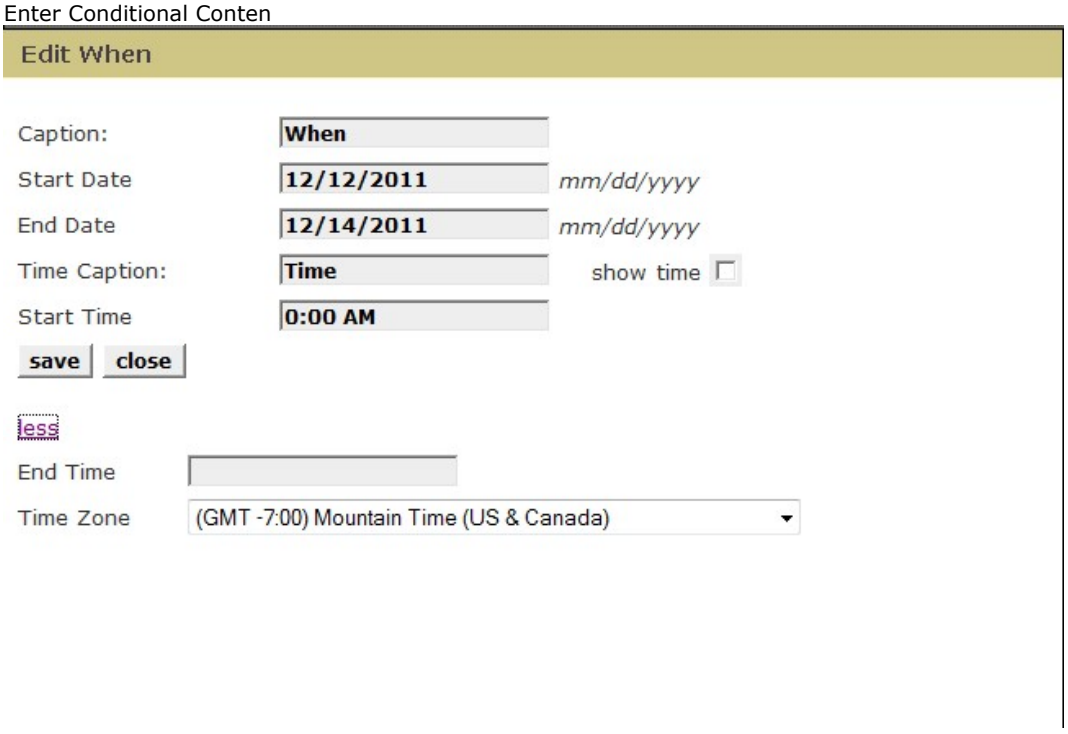
When box

You will notice that there is a small box identified as When on the left side of the opening page:



If you choose to edit this box, you will see this data entry screen:

Enter Conditional Conten



You can choose whether or not to show the time of your event. If time is not relevant, just un-check the show time box. In the case of our example, we have clicked the more button (you will see many of these). The more button presents further options for that item.

You can specify an end time - you might do this if you were defining a seminar, meeting, etc. where the event occurs on a single day within a set time. For example, a single morning training session, from 9:00 am to 11:00 am.

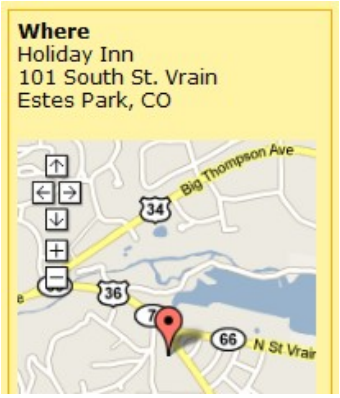
You will note that you can also edit the captions of the When box. You could edit the captions if you wished to present your registration in another language; i.e. Wenn and Zeit for German.

See also

Using the Edit/Hide buttons
Upload image
Where box
Registration information
Registration type
Setting overall inventory
Event details
Attendee look up
Select or change colors
Preview this page

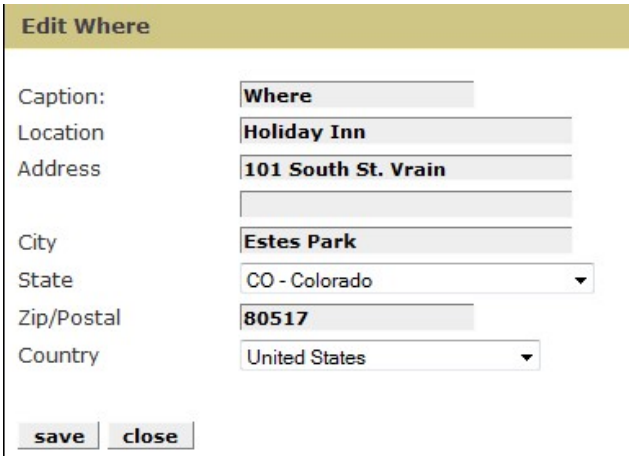
Where box

The Where box is provided to show the location of your event:



This section shows a snippet from Google Maps. When your attendees register, they can expand this map using a small link at the bottom of the Where box. The map will be shown in full size in a new window, where the attendee can zoom in out out to show the exact location.

When you choose the Edit button on the Where box, you will be shown this data entry screen:



You should enter the location and address of your event. When you click Save, the map will be redrawn to show your event location.

See also

Using the Edit/Hide buttons
Upload image
When box
Registration information
Registration type
Setting overall inventory
Event details
Attendee look up
Select or change colors
Preview this page

Registration information

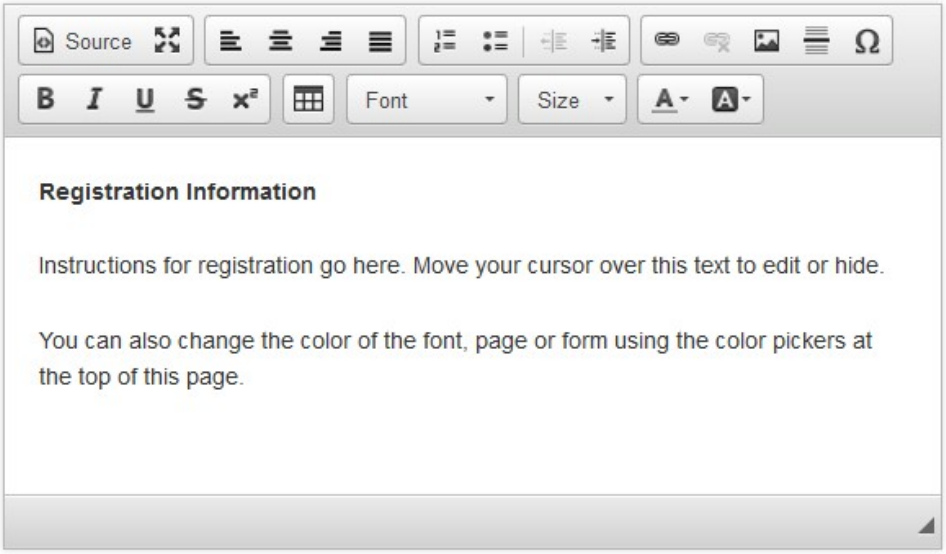
You will want to clearly explain your event to potential attendees. You can use the Registration Information area to do this. When you first see the opening page, this area is filled with a dummy paragraph:

Registration Information

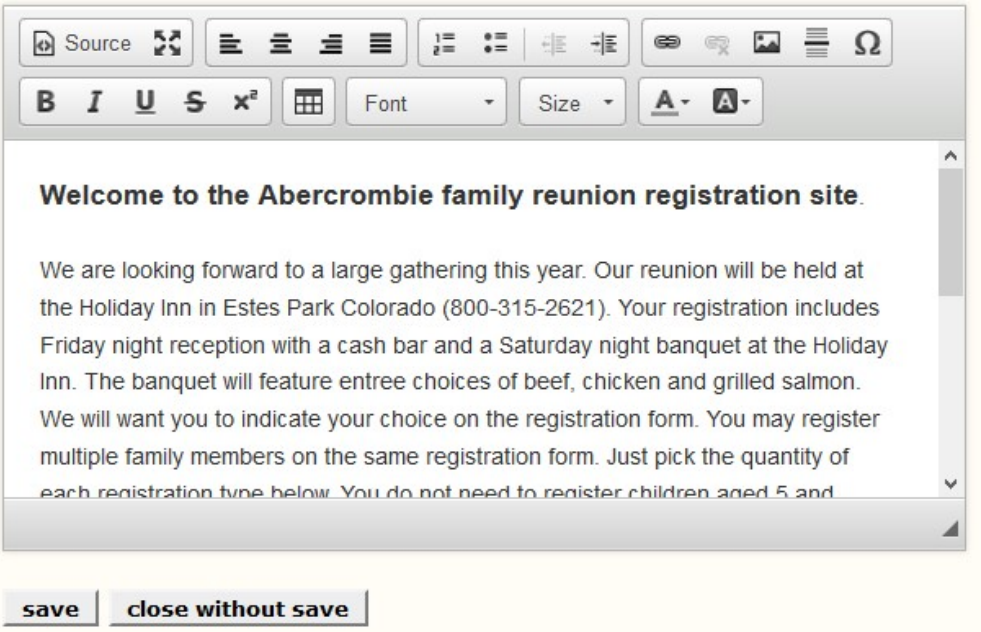
Instructions for registration go here. Move your cursor over this text to edit or hide.

You can also change the color of the font, page or form using the color pickers at the bottom of this page.

When you click the Edit button you will be shown a screen that allows you to replace the dummy text with your own data:



You need to erase the dummy text and insert your own:



When you are done with your text, just click the save button and the text will appear on your form.

For a more in depth look at the mini-editor see [Using the mini-editor]

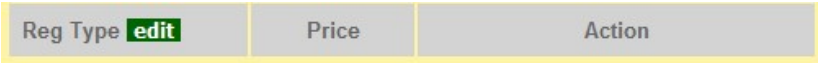
See also

Using the Edit/Hide buttons
Upload image
When box
Where box
Registration type
Setting overall inventory
Event details
Attendee look up
Select or change colors
Preview this page

Registration type

The Registration type (Reg type) box is where you will enter a list (or just one) of categories of attendees. There must be at least one registration type.

You will note that you can change the description for the Reg type columns. If you hover over the Reg type box, you will see an Edit button:



When you click the edit button, you will get this data entry screen:

The caption says 'what are you Selling' and this is relevant when you use the system to sell tickets or items. For

an example, see the Pizza Party explanation below.

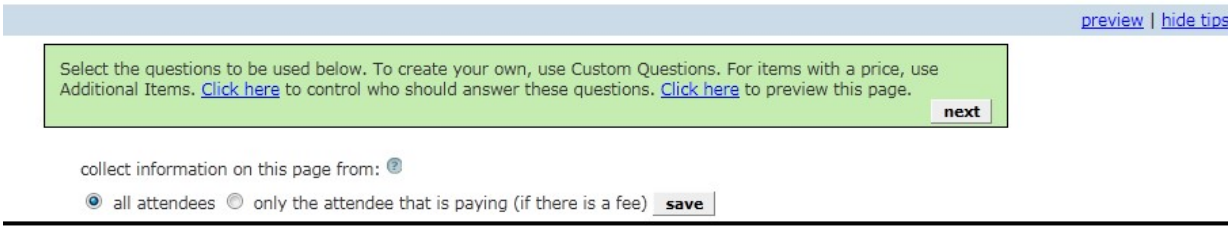
If you are registering people, you will want to just leave the captions as is.

The system has two basic entry formats:

1. I want to register people and I need information on each registrant.

2. I am selling something that does not require me to register individuals. I just need a single contact or person.

When we get to the Edit Questions screen, expose the show hints section and the Click here to control who should answer these questions:

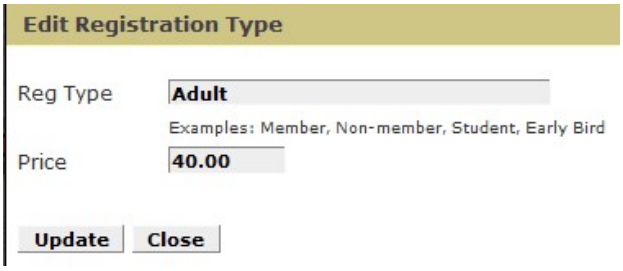


For type 1. registrations, just leave the button (all attendees) selected. If you are doing a type 2. registration form, select the (only attendee that is paying) button.

When using type 1., the program will ask for details for as many people as the attendee indicates on the registration type choice. The best way to understand this distinction is to try the sample registrations - try the Abercrombie Family Reunion for type 1., try the Lincoln School Pizza party for type 2. See Collect info for one registrant only

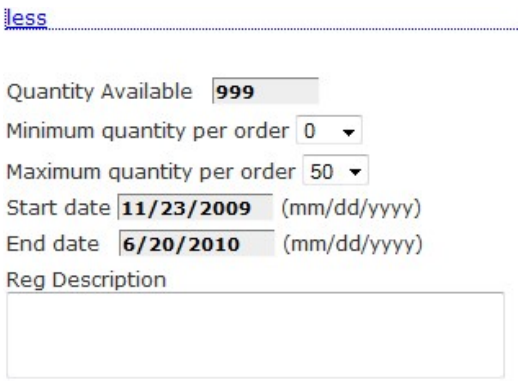
As an example, we will walk through setting up the Abercrombie Family Reunion registration.

In the case of the Reunion, we need to register adults and children. You can enter the first first registration type by just editing the dummy entry and changing the values to reflect your own registration needs:



For our example, we have entered the Adult registration type and entered the price for an Adult.

As on many of the data entry screens used to set up your registration form, the Edit Registration Type has a more link. These links bring up further options, these are the additional options for registration type:



You can indicate a quantity limit if what you are selling has limits; for example, seats to a seminar.

See Setting overall inventory if you have a need for multiple registration types, but require a limit on capacity.

You can also indicate start and end dates for each item. You would use this option if you had a different price for early registrants (Early Bird Rate). The item is only available between the start and end dates shown. Although there is no time field present you can add a time by placing a single space after the date and a single space between the AM/PM designation - like (Date) 4:00 PM

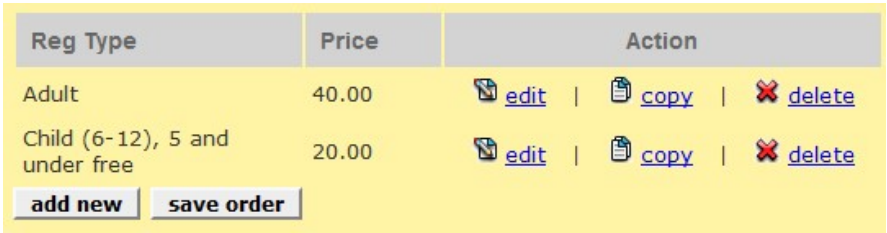
If you want to provide a further explanation of a Reg Type, you can enter the explanation in the Reg Description box. This description will display when your attendee cursors over the symbol adjacent to the reg type.

If you require a minimum quantity or want to impose a maximum that can be ordered, you can set the Minimum and Maximum here.

You can add as many registration types as you wish. Just click the add new button to add another Reg Type.

You can also re order the registration type list. Just click the left button of your mouse and drag the item to a new position. When you are done, click the save order button.

Your new Reg Type list might look like this:



Reg Type	Price	Action
Adult	40.00	edit | copy | delete
Child (6-12), 5 and under free	20.00	edit | copy | delete

add new | save order

This Video, demonstrates a type 1 event. I need to collect data on all attendees and want to enter multiple people on the same registration:

In the case where you are just selling something and do not need to capture attendee details, you would probably want to change the Reg Type column to describe what you are selling. In the case of the Lincoln School Party:

Pizza Slices	Price	Action
Cheese slice	3.00	edit | copy | delete
Sausage or Peperoni slice	5.00	edit | copy | delete
Veggie slice	5.00	edit | copy | delete
Deluxe Slice	6.00	edit | copy | delete

add new | save order

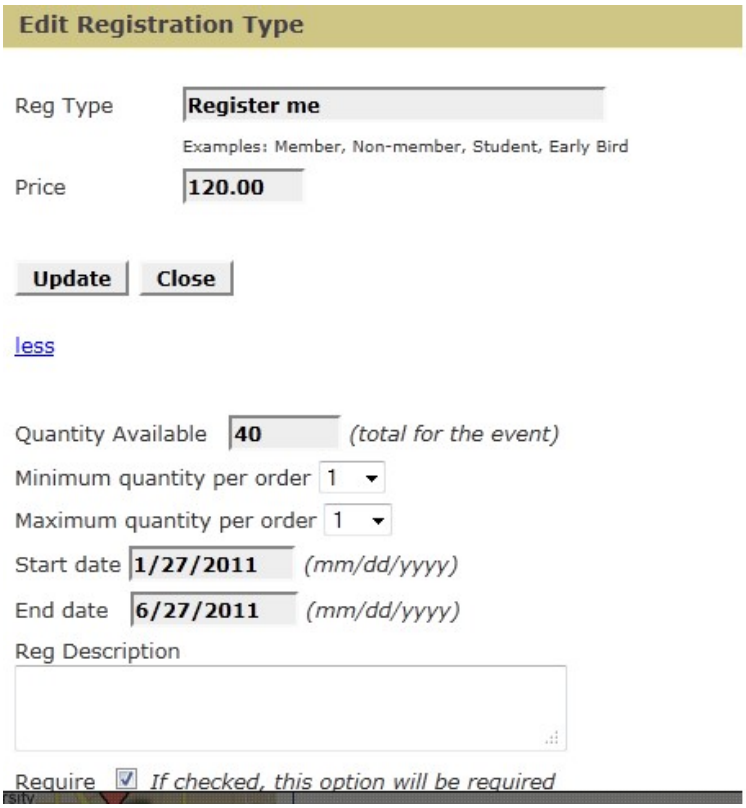
We have changed the Reg Type to Pizza Slices and have added our menu of pizza choices.

If you decide that you no longer wish to offer a registration type, you can always make in 'Not Available' by setting the end date to a past date.

This Video demonstrates a type 2 event, where you are selling items and just need to register the person who is paying for the items:

There are many additional options when setting up your registration types. The Video below, demonstrates an 'Early Bird' pricing scheme, where early registrants enjoy a price break if registering before a certain date:

A common technique when setting up single registration types - i.e. multiple choices are not relevant, is to set up your form so that quantity is defaulted to one and making the choice required:



The above example shows you how to do that. If you allow more than one person to register on the same form, just increase the Maximum quantity per order.

When someone registers, they do not need to select a quantity, just click the continue button to continue on to the next screen.

In addition to registration type basics, you can further enhance the registration area by inserting explanatory text and horizontal lines:

Edit Registration Type

Reg Type **Adult**

Examples: Member, Non-member, Student, Early Bird

Price **40.00**

Update **Close**

less

Quantity Available **50**

Minimum quantity per order 0

Maximum quantity per order 4

Start date *(mm/dd/yyyy)*

*Start date is the date this reg type will **become available.***

End date *(mm/dd/yyyy)*

*End date is the date this reg type will **become NOT available.***

For Start and End dates, if no time is indicated, it will be effective 12:00 AM.

Reg Description

Require ☐ *If checked, this option will be required*

Instead of a reg type, make this a:

☐ line break ☐ horizontal line ☐ misc text

Here is an example using lines and free text:

Registration	Price	Quantity
Symposium $540		
Symposium $615 (After Feb 15, 2014)		
Symposium $665 (After April 15, 2014)		
Symposium $690 (On-site)		
Symposium	$540.00	0
Symposium (After Feb 15, 2014)	$615.00	0
Symposium (After April 15, 2014)	$665.00	0
Symposium (On-site)	$690.00	0
Weekend $480		

See also
Using the Edit/Hide buttons
Upload image
When box
Where box
Registration information
Setting overall inventory
Event details
Attendee look up
Select or change colors
Preview this page

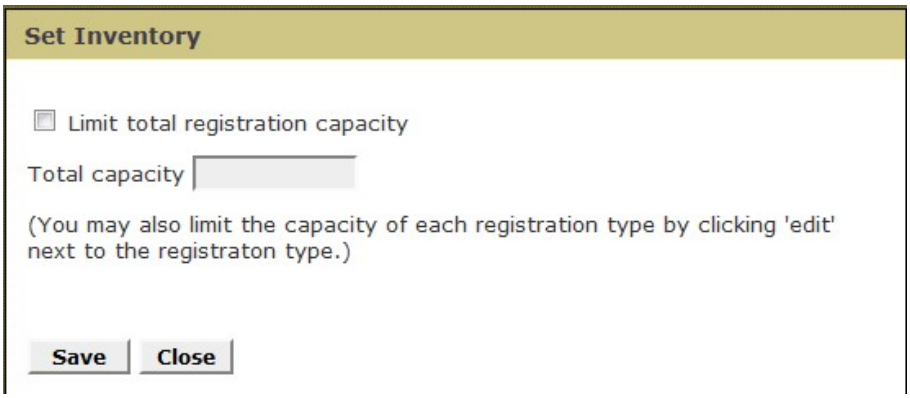
Setting overall inventory

If needed, you may set an overall limit to multiple registration types. An example of when this may be required would be a seminar where your membership could bring a guest, however you wish to limit guests to a pre defined number of seats.

You could set an overall limit of - for example 100 seats - the capacity of your facility, but wish to limit guests to only 20 seats.

You access the overall inventory by click on the inventory button:

When you cllick the button you will see this dialogue:



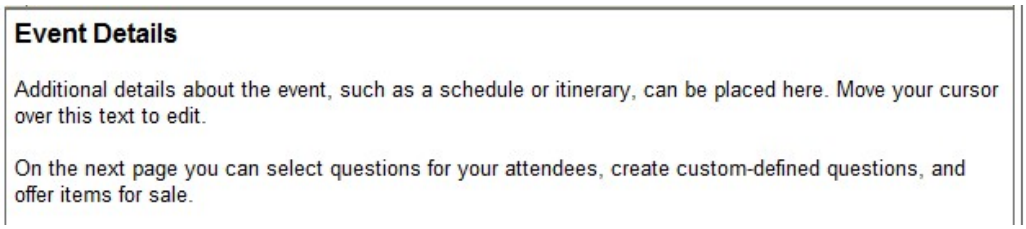
You may enter the total capacity for all registration types.

Note that you can still limit individual registration types and the individual quantities can exceed the total capacity, but the system will not allow you to exceed the total capacity. You must also click / turn on the check box that says Limit total registration capacity.

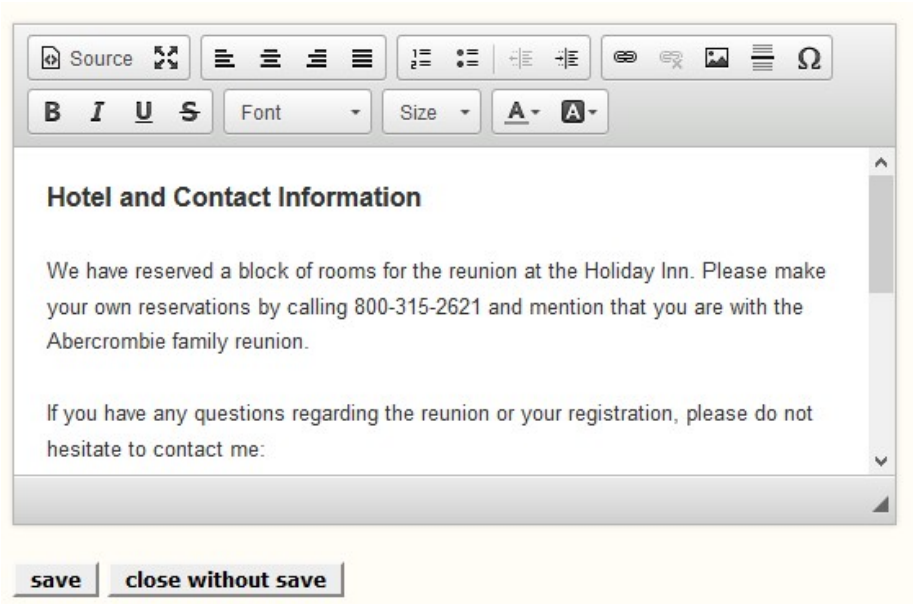
See also
Using the Edit/Hide buttons
Upload image
When box
Where box

Event details

The Event Details area of the main form provides an additional area to describe your event. It is initially filled with dummy text:



When you select the Edit button, you can replace the dummy text with your own event details:



Of course, if you have no further Event Details, i.e. you have explained your event in the Registration Information section, you can just Hide the Event Details.

If you need to include additional forms, such as permission slips, health forms, handbooks, etc., they can be added to this section - see Upload files in the Manage section.

See also
Using the Edit/Hide buttons
Upload image
When box
Where box
Registration information
Registration type
Setting overall inventory
Attendee look up
Select or change colors
Preview this page

Attendee look up

Your attendees can return to your registration page at any time to look up their own registrations:

What they will see is a review of all registration items. The review page will also have a button which can be used to re-send their confirmation email.

The attendee cannot change any data in their registration, but you can change some of the items. See Manage event help section for details.

If you do want to provide the look up facility, you can simply Hide this section.

See also

Using the Edit/Hide buttons
Upload image
When box
Where box
Registration information
Registration type
Setting overall inventory
Event details
Select or change colors
Preview this page

Select or change colors

At the top of the Setup/ Layout form, there is a link that you can use to change the colors of your form:

When you click the edit colors link you will be shown this palatte:

The color palette can be selected by clicking on box which contains the current color values.

The items you can change:

Form: This is the primary area of the registration form.
Border: The border of the registration form.
Page: The background area (i.e. the area outside the form).
Font: The font colors used in the form.

Note that when you edit the text areas, such as Registration Information and Event Details, the text editor also allows you to change those font colors independently.

You change the color by relocating the crosshair symbol to a new area on the color chart or by moving the slider on the right.

You can test different colors. When you decide that you have the colors you want, just click the Save Colors button. If you decide that your colors are not what you want - do not Save Colors and the form will retain the original color scheme.

See also
Using the Edit/Hide buttons
Upload image
When box
Where box
Registration information
Registration type
Setting overall inventory
Event details
Attendee look up
Preview this page

Home > Edit Layout > Preview this page

Preview this page

At any time during your definition, you can choose to preview your work by clicking the Preview link:

There is a Preview link on the Layout page and the Questions page.

The page will be rendered just as it would look to an attendee registering for your event.

To exit the preview, just click anywhere on the background of your edit screen. The Preview will close.

[redacted]

See also

Using the Edit/Hide buttons
Upload image
When box
Where box
Registration information
Registration type
Setting overall inventory
Event details
Attendee look up
Select or change colors

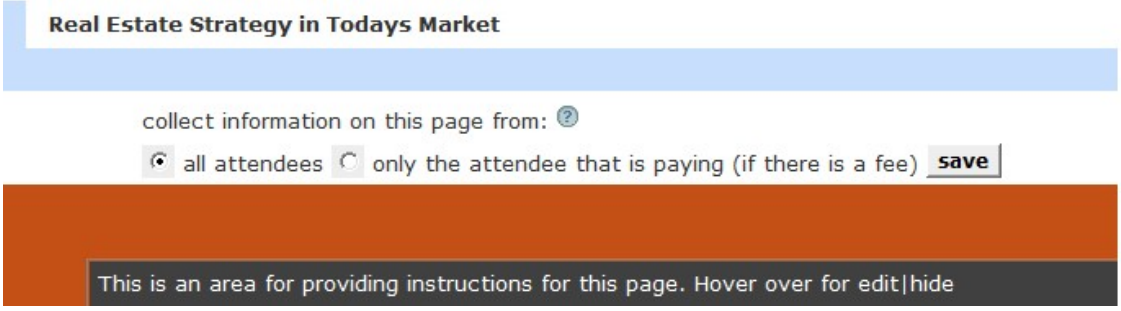
Collect info for one registrant only

The system has two basic entry formats:

1. I want to register people and I need information on each registrant.

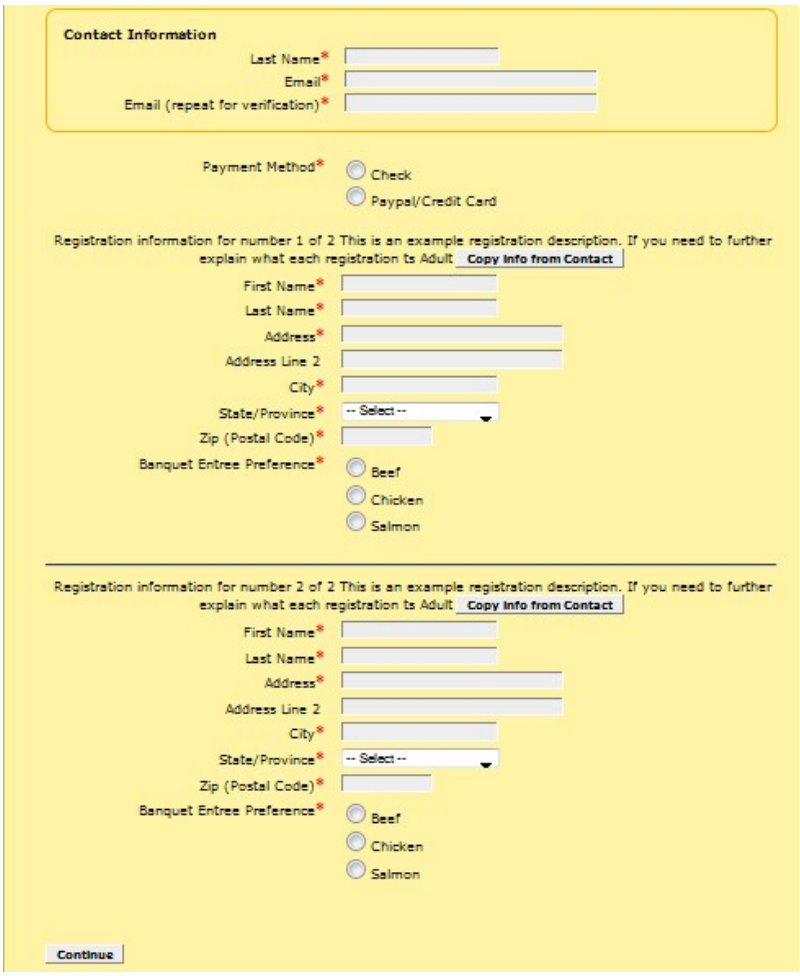
2. I am selling something that does not require me to register individuals. I just need a single contact or person.

On the Questions screen, you will see this question at the top of the screen:



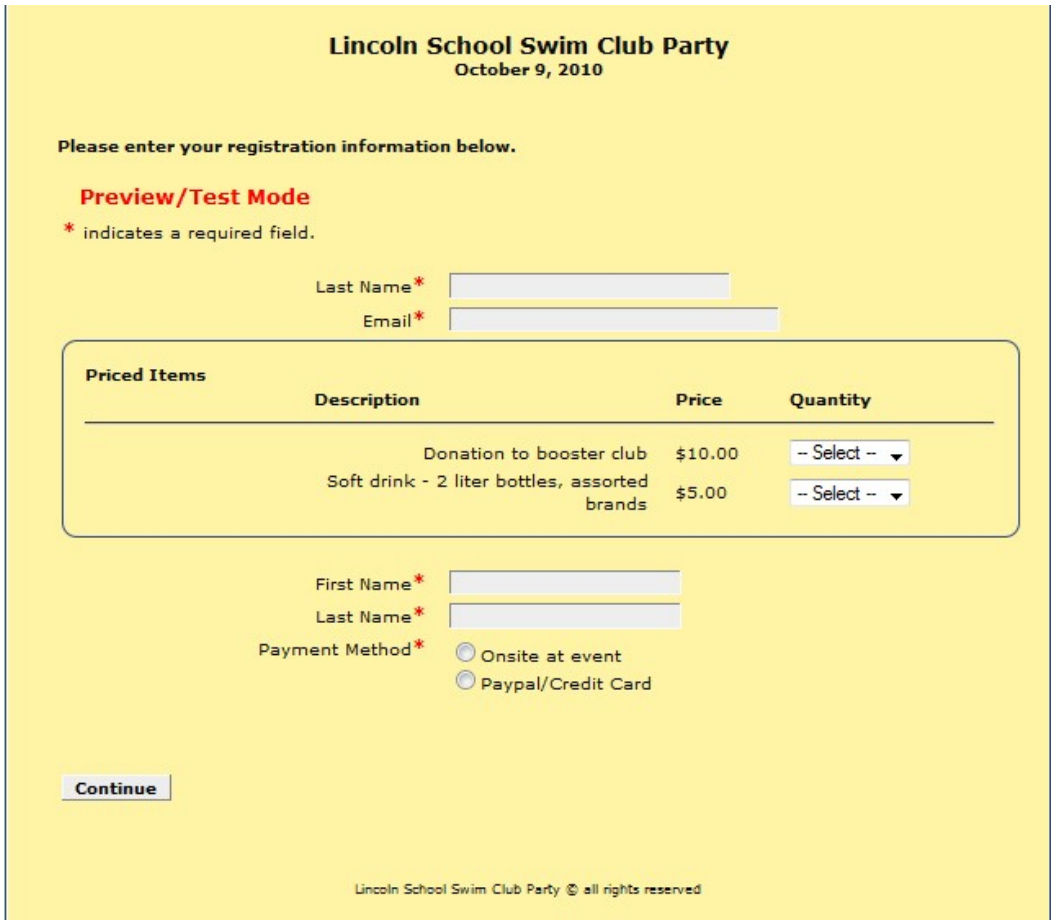
For type 1. registrations, just leave the button (all attendees) selected. If you are doing a type 2. registration form, select the (only attendee that is paying) button.

When using type 1., the program will ask for details for as many people as the attendee indicates on the registration type choice as shown in the Abercrombie Family Reunion:



In this example, the attendee has chosen to register 2 adults, so they will expect to enter data for 2 attendees.

In the case of the Lincoln School party, we don't need details on attendees, we are just selling party food and asking for donations:



One way to understand this distinction is to try the sample registrations yourself - try the Abercrombie Family Reunion for type 1. and the Lincoln School Pizza party for type 2.

Another way to understand this concept is to look at your registration types. For example, the Lincoln School:

Pizza Slices	Price	Quantity
Cheese Slice	$3.00	-- Select --
Sausage or Pepperoni Slice	$5.00	-- Select --
Veggie Slice	$5.00	-- Select --
Deluxe Slice	$6.00	-- Select --

If I were to collect standard questions for each choice and someone bought 5 Veggie slices, the system would ask for 5 names, if I was collecting data from All attendees. Obviously not an appropriate choice.

In the example of the Abercrombie reunion:

Reg Type	Price	Quantity
Adult	$40.00	-- Select --
Child (6-12), 5 and under free	$20.00	-- Select --

I definitely want to collect data from all attendees. So if 2 adults and 1 child are registering, I want to collect data

regarding all 3 attendees.

If you want to sell a lot of disparate item (i.e. the pizza slice example), but still collect data for each individual attendee, then set up the items as additional items on the Questions screen. Change the Registration type choice to just one - for example just **registration**. The individual items can then be sold on the questions page, just like the soda and contribution items:

The video below, demonstrates the differences between these two basic registration methods:

See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Using the mini-editor
Edit General section
Edit Layout

Edit Questions
Edit Text and Email
Edit Survey
Edit Extras
Event Home- Manage
Other Management tasks
FAQ

Articles in this section

The following table will give you a guide as to when to use which type of question format on the Questions page:

Need Answer for each registrant	Need Price	Need Inventory	Use
NO	YES	YES	Additional Items
NO	YES	NO	Additional Items
NO	NO	YES	Additional Items
YES	NO	NO	Custom Question
YES	YES	NO	Sessions
YES	NO	YES	Sessions
YES	YES	YES	Sessions

Standard questions
Custom questions
Sessions
Additional (Priced) items
Waiver presentation
Preview page
Using Int'l State/County
Disabling a question, additional item or Session
Using the email standard question

See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Using the mini-editor
Edit General section
Edit Layout
Collect info for one registrant only
Edit Text and Email
Edit Survey
Edit Extras
Event Home- Manage
Other Management tasks
FAQ

Standard questions

This page begins with a list of Standard Questions which are most likely to be needed from your attendees.

We have already addressed the two basic registration modes.

See Collect info for one registrant only to see how to condition your quesions.

For the example we are following (Abercrombie Family Reunion), we will want to keep the default choice. We need to capture details on all attendees.

The Standard Questions look like this:

save question changes

Standard Questions	Action	Use	Require
Salutation	edit	☐	☐
First Name	edit	☑	☑
Last Name	edit	☑	☑

A Standard Question can be used or skipped. To use the question, make sure the Use box is checked. If you wish to Require the entry of that data field, make sure the Require box is checked.

You can also edit the Standard Question by clicking the edit choice next to the Question. You will get this screen:

Standard Field

First Name

☑ use ☑ require ☐ apply only to 'Lead' registrant

save close

less

text on right side:

Again, we have clicked the more link to see all of the possible options. You can change the actual name of the field if you like - this again, would be handy to present the form in another language. First Name in German would become Vorname.

Note - do not use standard questions in lieu of Custom Questions (Custom questions). Most of the Standard Questions have limited field sizes and field types as well as differing functionality. Use custom questions if the question is not covered in the Standard Questions.

Here is a list of standard questions - please note that some standard questions should not be altered as regards their function. I.e. you can change their name but do not expect the function to be changed. The standard questions shown in red have a 'hard coded' function. You can move them around via drag and drop but First Name will be First Name, regardless of what you call it.

Salutation
First Name
Last Name
Title
Nick Name
Work Phone
Email
Email repeat
Address
Address Line 2
Address Line 3
City
State/Province
Country
Zip (Postal Code)
Company/Organization
Home Phone
Mobile Phone
Fax Number
Member ID
Customer ID
Age

Birth Date
Gender
Int'l State/Country

You can also enter text that would show on the right side of the standard question entry.

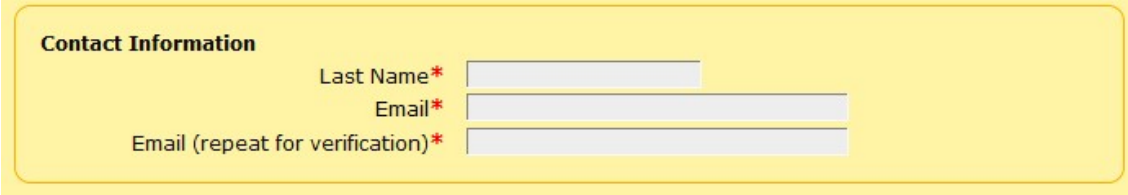
You can change the order of the standard questions. Just hold down the left button on your mouse and drag the question to a new position.

If you want a standard question to apply to the first registrant only, click the check box next to that request. You might use this where the first registrant will provide the main demographic data, like address, etc. but subsequent entries do not need that information. One side effect of this option is that the downloaded data for non-lead registrants will not contain data that is entered for the lead only. Note that this feature is only relevant when you have a registration with more than ONE person entered on the same registration.

An obvious use for this feature is when selling or registering 'tables' of people. I.e. when buying a 'table of 8', the only thing you may require of the second and subsequent entries is the name and organization of the registrants.

A note about collecting email addresses

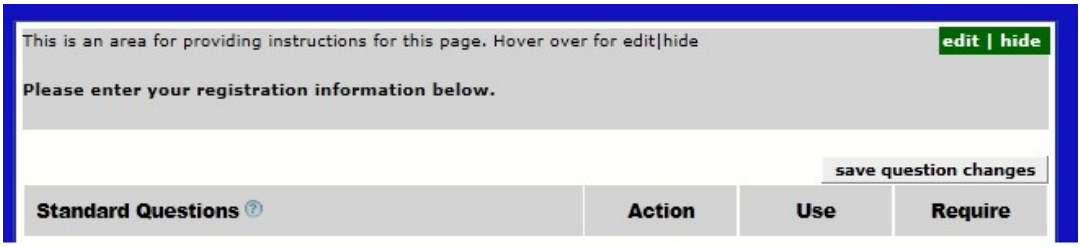
An email address is **required** for every registration. You do not have to use the email address field in Standard questions, however if you do not use it, a Contact box will be presented which will require an email address:



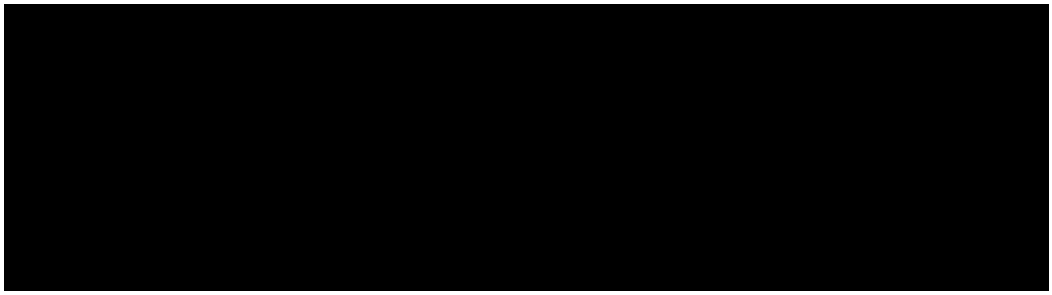
So, even if you collect NO data from the standard questions, the email address and last name fields will be requested.

It is not uncommon to change the description of a standard question to collect a piece of data that is not included in the standard question.

There is an additional text area at the top of the Questions page:



You can use this area for further instructions at the top of your questions.

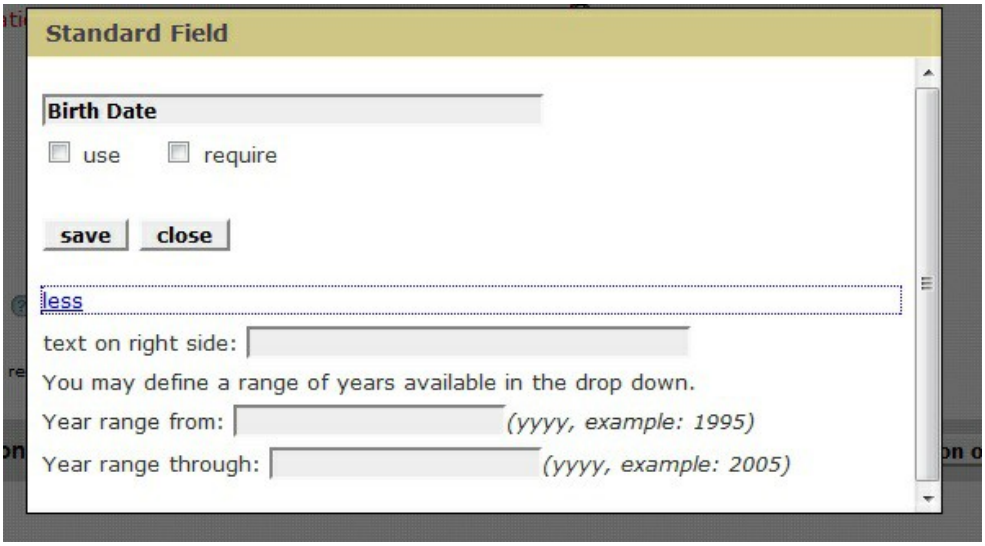


See also

Custom questions
Sessions
Additional (Priced) items
Waiver presentation
Preview page
Using Int'l State/County
Disabling a question, additional item or Session
Using the email standard question

Birth date range

If you select the edit link adjacent to Birth Date, you will be offered the option to set a range of valid birth dates (by year):



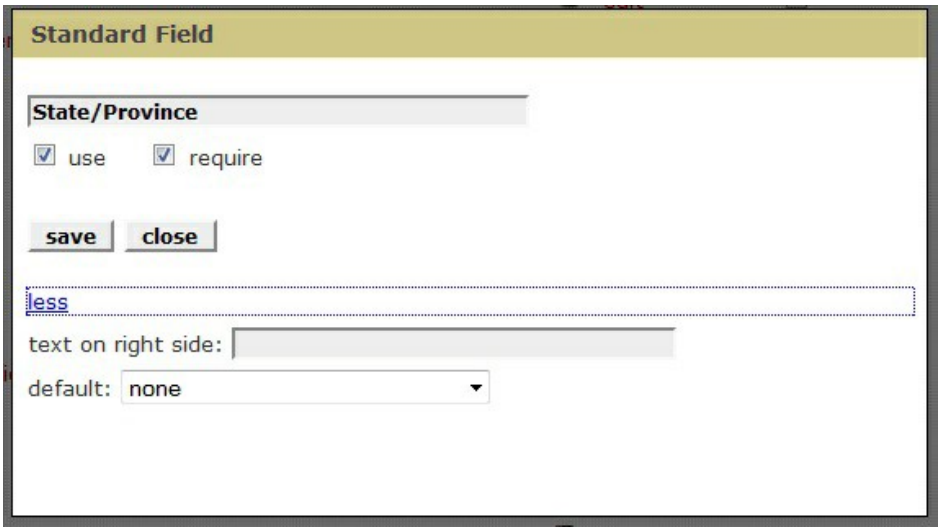
You can use this feature to limit the valid age of registrants. This would be useful for registering youth, where an age range is required for participation.

See also

Default State/Province
Default country

Default State/Province

If you select the Edit link adjacent to the standard field State/Province, you will have an option to set a default State/ Province:



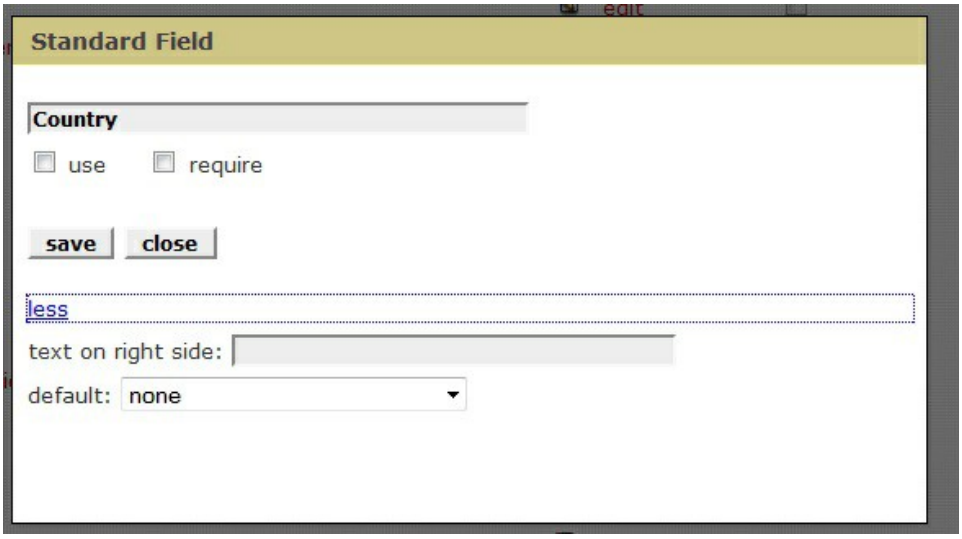
This default does not prohibit the choice of State/ Province, it just pre populates the question with a default choice.

See also

Birth date range
Default country

Default country

If you choose the edit button adjacent to the standard question Country, you will have an option to set a default country:



The default drop down will establish a default country. This still allows a registrant to choose a different country, but will pre populate the question with a default.

See also
Birth date range
Default State/Province

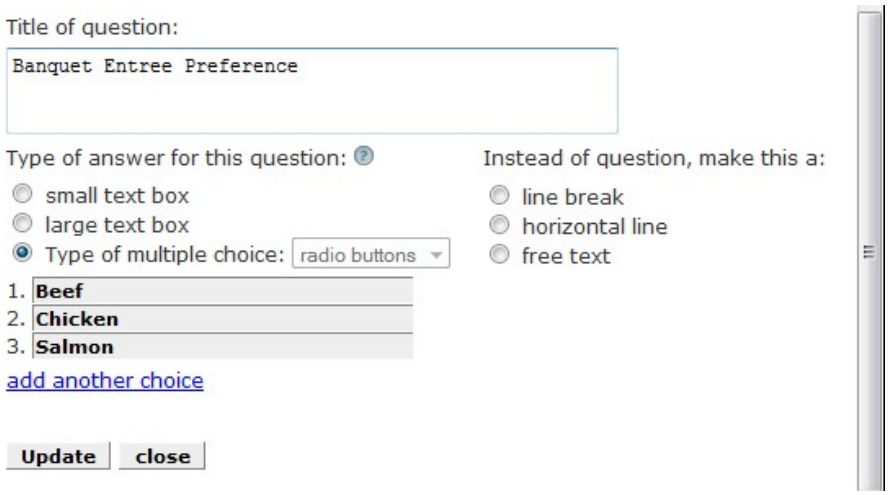
Home > Edit Questions > Custom questions

Custom questions

In addition to the Standard Questions, you can define your own questions.

The Custom Questions section looks like this:

To initiate a Custom Question, click the add custom question box:

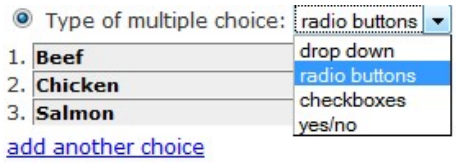


You need to enter a title for the question. In addition, you must indicate how to handle the answers to your question.

Each of the choices are explained below:

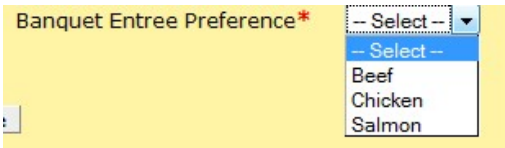
- Small Text box; a one line text entry - up to 100 characters.
- Large Text box; multiple line entry - up to 1000 characters.
- Multiple choice box; use where you want to ask for specific values.
- Line break; inserts an extra blank line.
- Horizontal line; inserts a horizontal line on the form.
- Free text; inserts additional explanatory text at this point on the form.

The multiple choice box has several choices which appear in a drop down box:

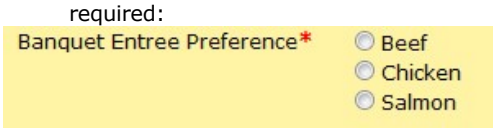


The choices are:

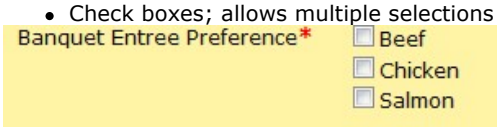
- Drop down; allows only one choice. Looks just like the drop down that is presented when you select Type of multiple choice. You would use this if you had a large number of choices. The amount of screen space used is quite small and lends itself to a larger list of options.



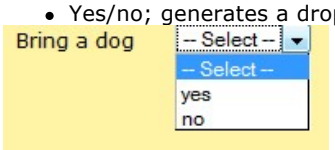
- Radio buttons; allows only one choice. Attendee must click least one button if this field is marked as required:



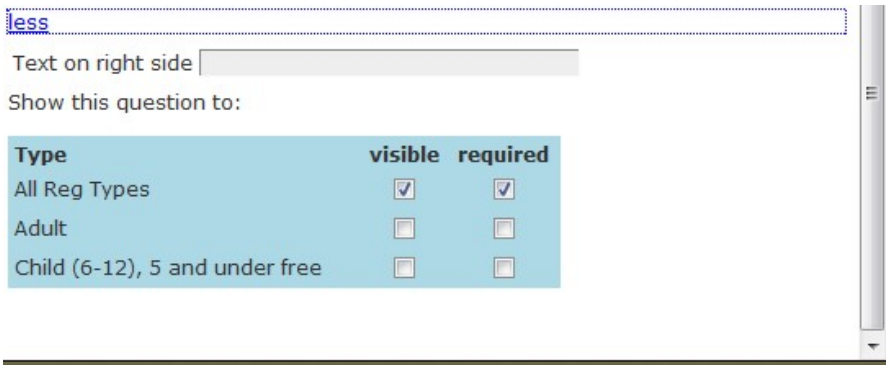
- Check boxes; allows multiple selections (or none):



- Yes/no; generates a drop down box with Yes/ No pre-populated:



As in many of the data entry screens, the Custom Questions entry has a more link. When you click the more link, you will see this additional information:



This additional set of options allows you to condition your custom question. You can either show it or not show it based on the type of registration. If visible is checked, the question will be shown. If you click the required box, attendees must answer the question.

You can also enter additional text that will be shown on the right side of the Custom Question.

You can change the order of the Custom questions. Just hold down the left button on your mouse and drag the question to a new position.

A special note on changing your Custom questions.

If you want to change the type of answer to a custom question in any way, you cannot have any registrations present.

If you have registrations and they are all in Preview/ Test mode, just delete them and you can make changes.

If you have registered attendees already, you can Disable the existing question and construct a new question the way you want/ need it.

The video below demonstrates a complex set of custom questions and gives you an excellent idea of how flexible the feature can be:

See also

Standard questions
Sessions
Additional (Priced) items
Waiver presentation
Preview page
Using Int'l State/County
Disabling a question, additional item or Session
Using the email standard question

Sessions

Sessions are designed for users who need to provide a list of registration options that will be applied to (or asked of) each registrant.

Sessions may be priced and can have inventory.

Sessions add session save session order

Text	Type	Priced	Capacity Controlled	Action
	line			edit copy disable dele
The first morning session will be from 9:10AM to 10:50AM, Session two will be from 11:00AM to 12:30PM, Session three will be from 1:00PM to 2:30PM	misc text			edit copy disable dele
Session 1 - 9:10 to 10:50	radio buttons	no	yes	edit copy disable dele
	line			edit copy disable dele
Session 2 - 11:00 to 12:30	radio buttons	no	yes	edit copy disable dele
	line			edit copy disable dele
Session 3 - 1:00 to 2:30	radio buttons	no	yes	edit copy disable dele
	line			edit copy disable dele

The above example shows three sessions which are distinguished by the time of each session. The session details can be examined by editing an existing session:

Edit Session

Title of session:

Session 1 - 9:10 to 10:50

Display session options as:

- drop down
- radio button

Instead of session, make this a:

- line break
- horizontal line
- free text

Session Option	Capacity	Price
1. Camping 9:10-10:50	12	0
2. Citizenship in the Community 9:10-10:50	12	0
3. Citizenship in the Nation 9:10-10:50	12	0
4. Citizenship in the World 9:10-10:50	12	0
5. Collections 9:10-10:50 (Please indicate collec	12	0
6. Cooking 9:10-10:50	12	0
7. Electricity 9:10-10:50	12	0
8. Emergency Preparedness 9:10-10:50	12	0

Sessions can be shown to specific registration types if needed:

Edit Session

12.	Geology 9:10-10:50	12	0
13.	Traffic Safety 9:10-10:50	12	0

add another option

update | close

less

Text on right side

Show this question to:

Type	visible	required
All Reg Types	☐	☐
Scout Master Specific - Adult Training Session	☐	☐
Venture Leader Specific - Adult Training Session	☐	☐
Varsity Leader Specific - Adult Training Session	☐	☐
Youth Protection - Adult Training Session	☐	☐
Scout	☑	☐

In the example above, sessions for this merit badge clinic are shown to registrants identified as Scouts, but not to Adult leaders.

When the sessions are displayed on the registration form, they will look like this - using the above example:

The first morning session will be from 9:10AM to 10:50AM, Session two will be from 11:00AM to 12:30PM, Session three will be from 1:00PM to 2:30PM

Session 1 - 9:10 to 10:50

- Camping 9:10-10:50
- Citizenship in the Community 9:10-10:50
- Citizenship in the Nation 9:10-10:50
- Citizenship in the World 9:10-10:50
- Collections 9:10-10:50 (Please indicate collection above)
- Cooking 9:10-10:50
- Electricity 9:10-10:50
- Emergency Preparedness 9:10-10:50
- Family Life 9:10-10:50
- Finger Printing 9:10-10:50
- Geneology 9:10-10:50
- Geology 9:10-10:50
- Traffic Safety 9:10-10:50

Session 2 - 11:00 to 12:30

- Camping 11:00-12:30
- Citizenship in the Community 11:00-12:30
- Citizenship in the Nation 11:00-12:30
- Citizenship in the World 11:00-12:30

These sessions are set up using radio buttons - only one option can be selected for each session.

You may also use checkboxes on sessions, but there can still be only one option checked. Checkboxes would be appropriate if want to allow the registrant to 'uncheck' a session. With radio buttons, the only way to accomplish that is to offer a None or No option for someone who changes their mind.

For very long lists of sessions, a drop down list may work better. Drop down lists allow only a **single session** to be chosen - if you want the registrant to be able to 'uncheck' a session in a drop down, you would need to offer a None or No choice.

If a session element is full, it will be greyed out or shown as 'Not Available' in the case of a drop down presentation.

Sessions are NOT compatible with the option to collect data for the payee only:

collect information on this page from:

all attendees only the attendee that is paying (if there is a fee) save

I.e. **all attendees** must be selected (that is the normal default).

Even though the description of this option is "Sessions", it can be useful for additional registration issues, specifically where you need to ask for priced items on a per person basis.

An example might be a medical meeting where you will be providing various tests to attendees for a fee.

In this example, we want the registrants - individually - to select their (optional) health screening tests:

Super Panel -	25.00
Prostate Specific AG, Serum	15.00
Thyroid stimulating hormone	15.00
Prothrombin Time	12.00
NMR LipoProfile	55.00
Lyme Ab, Total/IgM Responses	60.00

We can set each test up as a separate 'session':

Sessions add session save session order

Text	Type	Priced	Capacity Controlled	Action
	line			edit copy disable delet
Please indicate the health screening tests that you would like to participate in	misc text			edit copy disable delet
	radio buttons	yes	no	edit copy disable delet
	radio buttons	yes	no	edit copy disable delet
	radio buttons	yes	no	edit copy disable delet
	radio buttons	yes	no	edit copy disable delet
	radio buttons	yes	yes	edit copy disable delet
	radio buttons	yes	no	edit copy disable delet
	line			edit copy disable delet

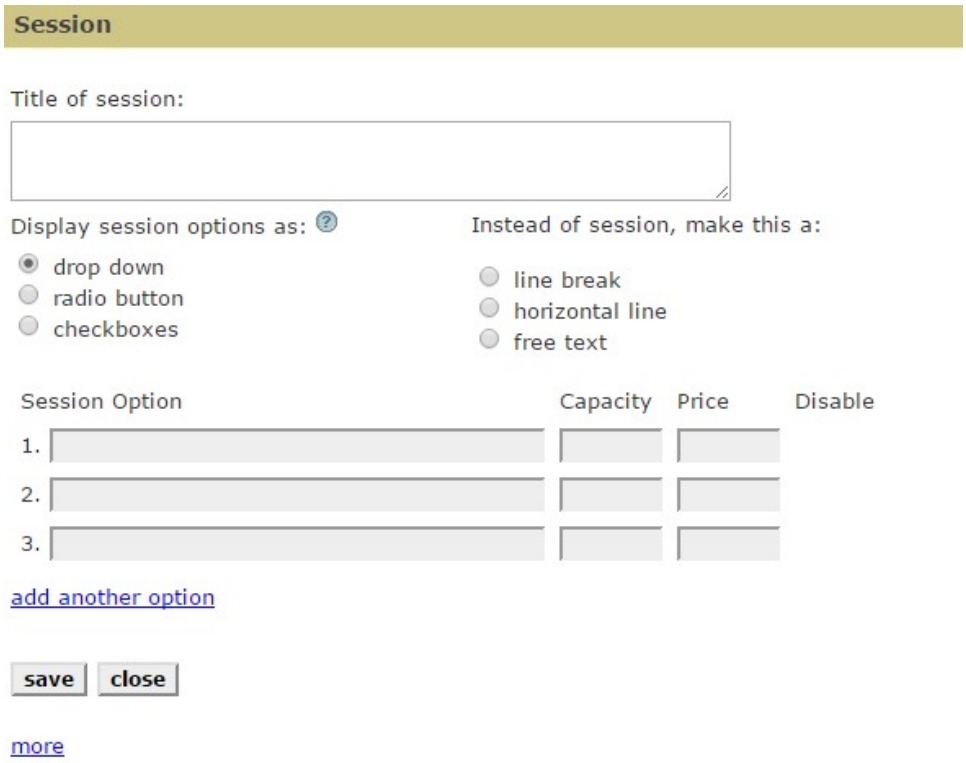
There is a single entry (session) for each item. When the items are displayed on the registration form, they will look like this:

Please indicate the health screening tests that you would like to participate in

- Super Panel ($25.00)
- Thyroid Stimulating Hormone ($15.00)
- Prostate Specific Ag, Serum ($18.00)
- Prothombrin Time ($12.00)
- NMR LipoProfile ($55.00)
- Lyme Ab, Total/IgM Responses ($60.00)

And - they will be asked for each registrant. The alternative, using Additional items would not ask for items by individual registrant.

We have recently added the ability to use check boxes for session choices. This means that a session may contain items where the registrant can choose multiple items:



This method works just like radio button session choices, except that the registrant can choose multiples.

See also

Standard questions
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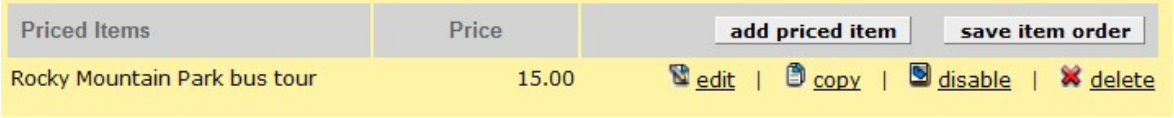
Using the email standard question

Home > Edit Questions > Additional (Priced) items

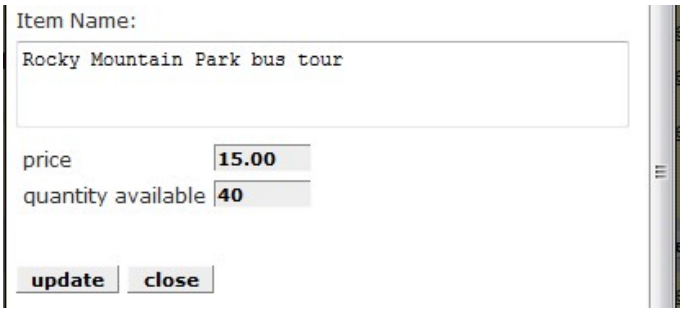
Additional (Priced) items

Priced items are used to add additional options to your event that have a monetary value.

The Priced Items display looks like this:

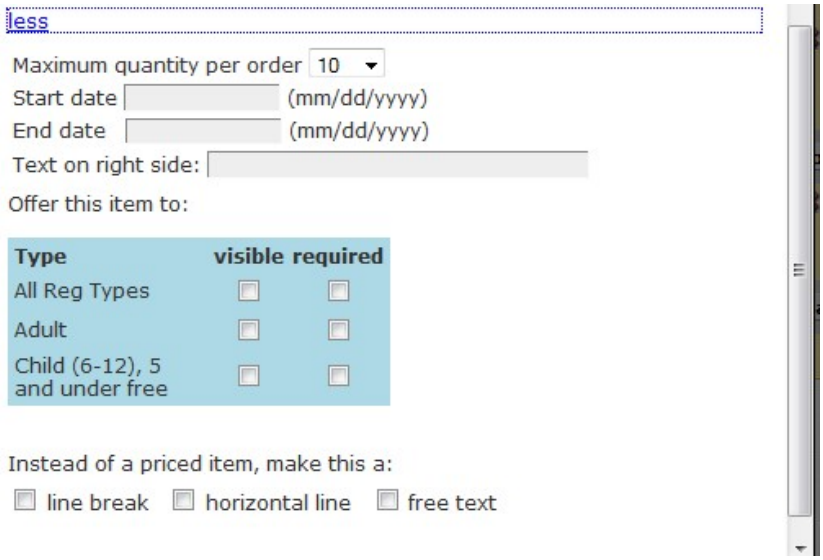


To add a priced item, click the add priced item box:



You can describe the item and enter the price. If the item has a limited supply, you can specify the maximum quantity available.

As on most data entry screens, there is a more link that will expose further options:



You can specify a maximum quantity per order. You can also specify a date range that this item will be available. You might do this for items that require some lead time before your event, such as T-shirts that need to be prepared in advance of the event. You could specify the last date that these items can be ordered and they would show as not available after that date.

You can also specify which registration types (if more than one) should see this item and/or whether the item is required.

You can change the order of the Additional items. Just hold down the left button on your mouse and drag the item to a new position.

As in Custom Questions, you can specify that this entry should be a line break (extra blank line), horizontal line (a line on the form) or free text if you wish to further explain a following item.

You should also review Sessions. Sessions will be applied to each individual registration, whereas Additional Items are asked only once per checkout - i.e. if two people register on the same registration, only one set of additional items are requested. In the case of sessions, session choices are asked of EACH registrant in the case of multiple people registering. Sessions may be priced and may have an inventory.

See also

Standard questions
Custom questions
Sessions
Waiver presentation
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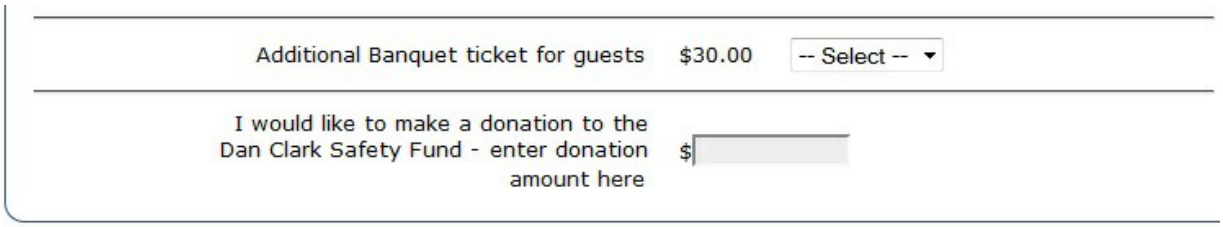
Disabling a question, additional item or Session
Using the email standard question

Donation request

Additional (Priced) items also have a donation format check box that is exposed when you click the more link.

When you click (select) the Donation format check box, your registration form will have a donation field, where registrants can enter any amount they wish (or not enter anything). An example of how this might look on your form:



See also

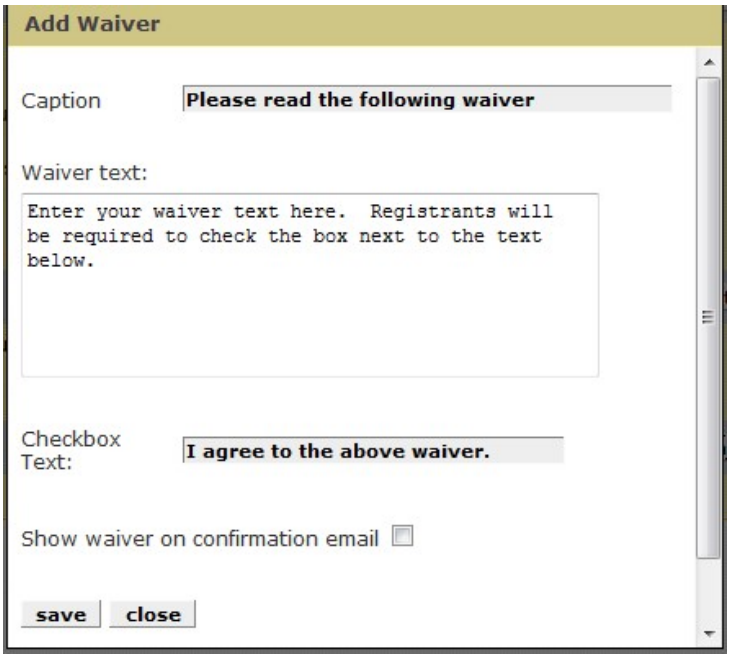
Waiver presentation

For some athletic, school, scouting and church events there may be a legal form required for all participants/ attendees called a waiver.

The Waiver usually involves an outline of the organizers responsibility and the participants willingness to limit their recourse should physical harm result as part of the event.

There is a special item designed for the Waiver. The waiver entry looks like this:

When you click the add waiver:



You can enter the waiver text - usually a copy and paste from your own waiver document.

You can specify the checkbox text - once a waiver is added to your form, the attendee must agree to it by clicking on the checkbox before continuing. If your form is collecting data form multiple attendees, each attendee must check the box.

If your waiver is in a word processing document - like MS Word - be sure to copy it and paste it into a Notepad document or similar text editor that strips all of the Word formatting. Otherwise your waiver will have lots of unreadable codes in it.

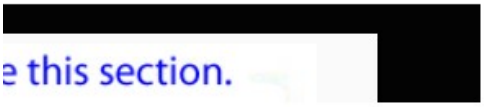
If you require that the waiver also be shown on the attendees confirmation, click that box.

See also

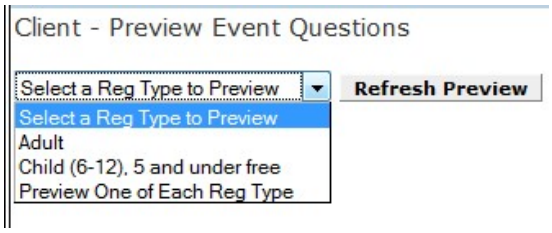
Standard questions
Custom questions
Sessions
Additional (Priced) items
Preview page
Using Int'l State/County
Disabling a question, additional item or Session
Using the email standard question

Preview page

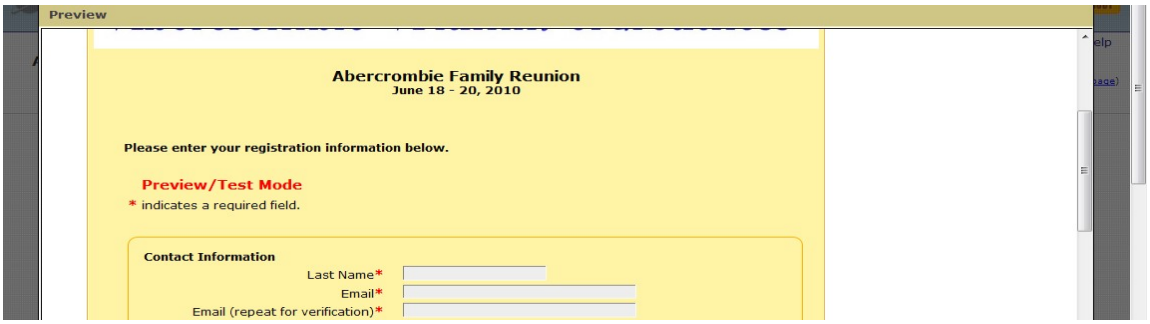
At any point in your definition of your event you can choose to display a preview of that page by clicking:



When you preview the Questions page and you have defined registration types, you will have an opportunity to select a registration type to preview:



As soon as you make a selection, click the Refresh Preview button to see what your attendees will see.



To exit from the preview mode, click on any area outside the previewed screen (shown as gray above).

See also

Standard questions
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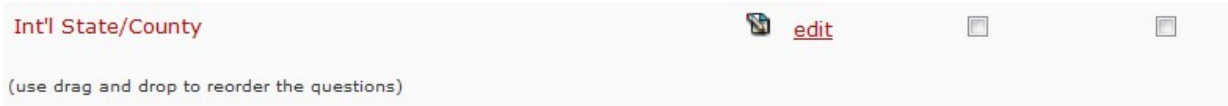
Waiver presentation
Using Int'l State/County
Disabling a question, additional item or Session
Using the email standard question

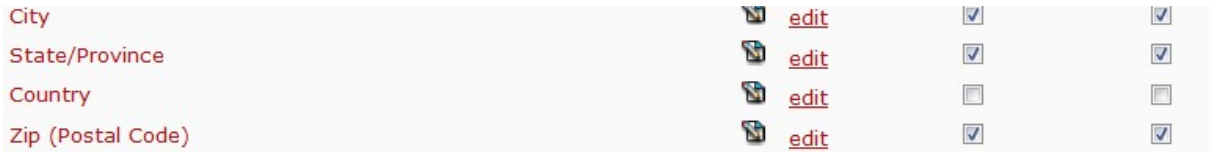
Using Int'l State/County

You will notice that there is a standard field labeled Int'l State/County in the standard questions:



This field is there for attendees that register from outside the United States, Canada and US territories.

There is no pre-defined list of values like there is for the US.



The State/Province field is a drop down with all of the US States, territories and the Canadian provinces.

If your attendees will be registering from outside the United States as well as within the United States, you can use both fields:

In the example above, the field descriptions have been changed using the edit link on each line.

When your attendees see this on their registration forms, it will look like this:

Note that neither field is marked as required, so US registrants can pick their appropriate states, while registrants outside the US can enter text if they wish to indicate their local province, state or county.

See also

Standard questions
Custom questions
Sessions
Additional (Priced) items
Waiver presentation
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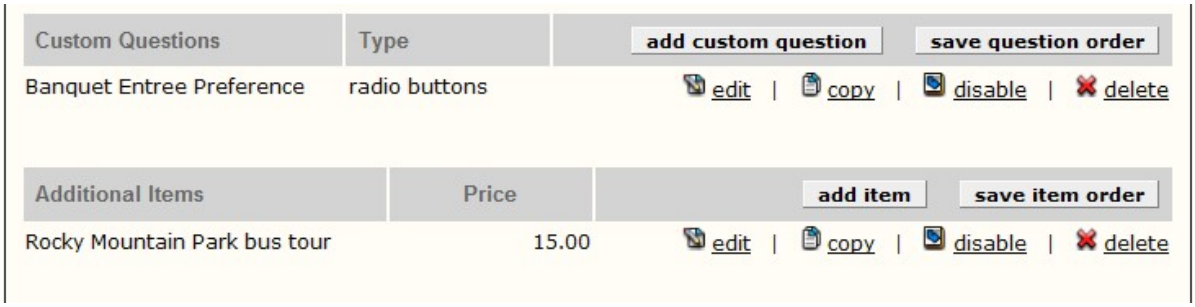
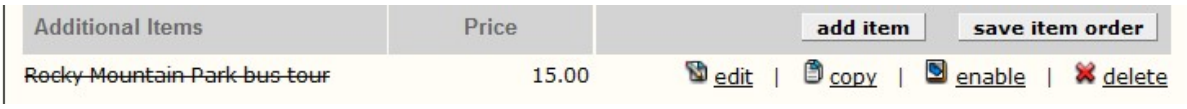
Disabling a question, additional item or Session
Using the email standard question

Disabling a question, additional item or Session

On the Standard questions page, you will notice that there is a Disable choice for both additional items and custom questions:



When you select this option, you will notice that the item still appears on the definition screen, but is lined out:



Why disable and not delete? If you have not entered any registrations, then delete is more appropriate than disable. However if you have registered attendees and, for any reason, do not wish to offer the item or question to future attendees, you can disable the question/ item without effecting registrations that already exist.

The general rule then: No registrations yet, use delete, already have registrations but no longer need or want the item, use disable.

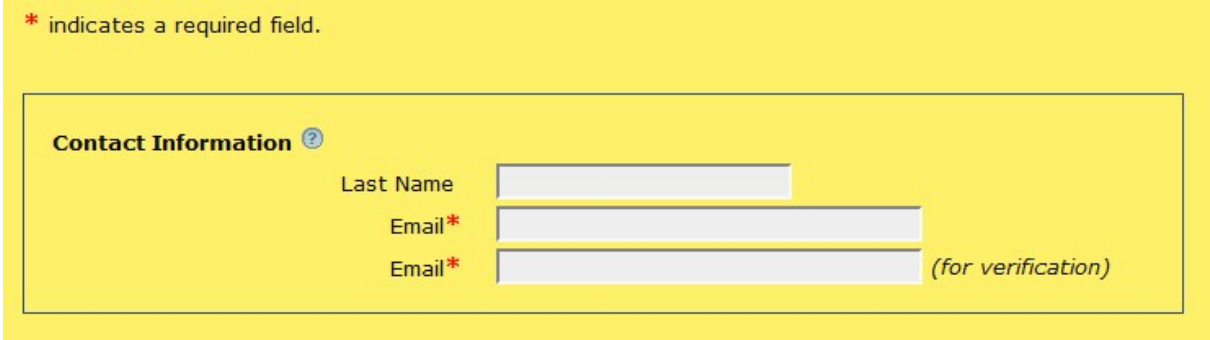
See also

Standard questions
Custom questions
Sessions
Additional (Priced) items
Waiver presentation
Preview page
Using Int'l State/County
Using the email standard question

Using the email standard question

If you do not use the Email standard question:

The system will create a Contact box which requires Email:



It is not possible to to use the system without collecting an email address.

If you do require the Email address in Standard Questions, there will not be a Contact box.

When your registrant completes a registration and is presented with a Review page to verify and/or edit information, a Contact box is always shown - regardless of the use of the Standard question for Email.

The concept of 'Contact' is important because that is the email address used to send a confirmation - even if multiple registrants are present with different email addresses - only the first email entered will be sent a confirmation.

On the review page, the contact box may be edited to change that imputed email and may be any valid email address, including an email address not present in the registration.

See also

Standard questions
Custom questions
Sessions
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Waiver presentation
Preview page
Using Int'l State/County
Disabling a question, additional item or Session

Edit Text and Email

There are several sections on this page:

Customize the review page - this is the page that the registrant sees right before they click the Register button. If you have additional instructions before registering, they can go here. The text you see will be shown.

Customize the confirmation page - this is the page that the registrant will see AFTER they register. There is a link at the bottom of this section where you can redirect your registrant back to your web site. Click the confirmation page extras to see this area.

Customize the confirmation email - you can add text to this area for such things as housing info, where to mail a check, plus any other data that you would like the registrant to have. This is an important area because the registrant will always have this data in their email inbox.

There is a field following this section where you can indicate that you and/or others can receive a copy of each confirmation. If more than one person should receive a copy, separate each email address with a semicolon (;).

For information on how to include your own documents as references in the confirmation email, see Upload files .

Schedule a reminder email - if you would like the system to automatically send a reminder email, you can format the email and schedule the reminder here. Click the set schedule link to show an area where you can schedule the reminder to be sent based on the number of days prior to your event start date. Note that registrations received after the reminder email are NOT sent a reminder email.

Be sure to click the SAVE button if / when you make any changes to these sections.

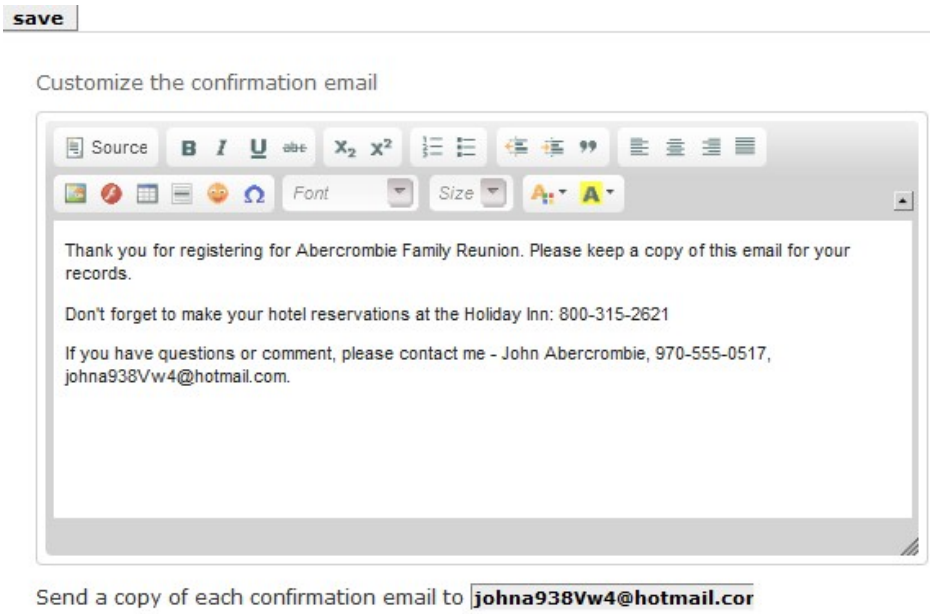
More details on editing your confirmations

All of your attendees will receive an email confirmation of their registration.

This confirmation will contain all of the details of their registration and will display the contact name, phone number and email address on the Settings page see Contact info.

If you have further details that you would like to include on this confirmation, you can choose the Text & Email on the Setup tab.

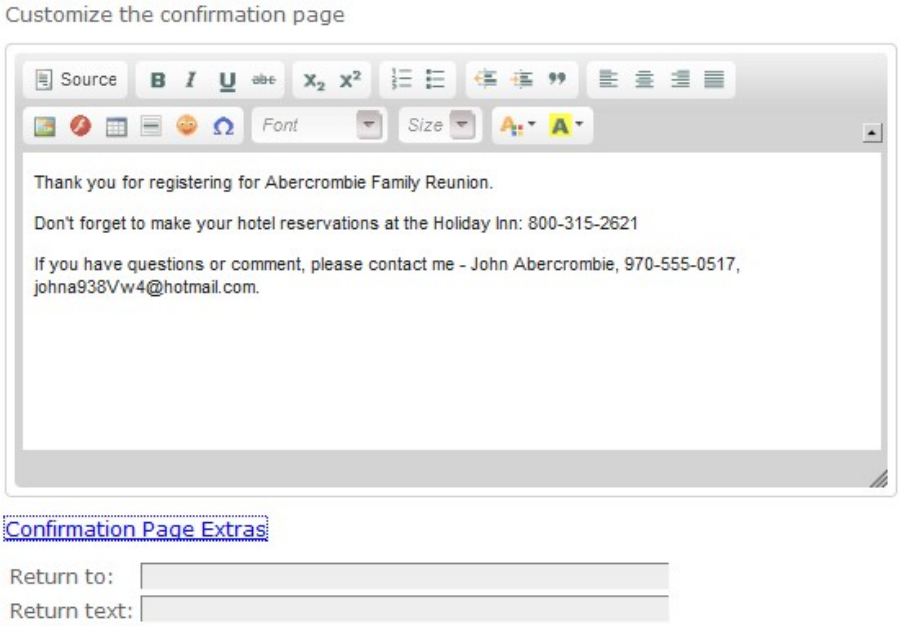
You will be shown this screen:



You can enter any text that you wish to appear on the confirmation email.

In addition, you can enter an email address that will be used to email a copy of each confirmation. If you do not wish to receive a copy of each confirmation, make sure that you blank out this area. The default is the email address of your sign up.

There are two other areas of the system that you can customize on the Edit Confirmations page. Next is the confirmation text that appears on the attendees review screen - AFTER they complete their registration:



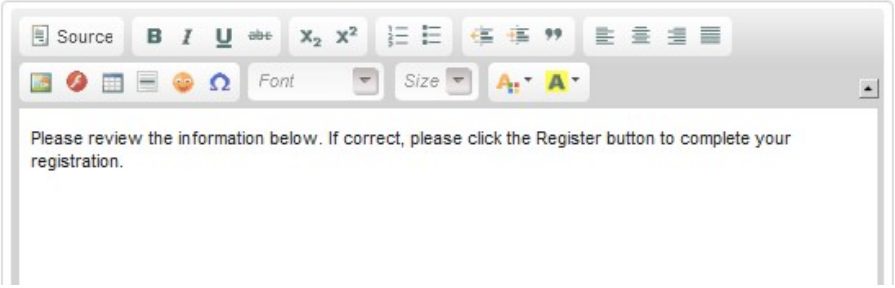
There are 2 additional fields that can be exposed by clicking the Confirmation Page Extras. These fields allow you to provide a link back to your web site if you have directed your attendee via the web.

The Return To should have the URL of your web site, the Return text will show at the end of the registration process. Attendees can click the words and be redirected to your web site:

Return to Abercrombie family web site

The third area available for customization is the Review screen, which will be displayed just before the attendee clicks the Register button to complete their registration:

Customize the review page



:

See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Using the mini-editor
Edit General section
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Survey
Edit Extras
Event Home- Manage
Other Management tasks
FAQ

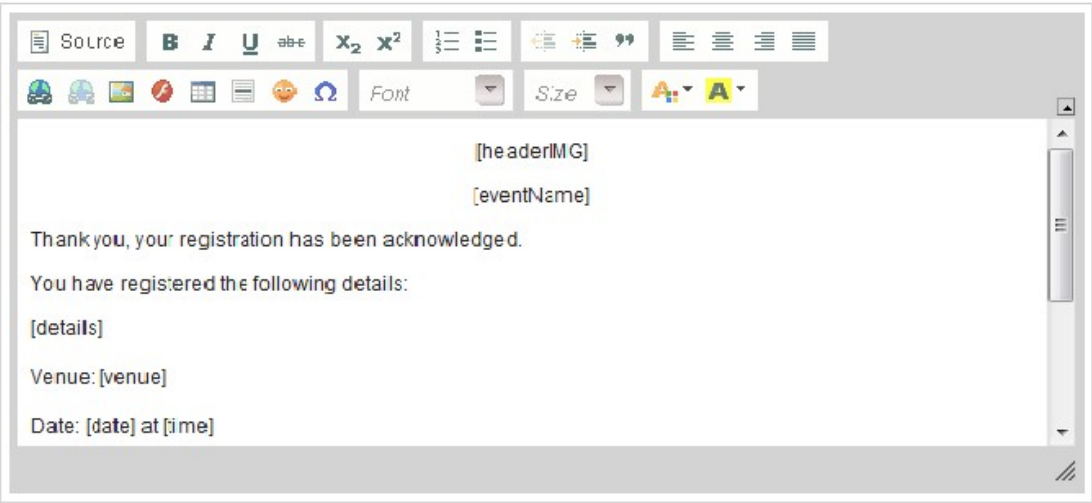
Home > Edit Text and Email > Insert data from registration into emails

Insert data from registration into emails

You may insert data from your event definition, your account set up and registrant data into your confirmation email. These fields can also be inserted into reminder emails and survey emails.

The basic confirmation already has a few fields inserted - these fields are identified by the square brackets surrounding them: [*field name*]

Customize the confirmation Preview Page Preview Email



At the bottom of the text and email page, you can expose all of the possible insertion fields by clicking the Merge Field Options link:

Merge Field Options
The codes below ([firstName], [lastName], etc.) can be used to insert data into your email message
Note the codes are case sensitive.

Registrant Fields	Event Fields	Coordinator Fields
first name: [firstName]	name: [eventName]	name: [coordinatorName]
last name: [lastName]	date: [date]	phone: [coordinatorPhone]
nick name: [nickName]	time: [time] or [time24]	email: [coordinatorEmail]
email: [email]	venue: [venue]	company name: [companyName]
reg ID: [regID]	header image: [headerIMG]	company URL: [companyWebURL]
reg description: [regType]	event link: [eventURL]	company address: [companyAddress]
member ID: [memberID]	survey link: [surveyURL]	company Email: [companyEmail]
customer ID: [customerID]	event ID: [eventCode]	company fax: [companyFax]
sessions: [sessions]		business number: [companyBusinessNumber]
auto login link: [loginURL]		
auto login using 'Click Here': [loginClickHere]		

These are the current merge fields:

Registrant Fields

first name: [firstName]
last name: [lastName]
nick name: [nickName]
email: [email]
reg ID: [regID]
reg description: [regType]
member ID: [memberID]
customer ID: [customerID]
sessions: [sessions]
auto login link: [loginURL]
auto login using 'Click Here': [loginClickHere]

Venue/ Event Fields

name: [eventName]
date: [date] -- ***Important - this is the date on the When panel. See*** *When box*
time: [time] or [time24] -- ***Important - this is the time on the When panel - even if it not shown. See*** *When box*
venue: [venue]
header image: [headerIMG]
event link: [eventURL]
survey link: [surveyURL]
event ID: [eventCode]

Coordinator Fields

Name: [coordinatorName]
phone: [coordinatorPhone]
email: [coordinatorEmail]
Company name: [companyName]
company URL: [companyWebURL]
company address: [companyAddress]
company Email: [companyEmail]
company fax: [companyFax]
business number: [companyBusinessNumber]

Here is a sample using all of the above fields in order - some fields are empty because there are not used by this event:

Registrant Fields

first name: Harry
last name: Hemstreet
nick name:
email: hhemstreet@hemko.com
reg ID: 1713750
reg description: Regular Member Early Bird (By 4/15/16)
member ID: 4687
customer ID:
sessions:
auto login link: https://www.planetReg.com/attendee_review_lookup.asp?ID1=hhemstreet%40hemko%2Ecom&ID2=1713750&ID3=E1212141810186139
auto login using 'Click Here': Click Here

Venue/ Event Fields

name: MSTA Star 2016
date: Sunday, June 26, 2016
time: 9:00 am or 9:00
venue: Stratton Mountain Resort 30 Middle Ridge Rd Stratton Mountain, VT 05155 US
header image:
event link: http://www.planetReg.com/E1212141810186139
survey link: http://www.planetReg.com/E1212141810186139_1713750
event ID: E1212141810186139

Coordinator Fields

Name: Harry Hemstreet
phone: 970-667-0460
email: hhemstreet@planetreg.com
Company name: Motorcycle Sport Touring Association
company URL: www.ridemsta.com
company address: 11321 Fernald Ave Dallas, TX
company Email: hhemstreet@planetreg.com
company fax: mmisnercpa@gmail.com
business number:

You can either copy and paste using your mouse/ keyboard or you can just key the insertion tag as shown.

See also

Home > Edit Survey

Edit Survey

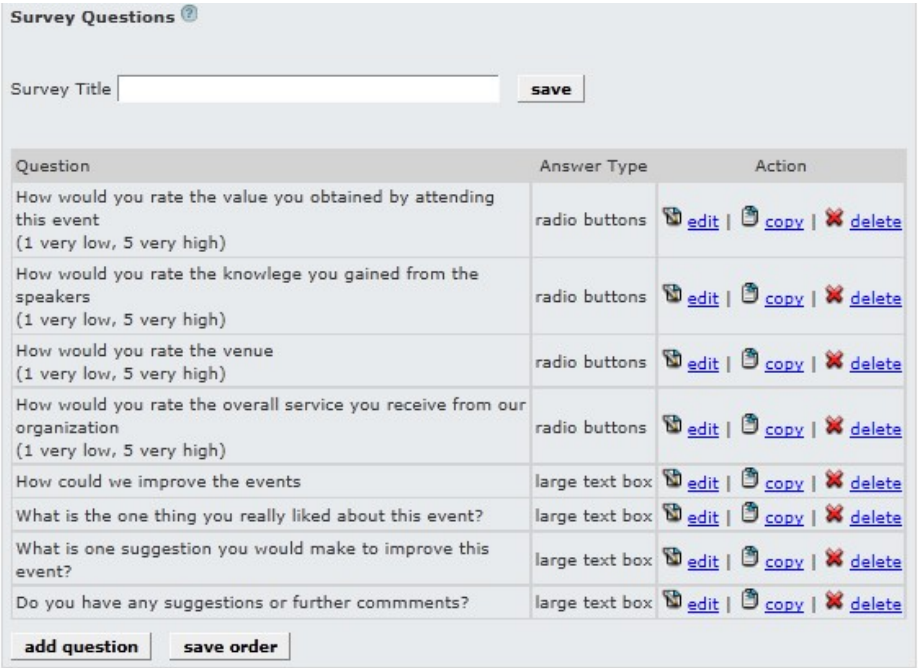
The Survey page is an optional item for your use as a post event opinion poll.

Note - it is important that you do not close your site before asking for survey results. I.e. The event status MUST BE OPEN. Make sure the Close Site date is on or after the last survey response that you expect. This date is on the Setup tab/ Extras page:

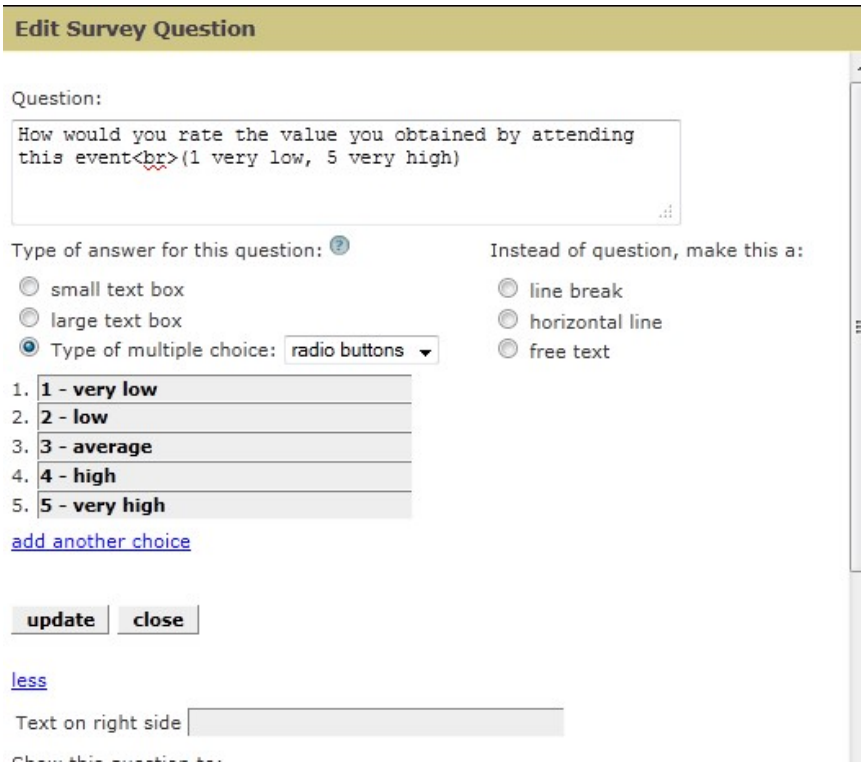
See Open and Close Dates .

It is not required that you do anything with the survey when you create or manage your event. You can go to it anytime you wish and use it at your leisure (subject to the above restrictions).

There are several 'canned' questions, typical of an opinion survey. If you do not need or want some of these questions, just delete them.



You can also alter the survey question by clicking the edit link:



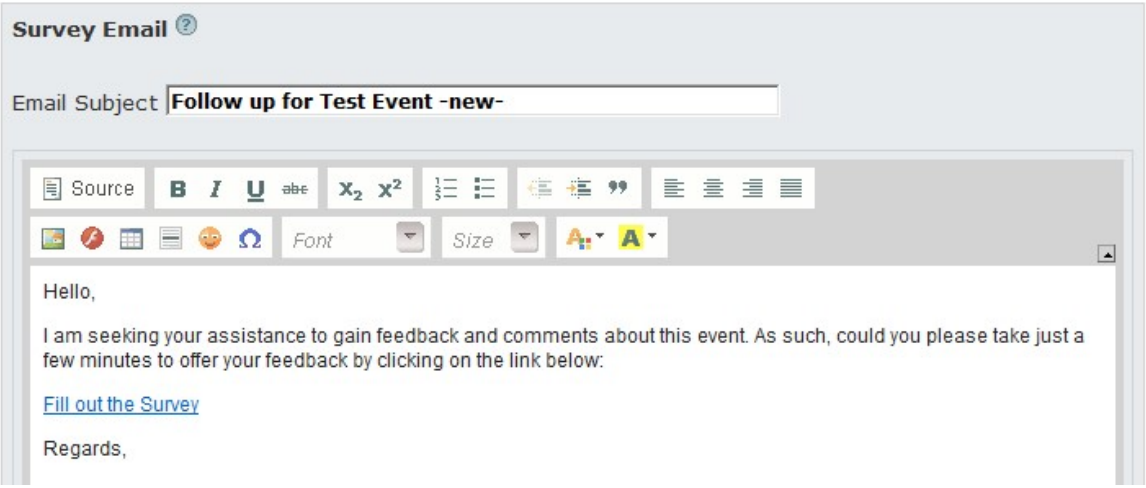
The Survey questions are just like any Custom question and can be conditioned in a similar way - i.e. only specified registration types will see the question.

Similarly, you can add your own questions to the survey - again, identical to the Custom questions on the regular questions page.

The way the survey works:

A separate email is generated based on the schedule you set:

The survey email is already partially filled in and there is a link to your survey:



Upon reaching the scheduled survey date (based on number of days after your event end date), the survey is automatically emailed to all participants.

Note that the survey link Fill out the Survey is constructed like this:

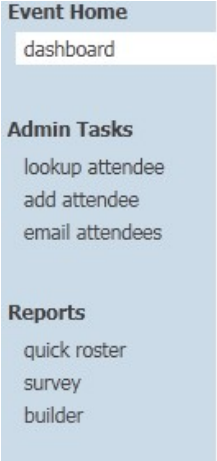
<Event URL>_<registration ID>

So it is possible for you to create your own survey link using the email merge fields - see Email Attendees

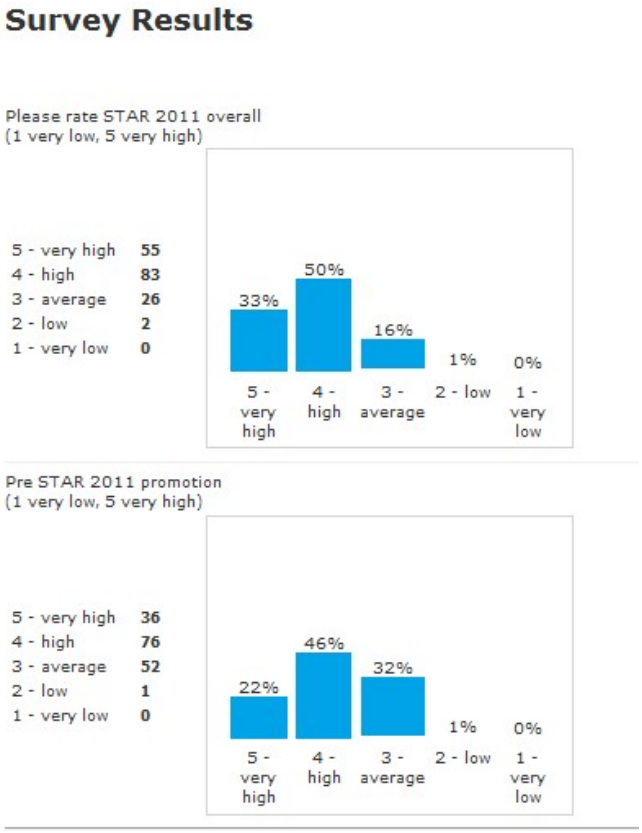
[surveyURL]

This allows you to send reminders to anyone who has not completed their surveys. Any registrant who has already completed a survey will not be allowed to re-enter the survey answers.

As soon as surveys are completed, you can begin to access the survey results on the Manage screen:



As survey results are completed, you will see graphs of how the results look:



This data is available as soon as a single survey is completed and continues to build as surveys are completed.

There are several links available to display survey data that is in text format:

Any comment on your choice of favorite STAR?
View Responses

Do you have any comments on or about STAR 11?
View Responses

What is one -best- suggestion you would make to improve this event and future STARs?
View Responses

What is the one thing you really liked about this STAR?
View Responses

Do you have any suggestion for a location for a future STAR?
View Responses

If you click those links you will see a display of any text responses.

Do you have any comments on or about STAR 11?
Hide Responses

Page 1 2 3 4 **View** 25 records per page

1 did not like the date change-do other things on the week prior to the 4th
2 The maps/routes were great! The GPS, Not so much. But I think that is something that must be addressed thru Garmin. It was NOT
3 See above
4 The Welcome needs to be worked on. I couldn't hear a thing.
My personal opinion is, SUnday night is the first time many folks meet and greet and therefore, makes it really difficult to keep their
5 A cople routes on paper were wrong. I had to make my own route.
6 I think it was an excellent effort by all involved and one of my favorite STAR events.
7 Member retention and growth is a function best managed at the local squadron level. The EC should develop programs to assist loca
8 Tooooooo many meetings!!!!!
9 Great roads in the area
10 HI food and beverage operations were the worst I have ever encountered in 40 plus years of professional traveling.
11 The paper maps were hard to follow and confusing.I felt somewhat isolated from proceedings at the secondary hotel.
12 I've been coming to these rallies since 1990 and know a lot of people, but what about the new, single rider, who doesn't know anyo
13 Dinner banquet too crowded. Banquet room listed as max. capacity of 300. Over 500 were in attendance. Tables and chairs were ve
14 Good
15 It was very good, I just didn't get in all the riding I wanted to!
16 Neither of the hotels were prepared for the number of guests. This was reflected in the service at both hotels.
17 The banquet was to much of a circus. To many failed attempts at jokes that are not funny. Just take care of business.
18 EC did a good job. My one 'low' vote was because I couldn't read the ride directions while under way and wasn't able to get the dat
19 Excellent event.

Once survey results are available, you can run a quick roster report and download the survey results.

Any respondent who has completed a survey, will have their survey answers shown at the end of their record (use Excel to open/ view data).

Note - it is important that you do not close your site before asking for survey results. I.e. The event status MUST BE OPEN. Make sure the Close Site date is on or after the last survey response that you expect. This date is on the Setup tab/ Extras page:

Open Site	date 11/4/2013	(mm/dd/yyyy)	time 3:08 PM	(hh:mm am/pm)
End Sales	date 6/11/2014	(mm/dd/yyyy)	time	(hh:mm am/pm)
Close Site	date 7/11/2014	(mm/dd/yyyy)	time	(hh:mm am/pm)
Allow Registrant Info Update	◉ Yes ○ No	end date 6/1/2014	(mm/dd/yyyy)	
Allow Registrant Cancel	◉ Yes ○ No	end date 6/1/2014	(mm/dd/yyyy)	

Cancel Fee
- ○ None
- ◉ Cancel fee = PlanetReg service fee
- ○ Custom cancel fee

See Open and Close Dates .

See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Using the mini-editor
Edit General section
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Text and Email
Edit Extras
Event Home- Manage
Other Management tasks
FAQ

Home > Edit Extras

Edit Extras

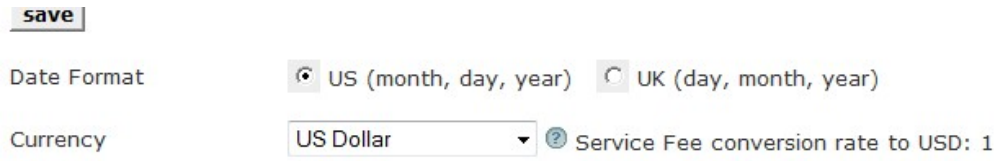
Articles in this section

See also

Home > Edit Extras > Date Format/ Currency

Date Format/ Currency

You may choose to have your dates keyed and understood throughout the system using either of two formats. The standard north american format of mm/dd/yyyy or the format used throughout the rest of the world dd/mm/yyyy. We have called that the UK format.



You may operate your event in any of the currencies shown in the drop down for currency

If you change the currency, the system will display a conversion factor for service fees. As an example, if I will be collecting Euro's for my event, you will see this display:

Currency Euro Service Fee conversion rate to USD: .73

You can see that fees will be adjusted by the conversion factor shown. If the fee for a registration is US$1.00, it will calculate and be shown on the registration as .73 Euro's.

If you need a currency that is not shown, contact us and we will add it.

See also
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Home > Edit Extras > PlanetReg Service fee

PlanetReg Service fee

You can specify on the Edit Extras page how you would like the system to handle service fees.

Service fee
- charge PlanetReg service fee as an additional line-item
- do NOT charge PlanetReg service fee as an additional item

Fee structure for this event(US Dollars): $.50 + 2.0% of Attendee's Total Checkout Amount, $9.00 maximum

The PlanetReg service fee can be handled as a separate fee, shown on your attendees financial details or bundled in your fees. The default choice, charge PlanetReg service fee... will cause the PlanetReg fee to be calculated and shown on the attendees financial summary:

Priced Items

Item	Quantity	Price	Total
Regular member	1	$30.00	$30.00
Guest (with member)	2	$25.00	$50.00
Group Photo	1	$7.00	$7.00
CD/DVD of all pictures	1	$14.00	$14.00
Fee	1	$2.52	$2.52
			$103.52

The item is shown as a Fee on pricing details for the attendee.

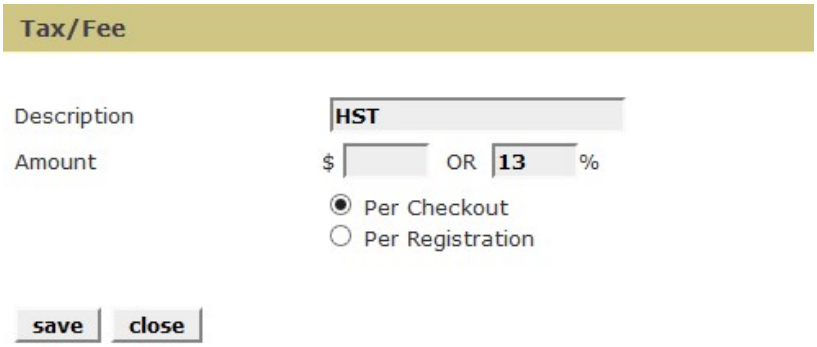
In the bundled case (do Not charge PlanetReg fee...), you would be paying the PlanetReg service fee from your funds and it would NOT show on the attendee's pricing details. Normally, you would include an approximation of the fee in your charges for the event.

See also
Date Format/ Currency
Taxes and Fees
Processing Fee

Taxes and Fees

If you would like to include fees on your event, such as taxes, you can use the Taxes/Fees link on the Extras page.

The usual function for this field would be to add taxes as are prevalent in countries such as Canada. Canada has several service tax requirements, depending on which province an event is held.



The above example shows how a Harmonized Sales Tax would be added to registrations for an event in Ontario.

You may add as many Tax/Fee entries as you wish.

If the charge is a currency amount ($), you may elect to charge that amount on a per registration basis or for a combined (per checkout). A percentage charge always applies to a checkout - i.e. for the total charges.

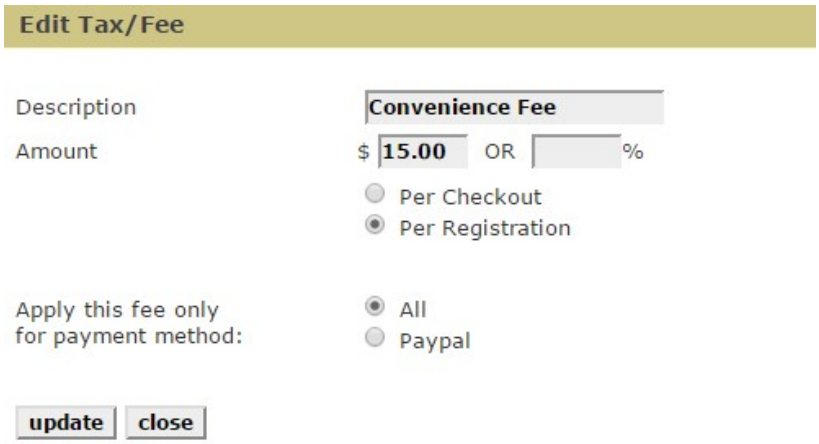
This is how the tax looks on a registrant invoice:

Priced Items

Item	Quantity	Price	Total
HST (13%)	1	C$19.50	C$19.50
Member Early	1	C$150.00	C$150.00
Total			C$169.50

Service fees, if charged on a percentage basis are not charged on taxes and fees.

You can also use this option to charge a service fee:



The fee option is similar to a tax, but it can be conditioned on whether the registrant is using Paypal or a credit card. Paypal usually charges about 3% of the amount paid via Paypal, so you could assess a 3% fee on registrants who use Paypal or a credit card. **Note that if you use credit cards via a merchant account you will also see a Credit card button**.

The above fee would be displayed on the registrants confirmation like this:

Item	Quantity	Price	Total
Convenience Fee	1	$15.00	$15.00
Early Bird Non-Member Attending September 24 & 25	1	$345.00	$345.00
Total			$360.00

If you are going to bundle the service fee in your own fee, be sure to turn off the separate service fee radio button immediately above the taxes/fees area on the Extras page.

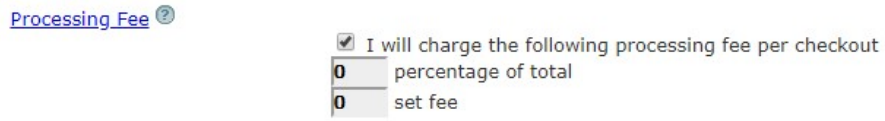
See also

Date Format/ Currency
PlanetReg Service fee
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Home > Edit Extras > Processing Fee

Processing Fee

If you would like to add an additional fee to 'fee' item on registrants confirmation you can specify the fee on the Extras page:



This is an optional fee, added into the Service Fee. It is only available if you have selected to charge the PlanetReg service fee as an additional line item. See PlanetReg Service fee.

This allows you to include an additional fee to recover your costs. The registrant will see only one fee as a single item, but it will consist of this fee plus the PlanetReg service fee.

Your processing fee can be a percentage, a set fee, or both.

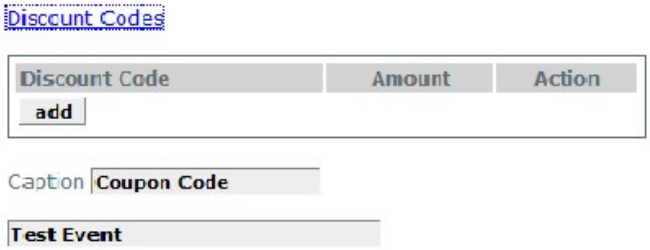
See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

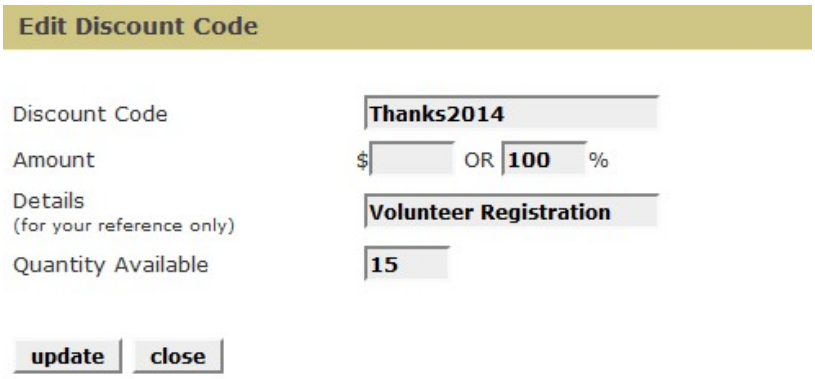
Home > Edit Extras > Discount codes

Discount codes

If you have a discount schedule, you can define it on the settings page by clicking the Discount codes link:



When you click the add choice, the following box will appear:



You can provide the Discount Code to selected attendees, when they use the Discount Code, the indicated percentage or dollar amount will be deducted from their total cost.

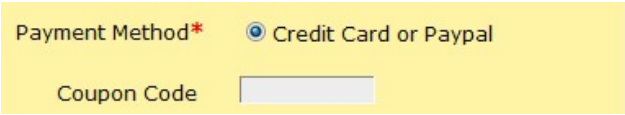
The discount code is not case sensitive so, in the above case, thanks2014 and THANKS2014 will cause the same discount to be applied.

You can enter as many discount codes as you like.

The Details entry is for your own reference and is not shown to the attendee.

You may restrict the number of times a discount code is used by specifying a quantity available.

When attendees register, they will see a place to enter Coupon Code (or whatever you want to call it):



You can change the description of the code by over keying the caption for the code.

See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Home > Edit Extras > Payment Text

Payment Text

If you would like a display of payment instructions near the payment check area, you can use the Payment Text:

Payment Text

show as tool tip

```
If you are paying by check, please make out the
check to:  Single Minded Group

and mail to:
George Abercrombie
6701 Federal Blvd.
Denver, CO  80202
```

This is an optional item. If you use it, it will also be displayed on the registrants confirmation.

See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Partial or timed payments

If you would like to offer registrants an opportunity to make multiple payments, you can click the radio button next the legend Partial Payment:

Taxes/Fees

Discount Codes

Payment Text

Partial Payment ○ Yes ◉ No

That will prompt additional dialogue:

Partial Payment ◉ Yes ○ No

Minimum First Payment 0

Minimum Follow-up Payments 0

Status ◉ Active ○ Hold

Send Confirmation After ◉ Balance of 0 ○ Each Payment

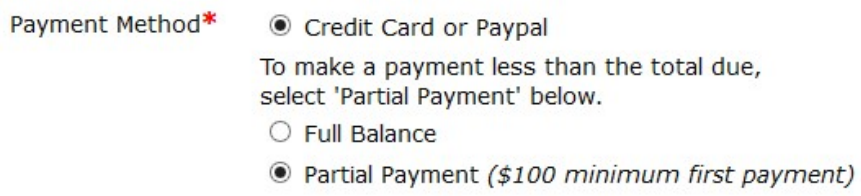
Some important notes on using the Partial Payment method:

1. The partial payment method is applied to the checkout amount, so if you have multiple people registering on the

same registration, the minimum is applied to WHOLE amount - i.e. it does not apply 'per person'. As an example, let us say that you have a minimum of 100.00 first payment, each person is being charged 200.00 and 3 people register on the same form, creating a checkout amount of 600.00. The minimum payment will still be 100.00, NOT 3X100.00 or 300.00. You could get around this by setting the minimum and maximum registrations: see Registration type.

2. The system does not automatically send emails to solicit subsequent payments. You have to do that manually. See the sample solicitation email below.

If you are using the Partial Payment option, your registrants will see an additional selection below the radio buttons to select payment type:



The meaning of each field:

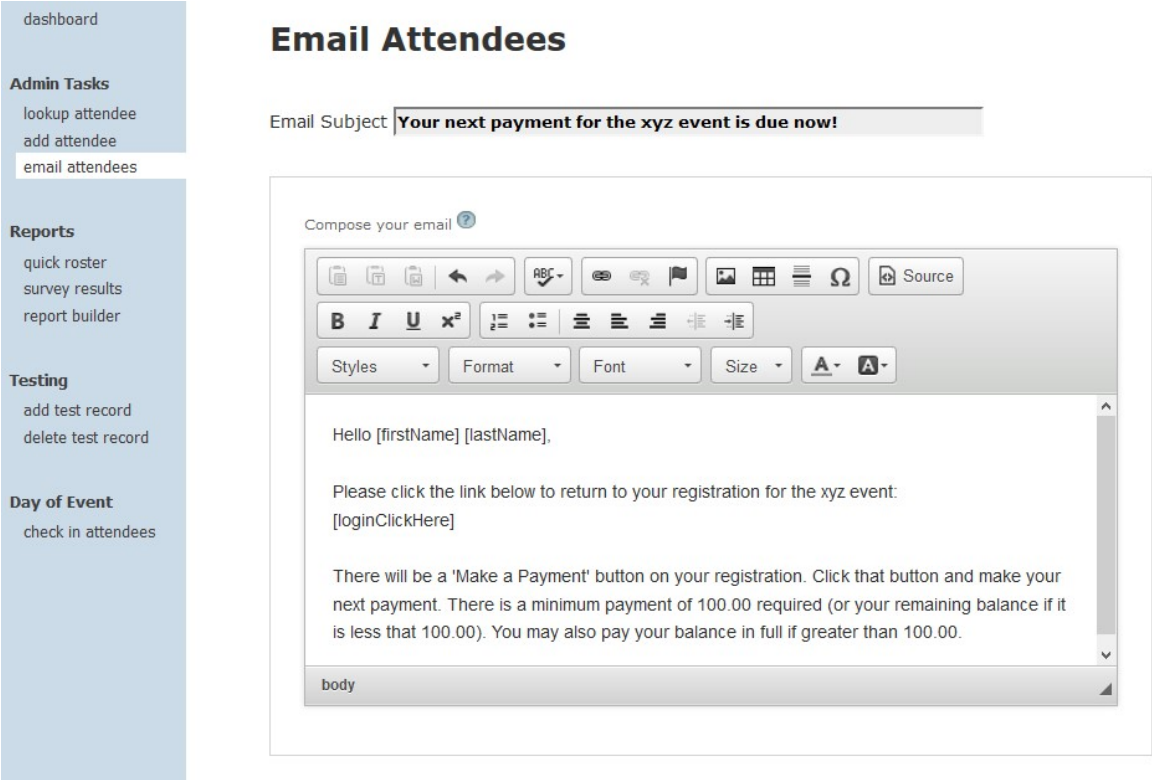
Minimum First Payment - enter the minimum amount that must be paid to complete a registration. The registrant will be able to see this amount and can enter an amount greater, but not less the amount shown here. I.e. if you want a minimum of $100.00 first payment, the registrant can choose any amount from $100.00 up to the maximum value of the registration. If the total value of the checkout is less than the minimum then that is the payment that will be required.

Minimum Follow-up Payments - if a balance is still due on subsequent payments, this is the minimum amount due. If the balance due is less than this amount, that will be the minimum payment due.

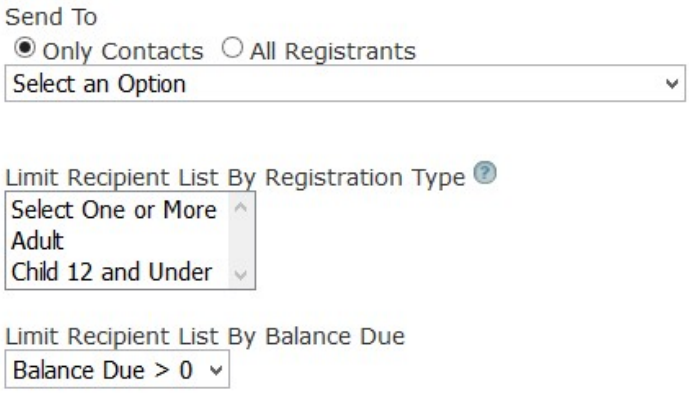
Status - Normally the system creates a Hold status for registrants who fail to complete their payment. Also, if a payment is skipped or aborted, the registrant gets an email explaining that they are in Hold status until a payment is completed. When you use the Partial Payment method, you can decide how to treat those who have either paid the partial payment (less than the full balance due) or not paid at all. If you decide to leave them in Hold status, they will remain that way until they are paid in full. If you decide to make them Active, they will become Active regardless of their payment status/ balance due.

Send Confirmation - Normally a confirmation is only sent when a registrant pays in full, however you can tell the system to send a confirmation after each payment or to only send a confirmation when all payments are completed.

When you are ready to ask for subsequent payments, you can use the Email Attendees function to contact those who still have a balance due:



Make sure that you restrict the email to only those with a balance > 0 :



See also

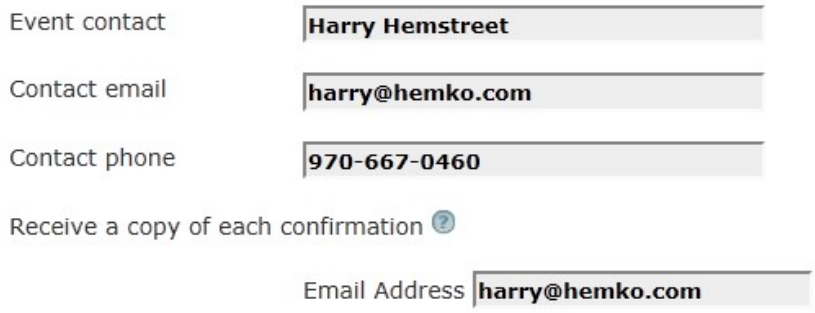
Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check

Administrative Code

Home > Edit Extras > Contact info

Contact info

You can check and or edit the contact information for your event on the Edit settings page:



It is important to have this information available to your registrants.

You can have multiple recipients for each copy of confirmations by entering multiple email addresses, separated by a semicolon (;).

The event contact information will automatically show up on your attendee's emailed confirmation.

See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Mobile phone notification

If you would like to receive notification of registrations on your mobile / cell phone as a text message:

Enter your cell phone number and select the carrier.

You should be aware that text messages can generate additional charges on your mobile/ cell phone bill.

Please check your phone plan to make sure you know what the cost is or if you have an inclusive plan that includes text messages.

This is a very brief message. You can continue to receive email copies of registrations if desired.

See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

breadcrumbs]

Open and Close Dates

You can specify the open date, end sales and close site dates for your event on the Edit settings page:

The Open Site date (and time) can be used to specify when your site will become available for use. When you are testing your site, be sure that this date is in the past.

The End Sales date and time specify the last date/ time that an attendee can register. If you do not enter a time, the system defaults to midnight on the date shown. That is midnight of the time zone you chose when you created your event.

The Close Site date and time specify when attendees can no longer access their registrations. Up until that date, attendees can look up their registrations. Please be aware that if you use a Survey, the Close Site date must include the last date you expect to receive survey results. See Edit Survey .

As the administrator, you can add attendees between the End Sales date and Close Sales date.

If you want to end or close at a time other than midnight, you can enter the time as AM or PM. If your close time is 5:00PM, enter it as:

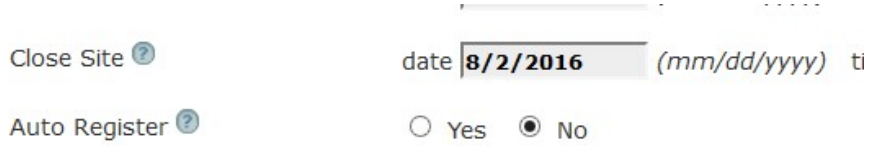
5:00 PM in the time: box.

See also
Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Home > Edit Extras > Auto Register

Auto Register

If you wish to skip the first page of your registration and go directly to the questions page, you can use the Auto Register function on the Extras screen:



Note that using this option will cause the first page (Layout) of the registration to be skipped.

The registration will start with the questions page.

The system will automatically assign the first registration type to the registration.

This is not a recommended selection but has been included for the rare case where it is desired.

It is NOT available for free registrations.

See also
Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check
Administrative Code

Home > Edit Extras > Allow registrant Update and Cancel

Allow registrant Update and Cancel

If you would like to allow your registrants to access their registrations and make changes, you can select the Yes radio button for that choice. You may also specify an end date, beyond which the registrants can no longer make changes.

When you select Yes for this option, the registrants confirmation will contain an Edit button which will allow certain

changes to be made. The registrant can change - this link on the registrant confirmation can be clicked:

Should you wish to review your arrangements, click here to login.

The registrant will see this on their confirmation:

(Registration 1, ID Number: 896347) Edit

Regular Member	
First Name	**Dennis**

You may also allow your registrants to cancel their own registration by selecting the Yes radio button next to that choice.

You can specify an end date for self cancellation as well as rules regarding a cancel fee.

If you allow self cancellation there will be a button on the confirmation page:

An email confirmation has already been sent.
Click on this button to request an **additional** email confirmation.
Send Email Confirmation

Go to Cancel page

The cancel page will allow selection of individuals within the registration (if it is for multiple people), so that partial cancellations are possible.

When a registrant cancels and there are charges involved, the system will reverse the original invoice and show a refund due. The system does not issue refunds - you as an organizer must do that.

A confirmation will be sent to the same email addresses as a normal confirmation but it will have the legend (CANCEL) at the end of the event description.

See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Include an Add to Calendar button
Duplicate check
Administrative Code

, Home > Edit Extras > Include an Add to Calendar button

Include an Add to Calendar button

If you would like to offer your registrants an option to add your event their electronic calendars, you can click the appropriate radio button on the extras page:

Display "Add to Calendar" ○ Yes ◉ No

Receive a copy of each confirmation

If you click Yes, they will see the add to calendar widget on their confirmation page after registering.

The date and time of the calendar entry is based on the Layout pages' When box.

If there is no time entered, it will add the event as midnight on the date shows. You can add a time to the when box but elect to not show it.

The calendar widget works for:

Outlook, Google, Yahoo, Hotmail, iCal
Note that the calendar addition will contain any text that is displayed in the "Event Details" section on the Layout page. That section occurs just below the Registration Types. The inclusion of event details may be suppressed if that section is too long.

The calendar request will be presented to the user as an appointment which normally must be emailed to the registrant. Once the email is received it can be attached to the registrants calendar.

Also, the registrant can add the calendar entry after registration by clicking the click here indicator on their confirmation. There will be an add to calendar button when they review their confirmation.

See also
Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Duplicate check
Administrative Code

Home > Edit Extras > Duplicate check

Duplicate check

At the bottom of the Settings page, you will see this set of radio buttons:

The default setting for duplicate checking is Yes.

This means that the system will check any attempts to register with the same email address against the data base of already registered attendees.

The registrant can then use their ID and last name to look up their own registration. Note that the ID is not shown in this duplicate check pop up screen, so an attendee must have their original email confirmation to find an ID number. This is a security feature that will attempt to keep registrant reviews restricted to the actual registrant.

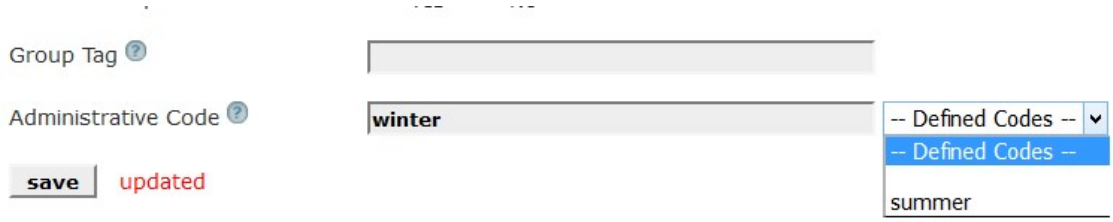
If you click the No choice, no duplicate checking will be performed.

See also
Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Administrative Code

Home > Edit Extras > Administrative Code

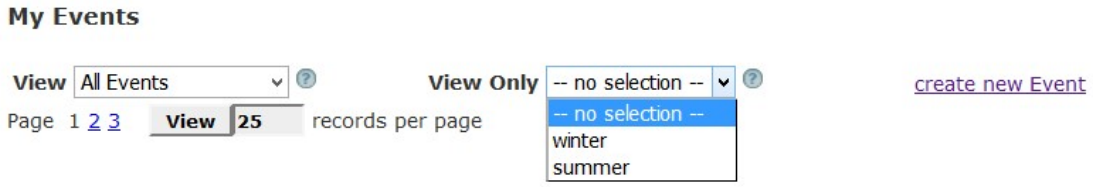
Administrative Code

We have many clients who operate multiple events. In order to better categorize events, we have added a user defined administrative code:



This code can be assigned to multiple events and if a previous code has been defined, it can be accessed by using the 'Defined Codes' box on the right of the code.

The code will be including in all csv files downloaded. It can also be used as a filter in the 'my events' display:



See also

Date Format/ Currency
PlanetReg Service fee
Taxes and Fees
Processing Fee
Discount codes
Payment Text
Partial or timed payments
Contact info
Mobile phone notification
Open and Close Dates
Auto Register
Allow registrant Update and Cancel
Include an Add to Calendar button
Duplicate check

Home > Event Home- Manage

Articles in this section

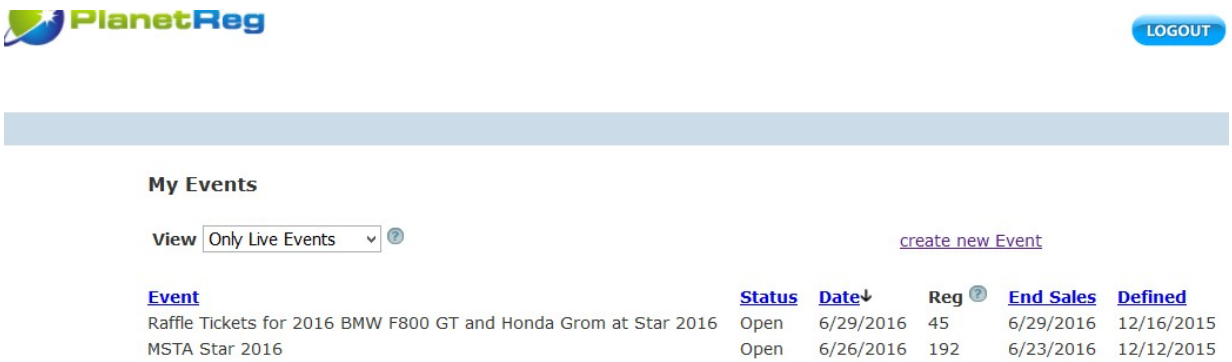
See also

What's new with PlanetReg
Welcome
Sample Events
Getting started
Using the mini-editor
Edit General section
Edit Layout
Collect info for one registrant only
Edit Questions
Edit Text and Email
Edit Survey
Edit Extras
Other Management tasks
FAQ

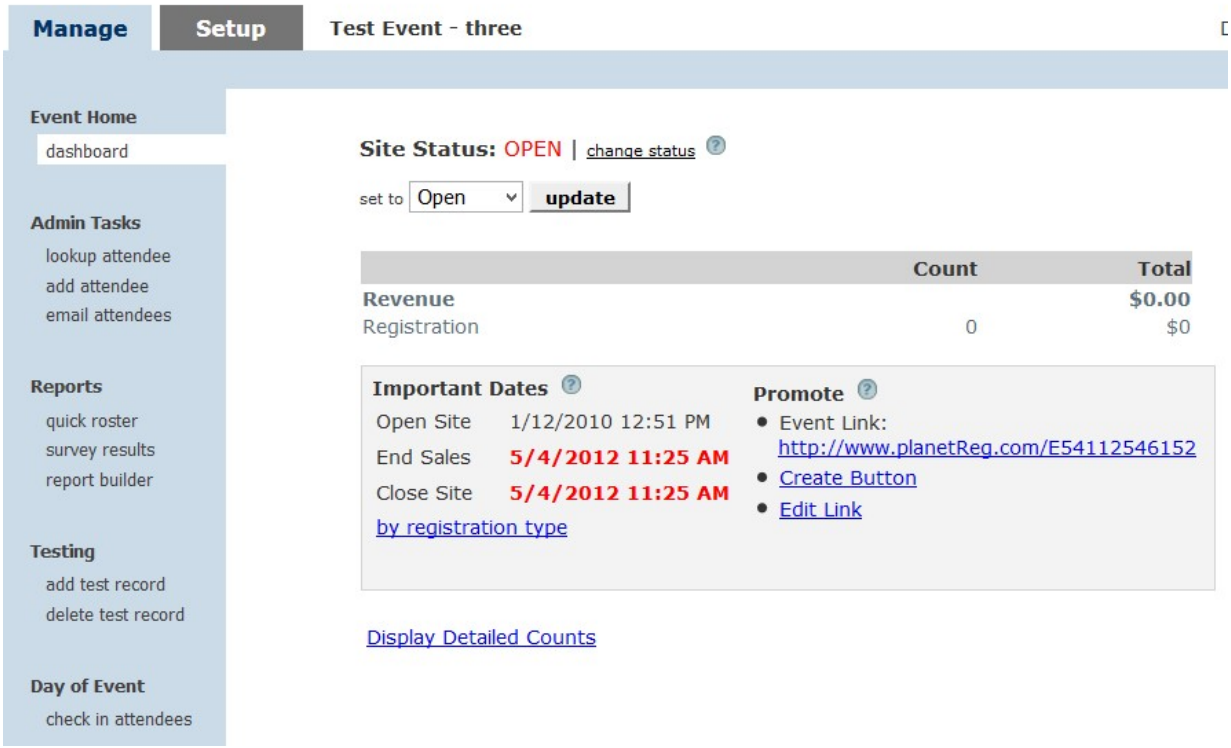
Home > Event Home- Manage > Event home overview

Event home overview

When you first login to your existing account (one with events defined), you will see list of your events. To proceed to an individual event dashboard, just **click on the event name**:



Once you have gone through all of the setup screens for your event, you will be placed in the Event Dashboard on the Event Home screen.



There are two tabs on this screen - Manage and Setup. If you have more Setup work, click that tab and all of the component sections of your event will be shown. Just click the section you wish to modify and it will be displayed in a window adjacent to the menu.

The following help segments will step you through all of the various tasks that can be accomplished from your Event Home, Manage tab:

- Dashboard - the default landing when you click the Manage tab. Displays some counts, shows you the event link and has an additional link to see detailed counts of your registrant choices.
- Look up an attendee, will not only allow you to find any attendee in your data base, but will allow you to make certain modifications to an attendee record.
- Add an attendee, allows you to enter attendees from your administrator login.
- Email attendees, allows you to set up and email attendees based on criteria you choose.
- Produce a roster report, allows you to list all of your attendees and download a delimited file of attendees.
- Survey - allows you to look at survey results if you have conducted your survey.
- Builder - a more extensive roster report which gives you more selectivity. The builder can also produce financial reports.Edit Confirmations, allows you to add verbiage to the review screen and email confirmations your attendees will receive.
- Add a test registration, this can be done even after you have opened your event for active registration.
- Delete a test registration, can be used if you wish to keep your data base clean.
- Change the status of your event; i.e. Open the event.
- Copy your event link when you are ready to publish.
- See the financial totals for your event.

If your event is a free event, you also have the option of turning off ads. Free events in PlanetReg are ad supported, so you registrants will see ads supplied by Google on their registration page.

If you do not want your registrants to see these ads, you can turn them off by click the remove ads link. If you turn off ads, you will be charged .50 per checkout. There is a message regarding this charge when you turn off ads. Should you change your mind, there will be a link to re-instate ads, however you will be charged for any registrations occurring while ads are turned off.

See also

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Display detailed counts

There is a link on the event dashboard which will display detailed counts of registration types, additional items and custom questions, if the custom question has a value that can be enumerated.

For example - a display of registration types:

Registration Types

Reg Type	Capacity	Sold	Price	Total
Regular member	99999	218	$40.00	$8,720.00
Sustaining/Life member	99999	62	$36.00	$2,232.00
Guest	99999	17	$0.00	$0.00
Member of Household where Primary member is a Regular Member	99999	65	$40.00	$2,600.00
Member of Household where Primary member is a Sust	999999	27	$36.00	$972.00

A display of Additional Items:

Additional Items

Item	Capacity	Sold	Price	Total
Small SS Regular Member	99999	2	$15.00	$30.00
Medium SS Regular Member	99999	7	$15.00	$105.00
Large SS Regular Member	9999	17	$15.00	$255.00
X Large SS Regular Member	9999	32	$15.00	$480.00
XX Large SS Regular Member	99999	9	$15.00	$135.00
Small SS Sustaining/Life Member	99999	1	$13.50	$13.50
Medium SS Sustaining/Life Member	99999	4	$13.50	$54.00
Large SS Sustaining/Life Member	9999	7	$13.50	$94.50
X Large SS Sustaining/Life Member	9999	15	$13.50	$202.50
XX Large SS Sustaining/Life Member	99999	1	$13.50	$13.50
Small LS Regular Member	99999	1	$15.00	$15.00
Medium LS Regular Member	99999	5	$15.00	$75.00
Large LS Regular Member	9999	21	$15.00	$315.00
X Large LS Regular Member	9999	10	$15.00	$150.00
XX Large LS Regular Member	99999	7	$15.00	$105.00
Medium LS Sustaining/Life Member	99999	1	$13.50	$13.50
Large LS Sustaining/Life Member	9999	9	$13.50	$121.50
X Large LS Sustaining/Life Member	9999	11	$13.50	$148.50
Small Henley Regular Member	99999	1	$18.00	$18.00
Medium Henley Regular Member	99999	4	$18.00	$72.00
X Large Henley Regular Member	9999	8	$18.00	$144.00
XX Large Henley Regular Member	99999	3	$18.00	$54.00

And a display of custom questions:

Custom Questions

Question		Responses
Discount code		7
Emergency Contact name		258
Emergency Contact Phone Number		258
I am interested in Dual Sport riding at STAR	- Yes	30
I will require printed route maps	- Yes	149
If you are ordering a lunch ride ticket, please...	- Ham	112
If you are ordering a lunch ride ticket, please...	- Turkey	178
If you are ordering a lunch ride ticket, please...	- Cheese	6
If you are ordering a lunch ride ticket, please...	- Peanut butter and jelly	7

Refresh Detailed Counts

Note that some custom questions just show you the number of entries since there is no enumeration.

The link under the display allows you to refresh the counts as you look at them.

See also

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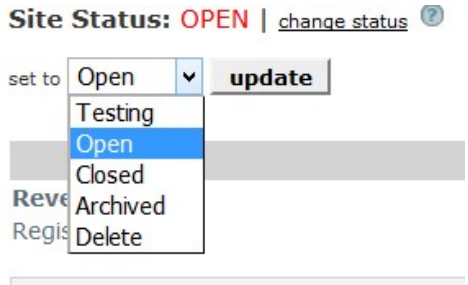
Home > Event Home- Manage > Event status

Event status

When you define a new event, it is always in the Testing mode. Once you are ready to change your event status and open it to your attendees, you will want to click on the change status link on the Event Home page:



To open your event, choose the Open option on the event status drop down.

If you wish to turn off your event for future registrations or just temporarily close your site, choose the Closed option.

If you want to pass around your event for associates to see and test, be sure to leave it in Testing mode.

If you want to delete this event, choose the Delete option.

If you have a problem with your event and wish to Close it temporarily while you fix the problem, change the status to Closed, fix the problem, then change the status back to Open.

See: I made a mistake and need to STOP registrations

After your event is completed, you may want to choose the Archived option.

See also
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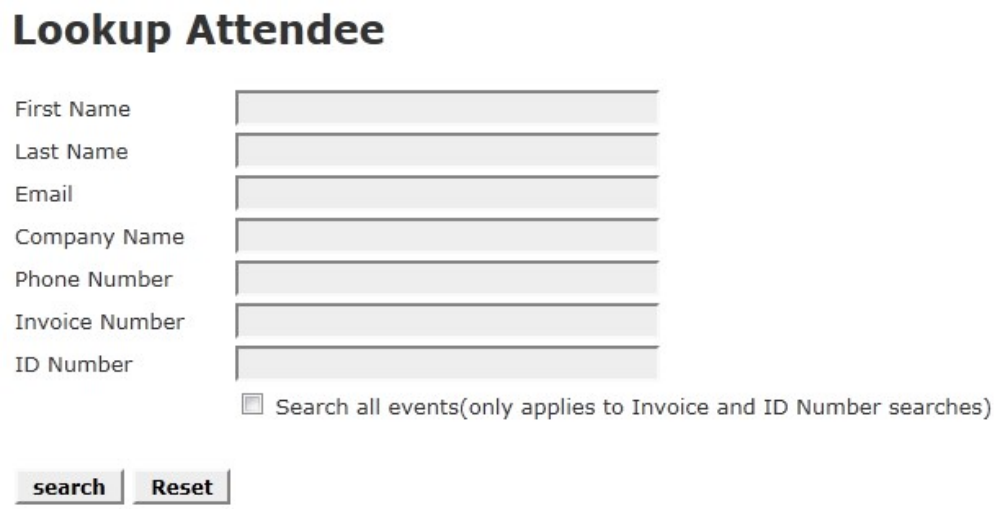
Home > Event Home- Manage > Lookup attendee

Lookup attendee

Once you have started to take registrations, there are several tools available to manage your event. If you want to look at details for a single registration, use the Lookup Attendee link:

You will be presented with this screen:



You can enter as much information as you have and press the search button. All registrants that match your search criteria will be shown. For example, if you enter only the first name (bob), all registrants with a first name of Bob will be shown. Capitalization is not relevant.

Once a list is produced, you can click the ID link for the registrant of interest and you will be shown the registrant details.

See the next help section Attendee maintenance for a view of actions available.

See also
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Add attendee

Under Admin Tasks on the Manage tab, you will see the add attendee link.

This link will direct you to your event form where you can add an attendee as an administrator.

There are a couple of very important differences when you add an attendee as an administrator:

1. **All inventory is overridden** - so if you have sold out of your registration allotment and/or have sold out of any inventory controlled items in the Additional Items or Sessions, **these counts will be ignored** when you do an administrative add attendee.

2. **Date restrictions will be ignored** - so you can enter an early bird registration after deadline, you can add additional items after their cutoff date and you can enter a registration after the event close date(s) have arrived.

3. **Payment type may be skipped** - you can enter payments manually after completing the registration.

4. **Waiver can be skipped** - since you are not the registrant. If you print the waiver on registrants confirmation, you should probably check the waiver box so the registrant can see what they are agreeing to. If you are entering a mail registration which has the waiver, be sure to check the waiver box.

It is very important that you understand that normal restrictions are bypassed on an administrative add attendee .

If your event is not free, there is a .50 charge to add an attendee through this link. The normal 2% of checkout amount does not apply.

See also

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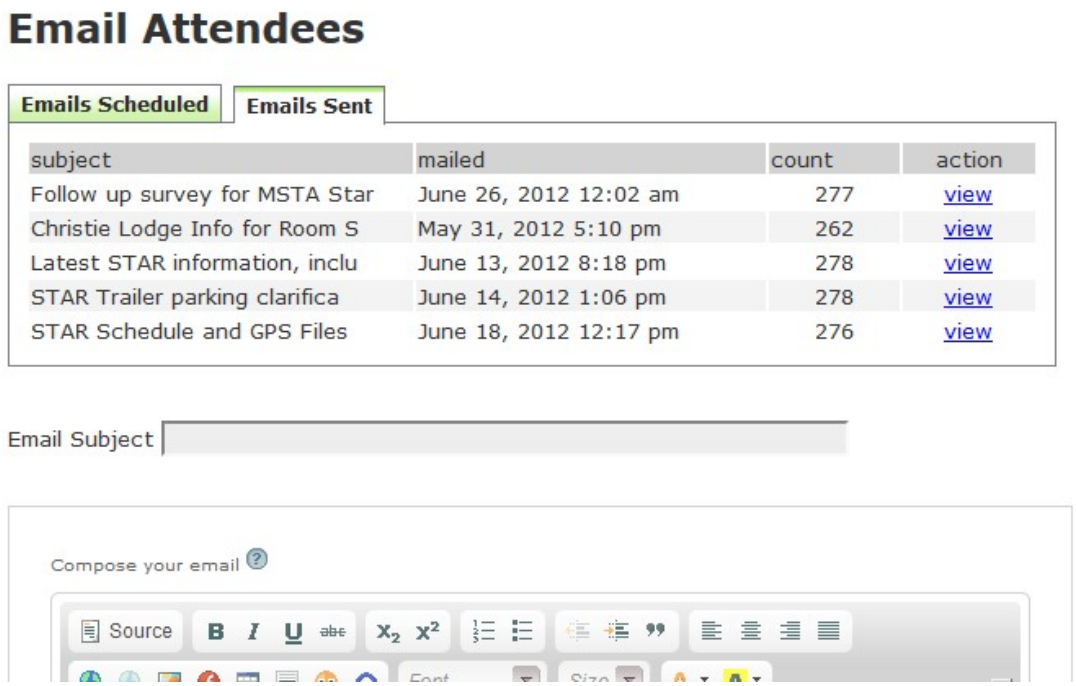
Email Attendees

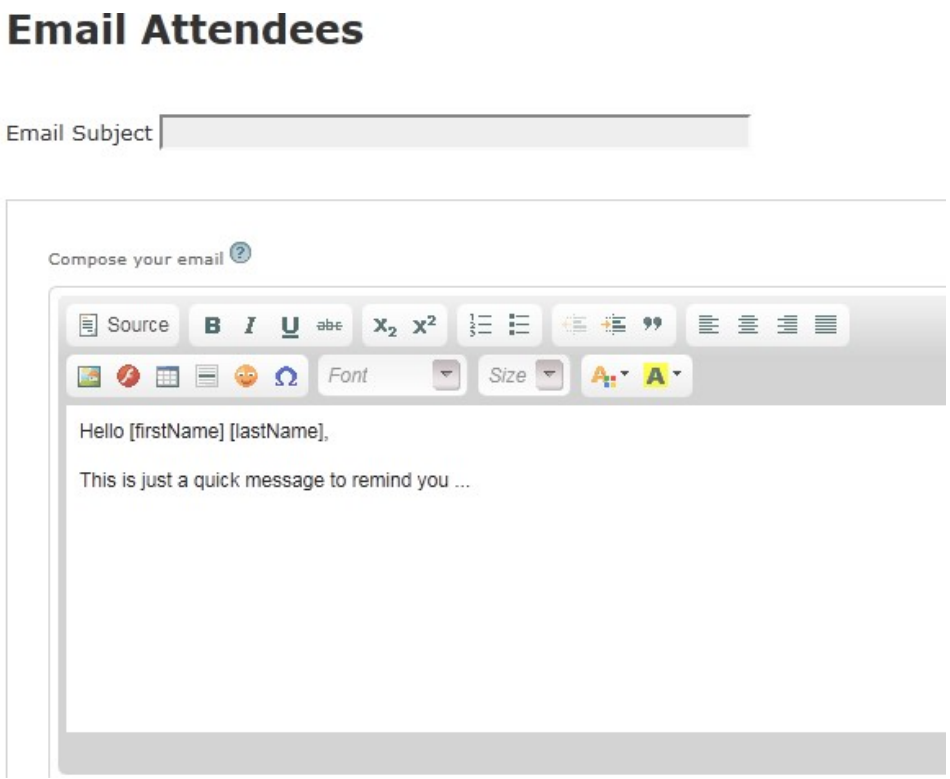
Under Admin Tasks on the Manage tab, there is a link to email attendees.

All emails generated by you, the administrator, will show your email address in the From section of the email. That address is on the extras page and is the email address noted as Contact email:

If you have emails scheduled but not sent, they will show up in the Scheduled tab. The emails sent tab will display all emails that have been sent.



When you click the email attendees link, you will be presented with a screen you can use to compose an email to your attendees:



The email contains a brief starting text and a box for the email subject to help you compose your email. You will note that [firstName] and [lastName] are shown in brackets.

These are two of the data fields that you can optionally include in your email to personalize it.

There are other fields you can place in your email - these fields are exposed by clicking the merge field options link:

Merge Field Options
The codes below ([firstName], [lastName], etc.) can be used to insert data into your email message
Note the codes are case sensitive.

Registrant Fields	Event Fields	Coordinator Fields
first name: [firstName]	name: [eventName]	name: [coordinatorName]
last name: [lastName]	date: [date]	phone: [coordinatorPhone]
nick name: [nickName]	time: [time] or [time24]	email: [coordinatorEmail]
email: [email]	venue: [venue]	company name: [companyName]
reg ID: [regID]	header image: [headerIMG]	company URL: [companyWebURL]
reg description: [regType]	event link: [eventURL]	company address: [companyAddress]
member ID: [memberID]	survey link: [surveyURL]	company Email: [companyEmail]
customer ID: [customerID]	event ID: [eventCode]	company fax: [companyFax]
sessions: [sessions]		business number: [companyBusinessNumber]
auto login link: [loginURL]		
auto login using 'Click Here': [loginClickHere]		

To use a field, follow the format shown exactly. If you miss-spell a field name, it will not be included. Do not copy and paste the field names, key them in exactly as shown. For example, if I want show the event name in the email, I would type [eventName]. The header image [headerIMG] is the image shown on the first page of your event form. Be a bit careful with that if your image is large.

These are the current merge fields:

Registrant Fields

first name: [firstName]
last name: [lastName]
nick name: [nickName]
email: [email]
reg ID: [regID]
reg description: [regType]
member ID: [memberID]
customer ID: [customerID]
sessions: [sessions]
auto login link: [loginURL]
auto login using 'Click Here': [loginClickHere]

Venue/ Event Fields

name: [eventName]
date: [date]
time: [time] or [time24]
venue: [venue]
header image: [headerIMG]
event link: [eventURL]
survey link: [surveyURL]
event ID: [eventCode]

Coordinator Fields

Name: [coordinatorName]
phone: [coordinatorPhone]
email: [coordinatorEmail]
Company name: [companyName]

company URL: [companyWebURL]
company address: [companyAddress]
company Email: [companyEmail]
company fax: [companyFax]
business number: [companyBusinessNumber]

Here is a sample using all of the above fields in order - some fields are empty because there are not used by this event:

Registrant Fields

first name: Harry
last name: Hemstreet
nick name:
email: hhemstreet@hemko.com
reg ID: 1713750
reg description: Regular Member Early Bird (By 4/15/16)
member ID: 4687
customer ID:
sessions:
auto login link: https://www.planetReg.com/attendee_review_lookup.asp?ID1=hhemstreet%40hemko%2Ecom&ID2=1713750&ID3=E1212141810186139
auto login using 'Click Here': Click Here

Venue/ Event Fields

name: MSTA Star 2016
date: Sunday, June 26, 2016
time: 9:00 am or 9:00
venue: Stratton Mountain Resort 30 Middle Ridge Rd Stratton Mountain, VT 05155 US
header image:
event link: http://www.planetReg.com/E1212141810186139
survey link: http://www.planetReg.com/E1212141810186139_1713750
event ID: E1212141810186139

Coordinator Fields

Name: Harry Hemstreet
phone: 970-667-0460
email: hhemstreet@planetreg.com
Company name: Motorcycle Sport Touring Association
company URL: www.ridemsta.com
company address: 11321 Fernald Ave Dallas, TX
company Email: hhemstreet@planetreg.com
company fax: mmisnercpa@gmail.com
business number:

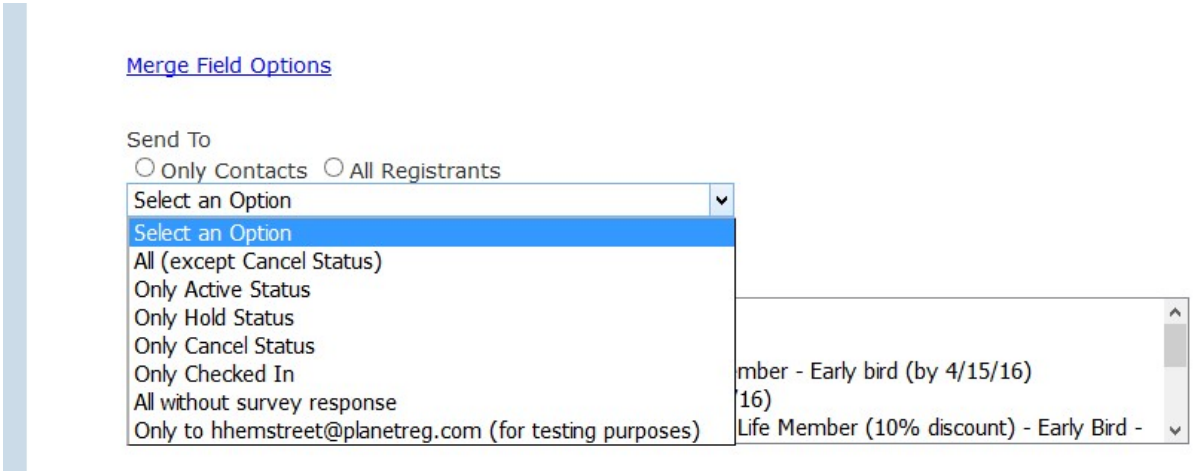
The next panel in the send email function will ask you about who you want to send this email to.

If you want to test your email before sending it to everyone, choose that option. The email address here is the contact email for your event.

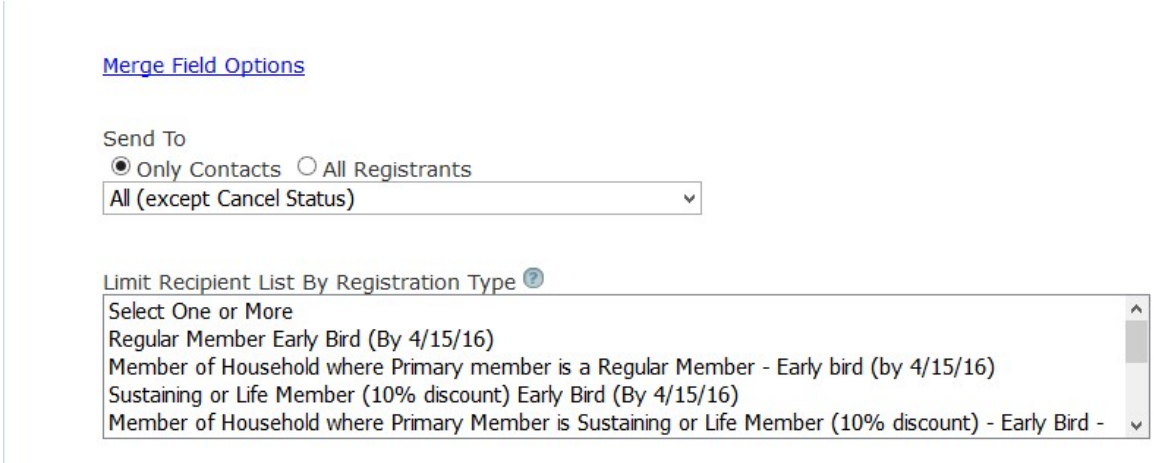
You can condition the email to only go to specific status codes. Note that the difference between **Only Contacts** and **All Registrants** means:

Only Contacts - just the main or first email on a registration - if it has more than one registrant with different emails, only the first or main contact will receive an email.

All Registrants - If a registration contains multiple attendees and attendees have a different email that the main or first registrant, all unique emails in the registration will get an email.



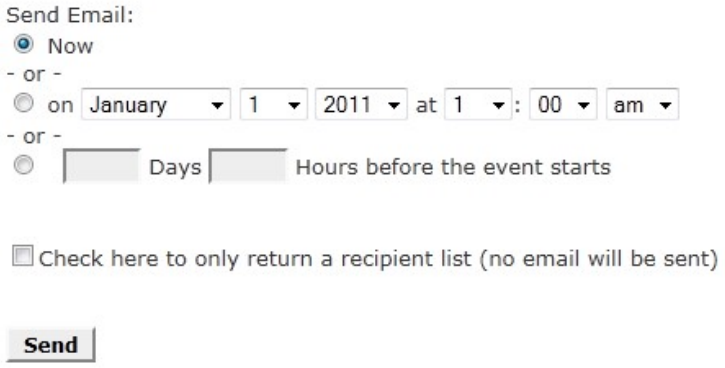
The next panel allows you to condition your email by registration type:



You can send to more than one registration type - or choose to **not LIMIT** the email by leaving this item unchecked. To choose more than one registration type, hold down the <ctrl> key as you select each type with the right mouse button.

This restriction is in **ADDITION** to any status selection you have made in the panel above.

The final send email panel allows you to select when to send this email:



Now - means just that - immediately send this email based on your selection critera.

You can also send the email on a specific date and time - the second selection.

You can send the email based on the number of days and/or hours before the event is scheduled to occur - the last selection.

When you are satisfied, click the Send button an the email will be either queued or sent. As soon as the emails are completed, you will get an email showing a list of recipients.

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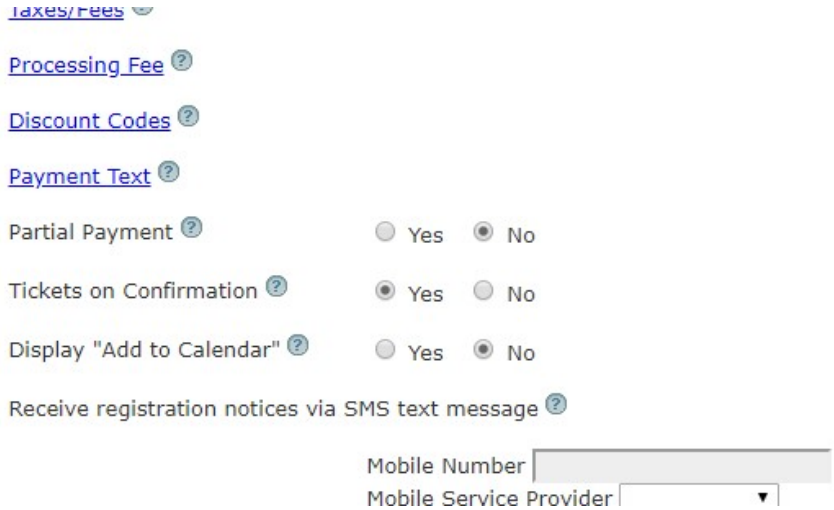
Event Tickets

You can have PlanetReg include a ticket stub on confirmations.

To include this section on each confirmation Click the Tickets on Confirmation Yes button on the Extras page in Setup.



The confirmation with tickets look like this:

Priced Items

Item	Quantity	Price	Total
Fee	1	$.52	$.52
Register me	1	$1.00	$1.00
Total			$1.52

Financials

Transaction ID	Description	Date	Amount
596211	Invoice	2/10/2015 2:06 PM	$1.52
596223	Paypal Payment	2/10/2015 2:08 PM	($1.52)
Balance Due			$.00

For assistance please contact Hemko via:
Email: support@planetreg.com

Please retain this confirmation for your records.

Should you wish to review your arrangements, click here to login.
Registration services provided by PlanetReg.

Tickets

Demonstration Event

June 25 - 27, 2015
9:00 AM
1043 Broadway
Boulder, CO

Register me
Harry Hemstreet
$1.00

:

The two codes are a QR cde and bar code. Both translate to the registrants ID number.

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Home > Event Home- Manage > Quick roster

Quick roster

The Roster Report is provided so you can view a list of all registrants and also has a link that allows you to download a delimited file of attendees.

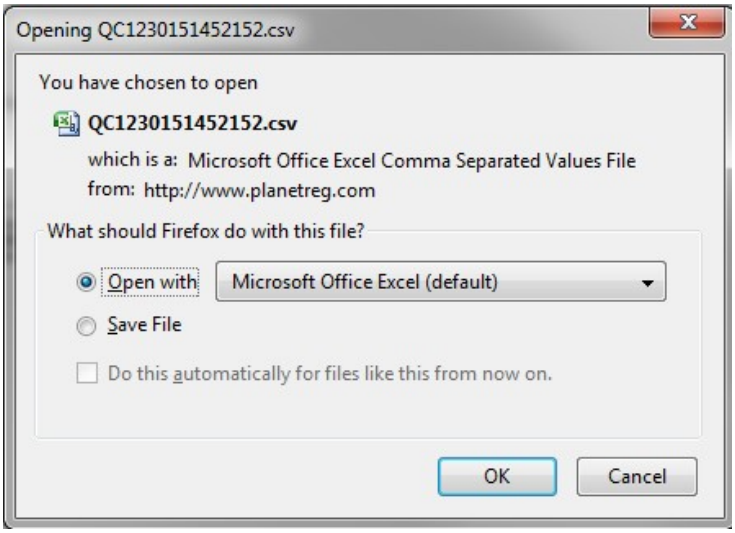
Click that link on the Event Home page to bring up your roster.

Quick Roster

Count	ID	Contact Email	Status	Name	Date	Registration
1	38665	hhemstreet@hemko.com	Test/Preview	**Harry Hemstreet**	10/30/2010	Regular member
2	38667	hhemstreet@hemko.com	Test/Preview	**Harry Hemstreet**	10/30/2010	Regular member
3	39985	hhemstreet@hemko.com	Test/Preview	**Harry Hemstreet**	11/7/2010	Regular member
4	40120	hhemstreet@hemko.com	Test/Preview	**Elizabeth Hemstreet**	11/8/2010	Regular member
5	57150	hhemstreet@hemko.com	Test/Preview	**Harry Hemstreet**	2/24/2011	Regular member

You can review individual registrations by clicking the underlined ID links.

You will also see the delimited file download link along with the name of the delimited file. If you click that link you will see this screen:



Your browser may be different. This is the download presentation in Firefox.

When you download the file, it can be downloaded as a plain text file (the Save file option), or you can download it directly into Excel. Downloading into Excel is the best option if you have Excel, but is not required.

The file in Excel looks like this:

	A	B	C	D	E	F	G	H	I	J
1	Event	Status	Contact ID	Contact Email	Registrant ID	Registration	Quantity	First Name	Last Nam	Nick Name
2	Abercrombie 2010 Family Reunion									
3		Test/Preview	22917	paul.sommers@gmail.com	22918	Adult	1	Paul	Sommers	Pauly
4		Test/Preview	22917	paul.sommers@gmail.com	22919	Adult	1	Karen	Sommers	Karen
5		Test/Preview	22917	paul.sommers@gmail.com	22920	Child (6-12), 5 and under free	1	Elly	Sommers	El
6										
7										
8										

That is just a partial display of the complete file. You should get all of your registration data in the Excel file.

Once you have saved the file as an Excel file on your own hard drive, you can use that file to produce your own reports. You can also use it as a Data file in Microsoft Word or most other word processing programs to produce letters, emails or merge to badges, name tents, etc.

Note that the csv file will be saved on the system for 48 hours only, so if you need the data, please keep a copy on your own system.

See Name Badges and Creating reports in Excel.

See also

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Preview registrations

The Preview registrations Report is provided so you can view a list of all registrants and also has a link that allows you to download a delimited file of attendees.

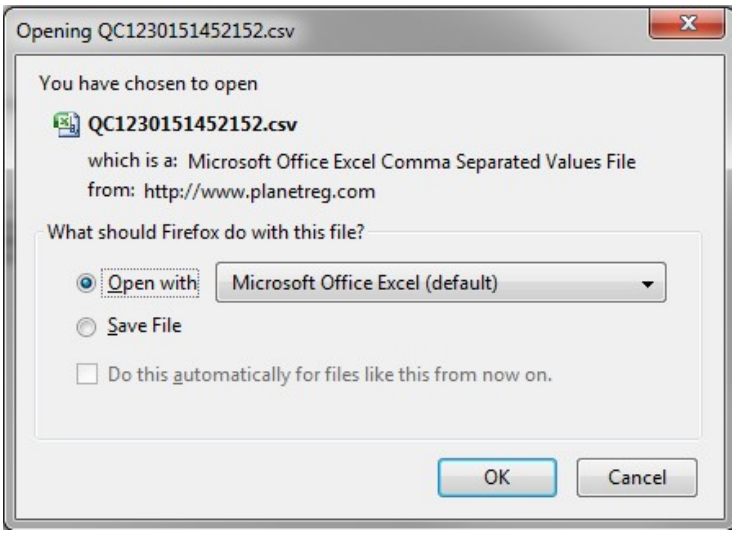
Click that link on the Event Home page to bring up your roster.

Registrations

Count	ID	Email	Status	Name	Date	Registration
1	685967	a.trimmer@hotmail.com	Active	**Adam Trimmer**	22/8/2013	Competitor
2	686210	trevor.driver@santos.com	Hold	**Trevor Driver**	22/8/2013	Competitor
3	687673	tdriver@adam.com.au	Active	**Trevor Driver**	24/8/2013	Competitor
4	688026	adam.d@internode.on.net	Active	**Adam Dimech**	25/8/2013	Competitor
5	699989	sjthiele@internode.on.net	Active	**Steve Thiele**	7/9/2013	Competitor
6	700981	oggyc68@hotmail.com	Active	**Chris Ogden**	9/9/2013	Competitor
7	702401	Mikhail_kul@hotmail.com	Active	**Mikhail Kuleshov**	10/9/2013	Competitor
8	707058	modonnell@thomsonslawyers.com.au	Active	**Michael O'Donnell**	13/9/2013	Competitor
9	707475	paradale@activ8.net.au	Active	**Norm Goodall**	13/9/2013	Competitor
10	709017	PHIL@JAQMINNS.COM.AU	Active	**PHIL JAQUILLARD**	14/9/2013	Competitor
11	709962	chrisw@worldwebms.com	Active	**Chris Weddle**	16/9/2013	Competitor
12	709977	roger.paterson@sportsmed.com.au	Active	**Roger Paterson**	16/9/2013	Competitor
13	710085	raycom@senet.com.au	Active	**Ray Pryor**	16/9/2013	Competitor
14	710371	dougm@sgi.com	Active	**Doug McPherson**	16/9/2013	Competitor
15	710557	Adam@harrissmokehouse.com.au	Active	**Adam Harris**	16/9/2013	Competitor

You can review individual registrations by clicking the underlined ID links.

You will also see the delimited file download link along with the name of the delimited file. If you click that link you will see this screen:



Your browser may be different. This is the download presentation in Firefox.

When you download the file, it can be downloaded as a plain text file (the Save file option), or you can download it directly into Excel. Downloading into Excel is the best option if you have Excel, but is not required.

The file in Excel looks like this:

	A	B	C	D	E	F	G	H	I	J
1	Event	Status	Contact IC	Contact Email	Registrant IC	Registration	Quantity	First Name	Last Nam	Nick Name
2	Abercrombie 2010 Family Reunion									
3		Test/Preview	22917	paul.sommers@gmail.com	22918	Adult	1	Paul	Sommers	Pauly
4		Test/Preview	22917	paul.sommers@gmail.com	22919	Adult	1	Karen	Sommers	Karen
5		Test/Preview	22917	paul.sommers@gmail.com	22920	Child (6-12), 5 and under free	1	Elly	Sommers	El
6										
7										
8										

That is just a partial display of the complete file. You should get all of your registration data in the Excel file.

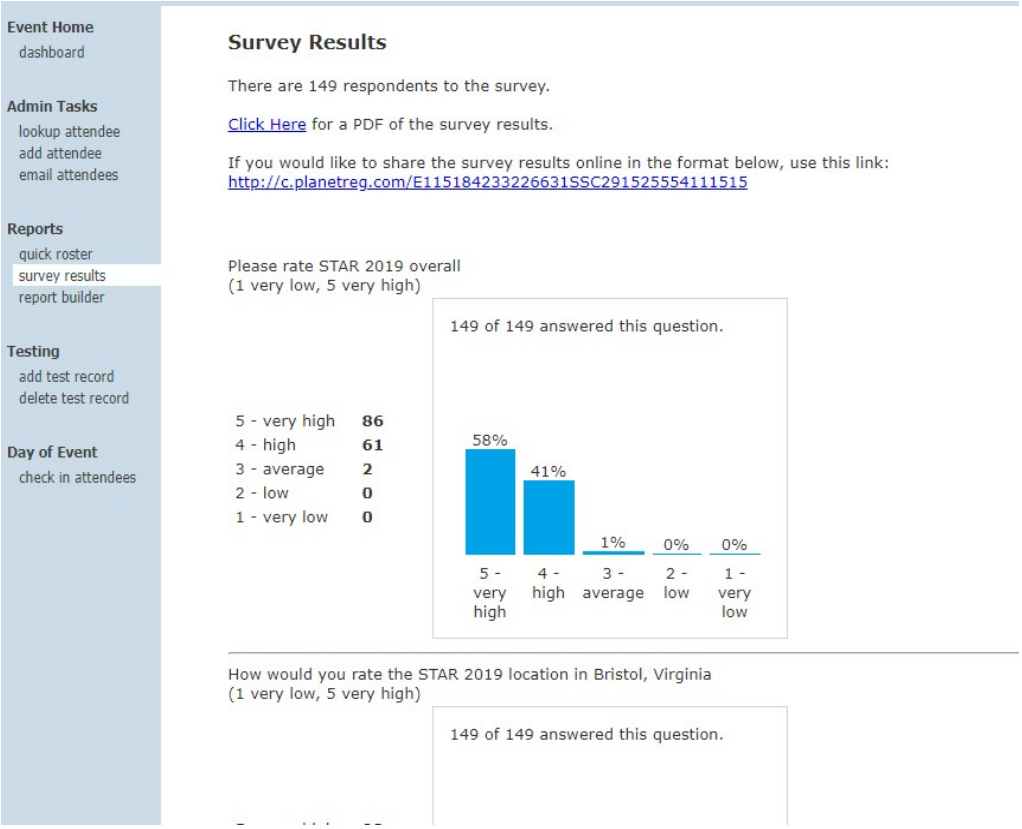
Once you have saved the file as an Excel file on your own hard drive, you can use that file to produce your own reports. You can also use it as a Data file in Microsoft Word or most other word processing programs to produce letters, emails or merge to badges, name tents, etc.

Note that the csv file will be kept on the system for 48 hours only, so if you need the data, please keep a copy on your own system.

See Name Badges and Creating reports in Excel.

Survey

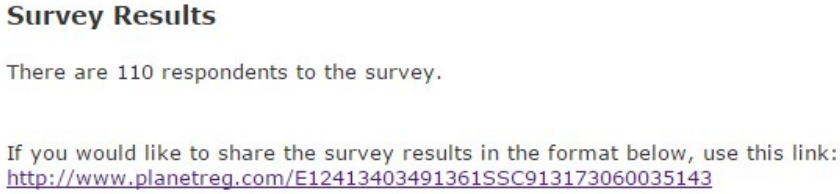
If you have emailed a survey and have had some returns, they will be displayed when you click this link:



When you click the Click Here for a PDF of the survey results, the system will create a PDF file which contains all survey results. If desired, this PDF can be shared with registrants via email.

You will also see links to display any textual data you may have gathered on your survey:

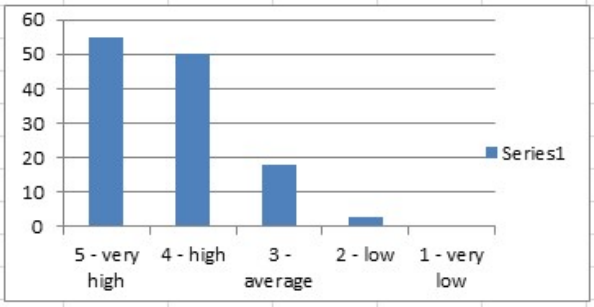
If you would like to share your survey results, you can use the link provided at the top of the page. You can email this link to all registrants or just to those who have administrative functions for your event. The display will include ONLY survey results and will not allow access to administrative functions:



If you would like to shorten that link, you can use a service like tinyurl.com, which will give you a very short version of the link.

It is also possible to replicate the graph by keying the data into Excel and having Excel build the graph:

Please Rate STAR 2014 Overall		
5 - very high	55	44%
4 - high	50	40%
3 - average	18	14%
2 - low	3	2%
1 - very low	0	
4 or 5		84%



If you do a quick roster, you will see that all of the survey questions are included in the Excel download. You can create specific Excel files with these responses by deleting all columns that are not relevant to the survey question.

Note - if you wish to send surveys to only a selected group of registrants, I.e. only those who are marked as attended - see Record attendance - you can simply copy the email from the survey, or compose your own and use the email attendees function - see Email Attendees - and condition the email to just include those who were marked as attended.

Be sure to NOT use the scheduled survey on the Setup/ Survey if you are going to be using this method. Email attendees also allows you to schedule your email to go out - i.e. send it 2 days after the event.

If you compose your own, be sure to use the merge field: **survey link: [surveyURL]** in the email so your registrants can click that link to go to the survey. Your Email Attendees would like this (this one just copies the survey email):

Email Attendees

Email Subject **Tell us how we did**

Compose your email

Source

Styles Normal Font Size

Hello,

I am seeking your assistance to gain feedback and comments about this event. As such, could you please take just a few minutes to offer your feedback by clicking on the link below:

Fill out the Survey

Regards,

body p

Merge Field Options

Send To

Only Contacts All Registrants

Only Checked In

You could also get even more specific on your email, by using an Excel download of registrant data (see Quick roster and/or Report builder) and remove rows of registrants you do not want to be included, then create an email in Word and do a mail merge.

The survey link is simply the event link followed by an underscore (_) followed by the registration ID.

See also

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Event status
Lookup attendee
Add attendee
Email Attendees
Event Tickets
Quick roster
Preview registrations
Add/ Delete test registrations

Report builder
Copy event
New event
Publish event

Add/ Delete test registrations

If you click the add test record, you will be directed to your registration form and will be able to add a registration in Test/Review status.

Note that test registrations consume inventory if you have any inventory controlled items.

When you remove/ delete test registrations, inventory is restored.

Please note that when you add records via add test record OR while your event is in preview mode, the PlanetReg fees will be calculated and shown. They will remain on the dashboard until you change the event status to open. You are never liable for fees shown while in test/ preview mode or when adding a test registration.

At some point you will probably want to delete your test registrations. Especially if your event had any inventory items. **Inventory is depleted by test registrations.**

There is a limit of 10 test registrations. If you need more than 10, just delete test registrations periodically and start again.

When you click the Delete test registrations action, you will see this screen:

Test Registrations

Check All	First	Last	Email	ID
		sommers	paul.sommers@gmail.com	22917
	Paul	Sommers	paul.sommers@gmail.com	22918
	Karen	Sommers	paul.sommers@gmail.com	22919
	Elly	Sommers	paul.sommers@gmail.com	22920
		O Conchuir	doncha@oconnor2010.com	23085
	Doncha	O Conchuir		23086
		O Giobúin	mairebheag@gmail.com	23087
	O Giobuin	Seosaimh		23088
		chan	cchan@gmail.com	23355
	Charles	Chan		23356
	Violet	Chan		23357
	Amy	Chan		23358

delete checked rows

You can click the Check All box to delete all test registrations or you can delete individuals by checking individual check boxes.

You can add test registrations at any time after your event is Open by using the Add test record link in the Manage/ Testing section.

See also

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Survey

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Copy event
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Publish event

Home > Event Home- Manage > Report builder

Report builder

The Report Builder has several sections:

Roster report - is an enhanced and selectable way to creat extracts and reports based on selection criteria. The Quick Roster on the dashboard includes all Active and Hold registrants without any opportunity to select based on other registrant criteria. The Roster report allows multiple selection options.

Financial Report - Provides 4 different types of financial reports.

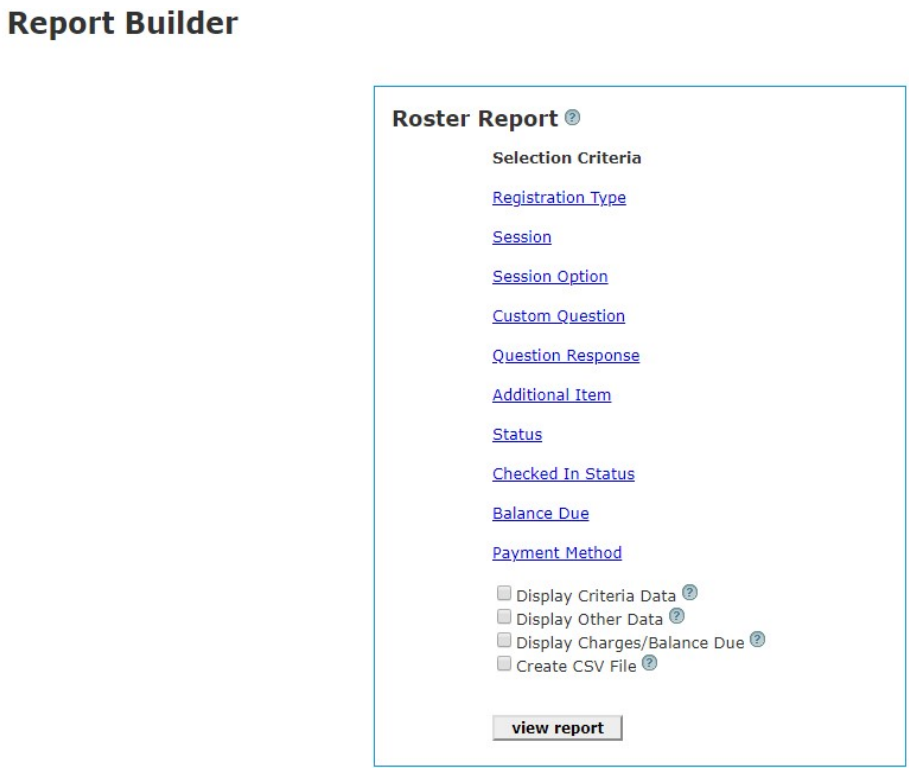
PDF Reports - provides PDF format reports that you can download and print.

> **Registrant Sign In** can be used as a hard copy sign in report for attendees,
> **Registrant Information Sheets** can be used by registrants at sign in to ensure that the registants know what they signed up for,
> **Registrant Waiver Sign In Sheets**, you can gather physical signatures on a Waiver form.

Event Config Reports - provides two types of definition reports.

> **Definition Report** - A technical report that identifes all components of an event definition.
> **Forms Report** - Produces PDF, downloadable images of the first page and questions page of an event. These PDFs can be shared among administartors for information purposes.

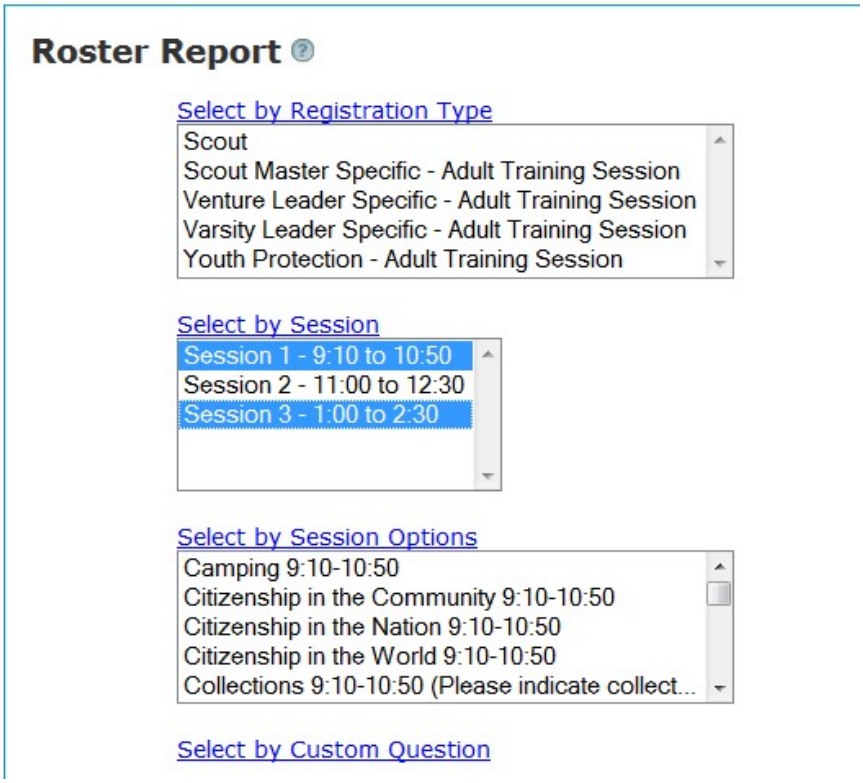
The Roster Report



You can create 'selective' rosters using this feature.

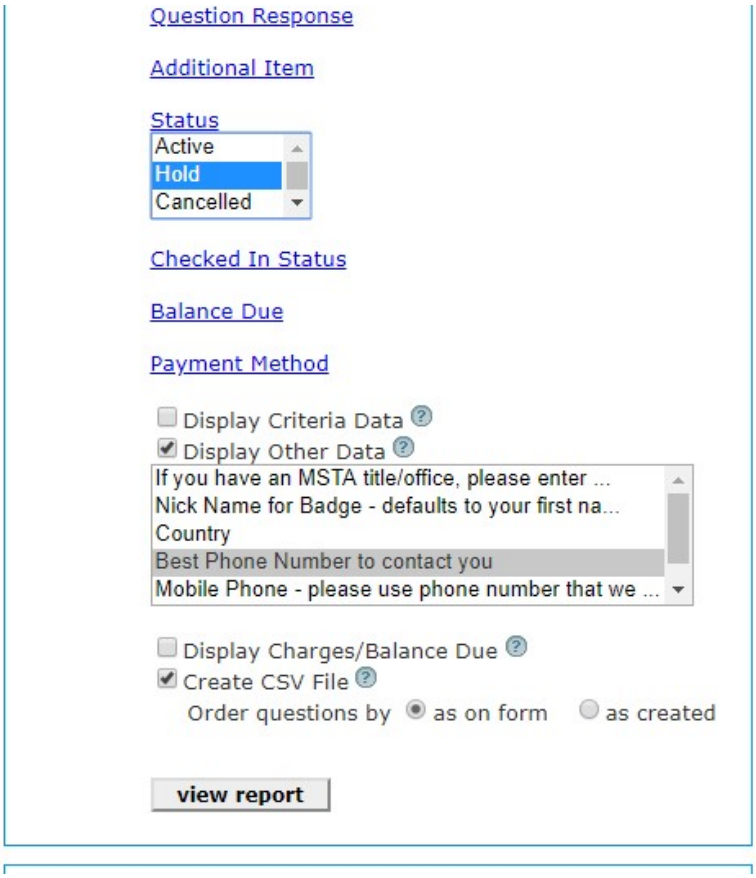
For example, if you need a list of only a specific registration type, status code, session or payment method, you can use this report builder to create an on screen list and/or a delimited file that you can use in Excel or similar.

You can select multiple items in each drop-down by holding the <ctrl> key as you click each item:



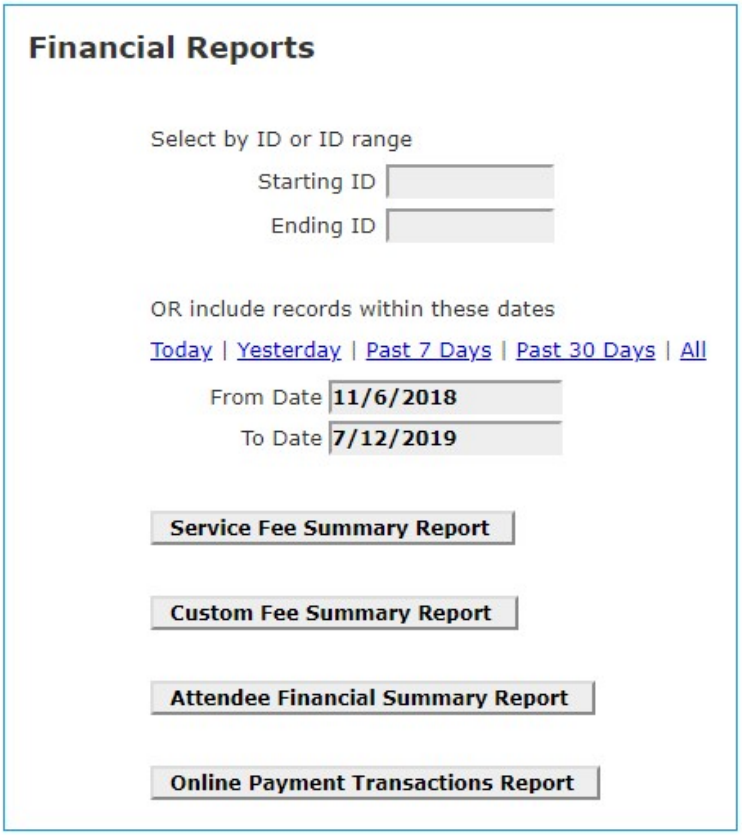
Unless you check the Create QC File box, you will just get an on screen list.

You can request that your selection criteria and/or additiopnal fields be displayed with the report by clicking the display criteria or Display other data data boxes:



This would create a report of registrants with Hold status along with their phone numbers. It would also create a CSV data file that could be downloaded to Excel or similar software.

There is a separate panel that can be used to create financial reports:



You can select to view the financial reports based on a date range or an ID number range.

The **Service Fee Summary Report** will list the selected registrants and show you the fee. The column labeled Registrant fee is the amount paid by the registrant. The column labeled Client Fee is the fee we collect from you. Usually they are the same if you are passing on your fee, or the Registrant fee would be zero if you are subsidizing the event fees.

Fee Summary

Event reporting: MSTA Star 2011

Transaction Dates reporting: 1/17/2010 1:59:26 PM - 5/3/2011 3:18:39 PM

Count	Name	ID Number	Status	Registrant Fee	Client Fee	Registrant Invoices	
1	Yeats	44817	Active	$1.00	$1.00	15619	$101.00
2	Cote	45005	Active	$1.00	$1.00	15680	$123.00
3	Brickner	45055	Active	$1.00	$1.00	15694	$148.40
4	Hemstreet, Jerry	45088	Active	$1.00	$1.00	15715	$137.00
5	Christopher	45170	Active	$1.00	$1.00	15755	$134.00
6	Parker	45239	Active	$1.00	$1.00	15781	$120.50
7	Karcher	45526	Active	$1.00	$1.00	15929	$121.00

The **Custom Fee Summary** report shows you the PlanetReg service fee and cancel fees by registration.

If you click the ID Number links, you will see a menu of items relating to that registration. If you click the Invoice ID you will see details of the registrants financials:

Client - Attendee Financials Review

ID Number **44817**
Name **Yeats**

Financials

Transaction ID	Description	Date	Amount
15619	Invoice	12/6/2010 5:49:17 PM	101.00
15622	Paypal Payment	12/6/2010 5:50:12 PM	(101.00)
Balance Due			.00

Transaction Details

ID 15619
ID number 44817
Event Code E114181628152
Trans Type Invoice
Trans Date 12/6/2010 5:49:17 PM
Amount $101.00
Tax $0.00

[close this window]

The **Attendee Financial Summary Report** will give you a report of invoices and payments received or credited to each individual registrant.

Attendee Financials

Event reporting: MSTA Star 2011

Transaction Dates reporting: 1/17/2010 1:59:26 PM - 5/4/2011 11:50:19 AM

ID Count	Name	ID Number	Status	Transaction ID	Transaction Date	Description	Amount
1	Yeats,	44817	Active	15619	12/6/2010 5:49:17 PM	Invoice	$(101.00)
				15622	12/6/2010 5:50:12 PM	Paypal Payment	$101.00
2	Cote,	45005	Active	15680	12/8/2010 8:47:51 PM	Invoice	$(123.00)
				16311	12/20/2010 3:49:15 PM	Check Payment	$123.00
3	Brickner,	45055	Active	15694	12/9/2010 2:23:42 PM	Invoice	$(148.40)
				15698	12/9/2010 2:26:05 PM	Paypal Payment	$148.40
4	Hemstreet, Jerry,	45088	Active	15715	12/10/2010 10:34:43 AM	Invoice	$(137.00)
				15718	12/10/2010 10:37:29 AM	Paypal Payment	$137.00
5	Christopher,	45170	Active	15755	12/12/2010 9:57:30 AM	Invoice	$(134.00)
				15758	12/12/2010 10:00:37 AM	Paypal Payment	$134.00
6	Parker,	45239	Active	15781	12/13/2010 9:09:12 PM	Invoice	$(120.50)
				15785	12/13/2010 9:12:15 PM	Paypal Payment	$120.50

Again, clicking the ID Number will direct you to details of an individual registrant, clicking the Transaction ID will lead you to details about that transaction:

Client - Attendee Financials Review

ID Number **44817**
Name **Yeats**

Display all financials for this ID

Transaction Details

ID 15619
ID number 44817
Event Code E114181628152
Trans Type Invoice
Trans Date 12/6/2010 5:49:17 PM
Amount $101.00
Tax $0.00

The **Online Payment Transaction Report** lists all registrants who paid via an on-line medium - i.e. Paypal and credit cards.

Event reporting: MSTA Star 2019
Payment Transaction Activity Dates reporting: 11/6/2018 - 7/12/2019

Count	Name	Event	ID Number	Status	Internal ID	Trans Date	External ID	Description	Amount
1	Villarose, Dennis	MSTA Star 2019	2820433	Active	1446063	1/31/2019	8U319929DF7115335	Paypal Payment	$176.00
2	Park, Jim	MSTA Star 2019	2820500	Active	1446093	1/31/2019	9T978340XT5094532	Paypal Payment	$291.00
3	Mogavero, Patrick	MSTA Star 2019	2820530	Active	1446106	1/31/2019	3GR4026372190721D	Paypal Payment	$89.50
4	Hemstreet, Harry	MSTA Star 2019	2822573	Active	1447273	2/3/2019	89J22313030275244	Paypal Payment	$176.00
5	White, Roger	MSTA Star 2019	2823049	Active	1447575	2/4/2019	9DV1024167735183G	Paypal Payment	$170.00

PDF Reports

PDF Reports

Registrant Sign In Sheet

Registrant Information Sheets

Registrant Waiver Signature Sheets

Produce reports as described in a PDF format which can be downloaded and printed.

Event Config Reports

The Definition Report is a technical report of event components.

The Forms Report allows you to create PDF versions of your opening page and questions page for sharing an editing by event adminsitrators.

See also

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Display detailed counts
Event status
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Email Attendees
Event Tickets
Quick roster
Preview registrations
Survey
Add/ Delete test registrations
Copy event
New event
Publish event

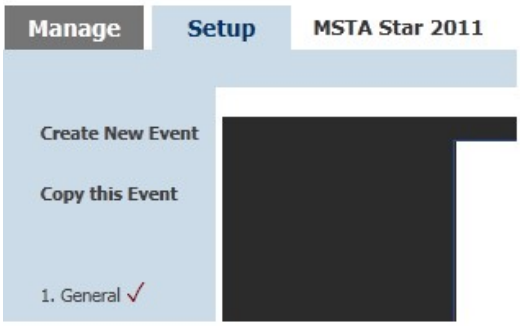
Home > Event Home- Manage > Copy event

Copy event

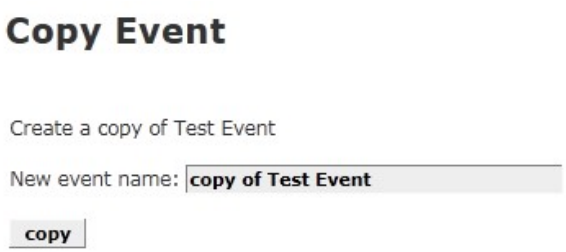
There are a few steps required when you copy your event.

Let's assume that you want to keep the general format of an event, but want to copy it to set up a new version with a different name and date.

Start by selecting the event from your event list, select the Setup tab and click the Copy this event link:

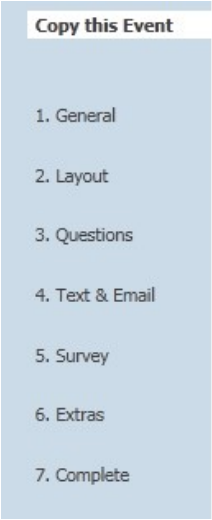


When you click that link, you will see this screen:



Note that the New event name says copy of... you should change that to whatever you will be naming the new event.

When you click the copy action, your event will be copied and you will be asked to step through the Setup steps in the same way as a new event.



Be sure to make any changes needed for the new event as you step through the event definition.

See also
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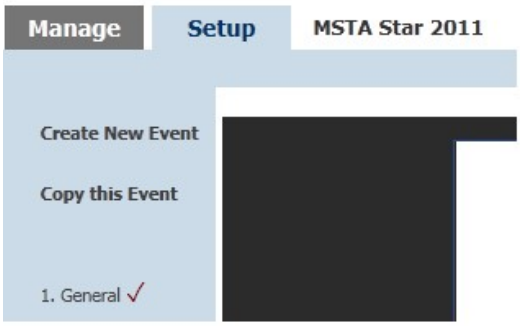
Home > Event Home- Manage > New event

New event

When you are ready to create a new event, you can start from any existing event - expose the Setup tab:



When you click the create new event, you will get the same screen that was used to begin your first event:

Fill out the form below to start creating your event. This first step is the only one that is required. If you are in a hurry, you can skip through the other steps and return later to make changes to your event.

Create a New Event

Event name

What are you selling? registration

Will you be collecting money? yes no

Event Starts April 28 2011

Event Ends April 30 2011

Timezone (GMT -7:00) Mountain Time (US & Canada)

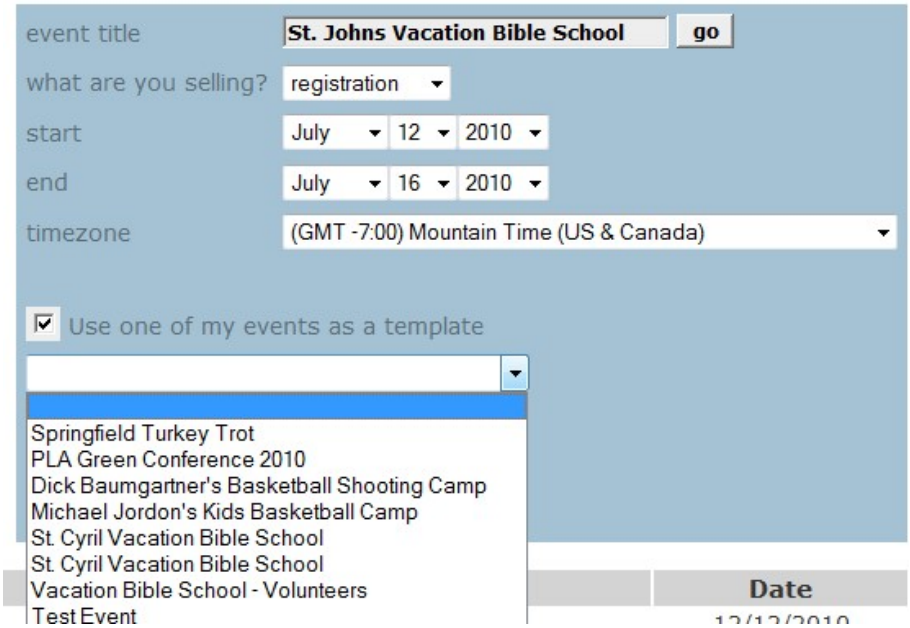
Use one of my events as a template

Enter your event name/ title. You can select the type of items that, for example registration, that you will be selling for your event. If you don't see what you are selling, just pick the 'other' choice and you will be given the opportunity to enter your own text.

This data - what you are selling - can be changed at any time on the Form screen (Edit Form).

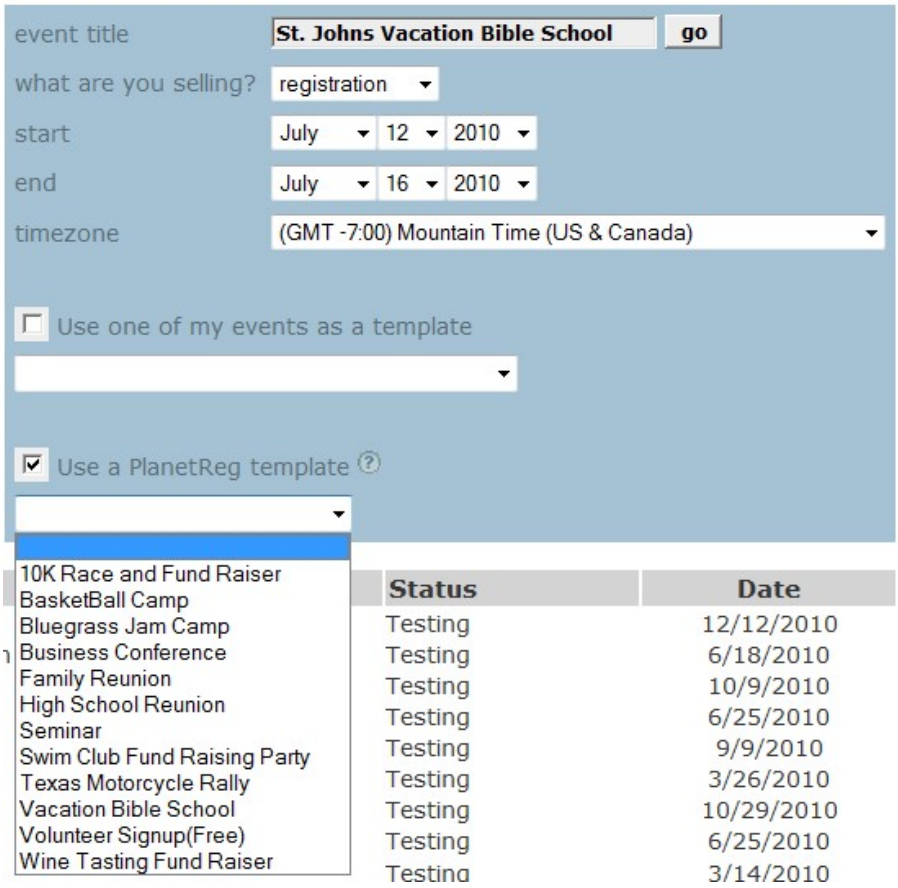
Select the start date and end date for your event.

You may also select to use one of your previously defined event as a template for your new event:



To do this, click the check box and use the drop down list to select one of your events. This can save a lot of time as most of the data will be copied over to the new event.

You can also use a pre-defined template to start your definition:



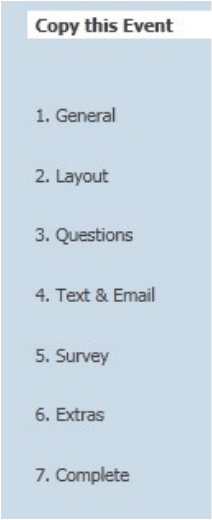
You will notice that there is a small question mark next to the work template. If you click on this question mark, you will see a list of PlanetReg templates and their example events in a new window.

We often add new templates for your use.

If you copy from a template, you will need to edit both the form and questions to correspond to your event.

The time zone is relevant to the end date and time for your event. You will have the opportunity, later in the set up of your event, to set an end date and time with regard to accepting registrations for your event.

You will be asked to step through the list of event setup steps for your new event:



See also

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Publish event

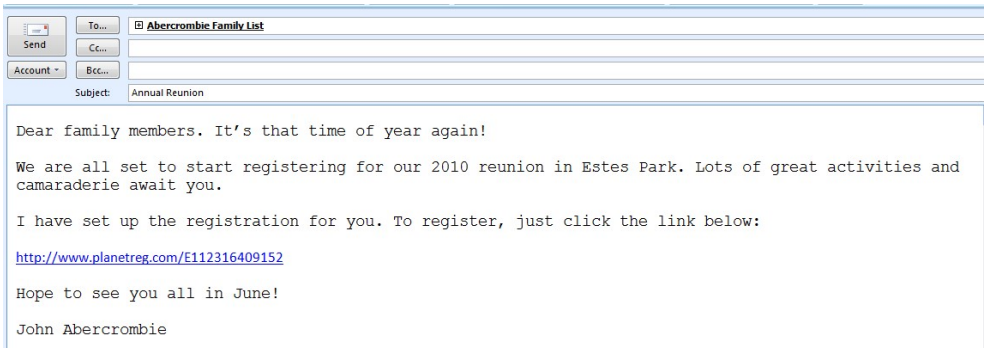
Publish event

Once you have checked everything, done your event preview, you are ready to open your event (see Event status) and publish it.

You can publish in an email or on your own web site. The Event Home page displays the URL for your event:

Event Link:
http://www.planetreg.com/E112316409152

To publish in an email, you can just copy the link:



To publish on your web site, you can just copy the link and post on a web page, or you can copy this little HTML snippit which will display as an underlined link on your web page:

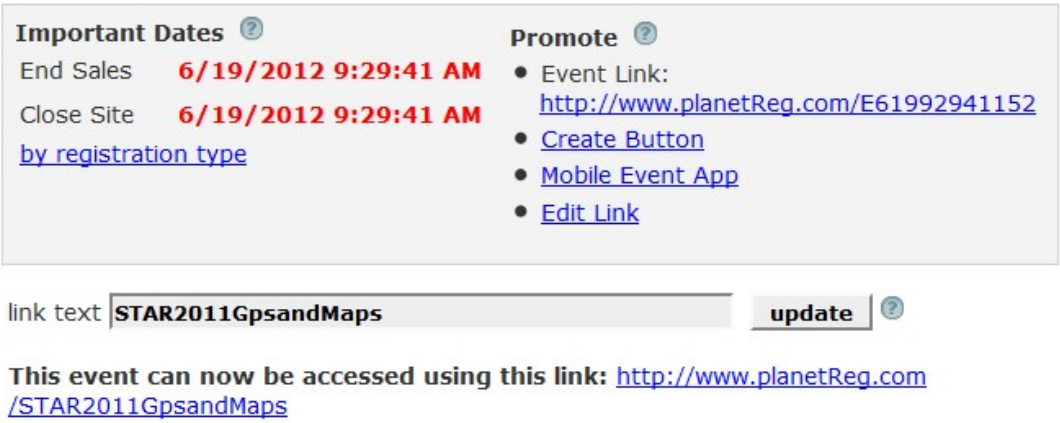
register now

This will show up on your web page as:

register now

When an attendee prospect clicks this link, the registration screen will be displayed in a new window.

You may also use the Create Button link to produce html code for your web site:



If you would like a personalized link for your event, click the Edit Link option and you can enter your own event description. This personalized link must be unique throughout our system, so it is a good idea to make sure your link is individualized. If you use the same link from year to year, you must erase previous usage before re-using it.

You may use spaces in the link as well as some special characters: .~- !@$^&*()[]?=

So that link could be ***STAR 2011 Gps and Maps***

End

You may change the Link Text to anything you wish. Whatever you key will be displayed on the face of the button.

When you click next, you will be presented with this panel:

www.planetreg.com/admin/buttonPop2.asp

Copy and paste the script below into a web page to display the button:

```
<!--BEGIN PLANETREG BUTTON CODE!-->
<link rel="stylesheet" type="text/css" href="http://www.planetReg.com/admin
/PRbutton.css" />
<div id="button1" class="RBtnTab" >
<a href="http://www.planetReg.com/E11515821152">
<span>Register</span></a>
<div class="PR">
<a href="http://www.planetReg.com" class="PRa">online event registration</a>
<br><a href="http://www.planetReg.com" class="PRa">by PlanetReg</a>
</div></div>
<!--END PLANETREG BUTTON CODE!-->
```

close

Using the button with WordPress?

The displayed text should be copied and pasted into your web application.

If your web site is built using WordPress, there is a special plug in you will need for this button to display properly:

Mozilla Firefox

www.planetreg.com/admin/buttonPop_WP.asp

WordPress usually adds miscellaneous html tags to the button code which causes the button to display improperly. To fix, use the following WordPress plugin:
http://www.simonbattersby.com/blog/plugin-to-stop-wordpress-adding-br-tags/

To install, download the plugin zip file by clicking the icon half way down the page, upload into your WordPress plugins folder and activate.

close

End
IF SKIN mbm

http://console.mybookingmanager.com/admin/buttonPop_WP.asp

WordPress usually adds miscellaneous html tags to the button code which causes the button to display improperly. To fix, use the following WordPress plugin:
http://www.simonbattersby.com/blog/plugin-to-stop-wordpress-adding-br-tags/

To install, download the plugin zip file by clicking the icon half way down the page, upload into your WordPress plugins folder and activate.

close

.

Other Management tasks

Articles in this section

See also

Basic vs Pro Mode

PlanetReg now has two modes of operation (This change will be effective 11/1/2019).

If your event is not free, i.e. has registrant fees, or you are using PlanetReg with 'ads off' for a free event, you will see no changes. The primary change is only with free events where ads are left on.

Basic mode is free - there is no charge to use Basic mode, however there are limitations:

1. The event is limited to 40 registrants per event.

2. There will be Google ads on your registration page.
3. Your event must be free to registrants.
4. You can only have one Basic mode event operating at one time.
5. Many of the advanced features in PlanetReg are **not available** in Basic mode:
    a. Multiple registration types
    b. Sessions
    c. Survey
    d. Automatic email reminder (you can still do this manually).
    e. Ticket feature
    f. Google Map
    g. Ability of the registrant to change or cancel on their own
    h. Auto Register (skips the first page and starts with the questions page)
    i. Add to Calendar
    j. Only one Basic mode event can be open at one time.
    k. Phone and Email support are still included

Considerations

All events are created in Pro mode, but you can change that.

If you think you will fit in the basic mode, define your event, and make sure you set the **mode switch for the event to Basic. This switch is located in the Setup / General panel.**

Make some test registrations to see that your event does everything you need.

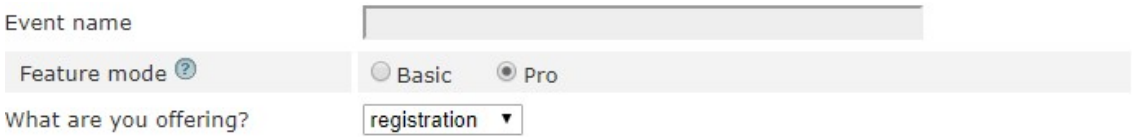
If you determine that your event will not perform correctly in Basic mode, **change the Pro/ Basic switch back to Pro mode**.

Pro mode has a minimum charge of $.50 (fifty cents US$) per registrant.

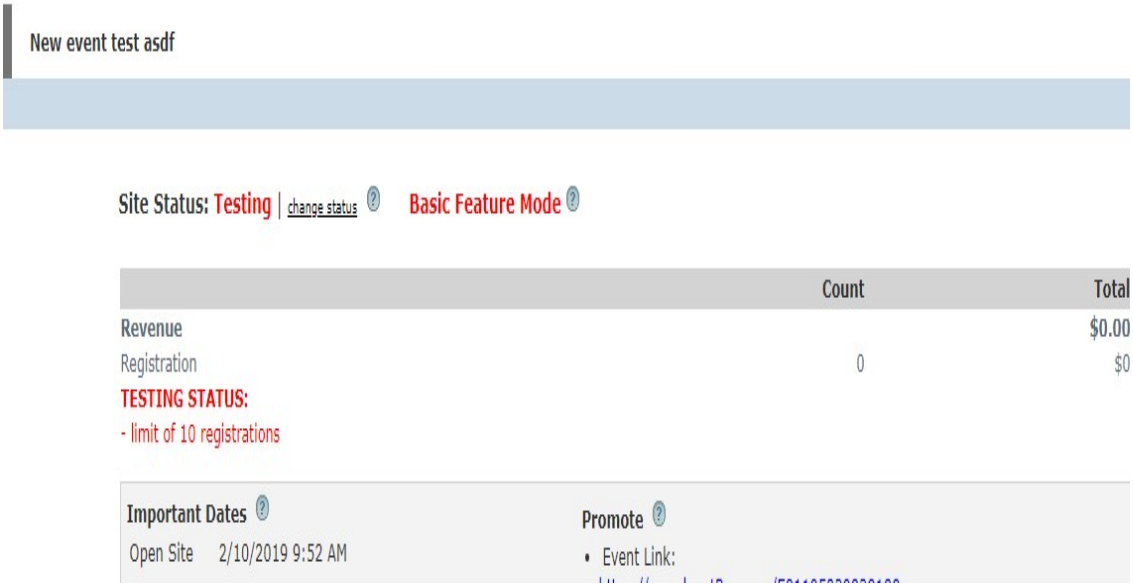
1. There is no limit to the number of registrants
2. No Google ads
3. The event can be **either free or priced**. If the event is priced, there is a charge $.50 per registrant plus 2% of the checkout amount. If your event is priced at $100.00 per person, your fee would be $2.50 (.2 X 100.00 + .50) – with a maximum $9.00 per checkout. If the event is free there is a charge of $.50 per registrant.
4. We will either help you build your form, or build it for you at no charge.
5. **All features and functions are available**, including Multiple Registration Types, Sessions, Additional Items, Surveys, Partial Payments, Tickets, etc.
6. Phone and Email support is included.

Pro Mode is the default mode.

You can set the mode for any event by changing the radio button for mode on the General tab in Setup:



Once you have changed an event to Basic mode, you will see this display on the dashboard:

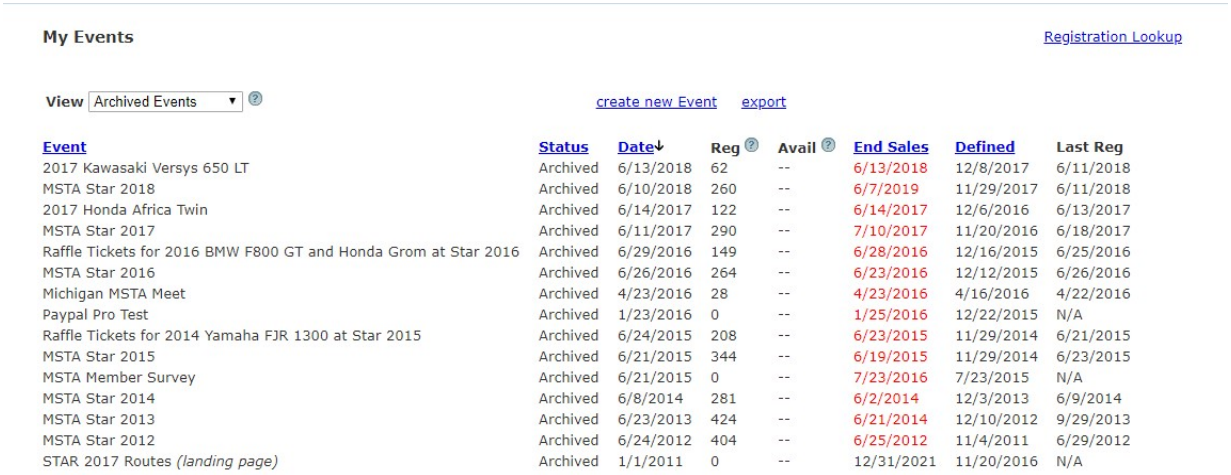


Multiple Events: Lookup Attendee and ME Reports

When you log into your account, you will be presented with a list of events. That list will depend on what you have selected in the View drop down.

If you would like to search a subset of events for a registrant:

1. Expose the subset of events using the View drop down. In this case we are exposing all Archived events



My Events

Registration Lookup

View Archived Events

create new Event export

Event	Status	Date	Reg	Avail	End Sales	Defined	Last Reg
2017 Kawasaki Versys 650 LT	Archived	6/13/2018	62	--	6/13/2018	12/8/2017	6/11/2018
MSTA Star 2018	Archived	6/10/2018	260	--	6/7/2019	11/29/2017	6/11/2018
2017 Honda Africa Twin	Archived	6/14/2017	122	--	6/14/2017	12/6/2016	6/13/2017
MSTA Star 2017	Archived	6/11/2017	290	--	7/10/2017	11/20/2016	6/18/2017
Raffle Tickets for 2016 BMW F800 GT and Honda Grom at Star 2016	Archived	6/29/2016	149	--	6/28/2016	12/16/2015	6/25/2016
MSTA Star 2016	Archived	6/26/2016	264	--	6/23/2016	12/12/2015	6/26/2016
Michigan MSTA Meet	Archived	4/23/2016	28	--	4/23/2016	4/16/2016	4/22/2016
Paypal Pro Test	Archived	1/23/2016	0	--	1/25/2016	12/22/2015	N/A
Raffle Tickets for 2014 Yamaha FJR 1300 at Star 2015	Archived	6/24/2015	208	--	6/23/2015	11/29/2014	6/21/2015
MSTA Star 2015	Archived	6/21/2015	344	--	6/19/2015	11/29/2014	6/23/2015
MSTA Member Survey	Archived	6/21/2015	0	--	7/23/2016	7/23/2015	N/A
MSTA Star 2014	Archived	6/8/2014	281	--	6/2/2014	12/3/2013	6/9/2014
MSTA Star 2013	Archived	6/23/2013	424	--	6/21/2014	12/10/2012	9/29/2013
MSTA Star 2012	Archived	6/24/2012	404	--	6/25/2012	11/4/2011	6/29/2012
STAR 2017 Routes *(landing page)*	Archived	1/1/2011	0	--	12/31/2021	11/20/2016	N/A

When you click on Registration Lookup

You will be able to key a lookup variable and it will perform that lookup on all of the items in that view. An example - looking up by last name, this lookup will include all instances of that last name in Archived events:

Registration Lookup

First Name
Last Name **Hemstreet**
Email
Company Name
Phone Number
Invoice Number
ID Number

search Reset

ID Number	Last	First	Email	Status	Address	City	ST/Prov	Event
1752423	Hemstreet		hhemstreet@hemko.com	Active				Raffle Tickets for 2
1752424	Hemstreet	Harry	hhemstreet@hemko.com	Active	5560 Stone Church Court	Loveland	Colorado	Raffle Tickets for 2
1821562	Hemstreet		jerrymickey@cs.com	Active				Raffle Tickets for 2
1821563	Hemstreet	Jeremiah	jerrymickey@cs.com	Active	1712 Grommon Rd	Naperville	Illinois	Raffle Tickets for 2
2476865	Hemstreet		hhemstreet@hemko.com	Deleted				2017 Kawasaki Ver
2476866	Hemstreet	Harry	hhemstreet@hemko.com	Deleted	5560 Stone Church Court	Loveland	Colorado	2017 Kawasaki Ver
2527652	Hemstreet		hhemstreet@hemko.com	Active				2017 Kawasaki Ver
2527653	Hemstreet	Harry	hhemstreet@hemko.com	Active	5560 Stone Church Court	Loveland	Colorado	2017 Kawasaki Ver
164837	Hemstreet		hhemstreet@hemko.com	Deleted				MSTA Star 2012
164838	Hemstreet	Harry	hhemstreet@hemko.com *(contact)*	Deleted	5560 Stone Church Court	Loveland	Colorado	MSTA Star 2012
164839	Hemstreet	Beth	hhemstreet@hemko.com *(contact)*	Deleted	5560 Stone Church Court	Loveland	Colorado	MSTA Star 2012

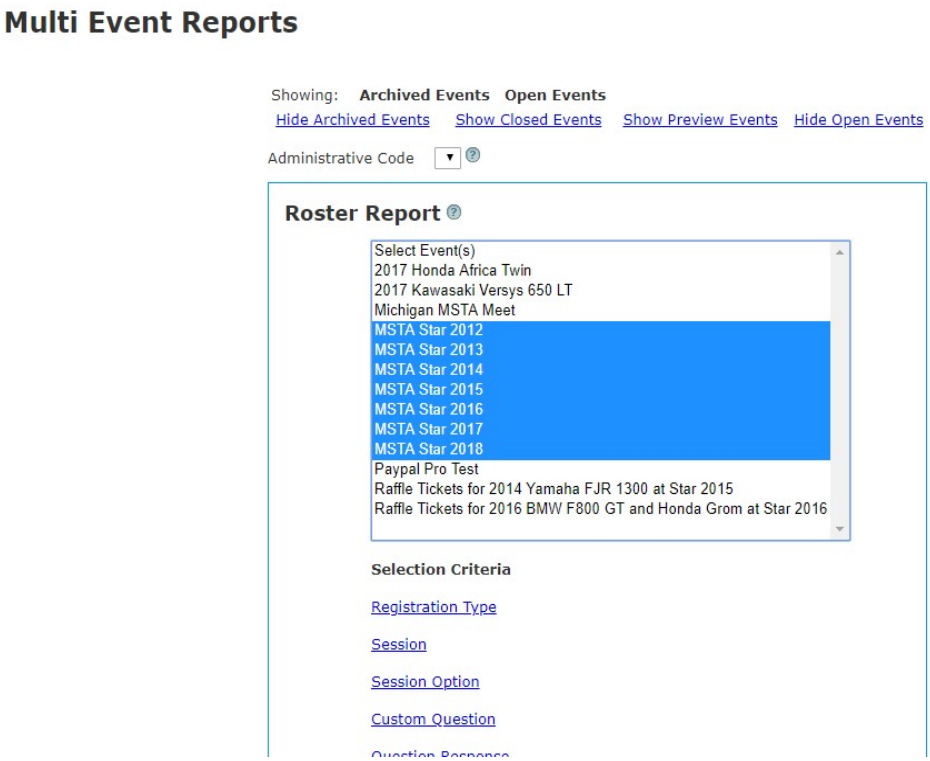
If you click on 'My Account' while on initial page after you login, there is a new type of report - **Multiple Event Reports**.

Account Reports
financial review
fee summary
attendee financials
Multiple Event Reports

Last Name
Login Email
Organization Name
Website
Phone
PayPal Email Address

If you click on the Multiple Event Reports link, you will be presented with a dialouge that allows you to list events of with a specific status - like Archived, Preview, Open, Etc.

Once you have the subset of events exposed, you can Ctrl click on the events you would like to incude in the report. As you hold the Ctrl key and click on each event, it will be highlighted.



Once you have selected the target events, you can then use the **Selection Criteria** items to select what will be included in your extract/ report. Note that the effect of selecting multiple criteria is a logical AND - each selection made must be satisfied to have the record extracted/ displayed.

See also

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Home > Other Management tasks > Attendee maintenance

Attendee maintenance

You can use the quick roster or you can look up an individual using the lookup attendee link on the manage tab.

Once you have retrieved a registrant, you will be shown this screen:

Client - Review Registration

ID	Status	Name
38665	Test/Preview	Harry Hemstreet

Display Financials

View Confirmation

Send Confirmation

Enter a Payment/Refund/Credit

Update Status

Update Contact/Attendee Information

Cancel this registration

Once you have retrieved a registrant, you will be shown this screen:

There are several actions that you can initiate from this screen.

Display Financials:

ID	Status	Name
38665	Test/Preview	Harry Hemstreet

Financials

Transaction ID	Description	Date	Amount
13962	Invoice	10/30/2010 10:45:51 AM	31.00
13964	Paypal Payment Initiated	10/30/2010 10:45:52 AM	(31.00)
Balance Due			31.00

View Confirmation

Allows you to view an attendee confirmation screen.

Send Confirmation

Allows you to email a new confirmation to an attendee.

Enter a Payment/Refund/Credit

Allows you to add a financial transaction to an attendee record. When you click that button, you will be shown this screen:

ID	Status	Last Name
22917	Test/Preview	sommers

Financials

Transaction ID	Description	Date	Amount
6078	Invoice	11/30/2009 4:40:31 PM	$148.63
6128	Check Payment	12/1/2009 5:15:55 PM	($10.00)
6129	Check Refund	12/1/2009 5:16:32 PM	$10.00
6289	Paypal Payment	12/22/2009 11:18:53 AM	($148.63)
Balance Due			$.00

Transaction Type Please Select

Amount

Add Financial Record

You can add attendee checks, refunds, etc. Select the transaction type from the drop down list, enter the transaction amount in the Amount box and click the Add Financial Record button.

Update Status

You can update attendee status with this action. When you click the button, you will be shown this screen:

ID	Status	Last Name
22917	TEST/PREVIEW	sommers

Update Status to ACTIVE

Cancel this registration

Since this registration is the TEST/PREVIEW mode, you can update it to ACTIVE or you can cancel the registration. In cases where you have multiple individuals attached to a registration, you can cancel individuals with this function.

Update Contact/Attendee Information

Clicking this button allows you to change certain information for an attendee. You will be shown this screen:

ID: **94849**

Reg Type	Guest ($.00)
First Name	
Last Name	
Nickname for badge - defaults to your first name	
Address	**5560 Stone Church Court**
Address Line 2	
City	**Loveland**
State/Province	Colorado
Country	Zimbabwe
Zip (Postal Code)	**80537**
Home Phone	
MSTA Member # (if known)	

Regular member ($40.00)
Sustaining/Life member ($36.00)
Guest ($.00)
Member of Household where Primary member is a Regular Member ($40.00)
Member of Household where Primary member is a Sust ($36.00)

Custom Questions

Emergency Contact name	
Emergency Contact Phone Number	
I am interested in Dual Sport riding at STAR	☐ Yes
I will require printed route maps	☐ Yes
If you are ordering a lunch ride ticket, please indicate your sandwich type	○ Ham ○ Turkey ○ Cheese ○ Peanut butter and jelly

Update this record

You can change any of the items shown. Note that if you have multiple attendees on the same registration, you can change each. After a change, you must click the Update this record button.

If you update priced items (additional items) and a difference in the invoice amount is perceived, you will be shown the difference as either a balance due or a refund due:

Financials

Transaction ID	Description	Date	Amount
15715	Invoice	12/10/2010 12:34:43 PM	$137.00
15718	Paypal Payment	12/10/2010 12:37:29 PM	($137.00)
136830	Reverse Invoice	11/29/2012 4:07:51 PM	($137.00)
136831	Invoice	11/29/2012 4:07:51 PM	$163.00
Balance Due			$26.00

In the above example, the registrant owes an additional $26.00.

You should use the **send confirmation** button to dispatch a new confirmation/ invoice to the registrant.

The registrant can retrieve their record:

> Please save this email and note your ID number.
> Should you wish to review your arrangements, click here to login.

and make a payment using any of the payment methods that you allow.

If a refund is due, it is up to the organizer/ administrator to handle the refund.

Pressing this button allows you to cancel the registration shown.

See also

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Multiple Events: Lookup Attendee and ME Reports
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My account settings
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Name Badges

At some point in your event processing, you will probably wish to do name badges.

To begin, you should ask for a Roster report and download the QC (Quote and Comma delimited) file to your own system.

After downloading, save the file as an Excel file. That is usually the default format when you ask for a download.

See Quick roster

After downloading and saving the file, use a word processing program, such as Microsoft Word to create your

badges.

You can find badge stock and holders at you local office supply store.

Almost all word processors have a built in wizard for producing merged labels or badges.

We have a sample - using Microsoft Word:

See also

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Home > Other Management tasks > My account settings

My account settings

At the top right of Event Home page, you will see these links:

my events | my account | help

Click the my account link and you will be shown this screen:

My Account

First Name	Harry
Last Name	Hemstreet
Login Email	support@planetreg.com
Password	••••••••••••
Organization Name	PlanetReg
Website	970-667-0517
Phone	970-667-0517
PayPal Email Address	paypal@planetreg.com
Business Number	
Financials Details	
Accounts Person Name	
Phone	
Email	
Address	
Street	
City	
State	
ZIP/Postal Code	
Country	

update

You can update relevant details of your account.

At the bottom of the my account screen, you will see:

User List | **Add User**

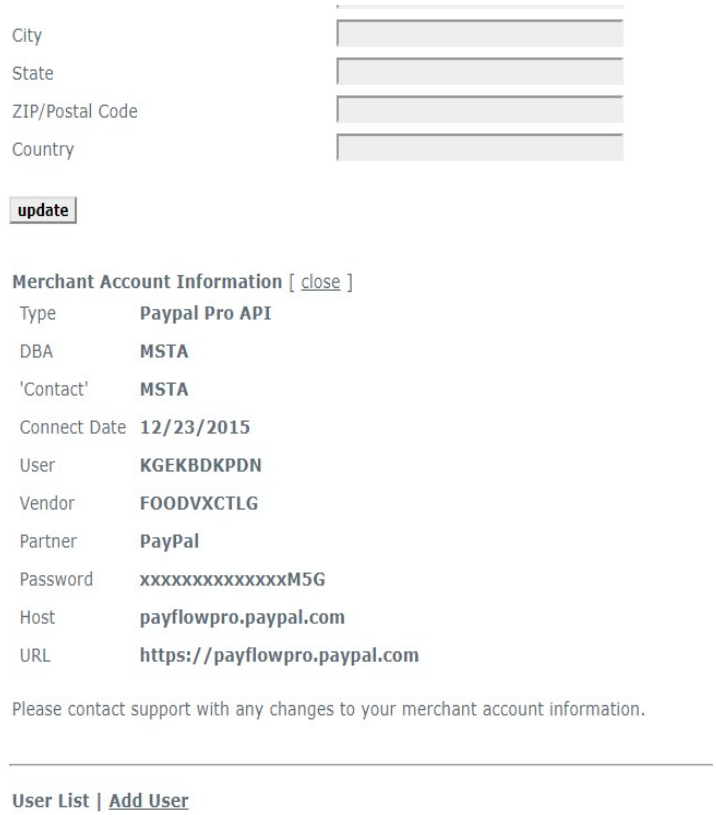
John Abercrombie	johna938Vw4@hotmail.com	(administrator)
Mabel Abercrombie	mabel.abercrombie@gmail.com	edit | delete

If you wish to share your administration of your site, you can add additional users.

Only the primary administrator can delete users.

If you have a separate accounting contact, you may enter that in the Financials Details section. That email address will be the recipient of invoices.

You can display your Merchant Account information on this page, by clicking the link right below the update button:



This is only applicable if you are **using anything other than the standard Paypal** account to collect your payments.

See also

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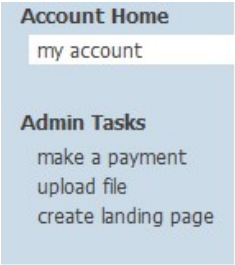
Home > Other Management tasks > Create landing page

Create landing page

For certain registration situations, you may need or desire to present your attendees with a single page that can direct a user to multiple individual events. Of course you can do this quite easily if you have your own web site and the capability to accomplish this.

You may also do it by creating what we call a 'Landing Page'. This is a special event that has only a single page - (identical to the Layout page). The single page will have an event code of its own so you can insert the event link into your web site or in an email.

You can access the Landing Page facility by clicking on the my account link in the upper left corner of your screen. You will see this display on the left panel:



Click the create landing page link and you will be asked for the name of your Landing Page:

Once the page is created you will be presented with a single page/ form with **some** of the functionlaity of the normal 'Layout' page. You will not see registration types and only a single text input area. You can upload your logo or hide that section, you can enter **when** and **where** data if applicable, or just hide them.

The text below will show you how to create a landing page that is suitable for most purposes, however please check out:

Dynamic event display on landing page
Which provides an alternate method of inserting links on your landing page. It is especially appropriate for users who have repeating / periodic events.
Your next task is to insert text and links to the events you are supporting - a typical landing text might look like this. In this case we have a summer camp with several opportunities for staff to qualify for specialized training:

Listed below you will find links to all of the 2011 Kirkwood Camp Certification programs.

To register for a program, simply click on the link and a form for that program will be presented. Each program has further details regarding course content when you click the link. If you wish to register for more than one program, register for each separately.

Meals and Lodging - where appropriate are included in the program price.

Programs:

High Ropes, June 18-19, $325.00 per person, 9:00 am to 5:00 pm each day.

Register for High Ropes

Low Ropes, June 17, $150.00 per person, 9:00 am to 5:00 pm

Register for Low Ropes

Challenge Out Lifeguarding, June 26, $100.00 per person, 1:00 pm to 6:00 pm
You must have prior certification in lifeguarding - issued within the last four years.

Register for Challenge Out Lifeguarding

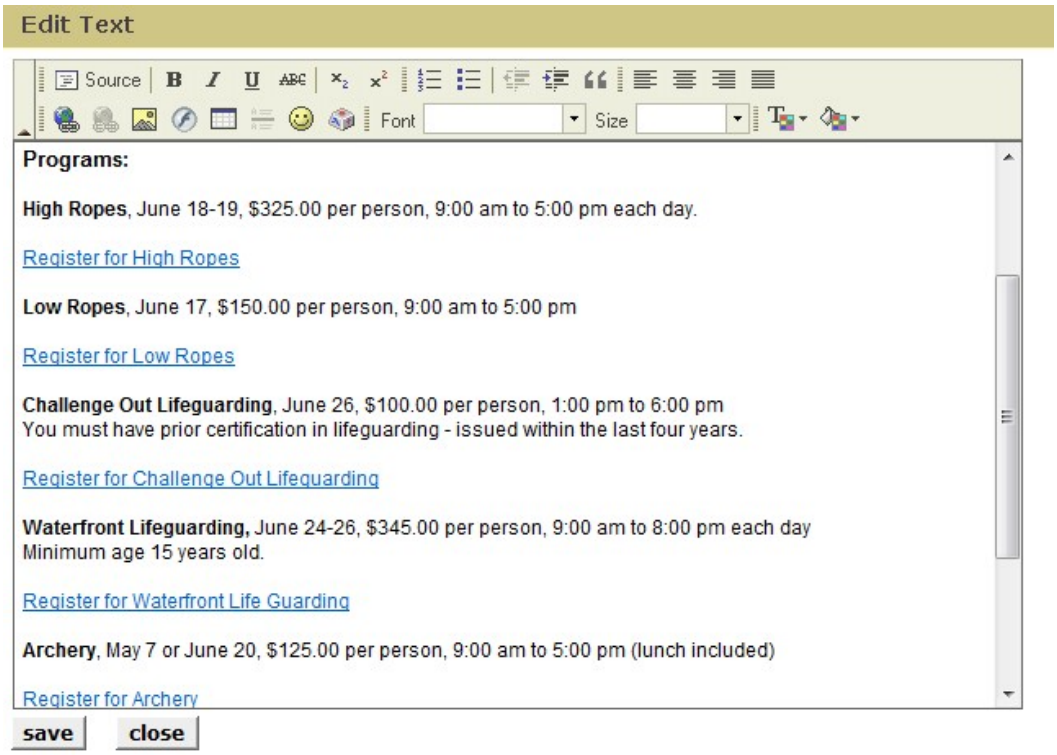
Waterfront Lifeguarding, June 24-26, $345.00 per person, 9:00 am to 8:00 pm each day
Minimum age 15 years old.

Register for Waterfront Life Guarding

Archery, May 7 or June 20, $125.00 per person, 9:00 am to 5:00 pm (lunch included)

Register for Archery

All of the text and links are inserted into the single text area of the form:

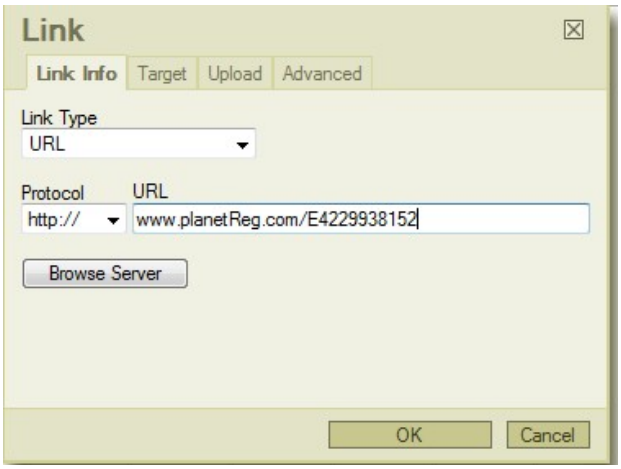


The underlined / blue text represent links to your list of events. To insert a link into your text, you can use the link icon in the Edit text commands:

That is the small globe with a chain link under it.

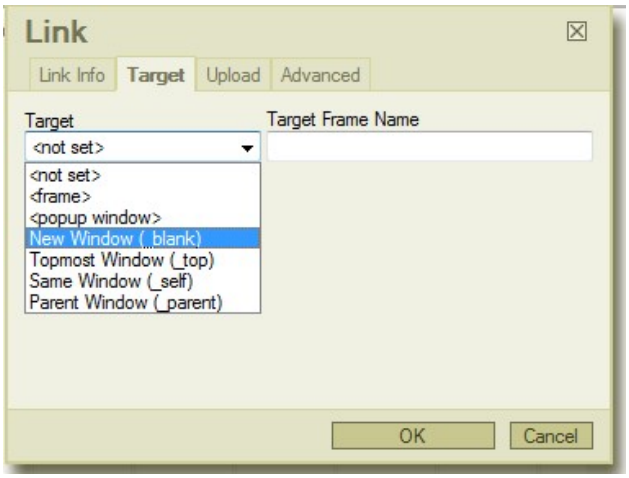
When you click that icon, you will be presented with a dialogue that allows you to insert the link to your event. The link you need is available on the Dashboard of each event:

The link dialogue looks like this:

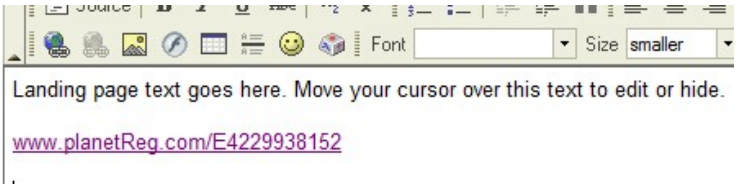


You will note that the pasted link does not include the http:// part.

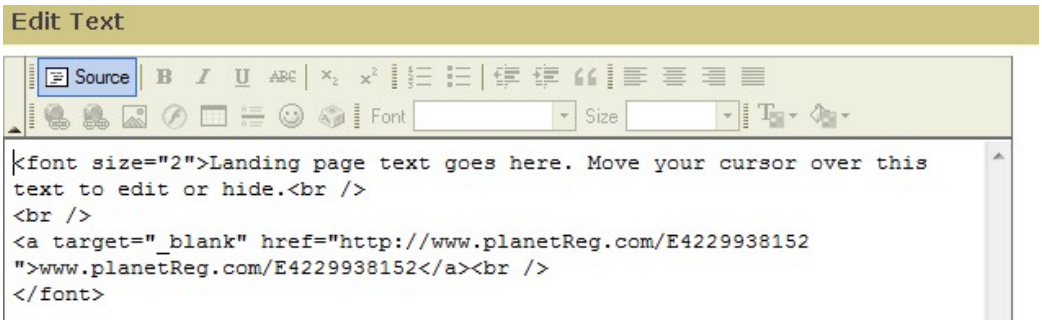
After entering the event link, click on the Target tab and ask to open the link in a New Window:



When you click OK, you will see the link shown in blue and underlined:

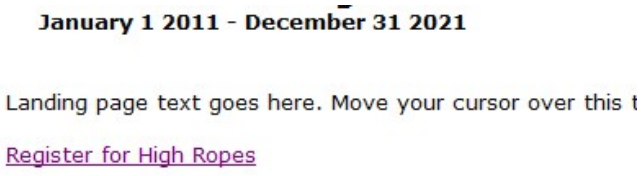


You may wish to change the raw link into something easier to read an understand. You can do that by clicking on the Source link for the text box. When you click the Source tab, you will expose the html code of the text:



You can change the text displayed by the link by changing the data between the brackets >...< to look like this:

Now your text will look like this (click the Source link to return to normal mode):



See also

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Home > Other Management tasks > Dynamic event display on landing page

Dynamic event display on landing page

If you have a series of events that occur over time, with events starting and ending regularly, you can set up a landing page that will automatically display and remove events as they expire in time, i.e. Open events are

displayed, Closed events are not.

Some examples might be:

Training courses or seminars held on a regular basis.
Meetings held periodically.

You can also use this feature to simply reduce your landing page set up effort by taking advantage of the automatic display.

The general method used to insert events on a dynamic landing page uses a special tag inserted in the text area of the landing page:

[prefix_suffix]

The brackets are used to indicate to the system that this is a special tag.

There must be an underscore character _ between the prefix and suffix.

There can be no spaces anywhere in the construct.

There are two prefixes:

Events
Landings

The prefix must be spelled and capitalized as shown. Prefixes and Suffixes are case sensitive.

There is one fixed suffix:

Open

And, you may also define your own suffix in order to group events. You do this by entering a Group code on the Extras tab for an event:

The simplest usage of the dynamic event display would be to display all of your Open events. To accomplish this, you would enter this text on your landing page:

[Events_Open]

Note that the brackets, underscore and exact wording must be used for this to be successful. When the system detects that tag in your text, it is replaced by all of your Open events:

Events listed via Event_Open tag:

B1 Test Event
Click Here to register.

Donation test event
Click Here to register.

B2 Test Event
Click Here to register.

Free reg tester
Click Here to register.

Events listed via group tag Event_B1B2:

B1 Test Event
Click Here to register.

B2 Test Event
Click Here to register.

If more than one event is present, they will be listed in event date order, with oldest first, newest last.

Suppose you are running seminars with limited capacity and you see that a particular date is filling up. You could add a new event - say running the following day. That new event would be slotted into your event list in date order.

If you wished to group your events on the landing page, you could assign a group code - using the same code for events you wish to keep together.

Suppose you have weekly classes, and would like to group them according to month. You could enter a Group code like:

JAN
FEB
MAR
APR
...

Then enter the following text on your landing page:

The theme for January classes will be how to best use Pinterest

[Events_JAN]

The theme for February classes will be how to best use Facebook for marketing your ideas

[Events_FEB]

Etc.

In all cases, only **Open** events will be displayed. Any event that is **NOT** Open will be skipped.

Open events that may be unavailable due to inventory or having gone past their close date will still be displayed, so it important to close any event you do not want to display.

Another example - you have a series of firearms training courses - broken into:

Getting your permit
Pistol range and practice

Rifle range and practice

You could use Group codes:

Permit
Pistol
Rifle

And thus on your landing page:

We are pleased to offer periodic training courses that will lead to your concealed carry permit:

[Events_Permit]

Once you are licensed, please consider our range nights - specifically for pistol training:

[Events_Pistol]

etc.

The Landings prefix can be used to present a consolidated Landing page that includes all of your Open Landing pages. The only suffix available for this prefix is Open.

:

See also

Basic vs Pro Mode
Multiple Events: Lookup Attendee and ME Reports
Attendee maintenance
Name Badges
My account settings
Create landing page
Make a Payment
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Make a Payment

There will be a link on your PlanetReg invoice which can be used if you wish to make your services payment using Paypal.

You can also click the make a payment link on your my account page:

Make a Payment

Our records indicate you have a balance due of $18.00.

Click here to pay this balance now via Paypal.

To pay this balance via check:
Make check payable to **Hemko Systems Corp.**
To ensure proper credit, please include an **Invoice Number** on the check.
Invoice Numbers are displayed as 'ID' in your Financial Review report.
Mail check to
Hemko Systems
5560 Stone Church Court
Loveland, CO 80537

For details concerning paying your PlanetReg fees, click here.

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See also

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Upload files

Under the my account link you will see a link to upload files. The purpose of this link is to allow you to upload additional graphics, release forms, handbooks, medical forms, etc.

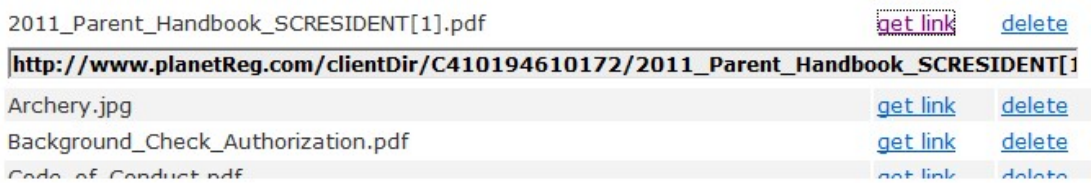
Once a file/ form has been uploaded, it can be referenced by the system. Note - if you have your own web accessible source of files, that can be used in lieu of the file upload.

Here is an example of uploaded files:

Upload File

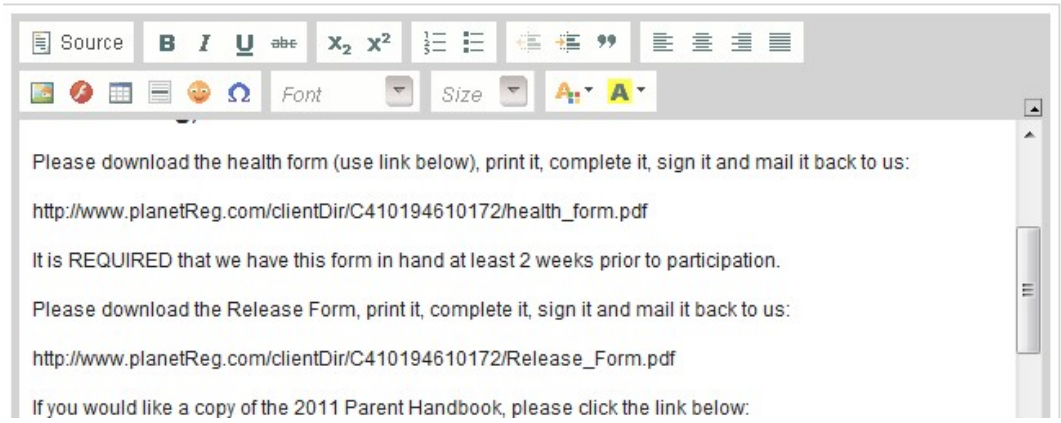
2011_Parent_Handbook_SCRESIDENT[1].pdf	get link	delete
Archery.jpg	get link	delete
Background_Check_Authorization.pdf	get link	delete
Code_of_Conduct.pdf	get link	delete
CPR.jpg	get link	delete
DayCampParentHandbook2011[1].pdf	get link	delete
health_form.pdf	get link	delete
High_Ropes.jpg	get link	delete
Lifeguard.jpg	get link	delete
Reference_Form.pdf	get link	delete
Release_Form.pdf	get link	delete
RELEASE_OF_LIABILITY.pdf	get link	delete
socialnetworking_policy.pdf	get link	delete

You will note that each file has a get link. When you click that link you will be given a web address for that file:



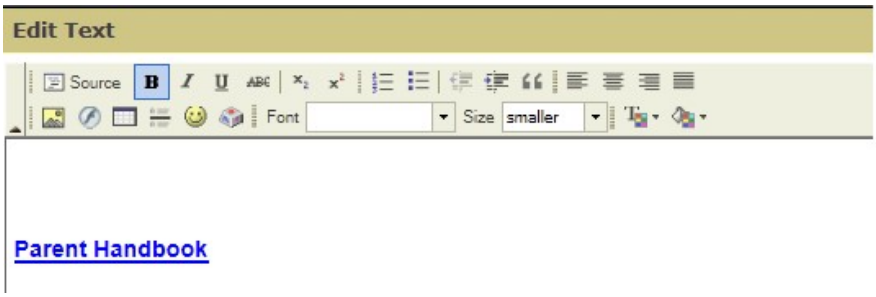
This link can be copied - highlight the link, right click the highlighted link and choose copy. It can then be included as a downloadable item on a confirmation or can be included in any of the descriptive areas of your forms. Here is an example of pasting the link into your email confirmation:

Customize the confirmation email

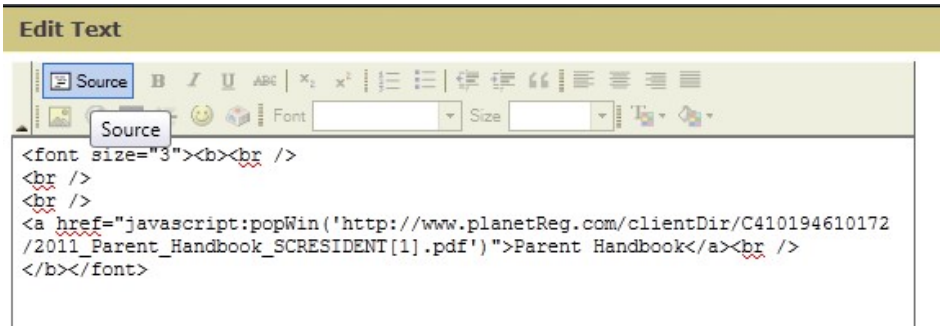


You can also imbed the file - normally a pdf format file - in text areas by clicking on the Source option in the edit panel.

An example using the Registration details section:



To insert the link and have it available as a 'pop up' in a separate browser window:



The code you need to insert:

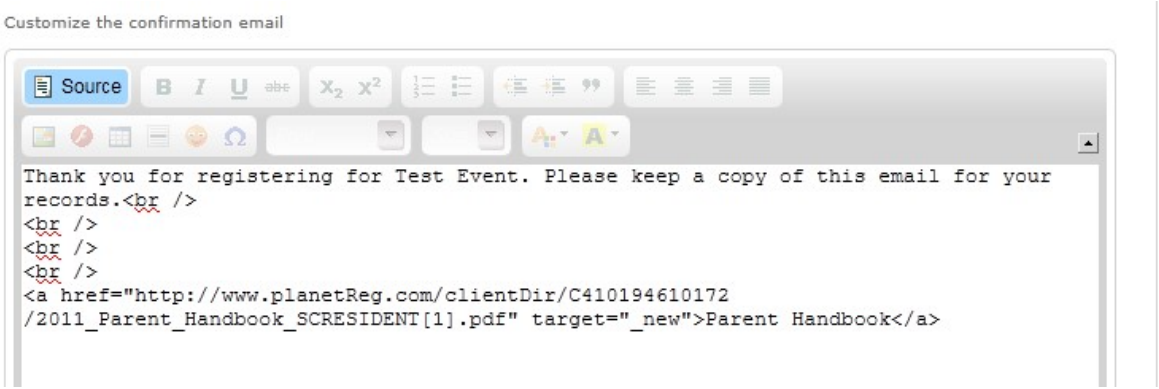
Description of link here

Note - this 'pop up' only works when your text is under the control of a browser - i.e. Internet Explorer, Firefox, etc.

It does not work in an email.

This will cause a pop up of the parent handbook in a new browser window and it will look like this:

To accomplish a similar pop up window in your confirmation email, you also need to expose the source and insert a bit of html coding:



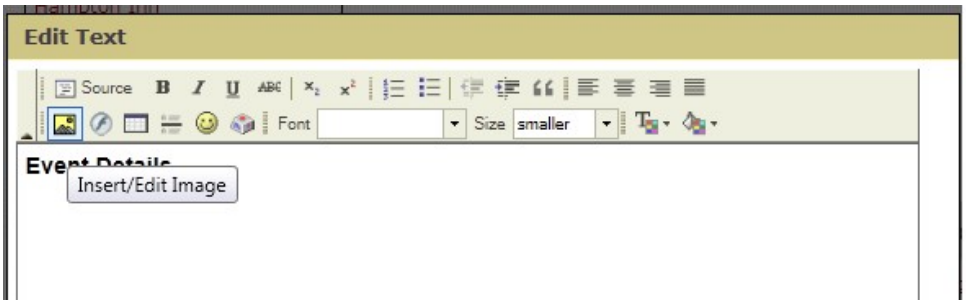
In this case you are inserting:

--description of download--

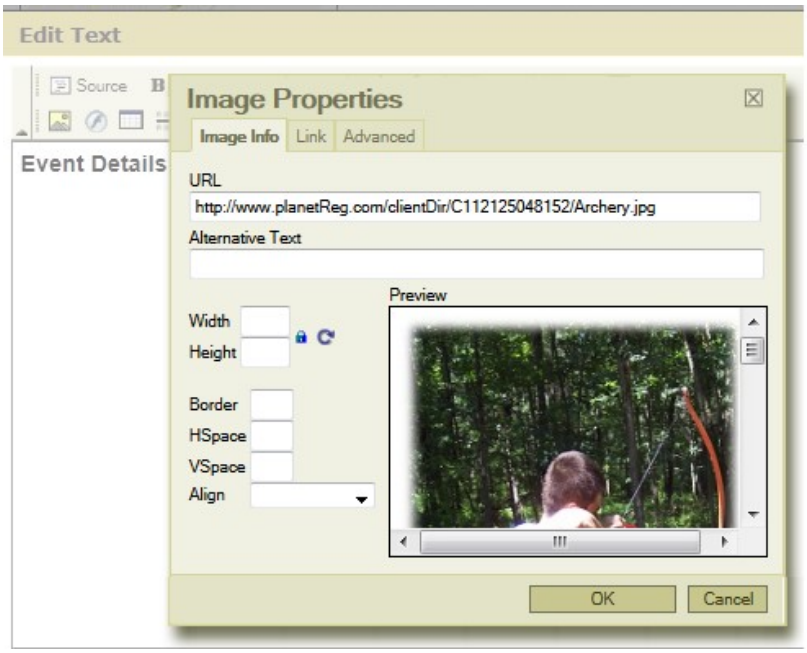
You can also include additional graphics in your text areas:

We have downloaded a graphic of an archer and want to include it in our event details section:

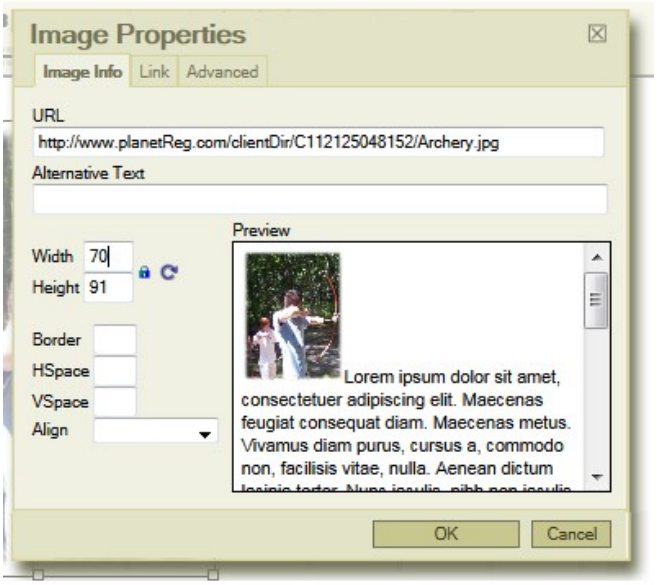
We start by choosing the insert image icon:



The dialogue box asks for a link - and we have copied the link from our 'get link' action:



You may also change the size of the image by altering the width or height - enter the number of pixels:



The final result:

.

See also

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Home > Other Management tasks > Financial review

Financial review

The financial review link on the Account Home page will display a list of financial transactions for your PlanetReg account:

ID	Date	Type	Event	Amount
845	5/2/2011 10:15:11 AM	Invoice	MSTA Star 2011	$18.00
812	4/7/2011 2:48:52 PM	Check Payment	N/A	$37.00
748	4/1/2011 6:42:29 PM	Invoice	MSTA Star 2011	$37.00
719	3/7/2011 3:09:55 PM	Check Payment	N/A	$44.00
656	3/1/2011 3:37:25 PM	Invoice	MSTA Star 2011	$44.00
624	2/4/2011 3:09:59 PM	Check Payment	N/A	$61.00
566	2/1/2011 10:43:15 AM	Invoice	MSTA Star 2011	$61.00
558	1/22/2011 1:26:43 PM	Check Payment	N/A	$103.00
513	1/1/2011 7:05:50 PM	Invoice	MSTA Star 2011	$103.00

Balance Due: $18.00

(click on ID to view transaction details)

See also

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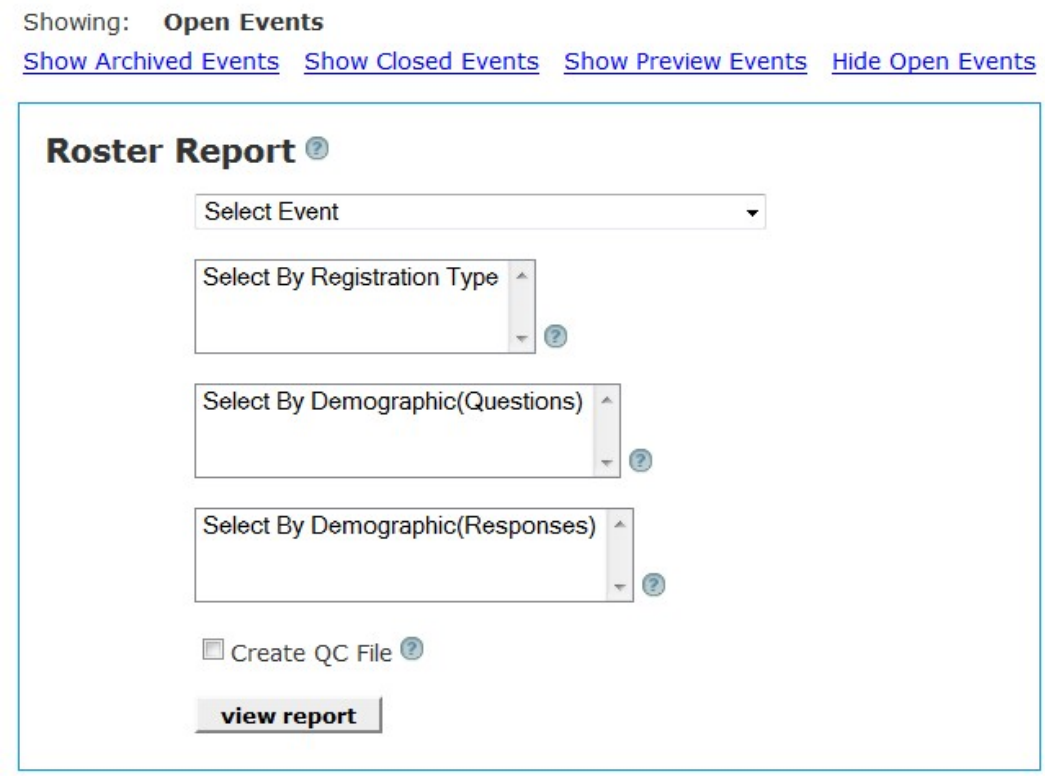
Advanced reports

The advanced link on the Account Home page, opens a page that is similar to the report builder on the event/ project home screen. The difference here is that you have access to all of your events/ projects, however, the reports focus on a single event/ project only:



See also

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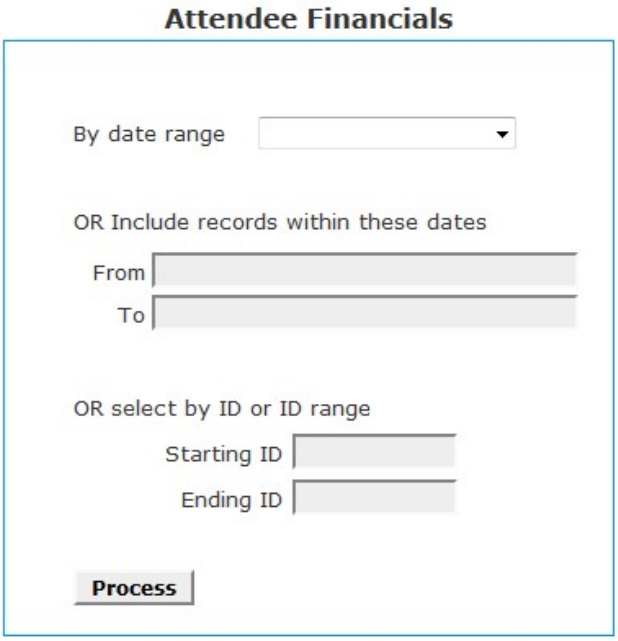
Attendee Financials

This report is found under the 'My account' page.

This report provides extensive financial details on your registrations.

The opening panel requests selection criteria if you wish to limit the report:



If you just click Process without any selection, you will get all registrants.

The report shows you each registrant with financial details shown:

16	Hall,	MSTA Star 2012	173612	Cancelled	48250		11/16/2011	Invoice	$75.00
					48253	48251	11/16/2011	Paypal Payment	$(75.00)
					88096		6/5/2012	Reverse Invoice	$(75.00)
					88097		6/5/2012	Non-refundable Items	$6.00
								Balance	$(69.00)
17	Boeck,	MSTA Star 2012	174196	Active	48363		11/17/2011	Invoice	$104.00
					61146		1/26/2012	Check Payment	$(104.00)
								Balance	$.00
18	Macy,	MSTA Star 2012	175038	Active	48539		11/19/2011	Invoice	$229.00
					48540		11/19/2011	Miscellaneous Credit	$(1.00)
					48541		11/19/2011	Check Payment	$(228.00)
					89848		6/11/2012	Miscellaneous Credit	$(60.00)
								Balance	$(60.00)
19	Larsen,	MSTA Star 2012	185943	Cancelled	49932		12/11/2011	Invoice	$106.00
					49935	49933	12/11/2011	Paypal Payment	$(106.00)
					82734		5/15/2012	Reverse Invoice	$(106.00)
					82735		5/15/2012	Non-refundable Items	$1.00
								Balance	$(105.00)

There will be a total at the end of the report:

202	cobarr,	MSTA Star 2012	302612	Active	94515	6/29/2012	Invoice	$60.00
					94516	6/29/2012	Credit Card Payment	$(60.00)
							Balance	$.00
203	wall,	MSTA Star 2012	302623	Active	94517	6/29/2012	Invoice	$45.00
					94518	6/29/2012	Cash Payment	$(45.00)
							Balance	$.00
204	bonner,	MSTA Star 2012	302643	Active	94519	6/29/2012	Invoice	$45.00
					94520	6/29/2012	Credit Card Payment	$(45.00)
							Balance	$.00

Total Charges	$19,246.00
Total Credits	$(22,499.50)
Balance	$(3,253.50)
Refund Transactions Total	$15.00

Any of the underlined numbers are links to either transactions (on the right) or registrations (on the left).

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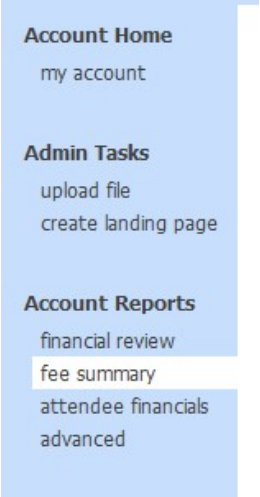
Home > Other Management tasks > Fee Summary

Fee Summary

The Fee summary report - accessed via the my account link at the top of the dashboard - provides a way for you to see how/ when fees have been charged for your registrations.



Count	Reg Date	Name	ID Number	Status	Registrant Fee	Client Fee	Registrant Invoices	
1	4/10/2013	Hatzis, Ji	736881	Active	$.00	$2.95	294300	$130.00
2	5/10/2013	trimmer, adam	737976	Active	$.00	$2.95	295096	$200.00
3	8/10/2013	ruediger, michele	740252	Active	$.00	$2.95	296777	$50.00
4	8/10/2013	McRobbie, Jarrad	740332	Active	$.00	$2.95	296858	$200.00
5	8/10/2013	Goodall, Norm	741161	Active	$.00	$2.95	297185	$200.00
6	9/10/2013	Moore, Vic	742703	Active	$.00	$2.95	297976	$200.00
7	10/10/2013	Myllynen, Michael	743852	Active	$.00	$2.95	298497	$60.00

You will see columns for client fee and registrant fee. If an amount is in client fee, it means that you are not passing on the service fee to your registrants. Amounts in registrant fee means you are passing on the service fee to your registrants.

If you have more than one event, all events are summarized at the bottom of the report.

LIFEFit Challenge & 5K - Participant Registration	40	$.00	$45.10	$1,255.00
Rise Up and Take Your Place - Summer Bash	0	$.00	$.00	$.00
LIFEFIT Challenge & 5-K - SPONSORS	0	$.00	$.00	$.00
LIFE Groups - Fall 2012 Group Leader Registration	0	$.00	$.00	$.00

Note: Only fees already invoiced are included in this report.

Only fees that have been invoiced to you are included in the report, so if your event is still taking registrations, the totals are only accurate to the point you were last invoiced by us.

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Status Codes

There are four different status codes used by to identify the status of every attendee. You will see these status codes on your Roster report and on confirmation views:

Active - the registrant has successfully registered and has indicated and completed some form of payment indication.

Hold - the registrant has successfully registered, but has not completed the Paypal payment section. This is often seen when a registrant has abandoned the Paypal screen and may or may not have returned to the registration. In all cases, sends a preliminary confirmation to the registrant stating:

This is an automatically generated message. DO NOT REPLY TO THIS EMAIL.

Attention: This registration will be in Hold status until payment is received.

Normally, no details of the registration are shown.

Any registrant who chooses the Paypal payment option will receive this preliminary email. This is because the Paypal payment screen can be abandoned with the registrant leaving their payment status unknown.

If the registrant returns to your event and looks up their registration, they will see:

Financials

Transaction ID	Description	Date	Amount
6860	Invoice	1/20/2010 1:08:01 PM	$56.10
6862	Paypal Payment Initiated	1/20/2010 1:08:01 PM	($56.10)
Balance Due			$56.10

Make a payment

The financial section indicates that a Paypal payment was initiated. There is also a Make a payment link that will lead the attendee to a screen where they can continue on to Paypal again, or choose another payment type (if available).

Cancel - indicates that you as the event administrator has canceled this registrant. Note that canceled registrants still appear on the Roster report.

Test/Preview - indicates that this registration was made in Test/ Preview mode. These registrants also appear in the Roster report, but can easily be deleted by selecting the Delete test registrations link on the Event home page.

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Waitlist considerations

Should your event have limited capacities in either your complete event, or sessions within your event, you may wish to provide for a method of collecting waitlists.

In the case of the complete event having a capacity - i.e. only so many seats available, you should use a separate registration type to gather waitlists:

Please note that we are limited to 50 seats for this presentation. If the registration below shows as:
Not Available
You may still register for a waitlist - choose waitlist registration type below. Should seats become available, we will notify you and you can register as an attendee.

Registration	Price	Action
Registration	50.00	edit | copy | delete
Please add me to waitlist	0.00	edit | copy | delete

add new | save order | inventory

If and when a seat becomes available, you can notify the waitlisted registrant and have them re register, or you can add them yourself, using the data from their confirmation. As an administrator, all inventory is over ridden when you add an attendee from the dashboard **add attendee** function.

If you have the same issue with sessions, the best approach is to offer the same set of sessions, but described as a waitlist:

Please indicate your session choices below. If your first choice is full, please make another choice and also indicate your first choice in the waitlist section. If at all possible, we will move you to your first choice and notify you by email.

Session 1 - 10:00am - 11:30am*
- Advertising on Google
- Promotion and advertising on Facebook
- Advertising on Yahoo (Not Available)
- Creating your email campaign
- Managing your SEO optimization

Session 1 Waitlist - 10:00am - 11:30am
- Advertising on Google
- Promotion and advertising on Facebook
- Advertising on Yahoo
- Creating your email campaign
- Managing your SEO optimization

Session 2 - 1:30pm - 3:30pm*
- Examining comprehensive marketing
- How to implement a cogent plan of attack
- Making the most of word of mouth
- Using blogging to your benefit (Not Available)

Session 2 Waitlist - 1:30pm - 3:30pm
- Examining comprehensive marketing
- How to implement a cogent plan of attack
- Making the most of word of mouth

In the above case, the session labelled Advertising on Yahoo is full, so the registrant is required to choose an alternate selection, but can then indicate that they wish to be waitlisted for that session on the 'Waitlist' session

list.

If a session becomes available, you, as an administrator, can retrieve the record and make the change. Administrative changes bypass all inventory checking.

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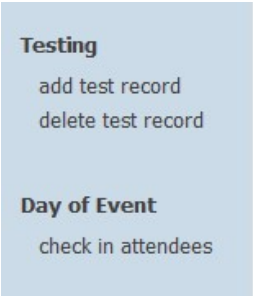
Record attendance

If you would like to make a record of actual attendance at your event, you can use the ***check in attendees*** link on the Dashboard page:



When you select this link, you will be presented with a search box that can be used to present an alphabetic list of registrants based on starting characters you enter into the box:

Attendee Check In

Search s find

show all attendees

Status	Action	Name	Email	Registration Type
unmarked	check in	**Pat Sackette**	Pat Sackette	Regular member
unmarked	check in	**Luis Santiago**	lsantiago@fuse.net	Regular member
unmarked	check in	**Marty Sanzottera**	poppaquicktime@yahoo.com	Regular member
unmarked	check in	**karl schulstad**	bikermd59@yahoo.com	Regular member
unmarked	check in	**al schulz**	bigalfschulz@yahoo.com	Regular member
unmarked	check in	**Steve Seitz**	AnovaX1@gmail.com	Regular member
unmarked	check in	**Jon Selby**	meangreen9c1@yahoo.com	Regular member
unmarked	check in	**rod sentell**	rod sentell	Regular member
unmarked	check in	**Marcela Shackelford**	Marcela Shackelford	Regular member

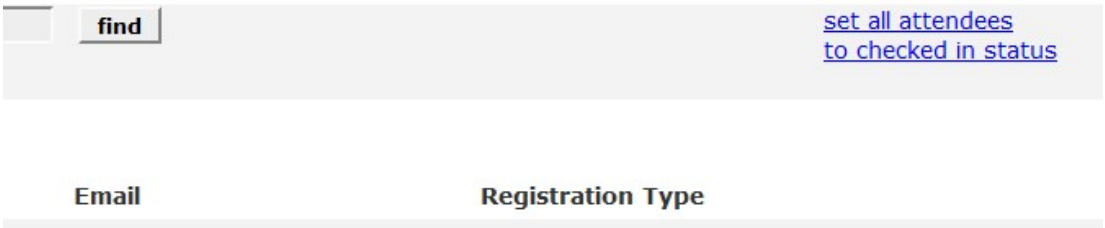
By clicking the check in link, you are affirming that the registrant(s) attended the event:

show all attendees

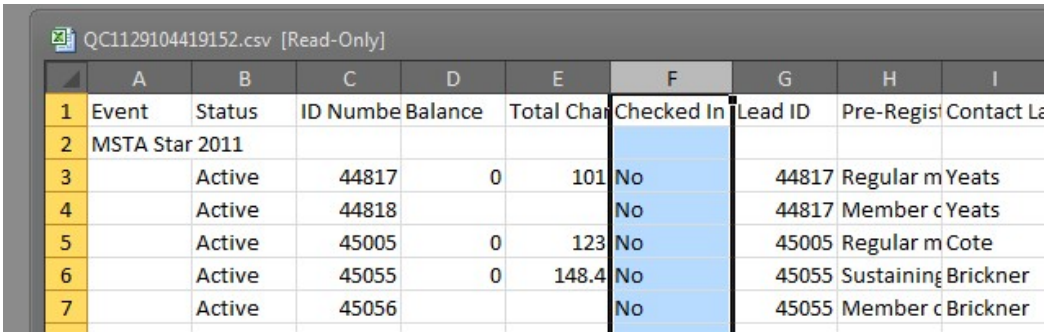
Status	Action	Name	Email
unmarked	check in	**Pat Sackette**	Pat Sackette
checked in ✓	check out	**Luis Santiago**	lsantiago@fuse.net
checked in ✓	check out	**Marty Sanzottera**	poppaquicktime@yahoo.com
checked in ✓	check out	**karl schulstad**	bikermd59@yahoo.com
checked in ✓	check out	**al schulz**	bigalfschulz@yahoo.com
unmarked	check in	**Steve Seitz**	AnovaX1@gmail.com
unmarked	check in	**Jon Selby**	meangreen9c1@yahoo.com

If you make a mistake, just click the check out link.

If it is more convenient to just mark those who did not attend, there is a link on the right side of the screen that allows you to mass check in the whole event, assuming that you will then go through the list to check out those who did not attend:



The csv file will have a column indicating the checked in / attended status:



QC1129104419152.csv [Read-Only]

	A	B	C	D	E	F	G	H	I
1	Event	Status	ID Numbe	Balance	Total Char	Checked In	Lead ID	Pre-Regist	Contact La
2	MSTA Star 2011								
3		Active	44817	0	101	No	44817	Regular m	Yeats
4		Active	44818			No	44817	Member c	Yeats
5		Active	45005	0	123	No	45005	Regular m	Cote
6		Active	45055	0	148.4	No	45055	Sustaining	Brickner
7		Active	45056			No	45055	Member c	Brickner

Checked in status can also be selected in the report builder - see Report builder.

See also

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Home > Other Management tasks > Pre Populate Forms (API)

Pre Populate Forms (API)

If you maintain a data base of registrants on your own system, you can use that data base to pre-populate a registration form.

Obviously, you need some programming expertise to do this.

Click the link below to bring up the API procedure:

Pre populate registration forms

See also

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Inventory control

If you have defined maximums for registration types or additional items or sessions, when an attendee registers, or you make a test registration, the remaining inventory is adjusted (reduced).

That means if you are selling seats at a seminar, as soon as someone completes a registration, the number of available seats is reduced by one.

Note well that test/ preview and hold status registrations effect inventory.

If you have test registrations that have not been deleted, they will reduce your available seats or other items that appear in the test registrations.

The best practice is to delete test registrations before you open your event.

If you cancel a registration, any inventory being held by that registration becomes available for sale again.

How the inventory works when you are taking registrations:

1. As soon as a registrant opens the registration - i.e. clicks on the link, an inventory snapshot is taken. If items are sold out they will show as greyed out (sessions) or 'not available' - registration types and additional items.

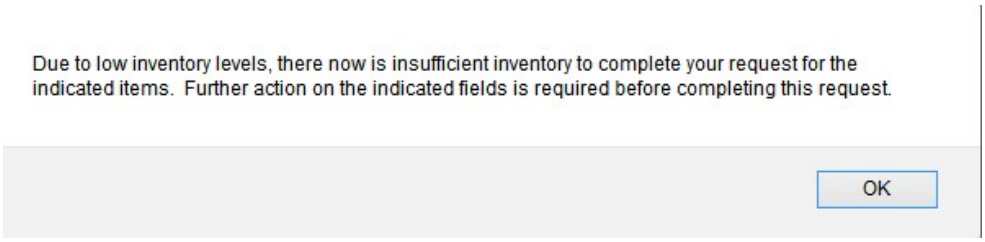
2. The registrant is allowed to register for anything that was not 'sold out' when they started the registration process. The system does not return to the server to assess immediate inventory when any item is picked.

3. When the registrant clicks the 'Register' button, the system returns to the server to:
 a) assure that anything chosen is STILL available, and if it is,
 b) to reduce the inventory of selected items.

4. If an item is found to have sold out between starting the registration and pressing the register button, the registrant is returned to the section of the registration with the sold out condition and instructed to choose something else.

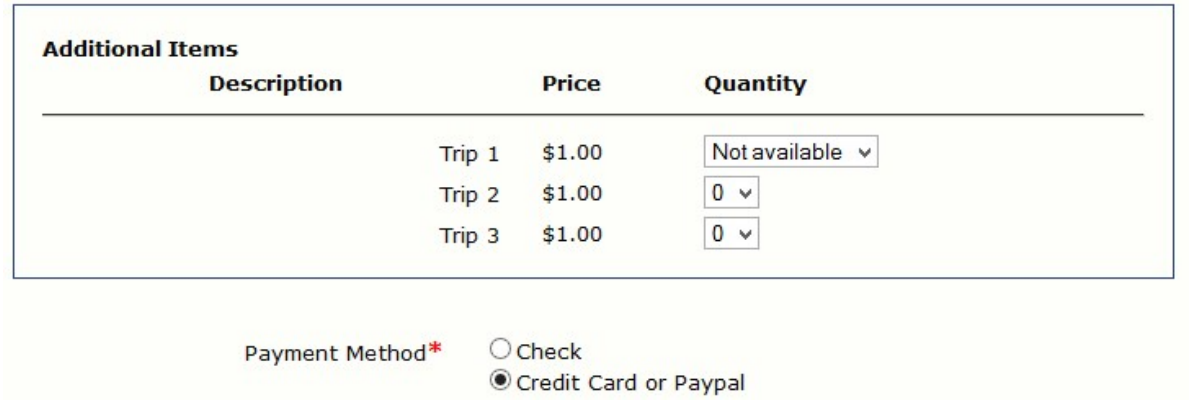
If two people start registering at the same time - and assume one of something is still left - they will both be presented with an 'available' item. Only one of them will be successful - the first one to reach the 'register' button. The other registrant will be returned to make another selection.

This is the message a registrant will receive when inventory has been 'lost' during a booking - i.e. someone else got it first:



When the registrant presses the OK button, they are returned to the questions screen with an indication that a panel must be edited (edit required):

In this case, an Additional Item (Trip 1) was exhausted between starting the booking process and pressing the 'Register' button.



Note that Trip 1 now shows as 'Not available', so the registrant must choose Trip 2 or Trip 3.

If the inventory at issue is a session, it will act the same way - when returning to edit, the sold out session will be greyed out:

If less than 10 are available, the remaining count will be shown.

See also

Basic vs Pro Mode
Multiple Events: Lookup Attendee and ME Reports
Attendee maintenance
Name Badges
My account settings
Create landing page
Dynamic event display on landing page
Make a Payment
Upload files

Paypal issues

If you are a long time and frequent Paypal user with a lot of transaction history, you probably don't need to read this section because you have already faced most of these issues.

- Paypal will accept credit cards for your event as long as you have either a Premium or Business account. Paypal suggests you have a Business account if you want to accept credit cards. Business accounts do not cost extra.
- Paypal may temporarily suspend your account after reaching a certain level of credit card usage. Since they must cover the charges should there be a dispute, they will probably call you and have you verify that you are legitimate. They may ask for proof that you are who you say you are and are providing a legitimate service. Paypal is attacked constantly by fraudsters, so they tend to watch their back carefully. If you are legit and provide the documentation they ask for, you should not have a problem. Be patient and don't get mad - look at it from their point of view
- Should Paypal suspend your account while verifying your business/ identity, they may continue to accept credit cards, but not immediately provide you with the funds.
- People may become confused when presented with the Paypal payment screen. If they abandon their Paypal payment, they are still registered, just not paid. These attendees are shown with a Hold status.
- The registration system sends 2 emails to people who pay via Paypal. The first email is a notification that we have their registration and are waiting for payment verification from Paypal. See below for sample of the first email received after exiting to Paypal.
- If Paypal verifies their payment, they get a second email which is a full confirmation of their registration. The first email has all the information they need to access their registration and initiate a payment. If you have an alternative payment option, they may choose that when they return. If they originally chose Paypal and you also take checks, they can choose to pay by check when the retrieve their registration. See the Attendee maintenance section for information on how to apply checks.
- It is a good idea, but not necessary, that you offer an alternative way to pay - especially if your event involves large costs.
- If you are a non profit be sure to look at: Have a non profit - get a break from Paypal
- If you do a lot of credit card business, be sure to look at: Paypal PRO. At $30.00 per month it provides you with an easy to use internet gateway that does not mention Paypal - it just asks for credit card information.

The video below shows a typical Paypal session. It shows the user paying for their event with a credit card (1:52).

Below is an example of what the first email looks like. It is sent as soon as the registrant exits our system to Paypal. Since we lose control of the session while Paypal processes, this email provides an explanation and way for the registrant to return. If the registrant abandons Paypal or fails to complete a payment for any reason, this may be their only link back to their registration.

Should you need to direct a registrant back to their registration, there is a link at the bottom of the email:

If you abandoned/quit the Paypal process, you can access your record by clicking here and entering your last name and ID Number 318749. There you may pick another form of payment (if available), or redo the Paypal procedure by clicking the "Make a payment" button.

And at the bottom of the page:

Please save this email and note your ID number.
Should you wish to review your arrangements, click here to login.

They will be required to use the 'Find me' box (assuming it is present and not hidden), enter their ID number and either email address or last name.

Their registration will be shown and they will have a 'Make a Payment' button which can be used to return to Paypal and make their payment.

Note also that there are instructions regarding a successful payment that does not result in returning to PlanetReg. This happens. Not very often, but it does happen occasionally. If the registrant successfully completes a Paypal payment, but does not receive a PlanetReg confirmation, there are instructions on this email:

If you are sure that your payment was submitted and processed correctly, please send a copy of your Paypal transaction details to Info@myurl.com.

Of course, you as the administrator should also see an email from Paypal (at your Paypal email address).

If you are sure that the registrant paid, you must retrieve his/her registration and change the status to Active and ask to Send a confirmation so the registrant knows his/her record is complete.

You can use either the attendee look up: Lookup attendee or the quick roster Quick roster to retrieve the attendee and ask to Change Status Attendee maintenance.

You should also enter the Paypal payment while you have the attendee record displayed Attendee maintenance.

Don't forget to ask the system to Send a confirmation.

Other possibilities to investigate when Paypal is not completing:

- Your Paypal account is not a Premier or Business account. Log into your Paypal account and check it.
- You did not specify that you were collecting money on the General tab See Edit General section
- Your Paypal account is a business account but you have immediate notification turned off Paypal Instant Payment Notification
- You have turned on a preference in your profile **Selling Preferences** / **Website Payment Preferences** called **Encrypted Website Payments**. Make sure this setting is Off, otherwise your registrants will see this error when they attempt to pay:

The seller accepts encrypted website payments only. You cannot pay the seller through un-encrypted buttons. Please contact your seller for more details.

In some cases - especially when you are stumped - it may be easiest to contact a registrant and ask them what kind of problem they experienced. If they say their was no way to pay with a credit card, you know your account is not the correct type. If that is the case, best to close down your registrations (Close the event) and fix the problem, then re Open the event.

Once you have figured things out, you will want to check this help section: When my Paypal fails

Sample email sent to registrant before they exit to Paypal:

This confirms receipt of your a-team august builder's school for XOOMA Worldwide August Builder's School.

This email is generated automatically when you exit to Paypal.

If you do not receive an additional confirmed email showing your payment, your Paypal payment has not been acknowledged by Paypal.

If you are sure that your payment was submitted and processed correctly, please send a copy of your Paypal transaction details to jerome@pro-xooma.com.

If you abandoned/quit the Paypal process, you can access your record by clicking here and entering your last name and ID Number 318749. There you may pick another form of payment (if available), or redo the Paypal procedure by clicking the "Make a payment" button.

If you would like a demonstration of how to make a Paypal payment with a credit card - whether or not you have a Paypal account, click this link: Paypal Credit Card Sample

Until your payment status is resolved, your record will be in a Hold status. Thanks again for registering.

ID Number: 318749

A full confirmation of your arrangements will also be sent to this email address.If you do not receive the full confirmation within 48 hours, please login to review your arrangements or contact Jerome Gafford via email.

Questions concerning the status of this record?
Contact Jerome Gafford via email at jerome@pro-xooma.com

For assistance please contact Jerome Gafford via:
Email: jerome@pro-xooma.com

Please save this email and note your ID number.
Should you wish to review your arrangements, click here to login.
Registration services provided by PlanetReg.

Note the click here at the bottom of the email. If a registrant calls, you can have them click that link and the system will return to their registration, where they will see a 'Make a Payment' button. When they click that button they can try their payment again.

See also

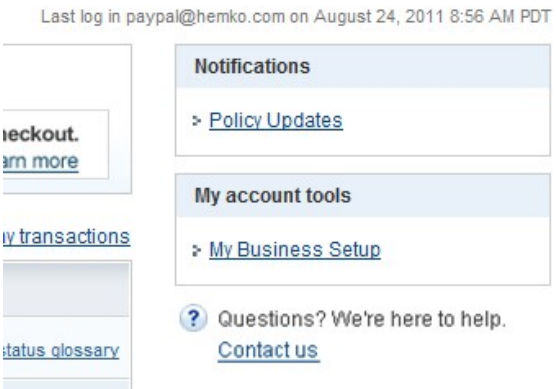
Basic vs Pro Mode
Multiple Events: Lookup Attendee and ME Reports
Attendee maintenance
Name Badges

Paypal Instant Payment Notification

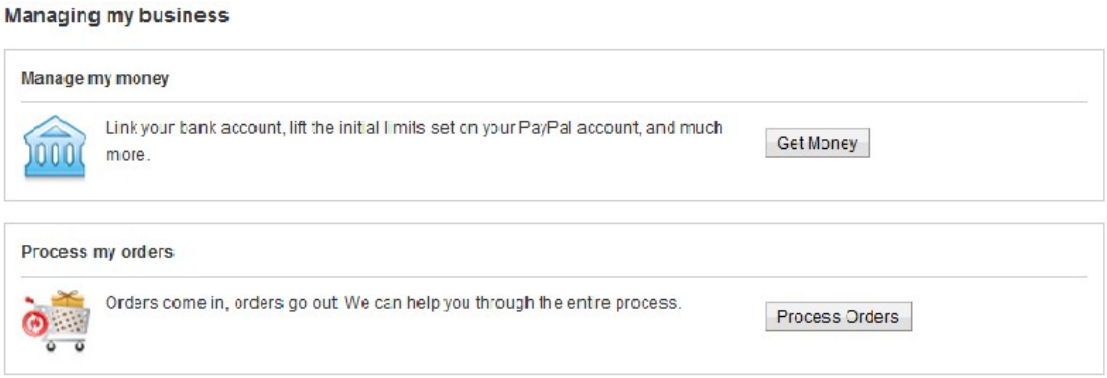
Your Paypal account must be configured to provide Instant Payment Notification in order to work correctly.

If this setting is turned off for your account, the registration system will not know when someone pays a registration fee to you.

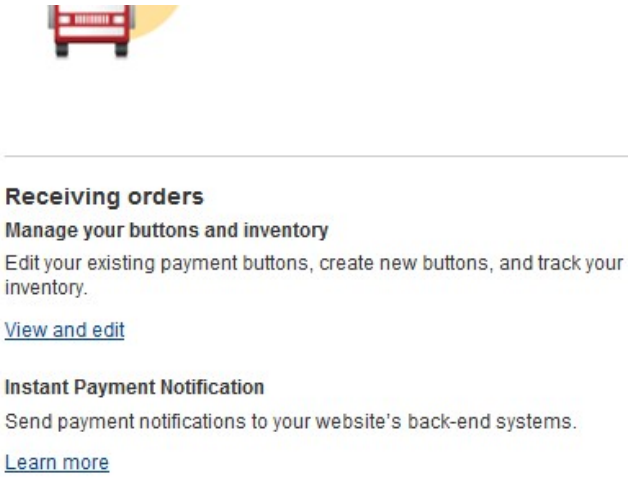
To make sure this setting is turned on, access your Paypal account and click the My Business Setup link:



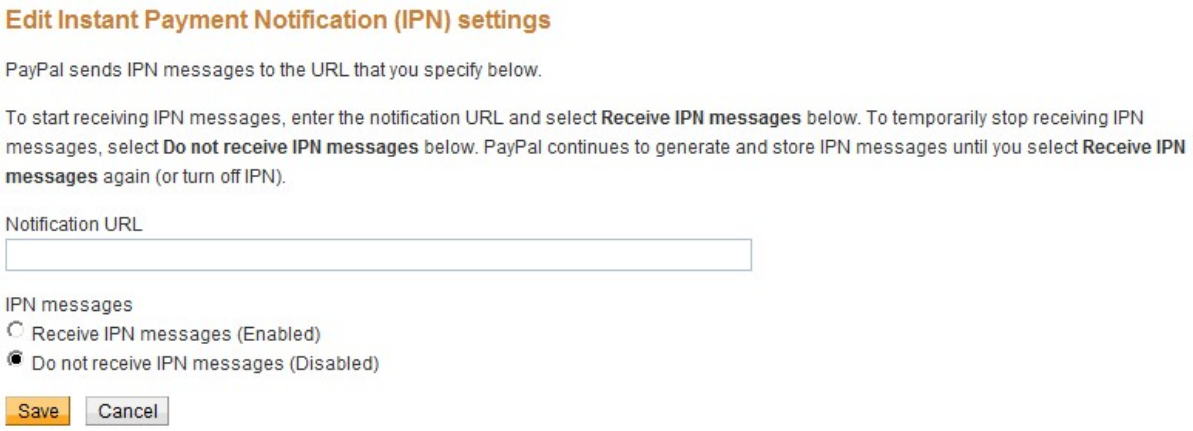
Scroll down to the Process my orders section and click the Process Orders button:



You will now see a link for Instant Payment Notification, click the Learn more link:

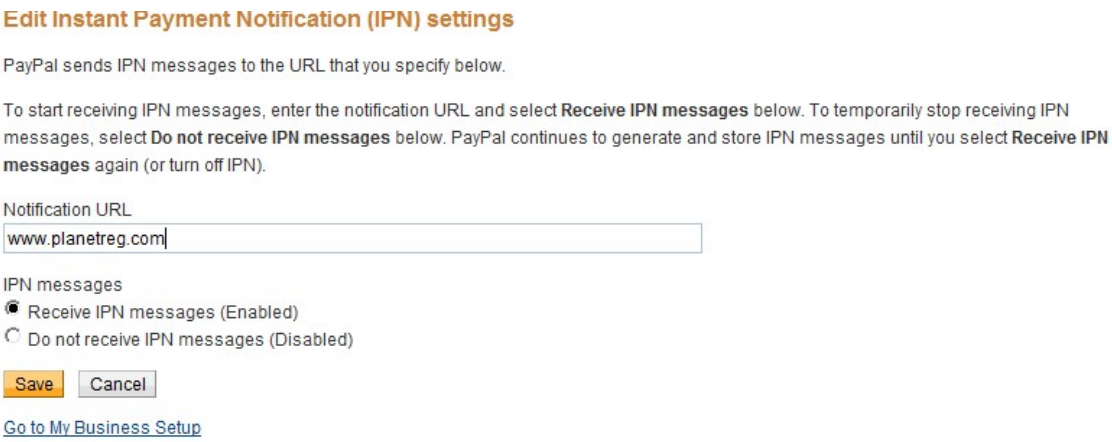


When you click the Learn more link, you will be shown the Current settings:



Click the radio button to Receive IPN messages (Enabled). You must enter a URL in the Notification URL text area. If you have your own web site, enter the URL for your site. If you have no website, enter the planetreg URL here (shown in the example).

Instant Payment Notification enables our software to receive notices of payment when anyone registers and pays you using Paypal. Without the setting enabled, we have no way to know who/if anyone has paid you.



Save the setting and you are done.

See also

When my Paypal fails
Have a non profit - get a break from Paypal
Paypal PRO

Home > Other Management tasks > Paypal issues > When my Paypal fails

When my Paypal fails

You have diagnosed your Paypal problems See Paypal issues and now need to notify your Hold status registrants that they should return to their registrations and make a payment.

Depending on the number of Holds you have, it may be easiest to just contact registrants individually via phone or email and have them use their registration link to return to Paypal via the Make a payment button.

If you have more than a few Holds, you can send a bulk email to just the Hold status registrants:

Note the codes are case sensitive.

Registrant Fields	Event Fields	Coordinator Fields
first name: [firstName]	name: [eventName]	name: [coordinatorName]
last name: [lastName]	date: [date]	phone: [coordinatorPhone]
nick name: [nickName]	time: [time] or [time24]	email: [coordinatorEmail]
email: [email]	venue: [venue]	company name: [companyName]
reg ID: [regID]	header image: [headerIMG]	company URL: [companyWebURL]
reg description: [regType]	event link: [eventURL]	company address: [companyAddress]
member ID: [memberID]	survey link: [surveyURL]	company Email: [companyEmail]
customer ID: [customerID]	event ID: [eventCode]	company fax: [companyFax]
sessions: [sessions]		business number: [companyBusinessNumber]
auto login link: [loginURL]		
auto login using 'Click Here': [loginClickHere]		

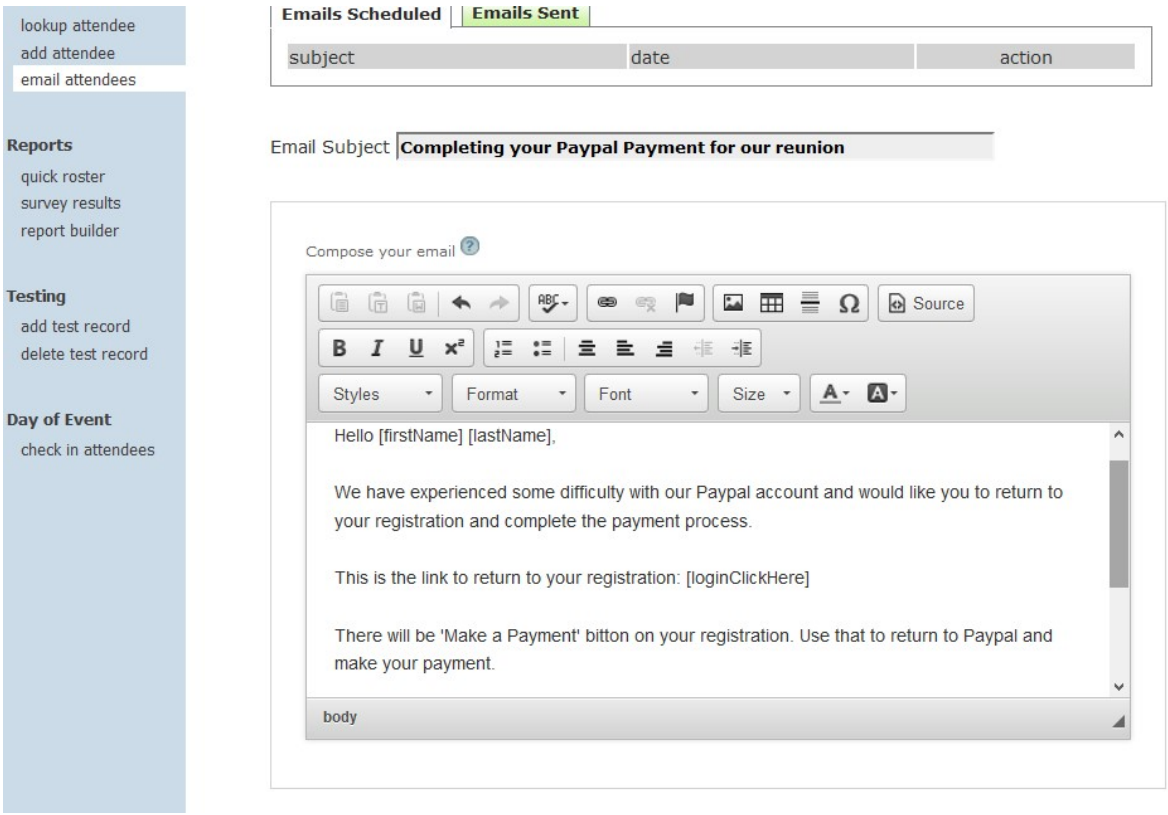
Send To
◉ Only Contacts ○ All Registrants
Only Hold Status

Limit Recipient List By Registration Type
Sustaining or Life Member (10% discount) Early Bird (By 4/15/16)
Member of Household where Primary Member is Sustaining or Life Member (10% discount) - Early Bird - Guest - includes banquet Wednesday evening
Regular Member (After 4/15/16)
Member of Household where Primary member is a Regular Member - (after 4/15/16)

Limit Recipient List By Balance Due

Send Email:
◉ Now
- or -
○ on January 1 2014 at 1 : 00 am
- or -

You should formulate an email that will make it easy for the registrant to log into their registration and make a payment - an example:



Here is that text in a copyable format:

Hello [firstName] [lastName],

We have experienced some difficulty with our Paypal account and would like you to return to your registration and complete the payment process.

This is the link to return to your registration: [loginClickHere]

There will be 'Make a Payment' button on your registration. Use that to return to Paypal and make your payment.

Thanks,
Mabel Abercrombie 555-782-9838

Of course you want to doubly sure that everything is OK before you send this email.

See also

Paypal Instant Payment Notification
Have a non profit - get a break from Paypal
Paypal PRO

Home > Other Management tasks > Paypal issues > Have a non profit - get a break from Paypal

Have a non profit - get a break from Paypal

If you are a legitimate non profit organization with the appropriate 501-C3 paperwork, you are eligible to go through Paypal's non profit application process.

It is best to do all of your non profit paperwork before setting up your Paypal account.

The note below is from one of Paypal's on line forums:

Re: Starting a non-profit. New account or subaccount?
Mar-21-2010 10:51 AM

If you already have a Personal Account, then you can also have either a Premier or Business Account. What you cannot do is have the same bank account and/or credit card linked to the two PayPay Accounts. As a legit non-profit organization, you should have a PayPal Business Account. You should also consider a separate bank account and credit card, it will make accounting much easier down the road. Using your personal bank account can get messy. As for the 501c3 status, you must submit that info first in order to qualify for the lower fees, else you will be charged the current standard fees until you successfully complete the registration process. Also note, you're better off getting your organzation totally setup first, the forming of the corporation first, etc., then opening your new PayPal Account. Else going back and trying update your PayPal Account after the fact may cause a few hassles. Not that you cannot do it that way but, you've been warned.

There is a significant discount in credit card processing fees for non profits - it is worth the effort.

See also
Paypal Instant Payment Notification
When my Paypal fails
Paypal PRO

Home > Other Management tasks > Paypal issues > Paypal PRO

Paypal PRO

You may want to consider signing up for Paypal Pro.

This is a service of Paypal whereby your registrants can choose to pay by credit card and they will only see information required for entering a credit card rather than the usual Paypal screen which can be confusing.

Registrants have to read the screen and recognize the link to pay by credit card rather than use their Paypal account.

We provide a Paypal Pro interface.

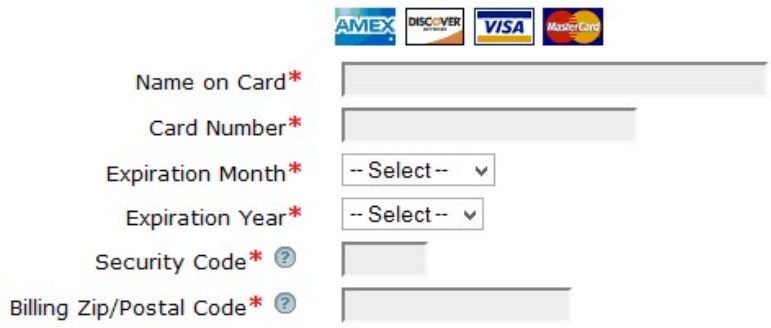
Paypal Pro has some advantages over a regular merchant account. Merchant account may have a tedious application process, long term (usually 2 years) commitment and stiff cancellation penalties.

Paypal Pro is relatively easy to acquire, is priced competitively ($30.00 per month), no long term commitment and no cancel fees. The per transaction fee and percentage is similar to other internet gateway fees.

Your registrants can still have a pay by Paypal check box, but they will be assumed to want to pay with their Paypal account rather than a credit card.

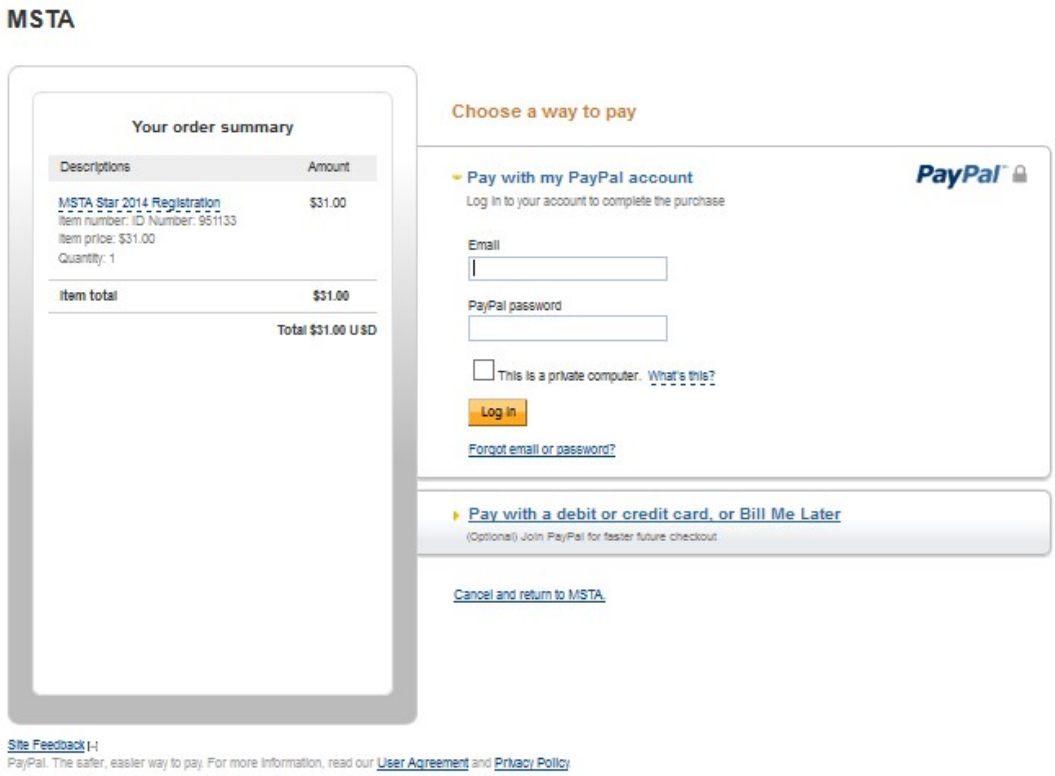
If you use Paypal Pro, you will be able to ask simply for credit card type and your registrant will see no reference to Paypal (you may also allow payments with a Paypal account).

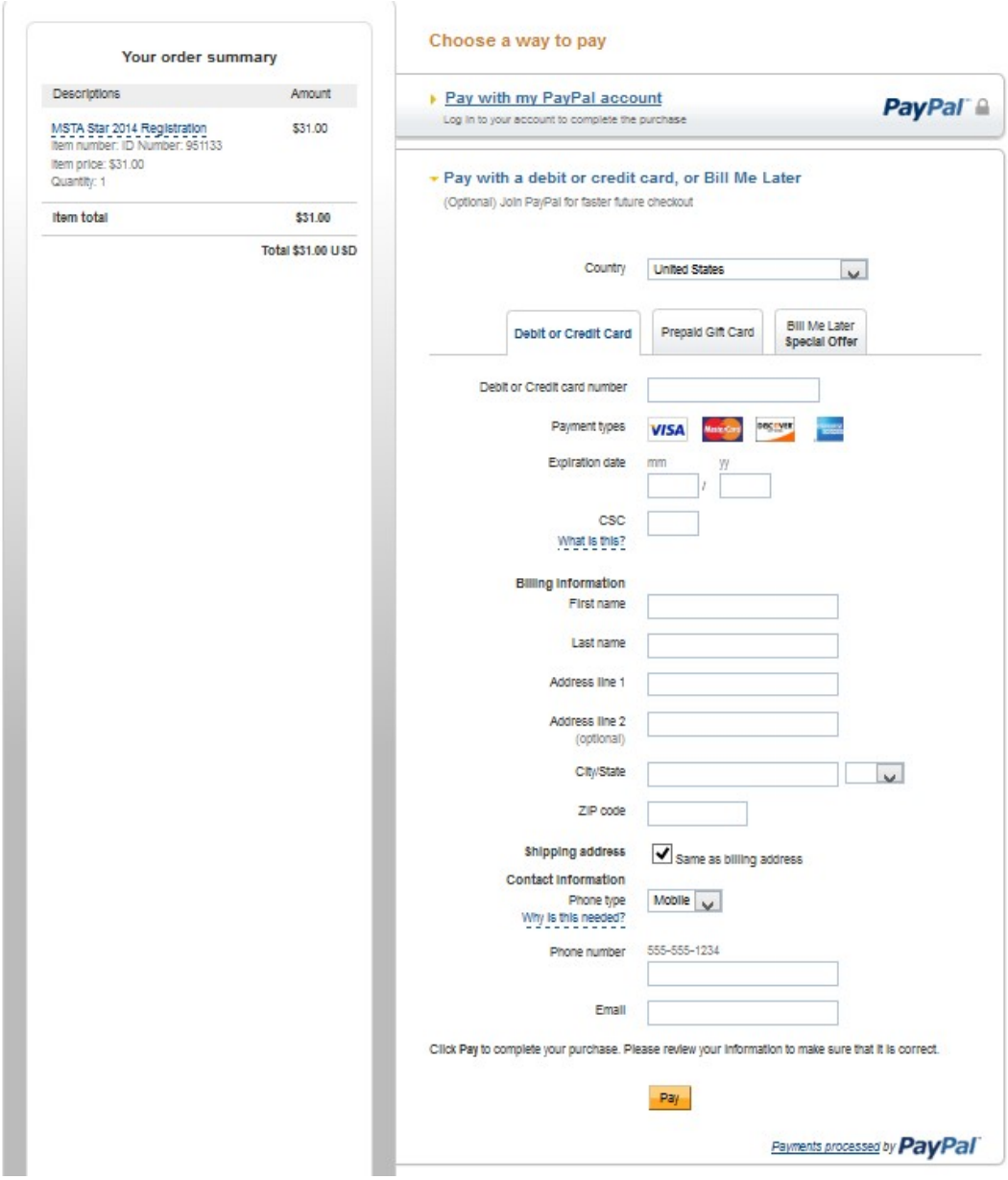
To give you an idea of these accounts differ, this is what a Paypal Pro registrant sees:



Continue

This is what a Paypal business or Premier account sees:





You can see how much simpler the Paypal Pro process is.

See also

Paypal Instant Payment Notification
When my Paypal fails
Have a non profit - get a break from Paypal

Home > Other Management tasks > PlanetReg fee payments

PlanetReg fee payments

You will be invoiced (via email) periodically for your PlanetReg usage.

You can pay via Paypal or by check. There will be a link on your invoice if you wish to pay with Paypal.

When you log into your account and click the my account link, you will a series of links on the right side of the page:

The make a payment link will transfer you to Paypal where you can make a payment either with Paypal funds or a credit card.

If you click the financial review link, you will be shown the current status of your account:

ID	Date	Type	Event	Amount
116	5/12/2010 4:22:31 PM	Check Payment	N/A	$34.00
90	5/3/2010 3:17:11 PM	Invoice	Mile High Bass Camp/Groove Workshop	$16.00
86	5/3/2010 3:16:20 PM	Invoice	Mojo's Music Summer Camp	$18.00

(click on ID to view transaction details)

If you click on any of the ID links, you will see a detail of that transaction:

ID	116
Client Code	C41185052201
Event Code	
Transaction Type	Check Payment
Transaction Date	5/12/2010 4:22:31 PM
Amount	$34.00
Tax	$0.00

Please keep up to date on your PlanetReg fees.

Most of our clients collect these fees on top of their registration fees, so you are basically collecting our fee from each of your registrants.

If you are operating your event in a currency other than US dollars, you will still be invoiced in US dollars. You can pay in US Dollars via Paypal regardless of your home currency and that is probably the best way to pay us.

If you are having any problems paying us, you can always pay us directly through Paypal by using our Paypal email:

paypal@planetreg.com

If you have any questions, please give us a call or an email.

See also

Basic vs Pro Mode
Multiple Events: Lookup Attendee and ME Reports
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My account settings
Create landing page
Dynamic event display on landing page
Make a Payment
Upload files
Financial review
Advanced reports
Attendee Financials
Fee Summary
Status Codes
Waitlist considerations
Record attendance
Pre Populate Forms (API)
Inventory control
Paypal issues
Creating reports in Excel

Creating reports in Excel

Creating reports from registration data is relatively straight forward using Excel spreadsheet software.

You do not have to be an expert in Excel, but it will help to know a few of the basics.

One of the most powerful tools available in Excel is the Pivot Table. Spend a few minutes learning how to create Pivot Tables and you are on your way to creating meaningful and easy to use reports.

The primary purpose of Pivot Tables is count your stuff.

Click the link below for a brief tutorial on using Pivot Tables:

excel_pivot_tables.pdf

And here is an example using actual registration data. The objective of this Pivot Table is to produce a count of T shirts by grade for a Vacation Bible School:

Here is an example of how to create simple listings using Excel:

You will note that the steps in both cases involve removing unwanted columns and/ or rows, then concentrate on just the columns you need. If you save your initial download as an Excel spread sheet, you can re-access it and build mutliple reports - one at a time by deleting columns that are not relevant for a particular report.

You will note also, that the column headings can be quite lengthy - they match the field names you used - shorten them for a smaller, easier to read report. It may be a good idea to shorten relevant headings, then save just the headings as a separate sheet, which can then be pasted into each report without having to rekey column headers.

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See also

Basic vs Pro Mode
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Status Codes
Waitlist considerations
Record attendance
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Paypal issues
PlanetReg fee payments

Home > FAQ

Articles in this section


Fees


Setup


Operation


Paypal


Email

See also

Fees
Setup
Operation
Paypal
Email

Home > FAQ > Fees

Fees

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
Fees: I inadvertantly add a test record while my event was Open
Fees: Does PlanetReg ever collect money directly for an event
Fees: Am I charged for HOLD status registrants
Fees: I don't collect money through PlanetReg, do I still pay PR fees
Fees: What do you mean by 2 percent of checkout amount
Fees: How do I pay my PlanetReg service fees
Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Home > FAQ > Fees > Fees: Can I eliminate ads from my free event

Fees: Can I eliminate ads from my free event

Yes - the ads are a way to generate some revenue from free events.

We will eliminate the ads for a payment of $.50 (fifty cents) per check out.

This cannot be charged as a fee to your registrants, but is paid by the event organizer.

Just click the No ads link on the dashboard.

See also

Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
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Fees: Are PlanetReg service fees adjusted for my currency

Home > FAQ > Fees > Fees: What is your physical business address

Fees: What is your physical business address

We are located at:

5560 Stone Church Ct.
Loveland, CO 80537

We are a totally US based company and have been in business since 1979.

PlanetReg is a product of HEMKO Systems Corporation.

See also

Fees: Can I eliminate ads from my free event
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Fees: When I am in the Preview/Test mode I can see fees being displayed

The system will show you what the fees would be if you were operating with an Open event.

Those fees disappear when you change your event to Open.

Don't forget to delete your test registrants before you open. There is no financial liability for the test registrations, but they do tend to mess up your data if you leave them out there.

See also

Fees: Can I eliminate ads from my free event
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Fees: I inadvertantly add a test record while my event was Open
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Fees: How do I pay my PlanetReg service fees
Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Fees: Is there a monthly cost when I am not using the system

Unless you have agreed to one of our monthly or annual subscription plans, there is no cost when you are not using the system.

See also

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Fees: Are PlanetReg service fees adjusted for my currency

Home > FAQ > Fees > Fees: I cancelled my event, do I still owe PlanetReg fees

Fees: I cancelled my event, do I still owe PlanetReg fees

Yes - PlanetReg provided you a service and is due fees regardless of the disposition of your event.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I inadvertantly add a test record while my event was Open
Fees: Does PlanetReg ever collect money directly for an event
Fees: Am I charged for HOLD status registrants
Fees: I don't collect money through PlanetReg, do I still pay PR fees
Fees: What do you mean by 2 percent of checkout amount
Fees: How do I pay my PlanetReg service fees
Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Home > FAQ > Fees > Fees: I inadvertantly add a test record while my event was Open

Fees: I inadvertantly add a test record while my event was Open

You can freely add test records to an Open event using the 'add test record' link on the administrator dashboard.

However, if you did add a test record, the record will show that you owe us a fee (assuming it is not a free event).

Just drop us an email and we will adjust your charges accordingly.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
Fees: Does PlanetReg ever collect money directly for an event
Fees: Am I charged for HOLD status registrants
Fees: I don't collect money through PlanetReg, do I still pay PR fees
Fees: What do you mean by 2 percent of checkout amount
Fees: How do I pay my PlanetReg service fees
Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Home > FAQ > Fees > Fees: Does PlanetReg ever collect money directly for an event

Fees: Does PlanetReg ever collect money directly for an event

PlanetReg never collects money directly from your registrants.

All money collected goes to you - the organizer/ administrator.

We invoice you for our fees monthly.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
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Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Home > FAQ > Fees > Fees: Am I charged for HOLD status registrants

Fees: Am I charged for HOLD status registrants

You are not charged for HOLD status registrations. Since you have not collected from them yet, we do not charge

until or if they become Active. If they pay you some other way, for example direct to your Paypal account using your Paypal email, you should change their status to Active, enter their Paypal payment See: Attendee maintenance
and send them a confirmation.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
Fees: I inadvertantly add a test record while my event was Open
Fees: Does PlanetReg ever collect money directly for an event
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Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Fees: I don't collect money through PlanetReg, do I still pay PR fees

Regardless of when or how you collect funds for your event, PlanetReg is **ONLY free if your event is free**. That means no money is collected from event registrants.

You can indicate that you are not collecting money on the general tab, insert your registration fee in the registration type fee field and instruct your registrants how to pay you somewhere on the form or confirmation.

The fee you pay PlanetReg will be based on your registration fees.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
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Fees: What do you mean by 2 percent of checkout amount

Unlike most of our competition, we do not charge a separate fee for each item you are selling. Your fee is simply calculated on the final registration amount.

If your registration is $100.00, the PlanetReg service fee is $2.50. These fees are adjusted for the currency you are using.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
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Fees: How do I pay my PlanetReg service fees

You will receive an automatic invoice from PlanetReg on at least a monthly basis. The invoice will always be in US Dollars. You can pay via check (in US Dollars) or via Paypal, which accepts US dollar payments regardless of your home currency.

Please see PlanetReg fee payments for details on how your PlanetReg fees are assessed and collected.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
Fees: I inadvertantly add a test record while my event was Open
Fees: Does PlanetReg ever collect money directly for an event
Fees: Am I charged for HOLD status registrants
Fees: I don't collect money through PlanetReg, do I still pay PR fees
Fees: What do you mean by 2 percent of checkout amount
Fees: Who pays the PlanetReg service fee
Fees: Are PlanetReg service fees adjusted for my currency

Fees: Who pays the PlanetReg service fee

By default, your registrants are charged the PlanetReg service fee when they register. This is just like Ticketmaster and most other on line registration services. However, you can change that and 'bundle' the PlanetReg service fee in your registration fees. That is, you adjust your fee to include any possible PlanetReg service fees. For example, if you were offering an event that normally cost $100.00, you could charge $102.00 and indicate that a fee is not charged to your registrants.

See Service fee for how to do this.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
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Fees: Does PlanetReg ever collect money directly for an event
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Fees: How do I pay my PlanetReg service fees
Fees: Are PlanetReg service fees adjusted for my currency

Fees: Are PlanetReg service fees adjusted for my currency

Yes - when you change your currency - see Service fee - PlanetReg will record a currency conversion rate that will be in effect throughout your event. The 2% of checkout amount remains fixed, however the minimum fee (US$ .50) and maximum fee (US$ 9.00) will be adjusted for your local currency.

For example, the minimum in Euro's would be .38 Euro, maximum 6.70 Euro's. This amount may vary based on current rates. Once an event has been started the fee remains fixed.

See also

Fees: Can I eliminate ads from my free event
Fees: What is your physical business address
Fees: When I am in the Preview/Test mode I can see fees being displayed
Fees: Is there a monthly cost when I am not using the system
Fees: I cancelled my event, do I still owe PlanetReg fees
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Fees: Who pays the PlanetReg service fee

Setup

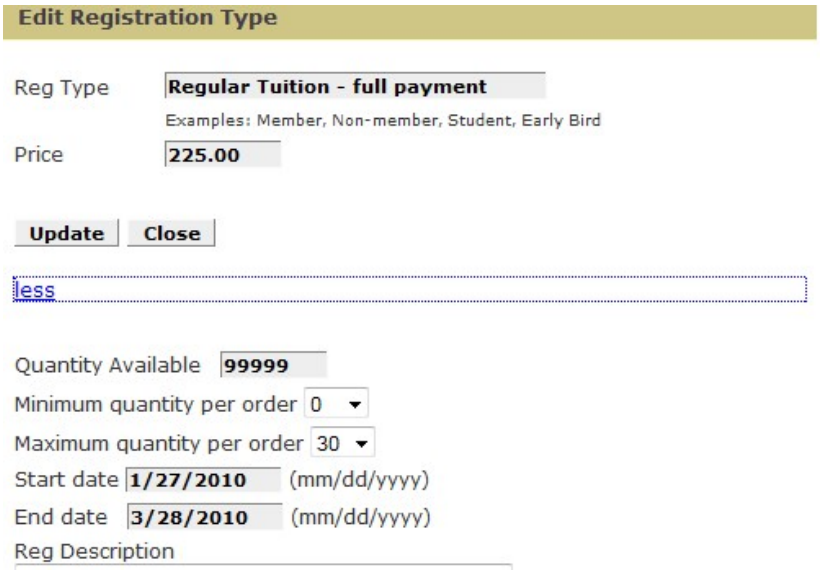
See also

Setup: I need an early bird price

If your event pricing changes through time; i.e. early registrants receive a better price than later registrants, you can accomplish that by specifying the date range for registration types or priced items.

In the case shown above, you can see that the item identified as Regular Tuition is shown as 'Not available'.

This is because this item has a date restriction:



The item will show as Not available until January 27, 2010. On that date, the item will be shown as available.

The Early bird rate shown above also has a date restriction:

This item will show as not available after January 26th, 2010.

Check out the Early bird video:

Show me

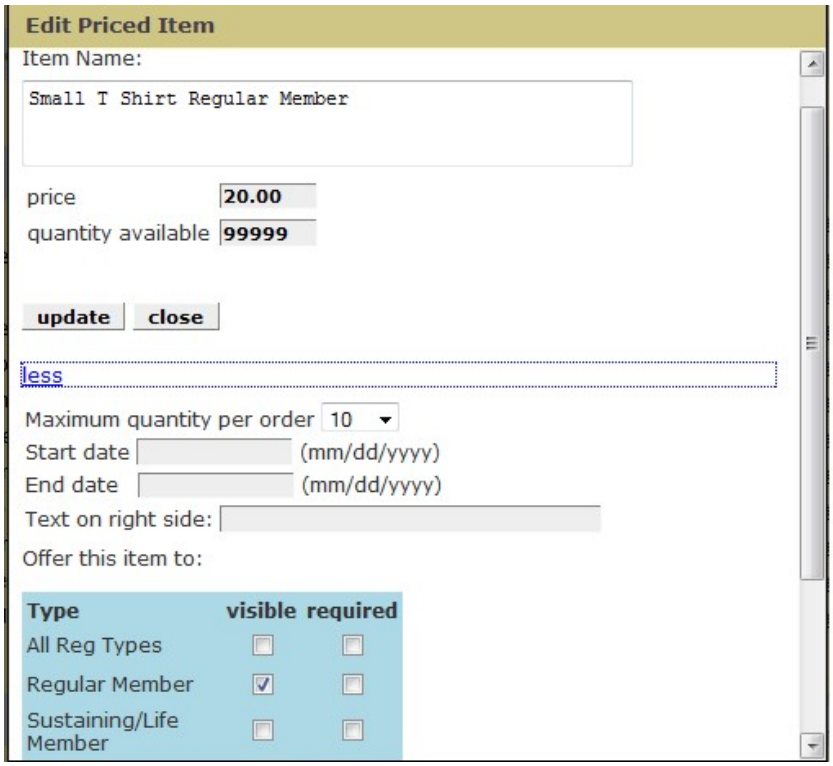
See also

Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
Setup: I need to cut off some items by date
Setup: I see that the quantity shown for registration types is too large
Setup: I am unsure about collect info for one registrant only
Setup: Can I have an event with multiple dates
Setup: Can I have an event with multiple locations
Setup: I would like to add additional graphics to text areas
Setup: I created my event, now what?
Setup: I loaded my logo/picture and it looks wierd
Setup: I can't load my image on the Form header
Setup: I need to change the format of a custom question

Home > FAQ > Setup > Setup: I need different prices for different registration types

Setup: I need different prices for different registration types

When defining priced items, you can expose the items to specific registration types:



Note that this item is 'visible' to Regular Member registration types only. Another registration type, like the Sustaining/ Life Members do not see it. If I have that same item, but different price for the Sustaining/ Life Members, copy the item, change the price and description and make it visible to Sustaining / Life registration types only.

This section of the priced item definition is exposed when you click the more link.

See: Registration type

See also

Setup: I need an early bird price
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
Setup: I need to cut off some items by date
Setup: I see that the quantity shown for registration types is too large
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Home > FAQ > Setup > Setup: There are strange symbols in one of my text fields

Setup: There are strange symbols in one of my text fields

Most likely you have copied and pasted from a word processing program, like MS Word.

The text module cannot accept many of the unique formatting codes associated with word processing programs.

If you need to copy text from a word processor, copy it first to a neutral program like Notepad.

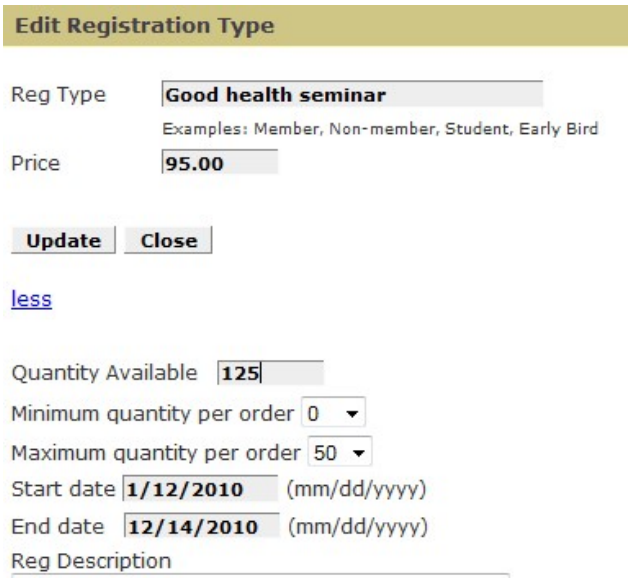
Once in Notepad, all formatting codes are striped and you can use cut and paste to move the text to the system.

See also

Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: I have limited items and need to stop selling when sold out

Setup: I have limited items and need to stop selling when sold out

If you have limited sale items, say seats at a seminar, you can impose that limit at the Registration type level by setting up the quantity available:



The same logic can be applied to priced items on the Questions page:

See: Registration type and Additional (Priced) items

See also

Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I need to cut off some items by date
Setup: I see that the quantity shown for registration types is too large
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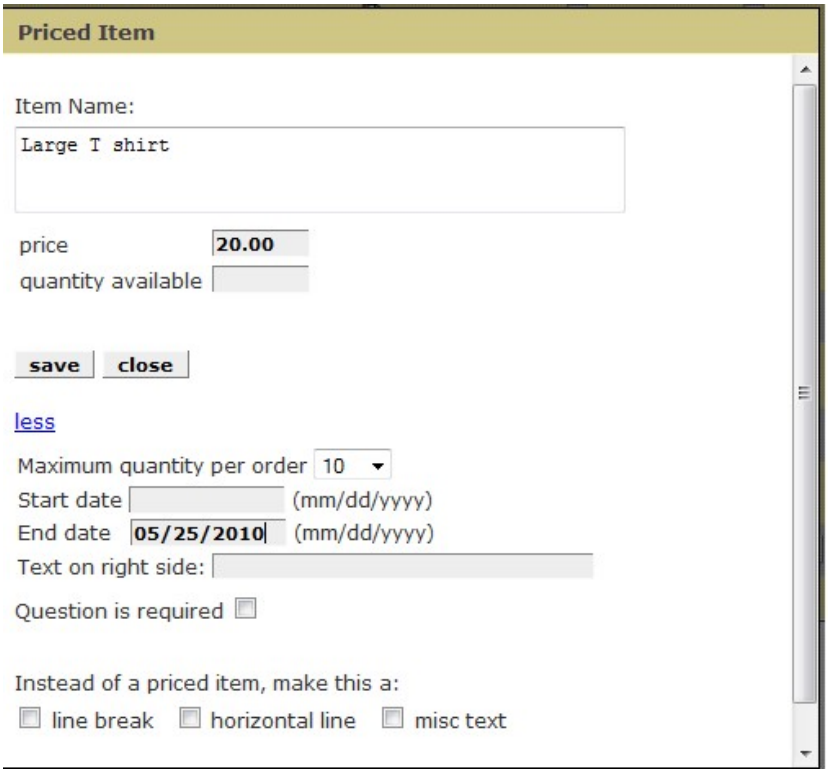
Setup: I need to change the format of a custom question

Setup: I need to cut off some items by date

If you are selling items that have a date cut off, but you wish to accept registrants but exclude those items after a certain date, you can use the date feature on priced items:



In this case, the item will show as Not available after May 25th, 2010.

See: Additional (Priced) items

See also

Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
Setup: I see that the quantity shown for registration types is too large
Setup: I am unsure about collect info for one registrant only
Setup: Can I have an event with multiple dates
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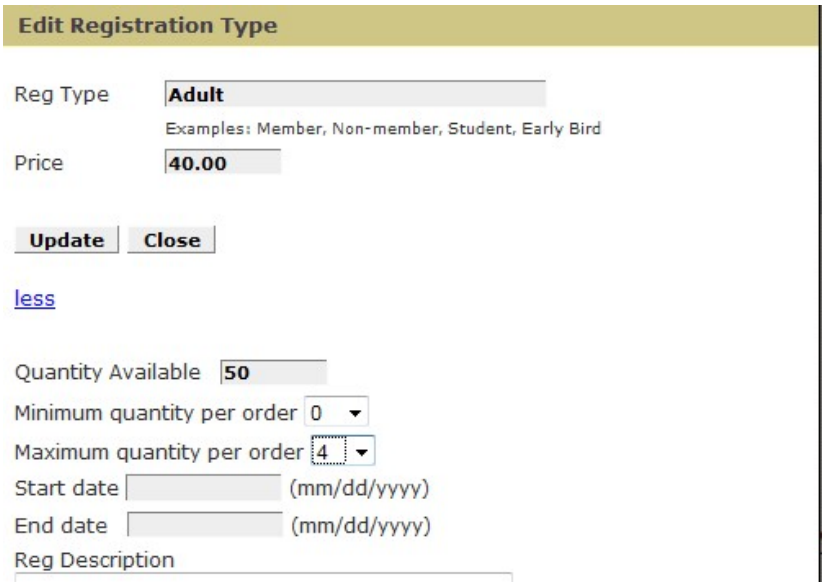
Setup: I created my event, now what?
Setup: I loaded my logo/picture and it looks wierd
Setup: I can't load my image on the Form header
Setup: I need to change the format of a custom question

Setup: I see that the quantity shown for registration types is too large

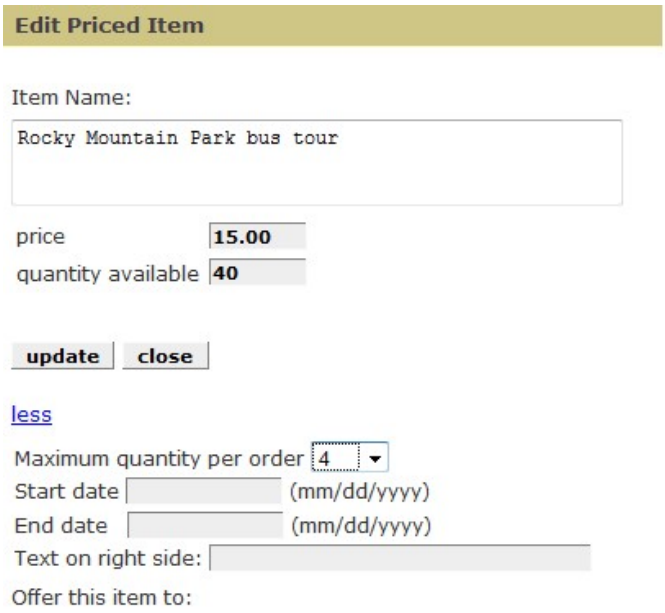
The system defaults the maximum quantity available to 30.

If you want to lower or raise that number, you can do that through the Reg Type data box:



The Maximum quantity per order sets the default quantity when you pick the quantity drop down:

The same logic applies to priced items on the Questions page:



Maximum quantity per order governs the quantity drop down box:

See also

Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
Setup: I need to cut off some items by date
Setup: I am unsure about collect info for one registrant only
Setup: Can I have an event with multiple dates
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Setup: I need to change the format of a custom question

Home > FAQ > Setup > Setup: I am unsure about collect info for one registrant only

Setup: I am unsure about collect info for one registrant only

Generally, if you are selling a thing like tickets, pizza slices, etc. You will want to collect information for a single registrant or buyer.

If you are registering people for your event; i.e. a reunion, camp, outing, seminar, etc. you will want to collect information for each registrant.

See: Collect info for one registrant only

Or you can check out the video examples:

Show me

See also
Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
Setup: I need to cut off some items by date
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Setup: I can't load my image on the Form header
Setup: I need to change the format of a custom question

Home > FAQ > Setup > Setup: Can I have an event with multiple dates

Setup: Can I have an event with multiple dates

Yes - you can use a landing page to direct your registrants to events that occur on different dates (each date must be a separate event) or you can use the registration type (on the Layout page) and add a registration type for each individual date of your events.

The second method implies that you do not need automated reminders (you can send them manually if needed). Also, in this case, you may want to hide the 'When' box, or just show a date range.

See also
Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
Setup: I need to cut off some items by date
Setup: I see that the quantity shown for registration types is too large
Setup: I am unsure about collect info for one registrant only
Setup: Can I have an event with multiple locations
Setup: I would like to add additional graphics to text areas
Setup: I created my event, now what?
Setup: I loaded my logo/picture and it looks wierd
Setup: I can't load my image on the Form header
Setup: I need to change the format of a custom question

Home > FAQ > Setup > Setup: Can I have an event with multiple locations

Setup: Can I have an event with multiple locations

Yes - usually the best way to do this is make a copy of your event for each different location.

When you publish your event, you can specify each location and provide a different link to that location.

Also - consider using a Landing Page to present multiple events in a convenient way - see Create landing page

See also
Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
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Setup: I need to change the format of a custom question

Home > FAQ > Setup > Setup: I would like to add additional graphics to text areas

Setup: I would like to add additional graphics to text areas

If you have web access to the graphic file, you can link to it by selecting the Insert image icon in the editor.

You can also download your graphic as a file and insert it into your text area - see:

Upload files

See also

Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
Setup: I have limited items and need to stop selling when sold out
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Setup: I can't load my image on the Form header
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Setup: I created my event, now what?

You have gone through the all of the set up tasks:

The next step or steps should be to review all of the pages and/or preview your event by adding a test registration.

You can edit/ change any of these sections, in any order.

You can also do them multiple times until your event looks and acts the way you want it to.

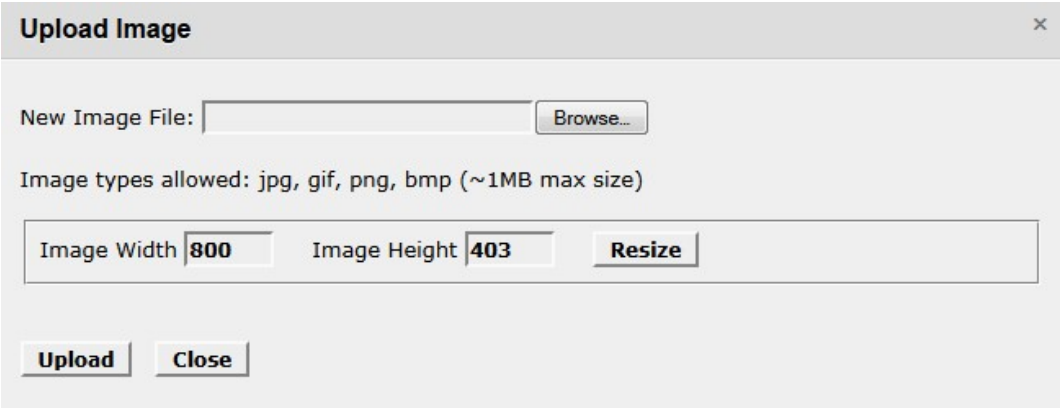
See also

Setup: I need an early bird price
Setup: I need different prices for different registration types

Setup: I loaded my logo/picture and it looks wierd

Sometimes the characteristics of a .jpg or other type of picture file do not fit well in the narrow space for the form header.

Many times you can successfully adjust the picture size by changing the horizontal and vertical pixel size of the picture:



Try adjusting the Image Width and Image Height. Be sure to press the Resize button when you are done.

Note that if you upload a very large image, it may work OK, but will make your form load quite slowly.

See also

Setup: I need an early bird price
Setup: I need different prices for different registration types
Setup: There are strange symbols in one of my text fields
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Setup: I need to cut off some items by date
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Setup: I need to change the format of a custom question

Setup: I can't load my image on the Form header

If for some reason you are having a problem loading your logo or picture on the Form page, please take a look here:

Upload image

In general, we have found that .jpg format images always work fine. If in doubt, save as .jpg.

See also

Setup: I need an early bird price

Setup: I need to change the format of a custom question

I defined my custom questions using a check box/drop down/radio button and can see now that it is not what I wanted.

If you already have registrations, you can't change the type of custom questions from one format to another.

If all of your registrations are Preview/ Test registrations, just delete them - See: Delete test registrations

If you have registrations that are NOT all test registrations, you can add a new/ revised custom question and Disable the existing one.

See also: Disabling a question or additional item

See also

Operation

See also

Operation: I made a mistake and need to STOP registrations

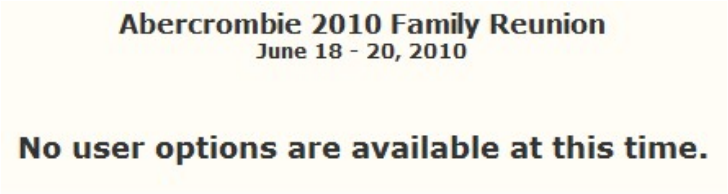
You have just discovered that you have a flaw in your event set up.

You want to temporarily suspend offering your event while you fix the flaw / error.

The easiest way to do this is to change the status to Closed using the Event Home screen:

Once you have corrected your form, set the status back to Open.

While the event is Closed, your attendee prospects will see this screen:



See also

Operation: I see attendees with HOLD status, what does that mean
Operation: I have my own merchant account - can I use it
Operation: My survey seems to be inoperative
Operation: Does PlanetReg do anything with my registrant data, including emails
Operation: I checked do not allow duplicates but I still get duplicate registrations
Operation: How long is my data available
Operation: I seem to have problems when I have two sessions of PlanetReg on my computer
Operation: Can I reinstate a cancelled registration
Operation: My Register button does not work on my website
Operation: My registrants are getting a session time out
Operation: Why is a payment option showing up on my free event
Operation: My event shows No User Options Available
Operation: I need to add a check received for payment
Operation: Can I print badges
Operation: My inventory does not work
Operation: How do I cancel an attendee
Operation: Which browsers work best for PlanetReg
Operation: I need to stop offering a registration type
Operation: I created my event but it is asking for too much data.

Operation: I see attendees with HOLD status, what does that mean

Hold - the registrant has successfully registered, but has not completed the Paypal payment section. This is often seen when a registrant has abandoned the Paypal screen and may or may not have returned to the registration. In all cases, PlanetReg sends a preliminary confirmation to the registrant stating:

This is an automatically generated message. DO NOT REPLY TO THIS EMAIL.

Attention: This registration will be in Hold status until payment is received.

Normally, no details of the registration are shown.

Any registrant who chooses the Paypal payment option will receive this preliminary email. This is because the Paypal payment screen can be abandoned with the registrant leaving their payment status unknown.

If the registrant returns to your event and looks up their registration, they will see:

Financials

Transaction ID	Description	Date	Amount
6860	Invoice	1/20/2010 1:08:01 PM	$56.10
6862	Paypal Payment Initiated	1/20/2010 1:08:01 PM	($56.10)
Balance Due			$56.10

Make a payment

The financial section indicates that a Paypal payment was initiated. There is also a Make a payment link that will lead the attendee to a screen where they can continue on to Paypal again, or choose another payment type (if available).

See also: Status Codes and Paypal issues

See also

Operation: I made a mistake and need to STOP registrations
Operation: I have my own merchant account - can I use it
Operation: My survey seems to be inoperative
Operation: Does PlanetReg do anything with my registrant data, including emails
Operation: I checked do not allow duplicates but I still get duplicate registrations
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Operation: Why is a payment option showing up on my free event
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Operation: I need to stop offering a registration type
Operation: I created my event but it is asking for too much data.

Home > FAQ > Operation > Operation: I have my own merchant account - can I use it

Operation: I have my own merchant account - can I use it

Yes - we will need to get the specifics of your internet credit card processor.

You can email or call us and we can let you know what we need.

In this case, you will have a new Payment type:

Credit card and the ***Paypal/Credit card*** payment type will become ***Paypal*** only.

See also

Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
Operation: My survey seems to be inoperative
Operation: Does PlanetReg do anything with my registrant data, including emails
Operation: I checked do not allow duplicates but I still get duplicate registrations
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Operation: Can I print badges
Operation: My inventory does not work
Operation: How do I cancel an attendee

Operation: Which browsers work best for PlanetReg
Operation: I need to stop offering a registration type
Operation: I created my event but it is asking for too much data.

Operation: My survey seems to be inoperative

It is critical that your event be Open and that the event close date be greater than your survey gathering date/ days.

If not, your survey will not function.

See: Edit Survey

See also

Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
Operation: I have my own merchant account - can I use it
Operation: Does PlanetReg do anything with my registrant data, including emails
Operation: I checked do not allow duplicates but I still get duplicate registrations
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Operation: Does PlanetReg do anything with my registrant data, including emails

We do nothing with your data, including email addresses provided by your registrants.

We may occasionally contact you as the administrator with suggestions and company communications of interest to you. Any periodic communication will always include on opt out option.

See also

Operation: I made a mistake and need to STOP registrations
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Operation: I checked do not allow duplicates but I still get

duplicate registrations

The system uses the email address to check for a duplicate.

If the same email address is found, the registrant is warned and must click through a warning box to continue.

The system does not stop the registrant from continuing, but makes it clear that a duplicate is being entered.

See also

Operation: I made a mistake and need to STOP registrations
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Operation: How long is my data available

We highly recommend that you download all of your data when your event is completed.

As of current time, your data will be available on our system for at least 18 months.

If this is an issue, please contact us.

See also

Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Operation: I seem to have problems when I have two sessions of PlanetReg on my computer

You cannot run more than one session of PlanetReg at a time using the same browser.

PlanetReg makes use of cookies and those cookies 'collide' when running two sessions at once.

You should be able to run two sessions if you use two different browser brands; i.e. Firefox and Internet Explorer or Google Chrome.

See also
Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Operation: My survey seems to be inoperative
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Home > FAQ > Operation > Operation: Can I reinstate a cancelled registration

Operation: Can I reinstate a cancelled registration

Yes - see:

See Attendee maintenance

If you select Change Status and the registration is Cancelled, there is a button to reinstate the registration.

See Report Builder for how to get a list of cancelled registrations.

See also
Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Home > FAQ > Operation > Operation: My Register button does not work on my website

Operation: My Register button does not work on my website

Most likely your web site is using a web authoring system that does not accept pure html code.

One of the most popular is WordPress.

To see the solution to a register button on a WordPress site, see Publish event

See also
Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Operation: My survey seems to be inoperative
Operation: Does PlanetReg do anything with my registrant data, including emails
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Operation: I need to add a check received for payment
Operation: Can I print badges
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Operation: I created my event but it is asking for too much data.

Operation: My registrants are getting a session time out

This is usually an indication that you are trying to run PlanetReg in what is called an Iframe.

PlanetReg will not work well within an Iframe. Please provide a direct link to your PlanetReg event, outside of Iframe's. Paypal will not function at all from within an Iframe.

See also

Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Operation: Why is a payment option showing up on my free event

If your event is free, use the General link on the setup tab to:

> Check the Yes button on 'Will you be collecting money'.
> Make sure all of the payment type check boxes are unchecked.
> Check the No button on 'Will you be collecting money'.

If that does not fix the problem, please contact us.

See also

Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Operation: My survey seems to be inoperative
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Operation: My event shows No User Options Available

If this situation is not intended, here is a checklist of things to check:

1. My event has reached the End Sales or Close site dates - see Setup/ Extras tab,

   See Close dates

2. My registration types have either:

   Exhausted available inventory
   Have reached end dates specified in the registration type definition
   Have yet to reach start dates specified in the registration type definition

   See Registration type

3. Your account may be suspended due to non payment.

See also

Operation: I made a mistake and need to STOP registrations
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Operation: I need to add a check received for payment

Retrieve the attendees registration using:

Attendee lookup or Roster report

Once you have the attendee, look at:

Attendee maintenance

For detailed instructions on how to add a check or other financial transaction.

See also

Operation: I made a mistake and need to STOP registrations
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Operation: Can I print badges

Yes - although not directly through PlanetReg. You can create a spreadsheet of your registrants, see Roster report, then merge that spreadsheet using Word or similar. You can buy blank badge stock at your local stationery store. Almost all word processing programs have badge stock templates built in.

See Name Badges for an example of using Microsoft Word to create name badges.

If you need help with this, just let us know.

See also

Operation: I made a mistake and need to STOP registrations
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Operation: My inventory does not work

You are able to control the number of items and/or registration types being sold.

If it appears that you are sold out of something before you are actually sold out, it is usually because you have left Preview/ Test registrations in your event.

Delete the test registrations (they deduct from inventory), and you should be OK.

See also: Delete test registrations

See also

Operation: I made a mistake and need to STOP registrations
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Operation: How do I cancel an attendee

The attendee maintenance section will show you how to change an attendees status, including canceling an attendee.

See: Attendee maintenance

See also

Operation: I made a mistake and need to STOP registrations
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Operation: Which browsers work best for PlanetReg

PlanetReg should work fine in all browsers, however we have found that Firefox and Chrome work better and more consistently than others.

See also

Operation: I made a mistake and need to STOP registrations
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Operation: I need to stop offering a registration type
Operation: I created my event but it is asking for too much data.

Operation: I need to stop offering a registration type

You can always 'turn off' a registration type by entering a past date in the end date box:

less

Quantity Available 999
Minimum quantity per order 0
Maximum quantity per order 50
Start date 11/23/2009 (mm/dd/yyyy)
End date 6/20/2010 (mm/dd/yyyy)
Reg Description

See also: Registration type

See also

Operation: I made a mistake and need to STOP registrations
Operation: I see attendees with HOLD status, what does that mean
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Operation: My survey seems to be inoperative
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Home > FAQ > Operation > Operation: I created my event but it is asking for too much data.

Operation: I created my event but it is asking for too much data.

If, when you Preview your event, it appears that your registration is requesting too much data (i.e. I just need a single name and address), you probably forgot to indicate on the Questions page how to collect data:

preview | hide tips

Select the questions to be used below. To create your own, use Custom Questions. For items with a price, use Additional Items. Click here to control who should answer these questions. Click here to preview this page.
next

collect information on this page from:
all attendees only the attendee that is paying (if there is a fee) save

You probably need to change the selection to:

Only the attendee that is paying

See also: Collect info for one registrant only

See also

Operation: I made a mistake and need to STOP registrations
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Operation: My survey seems to be inoperative
Operation: Does PlanetReg do anything with my registrant data, including emails
Operation: I checked do not allow duplicates but I still get duplicate registrations
Operation: How long is my data available

Paypal

See also

Paypal: Why use Paypal

Paypal is the easiest and cheapest way to get paid for your events. Set up is sinple, you can accept credit cards, you get paid immediately. Paypal credit card and transaction fees are very low when compared to the rest of the industry.

Paypal fees are about 3% of a transaction amount. This is the same whether a credit card is used or not.

PlanetReg will allowd you to add a 'handling fee' or 'service charge' to recover this fee from your registrants.

Remember that Paypal requires a Premier or Business account to use credit cards.

All third party credit card processors require a monthly fee, a business application and transaction fees that average 3-5% depending on the type of credit card used.

See also

Paypal: I seem to be having problems with Paypal

Paypal issues are discussed in: Paypal issues

See also

Paypal: How much does Paypal cost

Generally, Paypal charges 2.9% plus US$ .30 per transaction.

This is regardless of whether the registrant pays with a credit card or from their own Paypal account. Paying from your Paypal account means drawing the funds on deposit with Paypal, or funds from the members bank account if the member is a Premier or Business member.

If the member is a 'regular' member and they do not have funds on deposit with Paypal, they must have a credit card on file.

In all cases, a Paypal member can choose to not log into their Paypal account and simply use a credit card to pay for a transaction.

It is a good idea to erase your email from the Paypal payment screen if you wish to pay by credit card.

Note that you must have a Premier or Business account for people to pay you with a credit card. If you have only a personal account, people can only pay you with their own Paypal funds (Funds on deposit with Paypal).

For more information on Paypal fees:

Paypal Fees

See also

Paypal: Why use Paypal
Paypal: I seem to be having problems with Paypal
Paypal: Why is Paypal saying I must access Paypal via an encrypted button
Paypal: How do I tell someone to redo Paypal
Paypal: How do I see what type of Paypal account I have

Paypal: Why is Paypal saying I must access Paypal via an encrypted button

This is a setting in your Paypal profile that must be changed.

See: Paypal issues

See also

Paypal: Why use Paypal
Paypal: I seem to be having problems with Paypal
Paypal: How much does Paypal cost
Paypal: How do I tell someone to redo Paypal
Paypal: How do I see what type of Paypal account I have

Paypal: How do I tell someone to redo Paypal

The system sends an email to each registrant just before they enter Paypal. When we pass control to Paypal, we have effectively lost control until the registrant either completes a payment or clicks the return link.

That email contains instruction to the registrant on how to return to their registration and complete a payment (or choose another payment method).

See Paypal issues

See also

Paypal: Why use Paypal
Paypal: I seem to be having problems with Paypal
Paypal: How much does Paypal cost
Paypal: Why is Paypal saying I must access Paypal via an encrypted button
Paypal: How do I see what type of Paypal account I have

Paypal: How do I see what type of Paypal account I have

Log into your paypal account.

Below your name, you will see a description of your account and whether it is verified or not.

Verified means that Paypal has established that you have a bank account.

PlanetReg only works with Paypal accounts that have been verified; Premier or Business account.

If your account shows 'Personal' it will not work with PlanetReg.

A business account is the best. There is no charge to upgrade your account.

See also
Paypal: Why use Paypal
Paypal: I seem to be having problems with Paypal
Paypal: How much does Paypal cost
Paypal: Why is Paypal saying I must access Paypal via an encrypted button
Paypal: How do I tell someone to redo Paypal

Home > FAQ > Email

Email

See also
Email: I don't seem to be getting an email for every confirmation
Email: I need to send more than one email reminder
Email: My email has changed, what do I do now
Email: I get an invalid email address when I fill out the question section of my forms

Home > FAQ > Email > Email: I don't seem to be getting an email for every confirmation

Email: I don't seem to be getting an email for every confirmation

This can be due to a couple of things:

On the Edit confirmations page, the email copy is incorrect:

If the email is correct, then the emails are probably being filtered out by your junk mail or spam filter.

Make sure you have this email address in your contact list or 'white' list:

confirm@planetreg.com

See also
Email: I need to send more than one email reminder
Email: My email has changed, what do I do now
Email: I get an invalid email address when I fill out the question section of my forms

Home > FAQ > Email > Email: I need to send more than one email reminder

Email: I need to send more than one email reminder

When you step through the Setup procedure for your event, you are offered an opportunity to set up a reminder email.

If you need more than one reminder, use the email attendees function to schedule as many future emails as needed. These emails can be set to sent at any future date and time.

See Email Attendees

See also

Email: I don't seem to be getting an email for every confirmation
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Email: I get an invalid email address when I fill out the question section of my forms

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Email: My email has changed, what do I do now

Log into your account, click on the 'my account' link, change the account email and click the update link.

The next time you log in, use your new email as the login ID.

See also

Email: I don't seem to be getting an email for every confirmation
Email: I need to send more than one email reminder
Email: I get an invalid email address when I fill out the question section of my forms

Home > FAQ > Email > Email: I get an invalid email address when I fill out the question section of my forms

Email: I get an invalid email address when I fill out the question section of my forms

Most likely you have used the field renaming capability of standard questions and have renamed either the email field or the 'email for verification' field.

These fields are special and cannot be renamed - only used for their specific purpose.

See also

Email: I don't seem to be getting an email for every confirmation
Email: I need to send more than one email reminder
Email: My email has changed, what do I do now

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