How to Record Offline Registrations and Payments for Paid Events

Introduction

Imagine you may be organizing an event in which you'll charge money for various items. Could be event registration, ads for a program book, or food. You can set up an online event registration form to capture this information as people register themselves through your web site.

What if you are the one that is actually registering participants? Here's the scenario: You are doing outreach for your event and someone asks you to register them and purchase an ad for your program. They'll send a check later. This document explains how you can easily do this in PowerBase. It's called an offline event registration. (By the way, when we say "offline" it actually is online. You are just not using the event registration form. You are entering this when you are signed in through your PowerBase.)

To record offline event registration for a paid event, you have several possible situations: You have the credit card, or you have a check, or they will be paying later, but you want to add them to the registration now. We'll go through the steps for each of these in turn.

Paying by Credit Card

1) Find the person's contact record. If they are not in the system, add them as an individual.
2) Click on the "Events" tab.
3) Select "Submit Credit Card Event Registration"
4) Complete the form
    a. Select the payment processor, if the default one is not the correct one.
    b. Select the event. If it's a paid event, the payment options will appear.
    c. Select the appropriate payment options
    d. Enter the credit card information.
    e. Save your entries. The credit card will be charged immediately. A contribution record will be created.

Paying by Check or cash when you have the funds in hand

1) You have multiple options for entering the event registration.
    a. You can go to the event menu and select the event registration menu item. "Register Event Participant" or
    b. You can go to the individual's record and click the "Actions" button and select the option to "Register for Event"
    c. You can go to the individual's record and click on the Events tab and click the "Add Event Registration"
2) Select the event. The page will populate with some default settings.
    a. Accept defaults for Campaign and Participant Roles
    b. Leave Participant Status at "Registered"
    c. Select the appropriate ticket payment options
    d. Check Record Payment if it's not checked.
    e. Enter Paid By (check or cash)
    f. Enter Check number if applicable.

g. Save your entries. A contribution record will be created.

Paying by Check or cash when you DO NOT have the funds in hand

1) You have multiple options for entering the event registration.
   a. a) You can go to the event menu and select the event registration menu item. "Register Event Participant" or
   b. b)You can go to the individual's record and click the "Actions" button and select the option to "Register for Event"
   c. c) You can go to the individual's record and click on the Events tab and click the "Add Event Registration"
2) Select the event.
   a. Accept defaults for Campaign and Participant Roles
   b. Change Participant Status to "Pending from pay later"
   c. Select the appropriate ticket payment options
   d. UNCheck Record Payment

Recording Payment for a pending registration.

If someone has registered online or if you've registered them offline, you can return to the participant record and record payment.

1) You have multiple ways of finding the pending event registration.
   a. You can go to the event from the events dashboard and select "Pending from Pay Later" to get a list of pending registrations.
   b. You can go to the contact record and go to their event tab.
2) Click edit on the Participant Record.
3) Change Participant status to "Registered"
4) Click "Record Payment?" check box
5) Record the payment details
6) Save your entries.