

PCO Hacks

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Enhancing PCO Address Data with ZIP+4 and Political Districts via Geocodio

This guide outlines the process of exporting address data from PCO, enriching it with ZIP+4 and political district information using Geocodio, and importing the enhanced data back into PCO.

1. ?? Set Up Custom Fields in PCO

Before importing enriched data, ensure that PCO has custom fields to store the new information:

1. Navigate to the **People** tab in PCO.
2. Click the **gear icon (⚙️)** and select **Customize Fields**.
3. Create a new **Custom Tab** (e.g., "Political Units").
4. Within this tab, add the following **Text** fields:
 - ZIP+4
 - Congressional District
 - State Legislative District House Name
 - State Legislative District Senate Name

Ensure these fields are saved and ready for data import.

2. ? Export Address Data from PCO

Option A: Export Entire Database

1. In the **People** tab, click the **gear icon (⚙️)** and select **Import/Export CSV**.
2. Click **Start Export** to generate a CSV file containing all profiles.
3. The CSV file will be emailed to you; download it from your inbox.

Option B: Export a Specific List

1. Navigate to the **Lists** tab in PCO.

2. Select the desired list or create a new one based on specific criteria.
 3. Once the list is generated, click the **download icon**.
 4. Choose to export all data on the people listed or only the data shown in the columns.
 5. If your list has fewer than 500 results, the CSV will automatically download; otherwise, it will be emailed to you.
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3. ? Prepare the CSV for Geocodio

1. Open the downloaded CSV file in a spreadsheet program (e.g., Excel, Google Sheets).
2. Ensure the following address columns are present and correctly labeled:
 - First Name
 - Last Name
 - Street Address
 - City
 - State
 - ZIP Code
3. Clean the data by removing any incomplete or improperly formatted addresses.

“ **Note:** PCO matches records during import based on **First Name** and **Last Name**. Ensure these fields are included and accurately maintained to prevent duplicate records.

4. ? Upload to Geocodio for Data Enrichment

1. Visit [Geocodio's upload page](#).
 2. Upload your prepared CSV file.
 3. During the upload process:
 - Map your columns to the appropriate address fields.
 - In **Step 3**, select the following data appends:
 - **ZIP+4 Code**
 - **Congressional District**
 - **State Legislative Districts**
 4. Proceed to process the file and download the enriched CSV upon completion.
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5. ? Prepare the Enriched CSV for PCO Import

1. Open the enriched CSV file.
 2. Ensure the following columns are present and correctly labeled to match your PCO custom fields:
 - First Name
 - Last Name
 - ZIP+4
 - Congressional District
 - State Legislative District House Name
 - State Legislative District Senate Name
 3. Ensure that each row corresponds to the correct individual in your PCO database.
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6. ? Import Enriched Data Back into PCO

1. In PCO, go to the **People** tab, click the **gear icon (⚙)**, and select **Import/Export CSV**.
2. Choose **Start Import** and upload the enriched CSV file.
3. During the import process:
 - Match the new data columns to the custom fields you previously created.
 - Review the data mapping to ensure accuracy.
 - Preview the import to check for any errors or mismatches.
 - Finalize the import to update the profiles with the new information.

⚡ **Important:** PCO matches records during import based on `First Name` and `Last Name`. Ensure these fields are included and accurately maintained to prevent duplicate records.

? Additional Tips

- **Permissions:** Ensure you have the necessary permissions in PCO to export and import data.
- **Data Accuracy:** Double-check the address data for accuracy before uploading to Geocodio to ensure reliable results.

- **Custom Fields:** Only profile information can be imported into PCO. Ensure that the custom fields are correctly set up to receive the new data.
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By following these steps, you can efficiently enhance your congregation's address data with ZIP+4 codes and political district information using Geocodio.

Hack: Keeping Contact Info Up-to-Date in Planning Center

Keeping your church's contact information accurate is essential for smooth communication, event coordination, and pastoral care. Planning Center People (PCO) offers several tools to help your team gather and maintain reliable data, without the need for extra spreadsheets or manual tracking.

In this article, we'll walk through a few easy-to-implement systems that will help your church keep contact information fresh and complete throughout the year.

Registration Forms

What it does

Registration forms allow you to collect detailed contact information from individuals the first time they sign up for an event, class, or program.

Who it's for

Any adult engaging in your ministry through events, groups, or forms.

Best Practice

Ensure your forms request the following required fields:

- Full name
- Email address
- Phone number
- Residential address
- Birthdate (including year)

Responses from these forms can automatically update a person's profile, so no extra data entry is required.

Rolling Update Prompts

What it does

Triggers an automated email when someone participates (like checking in for worship) and is missing critical profile information.

Who it's for

People already active in your community, but missing key contact fields.

How it works

A prompt is triggered if:

- The individual checks in for a worship or program event
- They're missing two or more of these: phone, birthdate (with year), address, language, or photo
- They haven't been asked to update in 6+ months, or haven't submitted an update in 12+ months

Custom Field Tracking

This system uses two custom fields in PCO:

- **"Last Asked to Update Info"** — updated automatically when the email prompt list fires
- **"Last Info Update Received"** — updated automatically when the individual completes the form

These custom fields allow the system to track each person's contact history and ensure that reminders are respectful, spaced appropriately, and not redundant.

Failsafe

Your team can manually override or suppress prompts in individual cases when appropriate.

Annual Email Campaign

What it does

Sends a once-a-year check-in to everyone in your database to confirm or update their information.

Who it's for

All active participants and members in your Planning Center People database.

How to run it

- Use your email marketing tool (like Mailchimp or PCO's built-in email)
- Include the person's current info in the body of the email
- Ask them to confirm or correct using an embedded link to your update form
- Follow up with non-responders 1-2 weeks later

Why it works

Even with great systems, people move, change emails, or update their phone numbers. A yearly "spring cleaning" email helps you catch those updates in a single sweep.

Final Thoughts

When your contact information is up-to-date, everything works better—from pastoral check-ins to emergency notifications to mailers. Planning Center has the tools to make this process largely automatic. A few well-set triggers, custom fields, and annual check-ins can keep your database clean with minimal effort.

Let your data do its job—so you can focus on ministry.

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