< > Today

June ⌄

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	**4**	5	6	7
8	**9**	**10**	**11**	**12**	**13**	**14**
15	**16**	**17**	**18**	**19**	**20**	**21**

EVENT CALENDAR GUIDE

Kids Summer Camp

Youth Summer Camp

7 pm
Bible Study

ROCK

Welcome

The power of Rock's tools is the synergy they bring when they work together. This is certainly true in the area of event management. So as not to overwhelm though we'll start by describing each of the available tools as a stand-alone component. Once we have that complete, we'll dive into how you can use them together for mind-blowing results.

> **Enable SSL**
>
> Be sure to enable SSL on your website before taking registrations with payments.

Event Registration Overview

For many events it's good to know who will be coming. Rock's event registration features provide a simple tool to not only know who is planning to attend, but also to take care of many of the mundane tasks like event payments. The first thing that people want to know about event registration is the feature list. While not inclusive (you'll have to read further for that), below is a list of the major features contained in event registration:

- Free/Paid Registrations
- Partial Payments
- Additional Fees
- Single or Multiple Registrant Registrations
- Discounts (Percentage and Fixed Amounts)
- Payment Plans
- Notifications
- Custom Entry Forms
- Confirmation and Reminder Emails

Didn't see a feature you need? Keep reading...it's probably in here.

The Basics of Event Registration

Before getting too deep, let's establish some of the key terms and concepts related to event registration.

Registrar vs. Registrant

There are two parties involved with every registration that occurs. The registrar, the person who is actually entering the registration, and the registrant, the person who is registered for the event. In some cases, this could be the same person. For instance, Ted Decker may register himself for an upcoming event. Many times, though, this will not be the case. Ted Decker might register his two children for camp. In this latter case, Ted would be the *registrar* while his two children, Noah and Alexis, would be *registrants*. While we're often most interested in the *registrants* for an event, we also need to be able to store and report on the registrars.

Registration Templates vs. Registration Instances

As you use the event features, you'll find that many of your registrations are actually identical in terms of costs, fees and fields. To simplify the process of creating new registrations in these cases we've created the concept of a Registration Template. The template is where you'll configure the majority of the settings for a registration (things

like costs, required entry fields, fees, etc.). Once the template is complete, you can create *instances* of them that configure the settings that would be specific to the event (registration start and end dates, contact info, etc.). Still a little confused? Let's look at some examples.

It's likely that you'll create an event registration for events like a new members class. These classes happen often, but their event registration configurations will all be the same. You would create a registration template for this class, then create registration instances from this template with the proper dates and contacts.

On the other hand, an event like summer camp is probably different each year. In this case you may have a custom template with a single instance each year.

The Role of Groups

By this point you've probably seen how important groups are in Rock. Groups also play a role in event registration. In many cases the end point of the event registration process is the placement of the registrants into a group that you configure. While you're not required to have your event registrations add people to groups, in most cases you'll want to so you can enable things like event check-in.

You can also do other clever things with the relationship between registrations and groups. Since nothing is keeping you from having more than one registration linked to a single group, you can handle complex registration scenarios. Say that your summer camp can only take so many boys vs. girls. In Rock you could set up two different registrations with separate caps for boys and girls. Both of these registrations can also put their registrants into the same group, giving you a single list of all children attending camp. After the registration is complete, you can then add the registrants to one or more additional groups using the Group Placement features.

See our `Rock Your Groups` guide for more information.

> **URL Slug Required**
> The URL Slug **must be used** in order to have registrants be automatically placed into the correct group. We'll talk more about that below.

A Typical Event Registration

Hang in there - we're almost to the meat. First, we'll do a quick overview of what an event registration will look like to your members. The example below uses the default registration out of the box. While you'll see that this experience is simple and mobile-friendly, we plan to create even simpler experiences for very basic registrations (think: give me your name and we're done).

Let's get some background on the registration we're walking through below. In this case Ted Decker will be registering his two children Noah and Alexis, as well as Alexis' best friend Katie for camp. The camp costs $200 but also has an optional fee for a t-shirt.

Registration Walk-through

1 **Summer Camp**

Home / Calendar / Summer Camp

◯ Start
Registration

◯ Registrant
One

◯ Finalize
Registration

How many registrants will you be registering?

[−] 3 [+]

[Next]

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---

2 **Summer Camp**

Home / Calendar / Summer Camp

First Registrant

✓ Start
Registration

◯ Katie
Franks

◯ Registrant
Two

◯ Registrant
Three

◯ Finalize
Registration

Katie is in the same immediate family as *

◯ Ted Decker
● None of the above

First Name *

Katie

Last Name *

Franks

Birthday *

| Apr ⌄ | / | 4 ⌄ | / | 2016 ⌄ |

Gender *

Female   ⌄

Leader Preference *

Cindy

Cabin Preference *

With Alexis Decker

Additional Options

Camp Shirt

Large ($10.00)   ⌄

[Previous]   [Next]

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3 **Summary Camp**

Home / Calendar / Summer Camp

Second Registrant

| ✓ Start Registration | ✓ Katie Franks | ○ Alexis Decker | ○ Registrant Three | ○ Finalize Registration |

Alexis is in the same immediate family as *
- ○ Katie Franks
- ● Ted Decker
- ○ None of the above

First Name *

Alexis

Last Name *

Decker

Birthday *

| Feb ⌄ | / | 10 ⌄ | / | 2016 ⌄ |

Gender *

| Female   ⌄ |

Leader Preference *

Cindy Decker

Cabin Preference *

With Katie Franks

Additional Options
Camp Shirt

| Small ($10.00)   ⌄ |

[Previous]   [Next]

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Summer Camp

Third Registrant

Start Registration	Katie Franks	Alexis Decker	Noah Decker	Finalize Registration

Noah is in the same immediate family as *
- ○ Katie Franks
- ● Alexis Decker
- ○ None of the above

First Name *

Noah

Last Name *

Decker

Birthday *

Mar ⌄ / 10 ⌄ / 2013 ⌄

Gender *

Male ⌄

Leader Preference *

Ted Decker

Cabin Preference *

Any

Additional Options

Camp Shirt

Medium ($10.00) ⌄

[Previous] [Next]

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⑤

Summer Camp

Review Registration

Start Registration	Katie Franks	Alexis Decker	Noah Decker	Finalize Registration

This Registration Was Completed By

First Name *
Ted

Last Name *
Decker

Send Confirmation Emails To *
✉ ted@rocksolidchurchdemo.org

Ted is in the same immediate family as *
○ Katie Franks
● Alexis Decker

☑ Should Your Account Be Updated To Use This Email Address?

Payment Summary

Discount Code
[   ] [Apply]

Description	Amount
Katie Franks	**$ 200.00**
Camp Shirt - Large ($10.00)	$ 10.00
Alexis Decker	**$ 200.00**
Camp Shirt - Small ($10.00)	$ 10.00
Noah Decker	**$ 200.00**
Camp Shirt - Medium ($10.00)	$ 10.00
Total	**$630.00**

Total Cost
$630.00

Minimum Due Today
$0.00

Amount To Pay Today
$ 630.00

Amount Remaining After Payment
$0.00

[Set Up Payment Plan]

[Previous]   [Next]

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Rock Solid Church Demo   New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Ted ▾

⑥ Summer Camp

Home / Calendar / Summer Camp

✔ Start Registration → ✔ Katie Franks → ✔ Alexis Decker → ✔ Noah Decker → ○ Finalize Registration

Payment Information

Payment Amount: $630.00

Credit Card

▭ 1111222233334444

Previous   Pay

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Rock Solid Church Demo   New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Ted ▾

⑦ Summer Camp

Home / Calendar / Summer Camp

Congratulations Ted

You have successfully registered the following registrants for Summer Camp:

- **Katie Franks** - $200.00
  Additional Options:
  Camp Shirt - Large : $10.00
- **Alex Decker** - $200.00
  Additional Options:
  Camp Shirt - Small : $10.00
- **Noah Decker** - $200.00
  Additional Options:
  Camp Shirt - Medium : $10.00

Total Cost: $630.00
Paid $630.00 on 11/7/2024 (Acct #: , Ref #: T2024110709445742)
Balance Due: $0.00

A confirmation email has been sent to ted@rocksolidchurchdemo.org. If you have any questions please contact Jenny Michaels at jenny@rocksolidchurchdemo.com.

Make Payments Even Easier

☐ Save account information for future payments

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① Step one

Tell us how many people you plan on registering. Technically, you'll only see this screen if you've enabled `Allow Multiple Registrants` . Otherwise, you'll be limited to a single registrant. As you can see, Ted has selected three registrants.

② Registrant 1

And we're off! We'll start by entering the information required for the first child. In this case Ted has entered Katie's information. Because the

registration was configured to *Ask if registrants are in the same family*, that's exactly what it's doing. This will help make sure that the data that is entered into Rock is consistent with the actual family structure of the individuals being registered.

3. **Registrant 2**
Now we see the entry form for the next child. Let's pause here for a second and mention that while this case has one form for each registrant, Rock allows you to configure multiple entry screens for each registrant. OK, back to the registration. You'll see that Ted has entered Alexis' information and has indicated that Alexis is not in the same family as Katie.

4. **Registrant 3**
Now it's Noah's turn. Again, notice the family selection. Ted has selected that Noah is in the same family as Alexis.

5. **Summary**
Here we see a nice breakdown of the costs and fees. This is the last step before it's time to pay. There's also an opportunity to apply a Discount Code or set up a Payment Plan as well as enter the amount to pay today. You'll also note that the registrar can enter their information here too. Like the registrants, they can select which family they belong to.

6. **Payment**
Now it's time to pay up! Simply enter your card number to proceed.

7. **Confirmation**
Done! A summary of the costs and fees is shown, as well as confirmation that Ted paid in full and does not have a balance due. Lastly, Ted can choose to save his credit card information for future payments.

Controlling Saved Account Payment Options

Some payment gateways may not support certain payment methods like ACH or credit cards. To control which payment types are available during registration, go to the *Saved Registration Entry* block settings (Obsidian). Use the *Enable ACH* and *Enable Credit Card* options to allow or disallow those methods. To disable saved accounts as a whole, set *Enabled Saved Account* to "No".

Adding Family Members and Guests

Imagine this: a family signing up for a summer camp, adding their loved ones to the registration with just a few clicks. Rock's registration feature makes it easy to create a smooth, family-friendly experience that includes everyone in one go, whether they're family members or friends. With a couple of tweaks to your *Registration Template*, you'll have everything set up so people can effortlessly add everyone they need. (No one's left out here—not even that friend who's "basically family!") If you're new to Registration Templates, check out the chapter on that topic to get a sense of the bigger picture, and then come back here ready to rock your configuration.

When setting up your *Registration Template*, open the Details section. If you select "Yes" for *Registrants In Same Family* and enable *Show Family Members*, the registrar will see a new option called "New Family Member" in the *Family Member to Register* drop-down list. This means that anyone registering will see an easy way to add someone as a new member of their family.

Add New Family Member Configuration

If the person selects "New Family Member" as pictured below, Rock will add this new person to their family automatically, making them part of the same family unit in Rock.

Add New Family Member

Let's say you want registrars to add guests too, just like they add family members. Here's where things get fun. Go back to your *Registration Template*, set *Registrants In Same Family* to "Ask," and make sure *Show Family Members* is still enabled. This will give registrars a choice: they can confirm that someone is part of their family, or choose "None of the above" for those outside their family group.

Add Guest or Family Member Configuration

When *Registrant is in the same immediate family as* is set to the registrar, the drop-down will display existing family members, plus an option to add a "New Family Member." However, if *Registrant is in the same immediate family as* is set to "None of the above," a "Guest" option will be selected, perfect for bringing along friends, coworkers, or that favorite neighbor.

Selecting "Guest," as pictured below, means Rock will add a new person based on the registration details given. This way, you can track everyone accurately, making future interactions a breeze.

Add New Guest

With just a couple of clicks, registrars can include everyone they want—and with Rock's setup, you've made sure that process is as simple and friendly as possible. After all, the more the merrier!

Event Wizard

The process to create an event has a lot of moving parts, and it's essential to include all the right information in them. The Event Wizard is a tool designed with your staff in mind. This gives administrators an easy way to train the rest of the team on how to create events.

You might be thinking, "When would I ever need to use this tool?" Great question. The fact is you don't need this tool to create event registrations, but once you see its capabilities, you'll be asking, "Why would we ever create events any other way?"

Overview

Creating events involves much more than the event details. Events include but are not limited to, registrations, groups, calendar occurrences, and well… finances.

Let's jump right in and look at this tool, and all it has to offer.

Take the Step

Summer is coming, and that means camp is right around the corner. You've had camps in previous years, so the registration template is solid with everything a registration needs for this event to be successful. This year, you and the rest of the administrative staff have decided to pass the baton to staff members to create their registrations in Rock. This is a huge deal, pat yourself on the back for this great handoff.

But wait! The Students Director isn't the most tech savvy person to be creating registrations in Rock. Are you sure this is a good idea? Yes, it's still a good idea; in fact, it's the best idea you've had in a while. It takes five simple steps to create a typical registration, and some of these steps are even optional.

Administrators have no fear, check out the Event Wizard Block Properties section for details on customizing this tool for the whole staff. As for the rest of your staff, use the below steps for training purposes on using this tool.

Wizard in Use

Ted Decker has recently stepped into the temporary role of overseeing all students' and kids' events, and they are making plans for this year's summer camp. With all the details in hand, Ted is going to log into his Rock account and begin creating the registrations for camp.

He'll open the Event Wizard page (that you have so kindly configured for him) and he'll begin by choosing the registration template. Mentioned above, the registration

templates will already be created and ready for use. If for some reason someone needs a different template, you'll want to create that for them and make sure it's allowed on their Event Wizard block settings.

Follow along the step-by-step settings on the Event Wizard below.

Registration Template

1 Registration Template
A drop down with preconfigured registration templates. This will populate the Registration tab with the needed information for the type of event.

2 Campus
Choose a specific campus that the registration belongs to or choose "All". This option is only enabled if calendar events are enabled in the block settings.
If this option is enabled and a specific campus is selected (rather than "All"), it will also set the campus for the group created in step 3.

3 Contact
Use the person picker to choose the primary contact for the registration. This will be the logged in person automatically.

Registration Instance

1 **Registration Name**

This is the name that will be shown during the registration process. It's used to describe the event that you are registering for.

2 **Registration Starts**

The date the registration is open.

3 **Registration Ends**

The date the registration is closed.

4 **Send Reminder Date**

The date and time a reminder will be sent.

5 **Maximum Attendees**

The total number of people allowed to attend the event.

6 **Cost**

Registration Cost. This will only appear if the cost is not set on the template.

7 **Minimum Initial Payment**

The minimum amount a person must pay to register for the event. Leave this blank if the full amount is due at the time of registration. This will only appear if the cost is not set on the template.

8 **Account**

The account where the payments will be collected. This can be set by default in the template. It is a required field.

9 **Default Payment Amount**

Setting an amount here will default the payment amount for the person who is registering to the amount you choose. Often, you'll want the *Minimum Initial Payment* and *Default Payment Amount* to be the same. This will only appear if the cost is not set on the template.

10 **Public Name**

This section will autofill from the registration name. It can optionally be changed to something different from the registration name.

11 **Slug**

A slug is a standard web term that refers to a part of a web address that identifies a page or component of a page using human-readable keywords. In most cases the slug can be whatever you want but try to use only letters and numbers if possible because some special characters may cause issues with browsers. Dashes are okay to use in slugs if needed.

12 **Registration Customization**

Contains the Registration instructions, additional reminder details, and additional confirmation details. Review the Registration Instances chapter in this manual for more details.

Group

1 New Group
You can either create a new group, or use an existing group. In this image we're creating a new group.

2 Existing Group
Alternatively, you can use an existing group into which registrants will be placed.

3 New Group Name
Create your event group that the registration will place registrants into.

4 Parent Group
Choose a parent group for the new group to be under.

Event

1 **Event**
Dropdown to choose a preconfigured Event Item from the calendar list.

2 **New Event**
If the block setting allows for it, you can create a new event on this page.

Event Occurrence

1 **Location Description**
The description of where the event will be held.

2 **Schedule**
When will the event occur? Check out the Event Occurrences section for more details.

3 **Occurrence Notes**
This note will be shown on the calendar details screen on the public website.

The rest of this document provides more details for the steps above with some additional settings that can be set. However, this tool will get any event off the ground and ready for registrants.

Event Wizard Block Properties

Event Wizard Block Properties

1 **Name**

Block property name.

2 **Default Account**

Selects the financial account which will be pre-filled on page two if the cost is set on the instance.

3 **Default Calendar**

This calendar will be pre-selected by default if the staff person is permitted to create new calendar events.

4 **Available Registration Template**
The list of templates the staff person can pick from.

5 **Root Group**
The start of the group tree for the staff person to pick a parent group.

6 **Registration Instance Page**
Determines which page the "View Registration Instance" link in the final confirmation screen will take you to.

7 **Group Viewer Page**
Determines which page the "View Group" link in the final confirmation screen will take you to.

8 **Require Group**
Yes or No to require a group for created event registrations.

9 **Set Registration Instance Active**
If set to "No", the new registration instance will be created, but marked as inactive.

10 **Enable Calendar Events**
If calendar events are not enabled, registrations and groups will be created and linked, but not linked to any calendar event.

11 **Allow Creating New Calendar Events**
If set to "Yes" the staff person will be offered the "New Event" tab on page four and will be able to create both a new event and a new occurrence for that event.

12 **Require Calendar Event**
Select "Yes" or "No" to require the staff person to put this registration in an event.

13 **Include Inactive Calendar Items**
Show inactive calendar items to choose from in the list.

14 **Completion Workflow**
A workflow that will be launched when a new registration is created.

15 **Check-in Group Types**
Select group types which should enable check-in. If the selected registration template is one of these types, check-in options will be enabled for the group.

16 **Display Link to Event Details Page on Confirmation Screen**
Set this to "Yes" to show the link to the event details page in the wizard confirmation screen.

17 **External Event Details Page**
Determines which page the link in the final confirmation screen will take you to if the Display Link option (above) is enabled.

Registration Templates

As you've already read, templates contain a majority of the Event Registration's configuration. There's a lot to cover, so let's get started. To keep it simple, we'll break the screen down into bite-sized chunks. You can edit registrations under `Tools > Event Registration`.

General Settings

1 **Template Name**

The name of your template.

2 **Active**

When a template should not be used anymore you can deactivate it. You could also delete it, but that would also delete all the registrations that use it.

3 **Category**

To help organize registrations, you can organize and secure them by category.

4 **Description**

You can optionally provide a description for the template.

5 **Group Type / Group Member Role / Group Member Status**

These fields help tell Rock what settings to use when it drops the person into a group. In this case they will be placed into the group with the Role of *Member* and the Status of *Active*.

6 **Allow Multiple Registrants**

Fairly straight forward.

7 **Max Registrants Per Registration**

This indicates how many people you can register at one time. This only applies if *Allow Multiple Registrants* is enabled.

8 **Registrar Options**
This option allows the event coordinator to auto-complete the registrar's information with the first registrant's information as well as hide the registration form altogether. This is useful and streamlines the process when the person registering is also the registrar (say, for example when someone is registering themselves for an event). The options for this setting are:

- **Prompt for Registrar** - This default setting displays the standard registration form and process.
- **Prefill First Registrant** - This setting auto-completes the registration with the first registrant's information. This is helpful when the registrants don't log in to register for the event, but you still want to auto-complete their information.
- **Use First Registrant** - This setting also auto-completes the registration with the first registrant's information, but it also hides the registration panel during the *Review Registration* step of the process unless the form doesn't collect the registrant's email address. In this case, the registration panel will be displayed during the *Review Registration* step since that information is required for registration communications.
- **Use Logged In Person** - This setting will use the information of the person who is currently logged in to your website. Any information that is known about the registrar will be "locked" and unable to be edited, but any missing information (for instance, if their email address is blank on their record) will be able to be filled in during the *Review Registration* step, as above.

9 **Registrants In Same Family**
Creating the family structures during the registration process can be tricky. This setting allows you to give Rock hints about the people who are registering for the event. If you're hosting a pastors' conference, you'll probably want to enter *No* since the registrants are most likely not in the same family. Rock will then create new families for each registrant. *Yes* will assume that all the registrants are in the same family. *Ask* enables the cool functionality you saw during the walk-thru above. It provides a very elegant way for the registrar to tell you about the family make-up.

10 **Show Family Members**
Selecting *Yes* or *Ask* on the previous *Registrants in same Family* option, will enable this setting. Checking *Yes* here allows people who are logged in to select one of their existing family members for each registrant in a convenient drop down list -- a real time saver for family events. If you choose *Ask,* the family list will not be available until you indicate that the current registrant is in the same family as the currently logged in person.

11 **Show SMS Opt-in**
When enabled a checkbox will be shown next to each mobile phone number allowing the registrar to enable SMS messaging for this number.

12 **Connection Status**
If a new person record is created as part of the registration process, this is the Connection Status that will be assigned. Selecting a status here will override the Connection Status setting in the Registration Entry block's settings.

13 **Enable Wait List**

Checking this box will enable the wait list functionality. See the Wait Lists chapter below for more details.

14 **Notify**

When someone registers for an event, we often can't wait to find out. This setting allows you to notify several different parties.

1. **Registration Contact:** This is configured on the registration instance.
2. **Group Followers:** The groups that the registration is linked to can be followed by people with view permissions.
3. **Group Leaders:** All of the individuals that have roles that are marked *Is Leader* in the group linked to the registration will receive an email.

15 **Add Person Note**

When checked, registrars and registrants will have a note added to their timeline that denotes that they have registered for the event.

16 **Login Required**

Requiring the guest to log in ensures that a duplicate record is not created for the registrar, but it does come at the cost of requiring the guest to log in (and possibly register for a login) on your site.

17 **Set Cost On**

This setting determines where the cost will be set, on the template where all registration instances will share it, or on each individual instance.

18 **Financial Gateway**

The financial gateway you would like the financial transactions to be processed with.

19 **Enable Payment Plans**

If you want people to be able to pay for registration costs over time, you can enable this to allow the creation of Payment Plans. We discuss Payment Plans in the Payment Plans chapter.

20 **Batch Prefix**

Optional prefix to add to the financial batches. If left blank the prefix from the registration block will be used.

21 **Cost**

The cost of the registration.

22 **Minimum Initial Payment**

This is the minimum amount that must be paid at the time of registration. Leaving the field blank will have the effect of requiring full payment. A minimum initial payment amount is required to allow partial payments.

23 **Default Payment Amount**

This is an optional setting that lets you specify the amount to be filled in by "default" when registering for an event. The amount you configure here will be filled in automatically, but the registrar will have the option of changing the amount down to the Minimum Initial Payment, if they wish. Note: this only works if the Minimum Initial Payment is greater than zero.

24 **Registration Workflow**

This setting allows you to set a workflow to be run with each registration. A similar setting exists on the instance if you need a different workflow per

instance. Note that the workflow is only launched if the registration is done through the *Registration Entry* block on the external site. The Registration entity is passed to the workflow.

25 **Registrant Workflow**
Here you can specify a workflow to be launched for each registrant within a registration. Both the 'RegistrationRegistrantId' and the 'RegistrationId' will be passed to the workflow. Note that the workflow is only launched if the registration is done through the *Registration Entry* block on the external site.

26 **Required Signature Document**
Here you can set an electronic signature document to be signed for each registration. Currently all signature documents are "in-line" and will appear as their own step within the registration process. You'll want to use Rock's native Electronic Signature Document functionality, as well as the Obsidian version of the *Registration Entry* block, for this to work.

27 **Allow External Updates to Saved Registrations**
This setting keeps individuals from editing a registration once it has been saved. It's common that someone may come back to a registration to make a remaining payment. While there they can change any of the registrant information. Disabling the feature keeps these edits from occurring.

28 **Show Communication Settings**
Since the communications settings for a template are rarely changed, we've hidden them from everyday viewing. Select this checkbox to view these settings.

Minimum Due Today and Amount To Pay Today

The *Cost* and *Minimum Initial Payment* fields described in the prior section above have a direct impact on the *Minimum Due Today* and *Amount To Pay Today* fields seen during the payment stage of the event registration process. Let's take a quick look at how these fields work together.

Let's say that you configure your template (or instance) so that it has a total *Cost* of $200 and a *Minimum Initial Payment* of $100. When the person goes to register and pay, they are limited by these settings. The *Minimum Due Today* field, which comes from the *Minimum Initial Payment* setting, means exactly what it says. The person will not be able to pay any less than $100 (in our example) no matter what. However, the person can pay more than the minimum. The limit to how much they can pay is the total *Cost* of $200.

So, in our example, the person can pay any amount between $100 and $200. Whatever amount is chosen would go into the *Amount To Pay Today* field. If a person in this scenario pays $150 today then they will be making a partial payment and will need to provide the remaining $50 at a later time. They could split that $50 into two $25 payments by making another partial payment.

Electronic Signatures

Let's take a moment to point out a really powerful feature that we glossed over a bit. Rock can automate the process of requiring electronic signatures after each registration. We cover this topic in detail in the `Rock Admin Hero Guide`.

Forms

Now for the fun part - creating the entry form. When you see the power here, you'll have no choice but to smile.

Form Field List

Registrant Form(s)

Default

	Field	Source	Type	Internal	Common	Lock Existing Value	Use Current Value	Required	Show on Grid	Show on Wait List			
≡	First Name	Person Field				✓		✓	✓	✓		✎	
≡	Last Name	Person Field				✓		✓	✓	✓		✎	
≡	Birthdate	Person Field				✓		✓				✎	✕
≡	Gender	Person Field						✓				✎	✕
≡	Leader Preference	Registrant Attribute	Text		✓			✓			▼	✎	✕
≡	Cabin Preference	Registrant Attribute	Text		✓			✓			▼	✎	✕
≡	Team Color	Registrant Attribute	Single-Select					✓			▼	✎	✕
≡	Team Color	Registrant Attribute	Single-Select					✓			▼	✎	✕
													⊕

+ Add Form

At a minimum you must collect the registrant's first and last name. But in most cases, you'll want to add at least a couple more fields. When adding fields, you have your choice of where and how they're stored. Let's look at the options.

Form Field Editor

① Source

Your selection here drives what you ask on the form for this question, and how it's stored. There are four options:

1. **Person Field:** These fields come right off the person's record. They include things like:
   - Campus
   - Address
   - Email
   - Birthdate
   - Gender
   - Marital Status
   - Phone Numbers
   - Connection Status
2. **Person Attribute:** This type allows you to take what they've entered and place it into a person attribute.
3. **Group Member Attribute:** This allows you to store their entered values into a group member attribute of the linked group.
4. **Registrant Attribute:** The final type allows you to configure new attributes that will be stored with the registrant.

② Internal Field

This setting allows you to define the attribute but keeps it from being displayed on the external registration form. It will be made available however when editing the form internally. This is used for internal fields that will be entered after the registration takes place, or for simply displaying, for example, an existing person attribute on the grid for event-administration purposes.

③ Common Value

Filling out forms can be tedious. This setting allows you to take the entered value from the first registration and auto-populate the same field for the subsequent registrants. Note that *Common Value* is only available on the *Registration Entry block*.

④ Use Current Value

In an effort to reduce the amount of data that must be entered, this setting takes the current value from the registrar's record. This is especially helpful for attributes like 'Address'.

⑤ Required

This simply indicates whether the person must fill out this field before proceeding with the registration.

⑥ Show on Grid

This will place this attribute on the grid of registrants. It can be very helpful as long as you limit the number of items you put on the grid.

⑦ Lock Existing Value

If you enable this setting, the person's record will not be updated to reflect what they enter for this field. How this looks to the person registering can vary (see below).

⑧ Pre-HTML / Post-HTML

Like the workflow entry forms, these fields allow you to surround your entry fields with custom HTML markup. With some basic web design knowledge, you can use these fields to create richer experiences.

Lock Existing Value

As noted above, when adding a form field you can choose to *Lock Existing Value*. This simply means the person's existing record in Rock will not be changed to match what the person enters during the registration process for the given field.

Let's say you enable this feature on the Birthdate field, and Ted Decker is registering his son Noah for camp. Noah has a record in Rock already, with a birthdate of 3/10/2014. If Ted gives a birthdate of 3/11/2014 during the registration process, it will essentially be ignored and Noah's birthdate will remain locked at 3/10/2014.

Enabling *Lock Existing Value* on a form field will sometimes mean the field can be seen but not changed. In the example pictured below, this applies to the First Name, Last Name, and Birthday fields.

Locked Fields During Registration

In the image above it's important to note that Ted used the *Family Member to Register* drop-down, where he selected Noah Decker. This means Rock knows right away who the registration is for, so the fields with *Lock Existing Value* are not editable.

However, if the registration template is not configured to *Show Family Members* then Ted won't have that drop-down list to choose from. In that case, the *Lock Existing Value* fields will be editable so Ted can provide Noah's information manually. But just because they can be edited on the form doesn't mean the *Lock Existing Value* setting is ignored for these fields. When the registration is submitted and Noah's record is found, his existing data will still be unchanged. The same is true if *Show Family Members* is enabled, but Ted is registering someone outside of his family, as pictured below.

Editable Fields During Registration

Just remember that in the example pictured above, Katie's name and birthdate will not be changed if that information is already in Rock. Those fields can be edited during the registration process, but that's only to allow Ted to complete the form for people outside his family. The *Lock Existing Value* functionality remains in effect.

Conditional Registration Fields

In many cases unique information will apply to each registrant. Event registration form fields have conditions that control whether they are shown/hidden based on the registrar's selection of a prior form field value.

Gender Field

The conditional field options will be different based on the Gender selection.

Conditional Field From Gender Selection

First Name *
Noah

Last Name *
Decker

Birthday *
Mar ▼ / 10 ▼ / 2005 ▼

Gender *
Male ▼

Team Color Preference
Green ▼

Additional Options
Camp Shirt
Medium ($10.00 ▼

Previous   Next

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First, we'll have to add the form field on the event registration template. After creating the field, a filter icon-button will be shown on the forms grid.

Registrant Attribute

Registrant Form Field Id: 7156   ×

Source   Internal Field ⓘ   Common Value ⓘ   Lock Existing Value ⓘ
Registrant Attribute ☐ Yes   ☐ Yes   ☐ Yes

Name *   Active ⓘ
Team Color Preference   ☑

Abbreviated Name   Public ⓘ
Team Color   ☐

Description

Categories   Field Type
📁   ▼   Single-Select

Key *   Values ⓘ
TeamColorBoys   1^Blue,2^Green,3^Orange

Required   Show in Grid ⓘ
☑ Require a value   ☐ Yes

                                              Control Type ⓘ
Show on Bulk ⓘ   Drop Down List   ▼
☐ Yes
                                              Default Value
                                                                                ▼

Clicking on the ▼ icon on the *Form Field List* will display the criteria selection for that field.

Limitations on Conditional Fields

You may have noticed in the Forms section above that not every field in our example registration form has the ▼ icon next to it. That's because you can't apply conditions to every type of field on your form.

Only attribute fields that use a control which is text, list, checkbox, person picker, or date pickers can have criteria applied. In other words, if you don't see the ▼ icon then the field type you're using can't have conditional logic applied.

Add Criteria

Click *save.* Now you can see that the fields with conditional rules have a *highlighted filter button.*

Registration Attributes

While customizing the template for your event, you can add Registration Attributes directly from the same section. This would allow for the collection of attributes about the registration that do not pertain to a specific registrant. Use the ⊕ icon to open the attributes page.

Registration Attribute Editor

1 **Template Name**
The name of your template.

2 **Registration Attributes**
Attribute drop down, located on the main template section below the registrant forms.

3 **Add Attribute**
Clicking on the plus button opens the attribute window to configure attributes for this event template.

Below you can see the Registration Attribute window open. Here you will create the attribute for the event. In the *Categories* drop down, you can choose to show this attribute at the start or end of the registration. If a category is not selected, the attribute will display at the end of the registration.

Attribute Page

Attribute visibility is mainly controlled by security settings. The 'Public' checkbox pictured above acts as an override for situations where a person has rights to view an attribute, but we want to restrict visibility to attributes on public blocks. To hide a registration attribute, update the attribute's security to staff-only.

Great, now in this event template, every instance will have the same attributes on the registration.

To add a "hidden" or "staff-only" registration attribute to your template, create the desired attribute like normal and save the template. Then, edit the template and click the lock icon next to the attribute. Establish the appropriate permissions (i.e., only staff can view/edit) then save the template again. This will hide the attribute from the general public during registration, while allowing staff to view and edit it when managing registration details.

Confirmation Email

After completing the registration, you can set up a confirmation email. This email also acts as an emailed receipt. Remember that the below settings are only visible if you

enable *Show Communication Settings* at the bottom of the page under the 'Terms/Text' section.

Confirmation Email Settings

Confirmation Email ⌃

From Name

{{ RegistrationInstance.ContactPersonAlias.Pers

From Email

{{ RegistrationInstance.ContactEmail }}

Subject

{{ RegistrationInstance.Name }} Confirmation

Email Template

```
 1  {{ 'Global' | Attribute:'EmailHeader' }}
 2
 3
 4  <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Confirmation: {{
        RegistrationInstance.Name }}</h1>
 5
 6  {% assign registrants = Registration.Registrants | Where:'OnWaitList', false %}
 7  {% assign registrantCount = registrants | Size %}
 8  {% if registrantCount > 0 %}
 9      <p>
10          The following {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm |
               PluralizeForQuantity:registrantCount | Downcase }}
11          {% if registrantCount > 1 %}have{% else %}has{% endif %} been registered for {{
               RegistrationInstance.Name }}:
12      </p>
13
14      <ul>
15      {% for registrant in registrants %}
16          <li>
17
18              <strong>{{ registrant.PersonAlias.Person.FullName }}</strong>
```

While you're free to modify this email, we've provided a template that should work in most cases. Below we've shown what this sample email will look like. Note that the highlighted section comes from the *Additional Confirmation Details* field of the registration instance.

Default Confirmation Email

Reminder Email

We all appreciate reminders. Especially for events we may have registered for long ago. On this screen you can edit the reminder emails. When you create the registration instance (discussed next), you will configure when this email will be sent. Like the other communications, these settings are only visible if you enable *Show Communication Settings* at the bottom of the page under the 'Terms/Text' section.

Reminder Email Settings

Reminder Email

From Name

{{ RegistrationInstance.ContactPersonAlias.Pe

From Email

{{ RegistrationInstance.ContactEmail }}

Subject

{{ RegistrationInstance.Name }} Reminder

Email Template

```
1    {{ 'Global' | Attribute:'EmailHeader' }}
2
3    {% capture externalSite %}{{ 'Global' | Attribute:'PublicApplicationRoot' }}{% endcapture %}
4    {% assign registrantCount = Registration.Registrants | Size %}
5
6    <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Reminder</h1>
7
8    <p>
9        {{ RegistrationInstance.AdditionalReminderDetails }}
10   </p>
11
12   {% assign registrants = Registration.Registrants | Where:'OnWaitList', false %}
13   {% assign registrantCount = registrants | Size %}
14   {% if registrantCount > 0 %}
15       <p>
16           The following {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm |
                 PluralizeForQuantity:registrantCount | Downcase }}
17           {% if registrantCount > 1 %}have{% else %}has{% endif %} been registered for {{
                 RegistrationInstance.Name }}:
18       </p>
19
```

Again, we've provided you with a capable template. One thing to note here is that the template relies on the registration instance's *Additional Reminder Details* to set when the event will occur. We've highlighted this part in the email below.

Payment Reminder Email

Allowing partial payments is great, but getting the remaining balance has always been difficult. That was until Rock came around. With Rock you have several tools for getting the remaining balance quickly and easily. The configuration items in this section help set up the communication tools for these reminders. For the most part you can leave them as is. You can read more about these tools in the Payment Reminders section below. Remember that the below settings are only visible if you enable *Show Communication Settings* at the bottom of the page under the 'Terms/Text' section.

Payment Reminder Email Settings

Payment Reminder Email ⌃

From Name

{{ RegistrationInstance.ContactPersonAlias.Pers

From Email

{{ RegistrationInstance.ContactEmail }}

Subject

{{ RegistrationInstance.Name }} Payment Reminder

Email Template

```
1   {{ 'Global' | Attribute:'EmailHeader' }}
2
3   {% capture externalSite %}{{ 'Global' | Attribute:'PublicApplicationRoot' }}{% endcapture %}
4
5   <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Payment Reminder</h1>
6
7   <p>
8       This {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm | Downcase }} for {{
            RegistrationInstance.Name }} has a remaining balance
9       of {{ Registration.BalanceDue | FormatAsCurrency }}. The
10      {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | Downcase | Pluralize }} for this
11      {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} are below.
12  </p>
13
14  {% assign registrants = Registration.Registrants | Where:'OnWaitList', false %}
15  {% assign registrantCount = registrants | Size %}
16  {% if registrantCount > 0 %}
17      <ul>
18      {% for registrant in registrants %}
19          <li>{{ registrant.PersonAlias.Person.FullName }}</li>
20      {% endfor %}
```

Payment Reminder Time Span ⓘ

14

Terms / Text

Event registrations can be used for several different kinds of events. To help fit different types of events, we allow you to customize many of the terms used during the registration process. In this section you can also configure the *success* text that displays on the final page of the registration screen.

Terms and Text Settings

Terms/Text ⌃

Registration Term

Registration

Fee Term

Additional Options

Registrant Term

Registrant

Discount Code Term

Discount Code

Registration Attribute Title - Start ⓘ

Registration Information

Registration Attribute Title - End ⓘ

Registration Information

Success Title ⓘ

Congratulations {{ Registration.FirstName }}

Registration Instructions ⓘ

`</>` **B** *I* S̶ 🔗 **A** ▾ ⚡▾ ☰ ☰ 🗎 ☰▾ 🖼 🗎 📂 📋 🅦 ↩ ↪

Registration Confirmation Text ⓘ

```
 1  {% assign registrants = Registration.Registrants | Where:'OnWaitList', false %}
 2  {% assign registrantCount = registrants | Size %}
 3  {% if registrantCount > 0 %}
 4      <p>
 5          You have successfully registered the following
 6          {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | PluralizeForQuantity
              :registrantCount | Downcase }}
 7          for {{ RegistrationInstance.Name }}:
 8      </p>
 9
10      <ul>
11      {% for registrant in registrants %}
12          <li>
13
14              <strong>{{ registrant.PersonAlias.Person.FullName }}</strong>
15
16              {% if registrant.Cost > 0 %}
17                  - {{ registrant.Cost | FormatAsCurrency }}
18              {% endif %}
19
20              {% assign feeCount = registrant.Fees | Size %}
```

Registration Instances

Now that we understand how to make registration templates, we're ready to implement them for specific events. There are several places where you can create registration instances. Since we're already familiar with the registration template screen, let's first create a new instance here.

Instance Settings

Clicking the ⊕ from the instance grid will bring up the instance editor shown below.

Registration Instance Settings

Registration Messages

10 Registration Instructions ⓘ

11 Additional Reminder Details ⓘ

Camp starts on January 16. We will be leaving from the church at 7am so please don't be late.

Be sure to read our What To Bring To Camp guide for details on packing for camp.

12 Additional Confirmation Details ⓘ

Looking forward to seeing you at camp this year!

Registration Session

13 Timeout Length ⓘ   14 Timeout Threshold ⓘ

[minutes]   [registrants]

Save   Cancel

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① Registration Instance Name
This is actually an important field that will be shown during the registration process. It will be used to describe the event that you are registering for (e.g., *Thank You for Registering for "_____"*).

② Active
This determines if the registration instance is currently active.

③ Registration Starts
The date and time that the registration starts.

④ Registration Ends
The date and time that the registration ends.

⑤ Maximum Attendees
Indicate the total number of people that can register for the event.

⑥ Registration Workflow
You can optionally configure a workflow to run at the end of each registration. The registration will be passed in as the entity on the workflow. A similar setting exists on the template if you would like to ensure that all instances have the same workflow.

7 **Send Reminder Date**

The date and time that the reminder should be sent.

8 **Registration Contact Information**

The information that should be displayed as the contact for the registration process.

9 **Account**

The financial account that the registration costs/fees should be tied to.

10 **Registration Instructions**

These instructions will be shown to the person when they start the registration process. Remember, the template has Registration Instructions also. If you have Registration Instructions in both places, the person will only see the instructions from here at the instance level, not the instructions from the template.

11 **Additional Reminder Details**

This text is used in the reminder email template defined on the registration template. It's important that you include information on when and where the event will occur. For more information on the reminder email, see the template section above.

12 **Additional Confirmation Details**

Like the reminder details, this field is used to provide additional, instance-specific, information to the email template stored on the registration template.

13 **Timeout Length**

You'll typically only need this if there are limited spots available in your registration instance. Setting a timeout length ensures spots aren't being held up by someone who has stopped or walked away from the registration session. When setting a Timeout Length, be sure to remember to give registrars enough time to complete forms, particularly if they're lengthy. See the Timeout Settings section below for additional details.

14 **Timeout Threshold**

Timeout Threshold is intended for use with limited capacity events, in order to prevent an oversold event. This setting determines the minimum number of available slots that must be reached before the registration session functionality (like *Timeout Length*) becomes activated.

Setting the Price on the Registration Instance

As we discussed in the chapter on Registration Templates, you can optionally set the cost of an event on the Registration Instance. When configured, the price options will be shown on the screen above.

Clone Registration Instance

To create a registration instance you can use the process above, or you can use an alternative method described in the Bringing It All Together chapter. There is also a

third way to create registration instances, which is to clone them from an existing instance. When viewing an instance, click the ☐ button to create a clone of that instance. Many of the settings will be copied from the original instance into the clone, such as Maximum Attendees, Registration Start/End Dates, Contact Information, and more.

Clone Registration Instance

Timeout Settings

By default, the registration process will ensure that events don't oversell. The default behavior of the registration process is to check the number of registrants desired against the number of spots available at the start of the process. This can lead to situations where if multiple people are registering at once someone could be left without a spot after completing the registration. If there is a waitlist, they would be placed on it, but they would not know that there wasn't room until the very end.

To provide a better experience for these surge scenarios Rock has added the concept of registration sessions. When enabled, the registration process will hold registration spots for an individual while they are in the process of completing the registration. This ensures that a person has room before they start the process of registering.

When enabled, a session countdown timer will be shown on the registration page. The

countdown timer resets after each page of the registration. If a registration expires the person is notified that the session has expired and is given a chance to request an extension. If there is still room for their registrants, the extension will be granted, and they can continue on where they left off. If only a portion of their registrants have slots, a message will be displayed allowing them to determine how to proceed.

Obsidian Registration Entry Block

It's important to note that the *Timeout Length* and *Timeout Threshold* settings only apply if you're using the Obsidian version of the Registration Entry block (Obsidian > Event — Registration Entry). Aside from supporting timeout features, this block is also compatible with the new (as of this update) Pushpay plugin. Keep in mind that the Obsidian Registration Entry block does not work with Internet Explorer.

Also, not every kind of attribute field is compatible with Obsidian yet. We're working hard on this too but most of the common ones have been working since this block was released.

Follow A Registration Instance

After saving a registration instance you can choose to follow it by selecting the ☆ icon in the upper right corner of the details block. This will add it to the list of followed instances on your dashboard.

Now that we've shown you how to make a new registration instance from this page, we should tell you that you'll rarely ever create an instance from here. More about that later in the chapter Bringing It All Together.

Registration Fees

We get it - events are tricky and often come with odd requirements for additional fees. We've tried to think of as many combinations as possible when creating the features here, so we have a lot to cover.

Fee Types

Below is a chart of the various types of fees that are available. You can use any combination of these to create the fee structure you need for each registration event.

Types of Fees

1 Single Option

T-Shirt ($10.00)

☐

2 Single Option with Quantity

T-shirt ($10.00)

| 0 | + | − |

3 Multiple Options

T-Shirt

| ▼ |

S ($10.00)
M ($15.00)
L ($20.00)

4 Multiple Options with Quantity

T-shirt

S ($10.00)

| 0 | + | − |

M ($15.00)

| 0 | + | − |

L ($20.00)

| 0 | + | − |

1 **Single Option Fee**
You either want it or you don't.

2 **Single Option Fee with Quantity**
You can get as many as you want.

3 **Multiple Options**
Variety is the spice of life.

4 **Multiple Options with Quantity**
What's better than a little spice? A whole lot!

Now that we see what's possible, let's look at how to set up fees.

Setting Up Fees

You can add, edit and delete fees in the *Fees* section of the Registration Template.

Fee List

Fees   ^

	Fee	Options	Cost	Enable Quantity	Discount Applies	Is Active	Is Required		
≡	Camp Shirt	Multiple	Small- $10.00, Medium- $10.00, Large- $10.00, X-Large- $10.00			✓		✏	✕

⊕

Click the ⊕ button to create a new fee.

Fee Editor

Fee   ✕

Name * ①
[   ]

Options ②   Enable Quantity ⓘ ③   Is Required ⓘ
○ Single ○ Multiple   ☐ Yes   ☐ Yes

Cost   Discount Applies ⓘ   Hide When None Remaining ⓘ ⑦
$ 0.00   ☐ Yes ④   ☐ Yes

Maximum Available ⓘ ⑥ Is Active ⓘ
[   ]   ☑ Yes ⑤

                                                          Save   Cancel

① Name
This will be used for the label that goes above the fee selection.

② Options
Here is where you'll make the determination of whether the fee has
multiple options. When selected, it will display a key/value input that
allows you to enter optional text as well as the cost.

③ Enable Quantity
Pretty obvious what this does (enables the quantity picker).

④ Discount Applies
Sometimes you'll want the discount calculation to apply to fees,
sometimes not.

⑤ Is Active
Check this box to make the fee active. Inactive fees will not be displayed for
new registrations but will be displayed when viewing charges for existing
registrations.

⑥ Maximum Available
If a max available quantity is not specified, it is an unlimited item. Adding a
number to this field will show the remaining available items when
registering. Keep in mind this number applies to registration instances,
not individual registrations. For example, if the fee is being used for
summer camp t-shirts, and if you have a single registration instance, then
you would enter the total number of t-shirts you have in stock.

⑦ Hide When None Remaining
You can enable this setting to hide fee items from view if you've selected
Enable Quantity and there are zero remaining items. If this is unchecked,
then items with zero remaining will still show but can't be selected by the
person registering.

Optional vs. Required Fees

Fees can be either optional or required. To designate a fee as required select the *Is*

Required checkbox on the *Fee Editor* screen. Required fees are designated by a red dot on the event registration screens. If a registration is submitted with a missing required fee value, Rock will display a message asking the registrar to select a value before proceeding.

Here's a closer look at how Rock handles each of the fee types above when they are designated as required:

- **Single Option** - Rock automatically checks the box and disables it to prevent changes.
- **Single Option with Quantity** - Rock sets the minimum quantity to "1" and prevents it from being changed to less.
- **Multiple Options** - Rock creates the same dropdown list as an optional fee but displays a message if no value is selected.
- **Multiple Options with Quantity** - Because at least one option must have a value selected, Rock displays a warning if all options have a value of "0".

Keeping the *Is Required* checkbox on the *Fee Editor* screen unchecked creates *Additional Options* in the registration.

Optional Fees Options

Fee ✕

Name *

Camp Shirt

Options
○ Single ● Multiple

Costs ⓘ

Small	$ 10.00	99	✕
Medium	$ 10.00	0	✕
Large	$ 10.00	70	✕
X-Large	$ 10.00	Max Available	✕

➕

Enable Quantity ⓘ
☐ Yes

Discount Applies ⓘ
☐ Yes

Is Active ⓘ
☑ Yes

Is Required ⓘ
☐ Yes

Save   Cancel

Registering with Optional Fees

First Name *

Last Name *

Birthday *
[▾] / [▾] / [▾]

Gender *
[▾]

Leader Preference *

Cabin Preference *

Additional Options

Camp Shirt
[▾]

Previous   Next

Fee Reports

All of the fees for each registration are listed under the *Fees* tab on the *Registration Instance* screen. You can use the filter options to filter the information by date range, fee name, and/or one or more of the options that apply to that fee. (Note: because the options vary with each fee, the available filter options are only displayed once a particular fee name is selected.)

Viewing Fees

To further help you track and work with fees, you also have the option of exporting fees to an Excel spreadsheet. To do this, click the 🔲 button on the *Fees* tab on the *Registration Instance* screen.

Discounts

People often ask, "Do you have quantity or early bird discounts?" Well, Rock has something better. Rock's discount feature gives you a ton of flexibility to create discounts customized for your organization's needs. Want to provide a discount code? You can do that. Want to offer a discount for families registering more than three children? You can do that, too. How about a unique combination of both of these only for a limited time *and* you want the discount to be automatically applied? Yep, Rock's got you covered. Let's take a closer look at these options and how they work.

Discounts are listed in the *Discounts* section of the Registration Template. Here you can add, edit and delete discounts.

Discount List

Click the ⊕ button to create a new discount.

Discount Editor

All of the discount options are available in the *Discount Code* screen. From here you can create whatever combination of criteria you want for each discount.

> ### One Discount Per Registration Instance
>
> Keep in mind that only one discount can be applied to each registration instance. If multiple discounts are set up to automatically apply, and if the registration qualifies for all of them, then the first discount listed in the template will be applied. When a discount is automatically applied, it can be manually replaced with a single other code.

OK, let's take a closer look at each of the discount options.

Discount Codes

Discount codes allow you to give individuals a code to reduce the amount of their registration. This discount can be in the form of a percentage of costs/fees or a fixed amount. To create a discount code, enter a percentage or amount in the *Discount Type* and *Discount Percentage* fields of the *Discount Code* screen. Individuals can then apply the discount code at the time of registration, or after registering if they haven't yet paid in full (see Post-Registration Discount Codes).

Quantity Discounts

Quantity discounts allow you to create a discount for multiple registrations in the same transaction, such as a group registration. To create this type of discount, enter the minimum and maximum number of registrants in the *Discount Code* screen. When Rock processes the registration, if the number of registrants entered falls within the parameters entered, the discount is applied.

> ### Maximum Registrants
>
> The number of Maximum Registrants reflects how many people within the registration can have the discount applied. If you have three registrants being signed up, and if Maximum Registrants is set to '1', then the discount will only apply to one of the three registrants. If you want to have a group or family pay only the price of a single person, set the Maximum Registrants to be one less than Minimum Registrants, and make sure the discount covers all the costs and fees of only a single person.

Early Bird Discounts

Early bird discounts apply a discount for registrations that fall within a certain date range. That date range is entered in the *Effective Dates* fields of the *Discount Code* screen. When Rock processes the registration, if the date of registration falls within the entered timeframe, the discount is applied.

Customized Discounts

You can create your own, unique discount by combining any of these discount types. Just know that when the registration is processed, all of the criteria you enter has to be met for the discount to be applied. So, that super complicated option we mentioned above? Maybe not the best practice.

Automatic Discounts

The *Discount Code* screen includes an option to automatically apply the discount. If this option is selected, Rock will automatically check the registrations against the discount codes available and apply the first discount that matches the criteria. The order the codes are listed in the Registration Template is the order in which Rock applies them. A registrant can override any automatic discount with a discount code entered manually during the registration process.

Maximum Usage

You can limit the number of times a discount code can be used by entering a value in the *Maximum Usage* field. For example, you might use this to grant a discount to the first 100 people who register. Leave this field blank if you want the discount code to be available for use indefinitely.

Viewing and Reporting Used Discounts

Once discounts for a particular registration event are used, they're recorded under the *Discounts* tab in the *Registration Instance* screen. You can filter these records by:

- **Discount Date Range** - Displays all of the discount codes used during the dates specified.
- **Discount Code** - Displays the discounts matching the code selected from the dropdown menu.
- **Code Search** - Displays all discount codes that match the search criteria, whether it be a word, partial word or number. For example, if you search for "ly", Rock will display any codes with names that contain "ly". If you create discount codes with specific prefixes, such as numbers or abbreviations, the search function can help you quickly locate all of the codes matching a particular prefix. Note: If you select a discount code from the dropdown menu, the discount code search option will be disabled.

The amounts displayed in the *Total Results* section of the screen are based on the discount codes displayed. If you filter the discounts, the totals will be recalculated and updated based on the filter parameters.

Payment Plans

Payment Plans let you spread out your payments over time, making it easier to afford activities like camps or other events. With options to customize how often payments are made, Payment Plans offer flexibility and peace of mind, ensuring everyone can participate in your events.

> **Obsidian Block**
>
> The Payment Plan feature is available only when using the Obsidian version of the Registration Entry block.

Starting a Payment Plan

Registering for an event with a Payment Plan is simple. The registration process stays the same as it is without Payment Plans. There's only a slight change during the final step, where you'll have the option to create a Payment Plan.

When you reach the payment step, you can either pay in full or set up a Payment Plan by clicking the *Set Up Payment Plan* button. From there, you'll be asked to choose:

1. **Payment Frequency:** How often you want to make payments (weekly, monthly, etc.)
2. **Start Date:** When you'd like your payments to begin.

Set Up Payment Plan

Once you've made your selections, you'll move to the next screen where you can customize your Payment Plan further.

Set Up Payment Plan

1 Total and Due Date
The total amount you owe and when it needs to be fully paid.

2 Payment Frequency
Choose how often you'd like to make payments (the available options may vary depending on your payment gateway).

3 Start Date
This affects how many payments you'll make before the due date. A later start date usually means fewer payments.

4 Amount To Pay Today
You can choose to pay part of the cost upfront, and the rest will be spread out over the remaining payments.

5 Number of Payments
This is based on the frequency and the time left until the deadline. For example, if you're making weekly payments and the deadline is two months away, you can make up to eight payments.

6 Payment Schedule
A summary of your payment plan, showing how much each payment will be, how many payments there will be, and how often they'll happen.

Please note that Payment Plans can only be created during the registration process. Your staff or volunteers won't be able to set one up on behalf of someone else. While administrators can modify payment plans, they can't create them.

Once your plan is set, you can manage it by going to the Recent Registrations section

from your *My Account* page. You'll have the option to cancel your Payment Plan if needed.

Change or Cancel a Plan

If you want to make changes to your Payment Plan, you'll need to cancel the current plan and set up a new one. Again, you can do this on your *My Account* page under Recent Registrations.

If a new fee is added after you've set up your Payment Plan (like an additional t-shirt), the plan won't automatically adjust to cover the new amount. The additional fee will need to be paid separately.

Configuring Payment Plans

Now that you've seen how a Payment Plan works, let's talk about how to configure it. Payment Plans are enabled in the registration template settings (under `Tools > Event Registration`).

Enable Payment Plans

① **Enable Payment Plans**
To enable Payment Plans, simply check the box labeled *Enable Payment Plans* in the template settings. This will unlock more options. Check with your gateway provider to ensure their service is compatible with Payment Plans.

② **Selectable Payment Frequencies**
Choose which payment frequencies (weekly, monthly, etc.) are available for people to use when creating their plans. If you select none, all options will be available. If you select all, new options added later won't be automatically available.

Next, set a *Payment Deadline* for the registration. This is the date by which all payments must be completed. The number of payments available will depend on the frequency selected and the time remaining before this deadline.

Set Payment Deadline

Payment Plan Administration

Payment Plan management happens in the same screens used for managing event registrations, with added features. If a Payment Plan is in place, you'll see a calendar icon next to the *Balance Due* on the Registrations tab.

Payment Plan In Event Registration

Payment Plan Changes Won't Auto-Sync

If you're using the Payment Plan feature, be aware that changes to a registration's balance (like applying discount codes) won't update the registrant's payment plan. Payment schedules are controlled by the external payment gateway (e.g., My Well), not by Rock. To adjust an individual's payment schedule, you'll need to do the following...

Administrators can make changes to existing Payment Plans by accessing the registration details.

Deleting a plan will cancel the plan and any remaining payments will not be made. If the person wants to continue to use a Payment Plan after it's been deleted, they must create a new plan. Note that the *Change* and *Delete* options pictured below are only available if the block's security is updated to allow *Edit Payment Plan* access.

Payment Plan In Event Registration

The *Number of Payments* field, pictured below, differs for administrators. While registrars can only select a certain number of payments based on frequency, start date and payment deadline, administrators can choose any number. This allows extending the Payment Plan beyond the deadline, which can help if someone is worried about making the current payments.

Administrative Change to Plan

Please note that changes cannot be made on the date a payment is due. Also, if additional fees are added, the Payment Plan won't automatically update to reflect the new total, so the person will need to pay the fee separately. However, administrators can adjust the Payment Plan manually to reflect the updated balance.

Managing Event Registrations

Now that you're comfortable creating event registrations, let's see how to manage them through the registration lifecycle.

Promoting Your Registration

The easiest way to give your guests access to an event registration is through a calendar event. The Bringing It All Together chapter below covers the process of linking calendar events to registrations. Once linked, the event detail will display the `Register` button as shown below.

Event Detail Page With Registration Link

You can also link directly to an event registration using a URL. The formats for doing so are:

- http://www.yourexternalsite.com/page/999?RegistrationInstanceId=999 (where the page id and registration instance id match the appropriate values)
- http://www.yourexternalsite.com/Registration/<slugname> (you can find more on *slugs* in the Bringing It All Together chapter below)

Managing Registrations

You can manage the registrations by going to the *Event Instance Detail Page:*

`Tools > Event Registration > Registration Detail > Registration Instance` .

At the top of this page, you'll see the details of the registration with an `Edit` button to modify its settings. You'll also notice a number of tabs toward the bottom of the page, each relating to a different component of the registration process (registrations, payments, etc.). The content on each of the tabs can be filtered using the *Filter Options* link.

Registrations Tab

The *Registrations Tab* shows all of the registrations that have been entered into the system. Remember these are registrations that could have multiple registrants. If any of the registrations are tied to a campus (e.g., because there is a Campus *linkage* configured, see below) then a campus column will also appear.

Registration Instance Detail Page

From this tab you can view and edit an existing registration or manually add a registration yourself (great if you also allow paper registrations).

Registration Edit Screen

1 Registration Details
This shows the details of the registration including information on the Registrar. You can easily resend the confirmation email from here.

2 Registrant Details
Next you will see a panel for each registrant on the registration. You can also edit their registration details from this screen.

3 **Financial Information**

These tabs allow you to view and edit account, fee and payment information. We'll discuss this further below.

4 **Audit Log**

This button allows you to view information about how the registration was entered and any financial changes that were made.

5 **Move Registration**

Sometimes a registration needs to be moved. Perhaps the person registered for the wrong instance of the event, or maybe they just changed their mind. Don't worry, moving a registration is easy! However, you can only move the registration to an instance that uses the same registration template (moving them across different templates would be rather difficult as there would be different fields, costs, fees and discounts.) This button allows you to complete the move of the registration.

6 **Add New Registrant**

Notice that at the bottom of the screen you can add more registrants to the registration if needed.

Registrants Tab

The next tab shows a listing of all registrants for the event, including summary information about groups, fees and placements. This list is also filterable. Clicking a row will show you the registrant's details as well as the rest of the related registration information. If that screen seems familiar, it's because it's the same screen as the one above except that we scroll down to the selected registrant's information.

Registration Instance Registrants

You may notice a ☐ icon at the top and bottom of the list of registrants, in addition to the other grid actions. Clicking this will start a new communication, sent to the registrar of any selected registrants. This allows you to filter the list of registrants and then easily contact the associated registrars.

Payments Tab

The payments tab allows you to view all the payments that have been made for registrations for this instance. Clicking on one of the rows in the list opens a financial transaction for that payment. From this transaction detail screen, you can process a refund for the payment.

Registration Payments

Fees Tab

This tab displays all of the registration fees associated with the event. The information can be filtered and exported to a spreadsheet. Be sure to read the Registration Fees chapter to learn how fees work with event registration.

Registration Instance Fees

Discounts Tab

This tab displays all of the discounts that have been used, as well as a lot of useful information about the discounts. You can view which codes were used, who used them, how many times each discount was used, and the total costs of the discounts. As with the other tabs, the information provided in this tab is filterable and can be exported to a spreadsheet.

Registration Instance Discounts

Linkages Tab

This tab will make more sense once you read the Bringing It All Together section. Basically, it shows all the related calendar events and groups that are linked to this registration. You can also include a Campus linkage, which will associate registrations with that campus. The *Calendar Item* campus ("All Campuses" in this example) comes from the calendar item event occurrence's campus.

Registration Instance Linkages

If you don't have a Campus linkage set up, you can pass a `CampusId` parameter in the URL during registration and the registration will instead be associated with that campus. If you do have a Campus linkage set up, the registration will be associated with the linkage campus regardless of URL parameters used during the registration.

Wait List Tab

This tab displays registrants on the wait list and allows you to move them off of the wait list. To learn more about wait lists, see the Wait Lists chapter below.

Registration Instance Waitlist

Group Placement Tabs

If you've set up *Placement Configuration* in your registration template, you'll also see one or more tabs related to those placements. This is where you can sort registrants into groups. See the Registration Group Placements chapter to learn more.

Registration Group Placement

Wait Lists

We know your events are going to be popular. So popular, in fact, that you probably won't be able to fit everyone. Don't worry, Rock's wait list features will ensure that you can manage the crowds. Let's take a look at how these features work.

Registration Entry

You can enable the wait list features on registration templates. Then, you'll configure the maximum number of registrants on registration instances. When the event is full, individuals will see the message below when they attempt to register.

Wait List Warning

At this point, the individual can decide not to register or to add themselves to the waitlist. Let's look at a slightly more complex scenario. What if there is only one spot left and the person is hoping to register two individuals? When they arrive at the page, they'll see a normal registration page. But, when they select more people than there are slots available, they'll get the message below.

In this case, let's assume that they would like to continue with registering both kids for camp. You'll notice that the registrant entry screen below looks fairly normal but has an additional notice at the top reminding them that this individual will be fully registered for the event.

Registrant Screen

As they move to register the second child, they will notice that the reminder is now warning them that this individual will be on the wait list. Careful observers may have noticed that the number of entry fields has changed. (We're not asking for Leader Preference, etc.) You have the option to configure registration form fields for the wait list or to hide them.

Group Member Entry Fields

Since individuals on a wait list are not added to configured groups, entry fields that are stored as group member attributes cannot be shown.

Wait List Screen

As they move to the payment screen, note that those on the wait list are not charged for the registration. They are simply holding a spot.

Wait List Payment

It's very important that we're clear about who is on a wait list and who is a full registrant. To this end, both the confirmation screen and the email reflect the individual's registration status.

Wait List Confirmation Screen

Rock Solid Church Demo   New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Alisha ▾

Summer Camp

Home / Calendar / Summer Camp

Congratulations Alisha

You have successfully registered the following registrant for Summer Camp:

- **Jen Fish** - $200.00

You have successfully added the following registrant to the waiting list for Summer Camp:

- **Lynn Sykes**

Total Cost: $200.00
Paid $200.00 on 2/14/2022 (Acct #: ************4444, Ref #: T20220214164533507)
Balance Due: $0.00

A confirmation email has been sent to alisha@rocksolidchurchdemo.com. If you have any questions please contact Jenny Michaels at jenny@rocksolidchurchdemo.com.

Make Payments Even Easier

☐ Save account information for future transactions

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Wait List Administration

Now that we're familiar with the process of registering for a wait list, let's look at how you can administer wait lists.

From the registration instance screen, you'll notice that registrations with individuals on a wait list are clearly noted on the list. There is also a *Wait List* tab to help you view and manage the wait list.

Registration List

The Wait List tab allows you to view those on the wait list with their placement order. If you would like to move an individual from the wait list to a full registrant, simply select the checkbox in front of their name and select the *Move From Wait List* button at the bottom of the grid.

Wait List Tab

After you select to move them, you'll see the screen below confirming that they have been moved. At this point the new full registrant will be added to any groups that were configured.

Wait List Move Confirmation

If you'd like to send them an email to confirm the move and request additional fields simply select the *Send email to individuals* checkbox.

The email that is sent should remind them if any payment is due and also ask them to complete the registration if any additional fields are needed. This email might be crafted already in the Registration Template, but if not, you can click the *Source* toggle to create it here. Don't forget you can use Lava to personalize the content.

Wait List Move Email

While this feature makes moving people from the wait list a simple process, you can also convert a full registrant to a wait list member or a wait list member to a full registrant from the registration details screen.

Registration Payment Reminders

Allowing partial payments is great, but getting the remaining balance has always been difficult. That was until Rock came around. Now there are several tools for getting the remaining balance quickly and easily. Let's look at all your options!

Manual Reminders

One way to remind individuals of remaining balances is to manually send them a reminder. You can do this from the *Registration Instance* page.

Send Payment Reminders

Once you click the `Send Payment Reminders` link, you'll see the page below. This page

allows you to customize the reminder text and who should receive the email.

Payment Reminder Communication

1. **From Name**
   The From Name, From Email and Subject should be filled in for you based on the values supplied from the registration template. You can edit these values to suit your needs.

2. **Message**
   Next you see a preview of the email the individuals will receive. The preview uses the information for the first person on the grid below to give you a precise view of what the person will receive in their inbox.

3. **Template Toggle**

You can choose to edit the email template if you wish by clicking the `Source` toggle. This will display the Lava template that creates this email.

4 **People**

Below the preview you'll see a list of those with a remaining balance. When creating the list, Rock looks at the *Payment Reminder Time Span* setting for the registration template. If the registration has already received a reminder or was created within this timespan, the registration is greyed out and is not selected (the checkbox is not checked). You can, however, override this and select specific registrations or all registrations.

5 **Button**

Click the `Send Reminders` button and you're off to the races!

Automatic Reminders

Manual reminders are nice, but automatic ones...well they're even better! If you provide a *Payment Reminder Time Span* on the registration template, Rock will send an automatic reminder to the registrations based on that timeframe. So, for example, if you provide the value of 30 for the *Payment Reminder Time Span*, they will receive a reminder every 30 days until their balance is paid. Reminders will not be sent if the *Payment Reminder Time Span* is set to "0" or left blank.

This sending is done through the *Event Payment Reminders* job under `System Settings > Jobs Administration`. This job does have one configuration parameter you should be aware of. The job *Cut-off Date* is the number of days past the registration close date to send reminders. After this cut-off, reminders will need to be sent manually to prevent eternal reminders.
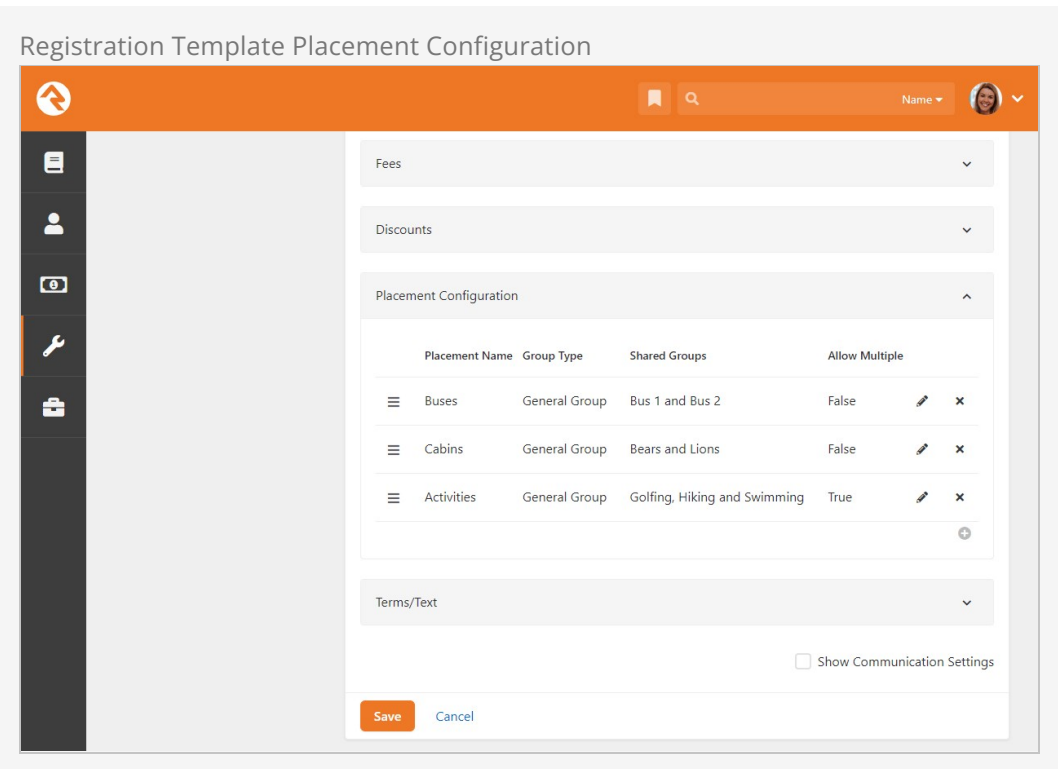
Registration Group Placements

Sometimes registration isn't over once all the information is collected. In fact, sometimes that's just the beginning. That's certainly the case with events like sports teams and camps. After everyone's registered, you still need to form teams and camp groups. This can be a daunting and laborious task, but that's where Rock's group placement features come to the rescue. They allow you to easily sort registrants into one or more groups with minimal effort.

For these tools to kick in, you need to first enable them on your registration template. Let's take a look at how that's done.

Placement Configuration

Registration templates have a panel called *Placement Configuration* where you can define areas into which registrants should be sorted. Ultimately this will mean placing registrants into groups, but those groups can be created and added later in the process. For now, let's look at the *Placement Configuration* options available in the registration template.

Registration Template Placement Configuration

From the *Placement Configuration* panel pictured above, you can see the list of the template's placements and a summary of their setup. After your template is configured, each of the items in this list will appear as a tab within the registration instance. Click the ⊕ button to add new placements to the list.

Edit Placement Configuration

1   **Name**
    Provide a name for the placement. This name will appear as a tab within the registration instance.

2   **Group Type**
    When adding a new placement, you are required to select a *Group Type*. This controls what type of groups registrants can be placed into.

3   **Icon CSS Class**
    You can optionally set an icon for the placement.

4   **Allow Multiple**
    If you select this box, then a single registrant can be placed into more than one group in this placement type. In the example pictured above this option is selected because registrants can participate in more than one activity. You probably wouldn't want to enable this for something like bus assignments, because each person should only be assigned to a single bus.

5   **Shared Groups**
    Use the ⊕ button to add groups to the *Shared Groups* list. This will be the list of groups into which you can place registrants, which we'll explore in detail below. These groups are shared across registration instances that use this template. Only want a group for a single instance? Read on, we'll cover that soon.

Once the placement feature is configured, you'll see an extra tab for each placement group you've defined. From these tabs you can quickly place the registrants into groups. Let's see how this works.

Registration Instance Group Placement

1. **Placements**
   In the example pictured above, there are three Shared placement areas. This matches the *Placement Configuration* list defined on the template.

2. **Add Group**
   Click this button to add a group to this registration instance. You can either create a new group directly from this page or you can add an existing group. The Archery group was added to the registration instance this way.

3. **Placement Configuration**
   Click the ⚙ icon to access additional placement configuration options. There are a lot of options here, so we'll discuss them in detail below.

4. **Registrants**
   A searchable list of registrants lets you easily drag and drop individuals

into the group placements on the right. If applicable, you can update the configuration (from the ⚙ icon) to display registrant attribute values such as "Cabin Preference".

⑤ **Placement Groups**
Each group into which a person can be placed is listed here. Group requirements and limits are enforced when adding individuals into these groups, so you can leverage the group's configuration to help ensure people are placed appropriately.

⑥ **Labels**
Placement groups that have been added to the registration template will appear with a "Shared" label. This is a handy reminder that the group is shared across registration instances. You can also use the `Add Group` button to add groups to this instance only, which assigns a label based on the instance name.

⑦ **Capacity Count**
If a group has a capacity, then this label will appear and will be updated automatically as registrants are placed. In the example pictured above, "Swimming" has a limit of 10 registrants with two spaces already taken by Brian Jones and Alex Decker.

Next, let's look at some of the placement configuration options available within the instance. These settings are used in addition to the registration template's placement setup. Click the ⚙ icon to access them.

Edit Instance Placement Configuration

1 **Campus Filter**
Selecting a campus here will only show placement groups for that campus. Placement groups without a campus assigned will always be shown.

2 **Highlight Genders**
If enabled, registrant names will be highlighted pink or blue according to the person's gender.

3 **Show Fees**
Enabling this option is useful for cases where a person should only be placed into a group if they have paid certain fees.

4 **Displayed Registrant Attributes**
Choose which attributes should be displayed for each registrant on the placement screen. This makes it easy to place camp registrants into their desired locations. You can choose whether or not to show these

attributes on placed registrants on the right side of the screen by setting the *Display Registrant Attributes on Group Members* option.

5 **Filters**
You can restrict the list of registrants by adding filters here. In the example pictured above, a filter can be added according to a registrant's fees. You can also add a person filter to, for example, filter by age or grade.

6 **Apply Registrant Filters to Group Members**
Here you can choose whether filters used for the registrants listed on the left should also apply to placed registrants on the right.

7 **Group Configuration**
You can choose to display Group and/or Group Member attributes if any are configured. You can also choose to *Hide Full Groups* if you don't want to display groups that have reached capacity. The filters listed in this area come from group and group member attributes.

Registration Template Placement Page

This page is a lot like the group placement tabs described above, with one key difference. This page references a template, combining the registrants from different instances. This is ideal for placing large volumes of registrants quickly and easily.

Registration Template Placement Page
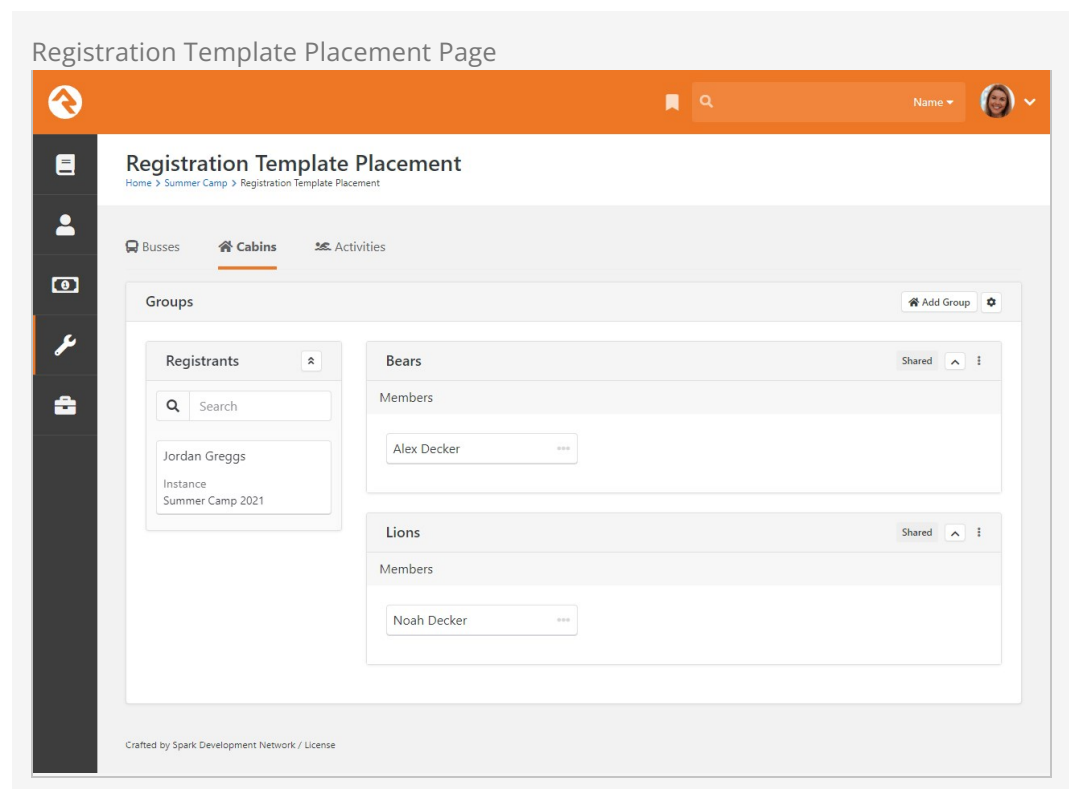
This page can be accessed from the registration template detail page by clicking the ⤨ icon as pictured below.

Access Registration Template Placement Page

Registration Finances

Paid registrations come with the additional complexity of having to work with money. Rock provides several tools to make this as simple as possible while also ensuring that there are good protections in place for proper accountability.

Adding Payments

While most of the time payments for events will be handled by the registrar during the registration process, you can manually enter payments on their behalf from the registration details page:

`Tools > Event Registration > Registration Template > Registration Instance > Registration`

(ok... that seems complex, but it's really not as bad as it looks on paper...)

From the *Registration Details* page, you can manage payments using the *Payments* tab pictured below.

Registration Payments
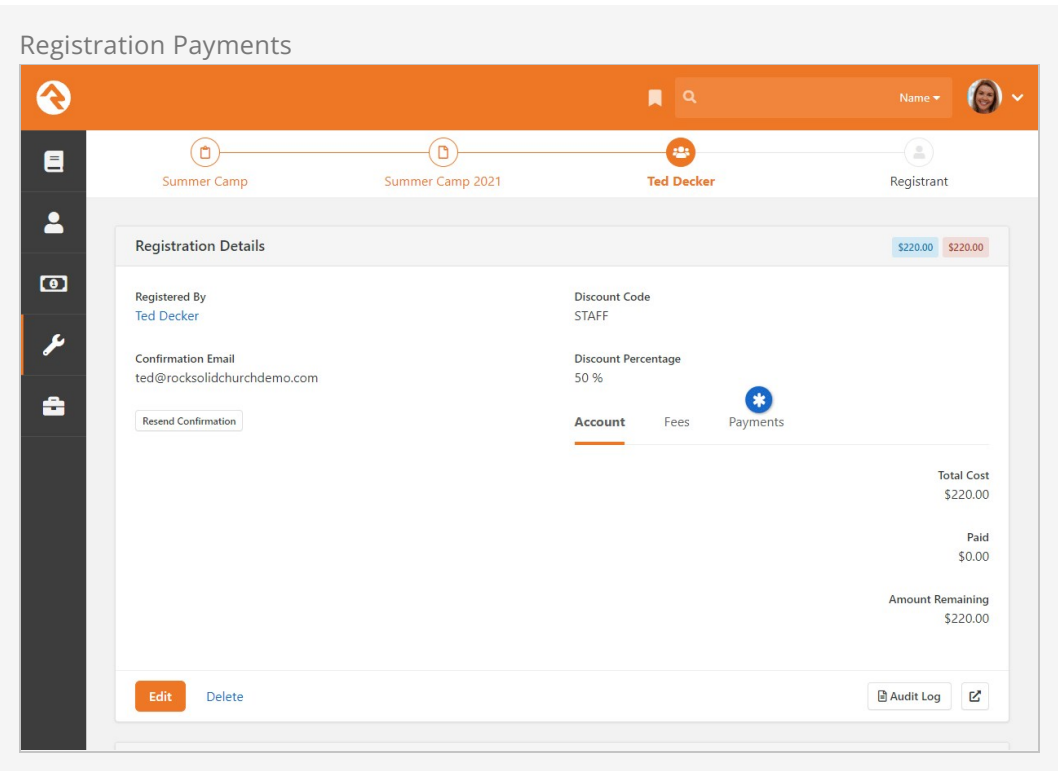
Once you click the link you will see the *Payments Edit Panel*. The screenshot below shows you all the options on this screen.

Payments Edit Panel

1 Payment Detail
Clicking on the date of the payment will take you to the financial transaction detail page for the payment. From here you can get more information about the payment and process a full or partial refund.

2 Process New Payment
Selecting this option allows you to run a new credit card payment through Rock. In order for this to work, the registration type's financial gateway must support the "hosted" mechanism. See the Configuring a Gateway section of the `Rock Your Finances` guide for more.

3 Add Manual Payment
This option allows you to enter the details of a manual (off-line) payment, like cash or check.

Refunds

Processing full or partial refunds through Rock is simple. Simply click the *Date / Time* link shown in call-out #1 above to proceed to the financial transaction detail page for the payment. From here you will see the screen below. Note the refund button at the bottom of the page.

Financial Transaction Detail

Clicking the `Refund` button will show the refund modal below.

Payments Edit Panel

Refund ✕

Amount * ①
$ 200.00

Reason * ②

Summary ③

☑ Process refund through financial gateway
④

Save Cancel

① **Amount**
This tells Rock how much the refund should be for. By default, the full amount of the financial transaction is entered into the box.

② **Refund Reason**
This dropdown allows you to pick from a standard set of refund reasons. You can modify this list under `Admin Tools > Settings > Defined Types > Refund Reasons`.

③ **Summary**
This field allows you to enter specific notes about the refund.

④ **Process Refund Through Gateway**
This checkbox determines if the refund should be automatically run through the payment gateway (checked) or just entered into Rock (unchecked).

Partial Payments

Partial payments are a popular feature for events with higher costs, like camps. The age ol' problem with them comes when it's time to complete the payments. Many times, people want to pay off the balance, but they're not sure how. Other times... well... they just need a reminder. Let's look at several strategies on how to make partial payments work for you.

> **Allowing Partial Payments**
>
> To allow partial payments, a *Minimum Initial Payment* amount must be provided in either the registration template or the registration instance (wherever the cost is being set).

Reminder Emails

The default email template for event reminders will provide a summary of the amount due with a link to complete the payment. Remember that the reminder emails can be sent out more than once by changing the send date to the future after the initial reminder goes out.

Recent Registration Block

Rock also ships with a *Recent Registration* block on the *My Account* page of the external website. This block, located under the Assessments list along the right of the page, shows registration information and notes if a payment is due. Clicking the link will take them to a page where they can complete the payment or apply a discount code. Note: this block only displays registrations that have an attached Calendar Event Item.

You'll want to review this block's settings. It can display registrations based on various criteria: recent registrations, future events, balances due, or any combination thereof. It's not limited to recent registrations only. There's also a Lava Template, which means you can customize how the block appears and what information it shows.

Recent Registration Block

Post-Registration Discount Codes

Not only does the *Recent Registration* block allow individuals to make payments against an outstanding balance, they can also apply a discount code (see Discounts). This is great if they find out about the discount after registering, or if they simply forgot to apply the code when they first registered.

To apply the discount code the individual needs to access the *Review Registration* page from the *Recent Registration* block, the same way they would to make a payment as described above.

Review Registration Page

Rock Solid Church Demo   New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Ted ▾

Registration

Review Registration

This Registration Was Completed By

First Name *
Ted

Last Name *
Decker

Send Confirmation Emails To *
✉ ted@rocksolidchurchdemo.com

Ted is in the same immediate family as *
◉ Noah Decker   ○ None

☑ Should Your Account Be Updated To Use This Email Address?

Payment Summary

① **Discount Code**
[   ]   ② Apply

Description	Amount
Noah Decker	**$ 200.00**
Camp Shirt-X-Large (1 @ $10.00)	$ 10.00
Total	**$ 210.00**

Total Cost
$110.00

Previously Paid
$50.00

Minimum Due Today
$0.00

Amount To Pay Today *
$ 0.00

Amount Remaining
$60.00

Payment Method

Card Number
[   ]

VISA   MasterCard   American Express   DISCOVER

Expiration Date
[▾] / [▾]

Card Security Code
[   ]

Previous   Finish

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① **Discount Code**
Individuals enter a discount code here to apply the discount toward their remaining balance.

② **Apply**
If a valid discount code has been entered, pressing the `Apply` button will immediately apply the discount to the individual's balance (pressing `Finish` is not required).

Individuals who have already paid in full will not be able to enter a discount code after registering. Similarly, individuals who have already used a discount code can't apply an

additional discount code.

If the discount ends up deducting more than the individual owed, the result will be a negative balance on their account. In that case you'll need to manually issue a refund (see Refunds) to get the balance back to zero.

Event Registration Matching

If you need to match event payments to transactions in a batch, *Event Registration Matching* is exactly what you're looking for. You'll find it under `Finance > Event Registration Matching`.

This lets you select a batch and a registration instance, then match transactions from that batch to individual registrations. This can be particularly helpful if you're using `Check Scanning` to process a set of registration payments, but it works with any transaction from any open batch.

Event Registration Matching

1. **Open Batches**
   You can select any open batch from this list. Keep in mind that the batch must be *Open* and not *Pending*.

2. **Registration Template**
   Select a registration template from the list. This is needed to select a registration instance of that template in the next field.

3 **Registration Instance**

Event Registration Matching works with a single registration instance at a time. The registration instance is used to identify the registrations that you'll be matching payments to.

4 **Hide Fully Paid Registrations**

It's unlikely that you'll be processing payments for registrations that have already been paid in full. Selecting this option lets you hide those registrations from the list. If you uncheck this box, all registrations for the selected instance will be made available for matching, even if they are paid in full.

5 **Matched Registration**

In this example screenshot we have already matched the first check to Noah Decker's registration. After selecting his registration, the drop-down menu is replaced by the name of the registrant and the date of the registration, for informational purposes. You can click the '**X**' to un-match this payment from the selected registration.

6 **Select Registration**

This row in the example screenshot has not yet been matched to a registration. The drop-down lets you search for a registration to match with the payment. The registrations you'll see here are controlled by the *Registration Instance* and *Hide Fully Paid Registrations* settings described above.

You'll notice there is no *Save* button on this page. As soon as a transaction is matched to a registration, the registration itself is updated behind the scenes in real time. For instance, we could view Noah Decker's registration right now and see that it has been paid in full. If we were to un-match that transaction from Noah's registration, that too would be updated in real time and anyone viewing the registration would see a balance owed.

Calendars

There are three components that make up Rock's calendar capabilities: Calendars, Events and Event Occurrences.

Calendar Components
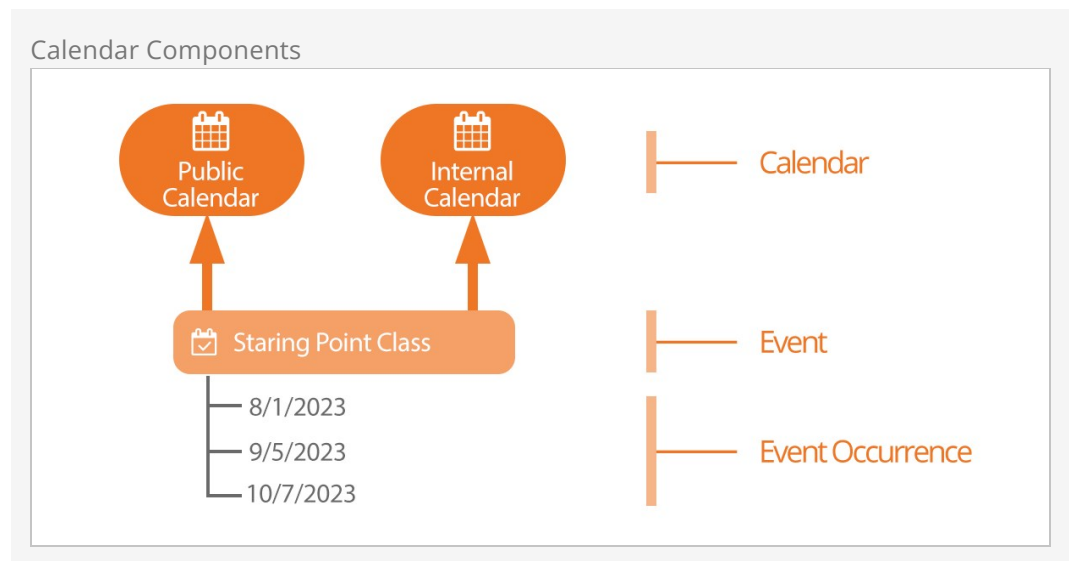
One might wonder why we need separate events and event occurrences. Couldn't we just put the schedule on the event and be done with it? That would certainly work, but there are cases where the same type of event, say Baptism, happens repeatedly. Having separate event and event items allows us to do things like list all the upcoming baptism dates.

Event Calendars

Every organization has the need for multiple calendars. Even a small organization will have a public and private (internal) calendar. Most will have several more. You can administrate calendars under `Tools > Calendars`.

Out of the box Rock ships with two pre-configured calendars:

- **Internal:** Used for internal events like staff meetings, retreats, etc.
- **Public:** For events targeted towards your members and attendees.

> ### Events Can Be Placed on More Than One Calendar
> Sometimes you'll have an event that should be displayed on more than one calendar. Rock supports this. An event can be on any number of calendars you'd like.

Calendar List
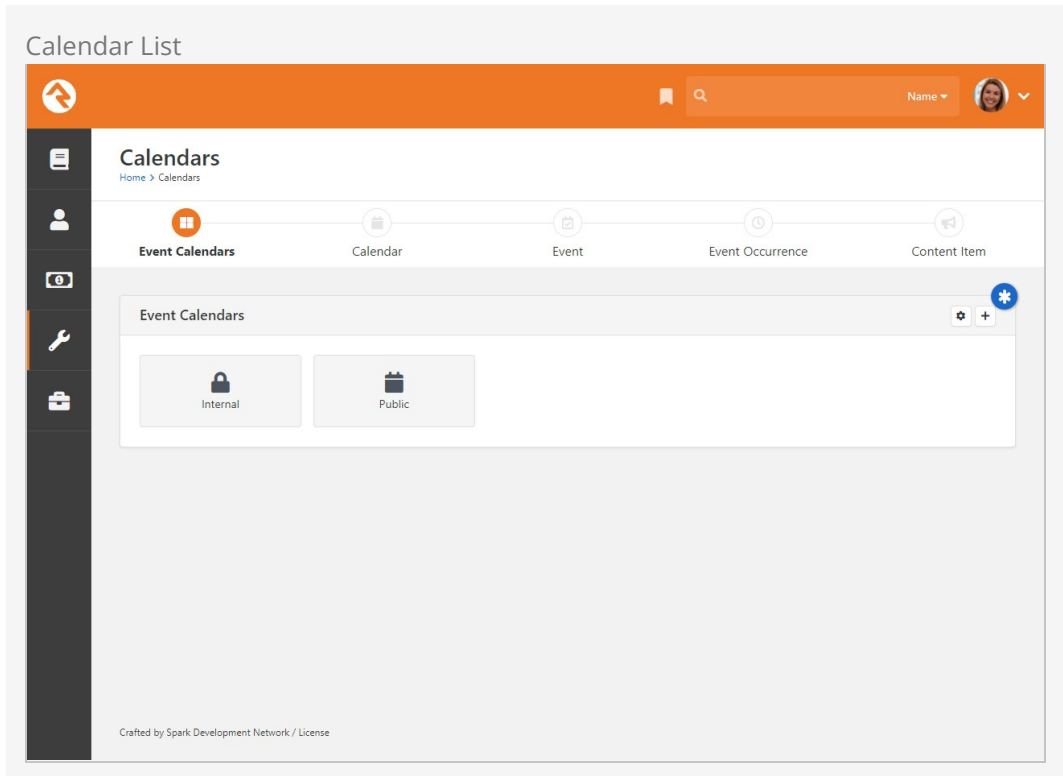
You can add additional calendars by selecting the add button in the upper right of the panel, as pictured above. When adding or editing a calendar you will see the screen below:

Calendar Details

1 **Name**
   The name of the calendar.

2 **Active**
   Whether the calendar is currently active.

3 **Description**
   A quick reminder of what the calendar is for and how it should be used.

4 **Icon CSS Class**
   The Font Awesome icon class the calendar should use.

5 **Indexing Enabled**
   Event Items can be indexed for use by `Universal Search`. This is set here at the calendar level.

6 **Event Attributes**
   Each calendar can define custom attributes available to the events that are on them. This is where you define these attributes.

7 Content Channels
We'll cover content channels later in the Bringing It All Together chapter. For now, just know that you can link content channels to events to allow you to easily promote them.

Calendar Security

You can set up security for each calendar you define. This allows you to delegate the management of these calendars and their events. You set security from the *Calendar Details Page* by pressing the 🔒 button.

Events

Once you've created your calendar, you're ready to place events on them.

`Tools > Calendars > Calendar`

Shows a list of the current events for a calendar on the *Calendar Details Page*. As you get more and more events, you'll want to start using the filters on this grid to help you manage the events that are displayed.

The event add/edit screen below shows you how to manage the events on the calendar.

Calendar Details

① **Name**
The name of the event.

② **Active**
Whether the event is currently active.

② **Approved**
If you have 'Approval' permission to the calendar, you'll be able to approve the event here.

④ **Summary**
A quick description of the event that will display on the calendar when listing multiple events.

⑤ **Description**
A more complete description of the event that will be displayed on the event detail page.

⑥ **Audiences**
This helps to categorize the events by those who would be most interested. These are the same audience choices that are used for the other web content channels.

⑦ **Photo**
A picture is worth a thousand words, right? So don't skimp - include one on your event.

⑧ **Additional Calendars**
As we mentioned above, you can place your event on as many calendars as you'd like.

⑨ **Details URL**
If you provide a web address here it will be used instead of the Rock event details page when your guests click 'More Information' from the calendar.

⑩ **Attribute Values**
Remember how we could define custom attributes for the events on custom calendars? This is where you'll add the values for these attributes. The attributes are grouped by calendar.

⑪ **Event Occurrence Attributes**
Define an attribute on an Event Item where the value is set on each of its Event Item Occurrences.

> **Follow An Event**
>
> After saving an event you can choose to follow it by selecting the ☆ icon in the upper right corner of the details block. This will add it to the list of followed events on `your dashboard`.

Event Occurrences

We have our calendar and now, events. All that's left is to add the event occurrences that determine when these events occur. Some events may only occur once, while

others apply often. Either way, you'll add the occurrences from the *Event Details Page.*

Event Instance Edit

1 **Campus**
First, we must select which campus this event will occur on (single campus organizations can select either all or the main campus).

2 **Contact Information**
Next, we select who the contact will be and provide their email and phone number.

3 **Location Description**
Now we can describe the location where the event will be held. Instead of using a location picker, we decided to allow you to enter a more descriptive text of where the event is being held.

4 **Schedule**
Ok, now for the important part. When will the event occur? Hopefully by now you've had a chance to use the *Rock Schedule Builder* tool in other features. It's a powerful tool for defining complex re-occurring schedules. It also does simple one-time schedules too.

5 **Linkages**
Most often, you'll want to create a registration for your calendar event. Instead of having to leave the screen to create the registration instance, you can do it right here. You can also link to an existing registration instance, or simply link the event to a slug without linking to any registration instance. We'll talk more about how to do all this in the Bringing It All Together chapter.

6 Occurrence Note

This note will be shown on the calendar detail screen on the public website. It's used to provide custom notes about the specific occurrence.

You might be thinking, *"Hey! Reoccurring schedules? I thought we were supposed to create a new occurrence each time the event occurred?"* Yes... and no... Some occurrences of an event may last two to three weeks (say a single occurrence of a three-week stewardship class). In this case, make a single occurrence with a reoccurring schedule.

Once you save your calendar occurrence, you'll be taken to the occurrence detail screen. From here you'll see that you can click the ⊕ button to add a new content channel item, or you can click the 🔗 button to link to an existing content channel item. Adding and connecting with content channel items allows you to enter and track promos for your event.

Event Instance Detail

Event Occurrence Attributes

You can create specific attributes to assign to event occurrences. For example, you could create a "Lunch Provided?" attribute to use with recurring staff meetings. Then for each meeting assign that attribute a value of "Yes" or "No". As with all attributes, the possibilities are endless and completely customizable for your organization's needs. Keep in mind when creating these attributes, they will be available for every calendar event.

To create an event occurrence attribute value, click the ⚙ button on the main *Event Calendars* screen to access the Calendar Attributes screen.

Calendar Attributes
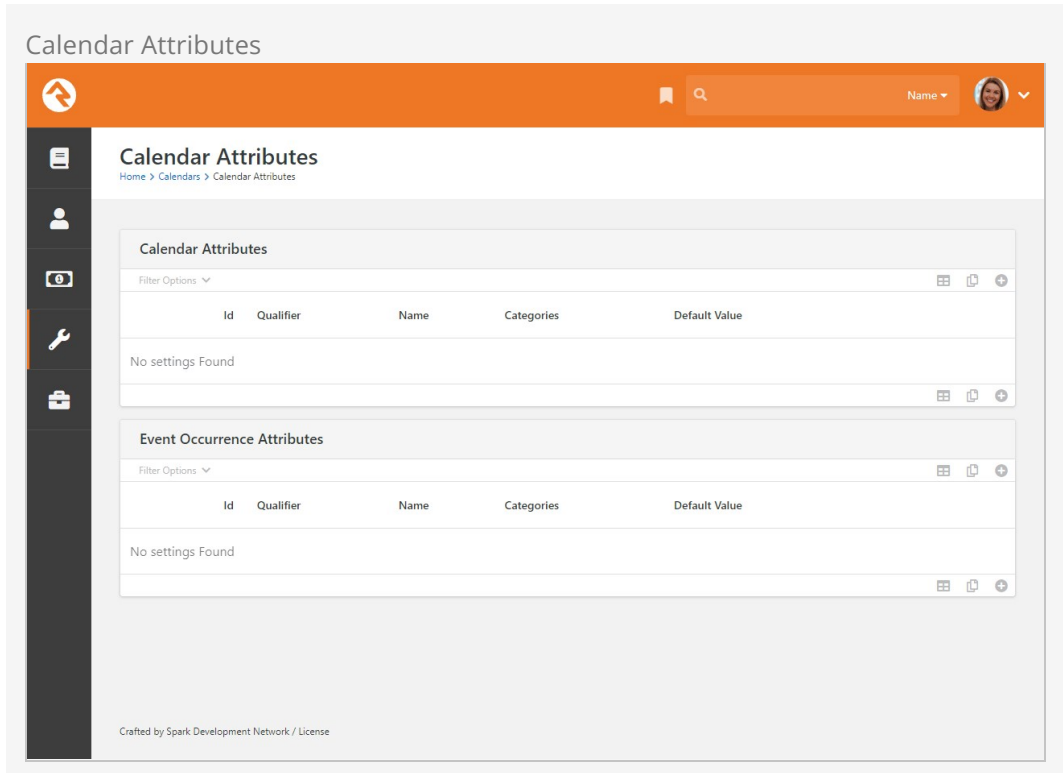
In the *Event Occurrence Attributes* section, click the ⊕ button to create the new attribute. Once saved, the attribute is available in the *Attribute Values* section of the event's *Edit Event Occurrence* screen.

Event Item Occurrence Attributes

Hang on, what if I know an attribute will ONLY be used for one event occurrence? Well, in this case, you can set your attributes within the Event Details, such as your staff meetings. Scroll to the bottom of the *Event Details* page for the *Event Occurrence Attributes* panel and expand it. Click the ⊕ button to add a new attribute.

Event Item Attributes

Now in the *Attribute Values* section of the event's *Edit Event Occurrence* screen, you will see all the specific event attributes along with the global attributes created in the Calendar Attributes screen.

Calendar Blocks

Below is what the calendar looks like on the external website. These blocks have a ton of settings (much of the page is rendered in Lava so the possibilities are endless).

Calendar Block

Event Detail Block

iCalendar Feed

Once you have your event calendars up and running, you can use Rock's iCalendar feed feature to create dynamic calendars in Outlook, iOS, OSX iCal, Google Calendar and Android. This means you and the members of your organization can have access to event calendars right in your pocket. The iCalendar feed is accessed by URL, which you add to your email client or calendar program. The process will vary depending on the program you're using, but most programs have an option for adding a calendar from an internet address. Once you add the event calendar URL to your program, it will sync and stay updated with that calendar in Rock.

Calendar Settings and Formatting

There are a couple of things about the iCalendar feed you should know before going forward. First of all, any security added to calendars is enforced, so you need to have access to any non-public calendars you want to use with the iCalendar feed. Second, Rock takes care of providing and formatting the calendar content. You can, however, customize the calendar's description by adding the following Lava to the Lava template:

```
{{ EventItem.Description }}

{{ EventItemOccurrence.Note }}
```

(Remember, Lava templates can be found at `Admin Tools > Settings > Defined Types > Lava Templates`.)

OK, let's take a look at the iCalendar URL itself.

Calendar URL

The calendar URL has a specific format:

```
http://rocksolidchurchdemo.org/GetEventCalendarFeed.ashx?calendarid=1
```

This sample URL provides the feed for a calendar located at rocksolidchurchdemo.org with an ID of "1".

There are three parts to the URL: the organization's domain name (i.e., rocksolidchurchdemo.org), the GetEventCalendarFeed function, and the calendar parameters (i.e., calendarid=1). The domain name and the parameters will change according to the organization and the desired calendar options, but the GetEventCalendarFeed.ashx portion **must remain unchanged** in order for the feed to

work.

Let's take a closer look at the parameters available for customizing the calendar feed. You can use parameters to tell the feed to pull only events from a specific campus, specified dates, or even from a certain Lava template. The following parameters are available with the iCalendar feed:

Parameter	Description	Example
templateid	The Lava template ID for the iCalendar description. If this is not specified, the default is used. The default is a concatenation of the EventItem Description and the EventItemOccurrence Note.	templateid=1234
campusids	A comma separated list of campus IDs. Default is all campuses.	campusids=2,4,12,9
audienceids	A comma separated list of audience IDs. Default is all audiences.	audienceids=5,6
startdate	The earliest date to get calendar info. Format: yyyyMMdd. Default is the current day.	startdate=20180501
enddate	The latest date to get calendar info. Format: yyyyMMdd. Default is two months from the startdate.	enddate=20180701

So, using our same URL sample above, if you want to grab the feed for events on the public calendar from April 1, 2018 through July 7, 2018, the URL feed would be:

```
http://RockSolidChurchDemo.org/GetEventCalendarFeed.ashx?calendarid=1&startDate=20180401&enddate=20180707
```

To filter the above URL for two audience types, the URL would be:

```
http://RockSolidChurchDemo.org/GetEventCalendarFeed.ashx?calendarid=1&startDate=20180401&enddate=20180707&audienceIds=147,1698
```

Now, you could build the iCalendar feed URL yourself; but to make things super easy, you can also quickly grab the URL for the event calendar you want to use by going to the *Event Calendar* screen and clicking the `Export Calendar Feed` button. This will copy the URL to your clipboard.

Export Calendar Feed

Bringing It All Together

Hopefully you're starting to see the symbiotic relationship between event registrations and calendar events. The fact that they share the same manual should tell you that they go together like peas and carrots (or steak and potatoes). We've also seen that groups can be linked to registrations, and that content channels also have a role with calendar events.
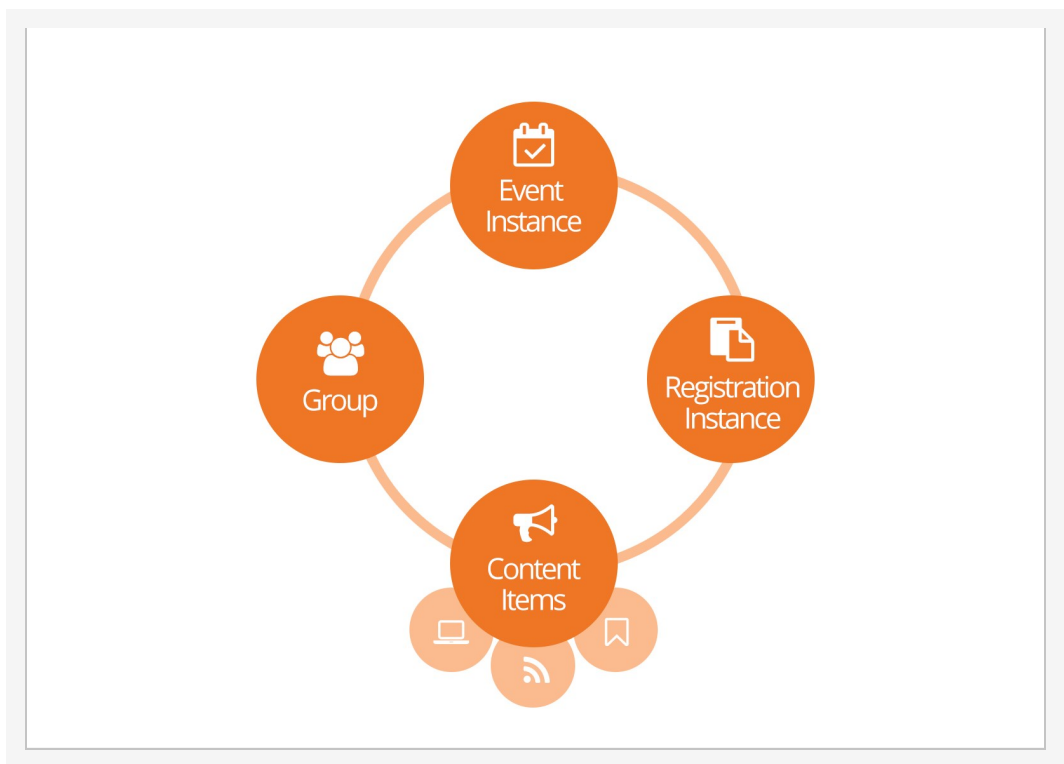
You might be wondering how you're going to manage all these items for a specific event. We did too, so we worked hard to make it as simple as possible. Here's how.

While you can link registrations, events, groups and content channel items many different ways, here's the easiest:

1. Create your event group that the registration will place registrants into.
2. Create your calendar event and occurrence.
3. While editing your occurrence select the `Add Linkage` button. There are a few linkage options for you, which we'll summarize here and then describe in more detail below.

1. **No Registration Required:** Select this option if you're not linking the event to a registration. This lets you link a URL Slug to the event without needing a registration instance.
2. **Create Registration Instance:** This lets you set up a new registration instance directly from the calendar occurrence instead of creating it separately and having to link them later.
3. **Use Existing Registration Instance:** If you already have a registration instance created then you can use this option to link it to this event occurrence.

4. After saving the occurrence, you can optionally enter any content channel items you need for your event. See below for more details.

Once you create these linkages, you can view and manage them from either the calendar occurrence, group or event instance detail screens.

URL Slug Required

The URL Slug **must be used** in order to have event registrants be automatically placed into the correct group.

Adding Calendar Linkages

As noted in the section above, you have different linkage options available to you when creating a new calendar event and occurrence. In this section we'll look at each option in detail.

No Registration Required

Select this option when you don't need a registration but still want to have a URL slug associated with an event.

No Registration Required

In the example pictured above we're not linking the calendar occurrence to any registration instance. However, we can still create a handy URL slug.

> ### URL Slugs: Say what?!
> A "slug" is a common web term that refers to a part of a web address that identifies a page, or component of a page, using human-readable keywords. If you're not Noah Webster, that means instead of saying `Registration?RegistrationInstanceId=153` you can say `Registration/SummerCamp2021`. In most cases the slug can be whatever you want but try to use only letters and numbers (e.g., SummerCamp2021) if possible because some special characters may cause issues with browsers. Keeping that in mind, dashes are commonly used (e.g., Summer-Camp-2021) without causing problems.

Keep in mind when using the *No Registration Required* option that you might need to add some page routes on your external site. To get the URL slug to work, you'll need a page route similar to `events/{slug}` or `campinfo/{slug}` on the page that has the *Calendar Event Item Occurrence Lava* block. The route must include `{slug}` because this tells the system where to look for the linked event occurrence.

Create Registration Instance

You would use *Create Event Registration Instance* if you want to link the event occurrence to a registration instance that hasn't been created yet. This means you can create a registration instance directly from the calendar instead of creating it separately and having to link them later.

Create Registration Instance

If the screen pictured above looks familiar, that's because it's the same information you'd use to create a registration instance from outside of the calendar. Just like any time you add a registration instance, you need to have a registration template set up first. If a template doesn't exist for the instance you're trying to create, you'll have to go back and add one.

Use Existing Registration Instance

You'll use this option if you already have a registration instance that just needs to be linked to this calendar occurrence.

As you can see in the example pictured above, all you'll need to do is pick the template and instance, and then give it a Public Name. Like the other options, you can also create a slug and link to a group from here.

Linking Content Channel Items

After saving the event occurrence, you can optionally create or link to any content channel items you need for your event. This is a great way to get the word out about the event. When viewing the occurrence, there is an area at the bottom of the page for *Content Channels*.

Add Content Channel Item

① **Event Occurrence**
Content channel items are added to the event occurrence. For details on how to get to this point, see the Calendars chapter above.

② **Content Channels**
You can only add content channel items to the content channels listed here. The list of available content channels is configured at the Calendar (e.g., Public, Internal) level.

③ **Add New Item**
Clicking the ⊕ button lets you add a new content channel item to the corresponding content channel.

④ **Link Existing Item**
You can click the ⚭ button to link the event occurrence to a content channel item that has already been created.

For more details on creating and working with content channels, check out our `Designing and Building Websites Using Rock` manual.

Securing Calendars and Events

There are two security roles that help secure the management of calendars and events. Let's look at each.

Securing Calendars

While those in the *RSR - Staff Workers* and *RSR - Staff Like Workers* roles can view and add new events, only those in the *RSR - Calendar Administration* can approve events and create new calendars.

Securing Event Registrations

Like calendars, those in the *RSR - Staff Workers* and *RSR - Staff Like Workers* roles can create new instances of registrations, but only those in the *RSR - Event Registration Administration* can create new registration templates.

Individuals can edit event registration templates in two ways:

- If they have *Administrate"* permissions for the specific template.
- If they have *Edit"* permissions on the block security, allowing them to edit any template using the block.

To limit access, remove the individual from this role and grant them permissions for specific registration templates instead.

From a financial perspective anyone in the staff/staff-like roles can add payments to a registration but out of the box you will need to be in the *RSR - Finance Administration* role to process refunds.

Event Blocks

How you decide to display events to your guests will be very unique. Rock provides several blocks to help you craft the experience you desire.

See our `Designing and Building Websites Using Rock` guide for more information on blocks in general.

Calendar Block

The *Calendar Lava* block is the basic calendar list block for your external calendar. The screen shot below shows the block in its default form, however this block comes with a ton of settings to change the way it is displayed. Below is a list of some of the settings that this block provides.

- **Event Calendar:** The calendar (public, internal, etc.) to pull events from.
- **Default View Option:** Which view option (day, week or month) to initially show.
- **Details Page:** The page to navigate to, to show the event's details.
- **Campus Filter Display Mode:** Options to show a campus filter (Hidden, Plain, Panel Open, Panel Closed).
- **Audience Filter Display Mode:** Options to show an audience filter (Hidden, Plain, Panel Open, Panel Closed).
- **Filter Audiences:** Allows you to filter which audiences you'd like to show as filter options.
- **Show Date Range Filter:** Determines whether a date range filter should be displayed.
- **Show Small Calendar:** Determines whether the small calendar in the upper left should be shown.
- **Show Day View:** Determines whether the day view should be shown as an option.
- **Show Week View:** Determines whether the week view should be shown as an option.
- **Show Month View:** Determines whether the month view should be shown as an option.
- **Enable Campus Context:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site).
- **Lava Template:** The Lava template that will be used to format the list of filtered events.
- **Start of Week Day:** Determines what day is the start of a week.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.

External Calendar

Event Item Occurrence Detail

Once you pick an event from the calendar, the *Calendar Event Item Occurrence Lava* block displays the details for the event occurrence. This page is formatted entirely using Lava, so customize at will. Below are the options you have in the block's settings.

- **Registration Page:** The page to navigate to for registration.
- **Set Page Title:** Determines if the block should set the page title with the event item name.
- **Lava Template:** The Lava template that will be used to format the list of filtered events.

Event Occurrence Detail

Calendar Item Occurrence List Lava

This is more of a specialty block. It lists upcoming occurrences for a specific event item. This is helpful for events like specific classes (e.g., Starting Point, Stewardship Class) or events that routinely happen (e.g., Baptisms).

- **Event Item:** The event item to show occurrences for.
- **Campuses:** Which campuses to show occurrences for.
- **Use Campus Context:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site).
- **Date Range:** You can filter the occurrence list by a sliding date range (e.g., upcoming two weeks).
- **Max Occurrences:** The maximum number of occurrences to show.
- **Registration Page:** The page to navigate to for registration.
- **Lava Template:** The Lava template that will be used to format the list of filtered events.

Calendar Item Occurrence List Lava

REGISTER FOR
BAPTISMS PHOENIX CAMPUS

Saturday, Jan 16 / 5:45PM

Sunday, Jan 17 / 10:15AM

Saturday, Feb 20 / 5:45PM

Sunday, Feb 21 / 10:15AM

Calendar Item Occurrence List By Audience Lava

This is another specialty block. It lists upcoming occurrences for a specific audience (All Church, Youth, Children, etc.). This is helpful for pages devoted to these audiences. Below are some of the options available in the block's settings.

- **Audience:** The audience to filter on.
- **Calendar:** Which calendar to use.
- **Use Campus Context:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site).
- **Date Range:** You can filter the occurrence list by a sliding date range (e.g., upcoming two weeks).
- **Max Occurrences:** The maximum number of occurrences to show.
- **Registration Page:** The page to navigate to for registration.
- **Lava Template:** The Lava template that will be used to format the list of filtered events.

Calendar Item Occurrence List By Audience Lava

Upcoming Events

Warrior Youth Event Tuesday, Dec 15 / 12:49PM

Summer Camp 2015 Thursday, Jun 30 / 12:00AM

Event Calendar Item Personalized Registration

This is a quirky, but insanely cool little block. Its main use is to facilitate internal registrations for special classes from an individual's *Person Profile* page. Let's dig into a sample to understand this better.

Say your organization has a special orientation class called *Starting Point*. Previous attendance in this class is really important to you so you've created a special badge to show if someone has attended this class. But... you also want to easily be able to register people for upcoming classes when they call or email you. You can then set the

markup of your badge to link to a page with this block if they have not attended *Starting Point*. This block takes the person and looks up upcoming class dates based on their campus. Once you select a date you can select other members of the family and create a registration to add them to the class.

It should be noted that this block creates an online registration and then redirects to the registration block to complete the process. This allows for the collection of extra fields configured for the registration and also allows for things like confirmation and reminder emails.

- **Include Family Members:** Determines if a list of family members should be displayed to include in the registration.
- **Days In Range:** The number of days in the future to filter event occurrences for.
- **Max Display Events:** The maximum number of occurrences to show.
- **Registration Page:** The page to redirect to, to complete the registration.
- **Start Registration At Beginning:** You can optionally choose to redirect to the beginning of the registration process (a good option if you expect additional custom fields to be needed) or the end (a good option if additional fields are not needed as you can quickly complete the registration).

The block requires the following inputs through the URL:

- **PersonGuid:** The Guid of the person to be registered.
- **EventItemId:** The Id of the event item to process the registration for.

Event Calendar Item Personalized Registration