

JANUARY

			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

APRIL

MAY

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6	7	8	9	10	11	12	
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20	21	22	23	24	25	26	
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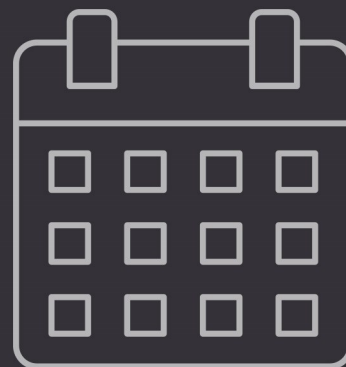
			1	2	3	
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AUGUST

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3	4	5	6	7	8	9
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31						

SEPTEMBER

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EVENT CALENDAR GUIDE

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)
- 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 split between templates and instances has one final benefit. It allows you to separate security for configuring a registration from the security settings for implementing a new registration. For instance, you'll probably want to limit who can adjust costs, fees and discounts, while delegating who can set up a new registration for a reoccurring event.

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 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 let's make 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

Rock Solid Church Demo

New Here?

Resources

Connect

Give

Blog

Calendar

Watch

Hello Ted ▾

Summer Camp 2020

[Home](#) / [Calendar](#) / Summer Camp 2020

How many registrants will you be registering?

-

3

+

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2

Rock Solid Church Demo

New Here?

Resources

Connect

Give

Blog

Calendar

Watch

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First Registrant

Registrant is in the same immediate family as *

☐ Ted Decker

☒ None of the above

First Name *

Katie

Last Name *

Franks

Birthday *

Apr ▾

/

4 ▾

/

2008 ▾

Gender *

Female ▾

Leader Preference *

Cindy

Cabin Preference *

With Alexis Decker

Additional Options

Camp Shirt

Large (\$10.00) ▾

Previous

Next

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Version: 1.11.0

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Last Updated: 10/5/2020

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Second Registrant

Alexis is in the same immediate family as *

☐ Katie Franks

☒ None of the above

First Name *

Alexis

Last Name *

Decker

Birthday *

Feb ▾

/ 10 ▾

/ 2008 ▾

Gender *

Female ▾

Leader Preference *

Cindy Decker

Cabin Preference *

With Katie Franks

Additional Options

Camp Shirt

Small (\$10.00) ▾

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Third Registrant

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 / 2005

Gender *

Male

Leader Preference *

Ted Decker

Cabin Preference *

Any

Additional Options

Camp shirt

Medium (\$10.00)

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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 *

☐ Katie Franks ☒ Alexis & Noah Decker ☐ None☒ Should Your Account Be Updated To Use This Email Address?

Payment Summary

Discount Code

Description	Amount
Katie Franks	\$ 200.00
Camp Shirt-Large (1 @ \$10.00)	\$ 10.00
Alexis Decker	\$ 200.00
Camp Shirt-Small (1 @ \$10.00)	\$ 10.00
Noah Decker	\$ 200.00
Camp Shirt-Medium (1 @ \$10.00)	\$ 10.00
Total	\$ 630.00
	Total Cost
	\$630.00

Minimum Due Today

\$0.00

Amount To Pay Today *

\$ 630.00

Amount Remaining

\$0.00

Payment Method

Card Number

Expiration Date

 /

Card Security Code

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

Summer Camp 2020

[Home](#) / [Calendar](#) / Summer Camp 2020

Congratulations Ted

You have successfully registered the following registrants for Summer Camp 2020:

- **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 6/2/2020 (Acct #: *****4444, Ref #: T20200602171952832)
Balance Due: \$0.00

A confirmation email has been sent to ted@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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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 Information 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 Information 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 Information 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 Payment

Now it's time to pay up! Here we see a nice break down of the costs and fees. We have the opportunity to enter a `discount code` as well as enter the amount we wish 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 Confirmation

Done!

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

Event Wizard

Home > Event Wizard

Event Registration Wizard - Choose a Template

Registration Template Registration Group Event Event Occurrence Summary

Registration Template ¹

Campus ²

Contact ³

Alisha Admin

Contact Email

admin@organization.com

Contact Phone

Next

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1 Registration Template

A drop down with preconfigured registration templates. This will populate the instance 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 amount of people allowed to attend the event
- 6 Cost**
 Registration Cost
- 7 Account**
 The account where the payments will be collected. This can be set by default in the template. It is a required field.
- 8 Public Name**
 This section will autofill from the registration name. It can optionally be changed to something different from the registration name
- 9 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 certain browsers.

10 Registration Customization

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

Registration Instance

The screenshot shows the 'Event Wizard - Group' registration form. At the top, there's a navigation bar with an orange header and a dark sidebar. The main content area has a breadcrumb trail 'Home > Event Wizard'. Below this, a progress bar shows six steps: 'Registration Template', 'Registration', 'Group' (current step), 'Event', 'Event Occurrence', and 'Summary'. The 'Group' step is highlighted with an orange circle. The form fields are: 'New Group Name' (text input with a blue '1' marker), 'Parent Group' (dropdown menu with a blue '2' marker), 'Location' (dropdown menu with a blue '3' marker), and 'Schedule' (dropdown menu with a blue '4' marker). There are 'Previous' and 'Next' buttons at the bottom. A footer note says 'Crafted by the Spark Development Network / License'.

1 New Group Name

Create your event group that the registration will place registrants into

2 Parent Group

Choose a parent group for the new group to be under

3 Location

Based on the check-in block settings this option will be available

4 Schedule

Follows the same rules as the location option

The screenshot shows the 'Event Wizard' interface within a 'Registration Instance' application. The interface has a dark sidebar on the left with icons for navigation. The main content area has an orange header bar with a search icon and a user profile icon. Below the header, the title 'Event Wizard' is displayed with a breadcrumb 'Home > Event Wizard'. The main content area features a progress bar with six steps: 'Registration Template', 'Registration', 'Group', 'Event', 'Event Occurrence', and 'Summary'. The 'Event' step is currently active and highlighted. Below the progress bar, there are two tabs: 'Existing Event' and 'New Event'. The 'New Event' tab is selected, and a blue circle with the number '2' is next to it. Below the tabs, there is a dropdown menu labeled 'Event' with a blue circle and the number '1' next to it. The dropdown menu is currently empty. Below the dropdown menu, there are two buttons: 'Previous' and 'Next'. The 'Next' button is orange and highlighted. At the bottom of the main content area, there is a small text credit: 'Crafted by the Spark Development Network / License'.

- 1 Event**
Dropdown to choose a preconfigured Event Item from the calendar list
- 2 New Event**
If the block setting allows for it, the user can create a new event on this page

The description where the event will be held

When will the event occur? Check out the Event Occurrences section for more details

This note will be shown on the calendar details screen on the public website

Event Wizard Block Properties

Event Registration Wizard

Event / Id: 940

Basic Settings

Advanced Settings

1 Name *

Event Registration Wizard

2 Default Account ⓘ

Event Registration

3 Default Calendar ⓘ

Public

4 Available Registration Templates ⓘ

5 Root Group ⓘ

6 Registration Instance Page ⓘ

Registration Instanc...

(1 route exists)

7 Group Viewer Page ⓘ

Group Viewer

(1 route exists)

8 Require Group ⓘ *

No

9 Set Registration Instance Active ⓘ *

Yes

10 Enable Calendar Events ⓘ *

Yes

11 Allow Creating New Calendar Events ⓘ *

Yes

12 Require Calendar Events ⓘ *

Yes

13 Include Inactive Calendar Items ⓘ

Yes

14 Completion Workflow ⓘ

15 Check-In Group Types ⓘ

☐ Acme Certificates
☐ Application Group
☐ Best Groups
☐ Campus Team
☐ Check In
☐ Check in by Ability Level
☐ Check in by Age
☐ Check in by Data View

☐ Check in by Grade
☐ Check-in Test Area
☐ Communication List
☐ Elementary Area
☐ Family
☐ Fundraising Opportunity
☐ General Group
☐ Global Outreach

☐ High School Area
☐ Inherit Fundraising
☐ Jr High Area
☐ Known Relationship
☐ Nursery/Preschool Area
☐ Organization Unit
☐ Peer Network
☐ Security Role

☐ Service Attendance
☐ Services
☐ Serving Team
☐ Small Group
☐ Small Group Section
☐ Volunteer Check-in
☐ Weekly Service Check-in

16 Display Link to Event Details Page on Confirmation Screen ⓘ

No

17 External Event Details Page ⓘ

Event Details

Save

Cancel

1 Name
Block property name

2 Default Account
Selects the financial account which will be pre-filled on page 2 if the cost is set on the instance

3 Default Calendar
The default calendar which will be pre-selected 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 unchecked, 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 4 and create both a new event and a new occurrence for that event
- 12 Require Calendar Event**
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 Event**
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**
Check this box 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 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

General Settings

Event Registration

Home > Summer Camp

Summer Camp

Instance

Registration

Registrant

+

 Add Category

Registration Template

Connection

General

Summer Camp

Winter Camp

School of Ministry

Summer Camps

Ministry

Summer Camp

General

1

Name

2

Active

3

Category

4

Description

Details

Group Type

General Group

Group Member Role

Member

Group Member Status

Active

Allow Multiple Registrants

Yes

Max Registrants Per Registration

Registrants In Same Family

No

Yes

Ask

Show Family Members

Yes

Enable Wait List

Yes

Registrar Options

Prompt For Registrar

11

Notify

Registration

Contact

Group Followers

Group Leaders

12

Add Person Note

Yes

13

Login Required

Yes

14

Set Cost On

Instance

Template

Version: 1.11.0

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Last Updated: 10/5/2020

Cost 15 \$ 200.00

Minimum Initial Payment 16 \$ 0.00

Default Payment Amount 19 \$

Financial Gateway 17 Test Gateway

Batch Prefix 18 SummerCamps_

Registration Workflow 20

Allow External Updates to Saved Registrations 21 ☒ Yes

Required Signature Document 22

In-Line Signature 23 ☐ Yes

Registrant Form(s)

Registration Attributes

Fees

Discounts

Placement Configuration

Terms/Text

Save Cancel

Show Communication Settings 23

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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 Maximum Registrants

This indicates how many people you can register at one time.

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 The Same Family

Creating the family structures during the registration process can be tricky. This setting allows you to give Rock hints about the people that 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 the family make-up.

9a Show Family Members

Selecting *Yes* or *Ask* on the previous *Registrants in same Family* option, will enable this setting. Checking *Yes* here allow users 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.

10 Enable Wait List

Checking this box will enable the waitlist functionality. See the chapter on waitlists below.

11 Notify

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

12 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.

13 Login Required

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

14 Set Cost On

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

15 Cost

The cost of the registration.

16 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.

17 Financial Gateway

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

18 Batch Name Prefix

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

19 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

20 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.

21 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.

22 Required Signature Document

Here you can set a digital signature document to be sent out after each registration. The 'In-line Signature' setting determines if the digital signature should occur during the registration process (after filling in each registrant) or if the request for a digital signature should be sent via email after the registration is complete.

23 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.

Digital Signatures

Let's take a moment to point out a really powerful feature that we glossed over a bit. Rock can automate the sending of requests to get digital 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	Use Current Value	Required	Show on Grid	Show on Wait List			
First Name	Person Field					✓	✓	✓			
Last Name	Person Field					✓	✓	✓			
Birthdate	Person Field					✓		✓			
Gender	Registrant Attribute	Gender				✓		✓			
Team Color Preference	Registrant Attribute	Single-Select						✓			
Team Color Preference	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.

The screenshot shows the 'Form Field Editor' window with a title bar 'Registrant Form Field' and 'Id: 0'. The interface is divided into several sections:

- Source:** A dropdown menu currently set to 'Person Field'.
- Person Field:** A dropdown menu currently set to 'Address'.
- Internal Field:** A checkbox labeled 'Yes'.
- Common Value:** A checkbox labeled 'Yes'.
- Use Current Value:** A checkbox labeled 'Yes'.
- Required:** A checkbox labeled 'Yes'.
- Show on Grid:** A checkbox labeled 'Yes'.
- Show On Wait List:** A checkbox labeled 'Yes'.
- Pre-HTML:** A text area for entering HTML code before the field.
- Post-HTML:** A text area for entering HTML code after the field.

At the bottom right, there are 'Save' and 'Cancel' buttons.

When adding fields, you have your choice of where and how they're stored. Let's look at each type.

- **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
- **Person Attribute:** This type allows you to take what they've entered and place it into a person attribute.
- **Group Member Attribute:** This allows you to store their entered values into a group member attribute of the linked group.
- **Registration Attribute:** The final type allows you to configure new attributes that will be stored within the registration.

You'll notice a few other settings on the add screen. These settings allow you to:

- **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.
- **Internal:** This setting allows you to define the attribute, but keep 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.
- **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'.

- **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.
- **Pre-Text / Post-Text:** 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.

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

First Name *

Noah

Last Name *

Decker

Birthday *

Mar / 10 / 2005

Gender *

Additional Options

Camp Shirt

Medium (\$10.00)

Previous

Next

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The conditional field options - in this case, the Team Color Preference 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: 4010

Source

Registrant Attribute

Internal Field

☐ Yes

Common Value

☐ Yes

Show On Wait List

☒ Yes

Name

Team Color Preference

Active

☒ Yes

Description

Male Team Colors

Categories

Field Type

Single-Select

Key

TeamColorPreference

Values

Blue, Green, Orange

Required

☐ Require a value


Show in Grid

☐ Yes

Control Type

Drop Down List

Default Value

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

Add Criteria

Form Field Filter

Show

Team Color Preference

if

All

of the following match:

Add Criteria

Gender

Gender

Equal To


Male

Save

Cancel

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 registration forms.
- 3 Add the 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. Leaving the *categories* section blank will assume the attribute be displayed at the end of the registration.

Attribute Page

Registration Attributes Id: 0

Add attribute for registrations

Name ^{*}

Active ⁱ

☒ Yes

Description

Categories

Field Type

Text

Password Field ⁱ

☐ Yes

Max Characters ⁱ

Show Character Limit Countdown ⁱ

☐ Yes

Default Value

Key ^{*}

Required

☐ Require a value

Show in Grid ⁱ

☐ Yes

Advanced Settings

Save Cancel

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

Confirmation Email

After completing the registration, you can set up a confirmation email. This email also acts as an emailed receipt.

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

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

 **Rock Solid Church**

Registration Confirmation: Summer Camp

The following registrants have been registered for Summer Camp 2015:

- **Katie Franks** - \$200.00
Additional Options:
 - Camp Shirt Small : \$10.00
- **Alexis 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 8/16/2015 (Ref #: T20150816213234104)
Balance Due: \$0.00

Looking forward to seeing you at camp this year!


If you have any questions please contact at jenny@rocksolidchurchdemo.com.

Contact Info:
3120 W Cholla St Phoenix, AZ 85029
Phone:
Email: info@rocksolidchurchdemo.com
Website: info@rocksolidchurchdemo.com

Additional text from the registration instance

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.

 **RockSolid**Church

Registration Reminder

Camp starts on August 26th. 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.

The following registrants have been registered :

- Katie Franks
- Alexis Decker
- Noah Decker

This registration has a remaining balance of \$200.00. You can complete the payment for this registration using our [online registration page](#).

If you have any questions please contact at jenny@rocksolidchurchdemo.com.

Contact Info:
3120 W Cholla St Phoenix, AZ 85029
Phone:
Email: info@rocksolidchurchdemo.com
Website: info@rocksolidchurchdemo.com

Additional text from the registration instance

Only shown if a remaining balance exists.

Again, we've provided you with a capable template (shown below). 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. There's now several tools for getting the remaining balance quickly and easily. The configuration items in this section help setup 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.

Reminder Email Settings

Payment Reminder Email

From Name

{{ RegistrationInstance.ContactPersonAlias.Pers

From Email

{{ RegistrationInstance.ContactEmail }}

Subject

{{ RegistrationInstance.Name }} Payment Reminder

Email Template

```
5 <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Payment Reminder</h1>
6
7 <p>
8   This {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm | Downcase }} for {{
9     RegistrationInstance.Name }} has a remaining balance
10   of {{ currencySymbol }}{{ Registration.BalanceDue | Format:'#,#0.00' }}. The
11   {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | Downcase | Pluralize }} for this
12   {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} are below.
13 </p>
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 %}
21   </ul>
22 {% endif %}
23
24 {% assign waitlist = Registration.Registrants | Where:'OnWaitList', true %}
```

Payment Reminder Time Span i

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

Success Title

Congratulations {{ Registration.FirstName }}

Registration Instructions

 **B** *I* S  **A**                   


Registration Confirmation Text

```
1 {% capture currencySymbol %}{{ 'Global' | Attribute:'CurrencySymbol' }}{% endcapture %}
2 {% assign registrantCount = Registration.Registrants | Size %}
3 <p>
4   You have successfully registered the following
5   {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | PluralizeForQuantity:registrantCount
6     | Downcase }}
7   for {{ RegistrationInstance.Name }}:
8 </p>
9 <ul>
10  {% for registrant in Registration.Registrants %}
11    <li>
12      <strong>{{ registrant.PersonAlias.Person.FullName }}</strong>
13      {% if registrant.Cost > 0 %}
14        - {{ currencySymbol }}{{ registrant.Cost | Format:'#,#0.00' }}
15      {% endif %}
16    </li>
17  {% endfor %}
18  {% assign feeCount = registrant.Fees | Size %}
19  {% if feeCount > 0 %}
```

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 Instance

[Home](#) > [Summer Camp](#) > Summer Camp

Summer Camp

Summer Camp

Registration

Registrant

Summer Camp

☒ Active

Registration Instructions

Additional Reminder Details

Additional Confirmation Details

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- 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 "_____"*).
- Active**
 This determines if the registration instance is currently active.
- Registration Starts**

The date and time that the registration starts.

4 Registration Ends

The date and time that the registration ends.

5 Account

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

6 Contact Name / Phone / Email

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

7 Maximum Attendees

Means how many total number of people can register for the event.

8 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.

9 Send Reminder Date

The date and time that the reminder should be sent.

10 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.

11 Additional Confirmation Details

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

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.

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)

3 Multiple Options

T-Shirt

S (\$10.00)

M (\$15.00)

L (\$20.00)

4 Multiple Options with Quantity

T-shirt

S (\$10.00)

M (\$15.00)

L (\$20.00)

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 *Event Registration* screen.

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

☒ Single ☐ Multiple

Cost

\$ 0

Maximum Available ⁶

Enable Quantity ³

☐ Yes

Is Required ¹


☐ Yes

Discount Applies ⁴

☐ Yes

Is Active ⁵

☒ Yes



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.

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".

Required Fees Options

Fee

Name *

Camp Shirt

Options

☐ Single
 ☒ Multiple

Costs

Small	\$	10.00	Max Available	✕
Medium	\$	10.00	Max Available	✕
Large	\$	10.00	Max Available	✕
X-Large	\$	10.00	Max Available	✕

+

Enable Quantity

☒ Yes

Is Required

☒ Yes

Discount Applies

☐ Yes

Is Active

☒ Yes

Save

Cancel

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

Is Required

☐ Yes

Discount Applies

☐ Yes

Is Active

☒ 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.)

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 a 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 *Event Registration* screen. Here you can add, edit and delete discounts.

Discount List

Discounts

	Code	Discount	Limits
	STAFF	50.00 %	 



Click the  button to create a new discount.

Discount Editor

Discount Code

Discount Code *

Discount Type

☒ Percentage

☐ Amount

Discount Percentage

0

%

Auto Apply Discount

☐


Maximum Usage

Maximum Registrants

Minimum Registrants

Effective Dates

to



Save

Cancel

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 1 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 *Event Registration* screen 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. 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:

- **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.
- **Discount 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 *Totals for 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.

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

Rock Solid Church

[New Here?](#) [Resources](#) [Connect](#) [Give](#) [Blog](#) [Calendar](#) [Upcoming Events](#) [Hello Alisha ▾](#)

Event Details


[Home](#) / [Calendar](#) / Summer Camp 2015

Contact
Jenny Michaels
jenny@rocksolidchurchdemo.com
(602) 555-3245

Location
Camp Humphreys - Flagstaff, AZ

Date / Time
Thursday, September 3, 2015 @ 12:00 AM

[Register](#)



Summer Camp 2015

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas pulvinar nunc magna, eu luctus orci sollicitudin ut. Duis dapibus mattis ante et vehicula. Cras enim erat, egestas vitae quam vitae, feugiat facilisis quam. Aenean quis ex malesuada, convallis lorem sit amet, porttitor metus. Morbi ipsum nisl, tristique at ipsum at, euismod tempor felis. Proin id dapibus dui. Curabitur ut tortor finibus, pharetra neque id, pharetra nisl. Proin et arcu a magna molestie rhoncus et quis nisl. Aenean quam diam, viverra eu pulvinar in, sodales vitae sapien.

Curabitur non arcu in nisl venenatis venenatis. Donec porta blandit ante ut dictum. Ut eleifend volutpat dui sed consequat. Vivamus lacus metus, hendrerit eget eros ut, pretium posuere mi.

Praesent id leo ut sem aliquam sollicitudin. Aliquam porta ut tortor non dapibus. Nulla luctus sem quis sodales egestas. Nulla luctus venenatis molestie. Suspendisse quis nulla congue, convallis est et, commodo justo. Mauris mattis porttitor tortor, nec porta lacus volutpat a. Nullam tincidunt lorem quis vestibulum scelerisque. Integer sit amet ipsum luctus, tristique nulla bibendum, tincidunt massa.

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

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

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

Version: 1.11.0

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Last Updated: 10/5/2020

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.

Registration Instance Detail Page

The screenshot shows the 'Registration Instance Detail Page' for 'Summer Camp'. The page has a sidebar with navigation icons and a main content area. The main content area shows the 'Registration Instance' details for 'Summer Camp' and a table of registrations.

Registration Instance Details:

- Name: Summer Camp
- Account: Event Registration
- Maximum Attendees: 200
- Registration Starts: 6/22/2018
- Registration Ends: 8/31/2018
- Buttons: Edit, Delete, Send Payment Reminders

Registrations Tab:

Filter Options: [Dropdown]

Registered By	Registrants	When	Total Cost	Balance Due
<input type="checkbox"/>	Decker, Ted	Alex Decker	6/13/2018 9:03 PM	\$100.00

50 500 5,000 1 Registration

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

Registration

Home > Summer Camp > Summer Camp > Registration

Summer Camp

Summer Camp

Ted Decker

Registrant

Registration Details 1

Registered By

Ted Decker

Confirmation Email

alisha.marble@rocksolidchurchdemo.com

Resend Confirmation

Discount Code

STAFF

Discount Percentage

50 %

Cost Summary

Description	Amount	Discounted Amount
Alex Decker	\$ 200.00	\$ 100.00
Camp Shirt (1 @ \$0.00)	\$ 0.00	\$ 0.00
Total	\$ 200.00	\$ 100.00

Total Cost

\$100.00

Paid

\$0.00

Amount Remaining

\$100.00

3 View/Edit Payments

4 Audit Log

5

Edit

Delete

Alex Decker

2 Birthdate

2/28/2008

Gender

Female

Leader Preference

Alisha Marble

Cabin Preference

Bears

Count

One

CountDown

Ten

Cost

\$200.00

Discounted Cost

\$100.00

Camp Shirt

\$0.00

Edit

Delete

6 + Add New Registrant

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- Registration Details**
 This shows the details of the registration including information on the Registrar. You can easily resend the confirmation email from here.
- Registrant Details**
 Next you will see a panel for each registrant on the registration. You can also edit their registration details from this screen.

Version: 1.11.0

46 of 104

Last Updated: 10/5/2020

3 View Edit Payments

This link allows you to view and edit payments. 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! You can however only move the event to an instance using 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 this 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

Registrants

Home > Summer Camp > Summer Camp 2020

Summer Camp

Summer Camp 2020

Registration

Registrant

Summer Camp 2020

Summer Camp

Name

Summer Camp 2020

Default Payment Amount

Account

Event Registration

Registration Starts

3/2/2020

Registration Ends

6/1/2020

Edit

Delete

Registrations

Registrants

Payments

Fees

Discounts

Linkages

Wait List

Busses

Cabins

Activities

Registrants

Filter Options

☐ Registrant

☐ Decker, Alex

Group

Fees

Camp Shirt (\$10.00)

Placements

50

500

5,000

1 Registrant

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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 these tabs opens a financial transaction for the payment. From this transaction detail screen you can process a refund for the payment.

Version: 1.11.0

48 of 104

Last Updated: 10/5/2020

Registration Payments

Registration Instance

Home > Summer Camp > Summer Camp

Summer Camp

Summer Camp

Registration

Registrant

Summer Camp

Name
Summer Camp

Maximum Attendees
200

Registration Starts
6/22/2018

Account
Event Registration

Registration Ends
8/31/2018

Edit

Delete

Send Payment Reminders

Registrations

Registrants

Payments

Fees

Discounts

Linkages

Payments

Filter Options

Person	Date / Time	Amount	Payment Method	Account	Transaction Code	Registrar	Registrant(s)
Decker, Ted	6/13/2018 9:18:12 PM	\$100.00	Credit Card	*****4444	T20180613211812193	Ted Decker	Alex Decker

50

500

5,000

1 Payment







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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.

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.

Registration Instance Registrants



Registration Instance
[Home](#) > [Summer Camp](#) > [Summer Camp](#)

Summer Camp

Summer Camp

Registration

Registrant

Summer Camp

Name
Summer Camp

Maximum Attendees
200

Registration Starts
6/22/2018

Account
Event Registration

Registration Ends
8/31/2018

Edit Delete

Send Payment Reminders

Registrations

Registrants

Payments

Fees

Discounts

Linkages

Linkages

Filter Options

Calendar Item	Campus	Group	Content Item	Public Name	URL Slug
	All Campuses			Summer Camp	

50 500 5,000 1 Linkage

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Wait List Tab

This tab displays any registrants placed on the wait list as well as 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

Search ▾

Wait List

[Home](#) > [Summer Camp](#) > [Summer Camp 2020](#)

Summer Camp

Summer Camp 2020

Registration

Registrant

📅 Summer Camp 2020
Summer Camp
☆

Name Summer Camp 2020	Default Payment Amount
Maximum Attendees 1	Account Event Registration
Registration Starts 3/2/2020	Registration Ends 6/1/2020

Edit
Delete

[Registrations](#)
[Registrants](#)
[Payments](#)
[Fees](#)
[Discounts](#)
[Linkages](#)
Wait List
[Busses](#)
[Cabins](#)
[Activities](#)

🕒 Wait List
Filter Options ▾

<input type="checkbox"/>	Wait List Order	Wait List Individual	Added Datetime
<input type="checkbox"/>	1	Decker, Noah	3/3/2020 10:55:48 PM

1 Wait List Individual







Move From Wait List

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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](#) section to learn more.

Registration Group Placement



Placement Groups
[Home](#) > [Event Registration](#) > [Summer Camp 2020](#)


Summer Camp

Summer Camp 2020

Registration

Registrant

Search



Summer Camp 2020

Summer Camp

Name
Summer Camp 2020

Default Payment Amount

Account
Event Registration

Registration Starts
3/2/2020

Registration Ends
6/1/2020

Edit Delete

Registrations

Registrants

Payments

Fees

Discounts

Linkages

Wait List

Busses

Cabins

Activities

Groups

Add Group

Registrants

Search

Brian Jones

Maddie Lowe

Bus 1

Shared

Members

Noah Decker

Alex Decker

Bus 2

Shared

Members

Jordan Greggs

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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

Rock Solid Church

New Here?ResourcesConnectGiveBlogCalendarWatchHello Alisha ▾

Summer Camp

[Home](#) / [Calendar](#) / Summer Camp

Registration Full
This Registration has reached it's capacity. Complete the registration below to be added to the waitlist.

How many registrants will you be registering?

-

1

+

Next

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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.

Wait List Warning (Partial)

Rock Solid Church

New Here?ResourcesConnectGiveBlogCalendarWatchHello Alisha ▾

Summer Camp

[Home](#) / [Calendar](#) / Summer Camp

Registration Full
This registration only has capacity for 1 more registrant. The first registrant you add will be registered for Summer Camp 2016. The remaining registrant will be added to the waitlist.

How many registrants will you be registering?

-2+

Next

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

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

Rock Solid Church

New Here?ResourcesConnectGiveBlogCalendarWatchHello Alisha ▾

Summer Camp

[Home](#) / [Calendar](#) / Summer Camp

First Registrant

This registrant will be fully registered.

First Name *

Jen

Last Name *

Fish

Birthday *

Apr ▾ / 16 ▾ / 2000 ▾

Gender *

Female ▾

Leader Preference *

Cindy Decker

Cabin Preference *

Eagle

Food Allergies

Additional Options

Camp Shirt

Previous

Next

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

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

Rock Solid Church

[New Here?](#) [Resources](#) [Connect](#) [Give](#) [Blog](#) [Calendar](#) [Watch](#) [Hello Alisha ▾](#)

Summer Camp

[Home](#) / [Calendar](#) / [Summer Camp](#)

Second Registrant

This registrant will be on the waiting list

Individual is in the same family as *

☐ Jen Fish

☒ None of the above

First Name *

Lynn

Last Name *

Sykes

Birthday *

Jun ▾

/

18 ▾

/

2000 ▾

Gender *

Female ▾

Previous

Next

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

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.

Summer Camp

[Home](#) / [Calendar](#) / Summer Camp

Review Registration

This Registration Was Completed By

First Name *

Alisha

Last Name *

Marble

Send Confirmation Emails To *

alish@rocksolidchurchdemo.com

Alisha is in the same family as *

☐ Jen Fish☐ Lynn Sykes☒ None☒ Should Your Account Be Updated To Use This Email Address?

Payment Summary

Discount Code

Apply

Description

Amount

Jen Fish

\$ 200.00

Lynn Sykes (Waiting List) *

\$ 0.00

Total

\$ 200.00

Total Cost

\$200.00

Minimum Due Today

\$100.00

Amount To Pay Today *

\$

200.00

Amount Remaining

\$0.00

Payment Method

Credit Card #

VISA

MasterCard

American Express

Discover

Expiration Date

/

Card Security Code

Previous

Finish

Powered by: [Rock RMS](#)

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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

[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 11/17 (Acct #: *****1111, Ref #: T20161117111516883)

Balance Due: \$0.00

A confirmation email has been sent to alish@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

Powered by: [Rock RMS](#)

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RockSolid Church

Registration Confirmation: Summer Camp

The following registrant has been registered for Summer Camp:

- **Jen Fish** - \$200.00

The following registrant has been added to the wait list for Summer Camp:

- **Lynn Sykes**

Total Cost: \$200.00

Paid \$200.00 on 11/17 (Acct #: *****1111, Ref #: T20161117111516883)

Balance Due: \$0.00

Looking forward to seeing you at camp this year!

If you have any questions please contact Jenny Michaels at
jenny@rocksolidchurchdemo.com.

Contact Info:

3120 W Cholla St Phoenix, AZ 85029

Phone:

Email: info@organizationname.com

Website: www.organization.com

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

Search

Registrations

Home > Event Registration > Summer Camp 2020

Summer Camp
 Summer Camp 2020
 Registration
 Registrant

Summer Camp 2020
 Summer Camp

Name
Summer Camp 2020

Maximum Attendees
5

Registration Starts
3/2/2020

Default Payment Amount

Account
Event Registration

Registration Ends
6/1/2020

Edit
Delete
Send Payment Reminders

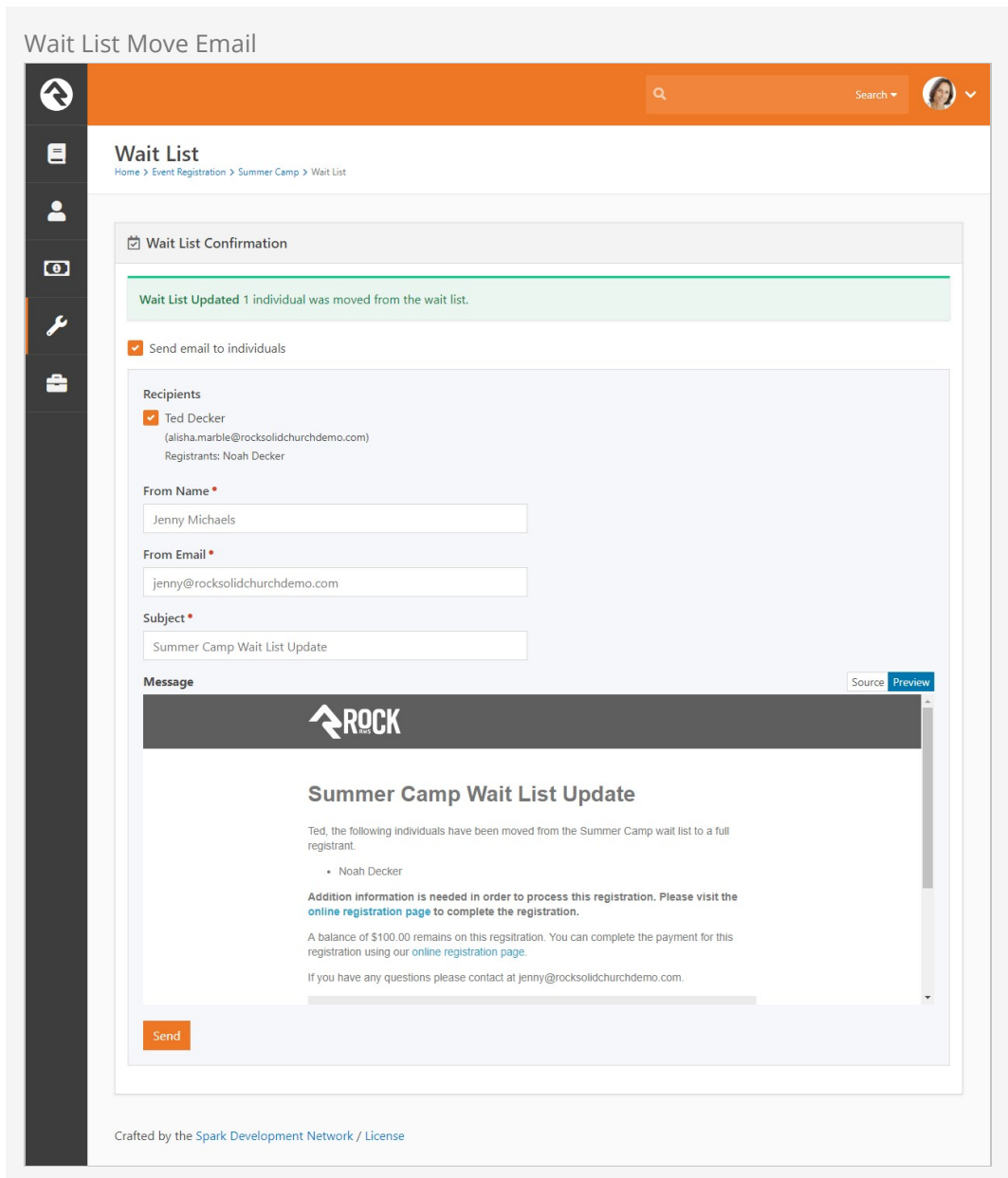
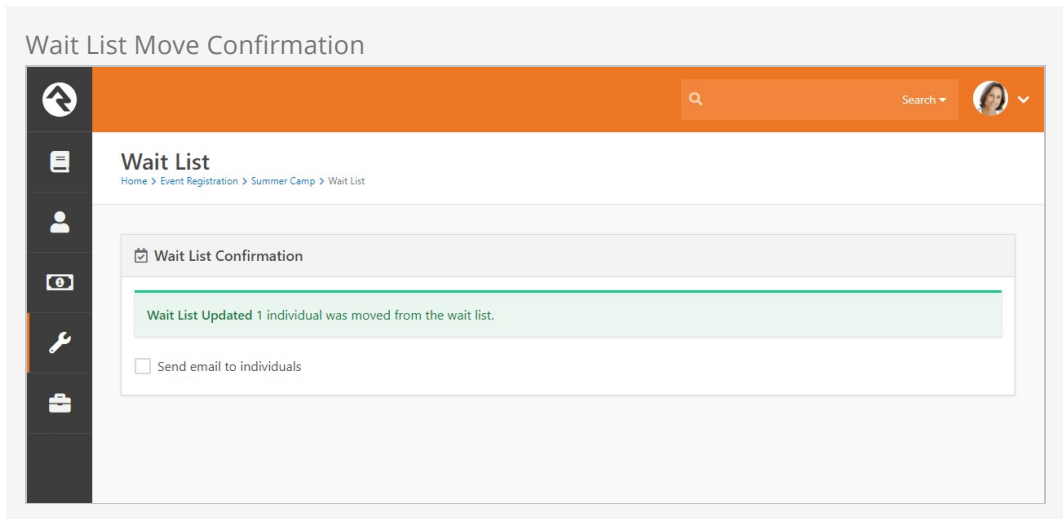
Registrations
Registrants
Payments
Fees
Discounts
Linkages
Wait List
Busses
Cabins
Activities

Registrations

Filter Options

<input type="checkbox"/>	Registered By	Registrants	When	Total Cost	Balance Due	
<input type="checkbox"/>	Greggs, Bob	Tim Greggs	3/4/2020 3:28 PM	\$0.00	\$0.00	
<input type="checkbox"/>	Greggs, Bob	Jordan Greggs	3/3/2020 11:09 PM	\$210.00	\$210.00	
<input type="checkbox"/>	Lowe, Crain	Maddie Lowe	3/3/2020 11:08 PM	\$210.00	\$210.00	

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.



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.

Rock provides several tools to allow you to easily receive the amount owed. 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.

Registrations

Home > Event Registration > Summer Camp 2020

Summer Camp Summer Camp 2020 Registration Registrant

Summer Camp 2020

Name: Summer Camp 2020 Default Payment Amount

Maximum Attendees: 5 Account: Event Registration

Registration Starts: 3/2/2020 Registration Ends: 6/1/2020

Edit Delete Send Payment Reminders

Registrations Registrants Payments Fees Discounts Linkages Wait List Busses Cabins Activities

Registrations

Filter Options

Registered By	Registrants	When	Total Cost	Balance Due
<input type="checkbox"/> Lowe, Craig	Maddie Lowe	3/3/2020 11:08 PM	\$210.00	\$210.00
<input type="checkbox"/> Jones, Ben	Brian Jones	3/3/2020 11:07 PM	\$210.00	\$210.00
<input type="checkbox"/> Greggs, Bob	Jordan Greggs	3/3/2020 11:09 PM	\$210.00	\$210.00
<input type="checkbox"/> Greggs, Bob	Tim Greggs	3/4/2020 3:28 PM	\$0.00	\$0.00
<input type="checkbox"/> Decker, Ted	Alex Decker	3/3/2020 10:33 PM	\$10.00	\$0.00

Once you click the [Send Payment Reminder](#) link you'll see the page below. This page allows you to customize the reminder text and who should receive the email.

Payment Reminders
Home > Event Registration > Summer Camp > Payment Reminders

Send Payment Reminders

1 From Name *
Jenny Michaels

From Email *
jenny@rocksolidchurchdemo.com

Subject *
Summer Camp Payment Reminder

3 **Message** Source Preview

2 **Registration Payment Reminder**

This registration for Summer Camp has a remaining balance of \$100.00. The registrants for this Registration are below.

- Alex Decker
- Noah Decker

You can complete the payment for this registration using our [online registration page](#).

If you have any questions please contact at jenny@rocksolidchurchdemo.com.

Contact Info:
3120 W Cholla St Phoenix, AZ 85029-4113

Outstanding Balances
Below is a list of registrations with outstanding balances. Individuals who have not been reminded of their balance in 14 days have been pre-selected. Those who have been recently added or notified of their balance are greyed out. They can be still be included by either selecting them or selecting all transactions.

<input type="checkbox"/>	Name	Date Registered	Email	Last Reminder Sent	Cost	Amount Paid	Balance Due
<input type="checkbox"/>	Decker, Ted	6/13/2018	alisha.marble@rocksolidchurchdemo.com	Today	\$400.00	\$100.00	\$100.00

4 **Send Reminders** **5**

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1 From Name

The "from" name and email as well as the 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 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.

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.

The screenshot shows the 'Registration Template Placement Configuration' interface. It features a dark sidebar on the left with icons for navigation. The main content area has an orange header with a search bar and a user profile icon. Below the header, there are several sections: 'Discounts', 'Placement Configuration', 'Terms/Text', and a 'Show Communication Settings' checkbox. The 'Placement Configuration' section contains a table with columns for 'Placement Name', 'Group Type', 'Shared Groups', and 'Allow Multiple'. The table lists three items: 'Busses', 'Cabins', and 'Activities'. Each item has a 'Shared Groups' column with specific group names and an 'Allow Multiple' column with a boolean value. There are also edit and delete icons for each row.

Placement Name	Group Type	Shared Groups	Allow Multiple
Busses	General Group	Bus 1 and Bus 2	False
Cabins	General Group		False
Activities	General Group	Swimming, Golfing and Hiking	True

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.

1 Name

2 Group Type

3 Icon CSS Class

4 Allow Multiple

5 Shared Groups

Group

Golfing

Hiking

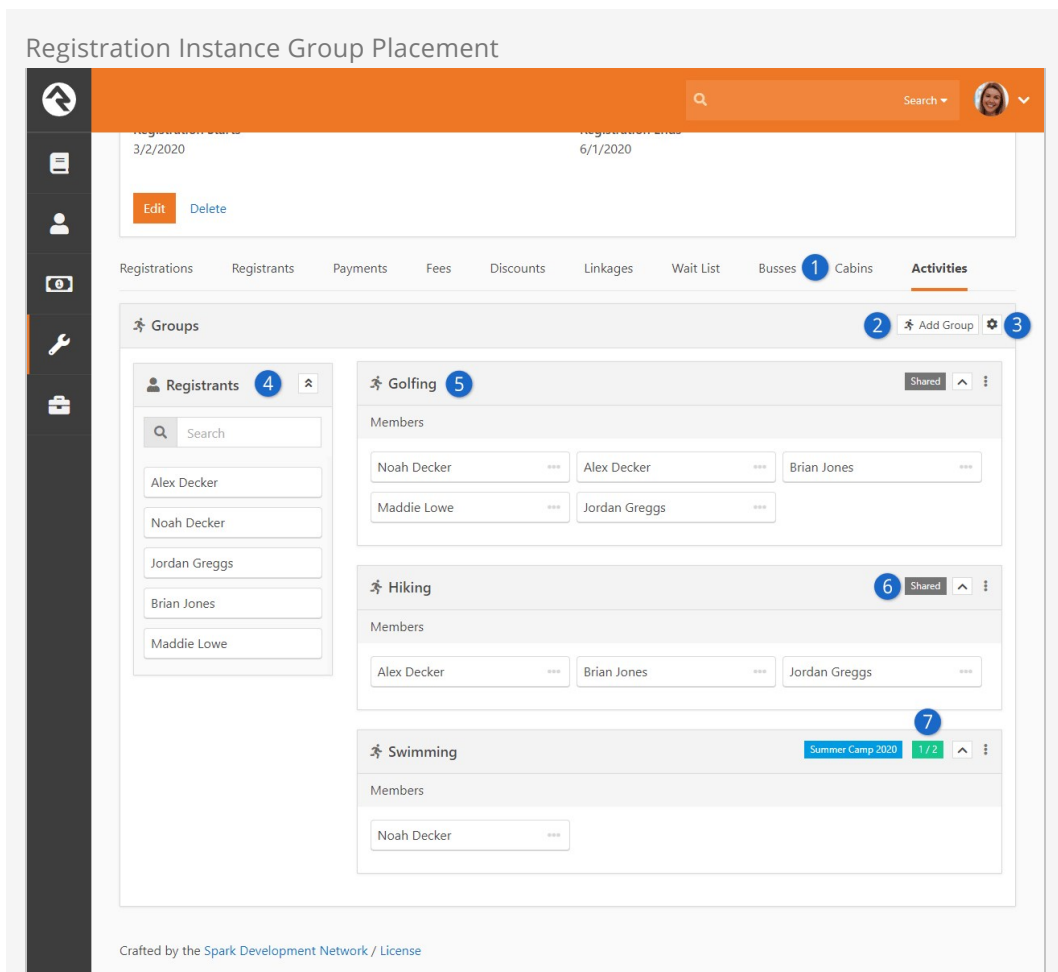
Swimming

Save Cancel

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- 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.



1 Placements

In the example pictured above, there are three 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.

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 two registrants (it's a very small pool) with one space already taken by Noah Decker's placement.

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.

Placement Configuration

Registrant Configuration

1 Highlight Genders ☐

2 Show Fees ☐

3 Displayed Registrant Attributes

4 Filters

Fee Filters

Fee

Person Filters

Show if Any All of these are False True

Add Filter Group Add Filter

5 Group Configuration

Displayed Group Attributes

Hide Full Groups ☐

Displayed Group Member Attributes

Save Cancel

1 Highlight Genders

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

2 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.

3 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.

4 Filters

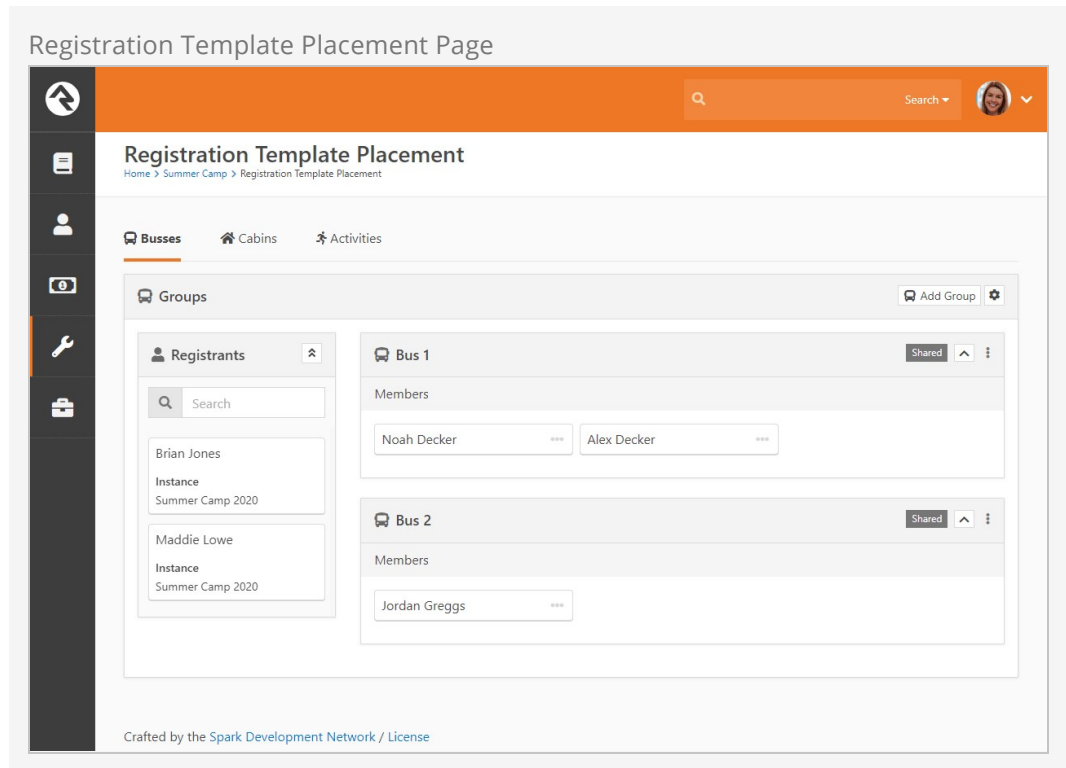
You can restrict the list of registrants by adding filters here. In the example pictured above, filters can be added according to registrant attributes or fees. You can also add a person filter to, for example, filter by age or grade.


5 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.

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.



This page can be accessed from the registration template detail page by clicking the  icon as pictured below.

Event Registration

Home > Summer Camp

Summer Camp

Instance

Registration

Registrant

Add Category

Registration Template

Connection

General

Summer Camp

General

Group Type

General Group

Cost

\$200.00

Registrant Forms (1)

Minimum Initial Payment

\$0.00

Fees

Camp Shirt

Small-\$10.00, Medium-\$10.00, Large-\$10.00, X-Large-\$10.00

Description

Edit

Delete

Summer Camp Instances

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.

The screenshot displays the 'Registration Payments' interface. At the top, there's a navigation bar with a search icon and a user profile. Below this, a breadcrumb trail reads: Home > Event Registration > Summer Camp 2020 > Registration. A progress bar shows four steps: Summer Camp, Summer Camp 2020, Ted Decker (current), and Registrant. The main content area is titled 'Registration Details' and includes a 'Resend Confirmation' button. It also shows 'Registered By: Ted Decker' and 'Confirmation Email: ted@rocksolidchurchdemo.com'. On the right, there's a 'Discount Code' section with 'DISCOUNT' and a 'Discount Percentage' of '50 %'. Below this, there are tabs for 'Account', 'Fees', and 'Payments'. The 'Payments' tab is active, showing a 'Total Cost' of '\$100.00', 'Paid' of '\$50.00', and 'Amount Remaining' of '\$50.00'. At the bottom, there are 'Edit' and 'Delete' buttons, and an 'Audit Log' link.

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

Registration Details

Registered By
Ted Decker

Confirmation Email
ted@rocksolidchurchdemo.com

Resend Confirmation

Discount Code
DISCOUNT

Discount Percentage
50 %

Account

Fees

Payments

Payments

Date / Time	Details	Amount
3/3/2020 8:14 PM	Decker, Theodore Credit Card *****4444 T20200303201452895	\$50.00

Process New Payment

Add Manual Payment

Edit

Delete

Audit Log

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 payment through Rock.

3

Add Manual Payment
This optional allows you to enter the details of a manual (off-line) payment.

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.

Search

Transaction Detail

Home > Transactions > Transaction Detail

Financial Transaction

Batch #1482 Event Registration

Authorized Person Information

Person	Campus
Ted Decker	Main Campus

Addresses

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Date/Time

6/13/2018 9:18 PM

Accounts

Event Registration	\$100.00
Total	\$100.00

Batch

SummerCamps_ Credit Card

Source

On-Site Collection

Transaction Code

T20180613211812193

Payment Gateway

TestGateway

Payment Method

Type: Credit Card
Account Number: *****4444
Expires: 10/2030

Registration

Summer Camp - Summer Camp

Updates

Created by Alisha Admin on 6/13/2018 at 9:18 PM
Last Modified by Alisha Admin on 6/13/2018 at 9:18 PM

Edit

Refund

Transaction History

Date Created: 6/13/2018

Filter Options

Category	Who	Did	What	When
Transaction	Alisha Admin	Added Event Registration [4] value of \$100.00.		56 Minutes Ago

Clicking the Refund button will show the refund modal below.

Payments Edit Panel

Refund

Amount ¹

\$ 100.00

Reason ²

Summary ³

⁴

☒ Process refund through financial gateway

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 > General 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 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.

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 lists any recent registrations 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.


Recent Registration Block

Rock Solid Church Demo

[New Here?](#)
[Resources](#)
[Connect](#)
[Give](#)
[Blog](#)
[Calendar](#)
[Watch](#)
[Hello Ted ▾](#)

My Account

[Home](#) / [My Account](#)



Ted Decker

49 yrs old (1/1/1970)
Male
Married 18 yrs (1/4)

ted@rocksolidchurchdemo.com

Home Address
3120 W Cholla St
Phoenix, AZ 85029-4113

Update

Account Info

Change Password

Groups

Ushers (Member)
Decker Group (Leader *)

Schedule Toolbox

Assessments

DISC
Completed: 2/2/2013
[View Results](#) [Retake Assessment](#)

Update

Spiritual Gifts
Available
[Start Assessment](#)

Update

Conflict Profile
Available
[Start Assessment](#)

Update

Emotional Intelligence
Available
[Start Assessment](#)

Update

Motivators
Available
[Start Assessment](#)

Recent Registrations

Pancakes and Parables Morning Camp 1

Decker Family



Cindy Decker

38 yrs old (3/10/1981)
Female
Married 18 yrs (1/4)

cindy@fakeinbox.com

Update



Noah Decker

17 yrs old (12/19/2001)
Male
Single
6th Grade

Update



Alex Decker

8 yrs old (2/10/2011)
Female
Single
3rd Grade

Update

Add New Family Member

Request Additional Changes

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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?ResourcesConnectGiveBlogCalendarWatchHello Ted ▾

Registration


Home / Calendar / 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



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).

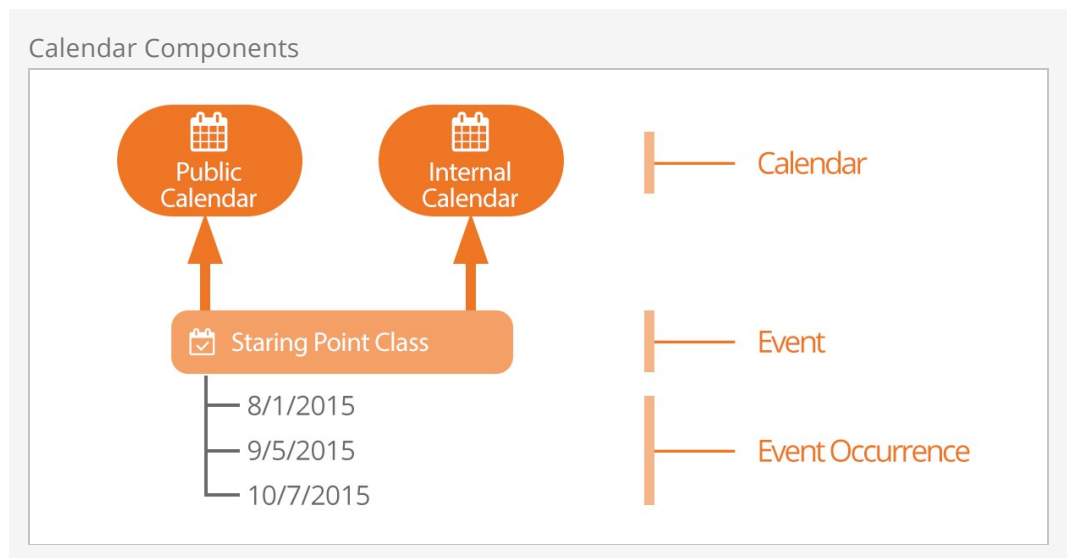
Individuals who have already paid in full will not be able to enter a discount code after registering. Similarly, individuals who have already used a discount code can't apply an

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.

Calendars

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



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

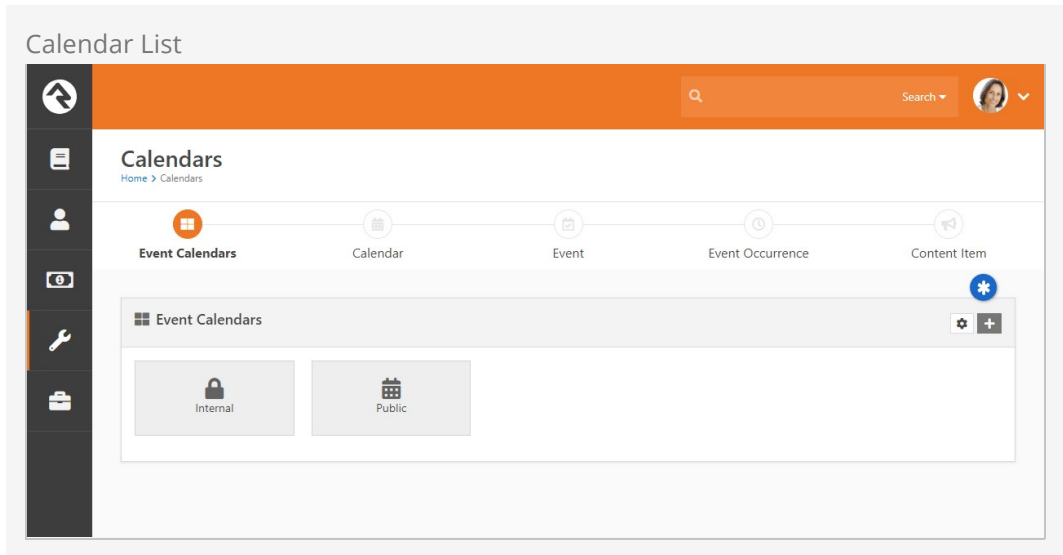
Every organization has the need for multiple calendars. Even a small organization will have a public and private (internal) calendar. Most will have several more. You can administrate calendars under [Tools > Calendars](#).

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.




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

Calendar Details

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

Search ▾

↶

Event Detail

[Home](#) > [Calendars](#) > [Calendars](#) > Rock Solid Finances Class

Event Calendars

Calendars

Rock Solid Finances Class

Event Occurrence

Content Item

📅 Rock Solid Finances Class
Active Approved ☆

Name 1

Active 2

☒

Approved 3

☒

Approved at 9:36 AM on 6/26/2015 by Alisha Marble.

Summary 4

Description 5

⌨ B I S ↻ 🗑️ 🔍 ⌵ ☰ ☷ 📎 📄 📁 📧 🔄 ↺

Duis vel massa egestas, cursus odio vestibulum, pulvinar felis. Quisque mattis enim nec libero euismod venenatis id nec arcu. Donec quis lectus leo. Nullam nec enim a massa placerat fermentum. Pellentesque dolor turpis, imperdiet nec nisl sed, ultricies condimentum sapien. Proin facilisis quam diam, quis varius risus aliquam eu. Suspendisse sed neque interdum nulla egestas molestie eget sed est. Mauris sed eros in neque scelerisque consequat. Ut commodo semper pharetra.

Audiences

All Church 6	✕
Men	✕
Women	✕
Adults	✕

+

Photo 7

✕

Upload

Calendars 8
+

☒ Calendars
 ☒ Internal

Details URL ⓘ 9

Event Attribute Values

10

Calendars

Twitter Photo ⓘ

Facebook Photo ⓘ

11

Event Occurrence Attributes

Attribute	Description	Field Type	Required	Show in Grid	Allow Search
No Event Occurrence Attributes Found					

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- 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

Event Occurrence
Home > Calendars > Public > Rock Solid Finances Class > Event Occurrence

Event Calendars Public Rock Solid Finances Class All Campuses Content Item

Edit Event Occurrence

Campus 1
All

Contact 2
Alisha Admin

Location Description 3

Schedule 4
Edit Schedule
Once at 1/29/2016 12:47 AM

Registration Instance - Group 5
Add New Registration Instance Use Existing Registration Instance

Occurrence Note 6

Save Cancel

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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 Registration Instance / Group

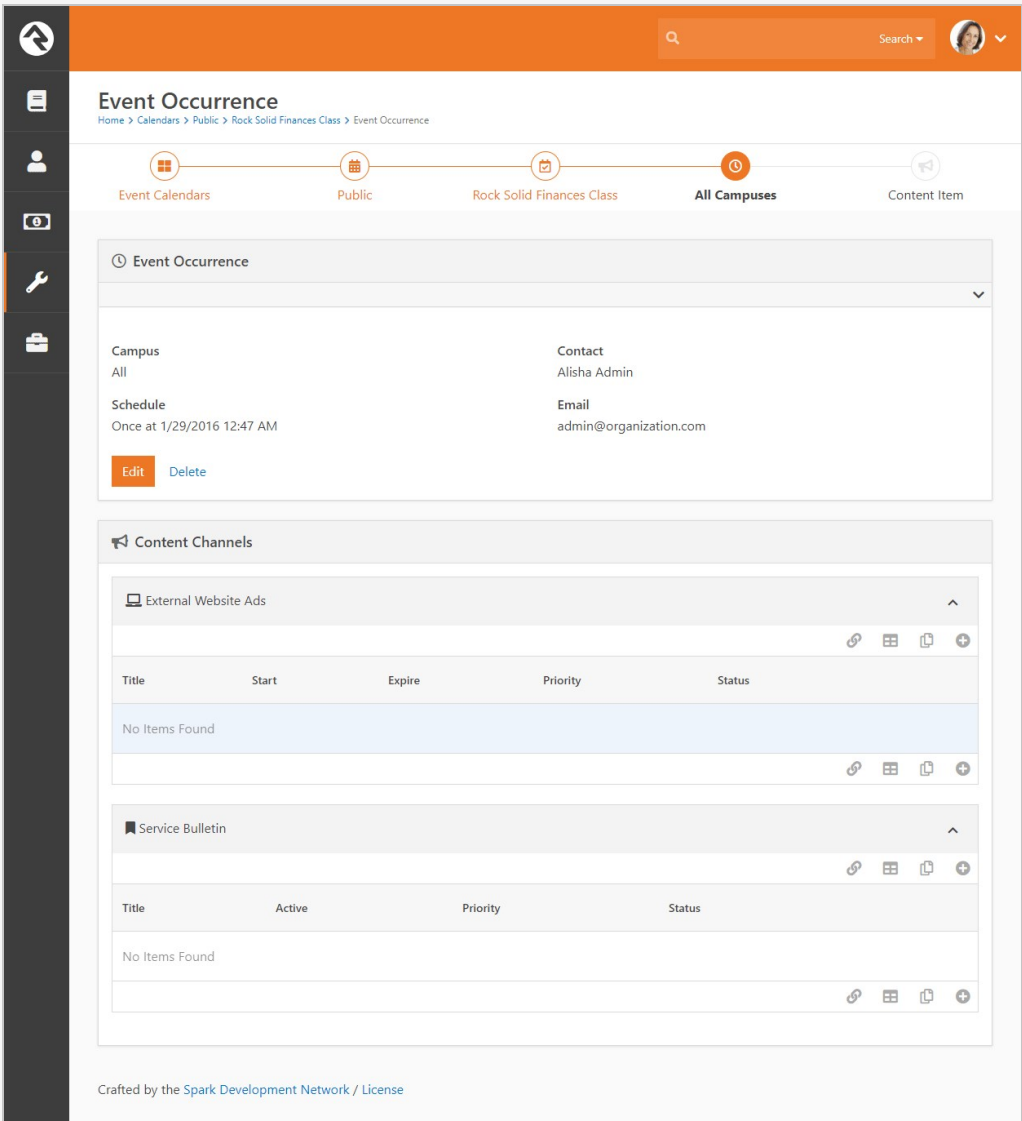
Most often, you'll want to create a registration for your calendar event. Instead of having to leave the screen to create the registration instance, you can do it right here. We'll talk more about how to do this in the *Bringing It All Together* chapter.

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

Home > Calendars > Public > Rock Solid Finances Class > Event Occurrence

Event Calendars Public Rock Solid Finances Class All Campuses Content Item

Event Occurrence

Campus
All

Schedule
Once at 1/29/2016 12:47 AM

Contact
Alisha Admin

Email
admin@organization.com

Edit Delete

Content Channels

External Website Ads

Title	Start	Expire	Priority	Status
No Items Found				

Service Bulletin


Title	Active	Priority	Status
No Items Found			

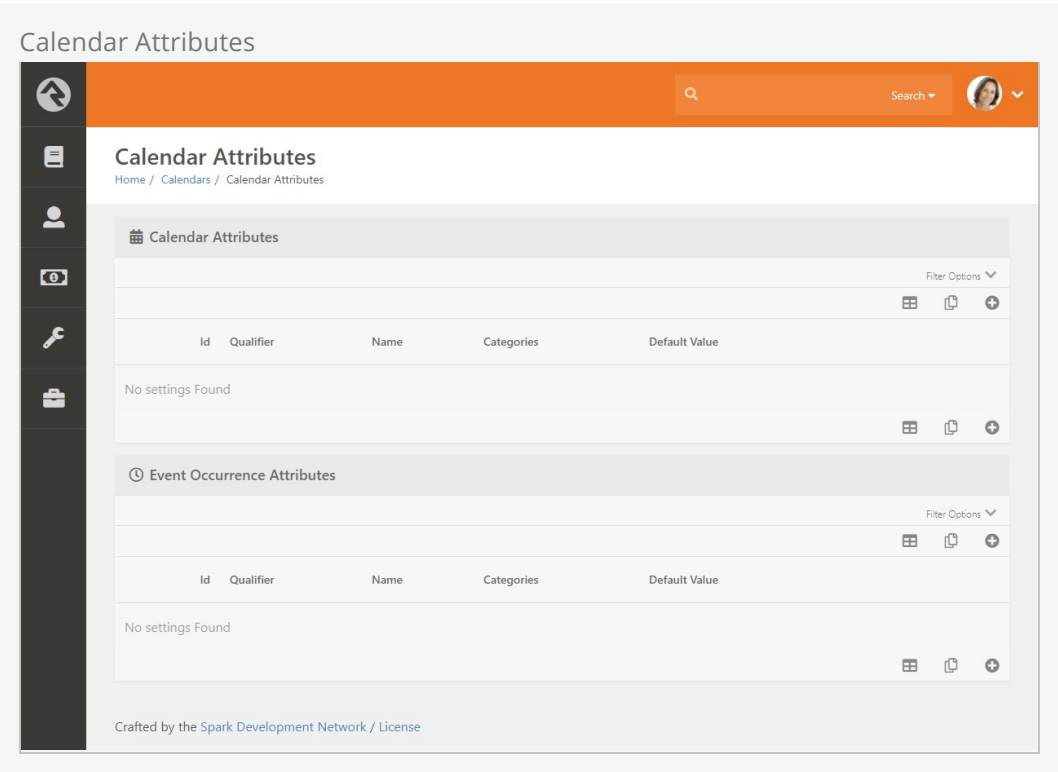
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Event Occurrence Attributes

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.



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

Event Attribute Values

Event Occurrence Attributes

Attribute	Description	Field Type	Required	Show in Grid	Allow Search
☰ Lunch Provided?		Boolean			✎ ✕
+					

Save

Cancel

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

Rock Solid Church

[New Here?](#)
[Resources](#)
[Connect](#)
[Give](#)
[Blog](#)
[Calendar](#)

Hello Alisha ▾

Calendar

[Home](#) / [Calendar](#)

< October 2015 >

S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Week Month

Rock Solid Finances Class

View Details >

Date	Time	Location	Summary
10/28/2015	10:47 PM	All Campuses	

Warrior Youth Event

View Details >

Date	Time	Location	Summary
10/30/2015	10:47 PM	All Campuses	

Customs & Classics Car Show

View Details >

Date	Time	Location	Summary
10/31/2015	10:47 PM	All Campuses	

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Event Detail Block

Rock Solid Church

[New Here?](#)

[Resources](#)

[Connect](#)

[Give](#)

[Blog](#)

[Calendar](#)

Hello Alisha ▾

Event Details

[Home](#) / [Calendar](#) / Rock Solid Finances Class

Contact

admin@organization.com

Date / Time

Wednesday, October 28, 2015 @ 10:47 PM

[Register](#)



Rock Solid Finances Class

Duis vel massa egestas, cursus odio vestibulum, pulvinar felis. Quisque mattis enim nec libero euismod veneratis id nec arcu. Donec quis lectus leo. Nullam nec enim a massa placerat fermentum. Pellentesque dolor turpis, imperdiet nec nisi sed, ultricies condimentum sapien. Proin facilisis quam diam, quis varius risus aliquam eu. Suspendisse sed neque interdum nulla egestas molestie eget sed est. Mauris sed eros in neque scelerisque consequat. Ut commodo semper pharetra.

Powered by: [Rock RMS](#)

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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 > General Settings > Defined Types > Lava Templates](#).)

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

Calendar URL

The format of the URL has a specific format:

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

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

There are three parts to the URL: the organization's domain name (i.e., rocksolidchurch.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://RockSolidChurch.org/GetEventCalendarFeed.ashx?calendarid=1&startDate=20180401&enddate=20180707
```

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

```
http://RockSolidChurch.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.

Calendar Components

Event Calendar

Home > Calendars > Public

Event Calendars

Public

Event

Event Occurrence

Content Item

Public

Export Calendar Feed

A calendar for public events that the church hosts and promotes.

Edit

Delete

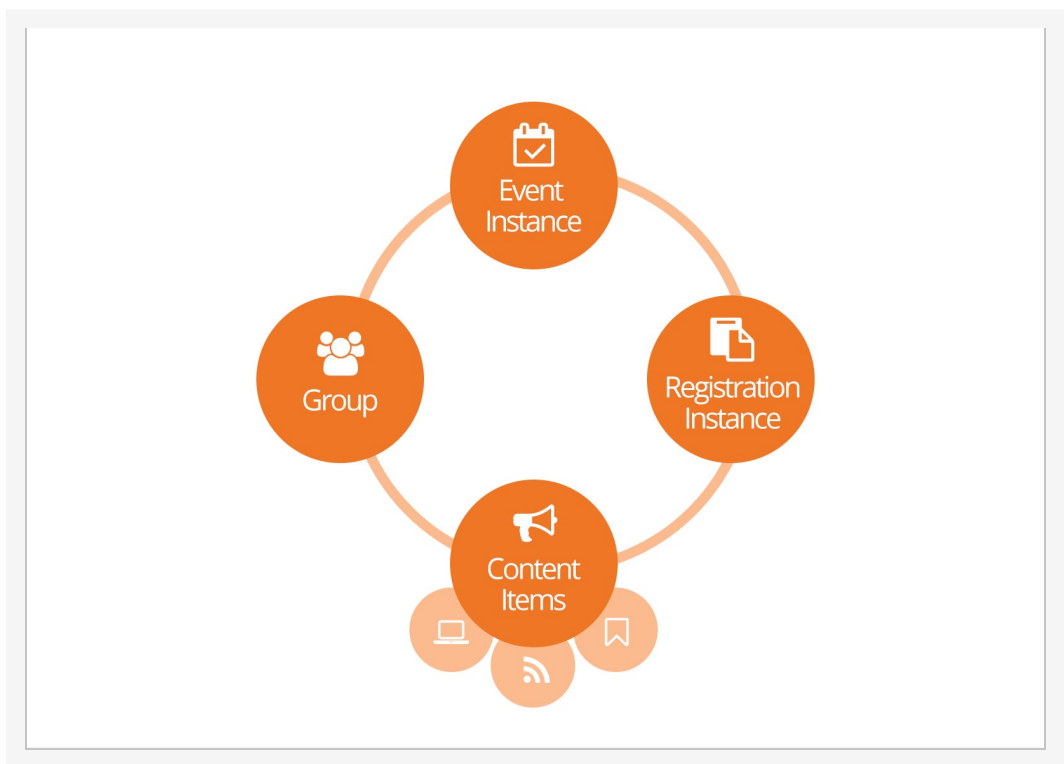
Event Items

Filter Options

Name	Next Start Date	Calendars	Audiences	Occurrences	Status	Approval Status
Customs & Classics Car Show	N/A	Public Internal	All Church Men Adults	1	Active	Approved

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. While editing your occurrence select the `Add New Registration Instance` button. This will allow you to create and link a registration instance right to your event. You'll notice that this screen is the same one from the registration details, except that it has a few extra fields.

1. **Registration Template:** We can choose which registration template we

would like to use for the event. Doing this does assume that a registration template is already available for you to use for your event. If not you'll need to do that first.

2. **Group:** From this screen you'll also be able to link the group you created in step #1.
3. **URL Slug:** 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/SummerCamp2015* instead. In most cases the slug can be whatever you want, but try to use only letters and numbers (e.g. SummerCamp2015) if possible because some special characters may cause issues with certain browsers.
3. After saving the occurrence, you can enter any content channel items you need for your event.

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 registrants be automatically placed into the correct group.

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.

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.

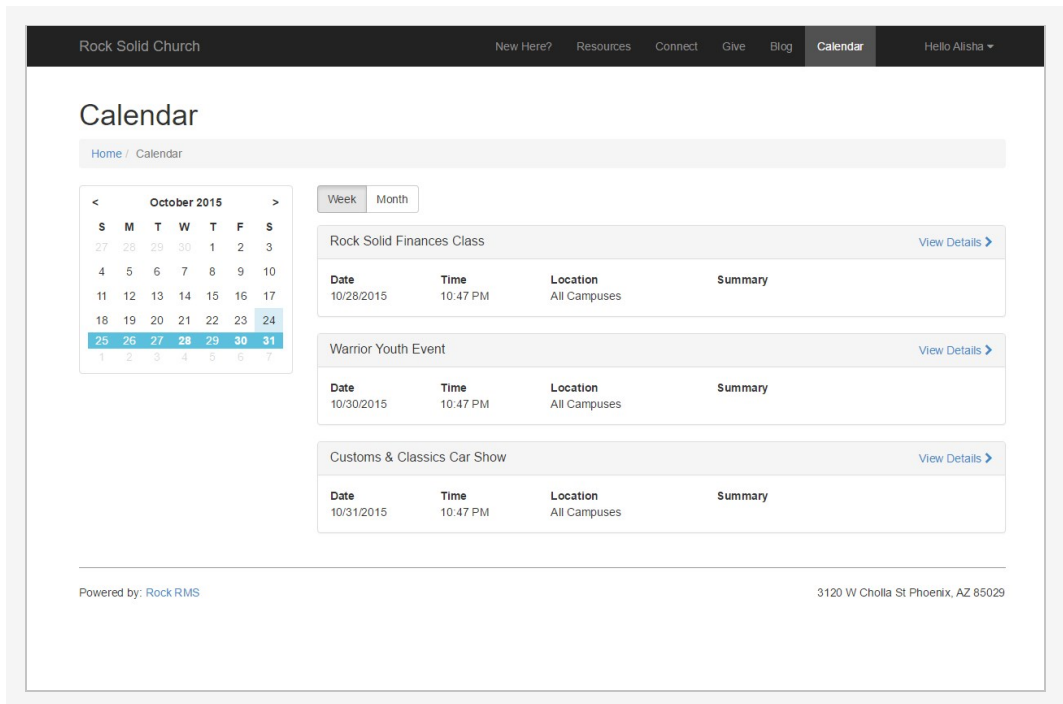
See our [Designing and Building Websites Using Rock](#) guide for more information on blocks in general.

Calendar Block

This 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 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 Content:** 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.

- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.



Event Item Occurrence Detail

Once you pick an event from the calendar, this is the block that displays the details for the event occurrence. This page is formatted entirely using Lava, so customize at will.

- **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.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.
- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.

Rock Solid Church

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Hello Alisha ▾

Event Details

[Home](#) / [Calendar](#) / [Rock Solid Finances Class](#)

Contact

admin@organization.com

Date / Time

Wednesday, October 28, 2015 @ 10:47 PM

Register

67,228,111

13,946,511

6,504,606

1,960,477

7,736,223

5,825,769

35,973,586

31,254,586

41%

ROCK SOLID

FINANCIAL

Rock Solid Finances Class

Duis vel massa egestas, cursus odio vestibulum, pulvinar felis. Quisque mattis enim nec libero euismod venenatis id nec arcu. Donec quis lectus leo. Nullam nec enim a massa placerat fermentum. Pellentesque dolor turpis, imperdiet nec nisi sed, ultricies condimentum sapien. Proin facilisis quam diam, quis varius risus aliquam eu. Suspendisse sed neque interdum nulla egestas molestie eget sed est. Mauris sed eros in neque scelerisque consequat. Ut commodo semper pharetra.

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

Event Item Occurrence List

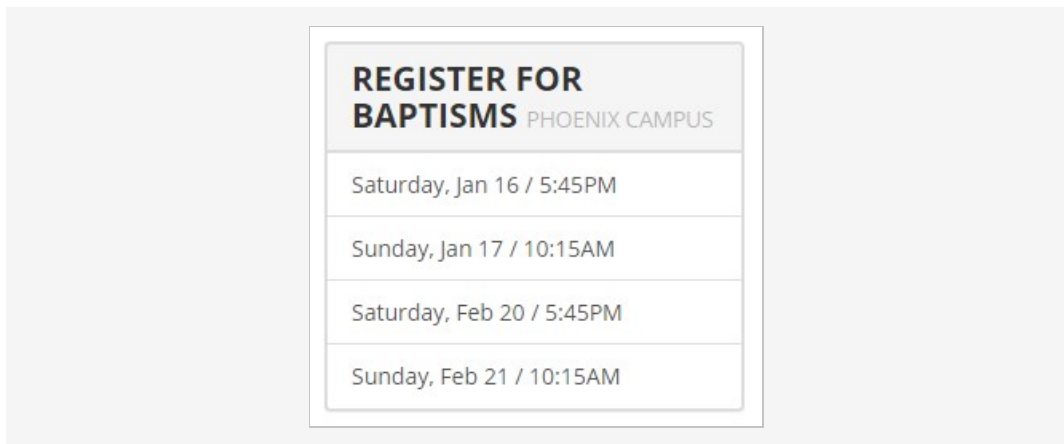
This is more of a specialty block. It lists upcoming occurrences for a specific event item. This is helpful for events like specific classes (e.g. Starting Point, Stewardship Class) or events that routinely happen (e.g. Baptisms).

- **Event Item:** The event item to show occurrences for.
- **Campuses:** Which campuses to show occurrences for.
- **Use Campus Content:** 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.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.
- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.

Version: 1.11.0

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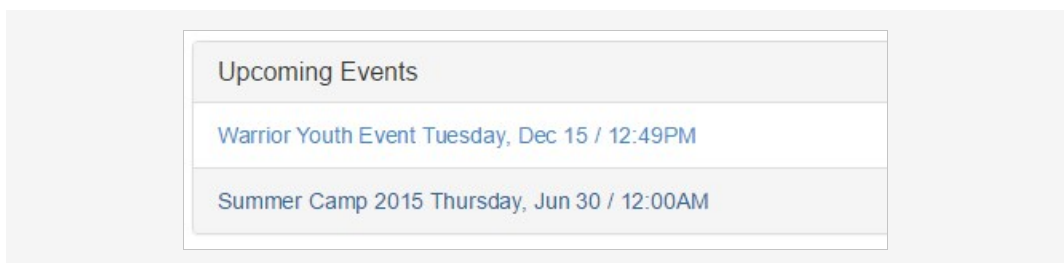
Last Updated: 10/5/2020



Calendar Item Occurrence List By Audience

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.

- **Audience:** The audience to filter on.
- **Calendar:** Which calendar to use.
- **Use Campus Content:** 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.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.
- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.



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.

Find Starting Point

[Home](#) > [Person Profile](#) > [Find Starting Point](#)

Starting Point Registration

Campus
Main Campus

Select An Upcoming Starting Point

☒

9/5/2018 (Wednesday)
Location: Building 4000 Start Time: 6:30 PM
Contact: Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus

☐

9/9/2018 (Sunday)
Location: Building 4000 Start Time: 10:30 AM
Contact: Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus

☐

9/12/2018 (Wednesday)
Location: Building 4000 Start Time: 6:30 PM
Contact: Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus

☐

9/16/2018 (Sunday)
Location: Building 4000 Start Time: 10:30 AM
Contact: Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus

Register

☒ Ted Decker

☐ Noah Decker

☐ Cindy Decker

☐ Alex Decker

Email Reminder Address

Start Registration

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