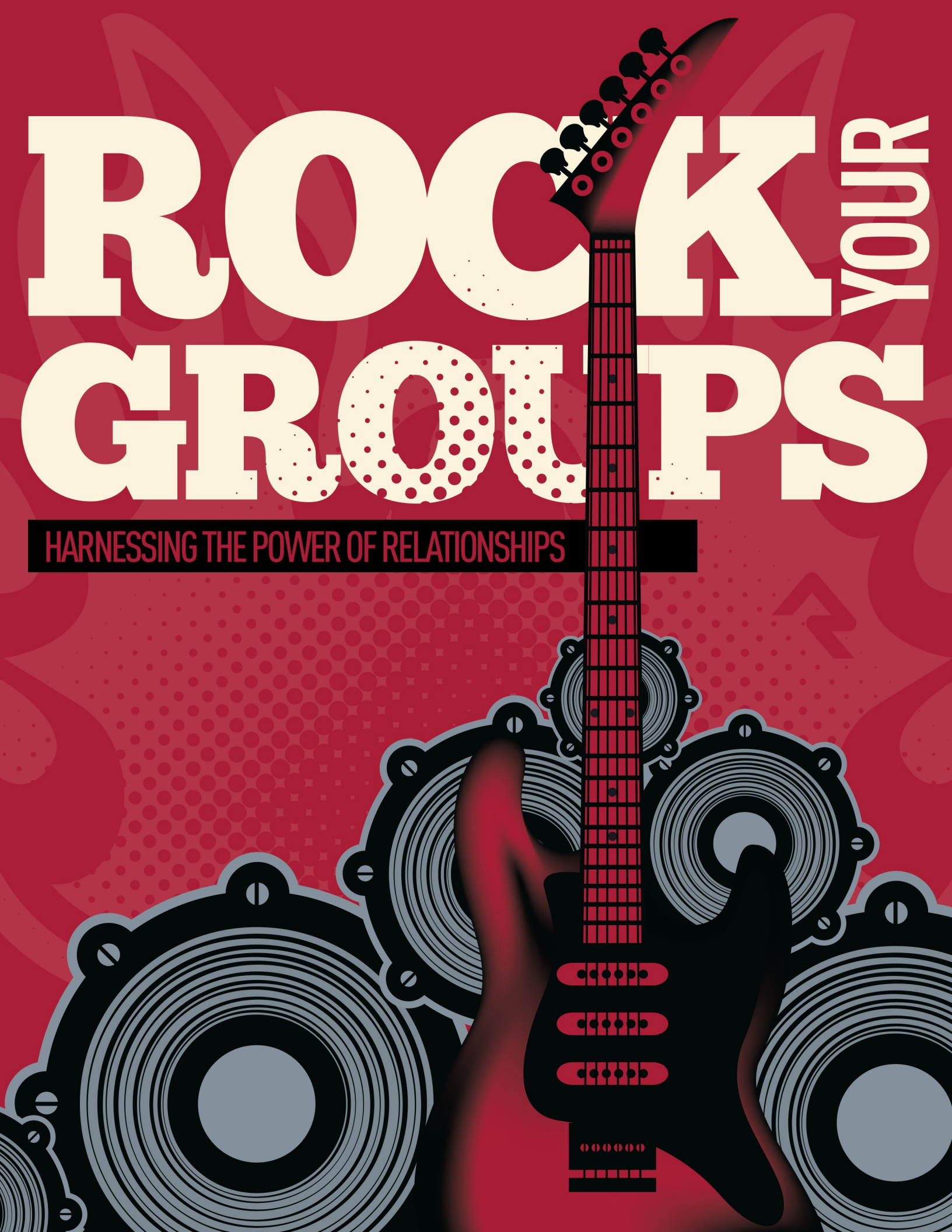


# ROCK YOUR GROUPS

HARNESSING THE POWER OF RELATIONSHIPS



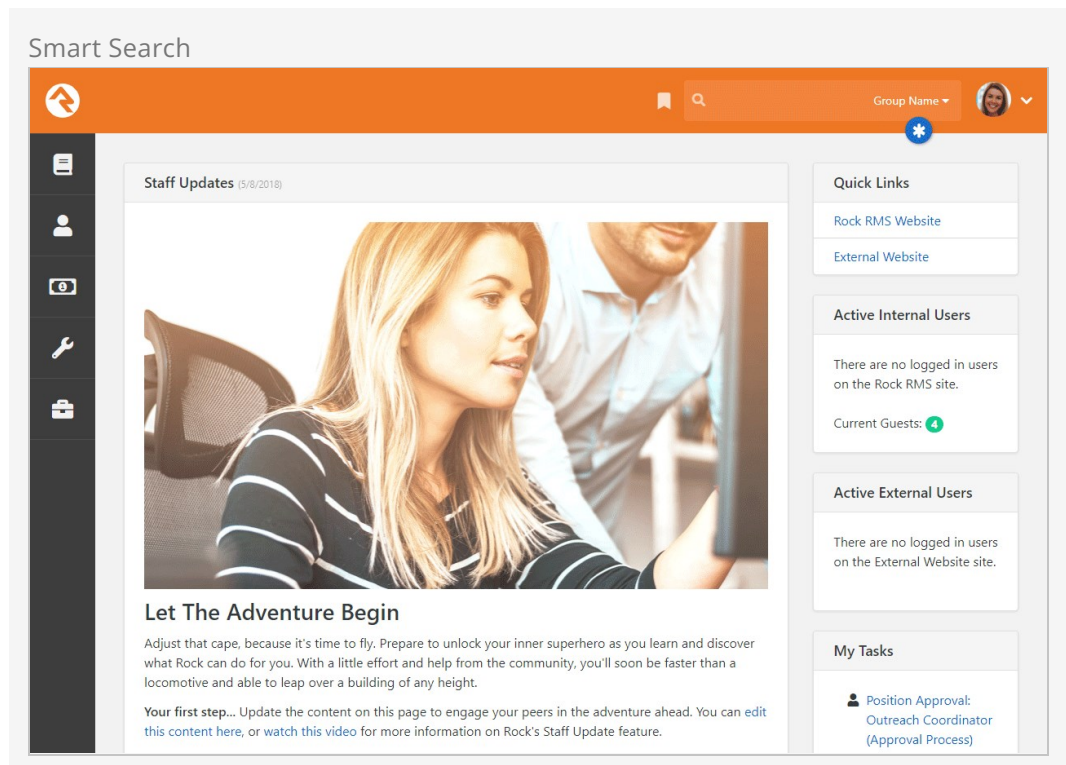
# Overview

Groups are used whenever two or more are gathered. You'll find groups to be simple but incredibly powerful. Rock comes pre-configured with several types of groups, including:

- **Families:** Each family is stored as a group. This is incredibly powerful because families get the same power and functionality as any other Group Type. In the beginning you'll want to leave families configured just the way you found them. As you create new Group Types and gain more experience with groups, keep in mind that you can add new attributes and additional functionality to the family Group Type.
- **Security Roles:** These groups help secure Rock data. While you'll use these groups a majority of the time for security, you'll soon discover that any group in Rock can act as a security role.
- **Check-in Groups:** Rock's check-in features use groups to store the locations where kids can check in, and to track attendance.
- **Serving Teams:** While we have big ideas for how serving teams will work in the future, we have configured a simple group type to get you started with tracking your groups.
- **General Groups:** It's likely that you'll be creating several groups that don't warrant their own specific Group Type. In these cases, feel free to create them as 'General Groups'.
- **Application Groups:** Rock needs to keep track of various lists of people. For instance, people who have opted out of getting future photo requests. These 'lists of people' are stored as Application Groups. Application groups can be viewed/managed under `Admin Tools > System Settings > Application Groups`.
- **Small Groups:** We've added a generic Small Group group type. Feel free to use this as a base to build from if your church has a groups ministry.
- **Small Group Sections:** This group type works in conjunction with the Small Group type and acts as a leadership level to provide hierarchy for your groups. Again, feel free to use this type as a launching point for getting started.

# Searching for Groups

As you add more and more groups to Rock, it may be tedious to locate a specific group. Never fear, you can use the [Smart Search](#) at the top of each page to help find the specific group you are looking for.



Be sure to choose the *Group Name* option from the drop down and then enter the group name you are searching for. You don't need to enter the full group name, since the search will return any group that has the search term you entered. Say you were looking for the Bible Study group that Ted Decker leads (named "Ted Decker's Bible Study Group"). Any of the searches below would be valid, although some may return several other groups in the results, as well.

Decker  
Bible Study  
Ted Deck

If the search term you provide only matches a single group, you will be taken directly to that group. However, if several groups match, you will have to select one from the list of

groups provided.

# Group Viewer

The *Group Viewer* page can be accessed by navigating to `People > Group Viewer`. This is the primary page for viewing and editing groups. Below, we will discuss each section of the group viewer in detail.

The screenshot shows the Group Viewer interface. On the left is a sidebar with navigation icons. The main area is titled 'Group Viewer' and shows a hierarchy of groups. A group named 'Decker Group' is selected, showing its details: 'Small group with Ted as the group leader.', 'Parent Group: Section A', 'Schedule: Monday at 7:00 PM', and 'Topic: Book of Genesis'. A map shows the meeting location at 11624 N 31st Dr Phoenix, AZ 85029-3202. Below the map are 'Edit' and 'Delete' buttons. At the bottom, a 'Group Members' table lists four members: Ted Decker (Leader, Active), Cindy Decker (Member, Active), Alisha Marble (Member, Active), and Bill Marble (Member, Active).

Name	Role	Member Status
<input type="checkbox"/> Ted Decker	Leader	Active
<input type="checkbox"/> Cindy Decker	Member	Active
<input type="checkbox"/> Alisha Marble	Member	Active
<input type="checkbox"/> Bill Marble	Member	Active

## 1 Group Tree

This control allows you to drill down through your group hierarchies. You'll want to plan your hierarchies to achieve a good balanced approach. Too deep of a hierarchy will lead to too many clicks to drill down. However,

if your hierarchy is too broad, then you will have to scan through long lists of groups to find the one you want.

## 2 Group Details

Displays information about the group including adding tags.

## 3 Group Labels & Following

Clicking the Group Type label will take you directly to that Group Type's page. Also, the *Campus* displays here if one has been assigned. To the right, you can follow the group by clicking the star icon.

## 4 Action Bar

There are options to edit, archive or delete a group. Whether you see `Delete` or `Archive` depends on Group History being enabled at the Group Type level. If Group History is enabled but the `Archive` button doesn't appear, run the *Process Group History* job.

## 5 Group Maps

The viewer will display maps for each group location that is able to be mapped. You can click on the map to see a larger interactive map. You can also click on the map marker button directly below the map to see the interactive map.

## 6 Actions

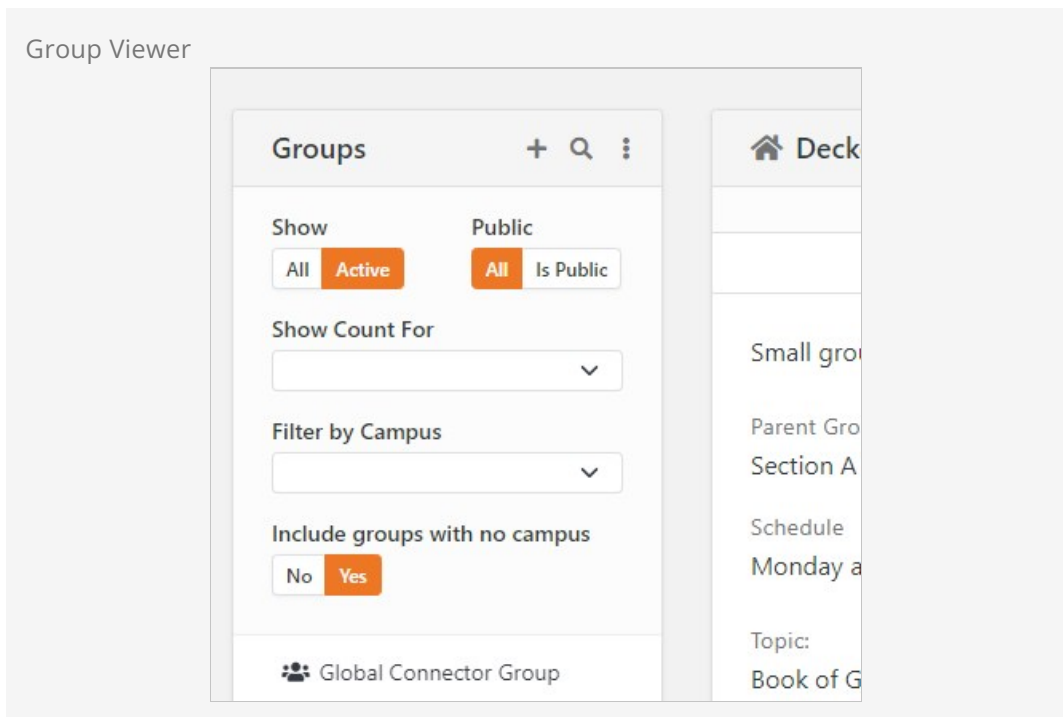
Below the maps you'll find buttons for a few key actions.

- Takes you to the group *RSVP List* page (see Group RSVP).
- Takes you to the *Group History* page (see Group History).
- Allows you to manually enter attendance for the group.
- 📍 Takes to you an interactive map where you can view all the people who are members of the group.
- If enabled in the block's settings, this will create a copy of the group. The list of what gets copied is displayed before proceeding.
- 🔒 Using the security button, you can control who has access to view and edit this specific group. See the *Securing Groups* section below for more information on how you can secure your groups.

## 7 Group Members

List of members inside the group. See the Group Members chapter for more information.

The group view has a couple of other interesting features you should be aware of. Notice the icons at the top of the "Groups" (Group Tree) block in the figure above. You can click the **+** icon to add a new group, or the **Q** icon to search for a group. Clicking the **⋮** icon will show you several advanced features in the tree view. Let's open it up and see what's inside:



You'll notice:

- **Show:** This determines if inactive groups should be shown.
- **Public:** This determines if only groups marked 'Is Public' should be shown.
- **Show Count For:** The tree can also display counts of the number of members in the group, or the number of child groups a group has.
- **Filter by Campus:** This lets you narrow down the groups according to a campus you select.
- **Include Groups With No Campus:** If this is set to No then only groups with a campus will be shown.

### Archived Groups

You can Archive a group instead of deleting it. Archiving removes the group from the Group Viewer and other places where groups can be seen but allows you to restore it later. When a group has been marked as Archived and you want to bring it back go to [Admin Tools > General Settings > Archived Groups](#) and click on the  icon to unarchive the group.

Note: If a group type has 'Enable Group History' checked, once the 'Process Group History' job runs the 'Archive' button will be enabled on a group.

## Group Maps

Clicking the map marker button will take you to an interactive group map showing the members of the group. Depending on the configuration of the group other features may be enabled.

If the group has a geopoint (determined through the address geocoding process or by

selecting the point on the map) the location of the group will also be present on the map.

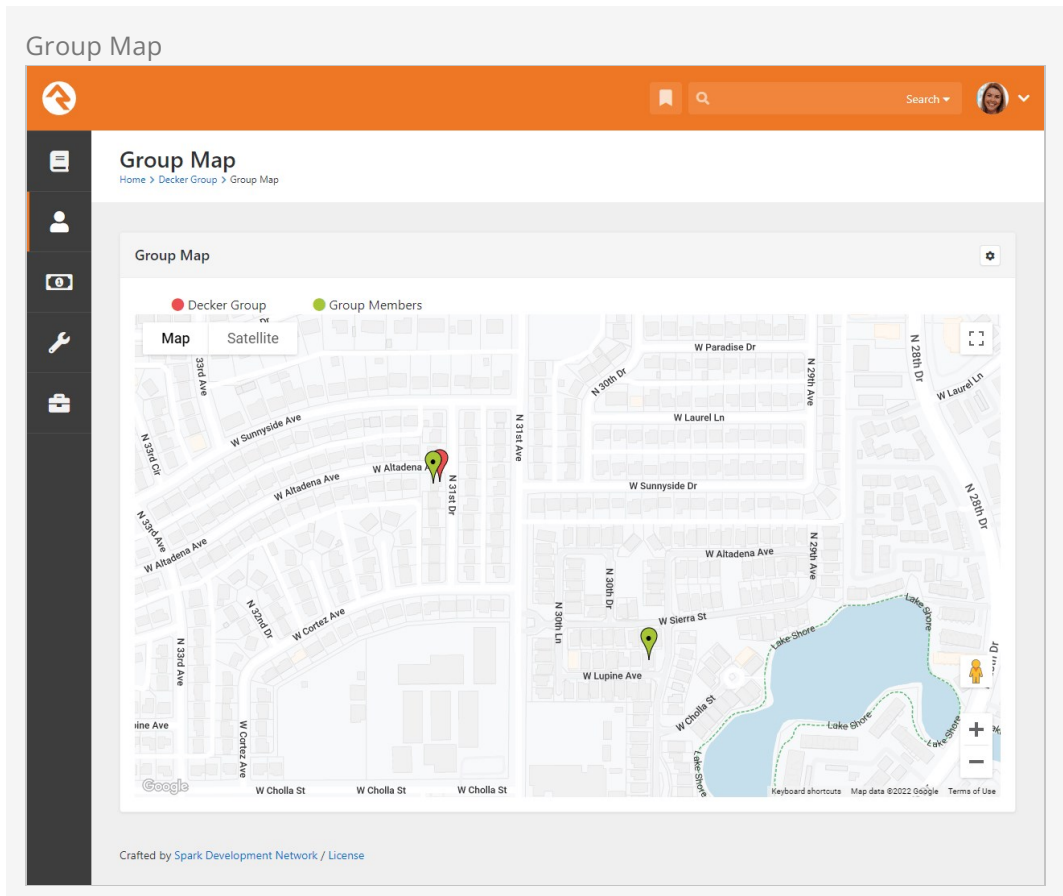
If the group has a defined geofence this fence will be shown on the map. The presence of the geofence will also enable the display of connection status labels at the top of the map. Clicking these labels will show everyone with that connection status in the database who lives within the geofence. This allows you to view possible 'prospect' group members.

### Limiting The Display of Certain Connection Statuses

In order for a connection status to be displayed as a label, the status must be configured with a 'Color' attribute. This helps determine the pin color for the map marker as well as acts as a global setting to help determine which connection statuses should be mapped. You can set the color for a connection status under

Admin Tools > General Settings > Defined Types > Connection Status .

Along the top of the block, you can click the labels (e.g., *Decker Group* or *Group Members*) to toggle the display of the group's location or member locations. In the example pictured below we're displaying the location of the *Decker Group* and we clicked the *Group Members* label (with the green circle) to show the locations of individual members.





## Adding a Group

You can add a new group to the tree by clicking the **+** icon and then selecting the location from the list. Adding a group using *Add Top-Level* will place the group at the root or top of the tree. Selecting **Add Child to Selected** will place the group under the currently selected group.

### Note

If you have a group selected but **Add Child to Selected** is disabled, then this group type does not allow child groups. See the *Group Types* section below for more on group hierarchies.

The screenshot shows the 'Adding a Group' interface within a 'Group Viewer' application. The interface is divided into several sections:

- Header:** An orange bar at the top with a home icon, a search icon, and a user profile icon labeled 'Group Name'.
- Left Sidebar:** A dark sidebar with icons for home, user, groups, settings, and a briefcase. The 'Groups' section is expanded, showing a tree view with items like 'Global Connector Group', 'Section A', 'Section B', 'Serving Teams', 'Ushers', and 'General Groups'.
- Main Content Area:**
  - Add Group Form:** A form titled 'Add Group' with a star icon. It includes:
    - Name:** A text input field.
    - Active:** A checkbox that is checked.
    - Public:** A checkbox that is checked.
    - Description:** A large text area.
    - General Section:** A section with a dropdown arrow containing:
      - Group Type:** A dropdown menu set to 'General Group'.
      - Security Role:** A checkbox labeled 'Yes' that is unchecked.
      - Campus:** A dropdown menu.
      - Parent Group:** A dropdown menu set to 'General Groups'.
      - Require Signed Document:** A dropdown menu.
    - Meeting Details:** A section with a dropdown arrow.
    - Buttons:** 'Save' and 'Cancel' buttons at the bottom.
  - Footer:** A small text line at the bottom left: 'Crafted by the Spark Development Network / License'.

## Group Details

The group details section displays all of the information about the group. The group type and campus (if configured) will be shown as labels in the banner at the top. A map of the group's location will also be shown, if configured.

## Editing a Group

Clicking the **Edit** button from the detail section will allow you to edit information about the group and provide additional configuration settings.

The key features of the edit screen are discussed below.

Editing a Group

Group Viewer  
Home > ASU Student Group

Groups + Q

- Global Connector Group
- Section A
- Section B
  - ASU Student Group
  - Gilbert Group
  - Greggs Group
  - Marble Group
- Serving Teams
- Ushers
- General Groups

ASU Student Group Small Group

1 Name ASU Student Group 2 Active 3 Public

4 Description We hang out and study the bible in an informal way.

General

5 Group Type Small Group 8 Security Role  Yes 9 Campus Main Campus

6 Parent Group Section B 10 Require Signed Document

7 Administrator

11 Meeting Details

Scheduling

12 Group Attribute Values

13 Member Attributes

Group Requirements

14 Group Member Workflows

Save Cancel

Crafted by the Spark Development Network / License

**1 Name**

Update this field to change the name of the group.

**2 Active**

You can inactivate the group by deselecting this checkbox. See [Inactivating a Group](#) for additional details.

**3 Public**

Only groups that are marked as Public can be viewed in the Group Finder.

**4 Description**

Providing a good description for the group lets people know what the

group is all about.

#### 5 **Group Type**

Changing the group type of an existing group is possible, but it does have some consequences. All group attribute data for the group will be lost if the group type is changed.

#### 6 **Parent Group**

Changing this will move the group to a new parent in the hierarchy. Removing a parent group will move the group to the root or top of the tree.

#### 7 **Administrator**

Select the individual who is responsible for administrating the group. This will only appear if *Show Administrator* is enabled for the group type, and may be labeled differently (e.g., Coordinator, Director) if an *Administrator Term* has been configured. Group administrators don't have the security privileges of Leaders, and they aren't members of the group. Generally, this is only used for internal purposes to identify who is responsible for the group from an organizational perspective without having to add that individual to the group as a member.

#### 8 **Security Role**

This option will enable the group to operate as a security role. The members of the group will be granted access to whatever privileges the group is granted.

#### 9 **Campus**

Providing an optional campus will link the group to a specific campus. This isn't shown if you have only one campus.

#### 10 **Require Signed Document**

This setting is only used if you have a legacy signature provider in place. If you're using a legacy signature provider like SignNow, you'll need to transition to the native electronic signature features in Rock soon. In a future release the *Require Signed Document* setting for groups will be going away entirely. For details on electronic signatures in Rock check out the [Admin Hero Guide](#).

#### 11 **Meeting Details**

This area allows you to add locations and times based on the configuration provided through the group type.

#### 12 **Group Attribute Values**

Any group attributes values added by the group type will be available here for editing.

#### 13 **Member Attributes**

In this area, you can configure attributes to be assigned to each member of the group. These attributes will be available for editing when adding or editing group members.

#### 14 **Group Member Workflows**

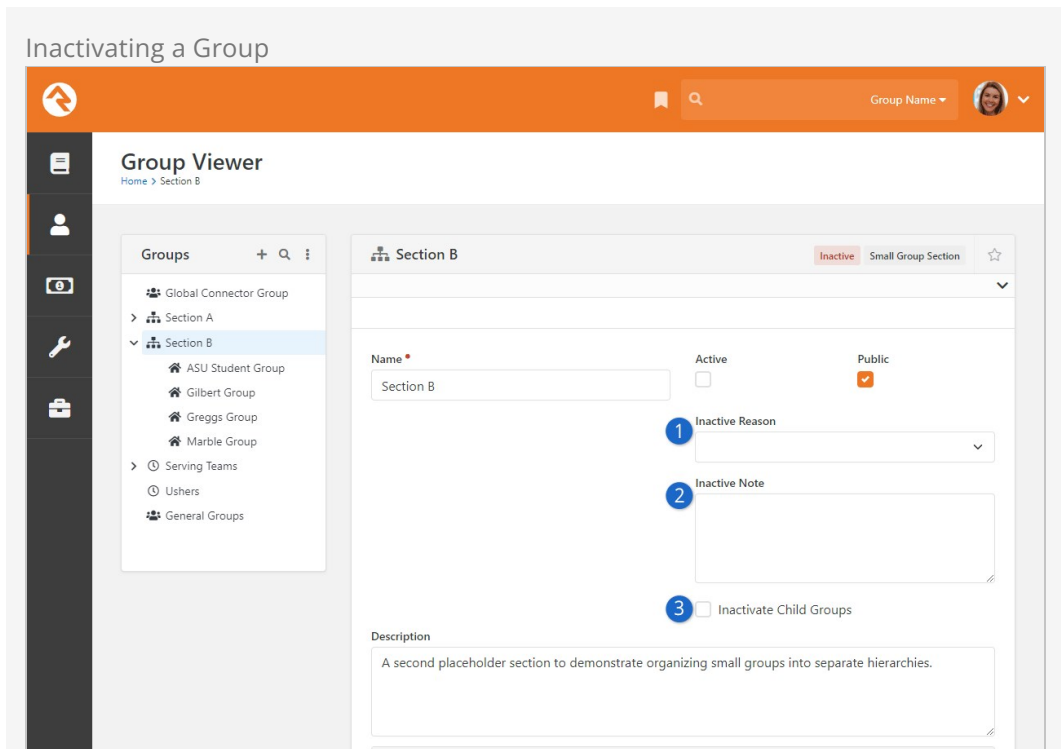
This section allows you to configure workflows that will be launched when specific events occur with group members.

## More Information Below

You may notice that we skipped over a few sections above. Additional information on these areas is provided in later chapters of this guide.

### Inactivating a Group

If enabled in the Group Type settings, you'll be prompted to provide additional details after inactivating a group.



#### 1 Inactive Reason

Select a reason for inactivating the group. Depending on the Group Type settings, the Inactive Reason may be optional or required.

#### 2 Inactive Note

Additional details can be recorded here for future reference. For instance, you might indicate why the group was made Inactive. Notes are optional, even if a reason is required.

#### 3 Inactivate Child Groups

If there are child groups, you can choose whether to inactivate them also. You'll be given this option any time an inactivated group has child groups.

The list of Inactive Reasons is maintained under [Admin Tools > General Settings > Defined Types > Inactive Group Reasons](#). You can restrict which Group Types the reason can be applied to. If no Group Types are selected, the reason can be used with groups of any type.

# Inactive Group Reasons Defined Type

### Defined Value Id: 790

Edit defined value for Inactive Group Reasons

**Value \***  
Lack of Attendance

**Description**

Active

**Group Type Filter**

<input type="checkbox"/> Acme Certificates	<input type="checkbox"/> Check-in Test Area	<input type="checkbox"/> Jr High Area	<input type="checkbox"/> Services
<input type="checkbox"/> Application Group	<input type="checkbox"/> Communication List	<input type="checkbox"/> Known Relationship	<input type="checkbox"/> Serving Team
<input type="checkbox"/> Check In	<input type="checkbox"/> Elementary Area	<input type="checkbox"/> Nursery/Preschool Area	<input type="checkbox"/> Small Group
<input type="checkbox"/> Check in by Ability Level	<input type="checkbox"/> Family	<input type="checkbox"/> Organization Unit	<input type="checkbox"/> Small Group Section
<input type="checkbox"/> Check in by Age	<input type="checkbox"/> Fundraising Opportunity	<input type="checkbox"/> Peer Network	<input type="checkbox"/> Volunteer Check-in
<input type="checkbox"/> Check in by Data View	<input type="checkbox"/> General Group	<input type="checkbox"/> Security Role	<input type="checkbox"/> Weekly Service Check-in
<input type="checkbox"/> Check in by Grade	<input type="checkbox"/> High School Area	<input type="checkbox"/> Service Attendance	

**Save** **Cancel**

50 500 5,000 1 Defined Value

# Group Types

As you start to customize Rock for your ministry, you'll want to define new group types to match your various ministry areas (small groups, ministry groups, etc.)

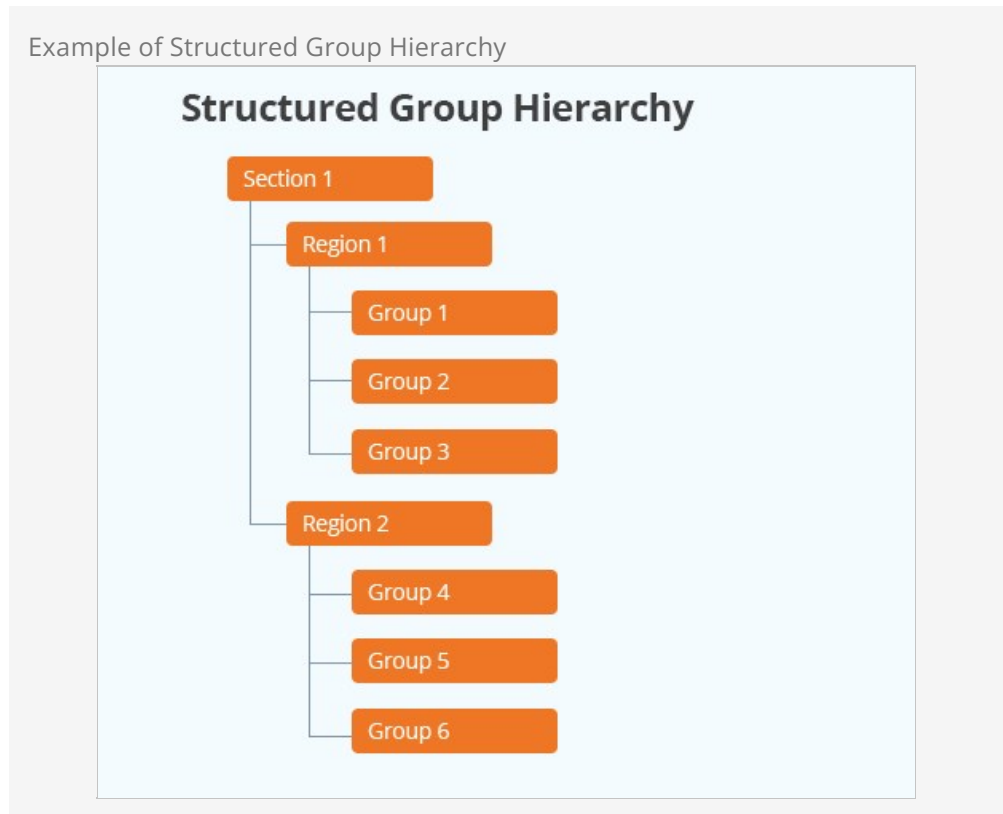
## Tip

Once you realize the power of group types, you'll be tempted to start creating many custom types to fit each of your ministries. Don't do it! Resist this temptation at first. Less is more. Look for common points within your many ministries. This will help you reduce the number of group types that you'll need. In general, it's easier to add new group types later than it is to merge group types in the future.

## Group Hierarchy

One of the most important concepts to understand as you create new group types is the relationship that groups have to each other. There are two basic hierarchy types to choose from:

- **Structured Hierarchy:** In this configuration, the levels of hierarchy are defined and limited. For example, you may want to define the hierarchy of your small group ministry to have a single leadership team, under them a level of lay leaders who act as coaches to the groups, and then the groups themselves. In a structured hierarchy you can be sure that this structure is enforced.



- **Flexible Hierarchy:** For some ministry types, you want your groups to have a more unstructured hierarchy. An example of this might be how you set up serving teams. You may want serving teams to be able to have sub-teams that might have additional sub-teams themselves. These hierarchies may be very deep in some ministry areas (like First Impressions) but shallow in others.



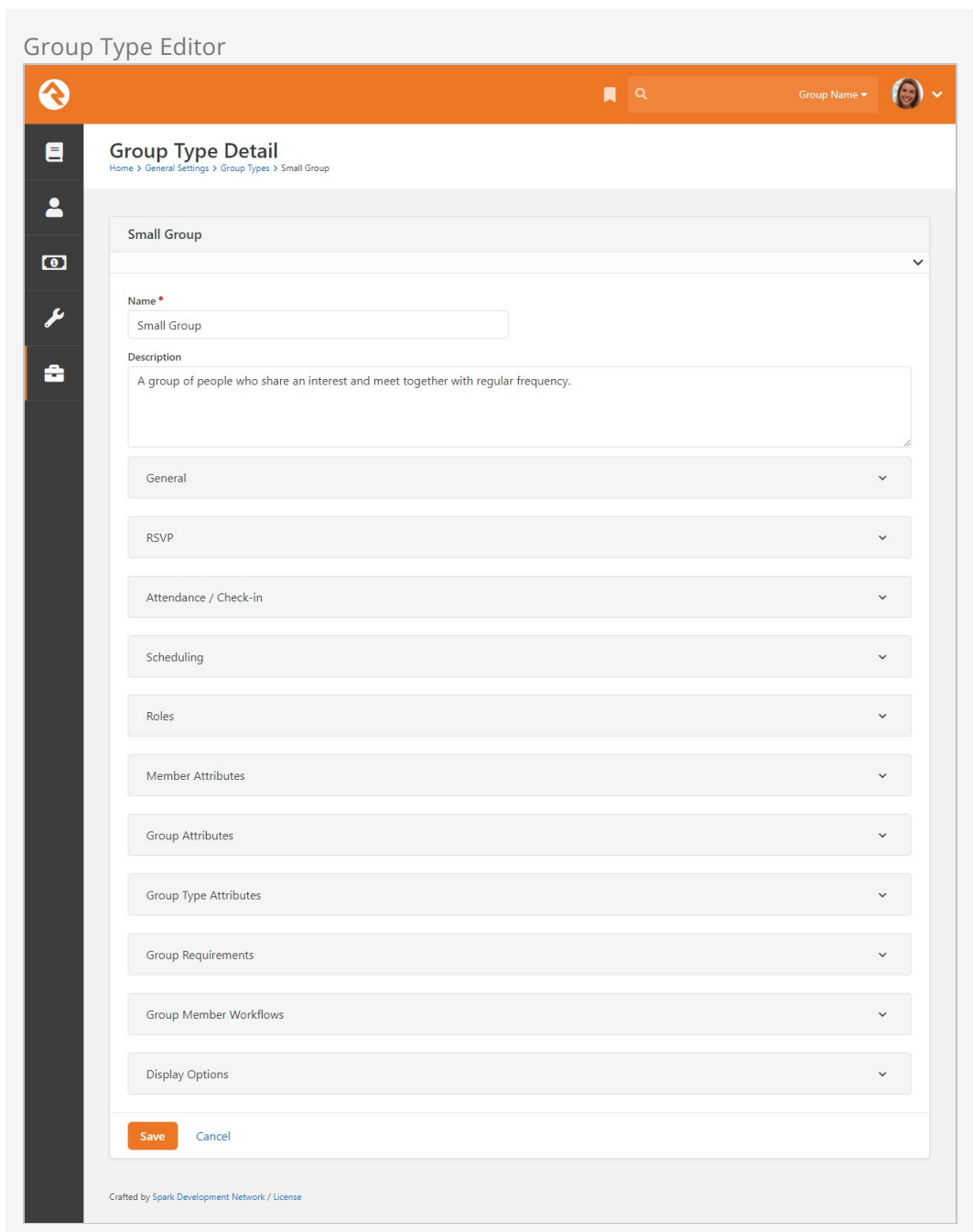
You define these hierarchies by configuring what child groups each group type can have. In the structured example, you would create a group type called *Small Group Leadership*, which would allow child group types of *Group Coaches*, which would allow child groups of *Small Groups*. The *Small Groups* would not allow any child types, ensuring that your hierarchy was fixed at the third level.

In the flexible hierarchy example, you would configure *Serving Teams* to have child-types of itself. This guarantees that you can have an unlimited hierarchy.

## Administering Group Types

You administrate group types under `Admin Tools > General Settings > Group Types`. When adding or modifying a group type there are many areas of configuration, as pictured below:





Let's look at the different Group Types settings you can configure in the *Group Type Detail* block.

### Show/Hide Group Type Settings

The following Group Type settings, located in the General section of the *Group Type Detail* block, control which panels and options should be shown or hidden in that block.

Setting	Description
Allow Specific Group Member Attributes	Determines if individual groups of this type are allowed to have their own group member attributes. If selected, the Member Attributes section will be shown when editing the group.

Setting	Description
Enable Specific Group Requirements	Determines if the Group Requirements section will be shown on the <i>Group Details</i> block.
Allow Group Sync	Determines if groups of this type are allowed to have Group Syncs. This will show/hide the Group Sync Settings section. If a group of this type already has group syncs, they will be kept. Unchecking this box will <b>not</b> prevent them from running.
Allow Specific Group Member Workflows	Determines if groups of this type should be allowed to have Group Member Workflows. If selected, the Group Member Workflows section will be shown.

### Common Group Type Settings

Setting	Description	Example
Group Term	This is what Rock will use to describe the group on the various screens.	Group, Family, Event, Team
Group Member Term	This is what Rock will use to describe the people in the groups on the various screens.	Member, Individual, Participant
Roles	Roles describe the relationship of the individual to the group. Are they a leader? Or just a member?	Leader, Member, Prospect
Default Group Role	The default role to use when someone is added to the group.	Selection of one of the roles defined for the group, like Member.
Allowed Child Group Types	As we discussed above, child group types help determine the hierarchy of the group tree. This tells Rock what kind of groups can be added as children of the current group.	Serving Teams may allow Child Serving Teams
Location Types	The types of locations that can be assigned to the group.	Meeting Location
Location Selection Modes	Determines how locations should be selected in Location Picker.	<p>The following options are available:</p> <ul style="list-style-type: none"> <li>Named - Allows you to pick from named locations that have been defined under <a href="#">Admin Tools &gt;</a> <a href="#">General Settings &gt;</a> <a href="#">Named Locations</a>.</li> <li>Address - Allows</li> </ul>

Setting	Description	Example
		<p>the input of a new street address for the location.</p> <ul style="list-style-type: none"> <li>• Point - Displays a map that allows for the selection of a specific latitude/longitude point.</li> <li>• Geo-fence - Also displays a map that allows for drawing a polygon shape to use as a geo-fence.</li> <li>• Group Member Address - Lists all of the addresses associated with the members of the group. Note that if the address of the group member changes the meeting location will not be automatically updated to this new address.</li> </ul>
Multiple Locations	Determines if the group can have multiple locations.	True/False
Group Attributes	The custom attributes that each group will have. When adding new Group attributes, the explicit authorizations from the Group Type are copied over to the Group attribute.	Meeting Day, Meeting Time, Topic of Study
Member Attributes	The custom attributes that each group member will have.	Hours Per Week Serving, Assigned Bus
Group Capacity Rule	Rock allows you to set individual capacities for groups. This configuration setting determines how the capacity should be enforced. If <i>Hard</i> or <i>Soft</i> is chosen, you'll get the option to make capacities required for all groups of this type.	<p>The following options are available:</p> <ul style="list-style-type: none"> <li>• None - This disables the group capacity features.</li> <li>• Hard - This places a hard limit on</li> </ul>

Setting	Description	Example
		<p>the capacity. Once the capacity is reached no additional group members can be added.</p> <ul style="list-style-type: none"> <li>• Soft - The soft option will warn you when adding a member that is over the group's capacity, but still allows you to add them. This warning only appears in the Group Toolbox, not when adding members from the internal administration pages (e.g., Group Viewer).</li> </ul>
Groups Require a Campus	This setting will require that all groups of this type have a campus when adding and editing.	True/False
Show Administrator	This setting determines if groups of this type support assigning an administrator for each group. Group administrators don't have the security privileges of Leaders, and they aren't members of the group. Generally, the group administrator is only used for internal purposes to identify who is responsible for the group from an organizational perspective. This is super useful in reporting because you can easily identify all the groups associated with an individual without having to add that individual to any of those groups.	True/False
Administrator Term	This setting allows you to customize the term used for the administrator of the group.	Administrator, Coordinator, Director
Enable Group Tag	This determines if tags are allowed for groups of this type.	True/False
Group RSVP Enabled	This setting enables Group RSVP features for groups of this type.	True/False

Setting	Description	Example
Enable Inactive Reason	If enabled, an <i>Inactive Reason</i> may be provided when inactivating a group.	True/False
Require Inactive Reason	Determines whether an <i>Inactive Reason</i> must be provided when inactivating a group.	True/False

#### Attendance and Check-in Settings

Setting	Description	Example
Takes Attendance	Determines if the group takes attendance. This will help to enable check-in and metrics features.	True/False
Weekend Service	Determines if attendance for this group should be counted towards attending a weekend service. For example, the attendance badge on the Person Profile will only consider attendance in groups with this value enabled.	True/False
Group Schedule Options	This setting is used when you want to configure a schedule for the groups of this type. The schedule is used for features like group attendance and group member scheduling. The options you select here help determine the types of schedules that can be configured for the groups.	<p>Schedule type options include:</p> <ul style="list-style-type: none"> <li>• <b>Weekly:</b> This option allows a simple weekly schedule to be selected. When setting up a group of this type, all you'll need to do is select the day of the week the group meets and the start time. We highly recommend that you use this setting as it is the only schedule option that is usable as a filter in the Group Finder.</li> <li>• <b>Custom:</b> With this option enabled each group can select its own repeating schedule. This option allows for the most power and flexibility, but the schedule that's created can't be used as a filter in the Group Finder.</li> <li>• <b>Named:</b> The named option allows you to pick the group's schedule from a list of preconfigured schedules. These schedules are configured under <a href="#">Admin Tools &gt; General Settings &gt;</a></li> </ul>

Setting	Description	Example
		<a href="#">Schedules</a> . Like the <i>Custom</i> option this setting can't be used as a filter in the Group Finder.
Schedule Exclusions	This setting allows you to define a set of date ranges when all of the groups of this type will not meet regardless of the specific group schedules. This allows you to easily configure breaks and holidays without having to edit each group's schedule individually.	Set of date ranges when groups of this type will not meet.
Check-in Rule	Determines how check-in will work if the person is not already in the group.	Add on Check-in (adds the person to the group if they are not already in the group), Already Belongs (the individual must already belong to the group)
Group Attendance Requires Location	This option will require that all attendance occurrences have a location.	True/False
Group Attendance Requires Schedule	This option will require that all attendance occurrences have a schedule.	True/False

### Advanced Group Type Settings

These settings will be rarely used, but it's helpful to know they exist as you define your group types.

Setting	Description	Example
Purpose	The purpose helps categorize different group types together. This allows you the flexibility of creating multiple group types but at the same time providing a way of 'linking' these various types together with a single 'purpose'. To add a new purpose simply add a new <i>Defined Value</i> under <a href="#">Admin Tools &gt; General Settings &gt; Defined Values &gt; Group Type Purpose</a> .	While we recommend that you start with a single group type to manage your various serving teams you could over time add new ones. You would then create a purpose to describe them all as serving opportunities.
Group	Custom attributes that will be	Group Type Attributes are used by

Setting	Description	Example
Type Attributes	shared by every group of this type. In other words, every group of this type will have the same value of these attributes.	the check-in system. Most group types won't have a need for them.
Print Using	When printing check-in labels, should the device's printer or the location's printer be used? The options are: <ul style="list-style-type: none"> <li>• Device Printer - Always print using the device's printer.</li> <li>• Location Printer - Always print at the printer configured for the location.</li> </ul>	This setting will have limited value outside of configuring check-ins.
Inherited Group Type	This allows you to create a group type that inherits its attributes from another group type. This is helpful when you have two group types that are very similar, but one needs a few more attributes.	Say you have a <i>Serving Team</i> group type that covers most of your serving groups. Your worship teams, however, would like to add a special attribute for <i>Instruments Played</i> . You want this new group type to have all of the same attributes of the current <i>Serving Team</i> . To solve this, add the <i>Serving Team</i> group type as the <i>Inherited Group Type</i> of the new <i>Worship Serving Team</i> group type.
Show Connection Status	This allows you to show a person's connection status in a column on group member lists.	This comes in handy for trying to understand a person's connection to your organization at a glance.
Show Marital Status	This allows you to show a person's marital status in a column on group member lists.	This comes in handy for quickly viewing a person's marital status.

## Group Member Roles

People often have special roles in groups. Some are leaders; others have unique duties. To help differentiate the members of a group, you can give each a Group Member Role. The list of possible roles is defined on the group type. For more information on the roles available, you can check out the chapter on Group Members.

### Family Roles


As noted above, roles are defined on the group type. While we encourage you to add roles as needed in general, we recommend against adding new roles to Family group types. Using values other than "Adult" or "Child" may cause issues with certain system processes, such as determining Age Classification.

# Securing Groups


Most groups you create will need to have some level of security added to them. They may or may not contain the world's secrets, but you'll want to control who can add, edit and/or delete them at the very least.

## Securing Group Types

By adding security to a group type, you control the base security of every group of that type. Let's say your organization adds a new type of group to help manage some classes you're starting. You may want to create a new group type for this initiative where every class is a group of this new type. By adding security to the group type, you can ensure that every group can be viewed and edited by a select handful of people.

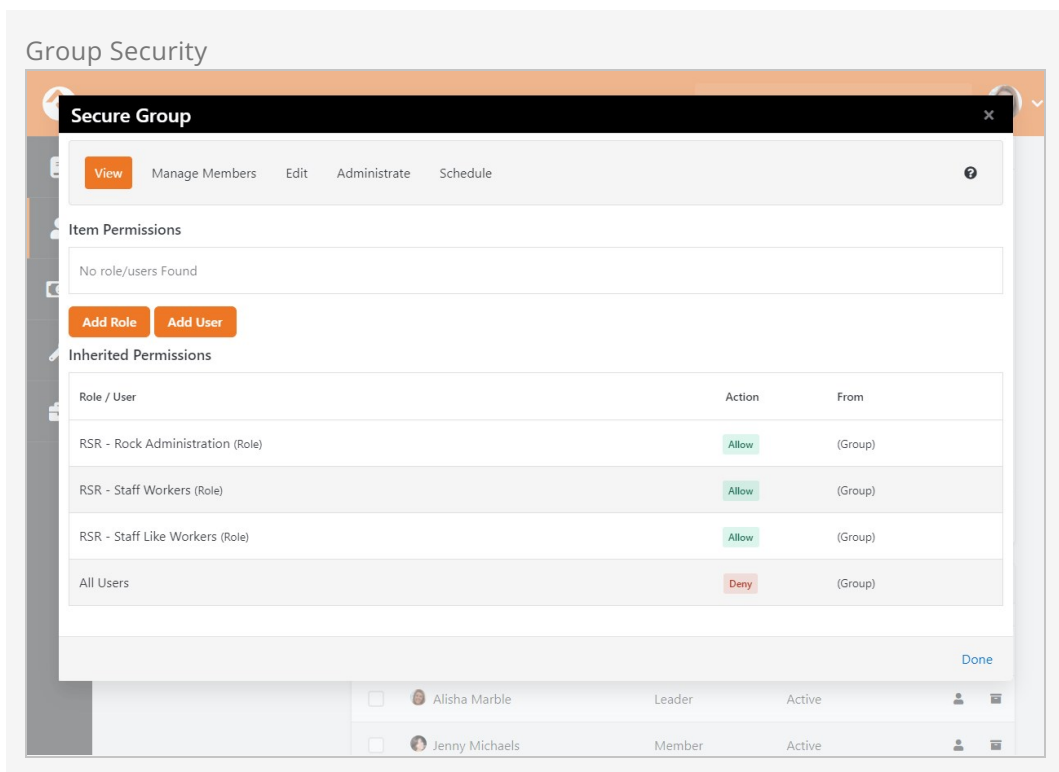
To add security to a group type, go to [Admin Tools > General Settings > Group Types](#). There you will see a list of group types in a table. In the far right column, you will see a  button. Clicking this will allow you to set the security for the selected group type.

## Securing A Group

There may be occasions where each group will need different security settings. Don't worry, this is super easy in Rock. To secure a specific group, find the group in the group viewer ([People > Group Viewer](#)). On the group details page, you'll find the same  button. Clicking this button will bring up the Rock security dialog where you can adjust the security settings.

Groups have a special *Manage Members* security tab. Anyone with *Manage Members* security can add, edit and delete group members, but they can't edit or delete the group itself. If no permissions are listed under *Manage Members*, it doesn't mean that members can't be managed. Anyone with *Edit* access has *Manage Members* access by default. Also, group Leaders can manage members even if no *Manage Members* permissions are set or if they don't have *Edit* permission.





Note the inherited permissions at the bottom of this screen. Inherited security is a very powerful concept with groups. By default, a group will inherit the security of its parent groups and group type. This limits the amount of security configuration each group requires. These inherited rights are only a starting point. You can either build on top of these permissions or override them. The choice, and power, is up to you.

At first you may be tempted to go overboard with your group's security settings. In general, it's best to keep them simple. For instance, in the case of home-based Bible studies you may be tempted to secure each group differently to only allow the leader to edit them. While in certain cases you may need to do this, you could also secure all groups with a generic *Small Group Leader* role. You could then limit which groups a leader was able to navigate to through the configuration of your leader toolbox blocks.

### Group Creator Security

In older versions of Rock, the person who created a new group would automatically have Administrate permissions for the group they added. This behavior can now be controlled via block settings.

The Group Detail block has a setting called *Add Administrate Security to Group Creator*. When this is set to "Yes" then the person who created the group will automatically have the security permission to *Administrate* the new group being added.

The default value for this setting is "No", which means the person creating the group will not be able to administrate the group unless they have permissions from another role that would allow them to do so. If you started off on an older version of Rock, this won't retroactively impact security permissions for any existing groups.

### Group Member Roles

Group member roles play an important part in how groups are secured. Each role can be configured to provide *View* and / or *Edit* rights. This is configured under `Admin Tools`

`> General Settings > Group Types`.

## Inherited Permissions

When determining the security of a group it's important to consider not only the specific permissions of the group but also the inherited permission rules. The inheritance rule for groups is:

Current Group > Group Type Security > Parent Group Security > (continue up the hierarchy until it reaches the root group) > Group EntityType Security > Global Default.

The primary inheritance rules come from the group's hierarchy, but the system has a built in 'choke point' check on the security of the group type first. Why is this? Adding a quick check of the group type's security allows specific types of groups to have unique security considerations. Take for example a group type for 'Addiction Classes'. Adding a check for the group type's security allows a way for limiting visibility to these groups without having to worry about inconsistencies in the security of the group hierarchy. In most cases the group type will not have specific security so this check will not matter, but it's there if you need it.

If when checking the group's security, the person is blocked access there's still one last check to be done. Roles defined on the group type can be configured to provide access to the group. For instance, you can configure the leader of a group to have view/edit rights to that group. Likewise, the member of a group could be set up to have view access. This allows a very simple and flexible way of providing access to external individuals.

# Group Strategies

The flexibility built into Rock groups is very powerful. But like a puzzle when you open the box and dump out the pieces, it can be a little overwhelming to get started. Below are a few strategies for you to consider first. Don't be afraid to ask others how they have configured their groups. The Ask section of the Rock website is perfect for these kinds of discussions.

## Multiple Group Viewers

Rock comes preconfigured with a general group viewer `People > Group Viewer`, but you can add more. Say, for instance, your church has a strong small group ministry. You may want to create a new *Group Viewer* page just for this ministry. You can do this by adding a new page under *People* (or any other page you like) and adding the group viewer blocks to the page as described below.

## Group Viewer Blocks

The screenshot displays a web interface for a 'Group Viewer'. On the left is a dark sidebar with navigation icons. The main content area is divided into three sections:

- Groups (1):** A tree view showing a hierarchy: Global Connector Group > Section A > Alisha Marble's Group > Decker Group (selected) > Pete's Group > Section B > Serving Teams > Ushers > General Groups.
- Decker Group (2):** A details panel for the selected group. It includes:
  - Header: 'Decker Group' with a 'Small Group' toggle and a star icon.
  - Description: 'Small group with Ted as the group leader.'
  - Parent Group: 'Section A'.
  - Schedule: 'Monday at 7:00 PM'.
  - Topic: 'Book of Genesis'.
  - Meeting Location: A map showing the address '11624 N 31st Dr Phoenix, AZ 85029-3202'.
  - Buttons: 'Edit' (orange) and 'Archive' (blue).
  - Actions: A row of icons for refresh, share, location, and lock.
- Group Members (3):** A table listing group members with filter options and icons for each row.

Name	Role	Member Status		
<input type="checkbox"/> Ted Decker	Leader	Active		
<input type="checkbox"/> Cindy Decker	Member	Active		
<input type="checkbox"/> Alisha Marble	Member	Active		
<input type="checkbox"/> Bill Marble	Member	Active		

At the bottom of the member list, there are pagination controls: '50', '500', '5,000', and '4 Group Members'. A footer note reads 'Crafted by Spark Development Network / License'.

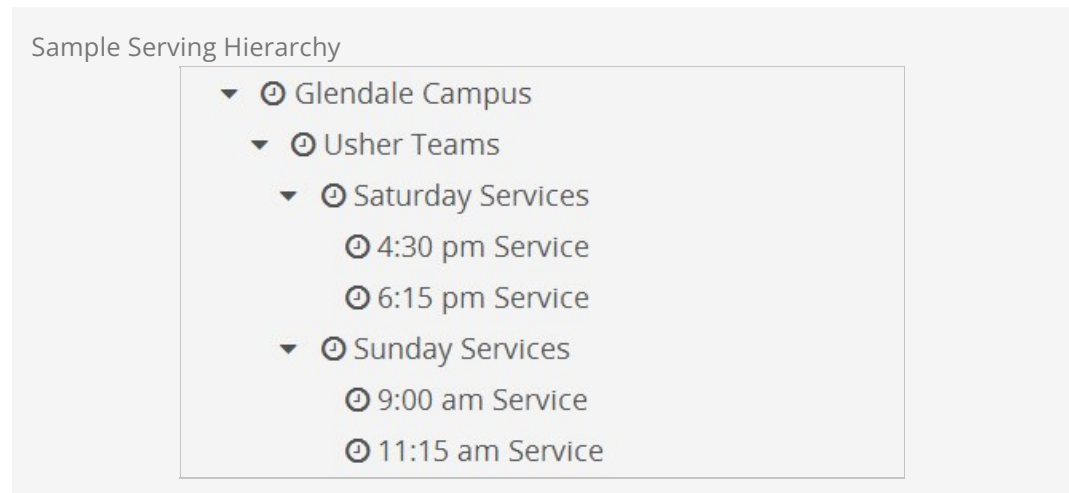
The following blocks are used to make a group viewer page. We recommend that you use the *LeftSidebar Panel* page layout.

- 1 Group Tree View**  
Add a group tree view block to the sidebar zone to help you navigate your group hierarchy.
- 2 Group Detail**  
Add the group details block to the top of the main zone.
- 3 Group Member List**  
Next, add the group member list block under the group details.

When you set up the *Group Tree Block* you can set the root group to start with, and limit which types of groups it will display. This allows you to make a very specific small groups viewer with just a couple of clicks.

## Group Folders

As you start to think about your group hierarchies, make sure that you plan for growth. This might mean that you create special groups in your hierarchy to help categorize your groups. You can think of this like using folders on your computer to help manage all of your files. You could throw all of your files in one folder, but you'd never find anything. Adding folders helps you arrange and sort your groups. While folders add little value to your computer's file system, these *category groups* can actually be beneficial beyond just organizing. For instance, if you add these category groups to your serving teams, the categories can act as leadership teams for their sub-groups. Take a look at this example of the first impressions serving teams at a large multi-campus church:



Notice how each campus and ministry area has a leadership group. These groups not only help arrange the serving teams, but they can also have members of their own that represent the leadership team for each area.

# Group Schedules

Let's take a brief moment to see the various scheduling options for groups and how these settings affect the features available.

## Types of Group Schedules

There are three types of group schedules that can be configured for a group. To help simplify the editing of a group we allow you to configure which of these options are available to groups of each particular type. For instance, you'll probably want to configure your *Small Groups* to only be configured to allow the *Weekly* schedule. You can select which of these options are available for a specific group type under [Admin](#)

[Tools](#) > [General Settings](#) > [Group Types](#) .

### Weekly

This option allows a simple weekly schedule to be selected. When configuring a group, one only needs to select the day of the week the group meets and the start time. We highly recommend that you use this setting because it is the only schedule option that is usable as a filter in the *Group Finder*. For example, if you set your small groups to the *Weekly* schedule option, your website visitors can find groups that meet on a specific day of the week that's convenient for them.

### Custom

With this option enabled, each group can select its own repeating schedule. This option allows for the most power and flexibility, but the schedule created can't be used as a filter in the *Group Finder*.

### Named

The *Named* option allows you to pick the group's schedule from a list of preconfigured schedules. These schedules are configured under [Admin Tools](#) > [General Settings](#) > [Schedules](#) . Like the *Custom* option, this setting can't be used as a filter in the *Group Finder*.

## Schedule Exclusions

Picture this: you've just finished entering all of your small groups into the system with their correct schedules and your supervisor just announced that, "groups are taking a two-week break." Not a problem! Adding a *Schedule Exclusion* to the *Small Group* group type will add the exclusion(s) to the schedule of all groups of this type. This is done under [Admin Tools](#) > [General Settings](#) > [Group Types](#) . This not only keeps the schedule

accurate, but it also keeps attendance reminders from being sent while groups are not meeting.

# Group Attendance

Whether you're following the leadership principle of *inspect what you expect* or you simply want to keep a pulse on the health of a group, the group attendance feature can simplify the process of gathering participation details of your group members.

## Configuring a Group for Attendance

Before a group can take attendance, its group type must first be configured to enable attendance tracking under `Admin Tools > General Settings > Group Types`. From here you should select the group type you'd like to configure check-in for. Under the *Attendance / Check-in* tab enable the setting *Takes Attendance*.

While this one setting is all you need to enable the attendance features, there are a couple of other settings that help improve the attendance tools:

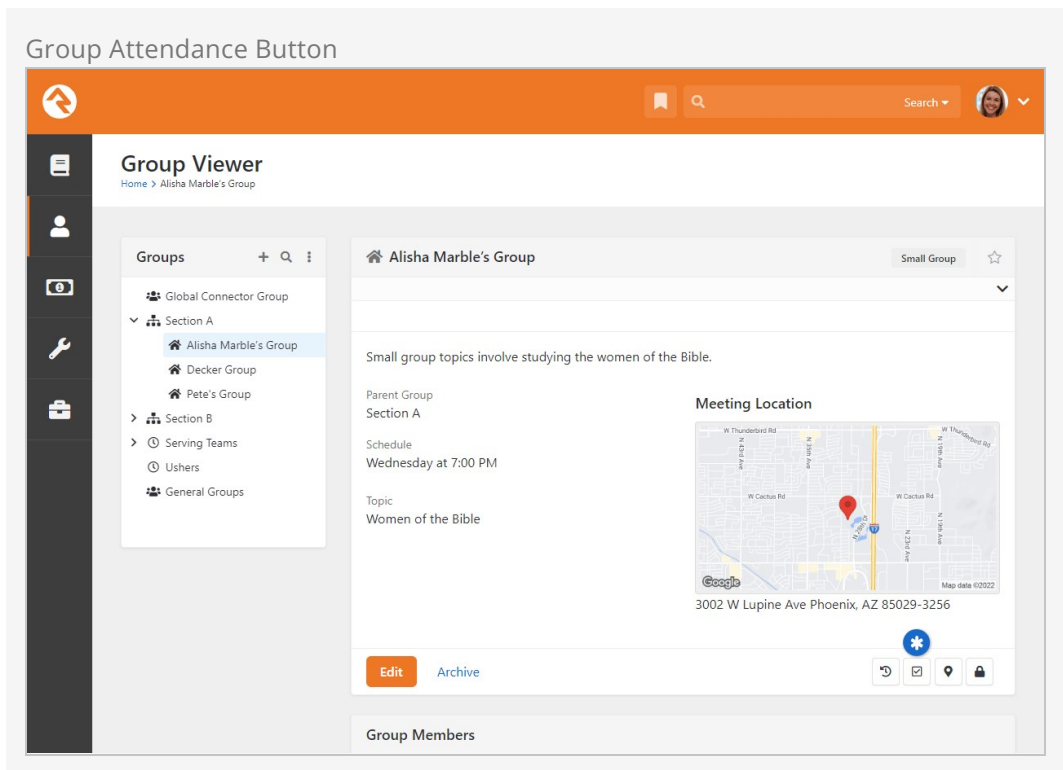
- **Group Schedule Options:** While a group schedule is not required to take attendance, having a schedule will simplify the attendance entry because it will guide the user to enter attendance on those dates when the group meets.
- **Schedule Exclusions:** While each group can set its own schedule (including exclusion dates) you may want to set exclusion dates for every group of this type. This is especially helpful when using the simple schedule option where you only specify the day of the week and the start time for a group. Adding these group type schedule exclusions helps to keep email attendance reminders from being sent.
- **Send Attendance Reminder:** This checkbox will enable the sending of an attendance reminder email or text message to the group leader the day the group is scheduled to meet.

## Entering Attendance Information

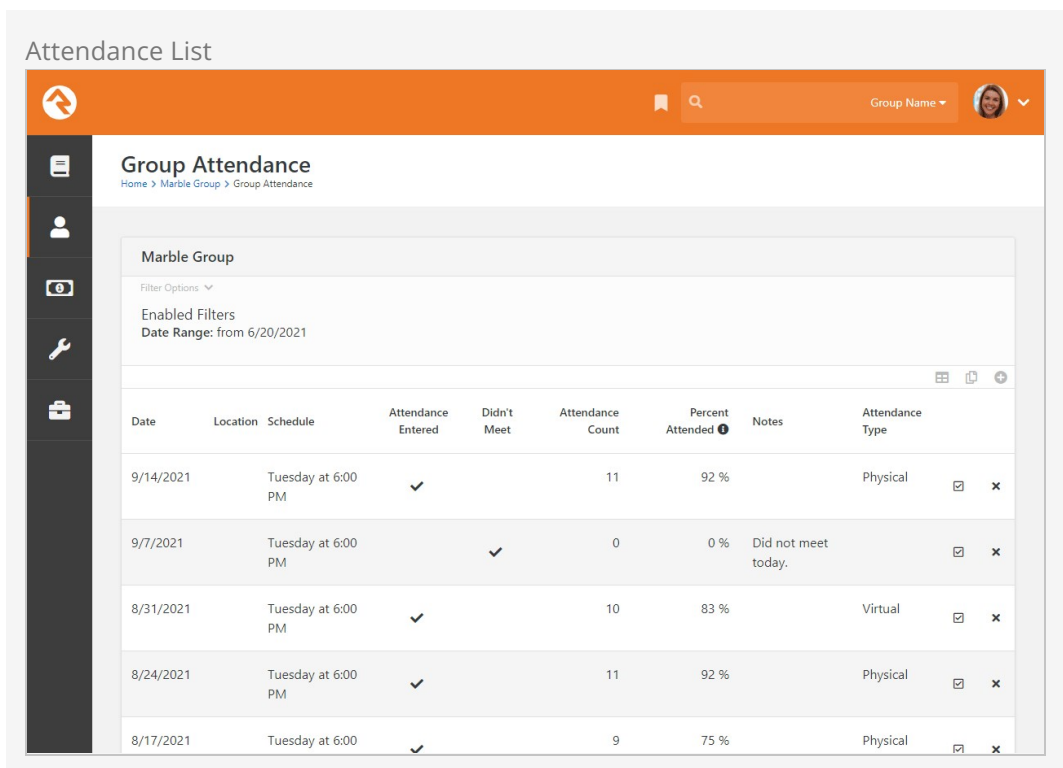
### Internal Attendance Features


There are several ways to collect group attendance. The first is to use the internal attendance features built into the Group Viewer under `People > Group Viewer`. You'll notice an attendance button on the group details block for groups that are configured to take attendance.





Selecting this option will bring up the group attendance grid. This grid lists the previously entered attendance for the group and allows you to enter new attendance records from the add button in the grid's header or footer.



Selecting the  button will take you to the attendance entry screen pictured below. From this screen you can check off all those who attended the group or note that the

group did not meet on its scheduled date and time. You can also print an attendance sheet, which allows attendance to be collected via a register.

Attendance Entry

Attendance

Home > Marble Group > Group Attendance > Attendance

Marble Group Attendance

1 Attendance For  
Tuesday, April 25, 2023

2 Schedule  
Tuesday at 6:00 PM

3 We Did Not Meet  Attendance Location 4 Physical  Virtual

5 All Present 6 Search 7 Add Note 8 Roster

9

Harper, Jack Member	Jones, Will Member	Marble, Alisha Member	Marble, Bill Leader
Michaels, Jenny Member	Peterson, Becky Member	Peterson, Brian Member	Sweeney, James Member
Sweeney, Nancy Member	Tennant, Rob Member	Tennant, Sheryl Member	Tucker, Dale Member

Back

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- 1 Attendance For**  
The date for which attendance is being recorded.
- 2 Schedule**  
If a Named schedule is being used for this group, it will be shown here.
- 3 We Did Not Meet**  
Select this checkbox if there was no attendance because the group did not meet. This distinction is helpful for record-keeping, but also impacts areas like Streaks.
- 4 Attendance Location**  
If enabled in the block's settings, here you can select the type of attendance, like physical (in-person) or virtual (online). If you need other options, you can manage these values using the *Attendance Types* Defined Type. Edit the Attendance Entry block's settings to restrict the available options to only certain Attendance Types, or to change the "Attendance Location" header to say something else.
- 5 Attendance Count**  
After attendance has been entered, the count of attendees is displayed.
- 6 Search**  
For larger groups it can be helpful to search for the people you're looking for.
- 7 Notes**  
If enabled in the block settings, notes can be added here. Notes will appear in the Attendance Summary Notification email if you are using that

feature. The label “Notes” can be customized in the block settings.

#### 8 Attendance Roster

Click the Roster button to generate a printer-friendly version of the attendance page. This will be a Word document that you can then update, print or save.

#### 9 Members

Attendance is tracked by clicking the cards of those who attended. You can see here that nine people were in attendance on that day.

### External Attendance Features

Entering attendance on this internal screen is great for staff-entered attendance. Often times you will want to push the responsibility of attendance entry to the group leaders. One way to do this is to allow them access to the leader toolbox. See the [Group Leader Toolbox](#) chapter for details on this set of tools.

### Rapid Attendance Entry

The Rapid Attendance Entry method of recording attendance may come in handy for your groups. To learn more, see the [Rapid Attendance Entry](#) chapter of the [Checking-out Check-in](#) manual.

## Attendance Reminders

You can also configure Rock to send a communication to the group leader on the day that their group meets to remind them to take attendance. This communication will include a link to take them straight to the attendance detail screen. Since each group leader gets an individual communication, we have enabled this link to not require a login to help simplify the process (the user however must have edit rights to the group to enter attendance).

There are two other key configuration points for attendance reminders.

The first is the system communication that is used as the template for the reminder. This template can be edited by navigating to [Admin Tools > Communications > System Communications > Group Attendance Reminder](#). See our [Communicating With Rock](#) guide for more information. If the template is configured for both email and SMS, and if your system is set up to send emails and text messages, then the reminder can use either medium. Group leaders will receive either an email or a text, depending on how the job is set up.

The other configuration point is the job that is run to send the communications on a daily basis. This job must be created for every group type that requires reminders. For more information on this job see the [Service Jobs Relating To Groups](#) chapter below.

## Before You Report

When running reports on attendance data be sure to filter on *Did Attend* to show those who attended the event.

## Group Attendance Digest

The *Group Attendance Digest* is an email containing a summary of attendance information for one or more groups. See the *Service Jobs Relating to Groups* chapter for information on setting up the Send Group Attendance Digest job.

### Example Group Attendance Digest Email



Below is the attendance summary for groups that meet from 6/1/2020 - 6/7/2020.

Please review each note and reply to the group leader if needed.

Small Group Name	Meeting Date	Attendance	Notes	
Group #3 (Saturdays @ 2:00 PM)	6/6/2020	3/3	Perfect attendance!	<a href="#">Email Leader</a>

### Contact Info:

3120 W Cholla St Phoenix, AZ 85029

Phone: (555) 555-5555

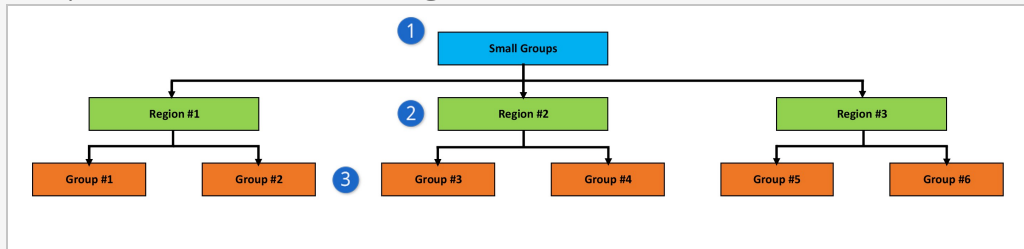
Email: [info@rocksolidchurchdemo.com](mailto:info@rocksolidchurchdemo.com)

Website:

<http://www.rocksolidchurchdemo.com>

The Group Attendance Digest may not be the right fit for all of your groups. It's only intended for a specific type of groups structure that we'll describe below.

## Group Structure for Attendance Digest



### 1 Parent Group

This is the Parent Group for all of the other groups below it. This group will be added to the Send Group Attendance Digest job configuration, which we'll talk about in the *Service Jobs* chapter below.

### 2 Region or Area

Individuals in these groups who have a group role that's configured as *Is Leader* will receive a digest email for the associated child groups. If these groups have multiple *Leaders*, then each will receive their own email individually.

### 3 Attendance Group

These are the groups where attendance is being recorded. The attendance in these groups will be emailed to the *Leaders* of their respective parent groups. For instance, the attendance in 'Group #3' and 'Group #4' will be emailed to the *Leaders* in 'Region #2'.

The *Leader* of the attendance group will be contacted when the 'Email Leader' link is clicked from the Attendance Digest email as shown in the prior screenshot above.

The chart above has three "Regions" with two "Groups" below each region. But you're not limited to those numbers. You can have only one region with five child groups below it, or ten regions with a single child group each. The only requirement is that you need all three hierarchical levels, with a single parent group at the very top.

# Group Sync

Have you ever thought, *"With people constantly coming and going, how am I supposed to keep the members of this group up to date in Rock?"* Well, the Group Sync might just turn out to be your next best friend.

Group Sync automates the process of keeping group membership updated by adding and removing members for you. Take, for instance, a security group that gives access to a toolbox for your group leaders. Without Group Sync, every time a leader is added or changed someone would have to remember to manually adjust the toolbox security group accordingly. With the Group Sync feature, this can all be automated for you.

## Configuring Group Sync

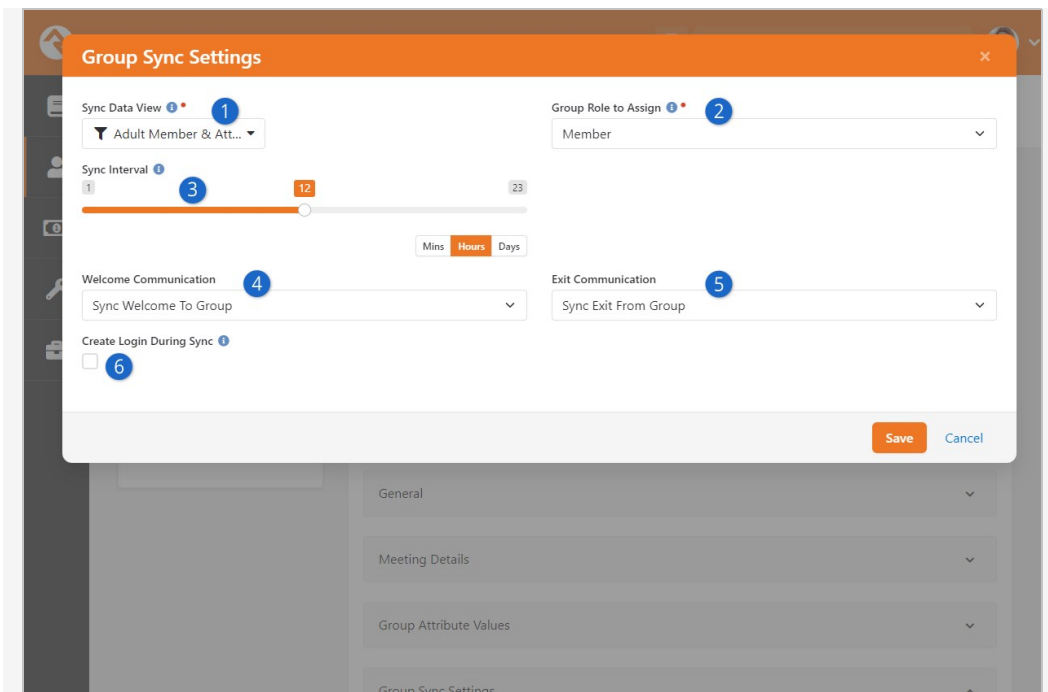
Configuring your groups to sync takes only a few one-time steps. After you've got it all set up, you can sit back and watch Rock do the work for you.

To get started, you'll want to make sure that Group Sync is enabled for the groups you're working with. This is set at the Group Type level, as described in the [Group Types](#) chapter above.

Next, you'll need to create a [Data View](#) that returns the people who should be synced as group members. The list of people in this data view will be compared against the list of the group's current members. If there are any differences between those lists, the group's membership is updated so that it matches the data view.

With Group Sync enabled and your data view in place, go to the group you'd like to sync and edit its details. If you have *Administrate* access to the group, you'll see a panel labeled `Group Sync Settings`. At first, when you're just getting started, there won't be anything listed in this panel. Click the **+** to add your sync as described below.

Group Sync Settings



### 1 Sync Data View

This is the data view you created to use as the source of your sync. The people found by the data view are compared against the current members of the group, and changes to group membership are made if there are differences.

### 2 Group Role to Assign

Select the role you want to assign to group members added by the selected data view. Each sync works with one role at a time, so you'll need a second sync like this one if you want to automatically manage both 'Leaders' and 'Members'.

### 3 Sync Interval

This setting controls how frequently this group should be synced. Having a lot of group syncs running constantly throughout the day might create performance issues in your system, even if no changes are made. So, try to keep the frequency as low as possible according to your needs. When setting the sync interval here, you'll want to keep the Group Sync job in mind, which we'll discuss a little later below.

### 4 Welcome Communication

If you'd like to notify new group members of their new status in life you can configure a system communication to let them know. We've provided a good template called *Sync Welcome To Group* that covers most cases. If the member already had a login, it even reminds them what their username is (not their password though, we store that in a super-secret way that not even we can decrypt). If you've enabled *Create Login During Sync* below, and if the person doesn't already have a login, the communication will include their new username and password (we know the password in this case because we just created it).

### 5 Exit Communication

You can also choose to send a notification letting people know that they're no longer part of the group. This can be helpful in some cases but isn't

required. We've provided a template called *Sync Exit From Group* for this purpose.

#### 6 Create Login During Sync

When syncing with security roles, you may also want the job to create logins for new group members. This will give those members access to use their new permissions.

## Group Sync Job

As noted in the prior section above, the *Sync Interval* setting for the group controls how frequently the group's members are checked against the data view. However, this is only part of the equation.

There's a system job called *Group Sync* that actually does the syncing we've been describing in this chapter. By default, this job runs once every 20 minutes. Most of your groups won't need to be synced that frequently, so you generally don't need to worry about when the job runs. The only time it might cause an issue is if you've configured a group to sync at a more frequent interval than the job. That should be an extreme case, but if you need to change the frequency of the job you can do so under [Admin Tools >](#)

[System Settings > Jobs Administration](#).

### Security Tip

The *Group Sync* job has a setting to create new logins in such a way that the individual will need to reset their password on their first login. This setting is initially set to not require a reset. Feel free to change this if you'd like.

## Managing Synced Group Members

Once a Group Role is managed by a sync, members cannot be added to that role manually. You can still manually add people to the group, just not with that role.


That's because if you're manually adding a person to a synced group, then it means the person doesn't meet the criteria of your data view. The sync would remove that person from the group the next time it runs, undoing your manual work. That's why each sync is specific to a role, so you can have some roles that are synced and others that are managed manually.

For the same reason, you can't manually remove synced group members. If you did, they would just be put back in the group by the sync the next time it runs. If you need to remove a synced group member, consider updating the data view to account for that person's scenario.

If you want to stop syncing a group, you can remove the sync from that group's settings, and it will keep the members. At that point, members of the group would need to be managed manually.

You'll also notice  icons in the group's member list, to notify you that the member is



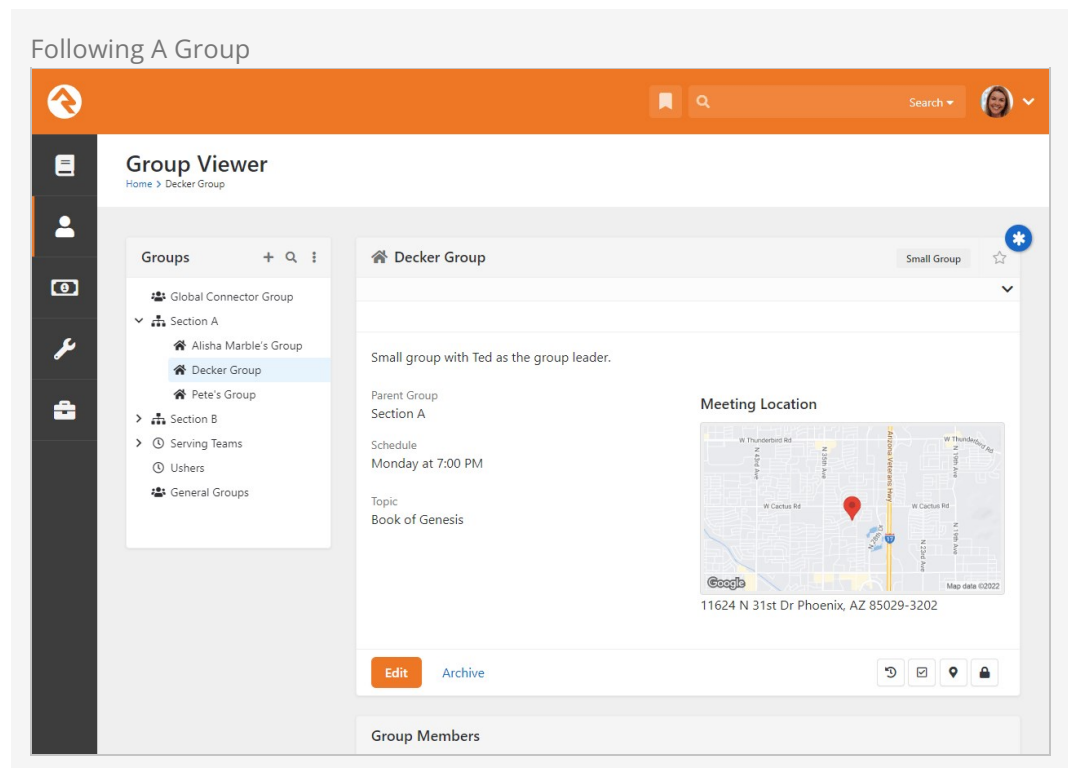
being automatically synced. The  icon is also displayed in the upper-right corner of the list. If you hover your cursor over the icon, Rock will display the roles being used to sync the members of the group. From there, you can manually sync the group rather than waiting for the Group Sync job.

# Group Following

Hopefully by now you've seen how to follow a person. If not, stop what you're doing and [read this](#). You can also follow a group. Why...? Following a group allows you to put that group into easy reach from your [My Dashboard](#) page.

## How To Follow

Following is super simple. First navigate to the group you'd like to follow. Then, press the follow star in the upper right of the group detail block.



Also note that when you have an event registration that places registrants into a group, you can configure the registration to notify all individuals who are following that group.

# Group Members

Group members are a key component of groups. Like groups, they come with a ton of options for customization.

## Group Member Roles

People often have special roles in groups. Some are leaders; others have unique duties. To help differentiate the members of a group, you can give each a *Group Member Role*. The list of possible roles is defined on the group type. Each role has the following configuration options:

- **Is Leader:** Determines if the individuals in this role are considered leaders within the group. This option enables additional functionality within Rock.
- **Receive Requirements Notifications:** Individuals in this role will receive notifications of group members who do not meet the group's requirements. This only applies if you've configured the Send Group Requirements Notification job.
- **Can View:** This gives the members of this role the ability to view the group information in various group toolbox blocks.
- **Can Edit:** Allows members to edit group information in various group toolbox blocks.
- **Can Manage Members:** Individuals with this role will be able to manage group members (e.g., change their role, status, etc.) regardless of the security settings on the group itself.
- **Minimum Required:** Rock allows you to have rules on how many individuals can have certain roles. This setting configures the minimum number of individuals who must have this role. This will keep you from deleting a group member if the deletion will drop the number of individuals with this role below the minimum.
- **Maximum Allowed:** This setting is like the minimum but limits the number of people who are allowed this role. For instance, you might configure a group type to only allow one person to be the leader. You can also use this option to limit the number of adults in a family. A family is a group type.
- **Default:** When someone is added to a group, this will be the default role they'll be

assigned to. Note: Some blocks will have a block setting that overrides this default. This setting will handle cases when a block does not provide an overriding setting.

## Group Member Status

The status of the group member tells you the person's standing within the group. The available statuses are:

- **Active:** The individual is currently participating in the group.
- **Inactive:** The individual is not currently participating in the group. Usually, this status denotes that the person did participate at one point but isn't doing so anymore. How you choose to use this is up to you.
- **Pending:** The individual has not yet fully joined the group.

## Group Member Attributes

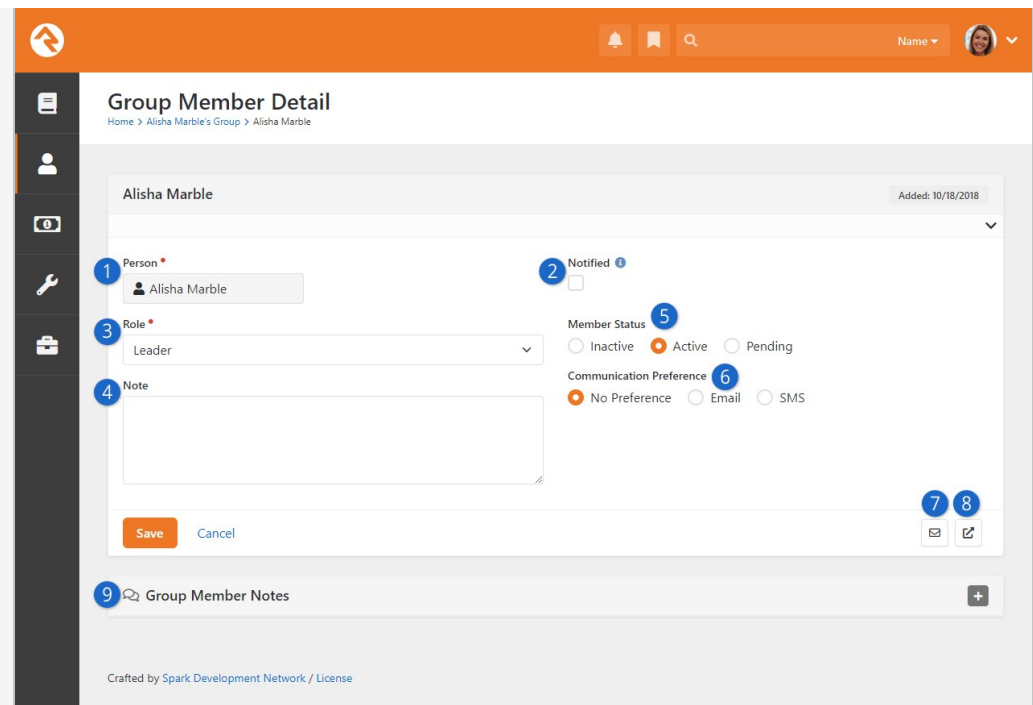
Group members can also have attributes. This allows you to track custom data points for each person as it relates to their membership in the group. Usually, these *Group Member Attributes* are defined on the *Group Type* under `Admin Tools > General Settings > Group Types`. When they're configured here, the attributes will apply to every group member in groups of this type.

You can also add Group Member Attributes to a specific group under `People > Group Viewer > Group` if you have *Administrate* access to the group. This also requires that there is at least one Group Member Attribute defined at the group type level, or that the group type has *Allow Specific Group Member Attributes* enabled.

## Editing a Group Member

Selecting a group member from a group member list will take you to the group member detail screen shown below. From here you can change the role and status of the group member. You will also be able to modify any of the *Group Member Attributes* defined for the group.

Editing a Group Member



### 1 Person

The name of the person is shown here for reference. You can't change the group member from here. Instead, you would add a new group member or remove an existing member.

### 2 Notified

This indicates whether the group leader has been notified about the person's membership in the group. This only has an effect if you're running the Group Leader Notification job.

### 3 Role

We talked about group member roles above. This is where you set or change the role that this group member has in the group.

### 4 Note

Here you can add a note about the group member or their membership in the group.

### 5 Member Status

Group members can either be Active in the group, Inactive or Pending.

### 6 Communication Preference

This sets the person's communication preference as it relates to this group's communications. This does not impact the Communication Preference that would be set on the person's profile.

### 7 Quick Communication

Click this icon to send a quick SMS or Email communication to the group member.


### 8 Move Group Member


Click this icon to transfer the person from this group to a different group. See the next section below, and the [Alternate Placements](#) chapter, for more details.

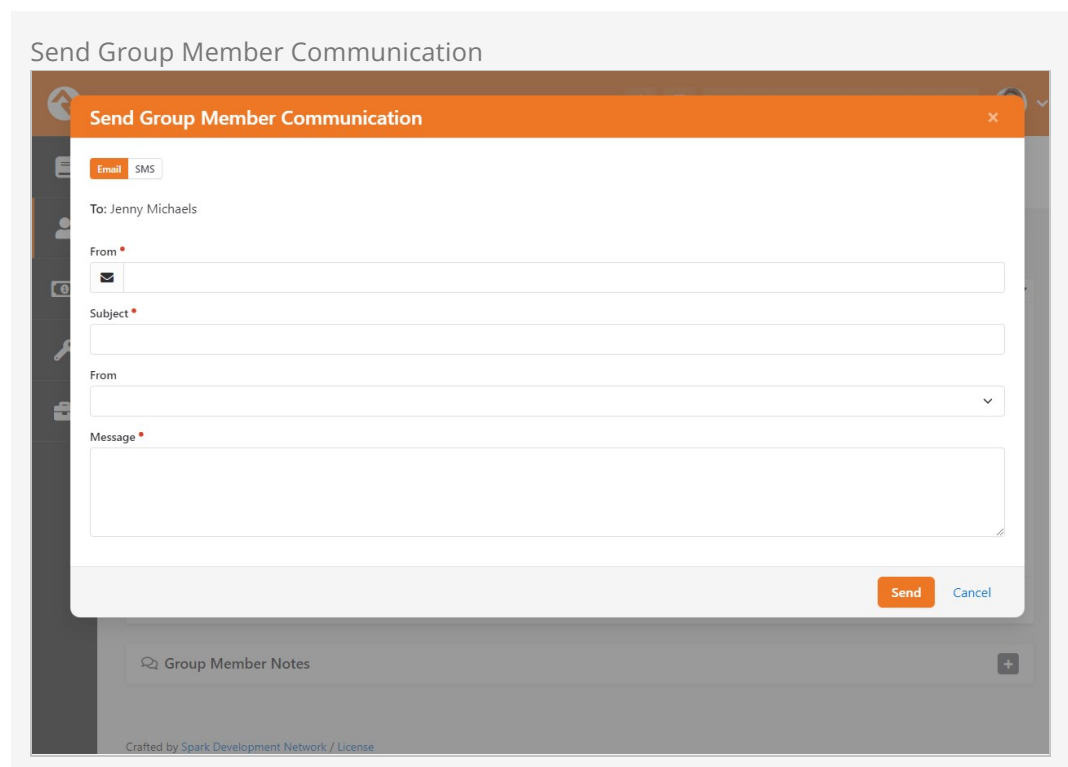
## 9 Group Member Notes

Here you can track notes about the group member. These can optionally stay with the group member if they are moved to a different group.


As pictured above, you'll see a note field for the group member. This is useful for keeping basic notes. Rock uses this field to provide specific information about the group member when processing things like workflows and alternate placements.

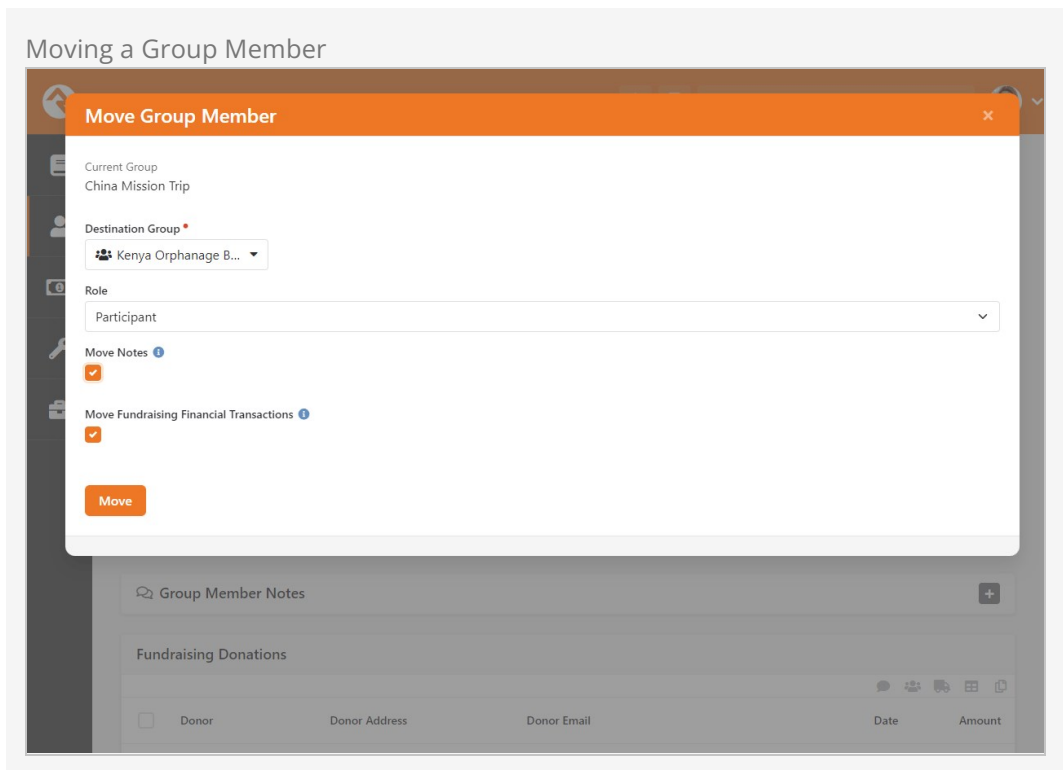
If a group member has a note attached, a small note icon  will display on the group member list to help identify this fact.

As noted above, you can send a quick communication to the group member from the group member detail screen by clicking the  icon. You can send either an email or an SMS text message. This is best used when you just want to send a quick note to a single group member.



## Moving Group Members

From the Group Member Detail screen discussed above, it's also possible to move a group member from one group to another by clicking the  icon. When you do, you'll be given the option to transfer any group member notes to the new group. If you're working with Fundraising Groups you'll also see an option to move donations to the new fundraising opportunity.



If the group member's current group and the destination group share group member attributes with the same key, then those attributes will be retained. Otherwise, when the group member is moved, the member's attribute information will be lost.

## Group Member Workflows

By now you realize that groups are the backbone of Rock. So, it makes sense that we'd invest in making them as powerful as possible. Group Member Workflows are one of these investments. So, what do they do?

Group Member Workflows are an easy way to trigger workflows to launch when the state of a group member changes for a specific group. These events include:

- Being added to a group
- Being removed from a group
- Member status changes (e.g., status changed from *Pending* to *Active*)
- Member role changes (e.g., role changed from *Attendee* to *Leader*)
- Member attendance
- Member alternate placements (discussed in detail in the next chapter)

The workflows you define for these triggers can be configured for all groups of a specific type under:

`Admin Tools > General Settings > Group Types` or for a specific group under `People > Group Viewer > Group`. Below is the screen you'll see in either case. Note that workflows for a specific group can only be added if *Allow Specific Group Member Workflows* is enabled for the Group Type.

## Required Access

You must have *Administrate* access to a group to be able to configure Group Member Workflows.

### Group Member Workflow Settings

#### Add Trigger

Name \* 1  
Member Added to Group

Start Workflow 3  
⚙️

Active 2

When \* 4  
Member Added To Group

With Status of 5  
Active

With Role of 6  
Member

Save Cancel

#### Add Trigger

Name \*  
Member Status Changed

Start Workflow 3  
⚙️

Active

When \*  
Member Status Changed

From Status of 7  
Pending

To Status of 8  
Active

Save Cancel

#### Add Trigger

Name \*  
Member Role Changed

Start Workflow 3  
⚙️

Active

When \*  
Member Role Changed

From Role of  
Member

To Role of  
Leader

Save Cancel

#### Add Trigger

Name \*  
Member Attended Group

Start Workflow 3  
⚙️

Active

When \*  
Member Attended Group

9 First Time 3  
 Yes

Save Cancel



- 1 **Name**  
This is the name you want to use to describe the trigger.
- 2 **Active**  
Indicates whether this trigger is currently active.
- 3 **Start Workflow**  
The workflow type you'd like to start when the trigger conditions are met.
- 4 **When**  
This determines when the trigger should be considered.
- 5 **With Status Of**  
This allows you to filter when the trigger is applied for members with a specific status.
- 6 **With Role Of**  
This allows you to filter when the trigger is applied for members with a specific role.
- 7 **From Status/Role Of**  
Determines what the original status/role was to use as a trigger filter.
- 8 **To Status/Role Of**  
Determines what the new status/role must be for the trigger to fire.
- 9 **First Time**  
Determines if this trigger should only be activated the first time a person attends this group, or every time.

See our [Blasting Off With Workflows](#) guide for more information on working with workflows.

## Tips For Creating Triggered Workflows

When workflows are started from the group member triggers, they will pass in a few attributes for your convenience (as long as the attributes are defined). These include:

- **Person:** The person that the group member represents.
- **Group:** The group that the person is a member of.
- **AttendanceDateTime:** Only applies to the Member Attended Group trigger type and is the date/time that person attended the group.

### Be Persistent

Make sure the triggered workflow is *Automatically Persisted*. This will ensure it works correctly and as intended.

Whenever possible, the workflow will also pass in the *Group Member* model as the entity of the workflow. You can access the group member properties and attributes by using the *Attribute Set From Entity* action combined with Lava like the following:

```
{{ Entity | Attribute:'HasBook' }}  
{{ Entity.GroupMemberStatus }}  
{{ Entity.GroupRole.Name }}  
{{ Entity.PersonId | PersonById | Property:'PrimaryAlias' | Property:'Guid' }}
```

### When Group Member Won't Be Passed

Some member workflow triggers won't pass the group member as the entity. For instance, for the *Member Removed from Group* and *Alternate Placement* workflow types there won't be a group member left to pass when these events are launched.

# Alternate Placements

In some group usage scenarios, you may want group leaders to be able to remove someone from their group but not have the group member fall to the wayside. Alternate placements allow you to do just that.

The first step is to configure the group type to have an alternate placement group member workflow. We discussed creating these workflows in the previous chapter. The *Member Placed Elsewhere* workflow trigger type has two options: *Show Note* and *Require Note*. This allows the group leader to notate the reason why they are seeking to place the group member elsewhere.

## Configuring an Alternate Placement Workflow

The screenshot shows the 'Group Type Detail' configuration page for a 'Small Group'. The page has a dark sidebar on the left with icons for home, user, group, settings, and a menu. The main content area is titled 'Group Type Detail' and includes a breadcrumb trail: 'Home > General Settings > Group Types > Small Group'. The configuration is organized into several sections, each with a dropdown arrow:

- Small Group** (selected)
- Name**: A text input field containing 'Small Group'.
- Description**: A text area containing 'A group of people who share an interest and meet together with regular frequency.'
- General**
- RSVP**
- Attendance / Check-in**
- Scheduling**
- Roles**
- Member Attributes**
- Group Attributes**
- Group Type Attributes**
- Group Requirements**
- Group Member Workflows**: This section is expanded to show a table of workflows.
- Display Options**

At the bottom of the configuration area are 'Save' and 'Cancel' buttons. A footer note reads 'Crafted by Spark Development Network / License'.

Name	Workflow	When	Active
Alternate Placement	Alternate Placement	Member Placed Elsewhere	✓ ✎ ✕

The *Group Member Detail* screen contains a button that allows you to initiate an alternate placement workflow. When you click this button, Rock displays the *Move Group Member* window, where you can select which configured workflow to launch (if there is more than one) and allow the leader to enter a note (if it's configured to do that).

## Alternate Placement Button

The screenshot shows a web application interface for managing group members. The top navigation bar is orange and contains a home icon, notification bell, search icon, and a user profile dropdown. The main content area is titled "Group Member Detail" and shows the details for "Jenny Michaels", who was added on 10/18/2018. The form includes fields for "Person" (Jenny Michaels), "Role" (Member), "Note" (empty text area), "Notified" (checkbox), "Member Status" (radio buttons for Inactive, Active, Pending), and "Communication Preference" (radio buttons for No Preference, Email, SMS). There are "Save" and "Cancel" buttons at the bottom of the form. Below the form is a "Group Member Notes" section with a search icon and a plus sign. The footer of the page reads "Crafted by Spark Development Network / License".

## Alternate Placement

The screenshot shows a "Move Group Member" dialog box overlaid on the "Group Member Detail" page. The dialog box has an orange header with a close button. It contains the following information: "Current Group" is "China Mission Trip"; "Destination Group" is "Kenya Orphanage B..."; "Role" is "Participant"; "Move Notes" is checked; and "Move Fundraising Financial Transactions" is checked. There is a "Move" button at the bottom of the dialog. Below the dialog, the "Group Member Notes" and "Fundraising Donations" sections are visible. The "Fundraising Donations" section shows a table with columns for Donor, Donor Address, Donor Email, Date, and Amount.

When the `Move` button is clicked, the workflow is launched, and the person is removed from the group.

## Tips For Creating Triggered Workflows

When workflows are started from the group member triggers, they will pass in a few

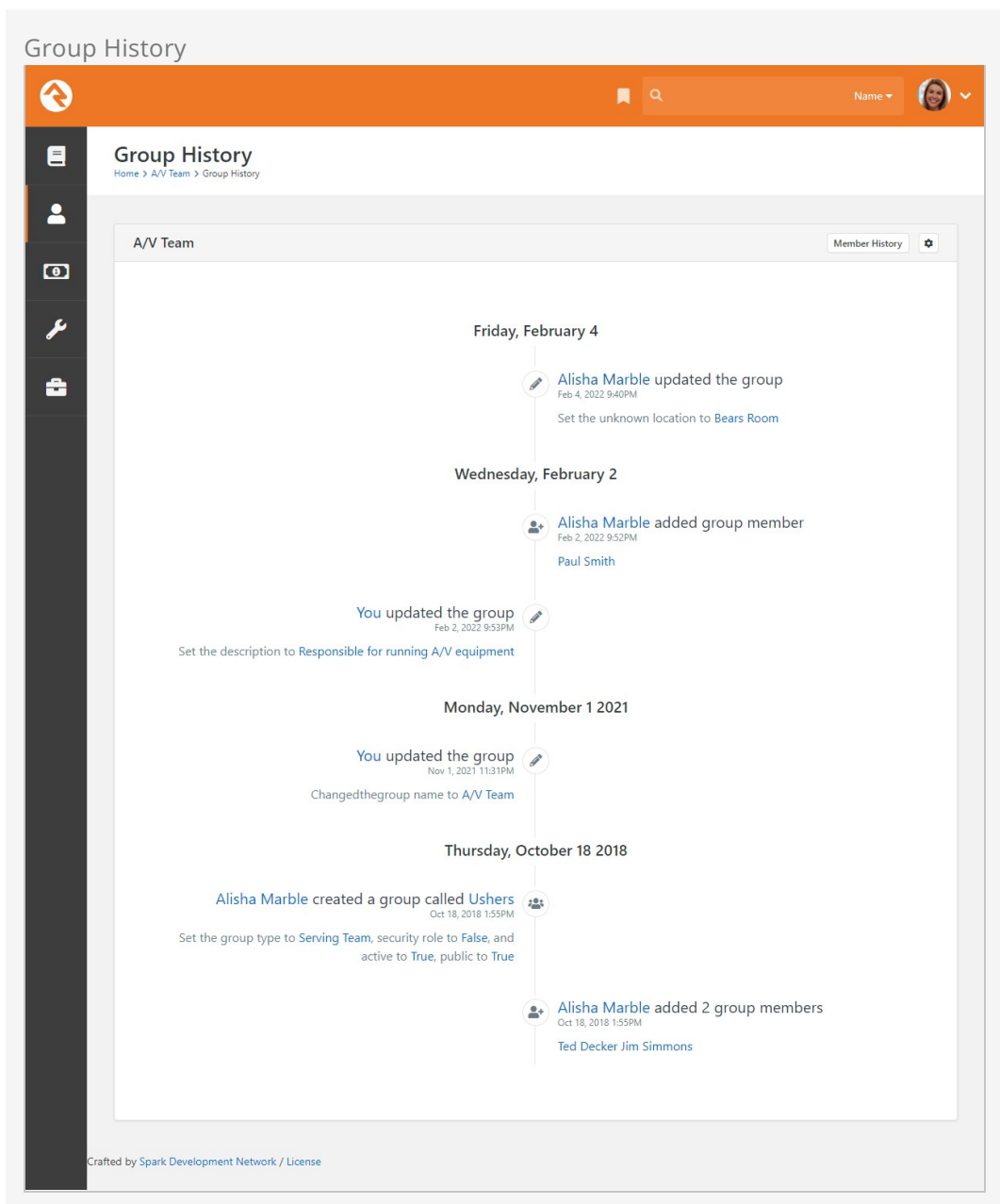
attributes for your convenience. These include:

- **Person:** The person that the group member represents.
- **Group:** The group that the person is a member of.
- **Note:** The note that was entered by the group leader.
- **Group Member Status:** The status that the group member was when the workflow was launched.
- **Group Member Role:** The role name of the group member when the workflow was launched.
- Any attributes that match those of the group member attributes configured for the group.

# Group History

As you work with groups—adding and removing members, adjusting schedules and member roles, etc.—there may be times when you want to get a 40,000ft view to see how they're doing. Rock's Group History feature allows you to do just that.

Group History takes all of the configurations and changes made to a group and compiles them into timeline and table views that let you easily view the life and health of that group. Here's an example of a Group History timeline view.



Rock ships with Group History enabled for small groups and serving groups. You can enable and disable Group History for any group type. However, because a lot of data can build up quickly, we recommend using it only with your more regular, stable groups. For example, enabling Group History for a Sunday School group where different children are in attendance each week would lead to crowded (and potentially messy) timelines and tables. Enabling it for a security team or other serving group that experiences fewer fluctuations makes a lot more sense.

OK, let's take a closer look at how to set up and use Group History.

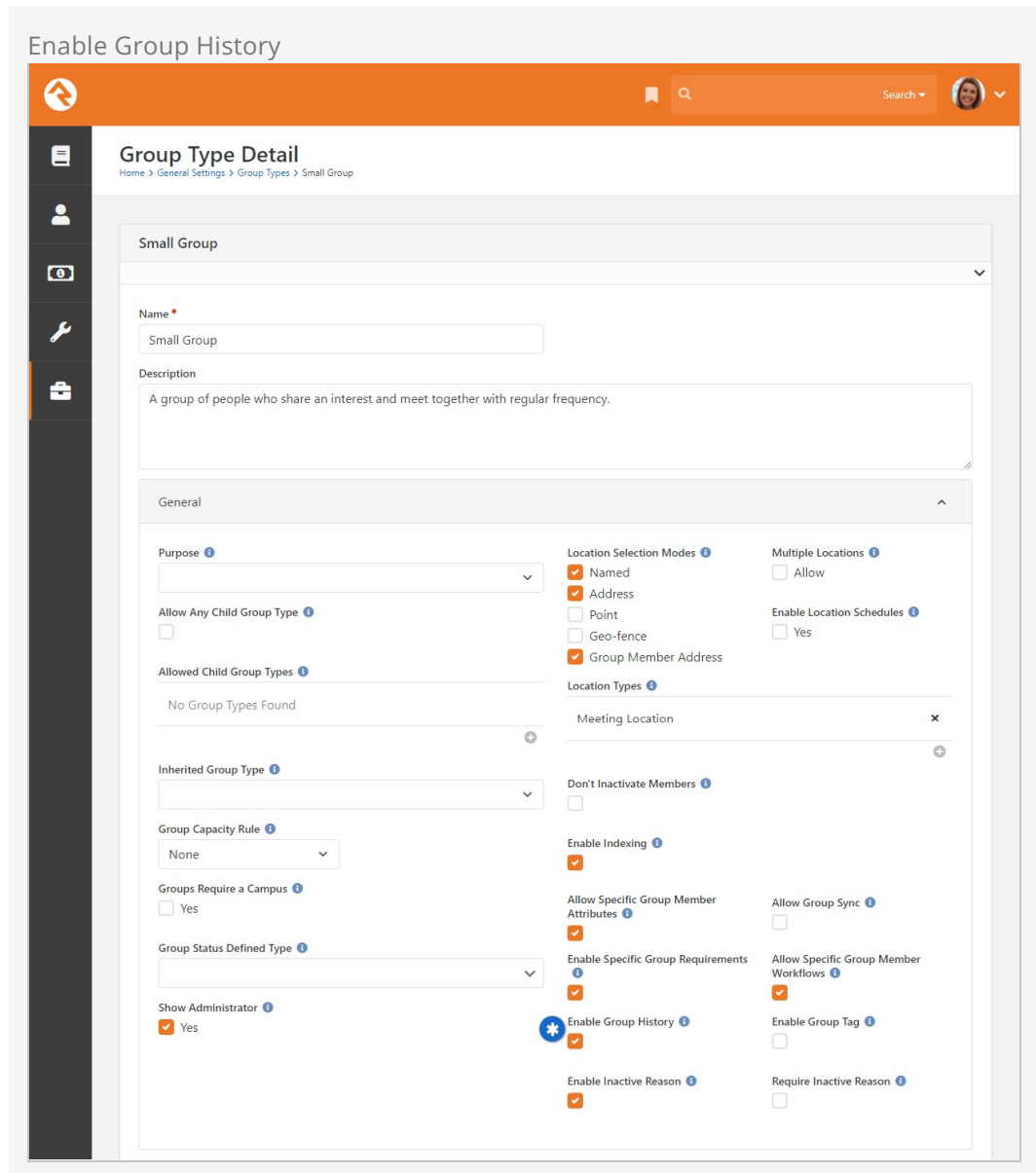
## Enable Group History

To enable Group History for all groups of a certain group type, begin by locating the group type in:

Admin Tools > General Settings > Group Types .

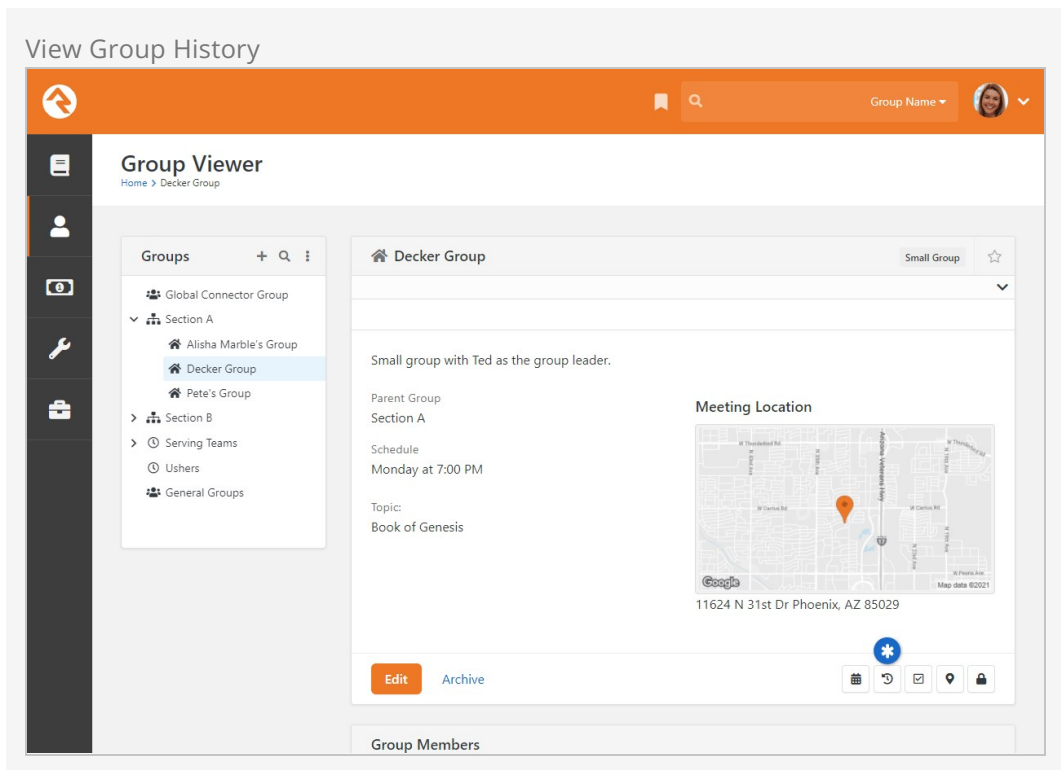


In the *General* section of the *Group Type Details* screen, check the *Enable Group History* checkbox. You can customize the group type's display options in the *Display Options* section by assigning it a color and icon. These options come into play in a number of the Group History views, but we'll get into that later. For now, click `Save` and Rock will enable the history and options for that group.



## View Group History

Now that you have Group History enabled, you can jump to that 40,000ft view. Locate the group in the Group Viewer and click the `📄` button.





### Archived Groups

You can Archive a group instead of deleting it. Archiving removes the group from the Group Viewer and other places where groups can be seen but allows you to restore it later. When a group has been marked as Archived and you want to bring it back go to: [Admin Tools > General Settings > Archived Groups](#). Click on the  icon to unarchive the group.

Note: If a group type has 'Enable Group History' checked, once the 'Process Group History' job runs the 'Archive' button will be enabled on a group.

This brings up the group's timeline view, shown earlier, including both member and group history information. The Group History screen shows the history of the group by day for the lifetime of that group. Each event on the timeline has an icon that corresponds to a type of action.

- - Member added
- - Member removed
-  - Group edited
-  - Other/general group action

If there is more information than space available for an event on the timeline, you can view the entire contents by hovering your mouse over the text. For multiple occurrences on the same day, Rock will display a link to expand the area to display all of the actions for that day.

To hide member history and view only actions made on the group level, click the .

button.

You can also zoom in from that 40,000ft view and get a closer look at the history of the members of a group. Click [Member History](#) to display a group's members and the history/dates of their involvement in the group. Click on a specific person to view a timeline of their involvement with the group.

The screenshot shows a web interface titled "Group Member History". At the top, there is an orange navigation bar with a home icon, a search bar, and a "Group Name" dropdown menu. Below this is a dark sidebar with icons for home, user profile, notifications, settings, and a briefcase. The main content area is titled "Group Member History" and includes a breadcrumb trail: "Home > Decker Group > Group History > Group Member History". The main heading is "Decker Group | Historical Group Members". Below this is a "Filter Options" dropdown and a table with the following columns: "Name", "Date Added", "Date Removed", "Last Role", and "Last Status". The table contains four rows of data:

Name	Date Added	Date Removed	Last Role	Last Status
Ted Decker	9/5/2021		Leader	Active
Cindy Decker	9/5/2021		Member	Active
Alisha Marble	10/18/2021		Member	Active
Bill Marble	10/18/2021		Member	Active

At the bottom of the table, there are pagination controls showing "50", "500", and "5,000" options, along with the text "4 Group Members". The footer of the page reads "Crafted by Spark Development Network / License".


## View Group History in a Person's Profile Page

Individual group history is also available on the *Person Profile*, under the *Groups* tab.

## Group History in Person Profile

The screenshot displays the 'Group History' section for Ted Decker. At the top, there's a navigation bar with tabs for Profile, Extended Attributes, Steps, Groups (selected), Documents, Contributions, Benevolence, and More. Below the navigation, Ted Decker's profile is shown with a photo, name, and role (Member, Main Campus). A summary bar indicates 0 / 16, 9 JT, and Today. The main area features a 'Group History' timeline for 2021, with months from May to May. Below the timeline are 'Group Types' (Serving Team, Small Group) and a 'Group List' table. The table has columns for Name, Group Type, Description, Role, and Added. It lists five groups: A/V Team (Serving Team, Member, 3 Years Ago), China Mission (Fundraising Opportunity, Participant, 22 Hours Ago), Decker Group (Small Group, Leader, 3 Years Ago), Fundraising (Fundraising Opportunity, Participant, 31 Minutes Ago), and Members and Attendees (Communication List, Recipient, 17 Months Ago). A 'Schedule Toolbox - Ted Decker' section shows three events for 8/20/2022 and 8/21/2022, with 'Confirmed', 'Decline', and 'Accept' buttons. An 'Actions' panel includes 'Schedule Unavailability', 'Update Schedule Preferences', and 'Sign-Up for Additional Times'.

Name	Group Type	Description	Role	Added
A/V Team	Serving Team		Member	3 Years Ago
China Mission	Fundraising Opportunity		Participant	22 Hours Ago
Decker Group	Small Group	Small group with Ted as the group leader.	Leader	3 Years Ago
Fundraising	Fundraising Opportunity		Participant	31 Minutes Ago
Members and Attendees	Communication List		Recipient	17 Months Ago

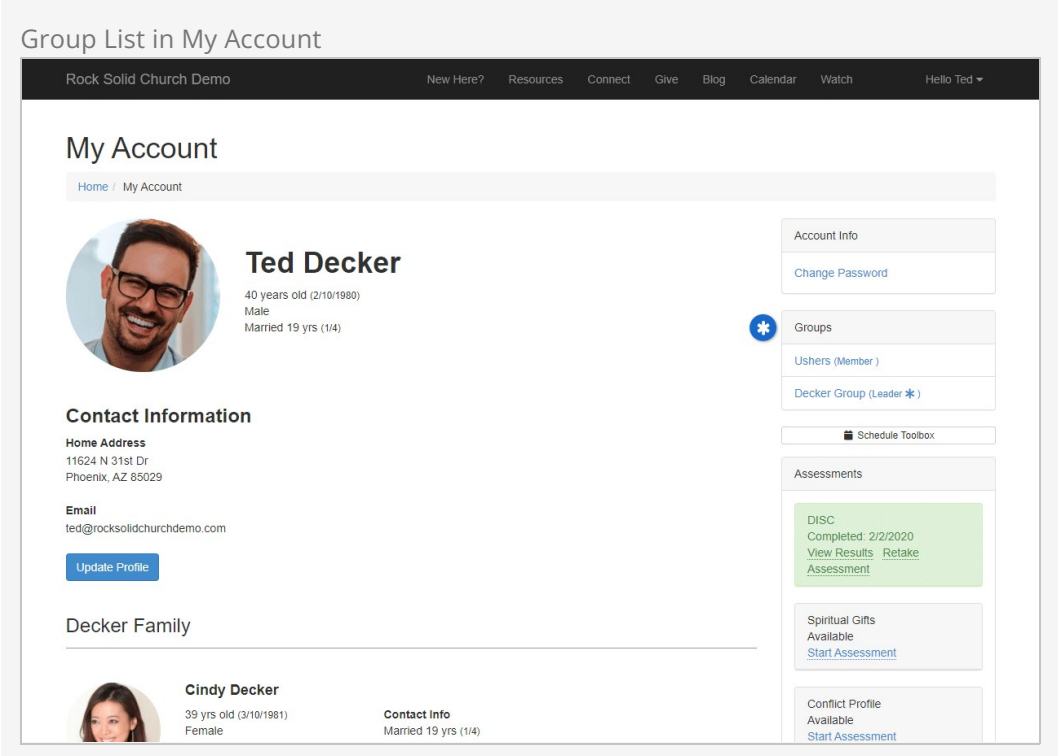
Hover your mouse over any of the events on the person's timeline to display the details of that event. Note the timeline colors correspond to the color assigned to the group back when Group History was enabled. If the person is a group leader, the color will be slightly darker. You can also click on a specific event to drill down into the group. As with all of the tabs on the *Person Profile*, the information is filterable. Click the  button to display the filter options.

# Group Leader Toolbox

The group leader toolbox can be found on the external site under *My Account*. The toolbox is made up of just a couple of pages and blocks that provide a ton of options. The out-of-the-box configuration is meant more as a sample of what's possible rather than a *one size fits all* model. Let's look at each of the blocks in detail to give you an idea of what you can achieve.

## My Account - Groups

Along the right of the *My Account* page is a listing of groups to which the person belongs. The individual can also see their role within the group. Through block settings you can configure which group types to show or hide. Using Lava, you can adjust the look of this block to your heart's content.



The screenshot displays the 'My Account' page for 'Rock Solid Church Demo'. The user profile for Ted Decker is shown, including his photo, name, age (40), gender (Male), and marital status (Married 19 yrs). Contact information such as home address and email is also visible. Below the profile, the 'Decker Family' section lists Cindy Decker. On the right side, a 'Groups' section lists 'Ushers (Member)' and 'Decker Group (Leader \*)', with a star icon next to the leader role. Other sections include 'Account Info', 'Assessments' (with a completed DISC assessment), and 'Spiritual Gifts'.

Clicking on any group in which the person is a leader will open the group leader's toolbox.

## Group Toolbox

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

---

## Group Toolbox

Home / My Account / Group Toolbox

Groups

- Ushers (Member)
- Decker Group (Leader ✱)

Your communication preference: [Email](#) [SMS](#)

### Decker Group

Small group with Ted as the group leader.

**Group Details:**

**Topic:** Book of Genesis

**Leaders:**

- Ted Decker (Leader)

[Edit](#)

Roster
Attendance

#### Active Members

**Cindy Decker** (Member)

(623) 555-3323 (Home)

(623) 555-3323 (Mobile)

11624 N 31st Dr Phoenix, AZ 85029

[cindy@fakeinbox.com](mailto:cindy@fakeinbox.com)

**Ted Decker** (Leader)

(623) 555-3322 (Home)

(623) 555-3322 (Mobile)

(623) 555-2444 (Work)

11624 N 31st Dr Phoenix, AZ 85029

[ted@rocksolidchurchdemo.com](mailto:ted@rocksolidchurchdemo.com)

**Alisha Marble** (Member)

(623) 555-2444 (Work)

3002 W Lupine Ave Phoenix, AZ 85029

[alisha.marble@rocksolidchurchdemo.com](mailto:alisha.marble@rocksolidchurchdemo.com)

**Bill Marble** (Member)

3002 W Lupine Ave Phoenix, AZ 85029

[bill.marble@fakeinbox.com](mailto:bill.marble@fakeinbox.com)

+ Add Member
Email Roster

Powered by: [Rock RMS](#) 3120 W Cholla St Phoenix, AZ 85029

This is the money block. With this block, you have access to every detail of a group that's accessible in a Lava template. It also has some special *Postback Commands* that allow you to enable editing of the group details and its members. If enabled in the block settings, you can even allow individuals to set their communication preference for the group. The sky is really the limit when it comes to customizing the look of this block.

### Note on Security

When adding a person to the group the default view allows you to select the new individual from those already in the database. In order for this search to work you will need to adjust the security on the API/People/Search REST endpoint. You can find this under:

Admin Tools > Security > REST Controllers > People

If you would prefer not to allow group leaders to search the list of people in the database, you can provide an alternate *Group Member Add Page* in the block settings. On this new page you may choose to set up a workflow entry form, a group registration block or a simple email form.

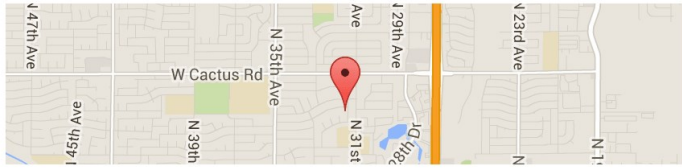
## Group Attendance List and Detail

# Group Attendance List

## Group Attendance

Home / My Account / Group Toolbox / Group Attendance

- Groups
- Decker Group (Member)
- Marble Group (Leader ✱)



### Marble Group

A general Bible study group perfect for people who are new to Christianity. We meet near W Cactus and 31st Ave.

Group Details:

Leaders:

Topic: General Bible Study

- Bill Marble (Leader)

Edit

Roster Attendance

Filter Options

Enabled Filters

Date Range: 12/17/2019 to 2/4/2020

Date	Location	Schedule	Attendance Entered	Didn't Meet	Attendance Count	Percent Attended	Notes		
1/28/2020		Tuesday at 6:00 PM	✓		9	75 %		☒	✕
1/21/2020		Tuesday at 6:00 PM	✓		12	100 %		☒	✕
1/14/2020		Tuesday at 6:00 PM	✓		9	75 %		☒	✕
1/7/2020		Tuesday at 6:00 PM	✓		10	83 %		☒	✕
12/31/2019		Tuesday at 6:00 PM	✓	✓	0	0 %	Didn't meet due to New Year's Eve holiday.	☒	✕
12/24/2019		Tuesday at 6:00 PM	✓		11	92 %		☒	✕
12/17/2019		Tuesday at 6:00 PM		✓	0	0 %		☒	✕

50 500 5,000 7 Occurrences

# Group Attendance Entry

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

## Group Attendance Detail

Home / My Account / Group Toolbox / Group Attendance / Group Attendance Detail

Groups

- Decker Group (Member)
- Marble Group (Leader\*)













### Marble Group Attendance

**Attendance For**  
Tuesday, April 25, 2023

**Schedule**  
Tuesday at 6:00 PM

We Did Not Meet

All   Present 9   Search   Add Note

 <b>Harper, Jack</b> Member	 <b>Jones, Will</b> Member	 <b>Marble, Alisha</b> Member
 <b>Marble, Bill</b> Leader	 <b>Michaels, Jenny</b> Member	 <b>Peterson, Becky</b> Member
 <b>Peterson, Brian</b> Member	 <b>Sweeney, James</b> Member	 <b>Sweeney, Nancy</b> Member
 <b>Tennant, Rob</b> Member	 <b>Tennant, Sheryl</b> Member	 <b>Tucker, Dale</b> Member

Back

Powered by: Rock RMS    3120 W Cholla St Phoenix, AZ 85029-4113

These two blocks allow you to track the attendance of a group. By default, these options will only show for groups of a type with attendance enabled.



# Group Finder

The group finder is another very powerful block that allows your website visitors to search for a group and register quickly. The group finder has been configured on the external website under [Connect > Small Groups](#).

If configured in the block settings, it allows for searching by the day of the week that the group meets and the study topic. Selecting your criteria and clicking [Search](#) returns all of the groups that match those criteria. From there you can choose to register for a group.

## Public Groups

Only groups that are marked as [Public](#) can be viewed in the group finder. You can change the public setting by editing the group.



**Day of Week Filter Label** 1 \*

**Time of Day Filter Label** 1 \*

**Campus Filter Label** 1 \*

**Campus Types** 1

Online  Physical

**Campus Statuses** 1

Closed  Open  Pending

**Display Day of Week Filter** 1 6

None  Single-Select Dropdown  Multi-Select Checkboxes

**Display Time of Day Filter** 1 7

Yes

**Display Campus Filter** 1 8

Yes

**Enable Campus Context** 1 9

Yes

**Display Attribute Filters** 1 10

Topic (Small Group)

**Map**

**Show Map** 1 12

**Map Style** 1

Google Standard

**Map Height** 1

600

**Map Marker** 1 13

**Marker Color** 1

**Minimum Zoom Level** 1 14

**Maximum Zoom Level** 1

**Initial Zoom Level** 1 15

Automatic

**Marker Auto Scale Zoom Level** 1 16

**Marker Auto Scale Amount** 1

1

**Location Precision Level** 1 17

Precise

**Group Window Contents** 1 18

```

1 <h4 class="margin-t-none">{{ Group.Name }}</h4>
2
3 <div class="margin-b-sm">
4   {% for attribute in Group.AttributeValues %}
5     <strong>{{ attribute.AttributeName }}:</strong> {{ attribute.ValueFormatted }} <br />
6   {% endfor %}
7 </div>
8
9 <div class="margin-v-sm">
10  {% if Location.FormattedHtmlAddress and Location.FormattedHtmlAddress != '' %}
11    {{ Location.FormattedHtmlAddress }}
12  {% endif %}
13 </div>
14

```

[Additional Geofence Settings](#)

**Lava**

**Show Formatted Output** 1 19

Yes

**Lava Template** 1

**Grid**

**Show Grid** 1 20

Yes

**Show Schedule** 1

Yes

**Show Description** 1

Yes

**Show Member Count** 1

Yes

**Show Average Age** 1

Yes

**Include Pending** 1

Yes

**Show Campus** 1

Yes

**Show Distance** 1

Yes

**Sort by Distance** 1

Yes

**Page Sizes** 1

**Show Attribute Columns** 1

Topic (Small Group)

**Linked Pages**

**Group Detail Page** 1 21

**Register Page** 1 22

Group Registration

### 1 Group Type

Start by choosing the Group Types you would like to be available through the group finder.

### 2 Hide Overcapacity Groups

If the group is full, then you may not want to show it in the Group Finder. This setting lets you hide groups that have reached (or exceeded) their maximum capacity.

### 3 Load Results on Initial Page Load

When this is enabled, a person coming to the page will see the group map and the available groups, even though they haven't searched for anything yet. When this is disabled, the person needs to do a search before the map and groups become visible. This only applies if you've enabled filters the person can search on, like *Day of Week* or *Campus*. See below points for more details.

### 4 Geofence Group Type

Some organizations may want to limit the results to certain geofenced areas that are close to an address that is provided during the search. For instance, some churches with neighborhood ministries may only want to show groups that meet in a person's neighborhood. These churches would create a group type to manage these *neighborhoods*, each as a group of that type. Selecting this group type would then prompt the user to enter their address as part of the search criteria. This address would be used to determine which neighborhood geofence they live in so that only groups in that fence are displayed.

Below the Geofence Group Type selector, you have options for changing what your filters are called.

### 5 Location Types

You can filter groups by Location Type, to show only groups with locations of a certain type. For instance, you might only want to show groups with a Location Type of *Meeting Location*. You can set a Location Type for each Group Type individually.

### 6 Display Day of Week Filter

If your groups have a "weekly" type schedule, you can offer people either a single-select or a series of checkboxes they can use to find groups which meet on the day they choose.

### 7 Display Time of Day Filter

If your groups have a "weekly" type schedule, you can offer people the ability to filter for groups meeting at a specific time. They can choose  5:00pm to find groups which meet in the evening, for instance.

### 8 Display Campus Filter

Allows people to filter the list of groups according to the campus they belong to.

### 9 Enable Campus Context

Configures the block to automatically filter for groups belonging to a

specific campus, if you've set the Campus Context for the page.

#### 10 **Display Attribute Filters**

Allows you to choose which Group Attributes people can filter the list by. The same attribute must exist on all of the selected group types in order to be used as a filter.

#### 11 **Campus Type/Status**

You can restrict which campuses are available for selection by limiting them to certain types or statuses. For instance, this would be helpful if you only want to list *Physical* campuses that are *Open*.

#### 12 **Show Map**

This section allows you to display or hide the map on which the filtered groups will be shown. You can also choose the Map Style and size (Map Height).

#### 13 **Map Marker**

You can change the style of the markers that appear on the map. Options include:

- Pin
- Marker
- Marker With Dot
- Circle

You can also change the color of the markers by updating the *Marker Color*.

#### 14 **Min/Max Zoom Level**

You can use the Minimum and Maximum Zoom Level settings to control exactly how far a person can zoom in or out on the map. These settings help people find groups within a reasonable area, while giving you the option to not let them zoom in to a specific house or building.

#### 15 **Initial Zoom Level**

This controls the zoom level on the map when the page is loaded. You might set it to something like *10 - City* to give a wider view of all the available groups.

#### 16 **Marker Auto Scale Zoom Level/Amount**

These settings relate to the markers on the map. For instance, if your map can be zoomed in to the Building level, you can set the Marker Auto Scale Zoom to the Street level. This would mean that the person can zoom the map in to see buildings, but the marker would still be at the street level. This gives some ambiguity to the exact location of the group, which can be good for privacy if it's a person's house.

#### 17 **Location Precision Level**

This is another setting to help mask the exact location of a group, which you might want to do if it's a person's home. This determines how precise of a latitude/longitude to provide to the map. The options include:

- Precise
- Narrow
- Close
- Wide

#### 18 **Group Window Contents**

The HTML and Lava used to display a pop-up window on the map when a

group is clicked. By default, it will show the group name, location, attributes, a link to the Group Detail Page (if configured) and a link to the Register Page (if configured).

#### 19 Lava: Show Formatted Output

Allows you to configure your own output based on the groups matching the filters. If you enable both the Lava and grid, the Lava results will be shown above the grid. Your Lava will have access to an array called Groups which you can loop through to display groups matching the filters. See our [Lava](#) documentation for more information.

#### 20 Show Grid

Configures whether the grid (table) of groups will be displayed once filters are chosen. If it's shown, you can also configure whether other information about each group is included in the grid, such as the Schedule, Description, Member Count, Average Age (of members), the Campus, the distance from their address, and whether the groups are sorted according to how close they are to the person's address. You can also choose how many groups are shown on each page and which Group Attributes you'd like to display in the grid.

#### 21 Group Detail Page

Specifies a page the person will be taken to if they ask for more details about a group. This page is available to your Lava using the `LinkedPages.GroupDetailPage` object

#### 22 Register Page

Specifies a page the person will be taken to if they click the "Register" button. This page is available to your Lava using the `LinkedPages.RegisterPage` object

### Another Way to Use the Group Finder

If you pass a 'PersonGuid' through the page's query string you can use the group finder to register that person for a group. You can use this trick to say link from a group badge on the person profile page if they are not already in a group. This allows a staff person to quickly register them for a group without a lot of clicking around.

Consider using the Group Member Add From URL block with this feature.

## Group Registration

Registering for a group is a simple process using Rock's Group Registration block. Out-of-the-box this block will ask for basic contact information for the individual and their spouse. By adjusting the block settings, you can customize this block in several different ways. Below we'll walk through some of the common settings but be sure to review all of this block's settings to ensure it's meeting your organization's needs.

- **Mode:** There are three entry modes for the registration form.
  - **Simple:** This mode only asks for the individual's first name, last name and

email address.

- **Full:** This mode additionally asks for more contact information including home phone, cell phone and address.
- **Full With Spouse:** This mode is identical to the normal *Full* mode but adds the spouse's first name, last name, cell phone and email.
  
- **Group Member Status:** This setting determines the group member status that will be used when they are added to the group. Options include Pending, Active or Inactive.
  
- **Connection Status:** The registration form will attempt to find a matching record in the database using the first name, last name and email. If a record cannot be found, a new record will be created in the database. When that occurs, this will be the connection status that is used for these new records.
  
- **Record Status:** This represents the record status that will be used for new records. It's best to leave this as *Pending* so individuals on your data integrity team can manually review them for possible duplicates and merge the records if needed.
  
- **Workflow:** This option allows you to launch a workflow after the registration. The group member will be attached to the workflow as the Entity.
  
- **Lava Template:** This is a Lava template that will be applied to the top of the registration block. This allows you to customize the experience for the individual.
  
- **Result Lava Template:** This Lava template is used to craft a response message after the registration is completed.
  
- **Result Page:** You can optionally send the individual to a new page after the registration is processed.
  
- **Show SMS Opt-in:** Allows the person to choose whether they would like to receive text messages on their mobile number. The Options for this field may be hidden, shown for first adult or shown for all adults.

# Schedule Toolbox

In this chapter, we'll explore the power that the Schedule Toolbox puts in the hands of each volunteer. You'll learn how volunteers can easily manage their schedules, set preferences, and stay organized. From choosing serving frequencies to setting blackout dates, the Schedule Toolbox streamlines the volunteer experience, empowering individuals to contribute effectively to your organization's mission.

But before we delve into the capabilities of the Schedule Toolbox, keep in mind that it's just one part of the larger *Group Scheduling* framework. In the next chapter, we'll cover the administrative configuration and the Group Scheduler, which is how Group Scheduling is set up and managed internally. And remember, while many of the examples may revolve around weekend serving schedules, don't feel limited to that. Group Scheduling extends far beyond typical weekend service coordination. Don't be afraid to think outside the box!

For instance, Group Scheduling can be used to:

- Organize VBS staff and volunteer schedules
- Coordinate summer camp volunteers
- Set up a rotating schedule for monthly campus potlucks
- Keep youth groups on track and engaged
- Seamlessly manage special events

The Schedule Toolbox can be accessed from your public-facing website via the *My Account* page. Let's explore the details, starting with the person's Current Schedule.

## Current Schedule

The Current Schedule is exactly what it sounds like. It shows the person's currently accepted, declined and pending serving engagements. But there's more to it than just glancing at a list of dates and times. Let's break down the features in this area of the Schedule Toolbox.

Current Schedule



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

## Schedule Toolbox

Home / My Account / Schedule Toolbox

1 Add to Calendar   2 Copy Calendar Link

3 Schedule Unavailability

Sat, Mar 9th  
A/V Team - Bldg 1  
Saturday 4:30pm

5 Confirmed

Sat, Mar 9th  
A/V Team - Bldg 1  
Saturday 6:00pm

Decline   Accept

Sun, Mar 10th  
A/V Team - Bldg 1  
Sunday 9:00am

6 Decline   Accept

Sat, Mar 16th  
Ushers - Main Campus  
Saturday 4:30pm

Declined

Sat, Mar 16th  
Greeters - Main Campus  
Saturday 6:00pm

Decline   Accept

Wed, Sep 25th - Mon, Sep 30th  
All Groups

7 Unavailable

4 Actions

Current Schedule

Update Schedule Preferences

Sign Up for Additional Times

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### 1 Add to Calendar

What's more convenient than having your schedule on your own calendar? This button will automatically download a `.ics` file to your computer, which you can import into your calendar software. On mobile, this will immediately ask if you want to add it directly to your calendar.

### 2 Copy Calendar Link

This will copy a link to your calendar to your clipboard. This makes it easy to paste it directly into calendar software like Microsoft Outlook or Google Calendar.

### 3 Schedule Unavailability

This is where you can set periods when you'll be unavailable to serve, perhaps due to a vacation or schedule conflict.

### 4 Actions

Each of these buttons will direct the volunteer to a new screen where they can manage different aspects of their schedule and schedule preferences. Each of these actions are described in the following sections below. The list of available Actions can be modified by editing the block's settings.

### 5 Confirmed

Confirmed assignments can be cancelled by clicking the three dots and selecting *Cancel Confirmation*. Similarly, Declined assignments can be declined by clicking the three dots and selecting *Accept Schedule*.

### 6 Accept/Decline

Will you be able to serve in this slot? Simply click Accept or Decline for each schedule and location.

### 7 Unavailable

This indicates an assignment that occurs during a period of unavailability, which the volunteer can configure for themselves (see below screenshot).

Clicking the three dots to the right will let the person remove such assignments from the list.

The *Add to Calendar* and *Copy Calendar Link* buttons described above won't be available until you have an actual, confirmed schedule. In other words, nothing will go on your calendar if you haven't *Accepted* anything yet. Keep in mind you may need to download these files multiple times as your schedule changes.

### Block Settings

Be sure to review the settings for this block because there are a lot of them. For instance, you can change the text of buttons on the page, or you can disable some of the features entirely.

Cancelling a "Confirmed" assignment changes it to "Declined" automatically. A reason for declining will be required if the Group Type is configured to require a reason. Also, a Decline Note will appear if enabled in the block settings (both are off by default).

You may also notice that you can switch between schedulable family members on all panels of the Schedule Toolbox. Pictured below, Noah and Alex are not listed only because they do not belong to any schedulable groups.

The screenshot displays the 'Change Family Members' interface within the 'Schedule Toolbox'. The page title is 'Change Family Members' and the breadcrumb trail is 'Home / My Account / Schedule Toolbox'. The main content area shows a list of assignments for 'A/V Team - Bldg 1' on Saturday and Sunday. A 'Family Members' dropdown menu is open, showing 'Ted Decker' and 'Cindy Decker'. The page also includes navigation links, a 'Schedule Unavailability' button, and footer information.

Date	Assignment	Status
Sat, Mar 2nd	A/V Team - Bldg 1 Saturday 4:30pm	Confirmed
Sat, Mar 2nd	A/V Team - Bldg 1 Saturday 6:00pm	Declined
Sun, Mar 3rd	A/V Team - Bldg 1 Sunday 9:00am	Confirmed

Family members will appear in the *Schedule Unavailability* window (see below), even if

they're not schedulable.

## Schedule Unavailability

Next, we'll look at how to set the dates for when you're unavailable to serve. The below screen can be accessed by clicking on the *Schedule Unavailability* button from the main *Schedule Toolbox* page.

The screenshot shows a web application interface for setting unavailability. The main window is titled "Schedule Unavailability" and contains the following elements:

- 1 Date Range**: Two date pickers with a "to" separator between them.
- 2 Unavailability Notes**: A text input field.
- 3 Group**: A dropdown menu currently set to "All Groups".
- 4 Individual**: A list of names with checkboxes:  Ted Decker,  Cindy Decker,  Noah Decker, and  Alex Decker.

At the bottom right of the form are "Save" and "Cancel" buttons. The background shows a calendar grid with "Sunday 9:00am" visible.

### 1 Date Range

This is where volunteers can select dates indicating when they can't serve. This will prevent the person from being scheduled to serve on those dates.

### 2 Unavailability Notes

The person can optionally provide a description, indicating why they are unavailable for the selected dates.

### 3 Group

A volunteer can be unavailable for serving in a single group, or across all groups.

### 4 Individual

If a person is unavailable, it's often the case that others in their family are also unavailable. Here the person has the option to indicate which family member(s) are not available to serve on the selected dates.

Whoever is selected on the main Schedule Toolbox window will be at the top of the

Individual list and will be automatically selected. The list of available groups from the Group drop-down is based on this person.

## Update Schedule Preferences

The screen displayed below is accessible by clicking the "Update Schedule Preferences" button on the main *Schedule Toolbox* page. You can switch between groups by clicking on the headers at the top of the block. In block settings, you can choose to display the group's campus in these headers. If no abbreviated name is configured, the full campus name is used.

## Update Schedule Preferences

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

### Schedule Toolbox

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

[A/V Team](#) [Children's](#) [Greeters](#) [Ushers](#)

**Actions**  
[Current Schedule](#)  
[Update Schedule Preferences](#)  
[Sign Up for Additional Times](#)

- Send Reminders**  
3 days before
- Current Schedule**  
Every Week Starting On: 03/03/2024
- Assignment**  
Please select a time and optional location that you would like to be scheduled for.

Schedule	Location	
9:00 AM	Bears Room	<a href="#">✎</a> <a href="#">✕</a>
10:30 AM	No Location Preference	<a href="#">✎</a> <a href="#">✕</a>
<a href="#">+</a>		

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### 1 Send Reminders

Each volunteer can select how long before a scheduled serving time they want to receive a reminder that they're scheduled to serve. They can also choose to not be sent a reminder at all.

### 2 Current Schedule

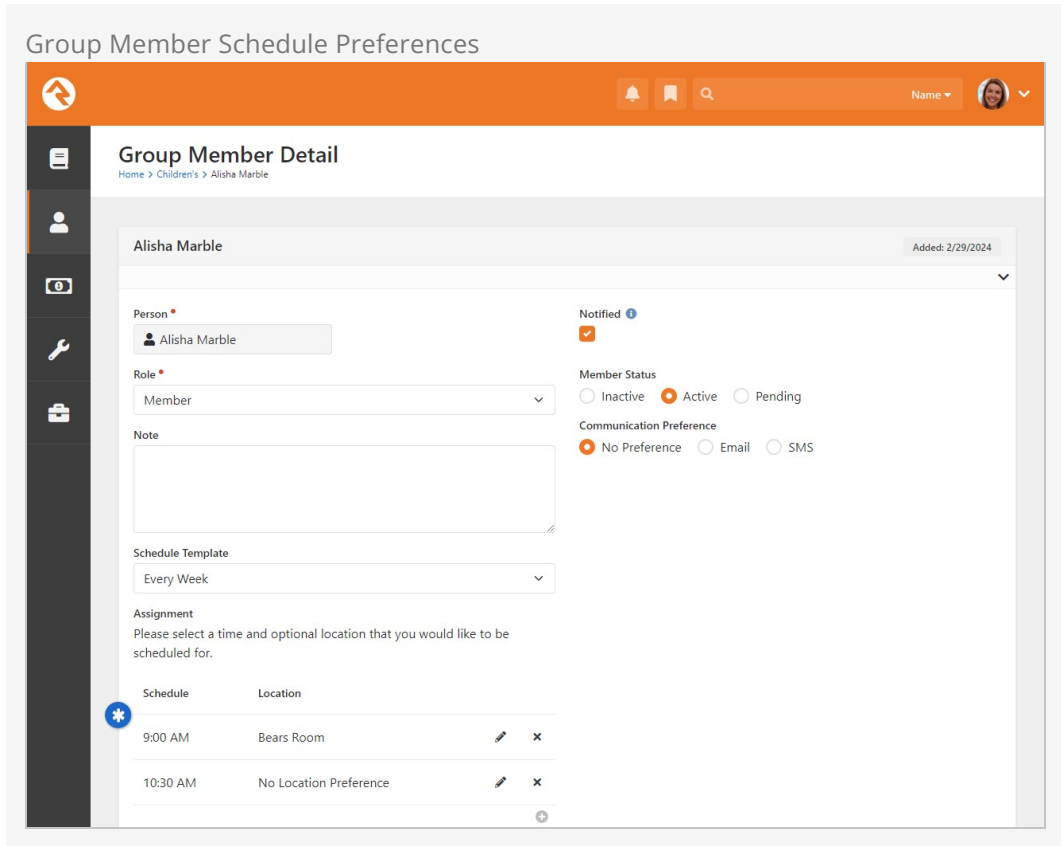
This is where volunteers can set the frequency of their serving. Options include:

- No Schedule
- Every Week
- Every Other Week
- 1st and 3rd Week
- 2nd and 4th Week

### 3 Assignment Preferences

This is where volunteers can set their preferences for when they would like to serve and where. Or, a person can choose not to select a location, indicating they don't have a location preference. Only named schedules marked as *Show Publicly* are listed. These preferences are used to Auto-Schedule volunteers.

The person's assignment preferences can also be viewed and maintained from the *Group Member Detail* page.



## Sign Up for Additional Times

The last stop on our tour of the Schedule Toolbox is the Sign-Up screen. Volunteers come here to sign up for serving opportunities that aren't currently on their schedule. This page is easy to use; all you need to do is check the box next to the serving opportunity. You may also see an option to pick a preferred location if there are multiple locations from which to choose.

# Sign Up for Additional Times

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

## Schedule Toolbox

Home / My Account / Schedule Toolbox

A/V Team    Children's    Greeters    **Ushers**

**Sat, Mar 2nd**

- 6:00 PM (2 people needed) ✓

**Sun, Mar 3rd**

- 9:00 AM (3 people needed)

**Sat, Mar 9th**

- 4:30 PM (3 people needed)
- 6:00 PM (3 people needed)

**Sun, Mar 10th**

- 9:00 AM (3 people needed)
- 10:30 AM (3 people needed)
- 12:00 PM (3 people needed)

**Sat, Mar 16th**

- 4:30 PM (2 people needed)
- 6:00 PM (3 people needed)

**Sun, Mar 17th**

- 9:00 AM (3 people needed)

**Actions**

- Current Schedule
- Update Schedule Preferences
- Sign Up for Additional Times**

## Immediate Needs

Let's take a moment to spotlight a feature called *Immediate Needs*. Here, you'll discover serving opportunities requiring volunteers immediately. How immediate? You decide by setting the time frame. With Immediate Needs enabled, urgent serving opportunities are prioritized at the top of the list, highlighted in blue. Sign up by checking the box next to the time and selecting a location if applicable.

Immediate Needs Signup

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

## Schedule Toolbox

Home / My Account / Schedule Toolbox

A/V Team   **Children's**   Greeters   Ushers

**Immediate Needs**  
This group has an immediate need for volunteers. If you're able to assist we would greatly appreciate your help.

**Sun, Mar 3rd**

9:00 AM (4 people needed)     12:00 PM (5 people needed)

**Sat, Mar 9th**

4:30 PM (5 people needed)     6:00 PM (5 people needed)

**Sun, Mar 10th**

9:00 AM (5 people needed)     10:30 AM (5 people needed)     12:00 PM (5 people needed)

**Sat, Mar 16th**

6:00 PM (5 people needed)

**Sun, Mar 17th**

9:00 AM (5 people needed)

**Actions**

Current Schedule

Update Schedule Preferences

**Sign Up for Additional Times**

No Location Preference ▾

No Location Prefere...

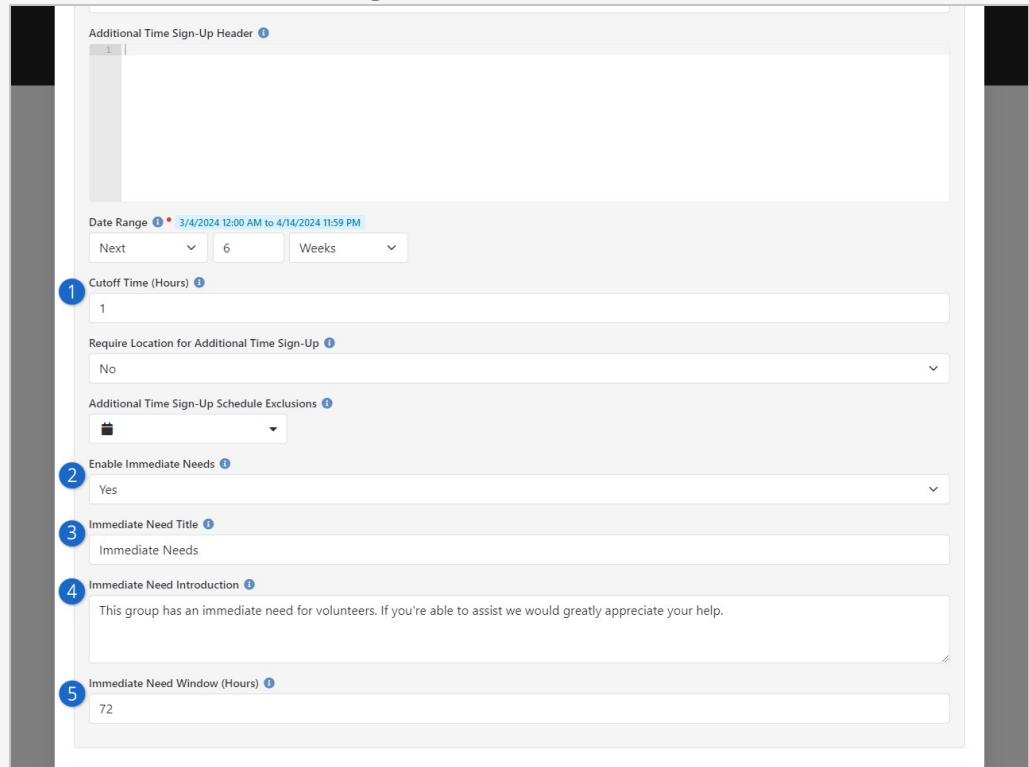
Bears Room

Bobcats Room

Immediate Needs are disabled by default but can be enabled in the block settings. There you'll also find other related settings.



## Immediate Needs Block Settings



Additional Time Sign-Up Header

1

Date Range 3/4/2024 12:00 AM to 4/14/2024 11:59 PM

Next 6 Weeks

1 Cutoff Time (Hours)

1

Require Location for Additional Time Sign-Up

No

Additional Time Sign-Up Schedule Exclusions

2 Enable Immediate Needs

Yes

3 Immediate Need Title

Immediate Needs

4 Immediate Need Introduction

This group has an immediate need for volunteers. If you're able to assist we would greatly appreciate your help.

5 Immediate Need Window (Hours)

72

### 1 Cutoff Time (Hours)

This setting affects the entire page, including Immediate Needs. It determines which serving opportunities are displayed. Those starting before the cutoff time are excluded. For instance, with a setting of "1," opportunities starting within the next hour won't appear.

### 2 Enable Immediate Needs

The settings below only apply if Immediate Needs is enabled. If it's not enabled, you won't see the Immediate Needs area on the page regardless of these settings.

### 3 Immediate Need Title

If you'd prefer to call it something besides "Immediate Needs" then you can change it here.

### 4 Immediate Need Introduction

You can stick with the provided wording or craft your own if you wish.

### 5 Immediate Need Window (Hours)

This is the other end of the *Cutoff Time* setting above. Anything that starts after this window will not be shown as an Immediate Need but will show up on the page in general as long as it's within the *Date Range* set above.

# Group Scheduling

This chapter delves into the administrative setup and management capabilities of the Group Scheduling feature. In the prior chapter we covered what volunteers are empowered to do themselves. Now, we'll show you how that all gets set up, and what Group Scheduling looks like on the administrative side.


Before starting to scheduling volunteers, you'll need to configure things like locations and schedules. Locations ensure volunteers know where they're needed, while Schedules pinpoint when their help is required. Then, the Group Scheduler is used to place volunteers into those positions at those times.

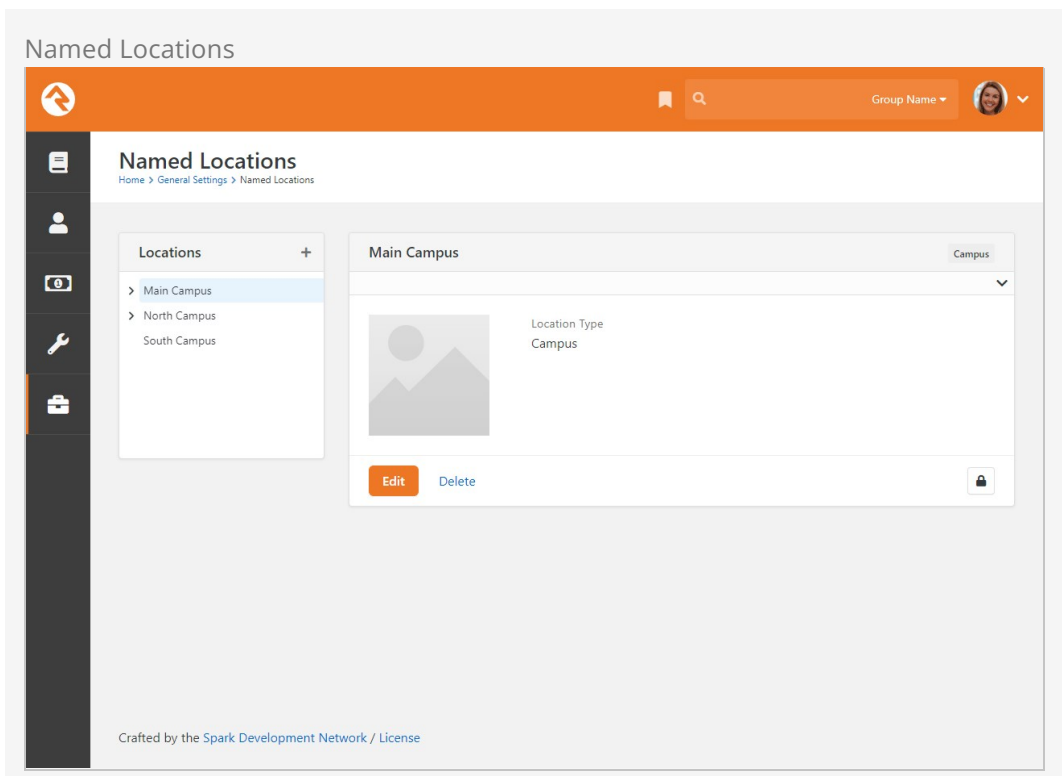
## Configuring Group Scheduling

There are two critical pieces of the puzzle you need before starting to schedule volunteers. It's simple to get these pieces because when it comes to asking for help, people are hardwired to know *when* and *where* they are needed. So, we are going to make sure our *Named Locations* and *Schedules* are configured.

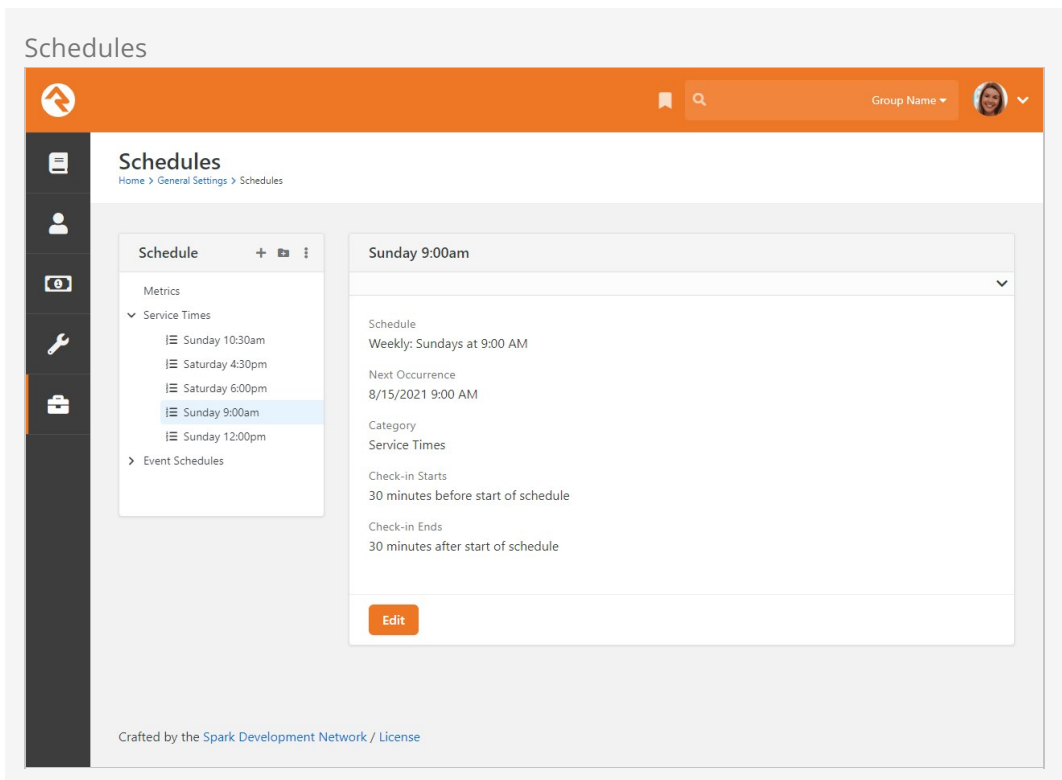
Be sure to check out the [Checking-Out Check-In](#) user guide for more detail about adding locations. For *Group Scheduler*, however, you will be adding more than rooms. Perhaps you'll be adding sections, areas or positions. These might be used to schedule specific areas of your lobby for the greeters to be stationed. Or, if you'll be using Rock to schedule your band and technical teams, add a location named 'Audio' or 'Piano' and change the location type to be a position.

### Adding Location Types

Location Types (Campus, Building, Room, etc.) are *Defined Types*. To add more, open the Defined Type *Location Type* associated with the Location category and click the  button.



Next up: schedules, also known as times. This is found in [Admin Tools > General Settings > Schedules](#). You should have a few parent groups for different types of schedules. For group scheduling, we want to make sure the times are accurate since, you guessed it, location and time are critical aspects of scheduling volunteers.



## One Schedule

It is best practice to have one schedule for each time. If you have multiple sites with the same start times, you will only need one schedule for that time.

Lastly, make sure scheduling is enabled on the Group Type. Navigate to [Admin Tools](#) > [General Settings](#) > [Group Types](#) > [Serving Team | Scheduling](#). There are additional settings you can configure for your organization. To enable, check the *Scheduling Enabled* box as pictured below.

Group Type Scheduling

Group Type Detail  
Home > General Settings > Group Types > Serving Team

Serving Team

Name  
Serving Team

Description  
Used to track groups that serve in the organization.

General

RSVP

Attendance / Check-in

Scheduling

- 1 Scheduling Enabled
- 2 Schedule Confirmation Communication  
Scheduling Confirmation Email
- 3 Schedule Cancellation Workflow
- 4 Requires Reason If Schedule Declined
- 5 Schedule Reminder Communication  
Scheduling Reminder Email
- 6 Schedule Confirmation Offset Days  
4
- 7 Schedule Reminder Offset Days  
2
- 8 Schedule Confirmation Logic  
Ask

Roles

Member Attributes

- 1 Scheduling Enabled**  
Enabling scheduling unlocks all of the scheduling features for groups of this type.
- 2 Schedule Confirmation Communication**  
Select the System Communication that you want to send to people to

confirm their schedule. Rock ships with the *Scheduling Confirmation Email System Communication* for this purpose.

**3 Schedule Cancellation Workflow**

You can optionally launch a workflow whenever a person indicates they can't make it at their scheduled time. You might use this to notify people that you're a person shorter than planned.

**4 Requires Reason If Schedule Declined**

This setting determines if a reason is required if a person says they can't attend at their scheduled time. The available reasons are stored as a Defined Type called *Group Schedule Decline Reason*.

**5 Schedule Reminder Communication**

This is the System Communication to use for sending people a reminder about their scheduled serving time. Rock ships with the *Scheduling Reminder Email System Communication* for this purpose, but you can use a custom communication if desired.

**6 Schedule Confirmation Offset Days**

This is simply the number of days before the scheduled serving time that you want to send the confirmation email.

**7 Schedule Reminder Offset Days**

This is similar to the setting described above but applies to the reminder email.

**8 Schedule Confirmation Logic**

Here you can choose to *Ask* the person if they accept their schedule, or you can have all schedules automatically accepted by choosing *Auto Accept* instead. If this is set to *Auto Accept*, then the confirmation email will only contain a Decline button.

**Changing Schedule Confirmation Logic**

Keeping in mind it should happen rarely, use caution when changing the *Schedule Confirmation Logic* setting. In some scenarios, changing this setting could result in a person who is not confirmed receiving a confirmation email with only a Decline button and no way to Accept the assignment. This typically happens when changing from *Ask* to *Auto Accept* before the person receives their confirmation email.

In the Group Type configuration pictured above, note the *Schedule Confirmation Email* and *Schedule Reminder Email* settings. These communications can be sent via email or SMS messaging.

To send these as SMS messages you'll need to be sure to have SMS messaging configured (see the [Communicating With Rock](#) guide for details) and the person needs to have an SMS enabled phone number. You'll also need to make sure the [System Communications](#) for these are configured for SMS. With all that in place, the

communication medium will be decided based on the person's group member communication preference or, if not specified there, the person's personal profile communication preference.

## Configuring Groups

We're almost to the fun part. The *Group Scheduler* requires some information from the group before it's ready. In the *Group Viewer*, add *Meeting Details* for every location that needs assigned people. This might be a pretty long list for some groups like the list we see in the screenshot below.

The screenshot displays the 'Meeting Details' page for a 'Children's' group. The interface includes a sidebar with a group tree, a main form for group details, and a table of meeting locations.

**Group Viewer**  
Home > Children's

**Groups** + Q

- Global Connector Group
- Section A
- Section B
- Serving Teams
  - Children's (selected)
  - Greeters
  - Ushers
- Ushers
- General Groups

**Children's** Serving Team North Campus

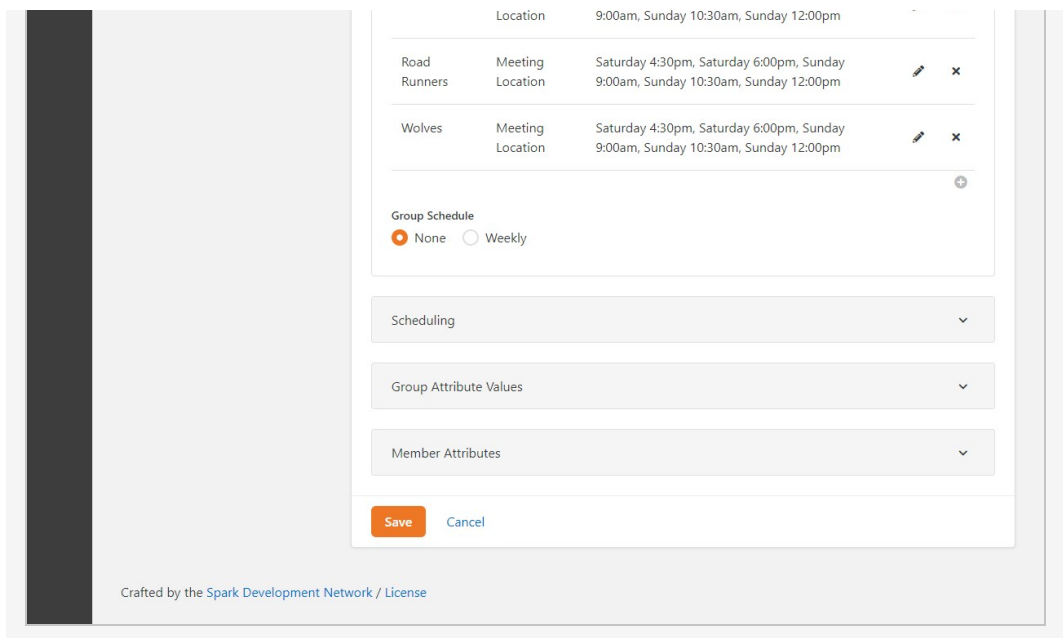
Name: Children's Active:  Public:

Description: Are responsible for teaching children.

General


**Meeting Details**

Location	Type	Schedule(s)		
Blue Jays	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Cardinals	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Deer	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Foxes	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Hawks	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Otters	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Owls	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Porcupines	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Possums	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Quails	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Raccoons	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Ravens	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		



At the end of the day, the goal for this page is to have separation and customization for each group. You can break your groups up any way that works best for your flow of work. We recommend that you do some planning before jumping in and creating groups so you can maximize the effectiveness of this feature for your staff.

## Meeting Details

Click on the  icon in the *Meeting Details* tab.

This opens a window to add a new location. The properties include Location, Type, and Schedule(s).

## Adding Meeting Details

**Group Location**

1 Location

2 Type

3 Schedule(s)

Ok Cancel

Sunday 12:00pm

Road Runners	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		
Wolves	Meeting Location	Saturday 4:30pm, Saturday 6:00pm, Sunday 9:00am, Sunday 10:30am, Sunday 12:00pm		

Group Schedule

None  Weekly

Scheduling

### 1 Location

Choose from the drop down (these are the rooms from the *Named Locations* page).

### 2 Type

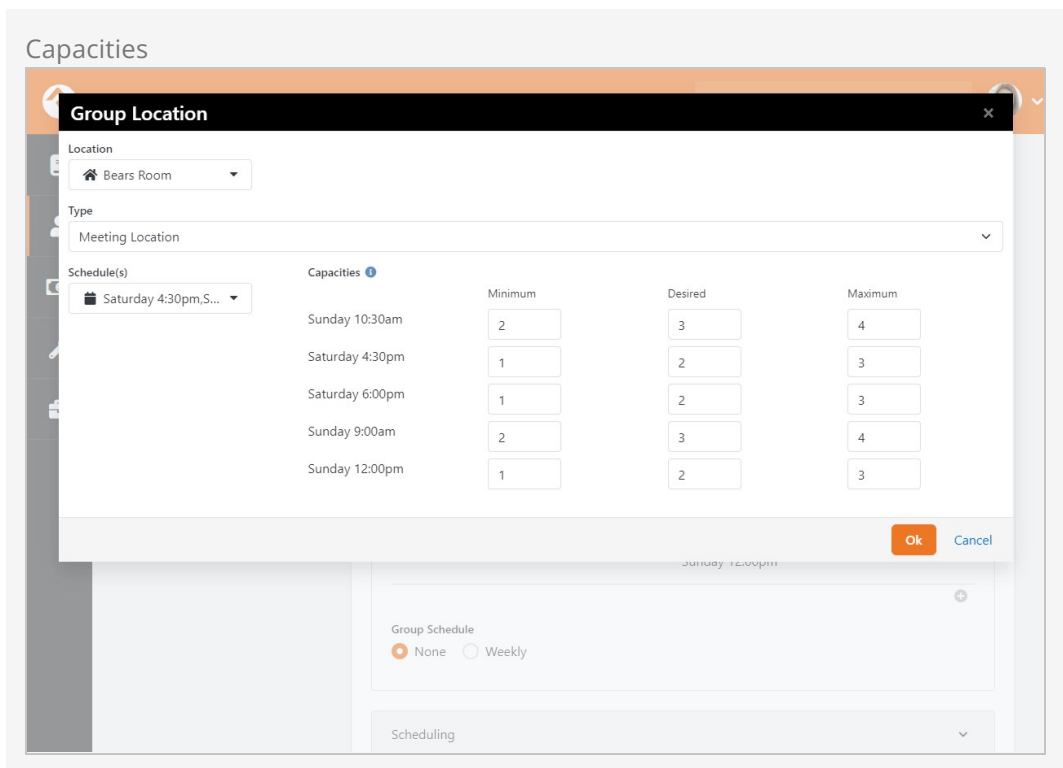
These are Defined Types found in `General Settings > Defined Type > Group | Location Type.`

### 3 Schedules

This drop down shows all the times from the *Schedules* page in General Settings.

You can select multiple schedules (i.e., service times) just by clicking on them one by one. Make sure you use the same schedule for every group in the meeting details. This will avoid scheduling conflicts. More properties can be selected to add the minimum, desired and maximum people needed for that room and its times.





You have the option to choose different capacities for each time. The *Group Location* screen pictured above is where all those details are customized.

When it's complete, you shouldn't have to do anything in the meeting details again until your organization opens more rooms or adds times.

### Members

It goes without saying: it's best practice for your volunteers to be members in the group to appear on the people list in the Group Scheduler, although there are other ways to search for people in the Group Scheduler. We'll discuss that later.

Next, you'll need to set up the group's Scheduling options. Even though scheduling is enabled at the Group Type level, there are settings you can control for each group individually.

### Scheduling

**Group Viewer**  
Home > Children's

**Groups** + 🔍 ⋮

- Global Connector Group
- > Section A
- > Section B
- > Serving Teams
  - Children's
  - Greeters
  - Ushers
- Ushers
- General Groups

**Children's** Serving Team North Campus

Name: Children's Active Public

Description: Are responsible for teaching children.

General

Meeting Details

Scheduling

- Scheduling Must Meet Requirements**
- Check-in Requirements** Schedule Not Required
- Schedule Cancellation Person to Notify**
- Disable Group Scheduling**
- Disable Schedule Toolbox Access**

Group Attribute Values

Member Attributes

Save Cancel

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### 1 Scheduling Must Meet Requirements

If this is enabled, then the person must meet the group's membership requirements in order to be scheduled. For instance, you might want to prevent someone from being scheduled in certain groups if their background check is expired.

### 2 Check-in Requirements

The setting here applies when the person attempts to check in to the group. The options include:

- **Schedule Not Required:** The person does not need to be scheduled in order to check in for this group
- **Pre-select Group if Scheduled:** If the person is scheduled then this group will be pre-selected when the person goes to check in
- **Schedule Required:** A person can't check in to this group unless they are scheduled

### 3 Schedule Cancellation Person to Notify

If a person is scheduled but responds that they can't attend, this person will receive a cancellation communication.

- 4 **Disable Group Scheduling**  
Group scheduling is enabled at the Group Type level, but you can disable group scheduling for individual groups using this setting.
- 5 **Disable Schedule Toolbox Access**  
Enabling this takes the group out of the public-facing Schedule Toolbox.

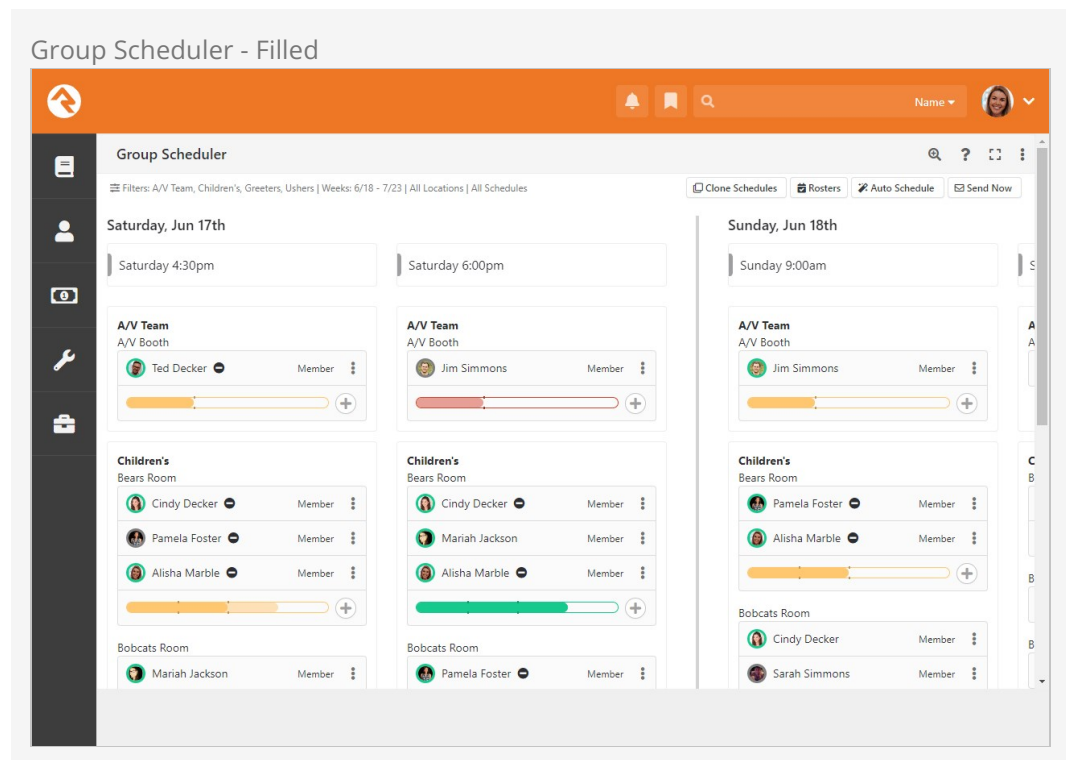
### Setting up Permissions

You'll want to be sure that the right people have the proper permissions to access and manage groups. We have all the info you need on how group security works for both group leaders and staff in the *Securing Groups* chapter above.

## Group Scheduler

Now the moment of truth...the *Group Scheduler* page. This is where the magic happens. Okay, maybe not actual magic, but it is where the scheduling happens. This page will become very familiar to your staff, since it's the "magic page" for organizing group members into a location.

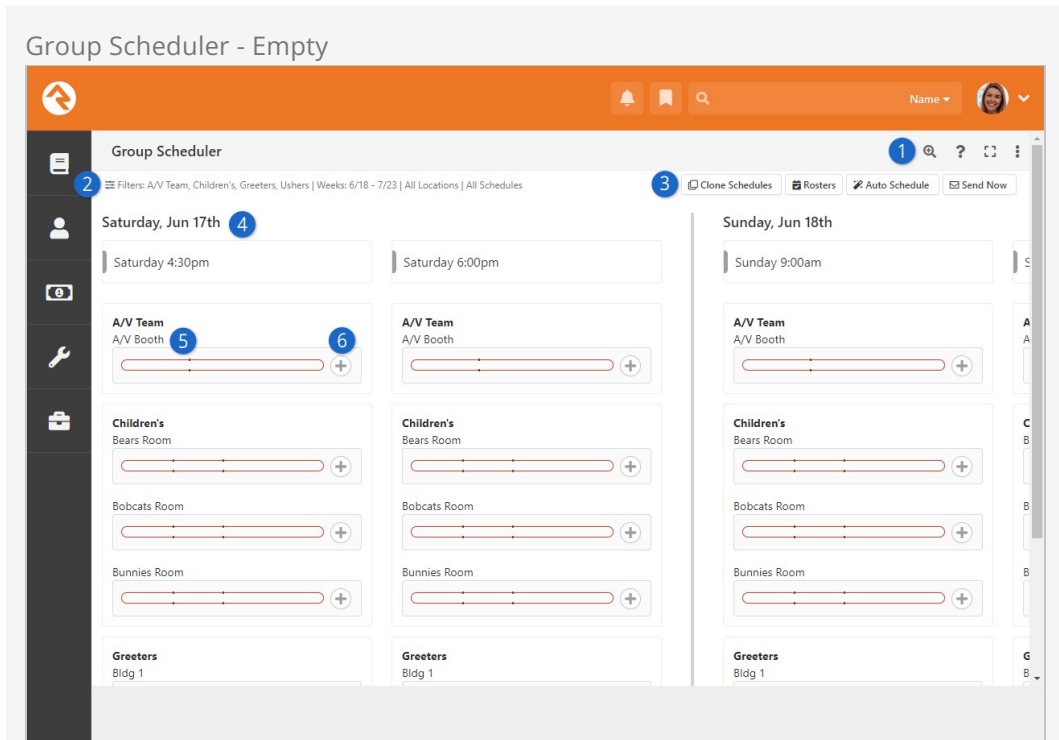
The Group Scheduler can be accessed from `People > Group Scheduling > Group Scheduler`.



### Using Group Scheduler

At first the group scheduler will be empty as pictured below. Let's start from here to

show how we can build a full schedule from a blank canvas. First, we'll tour some of the features and functions on this page.



### 1 Page Options

The icons in the top-right corner of the block allow you to see and do different things.

1. **Zoom:** We made it easy to change the zoom level, so the group scheduler fits well into screens of different sizes.
2. **Help:** Click here to show a handy summary of how various parts of the Group Scheduler works and what different icons mean. This is a great quick-reference tool for staff using the page.
3. **Full Screen:** Click this to turn the full-screen view on or off.
4. **Copy Link to Clipboard:** A link which includes the filters you've selected on the page (i.e., weeks, locations, schedules) can be copied to your clipboard. Anyone with proper permissions who uses it will essentially see the page as it appears for you when the link is copied.

### 2 Filters

Click here to change what you see on the screen. You can choose which groups, weeks, locations and schedules you want to see.

### 3 Scheduler Actions

1. **Clone Schedules:** This copies schedules and assignments from one week to another. We'll cover this a little later below.
2. **Rosters:** This button takes you to the *Group Schedule Roster* page. How convenient!
3. **Auto Schedule:** Click this button to let Rock automatically schedule people based on their serving preferences. We'll talk more about Auto Scheduling below.
4. **Send Now:** This will send a scheduling confirmation request to the people who have been scheduled, allowing them the opportunity to

accept or decline their assignments.


**4 Date/Time Columns**

Each column represents a schedule. If there are multiple schedules in the same day, they are grouped together under that date.

**5 Locations**

Listed vertically beneath each schedule are the locations for that schedule. For each location you can see a progress bar indicating how many people have been scheduled at that location for that time. The bar changes color based on the number of people who are scheduled compared to how many people are needed.

**6 Add to Schedule**

Click the  icon to start adding people to the schedule for that date, time and location. We'll show you what that looks like below.

You may have noticed that each group location has a progress bar showing the status of the schedule and how close the location is to being filled. The status is indicated by the color of the bar:

1. **Red:** There are not enough accepted invites to reach the minimum number of individuals needed.
2. **Yellow:** There are enough accepted invites to reach the minimum number, but not the desired number.
3. **Green:** There are enough accepted invites to reach or exceed the desired number.
4. **Orange:** There are too many accepted invites and the maximum number is exceeded.

This is based on how the location is configured, which we mentioned above in the [Configuring Groups](#) section. You can hover over the progress bar to see the configured capacities and the counts for each type of invite response.

At this point we're ready to start scheduling some volunteers. There are two ways to add people to the schedule.

At this point we're ready to start scheduling some volunteers. There are two ways to add people to the schedule.

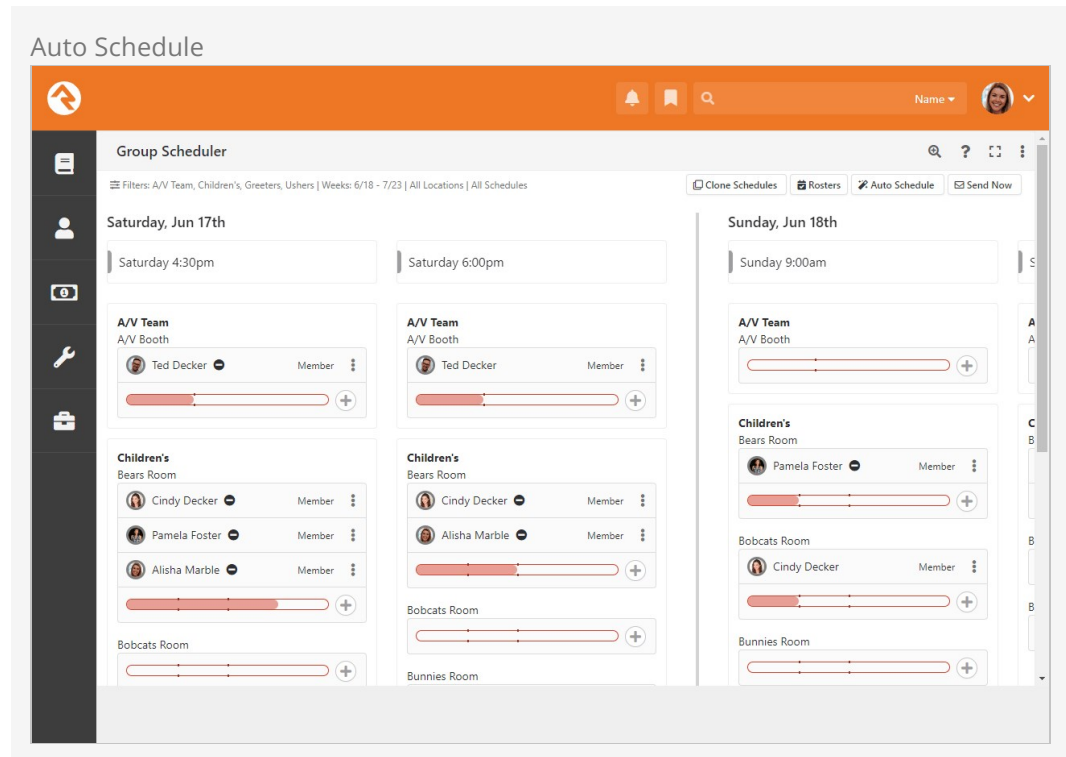
#### Auto Schedule Vs. Manual Schedule

*Auto scheduling* works based on the *serving preferences* set by the volunteers. These preferences can be accessed from the internal site's *Person Profile* page or from the *My Account* page on the external site. With auto scheduling, Rock looks at available volunteer slots and assigns people to those slots based on their preferences. As long as you're using the same schedules to represent the same time frames, then the auto scheduler won't double book anyone. This is why it's best to have one shared schedule for a given time, rather than multiple schedules for the same time.

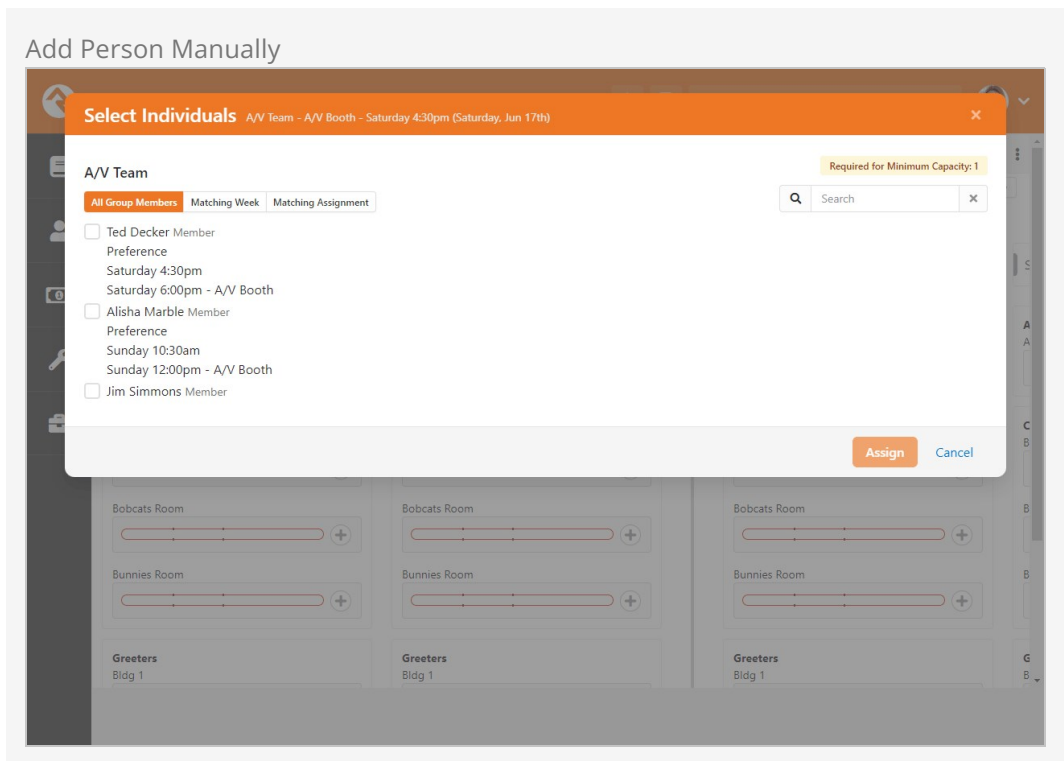
*Manual scheduling* is in the name. It's physically placing people into their serving locations. If we are being realistic here, we know there are going to be those few people who never get around to setting their preferences, so in those cases you'll have to

manually place them.

We'll start with auto-scheduling, since that should fill in a good portion of our schedule for us. This also means people with preferences set get priority. After clicking the `Auto Schedule` button, people will be added to the schedule automatically as shown below.

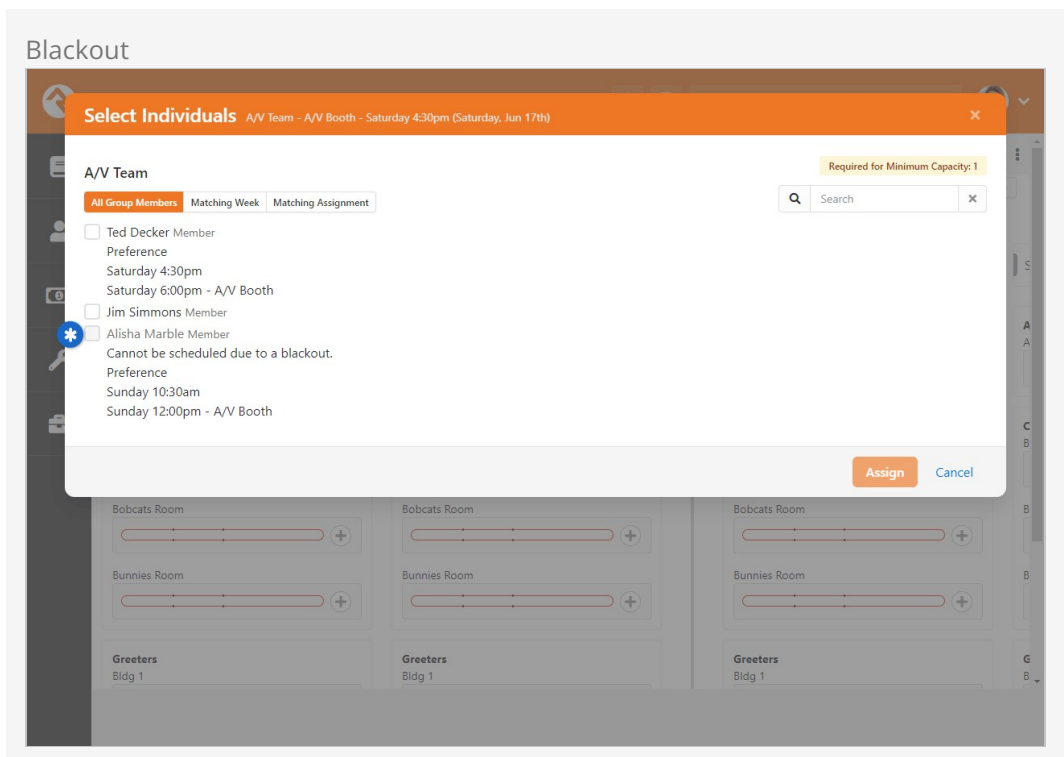


So, we've got several slots already filled in, but there are still some openings. We can use manual scheduling to fill those gaps. Click the `+` icon for a location/schedule to manually add people to the schedule. As pictured below, all you need to do is check the box next to the person's name and click `Assign`. You can find people using the *Search* box near the top-right corner, which is very helpful if you have long lists to look through.

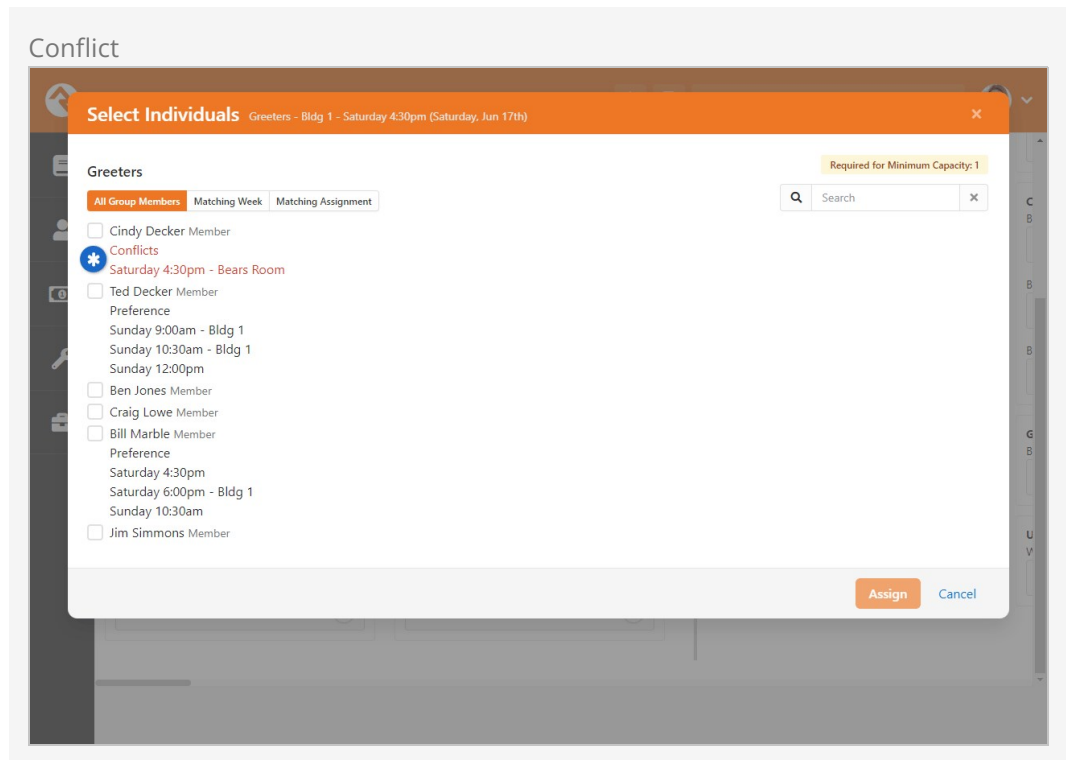


You might have noticed the three different tabs above the list of people. You can choose to view everyone in the group, only those whose week it is to serve (based on their preferences) or only those who have schedule preferences aligned with the schedule/location you're working with.

Keep in mind that people who have a blackout date can't be auto or manually scheduled.



Similarly, you can see if someone has a conflict with another schedule.



If you have multiple sites that are close enough to each other that some people volunteer at more than one location, you will run into a scheduling conflict that doesn't appear as one if the locations have different schedules. For example, one site might have a 4:30pm and 6:00pm schedule while the other only has a 5:00pm schedule. If someone is scheduled for the 4:30pm slot at one site, Rock won't see a conflict if you try to schedule them for 5:00pm at a different site.

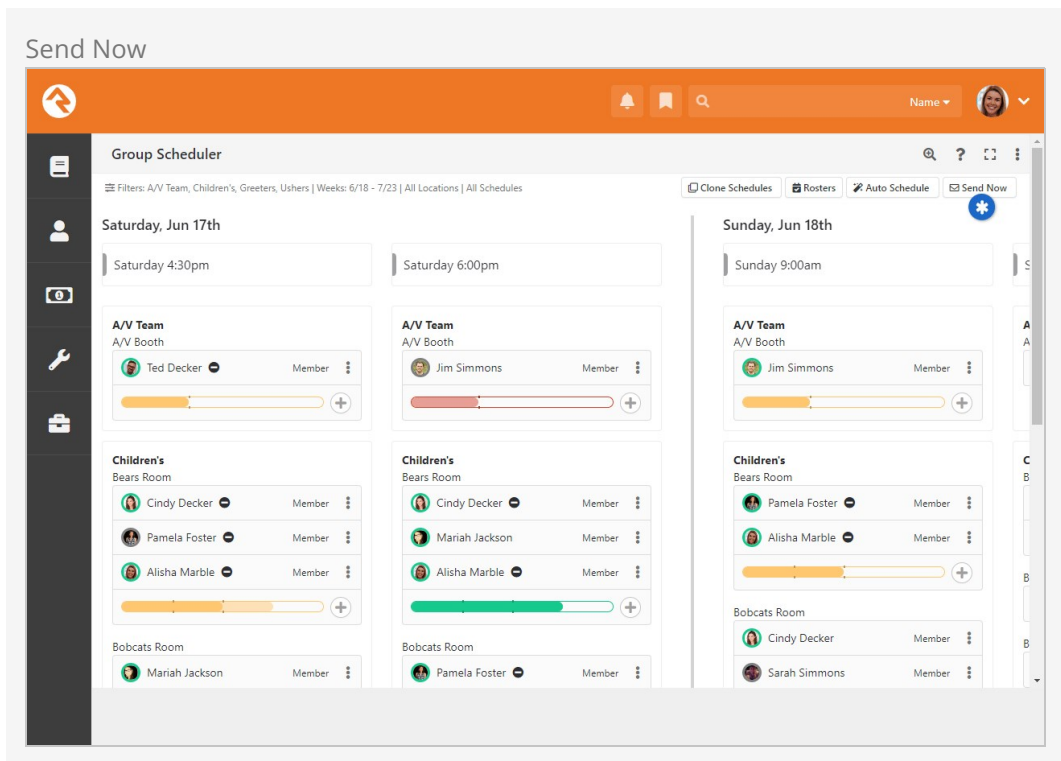
### Note

If both sites have a 4:30pm and 6:00pm schedule, make sure those schedules in your meeting details are the same for all groups. There is no need to have location-specific 4:30pm schedules in the schedule tree.

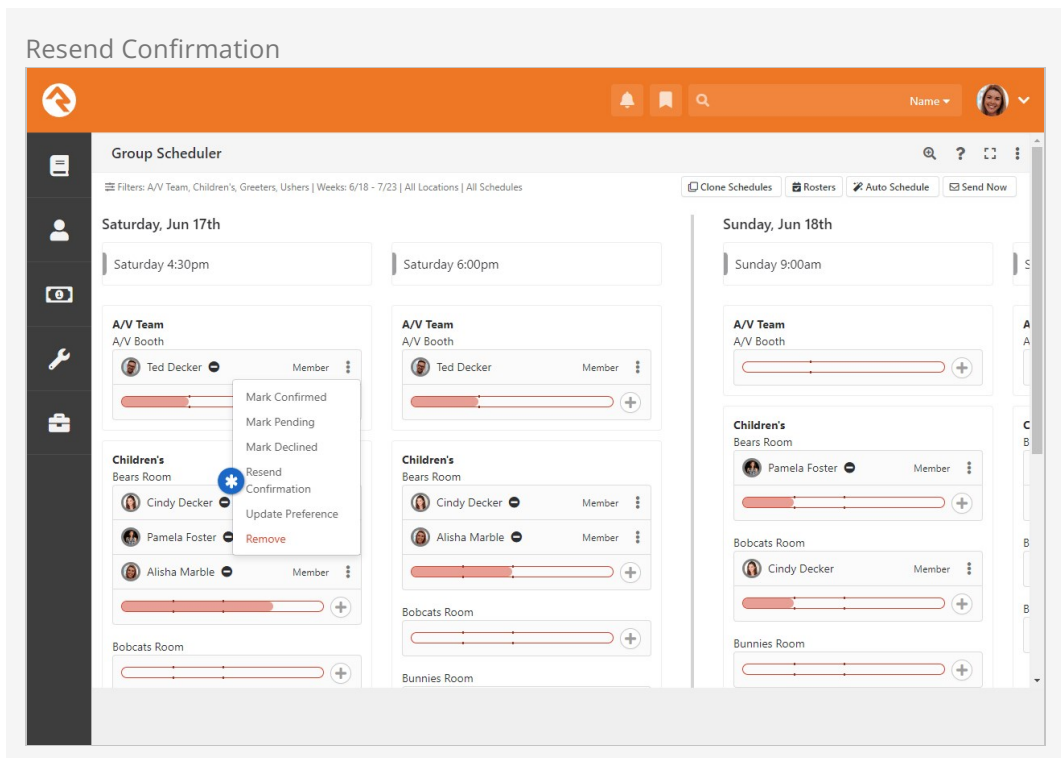
### Confirmation Communication

You will typically send a mass communication once you have your teams set up for them to accept or decline. Click on the `Send Now` button near the top of the block to send a confirmation. Rock will automatically send either SMS or email confirmations based on the person's preferences and available information.





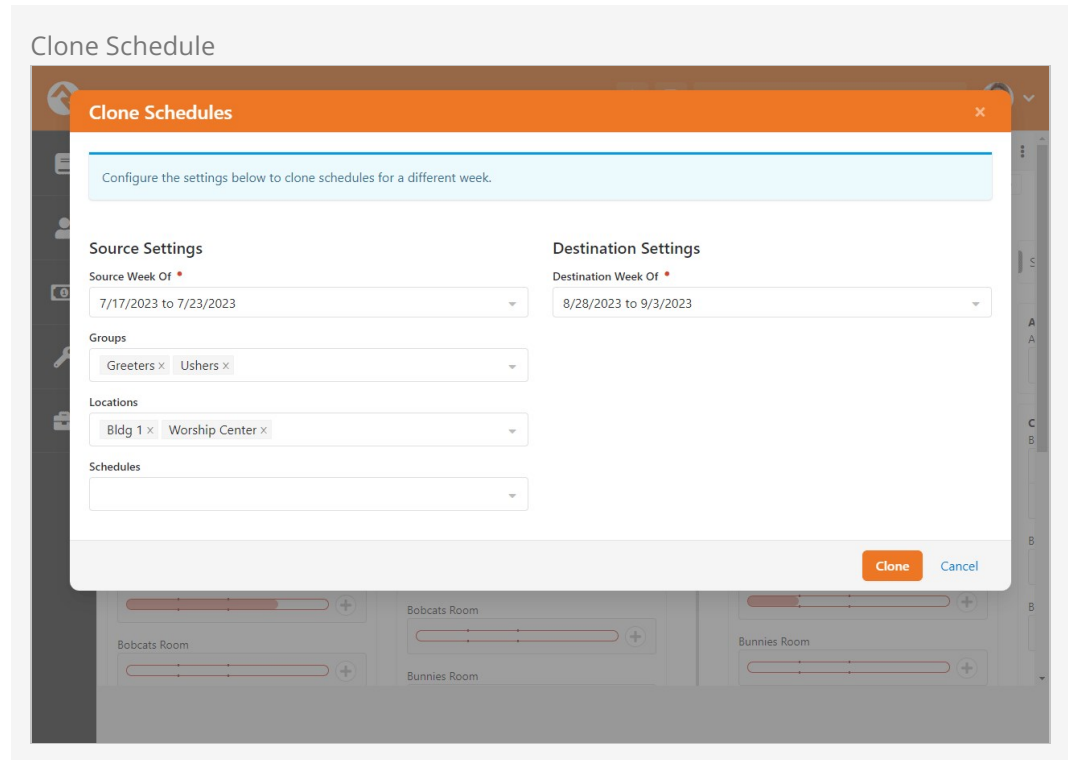
Alternatively, you can send an individual a communication to accept or decline by clicking on the three dots near their name. This opens a drop-down list of options where you can choose the `Resend Confirmation` button to send the email or SMS message to confirm or decline again.



Note the other options you have for managing scheduled people. As pictured above, you can do things like mark them as Confirmed, or update their schedule preferences.

## Clone Schedules

Clicking the `Clone Schedules` button near the top-right of the scheduler allows you to copy schedules and existing assignments from one week to another. As pictured below, you can choose to do this only for certain groups, locations or schedules.



## Schedule Status Board

The status board gives you a bird's-eye view of rooms and times, showing what's covered and what is still needed. You can access the status board by navigating to `People > Group Scheduling > Group Schedule Status Board`.

The block settings allow you to choose a parent group to filter out any unnecessary groups showing in the select groups list. The `Dates` button opens a slider bar to choose how many weeks to show at a time. You can also access the *Group Schedule Roster* and *Group Schedule Communications* pages directly by clicking their links near the top of the page.

# Status Board

Search

Home > Group Scheduling > Group Schedule Status Board

## Group Schedule Status Board

Home > Group Scheduling > Group Schedule Status Board

Schedule Status Board

 Rosters
  Send Communications
  Groups
  Dates

	Mar 26, 2022 Saturday 4:30pm	Mar 26, 2022 Saturday 6:00pm	Mar 27, 2022 Sunday 9:00am	Mar 27, 2022 Sunday 10:30am
<b>Children's</b>				
<b>Bears Room</b>	<span style="color: green;">●</span> Cindy Decker Member <span style="color: green;">●</span> Mariah Jackson Member	<span style="color: green;">●</span> Mariah Jackson Member <span style="color: green;">●</span> Ted Decker Member	<span style="color: green;">●</span> Ted Decker Member <span style="color: green;">●</span> Sarah Simmons Member	<span style="color: green;">●</span> Jenny Michaels Member <span style="color: green;">●</span> Sarah Simmons Member
	1 person needed	1 person needed	1 person needed	1 person needed
<b>Bobcats Room</b>	<span style="color: orange;">●</span> Jenny Michaels Member <span style="color: red;">●</span> Alisha Marble Member	<span style="color: green;">●</span> Cindy Decker Member <span style="color: orange;">●</span> Jenny Michaels Member	<span style="color: green;">●</span> Mariah Jackson Member <span style="color: red;">●</span> Jenny Michaels Member	<span style="color: green;">●</span> Jenny Michaels Member <span style="color: green;">●</span> Sarah Simmons Member
	2 people needed	1 person needed	2 people needed	
<b>Bunnies Room</b>	3 people needed	3 people needed	3 people needed	3 people needed
<b>Greeters</b>				
<b>Bldg 1</b>	<span style="color: green;">●</span> Ted Decker Member <span style="color: green;">●</span> Ben Jones Member	<span style="color: green;">●</span> Tom Miller Member <span style="color: orange;">●</span> Daniel Peak Member	<span style="color: orange;">●</span> Ben Jones Member <span style="color: orange;">●</span> Jim Simmons Member	<span style="color: orange;">●</span> Ben Jones Member <span style="color: orange;">●</span> Jim Simmons Member
	1 person needed	1 person needed	1 person needed	3 people needed
<b>Ushers</b>				
<b>Bldg 1</b>	<span style="color: green;">●</span> Bill Marble Member <span style="color: orange;">●</span> Sarah Simmons Member	<span style="color: green;">●</span> Bill Marble Member <span style="color: orange;">●</span> Sarah Simmons Member	<span style="color: green;">●</span> Bill Marble Member <span style="color: orange;">●</span> Cindy Decker Member	<span style="color: orange;">●</span> Cindy Decker Member <span style="color: orange;">●</span> Sarah Simmons Member
	1 person needed	1 person needed	1 person needed	2 people needed

## Schedule Analytics

The analytics board acts similarly to the scheduler page. You can choose the group, location and schedule then hit Update to show records of the response, or lack thereof, in one place.

Search

Home > Group Scheduling > Group Scheduler Analytics

## Group Scheduler Analytics

Home > Group Scheduling > Group Scheduler Analytics

Group Scheduler Analytics

 ?

**Date Range**

Date Range  to

**View By**

Group
  Dataview
  Person

**Select Group**

● Children's

**Locations**

Bears Room  
 Bobcats Room  
 Bunnies Room

**Schedules**

Saturday 4:30pm  
 Saturday 6:00pm  
 Sunday 9:00am  
 Sunday 10:30am

Update

Name	Scheduled	No Response	Declines	Attended	Decline Reason	Did Not Show
Alisha Marble	5	2	1	-	3/26/2022 4:30 PM	2
Becky Peterson	2	2	-	-		-

## Group Schedule Roster

The *Group Schedule Roster* shows you who's serving, plain and simple. Of course, you can see this information from other group scheduling tools, but the roster provides a clean, simplified view of volunteers and where they're scheduled. This layout is great for printing, to give your staff a paper copy they can use to track volunteers. It even comes pre-populated with checkboxes next to each person's name, so individuals can be marked off the printed list.

To access the roster, navigate to [People > Group Scheduling > Group Schedule Roster](#).

Group Schedule Roster

Home > Group Scheduling > Group Schedule Roster

Group Schedule Roster  Live Update

**Greeters** 📅 Thursday March 24, 2022 ⌚ 6:00 PM 📍 Bldg 1

Name	Name
<input type="checkbox"/> Daniel Peak	<input type="checkbox"/> Jim Simmons

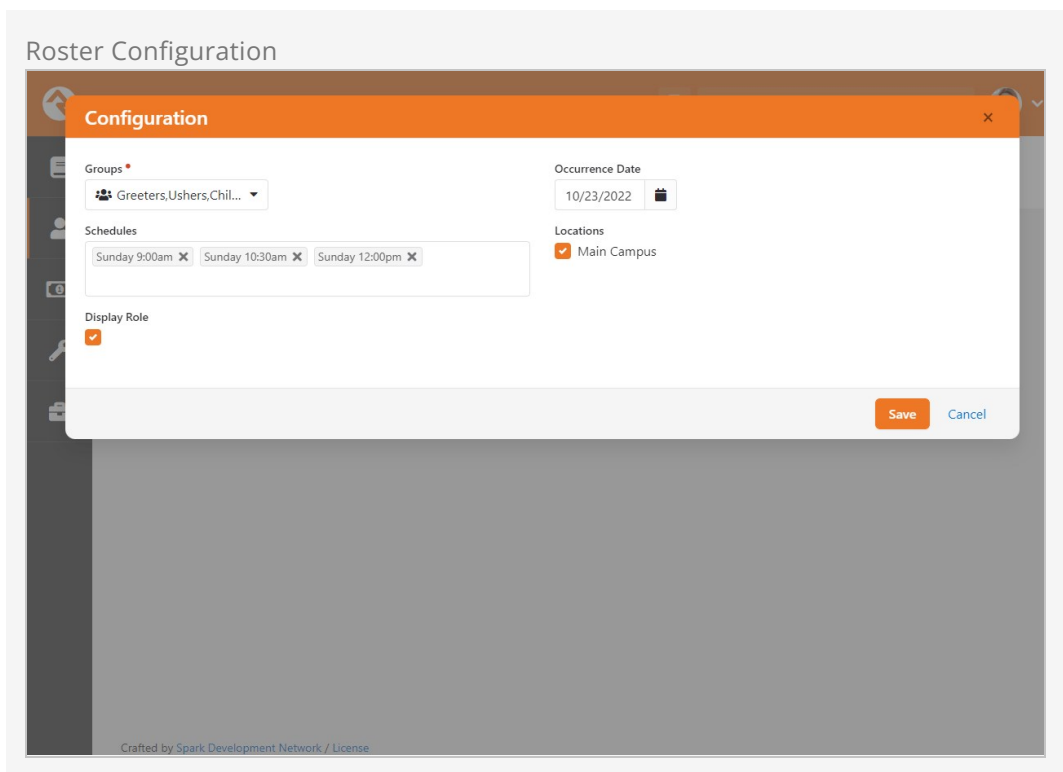
**Ushers** 📅 Thursday March 24, 2022 ⌚ 6:00 PM 📍 Bldg 1

Name	Name
<input type="checkbox"/> Bill Marble	<input type="checkbox"/> Cindy Decker

**Children's** 📅 Thursday March 24, 2022 ⌚ 6:00 PM 📍 Kittens Room

Name	Name
------	------

You can click the icon to access the configuration for the roster. These settings let you add or remove the groups, locations and schedules shown on the roster. This way you can rapidly print several different rosters for the day. This is also where you change the date of the roster, to view assignments on different dates.



By default, the roster is updated automatically every 10 seconds, to pick up scheduling changes as they occur. After all, you don't want to print outdated rosters, and last-minute changes are always a risk. This "Live Update" feature can be disabled, or set to a different refresh frequency, by accessing the block's settings. Just keep in mind that a very frequent refresh rate may negatively impact performance.

## Group Scheduling Communications

There are different ways to send group scheduling communications from Rock. You can send scheduling confirmation requests from the *Group Scheduler* page as described above, or you can wait for a job to run to send them for you. You can also send custom one-time communications if you need to.

### Send Group Schedule Notifications Job

Rock will automatically send out confirmation and schedule communications based on the values you set on the Group Type Detail page. By default, these communications will be sent daily at 4pm to people who have not already received them. If you want to change the sending time, you can edit that time in the "Send Group Schedule Notifications" job, which can be viewed under [Admin Tools > System Settings > Jobs Administration](#).

We have "Scheduling Confirmation Email" and "Group Attendance Reminder" system communications already set up for you, which are of course customizable to fit your organization's lingo. Just like all system communications, you can view and modify them under [Admin Tools > Communications > System Communications](#).

See our [Communicating With Rock](#) guide for more information on working with system communications.

## Custom Group Scheduling Communications

While schedule and confirmation communications are certainly useful, sometimes you'll want to send other types of communications to your teams. On top of that, maybe you just want to contact volunteers who have Accepted the invite, or only those that are serving on Sunday. The *Group Schedule Communication* block lets you do all that, and more, quickly and easily. You can navigate to it directly from [People > Group Scheduling > Group Schedule Communication](#) or you can access it from the *Group Schedule Status Board*.

Group Schedule Communication

Home > Group Scheduling > Group Schedule Communication

Group Schedule Communication

1 Groups \*  
Greeters, Ushers, Chi...

2 Include Child Groups

3 Invite Status \*  
 Accepted  Pending  Declined

4 Locations \*  
 Bears Room  Bobcats Room  
 Main Campus

5 Schedules \*  
Saturday 4:30pm Sunday 9:00am Sunday 10:30am

6 Week  
Week of 9/20/2021 to 9/26/2021

7 Create Communication

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### 1 Groups

Members of the group or groups selected here will form the initial list of individuals that will receive the communication. If you don't want to send the communication to everyone in this list, you can use the other settings on this page to narrow it down.

### 2 Include Child Groups

If you have a lot of groups, you don't always have to select each one individually. Enabling this option will include members of any child groups a selected parent group has. You can select multiple parent groups if needed.

### 3 Invite Status

You can choose to send the communication only to individuals with a certain Invite Status. If you want everyone to receive the communication, select all statuses.

### 4 Locations

You can limit the communication to people serving in certain locations. The list of locations you see here is automatically filtered according to the group selections, so it may change as you add or remove groups from the communication.

**5 Schedules**

Like the *Locations* field, you can select certain schedules to further refine the list of communication recipients. For instance, you may only want to communicate with volunteers for the Sunday morning services.

**6 Week**

The list of volunteers will probably change from week to week. Select a week here to send the communication to those scheduled during that week.

**7 Create Communication**

After you've made your selections above, clicking this button will take you straight to the `Communication Wizard` with the list of recipients conveniently pre-loaded for you. At that point you would proceed with creating a new communication as normal.

# Group Blocks

By now you've seen the power of groups in Rock. Hopefully, you're starting to see all the different ways they can bend and flex to meet the demands of your organization. The real power is when you break free to see *what is* and start to comprehend what *could be*. While we've attempted to *pre-configure* groups with some standard best practices, you shouldn't limit yourself to what is configured out of the box.

The best way to see what's possible is to understand what group blocks are available in Rock. Start thinking of these blocks as your own box of Legos®. How you arrange and build with these blocks is limited only by your imagination. If you're unfamiliar with blocks and how to add them to a page, take a minute and read about them in the [Designing and Building Websites Using Rock](#) guide.

## Group List

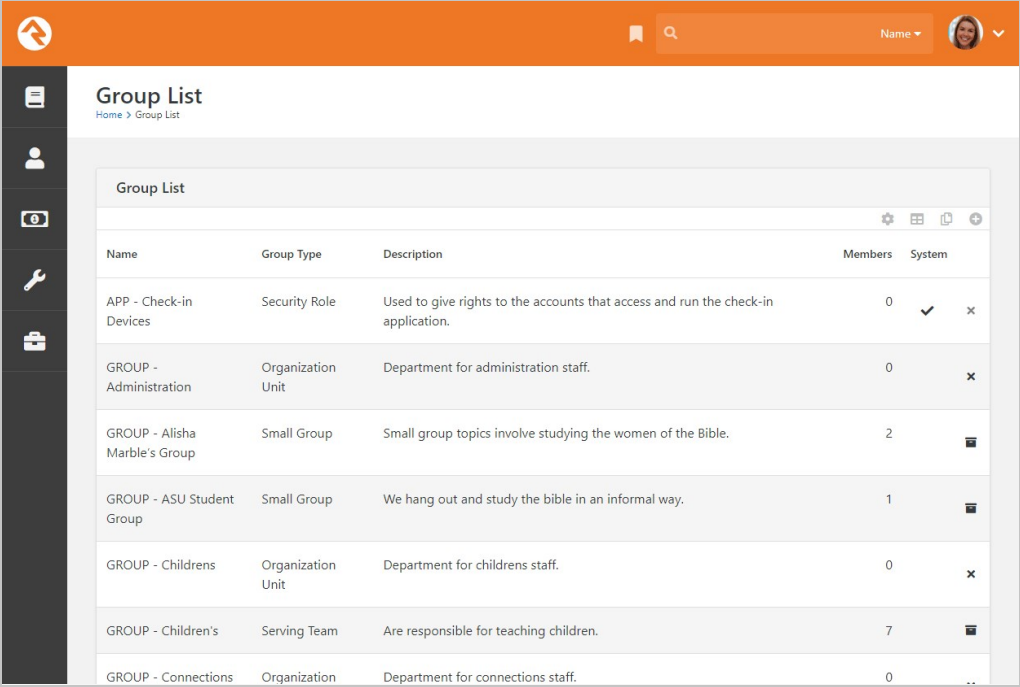
As its name suggests, the *Group List* block lists all groups that match a specific filter. The power of this block lies within its block settings. They allow you to:

- **Include Groups Of Type:** Specify which group types to include in the list.
- **Exclude Groups Of Type:** Specify which group types not to show in the list.
- **Detail Page:** The page you would like to navigate to when someone selects a group from the list.
- **Limit to Security Groups:** Remember that security groups are a bit special. While there is a group type for security groups, any specific group can be configured to act as a security group. This setting shows groups that meet any of these criteria.
- **Display Filter:** Determines if the filter panel should be displayed above the list.
- **Display XYZ Column:** This block also has several block settings to hide or display columns for displaying group type, group description, active status, group member count and system status.

Below is an image of a sample group list.



## Group List Block



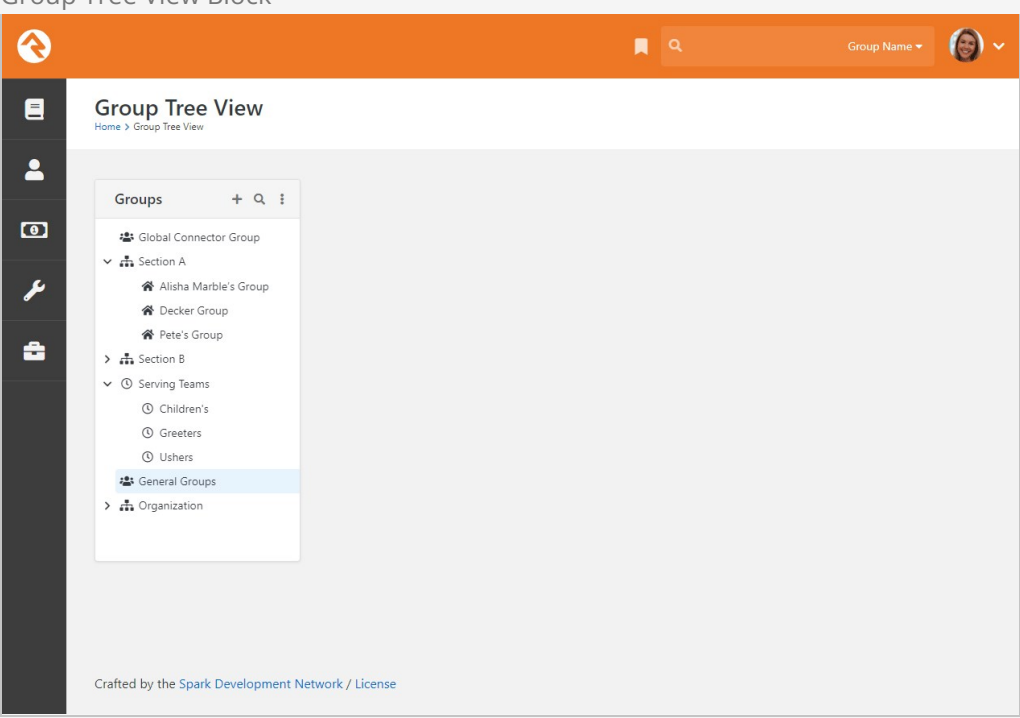
The Group List Block interface features a top navigation bar with a home icon, a search bar, and a user profile dropdown. A left sidebar contains navigation icons for home, user, search, settings, and a briefcase. The main content area is titled "Group List" and contains a table with the following data:

Name	Group Type	Description	Members	System
APP - Check-in Devices	Security Role	Used to give rights to the accounts that access and run the check-in application.	0	✓ x
GROUP - Administration	Organization Unit	Department for administration staff.	0	x
GROUP - Alisha Marble's Group	Small Group	Small group topics involve studying the women of the Bible.	2	☰
GROUP - ASU Student Group	Small Group	We hang out and study the bible in an informal way.	1	☰
GROUP - Childrens	Organization Unit	Department for childrens staff.	0	x
GROUP - Children's	Serving Team	Are responsible for teaching children.	7	☰
GROUP - Connections	Organization	Department for connections staff.	0	..

## Group Tree View

The *Group Tree View* block is very similar in configuration to the *Group List* block except that it displays the groups in a hierarchical tree view. Below is a sample of what this block would look like.

## Group Tree View Block



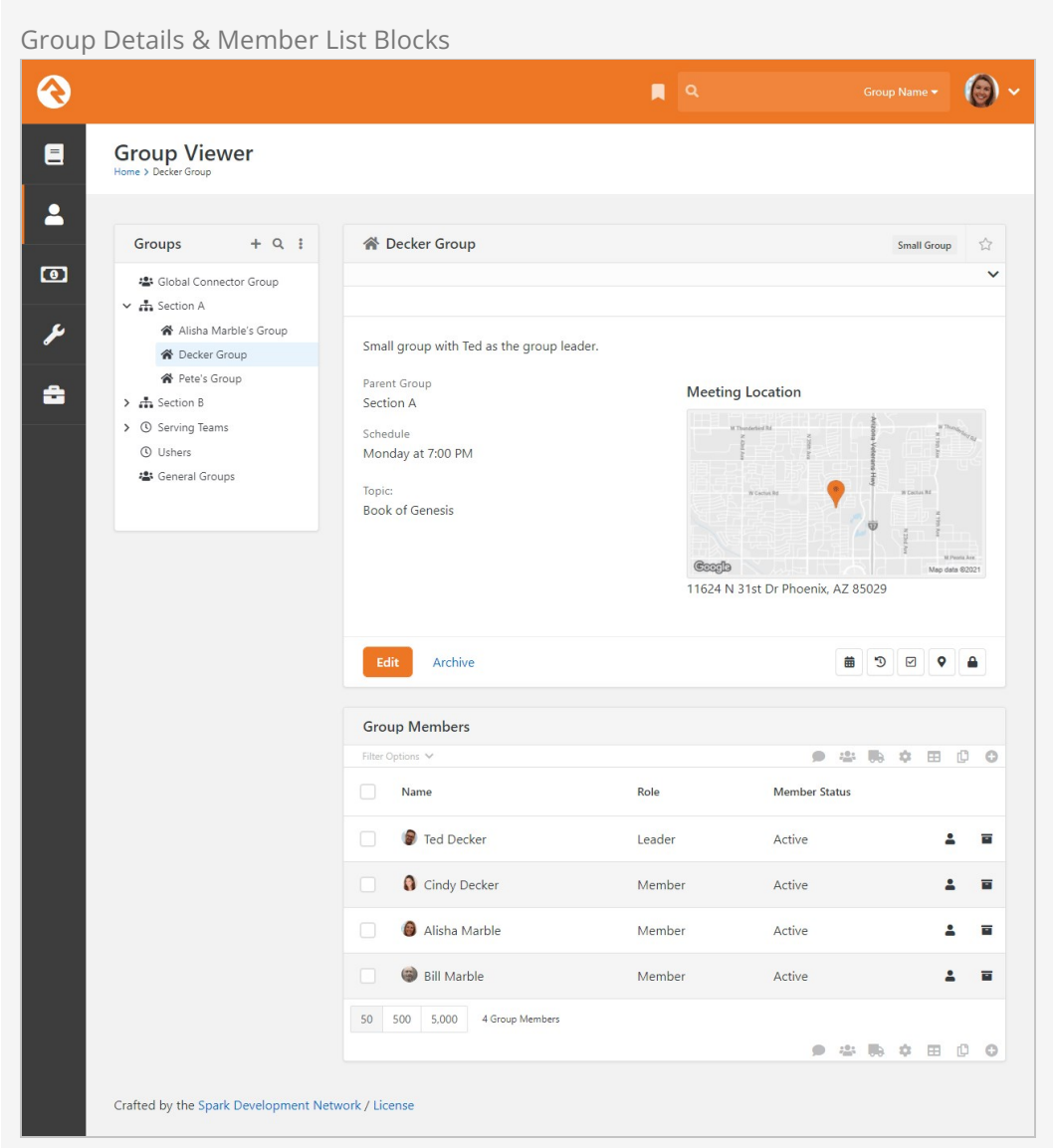
The Group Tree View Block interface features a top navigation bar with a home icon, a search bar, and a "Group Name" dropdown. A left sidebar contains navigation icons for home, user, search, settings, and a briefcase. The main content area is titled "Group Tree View" and displays a hierarchical tree structure:

- Groups
- Global Connector Group
- Section A
  - Alisha Marble's Group
  - Decker Group
  - Pete's Group
- Section B
- Serving Teams
  - Children's
  - Greeters
  - Ushers
- General Groups
- Organization

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## Group Details / Group Member List / Group Member Details

While these are three different blocks, they are usually used together to fully display the contents of a group with the ability to edit.



The screenshot displays the 'Group Viewer' interface for 'Decker Group'. The interface includes a sidebar with navigation options, a main content area with group details, and a 'Group Members' table.

**Group Viewer**  
Home > Decker Group

**Groups** + Q

- Global Connector Group
- Section A
  - Alisha Marble's Group
  - Decker Group**
  - Pete's Group
- Section B
- Serving Teams
- Ushers
- General Groups

**Decker Group** Small Group

Small group with Ted as the group leader.

Parent Group  
Section A

Schedule  
Monday at 7:00 PM

Topic:  
Book of Genesis

**Meeting Location**

11624 N 31st Dr Phoenix, AZ 85029

**Group Members**

Filter Options

<input type="checkbox"/>	Name	Role	Member Status	
<input type="checkbox"/>	Ted Decker	Leader	Active	
<input type="checkbox"/>	Cindy Decker	Member	Active	
<input type="checkbox"/>	Alisha Marble	Member	Active	
<input type="checkbox"/>	Bill Marble	Member	Active	

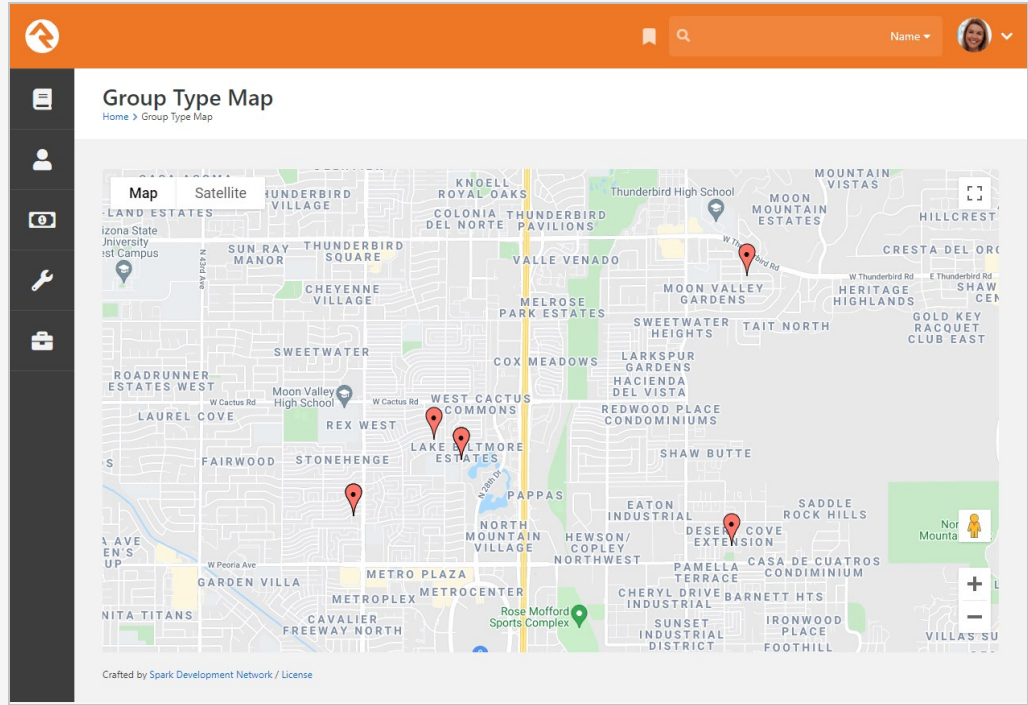
50 500 5,000 4 Group Members

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## Group Type Map

The *Group Type Map* block maps the location of every group of a specified type. This is different from the *Group Map*, which shows members of a single group. While not included on a page out of the box, the *Group Type Map* is a very powerful block for mapping all of your small groups. Small organizations could even use it to map all the families in the database (remember families are groups too). Below is a sample of this block in action.

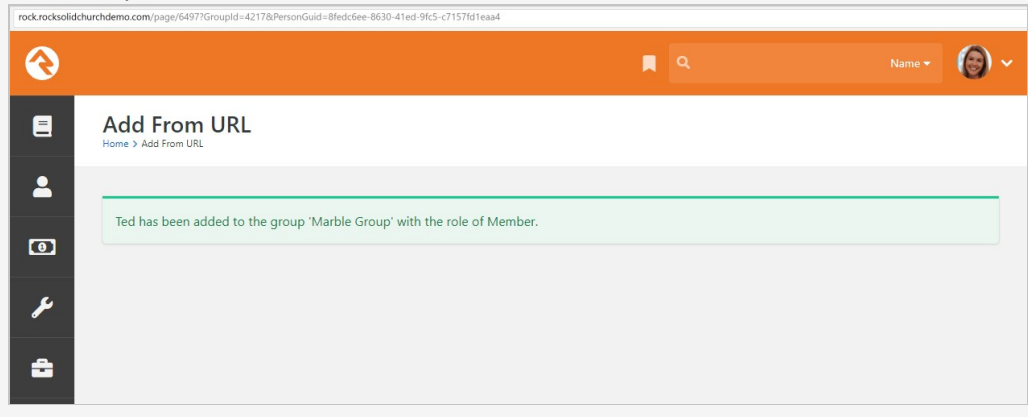
## Group Type Map Block



## Group Member Add From URL

Say what? OK, this is easy... this block when passed a PersonGuid and GroupId through the query string will add the person to the group and display a Lava template of your design. This is very useful in crafting various group registration scenarios. To get the juices flowing think about all the things you could do with this using the *Dynamic Data* and *Group Finder* blocks. There you go!

## Add Group Member From URL

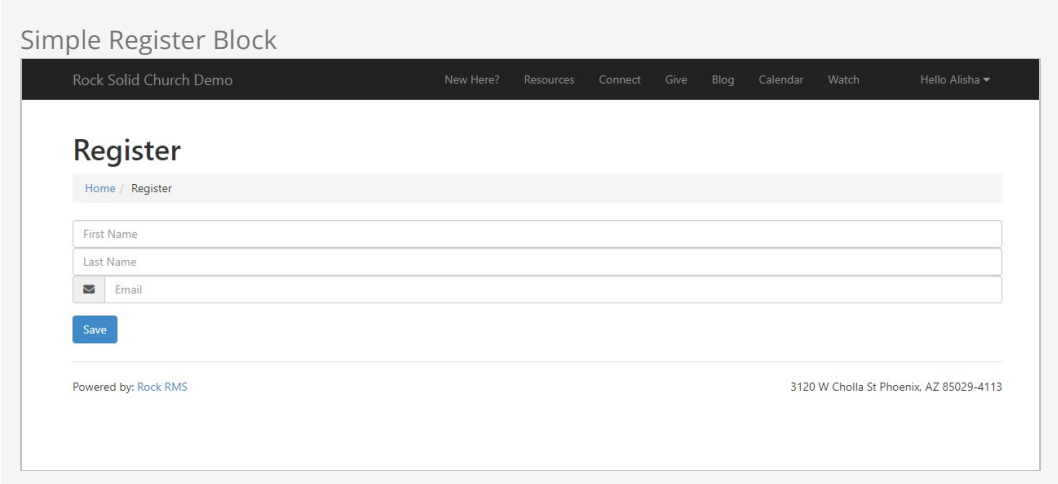


## Group Member Remove From URL

This block is just like the Group Member Add From URL block - but the opposite. It takes a PersonGuid and GroupId through the query string and will remove the person from the group and display a Lava template of your design. This allows you even more flexibility in creating group registration situations. Alright!

## Group Simple Register

This block is another block that's handy for registration scenarios. It provides a simple form that accepts a first name, last name, and email address, registers the person to a group, and then forwards them on to a confirmation page. This block is most useful when it's used on an external facing site as a simple first point of contact but is flexible enough for many other scenarios!



The screenshot shows a web page titled "Simple Register Block" for "Rock Solid Church Demo". The page has a dark navigation bar with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and a user greeting "Hello Alisha". The main content area is titled "Register" and includes a breadcrumb "Home / Register". The registration form consists of three input fields: "First Name", "Last Name", and "Email" (with an envelope icon). A blue "Save" button is positioned below the fields. At the bottom of the page, it says "Powered by: Rock RMS" and "3120 W Cholla St Phoenix, AZ 85029-4113".

## Group Simple Register Confirm

This block is designed to pair with the Group Simple Register block as a confirmation page. When a user is redirected to this page it provides either a success or a failure message. It's that simple!

## Group Registration

This block is the big brother of the Simple Register block. This block takes a GroupId as a query parameter for context and allows you to do a few neat things like fire off a workflow when a user registers and use Lava options to format the registration form. It also has a full mode that takes down address details and phone details and a full with spouse -- which does exactly what you might expect. Use this mighty block when you want to get more than your standard information about a person or when you want to use a specific workflow process for your registrants.

## Group Registration Block

Rock Solid Church

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

---

# Register

Home / Connect / Register

Sign up for Decker Group

**First Name \***

**Last Name \***

**Home Phone**

**Cell Phone**

 Enable SMS
 

**Email \***

**Address Line 1**

**Address Line 2**

**City**  **State**  **Zip**

[Register](#)

---

Powered by: Rock RMS
3120 W Cholla St Phoenix, AZ 85029

## Group Map

The *Group Map* block maps the members of a specific group that is passed through the query string (aka passed in through the address of the page `http://server.com/page?GroupId=12`). While this block isn't too powerful on its own, it can be very helpful when used in conjunction with other blocks like the *Dynamic Data* block. Below is a sample of what this block looks like with a sample group.

You'll notice two sets of color-coded labels near the top of this block. Clicking these will toggle the display of groups and families on the map. Below is a description of how and when these label toggles will appear.

#### Group / Group Member Labels (top left)

- If the selected group has a valid geopoint, or geofence location, that group's name will be displayed as a label in the upper left which can be used to toggle the display of the group. The group will be displayed on the map either as a marker or a polygon depending on whether the selected group had a geopoint or geofence. The color of the marker or polygon is determined by the first color specified in the *Colors* attribute of the selected mapstyle defined value. Note: this option will not appear if the selected group does not have a geopoint or geofence defined.
- A *Groups* label will be displayed if the selected group has any child groups with a valid geopoint or geofence location. The child groups may also be either a marker or a polygon. The color of markers is determined by the second color specified in the *Colors* attribute of the selected mapstyle defined value. The color of polygons is determined by the *Polygon Colors* block setting.
- A *Group Members* label will be displayed if the selected group has any members with a valid geopoint location. Clicking the label will toggle the display on the map of those members. Note, if the selected group is displayed as a polygon, these members may or may not be within the boundaries of the polygon. The color of

the markers is determined by the third color specified in the *Colors* attribute of the selected mapstyle defined value.

#### **Connection Status Labels** (top right)

- If the selected group has a geofence location and is displayed as a polygon on the map, then the block will also display a list of *Connection status* labels to toggle the display of families whose locations fall within the boundaries of that polygon.
- The connection statuses that will be included as toggle options are determined by the Connection Status Defined Values. Only those defined values that have a value specified in the *Color* attribute will be displayed. The color value is also used to determine the color of the markers.
- Only families with at least one active record will be included.
- If family members have different connection statuses, they will be ordered by the connection status defined value order, and the first connection status found will be used for the family. For example, if a family has a member and a visitor, the family will be displayed when the *Member* label is selected.

# Service Jobs Relating to Groups

Service jobs allow you to set up reoccurring tasks that run on a schedule you define. Below are jobs that relate to groups.

## Learn More

This section highlights unique aspects of service jobs relating to groups. For information on setting up jobs in general, see the [Rock Admin Hero Guide](#).

## Send Attendance Reminders for Group Type

This job (formerly *Send Attendance Reminders*) sends reminders to group leaders to enter attendance. All individuals in the group with a role that has the 'Is Leader' setting will receive this reminder. Keep in mind that this job will only send reminders to groups of the configured type if the group type's *Send Attendance Reminder* option is disabled (unchecked).

A couple of key configuration options for this job are:

- **Group Type:** The group type that the reminders are for.
- **System Communication:** The system communication that you would like to use for sending the reminder. Rock ships with a *Group Attendance Reminder* system communication for this purpose.
- **Send Reminders:** By default, a reminder will always be sent the day the group meets. By adding values here, you can configure additional reminders if the attendance has not been entered. For instance, entering *2,4* would send reminders two and four days after the group has met if no attendance has been entered.
- **Send Using:** Choose whether the reminder should be sent via SMS text message, email or either according to the group leader's preference. Group leaders can set their preference in the Group Leader Toolbox.
- **Campuses:** You can select one or more campuses to only send reminders for groups associated with that campus. This does require that the groups are tied to a campus.



- **Parent Group:** If you choose a group here, reminders will only be sent to groups that are children (and grandchildren, etc.) of the selected group.

Note that the attendance reminder options available on the group type apply to the *Send Group Attendance Reminders* job described below.

### SMS Job Errors

If the reminder job is configured for SMS, and if a person's communication preference is SMS but they don't have an active/valid SMS number, then the job will record an error. Similarly, if the job can't find the SMS configuration it needs, then it will also record an error message to the job's status/history message.

## Send Group Attendance Reminders

This job is very similar to the *Send Attendance Reminders for Group Type* job discussed above. This job sends a reminder to group leaders about entering attendance for their group meeting. The key difference between the two jobs is that *Send Attendance Reminders for Group Type* requires a group type, while *Send Group Attendance Reminders* does not. That means you can have one job handling all of your reminders for all of your group types.

Keep in mind that this job will only send reminders for group types where the *Send Attendance Reminder* option is enabled under the *Attendance / Check-in* panel. Each group type can continue to have its own *Attendance Reminder Communication Template*.

This job is configured to run every 15 minutes. It looks for Group Types that have *Send*

*Attendance Reminder* checked and once a group's scheduled Start Time is within the *Attendance Reminder Start Offset Minutes* setting, the attendance reminder is sent. This can only happen once per day.

To get a little technical, when a reminder is sent, the *Attendance Occurrence* record is created, and the current date/time is written to the *AttendanceReminderLastSentDateTime* property. This ensures that we never send the same reminder twice in one day.

## Group Leader Pending Notifications

This job allows you to notify group leaders of newly pending members in their groups. This provides the following customization options:

- **Group Type:** The group type to filter off for limiting the groups that are checked for pending members.
- **Include Previously Notified:** This determines if only newly pending members should be sent to leaders, or if pending members who have already been sent once should also be considered. Note that when you initially set up this job, none of the current pending members will have been marked as sent, so they will all be sent to leaders on the first run.
- **Notification Email:** This is the system communication template that should be used. A sample system communication called *Pending Group Members Notification* is provided out of the box for you to use or edit as you see fit.
- **Group Role Filter/Role:** This is an optional setting that allows you to only include pending members of a specified role. If you don't select a role, all roles will be considered. You must first select a Group Type before specifying a role.
- **Pending Age:** Only pending members who have been added or updated within the number of days set here will be included. For instance, you might set this to seven to select pending members added within the past week. Leave this blank to not consider the last time a record was updated.

The notification will be sent to all group members of the group whose role has been configured as *Is Leader*.

### Keeping Your Options Open

Keep in mind that you can set up multiple instances of this job. This allows you to send one scheduled communication for newly pending members and a separate for older pending members that the group leaders have already been made aware of.

## Send Group Attendance Digest

This job sends a summary of group attendance information to certain group *Leaders*.

See the Group Attendance Digest section above for details on the group structure requirements for this job. When you're configuring this job, pay close attention to the following configuration options:

- **Parent Group:** The job needs to know the highest-level parent group in the group structure to identify which child groups apply to the job. Again, this job expects a very specific group structure to be in place, so be sure to check out the Group Attendance Digest section above to make sure you're set up correctly.
- **System Communication:** This is the system communication template that should be used. A sample system communication called *Group Attendance Digest* is provided out of the box for you to use or edit as you see fit.
- **Date Range:** You can choose to send the attendance digest for either the 'Current Week' or the 'Previous Week'.

In order for the job to work correctly, the groups taking attendance must meet on a regular (i.e., Weekly) schedule.

## Process Group History

This job creates historical snapshots of Groups and Group Members for any group types that have history enabled. Once the job runs, groups that have history enabled will show an 'Archive' option instead of 'Delete'. See the Group History chapter for more details.

This job is set to run once per day in Rock.

## Group Attendance Reporting

This job will create new Person attributes to track a person's *First Attended Date*, *Last Attended Date*, *Times Attended in Last 12 Months* and/or *Times Attended in Last 16 Weeks* for groups specified by a Data View. These attributes can be manually assigned categories and security as needed. This job considers all attendance in the specified groups, regardless of whether the person is currently an active member of the group.

When you're setting up this job, you have the following options:

- **Group Data View:** You'll need to create a data view that returns the group or groups that you want to report on. For instance, you might select all groups of the Small Group type to report on a person's attendance in small groups.
- **Reporting Label:** This gets used as part of the name of the attribute(s) that will be created by the job. In the example screenshot below the Reporting Label was "Small Group" so each attribute name starts with that phrase.
- **Tracked Values:** For the groups returned by your data view, select the attendance data you want to track. In the example screenshot below all four options were selected, so four new attributes were created.

In the example pictured below, new attributes have been added to show Small Group involvement. In this case the attributes were manually assigned to the *Visit Information*

category, to allow them to show on the Person Profile.

The screenshot displays the 'Group Attendance Reporting Attributes' interface for a user named Ted Decker. The interface is organized into several sections:

- Header:** Includes a navigation bar with 'Profile', 'Extended Attributes' (highlighted), 'Steps', 'Groups', 'Documents', 'Contributions', 'Benevolence', and 'More'. A search bar and user profile are also visible.
- Profile Card:** Shows Ted Decker's name, role as 'Member', and location 'Main Campus'. It includes a 'Staff +' button and a small bar chart.
- Membership Section:** Contains fields for 'Suppress Sending Contribution Statements' (No), 'Baptism Date' (9/13/2001), and 'Baptized Here' (No).
- Social Media Section:** Lists 'Facebook' (teddydecks) and 'Twitter' (decksondecks).
- Assessments Section:** A placeholder for assessment data.
- Visit Information Section:** Displays attendance statistics: 'Small Groups - First Attended Date' (2/4/2018), 'Small Groups - Last Attended Date' (8/21/2022), 'Small Groups - Times Attended in Last 12 Months' (17), and 'Small Groups - Times Attended in Last 16 Weeks' (4).
- Family Analytics Section:** Shows 'First Gave' (6/14/2015) and 'Last Gave' (8/9/2022).
- Employment Section:** Lists 'Employer' (Rock Solid Church) and 'Position' (Outreach Pastor).
- Childhood Information Section:** A placeholder for childhood data.
- Safety & Security Section:** Shows 'Background Check Date' (10/4/2010).
- Education Section:** A placeholder for education data.

This job will create a new attribute only if it does not find an existing attribute (e.g., from a prior run of the job) to update. This depends on how the job itself is configured. For instance, changing the *Reporting Label* will result in new attributes being created with the new label.

## Group Leader Absence Notifications

The Group Leader Absence Notifications job is intended to alert group leaders when a member of the group has been absent a configured number of times in a row. This is so the leaders can follow up with absent people or update their status in the group if needed. Rock ships with a System Communication created specifically for this notification, called *Absence Group Member Notification*. When you're configuring this job, pay close attention to the following configuration options:

- **Group Type:** Because the job only runs for one Group Type at a time, you'll need multiple instances of this job if you want to run it for multiple Group Types.
- **Notification Email:** You can use the *Absence Group Member Notification System Communication* that ships with Rock, or you can create your own.
- **Group Role Filter/Role:** This applies to the members of the group. If set, only group members with the provided Group Member Role will be evaluated and reported by this job.
- **Minimum Absences:** This is the minimum number of consecutive meeting occurrences for which a person must be absent in order to be included in the

Notification Email. If left blank, then '3' will be used. Setting this to '0' will cause the job to fail.

# Group Requirements

Group requirements allow you to place criteria on who should be allowed to be in a group. For instance, it's a pretty common feature that to be on a serving team around children you need to have an active background check. Administrating this need manually can be daunting, but with Rock why would you EVER consider doing it by hand?

Setting up group member requirements is a two-step process.

1. Define a Group Requirement.
2. Apply the requirement to each group that needs it.

When a group member is checked to determine if they meet a requirement, the result will be one of the three conditions:

- **Positive:** The group member meets the requirement.
- **Negative:** The group member does not meet the requirement.
- **Warning:** Something in the middle. The specific definition of warning will depend on the configuration. For a background check, warning might mean that they have a passing background check, but it's about to expire.

Group requirements can be set at the Group Viewer level, which applies member requirements to one specific group, or at the Group Type level, which applies the member requirements to all groups of a certain type. Both options are explained in detail below.

## Defining Group Requirements

You manage group requirements under [Admin Tools > General Settings > Group Requirement Types](#).

## Group Requirements List

Name ▾

### Group Requirement Types

Home > General Settings > Group Requirement Types

Name	Can Expire	Type	🔒	✕
Background Check Required	✓	Dataview	🔒	✕
Driver's License Required	✓	Dataview	🔒	✕
Passport Required	✓	Dataview	🔒	✕
Trip Insurance		Manual	🔒	✕

4 Group Requirement Types

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Editing a requirement allows you to provide the following configuration options.

### Editing Group Requirements

**1 Name**

This is the name of the requirement. This will appear on the *Group Member Detail* screen in the internal site, and within the fundraising groups pages externally.

**2 Description**

Be sure to provide a good description of the requirements and any of the



underlying criteria that are used to determine whether a group member meets the requirement. A little documentation now will save you headaches in the future.

### 3 Icon CSS Class

You can optionally associate an icon with the requirement. The icon will appear in places like the group member detail screen, or as a requirement for fundraising groups (e.g., for trips).

### 4 Category

It can be very helpful to categorize your requirement types, especially as your list starts to grow. To add categories for requirement types, navigate to `Admin Tools > System Settings > Category Manager` and create a new category with an entity type of *Group Requirement Type*.

### 5 Summary

The Summary you provide will be shown in places where the requirement is displayed, such as the group member detail screen.

### 6 Check Type

So how do we determine the logic of whether someone meets a requirement? Rock gives you three options:

- **SQL:** In this case you provide a SQL statement. This statement should return a list of Person Ids in the database that meet that requirement.
- **Data View:** You can also select a data view that returns a list of all the people who meet the requirement.
- **Manual:** This requires someone to manually determine if a person meets the requirement.

You'll notice that the SQL and Data View options give you a separate property to determine the warning state. You can leave this blank if your requirement doesn't have a warning state.

### 7 Descriptive Labels

People will either meet the requirement, be in a warning state or not meet the requirement. According to the group member's state, these labels will appear where the requirement is displayed, such as the group member detail screen and as a requirement for fundraising groups.

### 8 Requirement Workflows

You can launch workflows for people who either do not meet the requirement or who are in a warning state. Based on the *Auto Initiate* setting described next, the workflow will be launched either manually or automatically. The entity passed to the workflows will be a *Group Member Requirement* entity. If your workflow has a Person attribute with a key of "Person", the corresponding person will automatically be set in your workflow. Requirement workflows must be automatically persisted.

### 9 Auto Initiate

You can choose to automatically launch a workflow at the point when Rock first determines that the group member does not meet a group requirement or that they're in a warning state. If this is disabled, then the workflow can be manually launched in places where the requirement is displayed.

### 10 Link Text

If the workflow is going to be launched manually based on the *Auto Initiate* setting, this is what the link to launch the workflow will say. If nothing is provided here, then default text (e.g., "Requirement Not Met") will be used.

#### 11 Can Expire

Some requirements, once met, will always be true - say for instance a requirement that you take a specific class before serving. Other requirements may expire. A good example of this is a background check or CPR certification. It's important to keep in mind that the *Calculate Group Requirements* job will not automatically re-check to see if the person still meets the requirements unless Can Expire is enabled.

#### 12 Expire Duration

When a requirement can expire, you can set the number of days in the future to wait before re-checking the requirement. For something like a background check, you don't need to look every day to see if the background check is still valid.

#### 13 Due Date

Each requirement of this type will have a due date, and this is where you indicate how that due date is determined.

1. **Immediate:** The requirement applies as soon as the person is added to the group.
2. **Configured Date:** When adding this requirement type to groups or group types, you'll be able to choose a date on which the requirement is due.
3. **Group Attribute:** You'll use this option if you have a group attribute that contains the date on which the requirement is due. You'll choose the attribute when the requirement type is applied.
4. **Days After Joining:** This option gives everyone the same amount of time after joining to complete the requirement.

#### 14 Save

Don't forget to save!


As noted above, the *Expire Duration* is how many days Rock will wait before checking requirements again. With background checks it typically isn't necessary to re-check every day, or even every week or month. But there are edge cases to consider. For instance, let's say someone passed a background check yesterday and, as a result, shows up as meeting the group requirement. Then today something changes with the requirement (e.g., the Data View is updated) and the person no longer meets the requirement. The *Calculate Group Requirements* job will not re-check this person's requirement until after the *Expire Duration* has passed. In such cases the person will appear as meeting the current requirement, even though they don't.

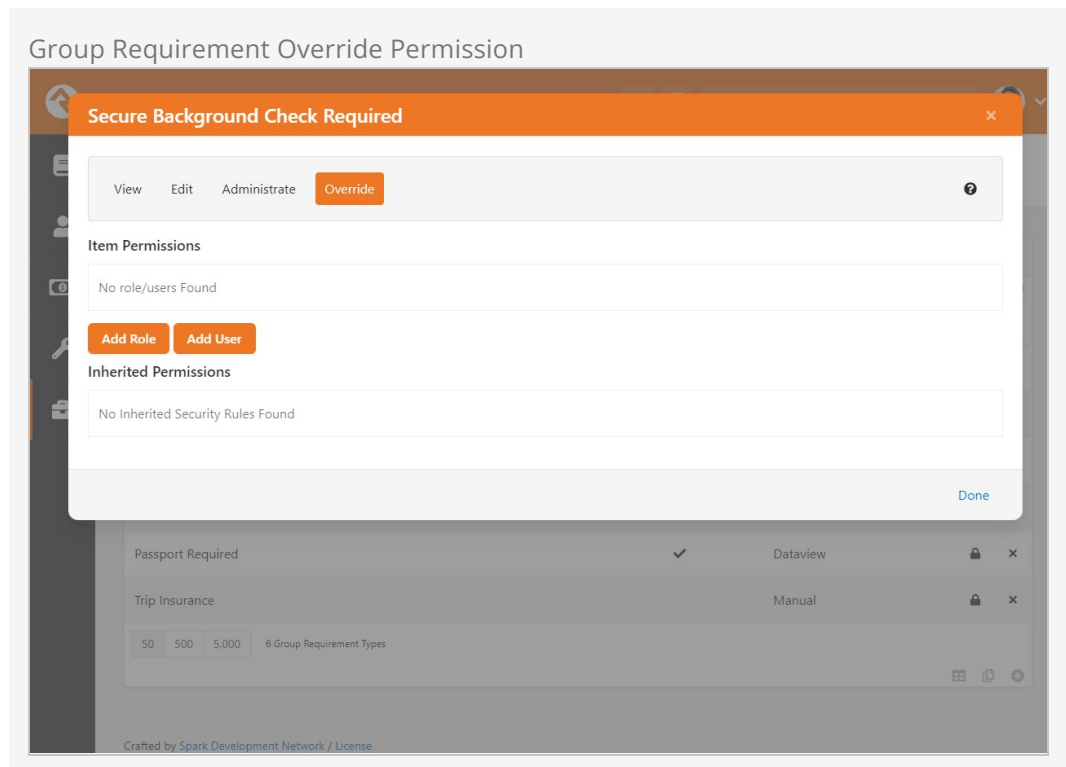
If someone does not meet a requirement and the due date has not been reached, then the person is considered to be in a warning state.

## Tips for Creating Data Views and SQL Expressions

When creating data views and/or SQL expressions for group requirements keep these two things in mind:

- **Meets** The data view/SQL expression for meets should return a list of all the people in the database that meet this requirement.
- **Warning** This data view/SQL expression should return a list of all the individuals in the database in a warning state.

When you apply a requirement type to a group or group type (see the following sections below for instructions on that) you have the option of allowing group leaders to override the requirement for individual group members. For other staff or volunteers, you can indicate who can override requirements by accessing the security for the requirement type by clicking the  icon and adjusting permissions for *Override*.



## Applying Group Requirements to Individual Groups

Once you have defined your requirement, and if *Enable Specific Group Requirements* is enabled at the Group Type level, you can apply the requirement to individual groups. If you have *Administrate* access to a group, you'll notice a panel on the edit screen entitled *Group Requirements*. You can add group requirements from this panel. There is also a setting to keep group members who don't already meet the requirements from being added to a group.

## Limited Restriction

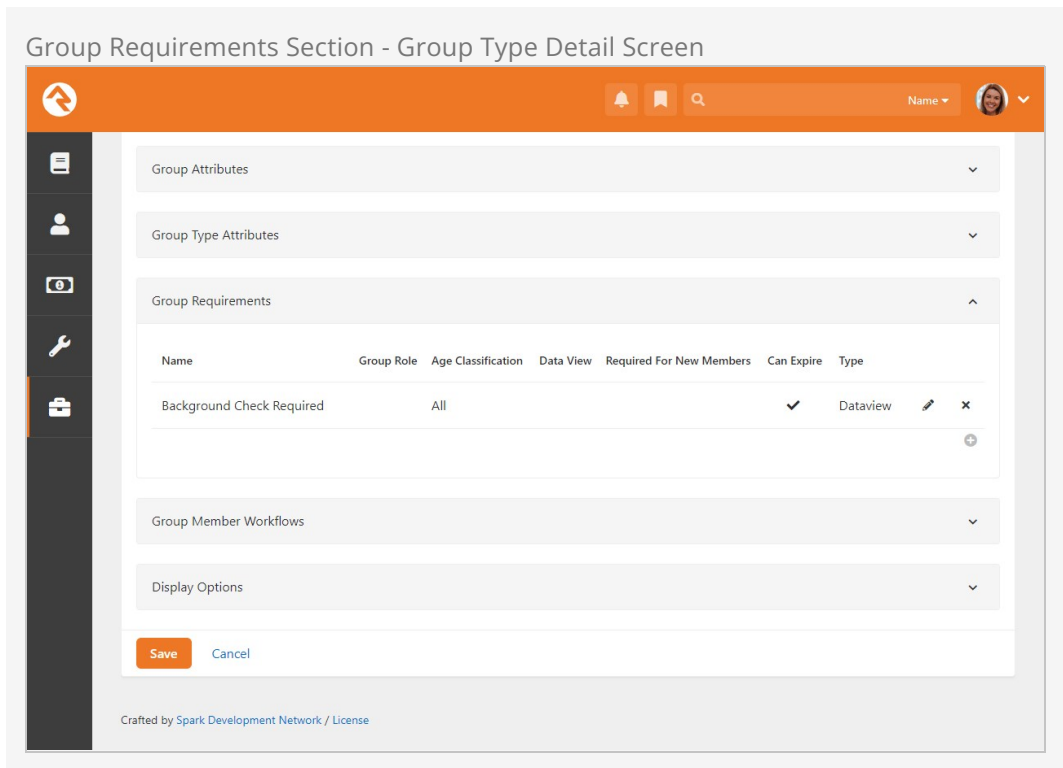
This restriction on adding group members only applies to manually adding people to the group. Workflow actions that add someone to a group will still be able to add people who don't meet the requirement to the group.

Applying Group Requirements

Name	Group Role	Age Classification	Data View	Required For New Members	Can Expire	Type
Background Check Required		All		✓		Dataview

## Applying Group Requirements to Group Types

You can also set group member requirements at the Group Type level. This allows you to apply member requirements to all groups of a certain type rather than to each individual group.



To access your group types, go to `Admin Tools > General Settings > Group Types`. Select the group type you want to add requirements to from the Group Type list. In the Group Type Detail screen, expand the Group Requirements section. From here you can either select an existing group requirement to edit or click the button to add a new requirement.

## Adding New Group Requirement

**Group Requirement**

- 1 Group Requirement Type \*  
Background Check Required
- 2 Applies to Group Role
- 3 Applies to Age Classification  
 All  Adults  Children
- 4 Applies to Data View
- 5  Allow Leaders to Override
- 6  Members must meet this requirement before adding

Save Cancel

Group Member Workflows

Display Options

Save Cancel

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- 1 Group Requirement Type**  
This is simply where you pick the requirement you want to apply. This is where having a descriptive name pays off.
- 2 Applies to Group Role**  
You might have some requirements that only apply to Leaders or that only apply to Members. Whatever roles you have, this is where you indicate which role the requirement applies to. If this is left blank, then the requirement applies to all roles.
- 3 Applies to Age Classification**  
Sometimes requirements like background checks only apply to adults, whereas a waiver for minors would only apply to children. Here you can choose which age classification the requirement applies to or apply it to all age classifications.
- 4 Applies to Data View**  
This is an advanced setting that lets you provide a data view to indicate who the requirement should apply to. This is only needed if the above settings aren't targeting the desired population.
- 5 Allow Leaders to Override**  
For some types of requirements, it makes sense to allow group leaders to provide an override.
- 6 Members must meet this requirement before adding**  
You might set up some serving teams this way, to ensure new members have passed a background check before they get added to the group.

## Viewing Group Requirements

Once you enable group requirements, you'll notice in the Group Viewer that certain group members may have warning icons next to their names. The yellow icon denotes that the group member is in a warning state, while the red icon indicates that the group requirements are not met.

The screenshot displays the 'Viewing Group Requirements' interface. On the left, a sidebar shows a 'Groups' list with 'Children's' selected. The main content area shows the 'Children's' group details, including a description 'Are responsible for teaching children.' and a 'Group Members' table. The table has columns for Name, Role, Member Status, and Hours Serving. Five members are listed: Cindy Decker (Member, Active, 1 hour, yellow warning icon), Brian Gilbert (Member, Active, 1 hour), Bob Greggs (Member, Active, 1 hour, red warning icon), Trish Lowe (Member, Active, 1 hour), and Bill Marble (Member, Active, 1 hour). Below the table, there are pagination controls showing 50, 500, and 5,000 items, with 5 Group Members displayed.

Name	Role	Member Status	Hours Serving
<input type="checkbox"/> Cindy Decker ⚠	Member	Active	1
<input type="checkbox"/> Brian Gilbert	Member	Active	1
<input type="checkbox"/> Bob Greggs ⚠	Member	Active	1
<input type="checkbox"/> Trish Lowe	Member	Active	1
<input type="checkbox"/> Bill Marble	Member	Active	1

While the icons shown above will give you a general sense of whether a person meets requirements or not, you can switch over to the **Requirements** tab to view the status of individual requirements.

## Viewing Group Requirements Tab

Participation Type  
Individual

Edit Delete

Group Members

Group Members Requirements

Filter Options

<input type="checkbox"/>	Name	Role	Requirements
<input type="checkbox"/>	Ted Decker	Leader	Driver's License Required Passport Required Trip Insurance
<input type="checkbox"/>	Cindy Decker	Participant	Driver's License Required Passport Required Trip Insurance
<input type="checkbox"/>	Jenny Michaels	Participant	Driver's License Required Passport Required Trip Insurance

50 500 5,000 3 Group Members

Fundraising Donations

Clicking on a group member will show you details about the group member and the group's requirements. In the group requirements note that you can *Upload Passport* for Ted or mark his Trip Insurance requirement as met.



## Viewing Group Member Details

**Group Member Detail**  
Home > China Mission Trip > Ted Decker

Ted Decker Added: 12/22/2022

**Person** \*  
Ted Decker

**Role** \*  
Leader

**Note**

**Individual Fundraising Goal** !  
\$ 0.00

**Personal Opportunity Introduction** !  
Help me make a difference on the other side of the world!

**Disable Public Contribution Requests** !  
No

**Driver's License Required**  
License on File  
A copy of your driver's license is needed.

**Passport Required**  
Valid Passport Not On File  
We'll need a copy of your passport for this trip. You can provide it here or bring it to the office.  
[Upload Passport](#)

**Trip Insurance Due: 7/1/2023**  
Requirement Met With Warning  
This trip requires trip insurance or a waiver of liability.  
 Trip Insurance or Waiver

**Save** **Refresh Requirements** **Cancel**

**Group Member Notes**

**Ted Decker**  
Group Member Note - 4 days ago  
Can't wait to start this trip!

**Fundraising Donations**

Donor	Donor Address	Donor Email	Date	Amount
<input type="checkbox"/> Alisha Marble	12345 W St Lane Phoenix, AZ 85029	admin@organization.com	1/22/2023	\$150.00

50 500 5,000 1 Donations

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## Group Requirement Jobs

The Group Requirements features rely on two system jobs. These jobs can be configured under `Admin Tools > System Settings > Jobs Administration`.

### Calculate Group Requirements

This job comes pre-configured and running in Rock. Every night it runs to check that all the group members met their requirements.

## Send Group Requirements Notification

This job does not come pre-configured. You can set up this job to send a warning communication to group leaders when a group member does not meet the requirements. These communications will go to group members whose role has been configured with the 'Receives Requirements Notifications' setting. This can be configured under:

[Admin Tools](#) > [General Settings](#) > [Group Types](#) .

Below is a listing of settings for this job.

- **Notification Email Template:** This is the system communication template that you want to use to format the communication. Rock provides a sample communication entitled *Group Requirements Notification* that's configured to meet most needs.
- **Group Types:** The group types you want to check the requirements on.
- **Notify Parent Leaders:** This setting will notify the roles of parent groups of the group. This follows the hierarchy of the group structure all the way to the top. This ensures that top-level group leaders will receive notifications for all the groups under them.
- **Accountability Group:** The group you select here will get a listing of all group members not meeting requirements. Some might call this fascism, but we prefer "inspect what you expect."

# Fundraising Groups

It's unfortunate, but sometimes it takes money to do good in this world. Whether it's money to pay the travel expenses of a mission trip or the small salary of an internship, costs can become a roadblock for many individuals. But when the community can be made aware of these needs, the burden of costs can be shared. The problem then becomes promoting the need and managing the transactions that are generated. Rock's fundraising features make quick work of both problems. Think of it as a mini Kick-starter just for your organization's needs! Let's dive in and see this feature at work.

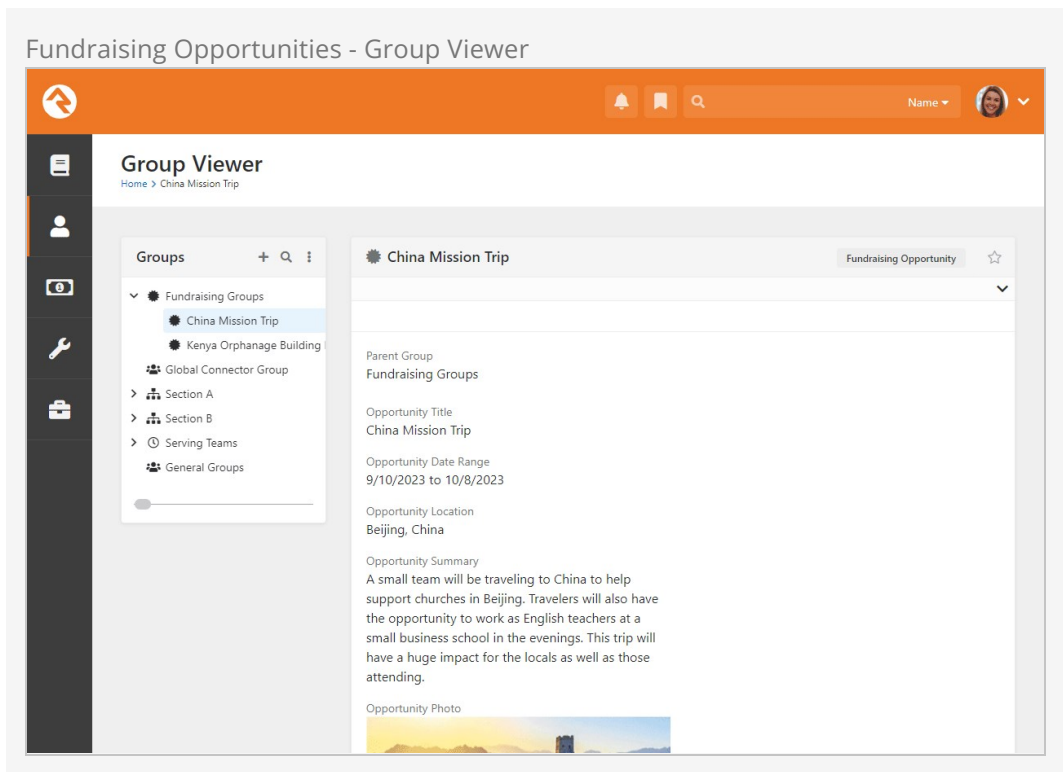
Fundraising needs are stored as a new group inside Rock. These groups are created with the group type *Fundraising Opportunity*. This group type provides several group and group member attributes that will drive the fundraising features within Rock.

Each group will represent a specific type of fundraising activity. Examples include:

- A specific mission trip (e.g., *Summer China Mission Trip*)
- A specific type of fundraising (e.g., *Summer Interns, Fall Sports Season*)

## Fundraising Walk Through

Keep in mind that each fundraising opportunity is a group. You'll manage the opportunities from the Group Viewer.



Ok, but that's the boring part. Let's start looking at how these groups are displayed on your external site! Out of the box Rock configures several pages to view fundraising opportunities. The pages are displayed under the Missions pages (found under the Connect menu item). The missions page lists the various opportunities that are marked *Show Public*. Keep in mind that this block can be filtered by the *Fundraising Opportunity Type* (e.g., Trip, Internship, Project).

# Fundraising Opportunity List

Rock Solid Church Demo

[New Here?](#)

[Resources](#)

[Connect](#)

[Give](#)

[Blog](#)

[Calendar](#)

[Watch](#)

Hello Alisha ▾

## Missions

[Home](#) / [Connect](#) / Missions

- Children
- Students
- Adults
- Prayer
- Missions**
- Serve
- Small Groups
- Contact Us
- Subscribe
- Family Pre-Registration

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Cras non gravida orci, a faucibus felis. Maecenas at sem porttitor, porttitor magna quis, molestie ante. Cras ultricies tempus nunc, in dapibus magna vehicula ut. Nam sodales ante et metus tincidunt ultricies. Phasellus rhoncus nisi quis leo dignissim congue. Nunc id ante vitae lacus sodales facilisis a ac leo. Nam non placerat diam. Ut aliquet nec arcu ut scelerisque. Etiam sit amet nibh tortor. Etiam egestas sit amet mauris quis condimentum. Aliquam libero nulla, pretium non libero ut, consequat porttitor erat. Proin convallis tellus vel nulla laoreet ultrices.

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### Upcoming Fundraising Opportunities



#### China Mission Trip

September 10, 2023 to October 08, 2023  
Beijing, China

A small team will be traveling to China to help support churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This trip will have a huge impact for the locals as well as those attending.

[View Details](#)



#### Kenya Orphanage Building Project

October 15, 2023 to October 29, 2023  
Kalacha, Kenya

Travel to Kenya to help build and establish a new orphanage in a remote village. Once completed the team will welcome the kids into their new home.

[View Details](#)

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029-4113


Selecting one of the opportunities will take you to its detail page. In the example below, Ted (who is leading this particular mission trip) is viewing the page. Since we know it's Ted, a summary of his Fundraising Progress is shown. Links are also displayed to take him to his participant's page and for him to make a payment. Also, note that since Ted is a leader for this opportunity, he has access to a leader toolbox.

Fundraising Opportunity Detail - Leader

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

## China Mission Trip

Home / Connect / Missions / China Mission Trip



September 10, 2023 to October 08, 2023  
Beijing, China

A small team will be traveling to China to help support churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This trip will have a huge impact for the locals as well as those attending.

[f](#) [t](#) [e](#)

[Donate to a Participant](#)  
[Leader Toolbox](#)

**Registration Open**

**Contact**  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

**Registration Notes**  
A non-refundable application fee of \$50 is required to register for this trip.

[Register](#)  
20 spots available

**Ted Decker**    [Participant Page](#)

**Fundraising Progress**    **\$846.00**    [Make Payment](#)

[Trip Details](#)    [Trip Updates \(2\)](#)    [Comments \(0\)](#)

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Pictured below is the same page, but with a fundraising group that's configured to use families. In this case both Ted and Cindy are in the group, and their individual fundraising goals become combined into a single family goal. Note there is a single [Make Payment](#) button for the family, but each member has their own Participant Page.

Fundraising Opportunity Detail - Family

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

## Kenya Orphanage Building Project

Home / Connect / Missions / Kenya Orphanage Building Project



October 15, 2023 to October 29, 2023  
Kalacha, Kenya

Travel to Kenya to help build and establish a new orphanage in a remote village. Once completed the team will welcome the kids into their new home.

[f](#) [t](#) [e](#)

**Decker Family**    [Make Payment](#)

**Fundraising Progress**    **\$2,580.00**

[Donate to a Participant](#)  
[Leader Toolbox](#)

**Registration Open**

**Contact**  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

**Registration Notes**  
A non-refundable application fee of \$50 is required to register for this trip.

[Register](#)  
20 spots available

[Trip Details](#)    [Trip Updates \(2\)](#)    [Comments \(0\)](#)

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[Participant Page](#)  
[Participant Page](#)

This page is also used for the general public to view. It allows them to easily register for

the opportunity if a registration instance was provided.

The screenshot shows a web page titled "China Mission Trip" under the heading "Fundraising Opportunity - Public". The page is part of a "Rock Solid Church Demo" website. The navigation bar includes "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and "Hello Alisha". The main content area features a large image of the Great Wall of China, the dates "September 10, 2023 to October 08, 2023", and the location "Beijing, China". A description states: "A small team will be traveling to China to help support churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This trip will have a huge impact for the locals as well as those attending." Below the image is a "Donate to a Participant" button. To the right, there are tabs for "Trip Details", "Trip Updates (2)", and "Comments (0)". A registration box on the left includes a "Registration Open" status, contact information for Jenny Michaels (jenny@rocksolidchurchdemo.com), and a "Register" button with "20 spots available". The main text area contains placeholder Lorem Ipsum text.

Fundraising Opportunities can also optionally be configured with a Content Channel for providing updates. When configured, a new tab will be shown to display these updates.

This screenshot shows the same "China Mission Trip" page, but with the "Trip Updates (2)" tab selected. The page layout is identical to the previous screenshot, but the main content area now displays two update entries. The first update is titled "Update 1 - A Big Day" and the second is "Update 2 - Progress Update". Both updates contain placeholder Lorem Ipsum text. The "Registration Open" status and "Register" button remain visible on the left side of the page.

Another optional setting is to allow commenting on the opportunity. This tab will

display a Rock notes control. Keep in mind that this feature currently doesn't allow for approving comments and does not email when new comments are added.

The screenshot shows a fundraising page titled "China Mission Trip" on a website for "Rock Solid Church Demo". The page includes a navigation bar with links like "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and "Hello Ted". The main content area features a header for the trip, a date range of "September 10, 2023 to October 08, 2023", and a location of "Beijing, China". A description states that a small team will be traveling to China to support churches and work as English teachers. Below this is a "Fundraising Progress" section for participant "Ted Decker", showing a progress bar and a total of "\$846.00". A "Registration Notes" section mentions a \$50 non-refundable application fee and 20 spots available. A "Comments (0)" section shows a comment from Ted Decker: "So glad for the opportunity to lead this trip!". The footer includes "Powered by: Rock RMS" and the address "3120 W Cholla St Phoenix, AZ 85029-4113".

Each opportunity participant has a personalized page that they can share with others to help generate interest and help encourage funding.

As pictured below in green, red and yellow, the participant can use this page to track documents that are needed for the trip and, if configured, launch a workflow to upload those documents. These are really just group requirements that have been added to the fundraising group. They could be used to track things like documents, attendance in classes or background checks. In this example, Ted has a driver's license on file but hasn't provided his passport yet. He hasn't submitted his trip insurance either, but it's not due until a date in the future, so Ted is currently in a warning state.





## Fundraising Participant Profile

Rock Solid Church Demo [New Here?](#) [Resources](#) [Connect](#) [Give](#) [Blog](#) [Calendar](#) [Watch](#) [Hello Ted](#)

### China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [China Mission Trip](#) / Fundraising Participant



#### Ted Decker's Trip

September 10, 2023 to October 08, 2023  
Beijing, China

Help me make a difference on the other side of the world!

[f](#) [t](#) [e](#)

[Trip Page](#)

[Edit Profile](#)

#### Ted Decker

**Fundraising Progress**

\$846.00

[Make Payment](#)

#### Participant Checklist

Below are tasks required for this Trip.

**Driver's License Required**  
License on File

A copy of your driver's license is needed.

**Passport Required**  
Valid Passport Not On File

We'll need a copy of your passport for this trip. You can provide it here or bring it to the office.

[Upload Passport](#)

**Trip Insurance Due: 7/1/2023**  
Requirement Met With Warning

This trip requires trip insurance or a waiver of liability.

Trip Insurance or Waiver

[Trip Updates \(2\)](#) [Contributions](#)


#### Update 1 - A Big Day

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#### Update 2 - Progress Update

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#### Comments



**Ted Decker**  
Group Member Note - 25 minutes ago

Can't wait to start this trip!

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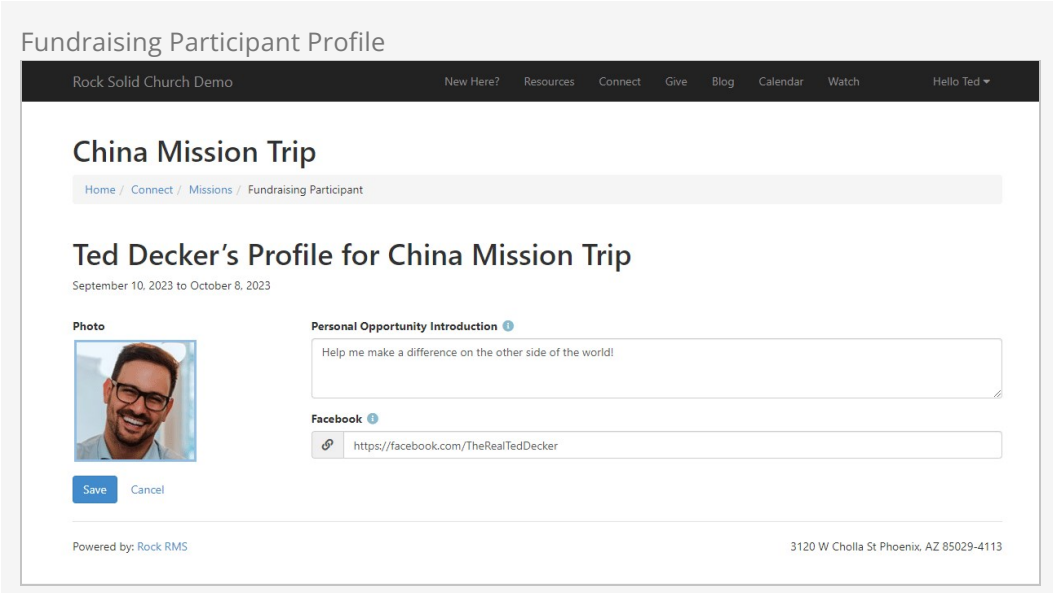
### Viewing Group Requirements

Requirements are only visible to the individual participants, people in their family (if the fundraising group has a *Participation Type* of Family) and trip leaders.

Note, this means that if Ted is logged in, he should see everyone in his family who is in the group even if he is not in the group himself. This allows him to view the details for his children and make payments.

Each participant can provide a custom opportunity introduction and edit their profile image from their personalized page. This block can also be configured to edit specific

person attributes if you wish, such as the Facebook example pictured below.



The screenshot shows a web interface for a fundraising participant profile. At the top, there is a navigation bar with the text "Rock Solid Church Demo" on the left and "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and "Hello Ted" on the right. Below the navigation bar, the main heading is "China Mission Trip". Underneath this heading is a breadcrumb trail: "Home / Connect / Missions / Fundraising Participant". The main title of the profile is "Ted Decker's Profile for China Mission Trip", with a subtitle indicating the dates "September 10, 2023 to October 8, 2023". On the left side, there is a "Photo" section with a placeholder image of a man with glasses and a beard. Below the photo are "Save" and "Cancel" buttons. To the right of the photo is a "Personal Opportunity Introduction" section with a text input field containing the text "Help me make a difference on the other side of the world!". Below that is a "Facebook" section with a social media icon and a text input field containing the URL "https://facebook.com/TheRealTedDecker". At the bottom of the profile, it says "Powered by: Rock RMS" on the left and "3120 W Cholla St Phoenix, AZ 85029-4113" on the right.

If the person logged in is the participant, they can also view the gifts that have been given near the bottom of the page by selecting *Contributions*.

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [China Mission Trip](#) / Fundraising Participant



### Ted Decker's Trip

September 10, 2023 to October 08, 2023  
Beijing, China

Help me make a difference on the other side of the world!



[Trip Page](#)

[Edit Profile](#)

Ted Decker

Fundraising Progress

\$846.00



[Make Payment](#)

### Participant Checklist

Below are tasks required for this Trip.



Driver's License Required  
License on File

A copy of your driver's license is needed.



Passport Required  
Valid Passport Not On File

We'll need a copy of your passport for this trip. You can provide it here or bring it to the office.

[Upload Passport](#)



Trip Insurance Due: 7/1/2023  
Requirement Met With Warning

This trip requires trip insurance or a waiver of liability.

Trip Insurance or Waiver

[Trip Updates \(2\)](#)

[Contributions](#)

### Contributions

Date	Name	Address
12/22/2022	Alisha Marble	12345 W St Lane Phoenix, AZ 85029
1/23/2023	Sam Hanks	321 Elm Street West Phoenix, AZ 85012
3/14/2023	Ben Jones	45678 N Lane Street Phoenix, AZ 85047

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029-4113

If someone doesn't have a link to a participant's profile page, they can choose to give from the opportunity detail page and select the participant they would like to fund.

Donate to a Participant

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

## Donate to China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [China Mission Trip](#) / Fundraising Donation

**Fundraising Opportunity**  
China Mission Trip

**Participant \***

Jenny Michaels ▾

Cindy Decker  
Jenny Michaels  
Ted Decker

Powered by: Rock RMS      3120 W Cholla St Phoenix, AZ 85029-4113

If the fundraising group is set up for families, and if more than one person from the same family is in the group, you can give to the family as a whole.

Donate to a Family

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

## Donate to Kenya Orphanage Building Project

[Home](#) / [Connect](#) / [Missions](#) / [Kenya Orphanage Building Project](#) / Fundraising Donation

**Fundraising Opportunity**  
Kenya Orphanage Building Project

**Participant \***

Decker Family (Ted & Cindy) ▾

Alisha Marble  
Decker Family (Ted & Cindy)  
Trish Lowe

Powered by: Rock RMS      3120 W Cholla St Phoenix, AZ 85029-4113

After selecting a participant and clicking **Next** from the page pictured above, the person will be brought to the *Fundraising Transaction Entry* page pictured below. There are many block settings for this block, so be sure to review them to ensure this process matches your organization's needs.

Donate to a Participant

## Fundraising Transaction Entry

[Home](#) / [Connect](#) / [Missions](#) / [China Mission Trip](#) / [Fundraising Donation](#) / Fundraising Transaction Entry

### 1 Fundraising Opportunity

China Mission Trip

**Fundraising Goal**  
\$1,500.00

### 2 Participant

Jenny Michaels

**Amount Remaining**  
\$942.00

### 3 Contribution Information

#### Donation Amount

\$ 100.00

### 4 Donor Information

#### Name

Ted Decker

#### Address

11624 N 31st Dr

Address Line 2

Phoenix

AZ

85029-3202

#### Email

teddecker@rocksolidchurchdemo.com

### 5 Give Anonymously

### 6 Payment Information

Card  Bank Account

#### Card Number

1111222233334444

VISA   

#### Expiration Date

Apr / 2026

#### Card Security Code

123

Enter a different billing address

### 7 Previous

### 8 Next

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029-4113

### 1 Fundraising Opportunity

The name of the fundraising opportunity comes from the *Opportunity Title* group attribute that was set when the fundraising group was created.

### 2 Participant Information

Based on the person's selection in the prior screen (see prior screenshot above) we see the participant's name, their total fundraising goal and how much they have left to raise to meet the goal. If giving to a family, the family's name will appear here, and the amounts displayed will be for the family as a whole.

### 3 Contribution Information

When a participant is selected from the prior screen, the *Financial Account* associated with the fundraising group (set as a group attribute) is passed to this page in the URL. The amount entered here will go to that account. Only Public accounts can be used by this block.

If this page is accessed directly without first selecting a participant, then

multiple *Donation Amount* fields will be present, one for each Public account you have. This can be changed in the block's settings by specifying the Accounts that should be used. The block settings also provide an option to allow the person to choose additional accounts if needed, but this only applies if an AccountId is not present in the URL.

**4 Donor Information**

This information will be pre-filled for the person if they're known (i.e., logged in). The type of address to use can be changed in the block's settings.

**5 Additional Options**

The block settings allow you to remove the prompt for email, and also give you the option of asking for a phone number. You can also disable the option for the person to give anonymously.

**6 Payment Information**

This is where the person will provide their card or bank account information. The title of this area can be changed in the block settings.

**7 Previous**

This will take the person back to the prior screen, where they can select a different participant if needed.

**8 Next**

Clicking  will take the person to a confirmation screen. The header and footer text of the confirmation screen can be customized in the block settings.

## Fundraising Opportunity Configuration

As we mentioned earlier, Rock's fundraising features are driven by a set of group and group member attributes. Let's take a look at these settings to see how you can customize each fundraising opportunity to meet your individualized needs.

Keep in mind the group and group member attributes below are specific to a single fundraising opportunity (each one is a group). This allows you to have several types of opportunities, each with their own unique settings and configuration.

### Group Attributes

Below is a detailed discussion of each setting for the group that represents the opportunity (Mission Trip, Internship Season, etc.)

Name	Type	Description
Opportunity Title	Text	The group name is mainly used internally. This attribute of <i>Opportunity Title</i> is what will show on the external site when opportunities are listed.
Opportunity Date Range	Date Range	Used to show the start and end dates of the opportunity. For a mission trip, we would recommend that you put the trip dates here. This date range doesn't control when the opportunity is shown externally; it just describes when the

Name	Type	Description
		opportunity occurs.
Opportunity Location	Text	This is the location of the opportunity. For a mission trip, this would be the city or country. Feel free to leave this blank if it doesn't make sense in your situation.
Opportunity Summary	Memo	A brief description of the fundraising opportunity.
Opportunity Photo	Image	If a picture is worth a thousand words, then we'd better include one.
Opportunity Details	HTML	Now we get to the nitty-gritty of what this opportunity is all about.
Individual Fundraising Goal	Currency	This field determines how much money each person is trying to raise. If each person in the opportunity is raising different amounts, you can provide those unique amounts on their group member attribute (discussed below).
Opportunity Type	Defined Value	<p>The opportunity type helps group similar opportunities. Rock ships with three options (<i>Trip</i>, <i>Internship</i> and <i>Project</i>). You can add your own under <a href="#">General Settings &gt; Defined Types &gt; Fundraising Opportunity Type</a>.</p> <p>This setting has two roles:</p> <ul style="list-style-type: none"> <li>• Acts as a filter for opportunities on the external website (e.g., show only mission trips on this list)</li> <li>• Provides a label to describe the opportunity type. For instance, should this opportunity be referred to as a <i>Trip</i>, <i>Project</i>, etc.</li> </ul>
Update Content Channel	Content Channel	You may want to provide updates on the status of your opportunity. For example, if your opportunity is a mission trip, you might want to file trip reports. Or if it's a project, you might want to provide updates on the overall funding level or project status. This setting allows you to configure a content channel to manage these updates. If you don't provide a channel the updates tab will be hidden.
Enable Commenting	Boolean	Sometimes you want comments, sometimes you don't. When enabled, a notes block will be added to the opportunity detail. Just remember that there is no automatic email when new notes/comments are left and no approval process. These features may be added in a future release.
Registration Instance	Number	This is what ties in a registration to the fundraising opportunity. You must provide the registration instance ID (currently there isn't a registration instance picker).
Registration Notes	Memo	This short description will show up on the opportunity details page to provide any quick notes about the

Name	Type	Description
		registration (e.g., <i>A \$200 deposit is required</i> ).
Allow Individual Disabling of Contribution Requests	Boolean	Opportunity participants can have their own personalized fundraising pages. Some participants may want to use this page to share the opportunity and provide updates, but not want to communicate the financial needs. This setting allows you the option to allow them to disable the sharing of their funding status.
Allow Individual Editing of Fundraising Goal	Boolean	This allows individuals to set their own fundraising goals from their external fundraising profiles. The default for this is not to allow editing.
Cap Fundraising Amount	Boolean	This setting determines if an individual can raise more money than their goal.
Financial Account	Financial Account	This configures which financial account the fundraising opportunity should use to track their money.
Allow Donations Until	Date Picker	An inclusive date that specifies how long to allow donations to participants. Once this date passes no more donations will be accepted by Rock.
Show Public	Boolean	This flag determines whether the opportunity should be displayed on the external website. Since it's common for an opportunity to be displayed long before it starts, and for a brief time after it ends, this flag is used to determine when an opportunity should be displayed.
Participation Type	Single-Select	This is where you select whether the participant is an individual or a family. This controls much of how people interact with the group, as noted throughout this chapter.

Since many of these attributes drive the external display of the opportunity, let's look at an example and see where each value is shown.




## External Display of Attributes

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

# 1 China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [China Mission Trip](#)



2

September 10, 2023 to October 08, 2023 3  
Beijing, China 4

5 A small team will be traveling to China to help support churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This trip will have a huge impact for the locals as well as those attending.

[f](#) [t](#) [e](#)

[Donate to a Participant](#) [Trip Details](#) 7 8  
Trip Updates (2) Comments (0)

9 **Registration Open**

10 **Contact**  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

11 **Registration Notes**  
A non-refundable application fee of \$50 is required to register for this trip.

[Register](#)

12 20 spots available

6 rem ipsum dolor sit amet, consectetur adipiscing elit; sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Dui faucibus in ornare quam viverra orci sagittis. Etiam non quam lacus suspendisse faucibus interdum posuere lorem. Sed nisi lacus sed viverra. Ornare aenean euismod elementum nisi quis eleifend. Id ornare arcu odio ut sem. Pulvinar neque laoreet suspendisse interdum consectetur libero. Pretium vulputate sapien nec sagittis aliquam malesuada. Ornare massa eget egestas purus. Egestas maecenas pharetra convallis posuere morbi leo urna molestie. Diam phasellus vestibulum lorem sed risus ultricies tristique. Mattis vulputate enim nulla aliquet porttitor lacus luctus. Ultrices in iaculis nunc sed augue lacus viverra vitae. Orci a scelerisque purus semper eget dui at tellus. Sed tempus urna et pharetra pharetra. Cras fermentum odio eu feugiat pretium nibh ipsum. Sed odio morbi quis commodo. Varius dui at consectetur lorem donec massa sapien faucibus et.

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### 1 Opportunity Title

### 2 Photo

### 3 Date Range

### 4 Location

### 5 Summary

### 6 Details

### 7 Trip Updates

### 8 Comments

### 9 Registration Status

This is determined by looking at the dates on the registration instance. If the registration is not yet open, the future opening date will be displayed.

### 10 Registration Contact

The contact comes from the Registration if it is configured.

### 11 Registration Note

### 12 Spots Available

This is calculated by looking at the number of registrant openings available for the registration.

## Group Member Attributes

The following group member attributes are available to help configure the opportunities.

Name	Type	Description
Individual Fundraising Goal	Currency	This allows you to provide an individual goal that is unique to each person. This attribute is only available to internal Rock administrators and cannot be edited by the individual.
Personal Opportunity Introduction	Memo	This is a short message that the person can provide to provide a personalized note on their individual trip page.
Disable Public Contribution Requests	Boolean	This allows an individual to hide their name when listing people to fund. It also hides many of the features on their personal opportunity profile that are intended to encourage someone to give. This allows them to use their personal page to communicate updates if they are self-funding the opportunity.

## Fundraising Financial Transactions

Financial Transactions that are created from the fundraising features will all default to the *Contribution* type. The account for the transaction will be applied based on the opportunity group setting. It is possible to change the transaction type to a different value than *Contribution*. To do so, you'd need to create a new page with a *Transaction Entry* block on it. This block has a block attribute to set the transaction type on the advanced setting panel. You'd then need to configure your fundraising pages to use this new page for processing financial transactions.

### Moving Transactions

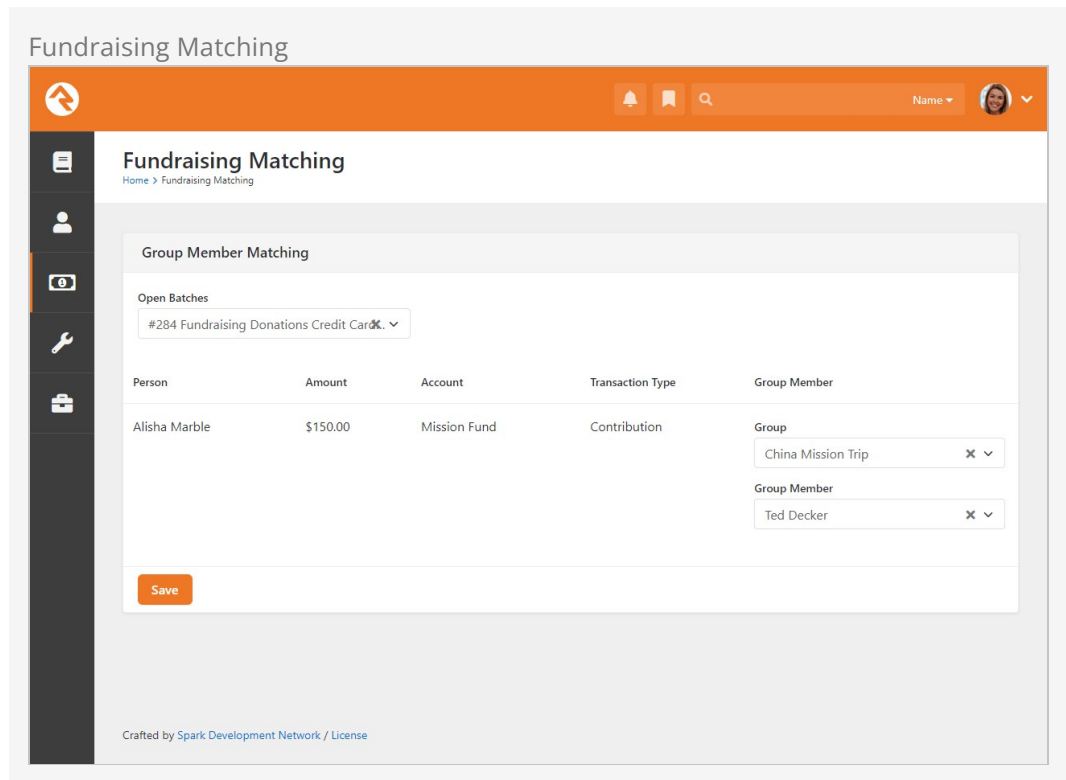
If a participant moves from one fundraising group to another, you can easily transfer the donations that were already made. See the [Moving Group Members](#) section above for details.

In Rock, financial transactions can be tied to another entity (event registration, etc.). Donations that are made as a part of fundraising will be tied to the *Group Member* of the *Fundraising Opportunity* group. There is no financial linkage to registrations. This is an important point to understand as there is no way to link money coming in to a registration with that given as a fundraising opportunity. Below we cover several ways you can configure event registration to work with the fundraising tools for maximum impact.

## Financial Transactions Matching

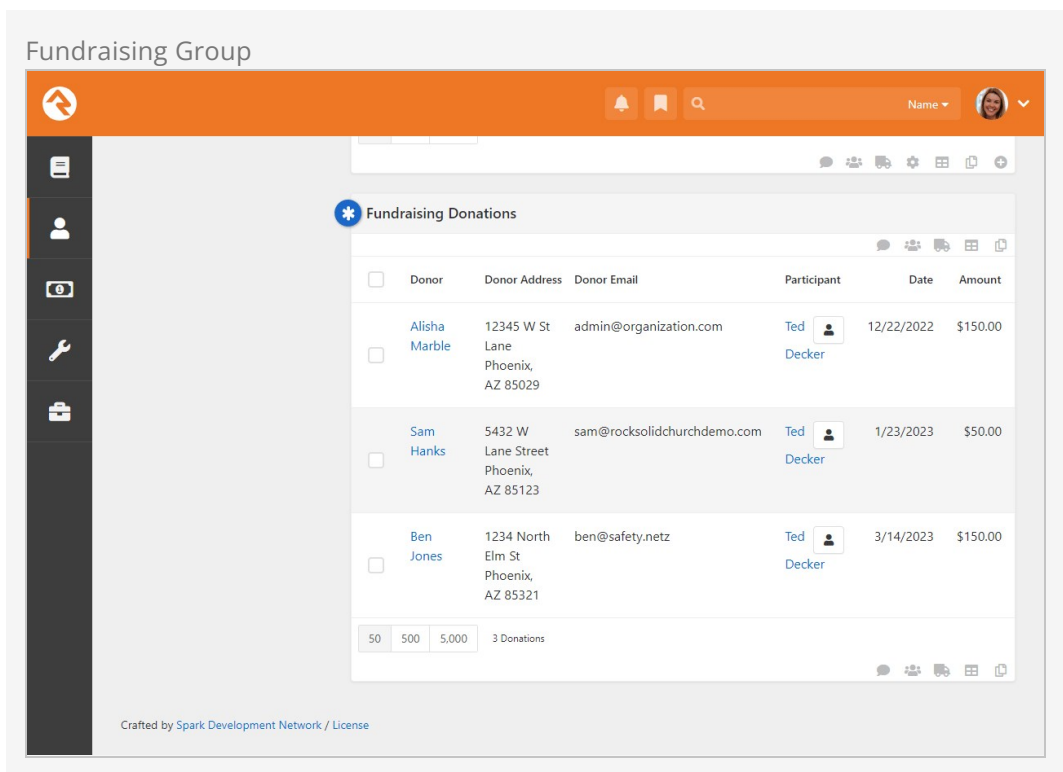
We've already discussed that Financial Transactions for fundraising are Contributions that are tied to the Group Members of the Fundraising Opportunity Group. The Rock tools mentioned above do all of the connecting of the group member to the transactions. You might be asking, "What about checks or gifts that need to be entered manually?" And that...is a GREAT question!

After entering contributions (either scanning and matching or through another process), you can link a contribution to a fundraising opportunity participant using the *Fundraising Matching* page found under `Finance > Fundraising Matching`.

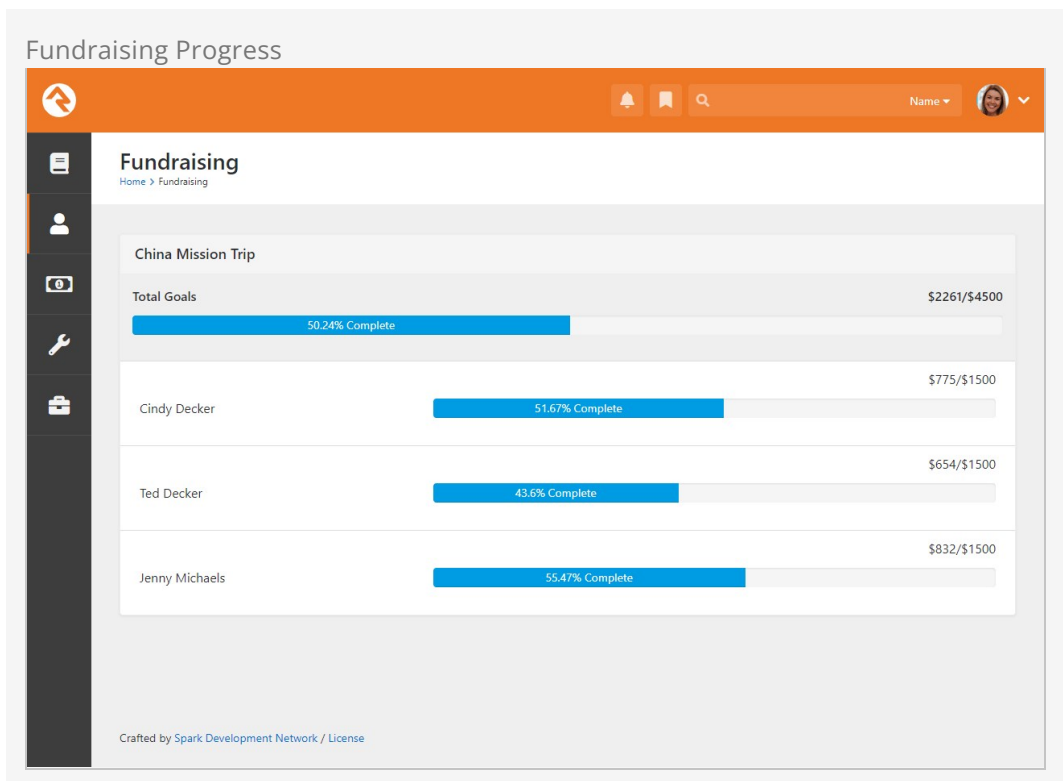


## Fundraising Progress

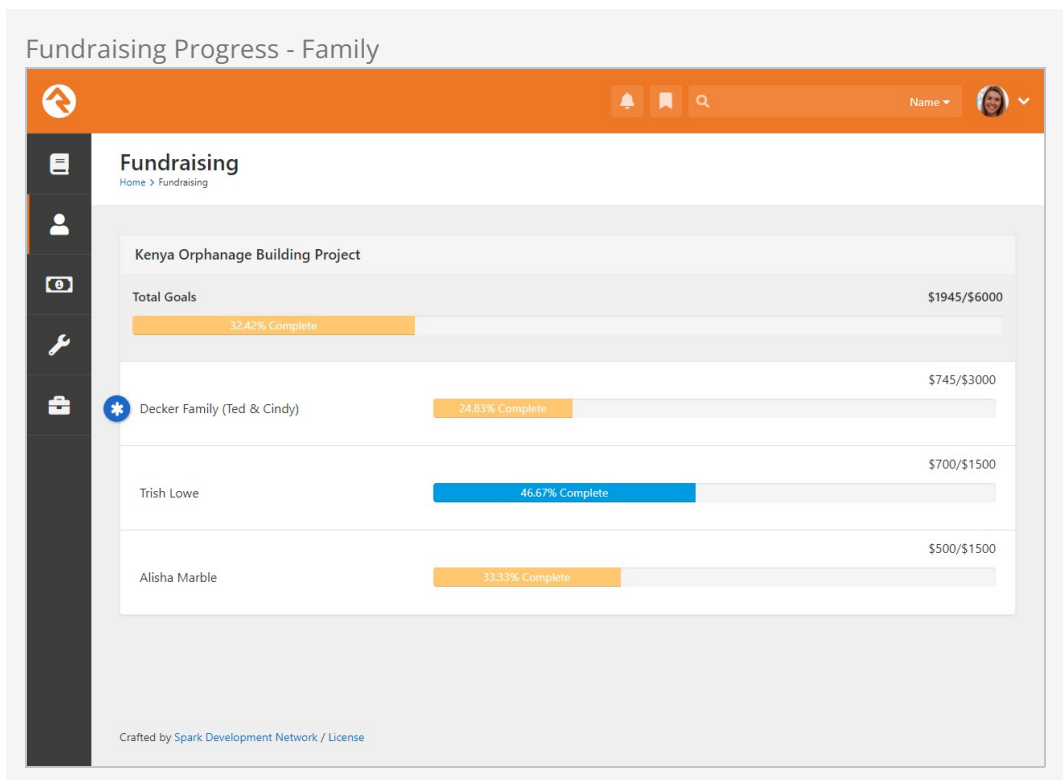
You can quickly track the progress of fundraising campaigns for fundraising groups. Start by going to the *Group Viewer* page (`People > Group Viewer`). From this screen you can view the individual fundraising donations for each group member, below the list of group members.



You can also quickly view the group's overall fundraising progress. Click the  button to display a snapshot of both the combined and individual fundraising progress.



If the fundraising group's *Participation Type* is Family, then the chart combines family members into a single line as pictured below.



## How Registration Can Work with Fundraising

As mentioned above, Rock's registration and fundraising tools were meant to work together. That said, financial transactions from these two features don't tie directly together. Below are some use cases to show how you can get these two features to sing in perfect harmony.

### Basic Mission Trip

In a basic scenario you would create a new event registration to capture information about the trip participant and have the registrant drop directly into the fundraising group. To enable this direct link to the fundraising group, be sure you define a linkage on the registration instance to the group. The fundraising blocks are smart enough to use these linkages in the registration process.

#### Pro Tip

You can actually provide multiple linkages to have individuals drop into different groups. The linkage name will be used on the registration button on the fundraising page.

### Mission Trip with No Cost Application Process

Say you wanted to configure a mission trip in which a person needed to register and be approved before they could begin fundraising. You could use an event registration to take their application information. Once their application was approved, they would be added to the *Fundraising Opportunity* group (using the group placement tools would help with this) and they could then start their fundraising. They would use the same

*Donation* page to submit their own payments for the trip.

#### **Mission Trip with Required Costs Paid by the Participant**

Now let's say that the trip costs \$1,000 and that \$200 is due upfront and should be paid by the trip participant. Also, suppose that there is an optional post trip safari that a person could choose to add. In this case, you would set up an event registration for \$200 with an optional fee for the safari. You would then set up the *Fundraising Opportunity* group to have an *Individual Fundraising Goal* of \$800.

# Group RSVP

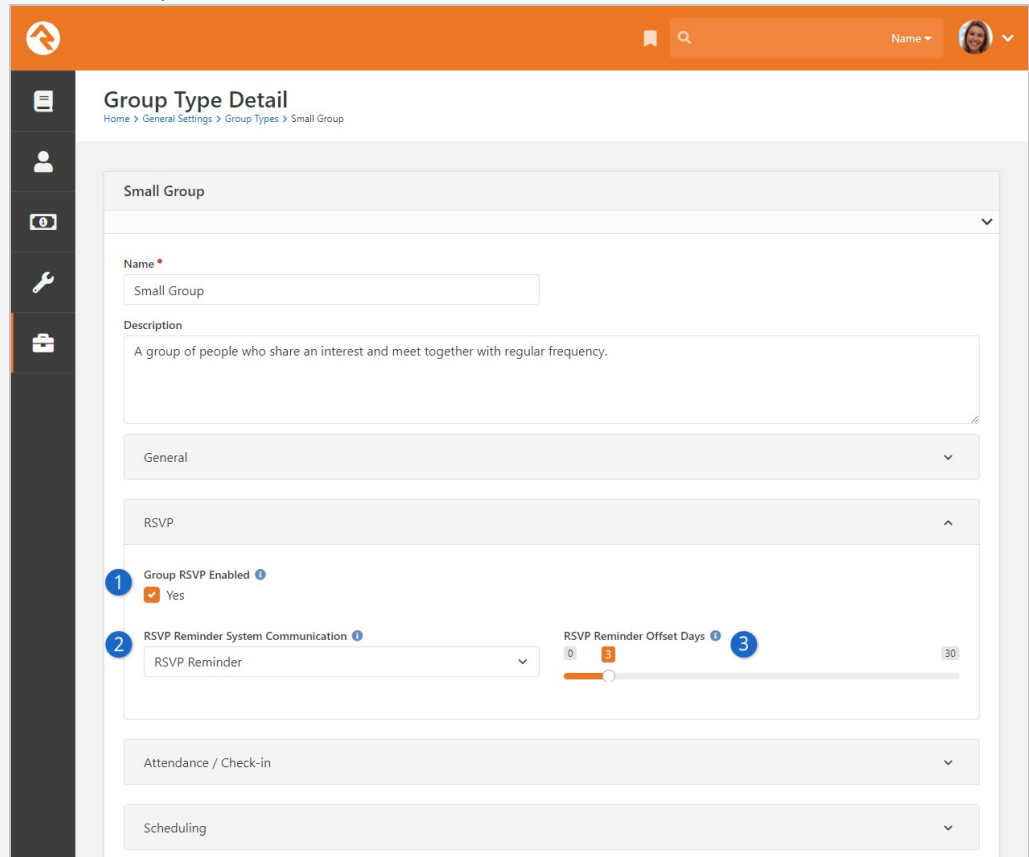
If you're hosting an event, class or other type of gathering, it can be very important to know how many people plan to attend. The expected attendance can impact things like the location, the refreshments and even how many chairs you'll need. Those are just some of the reasons why Rock comes with an RSVP system that lets you track whether invitees actually plan on attending your function.

If this brings Rock's event registration features to mind, you're not too far off. You already know how robust and flexible event registration features can be, but sometimes it might be a little more than you need. Group RSVP is for when you just need to know who's coming, plain and simple.

## Enable Group RSVP

The RSVP function is enabled in group type settings, making RSVP features available to any groups within that type. All RSVP features are tied directly to a group. That means you must have a group created before you can use RSVP. The group doesn't need to have any members, but it needs to exist so individuals who accept your RSVP can be added to it.

To enable RSVP for a group type, navigate to `Admin Tools > General Settings > Group Types` and open the RSVP settings for the group type.



**1 Group RSVP Enabled**

This checkbox must be selected to access RSVP features for any group of this type. Once enabled, the other two fields related to RSVP will appear.

**2 RSVP Reminder System Communication**

Select the System Communication that should be used to send reminders to invitees who have Accepted. Only communications in the “RSVP Confirmation” category will be available for selection. The selected communication will automatically be used with all groups of this type. Leave this blank to set the System Communication on each group individually.


**3 RSVP Reminder Offset Days**

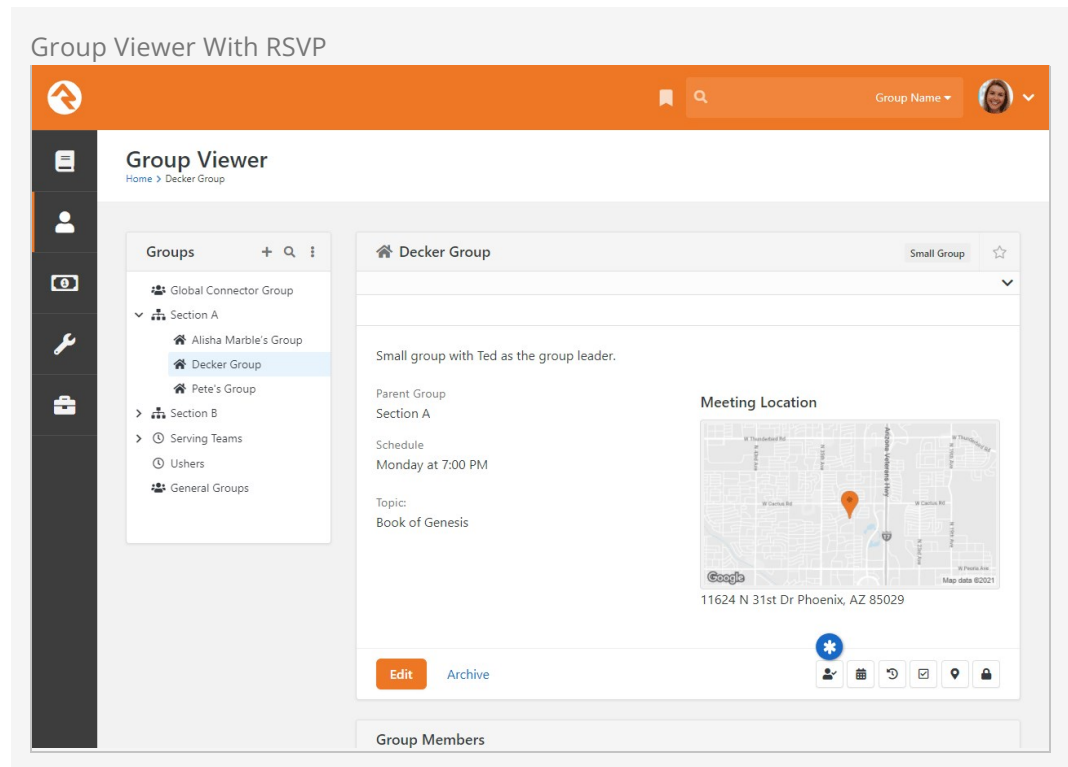
Indicate how many days before the event the reminder should be sent. Like the communication selection, you won’t be able to change the offset days for individual groups if you set a value here. All groups of this type will inherit the offset days set at the group type level. Set this to '0' days if you instead want to manage the reminder offset days on each group individually.


## RSVP - Group Viewer

After you’ve enabled RSVP for a group type, you’ll see a couple of changes when viewing groups of that type from the *Group Viewer* page.



First, you'll notice the addition of a new  icon that will take you to the *Group RSVP List* page, where you can view or add occurrences. We'll talk more about occurrences in the RSVP Occurrences section below.



Second, you can  a group to access the *RSVP Reminder System Communication* and *RSVP Reminder Offset Days* for that group. These settings are only available for groups where RSVP has been enabled on the group type.

## Group Viewer RSVP Reminder Settings

The screenshot displays the 'Group Viewer' interface for the 'Decker Group'. The left sidebar shows a navigation menu with 'Decker Group' selected. The main content area shows the group's settings, including the name 'Decker Group', 'Active' and 'Public' checkboxes, and a description 'Small group with Ted as the group leader.' The 'RSVP' section is expanded, showing 'RSVP Reminder System Communication' set to 'RSVP Reminder' and 'RSVP Reminder Offset Days' set to 5. The 'Save' button is highlighted in orange.


### 1 RSVP Reminder System Communication

Select the *System Communication* that should be used to send reminders to invitees who have *Accepted*. Only communications in the “RSVP Confirmation” category will be listed for selection. If you already set this at the group type level, then you won’t be able to change it here.

### 2 RSVP Reminder Offset Days

Indicate how many days before the event the reminder should be sent. Like the communication selection, you won’t be able to change the reminder settings for individual groups if they’re already configured for the group type.

## Group RSVP List

Clicking the  icon takes you to the *Group RSVP List* page. It will be empty when you first start, but after you add a few occurrences to the list (see RSVP Occurrences) you’ll quickly see how useful this page is. Let’s take a look.

Date	Schedule	Location	Response Progress Bar	Invited	Accepted	Declined	No Response	RSVP Detail Icon
10/25/2021	Monday at 8:00 PM	the Garage		34	19	9	6	
10/18/2021	Monday at 8:00 PM	the Garage		34	18	11	5	
10/11/2021	Monday at 8:00 PM	the Warehouse		34	24	6	4	
10/4/2021	Monday at 8:00 PM	the Garage		34	15	10	9	
9/27/2021	Monday at 8:00 PM	the Garage		34	24	9	1	
9/20/2021	Monday at 8:00 PM	the Warehouse		34	16	8	10	

**1 Date**  
The date of the occurrence is shown in the first column. You can use the *Filter Options* near the top of the block to narrow the list by date.

**2 Schedule**  
The check-in schedule associated with the occurrence, if applicable, is shown here.

**3 Location**  
If a location has been assigned to the occurrence you can see it here.

**4 Response Progress Bar**  
This column gives you a graph of RSVP response data:

- Green = Accepted
- Red = Declined
- Blank/Gray = No Response

**5 Invited**  
You can view the count of all invitees for the occurrence, so you know how many people were invited.

**6 Response Statistics**  
In this part of the block, you can see how many people have replied to the RSVP with either an Accept or Decline, and a count of how many haven't responded.

**7 RSVP Detail Icon**  
Click the icon to access the *RSVP Detail* page (see *RSVP Detail*).

## RSVP Occurrences

Let's look at how to add an occurrence to the RSVP List. You'll need to have at least one occurrence set up for the group before you can start sending your RSVP emails.

### Add Occurrence

Group RSVP Detail

Home > Pete's Group > Group RSVP List > Group RSVP Detail

RSVP Detail Pete's Group

1 Name  
Monday Night Worship Event

2 Date  
09/27/2021

3 Check-in Schedule  
Monday at 8:00 PM

4 Location  
Bldg 1

5 Hide Additional Fields

6 Custom Accept Message

6 Custom Decline Message

7 Show Decline Reasons

Available Decline Reasons

- Illness
- Vacation
- Schedule Conflict
- No Childcare Available
- Other

Save Cancel

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- 1 Name**

You can optionally set a unique name for an occurrence. This applies only to the occurrence being viewed. Invitees will see the name you provide on the external website when they *Accept* or *Decline*.
- 2 Date**

Set the date of the occurrence.
- 3 Check-in Schedule**

Choose the check-in schedule associated with the occurrence, if applicable.
- 4 Location**

Select the location of the occurrence.
- 5 Show/Hide Additional Fields**

Click *Show Additional Fields* to reveal the settings for custom messages and decline reasons (listed below).
- 6 Custom Accept/Decline Messages**

You can customize the message invitees see when they respond to your RSVP request. We'll show you what that looks like in the Responding to RSVP Requests section.

## 7 Show Decline Reasons


If the *Show Decline Reasons* box is selected, then invitees can give a reason for declining. You can choose which reasons are available to invitees from the list of *Available Decline Reasons*.

### Decline Reasons

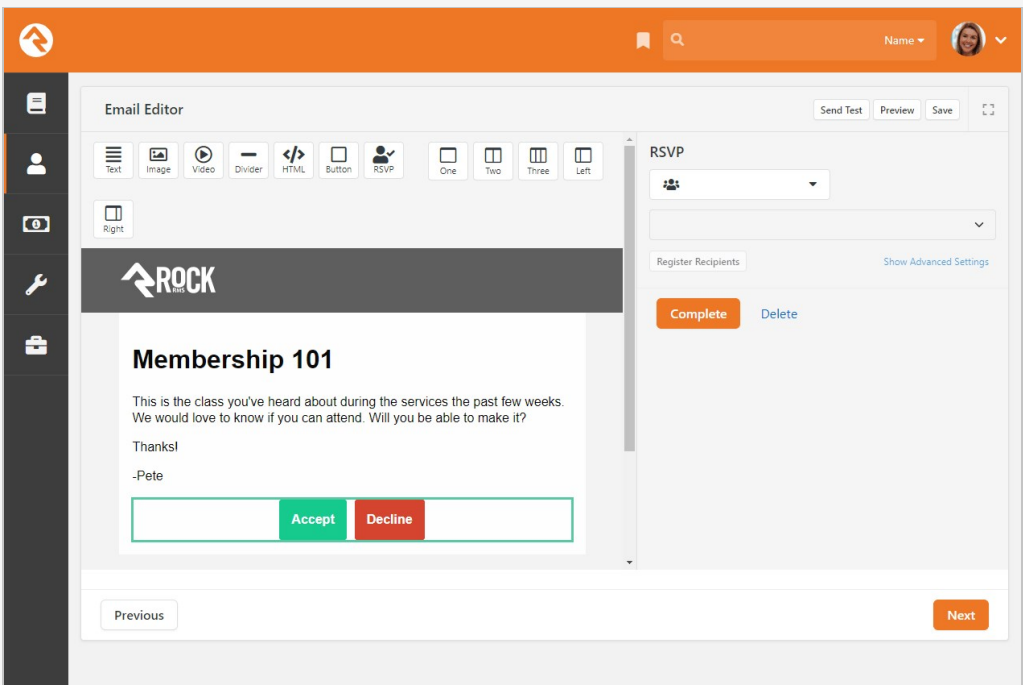
The list of *Available Decline Reasons* can be maintained from the [Admin Tools > General Settings > Defined Type](#) list under *Group RSVP Decline Reason*.

## RSVP Email Requests

Now that we have an occurrence set up, we're ready to send out some invitations.

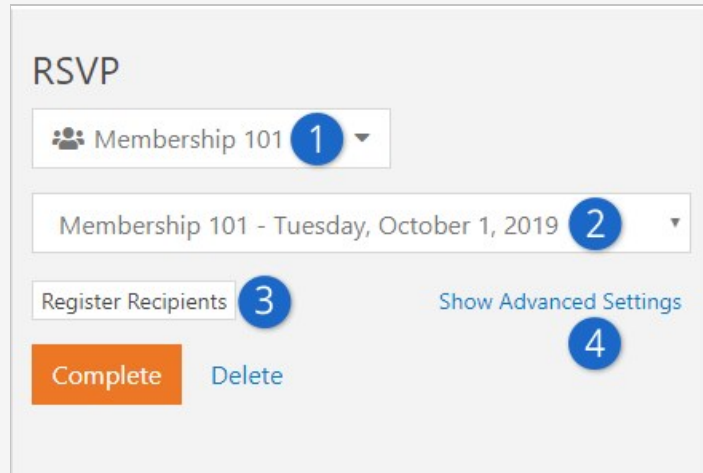
Adding an RSVP request to an e-mail is as simple as clicking and dragging the RSVP tool button (look for the  icon) into your email. If you're not sure how to get to this point, check out the Communication Wizard section in the [Communicating With Rock](#) guide.

Add RSVP To New Communication



After the RSVP buttons have been added to the body of your email, use the panel on the right to select the group and occurrence.

## Add Occurrence to Email



RSVP

Membership 101

Membership 101 - Tuesday, October 1, 2019

Register Recipients

Show Advanced Settings

Complete Delete

- 1 Select Group**

Choose the group associated with the occurrence. Only group types with RSVP enabled will be in the list of options.
- 2 Select Occurrence**

Pick the occurrence for which you want to send an email. The RSVP responses you receive will be for this occurrence.
- 3 Register Recipients**

Click the `Register Recipients` button to keep track of RSVP data for all the recipients of your email. If this button isn't used, only people who have responded to your RSVP request will appear in the *RSVP List* or *RSVP Detail* pages.
- 4 Show Advanced Settings**

You can use the advanced settings to customize how the RSVP buttons are shown to invitees.

## RSVP Detail

Now that we've sent our email, we need to monitor the responses. We'll do this from the *RSVP Detail* page, which you can get to by clicking an occurrence from the *RSVP List* page.

The detail block at the top of the *RSVP Detail* page shows the occurrence details and a graph of responses. The list block at the bottom of the page shows your invitees and their responses.

RSVP Detail Page

**Group RSVP Detail**  
Home > ASU Student Group > Group RSVP List > Group RSVP Detail

RSVP Detail ASU Student Group

Name  
Special Meeting

Date  
11/6/2022

Location  
the Warehouse

Check-in Schedule  
Weekly: Sundays at 10:30 AM

**Edit**

**Invitees**

Filter Options

<input type="checkbox"/>	Invitees	Accept	Decline	Decline Reason	Decline Note
<input type="checkbox"/>	Sam Hanks	<input checked="" type="checkbox"/> Accept	<input type="checkbox"/> Decline		
<input type="checkbox"/>	Ty McClintock	<input type="checkbox"/> Accept	<input checked="" type="checkbox"/> Decline	No Childcare Available	Child has the flu
<input type="checkbox"/>	Paul Smith	<input checked="" type="checkbox"/> Accept	<input type="checkbox"/> Decline		

50 500 5,000 3 RSVP Attendees

**Save** **Cancel**

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Not only can you view responses, but you can also update responses or add decline notes if you need to. This ensures you always have accurate information, especially if the invitee responds (or changes their response) by phone or in person.

If you didn't turn on the *Show Decline Reasons* option for the occurrence, then the *Decline Reason* and *Decline Note* columns won't be shown.

### Missing Invitees?

If you used the **Register Recipients** button when sending your email, then everyone from your email will be on this list. Otherwise, you'll only see people who have responded.

## Responding to RSVP Requests

It may be helpful for you to know what individuals will be seeing and doing after they receive your RSVP email.

Clicking either Accept or Decline in the email will bring the invitee to your external site. What happens at that point depends on how you've set up your group, occurrence and

email.

### Public Group Member Attributes

When adding a member attribute to either a group or group type, you'll notice a *Public* setting. This setting controls whether the member attribute is included as part of the RSVP response process.

The screenshot shows a web interface titled "Enable Public Attributes" for editing a group member attribute. The attribute is named "Need Childcare?" and is associated with the group type "Small Group". The configuration includes the following fields and options:

- Name:** "Need Childcare?"
- Abbreviated Name:** "Childcare"
- Description:** "Do you need childcare during the event?"
- Categories:** A dropdown menu.
- Key:** "NeedChildcare"
- Field Type:** "Boolean"
- True Text:** "Yes"
- False Text:** "No"
- Control Type:** "Drop Down"
- Default Value:** A dropdown menu.
- Active:**
- Public:**
- Required:**  Require a value
- Show in Grid:**  Yes
- Show on Bulk:**  Yes

If the *Public* setting is enabled, then the group member attribute will be shown to RSVP invitees who accept your invitation. This allows you to gather additional information from the invitee beyond knowing that they plan to attend. We'll show you exactly what this looks like in the *Accept* section below.

### Accept

Invitees will be taken to your website after clicking "Accept" in the RSVP email they received. If you've attached any public member attributes to your group, then invitees will be asked to provide additional information (i.e., attribute values) accordingly.

For example, the *RSVP Response* page pictured below has a field labeled "Need Childcare?" with a drop-down menu below it. This prompts the individual to disclose if they need childcare before finalizing their RSVP acceptance. You can see how this particular member attribute was set up in the *Public Group Member Attributes* section above.



After the invitee clicks the `Accept` button on the page pictured above, they'll be brought to the acceptance confirmation page pictured below.

If you didn't add any public member attributes to your group, then the above page is skipped because there is nothing else the invitee needs to provide. Instead, invitees will be taken directly to the acceptance confirmation page pictured below when they click "Accept" from the RSVP email.

The generic acceptance message pictured above can be customized if desired (see RSVP Occurrences).

### Accepts Become Group Members

Rock will always add a person who accepts the RSVP into the group as a group member. This is especially needed when, for example, group member attributes are used. If an individual declines the RSVP invitation, they won't be removed from the group.

### Decline

Just like clicking Accept, you control what happens when a person clicks Decline.

If the person declines, and if you enabled decline reasons, then they'll be asked to

provide a reason.

The screenshot shows a web page titled "RSVP Decline With Reason". At the top, there is a navigation bar with links: "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and "Login". Below the navigation bar, the main heading is "RSVP Response". Underneath, there is a breadcrumb trail: "Home / RSVP Response". A yellow message box contains the text: "We're sorry you can't make it. Hope to see you next time!". Below this, there is a section titled "Please enter a reason below:" with four radio button options: "Family Emergency", "Have to Work", "On Vacation / Out of Town", and "Serving Elsewhere". A "Note" field is provided as a text input box. A blue "Save" button is located below the note field. At the bottom of the page, it says "Powered by: Rock RMS" and "3120 W Cholla St Phoenix, AZ 85029".

In the above example a custom decline message is displayed near the top of the block. If you didn't customize your decline message, then the generic message (pictured below) will appear instead.

If you didn't enable decline reasons, then the invitee will be taken directly to the page below from the email.

The screenshot shows a web page titled "RSVP Decline Message". At the top, there is a navigation bar with links: "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and "Login". Below the navigation bar, the main heading is "RSVP Response". Underneath, there is a breadcrumb trail: "Home / RSVP Response". A yellow message box contains the text: "Sorry to hear you won't make it, but hopefully we'll see you again soon!". At the bottom of the page, it says "Powered by: Rock RMS" and "3120 W Cholla St Phoenix, AZ 85029".

## Group RSVP Reminders

The *Send Rsvp Reminders* job will send a reminder to people who have accepted an RSVP invitation. Those who have declined or who haven't responded won't receive a reminder.

The job is ready for you to use out of the box, but it must be manually configured and is intended to be run daily. It will use the *RSVP Reminder System Communication* for the content, as configured at either the group or group type level. If you haven't selected a *System Communication* to use, then the job will not send a reminder.

## Sending Reminders using SMS

If a person's communication preference is SMS, and if the *System Communication* you use for RSVP reminders is fully configured for SMS, then the reminder will be sent as a text instead of an email.

Group RSVP Reminders Job

**Scheduled Job Detail**  
Home > System Settings > Jobs Administration > Scheduled Job Detail

**Add Service Job**

Name <sup>\*</sup>  Active

Description

Notification Status  Cron Expression <sup>?</sup>

Notification Emails <sup>?</sup>  Cron Description

<sup>1</sup> Job Type <sup>\*</sup>  Job History Count <sup>?</sup>

<sup>2</sup> Group Type <sup>?</sup>

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### 1 Job Type

For RSVP reminder communications, be sure to select the *Send Rsvp Reminders* job as pictured above. You'll then be prompted to select a group type.

### 2 Group Type

The *Send Rsvp Reminders* job will attempt to send reminders for all group types if one is not specified here. Otherwise, you can pick a group type if you only want to send reminders for groups of that type. In most cases you'll probably want to configure a single job, without picking a group type, for all of your reminders. You can create multiple jobs if needed but be sure every instance of the job has its own group type specified or you risk sending duplicate communications.

Don't forget that the *Send Rsvp Reminders* job will reference the configured *RSVP Reminder Offset Days* value (either from the group type or for a particular group) to determine when to send reminders for any given occurrence.