

JANUARY

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| 28 | 29 | 30 | | | | | | |



EVENT CALENDAR GUIDE

Welcome

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

Enable SSL

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

Event Registration Overview

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

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

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

The Basics of Event Registration

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

Registrar vs. Registrant

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

Registration Templates vs. Registration Instances

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

create *instances* of them that configure the settings that would be specific to the event (registration start and end dates, contact info, etc.). Still a little confused? Let's look at some examples.

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

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

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

The Role of Groups

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

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

A Typical Event Registration

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

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

Registration Walkthru

1

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

Summer Camp

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

How many registrants will you be registering?

- 1 +

[Next](#)

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2

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

Summer Camp

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

First Registrant

First Name * **Last Name ***

Birthday
 / /

Gender

Leader Preference

Cabin Preference

Additional Options

Camp Shirt

[Previous](#) [Next](#)

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Summer Camp

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Second Registrant

Alexis is in the same family as *

Katie Franks

None of the above



First Name *

Alexis

Last Name *

Decker

Birthday

Feb / 10 / 2008

Gender

Female

Leader Preference

Cindy Decker

Cabin Preference

With Katie Franks

Additional Options

Camp Shirt

Small (\$10.00)

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Summer Camp

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Third Registrant

Noah is in the same family as *

- Katie Franks
- Alexis Decker
- None of the above

First Name * **Last Name ***

Birthday
 / /

Gender

Leader Preference

Cabin Preference

Additional Options
Camp Shirt

Summer Camp

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Review Registration

Your Information

First Name *

Last Name *

Send Confirmation Emails To *

You are in the same family as *
 Katie Franks Alexis & Noah Decker None

Payment Summary

| Description | Amount |
|---------------------------------|-------------------------------------------|
| Katie Franks | \$ 200.00 |
| Camp Shirt-Small (1 @ \$10.00) | \$ 10.00 |
| Alexis Decker | \$ 200.00 |
| Camp Shirt-Small (1 @ \$10.00) | \$ 10.00 |
| Noah Decker | \$ 200.00 |
| Camp Shirt-Medium (1 @ \$10.00) | \$ 10.00 |
| Total | \$ 630.00 |
| | Total Cost \$630.00 |
| | Minimum Due Today \$300.00 |
| | Amount To Pay Today * \$ 630.00 |
| | Amount Remaining \$0.00 |

Payment Information

Name on Card

Credit Card #



Expiration Date / **Card Security Code**

Address

City **State** **Zip**

[Previous](#)

[Finish](#)

Summer Camp

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

Congratulations Alisha

You have successfully registered the following registrants for Summer Camp 2015:

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

Total Cost: \$630.00
Paid \$630.00 on 8/28/2015 (Ref #: T20150828140119273)
Balance Due: \$0.00

A confirmation email has been sent to AdminAdmin@safety.net. If you have any questions please contact at jenny@rocksolidchurchdemo.com.

Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

- 1 Step one: Tell us how many people you plan on registering. Technically, you'll only see this screen if you've enabled `Allow Multiple Registrants`. Otherwise you'll be limited to a single registrant. As you can see, Ted has selected three registrants.
- 2 And we're off! We'll start by entering the information required for the first child. In this case Ted has entered Katie's information.
- 3 Now we see the entry form for the next child. Let's pause here for a second and mention that while this case has one form for each registrant, Rock allows you to configure multiple entry screens for each registrant. OK, back to the registration. You'll see that Ted has entered Alexis' information. Notice how we've put an asterisk marking part the page. Since the registration was configured to *Ask if registrants are in the same family*, that's exactly what it's doing. This will help make sure that the data that is entered into Rock is consistent with the actual family structure of the individuals being registered.
- 4 Now it's Noah's turn. Again notice the family selection. Ted has selected that Noah is in the same family as Alexis.
- 5 Now it's time to pay up! Here we see a nice break down of the costs and fees. We have the opportunity to enter a discount code as well as enter the amount we wish to pay today. You'll also note that the registrar can enter their information here also. Like the registrants, they can select which family they belong to.
- 6 Done!

Registration Templates

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

General Settings

General Settings

Event Registration
Home > Summer Camp

Summer Camp Instance Registration Registrant

Add Category
Registration Template

Connection
General
Summer Camp

Summer Camp General

Name ¹ Active ²

Category ³

Details

Group Type Allow Multiple Registrants ⁵ Yes ⁵ Maximum Registrants ⁶

Group Member Role ⁴ Registrants In Same Family No Yes Ask ⁸ Registrar Options ⁷

Group Member Status Enable Wait List Yes ⁹

Notify ¹⁰ Registration Contact Add Person Note ¹¹ Yes Login Required ¹² Yes Allow Group Placement ¹³ Yes Group Followers Group Leaders

Set Cost On Template ¹⁴

Cost ¹⁵ Financial Gateway ¹⁷

Minimum Initial Payment ¹⁶ Batch Prefix ¹⁸

Registration Workflow ¹⁹ Required Signature Document ²¹ In-Line Signature Yes ²⁰ Allow External Updates to Saved Registrations ²⁰ Yes

Form(s)

Fees

Discounts

Terms/Text

Show Communication Settings

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

2 Active

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

3 Category

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

4 Group Type / Group Member Role / Group Member Status

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

5 Allow Multiple Registrants

Fairly straight forward.

6 Maximum Registrants

This limits how many people can register on a single registration.

7 Registrar Options

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

- **Prompt for Registrar** - This default setting displays the standard registration form and process.
- **Prefill First Registrant** - This setting auto-completes the registration with the first registrant's information. This is helpful when the registrants don't log in to register for the event but you still want to auto-complete their information.
- **Use First Registrant** - This setting also auto-completes the registration with the first registrant's information, but it also hides the registration panel during the *Review Registration* step of the process unless the form doesn't collect the registrant's email address. In this case, the registration panel will be displayed during the *Review Registration* step since that information is required for registration communications.

8 Registrants In The Same Family

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

9 Enable Wait List

Checking this box will enable the waitlist functionality. You must have a value for the maximum registrants to enable the waitlist. See the chapter on waitlists below.

10 Notify

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

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

11 Add Person Note

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

12 Login Required

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

13 Allow Group Placement

Rock provides tools to help place your registrants into groups for you. This is helpful when creating teams or when working with camps. See the [Registration Group Placements](#) chapter for more information on this tool.

14 Set Cost On

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

15 Cost

The cost of the registration.

16 Minimum Initial Payment

This is the minimum amount that must be paid at the time of registration. Leaving the field blank will have the effect of requiring full payment.

17 Financial Gateway

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

18 Batch Name Prefix

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

19 Registration Workflow

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

20 Allow External Updates to Saved Registrations

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

21 Required Signature Document

Here you can set a digital signature document to be sent out after each registration. The 'In-line Signature' setting determines if the digital signature should occur during the registration process (after filling in each

registrant) or if the request for a digital signature should be sent via email after the registration is complete.

21 Show Communication Settings

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

Digital Signatures

Let's take a moment to point out a really powerful feature that we glossed over a bit. Rock can automate the sending of requests to get digital signatures after each registration. We cover this topic in detail in the [Admin Hero Guide](#).

Forms

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

Form Field List

Form(s) ^

Default Form ^

| Field | Source | Type | Internal | Common | Use Current Value | Required | Show on Grid | Show on Wait List | |
|---------------------|------------------------|------|----------|--------|-------------------|----------|--------------|-------------------|--|
| ≡ First Name | Person Field | | | | | ✓ | ✓ | ✓ | |
| ≡ Last Name | Person Field | | | | | ✓ | ✓ | ✓ | |
| ≡ Birthdate | Person Field | | | | | ✓ | | ✓ | |
| ≡ Gender | Person Field | | | | | ✓ | | ✓ | |
| ≡ Leader Preference | Registration Attribute | Text | | ✓ | | ✓ | | ✓ | |
| ≡ Cabin Preference | Registration Attribute | Text | | ✓ | | ✓ | | ✓ | |

+

+ Add Form

At a minimum you must collect the registrant's first and last name. But in most cases you'll want to add at least a couple more fields.

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

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

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

- **Common Value:** Filling out forms can be tedious. This setting allows you to take the entered value from the first registration and auto-populate the same field for the subsequent registrants.
- **Internal:** This setting allows you to define the attribute, but keep it from being displayed on the external registration form. It will be made available however when editing the form internally. This is used for internal fields that will be entered after the registration takes place, or for simply displaying, for example, an existing person attribute on the grid for event-administration purposes.

- **Use Current Value:** In an effort to reduce the amount of data that must be entered, this setting takes the current value from the registrar's record. This is especially helpful for attributes like 'Address'.
- **Show On Grid:** This will place this attribute on the grid of registrants. It can be very helpful as long as you limit the number of items you put on the grid.
- **Pre-Text / Post-Text:** Like the workflow entry forms, these fields allow you to surround your entry fields with custom HTML markup. With some basic web design knowledge you can use these fields to create richer experiences.

Confirmation Email

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

Confirmation Email Settings

Confirmation Email ^

From Name

{{ RegistrationInstance.ContactPersonAlias.Persc

From Email

{{ RegistrationInstance.ContactEmail }}

Subject

{{ RegistrationInstance.Name }} Confirmation

Email Template

```

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

```

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

Default Confirmation Email



Registration Confirmation: Summer Camp

The following registrants have been registered for Summer Camp 2015:

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

Total Cost: \$630.00
Paid \$630.00 on 8/16/2015 (Ref #: T20150816213234104)
Balance Due: \$0.00

Looking forward to seeing you at camp this year!

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

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

Additional text from the registration instance

Reminder Email

We all appreciate reminders. Especially for events we may have registered for long ago. On this screen you can edit the reminder emails. When you create the registration instance (discussed next), you will configure when this email will be sent.

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

Payment Reminder Email

Allowing partial payments is great, but getting the remaining balance has always been difficult. That was until Rock came around. There's now several tools for getting the remaining balance quickly and easily. The configuration items in this section help setup the communication tools for these reminders. For the most part you can leave them as is. You can read more about these tools in the [□](#) section below.

Reminder Email Settings

Payment Reminder Email

From Name

From Email

Subject

Email Template

```
5 <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Payment Reminder</h1>
6
7 <p>
8   This {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm | Downcase }} for {{
9     RegistrationInstance.Name }} has a remaining balance
10  of {{ currencySymbol }}{{ Registration.BalanceDue | Format:'#,##0.00' }}. The
11  {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | Downcase | Pluralize }} for this
12  {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} are below.
13 </p>
14 {% assign registrants = Registration.Registrants | Where:'OnWaitList', false %}
15 {% assign registrantCount = registrants | Size %}
16 {% if registrantCount > 0 %}
17   <ul>
18     {% for registrant in registrants %}
19       <li>{{ registrant.PersonAlias.Person.FullName }}</li>
20     {% endfor %}
21   </ul>
22 {% endif %}
23
24 {% assign waitlist = Registration.Registrants | Where:'OnWaitList'. true %}
```

Payment Reminder Time Span ?

Terms / Text

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

Terms and Text Settings

Terms/Text ^

Registration Term

Registration

Fee Term

Additional Options

Registrant Term

Registrant

Discount Code Term

Discount Code

Success Title i

Congratulations {{ Registration.FirstName }}

Registration Instructions i

A rich text editor toolbar with various icons for text formatting and editing. The icons include: a code symbol, bold (B), italic (I), strikethrough (ABC), link (chain), text color (A), background color (brush), bulleted list (list), numbered list (list), indent (right arrow), outdent (left arrow), image (picture), link (chain), unlink (chain with slash), redo (curved arrow), and undo (curved arrow).

Registration Confirmation Text i

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

Registration Instances

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

Instance Settings

Clicking the  from the instance grid will bring up the instance editor show below.

Registration Instance Settings

Registration Instance
Home > Summer Camp > Summer Camp

Summer Camp Summer Camp Registration Registrant

Summer Camp

Registration Instance Name 1
Summer Camp

Active 2
 Yes

Registration Starts 3
6/22/2018 12:00 AM

Registration Ends 4
8/31/2018 12:00 AM

Maximum Attendees
200

Registration Workflow 7

Send Reminder Date 8
9/11/2017 9:00 AM

Contact
Jenny Michaels

Contact Phone 6
(602) 555-3245

Contact Email
jenny@rocksolidchurchdemo.com

Account 5
Event Registration

Registration Instructions

Additional Reminder Details 9
Camp starts on September 13. We will be leaving from the church at 7am so please don't be late.
Be sure to read our [What To Bring To Camp](#) guide for details on packing for camp.

Additional Confirmation Details 10
Looking forward to seeing you at camp this year!

Save Cancel

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- 1 **Registration Instance Name**
This is actually an important field that will be shown during the registration process. It will be used to describe the event that you are registering for (e.g. *Thank You for Registering for "_____"*).
- 2 **Active**
This determines if the registration instance is currently active.
- 3 **Registration Starts**

The date and time that the registration starts.

4 Registration Ends

The date and time that the registration ends.

5 Account

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

6 Contact Name / Phone / Email

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

7 Registration Workflow

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

8 Send Reminder Date

The date and time that the reminder should be sent.

9 Additional Reminder Details

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

10 Additional Confirmation Details

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

Setting the Price on the Registration Instance

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

Follow A Registration Instance

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

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

Registration Fees

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

Fee Types

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

Types of Fees

1 Single Option
T-Shirt (\$10.00)

2 Single Option with Quantity
T-shirt (\$10.00)

3 Multiple Options
T-Shirt

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

4 Multiple Options with Quantity
T-shirt
S (\$10.00)

M (\$15.00)

L (\$20.00)

- 1 Single Option Fee**
You either want it or you don't.
- 2 Single Option Fee with Quantity**
You can get as many as you want.
- 3 Multiple Options**
Variety is the spice of life.
- 4 Multiple Options with Quantity**
What's better than a little spice? A whole lot!

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

Setting Up Fees

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

Fee List

| Fee | Options | Cost | Enable Quantity | Discount Applies | Is Active | Is Required | |
|--------------|----------|---------------------------------------------------------------|-----------------|------------------|-----------|-------------|---------------------------------------------------------------------------|
| ☰ Camp Shirt | Multiple | Small-\$10.00, Medium-\$10.00, Large-\$10.00, X-Large-\$10.00 | | | ✓ | | <input type="button" value="edit"/> <input type="button" value="delete"/> |

Click the  button to create a new fee.

Fee Editor

Fee

Name ¹

Options ²

Single Multiple

Cost

\$

Enable Quantity ³ Yes No

Is Required ¹ Yes No

Discount Applies ⁴ Yes No

Is Active ⁵ Yes No

Save Cancel

- 1 Name**
This will be used for the label that goes above the fee selection.
- 2 Options**
Here is where you'll make the determination of whether the fee has multiple options. When selected, it will display a key/value input that allows you to enter optional text as well as the cost.
- 3 Enable Quantity**
Pretty obvious what this does (enables the quantity picker).
- 4 Discount Applies**
Sometimes you'll want the discount calculation to apply to fees sometimes not.
- 5 Is Active**
Check this box to make the fee active. Inactive fees will not be displayed for new registrations, but will be displayed when viewing charges for existing registrations.

Optional vs. Required Fees

Fees can be either optional or required. To designate a fee as required select the *Is Required* checkbox on the *Fee Editor* screen. Required fees are designated by a red dot on the event registration screens. If a registration is submitted with a missing required fee value, Rock will display a message asking the registrant to select a value before proceeding.

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

- **Single Option** - Rock automatically checks the box and disables it to prevent changes.
- **Single Option with Quantity** - Rock sets the minimum quantity to "1" and prevents it from being changed to less.
- **Multiple Options** - Rock creates the same dropdown list as an optional fee, but

displays a message if no value is selected.

- **Multiple Options with Quantity** - Because at least one option must have a value selected, Rock displays a warning if all options have a value of "0".

Required Fees Options

Fee [Close]

Name *
Camp Shirt

Options
 Single Multiple

Costs

| | | |
|---------|-------|-----|
| Small | 10.00 | [X] |
| Medium | 10.00 | [X] |
| Large | 10.00 | [X] |
| X-Large | 10.00 | [X] |

[+]

Enable Quantity ⓘ Yes

Is Required ⓘ Yes

Discount Applies ⓘ Yes

Is Active ⓘ Yes

[Save] [Cancel]

Fee Reports

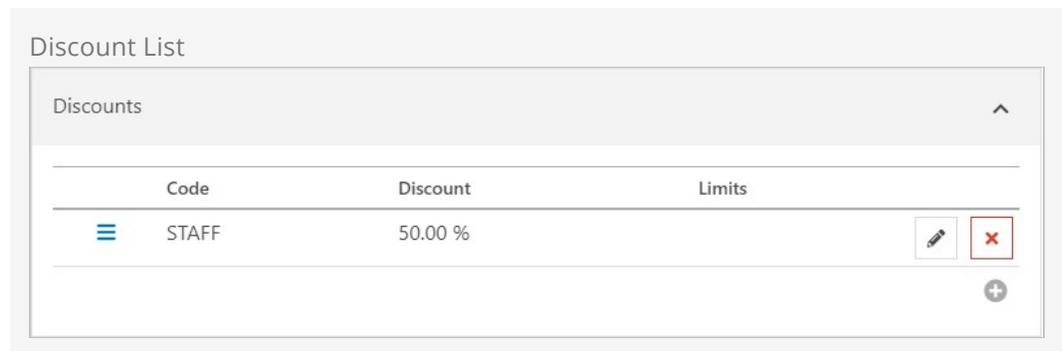
All of the fees for each registration are listed under the *Fees* tab on the *Registration Instance* screen. You can use the filter options to filter the information by date range, fee name, and/or one or more of the options that apply to that fee. (Note: because the options vary with each fee, the available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

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

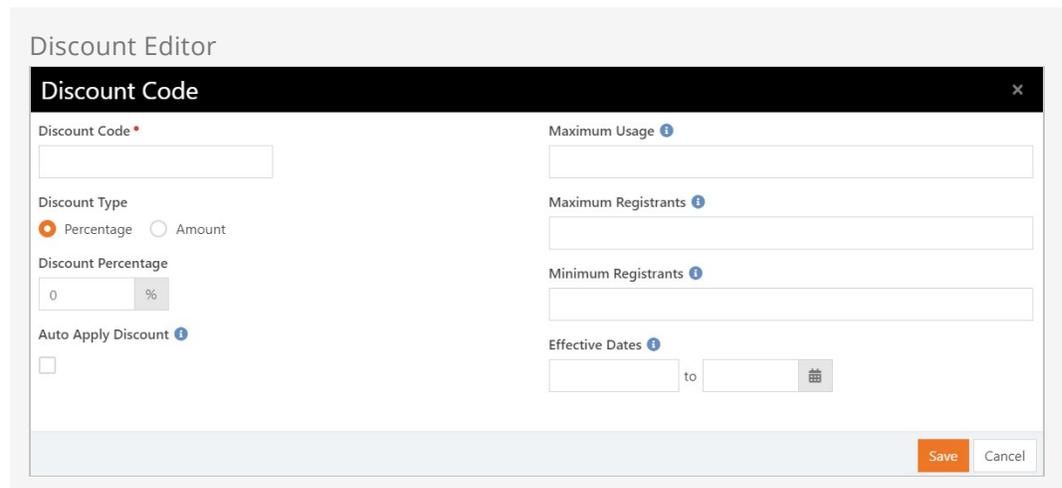
Discounts

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

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



Click the  button to create a new discount.



All of the discount options are available in the *Discount Code* screen. From here you can

create whatever combination of criteria you want for each discount. Keep in mind that only one discount can be applied to each registration instance.

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

Discount Codes

Discount codes allow you to give individuals a code to reduce the amount of their registration. This discount can be in the form of a percentage of costs/fees or a fixed amount. To create a discount code, enter a percentage or amount in the *Discount Type* and *Discount Percentage* fields of the *Discount Code* screen.

Quantity Discounts

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

Early Bird Discounts

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

Customized Discounts

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

Automatic Discounts

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

Maximum Usage

You can limit the number of times a discount code can be used by entering a value in the *Maximum Usage* field. Leave this field blank if you want the discount code to be available for use indefinitely.

Viewing and Reporting Used Discounts

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

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

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

Managing Event Registrations

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

Promoting Your Registration

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

Event Detail Page With Registration Link

Rock Solid Church New Here? Resources Connect Give Blog Calendar Upcoming Events Hello Alisha ▾

Event Details

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

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

Location
Camp Humphreys - Flagstaff, AZ

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

[Register](#)



Summer Camp 2015

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

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

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

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

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

Managing Registrations

You can manage the registrations by going to the *Event Instance Detail Page* ([Tools](#) > [Event Registration](#) > [Registration Detail](#) > [Registration Instance](#)). At the top of this page you'll see the details of the registration with an [Edit](#) button to modify its settings. You'll also notice a number of tabs toward the bottom of the page, each relating to a different component of the registration process (registrations, payments, etc.). The content on each of the tabs can be filtered using the *Filter Options* link.

Registrations Tab

The *Registrations Tab* shows all of the registrations that have been entered into the system. Remember these are registrations that could have multiple registrants.

The screenshot displays the 'Registration Instance Detail Page' for a 'Summer Camp' event. The page features a navigation sidebar on the left with icons for home, list, user, settings, and tools. The main content area includes a breadcrumb trail: Home > Summer Camp > Summer Camp. Below this is a progress indicator with four steps: Summer Camp, Summer Camp (active), Registration, and Registrant. The 'Summer Camp' details section shows the following information:

- Name: Summer Camp
- Account: Event Registration
- Maximum Attendees: 200
- Registration Starts: 6/22/2018
- Registration Ends: 8/31/2018

Buttons for 'Edit', 'Delete', and 'Send Payment Reminders' are visible. Below the details is a tabbed interface with 'Registrations' selected. The 'Registrations' section includes a 'Filter Options' dropdown and a table of registration records:

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

At the bottom of the table, there are pagination controls showing '50', '500', '5,000' and '1 Registration'. The footer of the page reads 'Crafted by the Spark Development Network / License'.

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

Registration Edit Screen

Registration
Home > Summer Camp > Summer Camp > Registration

Summer Camp Summer Camp **Ted Decker** Registrant

Registration Details 1 \$100.00 \$100.00

Registered By: Ted Decker
Confirmation Email: alisha.marble@rocksolidchurchdemo.com
Resend Confirmation

Discount Code: STAFF
Discount Percentage: 50 %

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

Total Cost: \$100.00
Paid: \$0.00
Amount Remaining: \$100.00

3 View/Edit Payments

4 Audit Log

5

Edit Delete

Alex Decker \$100.00

2 Birthdate: 2/28/2008
Gender: Female
Leader Preference: Alisha Marble
Cabin Preference: Bears
Count: One
CountDown: Ten

Cost: \$200.00
Discounted Cost: \$100.00
Camp Shirt: \$0.00

Edit Delete

6 + Add New Registrant

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1 Registration Details

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

2 Registrant Details

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

3 **View Edit Payments**

This link allows you to view and edit payments. We'll discuss this further below.

4 **Audit Log**

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

5 **Move Registration**

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

6 **Add New Registrant**

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

Registrants Tab

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

Registration Instance Registrants

Search

Registration Instance

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

Summer Camp
 Summer Camp
 Registration
 Registrant

Summer Camp
Summer Camp

| | |
|-----------------------------------------|---------------------------------------|
| Name Summer Camp | Account Event Registration |
| Maximum Attendees 200 | |
| Registration Starts 6/22/2018 | Registration Ends 8/31/2018 |

[Edit](#) [Delete](#)
[Send Payment Reminders](#)

Registrations
Registrants
Payments
Fees
Discounts
Linkages

Registrants
Filter Options

| <input type="checkbox"/> Registrant | Group | Fees |
|---------------------------------------|-------|-----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Decker, Alex | | Camp Shirt (\$0.00) X |

1 Registrant

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Payments Tab

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

Registration Payments

The screenshot displays the 'Registration Payments' interface. At the top, there is a navigation bar with a search icon and a user profile icon. Below this is a breadcrumb trail: 'Home > Summer Camp > Summer Camp'. The main content area is divided into several sections:

- Registration Instance:** A header section with a breadcrumb trail and a navigation bar containing 'Summer Camp', 'Summer Camp', 'Registration', and 'Registrant'. The 'Summer Camp' tab is active.
- Summer Camp Details:** A card showing details for the 'Summer Camp' instance. It includes fields for Name (Summer Camp), Account (Event Registration), Maximum Attendees (200), Registration Starts (6/22/2018), and Registration Ends (8/31/2018). There are 'Edit' and 'Delete' buttons, and a 'Send Payment Reminders' link.
- Payments Tab:** A tabbed interface with 'Payments' selected. It shows a table of payments with columns: Person, Date / Time, Amount, Payment Method, Account, Transaction Code, Registrar, and Registrant(s). A single payment is listed for Ted Decker on 6/13/2018 for \$100.00 via Credit Card. Below the table is a filter range from 50 to 5,000 with 1 Payment.

At the bottom of the interface, it says 'Crafted by the Spark Development Network / License'.

Fees Tab

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

Registration Instance Registrants

Search
▼

-
-
-
-
-
-

Registration Instance

Home > Summer Camp > Summer Camp

Summer Camp
Summer Camp
Registration
Registrant

Summer Camp
Summer Camp
☆

Name
Summer Camp

Maximum Attendees
200

Registration Starts
6/22/2018

Account
Event Registration

Registration Ends
8/31/2018

Edit
Delete
Send Payment Reminders

Registrations
Registrants
Payments
Fees
Discounts
Linkages

Fees

Filter Options ▼

| Registration Date | Registered By | Registrant | Fee Name | Option | Quantity | Cost | Fee Total |
|-------------------|---------------|---------------|------------|--------|----------|--------|-----------|
| 6/13/2018 | Ted Decker | Alexis Decker | Camp Shirt | | 1 | \$0.00 | \$0.00 |

50 500 5,000 1 Fee

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Discounts Tab

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

Registration Instance Registrants

Search
Search

Registration Instance

Home > Summer Camp > Summer Camp

Summer Camp
Summer Camp
 Registration
 Registrant

Summer Camp
Summer Camp

| | |
|-----------------------------------------|---------------------------------------|
| Name Summer Camp | Account Event Registration |
| Maximum Attendees 200 | |
| Registration Starts 6/22/2018 | Registration Ends 8/31/2018 |

[Edit](#)
[Delete](#)
[Send Payment Reminders](#)

[Registrations](#)
[Registrants](#)
[Payments](#)
[Fees](#)
[Discounts](#)
Linkages

Linkages

Filter Options

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

50
500
5,000
1 Linkage

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Wait List Tab

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

Registration Instance Registrants

Search

-
-
-
-
-
-

Registration Instance

Home > Event Registration > Summer Camp

Summer Camp
Summer Camp
Registration
Registrant

Summer Camp
Summer Camp

| | |
|-----------------------------------------|---------------------------------------|
| Name Summer Camp | Account Event Registration |
| Maximum Attendees 200 | |
| Registration Starts 6/22/2018 | Registration Ends 8/31/2018 |

Edit Delete
Send Payment Reminders

Registrations
Registrants
Payments
Fees
Discounts
Linkages
Wait List
Group Placement

Wait List

Filter Options Wait List

| <input type="checkbox"/> | Wait List Order | Wait List Individual | Added Datetime |
|--------------------------|-----------------|----------------------|----------------------|
| <input type="checkbox"/> | 1 | Decker, Noah | 6/13/2018 9:46:41 PM |

1 Wait List Individual

Move From Wait List

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Group Placement Tab

If the *Allow Group Placement* option is selected in your registration template, you'll also see a Group Placement tab. This is where you can place registrants into groups. See the Registration Group Placements section to learn more.

Home > Summer Camp > Summer Camp

Summer Camp Summer Camp Registration Registrant

Summer Camp

Name: Summer Camp Account: Event Registration

Maximum Attendees: 200

Registration Starts: 6/22/2018 Registration Ends: 8/31/2018

Edit Delete Send Payment Reminders

Registrations Registrants Payments Fees Discounts Linkages **Group Placement**

Group Placement

Filter Options: Summer Camp Set Group Member Attributes: Yes

| Registrant | Group |
|--------------|-------------------------------------------------------------------------------------------------|
| Decker, Alex | <ul style="list-style-type: none">Cindy Decker's GroupTed Decker's Group |

Place

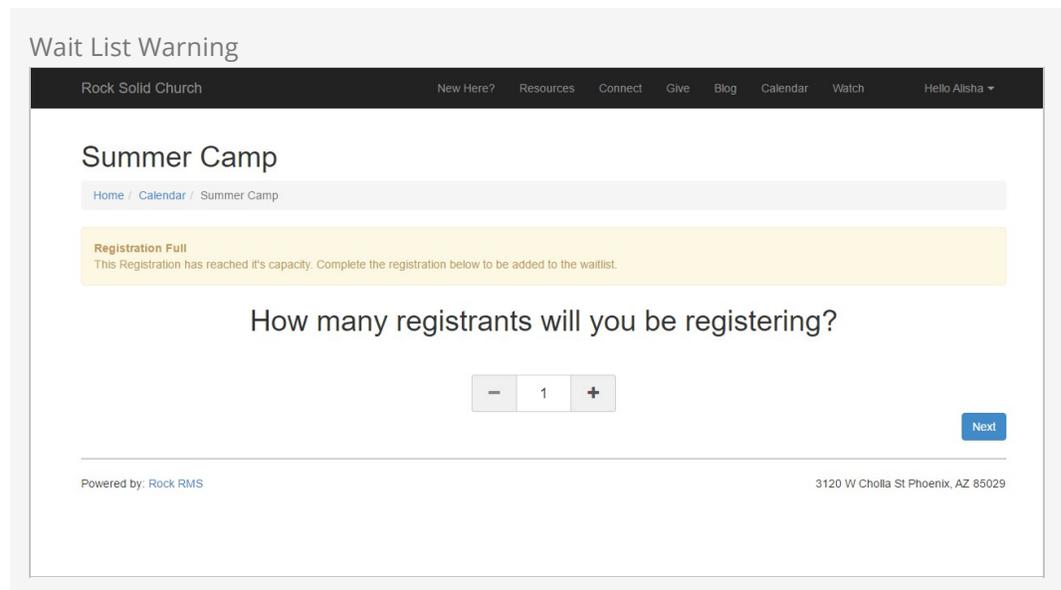
Select Cancel Show Inactive

Wait Lists

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

Registration Entry

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



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

Wait List Warning (Partial)

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

Summer Camp

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

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

How many registrants will you be registering?

- +

[Next](#)

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

Registrant Screen

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

Summer Camp

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

First Registrant

This registrant will be fully registered.

First Name *

Last Name *

Birthday *
 / /

Gender *

Leader Preference *

Cabin Preference *

Food Allergies

Additional Options

Camp Shirt

Previous [Next](#)

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

Group Member Entry Fields

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

The screenshot shows a web interface for a church's registration system. At the top, there is a navigation bar for "Rock Solid Church" with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and a user greeting "Hello Alisha". The main content area is titled "Wait List Screen" and "Summer Camp". Below this, there is a breadcrumb trail: "Home / Calendar / Summer Camp". The main heading is "Second Registrant". A yellow banner states "This registrant will be on the waiting list". Below this is a blue progress bar. A section titled "Individual is in the same family as *" contains two radio button options: "Jen Fish" (unselected) and "None of the above" (selected). Below this are form fields for "First Name" (Lynn), "Last Name" (Sykes), "Birthday" (Jun / 18 / 2000), and "Gender" (Female). At the bottom of the form are "Previous" and "Next" buttons. The footer includes "Powered by: Rock RMS" and the address "3120 W Cholla St Phoenix, AZ 85029".

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

Summer Camp

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

Review Registration

This Registration Was Completed By

| | |
|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| First Name * <input type="text" value="Alisha"/> | Last Name * <input type="text" value="Marble"/> |
| Send Confirmation Emails To * <input type="text" value="alish@rocksolidchurchdemo.com"/> | Alisha is in the same family as * <input type="radio"/> Jen Fish <input type="radio"/> Lynn Sykes <input checked="" type="radio"/> None |
| <input checked="" type="checkbox"/> Should Your Account Be Updated To Use This Email Address? | |

Payment Summary

Discount Code

| Description | Amount |
|-----------------------------|------------------|
| Jen Fish | \$ 200.00 |
| Lynn Sykes (Waiting List) * | \$ 0.00 |
| Total | \$ 200.00 |

Total Cost
\$200.00

Minimum Due Today
\$100.00

Amount To Pay Today *
\$ 200.00

Amount Remaining
\$0.00

Payment Method

Credit Card #

Expiration Date / **Card Security Code**

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

Wait List Confirmation Screen

Summer Camp

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

Congratulations Alisha

You have successfully registered the following registrant for Summer Camp:

- **Jen Fish** - \$200.00

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

- **Lynn Sykes**

Total Cost: \$200.00

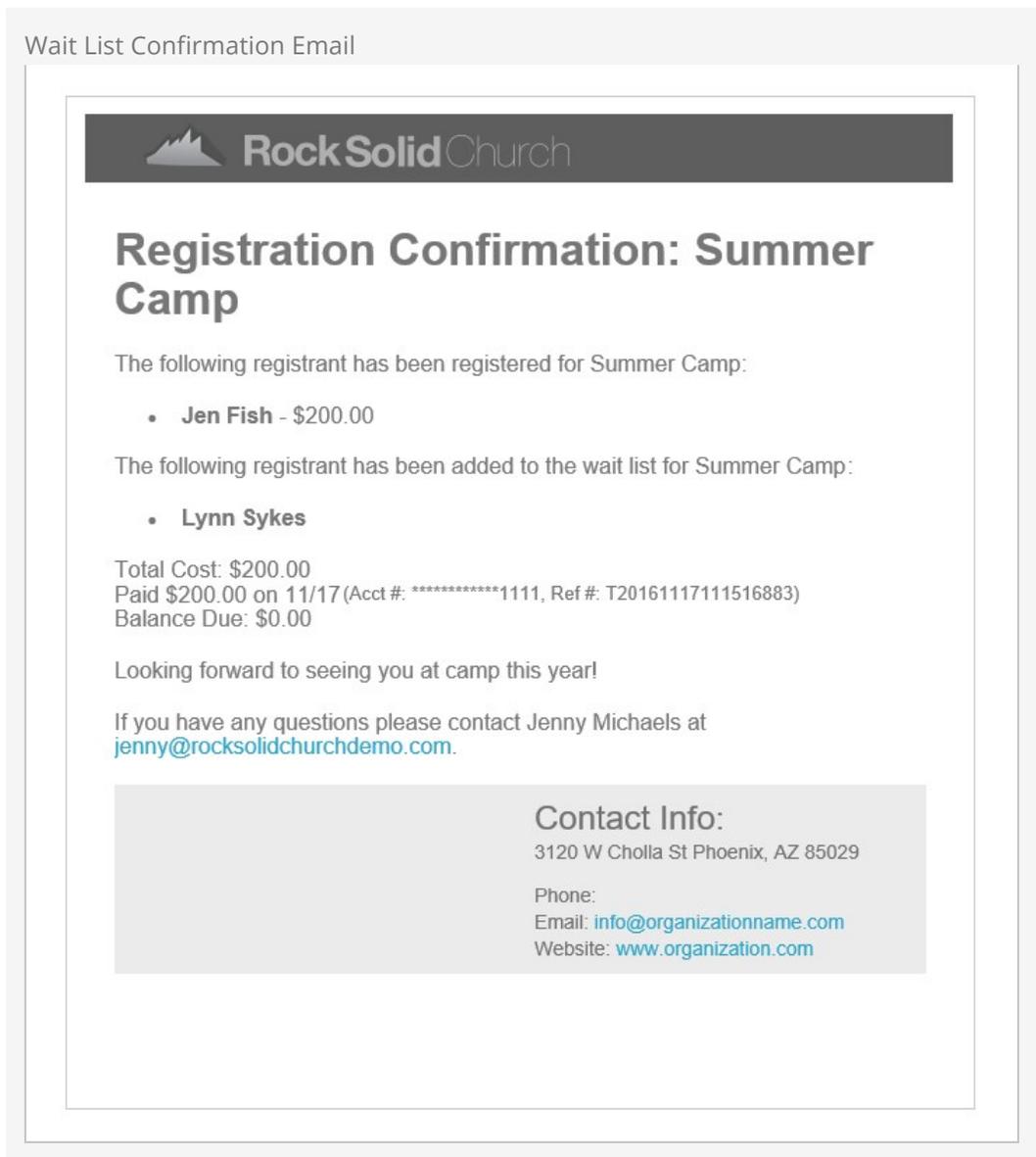
Paid \$200.00 on 11/17 (Acct#: *****1111, Ref#: T20161117111516883)

Balance Due: \$0.00

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

Make Payments Even Easier

Save account information for future transactions



Wait List Administration

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

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

Registration List

Search

Registration Instance

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

Summer Camp
Summer Camp
Registration
Registrant

Summer Camp Summer Camp ☆

Name
Summer Camp

Account
Event Registration

Maximum Attendees
200

Registration Starts
6/22/2018

Registration Ends
8/31/2018

[Send Payment Reminders](#)

Registrations
Registrants
Payments
Fees
Discounts
Linkages
Wait List
Group Placement

Registrations

Filter Options 🗨️ 👤 🚚 📅 📄 +

| <input type="checkbox"/> | Registered By | Registrants | When | Total Cost | Balance Due | |
|--------------------------|----------------|----------------------------------------------------------------------------------------------------------------------------------|-------------------|------------|-------------|---|
| <input type="checkbox"/> | Marble, Alisha | | 6/13/2018 9:44 PM | \$0.00 | \$0.00 | ✕ |
| <input type="checkbox"/> | Decker, Ted | Alex Decker Noah Decker wl ⚙️ | 6/13/2018 9:03 PM | \$100.00 | \$0.00 | ✕ |

2 Registrations

🗨️ 👤 🚚 📅 📄 +

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

Wait List Tab

Registration Instance
Home > Event Registration > Summer Camp

Summer Camp Summer Camp Registration Registrant

Summer Camp

Name: Summer Camp Account: Event Registration

Maximum Attendees: 200

Registration Starts: 6/22/2018 Registration Ends: 8/31/2018

Edit Delete Send Payment Reminders

Registrations Registrants Payments Fees Discounts Linkages **Wait List** Group Placement

Wait List

Filter Options List

| <input type="checkbox"/> | Wait List Order | Wait List Individual | Added Datetime |
|--------------------------|-----------------|----------------------|----------------------|
| <input type="checkbox"/> | 1 | Decker, Noah | 6/13/2018 9:46:41 PM |

50 500 5,000 1 Wait List Individual

Move From Wait List

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After you select to move them you'll see the screen below confirming that they have been moved. At this point the new full registrant will be added to any groups that were configured. If you'd like to send them an email to confirm the move and request additional fields simply select the *Send email to individuals* checkbox.

The email that is sent will remind them if any payment is due and also ask them to complete the registration if any additional fields are needed.

Wait List Move Confirmation

Wait List
Home > Event Registration > Summer Camp > Wait List

Wait List Confirmation

Wait List Updated 1 individual was moved from the wait list.

Send email to individuals

Wait List Move Email

Wait List
Home > Event Registration > Summer Camp > Wait List

Wait List Confirmation

Wait List Updated 1 individual was moved from the wait list.

Send email to individuals

Recipients

Ted Decker
(alisha.marble@rocksolidchurchdemo.com)
Registrants: Noah Decker

From Name *

Jenny Michaels

From Email *

jenny@rocksolidchurchdemo.com

Subject *

Summer Camp Wait List Update

Message Source Preview

ROCK

Summer Camp Wait List Update

Ted, the following individuals have been moved from the Summer Camp wait list to a full registrant.

- Noah Decker

Addition information is needed in order to process this registration. Please visit the [online registration page](#) to complete the registration.

A balance of \$100.00 remains on this registration. You can complete the payment for this registration using our [online registration page](#).

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

Send

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While this feature makes moving people from the wait list a simple process, you can

also convert a full registrant to a wait list member or a wait list member to a full registrant from the registration details screen.

Registration Payment Reminders

Allowing partial payments is great, but getting the remaining balance has always been difficult. That was until Rock came around. Now there are several tools for getting the remaining balance quickly and easily.

Rock provides several tools to allow you to easily receive the amount owed. Let's look at all your options!

Manual Reminders

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

Registration Instance
Home > Event Registration > Summer Camp

Summer Camp Summer Camp Registration Registrant

Summer Camp Summer Camp

Name: Summer Camp Account: Event Registration
Maximum Attendees: 200
Registration Starts: 6/22/2018 Registration Ends: 8/31/2018

Edit Delete Send Payment Reminders

Registrations Registrants Payments Fees Discounts Linkages Wait List Group Placement

Registrations

Filter Options

| Registered By | Registrants | When | Total Cost | Balance Due |
|--------------------------|-------------------------------------------|-------------------|------------|-------------|
| <input type="checkbox"/> | Marble, Alisha | 6/13/2018 9:44 PM | \$0.00 | \$0.00 |
| <input type="checkbox"/> | Decker, Ted Alex Decker Noah Decker | 6/13/2018 9:03 PM | \$300.00 | \$100.00 |

50 500 5,000 2 Registrations

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

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

Send Payment Reminders

1 From Name *
Jenny Michaels

From Email *
jenny@rocksolidchurchdemo.com

Subject *
Summer Camp Payment Reminder

3 Source Preview

2 Message

Registration Payment Reminder

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

- Alex Decker
- Noah Decker

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

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

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

Outstanding Balances

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

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

4 Send Reminders 5

Crafted by the Spark Development Network / License

- 1 The "from" name and email as well as the subject should be filled in for you based on the values supplied from the registration template. You can edit these values to suit your needs.
- 2 Next you see a preview of the email the individuals will receive. The preview uses the information for the first person on the grid below to give you a precise view of what the person will receive in their inbox.
- 3 You can choose to edit the email template if you wish by clicking the `Source` toggle. This will display the Lava template that creates this email.
- 4 Below the preview you'll see a list of those with a remaining balance. When creating the list, Rock looks at the *Payment Reminder Time Span* setting for the registration template. If the registration has already received a reminder or was created within this timespan, the registration is greyed out and is not selected (the checkbox is checked). You can, however, override this and select specific registrations or all registrations.
- 5 Click the `Send Reminders` button and you're off to the races!

Automatic Reminders

Manual reminders are nice, but automatic ones...well they're even better! If you provide a *Payment Reminder Time Span* on the registration template, Rock will send an automatic reminder to the registrations based on that timeframe. So for example, if you provide the value of 30 for the *Payment Reminder Time Span*, they will receive a reminder every 30 days until their balance is paid.

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

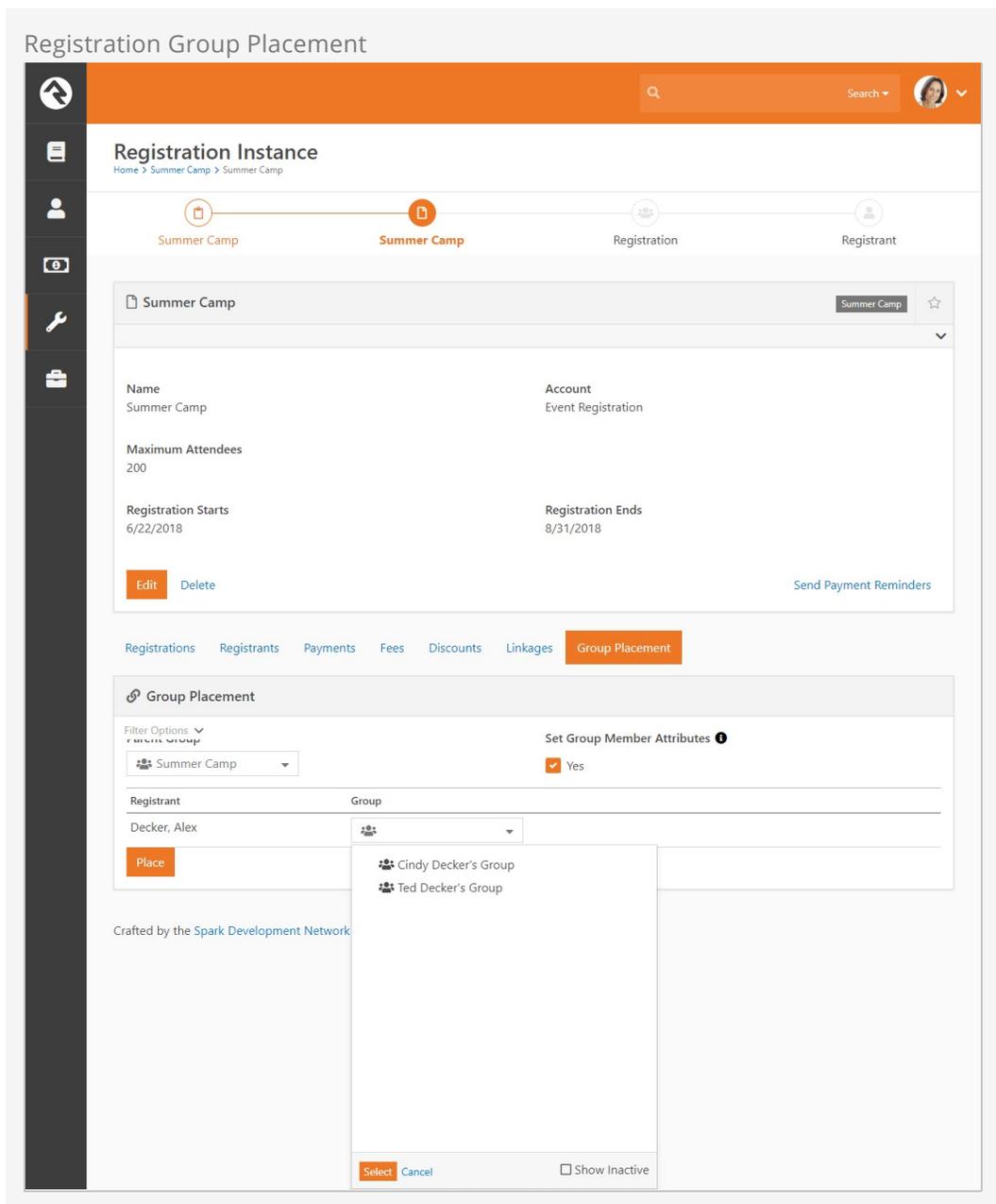
Registration Group Placements

Sometimes a registration isn't over once all the information is collected. In fact sometimes that's just the beginning. That's certainly the case with events like sports teams and camps. After all the registrations are in you still need to form teams and camp groups. That's where Rock's registration placement features kick in. They allow you to easily add registrants to group hierarchies.

In order for these tools to kick in, you need to first enable them on your registration template. The setting is labeled *Allow Group Placement* on the *Details* tab of the template. Once that's enabled, you're off to the races.

Placement

Once the placement feature is enabled, you will see an extra tab under your registration instance. From this tab you can quickly place the registrants into groups of your choosing. Let's see how this works.



The first thing you'll notice is the parent group drop-down. This setting allows you to pick a group that will become the top level or container group for all of the placement groups. When you select a parent group, you may notice that some of the registrants disappear. Don't worry, this just indicates that that registrant is already in a child group under the parent. Hiding them allows you to focus solely on the registrants who have not yet been placed. If you'd like to change a registrant's placement group, simply remove them from the group and they'll re-appear.

After selecting the parent group it's time to select the placement group for each child. Note that the registrant list shows all the attributes that are selected as *Show On Grid*. During the placement process you may wish to adjust which attributes are shown.

Note the *Set Group Member Attributes* checkbox above the registrant list. This option allows you to copy registrant attribute values to the group member attribute values if both have the same key. For example, say your summer camp registration has a

registrant attribute value for shirt size, and that attribute's key is "shirtsizes". If your cabin groups also have a shirt size attribute with the key "shirtsizes", when you process group placements with the *Set Group Member Attributes* option checked, the shirt size values of the registrants will be copied over to the groups they are placed in.

Once you have selected the placement groups, select to add the individuals to the groups.

You Can Place In More Than One Group

Let's say for your camp registration you'd like to place a child in a cabin group and a bus group. No problem! Just ensure that the bus and cabin groups are under separate parents. You can then run the placement twice.

Registration Finances

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

Adding Payments

While most of the time payments for events will be handled by the registrar during the registration process, you can manually enter payments on their behalf from the registration details page [Tools > Event Registration > Registration Template > Registration Instance > Registration](#) (ok... that seems complex, but it's really not as bad as it look on paper...)

From the *Registration Details* page you can manage payments using the *View/Edit Payments Link* (highlighted below).

Registration
Home > Event Registration > Summer Camp > Registration

Summer Camp Summer Camp **Ted Decker** Registrant

Registration Details \$200.00 \$100.00

Registered By: Ted Decker
Confirmation Email: alisha.marble@rocksolidchurchdemo.com
Discount Code: STAFF
Discount Percentage: 50 %

[Resend Confirmation](#)

| Description | Amount | Discounted Amount |
|-------------------------|------------------|-------------------|
| Alex Decker | \$ 200.00 | \$ 100.00 |
| Camp Shirt (1 @ \$0.00) | \$ 0.00 | \$ 0.00 |
| Noah Decker | \$ 200.00 | \$ 100.00 |
| Camp Shirt (1 @ \$0.00) | \$ 0.00 | \$ 0.00 |
| Total | \$ 400.00 | \$ 200.00 |

Total Cost \$200.00
Paid \$100.00
Amount Remaining \$100.00

[View/Edit Payments](#)

[Edit](#) [Delete](#) [Audit Log](#)

Alex Decker \$100.00

| Birthdate | Cost | Discounted Cost |
|-----------|----------|-----------------|
| 2/28/2008 | \$200.00 | \$100.00 |

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

Payments Edit Panel

Registration Details \$200.00 \$100.00

| | |
|-------------------------------------------------------------|-----------------------------|
| Registered By Ted Decker | Discount Code STAFF |
| Confirmation Email alisha.marble@rocksolidchurchdemo.com | Discount Percentage 50 % |

[Resend Confirmation](#)

Payments

| Date / Time | Details | Amount |
|----------------------------------------|----------------------------------------------|-------------------|
| 1 6/13/2018 9:18 PM | Decker, Theodore Credit Card *****4444 | \$100.00 |
| 2 | T20180613211193 | 3 |

[Process New Payment](#) [Add Manual Payment](#) [Cancel](#) [4](#)

[Edit](#) [Delete](#) [Audit Log](#) [🔗](#)

- 1 Payment Detail**
Clicking on the date of the payment will take you to the financial transaction detail page for the payment. From here you can get more information about the payment and process a full or partial refund.
- 2 Process A New Payment**
Selecting this option allows you to run a new payment through Rock.
- 3 Add Manual Payment**
This optional allows you to enter the details of a manual (off-line) payment.
- 4 Cancel**
To go back to the view mode simply select the cancel button.

Refunds

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

Transaction Detail
Home > Transactions > Transaction Detail

Financial Transaction Batch #1482 Event Registration

Authorized Person Information

| | |
|------------|-------------|
| Person | Campus |
| Ted Decker | Main Campus |

Addresses

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Date/Time
6/13/2018 9:18 PM

Batch
[SummerCamps_Credit Card](#)

Source
On-Site Collection

Transaction Code
T20180613211812193

Payment Gateway
TestGateway

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

Registration
Summer Camp - Summer Camp

Updates
Created by [Alisha Admin](#) on 6/13/2018 at 9:18 PM
Last Modified by [Alisha Admin](#) on 6/13/2018 at 9:18 PM

[Edit](#) Refund

Transaction History Date Created: 6/13/2018

Filter Options Grid Print

| Category | Who | Did | What | When |
|-------------|------------------------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|----------------|
| Transaction | Alisha Admin | Added Event Registration [4] value of \$100.00. | <a href="/page/166?batchId=2739&transactionId= > | 56 Minutes Ago |

Clicking the [Refund](#) button will show the refund modal below.

Payments Edit Panel

Refund

Amount * 1

Reason * 2

Summary 3

4 Process refund through financial gateway

[Save](#) [Cancel](#)

- 1 Amount**

This tells Rock how much the refund should be for. By default the full amount of the financial transaction is entered into the box.
- 2 Refund Reason**

This dropdown allows you to pick from a standard set of refund reasons. You can modify this list under [Admin Tools > General Settings > Defined Types > Refund Reasons](#)
- 3 Summary**

This field allows you to enter specific notes about the refund.
- 4 Process Refund Through Gateway**

This checkbox determines if the refund should be automatically run through the payment gateway or just entered into Rock (unchecked).

Partial Payments

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

Reminder Emails

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

Recent Registration Block

Rock also ships with a *Recent Registration* block on the *My Account* page of the external website. This block lists any recent registrations and notes if a payment is due. Clicking the link will take them to a page where they can complete the payment.

My Account

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



Ted Decker

ted@rocksoliddemochurch.com
Male
38 yrs old (2/10)

(623) 555-3322 Home
(623) 555-3322 Mobile
(623) 555-2444 Work

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

[Edit](#)

Account Info

[Change Password](#)

Groups

[Ushers \(Member \)](#)

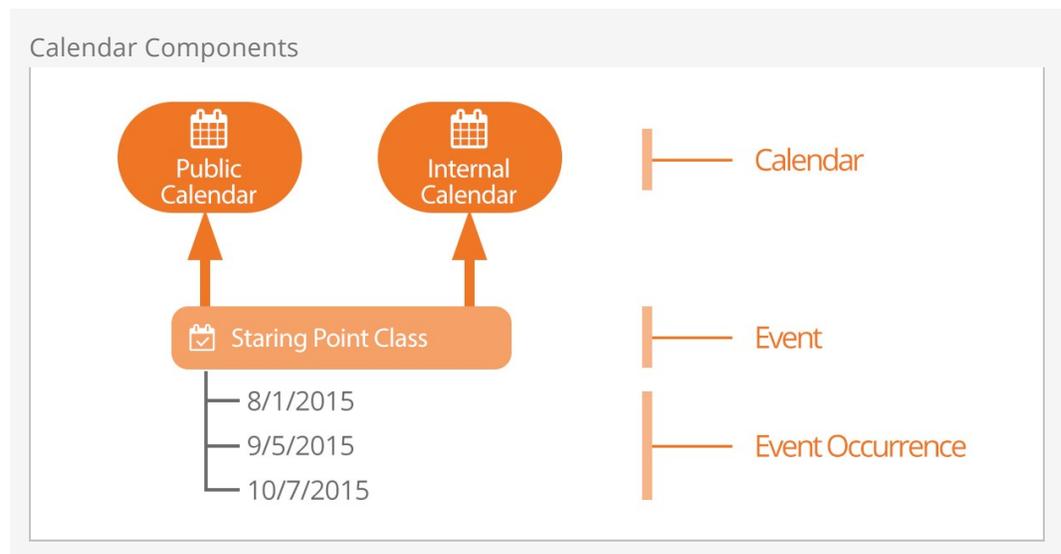
[Decker Group \(Leader*\)](#)

Recent Registrations

[Summer Camp 2016](#)

Calendars

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



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

Event Calendars

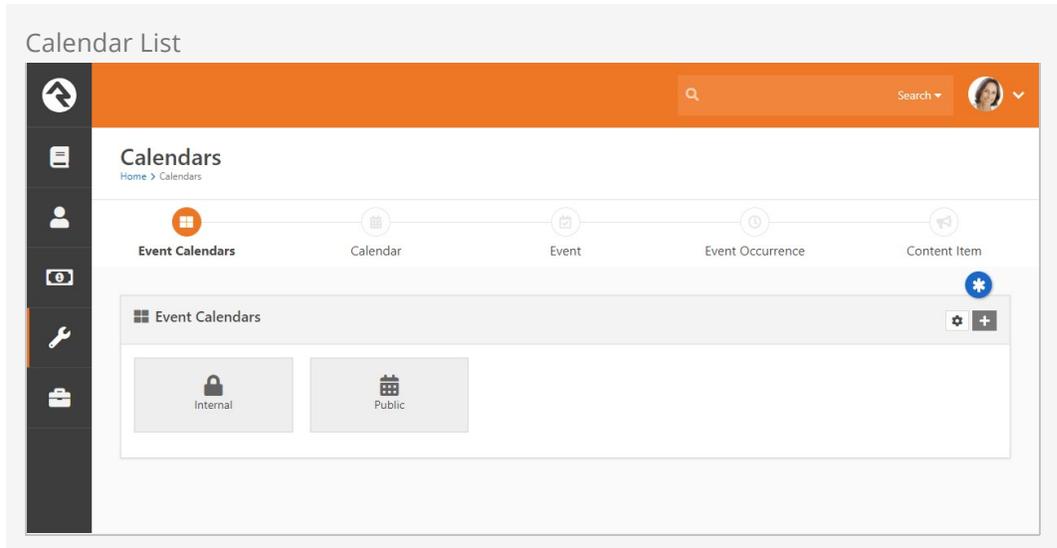
Every organization has the need for multiple calendars. Even a small organization will have a public and private (internal) calendar. Most will have several more. You can administrate calendars under [Tools > Calendars](#).

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

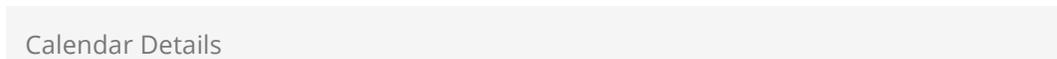
- **Internal:** Used for internal events like staff meetings retreats, etc.
- **Public:** For events targeted towards your members and attendees.

Events Can Be Placed On More Than One Calendar:

Sometimes you'll have an event that should be displayed on more than one calendar. Rock supports this. An event can be on any number of calendars you'd like.



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



Event Calendar
Home > Calendars > Public

Event Calendars **Public** Event Event Occurrence Content Item

Public [Export Calendar Feed](#)

1 Name: Public **2** Active:

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

4 Calendar CSS Class: fa fa-calendar

5 Event Attributes

| Attribute | Description | Field Type | Required | Show in Grid | Allow Search |
|----------------|----------------------------------|------------|----------|--------------|--------------|
| Twitter Photo | Recommended size 440px x 220px. | Image | | | |
| Facebook Photo | Recommended Size 1200px x 630px. | Image | | | |

6 Content Channels

- External Website Ads
- Service Bulletin

[Save](#) [Cancel](#)

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- 1 Name**
The name of the calendar.
- 2 Active**
Whether the calendar is currently active.
- 3 Description**
A quick reminder of what the calendar is for and how it should be used.
- 4 Icon CSS Class**
The Font Awesome icon class the calendar should use.
- 5 Event Attributes**
Each calendar can define custom attributes available to the events that are on them. This is where you define these attributes.
- 6 Content Channels**

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

Calendar Security

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

Events

Once you've created your calendar, you're ready to place events on them. The *Calendar Details Page* ([Tools](#) > [Calendars](#) > [Calendar](#)) shows a list of the current events for a calendar. As you get more and more events you'll want to start using the filters on this grid to help you manage the events that are displayed.

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

Calendar Details

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

Event Calendars Public Rock Solid Finances Class Event Occurrence Content Item

Rock Solid Finances Class Active Approved ☆

Name ¹
 Rock Solid Finances Class

Active ²

Approved ³
 Approved at 9:36 AM on 6/26/2015 by Alisha Admin.

Summary ⁴

Description ⁵

Audiences ⁶

- All Church
- Men
- Women
- Adults

Photo ⁷

Calendars ⁸

- Internal
- Public

Details URL ⁹

Attribute Values ¹⁰

Public

Twitter Photo ¹

Facebook Photo ¹

Save Cancel

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1 Name
 The name of the event.

2 Active

Whether the event is currently active.

2 Approved

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

4 Summary

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

5 Description

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

6 Audiences

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

7 Photo

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

8 Additional Calendars

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

9 Details URL

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

10 Attribute Values

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

Follow An Event

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

Event Occurrences

We have our calendar and now, events. All that's left is to add the event occurrences that determine when these events occur. Some events may only occur once, while others apply often. Either way, you'll add the occurrences from the *Event Details Page*.

Event Instance Edit

- 1 Campus**

First we must select which campus this event will occur on (single campus organizations can select either all or the main campus).
- 2 Contact Information**

Next we select who the contact will be and provide their email and phone number.
- 3 Location Description**

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

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

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

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

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

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

Event Instance Detail

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

Event Calendars | Public | Rock Solid Finances Class | **All Campuses** | Content Item

Event Occurrence

Campus: All
Contact: Alisha Admin
Schedule: Once at 1/29/2016 12:47 AM
Email: admin@organization.com

[Edit](#) [Delete](#)

Content Channels

External Website Ads

| Title | Start | Expire | Priority | Status |
|----------------|-------|--------|----------|--------|
| No Items Found | | | | |

Service Bulletin

| Title | Active | Priority | Status |
|----------------|--------|----------|--------|
| No Items Found | | | |

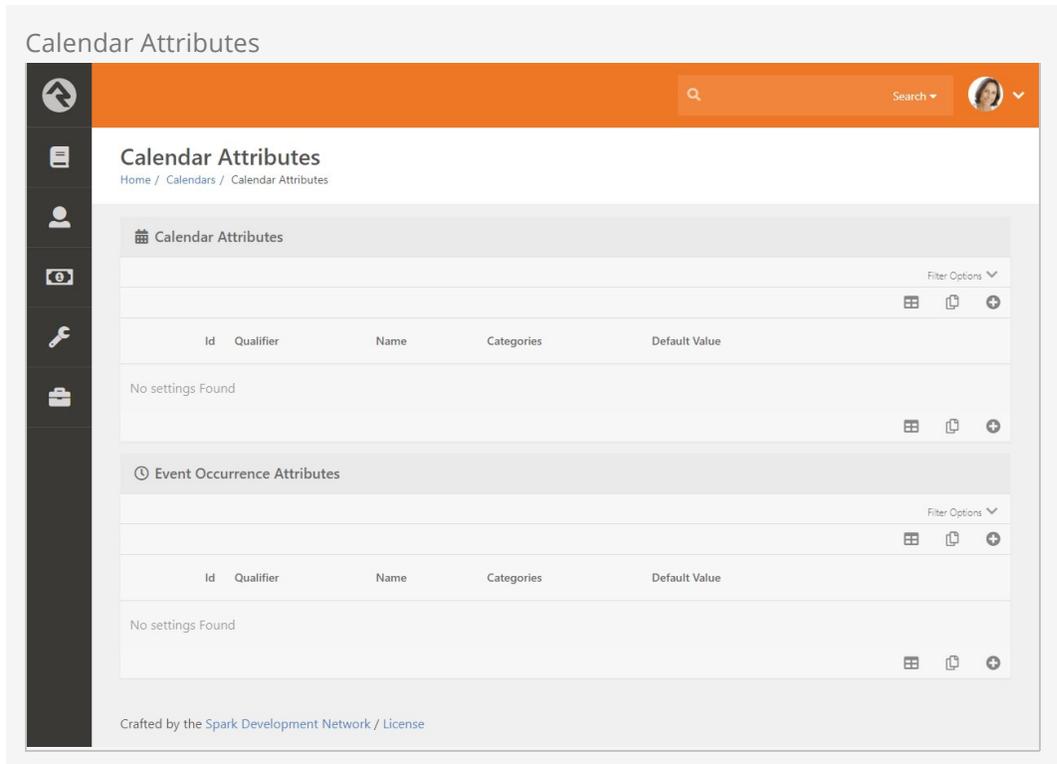
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Event Occurrence Attributes

You can create specific attributes to assign to event occurrences. For example, you

could create a "Lunch Provided?" attribute to use with recurring staff meetings. Then for each meeting assign that attribute a value of "Yes" or "No". As with all attributes, the possibilities are endless and completely customizable for your organization's needs.

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



Calendar Attributes

Home / Calendars / Calendar Attributes

Calendar Attributes

| Id | Qualifier | Name | Categories | Default Value |
|-------------------|-----------|------|------------|---------------|
| No settings Found | | | | |

Event Occurrence Attributes

| Id | Qualifier | Name | Categories | Default Value |
|-------------------|-----------|------|------------|---------------|
| No settings Found | | | | |

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

Calendar Blocks

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

Calendar Block

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

Calendar

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

< **October 2015** >

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

Week Month

Rock Solid Finances Class View Details >

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

Warrior Youth Event View Details >

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

Customs & Classics Car Show View Details >

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

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

Event Detail Block

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

Event Details

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

Contact
admin@organization.com

Date / Time
Wednesday, October 28, 2015 @ 10:47 PM

[Register](#)

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



Rock Solid Finances Class

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

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

iCalendar Feed

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

Calendar Settings and Formatting

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

```
    {{ EventItem.Description }}  
  
    {{ EventItemOccurrence.Note }}
```

(Remember, Lava templates can be found at [Admin Tools > General Settings > Defined Types > Lava Templates](#).)

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

Calendar URL

The format of the URL has a specific format:

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

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

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

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

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

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

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

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

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

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

Home > Calendars > Public

Event Calendar

Event Calendars Public Event Event Occurrence Content Item

Public [Export Calendar Feed](#)

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

[Edit](#) [Delete](#)

Event Items

Filter Options

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

Bringing It All Together

Hopefully you're starting to see the symbiotic relationship between event registrations and calendar events. The fact that they share the same manual should tell you that they go together like peas and carrots (or steak and potatoes). We've also seen that groups can be linked to registrations, and that content channels also have a role with calendar events.



You might be wondering how you're going to manage all these items for a specific event. We did too, so we worked hard to make it as simple as possible. Here's how.

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

1. Create your event group that the registration will place registrants into.
2. Create your calendar event and occurrence. While editing your occurrence select the `Add New Registration Instance` button. This will allow you to create and link a registration instance right to your event. You'll notice that this screen is the same one from the registration details, except that it has a few extra fields.
 1. **Registration Template:** We can choose which registration template we

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

2. **Group:** From this screen you'll also be able to link the group you created in step #1.
3. **URL Slug:** Say what?! A *slug* is a common web term that refers to a part of a web address that identifies a page or component of a page using human-readable keywords. If you're not Noah Webster, that means instead of saying *Registration?RegistrationInstancelid=153*, you can say *Registration/SummerCamp2015* instead.
3. After saving the occurrence, you can enter any content channel items you need for your event.

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

Url Slug Required

If your event occurrence is tied to a campus, the URL Slug **must be used** in order to have registrants be automatically placed into the correct group.

Securing Calendars and Events

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

Securing Calendars

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

Securing Event Registrations

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

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

Event Blocks

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

Calendar Block

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

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

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

Calendar

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

< **October 2015** >

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

Week Month

Rock Solid Finances Class [View Details >](#)

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

Warrior Youth Event [View Details >](#)

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

Customs & Classics Car Show [View Details >](#)

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

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Event Item Occurrence Detail

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

- **Registration Page:** The page to navigate to for registration.
- **Set Page Title:** Determines if the block should set the page title with the event item name.
- **Lava Template:** The Lava template that will be used to format the list of filtered events.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.
- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.

Rock Solid Church
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Event Details

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

Contact
admin@organization.com

Date / Time
Wednesday, October 28, 2015 @ 10:47 PM

Register

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



Rock Solid Finances Class

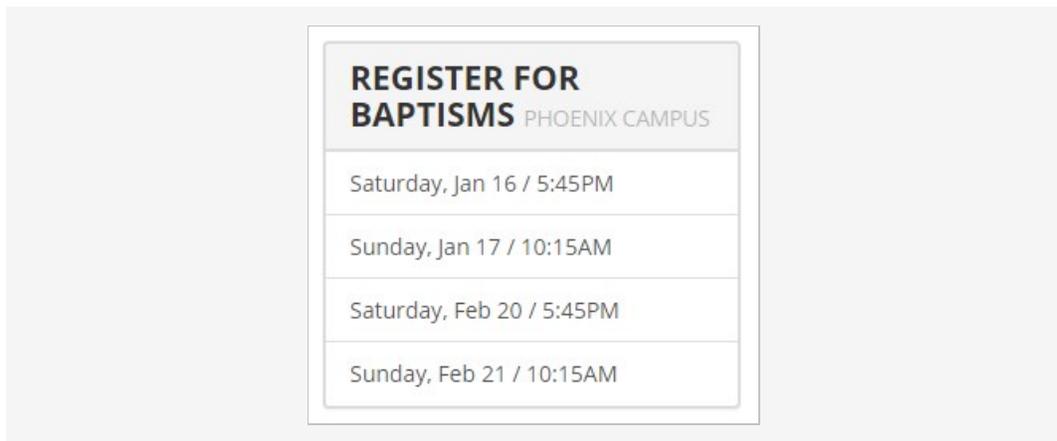
Duis vel massa egestas, cursus odio vestibulum, pulvinar felis. Quisque mattis enim nec libero euismod venenatis id nec arcu. Donec quis lectus leo. Nullam nec enim a massa placerat fermentum. Pellentesque dolor turpis, imperdiet nec nisi sed, ultricies condimentum sapien. Proin facilisis quam diam,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

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3120 W Cholla St Phoenix, AZ 85029

Event Item Occurrence List

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

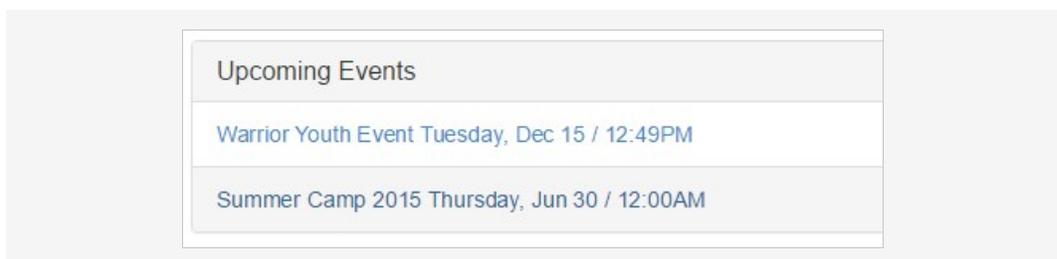
- **Event Item:** The event item to show occurrences for.
- **Campuses:** Which campuses to show occurrences for.
- **Use Campus Content:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site.)
- **Date Range:** You can filter the occurrence list by a sliding date range (e.g. upcoming two weeks).
- **Max Occurrences:** The maximum number of occurrences to show.
- **Registration Page:** The page to navigate to for registration.
- **Lava Template:** The Lava template that will be used to format the list of filtered events.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.
- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.



Calendar Item Occurrence List By Audience

This is another specialty block. It lists upcoming occurrences for a specific audience (All Church, Youth, Children, etc.). This is helpful for pages devoted to these audiences.

- **Audience:** The audience to filter on.
- **Calendar:** Which calendar to use.
- **Use Campus Content:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site.)
- **Date Range:** You can filter the occurrence list by a sliding date range (e.g. upcoming two weeks).
- **Max Occurrences:** The maximum number of occurrences to show.
- **Registration Page:** The page to navigate to for registration.
- **Lava Template:** The Lava template that will be used to format the list of filtered events.
- **Set Page Title:** Determines if the block should set the page title with the calendar name.
- **Enable Debug:** This setting helps you create your Lava template by allowing you to view the Lava objects available.



Event Calendar Item Personalized Registration

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

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

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

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

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

The block requires the following inputs through the URL:

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



Search



Find Starting Point

Home > Person Profile > Find Starting Point



Starting Point Registration

Campus

Main Campus

Select An Upcoming Starting Point



9/5/2018 (Wednesday)

Location: Building 4000 Start Time: 6:30 PM

Contact:

Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus



9/9/2018 (Sunday)

Location: Building 4000 Start Time: 10:30 AM

Contact:

Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus



9/12/2018 (Wednesday)

Location: Building 4000 Start Time: 6:30 PM

Contact:

Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus



9/16/2018 (Sunday)

Location: Building 4000 Start Time: 10:30 AM

Contact:

Alisha Marble
alisha.marble@rocksolidchurchdemo.com
(623) 555-2444

Main Campus

Register



Ted Decker



Noah Decker



Cindy Decker



Alex Decker

Email Reminder Address



ted@rocksolidchurchdemo.com

Start Registration

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