

JANUARY

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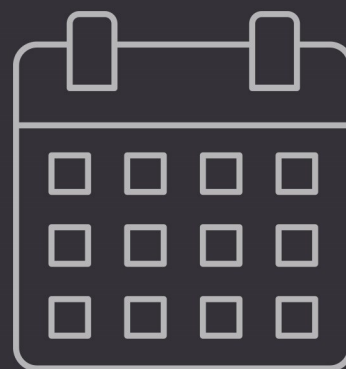
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EVENT CALENDAR GUIDE

Welcome

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

Enable SSL

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

Event Registration Overview

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

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

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

The Basics of Event Registration

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

Registrar vs. Registrant

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

Registration Templates vs. Registration Instances

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

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

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

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

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

The Role of Groups

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

You can also do other clever things with the relationship between registrations and groups. Since nothing is keeping you from having more than one registration linked to a single group, you can handle complex registration scenarios. Say that your summer camp can only take so many boys vs. girls. In Rock you could 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

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Summer Camp 2015

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

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 2015

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First Registrant

First Name * **Last Name ***

Birthday
 / /

Gender

Leader Preference

Cabin Preference

Additional Options

Camp Shirt

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Second Registrant



Alexis is in the same family as *

Katie Franks
 None of the above
 

First Name *

Last Name *

Birthday

/
 /

Gender

Leader Preference

Cabin Preference

Additional Options

Camp Shirt

Summer Camp 2015

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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 2015

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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 2015

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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

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 **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.

7a **Show Family Members**

Selecting *Yes* on the previous *Registrants in same Family* option, will enable this setting. Checking *Yes* here allow users who are logged in to select one of their existing family members for each registrant in a convenient drop down list -- a real time saver for family events.

8 **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.

9 **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.

10 **Cost**

The cost of the registration.

11 **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.

12 **Financial Gateway**

The financial gateway you would like the financial transactions to be

processed with.

13 Batch Name Prefix

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

14 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.

15 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.

16 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.

17 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.

18 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.

18 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.

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		
First Name	Person Field					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Last Name	Person Field					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Birthdate	Person Field					<input checked="" type="checkbox"/>			
Gender	Person Field					<input checked="" type="checkbox"/>			
Leader Preference	Registration Attribute	Text		<input checked="" type="checkbox"/>					
Cabin Preference	Registration Attribute	Text		<input checked="" type="checkbox"/>					

+ Add Form

Form Field Editor

Form Field

Source: Person Attribute

Person Attribute: Ability Level

Internal Field: Yes

Common Value: Yes

Use Current Value: Yes

Required: Yes

Show on Grid: Yes

Pre-Text

Post-Text

Save Cancel

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 you 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
- **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 person attribute of the linked group.
- **Registration Attribute:** The final type allows you to configure new attributes that will be stored with 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.
- **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.

Optional 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.

Before we look at how to configure fees let's look at the various types of fees that are available. Below is a chart showing the four different fee types.

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 learn how to set up these fees.

Fee List

Fees						
	Fee	Options	Cost	Enable Quantity	Discount Applies	
☰	Camp Shirt	Multiple	Small-\$10.00, Medium-\$10.00, Large-\$10.00, X-Large-\$10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="✎"/> <input type="button" value="✖"/>
						<input type="button" value="⊕"/>

Fee Editor

Fee

Name *

Options

Single Multiple

Cost

\$

Enable Quantity ?

Yes

Discount Applies ?

Yes

Save Cancel

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

Discounts

Discounts 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.

Discount List

Code	Discount
STAFF	50.00 %

Discount Editor

Discount Code
✕

Discount Code *

Discount Type

Percentage Amount

Discount Percentage

 %

Save
Cancel

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

From Email

Subject


Confirmation Email Template

```

5 <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Confirmation: {{ RegistrationInstance.Na
6
7 <p>
8 The following {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | PluralizeForQuantity:registra
9 {% if registrantCount > 1 %}have{% else %}has{% endif %} been registered for {{ RegistrationInstance.Name
10 </p>
11
12 <ul>
13 {% for registrant in Registration.Registrants %}
14 <li>
15
16 {{ registrant.PersonAlias.Person.FullName }}
17
18 {% if registrant.Cost > 0 %}
19 - {{ currencySymbol }}{{ registrant.Cost | Format:'#,#0.00' }}
20 {% endif %}
21
22 {% assign feeCount = registrant.Fees | Size %}
23 {% if feeCount > 0 %}
24 <hr/>{{ RegistrationInstance.RegistrationTemplate.FeeTerm | PluralizeForQuantity:registrantCount
25
```

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 2015

The following registrants have been registered for Summer Camp 2015:

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

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

Looking forward to seeing you at camp this year!

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

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

Additional text from the registration instance

Reminder Email

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

RockSolid Church

Registration Reminder

Camp starts on August 26th. We will be leaving from the church at 7am so please don't be late.

Be sure to read our [What To Bring To Camp](#) guide for details on packing for camp.

The following registrants have been registered:

- Katie Franks
- Alexis Decker
- Noah Decker

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

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

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

Additional text from the registration instance

Only shown if a remaining balance exists.

Again, we've provided you with a capable template (shown below). One thing 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

Confirmation Email Template

```
1  {{ 'Global' | Attribute:'EmailHeader' }}
2  {% capture currencySymbol %}{{ 'Global' | Attribute:'CurrencySymbol' }}{% endcapture %}
3  {% capture externalSite %}{{ 'Global' | Attribute:'PublicApplicationRoot' }}{% endcapture %}
4  {% assign registrantCount = Registration.Registrants | Size %}
5
6  <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Payment Reminder</h1>
7
8  <p>
9    This {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm | Downcase }} for {{ RegistrationInst
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
15  <ul>
16  {% for registrant in Registration.Registrants %}
17    <li>{{ registrant.PersonAlias.Person.FullName }}</li>
18  {% endfor %}
19  </ul>
20
21
```

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	Fee Term
<input type="text" value="Registration"/>	<input type="text" value="Additional Options"/>
Registrant Term	Discount Code Term
<input type="text" value="Registrant"/>	<input type="text" value="Discount Code"/>

Success Title [?](#)


Success Text [?](#)

```
1 {% capture currencySymbol %}{ { 'Global' | Attribute:'CurrencySymbol' }}{% endcapture %}
2 {% assign registrantCount = Registration.Registrants | Size %}
3
4 <p>
5 You have successfully registered the following
6 {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | PluralizeForQuantity:registrantCount | Down
7 for {{ RegistrationInstance.Name }}:
8 </p>
9 <ul>
10 {% for registrant in Registration.Registrants %}
11 <li>
12
13 <strong>{{ registrant.PersonAlias.Person.FullName }}</strong>
14
15 {% if registrant.Cost > 0 %}
16 - {{ currencySymbol }}{{ registrant.Cost | Format:'#,##0.00' }}
17 {% endif %}
18
19 {% assign feeCount = registrant.Fees | Size %}
20
21
```

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

- 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 Reminder Send

This check box notes if the reminder for the event registration has been sent. If you'd like to resend a new confirmation simply change the date above and uncheck this box.

10 Reminder Sent

This displays whether the reminder has been sent. This also allows for sending multiple reminders. Once your first reminders is sent you can change the *Send Reminder Date* and uncheck this box. As far as Rock is concerned, that first reminder never existed and will send the new one at the appropriate date/time.

11 Additional Reminder Details

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

12 Additional Confirmation Details

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

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.

The screenshot shows a web page titled "Event Detail Page With Registration Link" for "Rock Solid Church". The page features a navigation bar with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Upcoming Events", and a user greeting "Hello Alisha". The main content area is titled "Event Details" and includes a breadcrumb trail: "Home / Calendar / Summer Camp 2015". On the left, there is a "Contact" section for Jenny Michaels (jenny@rocksolidchurchdemo.com, (602) 555-3245), a "Location" section for Camp Humphreys - Flagstaff, AZ, and a "Date / Time" section for Thursday, September 3, 2015 @ 12:00 AM. A blue "Register" button is prominently displayed. To the right, there is a large image of three smiling children with the text "Summer Camp" overlaid in colorful letters. Below the image, the title "Summer Camp 2015" is followed by several paragraphs of placeholder text. At the bottom of the page, it says "Powered by: Rock RMS" and "3120 W Cholla St Phoenix, AZ 85029".

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

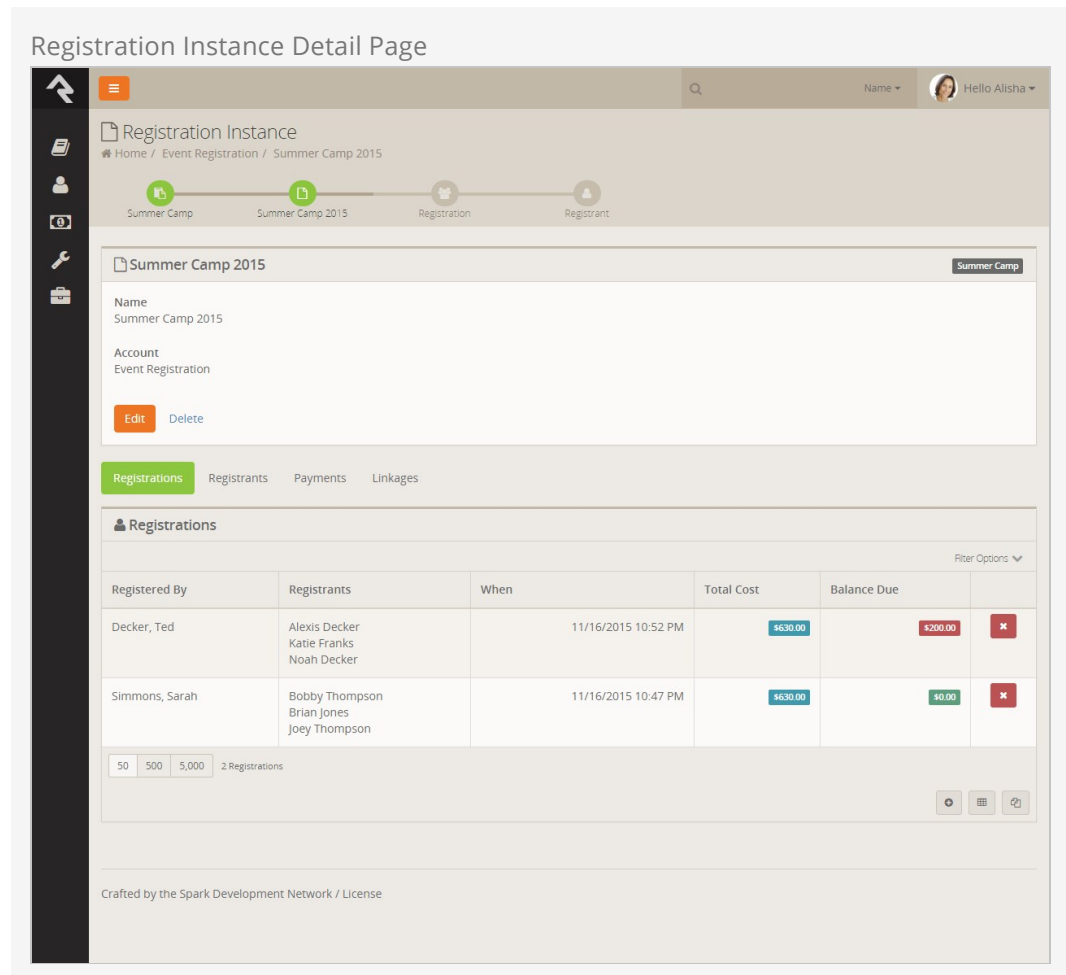
- <http://www.youexternalsite.com/page/999?RegistrationInstanceId=999> (where the page id and registration instance id match the appropriate values)
- <http://www.youexternalsite.com/Registration/<slugname>> (you can find more on *slugs* in the *Bringing It All Together* chapter below)

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 three tabs.

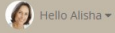
Registrations Tab

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



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

☰
🔍
Name ▾ 

Registration

Home / Summer Camp / Summer Camp 2015 / Registration

Summer Camp
Summer Camp 2015
Alisha Marble
Registrant

Registration Details \$630.00 \$200.00

Registered By
Ted Decker

Confirmation Email
ted@rocksolidchurchdemo.com

[Resend Confirmation](#)

Target Group
General Groups

Cost 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
Paid	\$430.00
Amount Remaining	\$200.00

[View/Edit Payments](#)

Edit Delete
Audit Log

Katie Franks \$210.00

Group General Groups	Cost \$200.00
Birthdate 4/4/2008	Camp Shirt - Small \$10.00
Gender Female	
Leader Preference Cindy Decker	
Cabin Preference Alexis Decker	

Edit Delete

Alexis Decker \$210.00

Group General Groups	Cost \$200.00
Birthdate 2/10/2008	Camp Shirt - Small \$10.00
Gender Female	
Leader Preference Cindy Decker	
Cabin Preference Alexis Decker	

Edit Delete

Noah Decker \$210.00

Group General Groups	Cost \$200.00
Birthdate 3/10/2005	Camp Shirt - Medium \$10.00
Gender Male	
Leader Preference Ted Decker	

Edit Delete

[+ 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 to 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 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. 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

Home / Event Registration / Summer Camp 2015
Search
Hello Alisha

Summer Camp
Summer Camp 2015
Registration
Registrant

Summer Camp 2015
Summer Camp

Name
Summer Camp 2015

Account
Event Registration

Edit
Delete

Registrations
Registrants
Payments
Linkages

Registrants
Filter Options

Registrant	Group	Fees	
Decker, Alexis	General Groups	Camp Shirt (\$10.00)	✖
Decker, Noah	General Groups	Camp Shirt (\$10.00)	✖
Franks, Katie	General Groups	Camp Shirt (\$10.00)	✖
Jones, Brian	General Groups	Camp Shirt (\$10.00)	✖
Thompson, Bobby	General Groups	Camp Shirt (\$10.00)	✖
Thompson, Joey	General Groups	Camp Shirt (\$10.00)	✖

50 500 5,000
6 Registrants

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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 view the financial transaction for the payment. From this transaction detail screen you can process a refund for the payment.

Registration Payments

Home / Event Registration / Summer Camp 2015
Search
Hello Allisha

Summer Camp
Summer Camp 2015
Registration
Registrant

Summer Camp 2015

Name
Summer Camp 2015

Account
Event Registration

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

Registrations
Registrants
Payments
Linkages

Payments

Filter Options ▾

Person	Date / Time	Amount	Payment Method	Account	Transaction Code	Registrar	Registrant(s)
Decker, Ted	11/16/2015 10:52:00 PM	\$430.00	Credit Card - Visa	*****1111	T20151116225244496	Ted Decker	Katie Franks Alexis Decker Noah Decker
Simmons, Sarah	11/16/2015 10:47:00 PM	\$630.00	Credit Card - Visa	*****1111	T20151116224704742	Sarah Simmons	Bobby Thompson Brian Jones Joey Thompson

50 500 5,000 2 Payments

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Linkages Tab

This tab will make more sense once you read the *Bringing It All Together* section. Basically, it shows all of the related calendar events and groups that are linked to this registration.

Registration Instance Registrants

Registration Instance

Home / Event Registration / Summer Camp 2015

Summer Camp Summer Camp 2015 Registration Registrant

Summer Camp 2015

Name
Summer Camp 2015

Account
Event Registration

Edit Delete

Registrations Registrants Payments **Linkages**

Linkages

Filter Options

Calendar Item	Campus	Group	Content Item	Public Name	URL Slug		
Summer Camp 2015 (Public)	All Campuses	General Groups		Summer Camp 2015	SummerCamp2015		

50 500 5,000 1 Linkage

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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.

The screenshot shows the 'Registration Instance' page for 'Summer Camp 2015'. The page includes a breadcrumb trail: Home / Event Registration / Summer Camp 2015. Below the breadcrumb is a progress bar with four steps: Summer Camp, Summer Camp 2015, Registration, and Registrant. The main content area displays the event details for 'Summer Camp 2015', including the name, account (Event Registration), and maximum attendees (200). There are 'Edit' and 'Delete' buttons, and a 'Send Payment Reminder' button. Below the details is a tabbed interface with 'Registrations' selected. The 'Registrations' tab shows a table with the following data:

Registered By	Registrants	When	Total Cost	Balance Due	
Simmons, Sarah	Bobby Thompson Brian Jones Joey Thompson	2/25/2016 2:17 PM	\$600.00	\$0.00	X
Decker, Ted	Alexis Decker Katie Franks Noah Decker	2/25/2016 2:15 PM	\$600.00	\$200.00	X

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 / New Registration Instance / Payment Reminders

Send Payment Reminder

From Name *

Jenny Michaels

From Email *

jenny@rocksolidchurchdemo.com

Subject *

Summer Camp 2015 Payment Reminder

Message

ROCK

Registration Payment Reminder

This registration for Summer Camp 2015 has a remaining balance of \$200.00. The registrants for this Registration are below.

- Noah Decker
- Alexis Decker
- Katie Franks

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:

Outstanding Balances

Below is a list of registrations with outstanding balances. Individuals who have not been reminded of their balance in 30 days have been pre-selected. Those who have been recently added or notified of their balance are greyed out. They can be still be included by either selecting them or selecting all transactions.

<input type="checkbox"/>	Name	Date Registered	Email	Last Reminder Sent	Cost	Amount Paid	Balance Due
<input type="checkbox"/>	Decker, Ted	2/25/2016	ted@rocksolidchurchdemo.com	6 days	\$600.00	\$400.00	\$200.00
<input checked="" type="checkbox"/>	Greggs, Lorraine	1/12/2016	lgregs@fakeinbox.com	32 days	\$400.00	\$200.00	\$200.00

Send Reminders

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- 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.

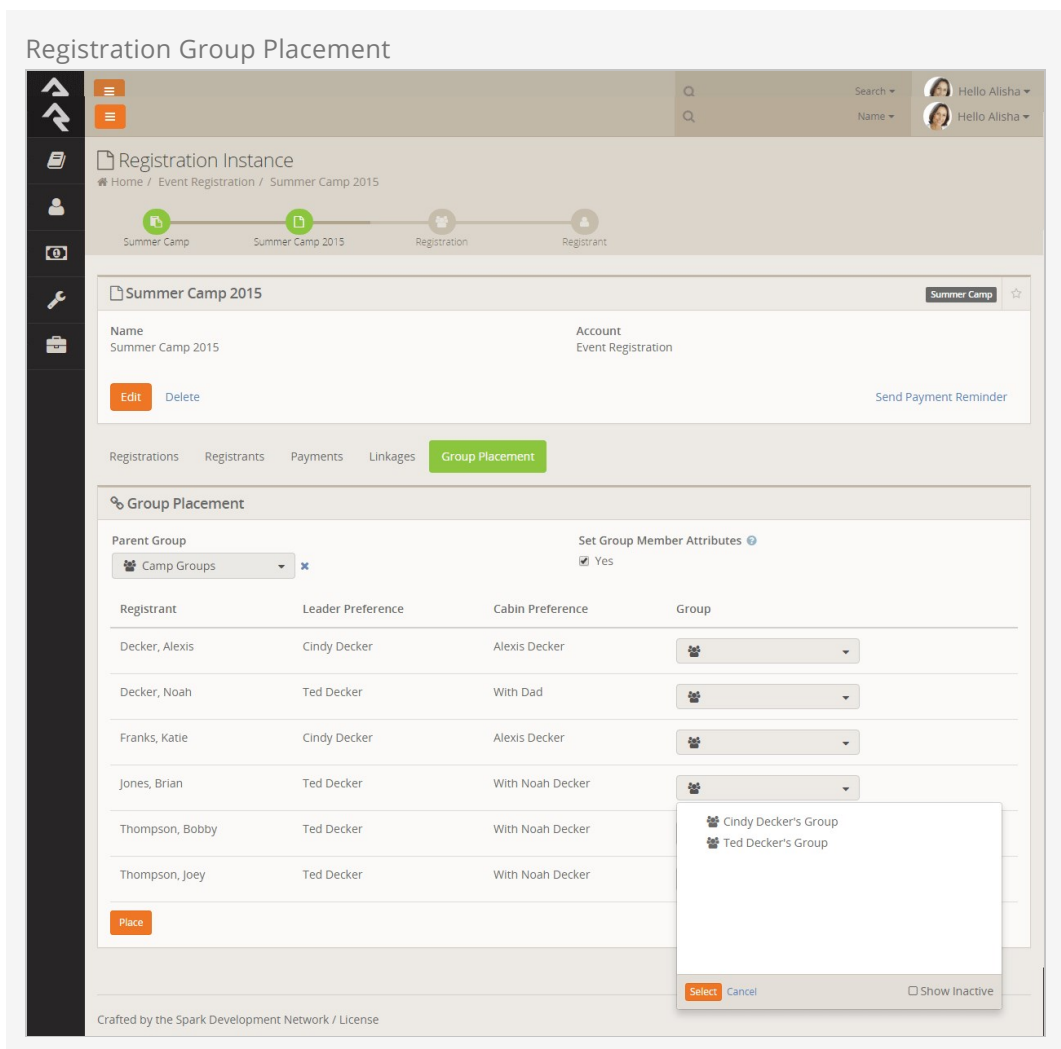
Registration Group Placements

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 `Place` 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).

The screenshot displays the 'Registration Details' page. At the top, there is a breadcrumb trail: Home / Summer Camp / Summer Camp 2015 / Registration. Below this is a progress bar with four steps: Summer Camp, Summer Camp 2015, Ted Decker, and Registrant. The main content area is divided into two columns. The left column contains registration details: 'Registered By: Ted Decker', 'Confirmation Email: admin@organization.com', and 'Target Group: General Groups'. The right column contains a 'Cost Summary' table. At the bottom right, the 'View/Edit Payments' link is highlighted in orange.

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
Paid: \$430.00
Amount Remaining: \$200.00

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 \$630.00 ~~\$200.00~~

Registered By
Ted Decker

Confirmation Email
admin@organization.com

[Resend Confirmation](#)

Target Group
General Groups

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

[Audit Log](#) [🔗](#)

Payments

Date / Time	Details	Amount
11/16/2015 10:52 PM	Decker, Theodore Credit Card - Visa *****1111 T20151116225244496	\$430.00

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

- 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 #115 | Event Registration

Person Ted Decker	Accounts
Date/Time 11/16/2015 10:52 PM	Event Registration \$430.00
Batch Event Registration VMD	Total \$430.00

Source
Website

Transaction Code
T20151116225244496

Account #
*****1111

Currency Type
Credit Card - Visa

Registration
Summer Camp - Summer Camp 2015

Summary
Event registration payment for Summer Camp 2015 [ID:3] (Template: Summer Camp [ID:3]).
Registration By: Admin Admin Total Cost/Fees:\$630.00
Registrants: Katie Franks Cost/Fees:\$210.00, Alexis Decker Cost/Fees:\$210.00, Noah Decker Cost/Fees:\$210.00

Updates
Created by [Ted Decker](#) on 11/16/2015 at 10:52 PM
Last Modified by [Ted Decker](#) on 11/30/2015 at 10:59 PM

[Edit](#) [Refund](#)

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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. May 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 \(Member \)](#)

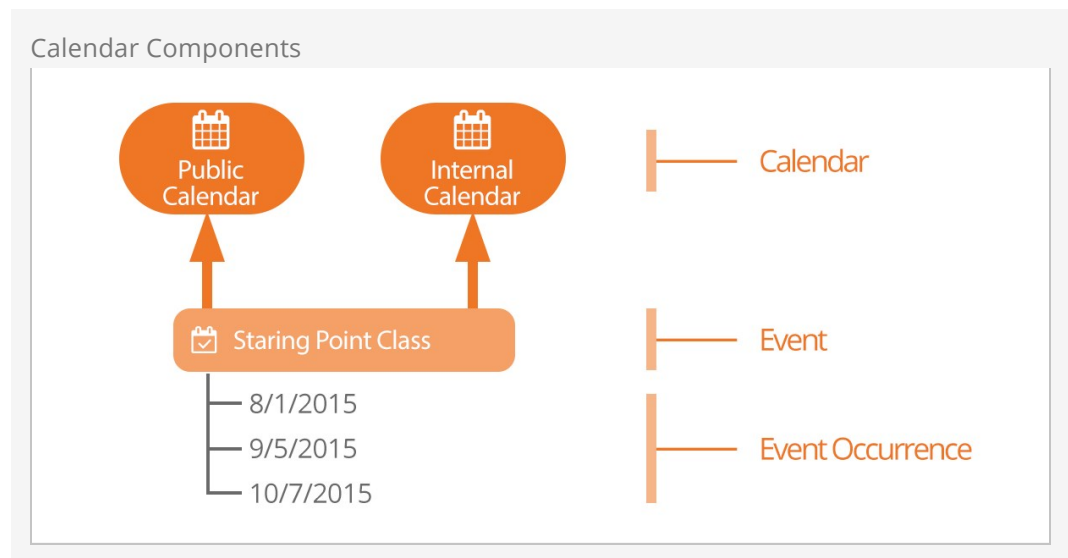
[Decker Group \(Leader *\)](#)

Recent Registrations

[Summer Camp 2015](#)

Calendars

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



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

Event Calendars

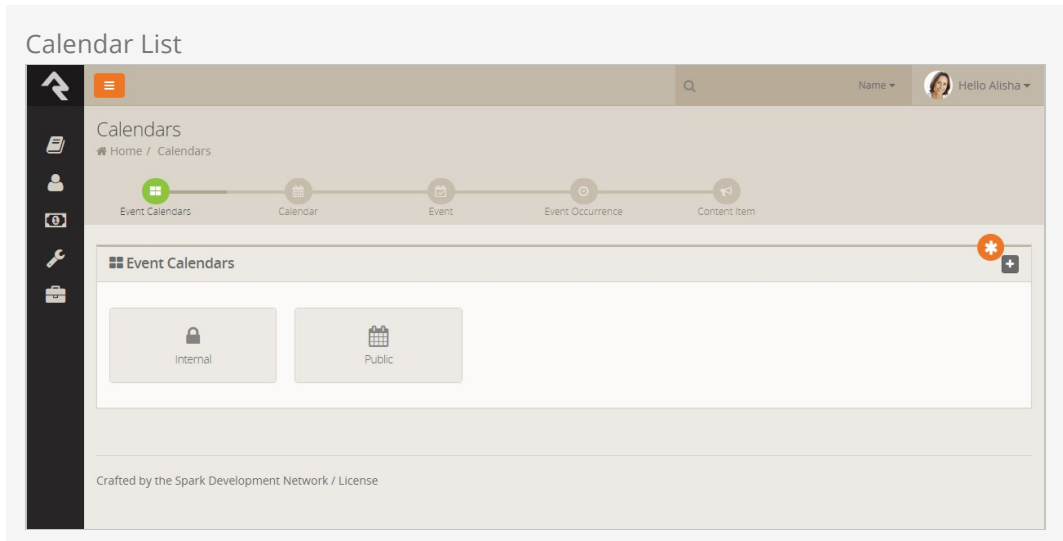
Every organization has the need for multiple calendars. Even a small organization will have a public and private (internal) calendar. Most will have several more. You can administrate calendars under [Tools > Calendars](#).

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

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

Events Can Be Placed On More Than One Calendar:

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



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

Calendar Details


The screenshot shows a web interface for editing a calendar. At the top, there's a navigation bar with 'Event Calendar' and a breadcrumb 'Home / Calendars / Public'. Below that, a series of icons represent different views: Event Calendars, Public, Event, Event Occurrence, and Content Item. The main form is titled 'Public' and contains several sections:

- Name:** A text input field containing 'Public' (callout 1).
- Active:** A checkbox that is checked (callout 2).
- Description:** A text area containing 'A calendar for public events that the church hosts and promotes.' (callout 3).
- Calendar CSS Class:** A text input field containing 'fa fa-calendar' (callout 4).
- Event Attributes:** A table with columns: Attribute, Description, Field Type, Required, Show in Grid, and Allow Search. One attribute is listed: 'Childcare Provided' with a 'Boolean' field type (callout 5).
- Content Channels:** A list of channels with checkboxes. Two are checked: 'External Website Ads' and 'Service Bulletin' (callout 6).

At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page reads 'Crafted by the Spark Development Network / License'.

- 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.

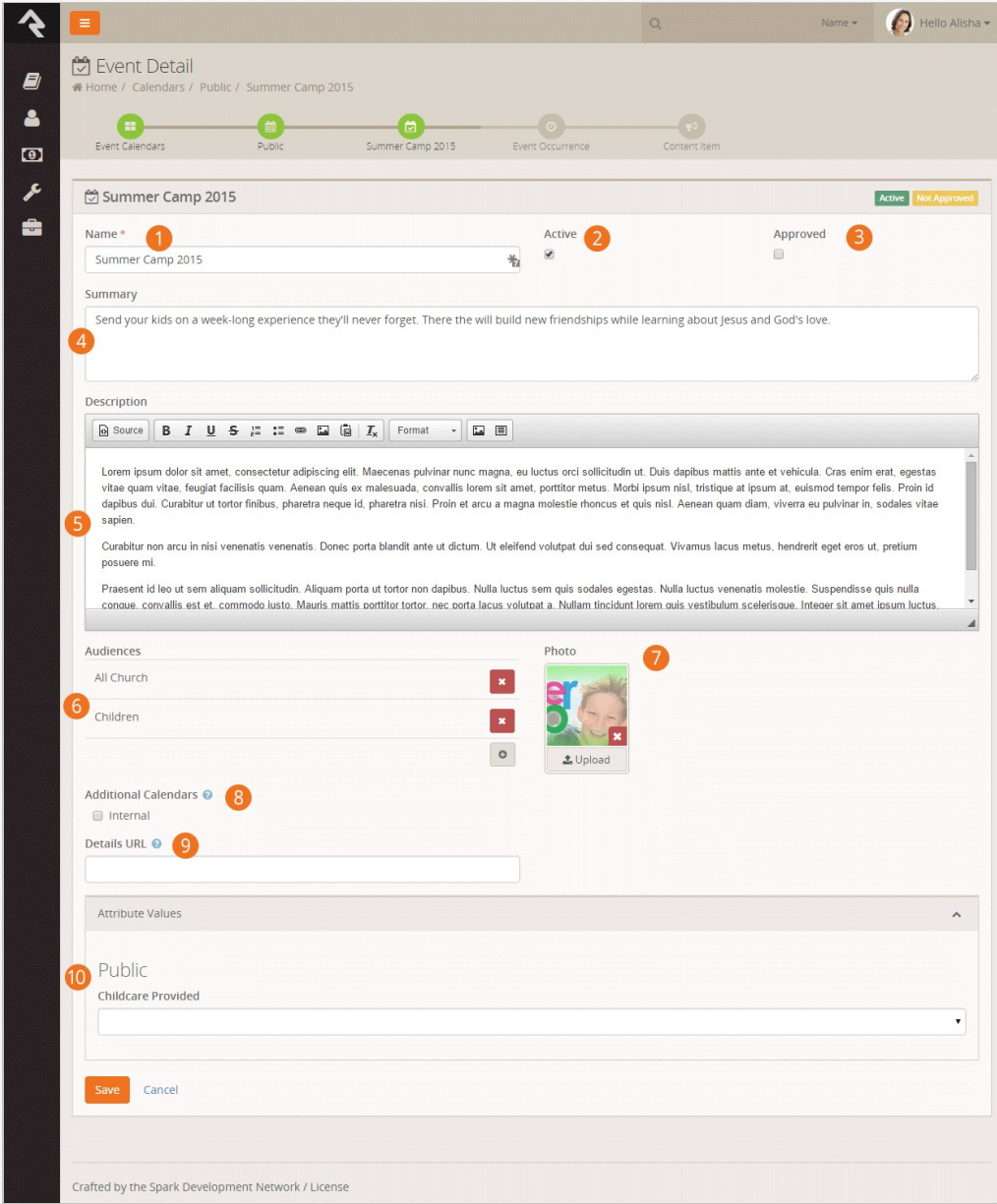
Calendar Security

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 / Summer Camp 2015

Event Calendars Public Summer Camp 2015 Event Occurrence Content Item

Summer Camp 2015 Active Not Approved

Name * Active Approved

Summary
Send your kids on a week-long experience they'll never forget. There they will build new friendships while learning about Jesus and God's love.

Description
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 iusto. Mauris mattis porttitor tortor, nec porta lacus volutpat a. Nullam tincidunt lorem quis vestibulum scelerisque. Integer sit amet ipsum luctus.

Audiences
All Church
Children

Photo
Upload

Additional Calendars
 Internal

Details URL

Attribute Values
Public
Childcare Provided

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 add any content channel items that have been configured for the calendar. This allows you to enter and track promos for your event.

The screenshot displays the 'Event Instance Detail' page. At the top, there's a navigation bar with a search icon and a user profile 'Hello Alisha'. Below the navigation, a breadcrumb trail reads 'Home / Calendars / Public / Summer Camp 2015 / Event Occurrence'. A series of five circular icons represents the navigation path: Event Calendars, Public, Summer Camp 2015, All Campuses, and Content Item.

The main content area is titled 'Event Occurrence' and contains the following details:

- Campus:** All
- Contact:** Jenny Michaels
- Location Description:** Camp Humphreys - Flagstaff, AZ
- Phone:** (602) 555-3245
- Schedule:** Once at 9/3/2015 12:00:00 AM
- Email:** jenny@rocksolidchurchdemo.com
- Registration:** Summer Camp 2015
- Group:** Summer Camp 2015
- Occurrence Note:** Be sure to signup soon as space is limited.

Below the details are 'Edit' and 'Delete' buttons. The 'Content Channels' section contains two tables:

- External Website Ads:** A table with columns for Title, Start, Expire, Priority, and Status. It currently shows 'No Items Found'.
- Service Bulletin:** A table with columns for Title, Active, Priority, and Status. It also shows 'No Items Found'.

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

Calendar Blocks

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

Calendar Block

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

Calendar

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

< **October 2015** >

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

Week Month

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

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

Warrior Youth Event [View Details >](#)

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

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

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

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Event Detail Block

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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](#)



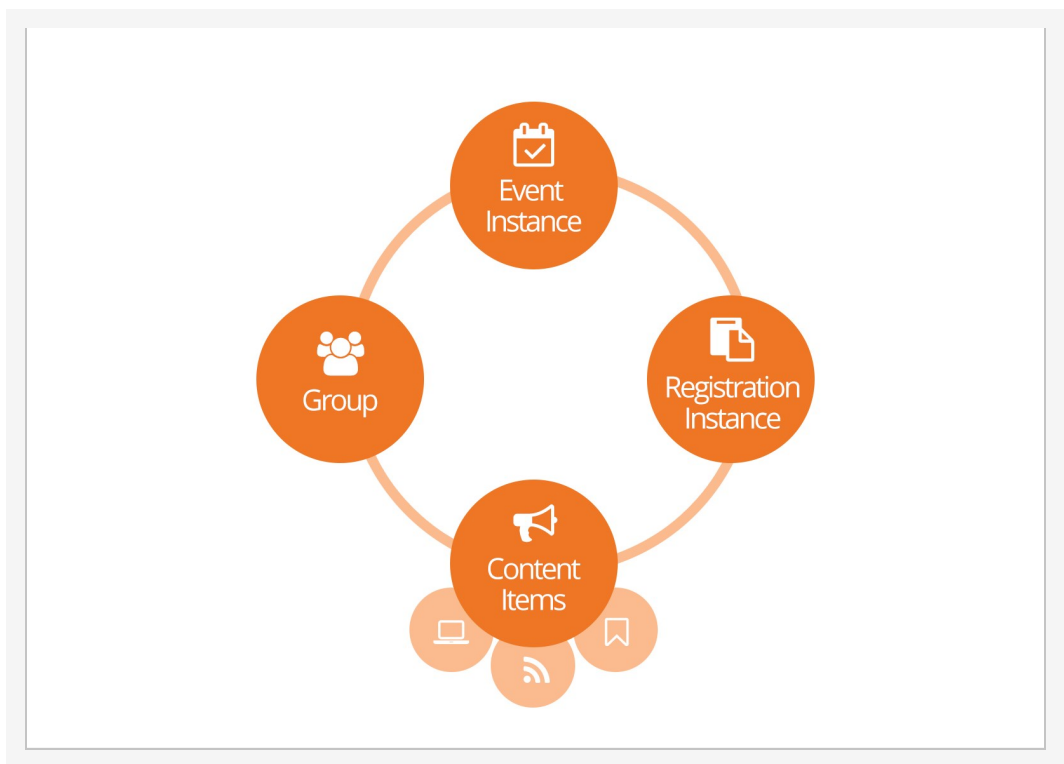
Rock Solid Finances Class

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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Bringing It All Together

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



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

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

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

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

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

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 Calendar Lava

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 Event Item Occurrence Lava

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 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

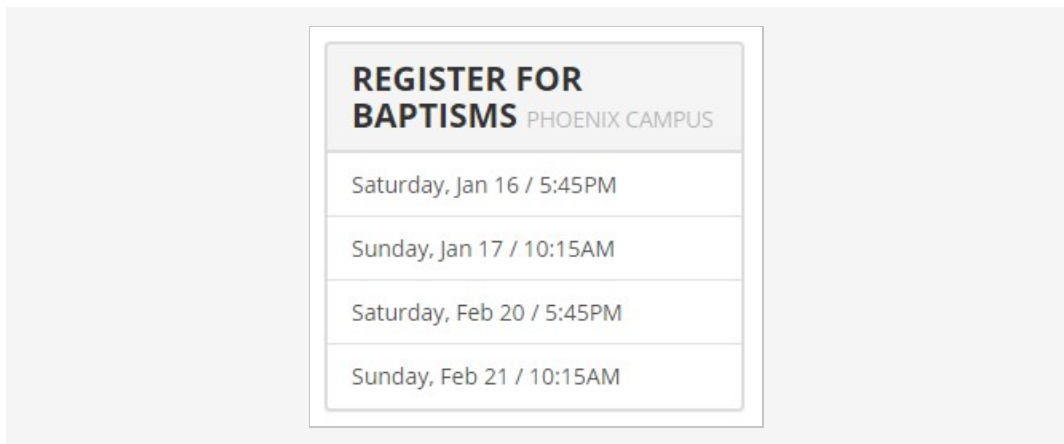
Duis vel massa egestas, cursus odio vestibulum, pulvinar felis. Quisque mattis enim nec libero euismod venenatis id nec arcu. Donec quis lectus leo. Nullam nec enim a massa placerat fermentum. Pellentesque dolor turpis, imperdiet nec nisi sed, ultricies condimentum sapien. Proin facilisis quam diam, 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.

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Event Item Occurrence List Event Item Occurrence List Lava

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

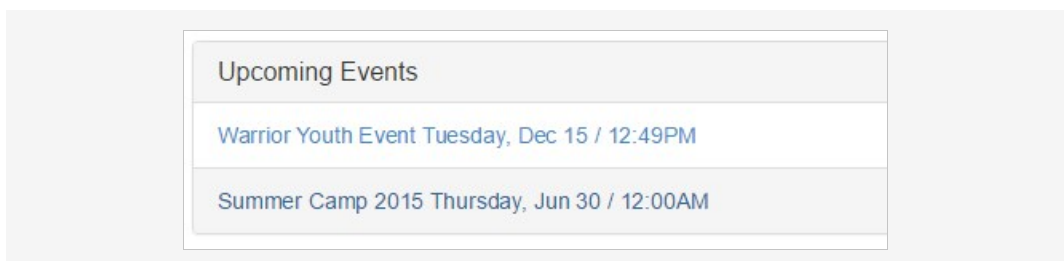
- **Event Item:** The event item to show occurrences for.
- **Campuses:** Which campuses to show occurrences for.
- **Use Campus Content:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site.)
- **Date Range:** You can filter 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 Item Occurrence List By Audience Event Item Occurrence List By Audience Lava

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

- **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 Item Personalized Registration Event 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 create 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.

The screenshot displays a web interface for finding starting points. At the top, there's a navigation bar with a search icon and a user profile for 'Hello Alisha'. Below that, the page title is 'Find Starting Point' with a breadcrumb trail: 'Home / Person Profile / Find Starting Point'. The main content area is titled 'Starting Point Registration' and includes a 'Campus' dropdown menu set to 'Phoenix'. The section 'Select An Upcoming Starting Point' lists four events:

Date	Day	Location	Start Time	Contact
1/6/2016	Wednesday	Building 4000	6:30 PM	Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332
1/10/2016	Sunday	Building 4000	10:30 AM	Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332
2/10/2016	Wednesday	Building 4000	6:30 PM	Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332
2/14/2016	Sunday	Building 4000	10:30 AM	Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332

Below the event list, there are two sections: 'Register' with checkboxes for 'Ted Decker', 'Cindy Decker', 'Noah Decker', and 'Alexis Decker'; and 'Email Reminder Address' with a text input field containing 'ted@rocksolidchurchdemo.com'. A prominent orange 'Start Registration' button is located at the bottom of the form. The footer of the page reads 'Crafted by the Spark Development Network / License'.

