

JANUARY

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MAY

APRIL

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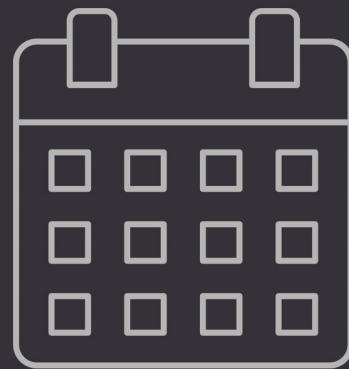
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EVENT CALENDAR GUIDE

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 so you can enable things like event check-in.

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

See our [Rock Your Groups](#) guide for more information.

URL Slug Required

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

A Typical Event Registration

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

Let's get some background on the registration we're walking through below. In this case Ted Decker will be registering his two children Noah and Alexis, as well as Alexis' best

friend Katie for camp. The camp costs \$200 but also has an optional fee for a t-shirt.

Registration Walk-through

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

Summer Camp 2020

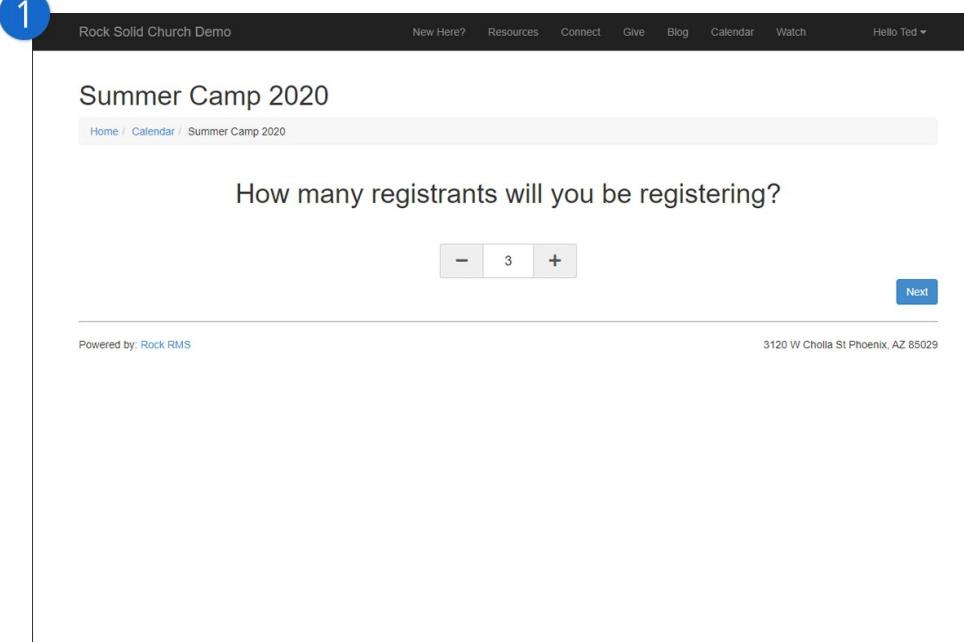
Home / Calendar / Summer Camp 2020

How many registrants will you be registering?

- 3 +

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

Next



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

Summer Camp 2020

Home / Calendar / Summer Camp 2020

First Registrant

Registarant is in the same immediate family as *

Ted Decker None of the above

First Name *
Katie

Last Name *
Franks

Birthday *
Apr / 4 / 2008

Gender *
Female

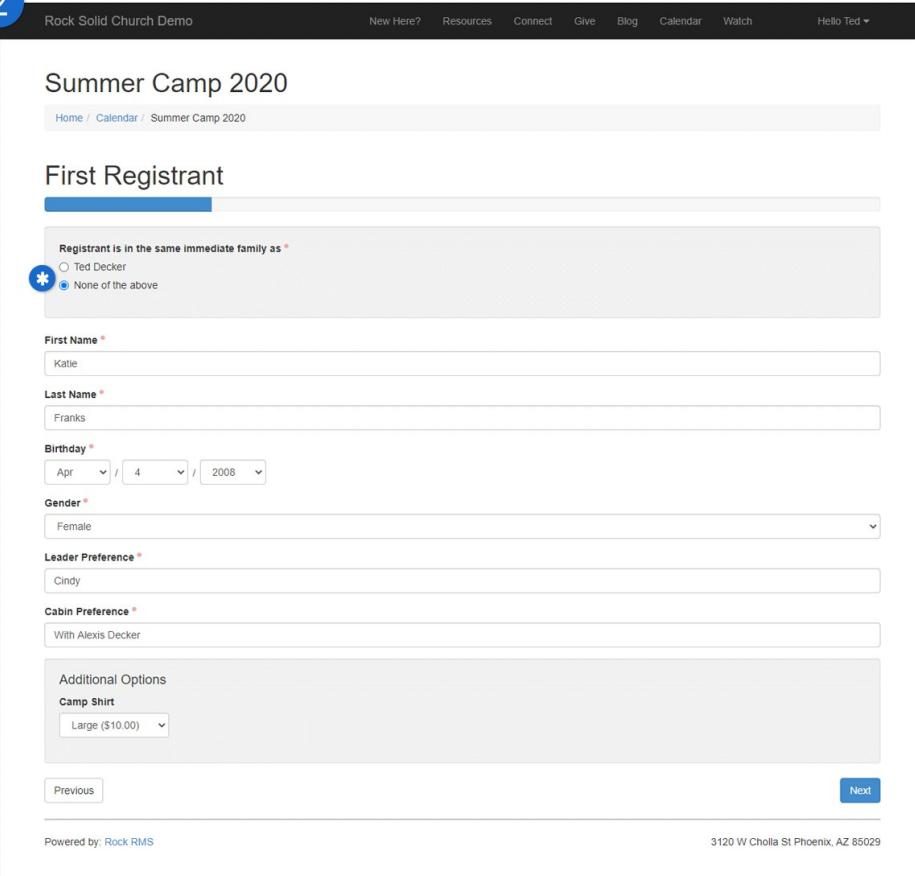
Leader Preference *
Cindy

Cabin Preference *
With Alexis Decker

Additional Options
Camp Shirt
Large (\$10.00)

Previous Next

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



Summer Camp 2020

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

Second Registrant

Alexis is in the same immediate family as *

- Katie Franks
 None of the above

First Name *

Alexis

Last Name *

Decker

Birthday *

Feb / 10 / 2008

Gender *

Female

Leader Preference *

Cindy Decker

Cabin Preference *

With Katie Franks

Additional Options

Camp Shirt

Small (\$10.00)

[Previous](#)

[Next](#)

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Summer Camp 2020

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

Third Registrant

Noah is in the same immediate family as *

- Katie Franks
- Alexis Decker
- None of the above

First Name *

Noah

Last Name *

Decker

Birthday *

Mar / 10 / 2005

Gender *

Male

Leader Preference *

Ted Decker

Cabin Preference *

Any

Additional Options

Camp Shirt

Medium (\$10.00)

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

Powered by: Rock RMS

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5

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

Summer Camp 2020

Home / Calendar / Summer Camp 2020

Review Registration

This Registration Was Completed By

First Name *	Last Name *
Ted	Decker

Send Confirmation Emails To *

Ted is in the same immediate family as *

Katie Franks Alexis & Noah Decker None

Should Your Account Be Updated To Use This Email Address?

Payment Summary

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

Discount Code

Total Cost
\$630.00

Minimum Due Today
\$0.00

Amount To Pay Today *

Amount Remaining
\$0.00

Payment Method

Card Number

VISA **MasterCard** **BankAmericard** **Discover**

Expiration Date /

Card Security Code

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Summer Camp 2020

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

Congratulations Ted

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

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

Total Cost: \$630.00

Paid \$630.00 on 6/2/2020 (Acct #: *****4444, Ref #: T20200602171952832)

Balance Due: \$0.00

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

Make Payments Even Easier

Save account information for future transactions

Powered by: Rock RMS

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1 Step one

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

2 Information 1

And we're off! We'll start by entering the information required for the first child. In this case Ted has entered Katie's information. Because the registration was configured to *Ask if registrants are in the same family*, that's exactly what it's doing. This will help make sure that the data that is entered into Rock is consistent with the actual family structure of the individuals being registered.

3 Information 2

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

4 Information 3

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

5 Payment

Now it's time to pay up! Here we see a nice break down of the costs and fees. We have the opportunity to enter a discount code as well as enter the amount we wish to pay today. You'll also note that the registrar can enter their information here too. Like the registrants, they can select which family they belong to.

6 Confirmation

Done!

Event Wizard

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

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

Overview

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

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

Take the Step

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

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

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

Wizard in Use

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

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

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

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

The screenshot shows the 'Event Wizard' interface for creating a registration template. The top navigation bar includes a logo, search bar, and user profile. On the left, a vertical sidebar features icons for Home, Event Wizard, and other system functions. The main content area is titled 'Event Registration Wizard - Choose a Template'. It displays a horizontal navigation bar with tabs: 'Registration Template' (highlighted), 'Registration', 'Group', 'Event', 'Event Occurrence', and 'Summary'. Below this, there are three input fields: 'Registration Template' dropdown (labeled 1) containing 'Summer Camp', 'Campus' dropdown (labeled 2) containing 'All', and a 'Contact' picker (labeled 3) showing 'Alisha Admin'. There are also fields for 'Contact Email' (admin@organization.com) and 'Contact Phone'. A 'Next' button is at the bottom right. At the very bottom of the page, a footer note reads 'Crafted by the Spark Development Network / License'.

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

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

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

Registration Instance

The screenshot shows the 'Event Registration Wizard - Registration' step of the Event Wizard. The interface includes a navigation bar with icons for Home, Event Wizard, and other sections like Group, Event, Event Occurrence, and Summary. On the left, there's a vertical sidebar with icons for List, Person, Camera, Key, and Briefcase. The main form has 12 numbered fields:

- 1 Registration Name**: Summer Camp 2021
- 2 Registration Starts**: 05/01/2021
- 3 Registration Ends**: 07/31/2021
- 4 Send Reminder Date**
- 5 Maximum Attendees**: 100
- 6 Cost**: \$ 0.00
- 7 Minimum Initial Payment**: \$ 0.00
- 8 Account**: Event Registration
- 9 Default Payment Amount**: \$ 0.00
- 10 Public Name**: Summer Camp 2021
- 11 Slug**: summer-camp-2021
- 12 Registration Customization**

At the bottom are 'Previous' and 'Next' buttons.

1 Registration Name

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

2 Registration Starts

The date the registration is open.

3 Registration Ends

The date the registration is closed.

4 Send Reminder Date

The date and time a reminder will be sent.

5 Maximum Attendees

The total amount of people allowed to attend the event.

6 Cost

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

7 Minimum Initial Payment

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

8 Account

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

9 Default Payment Amount

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

10 Public Name

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

11 Slug

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

12 Registration Customization

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

Event Wizard
Home > Event Wizard

Event Registration Wizard - Group

Registration Template Registration **Group** Event Event Occurrence Summary

1 New Group Name
Summer Camp 2021

2 Parent Group
Parent Group

3 Location
Location

4 Schedule
Schedule

Previous Next

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1 New Group Name

Create your event group that the registration will place registrants into.

2 Parent Group

Choose a parent group for the new group to be under.

3 Location

You'll see this option if you've selected one or more *Check-In Group Types* in the Event Wizard's block settings, and if the registration template you selected in the first step is configured with the selected group type.

4 Schedule

Follows the same rules as the location option.

Event

The screenshot shows the 'Event Wizard' interface. At the top, there's a navigation bar with icons for Home, Search, and a user profile. On the left, a vertical sidebar contains icons for Event, Person, Date, Tools, and Case. The main area is titled 'Event Registration Wizard - Event'. A horizontal progress bar at the top indicates the steps: Registration Template, Registration, Group, Event (which is highlighted in orange), Event Occurrence, and Summary. Below the progress bar, there are two buttons: 'Existing Event' (orange) and 'New Event' (white with blue outline). A blue circle with the number '2' is positioned next to the 'New Event' button. A dropdown menu labeled 'Event *' is open, showing a list of event items. At the bottom right of the main area is an 'Next' button. The footer of the page includes the text 'Crafted by the Spark Development Network / License'.

1 Event

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

2 New Event

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

Event Occurrence

The screenshot shows the Event Wizard interface for creating an event occurrence. The top navigation bar includes a logo, search bar, and user profile. On the left, a vertical sidebar lists icons for Home, Event Wizard, Registration Template, Registration, Group, Event, Event Occurrence (which is highlighted in orange), and Summary. The main content area is titled "Event Registration Wizard - Event Occurrence". A horizontal progress bar at the top indicates the steps: Registration Template, Registration, Group, Event, Event Occurrence (highlighted), and Summary. Below the progress bar, three numbered steps are listed: 1 Location Description, 2 Schedule, and 3 Occurrence Note. Step 1 has a text input field. Step 2 has a "Edit Schedule" button. Step 3 has a rich text editor. At the bottom are "Previous" and "Next" buttons. A footer note says "Crafted by the Spark Development Network / License".

1 Location Description

The description where the event will be held.

2 Schedule

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

3 Occurrence Notes

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

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

Event Wizard Block Properties

Event Wizard Block Properties

Event Registration Wizard Event / Id: 940

Basic Settings Advanced Settings

- 1 Name * Event Registration Wizard
- 2 Default Account Event Registration
- 3 Default Calendar Public
- 4 Available Registration Templates
- 5 Root Group
- 6 Registration Instance Page Registration Instance... (1 route exists)
- 7 Group Viewer Page Group Viewer (1 route exists)
- 8 Require Group No
- 9 Set Registration Instance Active Yes
- 10 Enable Calendar Events Yes
- 11 Allow Creating New Calendar Events Yes
- 12 Require Calendar Events Yes
- 13 Include Inactive Calendar Items Yes
- 14 Completion Workflow
- 15 Check-In Group Types

<input type="checkbox"/> Acme Certificates	<input type="checkbox"/> Check in by Grade	<input type="checkbox"/> High School Area	<input type="checkbox"/> Service Attendance
<input type="checkbox"/> Application Group	<input type="checkbox"/> Check-in Test Area	<input type="checkbox"/> Inherit Fundraising	<input type="checkbox"/> Services
<input type="checkbox"/> Best Groups	<input type="checkbox"/> Communication List	<input type="checkbox"/> Jr High Area	<input type="checkbox"/> Serving Team
<input type="checkbox"/> Campus Team	<input type="checkbox"/> Elementary Area	<input type="checkbox"/> Known Relationship	<input type="checkbox"/> Small Group
<input type="checkbox"/> Check In	<input type="checkbox"/> Family	<input type="checkbox"/> Nursery/Preschool Area	<input type="checkbox"/> Small Group Section
<input type="checkbox"/> Check in by Ability Level	<input type="checkbox"/> Fundraising Opportunity	<input type="checkbox"/> Organization Unit	<input type="checkbox"/> Volunteer Check-in
<input type="checkbox"/> Check in by Age	<input type="checkbox"/> General Group	<input type="checkbox"/> Peer Network	<input type="checkbox"/> Weekly Service Check-in
<input type="checkbox"/> Check in by Data View	<input type="checkbox"/> Global Outreach	<input type="checkbox"/> Security Role	
- 16 Display Link to Event Details Page on Confirmation Screen No
- 17 External Event Details Page Event Details

Save **Cancel**

1 Name

Block property name.

2 Default Account

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

3 Default Calendar

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

4 Available Registration Template

The list of templates the staff person can pick from.

5 Root Group

The start of the group tree for the staff person to pick a parent group.

6 Registration Instance Page

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

7 Group Viewer Page

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

8 Require Group

Yes or No to require a group for created event registrations.

9 Set Registration Instance Active

If set to "No", the new registration instance will be created, but marked as inactive.

10 Enable Calendar Events

If calendar events are not enabled, registrations and groups will be created and linked, but not linked to any calendar event.

11 Allow Creating New Calendar Events

If set to "Yes" the staff person will be offered the "New Event" tab on page 4 and will be able to create both a new event and a new occurrence for that event.

12 Require Calendar Event

Select "Yes" or "No" to require the staff person to put this registration in an event.

13 Include Inactive Calendar Items

Show inactive calendar items to choose from in the list.

14 Completion Workflow

A workflow that will be launched when a new registration is created.

15 Check-in Group Types

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

16 Display Link to Event Details Page on Confirmation Screen

Set this to "Yes" to show the link to the event details page in the wizard confirmation screen.

17 External Event Details Page

Determines which page the link in the final confirmation screen will take you to if the Display Link option (above) is enabled.

Registration Templates

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

General Settings

The screenshot shows the 'General Settings' page for an 'Event Registration' template named 'Summer Camp'. The interface is organized into several sections:

- Left Sidebar:** Includes icons for Home, Event Registration, Registrants, and a search bar.
- Header:** Shows the title 'Event Registration' and the specific template 'Summer Camp'.
- Template List:** A sidebar on the left lists available templates: Connection, General (with 'Summer Camp' selected), Test Event, and Simple Donation.
- Main Content Area:** The 'Summer Camp' template details are displayed.
 - General Tab:** Contains fields for Name (Summer Camp), Category (General), and Description.
 - Details Tab:** Contains settings for Group Type (General Group), Group Member Role (Member), Group Member Status (Active), and various registration options like Allow Multiple Registrants (Yes), Max Registrants Per Registration (10), Registrants In Same Family (Ask), Show Family Members (Yes), and Enable Wait List (Yes).
 - Notify Tab:** Options for Notify (Registration Contact, Group Followers, Group Leaders), Add Person Note (Yes), and Login Required (Yes).
 - Cost Tab:** Set Cost On (Instance or Template), Cost (\$ 0.00), and Financial Gateway (Test Gateway).

16 Minimum Initial Payment ⓘ \$ 0.00

17 Batch Prefix ⓘ 18 SummerCamps_

19 Default Payment Amount ⓘ \$ 0.00

20 Registration Workflow ⓘ

21 Registrant Workflow ⓘ

22 Allow External Updates to Saved Registrations ⓘ Yes

23 Required Signature Document ⓘ

24 In-Line Signature ⓘ Yes

25 Registrant Form(s)

26 Registration Attributes

27 Fees

28 Discounts

29 Placement Configuration

30 Terms/Text

31 Show Communication Settings

Save **Cancel**

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1 Template Name

The name of your template.

2 Active

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

3 Category

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

4 Description

You can optionally provide a description for the template.

5 Group Type / Group Member Role / Group Member Status

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

6 Allow Multiple Registrants

Fairly straight forward.

7 Max Registrants Per Registration

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

8 Registrar Options

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

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

9 Registrants In Same Family

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

9a Show Family Members

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

10 Enable Wait List

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

11 Notify

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

1. **Registration Contact:** This is configured on the registration instance.
2. **Group Followers:** The groups that the registration is linked to can be

followed by people with view permissions.

3. **Group Leaders:** All of the individuals that have roles that are marked *Is Leader* in the group linked to the registration will receive an email.

12 Add Person Note

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

13 Login Required

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

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 each individual 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 Prefix

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

19 Default Payment Amount

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

20 Registration Workflow

This setting allows you to set a workflow to be run with each registration. A similar setting exists on the instance if you need a different workflow per instance. Note that the workflow is only launched if the registration is done through the *Registration Entry* block on the external site.

21 Registrant Workflow

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

22 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.

23 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.

24 Show Communication Settings

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

Digital Signatures

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

Forms

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

Form Field List

Registrant Form(s)

Field	Source	Type	Internal	Common	Use Current Value	Required	Show on Grid	Show on Wait List	
First Name	Person Field				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Last Name	Person Field				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Birthdate	Person Field				<input checked="" type="checkbox"/>				
Gender	Person Field				<input checked="" type="checkbox"/>				
Team Color Preference	Registrant Attribute								
Team Color Preference	Registrant Attribute								

+ 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.

Form Field Editor

Registrant Form Field Id: 0

Source	Internal Field <small>i</small>	Common Value <small>i</small>	Use Current Value <small>i</small>
Person Field	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Person Field	Required <small>i</small>	Show on Grid <small>i</small>	Show On Wait List <small>i</small>
Address	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Pre-HTML			
<code>1 </code>			
Post-HTML			
<code>1 </code>			

Save Cancel

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.
- **Registrant Attribute:** The final type allows you to configure new attributes that will be stored with the registrant.

You'll notice a few other settings on the add screen. Here's how they're used:

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

Conditional Registration Fields

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

Gender field

First Name *
Noah

Last Name *
Decker

Birthday *
Mar / 10 / 2005

Gender *
▼

Additional Options
Camp Shirt
Medium (\$10.00 ▼)

Powered by: Rock RMS

3120 W Cholla St Phoenix, AZ 85029

Next

The conditional field options - in this case, the Team Color Preference will be different based on the Gender selection.

Conditional field from Gender selection

First Name *
Noah

Last Name *
Decker

Birthday *
Mar / 10 / 2005

Gender *
Male

Team Color Preference
Green

Additional Options
Camp Shirt
Medium (\$10.00 ▼)

Powered by: Rock RMS

3120 W Cholla St Phoenix, AZ 85029

Next

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

Registrant Attribute

Registrant Form Field Id: 4010

Source Registrant Attribute	Internal Field <small>i</small> <input type="checkbox"/> Yes	Common Value <small>i</small> <input type="checkbox"/> Yes	Show On Wait List <small>i</small> <input checked="" type="checkbox"/> Yes
Name <small>*</small> Team Color Preference	Active <small>i</small> <input checked="" type="checkbox"/> Yes		
Description Male Team Colors			
Categories <input type="button" value=""/>	Field Type Single-Select		
Key <small>*</small> TeamColorPreference	Values <small>i</small> Blue, Green, Orange		
Required <input type="checkbox"/> Require a value	Show in Grid <small>i</small> <input type="checkbox"/> Yes	Control Type <small>i</small> <input type="button" value="Drop Down List"/>	
		Default Value <input type="button" value=""/>	

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

Limitations on Conditional Fields

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

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

Add Criteria

Form Field Filter

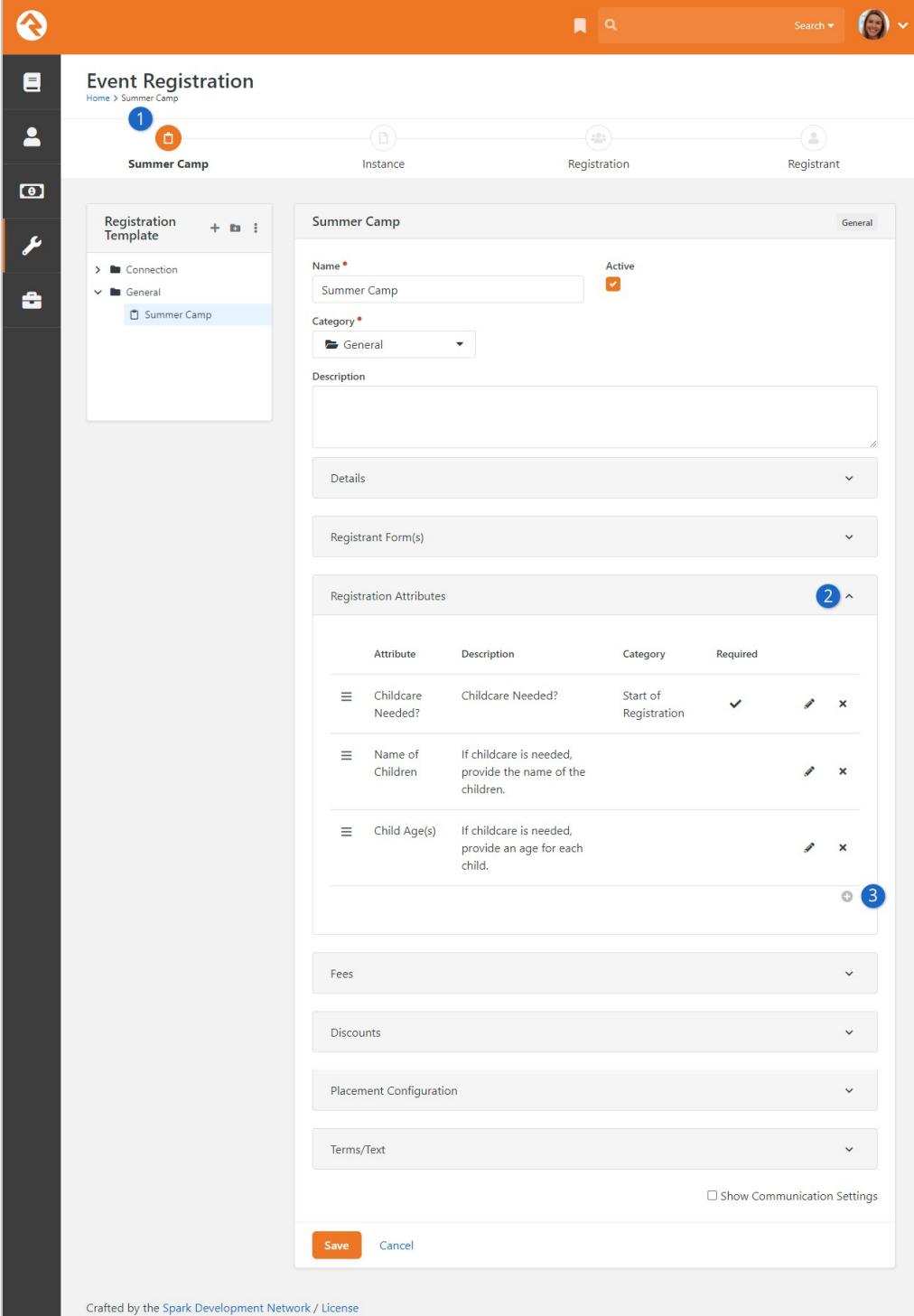
Show <small>v</small>	Team Color Preference	if <small>v</small>	All <small>v</small>	of the following match:	
 					
Gender <small>i</small>					
Gender		Equal To	Male		
 					 Save  Cancel

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

Registration Attributes

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

Registration Attribute Editor



Event Registration
Home > Summer Camp

1

Summer Camp

Instance

Registration

Registrant

Registration Template

Name *
Summer Camp

Category *
General

Description

Details

Registrant Form(s)

Registration Attributes

Attribute Description Category Required

Attribute	Description	Category	Required
Childcare Needed?	Childcare Needed?	Start of Registration	✓
Name of Children	If childcare is needed, provide the name of the children.		✗
Child Age(s)	If childcare is needed, provide an age for each child.		✗

Fees

Discounts

Placement Configuration

Terms/Text

Show Communication Settings

Save Cancel

Crafted by the Spark Development Network / License

1 **Template Name**

The name of your template.

2 Registration Attributes

Attribute drop down, located on the main template section below the registrant forms.

3 Add Attribute

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

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

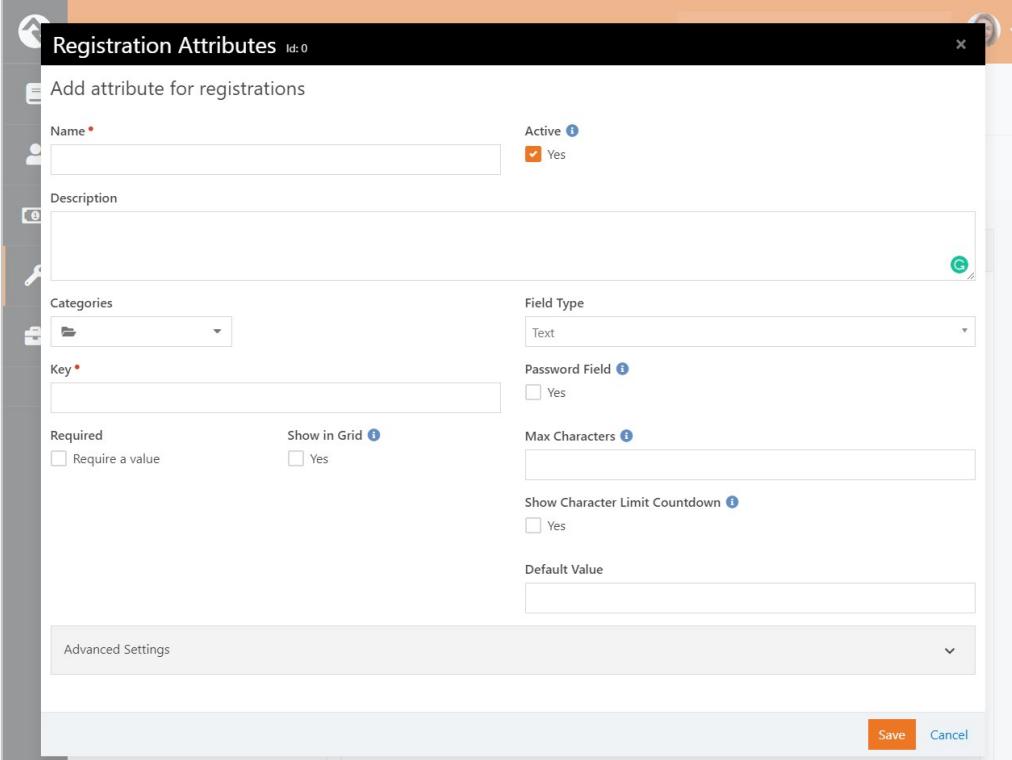
Attribute Page

Registration Attributes Id: 0

Add attribute for registrations

Name *	<input type="text"/>	Active <input checked="" type="checkbox"/> Yes
Description	<input type="text"/>	
Categories	<input type="button" value=""/>	Field Type <input type="text"/>
Key *	<input type="text"/>	
Required <input type="checkbox"/> Require a value	Show in Grid <input type="checkbox"/> Yes	Max Characters <input type="text"/>
		Show Character Limit Countdown <input type="checkbox"/> Yes
Default Value <input type="text"/>		
Advanced Settings		

Save Cancel



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

Confirmation Email

After completing the registration, you can set up a confirmation email. This email also acts as an emailed receipt. Remember that the below settings are only visible if you enable *Show Communication Settings* at the bottom of the page under the 'Terms/Text' section.

Confirmation Email Settings

The screenshot shows a configuration interface for a confirmation email. At the top, there's a header "Confirmation Email". Below it, there are four input fields: "From Name" containing "{{ RegistrationInstance.ContactPersonAlias.Pers }}", "From Email" containing "{{ RegistrationInstance.ContactEmail }}", and "Subject" containing "{{ RegistrationInstance.Name }} Confirmation". Underneath these is a section titled "Email Template" which contains the following code:

```
1  {{ 'Global' | Attribute:'EmailHeader' }}
2
3
4  <h1>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Confirmation: {{ RegistrationInstance.Name }}</h1>
5
6  {% assign registrants = Registration.Registrants | Where:'OnWaitList', false %}
7  {% assign registrantCount = registrants | Size %}
8  {% if registrantCount > 0 %}
9    <p>
10      The following {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm | PluralizeForQuantity:registrantCount | Downcase }}%
11      {% if registrantCount > 1 %}have{% else %}has{% endif %} been registered for {{ RegistrationInstance.Name }}:
12    </p>
13
14    <ul>
15      {% for registrant in registrants %}
16        <li>
17          <strong>{{ registrant.PersonAlias.Person.FullName }}</strong>
18        </li>
19      {% endfor %}
20    </ul>
21
22  {% endif %}
23
24  <hr>
```

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: [info@rocksolidchurchdemo.com](#)
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. Like the other communications, these settings are only visible if you enable *Show Communication Settings* at the bottom of the page under the 'Terms/Text' section.

Reminder Email Settings

The screenshot shows the 'Reminder Email Settings' configuration screen. It includes fields for 'From Name' ({{ RegistrationInstance.ContactPersonAlias.Pe }}, expanded to show {{ RegistrationInstance.ContactPersonAlias }}), 'From Email' ({{ RegistrationInstance.ContactEmail }}), 'Subject' ({{ RegistrationInstance.Name }} Reminder), and an 'Email Template' editor. The template code is as follows:

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

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

Reminder Email

The screenshot shows a registration reminder email from RockSolidChurch. At the top is the church's logo and name. Below it, the section title "Registration Reminder" is displayed. A note about camp start time and leaving the church at 7am follows. A link to a packing guide is provided. A list of registered participants is shown. A message about a remaining balance of \$200.00 and a link to an online registration page are included. Contact information for the church is listed in a box, along with a note that only appears if a balance exists.

Additional text from the registration instance

Only shown if a remaining balance exists.

Payment Reminder Email

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

Payment Reminder Email Settings

Payment Reminder Email

From Name
{{ RegistrationInstance.ContactPersonAlias.Pers }}

From Email
{{ RegistrationInstance.ContactEmail }}

Subject
{{ RegistrationInstance.Name }} Payment Reminder

Email Template

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

```

Payment Reminder Time Span [?](#)
14

Terms / Text

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

Terms and Text Settings

Terms/Text

Registration Term	Fee Term
Registration	Additional Options
Registrant Term	Discount Code Term
Registrant	Discount Code
Registration Attribute Title - Start ⓘ	Registration Attribute Title - End ⓘ
Registration Information	Registration Information
Success Title ⓘ	
Congratulations {{ Registration.FirstName }}	
Registration Instructions ⓘ	
Registration Confirmation Text ⓘ	
<pre>1 {% assign registrants = Registration.Registrants Where:'OnWaitList', false %} 2 {% assign registrantCount = registrants Size %} 3 {% if registrantCount > 0 %} 4 <p> 5 You have successfully registered the following 6 {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm PluralizeForQuantity 7 :registrantCount Downcase }} 8 for {{ RegistrationInstance.Name }}: 9 </p> 10 11 {% for registrant in registrants %} 12 13 {{ registrant.PersonAlias.Person.FullName }} 14 15 {% if registrant.Cost > 0 %} 16 - {{ registrant.Cost FormatAsCurrency }} 17 {% endif %} 18 19 {% assign feeCount = registrant.Fees Size %} 20 21 {% endfor %} 22 </pre>	

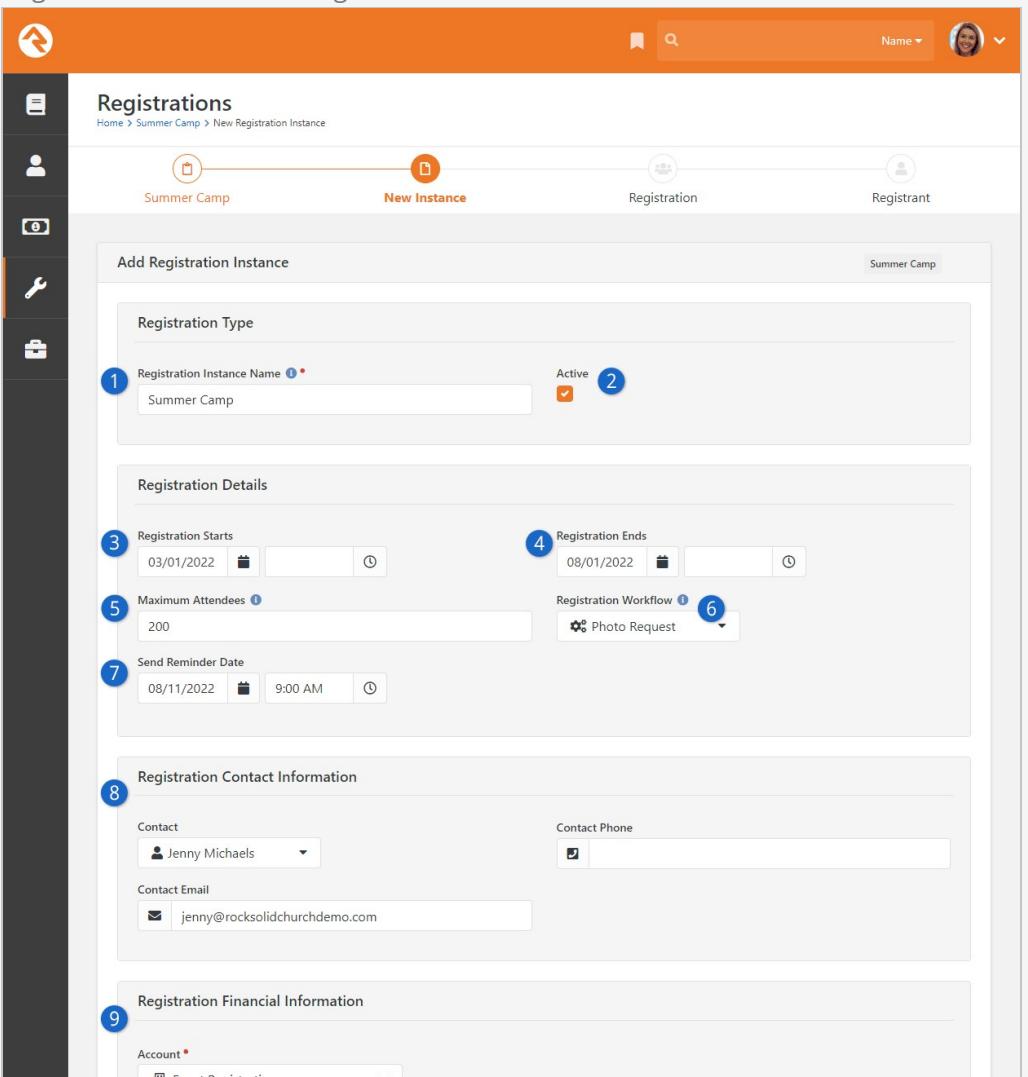
Registration Instances

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

Instance Settings

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

Registration Instance Settings



The screenshot shows the 'Registrations' section of the software. On the left is a vertical sidebar with icons for Home, Registrants, Registrations, Reports, and Help. The main area has tabs for 'Summer Camp' (selected), 'New Instance' (highlighted in orange), 'Registration', and 'Registrant'. The title bar says 'Registration Instance Settings'. The main content is a form titled 'Add Registration Instance' under 'Summer Camp'. The form is divided into sections: 'Registration Type' (step 1: 'Registration Instance Name' set to 'Summer Camp', step 2: 'Active' checked), 'Registration Details' (step 3: 'Registration Starts' on 03/01/2022, step 4: 'Registration Ends' on 08/01/2022, step 5: 'Maximum Attendees' set to 200, step 6: 'Registration Workflow' set to 'Photo Request', step 7: 'Send Reminder Date' on 08/11/2022 at 9:00 AM), 'Registration Contact Information' (step 8: 'Contact' set to 'Jenny Michaels', 'Contact Email' set to 'jenny@rocksolidchurchdemo.com'), and 'Registration Financial Information' (step 9: 'Account' set to 'Event Registration').

The screenshot shows the configuration interface for a registration instance. It includes sections for:

- Registration Messages**: A rich text editor (numbered 10) for sending messages to registrants.
- Additional Reminder Details**: A rich text editor (numbered 11) containing instructions: "Camp starts on January 16. We will be leaving from the church at 7am so please don't be late." and a link to "What To Bring To Camp".
- Additional Confirmation Details**: A rich text editor (numbered 12) containing the message: "Looking forward to seeing you at camp this year!"
- Registration Session**: Settings for session timeout (numbered 13) and threshold (numbered 14).

At the bottom, it says "Crafted by Spark Development Network / License".

1 Registration Instance Name

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

2 Active

This determines if the registration instance is currently active.

3 Registration Starts

The date and time that the registration starts.

4 Registration Ends

The date and time that the registration ends.

5 Maximum Attendees

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

6 Registration Workflow

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

7 Send Reminder Date

The date and time that the reminder should be sent.

8 Registration Contact Information

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

9 Account

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

10 Registration Instructions

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

11 Additional Reminder Details

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

12 Additional Confirmation Details

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

13 Timeout Length

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

14 Timeout Threshold

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

Setting the Price on the Registration Instance

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

Timeout Settings

By default the registration process will ensure that events don't oversell. The default behavior of the registration process is to check the number of registrants desired

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

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

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

Obsidian Registration Entry Block

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

Follow A Registration Instance

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

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

Registration Fees

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

Fee Types

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

Types of Fees

1 Single Option

T-Shirt (\$10.00)



2 Single Option with Quantity

T-shirt (\$10.00)

0	+	-
---	---	---

3 Multiple Options

T-Shirt

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

4 Multiple Options with Quantity

T-shirt

S (\$10.00)

0	+	-
---	---	---

M (\$15.00)

0	+	-
---	---	---

L (\$20.00)

0	+	-
---	---	---

1 Single Option Fee

You either want it or you don't.

2 Single Option Fee with Quantity

You can get as many as you want.

3 Multiple Options

Variety is the spice of life.

4 Multiple Options with Quantity

What's better than a little spice? A whole lot!

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

Setting Up Fees

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

Fee List

Fees						
Fee	Options	Cost	Enable Quantity	Discount Applies	Is Active	Is Required
☰ Camp Shirt	Multiple	Small- \$10.00, Medium- \$10.00, Large- \$10.00, X-Large- \$10.00	✓			

Click the  button to create a new fee.

Fee Editor

Fee

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

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

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

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

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

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

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

Save **Cancel**

Optional vs. Required Fees

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

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

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

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

Required Fees Options

Fee

Costs <small>i</small>		
Small	\$ 10.00	Max Available
Medium	\$ 10.00	Max Available
Large	\$ 10.00	Max Available
X-Large	\$ 10.00	Max Available

Single Multiple

Enable Quantity i
 Yes

Is Required i
 Yes

Discount Applies i
 Yes

Is Active i
 Yes

Save **Cancel**

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

Optional Fees Options

Fee

Name *	Camp Shirt		
Options	<input type="radio"/> Single	<input checked="" type="radio"/> Multiple	
Costs i	Small	\$ 10.00	99
	Medium	\$ 10.00	0
	Large	\$ 10.00	70
	X-Large	\$ 10.00	Max Available

Enable Quantity i
 Yes

Is Required i
 Yes

Discount Applies i
 Yes

Is Active i
 Yes

Save **Cancel**

Registering with Optional Fees

First Name *			
Last Name *			
Birthday *	<input type="text"/>	/	<input type="text"/>
Gender *	<input type="text"/>		
Leader Preference *	<input type="text"/>		
Cabin Preference *	<input type="text"/>		
Additional Options			
Camp Shirt			

Previous **Next**

Fee Reports

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

Viewing Fees

The screenshot shows the Fees module interface. At the top, there's a navigation bar with icons for Home, Search, and User profile. Below the navigation is a breadcrumb trail: Home > Summer Camp > Summer Camp. The main content area has tabs for Summer Camp, Registration, and Registrant. The Summer Camp tab is selected, displaying details like Name (Summer Camp), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2022), and Registration Ends (7/31/2022). Below these details are 'Edit' and 'Delete' buttons. Underneath the registration details are tabs for Registrations, Registrants, Payments, Fees (which is highlighted in orange), Discounts, and Linkages. The Fees tab displays a table of fees. The table has columns for Registration Date, Registered By, Registrant, Fee Name, Option, Quantity, Cost, and Fee Total. Two rows of data are shown: one for a Small Camp Shirt at \$10.00 and another for a Medium Camp Shirt at \$10.00. At the bottom of the fees table are buttons for 'Apply Filter' and 'Clear Filter'. A footer at the bottom of the page says 'Crafted by Spark Development Network / License'.

Registration Date	Registered By	Registrant	Fee Name	Option	Quantity	Cost	Fee Total
6/6/2022	Ted Decker	Alex Decker	Camp Shirt	Small	1	\$10.00	\$10.00
6/6/2022	Ted Decker	Noah Decker	Camp Shirt	Medium	1	\$10.00	\$10.00

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

Discounts

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

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

The screenshot shows a 'Discount List' window with a single row of data. The columns are labeled 'Code' (containing 'STAFF'), 'Discount' (containing '50.00 %'), and 'Limits' (with edit and delete icons). A '+' button is located at the bottom right of the table area.

Code	Discount	Limits
STAFF	50.00 %	

Click the button to create a new discount.

The screenshot shows the 'Discount Editor' dialog box for creating a new discount code. It includes fields for 'Discount Code' (input field), 'Discount Type' (radio buttons for Percentage or Amount), 'Discount Percentage' (input field with a slider), 'Auto Apply Discount' (checkbox), 'Maximum Usage' (input field), 'Maximum Registrants' (input field), 'Minimum Registrants' (input field), 'Effective Dates' (date range input fields), and a 'Save' button.

Discount Code •
Discount Type
Percentage Amount
Discount Percentage
0 %
Auto Apply Discount
Maximum Usage
Maximum Registrants
Minimum Registrants
Effective Dates to
Save Cancel

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

One Discount Per Registration Instance

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

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

Discount Codes

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

Quantity Discounts

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

Maximum Registrants

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

Early Bird Discounts

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

Customized Discounts

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

Automatic Discounts

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

Maximum Usage

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

Viewing and Reporting Used Discounts

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

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

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

Managing Event Registrations

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

Promoting Your Registration

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

Event Detail Page With Registration Link

The screenshot shows a web page for 'Rock Solid Church Demo'. At the top, there's a navigation bar with links for 'New Here?', 'Resources', 'Connect', 'Give', 'Blog', 'Calendar', 'Watch', and a dropdown for 'Hello Alisha'. The main content area has a title 'Event Details' and a breadcrumb trail 'Home / Calendar / Camp 2021'. To the left, there's a sidebar with contact information (Jenny Michaels, jenny@rocksolidchurchdemo.com, (602) 555-1234), location (Camp Humphreys - Flagstaff, AZ), and date/time (Monday, August 9, 2021 @ 8:00 AM). A large blue 'Register' button is prominently displayed. Below it are social sharing icons for Facebook, Twitter, Email, and Print. The main content area features a large image of three smiling children with the text 'Summer Camp' overlaid. The text 'Camp 2021' is centered below the image. There are several paragraphs of placeholder text (Lorem ipsum...) and a small note about powered by Rock RMS at the bottom.

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

- <http://www.youreexternalsite.com/page/999?RegistrationInstanceId=999> (where the page id and registration instance id match the appropriate values)
- <http://www.youreexternalsite.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 shows the 'Registration Instance Detail Page' for 'Summer Camp 2021'. The top navigation bar includes a logo, search, and user profile. The left sidebar has icons for Home, Event Registration, and other system functions. The main content area displays registration details: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). Below this, there are 'Edit' and 'Delete' buttons, and a 'Send Payment Reminders' link. A 'Registrations' tab is selected, showing a table of registrants. The table has columns for Registered By, Registrants, When, Total Cost, and Balance Due. One row is visible for 'Decker, Ted' with 'Alex Decker' as the registrant, registered on 7/22/2021 at 5:02 PM, with a total cost of \$210.00 and a balance due of \$210.00. A 'Filter Options' dropdown is open above the table. At the bottom, there's a note about being crafted by 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 > Event Registration > Summer Camp 2021 > Registration

Summer Camp Summer Camp 2021 Ted Decker Registrant

1 Registration Details

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

Total Cost	\$210.00
Paid	\$0.00
Amount Remaining	\$210.00

2 Alex Decker

Birthdate	Cost
2/10/2011	\$200.00
Gender	Camp Shirt-Small
Male	\$10.00
Leader Preference	
Sally	
Cabin Preference	
Bears	

3 Account **Fees** **Payments**

4 Audit Log **5 Move Registration**

6 + Add New Registrant

Crafted by Spark Development Network / License

1 Registration Details

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

2 Registrant Details

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

3 Financial Information

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

4 Audit Log

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

5 Move Registration

Sometimes a registration needs to be moved. Perhaps the person registered for the wrong instance of the event, or maybe they just changed their mind. Don't worry, moving a registration is easy! However, you can only move the registration to an instance that uses the same

registration template (moving them across different templates would be rather difficult as there would be different fields, costs, fees and discounts.) This button allows you to complete the move of the registration.

6 Add New Registrant

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

Registrants Tab

The next tab shows a listing of all registrants for the event, including summary information about groups, fees and placements. This list is also filterable. Clicking a row will show you the registrant's details as well as the rest of the related registration information. If 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.

The screenshot shows the 'Registration Instance Registrants' page. At the top, there's a header with the title 'Registration Instance Registrants' and a navigation bar with a search field and user profile. Below the header, there's a breadcrumb trail: Home > Event Registration > Summer Camp 2022. The main content area has tabs for 'Registrants' (which is active), 'Registrations', 'Payments', 'Fees', 'Discounts', and 'Linkages'. The 'Registrants' tab displays a table with columns for Name, Account, Maximum Attendees, Registration Starts, and Registration Ends. A row for 'Summer Camp 2021' is selected, showing details like Name: Summer Camp 2021, Account: Event Registration, Maximum Attendees: 200, Registration Starts: 5/1/2021, and Registration Ends: 8/1/2021. Below the table are 'Edit' and 'Delete' buttons. At the bottom of the page, there's a footer with 'Crafted by Spark Development Network / License' and various icons.

As of Rock v13.2 you may notice a icon at the top and bottom of the list of registrants, in addition to the other grid actions. Clicking this will start a new communication, sent to the registrar of any selected registrants. This allows you to filter the list of registrants and then easily contact the associated registrars.

Payments Tab

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

The screenshot shows the 'Registration Payments' interface. At the top, there's a navigation bar with a logo, search, and user profile. Below it, a sidebar has icons for Home, Registrants, Payments (which is selected), Fees, Discounts, and Linkages. The main content area is titled 'Payments' under 'Summer Camp 2021'. It displays registration details: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). Below this is a 'Payments' section with a table showing a single payment record:

Person	Date / Time	Amount	Payment Method	Account	Transaction Code	Registrar	Registrant(s)
Decker, Ted	7/22/2021 6:43:47 PM	\$210.00	Credit Card	*****4444	T20210928184347171	Ted Decker	Alex Decker

At the bottom, there are links for 'Edit' and 'Delete', and a footer note about the software being crafted by 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 Fees

The screenshot shows the 'Fees' tab in the 'Summer Camp 2021' registration instance. The top navigation bar includes links for Home, Event Registration, and Summer Camp 2021. The left sidebar has icons for Home, People, Events, and Tools. The main content area displays basic camp details: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). Below these are 'Edit' and 'Delete' buttons. A tabs menu at the bottom includes Registrations, Registrants, Payments, Fees (which is selected), Discounts, and Linkages. The 'Fees' section shows a table with one row of data: Registration Date (7/22/2021), Registered By (Ted Decker), Registrant (Alex Decker), Fee Name (Camp Shirt), Option (Small), Quantity (1), Cost (\$10.00), and Fee Total (\$10.00). Filter options and export icons are also present.

Registration Date	Registered By	Registrant	Fee Name	Option	Quantity	Cost	Fee Total
7/22/2021	Ted Decker	Alex Decker	Camp Shirt	Small	1	\$10.00	\$10.00

Discounts Tab

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

Registration Instance Discounts

The screenshot shows the 'Discounts' tab for a registration instance named 'Summer Camp 2021'. The main panel displays the registration details: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). Below these details are 'Edit' and 'Delete' buttons. The 'Discounts' tab is selected, showing a table of discounts applied to the registration. One discount is listed: Registered By (Ted Decker), Registration Date (7/22/2021), Registrant Count (1), Discount Code (STAFF), Discount (50.00%), Total Cost (\$210.00), Discount Qualified Cost (\$200.00), Total Discount (\$100.00), and Registration Cost (\$110.00). The table includes filters for 50, 500, and 5,000. A 'Total Results' summary table at the bottom right provides a quick overview of the registration costs.

Registered By	Registration Date	Registrant Count	Discount Code	Discount	Total Cost	Discount Qualified Cost	Total Discount	Registration Cost
Ted Decker	7/22/2021	1	STAFF	50.00%	\$210.00	\$200.00	\$100.00	\$110.00

Total Results	
Total Cost	\$210.00
Discount Qualified Cost	\$200.00
Total Discount	\$100.00
Registration Cost	\$110.00
Total Registrations	1
Total Registrants	1

Linkages Tab

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

Registration Instance Linkages

The screenshot shows a software interface for managing registration instances. At the top, there's a navigation bar with icons for Home, Event Registration, and Summer Camp 2021. Below the navigation is a toolbar with icons for Summer Camp, Summer Camp 2021, Registration, and Registrant. A sidebar on the left contains icons for List, Person, Calendar, Settings, and Briefcase.

The main content area displays a registration instance named "Summer Camp 2021". It includes fields for Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). There are "Edit" and "Delete" buttons at the bottom of this section.

Below this, a tab labeled "Linkages" is selected. It shows a table of linkages:

Calendar Item	Campus	Group	Content Item	Public Name	URL Slug
Camp 2021 (Public)	All Campuses			Summer Camp 2021	summercamp

At the bottom of the interface, there are pagination controls (50, 500, 5,000) and a note: "Crafted by Spark Development Network / License".

Wait List Tab

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

Registration Instance Waitlist

The screenshot shows a software interface for managing a registration instance. The top navigation bar includes a logo, a search bar, and a user profile. On the left, a vertical sidebar features icons for Home, Event Registration, Registrants, Payments, Fees, Discounts, Linkages, and Wait List, with the Wait List icon being highlighted. The main content area has a title 'Wait List' and a breadcrumb trail: Home > Event Registration > Summer Camp 2021. Below this, there are four tabs: 'Summer Camp' (highlighted), 'Summer Camp 2021' (selected), 'Registration', and 'Registrant'. The 'Summer Camp 2021' section displays details: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). Buttons for 'Edit' and 'Delete' are present. Below these tabs is a 'Wait List' tab, which is also highlighted. The 'Wait List' section contains a table with one row: ID (1), Wait List Individual (Decker, Noah), and Added Datetime (7/22/2021 5:06:28 PM). A 'Move From Wait List' button is at the bottom. At the very bottom of the page, a footer note reads 'Crafted by Spark Development Network / License'.

Group Placement Tabs

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

Registration Group Placement

The screenshot shows the 'Placement Groups' section of the application. At the top, there's a navigation bar with icons for Home, Event Registration, and Summer Camp 2021. Below the navigation is a breadcrumb trail: Home > Event Registration > Summer Camp 2021. The main content area has tabs for Summer Camp, Summer Camp 2021, Registration, and Registrant. The 'Summer Camp 2021' tab is active, showing details for the camp: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). There are 'Edit' and 'Delete' buttons at the bottom of this section. Below this are tabs for Registrations, Registrants, Payments, Fees, Discounts, Linkages, **Busses**, Cabins, and Activities. The 'Busses' tab is selected, displaying two groups: 'Bus 1' and 'Bus 2'. Each bus has a 'Members' section listing attendees: Bus 1 has Noah Decker and Alex Decker, and Bus 2 has Jordan Greggs. On the left side, there's a vertical sidebar with icons for Home, Registrants, Payments, Fees, Discounts, Linkages, Cabins, Activities, and a gear icon for settings.

Placement Groups

Home > Event Registration > Summer Camp 2021

Summer Camp **Summer Camp 2021** Registration Registrant

Summer Camp 2021

Name: Summer Camp 2021 Account: Event Registration

Maximum Attendees: 200

Registration Starts: 5/1/2021 Registration Ends: 8/1/2021

Edit **Delete**

Registrations Registrants Payments Fees Discounts Linkages **Busses** Cabins Activities

Groups

Registrants

Search: Brian Jones Maddie Lowe

Bus 1

Members: Noah Decker Alex Decker

Bus 2

Members: Jordan Greggs

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Wait Lists

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

Registration Entry

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

The screenshot shows a web page titled 'Wait List Warning' for a 'Summer Camp' registration. At the top, there is a navigation bar with links for 'New Here?', 'Resources', 'Connect', 'Give', 'Blog', 'Calendar', 'Watch', and 'Hello Alisha'. Below the navigation bar, the main content area has a title 'Summer Camp' and a breadcrumb trail 'Home / Calendar / Summer Camp'. A yellow warning box displays the message 'Registration Full' followed by the subtext 'This Registration has reached its capacity. Complete the registration below to be added to the waitlist.' Below the warning box, a question 'How many registrants will you be registering?' is displayed, accompanied by a numeric input field set to '1' with a minus sign, plus sign, and a 'Next' button. At the bottom of the page, there is a footer note 'Powered by: Rock RMS' and an address '3120 W Cholla St Phoenix, AZ 85029'.

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)

The screenshot shows a church website interface. At the top, there is a navigation bar with links: New Here?, Resources, Connect, Give, Blog, Calendar, Watch, and Hello Alisha. Below the navigation bar, the page title is "Summer Camp". Underneath the title, there is a breadcrumb trail: Home / Calendar / Summer Camp. A yellow callout box at the top right of the main content area states "Registration Full" and "This registration only has capacity for 1 more registrant. The first registrant you add will be registered for Summer Camp. The remaining registrant will be added to the waitlist." In the center, the question "How many registrants will you be registering?" is displayed above a numeric input field containing the number "2". To the left of the input field are minus and plus buttons, and to the right is a blue "Next" button. At the bottom left of the page, it says "Powered by: Rock RMS". At the bottom right, the address "3120 W Cholla St Phoenix, AZ 85029" is listed.

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

The screenshot shows a registration form for 'Summer Camp'. At the top, there's a navigation bar with links for 'New Here?', 'Resources', 'Connect', 'Give', 'Blog', 'Calendar', 'Watch', and a 'Hello Alisha' dropdown. Below the navigation, the page title is 'Summer Camp' with a breadcrumb trail: 'Home / Calendar / Summer Camp'. The main section is titled 'First Registrant' with a note: 'This registrant will be fully registered.' A progress bar indicates the form is about halfway completed. A question 'Jen is in the same immediate family as' has two options: 'Alisha Marble' (radio button) and 'None of the above' (radio button, selected). The form fields include: 'First Name' (Jen), 'Last Name' (Fish), 'Birthday' (Apr 16, 2012), 'Gender' (Female), 'Leader Preference' (Cindy Decker), 'Cabin Preference' (Eagle), and 'Additional Options' (Camp Shirt dropdown menu). Navigation buttons 'Previous' and 'Next' are at the bottom, along with a note that the form is powered by Rock RMS.

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

Group Member Entry Fields

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

Wait List Screen

The screenshot shows a web page for "Summer Camp" under the "Calendar" section. The top navigation bar includes links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and a personalized greeting "Hello Alisha".

The main content area has a yellow header bar stating "This registrant will be on the waiting list". Below this is a question: "Lynn is in the same immediate family as *". Two options are shown: "Jen Fish" (radio button) and "None of the above" (radio button, selected). The "None of the above" option is highlighted with a blue border.

Form fields for "First Name *" and "Last Name *" are present, both containing the value "Lynn" and "Sykes" respectively. Navigation buttons "Previous" and "Next" are at the bottom right.

Page footer information 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.

Wait List Payment

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

Summer Camp

Home / Calendar / Summer Camp

Review Registration

This Registration Was Completed By

First Name [*]	Last Name [*]
Alisha	Marble
Send Confirmation Emails To [*]	
<input type="text"/> alisha@rocksolidchurchdemo.com	
<input checked="" type="checkbox"/> Should Your Account Be Updated To Use This Email Address?	

Alisha is in the same immediate family as ^{*}

Jen Fish Lynn Sykes None

Payment Summary

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

Total Cost
\$200.00

Minimum Due Today
\$0.00

Amount To Pay Today ^{*}
 \$ 200.00

Amount Remaining After Payment
\$0.00

Discount Code

Payment Method

Card Number

VISA

Expiration Date /

Card Security Code

Billing Address

Address

City AZ Zip

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

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

The screenshot shows a confirmation page for a summer camp registration. At the top, there's a navigation bar with links for New Here?, Resources, Connect, Give, Blog, Calendar, Watch, and a personalized greeting "Hello Alisha". The main content area has a title "Summer Camp" and a breadcrumb trail "Home / Calendar / Summer Camp". A large, bold heading says "Congratulations Alisha". Below this, a message states: "You have successfully registered the following registrant for Summer Camp:" followed by a bullet point: "• Jen Fish - \$200.00". Another message follows: "You have successfully added the following registrant to the waiting list for Summer Camp:" followed by a bullet point: "• Lynn Sykes". Below these messages, it says "Total Cost: \$200.00", "Paid \$200.00 on 2/14/2022 (Acct #: *****4444, Ref #: T20220214164533507)", and "Balance Due: \$0.00". A note at the bottom says "A confirmation email has been sent to alisha@rocksolidchurchdemo.com. If you have any questions please contact Jenny Michaels at jenny@rocksolidchurchdemo.com." There are two buttons at the bottom left: "Make Payments Even Easier" and an unchecked checkbox for "Save account information for future transactions". The footer includes a "Powered by: Rock RMS" logo and the address "3120 W Cholla St Phoenix, AZ 85029".



Registration Confirmation: Summer Camp

The following registrant has been registered for Summer Camp:

- **Jen Fish** - \$200.00

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

- **Lynn Sykes**

Total Cost: \$200.00

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

Balance Due: \$0.00

Looking forward to seeing you at camp this year!

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

Contact Info:

3120 W Cholla St Phoenix, AZ 85029

Phone:

Email: info@organizationname.com

Website: www.organization.com

Wait List Administration

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

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

Registration List

The screenshot shows the 'Registrations' page for 'Summer Camp 2021'. The top navigation bar includes a logo, search, and user profile. Below the header, tabs for 'Summer Camp', 'Summer Camp 2021' (selected), 'Registration', and 'Registrant' are visible. A summary box displays the camp name, maximum attendees (200), registration start date (5/1/2021), and end date (8/1/2021). Buttons for 'Edit' and 'Delete' are present, along with a 'Send Payment Reminders' link. Below this is a 'Registrations' tab and a grid table with columns: Registered By, Registrants, When, Total Cost, and Balance Due. The grid lists three registrants: Gregg's, Bob (Tim Gregg's WL), Jackson, Mariah (Maddie Lowe), and George Lareian (Jordan George).

Registered By	Registrants	When	Total Cost	Balance Due
<input type="checkbox"/> Gregg's, Bob	Tim Gregg's WL	7/28/2021 7:55 PM	\$0.00	\$0.00
<input type="checkbox"/> Jackson, Mariah	Maddie Lowe	7/25/2021 7:48 PM	\$200.00	\$200.00
<input type="checkbox"/> George Lareian	Jordan George	7/28/2021 7:19 PM	\$200.00	\$200.00

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

Wait List Tab

The screenshot shows the 'Wait List' tab for 'Summer Camp 2021'. The top navigation bar includes a logo, search, name dropdown, and user profile. The left sidebar has icons for Home, Event Registration, Registrants, Payments, Fees, Discounts, Linkages, and Wait List. The main content area displays the event details: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). Below these are 'Edit' and 'Delete' buttons. A navigation bar at the bottom includes 'Registrations', 'Registrants', 'Payments', 'Fees', 'Discounts', 'Linkages', and 'Wait List' (which is underlined). The 'Wait List' section shows a table with one item: '1' (Greggs, Tim) added on 7/28/2021 at 7:56:36 PM. There are filter options and move buttons.

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.

The screenshot shows the 'Wait List Confirmation' screen. The top navigation bar includes a logo, search, name dropdown, and user profile. The left sidebar has icons for Home, Event Registration, Registrants, Payments, Fees, Discounts, Linkages, and Wait List. The main content area displays a confirmation message: 'Wait List Updated 1 individual was moved from the wait list.' There is a checkbox for 'Send email to individuals'.

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

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

The screenshot shows the 'Wait List Move Email' screen in the Lava software interface. The top navigation bar is orange with the title 'Wait List Move Email'. On the left, there is a vertical sidebar with icons for Home, Event Registration, Wait List Confirmation, Registrants, Registrants List, and Registrant Details. The main content area has a header 'Wait List Confirmation' with a breadcrumb trail: Home > Event Registration > Wait List Confirmation. Below this is a message box stating 'Wait List Updated 1 individual was moved from the wait list.' A checked checkbox 'Send email to individuals' is present. The 'Recipients' section shows one recipient: 'Bob Greggs (greggs@fakeinbox.com)' with 'Registrants: Tim Greggs'. The 'From Name' field is set to 'Jenny Michaels' and the 'From Email' field is 'jenny@rocksolidchurchdemo.com'. The 'Subject' field is 'Summer Camp Wait List Update'. The message body contains a logo for 'ROCK' and the heading 'Summer Camp Wait List Update'. It informs Bob that Tim Greggs has been moved from the waitlist to a full registrant. It also mentions a balance of \$100.00 remains on the registration and provides a link for online registration. Contact info for Jenny is listed as '3120 W Cholla St Phoenix, AZ 85029'. At the bottom is a 'Send' button.

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

Registration Payment Reminders

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

Manual Reminders

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

The screenshot shows a software interface titled "Send Payment Reminders". At the top, there is a navigation bar with icons for Home, Event Registration, and Summer Camp 2021. Below the navigation bar, the main title is "Registrations" under "Summer Camp 2021". The registration details shown are: Name (Summer Camp 2021), Account (Event Registration), Maximum Attendees (200), Registration Starts (5/1/2021), and Registration Ends (8/1/2021). There are "Edit" and "Delete" buttons at the bottom of this section. To the right, there is a "Send Payment Reminders" button with a star icon. Below this, there are tabs for "Registrations", "Registers", "Payments", "Fees", "Discounts", and "Linkages". The "Registrations" tab is selected, showing a table of registrants:

Registered By	Registrants	When	Total Cost	Balance Due
Greggs, Bob	Tim Greggs	9/28/2021 7:55 PM	\$210.00	\$210.00
Jackson, Mariah	Maddie Lowe	9/28/2021 7:48 PM	\$200.00	\$200.00
Greens, Lorraine	Jordan Greens	9/28/2021 7:48 PM	\$200.00	\$200.00

Once you click the **Send Payment Reminders** link you'll see the page below. This page allows you to customize the reminder text and who should receive the email.

Payment Reminder Communication

The screenshot shows the 'Payment Reminders' section of a software interface. On the left, a vertical sidebar contains icons for Home, Event Registration, Summer Camp 2021, and Payment Reminders. The main area has a header 'Send Payment Reminders' with tabs for 'Source' and 'Preview'. The 'Source' tab is active.

1 From Name *: Jenny Michaels

From Email *: jenny@rocksolidchurchdemo.com

Subject *: Summer Camp 2021 Payment Reminder

Message: A preview of the email message:

2

Registration Payment Reminder

This registration for Summer Camp 2021 has a remaining balance of \$220.00. 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: 2420 W Cholla St Phoenix AZ 85009

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

<input type="checkbox"/>	Name	Date Registered	Email	Last Reminder Sent	Cost	Amount Paid	Balance Due
<input checked="" type="checkbox"/>	Decker, Ted	7/28/2021	ted@rocksolidchurchdemo.com	Today	\$420.00	\$0.00	\$220.00
<input checked="" type="checkbox"/>	Jones, Ben	7/26/2021	ben.jones@fakeinbox.com	Today	\$200.00	\$0.00	\$200.00
<input checked="" type="checkbox"/>	Greggs, Lorraine	7/25/2021	lgreggs@fakeinbox.com	Today	\$200.00	\$0.00	\$200.00
<input checked="" type="checkbox"/>	Jackson, Mariah	7/23/2021	mariyah.jackson@fakeinbox.com	Today	\$200.00	\$0.00	\$200.00

4 Send Reminders **5**

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1 From Name

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

2 Message

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

3 Template Toggle

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

4 People

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

5 Button

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

Automatic Reminders

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

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

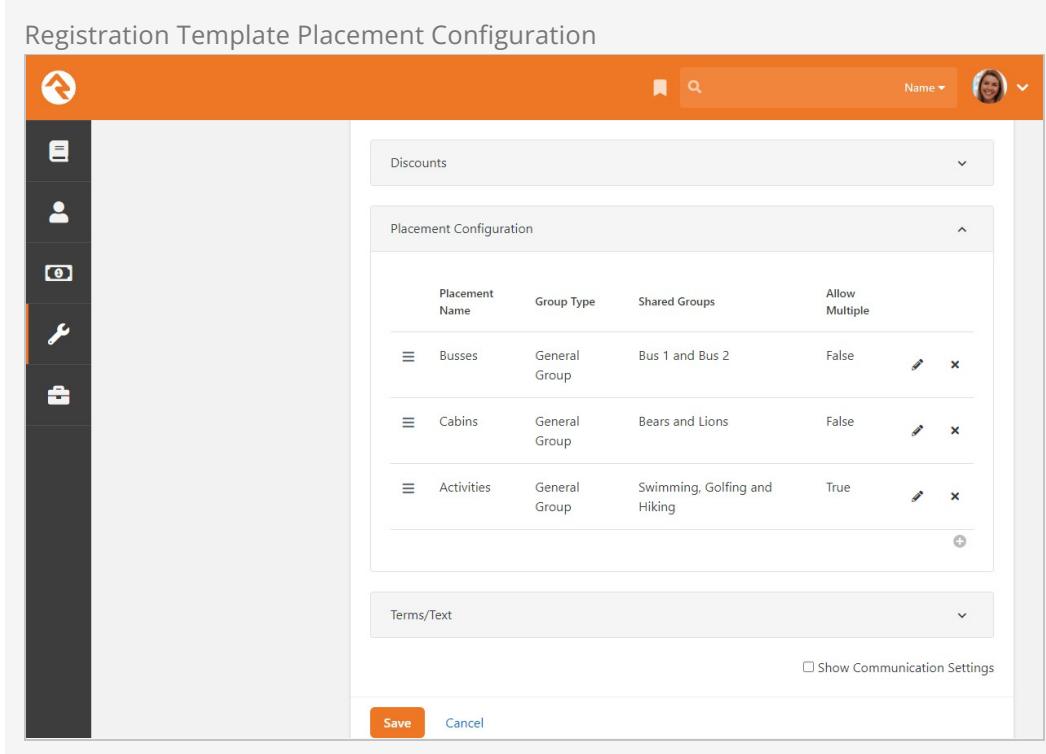
Registration Group Placements

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

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

Placement Configuration

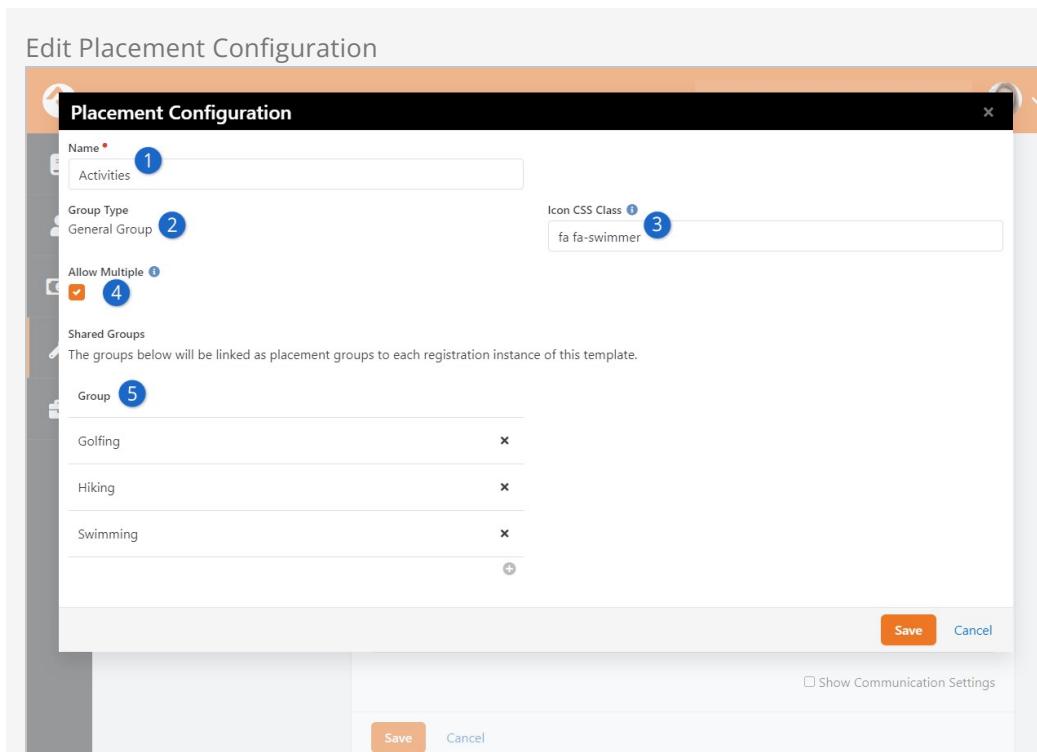
Registration templates have a panel called *Placement Configuration* where you can define areas into which registrants should be sorted. Ultimately this will mean placing registrants into groups, but those groups can be created and added later in the process. For now, let's look at the *Placement Configuration*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



The screenshot shows the 'Registration Template Placement Configuration' screen. On the left is a vertical toolbar with icons for Home, Registrants, Discounts, and Tools. The main area has a header 'Placement Configuration'. Below it is a table with columns: Placement Name, Group Type, Shared Groups, and Allow Multiple. Three rows are listed: 'Busses' (General Group, Bus 1 and Bus 2, False), 'Cabins' (General Group, Bears and Lions, False), and 'Activities' (General Group, Swimming, Golfing and Hiking, True). A '+' button is at the bottom right of the table. At the bottom are 'Save' and 'Cancel' buttons, and a checkbox for 'Show Communication Settings'.

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

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



1 Name

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

2 Group Type

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

3 Icon CSS Class

You can optionally set an icon for the placement.

4 Allow Multiple

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

5 Shared Groups

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

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

The screenshot shows the 'Registration Instance Group Placement' page. At the top, it displays 'Registration Starts' (5/1/2021) and 'Registration Ends' (8/1/2021). Below this are buttons for 'Edit' and 'Delete'. A navigation bar includes 'Registrations', 'Registrants', 'Payments', 'Fees', 'Discounts', 'Linkages', 'Busses', '1 Cabins', and 'Activities' (which is underlined). A 'Groups' section lists four groups: 'Registrants' (4), 'Archery' (5), 'Golfing' (6), and 'Hiking'. The 'Archery' group is highlighted with a blue border. The 'Archery' group has a 'Summer Camp 2021' label. The 'Members' section for Archery lists registrants: Brian Jones, Maddie Lowe, Tim Greggs, Alex Decker, Noah Decker, Jordan Greggs, Tim Greggs, Brian Jones, and Maddie Lowe. The 'Golfing' group has a 'Shared' label and lists registrants: Alex Decker, Brian Jones, Maddie Lowe, Tim Greggs, and Jordan Greggs. The 'Hiking' group has a 'Shared' label and lists registrants: Noah Decker, Brian Jones, and Jordan Greggs. The 'Swimming' group has a 'Shared' label and lists registrant: Noah Decker. At the bottom left, it says 'Crafted by Spark Development Network / License'.

1 Placements

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

2 Add Group

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

3 Placement Configuration

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

4 Registrants

A searchable list of registrants lets you easily drag and drop individuals into the group placements on the right. If applicable, you can update the configuration (from the  icon) to display registrant attribute values such as "Cabin Preference".

5 Placement Groups

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

6 Labels

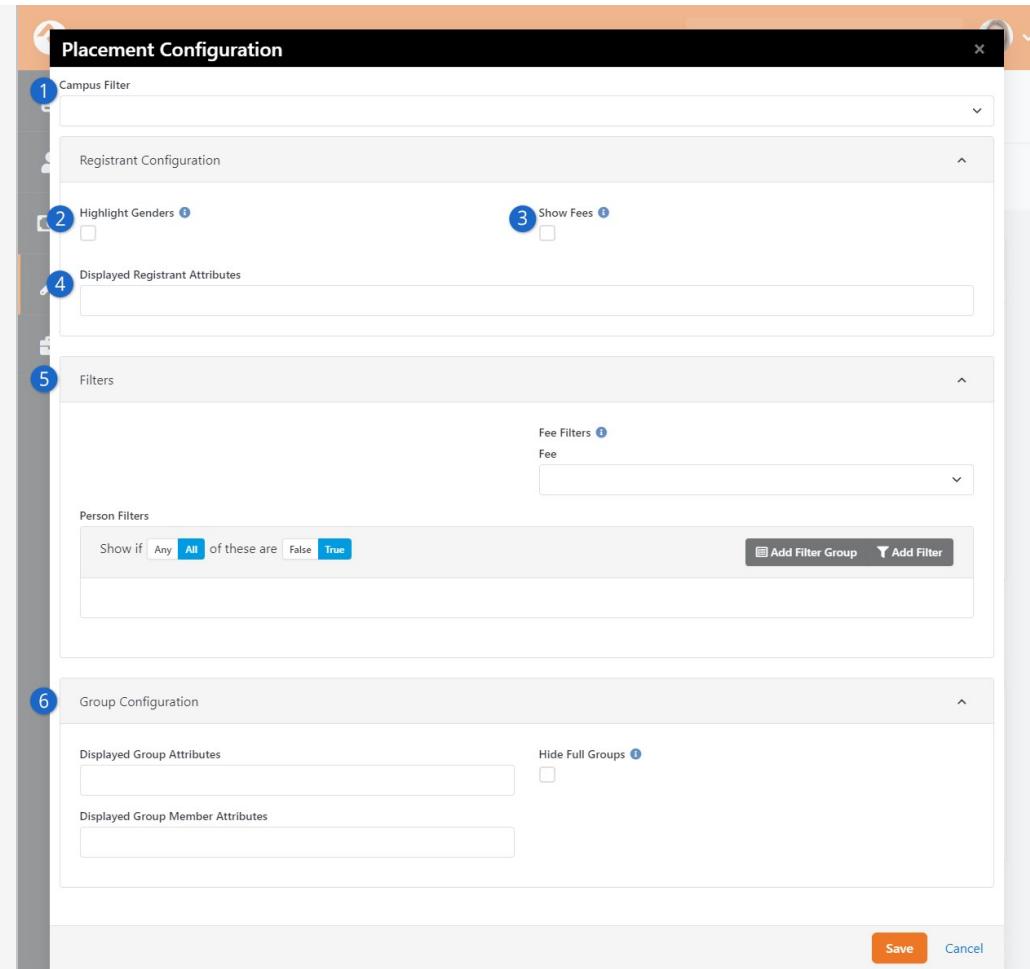
Placement groups that have been added to the registration template will appear with a "Shared" label. This is a handy reminder that the group is shared across registration instances. You can also use the [Add Group](#) button to add groups to this instance only, which assigns a label based on the instance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

7 Capacity Count

If a group has a capacity, then this label will appear and will be updated automatically as registrants are placed. In the example pictured above, "Swimming" has a limit of two registrants (it's a very small pool) with one space already taken by Noah Decker's placement.

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

[Edit Instance Placement Configuration](#)



1 Campus Filter

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

2 Highlight Genders

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

3 Show Fees

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

4 Displayed Registrant Attributes

Choose which attributes should be displayed for each registrant on the placement screen. This makes it easy to place camp registrants into their desired locations.

5 Filters

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

6 Group Configuration

You can choose to display Group and/or Group Member attributes if any

are configured. You can also choose to *Hide Full Groups* if you don't want to display groups that have reached capacity.

Registration Template Placement Page

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

The screenshot shows the 'Registration Template Placement' page. On the left, there's a vertical sidebar with icons for Home, Groups, Cabins, Activities, and a gear. The 'Groups' icon is highlighted with an orange bar. The main content area has a header 'Registration Template Placement' and a breadcrumb 'Home > Summer Camp > Registration Template Placement'. Below the header, there are three tabs: 'Busses', 'Cabins' (which is selected), and 'Activities'. Under the 'Groups' section, there are two groups: 'Bears' and 'Lions'. Each group has a 'Members' section. In the 'Bears' group, there is one member: 'Alex Decker'. In the 'Lions' group, there is one member: 'Noah Decker'. There are also 'Shared' and 'Edit' buttons for each group.

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

Access Registration Template Placement Page

The screenshot shows a software interface for event registration. At the top, there's a navigation bar with a logo, search bar, and user profile. Below it, a sidebar on the left contains icons for document, person, gear, and briefcase, with 'Registration Template' selected. The main content area has tabs for 'Summer Camp' (selected), 'Instance', 'Registration', and 'Registrant'. On the left, under 'Registration Template', there's a tree view with 'Connection' and 'General' expanded, showing 'Summer Camp' selected. The right side displays a detailed view of the 'Summer Camp' registration template. It includes fields for 'Group Type' (General Group), 'Cost' (\$200.00), 'Registrant Forms (1)', 'Minimum Initial Payment' (\$0.00), 'Fees' (Camp Shirt: Small- \$10.00, Medium- \$10.00, Large- \$10.00, X-Large- \$10.00), and a 'Description' section. At the bottom are 'Edit' and 'Delete' buttons, and a toolbar with icons for copy, paste, and lock.

Registration Finances

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

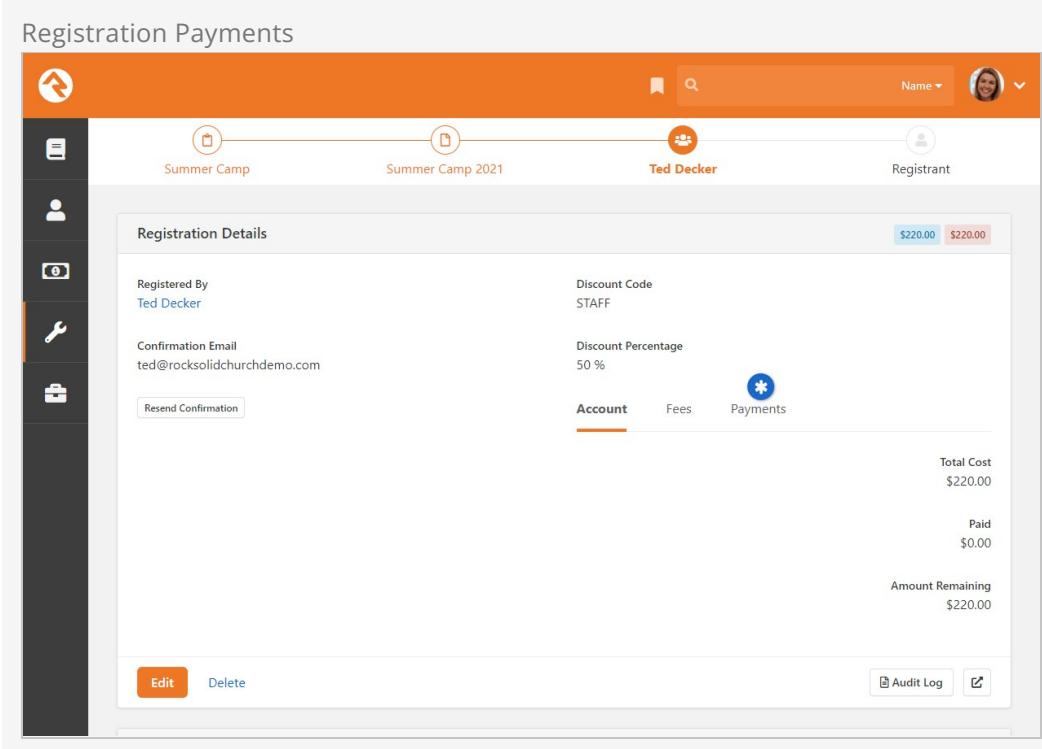
Adding Payments

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

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

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

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



The screenshot shows the 'Registration Payments' page. At the top, there's a navigation bar with icons for Home, Search, and User profile. Below the navigation is a secondary header with 'Summer Camp', 'Summer Camp 2021', 'Ted Decker', and 'Registrant'. On the left, a vertical sidebar has icons for Home, People, Events, Tools (which is selected), and Forms. The main content area is titled 'Registration Details'. It shows 'Registered By' as 'Ted Decker', 'Confirmation Email' as 'ted@rocksolidchurchdemo.com', and a 'Resend Confirmation' button. To the right, it shows a 'Discount Code' of 'STAFF', a 'Discount Percentage' of '50 %', and tabs for 'Account', 'Fees', and 'Payments' (which is selected). Below these, it lists 'Total Cost' as '\$220.00', 'Paid' as '\$0.00', and 'Amount Remaining' as '\$220.00'. At the bottom are 'Edit' and 'Delete' buttons, and links for 'Audit Log' and a 'Print' icon.

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

The screenshot shows the 'Payments Edit Panel' interface. On the left is a vertical sidebar with icons for Home, Registrations, Guests, Reports, Tools, and Help. The main area has a header with a logo, search, and user info. A top bar shows registration details: Registered By (Ted Decker), Confirmation Email (ted@rocksolidchurchdemo.com), Discount Code (STAFF), and Discount Percentage (50 %). Below this is a navigation bar with tabs: Account, Fees, and Payments (which is selected). The Payments tab displays a table of payments with columns for Date / Time, Details, and Amount. One entry is shown: 7/22/2021 10:13 AM, Decker, Theodore, Credit Card, ****4444, T20210928221357749, \$200.00. At the bottom are buttons for Process New Payment (callout 2), Add Manual Payment (callout 3), and Audit Log.

1 Payment Detail

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

2 Process New Payment

Selecting this option allows you to run a new credit card payment through Rock.

3 Add Manual Payment

This optional allows you to enter the details of a manual (off-line) payment, like cash or check.

Refunds

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

Financial Transaction Detail

The screenshot shows the 'Financial Transaction Detail' page. At the top, there's a header bar with a logo, search, and user profile. A vertical sidebar on the left contains icons for Home, Transactions, Transaction Detail, Person, and others. The main content area has a title 'Transaction Detail' and a breadcrumb 'Home > Transactions > Transaction Detail'. Below this is a 'Financial Transaction' section with tabs for 'Batch #283' and 'Event Registration'. The 'Authorized By' section shows a person named Ted Decker with a home address in Phoenix, AZ. The 'Transaction Details' table includes columns for Accounts, Amount, and lists items like 'Event Registration' for \$200.00. The 'Payment Gateway' section shows 'Test Gateway'. The 'Registration' section lists 'Summer Camp - Summer Camp 2021'. The 'Updates' section shows the transaction was created by Alisha Marble on 7/22/2021 at 10:13 AM. The 'Edit' button is in the bottom left of the main content area. To the right, there's a 'Refund' button with a blue asterisk icon. The 'Transaction History' section at the bottom shows two entries: one for Alisha Marble adding an event registration and another for her adding the transaction itself, both occurring 5 minutes ago.

Date Created:	7/22/2021			
Category	Who	Did	What	When
Transaction	Alisha Marble	Added Event Registration [4]	value of \$200.00.	5 Minutes Ago
Transaction	Alisha Marble	Added Transaction		5 Minutes Ago

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

Payments Edit Panel

The screenshot shows a modal window titled "Refund". It has four numbered callout points: 1) "Amount" pointing to a text input field containing "\$ 200.00"; 2) "Reason" pointing to a dropdown menu; 3) "Summary" pointing to a text area; 4) "Process refund through financial gateway" pointing to a checked checkbox. At the bottom right are "Save" and "Cancel" buttons.

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 (checked) or just entered into Rock (unchecked).

Partial Payments

Partial payments are a popular feature for events with higher costs, like camps. The age old' 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, located under the Assessments list along the right of the page, shows any recent registrations and notes if a payment is due. Clicking the link will take them to a page where they can complete the payment or apply a discount code.

Recent Registration Block

The screenshot shows the 'My Account' page of the Rock Solid Church Demo website. At the top, there's a navigation bar with links like 'New Here?', 'Resources', 'Connect', 'Give', 'Blog', 'Calendar', 'Watch', and 'Hello Ted'. Below the navigation is a sidebar with sections for 'Account Info', 'Change Password', 'Groups', 'Ushers (Member)', 'Decker Group (Leader *)', 'Schedule Toolbox', and 'Assessments' (with options for DISC, Spiritual Gifts, Conflict Profile, Emotional Intelligence, and Motivators). The main content area displays 'Contact Information' for 'Ted Decker' (40 years old, Male, Married 19 yrs) and his 'Decker Family' members: 'Cindy Decker' (39 yrs old, Female), 'Noah Decker' (18 yrs old, 7th Grade), and 'Alex Decker' (9 yrs old, 4th Grade). Each family member has a profile picture, basic info, and a 'Contact Info' link. At the bottom of the page are buttons for 'Add New Family Member' and 'Request Additional Changes', and a note that it's powered by Rock RMS.

Post-Registration Discount Codes

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

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

Review Registration Page

The screenshot shows the 'Review Registration' page from the Rock Solid Church Demo website. At the top, there's a navigation bar with links like 'New Here?', 'Resources', 'Connect', 'Give', 'Blog', 'Calendar', 'Watch', and 'Hello Ted'. Below the navigation, the main content area has a title 'Registration' and a breadcrumb trail 'Home / Calendar / Registration'. A large blue header bar says 'Review Registration'. The page is divided into several sections:

- This Registration Was Completed By**: Fields for First Name (Ted) and Last Name (Decker).
 - Send Confirmation Emails To**: Email input (ted@rocksolidchurchdemo.com) and a checkbox for updating the account.
 - Ted is in the same immediate family as**: Radio buttons for 'Noah Decker' (selected) and 'None'.
- Payment Summary**:

Description	Amount
Noah Decker	\$ 200.00
Camp Shirt-X-Large (1 @ \$10.00)	\$ 10.00
Total	\$ 210.00
Total Cost	\$110.00
Previously Paid	\$50.00
Minimum Due Today	\$0.00
Amount To Pay Today	\$ 0.00
Amount Remaining	\$60.00
- Payment Method**: Fields for Card Number, expiration date (dropdown menus), card security code (input field), and logos for VISA, MasterCard, American Express, and Discover.
- Buttons**: 'Previous' (gray), 'Finish' (blue), and 'Apply' (gray).
- Powered by**: Rock RMS
- Address**: 3120 W Cholla St Phoenix, AZ 85029

1 Discount Code

Individuals enter a discount code here to apply the discount toward their remaining balance.

2 Apply

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

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

additional discount code.

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

Event Registration Matching

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

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

The screenshot shows the 'Event Registration Matching' page. At the top, there's a search bar and a user profile. On the left, a sidebar has icons for Home, Events, People, Checks, and Reports. The main area has a title 'Event Registration Matching' and a breadcrumb 'Home > Event Registration Matching'. There are three numbered callouts: 1 points to the 'Open Batches' dropdown containing '#283 Financial Batch 01000111-0110111X.', 2 points to the 'Registration Template' dropdown showing 'Summer Camp', and 3 points to the 'Registration Instance' dropdown showing 'Summer Camp 2021'. Callout 4 points to a checked checkbox 'Hide Fully Paid Registrations'. Below these are two rows of transaction details:

Person	Transaction Info	Check Image	Matched Registration
Ted Decker	\$100.00 Event Registration		Cindy Decker 2/9/2021 Noah Decker 5
Ben Jones	\$100.00 Event Registration		Registration 6

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

1 Open Batches

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

2 Registration Template

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

3 Registration Instance

Event Registration Matching works with a single registration instance at a

time. The registration instance is used to identify the registrations that you'll be matching payments to.

4 Hide Fully Paid Registrations

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

5 Matched Registration

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

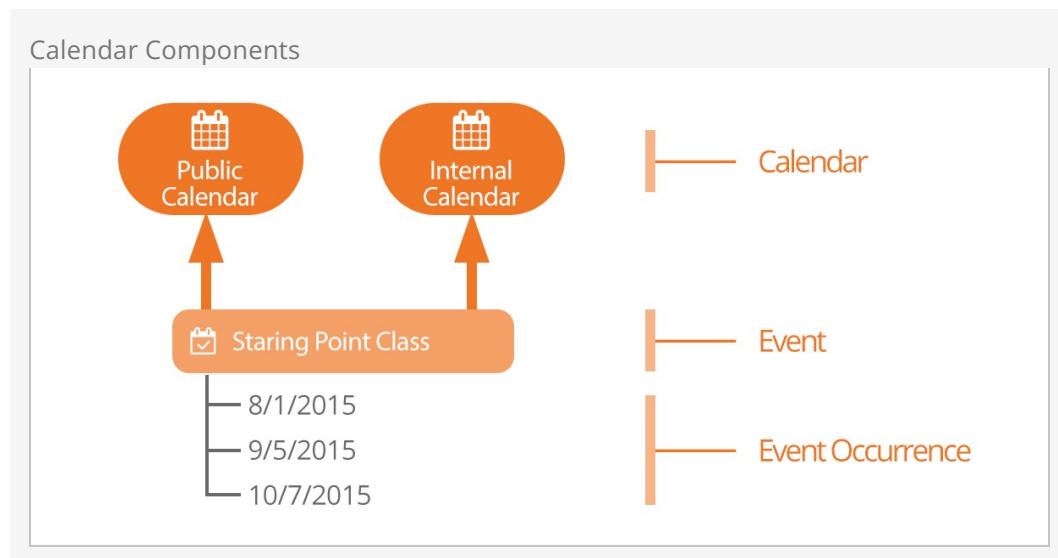
6 Select Registration

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

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

Calendars

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



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

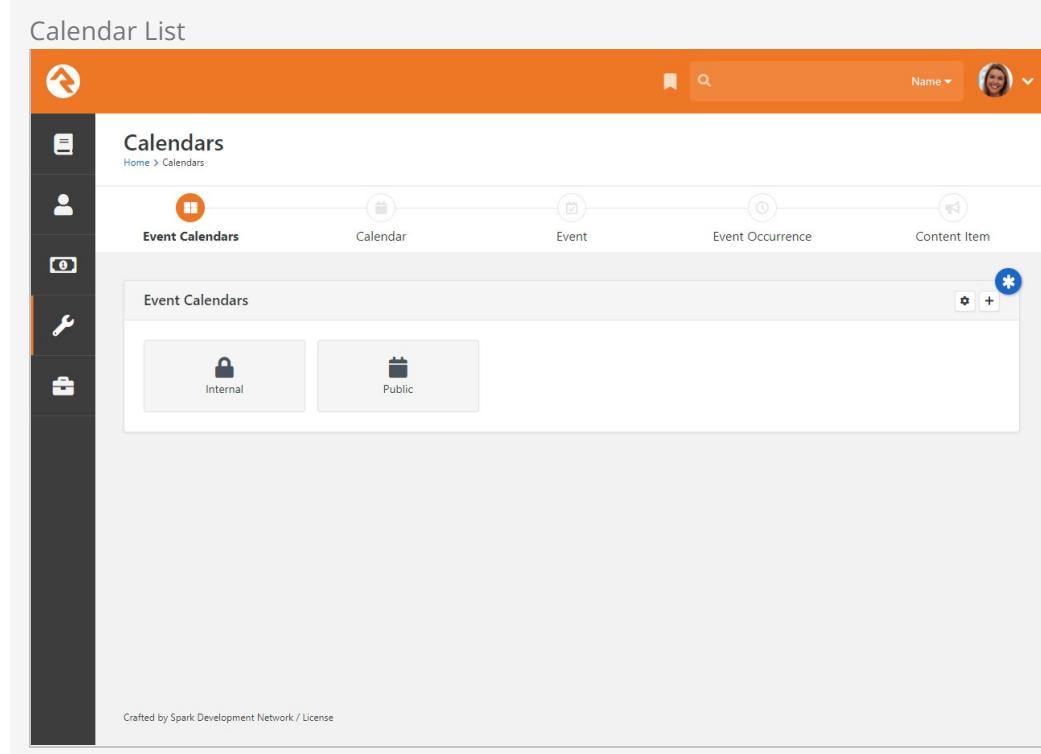
Every organization has the need for multiple calendars. Even a small organization will have a public and private (internal) calendar. Most will have several more. You can administrate calendars under [Tools > Calendars](#).

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.



The screenshot shows the 'Calendars' section of the Rock CMS. The top navigation bar is orange with the Rock logo, search, and user profile icons. On the left is a dark sidebar with icons for Home, Calendars, Events, Content, and System. The main area has a header 'Event Calendars' with sub-options: 'Calendar', 'Event', 'Event Occurrence', and 'Content Item'. Below this is a section titled 'Event Calendars' containing two buttons: 'Internal' (with a lock icon) and 'Public' (with a calendar icon). A blue asterisk icon is in the top right corner of this section. At the bottom of the page is a small footer note: 'Crafted by Spark Development Network / License'.

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

Calendar Details

The screenshot shows the 'Event Calendar' configuration page. At the top, there's a navigation bar with icons for Home, Calendars, Public, Event, Event Occurrence, and Content Item. Below the navigation is a toolbar with icons for Edit, User, Database, Key, and Portfolio.

The main area is titled 'Public' and contains the following fields:

- 1 Name***: Public
- 2 Active**: checked
- 3 Description**: A calendar for public events that the church hosts and promotes.
- 4 Calendar CSS Class**: fa fa-calendar
- 5 Indexing Enabled**: Yes
- 6 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			
- 7 Content Channels**:

Channel
External Website Ads
Service Bulletin

At the bottom are 'Save' and 'Cancel' buttons. A note at the bottom left says 'Crafted by 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 Indexing Enabled

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

6 Event Attributes

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

7 Content Channels

We'll cover content channels later in the Bringing It All Together chapter.

For now just know that you can link content channels to events to allow you to easily promote them.

Calendar Security

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

Events

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

Tools > Calendars > Calendar

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

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

Calendar Details

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**

1 Name * Rock Solid Finances Class **2 Active** **3 Approved**
Approved at 9:36 AM on 6/26/2015 by Alisha Admin.

4 Summary

5 Description
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.

6 Audiences
All Church Men Women Adults

7 Photo

8 Calendars Internal Public

9 Details URL

10 Event Attribute Values

Public

Twitter Photo
Facebook Photo

11 Event Occurrence Attributes

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

Save **Cancel**

Crafted by Spark Development Network / License

- 1 Name**
The name of the event.
- 2 Active**
Whether the event is currently active.
- 2 Approved**
If you have 'Approval' permission to the calendar you'll be able to approve the event here.
- 4 Summary**
A quick description of the event that will display on the calendar when listing multiple events.
- 5 Description**
A more complete description of the event that will be displayed on the event detail page.
- 6 Audiences**
This helps to categorize the events by those who would be most interested. These are the same audience choices that are used for the other web content channels.
- 7 Photo**
A picture is worth a thousand words right? So don't skimp - include one on your event.
- 8 Additional Calendars**
As we mentioned above, you can place your event on as many calendars as you'd like.
- 9 Details URL**
If you provide a web address here it will be used instead of the Rock event details page when your guests click 'More Information' from the calendar.
- 10 Attribute Values**
Remember how we could define custom attributes for the events on custom calendars? This is where you'll add the values for these attributes. The attributes are grouped by calendar.
- 11 Event Occurrence Attributes**
Define an attribute on an Event Item where the value is set on each of its Event Item Occurrences.

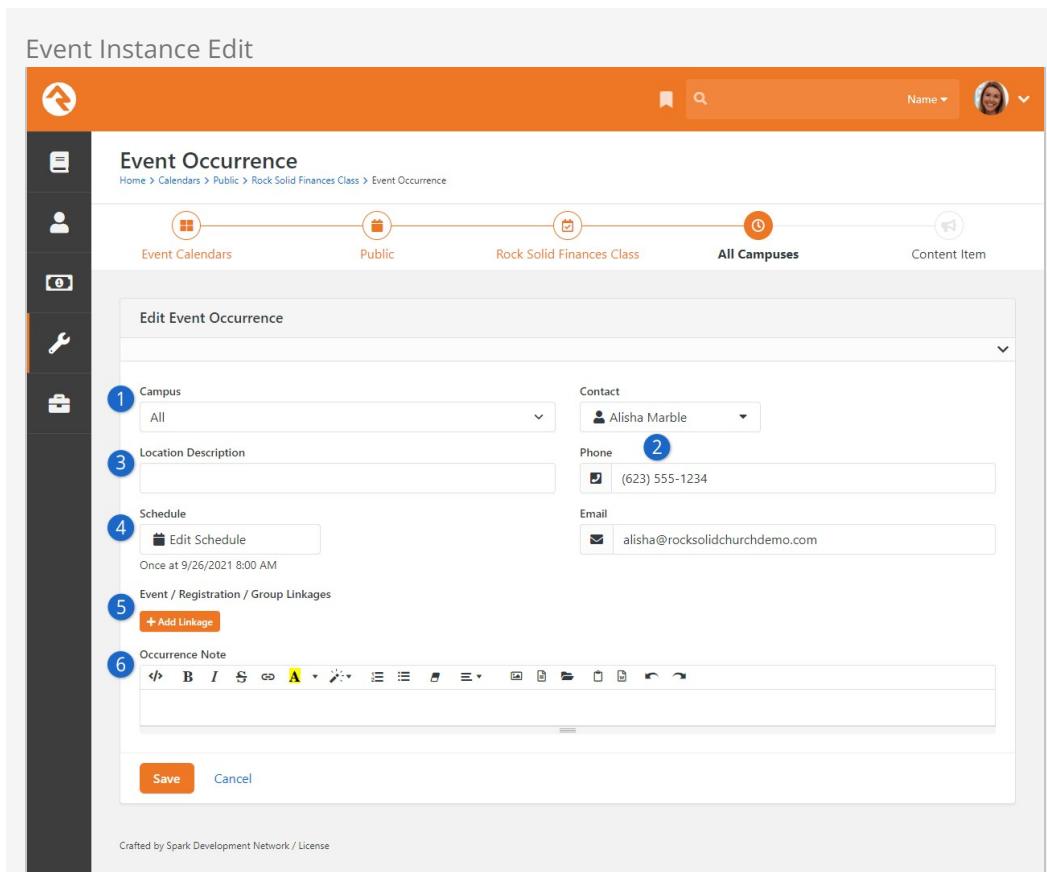
Follow An Event

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

Event Occurrences

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

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



The screenshot shows the 'Event Instance Edit' interface. At the top, there's a navigation bar with icons for Home, Calendars, Public, Rock Solid Finances Class, and Event Occurrence. Below the navigation is a toolbar with icons for Event Calendars, Public, Rock Solid Finances Class, All Campuses, and Content Item. The main area is titled 'Edit Event Occurrence'. It contains several input fields and buttons:

- 1 Campus:** A dropdown menu set to 'All'.
- 2 Contact:** A dropdown menu set to 'Alisha Marble'.
- 3 Location Description:** An input field.
- 4 Schedule:** A button labeled 'Edit Schedule' with a note 'Once at 9/26/2021 8:00 AM'.
- 5 Event / Registration / Group Linkages:** A button labeled '+ Add Linkage'.
- 6 Occurrence Note:** A rich text editor.

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

1 Campus

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

2 Contact Information

Next we select who the contact will be and provide their email and phone number.

3 Location Description

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

4 Schedule

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

5 Linkages

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

6 Occurrence Note

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

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

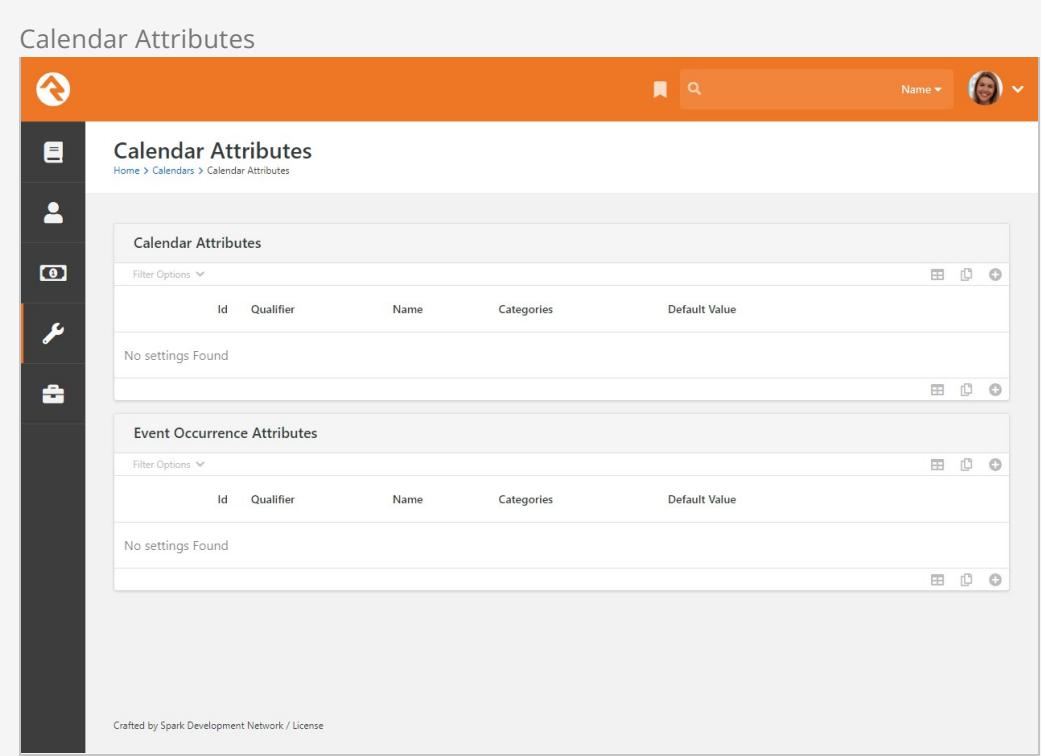
Once you save your calendar occurrence, you'll be taken to the occurrence detail screen. From here you'll see that you can click the button to add a new content channel item, or you can click the button to link to an existing content channel item. Adding and connecting with content channel items allows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

The screenshot shows the 'Event Instance Detail' screen for an 'Event Occurrence'. The top navigation bar includes a search bar and a user profile. The main content area has tabs for 'Event Calendars', 'Public', 'Rock Solid Finances Class', 'All Campuses', and 'Content Item'. The 'Event Occurrence' tab is selected, displaying details like 'Campus All', 'Schedule Once at 9/26/2021 8:00 AM', and contact information for Alisha Marble. Below this is a 'Content Channels' section with two expanded sections: 'External Website Ads' and 'Service Bulletin', both showing 'No Items Found'. The bottom of the screen includes a footer with the text 'Crafted by Spark Development Network / License'.

Event Occurrence Attributes

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

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



The screenshot shows the 'Calendar Attributes' screen. On the left is a vertical sidebar with icons for Home, Calendars, People, Tools, and Events. The main area has a header 'Calendar Attributes' with a back arrow, search bar, and user profile. Below the header are two sections: 'Calendar Attributes' and 'Event Occurrence Attributes'. Each section has a table with columns: Id, Qualifier, Name, Categories, and Default Value. Both sections show 'No settings Found'. At the bottom of the screen is a footer with the text 'Crafted by Spark Development Network / License'.

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

Event Item Occurrence Attributes

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

The screenshot shows the 'Event Item Attributes' screen. On the left is a vertical toolbar with icons for Home, People, Events, and Settings. The main area has a header 'Adults' with a close button 'x'. Below it is a section titled 'Calendars 1 •' with two checkboxes: 'Internal' (checked) and 'Public' (checked). There's also a 'Details URL' input field. A large expandable section titled 'Event Attribute Values' is collapsed. Another expandable section titled 'Event Occurrence Attributes' is expanded, showing a table:

Attribute	Description	Field Type	Required	Show in Grid	Allow Search
Lunch Provided?	Will lunch be provided?	Boolean	✓		

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

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

Calendar Blocks

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

Calendar Block

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

Calendar

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

March 2022						
S	M	T	W	T	F	S
27	28	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	8	9

[View Details >](#)

Date	Time	Location	Summary
Mar 8	5:00 PM	All Campuses	Customs & Classics Car Show

[View Details >](#)

Date	Time	Location	Summary
Mar 10	6:30 PM	All Campuses	Rock Solid Finances Class

[View Details >](#)

Date	Time	Location	Summary
Mar 12	10:00 AM	All Campuses	Warrior Youth Event

Powered by: [Rock RMS](#) 3120 W Cholla St Phoenix, AZ 85029-4113

Event Detail Block

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

Event Details

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

Contact
Alisha Admin
admin@organization.com

Date / Time
Thursday, March 10, 2022 @ 6:30 PM

[Register](#)

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 nisl sed, ultricies condimentum sapien. Proin facilisis quam diam, quis varius risus aliquam eu. Suspendisse sed neque interdum nulla egestas molestie eget sed est. Mauris sed eros in neque scelerisque consequat. Ut commodo semper pharetra.

Powered by: [Rock RMS](#) 3120 W Cholla St Phoenix, AZ 85029-4113

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 calendar URL has a specific format:

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

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

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

work.

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

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

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

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

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

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

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

Export Calendar Feed

The screenshot shows the 'Event Calendar' feed interface. The left sidebar has icons for Home, Calendars, Public, Event, Event Occurrence, and Content Item. The main area shows a single event item named 'Public'. The description states: 'A calendar for public events that the church hosts and promotes.' It is noted that it is not indexed. Below this is a table titled 'Event Items' with one row:

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

At the top right, there is a blue button labeled 'Export Calendar Feed' with a gear icon.

Bringing It All Together

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



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

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

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

1. **No Registration Required:** Select this option if you're not linking the event to a registration. This lets you link a URL Slug to the event without needing a registration instance.
2. **Create Registration Instance:** This lets you set up a new registration instance directly from the calendar occurrence instead of creating it separately and having to link them later.
3. **Use Existing Registration Instance:** If you already have a registration instance created then you can use this option to link it to this event occurrence.
4. After saving the occurrence, you can optionally enter any content channel items you need for your event. See below for more details.

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

URL Slug Required

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

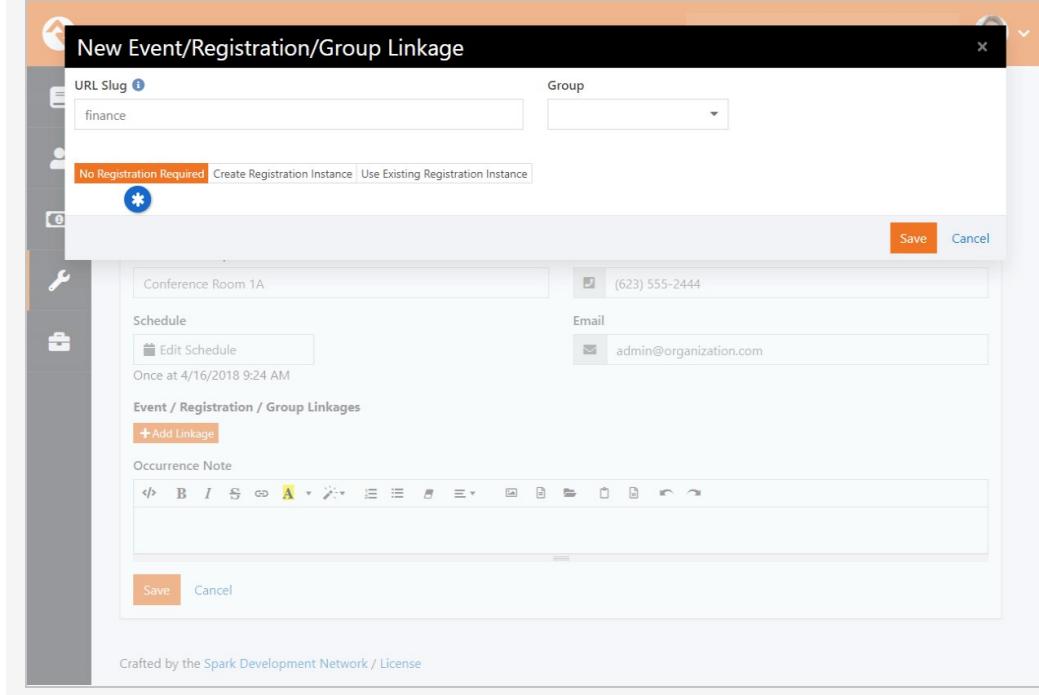
Adding Calendar Linkages

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

No Registration Required

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

No Registration Required



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

URL Slugs: Say what?!

A "slug" is a common web term that refers to a part of a web address that identifies a page, or component of a page, using human-readable keywords. If you're not Noah Webster, that means instead of saying

`Registration?RegistrationInstanceId=153` you can say

`Registration/SummerCamp2021`. In most cases the slug can be whatever you want, but try to use only letters and numbers (e.g. SummerCamp2021) if possible because some special characters may cause issues with browsers. Keeping that in mind, dashes are commonly used (e.g. Summer-Camp-2021) without causing problems.

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

Create Registration Instance

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

Create Registration Instance

The screenshot shows a software interface titled 'New Event/Registration/Group Linkage'. At the top left is a 'URL Slug' input field containing 'finance'. To its right is a 'Group' dropdown menu showing 'Rock Solid Finances ...'. Below these are three buttons: 'No Registration Required' (disabled), 'Create Registration Instance' (highlighted in orange), and 'Use Existing Registration Instance'. A blue asterisk icon is positioned between the first two buttons. The main form area is divided into sections: 'Registration Type' (with a dropdown set to 'Rock Solid Finances'), 'Registration Template *' (dropdown set to 'Rock Solid Finances'), 'Registration Instance Name *' (input field 'April Rock Solid Finances') and 'Public Name *' (input field 'Rock Solid Finances'), 'Registration Details' (including 'Registration Starts' on 11/01/2020 at 12:00 AM, 'Registration Ends' on 02/28/2021 at 12:00 AM, 'Maximum Attendees' set to 50, 'Registration Workflow' set to 'Photo Request', and 'Send Reminder Date' on 04/25/2021 at 9:00 AM), and 'Registration Contact Information' (Contact dropdown set to 'All Admins' and Contact Phone input field showing '(407) 555-1234').

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

Use Existing Registration Instance

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

Use Existing Registration Instance

The screenshot shows a modal dialog titled "New Event/Registration/Group Linkage". At the top, there are fields for "URL Slug" (set to "finance") and "Group" (set to "Rock Solid Finances"). Below these are three tabs: "No Registration Required", "Create Registration Instance", and "Use Existing Registration Instance", with the latter being the active tab. Under "Use Existing Registration Instance", there are fields for "Registration Type" (with a blue asterisk icon), "Registration Template" (set to "Rock Solid Finances"), "Registration Instance" (set to "April Rock Solid Finances"), and "Public Name" (set to "Rock Solid Finances"). At the bottom right of the dialog are "Save" and "Cancel" buttons. The background of the page shows a list of "Event / Registration / Group Linkages" with a "+Add Linkage" button, and a note at the bottom: "Crafted by the Spark Development Network / License".

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

Linking Content Channel Items

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

Add Content Channel Item

The screenshot shows two overlapping pages. The top page is titled 'Event Occurrence' and displays details for an event named 'Summer Camp'. It includes fields for Campus (All), Contact (Alisha Admin), Location Description (Camp Site), Schedule (Daily at 10:00 AM), and Event / Registration / Group Linkages (Summer Camp). An 'Occurrence Note' section contains the text 'This is for our Summer Camp.' Below this are 'Edit' and 'Delete' buttons. The bottom page is titled 'Content Channels' and lists items under 'External Website Ads'. One item, 'Summer Camp', is shown with a start date of 7/3/2022 12:00 AM, an expiration date of 8/1/2022 12:00 AM, priority 0, and status 'Approved'. Below the table are buttons for filtering (50, 500, 5,000) and a total count of 1 item. A 'Service Bulletin' section is also visible. The interface includes a sidebar with icons for Home, Calendars, Public, Summer Camp, All Campuses, and Content Item.

1 Event Occurrence

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

2 Content Channels

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

3 Add New Item

Clicking the button lets you add a new content channel item to the corresponding content channel.

4 Link Existing Item

You can click the button to link the event occurrence to a content channel item that has already been created.

For more details on creating and working with content channels, check out our [Designing and Building Websites Using Rock](#) manual.

Securing Calendars and Events

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

Securing Calendars

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

Securing Event Registrations

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

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

Event Blocks

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

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

Calendar Block

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

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

External Calendar

The screenshot shows a web-based calendar interface for "Rock Solid Church Demo". At the top, there's a navigation bar with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar" (which is highlighted in dark blue), "Watch", and "Hello Alisha ▾". Below the navigation is a header "Calendar" and a breadcrumb "Home / Calendar".

The main content area features a calendar grid for March 2022. The grid shows dates from March 6 to March 12. The 10th is highlighted in blue, indicating it's the current date. Below the grid are three event cards:

- Customs & Classics Car Show** (Mar 8, 5:00 PM, All Campuses)
- Rock Solid Finances Class** (Mar 10, 6:30 PM, All Campuses)
- Warrior Youth Event** (Mar 12, 10:00 AM, All Campuses)

At the bottom left, it says "Powered by: Rock RMS". At the bottom right, it says "3120 W Cholla St Phoenix, AZ 85029-4113".

Event Item Occurrence Detail

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

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

Event Occurrence Detail

The screenshot shows a website header with navigation links: New Here?, Resources, Connect, Give, Blog, Calendar, Watch, and Hello Alisha. The main content area has a title 'Event Details' and a breadcrumb trail: Home / Calendar / Rock Solid Finances Class. On the left, there's a 'Contact' section with 'Alisha Admin' and email 'admin@organization.com', a 'Date / Time' section showing 'Thursday, March 10, 2022 @ 6:30 PM', and a blue 'Register' button. Below these are social sharing icons for Facebook, Twitter, Email, and Print. To the right is a banner for 'ROCK SOLID FINANCIAL' featuring a pen and financial documents. The main title 'Rock Solid Finances Class' is displayed, followed by a short description: 'Duis vel massa egestas, cursus odio vestibulum, pulvinar felis. Quisque mattis enim nec libero euismod venenatis id nec arcu. Donec quis lectus leo. Nullam nec enim a massa placerat fermentum. Pellentesque dolor turpis, imperdiet nec nisl sed, ultricies condimentum sapien. Proin facilisis quam diam, quis varius risus aliquam eu. Suspendisse sed neque interdum nulla egestas molestie eget sed est. Mauris sed eros in neque scelerisque consequat. Ut commodo semper pharetra.' At the bottom, it says 'Powered by Rock RMS' and '3120 W Cholla St Phoenix, AZ 85029-4113'.

Calendar Item Occurrence List Lava

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

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

Calendar Item Occurrence List Lava

The screenshot shows a block titled "REGISTER FOR BAPTISMS" with "PHOENIX CAMPUS" underneath. It lists four occurrences:

- Saturday, Jan 16 / 5:45PM
- Sunday, Jan 17 / 10:15AM
- Saturday, Feb 20 / 5:45PM
- Sunday, Feb 21 / 10:15AM

Calendar Item Occurrence List By Audience Lava

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

Below are some of the options available in the block's settings.

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

Calendar Item Occurrence List By Audience Lava

The screenshot shows a block titled "Upcoming Events". It lists two events:

- Warrior Youth Event Tuesday, Dec 15 / 12:49PM
- Summer Camp 2015 Thursday, Jun 30 / 12:00AM

Event Calendar Item Personalized Registration

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

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

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

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

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

The block requires the following inputs through the URL:

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

The screenshot shows a web-based application for registering people for an event. The top navigation bar is orange with the title "Event Calendar Item Personalized Registration". On the left, there's a vertical sidebar with icons for Home, People, Events, Settings, and Forms. The main content area has a header "Find Starting Point" and a sub-header "Starting Point Registration". A dropdown menu "Campus" is set to "Main Campus". Below this, a section titled "Select An Upcoming Starting Point" lists three events:

Date	Start Time	Contact	Campus
10/2/2021 (Saturday)	9:00 AM	Alisha Marble alisha.marble@rocksolidchurchdemo.com (623) 555-2444	Main Campus
10/9/2021 (Saturday)	9:00 AM	Alisha Marble alisha.marble@rocksolidchurchdemo.com (623) 555-2444	Main Campus
10/16/2021 (Saturday)	9:00 AM	Alisha Marble alisha.marble@rocksolidchurchdemo.com (623) 555-2444	Main Campus

At the bottom, there's a "Register" section where "Ted Decker (Adult)" is checked, and "Cindy Decker (Adult)" is unchecked. There are also checkboxes for "Noah Decker (Child)" and "Alex Decker (Child)". An "Email Reminder Address" field contains "ted@rocksolidchurchdemo.com". A large orange "Start Registration" button is at the bottom.

