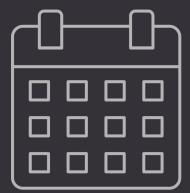
JANUARY	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
APRIL	MAY
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
AUGUST	1 2 3 4 5 6 7 8 9 10 11 12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



EVENT CALENDAR GUIDE

Welcome

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

Enable SSL

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

Event Registration Overview

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

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

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

The Basics of Event Registration

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

Registrar vs. Registrant

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

Registration Templates vs. Registration Instances

As you use the event features you'll find that many of your registrations are actually identical in terms of costs, fees and fields. To simplify the process of creating new registrations in these cases we've created the concept of a Registration Template. The template is where you'll configure the majority of the settings for a registration (things like costs, required entry fields, fees, etc.). Once the template is complete, you can create *instances* of them that configure the settings that would be specific to the event (registration start and end dates, contact info, etc.). Still a little confused? Let's look at some examples.

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

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

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

The Role of Groups

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

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

A Typical Event Registration

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

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

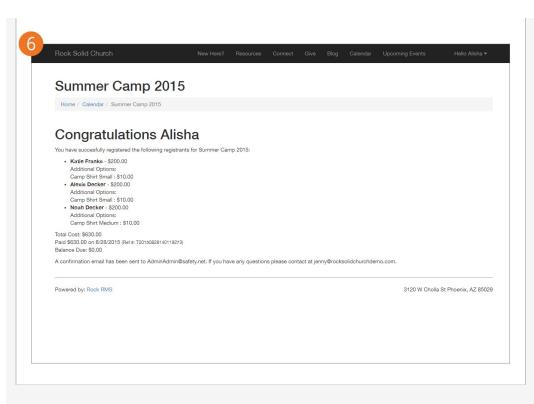
Registration Walkthru

Summer Camp 2015		
Home / Calendar / Summer Camp 2015		
How mai	ny registrants will you	be registering?
	- 1 +	
		Nex
Powered by: Rock RMS		3120 W Cholla St Phoenix, AZ 850
Rock Solid Church Summer Camp 2015	New Here? Resources Connect Give E	łkog Calendar Upcoming Events Hello Alisha ❤
	New Here? Resources Connect Give E	llog Calendar Upcoming Events Helio Alisha •
Summer Camp 2015 Home / Calendar / Summer Camp 2015	New Hare? Resources Connect Give E	llog Calendar Upcoming Events Hello Alisha ♥
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant		Bog Galendar Upcoming Events Hello Alisha ♥
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday	Last Name *	llog Calendar Upcoming Events Hello Alisha ♥
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr 1 4 1 2008 1	Last Name *	llog Calendar Upcoming Events Hello Alisha ♥
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr • / 4 • / 2008 • Sender	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr v / 4 v / 2008 v Cender Female	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr 1 4 1 2008 Gender Female Leader Preference	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant Katie Birthday Apr 1 4 1 2008 Gender Female Leader Preference Cindy Decker	Last Name *	Nog Calendar Upcoming Events Hello Alisha •
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr 1 4 1 2008 Gender Female Leader Preference	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr • / 4 • / 2008 • Gender Female Leader Preference Cindy Decker Calein Preference With Alexis Decker	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr v / 4 v / 2008 v Cender Female Leader Preference Cindy Decker Cabin Preference	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name * Katie Birthday Apr • / 4 • / 2008 • Conder Female Leader Preference Cindy Decker Cabin Preference With Alexis Decker Mith Alexis Decker	Last Name *	
Summer Camp 2015 Home / Calendar / Summer Camp 2015 First Registrant First Name* Katie Birthday Apr • / 4 • / 2008 • Gender Female Leader Preference Cindy Decker Cabin Preference With Alexis Decker Mith Alexis Decker	Last Name *	

Summer Camp 2015				
Home / Calendar / Summer Camp 2015				
Second Registrant				
Alexis is in the same family as *				
Katie Franks				
None of the above				
First Name *		Last Name *		
Alexis	Ē.	Decker		
Birthday				
Feb V / 10 V / 2008 V				
Feb ▼ / 10 ▼ / 2008 ▼ Gender <th></th> <th></th> <th></th> <th></th>				
Gender				
Gender Female				
Gender Female Leader Preference				
Gender Female Leader Preference Cindy Decker				
Gender Female Leader Preference Cindy Decker Cabin Preference With Katie Franks				
Gender Female Leader Preference Cindy Decker Cabin Preference				
Gender Female Leader Preference Cindy Decker Cabin Preference With Katie Franks Additional Options				
Gender Female Leader Preference Cindy Decker Cabin Preference With Katie Franks Additional Options Camp Shirt				
Gender Female Leader Preference Cindy Decker Cabin Preference With Katie Franks Additional Options Camp Shirt				Next

Summer Camp 2015			
Home / Calendar / Summer Camp 2015			
Third Registrant			
mild negistrant			
Noah is in the same family as *			
Katie Franks			
Alexis Decker None of the above			
First Name *	Last Name •		
Noah	Decker		
Birthday			
Mar • / 10 • / 2005 •			
Gender			
Male			
Leader Preference			
Ted Decker			
Cabin Preference			
Additional Options			
Camp Shirt			
Medium (\$10.0			
Previous			
			Nex

Summer Camp 2015			
Home / Calendar / Summer Camp 2015			
Review Registration			
Your Information			
First Name *		Last Name *	
Ted	۵	Decker	
Send Confirmation Emails To *		You are in the same family as *	
ted@rocksolidchurchdemo.com		Katie Franks Alexis & Noah Decker None	
Payment Summary			
Description			Amoun
Katie Franks			\$ 200.0
Camp Shirt-Small (1 @ \$10.00)			\$ 10.0
Alexis Decker			\$ 200.0
Camp Shirt-Small (1 @ \$10.00)			\$ 10.0
Noah Decker			\$ 200.0
Camp Shirt-Medium (1 @ \$10.00)			\$ 10.0
			Minimum Due Tod \$300. Amount To Pay Toda \$630.00 Amount Remainii \$0.
Payment Information Name on Card			
Credit Card #			
Expiration Date		Card Security Code	
		Guid Security Code	
Address			
City		State Zip	
		AZ	



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

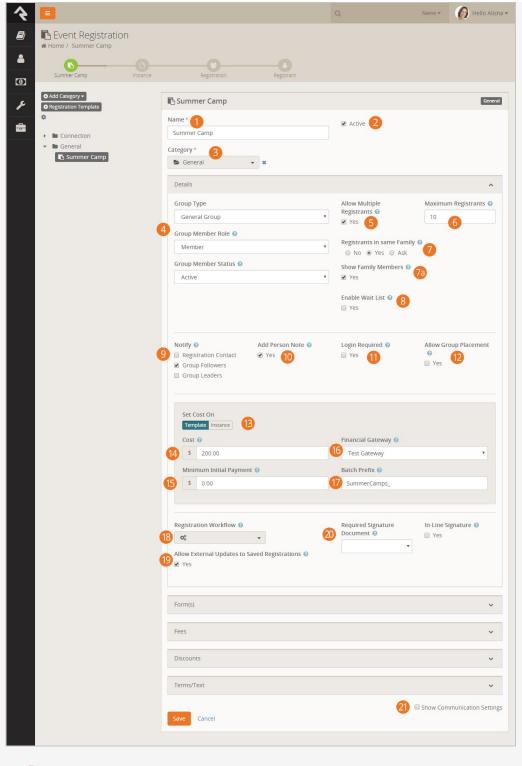
6 Done!

Registration Templates

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

General Settings

General Settings



1 Template Name

The name of your template.

2 Active

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

3 Category

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

category.

4 Group Type / Group Member Role / Group Member Status

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

5 Allow Multiple Registrants

Fairly straight forward.

6 Maximum Registrants

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

7 Registrants In The Same Family

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

7a Show Family Members

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

8 Wait List

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

9 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.

10 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.

11 Login Required

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

12 Allow Group Placement

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

13 Set Cost On

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

14 Cost

The cost of the registration.

15 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.

16 Financial Gateway

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

17 Batch Name Prefix

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

18 Registration Workflow

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

19 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.

20 Required Signature Document

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

21 Show Communication Settings

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

Digital Signitures

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

Forms

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

Form Field List

efaul	t Form									^
	Field	Source	Туре	Internal	Common	Use Current Value	Required	Show on Grid		
=	First Name	Person Field					~	~	ø	×
=	Last Name	Person Field					~	~	ø	×
≡	Birthdate	Person Field					~		ø	×
≡	Gender	Person Field					~		di	×
≡	Leader Preference	Registration Attribute	Text		~					×
=	Cabin Preference	Registration Attribute	Text		~					×
										0

Form Field Edito	r		
Form Field			×
Source Person Attribute	Internal Field 📀	Common Value 🕑 🗌 Yes	Use Current Value 📀 🗌 Yes
Person Attribute Ability Level Pre-Text	Required 💿	Show on Grid 💿 📄 Yes	
1			
Post-Text			
			Save Cancel

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

When adding fields, you have 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

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

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

- **Common Value:** Filling out forms can be tedious. This setting allows you to take the entered value from the first registration and auto-populate the same field for the subsequent registrants.
- **Internal:** This setting allows you to define the attribute, but keep it from being displayed on the external registration form. It will be made available however when editing the form internally. This is used for internal fields that will be entered after the registration takes place, or for simply displaying, for example, an existing person attribute on the grid for event-administration purposes.
- **Use Current Value:** In an effort to reduce the amount of data that must be entered, this setting takes the current value from the registar's record. This is especially helpful for attributes like 'Address'.
- **Show On Grid:** This will place this attribute on the grid of registrants. It can be very helpful as long as you limit the number of items you put on the grid.
- **Pre-Text / Post-Text:** Like the workflow entry forms, these fields allow you to surround your entry fields with custom HTML markup. With some basic web design knowledge you can use these fields to create richer experiences.

Optional Fees

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

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

s of Fees	
1 Single Option T-Shirt (\$10.00)	 2 Single Option with Quantity T-shirt (\$10.00) + -
3 Multiple Options T-Shirt \$ (\$10.00) M (\$15.00) L (\$20.00)	Multiple Options with Quantity T-shirt S (\$10.00) 0 + M (\$15.00) 0 + L (\$20.00) 0 +
Single Option Fee You either want it or you don't.	
Single Option Fee with Quant You can get as many as you wa	-
Multiple Options Variety is the spice of life.	
Multiple Options with Quanties What's better than a little spice	

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

Fees						1
				Enable	Discount	
	Fee	Options	Cost	Quantity	Applies	
=	Camp	Multiple	Small-\$10.00, Medium-\$10.00, Large-			×
	Shirt		\$10.00, X-Large-\$10.00			
						0

Name *	
Options	
● Single ○ Multiple	
Cost	
S	
Enable Quantity 🚱	
Yes	
Discount Applies 📀	
Yes	
	Save Can
	Save
1 Name This will be used for the label that goes above the fee select	tion.
Options Here is where you'll make the determination of whether the	
multiple options. When selected, it will display a key/value in allows you to enter optional text as well as the cost.	
allows you to enter optional text as well as the cost. Bable Quantity	

Discounts allow you to give individuals a code to reduce the amount of their registration. This discount can be in the form of a percentage of costs/fees or a fixed amount.

count List		
Discounts		^
Code	Discount	
≡ STAFF		50.00 %
		0

Discount Editor		
Discount Code		
Discount Code •		
Discount Type		
ercentage Amount		
Discount Percentage		
0 %		
	Save	Cancel

Confirmation Email

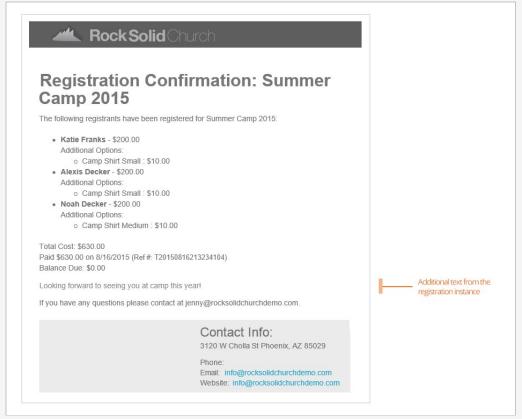
After completing the registration, you can set up a confirmation email. This email also acts as an emailed receipt.

Confirmation Email Settings

FIOIN	Name
{ { Re	gistrationInstance.ContactName }}
From	Email
{{ Re	gistrationInstance.ContactEmail }}
Subje	t.
{{ Re	gistrationInstance.Name }} Confirmation
Confir	mation Email Template
5	<pre></pre>
6	with the first actorities and the matter actorities and the first actorities
7	
8	The following {{ RegistrationInstance.RegistrationTemplate.RegistrantTerm PluralizeForQuantity:registra
9	{% if registrantCount > 1 %}have{% else %}has{% endif %} been registered for {{ RegistrationInstance.Name
10	
11	
12	<u>></u>
13	{% for registrant in Registration.Registrants %}
14	
15	
16	<pre>{{ registrant.PersonAlias.Person.FullName }}</pre>
17 18	(Wife projection of Cost > 0.9%)
10	<pre>{% if registrant.Cost > 0 %} - {{ currencySymbol }}{{ registrant.Cost Format:'#,##0.00' }}</pre>
10	<pre>- {{ currencysymbol }}{ registrant.cost rormat: #,##0.00 }} {% endif %}</pre>
19	for clust of
20	{% assign feeCount = registrant.Fees Size %}
20 21	
20 21 22	
20 21	<pre>{% if feeCount > 0 %}</pre>

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.

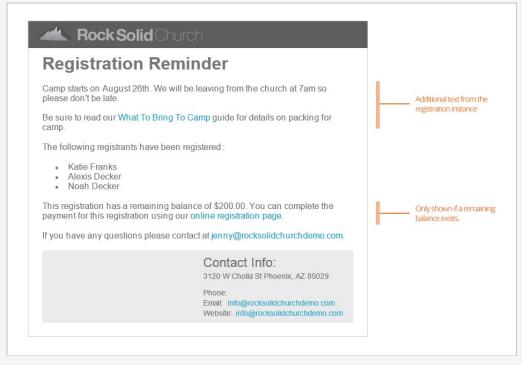
Default Confirmation Email



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.

Reminder Email Settings



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

Payment Reminder Email

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

Reminder Email Settings

Paym	ent Reminder Email	^
From	Name	
{{ R	egistrationInstance.ContactPersonAlias.Person.Full	
From	Email	
{{ R	egistrationInstance.ContactEmail }}	
Subje	ct	
{{ R	egistrationInstance.Name }} Payment Reminder	
Confi	mation Email Template	
2 2 3 3 4 4 5 6 6 7 7 8 9 9 100 11 12 13 3 14 15 16 6 17 7 18 19 200 21 Paym 30	<pre>{% capture externalSite %}{{``Global' Attribute: 'PublicApplicationRoot' }}{% endcapture %} {% assign registrantCount = Registration.Registrants Size %} <hl>{{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Payment Reminder</hl> This {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm Downcase }} for {{ RegistrationInstance.Registration.BalanceDue Format: '#,###0.00' }}. The {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} Downcase }} for this {{ RegistrationInstance.RegistrationTemplate.RegistrationTerm }} are below. (ul> {% for registrant in Registration.Registrants %} (il>{{ registration.Registration.Registrants %} (il>{{ registration.Person.FullName }}</pre>	v ►

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

Regist	ration Term	Fee Term
Regi	istration	Additional Options
Regist	rant Term	Discount Code Term
Regi	strant	Discount Code
Succes	ss Title 😧	
Cong	gratulations {{ Registration.FirstName }}	
1 2 3 4	<pre>{% assign registrantCount = Registration.Reg You have succesfully registered the fol: </pre>	lowing
1 2 3 4 5 6 7 8 9	<pre>(% capture currencySymbol %){{ 'Global' At {% assign registrantCount = Registration.Reg {>> You have succesfully registered the fol: {{ RegistrationInstance.RegistrationTemp for {{ RegistrationInstance.Name }}: {/p> {ul> {% for registrant in Registration.Registrant {li> {{ registrant.PersonAlias.Per {% if registrant.Cost > 0 %}</pre>	gistrants Size %} lowing plate.RegistrantTerm PluralizeForQuantity:registrantCount Down ts %} erson.FullName }} rant.Cost Format:'#,##0.00' }}

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

Registration Instance Settings

	Q, Nam	e - 👩 Hello Alisha
Registration Instance		
Home / Summer Camp / Summer Camp 2015		
0-0-		
Summer Camp Summer Camp 2015 Registration	Registrant	
🗅 Summer Camp 2015		Summer Camp
Registration Instance Name @ •	Active 2	
Summer Camp 2015	¥a ⊗ Yes 🐸	
Registration Starts 3	Account • 5	
5/1/2015 🗎 12:00 AM O	Event Registration ✓	
Registration Ends 4 9/10/2015 12:00 AM Ø	Contact Sense	
Maximum Attendees	Contact Phone 6	
200	(602) 555-3245	
Registration Workflow 🛛 7	Contact Email	
α; •	jenny@rocksolidchurchdemo.com	
Send Reminder Date 8 8/3/2015 9:00 AM 0 9 • Yes	nt	
Additional Reminder Details @		
B Source B I U S ≔ ≔ ∞ ⊡ ⊡ I _x Format -		
Looking forward to seeing you at camp this year!		
Save Cancel Crafted by the Spark Development Network / License		
Registration Instance Name		
This is actually an important fiel	d that will be shown during the	
registration process. It will be u	sed to describe the event that yo	u are
registering for (e.g. Thank You for	or Registering for "").	
Active		
This determines if the registration	on instance is currently active	
inis determines if the registration	on instance is currently active.	
Registration Starts		
The date and time that the regis	stration starts.	
Pogistration Ends		
Registration Ends The date and time that the regis	stration ands	
the date and time that the regis		
Account		
Account	egistration costs/fees should be	

6 Contact Name / Phone / Email

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

7 Registration Workflow

You can optionally configure a workflow to run at the end of each

registration. The registration will be passed in as the entity on the workflow. A similar setting exists on the template if you would like to ensure that all instances have the same workflow.

8 Send Reminder Date

The date and time that the reminder should be sent.

9 Reminder Send

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

10 Reminder Sent

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

11 Additional Reminder Details

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

12 Additional Confirmation Details

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

Setting the Price on the Registration Instance

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

Follow A Registration Instance

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

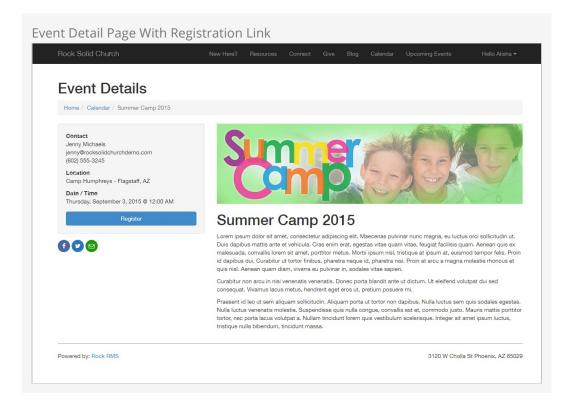
Now that we've shown you how to make a new registration instance from this page, we should tell you that you'll rarely ever create an instance from here. More about that later in the chapter *Bringing It All Together*.

Managing Event Registrations

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

Promoting Your Registration

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



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

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

Managing Registrations

You can mange 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.

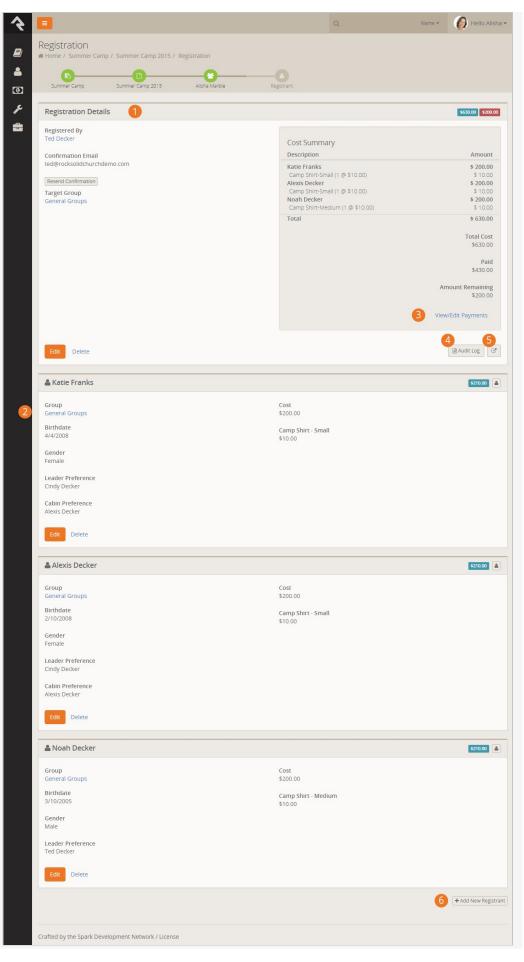
Registrations Tab

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

Registiati	on instance	Detail Page				-
२ 💶				Q	Name 👻	🜔 Hello Alisha 🕶
Re Home	gistration Instand	C e ummer Camp 2015				
Sun	Imer Camp Summ	ner Camp 2015 Registration	n Registrant			
پ د ⊡Su	mmer Camp 2015					Summer Camp
Name Sumn	e ner Camp 2015					
Accou Event	int Registration					
Edit	Delete					
Regist	rations Registrants	Payments Linkages				
& Re	gistrations					
Regist	ered By	Registrants	When	Total Cost	Balance Due	Filter Options 💙
Decke	r, Ted	Alexis Decker Katie Franks Noah Decker	11/16/2015 10:52 PM	\$630.00		\$200.00
Simme	ons, Sarah	Bobby Thompson Brian Jones Joey Thompson	11/16/2015 10:47 PM	\$630.00		\$0.00
50	500 5,000 2 Registrations	:				• • •
Crafted	by the Spark Developmen	t 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



1 Registration Details

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

2 Registrant Details

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

3 View Edit Payments

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

4 Audit Log

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

5 Move Registration

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

6 Add New Registrant

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

Registrants Tab

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

PR			Q	Name 👻 🌔 I	Hello
	gistration Instance				
A Hom	e / Event Registration / Summer Camp 2	015			
Sur	mmer Camp Summer Camp 2015	Registration Regi	strant		
L SI	ummer Camp 2015			Su	ımmer
Nam				_	
	mer Camp 2015				
Acco					
Even	t Registration				
Edi	t Delete				
📽 R	legistrants				
				Fit	er Opt
	Registrant	Group	Fees		
	Decker, Alexis	General Groups	Camp Shirt (\$10.00)		•
	Decker, Noah	General Groups	Camp Shirt (\$10.00)		,
	Franks, Katie	General Groups	Camp Shirt (\$10.00)		•
	Jones, Brian	General Groups	Camp Shirt (\$10.00)		•
	Thompson, Bobby	General Groups	Camp Shirt (\$10.00)		•
	Thompson, Joey	General Groups	Camp Shirt (\$10.00)		3
50	500 5,000 6 Registrants				
				B) 😫 🖷 O	=

Payments Tab

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

=					Q	Name 🕶	Hello Alishi
Registratio	on Instance gistration / Summer Camp 2						
Home / Event Re		2015					
Summer Camp	Summer Camp 2015	R	egistration	Registrant			
🗋 Summer Ca	mp 2015						Summer Camp
Name	• • • • • • • • • • • • • • • • • • • •						
Summer Camp 20)15						
Account Event Registration							
Event Registration							
Edit Delete							
Registrations	Registrants Payments	Linkages					
	Registrants Payments	Linkages					
Registrations	Registrants Payments	Linkages					
	Registrants Payments	Linkages					Filter Options 💊
	Registrants Payments Date / Time	Linkages	Payment Method	Account	Transaction Code	Registrar	Filter Options № Registrant(s)
Payments			Payment Method Credit Card - Visa	Account	Transaction Code T20151116225244496	Registrar Ted Decker	Filter Options ↓ Registrant(s) Katie Franks Alexis Decker Noah Decker
Person	Date / Time	Amount					Registrant(s) Katie Franks Alexis Decker Noah Decker
Person Decker, Ted Simmons, Sarah	Date / Time 11/16/2015 10:52:00 PM	Amount \$430.00	Credit Card - Visa	************1111	T20151116225244496	Ted Decker	Registrant(s) Katie Franks Alexis Decker Noah Decker Bobby Thompsor Brian Jones
Person Decker, Ted Simmons, Sarah	Date / Time 11/16/2015 10:52:00 PM 11/16/2015 10:47:00 PM	Amount \$430.00	Credit Card - Visa	************1111	T20151116225244496	Ted Decker	Registrant(s) Katie Franks Alexis Decker Noah Decker Bobby Thompson Brian Jones Joey Thompson
Person Decker, Ted Simmons, Sarah	Date / Time 11/16/2015 10:52:00 PM 11/16/2015 10:47:00 PM	Amount \$430.00	Credit Card - Visa	************1111	T20151116225244496	Ted Decker	Registrant(s) Katie Franks Alexis Decker Noah Decker Bobby Thompson Brian Jones Joey Thompson
Person Decker, Ted Simmons, Sarah	Date / Time 11/16/2015 10:52:00 PM 11/16/2015 10:47:00 PM	Amount \$430.00	Credit Card - Visa	************1111	T20151116225244496	Ted Decker	Registrant(s) Katie Franks Alexis Decker Noah Decker Bobby Thompson Brian Jones Joey Thompson
Person Decker, Ted Simmons, Sarah	Date / Time 11/16/2015 10:52:00 PM 11/16/2015 10:47:00 PM 2.Payments	Amount \$430.00 \$630.00	Credit Card - Visa	************1111	T20151116225244496	Ted Decker	Registrant(s) Katie Franks Alexis Decker Noah Decker Bobby Thompsor Brian Jones
Person Decker, Ted Simmons, Sarah	Date / Time 11/16/2015 10:52:00 PM 11/16/2015 10:47:00 PM	Amount \$430.00 \$630.00	Credit Card - Visa	************1111	T20151116225244496	Ted Decker	Registrant(s) Katie Franks Alexis Decker Noah Decker Bobby Thompson Brian Jones Joey Thompson

Linkages Tab

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

Regist	tration Instance l	Registrar	nts				
Ŷ					٩	Name 👻	🕢 Hello Alisha 🕶
Ø	Registration Instance						
4							
•	Summer Camp Summer	Camp 2015	Registration	Registrant			
æ	🕒 Summer Camp 2015						Summer Camp
	Name Summer Camp 2015						
	Account Event Registration						
	Edit Delete						
	Luit Delete						
	Registrations Registrants F	Payments Linka	ges				
	% Linkages						
							Filter Options 🗸
	Calendar Item	Campus	Group	Content Item	Public Name	URL Slug	
	Summer Camp 2015 (Public)	All Campuses	General Groups		Summer Camp 2015	SummerCamp2015	× ×
	50 500 5,000 1 Linkage						
							• • •
	Crafted by the Spark Development N	etwork / License					

Group Placement Tab

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

			Q	Search + 👔
Registration Inst #Home / Summer Camp /				
Summer Camp	Summer Camp 2015 Registra	ation Registrant		
🗅 Summer Camp 201	5			Summe
Name Summer Camp 2015		Account Event Regis	stration	
Edit Delete				Send Payment Re
Registrations Registran	its Payments Linkages	iroup Placement		
% Group Placement				
				Fib
Parent Group		Set Group	Member Attributes 📀	Fite
Parent Group	- X	Set Group @ Yes	Member Attributes 😨	Fite
	▼ × Leader Preference		Member Attributes 🛛	Fite
🖀 Camp Groups		🗷 Yes		Fite
Camp Groups Registrant	Leader Preference	Yes Cabin Preference	Group	
 Camp Groups Registrant Decker, Alexis 	Leader Preference Cindy Decker	Yes Cabin Preference Alexis Decker	Group ප	•
 Camp Groups Registrant Decker, Alexis Decker, Noah 	Leader Preference Cindy Decker Ted Decker	Yes Cabin Preference Alexis Decker With Dad	Group	•
 Camp Groups Registrant Decker, Alexis Decker, Noah Franks, Katie 	Leader Preference Cindy Decker Ted Decker Cindy Decker	Yes Cabin Preference Alexis Decker With Dad Alexis Decker	Group	v v v t's Group
 Camp Groups Registrant Decker, Alexis Decker, Noah Franks, Katie Jones, Brian 	Leader Preference Cindy Decker Ted Decker Cindy Decker Ted Decker	Yes Cabin Preference Alexis Decker Vith Dad Alexis Decker With Noah Decker	Group	v v v t's Group
 Camp Groups Registrant Decker, Alexis Decker, Noah Franks, Katie Jones, Brian Thompson, Bobby 	Leader Preference Cindy Decker Ted Decker Cindy Decker Ted Decker Ted Decker	Yes Cabin Preference Alexis Decker Utth Dad Alexis Decker With Noah Decker With Noah Decker	Group	v v v t's Group

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.

t List Warning			
Rock Solid Church			
Summer Camp 2016			
Home / Calendar / Summer Camp 2016			
Registration Full This Registration has reached it's capacity. Complete	the registration below to be added to the waitlist.		
How mar	ny registrants will you b	oe registerin	g?
	- 1 +		_
			Next
Powered by: Rock RMS			3120 W Cholla St Phoenix, AZ 8502

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.

ait List Warning (Partial)								
Rock Solid Church								
Summer Camp 2016								
Home / Calendar / Summer Camp 2016								
Registration Full This registration only has capacity for 1 more registrant. waitlist.	The first registrant you	add will be regis	tered for Sun	nmer Cam	ıp 2016. ⁻	The remaining	ı registrant will	be added to the
How many	registrar	nts will	you k	be re	egis	tering	?	
	-	2	+					
								Next
Powered by: Rock RMS							3120 W Cholla	

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.

gistrant Screen				
Rock Solid Church	New Here? Resources Con	nect Give Blog	Calendar Watch	Hello Alisha 👻
Summer Camp 2016				
Home / Calendar / Summer Camp 2016				
First Registrant				
This registrant will be fully registered.				
First Name *				
Jen				à
Last Name ®				
Fish				
Birthday •				
Gender*				¥
Leader Preference				•
Cindy Decker				
Cabin Preference *				
Eagle				
Food Allergies				
Additional Options Camp Shirt				
Previous				Next
Powered by: Rock RMS			0400.11/ 01-1	la St Phoenix, AZ 85029

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

Group Member Entry Fields

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

Wait List Screen

Summer Camp 2016					
Home / Calendar / Summer Camp 2016					
Second Registrant					
This registrant will be on the waiting list					
Individual is in the same family as $^{\circ}$					
Jen Fish					
None of the above					
First Name •					
Lynn					
Last Name *					
Sykes					
Birthday *					
Jun • / 18 • / 2000 •					
Gender *					
Female					¥
Previous					Next
Powered by: Rock RMS				3120 W Cholla St	Phoenix, AZ 85029

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

Summer Camp 2016			
Home / Calendar / Summer Camp 2016			
Review Registration			
This Registration Was Completed By			
First Name		Last Name *	
Alisha	A	Marble	
Send Confirmation Emails To •		Alisha is in the same family as •	
alish@rocksolidchurchdemo.com		Jen Fish O Lynn Sykes Nor	ne
Payment Summary			
			Discount Code
			Apply
Description			Amount
Jen Fish			\$ 200.00
Lynn Sykes (Waiting List) 🔅			\$ 0.00
Total			\$ 200.00
			Total Cos
			\$200.00
			Minimum Due Today \$100.00
			Amount To Pay Today
			\$ 200.00
			Amount Remaining \$0.00
Payment Method			
Credit Card #			
VISA 🔤 💼 🔤			
Expiration Date		Card Security Code	
•/			
Previous			Finish
			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

Rock Solid Church	New Here?	Resources	Connect	Give	Blog	Calendar	Watch	Hello Alisha 👻
Summer Camp 207	6							
Home / Calendar / Summer Camp 2016								
Congratulations Ali	sha							
You have successfully registered the following re-	gistrant for Summer Camp 2016:							
• Jen Fish - \$200.00								
You have successfully added the following regis	rant to the waiting list for Summer	Camp 2016:						
 Lynn Sykes 								
Total Cost: \$200.00 Paid \$200.00 on 11/17/2016 (Acct#: ************************************	1, Ref#: T20161117111516883)							
A confirmation email has been sent to alish@roo	ksolidchurchdemo.com. If you hav	e any questions	please conta	ict Jenny I	Michaels	at jenny@rocl	ksolidchurchder	no.com.
Make Payments Even Easier								
Save account information for future trans	actions							
Powered by: Rock RMS						3	3120 W Cholla S	t Phoenix, AZ 8502

Wait List Confirmation Email

Registration 0 Camp 2016	Confirmation: Summer
The following registrant has b	been registered for Summer Camp 2016:
• Jen Fish - \$200.00	
The following registrant has b	been added to the wait list for Summer Camp 2016:
Lynn Sykes	
Total Cost: \$200.00 Paid \$200.00 on 11/17/2016 Balance Due: \$0.00	(Acct #: ************1111, Ref #: T20161117111516883)
Looking forward to seeing yo	u at camp this year!
f you have any questions ple enny@rocksolidchurchdemo	ase contact Jenny Michaels at .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.

Γ٩R	egistration Inst	tance					
	me / Summer Camp /						
s	ummer Camp	Summer Camp 2016	Registration Registran	t			
D 9	Summer Camp 201	16				Summ	er Camp
Nar	me nmer Camp 2016		Acco	unt t Registration			
				Chegos a door			
Max 5	ximum Attendees						
						Send Payment I	Reminde
E	dit Delete						
		-				,	
	dit Delete istrations Registrar	nts Payments Linkaį	ges Wait List				
Reg		nts Payments Linkaį	ges Wait List				
Reg	istrations Registrar	nts Payments Linkaş	ges Wait List				
Reg	istrations Registrar	nts Payments Linkag	ges Walt List	Discount Code	Total Cost		
Reg	istrations Registrar			Discount Code	Total Cost	Fi	ter Options
Reg	Istrations Registrar	Registrants Jen Fish	When	Discount Code		Ri Balance Due	ter Options
Reg	Registrations Registered By Marble, Alisha	Registrants Jen Fish Lynn Sykes w.	When 11/17/2016 11:15 AM	Discount Code	\$200.00	Fil Balance Due	ter Options
Reg	Registrations Registrations Registered By Marble, Alisha Admin, Alisha	Registrants Jen Fish Lynn Sykes (M) (*) Alexis Decker Katte Franks Noah Decker Peter Marshall	When 11/17/2016 11:15 AM 11/17/2016 11:00 AM		\$200.00	Fill Balance Due	ter Options
	Registrations Registered By Marble, Alisha Admin, Alisha Admin, Alisha	Registrants Jen Fish Lynn Sykes (M) (*) Alexis Decker Katte Franks Noah Decker Peter Marshall	When 11/17/2016 11:15 AM 11/17/2016 11:00 AM		\$200.00	Balance Due 8000 9000 <td>ter Options</td>	ter Options
	Registrations Registered By Marble, Alisha Admin, Alisha Admin, Alisha	Registrants Jen Fish Lynn Sykes (M) (*) Alexis Decker Katte Franks Noah Decker Peter Marshall	When 11/17/2016 11:15 AM 11/17/2016 11:00 AM		\$200.00 \$600.00 \$100.00	Balance Due 8000 9000 <td>ter Options</td>	ter Options

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.

1			Q	Search 🗸 🧑 Hello Alish
A Hom	egistration Instance ne / Summer Camp / Summer Camp 2016 mmer Camp Summer Camp 2016	Registrant Registrant		
	ummer Camp 2016			Summer Camp
Nam	ne imer Camp 2016	Account Event Regi	stration	
Max 5	imum Attendees			
Ed	Delete			
	lit Delete			Send Payment Reminder
		nkages Wait List		Send Payment Reminder
Regis		nkages Wait List		Send Payment Reminder
Regis	strations Registrants Payments Lii	nkages Wait List		Send Payment Reminder
Regis	strations Registrants Payments Lii	nkages Wait List Wait List Individual	Added Datetime	Riter Options 1
Regis	strations Registrants Payments Lii Vait List		Added Datetime	Filter Options %
	Strations Registrants Payments Lii Vait List Wait List Order	Wait List Individual		Filter Options %
Regis	strations Registrants Payments Lii Vait List Wait List Order	Wait List Individual		Filter Options %
Regis	Strations Registrants Payments Lin Vait List Wait List Order 1 500 5,000 1 Wat List Individual	Wait List Individual		Filter Options N 5:16 AM
Regis	Strations Registrants Payments Lin Vait List Wait List Order 1 500 5,000 1 Wat List Individual	Wait List Individual		Filter Options N 5:16 AM

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

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

Wait	List Move Confirmation			
Ŷ		Q	Search 👻	🕼 Hello Alisha 🕶
2	₩ Wait List # Home / Summer Camp / Summer Camp 2016 / Wait List			
0	🖄 Wait List Confirmation			
Æ	Wait List Updated 1 individual was moved from the wait list.			
	Send email to individuals			
	Crafted by the Spark Development Network / License			

Wait List Move Email

		٩	Search 👻	Hello Alisha
	₩ Wait List # Home / Summer Camp / Summer	Camp 2016 / Wait List		
,	🛱 Wait List Confirmation			
	Wait List Updated 1 individual wa	s moved from the wait list.		
	Send email to individuals			
	Recipients Alisha Marble (alish@rocksolidchi Registrants: Lynn Sykes	urcindemo.com)		
	From Name •			
	Jenny Michaels	W 2		
	From Email •			
	jenny@rocksolidchurchdemo.co	m		
	Subject • Summer Camp 2016 Wait List U			
		Kock Solid Church		
		Summer Camp 2016 Walt List Update		
		Summer Camp 2016 Wait List Update Alisha, the following individuals have been moved from the Summer Camp 2016 wait list to a full registrant.		
		Alisha, the following individuals have been moved from the Summer Camp 2016 wait list to a full registrant. • Lynn Sykes		
		Alisha, the following individuals have been moved from the Summer Camp 2016 wait list to a full registrant.		
		Alisha, the following individuals have been moved from the Summer Camp 2016 walt list to a full registrant. • Lynn Sykes Addition information is needed in order to process this registration. Please visit the		
		Alisha, the following individuals have been moved from the Summer Camp 2016 wait list to a full registrant. • Lynn Sykes Addition information is needed in order to process this registration. Please visit the online registration page to complete the registration. A balance of \$200.00 remains on this regisitration. You can complete the payment for this		
		Alisha, the following individuals have been moved from the Summer Camp 2016 wait list to a full registrant. • Lynn Sykes Addition information is needed in order to process this registration. Please visit the online registration page to complete the registration. A balance of \$200.00 remains on this registration. You can complete the payment for this registration using our online registration page.		
	Send	Alisha, the following individuals have been moved from the Summer Camp 2016 walt list to a full registrant. • Lynn Sykes Addition information is needed in order to process this registration. Please visit the online registration page to complete the registration. A balance of \$200.00 remains on this registration. You can complete the payment for this registration using our online registration page. If you have any questions please contact at jenny@rocksolidchurchdemo.com.		·
	Send	Alisha, the following individuals have been moved from the Summer Camp 2016 walt list to a full registrant. • Lynn Sykes Addition information is needed in order to process this registration. Please visit the online registration page to complete the registration. A balance of \$200.00 remains on this registration. You can complete the payment for this registration using our online registration page. If you have any questions please contact at jenny@rocksolidchurchdemo.com.		·
	Send	Alisha, the following individuals have been moved from the Summer Camp 2016 walt list to a full registrant. • Lynn Sykes Addition information is needed in order to process this registration. Please visit the online registration page to complete the registration. A balance of \$200.00 remains on this registration. You can complete the payment for this registration using our online registration page. If you have any questions please contact at jenny@rocksolidchurchdemo.com.		*

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

Registration Payment Reminders

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

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

Manual Reminders

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

Registration Ins	stance				
	on / Summer Camp 2015				
•					
Summer Camp	Summer Camp 2015 Regi	stration Registrant			
Summer camp	Summer camp 2015 Reg.	Subton Regardin			
🗅 Summer Camp 20	115				Summer Ca
	/15				Summer C
Name		Account			
Summer Camp 2015		Event Registration			
Maximum Attendees					
200 Attendees					
200					
200					
Edit Delete				🛞 Send Payn	nent Rer
				😵 Send Payn	nent Re
Edit Delete				😢 Send Payn	nent Rei
_	ants Payments Linkages			😢 Send Payn	nent Rer
Edit Delete Registrations Registra	ants Payments Linkages			Send Payn	nent Rer
Edit Delete	ants Payments Linkages			Send Paym	nent Rer
Edit Delete Registrations Registra	ants Payments Linkages			Send Paym	nent Rer
Edit Delete Registrations Registrat		When	Total Cost		
Edit Delete Registrations Registra	ants Payments Linkages	When	Total Cost	Send Paym	
Edit Delete Registrations Registrat		When 2/25/2016 2:17 PM	Total Cost	Balance Due	
Edit Delete Registrations Registra Registrations Registered By	Registrants Bobby Thompson Brian Jones			Balance Due	Filter
Edit Delete Registrations Registra Registrations Registered By	Registrants Bobby Thompson			Balance Due	Filter
Edit Delete Registrations Registrations Registered By Simmons, Sarah	Registrants Bobby Thompson Brian Jones Joey Thompson	2/25/2016 2:17 PM	\$600.00	Balance Due	Filter
Edit Delete Registrations Registra Registrations Registered By	Registrants Bobby Thompson Brian Jones			Balance Due	Filter

Once you click the <u>send Payment Reminder</u> link you'll see the page below. This page allows you to customize the reminder text and who should receive the email.

				Q		Name -	Hello Alis
	yment Remind		ance / Payment Reminders				
minioni	/ Event Registration /	New Registration inst	ance / Payment Reminders				
<u></u> Ω Se	nd Payment Remi	nder					
From	Name •						
Jenn	y Michaels						
From	Email •						
jenn	y@rocksolidchurchden	no.com					
Subjec	t •						
Sum	mer Camp 2015 Payme	ent Reminder					3
Messa	ge						Preview Sour
2		∕ ₹RΩ	ICK				
		Regis	tration Payment Re	minder			
			tion for Summer Camp 2015 has a rem		he		
			or this Registration are below.				
		 Noah Alexis 					
		Katie					
			nplete the payment for this registration u		age.		
		If you have a	any questions please contact at jenny@	rocksolidchurchdemo.com.			
			Cc	ontact Info:			
Outs	anding Balances						
			nces. Individuals who have not been re greyed out. They can be still be includ				hose who have
			greyed out mey can be sumbe melad		or selecting an		
	Name	Date Regsitered	Email	Last Reminder Sent	Cost	Amount Paid	Balance Due
1							
	Greggs, Lorraine	1/12/2016	lgregs@fakeinbox.com	32 days	\$400.00	\$200.00	\$200.0
							11 (2
Send	Reminders 5						

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

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

Automatic Reminders

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

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

Registration Group Placements

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

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

Placement

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

3			Q	Search + 🕢 🕢 Hel
Registration Insta Home / Summer Camp / S				
Summer Camp S	Summer Camp 2015 Registra	ation Registrant		
C Summer Camp 201	5			Summer C
Name Summer Camp 2015		Account Event Regi	stration	
Edit Delete				Send Payment Remi
Registrations Registran	ts Payments Linkages G	iroup Placement		
% Group Placement				
o droup riacement				Filter C
Parent Group		Set Group	Member Attributes 🚱	
Parent Group	- ×	Set Group 🗹 Yes	Member Attributes 📀	
	✓ X Leader Preference		Member Attributes 📀 Group	
🖀 Camp Groups		Yes		•
 Camp Groups Registrant 	Leader Preference	Yes Cabin Preference	Group	•
 Camp Groups Registrant Decker, Alexis 	Leader Preference Cindy Decker	Yes Cabin Preference Alexis Decker	Group	
 Camp Groups Registrant Decker, Alexis Decker, Noah 	Leader Preference Cindy Decker Ted Decker	Yes Cabin Preference Alexis Decker With Dad	Group	•
Year Groups Registrant Decker, Alexis Decker, Noah Franks, Katie	Leader Preference Cindy Decker Ted Decker Cindy Decker	Cabin Preference Alexis Decker With Dad Alexis Decker	Group 중 문	• •
Camp Groups Registrant Decker, Alexis Decker, Noah Franks, Katle Jones, Brian	Leader Preference Cindy Decker Ted Decker Cindy Decker Ted Decker	Yes Cabin Preference Alexis Decker With Dad Alexis Decker With Noah Decker	Group 설 설 설 설 설 설 설 역 (해성 Decker's Grou	• •
Camp Groups Registrant Decker, Alexis Decker, Noah Franks, Katle Jones, Brian Thompson, Bobby	Leader Preference Cindy Decker Ted Decker Cindy Decker Ted Decker Ted Decker	 ✓ Yes Cabin Preference Alexis Decker With Dad Alexis Decker With Noah Decker With Noah Decker 	Group 설 설 설 설 설 설 설 역 (해성 Decker's Grou	• •
Year Camp Groups Registrant Decker, Alexis Decker, Alexis Decker, Alexis Decker, Noah Franks, Katle Jones, Brian Thompson, Bobby Thompson, Joey Thompson, Joey	Leader Preference Cindy Decker Ted Decker Cindy Decker Ted Decker Ted Decker	 ✓ Yes Cabin Preference Alexis Decker With Dad Alexis Decker With Noah Decker With Noah Decker 	Group 설 설 설 설 설 설 설 역 (해성 Decker's Grou	• •

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

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

Note the Set Group Member Attributes checkbox above the registrant list. This option allows you to copy registrant attribute values to the group member attribute values if both have the same key. For example, say your summer camp registration has a registrant attribute value for shirt size, and that attribute's key is "shirtsize". If your cabin groups also have a shirt size attribute with the key "shirtsize", when you process group placements with the Set Group Member Attributes option checked, the shirt size values of the registrants will be copied over to the groups they are placed in.

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

the groups.

You Can Place In More Than One Group

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

Registration Finances

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

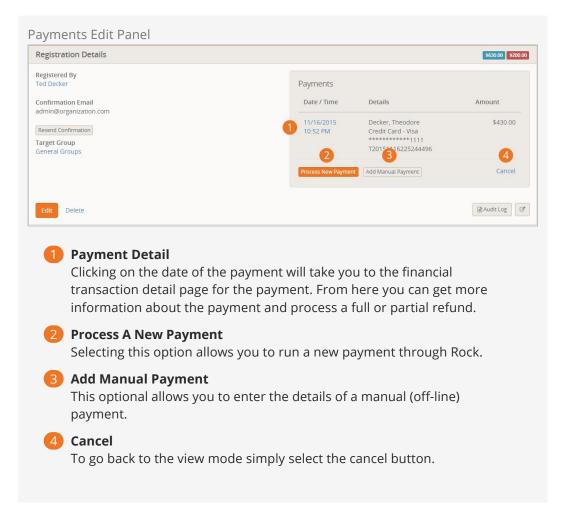
Adding Payments

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

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

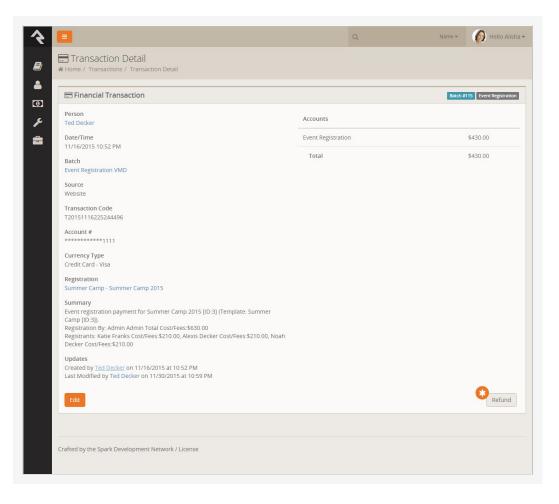
Registration		
Home / Summer Camp / Summer Camp 2015 / Registration		
Summer Camp Summer Camp 2015 Ted Decker	Registrant	
Summer Camp Summer Camp 2015 Ted Decker	Registrant	
Registration Details		\$630.00
Registered By		
Ted Decker	Cost Summary	
Confirmation Email	Description	Amou
admin@organization.com	Katie Franks	\$ 200
	Camp Shirt-Small (1 @ \$10.00)	\$ 10
Resend Confirmation	Alexis Decker	\$ 200
Target Group	Camp Shirt-Small (1 @ \$10.00)	\$ 10
General Groups	Noah Decker Camp Shirt-Medium (1 @ \$10.00)	\$ 200 \$ 10
	Total	\$ 630
	Total	9 000
		Total C
		\$630
		р
		\$430
		Amount Remain
		\$200
		View/Edit Payment
		wiew/Euit Payment

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



Refunds

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



Clicking the Refund button will show the refund modal below.

Payments Edit Panel

Payments Eult Panel	
Refund	×
Amount * 1 \$ \$430.00	Reason* 2
Summary 3	
Process refund through financial gateway	
	Save Cancel

1 Amount

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

2 Refund Reason

This dropdown allows you to pick from a standard set of refund reasons. You can modify this list under Admin Tools > General Settings > Defined Types > Refund Reasons

3 Sumary

This field allows you to enter specific notes about the refund.

4 Process Refund Through Gateway

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

Partial Payments

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

Reminder Emails

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

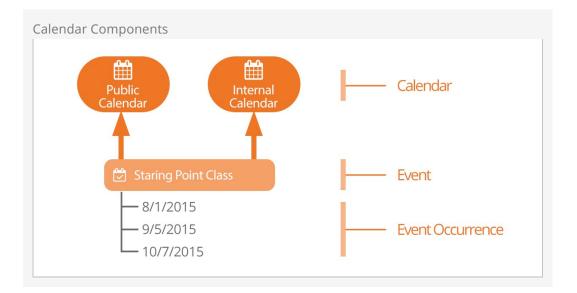
Recent Registration Block

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

Rock Solid Church		New Here? Resources	Connect	Give Bl	og Calendar	Hello Ted 🛩
My Account						
P	Ted Decker ted@rocksoliddemochurch.com Male	(623) 555-3322 Home (623) 555-3322 Mobile			Account Info Change Password	
E	38 yrs old (2/10)	(623) 555-2444 Work (623) 555-2444 Work Home Address 11624 N 31st Dr Phoenix, AZ 85029			Groups Ushers (Member)	
		Phoenix, A2 63029			Decker Group (Leade	r *)
					Recent Registrations	5
					Summer Camp 2015	5
Powered by: Rock RMS					3120 W Cholla St	Phoenix, AZ 8502

Calendars

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



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

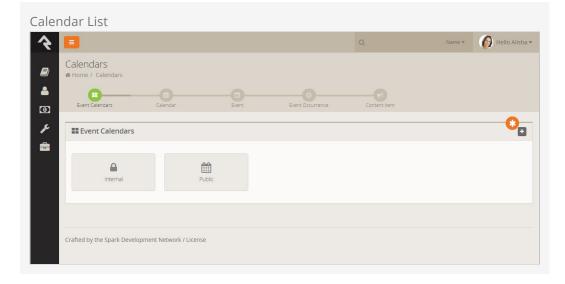
Event Calendars

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

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

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

Events Can Be Placed On More Than One Calendar: Sometimes you'll have an event that should be displayed on more than one calendar. Rock supports this. An event can be on any number of calendars you'd like.



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

lend	lar Details					
5 📘	3			۹	Name +	Hello Alish
	Event Calendar					
-	Home / Calendars / Public					
0	Event Calendars Public	Event	Event Occurrence	Content Item		
۶	m Public					
•	Name • 1		Active			
	Public		* 2			
	Description A calendar for public events that the churc	ch hosts and promotes.				
•						
	Calendar CSS Class					
	fa fa-calendar					
	Event Attributes					^
	Attribute	Description Field Type	Required	Show in Grid	Allow Search	
6		Boolean				× ×
						0
	Content Channels					^
	Channel					
6	External Website Ads					×
	Service Bulletin					×
						0
	Save					
C	rafted by the Spark Development Network / L	lcense				
	Name					
	The name of the ca	lendar				
2	Active	lar is surrantly s	stive			
	Whether the calence	lar is currently a	ictive.			
3	Description					
	A quick reminder of	what the calen	dar is for a	and how it	should be u	used.
4	Icon CSS Class					
	The Font Awesome	icon class the ca	alendar sh	nould use.		
5	Event Attributes					
	Each calendar can d	define custom a	ttributes a	available to	the events	that
	are on them. This is	where you defi	ne these a	attributes.		

6 Content Channels

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

Calendar Security

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

Events

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

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

				٩	Name +	🚺 Hello
🛱 Event Detail						
	ublic / Summer Camp 201	5				
Event Calendars	Public	Summer Camp 2015	Event Occurrence	Content Item		
🗒 Summer Camp :	2015					Active Not App
Name*			Active 2		Approved 3	
Summer Camp 2015			尚 🗹			
Summary						
	veek-long experience they'll	never forget. There the will	build new friendships whi	ile learning about Jesu	s and God's love.	
4						
Description						
Source B I	U S ;: :: @ 🖬 🕻	Format -				
posuere mi. Praesent id leo ut sem		; porta blandit ante ut dictum. U porta ut tortor non dapibus. Nulla ttis porttitor tortor. nec porta laca	a luctus sem quis sodales eg	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere mi. Praesent id leo ut sem conque. convallis est r Audiences	aliquam sollicitudin. Aliquam p	porta ut tortor non dapibus. Nulla	a luctus sem quis sodales eg	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere mi. Praesent id leo ut sem conque. convallis est e Audiences All Church	aliquam sollicitudin. Aliquam p	porta ut tortor non dapibus. Nulla	a luctus sem quis sodales eg us volutbat a. Nullam tincidur	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere mi. Praesent id leo ut sem conque. convallis est r Audiences	aliquam sollicitudin. Aliquam p	porta ut tortor non dapibus. Nulla	a luctus sem quis sodales eg us volutbat a. Nullam tincidur	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere mi. Praesent id leo ut sem conque.convallis est d Audiences All Church	aliquam sollicitudin. Aliquam p	porta ut tortor non dapibus. Nulla	a luctus sem quis sodales eg us volutbat a. Nullam tincidur	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere ml. Praesent id leo ut sem conque.convallis est e Audiences All Church 6 Children	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere mi. Praesent id leo ut sem conque.convallis est d Audiences All Church	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere mi. Præsent id leo ut sem conoue.convallis est e Audiences All Church 6 Children Additional Calendars	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
posuere ml. Praesent id leo ut sem conoue.convallis est e Audiences All Church 6 Children Additional Calendars (internal	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla
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posuere mi. Præsent id leo ut sem conque. convallis est e Audiences All Church 6 Children Additional Calendars (Internal Details URL (9) (9)	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere ml. Praesent id leo ut sem conque.convallis est e Audiences All Church 6 Children Additional Calendars Minimum General Details URL 9 9 Attribute Values	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere mi. Præsent id leo ut sem conaue. convallis est e Audiences All Church Children Additional Calendars (Internal Details URL (9 Attribute Values	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere mi. Praesent id leo ut sem conoue.convallis est e Audiences All Church 6 Children Additional Calendars internal Details URL @ 9 Attribute Values 10 Public	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere mi. Praesent id leo ut sem conoue.convallis est e Audiences All Church 6 Children Additional Calendars internal Details URL @ 9 Attribute Values 10 Public	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere mi. Praesent id leo ut sem conoue.convallis est e Audiences All Church 6 Children Additional Calendars internal Details URL @ 9 Attribute Values 10 Public	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere ml. Praesent id teo ut sem conque. convallis est e Audiences All Church 6 Children 6 Children 6 Children 10 Details URL @ (9) 10 Public Childcare Provided	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.
posuere ml. Praesent id teo ut sem conque. convallis est e Audiences All Church 6 Children 6 Children 6 Children 10 Details URL @ (9) 10 Public Childcare Provided	i aliquam sollicitudin. Aliquam et. commodo iusto. Mauris mat	porta ut tortor non dapibus. Nulla	Photo	estas. Nulla luctus vener	natis molestie. Suspendiss	e quis nulla at iosum luctus.

🚺 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.

🕖 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.

🧿 Details URL

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

10 Attribute Values

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

Follow An Event

After saving an event you can choose to follow it by selecting tthe $rac{1}{2}$ icon in the upper right corner of the details block. This will add it to the list of followed events on your dashboard.

Event Occurrences

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

Event Instance Edit

Ŷ			Q	Name 🕶	🕼 Hello Alisha 🕶			
	Event Occurrence							
2	# Home / Calendars / Public / Summer Camp 2015 / Event Occurrence							
•	Event Calendars Public Summer Camp 2015 A	Il Campuses	Content Item					
ت عر								
-	O Edit Event Occurrence							
	Campus 1	Contact	2					
		Phone						
	Location Description 3 Camp Humphreys - Flagstaff, AZ	(602) 555-32	245					
	Schedule	Email						
	🛱 Edit Schedule	jenny@rocksolidchurchdemo.com						
	Once at 9/3/2015 12:00:00 AM							
(Summer Camp 2015 - Summer Camp 2015							
	Edit KRemove							
	Occurrence Note							
	B Source B I U S H II C Normal - III II							
	Be sure to signup soon as space is limited							
	body p				4			
	Save Cancel							
	Crafted by the 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 Registration Instance / Group

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

6 Occurrence Note

This note will be shown on the calendar detail screen on the pubic 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 threeweek 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.

t instance De	Elall							
					Q	Search 👻	Pello Ali	isha 🖥
Event Occurrence # Home / Calendars / P		cs Car Show / Evo	opt Occurronco					
a nome / calendars / P			int occurrence					
Event Calendars	Public	Customs & Classics	Car Show	All Campuses	Content Item			
⊙ Event Occurrence	e							
								~
Campus All				Contact Alisha Admin				
Schedule Once at 1/29/2016 12:4	7 AM			Email admin@organizatio	on com			
Edit Delete				admine of Barnzado				
📢 Content Channe	els							
External Website /	Ads						^	
Title	Start	Expire		Priority	Statu	IS		
No Items Found								
						q	• • • 4]
-								
Service Bulletin			Belevite				^	
	Active		Priority		Status			
No Items Found								
							• • • •	
Crafted by the Spark Deve	elopment Network / Licen	ise						

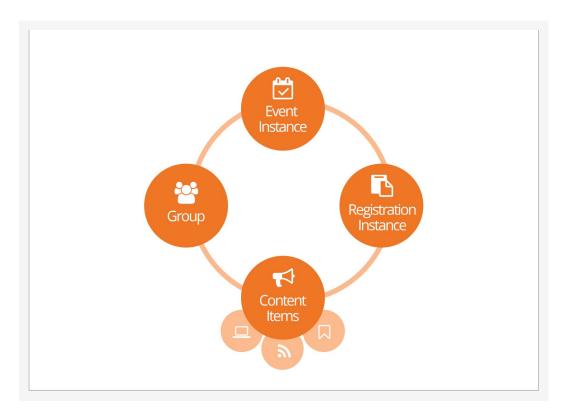
Calendar Blocks

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).

Са												
<		Oct	ober	2015		>	Week Month					
S 27	M 28	T 29	W 30	т 1	F 2	s 3	Rock Solid Fin	ances Class				View Details >
4	5	6	7	8	9	10	Date	Time	Location	Sum	mary	
11 18	12 19		14 21		16 23	17 24	10/28/2015	10:47 PM	All Campuses			
25	26		28 4			31 7	Warrior Youth	Event				View Details >
							Date 10/30/2015	Time 10:47 PM	Location All Campuses	Sum	mary	
							Customs & Cla	assics Car Show				View Details >
							Date 10/31/2015	Time 10:47 PM	Location All Campuses	Sum	mary	

Bringing It All Together

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



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

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

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

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

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

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

Url Slug Required

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

Securing Calendars and Events

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

Securing Calendars

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

Securing Event Registrations

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

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

Event Blocks

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

Calendar Block Calendar Lava

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

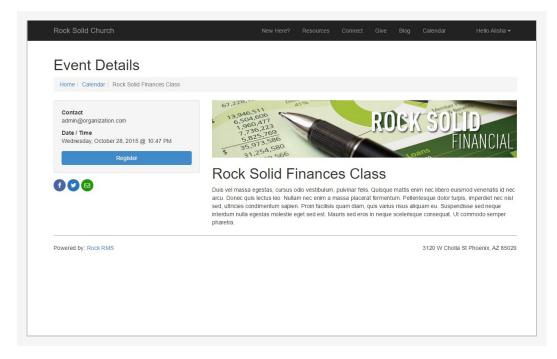
- Event Calendar: The calendar (public, internal, etc.) to pull events from.
- Default View Option: Which view option (day, week or month) to initially show .
- **Details Page:** The page to navigate to, to show the event's details.
- **Campus Filter Display Mode:** Options to show a campus filter (Hidden,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

<		Oct	ober	2015		>	Week Month				
S 27	M 28	T 29	W 30	Т 1	F	S 3	Rock Solid Fir	ances Class			View Details 3
4	5	6 13	7	8 15	9 16	10 17	Date 10/28/2015	Time 10:47 PM	Location	Summary	
11	12		14			24	10/28/2015	10.47 PM	All Campuses		
25			28 4		30 6	31 7	Warrior Youth	Event			View Details
							Date 10/30/2015	Time 10:47 PM	Location All Campuses	Summary	
							Customs & Cla	assics Car Show			View Details
							Date 10/31/2015	Time 10:47 PM	Location All Campuses	Summary	

Event Item Occurence Detail Event Item Occurence Lava

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

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



Event Item Occurence List Event Item Occurence List Lava

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

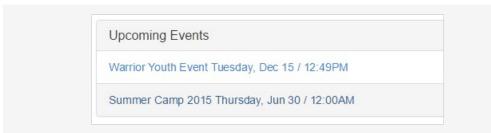
- **Event Item:** The event item to show occurrences for.
- **Campuses:** Which campuses to show occurrences for.
- **Use Campus Content:** Determines whether the campus context should be used to filter the events (assumes that a campus context is in use on your site.)
- **Date Range:** You can filter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

	FER FOR SMS PHOENIX	CAMPU
Saturday,	Jan 16 / 5:45PM	
Sunday, Ja	an 17 / 10:15AM	
Saturday,	Feb 20 / 5:45PM	
Sunday, F	eb 21 / 10:15AM	

Event Item Occurence List By Audience Event Item Occurence List By Audience Lava

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

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



Event Item Personalized RegistrationEvent Item Personalized Registration

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

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

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

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

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

The block requires the following inputs through the URL:

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

?				Q	Name 👻	🚺 Hello Alisha 🕶
Ø	♥ Find Starti	ing Point Profile / Find Starting Point				
≜ 0	Starting Po	pint Registration		c	ampus Phoen	ix 🔻
æ	Select An Upo	coming Starting Point				
		1/6/2016 (Wednesday) Location: Building 4000 Start Time: 6:30 PM	Contact: Alisha Marble alisha@rocksolidchurchdemo.com (620) 555-3332			Phoenix
		1/10/2016 (Sunday) Location: Building 4000 Start Time: 10:30 AM	Contact: Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332			Phoenix
		2/10/2016 (Wednesday) Location: Building 4000 Start Time: 6:30 PM	Contact: Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332			Phoenix
		2/14/2016 (Sunday) Location: Building 4000 Start Time: 10:30 AM	Contact: Alisha Marble alisha@rocksolidchurchdemo.com (602) 555-3332			Phoenix
	Register Ted Decker Start Registation	Cindy Decker Noəh Decker Alexis Dec	Email Reminder Add	iress dchurchdemo.com		
	Crafted by the Spa	rk Development Network / License				