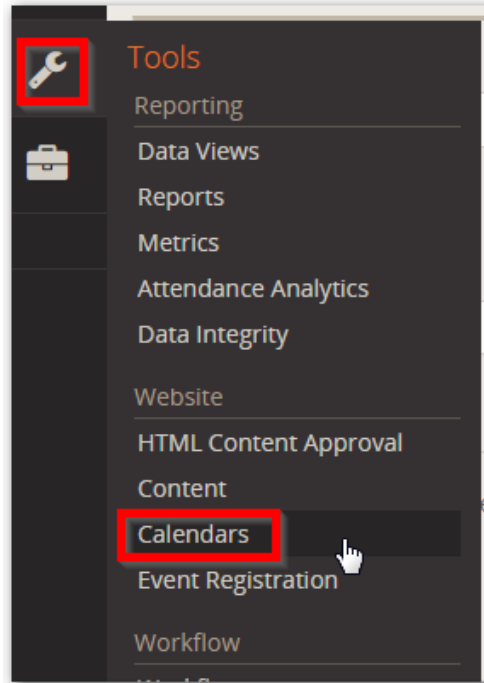


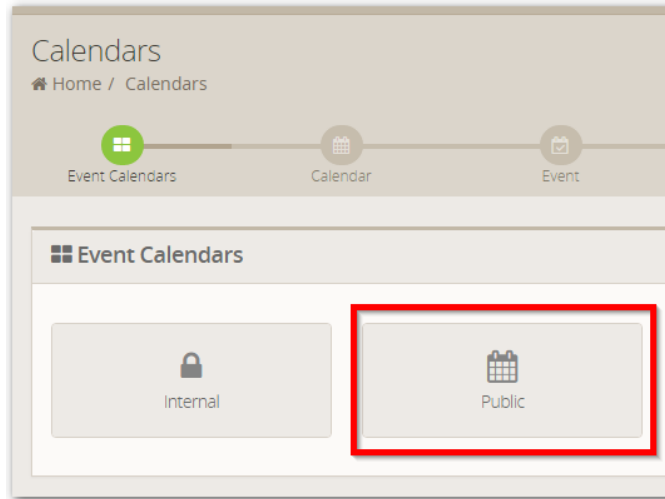
Rock Events Training ([Full Video Training](#))

Creating an event that **WILL NOT** require registration

Click the “**Calendars**” link from the Tools menu.

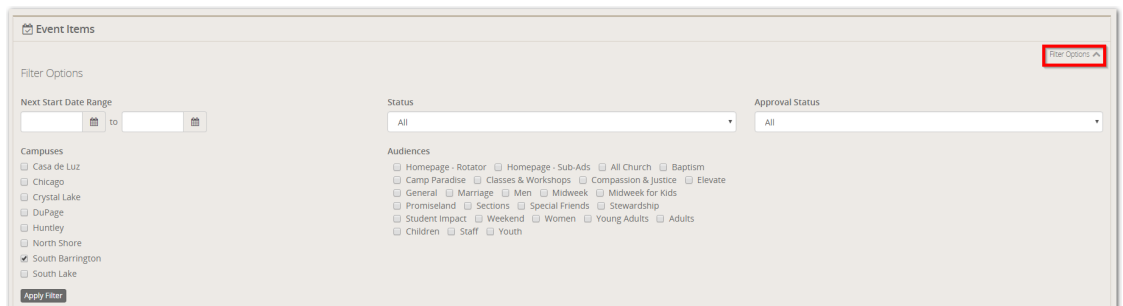


Select “**Public**” from the Event Calendars.

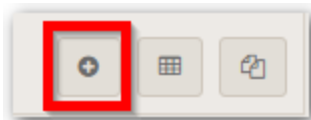


Click on “**Filter Options**” to specify your filter.

Sidenote:
From the Events list page, you can filter by **Date**, **Campus**, **Status**, **Audience**.



Look towards the bottom right corner of the Events list, and click on the **plus** sign to add a new Event.



Step 1: Specify the Event Details

(1). Specify the “**Name**” of your Event. This is what will appear on the public website.

(2),(3). By default the Event should be marked as “**Active**” and “**Approved**” should **NOT** be checked.

(4). Specify a short **Summary** description of the event.

(5). Specify a more complete **Description** of the event that will be displayed on the event detail page. If this is a non-registration event, it may be useful to include somewhere in the description that “*No registration is required*”.

(6). The **Audiences** specification will be used to determine where on the Willow website your event will be posted. You may specify more than one **Audience**.

(7). Upload an optional **Photo** that will be displayed with your event. This image will be displayed on the event details page.

(8). The **Calendars** option should always be marked as “**Public**” unless this is an event that will be marketed internally.

(9). Click “**Save**” once you’ve populated all of the required fields.

The screenshot shows a web form for specifying event details. It includes the following sections and elements:

- Name:** A text input field containing "South Barrington Computer Class".
- Active:** A checkbox that is checked.
- Approved:** A checkbox that is unchecked.
- Summary:** A text area containing "In this class, you will learn the basics features of the Microsoft Office suite of products such as Word, Excel, and PowerPoint."
- Description:** A rich text editor with a toolbar. The content includes an "Agenda to include:" followed by a list of topics: "Create your first Word document", "Custom Margins in Word", "Introduction to Table of Contents", "Track changes", "Work with Word counts in your documents", "Create Labels Footnotes in Word", "Mirror Margins in Word", and "Resumes in Word".
- Audiences:** A section with a "General" audience selected. A red box highlights a plus icon in the bottom right corner.
- Photo:** A section with a placeholder image of a globe and a laptop. A red box highlights the "Upload" button.
- Calendars:** A section with two radio buttons: "Internal" (unchecked) and "Public" (checked).
- Buttons:** "Save" and "Cancel" buttons at the bottom.

Step 2: Specify the Event Occurrence (when the actual event will occur)

You may add a new event occurrence from within the **Event Detail** screen.

South Barrington Computer Class

Summary
In this class, you will learn the basics features of the Microsoft Office suite of products such as Word, Excel, and PowerPoint.

Calendars
Public

Audiences
General

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

Event Occurrences

Campus	Next Start Date	Location	Registration
South Barrington	6/7/2016	A1035	

Look towards the bottom right corner of the **Event Occurrences** list, and click on the **plus sign** to add a new occurrence.



(1). Specify your **Campus**. This will also determine what regional website your event will be posted.

Campus

1 South Barrington

(2). Specify the room **Location Description** of your event.

Location Description

2 A1035

(3). Specify the **Contact** person for this event. This will appear on the public website event details. The phone number and contact email may be edited if needed.

Contact

3 Charlet, Neil

Phone
(224) 512-2342

Email
ncharlet@willowcreek.org

(4).Specify the event **Schedule**. In other words, when and what days will this event occur.

For a **One Time** event, specify the date, time and duration.

For a **Recurring** Event, you have additional options to specify the frequency of the event.

Schedule

4

 Edit Schedule

Monday at 7:00 PM

Schedule Builder

Start Date / Time ?

6/7/2016



7:00 PM



Duration

2

hrs

0

mins

☒ One Time

☐ Recurring

Schedule Builder

Start Date / Time ?

6/7/2016



7:00 PM



Duration

2

hrs

0

mins

☐ One Time

☒ Recurring

Recurrence

Occurrence Pattern

☐ Specific Dates

☐ Daily

☒ Weekly

☐ Monthly

Every

1

week(s)

on

☐ Sun

☒ Mon

☐ Tue

☐ Wed

☐ Thu

☐ Fri

☐ Sat

Continue Until

☐ No End

☐ End by



☒ End after

4

occurrences

Exclusions

06/13/2016



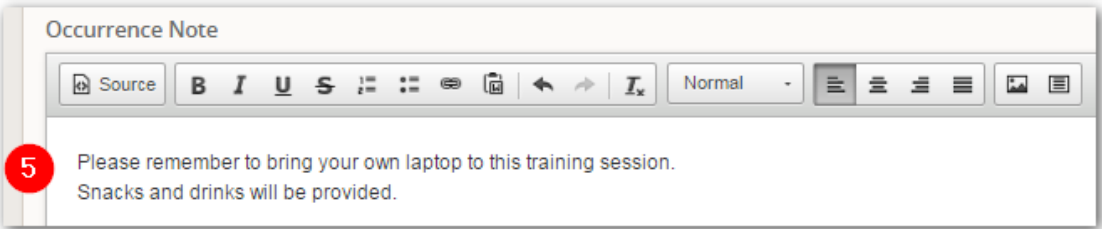
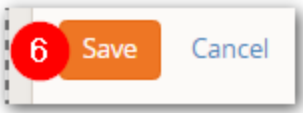
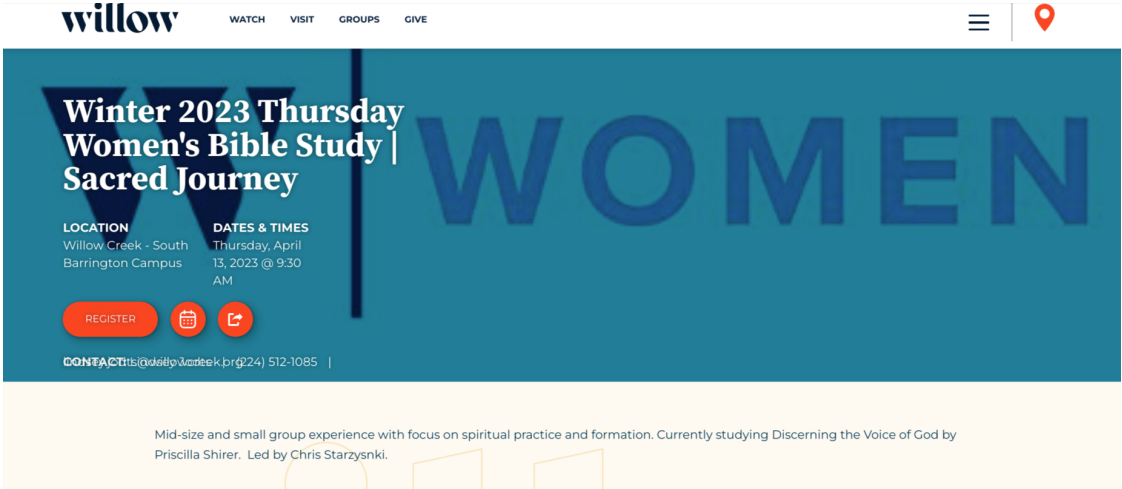
to

06/18/2016



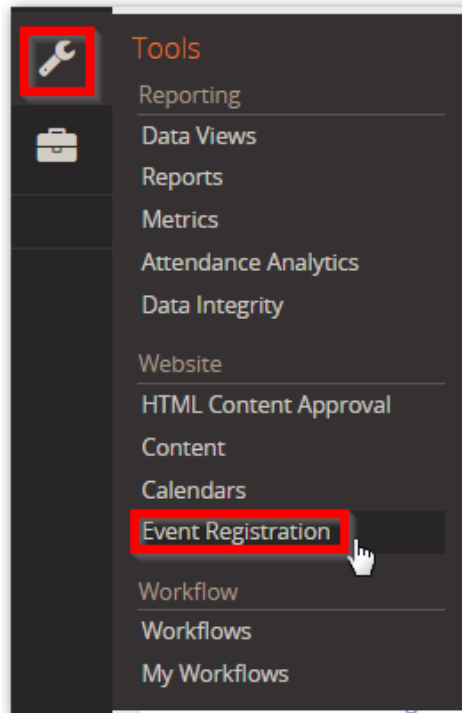
OK

Cancel

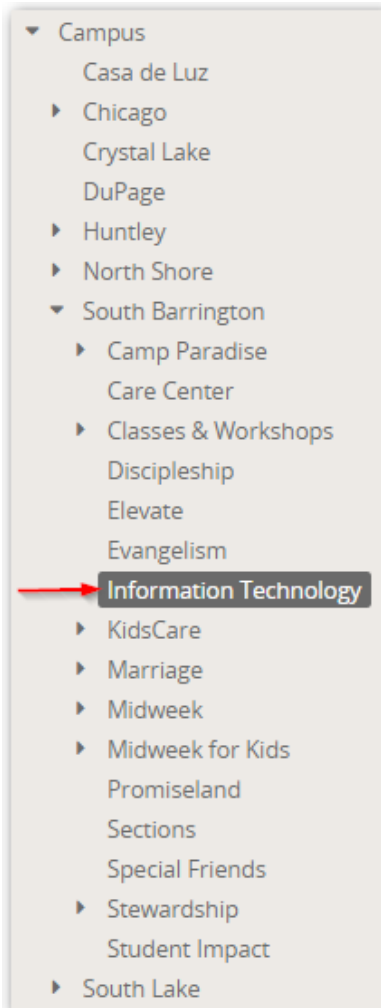
(5). The Occurrence Note will be shown on the event detail screen on the public website. It is used to provide custom notes about the specific occurrence. (6). Click “Save” once you’ve populated all of the required fields.	 
This is an example of how the event may appear on the public website. When you click on the “Register”, button you will directed to the registration page.	
** What’s the main difference between an event that requires NO registration and event that DOES require registrations?	An event that requires NO registration does not utilize a Template nor Instance. This scenario will be covered in the next section of the guide.

Creating an event that WILL require registration

Click the “**Event Registration**” link from the Tools menu.

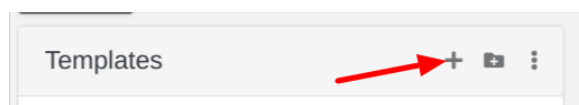


You'll see a “tree” structure in which you can navigate and click on your specific campus and ministry.



Step 1: Create the Registration Template *(Template is a fancy name for the registration form)*

Click the “+” sign to create a new Template.



(1). Specify the **Name** of the Registration Template.

Please preface the name of the template with a three letter abbreviation for your campus (SBR, CLK, HNT, etc etc).

Name *

1 SBR South Barrington Computer Class

(2). Mark the event “Active”.

2 ☒ Active

(3). Specify the **Group Type** as “General Group”.

Group Type

3 General Group

(4).(5). Specify the **Group Member Role** as “Member” and the **Group Member Status** as “Active”.

Group Member Role ?

4 Member

Group Member Status ?

5 Active

(6). (Optional) Check the box to notify the “Registration Contact”. This option notifies the registration contact person anytime there is a new registration.

6 **Notify** ?

☒ Registration Contact

☐ Group Followers

☐ Group Leaders

(7). Leave the box to require a login **unchecked**.

7 **Login Required** ?

☐ Yes

(8). Checking the “Yes” box will allow registrants to login and make updates or changes to their registration **(not currently a feature that is available)**.

8 **Allow External Updates to Saved Registrations**

☒ Yes

(9). When checked “Yes”, registrars and registrants will have a note added to their Rock person record timeline that denotes that they have registered for the event.

9 **Add Person Note** ?

☒ Yes

(10).(Optional) This option allow you to place registrants into a Group within Rock after they register for an event.

(11)(12).(Optional) This option allows users to register multiple registrants. If **“Allow Multiple Registrants”** is checked, you can specify the max number of registrants that a user is allowed to register.

(13). MANDATORY!! Check the **“Ask”** option. Having this option checked will prompt the registrant the question to confirm if the additional registrants are within the same “family”.

(14).(Optional) Check this if you would like a waitlist to be enabled when the maximum number of registrants is reached.

Registrar Options →

****You can set the cost of the event via the Template or Instance.**

(15). Specify the **Cost**, **Minimum Initial Payment**(if desired), **Financial Gateway** and **Batch Prefix**.

Select **“Events - Network Merchants (NMI)”** as the Financial Gateway..

IMPORTANT ----->

Specify your INCOME budget account in which the income from the event will be deposited. The account number should be in this format:

4XXXXX XXX XXX XXX XXXX
(see example in the image)

10 Allow Group Placement
☐ Yes

11 Allow Multiple Registrants
☐ Yes

12 Maximum Registrants ?
10

13 Registrants in same Family
☐ No ☐ Yes ☒ Ask

14 Enable Wait List ?
☐ Yes

Registrar Options ?

Prompt For Registrar
Prompt For Registrar
Pre-fill First Registrant
Use First Registrant

How should the registrar's information be collected?

Prompt For Registrar

Registrar information will be collected at the end.

Pre-fill First Registrant

The first registrant's information will be used to complete the registrar information form but can be changed if needed.

Use First Registrant

The first registrant's information will be used to complete the registrar information form and the form will not be displayed. (If the first registrant's name and email is not provided the registrar information form will still display.)

Set Cost On **15**

Template Instance

Cost ?

\$ 25.00

Minimum Initial Payment ?

\$

Financial Gateway ?

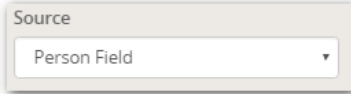
Events - Network Merchants (NMI)

Batch Prefix ?

4XXXXX SBR MIT 001 GENL

Creating the “Form Questions” *(the fields that people fill out when they register)*

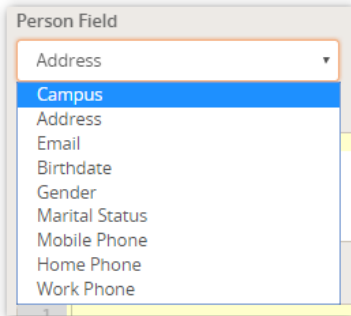
Option 1: Person Field as the Source



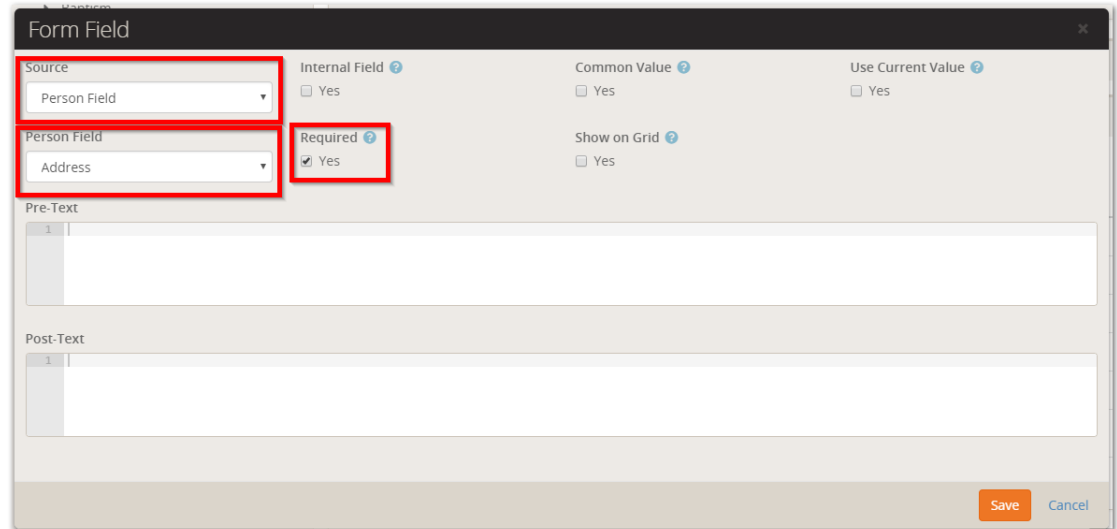
Source
Person Field

Rock defaults to collect the First and Last Name, Email Address, and Date of Birth.

You may add additional **Person Fields** in an effort to collect additional information. These fields will update the person's Rock record when populated.



Person Field
Address
Campus
Address
Email
Birthdate
Gender
Marital Status
Mobile Phone
Home Phone
Work Phone



Form Field

Source: Person Field
Internal Field: ☐ Yes
Common Value: ☐ Yes
Use Current Value: ☐ Yes
Required: ☒ Yes
Show on Grid: ☐ Yes

Pre-Text
1

Post-Text
1

Save Cancel

In this example, I chose the “**Address**” as the additional **Person Field**. You'll notice that I marked this as a “**Required**” field entry.

Here's a more detailed description of the **Form Field** options.

Common Value: Filling out forms can be tedious. This setting allows you to take the entered value from the first registration and auto-populate the same field for the subsequent registrants.

Internal: This setting allows you to define the attribute, but keep it from being displayed on the external registration form. It will be made available however when editing the form internally. This is used for internal fields that will be entered after the registration takes place.

Use Current Value (not utilized): In an effort to reduce the amount of data that must be entered, this setting takes the current value from the registrar's record (if we require login for registration). 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.

You can add an additional form(s) for your event registration. Each form that you create will have its own registration page. Click the “**Add Form**” button towards the lower right corner of the Form(s) box.

Field	Source	Type	Internal	Common	Use Current Value	Required	Show on Grid
First Name	Person Field					✓	✓
Last Name	Person Field					✓	✓
Address	Person Field				✓	✓	

+Add Form

Option 2: Registration Attribute as the Source

Source

Registration Attribute

- Adding a “**Registration Attribute**” will allow you to specify custom questions for your registration form.
- (2). Whatever you populate in the **Name** field will appear as the form field question.
- (3).(Optional) The **Description** field is optional. Entering a brief description here will give event editors a clue as to the relevance of this specific form field.
- (4). Check the box if this is to be a required question.
- (5). Show in Grid will place this attribute on the grid/table of registrants.
- (6). Specify the **Field Type** (See the list below for common **Field Types** and their definition).
- (7).(Optional) Specify the **Pre-Text/Post-Text**. Allows you to surround your entry fields with custom text.
- (8). **SAVE! SAVE! SAVE!**

Form Field

Source: 1 Registration Attribute

Internal Field: ☐ Yes

Common Value: ☐ Yes

Name: 2 Which Office application are you most interested in learning?

Description: 3

Categories:

Key: Which application are you most interested in learning?

Icon CSS Class:

Field Type: 6 Single-Select

Values: Word, Excel, PowerPoint, Publisher, Access, Outlook

Control Type: Drop Down List

Default Value:

Required: 4 ☒ Require a value

Show in Grid: 5 ☒ Yes

Pre-Text: 7

Post-Text:

8 Save Cancel

Conditional Registration Fields

You will need to create a new Form in order for you to have the ability to add registration fields that are linked with conditional logic.

The Form will require at minimum two or more registration fields.

Field	Source	Type	Internal	Common	Use Current Value	Required	Show on Grid	Show on Wait List	
Gender	Registrant Attribute	Single-Select				✓	✓		  
Team Color	Registrant Attribute	Single-Select				✓	✓		  

Click on the filter and configure the logic based on the prior response.

Form Field Filter

Show Team Color if All of the following match:

Gender Is ☒ Male ☐ Female

 Add Criteria

Save Cancel

In this example, the conditional logic will kick in if they choose Male as a response to the prior question. Doing so will then provide them with an additional field to choose a Team Color.

Registration Attributes [\(Video Tutorial\)](#)

Registration attributes allow for the collection of attributes about the registration that do not pertain to a specific registrant.

Attribute	Description	Category	Required	
Childcare Needed			✓	  
Number of Children			✓	  

Common Field Types that you may want to use in your forms

Split Date	Allow the form submitter to specify the date within a three-block field. One block for each date value.
Memo	A larger text field for entering multiple lines of text
Text	A simple line of text
Integer	Stores a whole number (no fractions or decimals).
Multi-Select	Allows you to specify a list of values that multiple items can be selected from. You define the list of values by entering a comma-separated list of items. The items will be displayed as a checkbox list.
Single -Select	Very similar to the multi-select field type but only allow a single value to be selected. The single select field type has the added option of displaying the list as either a radio list or drop-down select.
Boolean	Use this for situations where the options are Yes or No, Done or Not Done.
Connection Opportunities	This field type would allow you to automate a Connection request based on the Connection Opportunity that has been selected <i>(See the Technology Department for additional training before using this field type).</i>

Configuring Optional Fees [\(Video Tutorial\)](#)

There are four types of fees available.

1. Single Option

2. Single Option with Quantity

3. Multiple Options

4. Multiple Options with Quantity

Fees are **OPTIONAL** and in addition to the actual cost of the event. Fees can include supplies, curriculum, t-shirts, books etc, etc. that are required items for the event.

The 'Types of Fees' interface displays four configurations for setting up fees:

- 1 Single Option:** Shows a checkbox next to 'T-Shirt (\$10.00)'.
- 2 Single Option with Quantity:** Shows a text input field with '0' and '+' and '-' buttons next to 'T-shirt (\$10.00)'.
- 3 Multiple Options:** Shows a dropdown menu labeled 'T-Shirt' with options 'S (\$10.00)', 'M (\$15.00)', and 'L (\$20.00)'.
- 4 Multiple Options with Quantity:** Shows three separate input fields with '+' and '-' buttons for 'S (\$10.00)', 'M (\$15.00)', and 'L (\$20.00)'.

(1). Enter the **Name** that will be used for the label that appears above the fee selection.

(2). Will the fee have multiple options?

(3). If checked, will allow the user to specify a quantity.

(4). If checked, will allow a discount to be applied to the Fees. If unchecked, the discount will not be applied to the Fees but will be applied to the cost of the event.

(5). Check the box to make the fee active

(6). If a max available quantity is not specified, it is an unlimited item. Adding a number to this field will show the remaining available items when registering.

The 'FEE EDITOR' interface includes the following fields and controls:

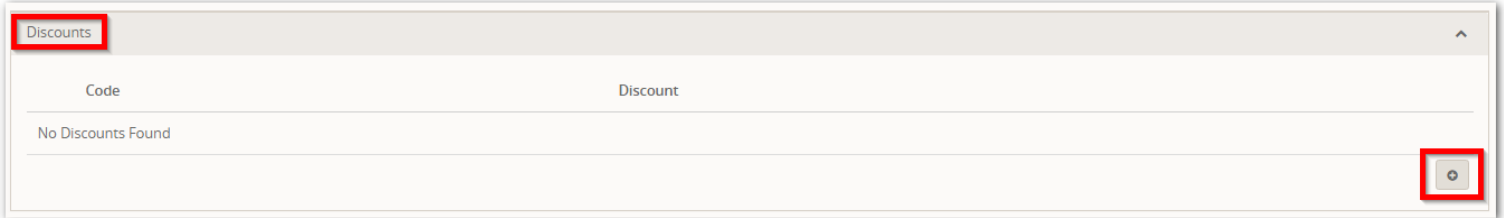
- Name:** A text input field with a red asterisk and a blue circle 1.
- Options:** Radio buttons for 'Single' (selected) and 'Multiple' with a blue circle 2.
- Cost:** A text input field with a dollar sign and '0'.
- Maximum Available:** A text input field with a blue circle 6.
- Enable Quantity:** A checkbox with a blue circle 3.
- Is Required:** A checkbox with a blue circle 4.
- Discount Applies:** A checkbox with a blue circle 5.
- Is Active:** A checkbox with a red checkmark and a blue circle 6.
- Buttons:** 'Save' (orange) and 'Cancel' (grey) buttons at the bottom right.

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

Discounts ([Video Tutorial](#))

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

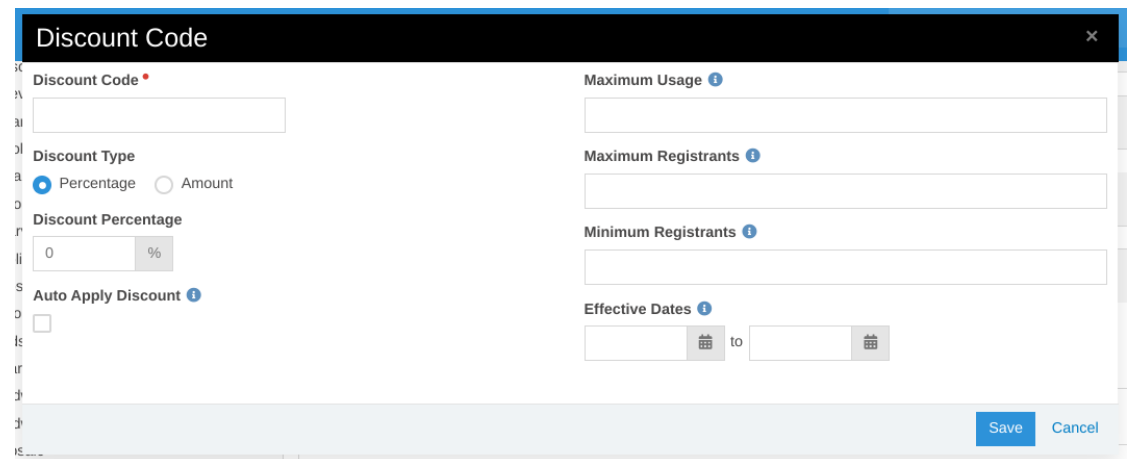
To add an optional **Discount**, click the plus sign located in the lower right-hand corner of the Discounts window.

The screenshot shows a window titled "Discounts" with a search bar and a list of discounts. The list is currently empty, showing "No Discounts Found". A red box highlights a plus sign button in the bottom right corner of the window.

(1). Specify the Name of the **Discount Code**. This is what you would give out to the people registering for the event.

(2). Specify the **Discount Type**(percentage or amount).

(3). Specify the **Discount Percentage or Amount**.

The screenshot shows the "Discount Code" form. It has a title bar with a close button. The form contains several fields: "Discount Code" (text input), "Discount Type" (radio buttons for "Percentage" and "Amount"), "Discount Percentage" (text input with a percentage sign), "Auto Apply Discount" (checkbox), "Maximum Usage" (text input), "Maximum Registrants" (text input), "Minimum Registrants" (text input), and "Effective Dates" (two date pickers with a "to" separator). There are "Save" and "Cancel" buttons at the bottom right.

Discount Code Options:

Maximum Usage --->

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

Maximum and Minimum Registrants --->

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

Auto Apply Discount --->

If this option is selected, Rock will automatically check the registrations against the discount codes available and apply the first discount that matches the criteria.

Effective Date --->

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

Confirmation Email

After completing the registration, you can configure a confirmation email. This email also acts as an emailed receipt. Rock comes with a nice template that should suffice. **Here's what a sample confirmation email will look like.**



WILLOW CREEK
COMMUNITY CHURCH

Registration Confirmation: South Barrington Computer Class March 2019

The following person has been registered for South Barrington Computer Class March 2019:

- Neil Charlet

Additional Confirmation details will be here.

If you have any questions please contact at neilcharlet@gmail.com.

Reminder Email

Rock comes packaged with a default reminder email template. Here's what it will look like. One thing of note here is that the template relies on the registration instance's *Additional Reminder Details* to set when the reminder will occur. We've highlighted this part in the email below.



WILLOW CREEK
COMMUNITY CHURCH

Registration Reminder

Additional Reminder details will be here.

The following person has been registered for South Barrington Computer Class March 2019:

- Neil Charlet

If you have any questions please contact at neilcharlet@gmail.com.

Terms/Text

You can 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/Text

Registration Term

Registration

Fee Term

Additional Options

Registrant Term

Person

Discount Code Term

Discount Code

Summary Text

Summary Text

1 Text to display in the summary page where the Registrar info is collected.

Registration Instructions -

You might find it helpful to include text on the prior page before they start the registration.

Registration Instructions 

These instructions will appear at the beginning of the registration.

Communication Settings

Do Not Send Confirmation Email

☐☐ Show Communication Settings

Confirmation Email

Reminder Email

Payment Reminder Email

Wait List Transition Email

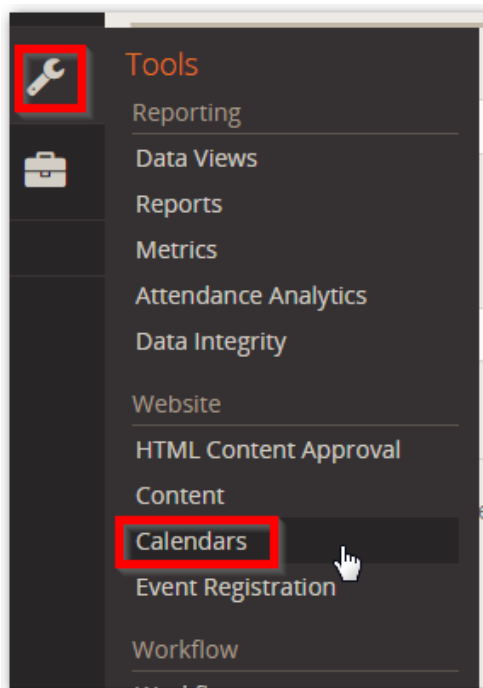
Don't forget to click the **Save** button after you've completed setting up your registration template.

Save

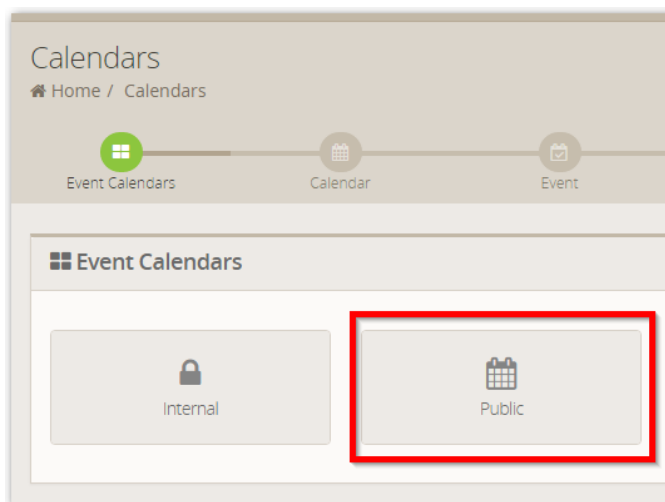
Cancel

Step 2: Create the event on the public calendar

Click the “**Calendars**” link from the Tools menu.



Select “**Public**” from the Event Calendars.



Look towards the bottom right corner of the Events list, and click on the **plus sign** to add a new Event.



Step 2.1: Specify the Event Details

(1). Specify the “**Name**” of your Event. This is what will appear on the public website.

(2),(3). By default the Event should be marked as “**Active**” and “**Approved**” should **NOT** be checked.

(4). Specify a short **Summary** description of the event. This is what will appear on the public website.

(5). Specify a more complete **Description** of the event that will be displayed on the event detail page. If this is a non-registration event, it may be useful to include somewhere in the description that “*No registration is required*”.

(6). The **Audiences** specification will be used to determine where on the site your event will be posted. ****You are allowed to specify more than one Audience.**

(7). Upload an optional **Photo** that will be displayed with your event. This image will be displayed on the event details page.

(8). The **Calendars** option should always be marked as “**Public**”, unless it is an event in which you do not want it to appear on the Willow calendar.

The screenshot shows a web form for creating an event. It includes the following sections and annotations:

- Name:** A text input field containing "South Barrington Computer Class" (Annotation 1).
- Active:** A checkbox that is checked (Annotation 2).
- Approved:** A checkbox that is unchecked (Annotation 3).
- Summary:** A text area containing "In this class, you will learn the basics features of the Microsoft Office suite of products such as Word, Excel, and PowerPoint." (Annotation 4).
- Description:** A rich text editor with a toolbar. The content includes an "Agenda to include:" followed by a list of topics: "Create your first Word document", "Custom Margins in Word", "Introduction to Table of Contents", "Track changes", "Work with Word counts in your documents", "Create Labels Footnotes in Word", "Mirror Margins in Word", and "Resumes in Word" (Annotation 5).
- Audiences:** A section with a "General" audience selected. A red box highlights a plus icon for adding more audiences (Annotation 6).
- Photo:** A section with a placeholder image of a globe and a laptop. A red box highlights the "Upload" button (Annotation 7). A green box next to it states: "Ideal image size should be: 16x9 or 1920 x 1080px".
- Calendars:** A section with a "Public" checkbox checked and an "Internal" checkbox unchecked (Annotation 8).

Event Occurrence
Attributes

You can create specific attributes to assign to event occurrences. For example, you could create a "Lunch Provided?" attribute to use with recurring staff meetings. Then for each meeting assign that attribute a value of "Yes" or "No". As with all attributes, the possibilities are endless and completely customizable for your needs

Event Occurrence Attributes ^

Attribute	Description	Field Type	Required	Show in Grid	Allow Search
☰ Lunch Provided		Boolean		✓	 
					

(9). Click “Save” once you’ve populated all of the required fields.

9

Save

Cancel

Step 2.2: Specify the Event Occurrence (when/where the actual event will occur)

You may add a new event occurrence from within the **Event Detail** screen.

South Barrington Computer Class

Summary
In this class, you will learn the basics features of the Microsoft Office suite of products such as Word, Excel, and PowerPoint.

Calendars
Public

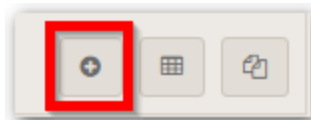
Audiences
General

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

Event Occurrences

Campus	Next Start Date	Location	Registration
South Barrington	6/7/2016	A1035	

Look towards the bottom right corner of the **Event Occurrences** list, and click on the **plus sign** to add a new occurrence.



(1). Specify your **Campus**. This will also determine what regional website your event will be posted.

Campus

1 South Barrington

(2). Specify the room **Location Description** of your event.

Location Description

2 A1035

(3). Specify the **Contact** person for this event. This will appear on the public website event details. The phone number and contact email may be edited manually if needed.

Contact

3 Charlet, Neil

Phone
(224) 512-2342

Email
ncharlet@willowcreek.org

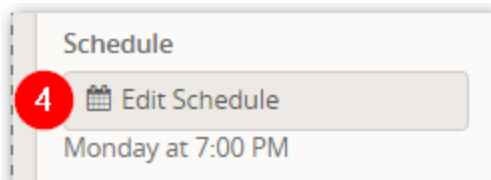
(4). Specify the event **Schedule**. In other words, when and on what days will this event occur.

For a **One Time** event, specify the date, time, and duration.

For a **Recurring Event**, you have additional options to specify the frequency of the Event.

(5). Add a “**New Registration Instance**”.
[\(Video Tutorial\)](#)

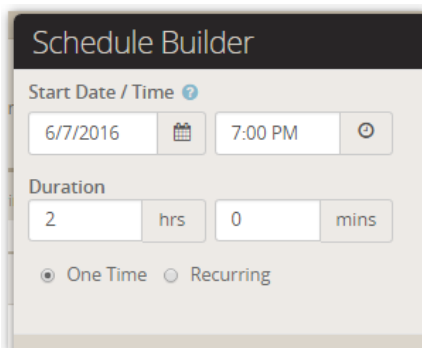
(5.1) Select your “**Registration Template**” from the drop-down list. Choose the template that you made from the previous **Step 1**.



Schedule

4 Edit Schedule

Monday at 7:00 PM



Schedule Builder

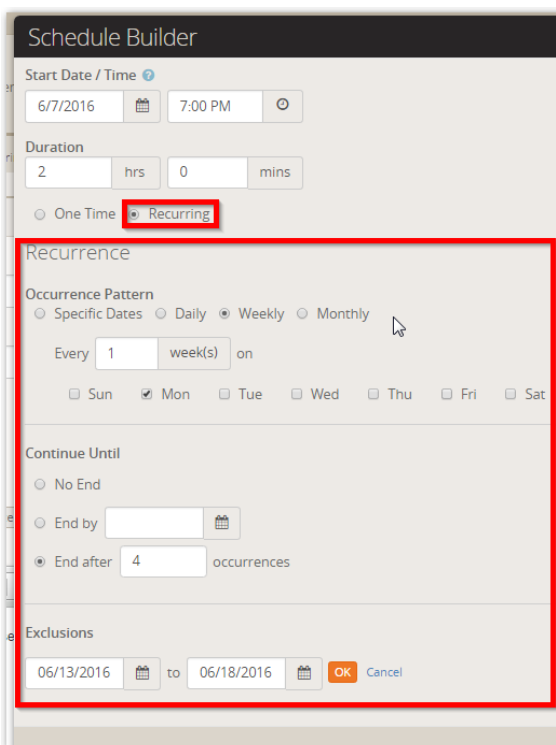
Start Date / Time ?

6/7/2016 7:00 PM

Duration

2 hrs 0 mins

☒ One Time ☐ Recurring



Schedule Builder

Start Date / Time ?

6/7/2016 7:00 PM

Duration

2 hrs 0 mins

☐ One Time ☒ Recurring

Recurrence

Occurrence Pattern

☐ Specific Dates ☐ Daily ☒ Weekly ☐ Monthly

Every 1 week(s) on

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Continue Until

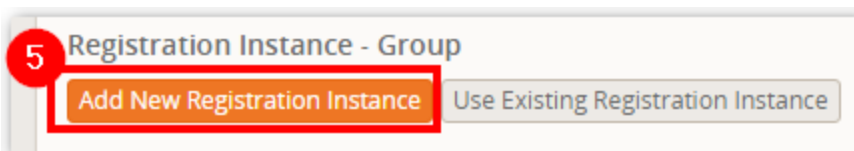
☐ No End

☐ End by

☒ End after 4 occurrences

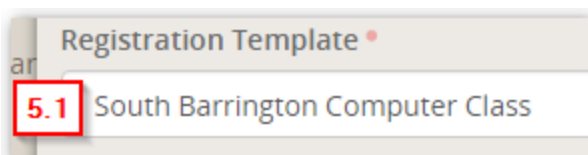
Exclusions

06/13/2016 to 06/18/2016 OK Cancel



5 Registration Instance - Group

Add New Registration Instance Use Existing Registration Instance



Registration Template

5.1 South Barrington Computer Class

(5.2). The **Registration Instance Name** is an important field that will be shown during the registration process. It will be used to describe the event that you are registering for (e.g. *Thank You for Registering for "_____"*). **Also, please include the month and year in the Instance title.**

(5.3). Specify the date and time that the registration starts.

(5.4). Specify the date and time that the registration ends.

(5.5). Specify the max number of people that you will allow to register for the event.

(5.6). **(Optional)** If you specify a Group, all registrants will automatically be placed into the group (***you must create the group prior to creating the instance/event***).

(5.7). The information that should be displayed as the contact for the registration process. You may manually edit the contact phone/email to reflect your contact preference.

Registration Instance Name ? *

5.2 Summer 2016 South Barrington Computer Class

Registration Starts

5.3 06/06/2016 9:00 AM

Registration Ends

5.4 06/10/2016 12:00 AM

Maximum Attendees

5.5 20

Group

5.6

Contact

5.7 Neil Charlet

Contact Phone

(224) 512-2342

Contact Email

ncharlet@willowcreek.org

(5.8). Please leave the default for this setting as “**Event Registration**”.

(5.9).(Optional)Specify the date and time that a reminder should be sent.

(5.10). 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.

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

(5.12). Click **OK** after you've completed all of the required fields.

(6). The **Occurrence Note** will be shown on the calendar detail screen on the public website. It is used to provide custom notes about the specific occurrence.

(7). Click “**Save**” once you've populated all of the required fields.

Account •

5.8  Event Registration ▼

Send Reminder Date

5.9 06/17/2016  12:00 AM 

Additional Reminder Details ?

5.10  Source **B** *I* U ~~S~~       

Don't forget to bring your laptop!

Additional Confirmation Details ?

5.11  Source **B** *I* U ~~S~~       

Looking forward to a fun filled day of learning!

5.12 **OK** Cancel

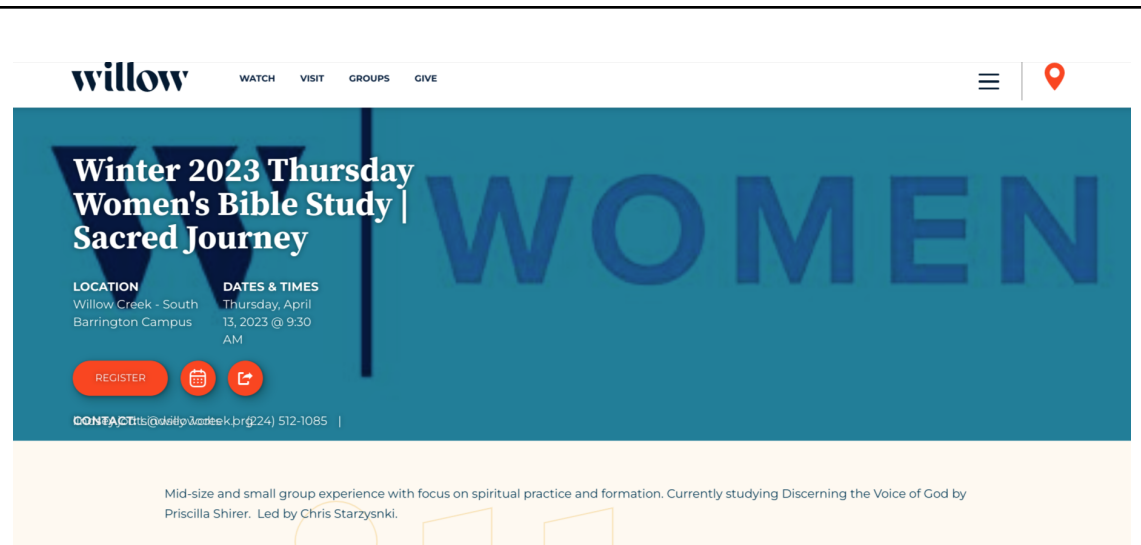
Occurrence Note

6  Source **B** *I* U ~~S~~        Format -

Please remember to bring your own laptop to this training session.
Snacks and drinks will be provided.

7 **Save** Cancel

Event details page.
People will click on the
“Register” button to begin
the registration process.



**After you have completed all of the above steps,
you must submit your event for approval.**

Go to: **service.willowcreek.org** to create a ticket for approval.

Choose "Rock" as the category, and "Event Approval & Configuration" as the subcategory:

Category *

Rock

Subcategory *

Event Approval & Configuration

Additional Detail *

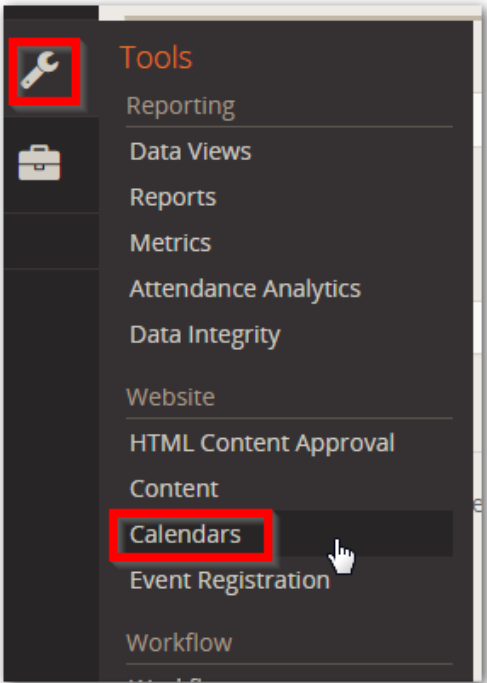
Please include the title of your event



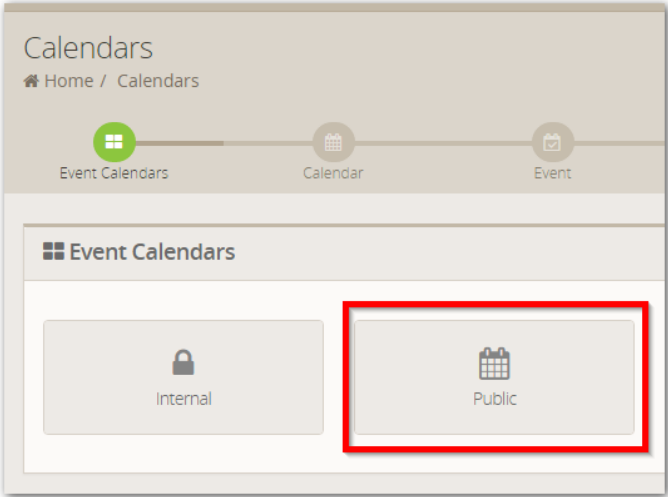
It's very helpful to then include the Title of the Rock event within the box where you would typically write a Description.

After approval, it may take up to 24hrs for the event to appear on the Willow events page.

To edit or manage your event occurrence, click the “Calendars” link from the Tools menu.



Select “Public” from the Event Calendars.



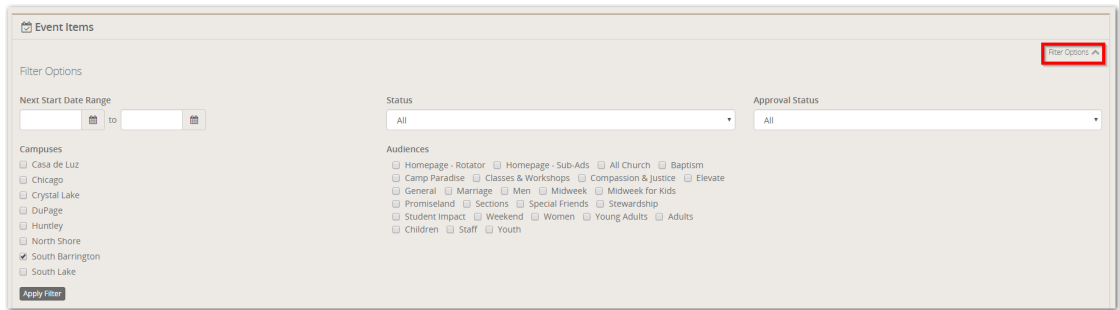
You’ll then see a list of all events.

A screenshot of the 'Event Items' table. The table has two columns: 'Name' and 'Next Start Date'. The 'Event Items' tab at the top is highlighted with a red box.

Name	Next Start Date
"Refresh" Summer Midweek at Willow North Shore	7/14/2016
2016 Men's Reunion Detail	8/10/2016
2016/2017 Awana Kindergarten-Grade 5 Registration	9/14/2016
A Lectio Divina Experience at Huntley	7/13/2016

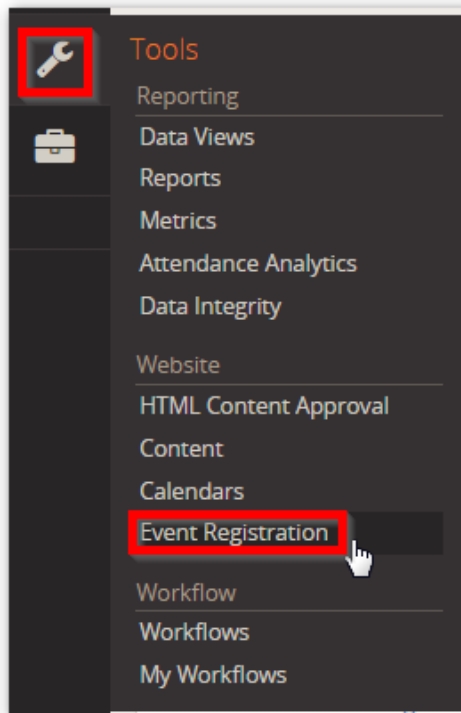
Sidenote:
From the Events list page, you can filter by **Date**, **Campus**, **Status**, and **Audience**.

Click on “Filter Options” to specify your filter.

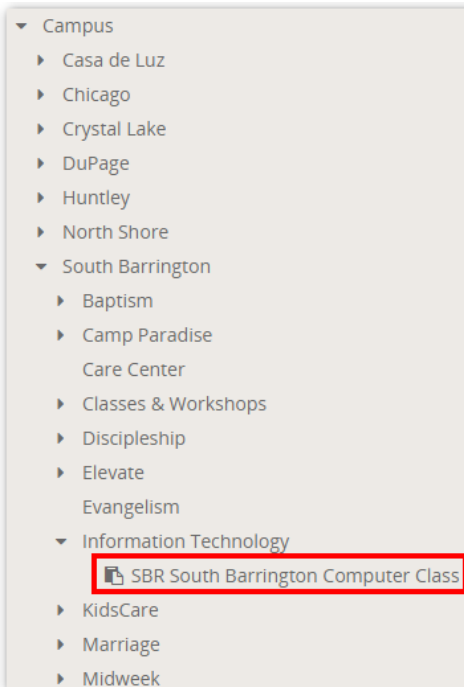


Accessing your event registration roster

Click the “**Event Registration**” link from the Tools menu.



Navigate down and click on the Template of the specified event.



In the **Instances** box, click on the event to see the registration activity.

SBR South Barrington Computer Class Instances						
Filter Options						
Name	Start Date	End Date	Details	Registrants	Active	
SBR Computer class	8/17/2016	8/31/2016		1	✓	✕
Summer 2016 South Barrington Computer Class	6/6/2016	10/31/2016		1	✓	✕

Click the “**Registrations**” tab to view all of the current registrations. Here you’ll see the time/date of when they registered along with the total payment that has been collected and any remaining balance.

Registrations Registrants Payments Linkages			
Registrations			
☐	Registered By	Registrants	When
☐	Charlet, Neil	Neil Charlet	

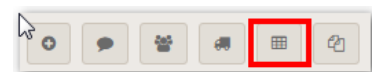
Click the “**Registrants**” tab to view all of the form data(the questions that you’ve asked registrants to populate will appear as column headers). Any question that you’ve specified to “show on the grid” will appear on this table.

Registrations Registrants Payments Linkages				
Registrants				
☐	Registrant	Group	Birthdate	Email
☐	Charlet, Neil			ncharlet@willowcreek.org

Additional Tabs:

Payments
Fees
Discounts
Wait List

Payments	Fees	Discounts	Linkages	Wait List	Group Placement
----------	------	-----------	----------	-----------	-----------------



On both the Registration and Registrants tab, you can click this icon to export your lists to Excel.

Summary of the event creation process

For an Event that requires NO registration

- > Public Calendar
- > Event Detail(what gets displayed on the public Willow website)
- >Occurrence(when/where the event happens)

For an Event that requires registration

- > Template(the form that people fill out)
- > Public Calendar
- > Event Detail(what gets displayed on the public website)
 - >Occurrence(when/where the event happens)
 - >Instance(when the registration begins and is linked to the Template)

Accessing the Public and Internal URLs for your Event

An EASY way to access your Rock Event URLs

Go to this link - <https://rock.willowcreek.org/page/880>

On this page, you can filter by Campus AND by keyword within the “Event Registration” field.

Instance Link	Event Details	Registration Link
---------------	---------------	-------------------

The first three columns will provide you with direct links to the following:

Instance Link = Registrants Grid

Event Details = What the public sees

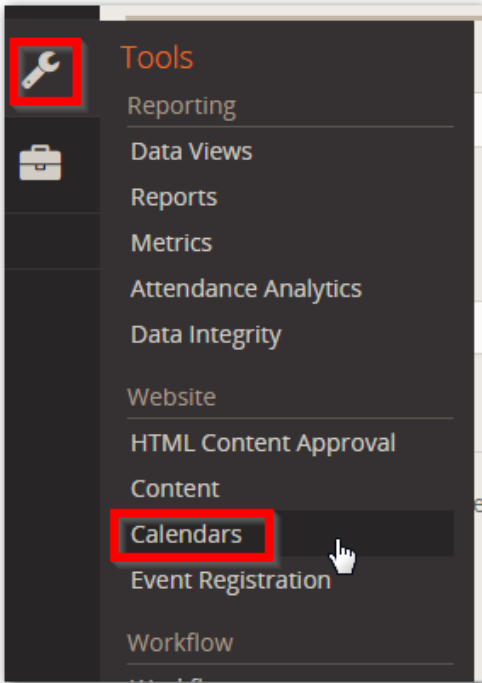
Registration Link = Direct link to the first page of the registration for the event

After you click on the link within the appropriate column, you’ll be able to capture/copy the link.

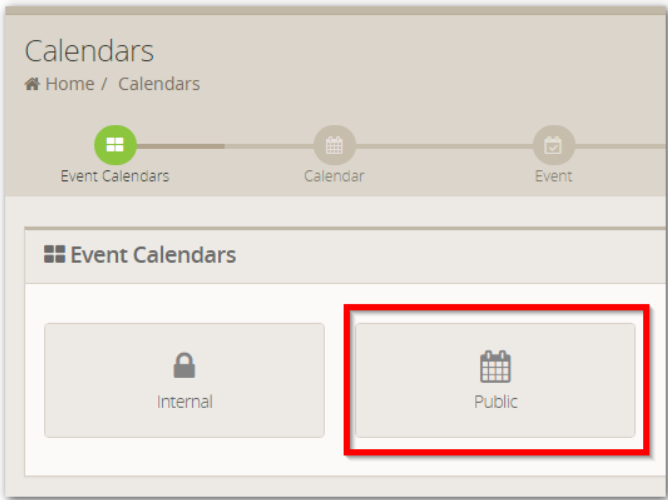
BONUS Material that will come in handy at some point...

Creating a new Occurrence/Instance for your event

Click the “**Calendars**” link from the Tools menu.



Select “**Public**” from the Event Calendars.



Locate and click on your event within the events list.

Public

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

EditDelete

Event Items

Name	Next Start Date	Calendars	Audiences	Occurrences	Status	Approval Status	
"Refresh" Summer Midweek at Willow North Shore	N/A	Public	General Midweek Classes & Workshops	1	Active	Approved	✖
2016 Camp Paradise Men's Reunion	N/A	Public	Camp Paradise	1	Active	Approved	✖
2016/2017 Awana Kindergarten-Grade 5 Registration	1/11/2017	Public	Midweek for Kids Children	1	Active	Approved	✖
3rd - 5th Grade Families of Faith - North Shore	N/A	Public	All Church Youth Children Classes & Workshops Discipleship General Promiseland Weekend	1	Active	Approved	✖
5 Loaves Thanksgiving Family Dinner	N/A	Public	General All Church Compassion & Justice	1	Active	Approved	✖
5th Annual Creek Gallery Fine Arts Exhibition	N/A	Public	All Church General	1	Active	Approved	✖

Click the “Edit” button to make any edits to the event description if needed.

South Barrington Computer Class

Calendars
Internal

EditDelete

W

WILLOW CREEK
INFORMATION TECHNOLOGY

In the Occurrence box, you’ll see the existing (or past) occurrence.

Event Occurrences

Campus	Next Start Date	Location	Registration
South Barrington	N/A	Computer Lab	South Barrington Computer Class (Winter 2016)

50 | 500 | 5,000 | 1 Event Occurrence

If you simply want to create a new occurrence and registration click the “Add” button located towards the bottom right corner of the screen.



Specify the Campus, Location Description, Contact and Schedule.

Add Event Occurrence

Campus
1 South Barrington

Location Description
2 A1000

Schedule
4 Edit Schedule
Once at 1/31/2017 7:00:00 AM

Registration Instance - Group
Add New Registration Instance Use Existing Registration Instance

Occurrence Note

Contact
3 Charlet, Neil

Phone
(224) 512-2342

Email
ncharlet@willowcreek.org

SaveCancel

(You can skip this step if your event does not require registration) Click the “Add New Registration Instance” to specify the new instance details.

Make sure that the appropriate template is selected.

It's helpful to include some date context to the registration instance name.(e.g.Winter 2017, Spring 2017, Jan-Feb 2017, etc etc)

Specify the new start/stop dates for the registration.

Add additional details to the registration instance if needed(e.g. Contact details, reminder details, confirmation details).

Click “Save” once you’re done editing the new occurrence/instance.

The end result is a new occurrence (and in cases where registration is required, you'll have a new instance tied to the occurrence).

Campus	Next Start Date	Location	Registration
South Barrington	1/12/2017	A1000	South Barrington Computer Class (Winter 2016)
South Barrington	4/7/2017	A1000	South Barrington Computer Class (Spring 2017)

50 500 5,000 2 Event Occurrences

Utilizing the Wait List Feature [\(Video Tutorial\)](#)

When in Edit mode on a Template look for the **Wait List** setting within the **Details** section and make sure that the box is checked.

Details

Registration Template Type [?](#)

Event Registration

Group Type

General Group

Group Member Role [?](#)

Member

Group Member Status [?](#)

Active

Allow Multiple Registrants [?](#)

☐ Yes

Registrants in same Family [?](#)

☒ No ☐ Yes ☐ Ask

Enable Wait List [?](#)

☒ Yes

As you craft your Form questions, you can specify which questions you would like to have available when someone tries to register for the waitlist.

Checking the box to have the form question “**show on wait list**” means that only those questions will appear for the registrant to populate.

When you move the registrant off the waitlist, the registrant will get an email confirmation with a link to the registration form in which they will be prompted to complete the remaining required form fields.

Form(s)

Default Form

Field	Source	Type	Internal	Common	Use Current Value	Required	Show on Grid	Show on Wait List	
First Name	Person Field					☒	☒	☒	
Last Name	Person Field					☒	☒	☒	
Email	Person Field					☒	☒	☒	☒
Birthdate	Person Field					☒	☒	☒	☒
Mobile Phone	Person Field							☒	☒
Which Service do you attend?	Registration Attribute	Text							☒
How did you find out about our church?	Registration Attribute	Text							☒
Please select your grade in school:	Registration Attribute	Text							☒

+ Add Form

Specify the **Maximum Attendees** on your event Instance.

Computer Class

Registration Instance Name [?](#) *

Computer Class

Registration Starts

9/9/2017 12:00 AM

Registration Ends

9/30/2017 12:00 AM

Maximum Attendees

25

When your event has reached the maximum capacity, registrants will receive the message that the “**event is currently at full capacity**”.

They will still be able to register and will be placed on the Wait List. They will not be required to make payment until you move them off the waitlist.

WILLOW CREEK
COMMUNITY CHURCH

Computer Class

Resigtrant

This event is currently at full capacity. You will be placed on a waitlist and notified when a spot becomes available.

First Name *

Last Name *

On the Instance, you'll now notice a numeric indicator for the people on your waitlist.

SBR South Barrington Computer Class Instances

Name	Start Date	End Date	Details	Registrants	Wait List	Active	
Computer Class	9/9/2017	9/30/2017		3	2	✓	✕

50 500 5,000 1 Instance

Click on your Instance to access your registrants' grid. People that are on the waitlist, will have this indicator.



Registered By	Email	Mobile	Registrants	When
Volunteer, Vicki	ncharlet@willowcreek.org	(123) 456-7890	Vicki Volunteer WL	9/9/2017 7:35 PM
Charlet, Neil	ncharlet@willowcreek.org	(224) 633-6336	Neil Charlet WL	9/9/2017 7:33 PM
Recio Moreno, Jorge	jrecio@willowcreek.org	(847) 219-1383	Jorge Recio Moreno	8/22/2017 10:49 AM

To move someone off the waitlist, click on the **Wait List** tab and select the person then click the **Move From Wait List** button.

Registrations Registrants Payments Linkages **Wait List**

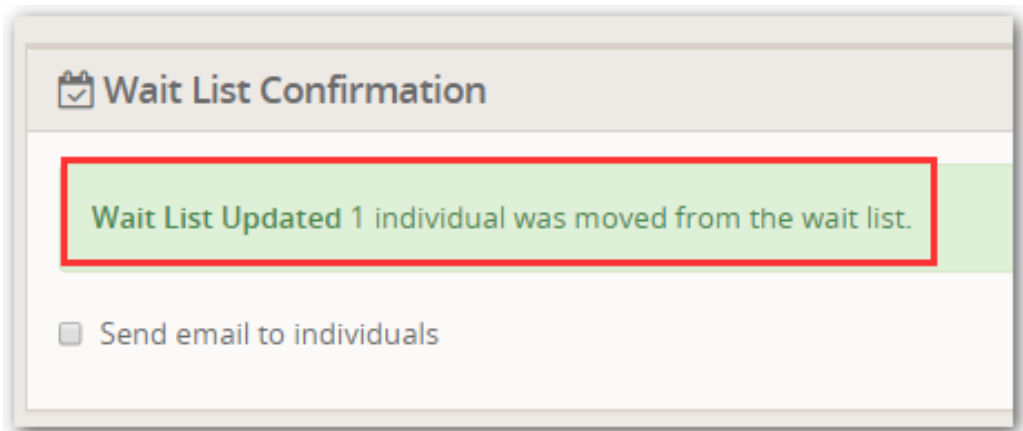
Wait List

Wait List Order	Wait List Individual
☒ 1	Charlet, Neil
☐ 2	Volunteer, Vicki

50 500 5,000 2 Wait List Individuals

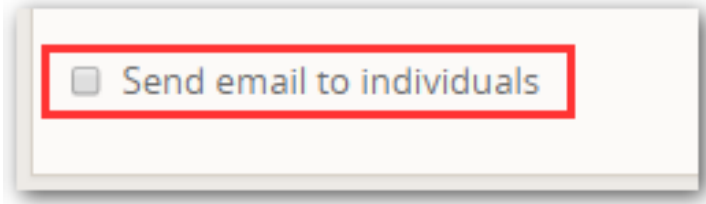
Move From Wait List

You'll see a confirmation screen indicating that the person has been moved off the wait list.



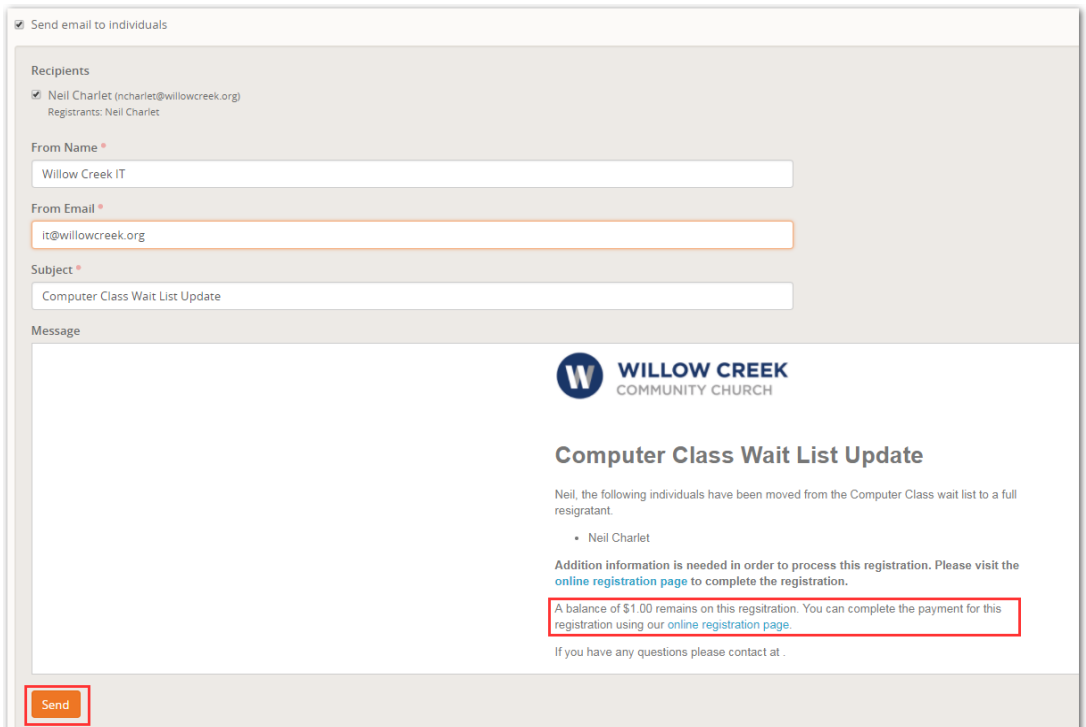
A confirmation screen titled "Wait List Confirmation" with a checkmark icon. A green message box states: "Wait List Updated 1 individual was moved from the wait list." Below this is a checkbox labeled "Send email to individuals".

Check the box to **Send email to individuals**.



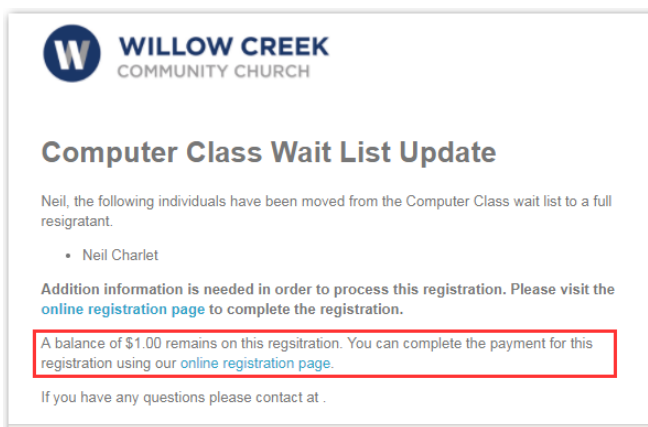
A close-up of the "Send email to individuals" checkbox, which is currently unchecked. The checkbox and label are enclosed in a red rectangular box.

Populate all of the required fields. The registrant will receive an email prompting them to complete their registration and/or make payment.



A screen for configuring and previewing an email. At the top, the "Send email to individuals" checkbox is checked. Below are fields for "Recipients" (Neil Charlet), "From Name" (Willow Creek IT), "From Email" (it@willowcreek.org), and "Subject" (Computer Class Wait List Update). A "Message" section shows a preview of the email content, including the Willow Creek Community Church logo, the title "Computer Class Wait List Update", and details about a \$1.00 balance. A red box highlights the payment information in the preview. A "Send" button is at the bottom left.

(example email that will be sent to the participant)

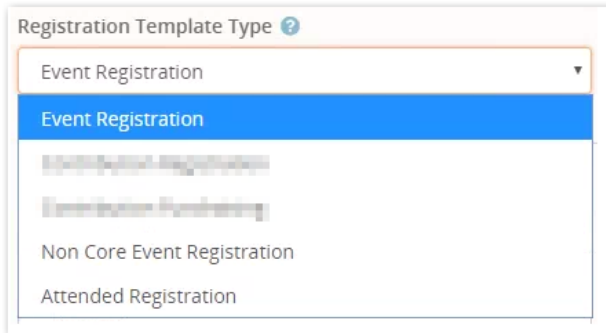


An example of the email sent to participants. It features the Willow Creek Community Church logo and the title "Computer Class Wait List Update". The body text informs the recipient that they have been moved from the wait list to a full registrant and provides instructions on how to complete the registration and payment. A red box highlights the payment information: "A balance of \$1.00 remains on this registration. You can complete the payment for this registration using our [online registration page](#)."

What's up with the different Template types??

You'll now see a few more Registration Template Types to choose from.

DO NOT select the "Contribution and Contribution Fundraising" template types. Those were created for special scenarios.



Registration Template Type ?

- Event Registration
- Non Core Event Registration
- Attended Registration

Event Registration

This is the default Template type that you'll choose for your event.



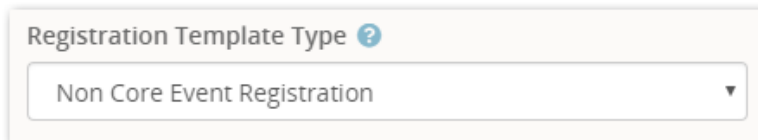
Registration Template Type ?

- Event Registration

Non Core

****You must check with IT before using this Template type**

A best practice for utilizing this template type would be for "social" events in which there is no need to retain the registration person's records.



Registration Template Type ?

- Non Core Event Registration

The registration process remains the same for the registrant and nothing visually will appear different for the registrant. On the back end within Rock....the person record that is created via the non core event will be "invisible" to anyone that is performing a rock name search. In layman's terms....we're hiding the non-core event person records. However, you WILL continue to see the registrants registration data from within the Instance on the registrants grid.

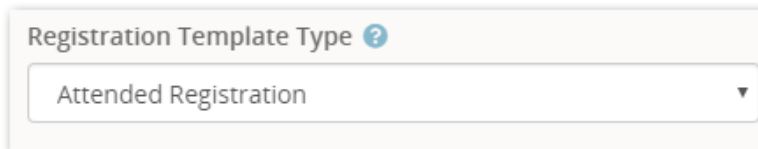
** Click here for additional details on how to setup a non-core template - <http://wcreek.cc/eventnoncore>

Attended Registration

****You must check with IT before using this Template type**

A best practice for utilizing this template type would be for events held on campus in which you want to guide/assist the registrant through the registration process.

This template type is GREAT because since you are searching for the person's record first, it helps us eliminate duplicate person records that are typically created during the self-registration process.

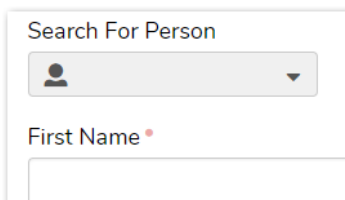


Registration Template Type ?

- Attended Registration

This template will place your registration into "Attended Mode". In other words, this is NOT meant for people to self-register but rather a volunteer/staff person will assist the user through the registration process.

When this Template type is selected, it places a Person Search box on the registration page. This allows the volunteer to FIRST search for the person's Rock record. If the person record is found and selected, it will then auto fill the users information from their Rock record. If the person's record is not found, then it will allow the volunteer to gather and populate the registration information.



Search For Person

First Name *