



## Invite Manager– Version 1.0

### Overview

The Invite Manger plugin provides a way for people to invite friends via email or text message through your Rock Instance. It lets you keep track of everyone who has invited people and lets you see how many people they have invited. It creates groups, similar to known relationships, that will keep track of the Inviters and Invitees so their information will not have to be entered each time. The invitation is sent via workflow by Email or Text Message, which can be customized based on your needs.

### Setup

After installing the plugin from the Rock Shop, you will want to go over to the *Admin Tools > General Settings > Campuses*. Select the campus you would like your members to invite people to and you will notice a new attribute called schedules. Here you will select the Schedule(s) that they will be invited to.

**Campuses**  
Home > General Settings > Campuses

**Campus List**

Name	Short Code	Phone Number	Campus Leader	Active
Main Campus	MAIN			✓
Online				✓

50 500 5,000 2 Campuses

**Campus Detail**  
Home > General Settings > Campuses > Campus Detail

**Main Campus** Active

<b>Status</b> Open	<b>Type</b> Physical
<b>Code</b> MAIN	<b>Location</b> Main Campus

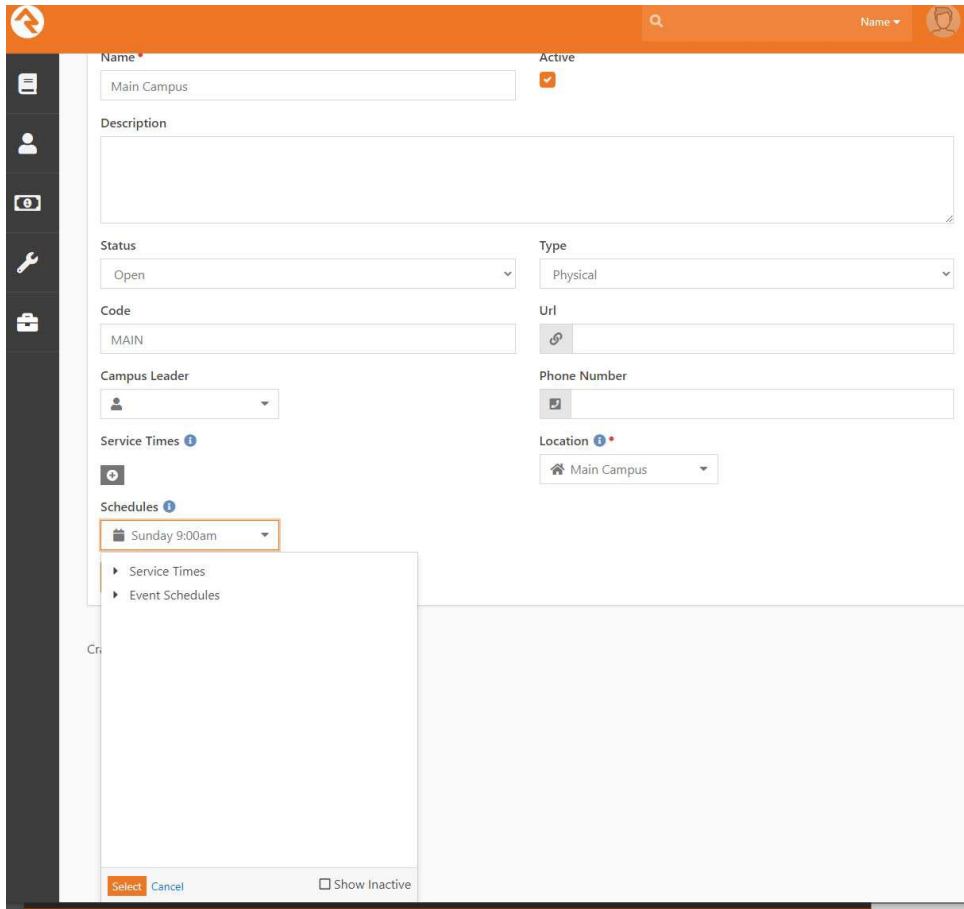
Edit Delete

**Campus Team**

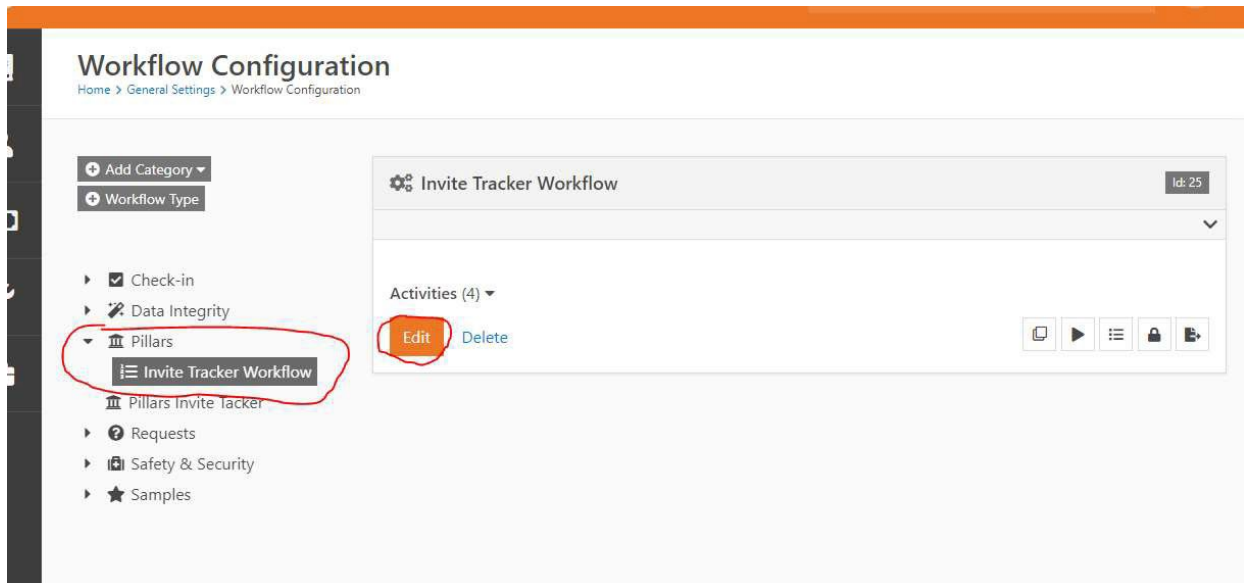
Filter Options

Name	Role	Member Status
No Group Members Found		

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Next you will want to go to *Admin Tools > General Settings > Workflow Configuration*. Then go to the *Category Pillars > Invite Tracker Workflow*.

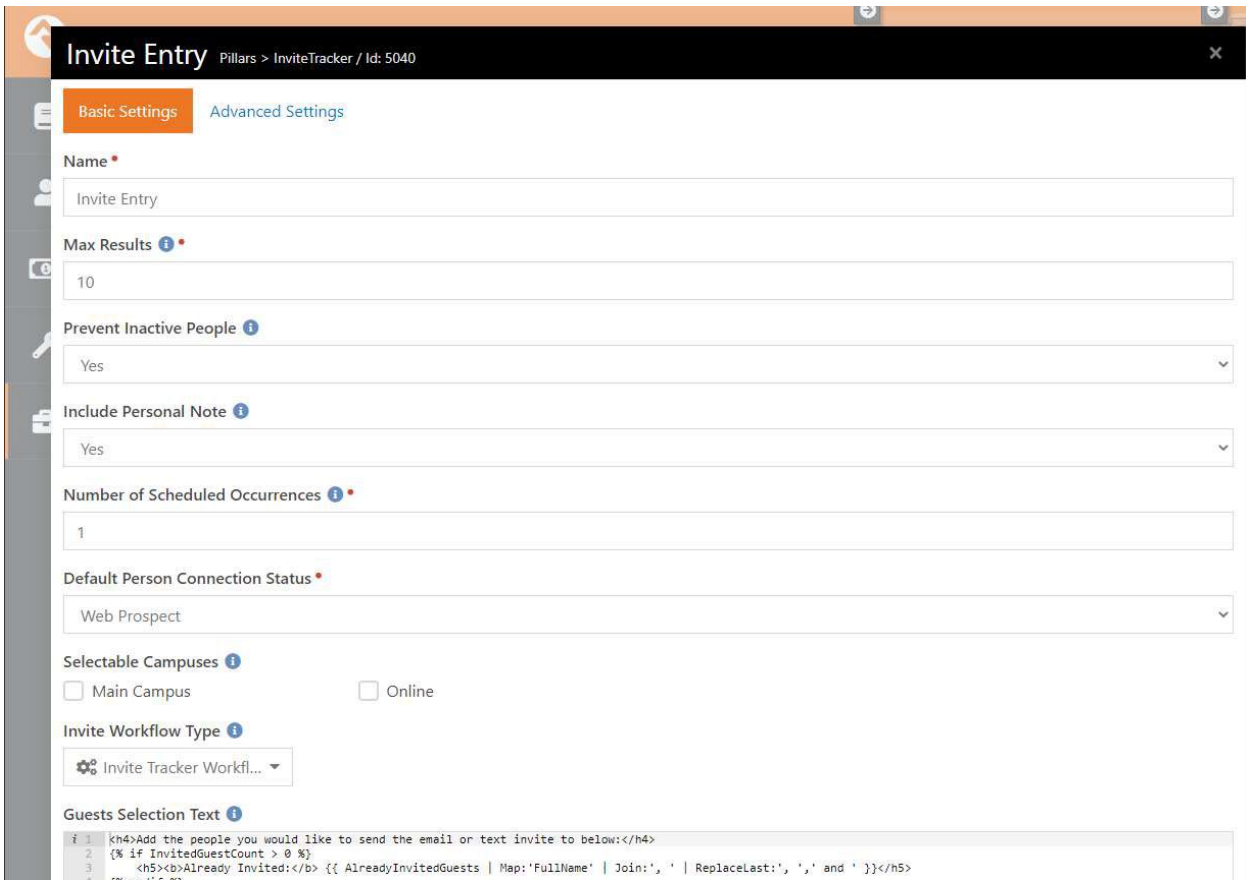
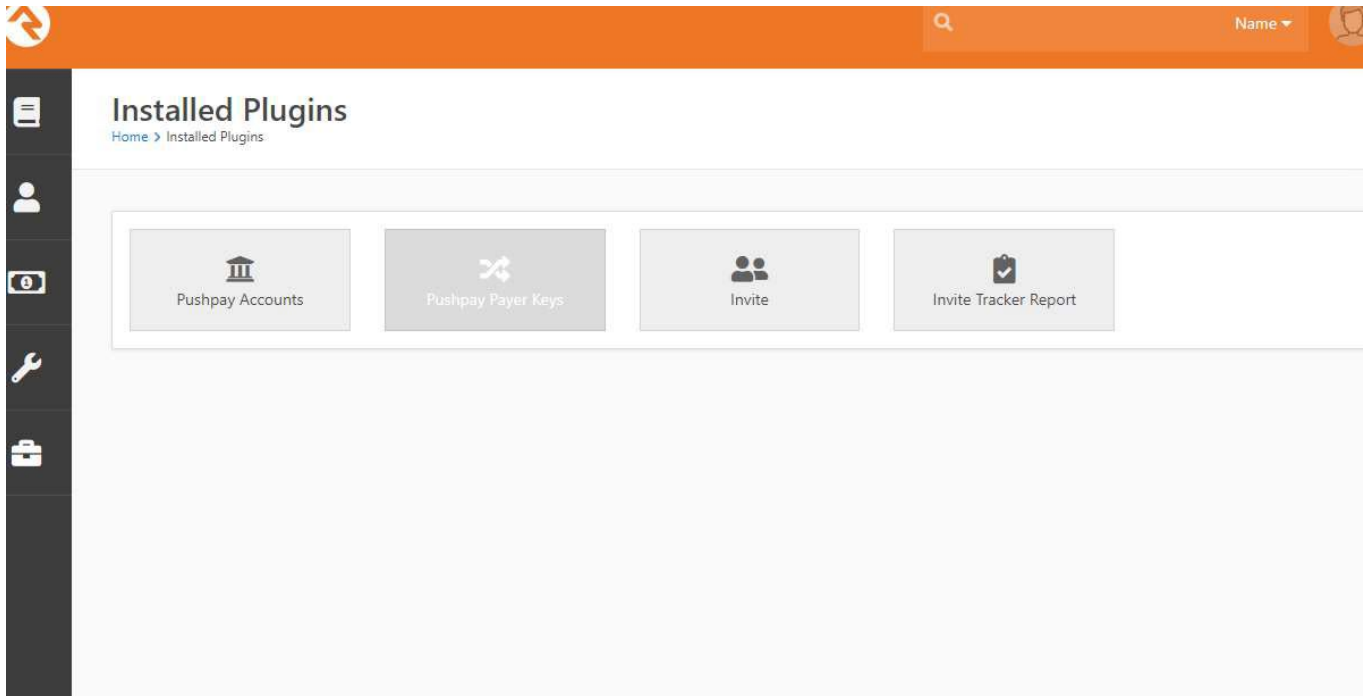


You will want to edit the workflow and select a number that will be used to

send a text invitation.

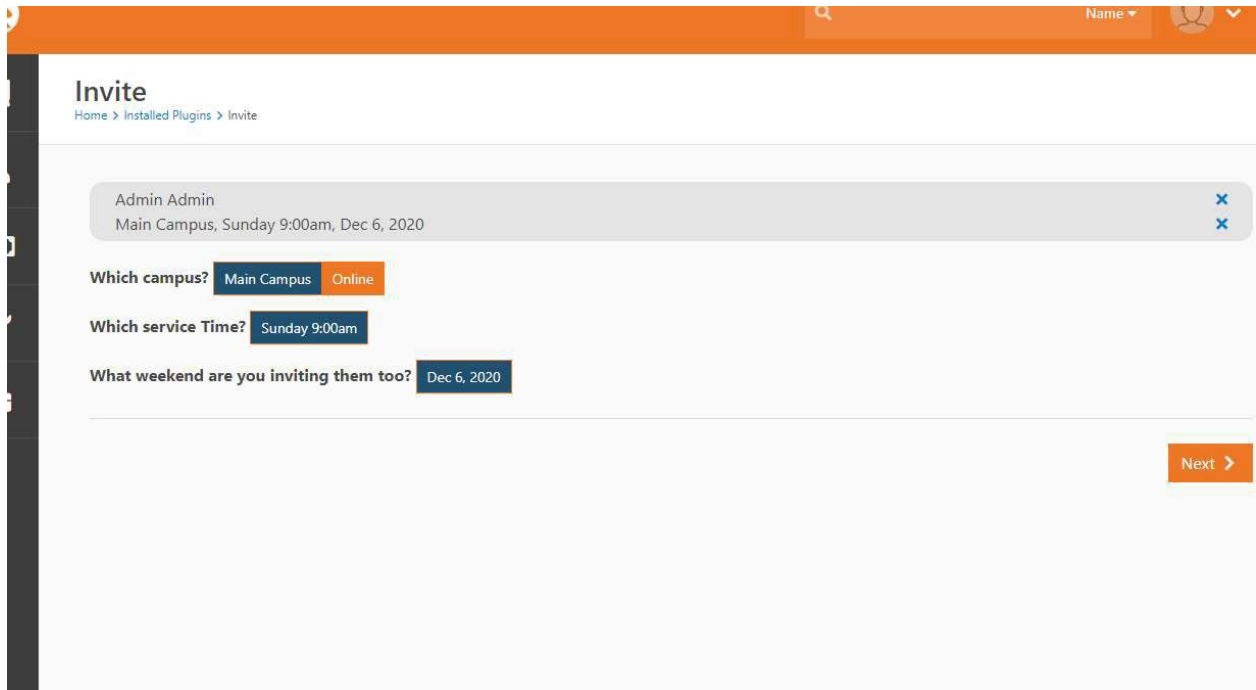
The screenshot displays a workflow editor interface. At the top, a 'Start' block is visible with a green header and 'Id: 72'. Below it is a 'Send Text' block with a dark grey header and 'Id: 73'. The 'Send Text' block configuration includes a 'Name' field containing 'Send Text', an 'Active' checkbox which is checked, and an 'Activated with Workflow' checkbox which is unchecked. There is also a 'Description' text area and an 'Attributes (2)' dropdown menu. Below the 'Send Text' block is an 'Actions' section with a '+ Add Action' button. The first action is 'Set URL'. Below that is a 'Send Invite Text' block with a light grey header. Its configuration includes a 'Name' field with 'Send Invite Text', an 'Action is Completed on Success' checkbox which is checked, and an 'Activity is Completed on Success' checkbox which is unchecked. The 'Action Type' is set to 'SMS Send', and there is a link to a 'Send Sms' Overview. The 'From' field is empty, and the 'Recipient' field is partially visible, showing 'Attribute Value' and 'OR'.

Finally, you will want to go over to the *Admin Tools > Installed Plugins* and select the Invite Page. You will want to edit the block settings and select the campuses you wish the user to invite people to and you will see other options there that you can configure for this block.



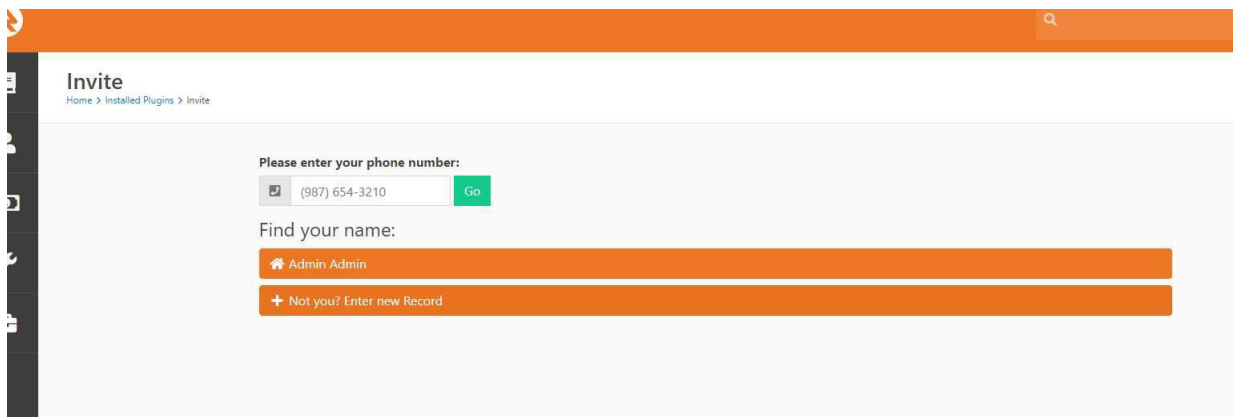
# Usage

Once you have updated your campuses and the workflow you can start using the functionality. (If you are logged in) You will notice it first display a campus selection, if you are only using what campus it will just show the schedule selection. Then finally the user will select a date.



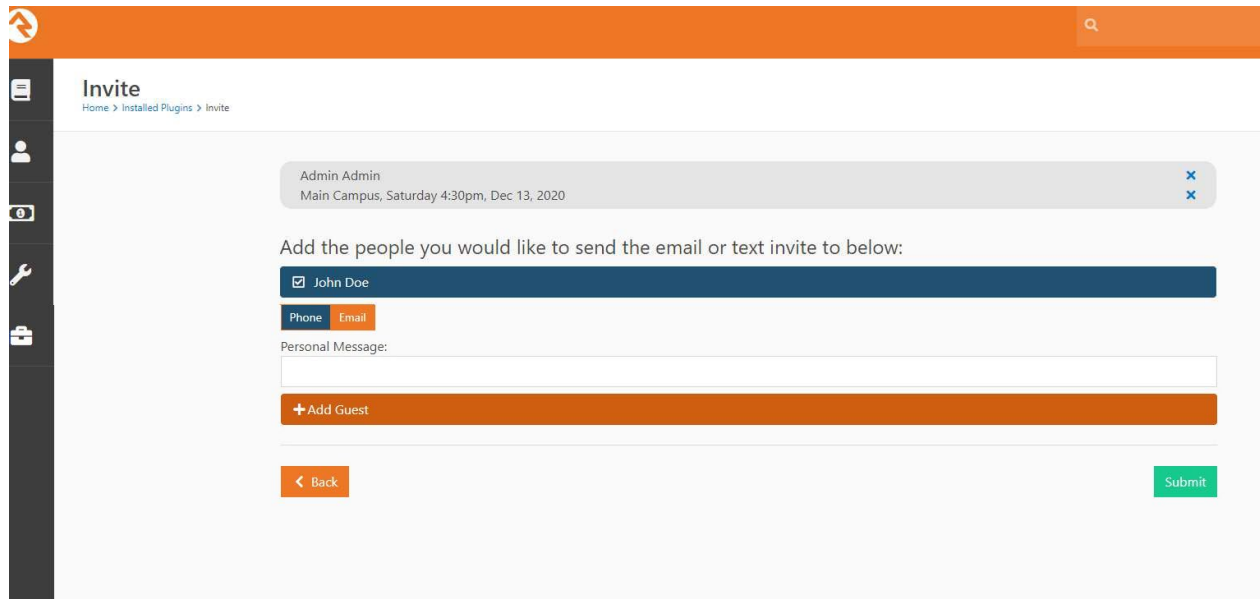
The screenshot shows the 'Invite' form in a web application. At the top, there is a search bar and a user profile icon. Below the header, the page title 'Invite' is displayed with a breadcrumb trail: 'Home > Installed Plugins > Invite'. A notification bar at the top of the form area shows 'Admin Admin' and 'Main Campus, Sunday 9:00am, Dec 6, 2020'. The form contains three selection questions: 'Which campus?' with options 'Main Campus' and 'Online'; 'Which service Time?' with the option 'Sunday 9:00am'; and 'What weekend are you inviting them too?' with the option 'Dec 6, 2020'. A 'Next >' button is located at the bottom right of the form.

(If you are not logged in you can find yourself by phone number, similar to check in, or create a person record for you)



The screenshot shows the 'Invite' form when a user is not logged in. The page title 'Invite' and breadcrumb trail 'Home > Installed Plugins > Invite' are visible. The form prompts the user to 'Please enter your phone number:' with a text input field containing '(987) 654-3210' and a 'Go' button. Below this, it asks 'Find your name:' and displays two search results in orange bars: 'Admin Admin' with a home icon and '+ Not you? Enter new Record' with a plus icon.

After clicking next you will see a button to add guests. Once these guests are added they will always show up as options, unless of course they have already been invited to the weekend that the user has selected.



Admin Admin  
Main Campus, Saturday 4:30pm, Dec 13, 2020

Invite  
Home > Installed Plugins > Invite

Add the people you would like to send the email or text invite to below:

John Doe

Phone Email

Personal Message:

+ Add Guest

< Back Submit

After selecting the users and entering an optional personal message you can hit submit and it will launch a workflow for each person.

## Reporting

You will notice a page in the *Admin Tools > Installed Plugins* called Invite Tracking Report. Here is where you will see a list of everyone who has invited someone and the number of invites, they have sent. If you click a specific role you will be routing to the Group of the person you selected. This is how these invites are handled you can see everyone they have entered to invite and if you select an individual you will see the dates they have invited them to.

**Invite Tracker Report**  
Home > Installed Plugins > Invite Tracker Report

**Filter**

Minimum Invites

[Filter](#) [Reset Filters](#)

Filter Options

<input type="checkbox"/>	First Name	Last Name	Invites
<input type="checkbox"/>	Admin	Admin	1

50 500 5,000 1 Item

**Group Viewer**  
Home > Admin Admin

[+ Add Group](#)

- Global Connector Group
- Section A
- Section B
- Serving Teams
- General Groups

**Admin Admin** Inverted Relationships ☆

[Edit](#) [Delete](#) 📍 🔒

**Group Members**

Filter Options

<input type="checkbox"/>	Name	Role	Member Status
<input type="checkbox"/>	Admin Admin	Invited By	Active <span>👤</span> <span>✕</span>
<input type="checkbox"/>	John Doe	Invited	Active <span>👤</span> <span>✕</span>

50 500 5,000 2 Group Members

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### Group Member Detail

Home > Admin Admin > John Doe

John Doe

Person \*  
John Doe

Role \*  
Invited

Note

Notified i

Member Status  
 Inactive  Active  Pending

Communication Preference  
 No Preference  Email  SMS

Dates Invited  
,12/13/2020 12:00:00 AM

Number of Times Invited  
1

Group Member Notes

## External Page

While the Invite page and its child page Invitation (which is used for the text message when an invitation is sent) are initially on the internal page you will want to move these pages to your public Rock site. When you do, make sure to confirm that the pages have the correct site/layout values after you move them.