

# GrowthZone - Managing Your Events



# Agenda

Send Event Invites and Other Communications

Manage Event Registrations

- Updates

- Cancelations

- Waiting List

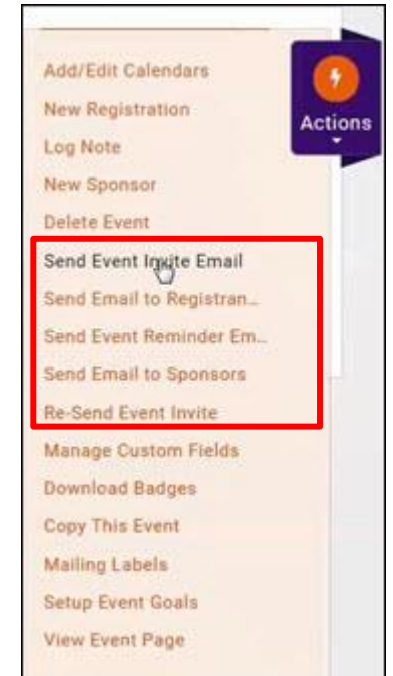
- Table/Team Assignment

Manage Event Invoicing

# Event Communications

The Events Module provides a variety of ways to manage your event attendees, starting with sending invitations all the way through your post-event reports. Templates have been designed to help you easily communicate new events to your members, resend emails, send reminders, etc.

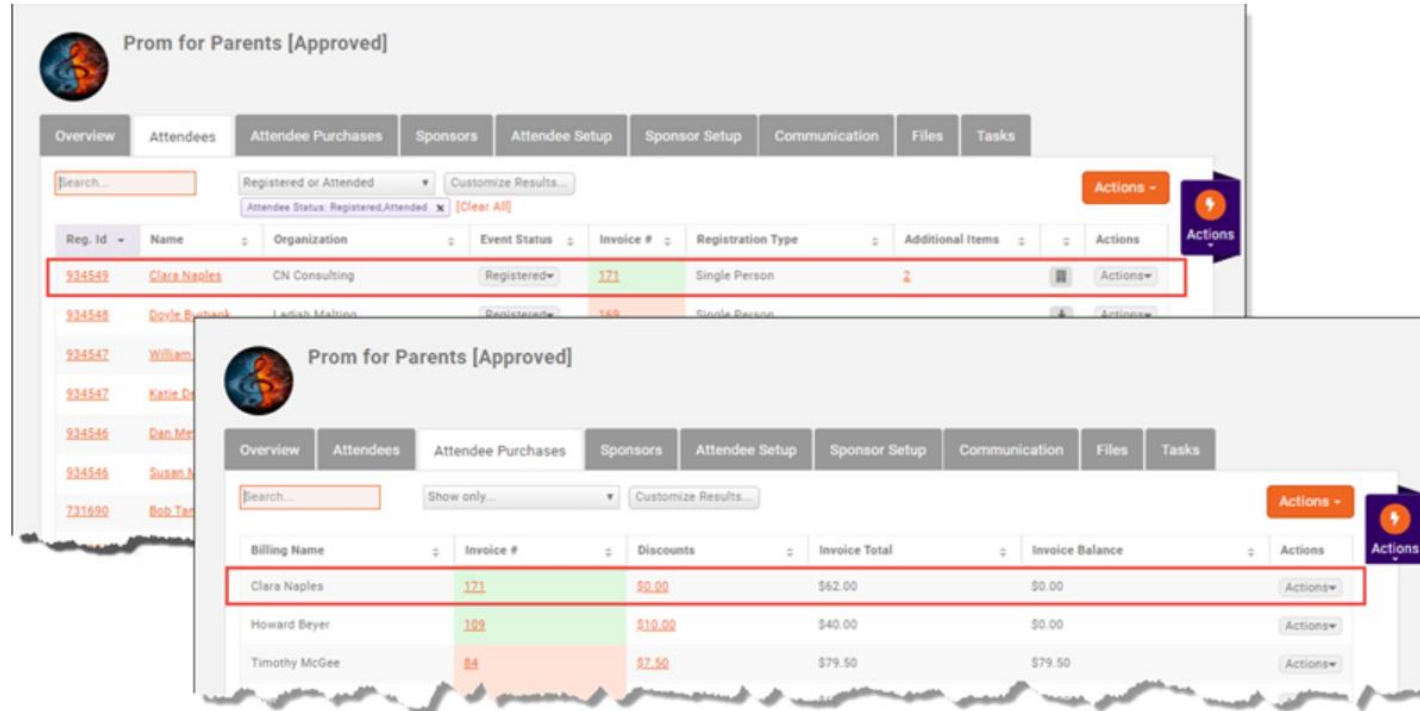
WIKI: [Event Communications](#)



# Managing Registrations/Attendees

Technically, an event registration consists of attendee information and financial information related to the registration.

[WIKI: Managing Registrations/Attendees](#)



The screenshot displays the 'Prom for Parents [Approved]' event management interface. It features a navigation menu with tabs for Overview, Attendees, Attendee Purchases, Sponsors, Attendee Setup, Sponsor Setup, Communication, Files, and Tasks. The main content area is divided into two sections: a list of attendees and a detailed financial view.

**Attendee List:**

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
934549	Clara Naples	CN Consulting	Registered	171	Single Person	2	Actions
934548	David Beyer	Ledish Mabino	Registered	169	Single Person		Actions
934547	William						
934547	Katie D						
934546	Dan M						
934546	Susan M						
731690	Bob T						

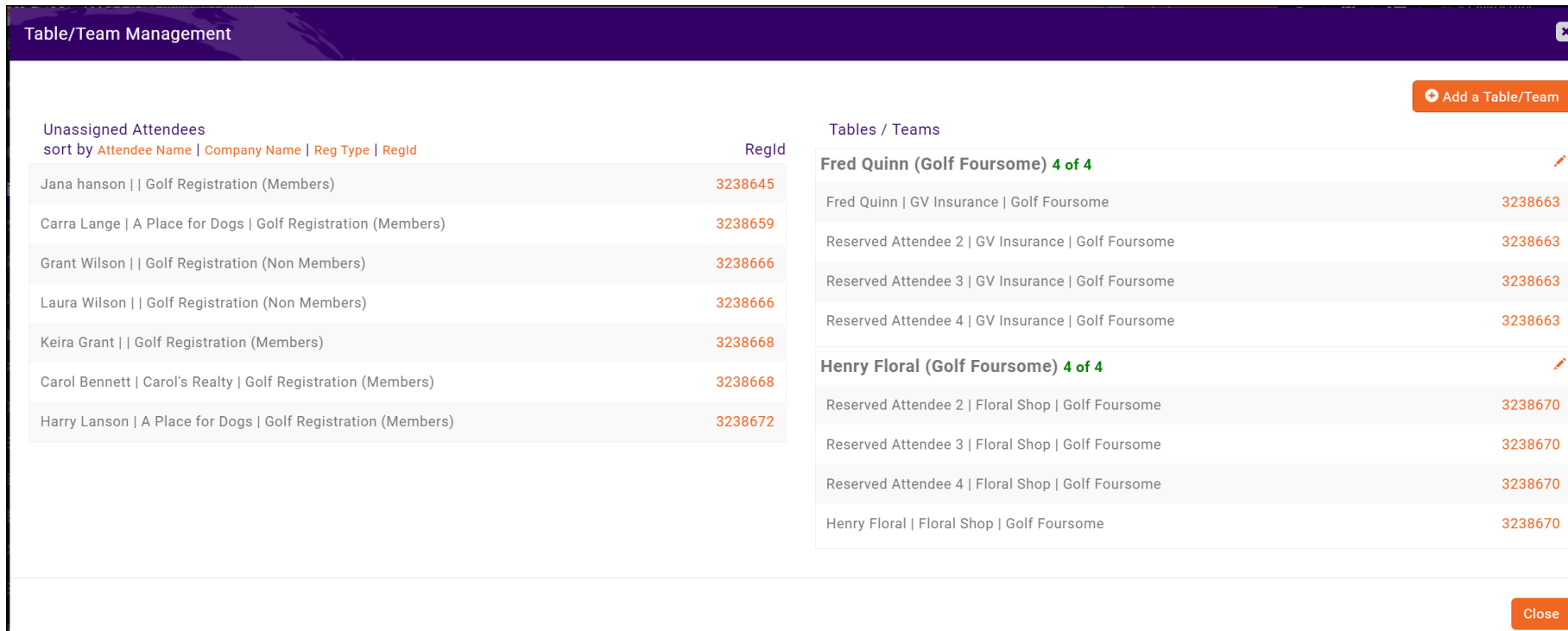
**Financial View:**

Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Clara Naples	171	\$0.00	\$62.00	\$0.00	Actions
Howard Beyer	169	\$10.00	\$40.00	\$0.00	Actions
Timothy McGee	84	\$7.50	\$79.50	\$79.50	Actions

# Table/Team Management

If your event has been set up with a table/team registration type, you can easily assign attendees to tables or teams

WIKI: [Table/Team Management](#)



The screenshot shows the 'Table/Team Management' interface. It features a dark purple header with the title and a close button. Below the header, there are two main sections: 'Unassigned Attendees' and 'Tables / Teams'. The 'Unassigned Attendees' section has a sort dropdown set to 'Attendee Name' and a 'RegId' column. The 'Tables / Teams' section has an 'Add a Table/Team' button and lists two teams: 'Fred Quinn (Golf Foursome) 4 of 4' and 'Henry Floral (Golf Foursome) 4 of 4'. Each team has a list of attendees with their respective 'RegId' values.

Unassigned Attendees	
Attendee Name   Company Name   Reg Type	RegId
Jana hanson     Golf Registration (Members)	3238645
Carra Lange   A Place for Dogs   Golf Registration (Members)	3238659
Grant Wilson     Golf Registration (Non Members)	3238666
Laura Wilson     Golf Registration (Non Members)	3238666
Keira Grant     Golf Registration (Members)	3238668
Carol Bennett   Carol's Realty   Golf Registration (Members)	3238668
Harry Lanson   A Place for Dogs   Golf Registration (Members)	3238672

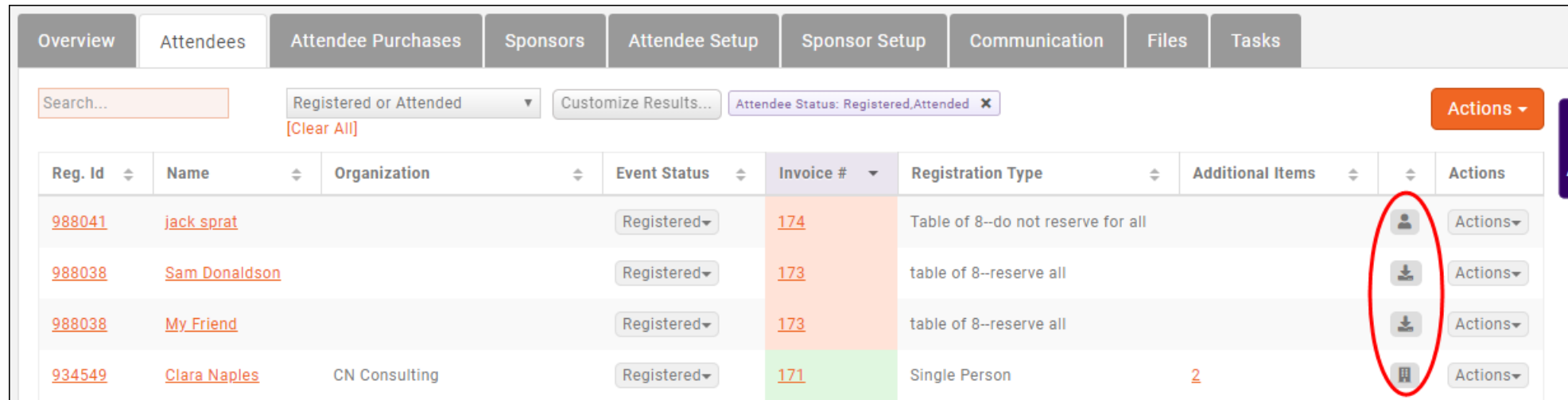
  

Tables / Teams	
<b>Fred Quinn (Golf Foursome) 4 of 4</b>	
Fred Quinn   GV Insurance   Golf Foursome	3238663
Reserved Attendee 2   GV Insurance   Golf Foursome	3238663
Reserved Attendee 3   GV Insurance   Golf Foursome	3238663
Reserved Attendee 4   GV Insurance   Golf Foursome	3238663
<b>Henry Floral (Golf Foursome) 4 of 4</b>	
Reserved Attendee 2   Floral Shop   Golf Foursome	3238670
Reserved Attendee 3   Floral Shop   Golf Foursome	3238670
Reserved Attendee 4   Floral Shop   Golf Foursome	3238670
Henry Floral   Floral Shop   Golf Foursome	3238670





# Matching Registrants to Contacts

Between the **Additional Items** and the **Actions** columns there is an unnamed column that *may* contain an icon for some registrants. If there **IS** an icon, it means something about the registration doesn't match the data in the system.

WIKI: [Matching Registrants to Contacts](#)



The screenshot shows the 'Attendees' tab in the GrowthZone software. The table displays registrant information with columns for Reg. Id, Name, Organization, Event Status, Invoice #, Registration Type, Additional Items, and Actions. A red circle highlights the unnamed column between 'Additional Items' and 'Actions', which contains icons for some registrants.

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items		Actions
<a href="#">988041</a>	<a href="#">jack sprat</a>		Registered	<a href="#">174</a>	Table of 8--do not reserve for all			Actions
<a href="#">988038</a>	<a href="#">Sam Donaldson</a>		Registered	<a href="#">173</a>	table of 8--reserve all			Actions
<a href="#">988038</a>	<a href="#">My_Friend</a>		Registered	<a href="#">173</a>	table of 8--reserve all			Actions
<a href="#">934549</a>	<a href="#">Clara Naples</a>	CN Consulting	Registered	<a href="#">171</a>	Single Person	2		Actions

# Cancelling a Registration

You can cancel a registration from the **Attendees** tab. NOTE: If an invoice has been created, or payment has been received, you will want to follow your business processes for writing off/refunding payment.

WIKI: [Cancelling a Registration](#)



The screenshot displays the 'Attendees' tab in the GrowthZone software. At the top, there are navigation tabs: Overview, Attendees (selected), Attendee Purchases, Sponsors, Attendee Setup, Sponsor Setup, Communication, Files, and Tasks. Below these are search and filter options, including a search bar, a dropdown for 'Registered or Attended', and a dropdown for 'Attendee Status' set to 'Registered, Attended'. An 'Actions' button is visible in the top right.

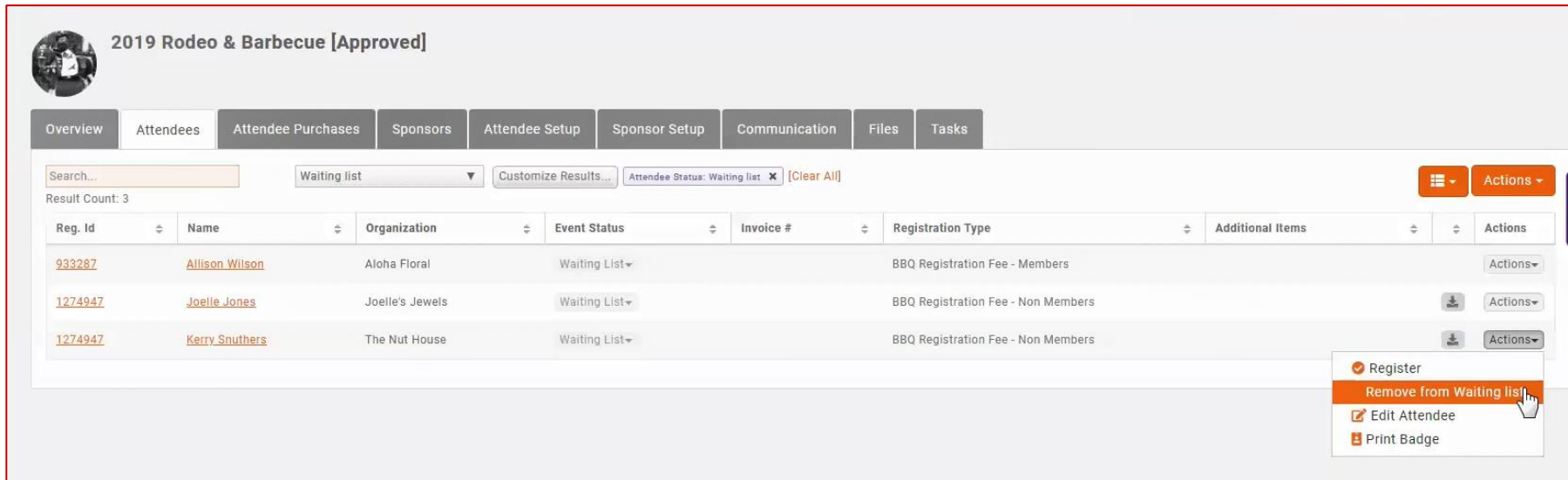
Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
114447	William Daniels	Bill's Garden Store	Registered	181	Couple		Actions
110651	Wes Wisco		Attended		Pay at the Door/Please invoice Me		Actions
128601	Jessica McLean		Attended	81	Session 3	1	Actions

An expanded 'Actions' menu is shown below the table, with a red arrow pointing to the 'Actions' button in the table. The menu is split into two sections: 'Unpaid Invoice' and 'Paid Invoice'. The 'Unpaid Invoice' section includes: Cancel Registration, Edit Attendee, Enter Check/Payment, Enter Credit Card, and Print Badge. The 'Paid Invoice' section includes: Cancel Registration, Edit Attendee, and Print Badge.

# Managing the Event Waiting List

If you have enabled **Allow Waiting List**, on the **Attendee** tab, you will be able to view who is on the waiting list, register people on the waiting list, and remove people from the waiting list.

WIKI: [Managing the Waiting List](#)



2019 Rodeo & Barbecue [Approved]

Overview Attendees Attendee Purchases Sponsors Attendee Setup Sponsor Setup Communication Files Tasks

Search... Waiting list Customize Results... Attendee Status: Waiting list [Clear All]

Result Count: 3

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
933287	Allison Wilson	Aloha Floral	Waiting List		BBQ Registration Fee - Members		Actions
1274947	Joelle Jones	Joelle's Jewels	Waiting List		BBQ Registration Fee - Non Members		Actions
1274947	Kerry Snuthers	The Nut House	Waiting List		BBQ Registration Fee - Non Members		Actions

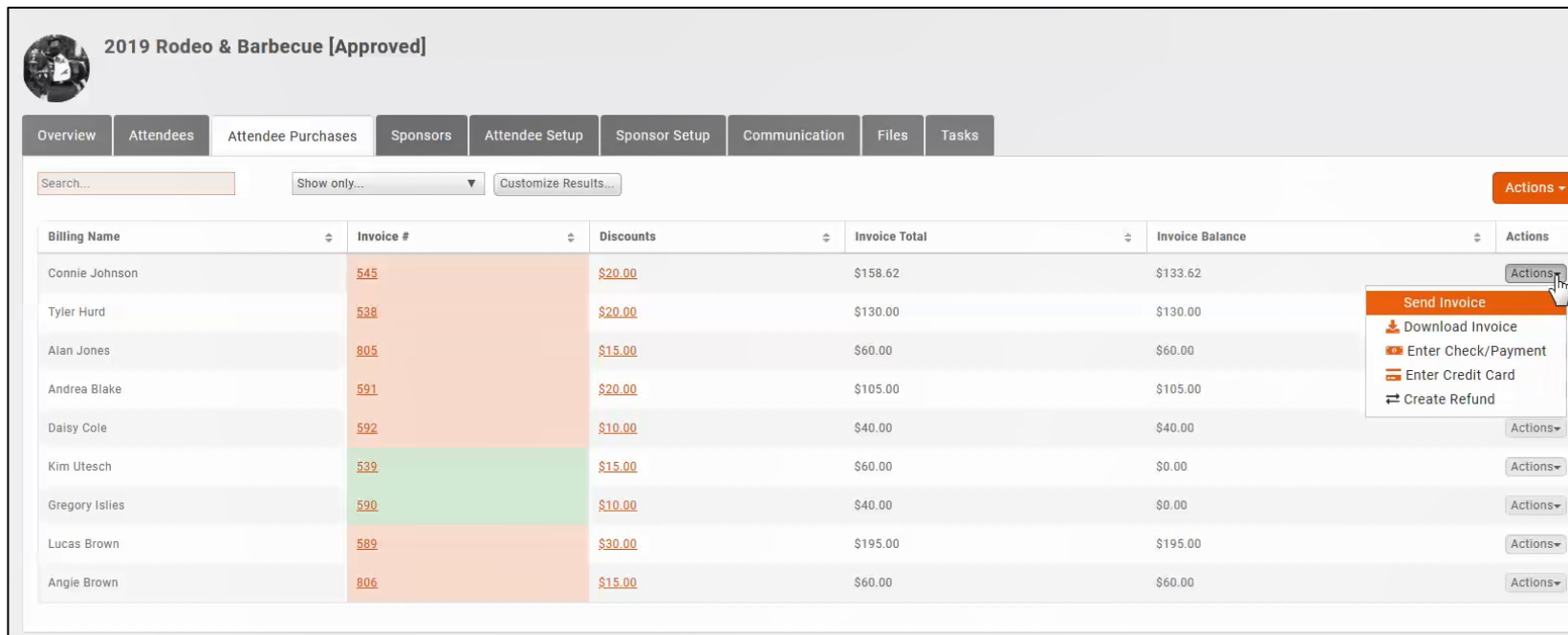
- Register
- Remove from Waiting list
- Edit Attendee
- Print Badge



# Event Payments & Invoices

The **Attendee Purchases** tab will contain important information about the event-related purchases made by the attendee. From here you can download/email invoices, and accept payments.

WIKI: [Event Payments & Invoices](#)



2019 Rodeo & Barbecue [Approved]

Overview Attendees Attendee Purchases Sponsors Attendee Setup Sponsor Setup Communication Files Tasks

Search... Show only... Customize Results... Actions

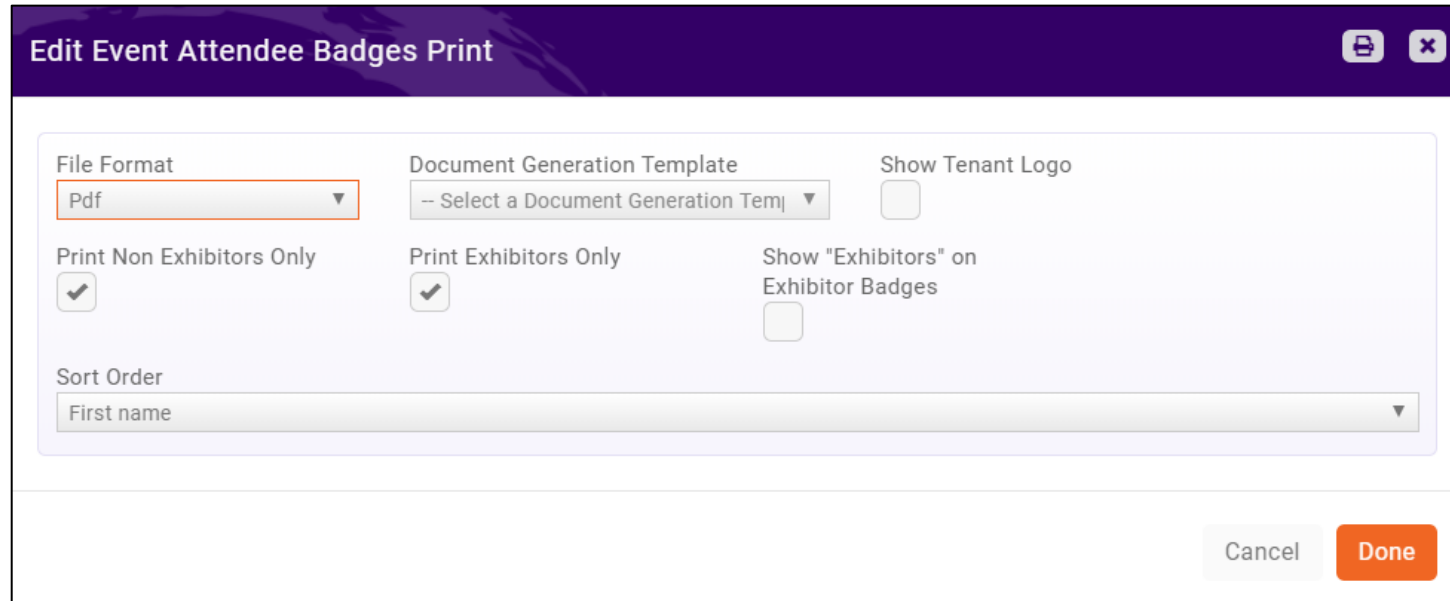
Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Connie Johnson	545	\$20.00	\$158.62	\$133.62	Actions
Tyler Hurd	538	\$20.00	\$130.00	\$130.00	Actions
Alan Jones	805	\$15.00	\$60.00	\$60.00	Actions
Andrea Blake	591	\$20.00	\$105.00	\$105.00	Actions
Daisy Cole	592	\$10.00	\$40.00	\$40.00	Actions
Kim Utesch	539	\$15.00	\$60.00	\$0.00	Actions
Gregory Islies	590	\$10.00	\$40.00	\$0.00	Actions
Lucas Brown	589	\$30.00	\$195.00	\$195.00	Actions
Angie Brown	806	\$15.00	\$60.00	\$60.00	Actions

Send Invoice  
Download Invoice  
Enter Check/Payment  
Enter Credit Card  
Create Refund

# Download Badges

You can easily download badges for your event, and a variety of Avery Style templates are available

WIKI: [Download Name Badges](#)



The screenshot shows a dialog box titled "Edit Event Attendee Badges Print" with a dark purple header. The dialog contains several configuration options for generating attendee badges:

- File Format:** A dropdown menu currently set to "Pdf".
- Document Generation Template:** A dropdown menu with the text "-- Select a Document Generation Template".
- Show Tenant Logo:** An unchecked checkbox.
- Print Non Exhibitors Only:** A checked checkbox.
- Print Exhibitors Only:** A checked checkbox.
- Show "Exhibitors" on Exhibitor Badges:** An unchecked checkbox.
- Sort Order:** A dropdown menu currently set to "First name".

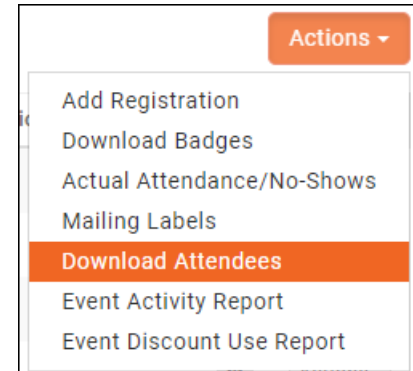
At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

# Managing Attendance

Select **Download Attendees** from the orange **Actions** button in the top right corner of the **Attendees** tab.

This spreadsheet will also provide you with details of custom fields, and additional purchases

WIKI: [Check-in Roster](#)



# Checking in Attendees

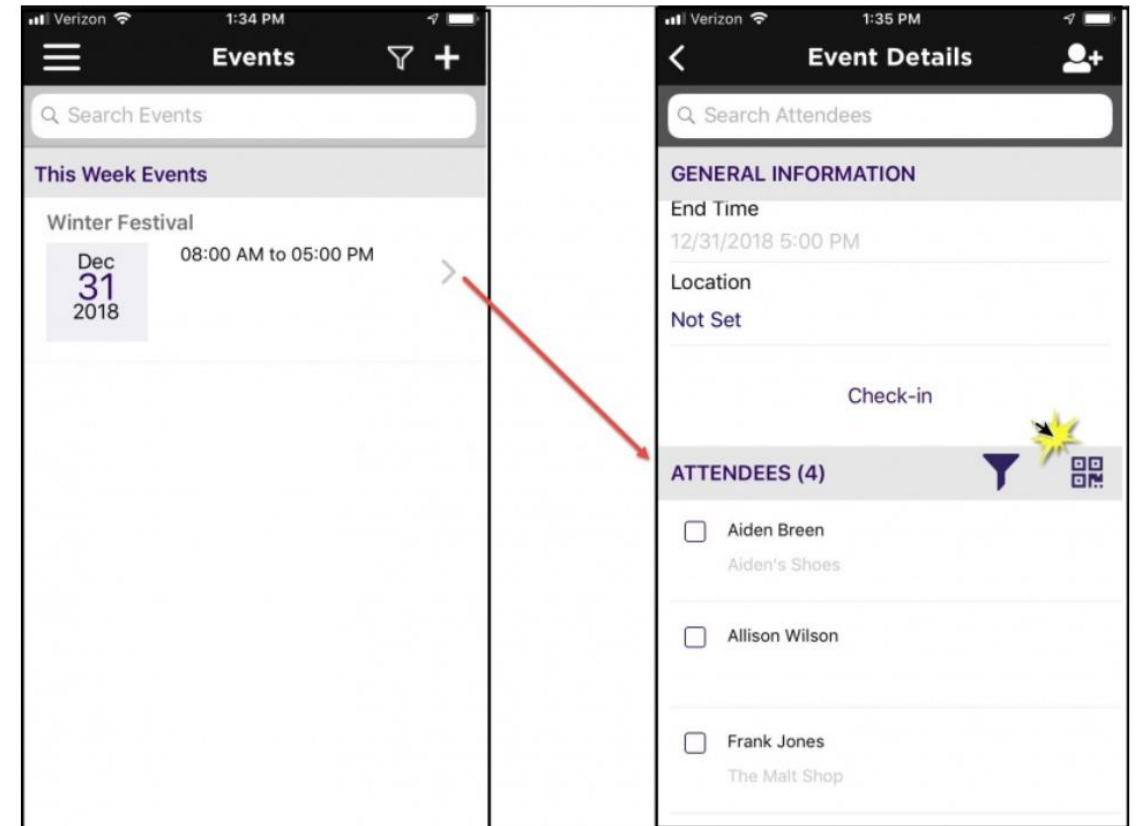
You may check-in your attendees in several ways:

- WIKI: [From the Guest List](#)
- WIKI: [From the Actions on the Attendees Tab](#)
- WIKI: [Using the Staff App](#)

# Checking in Attendees

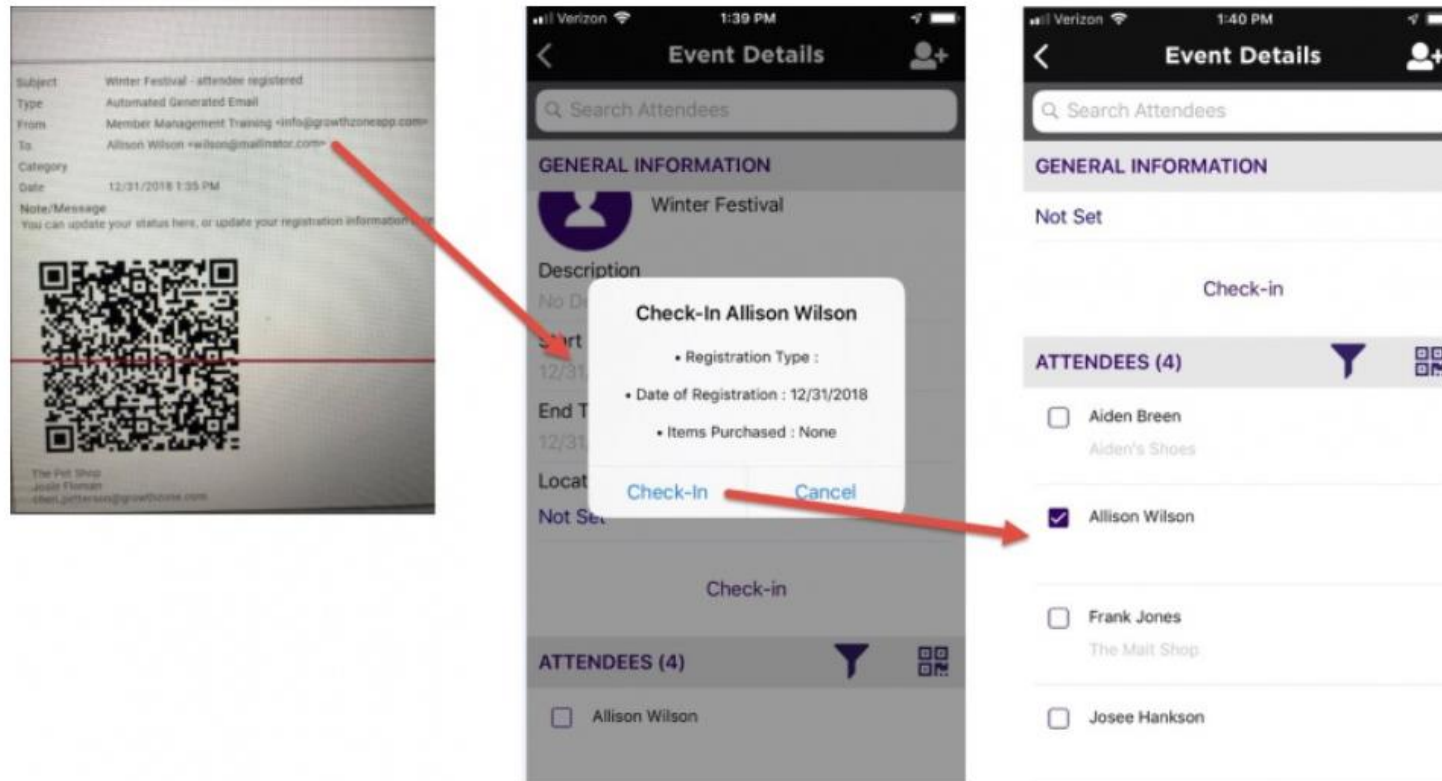
## Using the Staff App to Check-in Event Attendees

- WIKI: [Using the Staff App](#)



# Checking in Attendees

## Using the Staff App to Check-in Event Attendees



The system provides three event-related reports:

- **Event Attendees Report** (Available in **Reports** module only)
- **Event Activity Report** (**Reports** module as well from the orange **Actions** button in both the **Attendees** and **Attendee Purchases** tab)
- **Event Discount Use Report** (**Reports** module as well from the orange **Actions** button in both the **Attendees** and **Attendee Purchases** tab)

WIKI: [Event Reporting](#)

Questions??