

GrowthZone - Managing Your Events



Agenda

Send Event Invites and Other Communications

Manage Event Registrations

- Updates

- Cancelations

- Waiting List

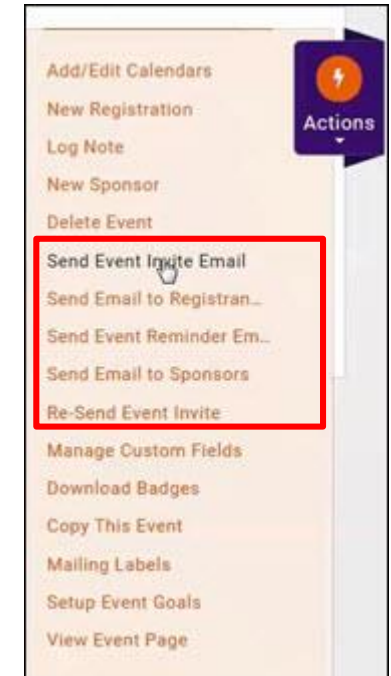
- Table/Team Assignment

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.

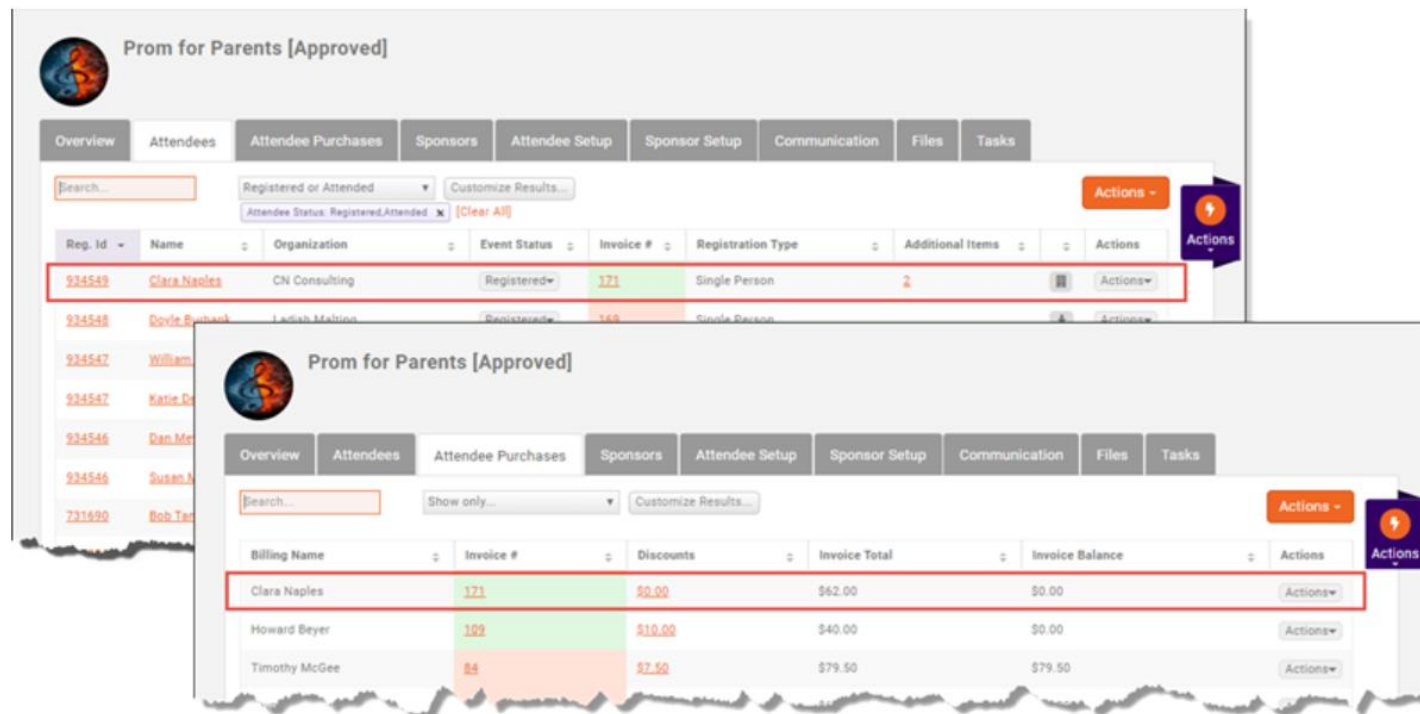
WIKI: [Event Communications](#)



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 page in the GrowthZone software. The interface includes a navigation menu with tabs for Overview, Attendees, Attendee Purchases, Sponsors, Attendee Setup, Sponsor Setup, Communication, Files, and Tasks. A search bar and filters for 'Registered or Attended' and 'Attendee Status: Registered, Attended' are visible. The main content area shows a list of attendees with columns for Reg. Id, Name, Organization, Event Status, Invoice #, Registration Type, and Additional Items. A red box highlights the first row: Clara Naples, CN Consulting, Registered, Invoice # 171, Single Person, 2. Below this, a detailed view of the financial information for Clara Naples is shown, including Billing Name, Invoice #, Discounts, Invoice Total, and Invoice Balance.

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 Berman	Ladish Mabine	Registered	168	Single Person		Actions
934547	William						
934547	Katie D						
934546	Dan M						
934546	Susan M						
731690	Bob T						

Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Clara Naples	171	\$0.00	\$62.00	\$0.00	Actions
Howard Beyer	109	\$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](#)

Table/Team Management

[Add a Table/Team](#)

Unassigned Attendees	
Attendee Name Company Name Reg Type RegId	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

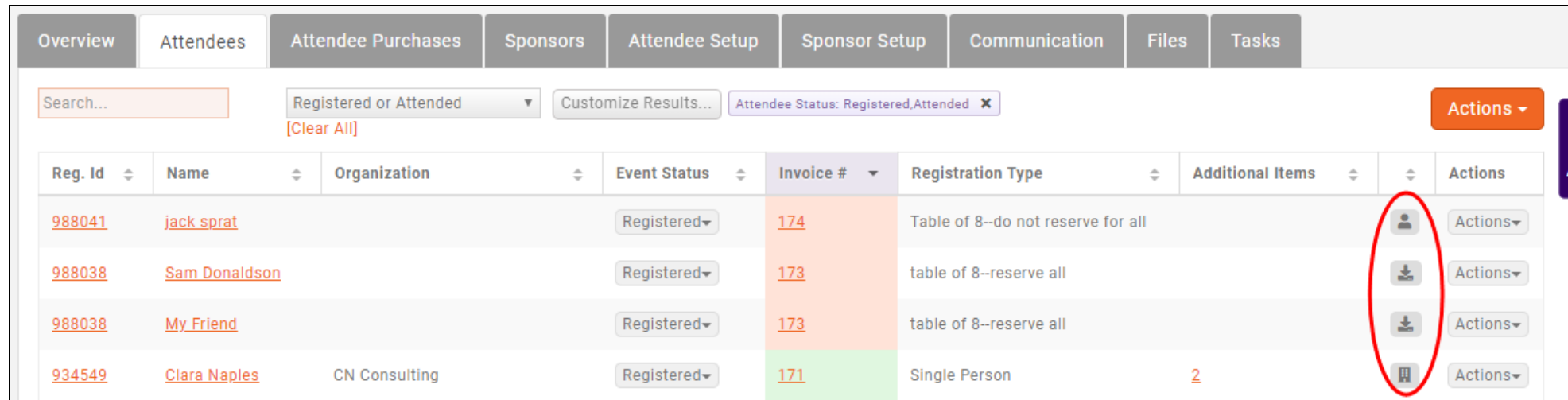
Tables / Teams	
Fred Quinn (Golf Foursome) 4 of 4	
Fred Quinn GV Insurance Golf Foursome	3238663
Reserved Attendee 2 GV Insurance Golf Foursome	3238663
Reserved Attendee 3 GV Insurance Golf Foursome	3238663
Reserved Attendee 4 GV Insurance Golf Foursome	3238663
Henry Floral (Golf Foursome) 4 of 4	
Reserved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





[Close](#)

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](#)



Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items		Actions
988041	jack sprat		Registered	174	Table of 8--do not reserve for all			Actions
988038	Sam Donaldson		Registered	173	table of 8--reserve all			Actions
988038	My Friend		Registered	173	table of 8--reserve all			Actions
934549	Clara Naples	CN Consulting	Registered	171	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.

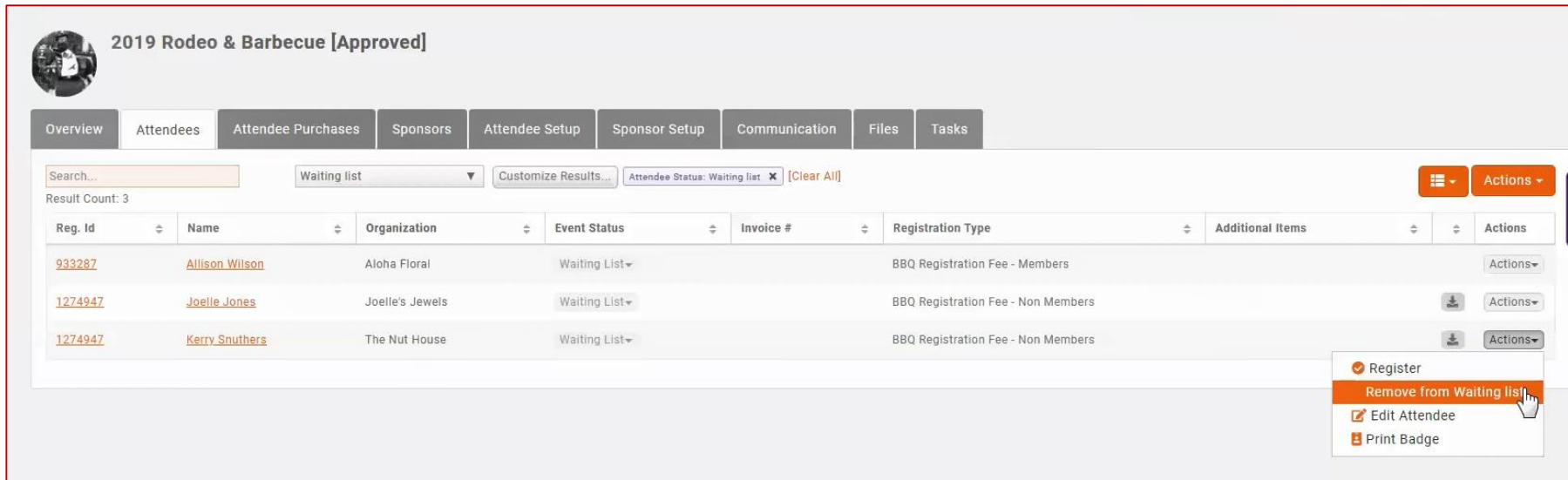
Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
114447	William Daniels	Bill's Garden Tours	Registered	181	Couple		Actions
110651	Wes Wisco		Attended		Pay at the Door/Please invoice Me		Actions
128601	Jessika McLean		Attended	81	Session 3	1	Actions

An expanded 'Actions' menu is shown for the 'Wes Wisco' row, which has an 'Unpaid Invoice'. The menu includes: Cancel Registration, Edit Attendee, Enter Check/Payment, Enter Credit Card, and Print Badge. Another expanded 'Actions' menu is shown for the 'Jessika McLean' row, which has a 'Paid Invoice'. This menu includes: Cancel Registration, Edit Attendee, and Print Badge. A red arrow points from the 'Actions' button in the table to the 'Paid Invoice' menu.

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

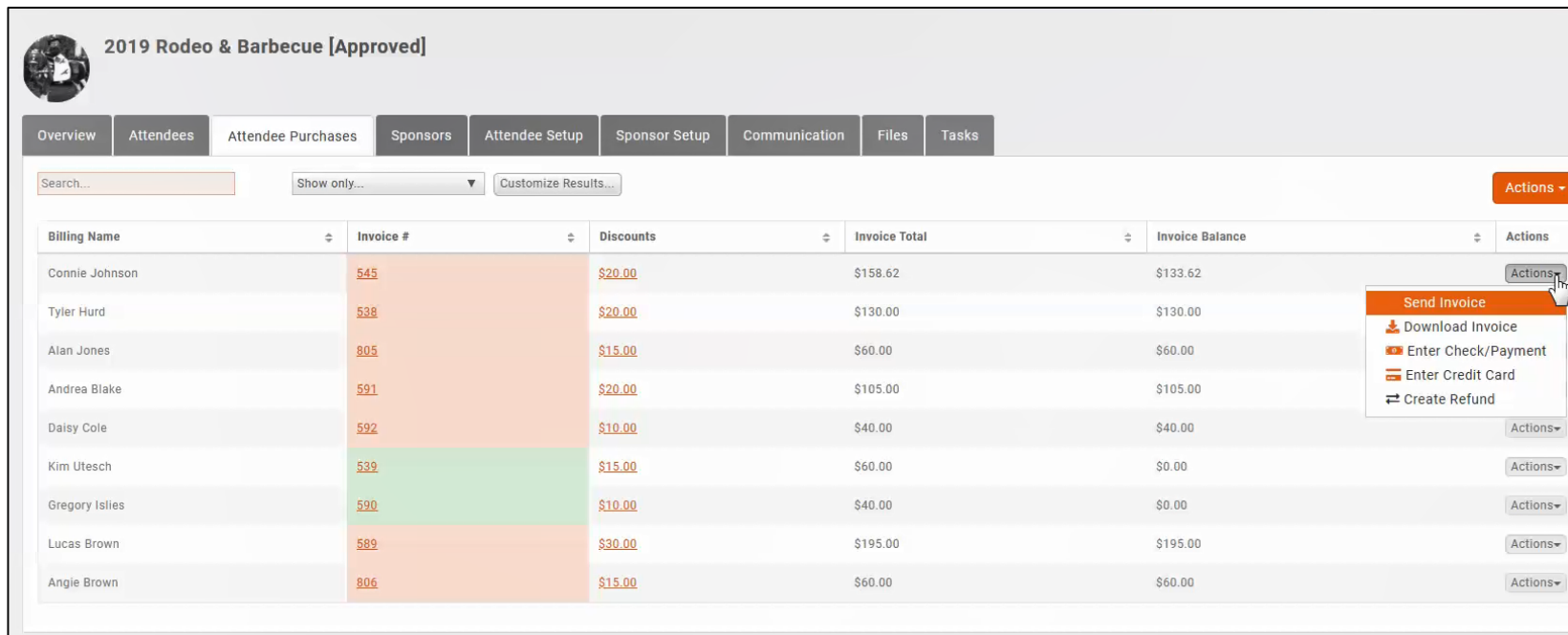
Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
933287	Allison Wilson	Aloha Floral	Waiting List		BBQ Registration Fee - Members		Actions
1274947	Joelle Jones	Joelle's Jewels	Waiting List		BBQ Registration Fee - Non Members		Actions
1274947	Kerry Snuthers	The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

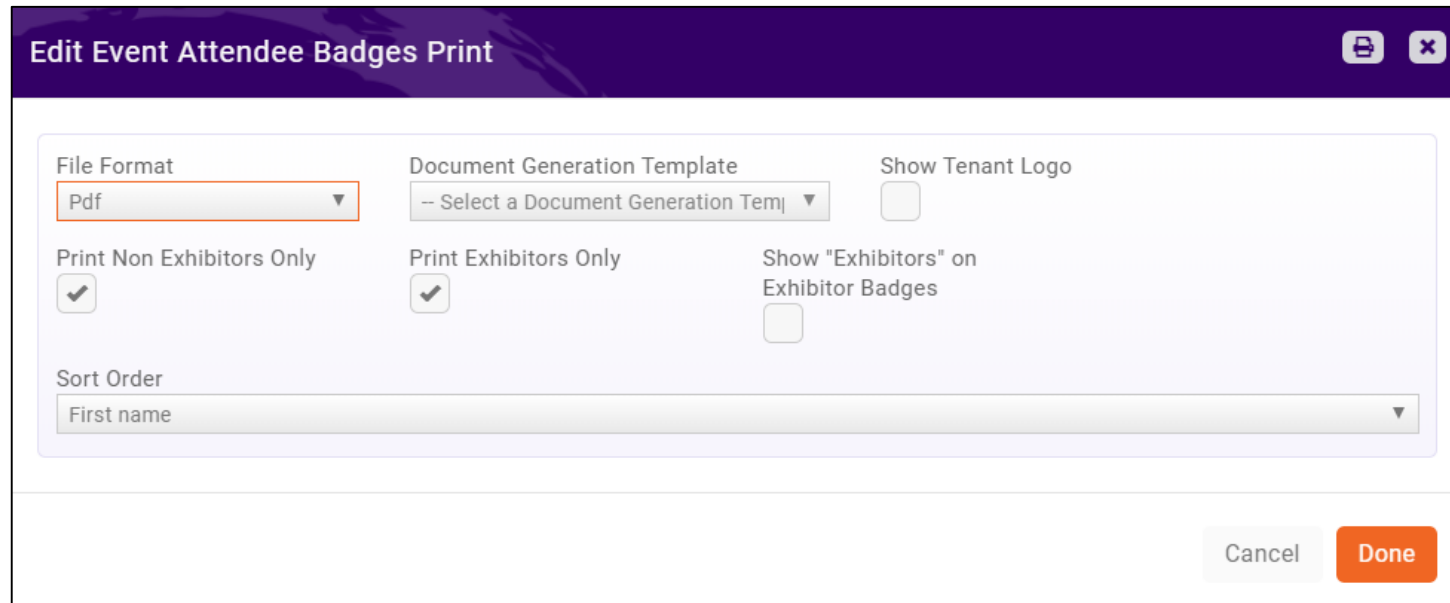
Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Connie Johnson	545	\$20.00	\$158.62	\$133.62	Actions
Tyler Hurd	538	\$20.00	\$130.00	\$130.00	Actions
Alan Jones	805	\$15.00	\$60.00	\$60.00	Actions
Andrea Blake	591	\$20.00	\$105.00	\$105.00	Actions
Daisy Cole	592	\$10.00	\$40.00	\$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 Tem|".
- 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".

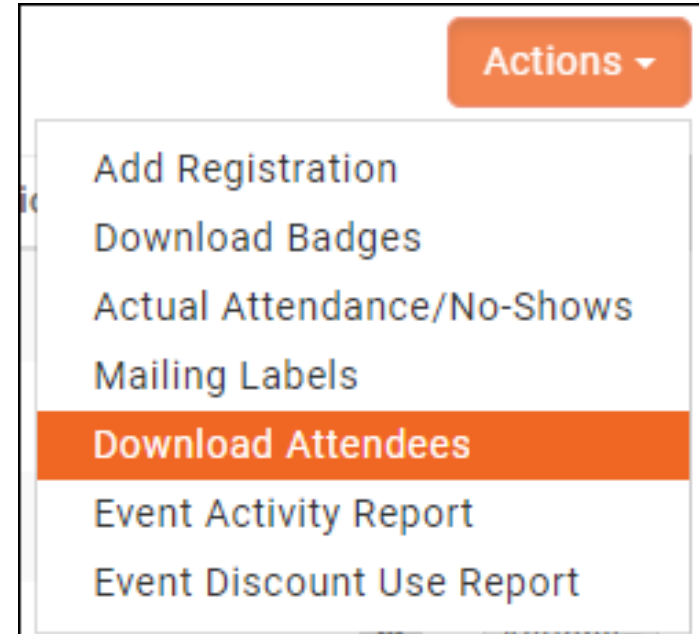
At the bottom right of the dialog, there are two buttons: "Cancel" (light gray) and "Done" (orange).

Managing Attendance

Select Download Attendees from the orange Actions button in the top right corner of the Attendees tab, to download a spreadsheet that can act as a check-in roster

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

WIKI: [Check-in Roster](#)



Checking in Attendees

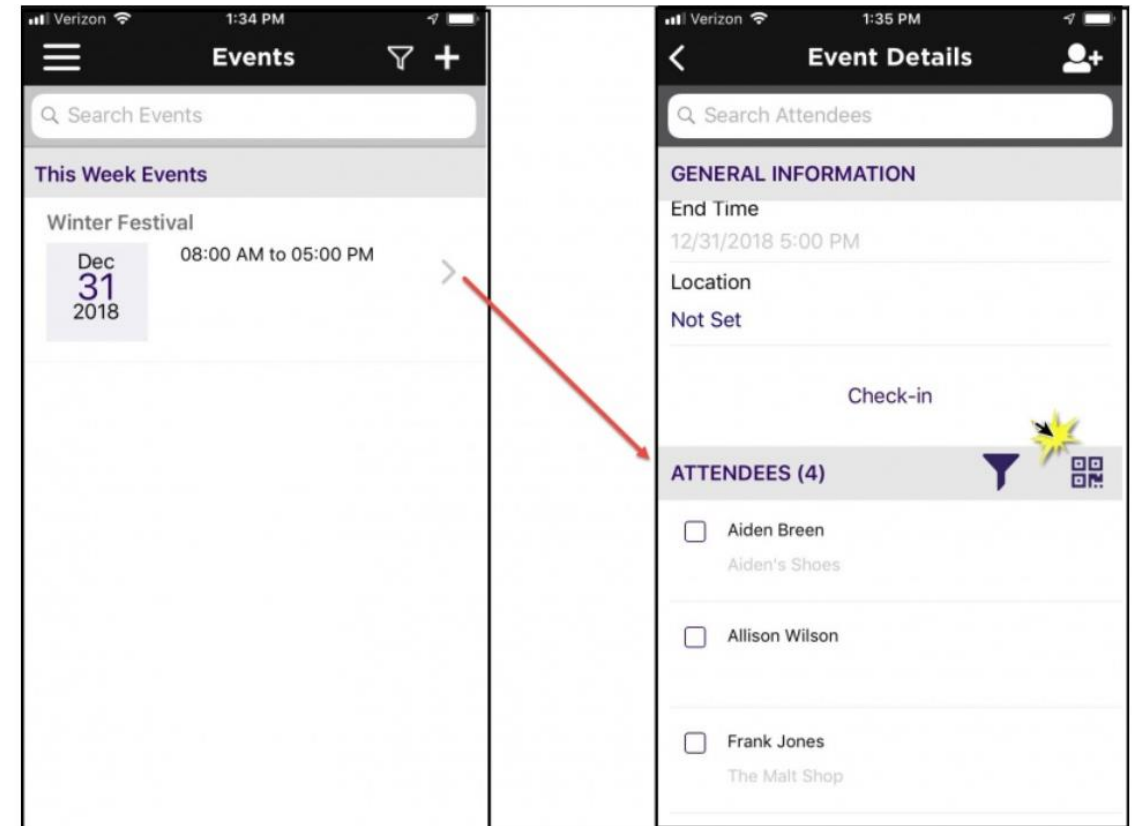
You may check-in your attendees in several ways:

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

Checking in Attendees

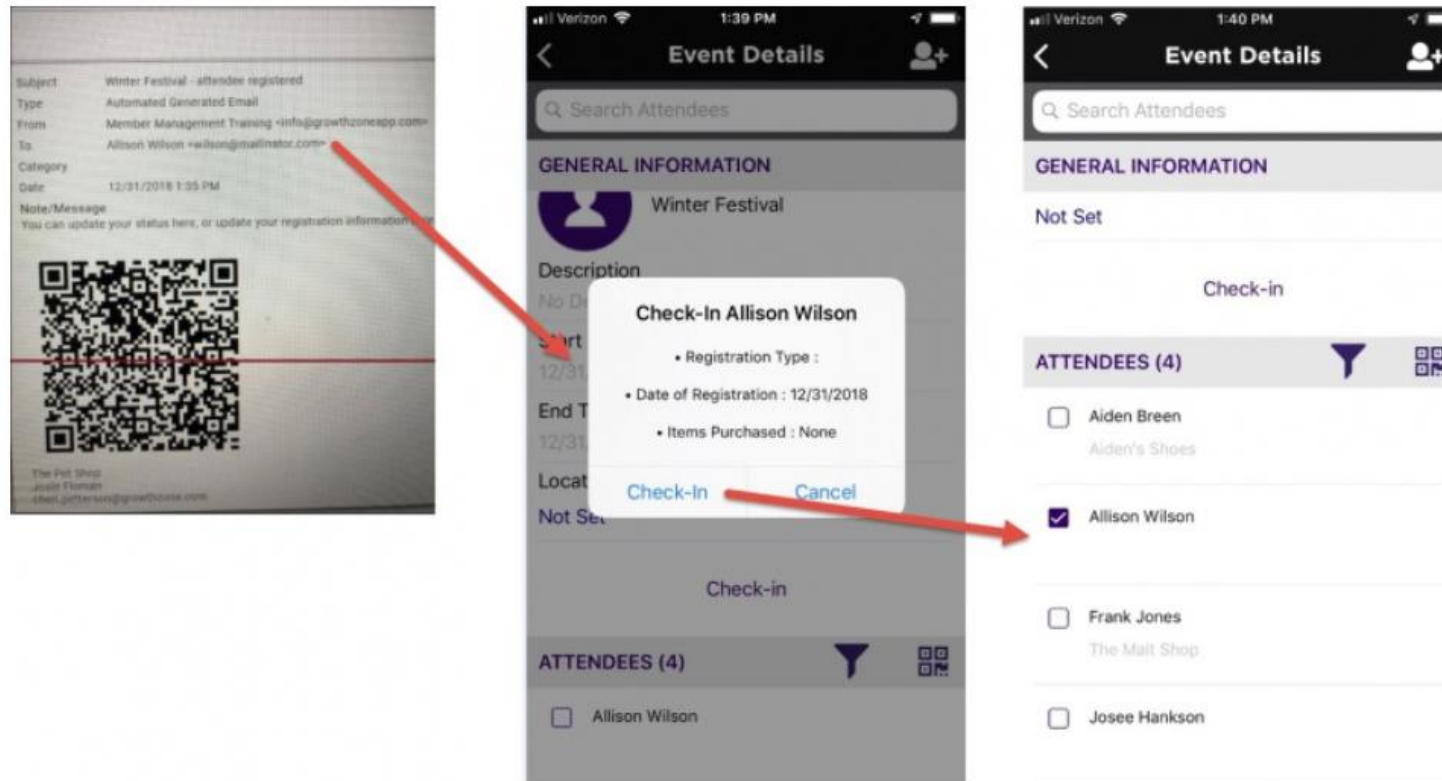
Using the Staff App to Check-in Event Attendees

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



Checking in Attendees

Using the Staff App to Check-in Event Attendees



Postpone an Event

It is unfortunate, but at times, you may find it necessary to postpone an event.

The **Postpone Event** automated features allow you to easily:

- Update the event title
- Update the event description
- Communicate to event registrants
- Disable on-line registration
- Turn off the reminder email (if applicable)

WIKI: [Postpone an Event](#)



The screenshot shows the event management interface for a postponed event. At the top, there is a header with a globe icon and the text "** Postponed ** Annual Trade Show 2021 [Postponed]". Below the header is a navigation bar with tabs for Overview, Attendees, Attendee Purchases, Sponsors, and Exhibitors (Beta). The main content area is divided into sections: General Information, Description, and Sponsorships. The General Information section includes fields for Name, Status, Publish Date, Category, Calendar, Created By, and Created Date. The Description section contains a paragraph of text. The Sponsorships section has a table with columns for Name, Available, and Sold.

General Information	
Name	** Postponed ** Annual Trade Show 2021
Status	Postponed
Publish Date	7/15/2020
Category	Trade Show
Calendar	MN Veterinary Chapter Events Calendar, North Dakota Veterinary Chapter Events Calendar, SD Vet Assoc Calendar, Community Calendar
Created By	Shelly Satre
Created Date	7/15/2020 10:12 AM

Description

** Postponed ** Join us for our 20th Annual Trade Show & Expo. This event will feature more than 100 exhibitors, along with a substantial lineup of speaker presentations and panel discussions from experts in the research, production and globalization.

Sponsorships		
Name	Available	Sold
None to display		

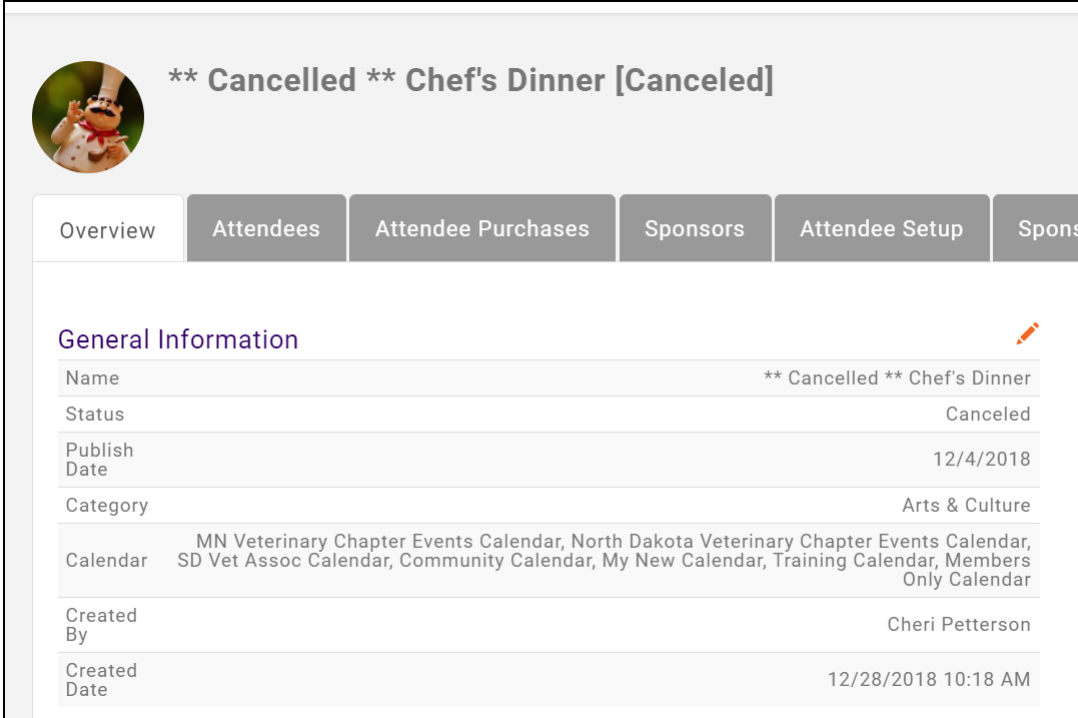
Cancel an Event

It is unfortunate, but at times, you may find it necessary to cancel an event.

The **Cancel this Event** automated process allows you to:

- Cancel registrations for all registrants
- Credit registrants
- Mass write-off any unpaid invoices
- Send an email to registrants
- Disable online registration
- Disable 48 hour reminder (if applicable)

WIKI: [Cancel an Event](#)



The screenshot displays the GrowthZone interface for a cancelled event. At the top, there is a profile picture of a chef and the text "** Cancelled ** Chef's Dinner [Canceled]". Below this is a navigation bar with tabs for Overview, Attendees, Attendee Purchases, Sponsors, Attendee Setup, and Sponsors. The main content area is titled "General Information" and contains the following details:

Name	** Cancelled ** Chef's Dinner
Status	Canceled
Publish Date	12/4/2018
Category	Arts & Culture
Calendar	MN Veterinary Chapter Events Calendar, North Dakota Veterinary Chapter Events Calendar, SD Vet Assoc Calendar, Community Calendar, My New Calendar, Training Calendar, Members Only Calendar
Created By	Cheri Petterson
Created Date	12/28/2018 10:18 AM

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?

