GrowthZone – Managing Your Events

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Agenda

Send Event Invites and Other Communications

Manage Event Registrations

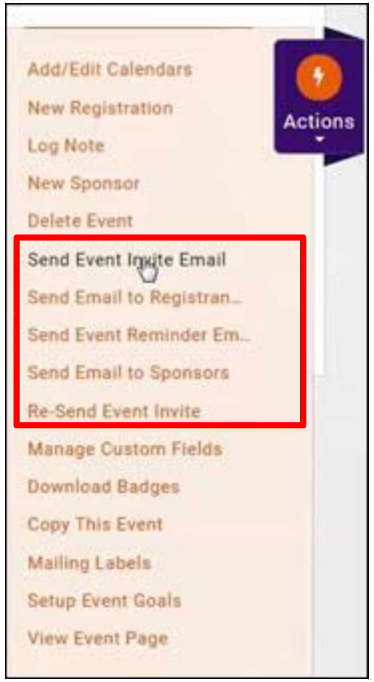
- Updates
- Cancelations
- Waiting List
- Table/Team Assignment

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.

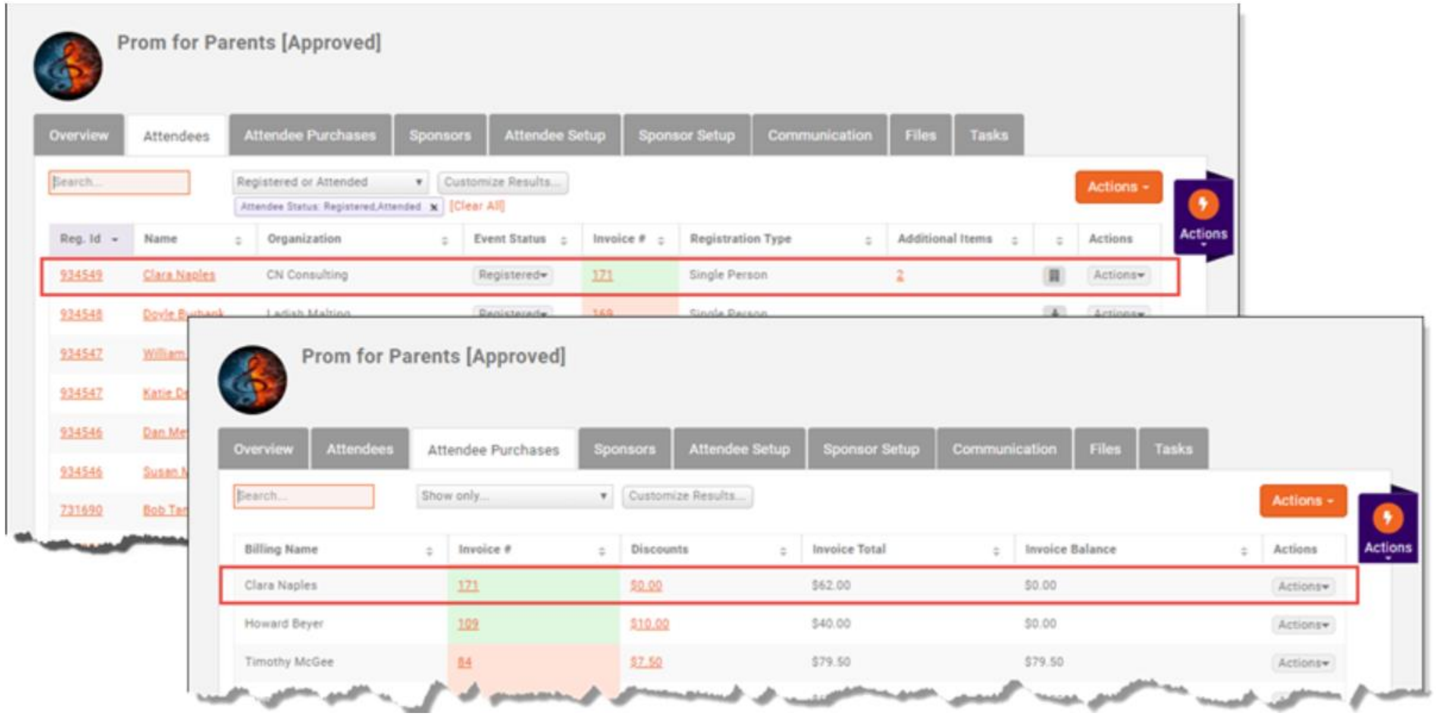
WIKI: Event Communications



Managing Registrations/Attendees

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

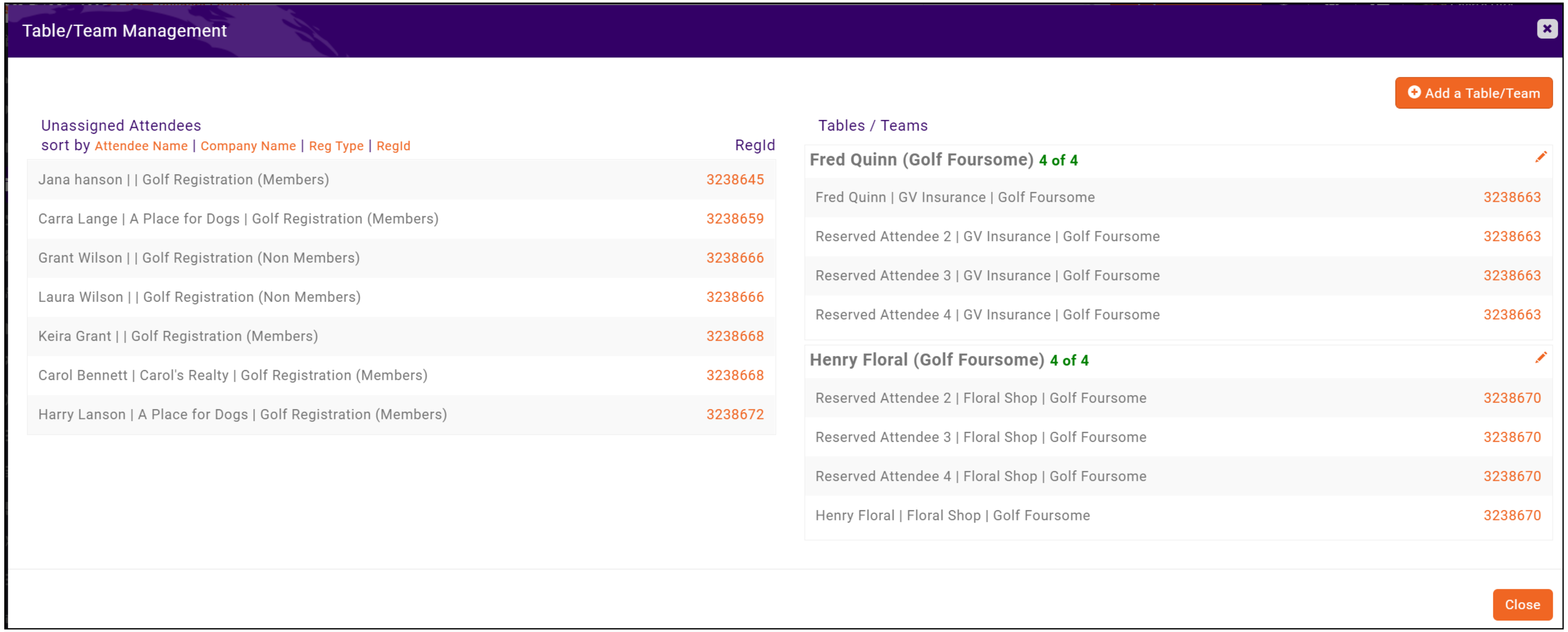
[WIKI: Managing Registrations/Attendees]



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]



Matching Registrants to Contacts

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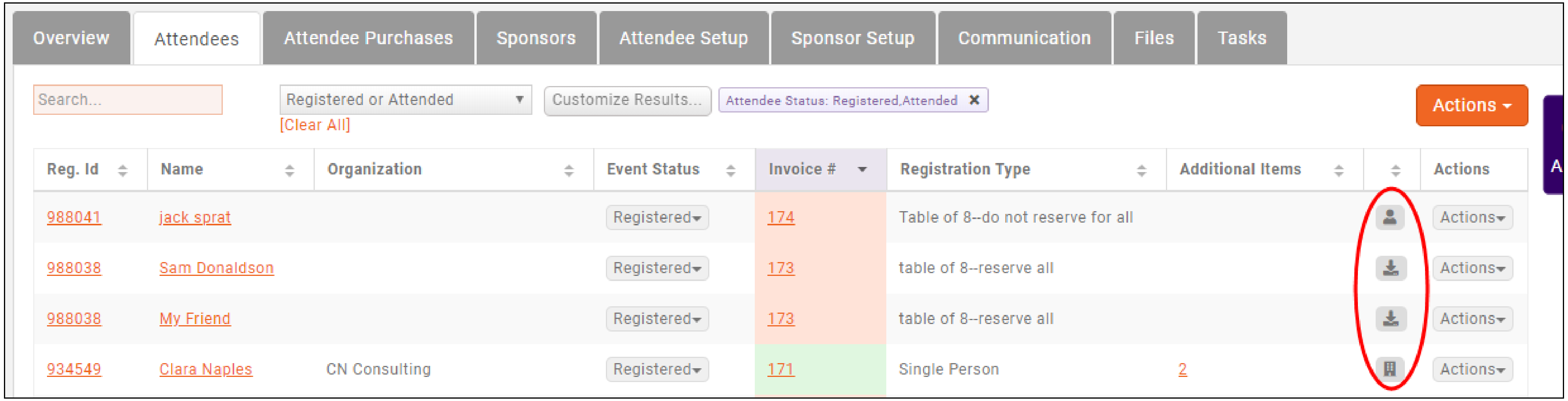
Between the **Additional Items** and the **Actions** columns there is an unnamed column that *may* contain an icon for some registrants. If there **IS** an icon, it means something about the registration doesn't match the data in the system.

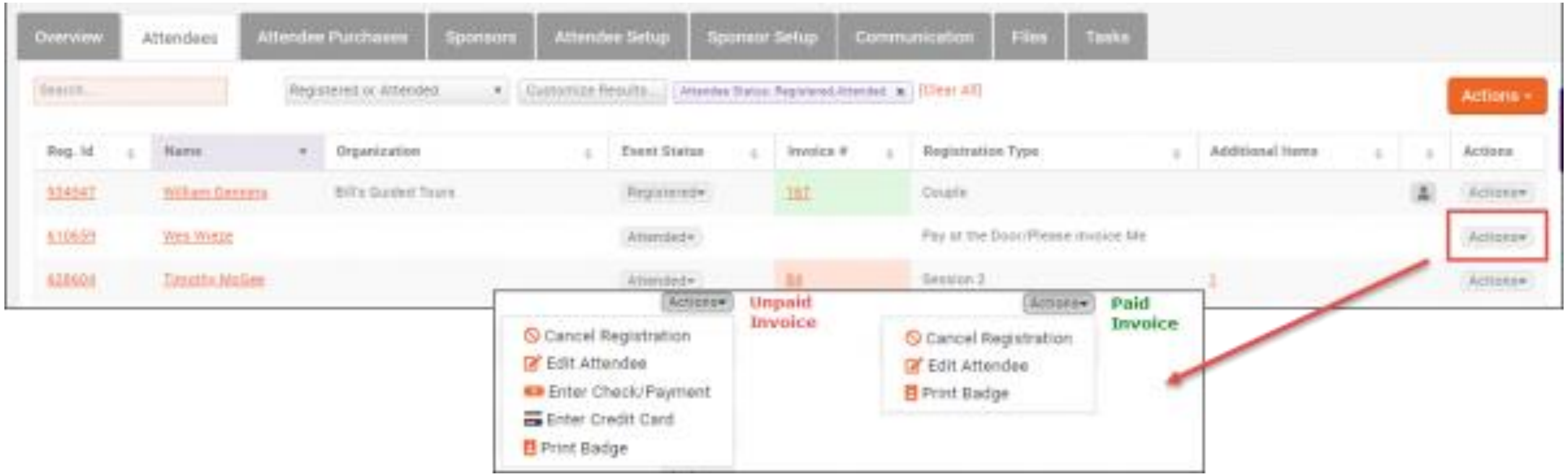
WIKI: [Matching Registrants to Contacts]



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.

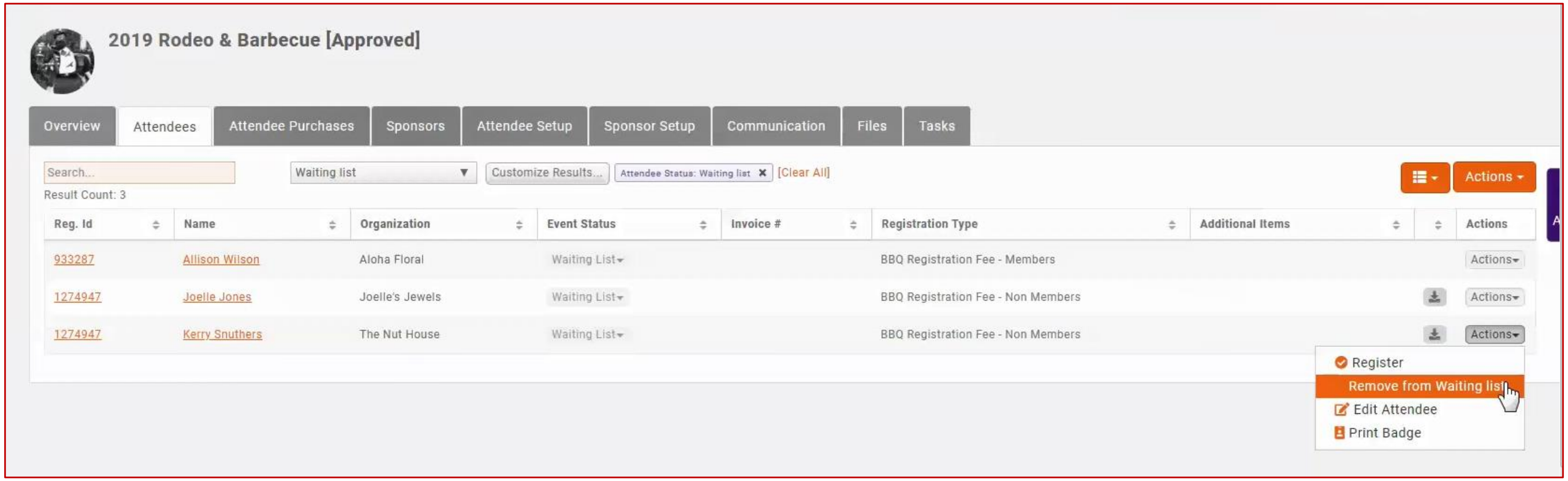
WIKI: [Cancelling a Registration]()



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.

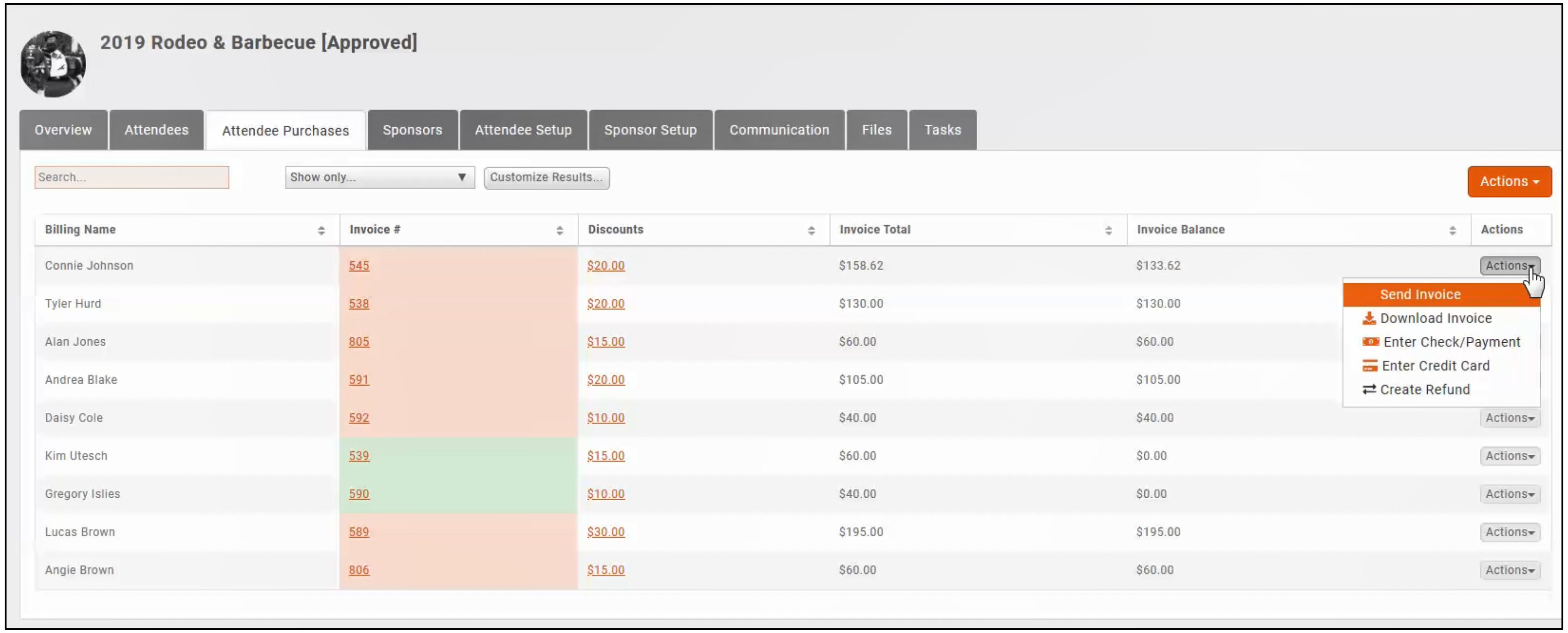
WIKI: [Managing the Waiting List]



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.

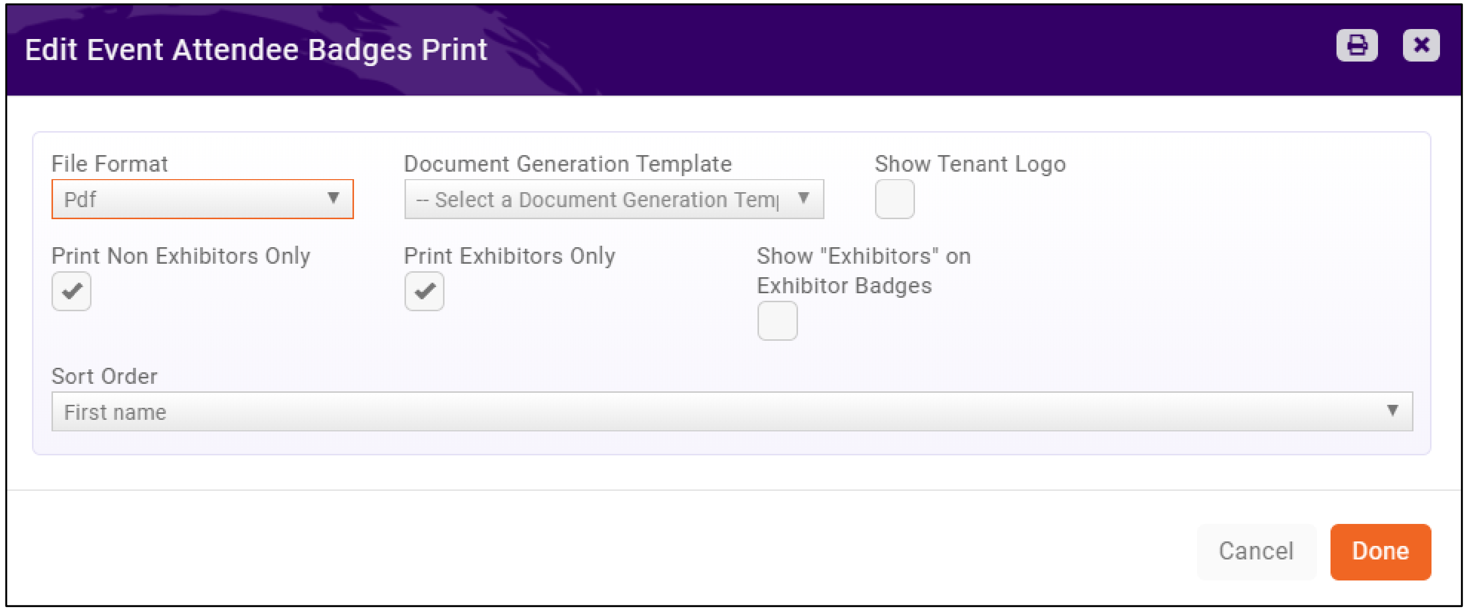
WIKI: [Event Payments & Invoices]



Download Badges

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

WIKI: [Download Name Badges]

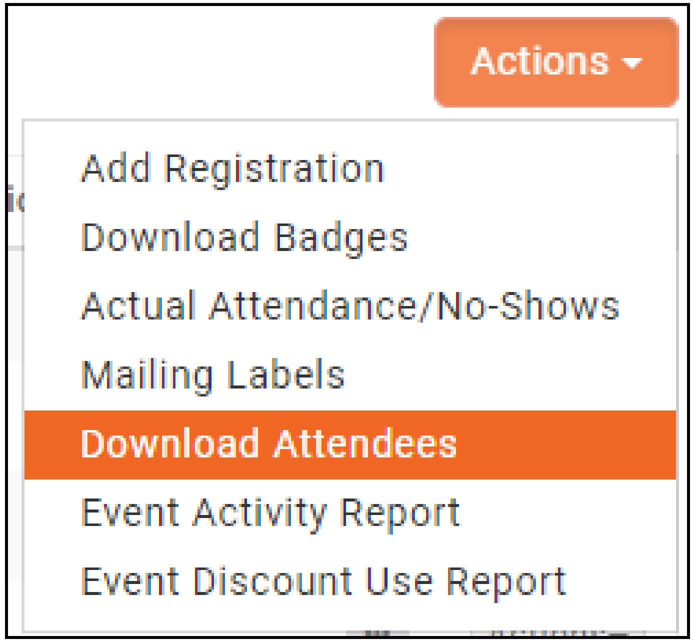


Managing Attendance

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

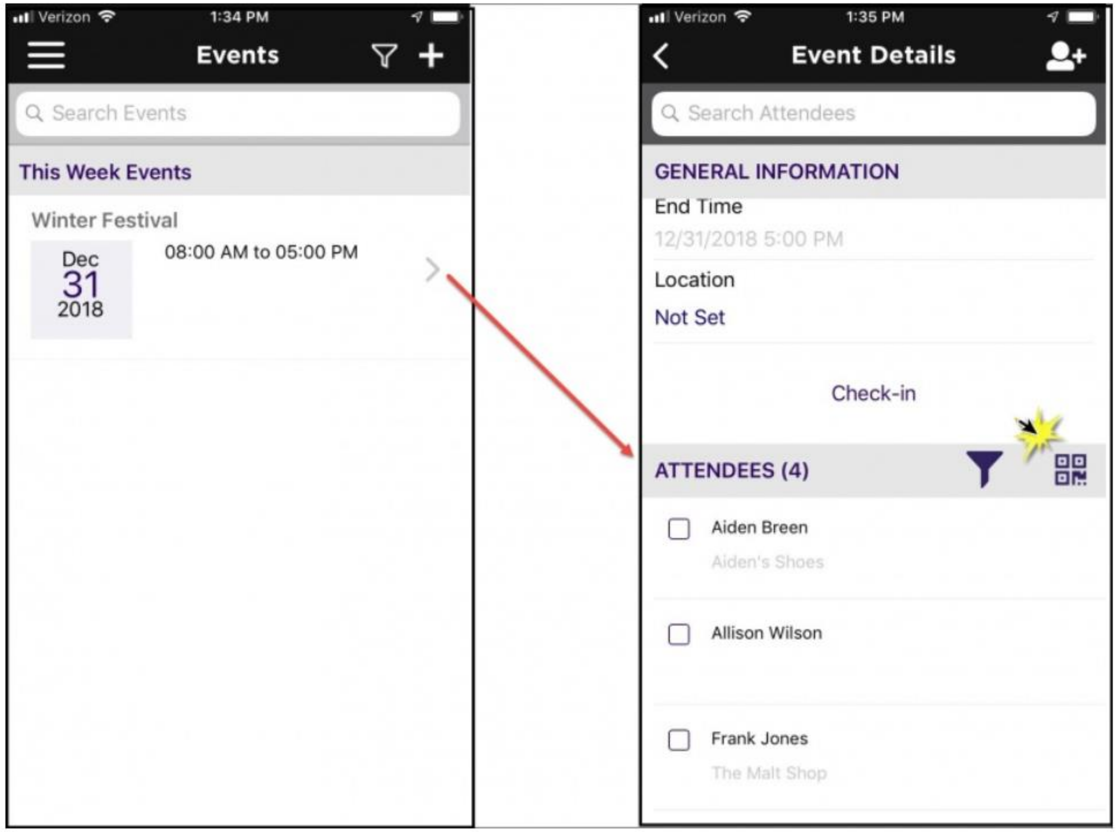
You may check-in your attendees in several ways:

- WIKI: From the Guest List
- WIKI: From the Actions on the Attendees Tab
- WIKI: Using the Staff App

Checking in Attendees

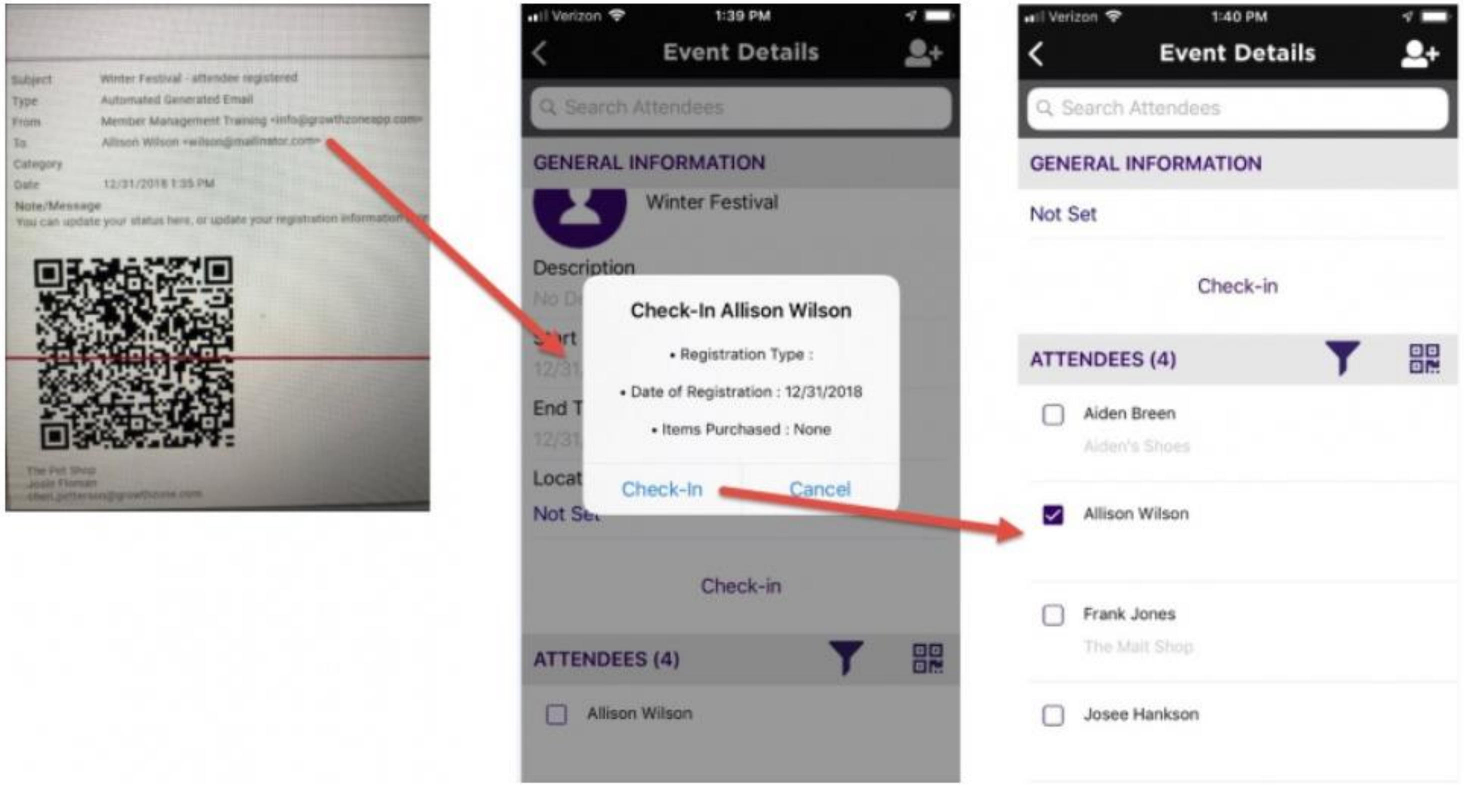
Using the Staff App to Check-in Event Attendees

- 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)

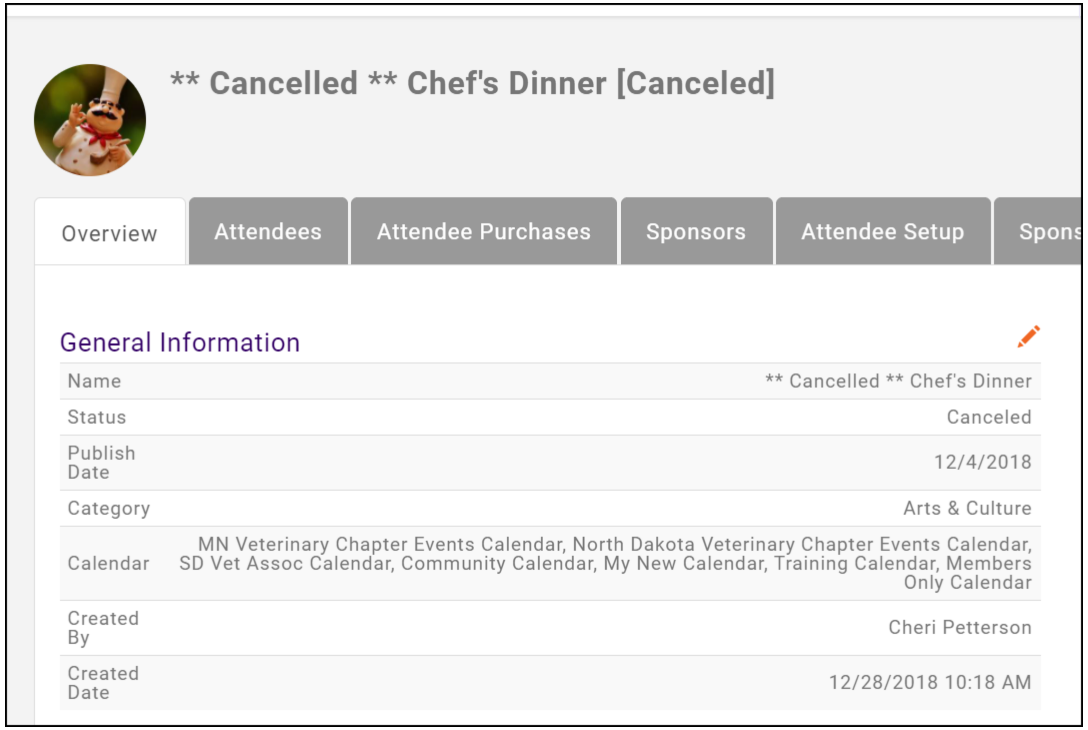
WIKI: Postpone an Event

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

Event Reports

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?

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