

GrowthZone Classroom Training: Managing Events

EVENT SETUP OVERVIEW

Event Defaults

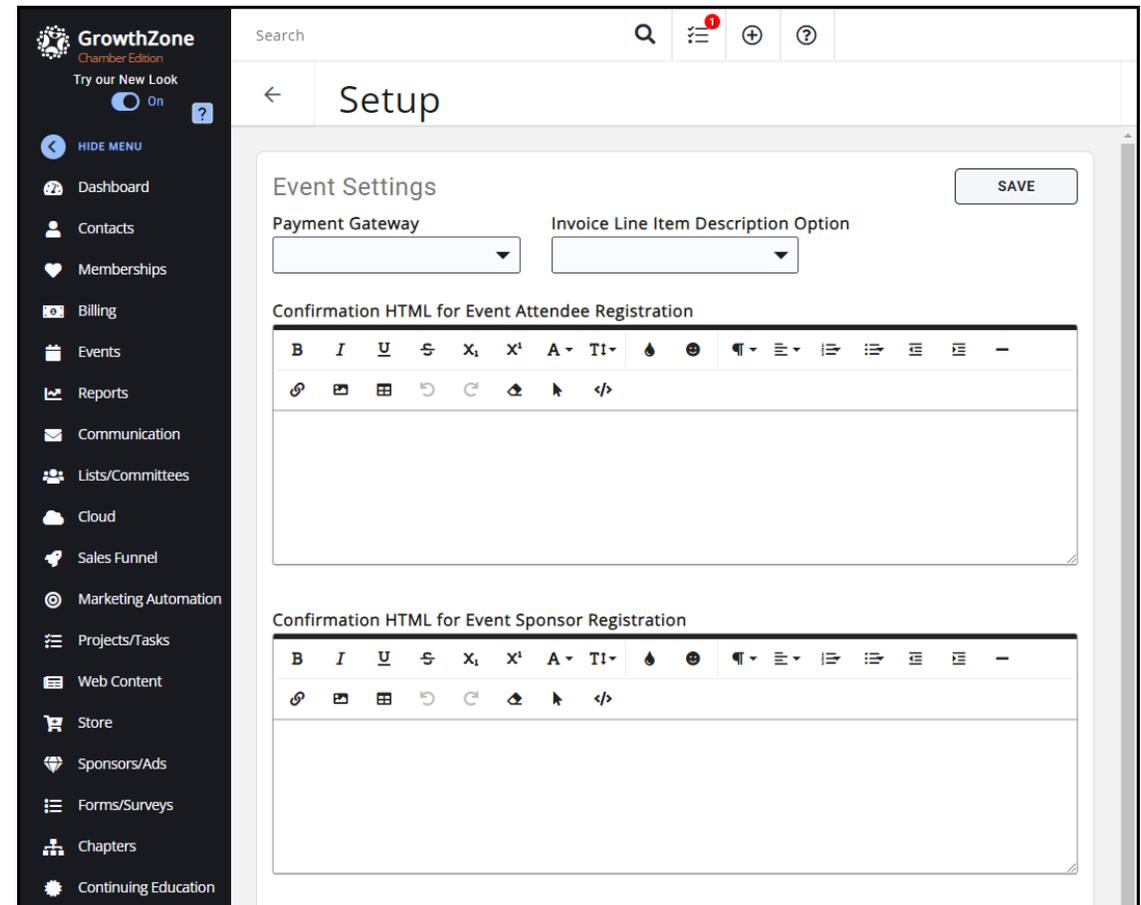
Configure defaults to be used for events

- Save time when creating events
- Can be overridden on event-by-event basis

Default Contact For Event Approval Tasks

Registration custom fields

No Show Fees



The screenshot shows the GrowthZone Chamber Edition interface. On the left is a dark sidebar with a navigation menu including Dashboard, Contacts, Memberships, Billing, Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, and Continuing Education. The main content area is titled 'Setup' and contains 'Event Settings'. It features two dropdown menus: 'Payment Gateway' and 'Invoice Line Item Description Option'. Below these are two rich text editors for 'Confirmation HTML for Event Attendee Registration' and 'Confirmation HTML for Event Sponsor Registration', each with a standard toolbar. A 'SAVE' button is located in the top right corner of the settings panel.

Event Calendars

Create multiple event calendars

Customize display

- Public
- Member-only
- Internal

Allow event submissions by members and/or public

Add Calendar

Name *

Description *

Options

Is Active

Is Public Viewable ⓘ

Is Member Viewable ⓘ

Allow Public Submission ⓘ

Allow Member Submission ⓘ

Calendar Feed ⓘ

Restrictions

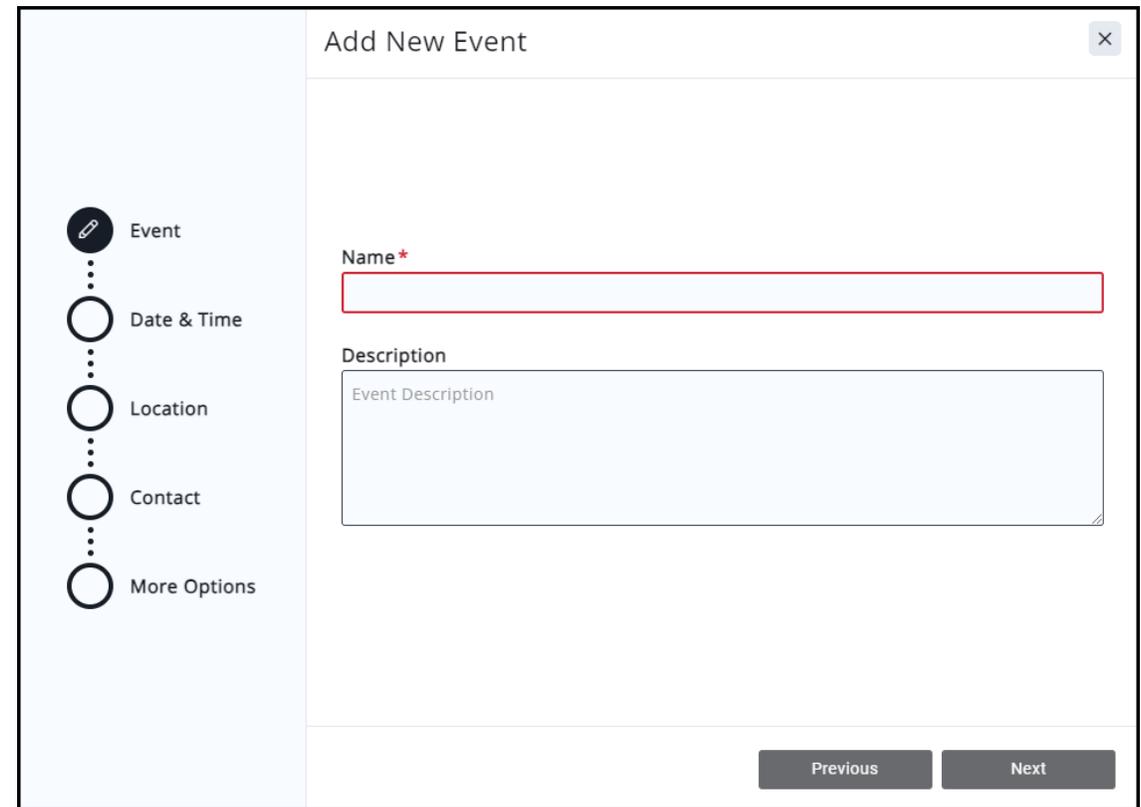
Restrict to List/Committee ⓘ

Cancel Done

Add a New Event

New Event Wizard walks through steps to create an event

- Event Description
- Date & Time
- Location
- Contact
- More Options
 - Category
 - Calendar
 - Sessions/Exhibitors



The screenshot shows a web-based wizard titled "Add New Event" with a close button in the top right corner. On the left side, there is a vertical progress indicator with five steps: "Event" (selected with a pencil icon), "Date & Time", "Location", "Contact", and "More Options". The main content area contains a "Name*" text input field with a red border, followed by a "Description" section with a text area containing the placeholder text "Event Description". At the bottom right, there are two buttons: "Previous" and "Next".

View/Edit Event Details

Event Details found in Overview tab

- Hours
- Location
- Images and video
- Contact information
- Pricing
- Recurrence
- Event Custom Fields

Home Events

Description



The Kalamazoo Area Chamber will present its **24th Annual Golf Tournament**. This public event has been one of the premier chamber events that include not only members of the chamber and area residents but also dignitaries and key community leaders from Kalamazoo and the surrounding communities. The tournament will follow a shotgun start. **Players of all skill levels are welcome to attend this fun event!**

Golfers will make new business connections during this fun day on the links. This is our chamber's biggest fundraising event of the year so come show your support!

The event includes a post-game steak dinner, hot dog luncheon at the turn, pre-game continental breakfast with shrimp cocktails and Bloody Mary bar, warm donuts from the donut truck, and chances to WIN many fabulous prizes!

Not a golfer? No problem!

There are plenty of ways to get involved-no golf skills are required!

Sponsorship Opportunities

Gain exposure for your business with one of many sponsorship opportunities priced to fit every budget-starting at \$150. Opportunities are limited and will fill up quickly.

Marketing Opportunities

Showcase your company's services to local business leaders and gain new customers by donating a raffle prize. Donors will be promoted through event signage and recognized from the podium.

Volunteer Opportunities

Get involved and make new connections by volunteering. Assignments will range from golfer registration to monitoring special contests.

Registration opens on January 30, 2023.
To become a sponsor, please contact info@kalamazoochamber.com or call (123) 456-7890
Presented by The Kalamazoo Downtown Partnership



Pricing

- \$25 per member
- \$200 per non-member
- \$400 per team (no more than 4 players per team, one player must be a member)

Click [here](#) for information on all the extras available for purchase during our tournament!

Interested in **Sponsorship packages** or **Marketing packages**?

Kalamazoo Country Club
1609 Whites Rd
Kalamazoo



[View larger map](#)

1609 Whites Rd.
Kalamazoo, MI 49008

Event Contact
Mary West
(123) 456-7890
[Send Email](#)

Saturday, May 18, 2024 (11:00 AM - 5:00 PM) (CDT)
Registration | 8 - 10:30 a.m.
Shotgun start | 10:30 a.m.
Reception | 3:30 - 5 p.m.

Categories
Community
Just For Fun
Sports & Recreation

Registered Guests
3 [See Attendee List](#)

SETTING UP REGISTRATION TYPES

Registration Options

Overall registration options

- Registration start/end date
- Enable/disable registration
- Enable waiting list
- Show list of registered guests
 - Restrict to members or general public
- Member validation
 - How system determines if registrant is a member to receive member pricing

The screenshot shows a configuration window titled "Overall Registration Options" with the following sections and settings:

- General Settings**
 - Registration Start Date: 1/13/2023 10:53 AM
 - Registration End Date: (empty)
 - Default Start Screen: Sign In de-emphasized
- Max Attendees**: (empty)
- Member Validation**: Anyone (Least Restrictive)
- Enable Registration**:
- Allow Waiting List**:
- Display Sponsor Registration Types**:

Billing and Checkout

- Allow Purchasing of Multiple Registration Types**:
- Allow Invoicing**:
- Include Invoice Link in Confirmation Email**:
- Collect Donations**:

Social Encouragement

- Show Registered Attendees Publicly**:
- Show Registered Attendees to Members**:
- Display Number of Registrants on Event Detail Page**:

Advanced

- Auto Refund Stop Date**: (empty)
- Session Changes Allowed Until**: (empty)

External Registration Link: (empty)

Buttons: Cancel, Done

Registration Form

Registrant's name and email required by default

- Configure additional required fields for registration
- Choose to display optional fields like address, phone number, common name

Configure term for additional attendees

- Guest, Partner, etc.

Registration Form Settings

Options

- Display Address
- Require Address
- Display Phone Number
- Require Phone Number
- Require Additional Attendees Email
- Display Common Name
- Require Company
- Require Title
- Allow Registration Without Session Selection

Additional Attendees Term [ⓘ]

Cancel Done

Event Custom Fields

Create custom fields to add to registration form

- Ex: meal choice, shirt size,

Track additional information about registrant

- Associate individual custom field responses to contact in database

Can be configured for internal-use only

Use previously created fields

Apply custom field to specific registration types

Attendees

Event Registration (Members Only) Attendees

Attendee #1 Total: \$40 - Discounts have been applied

Enter contact name and click search...

First Name Last Name Email Address Company Title

[More Information](#)

Additional Information

Additional Items

Name	Description	Price	Include
Golf Event T-Shirt	Event T-Shirt	\$15	<input type="text" value="0"/>

Event Registration Fees

Registration Types

- Free
- Paid
- Table/Team
- Advanced Type

Limit quantity of registrations available for event

Configure flexible pricing

- Member vs. nonmember

Limit registration types to specific memberships

The screenshot shows a web form titled "Add Simple Paid Registration Type". The form is divided into several sections:

- Name***: A text input field.
- Max Available**: A numeric input field with a value of 0.
- Limit Per Purchase**: A numeric input field with a value of 0.
- Description**: A large text area for entering details.
- Settings**:
 - Availability**: A dropdown menu currently set to "Staff Only".
 - Limit to Memberships**: A dropdown menu with a note below it: "This feature is designed for Members only."
 - Is Displayed For Non-Members**: A checkbox that is currently unchecked.
- Fee Item***: A dropdown menu with a plus sign icon to its right.
- Class Name**: A dropdown menu.
- Price**: A numeric input field with a value of 0.
- Benefit Items**: A dropdown menu.

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

Registration Messaging

Registration instructions

- Display above registration types available
- Customize instructions

Confirmation message

- Displayed upon completion of registration
- Included in confirmation email sent to guests
- Add last minute instructions or reminders

Select Registration Options

Attendee Registration Options

Please note that certain registrations include a number of attendees included in the price. For example, if you want to purchase 1 table of 2 attendees, please choose a quantity of 1.

Name	Price	Quantity
Special Seating (Members Only) Limit: 4 Price includes seating within the first five rows and your choice of available seats. Be sure to call our office to reserve your special seat numbers.	\$200 \$160	- 0 +
Special Seating Non-Members	\$300 \$240	- 0 +

Your attendee registration has successfully been submitted for Music and Wings Festival.

Thank you for registering for our festival. Remember to pack an umbrella as the show will go on rain or shine. If inclement weather (thunderstorms, dangerous winds) should occur, the music and food will be delayed until the storm passes.

Your registration ID is: 9998002

You can find your registration invoice in [here](#). You may wish to add this event to your:

- Google Calendar by clicking [here](#)
- Or to download iCal (Outlook, Apple, or other) click [here](#)

You can update your status [here](#), or update your registration information [here](#).

MANAGING EVENT DISCOUNTS

Discounts

Create variety of discounts

- Early registration
- Promo code
- Membership type
- Volume

Apply to all or selected event fee items

Run report on discount use

- Event Discount Use Report

Add Early Discount

General

Name*

Available Starting On*

Ends On*

Discount Type*

Discount Price

Percentage Amount Set Price To

Applies To (Registration Type)

Total Available 0

Limit Per Purchase 0

Advanced Options

SELLING ADDITIONAL ITEMS

Additional Items

Sell additional, optional items during event registration

Limit quantity of additional item available

- Once limit reached, item marked "Sold Out"

Allow purchase of additional item without requiring registration

Limit purchase to members, non-members, or staff

Additional Event Item

Name* Availability*

Description

Fee Item* Class Name Price*

Items Available [Ⓢ]

Options

For Staff

For Members

For Non-Members

Is Active

Sell Item as Yes/No

MANAGING EVENT REGISTRATIONS

Managing Event Registrations

An event registration consists of attendee information (the Attendees tab) and financial information related to the registration (the Attendee Purchases tab).

Article: [Working with Event Registrations](#)

The screenshot displays the GrowthZone software interface for managing event registrations. The top navigation bar shows the event name 'Golf and Learn Expo September 2023' and buttons for 'VIEW EVENT PAGE' and 'REGISTER'. Below this, a tabbed interface allows switching between 'Attendees' and 'Attendee Purchases'.

Attendees Tab: A table listing registered attendees with columns for Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, and Registrations. The filter 'Attendee Status: Registered' is applied.

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registrations
9269582	Brianna	MacKenzie	MacKenzies	Attended	634	Sing
9269582	Roger	MacKenzie	MacKenzies	Registered	634	Sing
9405547	Reserved Attendee 3	<No Last Name>	The White Council	Registered	641	Tear
9405547	Reserved Attendee 2	<No Last Name>	The White Council	Registered	641	Tear
9405547	Harry	Dresden	The White Council	Registered	641	Tear

Attendee Purchases Tab: A table showing financial details for each attendee, including Billing Name, Ref #, Discounts, Total, Balance, and Actions.

Billing Name	Ref #	Discounts	Total	Balance	Actions
Aaron Ashmore	626 ✓	\$0.00	\$25.00	\$0.00	...
Brianna MacKenzie	634	\$50.00	\$0.00	\$0.00	...
Harry Dresden	641 ✗	\$0.00	\$175.00	\$175.00	...
Jamie Fraser	642 ✗	\$0.00	\$100.00	\$100.00	...
Fergus Fraser	647 ✗	\$0.00	\$100.00	\$25.00	...

Updating a Registration

There are two options for updating a registration:

- Update Registration: for adding more registrations or items to an existing registration
- Edit Attendee: when you need to update or change info for a specific attendee, including changing from one contact to another

The screenshot shows the 'Attendees' tab in the GrowthZone software. The table lists registrations with columns for Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, Registration Type, Table/Team Name, Additional Items, Match, and Actions. A red box highlights the 'Update Registration' and 'Edit Attendee' options in the actions menu for the first row (Brianna MacKenzie).

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name	Additional Items	Match	Actions
9269582	Brianna	MacKenzie	MacKenzies	Attended	634	Single Attendee (Morning G...	MacKenzie/Fraser Team	0	0	Update Registration Edit Attendee View Sessions Resend Confirmation Resend/Send Itinerary Print Badge
9269582	Roger	MacKenzie	MacKenzies	Registered	634	Single Attendee (Morning G...	MacKenzie/Fraser Team	0	0	
9405547	Reserved Attendee 3	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	0	0	
9405547	Reserved Attendee 2	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	0	0	
9405547	Harry	Dresden	The White Council	Registered	641	Team of 4	Gray Team	2	0	
9405547	Reserved Attendee 4	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	0	0	

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 policies and procedures for writing off or refunding payment.

Article: [Cancel an Event Registration](#)

The image shows two screenshots of the 'Attendees' tab in GrowthZone software. The left screenshot, labeled 'Paid Invoice', shows a table with columns for ID, Name, Organization, Registration Status, Invoice ID, Registration Type, Team, and a 'More' menu icon. A red box highlights the 'More' menu icon, which is open to show options: 'Cancel Registration', 'Update Registration', 'Edit Attendee', 'View Sessions', and 'Resend Confirmation'. A green arrow points from the 'Paid Invoice' label to the '642 x' invoice ID in the first row. The right screenshot, labeled 'Unpaid Invoice', shows a similar table with a red box around the 'More' menu icon and a red arrow pointing from the 'Unpaid Invoice' label to the '641 x' invoice ID in the first row.

ID	Name	Organization	Registration Status	Invoice ID	Registration Type	Team	More
9446377	Jamie	Fraser	Registered	642 x	Single Attendee (Afternoon...	Mackenzie/Fraser Team	⋮
9524587	William	Wizard	Registered	648 ✓	Single Attendee (Afternoon...	Team of 4	⋮
9524629	Jack	Reacher	Attended	649 ✓	Single Attendee (Afternoon...	Team of 4	⋮
9635360	Alicia	Snow	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	⋮
9635360	Cally	Cupcakes	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	⋮
9635815	Robert	Smith	Registered	659 ✓	New Single Regtype		⋮

ID	Name	Organization	Registration Status	Invoice ID	Registration Type	Team	More
The White Council			Registered	641 x	Team of 4	Gray Team	⋮
The White Council			Registered	641 x	Team of 4	Gray Team	⋮
Wizard's Supply Co			Registered	642 x	Single Attendee (Afternoon...	MacKenzie/Fraser Team	⋮
9524629	Jack	Reacher	Attended	649 ✓	Single Attendee (Afternoon...	Team of 4	⋮
9635360	Alicia	Snow	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	⋮
9635360	Cally	Cupcakes	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	⋮
9635815	Robert	Smith	Registered	659 ✓	New Single Regtype		⋮

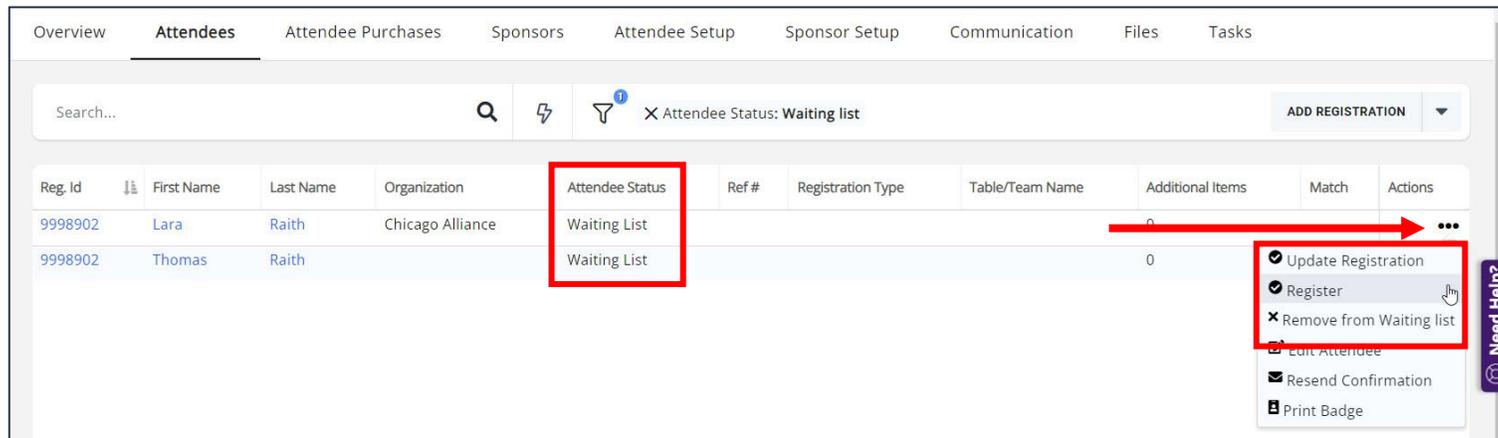
Paid Invoice

Unpaid Invoice

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.

Article: [Managing the Waiting List](#)



The screenshot shows the 'Attendees' tab in a software interface. The 'Attendee Status' column is highlighted in red. A red arrow points from the 'Attendee Status' column to the 'Actions' column, which contains a dropdown menu with options like 'Update Registration', 'Register', 'Remove from Waiting list', 'Edit Attendee', 'Resend Confirmation', and 'Print Badge'.

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name	Additional Items	Match	Actions
9998902	Lara	Raith	Chicago Alliance	Waiting List				0		...
9998902	Thomas	Raith		Waiting List				0		...

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

Table/Team Management

Drag and drop Unassigned attendees to desired table/team. See details [here](#).
Request missing attendee names. [Learn how](#).

Unassigned Attendees
sort by [Attendee Name](#) | [Company Name](#) | [Reg.Type](#) | [RegId](#)

	RegId
Robert Smith New Single Regtype	9635815
Babydog Wizard Wizard's Supply Co- Deerwood Exhibitor Staff	9680401
Alexander Wizard Wizards Exhibitor Staff	9680401
Shelly Wizard Cami's Jammies Exhibitor Staff	9680401
William Wizard Wizard's Supply Co Exhibitor Staff	9680401

ADD A TABLE/TEAM REQUEST RESERVED ATTENDEE NAMES

Tables / Teams

Gray Team (Team of 4) 4 of 4

Harry Dresden The White Council Team of 4	9405547
Reserved Attendee 2 The White Council Team of 4	9405547
Reserved Attendee 3 The White Council Team of 4	9405547
Reserved Attendee 4 The White Council Team of 4	9405547

MacKenzie/Fraser Team (Team of 4) 3 of 4

Jamie Fraser Single Attendee (Afternoon Golf)	9446377
Brianna MacKenzie MacKenzies Single Attendee (Morning Golf)	9269582
Roger MacKenzie MacKenzies Single Attendee (Morning Golf)	9269582

New Table/Team (Team of 4) 4 of 4

Jack Wizard Wizards Exhibitor Staff	9680401
Karrin Murphy Chicago Alliance Comp Ticket	9866582

Close

Article: [Table/Team Management](#)

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.

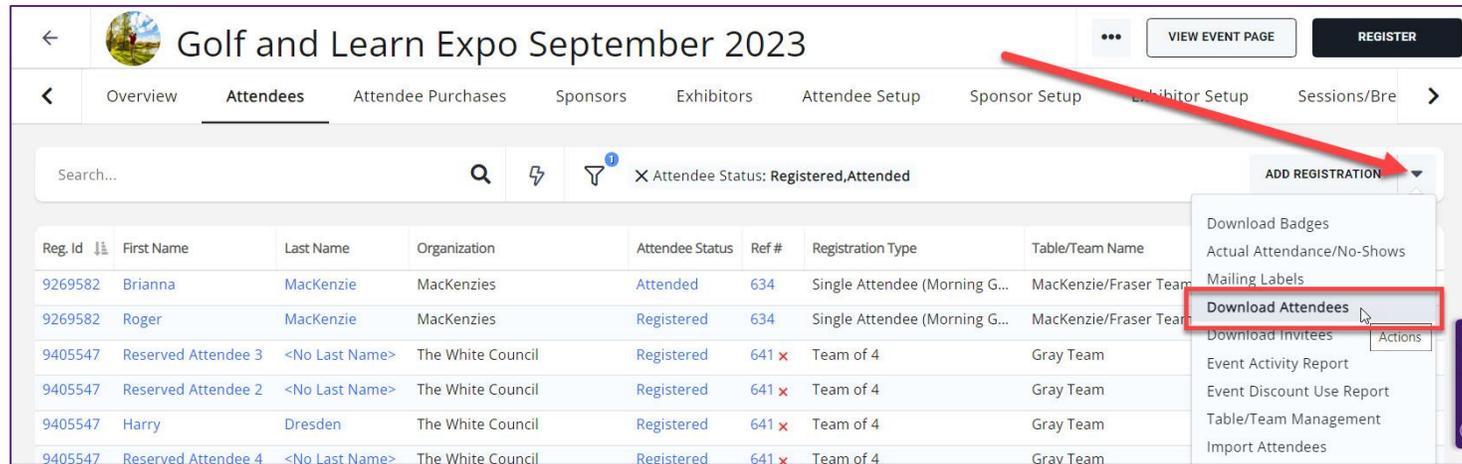
Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name	Additional Items	Match	Actions
9998847	Walter	Butters	Knights of the Sword	Registered				0		...
9998847	Sanya	NLA	Knights of the Sword	Registered				0		...
9998863	Hope	Carpenter		Registered				0	✗	...
9998863	Daniel	Carpenter		Registered				0	✗	...
9998863	Michael	Carpenter	Knights of the Sword	Registered				0		...
9998863	Charity	Carpenter		Registered				0	✗	...
9998876	Anastasia	Luccio		Registered				0		...
9998876	Harry	Dresden	The White Council	Registered				0		...
9998886	Johnny	Marcone	Chicago Alliance	Registered				0		...
9998886	Karrin	Murphy	Chicago Alliance	Registered				0		...

Article: [Matching Registrants to Contacts](#)

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



The screenshot displays the 'Attendees' tab for the 'Golf and Learn Expo September 2023' event. The interface includes a search bar, a filter for 'Attendee Status: Registered, Attended', and a table of attendees. The table has the following columns: Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, Registration Type, and Table/Team Name. The 'Actions' button in the top right corner of the table is highlighted with a red arrow, and its dropdown menu is open, showing various options. The 'Download Attendees' option is highlighted in red in the dropdown menu.

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name
9269582	Brianna	MacKenzie	MacKenzies	Attended	634	Single Attendee (Morning G...	MacKenzie/Fraser Team
9269582	Roger	MacKenzie	MacKenzies	Registered	634	Single Attendee (Morning G...	MacKenzie/Fraser Team
9405547	Reserved Attendee 3	<No Last Name>	The White Council	Registered	641 x	Team of 4	Gray Team
9405547	Reserved Attendee 2	<No Last Name>	The White Council	Registered	641 x	Team of 4	Gray Team
9405547	Harry	Dresden	The White Council	Registered	641 x	Team of 4	Gray Team
9405547	Reserved Attendee 4	<No Last Name>	The White Council	Registered	641 x	Team of 4	Gray Team

Article: [Check-in Roster](#)

Checking in Attendees

You may check-in your attendees in several ways:

- [From the Guest List](#)
- [From the Attendees tab](#)
- [Using the Staff App](#)

Edit Attendance/No-Shows ✕

Search

Attendee Status	Reg. Id	First Name	Last Name	Organization	Attended/Showed
Registered	11089274	Tracy	Dockter	Crooked Lake Floral	No
Registered	11350556	Shelly	Bike	Shelly's Bike Rental	No
Registered	11350556	Reserved Attendee 4		Shelly's Bike Rental	No <input type="checkbox"/>
Registered	11127813	Reserved		Bav Lake Coffee	No <input type="checkbox"/>

THANK YOU!!!