

# GrowthZone – Event Setup

# Agenda

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- Overview of Event Page
- Event Default Settings
- Setting up an Event
  - Add Event Registration Fees
  - Add Event Custom Fields
  - Add Event Discounts

# GrowthZone Event Management

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Create and manage every aspect of an event from within the Events module

- Setup your event page
- Member & non-member pricing
- Publications, Invitations and other communication
- Registration and Check-in
- Invoicing and Payments
- Reporting

# Event Defaults

← Setup

Event Settings SAVE

Payment Gateway  Invoice Line Item Description Option

Confirmation HTML for Event Attendee Registration

**B I U** **A T1**

Confirmation HTML for Event Sponsor Registration

**B I U** **A T1**

Default Contact For Event Approval Tasks  Default Calendar

Options

- Display Registration Descriptions by Default
- Enable Individual Custom Fields on Registration Form
- Display Associated Individuals Upon Email Match

No Show Fees

- Charge No Show Fee on Subsequent Registration

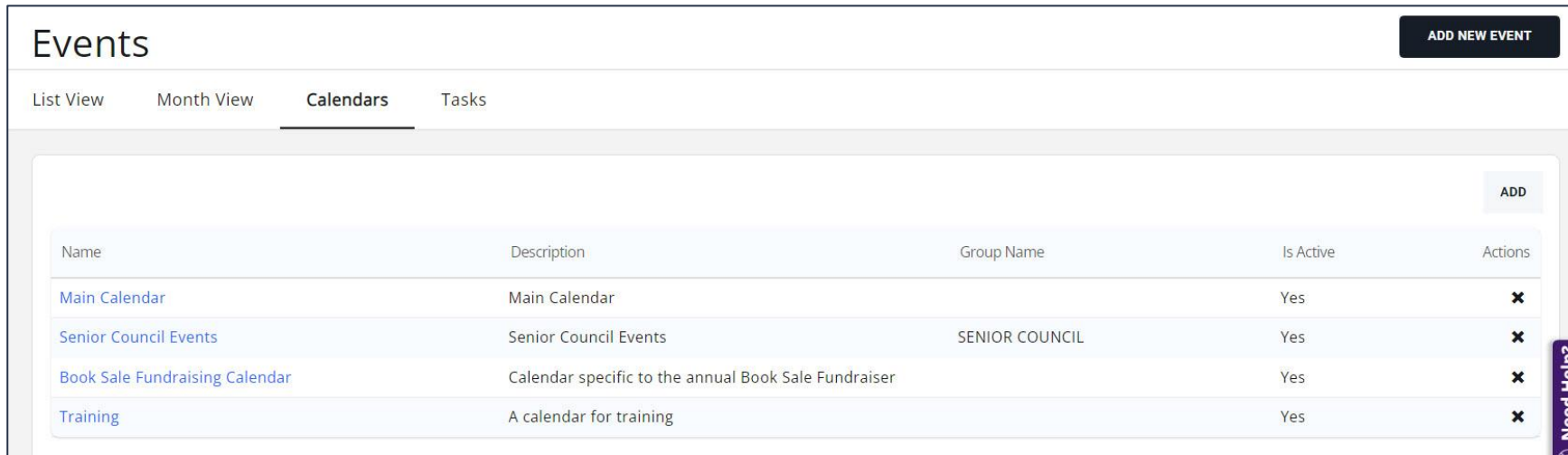
The Event Settings options allow you to configure the defaults to be used for your events.

## KB: Event Defaults

# Event Calendars

To display your events, you will need to setup your calendars.

KB: [Calendars](#)



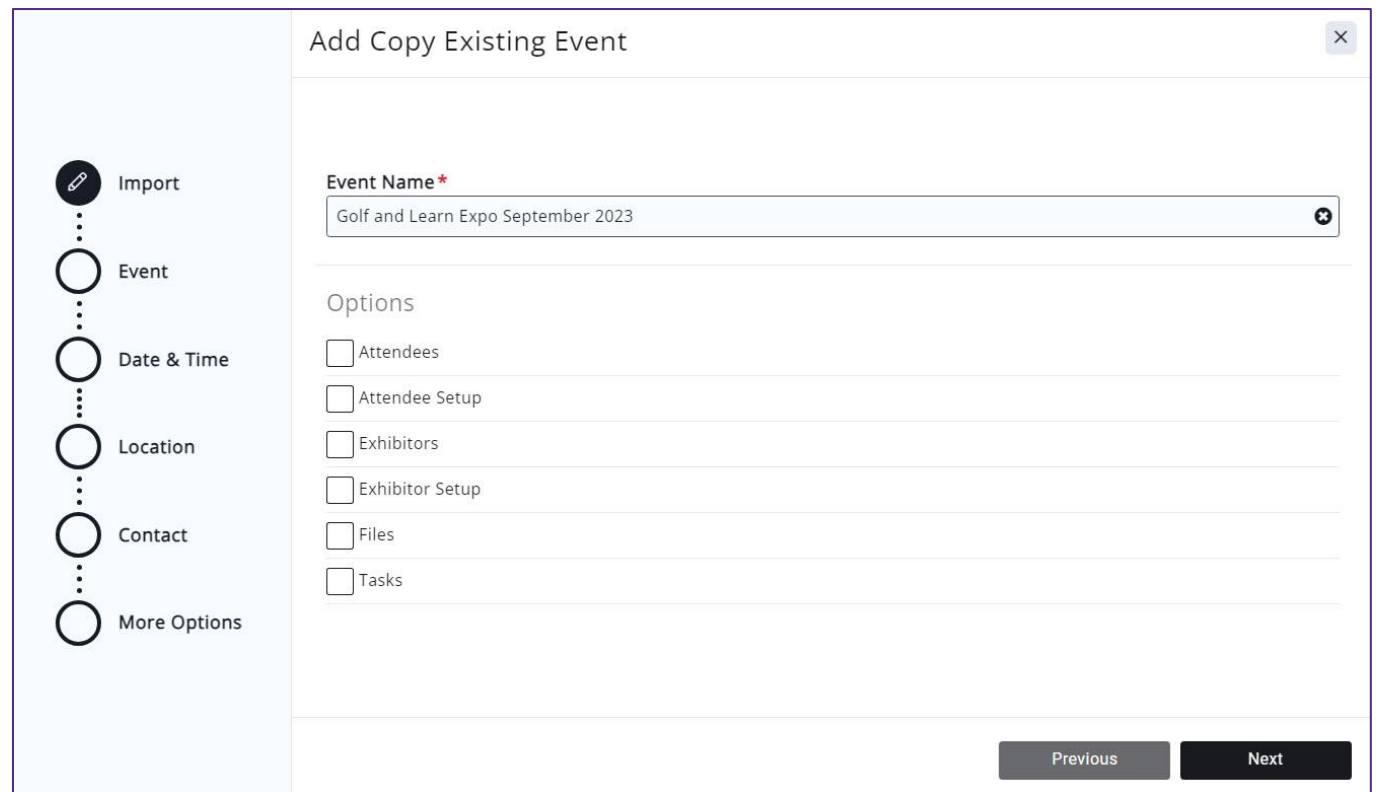
The screenshot shows a web interface for managing event calendars. At the top, there is a header "Events" and a button "ADD NEW EVENT". Below the header, there are navigation tabs: "List View", "Month View", "Calendars" (which is selected), and "Tasks". The main content area displays a table of calendars with the following columns: Name, Description, Group Name, Is Active, and Actions. The table contains four rows of data. An "ADD" button is located in the top right corner of the table area. A vertical "Need Help?" button is on the right side of the table.

Name	Description	Group Name	Is Active	Actions
<a href="#">Main Calendar</a>	Main Calendar		Yes	✕
<a href="#">Senior Council Events</a>	Senior Council Events	SENIOR COUNCIL	Yes	✕
<a href="#">Book Sale Fundraising Calendar</a>	Calendar specific to the annual Book Sale Fundraiser		Yes	✕
<a href="#">Training</a>	A calendar for training		Yes	✕

# Copy an Existing Event

If you run the same events regularly, you can copy an existing event and save yourself some setup time. You can determine key setup items you would like to copy, such as Attendee Setup, Tasks, Files, etc.

KB: [Copy an Event](#)



The screenshot shows a web interface for copying an existing event. On the left is a vertical navigation menu with icons and labels: 'Import' (pencil icon), 'Event' (circle icon), 'Date & Time' (circle icon), 'Location' (circle icon), 'Contact' (circle icon), and 'More Options' (circle icon). The main area is titled 'Add Copy Existing Event' and contains a text input field for 'Event Name\*' with the value 'Golf and Learn Expo September 2023'. Below this is an 'Options' section with several checkboxes: 'Attendees', 'Attendee Setup', 'Exhibitors', 'Exhibitor Setup', 'Files', and 'Tasks'. At the bottom right of the form are 'Previous' and 'Next' buttons.

# Setup a Recurring Event

Event Series ✕

Series Name\*  
Board Meeting Series

Series Description

Series Start Date\* 6/5/2023

Series End Date 12/31/2024

Recurrence Pattern\* Monthly

Relative Day

On the First

Day of The Week Wednesday

Every n months 1

Future Events With Registrations Or Sponsors

Event Name	Start Date	End Date	Attendee Count	Sponsor Count	Exhibitor Count
None to display					

Delete Cancel Done

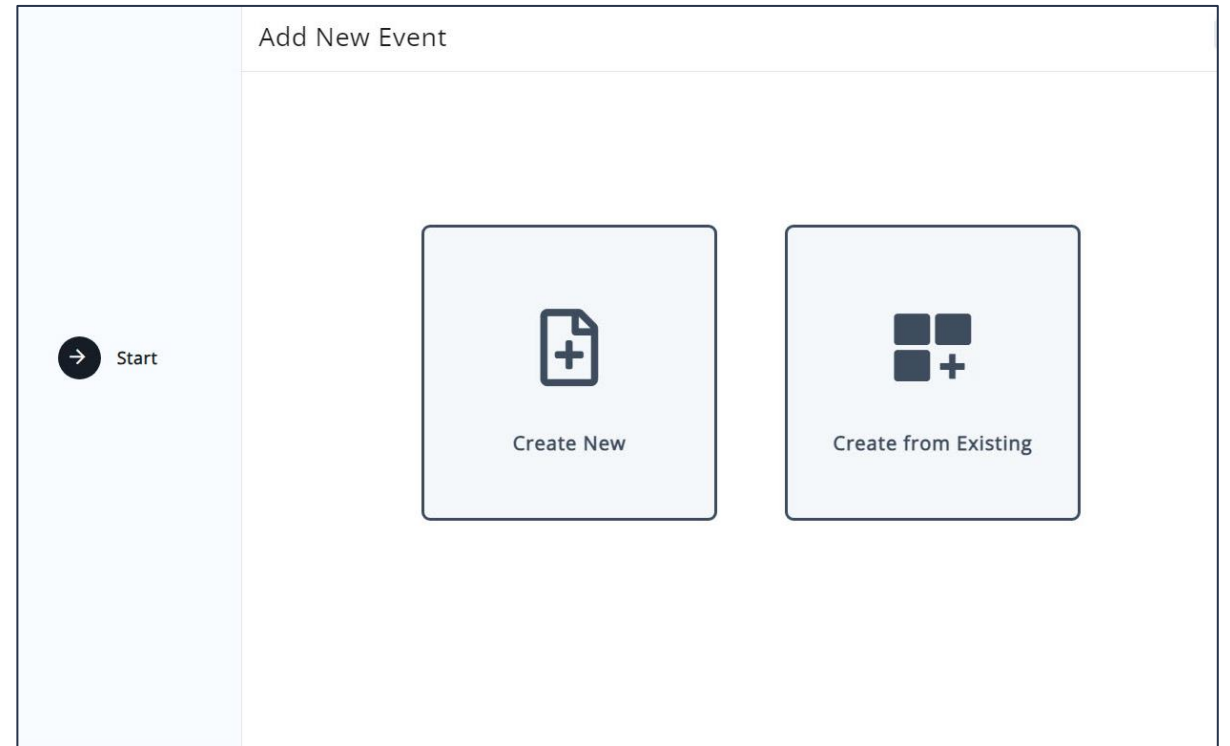
If your association has an event which occurs on a regular basis, save time by setting it up as a recurring event

KB: [Set up a Recurring Event](#)

# Add a New Event

You may add a new event by clicking the **Quick Add** button in the header bar, or by clicking the **Add New Event** button in the Events module.

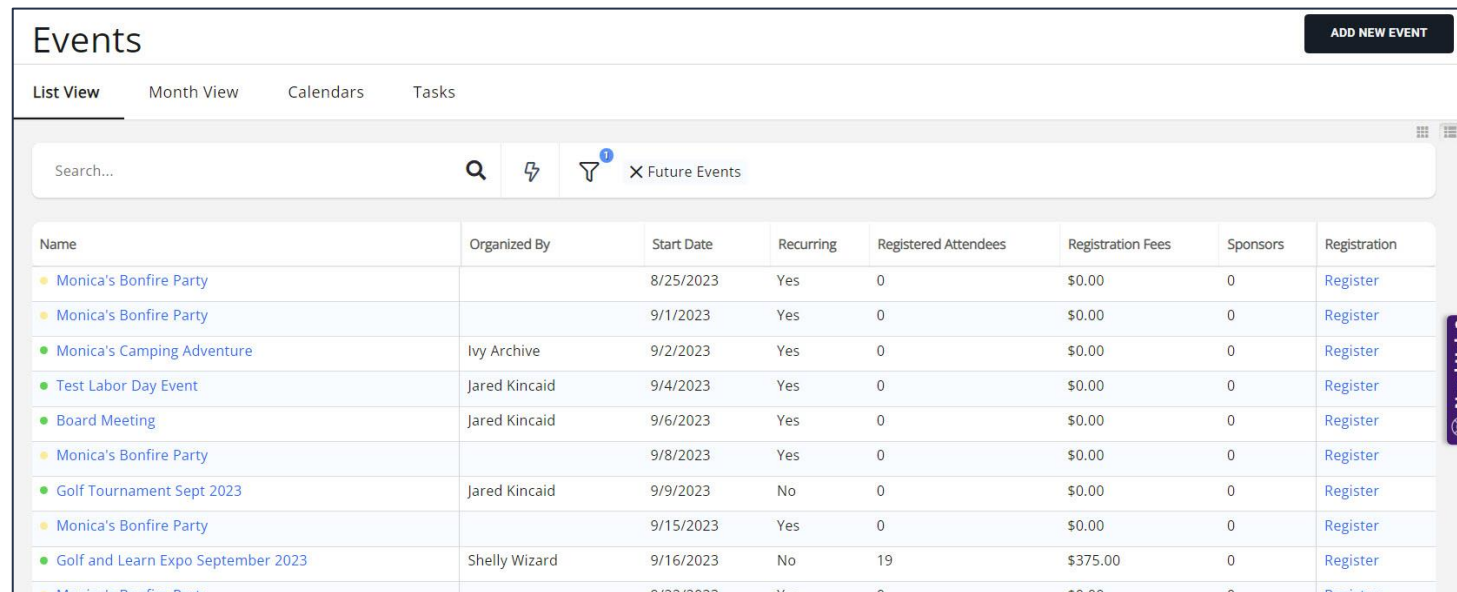
KB: [Add a New Event](#)





# View Events

You may view your events by selecting Events in the Navigation Panel OR you may type the event name in the Search box in the header bar. Clicking on the name of the event will open the event.



The screenshot displays the 'Events' management interface. At the top right, there is a button labeled 'ADD NEW EVENT'. Below this, there are navigation tabs for 'List View', 'Month View', 'Calendars', and 'Tasks', with 'List View' being the active tab. A search bar is located below the tabs, containing the text 'Search...' and a magnifying glass icon. To the right of the search bar, there are icons for a lightning bolt, a funnel, and a notification bell with a '1' next to it. Below the search bar, there is a table of events. The table has the following columns: Name, Organized By, Start Date, Recurring, Registered Attendees, Registration Fees, Sponsors, and Registration. The table contains several rows of event data, including 'Monica's Bonfire Party', 'Monica's Camping Adventure', 'Test Labor Day Event', 'Board Meeting', 'Golf Tournament Sept 2023', and 'Golf and Learn Expo September 2023'. A vertical 'Need Help?' button is located on the right side of the table.

Name	Organized By	Start Date	Recurring	Registered Attendees	Registration Fees	Sponsors	Registration
Monica's Bonfire Party		8/25/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Monica's Bonfire Party		9/1/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Monica's Camping Adventure	Ivy Archive	9/2/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Test Labor Day Event	Jared Kincaid	9/4/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Board Meeting	Jared Kincaid	9/6/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Monica's Bonfire Party		9/8/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Golf Tournament Sept 2023	Jared Kincaid	9/9/2023	No	0	\$0.00	0	<a href="#">Register</a>
Monica's Bonfire Party		9/15/2023	Yes	0	\$0.00	0	<a href="#">Register</a>
Golf and Learn Expo September 2023	Shelly Wizard	9/16/2023	No	19	\$375.00	0	<a href="#">Register</a>
Monica's Bonfire Party		9/23/2023	Yes	0	\$0.00	0	<a href="#">Register</a>

# Edit Event Details

Event details may be added or changed on the Event's Overview Tab.

KB: [Edit Event Details](#)

← Golf and Learn Expo September 2023

VIEW EVENT PAGE REGISTER

Overview Attendees Attendee Purchases Sponsors Exhibitors Attendee Setup Sponsor Setup Exhibitor Setup Sessions/Bre

Goals

- 19 ATTENDEES Goal: 0 ADD ATTENDEE
- \$375.00 ATTENDEE REVENUE Goal: \$0.00 ADD ATTENDEE
- 0 SPONSORS Goal: 0 ADD SPONSOR
- \$0.00 SPONSOR REVENUE Goal: \$0.00 ADD SPONSOR
- 2 EXHIBITORS Goal: 0 ADD EXHIBITOR
- \$525.00 EXHIBITOR REVENUE Goal: \$0.00 ADD EXHIBITOR

Registrations

Name	Registered	Attended	Total	Paid/Free	Unpaid
Comp Ticket	1	0	\$0.00	1	0
Exhibitor Staff	5	0	\$25.00	0	5
New Single Regtype	1	0	\$25.00	1	0
Single Attendee (Afternoon Golf)	6	1	\$200.00	4	2
Single Attendee (Morning Golf)	2	1	\$0.00	2	0

General Information

- Name: Golf and Learn Expo September 2023
- Status: Approved
- Publish Date: 7/28/2022
- Category: Continuing Education, Sports and Recreation, No Show Fee - \$10, No Show Fee - \$15, Test Type 1, Test Type 2
- Calendar: Main Calendar
- Created By: Shelly Satre
- Created Date: 7/28/2022 12:49 PM
- Total Invitation: 96

# Registration Options

Your event registration form, fees, discounts, and so on, are setup on an Event's **Attendee Setup** tab

The screenshot shows the 'Attendee Setup' configuration page for the 'Golf and Learn Expo September 2023' event. The page includes a navigation menu with tabs for Overview, Attendees, Attendee Purchases, Sponsors, Exhibitors, Attendee Setup (selected), Sponsor Setup, Exhibitor Setup, and Sessions/Bre. The main content area is divided into several sections:

- Registration Link:** A public registration URL is provided: <https://thearchive.growthzoneapp.com/ap/Events/Register/yr46BdAP>.
- Overall Registration Options:** A list of settings including 'Enable Registration' (Yes), 'Registration Start Date' (7/28/2022 12:00 AM), 'Registration End Date', 'Max Attendees' (20), and 'Allow Invoicing' (No).
- Registration Form Settings:** A list of form requirements including 'Display Address', 'Require Address', 'Display Phone Number', 'Require Phone Number', and 'Require Additional Attendees Email', all currently set to 'No'.
- Registration Types:** A table listing different registration options.

Name	Price	Available to Members	Available to Non-Members	Registration Limit	Registered	
Single Attendee (Morning Golf)	\$25.00	Yes	No	3	2	...

KB: [Registration Options](#)

# Registration Options

Overall Registration Options

Registration Start Date: 7/28/2022 12:00 AM  
Registration End Date:   
Auto Refund Stop Date:   
Max Attendees: 20  
External Registration Link:   
Options:  
 Enable Registration  
 Allow Waiting List  
 Show Registered Attendees Publicly  
 Show Registered Attendees to Members  
 Collect Donations  
 Allow Invoicing  
 Allow Purchasing of Multiple Registration Types  
 Display Number of Registrants on Event Detail Page  
Member Validation:  
Note: by default, if a member logs in, they will always be validated as a member  
Email address exact match  
Session Changes Allowed Until:   
Cancel Done

You can configure: your registration open/end dates, maximum attendees, visibility, and so on under the **Overall Registration Options**.

KB: [Setup Overall Registration Options](#)

# Registration Form

By default, the registration form for an event will require name and email address. You may configure any additional fields you wish to require on the registration form

KB: [Registration Form Settings](#)

### 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 Registration Fees

The registration fees for your event are configured in the **Registration Types** section of the **Attendee Setup** tab.

KB: [Event Fees-Registration](#)

Registration Types						ACTIONS ▾
	Name	Price	Available to Members	Available to Non-Members	Registrat	
⋮	Single Attendee (Morning Golf)	\$25.00	Yes	No	3	⋮
⋮	Single Attendee (Afternoon Golf)	\$25.00	Yes	No	0	6 ⋮
⋮	Comp Ticket	\$0.00	No	No	0	1 ⋮

# Event Fees—Discounts

Any event may have special discounts (based on early registration, promo code, or membership type, or volume) available and applied to all or selected fees.

KB: [Event Fees-Discounts](#)

The screenshot shows the 'Registration Discounts' interface. At the top, there is a table with columns: Global, Name, Promo Code, Start Date, End Date, Applies To, and Reg. Type. A red arrow points to the 'ACTIONS' dropdown menu in the top right corner, which contains the following options: 'Add Early Registration Discount', 'Add Promo Code Discount', 'Add Discount for Membership Type', and 'Add Volume Discount'.

Four modal windows are open, each for adding a specific type of discount:

- Add Early Discount:** Includes fields for Name, Available Starting On, Ends On, and Discount Type (Early Bird Discount). It also has sections for Discount Price (Percentage, Amount, Set Price To) and Applies To (Registration Type), Total Available, and Limit Per Purchase.
- Add Promotion Code Discount:** Includes fields for Name, Available Starting On, Ends On, Promotion Code, and Discount Type (Promo Code Discour). It also has sections for Discount Price and Applies To, Total Available, and Limit Per Purchase.
- Add Membership Type Discount:** Includes fields for Name, Available Starting On, Ends On, Membership Type, and Discount Type (Membership Type D). It also has sections for Discount Price and Applies To, Total Available, and Limit Per Purchase.
- Add Volume Discount:** Includes fields for Name, Available Starting On, Ends On, Minimum Quantity, and Discount Type (Test Volume Discou). It also has sections for Discount Price and Applies To, Total Available, and Limit Per Purchase.

Each modal window has an 'Advanced Options' checkbox, a 'Cancel' button, and a 'Done' button.

# Event Fees—Additional Items

If you wish to sell additional items during the event registration process these items may be added in the **Additional Items** section on the **Attendee Setup** tab

KB: [Event Fees- Additional Items](#)

Additional Event Item ✕

Name\*  Availability\* For Attendees ▾

Description

Fee Item\* ▾ Class Name ▾ Price\*

Items Available <sup>ⓘ</sup>

Options

For Staff

For Members

For Non-Members

Is Active

Sell Item as Yes/No

Cancel Done



# Event Custom Fields

You can easily create custom fields to add to the Event Registration form. For Example, if you are offering meal choices for your annual banquet, you can gather this information from registrants via custom fields.


KB: [Event Custom Fields](#)

Custom Fields					
Object Type	Display Name	Field Data Type	Archived	Registration Type (V2 Only)	
Event Registration	Handicap	Integer	No	Single Attendee (Morning Golf), Single Attendee (Afternoon Golf)	...
Event Registration	HoleChoice	Dropdown	No	Single Attendee (Morning Golf), Single Attendee (Afternoon Golf)	...
Individuals	Food Sensitivities - Golf	Dropdown with Fill-in	No		...
Individuals	Meal Considerations	Dropdown with Fill-in	No		...
Individuals	License	Text	No		...

# Registration Messages

On the Event **Attendee Setup** page, you can customize the instructions displayed on your registration page and the confirmation email displayed in the browser after event registration is completed.

KB: [Registration Messages](#)

Instructions and Confirmation Messaging 

Event Registration Instructions

Event Confirmation Message

Thank you for registering for Golf and Learn Expo.

