

GrowthZone Event Management

Agenda

Event Communications

Manage Event Registrations (the Attendees tab)

- Adding

- Updating

- Cancelations

- Waiting List

- Table/Team Assignment

Event Invoicing and Payments (the Attendee Purchases tab)

Printing Badges

Checking in Attendees

Reporting

Event Communications

Using the communication options in an event allows you to easily communicate new events to your members, resend emails, send reminders, etc.

GZ Knowledge Base: [Event Invitations & Other Communications](#)

The screenshot displays the GrowthZone software interface for an event titled "Golf and Learn Expo September 2023". The interface is divided into two main sections. The top section shows the event overview with a navigation menu including "Overview", "Attendees", "Attendee Purchases", "Sponsors", "Exhibitors", and "Attendee Setup". A red box highlights the "Overview" tab, and a red arrow points to a three-dot menu icon in the top right corner. A dropdown menu is open, showing options: "Send Event Invite Email", "Re-Send Event Invite", "Copy This Event", "Cancel Event", and "Postpone Event". The bottom section shows the "Communication" tab, which is also highlighted with a red box. It features a search bar with "EventId: 719924" and a "LOG NOTE" button. A red arrow points to the "LOG NOTE" button. A dropdown menu is open, showing options: "Send Email", "Send Email To Attendee", "Send Event Invite Email", and "Send Email To No Shows". Below the dropdown is a table of communication logs.

Date	Subject	From	To	Type
8/21/2023 12:45 PM	Golf and Learn Expo September 2023 - attendee ...	Shelly's DB INTERNAL	Shawn Ashmore	Automated Generated Email
8/21/2023 12:43 PM	Golf and Learn Expo September 2023 - attendee ...	Shelly's DB INTERNAL	Fergus Fraser	Automated Generated Email
8/21/2023 12:24 PM	Event Invite	Jared Kincaid	85 Recipients	Event Invite

Event Communications

Notifications ×

Notifications

Search

Category

<input type="checkbox"/>	Category	Notification Type	Email Address	Frequency
<input type="checkbox"/>	Events	Event Submitted for Approval	<input type="text"/>	As It Happens
<input type="checkbox"/>	Events	Online Event Registration	<input type="text"/>	As It Happens
<input type="checkbox"/>	Events	Unregistered Attendees	<input type="text"/>	As It Happens

Notifications can be sent to event coordination staff when contacts submit events for approval, register online, and/or cancel a registration.

Managing Event Registrations

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

GZ Knowledge Base: [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 horizontal menu allows switching between tabs: Overview, Attendees, Attendee Purchases, Sponsors, Exhibitors, Attendee Setup, Sponsor Setup, Exhibitor Setup, and Sessions/Bre.

The left panel shows the "Attendees" tab with a search bar and a filter for "Attendee Status: Registered". A table lists attendees with columns for Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, and Reg. Id. The table contains several rows, including attendees from MacKenzie's and The White Council.

The right panel shows the "Attendee Purchases" tab with a search bar and an "EVENT ACTIVITY REPORT" dropdown. A table lists purchases with columns for Billing Name, Ref #, Discounts, Total, Balance, and Actions. The table shows purchases for Aaron Ashmore, Brianna MacKenzie, Harry Dresden, Jamie Fraser, and Fergus Fraser.

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' section of the GrowthZone software. The page title is 'Golf and Learn Expo September 2023'. The navigation bar includes 'Overview', 'Attendees', 'Attendee Purchases', 'Sponsors', 'Exhibitors', 'Attendee Setup', 'Sponsor Setup', 'Exhibitor Setup', and 'Sessions/Bre'. A search bar is present with a filter for 'Attendee Status: Registered, Attended'. Below the search bar is a table of registrations with columns: Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, Registration Type, Table/Team Name, Additional Items, Match, and Actions. A red arrow points to the 'Actions' column for the first row (Brianna MacKenzie, Attended, Ref # 634). A red box highlights the 'Update Registration' and 'Edit Attendee' options in the dropdown menu.

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		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		
9405547	Reserved Attendee 3	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	0		
9405547	Reserved Attendee 2	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	0		
9405547	Harry	Dresden	The White Council	Registered	641	Team of 4	Gray Team	2		
9405547	Reserved Attendee 4	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	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.

GZ Knowledge Base: [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 Count. A red box highlights the 'More' menu icon for the first row, 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 for the first row, which is open to show options: 'Cancel Registration', 'Update Registration', 'Edit Attendee', 'View Sessions', 'Enter Check', 'Enter Credit Card', and 'Create Write Off'. A red arrow points 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	Count
9446377	Jamie	Fraser	Registered	642 x	Single Attendee (Afternoon...	Mackenzie/Fraser Team	2
9524587	William	Wizard	Registered	648 ✓	Single Attendee (Afternoon...	Team of 4	1
9524629	Jack	Reacher	Attended	649 ✓	Single Attendee (Afternoon...	Team of 4	0
9635360	Alicia	Snow	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	0
9635360	Cally	Cupcakes	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	0
9635815	Robert	Smith	Registered	659 ✓	New Single Regtype		0

Name	Registration Status	Invoice ID	Registration Type	Team	Count		
The White Council	Registered	641 x	Team of 4	Gray Team	2		
The White Council	Registered	641 x	Team of 4	Gray Team	0		
Wizard's Supply Co	Registered	642 x	Single Attendee (Afternoon...	MacKenzie/Fraser Team	2		
Wizard's Supply Co	Registered	648 ✓	Single Attendee (Afternoon...	Team of 4	1		
9524629	Jack	Reacher	Attended	649 ✓	Single Attendee (Afternoon...	Team of 4	0
9635360	Alicia	Snow	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	0
9635360	Cally	Cupcakes	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	0
9635815	Robert	Smith	Registered	659 ✓	New Single Regtype		0

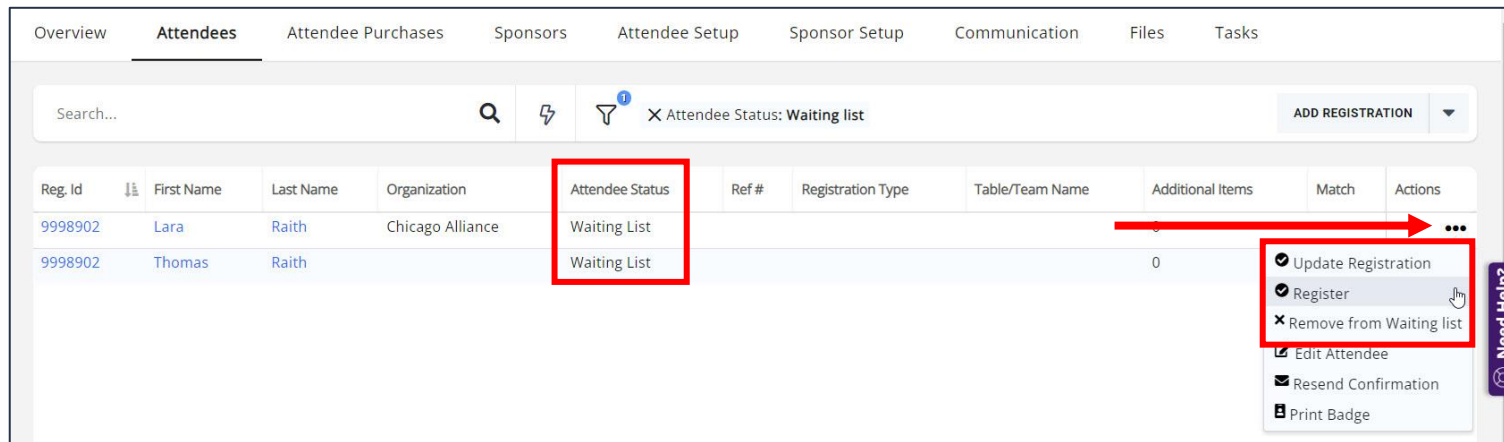
Paid Invoice

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.

GZ Knowledge Base: [Managing the Waiting List](#)



The screenshot displays the 'Attendees' tab in a software interface. At the top, there are navigation tabs: Overview, Attendees (selected), Attendee Purchases, Sponsors, Attendee Setup, Sponsor Setup, Communication, Files, and Tasks. Below the tabs is a search bar and a filter icon. A filter is applied: 'Attendee Status: Waiting list'. An 'ADD REGISTRATION' button is visible on the right. The main area contains a table with the following columns: Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, Registration Type, Table/Team Name, Additional Items, Match, and Actions. Two rows are shown, both with 'Waiting List' in the Attendee Status column. A red box highlights the 'Attendee Status' column header and the 'Waiting List' entries. A red arrow points from the 'Waiting List' entry in the first row to an action menu. The action menu is open, showing options: Update Registration, Register, Remove from Waiting list, Edit Attendee, Resend Confirmation, and Print Badge. A 'Need Help?' button is located at the bottom right of the interface.

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						...
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

GZ Knowledge Base: [Table/Team Management](#)

Table/Team Management

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

[ADD A TABLE/TEAM](#) [REQUEST RESERVED ATTENDEE NAMES](#)

Unassigned Attendees		
Attendee Name	Company Name	RegId
Robert Smith	New Single Regtype	9635815
Babydog Wizard	Wizard's Supply Co- Deerwood	9680401
Alexander Wizard	Wizards	9680401
Shelly Wizard	Cami's Jammies	9680401
William Wizard	Wizard's Supply Co	9680401

Tables / Teams		
Gray Team (Team of 4) 4 of 4		
Harry Dresden	The White Council	9405547
Reserved Attendee 2	The White Council	9405547
Reserved Attendee 3	The White Council	9405547
Reserved Attendee 4	The White Council	9405547
MacKenzie/Fraser Team (Team of 4) 3 of 4		
Jamie Fraser	Single Attendee (Afternoon Golf)	9446377
Brianna MacKenzie	MacKenzies	9269582
Roger MacKenzie	MacKenzies	9269582
New Table/Team (Team of 4) 4 of 4		
Jack Wizard	Wizards	9680401
Karrin Murphy	Chicago Alliance	9866582

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.

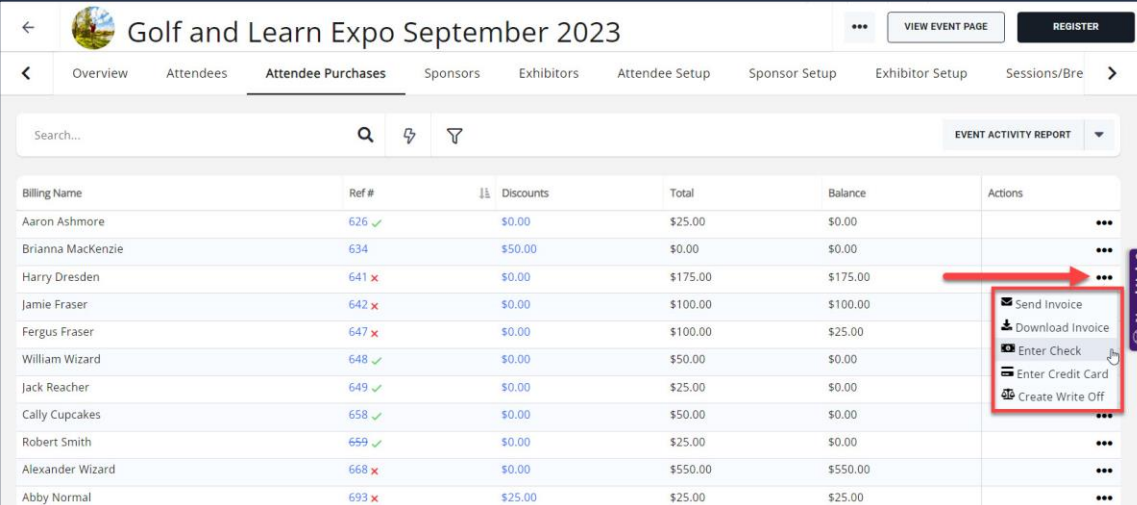
GZ Knowledge Base: [Matching Registrants to Contacts](#)

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		...

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.

GZ Knowledge Base: [Accept Payments](#)



Golf and Learn Expo September 2023

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

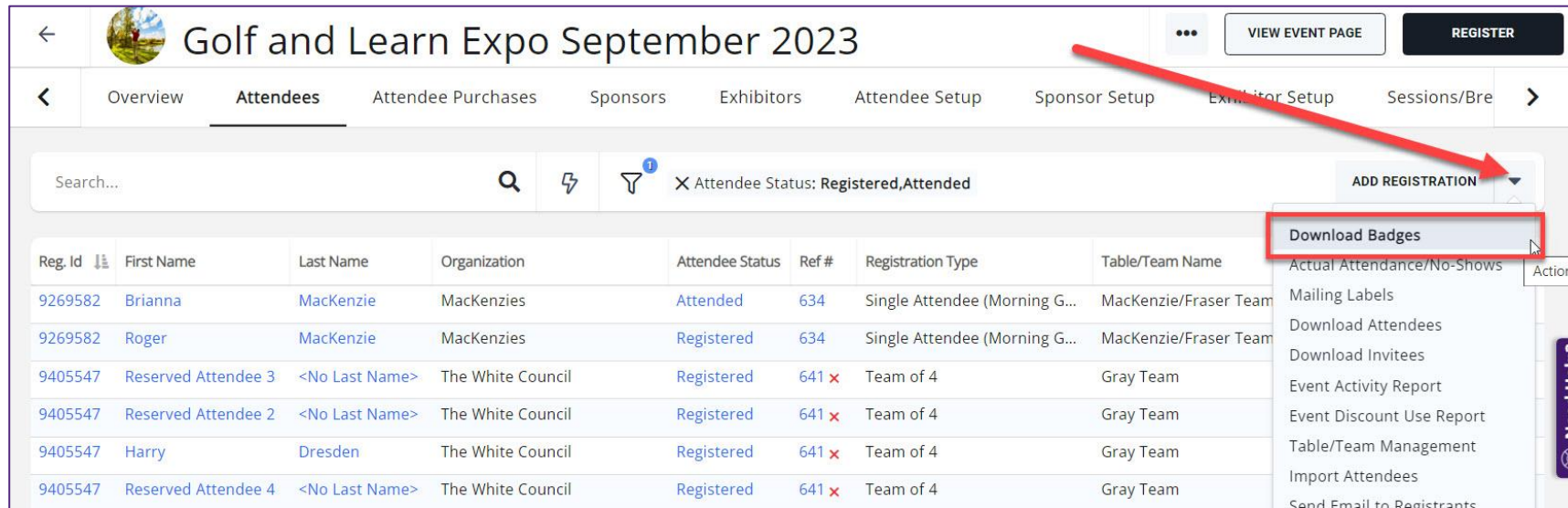
Search... EVENT ACTIVITY REPORT

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	...
William Wizard	648 ✓	\$0.00	\$50.00	\$0.00	...
Jack Reacher	649 ✓	\$0.00	\$25.00	\$0.00	...
Cally Cupcakes	658 ✓	\$0.00	\$50.00	\$0.00	...
Robert Smith	659 ✓	\$0.00	\$25.00	\$0.00	...
Alexander Wizard	668 ✗	\$0.00	\$550.00	\$550.00	...
Abby Normal	693 ✗	\$25.00	\$25.00	\$25.00	...

Printing Badges

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

GZ Knowledge Base: [Download Name Badges](#)



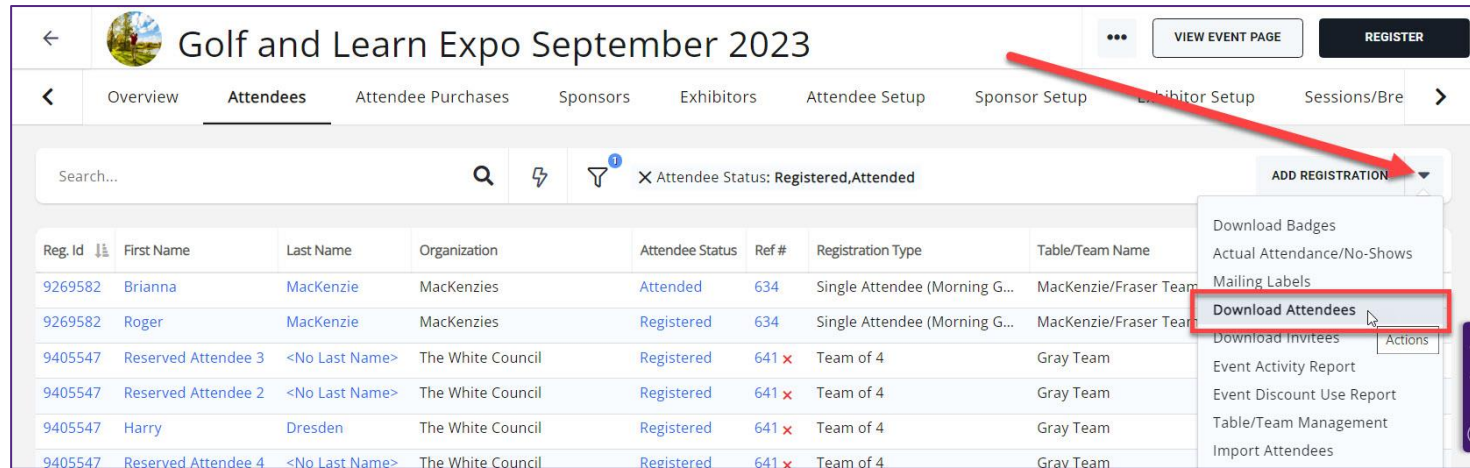
The screenshot displays the 'Attendees' management interface. At the top, there's a navigation bar with a back arrow, a profile picture, the event name 'Golf and Learn Expo September 2023', and buttons for 'VIEW EVENT PAGE' and 'REGISTER'. Below this is a secondary navigation bar with tabs for 'Overview', 'Attendees', 'Attendee Purchases', 'Sponsors', 'Exhibitors', 'Attendee Setup', 'Sponsor Setup', 'Exhibitor Setup', and 'Sessions/Bre'. A search bar and filter options are present, including a filter for 'Attendee Status: Registered, Attended'. The main area contains a table of attendees with columns for Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, Registration Type, and Table/Team Name. A red arrow points to the 'Download Badges' option in the 'Actions' dropdown menu for the first attendee.

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name	Actions
9269582	Brianna	MacKenzie	MacKenzies	Attended	634	Single Attendee (Morning G...	MacKenzie/Fraser Team	Download Badges Actual Attendance/No-Shows Mailing Labels Download Attendees Download Invitees Event Activity Report Event Discount Use Report Table/Team Management Import Attendees Send Email to Registrants
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	Team of 4	Gray Team	
9405547	Reserved Attendee 2	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	
9405547	Harry	Dresden	The White Council	Registered	641	Team of 4	Gray Team	
9405547	Reserved Attendee 4	<No Last Name>	The White Council	Registered	641	Team of 4	Gray Team	

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 shows the 'Attendees' tab for the 'Golf and Learn Expo September 2023'. The table lists attendees with columns for Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, Registration Type, and Table/Team Name. A red arrow points to the 'Actions' button in the top right corner of the table. A dropdown menu is open, showing the 'Download Attendees' option highlighted with a red box.

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

GZ Knowledge Base: [Check-in Roster](#)

Checking in Attendees

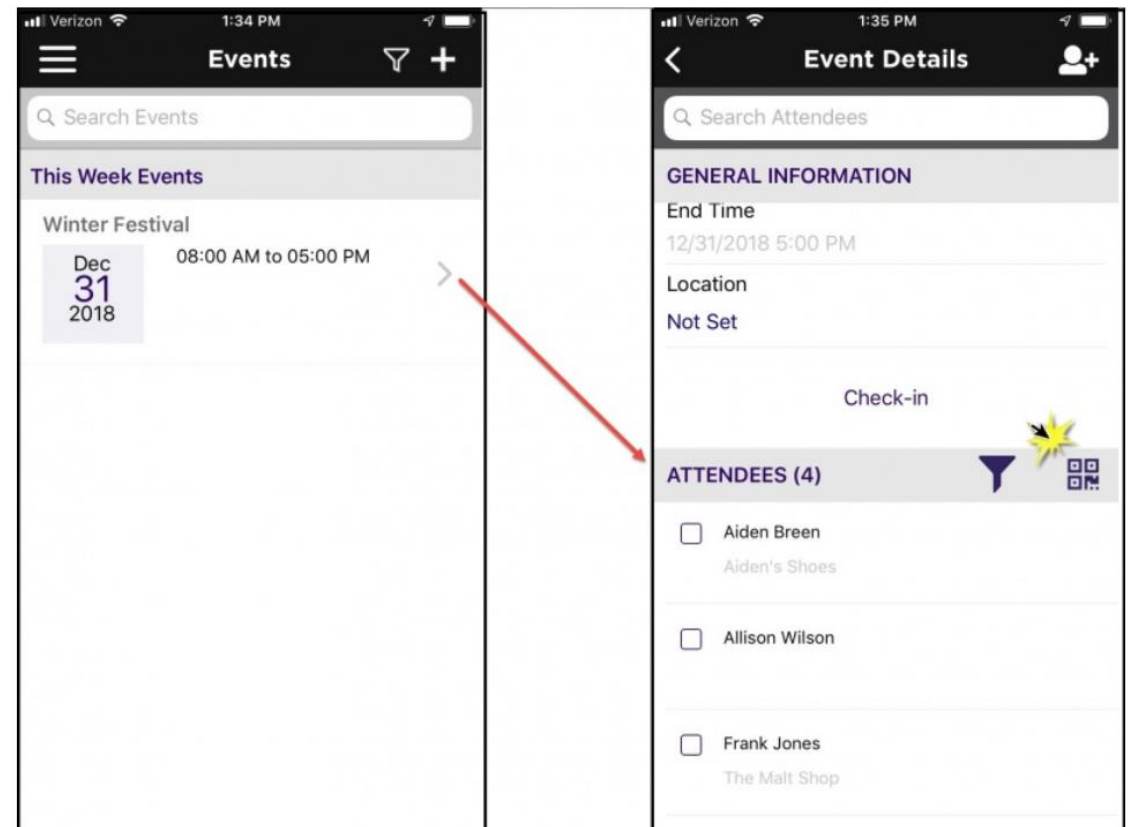
You may check-in your attendees in several ways:

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

Checking in Attendees

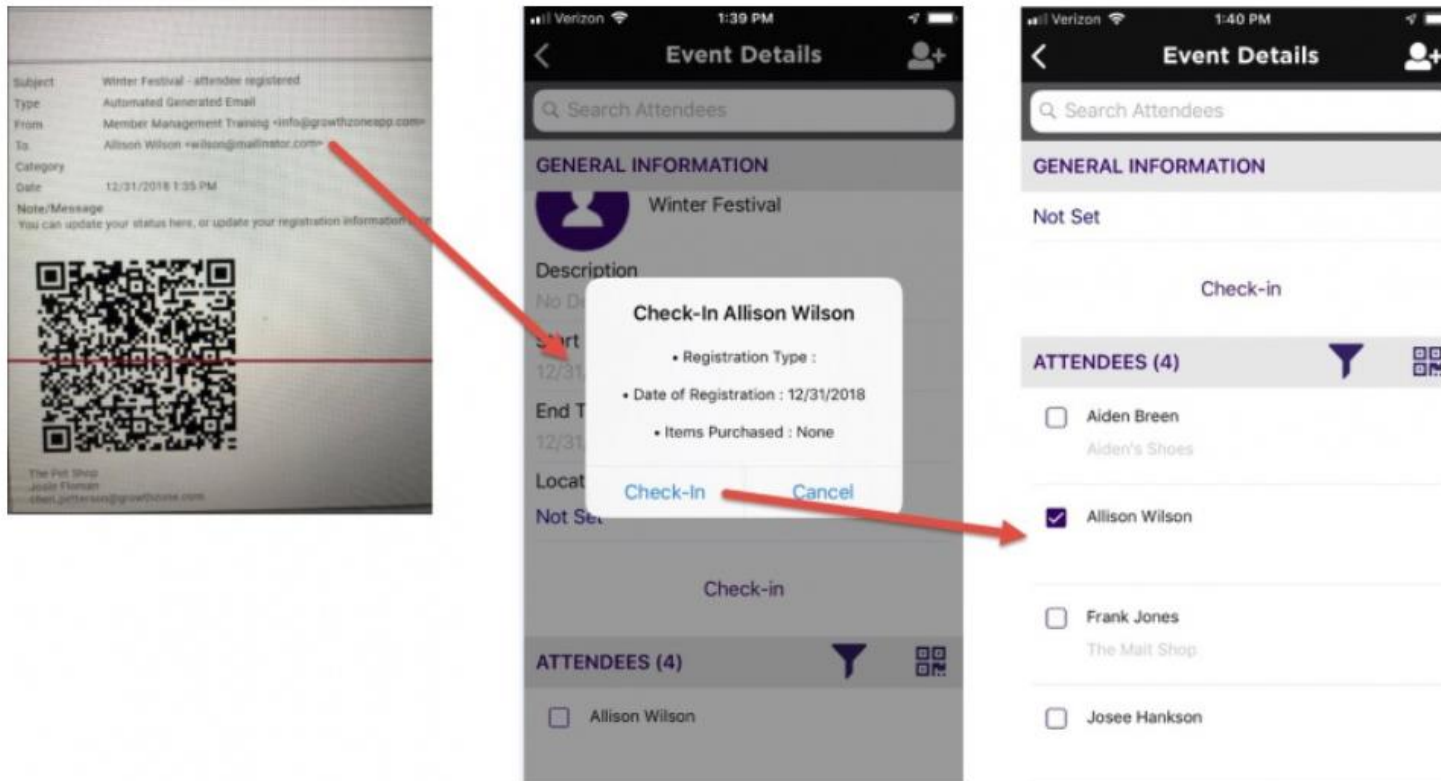
Using the Staff App to Check-in
Event Attendees

GZ Knowledge Base: [Using the Staff App](#)



Checking in Attendees

Using the Staff App to Check-in Event Attendees



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)

GZ Knowledge Base: [Event Reporting](#)

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »