GrowthZone Event Management

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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

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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

Event Communications

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

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

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

Paid Invoice

Unpaid Invoice

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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

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

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.

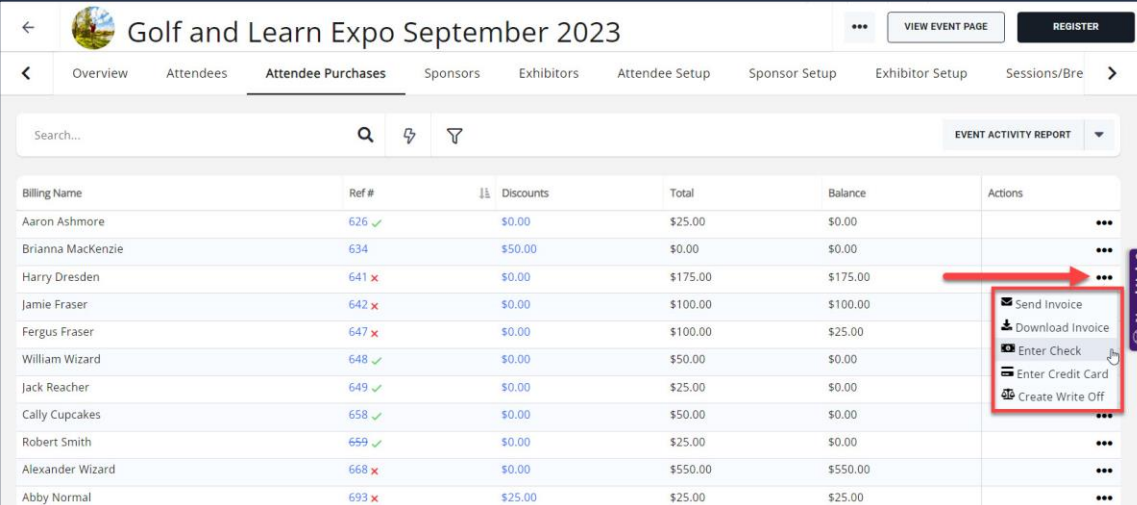GZ Knowledge Base: Matching Registrants to Contacts

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: <u>Accept Payments</u>

Printing Badges

You can easily download badges for your event, and a variety of Avery Style templates are available
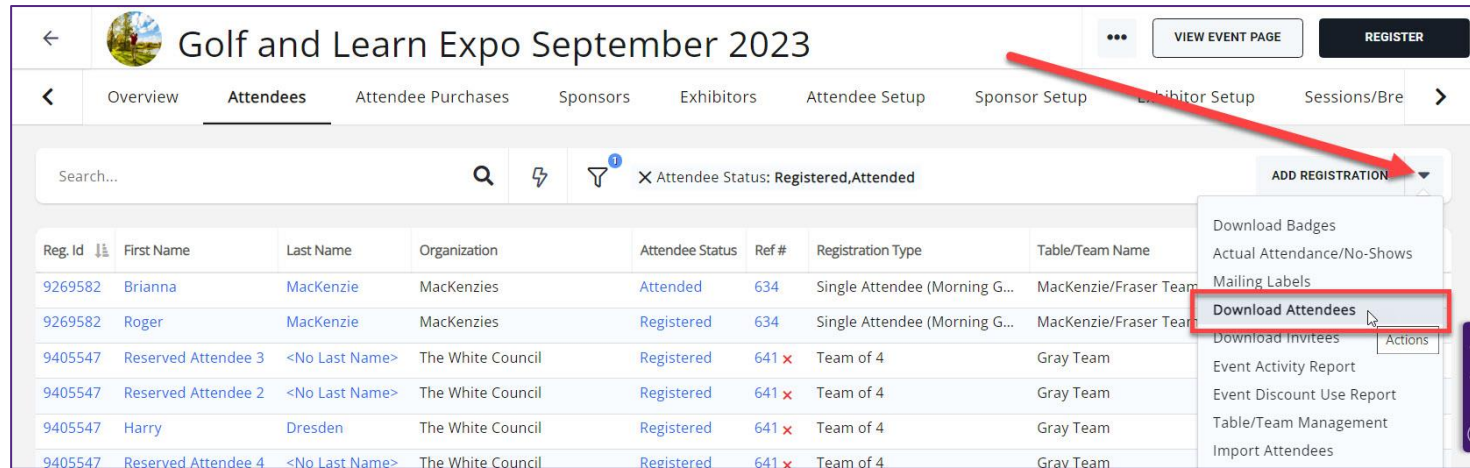
GZ Knowledge Base: Download Name Badges

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

GZ Knowledge Base: Check-in Roster

Checking in Attendees
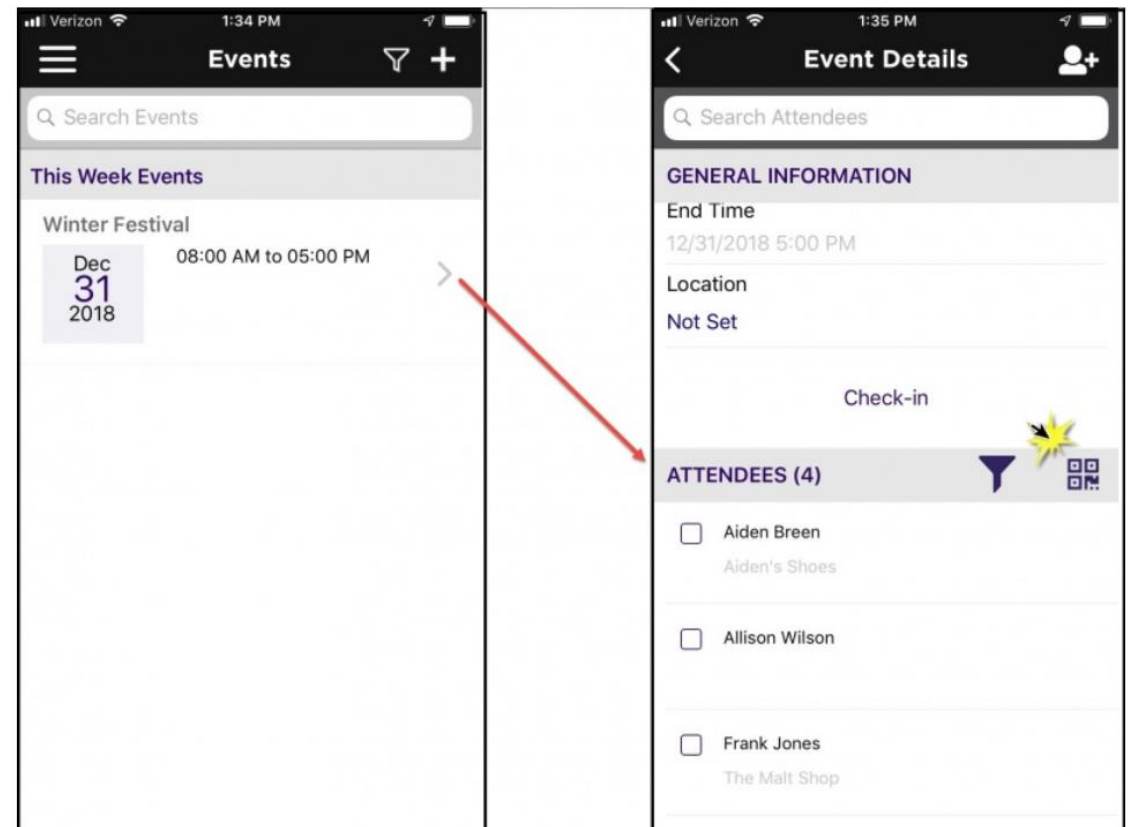
You may check-in your attendees in several ways:

- 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
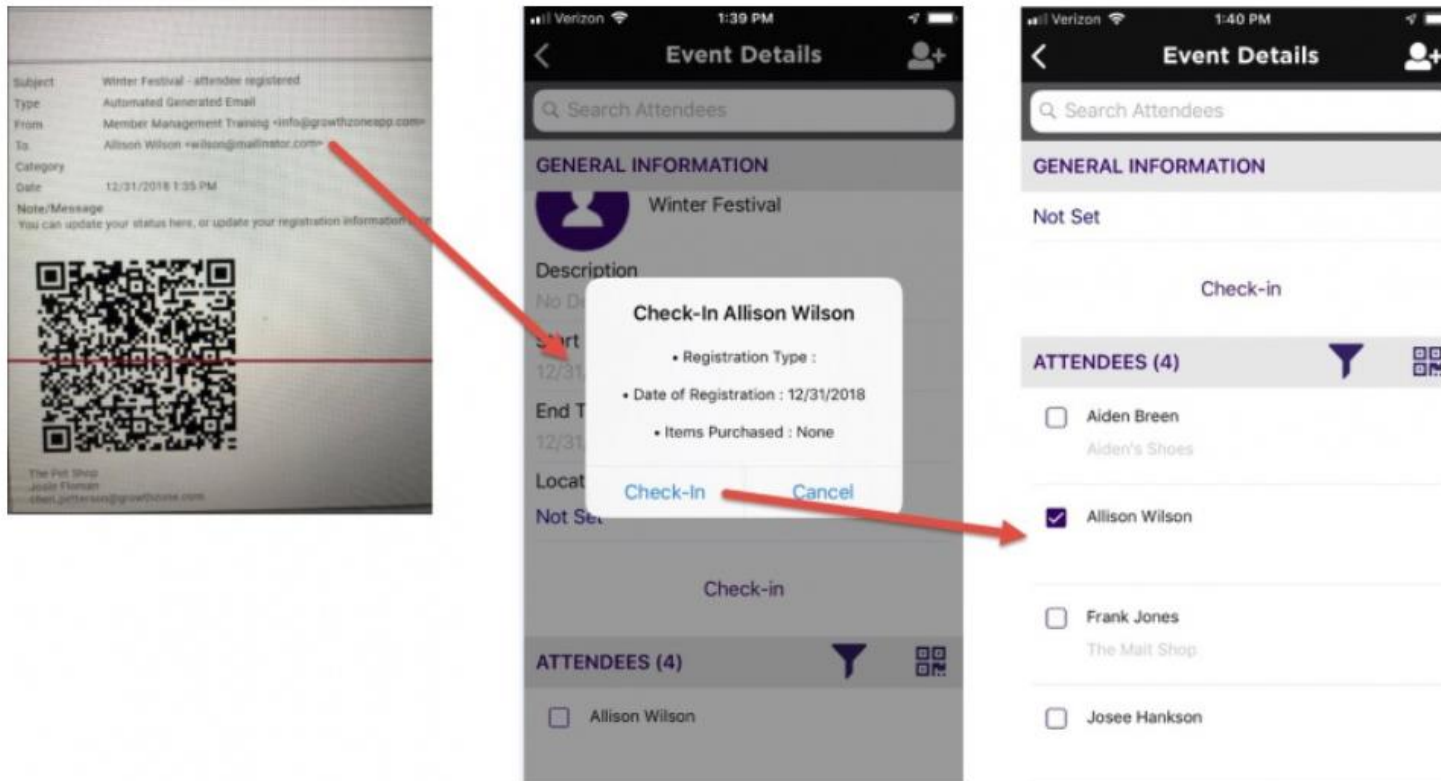
Event Reports

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) »