

GrowthZone - Managing Your Events



Agenda

Send Event Invites and Other Communications

Manage Event Registrations

- Updates

- Cancelations

- Waiting List

- Table/Team Assignment

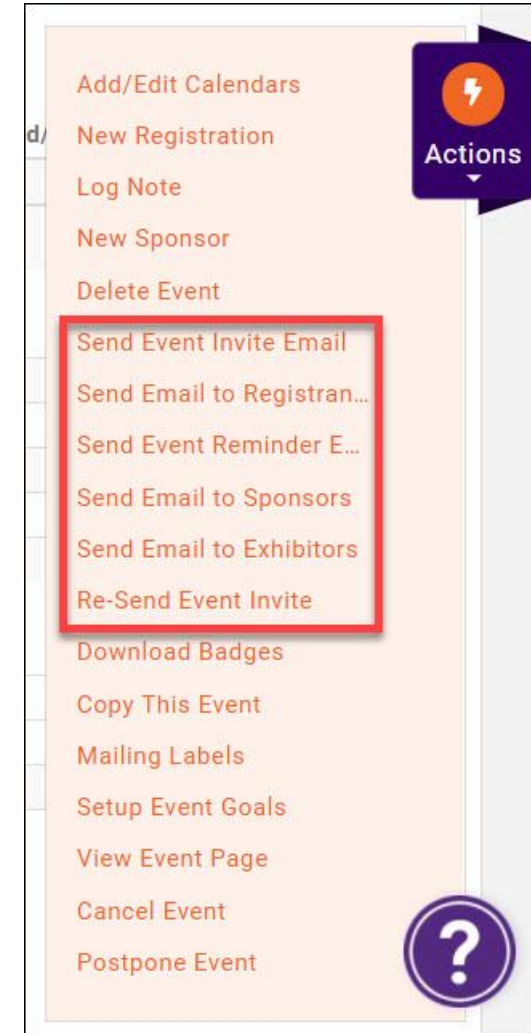
Manage Event Invoicing

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.

GZ Knowledge Base:

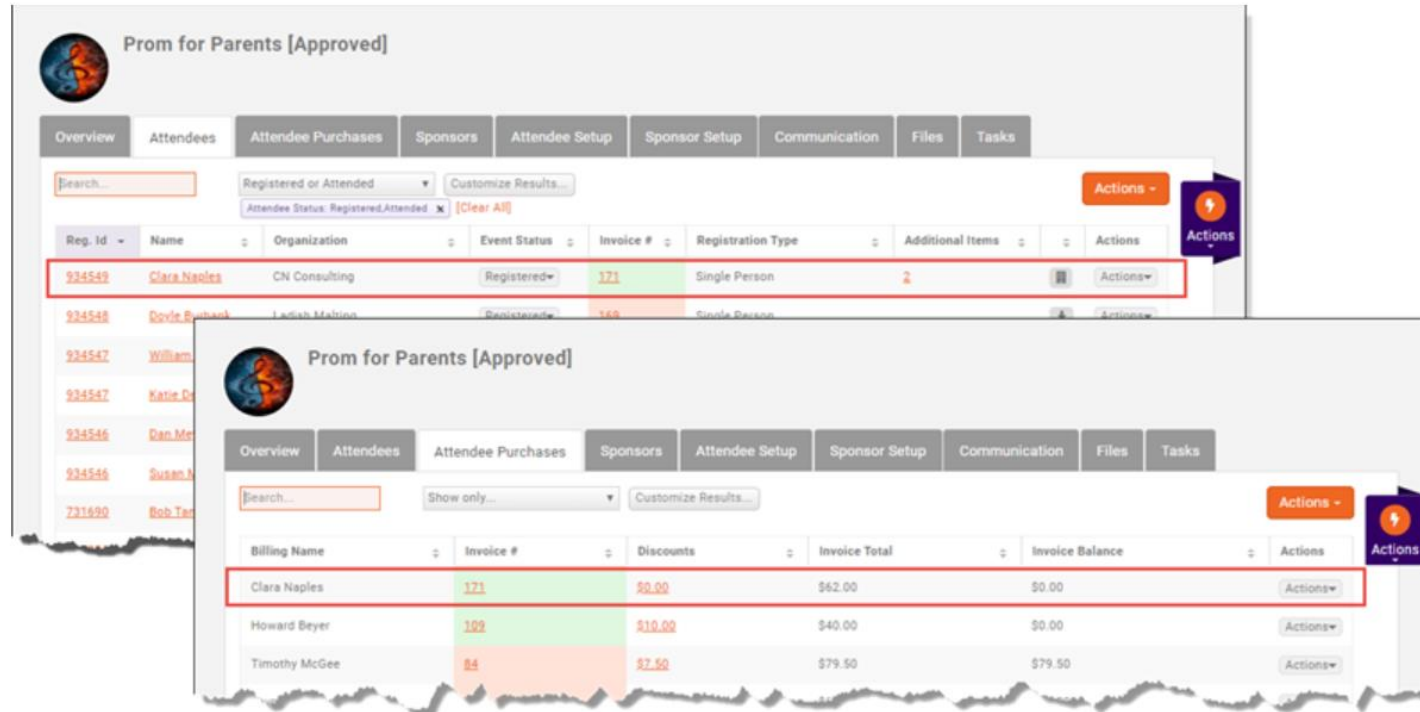
[Event Invitations & Other Communications](#)



Managing Registrations/Attendees

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

GZ Knowledge Base: [Working with Event Registrations](#)



Prom for Parents [Approved]

Overview Attendees Attendee Purchases Sponsors Attendee Setup Sponsor Setup Communication Files Tasks

Registered or Attended Customize Results...
Attendee Status: Registered, Attended [Clear All]

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
934549	Clara Naples	CN Consulting	Registered	171	Single Person	2	Actions
934548	David Beyer	Ladish Mabine	Registered	169	Single Person		Actions
934547	William						
934547	Katie D						
934546	Dan M						
934546	Susan M						
731690	Bob T						

Prom for Parents [Approved]

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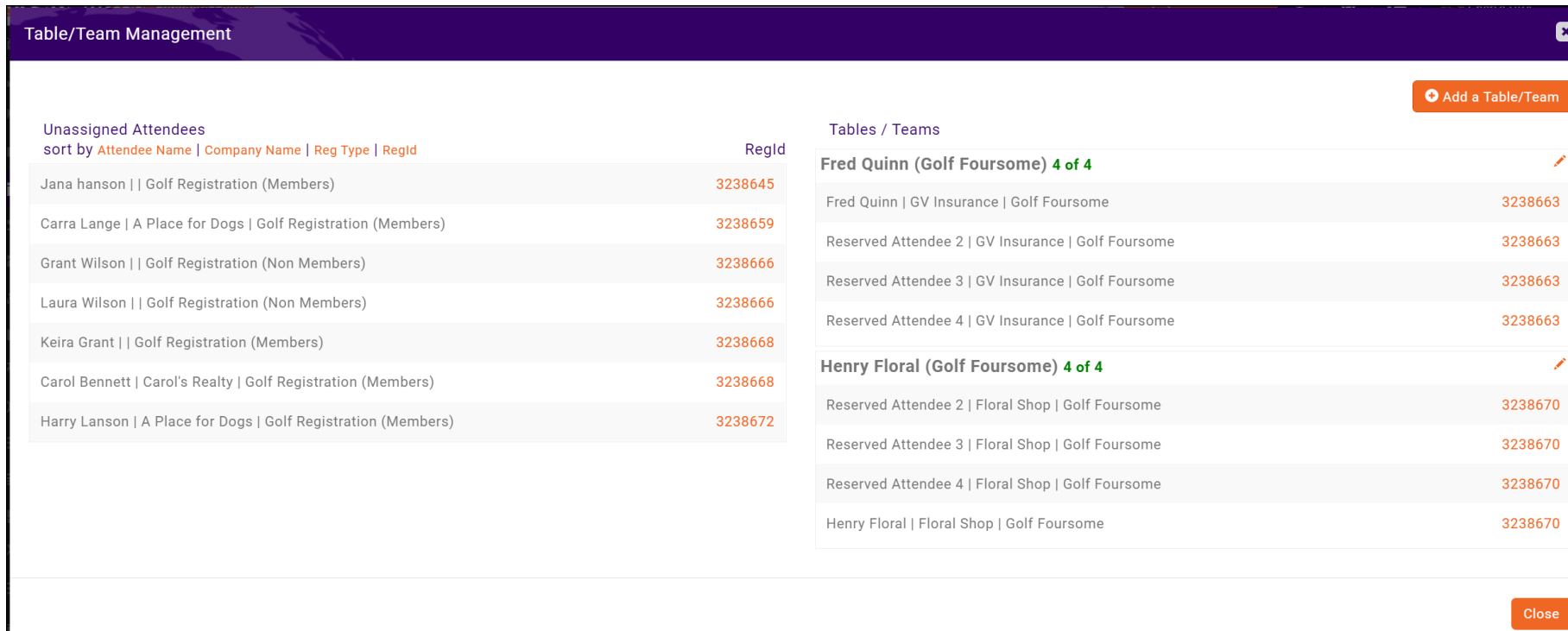
Show only... Customize Results...

Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Clara Naples	171	\$0.00	\$62.00	\$0.00	Actions
Howard Beyer	109	\$10.00	\$40.00	\$0.00	Actions
Timothy McGee	84	\$7.50	\$79.50	\$79.50	Actions

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](#)



The screenshot shows a web interface for managing tables and teams. It features two main panels: 'Unassigned Attendees' on the left and 'Tables / Teams' on the right. The 'Unassigned Attendees' panel lists individuals with their names, company names, registration types, and unique RegId numbers. The 'Tables / Teams' panel shows two groups: 'Fred Quinn (Golf Foursome) 4 of 4' and 'Henry Floral (Golf Foursome) 4 of 4', each with a list of attendees and their RegId numbers. A 'Close' button is located at the bottom right of the interface.

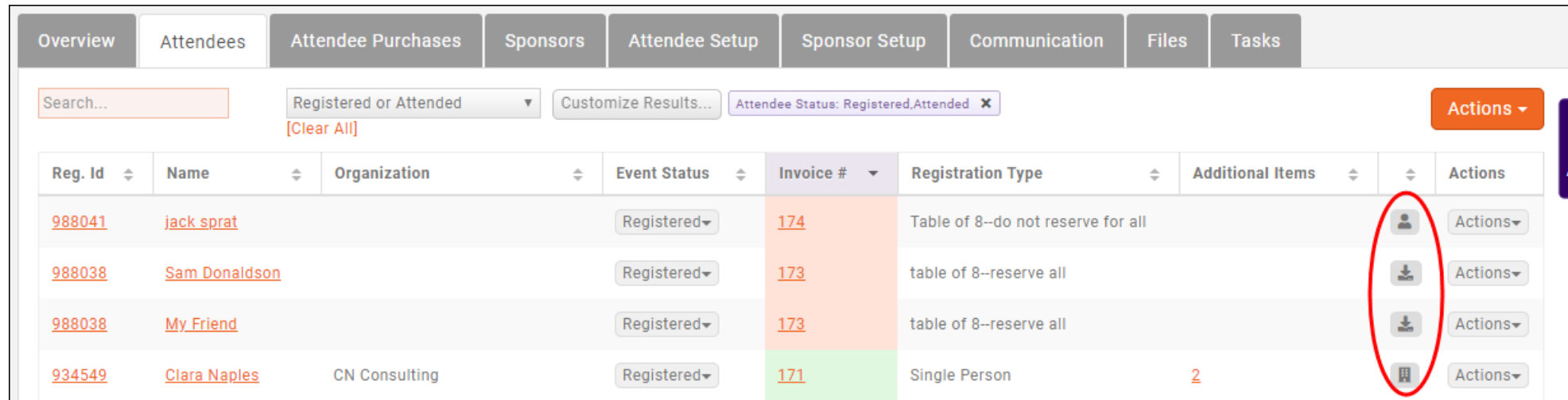
Unassigned Attendees	
Attendee Name Company Name Reg Type	RegId
Jana hanson Golf Registration (Members)	3238645
Carra Lange A Place for Dogs Golf Registration (Members)	3238659
Grant Wilson Golf Registration (Non Members)	3238666
Laura Wilson Golf Registration (Non Members)	3238666
Keira Grant Golf Registration (Members)	3238668
Carol Bennett Carol's Realty Golf Registration (Members)	3238668
Harry Lanson A Place for Dogs Golf Registration (Members)	3238672

Tables / Teams	
Fred Quinn (Golf Foursome) 4 of 4	
Fred Quinn GV Insurance Golf Foursome	3238663
Reserved Attendee 2 GV Insurance Golf Foursome	3238663
Reserved Attendee 3 GV Insurance Golf Foursome	3238663
Reserved Attendee 4 GV Insurance Golf Foursome	3238663
Henry Floral (Golf Foursome) 4 of 4	
Reserved Attendee 2 Floral Shop Golf Foursome	3238670
Reserved Attendee 3 Floral Shop Golf Foursome	3238670
Reserved Attendee 4 Floral Shop Golf Foursome	3238670
Henry Floral Floral Shop Golf Foursome	3238670

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](#)



Overview Attendees Attendee Purchases Sponsors Attendee Setup Sponsor Setup Communication Files Tasks

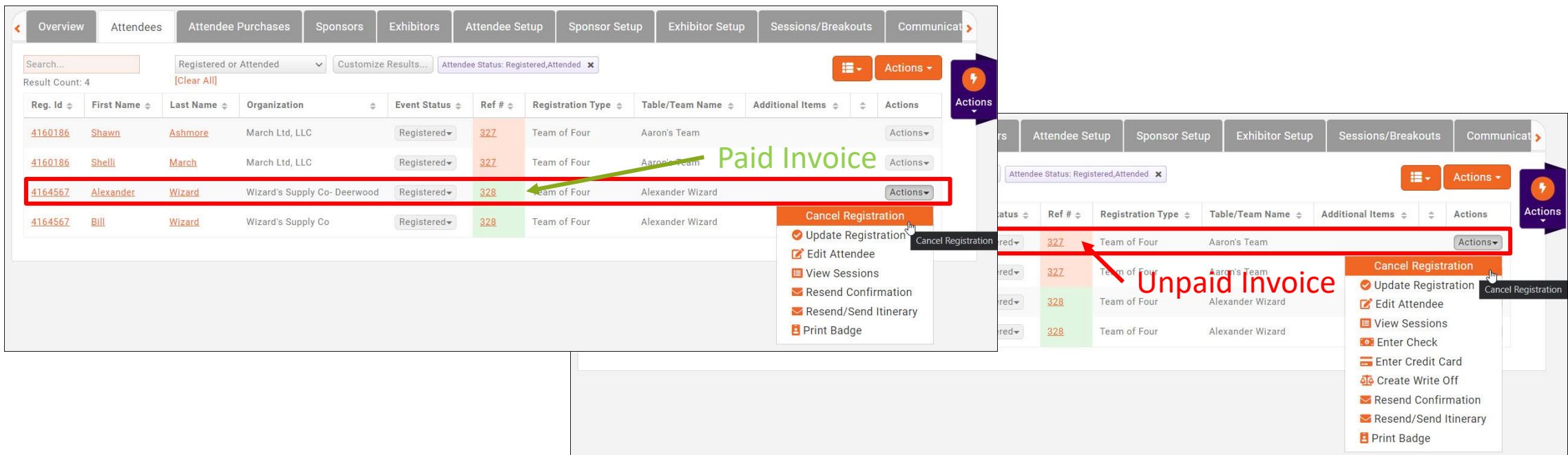
Search... Registered or Attended [Clear All] Customize Results... Attendee Status: Registered, Attended X Actions

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items		Actions
988041	jack sprat		Registered	174	Table of 8--do not reserve for all			Actions
988038	Sam Donaldson		Registered	173	table of 8--reserve all			Actions
988038	My Friend		Registered	173	table of 8--reserve all			Actions
934549	Clara Naples	CN Consulting	Registered	171	Single Person	2		Actions

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.

GZ Knowledge Base: [Cancel an Event Registration](#)



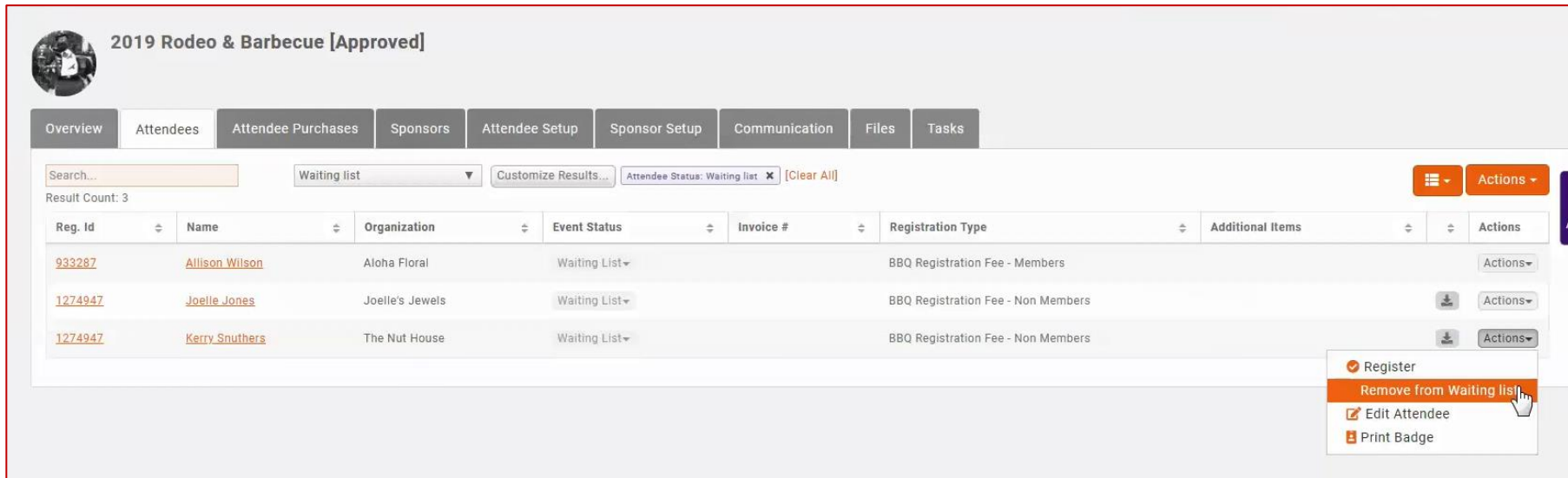
The screenshot displays the 'Attendees' tab in the GrowthZone software. It features a table of attendees with columns for Reg. Id, First Name, Last Name, Organization, Event Status, Ref #, Registration Type, Table/Team Name, and Actions. Two attendees are highlighted: one with a 'Paid Invoice' (Ref # 327) and one with an 'Unpaid Invoice' (Ref # 328). The 'Unpaid Invoice' row is circled in red, and its 'Actions' dropdown menu is open, showing options like 'Cancel Registration', 'Update Registration', 'Edit Attendee', 'View Sessions', 'Resend Confirmation', 'Resend/Send Itinerary', and 'Print Badge'. A red arrow points from the 'Unpaid Invoice' text to the 'Cancel Registration' option in the dropdown menu.

Reg. Id	First Name	Last Name	Organization	Event Status	Ref #	Registration Type	Table/Team Name	Additional Items	Actions
4160186	Shawn	Ashmore	March Ltd, LLC	Registered	327	Team of Four	Aaron's Team		Actions
4160186	Shelli	March	March Ltd, LLC	Registered	327	Team of Four	Aaron's Team		Actions
4164567	Alexander	Wizard	Wizard's Supply Co- Deerwood	Registered	328	Team of Four	Alexander Wizard		Actions
4164567	Bill	Wizard	Wizard's Supply Co	Registered	328	Team of Four	Alexander Wizard		Actions

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](#)



2019 Rodeo & Barbecue [Approved]

Overview Attendees Attendee Purchases Sponsors Attendee Setup Sponsor Setup Communication Files Tasks

Search... Waiting list Customize Results... Attendee Status: Waiting list [Clear All]

Result Count: 3

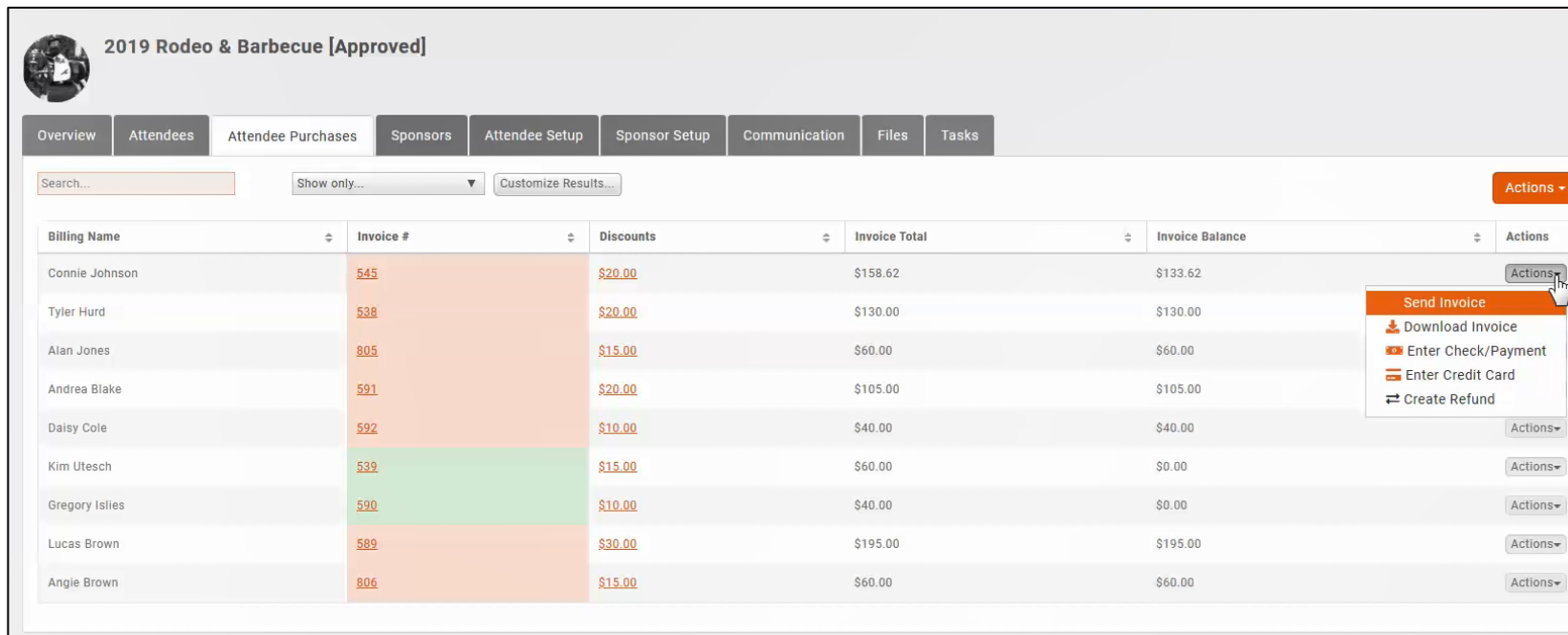
Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
933287	Allison Wilson	Aloha Floral	Waiting List		BBQ Registration Fee - Members		Actions
1274947	Joelle Jones	Joelle's Jewels	Waiting List		BBQ Registration Fee - Non Members		Actions
1274947	Kerry Snuthers	The Nut House	Waiting List		BBQ Registration Fee - Non Members		Actions

- Register
- Remove from Waiting list
- Edit Attendee
- Print Badge

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](#)



2019 Rodeo & Barbecue [Approved]

Overview Attendees **Attendee Purchases** Sponsors Attendee Setup Sponsor Setup Communication Files Tasks

Search... Show only... Customize Results... Actions

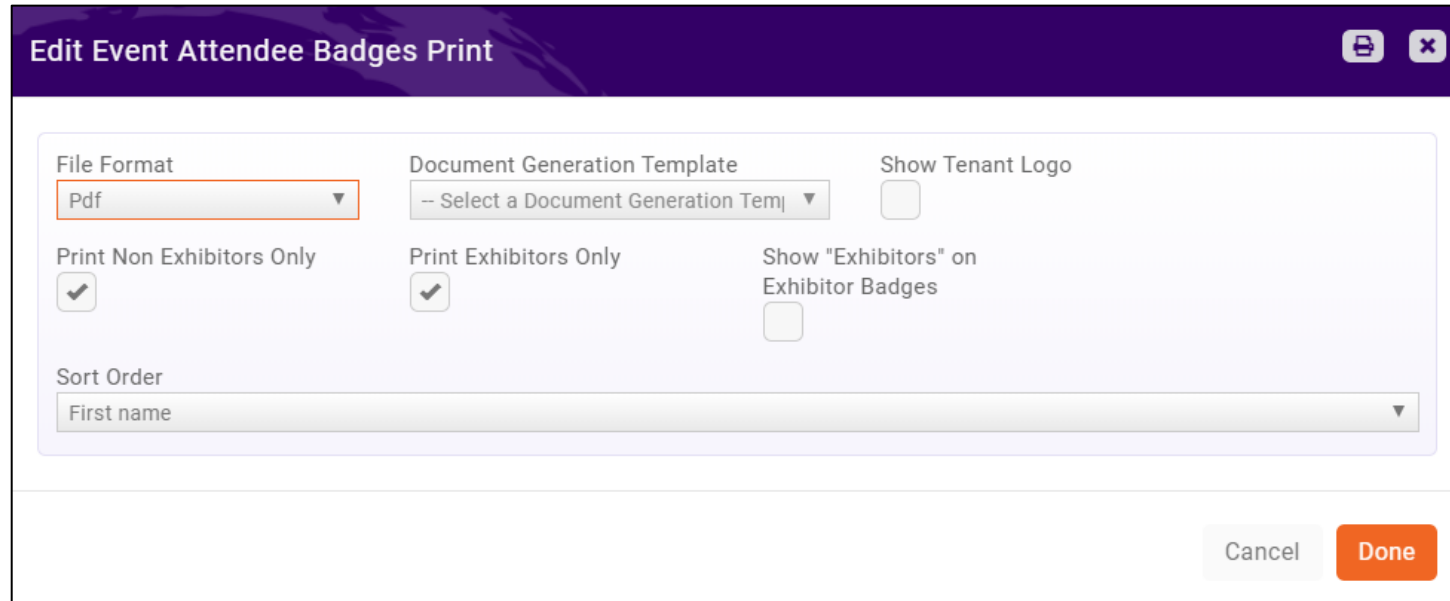
Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Connie Johnson	545	\$20.00	\$158.62	\$133.62	Actions
Tyler Hurd	538	\$20.00	\$130.00	\$130.00	Actions
Alan Jones	805	\$15.00	\$60.00	\$60.00	Actions
Andrea Blake	591	\$20.00	\$105.00	\$105.00	Actions
Daisy Cole	592	\$10.00	\$40.00	\$40.00	Actions
Kim Utesch	539	\$15.00	\$60.00	\$0.00	Actions
Gregory Islies	590	\$10.00	\$40.00	\$0.00	Actions
Lucas Brown	589	\$30.00	\$195.00	\$195.00	Actions
Angie Brown	806	\$15.00	\$60.00	\$60.00	Actions

Send Invoice
Download Invoice
Enter Check/Payment
Enter Credit Card
Create Refund

Download 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 shows a dialog box titled "Edit Event Attendee Badges Print" with a dark purple header. The dialog contains several configuration options:

- File Format:** A dropdown menu currently set to "Pdf".
- Document Generation Template:** A dropdown menu with the text "-- Select a Document Generation Tem|".
- Show Tenant Logo:** An unchecked checkbox.
- Print Non Exhibitors Only:** A checked checkbox.
- Print Exhibitors Only:** A checked checkbox.
- Show "Exhibitors" on Exhibitor Badges:** An unchecked checkbox.
- Sort Order:** A dropdown menu currently set to "First name".

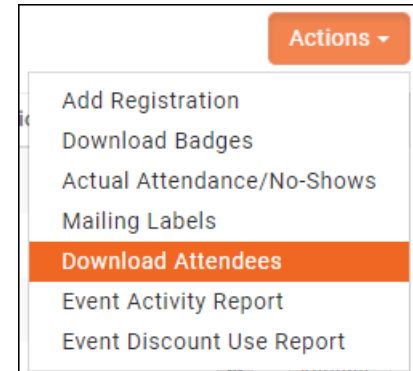
At the bottom right of the dialog, there are two buttons: "Cancel" (light gray) and "Done" (orange).

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

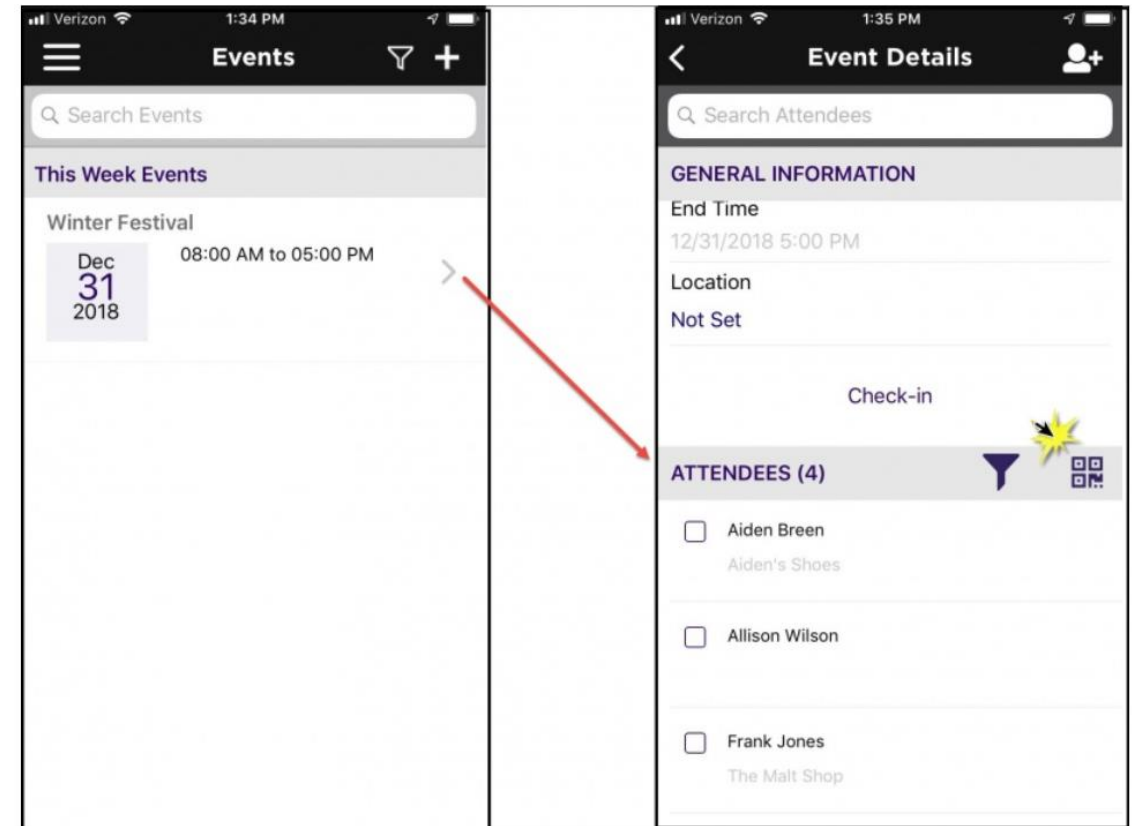
You may check-in your attendees in several ways:

- 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

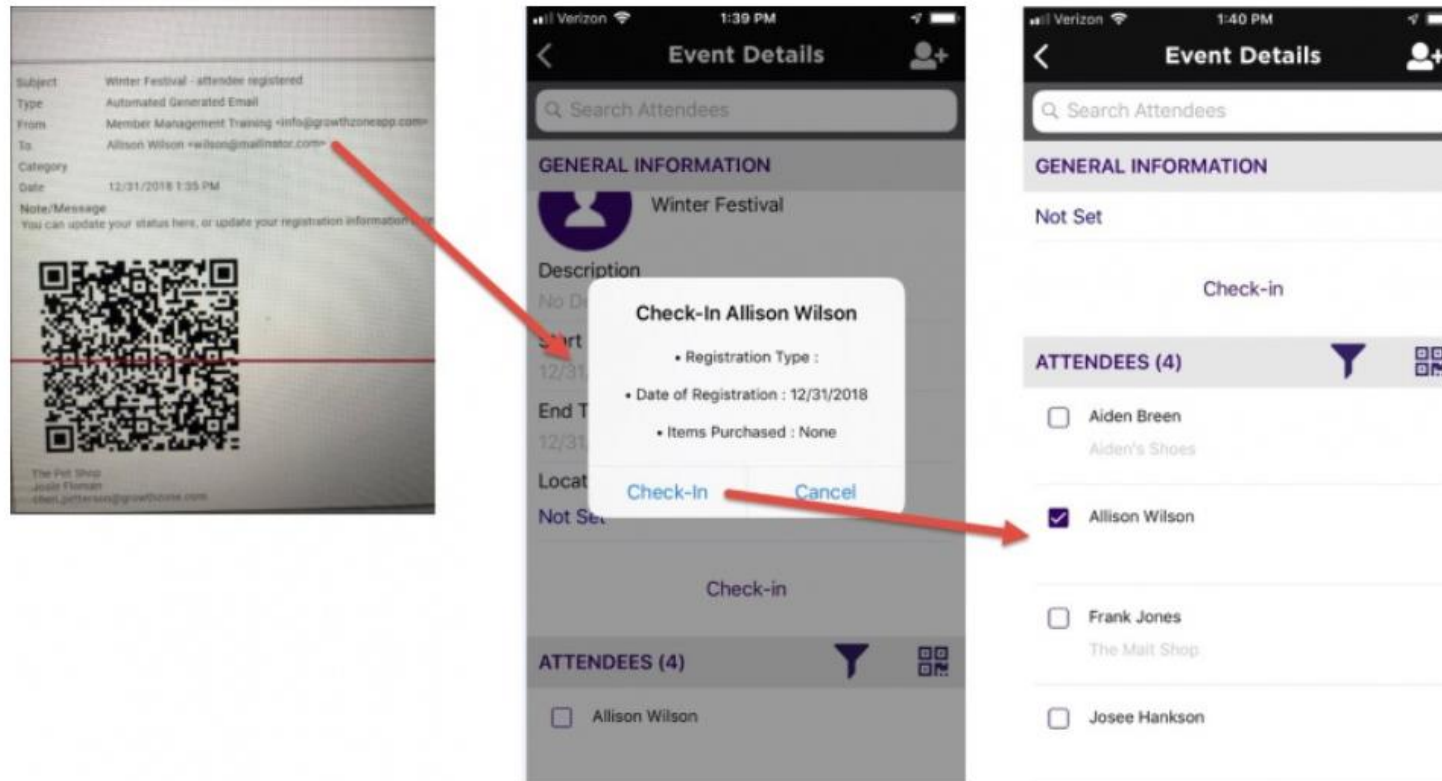
Using the Staff App to Check-in Event Attendees

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



Checking in Attendees

Using the Staff App to Check-in Event Attendees



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?



Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Documentation:

[GrowthZone Knowledge Base»](#)

Training Calendar:

[View Training Event Calendar »](#)

Live Chat:

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