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.
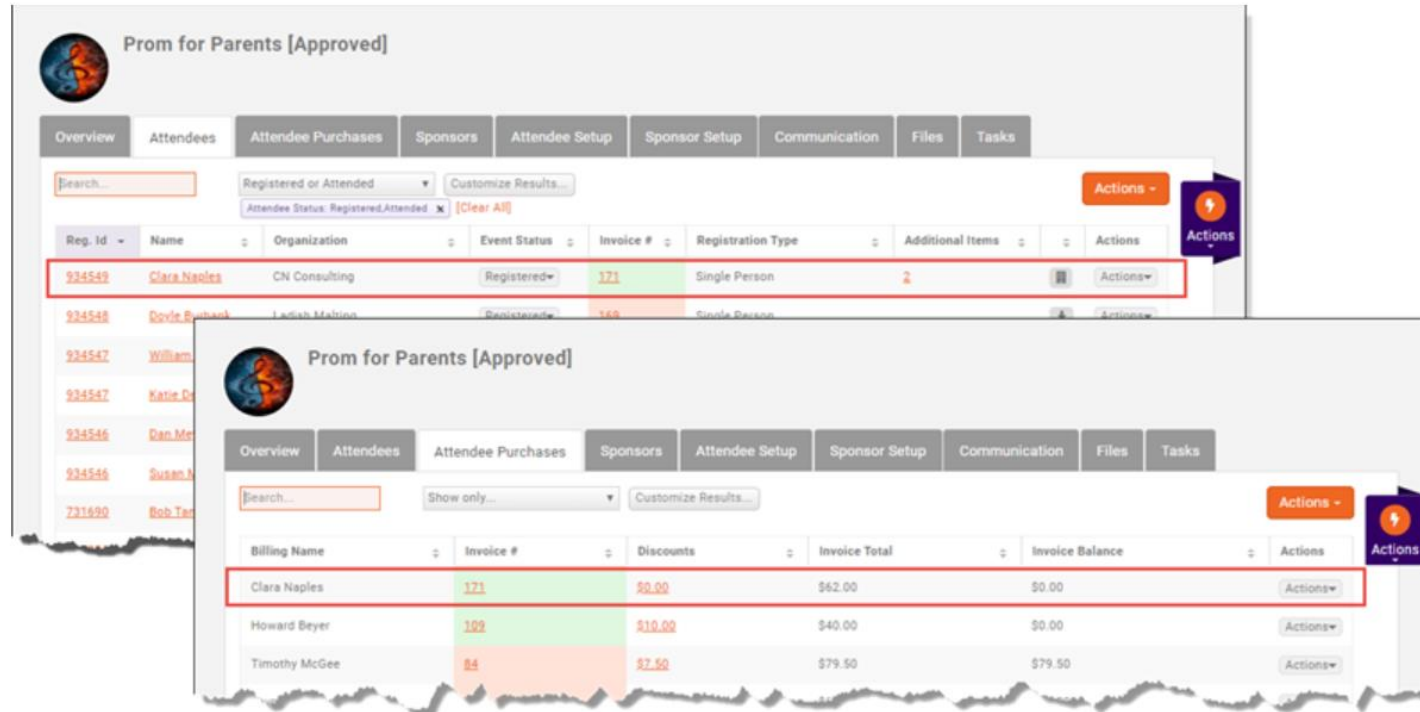
GZ Knowledge Base:

Event Invitations & Other Communications
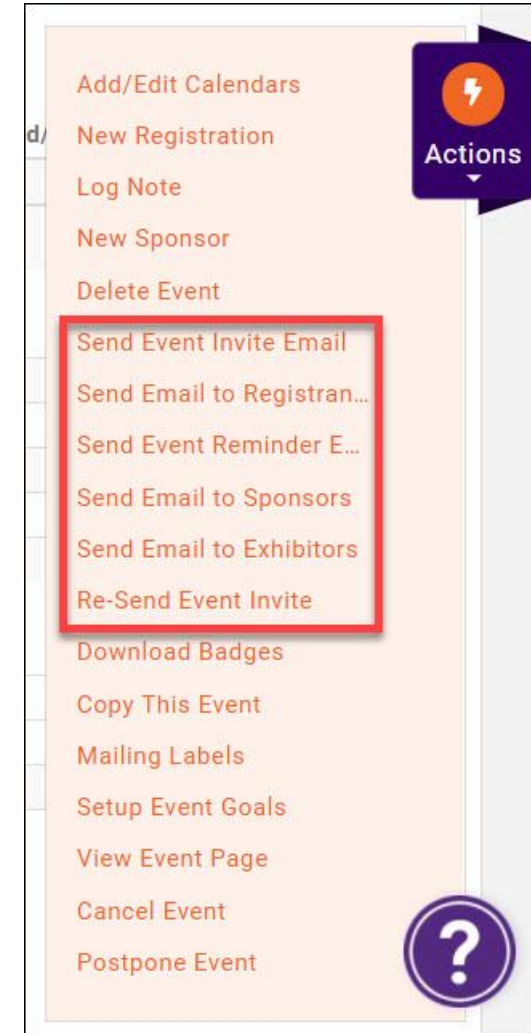
Managing Registrations/Attendees

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

GZ Knowledge Base: Working with Event Registrations

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

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
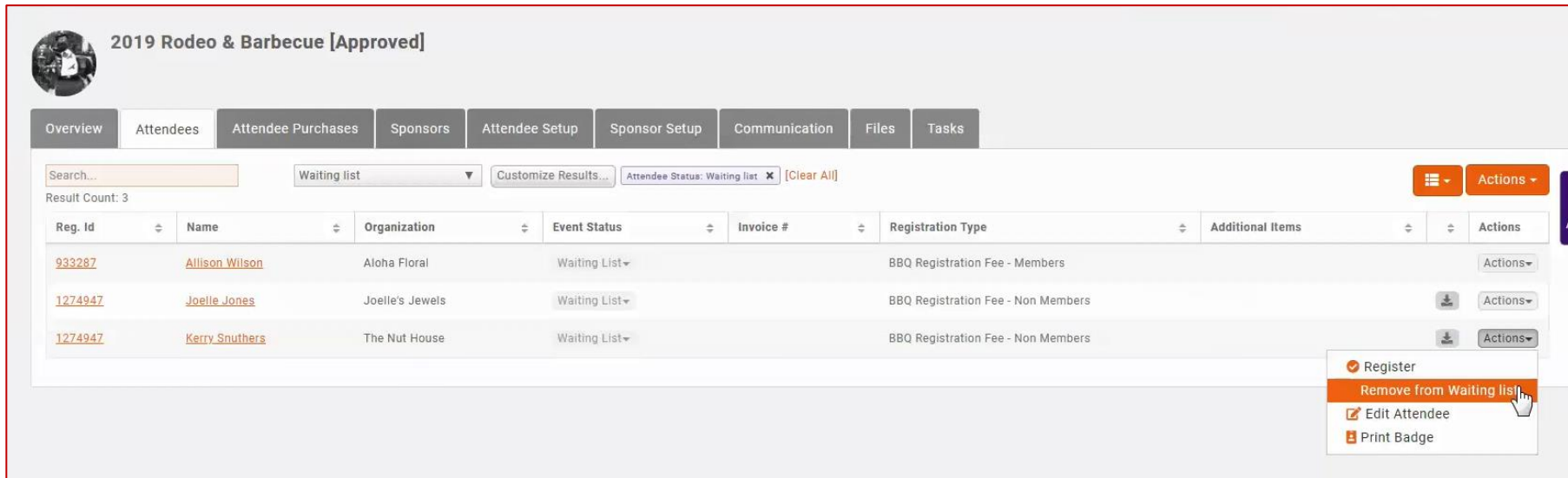
Managing the Event Waiting List

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

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

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

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
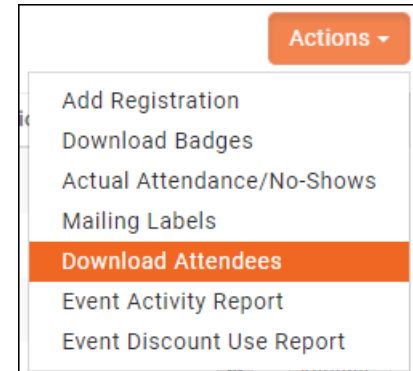
Checking in Attendees

You may check-in your attendees in several ways:

- GZ Knowledge Base: <u>From the Guest List</u>

- GZ Knowledge Base: <u>From the Actions on the Attendees Tab</u>

- GZ Knowledge Base: <u>Using the Staff App</u>

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
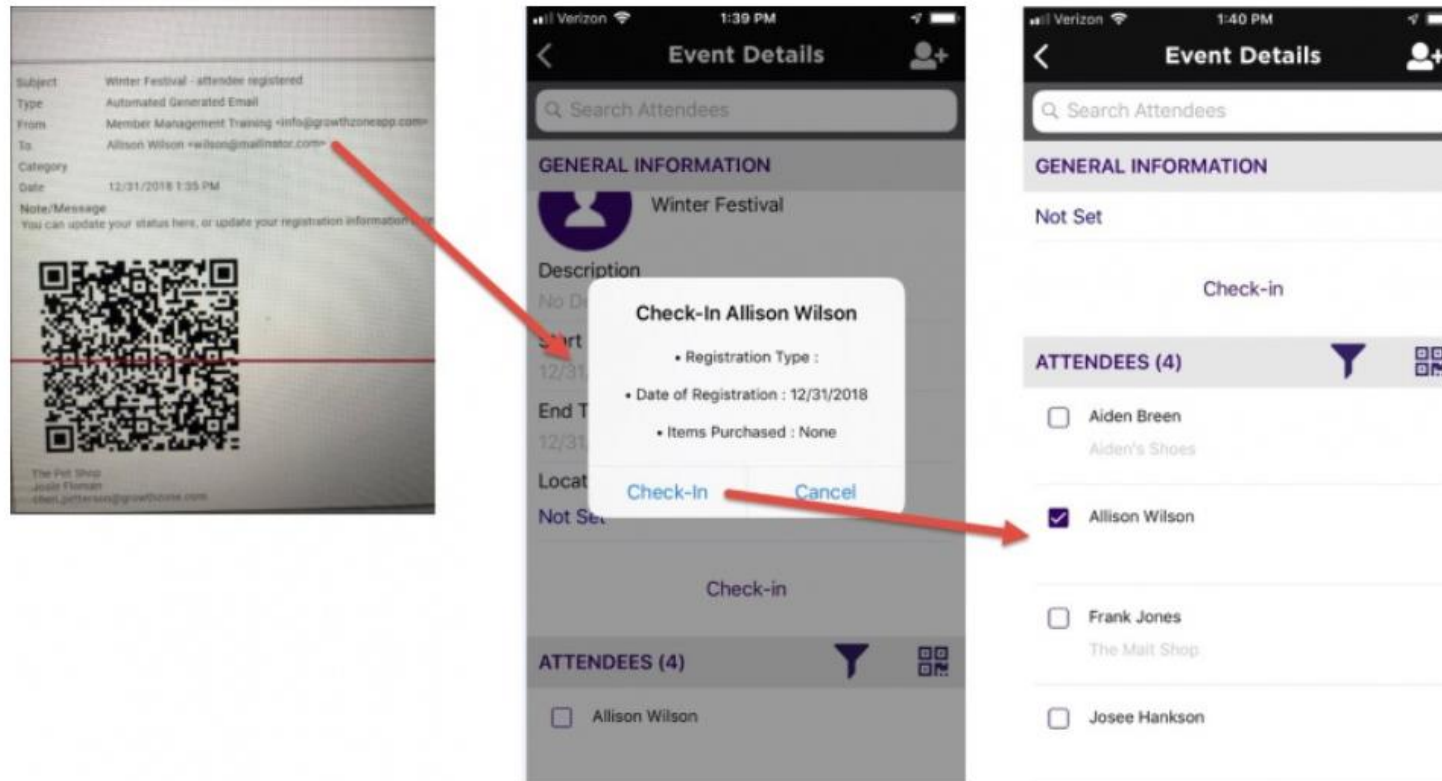
Event Reports

The system provides three event-related reports:

- **Event Attendees Report** (Available in **Reports** module only)

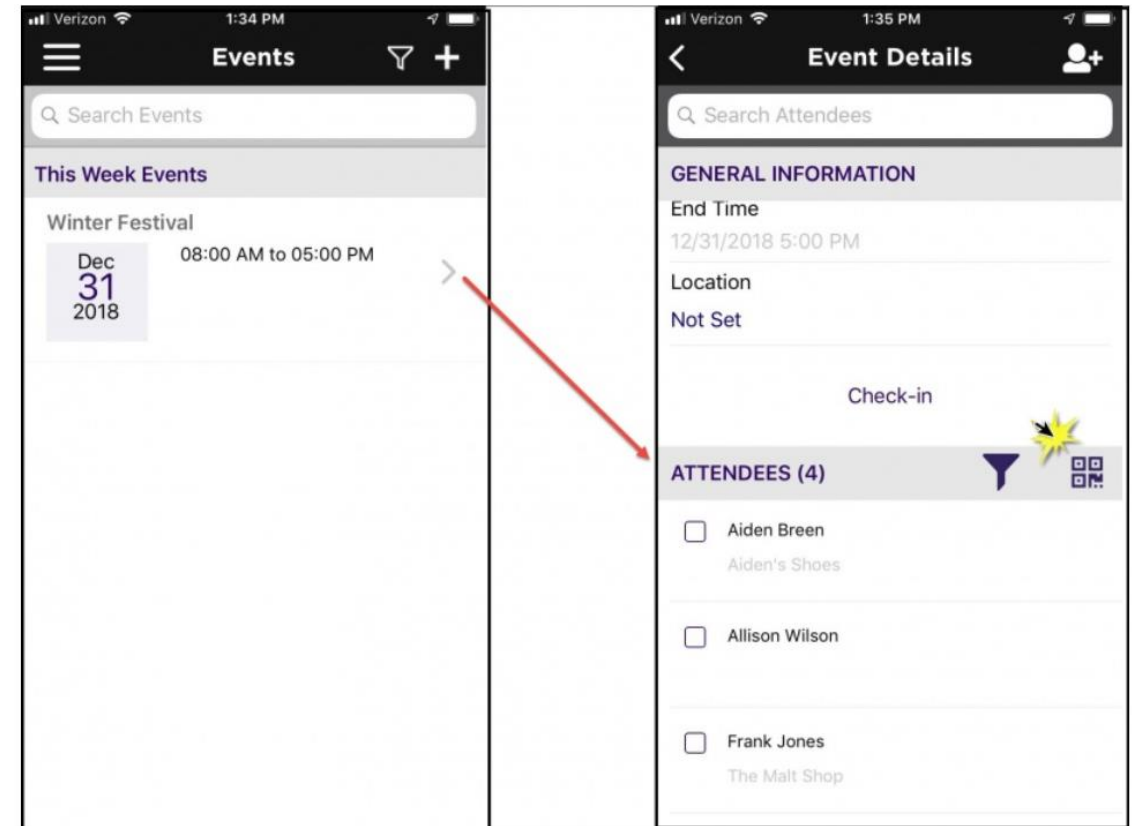- **Event Activity Report** (**Reports** module as well from the orange **Actions** button in both the **Attendees** and **Attendee Purchases** tab)

- **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:
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) »