

MANAGING EVENTS

Overview of Event Setup

Event Defaults

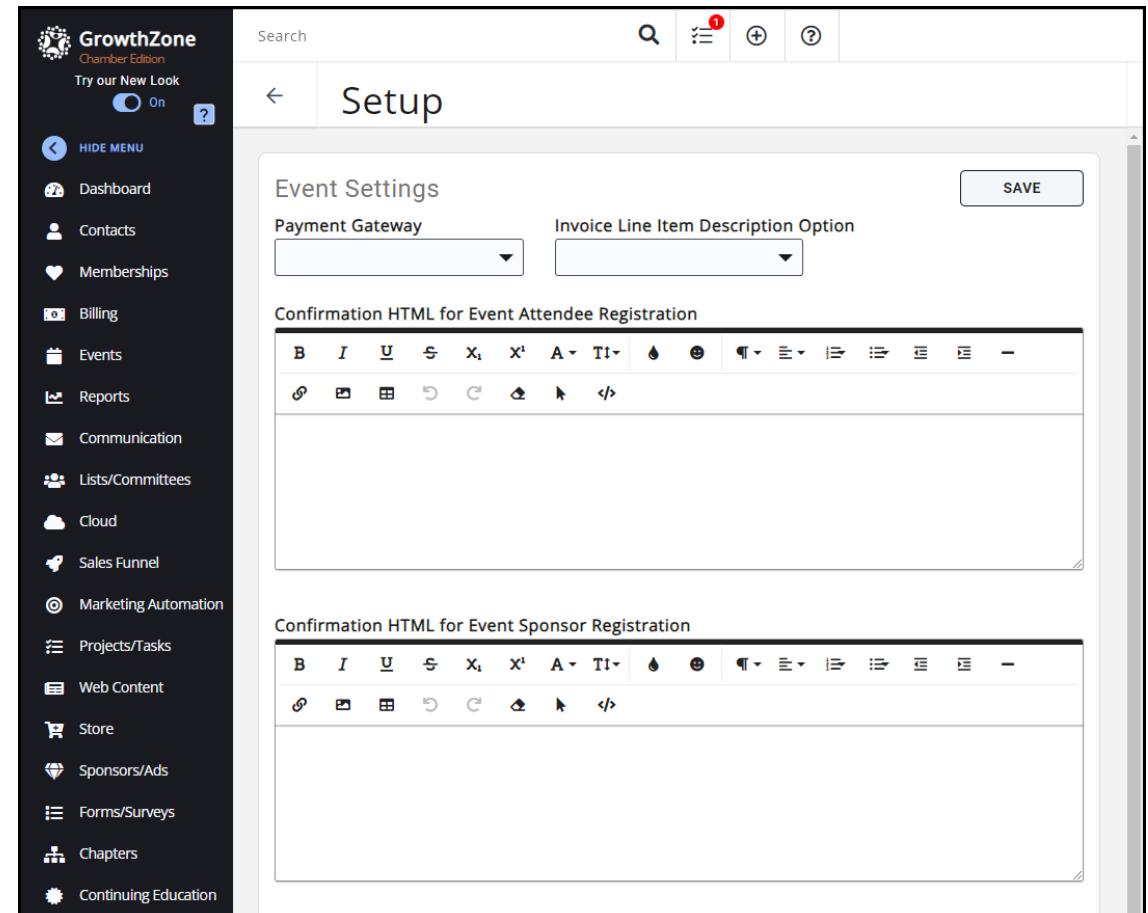
Configure defaults to be used for events

- Save time when creating events
- Can be overridden on event-by-event basis

Default Contact For Event Approval Tasks

Registration custom fields

No Show Fees



The screenshot shows the GrowthZone Chamber Edition Setup page. The left sidebar contains a navigation menu with items: Dashboard, Contacts, Memberships, Billing, Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, and Continuing Education. The main content area is titled 'Setup' and contains 'Event Settings'. It features two dropdown menus: 'Payment Gateway' and 'Invoice Line Item Description Option'. Below these are two rich text editors for 'Confirmation HTML for Event Attendee Registration' and 'Confirmation HTML for Event Sponsor Registration'. A 'SAVE' button is located in the top right corner of the settings area.

Event Calendars

Create multiple event calendars

Customize display

- Public
- Member-only
- Internal

Allow event submissions by members and/or public

Add Calendar

Name *

Description *

Options

Is Active

Is Public Viewable ⓘ

Is Member Viewable ⓘ

Allow Public Submission ⓘ

Allow Member Submission ⓘ

Calendar Feed ⓘ

Restrictions

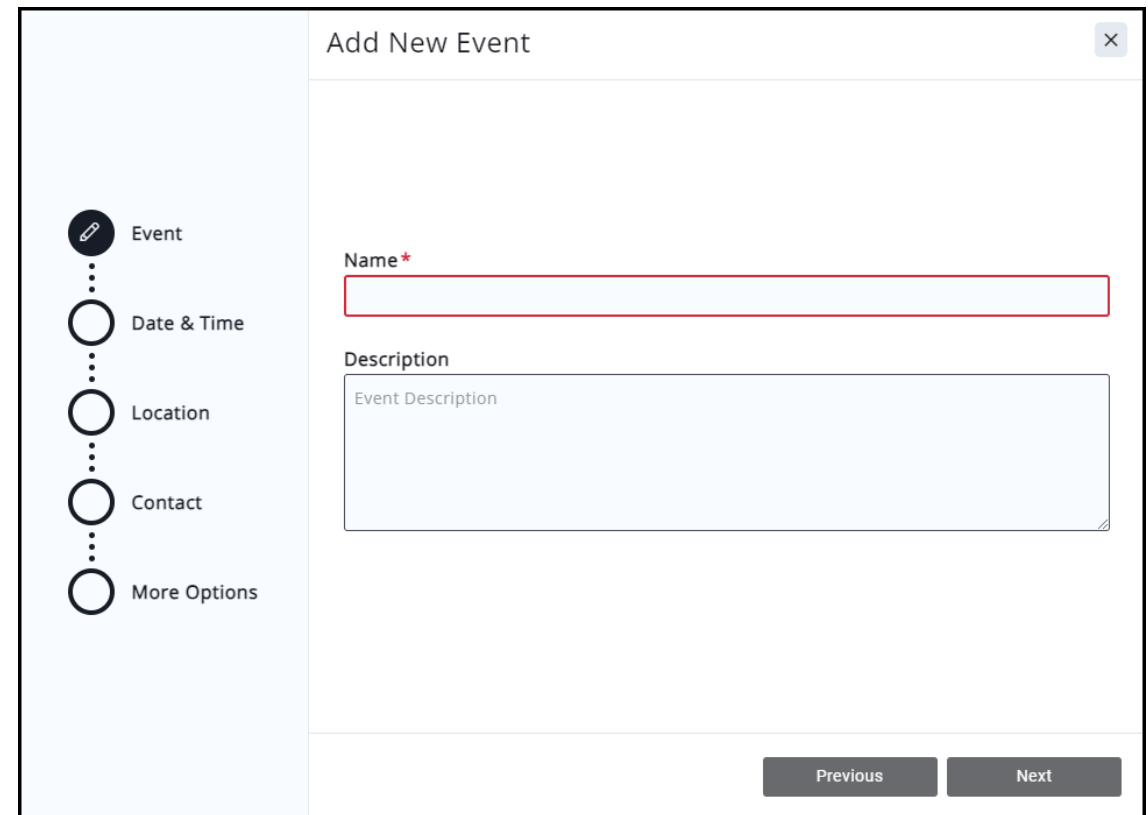
Restrict to List/Committee ⓘ

Cancel Done

Add a New Event

New Event Wizard walks through steps to create an event

- Event Description
- Date & Time
- Location
- Contact
- More Options
 - Category
 - Calendar
 - Sessions/Exhibitors



The screenshot displays the 'Add New Event' wizard interface. On the left, a vertical progress indicator shows five steps: 'Event' (selected with a pencil icon), 'Date & Time', 'Location', 'Contact', and 'More Options'. The main form area contains a 'Name*' field, a 'Description' field with a placeholder 'Event Description', and 'Previous' and 'Next' buttons at the bottom right.

View/Edit Event Details

Event Details found in Overview tab

- Hours
- Location
- Images and video
- Contact information
- Pricing
- Recurrence
- Event Custom Fields

Home Events

Description

Register »

Pricing

- \$25 per member
- \$200 per non-member
- \$400 per team (no more than 4 players per team, one player must be a member)

Click [here](#) for information on all the extras available for purchase during our tournament!

Interested in [Sponsorship packages](#) or [Marketing packages](#)?

Kalamazoo Country Club
1609 Whites Rd
Kalamazoo

Event Contact
Mary West
(23) 456-7890
Send Email

Saturday, May 18, 2024 (11:00 AM - 5:00 PM) (CDT)
Registration | 8 - 10:30 a.m.
Shotgun start | 10:30 a.m.
Reception | 3:30 - 5 p.m.

Categories
Community
Just For Fun
Sports & Recreation

Registered Guests
3 See Attendee List

Set Up Registration Types

Registration Options

Overall registration options

- Registration start/end date
- Enable/disable registration
- Enable waiting list
- Show list of registered guests
 - Restrict to members or general public
- Member validation
 - How system determines if registrant is a member to receive member pricing

The screenshot shows a configuration window titled "Overall Registration Options" with the following sections and settings:

- General Settings**
 - Registration Start Date: 1/13/2023 10:53 AM
 - Registration End Date: (empty)
 - Default Start Screen: Sign In de-emphasized
- Max Attendees**: (empty)
- Member Validation**: Anyone (Least Restrictive)
- Enable Registration**:
- Allow Waiting List**:
- Display Sponsor Registration Types**:

Billing and Checkout

- Allow Purchasing of Multiple Registration Types**:
- Allow Invoicing**:
- Include Invoice Link in Confirmation Email**:
- Collect Donations**:

Social Encouragement

- Show Registered Attendees Publicly**:
- Show Registered Attendees to Members**:
- Display Number of Registrants on Event Detail Page**:

Advanced

- Auto Refund Stop Date**: (empty)
- Session Changes Allowed Until**: (empty)

External Registration Link: (empty)

Buttons: Cancel, Done

Registration Form

Registrant's name and email required by default

- Configure additional required fields for registration
- Choose to display optional fields like address, phone number, common name

Configure term for additional attendees

- Guest, Partner, etc.

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 Custom Fields

Create custom fields to add to registration form

- Ex: meal choice, shirt size,

Track additional information about registrant

- Associate individual custom field responses to contact in database

Can be configured for internal-use only

Use previously created fields

Apply custom field to specific registration types

Attendees

Event Registration (Members Only) Attendees

Attendee #1 Total: \$40 - Discounts have been applied

Enter contact name and click search...

First Name Last Name Email Address Company Title

[More Information](#)

Additional Information

Additional Items

Name	Description	Price	Include
Golf Event T-Shirt	Event T-Shirt	\$15	<input type="text" value="0"/>

Event Registration Fees

Registration Types

- Free
- Paid
- Table/Team
- Advanced Type

Limit quantity of registrations available for event

Configure flexible pricing

- Member vs. nonmember

Limit registration types to specific memberships

Add Simple Paid Registration Type

Name* Max Available [ⓘ] Limit Per Purchase [ⓘ]

Description

Settings

Availability Limit to Memberships [ⓘ]
This feature is designed for Members only.

Is Displayed For Non-Members [ⓘ]

Fee Item* + Class Name Price

Benefit Items

Registration Messaging

Registration instructions

- Display above registration types available
- Customize instructions

Confirmation message

- Displayed upon completion of registration
- Included in confirmation email sent to guests
- Add last minute instructions or reminders

Select Registration Options

Attendee Registration Options

Please note that certain registrations include a number of attendees included in the price. For example, if you want to purchase 1 table of 2 attendees, please choose a quantity of 1.

Name	Price	Quantity
Special Seating (Members Only) Limit: 4 Price includes seating within the first five rows and your choice of available seats. Be sure to call our office to reserve your special seat numbers.	\$200 \$160	- 0 +
Special Seating Non-Members	\$300 \$240	- 0 +

Your attendee registration has successfully been submitted for Music and Wings Festival.

Thank you for registering for our festival. Remember to pack an umbrella as the show will go on rain or shine. If inclement weather (thunderstorms, dangerous winds) should occur, the music and food will be delayed until the storm passes.

Your registration ID is: 9998002

You can find your registration invoice in [here](#). You may wish to add this event to your:

- Google Calendar by clicking [here](#)
- Or to download iCal (Outlook, Apple, or other) click [here](#)

You can update your status [here](#), or update your registration information [here](#).

Manage Event Discounts

Discounts

Create variety of discounts

- Early registration
- Promo code
- Membership type
- Volume

Apply to all or selected event fee items

Run report on discount use

- Event Discount Use Report

The screenshot shows a form titled "Add Early Discount" with a close button (X) in the top right corner. The form is divided into several sections:

- General**
 - Name ***: A text input field.
 - Available Starting On ***: A date picker field.
 - Ends On ***: A date picker field.
 - Discount Type ***: A dropdown menu with a plus sign to the right.
- Discount Price**
 - Percentage
 - Amount
 - Set Price To
 - Three corresponding text input fields for values.
- Applies To (Registration Type)**: A dropdown menu.
- Total Available**: A text input field with the value "0".
- Limit Per Purchase**: A text input field with the value "0".

At the bottom right, there is a checkbox for "Advanced Options" which is checked, and two buttons: "Cancel" and "Done".

Selling Additional Items

Additional Items

Sell additional, optional items during event registration

Limit quantity of additional item available

- Once limit reached, item marked "Sold Out"

Allow purchase of additional item without requiring registration

Limit purchase to members, non-members, or staff

Additional Event Item

Name* Availability*

Description

Fee Item* Class Name Price*

Items Available [Ⓢ]

Options

For Staff

For Members

For Non-Members

Is Active

Sell Item as Yes/No

Manage the Guest List

Managing Event Registrations

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

Article: [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 tabbed interface allows switching between "Attendees" and "Attendee Purchases".

Attendees Tab: A table lists registered attendees with columns for Reg. Id, First Name, Last Name, Organization, Attendee Status, Ref #, and Registration Type. The filter "Attendee Status: Registered" is applied.

Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Regi
9269582	Brianna	MacKenzie	MacKenzies	Attended	634	Sing
9269582	Roger	MacKenzie	MacKenzies	Registered	634	Sing
9405547	Reserved Attendee 3	<No Last Name>	The White Council	Registered	641 x	Tear
9405547	Reserved Attendee 2	<No Last Name>	The White Council	Registered	641 x	Tear
9405547	Harry	Dresden	The White Council	Registered	641 x	Tear

Attendee Purchases Tab: A table shows financial details for each attendee, including Billing Name, Ref #, Discounts, Total, Balance, and Actions.

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 x	\$0.00	\$175.00	\$175.00	...
Jamie Fraser	642 x	\$0.00	\$100.00	\$100.00	...
Fergus Fraser	647 x	\$0.00	\$100.00	\$25.00	...

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

Search... X Attendee Status: Registered, Attended ADD REGISTRATION

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.

Article: [Cancel an Event Registration](#)

The screenshot displays two views of the 'Attendees' tab. The left view shows a list of attendees with a red box highlighting the 'Cancel Registration' option in the dropdown menu for a registration with a paid invoice (642 x). A green arrow points from the text 'Paid Invoice' to this registration. The right view shows a similar list with a red box highlighting the 'Cancel Registration' option for a registration with an unpaid invoice (641 x). A red arrow points from the text 'Unpaid Invoice' to this registration. Both dropdown menus also show options for 'Update Registration', 'Edit Attendee', 'View Sessions', and 'Resend Confirmation'.

ID	Name	Organization	Status	Invoice	Regtype	Team	Count	Actions
9446377	Jamie Fraser		Registered	642 x	Single Attendee (Afternoon...	Mackenzie/Fraser Team	2	...
9524587	William Wizard	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	Cally's Cupcakes	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	0	...
9635360	Cally Cupcakes	Cally's Cupcakes	Registered	658 ✓	Single Attendee (Afternoon...	New Table/Team	0	...
9635815	Robert Smith		Registered	659 ✓	New Single Regtype		0	...

Name	Status	Invoice	Regtype	Team	Count	Actions
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	...

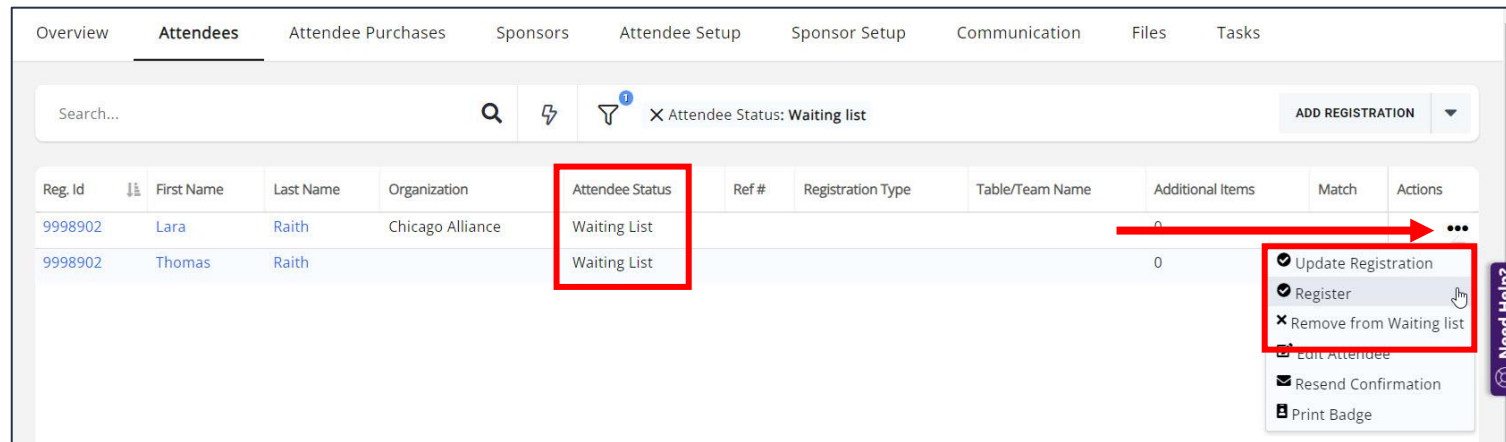
Paid Invoice

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.

Article: [Managing the Waiting List](#)



The screenshot shows the 'Attendees' tab in a software interface. The 'Attendee Status' column is highlighted in red. A red arrow points from the 'Attendee Status' column to the 'Actions' column, which is also highlighted in red. The 'Actions' column contains a dropdown menu with options: Update Registration, Register, Remove from Waiting list, Edit Attendee, Resend Confirmation, and Print Badge.

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				0		...
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

Table/Team Management

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

Unassigned Attendees
sort by [Attendee Name](#) | [Company Name](#) | [Reg.Type](#) | [RegId](#)

	RegId
Robert Smith New Single Regtype	9635815
Babydog Wizard Wizard's Supply Co- Deerwood Exhibitor Staff	9680401
Alexander Wizard Wizards Exhibitor Staff	9680401
Shelly Wizard Cami's Jammies Exhibitor Staff	9680401
William Wizard Wizard's Supply Co Exhibitor Staff	9680401

ADD A TABLE/TEAM REQUEST RESERVED ATTENDEE NAMES

Tables / Teams

Gray Team (Team of 4) 4 of 4

Harry Dresden The White Council Team of 4	9405547
Reserved Attendee 2 The White Council Team of 4	9405547
Reserved Attendee 3 The White Council Team of 4	9405547
Reserved Attendee 4 The White Council Team of 4	9405547

MacKenzie/Fraser Team (Team of 4) 3 of 4

Jamie Fraser Single Attendee (Afternoon Golf)	9446377
Brianna MacKenzie MacKenzies Single Attendee (Morning Golf)	9269582
Roger MacKenzie MacKenzies Single Attendee (Morning Golf)	9269582

New Table/Team (Team of 4) 4 of 4

Jack Wizard Wizards Exhibitor Staff	9680401
Karrin Murphy Chicago Alliance Comp Ticket	9866582

Close

Article: [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.

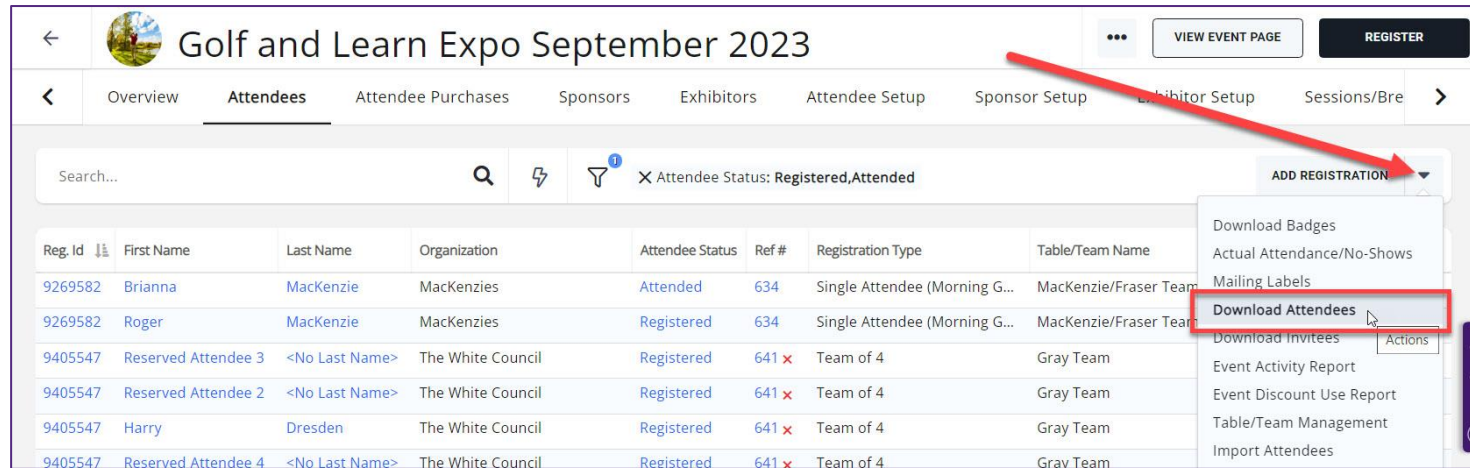
Reg. Id	First Name	Last Name	Organization	Attendee Status	Ref #	Registration Type	Table/Team Name	Additional Items	Match	Actions
9998847	Walter	Butters	Knights of the Sword	Registered				0		...
9998847	Sanya	NLA	Knights of the Sword	Registered				0		...
9998863	Hope	Carpenter		Registered				0	✗	...
9998863	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		...

Article: [Matching Registrants to Contacts](#)

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



Search... Q ⚡ 🔍 X Attendee Status: Registered, Attended ADD REGISTRATION

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

- Download Badges
- Actual Attendance/No-Shows
- Mailing Labels
- Download Attendees**
- Download Invitees
- Event Activity Report
- Event Discount Use Report
- Table/Team Management
- Import Attendees

Article: [Check-in Roster](#)

Checking in Attendees

You may check-in your attendees in several ways:

- [From the Guest List](#)
- [From the Attendees tab](#)
- [Using the Staff App](#)

Edit Attendance/No-Shows ✕

Search

Attendee Status	Reg. Id	First Name	Last Name	Organization	Attended/Showed
Registered	11089274	Tracy	Dockter	Crooked Lake Floral	No
Registered	11350556	Shelly	Bike	Shelly's Bike Rental	No
Registered	11350556	Reserved Attendee 4		Shelly's Bike Rental	No <input type="button" value="⊗"/>
Registered	11127813	Reserved		Bav Lake Coffee	No <input type="button" value="⊗"/>

WORKING WITH SPONSORS

Set Up Sponsorships

Default Settings

Terminology:

Change the system terminology of “Sponsors” if needed/preferred.

Article: [Changing Sponsor Terminology](#)

The screenshot displays the 'Golf and Learn Expo September 2023' management interface. The top navigation bar includes 'Overview', 'Attendees', 'Attendee Purchases', 'Partners', 'Exhibitors', 'Attendee Setup', 'Partner Setup', 'Exhibitor Setup', and 'Sessions/Break'. The 'Partner Setup' tab is active, showing a table of 'Partner Registration Types' with a 'Gold Partner' entry. A red box highlights the 'Edit Event Partnership' and 'Delete Partnership Type' options. Below, the 'Partners' section shows a grid of partner cards for Gold and Silver partners, including 'Cally's Cupcakes', 'Crooked Lake Coffee', 'Cami's Jammies', and 'Shelly's Seashells'.

Partner Registration Type	Count	Amount
Gold Partner	0	\$0.00

Partners

Gold Partner:

- Cally's Cupcakes
- Crooked Lake Coffee

Silver Partner:

- Cami's Jammies
- Shelly's Seashells

Default Settings

Add Sponsor Display Options ×

Sponsor Display Option Name

Event Page

Name

Logo

Link to website

Event Emails

Name

Logo

Registration Page

Name

Logo

Sponsor Display Options

Sponsor Display Options consist of any combination of the Sponsor Name, Logo, and/or URL appearing on the Event Page, Emails, and/or Registration page.

Article: [Sponsor Display Options](#)

Sponsor/Exhibitor Only Registration Type

Before you go to the Sponsor Setup tab:

- Are you including attendees with the purchase of a sponsorship?
- Do you want or need a sponsor-specific registration type?
- Do you need to know who will be attending at the time of registration, or do you want Sponsors to have the option of adding included attendee names later?

Article: [Set Up Your Event Registration Types](#)

Sponsor/Exhibitor Only Registration Type

These questions will help you determine:

- If you need to set up an attendee registration type to include with sponsor registrations
- If that attendee registration type needs to be separate than the other standard attendee registration type(s)
 - Use the “Only with Sponsor / Exhibitor” availability
- If that attendee registration type needs to be:
 - Free or Simple Paid type (must know all names during registration)
 - Or Table/Team type (only one name is required)

Article: [Set Up Sponsor Registration Type](#)

Sponsor Registration Options

Sponsor Registration Options ✕

General Settings

Registration Start [ⓘ] 📅 Registration End 📅 Default Start Screen Sign In de-emphasized ▼

Enable Registration [ⓘ]

Display All Attendee Registration Types [ⓘ]

Show Registration Link on Event Page [ⓘ]

Billing and Checkout

Allow Invoicing [ⓘ]

Include Invoice Link in Confirmation Email

Cancel Done

Article: [Set Up Sponsor Registration Options](#)

Setting Up Sponsor Registrations

Add Sponsor Registration Type

Details

Name* Sales Goal Max Available Position*

Max. 255 Max. 255

Description

0 / 255 max. count

Settings

Availability Limit to Memberships

Is Displayed For Non-Members

Included Attendees/Tables/Teams

Registration Type Quantity Included Unlimited

Fee Items

Fee Item	Class Name	Quantity	Price	Total	Hide
<input type="button" value="+"/>					

Display Options

Correlate your Sponsor Display Benefits with a Sponsor Registration Type, set the availability, and include any number of attendees you wish.

Article: [Set Up a Sponsor Registration Type](#)

Set Up Sponsor Messaging

Congratulations! Your registration is complete!

Sponsors

This is my special Sponsor Confirmation message. This would contain all kinds of sponsor-specific info for them and would be included in the sponsor's confirmation email.

Sponsor Name	Sponsor Type	Status	Total
Wizard's Supply Co- Deerwood	Silver Level- Name and Logo	Pending	\$7,500.00

Add to Calendar

Print

Attendees

Thank you for registering for Golf and Learn Expo.

Attendee Name	Registration Type	Status	Total
Jack Wizard	Exhibitor Staff	Registered	\$0.00
Babydog Wizard	Exhibitor Staff	Registered	\$0.00

Total: \$7,500.00

If nothing is entered for the Confirmation Message, the system will use the default page.

Set Up Sponsor Messaging

The image shows two overlapping screenshots from a software interface. The top screenshot, titled "Registration Instructions", features a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and code. Below the toolbar, the text reads: "These are the sponsor registration instructions, they appear directly above the sponsor registration options on the sponsor registration page." The bottom screenshot, titled "Select Registration Options", shows a table of sponsorship opportunities with columns for Name, Price, Included Attendees, and Quantity. Each row includes a description of the sponsorship level and a quantity selector with minus, plus, and remaining indicators. A "Continue" button is located at the bottom right of this section.

Registration Instructions

These are the sponsor registration instructions, they appear directly above the sponsor registration options on the sponsor registration page.

Select Registration Options

Sponsorship Opportunities

These are the sponsor registration instructions, they appear directly above the sponsor registration options on the sponsor registration page.

Name	Price	Included Attendees	Quantity
Gold Level- Name, Logo, and Link ↳ Your name, logo, and website link on all event	\$10,000	4	- 0 + 9 Remaining
Silver Level- Name and Logo ↳ Your name and logo on all event pages and	\$7,500	2	- 0 +
Bronze Level- Name only ↳ Your company name on all event pages and	\$5,000	2	- 0 +

Continue »

If you need or want to include specific instructions on the process for your sponsor registrations, you can use the Registration Options in the Sponsor Messaging window.

Article: [Sponsor Messaging](#)

Managing Sponsorships

Registering Sponsors

[Register Sponsors- Back Office](#)

aka "Register Sponsor (as Staff)"

[Register Sponsors- Online](#)

aka "Register Sponsor (as Non-staff)"

Approving Sponsors

Regardless if a Sponsor registers themselves OR if they are registered by staff, Sponsors MUST BE APPROVED before they will receive their Sponsor Display benefits.

The screenshot shows the 'Sponsors' management interface for the 'Golf and Learn Expo May 2024' event. The interface includes a search bar, a table of sponsorships, and an 'ADD SPONSOR' button. The table has the following data:

#	Sponsorship	Status	Sponsor Name	Ref #	Total	Balance	Match	Actions
254116	Gold Level- Name, Logo, and Link	Registered	Bay Lake Coffee	805	\$10,000.00	\$10,000.00		...
254200	Silver Level- Name and Logo	Pending	Wizard's Supply Co- Deerwood	807	\$7,500.00	\$7,500.00		...

The 'Pending' status in the second row is highlighted with a red box and a red arrow. A second red arrow points to the 'Actions' menu for this row, which contains the following options: Send Email, Cancel, Approve, Send Invoice, Download Invoice, Enter Check/Payment, and Enter Credit Card. The 'Approve' option is highlighted with a red circle and the number '2'. A red circle with the number '1' is also present near the 'Actions' menu.

Working with Registrations (both Attendee and Sponsor)

Working with Registrations

**We pre-sell our sponsorships at the beginning of the year,
before our events are set up.
How do I get that revenue into the event?**

Credit memos will allow you to track the revenue from the initial invoice and payment and transfer it to the event. This process works for sponsorships, exhibitors, or any presold event-related option.

Article: [Pre-Sold Sponsorships: Best Accounting Practices](#)

Working with Registrations

“Someone registered for the wrong registration type. How do I fix it?”

Steps:

- Cancel the existing registration; for sponsorships, be sure to cancel the related attendee registrations as well!
- [Create a credit memo](#) for the amount paid
- Use the [Register- As Staff](#) option to create a new registration for the correct type; select the “Pay By Invoice” option
- [Apply credit memo](#) to the new invoice
- Deliver invoice and collect remaining balance

Working with Registrations

“Can someone add items to their registration if they forgot or changed their mind?”

Attendees:

Yes, by using the “Update Registration Information” link in the confirmation email. If the invoice is paid, the invoice will be re-opened and modified to include the additional unpaid items.

Sponsors:

No. Follow the same steps as if they registered for the incorrect registration type.

Working with Registrations

“Can someone remove items from their registration if they changed their mind?”

Attendees:

No. Follow the same steps as if they registered for the incorrect registration type.

Sponsors:

No. Follow the same steps as if they registered for the incorrect registration type.