

GrowthZone Classroom Training: Working with Sponsors

SETTING UP SPONSORSHIPS

Default Settings

Terminology:

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

Article: [Changing Sponsor Terminology](#)

The screenshot displays the 'Partner Setup' configuration page for the 'Golf and Learn Expo September 2023' event. The navigation menu includes Overview, Attendees, Attendee Purchases, Partners, Exhibitors, Attendee Setup, Partner Setup, Exhibitor Setup, and Sessions/Break. The 'Partner Setup' section is active, showing a table of 'Partner Registration Types' with one entry: 'Gold Partner' with a count of 0 and a price of \$0.00. A red box highlights the 'Edit Event Partnership' and 'Delete Partnership Type' options for this entry. Below the table, a 'Partners' section is visible, showing a grid of partner cards for 'Gold Partner' (Cally's Cupcakes and Crooked Lake Coffee) and 'Silver Partner' (Cami's Jammies and Shelly's Seashells). A red box highlights this 'Partners' section. The bottom of the page shows an 'Images' section with several small images.

Partner Registration Types	Count	Price
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
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Display Options

Cancel Done

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

You can customize the message a Sponsor sees after submitting their Sponsor registration AND the confirmation email they receive in the Sponsor Messaging options.

Sponsor Messaging

Your unique sponsor confirmation message below will be inserted into the default sponsor confirmation email. It does not appear on-screen during checkout.

To change or check your default sponsor confirmation email template, look for the "Registered Event Sponsor" email template under Setup>Email Templates. By default, that template will also be selected as the template to be sent under Setup>Automated Messages.

Confirmation Email Template (optional)

Confirmation Message

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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, subscript, superscript, text color, background color, bulleted list, numbered list, link, unlink, table, undo, redo, link icon, 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 section for "Sponsorship Opportunities" with the same introductory text. Below this is a table with three columns: "Name", "Price", and "Included Attendees". Each row in the table includes a "Quantity" column with a minus button, a text input field containing "0", and a plus button. A "9 Remaining" indicator is shown below the first row's quantity controls. A "Continue >>" button is located at the bottom right of the "Select Registration Options" 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 for the second sponsor is highlighted with a red box and a red arrow. A second red arrow points to the 'Actions' menu for this sponsor, 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 a '2'. A 'Need Help?' button is visible on the right side of the interface.

WORKING WITH REGISTRATIONS (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.

THANK YOU!!!