

# GrowthZone – Managing Events

# Agenda

- Overview of Event Page
- Event Default Settings
- Setting up an Event
  - Add Event Registration Fees
  - Add Event Custom Fields
  - Add Event Discounts
- Manage Event Registrations
- Manage Event Invoicing

# GrowthZone Event Management

- Create and manage every aspect of an event from within the Events module
  - Member pricing
  - Publications, Invitations and other communication
  - Registration and Check-in
  - Invoicing and Payments
  - Reporting

# Event Defaults

- The Event Settings options allow you to configure the defaults to be used for your events. Setting up the defaults will save you time when creating events, and may be over-ridden as needed for individual events.
- Setup > Event > Event Settings
- [WIKI: Event Defaults](#)

# Event Calendars

- To display your events (whether publicly, member only, or internally) you will need to setup your calendars.
- You may have as many calendars as meets your needs
- Setup > Event > Calendars >Add
- [WIKI: Event Calendars](#)

# Calendar on the Website

## Main Calendar


Start Date:  End Date:

Category:


Search:

### Upcoming Events

[Switch to Calendar View](#)



**Run Ride or Roll** | Saturday, July 28, 2018  
Join your friends on the trail for this First Annual Run Ride or Roll. All ages and any size are welcome!



**Community Garage Sale** | Saturday, August 4, 2018  
Join us for our annual community garage sale.

## Main Calendar

Start Date:

Category:

Search:

[Switch to List View](#)


« Jul 2018 »

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	<b>7</b> Test Event
8	9	10	11	12	13	14
15	16	17	18	19	20	<b>21</b> From for Parents
22	23	24	25	26	27	<b>28</b> Run Ride or Roll
29	30	31				

# Event Page on the Website

## Run Ride or Roll

[Back to Calendar](#) [Register for Event](#)




trail by 8:00 am

Rollerbladers--plan to start between 8:15 and 8:45

Runners & Walkers--your start time is between 9:00 and 9:30

[123-598-9847](tel:123-598-9847)



**Event Details**

[f](#) [in](#) [t](#) [p](#)

**1st Annual**  
**Run Ride & Roll**

1000 Park Road  
Sauk Centre, MN 56378

Start and end at Lake Wobegon Trail Head in Sauk Centre, MN

Saturday, July 28, 2018 (6:00 AM - 2:00 PM)  
Check in a packet pickup begins at 6:00 am

Bikes & Unicycles--please be on the


### Pricing

- 35 miles on wheels--\$50 (2 rest stops)
- 10 miles, ride or run--\$35 (1 rest stop)
  - 2-person relay (switch at the rest stop)--\$60/team
- 3 miles, ride or run--\$20 (no rest stop until the end!)

**10% discount** for groups registering 4 or more on the same registration form

**Additional 10% discount** if you are an UNRA Member! [Click here to join!](#)


### Videos



Tour of Saints  
5.3K views · 1 ago

SUBSCRIBE

### Gallery



### Additional Information

Contact Organization:  
Unicycle Riders of North America

[123-598-9847](tel:123-598-9847)

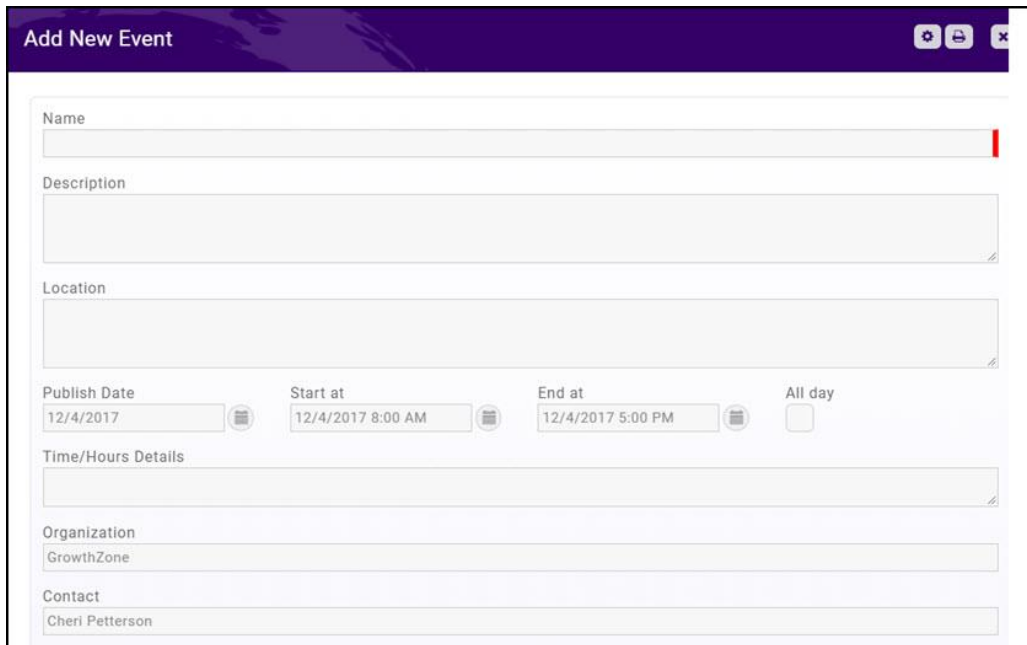
Email:  
[susan@mallinator.com](mailto:susan@mallinator.com)

Contact Description:  
For information about volunteering, please contact Jody and 123-895-8746

[Get Directions](#)

# Add a New Event

- Events Module > List View >> Add New Event



**Add New Event**

Name

Description

Location

Publish Date: 12/4/2017

Start at: 12/4/2017 8:00 AM

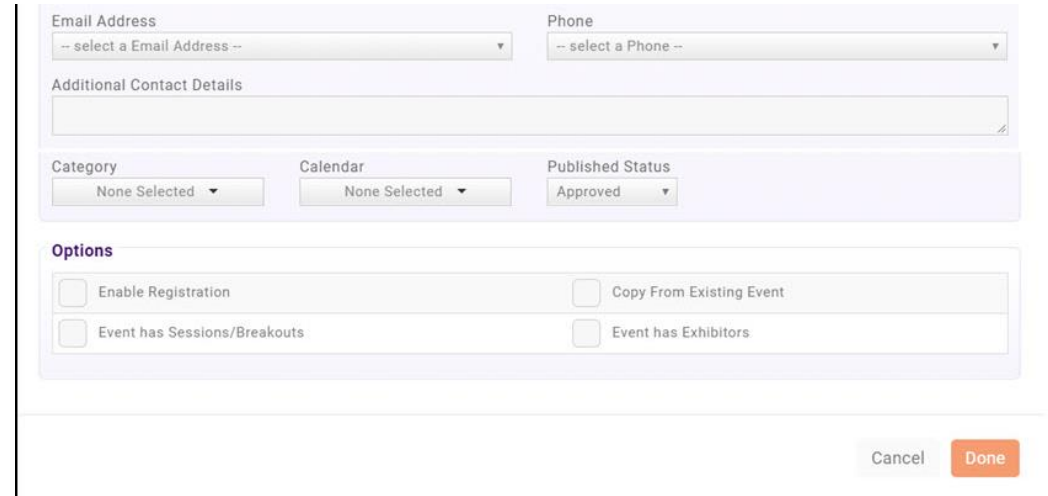
End at: 12/4/2017 5:00 PM

All day:

Time/Hours Details

Organization: GrowthZone

Contact: Cheri Petterson



Email Address: -- select a Email Address --

Phone: -- select a Phone --

Additional Contact Details

Category: None Selected

Calendar: None Selected

Published Status: Approved

**Options**

Enable Registration

Copy From Existing Event

Event has Sessions/Breakouts

Event has Exhibitors

Cancel Done

[Add a New Event](#)



# Copy an Existing Event

- Existing Event > Actions Ribbon > Copy This Event

**Copy Event**

Name  
New Indian Feast [September 23, 2017 5:00 PM - September 23, 2017 11:00 PM]

Description  
<p><span style="color: rgb(85, 57, 130);">New Indian Feast</span></p><p><a href="http://www.indiahouse.com" rel="noopener noreferrer" target="\_blank"><span style="color: rgb(85, 57, 130);">www.indiahouse.com</span></a></p>

Location  
<p>India House</p>

Active Date 9/18/2017 Start at 9/23/2017 5:00 PM End at 9/23/2017 11:00 PM All day

Time/Hours Details  
<p>5pm Hors D&#39;oeuvres</p><p>6pm Dinner

Organization  
Member Management Training

Contact  
Cheri Petterson

Email Address -- select a Email Address -- Phone -- select a Phone --

Event Contact Details

**Options**

Enable Registration  Copy From Existing Event

Event has Sessions/Breakouts  Event has Exhibitors

**Event Name**  
New Indian Feast

Copy Tasks  Copy Attendees  Copy Attendee Setup  Copy Exhibitors

Copy Exhibitor Setup  Copy Files

Name Due Date Task Priority System Task Type Start Date


Rent AV Equipment Important -- No Choice -- 9/25/2017

Cancel Done

[Copy an Existing Event](#)

# Edit Event Details

- Overview Tab of the Event


Prom for Parents [Approved]

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

**General Information**

Name	Prom for Parents
Status	Approved
Publish Date	3/14/2018
Category	Community, Fundraising
Calendar	Main Calendar
Created By	Susan Williams
Created Date	3/14/2018 10:31 AM

**Description**

A fun night out for all the parents, aunts & uncles, grandparents, and community members. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc nec lacus et dui ultrices rhoncus. Donec at arcu non elit cursus cursus. Aliquam volutpat enim id justo elementum, facilisis ornare purus consectetur. Sed in risus id nibh maximus semper id sed ligula. Curabitur feugiat lorem at ex consequat, quis maximus felis sollicitudin. Aliquam eu ex consectetur, aliquam elit quis, venenatis eros. Mauris arcu risus, euismod in enim sagittis, facilisis elementum lectus. In aliquam, odio ut varius vulputate, ante quam ultricies dui, eget vestibulum ex mi quis ex. Integer sollicitudin et orci sit amet commodo. Nam ac metus nec mauris imperdiet tristique vitae sit amet nisi. Aenean in libero porta, sollicitudin nunc commodo, ornare ex. Donec egestas


**Registrations**

Invited	35
Registered	11
Attended	6
Paid/Free Registrations	3
Unpaid Registrations	14

**Contact Information**

Organization	Unicycle Riders of North America
Person	
Contact Details	Contact Joann at the Chamber for info on dining discounts, 125-985-8746
Contact Email	
Contact Phone	

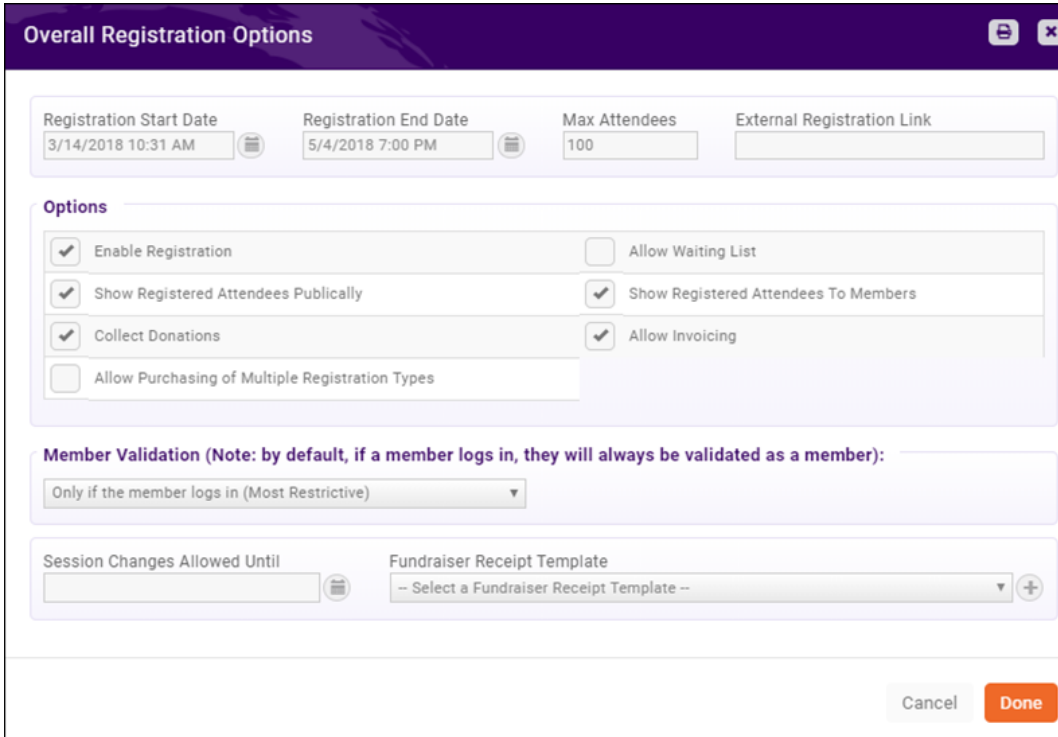
**Hours**


  
 Actions

[Edit Event Details](#)

# Registration Options

- Attendee Setup Tab of the Event > Overall Registration Options



The screenshot shows a web form titled "Overall Registration Options" with a purple header. The form contains several input fields and checkboxes. At the top, there are four fields: "Registration Start Date" (3/14/2018 10:31 AM), "Registration End Date" (5/4/2018 7:00 PM), "Max Attendees" (100), and "External Registration Link". Below this is an "Options" section with a grid of checkboxes. The "Member Validation" section has a dropdown menu set to "Only if the member logs in (Most Restrictive)". The "Session Changes Allowed Until" field is empty, and the "Fundraiser Receipt Template" dropdown is set to "-- Select a Fundraiser Receipt Template --". At the bottom right, there are "Cancel" and "Done" buttons.

Registration Start Date	Registration End Date	Max Attendees	External Registration Link
3/14/2018 10:31 AM	5/4/2018 7:00 PM	100	

**Options**

<input checked="" type="checkbox"/> Enable Registration	<input type="checkbox"/> Allow Waiting List
<input checked="" type="checkbox"/> Show Registered Attendees Publically	<input checked="" type="checkbox"/> Show Registered Attendees To Members
<input checked="" type="checkbox"/> Collect Donations	<input checked="" type="checkbox"/> Allow Invoicing
<input type="checkbox"/> Allow Purchasing of Multiple Registration Types	

**Member Validation (Note: by default, if a member logs in, they will always be validated as a member):**

Only if the member logs in (Most Restrictive)

Session Changes Allowed Until: [Empty field]

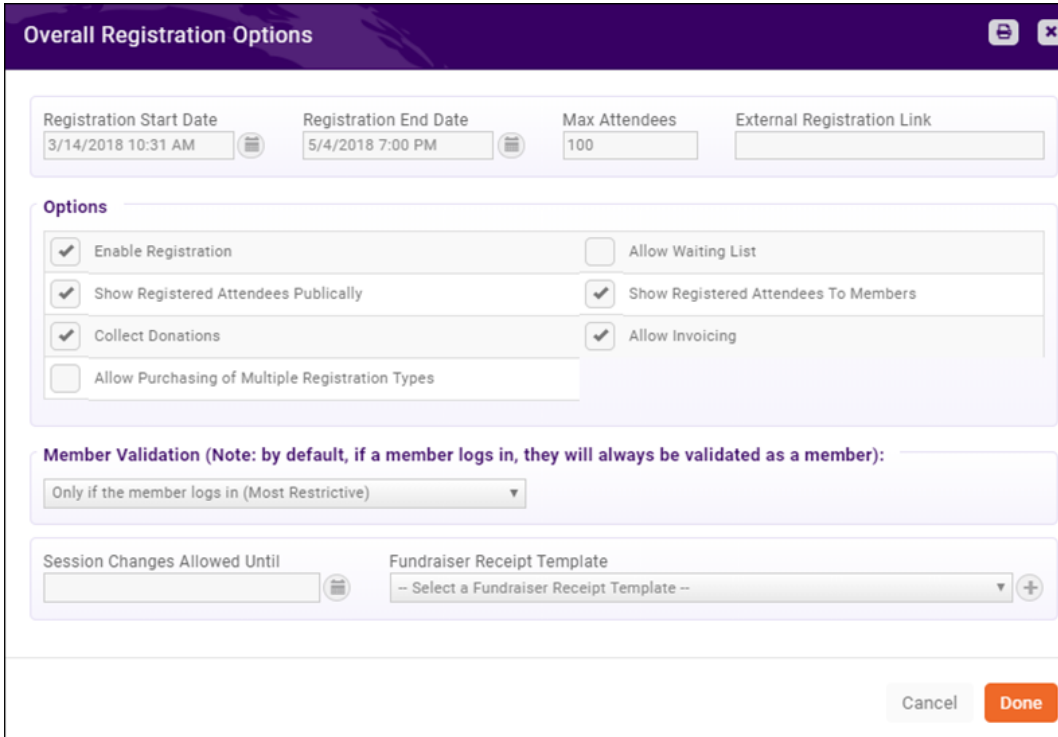
Fundraiser Receipt Template: -- Select a Fundraiser Receipt Template --

Buttons: Cancel, Done

[Registration Options](#)

# Registration Options

- Attendee Setup Tab of the Event > Overall Registration Options



The screenshot shows a dialog box titled "Overall Registration Options" with a purple header. It contains several input fields and checkboxes. At the top, there are four fields: "Registration Start Date" (3/14/2018 10:31 AM), "Registration End Date" (5/4/2018 7:00 PM), "Max Attendees" (100), and "External Registration Link". Below these is an "Options" section with a grid of checkboxes. The "Member Validation" section has a dropdown menu set to "Only if the member logs in (Most Restrictive)". At the bottom, there are "Session Changes Allowed Until" and "Fundraiser Receipt Template" fields. The dialog ends with "Cancel" and "Done" buttons.

Registration Start Date	Registration End Date	Max Attendees	External Registration Link
3/14/2018 10:31 AM	5/4/2018 7:00 PM	100	

**Options**

<input checked="" type="checkbox"/> Enable Registration	<input type="checkbox"/> Allow Waiting List
<input checked="" type="checkbox"/> Show Registered Attendees Publically	<input checked="" type="checkbox"/> Show Registered Attendees To Members
<input checked="" type="checkbox"/> Collect Donations	<input checked="" type="checkbox"/> Allow Invoicing
<input type="checkbox"/> Allow Purchasing of Multiple Registration Types	

**Member Validation (Note: by default, if a member logs in, they will always be validated as a member):**

Only if the member logs in (Most Restrictive)

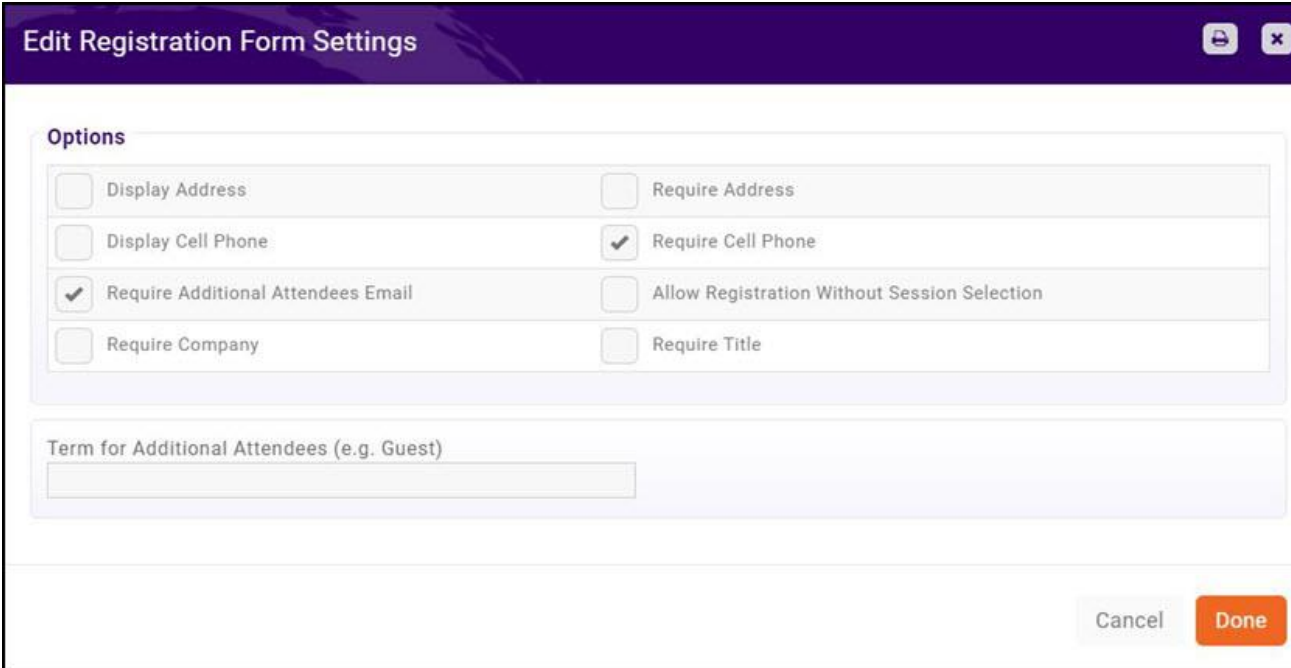
Session Changes Allowed Until: [ ] Fundraiser Receipt Template: -- Select a Fundraiser Receipt Template --

Cancel Done

[Registration Options](#)

# Registration Form

- Attendee Setup Tab of the Event > Registration Form Settings



**Edit Registration Form Settings**

**Options**

<input type="checkbox"/> Display Address	<input type="checkbox"/> Require Address
<input type="checkbox"/> Display Cell Phone	<input checked="" type="checkbox"/> Require Cell Phone
<input checked="" type="checkbox"/> Require Additional Attendees Email	<input type="checkbox"/> Allow Registration Without Session Selection
<input type="checkbox"/> Require Company	<input type="checkbox"/> Require Title

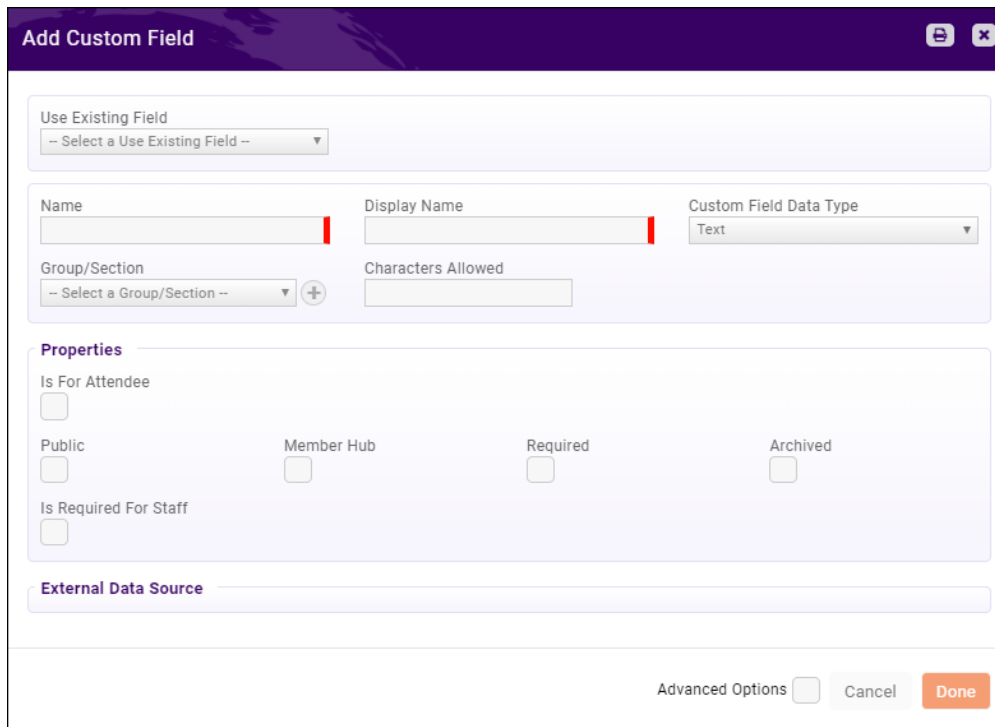
Term for Additional Attendees (e.g. Guest)

Cancel Done

[Registration Form Settings](#)

# Event Custom Fields

- Attendee Setup Tab > Manage Custom Fields > Add Custom Field



The screenshot shows a dialog box titled "Add Custom Field" with the following fields and options:

- Use Existing Field:** A dropdown menu with the option "-- Select a Use Existing Field --".
- Name:** A text input field.
- Display Name:** A text input field.
- Custom Field Data Type:** A dropdown menu currently set to "Text".
- Group/Section:** A dropdown menu with the option "-- Select a Group/Section --" and a plus sign icon.
- Characters Allowed:** A text input field.
- Properties:** A section containing several checkboxes:
  - Is For Attendee:
  - Public:
  - Member Hub:
  - Required:
  - Archived:
  - Is Required For Staff:
- External Data Source:** A text input field.
- Advanced Options:** A checkbox.
- Buttons:** "Cancel" and "Done" buttons.

[Event Custom Fields](#)

# Event Fees--Registration

- Attendee Setup Tab > Registration Types > Add Type

Registration Types <span style="float: right;">+ Add Type ▾</span>				
Name	Price	Available to Contacts	Available to Non-Members	Actions
Non-Member Dinner Fee	\$75.00	Yes	Yes	
Member Dinner Fee	\$50.00	Yes	Yes	

+ Add Type ▾

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Add Free Registration Type

Add Simple Paid Registration Type

Add Table/Group Registration Type

Add Advanced Type

[Event Fees--Registration](#)

# Event Fees—Discounts

- Attendee Setup Tab > Registration Types > Add Type

Global	Name	Promo Code	Start Date	End Date	Applies To	Reg. Type	Actions
Yes	Group of 4 Discount				Quantity discount over 4		Add Early Registration Discount Add Promo Code Discount Add Discount for Membership Type Add Volume Discount
Yes	Early Bird Discount		7/24/2018	7/26/2018			

**Add Early Discount**

Name: \_\_\_\_\_

Discount Available Starting On: \_\_\_\_\_ Ends On: \_\_\_\_\_

Discount Price Method:  Reduce Price by Percentage  Reduce Price by Amount

Applies To (Registration Type): \_\_\_\_\_ Total Available: \_\_\_\_\_

Can Be Used With Other Discounts:

**Add Membership Type Discount**

Name: \_\_\_\_\_

Available Starting On: \_\_\_\_\_ Ends On: \_\_\_\_\_

Membership Type: --Select a Membership Type--

Discount Price Method:  Reduce Price by Amount  Set Price To

Total Available: \_\_\_\_\_ Limit Per Purchase: \_\_\_\_\_

Can Be Used With Other Discounts:

**Add Volume Discount**

Name: \_\_\_\_\_

Available Starting On: \_\_\_\_\_ Ends On: \_\_\_\_\_

Minimum Quantity for Discount: \_\_\_\_\_

Discount Price Method:  Reduce Price by Percentage  Reduce Price by Amount  Set Price To

Applies To (Registration Type): \_\_\_\_\_ Total Available: \_\_\_\_\_ Limit Per Purchase: \_\_\_\_\_

Can Be Used With Other Discounts:

**Add Promotion Code Discount**

Name: \_\_\_\_\_

Available Starting On: \_\_\_\_\_ Ends On: \_\_\_\_\_

Promotion Code: \_\_\_\_\_

Discount Price Method:  Reduce Price by Percentage  Reduce Price by Amount  Set Price To

Applies To (Registration Type): \_\_\_\_\_ Total Available: \_\_\_\_\_ Limit Per Purchase: \_\_\_\_\_

Can Be Used With Other Discounts:

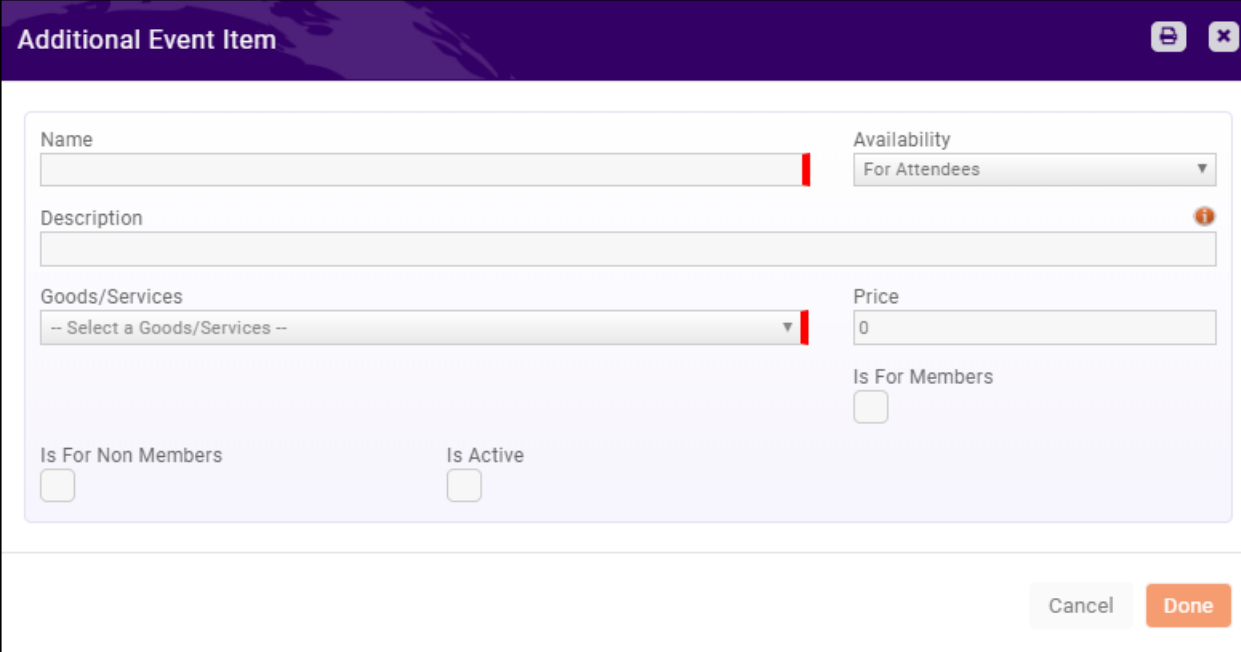
Advanced Options  Cancel Done

[Event Fees--Discounts](#)



# Event Fees—Additional Items

- Attendee Setup Tab > Registration Types > Add Type



The screenshot shows a web form titled "Additional Event Item" with a dark purple header. The form contains several input fields and checkboxes:

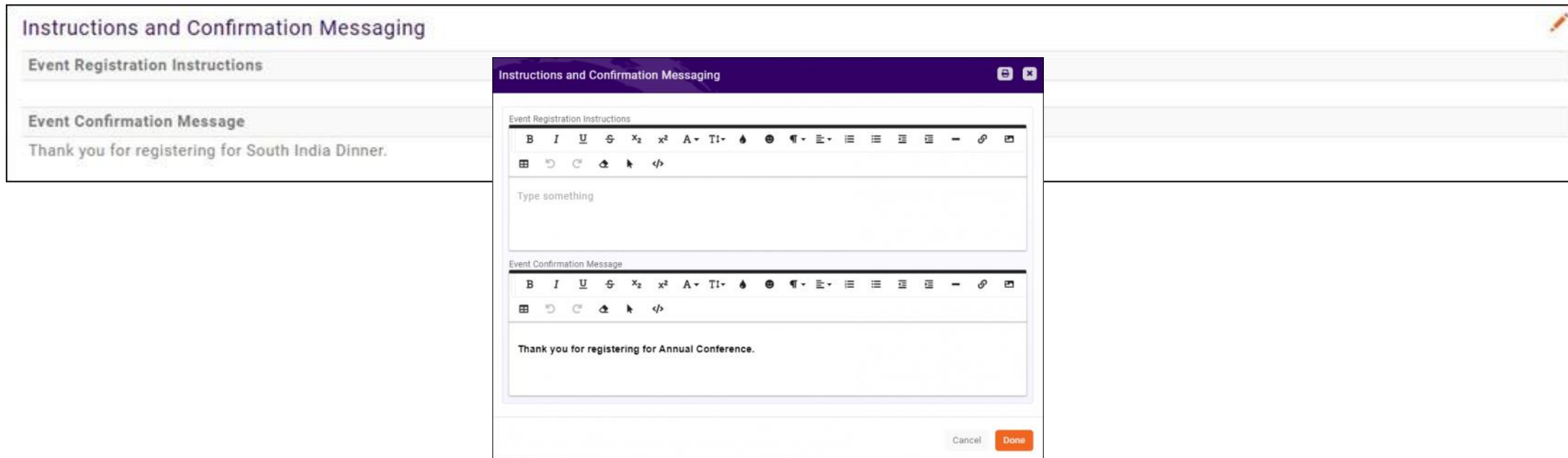
- Name:** A text input field with a red vertical bar on the right side.
- Availability:** A dropdown menu currently set to "For Attendees".
- Description:** A text input field with a small red information icon on the right.
- Goods/Services:** A dropdown menu currently set to "-- Select a Goods/Services --".
- Price:** A text input field containing the value "0".
- Is For Members:** A checkbox that is currently unchecked.
- Is For Non Members:** A checkbox that is currently unchecked.
- Is Active:** A checkbox that is currently unchecked.

At the bottom right of the form, there are two buttons: "Cancel" (grey) and "Done" (orange).

[Event Fees--Additional Items](#)

# Registration Messages

- Attendee Setup Tab > Instructions and Confirmation Messaging

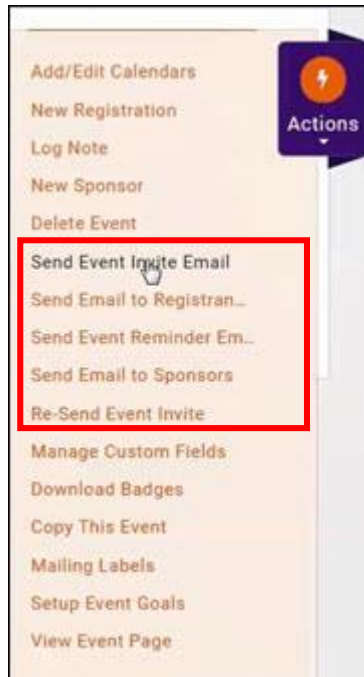


The screenshot displays the 'Instructions and Confirmation Messaging' interface. On the left, a sidebar lists two sections: 'Event Registration Instructions' and 'Event Confirmation Message'. The 'Event Confirmation Message' section shows the text 'Thank you for registering for South India Dinner.' A modal window titled 'Instructions and Confirmation Messaging' is open in the center, showing a rich text editor for editing the messages. The modal has two sections: 'Event Registration Instructions' with a text area containing 'Type something' and 'Event Confirmation Message' with a text area containing 'Thank you for registering for Annual Conference.' Both sections have a rich text toolbar with options for bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, and outdent. At the bottom of the modal are 'Cancel' and 'Done' buttons.

[Registration Messages](#)

# Event Communications

- Actions Ribbon from any tab



[Event Communications](#)

# Managing Registrations/Attendees

- Attendee Tab

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
<a href="#">988041</a>	<a href="#">jack sprat</a>		Registered	174	Table of 8--do not reserve for all		Actions
<a href="#">988038</a>	<a href="#">Sam Donaldson</a>		Registered	173	table of 8--reserve all		Actions
<a href="#">988038</a>	<a href="#">My Friend</a>		Registered	173	table of 8--reserve all		Actions
<a href="#">934549</a>	<a href="#">Clara Naples</a>	CN Consulting	Registered	171	Single Person	2	Actions
<a href="#">934548</a>	<a href="#">Doyle Burbank</a>	Ladish Malting	Registered	169	Single Person		Actions
<a href="#">934547</a>	<a href="#">William Denning</a>	Bill's Guided Tours	Registered	167	Couple		Actions
<a href="#">934547</a>	<a href="#">Katie Denning</a>		Registered	167	Couple		Actions
<a href="#">934546</a>	<a href="#">Dan Meyer</a>	Meyer Consulting	Registered	166	Couple	3	Actions

Managing Registrations/Attendees

# Matching Registrants to Contacts

- Attendee Tab > Icons

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

[Matching Registrants to Icons](#)

# Cancelling a Registration

- Attendee Tab > Gray Actions Button

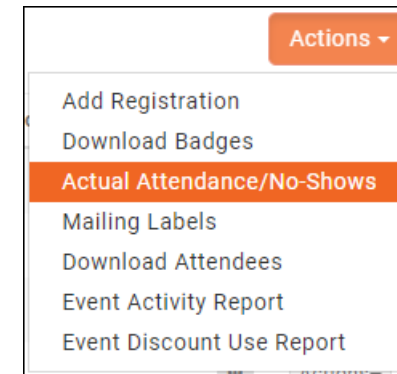
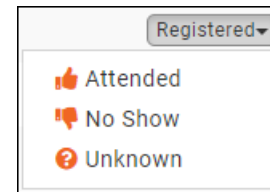
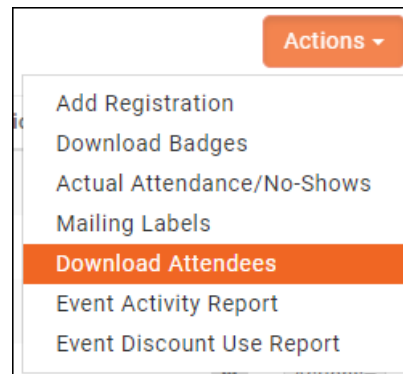
The screenshot displays the 'Attendee' management interface. At the top, there are navigation tabs: Overview, Attendee, Attendee Purchases, Sponsors, Attendee Setup, Sponsor Setup, Communication, Files, and Tasks. Below these is a search bar and filters for 'Registered or Attended' status and 'Attendee Status' (Registered/Attended). A table lists attendees with columns for Reg. Id, Name, Organization, Event Status, Invoice #, Registration Type, and Additional Items. The 'Actions' column for each row contains a 'Actions' button. The button for the second attendee, 'Wes Wozic', is highlighted with a red box. A red arrow points from this button to a detailed view of the 'Actions' menu. This menu is split into two sections: 'Unpaid Invoice' and 'Paid Invoice'. The 'Unpaid Invoice' section includes options: Cancel Registration, Edit Attendee, Enter Check/Payment, Enter Credit Card, and Print Badge. The 'Paid Invoice' section includes: Cancel Registration, Edit Attendee, and Print Badge.

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
334547	William Gessner	Bill's Guest House	Registered	187	Couple		Actions
610651	Wes Wozic		Attended		Pay at the Door/Please invoice Me		Actions
628604	Tyasha Nalae		Attended	81	Session 2		Actions

[Cancelling a Registration](#)

# Managing Attendance

- Attendee Tab > Gray Actions Button
- App



[Managing Attendance](#)

# Event Payments & Invoices

- Attendee Tab or Attendee Purchases Tab > Gray Actions Button



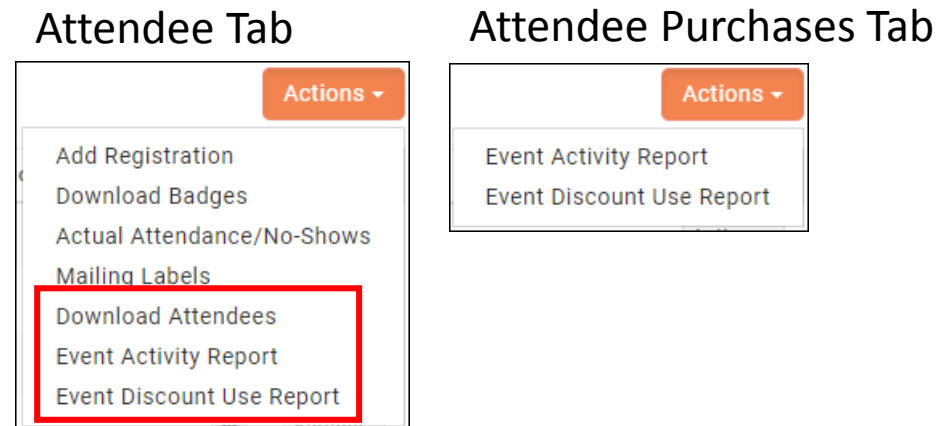
- Can also manage from the Contact Record > Account Tab

[Event Payments & Invoices](#)



# Event Reports

- Attendee Tab or Attendee Purchases Tab > Orange Actions Button



- Also available via the Reports module

[Event Reporting](#)