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

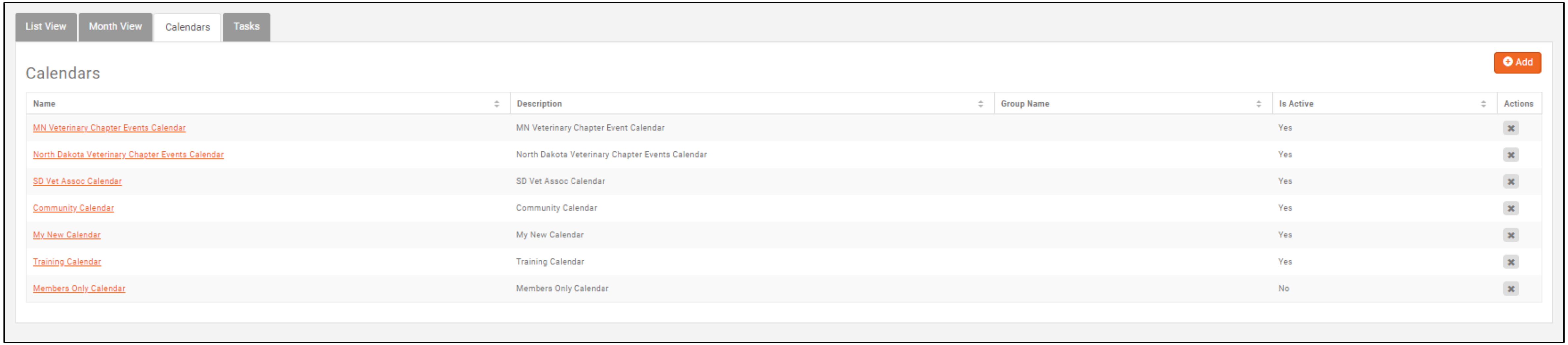
Event Defaults

The Event Settings options allow you to configure the defaults to be used for your events. WIKI: Event Defaults

Event Calendars

To display your events, you will need to setup your calendars.

[WIKI: Event Calendars]

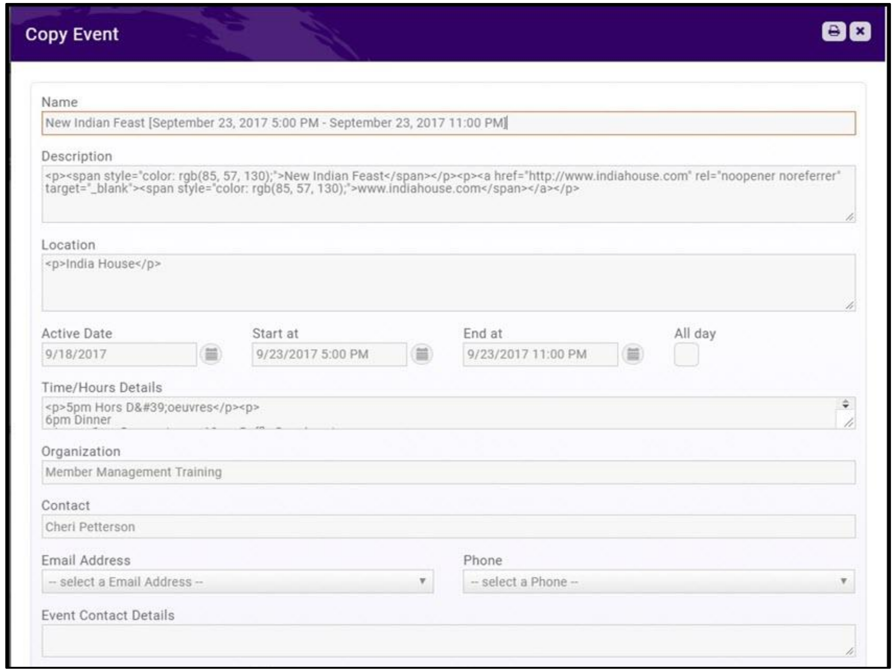


Name	Description	Group Name	Is Active	Actions
MN Veterinary Chapter Events Calendar	MN Veterinary Chapter Event Calendar		Yes	
North Dakota Veterinary Chapter Events Calendar	North Dakota Veterinary Chapter Events Calendar		Yes	
SD Vet Assoc Calendar	SD Vet Assoc Calendar		Yes	
Community Calendar	Community Calendar		Yes	
My New Calendar	My New Calendar		Yes	
Training Calendar	Training Calendar		Yes	
Members Only Calendar	Members Only Calendar		No	

Copy an Existing Event

If you run the same events regularly, you can copy an existing event and save yourself some setup time. You can determine key setup items you would like to copy, such as Attendee Setup, Tasks, Files, etc.

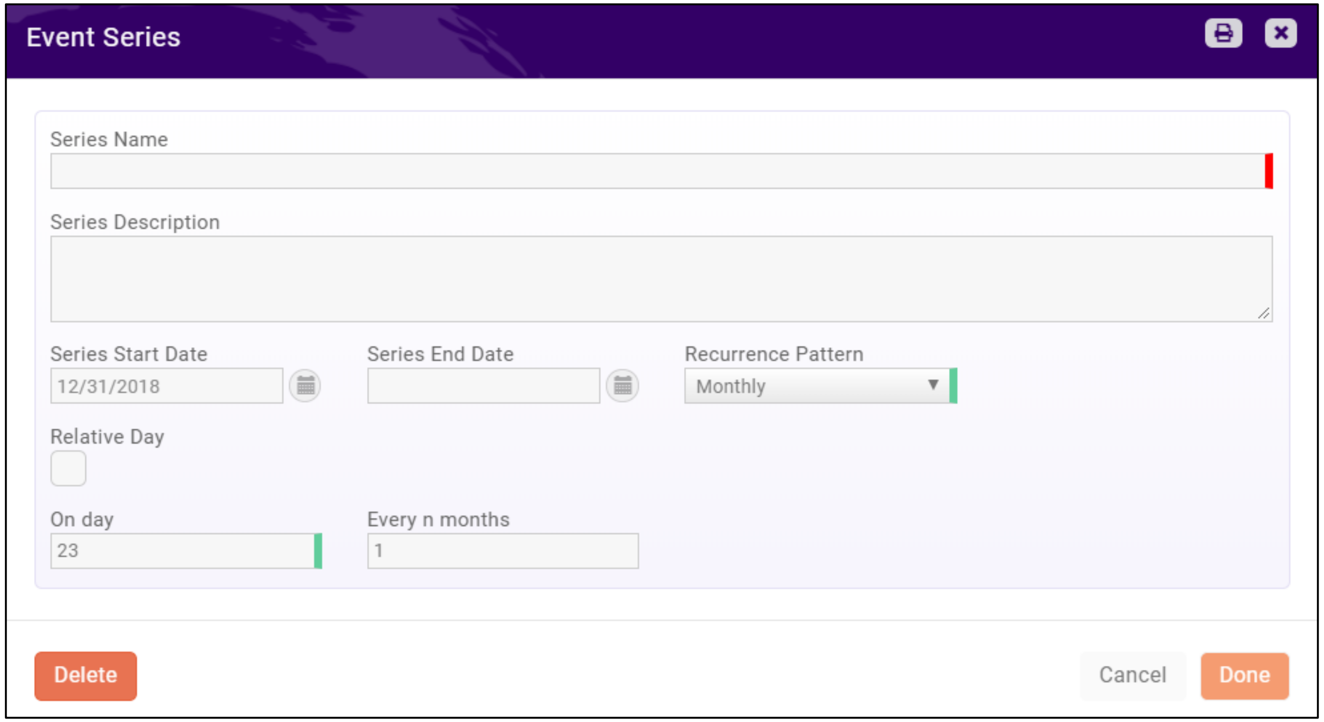
WIKI: [Copy an Existing Event]



Setup a Recurring Event

If your association has an event which occurs on a regular basis, save time by setting it up as a recurring event

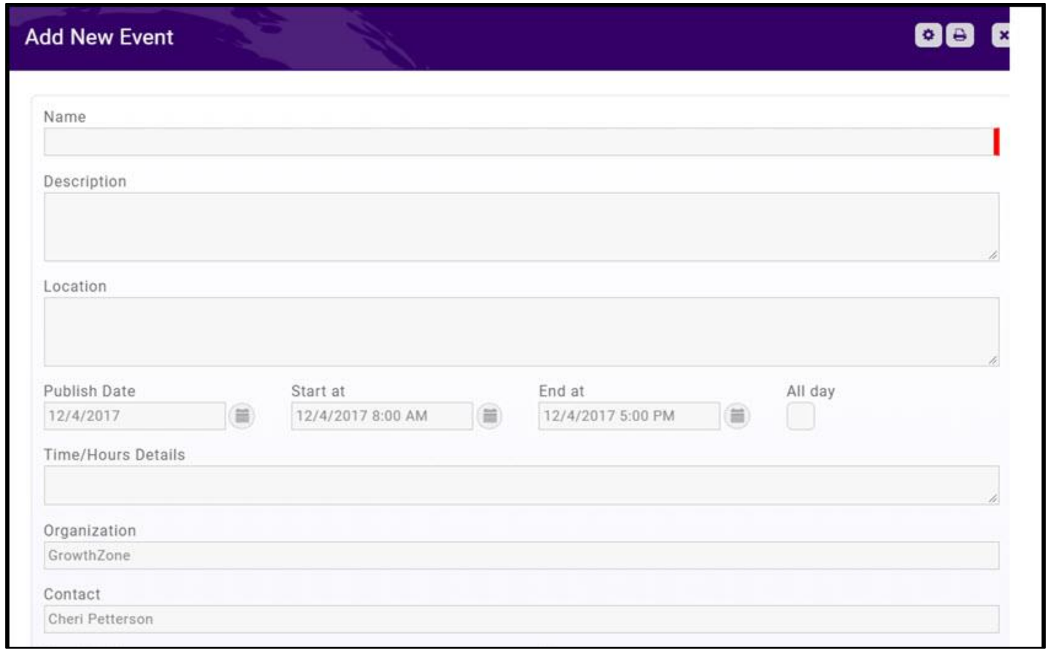
WIKI: Set up a Recurring Event



Add a New Event

You may add a new event by clicking the **Quick Actions** button in the header bar, or by clicking the **Add Event** button on the Events page.

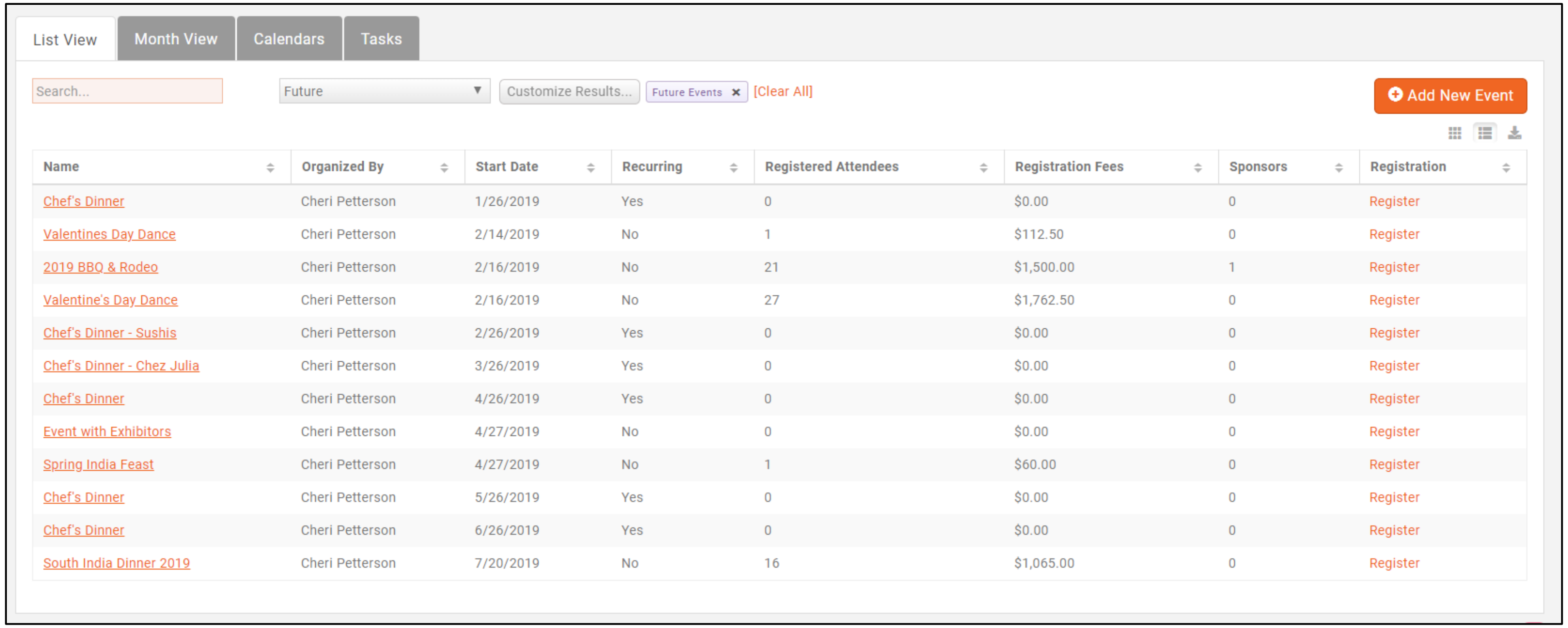
WIKI: Add a New Event



View/Edit Event Details

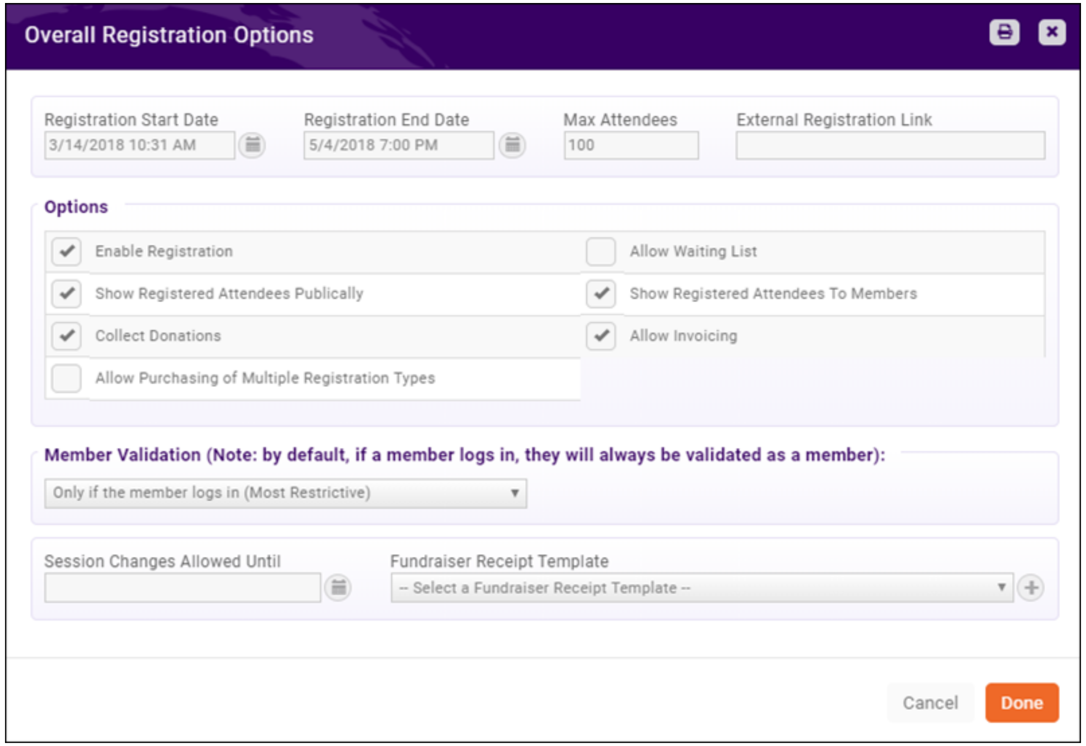
You may view your events, by selecting Events in the Navigation Panel OR you may type the event name in the Search box in the header bar.

WIKI: [Edit Event Details]



Registration Options

Your event registration form, fees, discounts, and so on, are setup on an Event's **Attendee Setup** tab

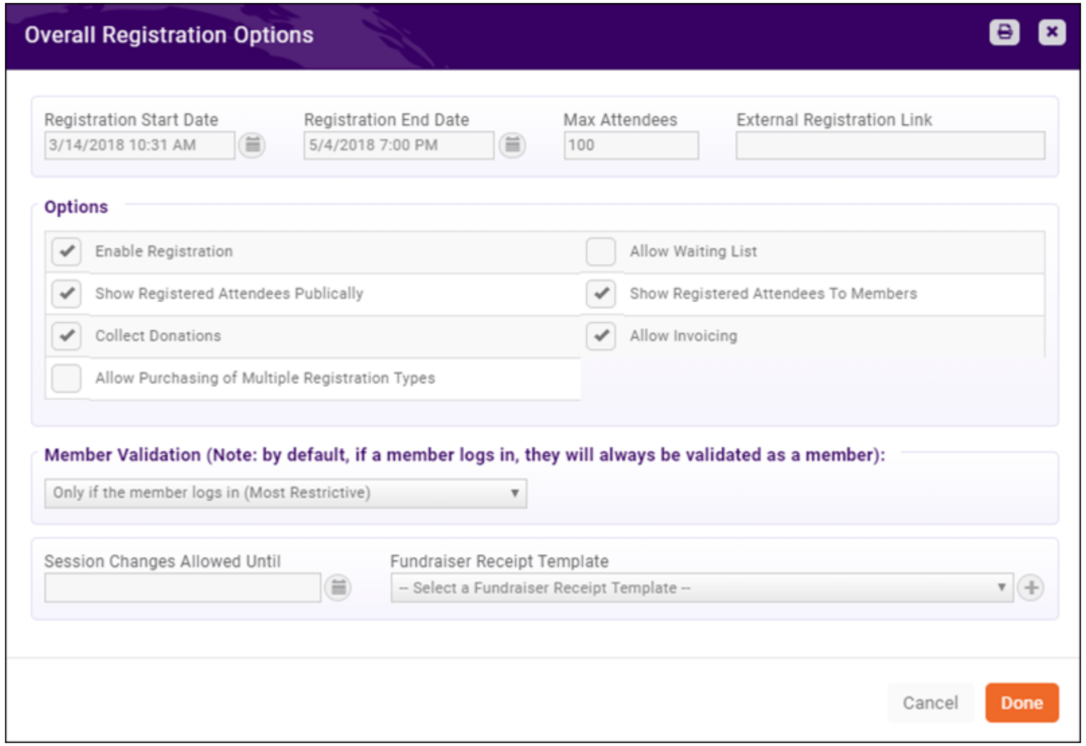


Registration Options

Registration Options

You can configure: your registration open/end dates, maximum attendees, visibility, and so on under the **Overall Registration Options**.

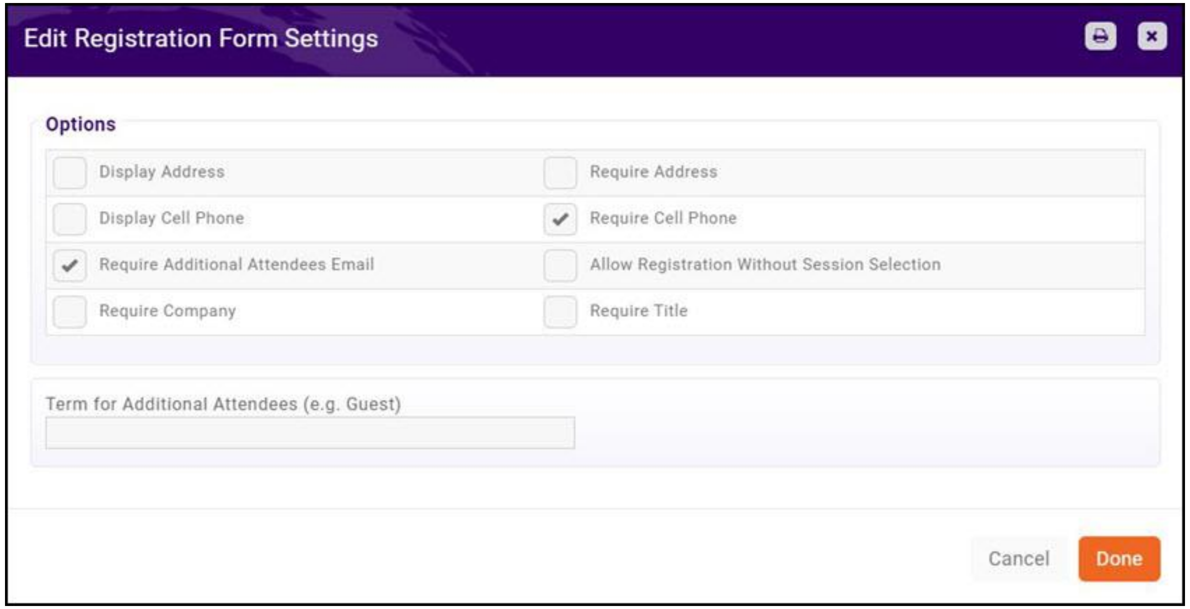
WIKI: Setup Overall Registration Options



Registration Form

By default, the registration form for an event will require name and email address (organization will be included on the form, but is not required). You may configure the fields you wish to require on the registration form

WIKI: Registration Form Settings



Event Custom Fields

You can easily create custom fields to add to the Event Registration form. For Example, if you are offering meal choices for your annual banquet, you can gather this information from registrants via custom fields.

WIKI: Event Custom Fields

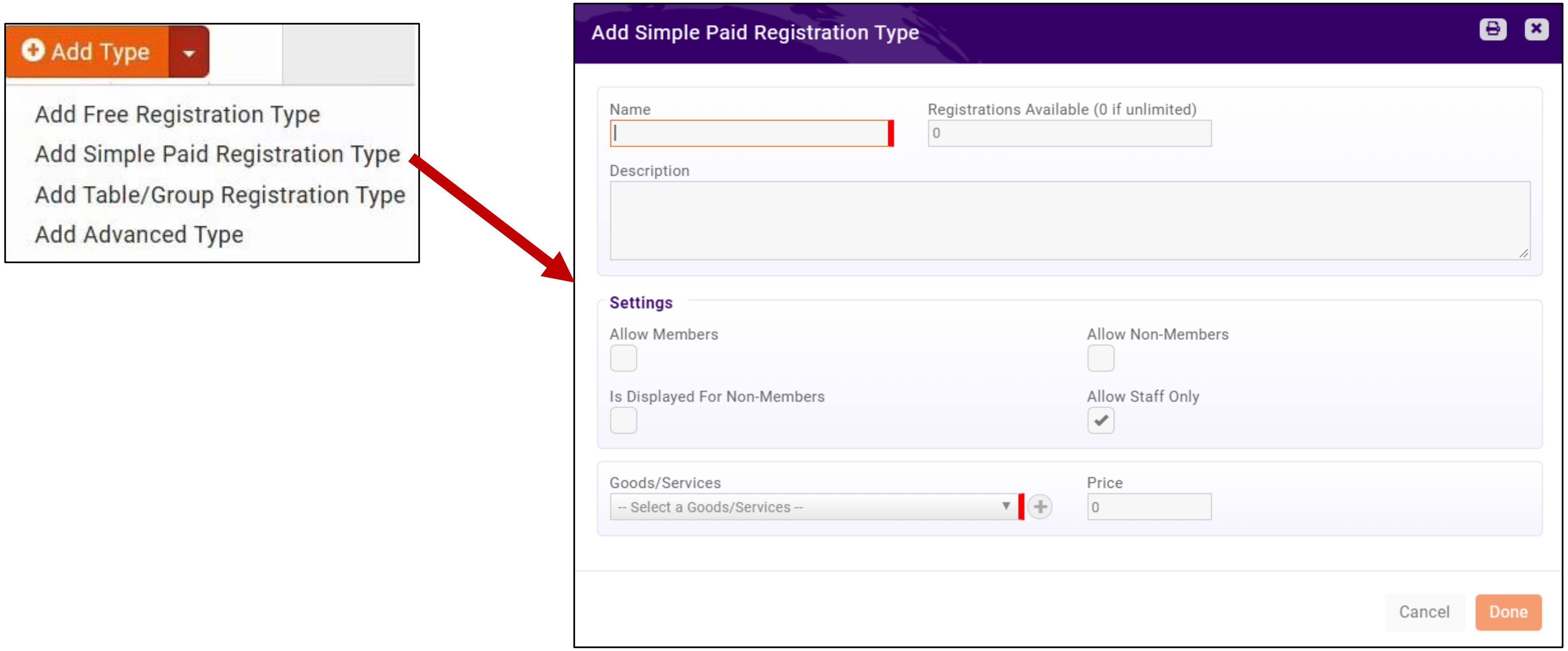
Custom Fields

Object Type	Display Name	Field Data Type	Group Name	Archived	Actions
Event Registration	Dietary Restrictions	Text		No	
Event Registration	Meal Choice	Dropdown		No	
Event Registration	Table Name	Text		No	
Event Registration	Seat Number	Text		No	

Event Registration Fees

The registration fees for your event are configured in the **Registration Types** section of the **Attendee Setup** tab.

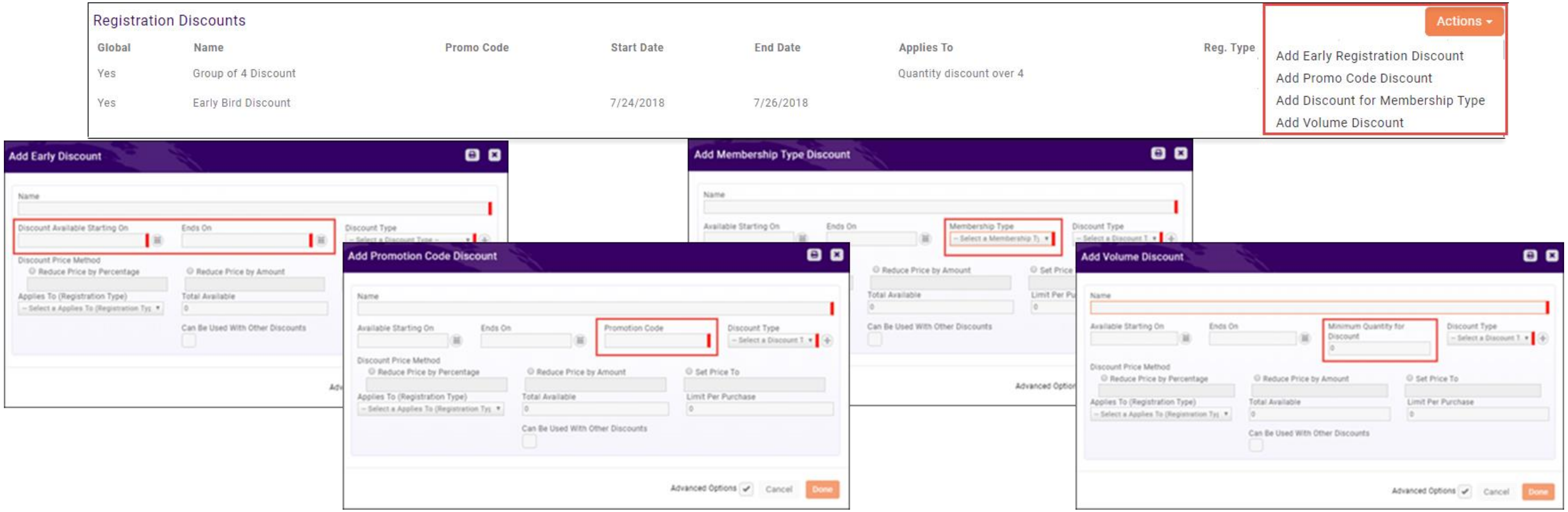
WIKI: Event Fees-Registration



Event Fees—Discounts

Any event may have special discounts (based on early registration, promo code, or membership type, or volume) available and applied to all or selected fees.

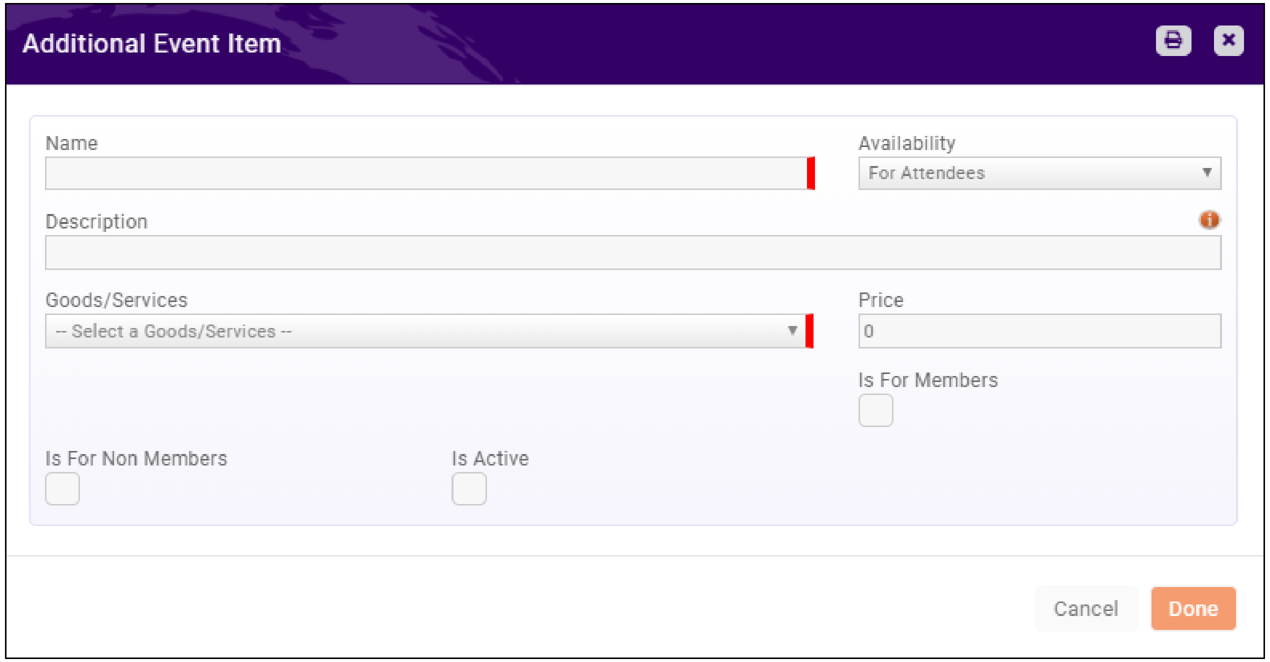
WIKI: Event Fees--Discounts



Event Fees—Additional Items

If you wish to sell additional items during the event registration process these items may be added in the **Additional Items** section on the **Attendee Setup** tab

WIKI: Event Fees--Additional Items



Registration Messages

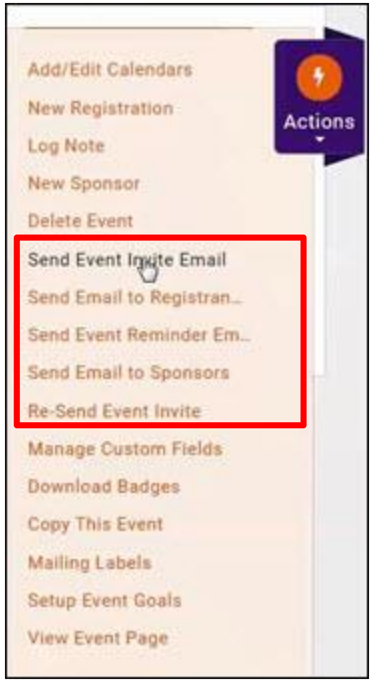
On the Event **Attendee Setup** page, you can customize the instructions displayed on your registration page and the confirmation email displayed in the browser after event registration is completed.

WIKI: Registration Messages

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.

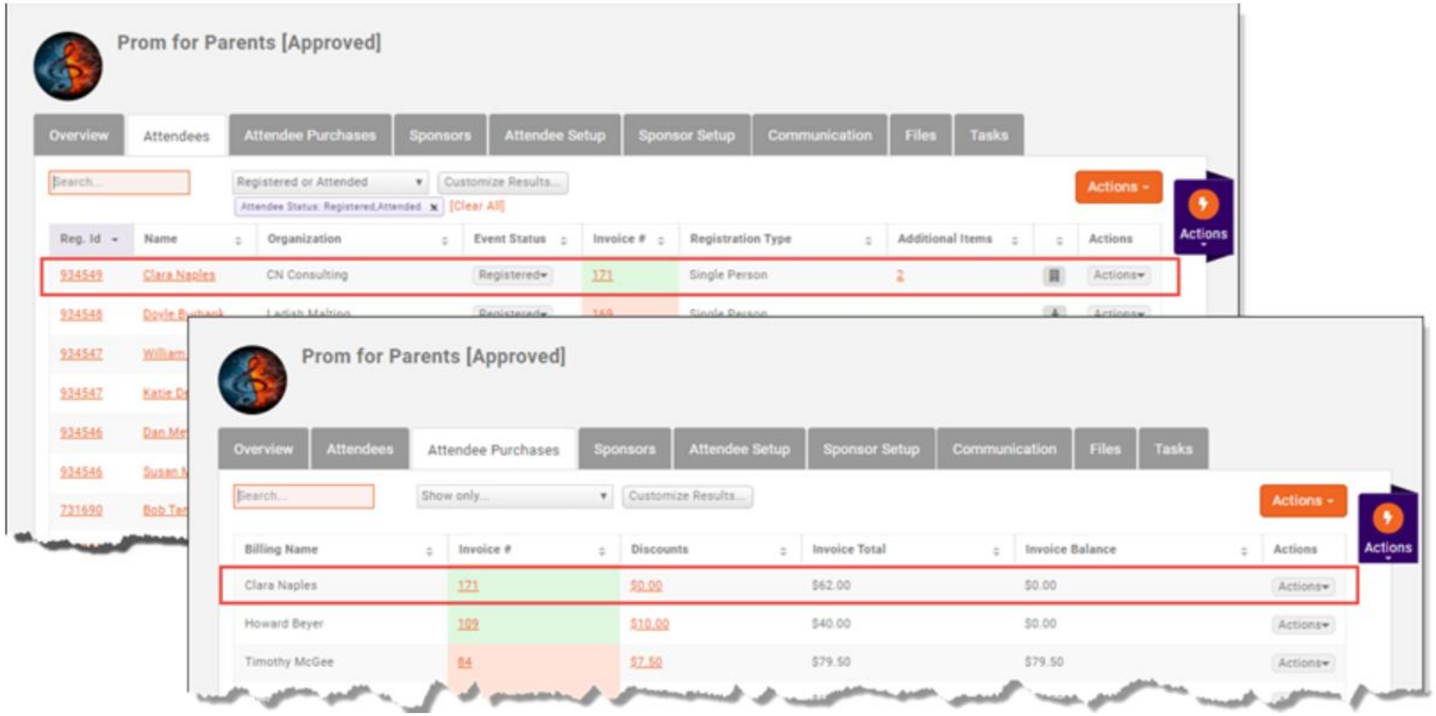
WIKI: Event Communications



Managing Registrations/Attendees

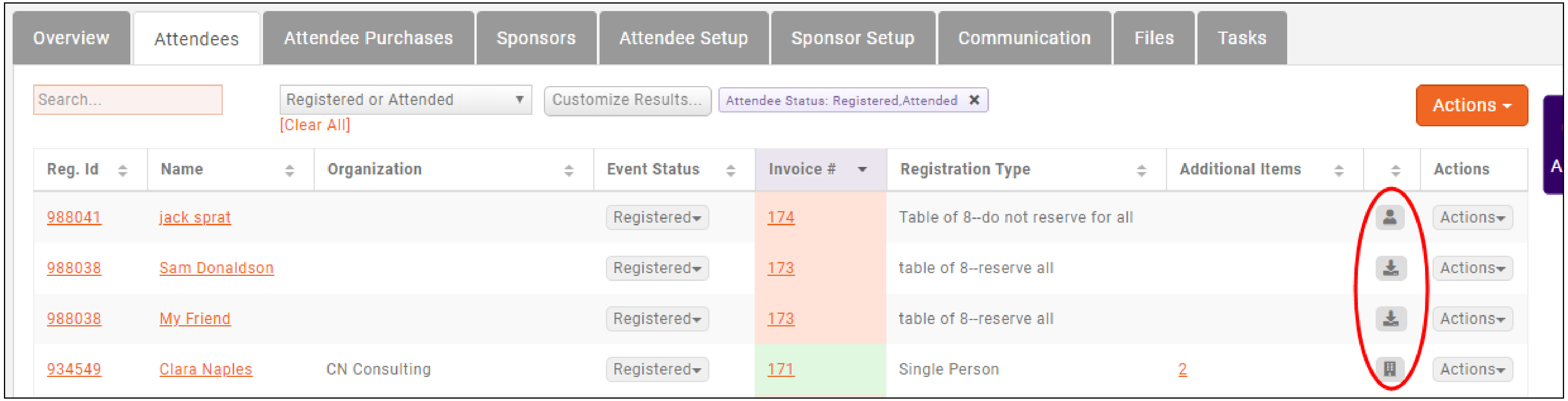
Technically, an event registration consists of attendee information and financial information related to the registration.

[WIKI: Managing Registrations/Attendees]()



Matching Registrants to Contacts

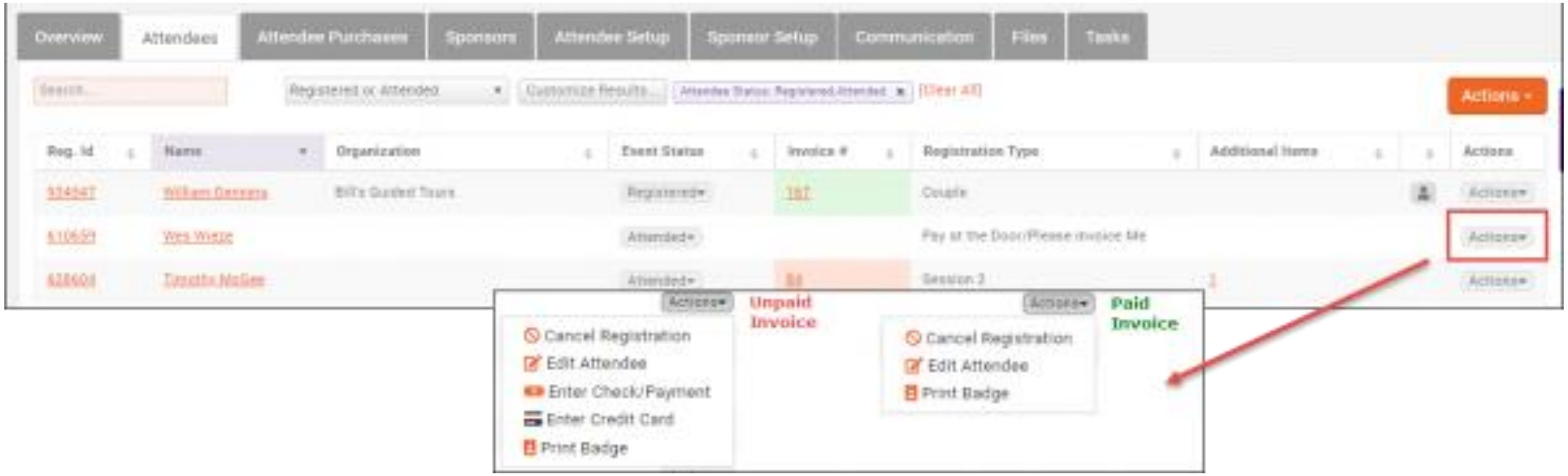
Between the **Additional Items** and the **Actions** columns there is an unnamed column that *may* contain an icon for some registrants. If there **IS** an icon, it means something about the registration doesn't match the data in the system. WIKI: Matching Registrants to Contacts



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.

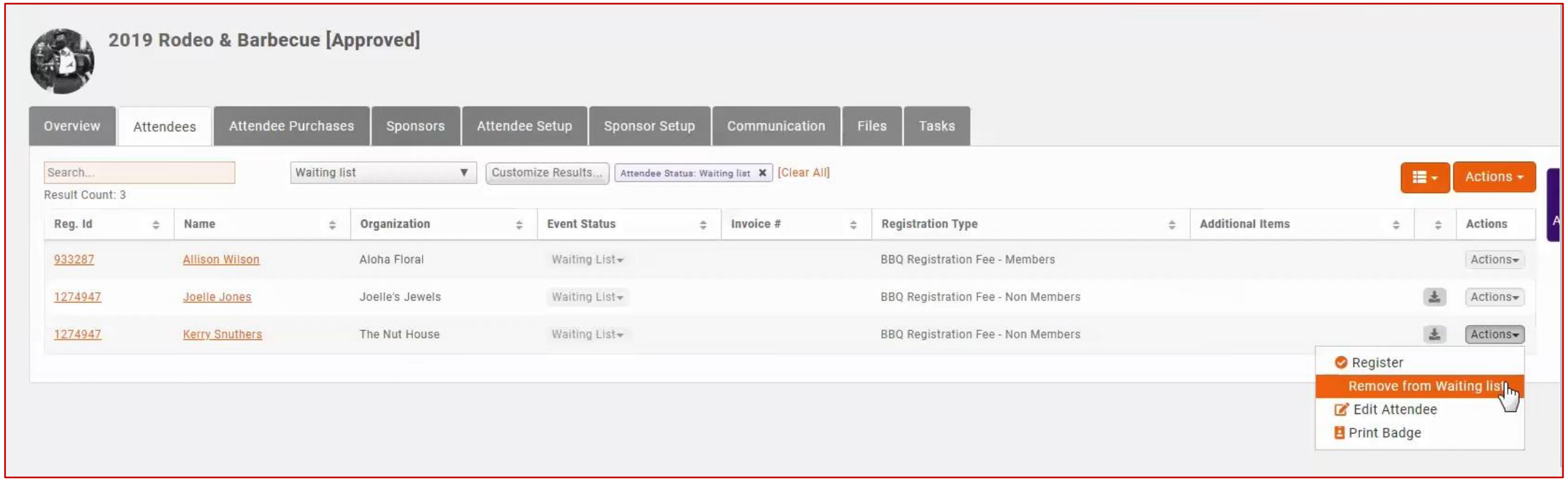
WIKI: [Cancelling a Registration]



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.

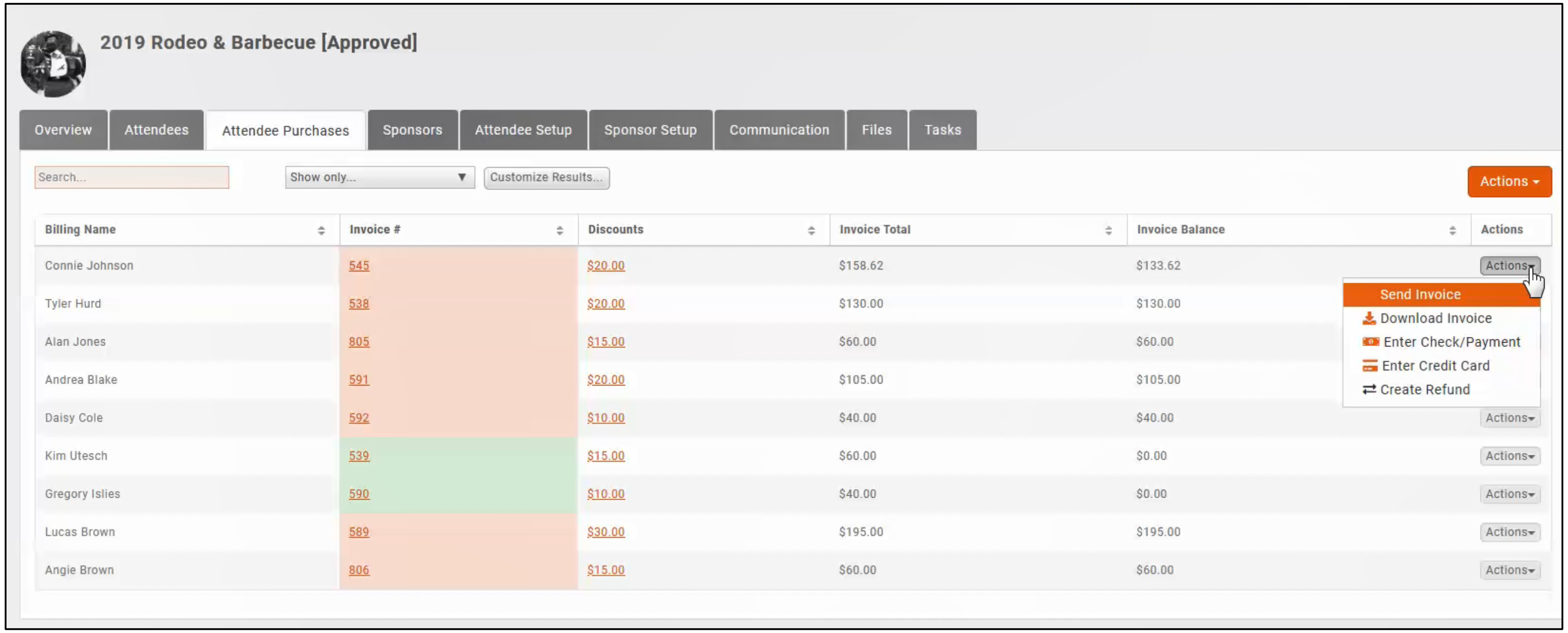
WIKI: [Managing the Waiting List]()



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.

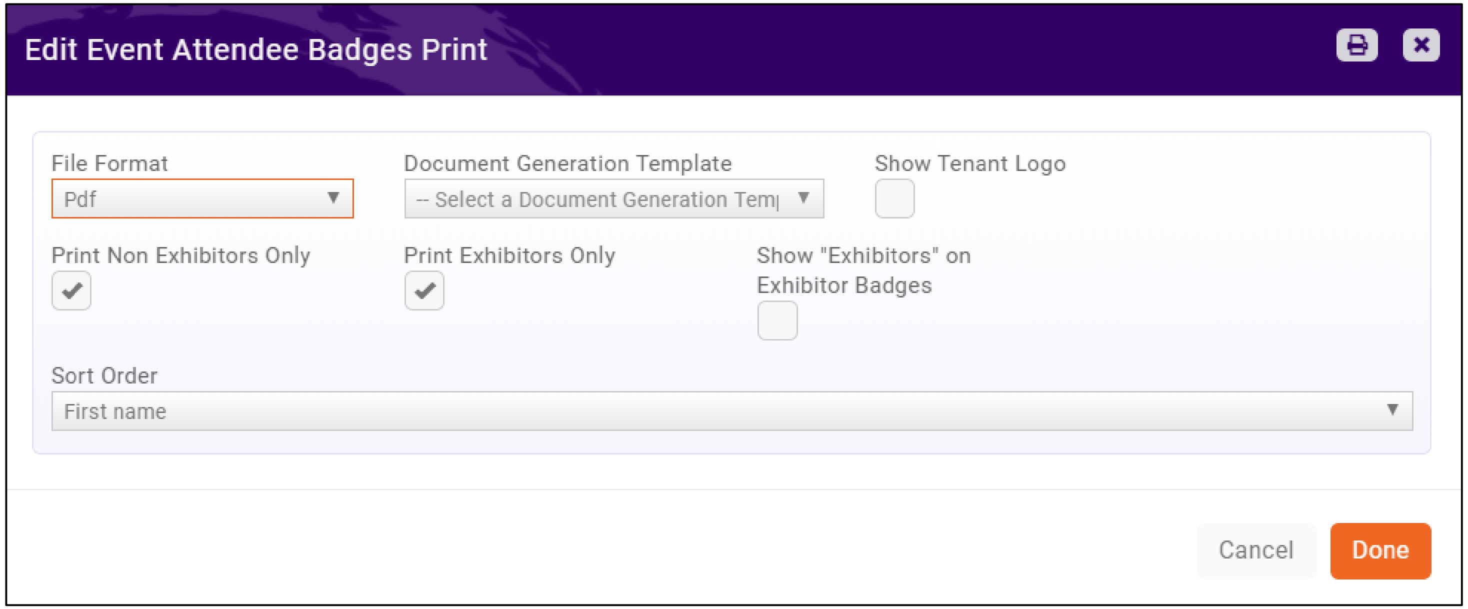
WIKI: [Event Payments & Invoices]



Download Badges

You can easily download badges for your event, and a variety of Avery Style templates are available

WIKI: Download Name Badges

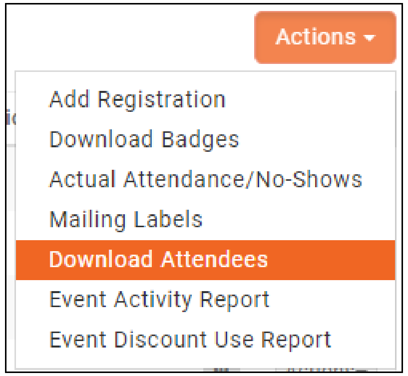


Managing Attendance

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

WIKI: Check-in Roster



Checking in Attendees

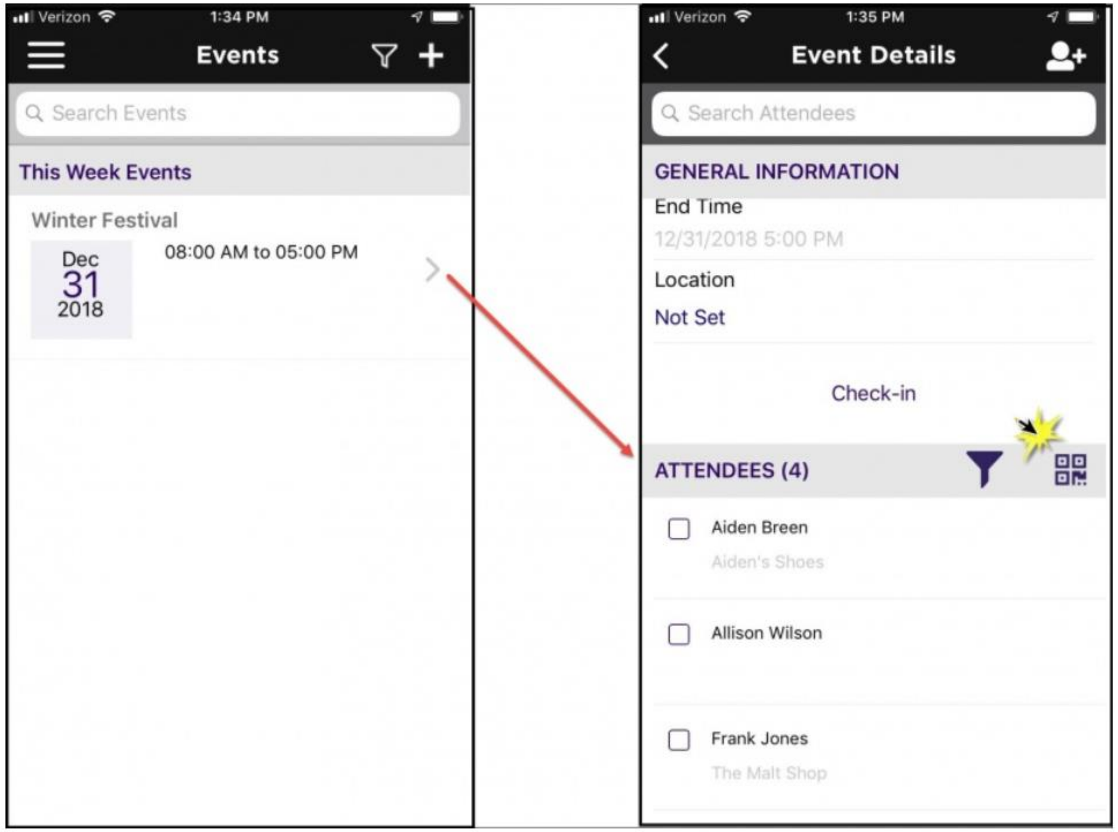
You may check-in your attendees in several ways:

- WIKI: From the Guest List
- WIKI: From the Actions on the Attendees Tab
- WIKI: Using the Staff App

Checking in Attendees

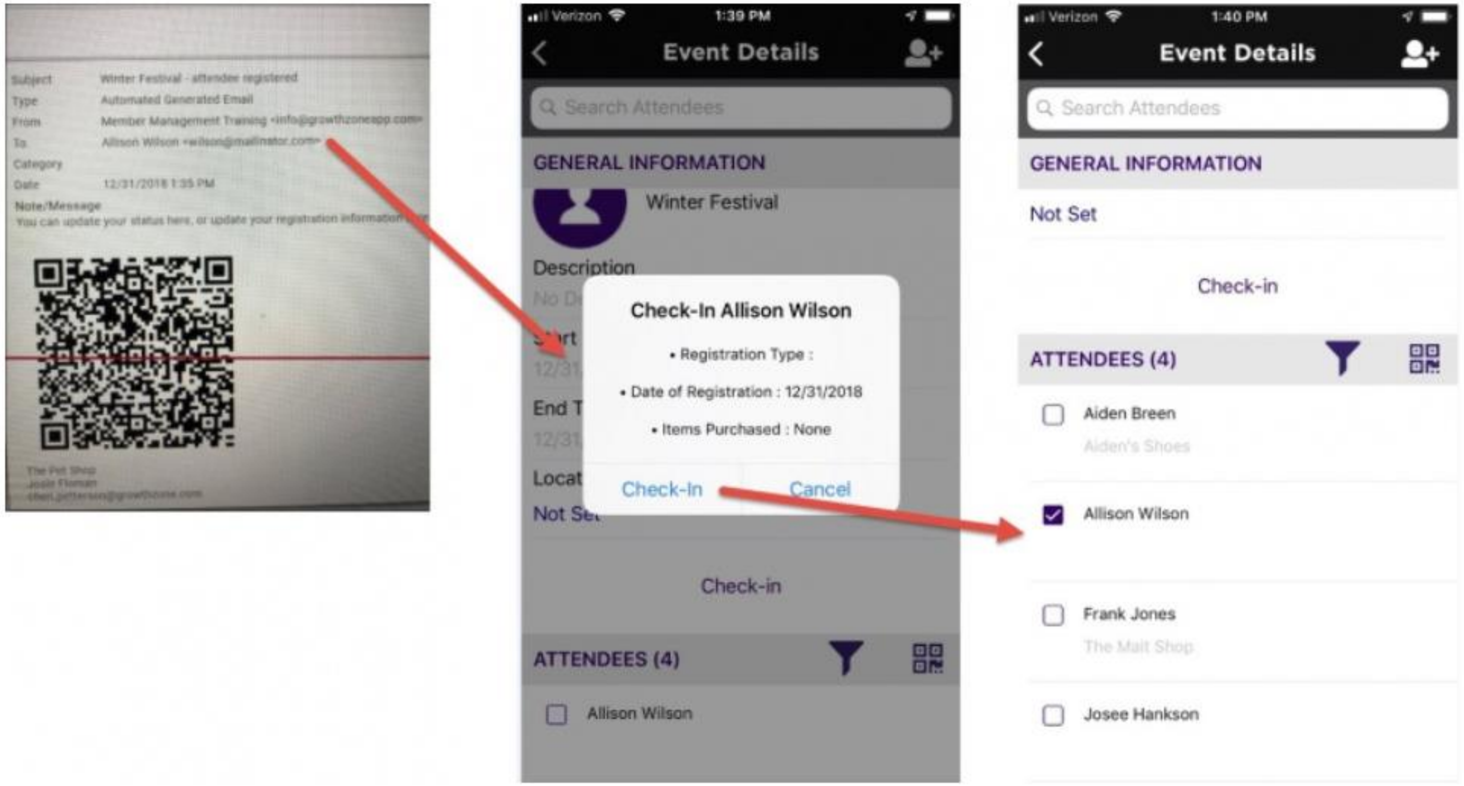
Using the Staff App to Check-in Event Attendees

- WIKI: [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)

WIKI: Event Reporting

Questions??