

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

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](#)

Back to Setup

Event Settings

Payment Gateway: IPP Event Gateway

Invoice Line Item Description Option: Event name and attendee name and reg type and saleable item

Display Registration Descriptions by Default:

Confirmation HTML for Event Attendee Registration

Type something

Confirmation HTML for Event Sponsor Registration

Type something

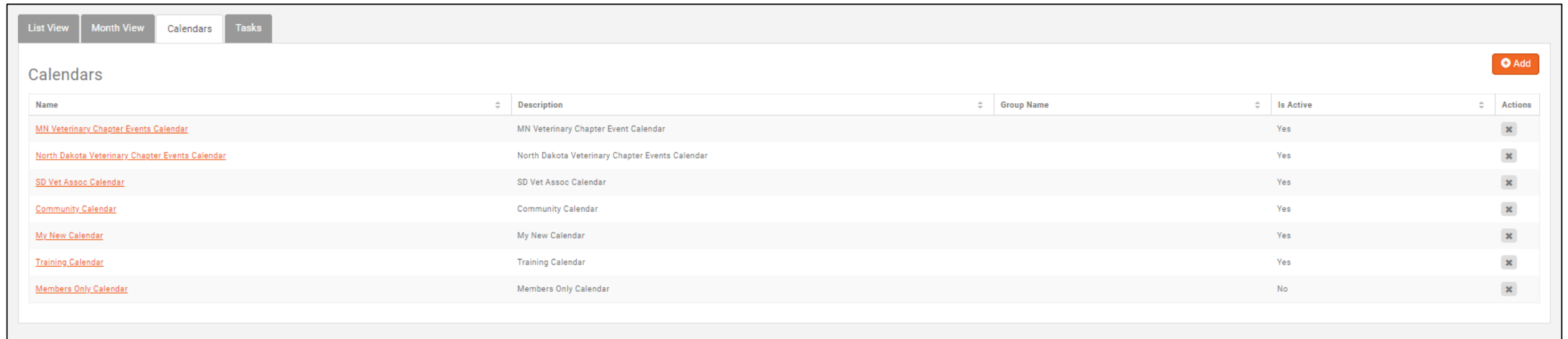
Max Event Invited Attendees to Store: 100

Save

Event Calendars

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

[WIKI: Event Calendars](#)



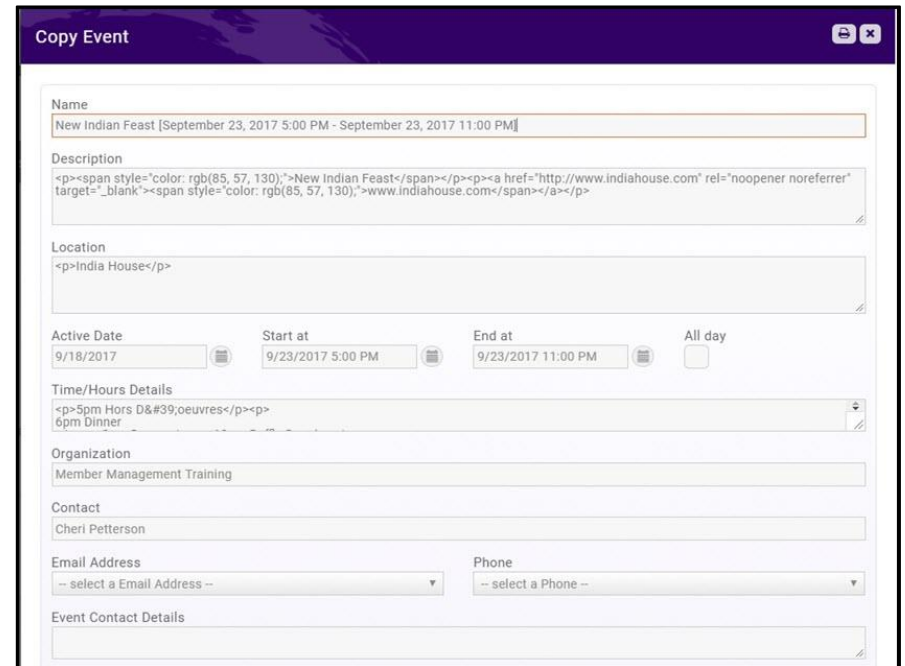
The screenshot shows a web interface for managing calendars. At the top, there are four tabs: 'List View', 'Month View', 'Calendars', and 'Tasks'. The 'Calendars' tab is selected. Below the tabs, there is a header 'Calendars' and an 'Add' button. A table lists several calendars with columns for Name, Description, Group Name, Is Active, and Actions.

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](#)



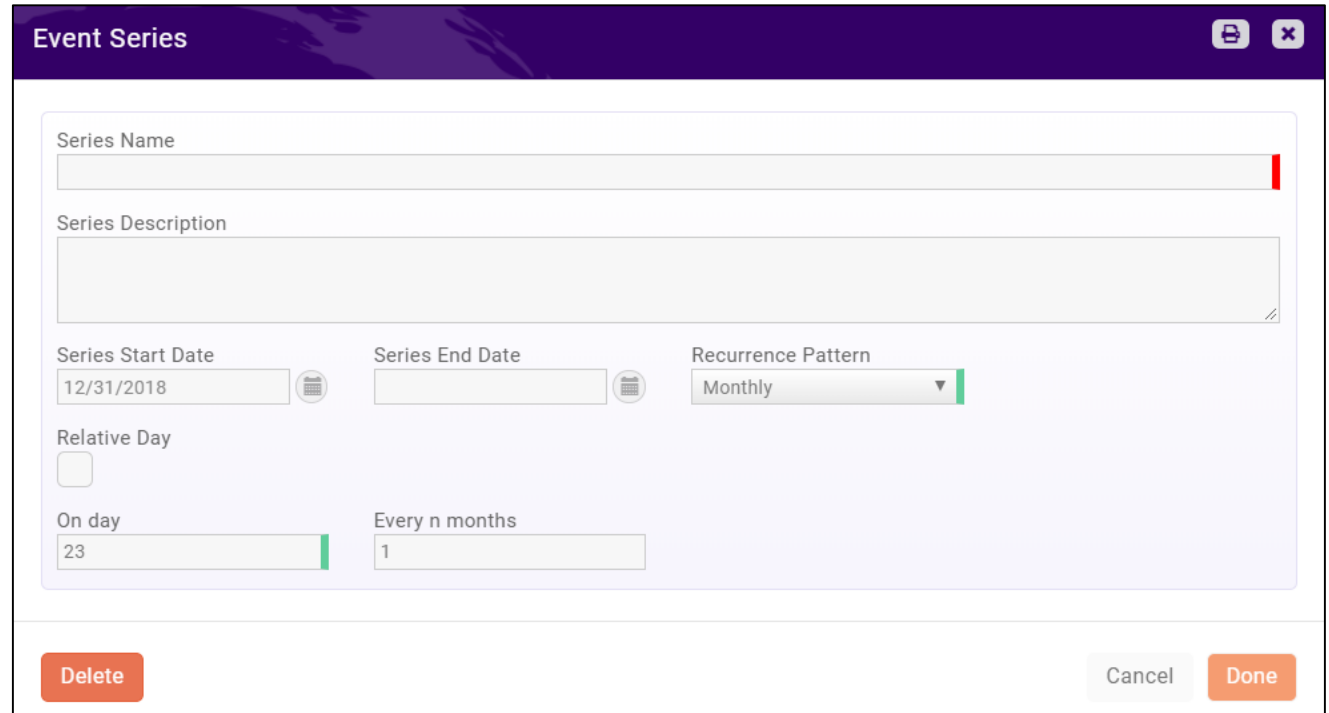
The screenshot shows a web form titled "Copy Event" with a purple header. The form contains several sections for event details:

- Name:** A text input field containing "New Indian Feast [September 23, 2017 5:00 PM - September 23, 2017 11:00 PM]".
- Description:** A rich text editor containing HTML code: `<p>New Indian Feast</p><p>www.indiahouse.com</p>`
- Location:** A text input field containing "`<p>India House</p>`".
- Active Date:** A date picker set to "9/18/2017".
- Start at:** A time picker set to "9/23/2017 5:00 PM".
- End at:** A time picker set to "9/23/2017 11:00 PM".
- All day:** An unchecked checkbox.
- Time/Hours Details:** A text input field containing "`<p>5pm Hors D'oeuvres</p><p>6pm Dinner</p>`".
- Organization:** A text input field containing "Member Management Training".
- Contact:** A text input field containing "Cheri Petterson".
- Email Address:** A dropdown menu with "-- select a Email Address --".
- Phone:** A dropdown menu with "-- select a Phone --".
- Event Contact Details:** An empty text input field.

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](#)



The screenshot shows the 'Event Series' form in the GrowthZone software. The form is titled 'Event Series' and has a dark purple header bar with a close button (X) and a refresh button (circular arrow). The form contains the following fields and controls:

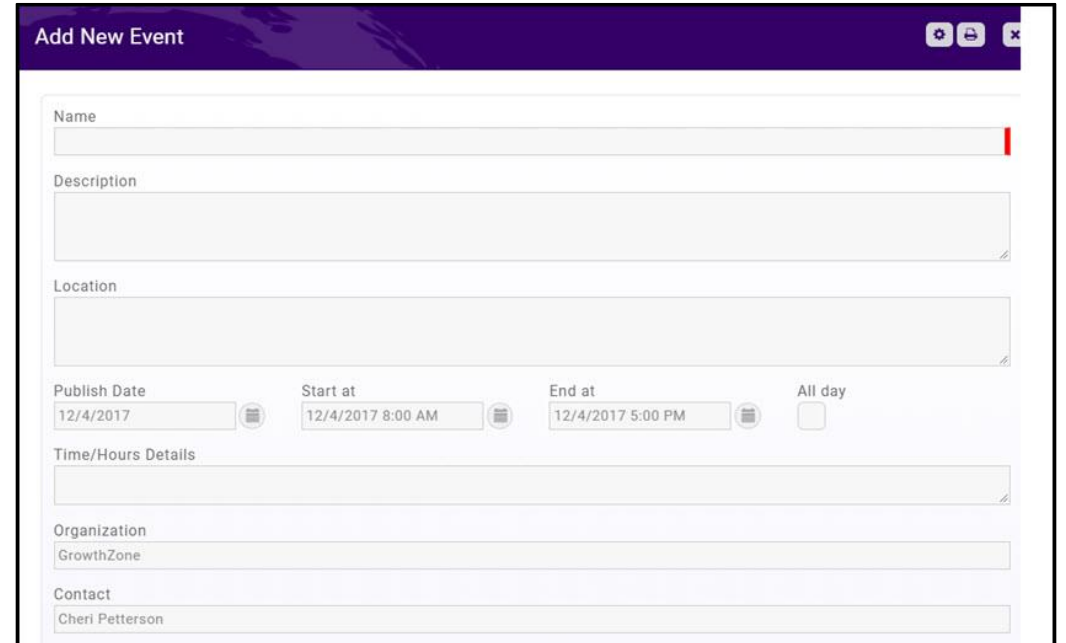
- Series Name:** A text input field.
- Series Description:** A large text area for entering details.
- Series Start Date:** A date picker showing '12/31/2018' with a calendar icon.
- Series End Date:** A date picker with a calendar icon.
- Recurrence Pattern:** A dropdown menu currently set to 'Monthly'.
- Relative Day:** A checkbox that is currently unchecked.
- On day:** A text input field containing '23'.
- Every n months:** A text input field containing '1'.

At the bottom of the form, there are three buttons: 'Delete' (orange), 'Cancel' (grey), and 'Done' (orange).

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](#)



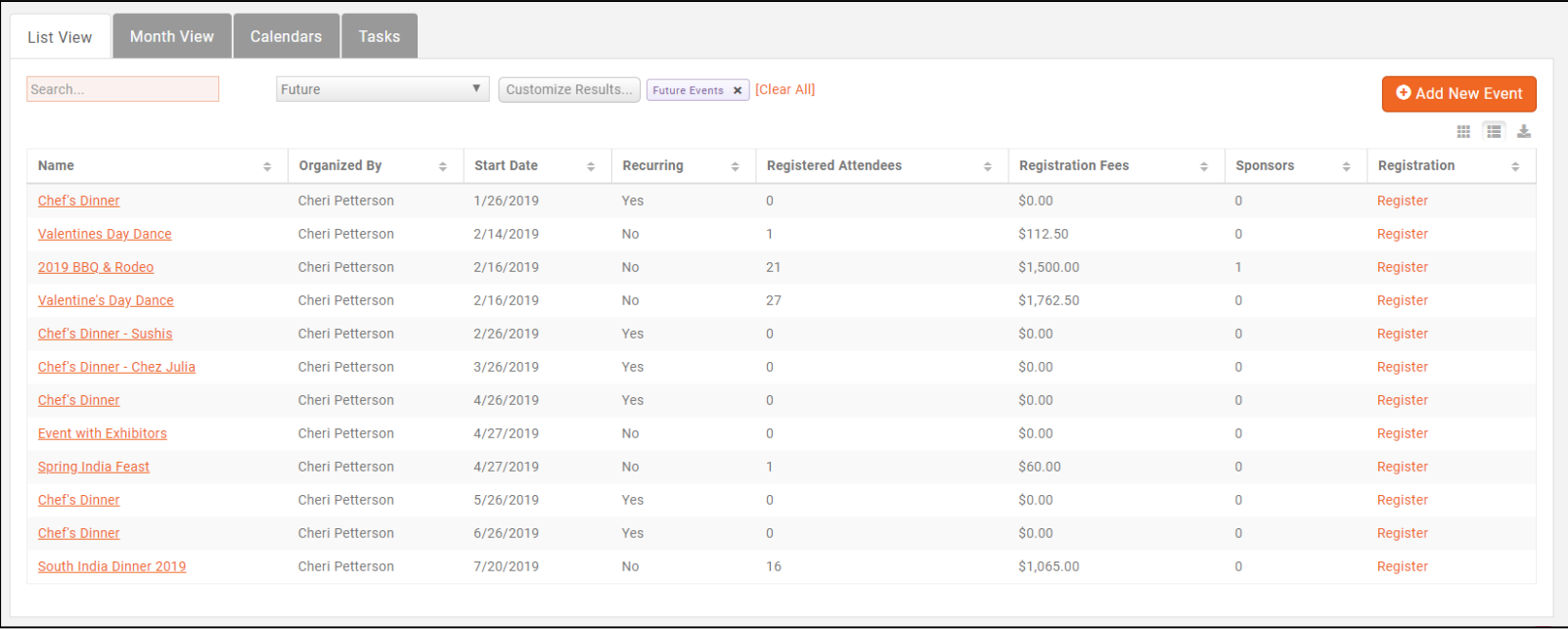
The screenshot shows a web form titled "Add New Event" with a purple header bar. The form contains the following fields and controls:

- Name:** A text input field.
- Description:** A large text area.
- Location:** A text input field.
- Publish Date:** A date picker showing "12/4/2017".
- Start at:** A time picker showing "12/4/2017 8:00 AM".
- End at:** A time picker showing "12/4/2017 5:00 PM".
- All day:** An unchecked checkbox.
- Time/Hours Details:** A text input field.
- Organization:** A dropdown menu with "GrowthZone" selected.
- Contact:** A text input field with "Cheri Petterson" entered.

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](#)

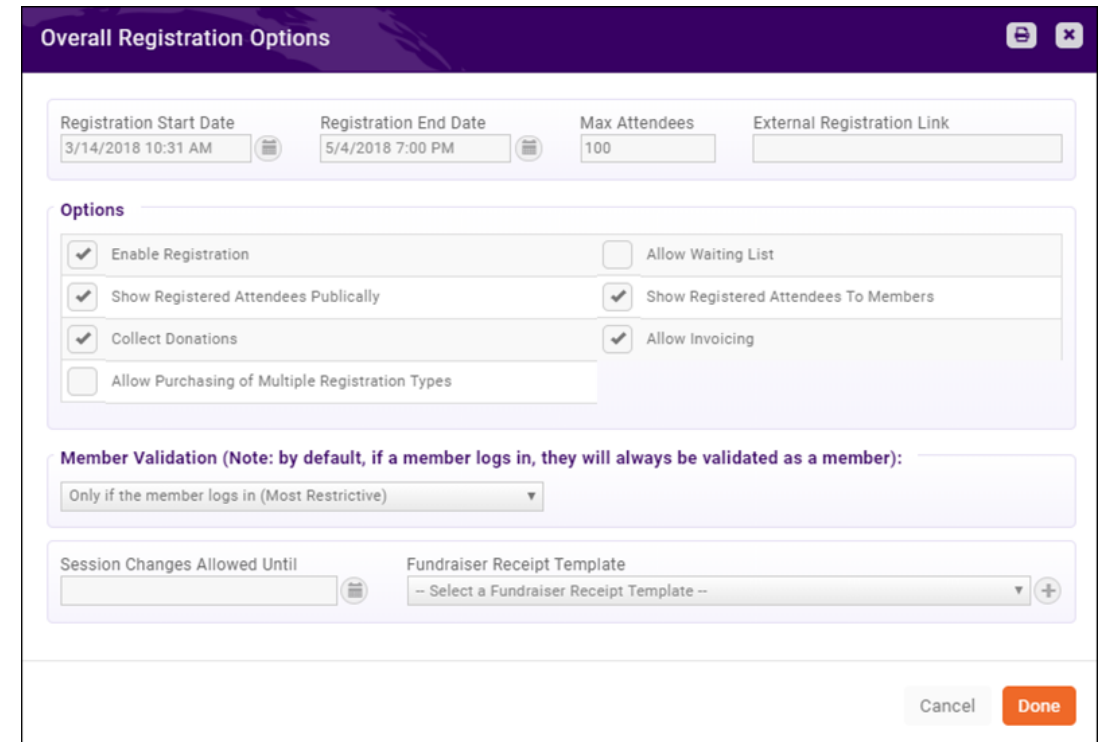


The screenshot shows the 'Events' page in the GrowthZone software. At the top, there are navigation tabs for 'List View', 'Month View', 'Calendars', and 'Tasks'. Below these is a search bar with the text 'Search...' and a dropdown menu set to 'Future'. To the right of the search bar are buttons for 'Customize Results...', 'Future Events', and '[Clear All]'. An orange button labeled 'Add New Event' is located in the top right corner. The main content is a table with the following columns: Name, Organized By, Start Date, Recurring, Registered Attendees, Registration Fees, Sponsors, and Registration. The table lists 11 events, all organized by Cheri Petterson, with various start dates and registration fees.

Name	Organized By	Start Date	Recurring	Registered Attendees	Registration Fees	Sponsors	Registration
Chef's Dinner	Cheri Petterson	1/26/2019	Yes	0	\$0.00	0	Register
Valentines Day Dance	Cheri Petterson	2/14/2019	No	1	\$112.50	0	Register
2019 BBO & Rodeo	Cheri Petterson	2/16/2019	No	21	\$1,500.00	1	Register
Valentine's Day Dance	Cheri Petterson	2/16/2019	No	27	\$1,762.50	0	Register
Chef's Dinner - Sushis	Cheri Petterson	2/26/2019	Yes	0	\$0.00	0	Register
Chef's Dinner - Chez Julia	Cheri Petterson	3/26/2019	Yes	0	\$0.00	0	Register
Chef's Dinner	Cheri Petterson	4/26/2019	Yes	0	\$0.00	0	Register
Event with Exhibitors	Cheri Petterson	4/27/2019	No	0	\$0.00	0	Register
Spring India Feast	Cheri Petterson	4/27/2019	No	1	\$60.00	0	Register
Chef's Dinner	Cheri Petterson	5/26/2019	Yes	0	\$0.00	0	Register
Chef's Dinner	Cheri Petterson	6/26/2019	Yes	0	\$0.00	0	Register
South India Dinner 2019	Cheri Petterson	7/20/2019	No	16	\$1,065.00	0	Register

Registration Options

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



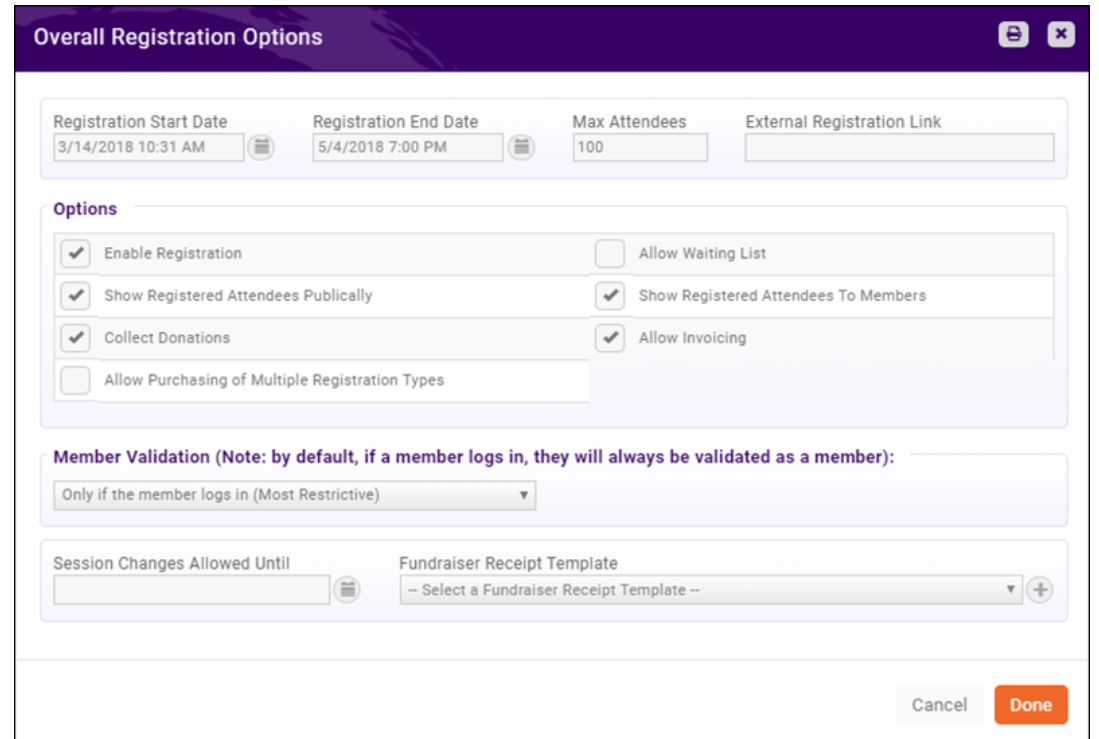
The screenshot shows a dialog box titled "Overall Registration Options" with a purple header. It contains several input fields and checkboxes. At the top, there are four fields: "Registration Start Date" (3/14/2018 10:31 AM), "Registration End Date" (5/4/2018 7:00 PM), "Max Attendees" (100), and "External Registration Link". Below these is an "Options" section with checkboxes for "Enable Registration" (checked), "Allow Waiting List" (unchecked), "Show Registered Attendees Publically" (checked), "Show Registered Attendees To Members" (checked), "Collect Donations" (checked), "Allow Invoicing" (checked), and "Allow Purchasing of Multiple Registration Types" (unchecked). A "Member Validation" section has a note and a dropdown menu set to "Only if the member logs in (Most Restrictive)". At the bottom, there are fields for "Session Changes Allowed Until" and "Fundraiser Receipt Template" (set to "-- Select a Fundraiser Receipt Template --"). The dialog has "Cancel" and "Done" buttons at the bottom right.

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](#)



The screenshot shows the "Overall Registration Options" configuration window. It includes the following fields and options:

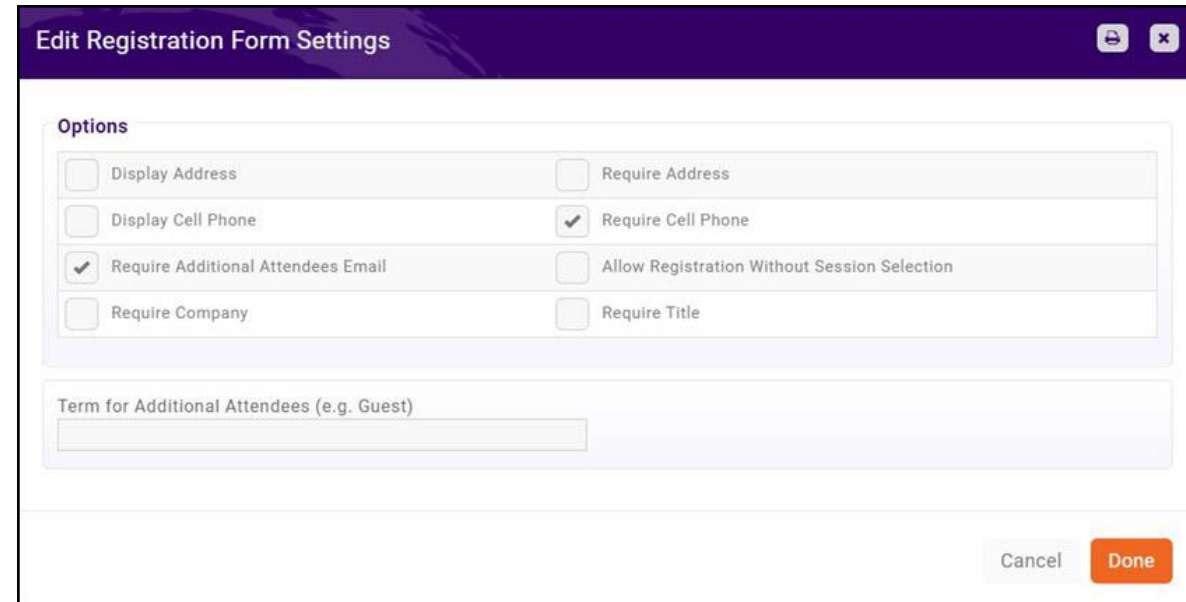
- Registration Start Date:** 3/14/2018 10:31 AM
- Registration End Date:** 5/4/2018 7:00 PM
- Max Attendees:** 100
- External Registration Link:** (empty text field)
- Options:**
 - Enable Registration
 - Allow Waiting List
 - Show Registered Attendees Publically
 - Show Registered Attendees To Members
 - Collect Donations
 - Allow Invoicing
 - 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 text field)
- Fundraiser Receipt Template:** -- Select a Fundraiser Receipt Template --

Buttons: Cancel, Done

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](#)




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)

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

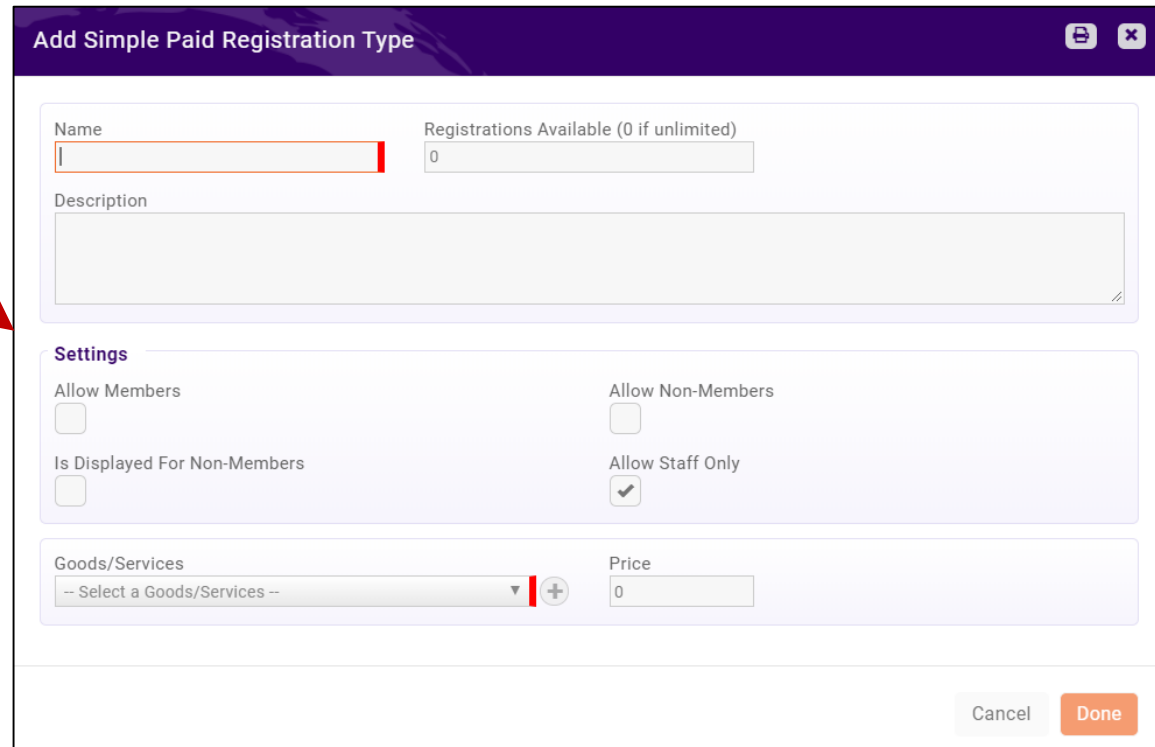
The registration fees for your event are configured in the **Registration Types** section of the **Attendee Setup** tab.

WIKI: [Event Fees-Registration](#)



+ Add Type

- Add Free Registration Type
- Add Simple Paid Registration Type
- Add Table/Group Registration Type
- Add Advanced Type



Add Simple Paid Registration Type

Name Registrations Available (0 if unlimited)

Description

Settings

Allow Members Allow Non-Members

Is Displayed For Non-Members Allow Staff Only

Goods/Services Price

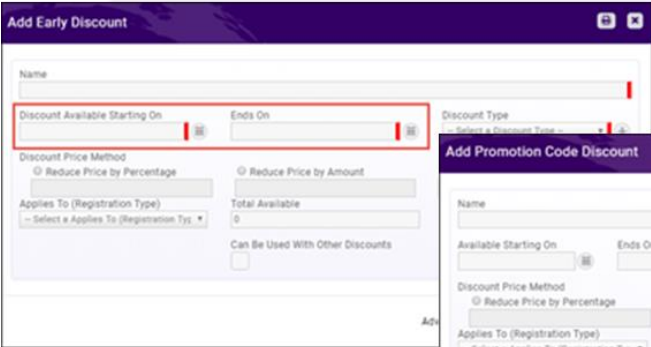
Cancel Done

Event Fees—Discounts

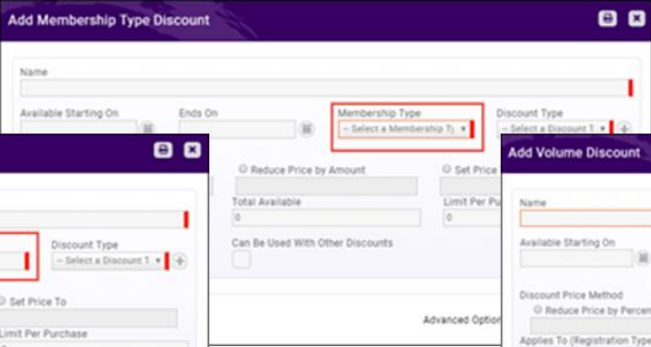
Any event may have special discounts (based on early registration, promo code, or membership type, or volume) available and applied to all or selected fees.

WIKI: [Event Fees--Discounts](#)

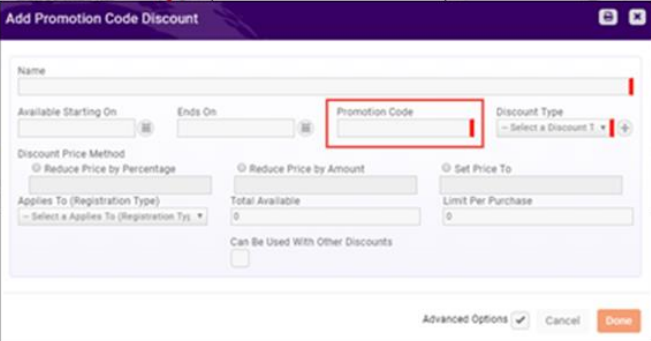
Global	Name	Promo Code	Start Date	End Date	Applies To	Reg. Type	Actions
Yes	Group of 4 Discount				Quantity discount over 4		Add Early Registration Discount Add Promo Code Discount Add Discount for Membership Type Add Volume Discount
Yes	Early Bird Discount		7/24/2018	7/26/2018			



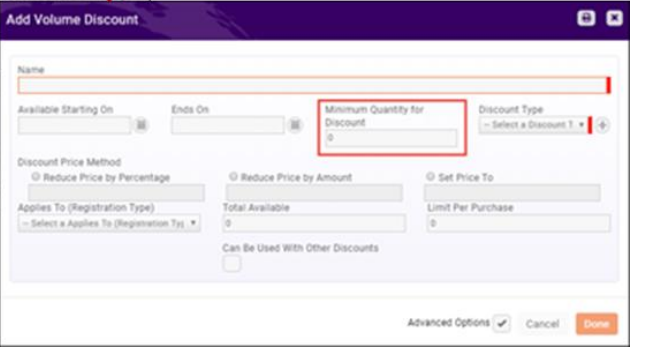
The 'Add Early Discount' dialog box shows fields for Name, Discount Available Starting On, Ends On, and Discount Type. The 'Discount Available Starting On' and 'Ends On' fields are highlighted with a red box. Below these are radio buttons for 'Reduce Price by Percentage' and 'Reduce Price by Amount', and a dropdown for 'Applies To (Registration Type)'. There is also a 'Total Available' field and a 'Can Be Used With Other Discounts' checkbox.



The 'Add Membership Type Discount' dialog box shows fields for Name, Available Starting On, Ends On, and Membership Type. The 'Membership Type' dropdown is highlighted with a red box. Below are radio buttons for 'Reduce Price by Amount' and 'Set Price', and a 'Total Available' field. There is also a 'Limit Per Purchase' field and a 'Can Be Used With Other Discounts' checkbox.



The 'Add Promotion Code Discount' dialog box shows fields for Name, Available Starting On, Ends On, and Promotion Code. The 'Promotion Code' field is highlighted with a red box. Below are radio buttons for 'Reduce Price by Percentage' and 'Reduce Price by Amount', and a dropdown for 'Applies To (Registration Type)'. There is also a 'Total Available' field, a 'Limit Per Purchase' field, and a 'Can Be Used With Other Discounts' checkbox. At the bottom, there are 'Advanced Options', 'Cancel', and 'Done' buttons.

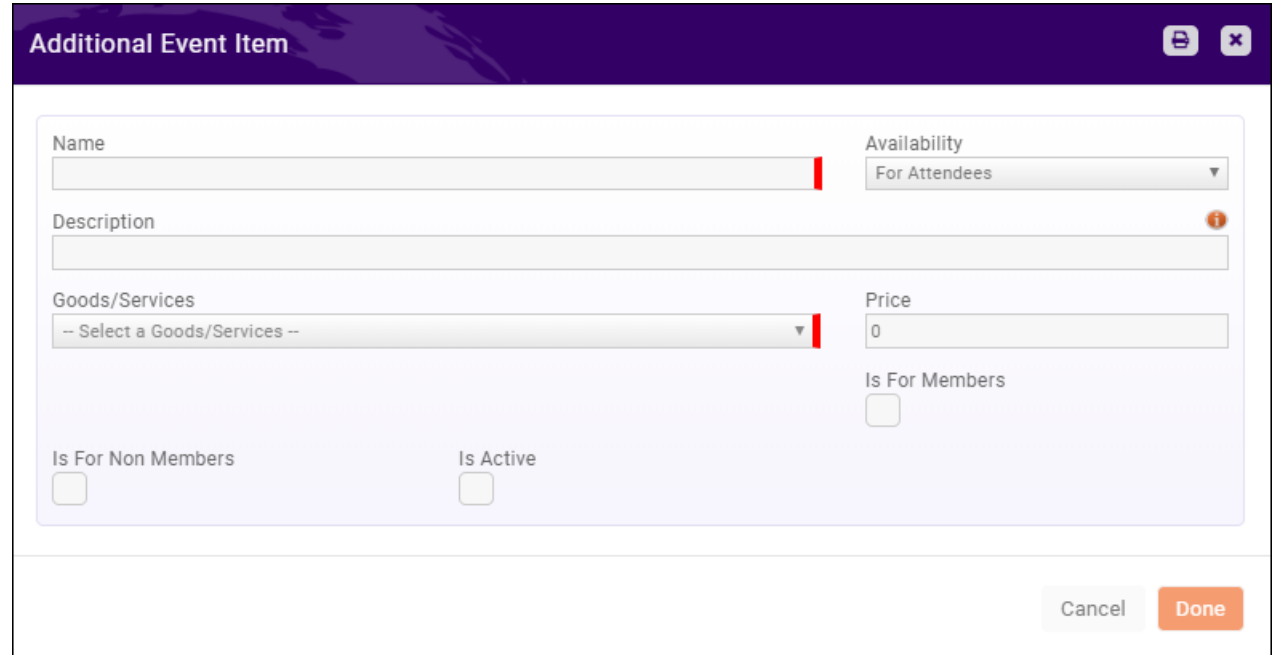


The 'Add Volume Discount' dialog box shows fields for Name, Available Starting On, Ends On, and Minimum Quantity for Discount. The 'Minimum Quantity for Discount' field is highlighted with a red box. Below are radio buttons for 'Reduce Price by Percentage', 'Reduce Price by Amount', and 'Set Price To', and a dropdown for 'Applies To (Registration Type)'. There is also a 'Total Available' field, a 'Limit Per Purchase' field, and a 'Can Be Used With Other Discounts' checkbox. At the bottom, there are 'Advanced Options', 'Cancel', and 'Done' buttons.

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](#)



The screenshot shows a web form titled "Additional Event Item" with a dark purple header. The form contains the following fields and controls:


- Name:** A text input field.
- Availability:** A dropdown menu currently set to "For Attendees".
- Description:** A text area with an 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.
- Is For Non Members:** A checkbox.
- Is Active:** A checkbox.

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

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.

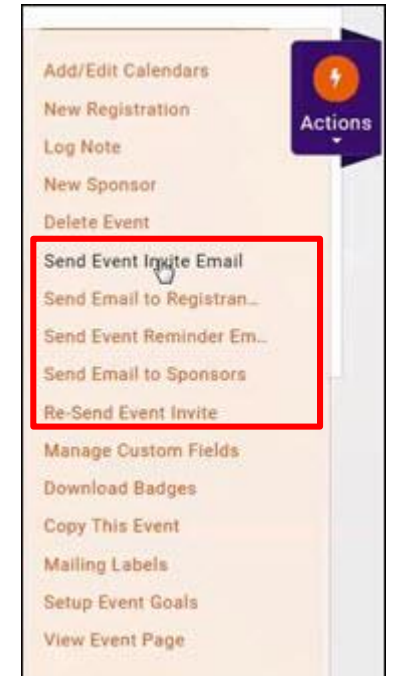
WIKI: [Registration Messages](#)

Instructions and Confirmation Messaging 
Event Registration Instructions
Event Confirmation Message
Thank you for registering for South India Dinner.

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.

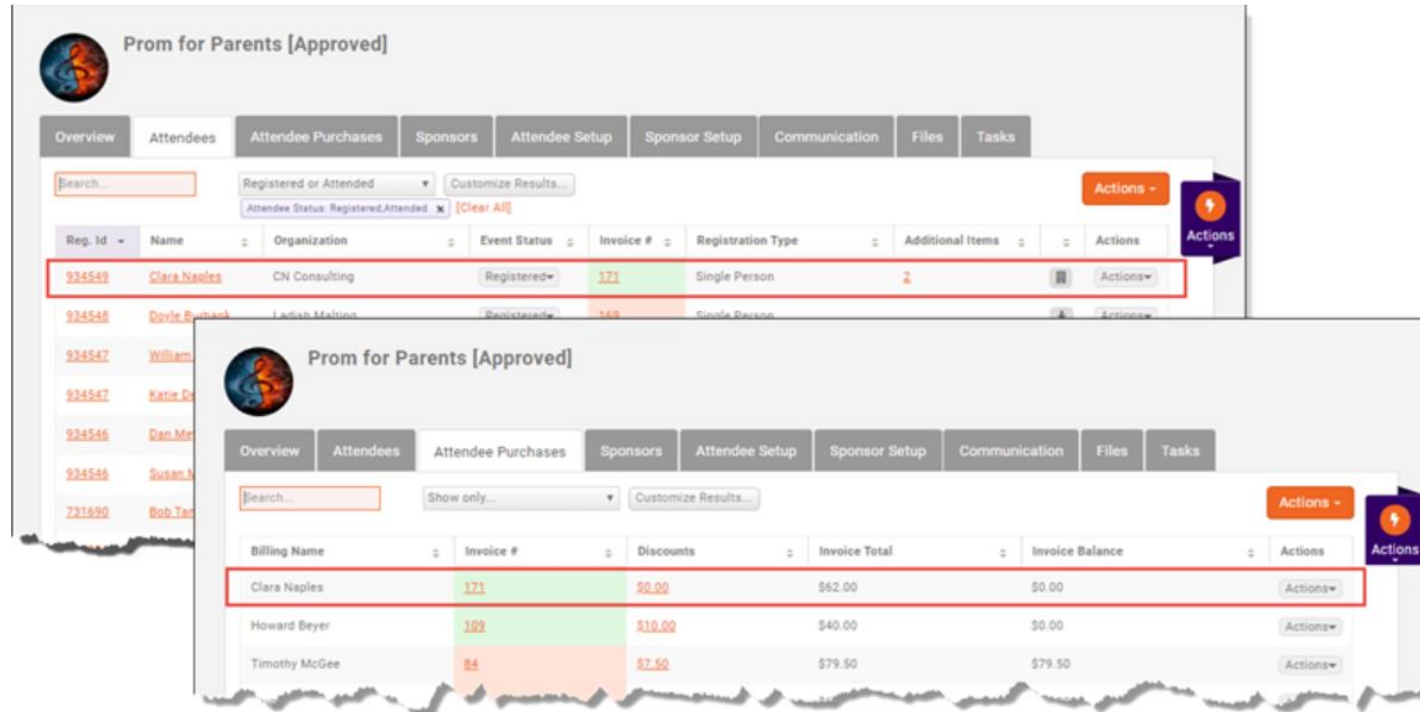
WIKI: [Event Communications](#)



Managing Registrations/Attendees

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

[WIKI: Managing Registrations/Attendees](#)



The screenshot displays the 'Prom for Parents [Approved]' event page in the GrowthZone software. The interface includes a navigation menu with tabs for Overview, Attendees, Attendee Purchases, Sponsors, Attendee Setup, Sponsor Setup, Communication, Files, and Tasks. A search bar and filters for 'Registered or Attended' and 'Attendee Status: Registered, Attended' are visible. The main content area shows a list of attendees with columns for Reg. Id, Name, Organization, Event Status, Invoice #, Registration Type, and Additional Items. A red box highlights the first row: Clara Naples, CN Consulting, Registered, Invoice # 171, Single Person, 2. Below this, a detailed view of the financial information for Clara Naples is shown, with a red box highlighting the row: Clara Naples, Invoice # 171, Discounts \$0.00, Invoice Total \$62.00, Invoice Balance \$0.00. Other attendees listed include Howard Beyer (Invoice # 109, Invoice Total \$40.00, Invoice Balance \$0.00) and Timothy McGee (Invoice # 84, Invoice Total \$79.50, Invoice Balance \$79.50).

Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
934549	Clara Naples	CN Consulting	Registered	171	Single Person	2	Actions
934548	David Berman	Ladish Mabine	Registered	168	Single Person		Actions
934547	William						
934547	Katie D						
934546	Dan M						
934546	Susan M						
731690	Bob T						

Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Clara Naples	171	\$0.00	\$62.00	\$0.00	Actions
Howard Beyer	109	\$10.00	\$40.00	\$0.00	Actions
Timothy McGee	84	\$7.50	\$79.50	\$79.50	Actions


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](#)



The screenshot shows the 'Attendees' tab in the GrowthZone software. The table below lists registrants with columns for Reg. Id, Name, Organization, Event Status, Invoice #, Registration Type, Additional Items, and Actions. A red circle highlights the unnamed column between 'Additional Items' and 'Actions', which contains icons for some registrants.

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

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](#)



The screenshot displays the 'Attendees' tab in the GrowthZone software. At the top, there are navigation tabs: Overview, Attendees (selected), 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 three attendees:

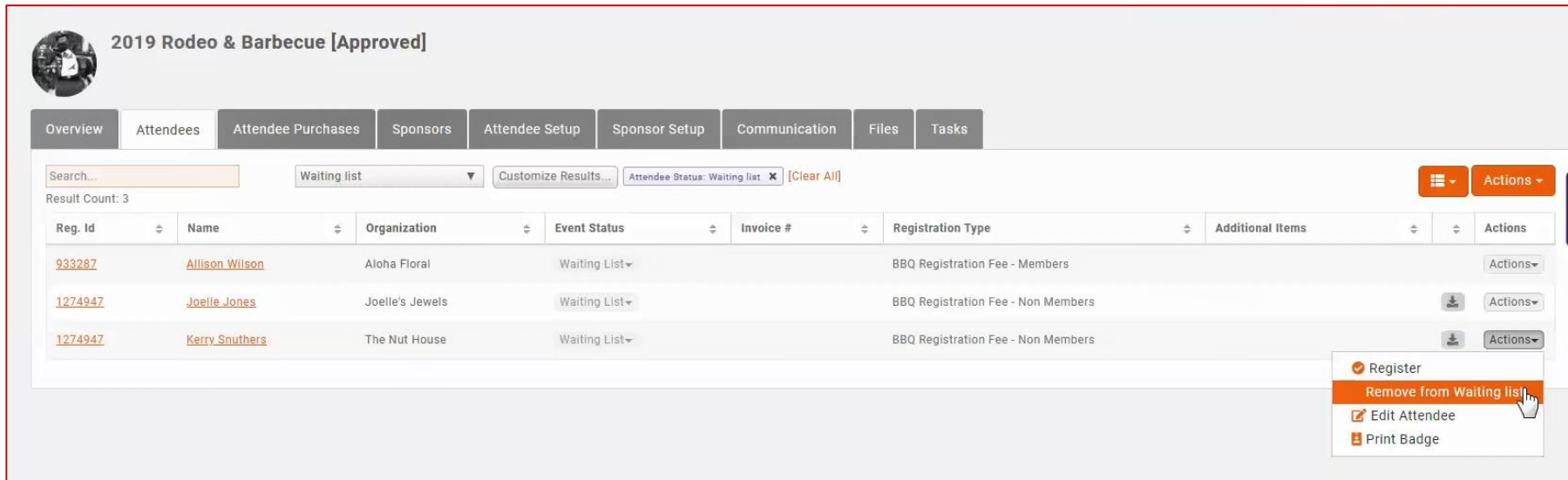
Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
114447	William Daniels	Bill's Guided Tours	Registered	181	Couple		Actions
110651	Wes Wisco		Attended		Pay at the Door/Please invoice Me		Actions
128601	Jessika McLean		Attended	81	Session 3	1	Actions

An expanded 'Actions' menu is shown for the 'Wes Wisco' attendee, which is highlighted with a red box. The menu is split into two sections: 'Unpaid Invoice' and 'Paid Invoice'. The 'Unpaid Invoice' section includes: 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. A red arrow points from the 'Actions' button in the table to the 'Paid Invoice' section of the menu.

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](#)



2019 Rodeo & Barbecue [Approved]

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

Search... Waiting list Customize Results... Attendee Status: Waiting list [Clear All]

Result Count: 3

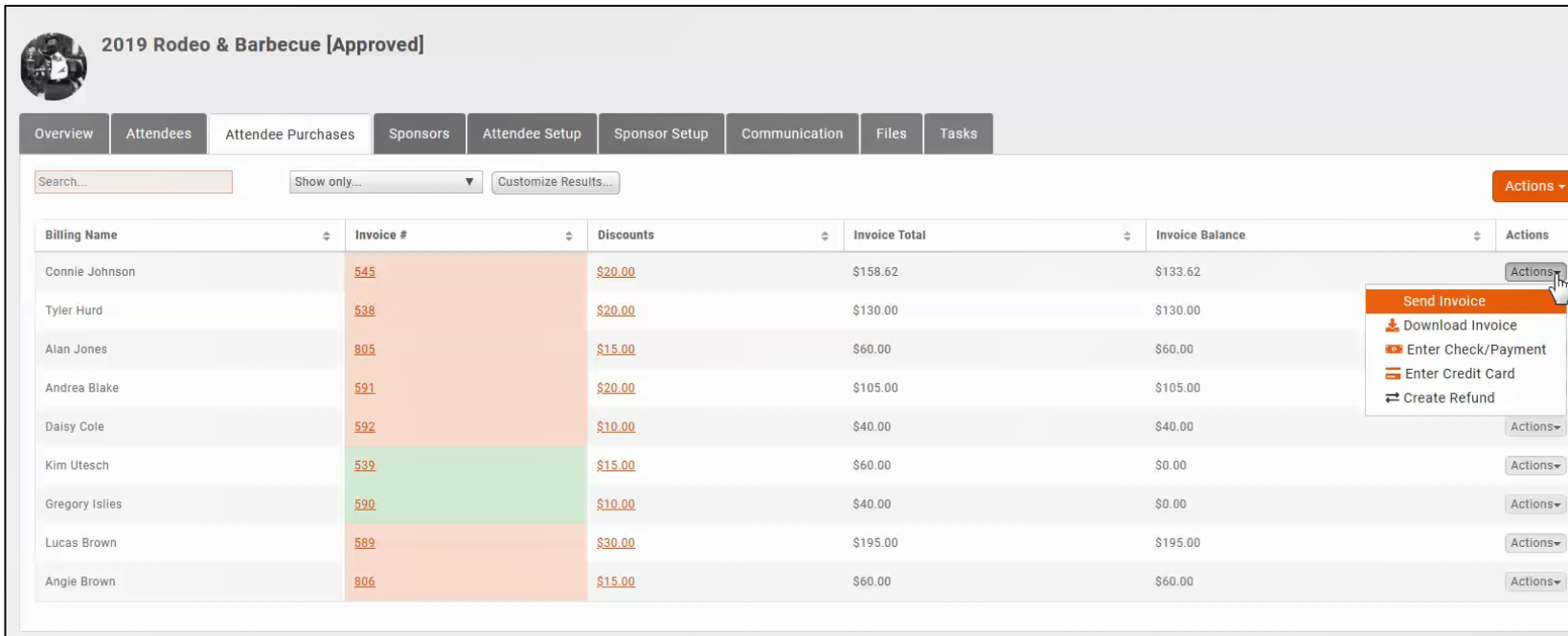
Reg. Id	Name	Organization	Event Status	Invoice #	Registration Type	Additional Items	Actions
933287	Allison Wilson	Aloha Floral	Waiting List		BBQ Registration Fee - Members		Actions
1274947	Joelle Jones	Joelle's Jewels	Waiting List		BBQ Registration Fee - Non Members		Actions
1274947	Kerry Snuthers	The Nut House	Waiting List		BBQ Registration Fee - Non Members		Actions

- Register
- Remove from Waiting list
- Edit Attendee
- Print Badge

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](#)



2019 Rodeo & Barbecue [Approved]

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

Search... Show only... Customize Results... Actions

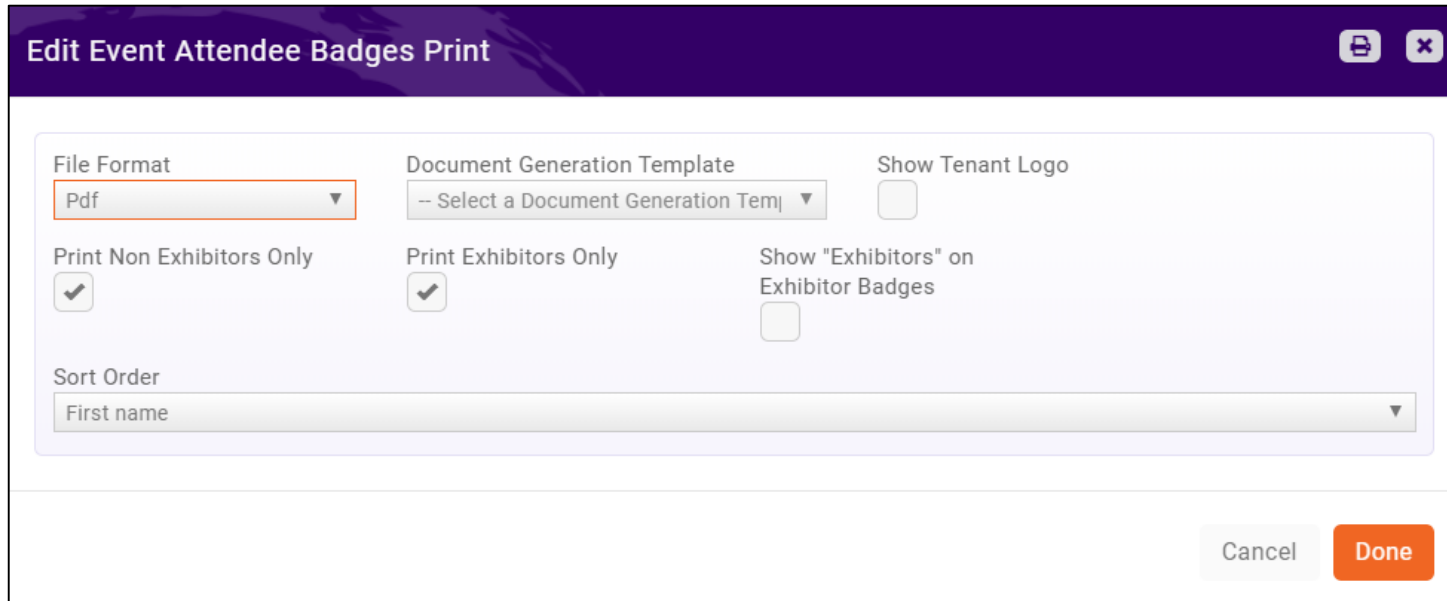
Billing Name	Invoice #	Discounts	Invoice Total	Invoice Balance	Actions
Connie Johnson	545	\$20.00	\$158.62	\$133.62	Actions
Tyler Hurd	538	\$20.00	\$130.00	\$130.00	Actions
Alan Jones	805	\$15.00	\$60.00	\$60.00	Actions
Andrea Blake	591	\$20.00	\$105.00	\$105.00	Actions
Daisy Cole	592	\$10.00	\$40.00	\$40.00	Actions
Kim Utesch	539	\$15.00	\$60.00	\$0.00	Actions
Gregory Islies	590	\$10.00	\$40.00	\$0.00	Actions
Lucas Brown	589	\$30.00	\$195.00	\$195.00	Actions
Angie Brown	806	\$15.00	\$60.00	\$60.00	Actions

Send Invoice
Download Invoice
Enter Check/Payment
Enter Credit Card
Create Refund

Download Badges

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

WIKI: [Download Name Badges](#)



The screenshot shows a dialog box titled "Edit Event Attendee Badges Print" with a dark purple header. The dialog contains several configuration options for generating attendee badges:

- File Format:** A dropdown menu currently set to "Pdf".
- Document Generation Template:** A dropdown menu with the text "-- Select a Document Generation Template".
- Show Tenant Logo:** An unchecked checkbox.
- Print Non Exhibitors Only:** A checked checkbox.
- Print Exhibitors Only:** A checked checkbox.
- Show "Exhibitors" on Exhibitor Badges:** An unchecked checkbox.
- Sort Order:** A dropdown menu currently set to "First name".

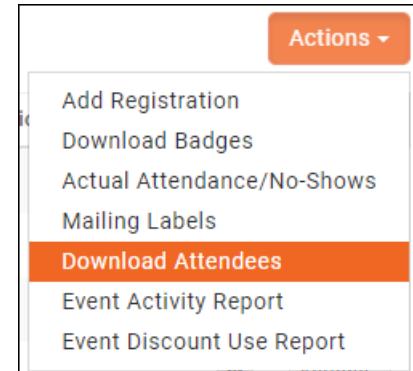
At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

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

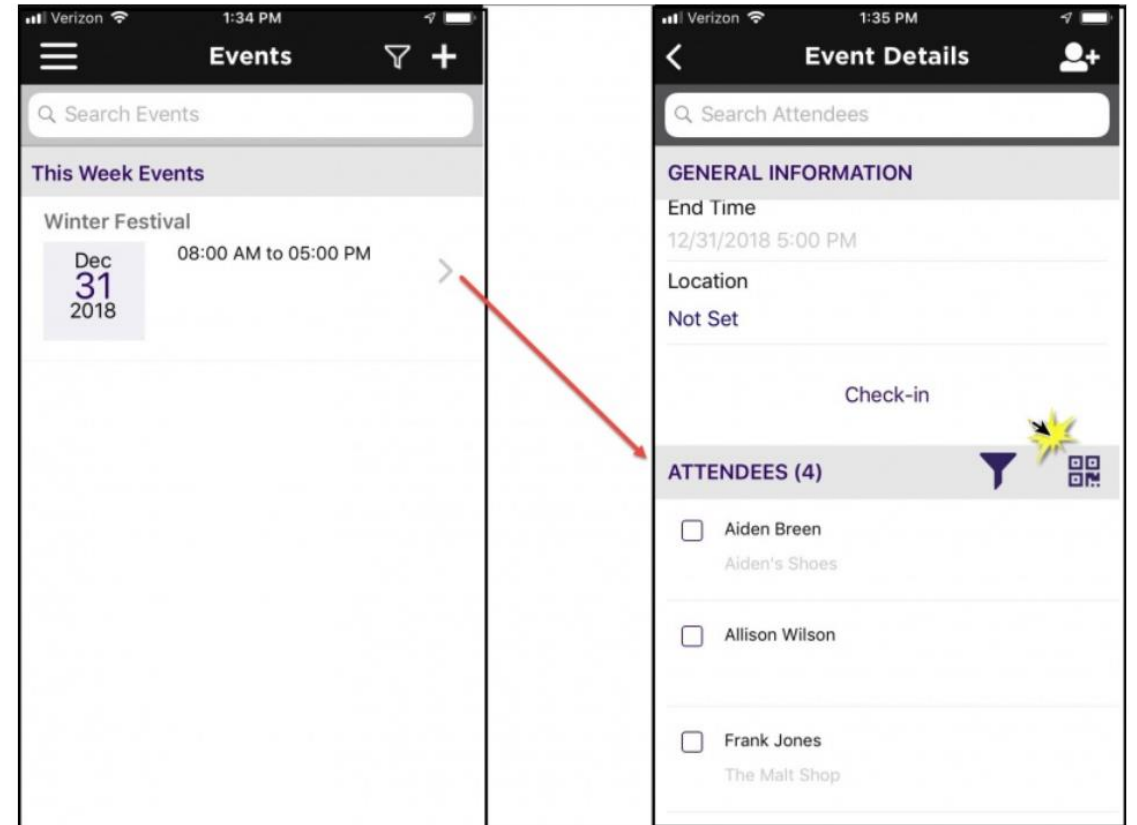
You may check-in your attendees in several ways:

- WIKI: [From the Guest List](#)
- WIKI: [From the Actions on the Attendees Tab](#)
- WIKI: [Using the Staff App](#)

Checking in Attendees

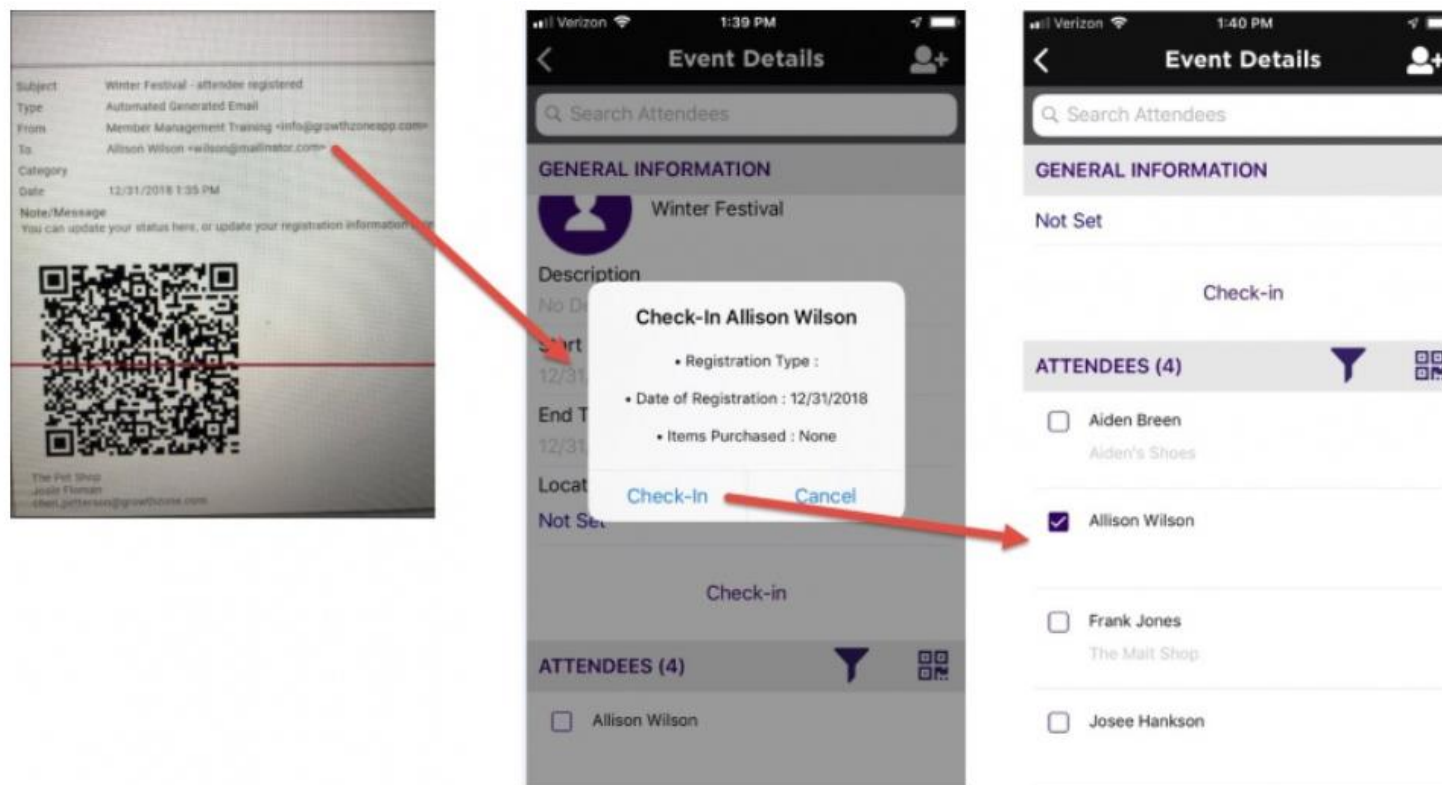
Using the Staff App to Check-in Event Attendees

- WIKI: [Using the Staff App](#)



Checking in Attendees

Using the Staff App to Check-in Event Attendees



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??