

# 5 Efficiencies Gained In Implementing GrowthZone Pay



# 5 Efficiencies Gained with GrowthZone Pay

GrowthZone Pay allows you to easily process one-time credit card, debit card, and bank payments!

This session will describe the efficiencies that you and your staff will realize by implementing GrowthZone Pay as your payment processor



# 1... Staff saves time by using stored profiles For Membership Dues

- By allowing your members to store their credit cards/bank accounts, you save time by charging dues and other recurring fees to those cards/bank accounts
- At the click of the button, all your membership dues are paid... increasing your cashflow – no need to send emails, or print invoices to be sent out

Scheduled Billing									
Description	Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
<a href="#">Annual Membership</a>	Premier Membership	Joe Macaroon	Annually	\$1.00	\$0.00	Visa:*****3967-10/2023	1/29/2019	1/29/2020	

# 1... Staff saves time by using stored profiles For Membership Dues

## WIKI: Store Member Credit Card/Bank Account

**Macaroons** [Active] [Account Number] Add Tags

Profile More Info INDIVIDUALS Activity Communication **Billing \$1.08** Web Content Tasks Files

**Summary**

Balance	Available Credits	Tax Set Name
\$1.08	\$0.00	Not Set

**Billing Notes**

From	Date	Subject
None to display		

**Scheduled Billing**

Description	Membership	Bill Contact	Frequency	Amount	Discount
<a href="#">Annual Membership</a>	Premier Membership	Joe Macaroon	Annually	\$1.00	\$0.00

**Edit Recurring Billing Item**

Time saver tip! When Billing Contact info is updated, the Membership Billing Contact and related recurring billings will also be updated for you when applicable.

Customer: Macaroons | Billing Contact: Joe Macaroon | Billing Address: 123 South Street Crosby MN | Billing Email: macarooms@mailinator.com

**Item**

Item	Description	Qty	Price	Per Bill Amount	MEMBERSHIP	Campaign
Annual Membership	Annual Membership	1	1	\$1.00	Premier Membership	1/29/2019

**Date Settings**

Billing Frequency: Annually | Start Date: 1/29/2019 | End Date: | Next Bill Date: 1/29/2020

**Discounts**

Discount	Discount Description	Start Date	End Date	Amt	%
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**Invoice Settings**

Print Invoice:  | Email Invoice:  | Term: Due Now | Payment Profile: -- Select a Payment Profile --  
Select a Payment Profile: Visa\*\*\*\*\*3967-10/2023

Delete Cancel Done

# 1... Staff saves time by using stored profiles For Membership Dues

- When invoices are generated for members who have stored payment profiles, and have agreed to automatic charges, the day invoices are generated for upcoming billing, the stored payment profile will be charged!
- WIKI: [Processing Invoices for Upcoming Billing](#)
- Your members will be automatically notified that the payment has been processed – no extra step

A Payment has been automatically applied to Invoice 186519

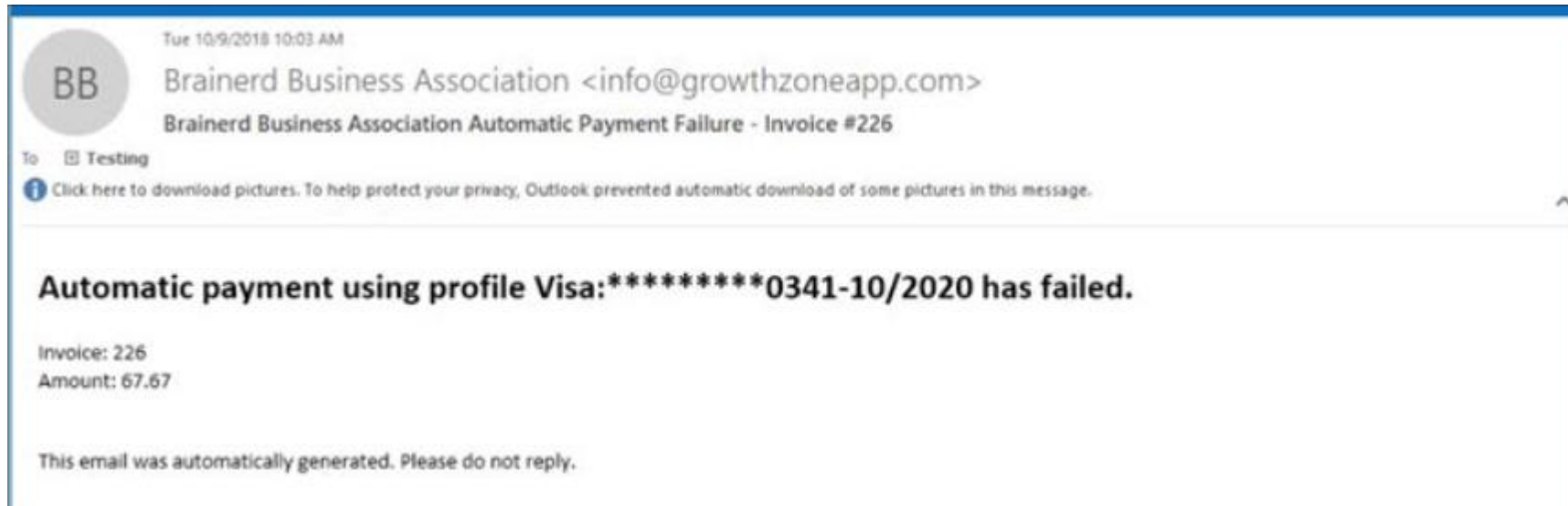
Total Payment= 149.04  
Payment Date: 10/22/2018  
Transaction ID: 2215702

**Thank you for your payment!**  
To view the paid invoice, [click here](#).

If you have any questions, please contact us at:  
GrowthZone  
(800) 825-9171  
[accounting@growthzone.com](mailto:accounting@growthzone.com)

# 1... Staff saves time by using stored profiles For Membership Dues

If a payment fails - staff members who have subscribed to the **Auto-payment Failed** notification will also receive an email. **NOTE:** An attempt will be made to charge the account again every 24 hours for five days when a card or bank account has failed




# 1... Staff saves time by using stored profiles For Membership Dues

## Getting Started...

- Verify if any of your members have stored cards... [Stored Payment Profile Report](#)
- Invite your members to store their cards... [Store Profile in Info Hub](#)
- Associate the profile to the recurring fees schedule... [Store Member Credit Card/Bank Account](#)

Results

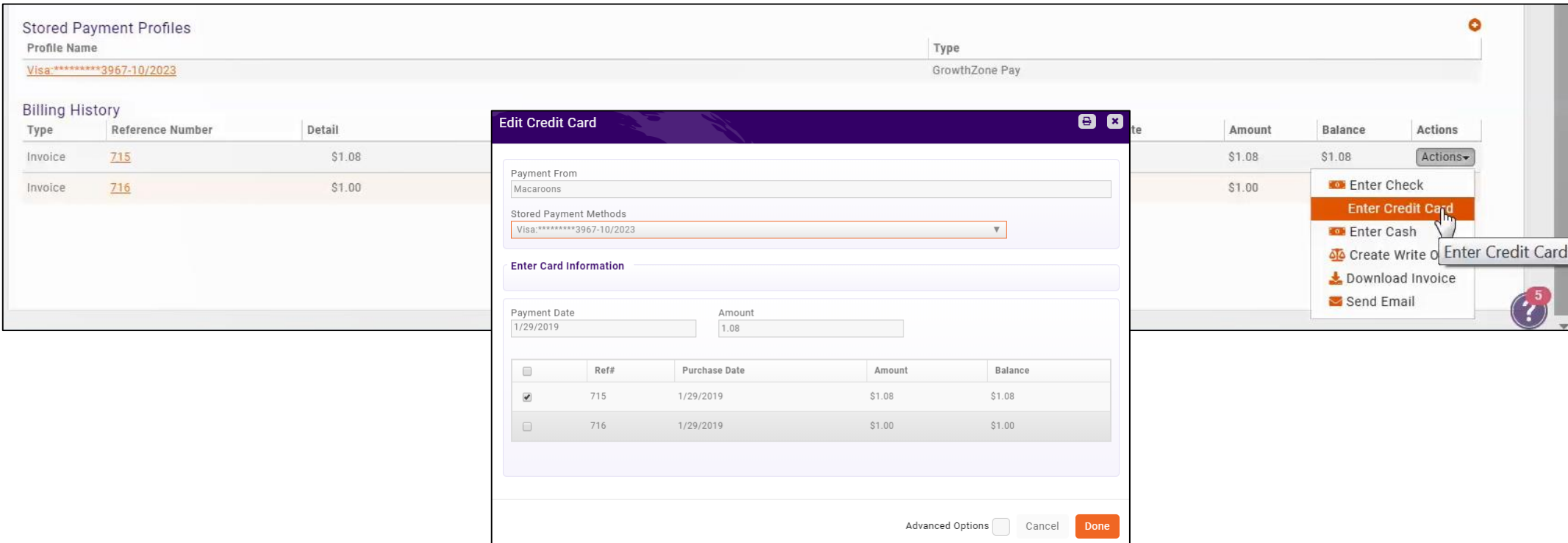
Contact Name ↕	Payment Gateway Name ↕	Payment Gateway Type ↕	Last Successful Payment Date ↕	Scheduled Item Count ↕
Noob Guy	Visa:*****2099-8/2020	Stripe		0
Jeri Johnson	Visa:*****2099-8/2021	Stripe		0
Jeri Johnson	Visa:*****2099-8/2020	Stripe		0
Cookie Shop	Visa:*****2099-8/2020	Stripe		1
Junior Fig	Visa:*****2099-9/2020	Stripe		0
Junior Fig	Visa:*****2099-8/2020	Stripe		0
Junior Fig	Visa:*****2099-8/2020	Stripe		0
Rachel Raisin	Visa:*****2099-8/2020	Stripe		0
Rachel Raisin	Visa:*****2099-8/2020	Stripe		0
John's Plumbing	Visa:*****2099-8/2020	Stripe		0



## 2... Staff saves time by using stored profiles for open invoices

If a member has an open invoice, with permission, you can efficiently pay that open invoice with a stored profile...

WIKI: [Accept a Credit Card Payment](#)



The screenshot displays the GrowthZone software interface. On the left, the 'Billing History' table shows two invoices:

Type	Reference Number	Detail
Invoice	715	\$1.08
Invoice	716	\$1.00

In the center, the 'Edit Credit Card' dialog box is open, showing the 'Stored Payment Methods' dropdown menu with the selected profile: 'Visa:\*\*\*\*\*3967-10/2023'. Below this, the 'Enter Card Information' section includes fields for 'Payment Date' (1/29/2019) and 'Amount' (1.08). A table within the dialog lists the selected payment items:

<input type="checkbox"/>	Ref#	Purchase Date	Amount	Balance
<input checked="" type="checkbox"/>	715	1/29/2019	\$1.08	\$1.08
<input type="checkbox"/>	716	1/29/2019	\$1.00	\$1.00

At the bottom of the dialog are 'Advanced Options', 'Cancel', and 'Done' buttons. On the right, a portion of the main interface is visible, showing a table with columns for 'Amount', 'Balance', and 'Actions'. An 'Actions' dropdown menu is open, with 'Enter Credit Card' highlighted. Other options in the menu include 'Enter Check', 'Enter Cash', 'Create Write Off', 'Download Invoice', and 'Send Email'. A notification badge with the number '5' is visible in the bottom right corner of the interface.







# 3... Members efficiently pay open invoices on-line

Members will be able to view their transactions in the Info Hub and pay using the stored credit card....

WIKI: [Pay Invoice in Info Hub](#)

BILLING HISTORY

TYPE	TRANSACTION DATE	REF #	CONTACT NAME	DETAIL ITEMS	AMOUNT	BALANCE	ACTIONS
Invoice	10/1/2018	603	Junior Fig	CTA Early Bird Discount Event - Junior Fig - Member Registration - Event Registration	\$1.00	\$1.00	
Refund	10/1/2018	3869	Junior's Figs	 \$9.50 602	\$14.00	\$0.00	Actions▼

-  Enter Credit Card
-  Download Invoice

### Edit Credit Card

Payment From: Junior's Figs

Stored Payment Methods


- Select a Stored Payment Method --
- Select a Stored Payment Method --**
- Visa:\*\*\*\*\*2099-9/2020
- Visa:\*\*\*\*\*2099-8/2020
- Visa:\*\*\*\*\*2099-8/2020

Address Line 1: [ ] 1 2019 [ ]

### 3... Members can easily pay open invoices on-line

They will also be able to pay with a stored credit card, from the “pay bill on-line” link on their invoice

Peter's Test DB -INTERNAL  
4750 Calhoun Rd., Room 325A  
Nisswa MN 56473  
Tel 7632183516  
E-Mail peter@psaeger.com



INVOICE 715	PO NUMBER	1/29/2019		
BILL TO		MESSAGE		
Macaroons Joe Macaroon 123 South Street Crosby, MN 56441				
QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL	
1	Annual Membership	1.00	1.00	
	SUBTOTAL		1.00	
	SALES TAX		0.08	
	SHIPPING & HANDLING		0.00	
	TOTAL		1.08	
	PAYMENT/CREDIT/WRITE OFF/DISCOUNTS APPLIED		(0.00)	
	TOTAL DUE BY 1/29/2019		1.08	
Thank you for your business!				
CURRENT	31-60 DAYS PAST DUE	61-90 DAYS PAST DUE	OVER 90 DAYS PAST DUE	TOTAL OPEN INVOICE
1.08	0.00	0.00	0.00	1.08

[Submit payment online here](#)

# 3... Members can easily pay open invoices on-line


QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
1	Annual Membership	1.00	1.00
	SUBTOTAL		1.00
	SALES TAX		0.08
	SHIPPING & HANDLING		0.00
	<b>TOTAL</b>		<b>1.08</b>
	PAYMENT/CREDIT/WRITE OFF/DISCOUNTS APPLIED		(0.00)
	<b>TOTAL DUE BY 1/29/2019</b>		<b>1.08</b>

Thank you for your business!

CURRENT	31-60 DAYS PAST DUE	61-90 DAYS PAST DUE	OVER 90 DAYS PAST DUE	TOTAL OPEN INVOICE
1.08	0.00	0.00	0.00	1.08

[Submit payment online here](#)

Invoice #715  
Due 1/29/2019



### Peter's Test DB -INTERNAL

Invoices	Total	Balance
<input checked="" type="checkbox"/> #715 1/29/2019 • 1.00 x 1 - Annual Membership	1.08	1.08
<b>Totals</b>	<b>1.08</b>	<b>1.08</b>

Payment Amount:

Saved Payment method:

Use for existing scheduled payments:

Powered by **stripe**

# 4... Members can easily register and pay for events

No processing credit cards or invoices – the system will automatically create the invoice/payment upon registration

WIKI: [Register for an Event via the Info Hub](#)

### Step 2: Registration Types

Name	Price	Quantity
Training Fee (Members Only)	\$1.00	<input type="button" value="-"/> 1 <input type="button" value="+"/>

### Step 4: Payment Information

Total Amount	<input type="text" value="1.00"/>	Pay by Invoice <input type="checkbox"/>
Total Discount	<input type="text" value="0.00"/>	
Tax	<input type="text" value="0.00"/>	
Payment Amount	<input type="text" value="1.00"/>	
Saved Payment method	<div style="border: 1px solid #ccc; padding: 2px;"><p>New Payment Method</p><p><b>New Payment Method</b></p><p>Visa:*****2099-9/2020</p><p>Visa:*****2099-8/2020</p><p>Visa:*****2099-8/2020</p></div>	
Name on Card		
E-mail Address	<input type="text" value="juniorfig@mailinator.com"/>	

## 5...Staff can easily process credit cards at an event

### THE MOBILE CREDIT CARD READER!



Provide more payment options and increase purchases at events!



Payment receipts are emailed to the payor immediately after payment is made!



Your GrowthZone database is automatically updated with payment transactions via the Mobile Card Reader. No more post-event manual input of payments!



## 5...Staff can easily process credit cards at an event

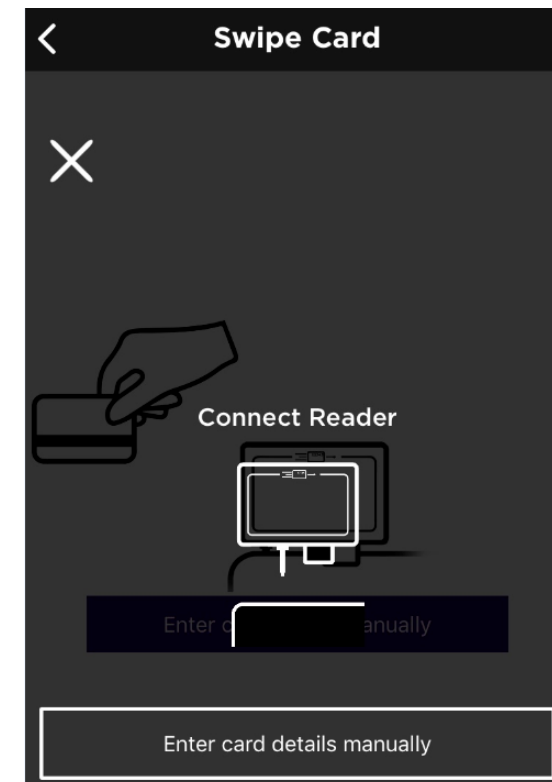
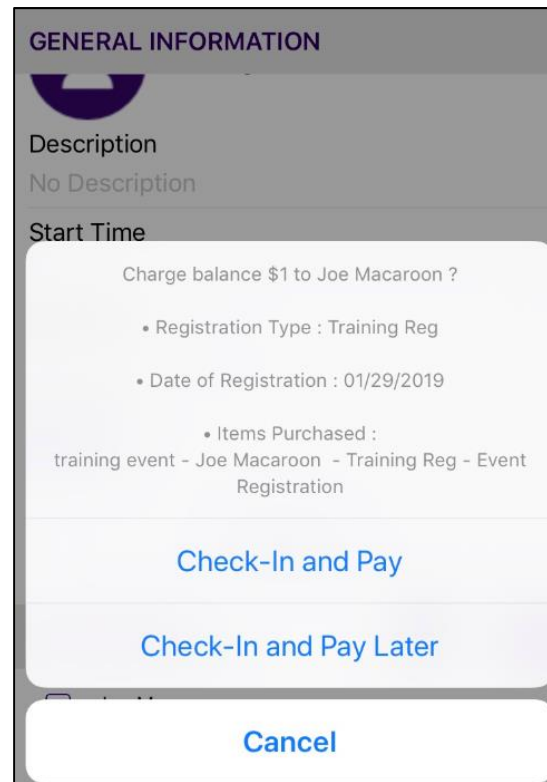
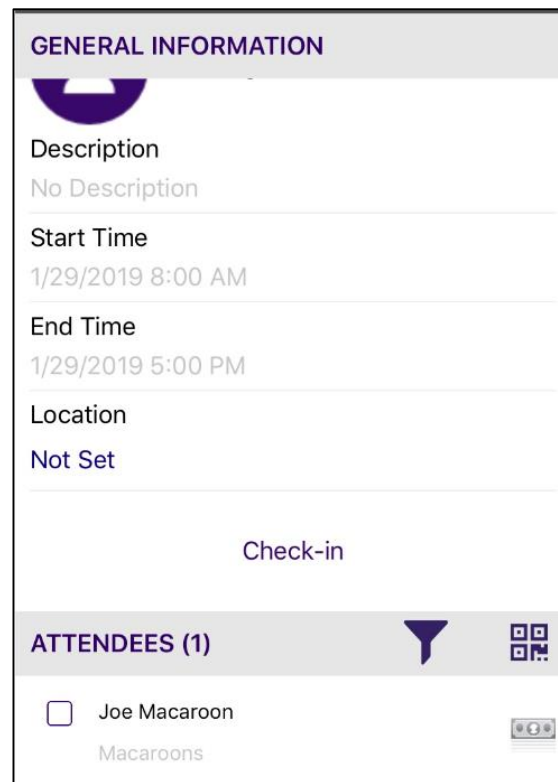
If an attendee has an open invoice, you can accept a credit card payment for that invoice when you check the member in

With GrowthZone Pay you can easily process their credit card, and the appropriate billing transaction will immediately be created






# 5...Staff can easily process credit cards at an event

## WIKI: Accepting Payment with Staff App



# 5...Staff can easily process credit cards at an event

## WIKI: Using the Mobile Reader with the Staff App

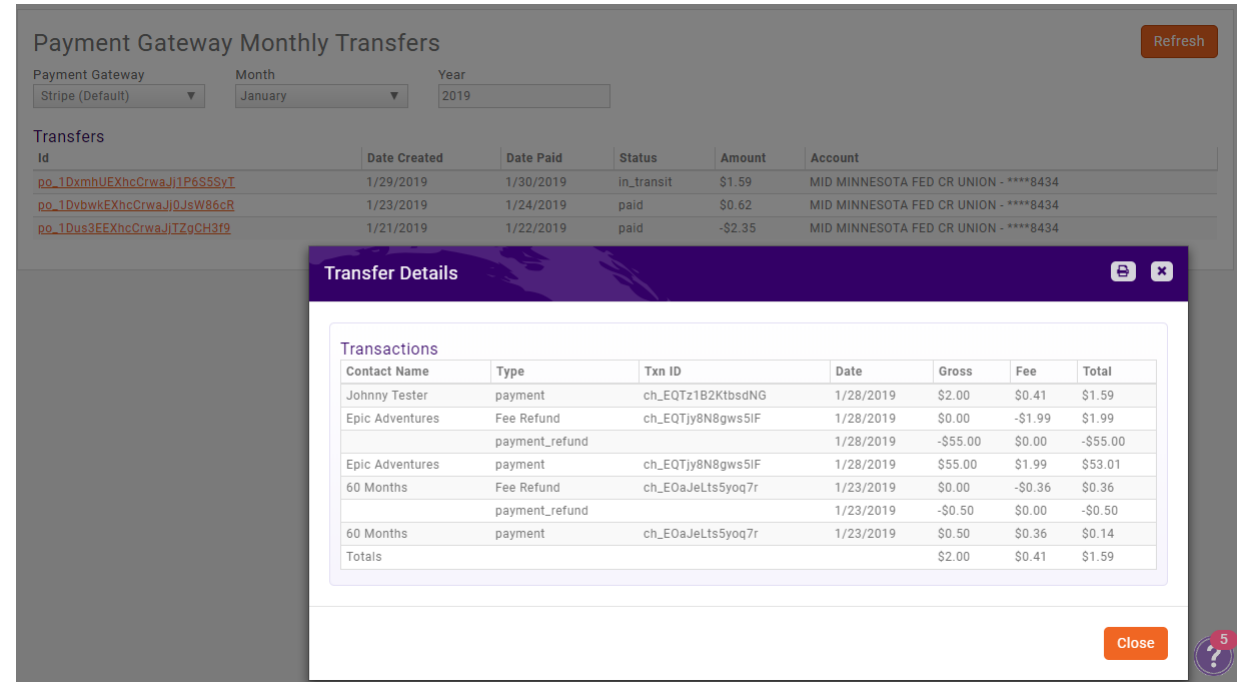
Mobile Reader	Description
	<p>The <b>IDTech Shuttle</b> mobile card reader provides your iPhone and Android mobile device an excellent method for collecting payments. Compatibility with a wide variety of devices makes the Shuttle easy to setup and great for use with the Staff App. Connects via audio jack. Available for purchase at <a href="https://www.POSGuys.com">POSGuys.com</a>.</p>
	<p>The <b>ID TECH iMag Pro II</b> is a magnetic stripe reader for all Apple Lightning connector devices: iPhones and iPads. IDMR-AL30133A - available for purchase at <a href="https://www.POSGuys.com">POSGuys.com</a>. <b>For iPhones without an Audio Jack.</b></p>
	<p><b>ID Tech BTMag Wireless Credit Card Reader</b> - This credit card reader uses your mobile device's Bluetooth feature to wirelessly connect the card reader and your device. This allows for greater flexibility and can solve pesky connection problems where protective cases cause jack-based card readers to not seat correctly. Available for purchase at <a href="https://www.POSGuys.com">POSGuys.com</a>. A micro-B USB charger (common mobile phone charger) is necessary for charging the reader and is not included. <b>NOTE:</b> Credit card readers are non-returnable. This reader currently works only with Apple iOS mobile devices. Please ensure you have an Apple iOS device before ordering this reader.</p> <p><b>BLUE TOOTH SETUP:</b> Before attempting to setup your card reader, please ensure it is fully charged. Charging is complete when the LED indicator stops flashing red.</p> <ol style="list-style-type: none"><li>1. Turn your reader on by pressing and holding the power button for up to 5 seconds. The blue indicator will begin to flash indicating the reader should be visible to your device</li><li>2. Go to your device settings and pair the reader "BTMag" with your device. Help with pairing can be found <a href="#">here</a></li><li>3. If you're prompted to enter a password for the device, enter "0000"</li></ol> <p>The reader should now show as "Connected" on your device and the LED indicator on the reader should be blue. If you have difficulties pairing, please restart or power off/on your devices and try again.</p> <p><b>USE</b> Once paired, you will be able to use the reader from the normal payment screens within the app.</p> <ul style="list-style-type: none"><li>• Successful/Unsuccessful swipes are indicated on the reader by the green/red LED indicator lights and a successful swipe will show immediately in the app</li><li>• The reader should be able to handle roughly 4 hours of constant use and longer for intermittent use</li><li>• The reader handles card swipes from either direction</li><li>• The reader must remain within an acceptable range of the device to function properly</li><li>• The reader can be attached to a lanyard via clip holes or fastened to a device or counter</li></ul>



# Bonus...

All of your record-keeping, managing of refunds, managing of disputes is managed in one central location... your GrowthZone Database!

For Example: The Payment Gateway Monthly Transfers Report shows the details of all deposits made to your bank account, providing the information needed to balance your books



Payment Gateway Monthly Transfers Refresh

Payment Gateway: Stripe (Default) | Month: January | Year: 2019

Transfers

Id	Date Created	Date Paid	Status	Amount	Account
<a href="#">po_1DxmhUEXhcCrwaJJ1P6SS5yT</a>	1/29/2019	1/30/2019	in_transit	\$1.59	MID MINNESOTA FED CR UNION - ****8434
<a href="#">po_1DvbwkEXhcCrwaJJ0JsW86cR</a>	1/23/2019	1/24/2019	paid	\$0.62	MID MINNESOTA FED CR UNION - ****8434
<a href="#">po_1Dus3EEEXhcCrwaJJTZgCH3f9</a>	1/21/2019	1/22/2019	paid	-\$2.35	MID MINNESOTA FED CR UNION - ****8434

Transfer Details

Transactions

Contact Name	Type	Txn ID	Date	Gross	Fee	Total
Johnny Tester	payment	ch_EQTz1B2KtbsdNG	1/28/2019	\$2.00	\$0.41	\$1.59
Epic Adventures	Fee Refund	ch_EQTjy8N8gws5IF	1/28/2019	\$0.00	-\$1.99	\$1.99
	payment_refund		1/28/2019	-\$55.00	\$0.00	-\$55.00
Epic Adventures	payment	ch_EQTjy8N8gws5IF	1/28/2019	\$55.00	\$1.99	\$53.01
60 Months	Fee Refund	ch_EOaJeLts5yoq7r	1/23/2019	\$0.00	-\$0.36	\$0.36
	payment_refund		1/23/2019	-\$0.50	\$0.00	-\$0.50
60 Months	payment	ch_EOaJeLts5yoq7r	1/23/2019	\$0.50	\$0.36	\$0.14
Totals				\$2.00	\$0.41	\$1.59

Close

- Staff can efficiently process recurring membership dues
- Staff can efficiently make payments on existing invoice
- Members can efficiently pay invoices (both from an invoice and through the Info Hub)
- Members can efficiently and easily pay for event registrations
- Staff can efficiently accept payments for event registrations
- All reporting in central location
- **ALL WITH A SINGLE POINT OF SUPPORT!!**

# Questions?

Ready to implement GrowthZone Pay? Contact [sales@growthzone.com](mailto:sales@growthzone.com)

