

GrowthZone - Managing your Contacts & Members - The Basics

Cheri Petterson

Agenda

- Contact Management module
 - Adding new contacts
 - Updating Contact information
- Managing your Memberships
 - Adding Membership
 - Upgrading, Downgrading, Dropping
- Info Hub Access
- Reporting

Contact Management

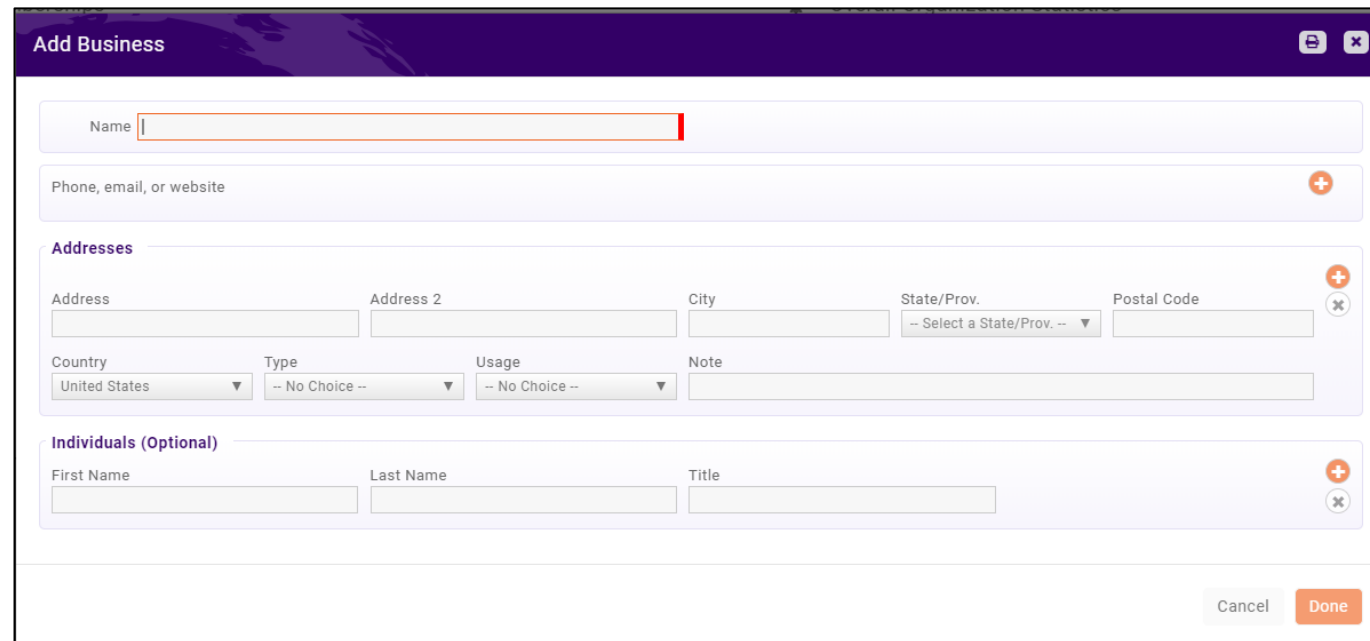
- GrowthZone has several integrated components and features to save you time and effort
- Through Contact Management you can enter information once and updates automatically ripple throughout your entire system
- Including automated Contact Us notifications, lists, committees, tasks, etc. you can take full benefit of contact management

Contact Management Module

- How Contacts Can Be Added
 - Contacts are Automatically added when
 - Online application/membership is completed
 - A new registrant completes the event registration form
 - A new donor completes a donation form
 - Sales opportunity is created by staff users
 - By staff or authorized Contacts
 - Back office staff using “Add” or + buttons
 - Contact in the Info Hub with permissions to add new contacts
 - Contact Us form completion (staff would select to “create new” when viewing responses)

Add Contact

- Quick Actions
 - [Add Organization](#)
 - [Add Individual](#)



The screenshot shows a web form titled "Add Business" with a dark purple header. The form is divided into several sections:

- Name:** A single text input field.
- Phone, email, or website:** A text input field with a red plus icon on the right.
- Addresses:** A section with a red plus icon on the right. It contains:
 - Address:** A text input field.
 - Address 2:** A text input field.
 - City:** A text input field.
 - State/Prov.:** A dropdown menu with "-- Select a State/Prov. --" as the selected option.
 - Postal Code:** A text input field.
 - Country:** A dropdown menu with "United States" selected.
 - Type:** A dropdown menu with "-- No Choice --" selected.
 - Usage:** A dropdown menu with "-- No Choice --" selected.
 - Note:** A text input field.
- Individuals (Optional):** A section with a red plus icon on the right. It contains:
 - First Name:** A text input field.
 - Last Name:** A text input field.
 - Title:** A text input field.

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

Add Contact

- Contact Status

- The status of the contact is displayed below the contact name
- Dynamically driven by the Membership Status
- Ability to change status must be enabled in Setup > Miscellaneous > Contact Status Options



The screenshot shows the contact profile for 'Boardwalk Marina'. The contact name is displayed with an edit icon. Below the name, the status is shown as '[Active]' and '[Account Number]' is a link. There is an 'Add Tags' input field. A red arrow points from the 'Active' status to the 'Active' status in the membership table below.

Memberships			
General Membership	Active	1 year, 2 months	Actions

Contact Status

- **Active** – when an active membership is owned by the Contact or Contact is beneficiary
 - **Courtesy** – a type of Active membership, the “is courtesy” boxed is checked on membership
- **Nonmember** – has never had a membership
- **Prospect** – has an active sales opportunity
- **Dropped** – had a membership that was manually dropped
- **Inactive** – had a membership that they did not renew

Searching for Contacts

Global Search













- Searches database for contacts, projects, images, sales & events



Searching for Contacts

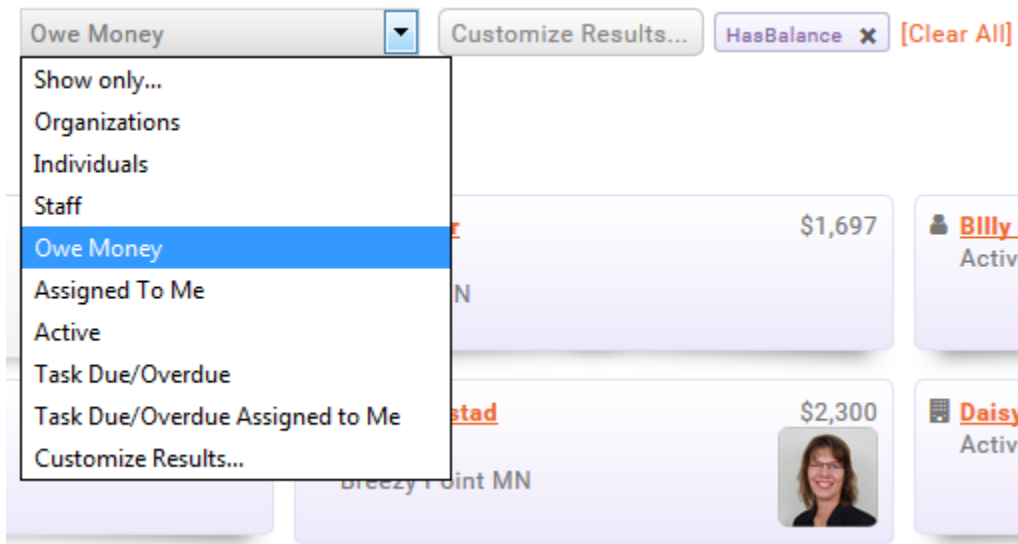
- Search within Contacts Module

Result Count: 140

 Alan Brown Active	 Andrea Anderson Non-Member	 Antiques on Main Non-Member Croabsy MN	 April Conway Active
 Bayview Motel Active	 Bernadette Jones Dropped Biloxi	 Boardwalk Marina Active 503-445-5788	 Bombay's Non-Member 2185479658 Crosby MN
 Brandon Zinda Non-Member	 Breeze Golf Course Active	 Brenda Lundeen Non-Member 2154443333	 Bruce Jones Active

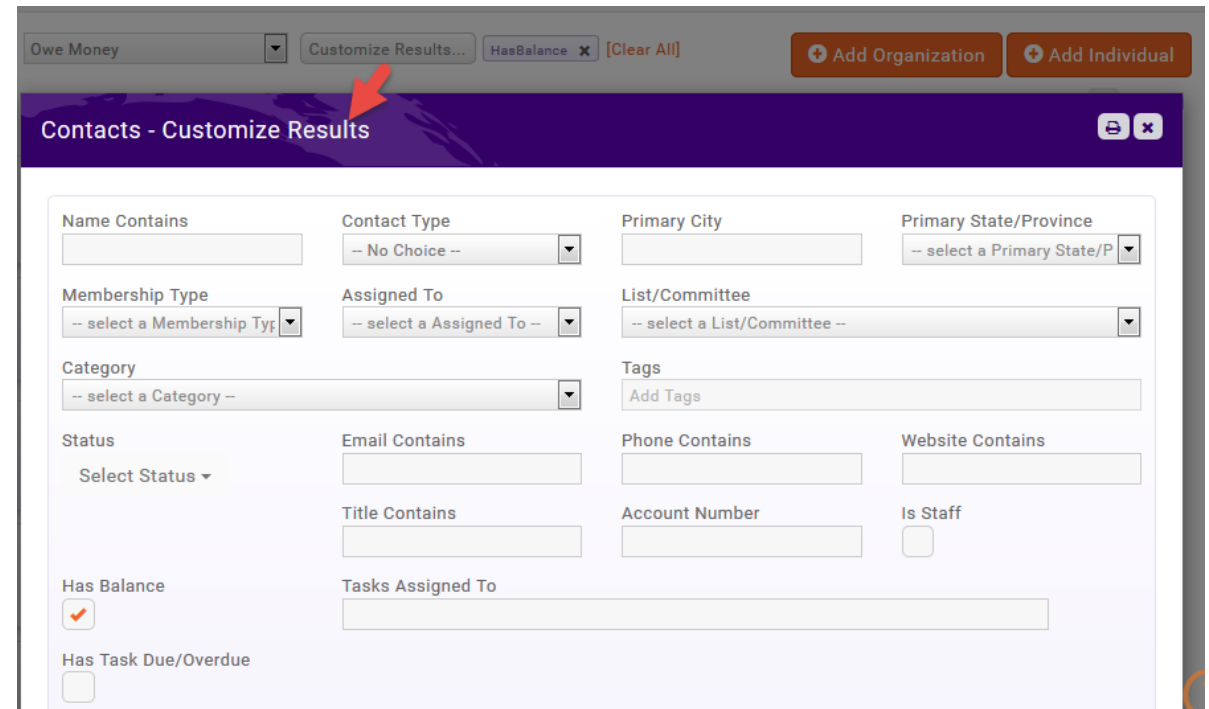
Searching for Contacts

Show Only... (drop down list)



The screenshot shows a search interface with a dropdown menu open. The dropdown menu is titled "Show only..." and contains the following options: Organizations, Individuals, Staff, Owe Money (highlighted in blue), Assigned To Me, Active, Task Due/Overdue, Task Due/Overdue Assigned to Me, and Customize Results... The background shows a list of contacts with columns for name, amount (e.g., \$1,697, \$2,300), and status (Active).


Customize Results button for advanced filters



The screenshot shows the "Customize Results" dialog box. A red arrow points to the "Customize Results..." button in the top navigation bar. The dialog box contains various filters for searching contacts, including:

- Name Contains
- Contact Type (dropdown: -- No Choice --)
- Primary City
- Primary State/Province (dropdown: -- select a Primary State/P --)
- Membership Type (dropdown: -- select a Membership Tyf --)
- Assigned To (dropdown: -- select a Assigned To --)
- List/Committee (dropdown: -- select a List/Committee --)
- Category (dropdown: -- select a Category --)
- Tags (Add Tags)
- Status (dropdown: Select Status)
- Email Contains
- Phone Contains
- Website Contains
- Title Contains
- Account Number
- Is Staff (checkbox)
- Has Balance (checkbox: checked)
- Has Task Due/Overdue (checkbox)
- Tasks Assigned To

Contact - Profile



Tulips

[Active] [null]

< 14 of 100 >

Profile
More Info
Individuals
Activity
Communication
Billing **\$1,175.00**
Web Content
Reports
Tasks **0**
Files

Contact Info

Work	tpetterson@mailinator.com
Work	jmalt@mailinator.com

Contacts

Tami Petterson	User - View Only in Info Hub
Jill Malt	Owner User - View Only in Info Hub
Frank Jones	User - View Only in Info Hub

Lists/Committees

Billing/Finance	4/10/2017
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Categories

Memberships


General Membership	Active	1 month
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Communication

4/5/2017 1:46 PM	Nice Meeting you	CP	0
4/4/2017 1:47 PM	Initial Contact	CP	0
3/26/2017 3:45 PM	{{TenantName}} Payment Receipt - Invoice # {{InvoiceNumber}}	CP	0
3/16/2017 12:37 PM	Welcome to the Chamber	CP	0

Activity

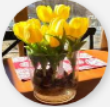
4/5/2017	Email	Nice Meeting you
3/17/2017	New Membership	General Membership
3/12/2017	New Sales Opportunity	




Actions

Contact Profile

- [Add Photo](#)
- [Add Tags](#)
- [Update Contact Info](#)
- [Update Contacts](#)
- [Update Lists & Committees](#)
- [Update Categories](#)
- [Assign Staff](#)



Tulips 

[Active] [null]

◀ 14 of 100 ▶

Profile

More Info

Individuals

Activity

Communication

Billing \$1,175

Contact Info +

Work tpetterson@mailinator.com

Work jmalt@mailinator.com

Contacts +

[Tami Petterson](#) User - View Only in Info Hub

[Jill Malt](#) Owner User - View Only in Info Hub

[Frank Jones](#) User - View Only in Info Hub

Lists/Committees ✎

Billing/Finance 4/10/2017

Categories ✎

Florists Business Category

Restaurants & Specialty Dining Business Category

Contact Info Hub Access

- [Setup Info Hub Access](#)

Edit User Access

Access Level i
User - Primary

Access Level with Associated Organizations

Organization Name Monets Landscaping	Access Level -- Select a Access Level --
Test Business	User - Guest

Cancel Done

Contact Membership

- [Add a Membership to a Contact](#)
- While most of your prospective members may apply on-line, you can also add members directly in the database

Add Membership ✖

Business/Individual
Dollars Drive Landscaping & Nursery

Membership Type
-- Select a Membership Type --

Chapter
-- Select a Chapter --

Membership Start Date
5/11/2018

Is Courtesy

Sales Rep
-- Select a Sales Rep --

Join Reason
-- Select a Join Reason --

Billing Start Date
5/11/2018

Referred By
+

Fees

Item	Description	Membership Price	Membership Term (Months)	Tax	Total Amount	Billing Frequency	Per Bill Discount	Per Bill Amount
+								

Invoice Options

Print

Email

Billing Address
-- Select a Billing Address --

Billing Email
-- Select a Billing Email --

Contact
-- Select a Contact --

Invoice Terms
Due on Receipt

Invoice Message

Advanced Options Cancel Done

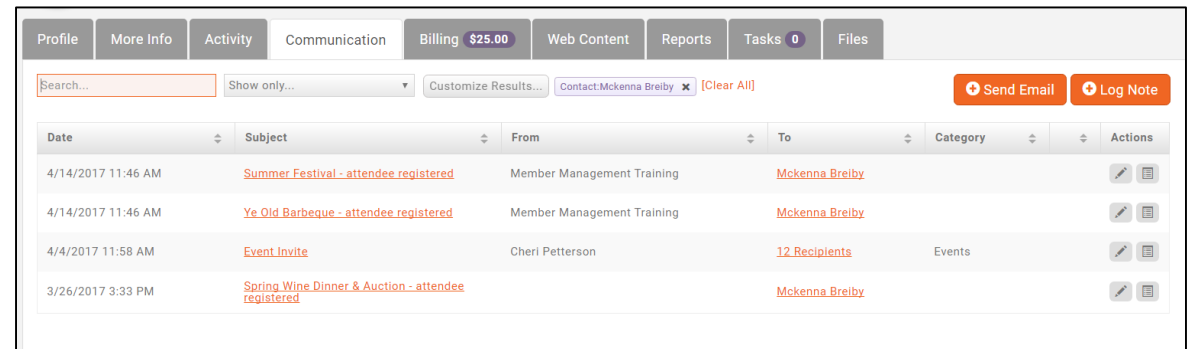
Contact Activity









- All Activity with a contact is tracked on the [Activity](#) tab
- This will include such activity as category changes, relationship changes, primary contact changes, event registrations, etc.

Profile	More Info	Individuals	Activity	Communication	Billing \$2,500.00	Web Content	Reports	Tasks 1	Files
<input type="text" value="Search..."/> <input type="button" value="Show only..."/>									
Result Count: 8									
Date	Type	Description	By						
5/11/2018 12:00 AM	Task due	Volunteer Opportunity	Cheri Petterson						
5/9/2018 4:31 PM	Primary contact	Greg Larson was selected as the Primary Contact	Cheri Petterson						
4/11/2018 4:01 AM	Purchase	Default Membership	Cheri's Sandboxes						
4/10/2018 2:26 PM	Directory Listing	Added Gaufrettes to Active Member Directory	Cheri Petterson						
4/10/2018 2:12 PM	Related Business	A Ambassador Relationship was created between Gaufrettes and Susan Williams	Cheri Petterson						
4/10/2018 2:11 PM	Category	'food' was added	Cheri Petterson						
4/10/2018 2:10 PM	Subscription	Gaufrettes was added to Community News	Cheri Petterson						
4/10/2018 2:06 PM	Contact	Gaufrettes	Cheri Petterson						

Contact Communications

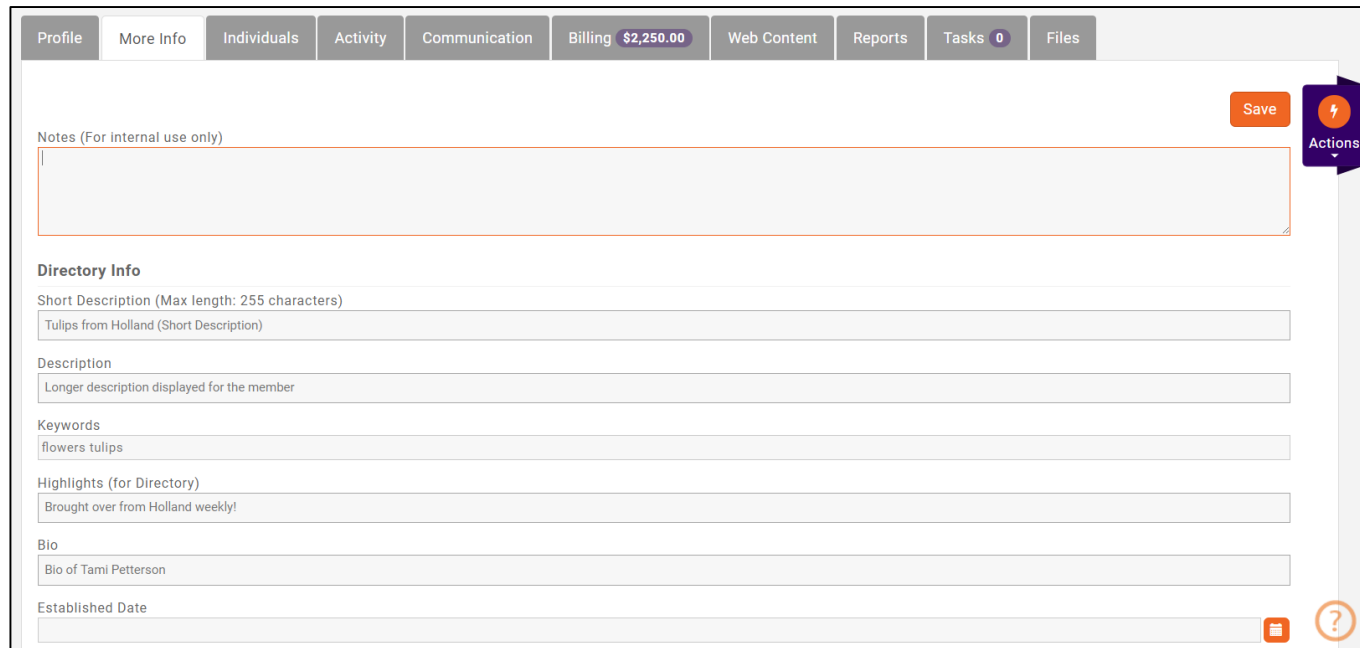
- All communications with a contact are logged on the contact's **Communications** tab
- From here you can send [emails](#) and [log notes/calls](#)



Date	Subject	From	To	Category	Actions
4/14/2017 11:46 AM	Summer Festival - attendee registered	Member Management Training	Mckenna Breiby		 
4/14/2017 11:46 AM	Ye Old Barbeque - attendee registered	Member Management Training	Mckenna Breiby		 
4/4/2017 11:58 AM	Event Invite	Cheri Petterson	12 Recipients	Events	 
3/26/2017 3:33 PM	Spring Wine Dinner & Auction - attendee registered		Mckenna Breiby		 

More Info

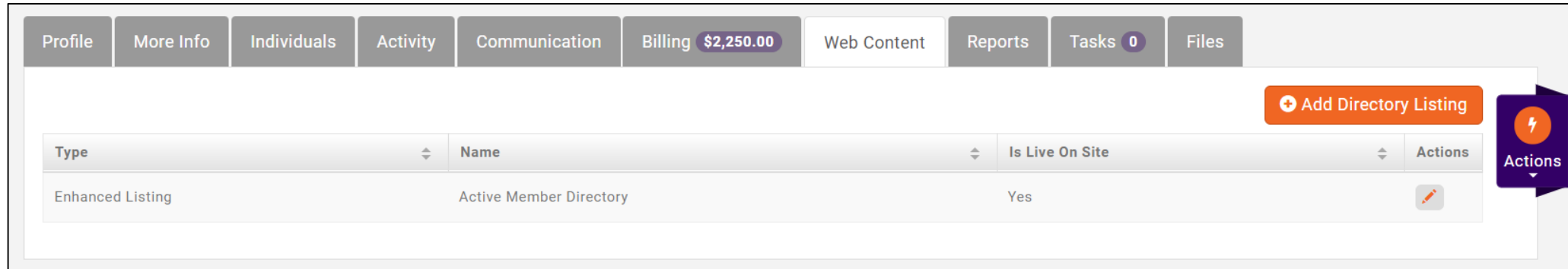
- You can update the [web display](#) information for your new member on the More Info Tab




The screenshot shows the 'More Info' tab selected in a navigation menu. The menu includes: Profile, More Info, Individuals, Activity, Communication, Billing (\$2,250.00), Web Content, Reports, Tasks (0), and Files. The main content area contains a 'Notes (For internal use only)' section with a large text input field and a 'Save' button. Below this is the 'Directory Info' section, which includes: 'Short Description (Max length: 255 characters)' with the value 'Tulips from Holland (Short Description)'; 'Description' with the value 'Longer description displayed for the member'; 'Keywords' with the value 'flowers tulips'; 'Highlights (for Directory)' with the value 'Brought over from Holland weekly!'; 'Bio' with the value 'Bio of Tami Petterson'; and 'Established Date' with an empty input field. On the right side of the form, there is an 'Actions' dropdown menu and a help icon (question mark in a circle).

More Info/Web Content

- You can update the directory listing type on the [Web Content Tab](#)



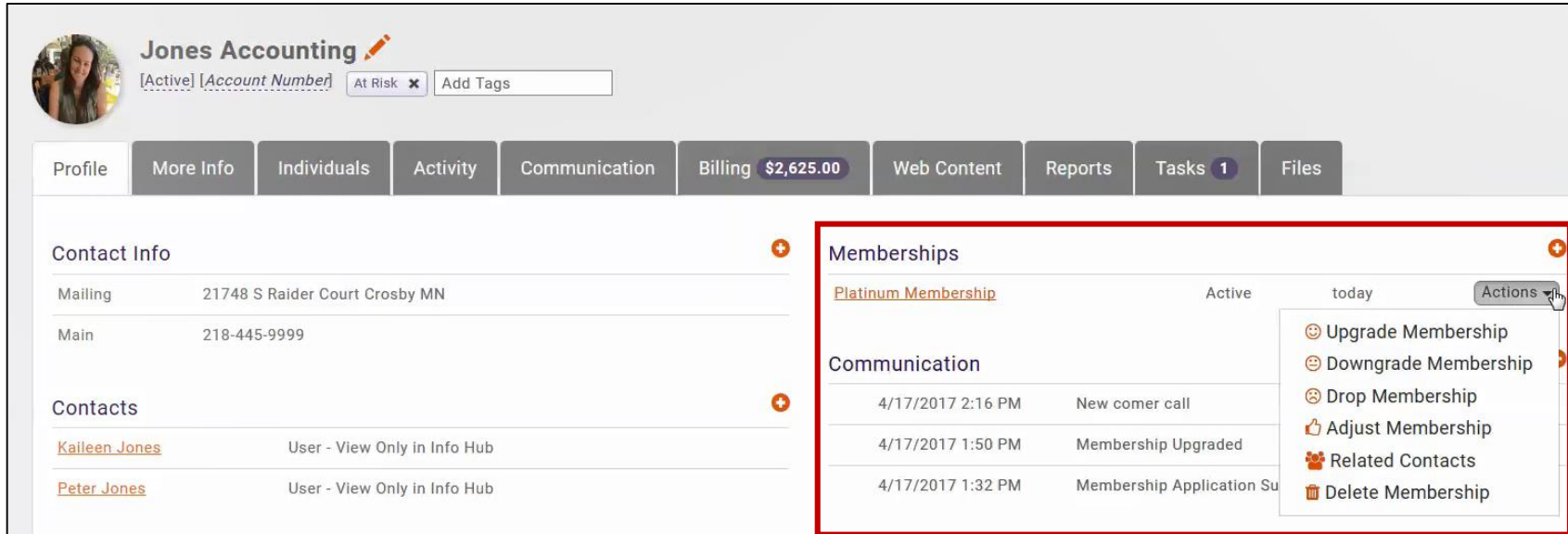
The screenshot shows the 'Web Content' tab selected in a navigation menu. The menu includes: Profile, More Info, Individuals, Activity, Communication, Billing (\$2,250.00), Web Content, Reports, Tasks (0), and Files. An orange button labeled '+ Add Directory Listing' is visible. Below the menu is a table with the following data:


Type	Name	Is Live On Site	Actions
Enhanced Listing	Active Member Directory	Yes	


On the right side of the table, there is a purple 'Actions' button with a lightning bolt icon.

Membership Changes


- [Manage Membership Changes](#)
 - Manage a contacts membership from their Profile tab



Jones Accounting 


[Active] [Account Number] At Risk  Add Tags

Profile More Info Individuals Activity Communication Billing **\$2,625.00** Web Content Reports Tasks **1** Files

Contact Info 


Mailing 21748 S Raider Court Crosby MN


Main 218-445-9999







Contacts 

[Kaileen Jones](#) User - View Only in Info Hub

[Peter Jones](#) User - View Only in Info Hub

Memberships 

[Platinum Membership](#) Active today **Actions** 

-  Upgrade Membership
-  Downgrade Membership
-  Drop Membership
-  Adjust Membership
-  Related Contacts
-  Delete Membership

Communication

4/17/2017 2:16 PM	New comer call
4/17/2017 1:50 PM	Membership Upgraded
4/17/2017 1:32 PM	Membership Application Su

- NOTE: if you upgrade or downgrade a membership – you will want to make the appropriate changes to invoicing on the Billing tab

Membership Details

Clicking on the Contact's Membership on the profile tab will display details and history of changes.

Memberships +

General Membership	Active	1 month	Actions ▾
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Membership Details 🖨️ ✕

Membership Type Platinum Membership	Membership Number <input type="text"/>	Status Active	Renewal Month April ▾	Join Date 4/17/2017 📅
Is Courtesy <input type="checkbox"/>	Owner Jones Accounting	Primary Contact Jones Accounting	Billing Contact Peter Jones	Chapter -- select a Cha ▾

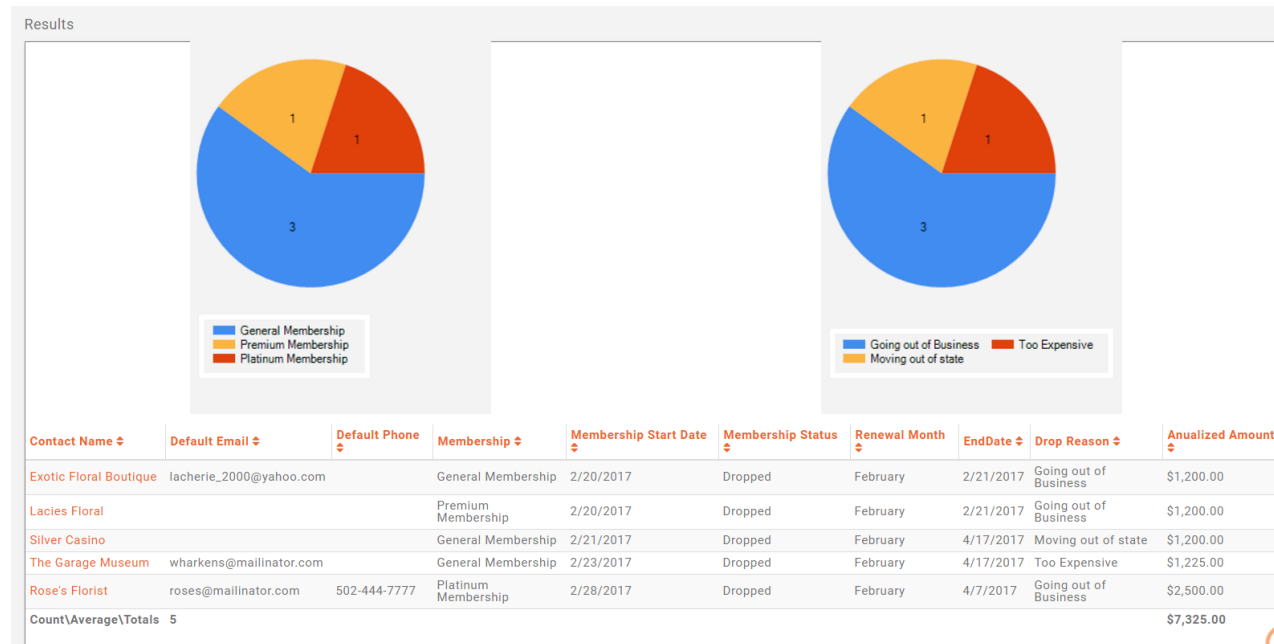
Membership History

Membership Type Name	Purchase Type	Purchase Price	Start Date	End Date	Bill Frequency Description
General Membership	New	\$825.00	4/17/2017	4/17/2017	Annually
Platinum Membership	Upgrade	\$2,550.00	4/17/2017	4/17/2017	Annually
Platinum Membership	Adjustment	\$2,000.00	4/17/2017		Annually

Delete
Cancel
Done

Run Reports

- Filter reports by “Memberships” to view related reports. Use to view your memberships by type and filter details. View membership changes, or specifically drops and new adds





Questions?