Managing your Contacts & Members – The Basics

Agenda

Contact Management module

- Adding new contacts
- Updating Contact information

Managing your Memberships

- Adding Membership
- Upgrading, Downgrading, Dropping

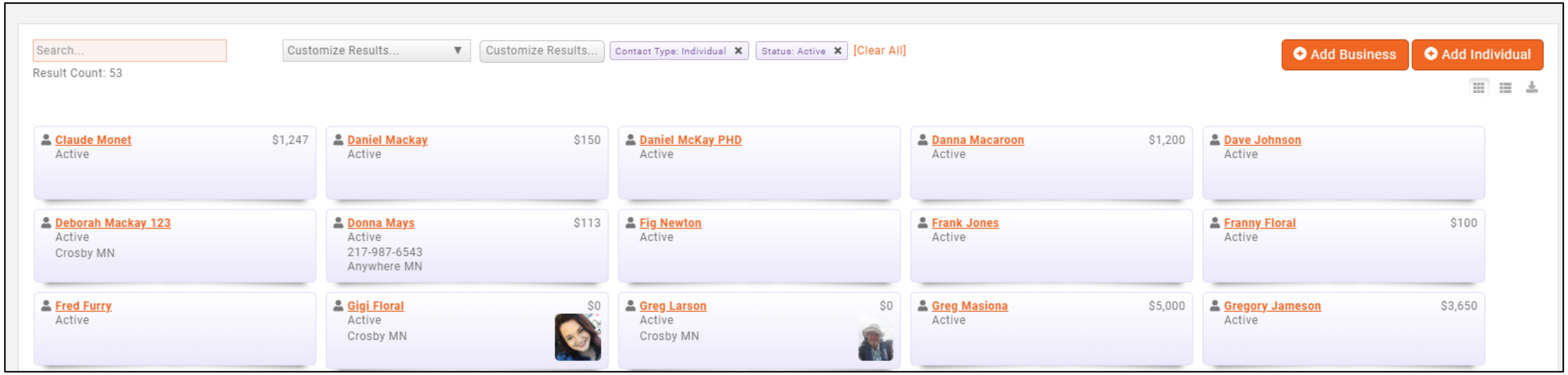
Info Hub Access

Reporting

Contact Management

GrowthZone has several integrated components and features to save you time and effort in managing your contacts

Easily view and manage all of the individuals and organizations in your database, including billing information, communications, and more



Contact Management Module

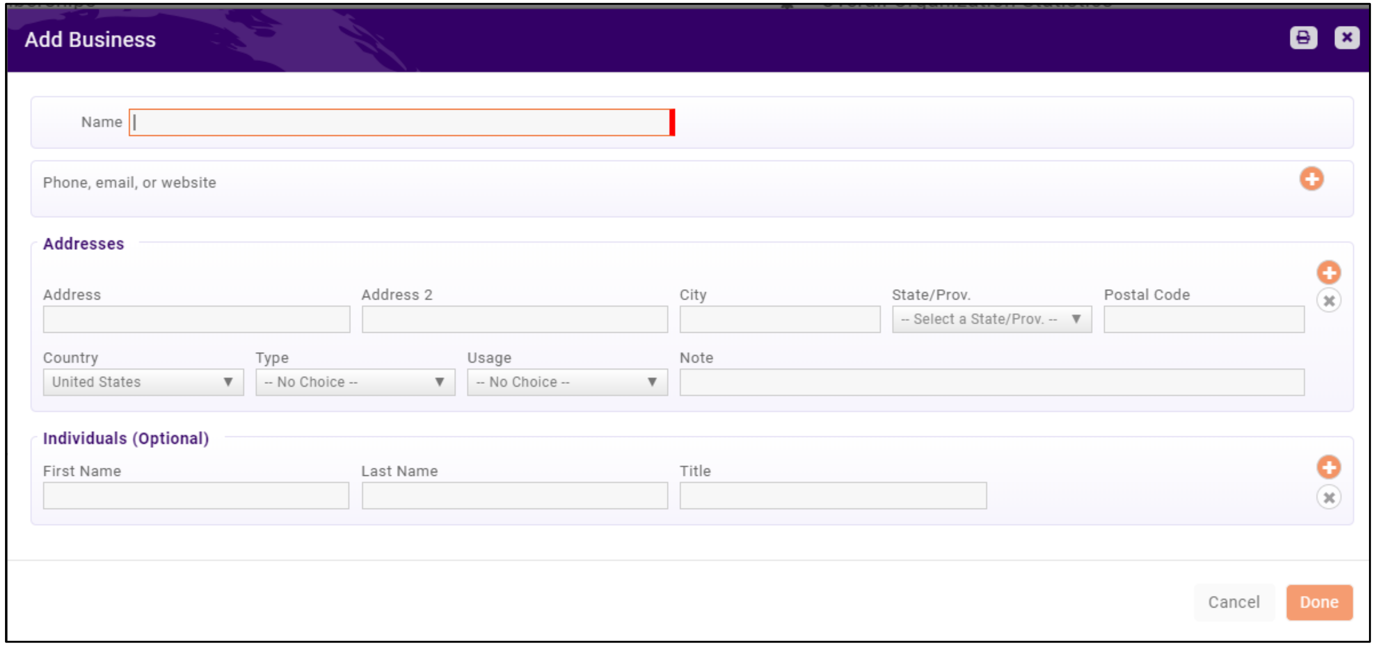
How Contacts Can Be Added

- 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
- 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

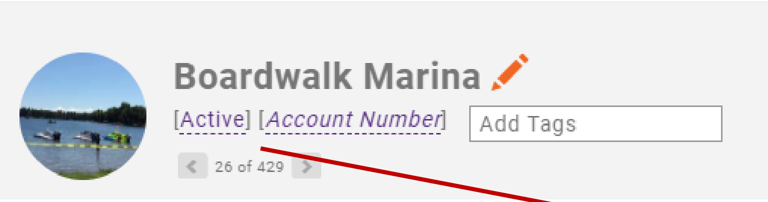
- Add Organization
- Add Individual

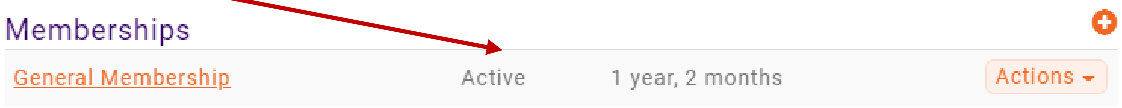


Add Contact

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





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

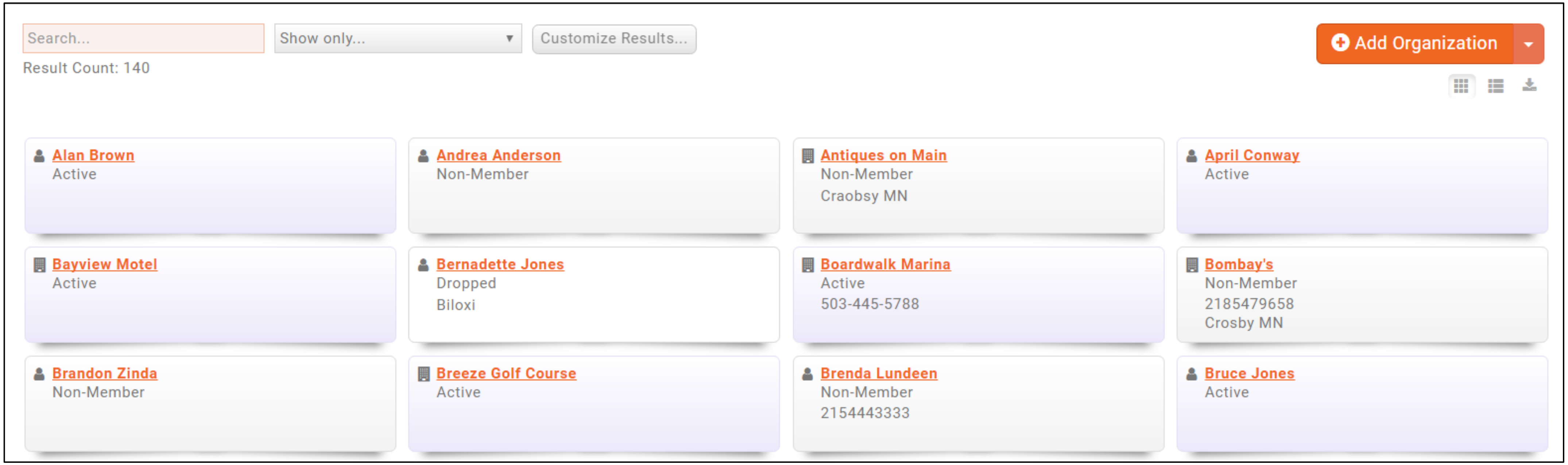
Searching for Contacts

Global Search

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

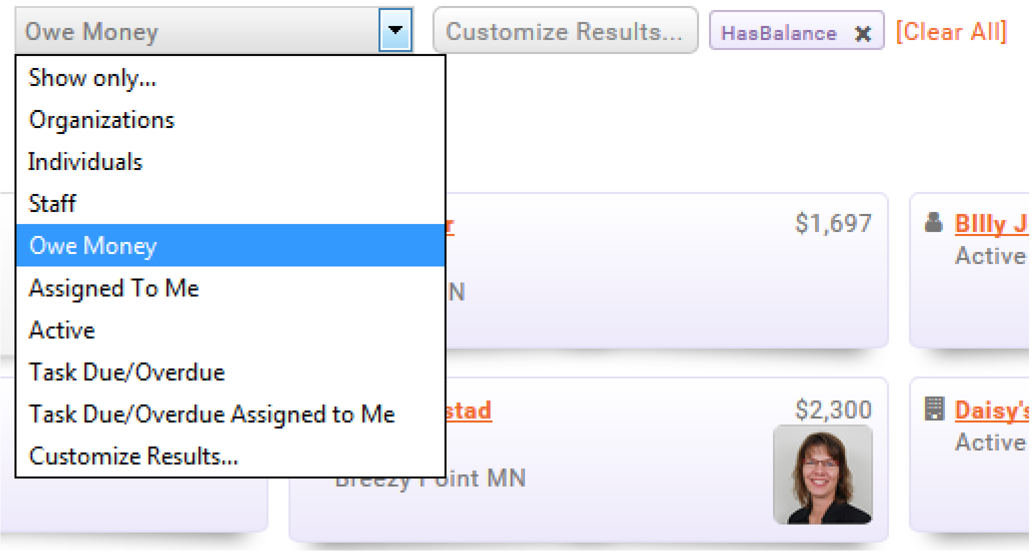
Searching for Contacts

Search within Contacts Module

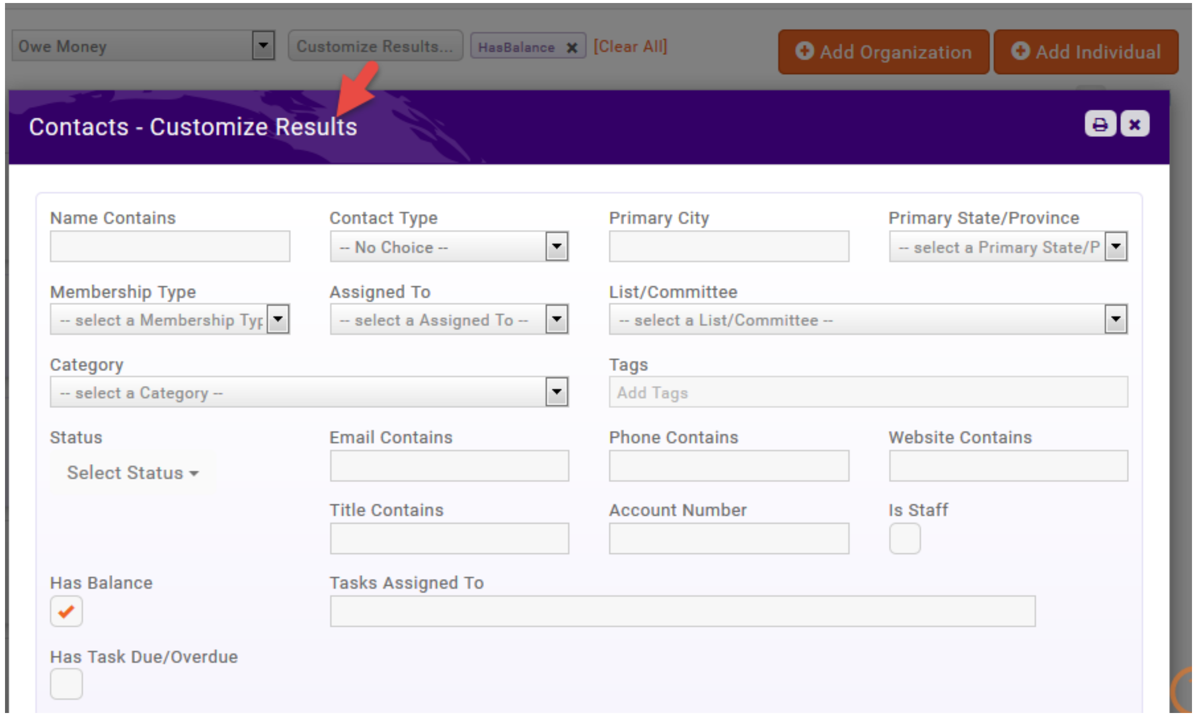


Searching for Contacts

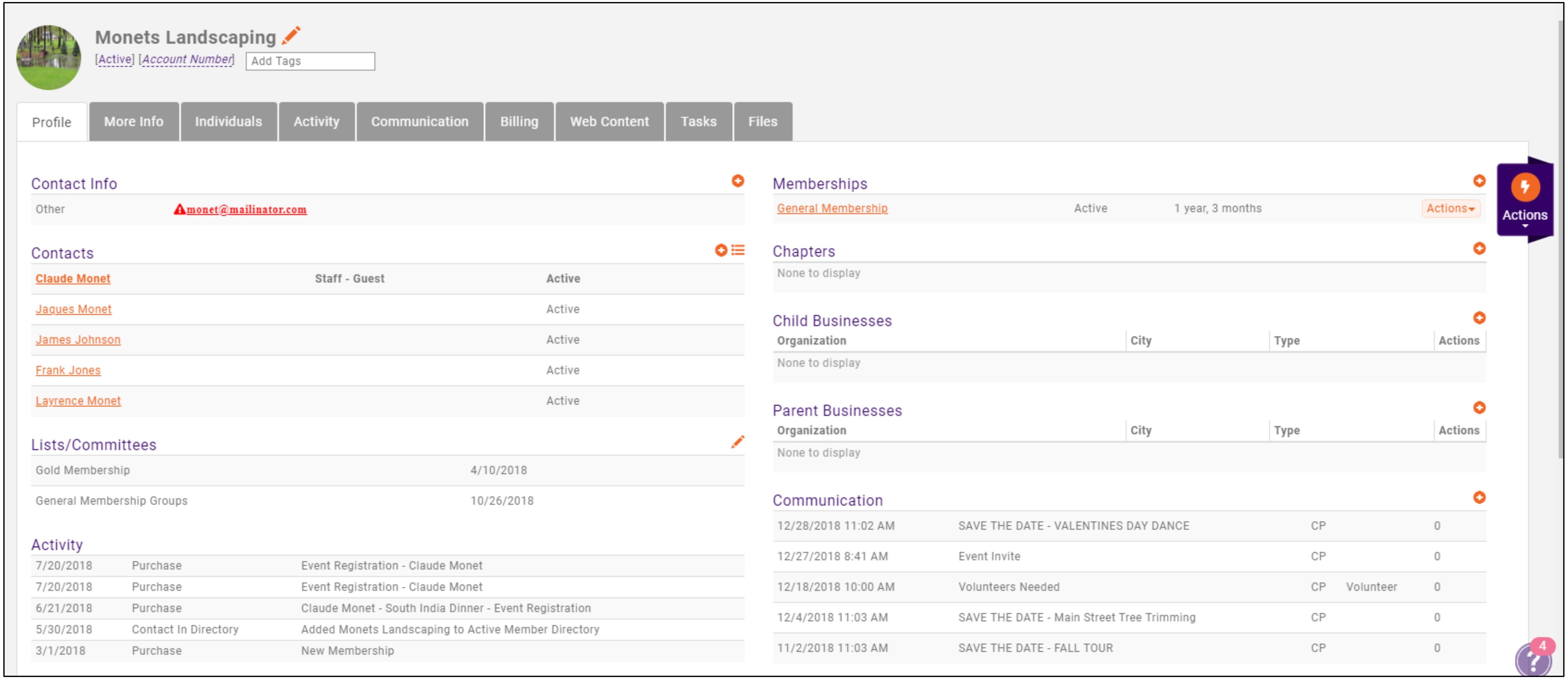
Show Only… (drop down list)



Customize Results button for advanced filters



Contact - Profile



Contact Profile

[Add Photo](#)

[Add Tags](#)

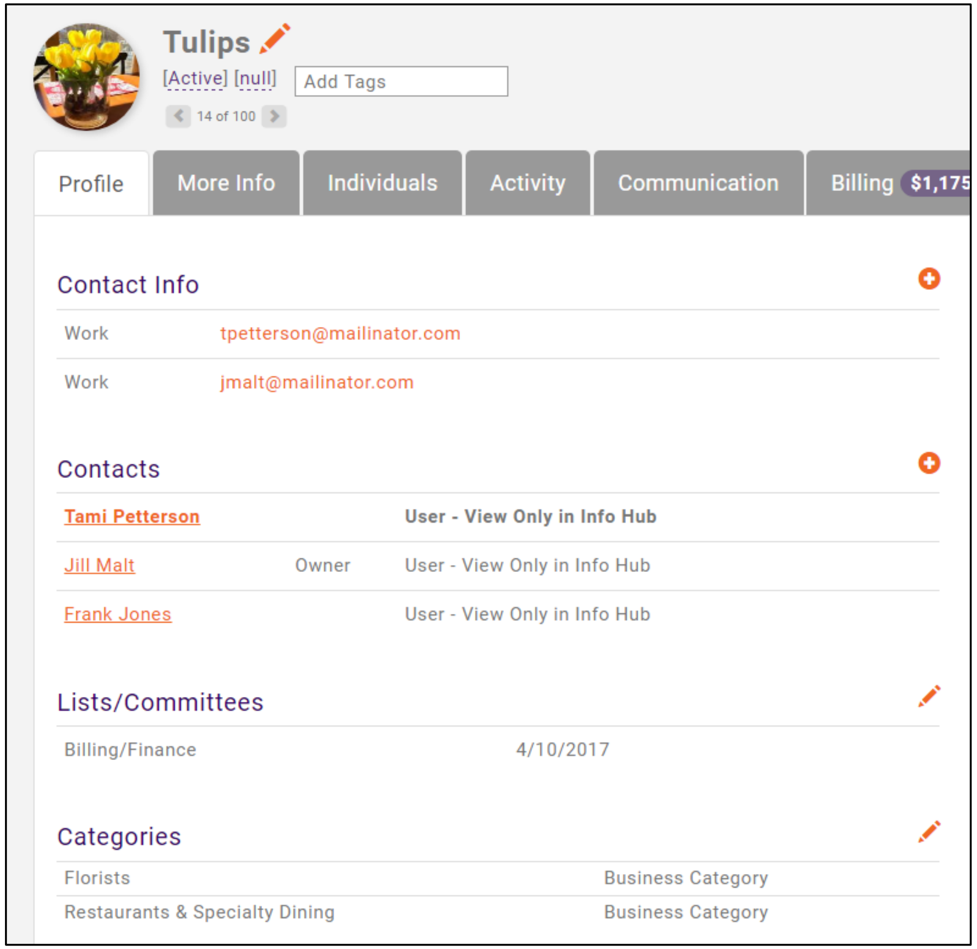
[Update Contact Info](#)

[Update Contacts](#)

[Update Lists & Committees](#)

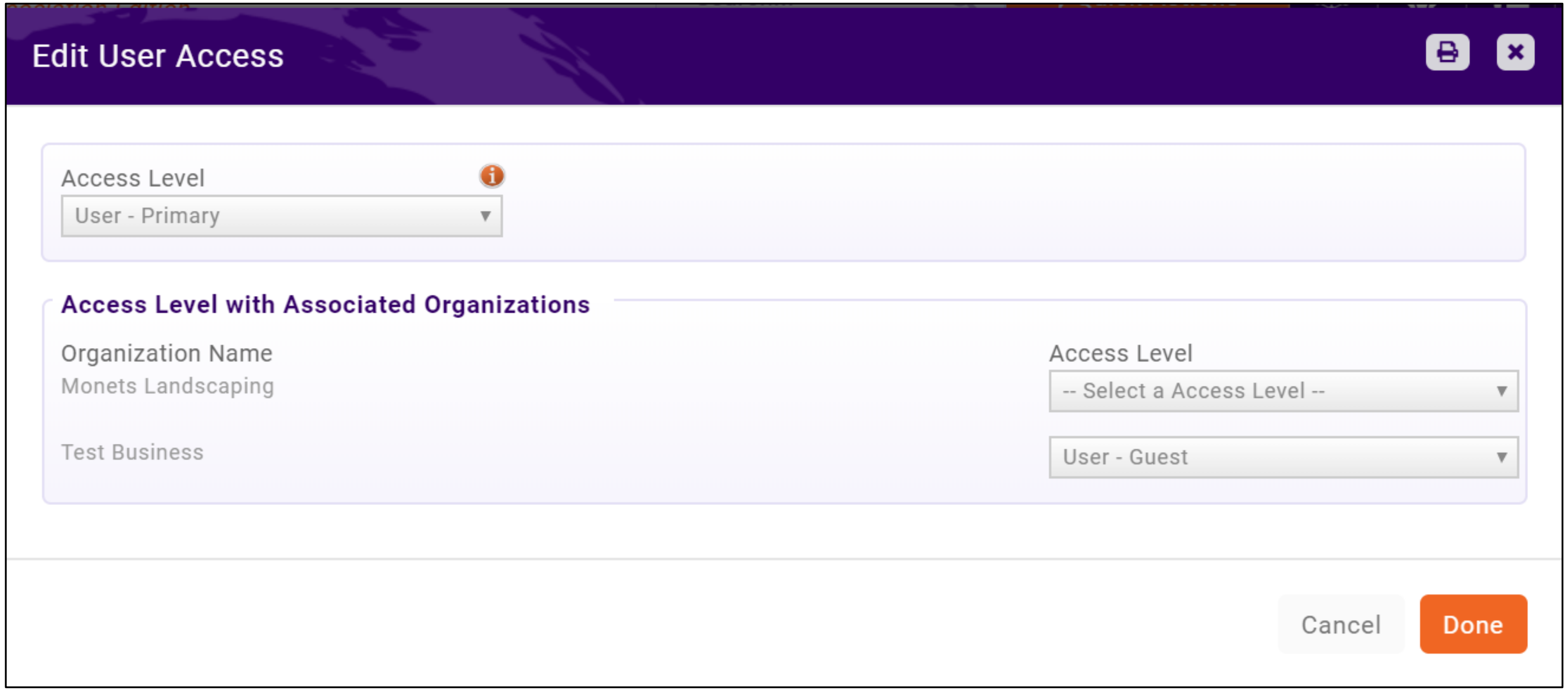
[Update Categories](#)

[Assign Staff](#)



Contact Info Hub Access

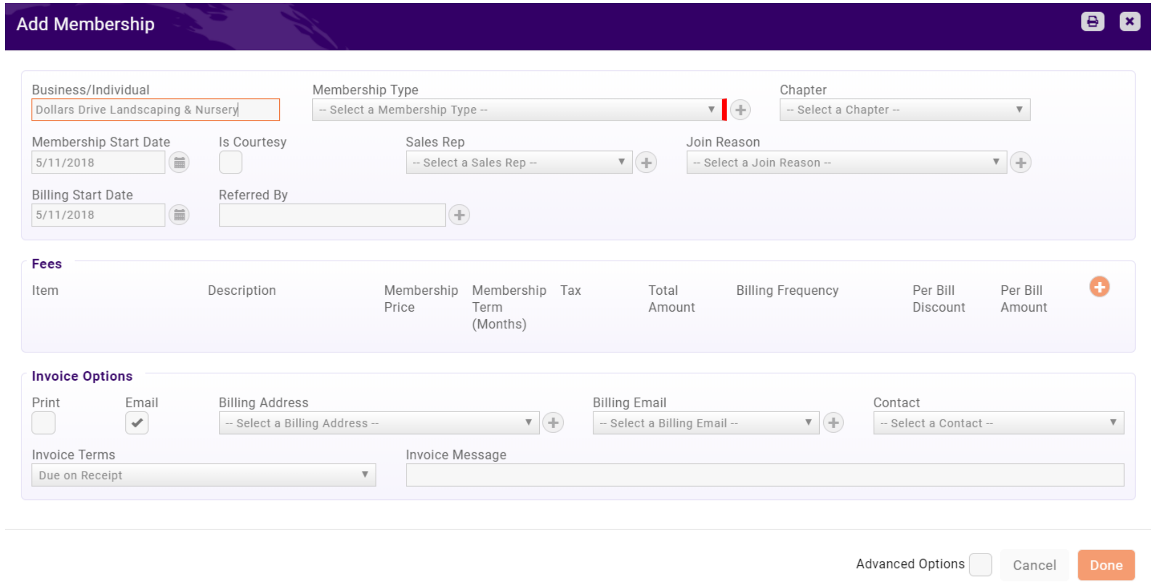
Setup Info Hub Access



Contact Membership

Add a Membership to a Contact

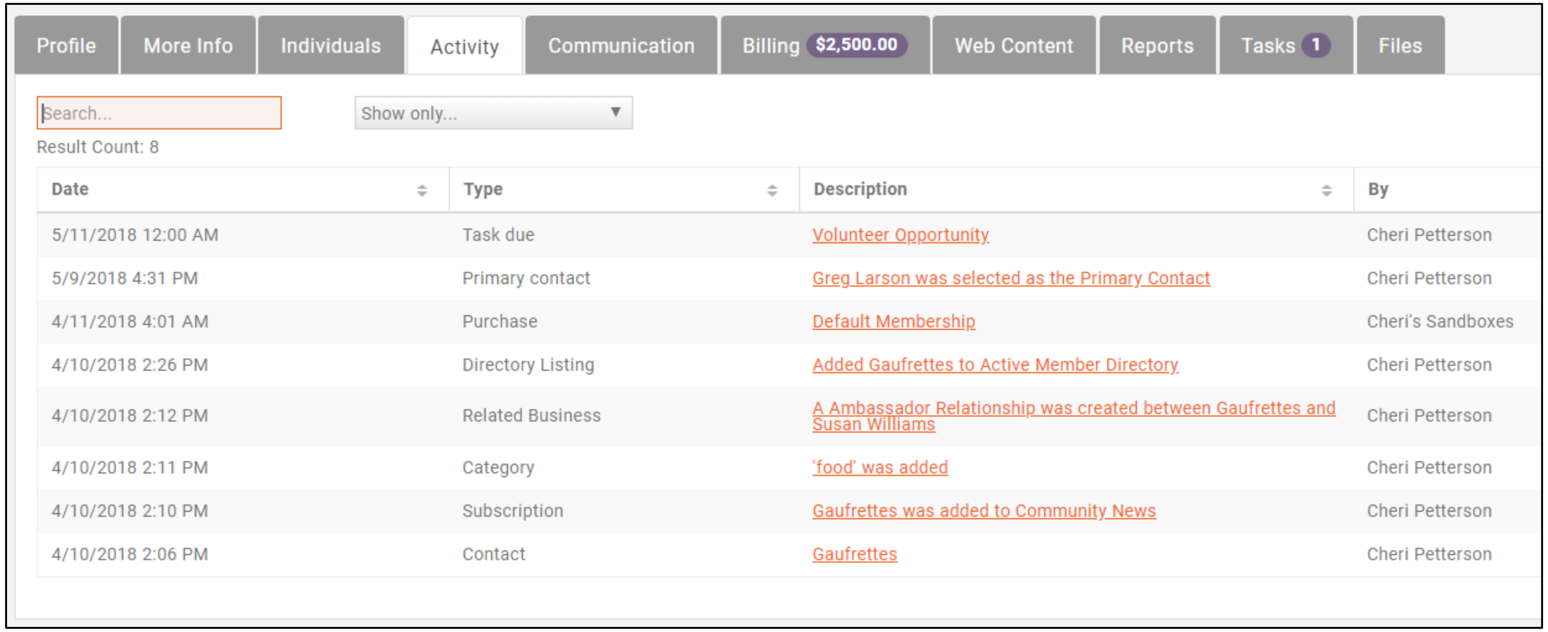
While most of your prospective members may apply on-line, you can also add members directly in the database



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

Search...

Show only...

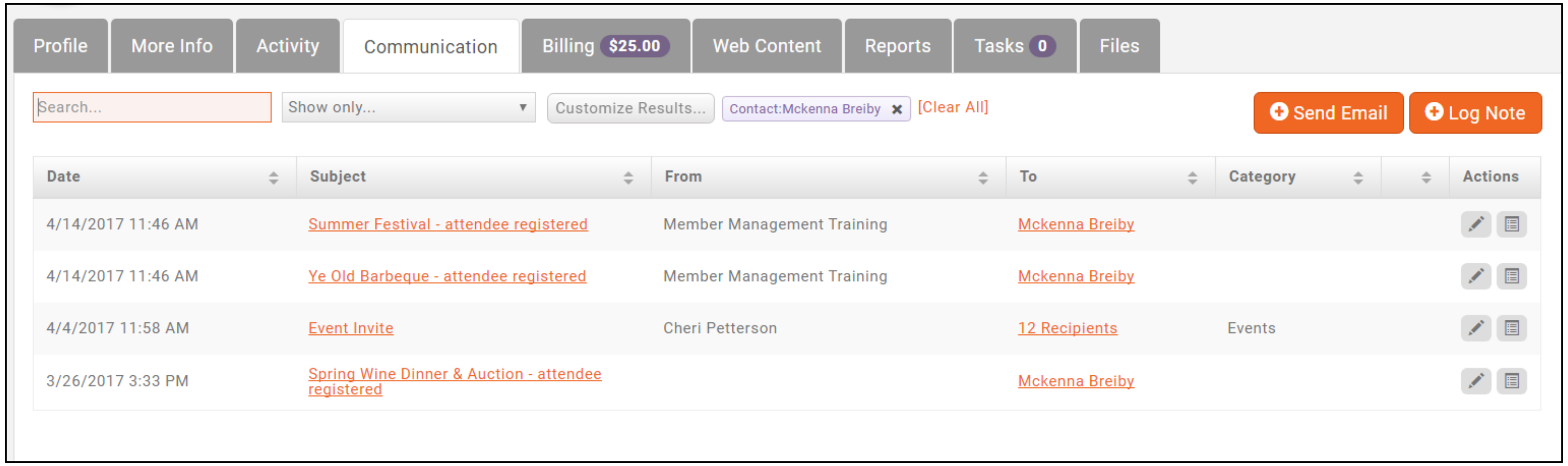
Result Count: 8

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

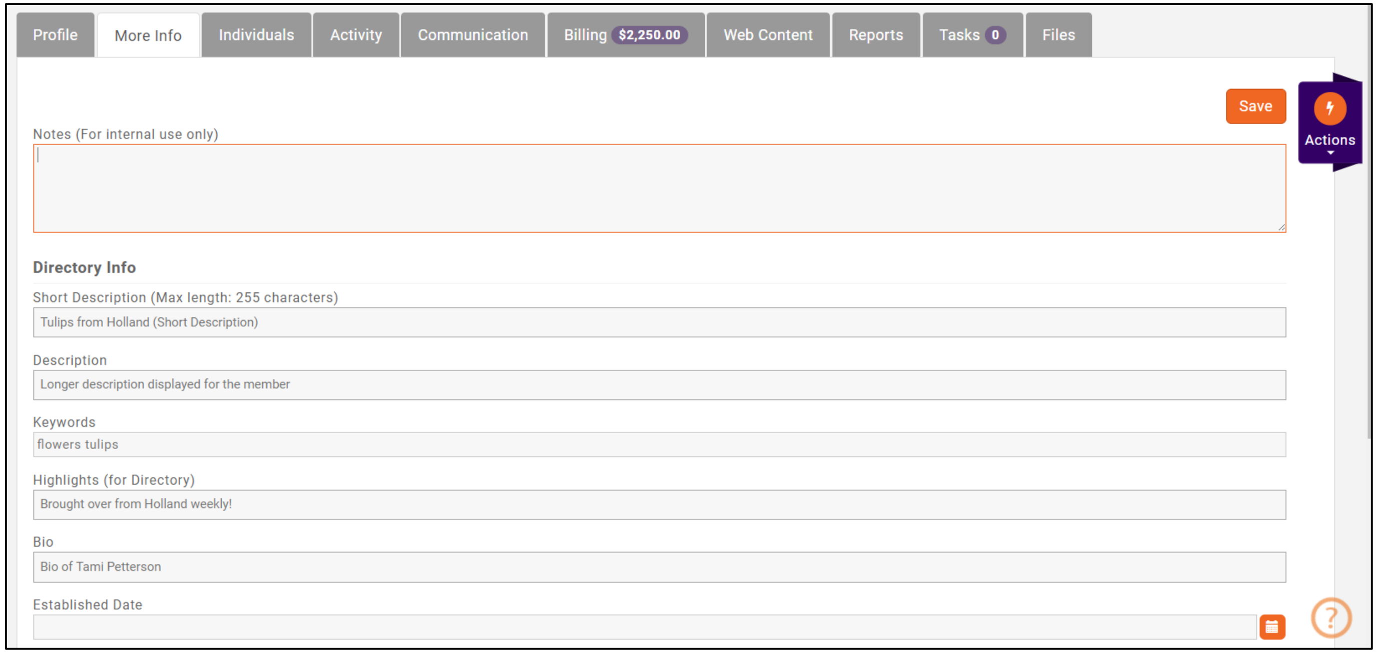
From here you can send emails and log notes/calls



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			

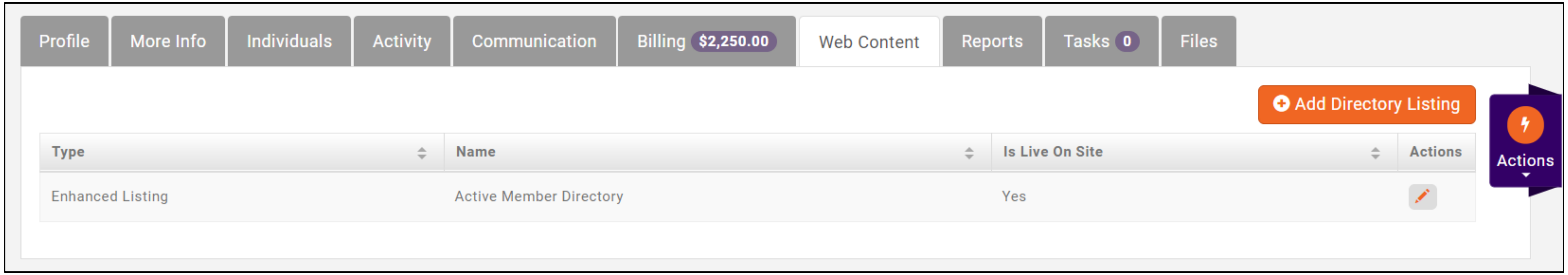
More Info

You can update the web display information for your new member on the More Info Tab



More Info/Web Content

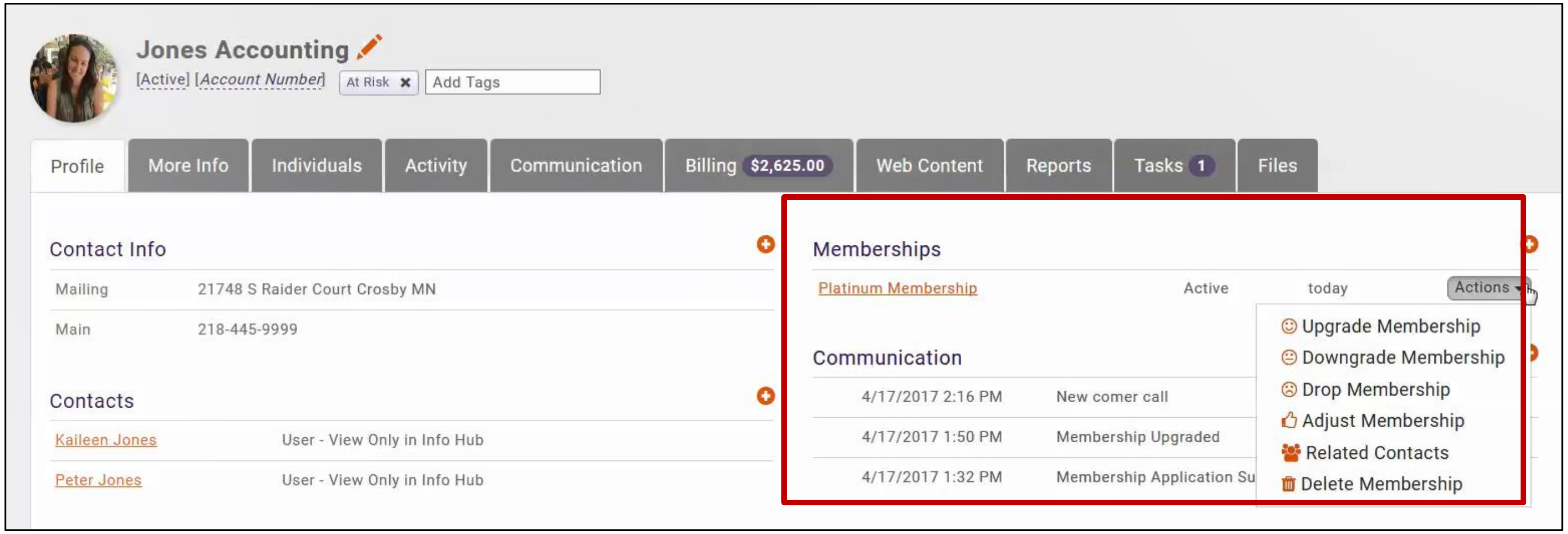
You can update the directory listing type on the Web Content Tab



Membership Changes

Manage Membership Changes

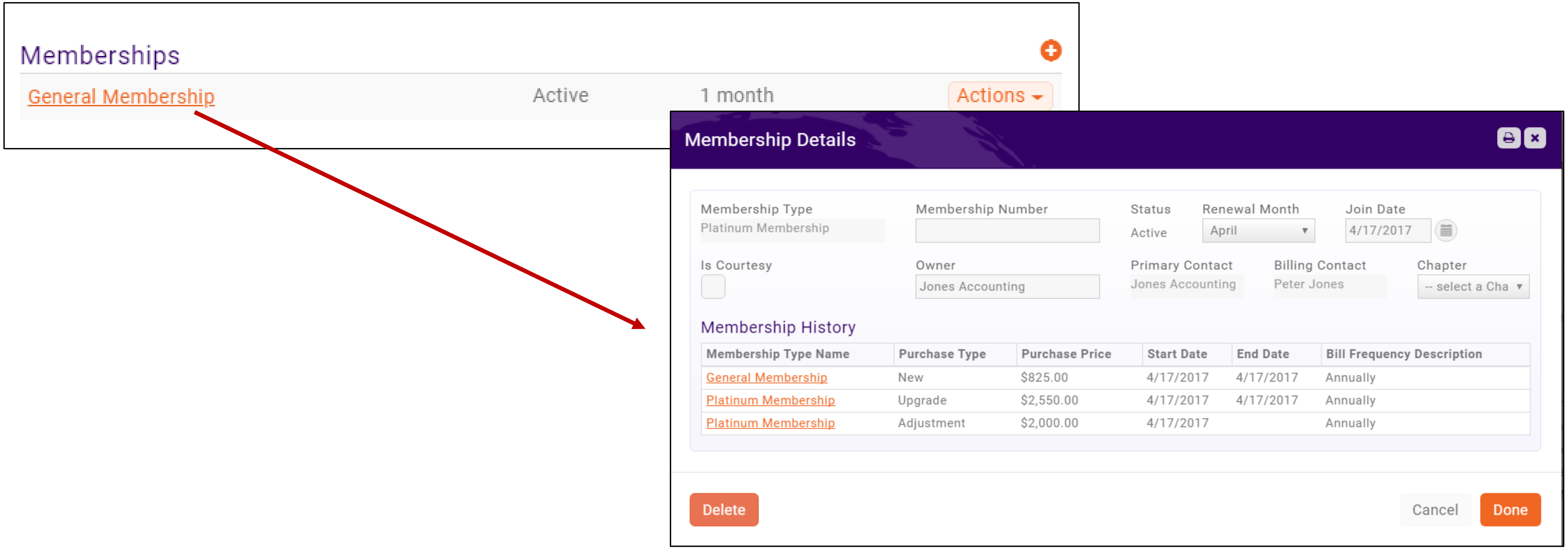
- Manage a contacts membership from their Profile tab



NOTE: if you upgrade or downgrade a membership – you will want to verify the recurring fees schedule on the Billing tab

Membership Details

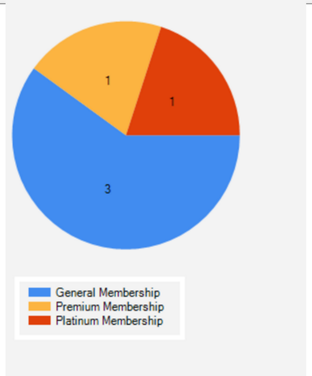
Clicking on the Contact's Membership on the profile tab will display details and history of changes.

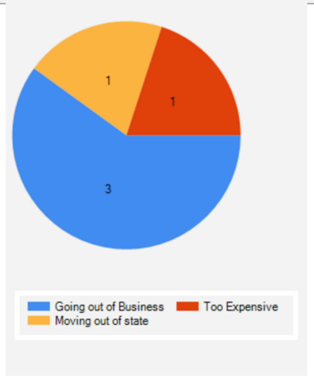


Contact/Membership Reports

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

Results





Contact Name	Default Email	Default Phone	Membership	Membership Start Date	Membership Status	Renewal Month	EndDate	Drop Reason	Anualized Amount
Exotic Floral Boutique	lacherie_2000@yahoo.com		General Membership	2/20/2017	Dropped	February	2/21/2017	Going out of Business	$1,200.00
Lacies Floral			Premium Membership	2/20/2017	Dropped	February	2/21/2017	Going out of Business	$1,200.00
Silver Casino			General Membership	2/21/2017	Dropped	February	4/17/2017	Moving out of state	$1,200.00
The Garage Museum	wharkens@mailinator.com		General Membership	2/23/2017	Dropped	February	4/17/2017	Too Expensive	$1,225.00
Rose's Florist	roses@mailinator.com	502-444-7777	Platinum Membership	2/28/2017	Dropped	February	4/7/2017	Going out of Business	$2,500.00
Count\Average\Totals	5								$7,325.00

Contact/Membership Reports (Examples)

Contacts Report: The **Contacts Report** provides you the flexibility to generate a list of your contacts based on a variety of different criteria, as well as custom filters

User Account Report: The **User Account Report** can be used by staff to find information such as:

- Which members don't have an account setup yet
- Which members have logged in recently to the Info Hub, and what their usernames are
- What access levels do members at a specific organization (with many employees) have
- Which members have recently created accounts (e.g. within the last week)

Contact/Membership Reports (Examples)

Membership Report: The **Membership Report** allows you to generate a list of all of your members based on membership type

Membership Change Report: The **Membership Chamber Report** provides you with a way to view and analyze membership type changes, as well a fee changes

Dropped Membership Report: The **Dropped Membership Report** allows you to generate a report of dropped members based on date range, membership type and sales person

Common Report Functions

Export Reports: All Reports may be exported to Excel or PDF

Email Reports: You can easily send report results via email

Add Report Contacts to a List/Committee: You can easily create a list from a report

Save a Report as a New Report: With all of the reports, you have the ability to apply custom filters. After customizing the report to suit your needs, you may save the report as a New Report. This will make it easy for you to run the report again in the future as your custom settings and filters will be saved

Save a report as a Favorite Report: If you frequently use the same report, you can save it as a favorite

Questions?