

# Managing your Contacts & Members - The Basics

# Agenda

## Contact Management module

- Adding new contacts
- Updating Contact information

## Managing your Memberships

- Adding Membership
- Upgrading, Downgrading, Dropping

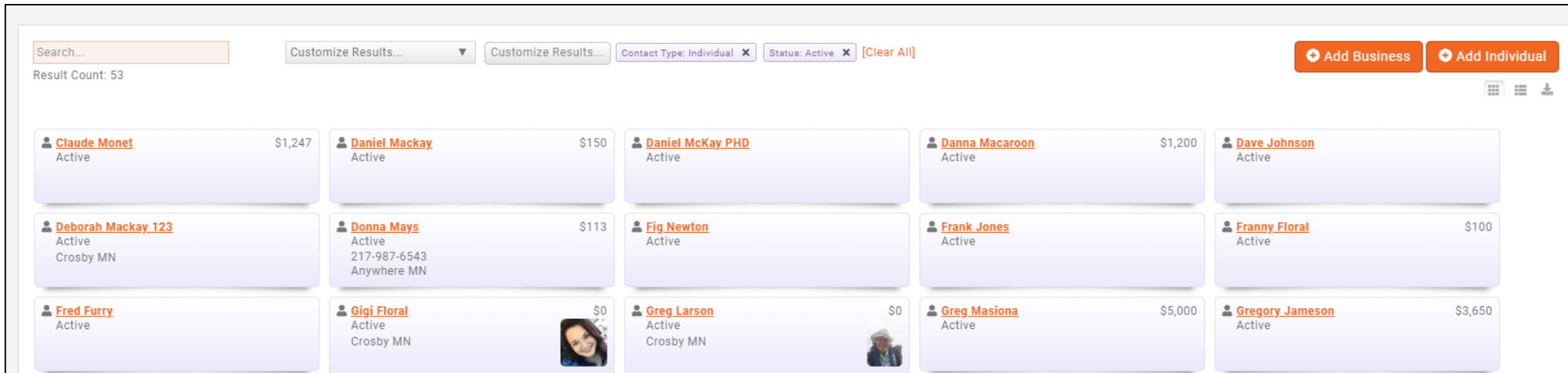
## Info Hub Access

## 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



The screenshot displays a contact management interface with the following elements:

- Search and Filter:** A search bar, two "Customize Results..." dropdowns, and filter buttons for "Contact Type: Individual" and "Status: Active". A "[Clear All]" link is also present.
- Buttons:** "Add Business" and "Add Individual" buttons in the top right corner.
- Result Count:** "Result Count: 53" is shown in the top left.
- Contact Cards:** A grid of 12 contact cards, each showing a name, status, and a value. Some cards include profile pictures.

Name	Status	Value	Location/Info
Claude Monet	Active	\$1,247	
Daniel Mackay	Active	\$150	
Daniel McKay PHD	Active		
Danna Macaroon	Active	\$1,200	
Dave Johnson	Active		
Deborah Mackay 123	Active		Crosby MN
Donna Mays	Active	\$113	217-987-6543 Anywhere MN
Fig Newton	Active		
Frank Jones	Active		
Franny Floral	Active	\$100	
Fred Furry	Active		
Gigi Floral	Active	\$0	Crosby MN
Greg Larson	Active	\$0	Crosby MN
Greg Masiona	Active	\$5,000	
Gregory Jameson	Active	\$3,650	

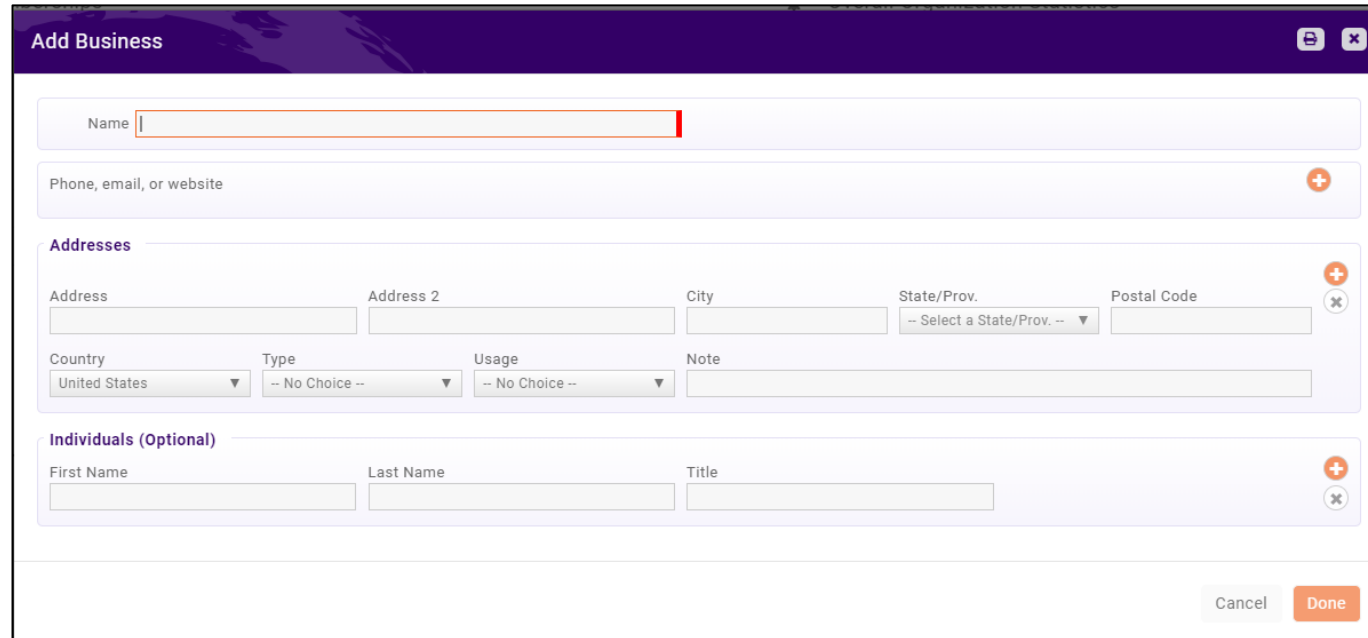
## How Contacts Can Be Added

- 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](#)



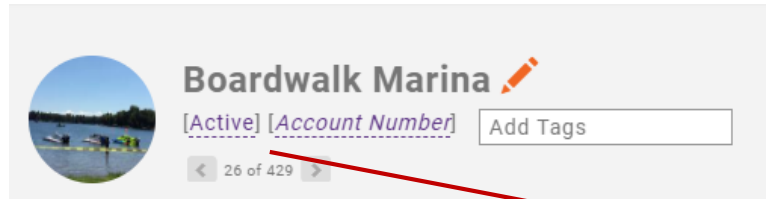
The screenshot shows a web form titled "Add Business" with a dark purple header. The form is organized into several sections:

- 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".

## 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



Memberships <span>+</span>			
<a href="#">General Membership</a>	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

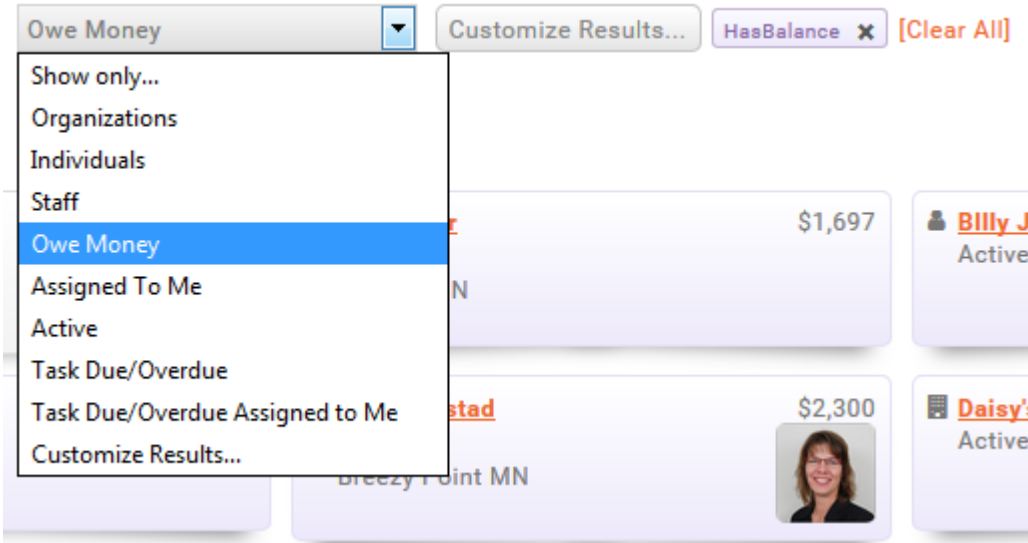
## Search within Contacts Module

Result Count: 140

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

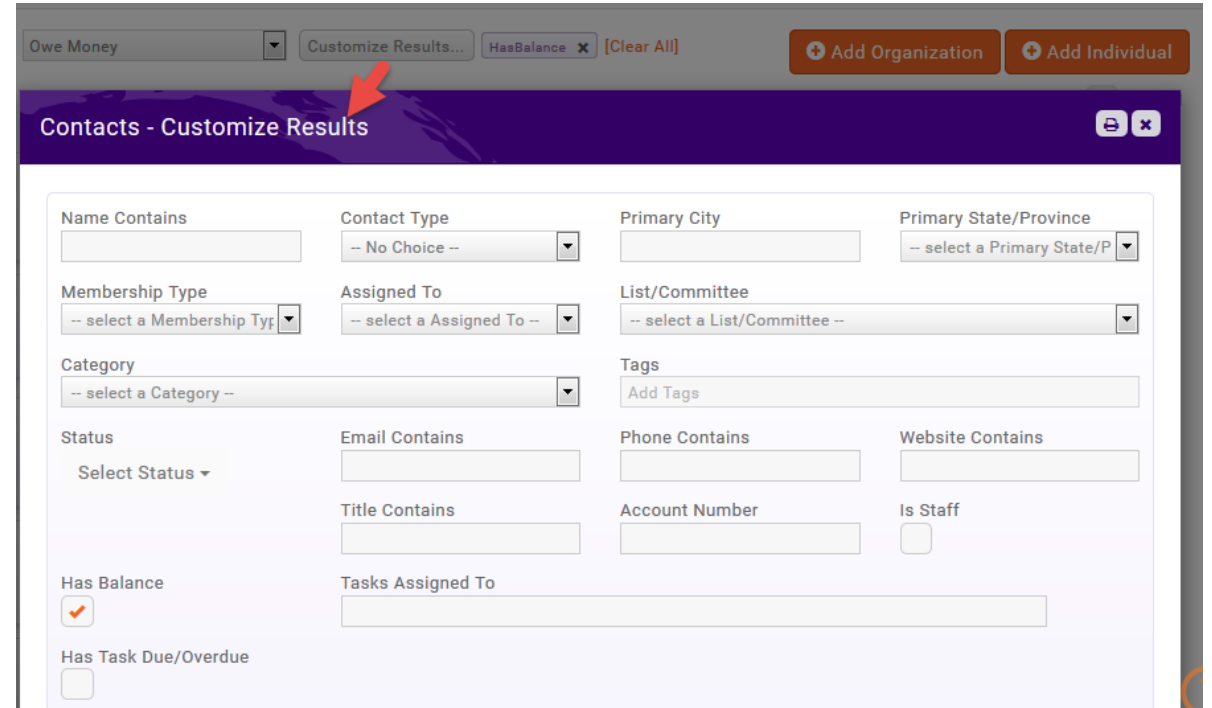
# Searching for Contacts

## Show Only... (drop down list)



The screenshot shows a search interface with a dropdown menu open. The dropdown menu is titled "Show only..." and lists 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, and status. A "Customize Results..." button is visible at the top of the search area.


## 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 search area above. The dialog box has a title bar "Contacts - Customize Results" and a close button. It contains various filter fields:

- Name Contains:
- Contact Type:
- Primary City:
- Primary State/Province:
- Membership Type:
- Assigned To:
- List/Committee:
- Category:
- Tags:
- Status:
- Email Contains:
- Phone Contains:
- Website Contains:
- Title Contains:
- Account Number:
- Is Staff:
- Has Balance:
- Tasks Assigned To:
- Has Task Due/Overdue:

# Contact - Profile



## Monets Landscaping

[Active] [Account Number]

Profile

More Info

Individuals

Activity

Communication

Billing

Web Content

Tasks

Files

### Contact Info

Other [monet@mailinator.com](mailto:monet@mailinator.com)

### Contacts

<a href="#">Claude Monet</a>	Staff - Guest	Active
<a href="#">Jaques Monet</a>		Active
<a href="#">James Johnson</a>		Active
<a href="#">Frank Jones</a>		Active
<a href="#">Layrence Monet</a>		Active

### Lists/Committees

Gold Membership	4/10/2018
General Membership Groups	10/26/2018

### Activity

7/20/2018	Purchase	Event Registration - Claude Monet
7/20/2018	Purchase	Event Registration - Claude Monet
6/21/2018	Purchase	Claude Monet - South India Dinner - Event Registration
5/30/2018	Contact In Directory	Added Monets Landscaping to Active Member Directory
3/1/2018	Purchase	New Membership

### Memberships

<a href="#">General Membership</a>	Active	1 year, 3 months	<a href="#">Actions</a>
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### Chapters

None to display

### Child Businesses


Organization	City	Type	Actions
None to display			


### Parent Businesses

Organization	City	Type	Actions
None to display			

### Communication

12/28/2018 11:02 AM	SAVE THE DATE - VALENTINES DAY DANCE	CP	0
12/27/2018 8:41 AM	Event Invite	CP	0
12/18/2018 10:00 AM	Volunteers Needed	CP Volunteer	0
12/4/2018 11:03 AM	SAVE THE DATE - Main Street Tree Trimming	CP	0
11/2/2018 11:03 AM	SAVE THE DATE - FALL TOUR	CP	0

  
**Actions**

  
4

# Contact Profile

Add Photo

Add Tags

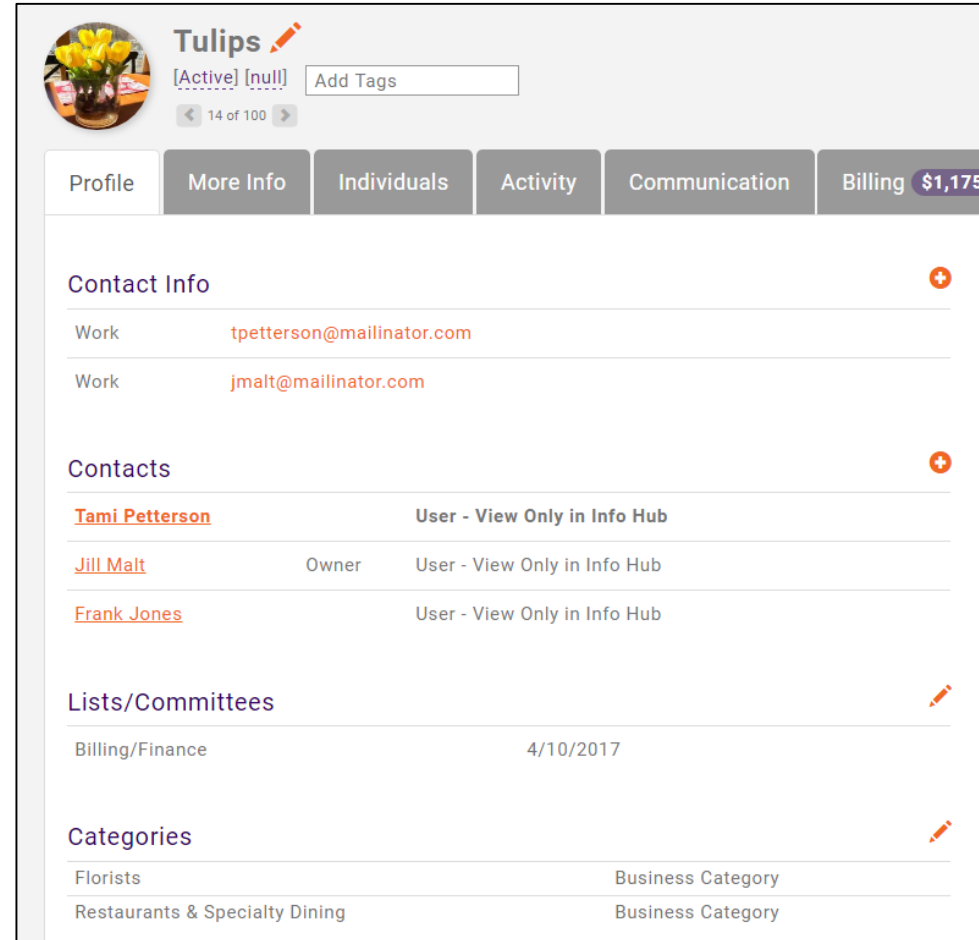
Update Contact Info

Update Contacts

Update Lists & Committees

Update Categories

Assign Staff



The screenshot shows a contact profile for 'Tulips'. At the top, there is a profile picture of yellow tulips, the name 'Tulips' with an edit icon, and status '[Active] [null]' with an 'Add Tags' input field. Below this is a navigation bar with tabs: Profile (selected), More Info, Individuals, Activity, Communication, and Billing (\$1,175). The main content area is divided into sections: 'Contact Info' with two work email addresses (tpetterson@mailinator.com and jmalt@mailinator.com), 'Contacts' with three users (Tami Petterson, Jill Malt, Frank Jones) and their roles, 'Lists/Committees' with one entry (Billing/Finance dated 4/10/2017), and 'Categories' with two entries (Florists and Restaurants & Specialty Dining, both as Business Categories). Each section has an edit icon.

# 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
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#### 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

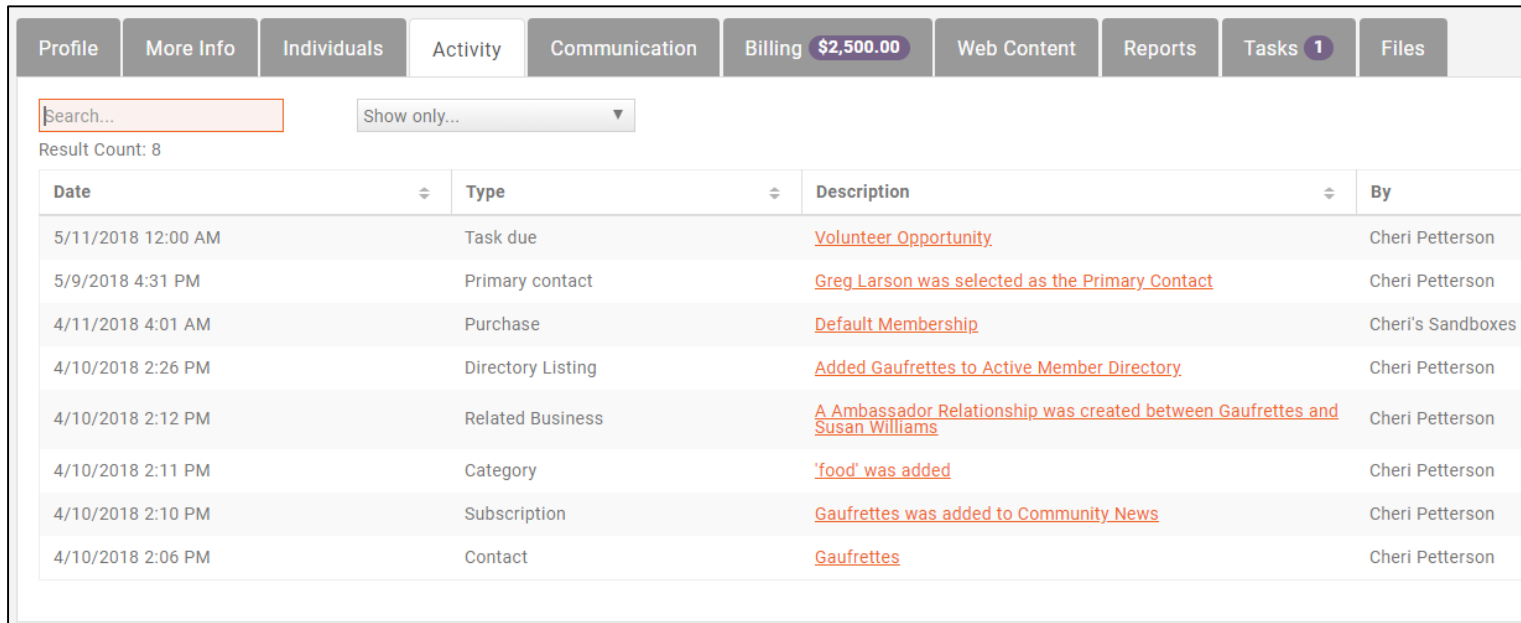
Invoice Message: +

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.



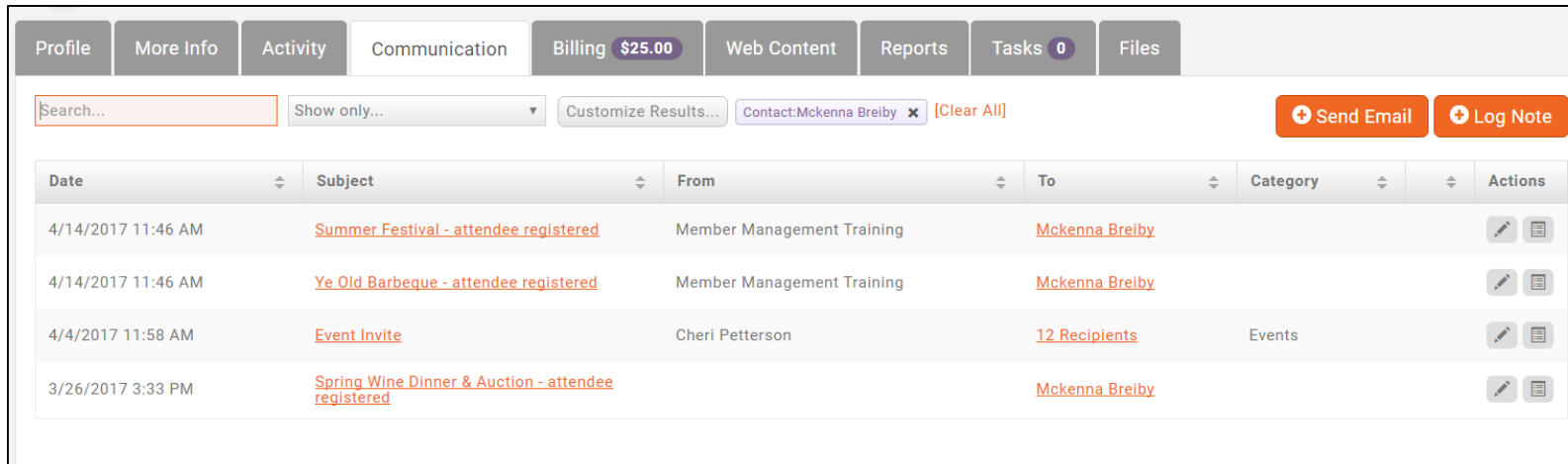
The screenshot shows the 'Activity' tab in the GrowthZone software. The interface includes a navigation bar with tabs for Profile, More Info, Individuals, Activity (selected), Communication, Billing (\$2,500.00), Web Content, Reports, Tasks (1), and Files. Below the navigation bar is a search field and a 'Show only...' dropdown menu. The main content area displays a table with 8 activity records. The table has columns for Date, Type, Description, and By. The activity records are as follows:









Date	Type	Description	By
5/11/2018 12:00 AM	Task due	<a href="#">Volunteer Opportunity</a>	Cheri Petterson
5/9/2018 4:31 PM	Primary contact	<a href="#">Greg Larson was selected as the Primary Contact</a>	Cheri Petterson
4/11/2018 4:01 AM	Purchase	<a href="#">Default Membership</a>	Cheri's Sandboxes
4/10/2018 2:26 PM	Directory Listing	<a href="#">Added Gaufrettes to Active Member Directory</a>	Cheri Petterson
4/10/2018 2:12 PM	Related Business	<a href="#">A Ambassador Relationship was created between Gaufrettes and Susan Williams</a>	Cheri Petterson
4/10/2018 2:11 PM	Category	<a href="#">'food' was added</a>	Cheri Petterson
4/10/2018 2:10 PM	Subscription	<a href="#">Gaufrettes was added to Community News</a>	Cheri Petterson
4/10/2018 2:06 PM	Contact	<a href="#">Gaufrettes</a>	Cheri Petterson

# Contact Communications

All communications with a contact are logged on the contact's **Communications** tab

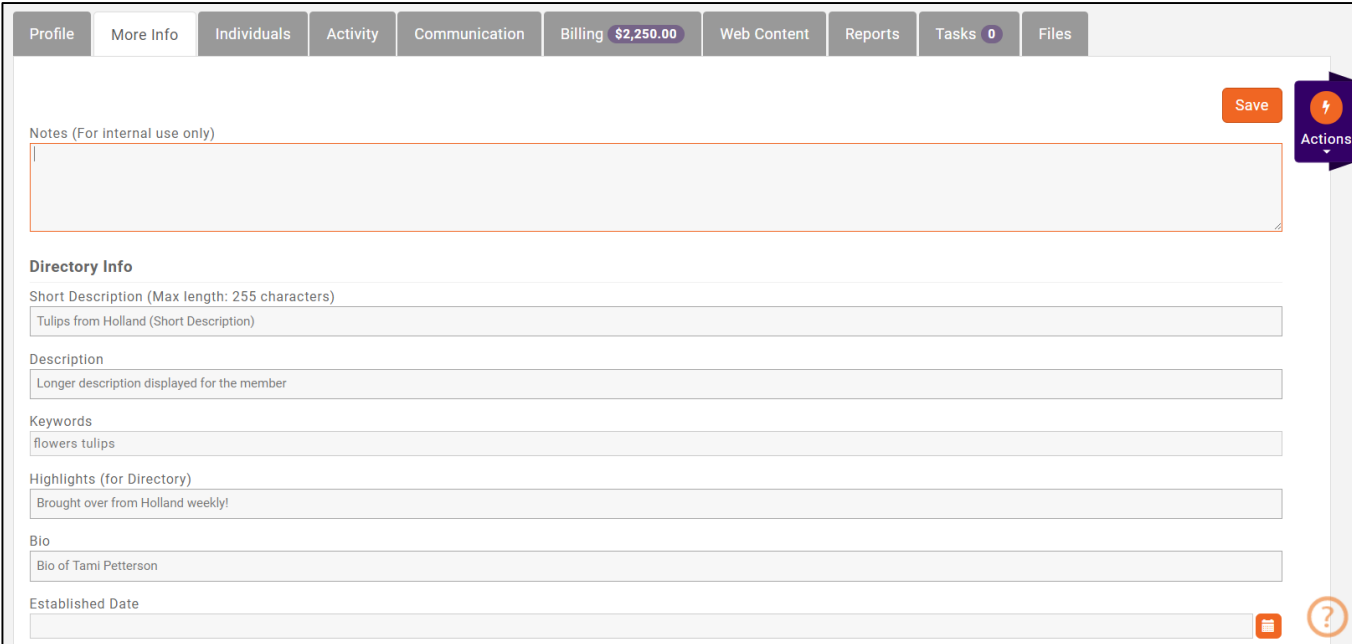
From here you can send emails and log notes/calls



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



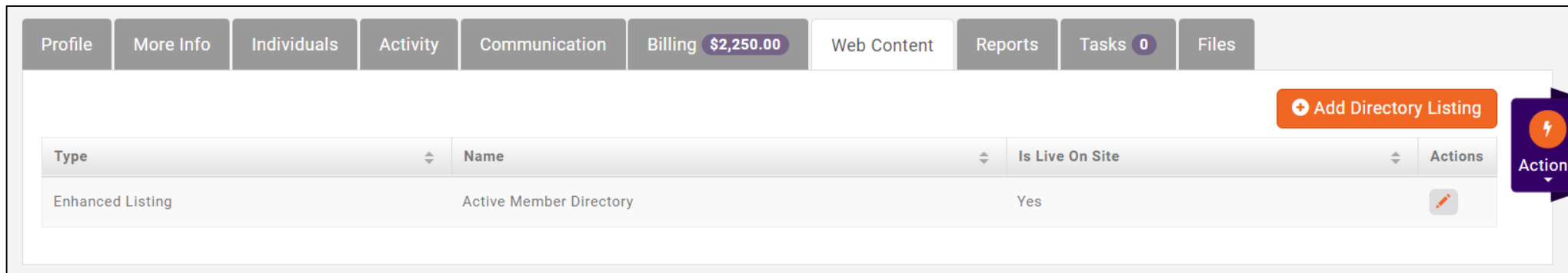
You can update the web display information for your new member on the More Info Tab




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 fields for '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'. A 'Save' button and a question mark icon are located at the bottom right of the form.

# More Info/Web Content

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



The screenshot shows a software interface with a navigation bar at the top containing tabs: Profile, More Info, Individuals, Activity, Communication, Billing (\$2,250.00), Web Content (selected), Reports, Tasks (0), and Files. Below the navigation bar is a table with the following data:

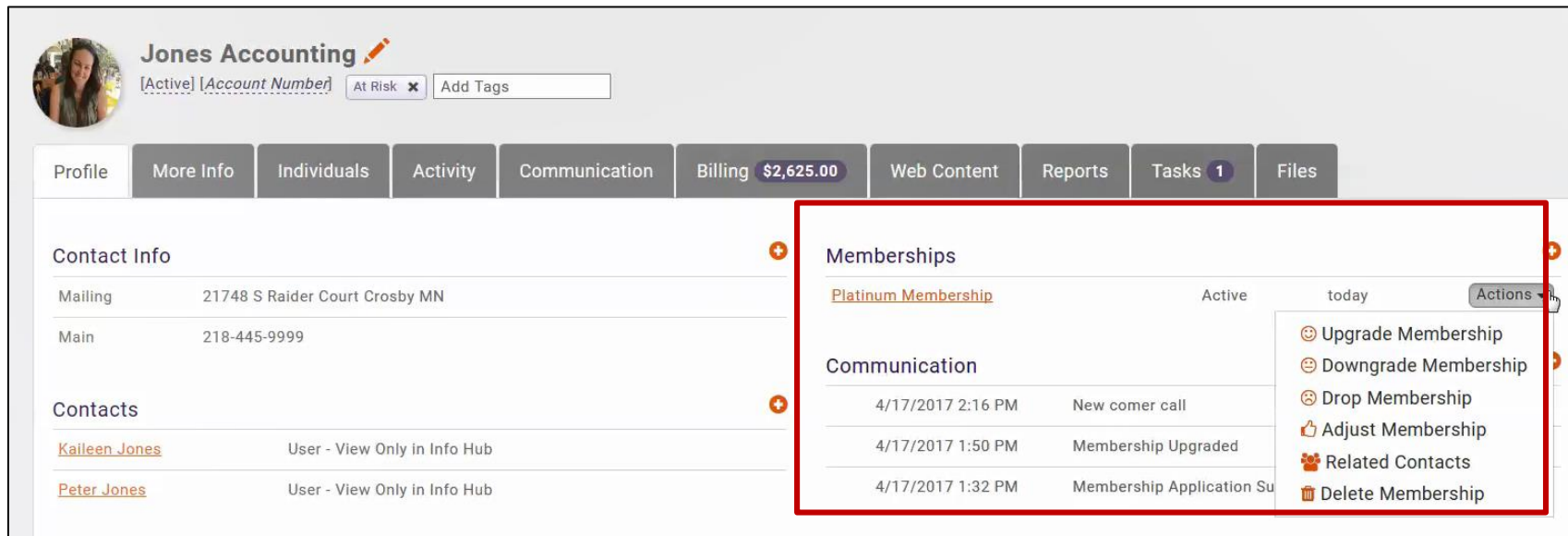
Type	Name	Is Live On Site	Actions
Enhanced Listing	Active Member Directory	Yes	

Additional UI elements include an orange button labeled '+ Add Directory Listing' and a purple 'Actions' button with a lightning bolt icon on the right side of the table.

# Membership Changes

## Manage Membership Changes

- Manage a contacts membership from their Profile tab



The screenshot displays the profile for 'Jones Accounting'. The 'Billing' tab is active, showing a balance of \$2,625.00. The 'Memberships' section is highlighted with a red box, showing a 'Platinum Membership' that is 'Active' and expires 'today'. An 'Actions' dropdown menu is open, listing options: Upgrade Membership, Downgrade Membership, Drop Membership, Adjust Membership, Related Contacts, and Delete Membership. The 'Communication' section below shows three entries from 4/17/2017: 'New comer call', 'Membership Upgraded', and 'Membership Application Su'.

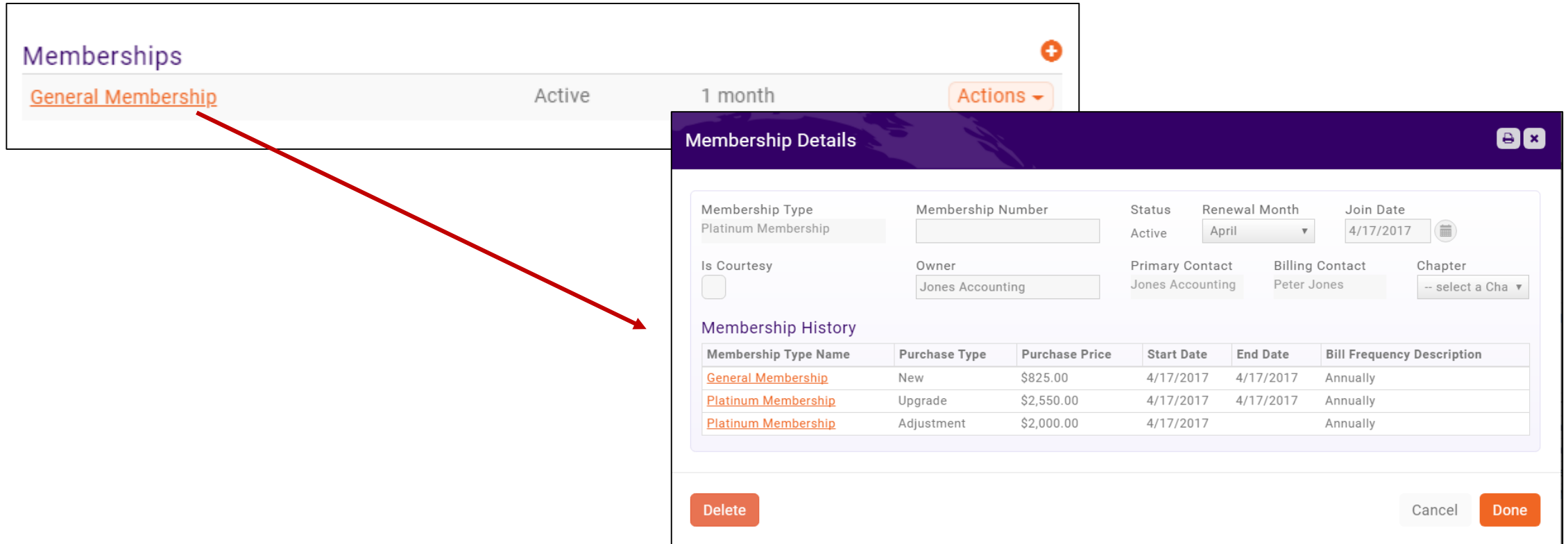
Membership	Status	Expires	Actions
Platinum Membership	Active	today	Upgrade Membership, Downgrade Membership, Drop Membership, Adjust Membership, Related Contacts, Delete Membership

Date	Time	Message
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 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.



Memberships

[General Membership](#) Active 1 month Actions

### Membership Details

Membership Type: Platinum Membership  
Membership Number:   
Status: Active  
Renewal Month: April  
Join Date: 4/17/2017

Is Courtesy:   
Owner: Jones Accounting  
Primary Contact: Jones Accounting  
Billing Contact: Peter Jones  
Chapter: -- select a Cha

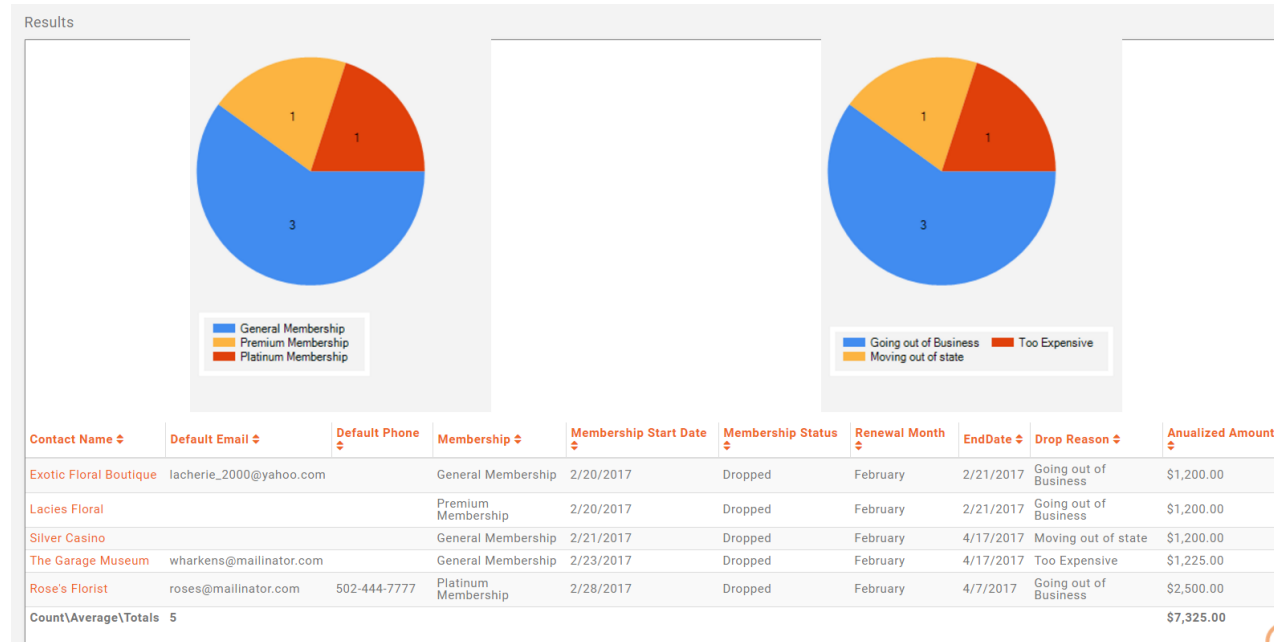
#### Membership History

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

Delete Cancel Done

# 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



# 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?