

GrowthZone - Getting Started



Agenda:

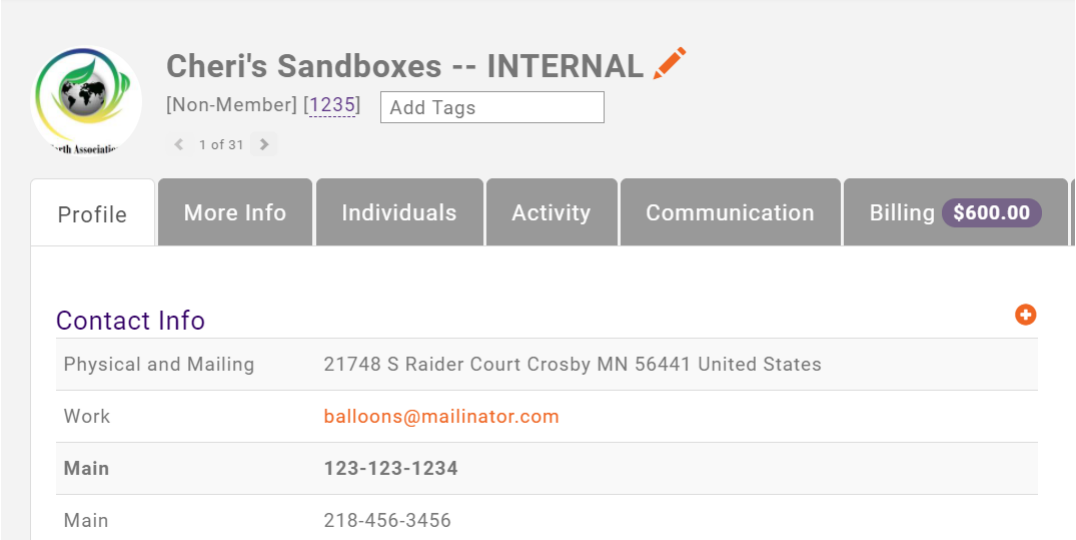
- Configuring Organization Information
- User Permissions/Access
- Defining Categories & Lists
- Setting Up Billing
 - Chart of Accounts
 - Goods & Services
- Setup Membership Types
- Setting up Info Hub

Review your Organization Information

When your database is first installed, your organization is added as a contact with non-member status in the database.

Review the contact information to ensure all address information and email are correct. The data populated is the information provided to GrowthZone initially, and you may edit as needed

WIKI: [Review Your Organization Information](#)



The screenshot shows a contact profile for "Cheri's Sandboxes -- INTERNAL". The profile includes a logo, a status of "[Non-Member] [1235]", and an "Add Tags" button. Below the header are tabs for "Profile", "More Info", "Individuals", "Activity", "Communication", and "Billing \$600.00". The "Contact Info" section is expanded, showing a table of contact details.

Contact Info	
Physical and Mailing	21748 S Raider Court Crosby MN 56441 United States
Work	balloons@mailinator.com
Main	123-123-1234
Main	218-456-3456

User Permissions/Access

Access to the database and to the Info Hub are "access level-driven". A staff or members may only view, edit, delete and/or create based on the Access Level they have been given

WIKI: [Setup Use Access Levels & Permission](#)

Access Levels drive what functions your staff will be able to perform in the database. The system is populated with default access levels that you can use as designed or customize to suit your business needs














Name	Access Level Type	Description	Users
Staff - Admin	Staff	Full Admin Access	13
Staff - Guest	Staff	View Only	1
Staff - Standard	Staff	Full Editing; View Only Finance	<No Users>
Staff - Finance	Staff	Full Editing; Full Finance	<No Users>
User - Guest	User	View Only in Hub	150
User - Standard	User	Create/Edit in Hub; No Delete	62
User - Primary	User	Full Control in Hub	68

Setup User Credentials

Each member of your staff who will need access to the database will need to be provided with login credentials

[Back to Setup](#)

Search... Show only... Customize Results... [Add](#) [Reassign Staff](#)

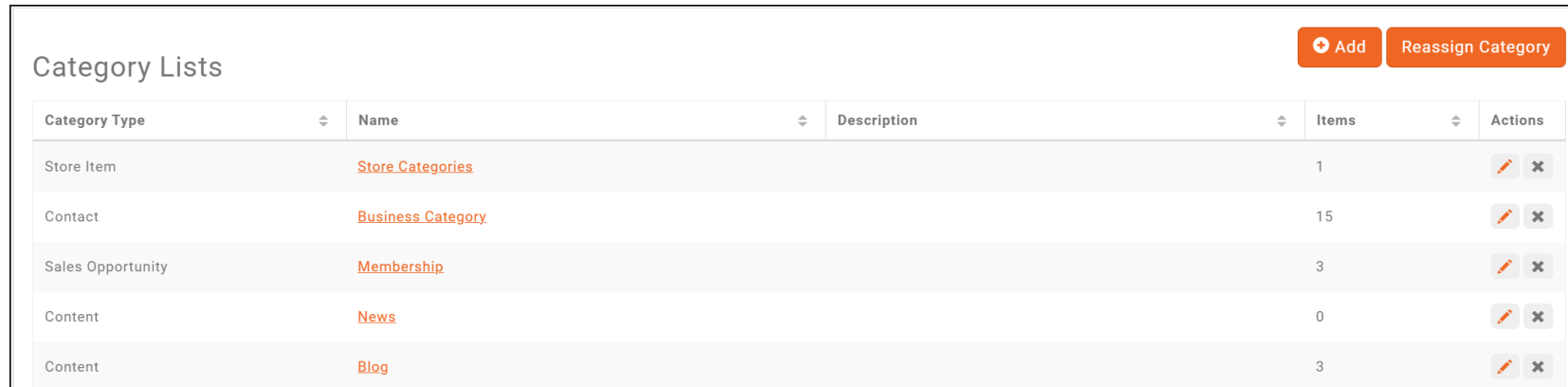
Name	Login Name	Primary Contact / Password Reset Email	Status	Access Level	Actions
Cheri Petterson	Cheri.Petterson	cheri.petterson@growthzone.com	Active	Staff - Admin	  
Training Training	training	training@mailinator.com	Active	Staff Admin - No Full Control - Edit	  
Joan Anderson	joana	joana@mailinator.com	Not active	Staff - Admin	
Josie Mayson	jmasyon	jmasyon@mailinator.com	Active	Staff - Admin	  
Susan Williams	susan	susan.williams@mailinator.com	Active	Staff - Admin	  











WIKI: [Setup Staff Users](#)

Defining Categories & Lists

Categories allow you to create filtering and grouping options for such things as member directory, store items, web content etc. It is recommended that you use categories:

- If intended for public or internal use and is used to segment records into groups. For example: You may have categories of products in your store, categories in your directory search, etc.
- If you wish to allow visitors to your directory, web content, events, etc. ability to filter to specific categories
- If you wish to display this information publicly or in the Info Hub



Category Type	Name	Description	Items	Actions
Store Item	Store Categories		1	 
Contact	Business Category		15	 
Sales Opportunity	Membership		3	 
Content	News		0	 
Content	Blog		3	 

WIKI: [Category Lists](#)

Update Chart of Accounts (COA)

Billing -> Overview Tab: Chart of Accounts link

A sample chart of accounts is provided as a starting point

WIKI: [Chart of Accounts](#)

Search... Show only... Customize Results... ShowActive [Clear All] Add

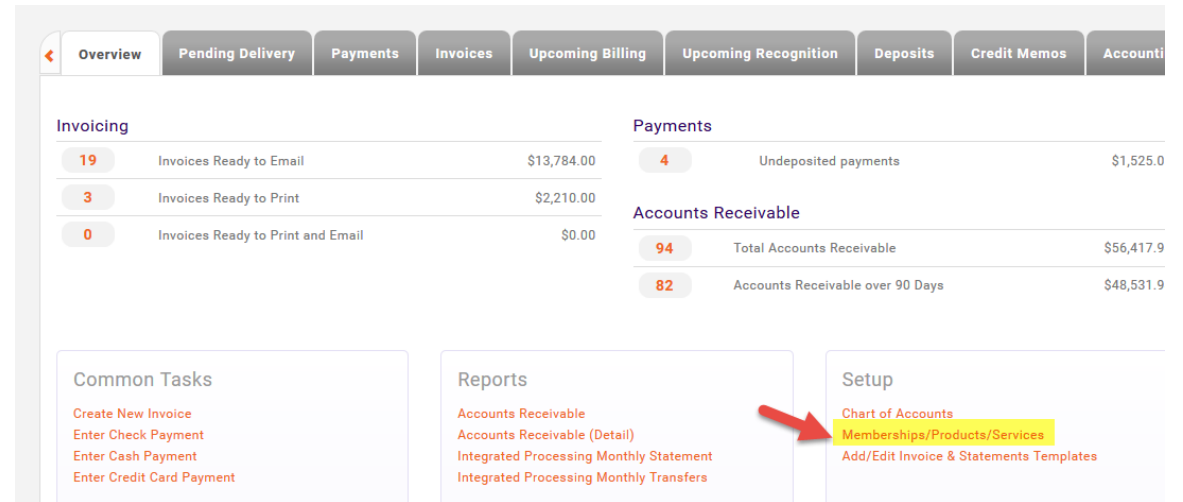
Number	Name	Type	Actions
MEM-REV	System Default Income Account	Revenue	X
DEP-CASH	System Default Deposit Account	Current Asset	X
ACCT-RECV	System Default Accounts Receivable Account	Current Asset	X
DEF-MEM-REV	System Default Deferred Revenue Account	Current Liability	X
DEF-DIS	System Default Discount Account	Revenue	X
DEF-DEF-DIS	System Default Deferred Discount Account	Current Liability	X
DEF-GEN-TAX	System Default General Tax	Current Liability	X

Create Goods/Service items

Sample items have been setup for key items such as a general membership, membership setup and event registrations.

Go to Billing -> Overview Tab -> Memberships/Products/Services

WIKI: [Setup Goods/Services](#)



The screenshot displays the 'Billing Overview' page in the GrowthZone software. At the top, there are navigation tabs: Overview (selected), Pending Delivery, Payments, Invoices, Upcoming Billing, Upcoming Recognition, Deposits, Credit Memos, and Accounti. Below the tabs, there are three summary tables:

Invoicing		
19	Invoices Ready to Email	\$13,784.00
3	Invoices Ready to Print	\$2,210.00
0	Invoices Ready to Print and Email	\$0.00

Payments		
4	Undeposited payments	\$1,525.00

Accounts Receivable		
94	Total Accounts Receivable	\$56,417.90
82	Accounts Receivable over 90 Days	\$48,531.90

Below the tables are three main sections:

- Common Tasks:** Create New Invoice, Enter Check Payment, Enter Cash Payment, Enter Credit Card Payment.
- Reports:** Accounts Receivable, Accounts Receivable (Detail), Integrated Processing Monthly Statement, Integrated Processing Monthly Transfers.
- Setup:** Chart of Accounts, **Memberships/Products/Services** (highlighted with a red arrow), Add/Edit Invoice & Statements Templates.

Goods/Services

Sample items have been created.

[Back to Setup](#)

Goods/Services

Type	Category	Name	Income Account	Default Price
Membership	General	Membership	System Default Income Account	\$1,200.00
Membership	General	Membership Setup	System Default Income Account	\$1,000.00
Event Registration	General	Event Registration	System Default Income Account	\$50.00

Add/Edit Good/Service Items

Name
Membership

Good/Service Type
Membership

Product Category
General

Description
Default Membership Invoice description

Product Description

Default Membership
Note: This text will be shown on Sales Funnel proposals

Price Period
Annually

Default Price
1200

Default Quantity
1

Accounting Type
Accrual

Revenue Recognition Type
Fully on Invoice Date

Income Account
System Default Income Account (Revenue)

Receivables Account
System Default Accounts Receivable Account (Current Asset)

Deferred Income Account
System Default Deferred Revenue Account (Current Liability)

Deposit Account
System Default Deposit Account (Current Asset)

Default Revenue Recognition Months
12

Voluntary

Product Tax Category
-- select a Product Tax --

Tax Set

Is Recurring Fee (vs. one-time)

Invoice Template
-- select a Invoice Template --

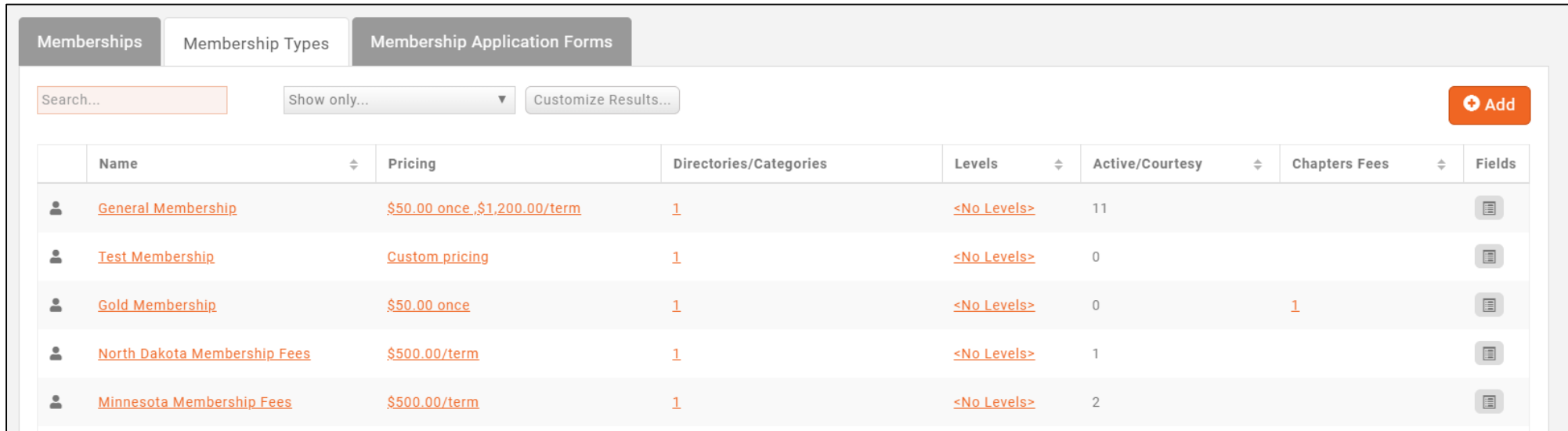
Default will be used unless you select an alternative invoice











Is Active
 must be checked to show as option on invoice setup

Used when filtering lists in other areas

View Membership Types

- Membership Types allow you to define the membership packages you wish to provide to your members
- These membership types may be included on your membership application form
- WIKI: [View Membership Types](#)



	Name	Pricing	Directories/Categories	Levels	Active/Courtesy	Chapters Fees	Fields
	General Membership	\$50.00 once, \$1,200.00/term	1	<No Levels>	11		
	Test Membership	Custom pricing	1	<No Levels>	0		
	Gold Membership	\$50.00 once	1	<No Levels>	0	1	
	North Dakota Membership Fees	\$500.00/term	1	<No Levels>	1		
	Minnesota Membership Fees	\$500.00/term	1	<No Levels>	2		

Add a Membership Type

Once a membership type has been created you may:

- Add Membership Pricing
- Add Directory/Categories
- Add Levels
- Add/Edit Fields to be included on the Membership Application Form

Add Pricing to A Membership Type

WIKI: [Add Pricing to a Membership Type](#)

Payment Gateway: -- Select a Payment Gateway --

Invoice Template: -- Select an Invoice Template --

Payment Terms: -- Select a Payment Terms --

Terms/Conditions: -- Select a Terms/Conditions --

Formula Based Pricing:

Prorate Partial Years:

Does your Membership have pricing levels? Enter the base price below (if any). Then enter your pricing on the Levels screen for this Membership Type.

Recurring Fees

Item	Description	Price (12 mos.)
------	-------------	-----------------

Setup/One-Time Fees

Item	Description	Price	Hide
------	-------------	-------	------

Discount

Discount	Name	Promo Code	Start Date	End Date
----------	------	------------	------------	----------

Payment Options

Round the Per Bill Amount:

Allow	Frequency	Proration Interval	Allow Invoicing	Allow Credit Cards	Per Bill Amount	Price Change %
<input type="checkbox"/>	Monthly		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0
<input type="checkbox"/>	Quarterly		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0
<input type="checkbox"/>	Semiannually		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0
<input checked="" type="checkbox"/>	Annually	No Proration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	0

Add Directory/Categories to Membership Type

Membership Types may associate to a particular **Directory**, and to a set of **Directory Display Settings**. Directory Display Settings control what information is displayed in the directory for a business or individual

Results: 1



Macaroon's | 2189968574



Best Macaroons ever


896547 Main Street, MN 564478



[Learn More](#)

Add Directory/Categories to Membership Type

WIKI: Setup Membership Type Directories & Categories




Edit Membership Benefits - Multiple Membership Selection - With Top Level Selection < 6 of 18 >  

Directory Listing 

Directory: Active Member Directory ▼ Directory Display: Standard Listing ▼  

Directory Categories

Display Directory Categories

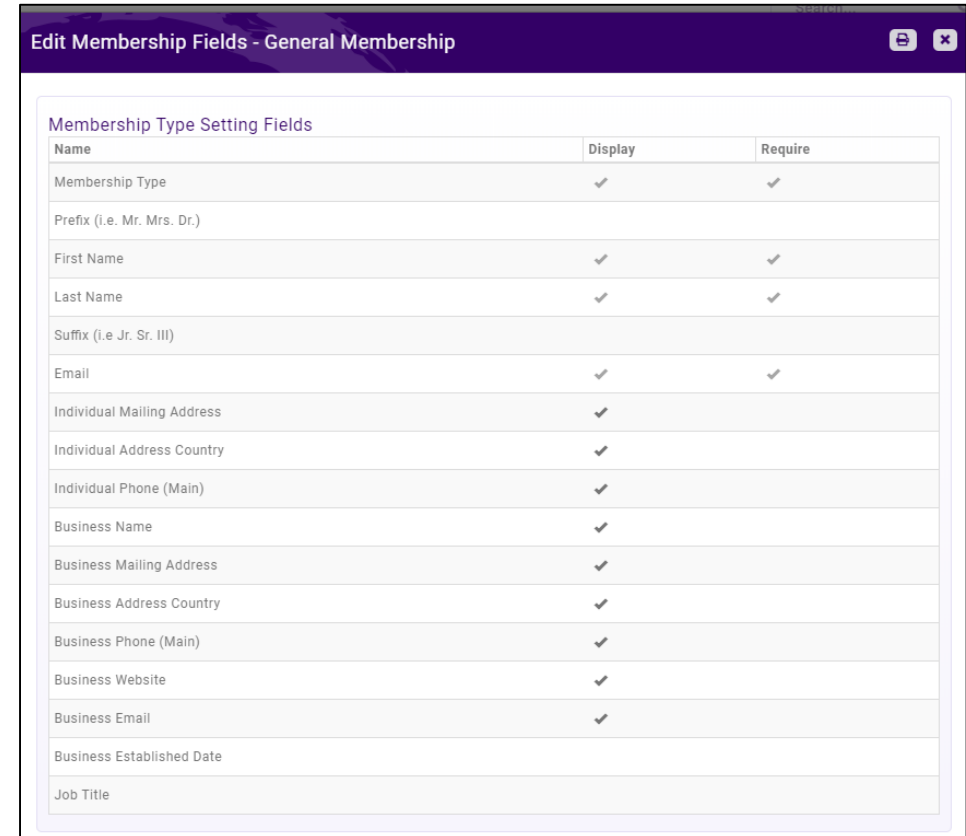
Category List: -- Select a Category L ▼  Minimum Required: 0 Maximum Allowed:  

Cancel Done

Membership Application Form Fields/Questions

For each Membership Type, you can add/edit the fields you wish to include on your application form

WIKI: [Setup Membership Application Form Fields/Questions](#)



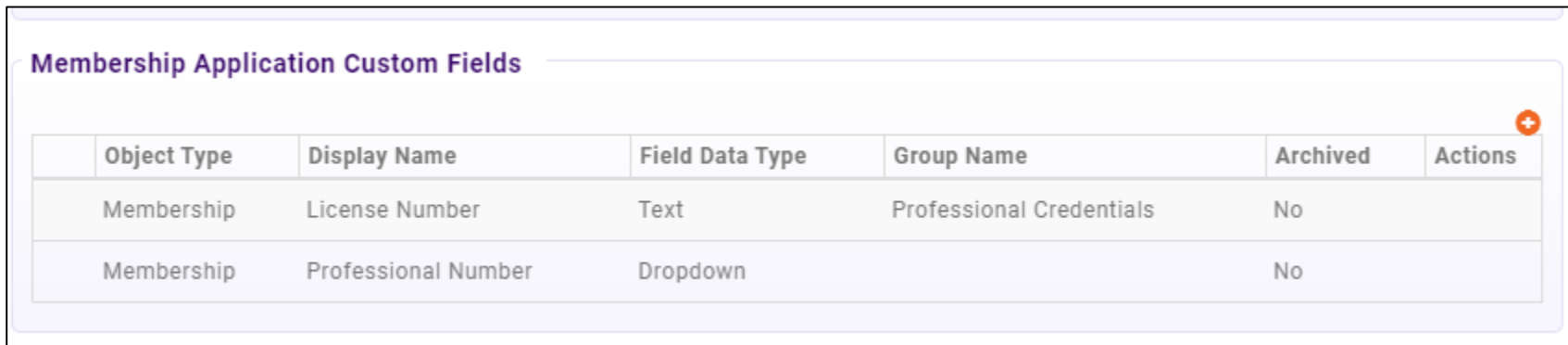
Membership Type Setting Fields

Name	Display	Require
Membership Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prefix (i.e. Mr. Mrs. Dr.)	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix (i.e. Jr. Sr. III)	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Individual Mailing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Individual Address Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Individual Phone (Main)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Mailing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Address Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Phone (Main)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Established Date	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input type="checkbox"/>	<input type="checkbox"/>

Membership Application Form Fields/Questions

Membership Application Custom Fields: Additional fields may be added to your application form. Dependent on the **Field Area** selected, the field will display:

- **Individuals:** Will display on an individual's More Info tab
- **Business:** Will display on a business's More Info tab
- **Membership:** Will display under the Membership on the General Tab



The screenshot shows a web interface titled "Membership Application Custom Fields" with a table containing two rows of field configurations. The table has columns for Object Type, Display Name, Field Data Type, Group Name, Archived, and Actions. A plus sign icon is visible in the top right corner of the table area.

Object Type	Display Name	Field Data Type	Group Name	Archived	Actions
Membership	License Number	Text	Professional Credentials	No	
Membership	Professional Number	Dropdown		No	

Add Levels to Your Membership Type

Membership Levels allow you the flexibility to offer the same membership, but offer different prices.

For example, you may offer a General Membership, where pricing is based on the number of employees:



- General Membership – 1 – 5 employees
- General Membership – 6 – 15 employees
- General Membership – 16 – 25 employees

This would be one membership type (General Membership) with 3 levels

Add Levels to Your Membership Type

WIKI: [Setup Membership Type Levels](#)

Edit Membership Levels - General Membership

< 1 of 6 >  

Default Membership \$500.00 Annually, Membership Setup \$100.00 OneTime

Levels

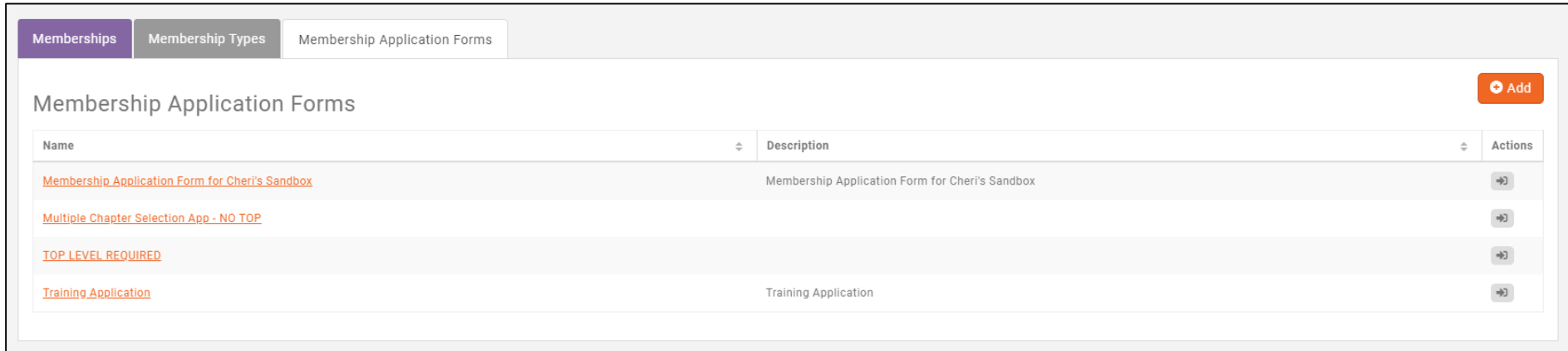
Name	Pricing
1 - 5 Employees	Base Fees + \$125.00
6 - 25 Employees	Base Fees + \$200.00
26 - 50 Employees	Base Fees + \$300.00
More than 50 Employees	Base Fees + \$500.00

Cancel Done





Membership Application Form

A default application form is setup in your system. You may use it as it is configured, you customize to better meet your needs or create a new application form(s)

WIKI: [View/Create Membership Application Form](#)



The screenshot shows a web interface for managing membership application forms. At the top, there are three tabs: 'Memberships', 'Membership Types', and 'Membership Application Forms'. Below the tabs, the title 'Membership Application Forms' is displayed next to an 'Add' button. A table lists the existing forms with columns for Name, Description, and Actions.

Name	Description	Actions
Membership Application Form for Cheri's Sandbox	Membership Application Form for Cheri's Sandbox	
Multiple Chapter Selection App - NO TOP		
TOP LEVEL REQUIRED		
Training Application	Training Application	

Accepting Online Memberships

Two page application form -- first page gathers critical info

- Show Instructions
- List Membership Options
- Include descriptions
- Gather Contact Info
- Adds Contact to database - even if contact skips step 2

Accepting Online Memberships

Second page gathers additional information

- Individual contact phone, address
- Organization contact phone, address
- Optional details
 - Select Directory Listing Category
 - Show Lists they can join
 - Allow making a donation
 - Ask “custom” questions
- Membership Owner
- Payment options
- Join button

Select Categories

Business Category
-- select a category item --

Organization Directory "Where to"
-- select a category item --

Join These Communication Lists

	Name	Description
<input type="checkbox"/>	Volunteers	Volunteers
<input type="checkbox"/>	Community News	Community News
<input type="checkbox"/>	eNewsletter	eNewsletter
<input type="checkbox"/>	Chris's Construction	

Donation/Contribution Opportunities

Campaign Name	Item Description	Amount
General Unrestricted Campaign	Donations from Individuals	Select an amount or add custom

Billing Details

Membership Owner
Organization

Invoice Me
 Pay Now

Join

New Membership Notifications

Thank you page will appear online to new member

- You can customize the Completion message - Memberships > Edit Membership Application Form
- Check to allow new members ability to create their login and access the Info Hub

New member receives an email confirmation

- Email is sent to address associated with the Membership Owner
- Select the email template - Memberships > Edit Membership Application Form

Staff will receive an email alert

- Check to subscribe to the “Membership Application Submitted” user notification

Membership Application Confirmation Email

The default email sent to the new applicant may be customized

Setup > Communication > Email Templates

Membership Application Submitted



Anderson's Plumbing



Thank you for filling out our membership application.

Best regards,


Member Management Training.


Staff Email Notifications

Staff Members subscribed to the Membership Application Submitted email notification will receive an automated email

Notifications  

Subscribe	Notification Type	Email Address	Frequency
<input checked="" type="checkbox"/>	Membership Application Submitted	cheri.petterson@growthzone	As It Happens
<input checked="" type="checkbox"/>	Member Modified Profile	cheri.petterson@growthzone	As It Happens
<input type="checkbox"/>	User Created Or Edited Web Content	cheri.petterson@growthzone	As It Happens
<input type="checkbox"/>	Member Referral	cheri.petterson@growthzone	
<input type="checkbox"/>	New Person Added To Existing Membership	cheri.petterson@growthzone	
<input checked="" type="checkbox"/>	Contact Us Submission	cheri.petterson@growthzone	
<input checked="" type="checkbox"/>	Sales Proposal Accepted	cheri.petterson@growthzone	

 **Application Completed for Anderson's Plumbing**

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Anderson's Plumbing has applied for a General Membership (\$1,200.00) to Member Management Training

The applicant's email is

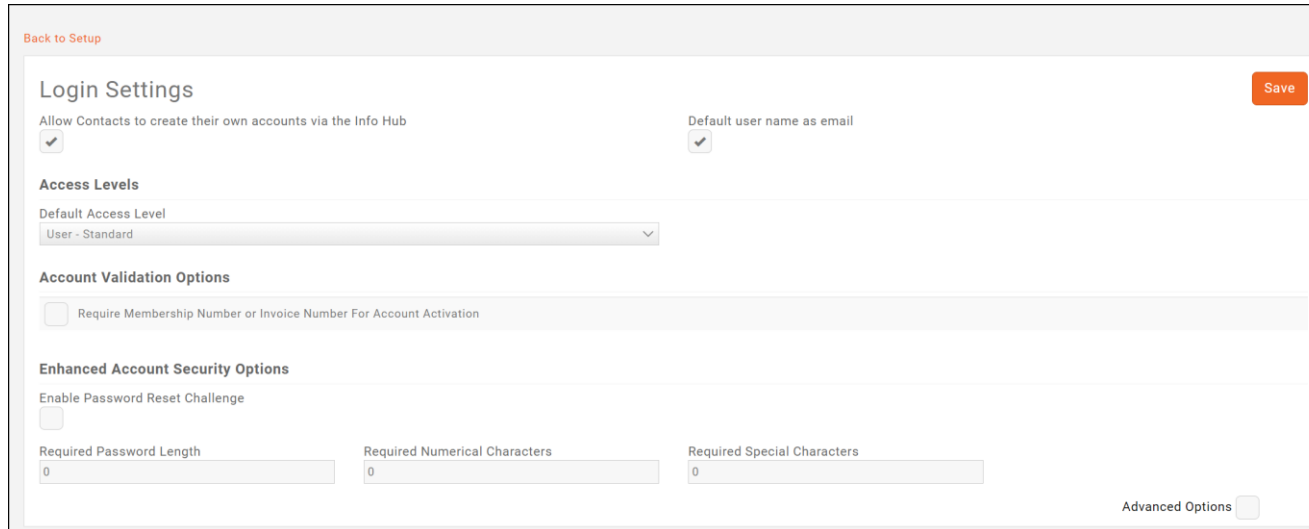
The applicant's address:

One of the great features of GrowthZone is The Info Hub, a member center that enables your users to access key information and actively engage with your organization.

The Hub allows users to search the directory of other members, see upcoming events, submit events, signup for lists and committees, view their membership details, view and complete billing-related steps (pay invoices, view past billing, see open invoices, etc.), see completed certifications (if applicable) and more.

[Take a Tour](#)

The actions that your members may perform via Info Hub are driven by the **Access Level** you have granted to them



The screenshot shows the 'Login Settings' configuration page. At the top left is a 'Back to Setup' link. The page is titled 'Login Settings' and has a 'Save' button in the top right corner. The settings are organized into several sections:

- Allow Contacts to create their own accounts via the Info Hub:** A checkbox that is checked.
- Default user name as email:** A checkbox that is checked.
- Access Levels:** A section containing a 'Default Access Level' dropdown menu currently set to 'User - Standard'.
- Account Validation Options:** A section with a checkbox for 'Require Membership Number or Invoice Number For Account Activation' which is unchecked.
- Enhanced Account Security Options:** A section with a checkbox for 'Enable Password Reset Challenge' which is unchecked. Below this are three input fields: 'Required Password Length' (set to 0), 'Required Numerical Characters' (set to 0), and 'Required Special Characters' (set to 0).

At the bottom right of the form is an 'Advanced Options' checkbox, which is also unchecked.

WIKI: [Setup Member Access to the Info Hub](#)

Questions?

