

GrowthZone: Managing Your Store

Agenda


- Overview of Store Module
- Initial Setup of Store Module
 - Shipping Options
 - Setting up Fee Items
 - General Settings
- Managing your Store
 - Adding Products
 - Store Order Notifications
 - Reviewing & Fulfilling Orders
- Reporting

Overview

- The Store Module is a module that allows the association to sell additional resources/products to members
- The integrated Store in your GrowthZone Software, makes selling and processing orders as simple as possible

CHERI'S SANDBOX STORE

Welcome to our Store.... find all of your lakes logo gear at the tip of your fingers




LOGO T-SHIRT

\$ 40.00

[Details](#)

[Add To Cart](#)




LOGO BACKPACK

\$ 50.00

[Details](#)

[Add To Cart](#)



LOGO BASEBALL CAPS

\$ 25.00

[Details](#)

[Add To Cart](#)

Getting Started

- ✓ Shipping Options
- ✓ Setting up Goods/Services
- ✓ General Settings

← Setup

Shipping OptionsPrice Tiers

ADD

Name	Account	Is Active	Description	Actions
Standard Shipping Fees	System Default Income Account	Yes		
Over-night Shipping	System Default Income Account	Yes		
In Store Pickup	System Default Income Account	Yes		
Test	System Default Income Account	No		
UPS 2 Day Air	System Default Income Account	Yes		
Fedex	Training Revenue	Yes		

Need Help?

Shipping Options

The shipping price applied to a sale depends on the total amount of the sale

KB: [Setting up Shipping Options](#)

Shipping Option

Standard Shipping Fees

Step 4: Grand Total

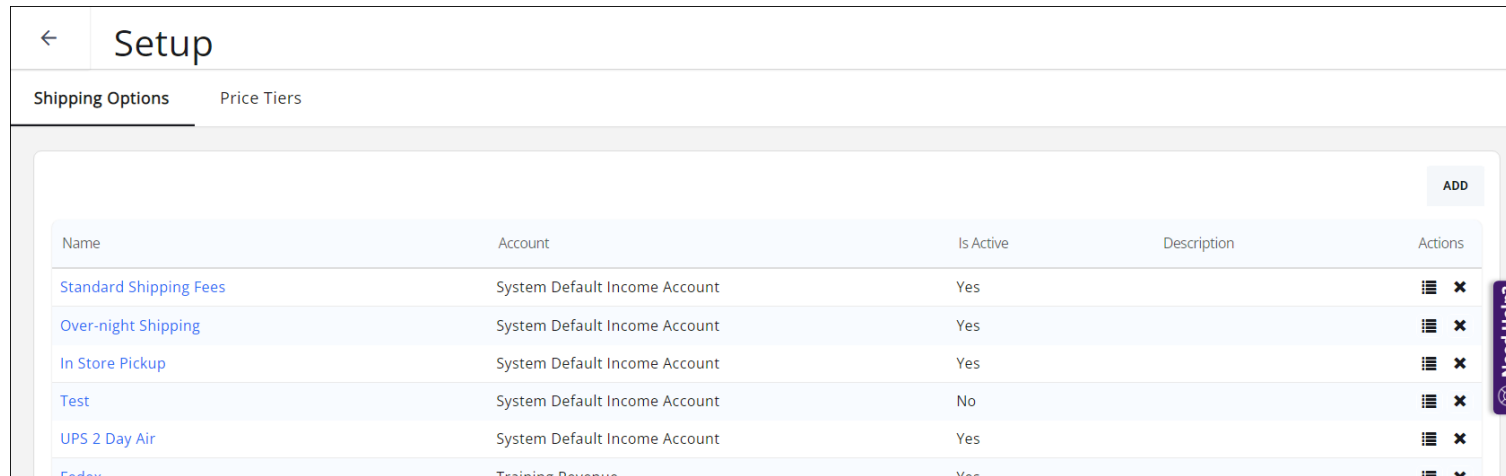
Order Subtotal:	\$ 100.00
Tax:	\$ 4.00
Total with Tax:	\$ 104.00
Shipping:	\$ 0.00
Grand Total:	\$ 104.00

Shipping Options

The **Shipping** functions allow you to set the shipping fees associated to a sale

This is a two step process:

1. Set up pricing tiers
2. Associate tiers to a Shipping options

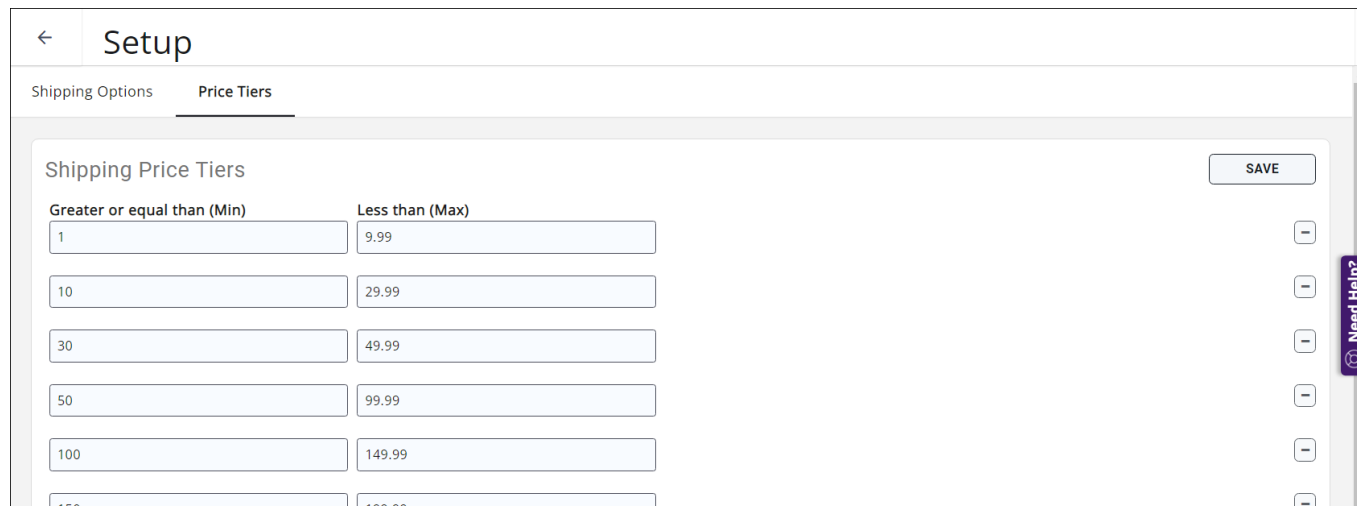


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UPS 2 Day Air	System Default Income Account	Yes		
Fedex	Training Revenue	Yes		

Shipping Options

Setting up Tiers

- The **Price Tiers** screen is where you can set up your shipping price thresholds
- Each item in the Price Tier is a price range with a minimum and a maximum value



The screenshot shows a web interface for setting up shipping price tiers. At the top, there's a 'Setup' header with a back arrow. Below it, there are two tabs: 'Shipping Options' and 'Price Tiers', with 'Price Tiers' being the active tab. The main content area is titled 'Shipping Price Tiers' and contains a table with two columns: 'Greater or equal than (Min)' and 'Less than (Max)'. The table has six rows, each with input fields for these values. To the right of the table, there are minus signs for each row, and a 'Need Help?' button. A 'SAVE' button is located in the top right corner of the table area.

Greater or equal than (Min)	Less than (Max)
1	9.99
10	29.99
30	49.99
50	99.99
100	149.99
150	199.99

Shipping Options

Associate the price tiers to shipping costs by clicking the  button on the Shipping Options screen

All the shipping option sets that you create will automatically be available in your store at checkout

Edit Shipping Option Price Tier Fees

×

Min Value	Max Value	Shipping Fee
\$1.00	\$9.99	2.99
\$10.00	\$29.99	5.99
\$30.00	\$49.99	7.99
\$50.00	\$99.99	9.99

Setup Fee Items for Store Products

Define the fee items associated to the products you will sell in your store. Fee Item Type of "Physical Product" or "Digital Product"

KB: Setting Up Fee Items

Add Fee Item

Name *
New Store Item

Fee Item Type *
Physical Product ▼

Product Category *
Store Item ▼

Is Active
☒

Description *
New Store Item

Product Description

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Store General Settings

Store Description

KB: [Set up Store General Settings](#)

Store

OrdersProductsSettingsDigital Download Access

Store Settings

Staff URL
<https://cherissandbox.growthzoneapp.com/store/>

Public URL
<https://cherissandbox.growthzoneapp.com/store/>

Store Description

Payment Gateway

☒ Enable Additional Notes on Checkout☒ Require Phone on Checkout

SAVE

Need Help?

Add Physical Products to Your Store

Edit Store Item

Name* For Sale Price* 2 Inventory Tracking Default

Inventory Remaining Contact

Sub Items

Name	Price	Inv. Remaining
------	-------	----------------

Fee Item* Store Item Class Category

Available To These Members:


Description
Made of durable, weather-resistant plastic
Large 16" x 22" size makes the sign easy to read, even from a distance

Short Description
Large 16" x 22" size makes the sign easy to read, even from a distance

☒ Is Active

Images

Add Edit Remove



☒ Shipping Not Available

Cancel Done

Your Store Module can assist you in managing “attributes” for physical product, such as size or color

In addition, you will be able track available inventory

KB: [Add Physical Products to Your Store](#)

Add Digital Products to Your Store

Add Digital Store Item

Name *

Contract Package

Price *

50

Fee Item *

Digital Product

Class

Category

Documentation

Available To These Members:

X Affiliate Membership, 2 more

Description

Digital download of 2023 contracts.

Short Description

☒ Is Active

SELECT FILE / FOLDER

File/Folder: Test Document.docx (12 KB)

File Download Expiration Date

☒ Only Allow Active Members ⓘ

Cancel

Done

Digital Products provide a way to sell documentation to your members and the public

KB: [Add Digital Downloads](#)

Add Digital Products to Your Store

Pre-requisites:

- Fee Item must be of Type = Digital Product
- Document uploaded to the Cloud

KB: Add Digital Downloads

Add Digital Store Item

Name*

Contract Package

Price*

50

Fee Item*

Digital Product

Class

Category

Documentation

Available To These Members:

X Affiliate Membership, 2 more

Description

Digital download of 2023 contracts.

Short Description

☒ Is Active

SELECT FILE / FOLDER

File/Folder: Test Document.docx (12 KB)

File Download Expiration Date



☒ Only Allow Active Members ⓘ

Cancel

Done

Managing Your Store Orders

Notifications

< 1 of 23 >  

Notifications

Search

Search...

Category

Store

<input type="checkbox"/>	Category	Notification Type	Email Address	Frequency
<input checked="" type="checkbox"/>	Store	New Store Order Created	cheri.petterson@growthzone.com	As It Happens

Cancel

Done

When an order is placed, an automated message will be sent to those staff members who have subscribed to the **New Store Order Created** notification

Managing Your Store Orders

All orders placed through your store will be displayed on the **Orders** tab of the Store module

Store

Orders

Products

Settings

Digital Download Access

Search...

Q

ADD ORDER

Name	Purchase Date	Product Total	Notes	Status	Ref #
Cheri Petterson	2/21/2018	\$185.99		Fulfilled	42
Cheri Petterson	2/28/2020	\$100.00		Fulfilled	395
Cheri Petterson	6/12/2020	\$50.00		Pending	475
Cheri Petterson	6/12/2020	\$190.00		Fulfilled	476
Cheri Petterson	6/12/2020	\$500.00		Pending	477
Cheri Petterson	6/22/2020	\$1.00		Fulfilled	494
Cheri Petterson	7/17/2020	\$10.00		Fulfilled	527
Lisa Barnett	7/29/2020	\$65.00		Pending	531
Cheri Petterson	7/30/2020	\$10.00		Fulfilled	532
Cheri Petterson	7/30/2020	\$35.00		Fulfilled	533
Cheri Petterson	11/11/2020	\$50.00		Fulfilled	674

1 - 24

TOTAL: 24

Need Help?

Managing Your Store Orders

Edit Order Details

< 1 of 24 >

✕

General Information

Contact Name

Cheri Meyer

Email Address

cheri.meyer@mailinator.com

Phone Number

216-987-9876

Purchase Date

10/4/2022

Shipping Information

Company Name

Name of Person

Address

Address 2

City

Country

None

State/Province

Postal Code

Shipping Option

Status

Fulfilled

Notes (for internal use only)

Order Information

Products

Store Item Id	Name	Quantity	Price	Total Price
10918	Maps	1	\$15.00	\$15.00

Totals

Grand Total

\$15.00

Cancel

Done

To view order and update the status of an order, click into the Purchaser's **Name** on the Orders tab

Store Reports

The **Store Product Purchases** report will generate a list of all product sold through your store

KB: [Store Product Purchases Report](#)

←

Store Product Purchases

...

RUN REPORT

Order Date Between

Jan 1, 2022 - Dec 31, 2022

Product Name

Fee Item

Additional Criteria / Filters

+

Display Options

Fields to Display

✕ Line Item Total, ✕ Order Date, ✕ Product Contact Name, ✕ Product Name, ✕ Quantity, ✕ Ref #, ✕ Contact Name,

Summarize By

⌵

Display Mode

Detail

Add Summarize By

Results: 9

Contact Name ⌵	Product Name ⌵	Order Date ⌵	Quantity ⌵	Line Item Total ⌵	Ref # ⌵	Product Contact Name ⌵
Cheri Petterson	For Sale	5/17/2022	1	\$2.00	1590	
Cheri Petterson	Open House	5/17/2022	1	\$5.00	1589	
Cheri Petterson	Open House	5/17/2022	1	\$5.00	1590	
Daniel Mackay	Sale Pending	7/19/2022	5	\$10.00	1595	
Cheri Petterson	Maps	5/17/2022	1	\$15.00	1592	
Cheri Petterson	Maps	10/4/2022	1	\$15.00	1628	
Cheri Meyer	Maps	10/4/2022	1	\$15.00	1629	
Cheri Petterson	New T - shirt - Blue	5/17/2022	1	\$25.00	1591	
Daniel Mackay	Open House	7/19/2022	10	\$50.00	1595	

Count 9

Store Reports

The **Store Products** report will generate a list of all your store products, along with the number sold of each item, and the number of orders for each item

KB: [Store Products Report](#)

Store Products

Purchase Date Between: Jan 1, 2022 - Dec 31, 2022

Product Name: [Search]

Fee Item: [Search]

Additional Criteria / Filters: [Add]

Display Options

Fields to Display: [X] Fee Item, [X] Number Of Orders, [X] Product Name, [X] Total \$ Sold

Summarize By: [Item] [Add Summarize By]

Display Mode: [Detail]

Results: 5

Product Name	Fee Item	Total \$ Sold	Number Of Orders
Maps	Digital Product	45	3
Open House	Signs	60	3
Sale Pending	Signs	10	1
For Sale	Store Item	2	1
New T-shirt - Blue	T-shirt	25	1
Count	5		

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)
800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)
7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base »](#)

Online Training Calendar: [Training Event Calendar »](#)

Live Chat: [GrowthZone Support Portal \(chat on far right\) »](#)