

Managing Your Contacts



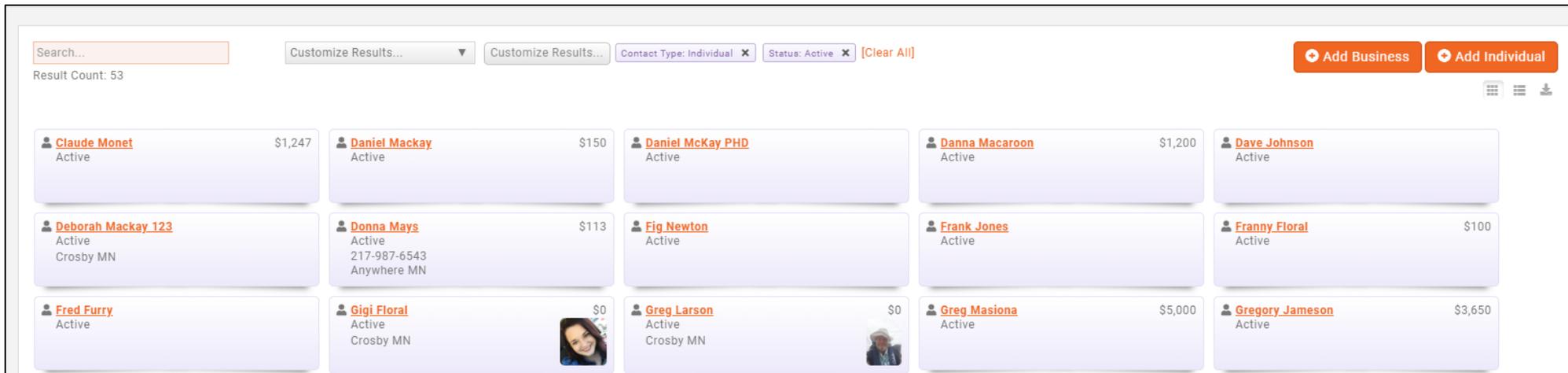
Agenda

- View/Find Contacts
- Add Contacts
- Update Contact Information
- Manage Contact Custom Fields
- Manage Contact Parent/Child Relationships
- Merge Contacts

Contact Management

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

Easily view and manage 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 are located in the top right.
- Contact Cards:** A grid of 12 contact cards, each showing a name, status, and a value.

Name	Status	Value
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 217-987-6543 Anywhere MN	\$113
Fig Newton	Active	
Frank Jones	Active	
Franny Floral	Active	\$100
Fred Furry	Active	
Gigi Floral	Active Crosby MN	\$0
Greg Larson	Active Crosby MN	\$0
Greg Masiona	Active	\$5,000
Gregory Jameson	Active	\$3,650

Searching for Contacts

Global Search

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



Finding Contacts

Search within **Contacts** Module

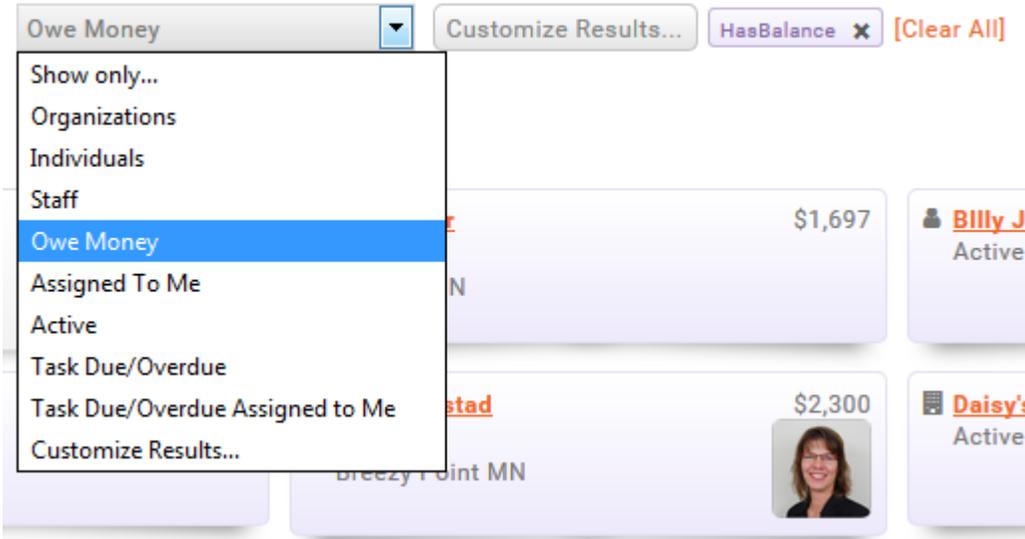
Search... Show only... Customize Results... + Add Organization

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

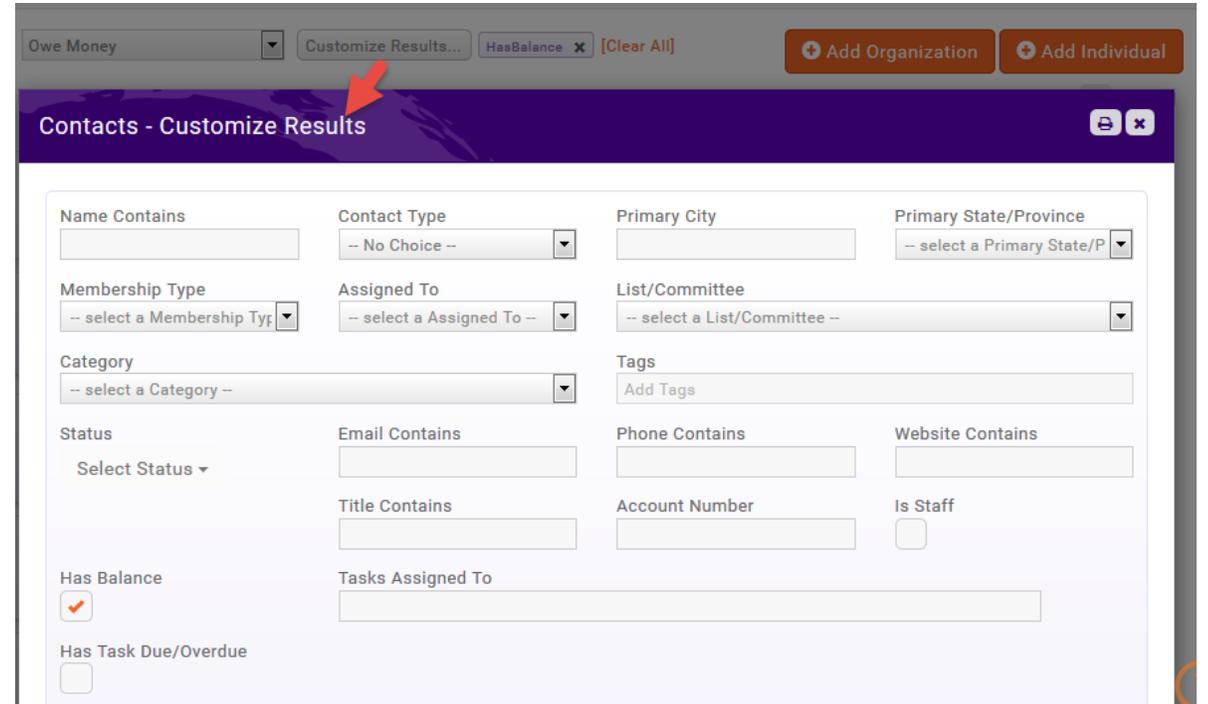
Searching for Contacts

Show Only... (drop down list)



The screenshot shows a search interface with a dropdown menu open. The dropdown menu is titled "Show only..." and lists several 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 in the top right of the search area.

Customize Results button for advanced filters



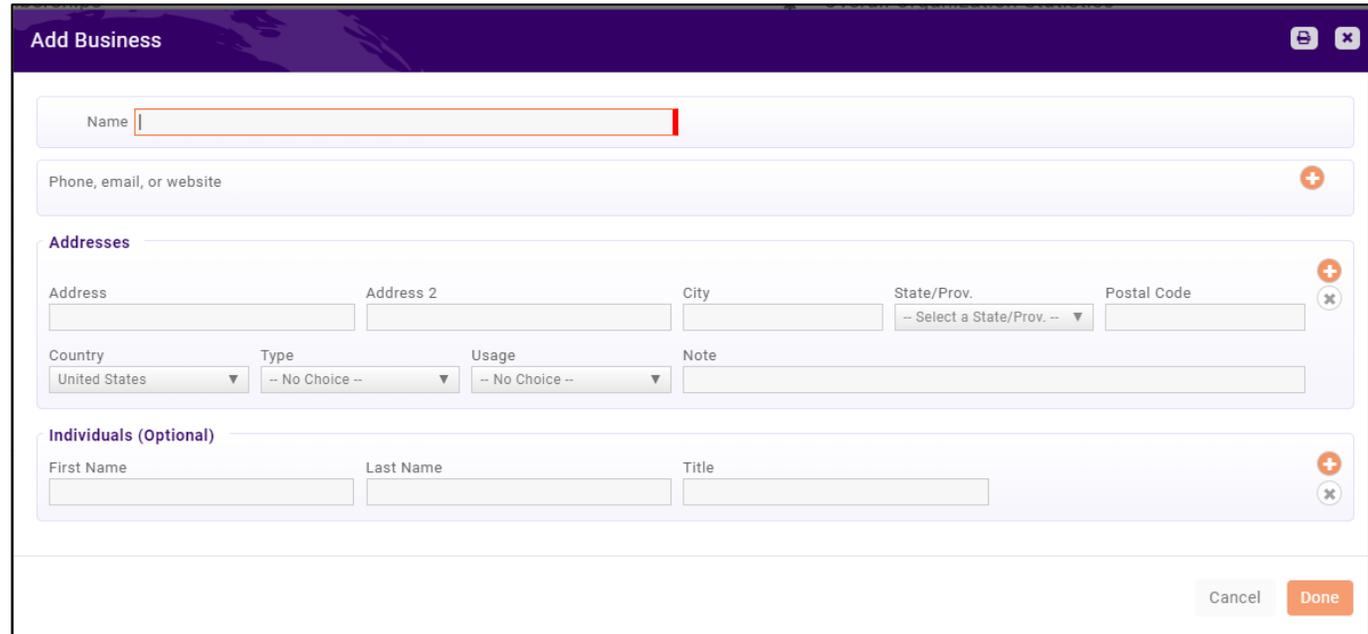
The screenshot shows the "Customize Results" dialog box. A red arrow points to the "Customize Results..." button in the top right of the search area. The dialog box is titled "Contacts - Customize Results" and contains various filter options:

- 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:
- Has Task Due/Overdue:
- Tasks Assigned To:

Add Contact

Quick Actions

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



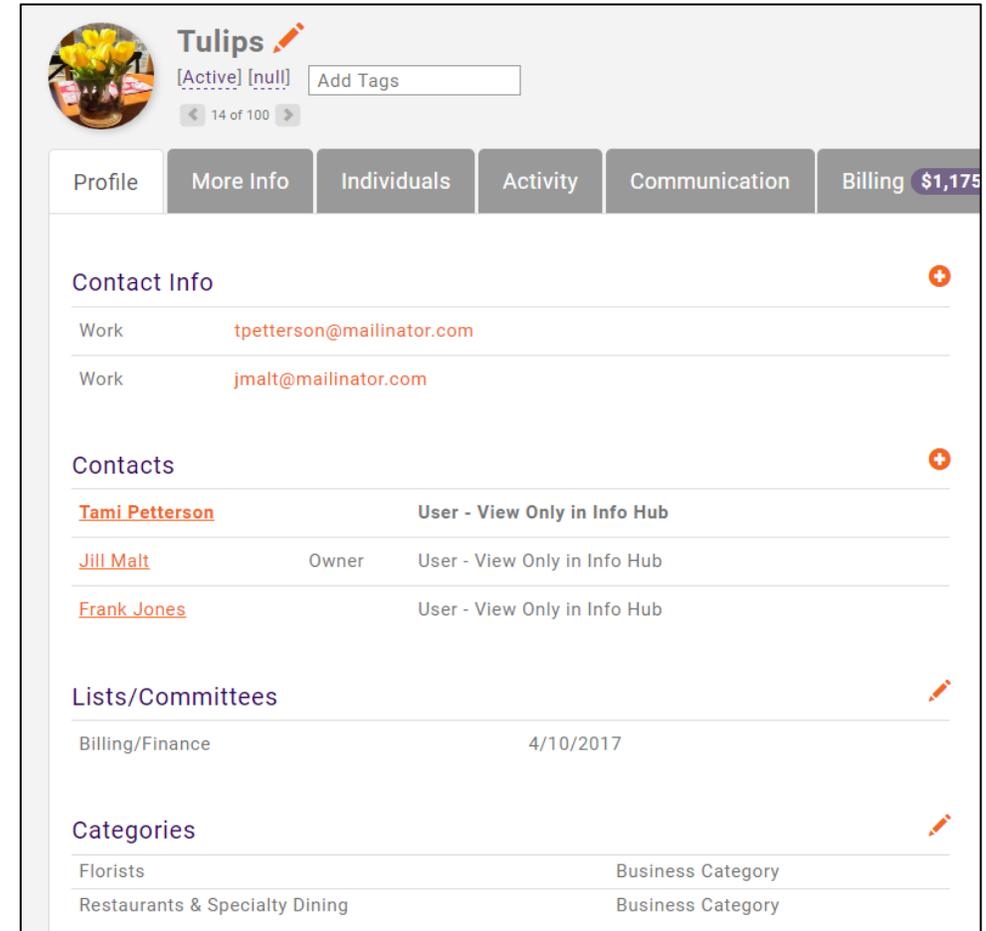
The screenshot shows a web form titled "Add Business" with a dark purple header. The form is organized into several sections:

- Name:** A single text input field.
- Phone, email, or website:** A text input field with a red plus icon on the right for adding more information.
- 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 Profile

The contact information for a business or individual can be updated on the Profile tab

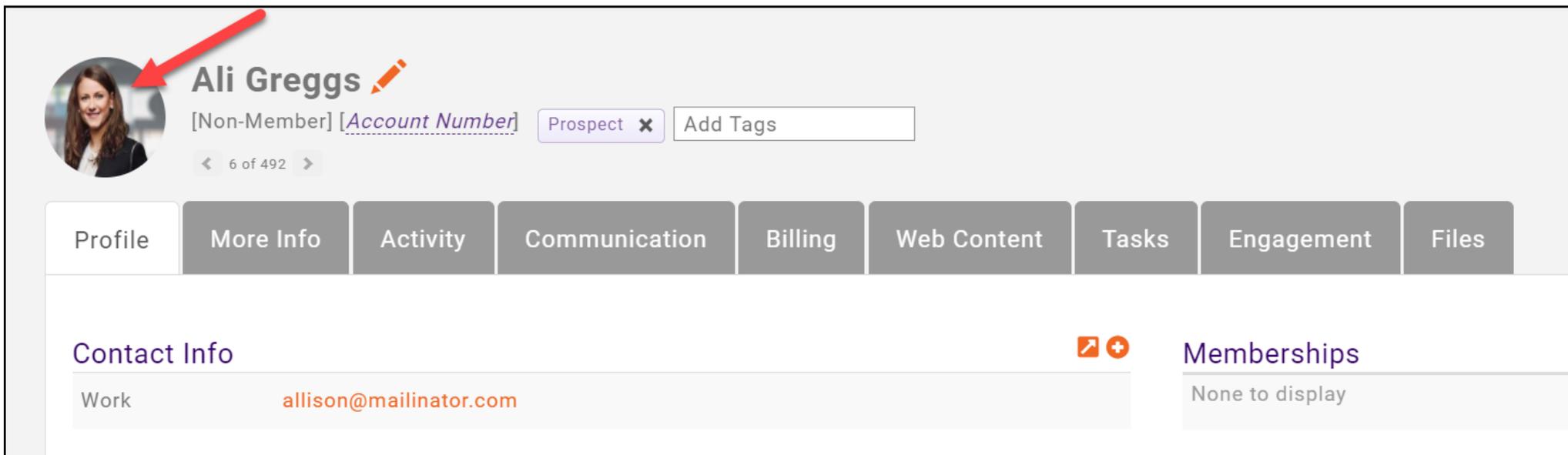


The screenshot shows a contact profile for 'Tulips' with a profile picture of yellow tulips. The profile is active and has no tags. A navigation bar includes tabs for Profile, More Info, Individuals, Activity, Communication, and Billing (\$1,175). The main content area is divided into sections: Contact Info (with work emails tpetterson@mailinator.com and jmalt@mailinator.com), Contacts (listing Tami Petterson, Jill Malt, and Frank Jones), Lists/Committees (Billing/Finance as of 4/10/2017), and Categories (Florists and Restaurants & Specialty Dining, both as Business Categories).

Section	Item	Value
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 Photo/Logo

- Not to be overlooked, the contact photo/logo can be displayed in your membership directories if you have setup listings to do so



Ali Greggs 
[Non-Member] [[Account Number](#)] Prospect ✕
< 6 of 492 >

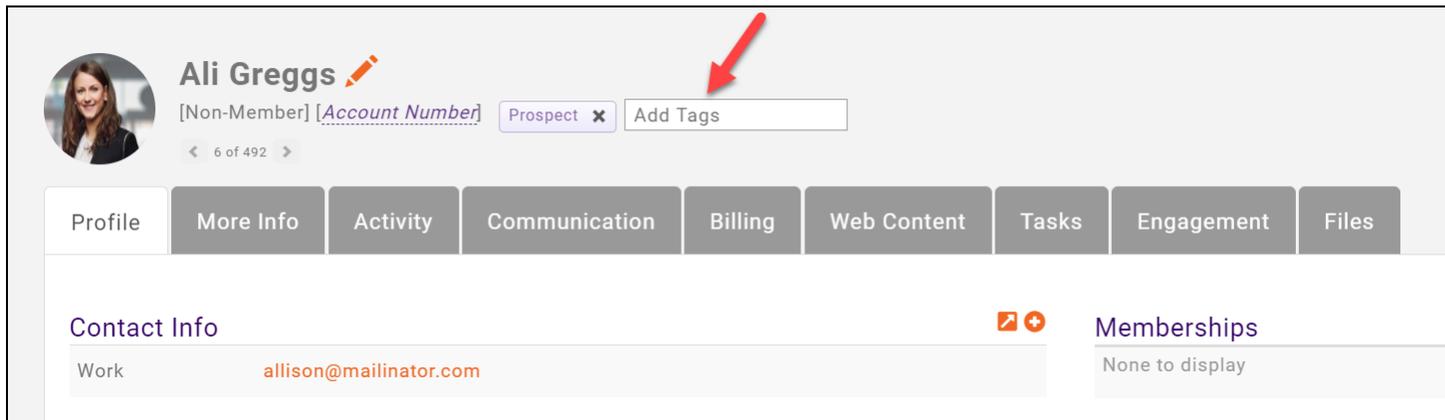
Profile | More Info | Activity | Communication | Billing | Web Content | Tasks | Engagement | Files

Contact Info  
Work allison@mailinator.com

Memberships
None to display

Contact Tags

- Tags are for “internal use” only and may be used to segment records into groups. For example: Minority owned, Hot Prospect, Volunteers.
- Tags are generally a way to track information “temporarily”. For example: You may have a tag called “Hot Prospect”, but would remove this tag if the contact became a member
- Tags can be used in filtering your report results



The screenshot displays a contact profile for Ali Greggs. The profile includes a circular profile picture, the name "Ali Greggs" with an edit icon, and the status "[Non-Member] [Account Number]". A tag "Prospect" is currently applied to the contact. A red arrow points to the "Add Tags" button, which is located next to the tag. Below the profile information, there is a navigation bar with tabs for Profile, More Info, Activity, Communication, Billing, Web Content, Tasks, Engagement, and Files. The "Contact Info" section shows a work email address "allison@mailinator.com". The "Memberships" section indicates "None to display".

Contact - Profile



Monets Landscaping

[Active] [Account Number]

Profile

More Info

Individuals

Activity

Communication

Billing

Web Content

Tasks

Files

Contact Info

Other monet@mailinator.com

Contacts

Claude Monet	Staff - Guest	Active
Jaques Monet		Active
James Johnson		Active
Frank Jones		Active
Layrence Monet		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

General Membership	Active	1 year, 3 months	Actions
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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

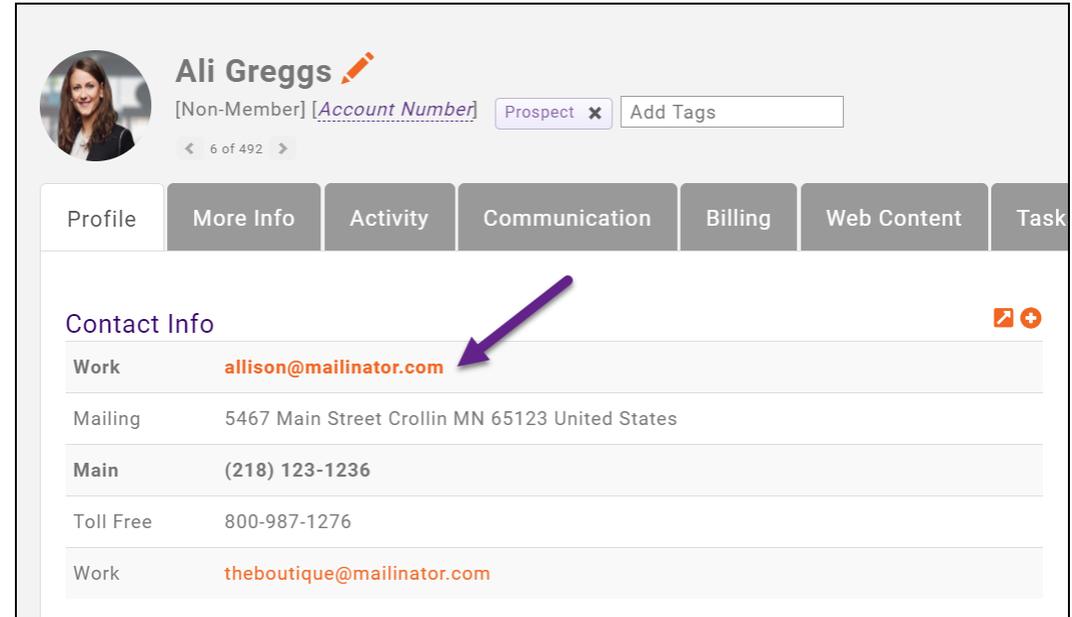
12/28/2018 11:02 AM	SAVE THE DATE - VALENTINES DAY DANCE	CP	0
12/27/2018 8:41 AM	Event Invite	CP	0
12/18/2018 10:00 AM	Volunteers Needed	CP Volunteer	0
12/4/2018 11:03 AM	SAVE THE DATE - Main Street Tree Trimming	CP	0
11/2/2018 11:03 AM	SAVE THE DATE - FALL TOUR	CP	0


Actions



Default Contact Information

- When adding a new contact, be certain to select the appropriate defaults
- In general, the first phone, address, email will be marked as the **default** and will be used in email templates, documents, and when sending communications
- It is also important to select the appropriate “type” as directory listings can be designed to display a particular type of contact information, i.e. physical address



Ali Greggs 
[Non-Member] [Account Number] Prospect
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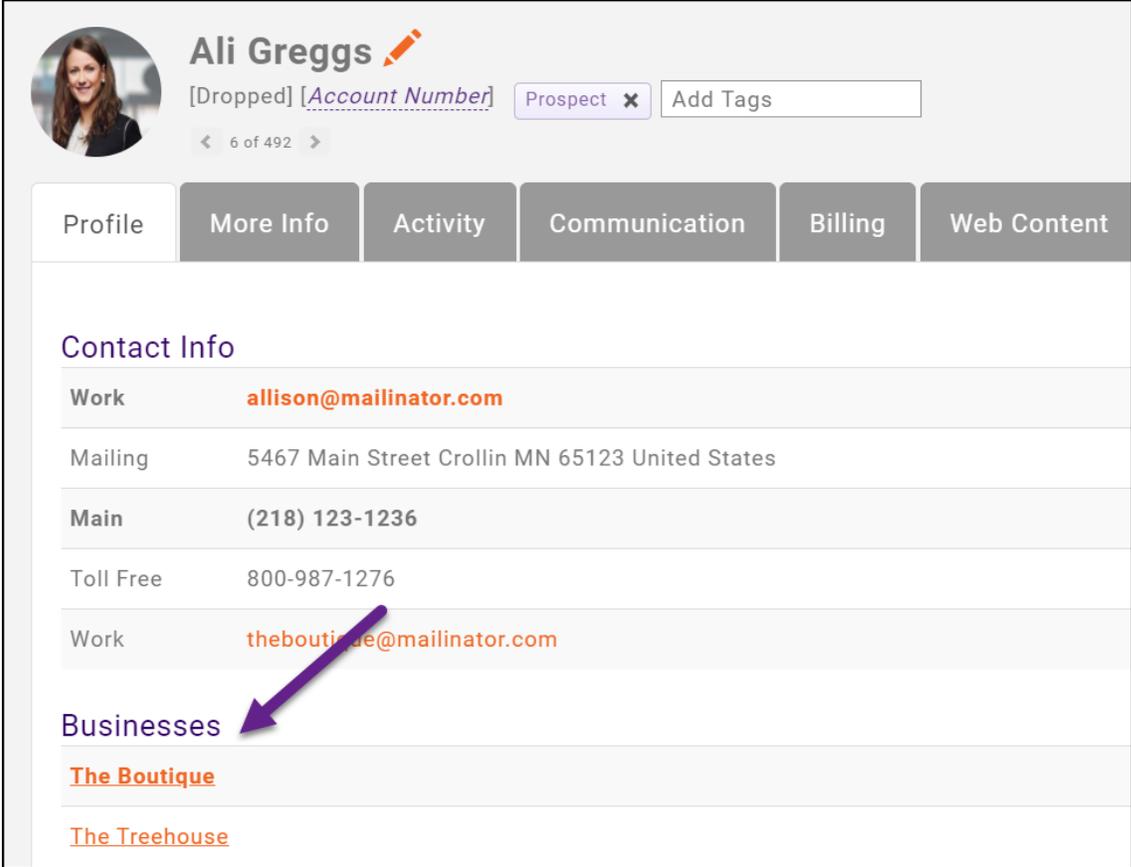
Profile More Info Activity Communication Billing Web Content Task

Contact Info 

Work	allison@mailinator.com
Mailing	5467 Main Street Crollin MN 65123 United States
Main	(218) 123-1236
Toll Free	800-987-1276
Work	theboutique@mailinator.com

Businesses/Individual Relationships

- For a business, you will manage the individuals related to that business and for an individual you will manage the businesses to which the individual is related



Ali Greggs 
[Dropped] [Account Number] Prospect < 6 of 492 >

Profile More Info Activity Communication Billing Web Content

Contact Info

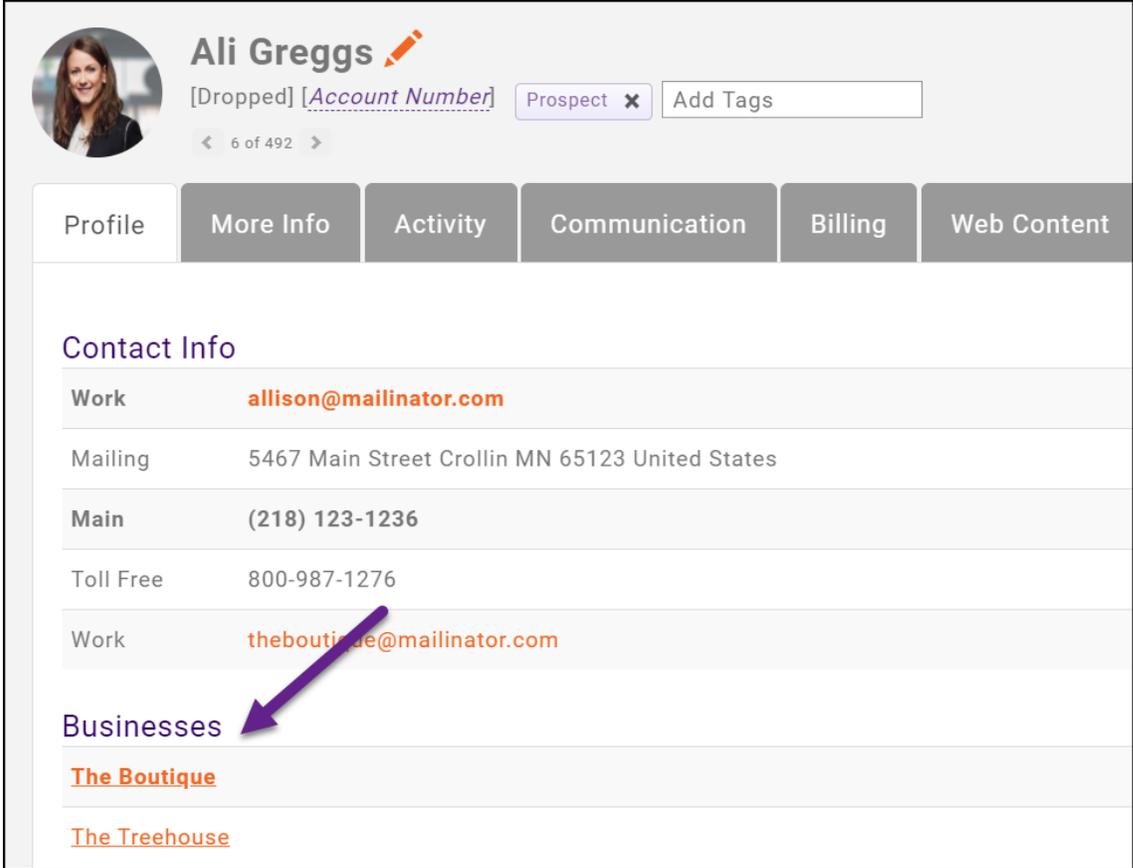
Work	allison@mailinator.com
Mailing	5467 Main Street Crollin MN 65123 United States
Main	(218) 123-1236
Toll Free	800-987-1276
Work	theboutique@mailinator.com

Businesses

- [The Boutique](#)
- [The Treehouse](#)

Businesses/Individual Relationships

- **For Example:** If an individual leaves one business, but joins another, you can reflect this in your database OR if an individual belongs to several businesses, this is also reflected and you only need one record for that individual



Ali Greggs 
[Dropped] [\[Account Number\]](#) Prospect
6 of 492

Profile More Info Activity Communication Billing Web Content

Contact Info

Work	allison@mailinator.com
Mailing	5467 Main Street Crollin MN 65123 United States
Main	(218) 123-1236
Toll Free	800-987-1276
Work	theboutique@mailinator.com

Businesses

- [The Boutique](#)
- [The Treehouse](#)

Categorizing your contacts is a way to:

- Define where your contacts will be displayed in your Member Directory. For Example: Financial Services
- Track additional information about the contact, with high visibility on the Profile tab. For Example: Languages Spoken
- WIKI: [Setting up Categories](#)

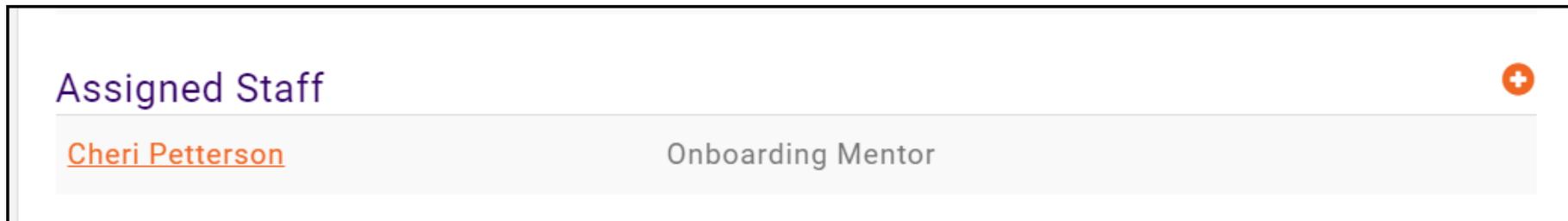
Categories 	
Business Category	Candy Stores; Home & Garden
Ownership	Minority Owned

Assign Staff to Your Contacts

For many reasons you may wish to assign staff to a contact.

- ✓ For Example: If the contact is a prospective member you may wish to assign a salesperson. Or, if the contact is a new member, you may wish to assign a specific staff member to ensure the new member is welcomed and onboarded successfully.
- ✓ Relationship types can also be assigned, which are used for reporting and filtering functions

WIKI: [Assign Staff](#)



Parent/Child Relationship

You may have contacts where a parent account has multiple subsidiary/child accounts For Example: A banking corporation with a national corporate office and then a chain of regional banking centers

Establishing parent/child relationships allow for:

- Cascading the parent membership to a child business. *Relationship type must be setup as “Location”
- Allow the parent business to be indicated as the billing contact for child membership dues
- Allow the parent business to view and pay child business invoices

Child Businesses 			
Organization	City	Type	Actions
The Gallery		Branch	

Parent Businesses 			
Organization	City	Type	Actions
The Diner	Crosby	Branch	

More Info – Custom Fields

Custom Fields are a great way to track additional information about your contacts. For example, perhaps you wish to track certain demographics, such as industry, or annual revenue. Custom Fields are found on the More Info tab for a contact. Here you can view and populate previously created custom fields or add new fields

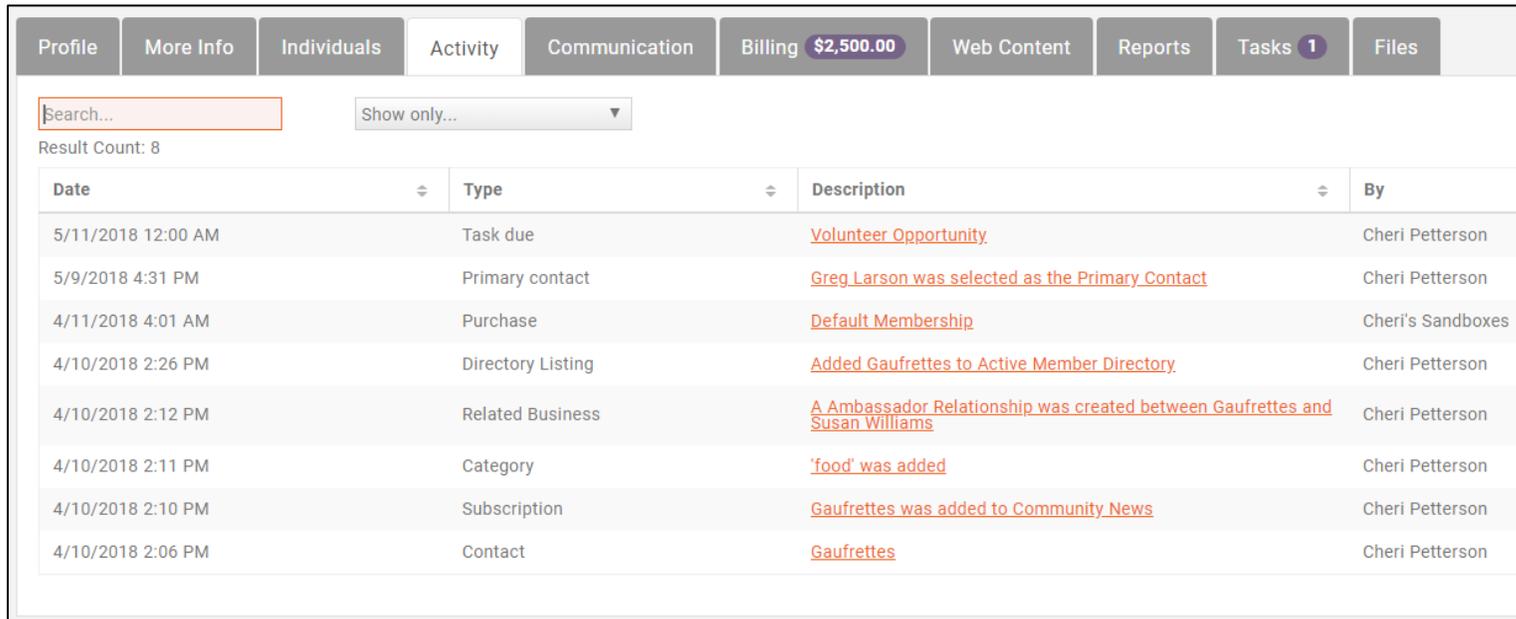
WIKI: [Custom Fields](#)

Business Info		
Number of Employees 2021	<input type="text"/>	
Revenue - Annual	<input type="text"/>	
Employment		
Number of Employees	<input type="text"/>	
Square Foot	<input type="text"/>	
Annual Revenue	<input type="text"/>	
Annual Revenue 2019	<input type="text"/>	
New License	<input type="text"/>	
Zoominfo all employee size 2020	<input type="text"/>	

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.



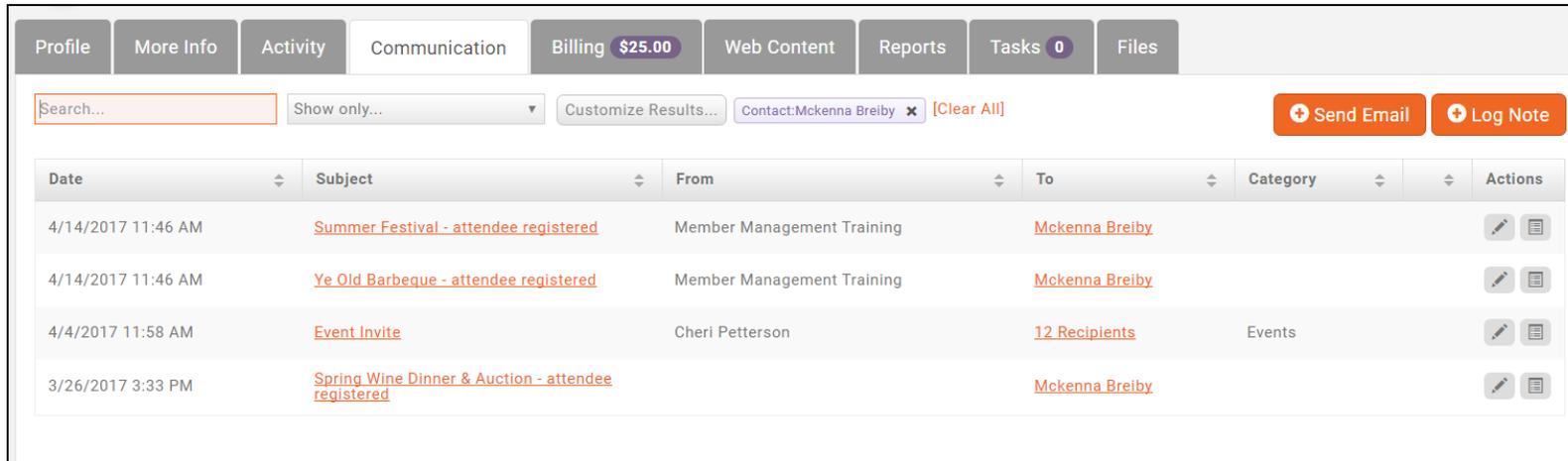
The screenshot shows the 'Activity' tab in the GrowthZone software. The interface includes a navigation bar with tabs for Profile, More Info, Individuals, Activity (selected), Communication, Billing (\$2,500.00), Web Content, Reports, Tasks (1), and Files. Below the navigation bar is a search field and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

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		 

Contact Info Hub Access

Setup Info Hub Access

Edit User Access

Access Level i
User - Primary

Access Level with Associated Organizations

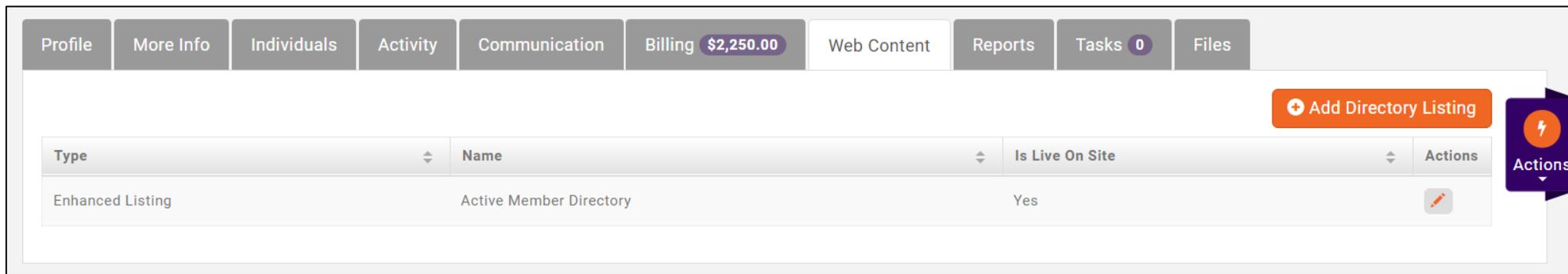
Organization Name Monets Landscaping	Access Level -- Select a Access Level --
Test Business	User - Guest

Cancel Done

More Info/Web Content

Display in your Member Directory is a great benefit that you can offer to your members. Directory listing information can be updated on the Web Content tab.

WiKI: [Web Content Tab](#)



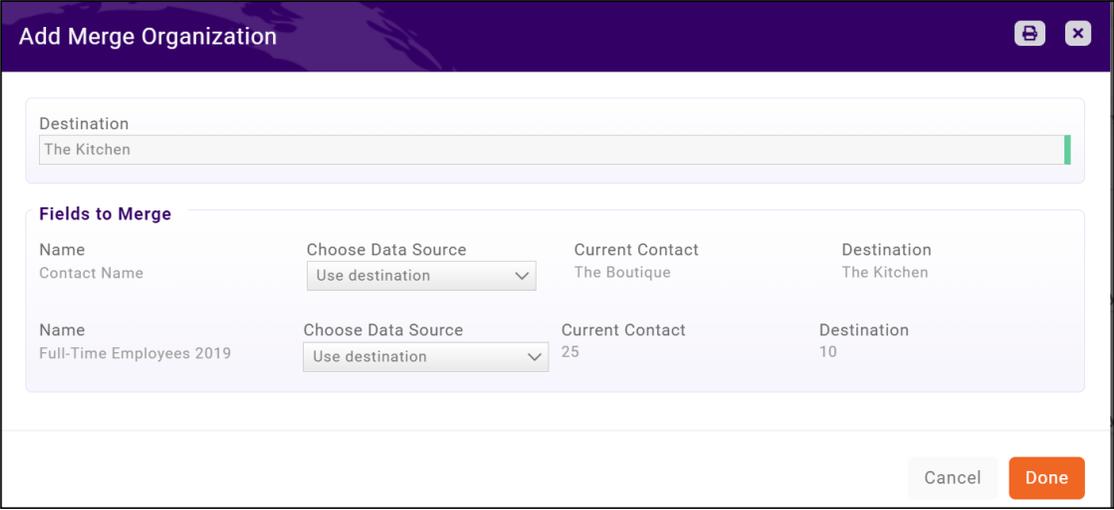
The screenshot shows the 'Web Content' tab selected in a software interface. The top navigation bar includes tabs for Profile, More Info, Individuals, Activity, Communication, Billing (\$2,250.00), Web Content, Reports, Tasks (0), and Files. An orange button labeled '+ Add Directory Listing' is positioned above a table. The table has columns for Type, Name, Is Live On Site, and Actions. A single row is visible with the following data: Type: Enhanced Listing, Name: Active Member Directory, Is Live On Site: Yes, and an edit icon in the Actions column. A purple 'Actions' dropdown menu is open on the right side of the table.

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

Merge Contacts

In the event that you have duplicate individual contacts in your database, you can use the Merge Contacts function to combine the contacts together. All information, billing history, communications, activity, etc. will be merged to the destination contact.

Wiki: [Merge Contacts](#)



Add Merge Organization

Destination
The Kitchen

Fields to Merge

Name	Choose Data Source	Current Contact	Destination
Contact Name	Use destination	The Boutique	The Kitchen
Full-Time Employees 2019	Use destination	25	10

Cancel Done

Questions?