GrowthZone: What's New and Managing Your Store

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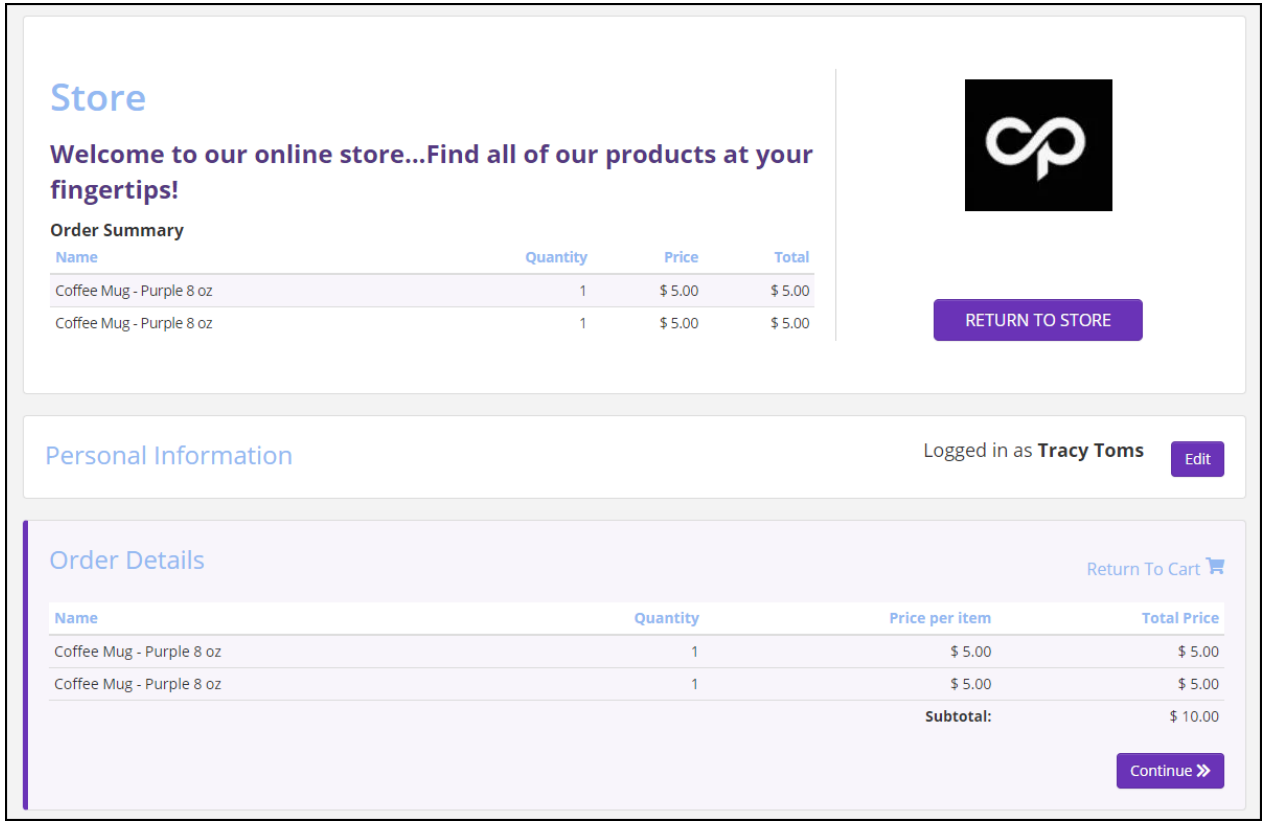
Agenda

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



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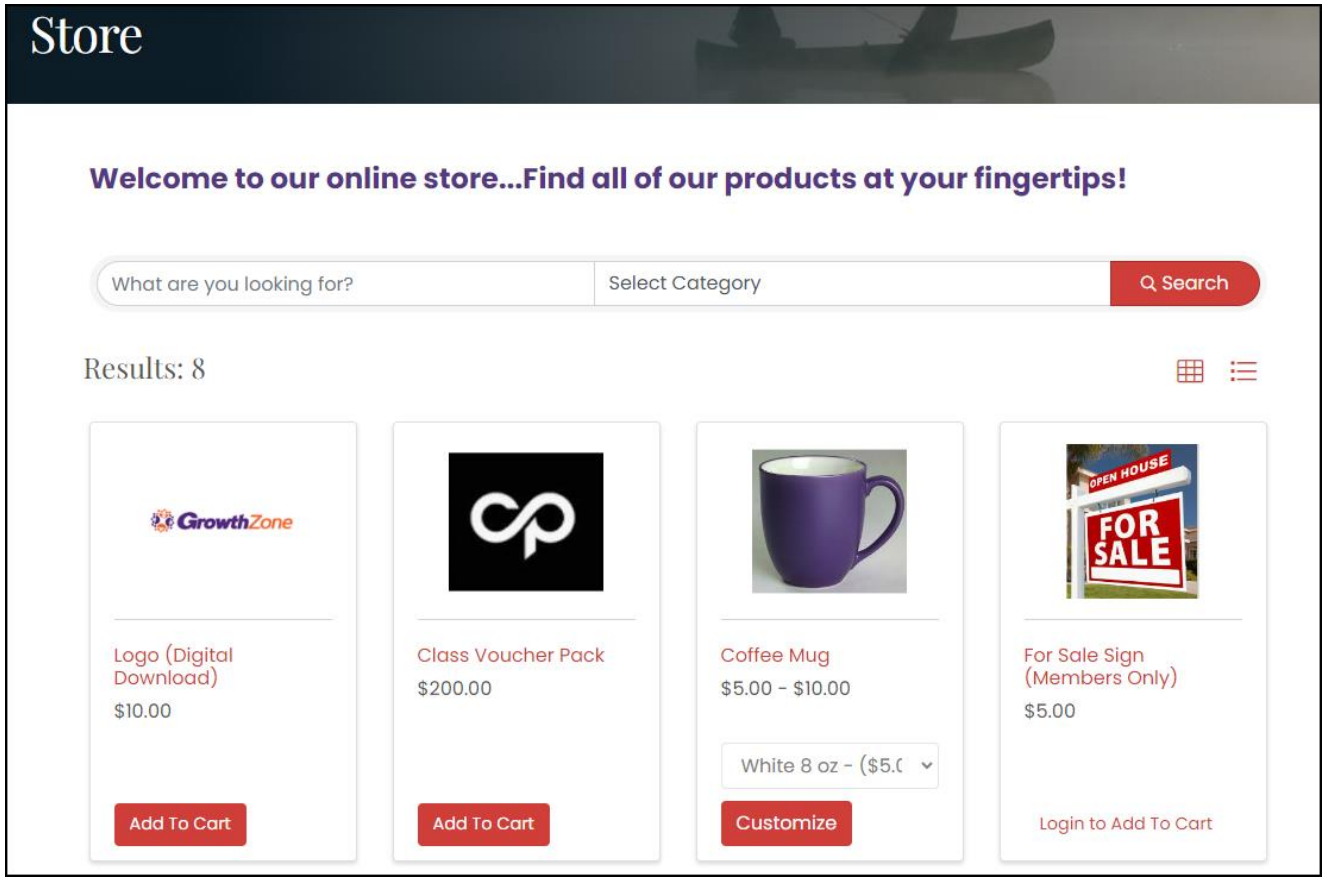
Overview

- Sell additional resources or products to members and non-members
- Sell, process, and fulfill orders directly from the database

KB: CONTENTS - Store



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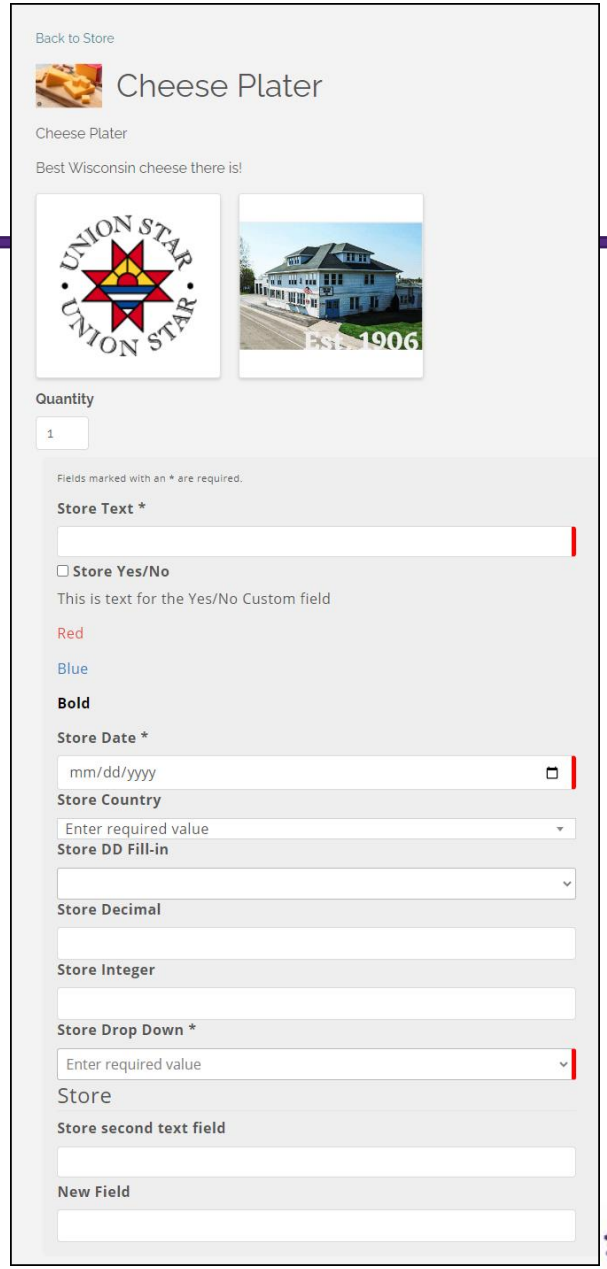
New! Allow Customization

Store now has the ability to customize products!

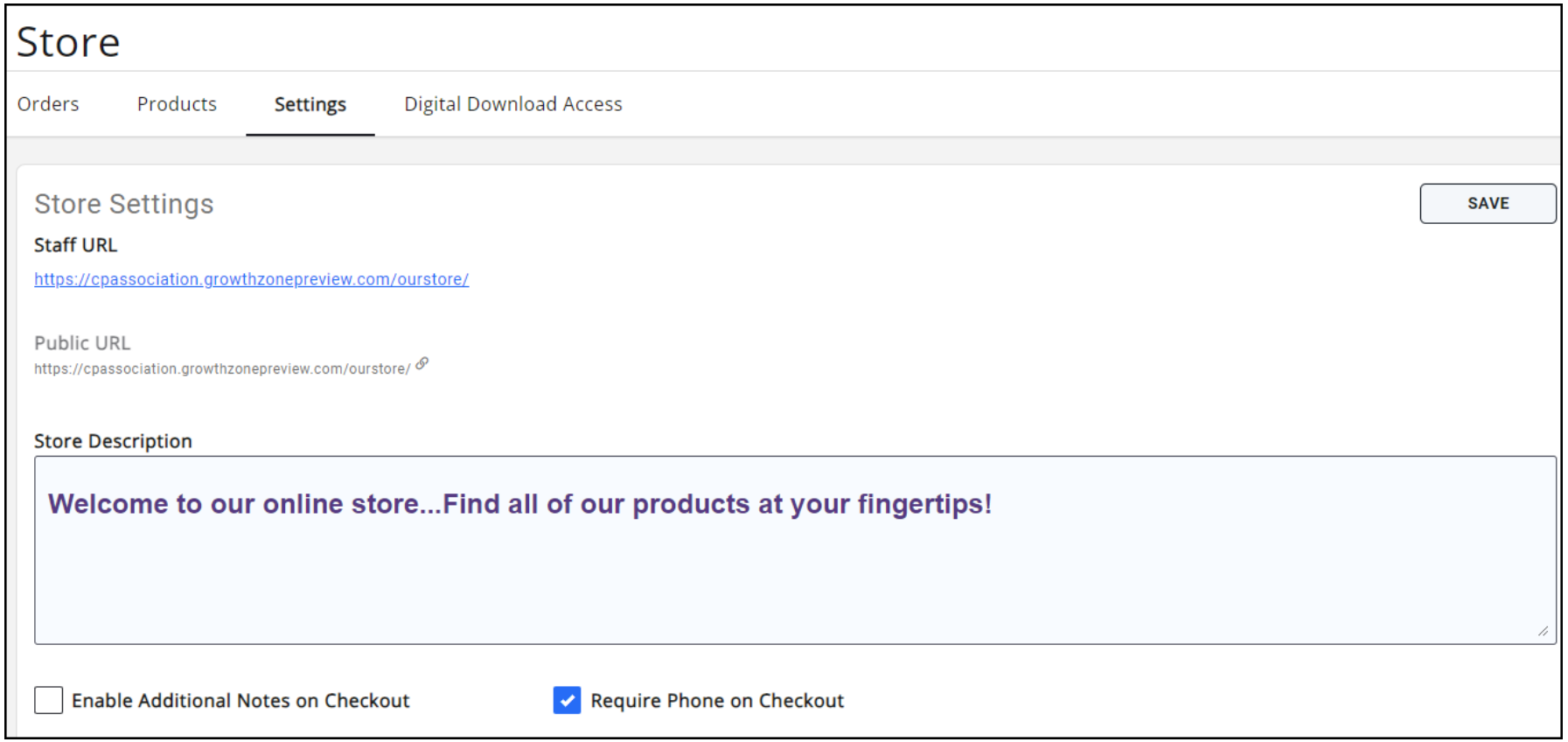
You can allow customization from Store settings, choose what type of customization is allowed and let customers add their own information from the product page!

KB: Store Customization



Getting Started

- ✓Store Categories
- ✓Shipping Options
- ✓ General Settings & Fee Items



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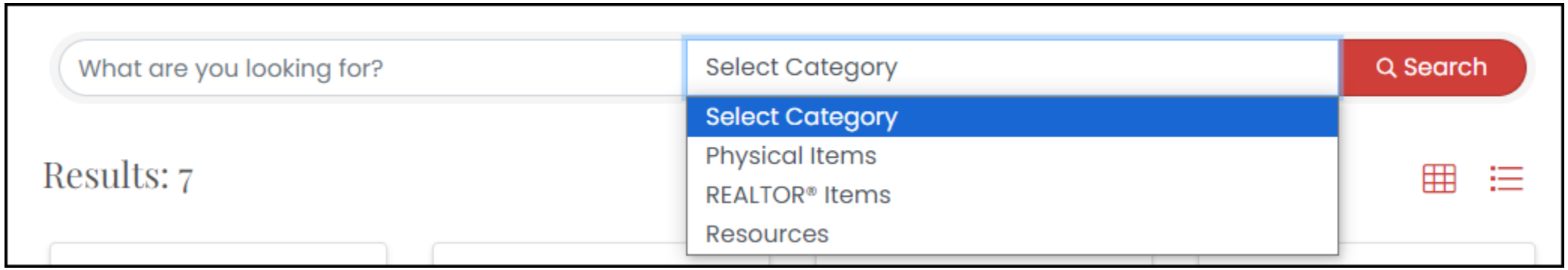
Store Categories

Using categories in your store will make it easy for visitors to your store to find just what they are looking for.

Setting up your store categories is a two-step process, first you will setup the category list, then you will add the categories to that list.



KB: Set Up Store Categories

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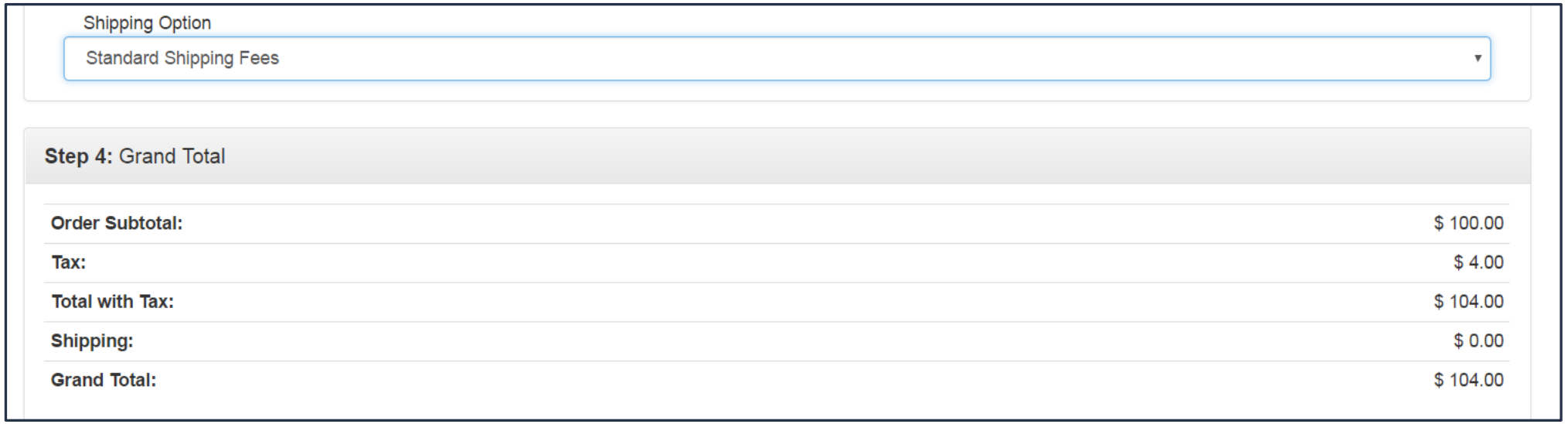
Shipping Options

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

KB: Setting up Shipping Options



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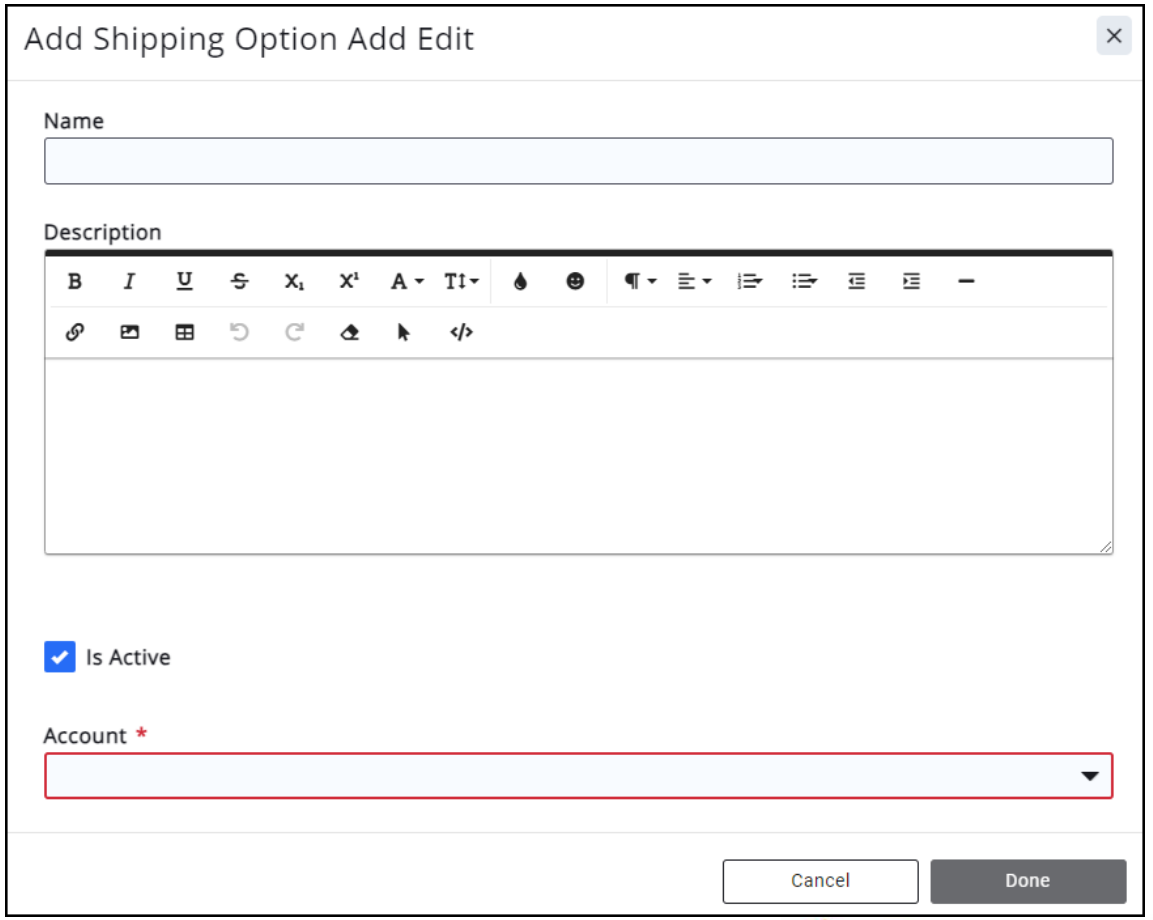
Shipping Options

Add active shipping choices and choose the correct revenue account to credit for the shipping fees

Note: Be sure to set up an income account for the shipping revenue!

KB: Set-up Shipping Options



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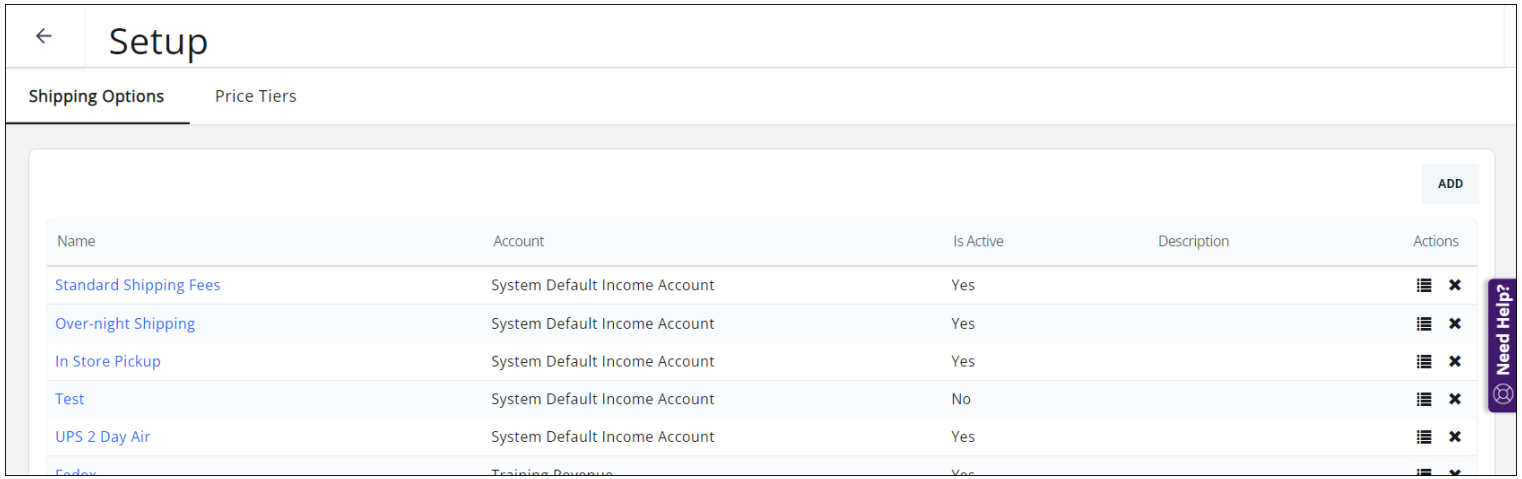
Shipping Options

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

1. Set up pricing tiers under Finance > Shipping
2. Associate tiers to the shipping options



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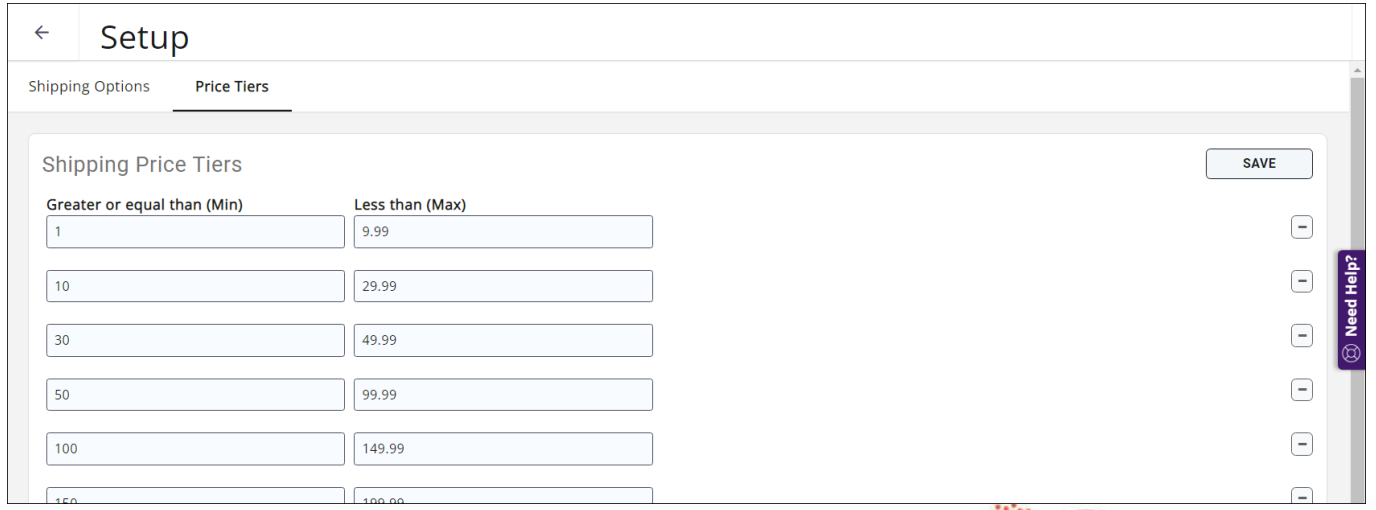
Shipping Options

Setting up Tiers

- Add **Price Tiers** to set up your shipping price thresholds

- Each item in the Price Tier is a price range with a minimum and a maximum value



KB: Set-up Shipping Options

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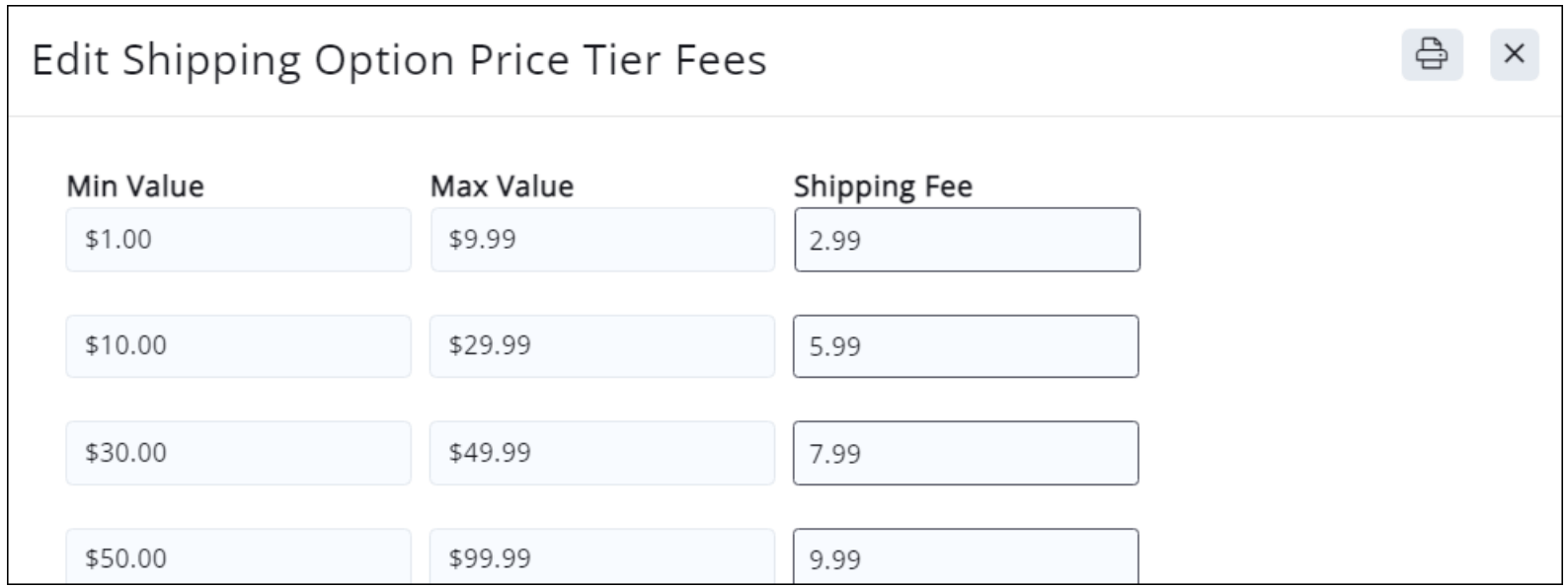
Shipping Options

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



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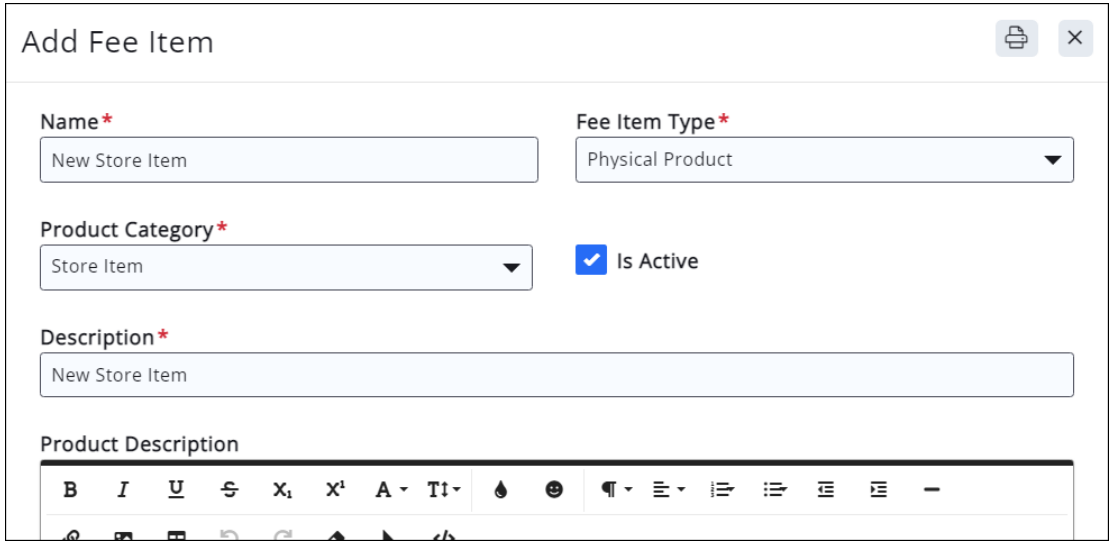
Setup Fee Items for Store Products

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



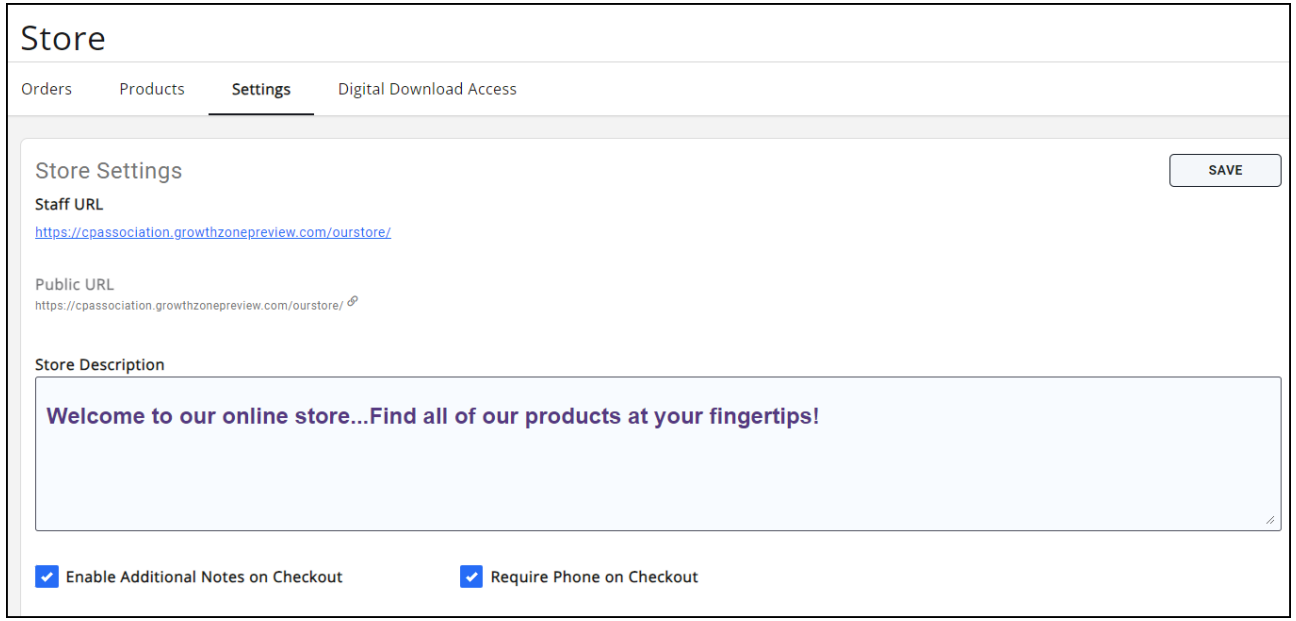
Store General Settings

URL

- Generated after a page is created for website
- Use the public URL to view the store without staff credentials

Description

- Appears front-facing on website



KB: Set up Store General Settings
KB: Set up Store Page for Website

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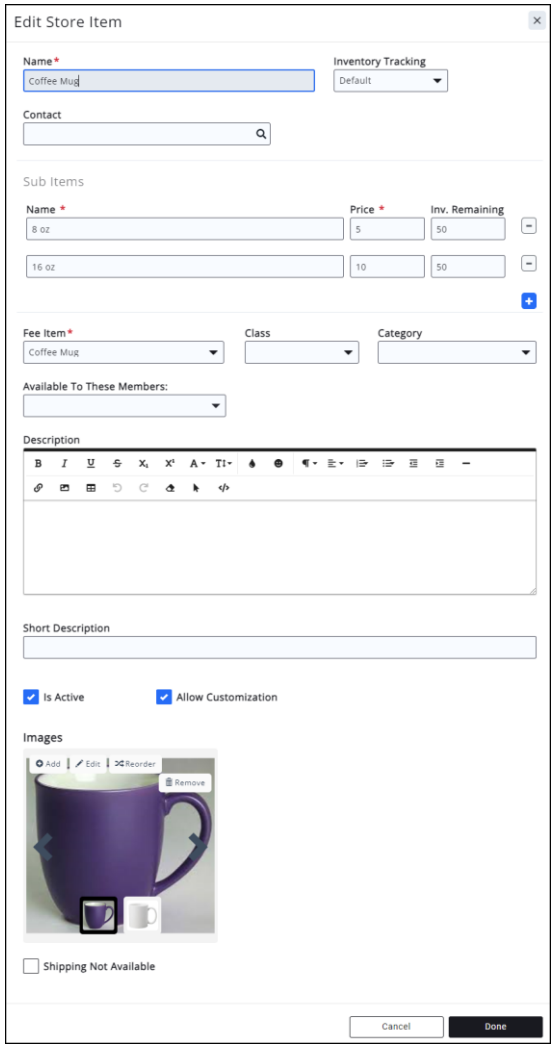
Add Physical Products to Your Store



Your Store Module can assist you in managing attributes for physical product, such as size, color, and customization

In addition, you will be able track available inventory

KB: Add Physical Products to Your Store

KB: FIFO Store Inventory Management

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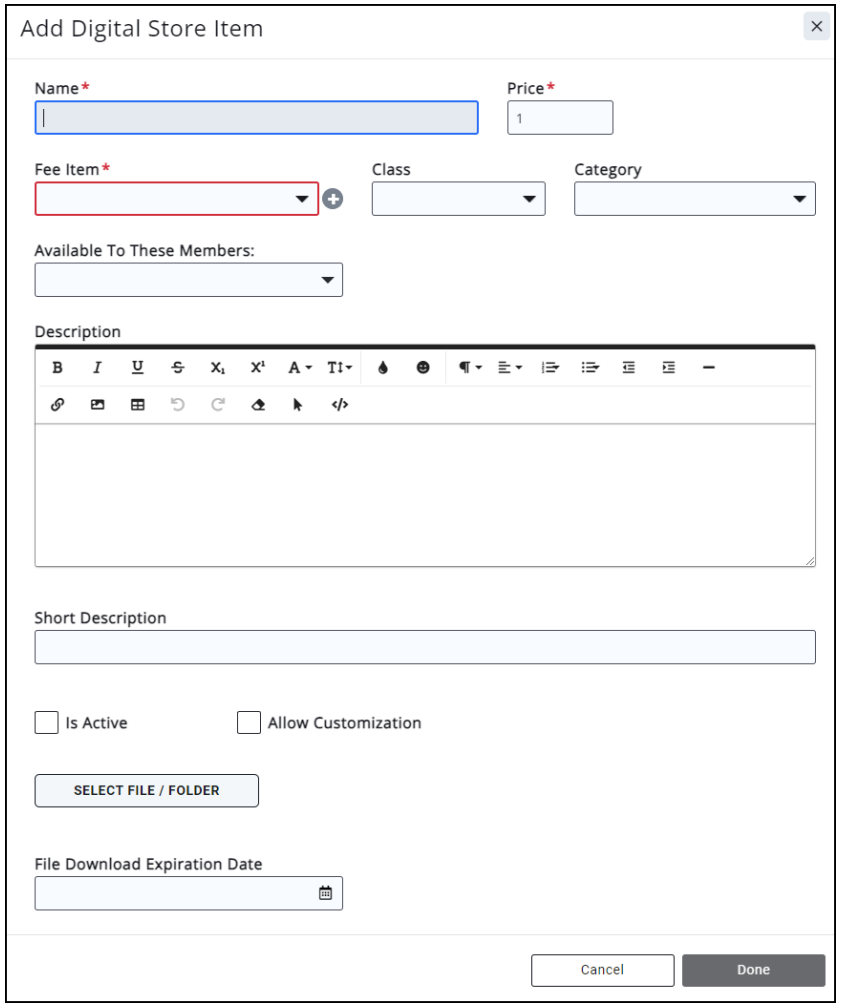
Add Digital Products to Your Store



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

KB: Add Digital Downloads

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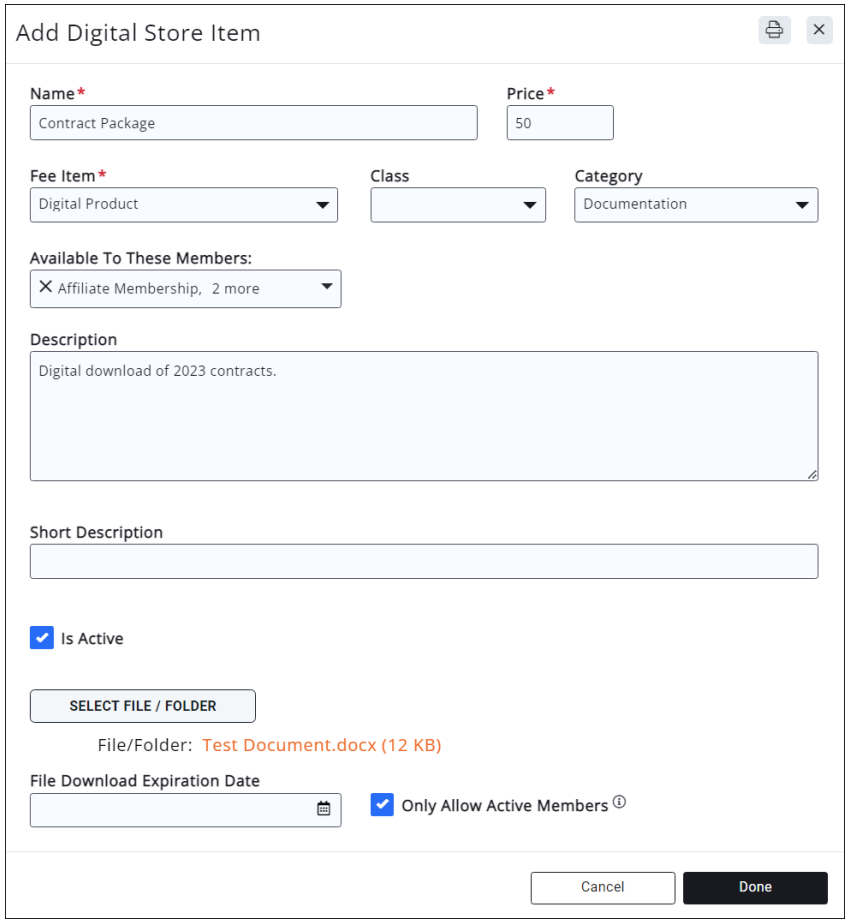
Add Digital Products to Your Store

Pre-requisites:

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

KB: Add Digital Downloads



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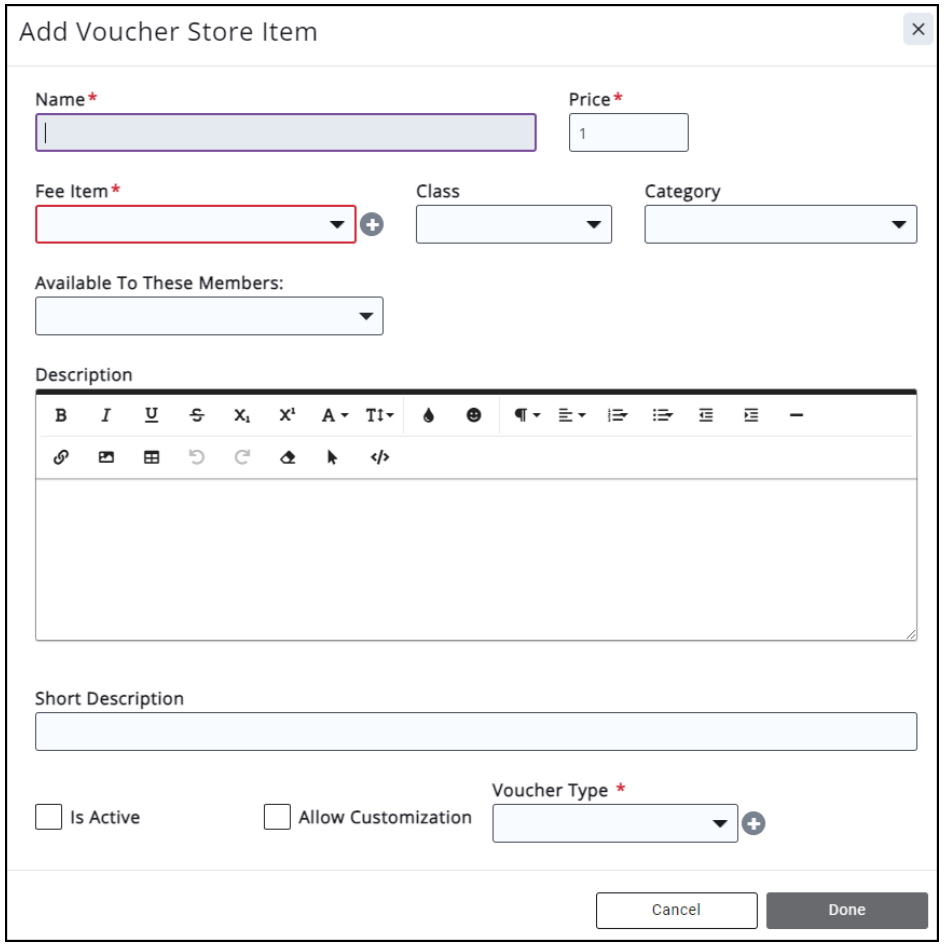
Add Event Vouchers



The Voucher feature provides the ability for an association to sell a pack of event tickets to events with a specific category.

KB: Add Event Vouchers

KB: Working with Vouchers

KB: Selling Vouchers to register for Events

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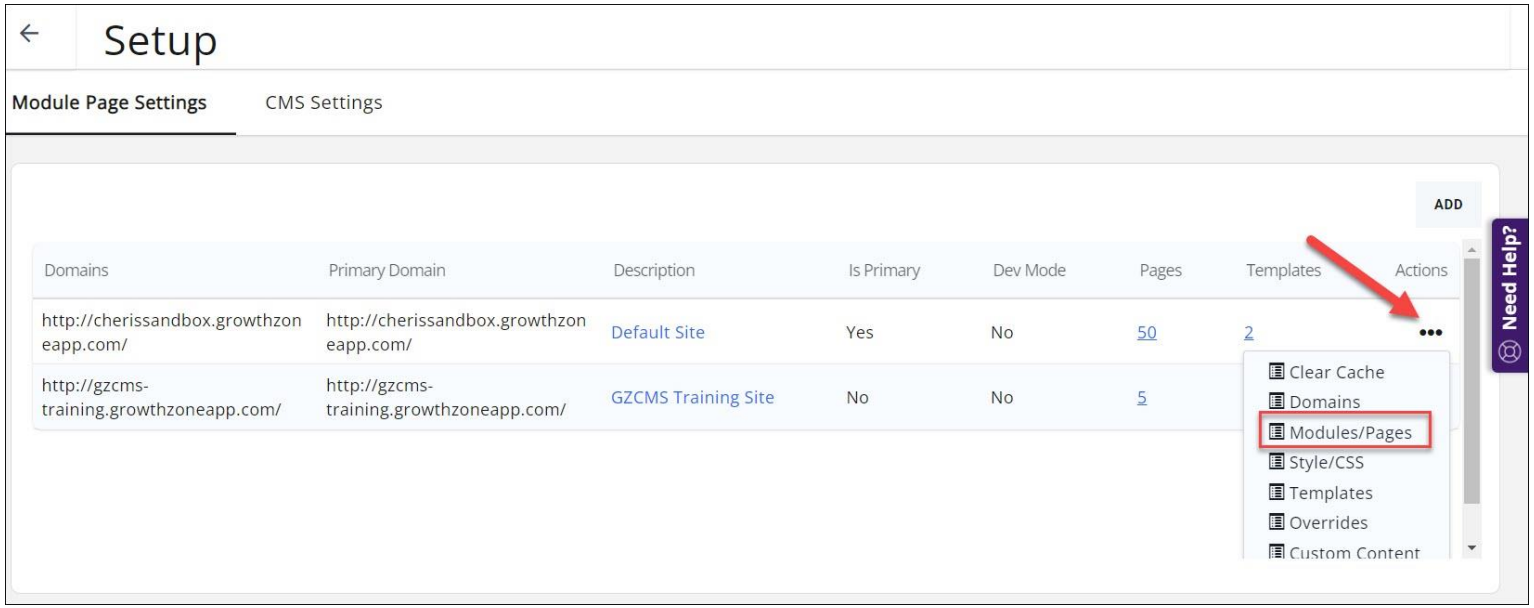
Add Store to Your Website

Enable an integrated page

Include:

- Site Module Type > Store
- Title
- Relative Path
- Copy the URL to paste into your website settings



KB: Set up Store Page for Website
KB: Add Store to Your Website

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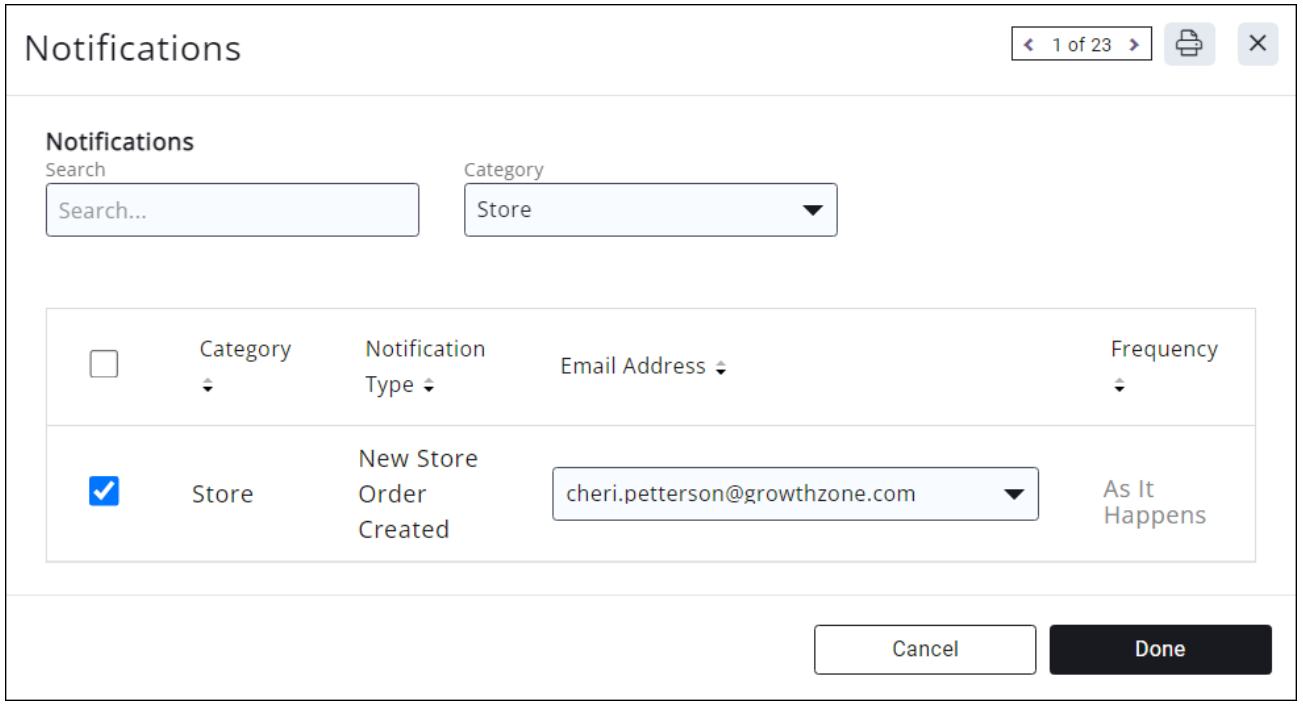
Managing Your Store Orders



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

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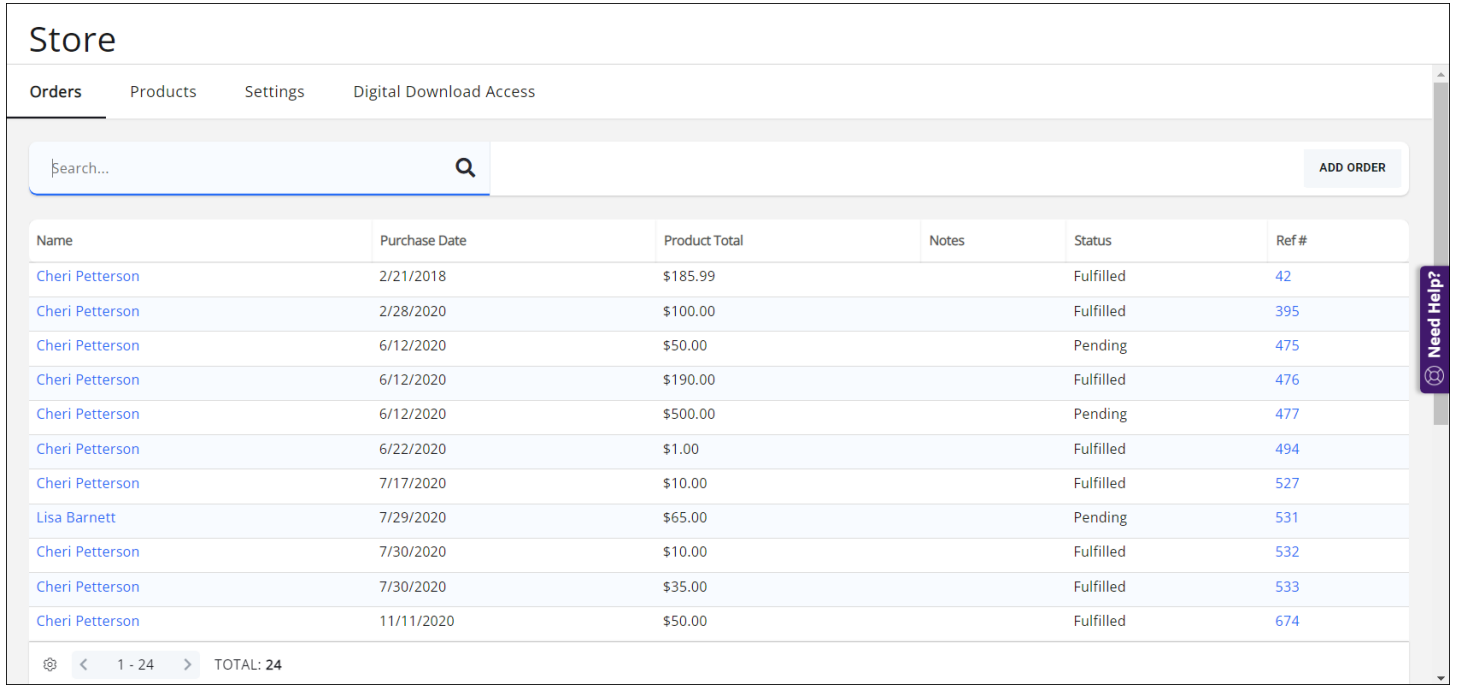
Managing Your Store Orders

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



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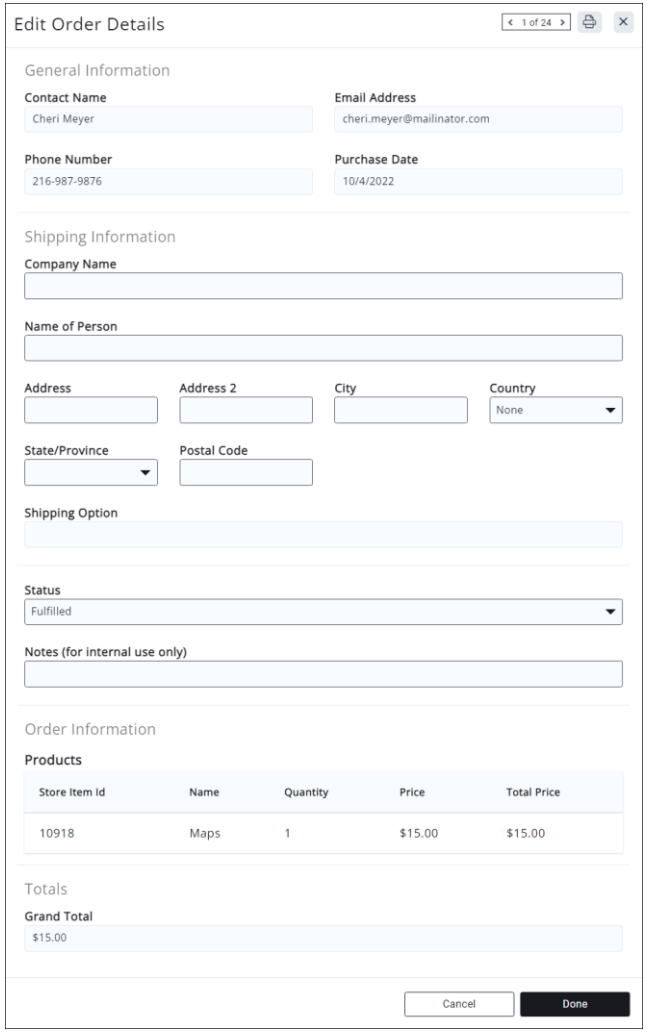
Fulfilling Store Orders



Use the **Reference Number** hyperlink for sale information and to view an notes sent from the purchaser.

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

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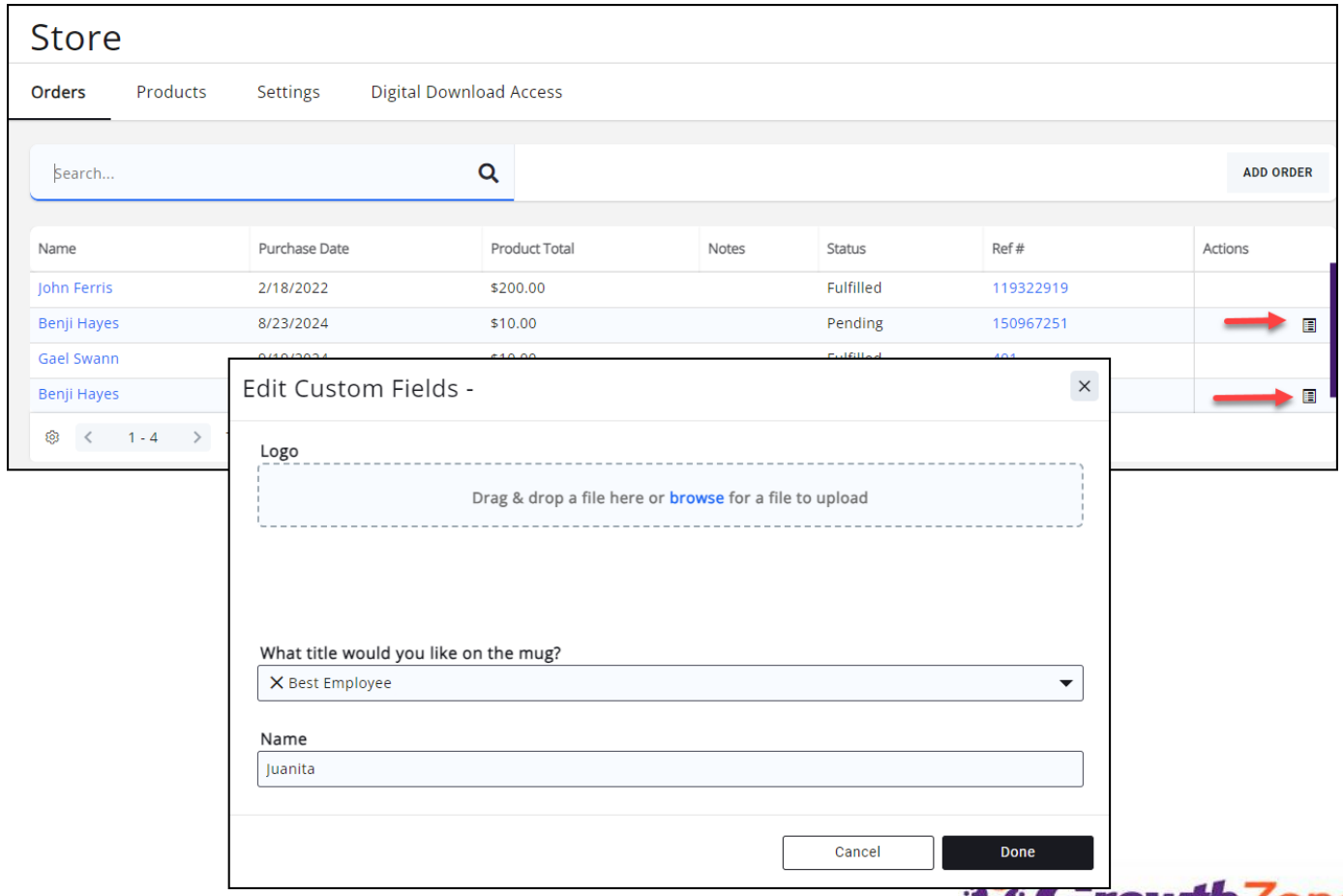
Customized Products

Review specific customization details under the Actions column

KB: Store Customization



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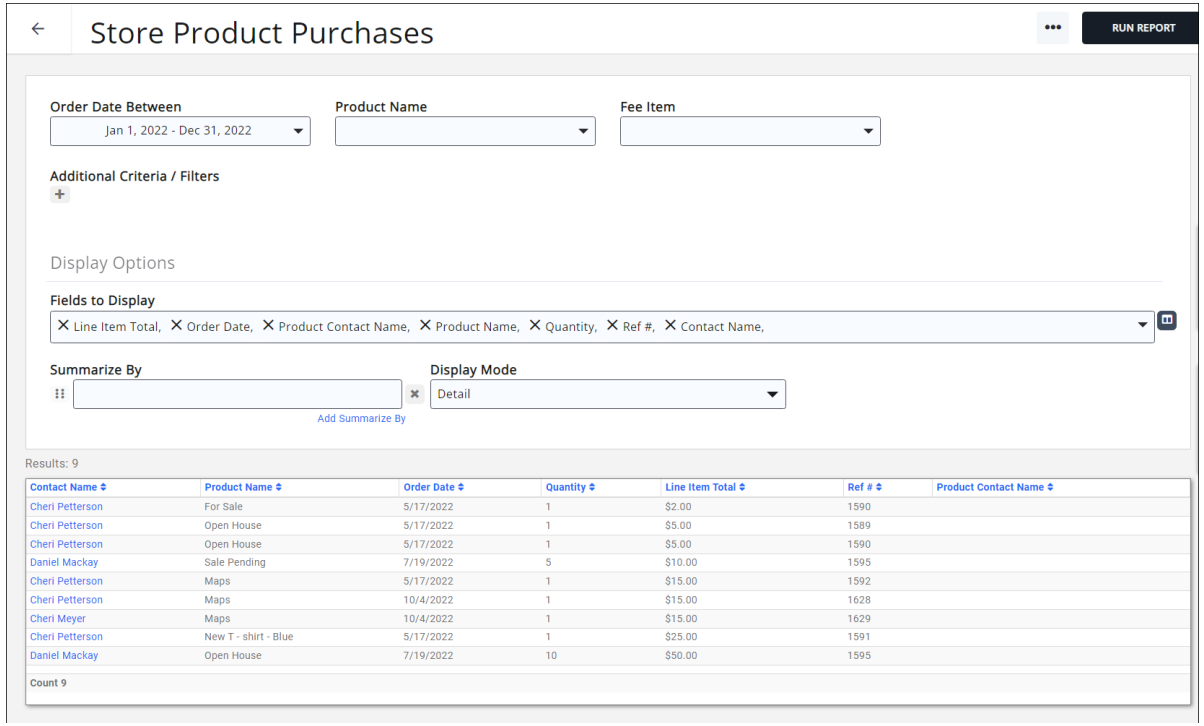
Store Reports

The **Store Product Purchases** report will generate a list of all product sold through your store. It can display custom field selections also.

KB: Store Product Purchases Report



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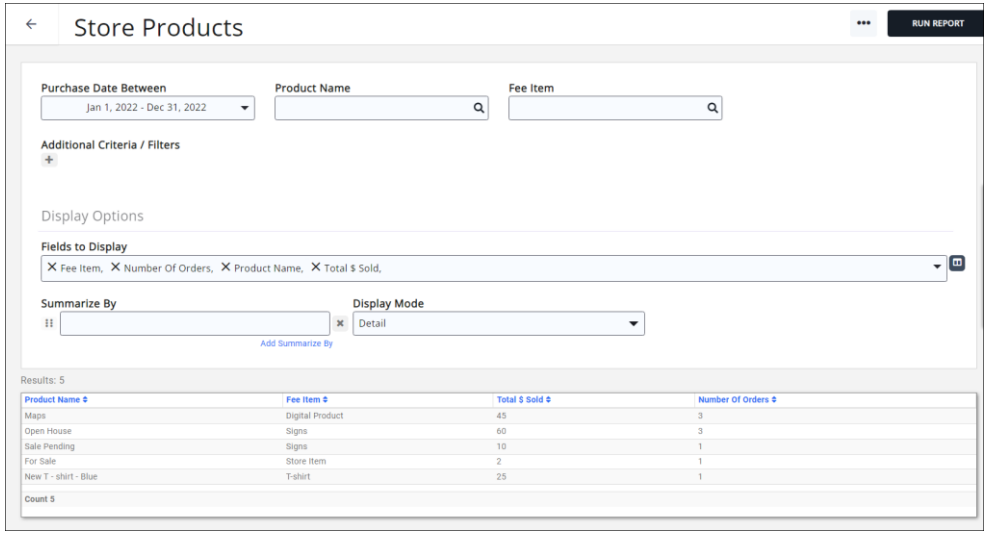
Store Reports

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

KB: Store Products Report



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Questions?

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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) »

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