

GrowthZone: What's New and Managing Your Store

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

Store

Welcome to our online store...Find all of our products at your fingertips!



[RETURN TO STORE](#)

Order Summary

Name	Quantity	Price	Total
Coffee Mug - Purple 8 oz	1	\$ 5.00	\$ 5.00
Coffee Mug - Purple 8 oz	1	\$ 5.00	\$ 5.00

Personal Information

Logged in as **Tracy Toms** [Edit](#)

Order Details

[Return To Cart](#) 

Name	Quantity	Price per item	Total Price
Coffee Mug - Purple 8 oz	1	\$ 5.00	\$ 5.00
Coffee Mug - Purple 8 oz	1	\$ 5.00	\$ 5.00
Subtotal:			\$ 10.00

[Continue >>](#)

Overview

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

KB: [CONTENTS - Store](#)

The screenshot displays the 'Store' page of the GrowthZone software. At the top, a dark header contains the word 'Store' in white. Below this, a white banner reads 'Welcome to our online store...Find all of our products at your fingertips!'. A search bar is positioned below the banner, featuring a placeholder 'What are you looking for?', a 'Select Category' dropdown, and a red 'Search' button with a magnifying glass icon. The search results are displayed as 'Results: 8'. Four product cards are shown in a grid. The first card features the GrowthZone logo and is titled 'Logo (Digital Download)' with a price of '\$10.00' and a red 'Add To Cart' button. The second card shows a black square with a white infinity symbol, titled 'Class Voucher Pack' with a price of '\$200.00' and a red 'Add To Cart' button. The third card shows a purple mug, titled 'Coffee Mug' with a price range of '\$5.00 - \$10.00', a dropdown menu set to 'White 8 oz - (\$5.00)', and a red 'Customize' button. The fourth card shows a red 'FOR SALE' sign on a white post, titled 'For Sale Sign (Members Only)' with a price of '\$5.00' and a 'Login to Add To Cart' link. In the bottom right corner of the screenshot, the GrowthZone logo and tagline 'smarter association software' are visible.

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

Back to Store

 Cheese Plater

Cheese Plater

Best Wisconsin cheese there is!

Quantity

1

Fields marked with an * are required.

Store Text *

Store Yes/No

This is text for the Yes/No Custom field

Red

Blue

Bold

Store Date *

Store Country

Store DD Fill-in

Store Decimal

Store Integer

Store Drop Down *

Store

Store second text field

New Field

Getting Started

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

Store

Orders Products **Settings** Digital Download Access

Store Settings

Staff URL
<https://cpassociation.growthzonepreview.com/ourstore/>

Public URL
<https://cpassociation.growthzonepreview.com/ourstore/>

Store Description

Welcome to our online store...Find all of our products at your fingertips!

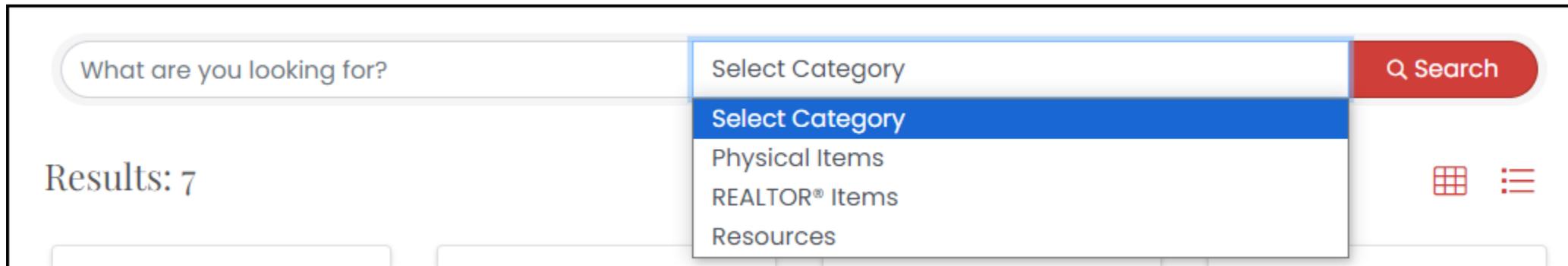
Enable Additional Notes on Checkout Require Phone on Checkout

SAVE

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](#)

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

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](#)

Add Shipping Option Add Edit ✕

Name

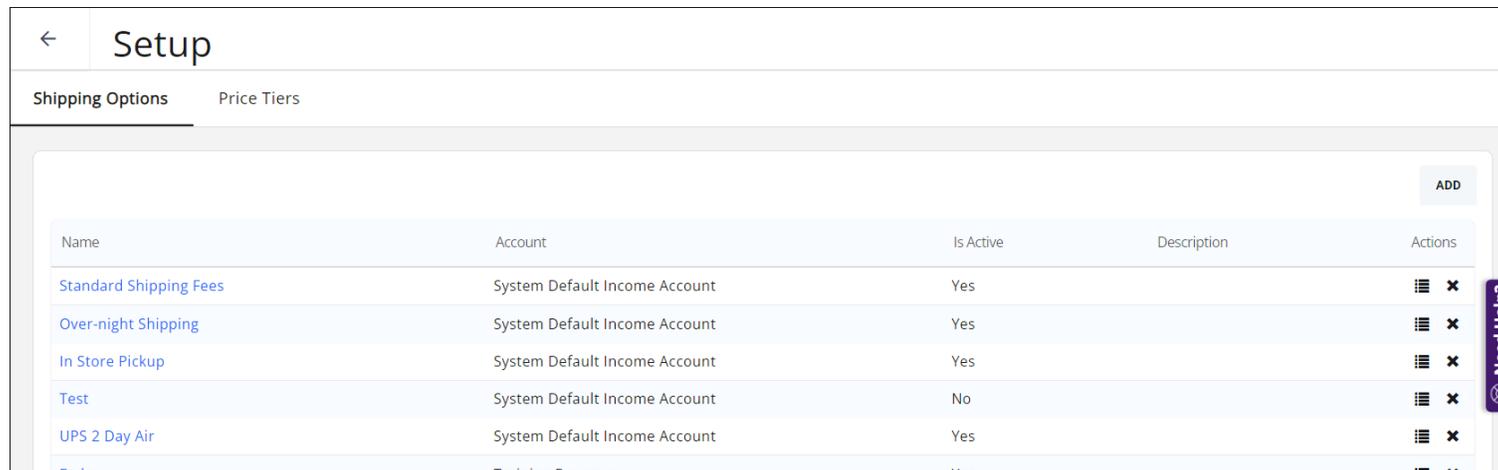
Description

B *I* U ~~S~~ ~~X~~ ~~X'~~ A ▼ T1 ▼               <

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



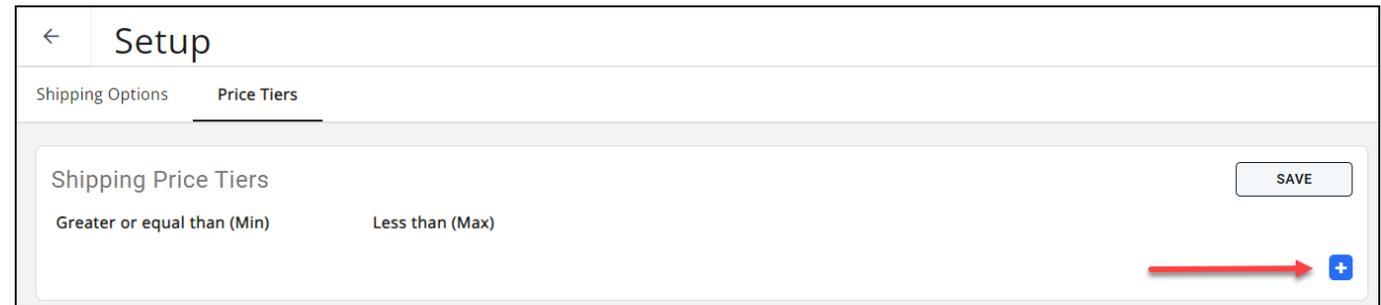
Name	Account	Is Active	Description	Actions
Standard Shipping Fees	System Default Income Account	Yes		⋮ ✕
Over-night Shipping	System Default Income Account	Yes		⋮ ✕
In Store Pickup	System Default Income Account	Yes		⋮ ✕
Test	System Default Income Account	No		⋮ ✕
UPS 2 Day Air	System Default Income Account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

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](#)



Setup

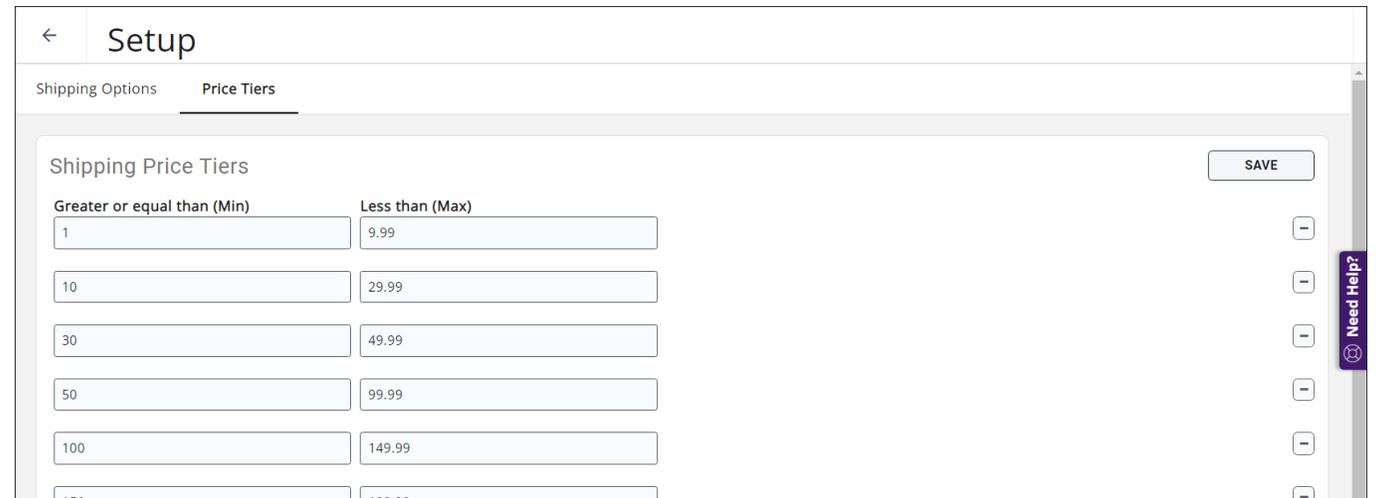
Shipping Options Price Tiers

Shipping Price Tiers

Greater or equal than (Min) Less than (Max)

SAVE

+



Setup

Shipping Options Price Tiers

Shipping Price Tiers

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

SAVE

Need Help?

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

B I U S X₁ X₂ A T₁ T₂ [Icons]

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

Store

Orders Products **Settings** Digital Download Access

Store Settings

Staff URL
<https://cpassociation.growthzonepreview.com/ourstore/>

Public URL
<https://cpassociation.growthzonepreview.com/ourstore/>

Store Description
Welcome to our online store...Find all of our products at your fingertips!

Enable Additional Notes on Checkout Require Phone on Checkout

SAVE

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

KB: [Set up Store Page for Website](#)

Add Physical Products to Your Store

Edit Store Item

Name* Inventory Tracking

Contact

Sub Items

Name *	Price *	Inv. Remaining
8 oz	5	50
16 oz	10	50

Fee Item* Class Category

Available To These Members:

Description

Short Description

Is Active Allow Customization

Images

Shipping Not Available

Cancel Done

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](#)

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* Price*

Fee Item* Class Category

Available To These Members:

Description

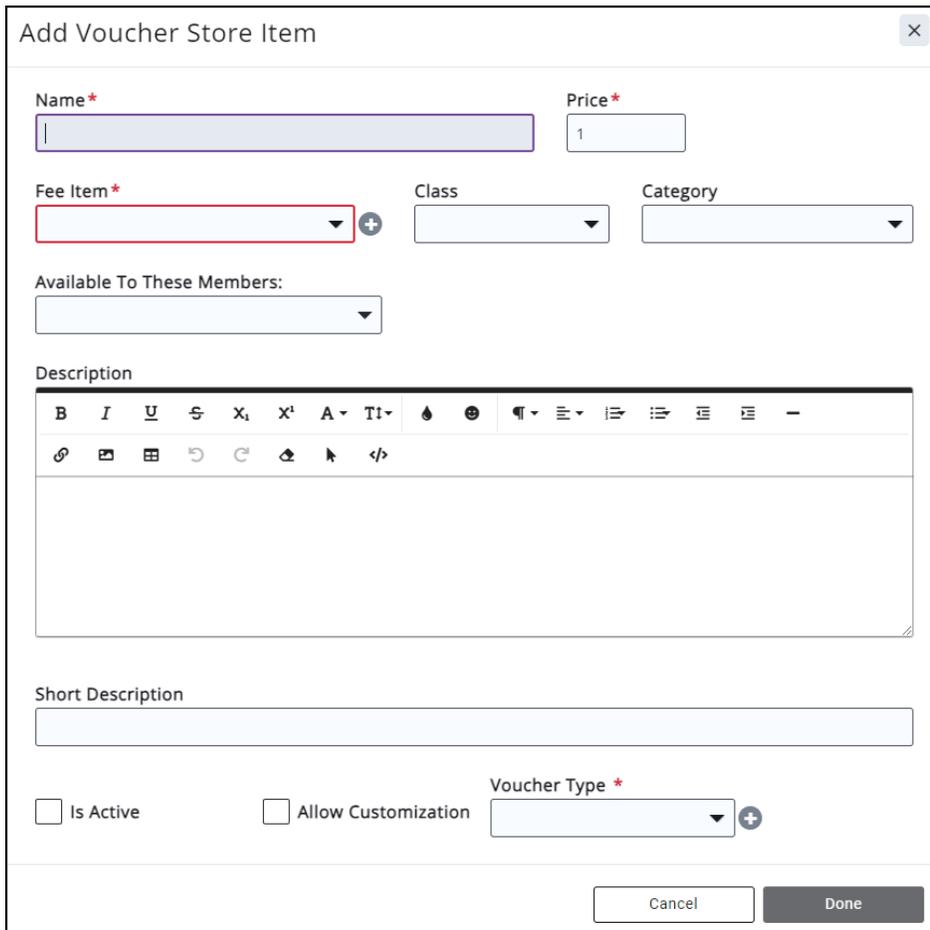
Short Description

Is Active

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

File Download Expiration Date
 Only Allow Active Members [Ⓢ]

Add Event Vouchers



The screenshot shows a web form titled "Add Voucher Store Item" with a close button in the top right corner. The form contains the following fields and controls:

- Name ***: A text input field.
- Price ***: A text input field containing the value "1".
- Fee Item ***: A dropdown menu with a plus sign to its right.
- Class**: A dropdown menu.
- Category**: A dropdown menu.
- Available To These Members:**: A dropdown menu.
- Description**: A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, undo, redo, and source code.
- Short Description**: A text input field.
- Is Active**: A checkbox.
- Allow Customization**: A checkbox.
- Voucher Type ***: A dropdown menu with a plus sign to its right.

At the bottom of the form are two buttons: "Cancel" and "Done".

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](#)

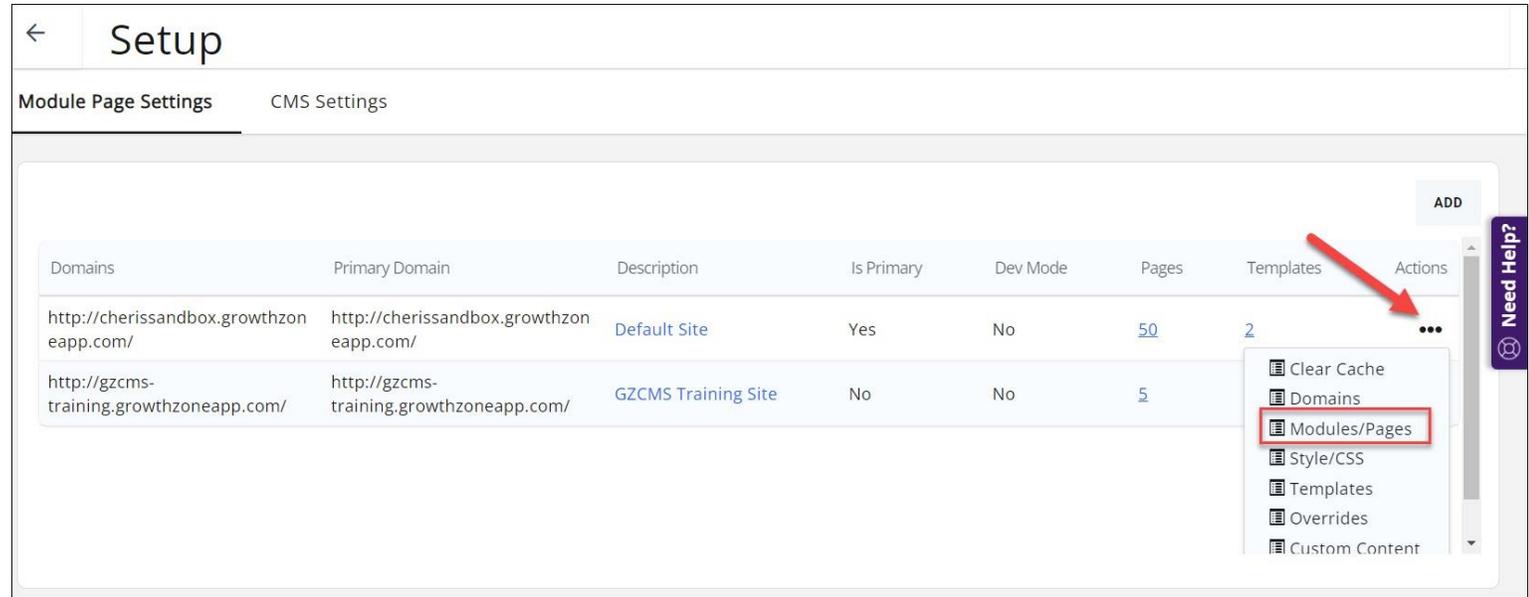
KB: [Selling Vouchers to register for Events](#)

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



The screenshot shows the 'Setup' page in the GrowthZone interface. The 'Module Page Settings' tab is active, displaying a table of domains. A red arrow points to the 'Actions' column for the 'GZCMS Training Site' row. A dropdown menu is open, showing options like 'Clear Cache', 'Domains', 'Modules/Pages', 'Style/CSS', 'Templates', 'Overrides', and 'Custom Content'. The 'Modules/Pages' option is highlighted with a red box.

Domains	Primary Domain	Description	Is Primary	Dev Mode	Pages	Templates	Actions
http://cherissandbox.growthzoneapp.com/	http://cherissandbox.growthzoneapp.com/	Default Site	Yes	No	50	2	...
http://gzcms-training.growthzoneapp.com/	http://gzcms-training.growthzoneapp.com/	GZCMS Training Site	No	No	5		...

KB: [Set up Store Page for Website](#)

KB: [Add Store to Your Website](#)

Managing Your Store Orders

Notifications < 1 of 23 >  

Notifications

Search Category

<input type="checkbox"/>	Category ⌵	Notification Type ⌵	Email Address ⌵	Frequency ⌵
<input checked="" type="checkbox"/>	Store	New Store Order Created	<input data-bbox="662 935 1141 978" type="text" value="cheri.petterson@growthzone.com"/>	As It Happens

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...

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

Fulfilling 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:

State/Province: Postal Code:

Shipping Option:

Status:

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:

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.

Customized Products

Review specific customization details under the Actions column

KB: [Store Customization](#)

The screenshot displays the 'Store' interface with a navigation bar containing 'Orders', 'Products', 'Settings', and 'Digital Download Access'. Below the navigation is a search bar and an 'ADD ORDER' button. A table lists orders with columns for Name, Purchase Date, Product Total, Notes, Status, Ref #, and Actions. The 'Actions' column contains icons for editing and deleting orders, with red arrows pointing to them. A modal window titled 'Edit Custom Fields -' is open, showing a 'Logo' section with a dashed box for file upload, a dropdown menu for 'What title would you like on the mug?' (set to 'Best Employee'), and a text input for 'Name' (set to 'Juanita'). The modal has 'Cancel' and 'Done' buttons at the bottom.

Name	Purchase Date	Product Total	Notes	Status	Ref #	Actions
John Ferris	2/18/2022	\$200.00		Fulfilled	119322919	 
Benji Hayes	8/23/2024	\$10.00		Pending	150967251	 
Gael Swann	8/18/2024	\$10.00		Fulfilled	150967251	 
Benji Hayes						 

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](#)

Store Product Purchases

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

Product Name: [] Fee Item: []

Additional Criteria / Filters: +

Display Options

Fields to Display: X Line Item Total, X Order Date, X Product Contact Name, X Product Name, X Quantity, X Ref #, X Contact Name

Summarize By: [] Display Mode: Detail

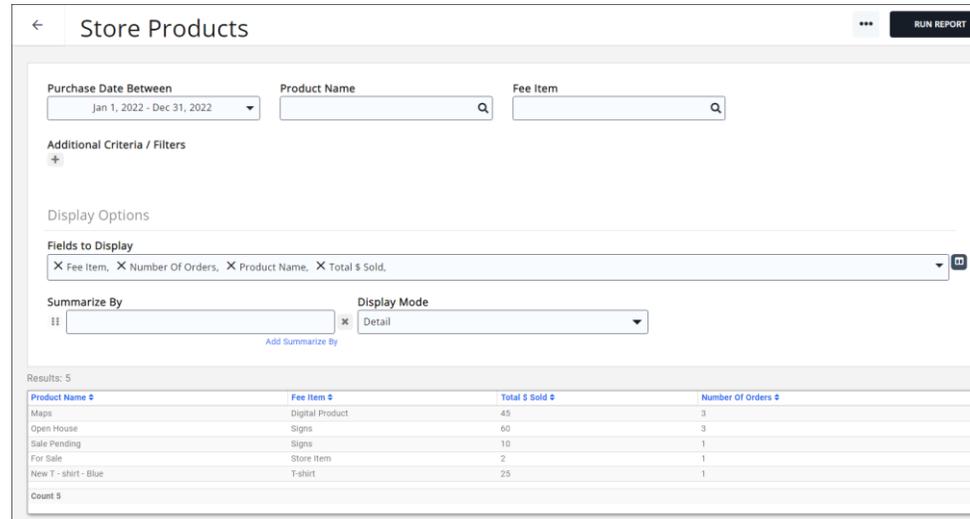
Results: 9

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, the number of orders for each item, and the custom fields.

KB: [Store Products Report](#)



The screenshot shows the 'Store Products' report interface. It includes a 'Purchase Date Between' dropdown set to 'Jan 1, 2022 - Dec 31, 2022', and search fields for 'Product Name' and 'Fee Item'. Below these are 'Additional Criteria / Filters' and 'Display Options' sections. The 'Fields to Display' section shows 'Fee Item', 'Number Of Orders', 'Product Name', and 'Total \$ Sold'. The 'Summarize By' field is set to 'Fee Item' and the 'Display Mode' is set to 'Detail'. The results table shows 5 items with columns for Product Name, Fee Item, Total \$ Sold, and Number Of Orders.

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			

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 \(chat on far right\)](#) »