

GrowthZone Projects/Tasks Initial Setup



Setup Project Types

Setup Task Types

Setup Project Result Types

Setup Project Templates

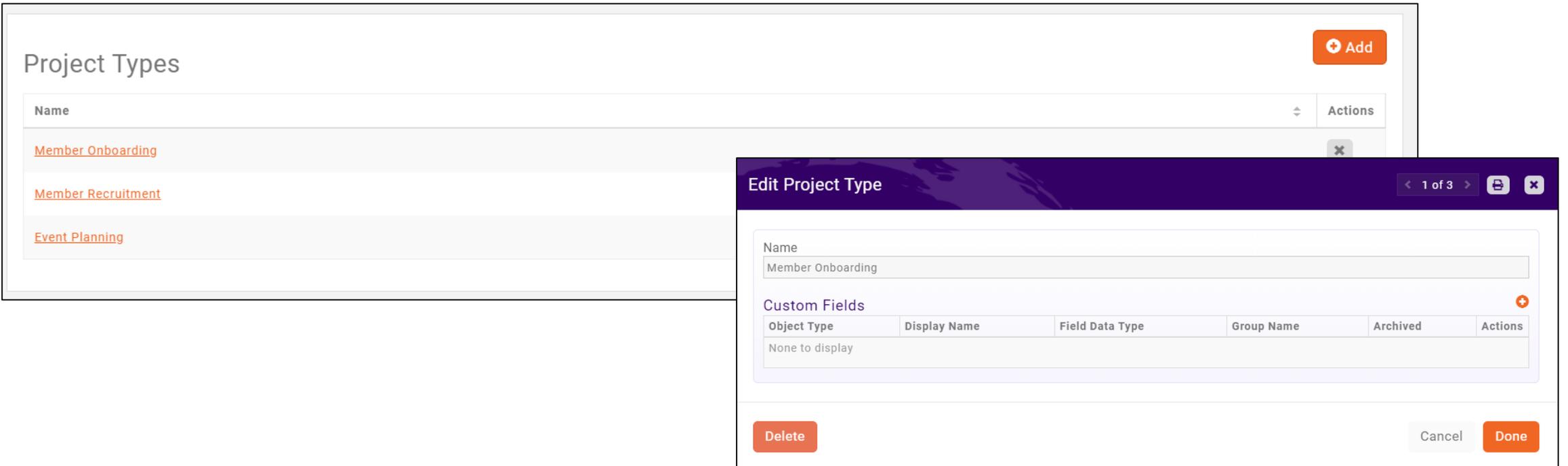
- Create Template
- Add Tasks to Template

The Project Management module will help you to organize and manage projects from beginning to end. The module can be used to manage your member acquisition, member on-boarding, events, and more

If you have projects that are repeatable (such as member on-boarding) you can create a project template to be re-used, saving you time. Additionally, the project management module allows you to create and monitor individual tasks that you may need outside of an actual project

Setup Project Types

Project types allow you to group together projects with similar characteristics. Examples of project types include: Event, Membership, Store Merchandising, etc.



The screenshot displays the 'Project Types' management interface. On the left, a list of project types is shown with columns for 'Name' and 'Actions'. The listed types are 'Member Onboarding', 'Member Recruitment', and 'Event Planning'. An 'Add' button is located in the top right corner of the list. On the right, an 'Edit Project Type' modal is open, showing the 'Name' field set to 'Member Onboarding'. Below the name field is a 'Custom Fields' section with a table that currently shows 'None to display'. The table has columns for 'Object Type', 'Display Name', 'Field Data Type', 'Group Name', 'Archived', and 'Actions'. At the bottom of the modal, there are 'Delete', 'Cancel', and 'Done' buttons.

Name	Actions
Member Onboarding	
Member Recruitment	
Event Planning	

Object Type	Display Name	Field Data Type	Group Name	Archived	Actions
None to display					

Setup Project Task Types

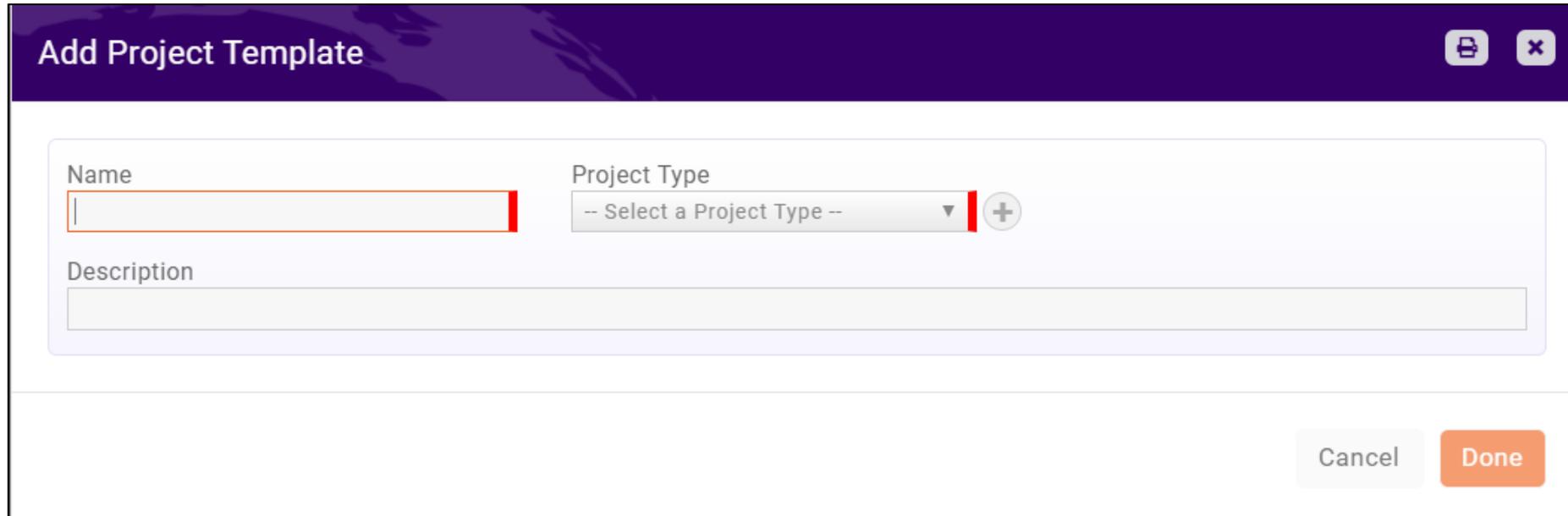
Task Types allow you to identify common tasks that you will use in your projects. The task types are the selectable, and available for filtering and reporting purposes.

WIKI: [Task Types](#)

Task Types				+ Add
Name	Description	Css Color	Is Active	
Pre-Conversion			Yes	
Conversion			Yes	

Setup Project Templates

- Project templates can be created for projects that are repeatable, such as New Member On-boarding, Member Acquisition, Events, etc.

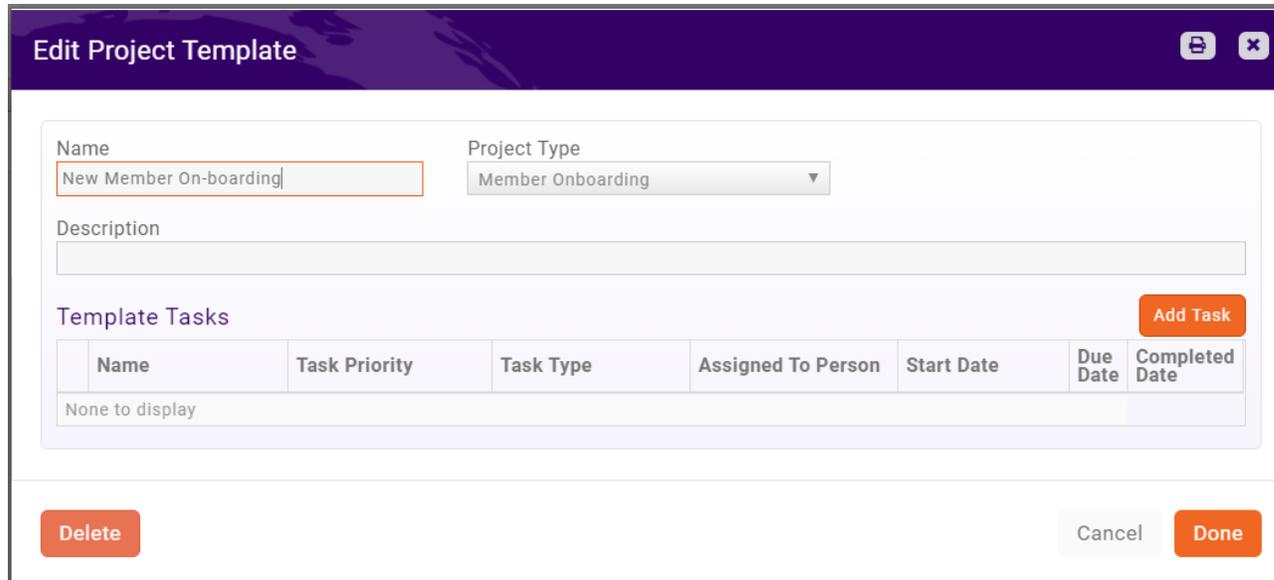


The screenshot shows a dialog box titled "Add Project Template" with a dark purple header. The dialog contains the following fields and controls:

- Name:** A text input field with a red border.
- Project Type:** A dropdown menu with the text "-- Select a Project Type --" and a plus sign icon to its right.
- Description:** A large text area for entering details.
- Buttons:** "Cancel" and "Done" buttons at the bottom right.

Setup Project Templates

- Creating a template is a two step process:
 1. Create the template



Edit Project Template

Name: Project Type:

Description:

Template Tasks Add Task

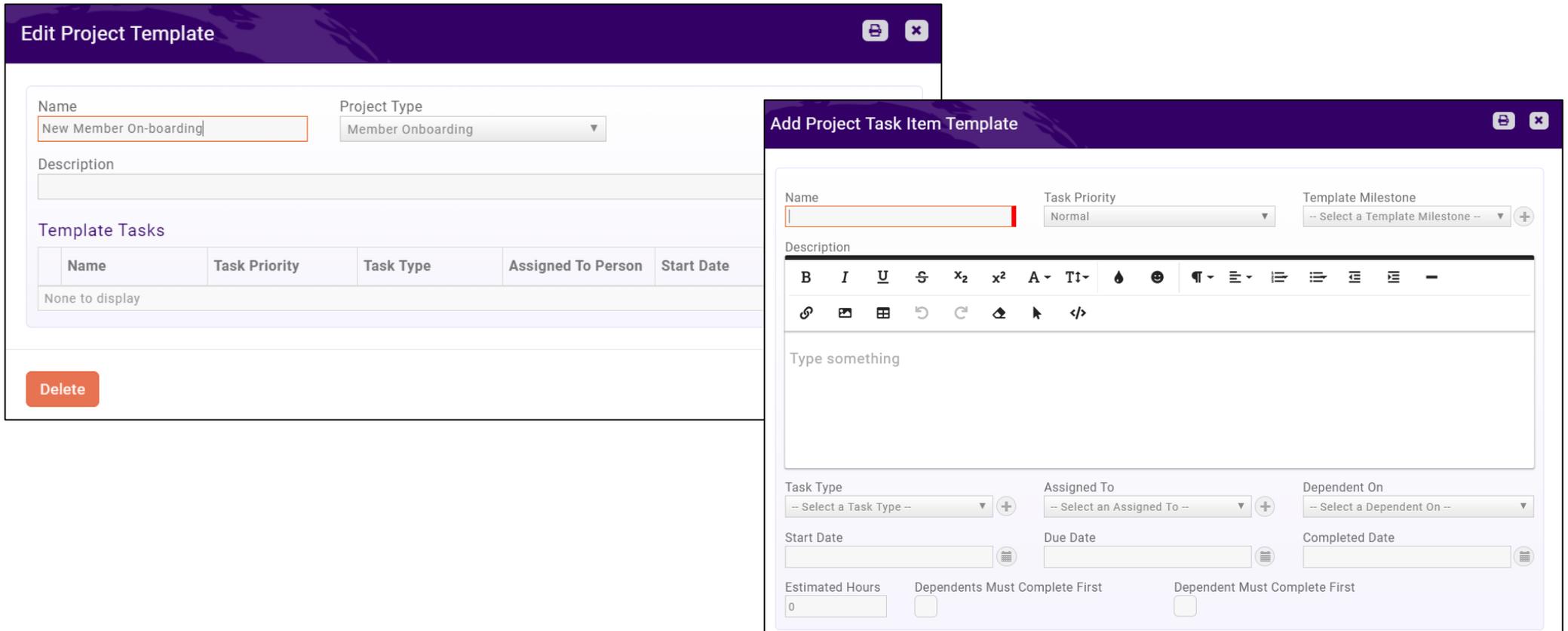
Name	Task Priority	Task Type	Assigned To Person	Start Date	Due Date	Completed Date
None to display						

Delete Cancel Done

WIKI: [Setup Project Templates](#)

Setup Project Templates

2. Add tasks to the template. Adding tasks to a template is optional, however, if your project will contain standard repeatable tasks, you can save time by entering them into the template.



The image shows two overlapping software windows. The background window is titled "Edit Project Template" and contains a form with the following fields: "Name" (text input with "New Member On-boarding"), "Project Type" (dropdown menu with "Member Onboarding"), and "Description" (text area). Below these is a "Template Tasks" section with a table header: "Name", "Task Priority", "Task Type", "Assigned To Person", and "Start Date". The table currently shows "None to display". A "Delete" button is located at the bottom left of this window.

The foreground window is titled "Add Project Task Item Template" and contains a form with the following fields: "Name" (text input), "Task Priority" (dropdown menu with "Normal"), and "Template Milestone" (dropdown menu with "-- Select a Template Milestone --"). Below these is a "Description" text area with a rich text editor toolbar. At the bottom of this window are several dropdown menus: "Task Type" (with "-- Select a Task Type --"), "Assigned To" (with "-- Select an Assigned To --"), "Dependent On" (with "-- Select a Dependent On --"), "Start Date", "Due Date", and "Completed Date". There are also checkboxes for "Estimated Hours" (set to 0), "Dependents Must Complete First", and "Dependent Must Complete First".

Questions?

