5 Benefits of GrowthZone Pay



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- 1. Stored Profiles for Membership Dues
- 2. Stored Profiles in MIC & for Events
- 3. Save Money with Paperless Billing
- 4. Easily process credit cards at events
- 5. Point of Sales within Staff App





1. Stored Profiles for Membership Dues

- Members store credit cards/bank accounts within MIC
 - Sign up for Autopay independently
 - How members setup Autopay
- System automatically charges dues and other recurring fees to those cards/bank accounts
- Paperless billing
 - Ugly truth of paper billing & payment processing
- KB: <u>Autopay & Billing Tab</u>

GREEN VALLEY	Search Q Account Set						
Chamber of Commerce		ectory	Events Re		News Settings		
Account Settings	Autopay And Billin	g					
Personal 🗮						Manage Autopay	
Company 🔳	Membership Fees &	k Dues 😗					
Billing 🚥	Name	Frequency	Next Bill Date	Next Bill Amount	Billing Contact	Payment Profile	
· Payment Profiles	Gold Membership	Annually	Jan 2023	\$600.00	Billing Contact Name		
 Make a Payment 	Enhanced Listing	Annually	15 Sep 2023	\$35.00	Billing Contact Name	Visa:*******4242-01/2032	
Autopay & Billing						Add/Manage Payment Profiles	
 Transaction History 							
 Shopping Cart 							



Stored Profiles – How It Works

- Enable Autopay under Billing
 Options & Settings
 - Set <u>date</u> to charge cards/bank accounts
- Promote ability to store cards to members
 - <u>Template</u> provided
- System creates invoice and charges payment profile on charge date
- KB: <u>AutoPay of ePayment</u>
 <u>Profiles</u>

Dear Mr. Smith,

Setup automatic payments! Never forget another membership payment! Save on stamps, checks, and late fees. Please follow these simple steps to get started.

- 1. *Login to the Member Information Center at http://kalamzooareachamber/login?dest=paybills
- 2. Select the invoice you want to pay > continue > checkout
- 3. Enter payment information and select "Turn on Autopay" > checkout
- 4. Check the box to accept the terms and set up automatic payments > submit > continue

That's it! We will let you know when the setup is complete and provide confirmation of the automatic payment details. For questions or concerns, please contact us at (555) 555-5555 or info@mailinator.com.

Thank you! **Kalamazoo Area Chamber** 1903 W. Michigan Ave. Kalamazoo, MI 49008 555-555-5555 kalamazoochamberinfo@mailinator.com

*Forgot your login? Go to Forgot Password Link to reset your password. Or create your login account for the first time at this registration page: https://kalamzooareachamber/CreateAccount



Is Storing Cards in GrowthZone Pay Safe?

- <u>Stripe</u> credit card processor exceeds most stringent security standards
 - SSL Protection
 - PCI Compliant
 - Encrypted
- Credit card information *not* stored in CM/MZ database
- <u>Learn More About Security at</u> <u>Stripe</u>







2. Stored Profile in MIC & for Events

- Members can store Payment Profiles for quick & easy payments
 - Credit Cards
 - Bank Accounts
- Members manage profiles
 <u>independently</u> within MIC
- KB: <u>Member Options for</u> <u>Storing Payment Profiles</u>

Carroll Larsen						\$50.00	
	Online Credit Card Paym	ent. VISA Maseran	AMER DISCOVER				
	Save	ed Card \bigcirc N	ew Card				
	*Saved Cards: CSC: ?						
	Visa:******4242-01/2025		~				
	First Name:	Last Name:					
	Carroll	Larsen					
	Company Name:						
	Carroll Boutique						
	Street:						
	City:	State	e: Postal (Code:			
	Country:						
	United States 🗸 🗸						
	Phone:	Email:					
< Back						™ Checkout >	





3. Save Money with Paperless Billing

- Eliminate costs of <u>paper</u> <u>billing</u>
 - Hidden costs of paper invoices
 and payments
 - Staff use time more efficiently
- Member peace of mind
 - Autopay more secure than cash or checks
 - PCI-compliant payment security
 - Data encrypted and protected





Best Practices for Paperless Billing

- Advise members of the switch in advance
 - Use <u>email template</u>
- Ensure member's contact email is accurate
- Maintain good <u>sender reputation</u>
 - Check Email Status Summary Report
- Provide ways to pay online
 - Link on invoice
 - Via <u>MIC</u>





4. Easily Process Credit Cards at Events

- Provide more payment options for members
 - Make it easy to pay
- Use <u>mobile card reader</u> for faster, more efficient customer experience
- Payment receipts sent automatically
- Database updated automatically
- KB: <u>Manage Events with StaffApp</u>
- Video: <u>Paying Event Registrations with</u> <u>Credit Cards</u>



Chambermaster

Mobile Card Readers & the StaffApp

- Quick checkout
- Smooth, efficient customer experience
- Use with Android and Apple devices
- <u>Recommended</u> mobile card reader
- KB: Point of Sale in StaffApp
- KB: <u>Mobile Card Readers</u>





5. Point of Sale Module with StaffApp

- <u>Provides</u> full feature check-out solution
 - Mobile card reader compatible
- Sell additional items at tournament
 - Mulligans
 - Drink tickets
 - Contest/game entry
 - Raffle tickets
 - Tees
- Automatic transactions created on member's account
 - Sell items to non-members, too!

2:58		💐 🕾 .ıll 77% 🖥
$\equiv \phi$		Dashboard
Memberships		
57 0 Active Courtesy		2 11 Member In-Active
Membership Activity		
😟 New Members		
1	1	8
This Month	Last Month	YTD
😟 Dropped Mem	bers	
0	0	0
This Month	Last Month	YTD
Events		
Event Activity		
3	12	
This Week	This Month	\$14,189.40
Tasks		YTD Revenue
Hot Deals		0
MarketSpace Ite	ems	1 >
<	0	111



StaffApp Overview

- Companion product to software
 - <u>Check-in</u> event attendees
 - Create billing transactions
 - Add new members to database
 - <u>Approve</u> membership applications
 - Check account balance and recurring fees
 - Send <u>eReferrals</u>
 - Communicate with members
 - <u>Email</u>
 - Call
- KB: <u>StaffApp Overview</u>





- Give AutoPay members option of <u>annual or</u> <u>monthly</u> billing
 - Reduces burden of large annual bill
 - Helps retain members
- KB: <u>Enable Switching</u> <u>from Annual to Monthly</u> <u>Payments</u>







• Automated deposits allow to easily match deposits made to bank account to transactions in your ChamberMaster software

Payments deposited to Deposit Account on 3/26/2020										
Date	<u>Type</u>	<u>Ref #</u>	Sale #	Method	Member Name	Bill To	Details	Amount		
3/25/2020	PMT	<u>876</u>		CreditCard	The Florist Shop	Linda Stanch	100.00 May Golf Tournament: In	100.00		
3/25/2020	PMT	<u>765 CC</u>		CreditCard	The Florist Shop	Linda Stanch	500.00 New Member Dues	500.00		
3/24/2020	RCPT	<u>VISA *4242</u>	<u>194</u>	CreditCard	Non-Member Transactions	Cheri Petterson	50.00 Gift Card Extravaganza!!! 0.00 Gift Card Extravaganza!!!	50.00		
3/24/2020	RCPT	<u>VISA *4242</u>	<u>193</u>	CreditCard	Non-Member Transactions	Carol Bennett	25.00 Gift Card Extravaganza!!! 0.00 Gift Card Extravaganza!!!	25.00		
3/24/2020	RCPT	<u>VISA *4242</u>	<u>192</u>	CreditCard	Non-Member Transactions	Tanyo May	50.00 Gift Card Options: Micki 0.00 Gift Card Options: Gift C	50.00		
3/23/2020	PMT	VISA *4242		CreditCard	Maysies Floral	Giana Mays	100.00 May Golf Tournament: In	100.00		
3/23/2020	PMT	VISA *4242		CreditCard	Maysies Floral	Lara Oson	100.00 May Golf Tournament: In	100.00		
3/23/2020	PMT	<u>VISA *4242</u>		CreditCard	Maysies Floral	Tanay Mays	100.00 May Golf Tournament: In	100.00		
3/23/2020	PMT	<u>VISA *4242</u>		CreditCard	Non-Member Transactions	John Jones	200.00 May Golf Tournament: In	200.00		
3/19/2020	RCPT	<u>VISA *4242</u>	<u>191</u>	CreditCard	Non-Member Transactions	Lily Frank	50.00 Gift Card Options: Micki 25.00 Gift Card Options: Micki 0.00 Gift Card Options: Gift C	75.00		



- Refunds, dispute management and reconciliations handled <u>directly</u> in ChamberMaster/MemberZone database with
- KB: <u>Manage Refunds</u>
- KB: <u>Disputed Charges</u>

	Features and Settings All dates/times listed below are based on the Central time zone server (GMT-06:00).										
	Payment Processing Transactions										
Member Name	Item	Txn ID	Billing Txn	CM Ref ID	СС Туре	CC #	Amount	Processing Fee	Date Charged	Result	Action
	Invoice	ch_2iviiviEzmOaikbGSV110UQmpSW5 Disputed: under_review	MasterCard *		MasterCard		\$150.00	\$4.94	1/3/2023 12:14PM	Success	Refund
	Backoffice Payment	ch_2MmfHEOaiKbG3VYI0z6P0oWd	MASTERCARD*		MASTERCARD		\$310.00	\$9.72	3/17/2023 10:33AM	Success	Refund



- Reconciliation reports available in ChamberMaster database
- KB: <u>Payment Processing Report</u>
- KB: <u>Record GrowthZone Pay Transaction Fees with QuickBooks</u>

Billing Repo	orts			
Payment Proce Filter Options	essing Report			Select Another Report
Member: Select a Men	nber			
From:	9/1/2018	more	Only show successful transactions	
To:	10/8/2018		Show item details	
			Show unresolved disputes	
Unresolv	ved disputed transactions	regardless of date		
		Refresh Report	Print Report Download Report Reset Options	



Training Resources





Expanded Training Offerings





Ready to implement GrowthZone Pay? Contact our Account Management Team accountmanagement@growthzone.com

