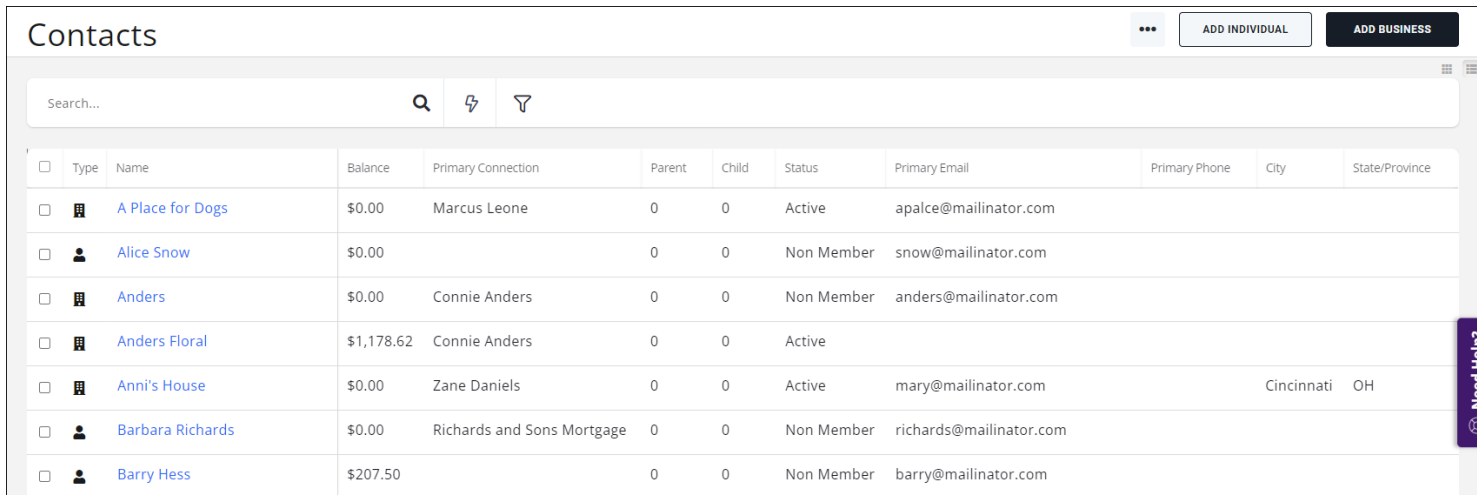


Managing your Contacts

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



<input type="checkbox"/>	Type	Name	Balance	Primary Connection	Parent	Child	Status	Primary Email	Primary Phone	City	State/Province
<input type="checkbox"/>	🏢	A Place for Dogs	\$0.00	Marcus Leone	0	0	Active	apalce@mailinator.com			
<input type="checkbox"/>	👤	Alice Snow	\$0.00		0	0	Non Member	snow@mailinator.com			
<input type="checkbox"/>	🏢	Anders	\$0.00	Connie Anders	0	0	Non Member	anders@mailinator.com			
<input type="checkbox"/>	🏢	Anders Floral	\$1,178.62	Connie Anders	0	0	Active				
<input type="checkbox"/>	🏢	Anni's House	\$0.00	Zane Daniels	0	0	Active	mary@mailinator.com		Cincinnati	OH
<input type="checkbox"/>	👤	Barbara Richards	\$0.00	Richards and Sons Mortgage	0	0	Non Member	richards@mailinator.com			
<input type="checkbox"/>	👤	Barry Hess	\$207.50		0	0	Non Member	barry@mailinator.com			

Initial Setup – System Terminology

Dependent on the edition of software you are using there may be different terminology for organizations and individuals.

- KB: [System Terminology](#)

Terminology Settings				
Term	Description	Term Omitted	Your Custom Term	Plural Form
Account Number	How you refer to a Contact's account number	No	COID/PIN	COIDs/PINs
Benefit Credit	Benefit Credit	No		
Business	A business, organization, company or other entity	No		
Chapter	A local branch	No		
Contact	A record for a business, individual or family	No		
Continuing Education	How you refer to certifications/continuing education.	No		
Donation/Contribution	A monetary gift or contribution	No		

Initial Setup – Account Numbers

Do you wish to automatically assign account numbers to your contacts?

Account Numbers and Membership Numbers SAVE

Contact Account Numbers

Automatically Assign Account Numbers To Individuals Automatically Assign Account Numbers To Organizations

Next Account Number Assigned
56

Contact Assignment Trigger Type
When created Enforce Account Number Uniqueness

Membership Numbers

Automatically Assign Membership Numbers Enforce Membership Number Uniqueness When to assign
When created

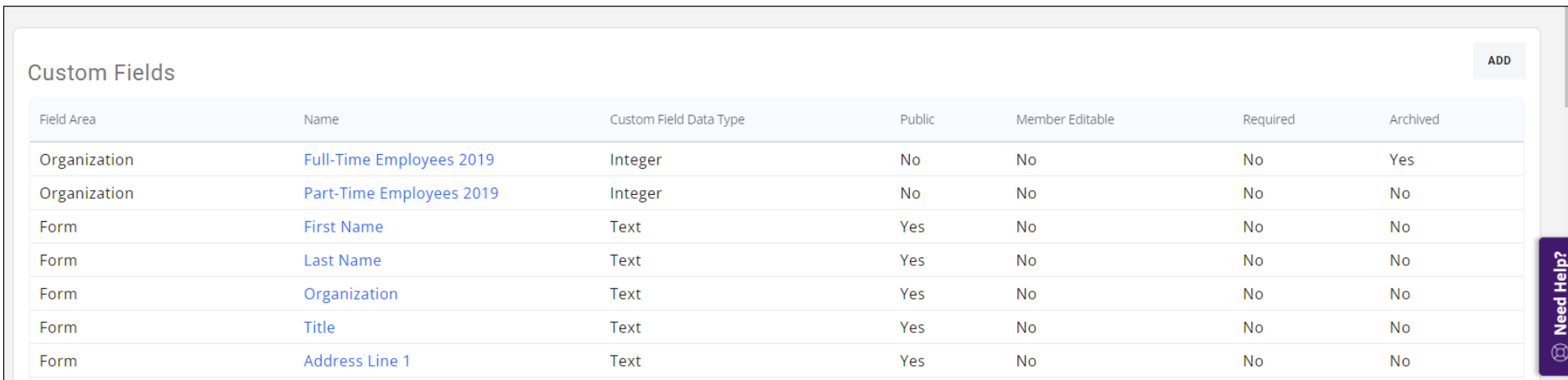
Next Membership Number Assigned
165763

[Need Help?](#)

- NOTE: Realtor Edition you can also manage and assign NRDS ID's via the database. Your choices will be configured during installation of the software

Initial Setup – 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. KB: [Contact Custom Fields](#)







Field Area	Name	Custom Field Data Type	Public	Member Editable	Required	Archived
Organization	Full-Time Employees 2019	Integer	No	No	No	Yes
Organization	Part-Time Employees 2019	Integer	No	No	No	No
Form	First Name	Text	Yes	No	No	No
Form	Last Name	Text	Yes	No	No	No
Form	Organization	Text	Yes	No	No	No
Form	Title	Text	Yes	No	No	No
Form	Address Line 1	Text	Yes	No	No	No

Initial Setup - Categories

Categorizing your contacts is a way to:

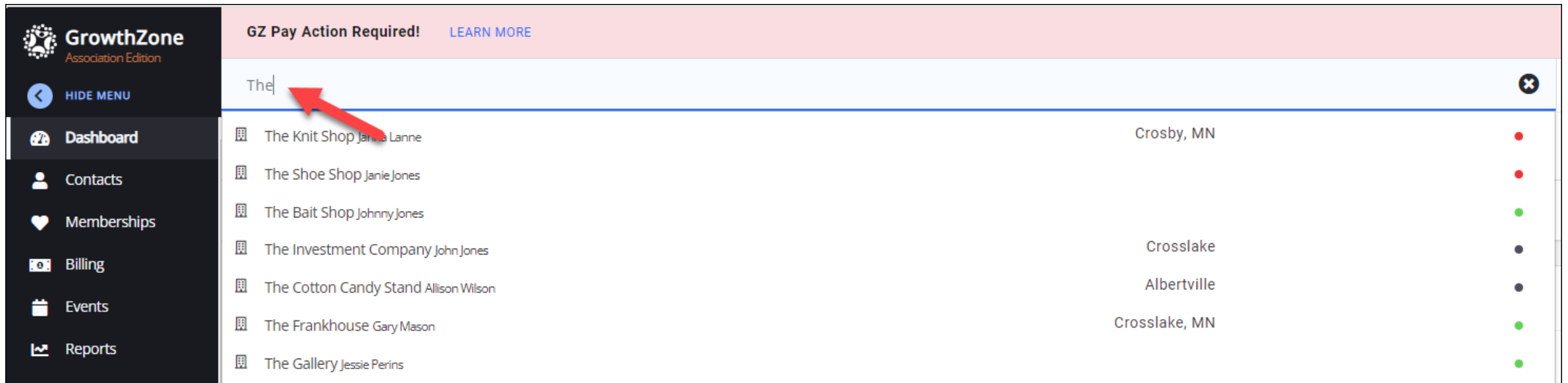
- Define where your contacts will be displayed in your Member Directory.
- Track additional information about the contact, with high visibility on the Profile tab. For Example: Languages Spoken
- KB: [Create Category Lists](#)

Category Lists					ADD
Category Type	Name	Description	Fee Items	Actions	
Business contact	Ownership		4	 	
Business contact	Languages Spoken		4	 	

Searching for Contacts

Global Search

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

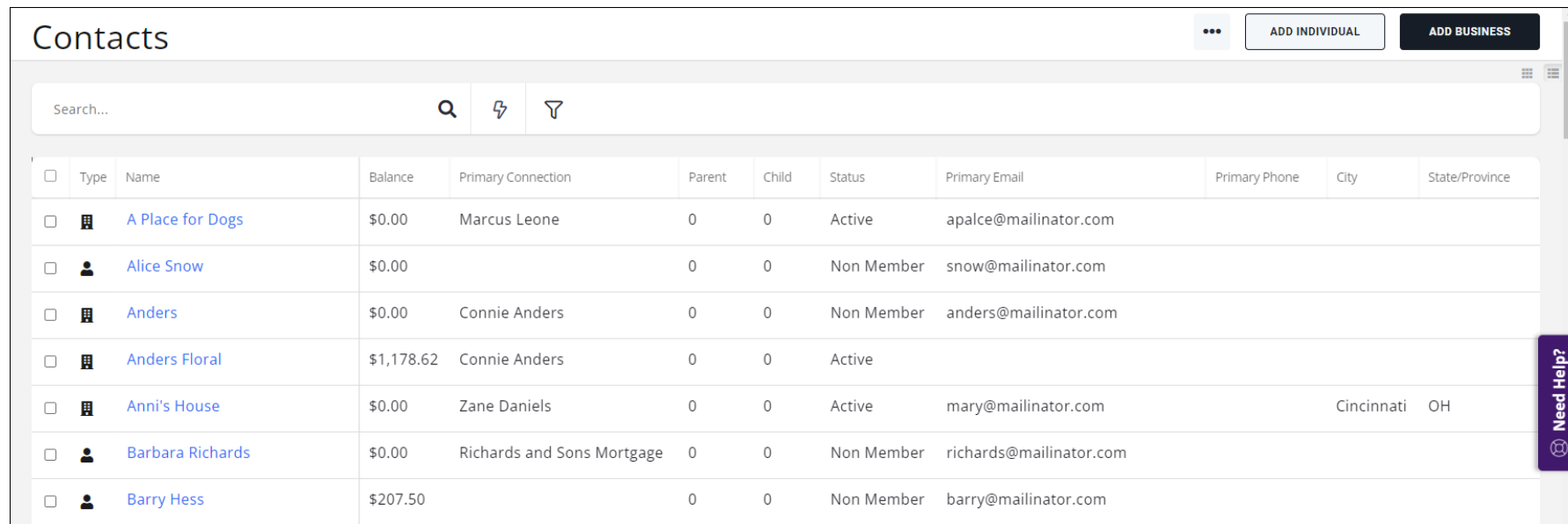


The screenshot displays the GrowthZone Association Edition interface. A search bar at the top contains the text 'The', with a red arrow pointing to it. Below the search bar, a dropdown list shows search results for contacts. The results are as follows:

Contact Name	Location	Status
The Knit Shop Janie Lanne	Crosby, MN	Red dot
The Shoe Shop Janie Jones		Red dot
The Bait Shop Johnny Jones		Green dot
The Investment Company John Jones	Crosslake	Grey dot
The Cotton Candy Stand Allison Wilson	Albertville	Grey dot
The Frankhouse Gary Mason	Crosslake, MN	Green dot
The Gallery Jessie Perins		Green dot

Searching for Contacts

Searching within the **Contacts** module allows for additional filtering options



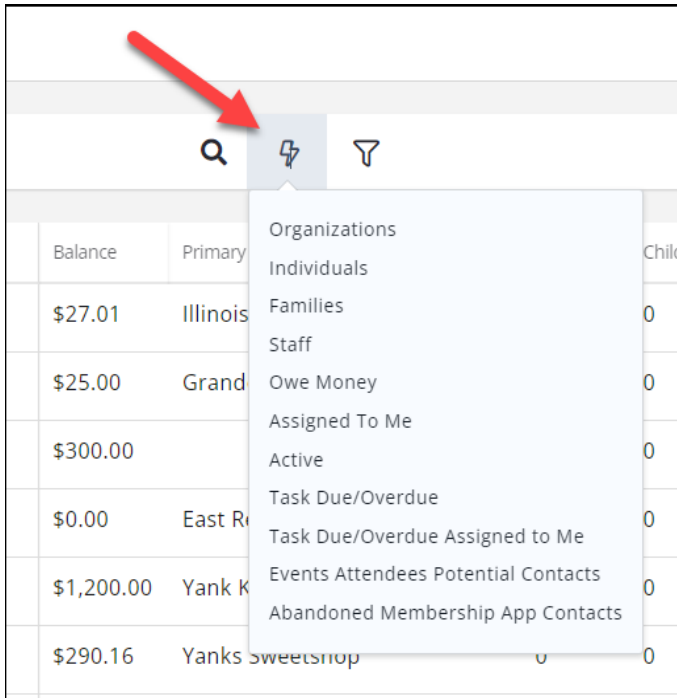
The screenshot displays the 'Contacts' module interface. At the top, there are buttons for 'ADD INDIVIDUAL' and 'ADD BUSINESS'. Below these is a search bar with a search icon, a refresh icon, and a filter icon. The main area contains a table with the following data:

<input type="checkbox"/>	Type	Name	Balance	Primary Connection	Parent	Child	Status	Primary Email	Primary Phone	City	State/Province
<input type="checkbox"/>	🏠	A Place for Dogs	\$0.00	Marcus Leone	0	0	Active	apalce@mailinator.com			
<input type="checkbox"/>	👤	Alice Snow	\$0.00		0	0	Non Member	snow@mailinator.com			
<input type="checkbox"/>	🏠	Anders	\$0.00	Connie Anders	0	0	Non Member	anders@mailinator.com			
<input type="checkbox"/>	🏠	Anders Floral	\$1,178.62	Connie Anders	0	0	Active				
<input type="checkbox"/>	🏠	Anni's House	\$0.00	Zane Daniels	0	0	Active	mary@mailinator.com		Cincinnati	OH
<input type="checkbox"/>	👤	Barbara Richards	\$0.00	Richards and Sons Mortgage	0	0	Non Member	richards@mailinator.com			
<input type="checkbox"/>	👤	Barry Hess	\$207.50		0	0	Non Member	barry@mailinator.com			

Searching for Contacts

KB: [Search for Contacts](#)

Show Only... drop down list



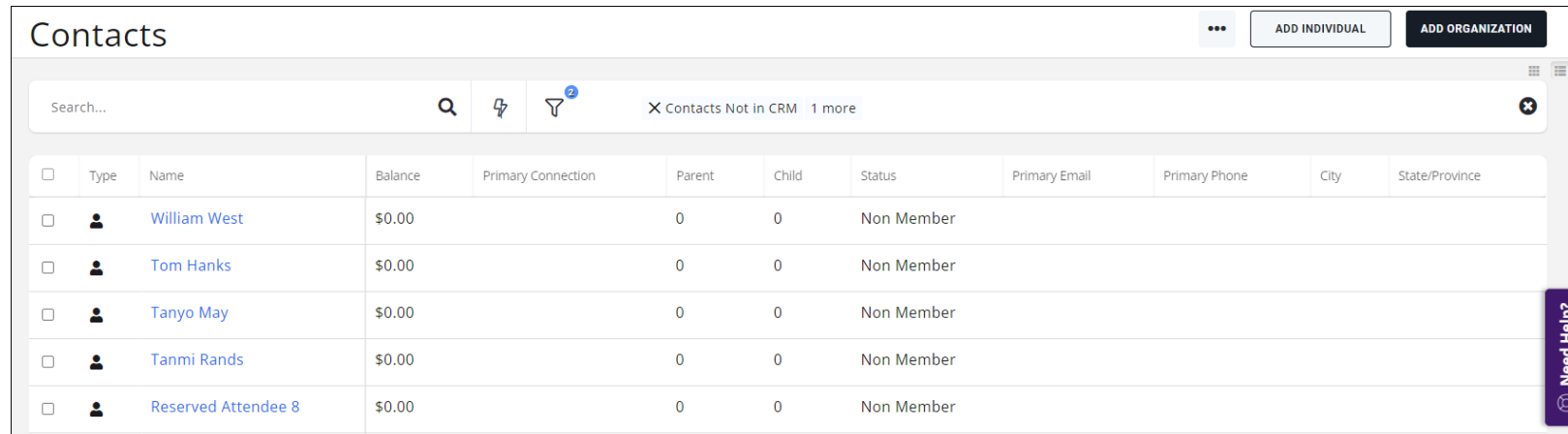
Customize Filter button

A screenshot of the 'Contacts - Customize Results' dialog box. It features several sections for filtering contacts:

- General:** Contact Type, Membership Type, Level, Status (all dropdown menus).
- Textual Filters / Location:** Name Contains, Email Contains, Phone Contains, Website Contains (all text input fields).
- Textual Filters / Location:** Title Contains, Account Number, Primary City (text input field with search icon), Country (dropdown menu).
- Primary State/Province:** Primary State/Province (dropdown menu).
- Connected To:** Assigned To, List/Committee, Category (all dropdown menus).

Find Event Attendees Potential Contacts

- Event registrants who are not already contacts in your database can be found within the Contacts module and easily be converted to a contact. KB: [View Contacts - Event Attendees Potential Contacts](#)



The screenshot displays the 'Contacts' module interface. At the top, there are buttons for 'ADD INDIVIDUAL' and 'ADD ORGANIZATION'. Below these is a search bar with a search icon, a refresh icon, and a filter icon with a '2' notification. A filter is applied: 'X Contacts Not in CRM 1 more'. The main area contains a table with the following columns: Type, Name, Balance, Primary Connection, Parent, Child, Status, Primary Email, Primary Phone, City, and State/Province. The table lists five contacts, all with a balance of \$0.00 and a status of 'Non Member'. A 'Need Help?' button is visible on the right side of the table.

<input type="checkbox"/>	Type	Name	Balance	Primary Connection	Parent	Child	Status	Primary Email	Primary Phone	City	State/Province
<input type="checkbox"/>	Person	William West	\$0.00		0	0	Non Member				
<input type="checkbox"/>	Person	Tom Hanks	\$0.00		0	0	Non Member				
<input type="checkbox"/>	Person	Tanyo May	\$0.00		0	0	Non Member				
<input type="checkbox"/>	Person	Tanmi Rands	\$0.00		0	0	Non Member				
<input type="checkbox"/>	Person	Reserved Attendee 8	\$0.00		0	0	Non Member				

Add Contact

Quick Actions

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

Add Organization 🖨️ ✕

General

Name*

Phone, email, or website Type Note ⊖

+

Addresses

Address Address 2 City State/Prov. Postal Code ⊖

Country Type Usage Note ⊖

+

Individuals (Optional)

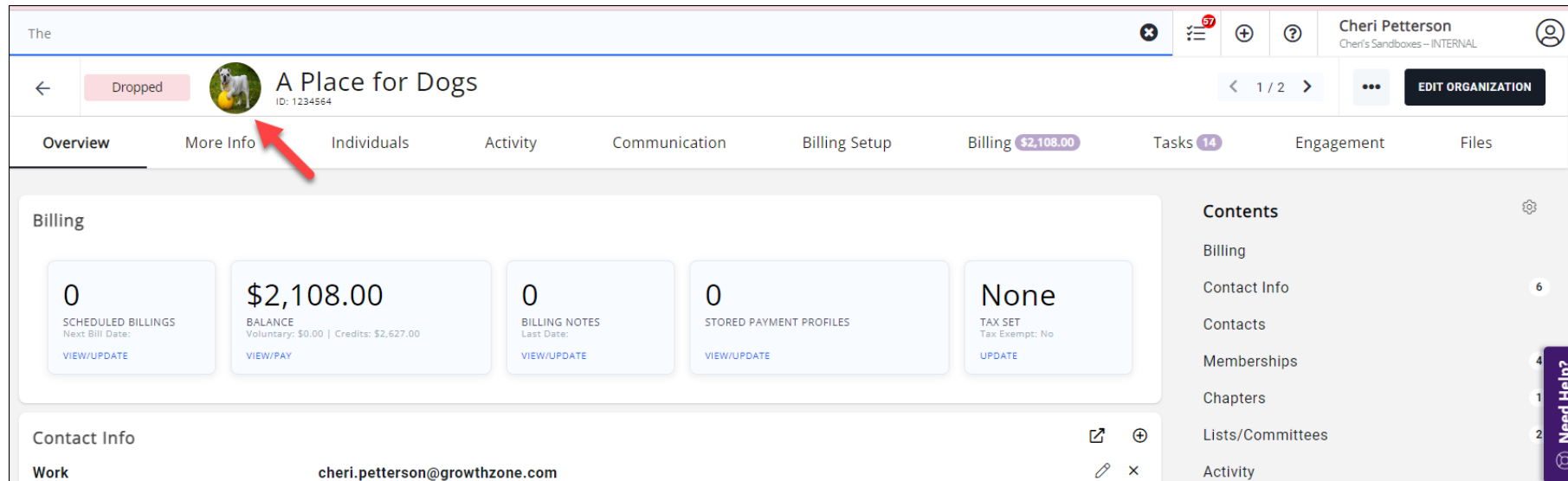
First Name Last Name Title ⊖

+

Cancel Done

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
- KB: [Add/Update Logo](#)

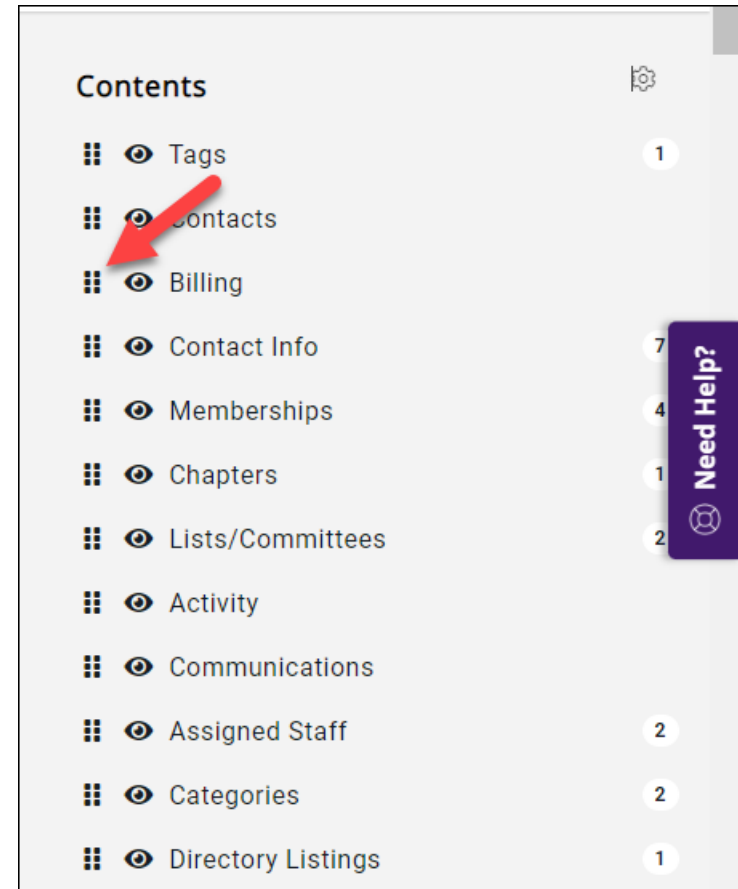


The screenshot displays a user interface for a contact profile. At the top, the user is identified as 'Cheri Petterson' with the role 'Cheri's Sandboxes - INTERNAL'. The contact profile is for 'A Place for Dogs' (ID: 1234564), which is marked as 'Dropped'. A red arrow points to the 'More Info' tab in the navigation menu. The 'Billing' section shows a balance of \$2,108.00 and other financial details. The 'Contact Info' section shows the email address 'cheri.petterson@growthzone.com'. A 'Need Help?' button is visible in the bottom right corner.

Category	Value	Details	Action
SCHEDULED BILLINGS	0	Next Bill Date:	VIEW/UPDATE
BALANCE	\$2,108.00	Voluntary: \$0.00 Credits: \$2,627.00	VIEW/PAY
BILLING NOTES	0	Last Date:	VIEW/UPDATE
STORED PAYMENT PROFILES	0		VIEW/UPDATE
TAX SET	None	Tax Exempt: No	UPDATE

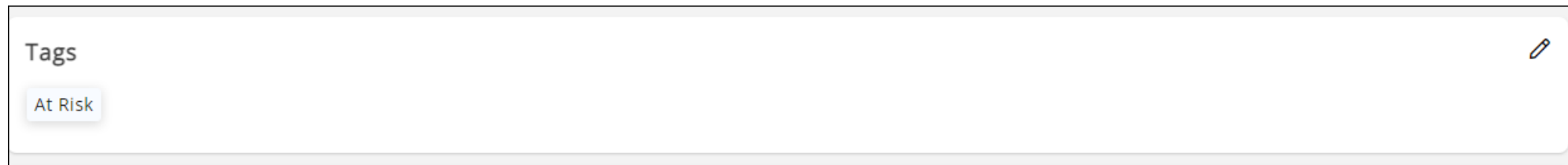
Contact Overview Tab

The Contact overview tab is where you will update phone numbers, email addresses, etc. The display can be changed to best suit your needs

















Contact Tags

- Tags are for “internal use” only and may be used to segment records into groups. For example: At Risk, Hot Prospect, Defaulted.
- 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
- KB: [Add Tags to an Organization/Individual](#)



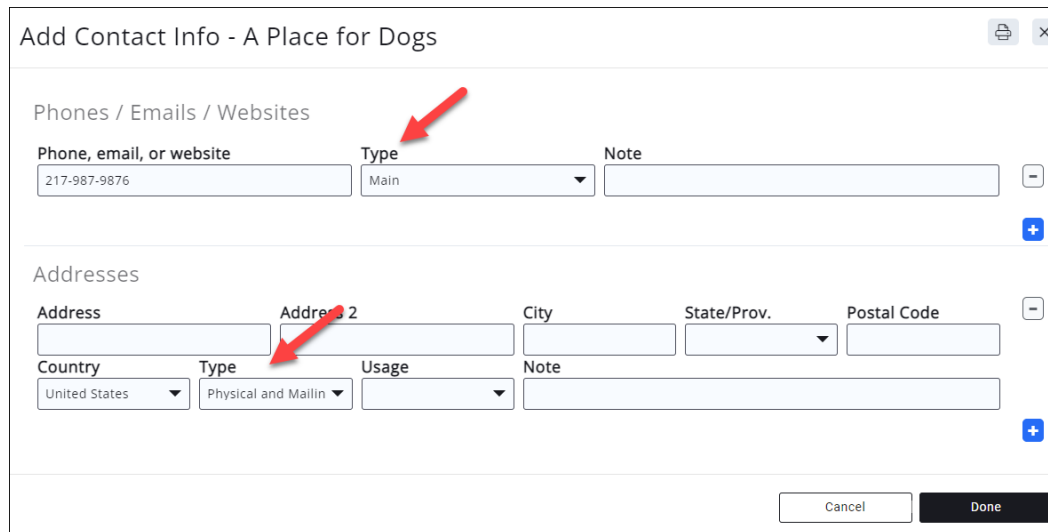
Default Contact Information

- 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

Contact Info			
Work	cheri.petterson@growthzone.com		
Main	(218) 786-0987		
Mailing	24400 Smiley Road Nisswa MN 56468 United States		
Social site	https://www.facebook.com/dogs/		
Main	800-123-3456		
Social site	https://twitter.com/degs		

Default Contact Information

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



The screenshot shows a web form titled "Add Contact Info - A Place for Dogs". It is divided into two main sections: "Phones / Emails / Websites" and "Addresses".


















Phones / Emails / Websites: This section contains a table with three columns: "Phone, email, or website", "Type", and "Note". The first row has the value "217-987-9876" in the first column and "Main" in the second column. A red arrow points to the "Type" dropdown menu.

Addresses: This section contains a table with five columns: "Address", "Address 2", "City", "State/Prov.", and "Postal Code". Below these columns are three rows of input fields. The first row has "United States" in the "Country" dropdown, "Physical and Mallin" in the "Type" dropdown, and an empty "Usage" dropdown. A red arrow points to the "Type" dropdown menu.

At the bottom of the form, there are "Cancel" and "Done" buttons.






Contact Profile

- The Contact Info will also provide indication of the validity of an email and how the email should be used
- KB: [Manage Invalid Email](#)
- KB: [Change the Restrictions Set On An Email Address](#)

Contact Info		 
Work	cheri.petterson@growthzone.com (Only Transactional Emails)	 
Main	(218) 786-0987	 
Mailing	24400 Smiley Road Nisswa MN 56468 United States	 
Social site	https://www.facebook.com/dogs/	 
Work	 randyg@mailinator	 
Main	800-123-3456	 
Social site	https://twitter.com/degs	 

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.
- KB: [Link an Individual to additional Business](#)

Offices 					
Name	Title	Access Level	Location	NRDS Id	
West Marsh Realtors		User - Guest	Crosby, MN	831010056	 
The Lakes Realty		User - Standard		831010025	 

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 will also be reflected and you only need one record for that individual

Associate with Organization

Select Organization

Organization *

Role

Title

Role Start Date

End Role (Optional)

<input type="checkbox"/>	Organization ↓	Title ↓	End Date ↓
<input type="checkbox"/>	A Place for Dogs		11/18/2022
<input type="checkbox"/>	Test Business		11/18/2022

Contact History

- Information on your contacts movement from one contact to another can be viewed in the Contact History
- KB: [Contact History](#)

Contact Roles Print Close

Current And Past Associations


Organization	Role	Title	Start Date	End Date
A Place for Dogs	User- None		10/5/2021	
The Knit Shop	User - Standard		12/11/2020	10/5/2021

Close

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
- KB: [Assign Staff](#)

Assigned Staff ⊕		
Name	Relationship	
Shelly Satre	Sales	 

Assign Categories to Contacts

On the Contact Profile tab, you will be able to view the Category Lists and the Categories to which a contact has been assigned.





KB: [Manage Contact Category Assignment](#)



Categories +		
Category Type	Name	
Business Category	Pets & Veterinary; Dog Boarding	
Ownership	Women Owned	

Parent/Child Relationships

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




KB: [Parent/Child Relationships](#)

Child Organizations			
Organization	City	Type	
Another Place for Dogs	Deerwood	Branch	 
Deerwood Animal Shelter	Deerwood	Branch	 

Parent Organizations			
Organization	City	Type	
The Treehouse	Crosby	Parent	 

Custom Fields

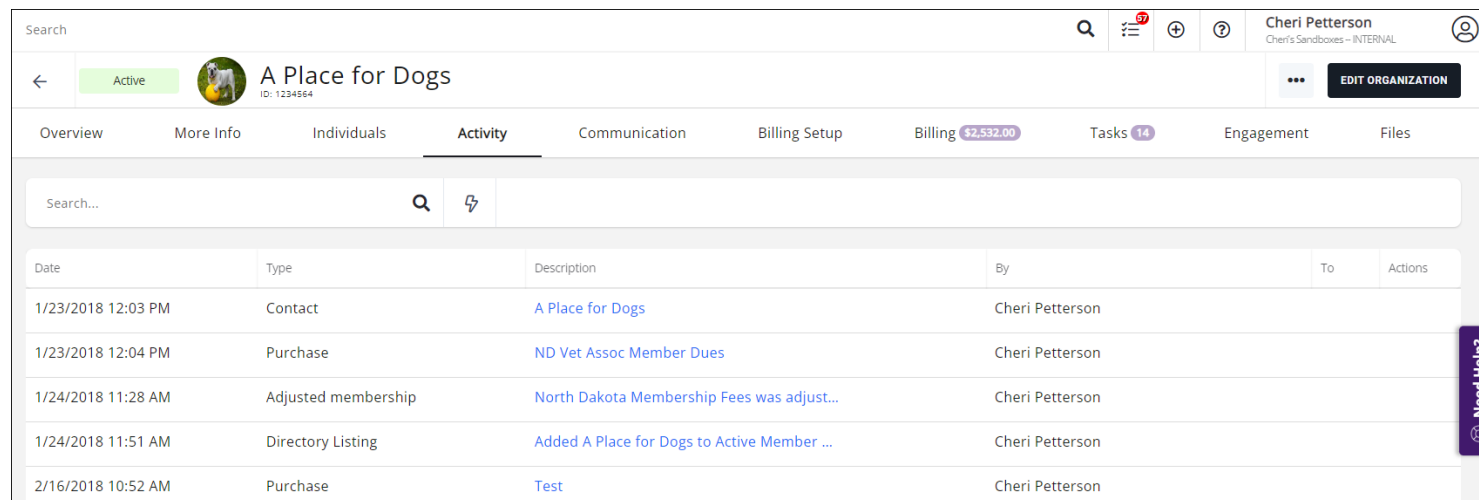
Custom fields can be updated on the contacts' More Info tab

Business Info	
Ownership	
Annual Revenue (Training)	
<hr/>	
Employment	
Number of Employees	
Number of Employees 2019	234
Part-Time Employees 2019	
Number of Employees 2020	190
<hr/>	
Training Section	
Ownership	
<hr/>	
Miscellaneous	
Industry	
Volunteer	

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.

KB: [View Contact Activity](#)

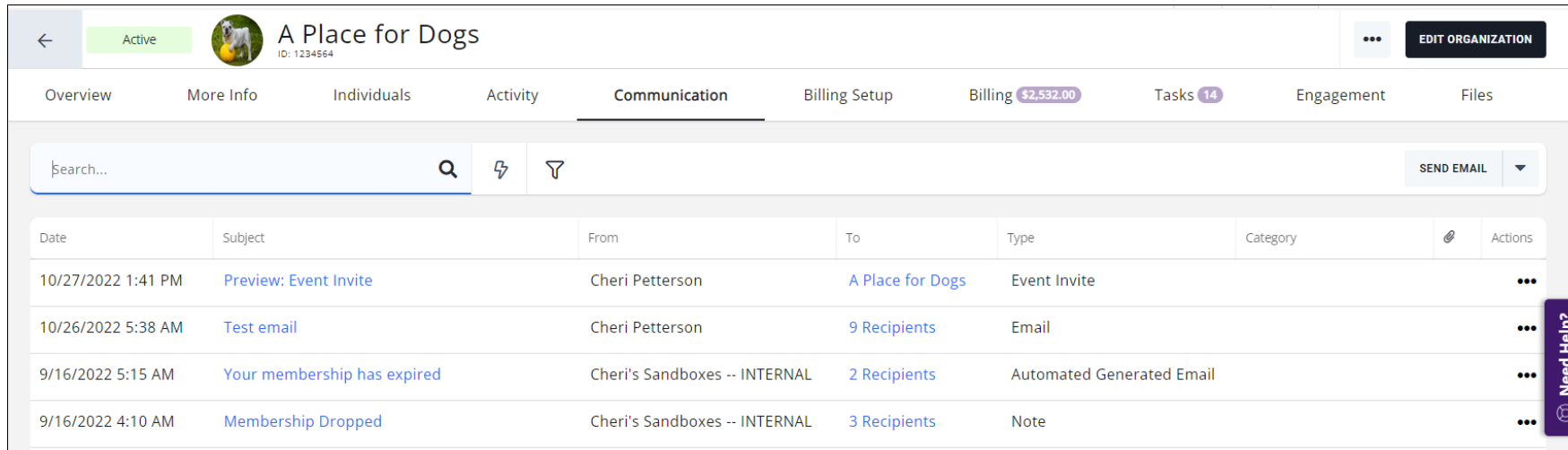


The screenshot displays the 'Activity' tab for the contact 'A Place for Dogs' (ID: 1234564). The interface includes a search bar, navigation tabs (Overview, More Info, Individuals, Activity, Communication, Billing Setup, Billing, Tasks, Engagement, Files), and a table of activity records. The 'Billing' tab shows a balance of \$2,532.00, and the 'Tasks' tab shows 14 tasks. A 'Need Help?' button is visible on the right side of the table.

Date	Type	Description	By	To	Actions
1/23/2018 12:03 PM	Contact	A Place for Dogs	Cheri Petterson		
1/23/2018 12:04 PM	Purchase	ND Vet Assoc Member Dues	Cheri Petterson		
1/24/2018 11:28 AM	Adjusted membership	North Dakota Membership Fees was adjust...	Cheri Petterson		
1/24/2018 11:51 AM	Directory Listing	Added A Place for Dogs to Active Member ...	Cheri Petterson		
2/16/2018 10:52 AM	Purchase	Test	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	Type	Category	Actions
10/27/2022 1:41 PM	Preview: Event Invite	Cheri Petterson	A Place for Dogs	Event Invite		⋮
10/26/2022 5:38 AM	Test email	Cheri Petterson	9 Recipients	Email		⋮
9/16/2022 5:15 AM	Your membership has expired	Cheri's Sandboxes -- INTERNAL	2 Recipients	Automated Generated Email		⋮
9/16/2022 4:10 AM	Membership Dropped	Cheri's Sandboxes -- INTERNAL	3 Recipients	Note		⋮

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.
- KB: [Merge Contacts](#)

Add Merge Organization

Destination*
Another Place for Dogs

Tax Set

Name	Choose Data Source	Current Contact	Destination
	Use destination		Minnesota

Fields to Merge

Name	Choose Data Source	Current Contact	Destination
Contact Name	Use destination	A Place for Dogs	Another Place for Dogs

Cancel Done

Questions?