Managing your Contacts

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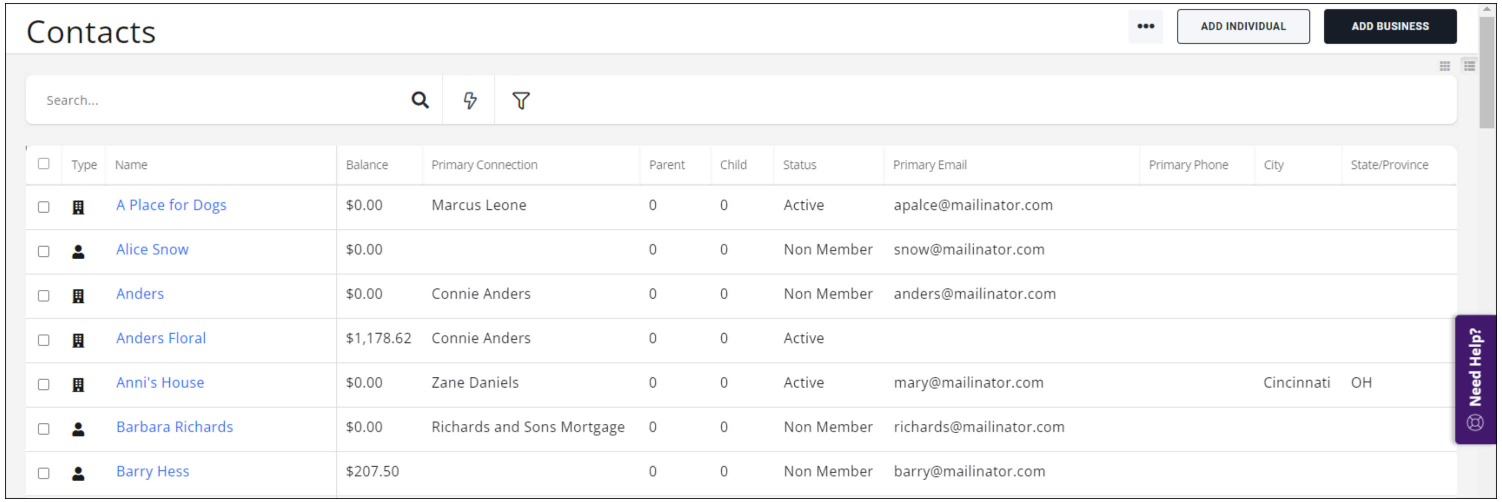
Contact Management

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



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

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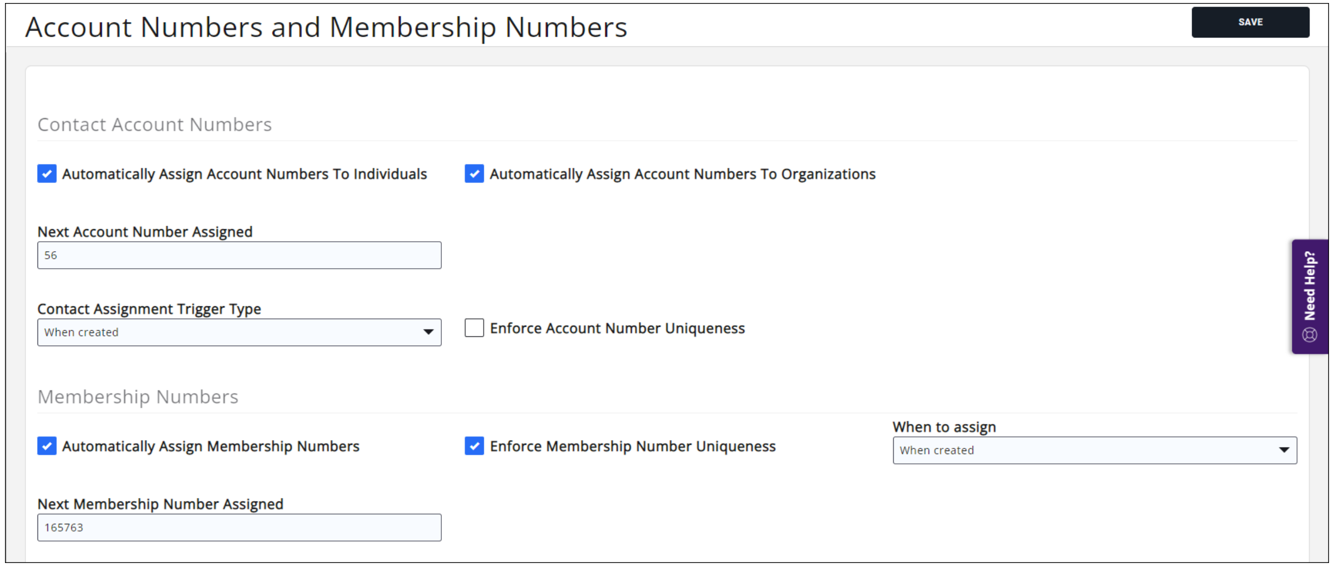
Initial Setup – Account Numbers

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



- 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

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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

Custom Fields

ADD

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

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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

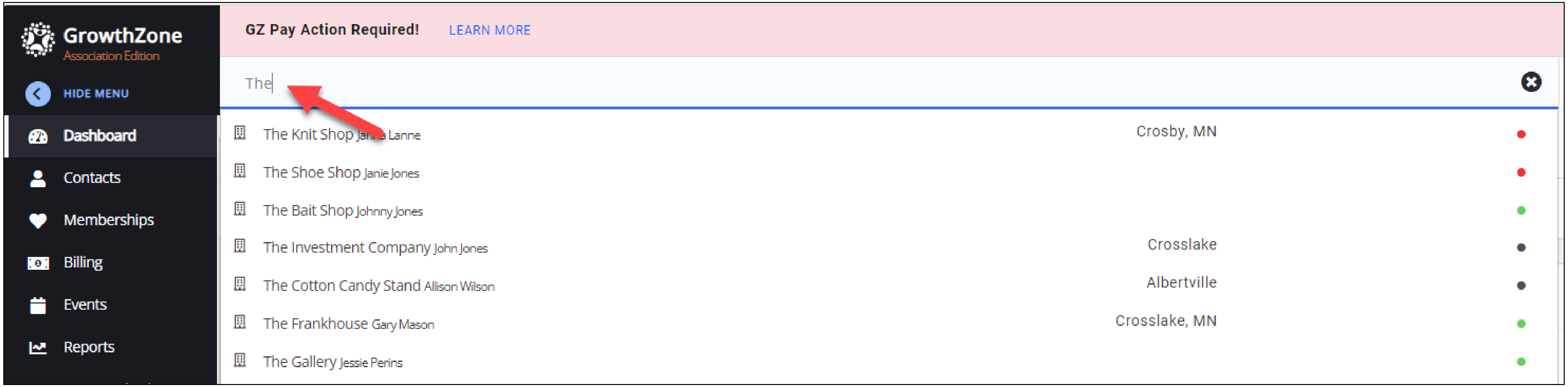
ADD

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

Searching for Contacts

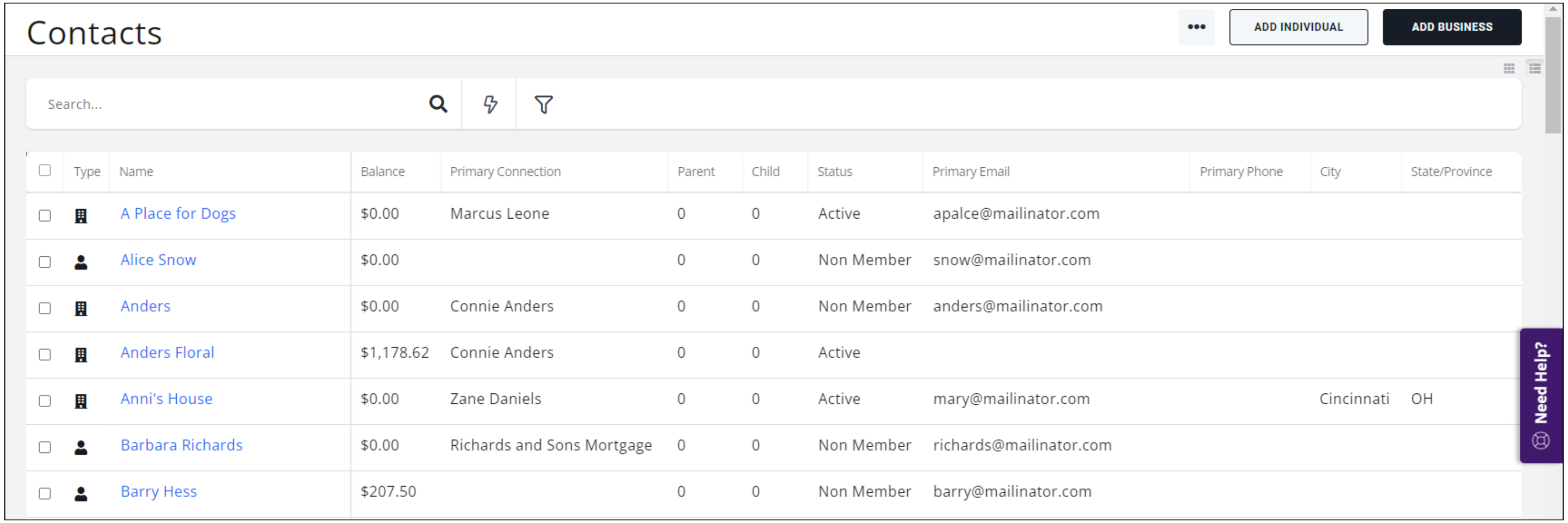
Global Search

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



Searching for Contacts

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



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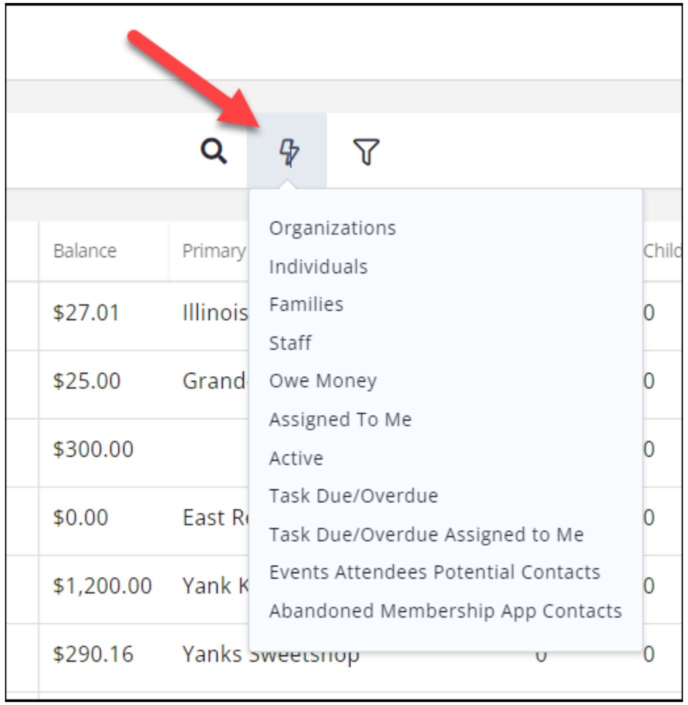
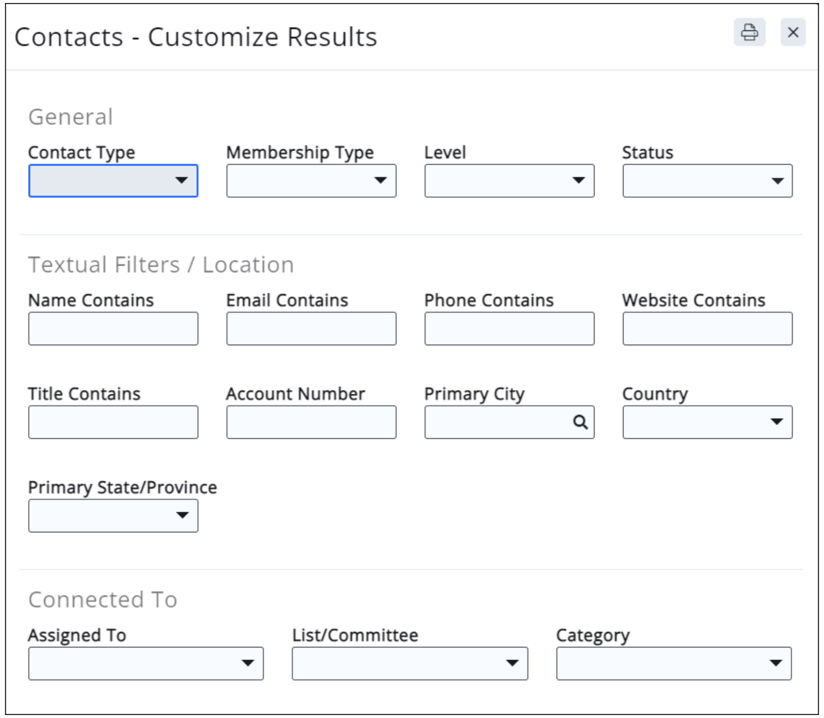
Searching for Contacts

KB: Search for Contacts

Show Only… drop down list



Customize Filter button



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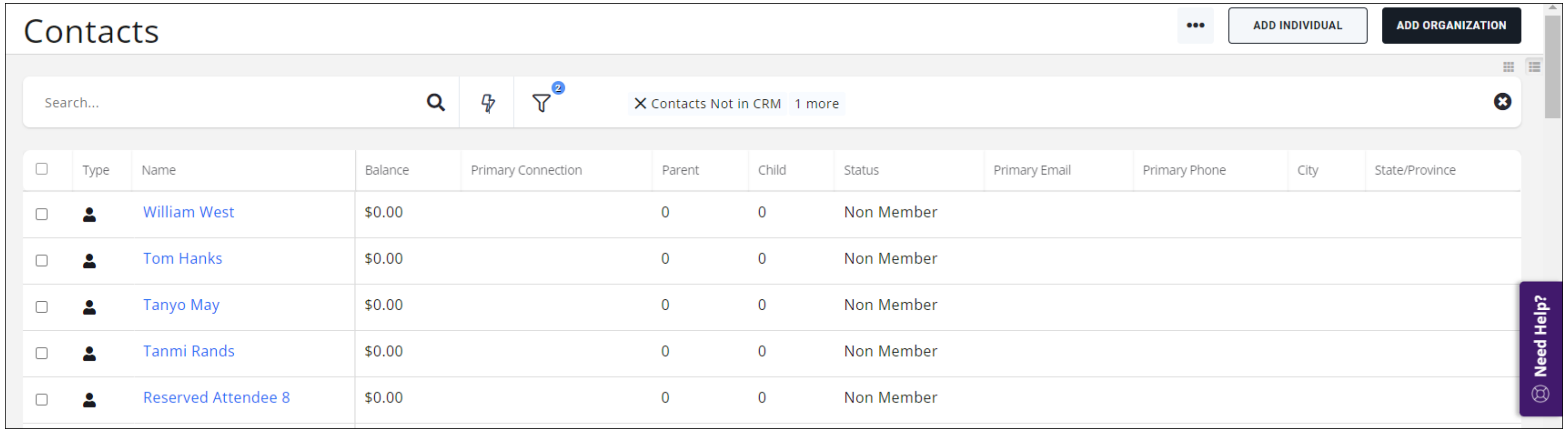
Find Event Attendees Potential Contacts

- 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]



Contacts

ADD INDIVIDUAL ADD ORGANIZATION

Search...

Contacts Not in CRM 1 more

	Type	Name	Balance	Primary Connection	Parent	Child	Status	Primary Email	Primary Phone	City	State/Province
		William West	$0.00		0	0	Non Member				
		Tom Hanks	$0.00		0	0	Non Member				
		Tanyo May	$0.00		0	0	Non Member				
		Tanmi Rands	$0.00		0	0	Non Member				
		Reserved Attendee 8	$0.00		0	0	Non Member				

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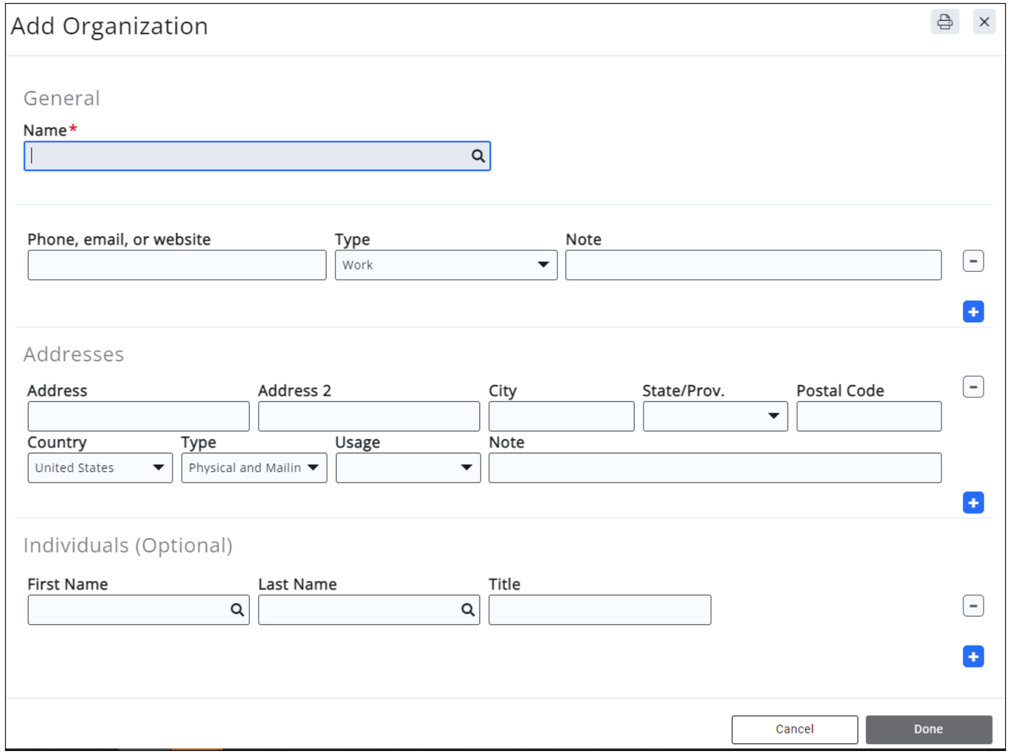
Add Contact

Quick Actions

- KB: Add Organization
- KB: Add Individual



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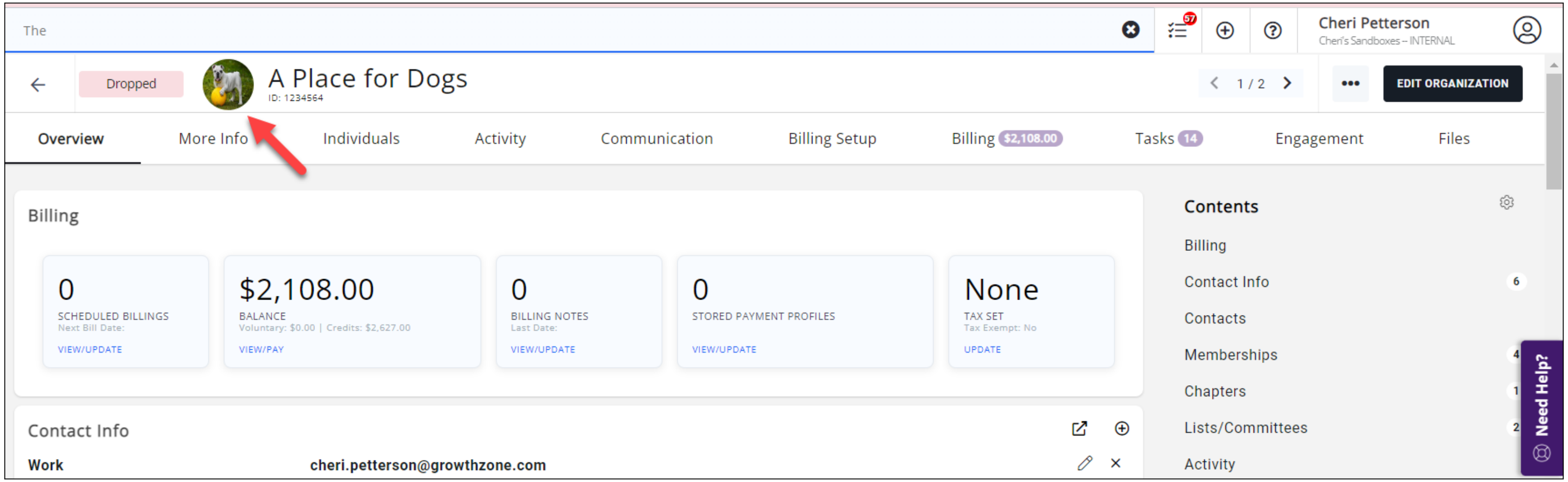
Contact Photo/Logo

- 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]



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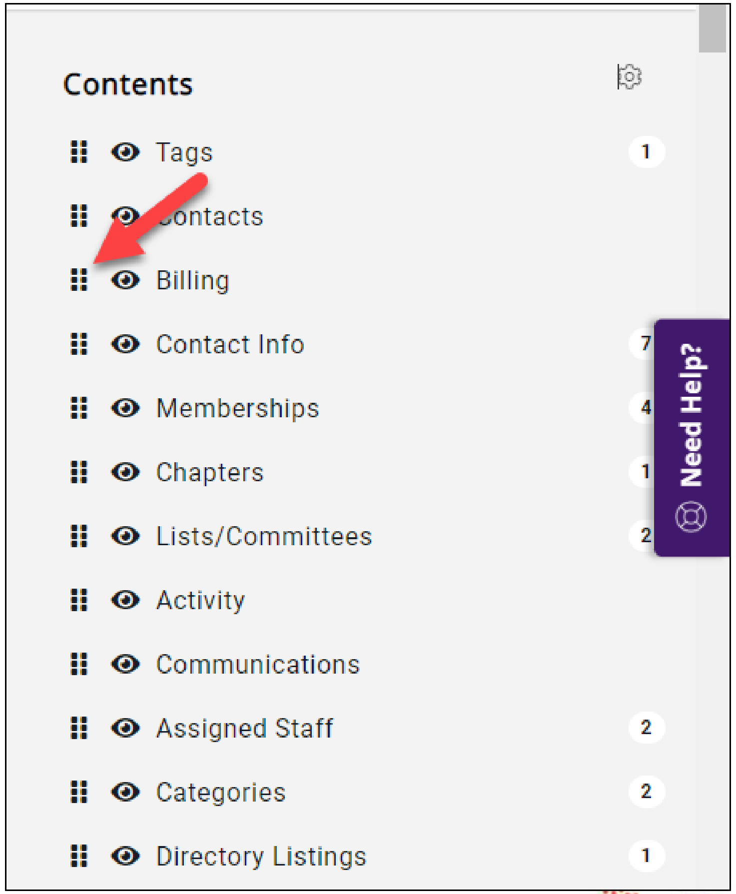
Contact Overview Tab

The Contact overview tab is where you will update phone numbers, email addresses, etc.

The display can be changed to best suit your needs



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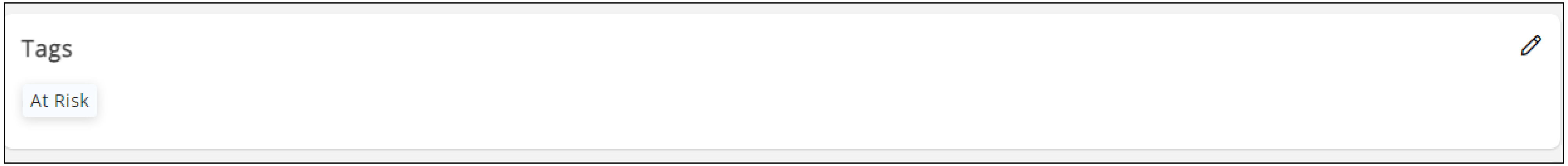
Contact Tags

- 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 because a member
- KB: [Add Tags to an Organization/Individual]



Default Contact Information

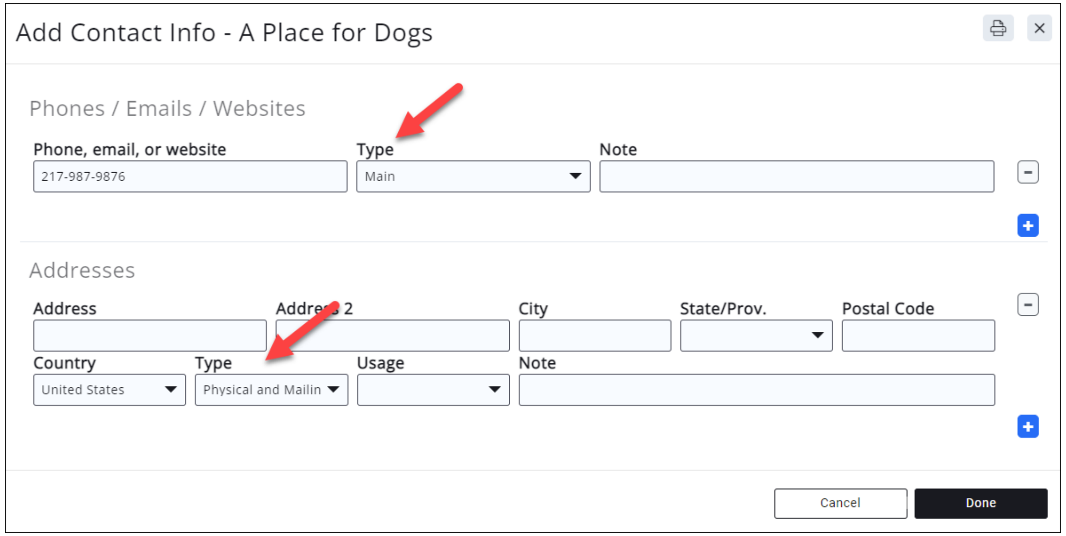
- When adding a new contact, be certain to select the appropriate defaults
- In general, the first phone, address, email will be marked as the default and will be used in email templates, documents, and when sending communications

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



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

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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

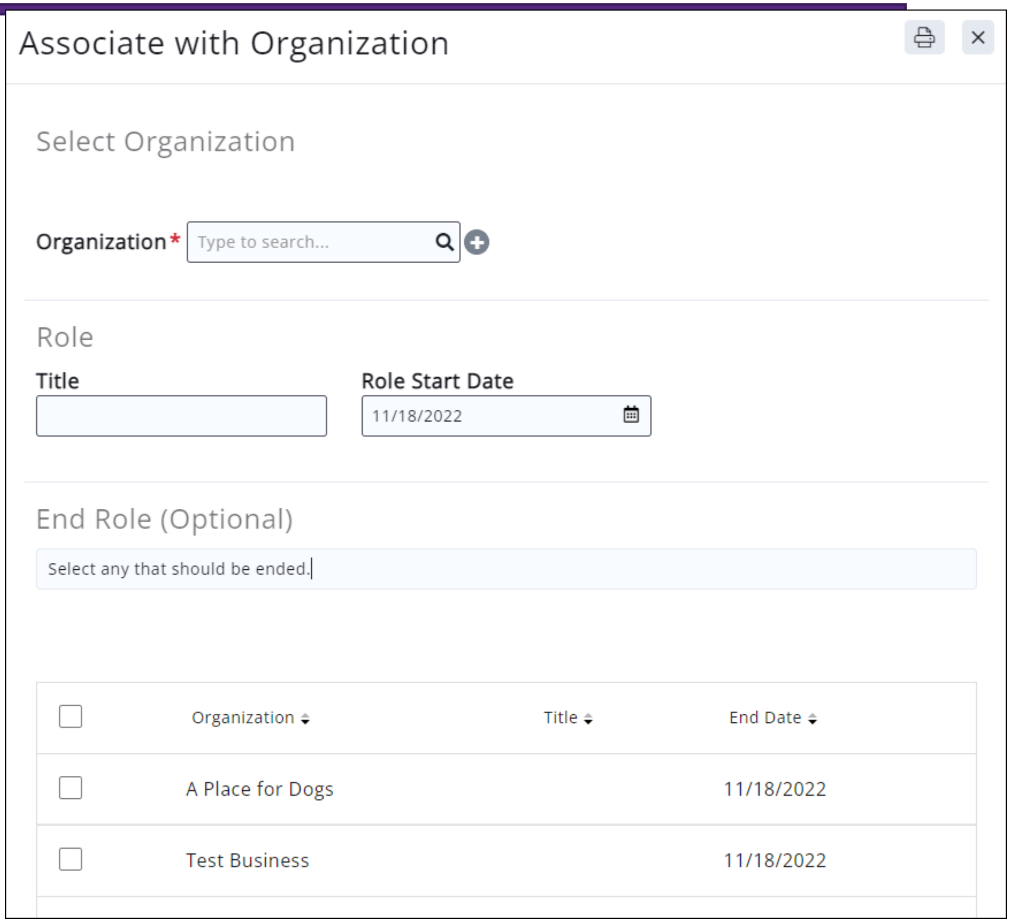
Offices

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



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Contact History

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

Contact Roles

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]

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)	

Employment

Number of Employees	
Number of Employees 2019	234
Part-Time Employees 2019	
Number of Employees 2020	190

Training Section

Ownership	

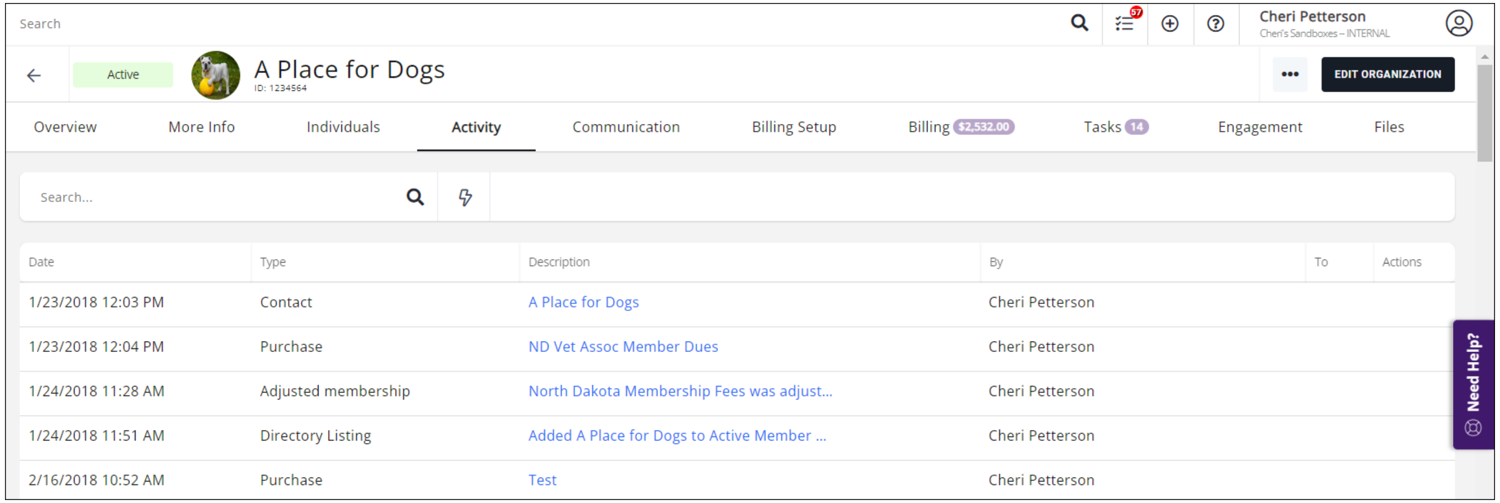
Miscelaneous

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]



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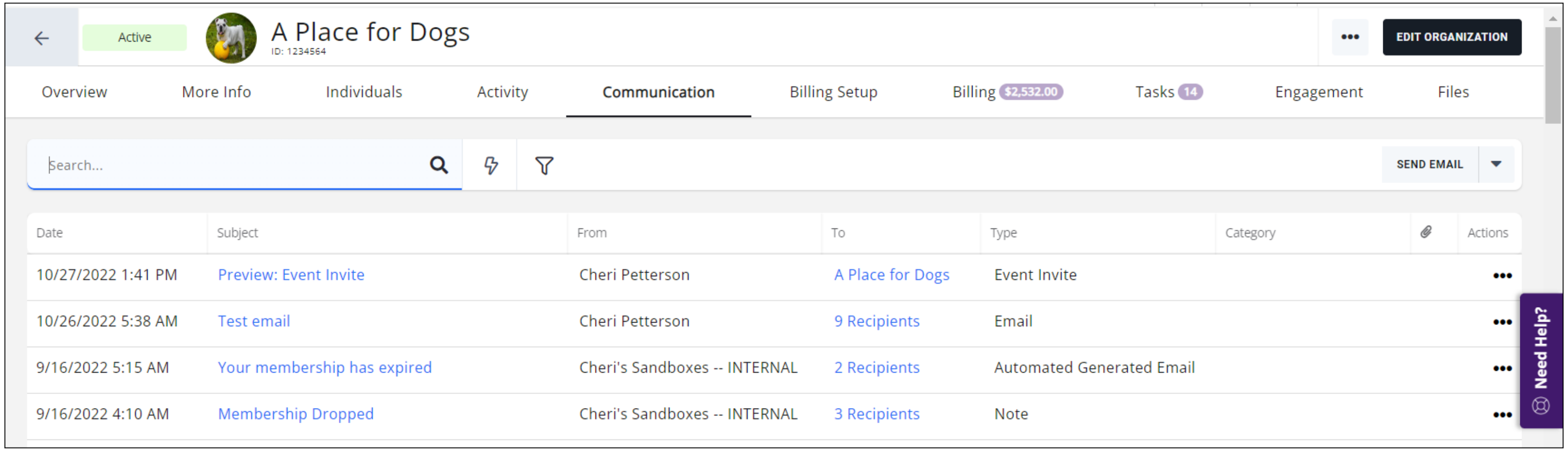
Contact Communications

- All communications with a contact are logged on the contact's Communications tab
- From here you can send emails and log notes/calls



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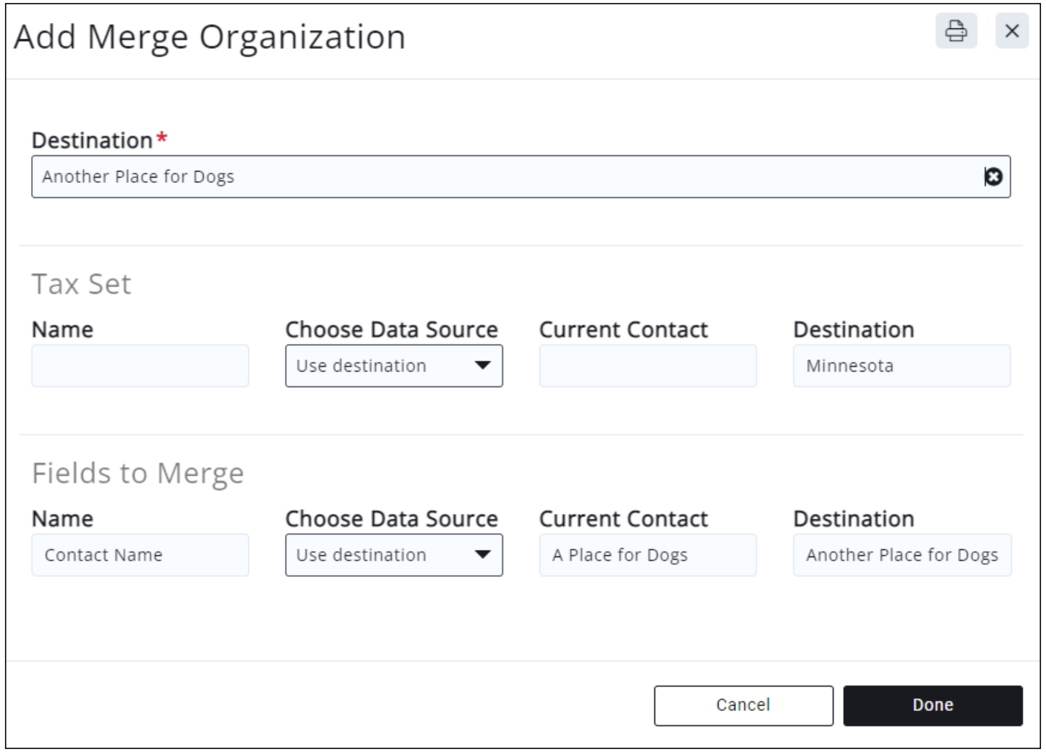
Merge Contacts

- 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]



Questions?