

What You Need to Know

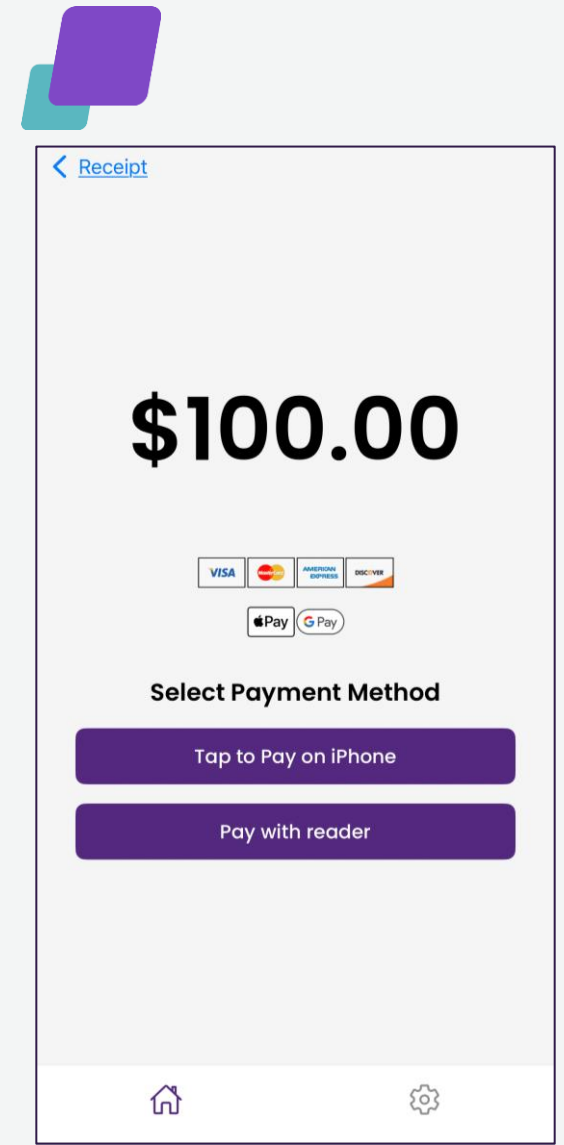
Welcome to the GrowthZone Pay App



Welcome to the NEW GrowthZone Pay App!

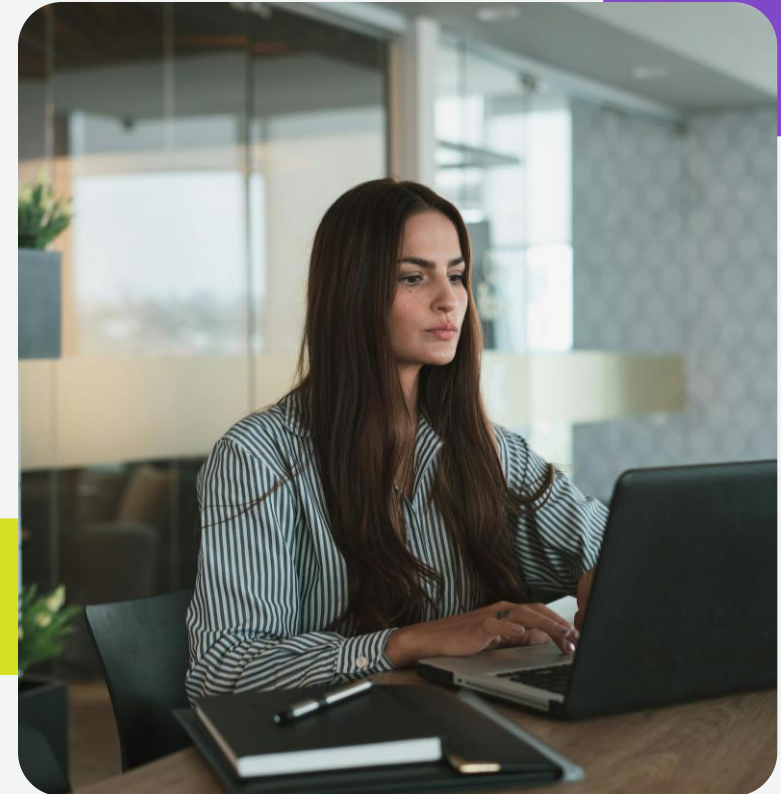
The GrowthZone Pay app lets your team take dues, event, and on-site payments anywhere—fully integrated with GrowthZone—so you skip extra portals, manual reconciliation, and clunky third-party POS systems.

With stored payment profiles, automated membership dues, and real-time mobile reader and Tap to Pay support, the GrowthZone Pay app helps teams sell more on site, collect payments at the perfect moment, and save hours of post-event data entry and reconciliation. Because everything runs through GrowthZone Pay with transparent, all-inclusive pricing and a single support team, staff can focus on members and events instead of chasing down spreadsheets, exports, and mismatched reports.



TODAY'S AGENDA

- Getting Started
 - Purchasing a Card Reader
 - Configuring your Gateway
 - Configure your Default Contact
 - Setting up Fee Items
- App Configuration
 - Download
 - Set up Tap to Pay
 - Pair External Reader
- Using the App
 - Point of Sale
 - Invoice Payment
 - Event Features
- Caveats, Provisos, Quid Pro Quos...





Section One:

Getting Started

Purchasing a Card Reader

GrowthZone has a special link to purchase the appropriate card readers from Stripe. The new reader is the Stripe Reader M2, and it includes tap-to-pay, chip, and swipe functionality.

You can also purchase docks and mounts separately from the reader.

More information on the reader:

<https://stripe.com/terminal/m2>

Website to purchase card readers:

<https://growthzone-readers.up.railway.app/>



Setting the Payment Gateway

The app collects payments using a single GZ Pay gateway. You can change the gateway for the app as often as you'd like.

Article:

[Configure Your Payment Gateway](#)

Name *
GrowthZone Pay Account

Options

- Default Gateway
- Default Gateway for Point of Sale App
- Allow Stored Payment Profiles
- Create stored payment profiles by default

Default Currency
United States Dollar

GrowthZone Pay Account Info

Business Name *
echobind dev

Credit Card Description *
ECHOBIND D

Bank Transfer Description * ⓘ
ECHOBIND DEV

Support Phone
[Empty field]

Email *
edgar@echobind.com

Support Email
[Empty field]

Support URL
[Empty field]

Bank Accounts ⓘ

usd	9991	110000000	STRIPE TEST BANK	US	[Edit icon]
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Setting the Default Contact

By default, the app records **Point of Sale payments** under the contact record of the staff user who is signed in to the app. If desired, you can set a default contact for **all** payments collected through the app. When accepting a payment, you will have the option to *Link a Transaction* to an existing contact, *Create a New Contact*, or *Skip Linking* the transaction.

You can set up a unique individual contact for this purpose if you wish- it doesn't have to be a staff member!

Article:

[Configure Your Payment Gateway](#)

The screenshot shows the 'Setup' screen for 'GZ Pay Settings'. The 'Payment Methods' section includes several checkboxes: 'Accept Visa', 'Accept MasterCard', 'Accept American Express', 'Accept Discover', 'Allow Apple Pay and Google Pay', and 'Allow ACH'. There is also a 'Require ACH Above Predetermined Amount' checkbox and a 'Maximum Credit Card Amount Allowed' input field set to 50000. The 'Default Contact for POS App' dropdown menu is highlighted with an orange border and contains the name 'John Doe'. Below this is the 'Payment Methods Order' section, which is a table with a 'Name' column and three rows: 'Credit Cards', 'Mobile Wallets - ApplePay/GooglePay', and 'ACH', each with a vertical double-headed arrow icon for reordering.

	Name
↑ ↓	Credit Cards
↑ ↓	Mobile Wallets - ApplePay/GooglePay
↑ ↓	ACH



Section Two:

App Configuration

Download the App

The app is available for United States-based GrowthZone customers.

- [For iPhones and iPads running iOS 16.7 or later](#)
- [For Android devices](#)

You can choose whether you'd like to accept payments via a card reader or through Tap to Pay on your device*.

Article:

[Configure the App](#)

*iPads and Macs do not have the hardware to accept payments via Tap to Pay, so you'll only see an option to connect a card reader on these devices.

Set Up Tap-To-Pay

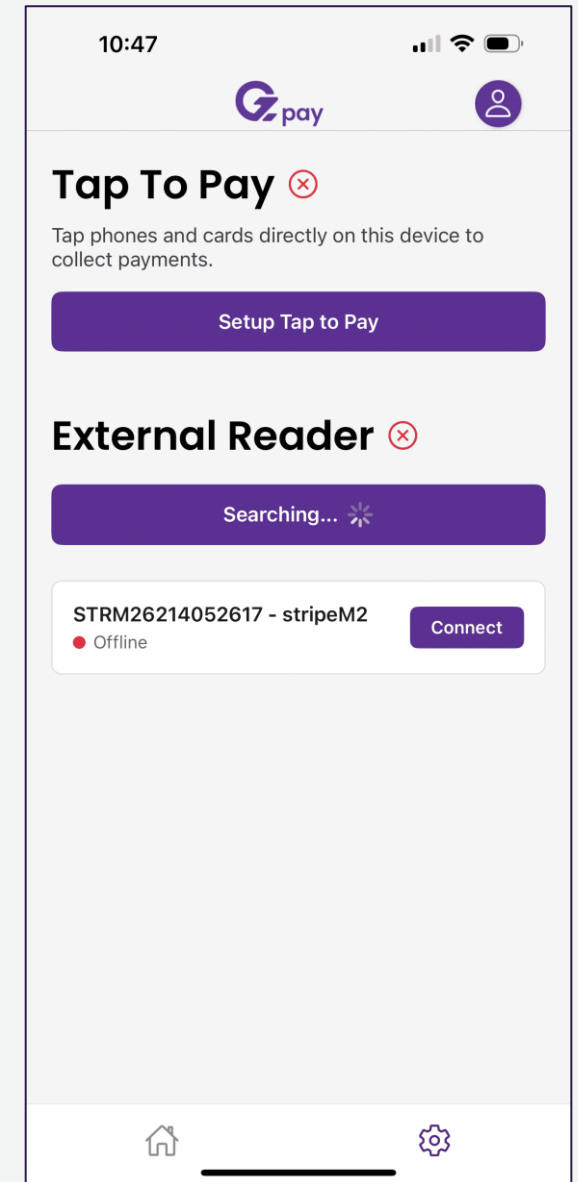
Tap to Pay

Tap the Setup Tap to Pay button, then follow the on-screen prompts to complete the setup on your device.

Article:

[Configure the App](#)

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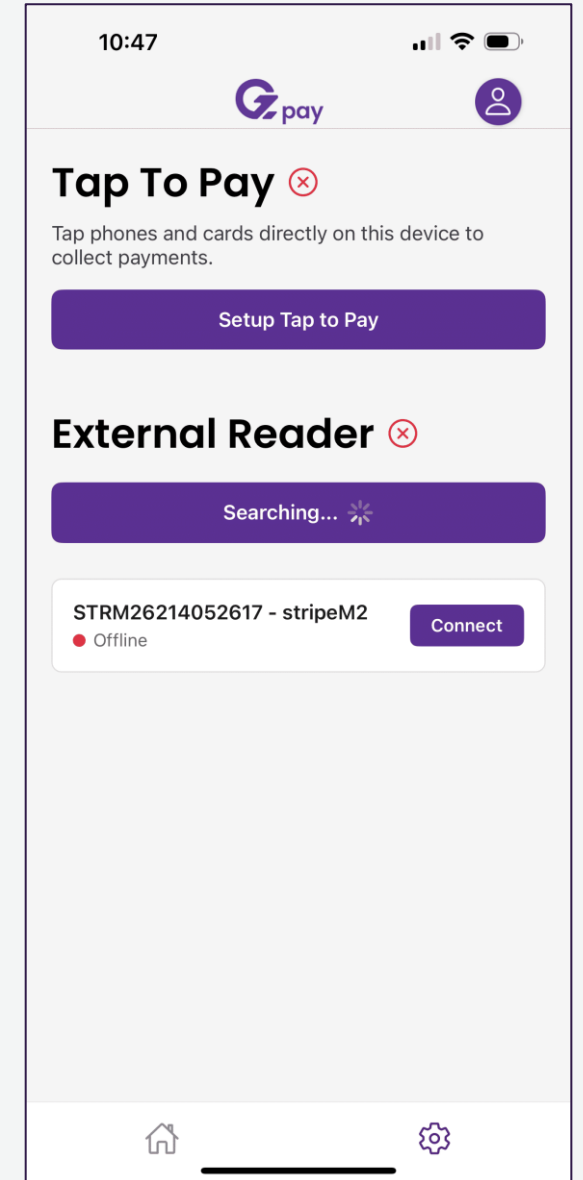
Pair External Reader

External Reader

Currently, the only external reader supported by the app is [the Stripe M2 reader](#). To pair the reader, press the side button until you hear a beep. The 4 green lights on the front of the reader will flash to indicate the reader's battery charge state and [will indicate if the device is able to connect or connected to the device](#).

Article:

[Configure the App](#)





Section Three:

Using the App- Point of Sale

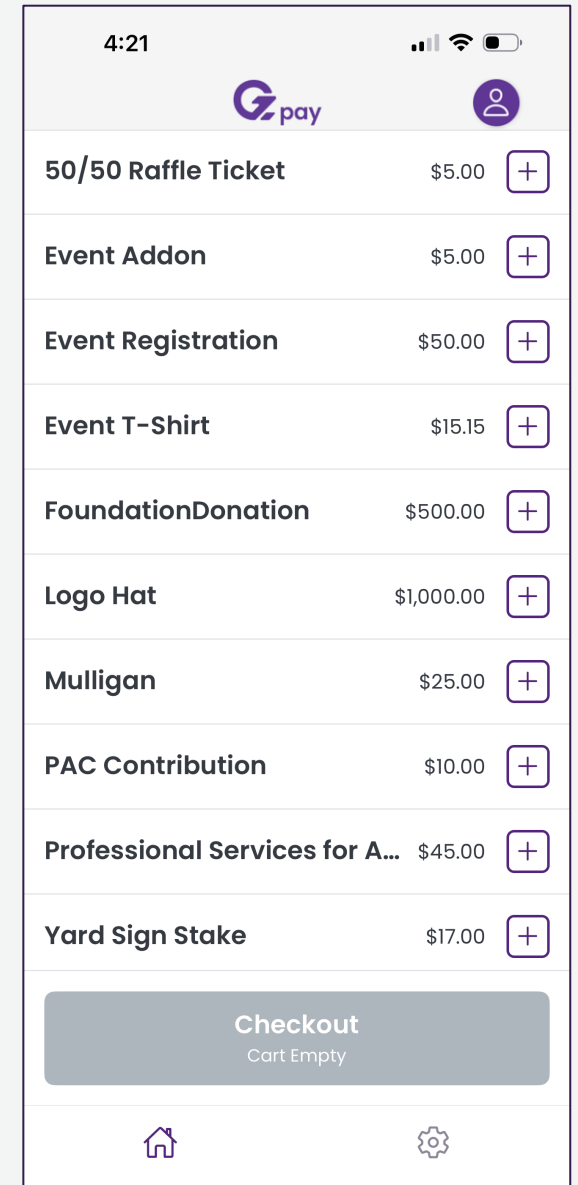
Point Of Sale

Item List

This is the default view of items for sale in the app. This list contains all fee items that you've previously flagged in GrowthZone for use in the app. The Checkout button displays the number of items and the total value of the cart.

Article:

[Accepting Payments](#)



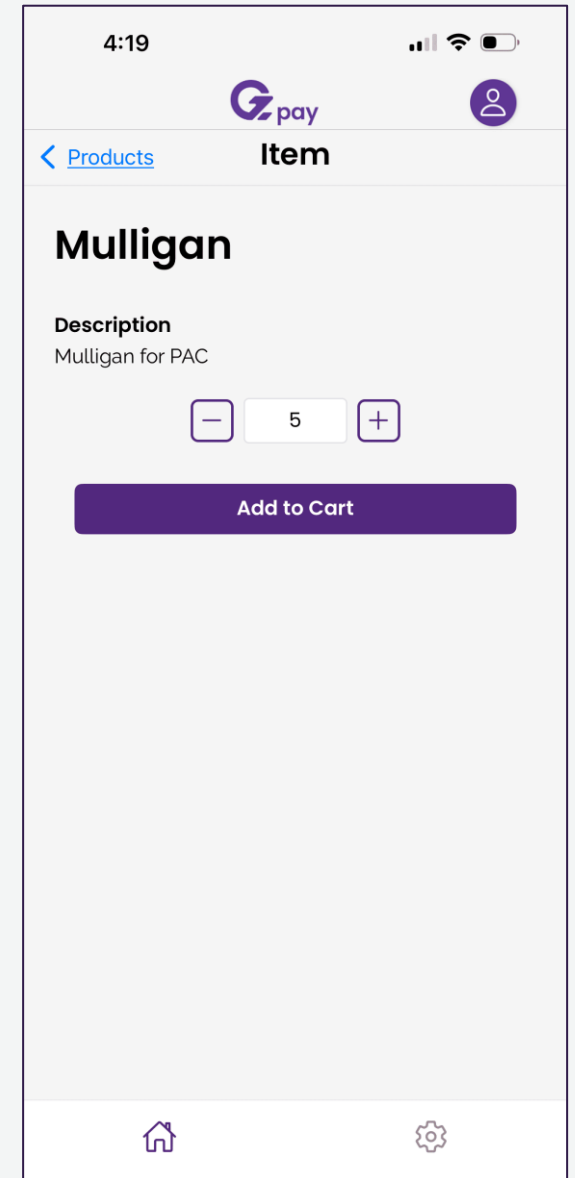
Point Of Sale

Item Details

Select items to sell by either tapping the plus icon next to an item or tapping on the item's name. Tapping on the item's name will allow you to adjust the quantity of the item to add to the cart.

Article:

[Accepting Payments](#)



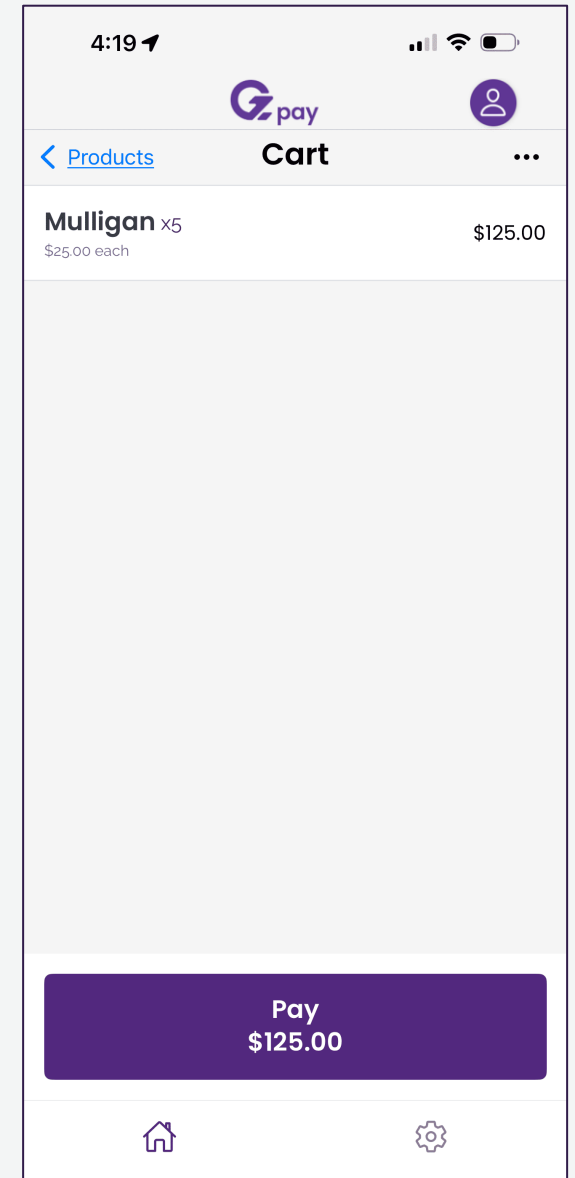
Point Of Sale

Cart

Items you've added to the cart are visible for review before you continue to the checkout process. Tap **Products** to return to the Item List to add more items, or **Pay** to check out.

Article:

[Accepting Payments](#)



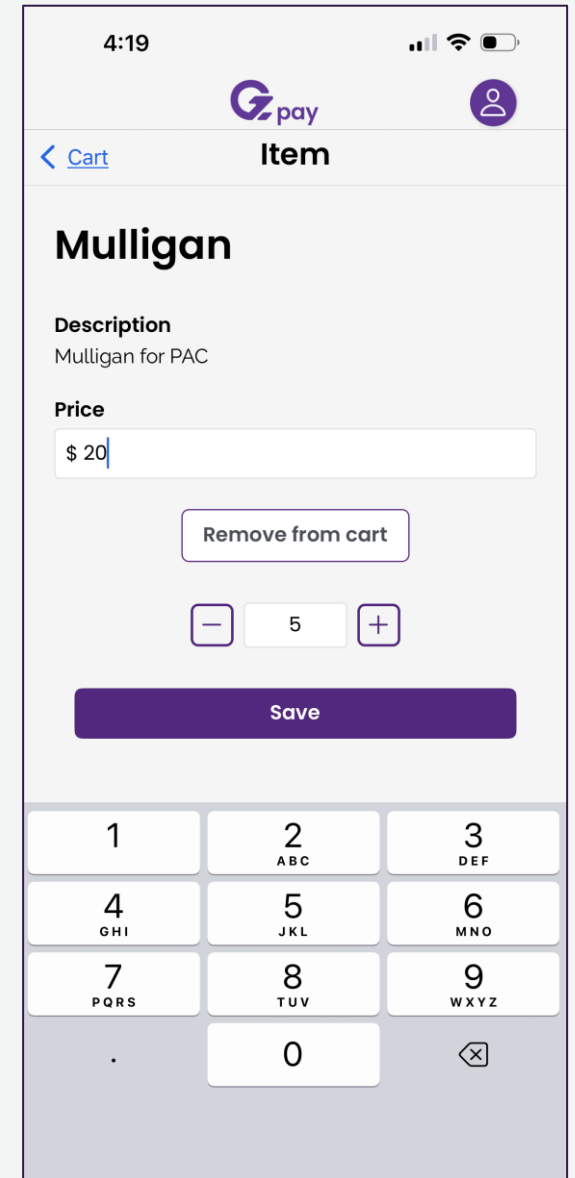
Point Of Sale

Cart Detail

Tap on an item to adjust its price or quantity. Tap **Remove from Cart** to remove the item; tap **Save** to go back to the cart and adjust another item or complete checking out; tap **Cart** to leave the screen without making any changes.

Article:

[Accepting Payments](#)



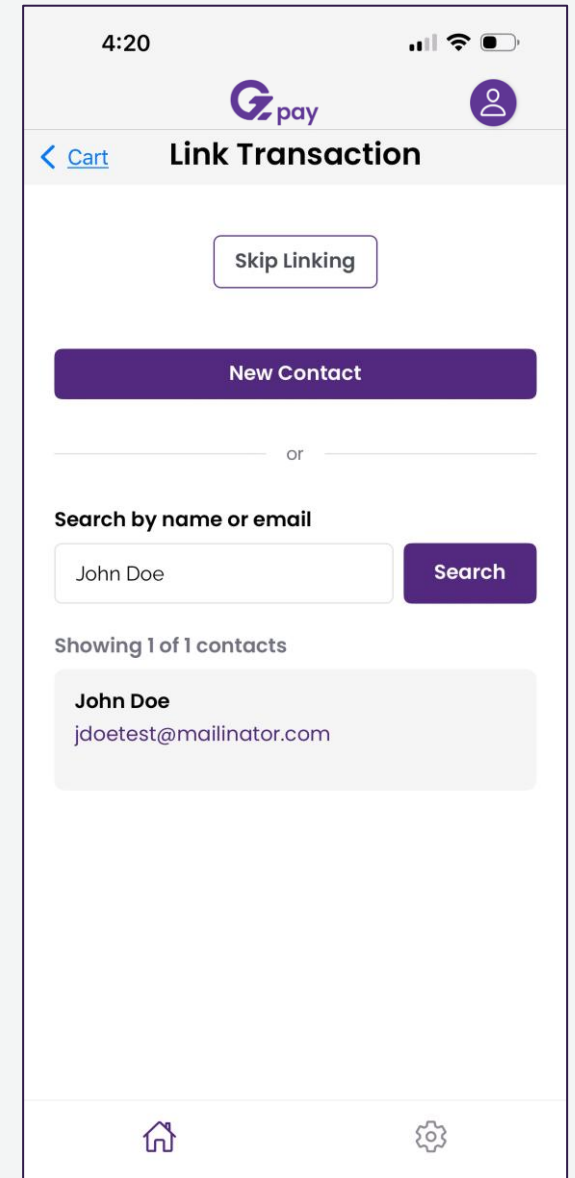
Point Of Sale

Link Transaction

Link a transaction to a contact to increase the accuracy of your payment records in GrowthZone. We recommend linking transactions that are meaningful to your relationship with a member or event attendee. For example, large PAC contributions, silent auction purchases, or payments for membership or sponsorship items are more useful in GrowthZone if you can see them in combination with other purchases, membership, and engagement information.

Article:

[Accepting Payments](#)



Point Of Sale

Link Transaction

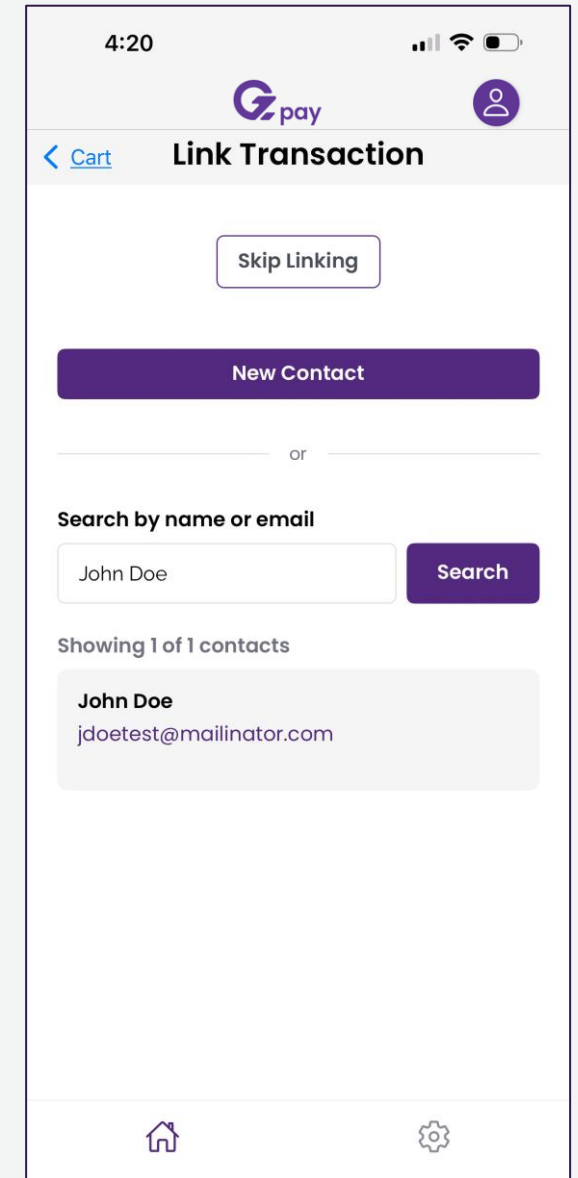
Use the name/email search to find an existing contact. After finding the contact, **tap on the name card** to link the transaction to them.

Tap **New Contact** to create a basic contact on the fly during the checkout process.

Food and beverage, merchandise, or other nominal purchases may not be worth tracking against a specific contact. Use the **Skip Linking** button to skip the transaction link for purchases like this.

Article:

[Accepting Payments](#)



Point Of Sale

Email Receipt

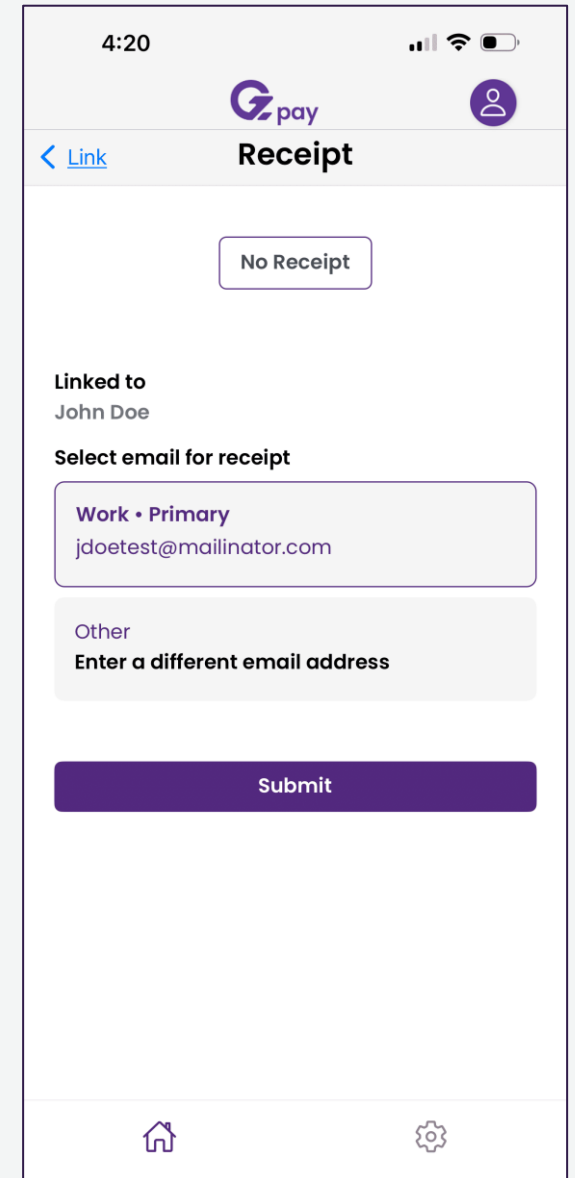
If you've linked a contact to the transaction, you'll see that contact's primary email address. Tap on **Other** to add a different email address for the receipt.

- ✓ Note: the Other email address will not be saved on the linked contact's record.

If the purchaser does not need a receipt, tap **No Receipt**.

Article:

[Accepting Payments](#)



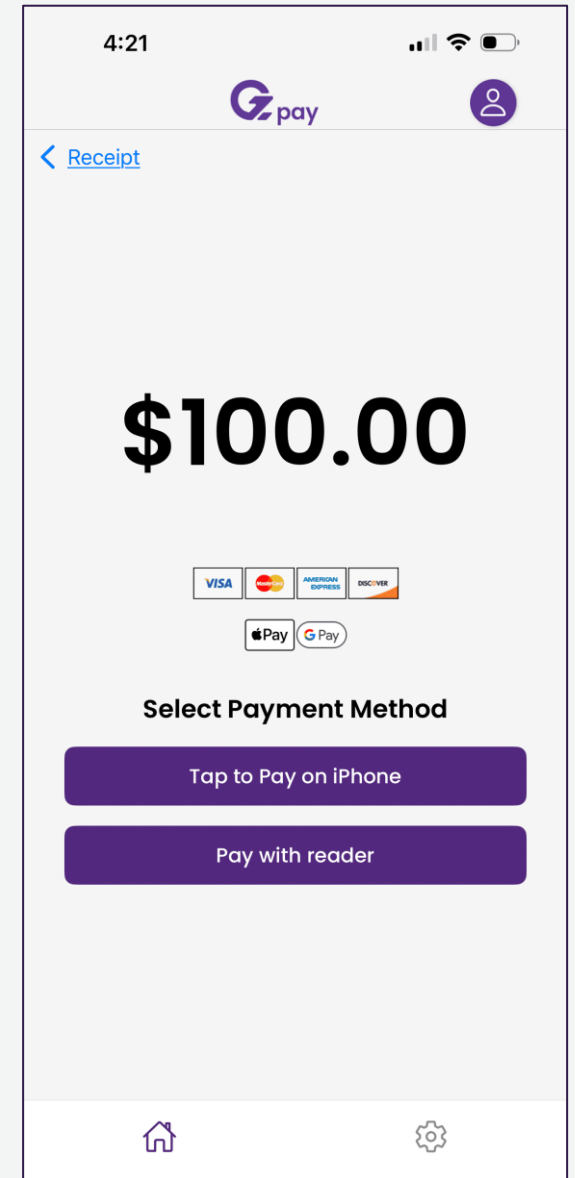
Point Of Sale

Payment Type Selection

Choose whether you'd like to complete the payment using Tap to Pay (iPhone only) or your connected Bluetooth card reader. After selecting an option, follow the prompts in the app to pay with a card or another contactless payment method.

Article:

[Accepting Payments](#)





Section Three:

Using the App- Invoice Payment

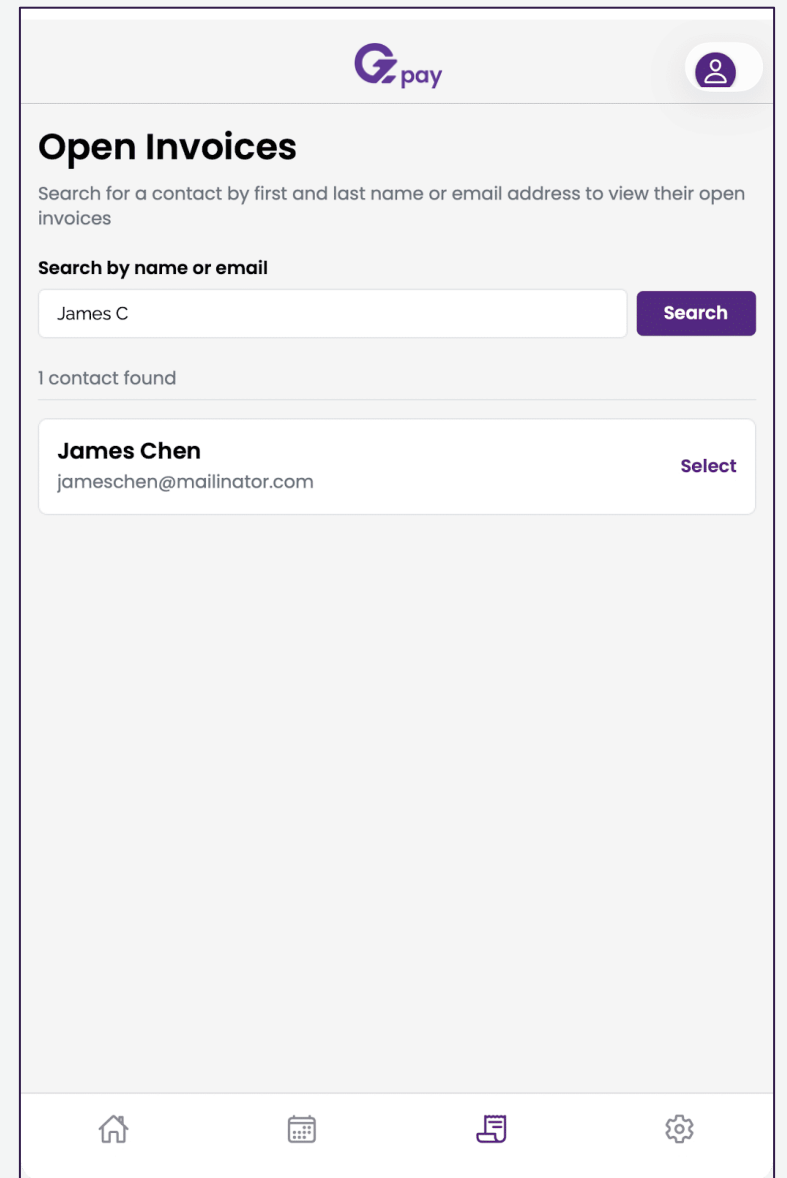
Invoice Payment

To collect payments for open invoices, tap the invoice icon in the bottom row of navigation icons. From there, enter the name or email address of an individual with an open invoice*. Select the individual that you'd like to collect a payment from.

Article:

[Paying Open Invoices](#)

*Invoices for organizations are not currently available in the app. Searching for and paying for these invoices will be added in a future release.



Invoice Payment

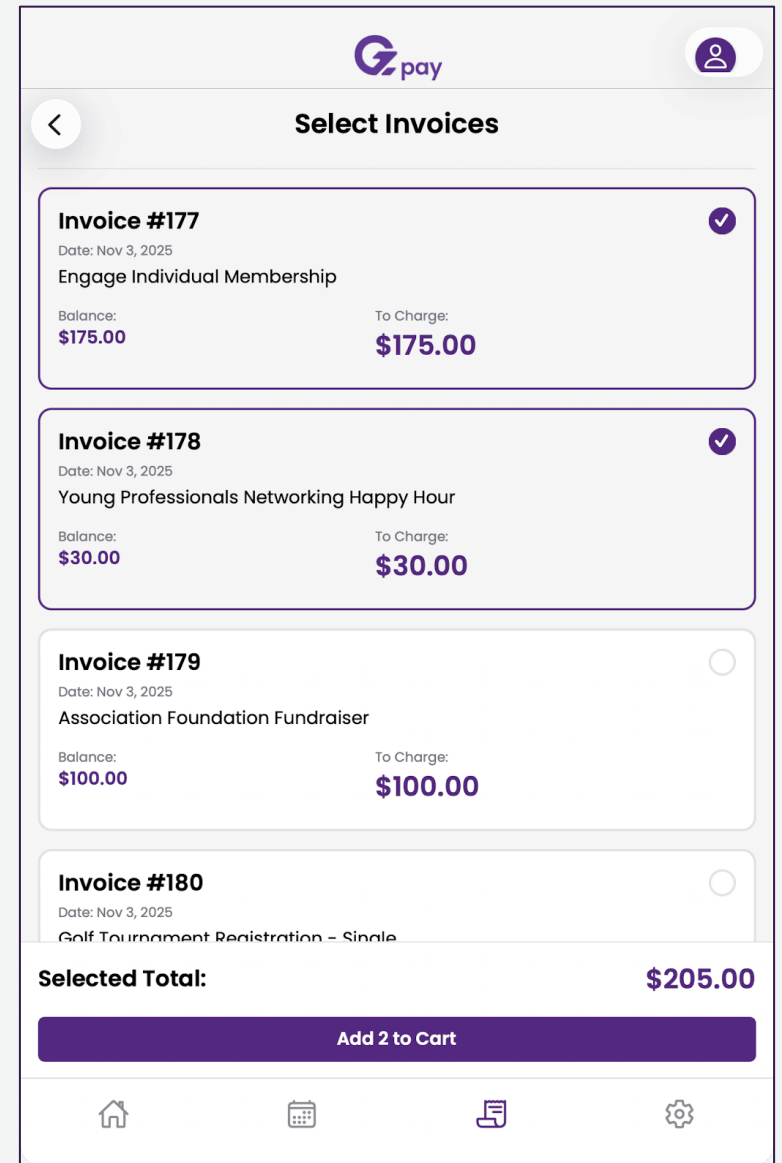
After choosing a contact, the app will show a list of all open invoices. Select one or more invoices to collect a payment for them. Tap Add to Cart to continue collecting a payment.

The cart will show each line item of a selected invoice. For example, if you select 2 invoices, you may see more than 2 items in the cart.

Article:

[Paying Open Invoices](#)

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Invoice Payment

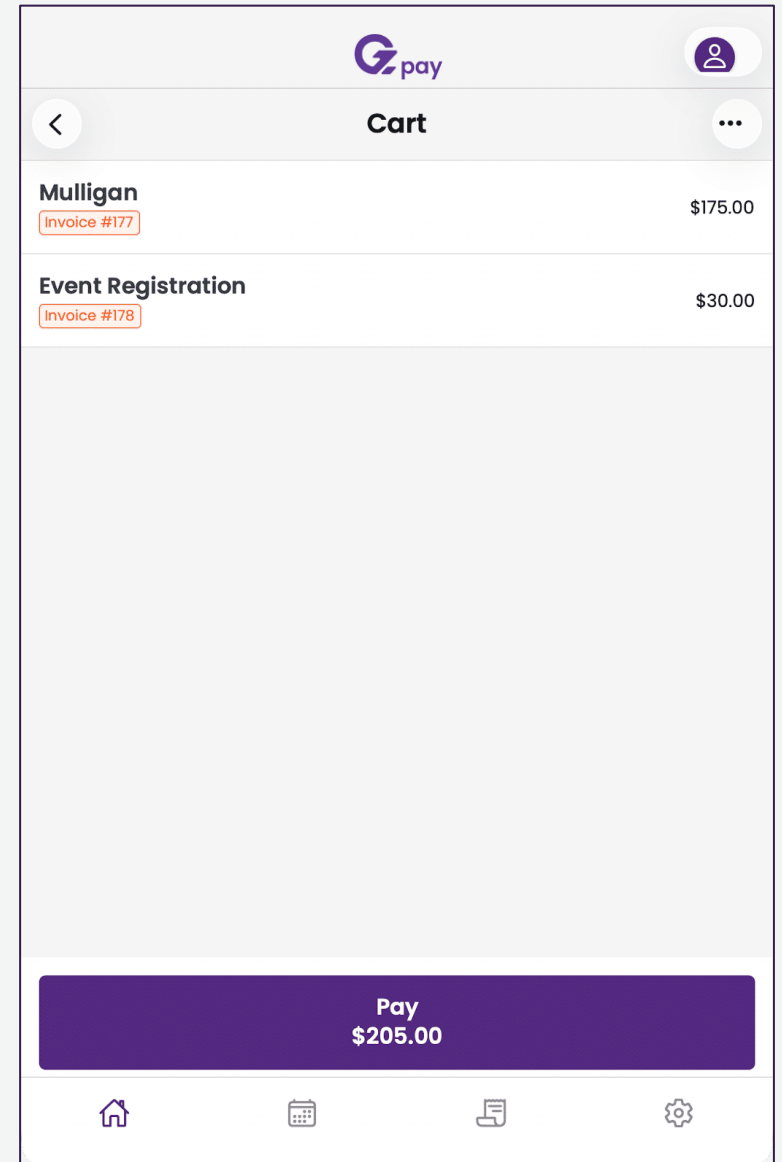
Each line item from a selected invoice will appear as a separate item in the cart. All line items for an invoice must be paid together.

Voluntary items can have their price changed if a member wants to pay more or less than the invoiced amount. Required items cannot have their price changed.

Article:

[Paying Open Invoices](#)

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Invoice Payment

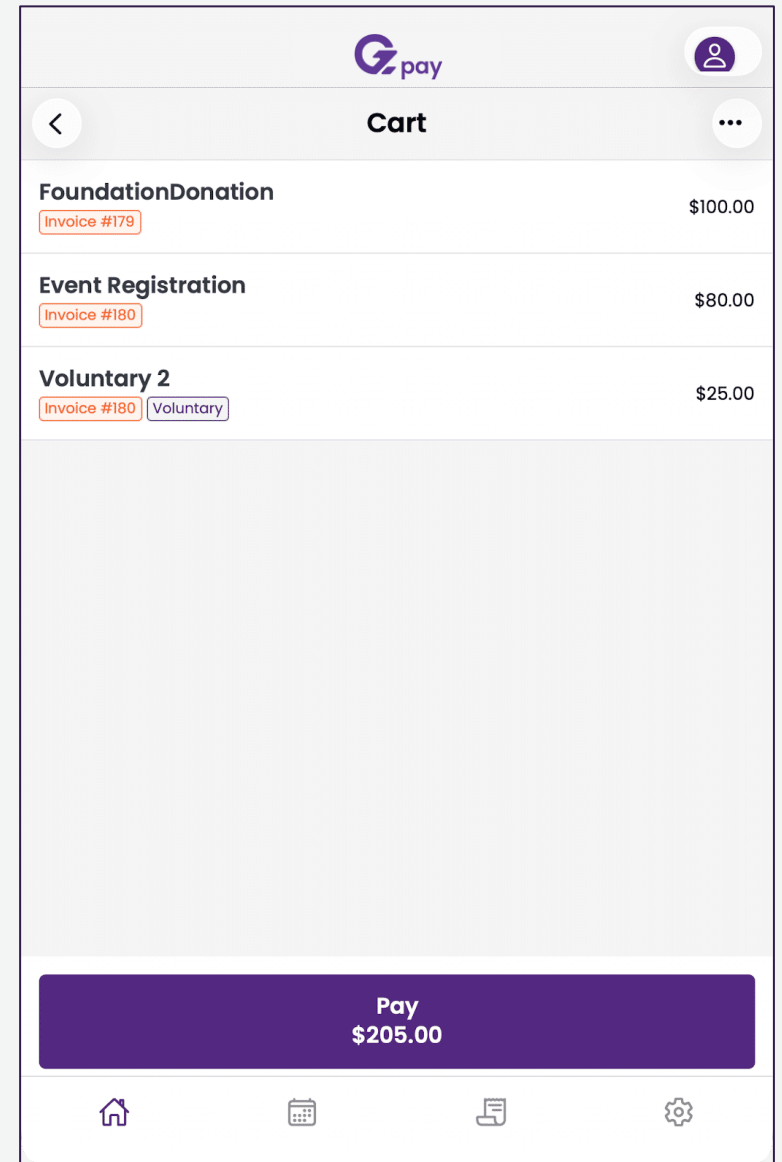
After reviewing the cart and adjusting any voluntary items, tap **Pay** to complete the payment process via tap-to-pay or the card reader.

This cart example shows a cart with 2 invoices, Invoice 179 and Invoice 180. Invoice 180 has 2 line items, and the **Voluntary** tag indicates that the price on that item can be changed if needed.

Article:

[Paying Open Invoices](#)

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Section Three:

Using the App- Event Features

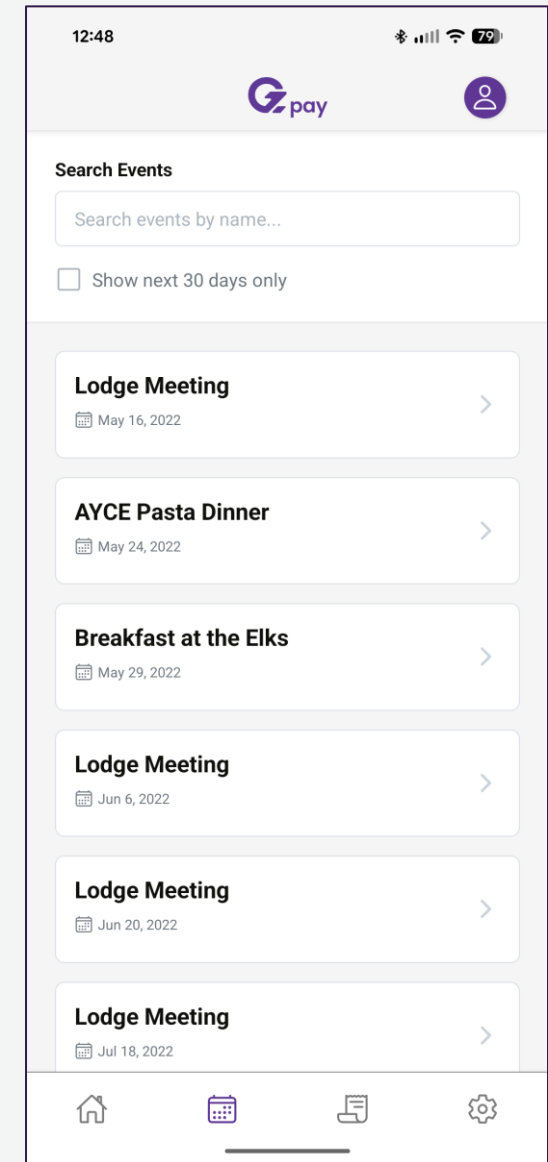
Event Features

Check in attendees, take registrations at the door, collect payments for open invoices, and even direct them to their team or table.

Start by tapping on the *calendar icon* in the bottom navigation of the GZ Pay app, then search for and select your desired event.

Article:

[Event Check Ins](#)



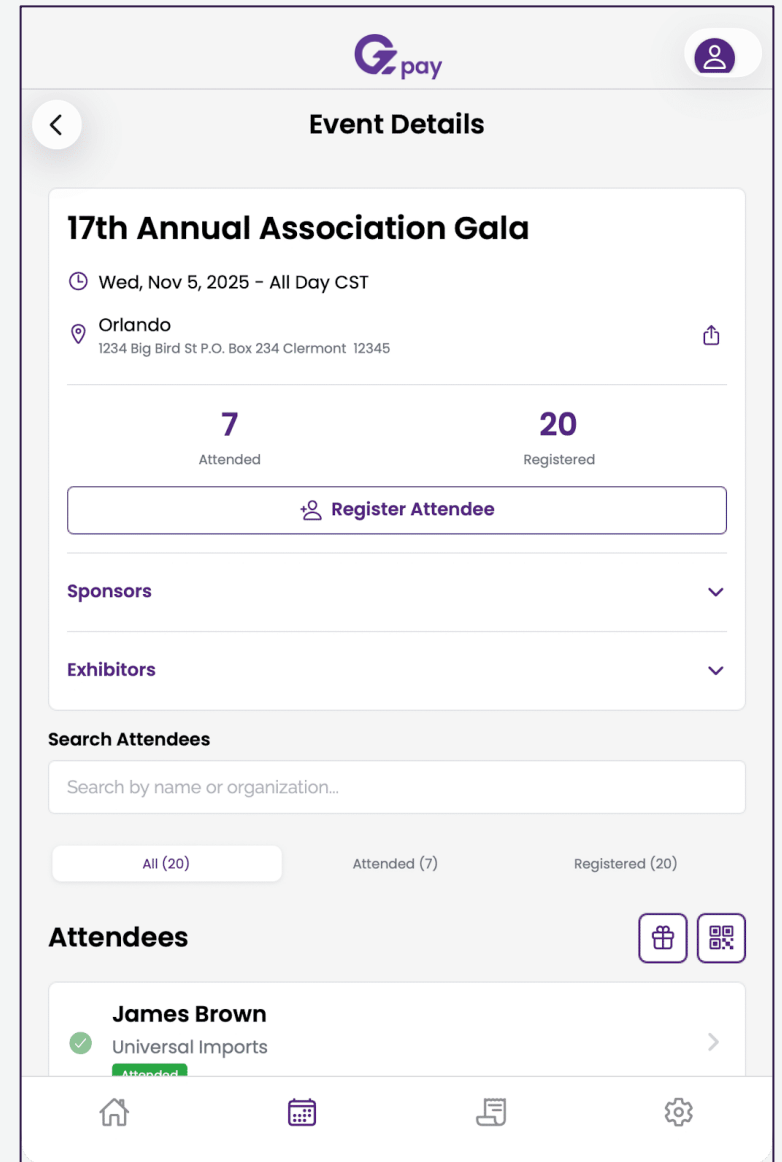
Event Features

Event Overview

The event overview has quick access to your event details, sponsors, exhibitors, and a full list of attendees. Either scan a QR code by tapping the icon; search for your attendees by name or organization; or select them from the list. If you must check in several attendees from the same company, just search for the company and quickly check in each person.

Article:

[Event Check Ins](#)



Event Features

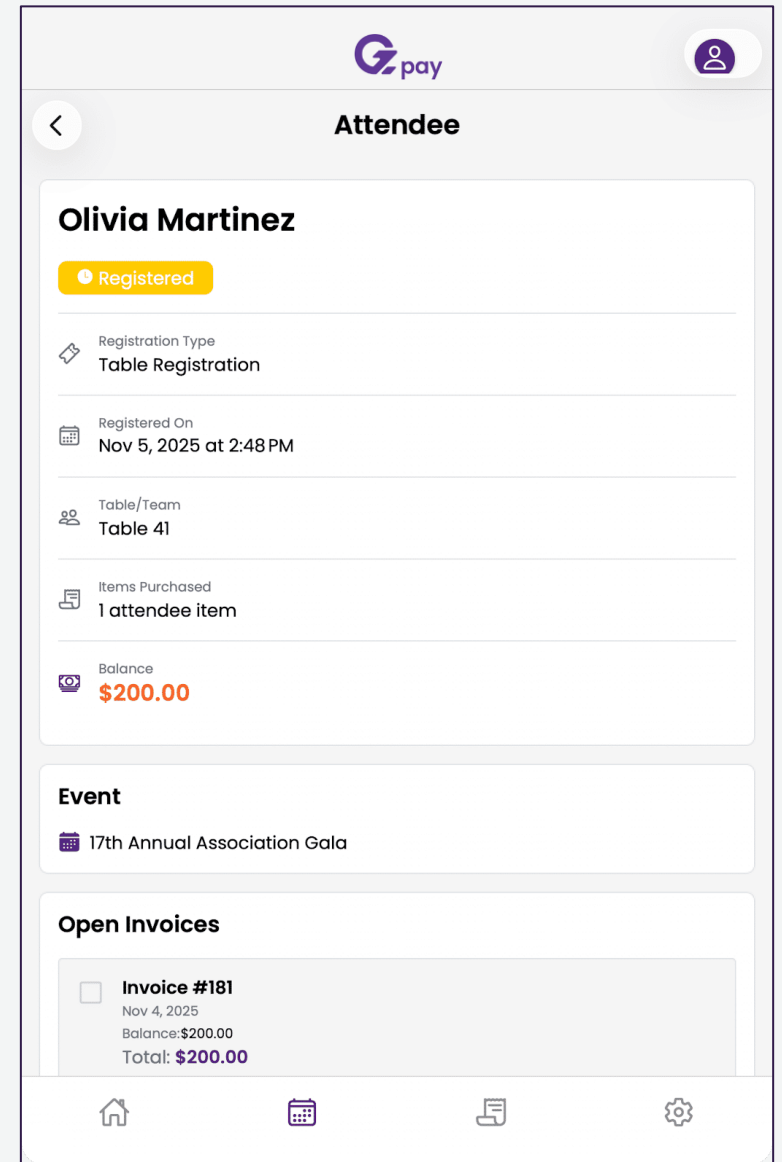
Attendee Overview

Review registration type and date, Table/Team assignment, additional items, and balance remaining for any registered attendee. Selecting any open invoices* will allow you to accept payment.

Article:

[Event Check Ins](#)

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Event Features

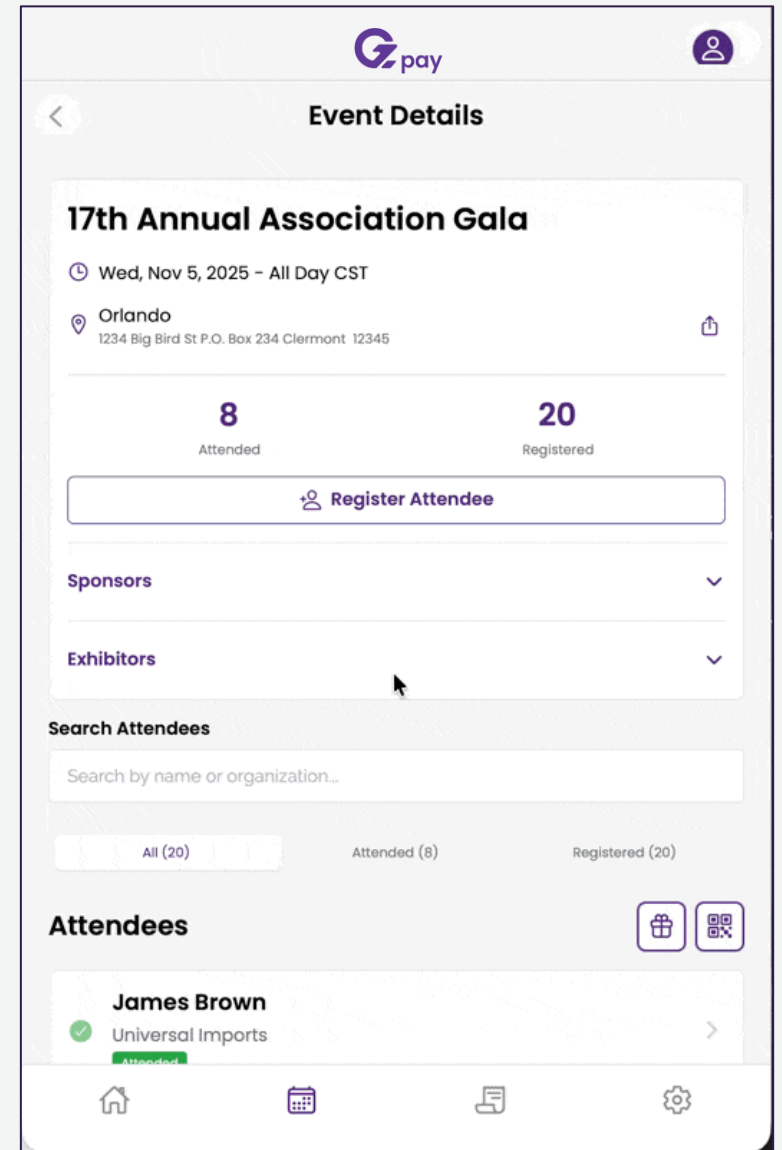
Random Drawing

Do you need to select a registrant or attendee for a random drawing? Tap on the **Gift icon** on the event detail page to open the Random Drawing overlay. Choose whether you want to select a random winner from attendees only or from everyone registered for the event. Drawn winners* appear at the bottom of the overlay for quick reference, and you can draw more than one winner.

Article:

[Event Check Ins](#)

*Winners are not synced between multiple staff users using the app.





Section Four:

Caveats, Provisos, Quid Pro Quos...

Caveats, Provisos, Quid Pro Quos...

Paying Open Invoices

- Only invoices for *individuals* are currently available to pay via the app. Business invoices will be available in a future release.

Calendar display

- Currently there is a bug in the calendar display; upcoming events will not automatically show, but you can search for them. This is being addressed by development and will be fixed soon.

Multiple gateways/fee item splits

- The app does not support payment gateway splits defined on invoices using fee items that are set to use differing gateways. If such an invoice is paid via the app, the app will use its configured gateway only.



Thank you.



GROWTHZONE