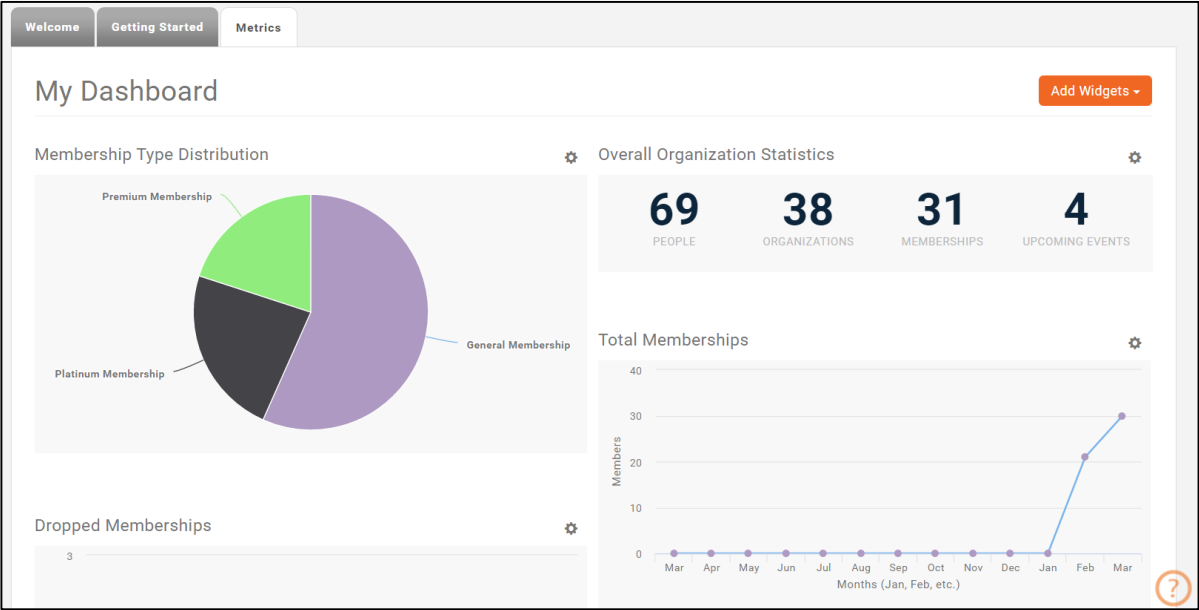


GrowthZone Solution Overview



System Navigation Overview of GrowthZone Modules



GrowthZone is the smart association software designed to help you:

- ❖ Grow your membership
- ❖ Retain and engage your existing organizations or individuals
- ❖ Do more with less time

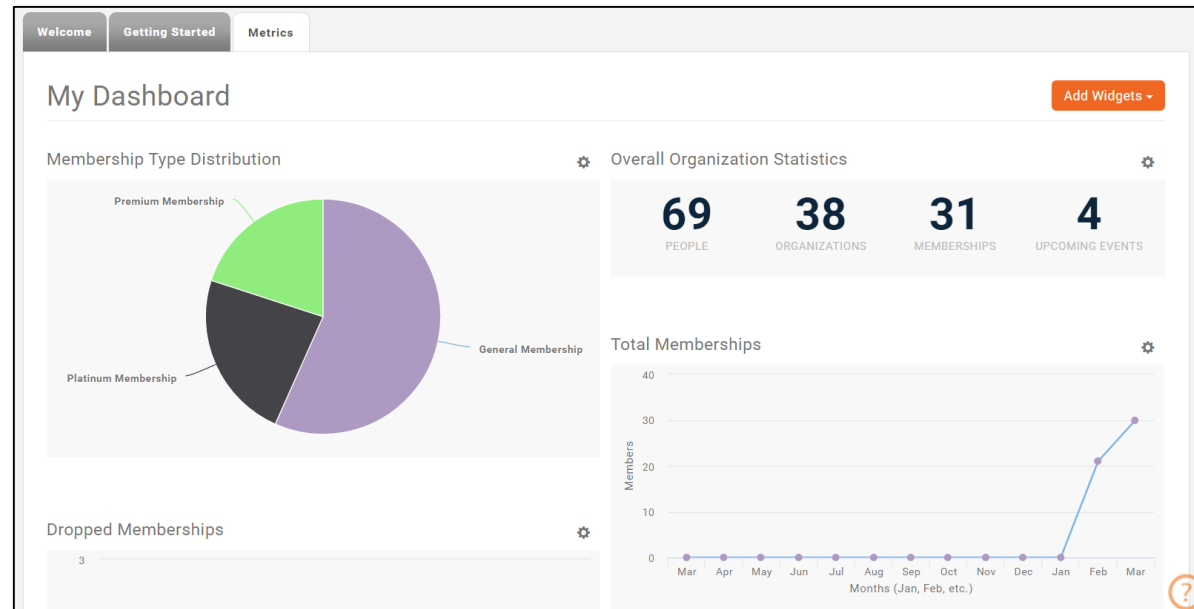
Easy to use, and designed to manage all the day-to-day operations of your organization

Three Different Views

- Staff/Database View
- Member View
- Public View

Overview – Staff View - Database

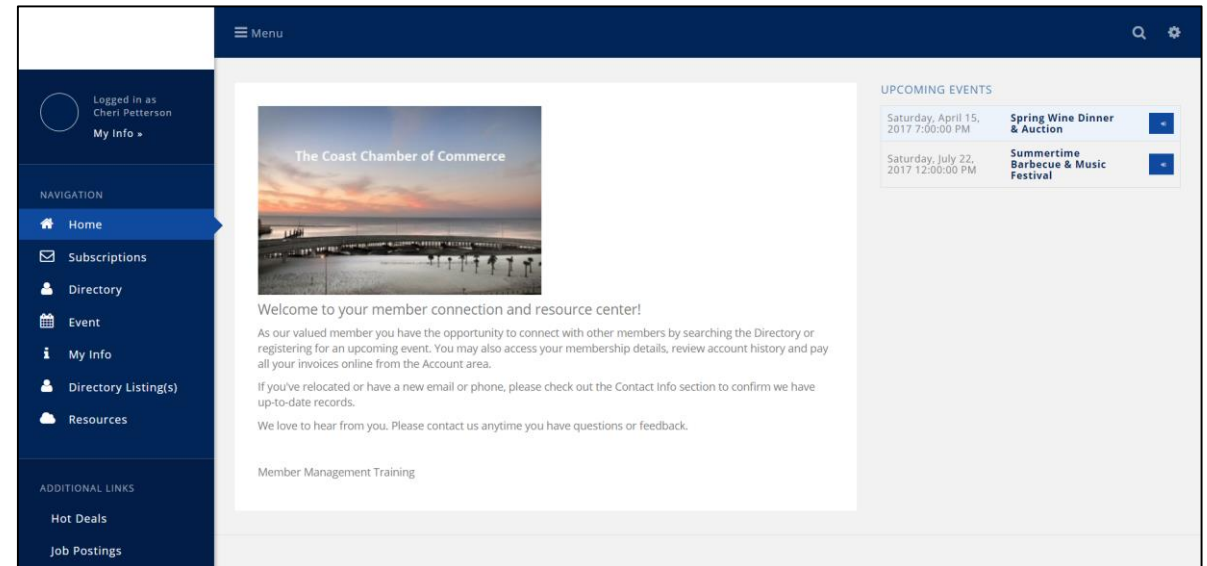
Where you will be able to manage all of your contacts and members, manage your events, generate and analyze reports, and work with the modules that you have selected



Overview – Member View - InfoHub

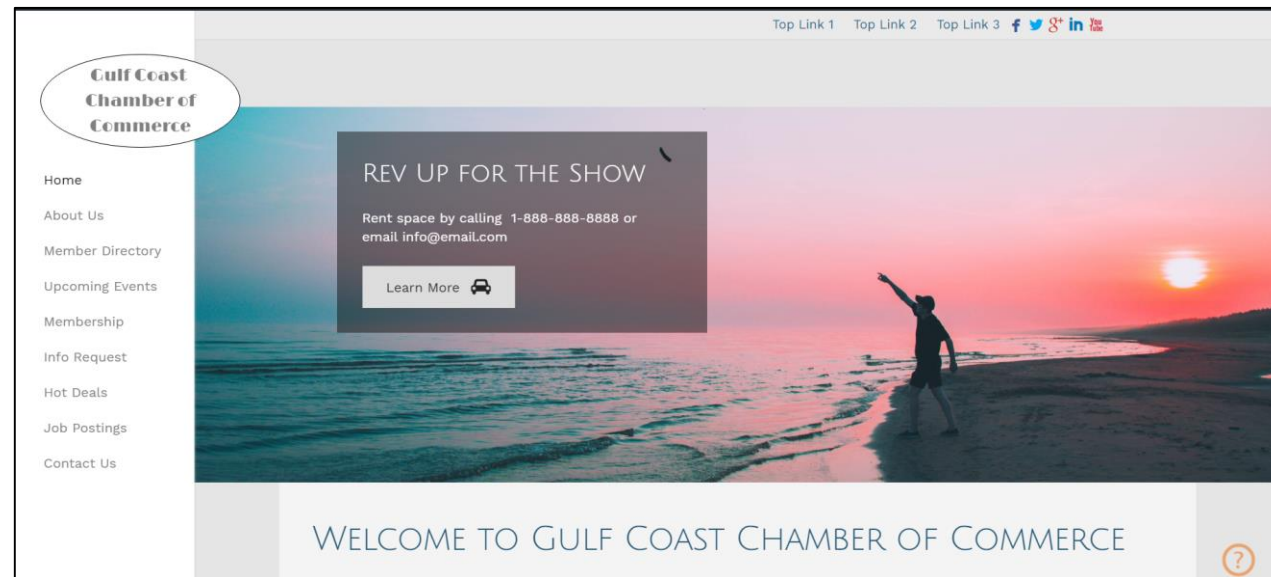
Members can

- Update own information (photos, directory listing, website, etc.)
- Manage their account and pay their bills
- Register for Events, enter New Events
- Enter Hot Deals, Member to Member Deals, & Job Postings...



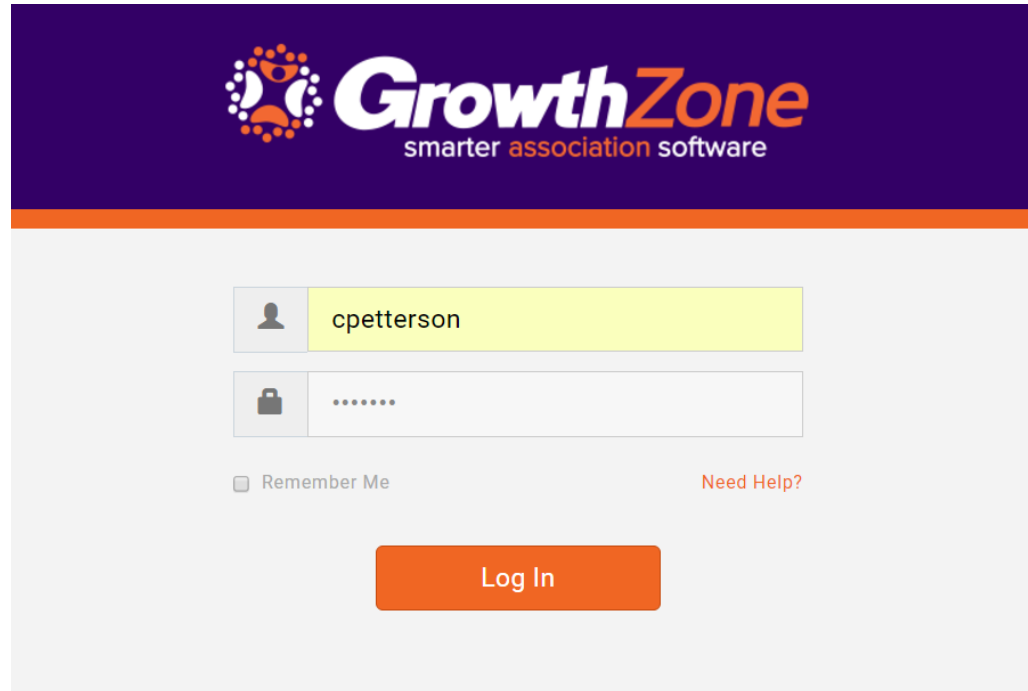
Overview – Website – Public View

We can design a website for you, or assist you in integrating to your existing site



Staff View - Database

Logging In: <https://growthzoneapp.com/login>



The image shows a login form for GrowthZone. At the top, there is a dark purple header with the GrowthZone logo and the text "GrowthZone smarter association software". Below the header, there are two input fields: the first is for the username, containing "cpetterson", and the second is for the password, containing six dots. Below the password field, there is a checkbox labeled "Remember Me" and a link labeled "Need Help?". At the bottom of the form, there is an orange "Log In" button.

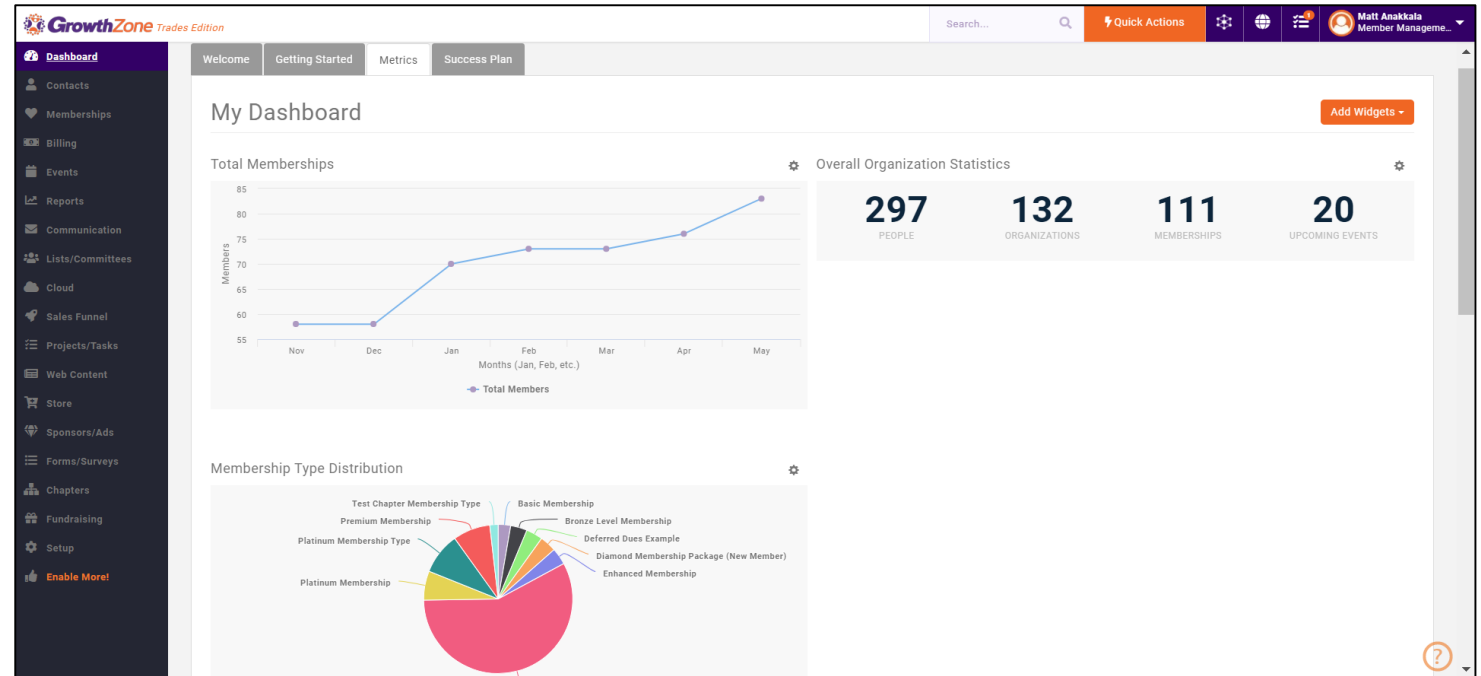
Staff View – Database Navigation

Header

Navigation Panel

WorkSpace

Common Functions



Search

- The Search option allows you to easily search for Contacts, Members or Events



Software Navigation – Quick Actions

Add Contacts...

Add Notes...

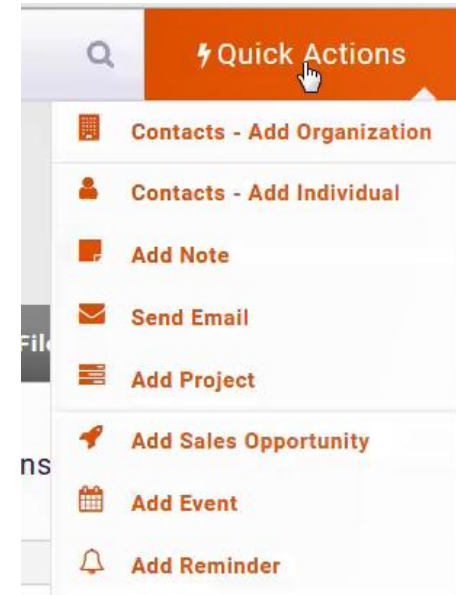
Send Emails...

Add Projects...

Add Sales Opportunity...

Add Events...



Add Reminders...





Software Navigation – Quick Actions



Example

Add Contacts - Organization



Add/Edit Organization  

Name

Phone, email, or website  

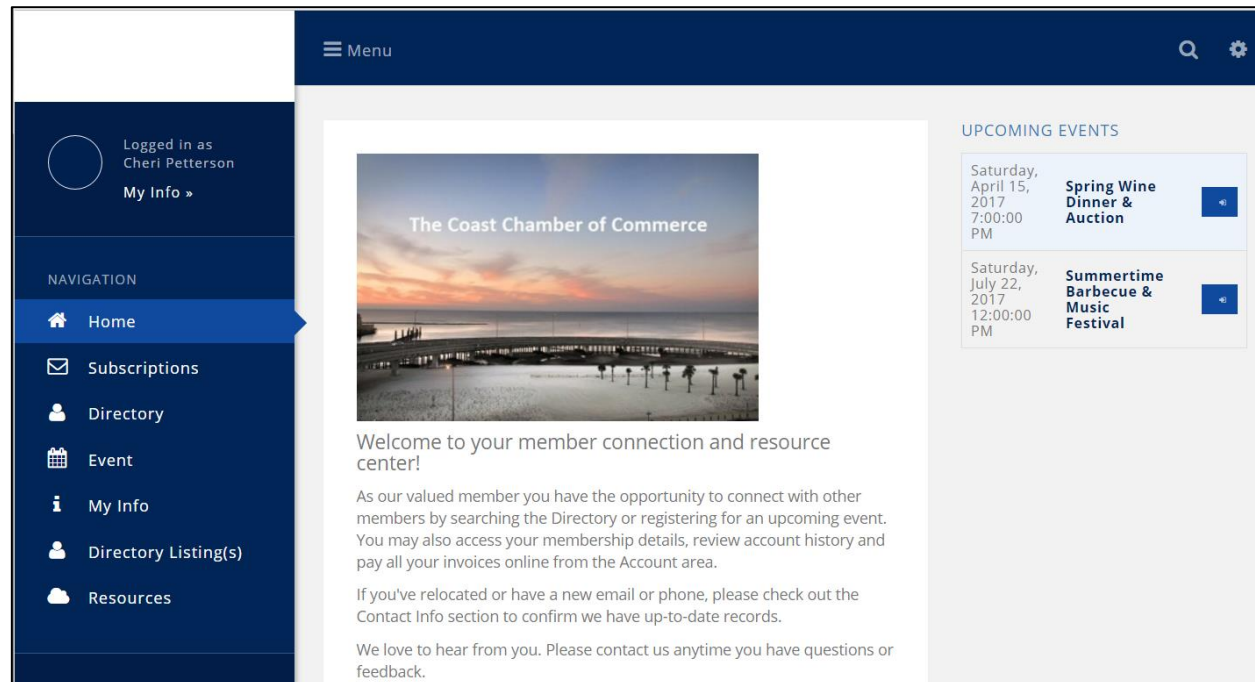
Address City State Province Postal Code Country Type  

Individuals (Optional)

First Name Last Name Title  

Software Navigation – Access to InfoHub

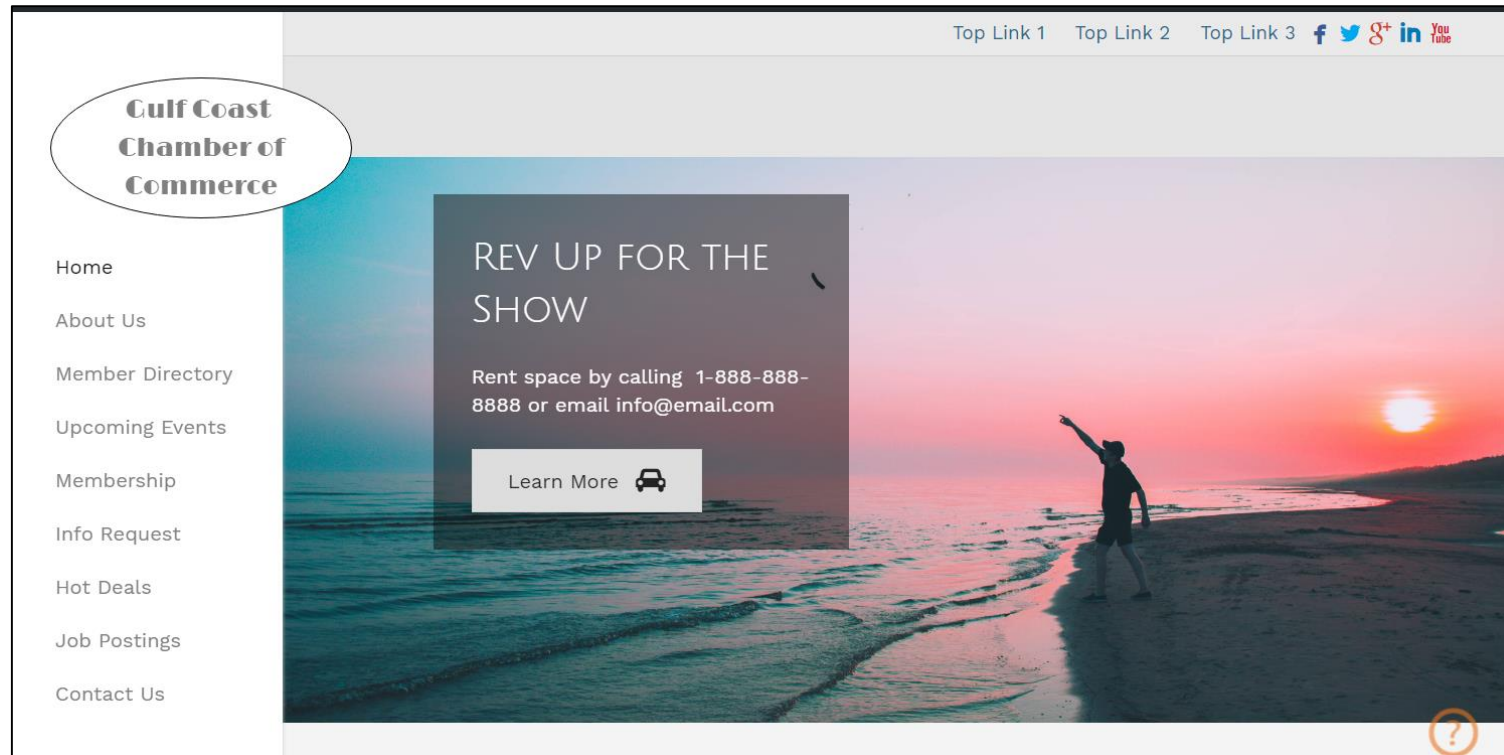
The logged on user can access the Info Hub by clicking



The screenshot displays the Info Hub interface. At the top, a dark blue header contains a 'Menu' icon, a search icon, and a settings icon. On the left, a dark blue sidebar lists navigation options: 'Home' (selected), 'Subscriptions', 'Directory', 'Event', 'My Info', 'Directory Listing(s)', and 'Resources'. The main content area features a header image for 'The Coast Chamber of Commerce' with a sunset background. Below the image, a welcome message reads: 'Welcome to your member connection and resource center!'. A paragraph follows: 'As our valued member you have the opportunity to connect with other members by searching the Directory or registering for an upcoming event. You may also access your membership details, review account history and pay all your invoices online from the Account area.' Another paragraph states: 'If you've relocated or have a new email or phone, please check out the Contact Info section to confirm we have up-to-date records.' The final paragraph says: 'We love to hear from you. Please contact us anytime you have questions or feedback.' On the right side, an 'UPCOMING EVENTS' section lists two events: 'Spring Wine Dinner & Auction' on Saturday, April 15, 2017, from 7:00:00 PM to 7:00:00 PM, and 'Summertime Barbecue & Music Festival' on Saturday, July 22, 2017, from 12:00:00 PM to 12:00:00 PM. Each event has a blue arrow icon to its right.

Software Navigation – Access to your Website GrowthZone smarter association software

You can view your website by clicking



Software Navigation – Assigned Tasks

Go to your list of Assigned tasks



Projects | **Tasks** | Task Calendar

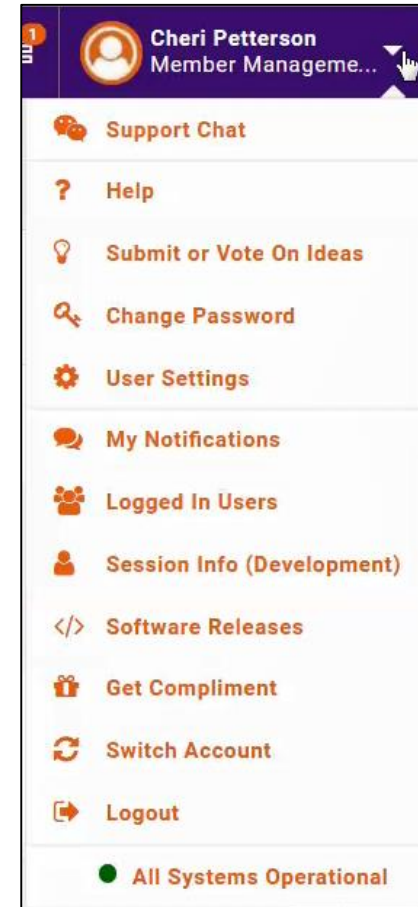
Search... Show only... Customize Results... + Add

Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
		Follow-up Reminder for Cheri Petterson	Normal		Adrian Chavez	Cheri Petterson	3/16/2017		0
		Follow-up Reminder for Cheri Petterson	Normal	Member Acquisition	Adrian Chavez	Cheri Petterson	3/17/2017		0
		Follow up with Claude Monet	Normal		Monet's Landscaping	Cheri Petterson	3/20/2017	3/16/2017	100

Software Navigation – Additional Options

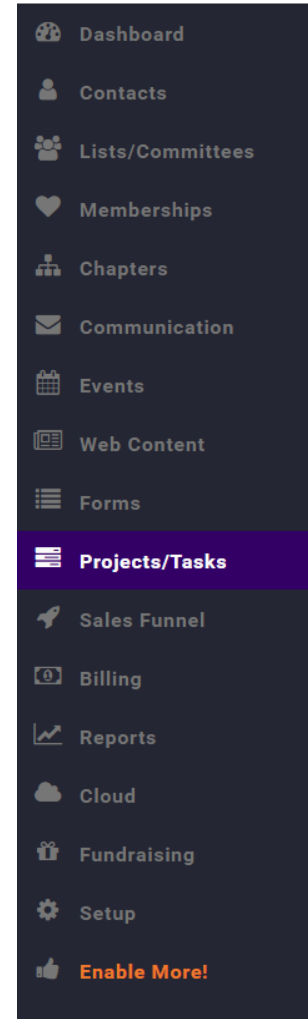
Additional options for the logged in staff member

- Chat
- Help
- Submit or Vote on Ideas
- Change Password
- User Settings
- My Notifications
- Logged In Users
- Software Releases
- Get Compliment
- Switch Account
- Logout
- System Status



Navigation Panel

The Navigation Panel allows you to easily navigate to the module you want to work with



When a module is selected in the Navigation Panel – details will be displayed in the work space

Search... Individuals Customize Results... ContactType:Individual x [Clear All] Add Organization

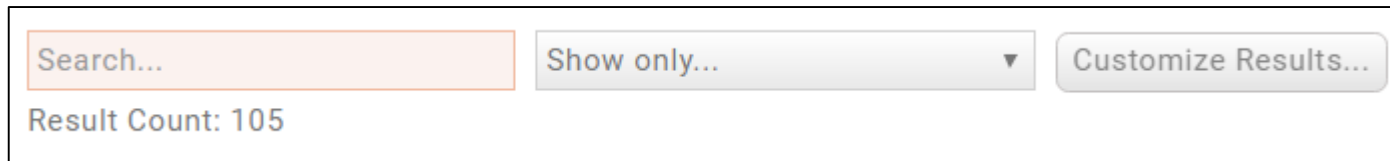
Result Count: 69

Type	Name	Balance	Primary Connection	Status	Primary Email	Primary Phone	City	State Province
	Cheri Petterson	\$337.00	Member Management Training	Non Member	cheri.petterson@micronetonline.com	218-546-5413		
	Johnny Ocean	\$0.00		Non Member		218-999-8722		
	Brandon Zinda	\$0.00	Member Management Training	Non Member	brandon.zinda@micronetonline.com			
	Susan Williams	\$0.00	Member Management Training	Non Member	susan.williams@micronetonline.com			
	Andrea Anderson	\$0.00	Member Management Training	Non Member	andrea.anderson@micronetonline.com			
	Michael Samuelson	\$0.00	Member Management Training	Non Member	michael.samuelson@micronetonline.com			
	James Petterson	\$0.00	Member Management Training	Non Member	lacherie_2000@yahoo.com	218-546-5413		
	Greg Lamar	\$0.00		Non Member				
	Wilma Lamar	\$0.00		Non Member				
	Joe Wolner	\$0.00	Cuyuna Golf Club	Non Member				

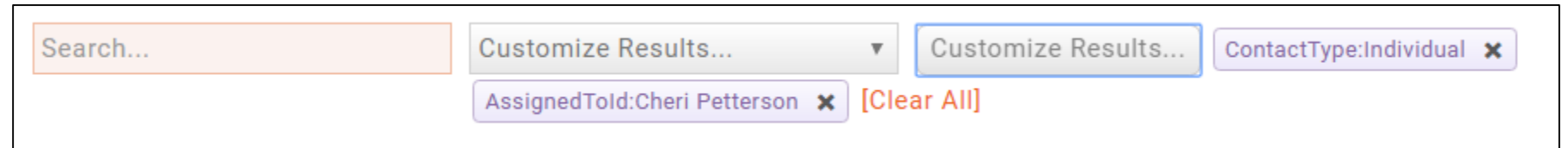
Common Functions

Search Function – search functions are available throughout the software

- Type ahead search
- Show Only
- Customize Results



Search... Show only... Customize Results...
Result Count: 105



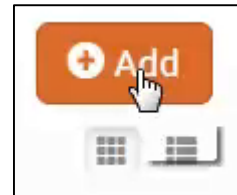
Search... Customize Results... Customize Results... ContactType:Individual ✕
AssignedToId:Cheri Petterson ✕ [Clear All]

Add

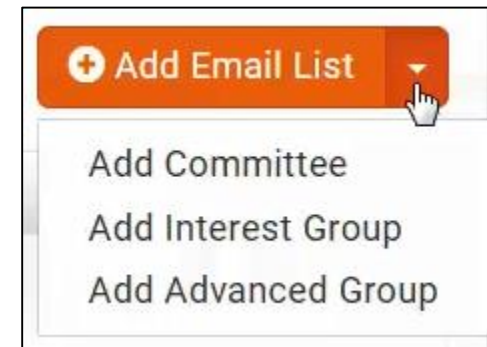
- the module that you are using will dictate the options available
- The most commonly used option will be displayed on the Add button



Contact



Membership



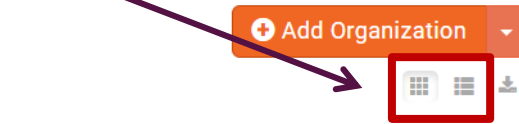
List/Committee

















Changing displays from Tile to List and vice versa

Search... Show only... Customize Results...

Result Count: 105

+ Add Organization



 Cheri Petterson Non-Member 218-546-5413	 Member Management Training Non-Member	 Johnny Ocean Non-Member 218-999-8722	 Brandon Zinda Non-Member
 Susan Williams Non-Member	 Andrea Anderson Non-Member	 Michael Samuelson Non-Member	 James Petterson Non-Member 218-546-5413
 Greg Lamar Non-Member	 Wilma Lamar Non-Member	 Cuyuna Golf Club Non-Member 2185647788	 Joe Wolner Non-Member
 Mary Johnson Non-Member	 Magnolis Steel Non-Member	 Diane Meyer Non-Member 1477 Bay Lake	 Crystal Nichols Non-Member

Common Functions

- Exporting List

Search... Show only... Customize Results...

Result Count: 105

+ Add Organization [Grid Icon] [List Icon] [Download Icon]

Cheri Petterson Non-Member 218-546-5413	\$337	Member Management Training Non-Member	Johnny Ocean Non-Member 218-999-8722	Brandon Zinda Non-Member
Susan Williams Non-Member		Andrea Anderson Non-Member	Michael Samuelson Non-Member	James Petterson Non-Member 218-546-5413
Greg Lamar Non-Member		Wilma Lamar Non-Member	Cuyuna Golf Club Non-Member 2185647788	Joe Wolner Non-Member
Mary Johnson Non-Member		Magnolis Steel Non-Member	Diane Meyer Non-Member 1477 Bay Lake	Crystal Nichols Non-Member

Common Functions

Edit 

Add 

Email 

Login to InfoHub (as user) 

Calendar 

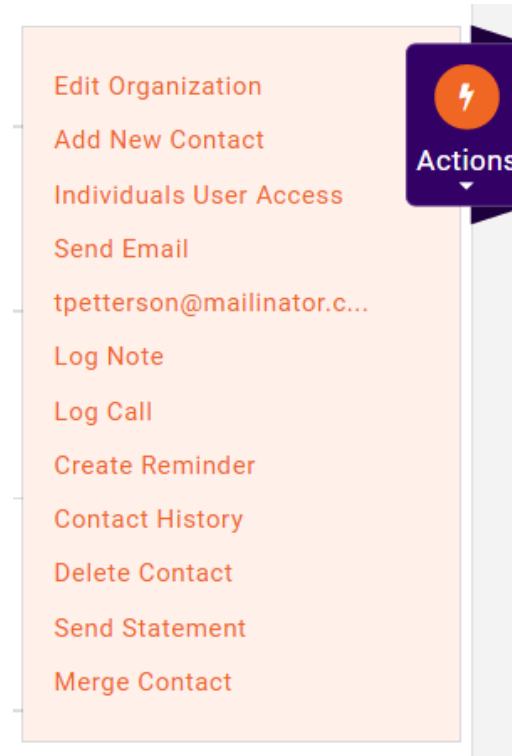
Communication Status 

Note – some of the action buttons discussed above may be hidden until you dwell over them

Common Functions

Clicking the Actions icon on a page will display a list of the command tasks performed in the module

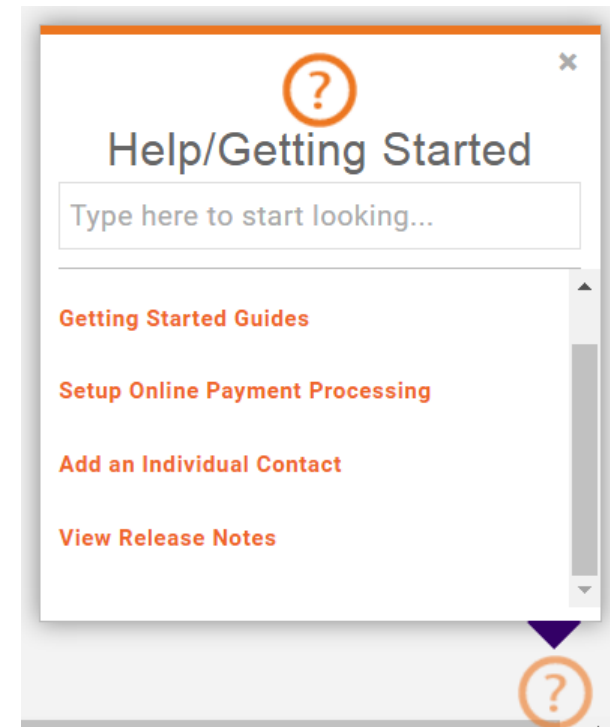
Tasks will vary per module



Help



- A numbered link on the help button indicates that there are new software developments for your review



GrowthZone Modules



Grow Faster – Acquire New Members



Lists/Committees

Communications

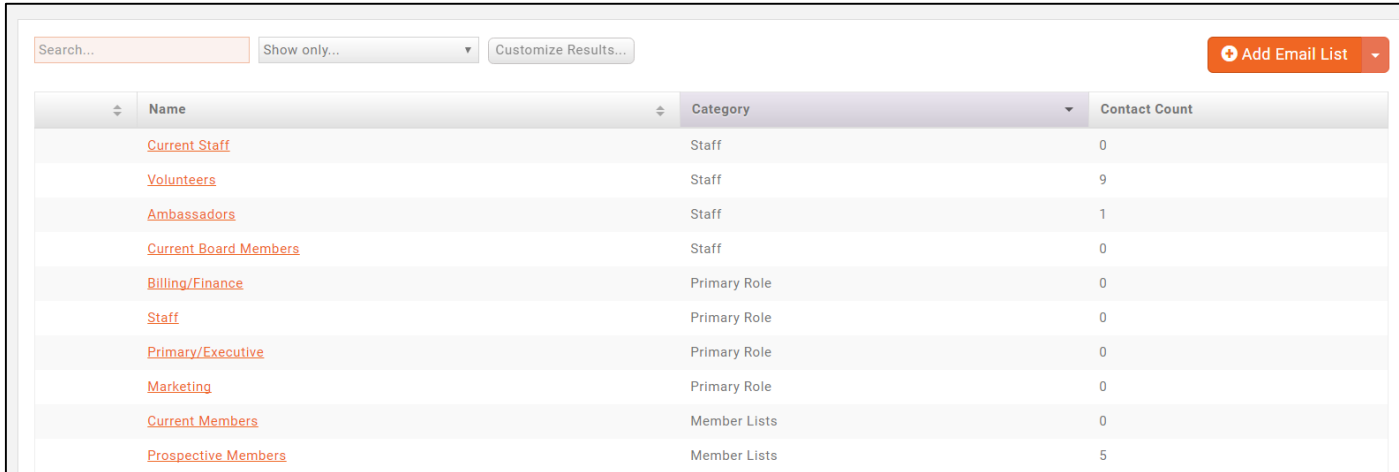
Contact Management

Membership Management

Chapters*

Member Recruitment*

The Lists/Committees module makes it easy to connect with and organize your members and individuals into groups for different types of communication



The screenshot shows a web interface for managing lists. At the top, there is a search bar, a 'Show only...' dropdown, a 'Customize Results...' button, and an 'Add Email List' button. Below this is a table with columns for Name, Category, and Contact Count. The table lists various groups such as Current Staff, Volunteers, and Current Board Members, along with their respective categories and contact counts.

Name	Category	Contact Count
Current Staff	Staff	0
Volunteers	Staff	9
Ambassadors	Staff	1
Current Board Members	Staff	0
Billing/Finance	Primary Role	0
Staff	Primary Role	0
Primary/Executive	Primary Role	0
Marketing	Primary Role	0
Current Members	Member Lists	0
Prospective Members	Member Lists	5

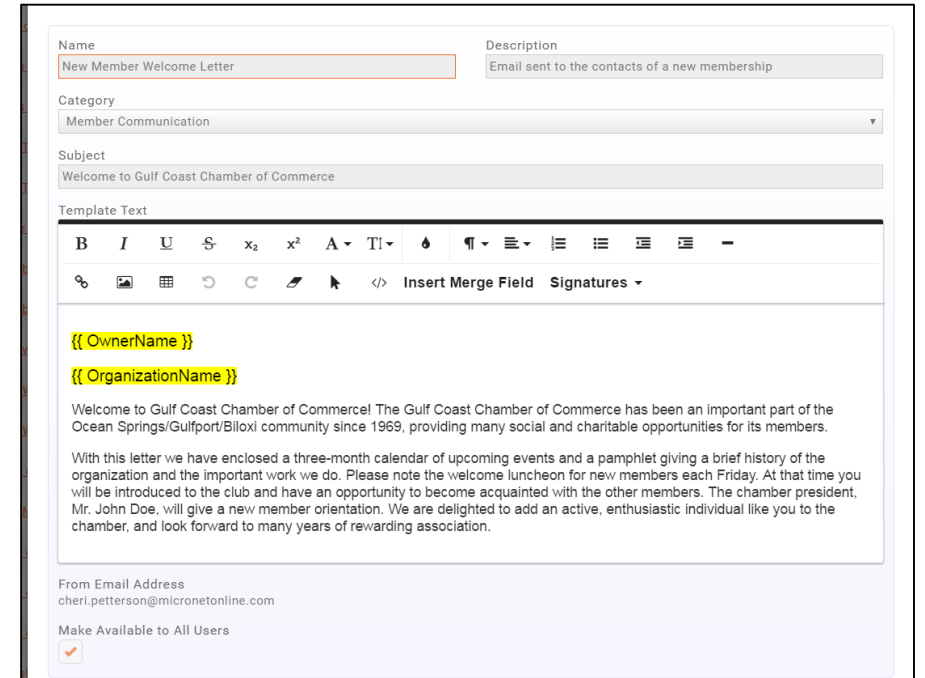
Templates

Categorization

Automated Messaging/Notifications

Individual/Group Emails

E-mail Receipt Tracking



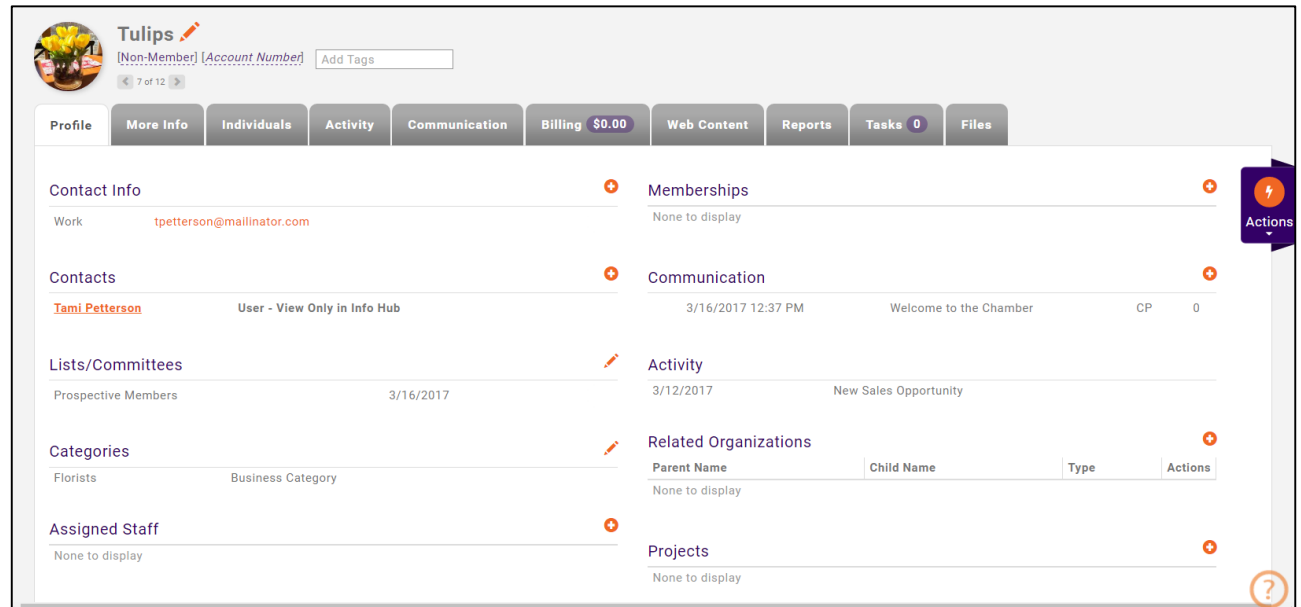
The screenshot shows the GrowthZone email template editor interface. It includes the following fields and options:

- Name:** New Member Welcome Letter
- Description:** Email sent to the contacts of a new membership
- Category:** Member Communication (dropdown menu)
- Subject:** Welcome to Gulf Coast Chamber of Commerce
- Template Text:** A rich text editor with a toolbar containing options for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), subscript (x₂), superscript (x²), text color (A), background color (T), font size, text alignment, list creation, and indenting. Below the toolbar, the text contains two merge fields: `{{ OwnerName }}` and `{{ OrganizationName }}`, both highlighted in yellow. The main text reads: "Welcome to Gulf Coast Chamber of Commerce! The Gulf Coast Chamber of Commerce has been an important part of the Ocean Springs/Gulfport/Biloxi community since 1969, providing many social and charitable opportunities for its members. With this letter we have enclosed a three-month calendar of upcoming events and a pamphlet giving a brief history of the organization and the important work we do. Please note the welcome luncheon for new members each Friday. At that time you will be introduced to the club and have an opportunity to become acquainted with the other members. The chamber president, Mr. John Doe, will give a new member orientation. We are delighted to add an active, enthusiastic individual like you to the chamber, and look forward to many years of rewarding association."
- From Email Address:** cherl.petterson@micronetonline.com
- Make Available to All Users:**

Contact Management

Contact Management allows you to easily track all important information about your contacts in one central location

Easily manage members activity, billing, and contact info in one central database



The screenshot displays the contact management interface for a contact named "Tulips". The interface includes a profile picture, name, and status ("Non-Member"). A navigation bar at the top contains tabs for Profile, More Info, Individuals, Activity, Communication, Billing (\$0.00), Web Content, Reports, Tasks (0), and Files. The main content area is divided into several sections:

- Contact Info:** Work email: tpetterson@mailinator.com
- Contacts:** Tami Petterson, User - View Only in Info Hub
- Lists/Committees:** Prospective Members, 3/16/2017
- Categories:** Florists, Business Category
- Assigned Staff:** None to display
- Memberships:** None to display
- Communication:** 3/16/2017 12:37 PM, Welcome to the Chamber, CP, 0
- Activity:** 3/12/2017, New Sales Opportunity
- Related Organizations:** Parent Name, Child Name, Type, Actions; None to display
- Projects:** None to display

An "Actions" menu is visible on the right side of the interface.

Membership Application Form

- Integrated to your web-site
- If configured automatic notification to staff when an application is received

MEMBERSHIP APPLICATION

Instructions

Thank you for your interest in our organization

Select An Option

General Membership \$1,200.00 Annually + \$25.00 Setup

Premium Membership \$2,000.00 Annually + \$25.00 Setup

Platinum Membership \$2,500.00 Annually + \$50.00 Platinum Membership Setup Fees

Enter Contact Information

First Name*

Last Name*

Member Recruitment*

Provides a clear view of the opportunities currently available, showing you the revenue that your organization can make in the months ahead

Add/Edit Sales Opportunity - Joe's Pizzeria

Organization: Joe's Pizzeria | Source: -- select a Source -- | Sales Person: Cheri Petterson

Sales Category: -- select a Sales Categ -- | One-Time Revenue: | Recurring Revenue: | Estimated Close Date:

Probability: | Stage: -- select a Stage -- | Status: Active | Won/Lost Date:

Delete | Cancel | **Done**

Member Recruitment*

Allows for tracking:

- One time revenue
- Recurring revenue
- Probability of Sale
- Timeline
- Communications
- Tasks

Sales Opportunity Communication Report Run Report

Sales Persons: None Selected | Sales Statuses: None Selected | Sales Stages: None Selected

Sales Source: None Selected | Sales Categories: None Selected

Criteria / Filters: +

Display Options

Fields to Display: Days since contact, Prospect Name, Sales Person | Summarize By: || | Display Mode: Detail

Results

Sales Person	Prospect Name	Days since contact
Cheri Petterson	Joe's Pizzeria	0
Cheri Petterson	The Ski Hill	0
Count\Average\Totals	2	0

Results

Contact Name	Default Email	Default Phone	Sales Person	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Timeline	Timeline Date
Joe's Pizzeria	jranard@mailinator.com		Cheri Petterson	3/31/2017	\$50.00	\$1,200.00	\$1,250.00	Prospect		Initial Contact	3/17/2017	
The Ski Hill			Cheri Petterson	3/29/2017	\$50.00	\$2,000.00	\$2,050.00	Active		Initial Contact		
Count\Average\Totals	2				\$100.00	\$3,200.00	\$3,300.00					

The Chapters module allows you to tie membership applications, calendars, communications to chapter level

Chapters	
Chapter Name	Parent Chapter
MN Veterinary Association Chapter	Cheri's Sandboxes
ND Vet Association	Cheri's Sandboxes
SD Veterinary Association	Cheri's Sandboxes

Retain & Engage Your Members

Events Management

Info Hub

Events Expo*

Sponsors/Ads*

Web Content*

Fundraising*

On-line Store*

Continuing Education*

The Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices

SPRING WINE DINNER & AUCTION

[Back to Calendar](#)

i The Arboretum

🕒 Saturday, April 15, 2017 (7:00 PM - 11:00 PM)
Hors D'Oeuvres 7pm
Dinner 8pm
Dance 10pm

📞 218-546-5413

PRICING Four Course meal with wine selection \$75.00 per person. 20% discount applies to registrations received by March 8th.

📱 [f](#) [in](#) [t](#) [p](#)

Event Details

Join us at The Arboretum....
Annual Spring Wine Dinner & Auction

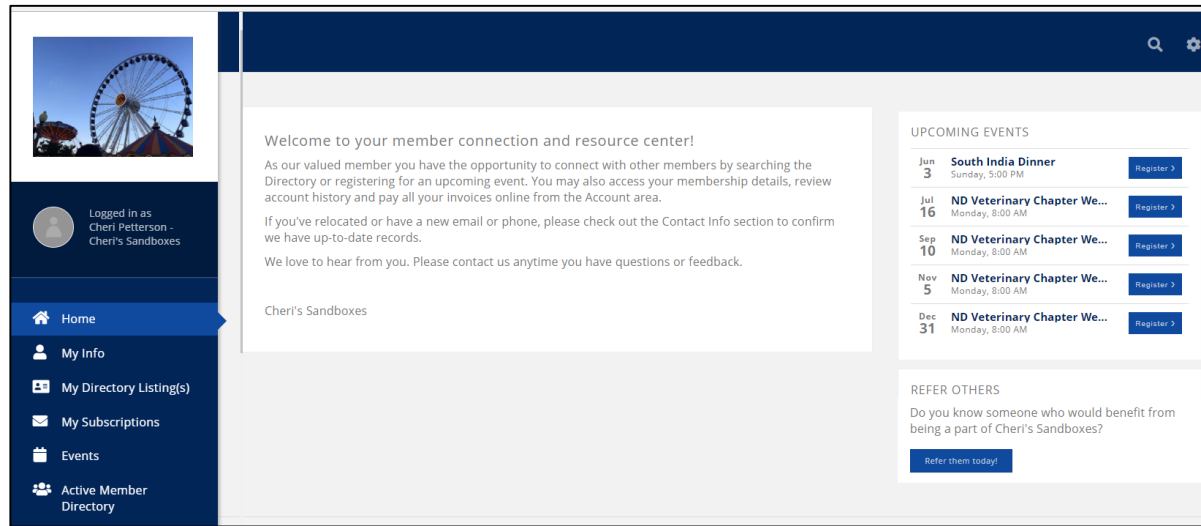


Additional Information

Event Contact:
Cheri Petterson
218-546-5413

Powered By MemberZone

- Members can update your own information (photos, directory listing, website, etc.)
- Manage their account and pay their bills
- Register for Events, enter New Events
- Enter Hot Deals, Member to Member Deals, & Job Postings...

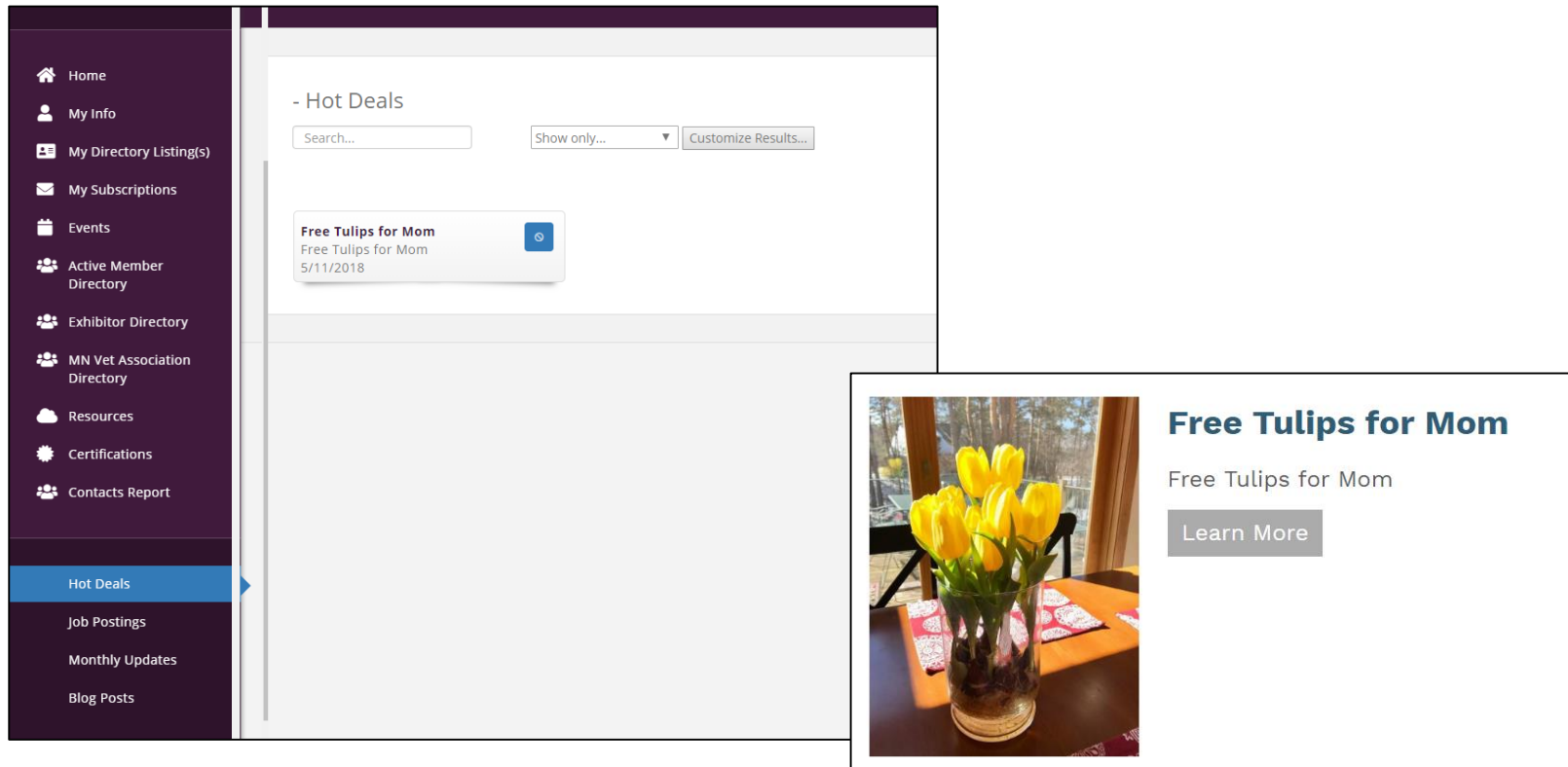


The screenshot displays the member portal interface. On the left is a dark blue navigation sidebar with a profile picture of a Ferris wheel and the text "Logged in as Cheri Petterson - Cheri's Sandboxes". The sidebar menu includes: Home, My Info, My Directory Listing(s), My Subscriptions, Events, and Active Member Directory. The main content area has a dark blue header with search and settings icons. Below the header is a white welcome message: "Welcome to your member connection and resource center! As our valued member you have the opportunity to connect with other members by searching the Directory or registering for an upcoming event. You may also access your membership details, review account history and pay all your invoices online from the Account area. If you've relocated or have a new email or phone, please check out the Contact Info section to confirm we have up-to-date records. We love to hear from you. Please contact us anytime you have questions or feedback." Below this is the user's name "Cheri's Sandboxes". To the right is a section titled "UPCOMING EVENTS" with a table of events and a "REFER OTHERS" section with a "Refer them today!" button.

UPCOMING EVENTS		
Jun 3	South India Dinner Sunday, 5:00 PM	Register >
Jul 16	ND Veterinary Chapter We... Monday, 8:00 AM	Register >
Sep 10	ND Veterinary Chapter We... Monday, 8:00 AM	Register >
Nov 5	ND Veterinary Chapter We... Monday, 8:00 AM	Register >
Dec 31	ND Veterinary Chapter We... Monday, 8:00 AM	Register >

REFER OTHERS
Do you know someone who would benefit from being a part of Cheri's Sandboxes?
[Refer them today!](#)

Provide additional benefits to members using hot deals, job postings and member to member hot deals



Home

My Info

My Directory Listing(s)

My Subscriptions

Events

Active Member Directory

Exhibitor Directory

MN Vet Association Directory

Resources

Certifications

Contacts Report

Hot Deals

Job Postings

Monthly Updates

Blog Posts

- Hot Deals

Search...

Show only...

Customize Results...

Free Tulips for Mom

Free Tulips for Mom

5/11/2018

Free Tulips for Mom

Free Tulips for Mom

Learn More

With the Expo module, you can add sessions to your events, as well as manage event exhibitors

Annual Trade Show Sessions

[Back to Event](#) [Register for Event](#)



Patient Advocacy

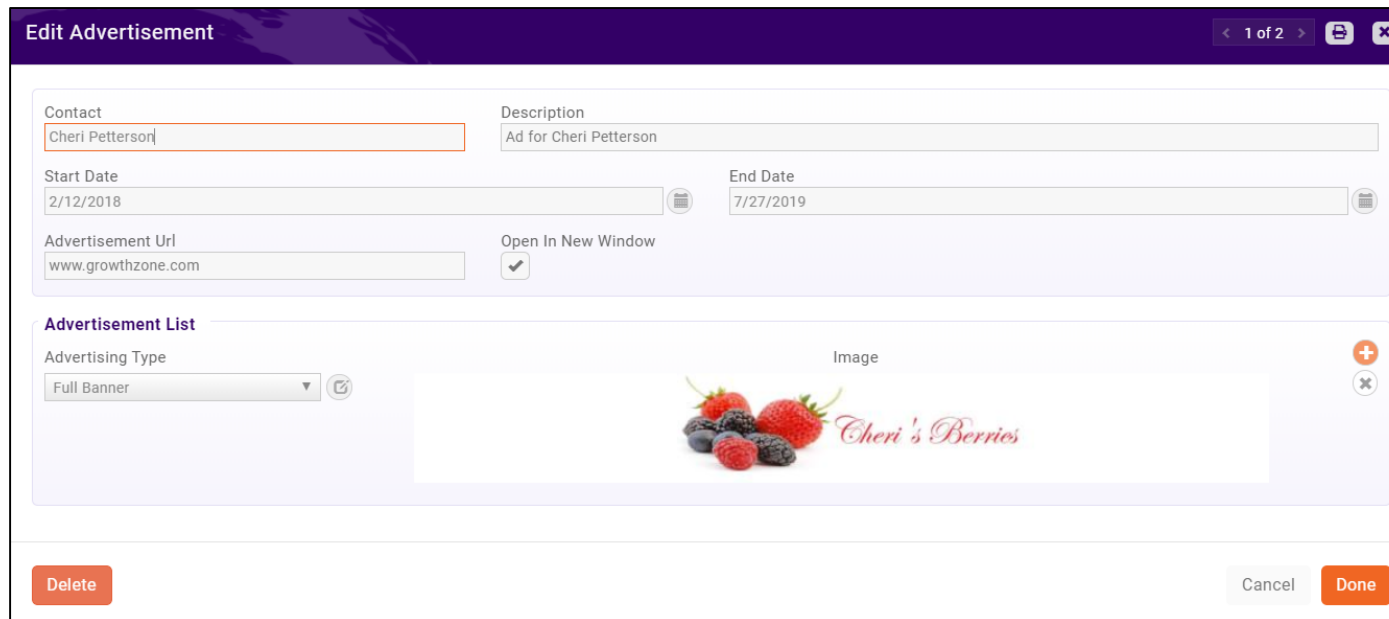
Date: Breakout Session 10am - 11am
Location: Ballroom B

Speakers

Joe Lyons - Patient Advocate - LLC Hospital
Joe has been a leader in the healthcare industry for over 35 years. His career began in the clinical areas that include medical/surgical, emergency department, medical and respiratory intensive care. On the business side of healthcare, Joe has expertise in the area of Risk Management and Case Management in the areas of catastrophic case management, long term care and workers compensation. Through each of these experiences, Anne has been an advocate for the patient and family which has allowed her to have a broad scope of the practice and an understanding of how and why the area of professional patient advocacy is emerging as a key tool to engage patients to be active participants in their health and healthcare as the industry transitions to a patient and family centered healthcare system

The Sponsors/Ads module provides options for offering advertising opportunities to your members

This will give them additional exposure, as well as bring in additional revenue to your association



The screenshot shows the 'Edit Advertisement' interface. At the top, there is a title bar with 'Edit Advertisement' and navigation icons. The form is divided into several sections:

- Contact:** A text field containing 'Cheri Petterson'.
- Description:** A text field containing 'Ad for Cheri Petterson'.
- Start Date:** A date picker set to '2/12/2018'.
- End Date:** A date picker set to '7/27/2019'.
- Advertisement Url:** A text field containing 'www.growthzone.com'.
- Open In New Window:** A checked checkbox.
- Advertising Type:** A dropdown menu set to 'Full Banner'.
- Image:** A preview area showing a banner with a photo of raspberries and the text 'Cheri's Berries'.

At the bottom of the form, there are three buttons: 'Delete', 'Cancel', and 'Done'.

Help the community with fundraising campaigns and track donations

Special Olympics


Summary
Donation Activity
Recurring
Donors
Donation Setup

General Information

Campaign Name	Special Olympics
Campaign Status	Active
Start Date	3/6/2017
End Date	
Description	Support Special Olympics
Primary Contact	Brandon Zinda

Donation Statistics

Number of Donations	2
Goal Amount	
Current Amount Paid	
Remaining to Goal	




Special Olympics

Summary
Donation Activity
Recurring
Donors
Donation Setup

Customize Results...
Customize Results...
Amount: between 100 and 500 ✕
[Clear All]

Contact	Description	Total	Paid	Type	Purchase Date	Actions
Nora Breiby	Special Olympics	\$100.00	\$0.00	One Time Donation	6/2/2017	
Bikes Bikes Bikes	Special Olympics	\$100.00	\$0.00	One Time Donation	6/1/2017	
Matt Anakkala	Special Olympics	\$100.00	\$0.00	One Time Donation	5/11/2017	
Henry James	Special Olympics	\$100.00	\$0.00	One Time Donation	5/8/2017	
Cherle Swanson	Special Olympics	\$100.00	\$0.00	One Time Donation	4/27/2017	
Cheri Petterson	Special Olympics	\$100.00	\$0.00	One Time Donation	4/18/2017	
Jerry Mannard	Special Olympics	\$100.00	\$100.00	One Time Donation	4/7/2017	
Daphne Duck	Special Olympics	\$100.00	\$0.00	One Time Donation	4/7/2017	
Joan Jett	Special Olympics	\$100.00	\$0.00	One Time Donation	3/26/2017	
Cheri Petterson	Special Olympics	\$500.00	\$500.00	One Time Donation	3/17/2017	






The Store Module is a module that allows the association to sell additional resources/products to members

The integrated into your GrowthZone Software, makes selling and processing orders as simple as possible

CHERI'S SANDBOX STORE

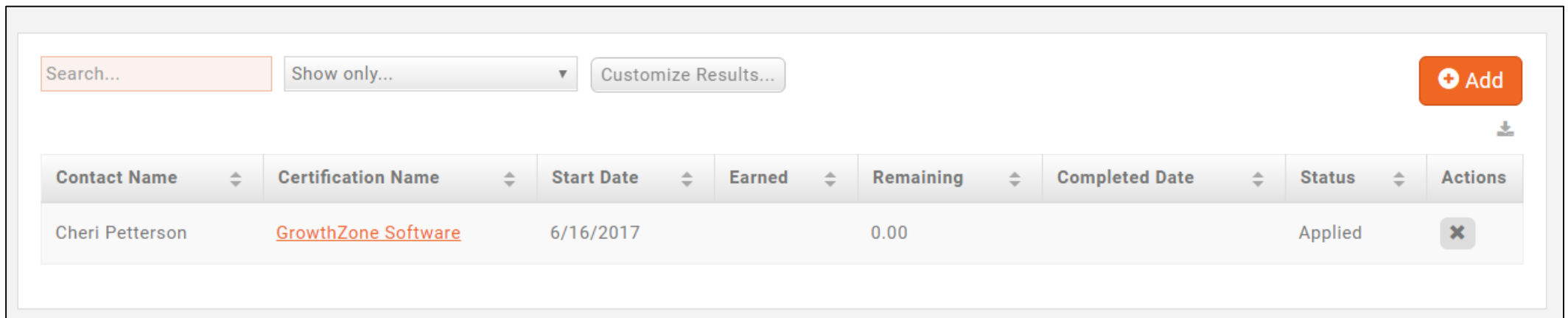
Welcome to our Store.... find all of your lakes logo gear at the tip of your fingers

 <p>LOGO T-SHIRT</p> <p>\$ 40.00</p> <p>Details</p> <p>Add To Cart</p>	 <p>LOGO BACKPACK</p> <p>\$ 50.00</p> <p>Details</p> <p>Add To Cart</p>	 <p>LOGO BASEBALL CAPS</p> <p>\$ 25.00</p> <p>Details</p> <p>Add To Cart</p>
---	--	---

Continuing Education*

The Continuing Education module allows you to track certifications/continuing education events for your members

- Track hours
- Track Requirements
- Provide Certificates



The screenshot shows a web interface for tracking continuing education. At the top, there is a search bar, a dropdown menu for 'Show only...', and a 'Customize Results...' button. On the right side, there is an orange '+ Add' button and a download icon. Below these elements is a table with the following columns: Contact Name, Certification Name, Start Date, Earned, Remaining, Completed Date, Status, and Actions. A single row of data is visible, showing a member named Cheri Petterson who has completed the 'GrowthZone Software' certification on 6/16/2017, with 0.00 hours earned and remaining, and a status of 'Applied'. An 'X' icon in the Actions column indicates that the certification can be removed.

Contact Name	Certification Name	Start Date	Earned	Remaining	Completed Date	Status	Actions
Cheri Petterson	GrowthZone Software	6/16/2017		0.00		Applied	X

Do More with Less Time

Billing

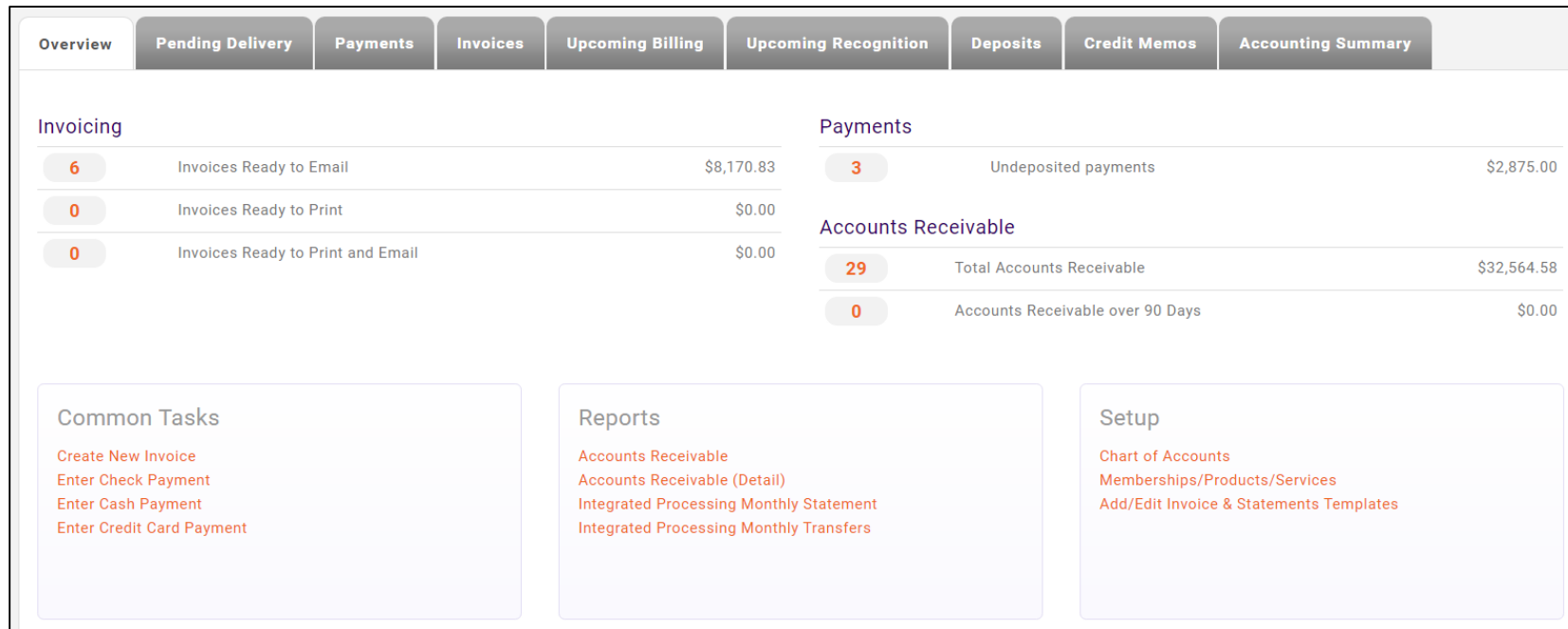
Reporting

Forms*

Project Management*

Marketing Automation*

- Easy creating of invoices
- Accepting Payments
- GrowthZone Pay



The screenshot shows the Billing dashboard with a navigation bar at the top containing tabs: Overview, Pending Delivery, Payments, Invoices, Upcoming Billing, Upcoming Recognition, Deposits, Credit Memos, and Accounting Summary. The main content area is divided into three sections: Invoicing, Payments, and Accounts Receivable. Below these are three boxes for Common Tasks, Reports, and Setup.

Invoicing	
6	Invoices Ready to Email \$8,170.83
0	Invoices Ready to Print \$0.00
0	Invoices Ready to Print and Email \$0.00

Payments	
3	Undeposited payments \$2,875.00

Accounts Receivable	
29	Total Accounts Receivable \$32,564.58
0	Accounts Receivable over 90 Days \$0.00

Common Tasks

- Create New Invoice
- Enter Check Payment
- Enter Cash Payment
- Enter Credit Card Payment

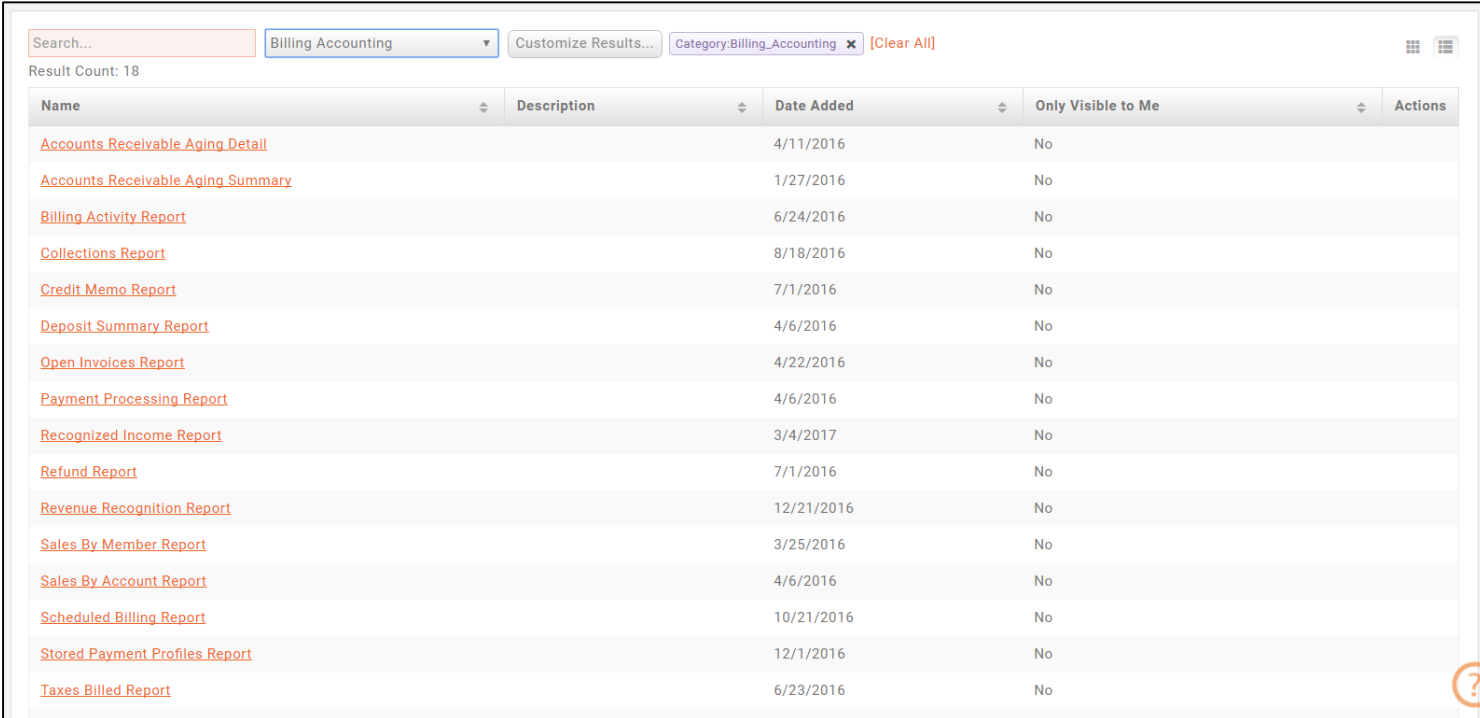
Reports

- Accounts Receivable
- Accounts Receivable (Detail)
- Integrated Processing Monthly Statement
- Integrated Processing Monthly Transfers

Setup

- Chart of Accounts
- Memberships/Products/Services
- Add/Edit Invoice & Statements Templates

Wide variety of reports for you to analyze all aspects of your organization
Customizable to meet your needs

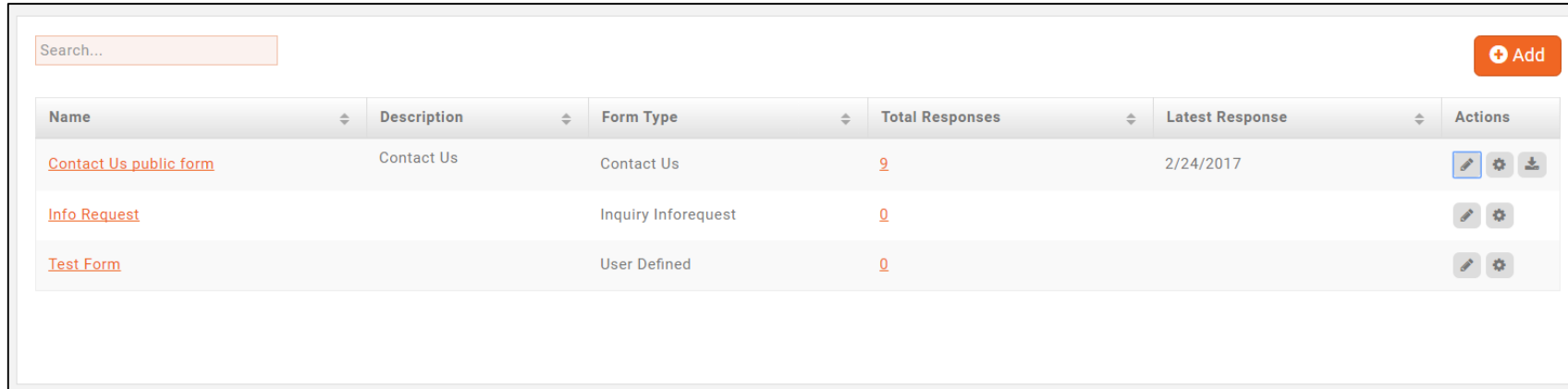


Search... Billing Accounting Customize Results... Category: Billing_Accounting x [Clear All]








Result Count: 18

Name	Description	Date Added	Only Visible to Me	Actions
Accounts Receivable Aging Detail		4/11/2016	No	
Accounts Receivable Aging Summary		1/27/2016	No	
Billing Activity Report		6/24/2016	No	
Collections Report		8/18/2016	No	
Credit Memo Report		7/1/2016	No	
Deposit Summary Report		4/6/2016	No	
Open Invoices Report		4/22/2016	No	
Payment Processing Report		4/6/2016	No	
Recognized Income Report		3/4/2017	No	
Refund Report		7/1/2016	No	
Revenue Recognition Report		12/21/2016	No	
Sales By Member Report		3/25/2016	No	
Sales By Account Report		4/6/2016	No	
Scheduled Billing Report		10/21/2016	No	
Stored Payment Profiles Report		12/1/2016	No	
Taxes Billed Report		6/23/2016	No	

Use the Form Builder/Survey tool to create online forms or insert links into emails to encourage and track responses



The screenshot shows a web interface for managing forms. At the top left is a search bar labeled "Search...". At the top right is an orange "Add" button with a plus icon. Below these is a table with the following columns: Name, Description, Form Type, Total Responses, Latest Response, and Actions. The table contains three rows of data.

Name	Description	Form Type	Total Responses	Latest Response	Actions
Contact Us public form	Contact Us	Contact Us	9	2/24/2017	  
Info Request		Inquiry Inforequest	0		 
Test Form		User Defined	0		 

Project Management*

Streamline processes for membership acquisition, membership on-boarding, event planning...

New Member On-boarding Add Tags

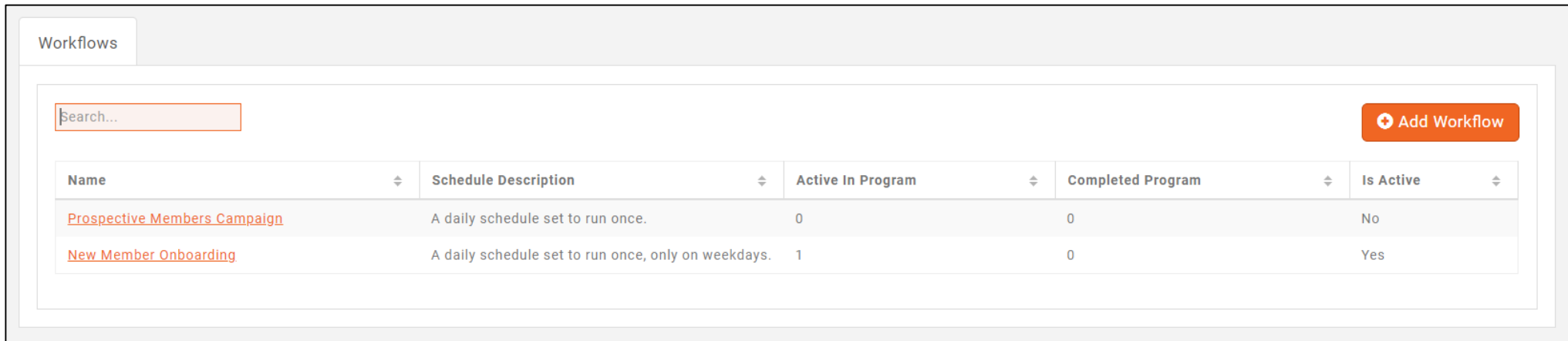
Summary Data Economic Development **Tasks** Files Communication

+ Add ⚡ Actions

Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
Welcome Letter	Important	Members On-boarding		Brandon Zinda			0
Ambassador Visit	Important	Members On-boarding		Sheryl Rassler			0
Welcome Email	Important	Members On-boarding		Brandon Zinda			0

Marketing Automation*

- The GrowthZone Marketing Automation module provides the functionality to set up automated workflows designed specifically around varying communication goals.
- For example, you may want to have a work flow for new prospects, or perhaps a drip campaign for new members. A workflow can be tied to a campaign list, that will then allow you to automatically send targeted information to key individuals and groups.



Name	Schedule Description	Active In Program	Completed Program	Is Active
Prospective Members Campaign	A daily schedule set to run once.	0	0	No
New Member Onboarding	A daily schedule set to run once, only on weekdays.	1	0	Yes

Questions?

