

# GrowthZone Training

Minneapolis April 2018

# Introductions

- Your Name and Role
- Name of your Association/Chamber
- Scale of 1 – 10 what you know about GrowthZone
- If you could have any business... what would it be

# Agenda

- System Navigation Initial GrowthZone setup
- Setting up Staff/Members User Permissions & Profiles
- Setting up Communications
- Initial Billing Setup
- Working with Contacts
- Setting up Membership Types & Membership Application Form
- Managing Members
- Working with Web Content Introduction to Info Hub
- Analyzing Membership Reports

# Overview

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

# Overview

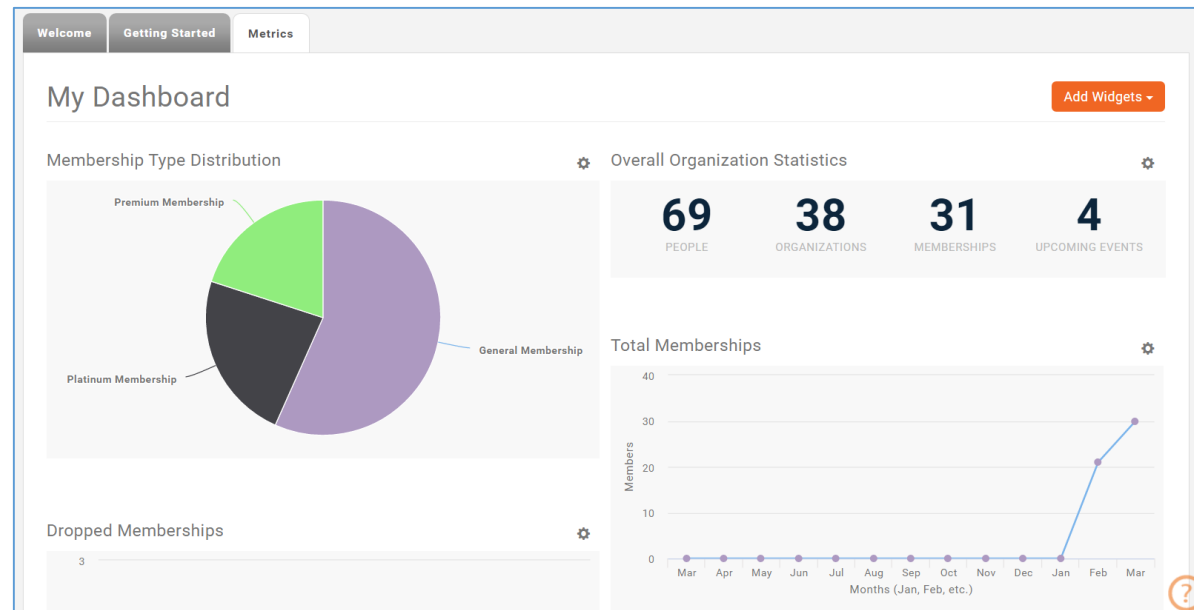
Easy to use, and designed to manage all the day-to-day operations of your organization

## Three Different Views

- Staff/Database View
- Member View
- Public View

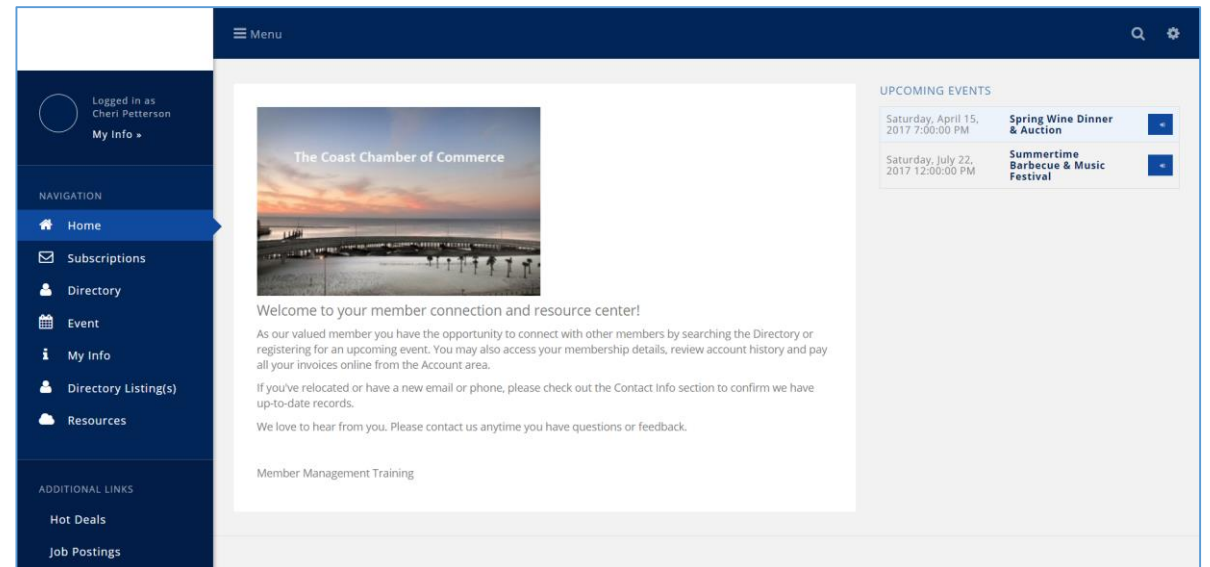
# Overview – Staff View - Database

- 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



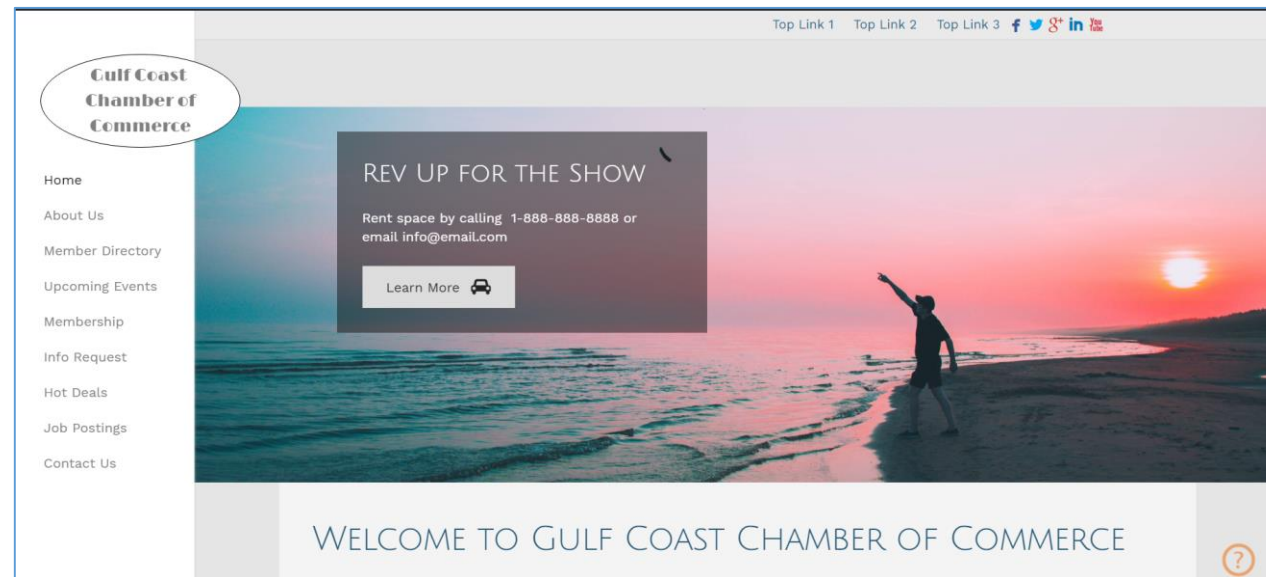
# Overview – Member View - InfoHub

- 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

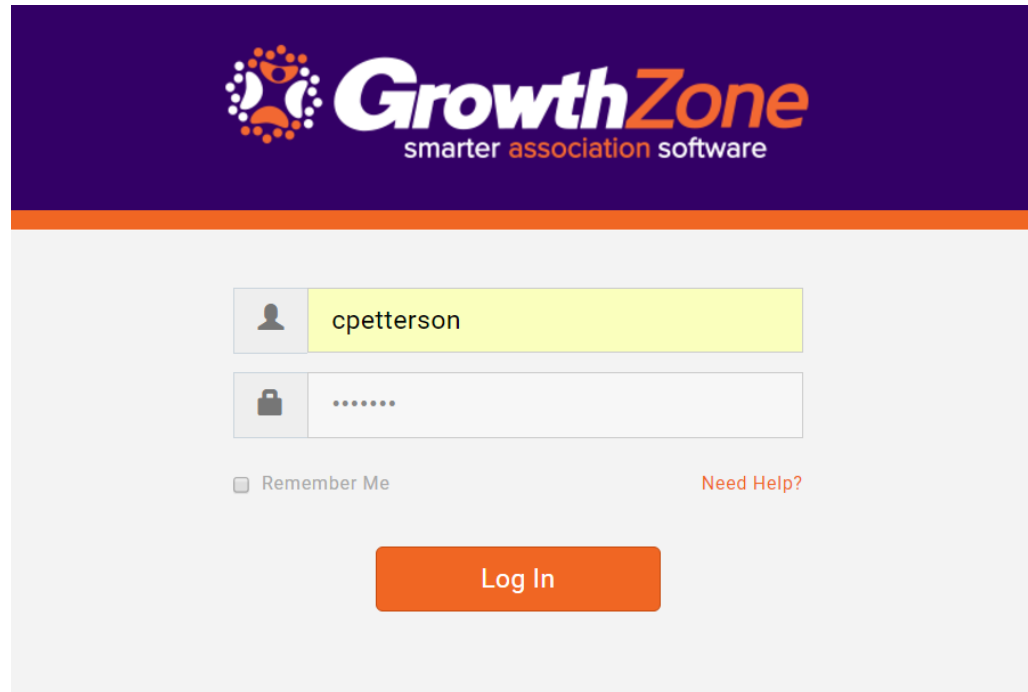
- We can design a website for you, or assist you in integrating to your existing site





# Staff View - Database

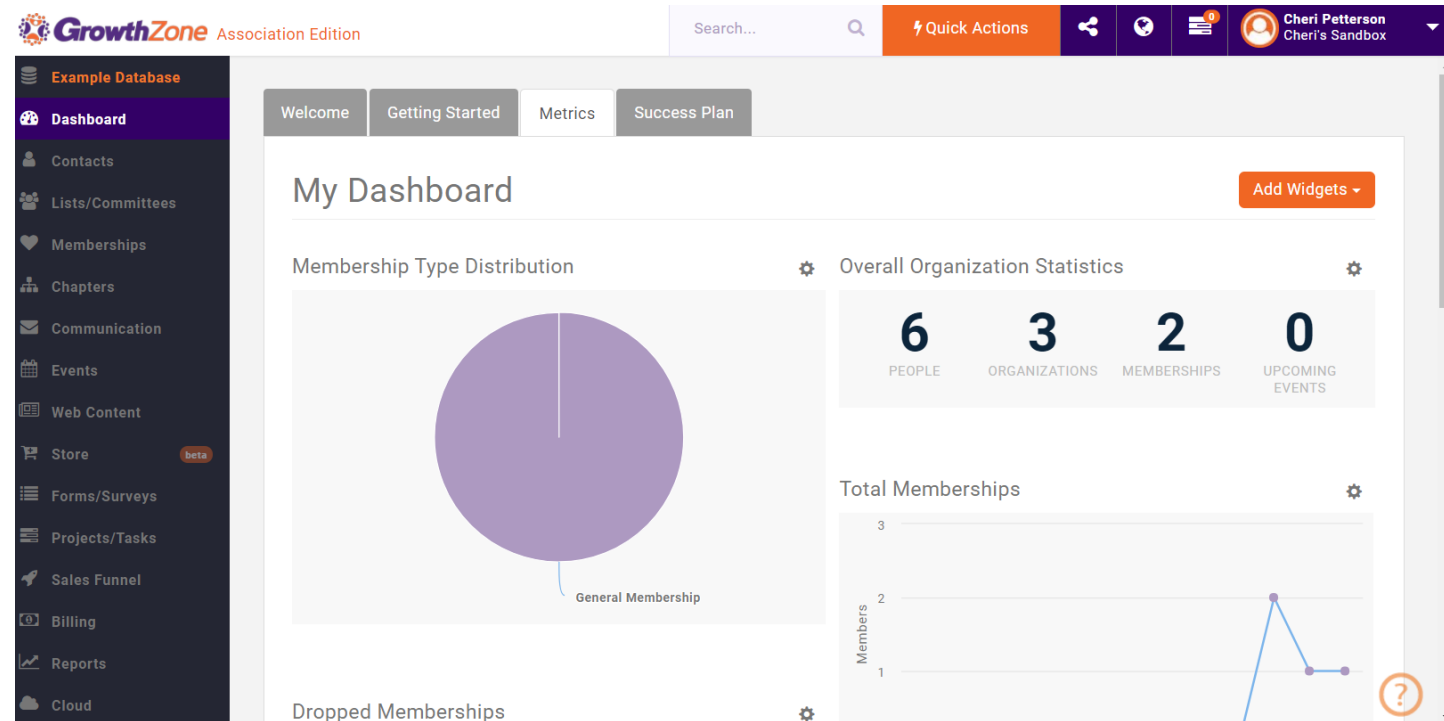
- Logging In: <https://growthzoneapp.com/login>



The screenshot shows the login interface for GrowthZone. At the top, there is a dark purple header with the GrowthZone logo and the tagline "smarter association software". Below the header is a light gray login form. The form contains two input fields: the first is for the username, with "cpetterson" entered, and the second is for the password, with "....." entered. Below the password field, there is a checkbox labeled "Remember Me" and a link labeled "Need Help?". At the bottom of the form is a prominent orange "Log In" button.

# Staff View – Database Navigation

- Header
- Navigation Panel
- WorkSpace
- Common Functions



# Software Navigation - Header

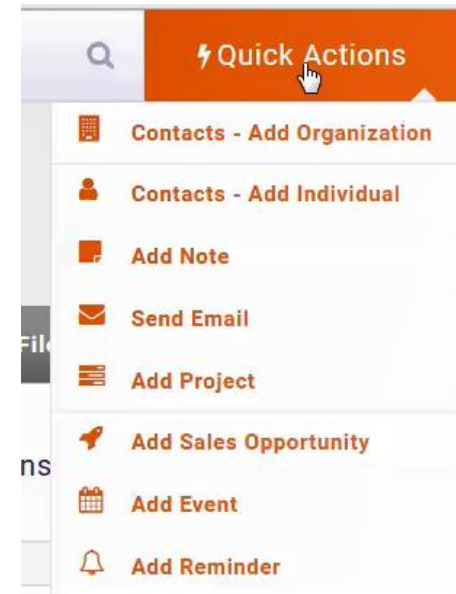
## Search

- 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   

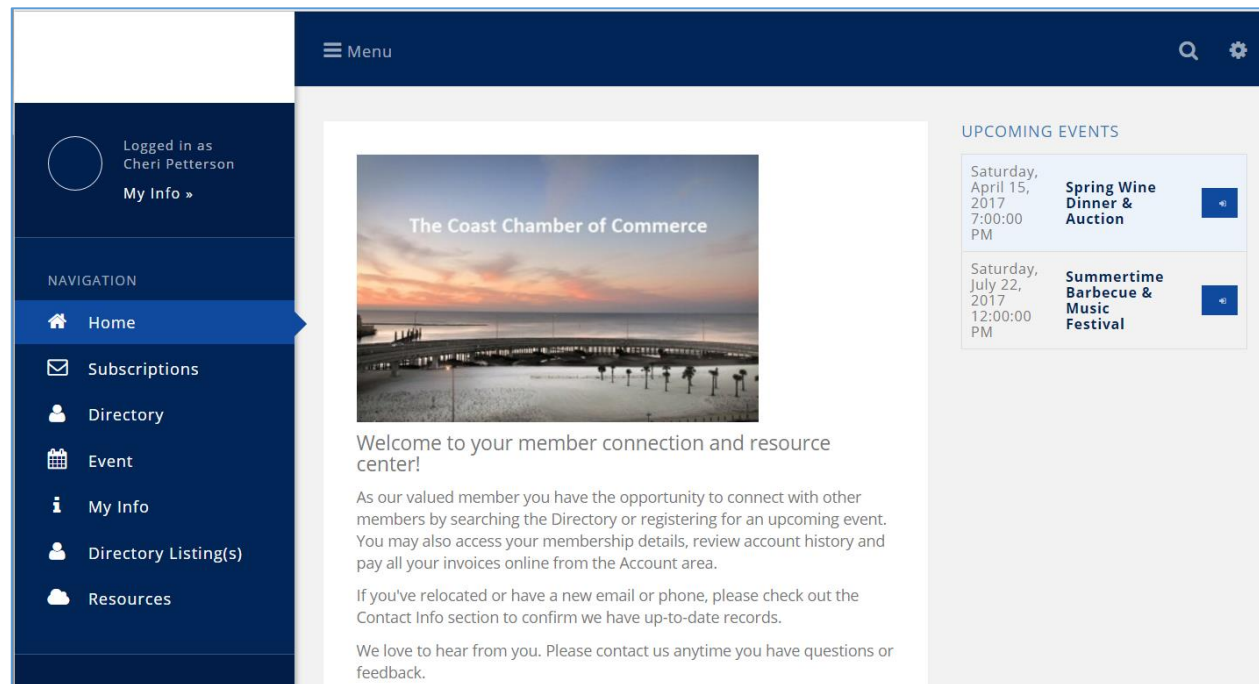
Address  City  State Province  Postal Code  Country  Type   

**Individuals (Optional)**

First Name  Last Name  Title   

# Software Navigation – Access to InfoHub

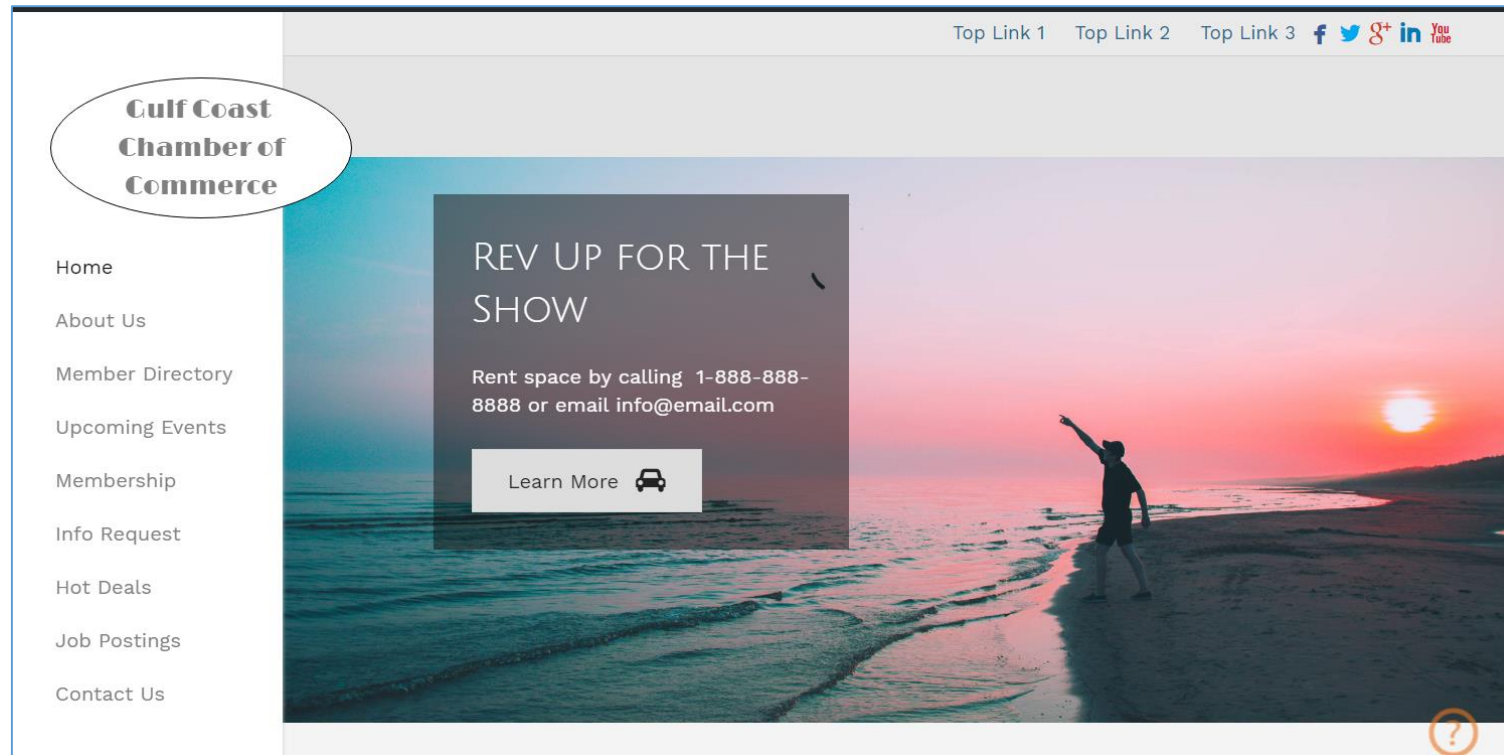
- The logged on user can access the Info Hub by clicking








The screenshot displays the GrowthZone InfoHub 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 shows the user is logged in as 'Cheri Petterson' with a 'My Info »' link. Below this is a 'NAVIGATION' menu with 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 is a welcome message: 'Welcome to your member connection and resource center!' followed by a paragraph: '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 follows: '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 reads: 'We love to hear from you. Please contact us anytime you have questions or feedback.' On the right side of the main content area, there is a section titled 'UPCOMING EVENTS' with two event cards. The first card is for 'Spring Wine Dinner & Auction' on Saturday, April 15, 2017, from 7:00:00 PM to 7:00:00 PM. The second card is for 'Summertime Barbecue & Music Festival' on Saturday, July 22, 2017, from 12:00:00 PM to 12:00:00 PM. Each event card has a blue arrow icon pointing right.

# Software Navigation – Access to your Web-site

- You can a view your website by clicking




Top Link 1 Top Link 2 Top Link 3     


**Gulf Coast Chamber of Commerce**

- Home
- About Us
- Member Directory
- Upcoming Events
- Membership
- Info Request
- Hot Deals
- Job Postings
- Contact Us

REV UP FOR THE SHOW

Rent space by calling 1-888-888-8888 or email [info@email.com](mailto:info@email.com)

Learn More 



# Software Navigation – Assigned Tasks

- Go to your list of Assigned tasks



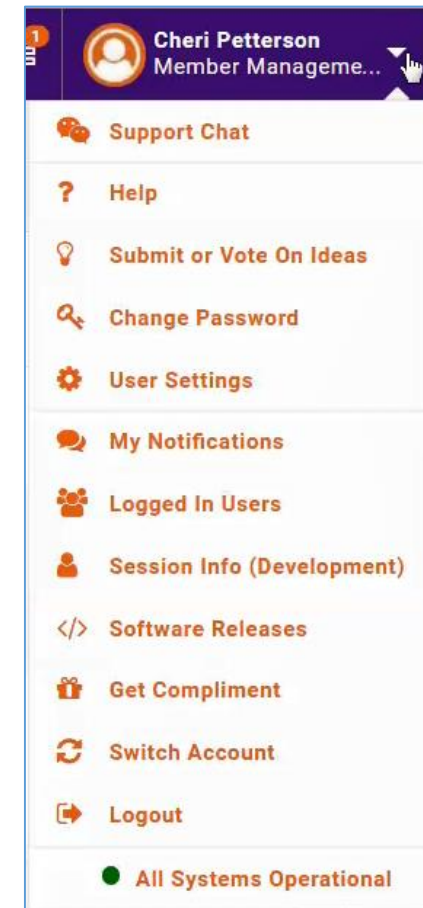
Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
		<a href="#">Follow-up Reminder for Cheri Petterson</a>	Normal		<a href="#">Adrian Chavez</a>	Cheri Petterson	3/16/2017		0
		<a href="#">Follow-up Reminder for Cheri Petterson</a>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



# Software Navigation – Additional Options

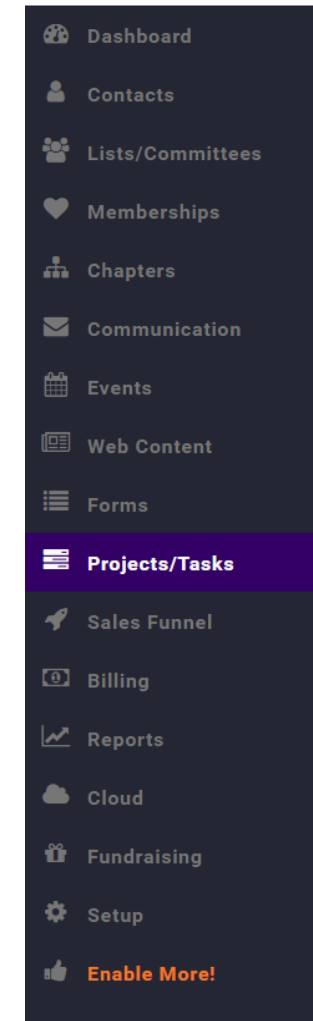
Additional options for the logged in staff member

- 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



# Work Space

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

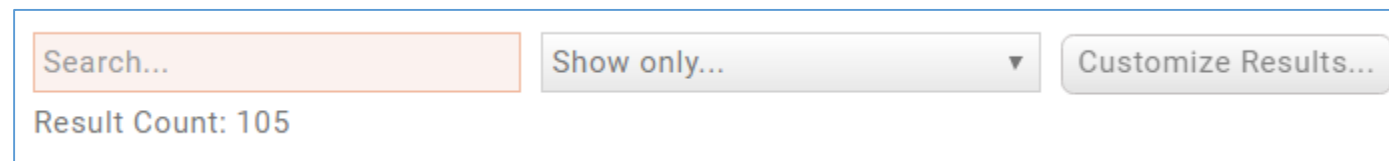
Search... Individuals Customize Results... ContactType:Individual x [Clear All] + Add Organization

Result Count: 69

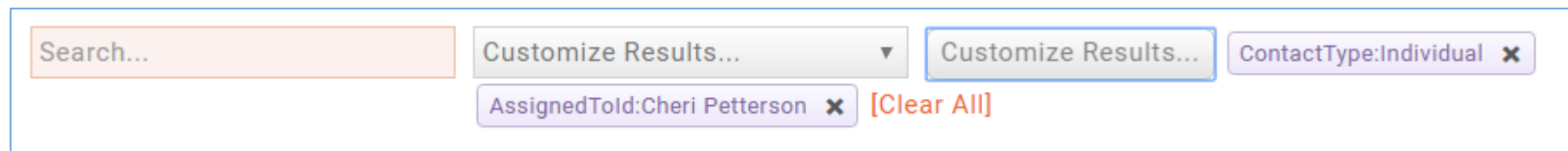
Type	Name	Balance	Primary Connection	Status	Primary Email	Primary Phone	City	State Province
	<a href="#">Cheri Petterson</a>	\$337.00	Member Management Training	Non Member	cheri.petterson@micronetonline.com	218-546-5413		
	<a href="#">Johnny Ocean</a>	\$0.00		Non Member		218-999-8722		
	<a href="#">Brandon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



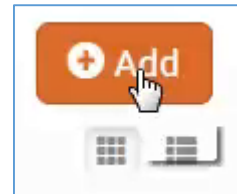
Search... Customize Results... Customize Results... ContactType:Individual ✕  
AssignedTold:Cheri Petterson ✕ [Clear All]

# Common Functions

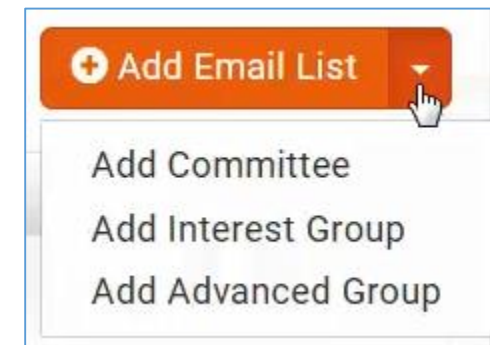
- Add
  - the module that you are using will dictate the options available
  - The most commonly used option will be displayed on the Add button



Contact



Membership



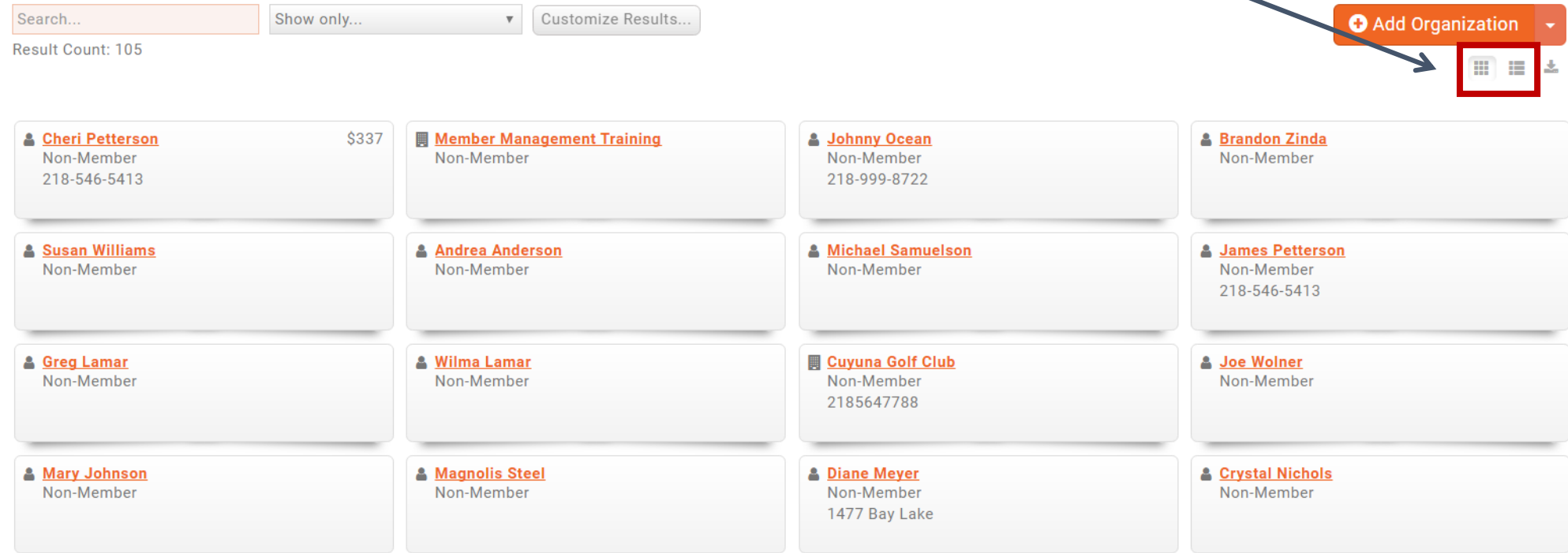
List/Committee

















# Common Functions

- Changing displays from Tile to List and vice versa

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

+ Add Organization



















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




# Common Functions

- Exporting List







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

Result Count: 105

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

# Common Functions

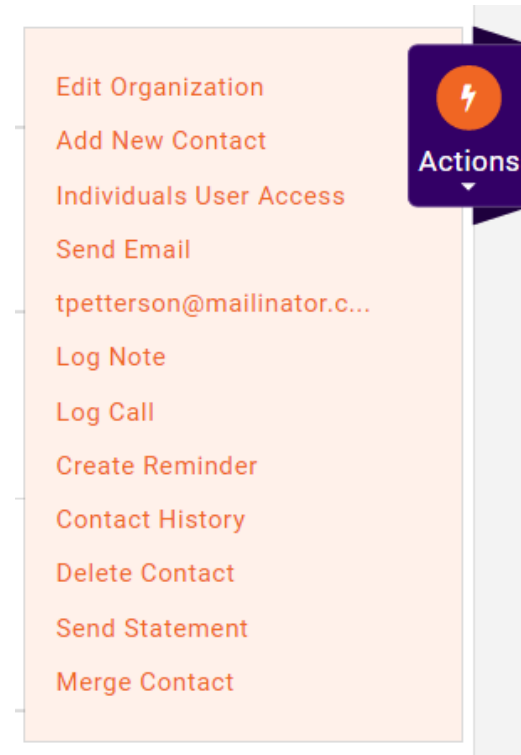
- Edit 
- Add 
- Email 
- Login to InfoHub (as user) 
- Calendar 
- Communication Status 

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




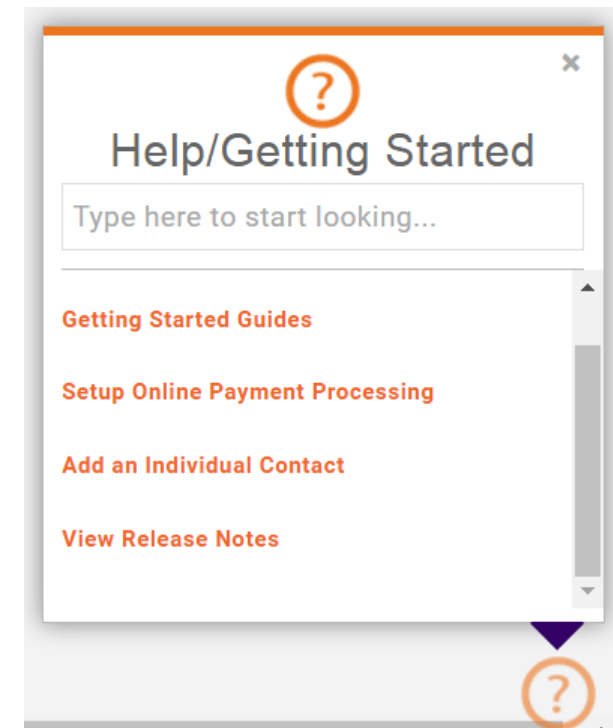
# Common Functions

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



# Common Functions

- Help 
  - Still under development, clicking this icon will provide help information and simulations



# GrowthZone Modules

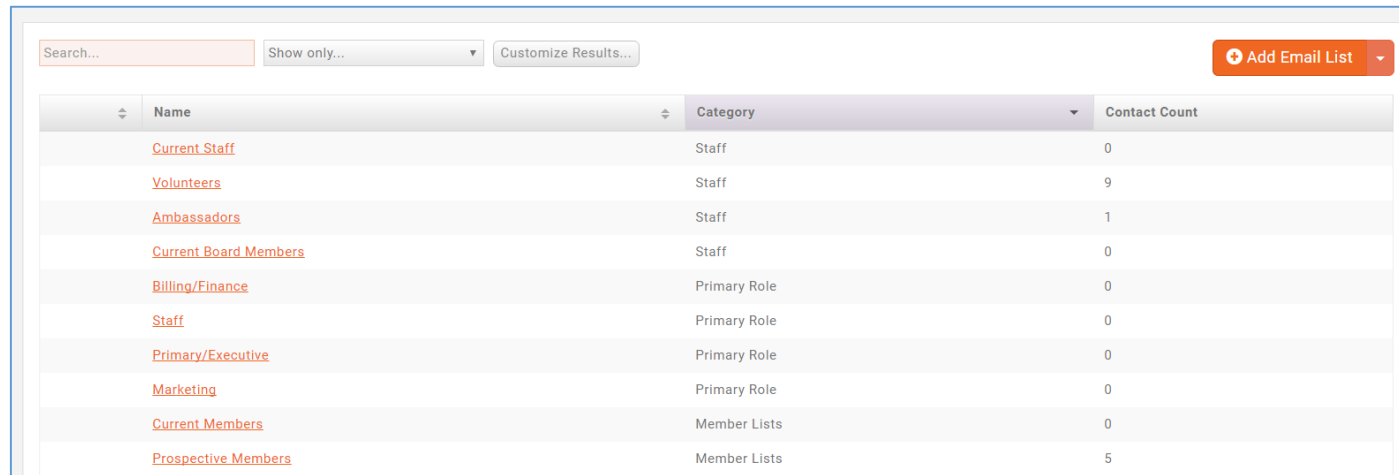
The GrowthZone Membership Management System is powerful, easy to use and designed to manage all the day-to-day operations of your organization.

# Grow Faster – Acquire New Members

- Lists/Committees
- Communications
- Contact Management
- Membership Management
- Sales Funnel\*

# Lists/Committees

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



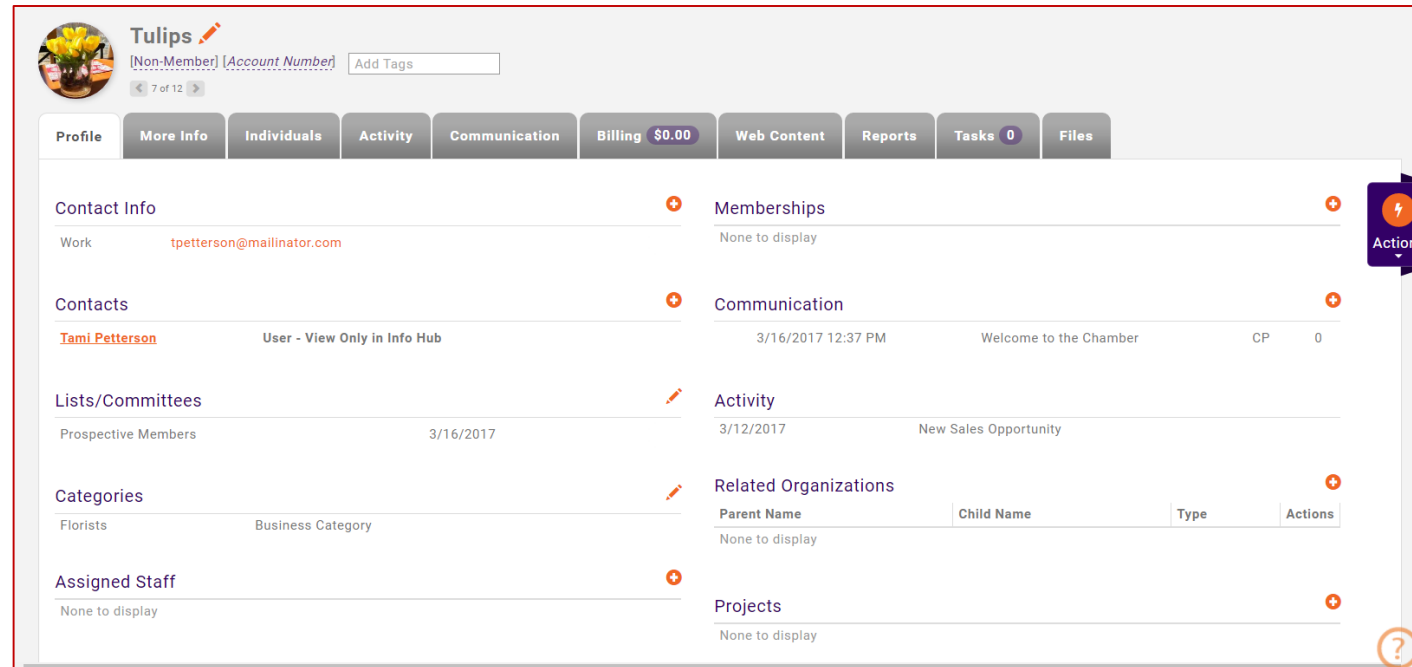
The screenshot shows a web interface for managing lists and committees. At the top, there is a search bar, a 'Show only...' dropdown, a 'Customize Results...' button, and an 'Add Email List' button. Below this is a table with the following columns: Name, Category, and Contact Count. The table contains the following data:

Name	Category	Contact Count
<a href="#">Current Staff</a>	Staff	0
<a href="#">Volunteers</a>	Staff	9
<a href="#">Ambassadors</a>	Staff	1
<a href="#">Current Board Members</a>	Staff	0
<a href="#">Billing/Finance</a>	Primary Role	0
<a href="#">Staff</a>	Primary Role	0
<a href="#">Primary/Executive</a>	Primary Role	0
<a href="#">Marketing</a>	Primary Role	0
<a href="#">Current Members</a>	Member Lists	0
<a href="#">Prospective Members</a>	Member Lists	5



# Contact Management

- Contact Management allows you to easily track your new contacts you have made face to face, over the phone, via the web



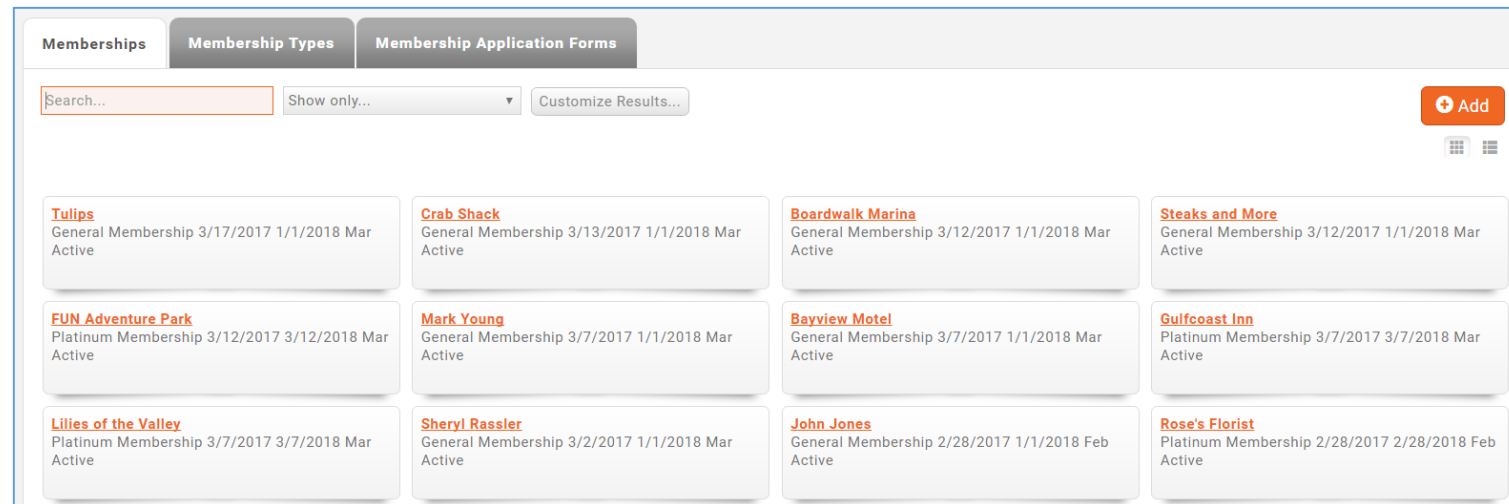
The screenshot shows a user profile for 'Tulips' with a profile picture of yellow flowers. The interface includes a navigation bar with tabs: Profile, More Info, Individuals, Activity, Communication, Billing (\$0.00), Web Content, Reports, Tasks (0), and Files. The main content area is divided into two columns of expandable sections:

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

On the right side, there is an 'Actions' dropdown menu and a help icon (question mark in a circle).

# Membership Management

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



The screenshot displays the 'Memberships' section of the GrowthZone software. It features a navigation bar with 'Memberships', 'Membership Types', and 'Membership Application Forms'. Below the navigation bar, there is a search bar, a 'Show only...' dropdown menu, and a 'Customize Results...' button. A red '+ Add' button is located in the top right corner. The main content area shows a grid of 12 membership cards, each representing a different member and their membership details.

Member Name	Membership Type	Start Date	End Date	Status
Tulips	General Membership	3/17/2017	1/1/2018	Mar Active
Crab Shack	General Membership	3/13/2017	1/1/2018	Mar Active
Boardwalk Marina	General Membership	3/12/2017	1/1/2018	Mar Active
Steaks and More	General Membership	3/12/2017	1/1/2018	Mar Active
FUN Adventure Park	Platinum Membership	3/12/2017	3/12/2018	Mar Active
Mark Young	General Membership	3/7/2017	1/1/2018	Mar Active
Bayview Motel	General Membership	3/7/2017	1/1/2018	Mar Active
Gulfcoast Inn	Platinum Membership	3/7/2017	3/7/2018	Mar Active
Lilies of the Valley	Platinum Membership	3/7/2017	3/7/2018	Mar Active
Sheryl Rassler	General Membership	3/2/2017	1/1/2018	Mar Active
John Jones	General Membership	2/28/2017	1/1/2018	Feb Active
Rose's Florist	Platinum Membership	2/28/2017	2/28/2018	Feb Active



# Membership Management

- Membership Application Form
  - Integrated to 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

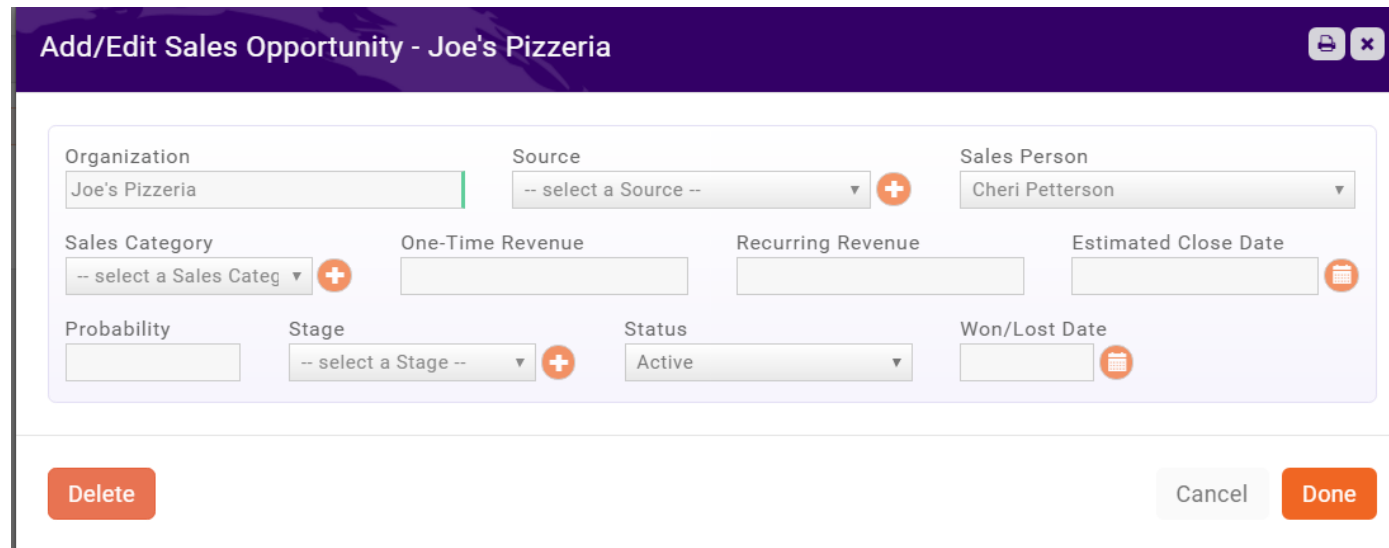
Enter Contact Information

**First Name\***

**Last Name\***

# Sales Funnel\*

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



The screenshot shows a software interface for adding or editing a sales opportunity. The title bar reads "Add/Edit Sales Opportunity - Joe's Pizzeria". The form contains several fields:

- Organization:** Joe's Pizzeria
- Source:** -- select a Source --
- Sales Person:** Cheri Petterson
- Sales Category:** -- select a Sales Categ --
- One-Time Revenue:** [Empty text box]
- Recurring Revenue:** [Empty text box]
- Estimated Close Date:** [Calendar icon]
- Probability:** [Empty text box]
- Stage:** -- select a Stage --
- Status:** Active
- Won/Lost Date:** [Calendar icon]

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

# Sales Funnel\*

- Allows for tracking:
  - One time revenue
  - Recurring revenue
  - Probability of Sale
  - Timeline
  - Communications
  - Tasks

Sales Opportunity Communication Report Run Report

Sales Persons: 
 Sales Statuses: 
 Sales Stages:

Sales Source: 
 Sales Categories:

Criteria / Filters

**Display Options**

Fields to Display: 
 Summarize By:  
 Display Mode:

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					

# Retain & Engage Your Members

- Events Management
- Info Hub
- Events Expo\*
- Web Content\*
- Fundraising\*
- On-line Store\*
- Certification\*

# Events Management

- 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



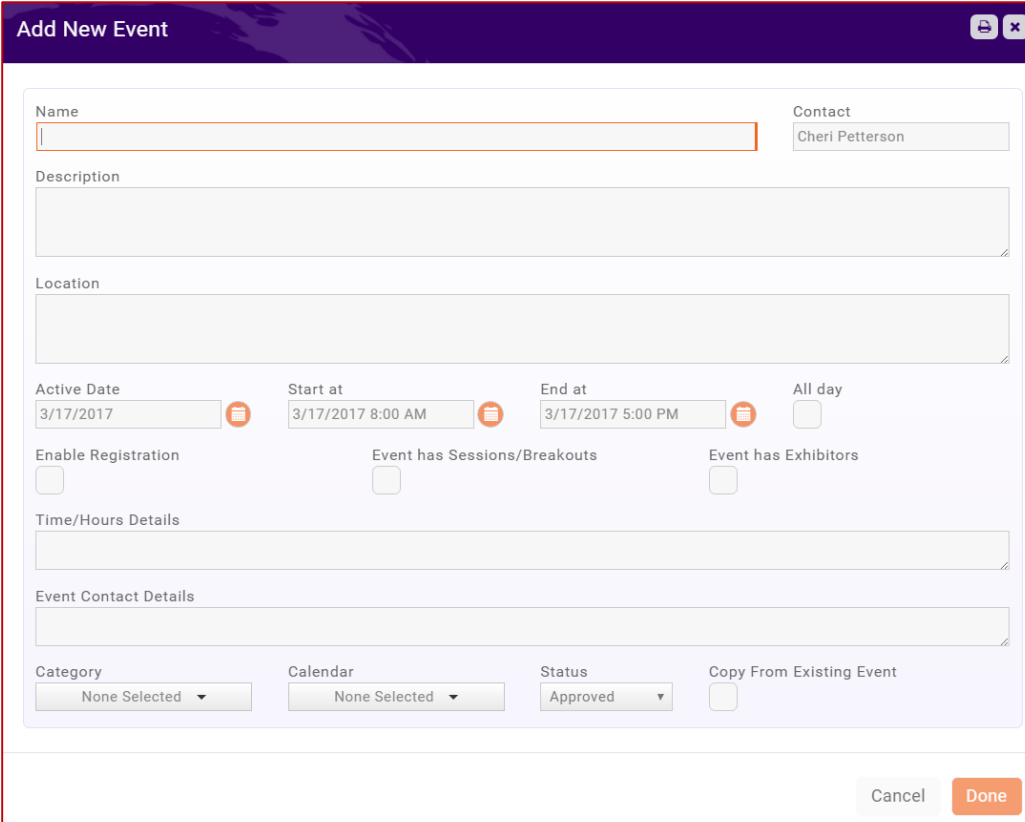
**Additional Information**

Event Contact:  
 Cheri Petterson  
 218-546-5413

Powered By MemberZone

# Events Management

- Add Events
- Manage Registration
- Manage Sessions/Break-outs
- Manage Exhibitors (Coming Soon)
- Manage Sponsors
- Manage Fees
- Manage Attendance
- Manage Communications



The screenshot shows the 'Add New Event' form with the following fields and options:

- Name:** A text input field.
- Contact:** A dropdown menu showing 'Cheri Petterson'.
- Description:** A large text area.
- Location:** A large text area.
- Active Date:** A date picker set to 3/17/2017.
- Start at:** A date and time picker set to 3/17/2017 8:00 AM.
- End at:** A date and time picker set to 3/17/2017 5:00 PM.
- All day:** A checkbox that is currently unchecked.
- Enable Registration:** A checkbox that is currently unchecked.
- Event has Sessions/Breakouts:** A checkbox that is currently unchecked.
- Event has Exhibitors:** A checkbox that is currently unchecked.
- Time/Hours Details:** A large text area.
- Event Contact Details:** A large text area.
- Category:** A dropdown menu set to 'None Selected'.
- Calendar:** A dropdown menu set to 'None Selected'.
- Status:** A dropdown menu set to 'Approved'.
- Copy From Existing Event:** A checkbox that is currently unchecked.

At the bottom right of the form are 'Cancel' and 'Done' buttons.

# Events Management - Reporting

- Activity Report
- Attendee Report
- Discount Report
- Sessions Report
- Sponsorship Report

Event Activity Report

Contact:  Date Range:  Display Only Contacts:

Event:

Criteria / Filters:

**Display Options**

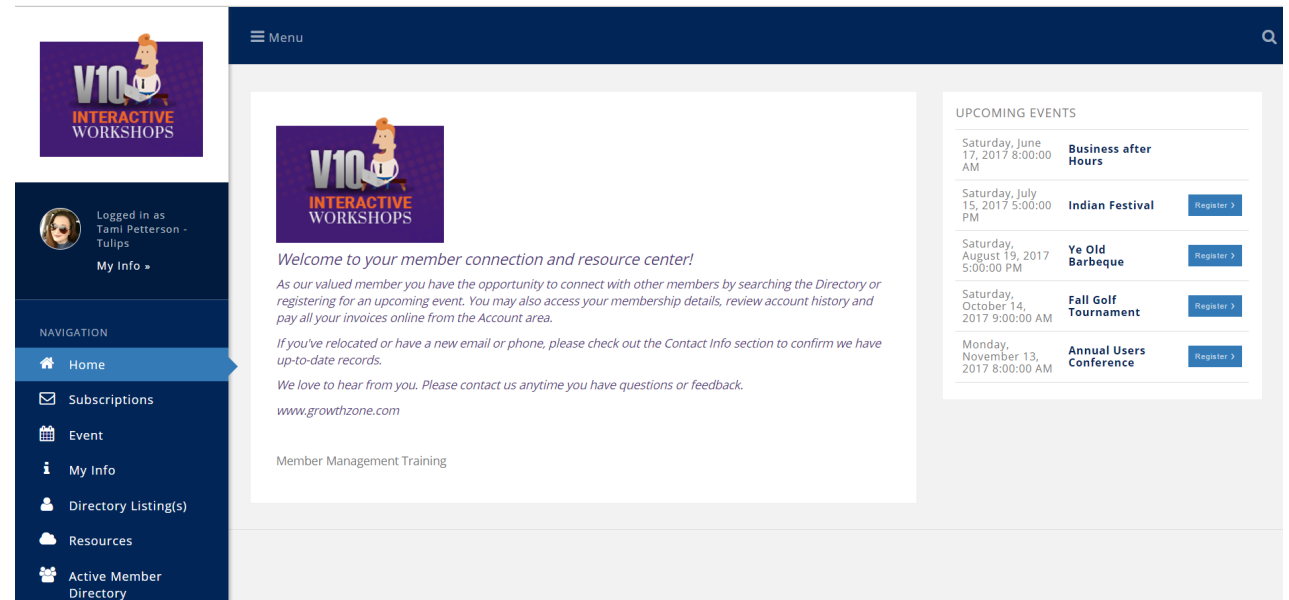
Fields to Display:  Summarize By:   Display Mode:

Results

Contact Name	Default Email	Default Phone	Event Name	Event Start Date	Event End Date	Registration Status	Registration Type	Total Registration Fee	
Cheri Petterson	cheri.petterson@micronetonline.com	218-546-5413	Summertime Barbecue & Music Festival	7/22/2017	7/23/2017	Invited			
Cheri Petterson	cheri.petterson@micronetonline.com	218-546-5413	Spring Wine Dinner & Auction	4/16/2017	4/16/2017	Registered	Spring Wine Dinner Registration Fee	\$75.00	
Cheri Petterson	cheri.petterson@micronetonline.com	218-546-5413	Meet The Community	3/25/2017	3/25/2017	Registered	Meet the Community Early Registration	\$12.00	
Steve Johnson	sjohnson@mallinator.com		Spring Wine Dinner & Auction	4/16/2017	4/16/2017	Registered	Spring Wine Dinner Registration Fee	\$75.00	
<b>Count\Average\Totals</b>								<b>4</b>	<b>\$162.00</b>

# Info Hub

- 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 shows a member portal for V10 Interactive Workshops. The page features a dark blue header with a 'Menu' icon and a search icon. The main content area is white and contains a welcome message, a list of upcoming events, and a navigation sidebar. The sidebar includes a 'My Info' section with a profile picture and a 'NAVIGATION' section with links to Home, Subscriptions, Event, My Info, Directory Listing(s), Resources, and Active Member Directory. The main content area displays a welcome message and a list of upcoming events, including Business after Hours, Indian Festival, Ye Old Barbeque, Fall Golf Tournament, and Annual Users Conference. The footer of the page contains the text 'Member Management Training'.

Menu

V10 INTERACTIVE WORKSHOPS

Logged in as  
Tami Petterson - Tulips  
My Info »

NAVIGATION

- Home
- Subscriptions
- Event
- My Info
- Directory Listing(s)
- Resources
- Active Member Directory

V10 INTERACTIVE WORKSHOPS

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.  
[www.growthzone.com](http://www.growthzone.com)

Member Management Training

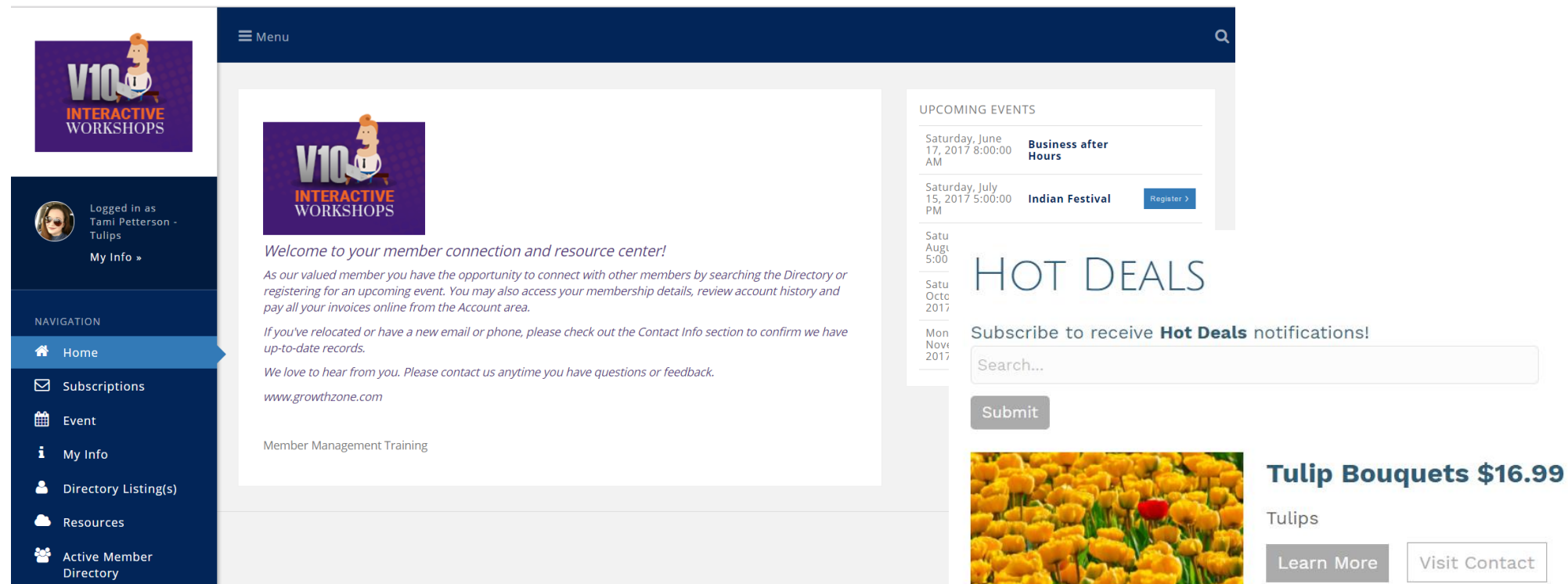
UPCOMING EVENTS

Saturday, June 17, 2017 8:00:00 AM	<b>Business after Hours</b>	
Saturday, July 15, 2017 5:00:00 PM	<b>Indian Festival</b>	<a href="#">Register &gt;</a>
Saturday, August 19, 2017 5:00:00 PM	<b>Ye Old Barbeque</b>	<a href="#">Register &gt;</a>
Saturday, October 14, 2017 9:00:00 AM	<b>Fall Golf Tournament</b>	<a href="#">Register &gt;</a>
Monday, November 13, 2017 8:00:00 AM	<b>Annual Users Conference</b>	<a href="#">Register &gt;</a>



# Web Content\*

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



The screenshot shows a member portal interface. On the left is a dark blue navigation sidebar with a user profile for 'Tami Petterson - Tulips' and menu items: Home, Subscriptions, Event, My Info, Directory Listing(s), Resources, and Active Member Directory. The main content area features a 'V10 INTERACTIVE WORKSHOPS' logo and a welcome message: 'Welcome to your member connection and resource center!'. Below this, it offers members the opportunity to connect via the Directory, register for events, and pay invoices online. A 'Member Management Training' link is also visible. On the right, there's an 'UPCOMING EVENTS' section listing 'Business after Hours' and 'Indian Festival'. Below that is a 'HOT DEALS' section with a search bar and a 'Submit' button. A featured deal for 'Tulip Bouquets \$16.99' is shown with a photo of yellow tulips and buttons for 'Learn More' and 'Visit Contact'.

# Fundraising\*

- 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	

**Actions**

**Special Olympics**

Summary | Donation Activity | Recurring | Donors | Donation Setup

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

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

**Actions**

# Overview

- 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



LOGO T-SHIRT

**\$ 40.00**

[Details](#)

[Add To Cart](#)



LOGO BACKPACK

**\$ 50.00**

[Details](#)

[Add To Cart](#)



LOGO BASEBALL CAPS

**\$ 25.00**

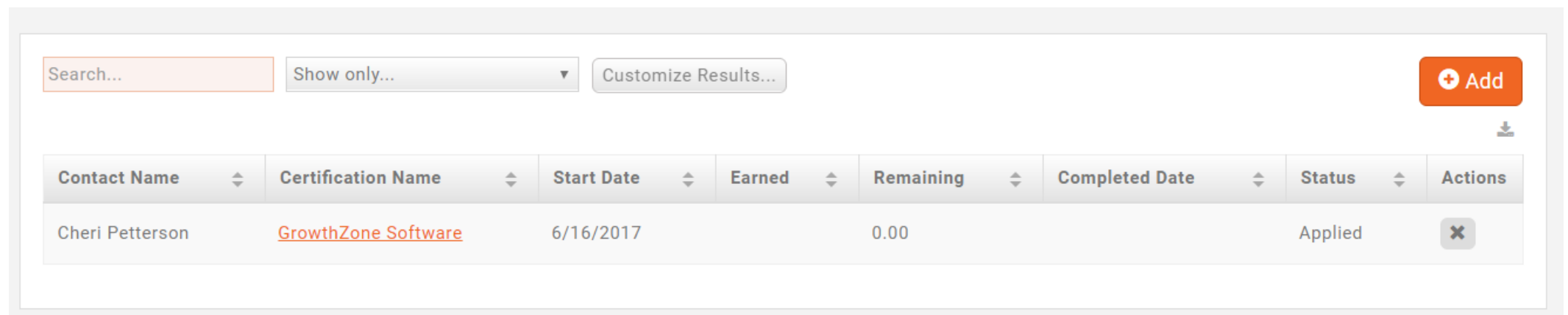
[Details](#)

[Add To Cart](#)


# Certification

The Certification module allows you to track certifications for your members

- Track hours
- Track Requirements
- Provide Certificates



The screenshot shows a web interface for the Certification module. At the top, there is a search bar with the text "Search...", a dropdown menu labeled "Show only..." with a downward arrow, and a button labeled "Customize Results...". On the right side, there is an orange button with a plus sign and the text "Add", and a download icon below it. Below these elements is a table with the following columns: Contact Name, Certification Name, Start Date, Earned, Remaining, Completed Date, Status, and Actions. The table contains one row of data: Cheri Petterson, GrowthZone Software, 6/16/2017, 0.00, Applied, and an Actions column with a close icon (X).

Contact Name	Certification Name	Start Date	Earned	Remaining	Completed Date	Status	Actions
Cheri Petterson	<a href="#">GrowthZone Software</a>	6/16/2017		0.00		Applied	

# Do More with Less Time

- Billing
- Reporting
- Forms\*
- Project Management\*

# Billing

- Easy creating of invoices
- Accepting Payments
- Integrated Payment Processing

Overview	Pending Delivery	Payments	Invoices	Upcoming Billing	Upcoming Recognition	Deposits	Credit Memos	Accounting Summary
<b>Invoicing</b>			<b>Payments</b>					
6	Invoices Ready to Email	\$8,170.83	3	Undeposited payments	\$2,875.00			
0	Invoices Ready to Print	\$0.00	<b>Accounts Receivable</b>					
0	Invoices Ready to Print and Email	\$0.00	29	Total Accounts Receivable	\$32,564.58			
			0	Accounts Receivable over 90 Days	\$0.00			
<b>Common Tasks</b>			<b>Reports</b>			<b>Setup</b>		
<a href="#">Create New Invoice</a> <a href="#">Enter Check Payment</a> <a href="#">Enter Cash Payment</a> <a href="#">Enter Credit Card Payment</a>			<a href="#">Accounts Receivable</a> <a href="#">Accounts Receivable (Detail)</a> <a href="#">Integrated Processing Monthly Statement</a> <a href="#">Integrated Processing Monthly Transfers</a>			<a href="#">Chart of Accounts</a> <a href="#">Memberships/Products/Services</a> <a href="#">Add/Edit Invoice &amp; Statements Templates</a>		

# Reporting

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

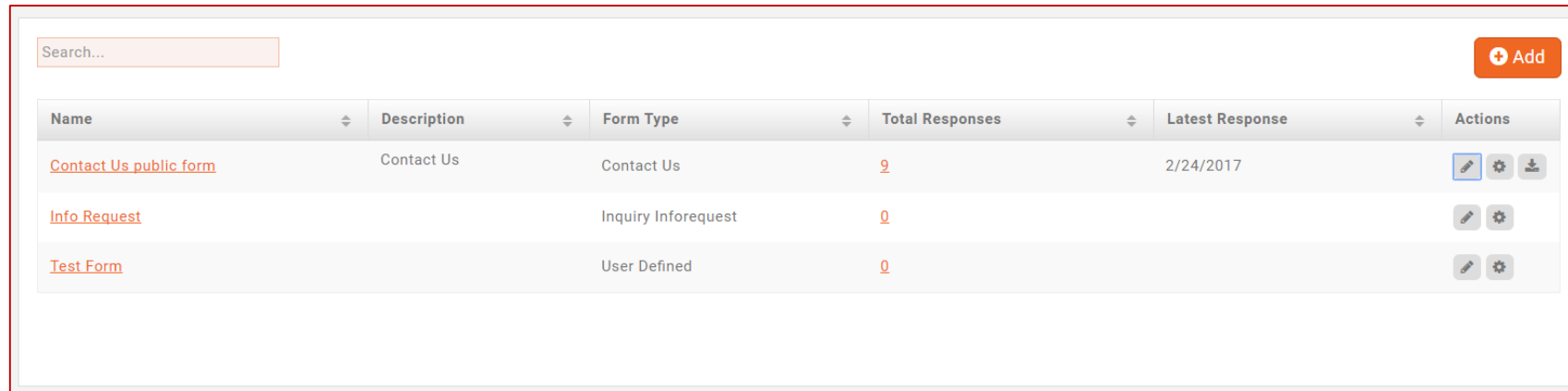
Search... Billing Accounting Customize Results... Category: Billing\_Accounting [Clear All]

Result Count: 18








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

# Form Builder\*

- 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
<a href="#">Contact Us public form</a>	Contact Us	Contact Us	9	2/24/2017	  
<a href="#">Info Request</a>		Inquiry Inforequest	0		 
<a href="#">Test Form</a>		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
<a href="#">Welcome Letter</a>	Important	Members On-boarding		Brandon Zinda			0
<a href="#">Ambassador Visit</a>	Important	Members On-boarding		Sheryl Rassler			0
<a href="#">Welcome Email</a>	Important	Members On-boarding		Brandon Zinda			0

# Questions??

For additional training, contact [training@growthzone.com](mailto:training@growthzone.com)