

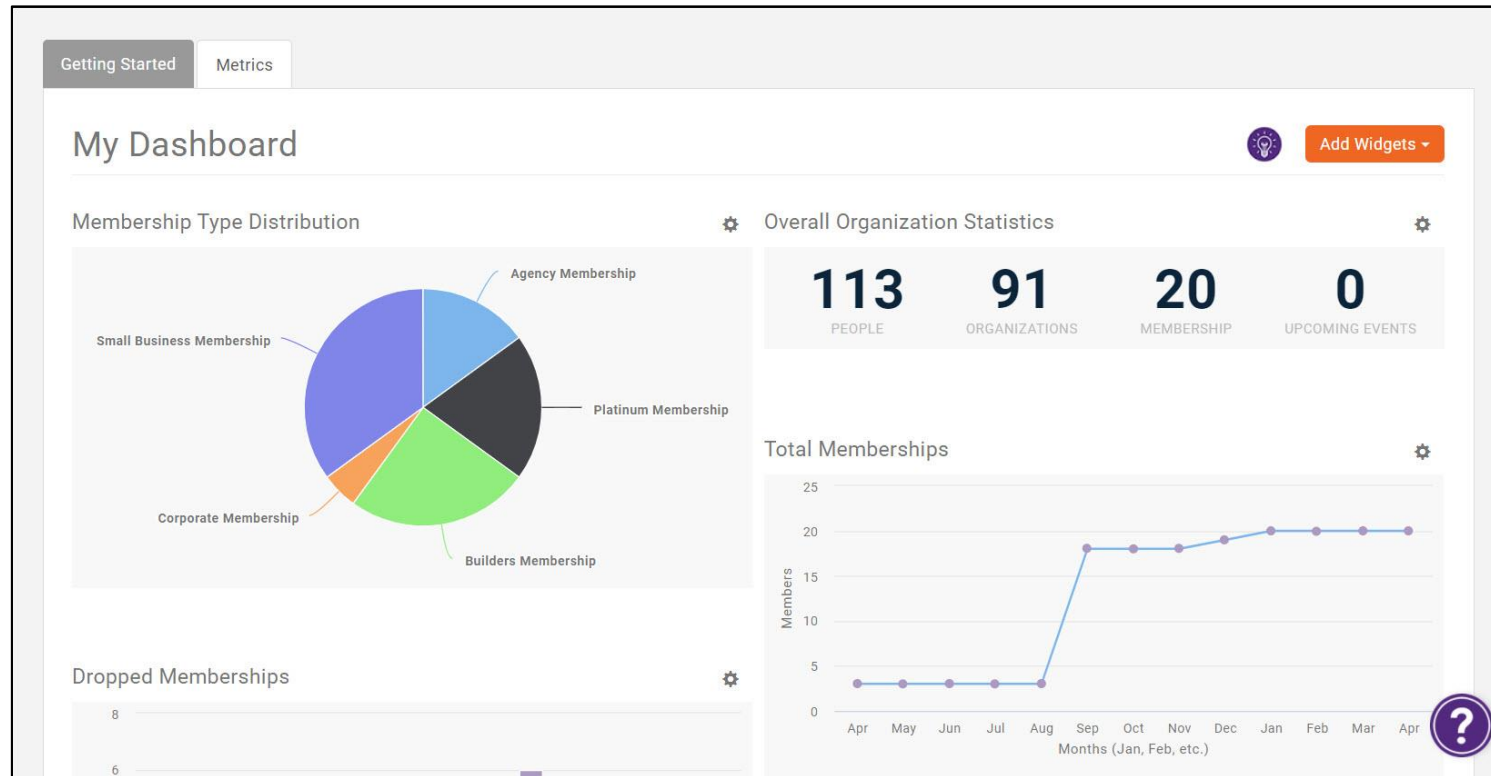
GrowthZone: Solution Overview



Agenda

System Navigation

Overview of GrowthZone Modules



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

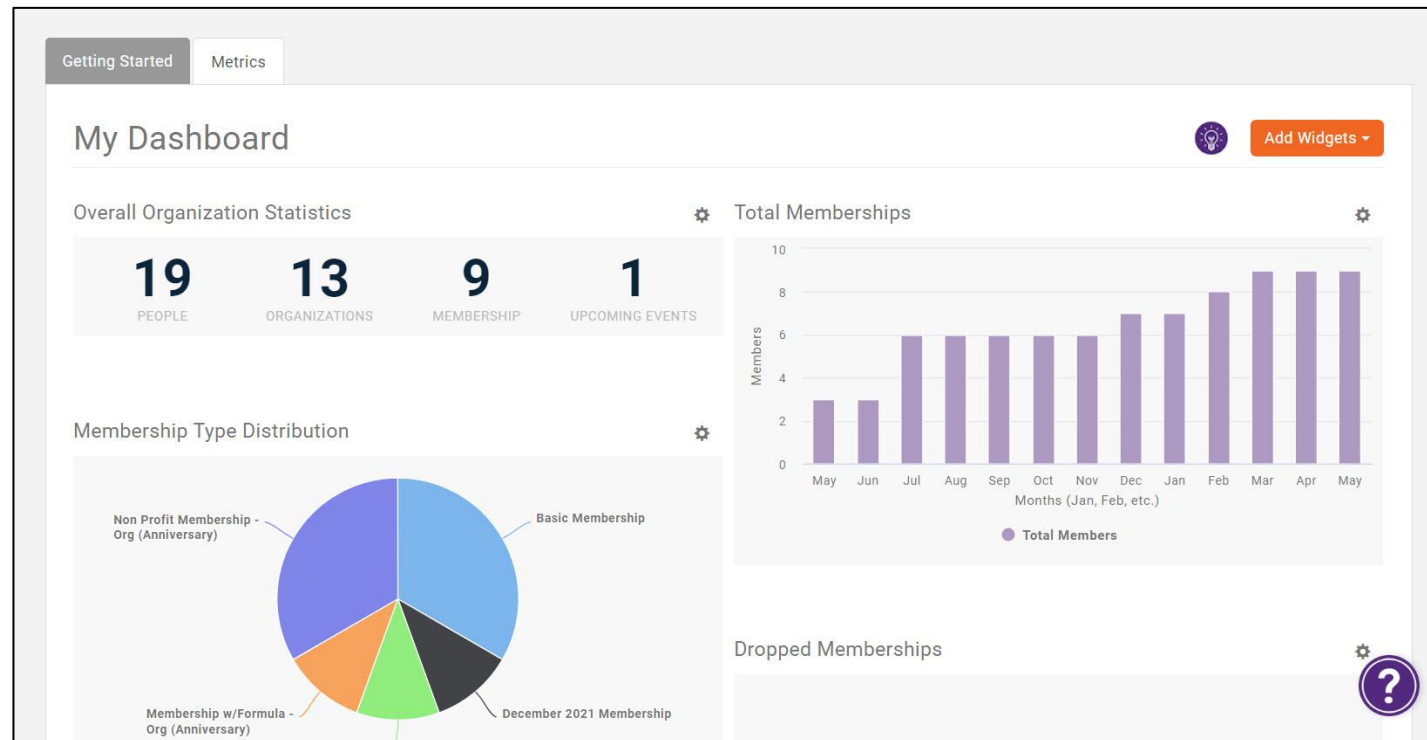
Easy to use, and designed to manage all the day-to-day operations of your organization

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...*

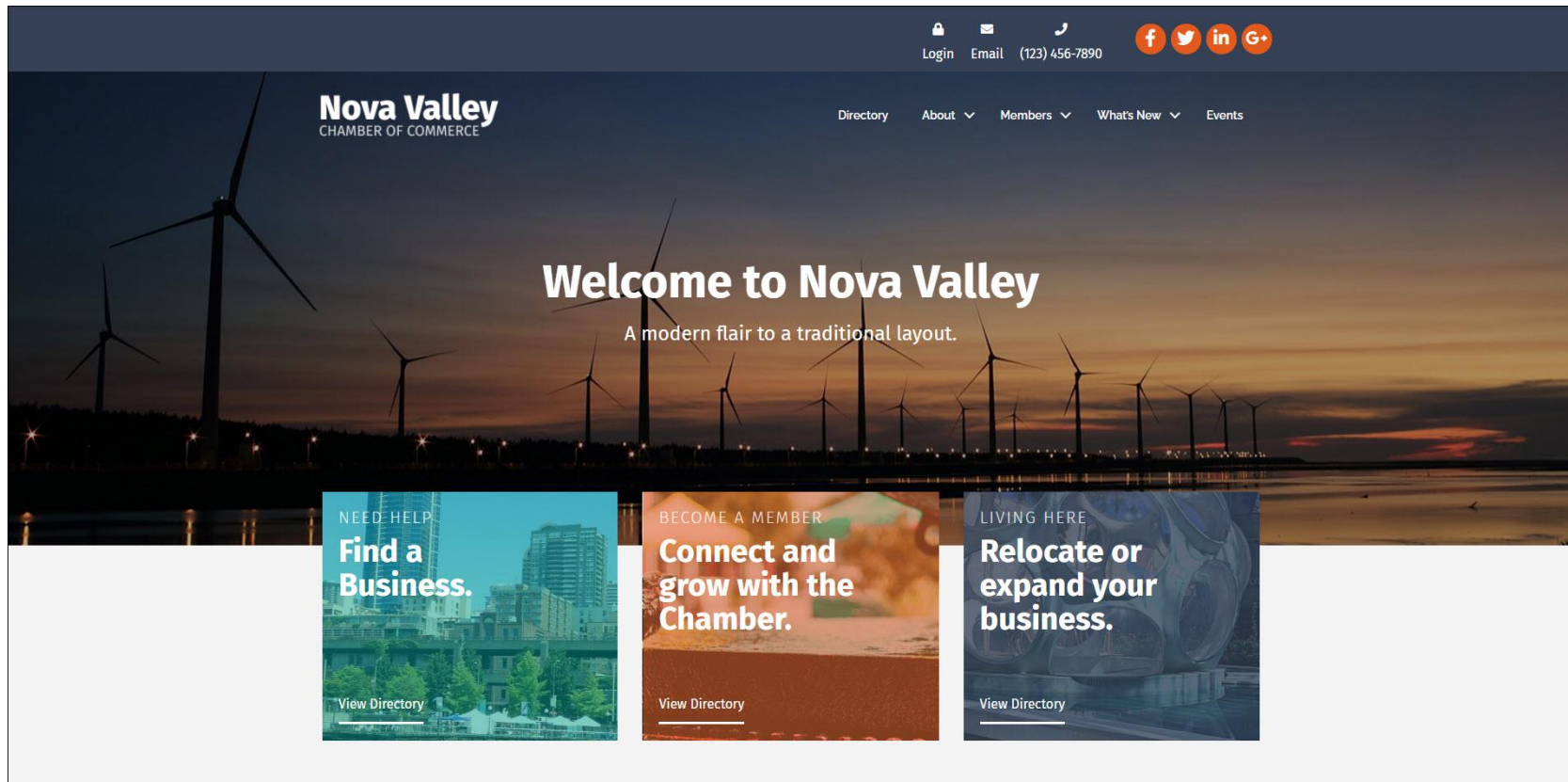
The screenshot displays the member view interface for the Earth Association. On the left is a dark blue navigation sidebar with the following items: Home (highlighted), My Info, My Subscriptions, Events, Continuing Education, Member Satisfaction Survey, Visit GrowthZone, eBay, Greensboro Link, and New Link. The main content area features a welcome message: "Welcome to your member connection and resource center! As our valued member of Earth Association you have the opportunity to connect with other members, register for events, join newsletter lists, share news, jobs, hot deals and more! Take a video tour of the Info Hub [here!](#)" Below this is a section titled "The Latest COVID-19 UPDATES" with a "STAY HOME SAVE LIVES" graphic. A text block states: "We are working hard to bring you resources related to the Coronavirus from both our Minnesota Health and Social Services Division of Public Health and from our partners and other trusted resources around the country. For more details and updates regarding the Green Valley resources visit our [Crisis Management Resources Page](#)". To the right, there is an "UPCOMING EVENTS" table and an "ACCOUNT BALANCE" section showing \$0.00. At the bottom, there is a "DONATE" button with the text "YOU CAN MAKE A DIFFERENCE".

UPCOMING EVENTS		
Apr 2	Trivia Madness! Friday, 5:00 PM	Register >
Apr 12	Virtual Golf Tournament Monday, 12:00 AM	Register >
Apr 13	New Member Orientation Tuesday, 9:00 AM	Register >
May 8	Spring Trade Show 2021 Saturday, 8:00 AM	Register >
May 15	Virtual Golf Tournament Saturday, 12:00 AM	Register >

ACCOUNT BALANCE
\$0.00 [Go to Billing](#)

Overview – Website – Public View

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



Staff View - Database

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

GrowthZone
smarter association software

TRAINING
Join us for GrowthZone online training.
[View the details & register now!](#)

- Apr 2 LIVE - GrowthZone - Managing Member... [...](#)
- Apr 5 LIVE - GrowthZone Solution Overview [...](#)
- Apr 7 LIVE - GrowthZone Communications [...](#)

[View Full Calendar >](#)

shellys

.....

Remember Me [Need Help?](#)

Log In

REFER & EARN

Refer a colleague from another association or chamber & receive a \$250 cash card!

[Details >>](#)

?

Staff View – Database Navigation

Header
Navigation Panel
Work Space
Common Functions

Overall Organization Statistics

Category	Count
PEOPLE	19
ORGANIZATIONS	13
MEMBERSHIP	9
UPCOMING EVENTS	1

Membership Type Distribution

Membership Type	Count
Basic Membership	4
Non Profit Membership - Org (Anniversary)	3
Membership w/Formula - Org (Anniversary)	2
December 2021 Membership	1

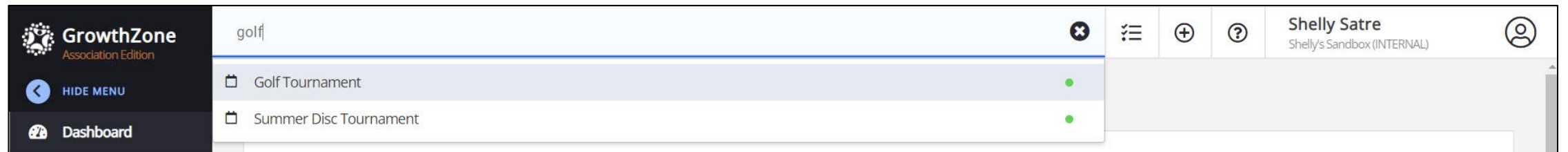
Total Memberships (Monthly)

Month	Total Members
May	3
Jun	3
Jul	6
Aug	6
Sep	6
Oct	6
Nov	6
Dec	7
Jan	7
Feb	8
Mar	9
Apr	9
May	9

Software Navigation - Header

Search

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



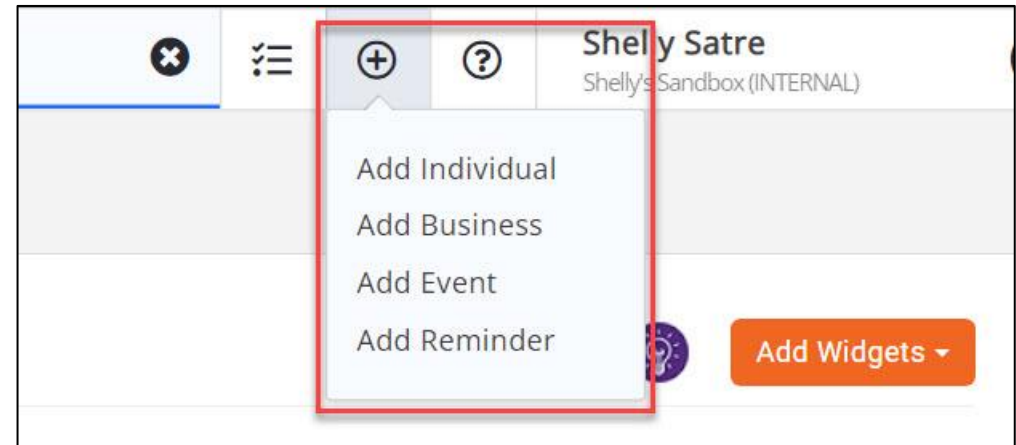
Software Navigation – Quick Actions

Add Individual Contacts...

Add Business Contacts...

Add Events...

Add Reminders...



Software Navigation – Quick Actions

Example

Add Contacts - Organization

The screenshot shows a software window titled "Add/Edit Organization". The form contains the following fields and options:

- Name:** The Saddlery
- Phone, email, or website:** pmanne@mailinator.com
- Address:** (empty)
- City:** (empty)
- State Province:** (empty)
- Postal Code:** (empty)
- Country:** (dropdown menu)
- Type:** -- No Choice --

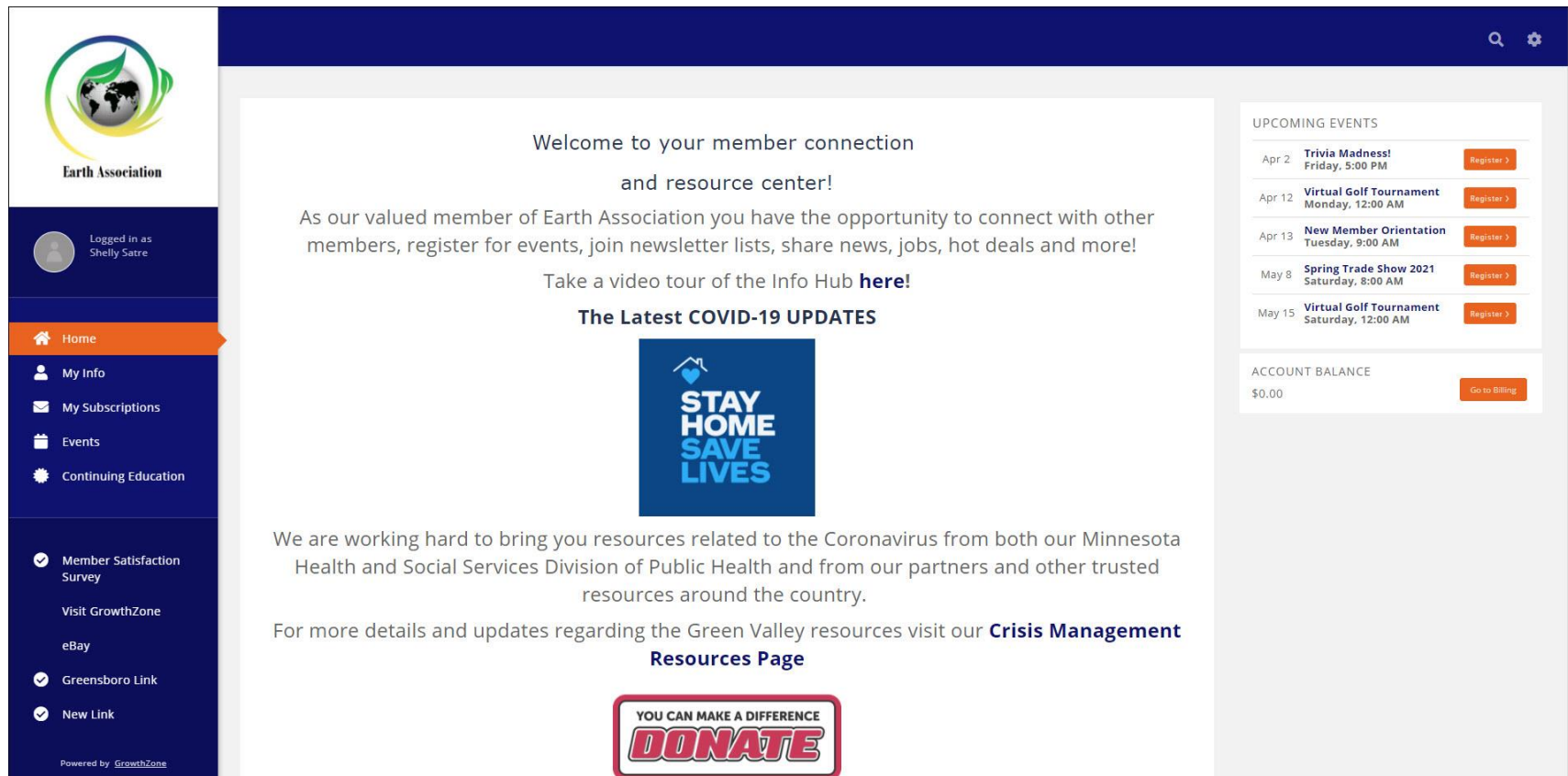
Individuals (Optional)

First Name	Last Name	Title
Paul	Manne	Owner

Buttons: Cancel, Done

Software Navigation – Info Hub

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



The screenshot displays the Earth Association member portal. On the left is a dark blue sidebar with the Earth Association logo at the top, followed by a user profile for Shelly Satre. Below are navigation links: Home (highlighted), My Info, My Subscriptions, Events, Continuing Education, Member Satisfaction Survey, Visit GrowthZone, eBay, Greensboro Link, and New Link. The main content area features a welcome message, a video tour link, and a COVID-19 update section with a 'STAY HOME SAVE LIVES' graphic. A 'DONATE' button is visible at the bottom. The right sidebar shows 'UPCOMING EVENTS' with a list of events and their registration links, and an 'ACCOUNT BALANCE' section showing \$0.00 with a 'Go to Billing' link.

Earth Association

Logged in as Shelly Satre

Home

My Info

My Subscriptions

Events

Continuing Education

Member Satisfaction Survey

Visit GrowthZone

eBay

Greensboro Link

New Link

Powered by GrowthZone

Welcome to your member connection and resource center!

As our valued member of Earth Association you have the opportunity to connect with other members, register for events, join newsletter lists, share news, jobs, hot deals and more!

Take a video tour of the Info Hub [here!](#)

The Latest COVID-19 UPDATES

STAY HOME SAVE LIVES

We are working hard to bring you resources related to the Coronavirus from both our Minnesota Health and Social Services Division of Public Health and from our partners and other trusted resources around the country.

For more details and updates regarding the Green Valley resources visit our **Crisis Management Resources Page**

YOU CAN MAKE A DIFFERENCE DONATE

UPCOMING EVENTS

Apr 2	Trivia Madness! Friday, 5:00 PM	Register >
Apr 12	Virtual Golf Tournament Monday, 12:00 AM	Register >
Apr 13	New Member Orientation Tuesday, 9:00 AM	Register >
May 8	Spring Trade Show 2021 Saturday, 8:00 AM	Register >
May 15	Virtual Golf Tournament Saturday, 12:00 AM	Register >

ACCOUNT BALANCE

\$0.00 [Go to Billing](#)

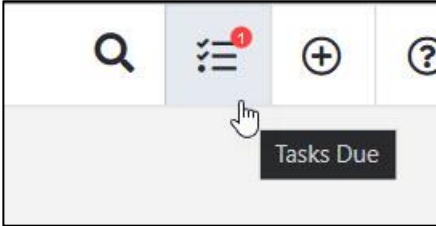
Software Navigation – Website

The logged on staff user can view your website by clicking



Software Navigation – Assigned Tasks

Go to your list of Assigned tasks by clicking



Projects | **Tasks** | Task Calendar

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

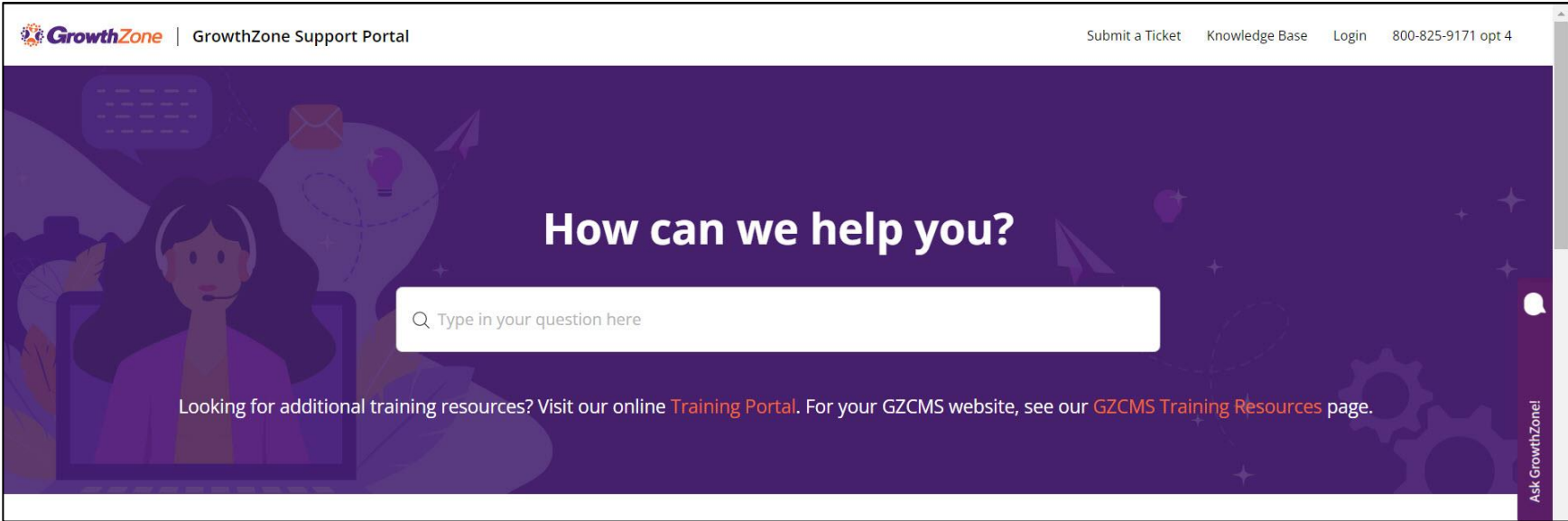
Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
		Follow-up Reminder for Cheri Petterson	Normal		Adrian Chavez	Cheri Petterson	3/16/2017		0
		Follow-up Reminder for Cheri Petterson	Normal	Member Acquisition	Adrian Chavez	Cheri Petterson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

Software Navigation – Help

Go to the online Knowledge Base/ticket portal:



Search for articles, chat with Support, and Submit a ticket all from one location!



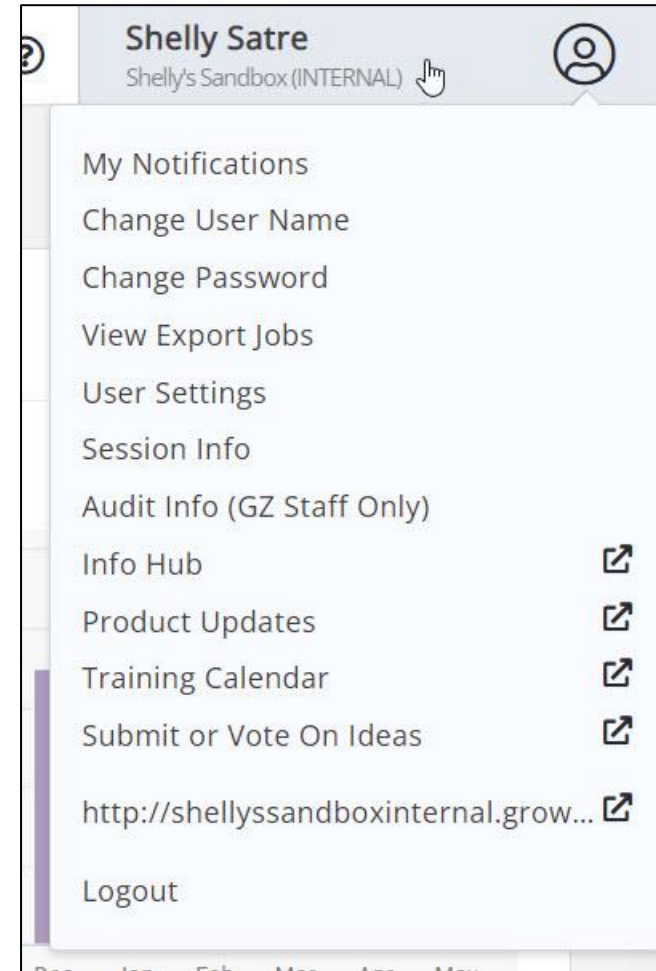
Software Navigation – Add'l Options

Options for the logged in staff member

- *Notifications*
- *Change User Name or Password*
- *View Export Jobs*
- *User Settings*
- *Session Info*

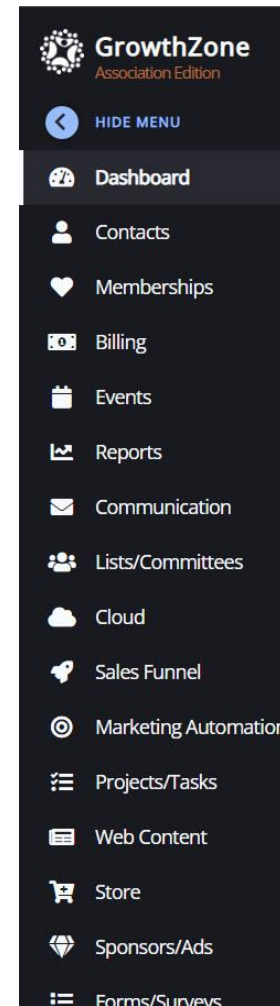
Plus links to:

- *Info Hub*
- *Product Updates*
- *Training Calendar*
- *UserVoice*
- *GZCMS website (if applicable)*



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

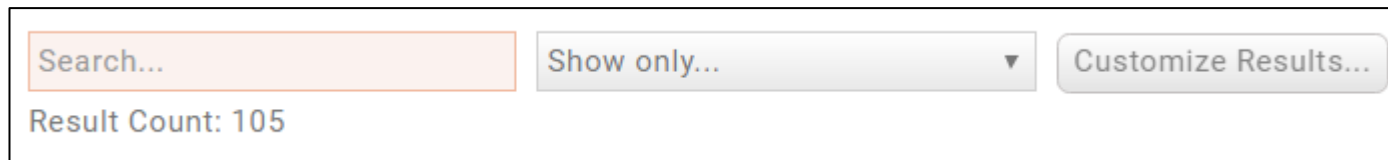
Result Count: 69

Type	Name	Balance	Primary Connection	Status	Primary Email	Primary Phone	City	State Province
	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				

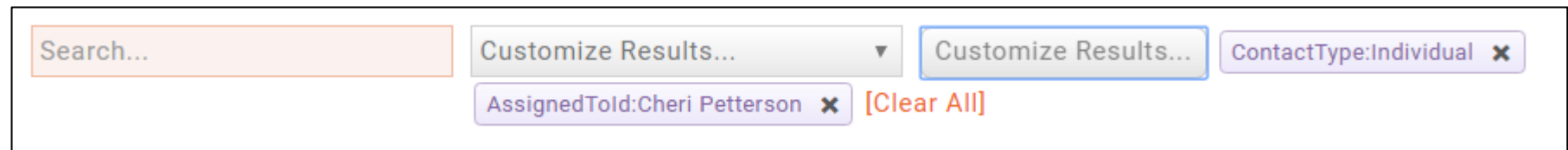
Common Module Functions

Search Function – search functions are available throughout the software

- *Type ahead search*
- *Show Only*
- *Customize Results*



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

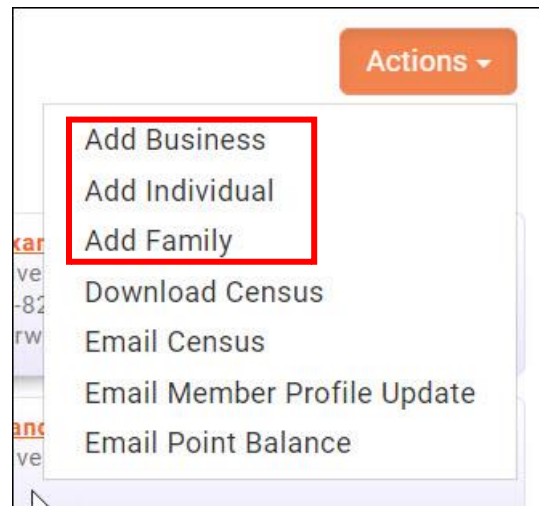


Search... Customize Results... ▼ Customize Results... ContactType:Individual ✕
AssignedTold:Cheri Petterson ✕ [Clear All]

Common Module Functions

Add

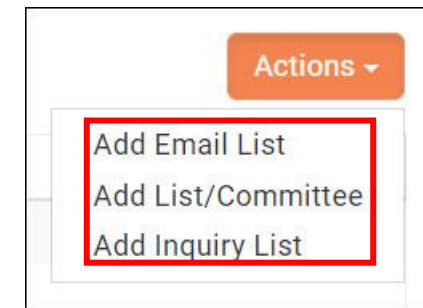
- *The module that you are using will dictate the options available*
- *The most commonly used options will be displayed on the button(s) in the upper right corner*



Contacts



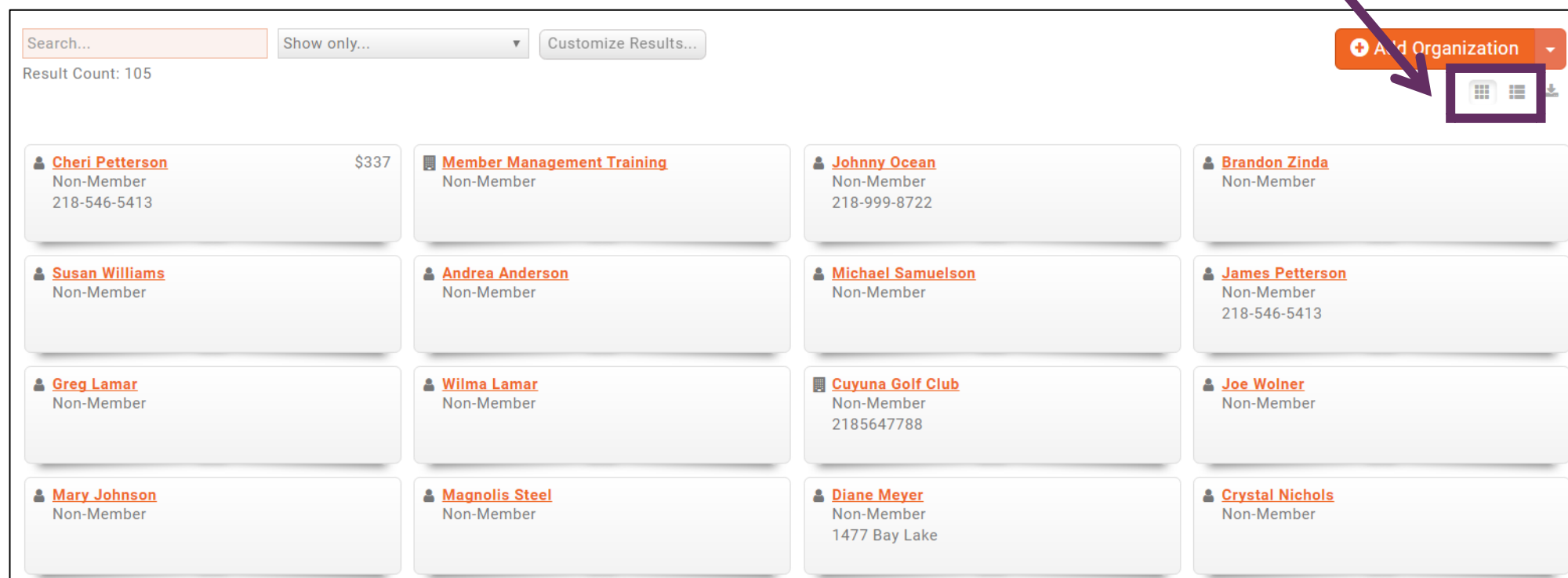
Memberships



Lists/Committees

















Common Module Functions

Changing displays from Cards to List and vice versa



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

Result Count: 105

 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 Module Functions






Exporting List

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

Result Count: 105

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

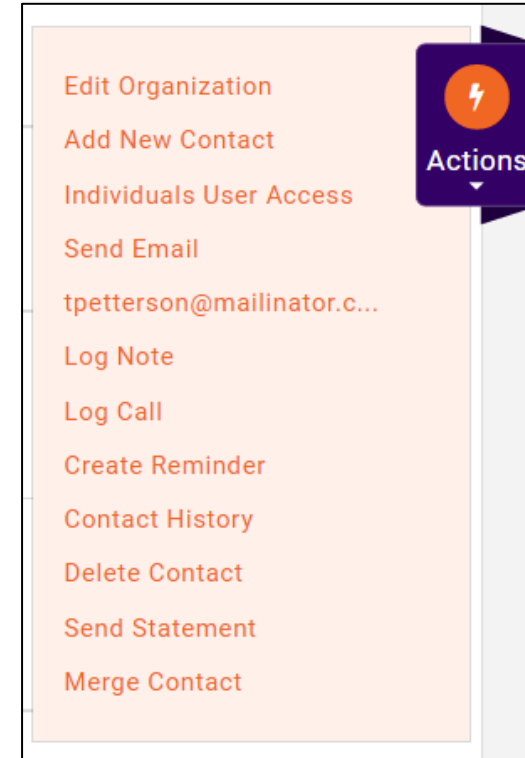
Other Common Functions

-  Edit
-  Add
-  Login to Info Hub (as user)
-  Download
-  Communication Status

Note – some of the action buttons shown above may be hidden until you dwell/hover your mouse over them



Other Common Functions

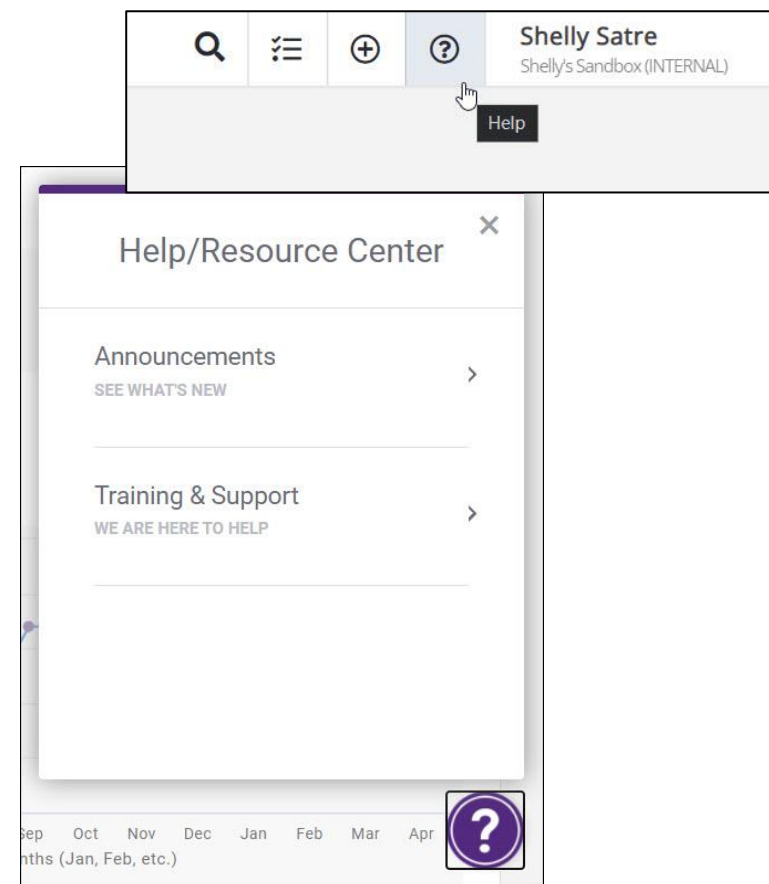
- Clicking the purple Actions icon on a page will display a list of the command tasks performed in the module
- Tasks will vary per module



Other Common Functions

Help

- Accessible via the  in the header bar- this links directly to the Knowledge Base and can search for answers, submit a ticket, etc.
- A numbered link on the help button in the lower right corner indicates that there are new software developments for your review: 



GrowthZone: Modules



Grow Faster – Acquire New Members

Lists/Committees

Communications

Contact Management

Membership Management

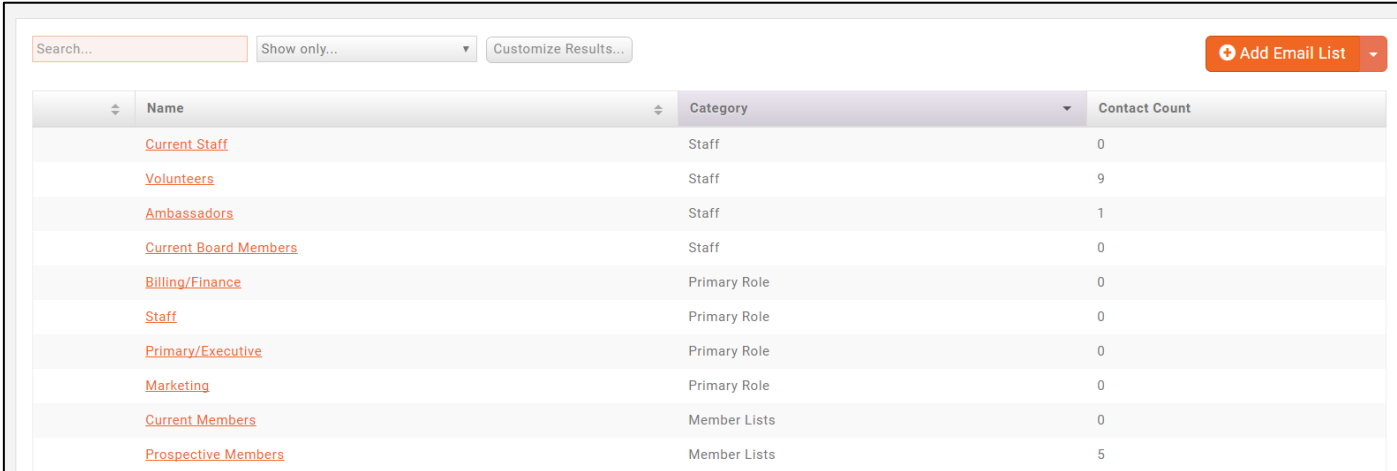
Chapters*

Sales Funnel*

* Require additional module subscription

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 displays a web interface for managing lists and committees. At the top, there is a search bar, a 'Show only...' dropdown menu, and a 'Customize Results...' button. On the right side, there is an 'Add Email List' button with a plus icon and a dropdown arrow. Below these elements is a table with the following columns: 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

Communications

Templates

Categorization

Automated Messaging/Notifications

Individual/Group Emails

E-mail Receipt Tracking

The screenshot shows a web-based interface for editing a communication template. It includes the following fields and elements:

- Name:** A text input field containing "New Member Welcome Letter".
- Description:** A text input field containing "Email sent to the contacts of a new membership".
- Category:** A dropdown menu with "Member Communication" selected.
- Subject:** A text input field containing "Welcome to Gulf Coast Chamber of Commerce".
- Template Text:** A rich text editor area containing:
 - A toolbar with various formatting options (bold, italic, underline, strikethrough, subscript, superscript, font color, text color, bulleted list, numbered list, link, unlink, insert merge field, signatures).
 - Two merge fields: `{{ OwnerName }}` and `{{ OrganizationName }}`, both highlighted in yellow.
 - Two paragraphs of placeholder text:

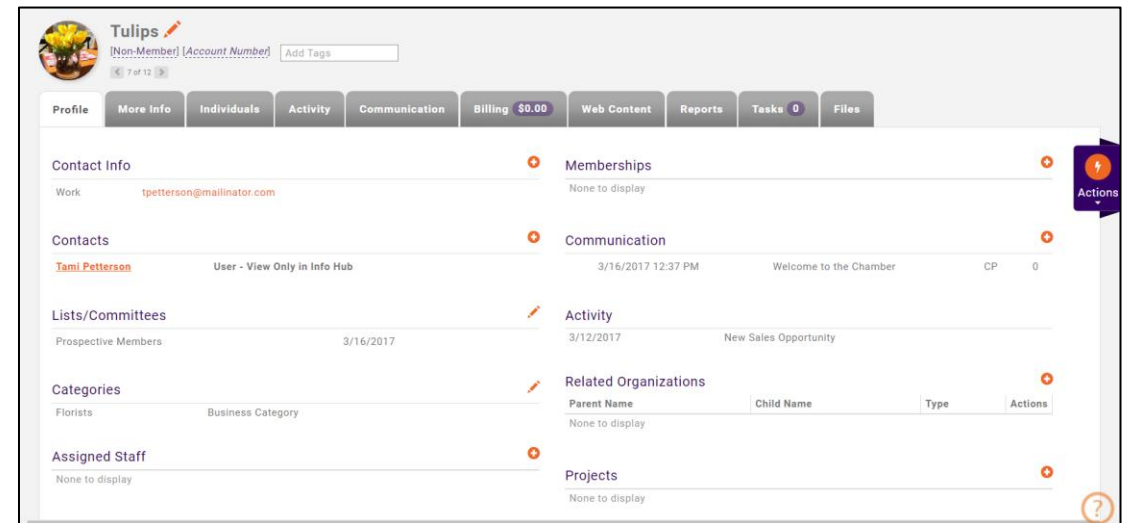
Welcome to Gulf Coast Chamber of Commerce! The Gulf Coast Chamber of Commerce has been an important part of the Ocean Springs/Gulfport/Biloxi community since 1969, providing many social and charitable opportunities for its members.

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:** A text input field containing "cherl.petterson@micronetonline.com".
- Make Available to All Users:** A checkbox that is checked.

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



Membership Management

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*

Sales Funnel*

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

Buttons: Delete, Cancel, 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: None Selected

Sales Source: None Selected

Sales Stages: 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					

Chapters*

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*

* Require additional module subscription

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

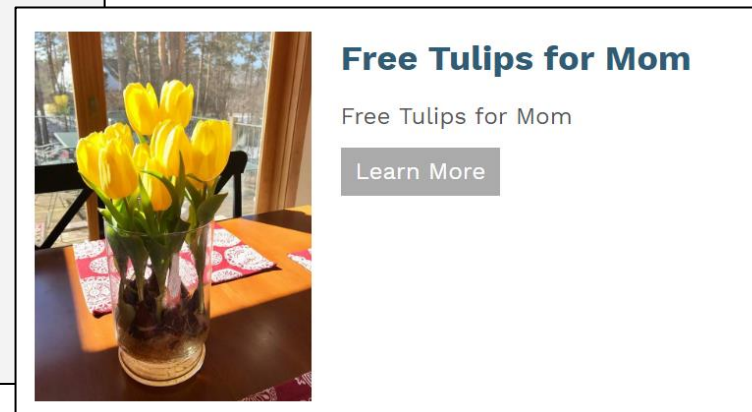
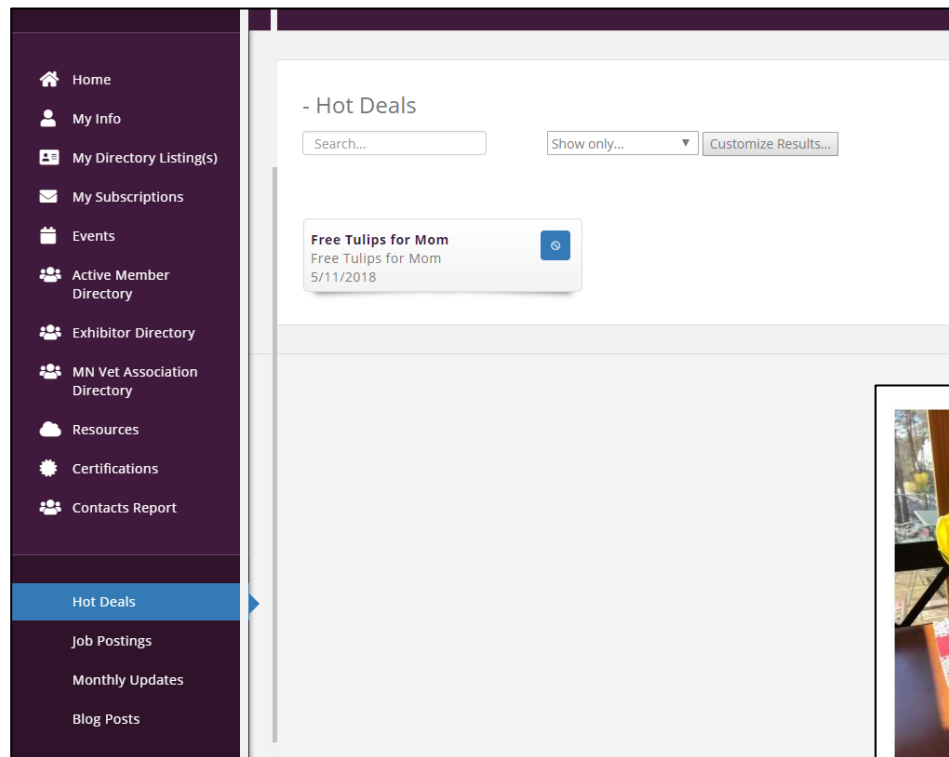
Info Hub

- *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 displays the member portal interface. On the left is a dark blue navigation sidebar with icons and text for: Home, My Info, My Directory Listing(s), My Subscriptions, Events, and Active Member Directory. The main content area has a dark blue header with a search icon and a settings gear. Below the header, a white box contains a welcome message: "Welcome to your member connection and resource center!" followed by instructions on how to use the directory and account features. A "Cher's Sandboxes" link is visible below the message. To the right, an "UPCOMING EVENTS" section lists four events with dates, times, and "Register" buttons. At the bottom right, a "REFER OTHERS" section asks if the user knows someone who would benefit from being a member, with a "Refer them today!" button.

Web Content*

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



Events Expo Module*

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

Sponsors/Ads*

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

Edit Advertisement < 1 of 2 > [Print] [Close]

Contact: Cheri Petterson

Description: Ad for Cheri Petterson

Start Date: 2/12/2018

End Date: 7/27/2019

Advertisement Url: www.growthzone.com

Open In New Window:

Advertisement List

Advertising Type: Full Banner

Image:

Buttons: Delete, Cancel, Done

Fundraising*

Help the community with fundraising campaigns and track donations

The screenshot displays the GrowthZone fundraising software interface. The main view is for a campaign titled "Special Olympics". The interface includes a navigation menu with tabs for "Summary", "Donation Activity", "Recurring", "Donors", and "Donation Setup". The "Summary" tab is active, showing "General Information" and "Donation Statistics".

General Information:

- Campaign Name: Special Olympics
- Campaign Status: [Blank]
- Start Date: 3/ [Blank]
- End Date: [Blank]
- Description: Support Special O [Blank]
- Primary Contact: Brand [Blank]

Donation Statistics:

- Number of Donations: 2

Donation List:

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




Store*

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

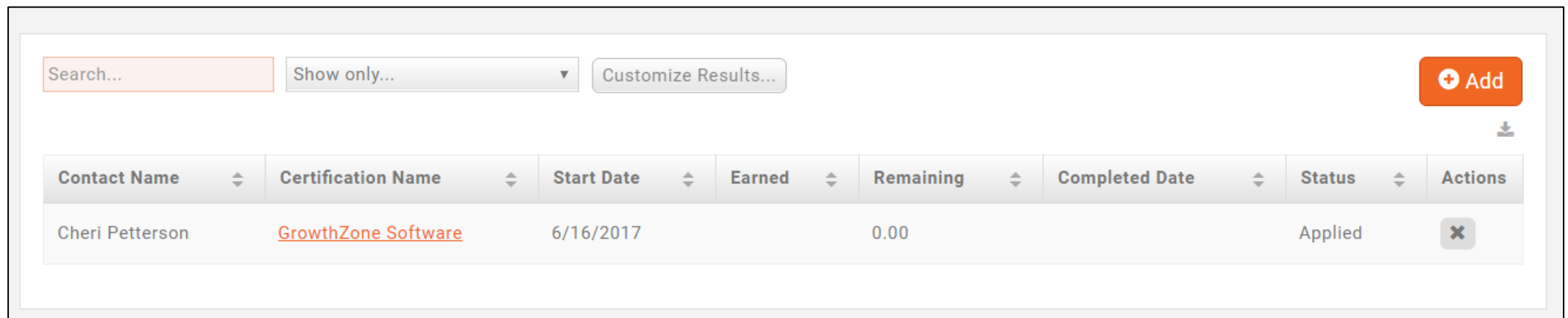
Welcome to our Store.... find all of your lakes logo gear at the tip of your fingers

 <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>
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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 displays the user interface for the Continuing Education module. It features a search bar, a filter dropdown, and a 'Customize Results...' button. A table lists the following record:

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

Do More with Less Time

Billing

Reporting

Forms/Surveys*

Project Management*

Marketing Automation*

* Require additional module subscription

Billing

- *Easy creating of invoices*
- *Accepting Payments*
- *GrowthZone Pay*

The screenshot displays the GrowthZone Billing dashboard. At the top, there are navigation tabs: Overview, Pending Delivery, Payments, Invoices, Upcoming Billing, Upcoming Recognition, Deposits, Credit Memos, and Accounting Summary. The 'Overview' tab is selected.

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
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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

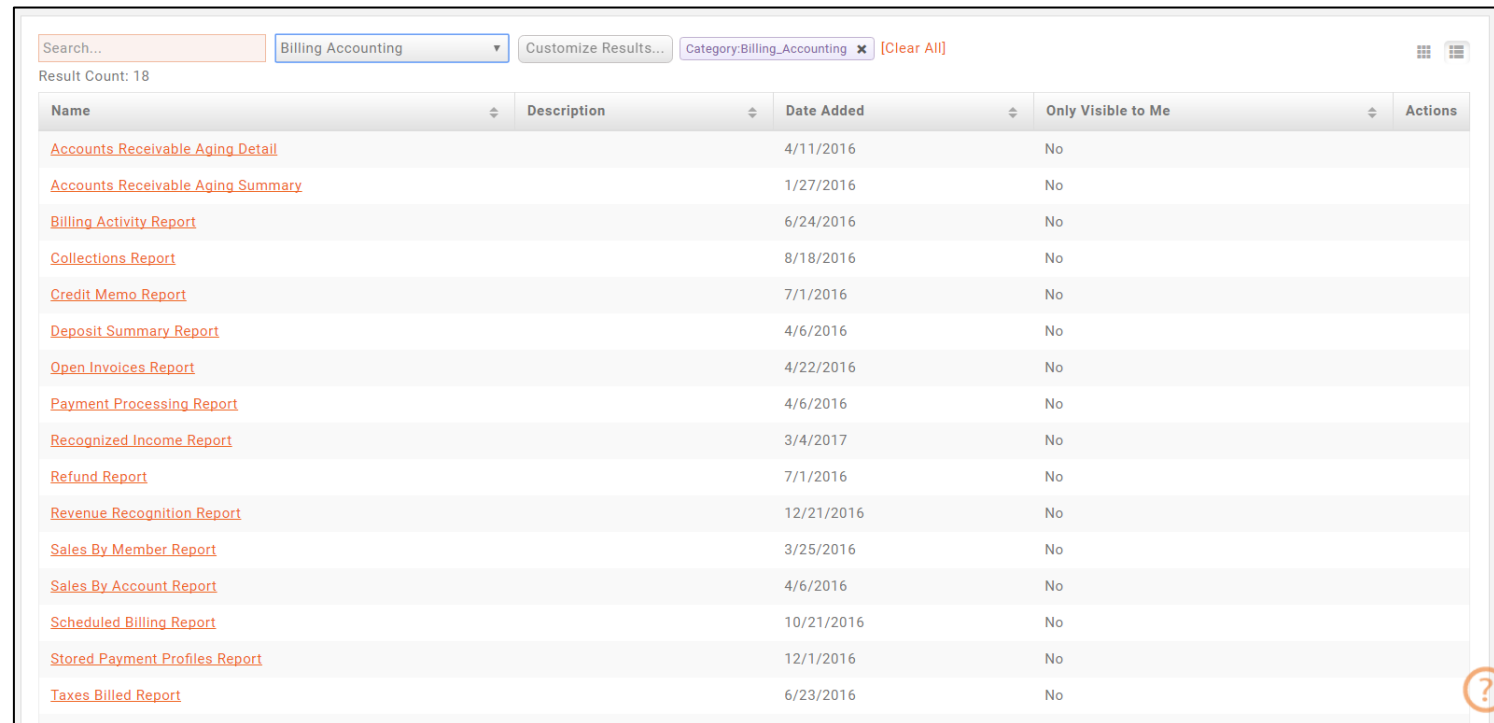
Setup

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

Reporting

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

Customizable to meet your needs



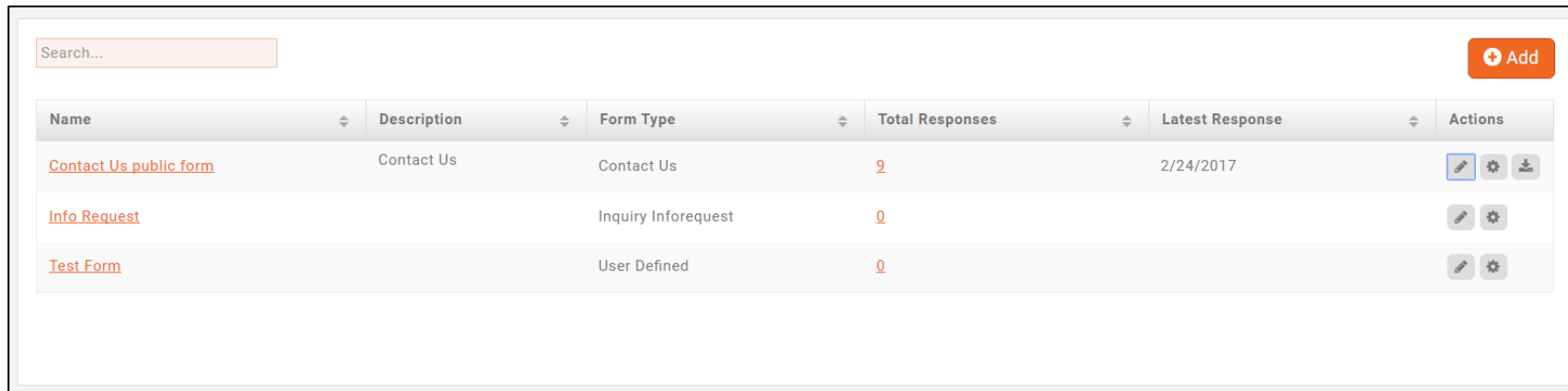
Search... Billing Accounting Customize Results... Category: Billing_Accounting [Clear All]








Result Count: 18

Name	Description	Date Added	Only Visible to Me	Actions
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	

Forms/Surveys*

Use Forms/Surveys to create online forms or insert links into emails to encourage and track responses



Name	Description	Form Type	Total Responses	Latest Response	Actions
Contact Us public form	Contact Us	Contact Us	0	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...

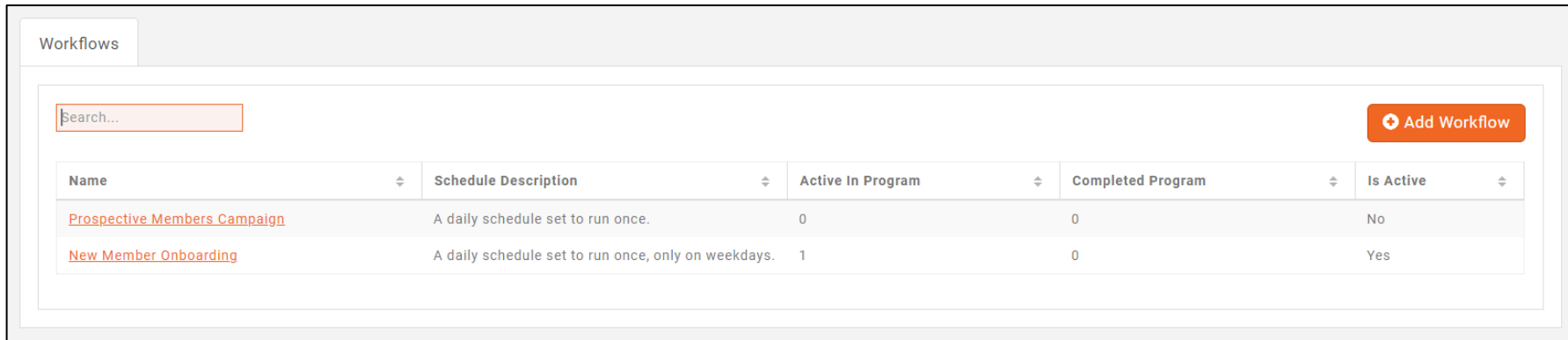


The screenshot displays a software interface for 'New Member On-boarding'. At the top right, there is an 'Add Tags' input field. Below this is a navigation bar with tabs for 'Summary', 'Data', 'Economic Development', 'Tasks', 'Files', and 'Communication'. The 'Tasks' tab is currently selected. In the top right corner of the task list area, there is an orange 'Add' button with a plus sign. The main content is a table with the following columns: Name, Task Priority, Task Type, Contact, Assigned To Person, Due Date, Completed Date, and Percent Complete. There are three rows of tasks listed. To the right of the table is a purple 'Actions' button with a lightning bolt icon.

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 workflow 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?

Training and Support

Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Documentation:

[GrowthZone Knowledge Base »](#)

Training Calendar:

[View Training Event Calendar »](#)

Live Chat:

[GrowthZone Support Portal \(chat on far right\) »](#)