

GrowthZone: 5 Steps to a Simple CE Setup

Agenda

- Overview
- Before you start...
- Let's go!
 1. Create Certification
 2. Set Certification as Default
 3. Create Components
 4. Events and Adding Components
 5. Complete a Component
- Tracking progress
- Reporting

Continuing Education Overview

What is the Continuing Education module?

The Continuing Education module within GrowthZone allows associations to administer, track, and report on the professional certifications of their members. With the proper setup, associations can save themselves and their members time in managing the courses, exams, and other tasks.

Continuing Education Overview

What is the Continuing Education module?

The module is built so that both simple and complex scenarios can be accommodated. It is important to note that the Continuing Education module does not deliver instruction or coursework, rather, it keeps track of necessary elements and the completion date of each.

Continuing Education Overview

What is the Continuing Education module?

If you do not have GrowthZone's Continuing Education module and are interested in adding it to your subscription, contact [the Engagement Team](#).

Continuing Education Overview

Continuing Education- The Simple Setup

This Continuing Education/Code of Ethics set-up is being built under the following assumptions:

No Fees are being charged for components (courses)
No Objectives are required
No Categories are needed
No prerequisites are required
No Terms & Conditions are necessary
No need to track "completion"- only tracking attendance/hours*

With this simple approach, we are only using a couple key areas of the module.

*At the component level- there may be fees at the event level!

Continuing Education Overview

Continuing Education- The Simple Setup

Many organizations provide a **certificate** to **event attendees** to document **credit** for **completing a component (course)**. This is done by linking a **certification component** to an **event**, which is also tied to the **continuing education certification** created to track **ongoing continuing education**. The **credits** and **certificates** are **tracked** within the Database and are visible to the member in the Info Hub.

Before you start...

There are a few things you may want to consider before creating your continuing education program:

- Custom Fields
- Document Generation
 - Component Certificate Template
 - Roster
- Automated Messaging

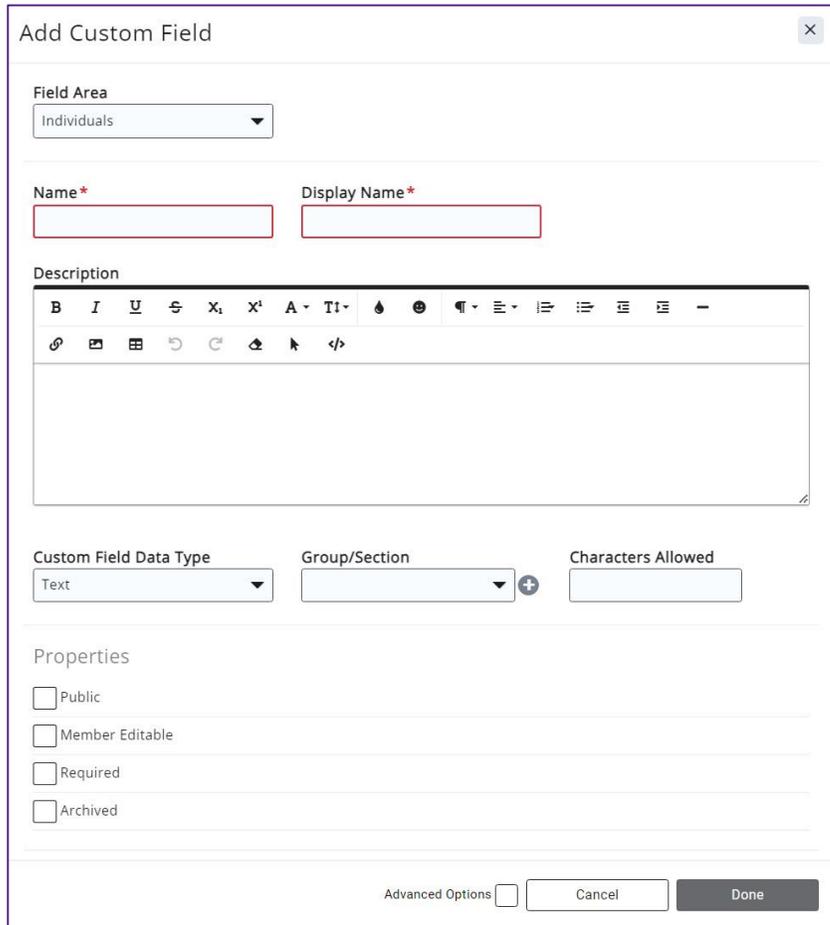
Before you start... Custom Fields

Some organizations need to include a License Number or some other unique identifier on certificates. There are 2 options for custom fields:

- **Individual Custom Field:** is included in the contact record and can be visible/updateable in the Info Hub.
- **Event Custom Field:** is related to a specific event (class), and can be reported on, but is not tied to a contact record and cannot be added to a certificate.

GZ Knowledge Base: [Custom Fields](#)

Before you start... Custom Fields



The screenshot shows the 'Add Custom Field' dialog box with the following fields and options:

- Field Area:** A dropdown menu set to 'Individuals'.
- Name*:** An empty text input field.
- Display Name*:** An empty text input field.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and other text formatting options.
- Custom Field Data Type:** A dropdown menu set to 'Text'.
- Group/Section:** An empty dropdown menu with a plus sign icon.
- Characters Allowed:** An empty text input field.
- Properties:** A section with four checkboxes: 'Public', 'Member Editable', 'Required', and 'Archived', all of which are currently unchecked.
- Advanced Options:** A checkbox that is currently unchecked.
- Buttons:** 'Cancel' and 'Done' buttons at the bottom right.

Individual Custom Fields can be enabled for use in event registration in the [Event Settings Defaults](#).

These fields will need to be set up in advance using **Individuals** as the field area.

- Name/Display Name: these should be the same, no symbols
- Properties: **Public** and **Member Editable** should be selected. **Required** is optional.

Before you start... Document Generation

There are several templates GrowthZone uses within the Continuing Education module. They are included in your subscription and can be used “as is” or they can be copied and customized as needed.

- Certificate Templates (not discussed in today’s session)
- Component Certificate Templates
- Roster Templates

GZ Knowledge Base : [Setting up Document Templates](#)

Before you start... Document Generation

Component Certificate Templates

Many customers provide a certificate to event attendees to document the credit that attendees receive for completing a class. This is done by linking a component to an event and having a component certificate template linked to the component. Component certificates must be set up as a Certificate Component-type document template to be available.

GZ Knowledge Base : [Setting up Document Templates](#)

Before you start... Document Generation

Mailing Address: _____ Location: _____



DEPARTMENT OF PROFESSIONAL & FINANCIAL REGULATION
CERTIFICATE OF COMPLETION

The Provider Shall: Furnish a copy of this form to the student.
Students/Licensee: If you are applying for Continuing Education Credits this form must be **MAINTAINED** in your files. **DO NOT SUBMIT TO THE BUREAU OF INSURANCE** unless you are requested to do so to correct a discrepancy in our files.
Providers: Submit a Course Roster to the Bureau of Insurance. Please **DO NOT** include names of students taking the course for Pre-Licensing Education Credit.

Provider Name: _____ Provider #: 6
Course Number: _____ Date of Course: _____

Course Title: _____
Location: Webinar
Total Credit Hours Earned: 3.00
License # _____

Name of Student: _____
Address: _____

I certify that the person named above has completed the above course.

Signed: _____ Telephone # _____
Approved Signature of Provider Official
Date: _____

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Access the component certificate template in Setup -> Document Generation Templates -> ContinuingEducationUnit.docx, or create your own.

See [Continuing Education/Certificates Merge Fields](#) for available merge fields for use in Component Certificate Templates.

Before you start... Document Generation

Roster Templates

Many certifying bodies like state governments and national organizations require proof that an individual has attended a training class. In GrowthZone, you can create rosters for events that are linked to certification components by using the Mail Merge option on the **Continuing Education Roster Report**.

GZ Knowledge Base: [Setting up Document Templates](#)

Before you start... Document Generation

Roster Templates

GrowthZone has a template called **CertificationRoster.docx**. You can make a copy of this document and edit it or upload your own file using merge fields.

See [Continuing Education/Certificates Merge Fields](#) for available merge fields for use in Component Certificate Templates.

Before you start... Automated Messaging

Automatic messages may be configured to be sent in response to certain actions. For example, an automated message may be sent to a member when they complete a component by attending an event. Your database is pre-configured with automatic messages, which you may use "as-is" or customize to meet your needs.

GZ Knowledge Base: [Automated Messaging](#)

Before you start... Automated Messaging

- The following automated message templates should be reviewed, customized if needed, and set for delivery:
 - ✓ Registered Event Attendee
 - ✓ Unregistered Event Attendee
 - ✓ Certification Component Completed

- GZ Knowledge Base: [Automated Messaging](#)

1. Create a Certification

Certification Checklist:

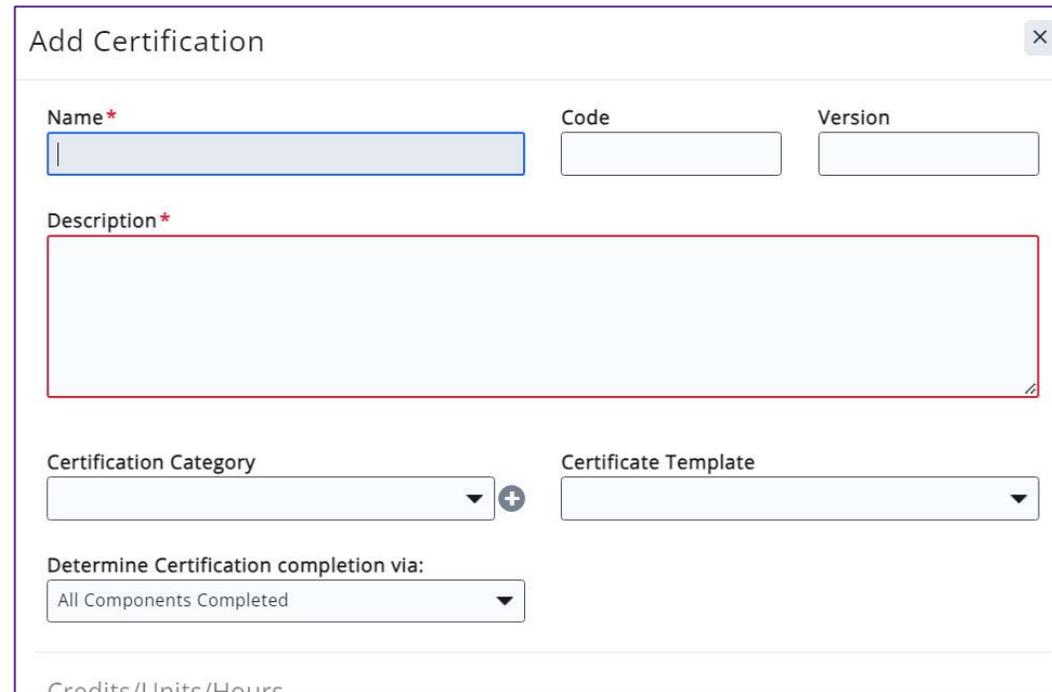
- ✓ Certification Name:
Continuing Education or Ongoing Continuing Education
- ✓ Description:
Continuing Education or Ongoing Continuing Education
- ✓ Determine Certification completion via:
Do Not Track Completion*

*We are only tracking ongoing continuing education; the certification itself will not be completed.

GZ Knowledge Base: [Add a Certification](#)

1. Create a Certification

Because of the simple set-up, we are not using most of the fields within this area. The key details such as the certificate template, credits, etc., will be set-up within the components.



The screenshot shows a web form titled "Add Certification" with a close button (X) in the top right corner. The form contains the following fields:

- Name***: A text input field.
- Code**: A text input field.
- Version**: A text input field.
- Description***: A large text area for entering details.
- Certification Category**: A dropdown menu with a plus sign (+) to the right.
- Certificate Template**: A dropdown menu.
- Determine Certification completion via:**: A dropdown menu currently set to "All Components Completed".
- Credits/Units/Hours**: A partially visible field at the bottom of the form.

2. Set Certification as Default

Setup -> Continuing Education -> General Settings

← Setup

Continuing Education General Settings SAVE

Send Expiration Emails n Days Before ⓘ Receives Admin Review email ⓘ + Default Certificate Template

Default Certification Enroll Attendees To All Relevant Certifications

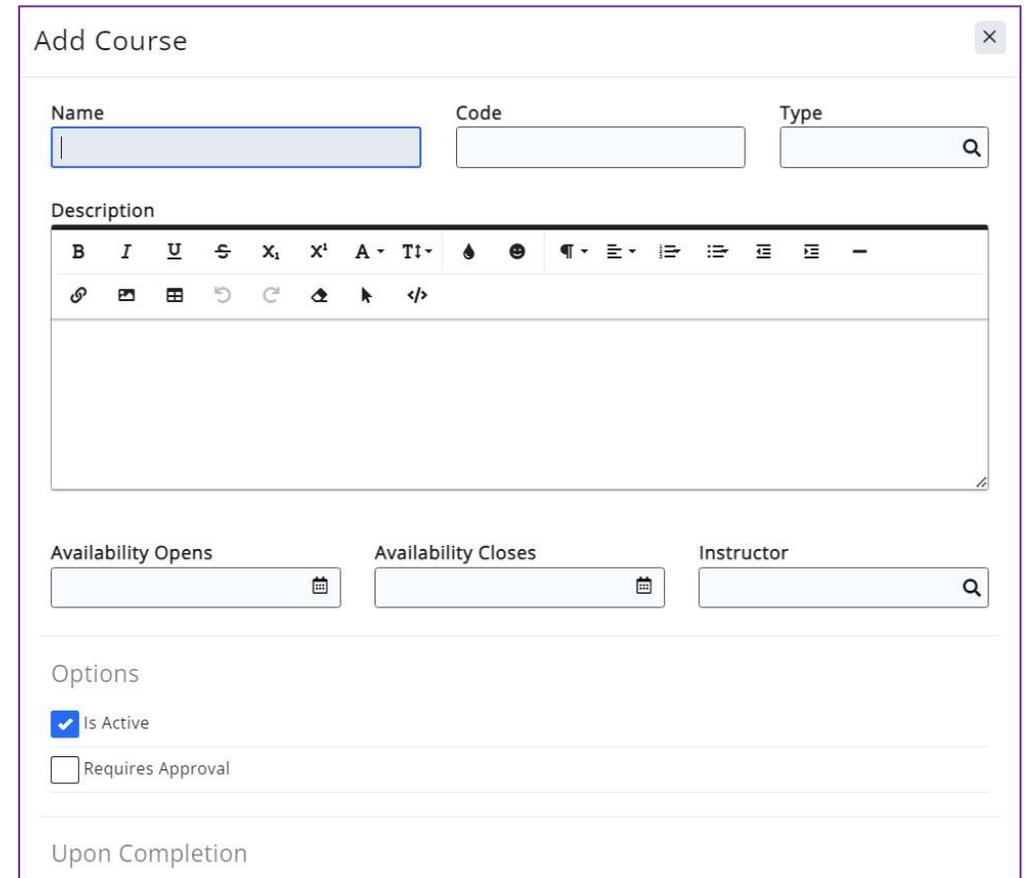
ip?

GZ Knowledge Base : [Continuing Education General Settings](#)

3. Create Components

Components are individual items that count towards the continuing education. For most users, components are typically **courses**, and are not tying in exams, tasks, or objectives. GrowthZone subscribers providing a certificate for each course must link their created certificate component template to the individual components.

GZ Knowledge Base: [Add a Component](#)



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

- Name:** A text input field.
- Code:** A text input field.
- Type:** A dropdown menu with a search icon.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, subscript, superscript, text color, background color, bulleted list, numbered list, indent, and outdent. Below the toolbar is a large text area for the description.
- Availability Opens:** A date picker field.
- Availability Closes:** A date picker field.
- Instructor:** A dropdown menu with a search icon.
- Options:**
 - Is Active
 - Requires Approval
- Upon Completion:** A section header for additional options.

3. Create Components

The screenshot shows the 'Add Course' form with the following fields highlighted in red boxes:

- Name
- Is Active
- Hours Earned
- Credits Earned
- Document Template
- Component Of (Type: Certification, Name: Ongoing Continuing)

Because we are keeping things simple in relation to tracking, many fields are not used but the following should be completed:

- ✓ **Name** – Enter the course name for component.
- ✓ **Is Active:** should be enabled by default, but needs to be checked in order for the component to be used.
- ✓ **Hours Earned OR Credits Earned** – Enter the hours or credits received for attendance.
- ✓ **Documentation Template** – Attach component certificate template created/customized previously.
- ✓ **Component Of** – This must be attached by selecting your Continuing Education Certification. (If default certification is selected in General Settings, this will automatically populate.) **If not attached to a certification, attendees will not be enrolled or receive credit.**

4. Events and Adding Components

Additional Attendee Setup Options:

- [Registration Form Settings](#)
- [Custom Fields](#)
- Registration Types: [Free](#), [Simple Paid](#), [Table/Team](#), [Advanced](#)
- [Registration Discounts](#)
- [Additional Items](#)
- [Instructions and Confirmation Messaging](#)

4. Events and Adding Components

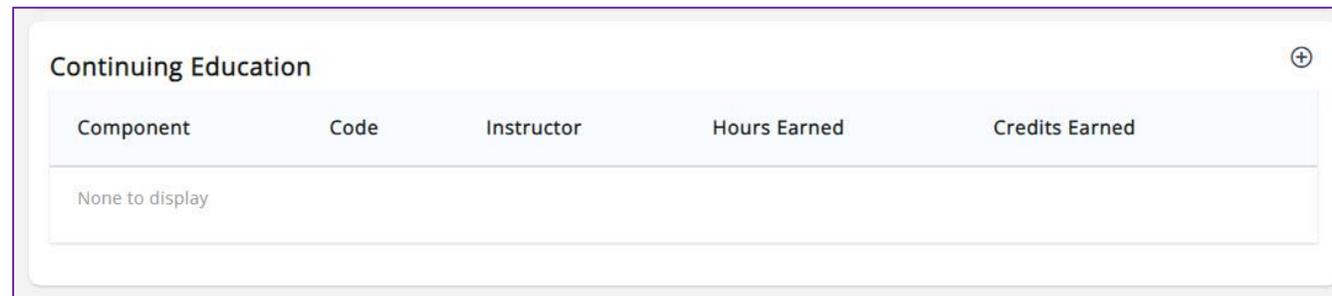
Custom Fields

Individual Custom Fields: If using the individual custom fields you must ensure that 'Is for Attendee' is selected as an additional property and applied to specific registration types under advanced settings.

Event Custom Fields: Any event specific custom fields can be tied to registration and pulled into event reporting for specific event. These custom event fields can be tracked via reports but will not merge into event certificates.

4. Events and Adding Components

Once the event is created, you can attach the appropriate component to it on the Overview tab. This will pull in the component, code, instructor, and hours or credits that will be earned.



| Component | Code | Instructor | Hours Earned | Credits Earned |
|-----------------|------|------------|--------------|----------------|
| None to display | | | | |

Alternatively, you can create a new component from within the event by clicking the “+” and filling out the required fields.

5. Complete a Component

Marking the attendee as “Attended” in that event will mark that component as completed.

| Reg. Id | First Name | Last Name | Organization | Attendee Status | Ref # | Registration Type | Table/Team Name | Additional Items | Match | Actions |
|----------|------------|-----------|---------------------|-----------------|-------|-------------------------------|-----------------|------------------|-------|---------|
| 10214746 | Abby | Normal | Crooked Lake Coffee | Attended | 704 ✓ | Single Attendee (Afternoon... | | 1 | | ... |

Certification Type Name: Cycle 7 CE

Certification Status: In progress

Started: 7/19/2023

Completed On: [] Expires: []

Hours Earned: 4.00

Credits Earned: 0.00

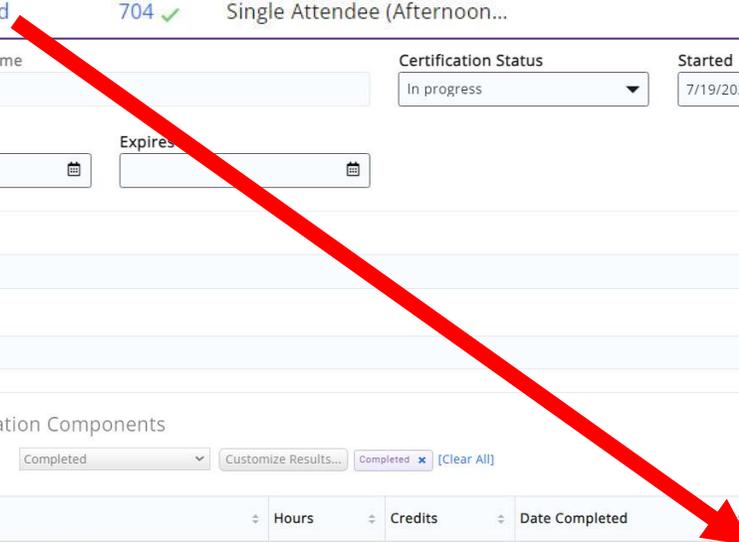
Continuing Education Components

Search... [Completed] Customize Results... [Completed] [Clear All]

| Type | Name | Hours | Credits | Date Completed | Completed |
|--------|-----------------------------|-------|---------|----------------|-----------|
| Course | Code of Ethics - Continuing | 4 | | 12/23/2023 | ✓ |

Files: [Download document for Golf and Learn Expo December 2023 Code of Ethics - Continuing](#)

Buttons: Delete, Cancel, Done



5. Complete a Component

Alternatively, you can enter Component/Certification Results for individuals via the Tracking tab, or in bulk on the Bulk Entry tab.

Continuing Education

Overview **Tracking** Certifications Components Objectives Bulk Entry

Search: shelli

| Contact Name | First Name | Last Name | Certification Name | Start Date | % Complete | Hr | Cr | Completed Date | Expiration Date | Status | Actions |
|--------------|------------|-----------|---------------------------|------------|------------|------|----|----------------|-----------------|-------------|---------|
| Shelli March | Shelli | March | Cycle 7 CE | 7/19/2023 | 0 | 2.50 | 0 | | | In Progress | ✓ ✕ |
| Shelli March | Shelli | March | Code of Ethics 2023 | 2/17/2023 | 0 | 0 | 0 | | | In Progress | ✓ ✕ |
| Shelli March | Shelli | March | Instructor Level 1 | 1/16/2023 | 0 | 0 | 0 | | | In Progress | ✓ ✕ |
| Shelli March | Shelli | March | New Certification Program | 9/23/2022 | 0 | 4 | | | | In P | |
| Shelli March | Shelli | March | NIADA Certification | 3/31/2022 | 0 | 0 | 0 | | | In P | |
| Shelli March | Shelli | March | Code of Ethics 2022 | 4/28/2021 | 0 | 0 | 0 | 4/28/2021 | | Act | |
| Shelli March | Shelli | March | Continuing Ed Program | 3/15/2021 | 13 | 0 | 0 | | | In P | |

1 - 7 TOTAL: 7

Continuing Education

Overview Tracking Certifications Components Objectives **Bulk Entry**

Search... Components: Code of Ethics - Continuing

| Contact Name | Type | Component Name | Description | Code | Certification |
|-------------------|--------|-----------------------------|-------------|------|---------------|
| Shelli March | Course | Code of Ethics - Continuing | | BPP | Cycle 7 CE |
| Michael Carpenter | Course | Code of Ethics - Continuing | | BPP | Cycle 7 CE |
| Walter Butters DR | Course | Code of Ethics - Continuing | | BPP | Cycle 7 CE |

1 - 3 TOTAL: 3

Tracking Progress

When a component is completed, attendees will receive:

- An email with their certificate attached (after being marked as attended by staff)
- Access to their certificates in the Info Hub

The screenshot displays a web interface for continuing education. At the top, there are tabs for 'Overview' and 'Search Continuing Education Catalog'. Below this, a section titled 'MY CONTINUING EDUCATION' contains a table with the following data:

| CERTIFICATION | STATUS | START | COMPLETE | HOURS | CREDITS |
|------------------------------|-------------|-----------|----------|-------|---------|
| Ongoing Continuing Education | In Progress | 12/1/2019 | | 59 | 12 |

Overlaid on the right is a modal window titled 'Certification Component Downloads'. It lists the following files for download:

- Download document for The Dirty Dozen WEBINAR
- Download document for Farm Vehicles and Equipment Coverage WEBINAR (0 Bytes)
- Download document for Homeowners Hot Topics...What You Need to Know WEBINA (0 Bytes)
- Download document for Life Insurance...Benefits for the Living WEBINAR (0 Bytes)
- Download document for ACSR #2 - Personal Automobile Insurance (0 Bytes)
- Download document for Dispelling the Myths of Workers' Compensation (0 Bytes)
- Download document for Personal Auto Hot Topics...What You Need to Know WEBINAR Personal Auto Hot Topics... What You Need to Know WEB (0 Bytes)
- Download document for Cyber Liability WEBINAR Cyber Liability WEBINAR (0 Bytes)
- Download document for E&O Roadmap to Homeowners Insurance WEBINAR E&O Roadmap to Homeowners Insurance WEBINAR (0 Bytes)
- Download document for Ethically Speaking Ethically Speaking (0 Bytes)

A 'Close' button is located at the bottom right of the modal window.

Tracking Progress

You can track any/all contact's progress on the **Tracking** tab within the Certifications module.

Continuing Education

Overview **Tracking** Certifications Components Objectives Bulk Entry

shelli

| Contact Name | First Name | Last Name | Certification Name | Start Date | % Complete | Hr | Cr | Completed Date | Expiration Date | Status | Actions |
|--------------|------------|-----------|---|------------|------------|------|----|----------------|-----------------|-------------|---------|
| Shelli March | Shelli | March | Cycle 7 CE | 7/19/2023 | | 2.50 | 0 | | | In Progress | ✓ x |
| Shelli March | Shelli | March | Code of Ethics 2023 | 2/17/2023 | 0 | 0 | 0 | | | In Progress | ✓ x |
| Shelli March | Shelli | March | Instructor Level 1 | 1/16/2023 | 0 | 0 | 0 | | | In Progress | ✓ x |
| Shelli March | Shelli | March | New Certification Program | 9/23/2022 | | 0 | 4 | | | In Progress | ✓ x |
| Shelli March | Shelli | March | NIADA Certification | 3/31/2022 | 0 | 0 | 0 | | | In Progress | ✓ x |
| Shelli March | Shelli | March | Code of Ethics 2022 | 4/28/2021 | | 0 | 0 | 4/28/2021 | | Active | ⋮ |
| Shelli March | Shelli | March | Continuing Ed Program | 3/15/2021 | 13 | 0 | 0 | | | In Progress | ✓ x |

< 1 - 7 > TOTAL: 7

Need Help?

Tracking Progress

You can also view a contact's progress and access their certificates via the Overview tab of their contact record.

Overview More Info Activity Communication Billing Setup Billing **\$1,340.00** Tasks Engagement Files

Billing

| | | | | |
|--|--|---|---|-------------------------------------|
| 1 | \$1,340.00 | 0 | 0 | None |
| SCHEDULED BILLINGS Next Bill Date: 3/20/2023 VIEW/UPDATE | BALANCE Remaining: \$0.00 Credits: \$0.00 VIEW/PAY | BILLING NOTES Last Date VIEW/UPDATE | PAYMENT PROF. Last Date VIEW/UPDATE | TAX SET Tax Exempt: No UPDATE |

Contact Info 2

Work: shelli.march@mailinator.com
Other: shelli.march@mailinator.com

Continuing Education

| Name | Status | Start date | Completed date | Hr | Cr | % Complete |
|---|-------------|------------|----------------|------|----|------------|
| Code of Ethics 2022 | Active | 4/28/2021 | 4/28/2021 | 0 | 0 | |
| Code of Ethics 2023 | In Progress | 2/17/2023 | | 0 | 0 | |
| Continuing Ed Program | In Progress | 3/15/2021 | | 0 | 0 | 13 |
| Cycle 7 CE | In Progress | 7/19/2023 | | 2.50 | 0 | |
| Instructor Level 1 | In Progress | 1/16/2023 | | 0 | 0 | |
| New Certification Program | In Progress | 9/23/2022 | | 0 | 4 | |
| NIADA Certification | In Progress | 3/31/2022 | | 0 | 0 | |

Forms/Surveys 1

| Name | Date Completed | Contact |
|-----------|----------------|--------------|
| Form 2022 | 2/16/2022 | Shelli March |

Edit Certification Contact Enrollment

Certification Type Name: Cycle 7 CE
Certification Status: In progress
Started: 7/19/2023

Completed On:
Expires:

Hours Earned: 4.00
Credits Earned: 0.00

Continuing Education Components

Search... Completed Customize Results... Completed [Clear All]

| Type | Name | Hours | Credits | Date Completed | Completed |
|--------|-----------------------------|-------|---------|----------------|-----------|
| Course | Code of Ethics - Continuing | 4 | | 12/23/2023 | ✓ |

Files

[Download document for Golf and Learn Expo December 2023 Code of Ethics - Continuing](#)

Delete Cancel Done

Reporting

Reports to help you view and analyze status of your certifications are available on the Certifications **Overview** tab.

Continuing Education

Overview Tracking Certifications Components Objectives Bulk Entry

Continuing Education

Continuing Education Activity

| Contact Name | Parent Certification Name | Description | Activity | Date |
|-------------------------------|-----------------------------------|---|----------------|------------|
| Abby Normal | Cycle 7 CE | Course Code of Ethics - Continuing Completed | Completed | 12/23/2023 |
| Fergus Fraser | New Certification | Registered for event Golf and Learn Expo September 2023 for certification New | Registered for | 8/21/2023 |

Action Required

| Contact Name | Certification or Component Name | Description | |
|-------------------------------|--|--|---|
| Amanda Lorean | Ongoing Continuing Education | Requires Approval of Next Component to Proceed | ✓ |

Upcoming Continuing Education Events

| Event Date | Name | |
|------------|---|------------------|
| 11/4/2023 | Monica's Camping Adventure | Add Registration |
| 12/23/2023 | Golf and Learn Expo December 2023 | Add Registration |

Common Tasks

- [Enroll a contact](#)
- [Print a Roster](#)
- [View Cohorts](#)

Reports

- [Continuing Education Progress Report](#)
- [Continuing Education Individual Report](#)
- [Continuing Education Summary Report](#)
- [Roster Report](#)

Setup

- [General Settings](#)
- [Terms/Conditions](#)
- [Fees](#)
- [Cohorts](#)

Reporting

The Continuing Education Progress Report will provide an understanding of how an individual contact, or multiple contacts are progressing towards certification or participation in continuing education programs. The report may be filtered to a specific certification program, certification component, status, etc.

Results: 15

| Contact Name | Default Email | Default Phone | Certification Type Name | Certification Code | Certification Status | Certification Category | Enrollment Date | Expiration Date | Component Name | Component Code | Component Type | Completion Status | % Completed |
|-------------------|---------------------------------|---------------|-------------------------|--------------------|----------------------|------------------------|-----------------|-----------------|-----------------------------|----------------|----------------|----------------------|-------------|
| Abby Normal | abby.normal@mailinator.com | 218-456-1258 | Cycle 7 CE | | In Progress | | 7/19/2023 | | Cycle 7 COEC | | Course | | 33 |
| Abby Normal | abby.normal@mailinator.com | 218-456-1258 | Cycle 7 CE | | In Progress | | 7/19/2023 | | Code of Ethics - Continuing | BPP | Course | Completed | 33 |
| Abby Normal | abby.normal@mailinator.com | 218-456-1258 | Cycle 7 CE | | In Progress | | 7/19/2023 | | Cycle 7 COEN | | Course | Registered for Event | 33 |
| Michael Carpenter | michaelcarpenter@mailinator.com | 773-554-8636 | Cycle 7 CE | | In Progress | | 7/19/2023 | | Cycle 7 COEC | | Course | | 50 |
| Walter Butters DR | walter.butters@mailinator.com | 630-249-9994 | Cycle 7 CE | | In Progress | | 7/19/2023 | | Cycle 7 COEC | | Course | | 50 |
| Shelli March | shelli.march@mailinator.com | | Cycle 7 CE | | In Progress | | 7/19/2023 | | Cycle 7 COEC | | Course | | 50 |
| Michael | michaelcarpenter@mailinator.com | 773-554- | Cycle 7 CE | | In Progress | | 7/19/2023 | | Code of Ethics - | BPP | Course | | 50 |

Reporting

Using the [Continuing Education Summary Report](#), you can generate a list of all of your certifications and their associated settings (i.e. fees associated to the certification, whether the certification requires approval, number of contacts with active certificates, and so on). This report may be a quick way to verify settings for your certification programs.

Results: 26

| Certification Name | Requires Approval | Price | Fee Item | Component Name | Component Price | Component Fee Item | Component Exam Type | Number Enrolled | Number Enrolled but not completed | Number Active | Number Expired | Number Requiring Approval | Number of Objectives |
|-----------------------|-------------------|-------|----------|---------------------|-----------------|--------------------|---------------------|-----------------|-----------------------------------|---------------|----------------|---------------------------|----------------------|
| Code of Ethics 2022 | No | | | Code of Ethics 2021 | | | | 25 | 15 | | 10 | | |
| Code of Ethics 2023 | No | | | | | | | 2 | 2 | | | | |
| Continuing Ed Program | No | | | Ed Opp 1 | | | | 39 | 39 | | | | |
| Continuing Ed Program | No | | | Test Cert Course 1 | | | | 39 | 39 | | | | |
| Continuing Ed Program | No | | | Test Cert Course 2 | | | | 39 | 39 | | | | |
| Continuing Ed Program | No | | | New Component | | | | 39 | 39 | | | | |
| Cycle 7 CE | No | | | Cycle 7 COEN | | | | 4 | 4 | | | | |

Reporting

The Continuing Education Individual Report provides a way for you to filter to an individual contact or organization, and display all certifications, components and/or objectives the individual has met, as well as completion date.

Continuing Education Individual Report

Contact: Shelli March

Organization: [Search]

Membership Start Date: No Dates Selected

Fields to Display: X Certification Category, X Certification Code, X Certification Status, X Certification Type Name, X Exam Score, X Expiration Date, X Contact Name, X Default Email, 1 more

Display Mode: Detail

Results: 21

| Contact Name | Default Email | Default Phone | Certification Type Name | Certification Code | Certification Status | Certification Category | Expiration Date | Exam Score |
|--------------|-----------------------------|---------------|---------------------------|--------------------|----------------------|------------------------|-----------------|------------|
| Shelli March | shelli.march@mailinator.com | | New Certification Program | | In Progress | | | |
| Shelli March | shelli.march@mailinator.com | | New Certification Program | | In Progress | | | |
| Shelli March | shelli.march@mailinator.com | | Continuing Ed Program | | In Progress | | | |

Reporting

Many certifying bodies like state governments and national organizations require proof that an individual has attended a training class. In GrowthZone, you can create rosters for events that are linked to certification components by using the Mail Merge option on the Roster Report.

The screenshot shows the 'Continuing Education Roster Report' interface. The 'Certification Component' is set to 'Code of Ethics - Continuing'. The 'Start Date Between' is set to 'Jan 1, 2023 - Dec 31, 2023'. The 'Event' field is empty. The 'Additional Criteria / Filters' section is expanded. The 'Display Options' section is visible. The 'Fields to Display' section shows 'Contact Name', 'Default Email', 'Default Phone', and 'Primary Business'. The 'Summarize By' section is set to 'Detail'. The 'Display Mode' is set to 'Detail'. A dropdown menu is open, showing options: 'Export as PDF', 'Export as Excel', 'Export Summary as Excel', 'Export Summary as PDF', 'Email Report', 'Add to List', 'Mailing Labels', 'MailMerge', 'Save As New Report...', and 'Add as Favorite Report'. The 'MailMerge' option is highlighted. A 'RUN REPORT' button is visible in the top right corner. A 'Need Help?' button is visible in the bottom right corner.

Reporting

Event Attendees Report RUN REPORT

Date Range: Jan 1, 2023 - Dec 31, 2023
 Event Category:
 Calendar:
 List:
 Event:
 Display Only Contacts
 Attendee Registration Status:
 Contact:
 Additional Criteria / Filters:
 Attendee Name,
 Is Not Empty
 Display Options:
 Fields to Display:
 Attended Count, Individual Purchase Amount, Paid Fees, Paid Registrations, Registered Count, Registration Status, Registration Type, Unpaid Fees, 3 more
 Summarize By:
 Attendee Name
 Display Mode:
 Detail Display Summary Count

Results: 154 Page 1 of 2

| Attendee Name | Primary Membership Status | Registration Status | Registered Count | Attended Count | Paid Registrations | Paid Fees | Unpaid Registrations | Unpaid Fees | Individual Purchase Amount | Registration Type |
|-----------------------|---------------------------|---------------------|------------------|----------------|--------------------|-----------|----------------------|-------------|----------------------------|----------------------------------|
| Aaron Ashmore | | | | | | | | | | |
| | Courtesy | Attended | 0 | 1 | 0 | \$0.00 | 1 | \$0.00 | \$6.00 | Table Registration |
| | Courtesy | Registered | 1 | 0 | 0 | \$0.00 | 0 | \$0.00 | \$0.00 | Staff Registration |
| | Courtesy | Canceled | 0 | 0 | 1 | \$175.00 | 0 | \$0.00 | \$175.00 | Individual Golfer - Member |
| | Courtesy | Registered | 1 | 0 | 0 | \$0.00 | 0 | \$0.00 | \$0.00 | |
| | Courtesy | Registered | 1 | 0 | 0 | \$0.00 | 0 | \$0.00 | \$0.00 | Single Attendee (Morning Golf) |
| Aaron Ashmore Count 5 | | | 3 | 1 | 1 | \$175.00 | 1 | \$0.00 | | |
| Abby Normal | | | | | | | | | | |
| | Active | Canceled | 0 | 0 | 1 | \$0.00 | 0 | \$0.00 | \$0.00 | Attendee |
| | Active | Registered | 1 | 0 | 1 | \$0.00 | 0 | \$0.00 | \$0.00 | Attendee |
| | Active | Registered | 1 | 0 | 1 | \$195.00 | 0 | \$0.00 | \$97.50 | Single Tour Ticket |
| | Active | Attended | 0 | 1 | 1 | \$50.00 | 0 | \$0.00 | \$50.00 | Single Attendee (Afternoon Golf) |
| | Active | Registered | 1 | 0 | 0 | \$0.00 | 0 | \$0.00 | \$0.00 | |
| | Active | Registered | 1 | 0 | 0 | \$0.00 | 1 | \$25.00 | \$25.00 | Single Attendee (Afternoon |

The Event Attendees Report provides information on what events (classes) a contact has attended. It can be filtered and/or summarized by date, category, calendar, list, event, registration status, and more.

Use Case:

Knowledge Base Article

[Continuing Education Use Case: A Simple Setup](#)

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

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