

WEBINAR

What's New with GrowthZone? Real Estate Edition

SEPTEMBER 2020





Clara Navin
Product Manager



Andrew Shipe
Product Manager

Introductions

Meet the Product Team on Today's Webinar

Recent Releases

Additional Proration Options

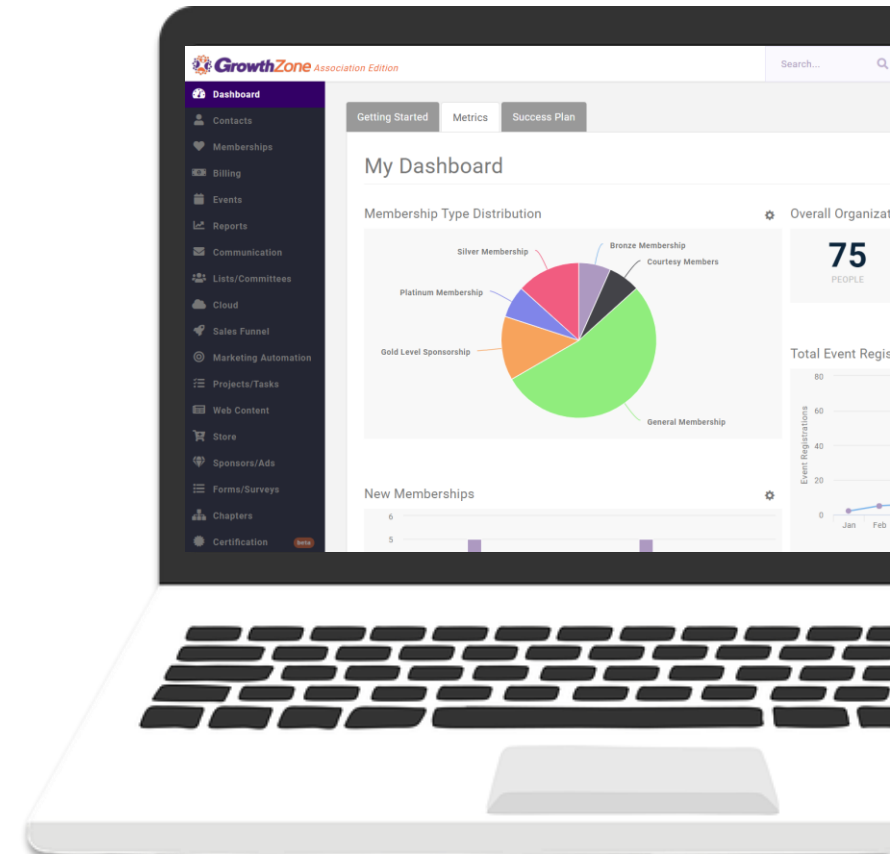
Unpaid Membership Actions/Automations

NRDS Transfer Option

Quick Tips

Closing

Closing Thoughts and Q&A



Recent Releases

ADDITIONAL PRORATION OPTIONS



Andrew Shipe
Product Manager

Membership Proration

Charge your members the right price, no matter when they join.

Proration options available for each membership line item:

- Monthly
- Quarterly
- Semiannual

Build out your proration schedule in GrowthZone, and never worry about new member dues calculations again.

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EXAMPLE MEMBERSHIP SETUP

REALTOR® Association Membership - paid annually

- NAR dues
- State dues
- Local association dues
- Image fee
- RPAC voluntary contribution

MLS Membership - paid semiannually

- MLS charges
- Service fee

Membership Proration

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Build out your proration schedule in GrowthZone, and never worry about new member dues calculations again.

EXAMPLE MEMBERSHIP SETUP

REALTOR® Association Membership - paid annually

- NAR dues - *Prorated monthly*
- State dues - *Prorated quarterly*
- Local association dues - *Prorated quarterly*
- Image fee - *No proration*
- RPAC voluntary contribution - *No proration, flexible contribution*

MLS Membership - paid semiannually

- MLS charges - *Prorated quarterly*
- Service fee - *No proration*

Recent Releases

UNPAID MEMBERSHIP ACTIONS/AUTOMATIONS



Andrew Shipe
Product Manager

Unpaid Member Tab

Save time by managing every step of your renewal process from one place.

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EXAMPLE RENEWAL PROCESS:

- Renewals sent:
- Renewals due:
- Late fee:
- Re-activation fee and suspend:
- Drop member:

Unpaid Member Tab

Save time by managing every step of your renewal process from one place.

EXAMPLE RENEWAL PROCESS:

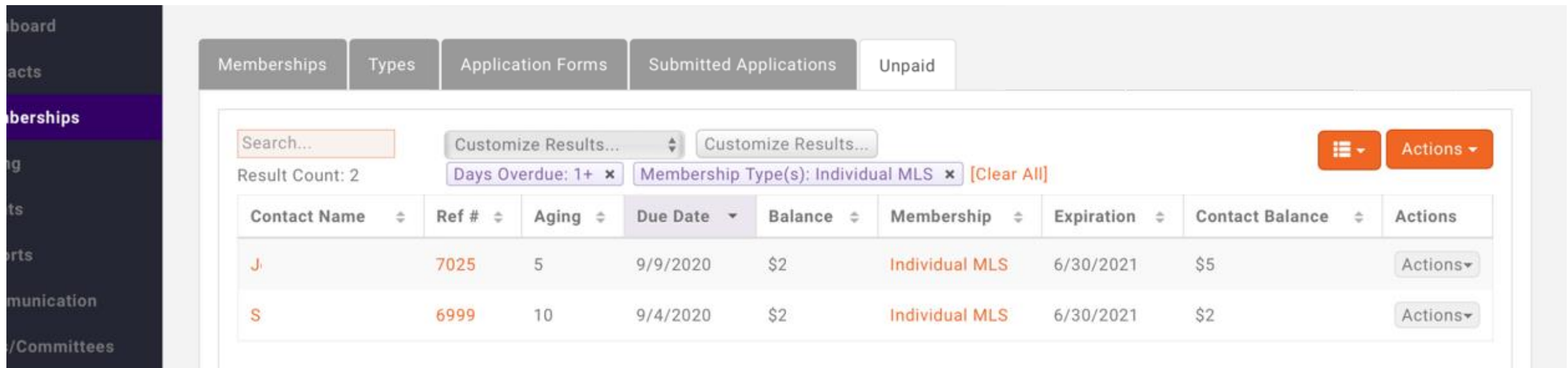
- Renewals sent: **10/1**
- Renewals due: **12/1**
- Late fee: **12/15**
- Re-activation fee and suspend: **12/31**
- Drop member: **1/15**

Unpaid Member Tab

Save time by managing every step of your renewal process from one place.

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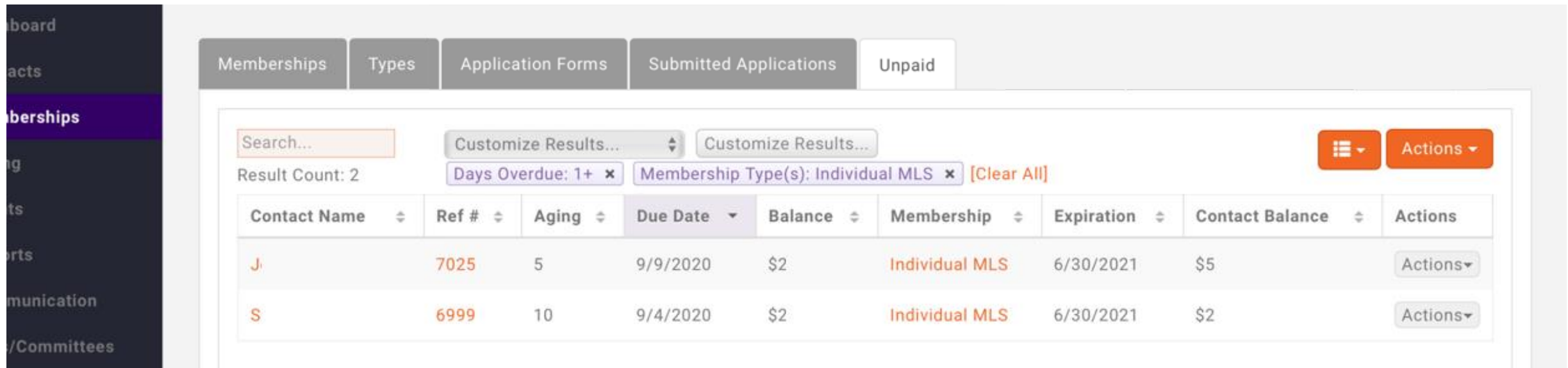


The screenshot shows a software interface for managing unpaid memberships. At the top, there are navigation tabs: Memberships, Types, Application Forms, Submitted Applications, and Unpaid. Below the tabs is a search bar and filter options. The main area displays a table with two rows of membership data. Each row has an 'Actions' button.

Contact Name	Ref #	Aging	Due Date	Balance	Membership	Expiration	Contact Balance	Actions
J	7025	5	9/9/2020	\$2	Individual MLS	6/30/2021	\$5	Actions
S	6999	10	9/4/2020	\$2	Individual MLS	6/30/2021	\$2	Actions

Other Benefits:

- Add members to a list for calls or follow-ups
- Print to re-send or email invoices
- Exclude members on payment plans or with extenuating circumstances
- Leave open dues invoices as a trigger to charge fees on re-join



The screenshot shows a software interface for managing unpaid memberships. At the top, there are navigation tabs: Memberships, Types, Application Forms, Submitted Applications, and Unpaid. Below the tabs is a search bar and filter options. The filter options include 'Days Overdue: 1+' and 'Membership Type(s): Individual MLS'. The main content area displays a table with two rows of data. Each row has an 'Actions' button next to it.

Contact Name	Ref #	Aging	Due Date	Balance	Membership	Expiration	Contact Balance	Actions
J	7025	5	9/9/2020	\$2	Individual MLS	6/30/2021	\$5	Actions
S	6999	10	9/4/2020	\$2	Individual MLS	6/30/2021	\$2	Actions

Recent Releases

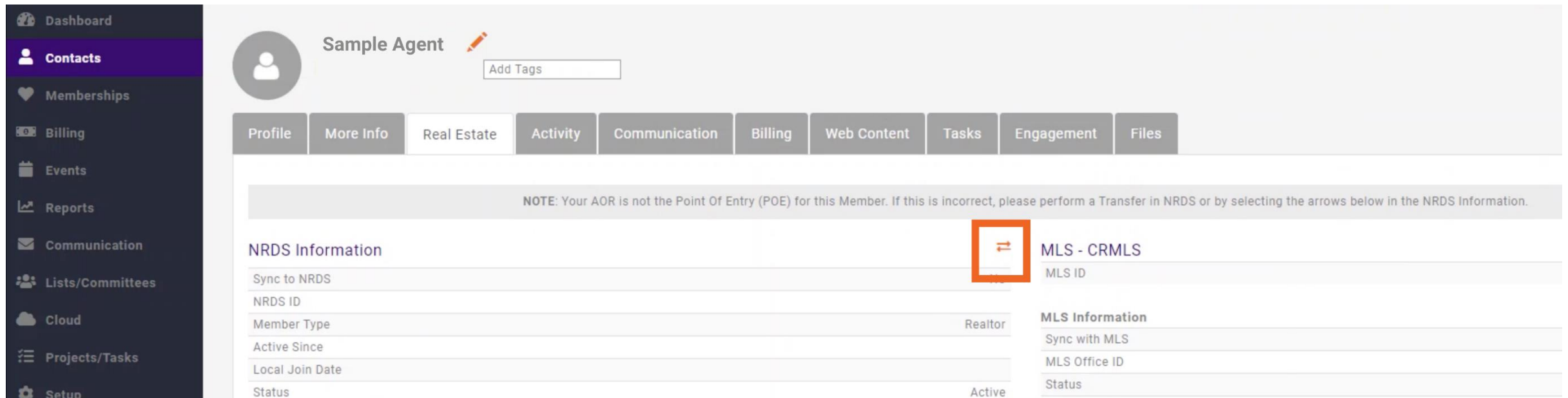
NRDS TRANSFER



Andrew Shipe
Product Manager

NRDS Transfer – Right from GrowthZone

Save a trip to NRDS, and make the change right from the Real Estate tab.
Set your association as an Agent's or Office's POE when they join.



Dashboard

Contacts

Memberships

Billing

Events

Reports


Communication

Lists/Committees

Cloud

Projects/Tasks

Setup

Sample Agent  Add Tags

Profile More Info Real Estate Activity Communication Billing Web Content Tasks Engagement Files

NOTE: Your AOR is not the Point Of Entry (POE) for this Member. If this is incorrect, please perform a Transfer in NRDS or by selecting the arrows below in the NRDS Information.

NRDS Information

Sync to NRDS	
NRDS ID	
Member Type	Realtor
Active Since	
Local Join Date	
Status	Active

MLS - CRMLS

MLS ID	
--------	--

MLS Information

Sync with MLS	
MLS Office ID	
Status	

Recent Releases

QUICK TIPS

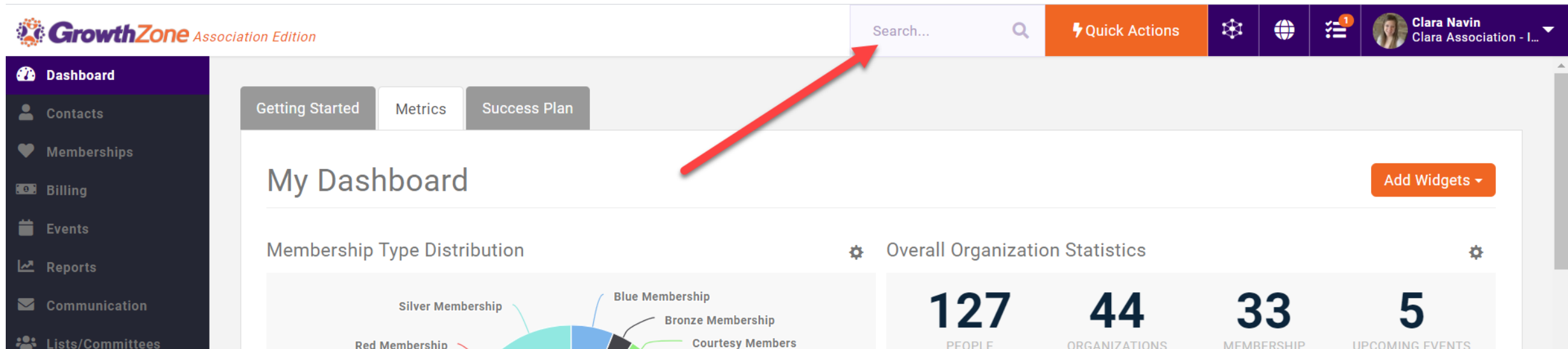


Clara Navin
Product Manager

Use Global Search to Find Agents/Offices Quickly

Save time and search by:

NRDS ID | MLS ID/Office MLS ID | License Number | and any common contact information



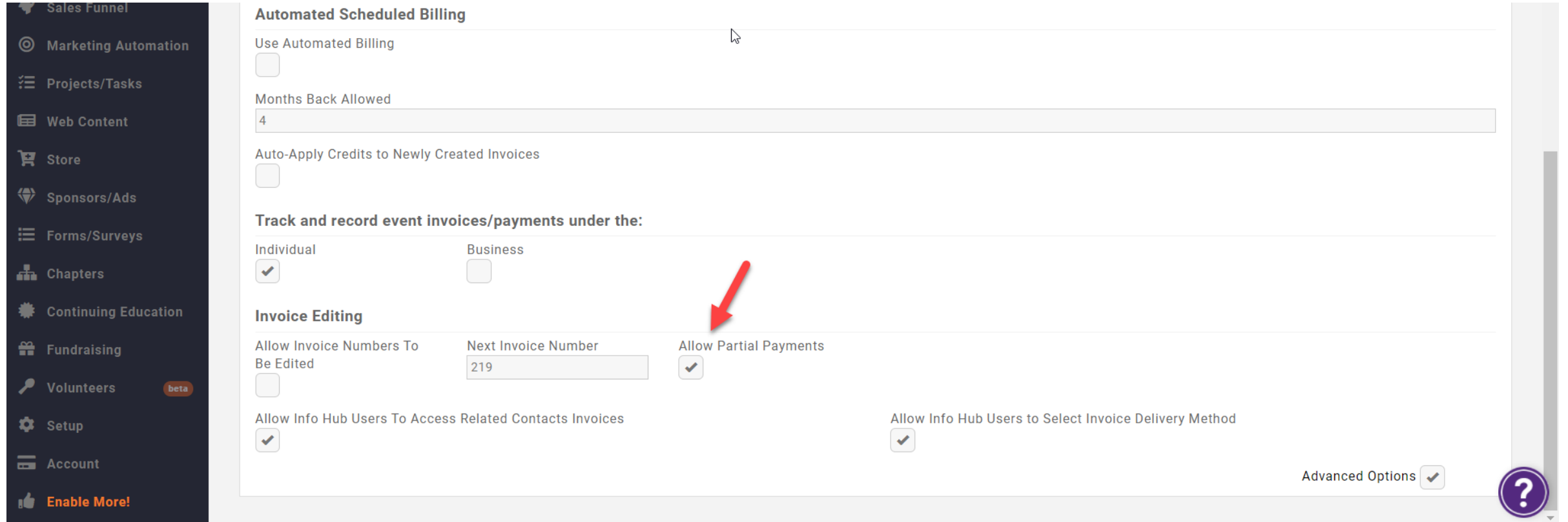
The screenshot shows the GrowthZone Association Edition dashboard. At the top, there is a navigation bar with the GrowthZone logo, a search bar labeled "Search...", and several utility icons including "Quick Actions", a globe, a list icon with a notification badge, and a user profile for Clara Navin. Below the navigation bar, the main dashboard area is titled "My Dashboard" and includes tabs for "Getting Started", "Metrics", and "Success Plan". The dashboard content is divided into two main sections: "Membership Type Distribution" and "Overall Organization Statistics". The "Membership Type Distribution" section features a pie chart with five categories: Silver Membership, Blue Membership, Bronze Membership, Red Membership, and Courtesy Members. The "Overall Organization Statistics" section displays four key metrics: 127 PEOPLE, 44 ORGANIZATIONS, 33 MEMBERSHIP, and 5 UPCOMING EVENTS. A red arrow points to the search bar in the top navigation bar.

Turn Off Partial Payments

Don't want members to make partial dues payments?

You can now turn off the ability to allow partial payments with one easy setting for all.

Setup > Finance, General Settings > "Allow Partial Payments"



The screenshot displays the 'Automated Scheduled Billing' settings page in the GrowthZone software. The left sidebar contains navigation options: Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, Continuing Education, Fundraising, Volunteers (beta), Setup, Account, and Enable More!. The main content area is titled 'Automated Scheduled Billing' and includes the following settings:

- Use Automated Billing:**
- Months Back Allowed:**
- Auto-Apply Credits to Newly Created Invoices:**
- Track and record event invoices/payments under the:**
 - Individual:**
 - Business:**
- Invoice Editing:**
 - Allow Invoice Numbers To Be Edited:**
 - Next Invoice Number:**
 - Allow Partial Payments:** (highlighted with a red arrow)
- Allow Info Hub Users To Access Related Contacts Invoices:**
- Allow Info Hub Users to Select Invoice Delivery Method:**

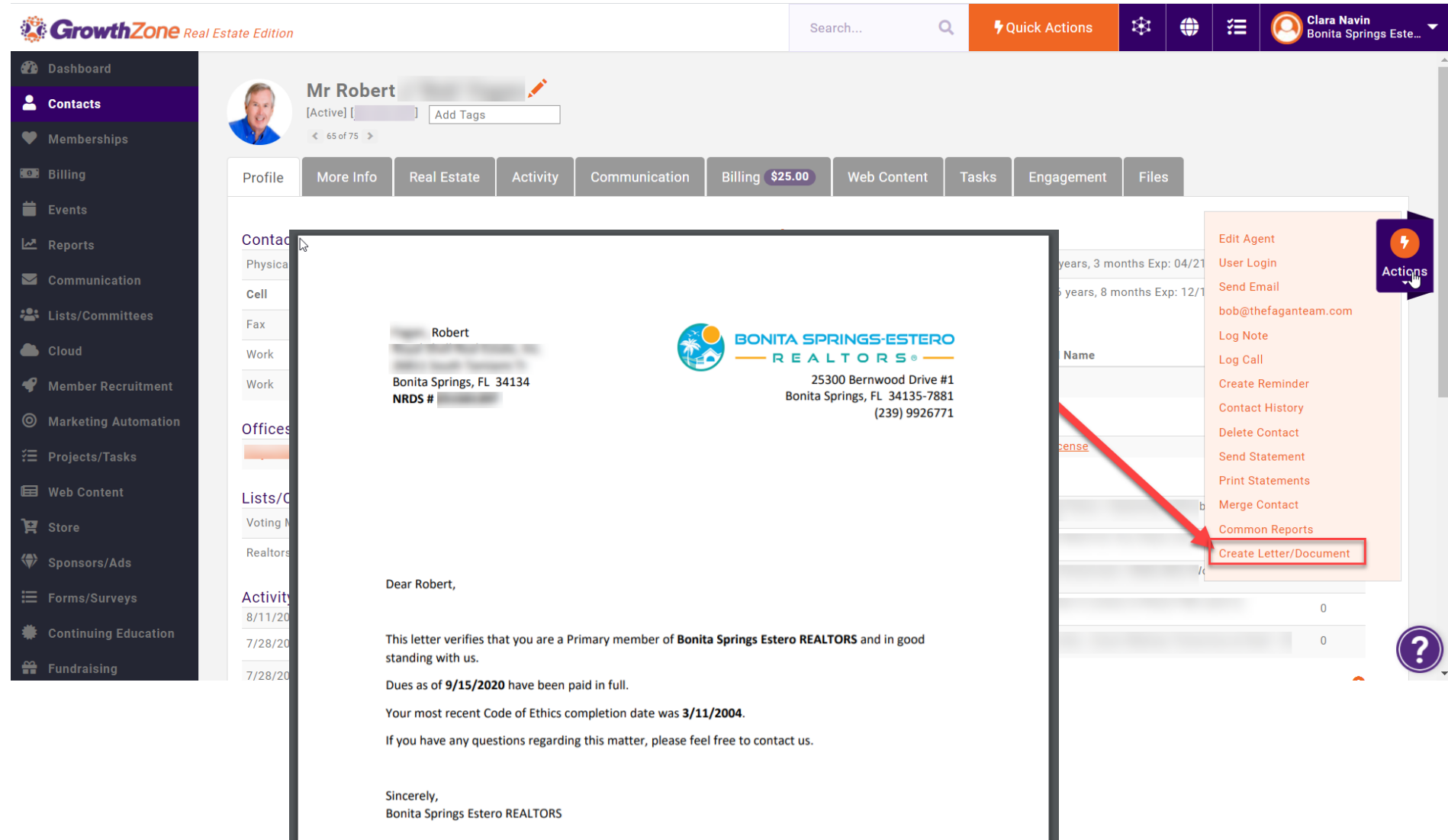
At the bottom right, there is an 'Advanced Options' checkbox which is also checked. A help icon (question mark in a circle) is located in the bottom right corner of the interface.

Letter of Good Standing

Generate a Letter of Good Standing

You can now quickly and easily generate this document right from the contact.

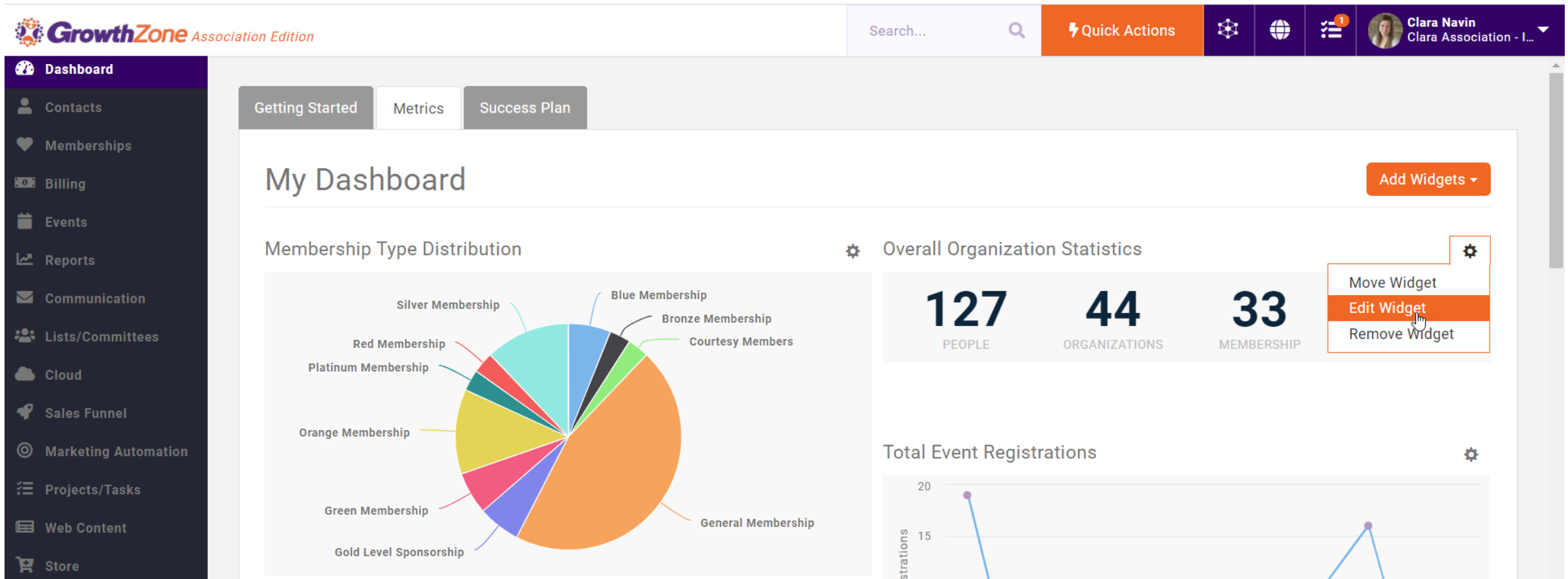
Utilize our seeded in template or adjust to make your own.



The screenshot displays the GrowthZone Real Estate Edition interface. On the left is a navigation sidebar with options like Dashboard, Contacts, Memberships, Billing, Events, Reports, Communication, Lists/Committees, Cloud, Member Recruitment, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Continuing Education, and Fundraising. The main area shows a contact profile for 'Mr Robert' with tabs for Profile, More Info, Real Estate, Activity, Communication, Billing (\$25.00), Web Content, Tasks, Engagement, and Files. A 'Contact' dropdown menu is open, listing various actions such as Edit Agent, User Login, Send Email, Log Note, Log Call, Create Reminder, Contact History, Delete Contact, Send Statement, Print Statements, Merge Contact, Common Reports, and 'Create Letter/Document', which is highlighted with a red box and a red arrow. The letter content is visible below the menu, starting with 'Dear Robert,' and stating: 'This letter verifies that you are a Primary member of Bonita Springs Estero REALTORS and in good standing with us. Dues as of 9/15/2020 have been paid in full. Your most recent Code of Ethics completion date was 3/11/2004. If you have any questions regarding this matter, please feel free to contact us. Sincerely, Bonita Springs Estero REALTORS'.

Customize Membership Dashboard Widgets

You can now select which membership types should be accounted for in each membership related Dashboard widget.



The screenshot displays the GrowthZone Association Edition dashboard. The top navigation bar includes a search field, a 'Quick Actions' button, and user information for Clara Navin. A left sidebar lists various dashboard sections. The main content area features a 'My Dashboard' header with an 'Add Widgets' button. Below this, there are two primary widgets: 'Membership Type Distribution' and 'Overall Organization Statistics'. The 'Membership Type Distribution' widget contains a pie chart with the following categories: Silver Membership, Blue Membership, Bronze Membership, Courtesy Members, Red Membership, Platinum Membership, Orange Membership, Green Membership, Gold Level Sponsorship, and General Membership. The 'Overall Organization Statistics' widget shows three key metrics: 127 PEOPLE, 44 ORGANIZATIONS, and 33 MEMBERSHIP. A context menu is open over the 'Overall Organization Statistics' widget, showing options: 'Move Widget', 'Edit Widget' (highlighted), and 'Remove Widget'. Below these widgets, a 'Total Event Registrations' line chart is partially visible.

Question and Answer Session

Time permitting, answer your questions.



Clara Navin
Product Manager



Andrew Shipe
Product Manager

REALTOR Specific Training Opportunities:

Sub Queue Processing (2-Way Sync)

Sept 17, 2020 at 11am – 12pm CST. [Click here](#) to register.

Managing Members with Unpaid Invoices

Sept 23, 2020 at 11am – 12pm CST. [Click here](#) to register.

Membership Proration

Sept 25, 2020 at 11:00 – 11:45am CST. [Click here](#) to register.

Sign Up for the REALTOR® Newsletter

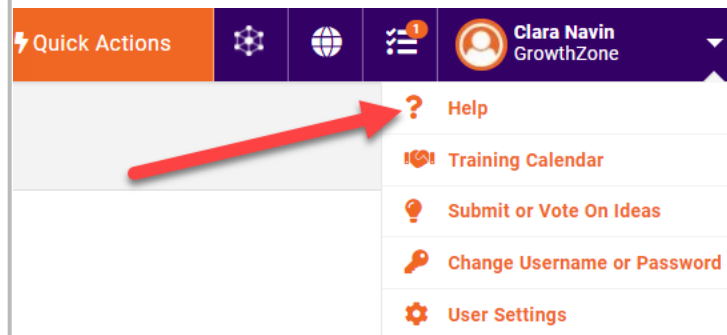
Stay up-to-date on the latest product news, with our twice monthly newsletter.

<https://growthzone.growthzoneapp.com/real-estate-news>



Training and Support Options

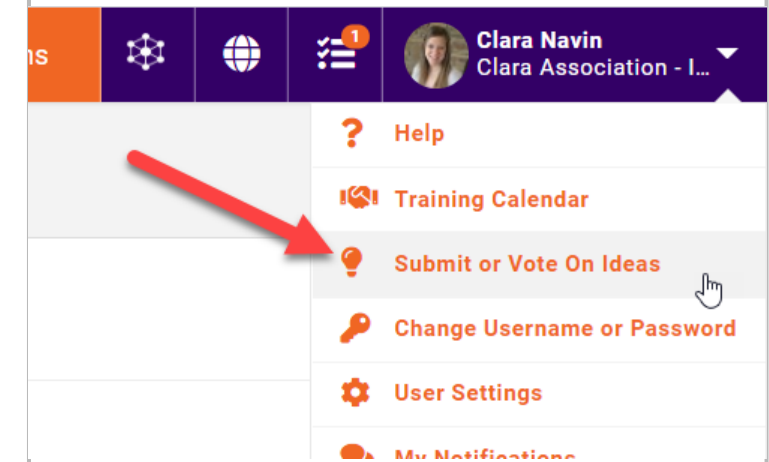
Questions on how to use specific features?
Search our Online Wiki



OR

Contact our Support Team
Mon-Fri: 8am to 5pm (CDT)
GZSupport@growthzone.com
800.825.9171, Option 4

Submit or Vote on Ideas



Submit your requests or ideas to our UserVoice forum. It's a direct line to the Product Team, and helps you stay notified when items release.

Thank You for Joining Us

