WEBINAR

What's New with GrowthZone?

Real Estate Edition

SEPTEMBER 2020

GrowthZone
smarter association software

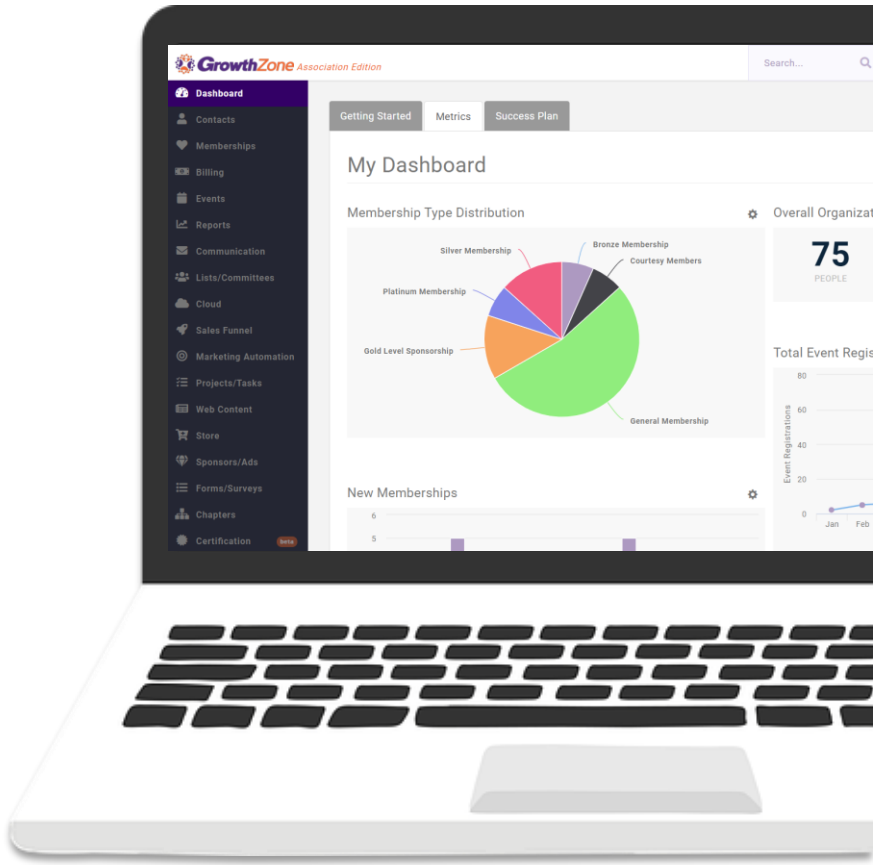
Introductions

Clara Navin
Product Manager

Andrew Shipe
Product Manager

Agenda

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

Additional Proration Options

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

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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*

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Recent Releases

UNPAID MEMBERSHIP ACTIONS/AUTOMATIONS

Andrew Shipe
Product Manager

Unpaid Membership Actions/Automations

Unpaid Member Tab

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

Unpaid Membership Actions/Automations

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EXAMPLE RENEWAL PROCESS:

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

Unpaid Membership Actions/Automations

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 Membership Actions/Automations

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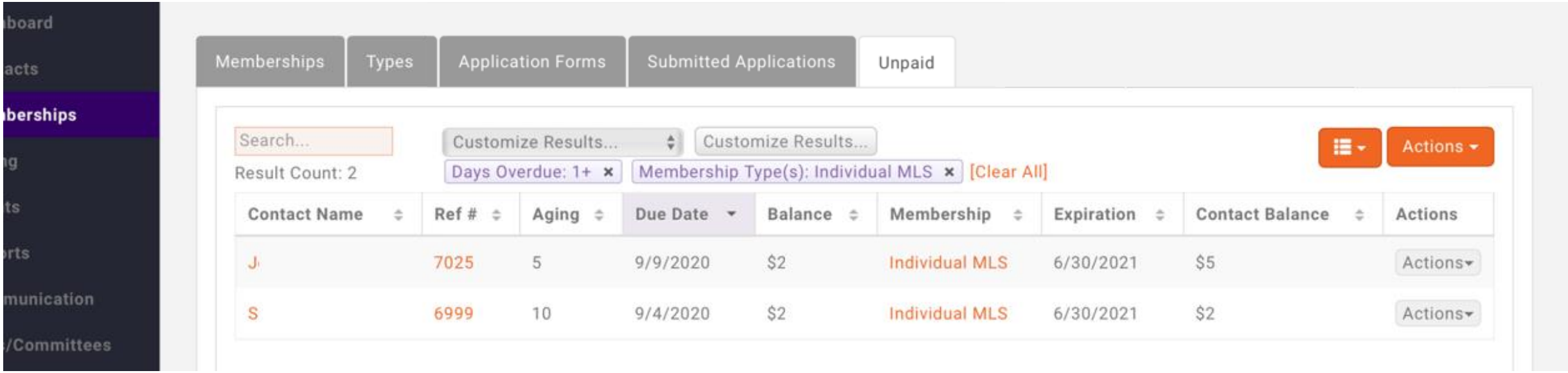
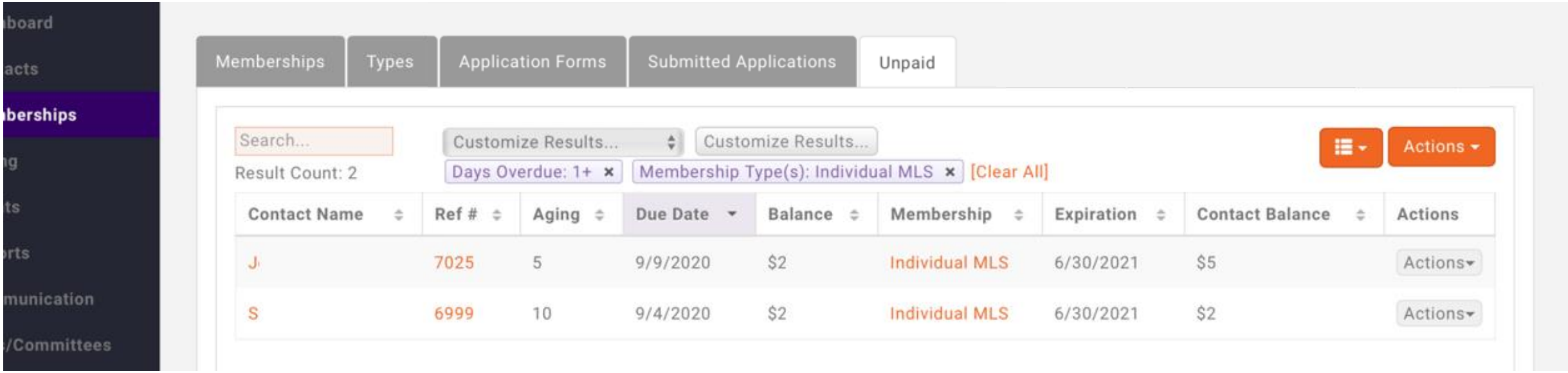


Unpaid Membership Actions/Automations

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



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Recent Releases

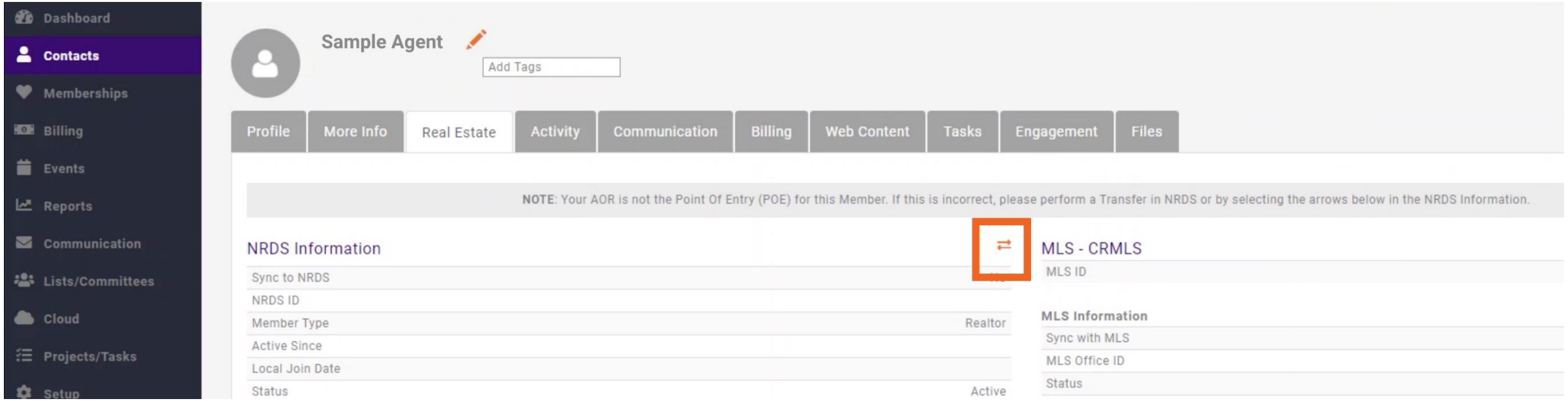
NRDS TRANSFER

Andrew Shipe
Product Manager

NRDS TRANSFER BUTTON

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.



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Recent Releases

QUICK TIPS

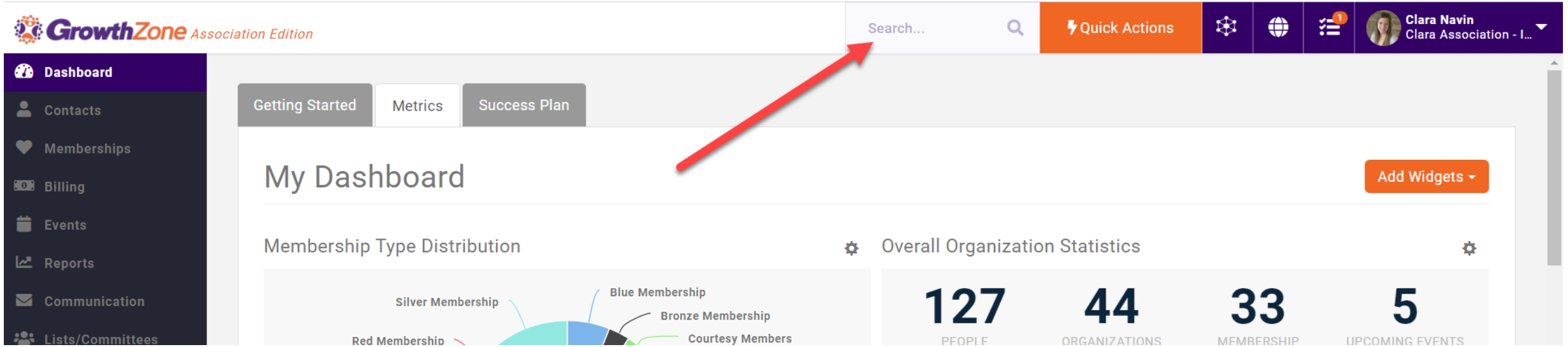
Clara Navin
Product Manager

Global Search

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

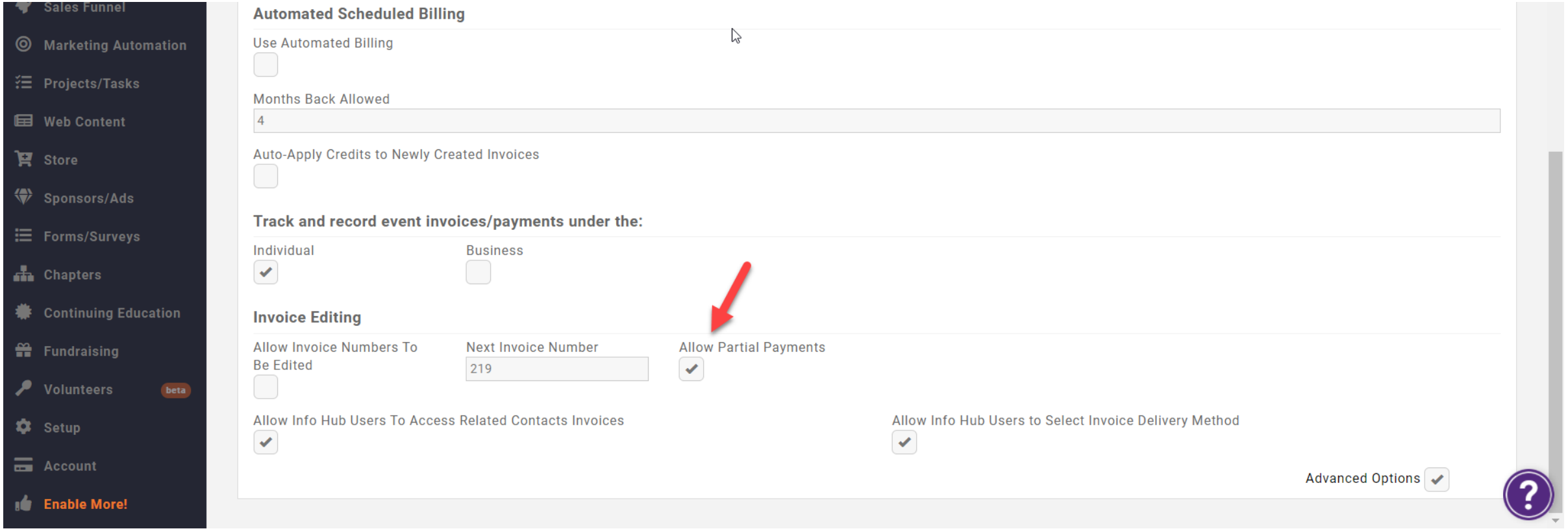


Turn Off Partial Payments

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”

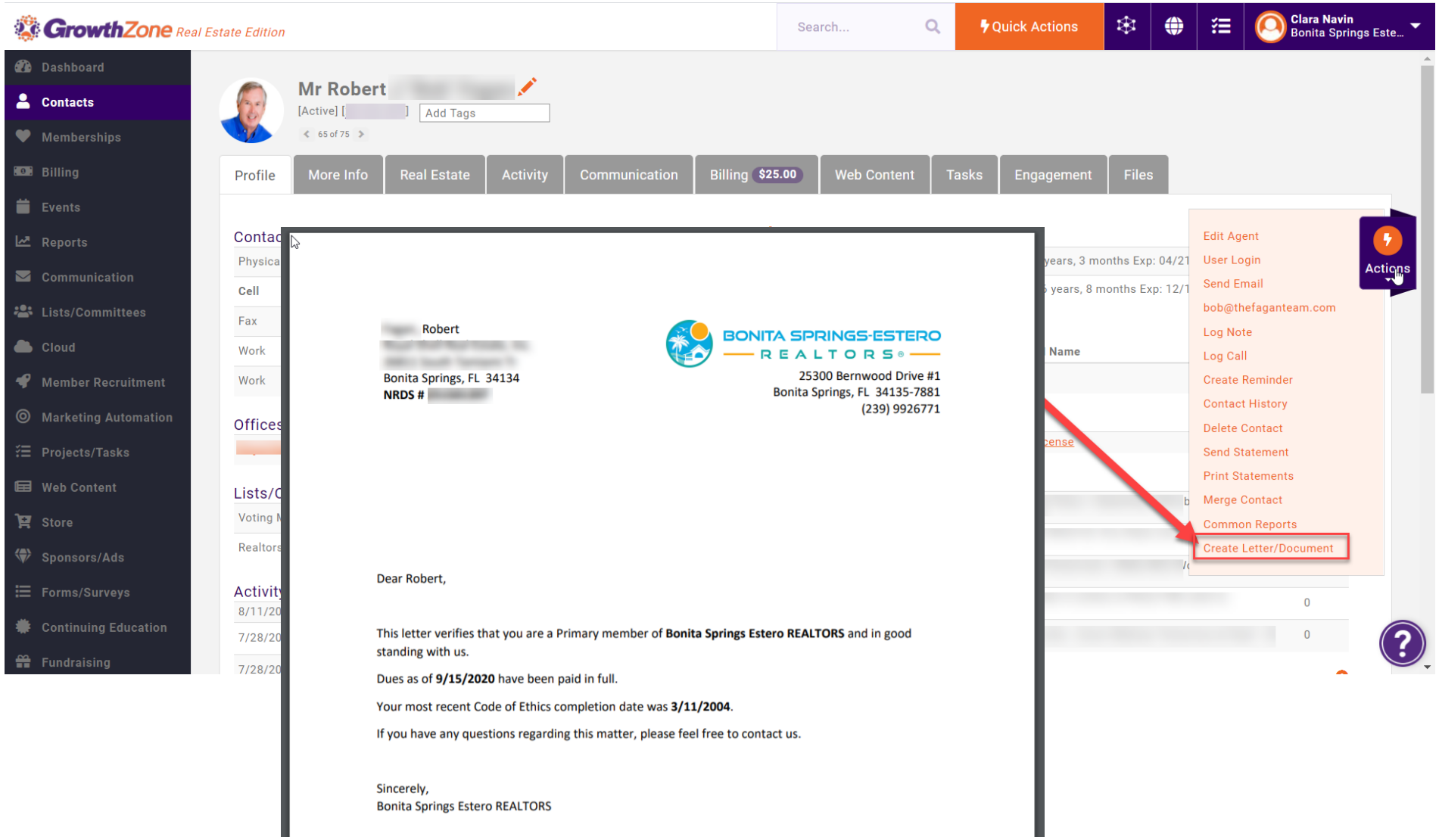


Letter of Good Standing

Generate a Letter of Good Standing

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

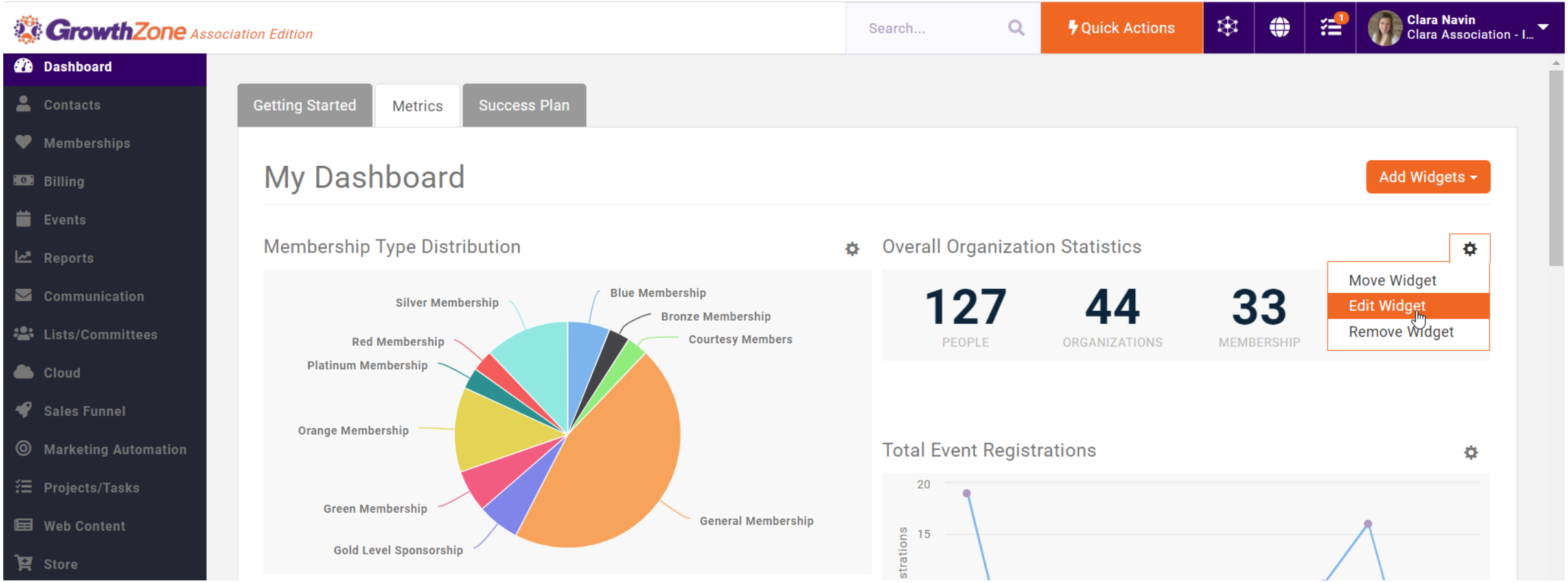
Utilize our seeded in template or adjust to make your own.



Customize Your Dashboard

Customize Membership Dashboard Widgets

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



Q&A

Question and Answer Session

Time permitting, answer your questions.

Clara Navin
Product Manager

Andrew Shipe
Product Manager

Training Opportunities

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.

Closing Thoughts

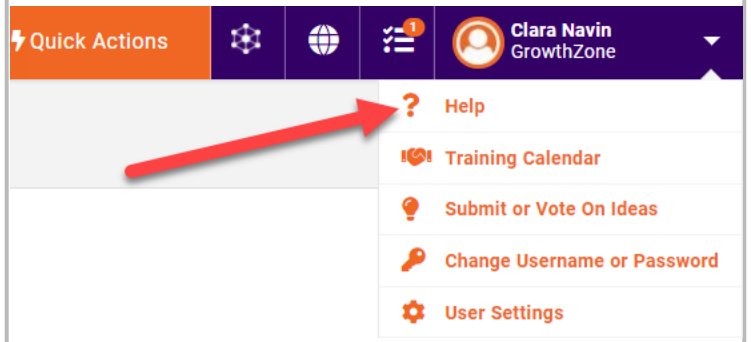
Sign Up for the REALTOR® Newsletter

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

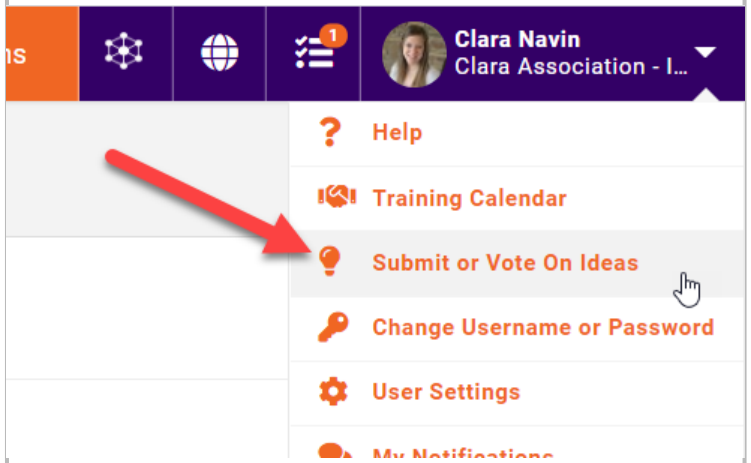


OR

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

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