



GrowthZone Realtor Edition Classroom Training

Day 1

9:00am – 9:30am INTRODUCTIONS

9:45am – 12 noon MEMBERSHIP & NRDS INTEGRATION MANAGEMENT

- Overview Membership Types & Membership Rules
- Activate Membership
- Best practice steps for adding Primary/Secondary Office, Agents
- Troubleshooting using the Event Log
- Upgrading, Downgrading, Dropping Membership

12:00pm – 1:00pm LUNCH

1:00 – 2:00 pm USING PROJECTS/TASKS FOR NEW MEMBER ORIENTATION

- Project/Tasks Overview
- Create a Project Template
- Assign and Manage Projects

2:00pm – 3:00 pm 5 STEPS TO A SIMPLE CERTIFICATION PROGRAM

- Create Certification
- Set Certification as Default
- Create Components
- Add Components to Events
- Complete a Component

3:15 – 3:45 PRODUCT REVIEW

3:45 – 4:30 5 THINGS TO KNOW ABOUT REPORTS

- Report Filtering Options
- Saving Reports
- Email Reports
- Adding Report Contacts to Lists
- Mailing Labels

Day 2

9:00am – 12noon ACCOUNTING

- Foundation: Chart of Accounts & Fee Items
- NAR Ecommerce Splits
- Reporting for National, State, Local, RPAC Dues
- Reconciling GZ to ACH report
- Reconciling GrowthZone (close accounting periods, reports needed to reconcile)

12:00pm – 1:00pm Lunch

1pm – 4:30 pm Managing Membership Dues Billing

- Best Practices
- Billing Responsible Party
- Run Upcoming Billing/Deliver Invoices
- Manage Unpaid Membership Dues
 - Resend invoices
 - Apply Late Fees
 - Suspend
 - Apply reactivation fee
 - Drop