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

Session A 1pm – 4:00pm Managing Membership Dues Billing

- Best Practices
- Run Upcoming Billing/Deliver Invoices
- Deliver Statements to Brokers00
- Manage Unpaid Membership Dues
    - Resend invoices
    - Apply Late Fees
    - Suspend
    - Apply reactivation fee
    - Drop

Session B: 1:00 – 4:00pm Info Hub

- Setting up the Info Hub
- Setting up the Info Hub Forum
- Manage Agent Access to the Info Hub
- Promoting the Info Hub

Day 2

Session C: 9:00am – 12noon   Accounting

- Foundation: Chart of Accounts & Fee Items
- NAR Ecommerce integration – how it works
- NAR Finance record – how it works
- Reporting for National, State, Local, RPAC Dues
- Reconciling GZ to ACH report
- Reconciling GrowthZone (close accounting periods, reports needed to reconcile)
- Update accounting software using the Accounting Summary Report

Session D: 9:00am – 12noon   Communications

- 5 Ways to Ensure your eMails get through
- Understanding eMail Settings
- Manage your Automated Messages
- Create eMail templates
- Communications… beyond Email
- Create/Manage Lists/Committees
- Using Marketing Automation

12:00pm – 1:00pm   Lunch

Session E: 1:00pm – 4:00pm Managing Events

- Certifications - how it works
- Manage Code of Ethics
- Setup Event tied to Certification module
- Managing Event Registrations
  - Matching contacts
  - Move a registration from one event to another
  - Cancel registrations
- Manage/Monitor member certifications
- Reporting on events (especially certifications)

Session E: 1:00pm – 4:00pm Reports

- Common Report Functions
- 5 Membership Reports you Should Know
- 5 Billing Reports you Should Know
- Using Reports for Smart Lists

A Customer Service team member will also be on-site. When registering, if you wish, you can sign up for a 15-minute consult to review issues specific to your association.