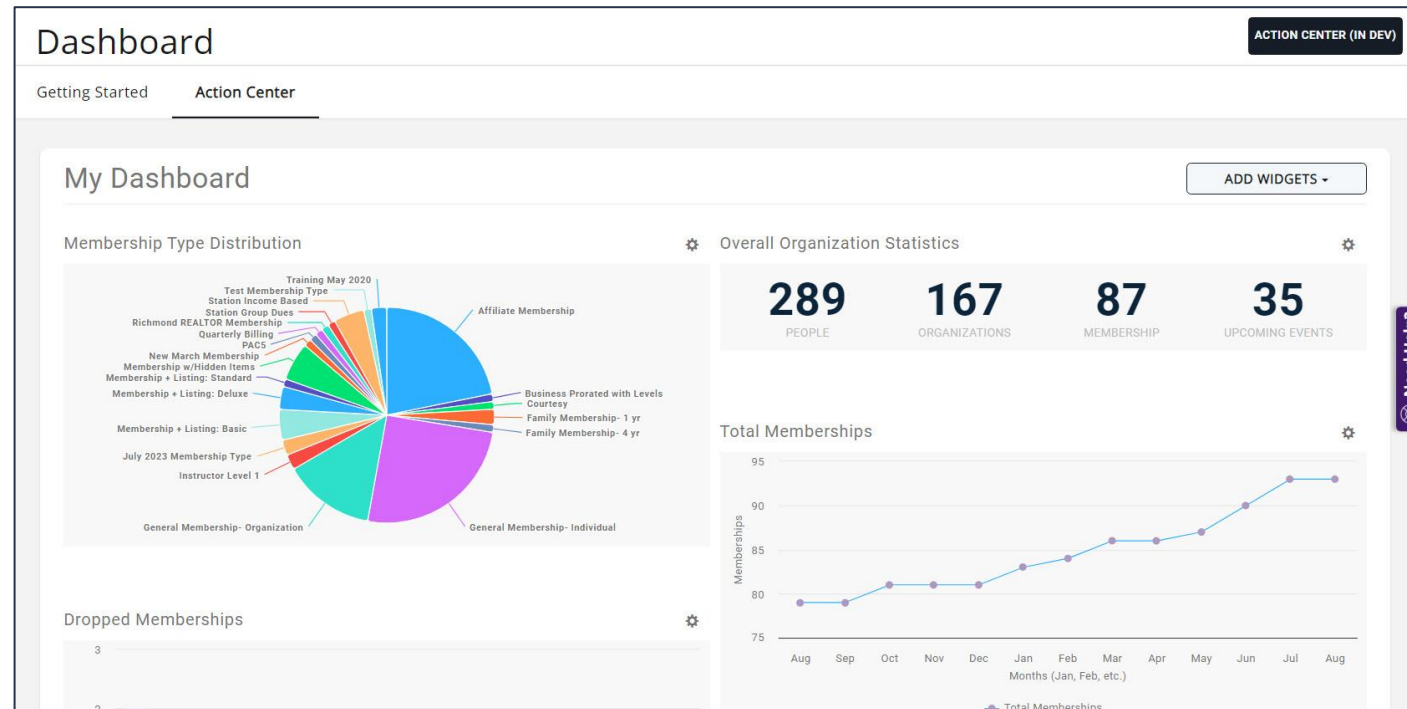


GrowthZone: Solution Overview

Agenda

System Navigation Overview of GrowthZone Modules



Overview

GrowthZone is the smart association software designed to help you:

- ❖ Grow your membership
- ❖ Retain and engage your existing organizations or individuals
- ❖ Do more with less time

Overview

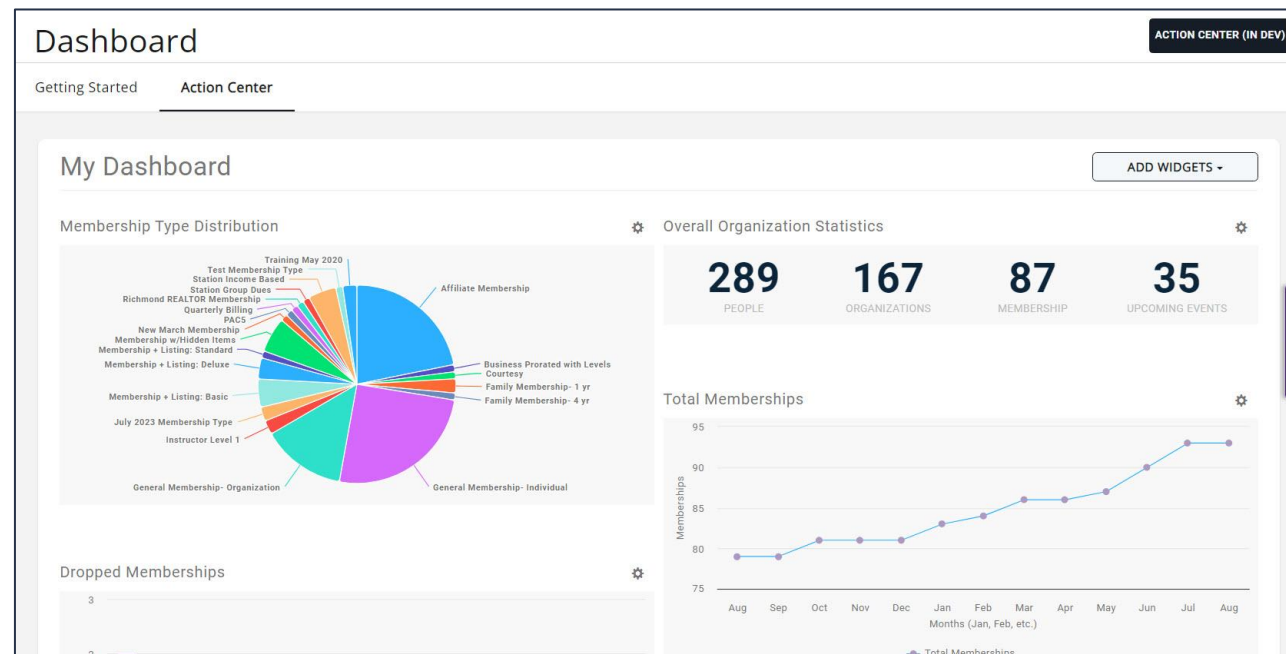
Easy to use, and designed to manage all the day-to-day operations of your organization

Three Different Views:

- Staff/Database View
- Member View
- Public View

Overview – Staff View - Database

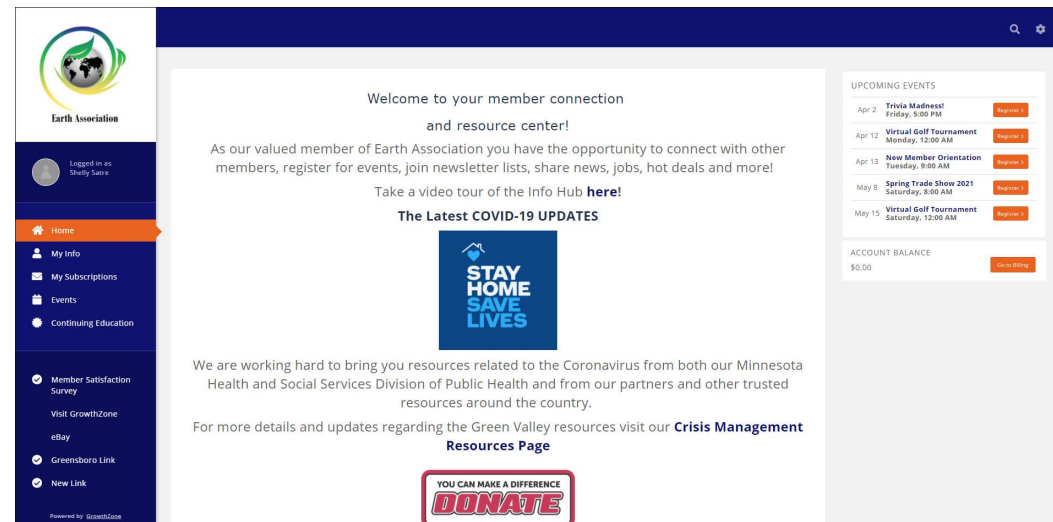
Where you will be able to manage all of your contacts and members, manage your events, generate and analyze reports, and work with the modules that you have selected



Overview – Member View - InfoHub

Members can

- Update own information (photos, directory listing, website, etc.)
- Manage their account and pay their bills
- Register for Events, enter New Events
- Enter Hot Deals, Member to Member Deals, & Job Postings...



The screenshot displays the member view of the Earth Association InfoHub. The interface features a dark blue sidebar on the left with the Earth Association logo and a navigation menu including Home, My Info, My Subscriptions, Events, Continuing Education, Member Satisfaction Survey, Visit GrowthZone, eBay, Greensboro Link, and New Link. The main content area is white and contains a welcome message, a list of upcoming events, and a COVID-19 update section. The update section includes a 'STAY HOME SAVE LIVES' graphic and a 'DONATE' button. The right sidebar shows the account balance and a list of upcoming events.

Earth Association

Logged in as Shelby Sarre

Home

My Info

My Subscriptions

Events

Continuing Education

Member Satisfaction Survey

Visit GrowthZone

eBay

Greensboro Link

New Link

Powered by GrowthZone

Welcome to your member connection and resource center!

As our valued member of Earth Association you have the opportunity to connect with other members, register for events, join newsletter lists, share news, jobs, hot deals and more!

Take a video tour of the Info Hub [here!](#)

The Latest COVID-19 UPDATES

STAY HOME SAVE LIVES

We are working hard to bring you resources related to the Coronavirus from both our Minnesota Health and Social Services Division of Public Health and from our partners and other trusted resources around the country.

For more details and updates regarding the Green Valley resources visit our [Crisis Management Resources Page](#)

YOU CAN MAKE A DIFFERENCE **DONATE**

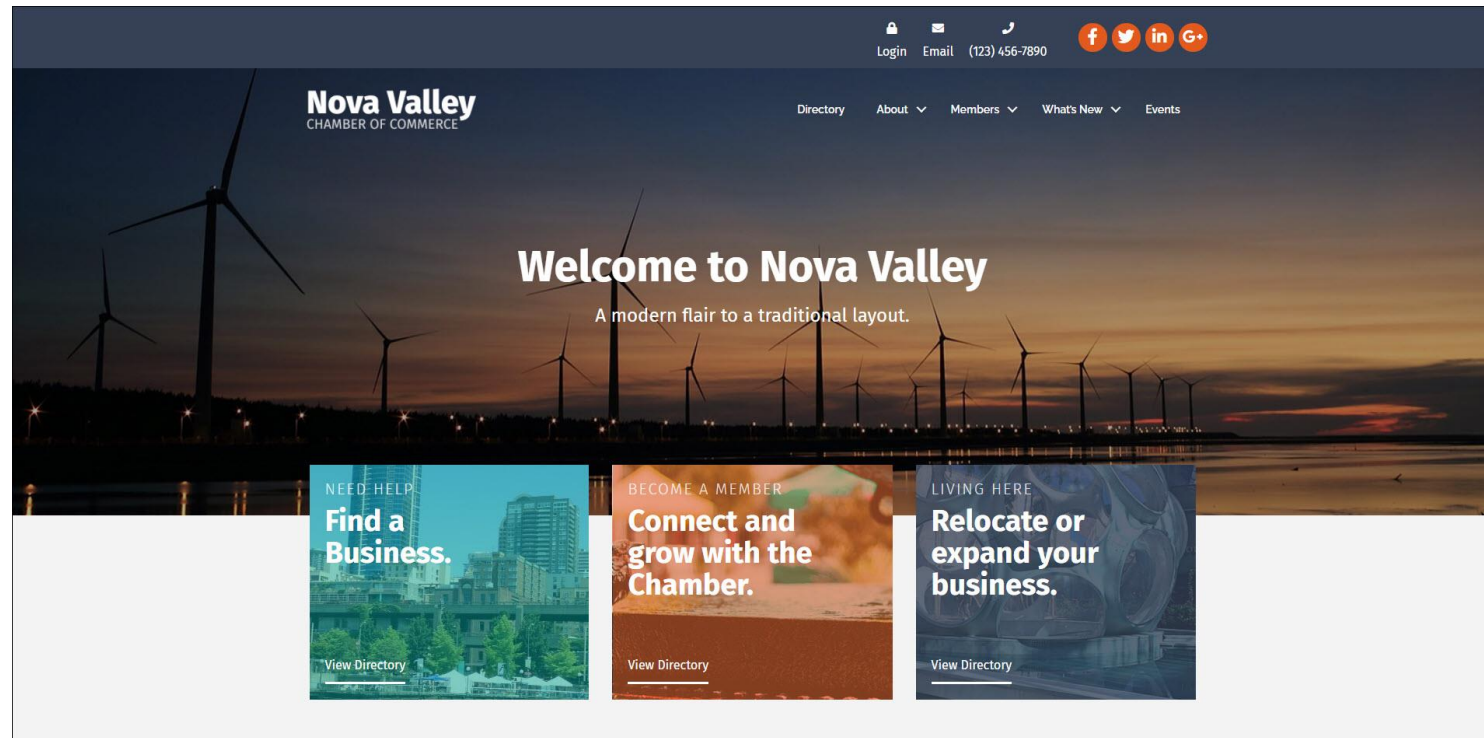
UPCOMING EVENTS

Apr 2	Trivia Madness! Friday, 5:00 PM	Register
Apr 12	Virtual Golf Tournament Monday, 12:00 AM	Register
Apr 13	New Member Orientation Tuesday, 9:00 AM	Register
May 8	Spring Trade Show 2021 Saturday, 8:00 AM	Register
May 15	Virtual Golf Tournament Saturday, 12:00 AM	Register

ACCOUNT BALANCE \$0.00 [Go to Billing](#)

Overview – Website – Public View

We can design a website for you or assist in integrating to your existing site.



Staff View - Database

Logging In: <https://growthzoneapp.com/login>

GrowthZone
smarter association software

shellys

.....

Remember Me [Need Help?](#)

Log In

TRAINING
Join us for GrowthZone online training.
[View the details & register now!](#)

- Apr 2 LIVE - GrowthZone - Managing Member... [...](#)
- Apr 5 LIVE - GrowthZone Solution Overview [...](#)
- Apr 7 LIVE - GrowthZone Communications [...](#)

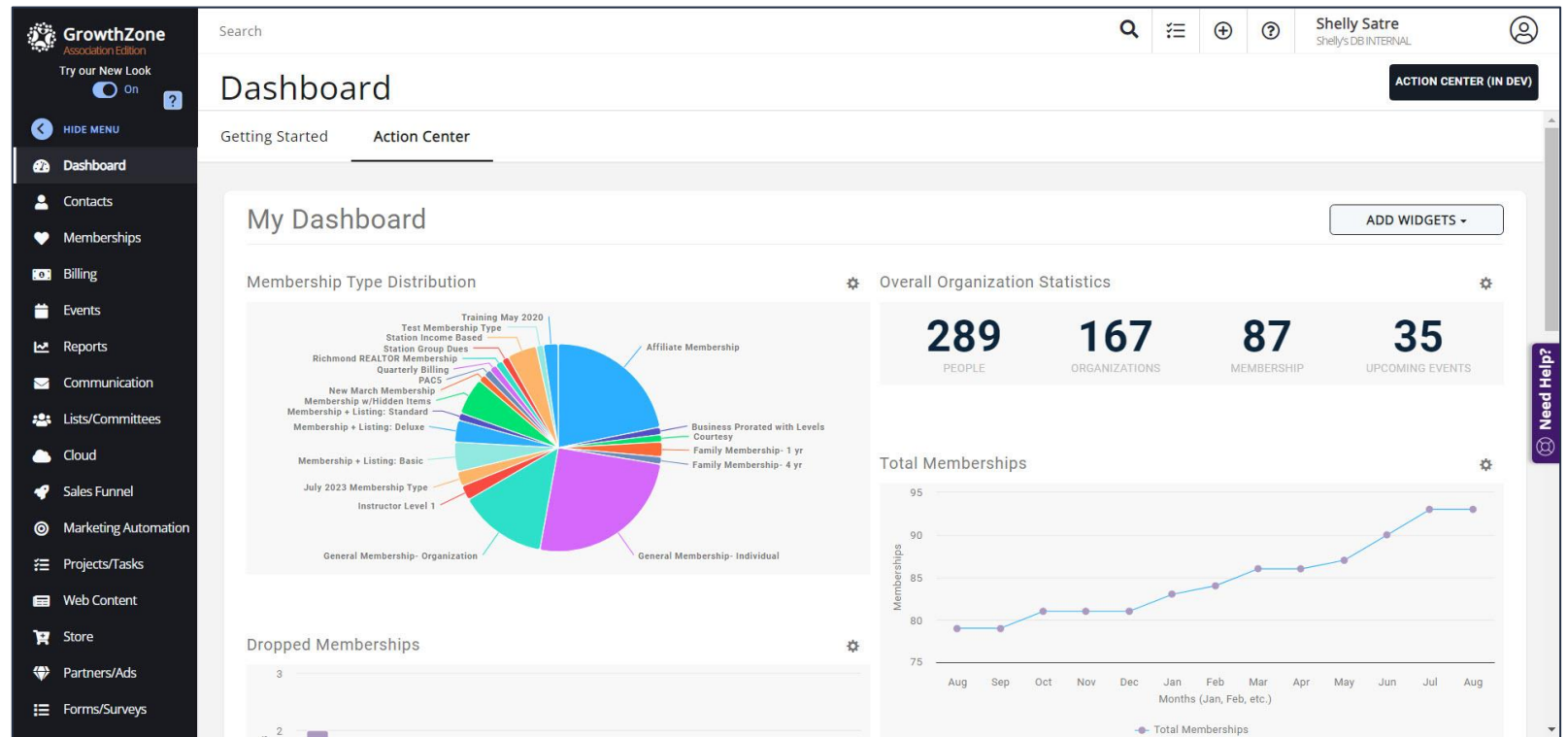
[View Full Calendar >](#)

REFER & EARN
Refer a colleague from another association or chamber & receive a \$250 cash card!
[Details >>](#)

[?](#)

Staff View – Database Navigation

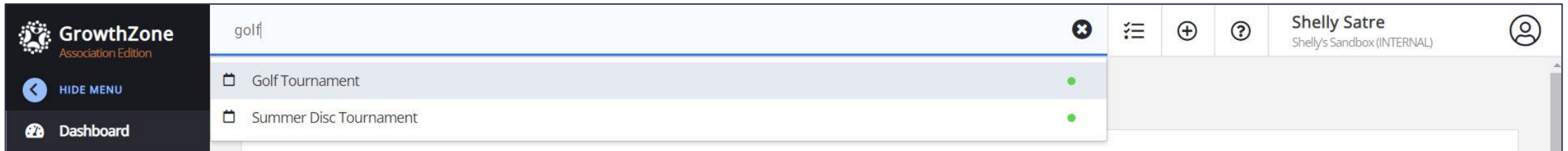
Header
Navigation Panel
Work Space
Common Functions



Software Navigation - Header

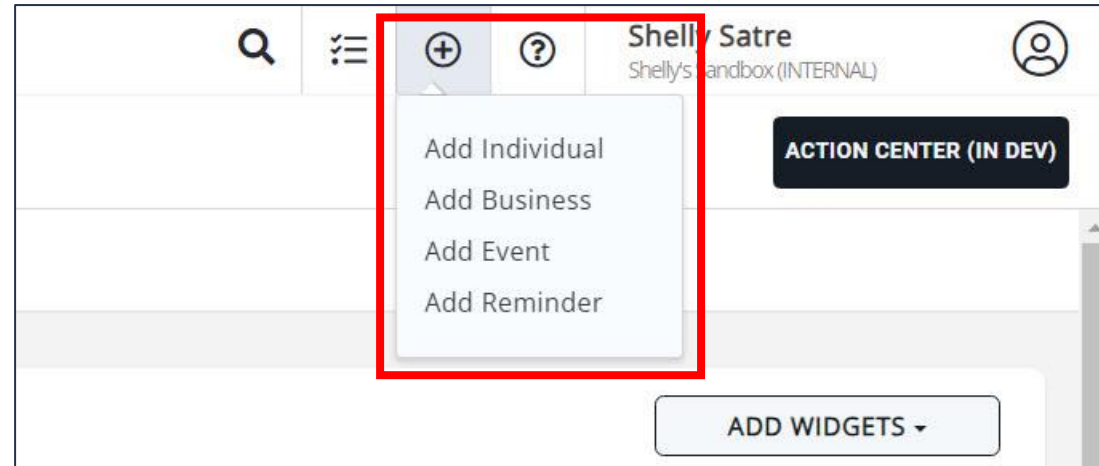
Search

- The Search option allows you to easily search for Contacts, Members or Events



Software Navigation – Quick Actions

Add Individual Contacts...
Add Business Contacts...
Add Events...
Add Reminders...



Software Navigation – Quick Actions

Example

Add Contacts - Organization

Add Business ✕

General

Name* Account Number

Phone, email, or website Type Note - +

Addresses

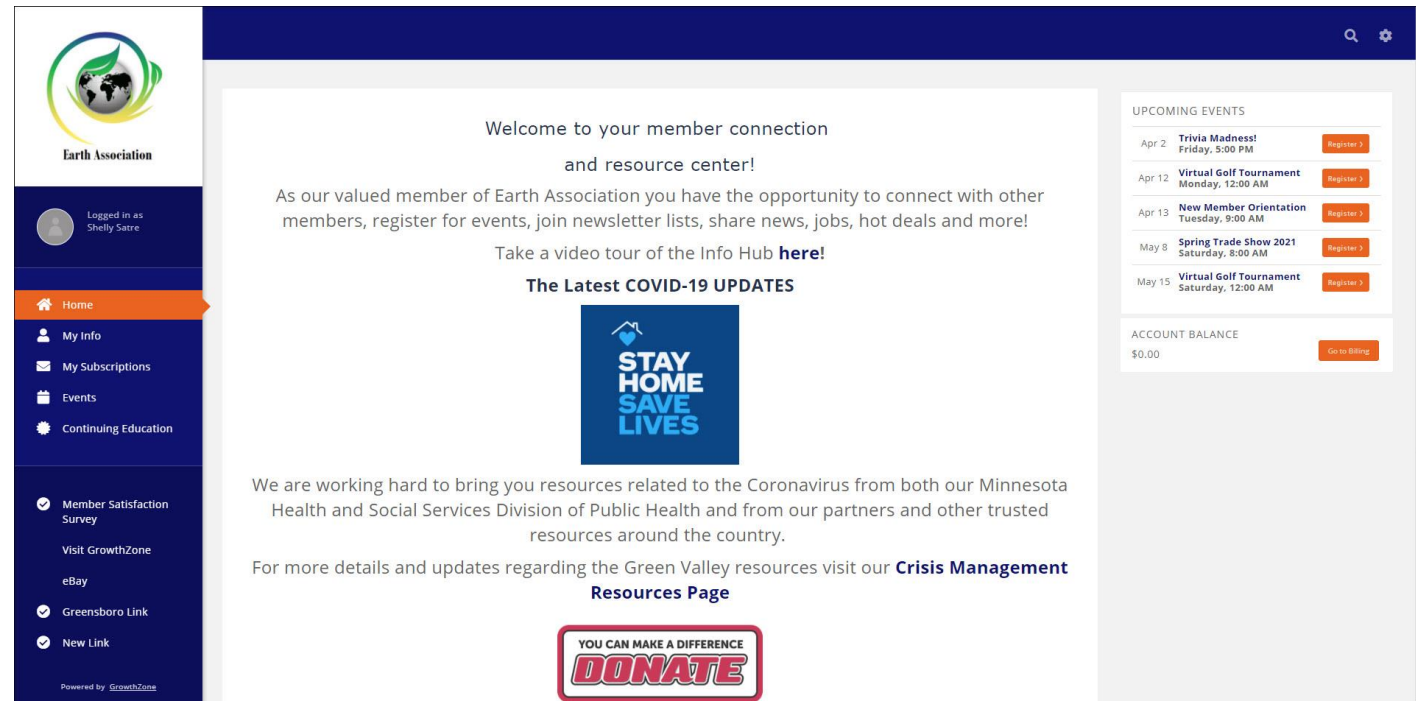
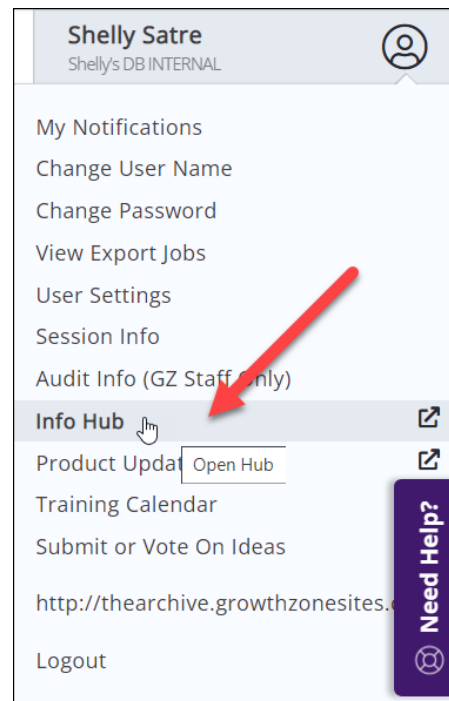
Address Address 2 City State/Prov. Postal Code -

Country Type Usage Note +

Individuals (Optional)

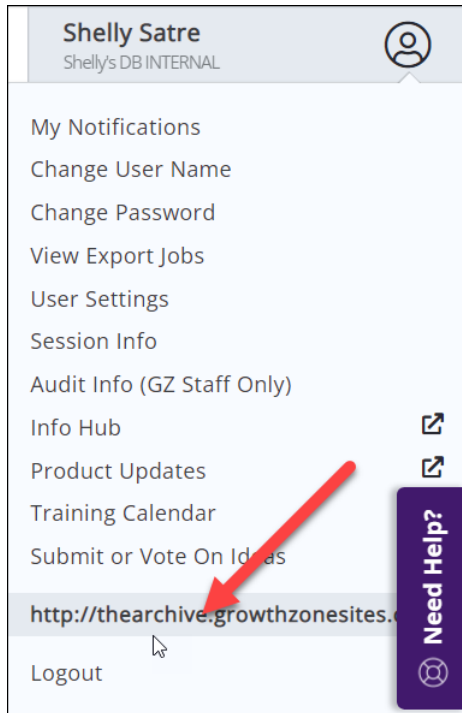
Software Navigation – Info Hub

Logged on staff users can access the Info Hub thru their menu:

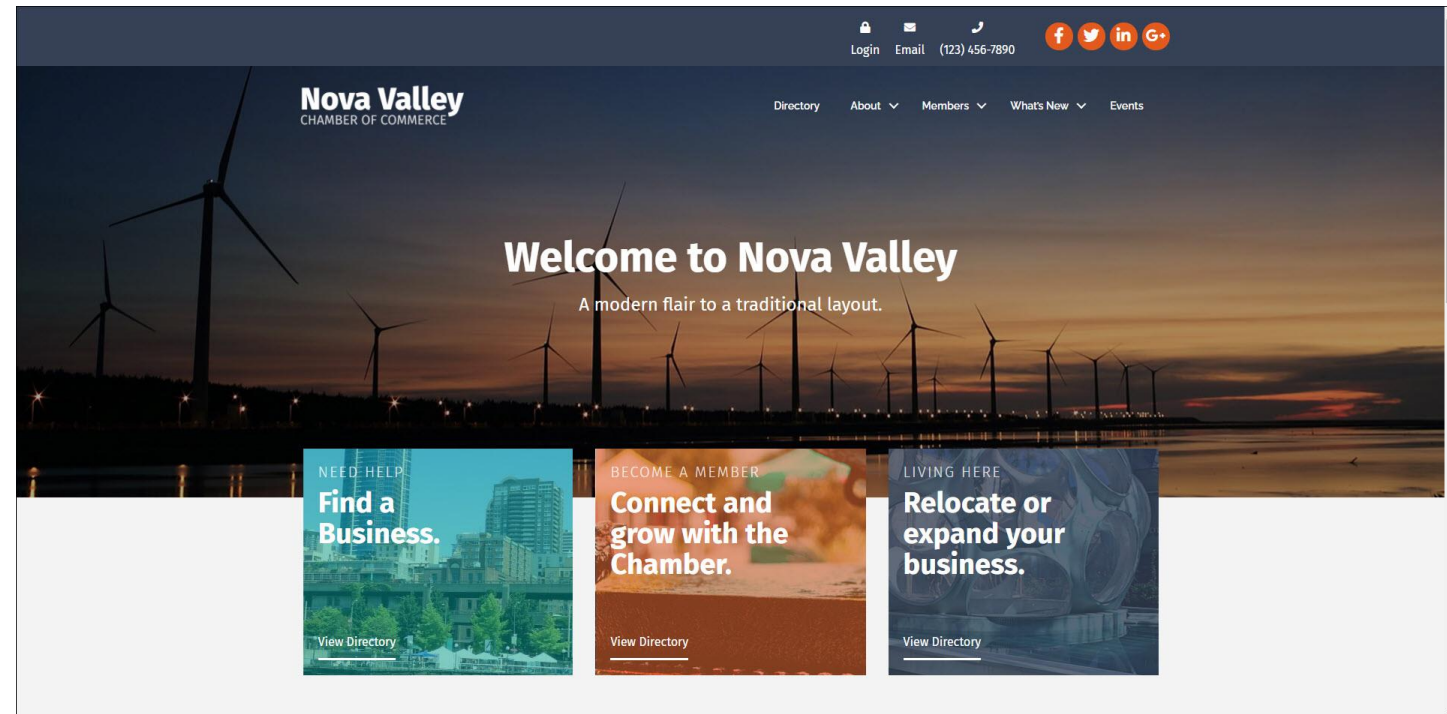


Software Navigation – Website

Logged on staff users can access your website via their menu:



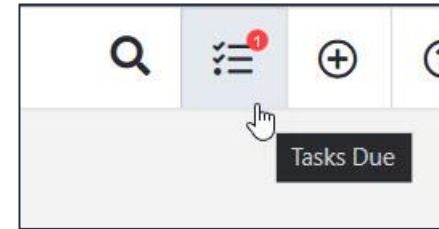
A screenshot of a user profile menu for 'Shelly Satre' (Shelly's DB INTERNAL). The menu items are: My Notifications, Change User Name, Change Password, View Export Jobs, User Settings, Session Info, Audit Info (GZ Staff Only), Info Hub, Product Updates, Training Calendar, Submit or Vote On Ideas, <http://thearchive.growthzonesites.com>, and Logout. A red arrow points to the URL. On the right side of the menu, there are two share icons and a purple 'Need Help?' button with a help icon.



A screenshot of the Nova Valley Chamber of Commerce website. The header includes the logo 'Nova Valley CHAMBER OF COMMERCE', navigation links for Directory, About, Members, What's New, and Events, and utility links for Login, Email, and a phone number (123) 456-7890. Social media icons for Facebook, Twitter, LinkedIn, and Google+ are also present. The main content area features a large banner with wind turbines and the text 'Welcome to Nova Valley' and 'A modern flair to a traditional layout.' Below the banner are three promotional cards: 'NEED HELP Find a Business.', 'BECOME A MEMBER Connect and grow with the Chamber.', and 'LIVING HERE Relocate or expand your business.' Each card has a 'View Directory' link.

Software Navigation – Assigned Tasks

Go to your list of Assigned tasks by clicking



Projects/Tasks

Projects **Tasks** Task Calendar

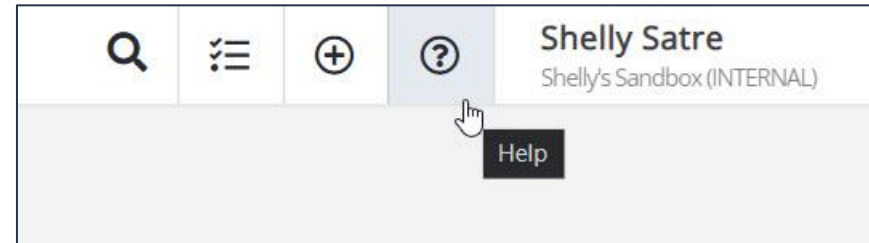
Search... X Is Open X Assigned To: Ivy Archive **ADD**

Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
<No Project Name>	<No Event Name>	Return phone calls	Important		Jared Kincaid	Ivy Archive	8/3/2023		0
<No Project Name>	<No Event Name>	Auto Reminder - Abby's Smoke Shop	Urgent		Abby's Smoke Shop	Ivy Archive	7/23/2023		0
Prospect new	<No Event Name>	First email	Normal		Bay Lake Coffee	Ivy Archive	9/15/2022		0

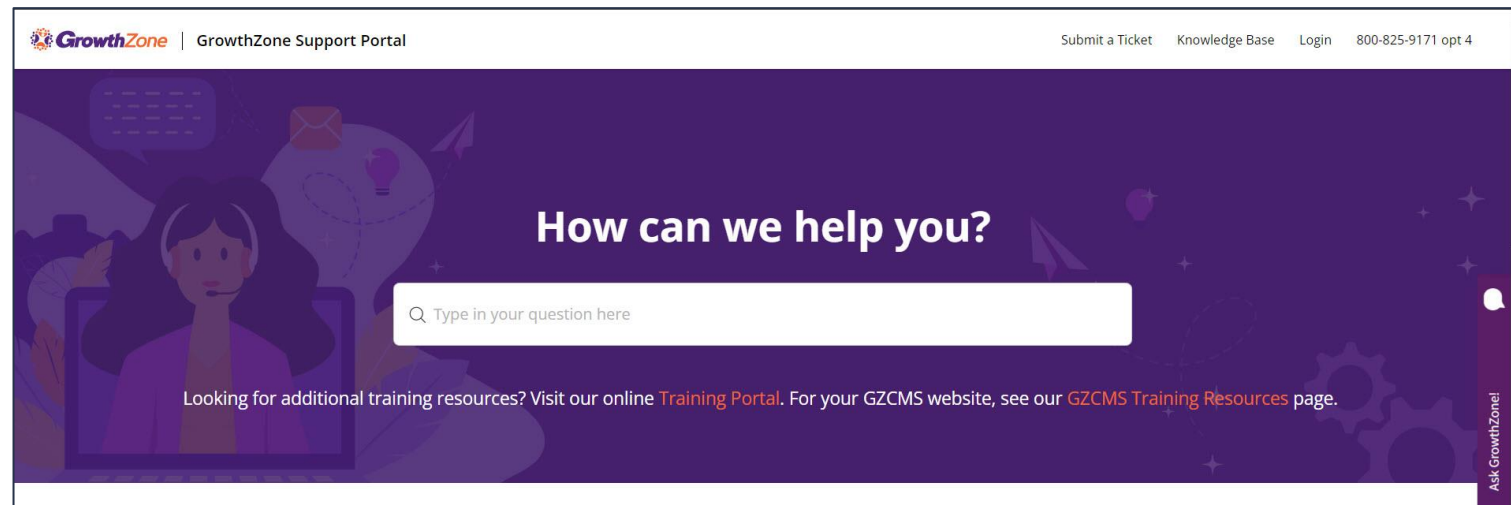
Help?

Software Navigation – Help

Go to the online Knowledge Base/ticket portal:



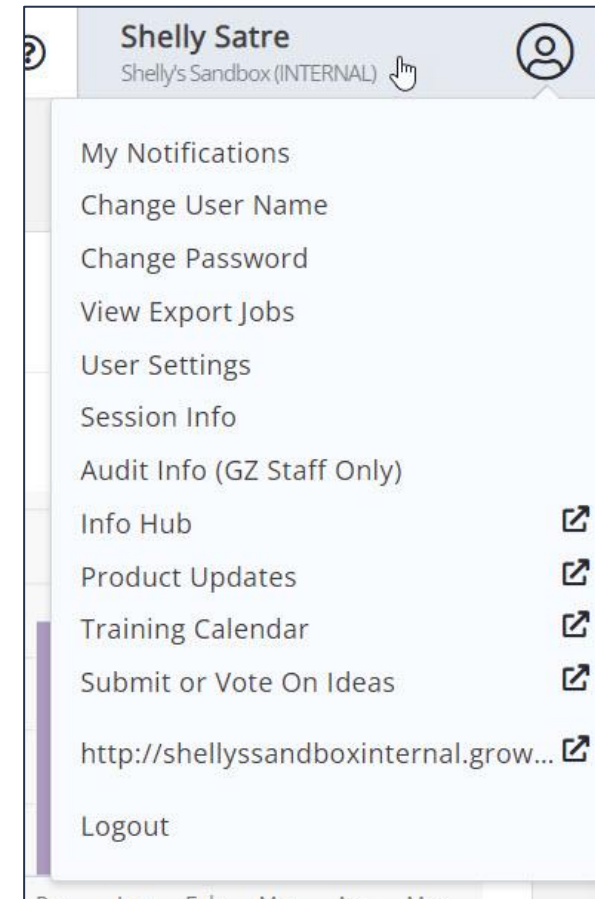
Search for articles, chat with Support, and submit a ticket all from one location!



Software Navigation – Add'l Options

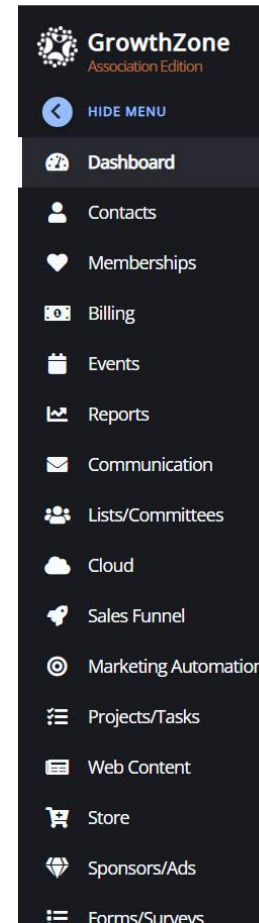
Options for the logged in staff member

- *Notifications*
- *Change User Name or Password*
- *View Export Jobs*
- *User Settings*
- *Session Info*
- Plus links to:
 - *Info Hub*
 - *Product Updates*
 - *Training Calendar*
 - *UserVoice*
 - *GZCMS website (if applicable)*



Navigation Panel

The Navigation Panel allows you to easily navigate to the module you want to work with



Workspace

When a module is selected in the Navigation Panel, details will be displayed in the workspace

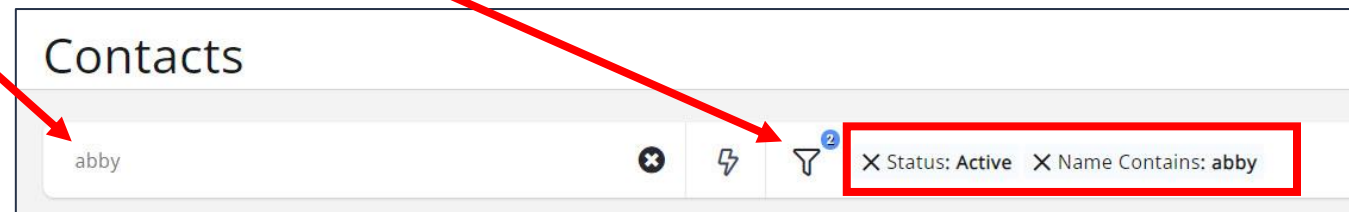
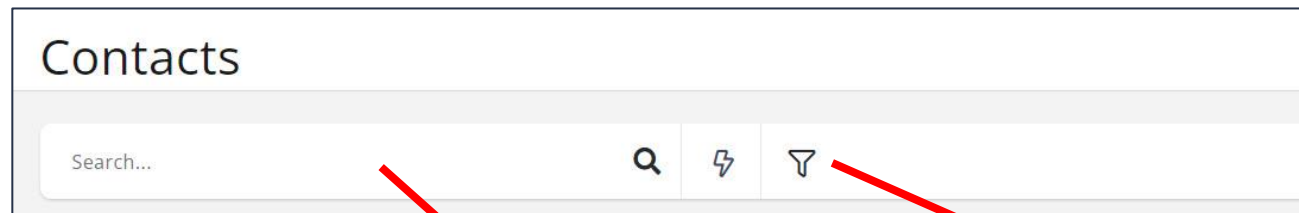
The screenshot shows the GrowthZone software interface. On the left is a dark navigation panel with the 'Contacts' module highlighted in red. The main workspace displays a 'Contacts' page with a search bar and a table of contact records. The table has columns for Type, Name, Status, Balance, Primary Connection, Primary Email, Primary Phone, and City. The 'Contacts' menu item in the navigation panel is highlighted with a red box.

Type	Name	Status	Balance	Primary Connection	Primary Email	Primary Phone	City
817-1 Indy		Courtesy	\$75.00	Org 817-1	817-1@mailinator.com		
A Place for Dogs		Non Member	\$0.00	Cami Benson			
Aaron Ashmore		Courtesy	\$1,200.00	March Ltd, LLC	aaron.ashmore@mailinator.com	218-820-4557	Deerwood
Abby Normal		Active	\$720.00	Abby's Smoke Shop	abby.normal@mailinator.com	218-456-1258	Crosby
Abby's Smoke Shop		Non Member	\$25.00	Abby Normal			
Adell Broadcasting		Non Member	\$0.00	Henry Higgins		586-790-3838	Mt Clemens
Adell Broadcasting - Detroit		Active	\$250.00			586-790-3838	Mt Clemens
Aiden Greene		Active	\$720.00	The Knit Shop	aiden@mailinator.com		
Alexander Wizard		Active	\$2,672.90	Wizards	alexander.wizard@mailinator.com	218-820-4558	Deerwood
Alicia Snow		Active	\$0.00	Snow Bound	alicia.snow@mailinator.com		Deerwood
Allison Greggs		Active	\$50.00	The Boutique	allison@mailinator.com		
Alpha Media Licensee LLC		Non Member	\$0.00	Arthur Langtry			Portland

Common Module Functions

Search Function – search functions are available throughout the software

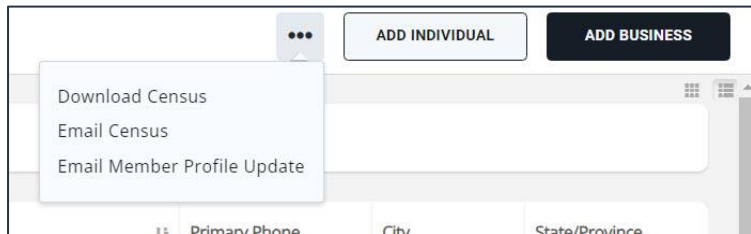
- *Type ahead search*
- *Quick Filter*
- *Customize Filter*



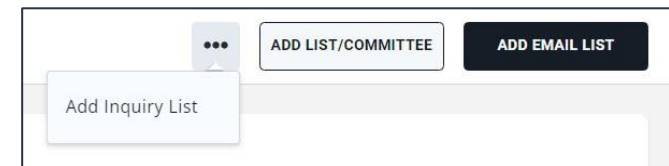
Common Module Functions

Add

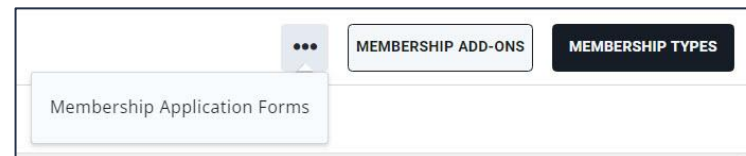
- *The module that you are using will dictate the options available*
- *The most commonly used options will be displayed on the button(s) in the upper right corner*



Contacts




Lists/Committees



Memberships

Common Module Functions

Changing displays from Cards to List and vice versa

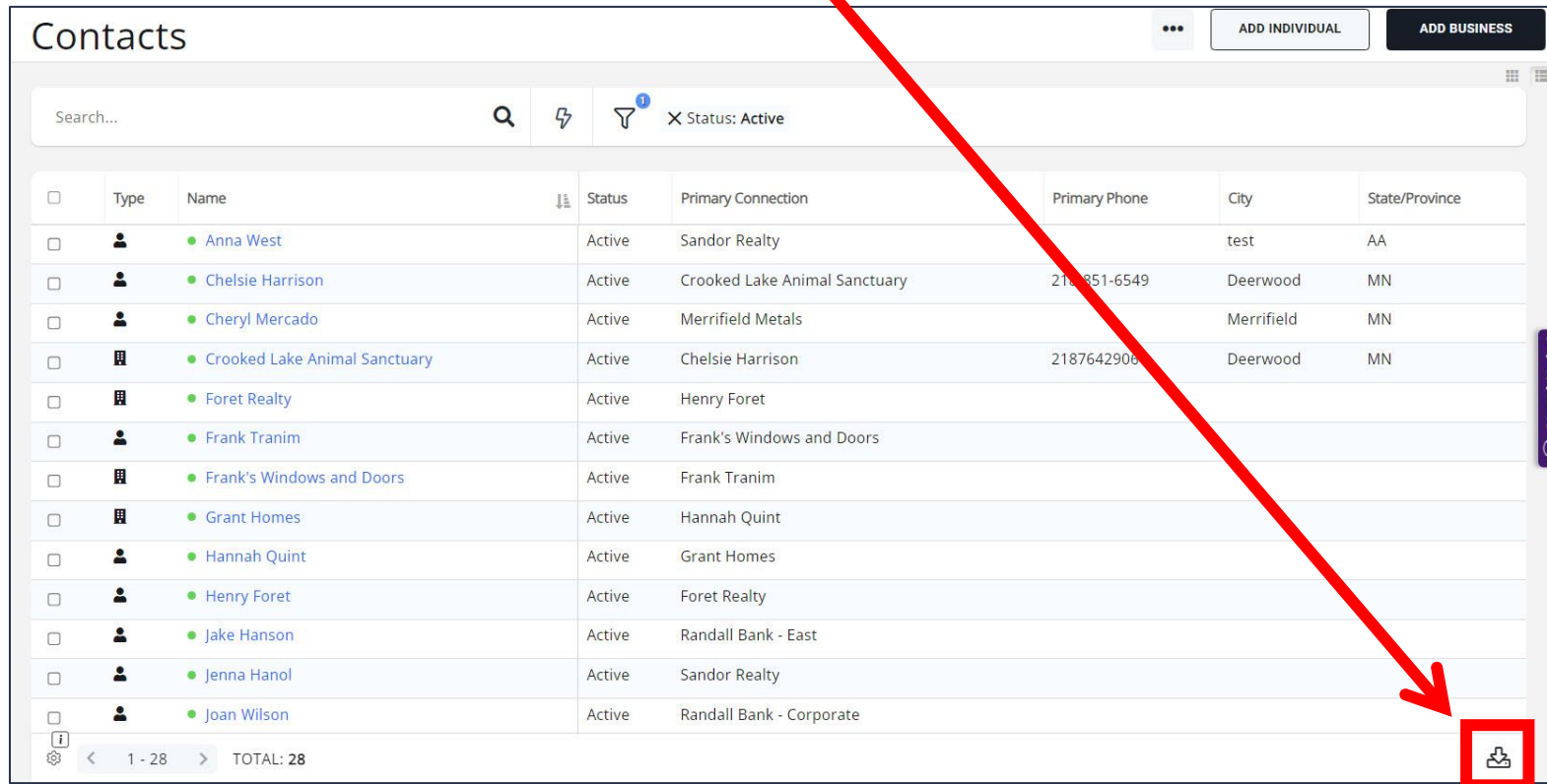


The screenshot shows the 'Contacts' module interface. At the top right, there are buttons for 'ADD INDIVIDUAL' and 'ADD BUSINESS'. Below these is a search bar with a search icon, a refresh icon, and a filter icon. A red arrow points to a view toggle button in the top right corner, which is highlighted with a red box. The button has a grid icon for 'Cards' view and a list icon for 'List' view.

<input type="checkbox"/>	Type	Name	Status	Primary Connection	Primary Phone	City	State/Province
<input type="checkbox"/>	Person	Anna West	Active	Sandor Realty		test	AA
<input type="checkbox"/>	Person	Chelsie Harrison	Active	Crooked Lake Animal Sanctuary	218-851-6549	Deerwood	MN
<input type="checkbox"/>	Person	Cheryl Mercado	Active	Merrifield Metals		Merrifield	MN

Common Module Functions






Downloading workspace display



The screenshot displays the 'Contacts' module interface. At the top, there are buttons for 'ADD INDIVIDUAL' and 'ADD BUSINESS'. Below these is a search bar and a filter set to 'Status: Active'. The main area contains a table of contacts with columns for Type, Name, Status, Primary Connection, Primary Phone, City, and State/Province. A red arrow points from the text 'Downloading workspace display' to a download icon (a square with a downward arrow) located in the bottom right corner of the interface, which is also enclosed in a red square box.

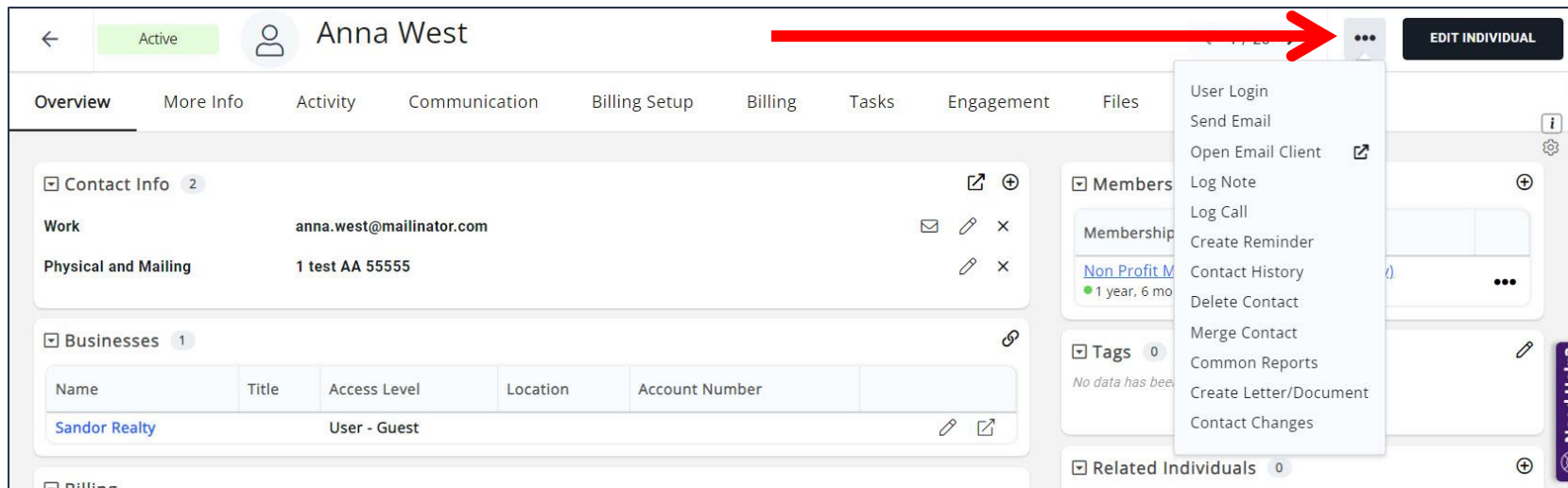
Type	Name	Status	Primary Connection	Primary Phone	City	State/Province
Individual	Anna West	Active	Sandor Realty		test	AA
Individual	Chelsie Harrison	Active	Crooked Lake Animal Sanctuary	218-851-6549	Deerwood	MN
Individual	Cheryl Mercado	Active	Merrifield Metals		Merrifield	MN
Business	Crooked Lake Animal Sanctuary	Active	Chelsie Harrison	2187642906	Deerwood	MN
Business	Foret Realty	Active	Henry Foret			
Individual	Frank Tranim	Active	Frank's Windows and Doors			
Business	Frank's Windows and Doors	Active	Frank Tranim			
Business	Grant Homes	Active	Hannah Quint			
Individual	Hannah Quint	Active	Grant Homes			
Individual	Henry Foret	Active	Foret Realty			
Individual	Jake Hanson	Active	Randall Bank - East			
Individual	Jenna Hanol	Active	Sandor Realty			
Individual	Joan Wilson	Active	Randall Bank - Corporate			

Other Common Functions

-  Edit
-  Add
-  Log in to Info Hub (as user)
-  Download
-  More Actions

Other Common Functions

- Clicking the ellipsis icon will display a list of the command tasks performed in the module or page
- Tasks will vary per module or page




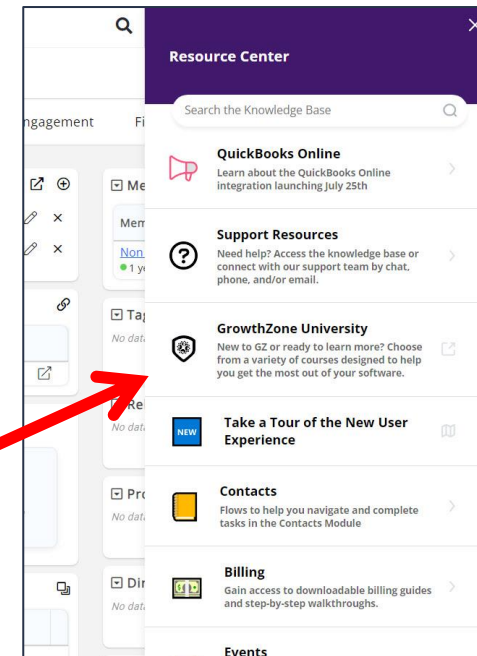
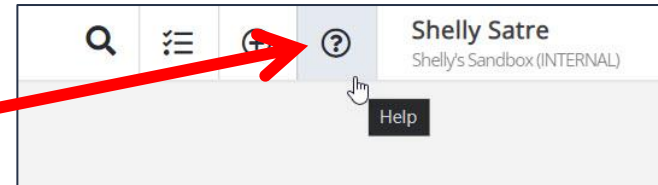
The screenshot shows a user profile page for 'Anna West'. At the top, there is a navigation bar with a back arrow, a status indicator 'Active', a user icon, and the name 'Anna West'. A red arrow points to an ellipsis icon (three dots) next to the name. Below the navigation bar is a horizontal menu with tabs: Overview, More Info, Activity, Communication, Billing Setup, Billing, Tasks, Engagement, and Files. The main content area is divided into several sections: 'Contact Info' (with sub-sections for Work and Physical and Mailing), 'Businesses' (with a table listing 'Sandor Realty'), 'Memberships' (with a table listing 'Non Profit M'), 'Tags' (with a note 'No data has been'), and 'Related Individuals'. A dropdown menu is open from the ellipsis icon, listing various actions: User Login, Send Email, Open Email Client, Log Note, Log Call, Create Reminder, Contact History, Delete Contact, Merge Contact, Common Reports, Create Letter/Document, and Contact Changes. A 'Need Help?' button is visible in the bottom right corner.

Name	Title	Access Level	Location	Account Number
Sandor Realty		User - Guest		

Other Common Functions

Help

- Accessible via the  in the header bar- this links directly to the Knowledge Base and can search for answers, submit a ticket, etc.
- Click the “Need Help?” button on the far right to expand the Resource Center flyout with additional documentation!



GrowthZone: Modules

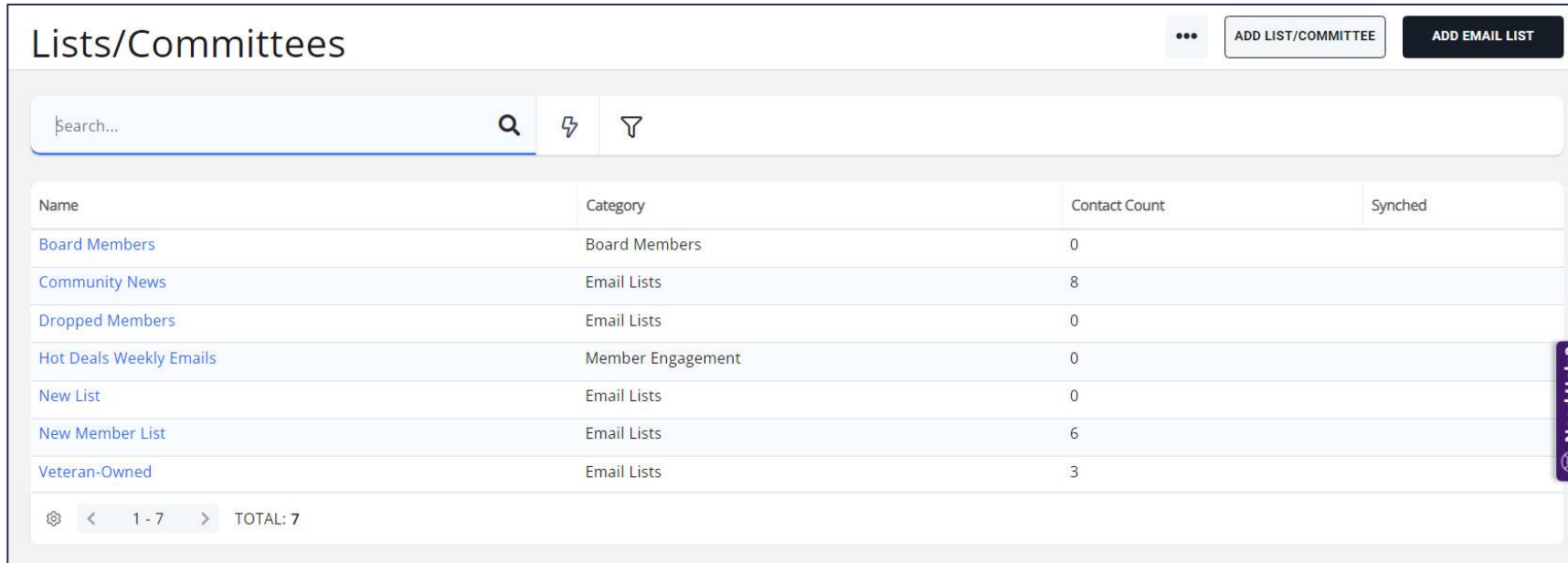
Grow Faster – Acquire New Members

- Lists/Committees
- Communications
- Contact Management
- Membership Management
- Chapters*
- Sales Funnel*

* Requires additional module subscription

Lists/Committees

The Lists/Committees module makes it easy to connect with and organize your members and individuals into groups for different types of communication



The screenshot displays the 'Lists/Committees' module interface. At the top, there are buttons for 'ADD LIST/COMMITTEE' and 'ADD EMAIL LIST'. Below these is a search bar with a search icon, a refresh icon, and a filter icon. The main content is a table with the following data:

Name	Category	Contact Count	Synced
Board Members	Board Members	0	
Community News	Email Lists	8	
Dropped Members	Email Lists	0	
Hot Deals Weekly Emails	Member Engagement	0	
New List	Email Lists	0	
New Member List	Email Lists	6	
Veteran-Owned	Email Lists	3	

At the bottom of the table, there is a pagination control showing '1 - 7' and 'TOTAL: 7'. A vertical 'Need Help?' button is located on the right side of the table.

Communications

The screenshot shows a web-based form for creating an email template. The form includes the following fields and options:

- Name***: Text input field containing "Membership Renewal Reminder Email Template".
- Description**: Text input field containing "Membership Renewal Reminder Email Template".
- Category***: Dropdown menu with "Membership renewal" selected.
- Subject***: Text input field containing "Your {{Membership}} is ready for renewal!".
- Template Text***: A rich text editor containing the following text:

Hello {{ContactName}},

Just a quick reminder that your {{Membership}} renewal is coming up on {{MExpirationDate}}.

As you know, being a {{Member}} of {{TENODisplayName}} gives you access to many benefits and opportunities.

To renew, simply click [here](#).

If you have any questions about your {{Membership}} or need more information, please give us a call or send us an email to arrange a time for us to connect.

Thank you for your continued support and partnership!

Best regards,

{{TENODisplayName}}

{{TENPPhoneNumber}}

{{TENEEmailAddress}}
- From Email Address**: A dropdown menu with a plus sign to the right.
- Make Available to All Users**
- Shows in Template list**
- ATTACH FILES**: A button to add attachments.
- Cancel** and **Done**: Buttons at the bottom right of the form.

Templates
Categorization
Automated Messaging/Notifications
Individual/Group Emails
E-mail Receipt Tracking

Contact Management

Contact Management allows you to easily track all important information about your contacts in one central location

Easily manage members activity, billing, and contact info in one central record

The screenshot displays the GrowthZone software interface for a contact named Anna West. The interface is organized into several sections:

- Contact Info:** Includes work email (anna.west@mailinator.com) and physical mailing address (1 test AA 5555).
- Businesses:** Lists Sandor Realty with the role of User - Guest.
- Billing:** Shows 0 scheduled billings, a \$0.00 balance, 0 billing notes, 0 payment profiles, and a 'None' tax set.
- Activity:** Shows a record for 5/30/2023: Cancelled Event Registration.
- Memberships:** Lists a Non Profit Membership - Org (Anniversary) with a 1-year, 6-months expiration date.
- Tags, Related Individuals, Professional, and Directory Listings:** All sections show 'No data has been added to this section'.

The interface also features a 'Need Help?' button on the right side and an 'EDIT INDIVIDUAL' button in the top right corner.

Membership Management

Membership Application Form

- *Integrated to your web-site*
- *If configured automatic notification to staff when an application is received*

MEMBERSHIP APPLICATION

Instructions

Thank you for your interest in our organization

Select An Option

- General Membership** \$1,200.00 Annually + \$25.00 Setup
- Premium Membership** \$2,000.00 Annually + \$25.00 Setup
- Platinum Membership** \$2,500.00 Annually + \$50.00 Platinum Membership Setup Fees

Enter Contact Information

First Name*

Last Name*

Sales Funnel*

Provides a clear view of the opportunities currently available, showing you the revenue that your organization can make in the months ahead

Add Sales Opportunity - ✕

Organization* Source Sales Person

Sales Category One-Time Revenue Recurring Revenue Estimated Close Date

Probability Stage Disposition Status*

Won/Lost Date

Sales Funnel*

Allows for tracking:

- *One time revenue*
- *Recurring revenue*
- *Probability of Sale*
- *Timeline*
- *Communications*
- *Tasks*

← Sales Funnel Report
⋮ RUN REPORT

Sales Persons

Sales Statuses

Sales Stages

Sales Dispositions

Sales Source

Sales Categories

Created Date Range

Won/Lost Date Range

Estimated Close Date

Probability

Membership Type

Fee Item

Additional Criteria / Filters +

Display Options

Fields to Display

Summarize By + Display Mode

Add Summarize By

Results: 15

Contact Name	Default Email	Default Phone	Sales Person	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Disposition	Timeline	Timeline Date
Abby's Smoke Shop			Ivy Archive	10/20/2023	\$599.00	\$0.00	\$599.00	Active		Initial Contact	Training - In Progress	Initial Contact	7/20/2023
Adell Broadcasting		586-790-3838	Shelly Satre		\$75.00	\$1,180.00	\$1,255.00	Won		Board Approved/Final Approval		Proposal Accepted	6/28/2023
Amanda's Pajamas	amanda.loreaan@mailinator.com		Shelly Wizard		\$1,200.00	\$0.00	\$1,200.00	Won		Proposal Sent		Initial Contact	5/4/2022
Bay Lake Coffee	baylakecoffee@mailinator.com	800-951-6525	Shelly Test	5/31/2022	\$100.00	\$500.00	\$600.00	Won		Initial Contact	Prospect - HOT	Initial Contact	4/22/2022
Bob's Builders			Jared Kincaid	10/31/2023	\$75.00	\$500.00	\$575.00	Active		Initial Contact	Prospect - HOT	Initial Contact	6/29/2023
Cally's Cupcakes	callycupcakes@mailinator.com		Shelly Wizard	9/30/2022	\$0.00	\$1,000.00	\$1,000.00	Active		Initial Contact	Prospect - HOT	Initial Contact	9/28/2022
Cam's Jammies	camis.jammies@mailinator.com	218-851-1616	Melissa Frame		\$0.00	\$1,000.00	\$1,000.00	Active		Initial Contact	Prospect - HOT	Initial Contact	9/26/2022
Crooked Lake Coffee	cheri.meyer@mailinator.com	218-764-8598	Camigwen Skytower	8/31/2021	\$50.00	\$1,120.00	\$1,170.00	Won		Board Approved/Final Approval	Prospect - HOT	1st Call	6/30/2021

Chapters*

The Chapters module allows you to tie membership applications, calendars, communications to chapter level

Chapters
Chapter Name
MN Veterinary Association Chapter
ND Vet Association
New Test Chapter
New Testing Chapter
SD Veterinary Association
Southwest Chapter
Texas Chapter
Wisconsin Veterinary Association

Retain & Engage Your Members

Events Management

Info Hub

Events Expo*

Sponsors/Ads*

Web Content*

Fundraising*

On-line Store*

Continuing Education*

* Requires additional module subscription

Events Management

The Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices.

SPRING WINE DINNER & AUCTION

[Back to Calendar](#)

i The Arboretum

🕒 Saturday, April 15, 2017 (7:00 PM - 11:00 PM)
Hors D'Oeuvres 7pm
Dinner 8pm
Dance 10pm

📞 218-546-5413

PRICING Four Course meal with wine selection \$75.00 per person. 20% discount applies to registrations received by March 8th.

📱 [f](#) [in](#) [t](#) [p](#)

Event Details

Join us at The Arboretum....
Annual Spring Wine Dinner & Auction



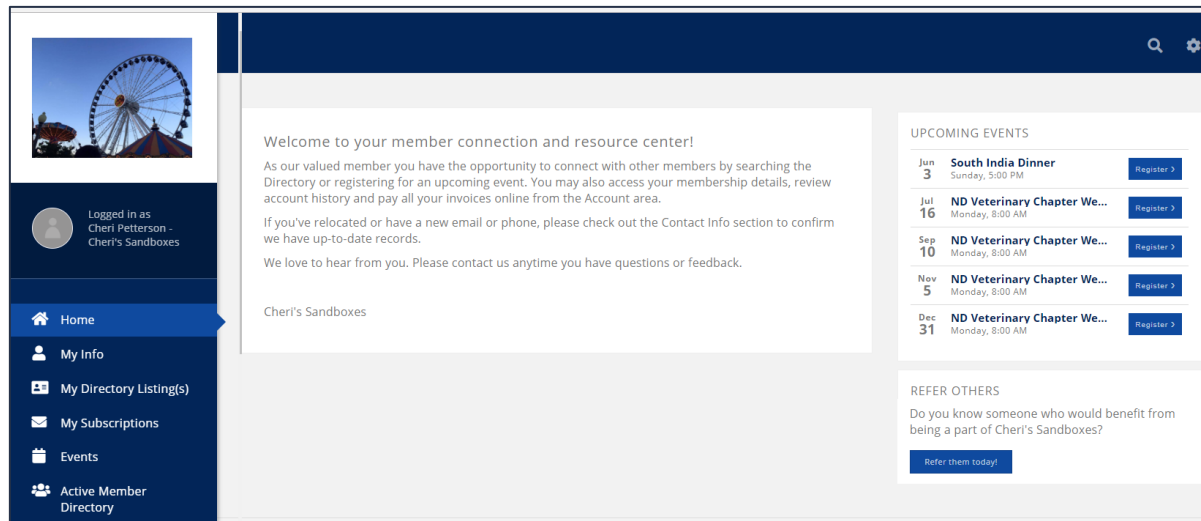
Additional Information

Event Contact:
Cheri Petterson
218-546-5413

Powered By MemberZone

Info Hub

- *Members can update your own information (photos, directory listing, website, etc.)*
- *Manage their account and pay their bills*
- *Register for Events, enter New Events*
- *Enter Hot Deals, Member to Member Deals, & Job Postings...*



The screenshot displays a member dashboard with a dark blue header and a light gray main content area. On the left, a vertical navigation menu includes a home icon, a user profile card for 'Cheri Petterson - Cheri's Sandboxes', and menu items for Home, My Info, My Directory Listing(s), My Subscriptions, Events, and Active Member Directory. The main content area features a welcome message, a list of upcoming events with dates and times, and a 'REFER OTHERS' section with a 'Refer them today!' button.

Welcome to your member connection and resource center!

As our valued member you have the opportunity to connect with other members by searching the Directory or registering for an upcoming event. You may also access your membership details, review account history and pay all your invoices online from the Account area.

If you've relocated or have a new email or phone, please check out the Contact Info section to confirm we have up-to-date records.

We love to hear from you. Please contact us anytime you have questions or feedback.

Cheri's Sandboxes

UPCOMING EVENTS

Jan 3	South India Dinner Sunday, 5:00 PM	Register >
Jul 16	ND Veterinary Chapter We... Monday, 8:00 AM	Register >
Sep 10	ND Veterinary Chapter We... Monday, 8:00 AM	Register >
Nov 5	ND Veterinary Chapter We... Monday, 8:00 AM	Register >
Dec 31	ND Veterinary Chapter We... Monday, 8:00 AM	Register >

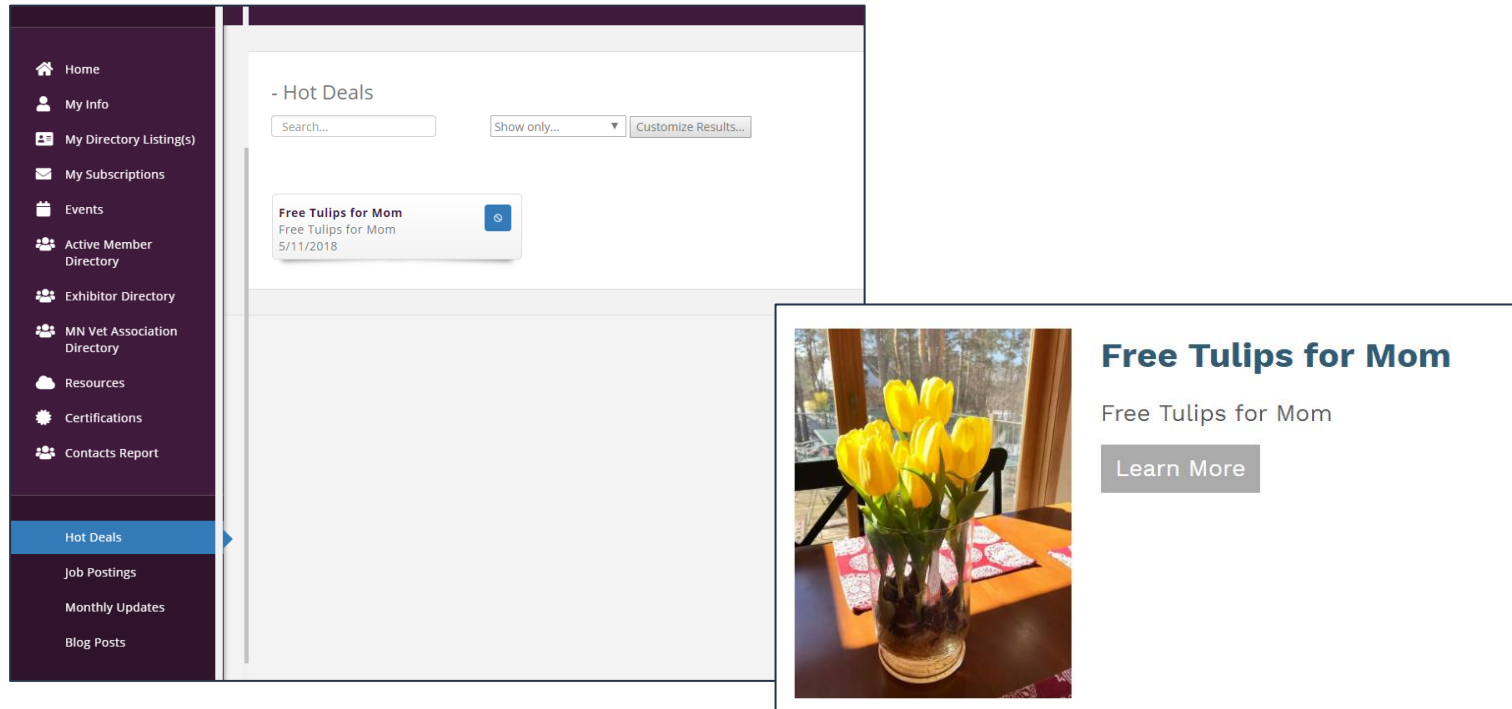
REFER OTHERS

Do you know someone who would benefit from being a part of Cheri's Sandboxes?

Refer them today!

Web Content*

- Provide additional benefits to members using hot deals, job postings and member to member hot deals



The image shows a screenshot of a web application interface. On the left is a dark purple sidebar with a list of navigation items: Home, My Info, My Directory Listing(s), My Subscriptions, Events, Active Member Directory, Exhibitor Directory, MN Vet Association Directory, Resources, Certifications, and Contacts Report. Below these is a 'Hot Deals' section with a blue arrow pointing right, and further down are 'Job Postings', 'Monthly Updates', and 'Blog Posts'. The main content area is titled '- Hot Deals' and contains a search bar, a 'Show only...' dropdown menu, and a 'Customize Results...' button. Below this is a card for 'Free Tulips for Mom' with the text 'Free Tulips for Mom' and '5/11/2018'. To the right of the main content area is a larger, detailed view of the 'Free Tulips for Mom' offer. It features a photograph of a vase of yellow tulips on a table. To the right of the photo, the text reads 'Free Tulips for Mom', 'Free Tulips for Mom', and a 'Learn More' button.

Events Expo Module*

With the Expo module, you can add sessions to your events, as well as manage event exhibitors

Annual Trade Show Sessions

[Back to Event](#) [Register for Event](#)



Patient Advocacy

Date: Breakout Session 10am - 11am
Location: Ballroom B

Speakers

Joe Lyons - Patient Advocate - LLC Hospital
Joe has been a leader in the healthcare industry for over 35 years. His career began in the clinical areas that include medical/surgical, emergency department, medical and respiratory intensive care. On the business side of healthcare, Joe has expertise in the area of Risk Management and Case Management in the areas of catastrophic case management, long term care and workers compensation. Through each of these experiences, Anne has been an advocate for the patient and family which has allowed her to have a broad scope of the practice and an understanding of how and why the area of professional patient advocacy is emerging as a key tool to engage patients to be active participants in their health and healthcare as the industry transitions to a patient and family centered healthcare system

Sponsors/Ads*

Edit Display Ad < 5 of 7 > ✕

Contact
Crooked Lake Coffee ✕

Description*
Crooked Lake Coffee

Start Date*
2/16/2022 📅


End Date
5/16/2023 📅

Advertisement Url
www.crookedlakecoffee.com Open In New Window

Ad Size [ⓘ]
[Dropdown] +

Width
468

Height
60

Display Ad Image


Placements

Page	Position	Category	
Active Member Directory	Top	-- Select Category --	[-]
End of Summer Bash	Top		[-]
EventCalendar	Top		[-]

+

Cancel Done

The Sponsors/Ads module provides options for offering advertising opportunities to your members

This will give them additional exposure, as well as bring in additional revenue to your association

Fundraising*

Help the community with fundraising campaigns and track donations

Book Sale Fundraiser

ADD DONATIONS EDIT CAMPAIGN

Summary Donation Activity Recurring Donors Donation Setup

General Information

Campaign Name: Book Sale Fundraiser

Campaign Status: Active

Start Date: 12/4/2020

End Date: 12/31/2020

Description: Selling books using the fundraising module

Primary Contact

Goal Amount

Donation Statistics

Number of Donations: 0

Total Donations Made: \$0.00

Current Amount Paid: \$0.00

Remaining Pledged Amount: \$0.00

Remaining to Goal

Book Sale Fundraiser

ADD DONATIONS EDIT CAMPAIGN

Summary **Donation Activity** Recurring Donors Donation Setup

Search...

Contact	Description	Total	Paid	Type	Transaction Date	Ref #	Actions
Ivy Archive	Book Sale	\$55.00	\$0.00	One Time Donation	8/2/2023	698	
Harry Dresden	Book Sale	\$35.00	\$0.00	One Time Donation	8/2/2023	699	

1 - 2 TOTAL: 2

Need Help?




Store*

The Store Module is a module that allows the association to sell additional resources/products to members

The integrated into your GrowthZone Software, makes selling and processing orders as simple as possible

CHERI'S SANDBOX STORE

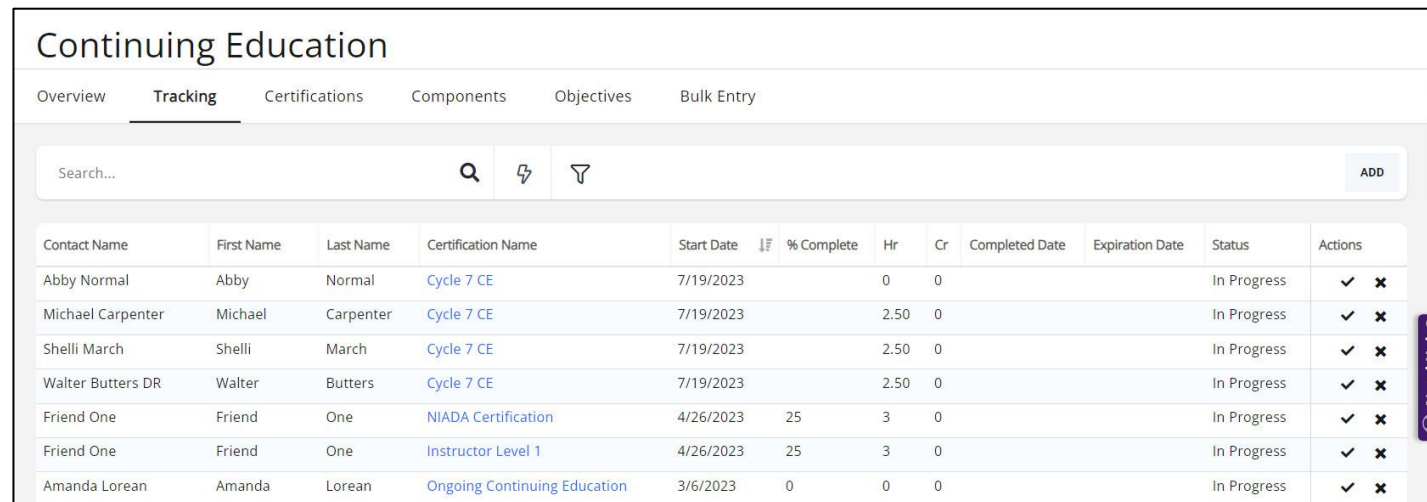
Welcome to our Store.... find all of your lakes logo gear at the tip of your fingers

		
LOGO T-SHIRT	LOGO BACKPACK	LOGO BASEBALL CAPS
\$ 40.00	\$ 50.00	\$ 25.00
Details	Details	Details
Add To Cart	Add To Cart	Add To Cart

Continuing Education*

The Continuing Education module allows you to track certifications/continuing education events for your members

- *Track hours*
- *Track Requirements*
- *Provide Certificates*



The screenshot displays the 'Continuing Education' module interface. It features a navigation bar with tabs for 'Overview', 'Tracking' (selected), 'Certifications', 'Components', 'Objectives', and 'Bulk Entry'. Below the navigation is a search bar with a search icon, a lightning bolt icon, a filter icon, and an 'ADD' button. The main content area is a table with the following columns: Contact Name, First Name, Last Name, Certification Name, Start Date, % Complete, Hr, Cr, Completed Date, Expiration Date, Status, and Actions. The table contains seven rows of data, including members like Abby Normal, Michael Carpenter, Shelli March, Walter Butters DR, and Amanda Lorean.

Contact Name	First Name	Last Name	Certification Name	Start Date	% Complete	Hr	Cr	Completed Date	Expiration Date	Status	Actions
Abby Normal	Abby	Normal	Cycle 7 CE	7/19/2023	0	0				In Progress	✓ ✕
Michael Carpenter	Michael	Carpenter	Cycle 7 CE	7/19/2023	2.50	0				In Progress	✓ ✕
Shelli March	Shelli	March	Cycle 7 CE	7/19/2023	2.50	0				In Progress	✓ ✕
Walter Butters DR	Walter	Butters	Cycle 7 CE	7/19/2023	2.50	0				In Progress	✓ ✕
Friend One	Friend	One	NIADA Certification	4/26/2023	25	3	0			In Progress	✓ ✕
Friend One	Friend	One	Instructor Level 1	4/26/2023	25	3	0			In Progress	✓ ✕
Amanda Lorean	Amanda	Lorean	Ongoing Continuing Education	3/6/2023	0	0	0			In Progress	✓ ✕

Do More with Less Time

Billing

Reporting

Forms/Surveys*

Project Management*

Marketing Automation*

* Requires additional module subscription

Billing

- *Easy creating of invoices*
- *Accepting Payments*
- *GrowthZone Pay*

Billing

Overview Pending Delivery Payments Sales/Invoices Upcoming Billing Deposits Credit Memos Accounting Summary

Invoicing

39	Invoices Ready to Email	\$17,130.17
0	Invoices Ready to Print	\$0.00
0	Invoices Ready to Print and Email	\$0.00

Payments

17	Undeposited Payments	\$25,493.80
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Open Invoices

as of August 02, 2023

Reports

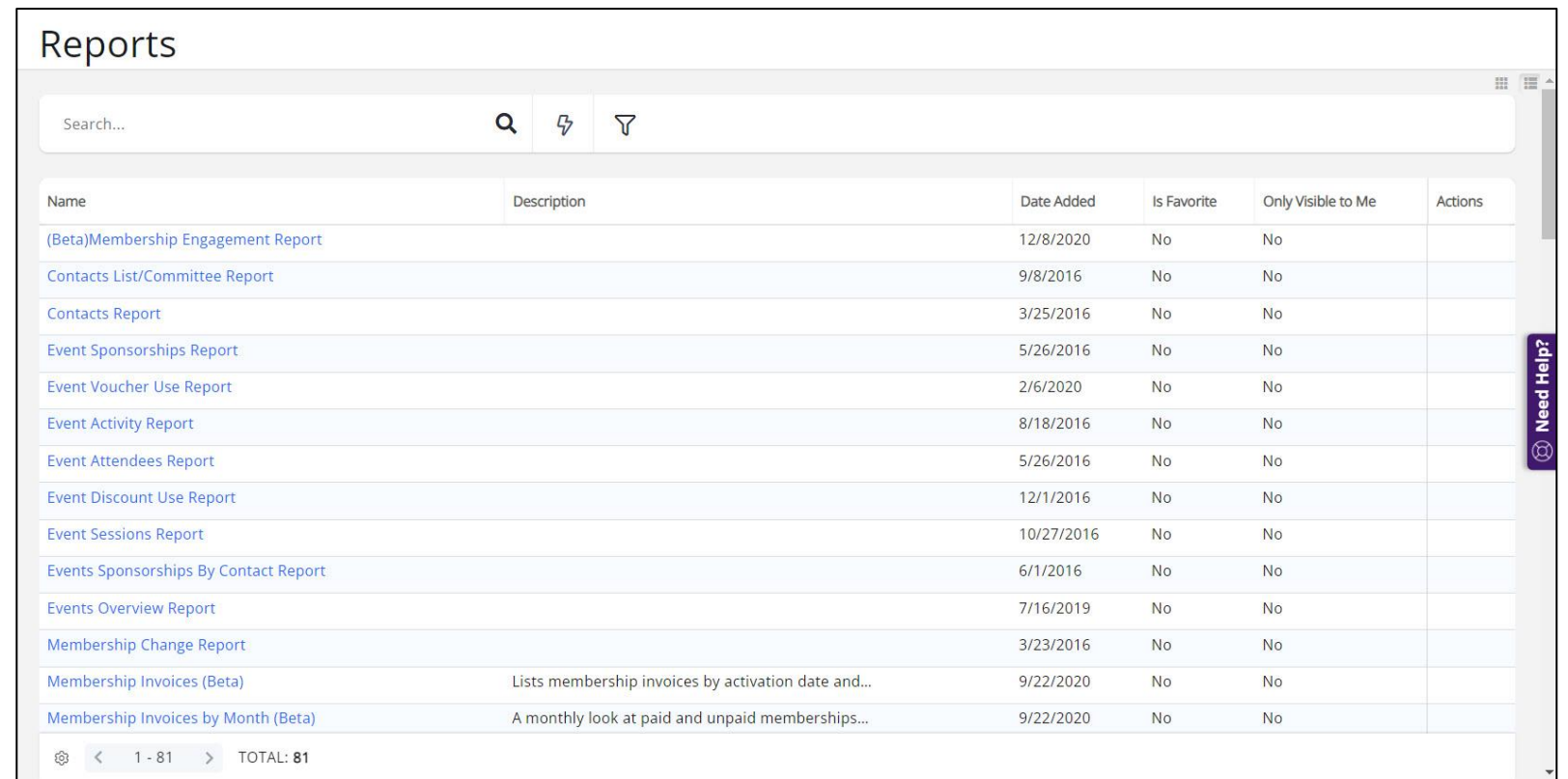
- Credit Card Processing**
 - Payment Processing Report
 - Stored Payment Profiles Report
- Banking**
 - Cash Receipts Report
 - Deposit Report
 - Deposit Summary Report
- Collections**
 - Collections By Member Report
 - Collections Details Report
 - Invoice Schedule to be Paid
 - Open Invoices Report
 - Open Invoices Report - 30 Days Overdue
 - Open Invoices Report - 60 Days Overdue
 - Open Invoices Report - 90 Days Overdue
- Accounting General Ledger**
 - Accounting Transaction Report
 - Accounts Receivable Aging Details
 - Accounts Receivable Aging Summary
 - Accounts Receivable by Product
 - Cash A/R for 2020
 - Closed Period Report
 - Export Accounting Transactions
 - Recognized Income Report
 - Revenue Recognition Report
 - Sales By Account Report

Need Help?

Reporting

Wide variety of reports for you to analyze all aspects of your organization

Customizable to meet your needs



The screenshot displays a web interface titled "Reports". At the top, there is a search bar with a search icon, a refresh icon, and a filter icon. Below the search bar is a table listing various reports. The table has six columns: Name, Description, Date Added, Is Favorite, Only Visible to Me, and Actions. The reports listed include (Beta)Membership Engagement Report, Contacts List/Committee Report, Contacts Report, Event Sponsorships Report, Event Voucher Use Report, Event Activity Report, Event Attendees Report, Event Discount Use Report, Event Sessions Report, Events Sponsorships By Contact Report, Events Overview Report, Membership Change Report, Membership Invoices (Beta), and Membership Invoices by Month (Beta). The bottom of the table shows a pagination bar with a gear icon, a left arrow, "1 - 81", a right arrow, and "TOTAL: 81". On the right side of the interface, there is a vertical button labeled "Need Help?" with a question mark icon.

Name	Description	Date Added	Is Favorite	Only Visible to Me	Actions
(Beta)Membership Engagement Report		12/8/2020	No	No	
Contacts List/Committee Report		9/8/2016	No	No	
Contacts Report		3/25/2016	No	No	
Event Sponsorships Report		5/26/2016	No	No	
Event Voucher Use Report		2/6/2020	No	No	
Event Activity Report		8/18/2016	No	No	
Event Attendees Report		5/26/2016	No	No	
Event Discount Use Report		12/1/2016	No	No	
Event Sessions Report		10/27/2016	No	No	
Events Sponsorships By Contact Report		6/1/2016	No	No	
Events Overview Report		7/16/2019	No	No	
Membership Change Report		3/23/2016	No	No	
Membership Invoices (Beta)	Lists membership invoices by activation date and...	9/22/2020	No	No	
Membership Invoices by Month (Beta)	A monthly look at paid and unpaid memberships...	9/22/2020	No	No	

Forms/Surveys*

Use Forms/Surveys to create online forms or insert links into emails to encourage and track responses

Forms/Surveys ADD

Search... 🔍 ⚡ ⚙

Name	Form Type	Total Responses	📅	Latest Response	Actions
Form 2022	User defined	12		3/14/2023	⋮
RGCDC Test Form 1	User defined	8		6/30/2021	⋮
Copy of RGCDC Test Form 1	User defined	8		5/5/2022	⋮
Show us your costume!	User defined	3		1/3/2020	⋮
September Form	User defined	3		9/15/2021	⋮
SCCAOR Form	User defined	2		8/17/2022	⋮
form example	User defined	<No Total Responses>			⋮
Copy of 2021 Form	User defined	<No Total Responses>			⋮
Certification Submission	User defined	<No Total Responses>			⋮
OSSA Volunteer Hours	User defined	<No Total Responses>			⋮
2022 Scholarship Applications Vote	User defined	<No Total Responses>			⋮
April 2022 Form	User defined	<No Total Responses>			⋮
Test form April 2022	User defined	<No Total Responses>			⋮
Tutor Application	User defined	<No Total Responses>			⋮

⚙ < 1 - 22 > TOTAL: 22





Need Help?

Project Management*


Streamline processes for membership acquisition, membership on-boarding, event planning...

Projects/Tasks

Projects Tasks Task Calendar

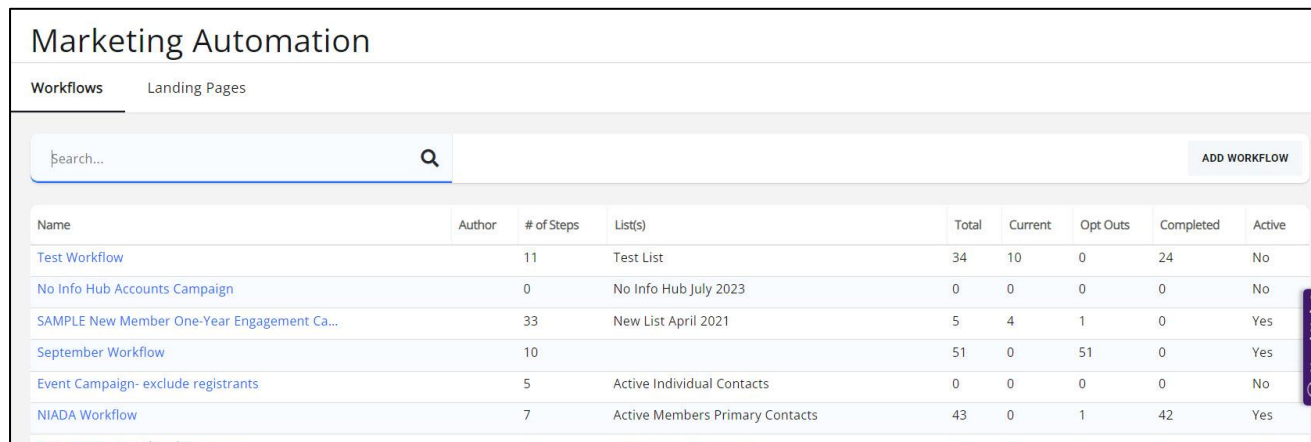
Search...     Status: 0 ADD

Name	Type	Start Date	Status	Owner	Last Project Communication
Project for Allison Greggs membership	New Member Onboarding	7/14/2023	Active		
Project for Abby Normal membership	New Member Onboarding	7/14/2023	Active		
Project for Aiden Greene membership	New Member Onboarding	7/12/2023	Active		
Web Lead: Bob's Builders	Sale	6/29/2023	Active	Jared Kincaid	6/29/2023
Prospect member	Sale	3/6/2023	Active	Shelly Test	
New member	Sale	2/22/2023	Active	Melissa Frame	
new member	Sale	1/31/2023	Active	Melissa Frame	
Golf event	Concert/Camping/Vendor event	12/5/2022	Active	Melissa Frame	

 Need Help?

Marketing Automation*

- The GrowthZone Marketing Automation module provides the functionality to set up automated workflows designed specifically around varying communication goals.
- For example, you may want to have a workflow for new prospects, or perhaps a drip campaign for new members. Workflows are tied to lists, which allows you to automatically send targeted information to key individuals and groups.



The screenshot displays the 'Marketing Automation' interface. At the top, there are tabs for 'Workflows' and 'Landing Pages'. Below the tabs is a search bar with a magnifying glass icon and a search button. To the right of the search bar is an 'ADD WORKFLOW' button. The main content is a table with the following columns: Name, Author, # of Steps, List(s), Total, Current, Opt Outs, Completed, and Active. The table contains several rows of workflow data.

Name	Author	# of Steps	List(s)	Total	Current	Opt Outs	Completed	Active
Test Workflow		11	Test List	34	10	0	24	No
No Info Hub Accounts Campaign		0	No Info Hub July 2023	0	0	0	0	No
SAMPLE New Member One-Year Engagement Ca...		33	New List April 2021	5	4	1	0	Yes
September Workflow		10		51	0	51	0	Yes
Event Campaign- exclude registrants		5	Active Individual Contacts	0	0	0	0	No
NIADA Workflow		7	Active Members Primary Contacts	43	0	1	42	Yes
Excess 2022 - Completed Responses		8	Excess 2022 - Responses	10	0	0	10	Yes

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 »](#)

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

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