

# GrowthZone Solution Overview



# Agenda

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System Navigation

Overview of GrowthZone Modules

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

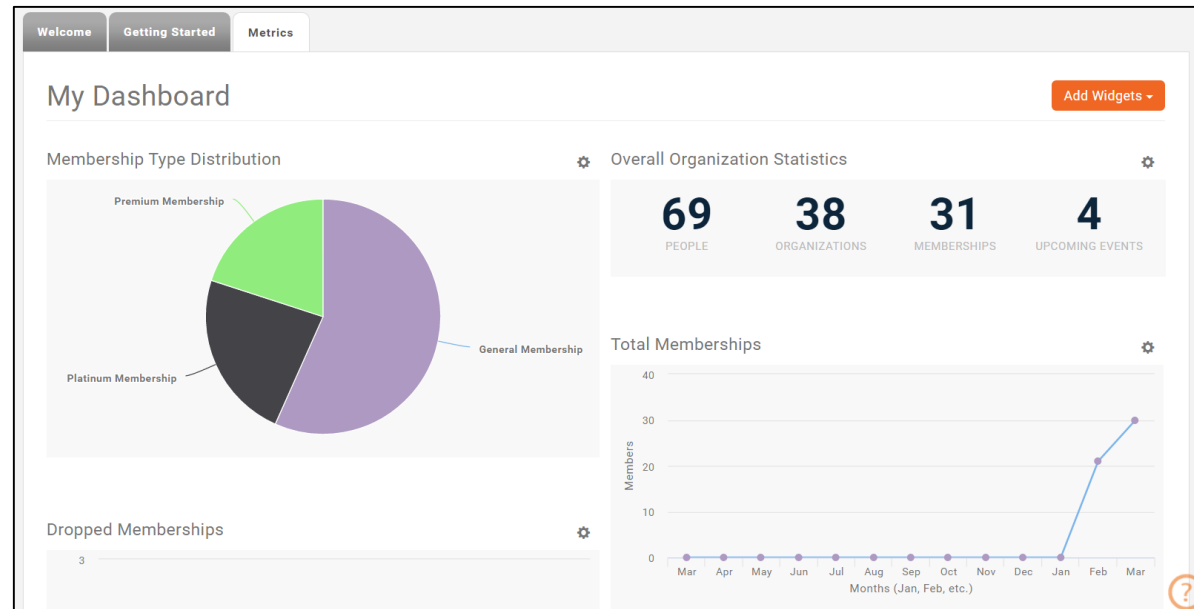
Easy to use, and designed to manage all the day-to-day operations of your organization

## Three Different Views

- Staff/Database View
- Member View
- Public View

# Overview – Staff View - Database

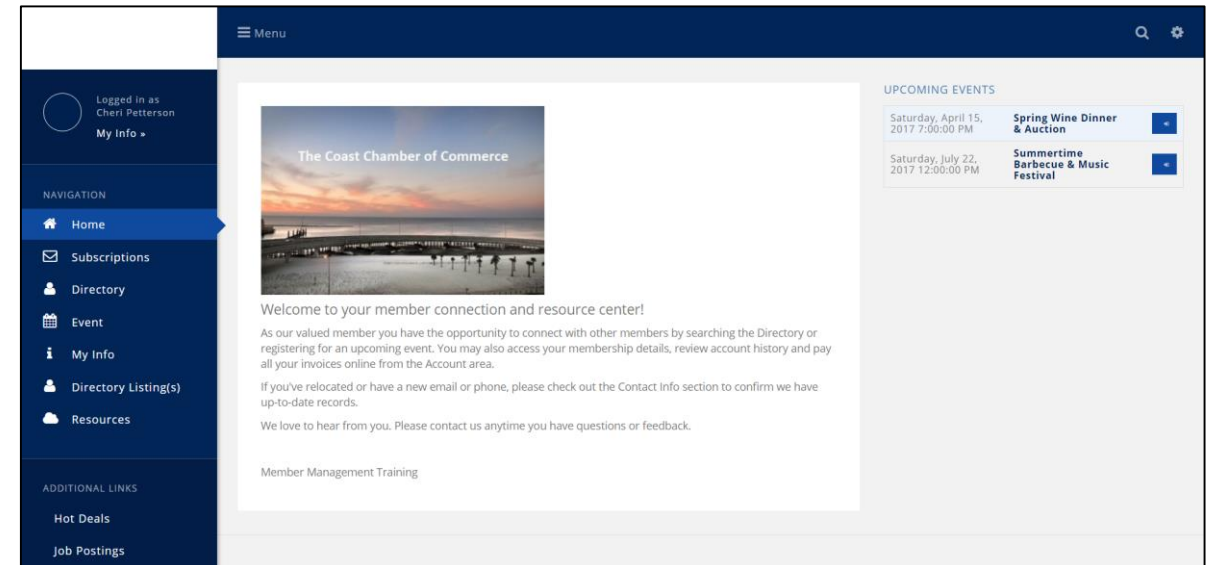
Where you will be able to manage all of your contacts and members, manage your events, generate and analyze reports, and work with the modules that you have selected



# Overview – Member View - InfoHub

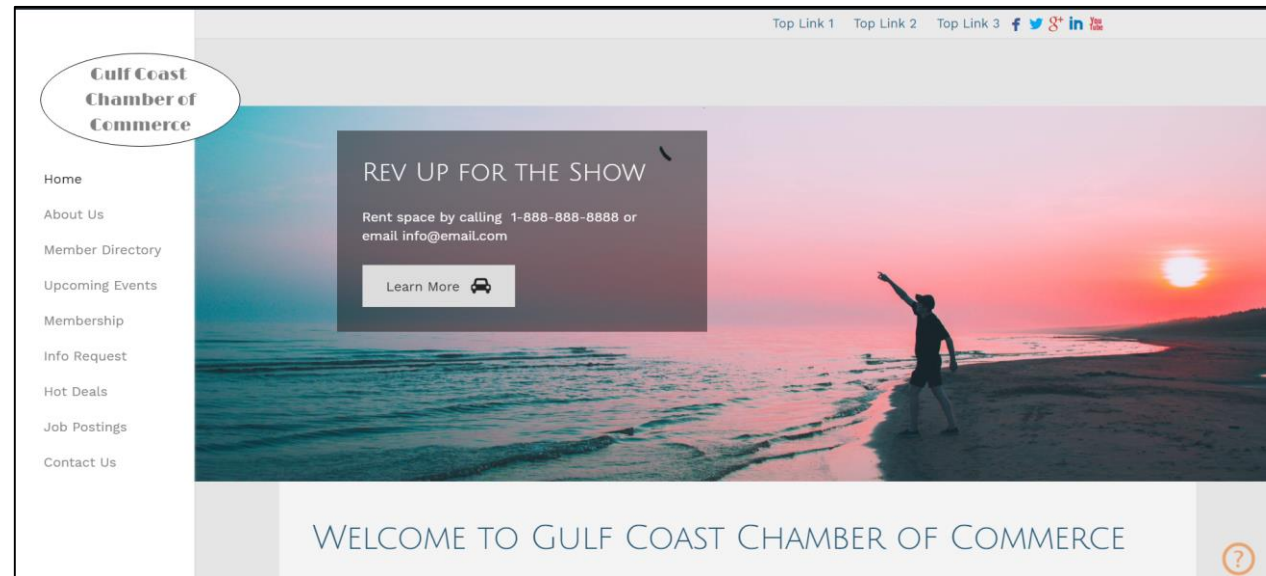
## Members can

- 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...



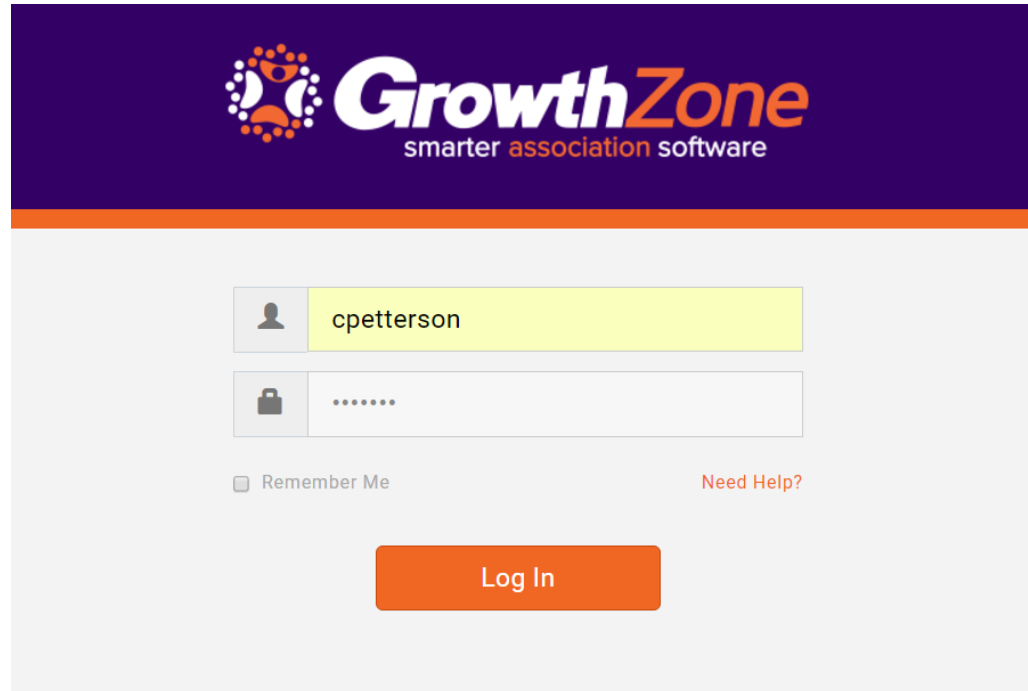
# Overview – Website – Public View

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



# Staff View - Database

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



The image shows a login form for GrowthZone. At the top, there is a dark purple header with the GrowthZone logo and the text "GrowthZone smarter association software". Below the header is a light gray login form. The form contains two input fields: the first is for the username, with the text "cpetterson" entered; the second is for the password, with six dots representing the masked text. Below the password field, there is a checkbox labeled "Remember Me" and a link labeled "Need Help?". At the bottom of the form is a large orange button labeled "Log In".



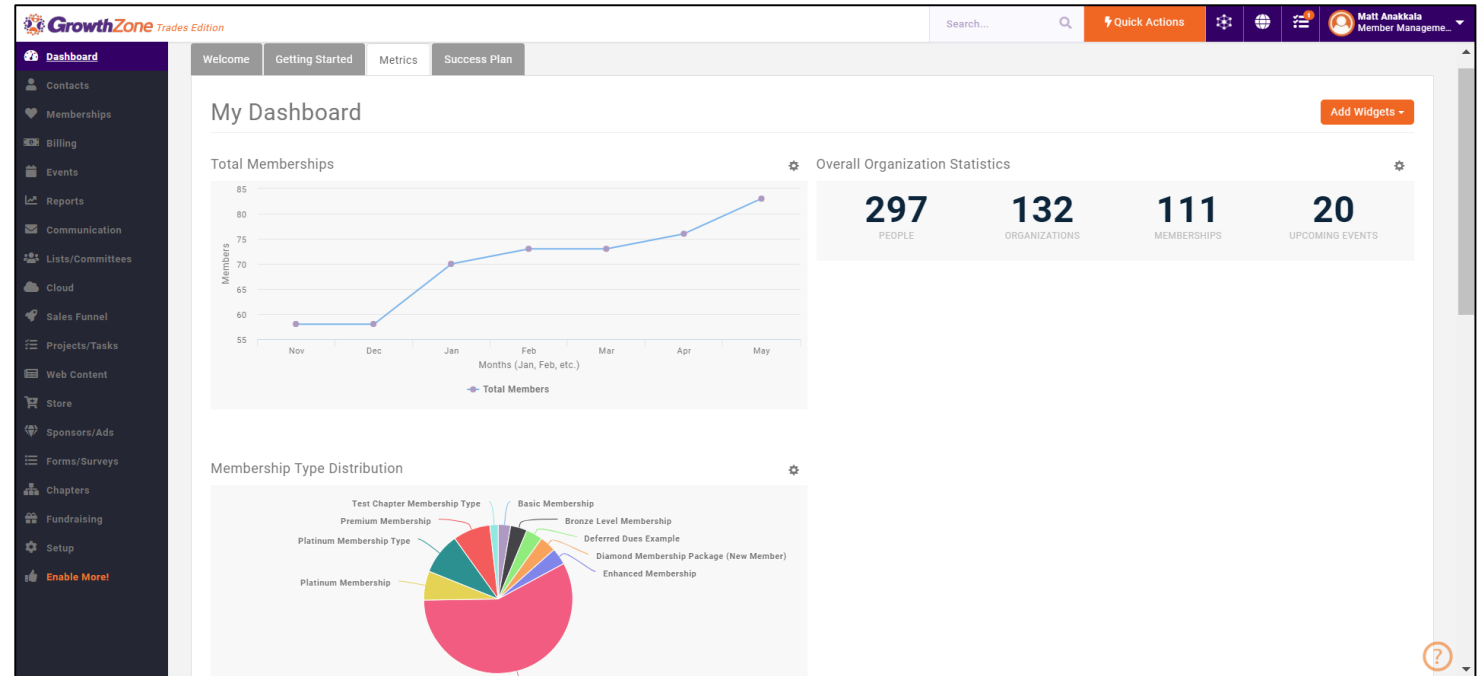
# Staff View – Database Navigation

Header

Navigation Panel

WorkSpace

Common Functions



## Search

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



# Software Navigation – Quick Actions

Add Contacts...

Add Notes...

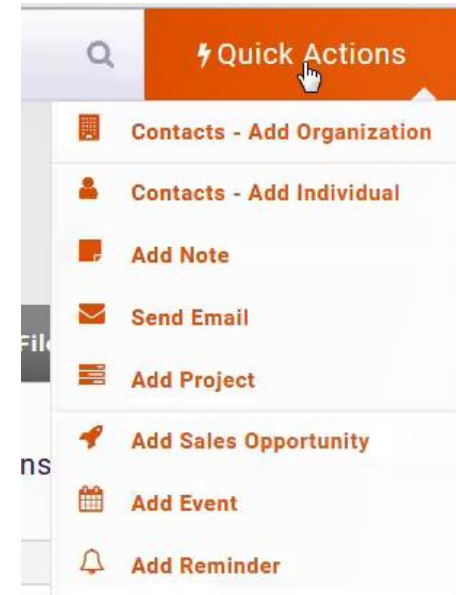
Send Emails...

Add Projects...

Add Sales Opportunity...

Add Events...

Add Reminders...



# Software Navigation – Quick Actions

## Example

### Add Contacts - Organization

**Add/Edit Organization** 🔍 ✕

Name

Phone, email, or website  + ✕

Address  City  State Province  Postal Code  Country  Type  + ✕

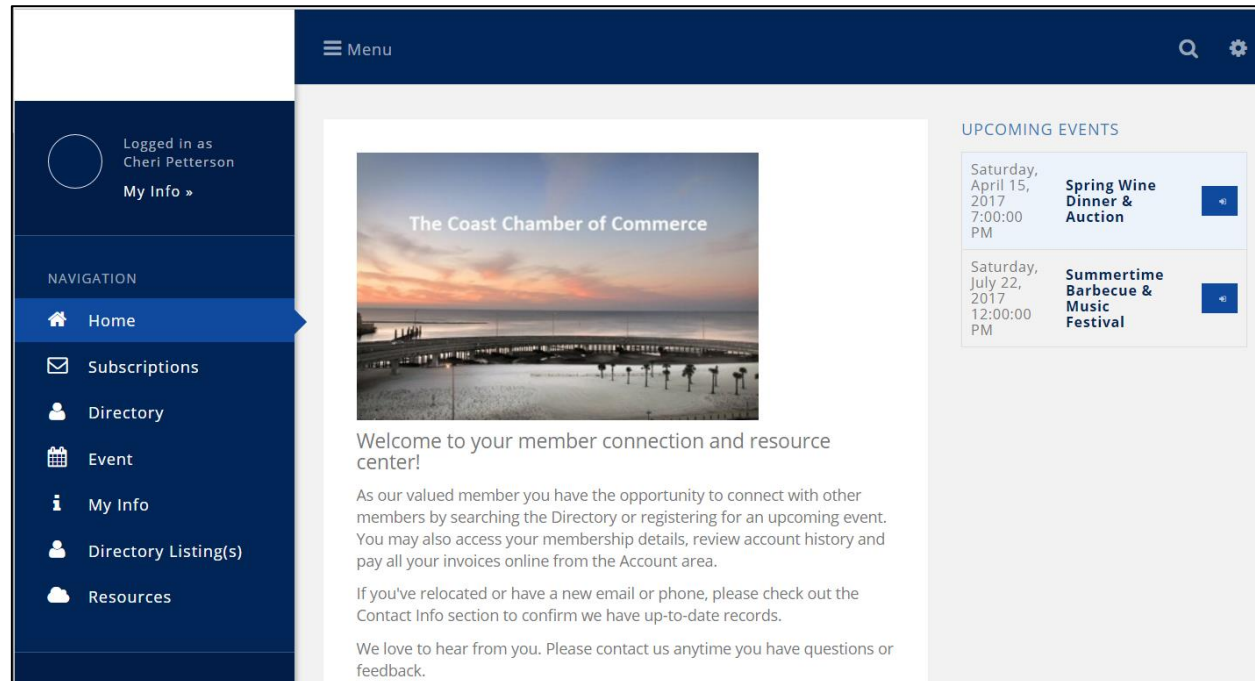
**Individuals (Optional)**

First Name  Last Name  Title  + ✕

Cancel Done

# Software Navigation – Access to InfoHub

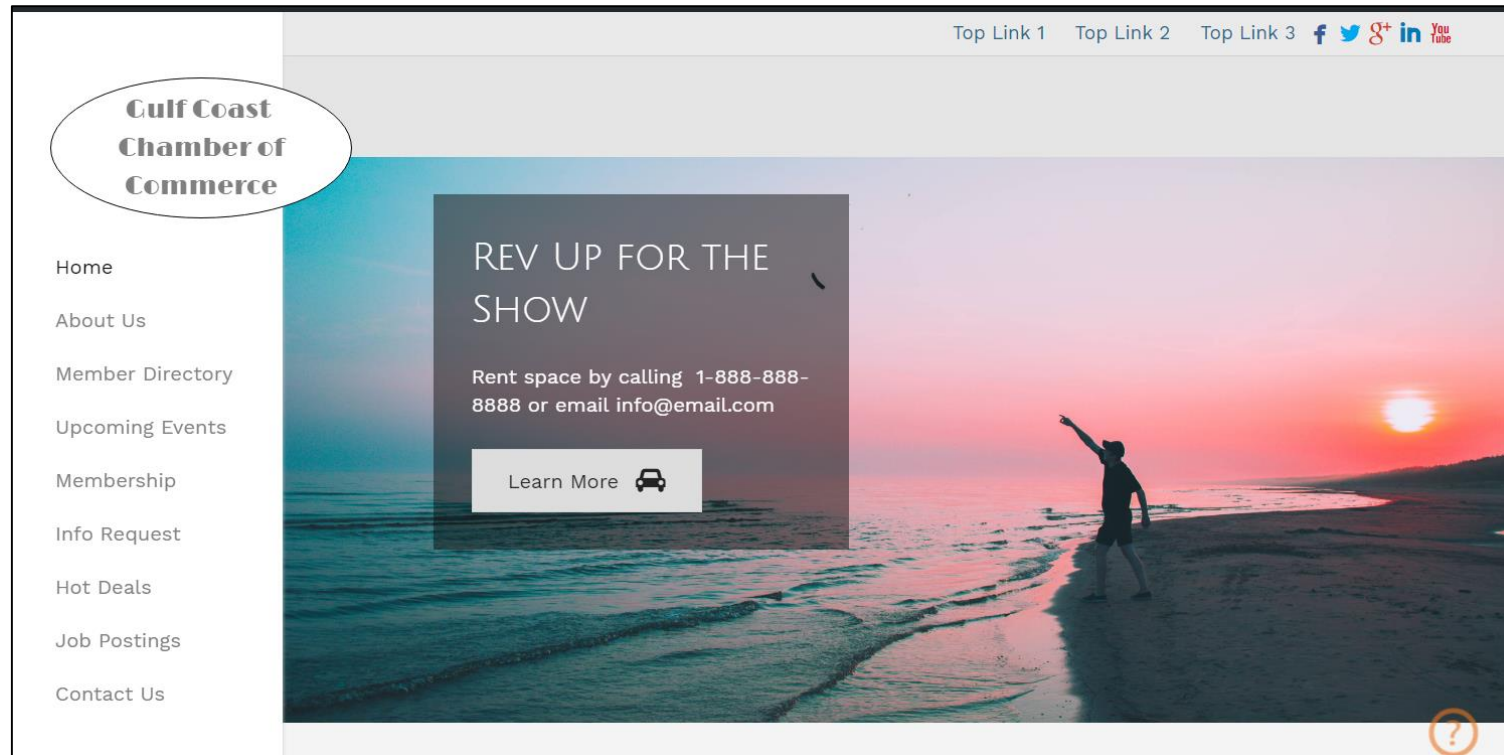
The logged on user can access the Info Hub by clicking



The screenshot displays the InfoHub interface for a logged-in user. The top navigation bar is dark blue with a 'Menu' icon, a search icon, and a settings icon. The left sidebar is dark blue and contains the following items: 'Logged in as Cheri Petterson My Info »', 'NAVIGATION' section with 'Home' (highlighted), 'Subscriptions', 'Directory', 'Event', 'My Info', 'Directory Listing(s)', and 'Resources'. The main content area features a header image for 'The Coast Chamber of Commerce' with a sunset background. Below the image is a welcome message: 'Welcome to your member connection and resource center!'. The text continues: '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.' On the right side, there is an 'UPCOMING EVENTS' section with two entries: 'Spring Wine Dinner & Auction' on Saturday, April 15, 2017, from 7:00:00 PM to 7:00:00 PM; and 'Summertime Barbecue & Music Festival' on Saturday, July 22, 2017, from 12:00:00 PM to 12:00:00 PM. Each event entry has a blue arrow icon to its right.

# Software Navigation – Access to your Website GrowthZone smarter association software

You can view your website by clicking



# Software Navigation – Assigned Tasks

Go to your list of Assigned tasks

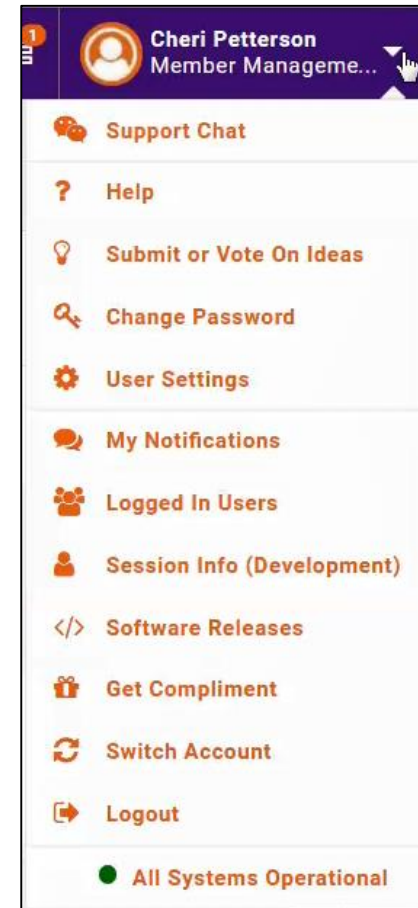


Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
		<a href="#">Follow-up Reminder for Cheri Petterson</a>	Normal		<a href="#">Adrian Chavez</a>	Cheri Petterson	3/16/2017		0
		<a href="#">Follow-up Reminder for Cheri Petterson</a>	Normal	Member Acquisition	<a href="#">Adrian Chavez</a>	Cheri Petterson	3/17/2017		0
		<a href="#">Follow up with Claude Monet</a>	Normal		<a href="#">Monet's Landscaping</a>	Cheri Petterson	3/20/2017	3/16/2017	100

# Software Navigation – Additional Options

Additional options for the logged in staff member

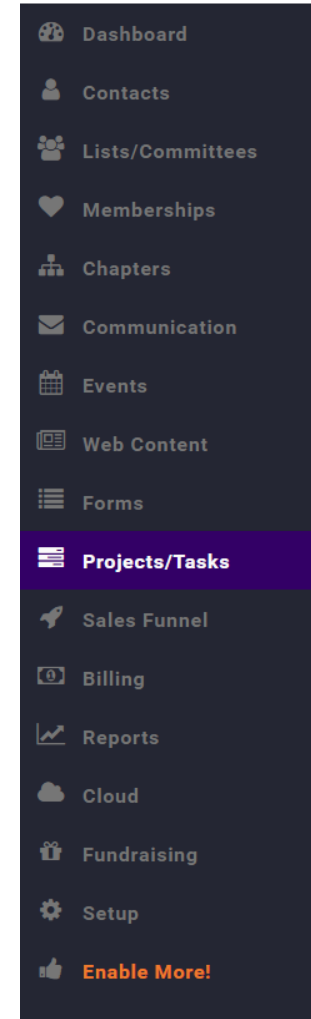
- Chat
- Help
- Submit or Vote on Ideas
- Change Password
- User Settings
- My Notifications
- Logged In Users
- Software Releases
- Get Compliment
- Switch Account
- Logout
- System Status





# Navigation Panel

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



When a module is selected in the Navigation Panel – details will be displayed in the work space

Search... Individuals Customize Results... ContactType:Individual x [Clear All] + Add Organization

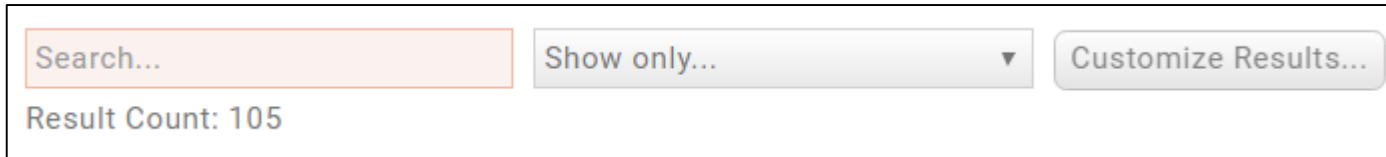
Result Count: 69

Type	Name	Balance	Primary Connection	Status	Primary Email	Primary Phone	City	State Province
	<a href="#">Cheri Petterson</a>	\$337.00	Member Management Training	Non Member	cheri.petterson@micronetonline.com	218-546-5413		
	<a href="#">Johnny Ocean</a>	\$0.00		Non Member		218-999-8722		
	<a href="#">Brandon Zinda</a>	\$0.00	Member Management Training	Non Member	brandon.zinda@micronetonline.com			
	<a href="#">Susan Williams</a>	\$0.00	Member Management Training	Non Member	susan.williams@micronetonline.com			
	<a href="#">Andrea Anderson</a>	\$0.00	Member Management Training	Non Member	andrea.anderson@micronetonline.com			
	<a href="#">Michael Samuelson</a>	\$0.00	Member Management Training	Non Member	michael.samuelson@micronetonline.com			
	<a href="#">James Petterson</a>	\$0.00	Member Management Training	Non Member	lacherie_2000@yahoo.com	218-546-5413		
	<a href="#">Greg Lamar</a>	\$0.00		Non Member				
	<a href="#">Wilma Lamar</a>	\$0.00		Non Member				
	<a href="#">Joe Wolner</a>	\$0.00	Cuyuna Golf Club	Non Member				

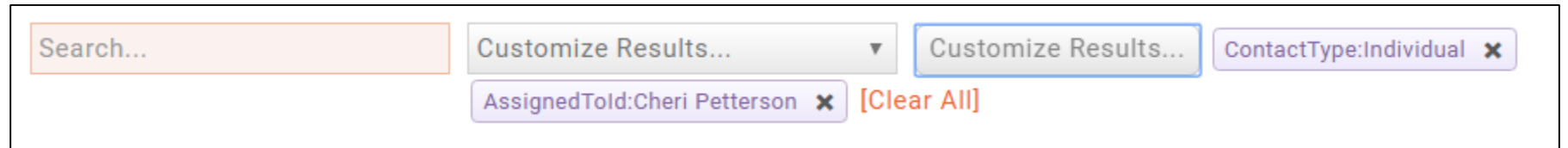
# Common Functions

Search Function – search functions are available throughout the software

- Type ahead search
- Show Only
- Customize Results



Search... Show only... Customize Results...  
Result Count: 105



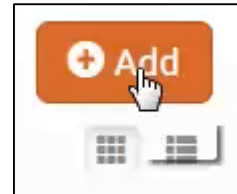
Search... Customize Results... Customize Results... ContactType:Individual ✕  
AssignedToId:Cheri Petterson ✕ [Clear All]

## Add

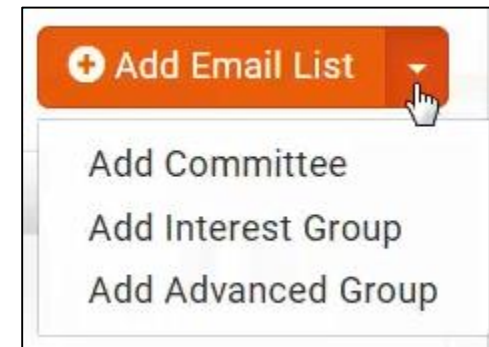
- the module that you are using will dictate the options available
- The most commonly used option will be displayed on the Add button



Contact



Membership




















List/Committee

## Changing displays from Tile to List and vice versa

Search... Show only... Customize Results...  
Result Count: 105

+ Add Organization



















 <a href="#">Cheri Petterson</a> Non-Member 218-546-5413	 <a href="#">Member Management Training</a> Non-Member	 <a href="#">Johnny Ocean</a> Non-Member 218-999-8722	 <a href="#">Brandon Zinda</a> Non-Member
 <a href="#">Susan Williams</a> Non-Member	 <a href="#">Andrea Anderson</a> Non-Member	 <a href="#">Michael Samuelson</a> Non-Member	 <a href="#">James Petterson</a> Non-Member 218-546-5413
 <a href="#">Greg Lamar</a> Non-Member	 <a href="#">Wilma Lamar</a> Non-Member	 <a href="#">Cuyuna Golf Club</a> Non-Member 2185647788	 <a href="#">Joe Wolner</a> Non-Member
 <a href="#">Mary Johnson</a> Non-Member	 <a href="#">Magnolis Steel</a> Non-Member	 <a href="#">Diane Meyer</a> Non-Member 1477 Bay Lake	 <a href="#">Crystal Nichols</a> Non-Member

# Common Functions

- Exporting List

Search... Show only... Customize Results... + Add Organization

Result Count: 105

 <b>Cheri Petterson</b> Non-Member 218-546-5413	 <b>Member Management Training</b> Non-Member	 <b>Johnny Ocean</b> Non-Member 218-999-8722	 <b>Brandon Zinda</b> Non-Member
 <b>Susan Williams</b> Non-Member	 <b>Andrea Anderson</b> Non-Member	 <b>Michael Samuelson</b> Non-Member	 <b>James Petterson</b> Non-Member 218-546-5413
 <b>Greg Lamar</b> Non-Member	 <b>Wilma Lamar</b> Non-Member	 <b>Cuyuna Golf Club</b> Non-Member 2185647788	 <b>Joe Wolner</b> Non-Member
 <b>Mary Johnson</b> Non-Member	 <b>Magnolis Steel</b> Non-Member	 <b>Diane Meyer</b> Non-Member 1477 Bay Lake	 <b>Crystal Nichols</b> Non-Member

# Common Functions

Edit 

Add 

Email 

Login to InfoHub (as user) 

Calendar 

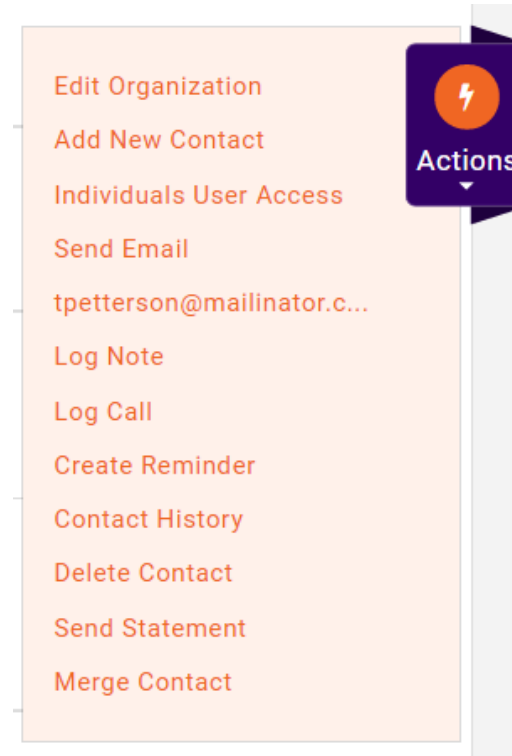
Communication Status 

*Note – some of the action buttons discussed above may be hidden until you dwell over them*

# Common Functions

Clicking the Actions icon on a page will display a list of the command tasks performed in the module

Tasks will vary per module

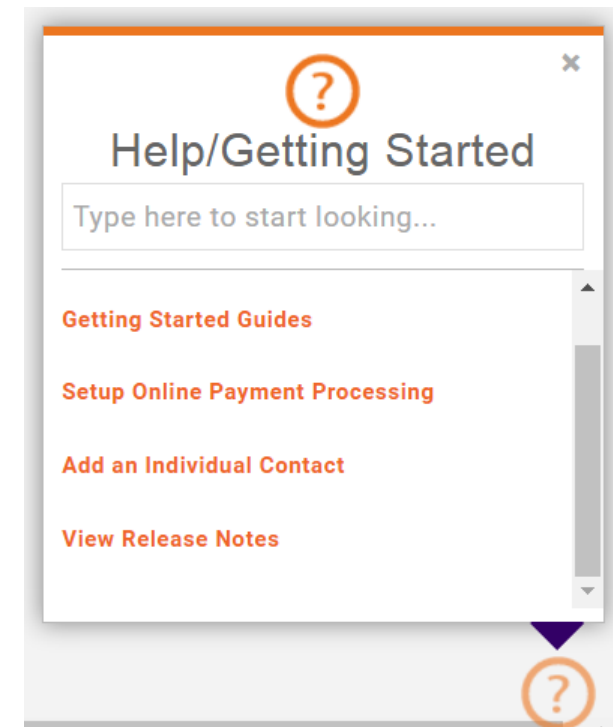




## Help



- A numbered link on the help button indicates that there are new software developments for your review



# GrowthZone Modules



# Grow Faster – Acquire New Members



Lists/Committees

Communications

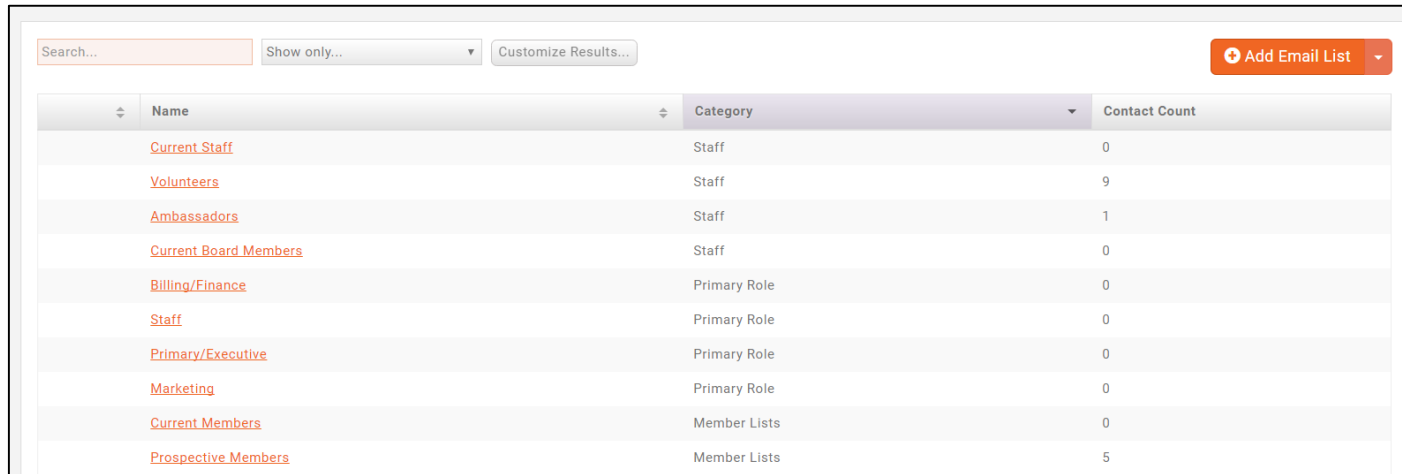
Contact Management

Membership Management

Chapters\*

Sales Funnel\*

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 shows a web interface for managing lists and committees. At the top, there is a search bar, a 'Show only...' dropdown, a 'Customize Results...' button, and an 'Add Email List' button. Below this is a table with columns for Name, Category, and Contact Count. The table lists various groups such as Current Staff, Volunteers, and Current Board Members, along with their respective categories and contact counts.

Name	Category	Contact Count
<a href="#">Current Staff</a>	Staff	0
<a href="#">Volunteers</a>	Staff	9
<a href="#">Ambassadors</a>	Staff	1
<a href="#">Current Board Members</a>	Staff	0
<a href="#">Billing/Finance</a>	Primary Role	0
<a href="#">Staff</a>	Primary Role	0
<a href="#">Primary/Executive</a>	Primary Role	0
<a href="#">Marketing</a>	Primary Role	0
<a href="#">Current Members</a>	Member Lists	0
<a href="#">Prospective Members</a>	Member Lists	5

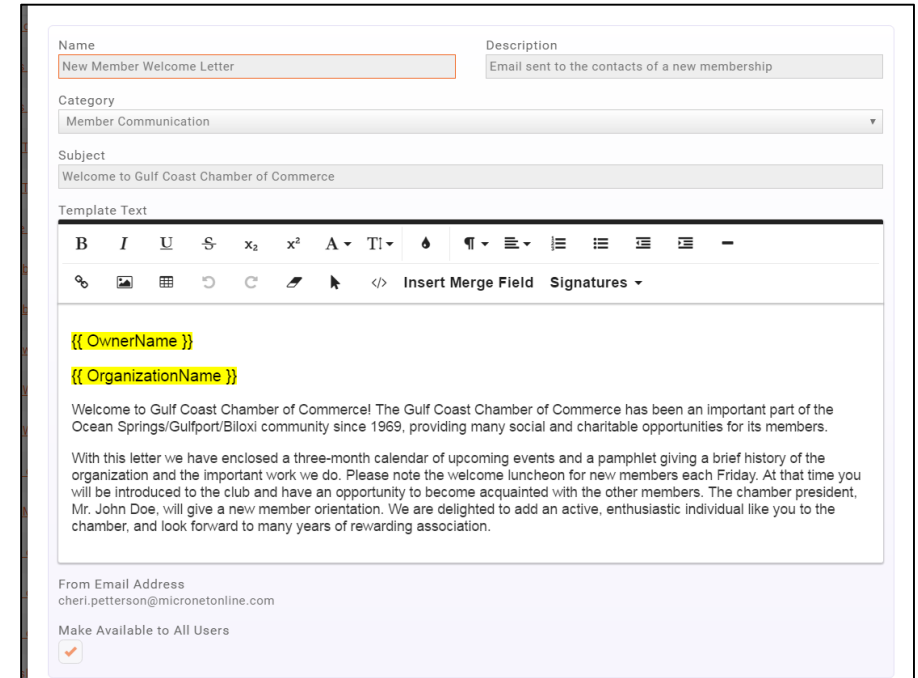
Templates

Categorization

Automated Messaging/Notifications

Individual/Group Emails

E-mail Receipt Tracking



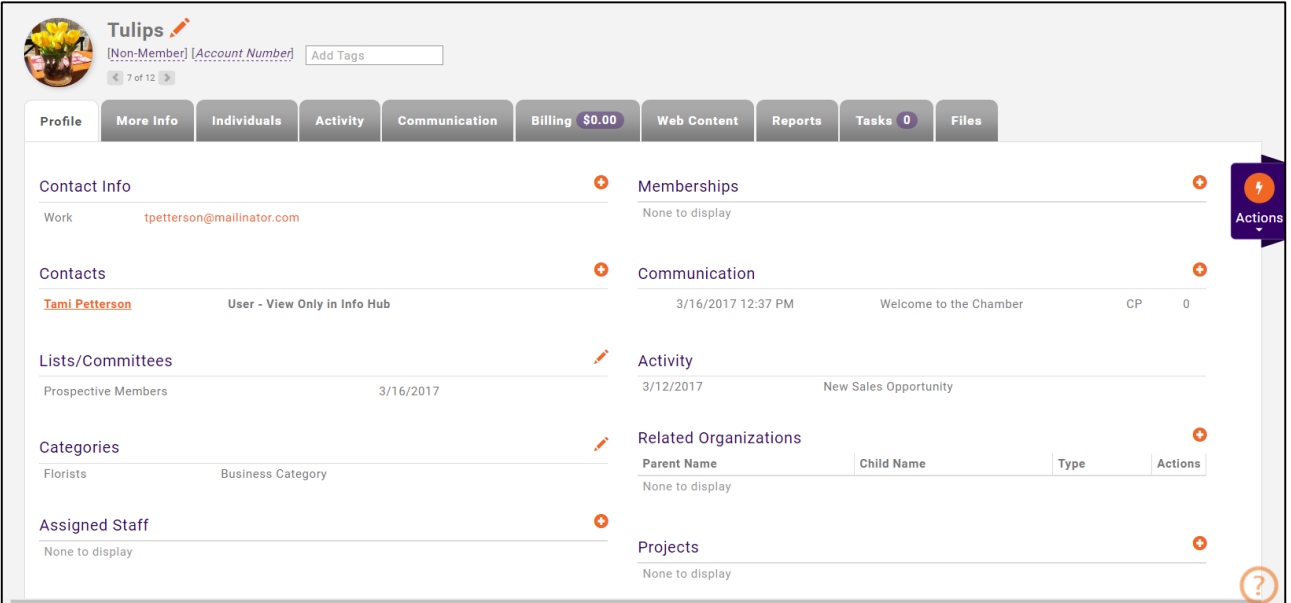
The screenshot shows the GrowthZone email template editor interface. It includes the following fields and options:

- Name:** New Member Welcome Letter
- Description:** Email sent to the contacts of a new membership
- Category:** Member Communication (dropdown menu)
- Subject:** Welcome to Gulf Coast Chamber of Commerce
- Template Text:** A rich text editor with a toolbar containing options for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), subscript (x<sub>2</sub>), superscript (x<sup>2</sup>), text color (A), background color (T), font size, text alignment, list creation, and indent. Below the toolbar, the text contains two merge fields: `{{ OwnerName }}` and `{{ OrganizationName }}`, both highlighted in yellow. The main text reads: "Welcome to Gulf Coast Chamber of Commerce! The Gulf Coast Chamber of Commerce has been an important part of the Ocean Springs/Gulfport/Biloxi community since 1969, providing many social and charitable opportunities for its members. With this letter we have enclosed a three-month calendar of upcoming events and a pamphlet giving a brief history of the organization and the important work we do. Please note the welcome luncheon for new members each Friday. At that time you will be introduced to the club and have an opportunity to become acquainted with the other members. The chamber president, Mr. John Doe, will give a new member orientation. We are delighted to add an active, enthusiastic individual like you to the chamber, and look forward to many years of rewarding association."
- From Email Address:** cherl.petterson@micronetonline.com
- Make Available to All Users:**

# 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 database



The screenshot displays the contact management interface for a contact named "Tulips". At the top, there is a profile picture of a vase of yellow tulips, the name "Tulips" with an edit icon, and status information: "[Non-Member] [Account Number] Add Tags" and "7 of 12". Below this is a navigation bar with tabs: Profile, More Info, Individuals, Activity, Communication, Billing (\$0.00), Web Content, Reports, Tasks (0), and Files. The main content area is divided into two columns of expandable sections, each with a plus icon in the top right corner:

- Contact Info:** Work email: tpetterson@mailinator.com
- Memberships:** None to display
- Contacts:** Tami Petterson, User - View Only in Info Hub
- Communication:** 3/16/2017 12:37 PM, Welcome to the Chamber, CP, 0
- Lists/Committees:** Prospective Members, 3/16/2017
- Activity:** 3/12/2017, New Sales Opportunity
- Categories:** Florists, Business Category
- Related Organizations:** Parent Name, Child Name, Type, Actions; None to display
- Assigned Staff:** None to display
- Projects:** None to display

On the right side, there is a vertical "Actions" menu with a lightning bolt icon and a question mark icon at the bottom right of the interface.

## 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

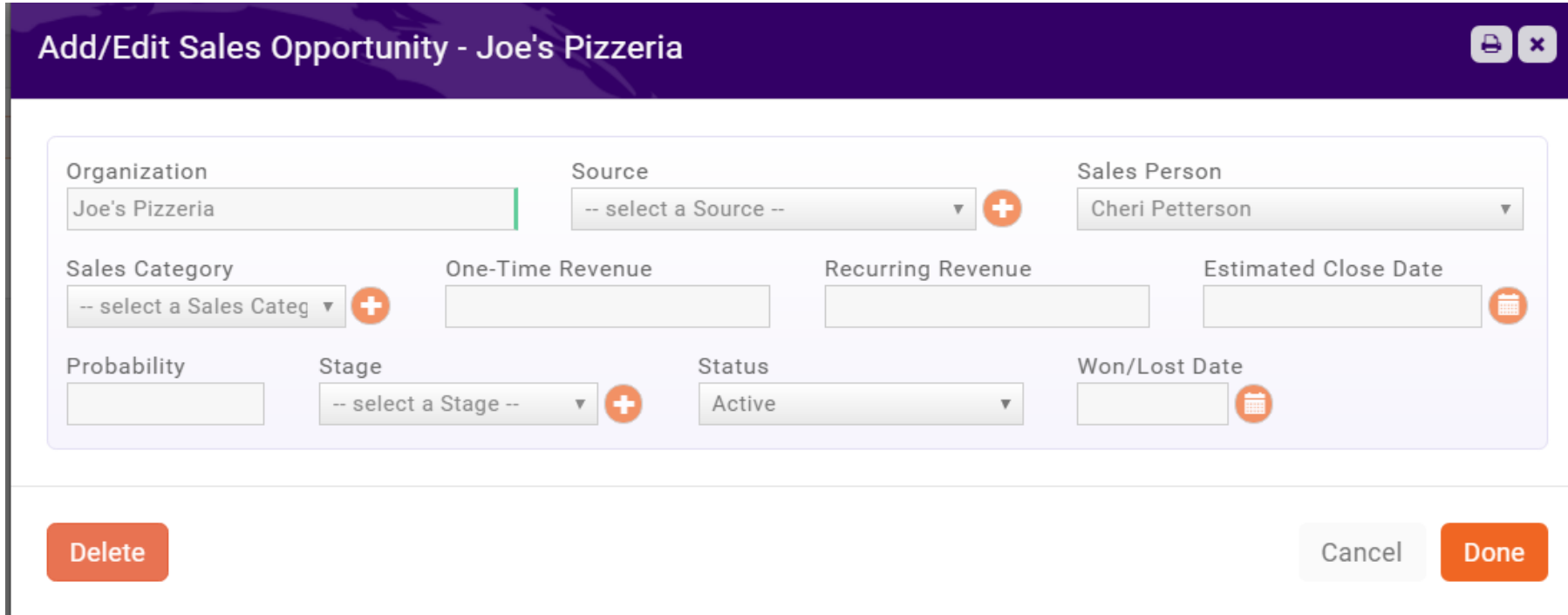
Enter Contact Information

**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/Edit Sales Opportunity - Joe's Pizzeria**

Organization: Joe's Pizzeria

Source: -- select a Source --

Sales Person: Cheri Petterson

Sales Category: -- select a Sales Categ --

One-Time Revenue:

Recurring Revenue:

Estimated Close Date:

Probability:

Stage: -- select a Stage --

Status: Active

Won/Lost Date:

Buttons: Delete, Cancel, Done



# Sales Funnel\*

Allows for tracking:

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

Sales Opportunity Communication Report Run Report

Sales Persons: 
 Sales Statuses: 
 Sales Stages:

Sales Source: 
 Sales Categories:

Criteria / Filters +

**Display Options**

Fields to Display: 
 Summarize By:  x
 Display Mode:

Add Summarize By

**Results**

Sales Person	Prospect Name	Days since contact
Cheri Petterson	Joe's Pizzeria	0
Cheri Petterson	The Ski Hill	0
<b>Count\Average\Totals</b>	<b>2</b>	<b>0</b>

**Results**

Contact Name	Default Email	Default Phone	Sales Person	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Timeline	Timeline Date
Joe's Pizzeria	jranard@mailinator.com		Cheri Petterson	3/31/2017	\$50.00	\$1,200.00	\$1,250.00	Prospect		Initial Contact	3/17/2017	
The Ski Hill			Cheri Petterson	3/29/2017	\$50.00	\$2,000.00	\$2,050.00	Active		Initial Contact		
<b>Count\Average\Totals</b>	<b>2</b>				<b>\$100.00</b>	<b>\$3,200.00</b>	<b>\$3,300.00</b>					

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

Chapters	
Chapter Name	Parent Chapter
<a href="#">MN Veterinary Association Chapter</a>	Cheri's Sandboxes
<a href="#">ND Vet Association</a>	Cheri's Sandboxes
<a href="#">SD Veterinary Association</a>	Cheri's Sandboxes

# Retain & Engage Your Members

Events Management

Info Hub

Events Expo\*

Sponsors/Ads\*

Web Content\*

Fundraising\*

On-line Store\*

Certification\*

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

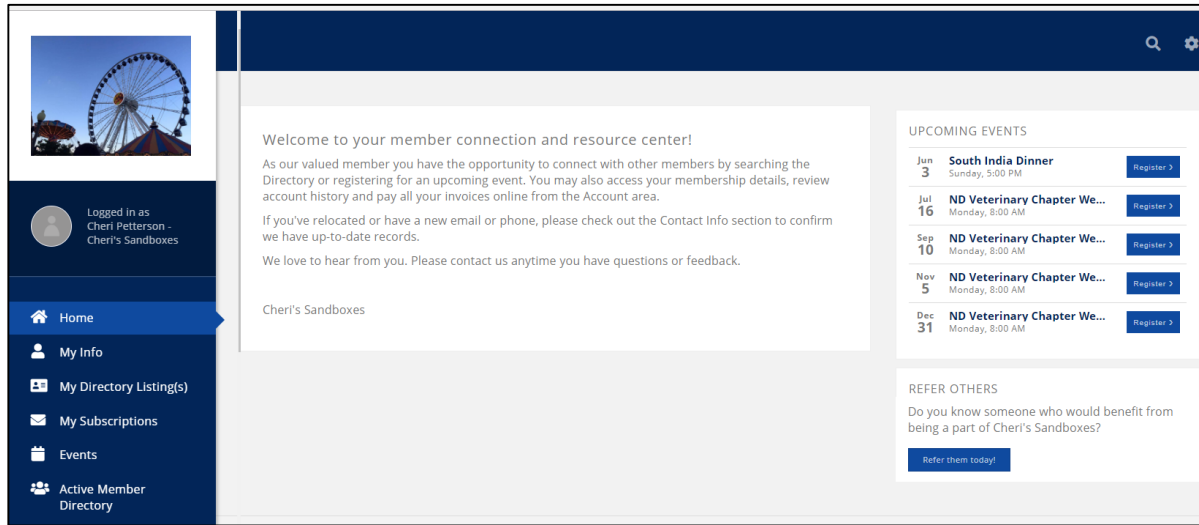


### Additional Information

Event Contact:  
Cheri Petterson  
218-546-5413

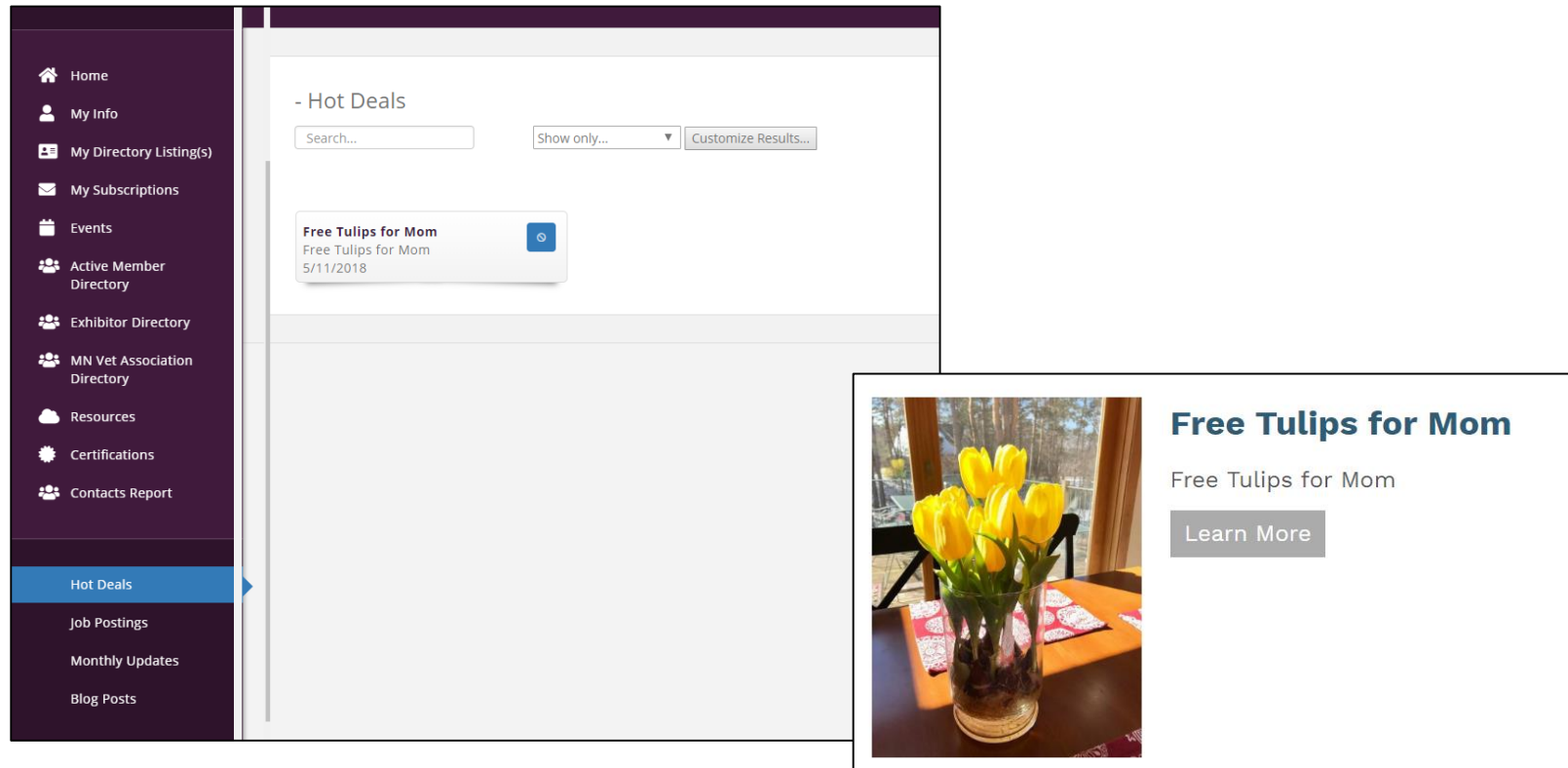
Powered By MemberZone

- 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 the member portal interface. On the left is a dark blue navigation sidebar with a home icon, a user profile picture, and menu items: Home, My Info, My Directory Listing(s), My Subscriptions, Events, and Active Member Directory. The main content area has a dark blue header with search and settings icons. Below the header, a welcome message reads: "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." Below this is the user's name, "Cheri's Sandboxes". To the right, an "UPCOMING EVENTS" section lists: Jun 3 South India Dinner (Sunday, 5:00 PM), Jul 16 ND Veterinary Chapter We... (Monday, 8:00 AM), Sep 10 ND Veterinary Chapter We... (Monday, 8:00 AM), Nov 5 ND Veterinary Chapter We... (Monday, 8:00 AM), and Dec 31 ND Veterinary Chapter We... (Monday, 8:00 AM). Each event has a "Register >" button. Below the events is a "REFER OTHERS" section with the text "Do you know someone who would benefit from being a part of Cheri's Sandboxes?" and a "Refer them today!" button.

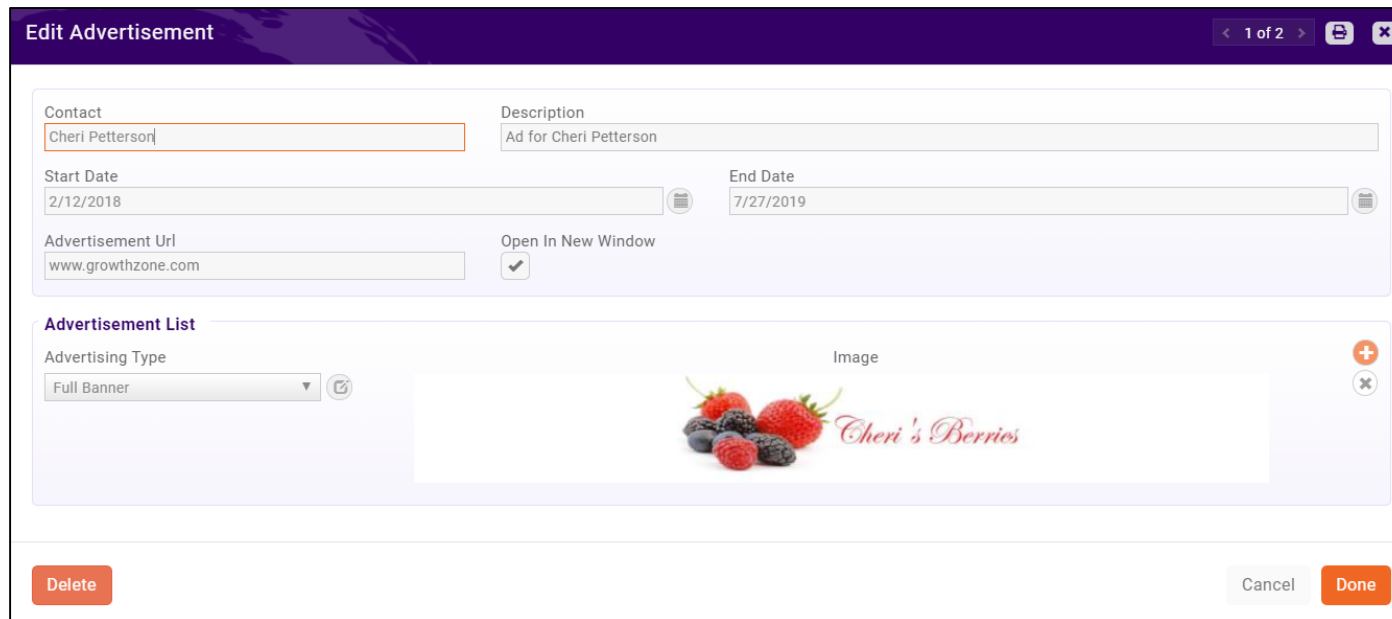
Provide additional benefits to members using hot deals, job postings and member to member hot deals



The screenshot displays a web application interface with a dark purple sidebar on the left containing navigation links: Home, My Info, My Directory Listing(s), My Subscriptions, Events, Active Member Directory, Exhibitor Directory, MN Vet Association Directory, Resources, Certifications, and Contacts Report. The 'Hot Deals' link is highlighted in blue. The main content area is titled '- Hot Deals' and includes a search bar, a 'Show only...' dropdown menu, and a 'Customize Results...' button. A featured deal titled 'Free Tulips for Mom' is displayed with a date of 5/11/2018. An inset image shows a close-up of the deal, featuring a photograph of yellow tulips in a glass vase and a 'Learn More' button.

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



The screenshot shows the 'Edit Advertisement' interface. At the top, there is a title bar with 'Edit Advertisement' and navigation icons. The form is divided into several sections:

- Contact:** A text field containing 'Cheri Petterson'.
- Description:** A text field containing 'Ad for Cheri Petterson'.
- Start Date:** A date picker set to '2/12/2018'.
- End Date:** A date picker set to '7/27/2019'.
- Advertisement Url:** A text field containing 'www.growthzone.com'.
- Open In New Window:** A checked checkbox.
- Advertising Type:** A dropdown menu set to 'Full Banner'.
- Image:** A preview area showing a banner with a photo of raspberries and the text 'Cheri's Berries' in a cursive font.

At the bottom of the form, there are three buttons: 'Delete', 'Cancel', and 'Done'.

## Help the community with fundraising campaigns and track donations

### Special Olympics

Summary
Donation Activity
Recurring
Donors
Donation Setup

#### General Information

Campaign Name	Special Olympics
Campaign Status	Active
Start Date	3/6/2017
End Date	
Description	Support Special Olympics
Primary Contact	Brandon Zinda

#### Donation Statistics

Number of Donations	2
Goal Amount	
Current Amount Paid	
Remaining to Goal	

### Special Olympics

Summary
Donation Activity
Recurring
Donors
Donation Setup

Customize Results...
Customize Results...
Amount: between 100 and 500 ✕
[Clear All]

Contact	Description	Total	Paid	Type	Purchase Date	Actions
Nora Breiby	Special Olympics	\$100.00	\$0.00	One Time Donation	6/2/2017	
Bikes Bikes Bikes	Special Olympics	\$100.00	\$0.00	One Time Donation	6/1/2017	
Matt Anakkala	Special Olympics	\$100.00	\$0.00	One Time Donation	5/11/2017	
Henry James	Special Olympics	\$100.00	\$0.00	One Time Donation	5/8/2017	
Cherle Swanson	Special Olympics	\$100.00	\$0.00	One Time Donation	4/27/2017	
Cheri Petterson	Special Olympics	\$100.00	\$0.00	One Time Donation	4/18/2017	
Jerry Mannard	Special Olympics	\$100.00	\$100.00	One Time Donation	4/7/2017	
Daphne Duck	Special Olympics	\$100.00	\$0.00	One Time Donation	4/7/2017	
Joan Jett	Special Olympics	\$100.00	\$0.00	One Time Donation	3/26/2017	
Cheri Petterson	Special Olympics	\$500.00	\$500.00	One Time Donation	3/17/2017	






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

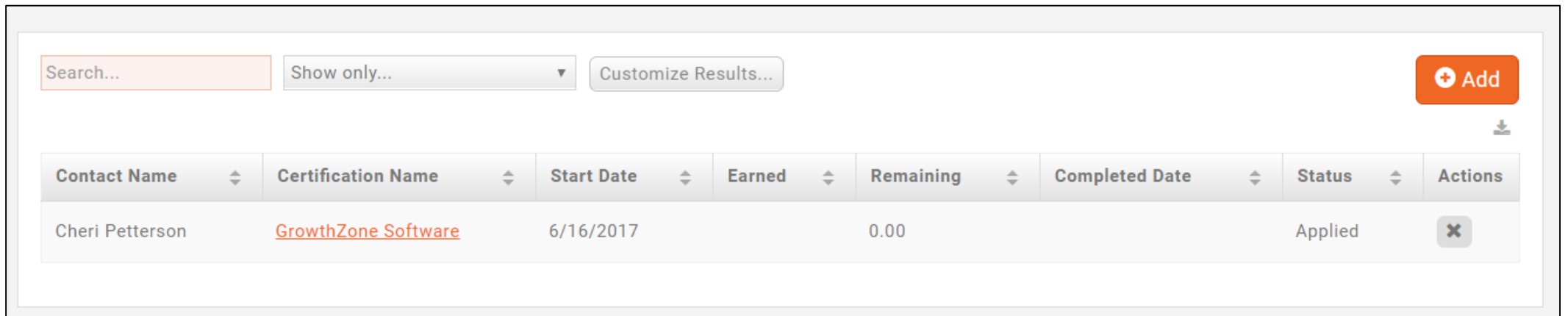
## CHERI'S SANDBOX STORE

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


 <p>LOGO T-SHIRT</p> <p><b>\$ 40.00</b></p> <p><a href="#">Details</a></p> <p><a href="#">Add To Cart</a></p>	 <p>LOGO BACKPACK</p> <p><b>\$ 50.00</b></p> <p><a href="#">Details</a></p> <p><a href="#">Add To Cart</a></p>	 <p>LOGO BASEBALL CAPS</p> <p><b>\$ 25.00</b></p> <p><a href="#">Details</a></p> <p><a href="#">Add To Cart</a></p>
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The Certification module allows you to track certifications for your members

- Track hours
- Track Requirements
- Provide Certificates



The screenshot shows a web interface for the Certification module. At the top, there is a search bar with the text "Search...", a dropdown menu labeled "Show only..." with a downward arrow, and a button labeled "Customize Results...". On the right side, there is an orange button with a white plus sign and the text "Add", and a small download icon below it. Below these elements is a table with the following columns: "Contact Name", "Certification Name", "Start Date", "Earned", "Remaining", "Completed Date", "Status", and "Actions". Each column header has a small downward arrow. The table contains one row of data: "Cheri Petterson" in the Contact Name column, "GrowthZone Software" in the Certification Name column, "6/16/2017" in the Start Date column, "0.00" in the Remaining column, and "Applied" in the Status column. The Actions column contains a small grey button with a white "X" icon.

Contact Name	Certification Name	Start Date	Earned	Remaining	Completed Date	Status	Actions
Cheri Petterson	<a href="#">GrowthZone Software</a>	6/16/2017		0.00		Applied	

# Do More with Less Time

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Billing

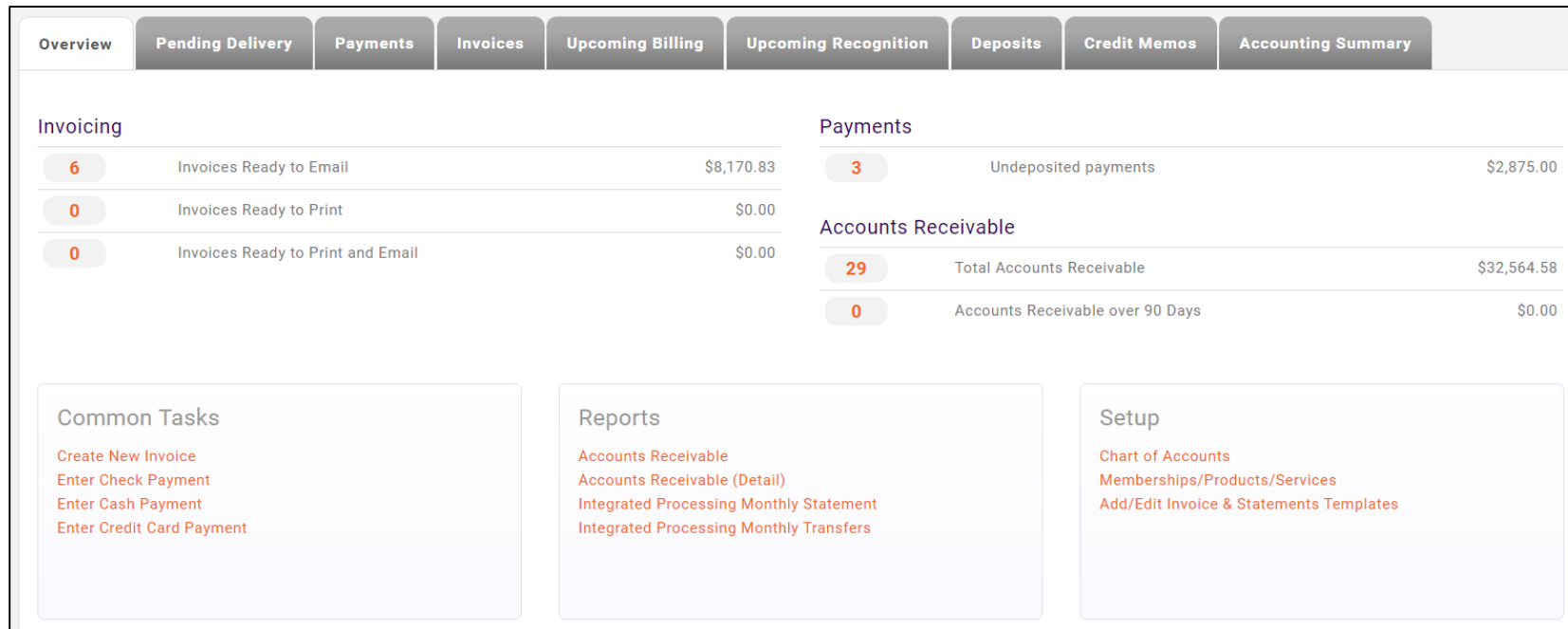
Reporting

Forms\*

Project Management\*

Marketing Automation\*

- Easy creating of invoices
- Accepting Payments
- GrowthZone Pay



The screenshot displays the GrowthZone Billing dashboard. At the top, there is a navigation bar with tabs: Overview, Pending Delivery, Payments, Invoices, Upcoming Billing, Upcoming Recognition, Deposits, Credit Memos, and Accounting Summary. The main content area is divided into three sections: Invoicing, Payments, and Accounts Receivable. Below these are three boxes for Common Tasks, Reports, and Setup.

Invoicing		
6	Invoices Ready to Email	\$8,170.83
0	Invoices Ready to Print	\$0.00
0	Invoices Ready to Print and Email	\$0.00

Payments		
3	Undeposited payments	\$2,875.00

Accounts Receivable		
29	Total Accounts Receivable	\$32,564.58
0	Accounts Receivable over 90 Days	\$0.00

#### Common Tasks

- Create New Invoice
- Enter Check Payment
- Enter Cash Payment
- Enter Credit Card Payment

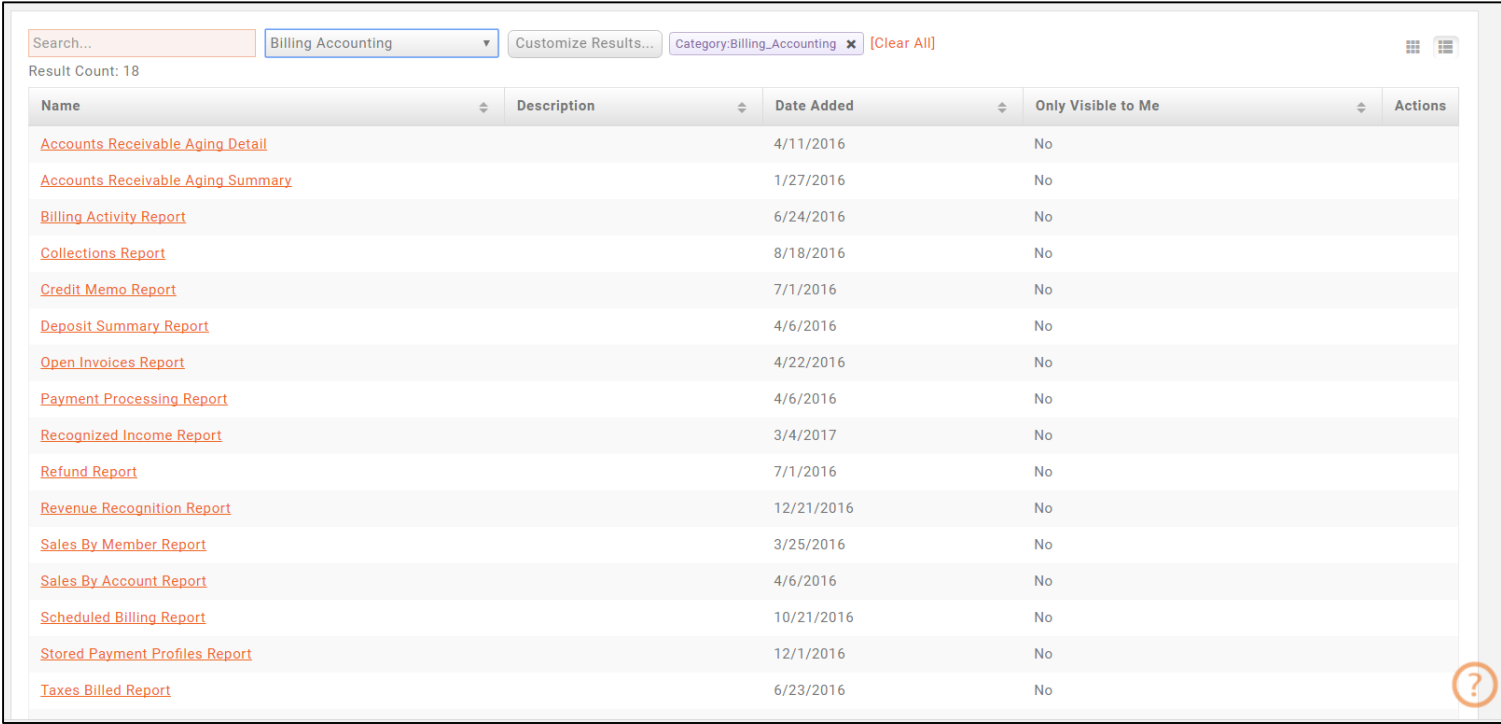
#### Reports

- Accounts Receivable
- Accounts Receivable (Detail)
- Integrated Processing Monthly Statement
- Integrated Processing Monthly Transfers

#### Setup

- Chart of Accounts
- Memberships/Products/Services
- Add/Edit Invoice & Statements Templates

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

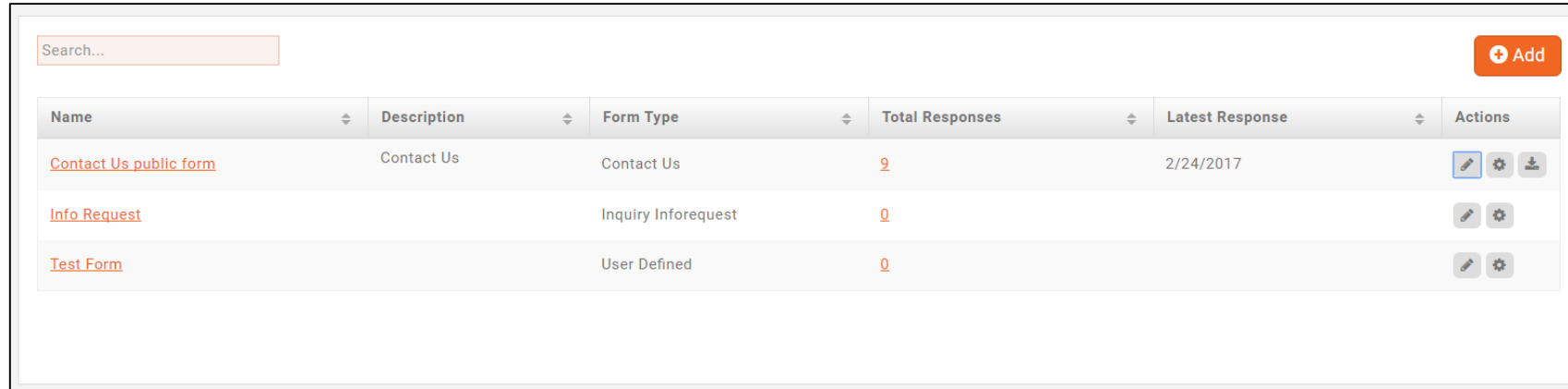


Search... Billing Accounting Customize Results... Category: Billing\_Accounting x [Clear All]








Result Count: 18

Name	Description	Date Added	Only Visible to Me	Actions
<a href="#">Accounts Receivable Aging Detail</a>		4/11/2016	No	
<a href="#">Accounts Receivable Aging Summary</a>		1/27/2016	No	
<a href="#">Billing Activity Report</a>		6/24/2016	No	
<a href="#">Collections Report</a>		8/18/2016	No	
<a href="#">Credit Memo Report</a>		7/1/2016	No	
<a href="#">Deposit Summary Report</a>		4/6/2016	No	
<a href="#">Open Invoices Report</a>		4/22/2016	No	
<a href="#">Payment Processing Report</a>		4/6/2016	No	
<a href="#">Recognized Income Report</a>		3/4/2017	No	
<a href="#">Refund Report</a>		7/1/2016	No	
<a href="#">Revenue Recognition Report</a>		12/21/2016	No	
<a href="#">Sales By Member Report</a>		3/25/2016	No	
<a href="#">Sales By Account Report</a>		4/6/2016	No	
<a href="#">Scheduled Billing Report</a>		10/21/2016	No	
<a href="#">Stored Payment Profiles Report</a>		12/1/2016	No	
<a href="#">Taxes Billed Report</a>		6/23/2016	No	

Use the Form Builder/Survey tool to create online forms or insert links into emails to encourage and track responses



The screenshot shows a web interface for managing forms. At the top left is a search bar labeled "Search...". At the top right is an orange "Add" button with a plus icon. Below these is a table with the following columns: Name, Description, Form Type, Total Responses, Latest Response, and Actions. The table contains three rows of form data.

Name	Description	Form Type	Total Responses	Latest Response	Actions
<a href="#">Contact Us public form</a>	Contact Us	Contact Us	9	2/24/2017	  
<a href="#">Info Request</a>		Inquiry Inforequest	0		 
<a href="#">Test Form</a>		User Defined	0		 

# Project Management\*

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

**New Member On-boarding** Add Tags

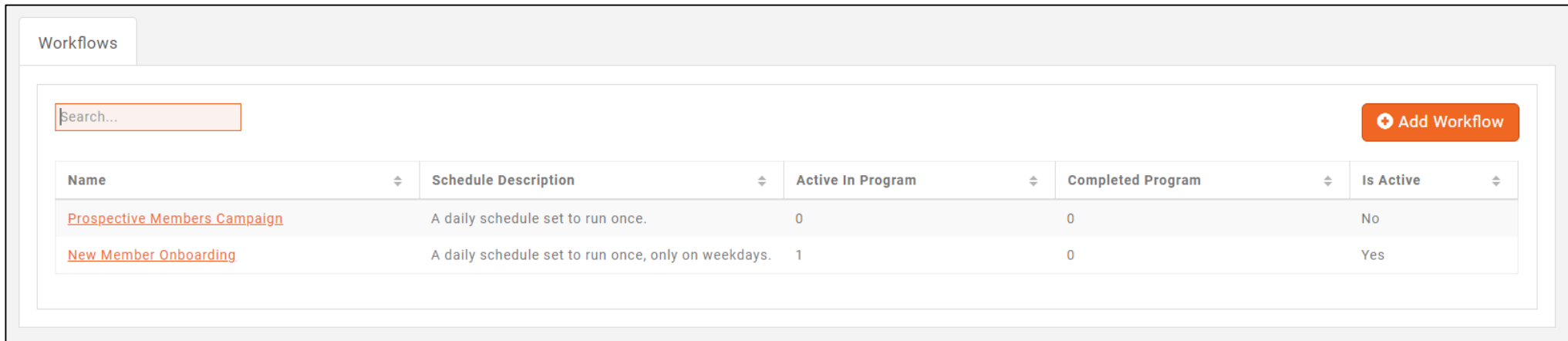
Summary Data Economic Development **Tasks** Files Communication

+ Add ⚡ Actions

Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
<a href="#">Welcome Letter</a>	Important	Members On-boarding		Brandon Zinda			0
<a href="#">Ambassador Visit</a>	Important	Members On-boarding		Sheryl Rassler			0
<a href="#">Welcome Email</a>	Important	Members On-boarding		Brandon Zinda			0

# 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 work flow for new prospects, or perhaps a drip campaign for new members. A workflow can be tied to a campaign list, that will then allow you to automatically send targeted information to key individuals and groups.



The screenshot shows the 'Workflows' management interface. It features a search bar at the top left, an 'Add Workflow' button at the top right, and a table listing existing workflows. The table has five columns: Name, Schedule Description, Active In Program, Completed Program, and Is Active. Two workflows are listed: 'Prospective Members Campaign' and 'New Member Onboarding'.

Name	Schedule Description	Active In Program	Completed Program	Is Active
<a href="#">Prospective Members Campaign</a>	A daily schedule set to run once.	0	0	No
<a href="#">New Member Onboarding</a>	A daily schedule set to run once, only on weekdays.	1	0	Yes



Questions?

