

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

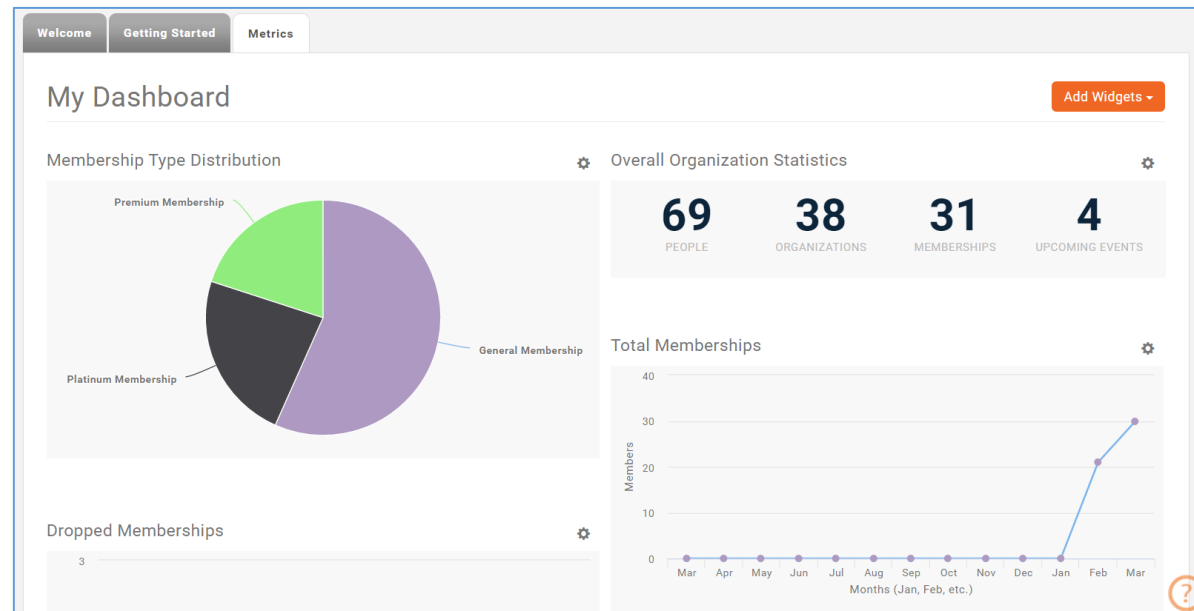
Easy to use, and designed to manage all the day-to-day operations of your organization

Three Different Views

- Staff/Database View
- Member View
- Public View

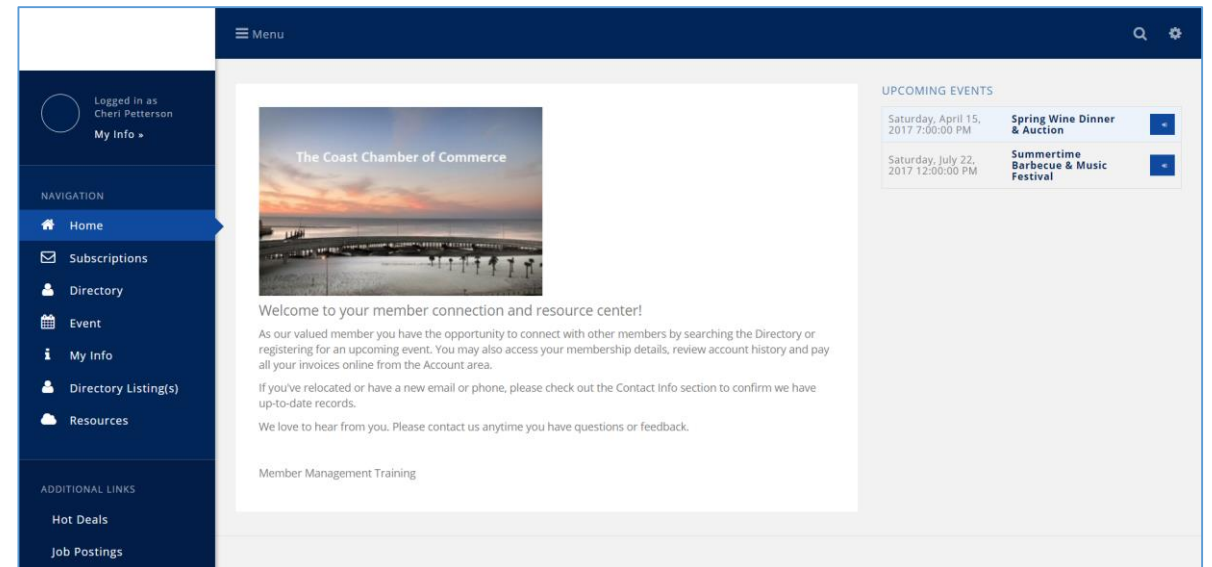
Overview – Staff View - Database

- 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



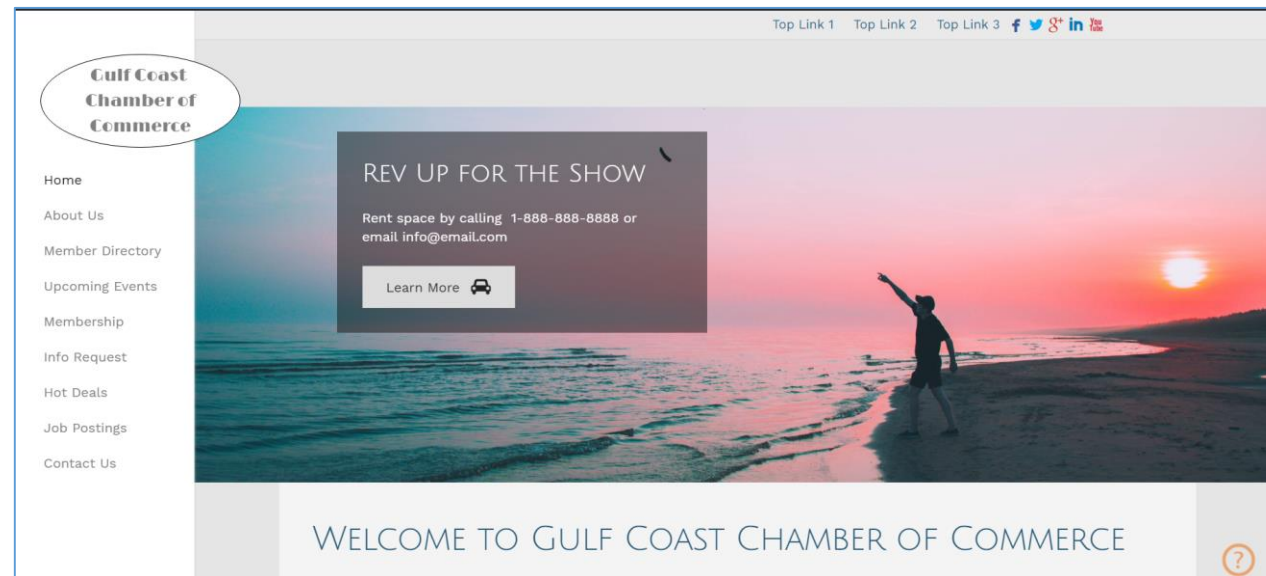
Overview – Member View - InfoHub

- 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...



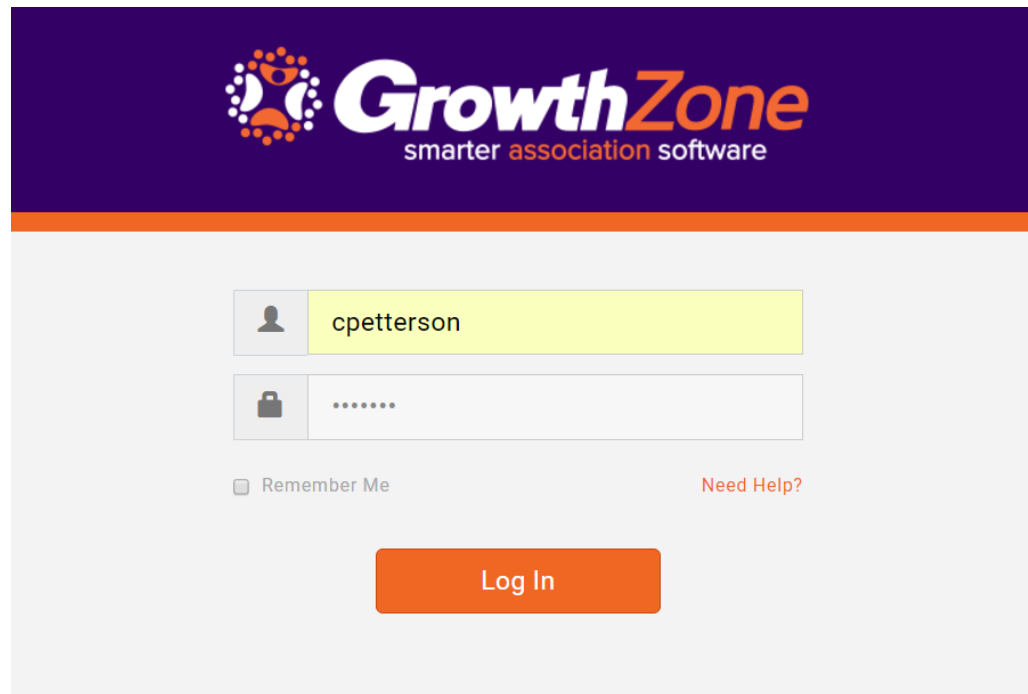
Overview – Website – Public View

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



Staff View - Database

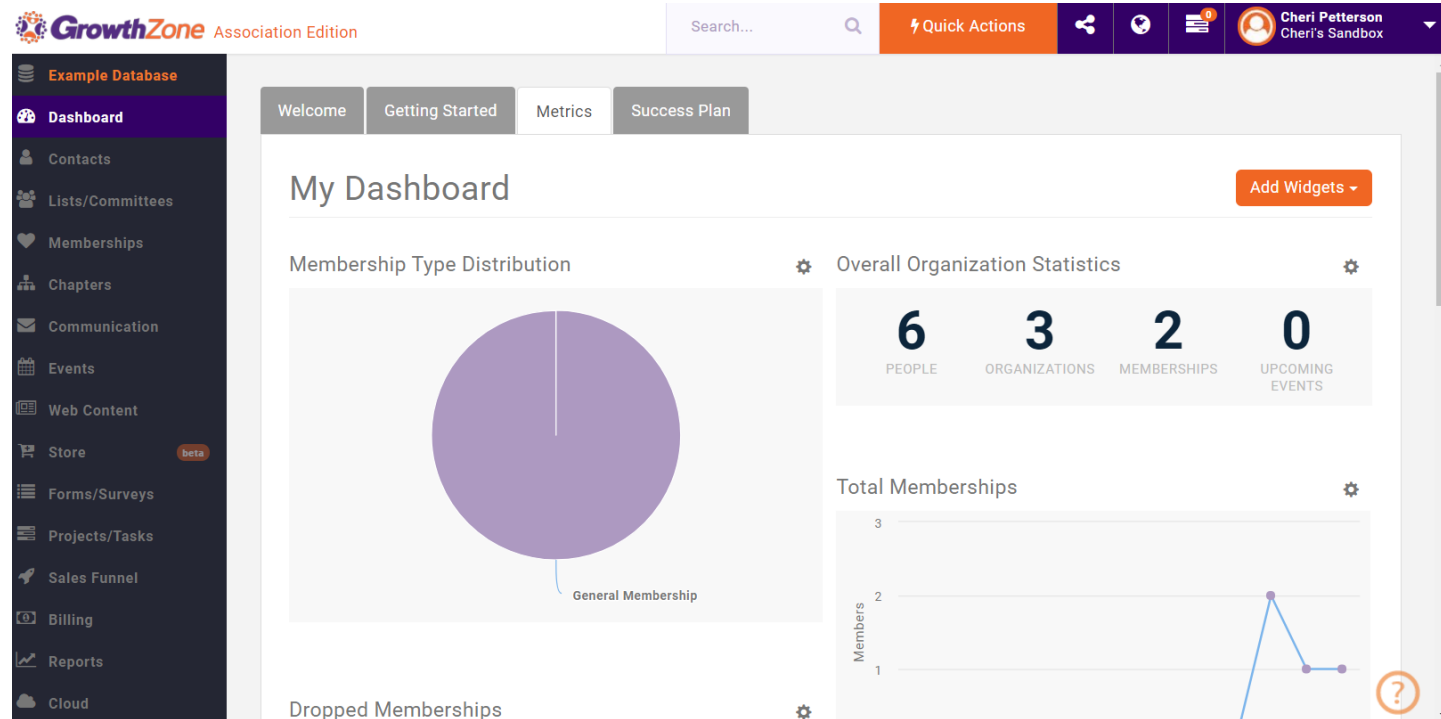
- Logging In: <https://growthzoneapp.com/login>



The image shows a login form for GrowthZone. At the top, there is a purple header with the GrowthZone logo and the text "GrowthZone smarter association software". Below the header is a white login form. The form has two input fields: the first is for the username, containing "cpetterson", and the second is for the password, containing six dots. 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



Software Navigation - Header

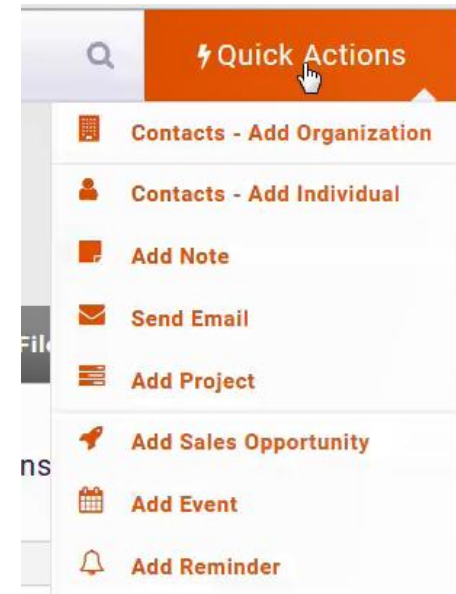
Search

- 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  

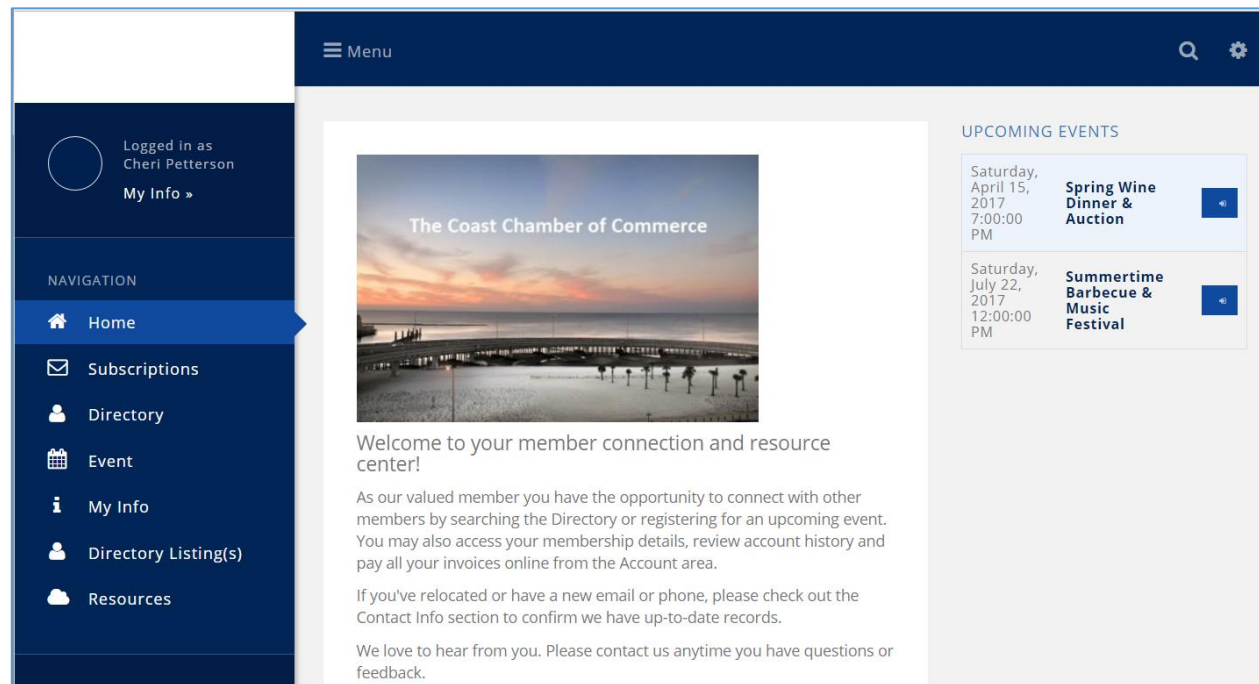
Address City State Province Postal Code Country Type  

Individuals (Optional)

First Name Last Name Title  

Software Navigation – Access to InfoHub

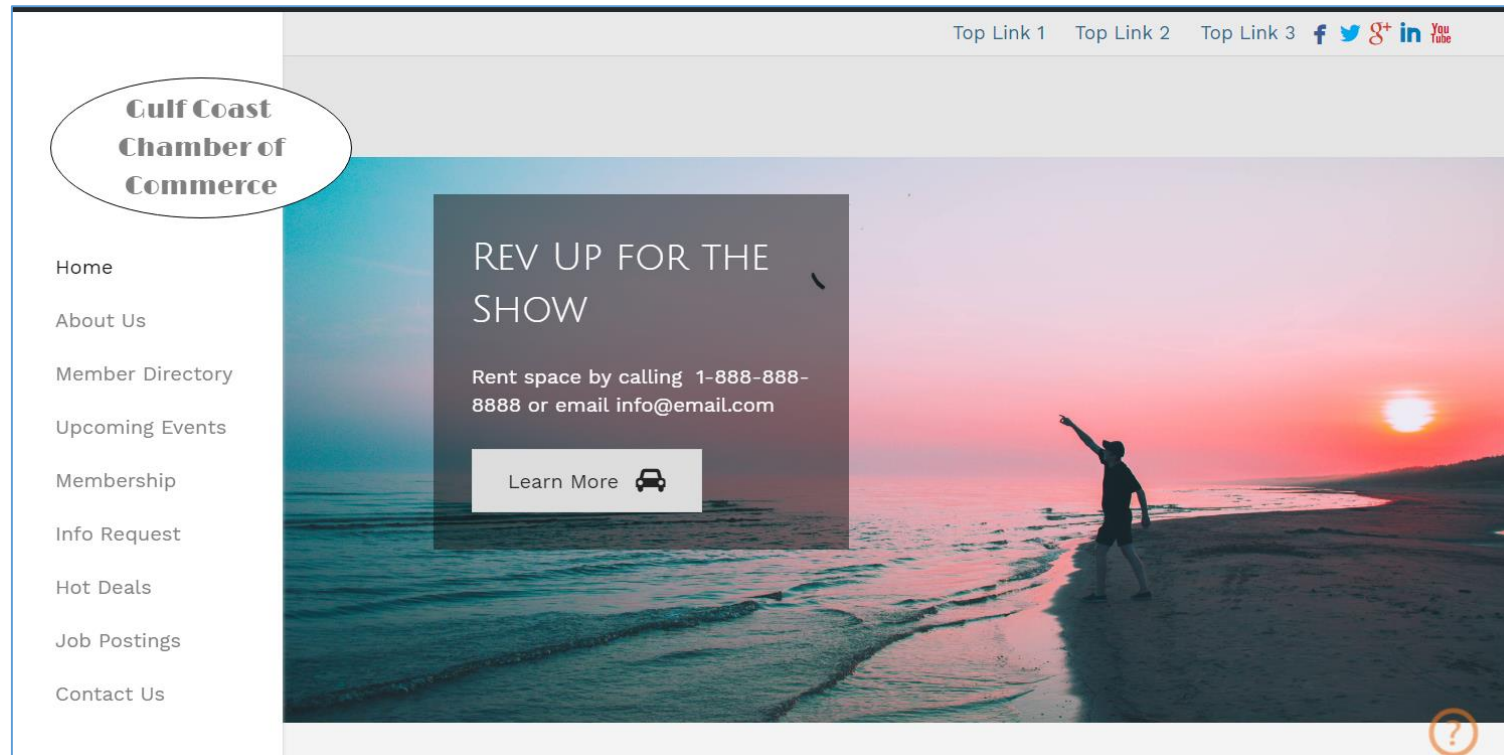
- The logged on user can access the Info Hub by clicking



The screenshot displays the GrowthZone software interface. At the top, there is a dark blue header with a 'Menu' icon, a search icon, and a settings icon. On the left side, there is a dark blue navigation sidebar. The top of the sidebar shows the user is logged in as 'Cheri Petterson' with a 'My Info »' link. Below this, the 'NAVIGATION' section lists several options: 'Home' (highlighted with a blue arrow), 'Subscriptions', 'Directory', 'Event', 'My Info', 'Directory Listing(s)', and 'Resources'. The main content area features a large image of a coastal scene with the text 'The Coast Chamber of Commerce'. Below the image, there is a welcome message: 'Welcome to your member connection and resource center!'. This is followed by a paragraph: '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.' Another paragraph follows: '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.' The final paragraph reads: 'We love to hear from you. Please contact us anytime you have questions or feedback.' On the right side of the main content area, there is a section titled 'UPCOMING EVENTS' which lists two events: '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 has a blue arrow icon to its right.

Software Navigation – Access to your Web-site

- You can a view your website by clicking



Software Navigation – Assigned Tasks

- Go to your list of Assigned tasks

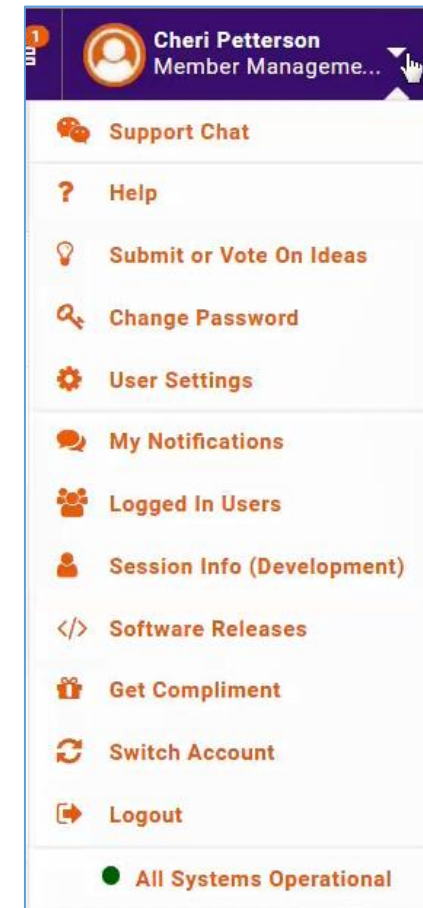


Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
		Follow-up Reminder for Cheri Petterson	Normal		Adrian Chavez	Cheri Petterson	3/16/2017		0
		Follow-up Reminder for Cheri Petterson	Normal	Member Acquisition	Adrian Chavez	Cheri Petterson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

Software Navigation – Additional Options

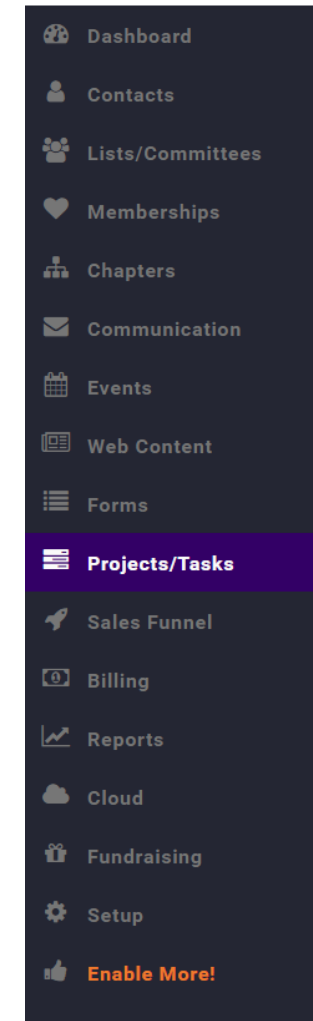
Additional options for the logged in staff member

- 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



Work Space

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

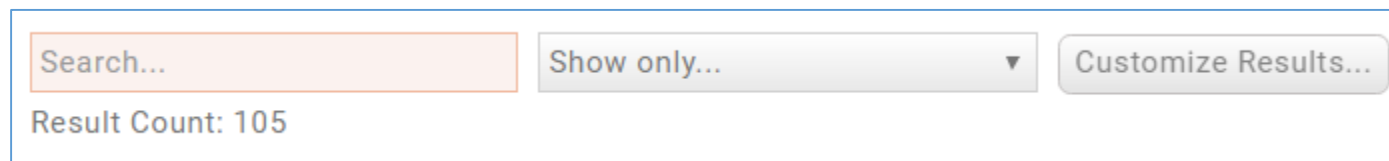
Search... Individuals Customize Results... ContactType:Individual x [Clear All] + Add Organization

Result Count: 69

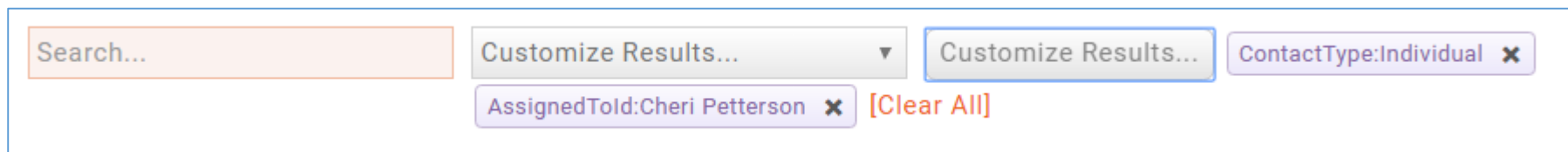
Type	Name	Balance	Primary Connection	Status	Primary Email	Primary Phone	City	State Province
	Cheri Petterson	\$337.00	Member Management Training	Non Member	cheri.petterson@micronetonline.com	218-546-5413		
	Johnny Ocean	\$0.00		Non Member		218-999-8722		
	Brandon Zinda	\$0.00	Member Management Training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



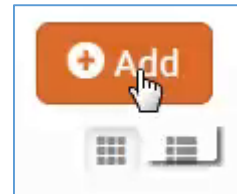
Search... Customize Results... Customize Results... ContactType:Individual ✕
AssignedTold:Cheri Petterson ✕ [Clear All]

Common Functions

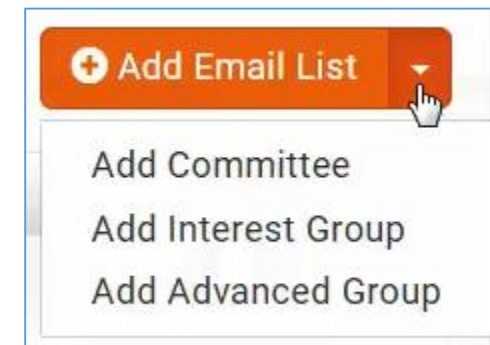
- Add
 - the module that you are using will dictate the options available
 - The most commonly used option will be displayed on the Add button



Contact



Membership



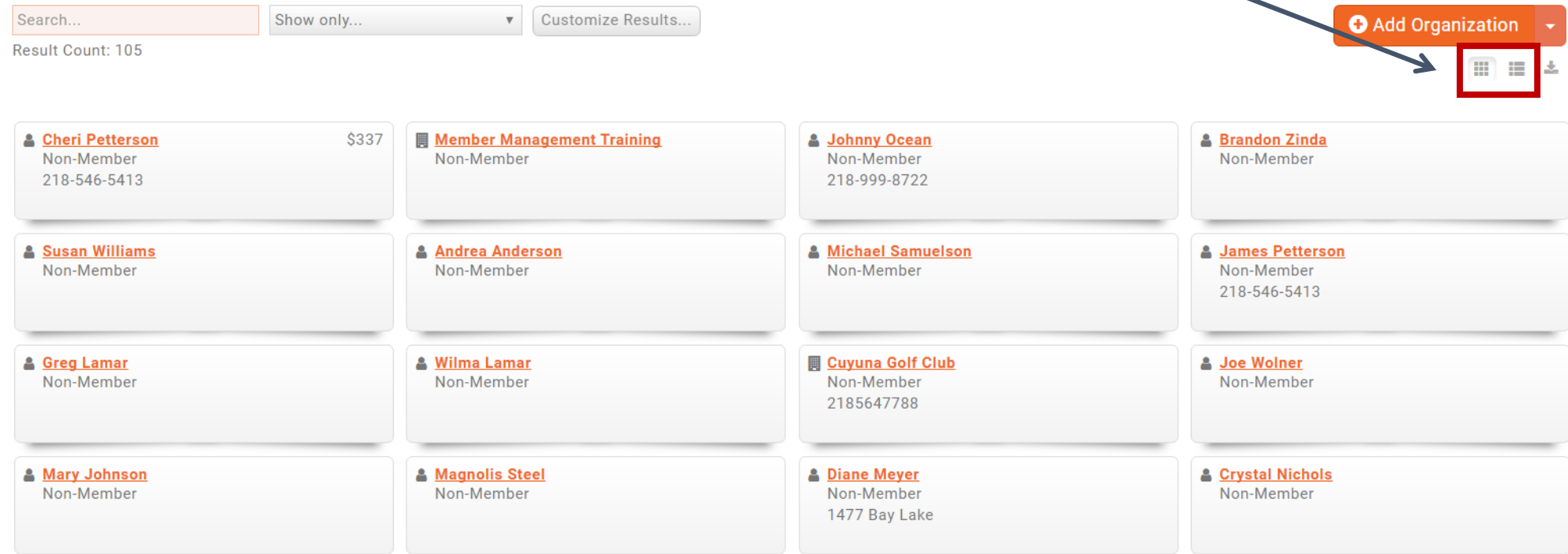
List/Committee

















Common Functions

- Changing displays from Tile to List and vice versa

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

+ Add Organization



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

Common Functions

- Exporting List






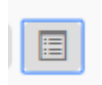
Search... Show only... Customize Results... + Add Organization

Result Count: 105

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

[Grid View] [List View] [Download]

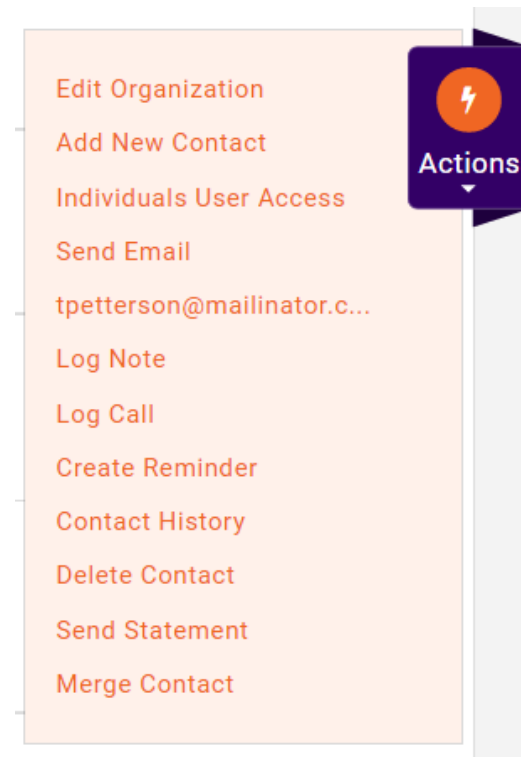
Common Functions

- 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

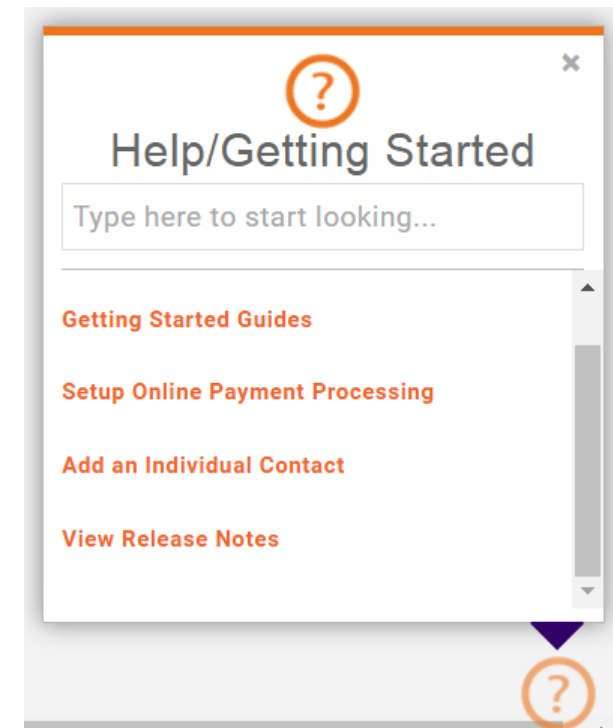
Common Functions

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



Common Functions

- Help 
 - Still under development, clicking this icon will provide help information and simulations



GrowthZone Modules

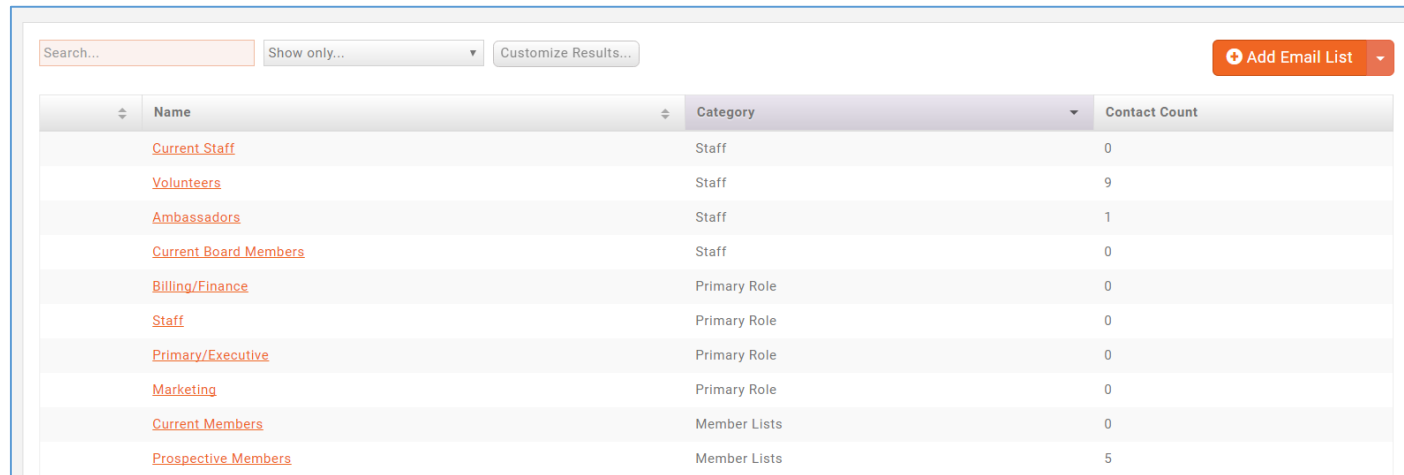
The GrowthZone Membership Management System is powerful, easy to use and designed to manage all the day-to-day operations of your organization.

Grow Faster – Acquire New Members

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

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 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 the following columns: Name, Category, and Contact Count.

Name	Category	Contact Count
Current Staff	Staff	0
Volunteers	Staff	9
Ambassadors	Staff	1
Current Board Members	Staff	0
Billing/Finance	Primary Role	0
Staff	Primary Role	0
Primary/Executive	Primary Role	0
Marketing	Primary Role	0
Current Members	Member Lists	0
Prospective Members	Member Lists	5

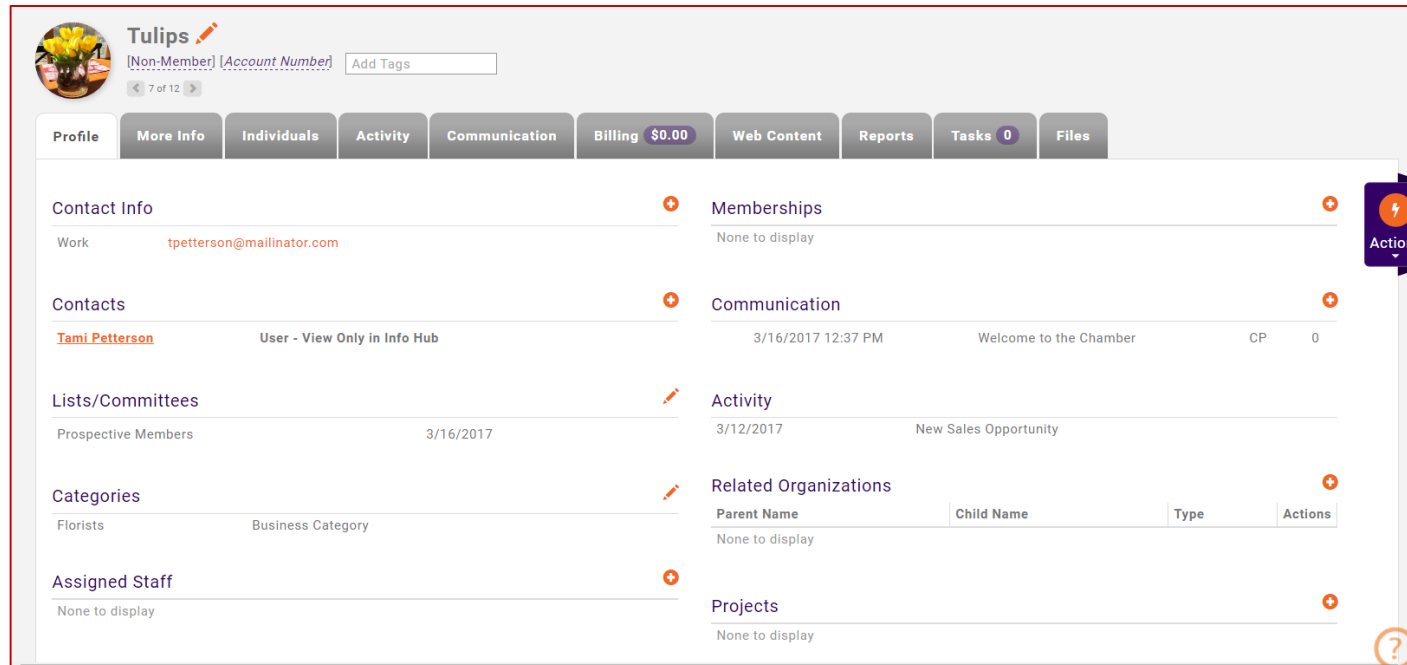
Communications

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

Name	Description
<input type="text" value="New Member Welcome Letter"/>	<input type="text" value="Email sent to the contacts of a new membership"/>
Category	
<input type="text" value="Member Communication"/>	
Subject	
<input type="text" value="Welcome to Gulf Coast Chamber of Commerce"/>	
Template Text	
<p>B <i>I</i> <u>U</u> S ^{x₂} ^{x²} A ▾ T! ▾ 🔍 Insert Merge Field Signatures ▾</p>	
<p>{{ OwnerName }}</p> <p>{{ OrganizationName }}</p> <p>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.</p> <p>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.</p>	
From Email Address cheri.petterson@micronetonline.com	
Make Available to All Users <input checked="" type="checkbox"/>	

Contact Management

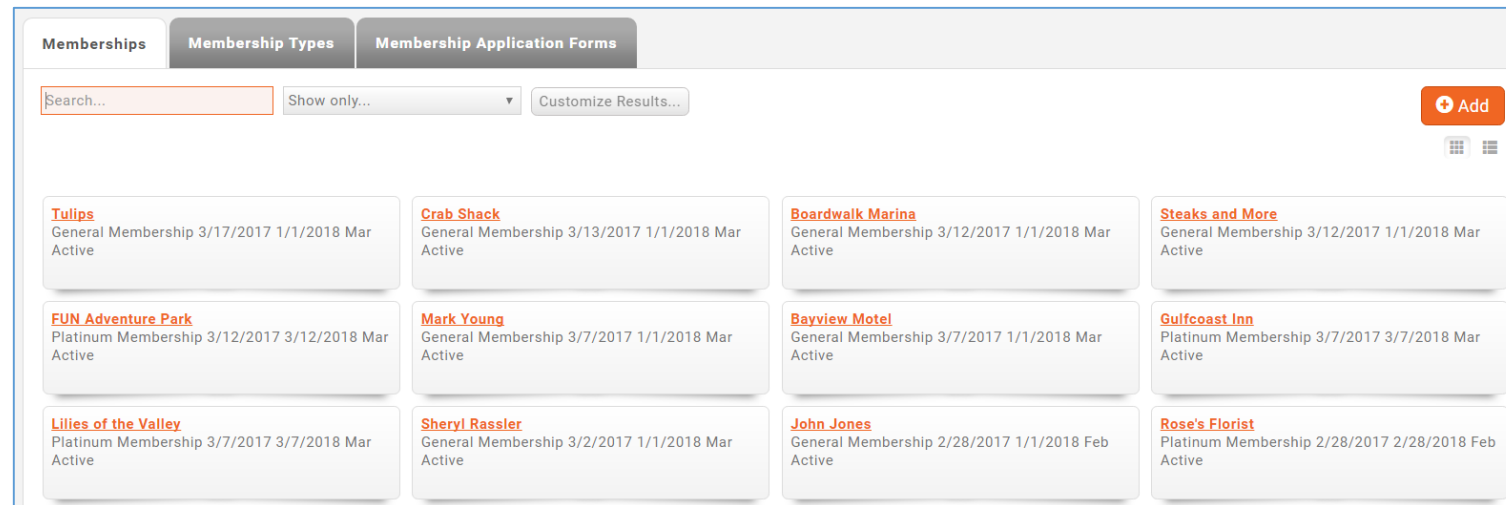
- Contact Management allows you to easily track your new contacts you have made face to face, over the phone, via the web



The screenshot shows the contact management interface for a contact named "Tulips". At the top, there is a profile picture of tulips, the name "Tulips", and a status of "[Non-Member] [Account Number]". 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. The left column contains sections for Contact Info (Work: tpetterson@mailinator.com), Contacts (Tami Petterson, User - View Only in Info Hub), Lists/Committees (Prospective Members, 3/16/2017), Categories (Florists, Business Category), and Assigned Staff (None to display). The right column contains sections for Memberships (None to display), Communication (3/16/2017 12:37 PM, Welcome to the Chamber, CP, 0), Activity (3/12/2017, New Sales Opportunity), Related Organizations (None to display), and Projects (None to display). An "Actions" menu is visible on the right side of the interface.

Membership Management

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



The screenshot displays the 'Memberships' section of the GrowthZone software. It features a navigation bar with 'Memberships', 'Membership Types', and 'Membership Application Forms'. Below the navigation bar, there is a search bar, a 'Show only...' dropdown menu, and a 'Customize Results...' button. A red '+ Add' button is located in the top right corner. The main content area shows a grid of 12 membership cards, each representing a different member and their membership details.

Member Name	Membership Type	Start Date	End Date	Status
Tulips	General Membership	3/17/2017	1/1/2018	Mar Active
Crab Shack	General Membership	3/13/2017	1/1/2018	Mar Active
Boardwalk Marina	General Membership	3/12/2017	1/1/2018	Mar Active
Steaks and More	General Membership	3/12/2017	1/1/2018	Mar Active
FUN Adventure Park	Platinum Membership	3/12/2017	3/12/2018	Mar Active
Mark Young	General Membership	3/7/2017	1/1/2018	Mar Active
Bayview Motel	General Membership	3/7/2017	1/1/2018	Mar Active
Gulfcoast Inn	Platinum Membership	3/7/2017	3/7/2018	Mar Active
Lilies of the Valley	Platinum Membership	3/7/2017	3/7/2018	Mar Active
Sheryl Rassler	General Membership	3/2/2017	1/1/2018	Mar Active
John Jones	General Membership	2/28/2017	1/1/2018	Feb Active
Rose's Florist	Platinum Membership	2/28/2017	2/28/2018	Feb Active

Membership Management

- Membership Application Form
 - Integrated to 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 <input type="text"/>	Recurring Revenue <input type="text"/>	Estimated Close Date <input type="text"/> 
Probability <input type="text"/>	Stage -- select a Stage -- 	Status Active	Won/Lost Date <input type="text"/> 

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:
 Display Mode:

Results

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

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		
Count\Average\Totals	2				\$100.00	\$3,200.00	\$3,300.00					

Retain & Engage Your Members

- Events Management
- Info Hub
- Events Expo*
- Web Content*
- Fundraising*
- On-line Store*
- Certification*

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



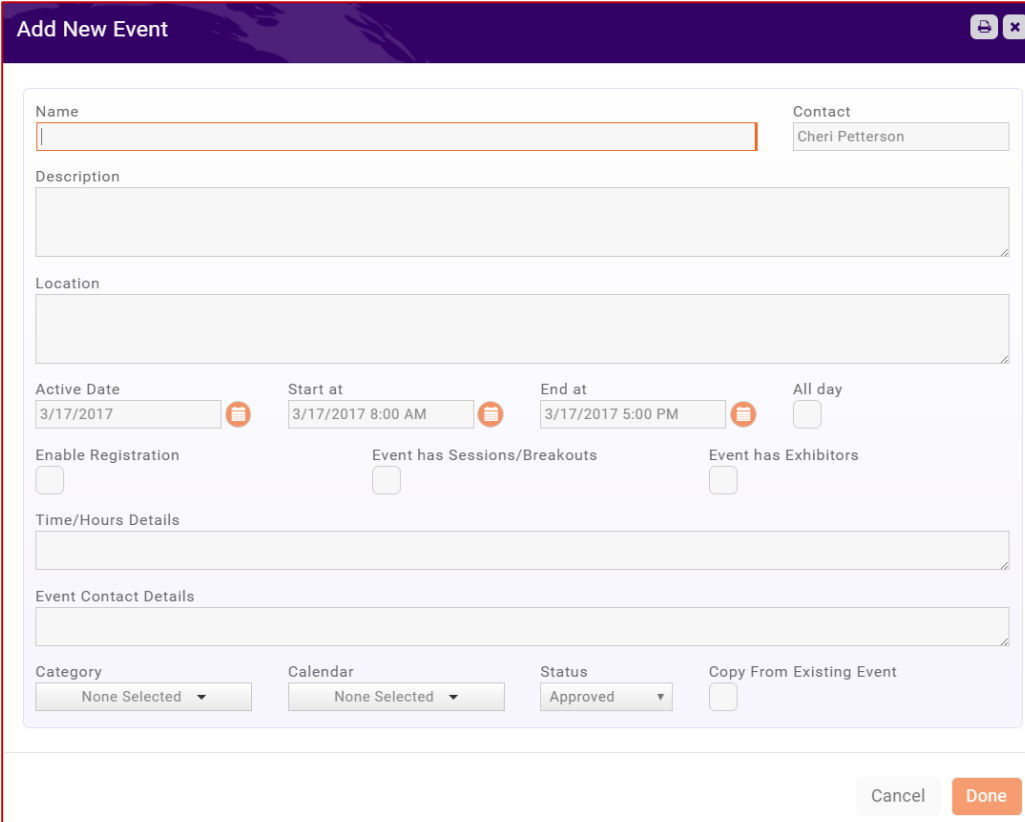
Additional Information

Event Contact:
 Cheri Petterson
 218-546-5413

Powered By MemberZone

Events Management

- Add Events
- Manage Registration
- Manage Sessions/Break-outs
- Manage Exhibitors (Coming Soon)
- Manage Sponsors
- Manage Fees
- Manage Attendance
- Manage Communications



The screenshot shows the 'Add New Event' form with the following fields and options:

- Name:** A text input field.
- Contact:** A dropdown menu with 'Cheri Petterson' selected.
- Description:** A large text area.
- Location:** A large text area.
- Active Date:** A date picker set to 3/17/2017.
- Start at:** A time picker set to 3/17/2017 8:00 AM.
- End at:** A time picker set to 3/17/2017 5:00 PM.
- All day:** An unchecked checkbox.
- Enable Registration:** An unchecked checkbox.
- Event has Sessions/Breakouts:** An unchecked checkbox.
- Event has Exhibitors:** An unchecked checkbox.
- Time/Hours Details:** A large text area.
- Event Contact Details:** A large text area.
- Category:** A dropdown menu with 'None Selected' selected.
- Calendar:** A dropdown menu with 'None Selected' selected.
- Status:** A dropdown menu with 'Approved' selected.
- Copy From Existing Event:** An unchecked checkbox.

At the bottom right, there are 'Cancel' and 'Done' buttons.

Events Management - Reporting

- Activity Report
- Attendee Report
- Discount Report
- Sessions Report
- Sponsorship Report

Event Activity Report

Contact: Date Range: Display Only Contacts:

Event:

Criteria / Filters:

Display Options

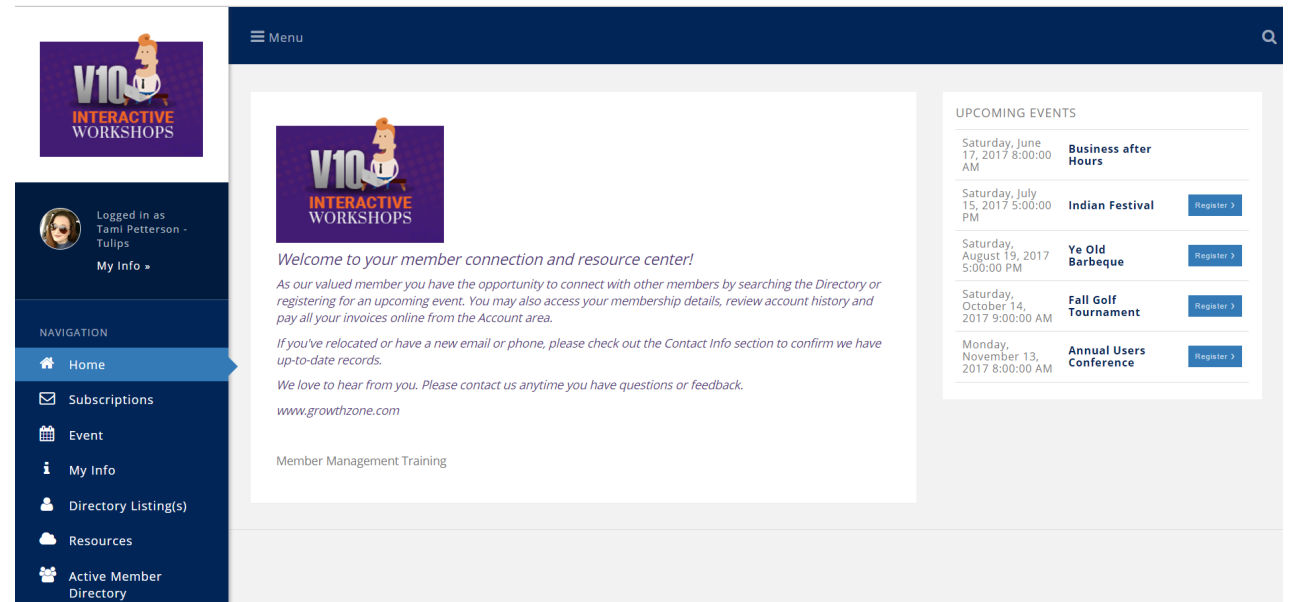
Fields to Display: Summarize By: Display Mode:

Results

Contact Name	Default Email	Default Phone	Event Name	Event Start Date	Event End Date	Registration Status	Registration Type	Total Registration Fee	
Cheri Petterson	cheri.petterson@micronetonline.com	218-546-5413	Summertime Barbecue & Music Festival	7/22/2017	7/23/2017	Invited			
Cheri Petterson	cheri.petterson@micronetonline.com	218-546-5413	Spring Wine Dinner & Auction	4/16/2017	4/16/2017	Registered	Spring Wine Dinner Registration Fee	\$75.00	
Cheri Petterson	cheri.petterson@micronetonline.com	218-546-5413	Meet The Community	3/25/2017	3/25/2017	Registered	Meet the Community Early Registration	\$12.00	
Steve Johnson	sjohnson@mallinator.com		Spring Wine Dinner & Auction	4/16/2017	4/16/2017	Registered	Spring Wine Dinner Registration Fee	\$75.00	
Count\Average\Totals								4	\$162.00

Info Hub

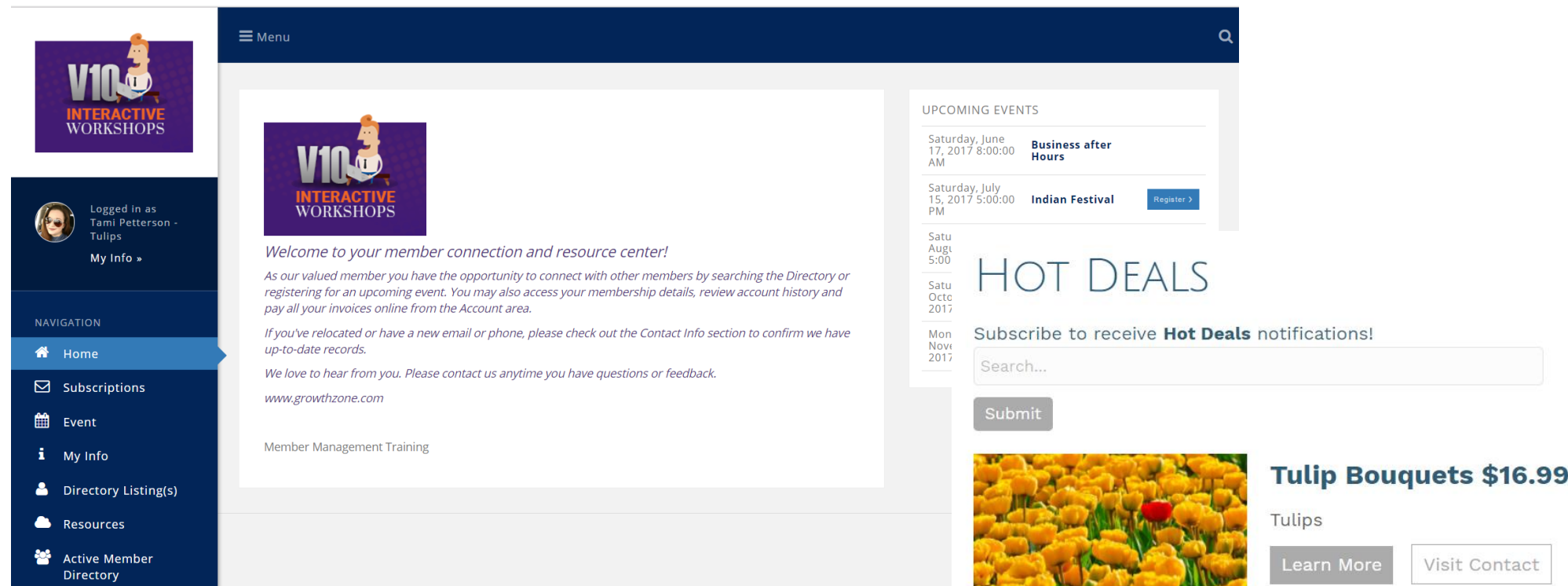
- Members can update your own information (photos, directory listing, website, etc.)
- Manage their account and pay their bills
- Register for Events, enter New Events
- Enter Hot Deals, Member to Member Deals, & Job Postings...



The screenshot shows a member portal for V10 Interactive Workshops. The page features a dark blue header with a 'Menu' icon and a search icon. A left sidebar contains a navigation menu with options: Home, Subscriptions, Event, My Info, Directory Listing(s), Resources, and Active Member Directory. The main content area displays a welcome message: 'Welcome to your member connection and resource center!' followed by text about member benefits and contact information. A right sidebar lists 'UPCOMING EVENTS' with details for 'Business after Hours', 'Indian Festival', 'Ye Old Barbeque', 'Fall Golf Tournament', and 'Annual Users Conference', each with a 'Register >' button.

Web Content*

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



The screenshot shows a member portal interface. On the left is a dark blue navigation sidebar with a user profile for 'Tami Petterson - Tulips' and menu items: Home, Subscriptions, Event, My Info, Directory Listing(s), Resources, and Active Member Directory. The main content area features a 'V10 INTERACTIVE WORKSHOPS' logo and a welcome message: 'Welcome to your member connection and resource center!'. Below this is a 'HOT DEALS' section with a search bar and a 'Submit' button. A featured deal for 'Tulip Bouquets \$16.99' is displayed with a photo of yellow tulips and buttons for 'Learn More' and 'Visit Contact'. A calendar on the right lists upcoming events: 'Business after Hours' on June 17, 2017, and 'Indian Festival' on July 15, 2017.

Fundraising*

- 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: [blank]

Current Amount Paid: [blank]

Remaining to Goal: [blank]

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	[icon]
Bikes Bikes Bikes	Special Olympics	\$100.00	\$0.00	One Time Donation	6/1/2017	[icon]
Matt Anakkala	Special Olympics	\$100.00	\$0.00	One Time Donation	5/11/2017	[icon]
Henry James	Special Olympics	\$100.00	\$0.00	One Time Donation	5/8/2017	[icon]
Cherle Swanson	Special Olympics	\$100.00	\$0.00	One Time Donation	4/27/2017	[icon]
Cheri Petterson	Special Olympics	\$100.00	\$0.00	One Time Donation	4/18/2017	[icon]
Jerry Mannard	Special Olympics	\$100.00	\$100.00	One Time Donation	4/7/2017	[icon]
Daphne Duck	Special Olympics	\$100.00	\$0.00	One Time Donation	4/7/2017	[icon]
Joan Jett	Special Olympics	\$100.00	\$0.00	One Time Donation	3/26/2017	[icon]
Cheri Petterson	Special Olympics	\$500.00	\$500.00	One Time Donation	3/17/2017	[icon]

Overview

- 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

\$ 40.00

[Details](#)

[Add To Cart](#)



LOGO BACKPACK

\$ 50.00

[Details](#)

[Add To Cart](#)



LOGO BASEBALL CAPS

\$ 25.00

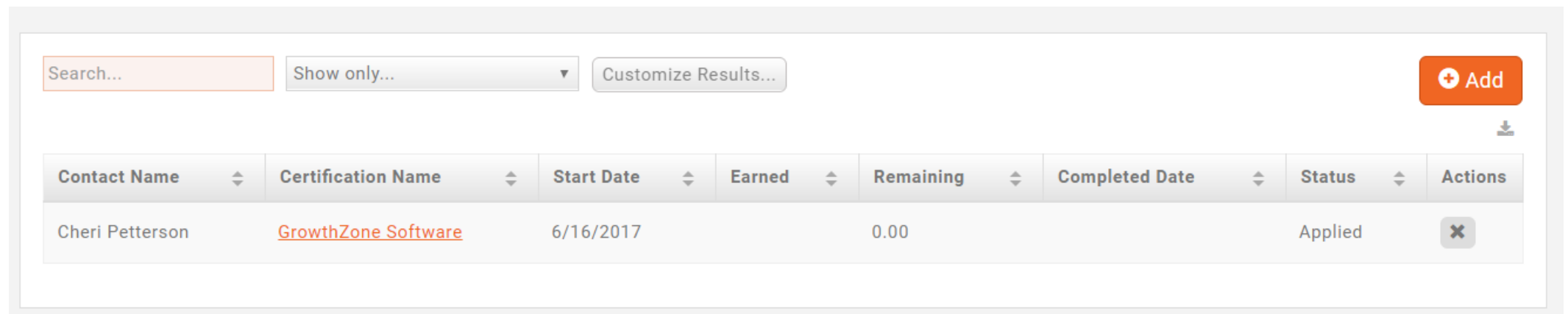
[Details](#)

[Add To Cart](#)


Certification

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 plus sign and the text "Add", and a 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. The table contains one row of data: Cheri Petterson, GrowthZone Software, 6/16/2017, 0.00, Applied, and an Actions column with a close icon (X).

Contact Name	Certification Name	Start Date	Earned	Remaining	Completed Date	Status	Actions
Cheri Petterson	GrowthZone Software	6/16/2017		0.00		Applied	

Do More with Less Time

- Billing
- Reporting
- Forms*
- Project Management*

Billing

- Easy creating of invoices
- Accepting Payments
- Integrated Payment Processing

Overview	Pending Delivery	Payments	Invoices	Upcoming Billing	Upcoming Recognition	Deposits	Credit Memos	Accounting Summary
Invoicing			Payments					
6	Invoices Ready to Email	\$8,170.83	3	Undeposited payments	\$2,875.00			
0	Invoices Ready to Print	\$0.00	Accounts Receivable					
0	Invoices Ready to Print and Email	\$0.00	29	Total Accounts Receivable	\$32,564.58			
			0	Accounts Receivable over 90 Days	\$0.00			
Common Tasks			Reports			Setup		
Create New Invoice Enter Check Payment Enter Cash Payment Enter Credit Card Payment			Accounts Receivable Accounts Receivable (Detail) Integrated Processing Monthly Statement Integrated Processing Monthly Transfers			Chart of Accounts Memberships/Products/Services Add/Edit Invoice & Statements Templates		

Reporting

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

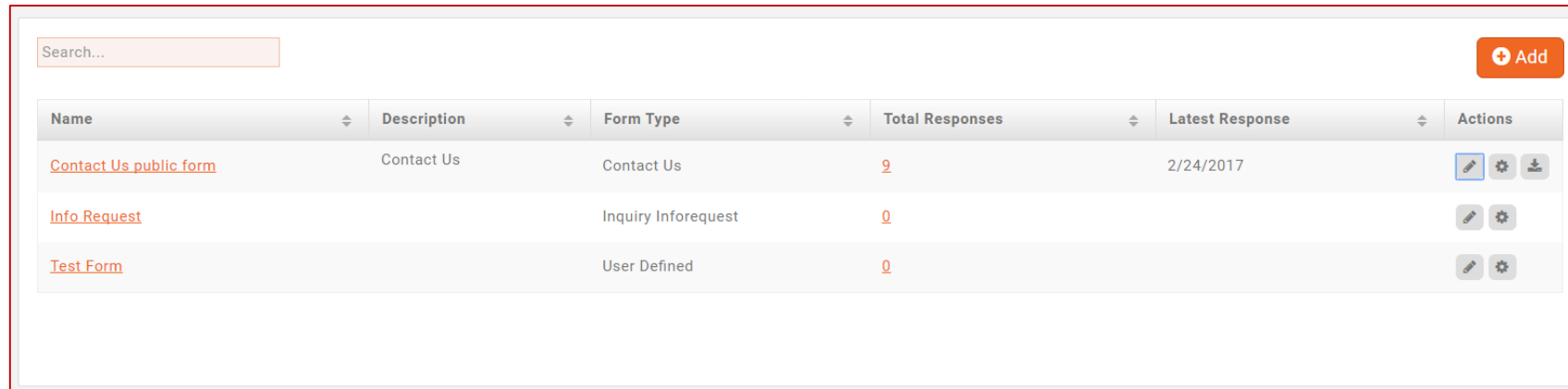
Search... Billing Accounting Customize Results... Category: Billing_Accounting x [Clear All]

Result Count: 18








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

Form Builder*

- 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 data.

Name	Description	Form Type	Total Responses	Latest Response	Actions
Contact Us public form	Contact Us	Contact Us	9	2/24/2017	  
Info Request		Inquiry Inforequest	0		 
Test Form		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

Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
Welcome Letter	Important	Members On-boarding		Brandon Zinda			0
Ambassador Visit	Important	Members On-boarding		Sheryl Rassler			0
Welcome Email	Important	Members On-boarding		Brandon Zinda			0

⚡ Actions

Questions??

For additional training, contact training@growthzone.com