



GrowthZone

Orlando User Group

Maximizing Reports

Presenter: Theresa Lambert
GrowthZone Real Estate Onboarding Manager

Historical Membership Report

TL Historical Membership

Run Report

Target Date

11/7/2022



Membership Type

None Selected

Additional Criteria / Filters



Display Options

Fields to Display

Contact Name, Default Email, Default Phone, Drop Reason, Membership, Membership Activation Type, Membership End Date, Membership Start Date, Membership Status, Renewal Month, Term Price, Term Price inc voluntary,



Summarize By



Membership Activation Type



Add Summarize By

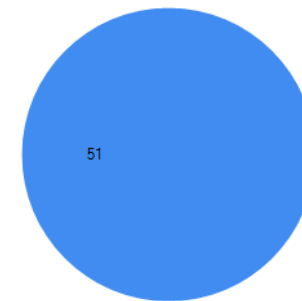
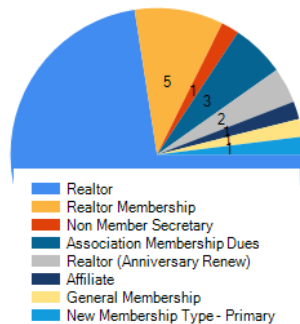
Display Mode

Detail

Display Summary Count



Results: 51



No Drop Reason

RPAC Voluntary Contributions

TL Voluntary Payment Report (RPAC)

[Run Report](#)

TL Voluntary Payment Report (RPAC) [View More](#)

Invoice Date Range

No Dates Selected

Payment Date Range

No Dates Selected

Additional Criteria / Filters



Display Options

Fields to Display

Invoice Date, Invoice Ref #, Paid Date, Voluntary Amount Paid, Voluntary Amount Suggested, Voluntary Item Description, Contact Name, Default Email, Default Phone, NRDS Id,



Summarize By



[Add Summarize By](#)

Display Mode

Detail



Results: 119



Page 1 of 2



Contact Name	NRDS Id	Voluntary Item Description	Voluntary Amount Suggested	Voluntary Amount Paid	Invoice Date	Invoice Ref #	Paid Date	Default Email	Default Phone
Penelope Jopp	707510022	RPAC Fee (optional)	\$37.50	\$0.00	3/23/2021	12		penny.jopp@mailinator.com	(218) 325-3318
Penelope Jopp	707510022	RPAC Fee (optional)	\$37.50	\$0.00	3/23/2021	11		penny.jopp@mailinator.com	(218) 325-3318
Shelly Satre	500502303	RPAC Fee (optional)	\$37.50	\$0.00	3/26/2021	13			
Anthony Jopp	707510024	RPAC Fee (optional)	\$37.50	\$0.00	3/26/2021	14		anthony.jopp@mailinator.com	(218) 325-3319
Don Richardson	707510026	RPAC Fee (optional)	\$37.50	\$0.00	4/9/2021	15		don.richardson@mailiantor.com	218-831-6957
Don Richardson	707510026	RPAC Fee (optional)	\$37.50	\$37.50	4/9/2021	16	4/9/2021	don.richardson@mailiantor.com	218-831-6957
Sandra Johanssen	707510028	RPAC Fee (optional)	\$33.33	\$33.33	4/23/2021	19	4/23/2021		320-458-9852
Sandra Johanssen	707510028	RPAC Fee (optional)	\$33.33	\$0.00	4/23/2021	18			320-458-9852
Rachel Hanson	707510055	RPAC Fee (optional)	\$33.33	\$33.33	4/23/2021	17	6/18/2021	rachel.hanson@mailinator.com	218-764-2906
Christopher Akers	707510030	RPAC Fee (optional)	\$33.33	\$33.33	4/27/2021	21	4/27/2021	chris.akers@mailinator.com	218-851-6161

Cash and Check Payment to Report to Remit Payment to NAR/State/State RPAC

Member Dues by Dues Type - Check Payments to Remit to National and State

[Run Report](#)

Member Dues by Dues Type - Check Payments to Remit to National and State [View More](#)

Transaction Type

None Selected

Transaction Date Range

Oct 3, 2021 - Oct 10, 2021

Recognition Date Range

No Dates Selected

Create Date Range

No Dates Selected

Account

Fee Item

NAR Assessment, NAR Dues, State Application Fee, State Dues,

Product Category

-- Select a Product Category --

Membership Type

None Selected

Additional Criteria / Filters

+

Payment Type,

Equals

Check

x

Display Options

Fields to Display

COA Account Number, Contact, Credit, Debit, Fee Item, Fee Item Description, Invoice #, Membership Type, Payment Type, Product Category, Recognition Date, TxDate, Default Email, Default Phone, NRDS Id, Payment Check Number,

+

Summarize By

COA Account Number

x

Fee Item

x

[Add Summarize By](#)

Display Mode

Detail

Display Summary Count

✓

3

COA Account Number	Fee Item	NRDS Id	Contact	Credit	Debit	Invoice #	Membership Type	Payment Type	Product Category	Recognition Date	Fee Item Description	TxDate	Default Email	Default Phone	Payment Check Number
12001															
NAR Assessment															
		38805	Aaron	\$0.00	\$35.00	102036	Provisional Member	Check	General	10/8/2021	NAR Assessment	10/8/2021	th...	235	235
		38805	David	\$0.00	\$35.00	102034	Provisional Member	Check	General	10/8/2021	2021 NAR Assessment	10/8/2021	dy...	1181	1181
		38805	Justin	\$0.00	\$35.00	100124	Provisional Member	Check	General	10/8/2021	2021 NAR Assessment	10/8/2021	ju...	1508	1508
				\$0.00	\$105.00										
NAR Assessment Count 3															
NAR Dues															
		38805	Aaron	\$0.00	\$37.50	102036	Provisional Member	Check	General	10/8/2021	NAR Dues	10/8/2021	th...	235	235
		38805	David	\$0.00	\$37.50	102034	Provisional Member	Check	General	10/8/2021	2021 NAR Dues	10/8/2021	dy...	1181	1181
		38805	Justin	\$0.00	\$50.00	100124	Provisional Member	Check	General	10/8/2021	2021 NAR Dues	10/8/2021	ju...	1508	1508
				\$0.00	\$125.00										
NAR Dues Count 3															
State Application Fee															
		38805	Aaron	\$0.00	\$200.00	102036	Provisional Member	Check	General	10/8/2021	State Application Fee	10/8/2021	th...	235	235
		38805	David	\$0.00	\$200.00	102034	Provisional Member	Check	General	10/8/2021	State Application Fee	10/8/2021	dy...	1181	1181
		38805	Justin	\$0.00	\$200.00	100124	Provisional Member	Check	General	10/8/2021	State Application Fee	10/8/2021	ju...	1508	1508
				\$0.00	\$600.00										
State Application Fee Count 3															
State Dues															
		38805	Aaron	\$0.00	\$63.50	102036	Provisional Member	Check	General	10/8/2021	State Dues	10/8/2021	th...	235	235
		38805	David	\$0.00	\$63.50	102034	Provisional Member	Check	General	10/8/2021	2021 State Dues	10/8/2021	dy...	1181	1181
		38805	Justin	\$0.00	\$84.67	100124	Provisional Member	Check	General	10/8/2021	2021 State Dues	10/8/2021	ju...	1508	1508
				\$0.00	\$211.67										
State Dues Count 3															
				\$0.00	\$1,041.67										
12001 Count 12															
Grand Count\Average\Max\Totals 12				\$0.00	\$1,041.67										

Dues Payments Paid by CC-Split to NAR/State/State RPAC

State

Undeposited Sort By Saleable Item - Credit Card - to JE NAR and State

Run Report

Undeposited Sort By Saleable Item - Credit Card - to JE NAR and State

View More

Transaction Type

None Selected

Transaction Date Range

Oct 1, 2021 - Oct 31, 2021

Recognition Date Range

No Dates Selected

Create Date Range

No Dates Selected

Account

Membership Type

None Selected

Fee Item

NAR-Image-State Dues-RPAC

Product Category

-- Select a Product Category --

Additional Criteria / Filters

+

Payment Type,

Equals

Credit Card

x

Display Options

Fields to Display

Account Name, COA Account Number, Contact, Credit, Debit, Fee Item, Fee Item Description, Invoice #, Membership Type, Payment Type, Product Category, Recognition Date, TxDate, Default Email, Default Phone, NRDS Id,

Summarize By

COA Account Number

Fee Item

Display Mode

Detail

Display Summary Count

✓

Add Summarize By

Class/Event Sign in Sheet

Event Sign in Sheet

Run Report

Export to Excel
and add
signature column

Date Range

No Dates Selected

Event Category

None Selected

Calendar

-- Select a Calendar --

List

None Selected

Event

How to Properly Market a Coming Soon Listing
(7/14/2022),

Display Only Contacts

☐

Attendee Registration Status

-- No Choice --

Contact

Additional Criteria / Filters



Display Options

Fields to Display

Event Name, Event Start Date, LicenseNumber, Attendee Email, Attendee Name, NRDS ID,

Summarize By



Display Mode

Detail



Add Summarize By

Event Start Date	Event Name	Attendee Name	LicenseNumber	NRDS ID	Attendee Email	Signature
7/14/2022	How to Properly Market a Coming Soon Listing	Agent Broker	6958545421	999999999	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Attendee Name	6958545499	888888888	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Broker Agent	6958548888	777777777	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Johnny Appleseed	6958577777	666666666	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Some Agent	6958566666	555555555	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Person Name	6958555555	444444444	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Kati Broker	6958544444	333333333	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Bill Broker	6958533333	222222222	agent@gmail.com	
7/14/2022	How to Properly Market a Coming Soon Listing	Jess Agent	622222222	111111111	agent@gmail.com	

User Account Report

Access Level Type

None Selected ▼

Membership Type

None Selected ▼

Additional Criteria / Filters



Access Level

None Selected ▼

Account Created Within

No Dates Selected ▼

Membership Status

None Selected ▼

Has Account



Fields to Display

Access Levels with Related Organizations, Account Created Date, Account Email, Account Username, Contact First Name, Contact Last Name, Contact Name, Date of Last Password Change, Individual/Default Access Level, Last Login Date/Time, Membership Type, Primary Business, ▼

Summarize By



Add Summarize By

Display Mode

Detail

Results: 2

Contact Name ⚙	Contact First Name ⚙	Contact Last Name ⚙	Primary Business ⚙	Individual/Default Access Level ⚙	Access Levels with Related Organizations ⚙	Account Username ⚙	Account Email ⚙	Account Created Date ⚙	Last Login Date/Time ⚙	Date of Last Password Change ⚙	Membership Type ⚙
Shelly Realtor	Shelly	Realtor	SS Realtor Board INTERNAL	Staff - Admin	SS Realtor Board INTERNAL: Broker	shelly.realtor@mailinator.com	shelly.realtor@mailinator.com	5/19/2021	9/7/2021 9:49 AM		Association Membership Dues
Bill Realtor	Bill	Realtor	SS Realtor Board INTERNAL	Staff - Admin	SS Realtor Board INTERNAL: Staff - Admin	bill.realtor@mailinator.com	bill.realtor@mailinator.com	5/19/2021			
Count 2											

Payment Processing Report

Payment Processing Report

[Run Report](#)

Date Range

No Dates Selected

Additional Criteria / Filters



Display Options

Fields to Display

Contact Name, Amount, Amount Refunded, Authorized, Card Number, Card Type, Charged, Charged Amount, Charged Fees, Created On, Dispute Date, Dispute Status, Failure Reason, Fees, Invoices, Last Refunded On, Net Amount, Payment Check Number, Payment Gateway, Txn ID,



Summarize By



Display Mode

Detail

Add Summarize By

Results: 63

Contact Name	Txn ID	Invoices	Payment Check Number	Card Type	Card Number	Charged Amount	Amount	Charged Fees	Fees	Net Amount	Amount Refunded	Dispute Date	Dispute Status	Created On	Last Refunded On	Authorized	Charged	Failure Reason	Payment Gateway
Adrianna Wicks	18354888	56	18354888	Visa	1881	\$360.00	\$360.00	\$0.00	\$0.00	\$360.00	\$0.00			8/27/2021 2:07 PM		True	True		NAR Ecommerce
Alan Anderson	18369507	115	18369507	Visa	4242	\$108.33	\$108.33	\$0.00	\$0.00	\$108.33	\$0.00			8/4/2022 11:42 AM		True	True		NAR Ecommerce
Alan Anderson	18369507	115	18369507	Visa	4242	\$108.33	\$108.33	\$0.00	\$0.00	\$108.33	\$0.00			8/4/2022 11:42 AM		True	True		NAR Ecommerce
Alan Anderson				Visa	4242	\$305.00	\$305.00	\$0.00	\$0.00	\$305.00	\$0.00			9/1/2022 2:25 PM		False	True	The Credit Card Number must be in valid numeric format.	NAR Ecommerce
Alicia Murphy	18357106	84	18357106	Discover	1117	\$165.00	\$165.00	\$0.00	\$0.00	\$165.00	\$0.00			10/14/2021 3:06 PM		True	True		NAR Ecommerce
Anthony Jopp	0			Mastercard	5100	\$0.00	\$250.00	\$0.00	\$0.00	\$250.00	\$0.00			2/24/2022 10:07 AM		False	False	NAR Ecommerce does not allow saving a payment profile if you are not an active member in NRDS.	NAR Ecommerce
Anthony Jopp	0			Mastercard	5100	\$0.00	\$287.50	\$0.00	\$0.00	\$287.50	\$0.00			3/26/2021 1:58 PM		False	False	You are not a member in Active, Provisional or Suspended Status. Please enter a different NRDS Member Id or select 'No' if you don't know your Id.	NAR Ecommerce
Borden Lake Realty	18363897	105	18363897	Mastercard	5100	\$87.50	\$87.50	\$0.00	\$0.00	\$87.50	\$0.00			5/25/2022 9:01 AM		True	True		NAR Ecommerce
Cardano														1/27/2022				The credit card number or expiration date you entered is not	NAR

Stored Payment Profiles

Stored Payment Profiles Report

Run Report

View More

Payment Gateway Type

-- No Choice --

Payment Gateway

-- Select a Payment Gateway --

Last Successful Payment Date

No Dates Selected

Profile Created Date

No Dates Selected

Additional Criteria / Filters



Display Options

Fields to Display

Expiration Date, Last Successful Payment Date, Payment Gateway Name, Payment Gateway Type, Scheduled Item Count, Contact Name,

Summarize By

Display Mode

Detail

Add Summarize By

Results: 32

Contact Name	Payment Gateway Name	Payment Gateway Type	Last Successful Payment Date	Scheduled Item Count	Expiration Date
Shelly Satre	Visa:*****4242-03/2023	NAR Payment System		0	03/2023
Candace Thompson	MasterCard:*****4444-03/2025	NAR Payment System	1/27/2022	0	03/2025
Don Richardson	Visa:*****4242-04/2023	NAR Payment System	4/9/2021	4	04/2023
Sandra Johanssen	Visa:*****1881-04/2023	NAR Payment System	4/23/2021	0	04/2023

Invalid Email Addresses

Invalid Email Addresses Report

Run Report

Email Validity Change Date

No Dates Selected

Contact

Additional Criteria / Filters

+

Display Options

Fields to Display

Date Invalid, Email Address, Validity Status, Contact Name,

Summarize By

Add Summarize By

Display Mode

Detail

Code of Ethics – Agent Report

Code of Ethics - Agents

Run

Contact Type
Agent

Membership Status
None Selected

Membership Type
None Selected

Membership Level
None Selected

Membership Category
None Selected

Tags
Add Tags

State Province
None Selected

Missing Code of Ethics for Cycle
Cycle 7

Select Criteria/Filters

Criteria / Filters
+

Display Options

Fields to Display
Contact Name, Default Email, Default Phone, Primary Business, Code of Ethics Latest Course Number, Code of Ethics Latest Date, Code of Ethics Latest Year, MLS ID, NRDS ID,

Summarize By
⋮

Display Mode
Detail

Add Summarize By

Results: 57

Contact Name	Default Email	Default Phone	Primary Business	Code of Ethics Latest Date	Code of Ethics Latest Course Number	Code of Ethics Latest Year	NRDS ID
Alexander March	alexander.march@mailinator.com	218-728-0018	Crooked Lake Realty	11/19/2021	20211	2021	3
David Jopp	david.jopp@mailinator.com	(218) 325-3317	Edina Realty - Deerwood	3/15/2021	456123	2021	707510017
Jonna Jopp		(218) 325-3317	Deerwood REALTORS	3/16/2021	456123	2021	707510019
Penelope Jopp	penny.jopp@mailinator.com	(218) 325-3318	Crooked Lake Realty	3/23/2021	fgj546	2021	707510022
Don Richardson	don.richardson@mailinator.com	218-831-6957	Garrison Realty	4/9/2021	20210409C6	2021	707510026
Sandra Johanssen		320-458-9852	Borden Lake Realty	4/23/2021	2021C2	2021	707510028
Christopher Akers	chris.akers@mailinator.com	218-851-6161	Bay Lake Real Estate	4/27/2021	2021C3	2021	707510030
Sheryl Wicks	sheryl.wicks@mailinator.com	3206924050	Onamia Lakes Real Estate	5/19/2021	2021C4	2021	707510033

Accounts Receivable by Product

Run Report

Accounts Receivable by Product

Report Date

11/7/2022



Billing Year

Days Overdue

Saleable Item Type

-- No Choice --

Additional Criteria / Filters



Display Options

Fields to Display

AccountName, Aging, Billing Year, DueDate, Income Account, InvoiceDate, Open Balance, ProductDescription, Ref Number, TxnDate, TxnType, Contact Name,



Summarize By



ProductDescription



Add Summarize By

Display Mode

Detail

Display Summary Count



ProductDescription	TxnType	Ref Number	InvoiceDate	TxnDate	Contact Name	Open Balance	AccountName	DueDate	Aging	Income Account	Billing Year
	Invoice	140	10/1/2022	10/1/2022	Joseph Trello	60.00	System Default Accounts Receivable Account	11/1/2022	6	System Default Income Account	2023
	Invoice	134	10/1/2022	10/1/2022	Joan Anderson	60.00	System Default Accounts Receivable Account	11/1/2022	6	System Default Income Account	2023
						1,893.34					
Association Dues Count 43											
Code of Ethics August - Raffle Tickets - Jake Owen											
	Invoice	114	7/26/2022	7/26/2022	Crooked Lake REALTORS	100.00	System Default Accounts Receivable Account	7/26/2022	104	System Default Income Account	
						100.00					
Code of Ethics August - Raffle Tickets - Jake Owen Count 1											
Code of Ethics August - Raffle Tickets - Ronald Behrens											
	Invoice	126	8/17/2022	8/17/2022	Keller Williams Realty - Crosby	20.00	System Default Accounts Receivable Account	8/17/2022	82	System Default Income Account	
						20.00					
Code of Ethics August - Raffle Tickets - Ronald Behrens Count 1											
Code of Ethics August - Ronald Behrens - Foursomes											
	Invoice	126	8/17/2022	8/17/2022	Keller Williams Realty - Crosby	200.00	System Default Accounts Receivable Account	8/17/2022	82	System Default Income Account	

Member Engagement Report

TL Member Engagement Report

[Run Report](#)

Membership Type

None Selected

Date Between

Jan 1, 2022 - Dec 31, 2022

Additional Criteria / Filters



Display Options

Fields to Display

Contact Membership Status, Contact Name, Membership, Membership Activation Type, Membership Type, Count of Active List/Committee Members, Count of Event Attendees, Count of Event Registrations, Membership Spend, Non-Membership Spend,



Summarize By



Add Summarize By

Display Mode

Detail



Results: 60

Contact Membership Status	Contact Name	Membership	Membership Type	Membership Activation Type	Count of Event Registrations	Count of Event Attendees	Count of Active List/Committee Members	Membership Spend	Non-Membership Spend
Active	Susan Barrutt	Realtor Membership	Realtor Membership	Reactivate			1	595.00	
Active	Marie Walker	New Membership Type - Primary	New Membership Type	Reactivate				630.00	
Active	Brandon Johnson	Realtor Membership	Realtor Membership	New	1	1	1	361.67	
Active	Aaron Smith	Realtor Membership	Realtor Membership	New			1	351.67	
Active	Alexander March	Realtor Membership	Realtor Membership	New	1	1	1	251.67	
Active	Belinda Anderson	Realtor	Realtor	Renewal			1	201.67	
Active	Angel O'Hara	Realtor	Realtor	Renewal			1	491.67	
Active	Joan Anderson	Realtor	Realtor	Renewal			1	678.34	0.00

Don't be afraid to explore
reports!

I trust this gives you a bird's
eye view of all the flexibility
with GZ reports

Thank You !!