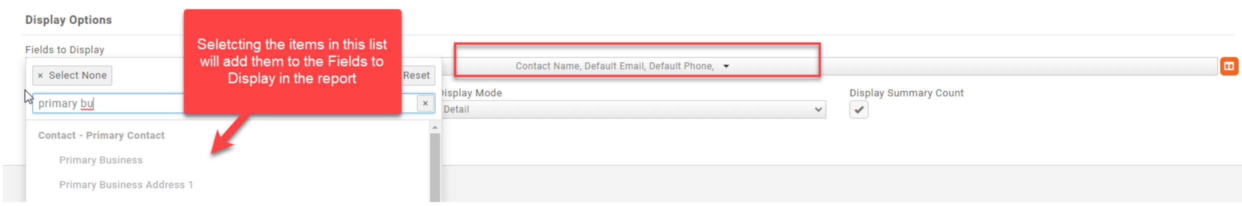
GrowthZone Reports

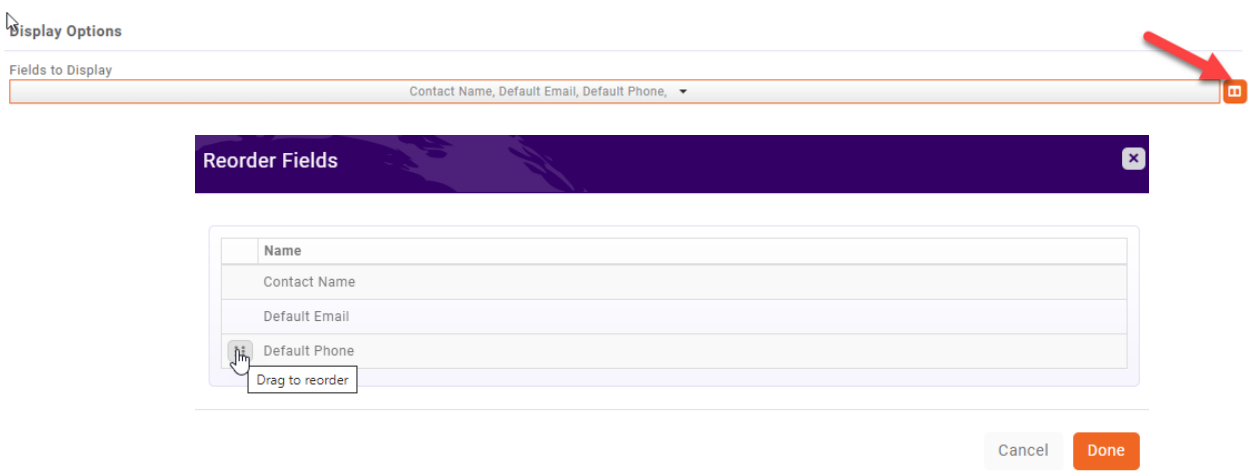
The reports provided in the GrowthZone Software are quite robust. Not only do they allow association staff to customize their query of data, but they also can save them to utilize over and over again without having to rebuild the report.

Reporting Feature Highlights:

Fields to Display – There many options of the fields you would like to display in your report. The display fields would typically be the columns of data you are interested in seeing for each contact.

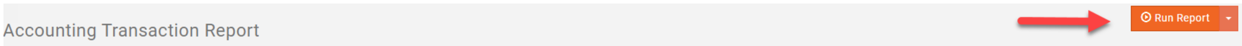


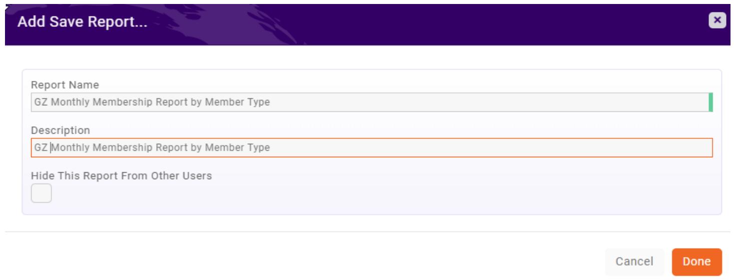
Reordering Data Columns – Once you have the columns to include in the report, you can order the sequence of the columns, if needed. You can do this by clicking the Orange Icon to the right of the Fields to Display.



Additional Filters – Within each report, you also have the capability to filter or drill down to specific data such. For example, you can select *Payment Type* equals Credit Card or Check Payments to filter to those specific results. To add filters simply select the + listed under the Additional Criteria/Filters, then determine what the main field to filter down on would be:

Saving Reports – Once you Run the report, you can Save it as a New Report, name it, and utilize that report on an ongoing basis, without having to rebuild the report. To do the, click on the down arrow next to Run Report button.





Customer Favorite Reports:

The following reports are some of the most common reporting requests we receive from customers. Reports marked with * will be reviewed and run during the User Group session.

Report Usage	GZ Report to Start From	Additional Filter Info
***New members and renewing members**	Historical New Memberships	Filter by Member Type, Summarize by Activation
***Who has paid rpac this year?**	Voluntary Payment Reports	Filter by Year
***Dues payments paid by Check to remit to NAR/State/RPAC**	Accounting Transaction Report	Payment Type = Check Fee Items- NAR/State/RPAC Add NRDS ID to report
***Dues payments paid by CC that split to NAR/State/RPAC**	Accounting Transaction Report	Payment Type = Check Fee Items- NAR/State/RPAC Add NRDS ID to report
Contact information for an offsite event	Event Attendee Report	Select Display Fields for Phone/Cell/Email etc.
Class/Event sign in sheet	Event Attendee Report	Select Display fields NRDS Id/License etc. Export to Excel and add signature column
List of users who set up info hub	User Account Report	No additional Filters
Credit card transaction attempts/completions	Payment Processing Report	Filter by date if applicable
Who has stored credit cards on file?	Stored Payment Profile Report	Filter by Expiration Date
List of invalid email addresses	Invalid Email Addresses Report	No additional Filters
Code of ethics reporting	Code of Ethics – Agents	Filter by Primary Business
Outstanding invoices by item	Accounts Receivable by Product	Summarize by Product Description
How active are my members?	Member Engagement report	No additional Filter