Working with the Staff App

Agenda

How to Navigate the Staff App

How to Manage Contacts

How to Manage Events

How to Manage Lists/Committees

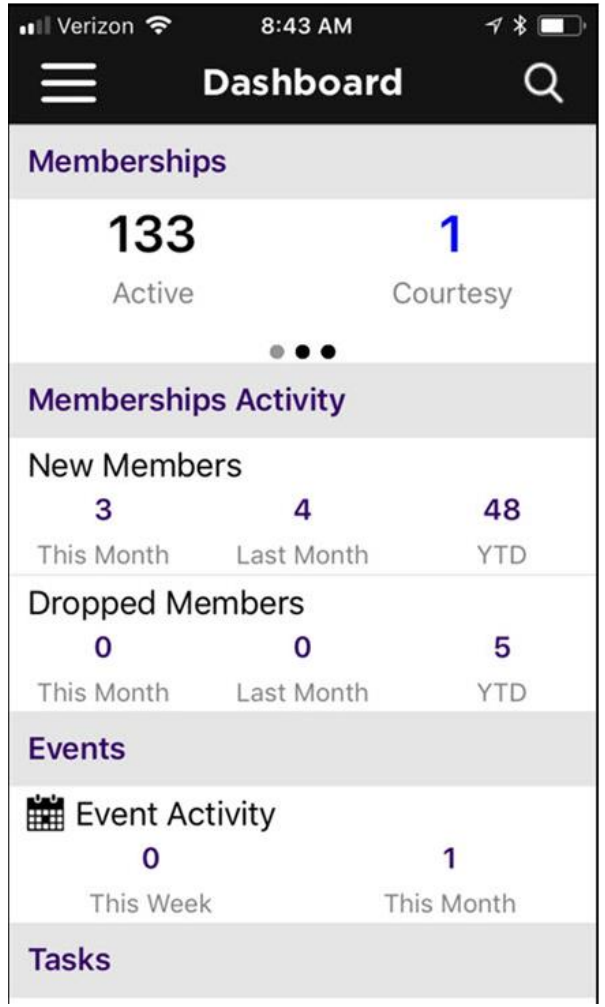
How to Manage Tasks

GrowthZone smarter association software

Overview

The GrowthZone staff app is designed to help association staff accomplish some tasks while on the road meeting members or managing an event

It provides great flexibility for folks working with membership and events and does have the ability to receive payment on site at an event. Any work you do in the app, including edits, will be reflected in the "full" database as well



Overview

The GrowthZone Staff App consists of 5 of modules:

Contacts:

Allows user to Add/Edit contacts

Ability to sort contacts

Scan business cards to add contact to database

Contact's information is "clickable" – which means tapping an address opens their location in device's default map app, their email address opens a new email draft, and a phone number triggers a phone call to start.

Events

Register and Check users into an event

Ability to scan QR codes to check people in

Calendar events can be added to devices default calendar app

Overview

Lists/Committees

View members of lists/committees

Add members to lists/committees

Remove members from lists/committees

Tasks

Ability to view active tasks assigned to you on the go

Ability to mark tasks as completed

Resources

Ability to view resources

Ability to add resources

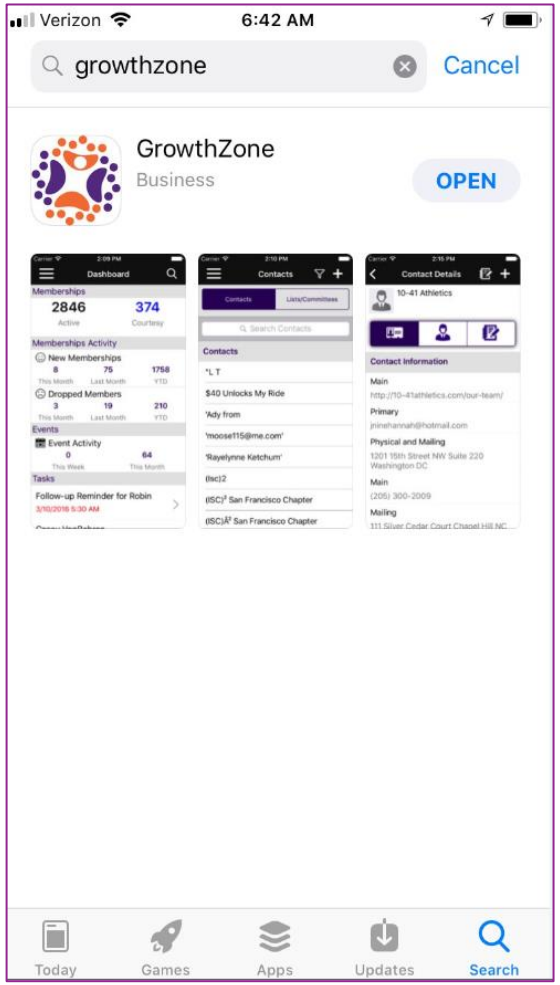
Overview

Download the Staff App

The Staff App is available for both Apple and Android devices

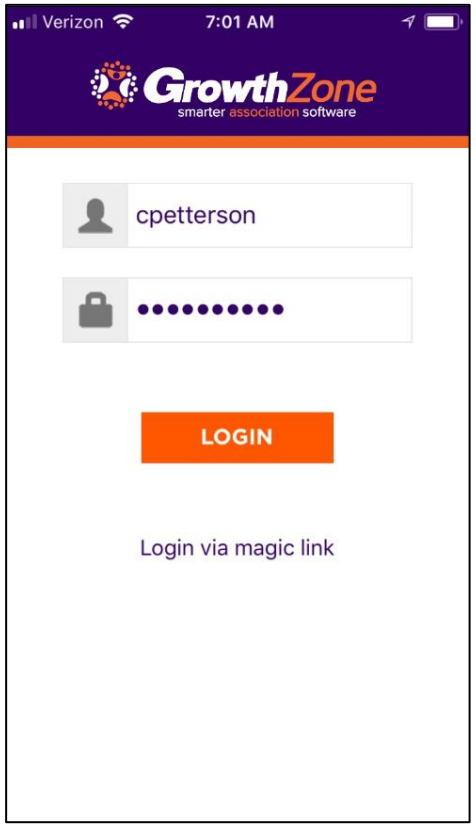
Compatibility:

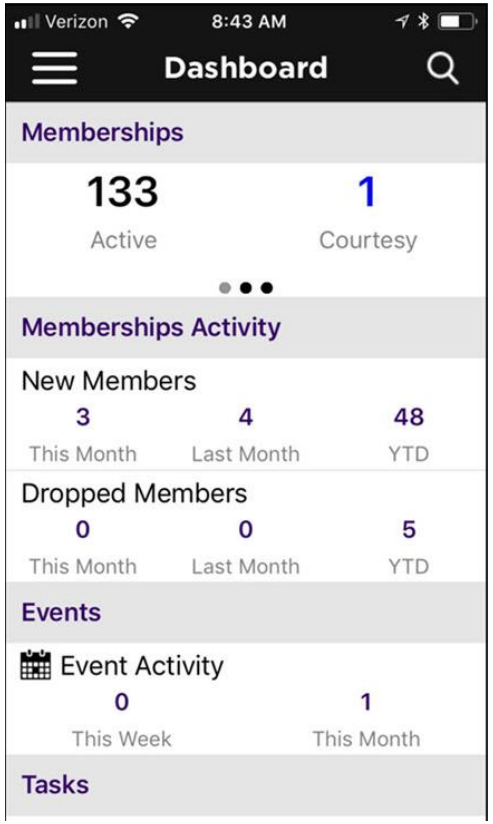
- *Apple: Requires iOS 8.0 or later. Compatible with iPhone, iPad and iPod touch*
- *Android: Requires Android 4.4 or greater*



Staff App Navigation

Log-in to the Staff App using the credentials you use to access the database



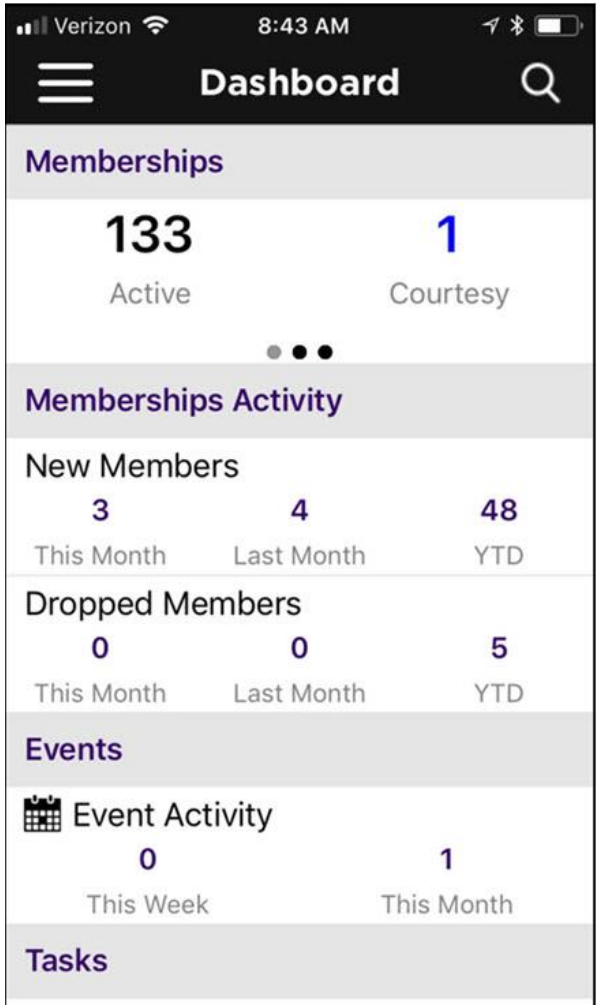


Staff App Navigation

When the Staff App is first launched, your Dashboard will be displayed

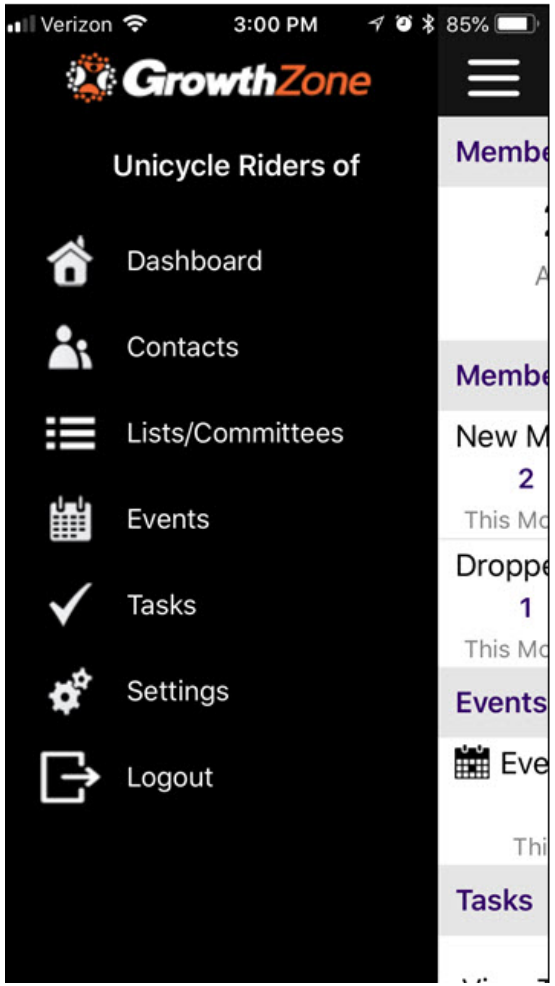
The Dashboard provides an at a glance understanding of your Memberships, Events, Tasks and Lists and Committees

KB: Staff App Navigation



Staff App Navigation

Click the ☰ to view the left-hand navigation panel



Using the Staff App for Contact Management

- Allows user to Add/Edit contacts
- Ability to sort contacts
- Scan business cards to add contact to database
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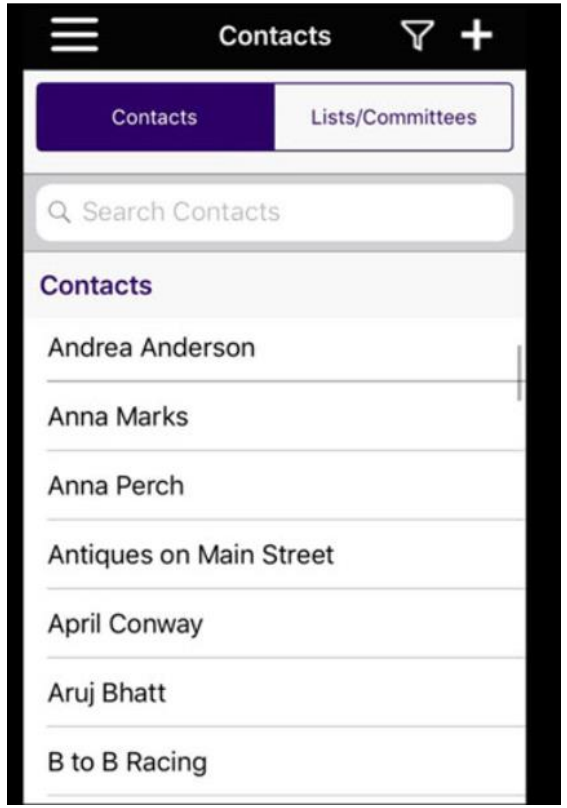
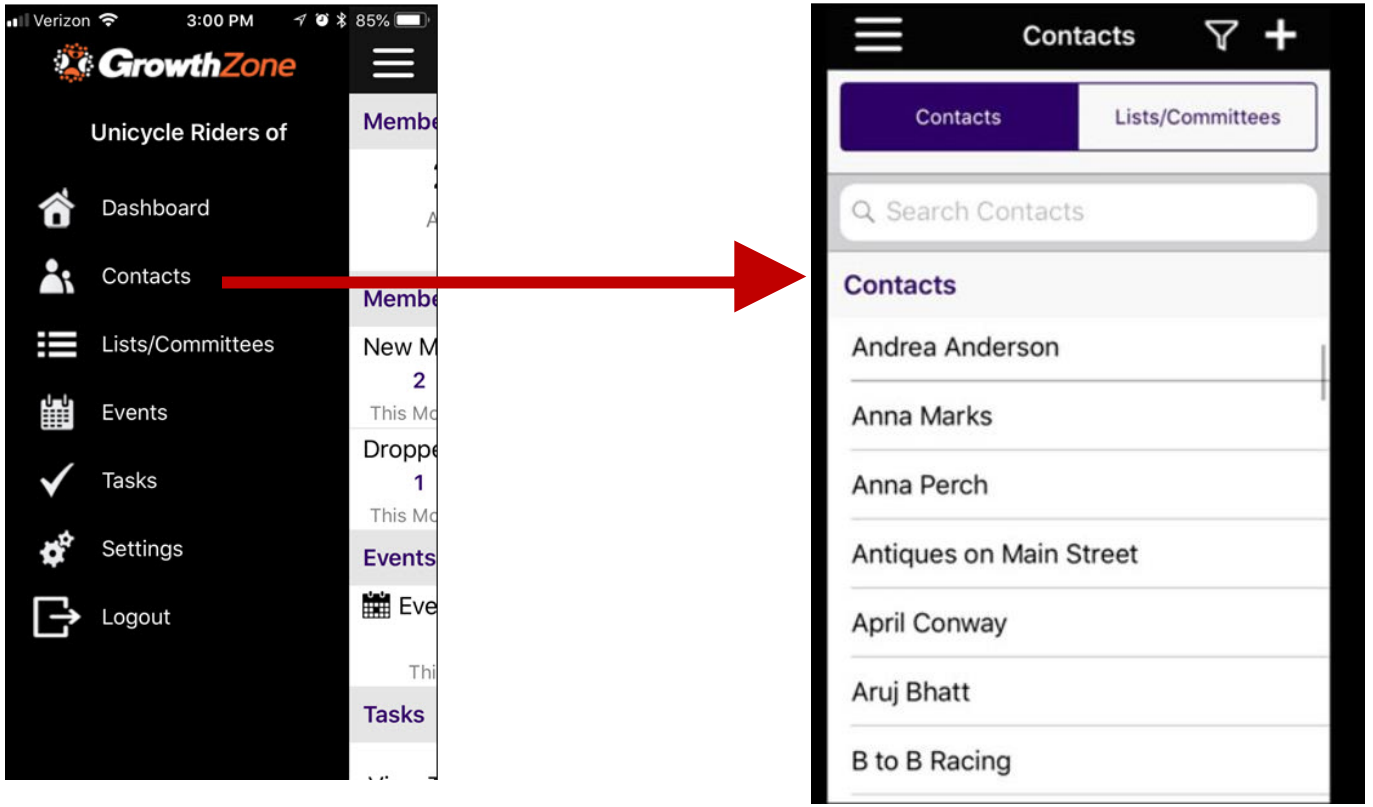


Using the Staff App for Contact Management

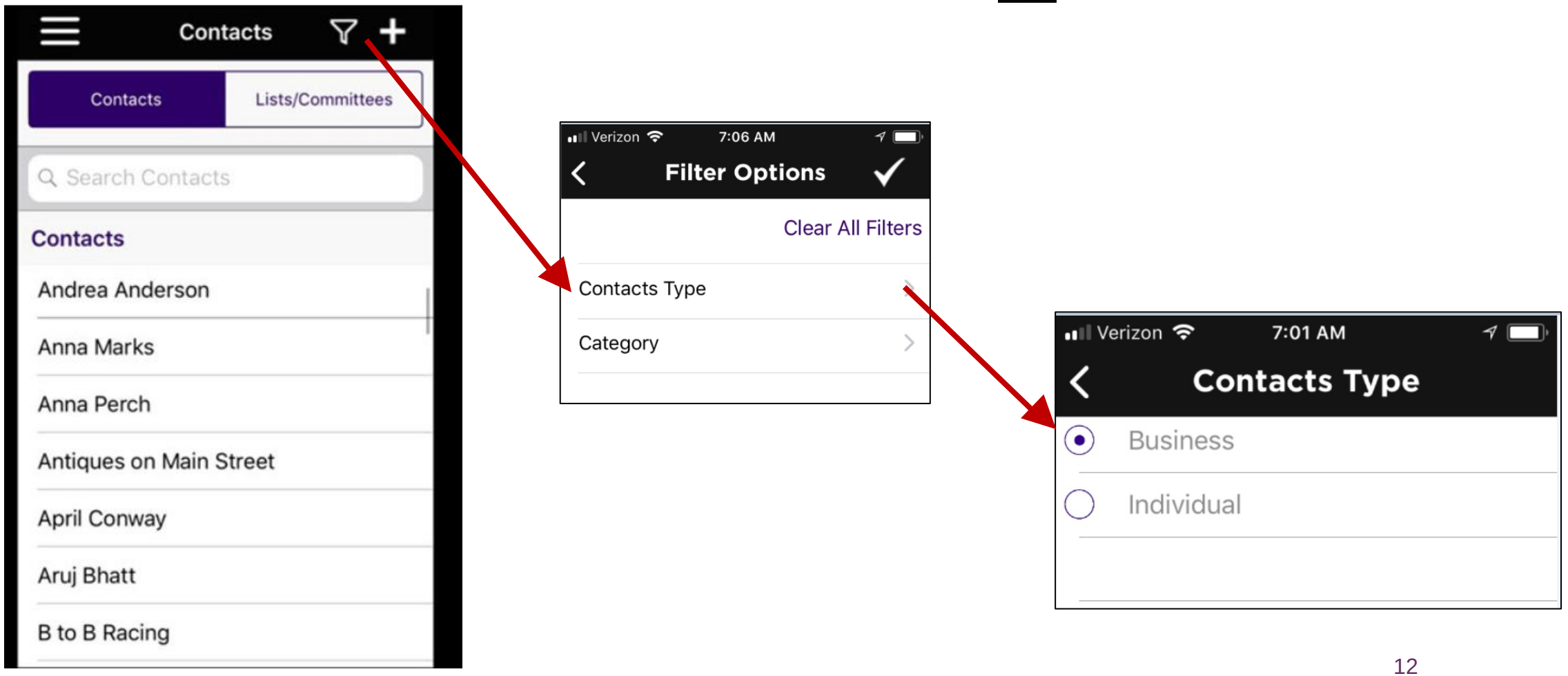
With the Staff App, you can easily view your contacts

KB: View Contacts



Using the Staff App for Contact Management

Easily filter your contacts by clicking the filter icon



Using the Staff App for Contact Management

Icons make it easy to work with your contacts

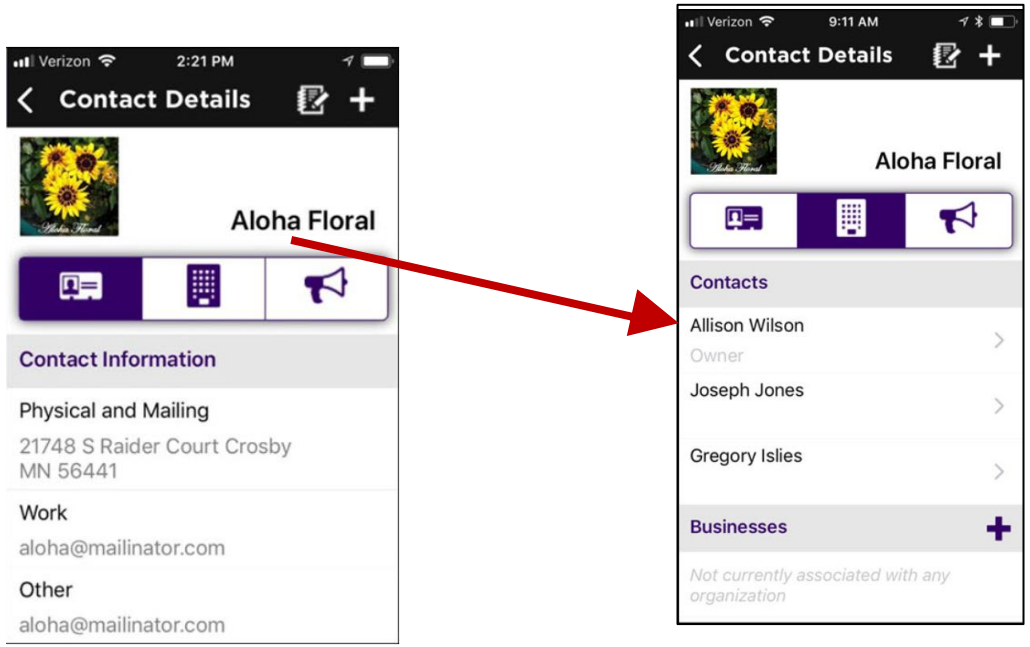
Tab	Description
	Displays the Contact's Information. This includes general contact information, membership information, billing information, list & committees, and, if working with an individual, Hub information.
	Displays the individuals associated with the contact, if the contact is a business and the businesses the contact is related to if the contact is an individual.
	Displays communications (notes, emails, etc.) with the contact.

GrowthZone smarter association software

Using the Staff App for Contact Management

Once you have selected the appropriate contact, you can view the individuals related to an organization, or the organization related to an individual

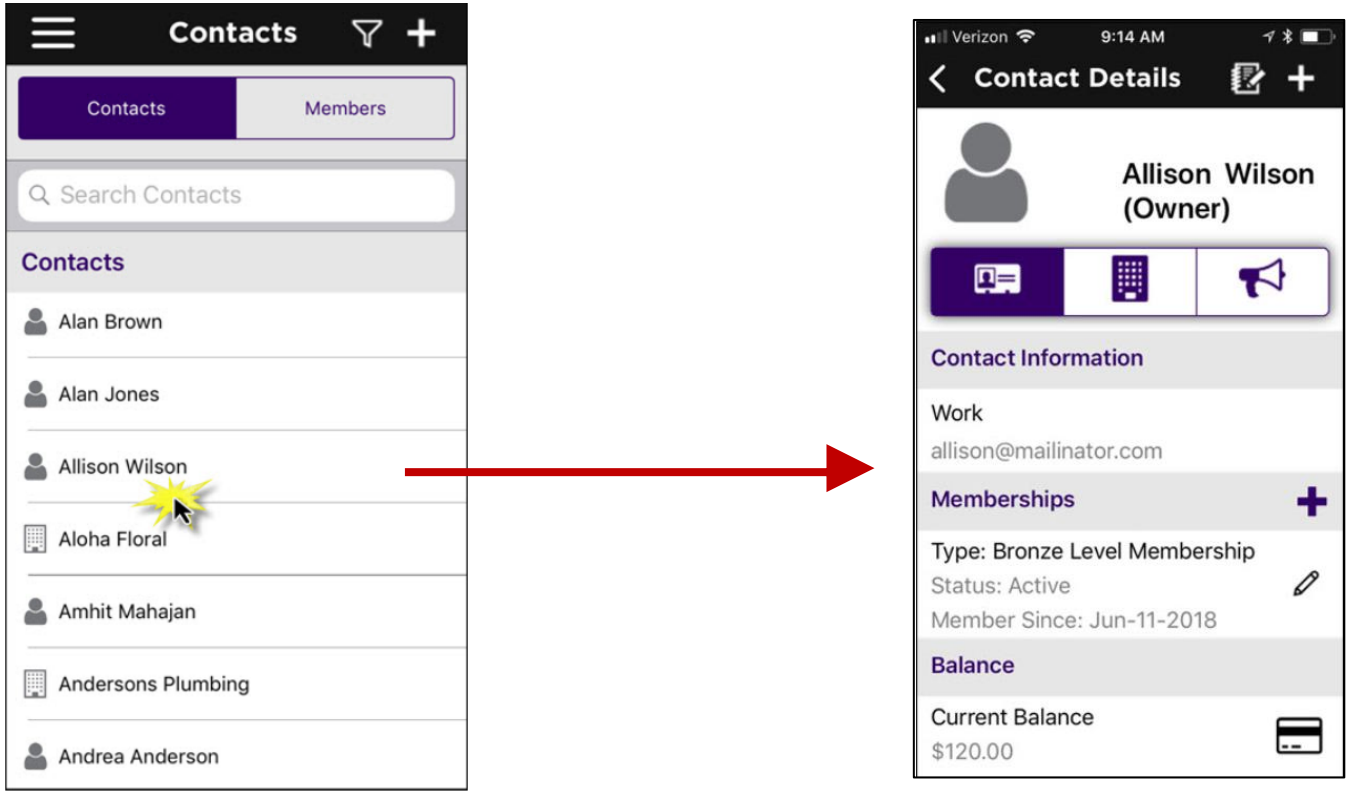
KB: View Individuals related to an Organization



Using the Staff App for Contact Management

If working with an individual, view the organizations related to that individual

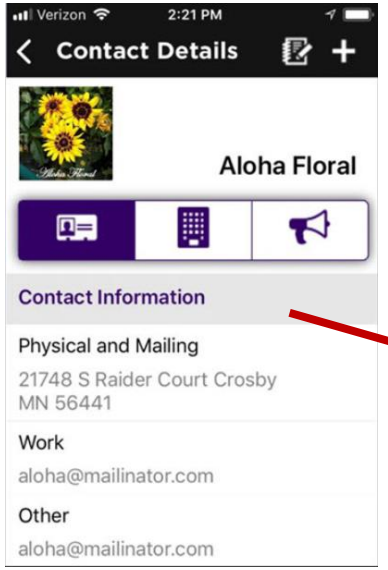
KB: View Organizations related to an Individual

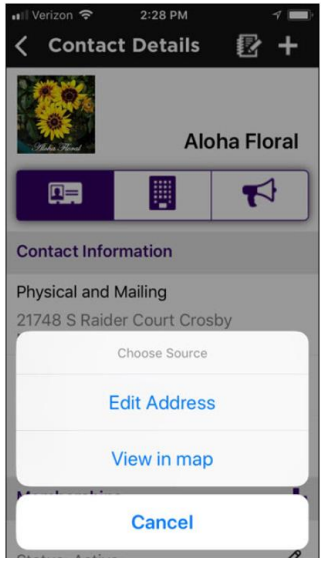


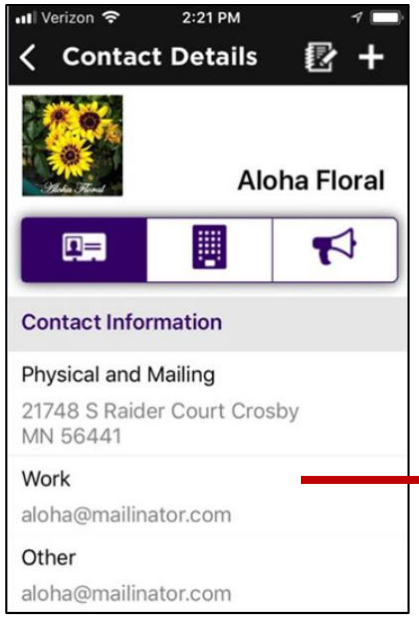
Using the Staff App for Contact Management

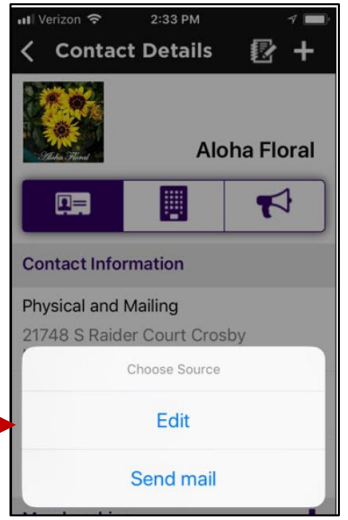
Contact information that currently exists in your database is easily updated using the Staff App – simply click the information you wish to change

KB: Update Existing Contact Information









Using the Staff App for Contact Management

Additional contact information can easily be added to an existing contact using the Staff App

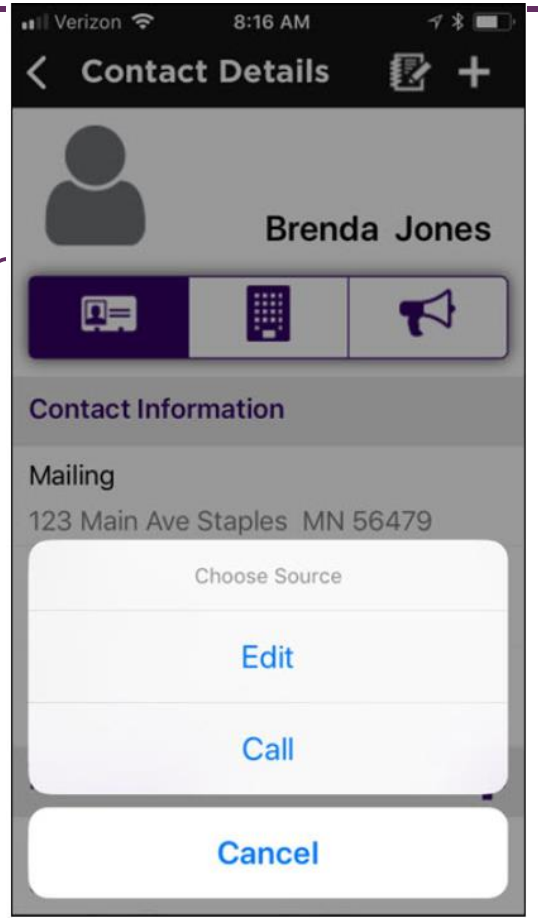
KB: Add Additional Contact Information

Using the Staff App for Contact Management

The Staff App allows you to locate the phone contact and give them a call

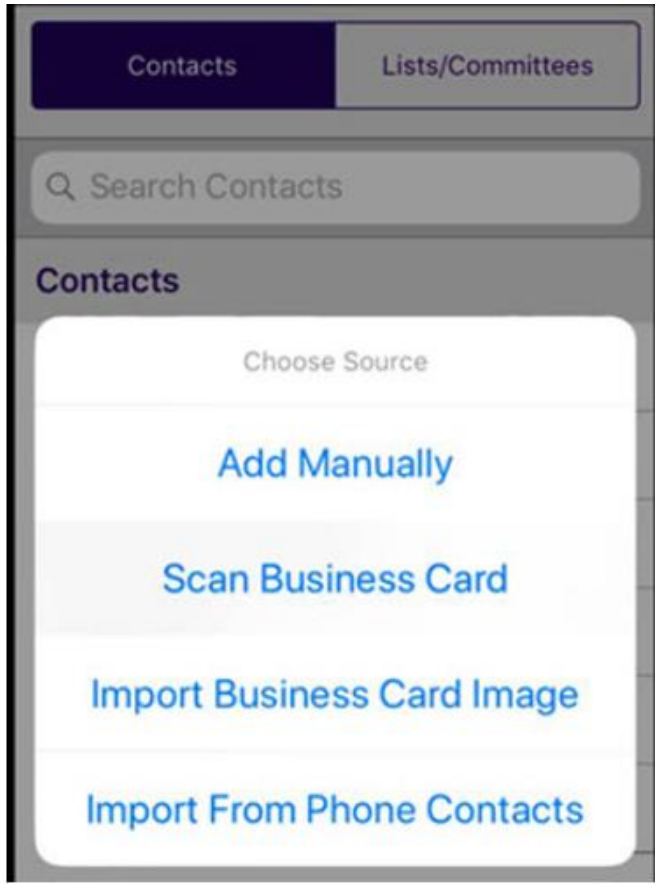
On the Contact Information tab, click the cor number

KB: Call a Contact Using the Staff App



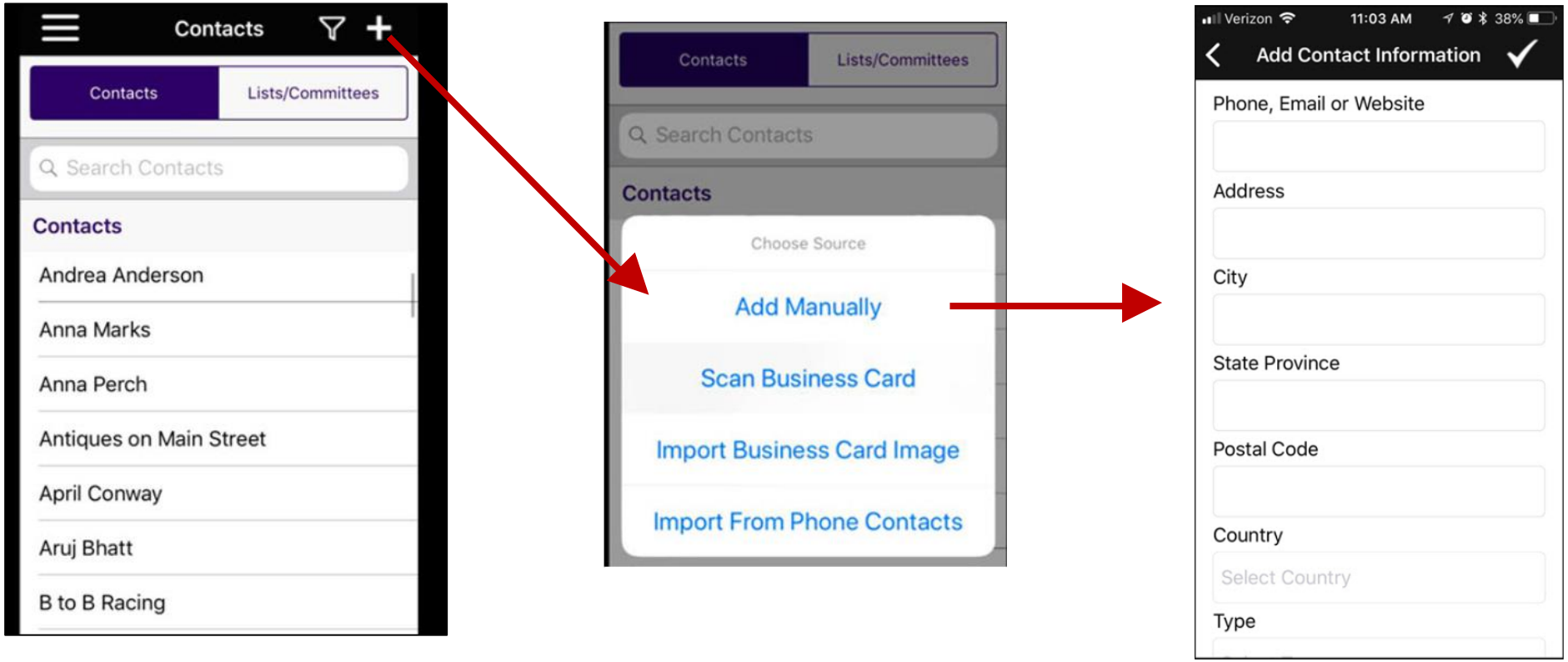
Using the Staff App for Contact Management

With the Staff App you can easily add new contacts to your database…



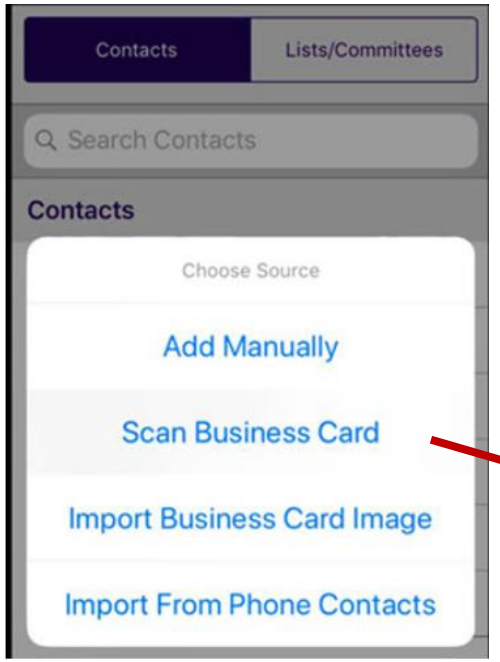
Using the Staff App for Contact Management

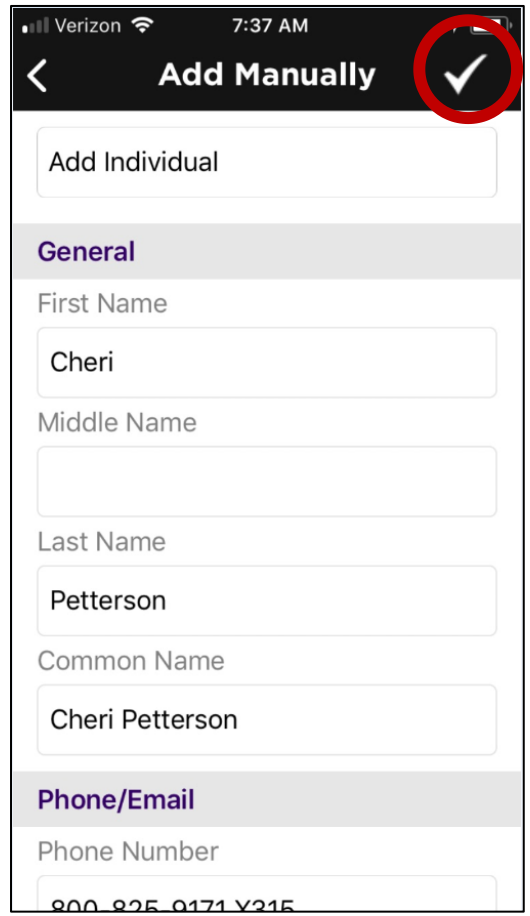
KB: Add a Contact Manually



Using the Staff App for Contact Management

KB: Scan A Business Card

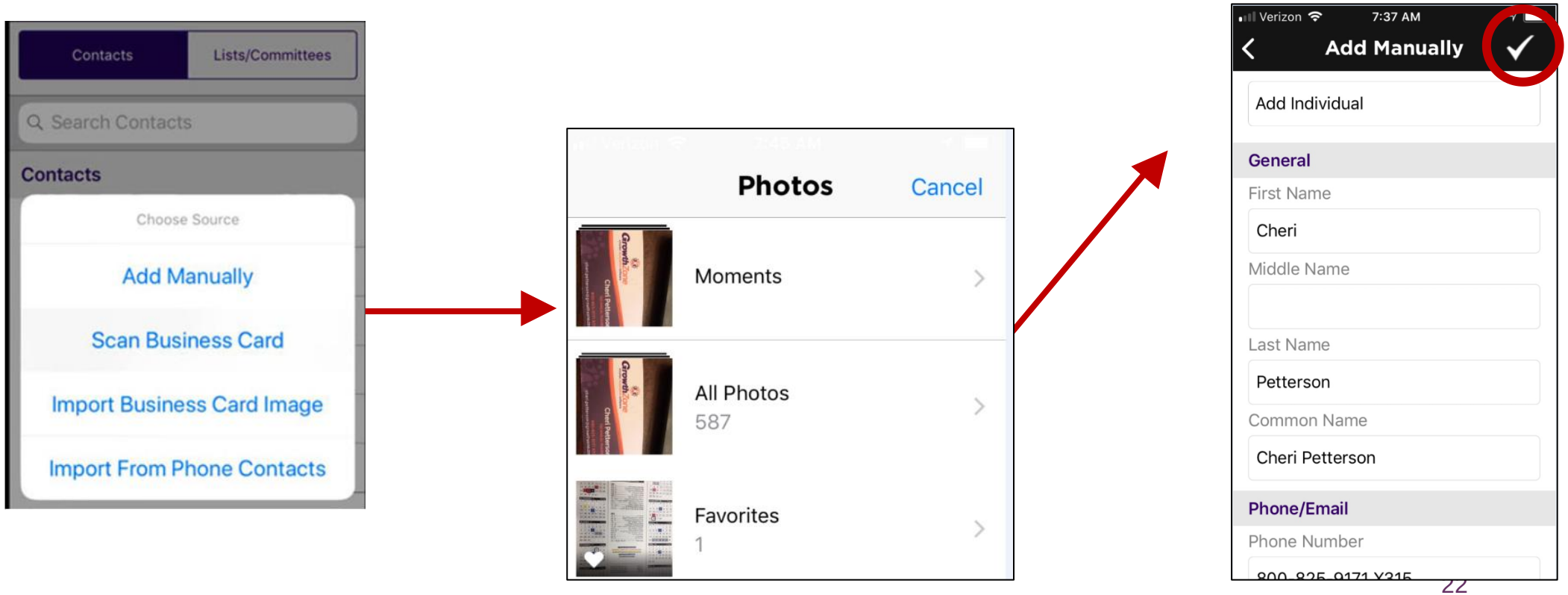




Using the Staff App for Contact Management

Import Business Card Image – this option allows you to use an image of a business card that is already on your phone

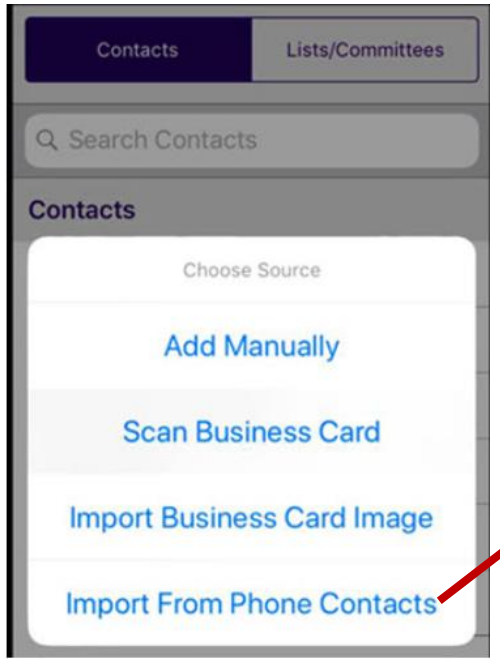
KB: Add Contact by Imported a Business Card Image

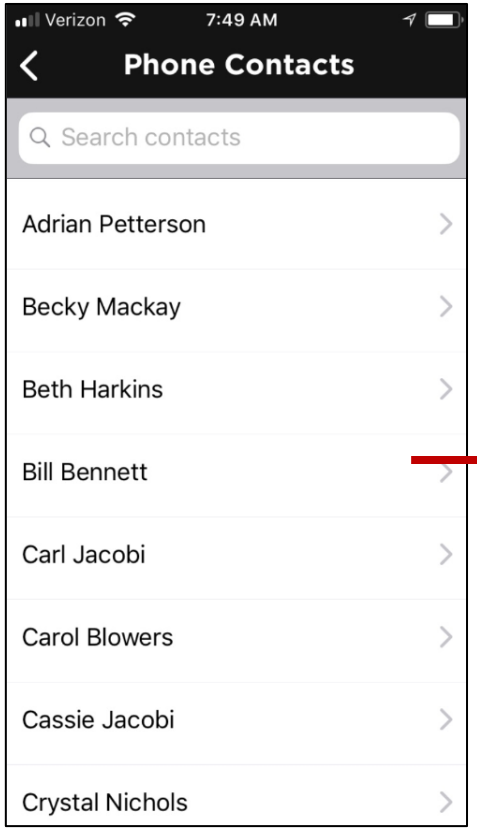


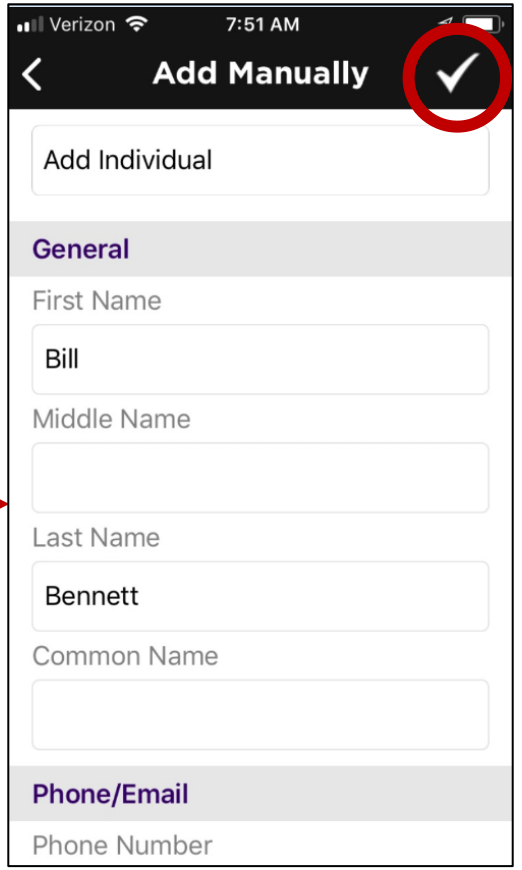
Using the Staff App for Contact Management

Add contact by importing from phone contacts

KB: Add from Phone Contacts

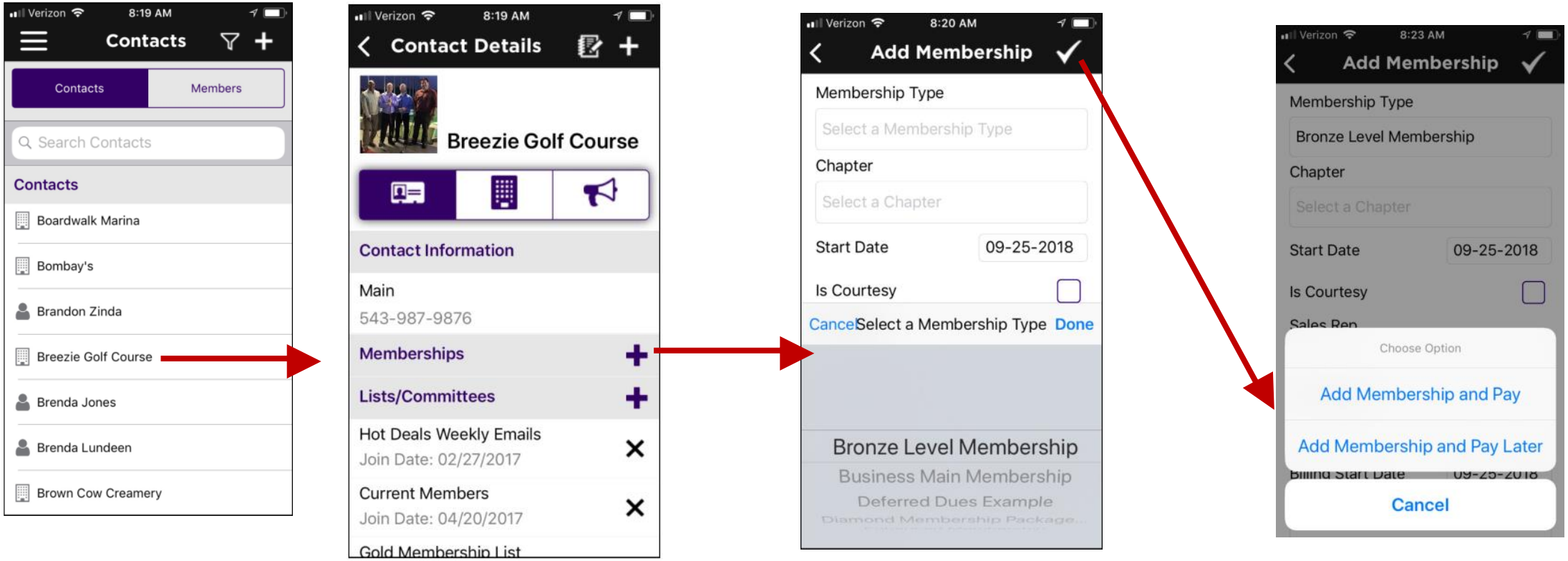






Using the Staff App for Contact Management

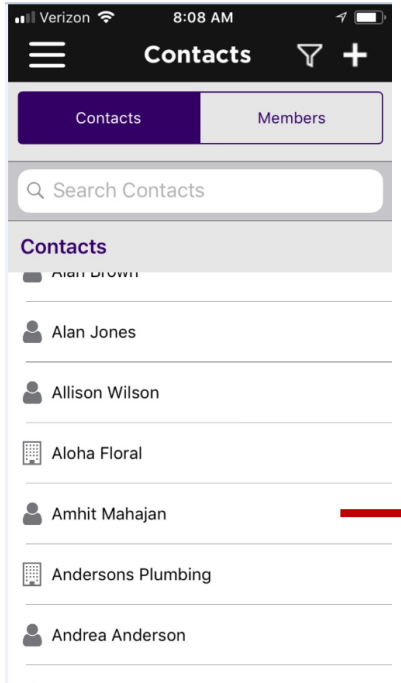
KB: Add A Membership

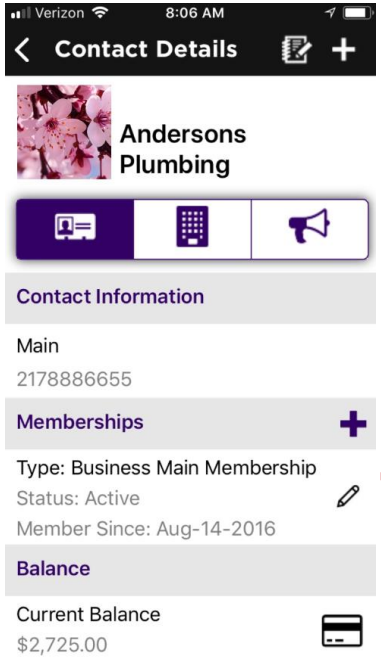


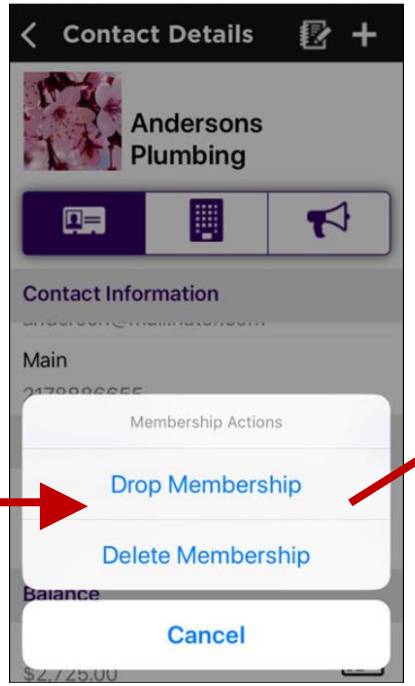
Using the Staff App for Contact Management

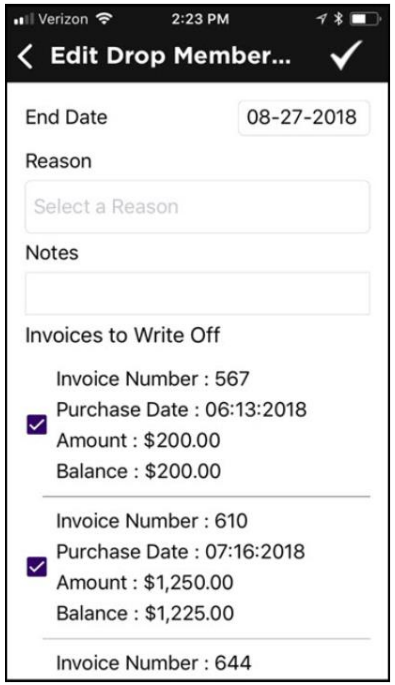
Managing Membership: Using the staff app, you can easily add a membership to a contact, view an existing member's current membership, as well as drop or delete a membership

KB: Drop a Membership





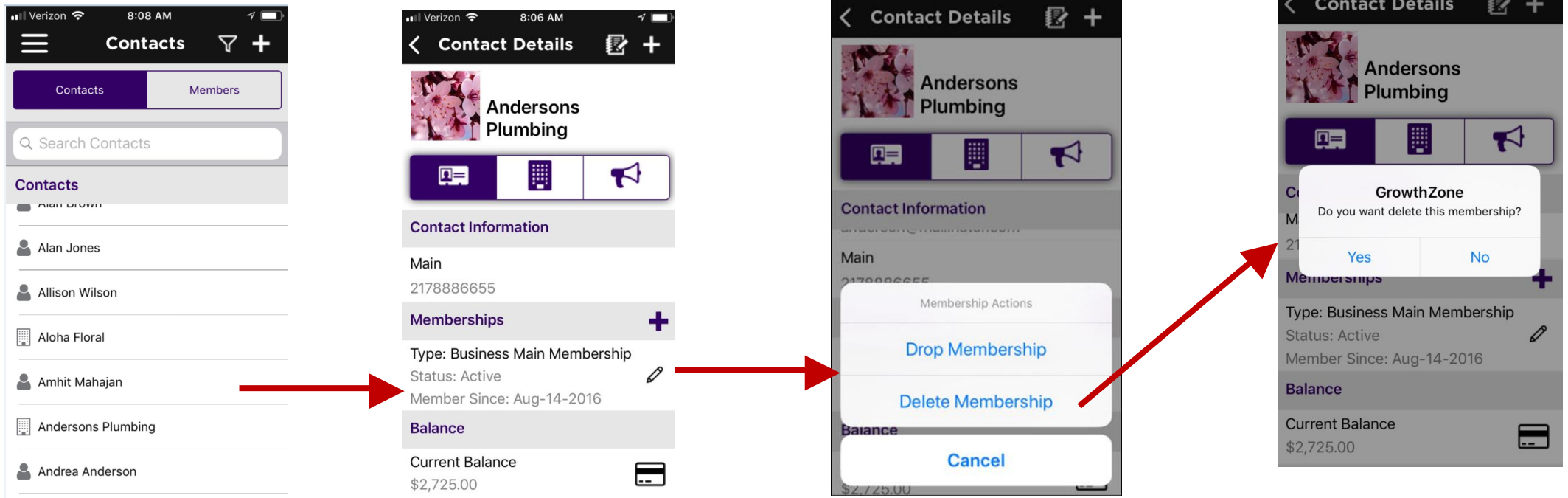




Using the Staff App for Contact Management

Managing Membership: Using the staff app, you can easily add a membership to a contact, view an existing member's current membership, as well as drop or delete a membership

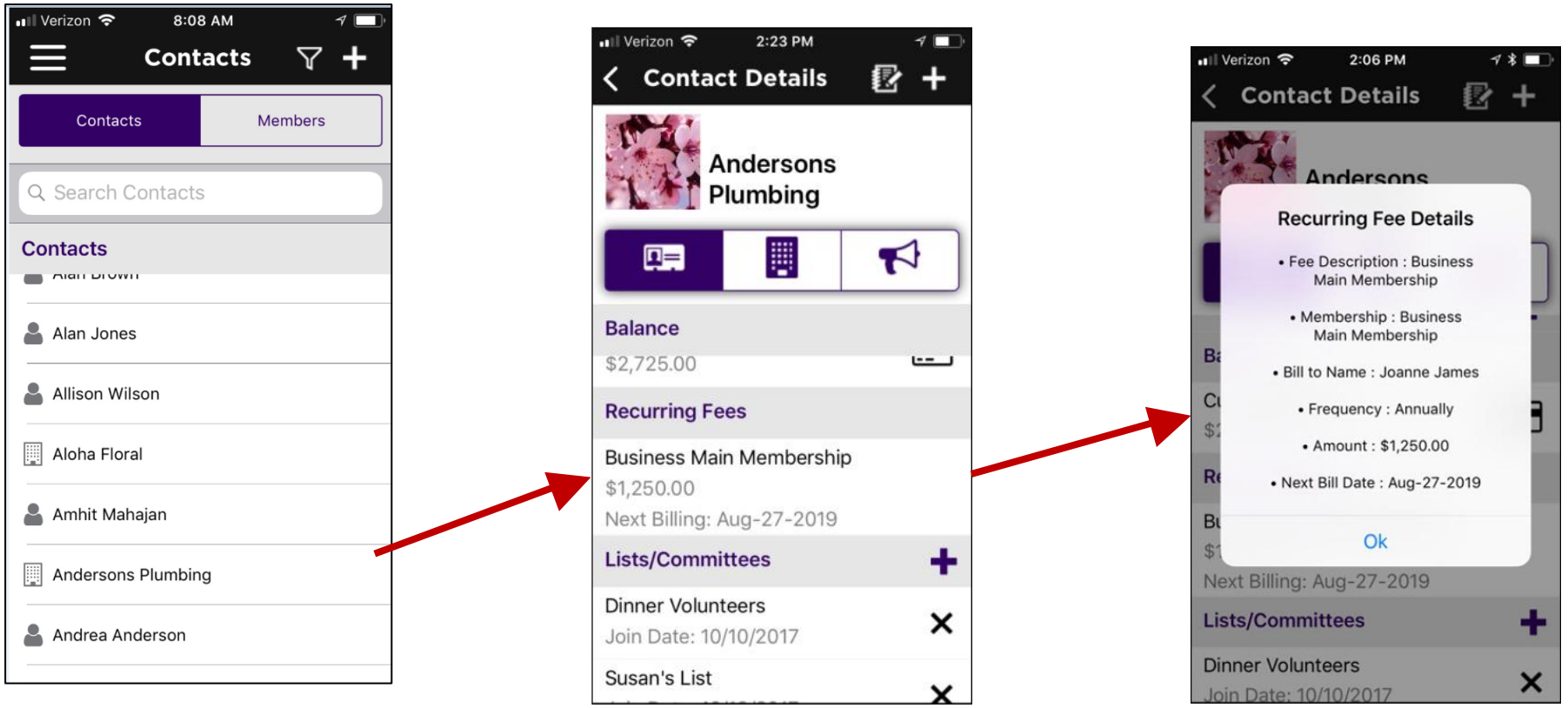
KB: Delete a Membership



Using the Staff App for Contact Management

You can view a contacts recurring fee schedule

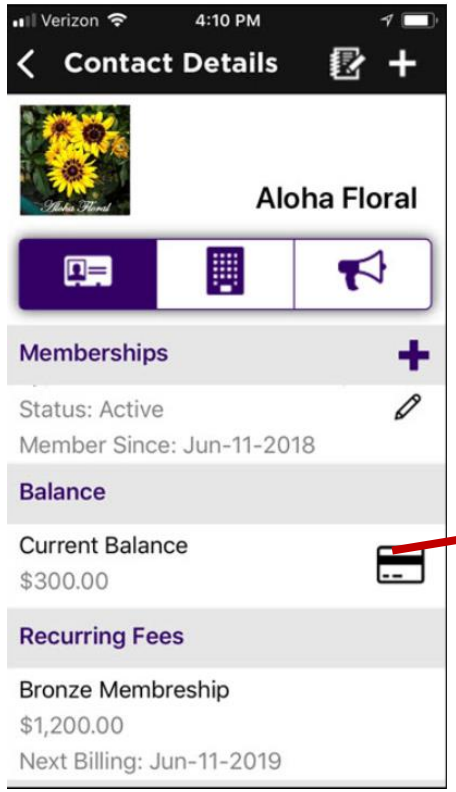
KB: View Recurring Fee Schedule

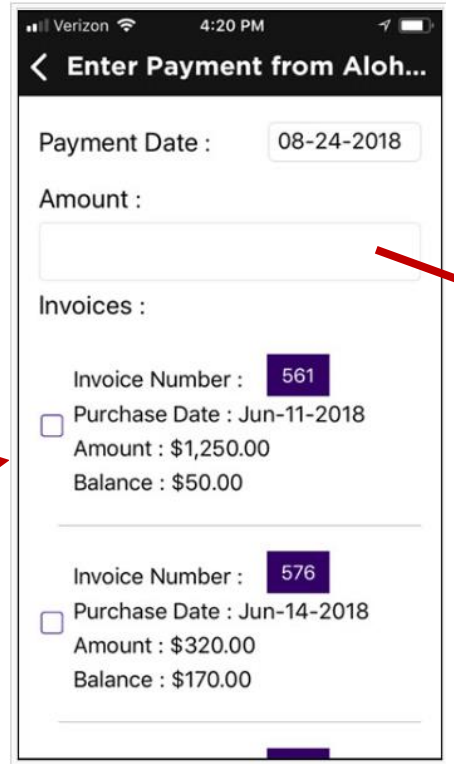


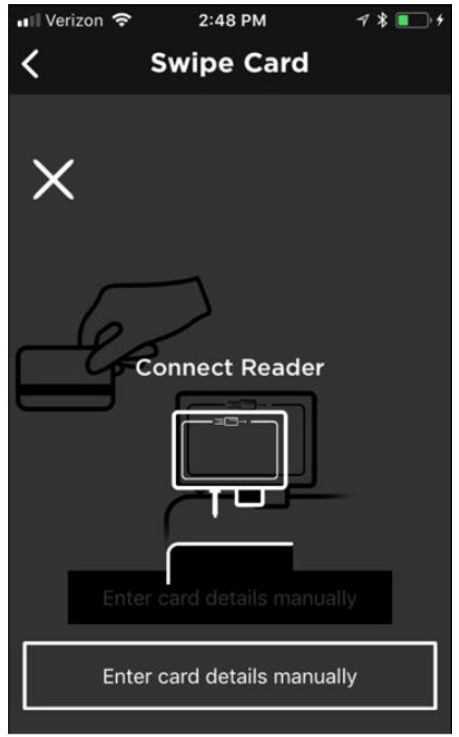
Using the Staff App for Contact Management

View a contact's open invoices, and, if using **GrowthZone Pay** accept credit card payment for open invoices.

KB: View & Manage a Contact's Balance



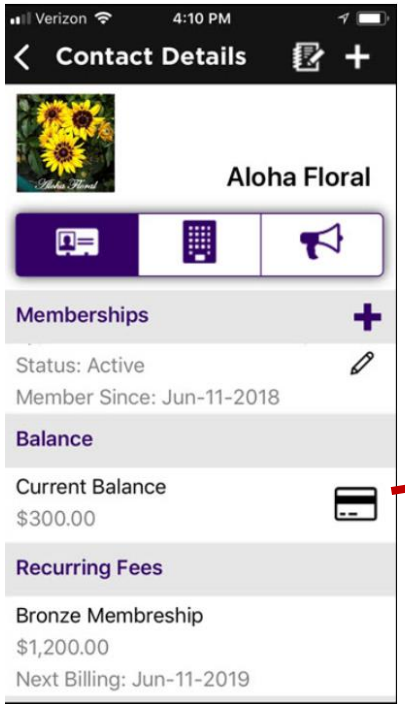


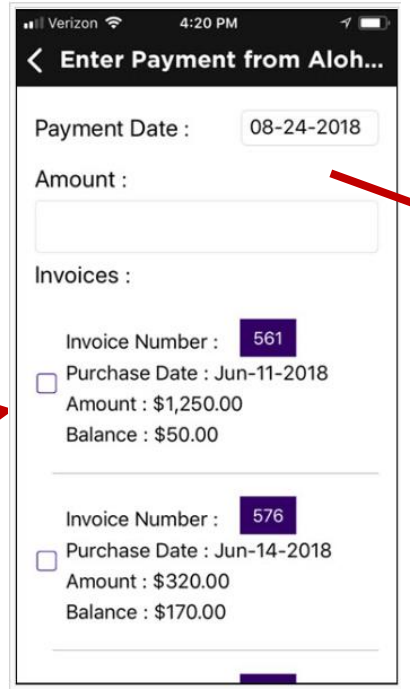


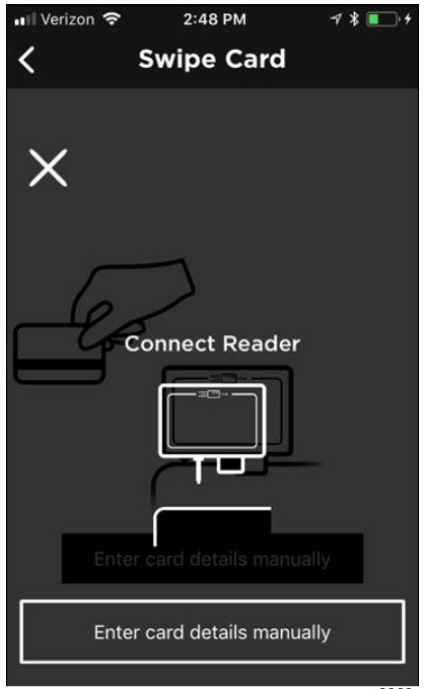
Using the Staff App for Contact Management

If using **GrowthZone Pay** accept credit card payment for open invoices

KB: View & Manage a Contact's Balance



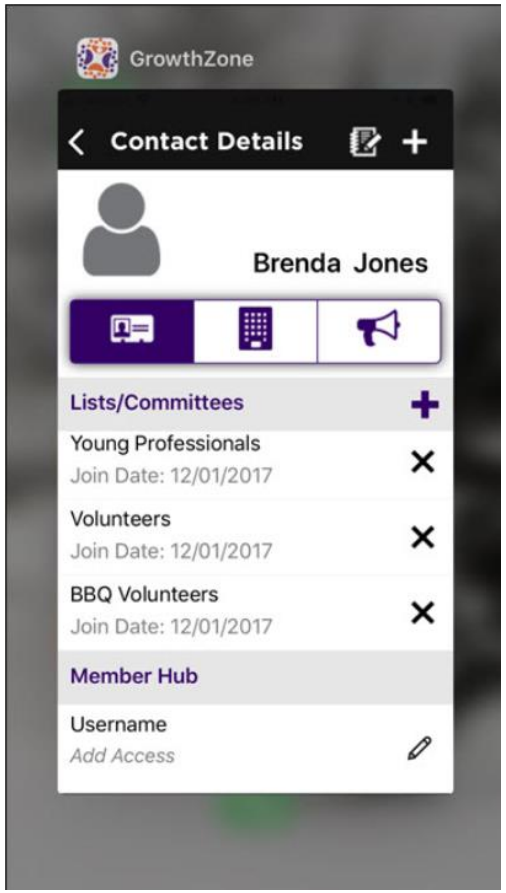




Using the Staff App for Contact Management

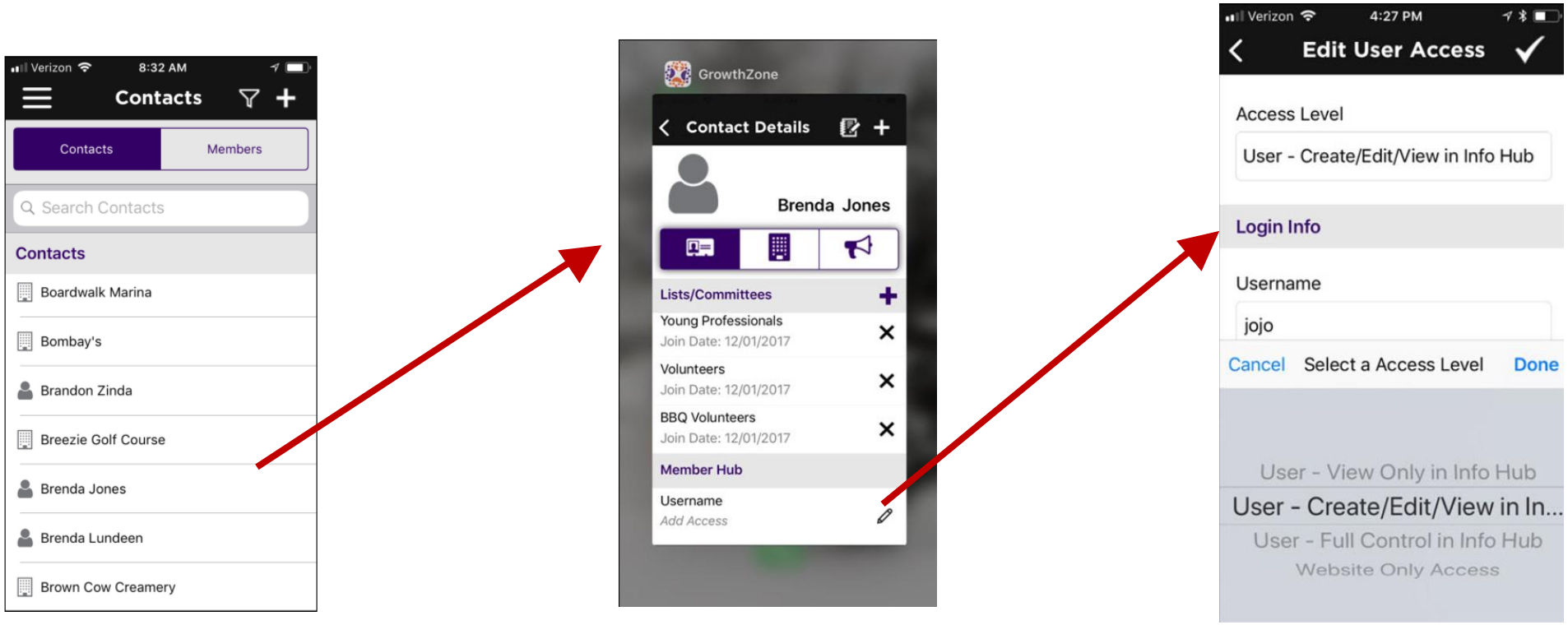
Using the Staff App you can change a user's access level to the Hub, send a user the login instruction email, send a password reset email or manually reset a password

KB: Manage Info Hub Access



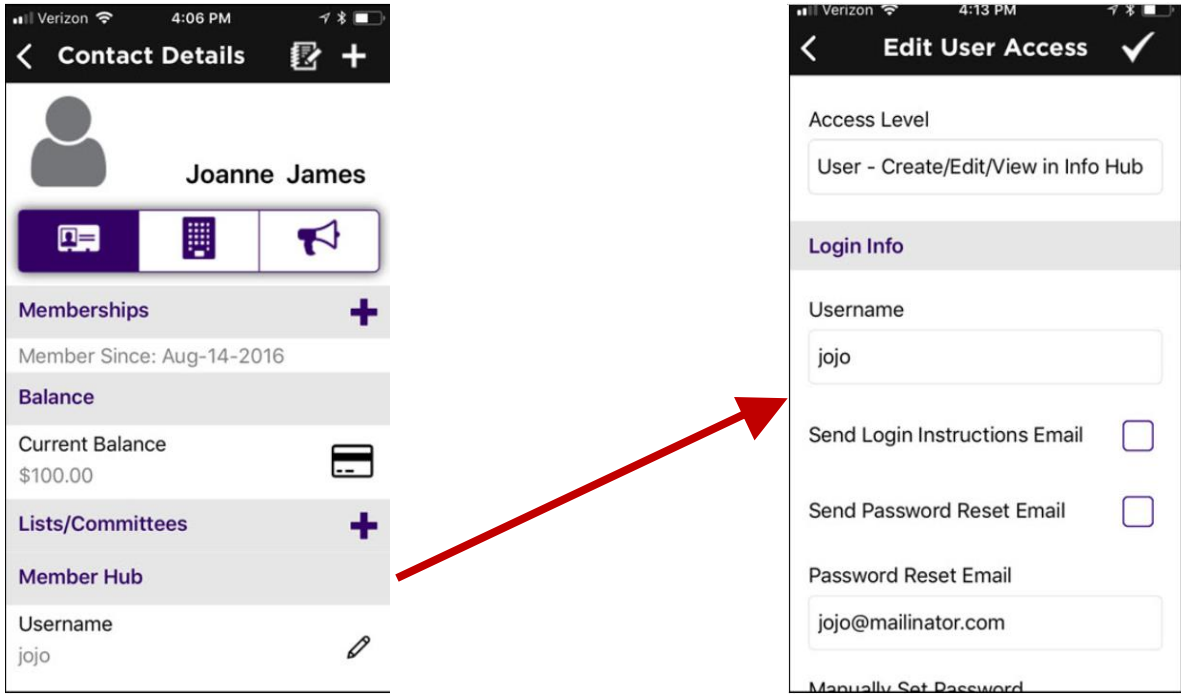
Using the Staff App for Contact Management

If a user does not have access to the Info Hub, you can easily setup access using the Staff App



Using the Staff App for Contact Management

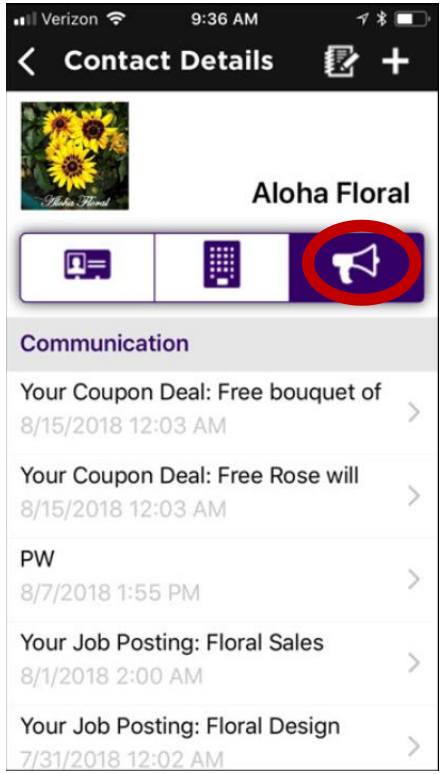
You can easily update a user's access using the staff app, as well as reset their password (either manually or by sending them the reset email)

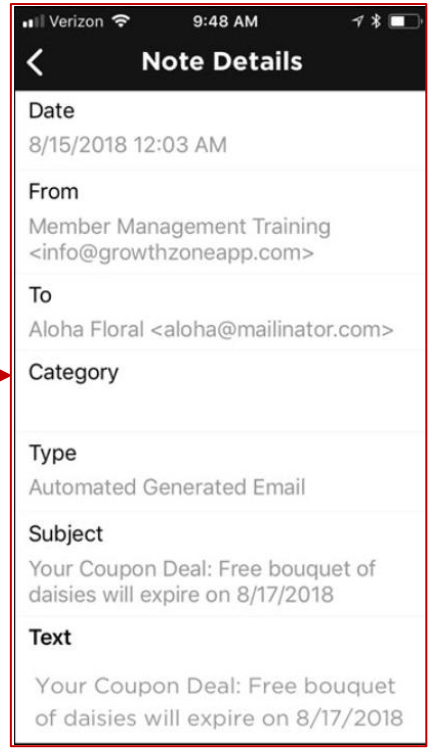


Managing Communications using the Staff App

Using the staff app, you can review communications, log notes, and send emails to your contacts

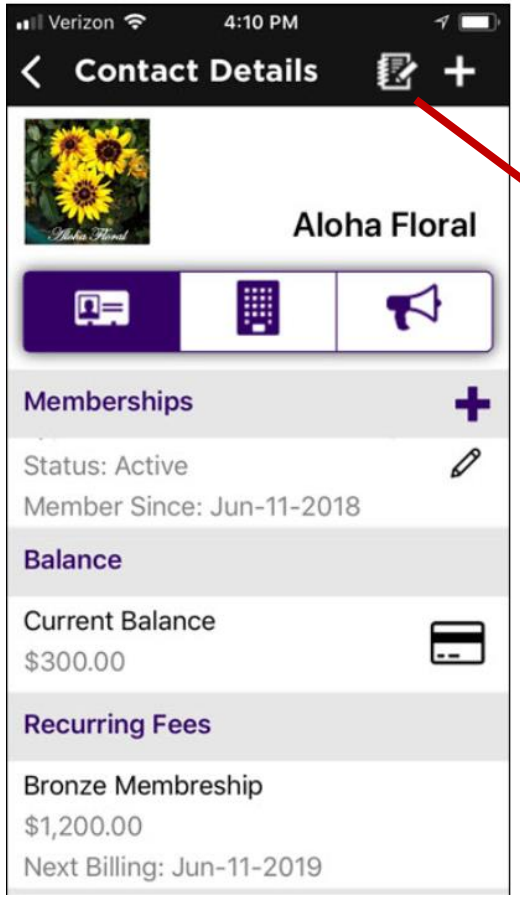
KB: Managing Communications

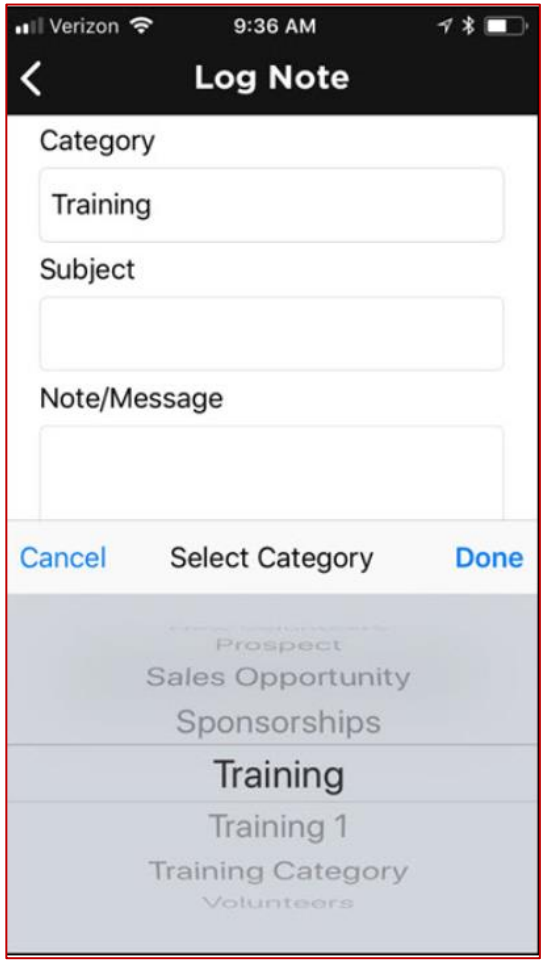




Managing Communications using the Staff App

You can easily log notes

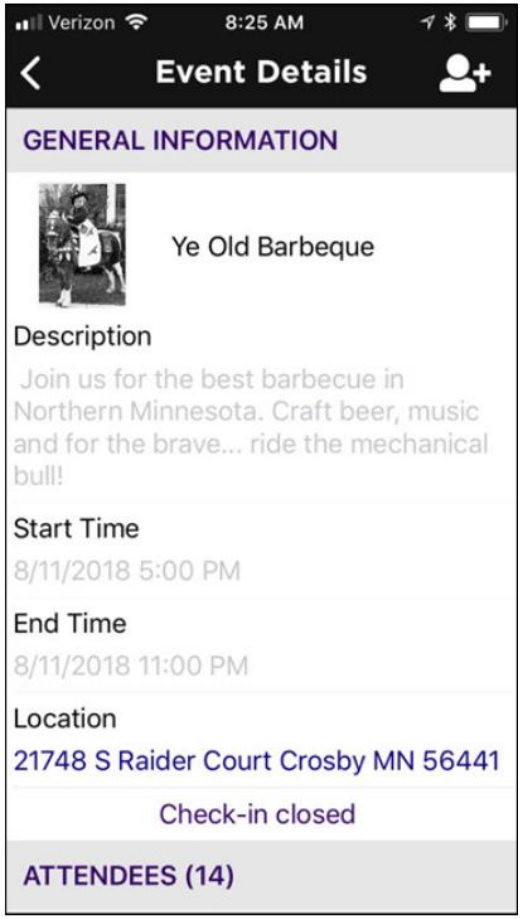




Managing Events with the GrowthZone App

Using the App you can easily add events, review events, check-in attendees, receive payment for events

KB: Managing Events

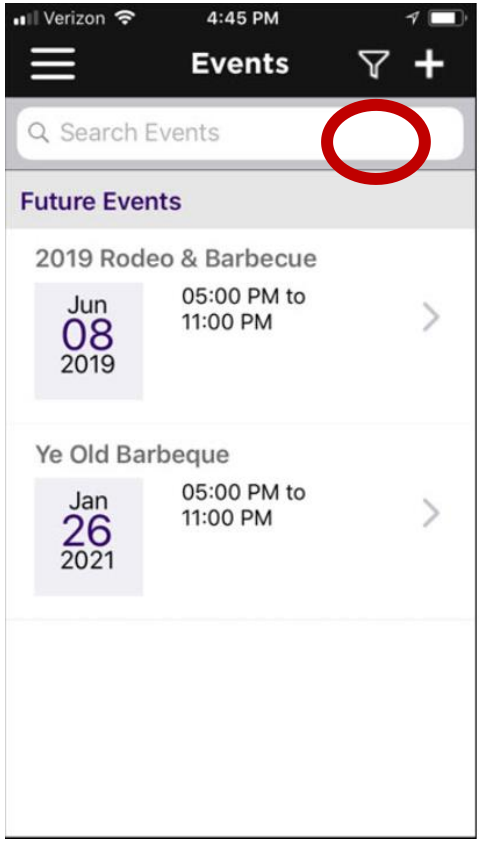


Managing Events with the GrowthZone App

Using the App you can easily review your events. Events can be filtered by:

- ***Status***: *Approved, Cancelled, Declined, Draft, Pending Approval*
- ***Category***: *All categories you have configured for events will be displayed for selection*
- ***Calendar***: *All calendars you have created in the database will be displayed for selection*
- ***Show Only***: *This option allows you to specify specific dates "ranges" i.e. Future, Today, Last Week, etc.*

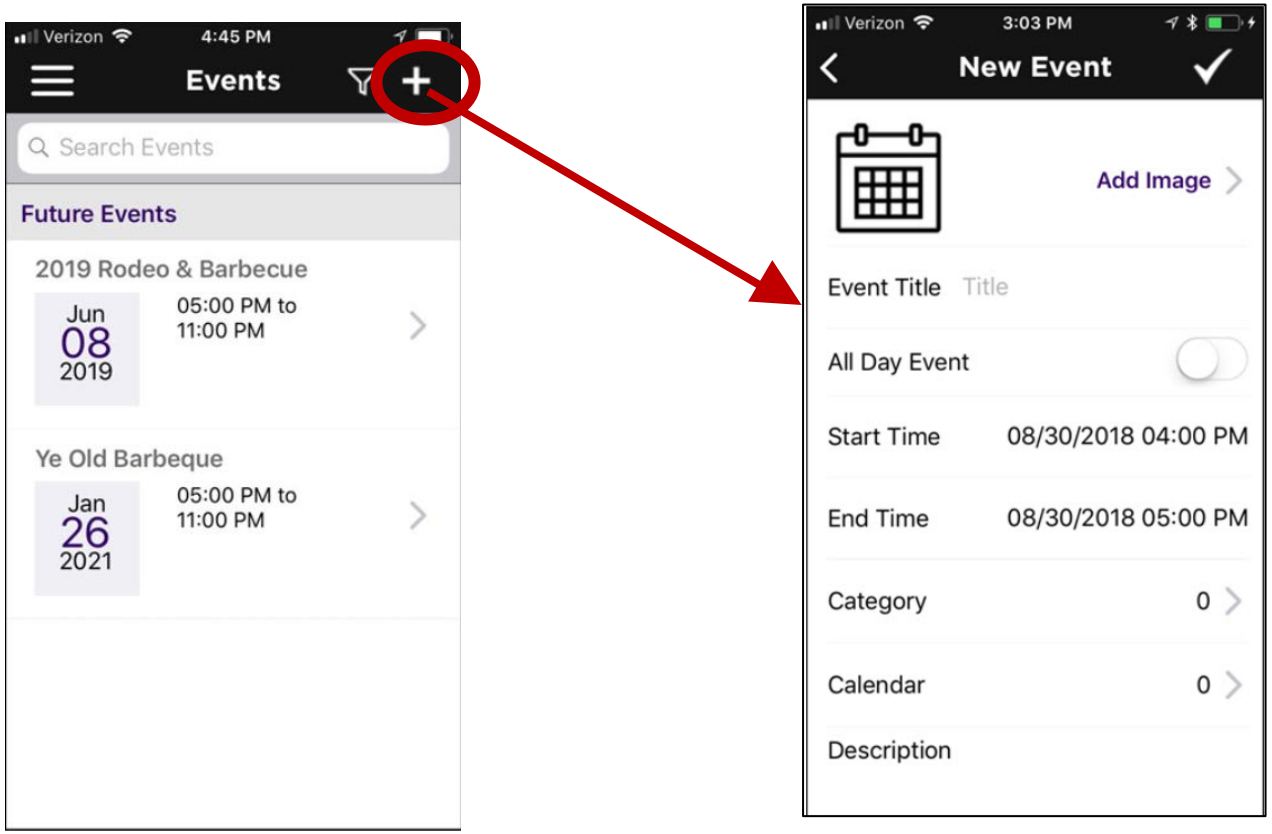
KB: View Events



Managing Events with the GrowthZone App

Using the App you can easily add events

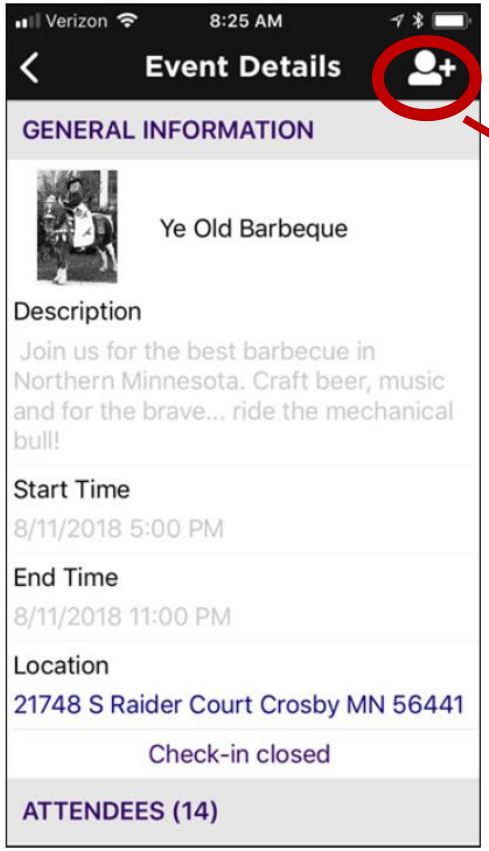
KB: Add an Event

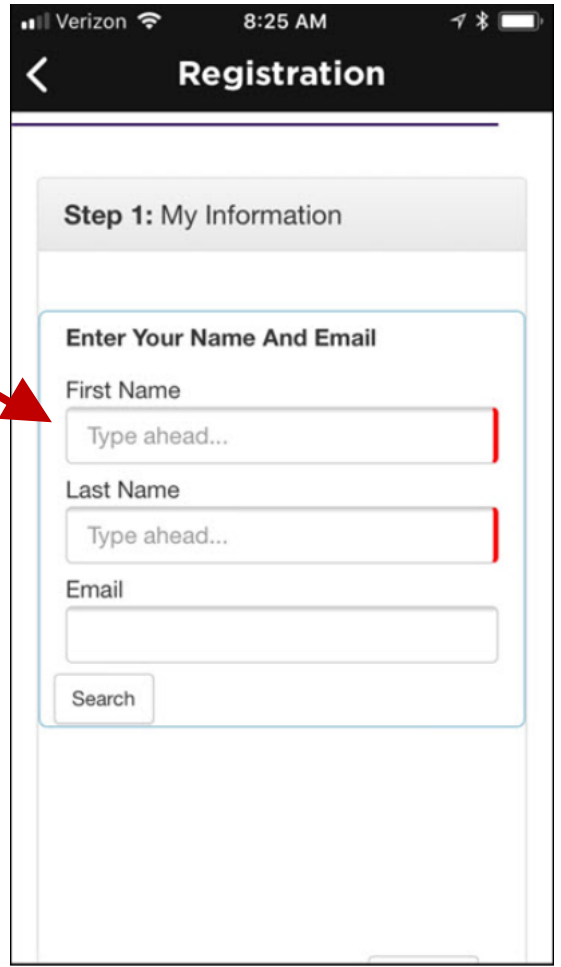


Managing Events with the GrowthZone App

You can easily add registrations to an event…

KB: Add Registrations

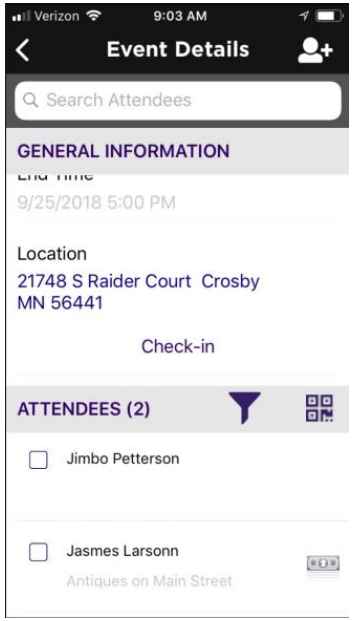


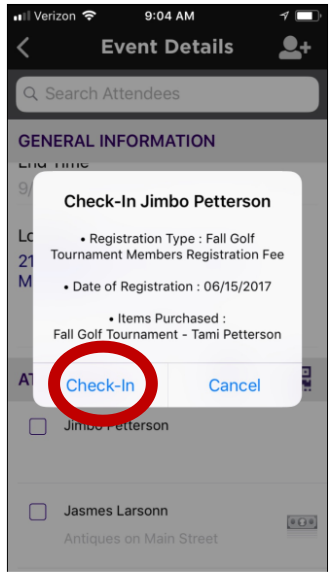


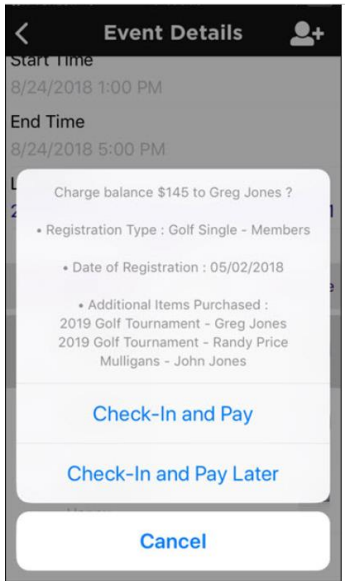
Managing Events with the GrowthZone App

On the day of the event, you can easily check-in attendees either manually or by scanning the QR code in the event confirmation email

KB: Checking in Event Attendees



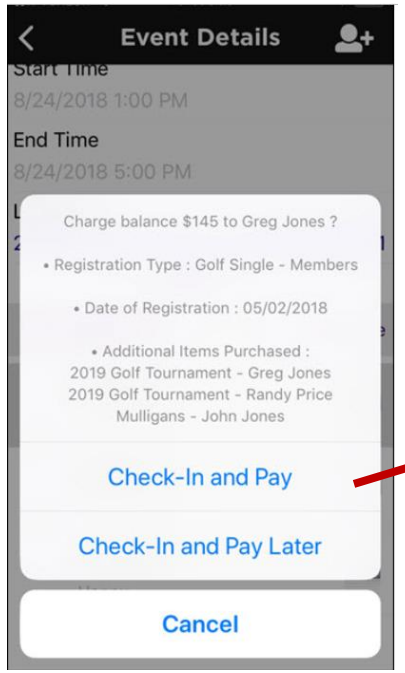


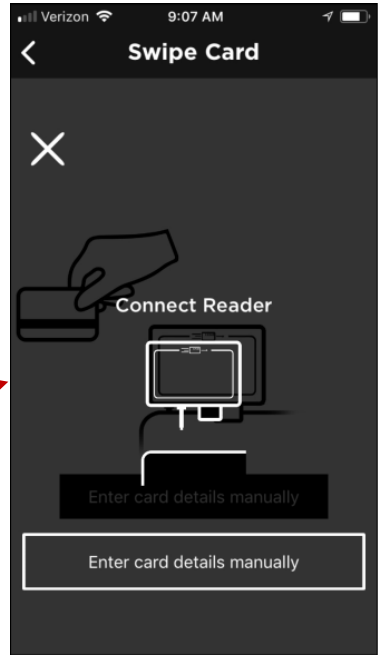


Managing Events with the GrowthZone App

If the attendee has a balance to pay, you can select to check them in and pay later, or if using GrowthZone pay, you can Check-in and Pay

WIKI: Checking in Event Attendees





We recommend the follow readers, available for purchase at posguys.com

Shuttle

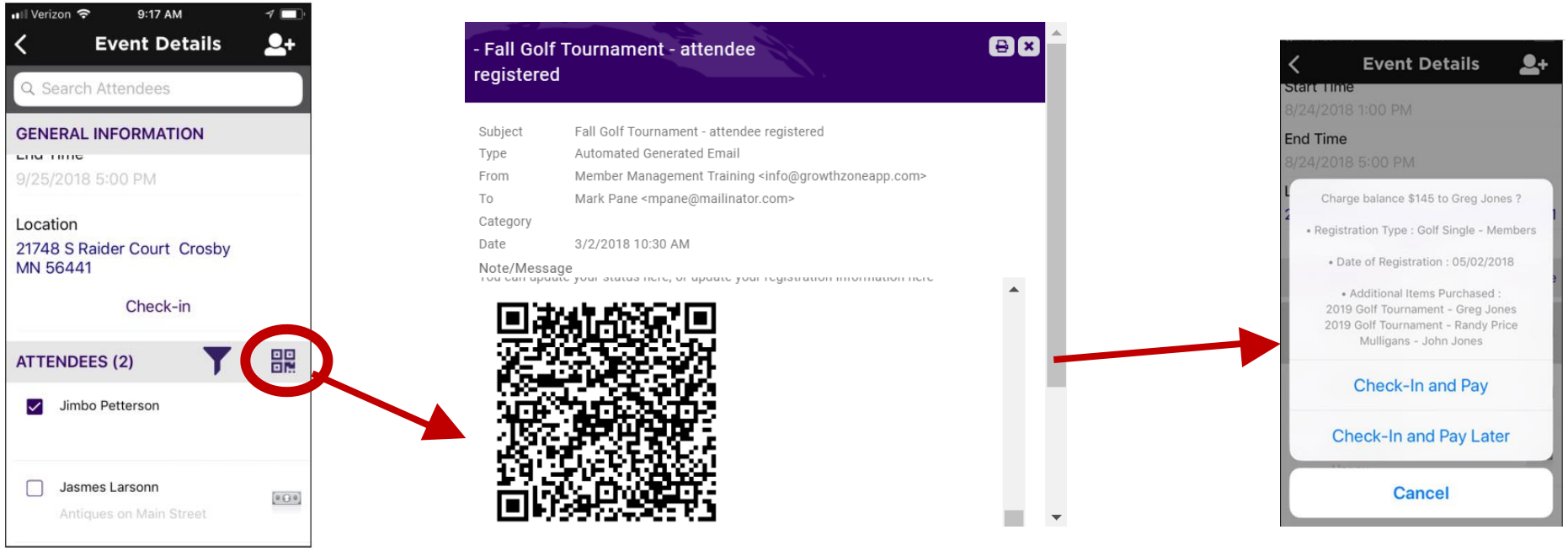
For iPhones without an audio jack:

iMag Pro II

Managing Events with the GrowthZone App

You can choose to check-in attendees using the QR code included in the event confirmation email

KB: Scanning QR Codes

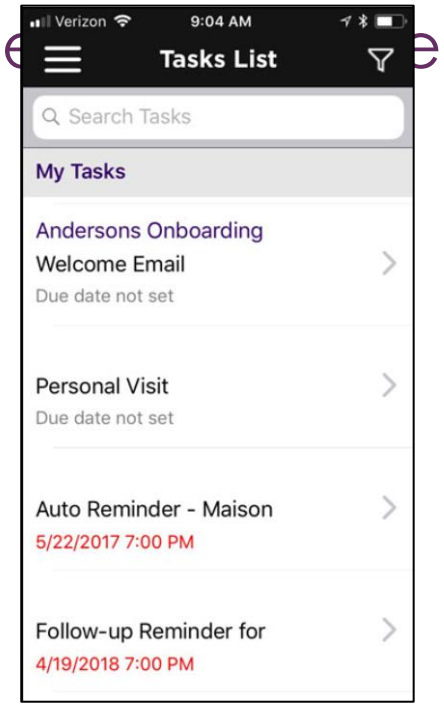


Review and Manage Tasks

Using the staff app, you have the ability to review tasks assigned to you as well as others

Additionally, you can filter the tasks based on whe e overdue, open, or have a due date

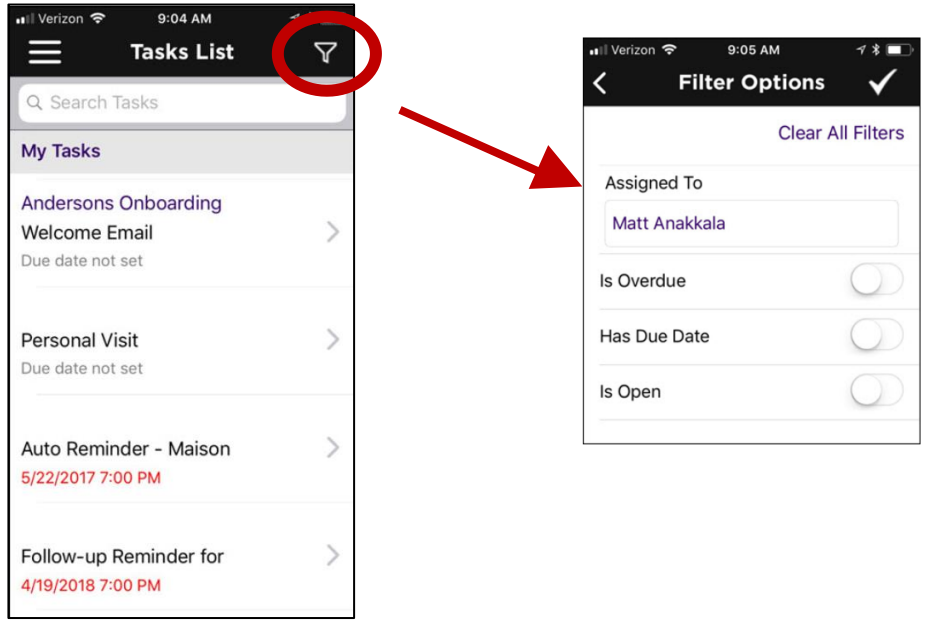
KB: Reviewing & Managing Tasks



Review and ManageTasks

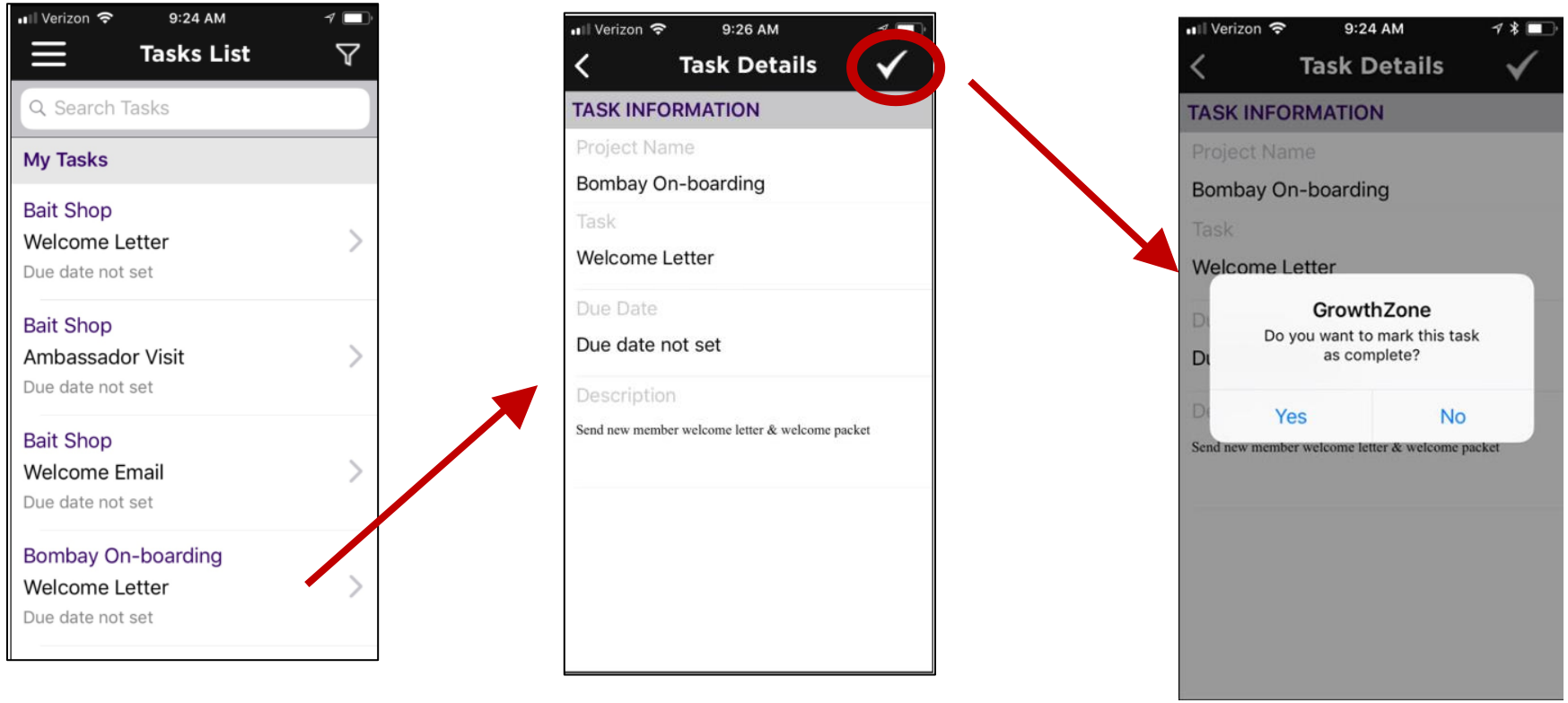
Using the staff app, you have the ability to review tasks assigned to you as well as others. Additionally, you can filter the tasks based on whether they are overdue, open, or have a due date

KB: Reviewing & Managing Tasks



Reviewing and Managing Tasks

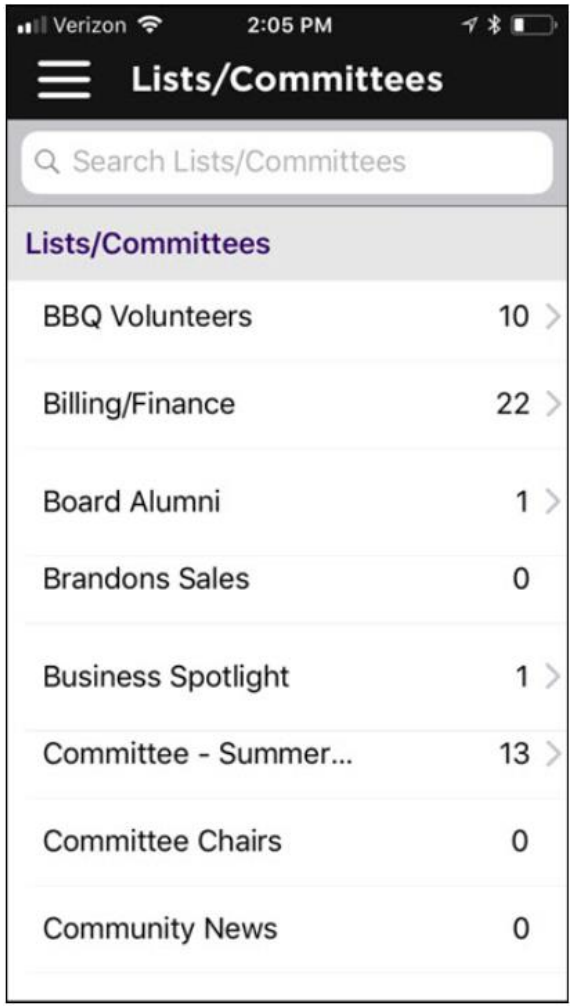
Easily review task details & mark tasks as completed



Managing Lists/Committees

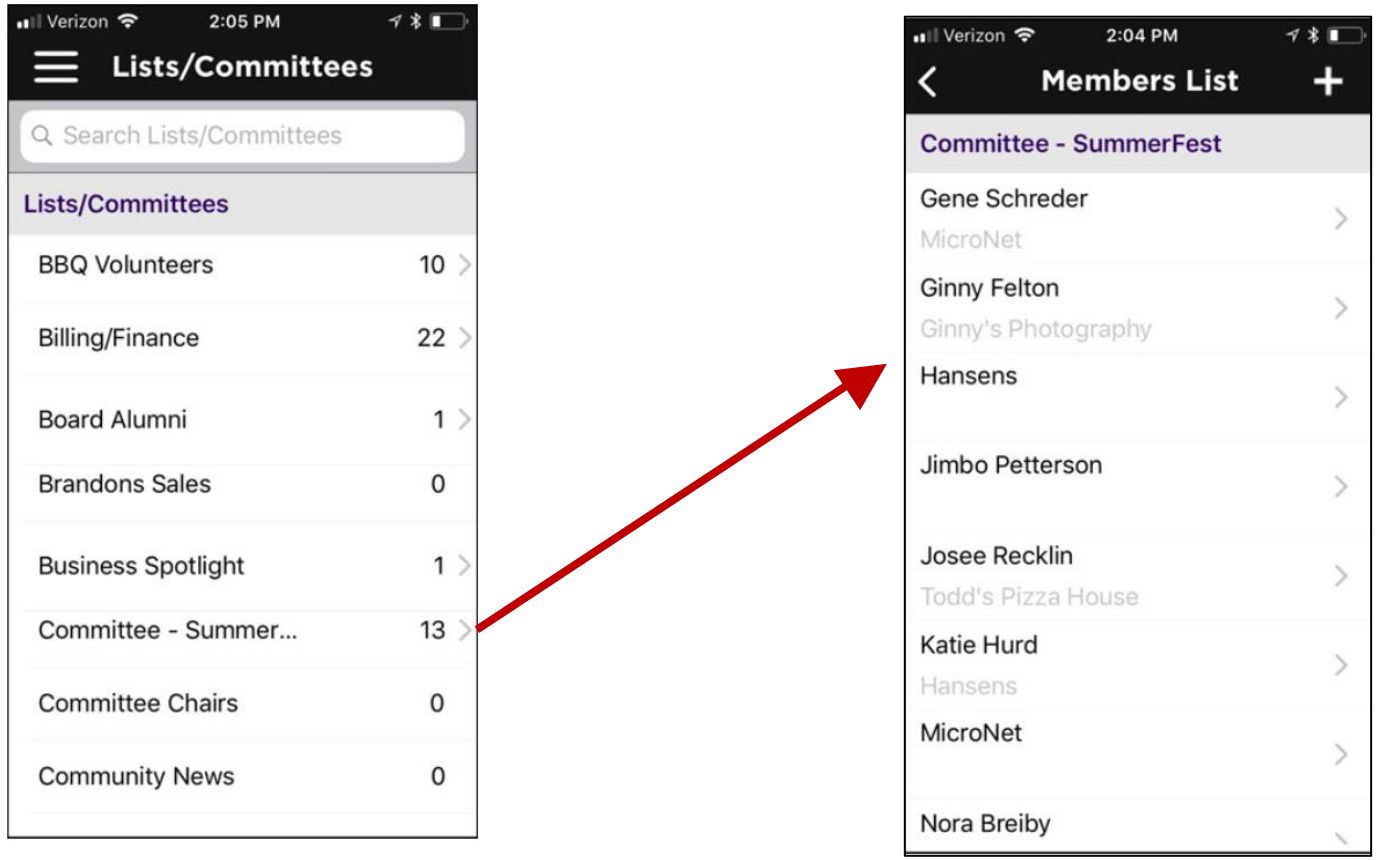
Using the Staff App, you can easily view all of the contacts in a list/committee, add contacts to a list/committee and remove contacts from lists/committees

KB: Managing Lists/Committees



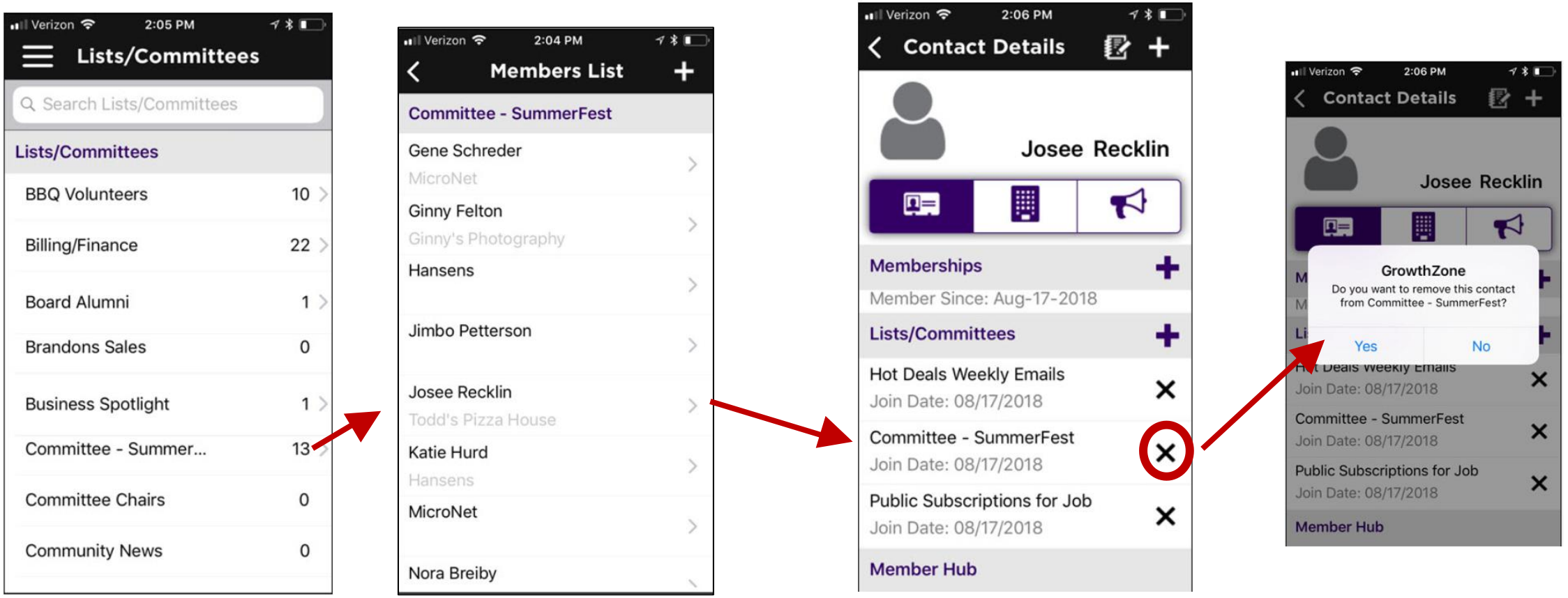
Managing Lists/Committees

View the list/committee roster…



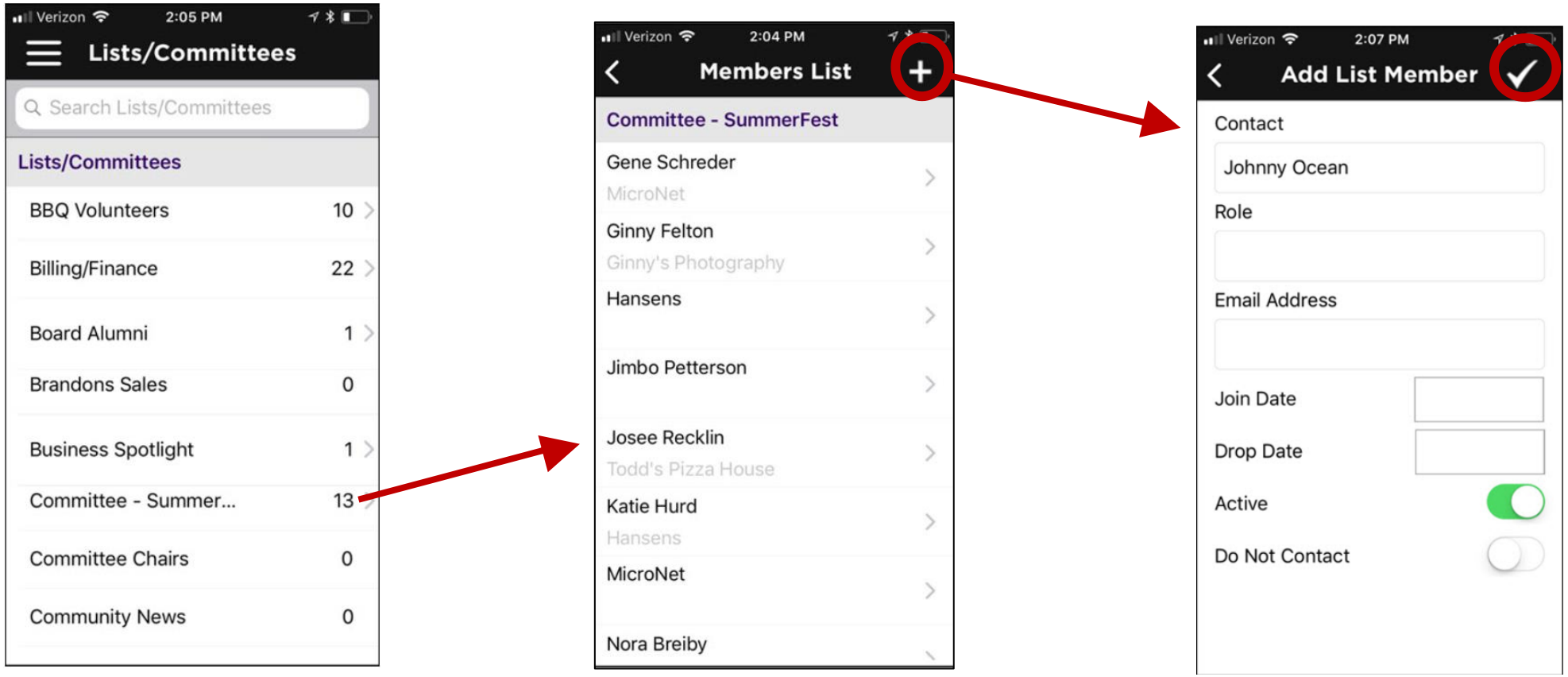
Manage Lists/Committees

Remove Contact from List/Committee Roster…



Managing Lists/Committees

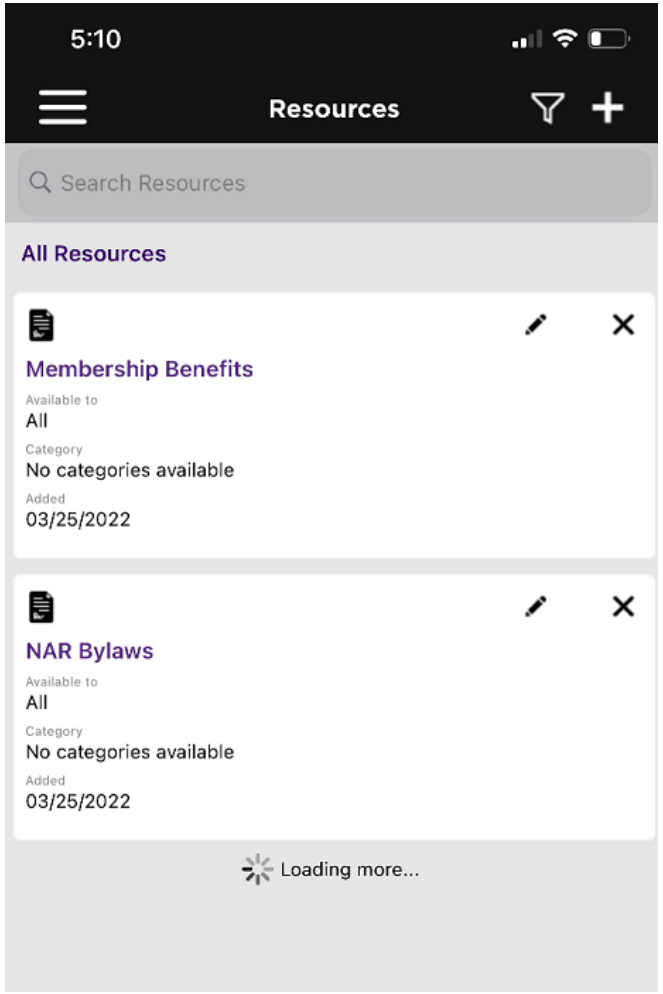
Add a Contact to a List/Committee…



Manage Resources

Using the Staff App you will be able to view and add resources to make available to your members in the Info Hub

KB: Manage Resources with the Staff App



Questions?