

5 Things You Can Do With The Staff App



Agenda

Overview of the Staff App

Downloading the Staff App

Staff App Navigation

5 Common Tasks:

1. *Scan cards to add contacts*
2. *Log notes*
3. *Check in attendees (scan vs manual)*
4. *View and Pay invoices*
5. *View/Complete Tasks*

Staff App Overview

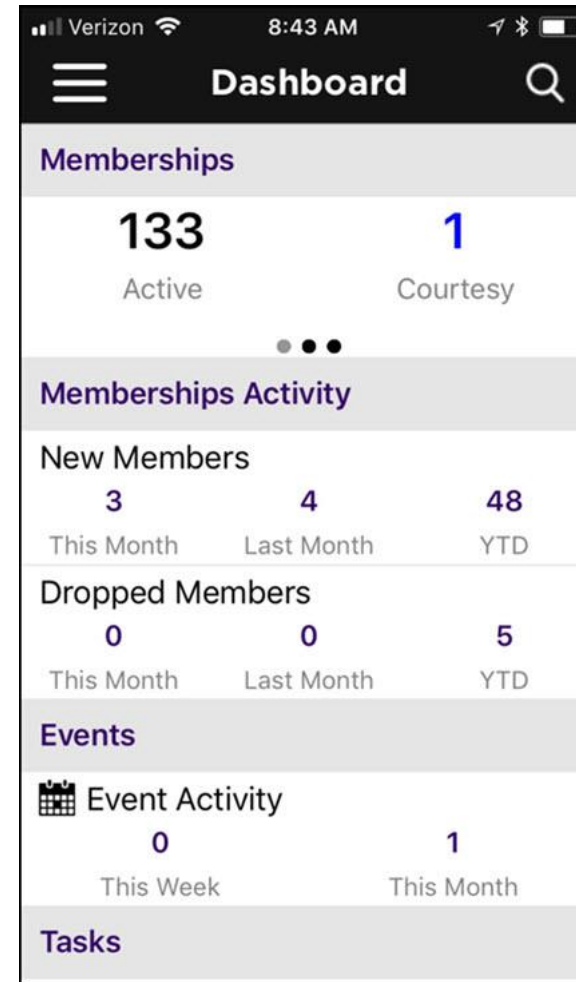
The GrowthZone Staff App is designed to help association/chamber staff accomplish tasks while on the road meeting members or managing an event. It provides great flexibility for staff working with memberships and events, and has the ability to receive payment on site at events. Any work you do in the Staff App, including edits, will be reflected in your database.

Staff App Overview

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.

The GrowthZone Staff App consists of 5 of modules:



Staff App Overview

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.

Staff App Overview

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

Staff App Overview

Lists/Committees

- View members of lists/committees
- Add members to lists/committees
- Remove members from lists/committees

Staff App Overview

Resources

- Ability to view resources
- Ability to add resources

Staff App Overview

Tasks

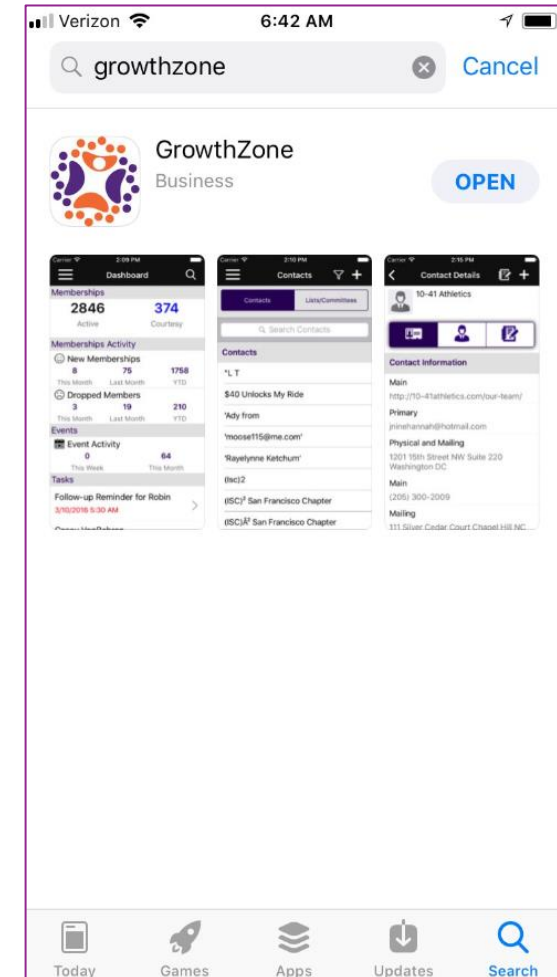
- Ability to view active tasks that are assigned to you
- Ability to mark tasks as completed

Download the Staff App

The Staff App is available for both [Apple](#) and [Android](#) devices

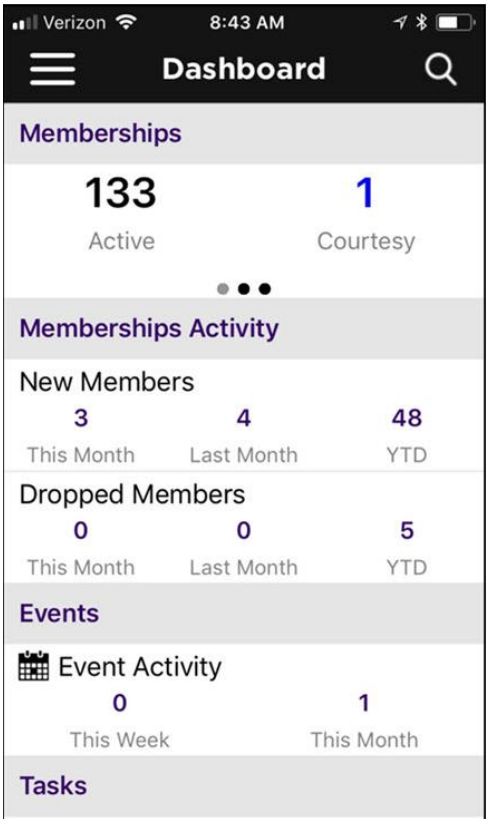
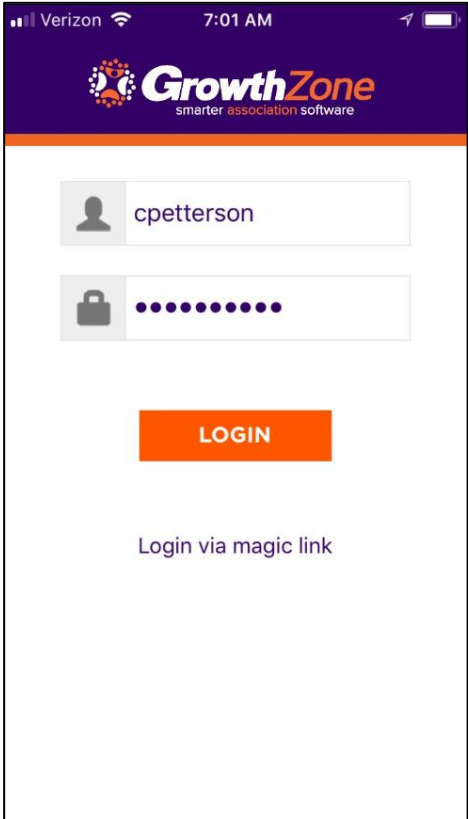
Compatibility:

- *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

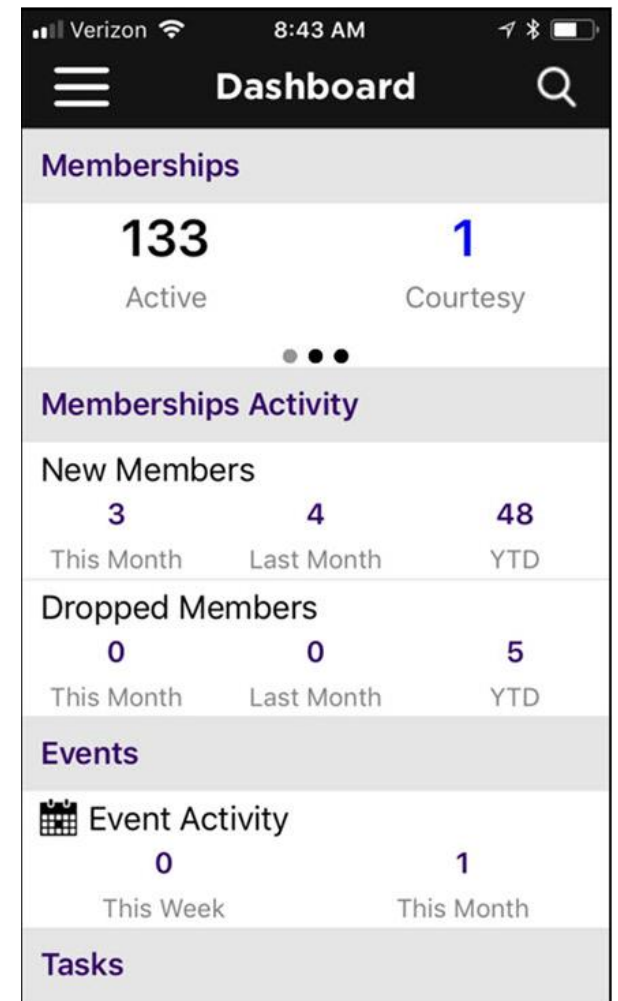


Staff App Navigation

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

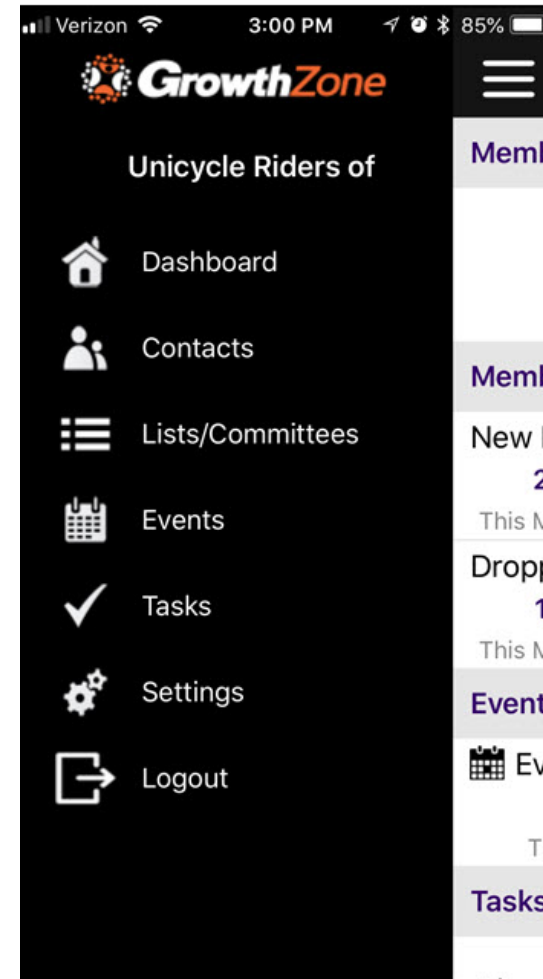
The Dashboard provides an at a glance understanding of your Memberships, Events, Tasks and Lists and Committees

KB: [Staff App Navigation](#)



Staff App Navigation

Click the  to view the left-hand navigation panel

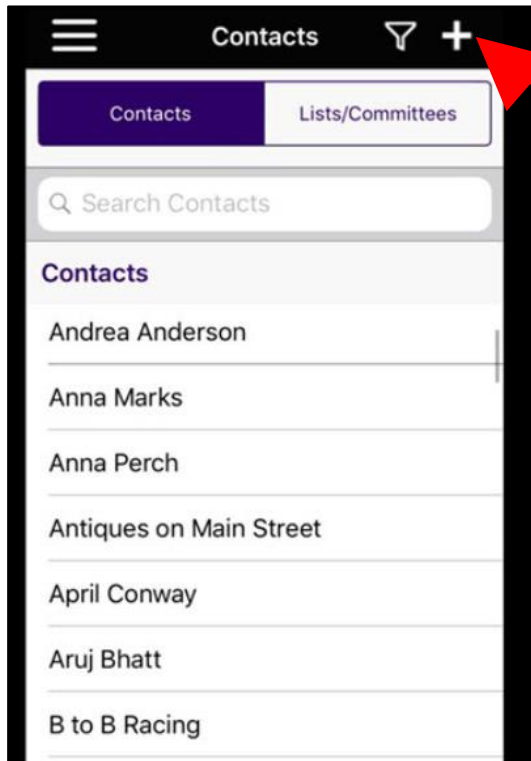


5 Common Tasks



Contacts:

Scan business cards to add contacts

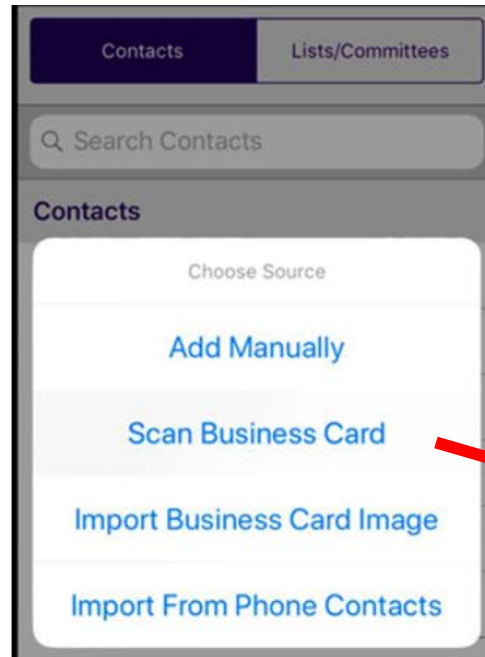


You can easily add new contacts to the database by just [scanning their business card](#).

- Select Contacts from the app menu.
- Click the **+** icon.
- Click Scan Business Card. The camera on your phone will be enabled.
- Take photo of the business card.
- Click Use Photo or Retake as necessary. When Use Photo is selected, the app will process the photo and populate the contact information in the appropriate fields.
- Click the **✓** icon to save the new contact.

Contacts:

Scan business cards to add contacts



Verizon 7:37 AM

Add Manually

Add Individual

General

First Name
Cheri

Middle Name

Last Name
Petterson

Common Name
Cheri Petterson


Phone/Email

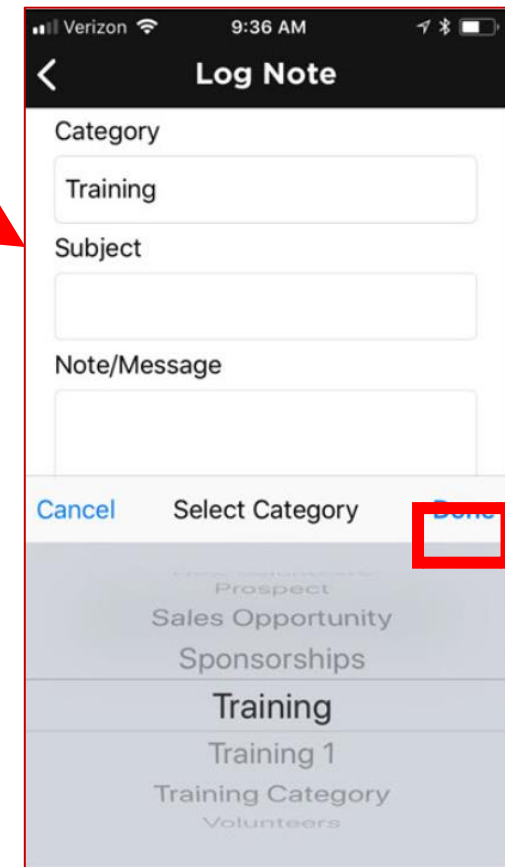
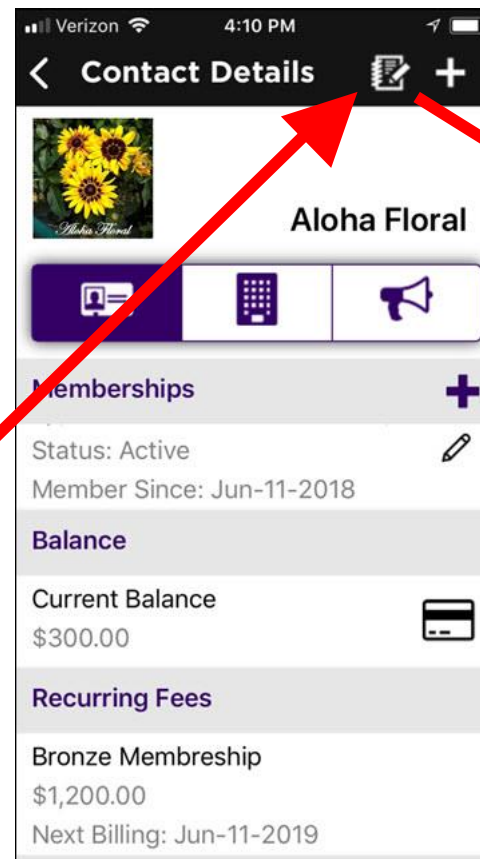
Phone Number
800-825-9171 X315

Contacts:

Add Notes to Contacts

You can [add notes to contacts](#) to log visits, conversations, phone calls, etc.



- Select Contacts from the app menu.
 - Select the Contact.
 - Click the  icon.
- Select a category, and enter a subject and the note.
 - Click Done.



Events:

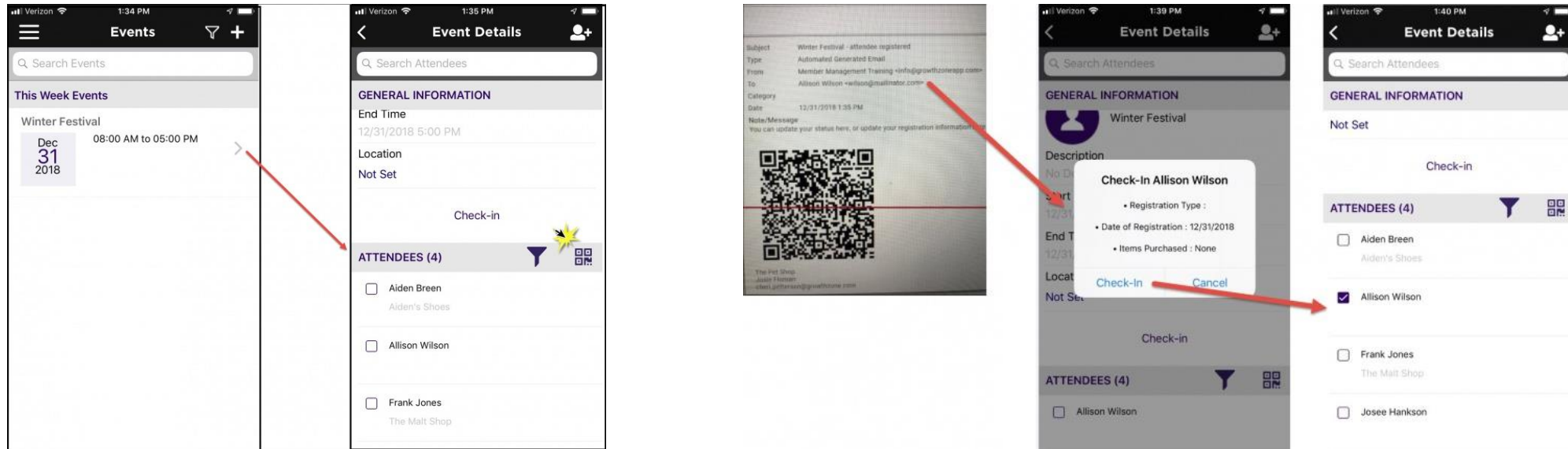
Check In Attendees: Scan QR Codes

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

- Click **Events** in the left-hand navigation panel.
- Click the filter icon  to select Today as your filter for events.
- Select the desired event from the list.
- In the Attendees section, click the Scan QR Code link: 
- Align your phone with the QR code. The QR code will be scanned, and the attendee will automatically be marked as “Attended” for the event.

Events:

Check In Attendees: Scan QR Codes




KB: [Checking in Event Attendees](#)

Events:

Check In Attendees: Manual

On the day of the event, you can also check-in attendees by using the manual check in method.

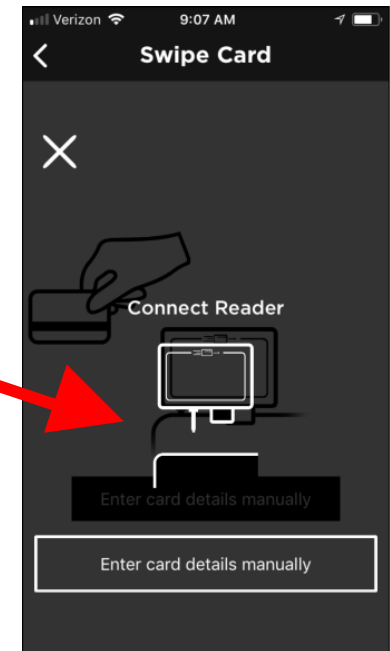
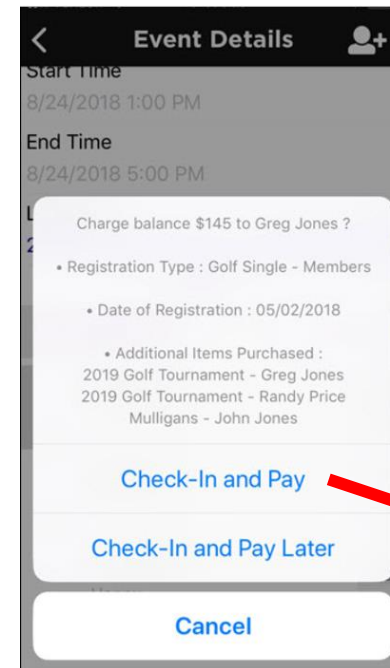
- Click **Events** in the left-hand navigation panel.
- Click the filter icon  to select Today as your filter for events.
- Select the desired event from the list.
- In the Attendees section, click the checkbox next to the attendee you wish to check in.
- If needed, select your preferred action: Check-In and Pay or Check-in and Pay Later.

Events:

Check In Attendees: Manual

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.

KB: [Checking in Event Attendees](#)

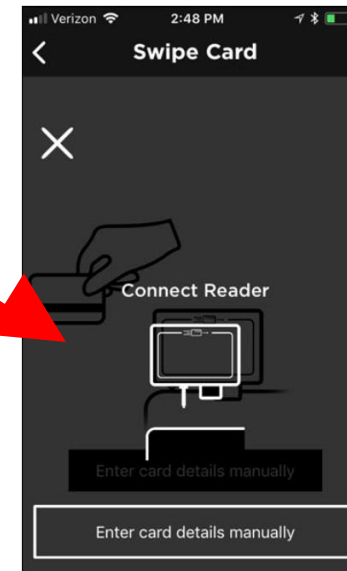
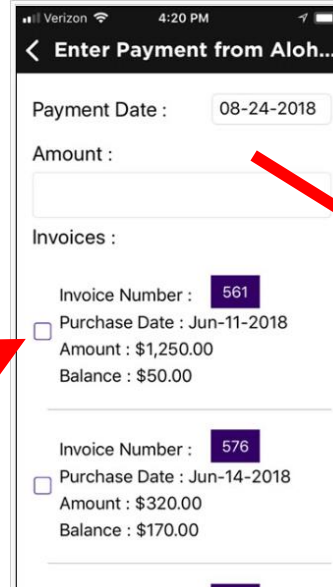
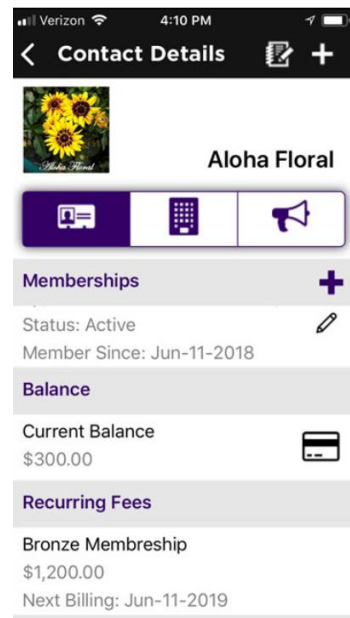


Contacts/Events:

Review and Pay Invoices

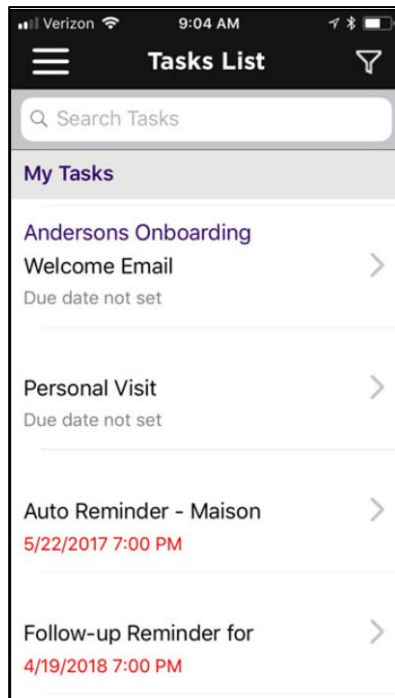
View a contact's open invoices, and, if using [GrowthZone Pay](#) accept credit card payment for open invoices.

KB: [View & Manage a Contact's Balance](#)



Tasks:

Review and Manage Tasks



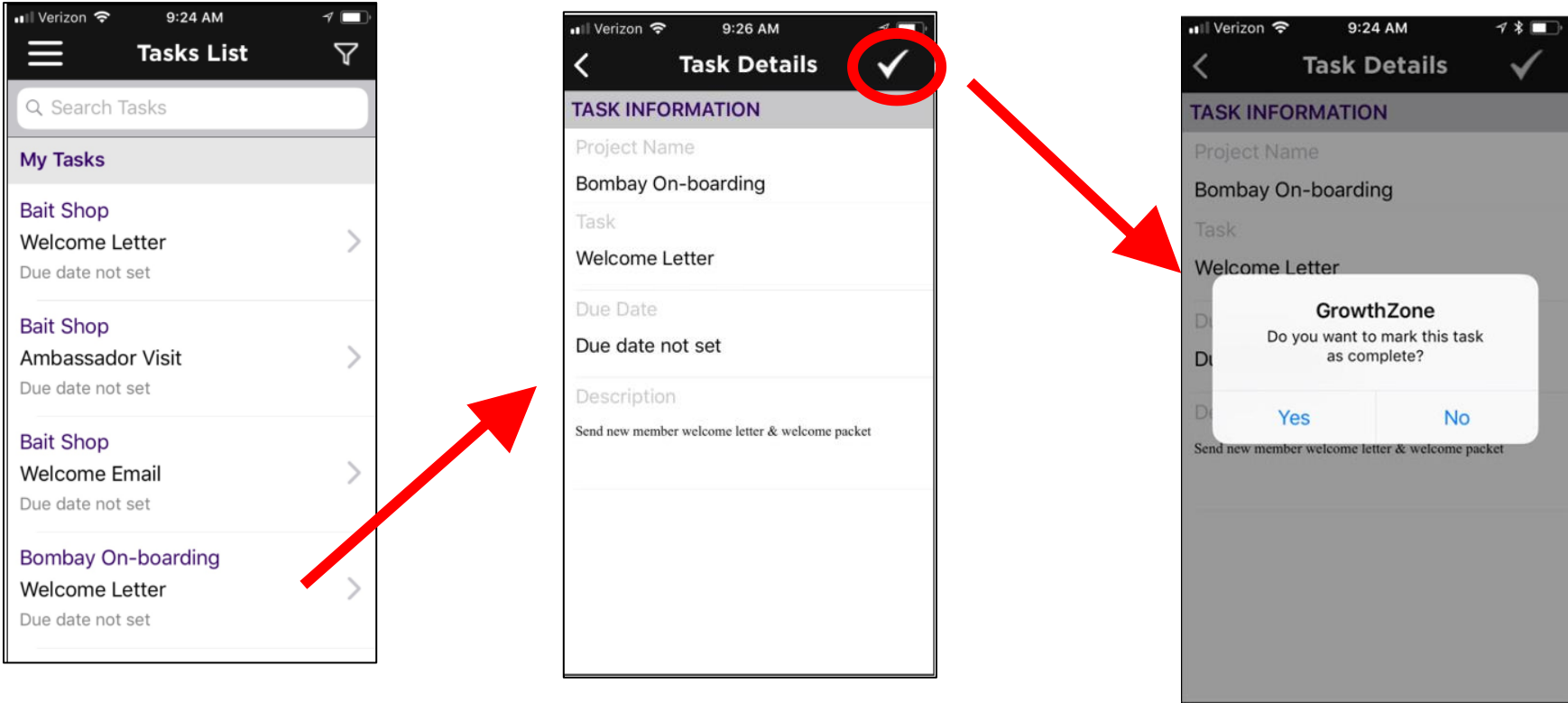
Using the staff app, you have the ability to review tasks assigned to you as well as others. Additionally, you can filter the tasks based on whether they are overdue, open, or have a due date

KB: [Reviewing & Managing Tasks](#)

Tasks:

Review and Manage Tasks

Easily review task details & mark tasks as completed



Questions?

Training and Support

Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Documentation:

[GrowthZone Knowledge Base »](#)

Training Calendar:

[View Training Event Calendar »](#)

Live Chat:

[GrowthZone Support Portal \(chat on far right\) »](#)