GrowthZone - Working with the Staff App







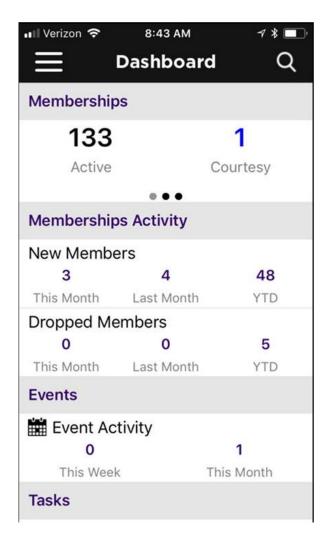
- How to Navigate the Staff App
- How to Manage Contacts
- How to Manage Events
- How to Manage Lists/Committees
- How to Manage Tasks

Overview

Smarter association software

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 4 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

Lists/Committees

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

Tasks

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

Overview



Download the Staff App

The Staff App is available for both Apple and Android devices

Search for "GrowthZone" in the app store

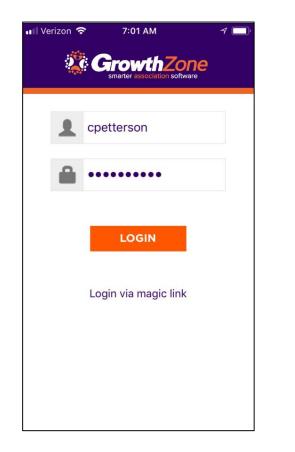
Compatibility:

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

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



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

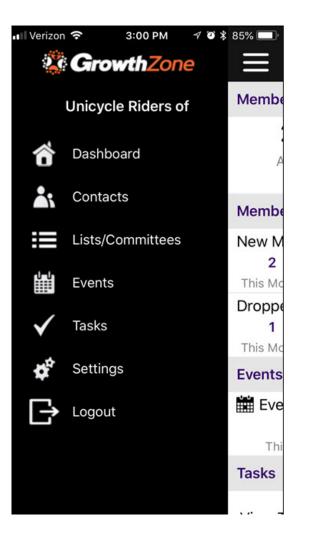
The Dashboard provides an at a glance understanding of your Memberships, Events, Tasks and Lists and Committees

WIKI: Staff App Navigation

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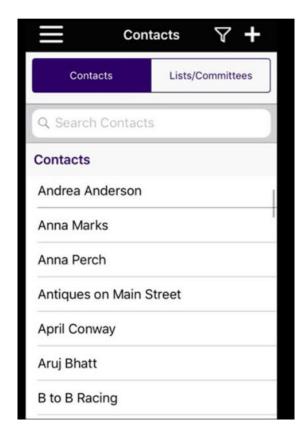
Click the **E** to view the left- hand navigation panel



Using the Staff App for Contact Management

Contacts:

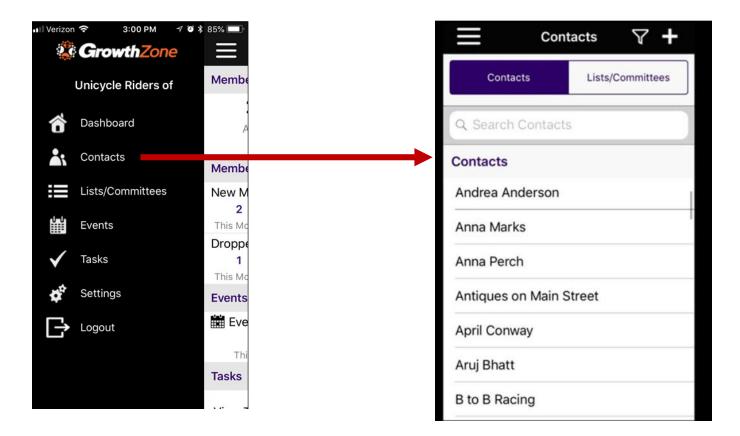
- Allows user to Add/Edit contacts
- Ability to sort contacts
- Scan business cards to add contact to database
- Contact's information is "clickable" which means tapping an address opens their location in device's default map app, their email address opens a new email draft, and a phone number triggers a phone call to start







With the Staff App, you can easily view your contacts WIKI: View Contacts



Using the Staff App for Contact Management **Content**

Easily filter your contacts by clicking the filter 🕎 icon

Anna Perch Antiques on Main Street April Conway Aruj Bhatt	\blacksquare Contacts ∇ +			
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Using the Staff App for Contact Management **GrowthZone**



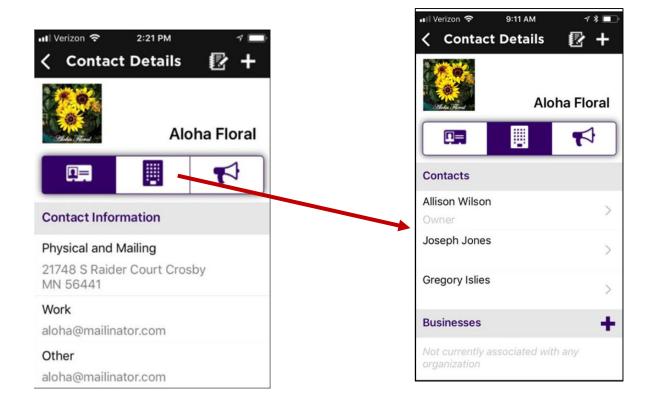
Icons make it easy to work with your contacts

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.



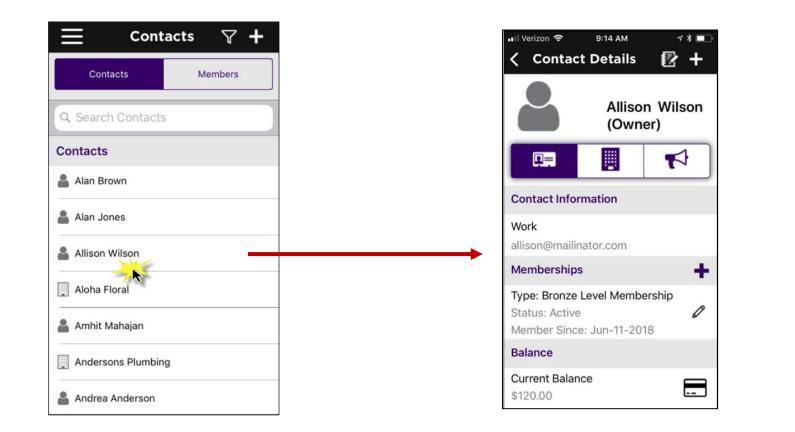
Once you have selected the appropriate contact, you can view the individuals related to an organization, or the organization related to an individual

WIKI: View Individuals related to an Organization



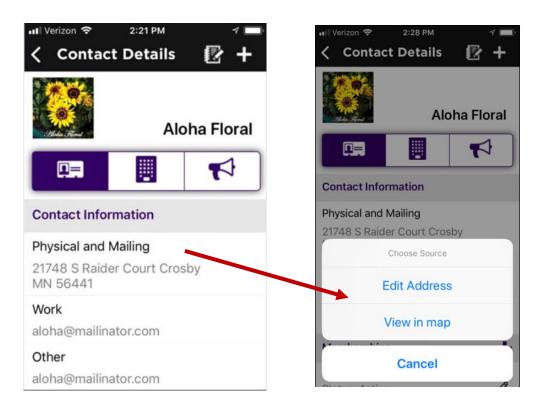


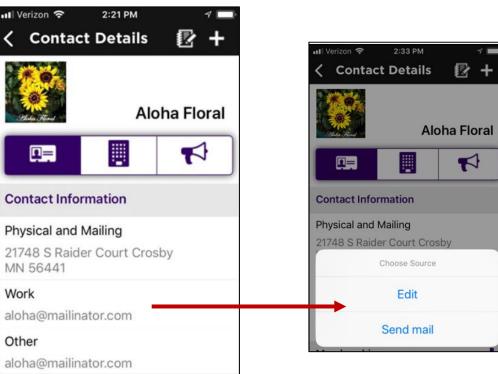
If working with an individual, view the organizations related to that individual WIKI: View Organizations related to an Individual



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

WIKI: Update Existing Contact Information







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

WIKI: Add Additional Contact Information

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Contact Details	₽ +	Phone, Email or Wel
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tact Information		State Province
ical and Mailing 8 S Raider Court Crosb 66441		Postal Code
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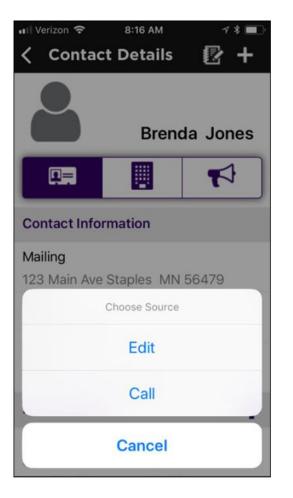


Using the Staff App for Contact Management 🎉 Growth

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

On the Contact Information tab, click the contact's phone number

WIKI: <u>Call a Contact Using the Staff App</u>





Using the Staff App for Contact Management 3 Growth

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

WIKI: Add A Contact

Contacts	Lists/Committees
Q Search Contacts	;
Contacts	
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Scan Busi	ness Card
Import Busine	ss Card Image
Import From PI	hone Contacts



19

Using the Staff App for Contact Management **Contemporation**

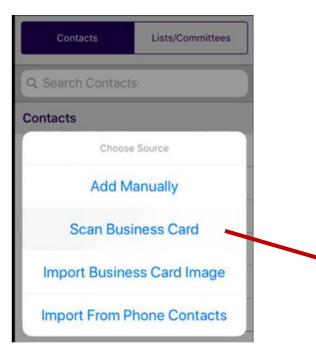
WIKI: Add a Contact Manually

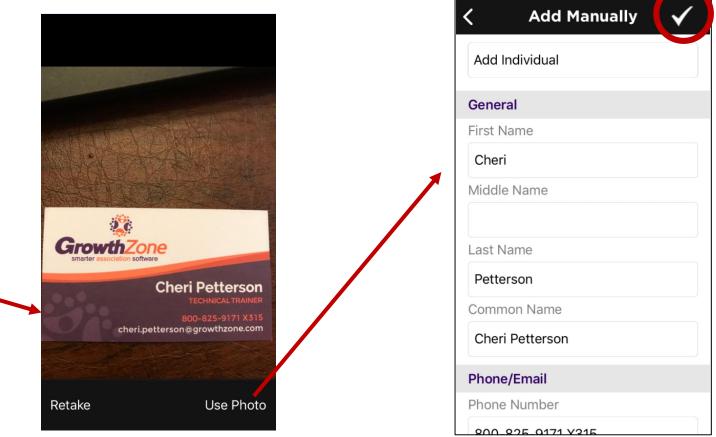
Contacts 🖓 🕂	
	Contacts Lists/Committees
Contacts Lists/Committees	Q Search Contacts
Q. Search Contacts	C Search Contacts
Contacts	Contacts
	Choose Source
Andrea Anderson	Add Manually
Anna Marks	
Anna Perch	Scan Business Card
Antiques on Main Street	Import Business Card Image
April Conway	
Aruj Bhatt	Import From Phone Contacts
B to B Racing	-



Using the Staff App for Contact Management Staff App for Contact Management







💵 Verizon 🔶

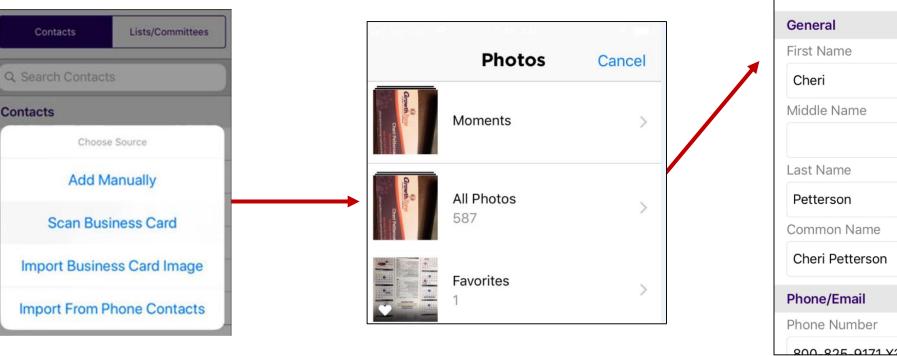
7:37 AM

Using the Staff App for Contact Management **Converte**

Import Business Card Image – this option allows you to use an image of a business card that is already on yur phone 7:37 AM 💵 Verizon 🗢

WIKI: Add Contact by Imported a Business Card Ima

ge	Add Individual
	General
el	First Name
	Cheri
>	Middle Name
	Last Name
>	Petterson
	Common Name
	Cheri Petterson
>	Phone/Email
	Phone Number
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Add Manually

Using the Staff App for Contact Management **Converses**

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7:49 AM

Phone Contacts

Add contact by importing from phone contacts

WIKI: Add from Phone Contacts

Cont

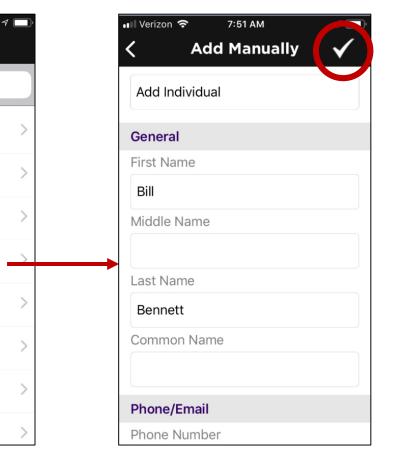
Q Search

Contacts

Import

Import

ontacts	Lists/Committees	1	Q Search contacts
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ts			Becky Mackay
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	anually		Bill Bennett
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ort From P	hone Contacts		Cassie Jacobi
			Crystal Nichols





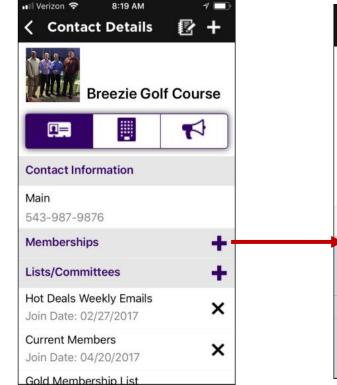
Using the Staff App for Contact Management **Contempone**

8:19 AM

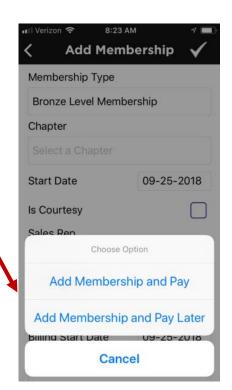


WIKI: Add A Membership

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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

WIKI: Drop a Membership

Image: Weight of the second	Il Verizon Image: Stock AM Contact Details Image: Stock AM Andersons Plumbing	Contact Details + Andersons Plumbing ••••••••••••••••••••••••••••••••••	Image: Werizon 2:23 PM 7 * ••• C Edit Drop Member ✓ End Date 08-27-2018 Reason Select a Reason Notes ••••••••••••••••••••••••••••••••••••
💄 Alan Jones	Contact Information	Contact Information	Invoices to Write Off
Liison Wilson	Main 2178886655	Main 2170000055 Membership Actions	Invoice Number : 567 Purchase Date : 06:13:2018
🛄 Aloha Floral	Memberships		Amount : \$200.00 Balance : \$200.00
🛔 Amhit Mahajan	Type: Business Main Membership Status: Active Member Since: Aug-14-2016	Drop Membership	Invoice Number : 610 Purchase Date : 07:16:2018
Andersons Plumbing	Balance	Delete Membership Baiance	Amount : \$1,250.00
Andrea Anderson	Current Balance	Cancel	Balance : \$1,225.00 Invoice Number : 644

Using the Staff App for Contact Management 3 Growth

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

WIKI: Delete a Membership

Itel Verizon E Contacts Contacts Members Q Search Contacts Contacts Contacts Alan Jones	IVerizon 8:06 AM Contact Details Image: Imag	Contact Information	 Contact Details Andersons Plumbing C GrowthZone Do you want delete this membership? Yes Yes
Liison Wilson	Main 2178886655	2170000000	
🛄 Aloha Floral	Memberships +	Membership Actions Drop Membership	Type: Business Main Membership Status: Active 🖉 Member Since: Aug-14-2016
Amhit Mahajan Andersons Plumbing	Status: Active Member Since: Aug-14-2016 Balance	Delete Membership Balance	Balance Current Balance
La Andrea Anderson	Current Balance \$2,725.00	Cancel	\$2,725.00

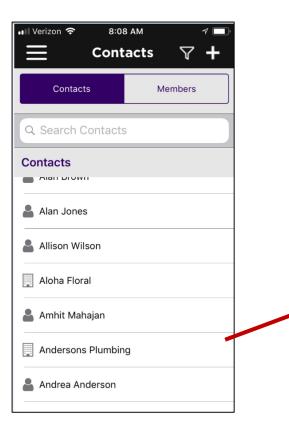


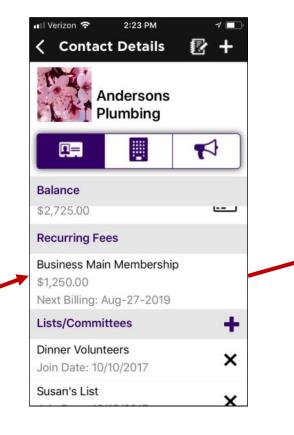
8:10 AM

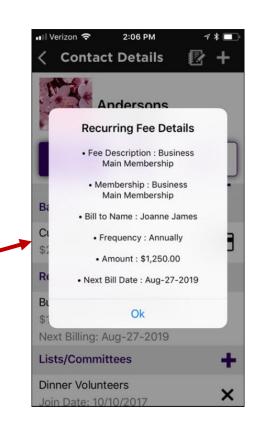
Using the Staff App for Contact Management **Converses** GrowthZone

You can view a contacts recurring fee schedule

WIKI: View Recurring Fee Schedule



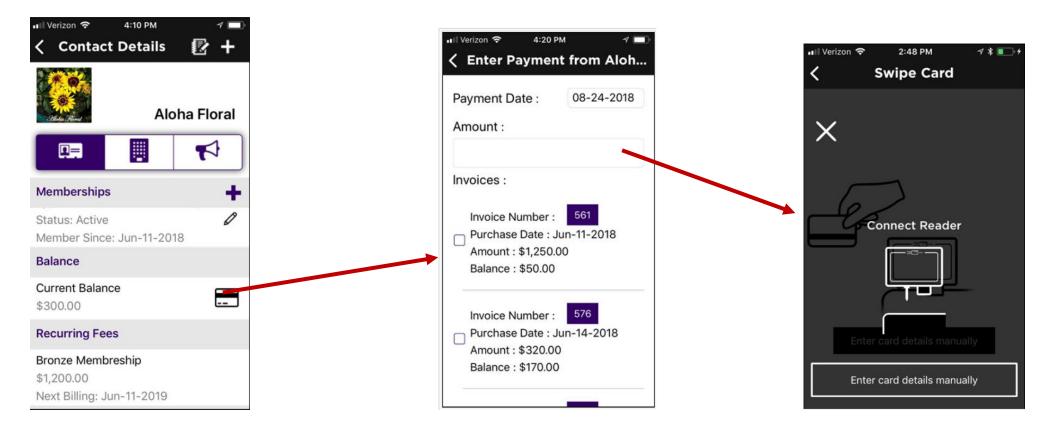








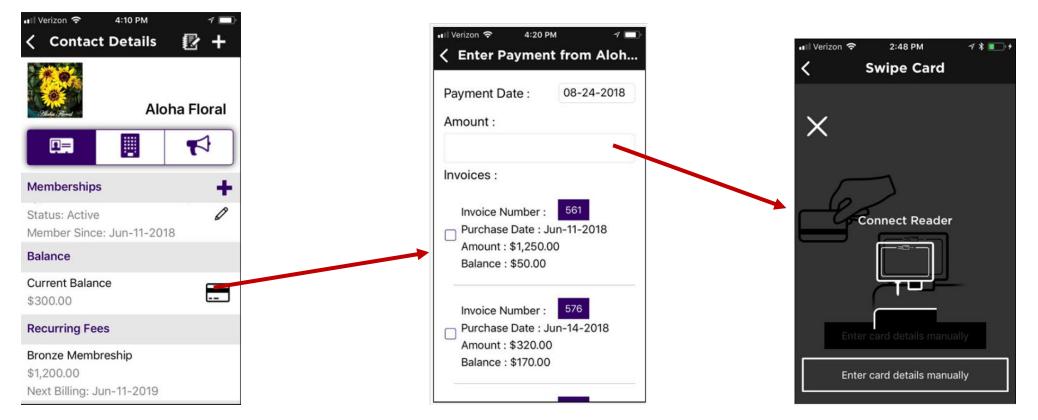
Using the staff app, you can easily view a contact's open invoices, and, if using **GrowthZone Pay** accept credit card payment for open invoices.WIKI: WIKI: View & Manage a Contact's Balance





Using the staff app, you can easily view a contact's open invoices, and, if using **GrowthZone Pay** accept credit card payment for open invoices.

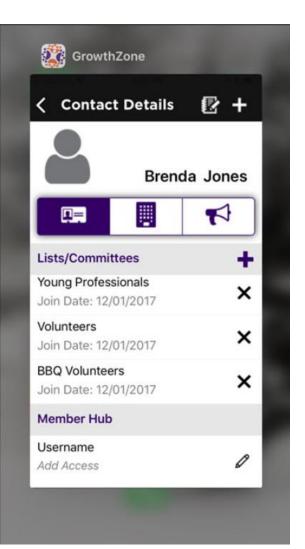
WIKI: View & Manage a Contact's Balance



Using the Staff App for Contact Management 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

WIKI: Manage Info Hub Access





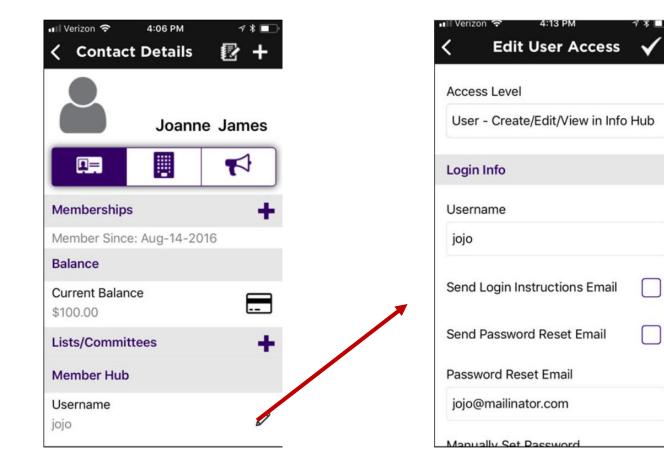
Using the Staff App for Contact Management **Contact** Contact Management



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

■ Contacts 7 +	GrowthZone	< Edit User Access <
Contacts Members	< Contact Details 😰 🕂	Access Level
Q Search Contacts	Brenda Jones	User - Create/Edit/View in Info Hub
Contacts		Login Info
Boardwalk Marina	Lists/Committees	Username
Bombay's	Young Professionals Join Date: 12/01/2017	jojo
💄 Brandon Zinda	Volunteers X	Cancel Select a Access Level Done
Breezie Golf Course	BBQ Volunteers Join Date: 12/01/2017	
Brenda Jones	Member Hub	User - View Only in Info Hub
	Username Add Access	User - Create/Edit/View in In
🛔 Brenda Lundeen		User - Full Control in Info Hub
Brown Cow Creamery		Website Only Access

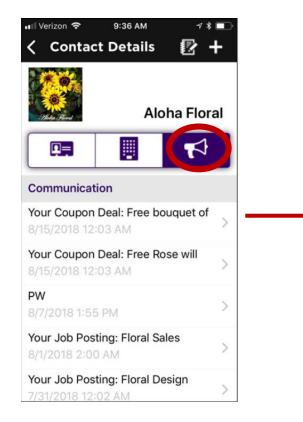
You can easily update a user's access using the staff app, as well as reset their password (either manually or by sending them the reset email)

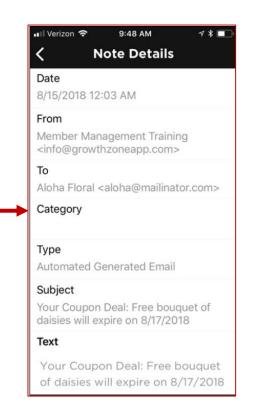


Managing Communications using the Staff Ap

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

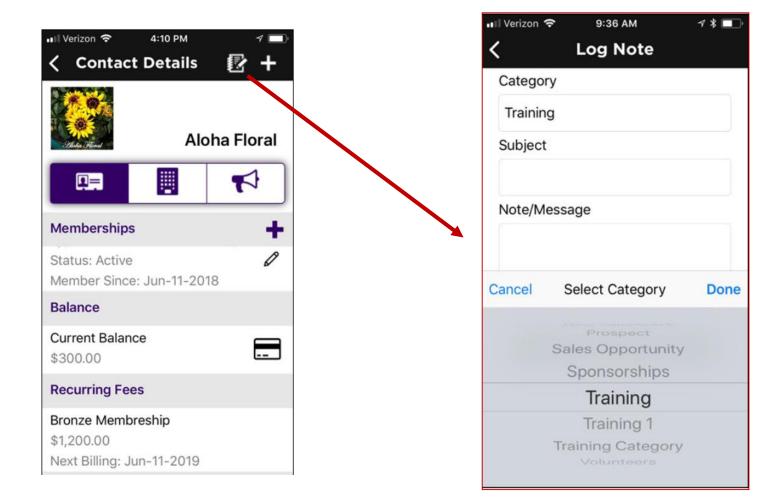
WIKI: Managing Communications





Managing Communications using the Staff Ap

You can easily log notes





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

WIKI: Managing Events

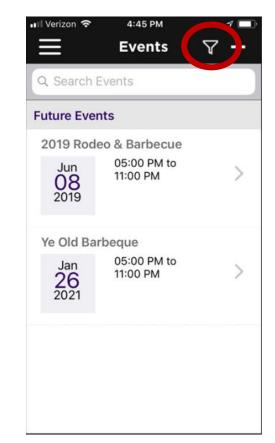
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<	Event Details	<u>_</u> +
GENERAL	INFORMATION	
	Ye Old Barbeque	
Description		
Northern M	the best barbecue innesota. Craft be brave ride the m	er, music
Start Time		
8/11/2018 5	:00 PM	
End Time		
8/11/2018 1	1:00 PM	
Location		
21748 S Ra	ider Court Crosby	MN 56441
	Check-in closed	

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.

WIKI: <u>View Events</u>



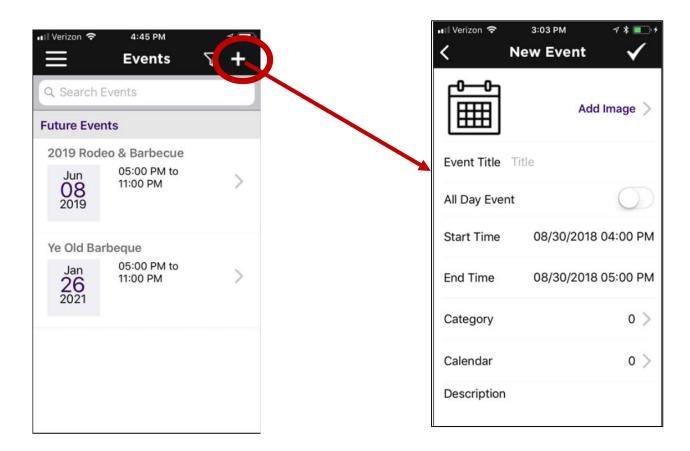


Managing Events with the GrowthZone App



Using the App you can easily add events

WIKI: Add an Event

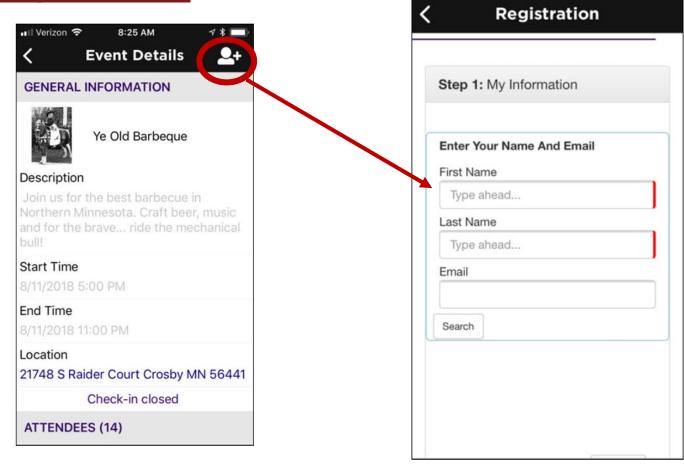


Managing Events with the GrowthZone App



You can easily add registrations to an event...

WIKI: Add Registrations



8:25 AM

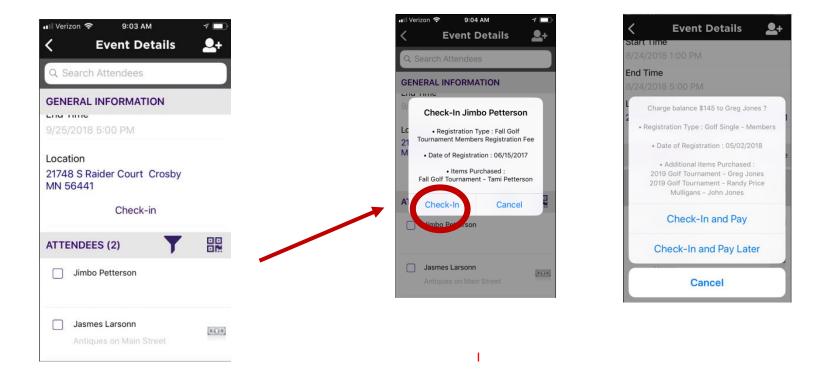
78

III Verizon ♀



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

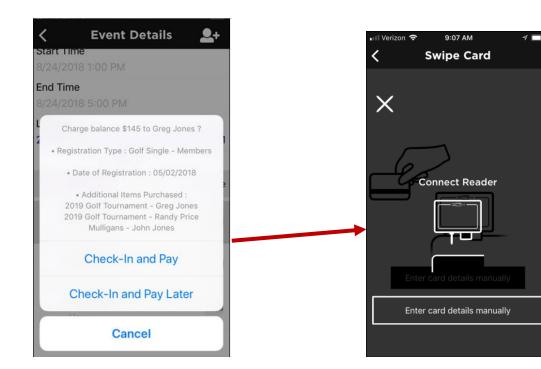
WIKI: <u>Checking in Event Attendees</u>





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

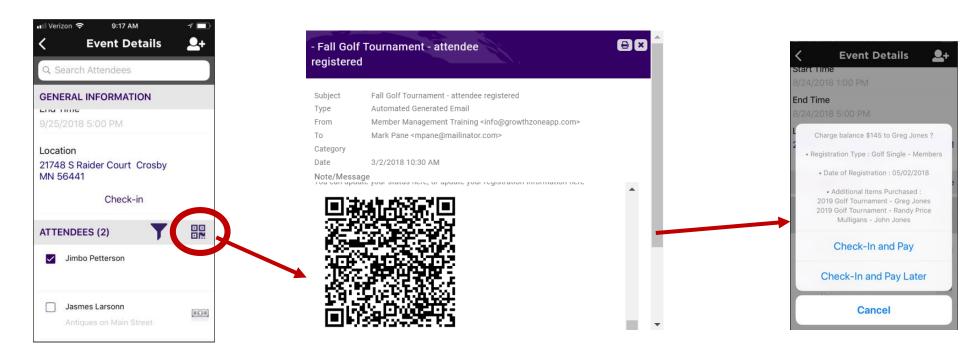


Managing Events with the GrowthZone App



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

WIKI: Scanning QR Codes





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

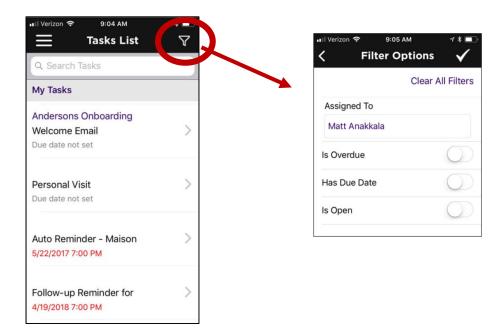
WIKI: <u>Reviewing & Managing Tasks</u>

III Verizon 🗢 9:04 AM	78
Tasks Lis	st 🍸
Q Search Tasks	
My Tasks	
Andersons Onboarding	
Welcome Email	>
Due date not set	
Personal Visit	>
Due date not set	
Auto Reminder - Maiso	n >
5/22/2017 7:00 PM	
Follow-up Reminder for	r >
4/19/2018 7:00 PM	



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

WIKI: <u>Reviewing & Managing Tasks</u>





Easily review task details & mark tasks as completed

ull Verizon 奈 9:24 AM Tasks List	✓ ■)•	vill Verizon 중 9:26 AM Contract Sector Size AM	ull Verizon 중 9:24 AM 〈 Task Details
Q Search Tasks		TASK INFORMATION	TASK INFORMATION
My Tasks		Project Name	Project Name
Doit Chan		Bombay On-boarding	Bombay On-boarding
Bait Shop Welcome Letter	>	Task	Task
Due date not set	-	Welcome Letter	Welcome Letter
Bait Shop		Due Date	GrowthZone
Ambassador Visit	>	Due date not set	Do you want to mark this tas Dt as complete?
Due date not set		Description	
Bait Shop		Send new member welcome letter & welcome packet	Di Yes No
Welcome Email			Send new member welcome letter & welcome p
Due date not set			
Bombay On-boarding			
Welcome Letter	>		
Due date not set			



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

WIKI: Managing Lists/Committees

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Lists/Committees	
Q Search Lists/Committees	
Lists/Committees	
BBQ Volunteers	10 >
Billing/Finance	22 >
Board Alumni	1 >
Brandons Sales	0
Business Spotlight	1 >
Committee - Summer	13 >
Committee Chairs	0
Community News	0

Managing Lists/Committees



View the list/committee roster...

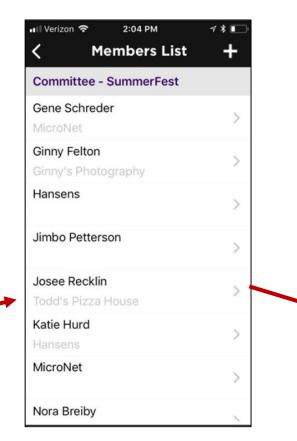
erizon 🗢 2:05 PM Lists/Committee	≁ * ∎⊃ S	・III Verizon 令 く M	2:04 PM embers List
Search Lists/Committees		Committee -	SummerFest
s/Committees		Gene Schrede	ər
3Q Volunteers lling/Finance	10 >	MicroNet Ginny Felton Ginny's Photo	graphy
pard Alumni	1 >	Hansens	
andons Sales	0	Jimbo Petters	on
usiness Spotlight	1>	Josee Recklin Todd's Pizza	
ommittee - Summer	13 >	Katie Hurd	
ommittee Chairs	0	Hansens	
ommunity News	0	Wichonet	
		Nora Breiby	

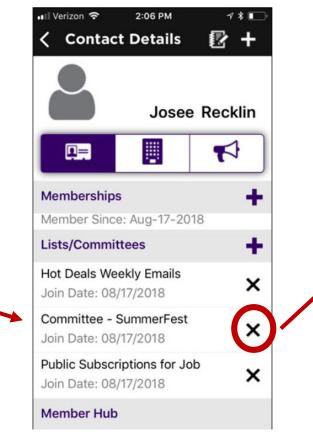
Managing Lists/Committees

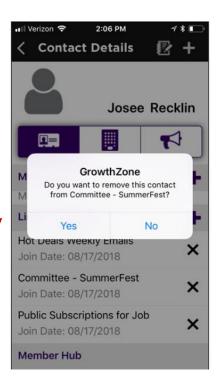


Remove Contact from List/Committee Roster...

Il Verizon 🗢 2:05 PM	⋪ ¥ 🕞
Lists/Committees	5
Q Search Lists/Committees	
Lists/Committees	
BBQ Volunteers	10 >
Billing/Finance	22 >
Board Alumni	1 >
Brandons Sales	0
Business Spotlight	1 >
Committee - Summer	13 🏓
Committee Chairs	0
Community News	0







Managing Lists/Committees



Add a Contact to a List/Committee...

III Verizon 🗢 2:05 PM	⋪ \$ ∎ு	
Lists/Committees	5	
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Lists/Committees		
BBQ Volunteers	10 >	
Billing/Finance	22 >	
Board Alumni	1 >	
Brandons Sales	0	
Business Spotlight	1 >	
Committee - Summer	13 🔶	
Committee Chairs	0	
Community News	0	

🖬 Verizon 🗢	2:04 PM	1/-
M	embers List	+
Committee -	SummerFest	
Gene Schrede	er	>
MicroNet		
Ginny Felton Ginny's Photo	ography	>
Hansens		>
		>
Jimbo Petters	son	>
Josee Recklin	1	
Todd's Pizza		>
Katie Hurd		>
Hansens		
MicroNet		>
Nere Dreiby		
Nora Breiby		~



Questions?

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