

# GrowthZone - Working with the Staff App

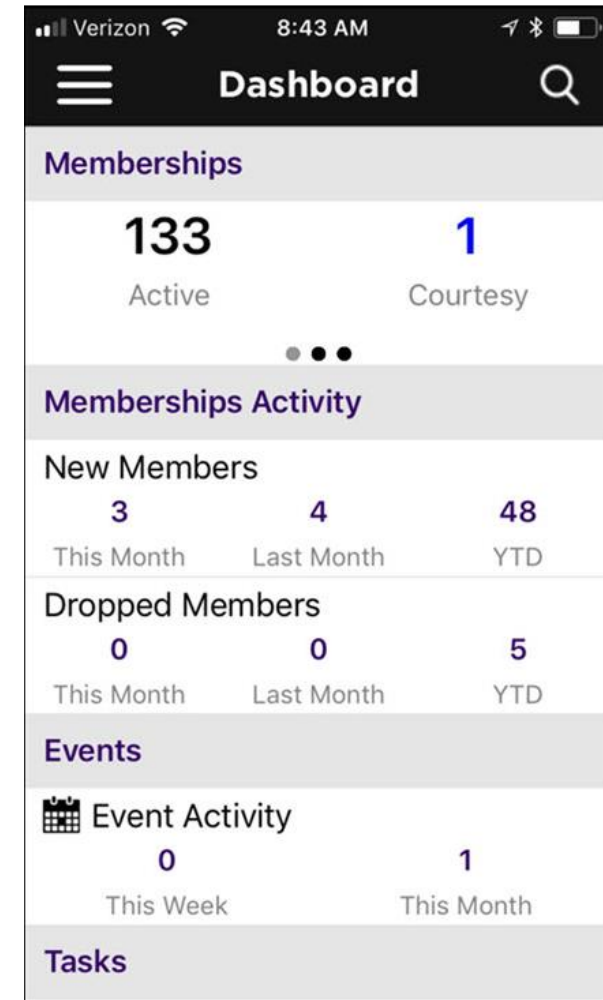


- How to Navigate the Staff App
- How to Manage Contacts
- How to Manage Events
- How to Manage Lists/Committees
- How to Manage Tasks

# Overview

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



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

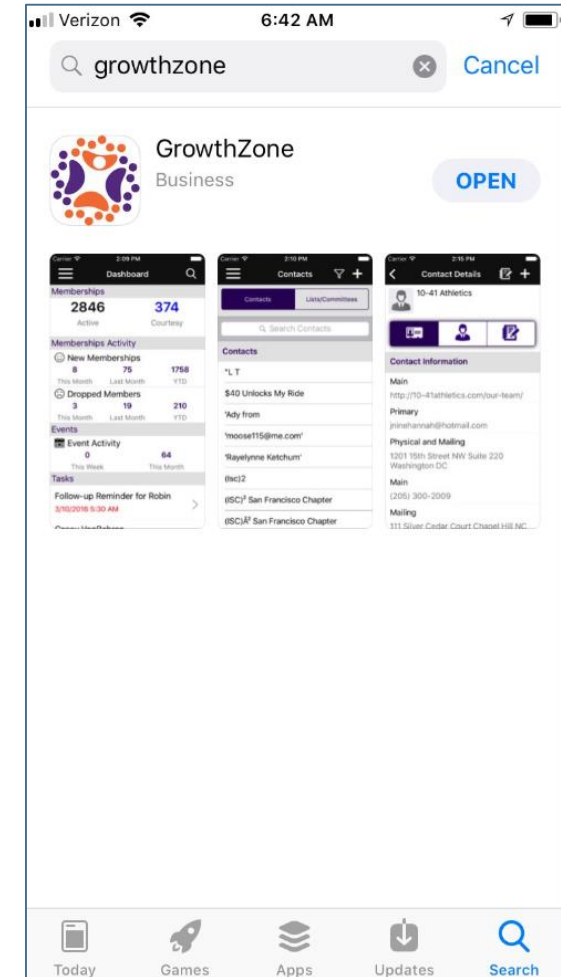
## Download the Staff App

The Staff App is available for both Apple and Android devices

Search for “GrowthZone” in the app store

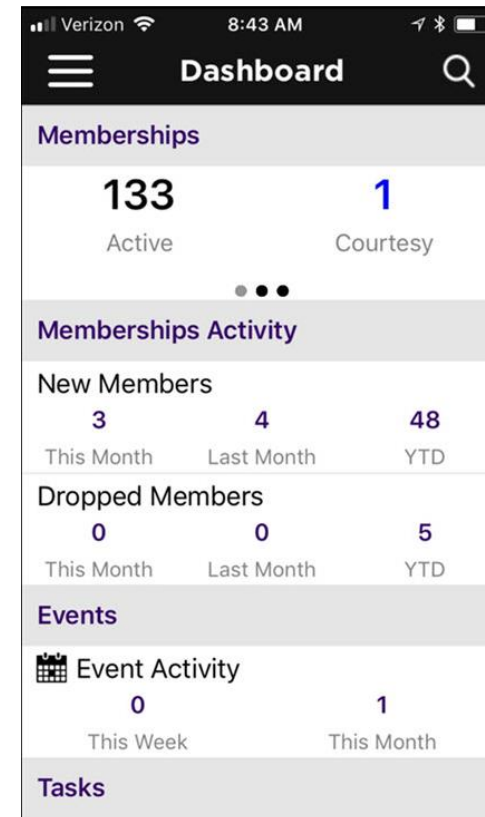
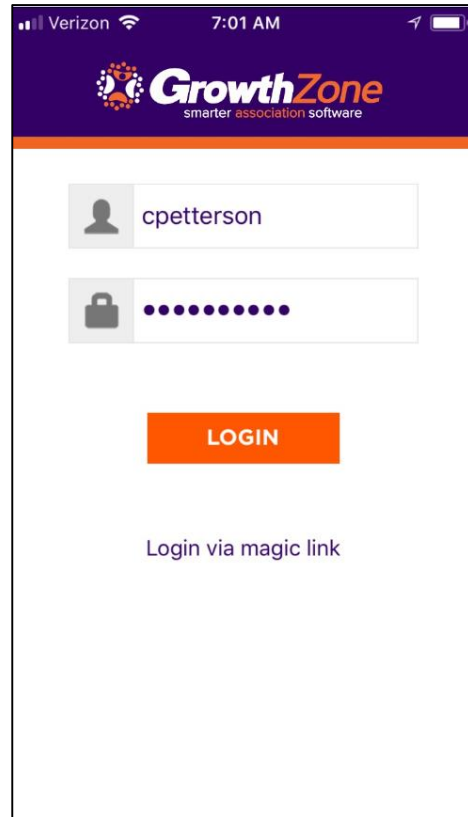
Compatibility:

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



# Staff App Navigation

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

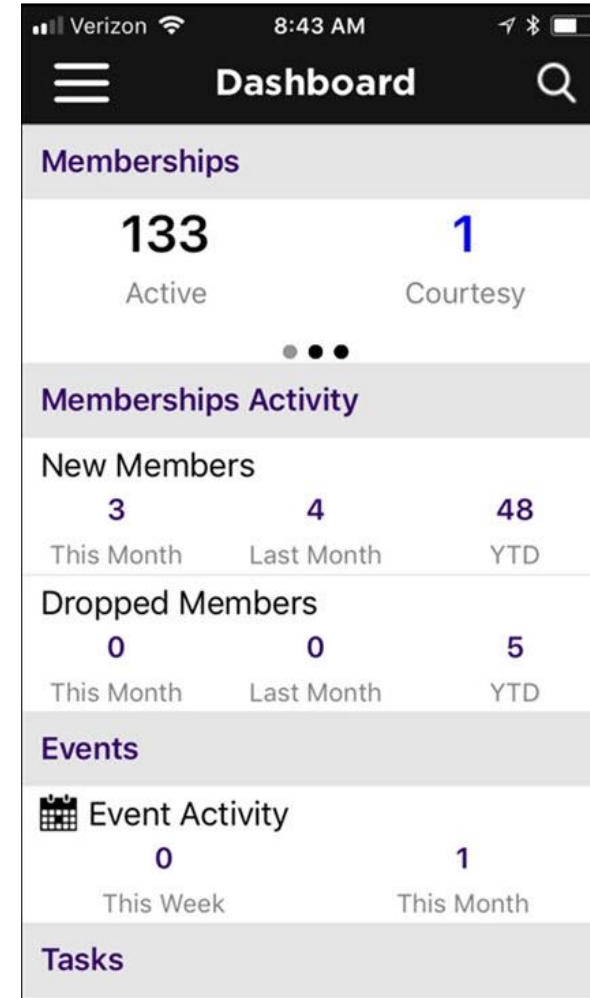


# Staff App Navigation


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

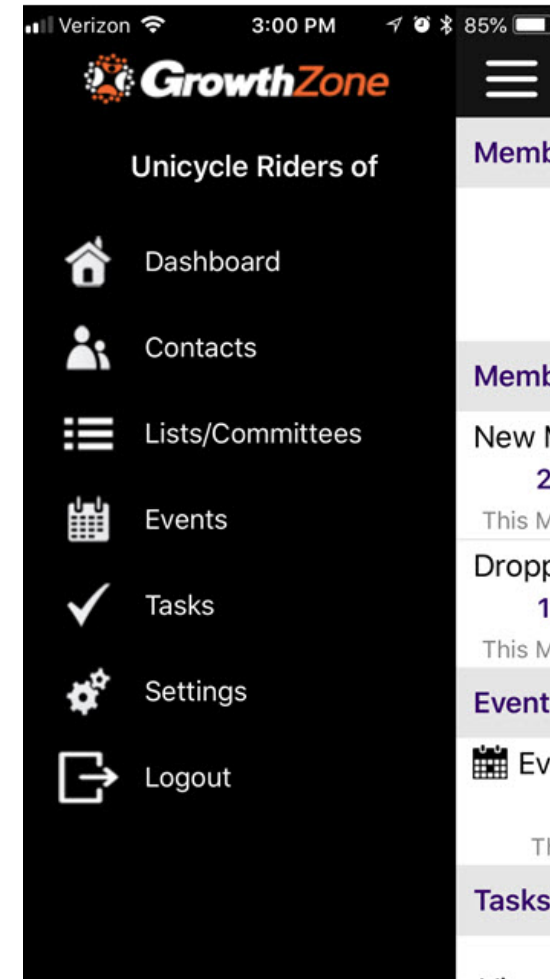
The Dashboard provides an at a glance understanding of your Memberships, Events, Tasks and Lists and Committees

WIKI: [Staff App Navigation](#)



# Staff App Navigation

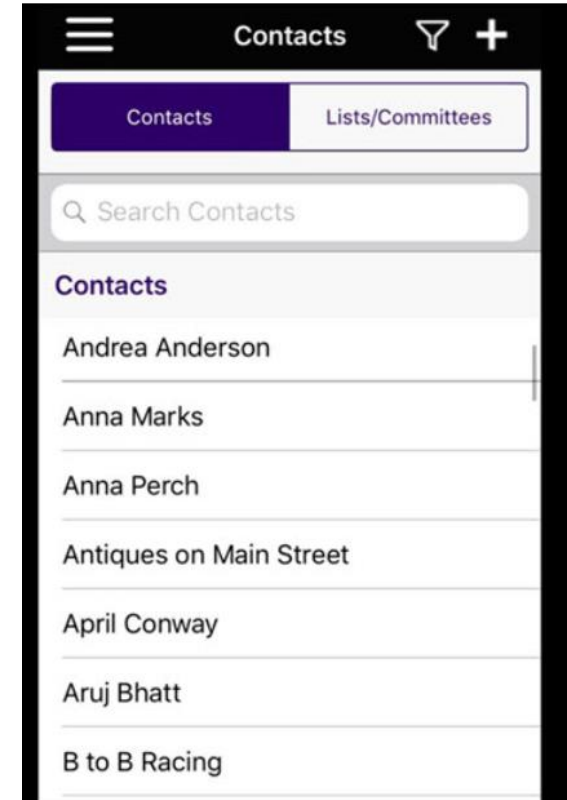
Click the  to view the left-hand navigation panel





## Contacts:

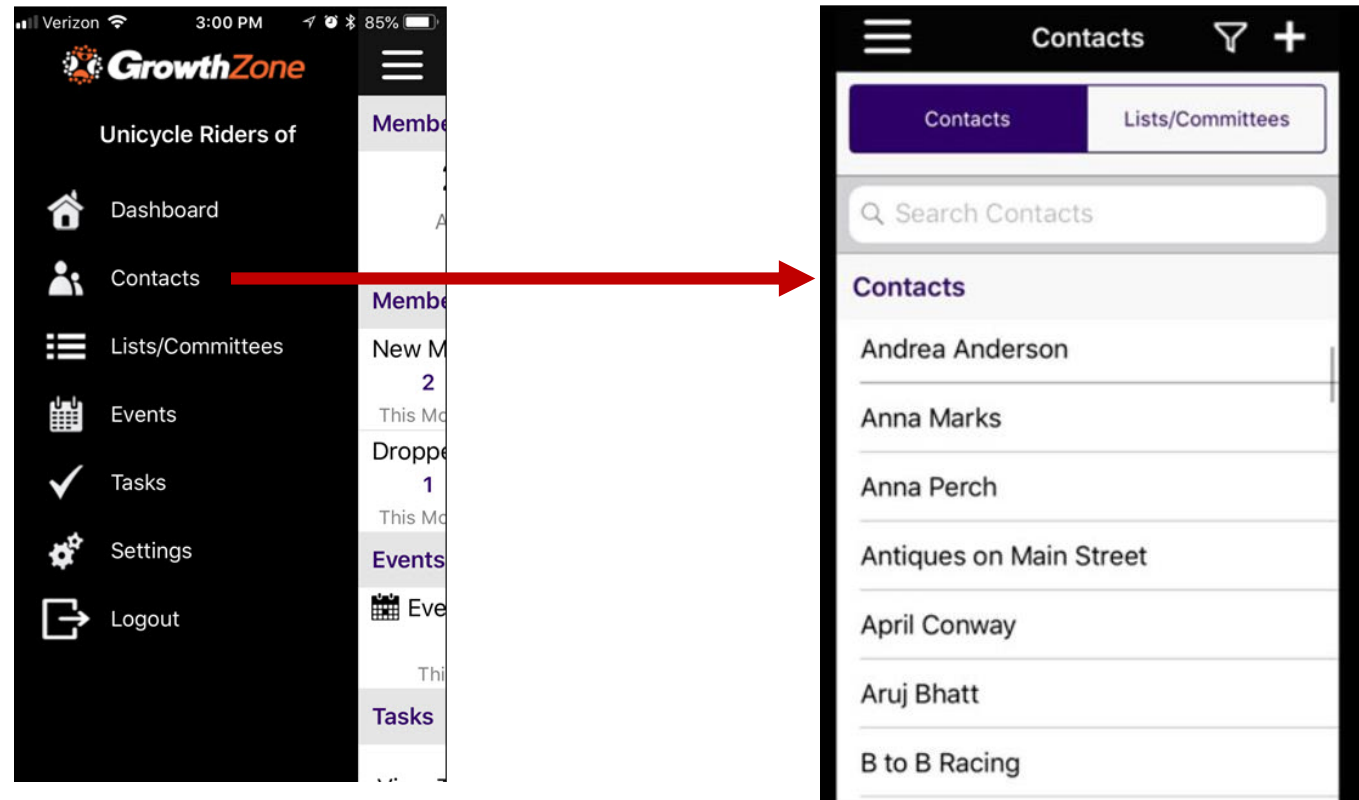
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# Using the Staff App for Contact Management

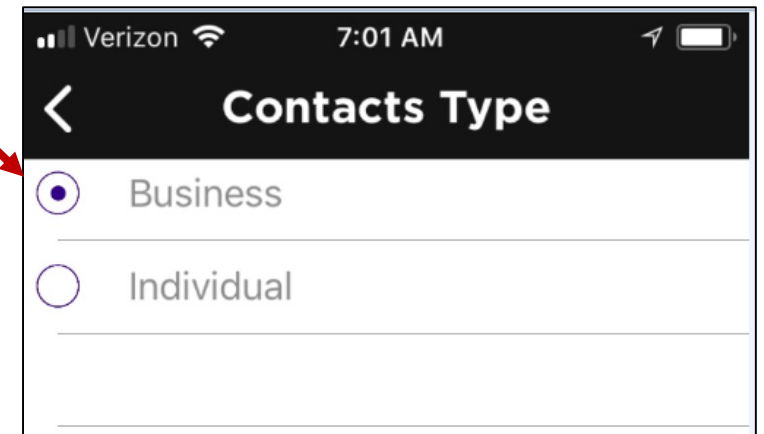
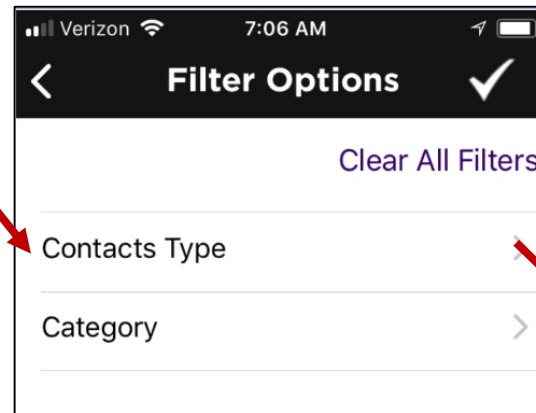
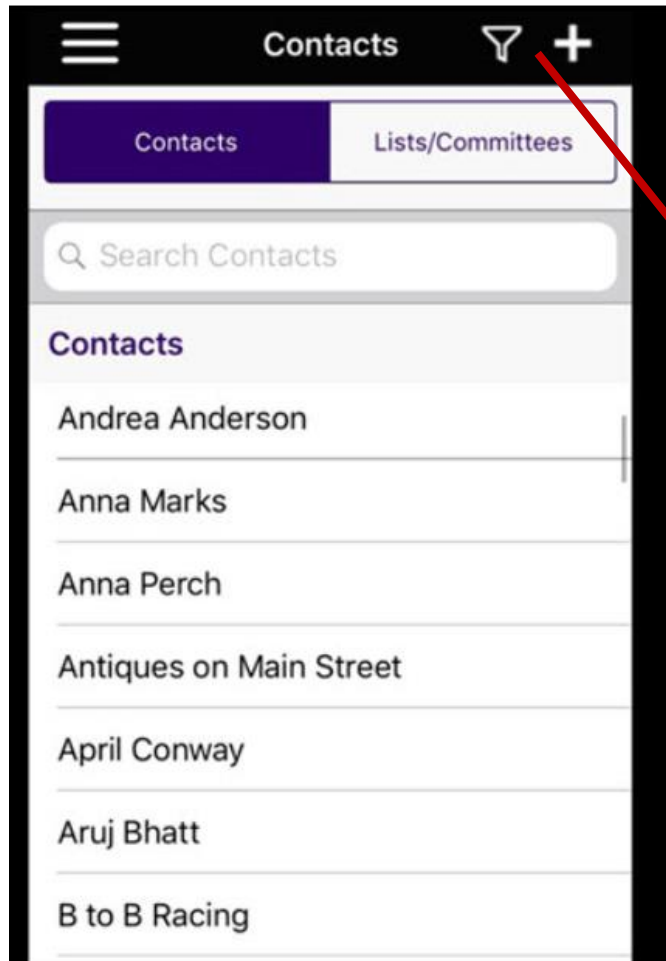
With the Staff App, you can easily view your contacts

WIKI: [View Contacts](#)






# Using the Staff App for Contact Management

Easily filter your contacts by clicking the filter  icon



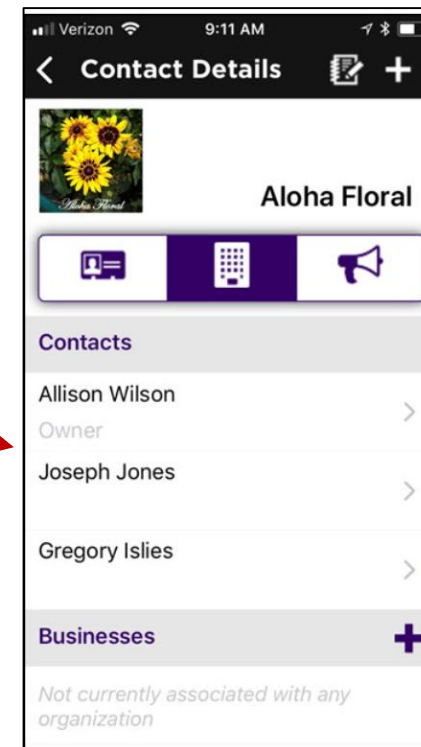
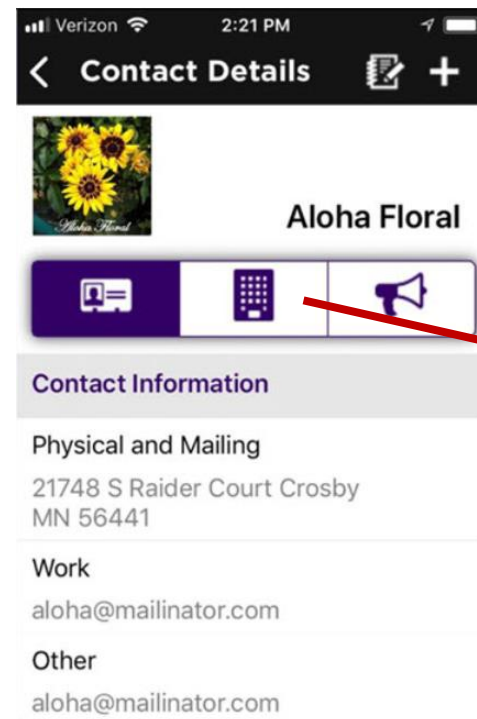
## Icons make it easy to work with your contacts

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.

# Using the Staff App for Contact Management GrowthZone smarter association software

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

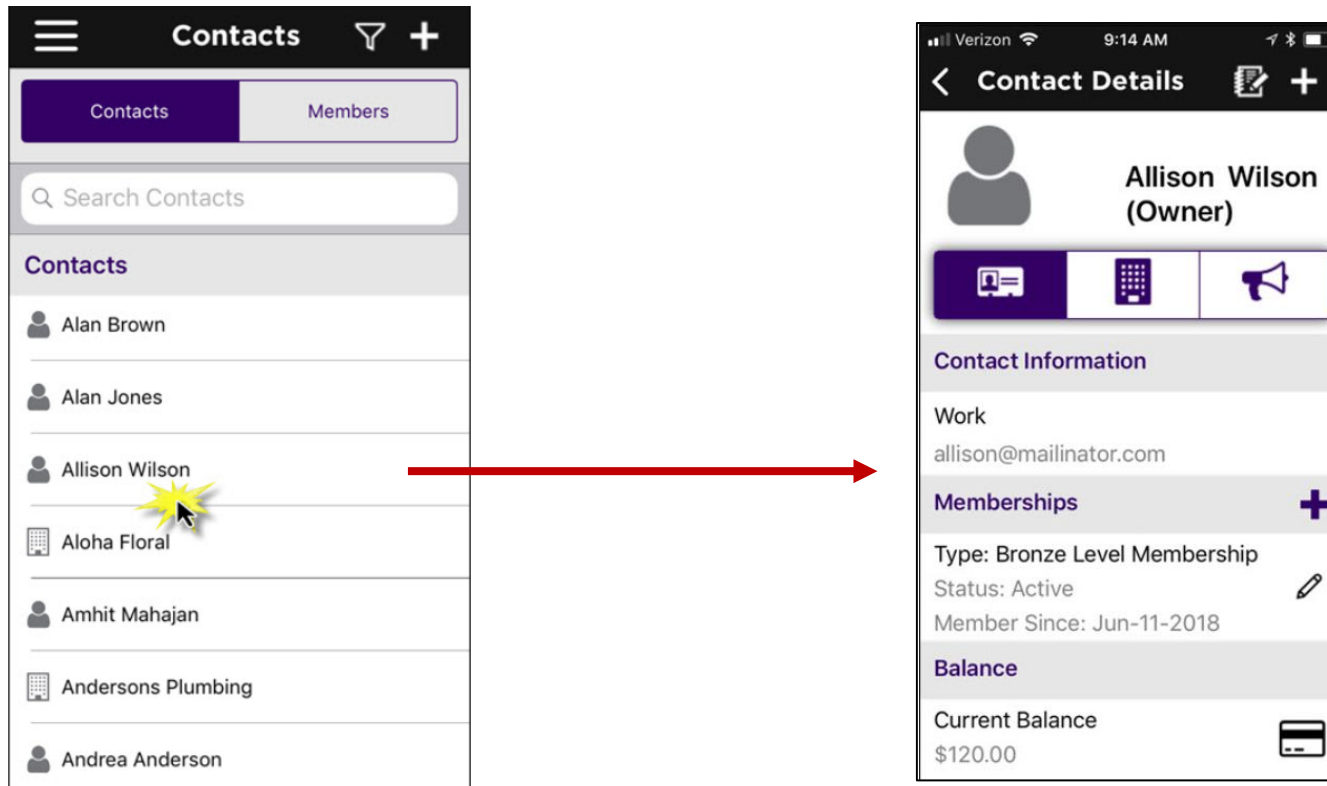
WIKI: [View Individuals related to an Organization](#)



# Using the Staff App for Contact Management

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

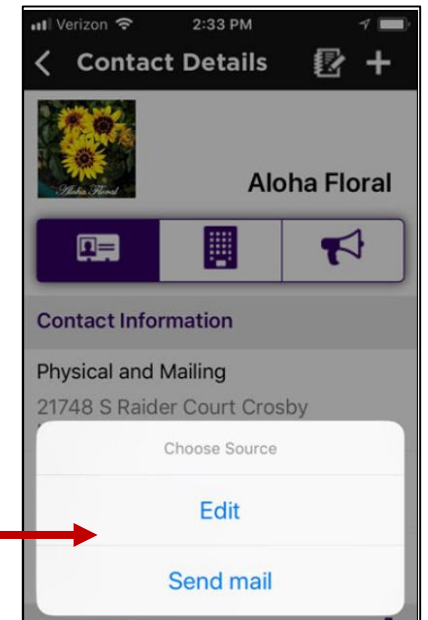
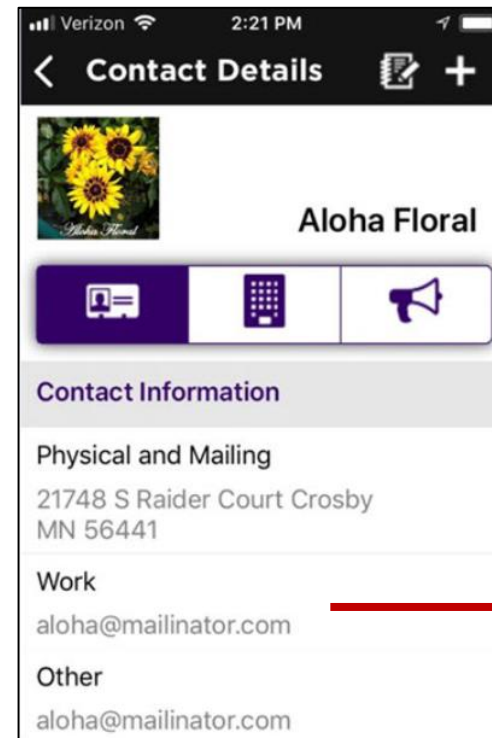
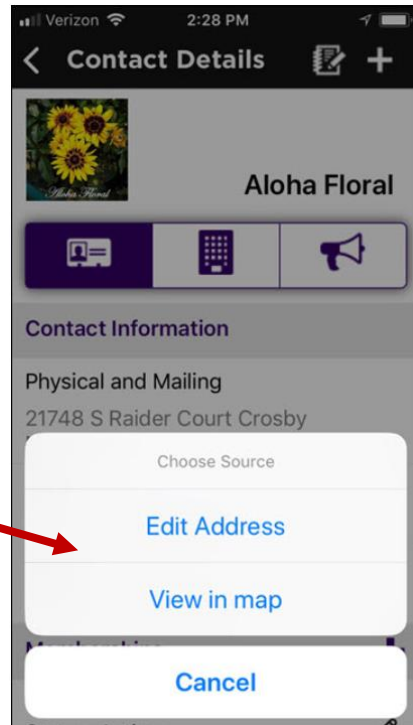
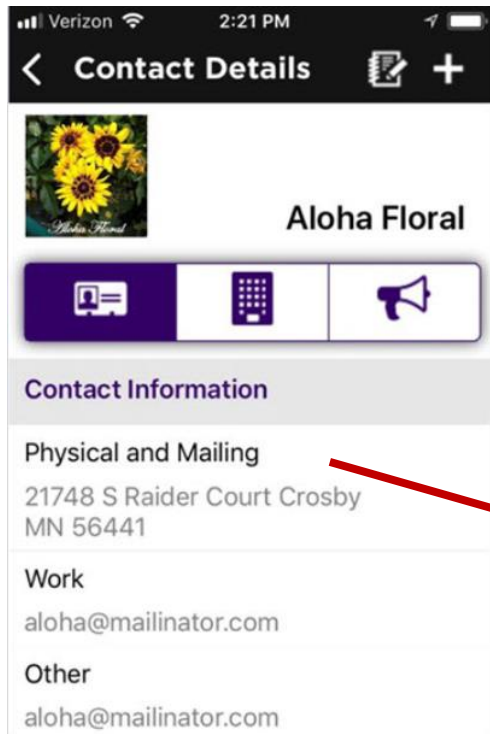
WIKI: [View Organizations related to an Individual](#)



# Using the Staff App for Contact Management **GrowthZone** smarter association software

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

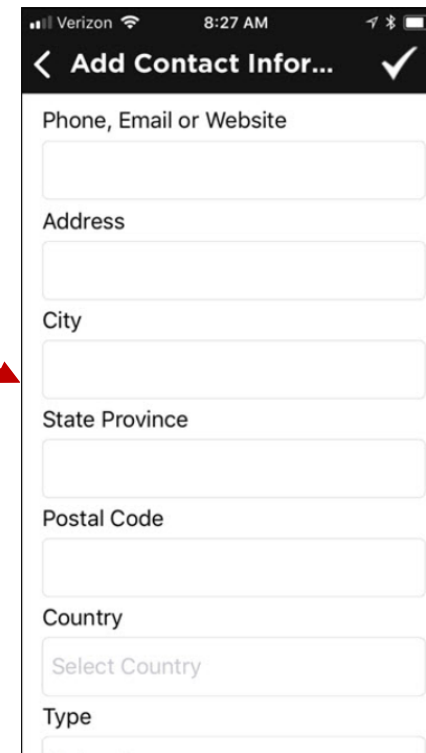
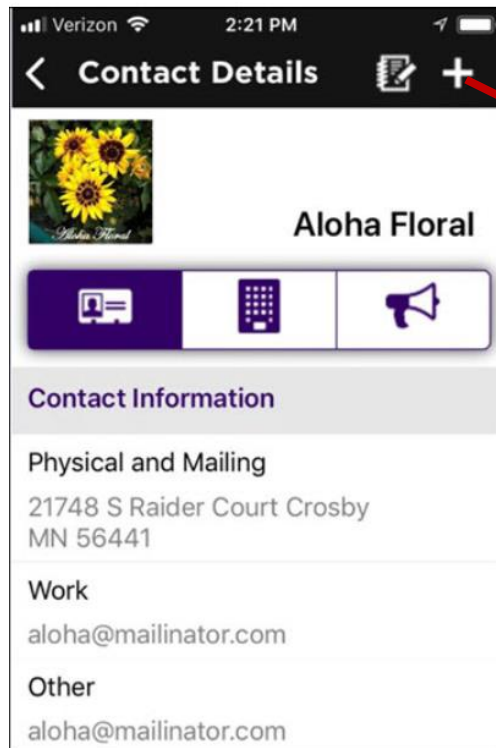
WIKI: [Update Existing Contact Information](#)



# Using the Staff App for Contact Management

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

WIKI: [Add Additional Contact Information](#)



A screenshot of the Staff App showing the 'Add Contact Information' form. The form has a title bar with a back arrow, 'Add Contact Infor...', and a checkmark. The form fields are: 'Phone, Email or Website', 'Address', 'City', 'State Province', 'Postal Code', 'Country' (with a 'Select Country' dropdown), and 'Type'.

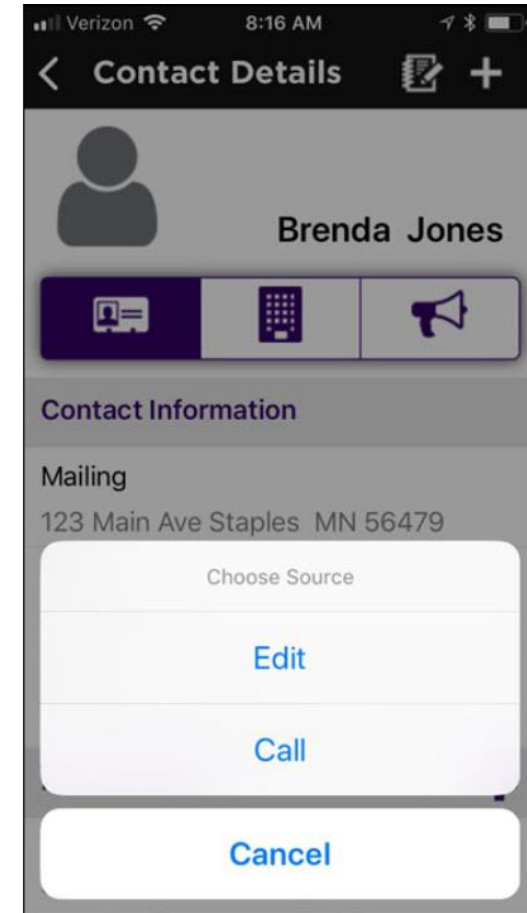


# Using the Staff App for Contact Management

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

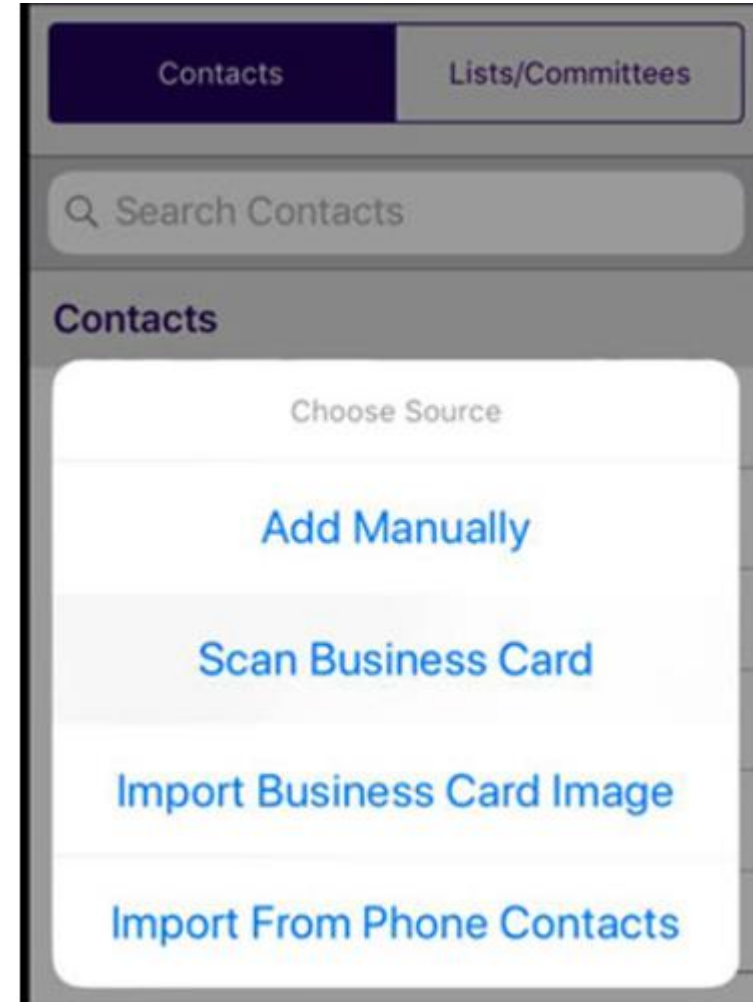
WIKI: [Call a Contact Using the Staff App](#)



# Using the Staff App for Contact Management

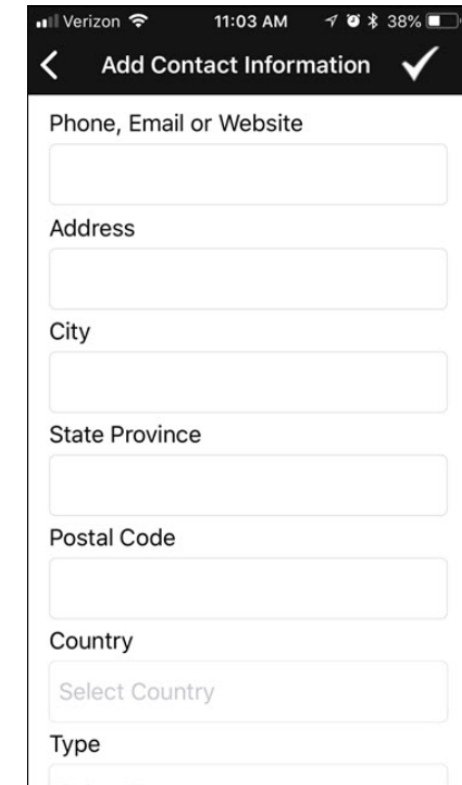
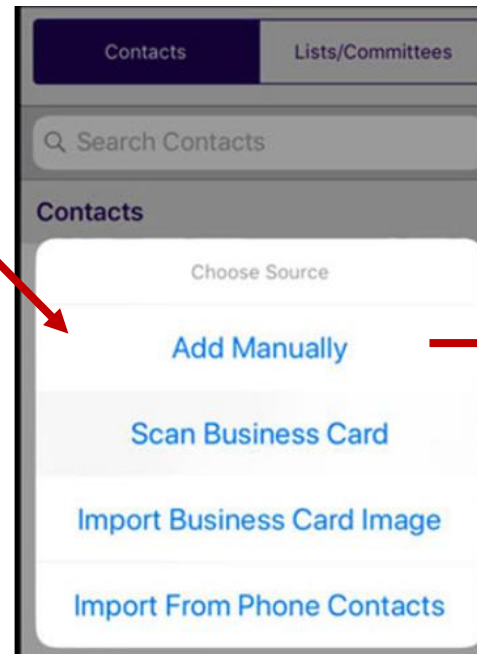
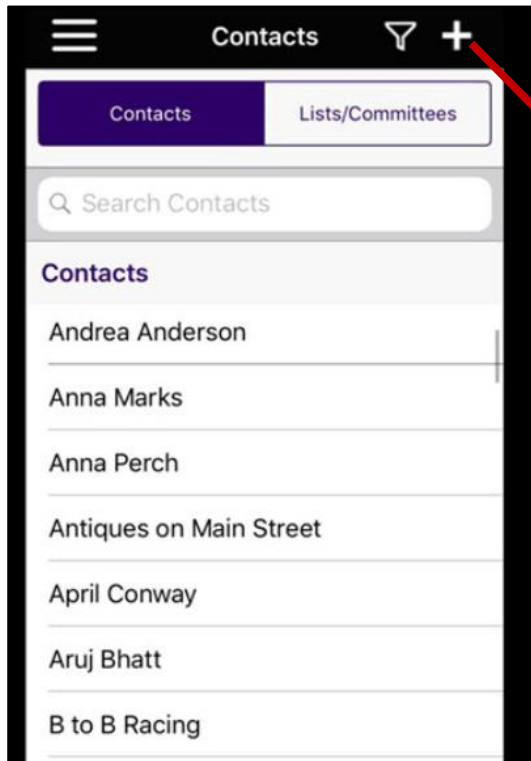
With the Staff App you can easily add new contacts to your database...

WIKI: [Add A Contact](#)



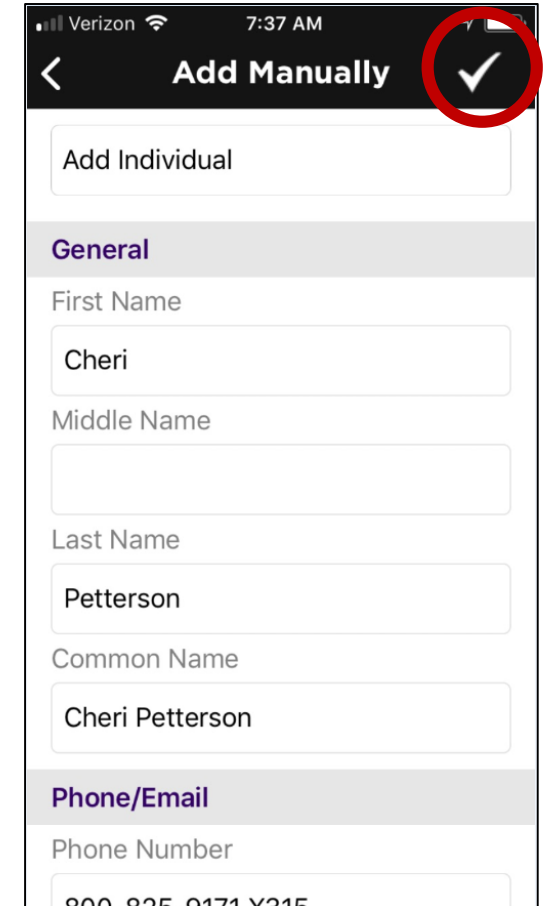
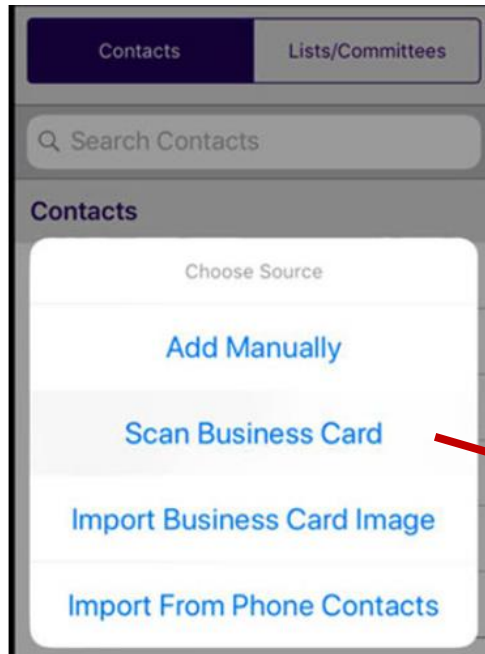
# Using the Staff App for Contact Management

## WIKI: Add a Contact Manually



# Using the Staff App for Contact Management

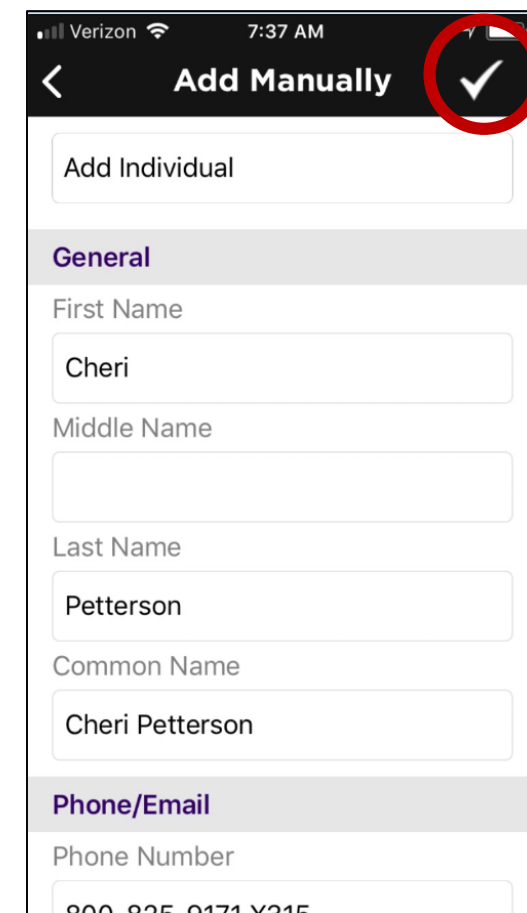
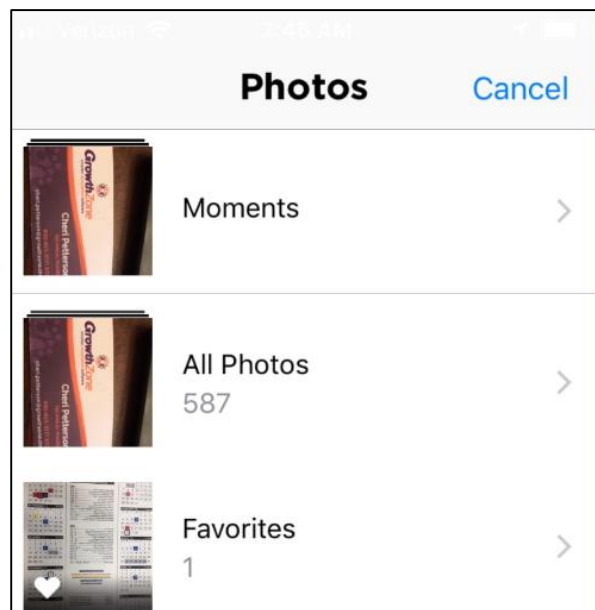
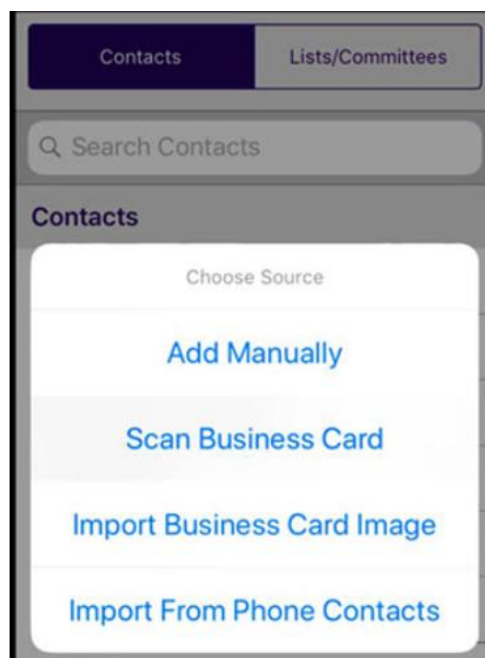
## WIKI: Scan A Business Card



# 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

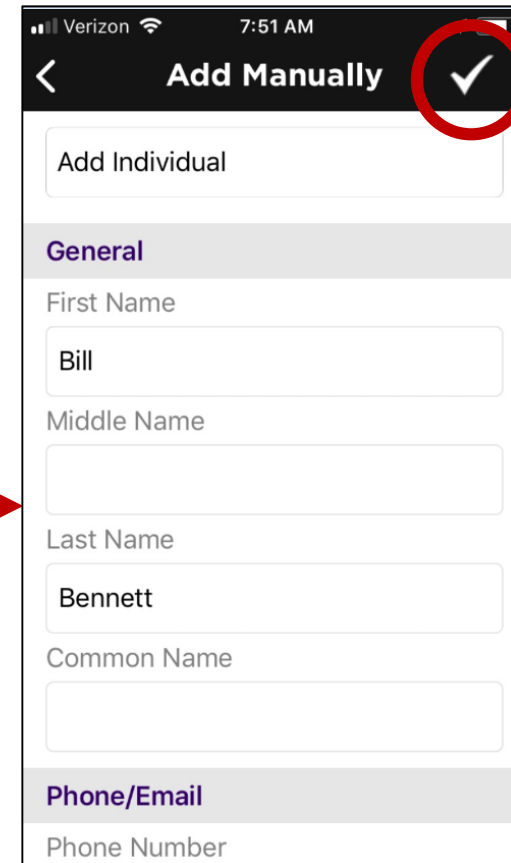
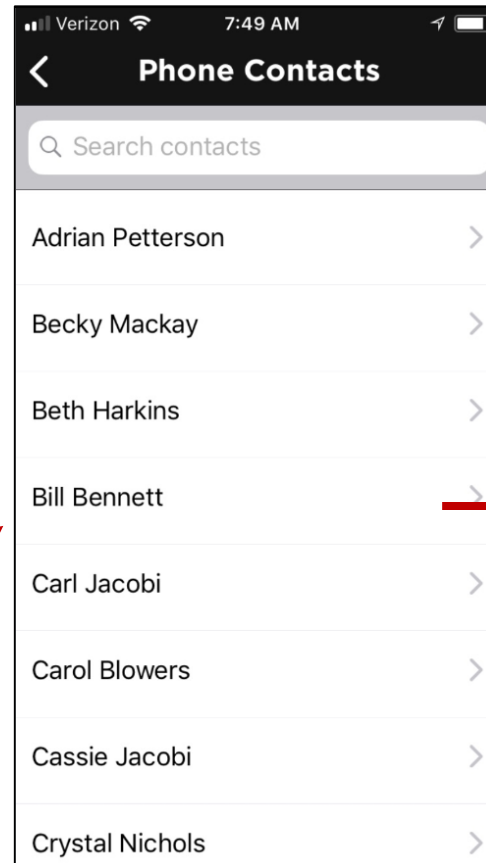
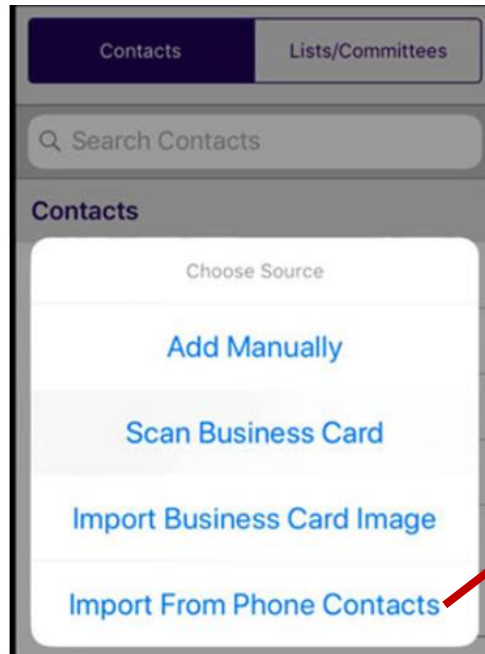
WIKI: [Add Contact by Imported a Business Card Image](#)



# Using the Staff App for Contact Management

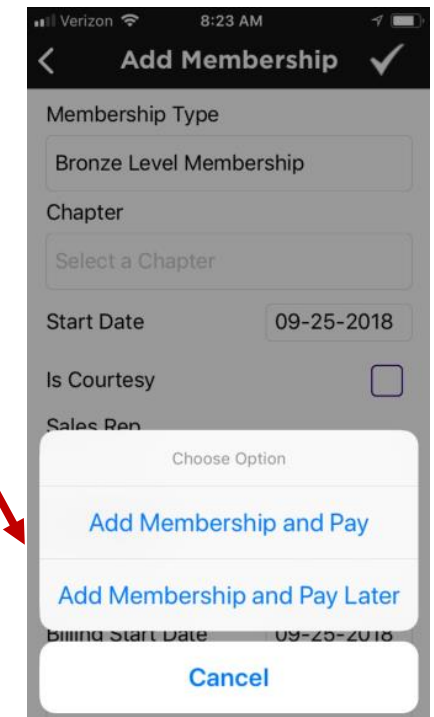
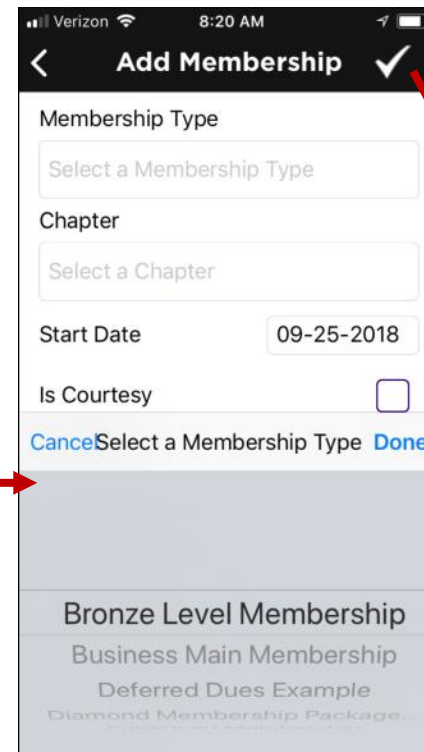
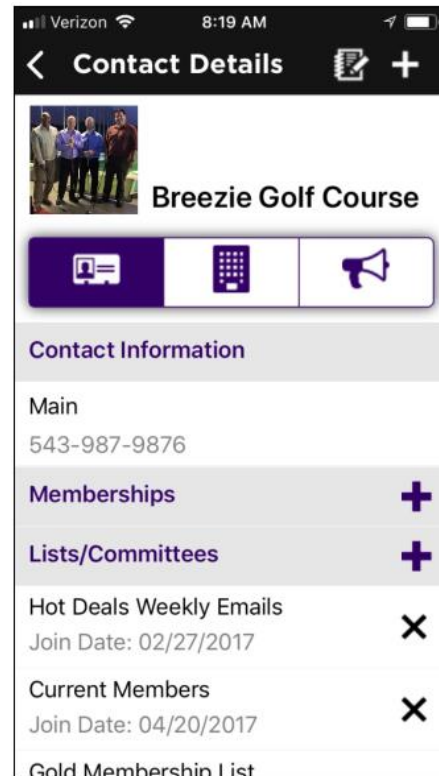
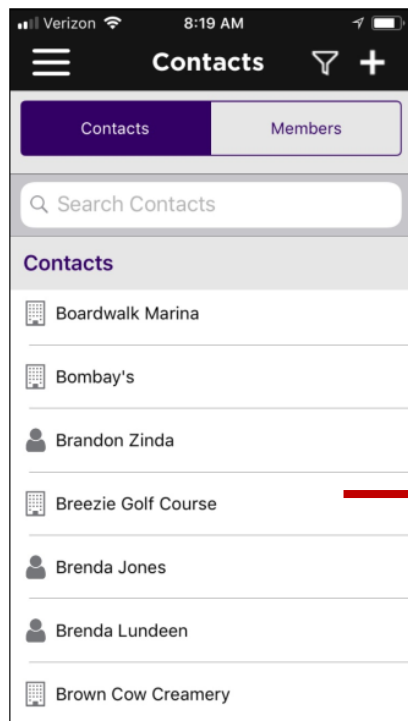
Add contact by importing from phone contacts

WIKI: [Add from Phone Contacts](#)



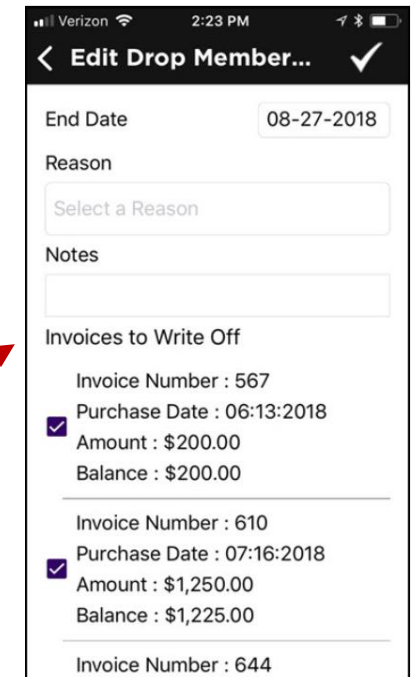
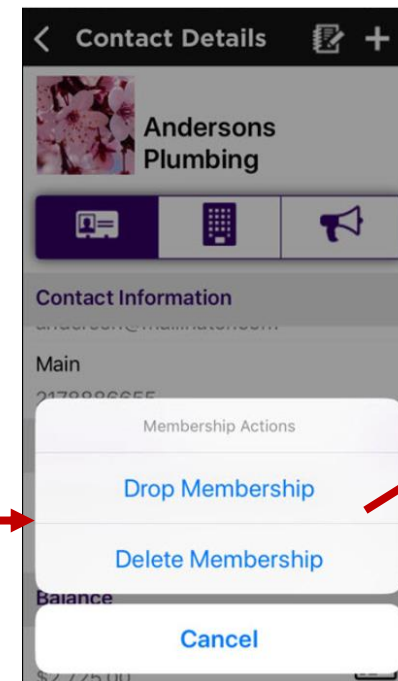
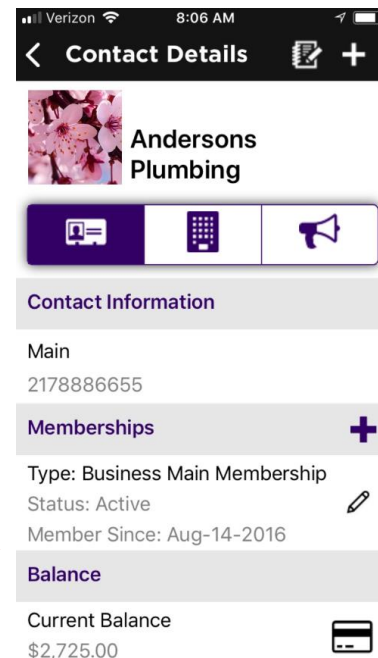
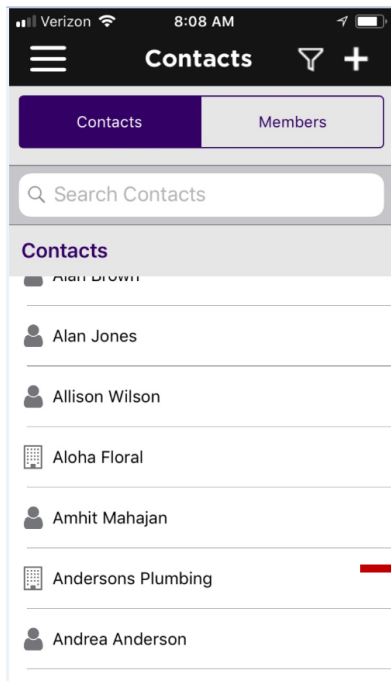
# Using the Staff App for Contact Management

## WIKI: [Add A Membership](#)



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](#)

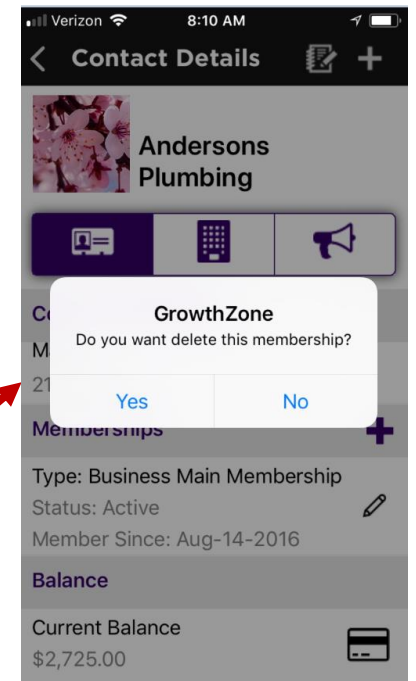
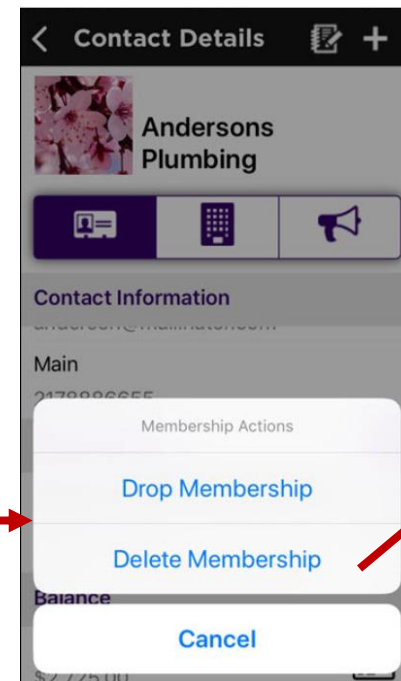
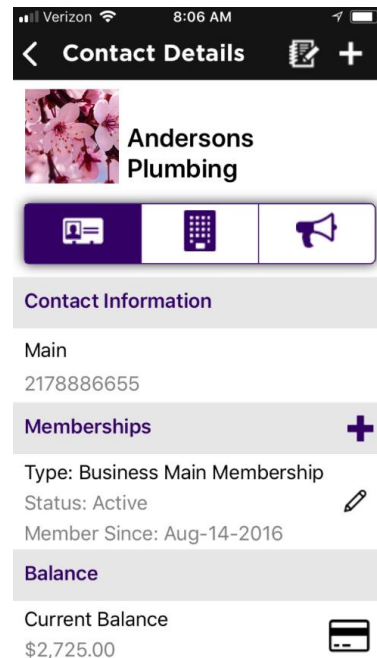
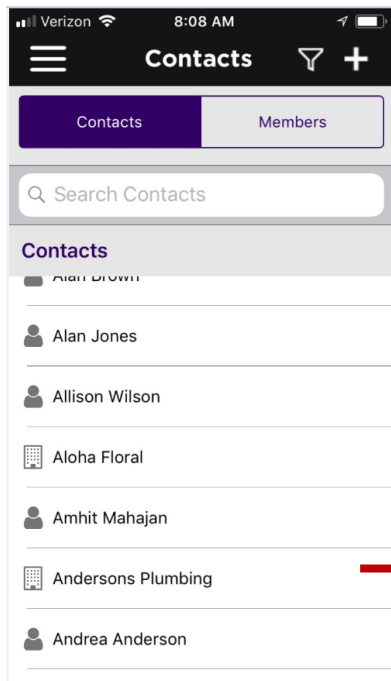




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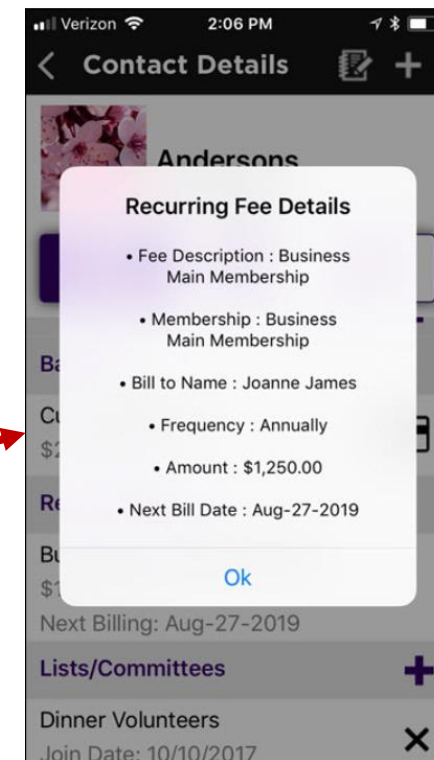
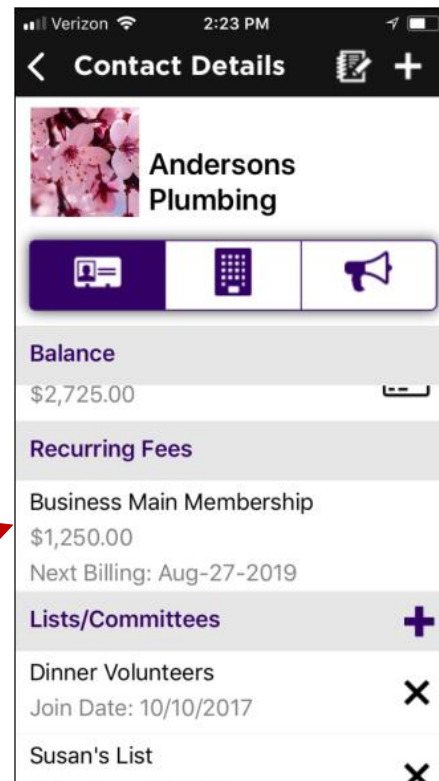
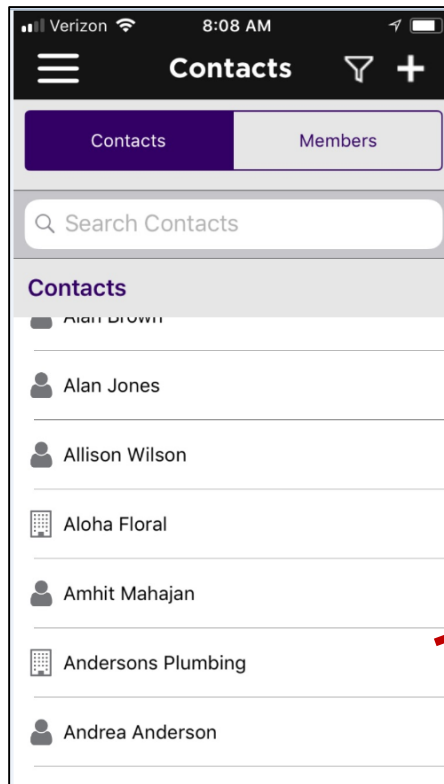
WIKI: [Delete a Membership](#)



# Using the Staff App for Contact Management GrowthZone smarter association software

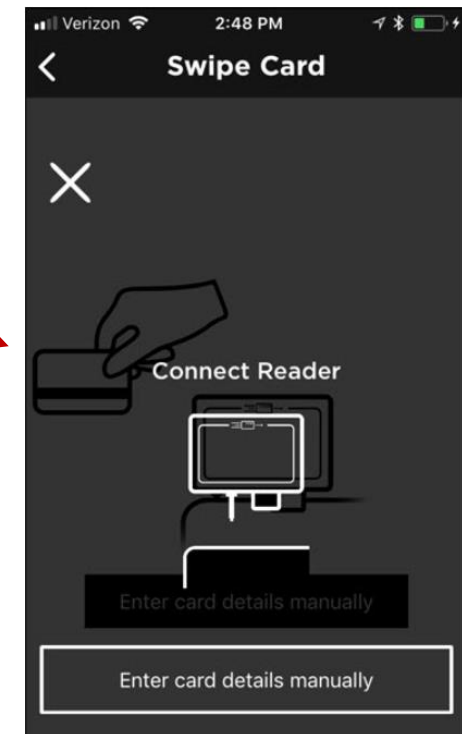
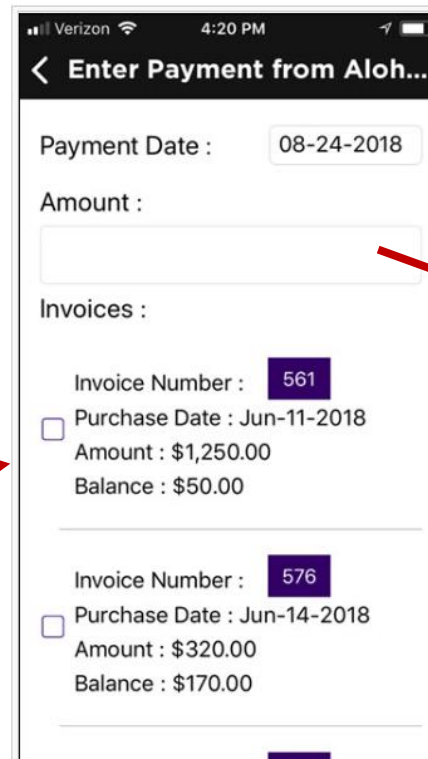
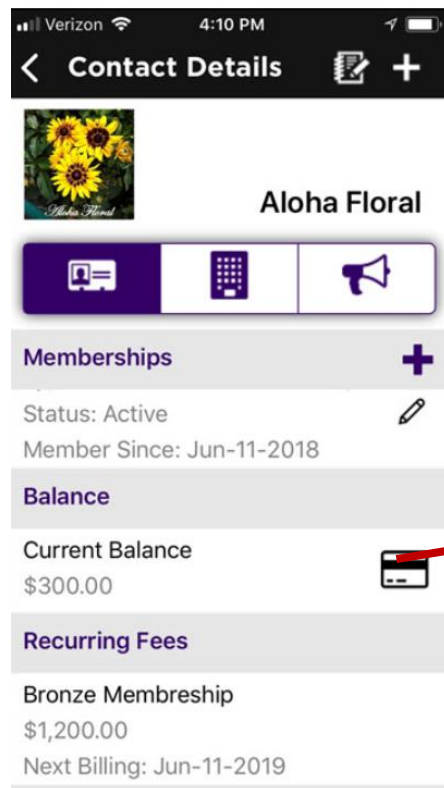
You can view a contacts recurring fee schedule

WIKI: [View Recurring Fee Schedule](#)



# Using the Staff App for Contact Management GrowthZone smarter association software

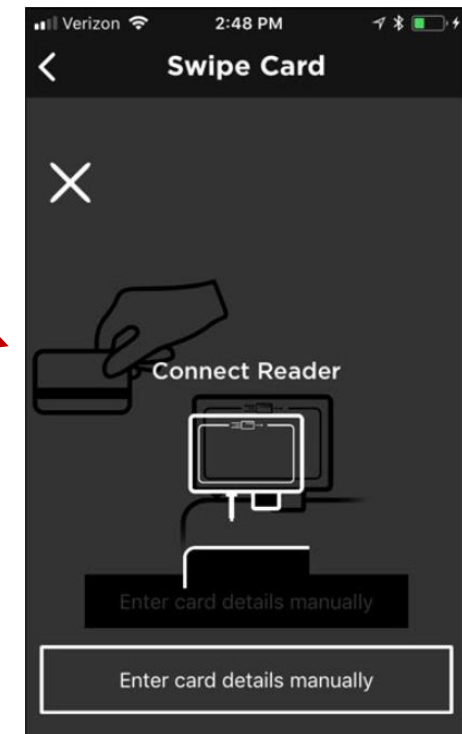
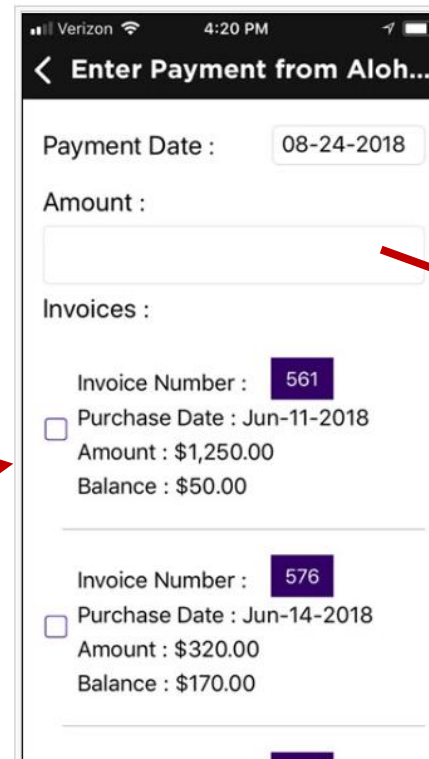
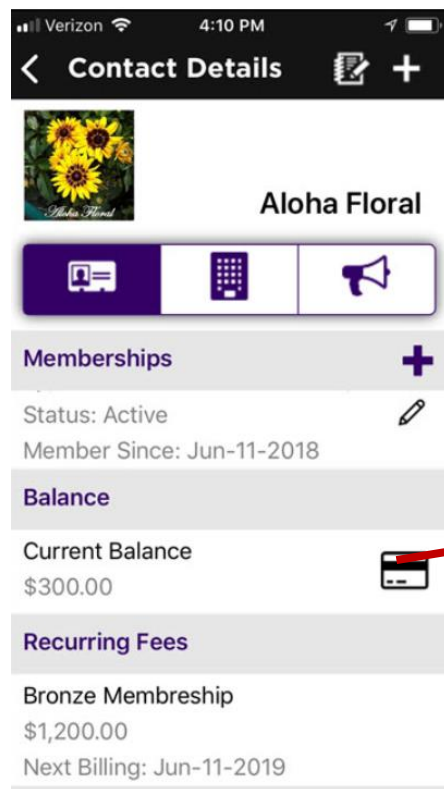
Using the staff app, you can easily view a contact's open invoices, and, if using **GrowthZone Pay** accept credit card payment for open invoices. WIKI:  
WIKI: [View & Manage a Contact's Balance](#)



# Using the Staff App for Contact Management GrowthZone smarter association software

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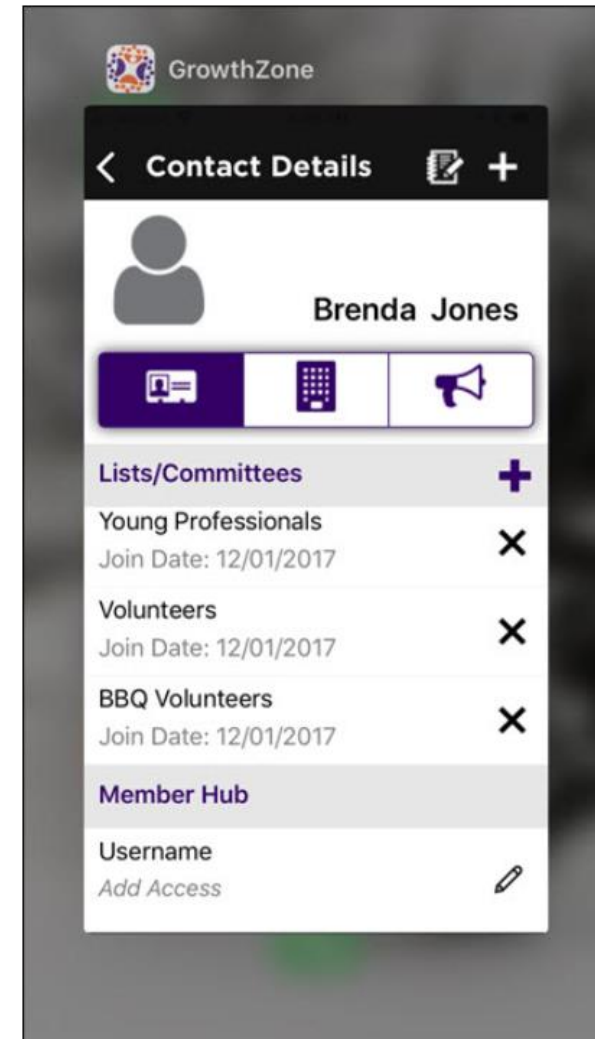
WIKI: [View & Manage a Contact's Balance](#)



# Using the Staff App for Contact Management

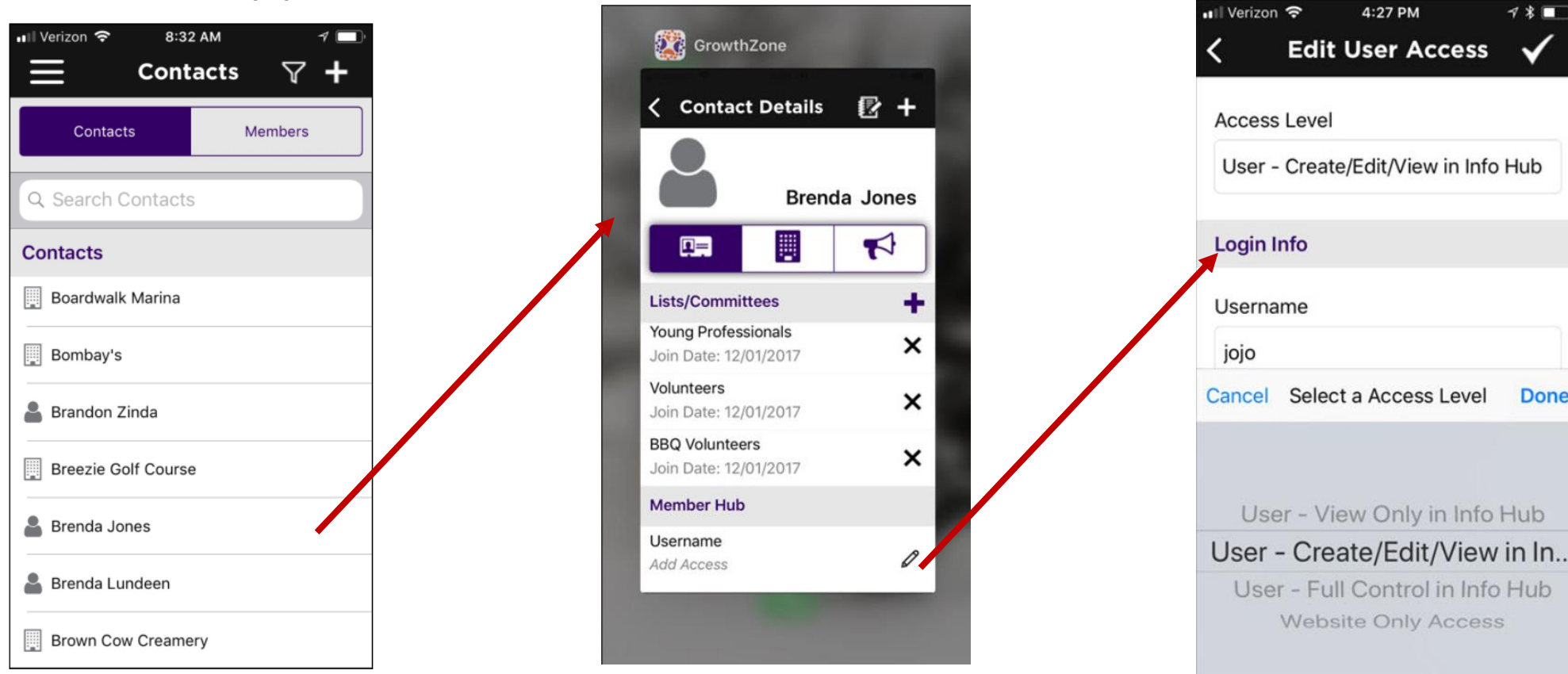
Using the Staff App you can change a user's access level to the Hub, send a user the login instruction email, send a password reset email or manually reset a password

WIKI: [Manage Info Hub Access](#)



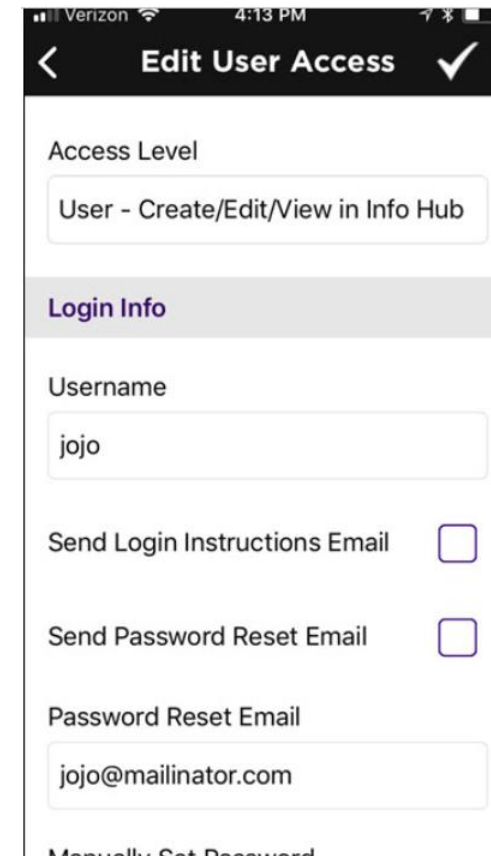
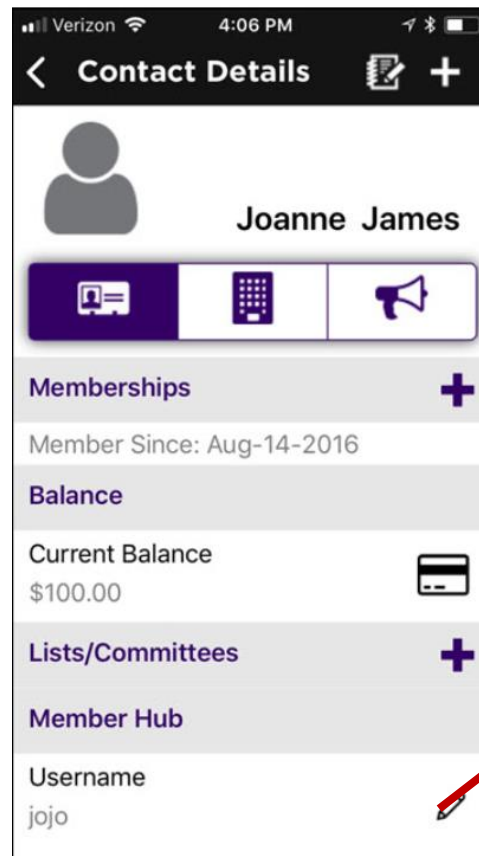
# Using the Staff App for Contact Management

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



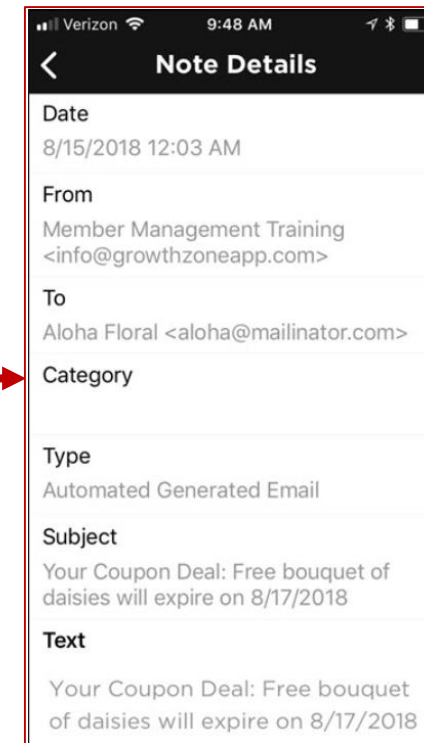
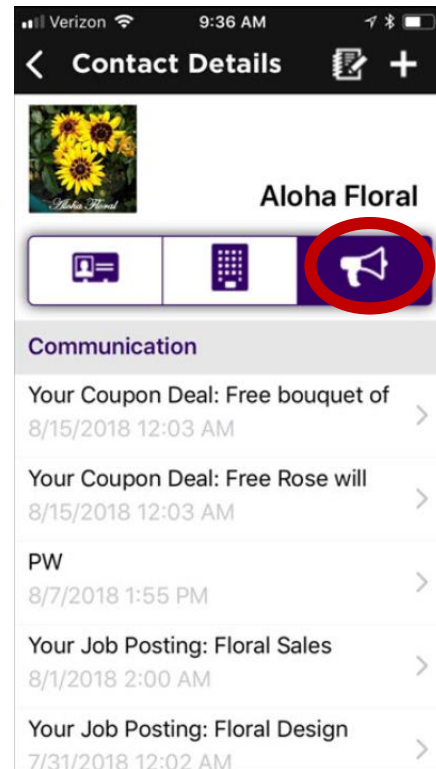
# Using the Staff App for Contact Management GrowthZone smarter association software

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)



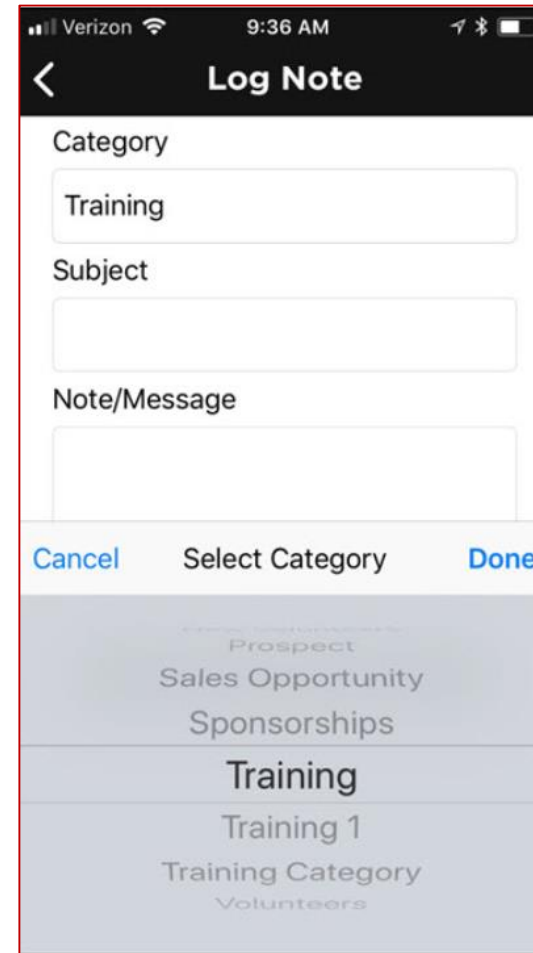
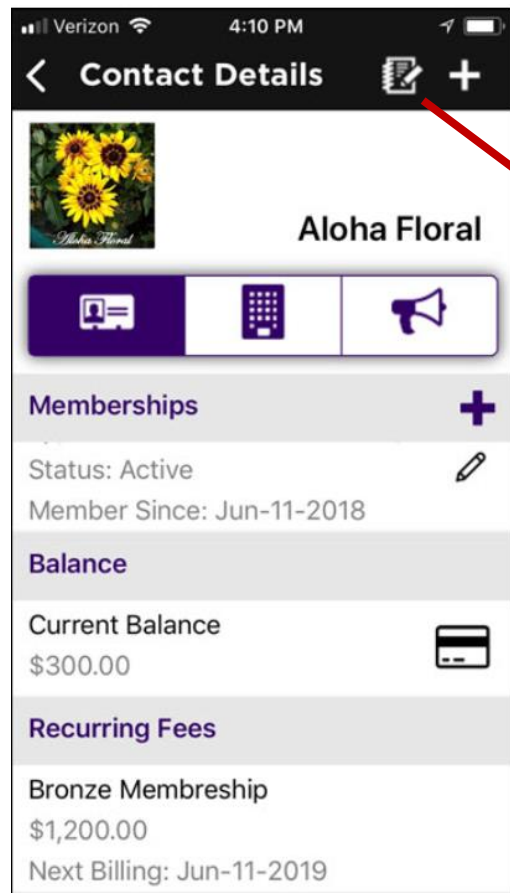
Using the staff app, you can review communications, log notes, and send emails to your contacts 

WIKI: [Managing Communications](#)





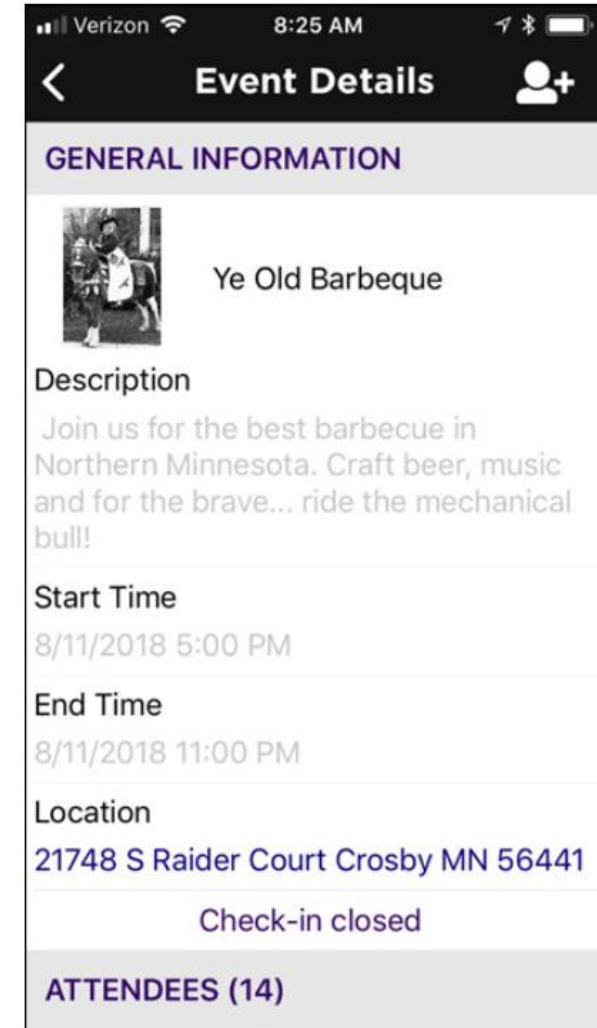
You can easily log notes



# Managing Events with the GrowthZone App

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

WIKI: [Managing Events](#)



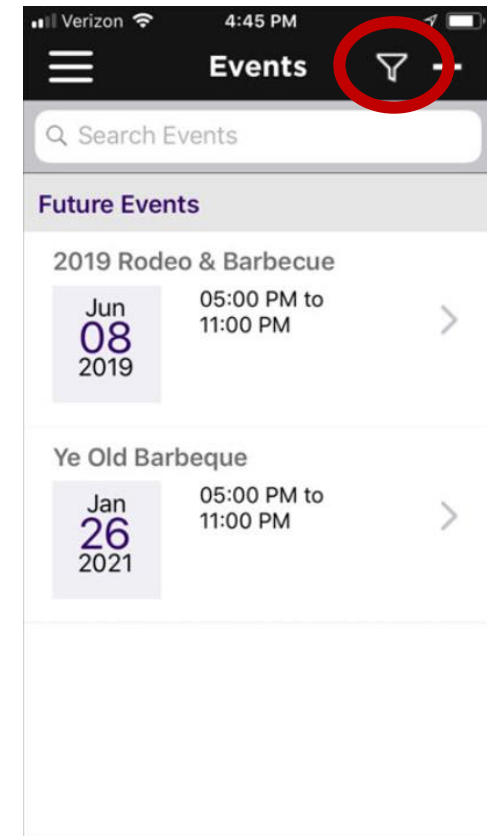
# Managing Events with the GrowthZone App

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.

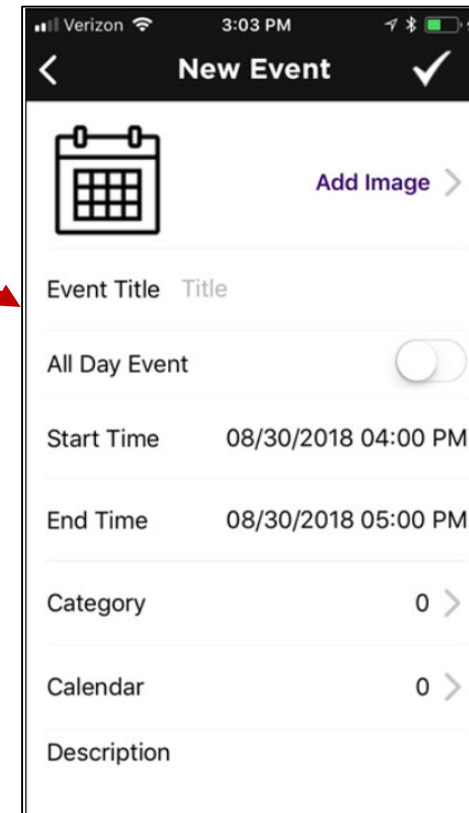
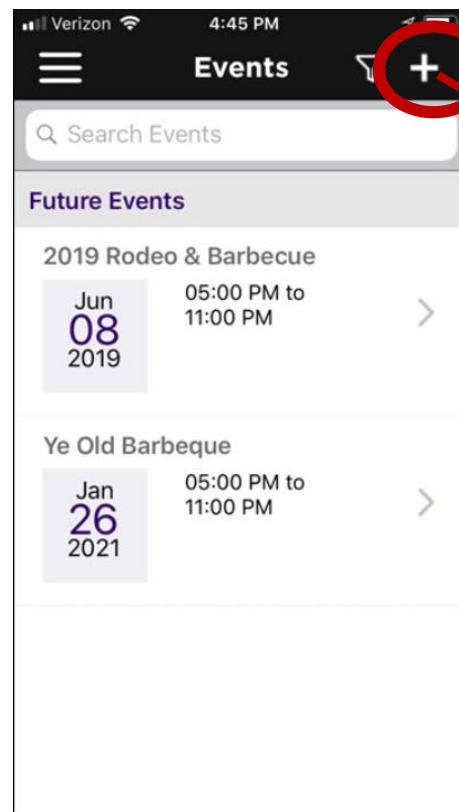
WIKI: [View Events](#)



# Managing Events with the GrowthZone App

Using the App you can easily add events

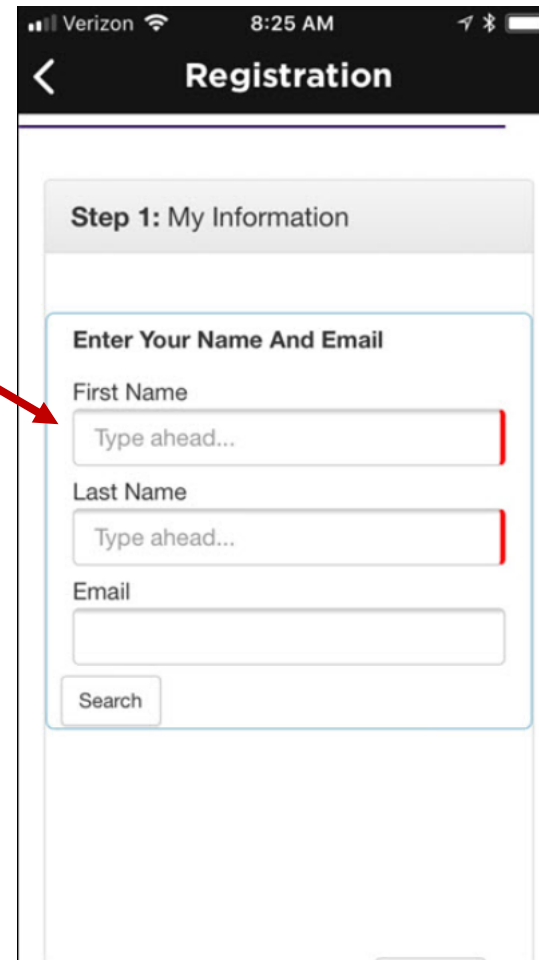
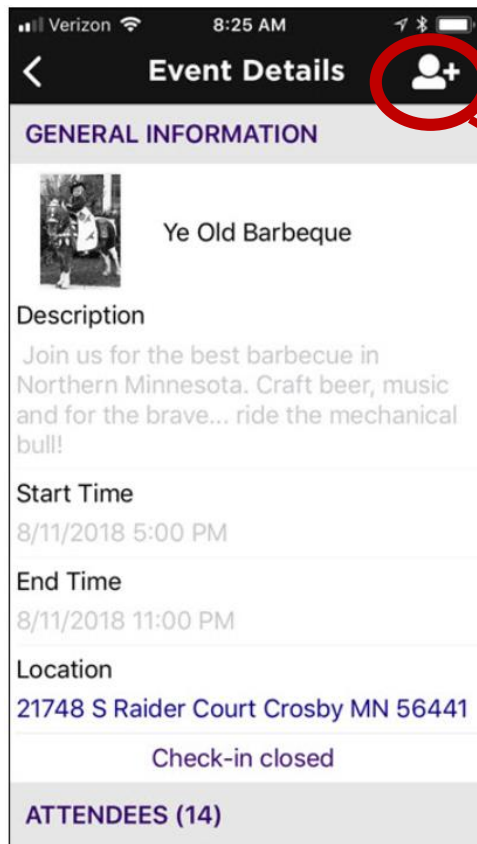
WIKI: [Add an Event](#)



# Managing Events with the GrowthZone App

You can easily add registrations to an event...

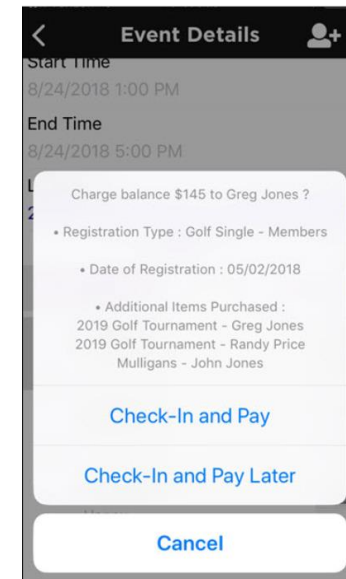
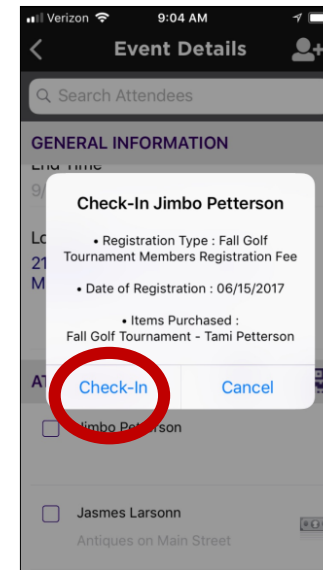
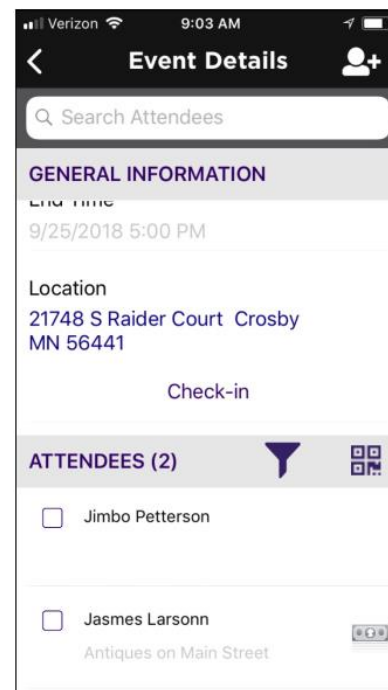
WIKI: [Add Registrations](#)



# 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

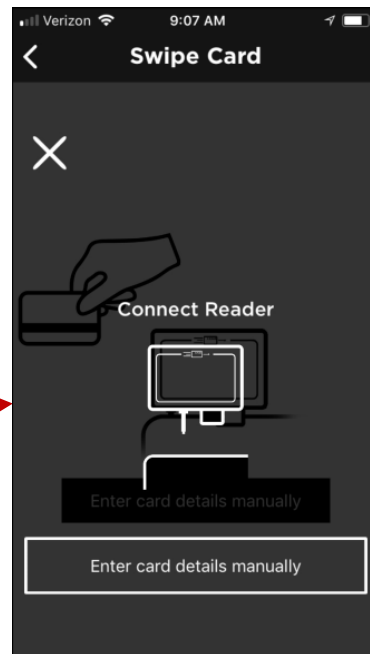
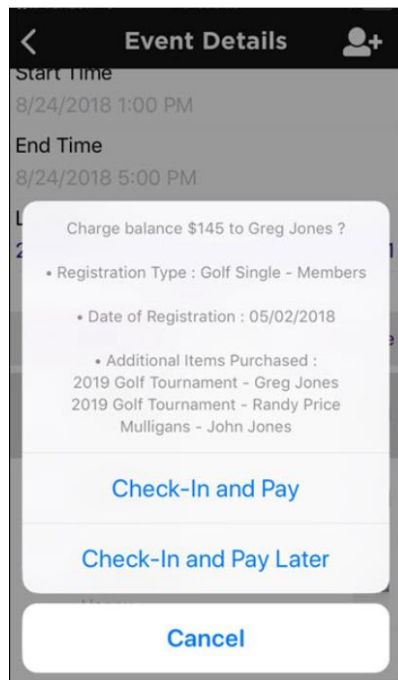
WIKI: [Checking in Event Attendees](#)



# 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](http://posguys.com)

## [Shuttle](#)



*For iPhones without an audio jack:*

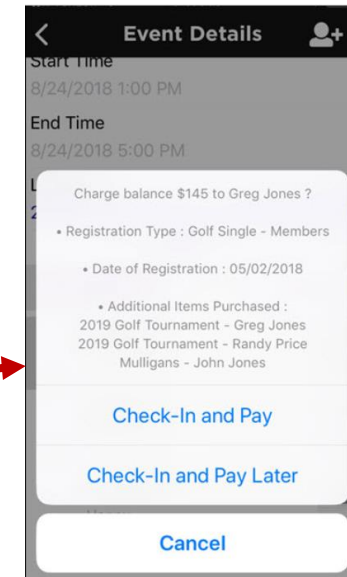
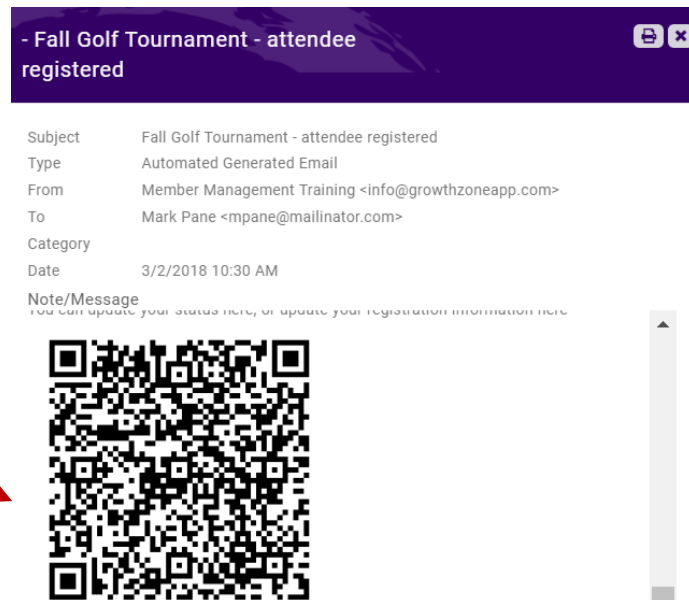
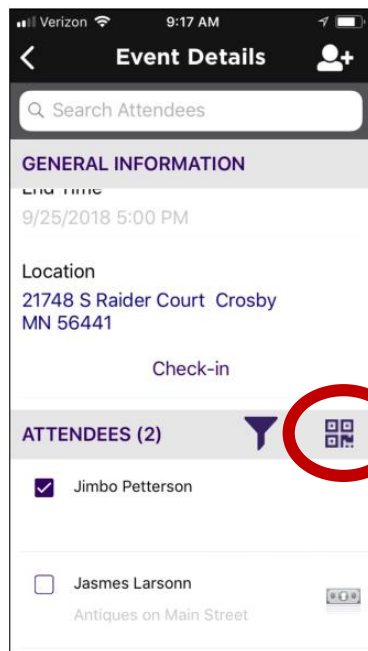
## [iMag Pro II](#)



# 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](#)

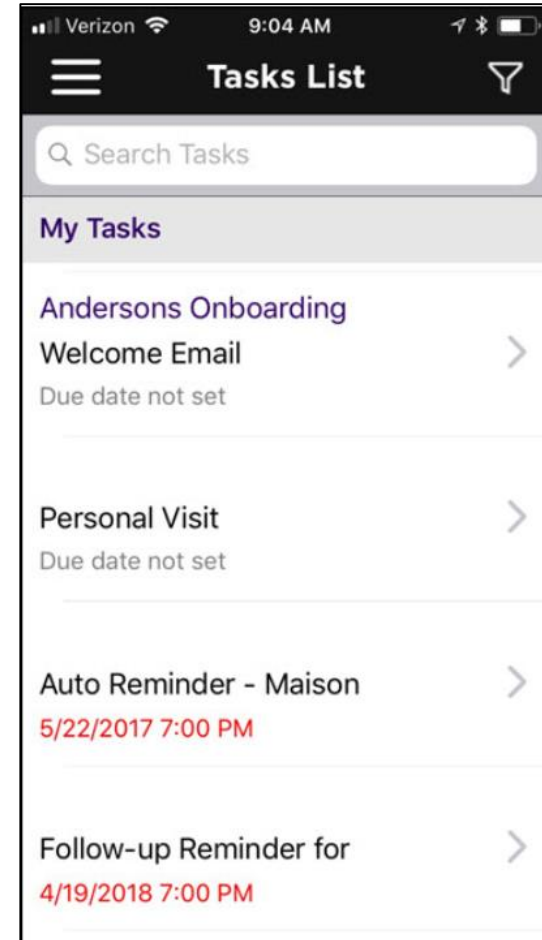




# Reviewing and Managing Tasks

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.

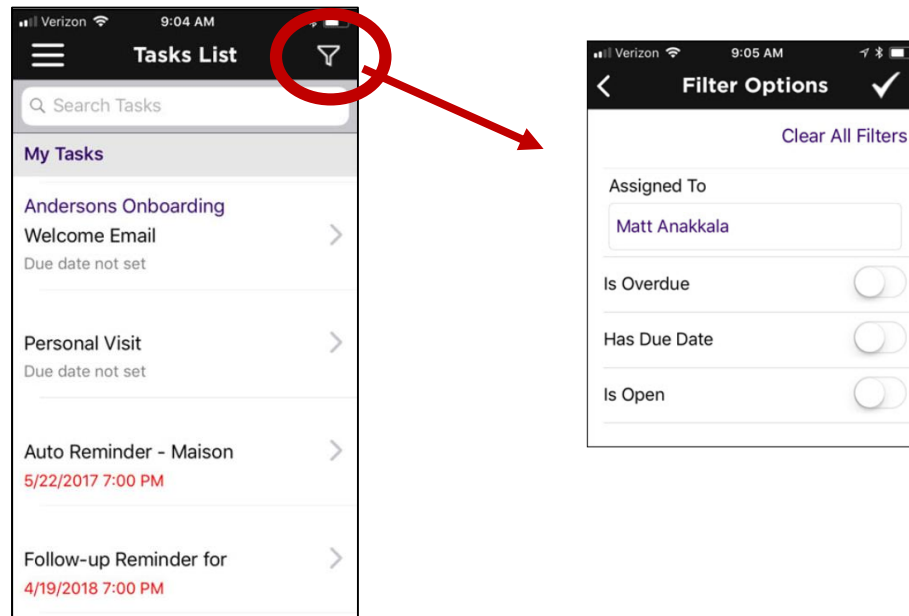
WIKI: [Reviewing & Managing Tasks](#)



# Reviewing and Managing Tasks

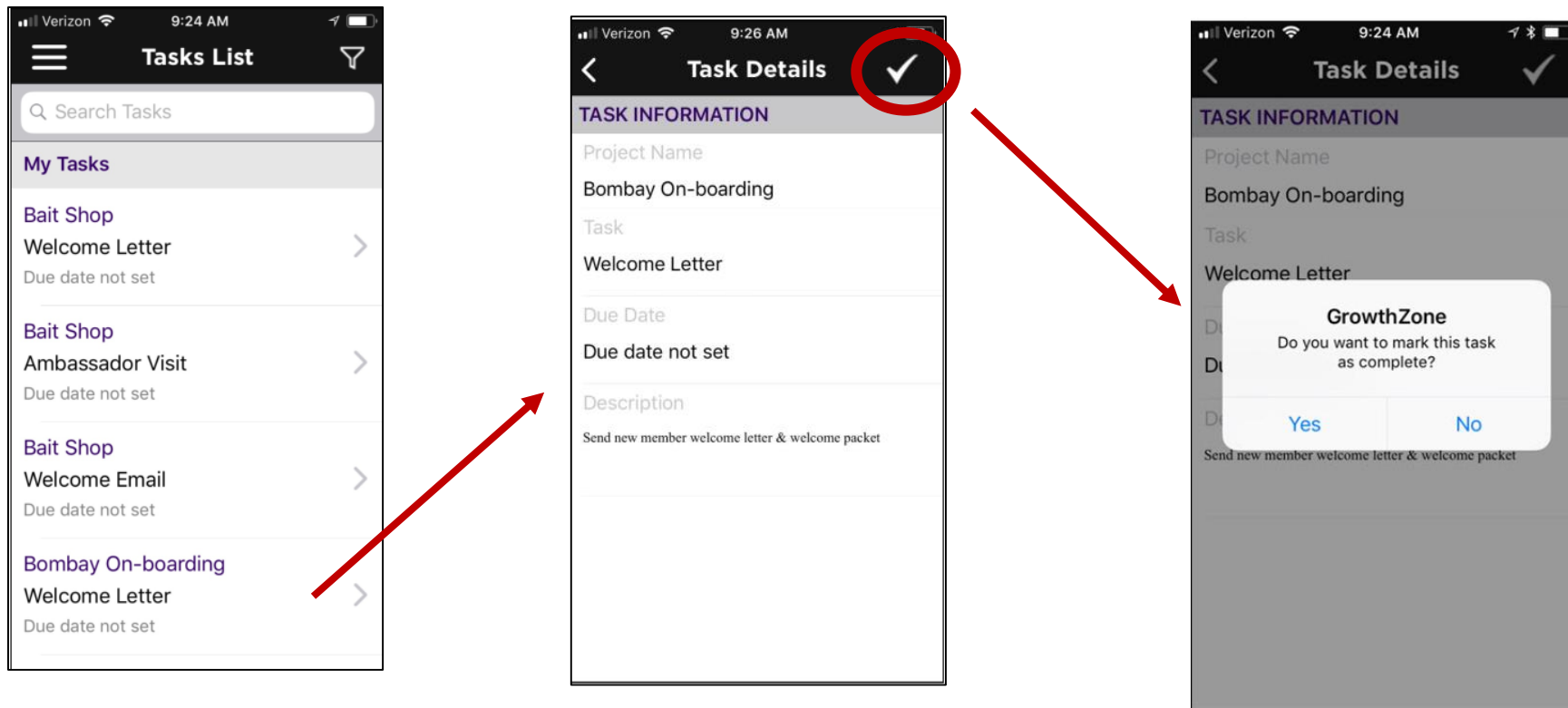
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WIKI: [Reviewing & Managing Tasks](#)



# Reviewing and Managing Tasks

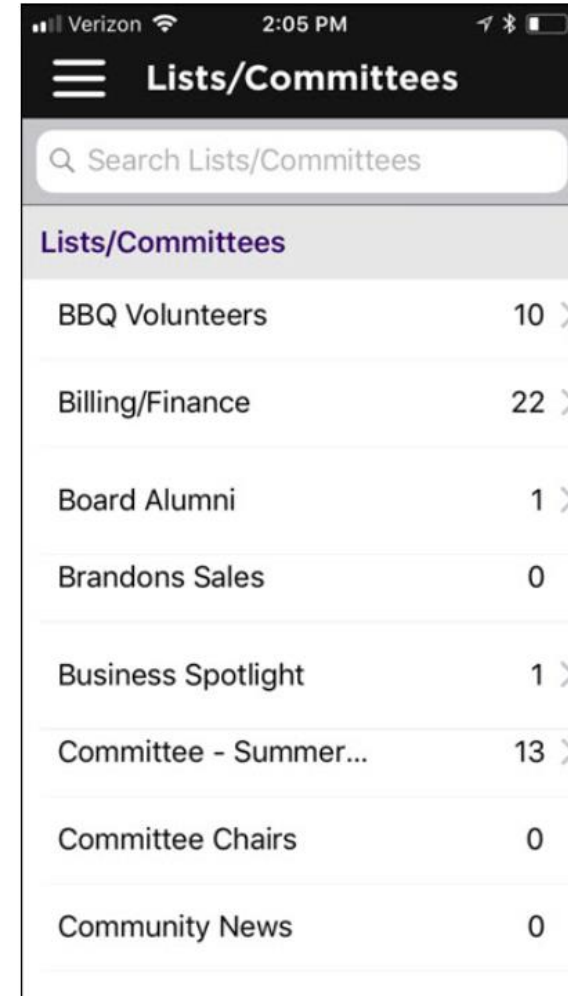
Easily review task details & mark tasks as completed



# Managing Lists/Committees

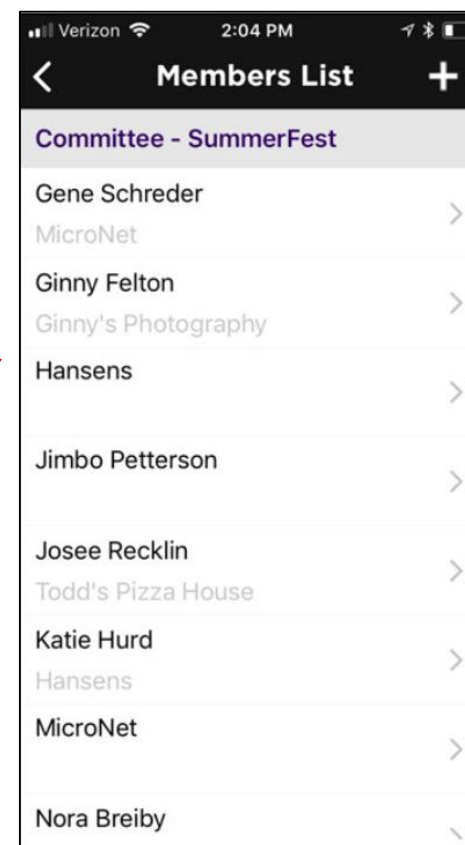
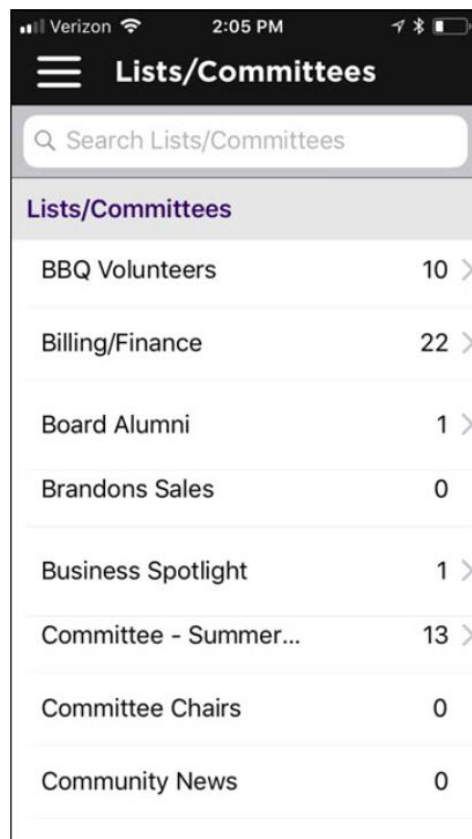
Using the Staff App, you can easily view all of the contacts in a list/committee, add contacts to a list/committee and remove contacts from lists/committees

WIKI: [Managing Lists/Committees](#)



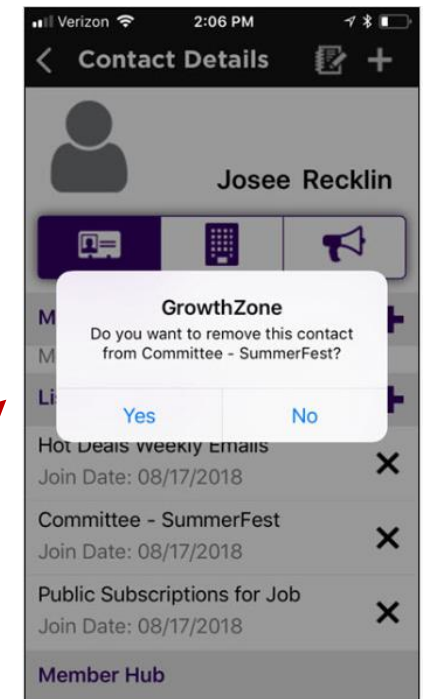
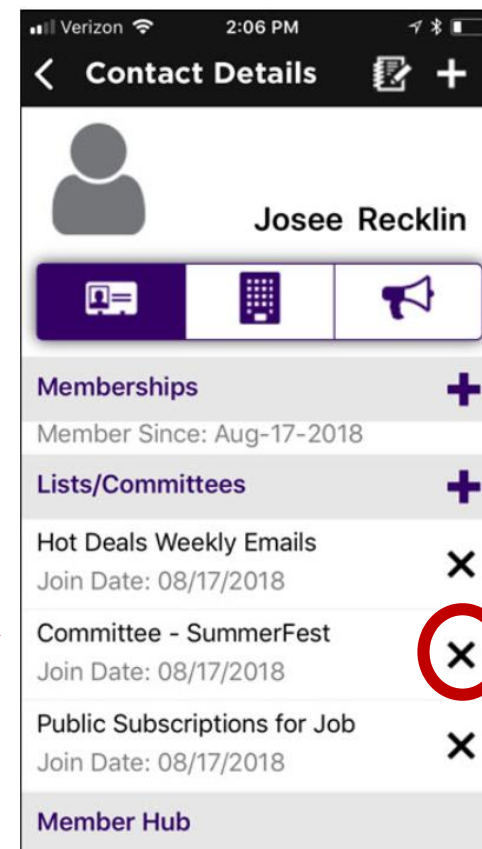
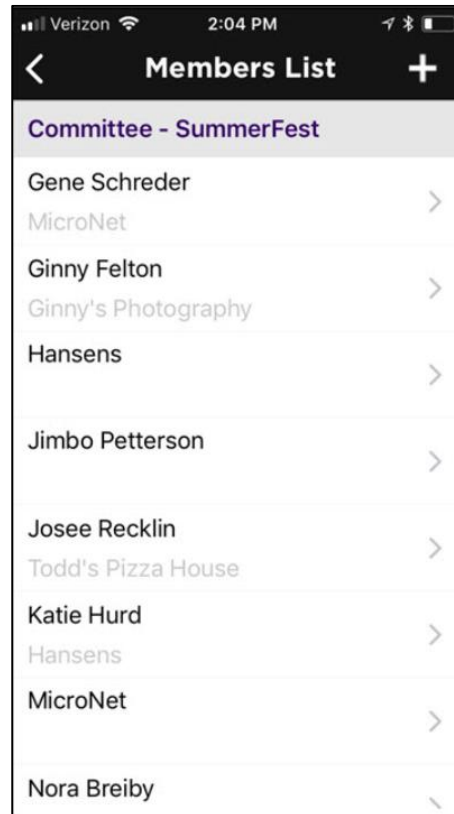
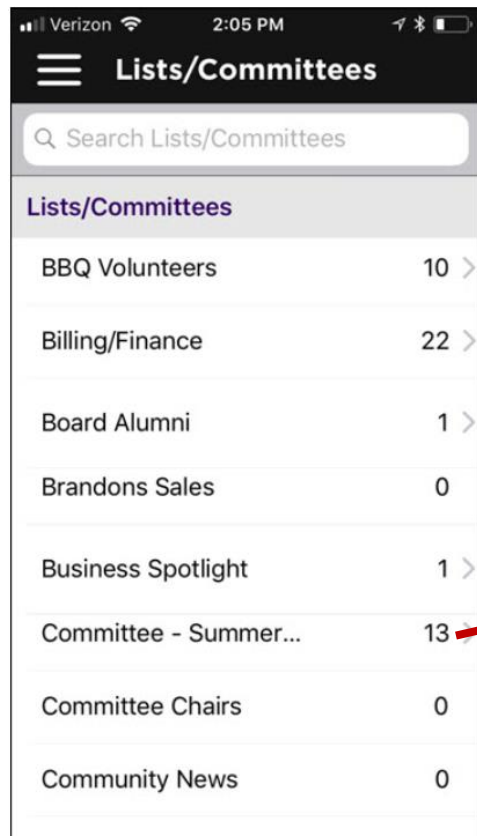
# Managing Lists/Committees

View the list/committee roster...



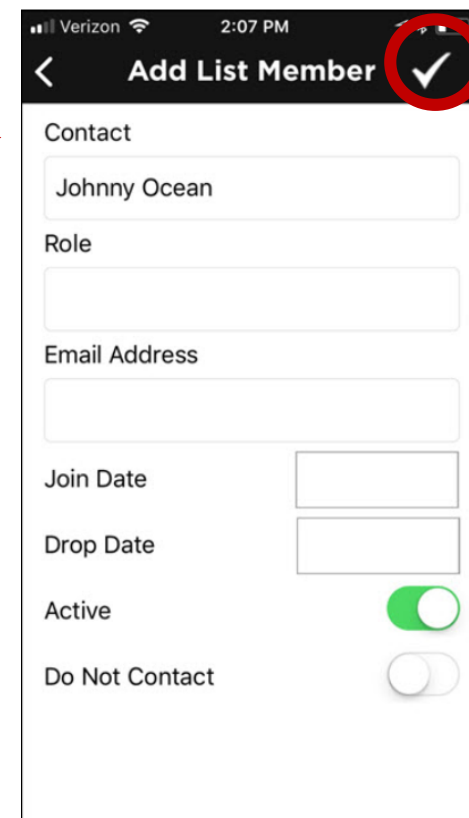
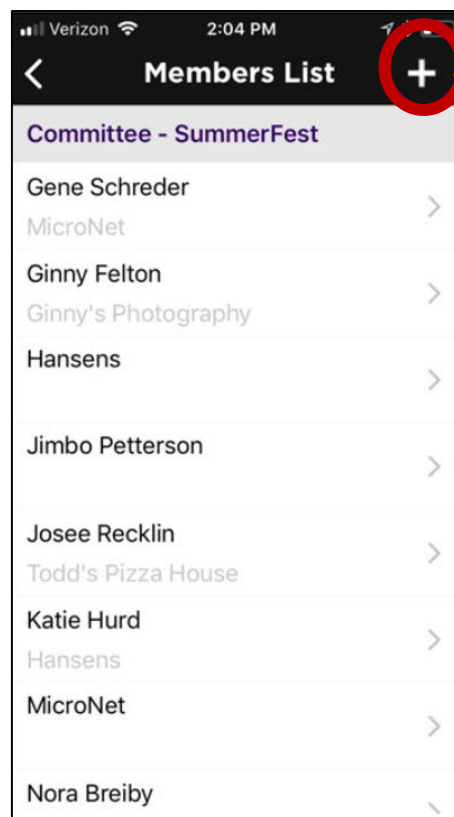
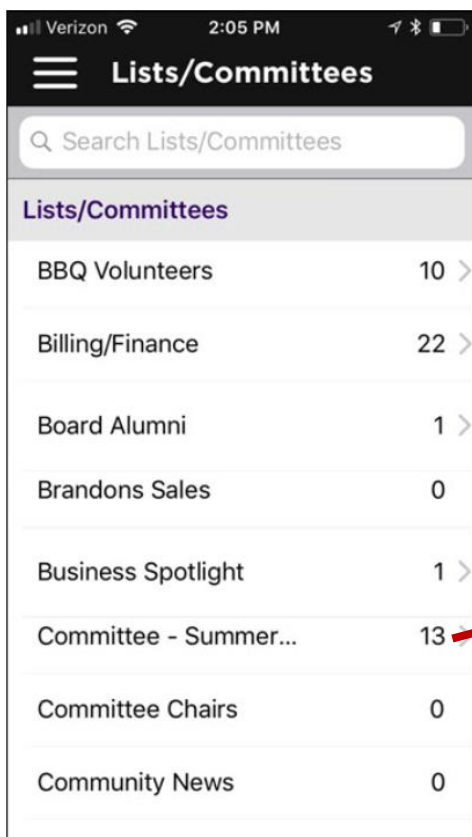
# Managing Lists/Committees

## Remove Contact from List/Committee Roster...



# Managing Lists/Committees

Add a Contact to a List/Committee...



Questions?