



Premium Staff App

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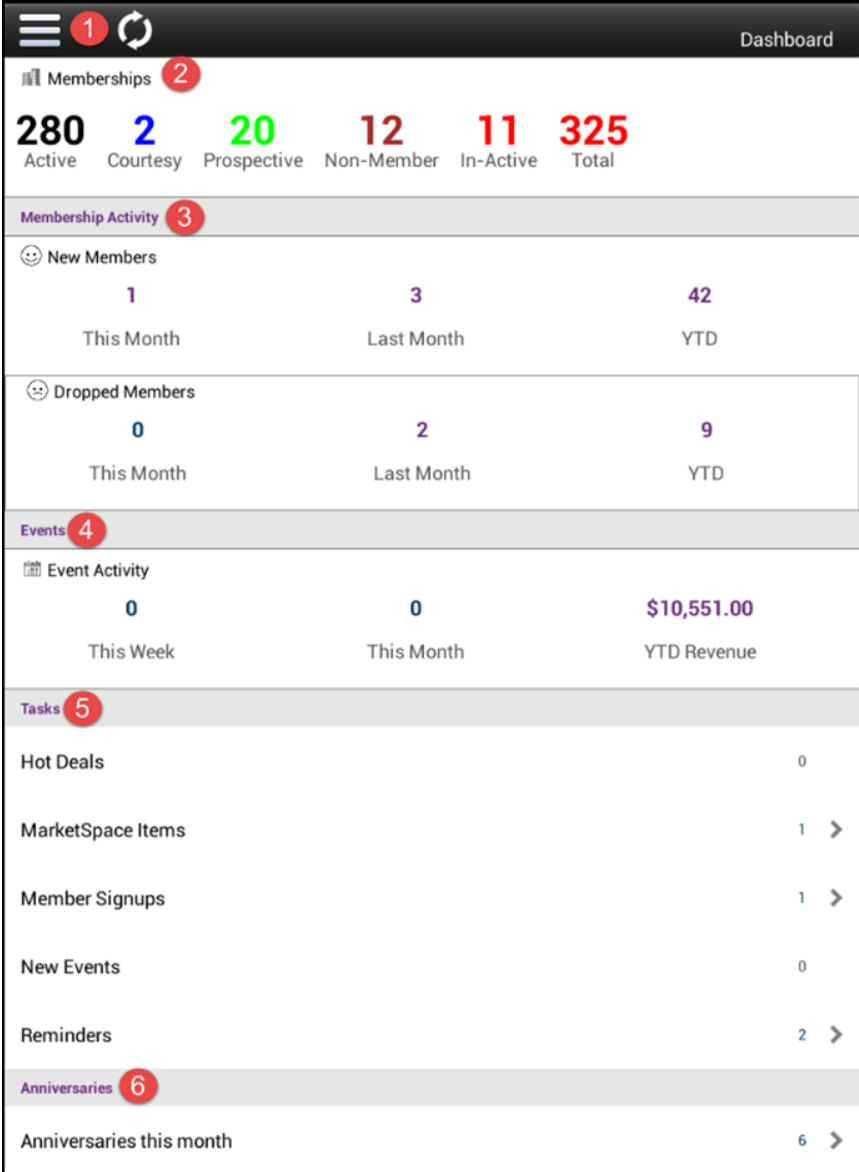
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Dashboard Overview

1. **Menu options** – This opens the list of available options within the app.
2. **Membership** – This is the current number of member records within each status.
3. **Membership Activity** – Shows the New and Dropped members as of that moment along with a year to date total. If you tap on the number it will show you the member(s) that make up the total.
4. **Event Activity** – Shows the number of events for the week, the month, and YTD. If you tap on the number it will show you the events that make up the total.
5. **Tasks** – This is a list of items that have been assigned to you within the database that need your review and approval.
6. **Anniversaries** – This is a list of members that have a join date in the current month.



Community Feed Overview

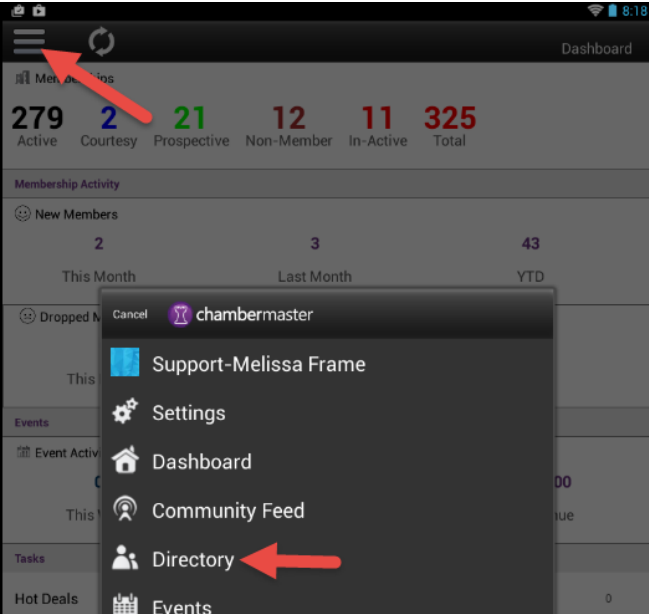
1. **Refresh** the feed to show the most up to date posts.
2. **Post** a comment or photo to the Community Feed.
3. **Feed** – This area allows you to View comments or photos from other members. You are able to comment or like a post from here. (You also have the ability to remove or edit posts made by members.)

The screenshot displays a mobile application interface for a community feed. At the top, there is a dark navigation bar containing a menu icon on the left, a refresh icon with a red notification bubble containing the number '1', the word 'Feed' in the center, and a 'Post' button with a red notification bubble containing the number '2' on the right. Below the navigation bar, the feed consists of five vertically stacked post cards. Each card features a profile picture of a dog and the name 'Mickie Cat' with the handle 'Magnificent Mutts'. The posts are as follows:

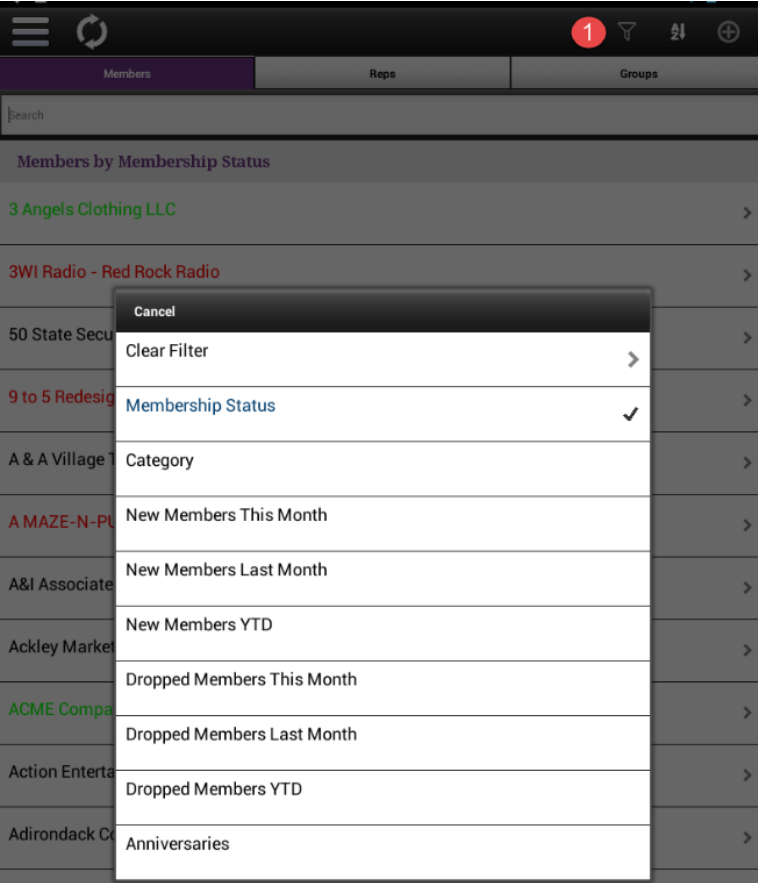
- Post 1:** Text: "I love the new display in my window. Stop by and take a look". Includes a 'Status Update!' icon. Shows '1 Likes' and '0 Comments'. Dated '12/8/2015'. Interaction buttons: 'Like' and 'Comment'.
- Post 2:** Text: "Lunch Special 10% off burger basket". Includes a 'New Hot Deal added!' icon. Shows '0 Likes' and '0 Comments'. Dated '11/24/2015'. Interaction buttons: 'Like' and 'Comment'. A red notification bubble with the number '3' is overlaid on this post.
- Post 3:** Text: "Doggie washer". Includes a 'New Job Posting!' icon. Shows '0 Likes' and '0 Comments'. Dated '11/17/2015'. Interaction buttons: 'Like' and 'Comment'.
- Post 4:** Text: "Holiday Gift Wrapping". Includes a 'New Hot Deal added!' icon. Shows '0 Likes' and '0 Comments'. Dated '11/17/2015'. Interaction buttons: 'Like' and 'Comment'.
- Post 5:** Text: "Welcome Mack's Garage.". Includes a 'Status Update!' icon. Shows '0 Likes' and '0 Comments'. Dated '10/14/2015'. Interaction buttons: 'Like' and 'Comment'.

Directory Overview

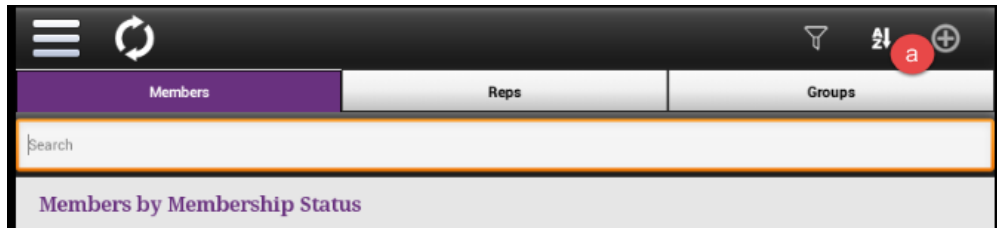
- 1. From the **Dashboard** tap **Directory**



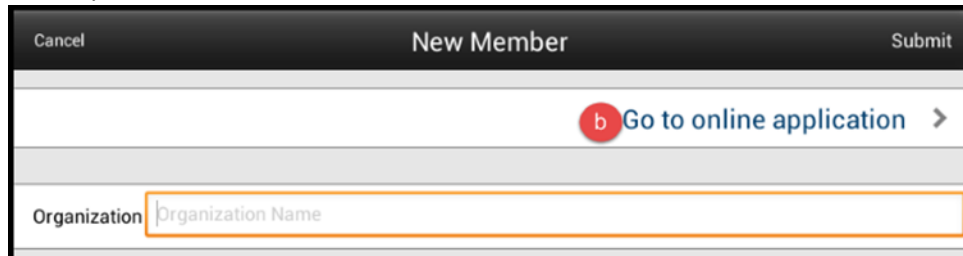
- 2. **Filter Options** – This allows you to filter the directory to see the exact members you would like to work with.



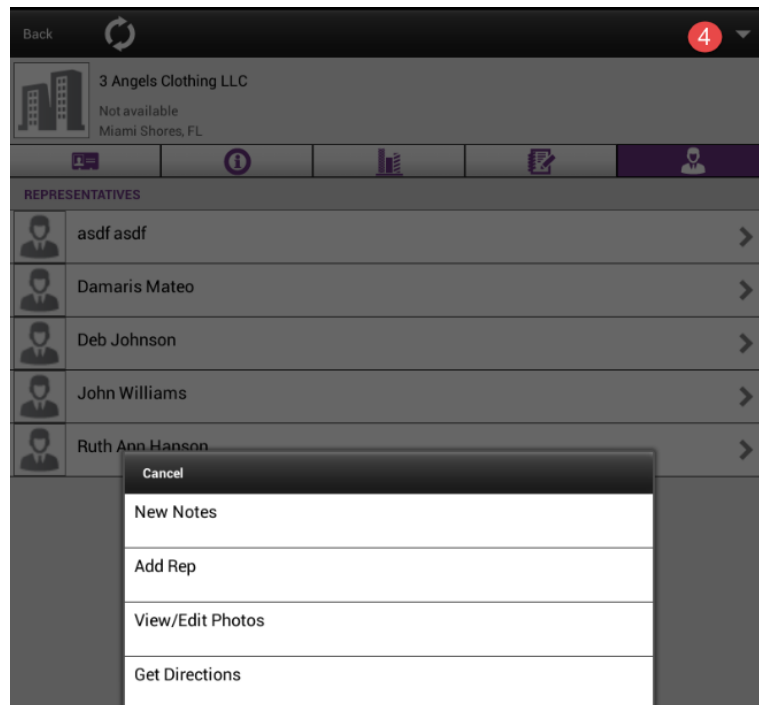
3. Add a new record to the database using the app.
 - a. To add in a member record you can tap the **plus** sign and enter the information in to the fields. (If invoices need to be created this is done within the full database.)



- b. If you would like to enter in a new member and capture credit card information tap on the **Plus** sign then tap on the **Go to online application**. This will open up a mobile friendly version of the member application for you to complete then choose the payment option.



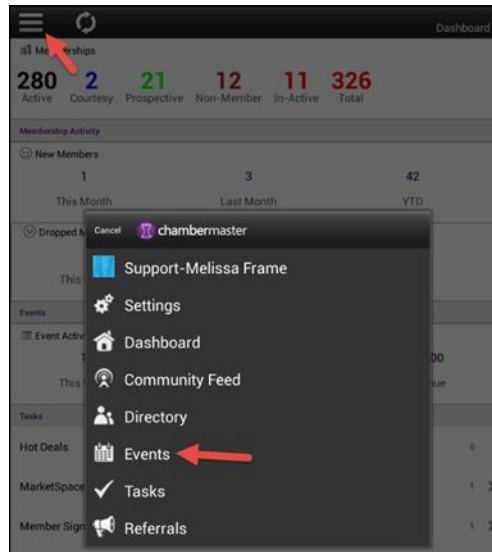
- c. When you use the Member Application option they will show as a prospective member in the task list and will need approval.
4. To work with a specific member record tap on their name in the **Directory**. From their file in the app you are able to update **General company information, Membership information, stats, Notes, and Rep information**.



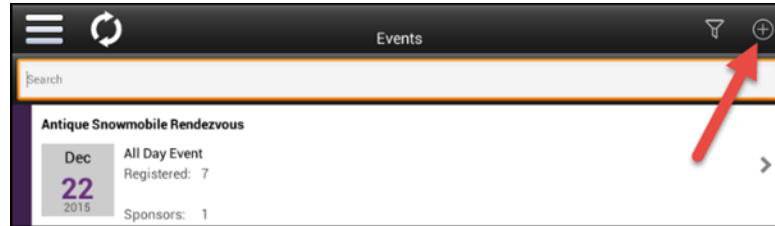
Events Overview

How to add an event from the app

1. From the **Dashboard** tap **Events**



2. In the upper right hand corner tap the **Plus** sign.



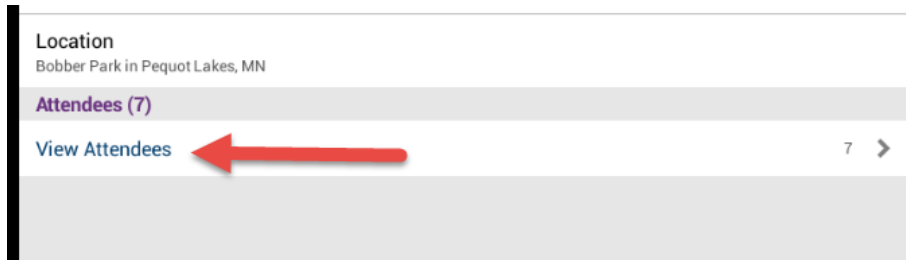
3. In the **New Event** page of the app you can enter in the basic information for the event.

A screenshot of the 'New Event' form. The form has a title bar with 'Cancel' on the left and 'Add' on the right. Below the title bar is a short instruction: 'Quickly post an event on behalf of one of your members. Or get your own event started and enhance it with additional photos, fees and sponsors in the backoffice software later. Events added are automatically approved.' The form contains several fields: a calendar icon with 'Add Picture >' next to it; an 'Event Title' field with the placeholder text 'Title'; an 'All Day Event' checkbox; 'Start Time' and 'End Time' fields both set to '12/22/2015 12:00 AM' with right-pointing arrows; a 'Description' field with the placeholder text 'Description'; and a 'Visibility' field with 'Add / Remove' and a right-pointing arrow.

4. Tap **Add** to finish.

How to add in a new event registration from the app

1. From the **Dashboard** tap on **Events** and find the event you would like to add a registration to.
2. Once you are in the Event tap the link **View Attendees**



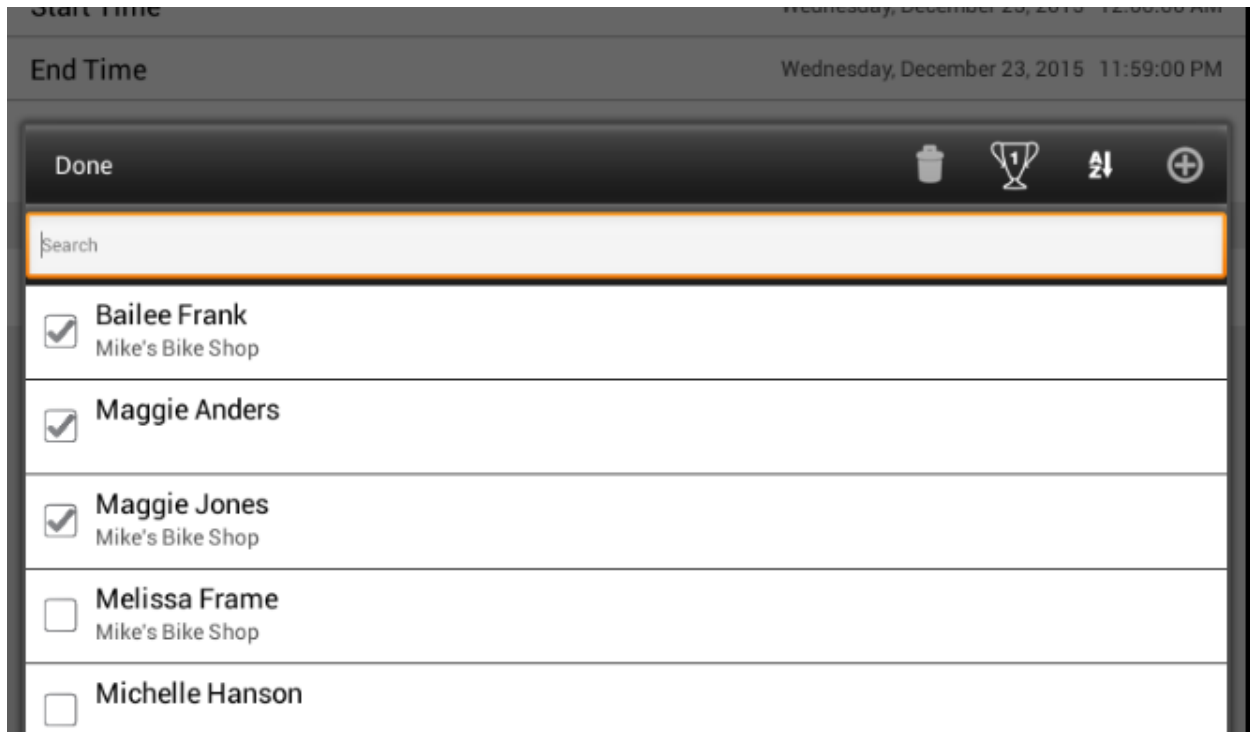
3. On the list of registrants tap the **Plus** symbol in the upper right hand corner. This will redirect you to your event registration on your mobile device.



4. Register them as a member or as a non-member. (If you register a member as a non-member you can associate them to a member record in the database)
5. Complete the registration process
6. If there is a fee to register you are able to take the credit card payment or create an invoice

Checking in attendees at an event (available the day of the event)

1. From the **Dashboard** go to **Events** and find the event you will be working with.
2. Once you are in the event tap **View Attendees**
3. This will pull up the list of attendees sorted alpha by first name (the sort order can be changed to Member Name or Attendee Status)
4. As people come to the event tap the box to the left of their name. This will mark them as attended for the event.



Record payment from the Premium Staff App for events

- 1. From the Dashboard find the event you would like to with.
- 2. Once you are in the event tap **View Attendees**
- 3. When you are in the list of attendees you will see a **Dollar Symbol** next to the attendees that have an open balance.

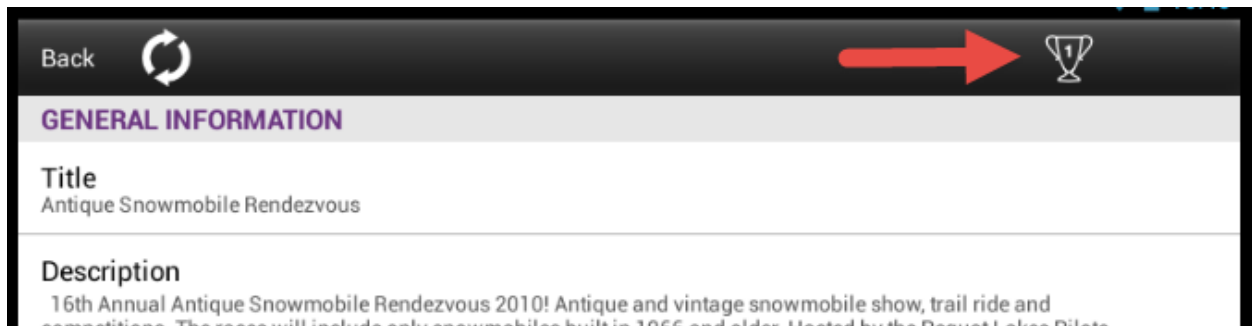


- 4. When you tap on the dollar icon the payment window will open. In the payment window you may record the details of the payment. If the attendee would like to pay with a credit card the payment would need to be processed outside of the app and the payment details are recorded in the app.



Pick a Random Winner

1. From the **Dashboard** tap **Events**
2. Find the event you would like to work with
3. In the upper right hand corner you will see a **Trophy** icon. When you tap this icon it will pick a random winner from the attendee list. It will only choose from the attendees that have been checked in



Task Overview

The task list allows you to view and approve **Hot Deals**, **Market Space** items, **Member Signups**, **New Events** and review **Reminders**.

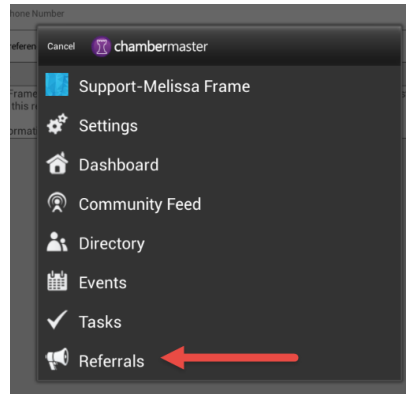


Task List	
Hot Deals	0
MarketSpace Items	1 >
Member Signups	1 >
New Events	0
Reminders	2 >

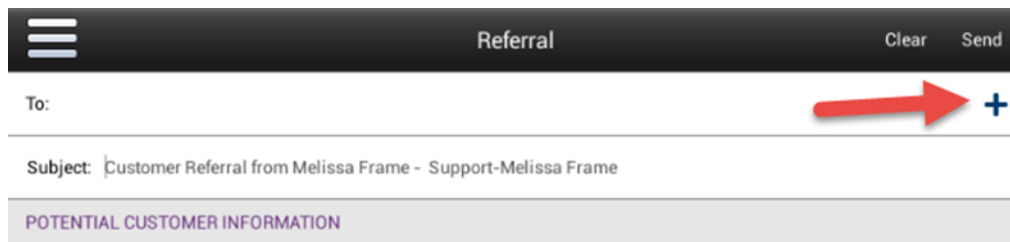
Send an eReferral using the Premium Staff App

Referrals is a way for you to send customer information to a specific group of members. It is a way to open the communication up between the customer and your members.

1. From the **Menu** option tap Referrals



2. In the **To:** box tap the **Plus** sign to choose the members you would like to send to. You can search your members list by **Member, Reps or Category.**



3. Enter in the **Customer Information**

A screenshot of the 'Customer Information' form in the Premium Staff App. The form has a grey header with the text 'POTENTIAL CUSTOMER INFORMATION'. Below the header, there are three input fields: 'Name: Customer Name', 'Email: Email Address', and 'Phone: Phone Number'. A red box highlights these three fields. Below the input fields, there is a 'Contact Preference' field with an 'Email' button and a right-pointing arrow.

4. Edit the **Message** if there is special instructions for contacting the customer

A screenshot of the 'Message' field in the Premium Staff App. The field has a grey header with the text 'MESSAGE'. Below the header, there is a text area containing the message: 'Melissa Frame - Support-Melissa Frame was pleased to refer your business to a potential customer today. We hope this referral develops into future business for you. More information about the customer request and contact information can be found below.'

5. When ready to submit tap **Send**

