Premium Staff App
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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.)
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.)

   ![Image of members page]

   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.

   ![Image of online application]

   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.

   ![Image of directory entry with options]

Events Overview

How to add an event from the app

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

![Dashboard screenshot](image1)

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

![Events screen](image2)

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

![New Event screen](image3)

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.
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

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

5. When ready to submit tap Send