



# *Vanco Mobile*

# *User Guide*

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**VANCOPAYMENTS.COM**

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## Getting started

Vanco Mobile will send you a text message inviting you to join an organization. The invite includes a link to launch and install Vanco Mobile from the Apple App Store or the Google Play Store, depending on the type of phone you have. Getting started is just a matter of tapping the invite link and following the screen prompts, you'll be up and running in no time.

### Download and install the application

**NOTE:** If you received a text invite, you don't have to search for Vanco Mobile. The invite contains a link taking you right to the Vanco Mobile app in your app store. These steps are for those who do not have an invite or a direct link to the Vanco Mobile app installation.

1. In your App or Play store, search for Vanco Mobile .
2. Tap the Vanco Mobile app or tap **Install**.
3. Follow the screen prompts to complete the install.

When you open Vanco Mobile, you are on the **Groups & Chat** screen.

### App Navigation

To move between areas in Vanco Mobile, tap the applicable icon. To move within areas, for example, if you are a few taps into **Groups & chat**, use the back arrow to return to the previous screen.



Icon	Function
	<b>Groups &amp; chat</b> – view and manage your groups and chat messages.
	<b>Calendar</b> – view and manage your events.
	<b>Donate</b> – link to an existing Web Pay or GivePlus Online site, if your organization has one configured.
	<b>Directory</b> – view a listing of organization members. Send a chat message to one of the members.
	<b>Inbox</b> – displays invites to groups and broadcast messages from your administrator.

## Set up your profile

Initially, your profile has your name and phone number. You can add your email address, upload an image and set a couple options.

1. From any screen within Vanco Mobile, tap the bar menu .
2. Tap **My Profile**.
3. (Optional) Enter your email.
4. Select the options that you want:
  - a. **Hide me from directory**: If you don't want your name to show up in the directory, toggle this option on.
  - b. **Make phone number public**: If you want your phone number to display in the directory, toggle this option on.
  - c. **Make email public**: If you want your email address to display in the directory, toggle this option on.
5. (Optional) Add a picture or avatar of yourself.
  - a. Tap the image icon and choose the source where your picture resides.
  - b. Tap the picture. You can move the picture within the frame and use the slider at the bottom to zoom in or out.
  - c. When satisfied with the picture, tap the checkmark at the top right.
6. Tap **Save**.

## Sign out

1. From any screen within Vanco Mobile, tap the bar menu .
2. Tap **Sign out**.

## Switch between organizations

If you belong to more than one organization, you can quickly switch between them.

1. From any screen within Vanco Mobile, tap the bar menu .
2. Under your organization name, tap **Change** and select the organization.

## Leave an organization

1. From any screen within Vanco Mobile, tap the bar menu .
2. Tap **Leave organization**.
3. Confirm your selection by clicking **Yes**.

## Groups & Chat

You can create and join groups within your organization. A group can be open for anyone to join or restricted to selected people, the group owner makes that decision.

The **Groups & Chat** screen displays the groups you are part of, as well as any chat messages sent directly to you.

### Join a group

When you are invited to join a group, a notification is sent to your phone (if you are not in the app) and the invitation is displayed in your **Inbox**.

1. Tap **Inbox** , and next to the group invitation, tap **Accept/Decline**.
2. The group details open; tap **Accept/Decline**.
3. Tap **Accept**. Notice here you can also **Decline** the invite or save it and decide if you want to join later, **Ask Me Later**.

Group invitations remain in your **Inbox** after you respond to them. If desired, you can tap **Delete** to delete the invite message and remove it from your **Inbox**.

### Start a new group and invite users

1. Tap **Groups & Chat** , tap .
1. Tap **Start a new group**.
2. Tap **Group name** and enter a name for your group.
3. (Optional) Tap **Description** and provide a description for the group.

**TIP:** While providing a description is optional, the description is displayed within the invite process and can be helpful in deciding whether to join the group.

4. For **Open to everyone**, if toggled on, all organization members are sent an invite to join the group. If toggled off, you can select specific members to invite (off is the default).
5. (Optional) Add a picture or avatar for the group.
  - a. Tap the image icon and choose the source where your picture resides.
  - b. Tap the picture. You can move the picture within the frame and use the slider at the bottom to zoom in or out.
  - c. When satisfied with the picture, tap the checkmark at the top right.
6. Tap **Save**.

7. For groups that are not open to everyone, select who you want to invite. If your group is open to everyone, all members receive an invite.

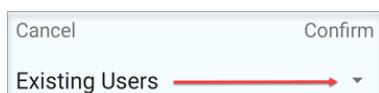
#### Invite existing members:

- Ensure you have the correct group listed for **Group**.
- For **Source**, leave **Existing Users** and tap your recipients from the list displayed.
- When finished, tap **Send {#} invites**. The send button displays the number of invites.

Recipients receive an invite in their **Inbox**.

#### Invite people from your phone contacts:

- Ensure you have the correct group listed for **Group**.
- For **Source**, tap **Existing Users** and at the bottom of the screen, next to **Existing Users**, tap the down arrow, tap **Phone Contacts** and then tap **Confirm**.



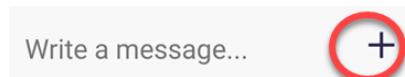
- Tap each contact you want to invite.
- When finished, tap **Send {#} invites**. The send button displays the number of invites.

Recipients receive an invite text with a link to install and launch Vanco Mobile.

### Invite someone to a group

You can invite organization members to a group, as well as others from your phone contacts.

- Tap **Groups & Chat** , tap the applicable group.
- Next to the message box, tap the plus sign.



- Select .
- On the **Invite users** screen, tap **To a group** and select those whom you are inviting:

#### Invite existing members:

- Ensure you have the correct group listed for **Group**.
- For **Source**, leave **Existing Users** and tap your recipients from the list displayed.
- When finished, tap **Send {#} invites**. The send button displays the number of invites.

Recipients receive an invite in their **Inbox**.

## Invite people from your phone contacts:

- a. Ensure you have the correct group listed for **Group**.
- b. For **Source**, tap **Existing Users** and at the bottom of the screen, next to Existing Users, tap the down arrow, tap **Phone Contacts** and then tap **Confirm**.
- c. Tap each contact you want to invite.
- d. When finished, tap **Send {#} invites**. The send button displays the number of invites.

Recipients receive an invite text with a link to install and launch Vanco Mobile.

**TIP:** From within the **Directory**, you can also invite people to join a group.

## Edit a group

You can edit groups that you created.

1. Tap **Groups & Chat** , tap the applicable group.
2. Next to the group name, tap the ellipsis .
3. On the **Settings** screen, tap **Edit group**.
4. Make your edits and tap **Save**.

## Send a message to the group

1. Tap **Groups & Chat** , tap the applicable group.
2. Type your message and click **Send**.

If your group has not muted notifications, when you send the group a message, any group members not currently in the app receive a phone notification and all group members are alerted they have unread messages on the **Group and Chat** screen.

On the **Group & Chat** screen, the group with new messages is moved to the top of the list and under the group name, the group members see a message showing they have one or more unread messages.



## View group members

1. Tap **Groups & Chat** , tap the applicable group.
2. Next to the group name, tap the ellipsis .
3. On the **Settings** screen, tap **members**.

## Leave a group

1. Tap **Groups & Chat** , tap the applicable group.
2. Next to the group name, tap the ellipsis .
3. On the **Settings** screen, tap **Leave group**.
4. Confirm your selection by tapping **Yes**.

## Calendar

The **Calendar** is where you manage your events. Any events that you are included in display in this area. You can RSVP, add events to your calendar and create new events.

### Create an event and invite attendees

You can create an event for all members of the organization or for a specific group.

1. Tap **Calendar** , tap .
2. Enter an **Event name**.
3. (Optional) For **Venue name**, you can provide venue information that a browser search may not find. For example, a Zoom virtual meeting, or the name of a specific room, suite, or hall.
4. (Optional) Tap **Select Address** and use the search features to find the address for your event.
5. Tap **Start time** and select the date and time.
6. Tap **End time** and select the date and time.
7. If the event is all day, toggle **All day** to on and enter the date and start time.
8. If your members can bring guests, toggle **Allow additional guests** to on.
9. If the event is open for everyone, leave the **Only visible to a specific group** toggled off. If the event is for a specific group, toggle this option on and follow these steps:
  - a. Tap **Select Group** and at the bottom of the screen, tap the down arrow to display all groups.
 
 The dialog box shows 'Cancel' and 'Confirm' buttons. Below is a list with 'General' selected, indicated by a red circle around the 'General' label. A downward arrow icon is at the bottom right.
  - b. Tap the applicable group and then tap **Confirm**.
10. If you want to create a specific group for this event, toggle **Automatically create group for attendees** to on. The event name becomes the name of the group and everyone who responds yes is included in the group.
11. (Optional) Tap **Description** and provide information about the event.
12. (Optional) Add a picture or avatar for the event.
  - a. Tap the image icon and choose the source where your picture resides.
  - b. Tap the picture. You can move the picture within the frame and use the slider at the bottom to zoom in or out.
  - c. When satisfied with the picture, tap the checkmark at the top right.
13. Tap **Save** and then **OK**.

## Edit an event

You can edit event information for events you created.

1. Tap **Calendar** , tap the event.
2. On the **Event details** screen, tap **Edit**.
3. Make your edits and when finished, tap **Save**.

## RSVP for an event

You can find a listing for all the events you are invited to on the **Calendar** screen. Unlike groups, no invitation is sent when you are invited to an event. Instead, the event is displayed on your **Calendar** screen.

**NOTE:** *The first time you respond yes to an event, Vanco Mobile asks for permission to access your calendar. If you allow access, Vanco Mobile can add the event to your calendar. If you deny access, Vanco Mobile cannot add the event to your calendar, however you may do so yourself.*

1. Tap **Calendar** , tap the event.
2. For **Going?**, tap your response, **Yes** or **No**.
  - If yes, the **Yes** option is highlighted, and the event is displayed under both **All events** and **Attending**. If you allowed Vanco Mobile access to your calendar, you have the option to automatically add it to your calendar.
  - If No, the **No** option is highlighted, and the event is displayed under **All events** only.
3. If the event allows for guests, include the number you are bringing:
  - a. Tap **Plus no guests**.
  - b. At the bottom of the screen you see a box displaying a number, tap the down arrow and then tap the number of guests.



- c. Tap **Confirm**.

The guest option now reads **Plus {your number entered} guests**.

## View event attendees

You can view event attendees for the events that you are attending.

1. Tap **Calendar** , tap **Attending**.
2. Tap the event and then tap **Attendees**. If you don't see the **Attendees** option, scroll down.

## Delete an event

You can delete events that you created.

1. Tap **Calendar** , tap the event.
2. On the **Event details** screen, tap **Edit**.
3. Scroll to the bottom of the event and tap **Delete event**.

## Donate

If your organization has an existing Vanco WebPay or GivePlus Online site, tap **Donate** to link to the site, where you will find donation opportunities.

## Directory

The **Directory** lists all your organization members. From the directory you can send a chat message to a member, invite people to join a group or join the organization. If you are an administrator, you can also suspend a member.

### Send a chat message

1. Tap **Directory** , tap the message recipient.
2. Tap **Direct message**.
3. Compose and send your message.

Chat messages display on the recipient's **Groups & Chat** screen.

**NOTE:** A member can choose to be hidden from the **Directory**. This setting is found under **My Profile > Hide me from directory**. The default, however, is to show all members.

### Invite someone to join a group

1. Tap **Directory** and then tap .
2. Tap **To a Group**.
3. On the **Invite users** screen, select those who you are inviting:
 

**Invite existing members:**

  - a. Ensure you have the correct group listed for **Group**.
  - b. For **Source**, leave **Existing Users** and tap your recipients from the list displayed.
  - c. When finished, tap **Send {#} invites**. The send button displays the number of invites.

Recipients receive an invite in their **Inbox**.

#### Invite people from your phone contacts:

- a. Ensure you have the correct group listed for **Group**.
- b. For **Source**, tap **Existing Users** and at the bottom of the screen, next to Existing Users, tap the down arrow, tap **Phone Contacts** and then tap **Confirm**.
 
- c. Tap each contact you want to invite.
- d. When finished, tap **Send {#} invites**. The send button displays the number of invites.

Recipients receive an invite text with a link to install and launch Vanco Mobile.

## Invite someone to join the organization

1. Tap **Directory** and then tap .
2. Tap **New Users**. Vanco Mobile displays your phone contacts.
3. Tap the applicable name and tap **Send 1 invites**.

Recipients receive an invite text with a link to install and launch Vanco Mobile and are automatically included in the default group.

## Suspend a member

**Prerequisite:** You must be an administrator to suspend a member.

1. Tap **Directory** , tap the person you are suspending.
2. Tap **Suspend user**.
3. Confirm your actions by tapping **Yes**.

The member is immediately bumped out of the app and removed from the Vanco Mobile directory. An administrator will see them as **Suspended** in the Admin portal.

## Reactivate a suspended member

**Prerequisite:** You must be an administrator to reactivate a member.

1. Tap **Directory** , tap the person you are reactivating.
2. Tap **Activate user**.

## Inbox

The **Inbox** is where all your group invites are located. This is where you can accept or decline these invites as explained in [Join a group](#).

Administrators can create and send messages to all members from the **Inbox**, and members receive those messages in their **Inbox**. This is different than sending a group message, or direct messaging a member. Those types of messages are displayed in the **Groups & chat** area. This is more of a broadcast message. It provides a good way to get information out to all members and ensures the message stands out from other group communications.

### Send an all-member message

**Prerequisite:** You must be an administrator to send a broadcast message.

1. Tap **Inbox** , tap .
2. Tap **New Message**.
3. Enter your message and when finished, tap .

**TIP:** You can include hyperlinks and images in these messages.

### View sent messages

**Prerequisite:** You must be an administrator to view sent broadcast messages.

1. Tap **Inbox** , tap .
2. Tap **Sent**.

If you have questions about using the Vanco Mobile app, please contact the Vanco support team at [cs@vancopayments.com](mailto:cs@vancopayments.com) or by phone at 800.675.7430.