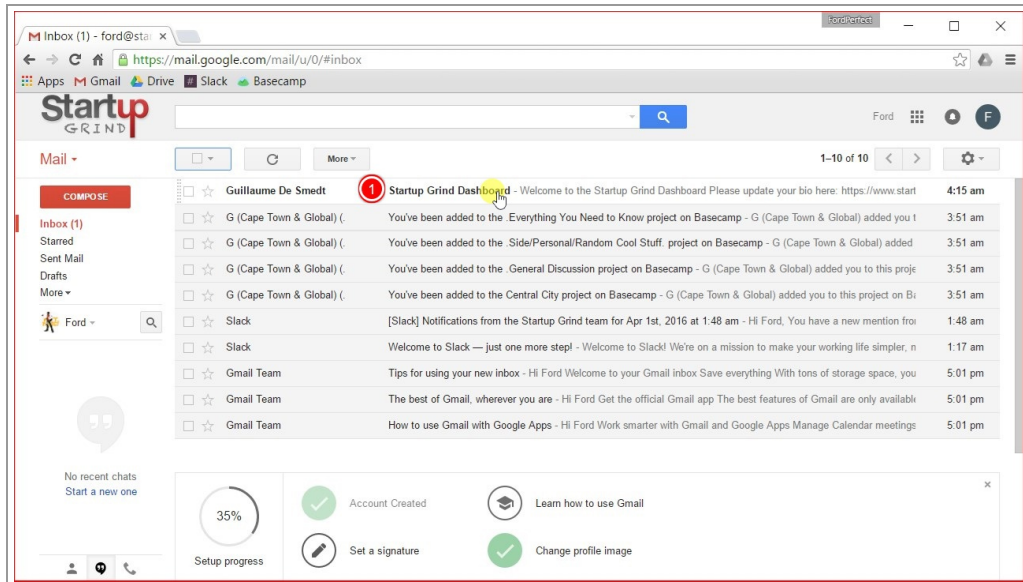# How To - Navigate SG Dashboard

Created By: G

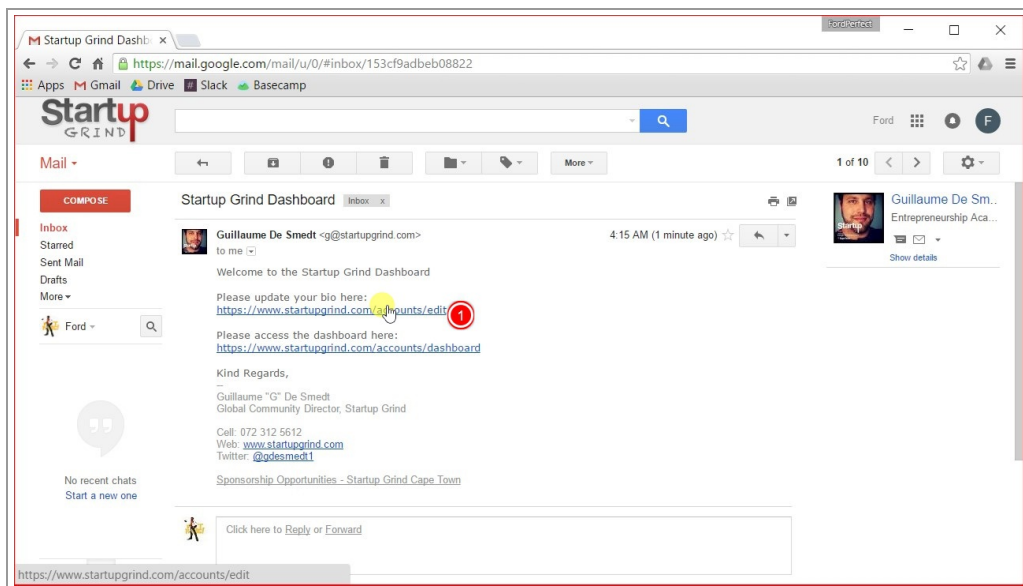Startup Grind Training Documentation

Email Setup

Please open your email in your Startup Grind Chrome User Profile
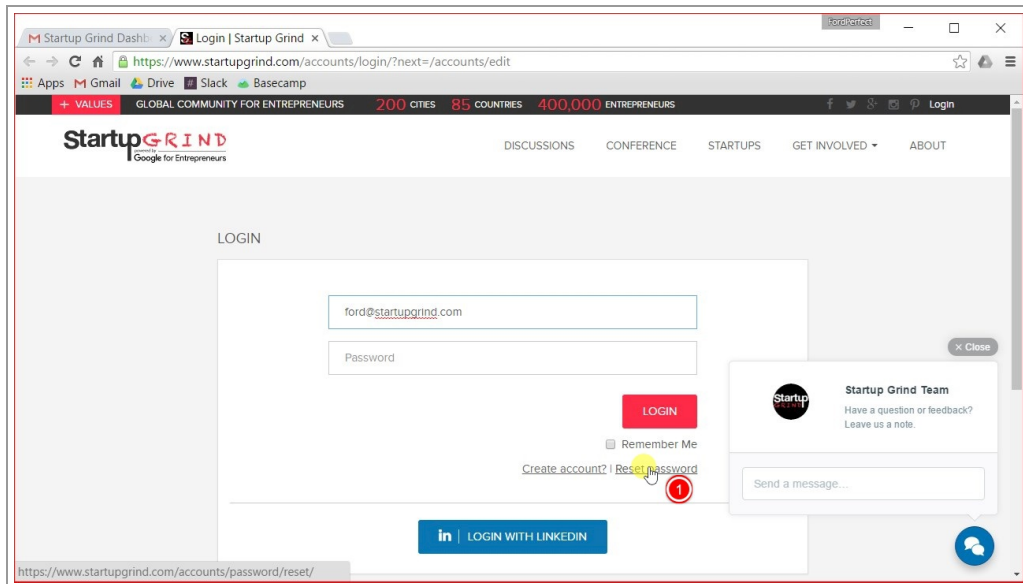You will receive an email with links to your Profile & Dashboard

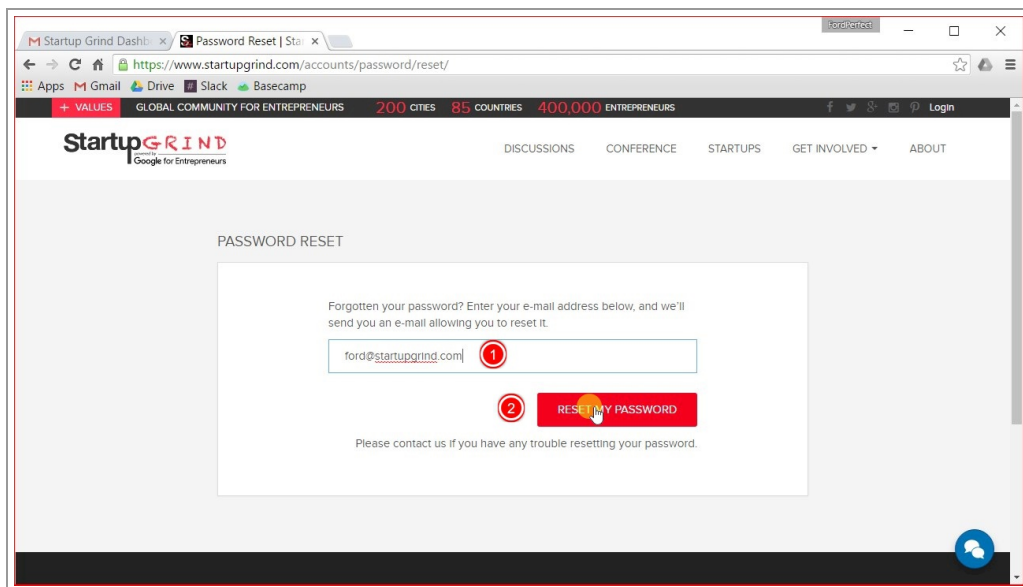1. Click on relevant email

Click Link

1. Click any of the links to go to the dashboard area of the Startup Grind website.
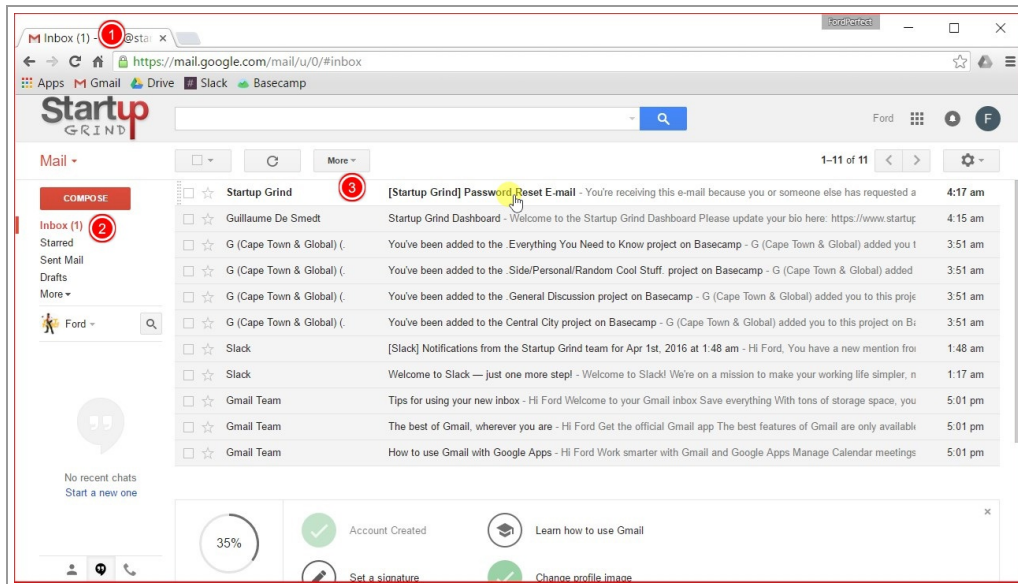
Reset Password

1. If this is the first time coming here with your new Startup Grind email, click the "Reset Password" button
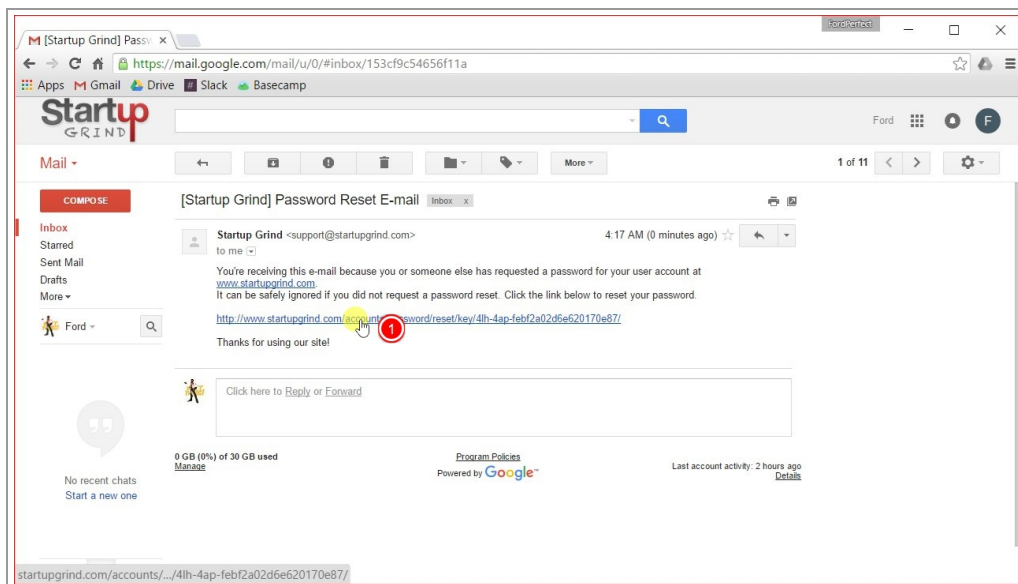
Reset Here

1. Type in your Startup Grind email address
2. Hit "Reset My Password"

Reset Email

1. Go back to your inbox
2. Click "inbox" to refresh your inbox, and bring in latest emails
3. Open the email you just received regarding resetting your password

Click Link

1. Click the link in the email to reset your password

Create Password

1. Create a NEW, strong password
2. Repeat password to ensure correct spelling
3. Click "Change Password"

Security

1. Select "Never" for security reasons

Log into Startup Grind account
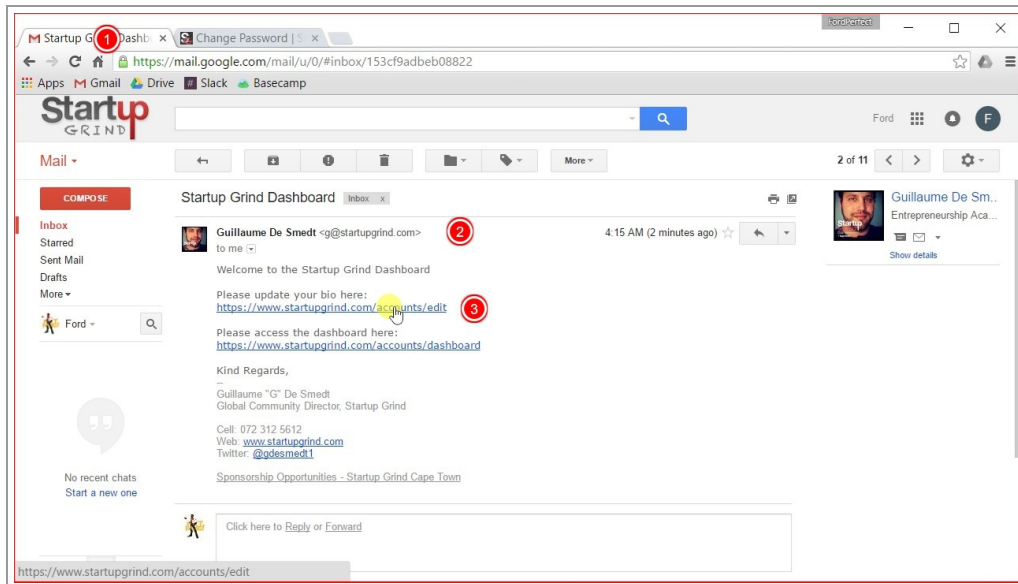
1. Go back to Gmail
2. Open original email to find links
3. Click on any of the links

Login
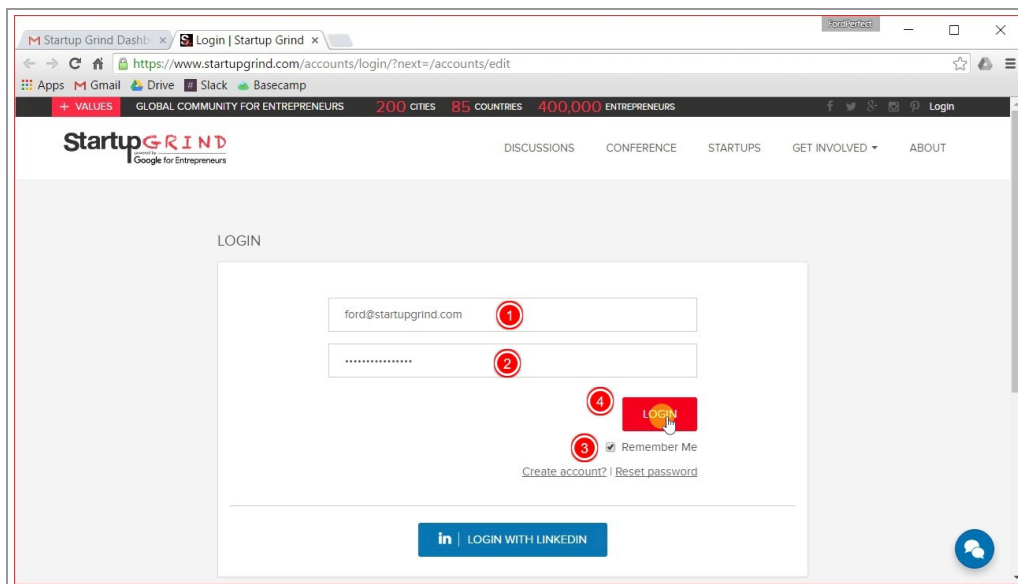
Go to: www.startupgrind.com/accounts/edit

1. Type in your Startup Grind email address
2. Insert your newsly reset password
3. Click "Remember me"
4. Hit "Login"

Profile Images
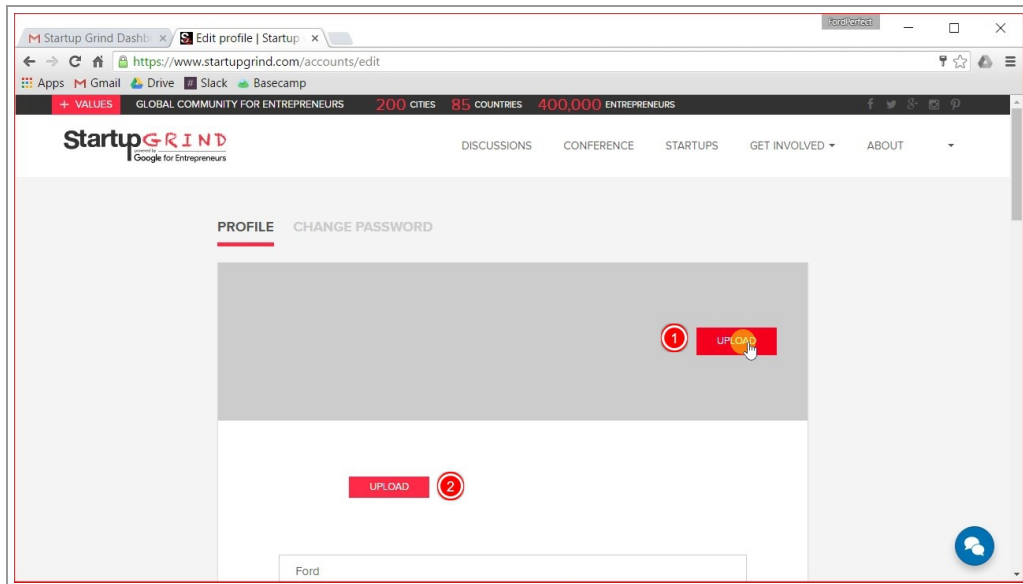
Once logged in, update your Cover photo, and your profile image

1. Click "Upload" and upload a cover image
2. Click "Upload" and choose an applicable profile image

Cover Photo
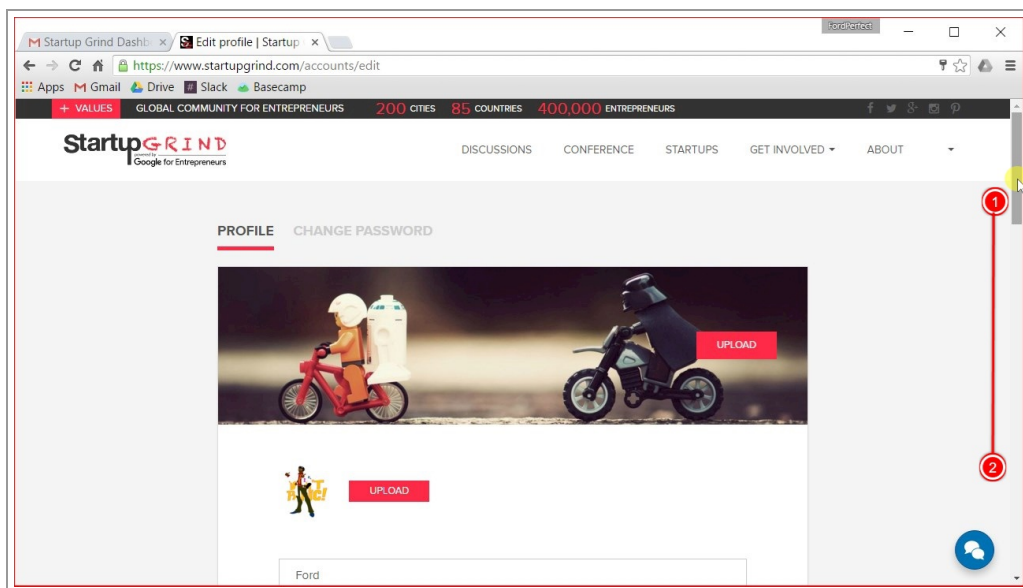
1. Scroll down to enter applicable info

Your Bio

1. Company you own, or work for
2. Your Startup Grind title (Chapter Director [insert city])
3. Industry you are a part of in your day-to-day job
4. Your bio
5. This should already be filled in, if not, type in your Startup Grind email
6. Link to your personal or business website

Your Social Links

1. Your personal Linkedin URL
2. Personal Facebook URL
3. Personal Twitter handle
4. Personal Google Plus profile link
5. Whether or not you would like to display your discussion on your page
6. Choose whether to display your blog posts on the page
7. Save when done

## Profile Overview
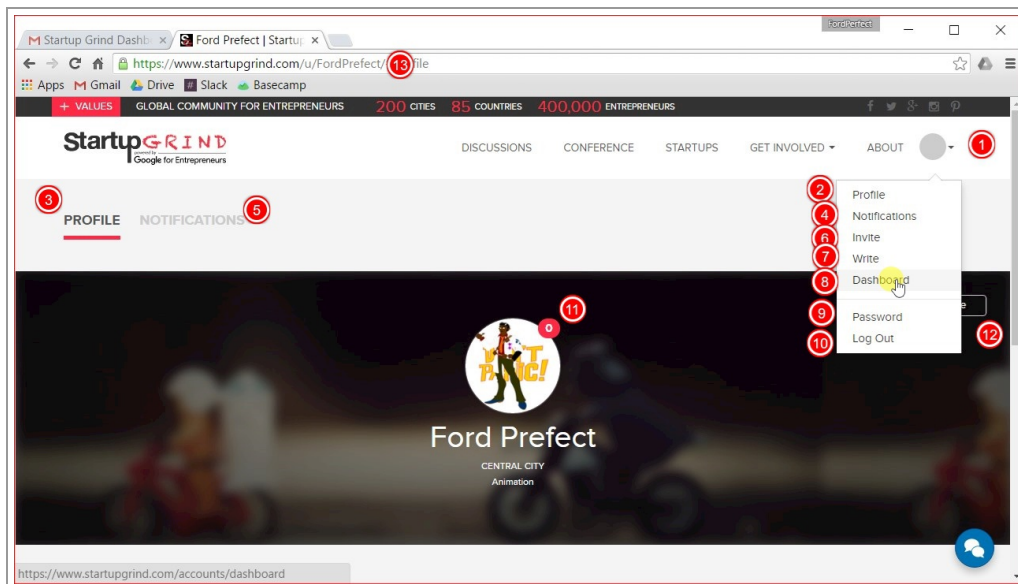
Once signed into the Startup Grind website, you will be able to access certain places on the site:

1. Click on your profile image to see the different options (Takes a few days for this image to update to latest profile image.

2. Profile (Where you can view & edit your profile)

3. Click on this tab to view your profile

4. Notifications (Read your notifications here)

5. When in your Profile, you can also click here to access your notifications

6. Invite (If you have any invitations that you can use to invite people to Startup Grind website. We used to be invite only, but now anyone can register, so not really applicable anymore)

7. Write (If you have been given "write" access, you will be able to write on the Startup Grind blog. If you do not have access, please request from Francisco or G)

8. Dashboard (Here you can access your dashboard, once again, if you do not see this, please ask Francisco or G for access)

9. Password (Reset your password here)

10. Log Out (Log out of your profile)

11. This show how many times you have been upvoted. Your score will be increased when others vote your comments or blog posts up

12. Behind this menu, you'll see the "Edit Profile" button and it's where you can edit your profile

13. This is your Profile link, it has the format of www.startupgrind.com/u/[insert your username] -

Here is G's profile: www.startupgrind.com/u/gdesmedt1/

Here is Francisco's profile: https://www.startupgrind.com/u/FranciscoCruz/

Here is Homer Simpson's profile: https://www.startupgrind.com/u/mmdqfs/
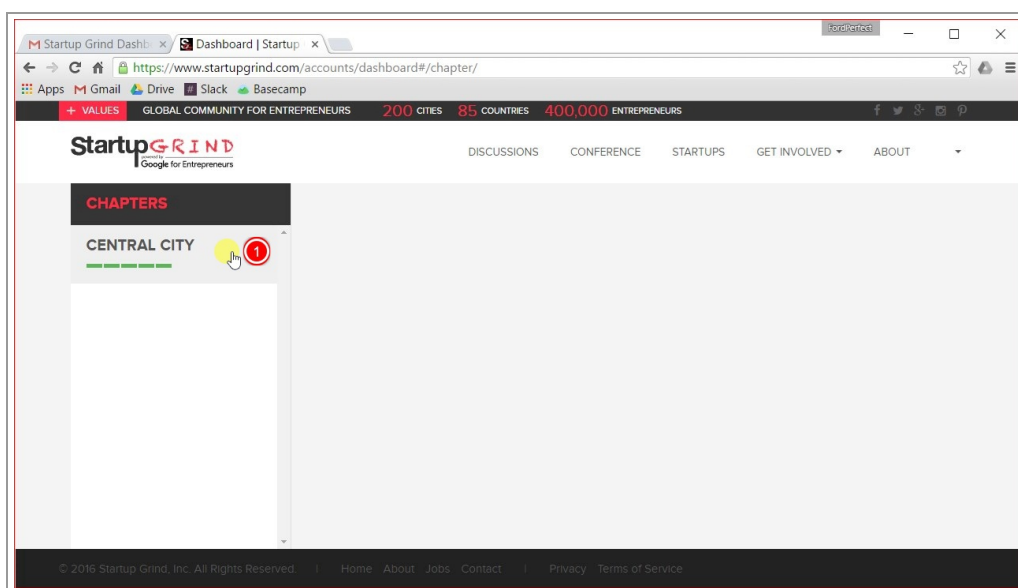
Your Dashboard

1. Click on your city, to get access to all the info

Creating A New Event

1. Click on your chapter
2. Click on Events
3. Click on "New Events" to get to this current screen
4. Fill in speakers First and Last name
5. Speakers Company
6. Speakers Short Bio

Speakers Bio

1. Speaker's Short Bio
2. Speakers Long Bio
3. Highlighting text will make the "Rich Text" bar appear where you can make the highlighted text bold, Italic, or underline etc.

Speakers Image

1. Upload Speaker's Image

Twitter & Dates

1. Speakers Twitter Handle (If they have one)
2. Speakers Company's Twitter Handle (If they have one)
3. Choose the start time, and date for your event
4. Choose the end date & time. Our usual format is 3 hours after event start time

Magic Button

1. You can either hit "Add New Item" and add items to the agenda manually or...
2. You can hit the "Magic" Button and everything will auto-populate.
3. The same goes for your Venue, Sponsors & Partners (Basically anywhere you see the "Magic" button

The data comes from the standard template, but after you make changes, and save the event, it will use the newly saved info for future events.
Even if you do use the Magic button, you can still add, edit or remove items.

Sponsors

1. Click on sponsors dropdown
2. Choose a sponsor to add them to this event
3. Alternatively, you may also use the Magic Button to auto-populate this info

Drag Sponsors
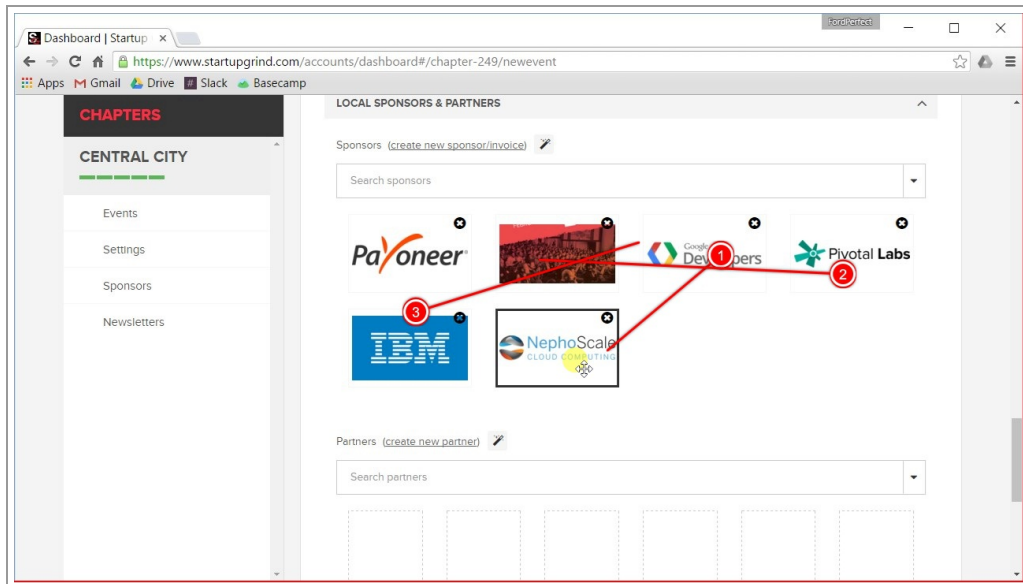
You can drag and drop the sponsors and partners into different positions

Magic Buttons For Tickets
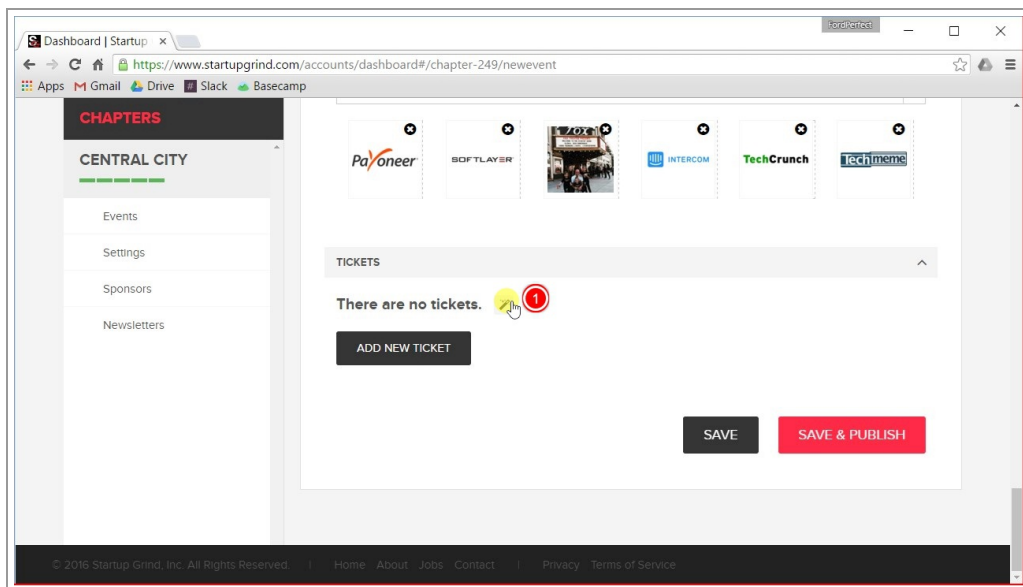
Hit the Magic button for the tickets to be created, then edit as you wish.

Ticket Dates
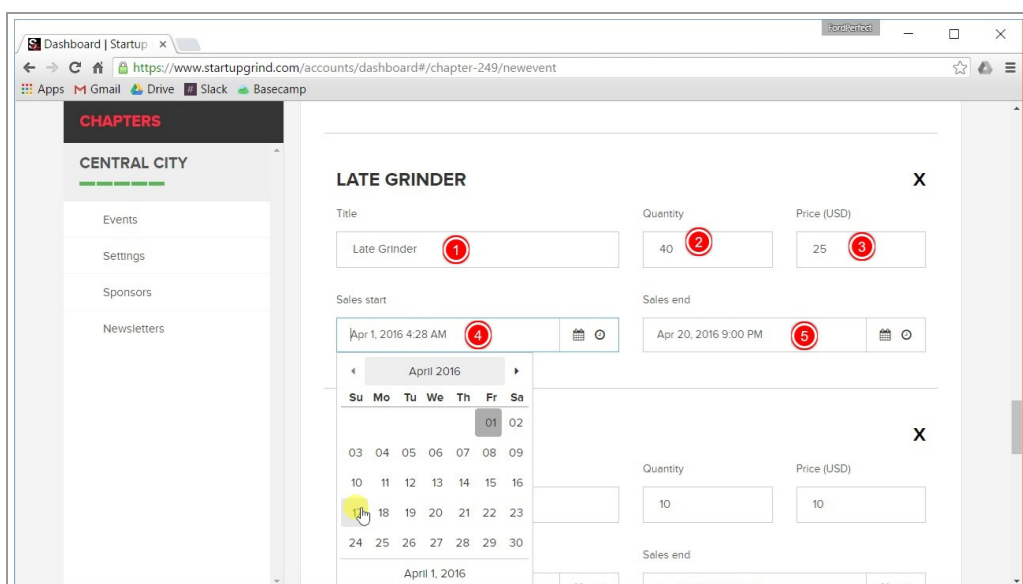
1. Ensure the Ticket Name is correct, change to something suitable for your area, or use as is
2. Add, or change the "Quantity" of tickets that can be purchased
3. Set the "Price", this should be in your local currency, if not, then we don't have the currency supported and will either use a currency you can use, or set your page to accept external ticketing. Creating the tickets on an external ticketing platform will be your responsibility
4. Set the "Sales Start" time, for when the sale of these tickets should start
5. Set the "Sales End" time, this will set the tickets to stop being on sale at this given time

Delete Tickets
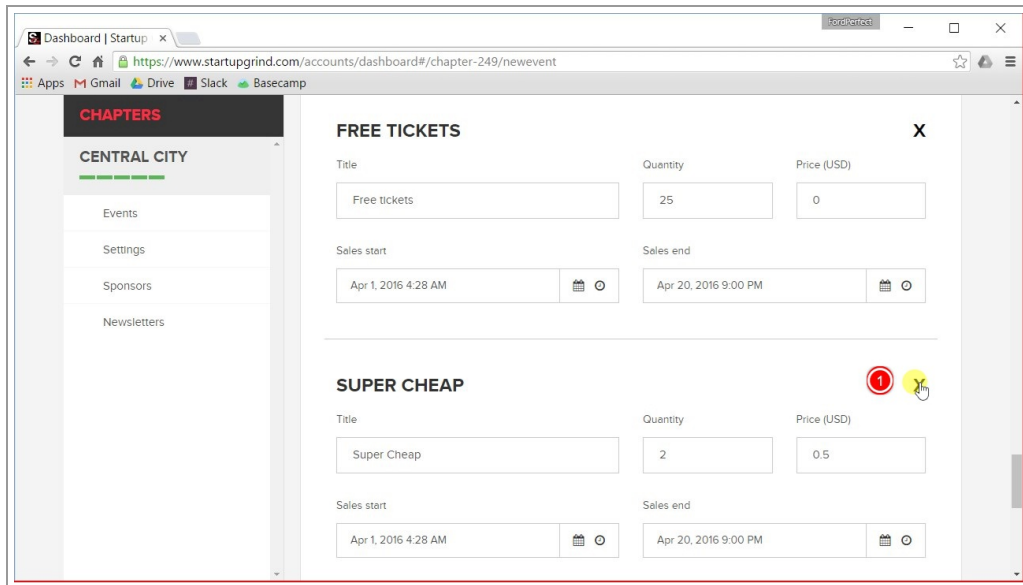
1. If you wish to delete a ticket, hit the (x) button
If you sell 1 or more ticket, you will not be able to delete that ticket type.

Save & Publish
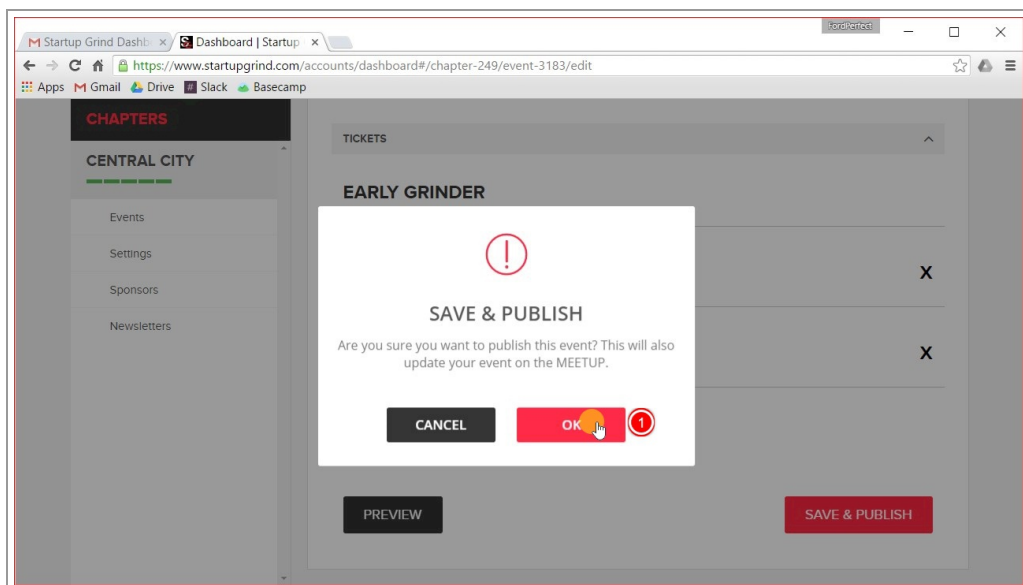
When you "Save & Publish" it publishes it live, and it also pushes it to Meetup.com
We use meetup.com as another marketing tool.

Shortcuts
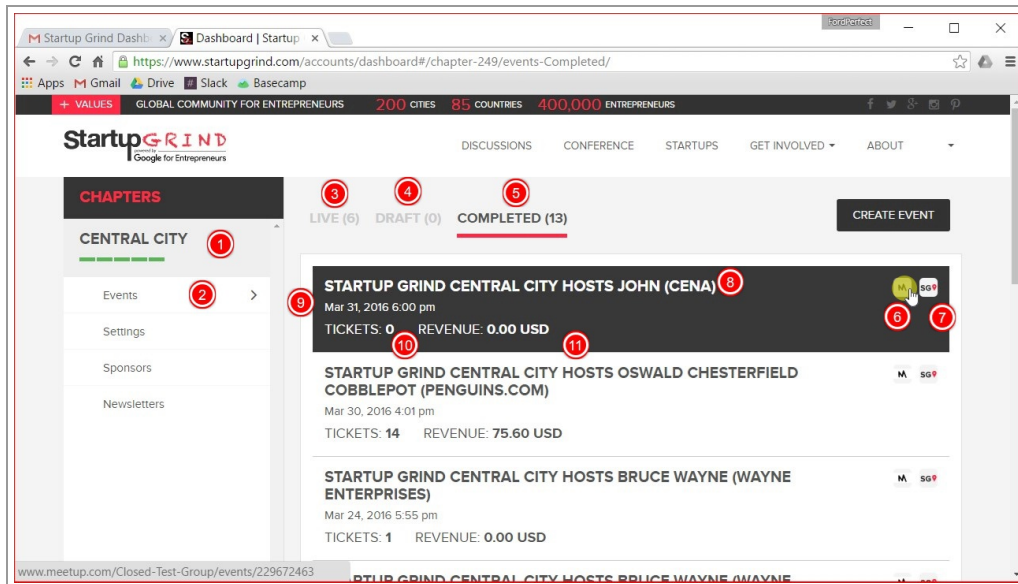
1. Choose your chapter
2. Choose events
3. Live - Will shouw your live events
4. Drafts - Will show the events that have been saved, but not published
5. Completed - This will show all your completed events, the page does take a few seconds to load
6. Click on "M" to go firectly to your meetup page
7. Click "SG" to go directly to your events page to see your "client facing" events page with tickets etc.
8. Your event name
9. Date of the event
10. Amount tickets sold
11. Amount of revenue in ticket sales

Chapter Settings
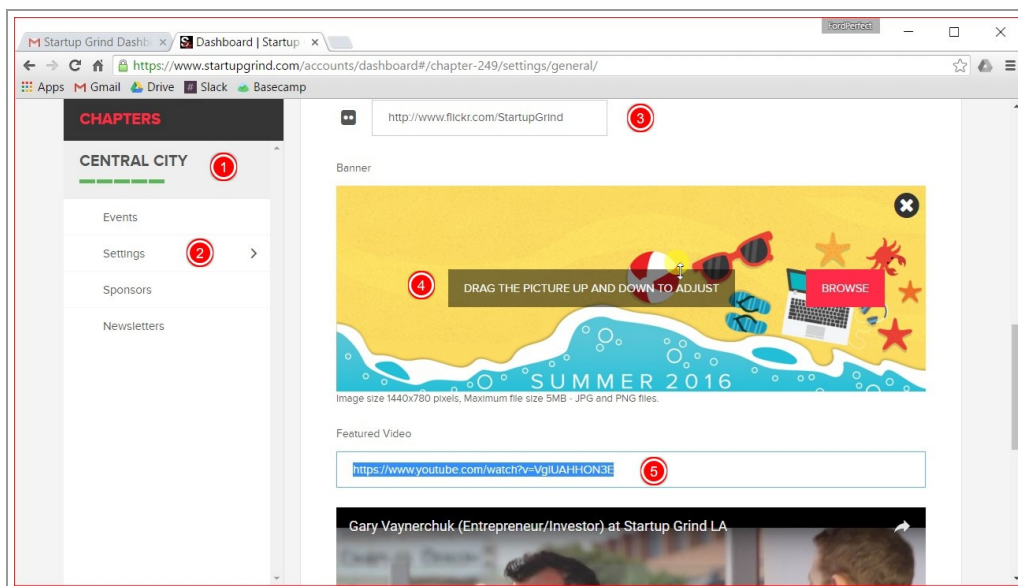
Under "Chapter - Settings - General" tab, you will be able to change a chapter wide settings (do not get confused between chapter settings, and event settings)
1. Click Your Chapter
2. Click on "Settings"
3. In this section, fill in your chapter's Social media links
4. After uploading an image for your chapter, please feel free to move the image up and down to view the correct section of the image
5. Insert a YouTube link. Preferably a link of your last great event (i.e. a video with a quality speaker, Great video, and clear Audio), or maybe a highlights reel.
Click "Save" when done

Chapter Sponsors & Partners
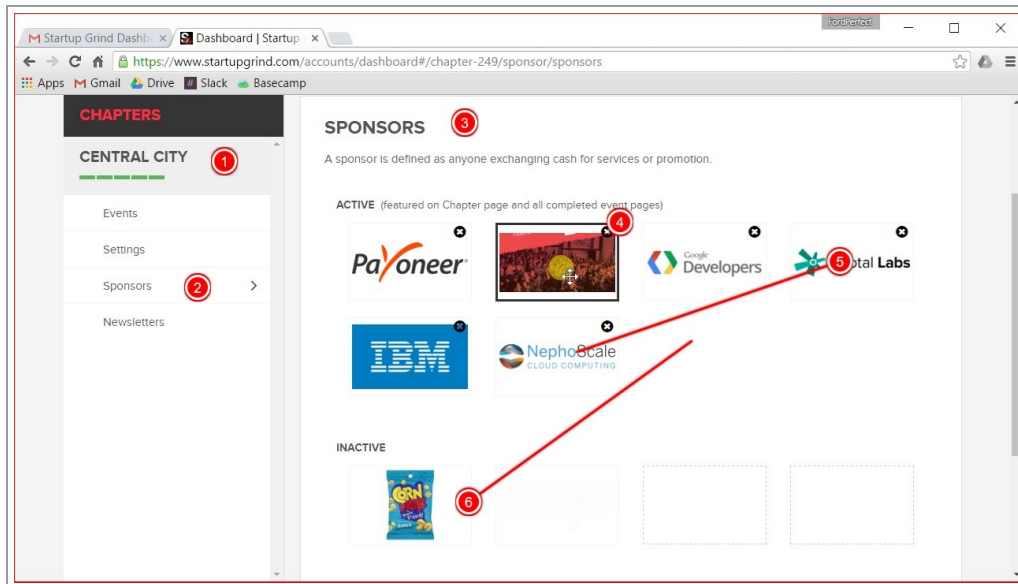
1. Click on your city
2. Click on Sponsors
3. Click on sponsors tab (or partners tab)
4. Hitting the (x) button will move it to Inactive
5 & 6. Able to move the sponsor (or partner) to different positions
Click "Save" when done

Creating Invoices
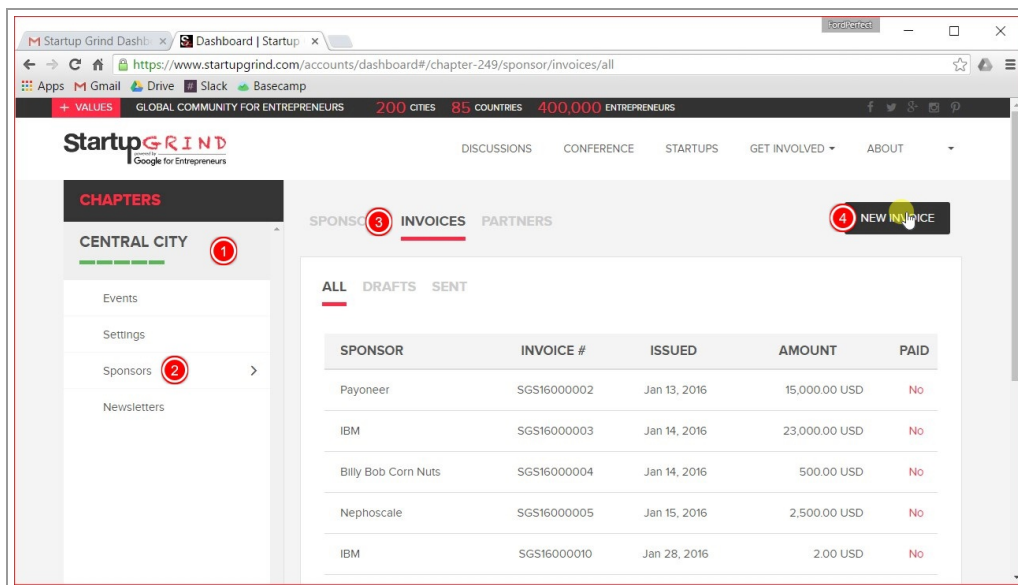
1. Chapter you wish to create invoice for
2. Sponsors
3. Invoices tab
4. New Invoice

Sponsorship Details

1. Either choose an existing sponsor, or create a NEW sponsor
2. Date the sponsorships starts
3. Payment Terms i.e. 30 days to pay, 60 days to pay etc.
4. Total amount of events they will sponsor
5. Amount for that specific event
6. If there are Tax requirements, fill in the amount
7. This will be the grand total that sponsor has to pay on this specific invoice

Send Invoice

1. Fill in invoice description.
What are you offering your sponsor, to ensure that both parties know what they are getting and giving.
If the amount is over $5000, then a proper sponsorship agreement is needed
2. Fill in any internal notes, if needed. This is for your eyes only
3. Create & Send Invoice, will create the invoice, and send it to your personal email.
You are responsible for sending the invoice to your sponsor.
Feel free to use this time to thanks them for the support and nurture the relationship.

Accept Warning
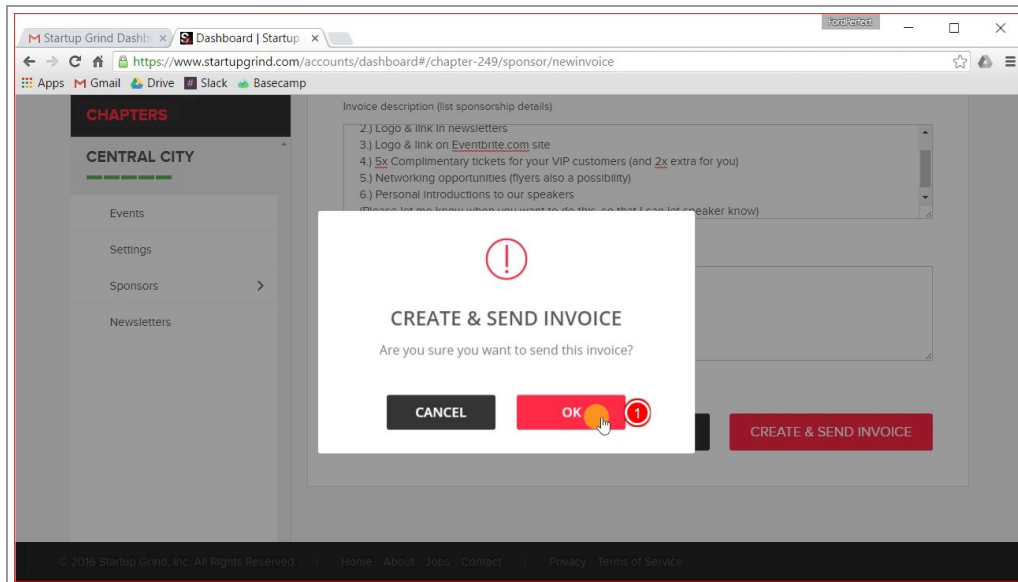
A warning will pop up, if you sure all the details are correct, hit "OK"

Sent Invoices
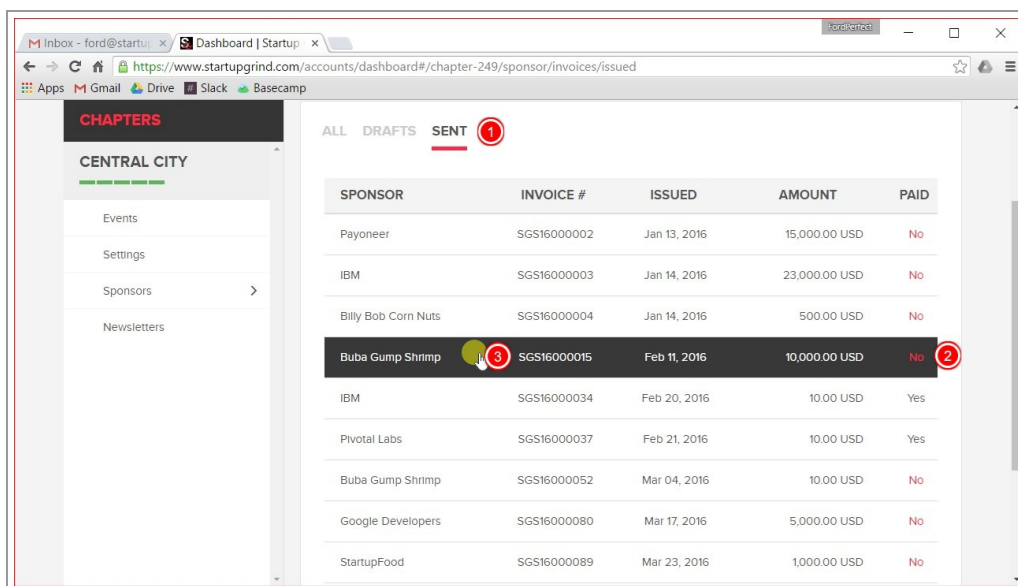
1. Clicking the "Sent" tab will show you all the invoices you have sent for this chapter
2. Here you can see whether the sponsor has paid, or not
3. Clicking on the invoice will show you the details of the invoice

When the invoice is sent to a sponsor, there will be a link in the PDF that will allow the sponsor to pay the amount directly.
Once they have paid, HQ (Startup Grind Headquarters) will send the money to your Payoneer account.
Once you receive the amount in your payoneer account, you can either send the money to your bank account, or you can order a "debit card" and spend the money anywhere in the world that accepts MasterCard.

Newsletters
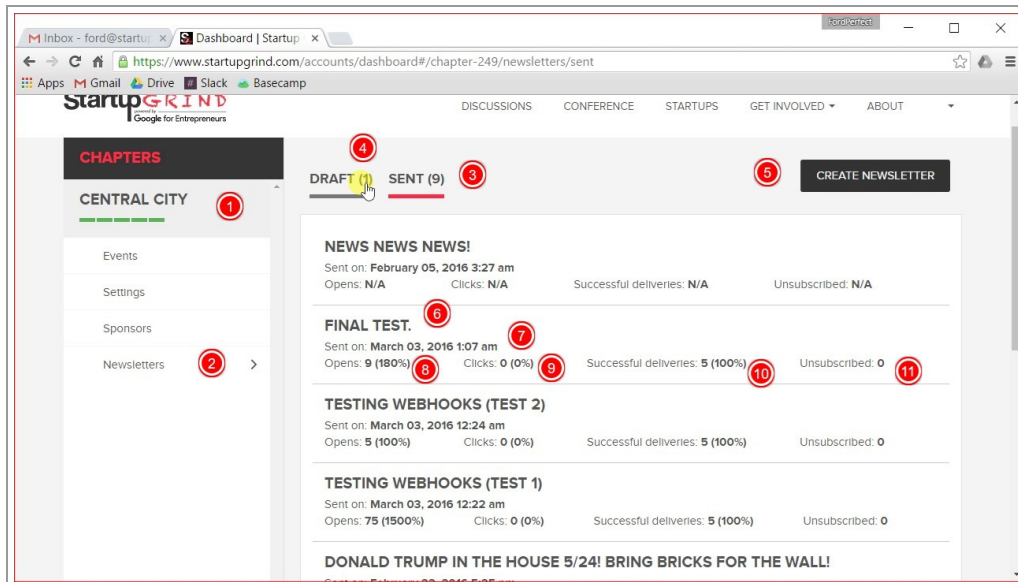
1. Click on your chapter
2. Click on "Newsletters"
3. "Sent" Tab = Shows all the newsletters that have been successfully sent
4. "Drafts" Tab = All the newsletters that have been written & saved, but not sent
5. Click here to "Create a Newsletter"
6. Subject line of your newsletter
7. When newsletter was sent (or whether it's been scheduled)
8. Amount of times newsletter was opened
9. Amount of times people clicked on links in your newsletter
10. How many people the newsletter was delivered to
11. Amount of people that unsubscribed

Creating A Newsletter
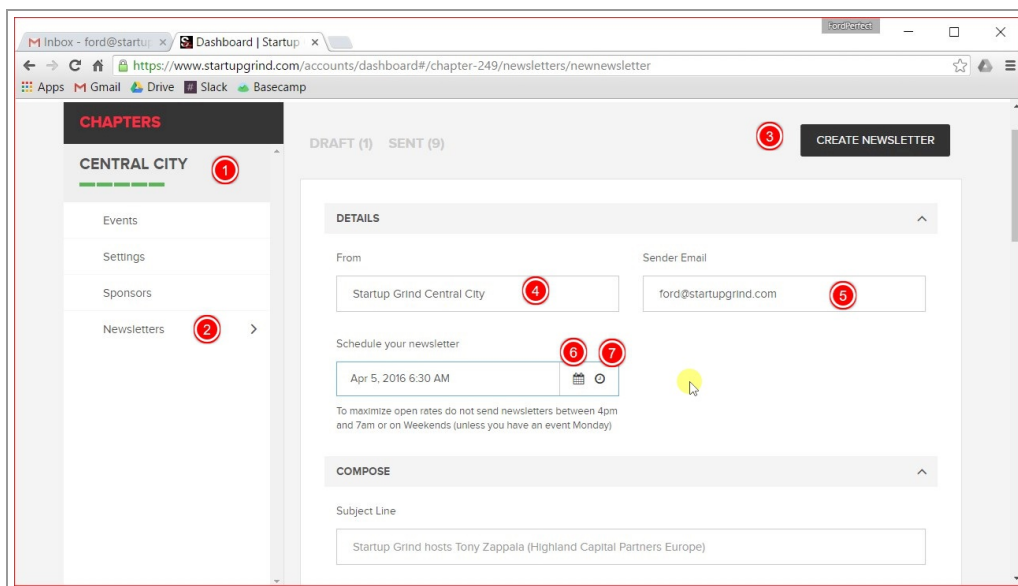
1. Choose Your Chapter
2. Click on Newsletters
3. Click on "Create Newsletter"
4. Enter the "FROM NAME" - preferably your chapters name
5. Enter the "FROM EMAIL" - This will be your Startup Grind Email address
- If you do not have a startup grind email, type in "no-reply@startupgrind.com"
- When you send a "Test" email, it will send the email to the email address that is specified in the "Sender Email" box
6. Schedule the Date
7. Schedule the Time for the newsletter to be sent out on

Rich Text
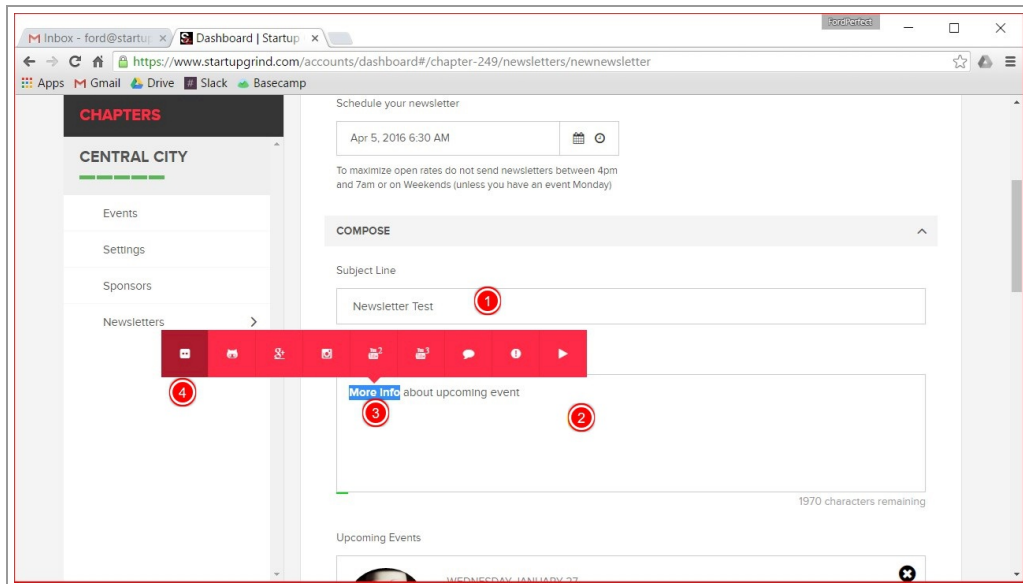
1. Fill in an applicable, eye catching (preferably short) Subject line for your newsletter
2. Fill in the message that you wish to send the recipients of the email. Keep it short and to the point, please don't type full Essays' ,people don't read them ;)
3. If you highlight a section of text, the "Rich Text" editor will appear
4. Clicking on "Bold" will make the highlighted text *BOLD* etc.

Delete Featured Events
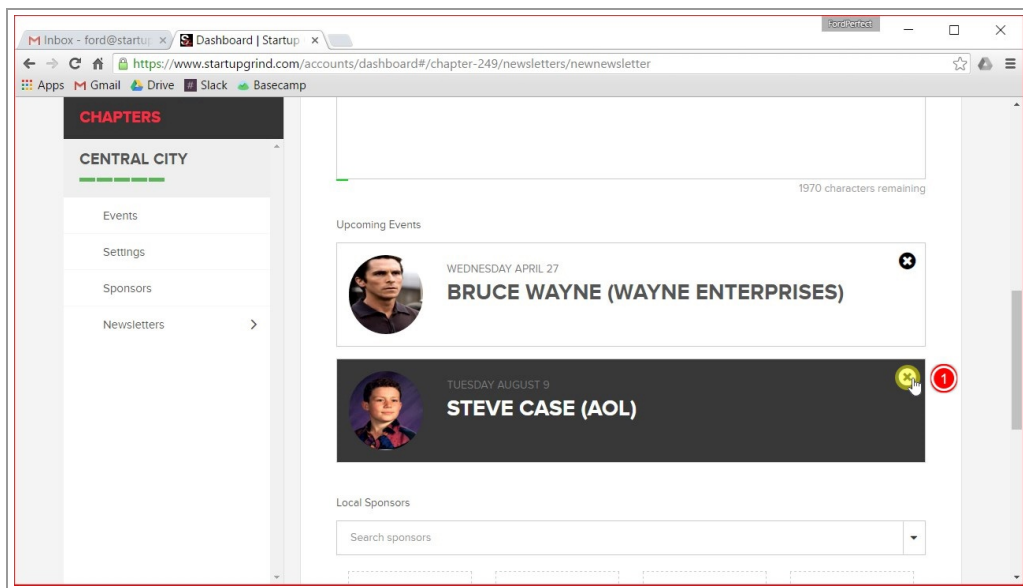
Choose which events your wish to be included in your email
Clicking on the (x) will remove that event from this newsletter

Re-order Sponsors & Partners
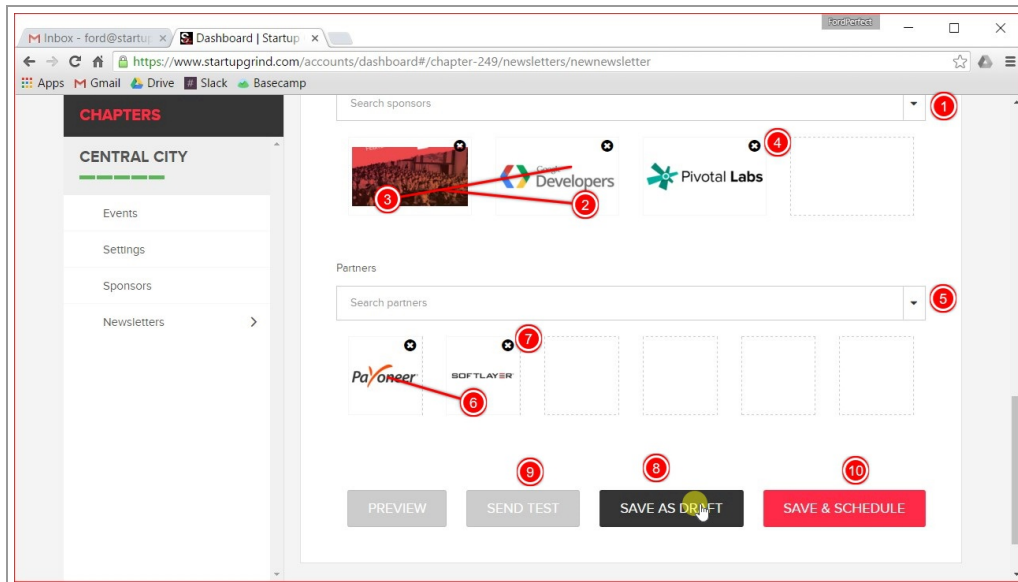
1. Click here to add a sponsor
2 & 3. Drag and drop the sponsors to be in correct order
4. Click (x) if you wish to remove the sponsor from this newsletter
5. Click here to choose a partner
6. Feel free to re-order the partners
7. Click (x) to remove the partner
8. Click on "Save Draft" in order to save the draft.
9. Only AFTER clicking "Save Draft" will the "Send Test" be visible.
Clicking on Send Test will send an email to the "Senders Email" address, as set earlier, higher up on this page.
10. Once you are happy with how it looks, and checked ALL spelling mistakes, and ensure the content is relevant, then hit the "Save & Schedule" button.

The Test Email
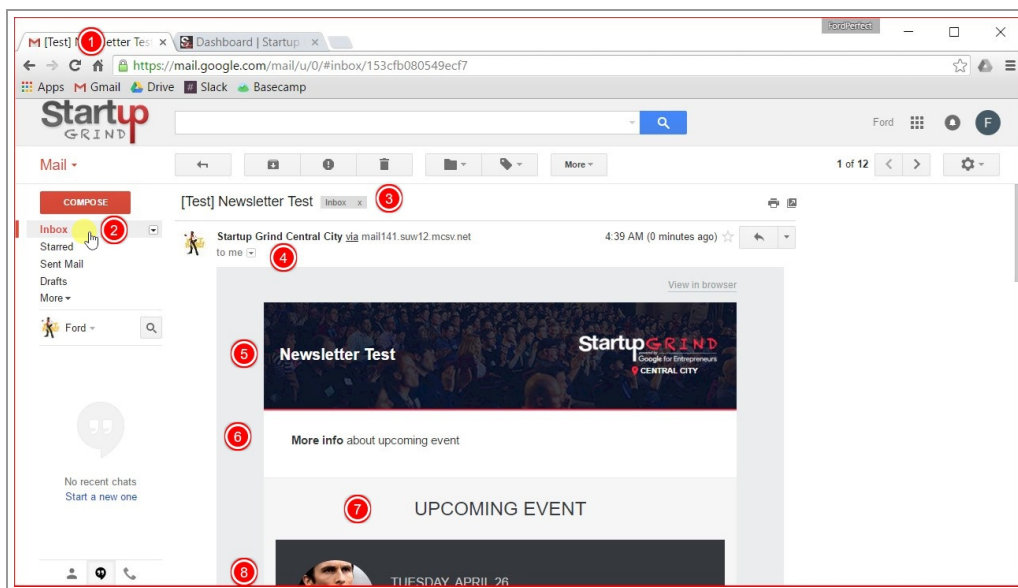
1. Go back to your Startupgrind Email
2. Select Inbox, this will refresh page, and bring in newly arrived TEST email
3. Here you'll see your newsletters subject Line
4. Here you can see the "From Name" & "From Email"
5. Once again, the newsletters subject line
6. Your content will appear here
7. Upcoming events will be visible under the content
8. If you scroll further down, you'll see the sponsors and partners

Payments
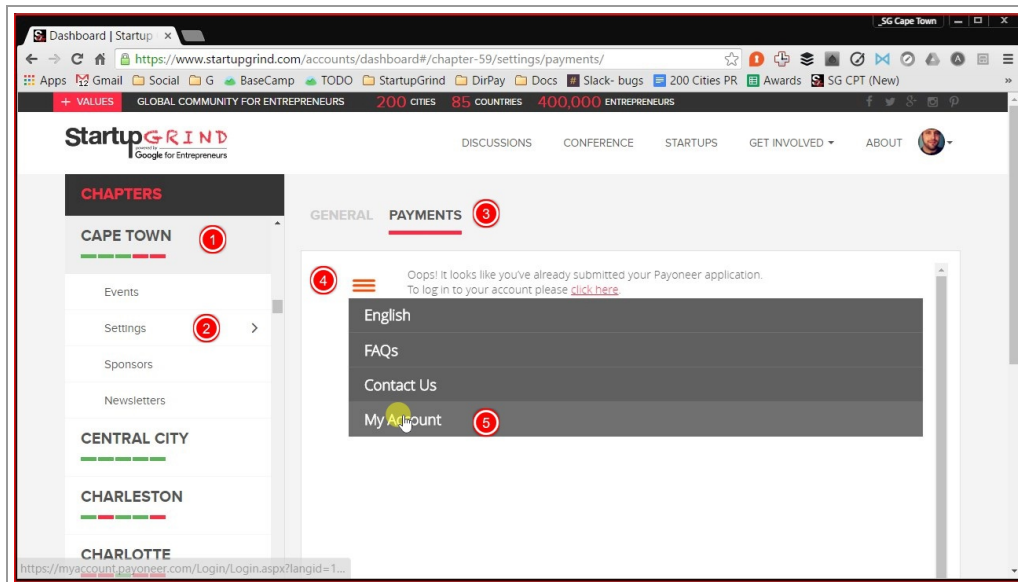
After wrapping up an event, or when a sponsor pays an invoice, you will recieve the money into your Payoneer account

1. Go to your chapter
2. Click on "Settings"
3. Click on the "Payments" tab.
You will only see this tab if you are the "Payment Lead", i.e. The chapter director. If there are other people connected to this chapter, like your co-director etc, then they will NOT see this tab.
4. On this screen, you will be asked to signup for a Payoneer account
PLEASE signup for a payoneer account WITHIN our system, as it then automatically connects your email, and your payoneer account to the Startup Grind system. If you already have a payoneer account, then please either signup for a new one with your startupgrind email (which is what will happen here) or reach out to Francisco or G in order to link the accounts up.
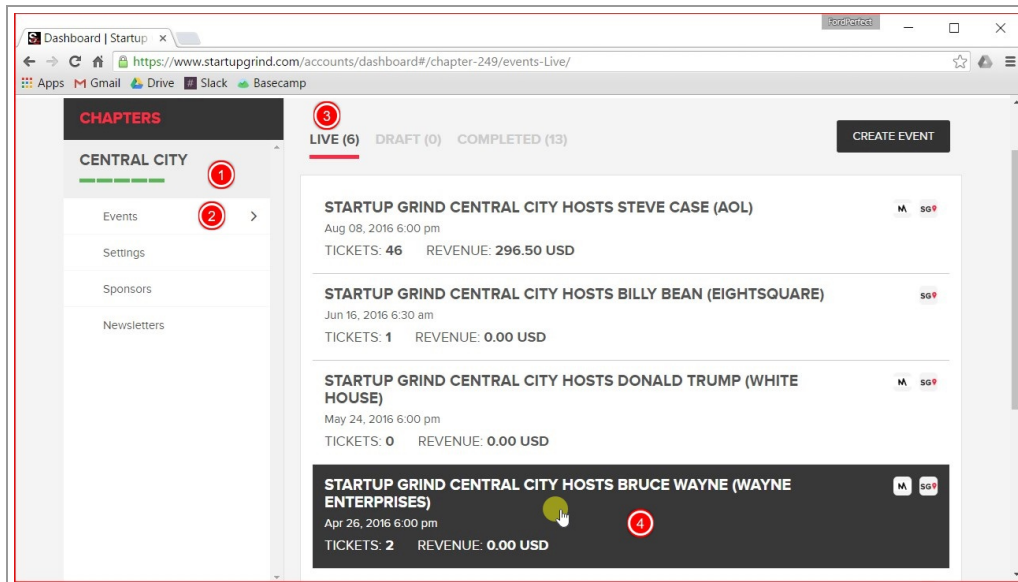5. If you have already signed up, and you are returning to this screen, then click the "Menu" button (point 4 in screenshot) and click on "My Account" in order to access your account on the payoneer site.

Payoneer
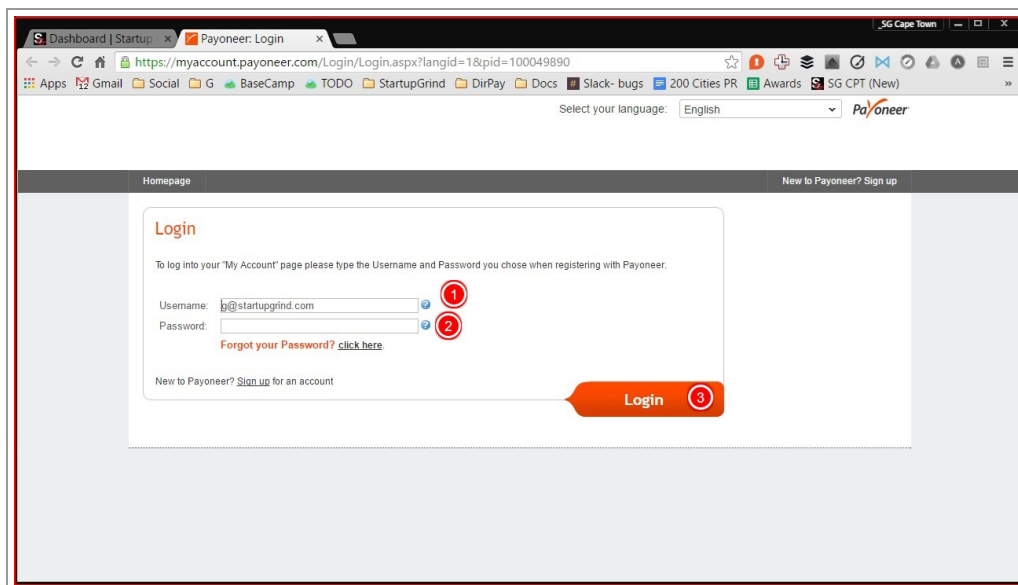
This is where you can then sign into your account with your Startup Grind email address and password, as set up when you signed up for the account.

Event Management

1. Select Your Chapter
2. Click "Events"
3. Select Live Events
4. Click on the event you wish to manage

Manage Tab
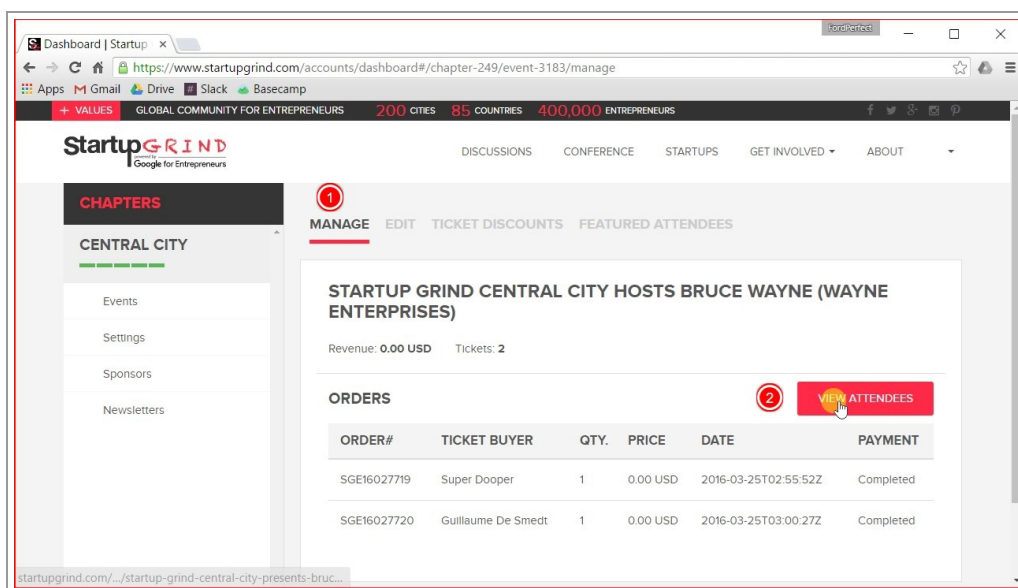
Here you can view the orders as well as total revenue and amount of tickets sold

1. Click Manage Tab
2. Click "View Attendees" to view a PDF that you can print out for your check-in table

Edit Tab

Here you can edit your event info
Click save to save changes.
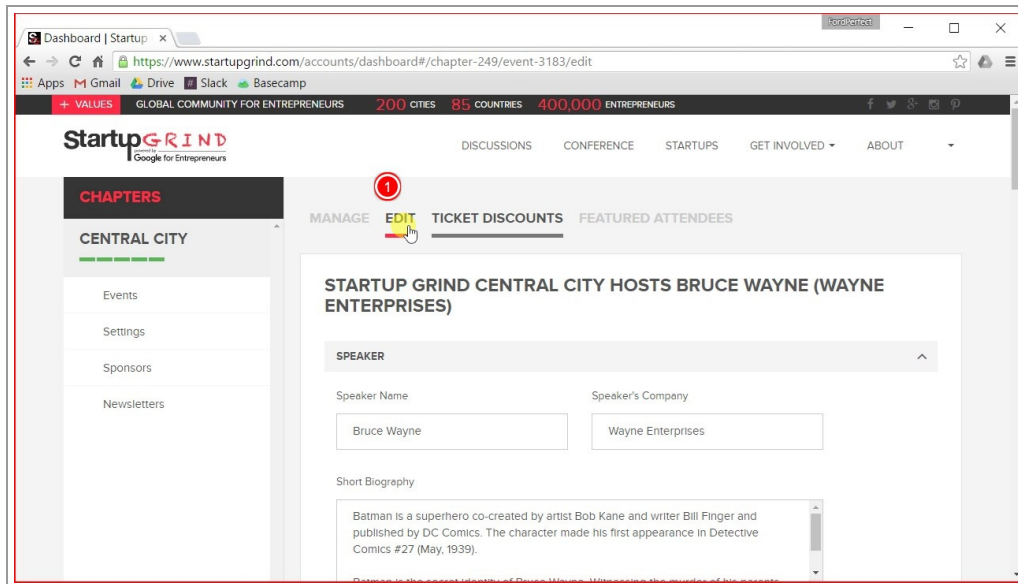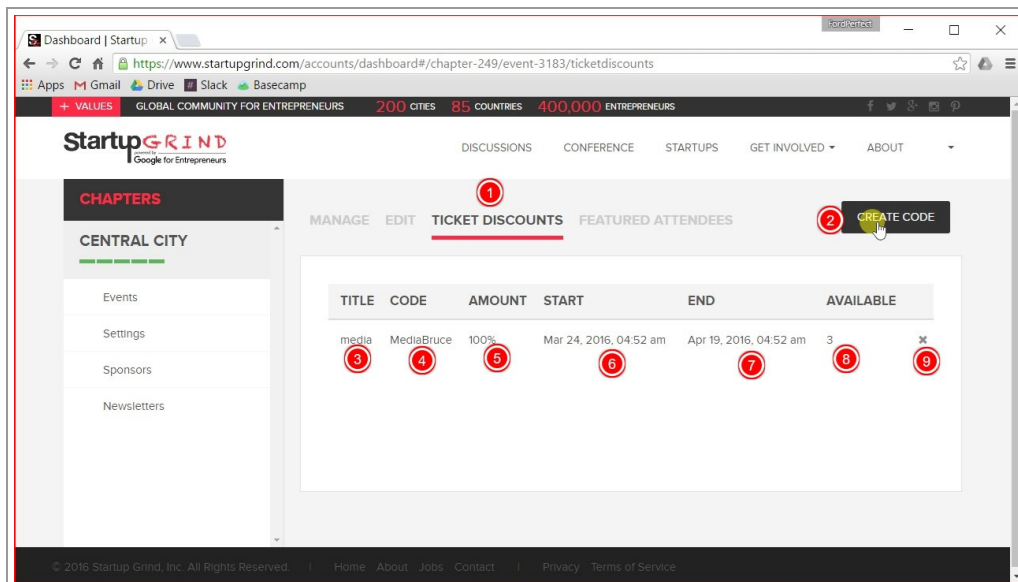
Ticket Discounts

Here you can manage your discount codes

1. Click the "Ticket Discounts" tab
2. Click "Create Code" to create more ticket discount codes
3. This is the 'Internal' Name
4. Code you can share with relevant parties
5. How much discount does the code carry, i.e. 100% or $10 off ticket price etc.
6. Start Date, that the code will work from
7. End Date, that the code will stop working
8. Amount of uses of this code left
9. Hit the (x) to delete this discount code

Ticket Discount Codes

1. Internal Code, For your eyes only ;)
2. Code that can be shared and entered into the "Discount Code" section of tickets site.
3. Take note that the code in step 2. is also appended to the URL. This URL can be shared with the relevant parties, which will enable the code to be instantly applied, and they do not need to enter it. Click on it, and see where it takes you.
4. Total amount of times this code can be redeemed
5. The discount amount
6. The discount amount can either be a currency value, or a percentage of full ticket price
7. The start date that the code will be valid from
8. The end date that the code will be valid until
9. Select "All Tickets Types" to apply this code to all the ticketing types
10. Alternatively, select the tickets that you wish thise code to apply to
Remember, if you apply it to the "early grinder" and the ticket is no longer valid, then the discount will also not work. So if you create a VIP PASS, then ensure that it will be valid on all the tickets that will be available up until the event takes place.
i.e. if early grinder date passes, ensure the discount code also works for the "late grinder" else your VIP will not be able to apply the code and use the code to buy relevant ticket.
11. Click the "Save" button to save this code.

Ticket Discounts Applied

Here is what the page looks like when your VIP, or MEDIA, or discounted attendee, clicks on the URL that you sent them

1. You can see the Discount Code is after the words "code-"
2 & 3. These are the tickets that have had the discount code applied to
4 & 5. Here you can see what the full price of the ticket was
6. as you can see, the ticket discount code was not applied to the "free tickets"
7. Alternatively, your VIP can type in the code here to make it apply to the tickets
8. Payment gateway options available for this event
9. Place to order the tickets

Featured Attendees
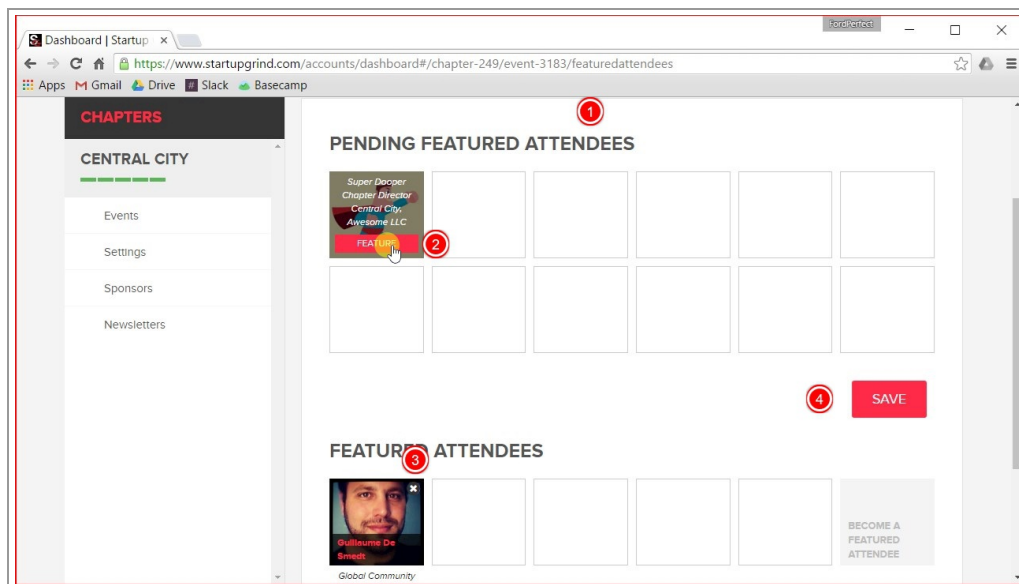
On the featured Attendees tab, you are able to feature, or unfeatured, an attendee.
When an attendee buys a ticket they are asked if they would like to be featured, and it's optional.

1. Within your event, click on the Featured Attendees tab
2. Click "Feature" to feature the attendee
3. Click the (x) to unfeature the attendee
4. Click Save when done

Please ensure that the attendee that would like to be featured has a proper image. No Corporate Logo's or Branding allowed.
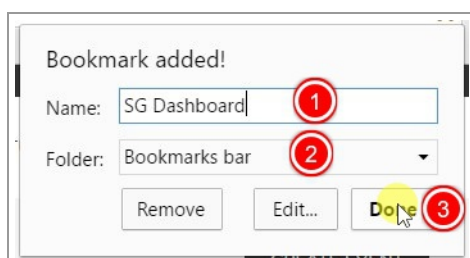
Bookmark Your Chapter
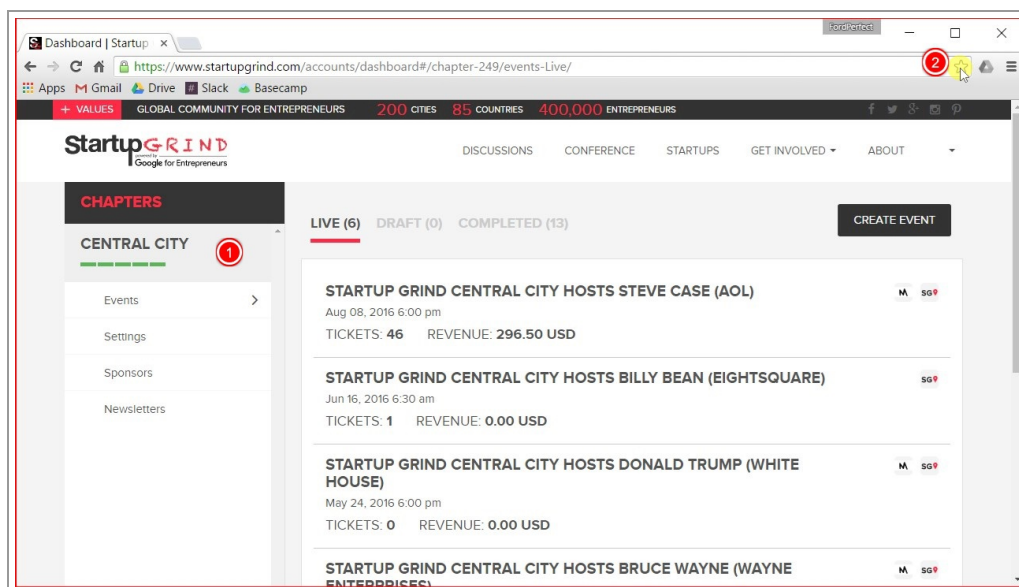
Bookmark your chapter to have instant access to your chapter's dashboard

1. Click on your chapter
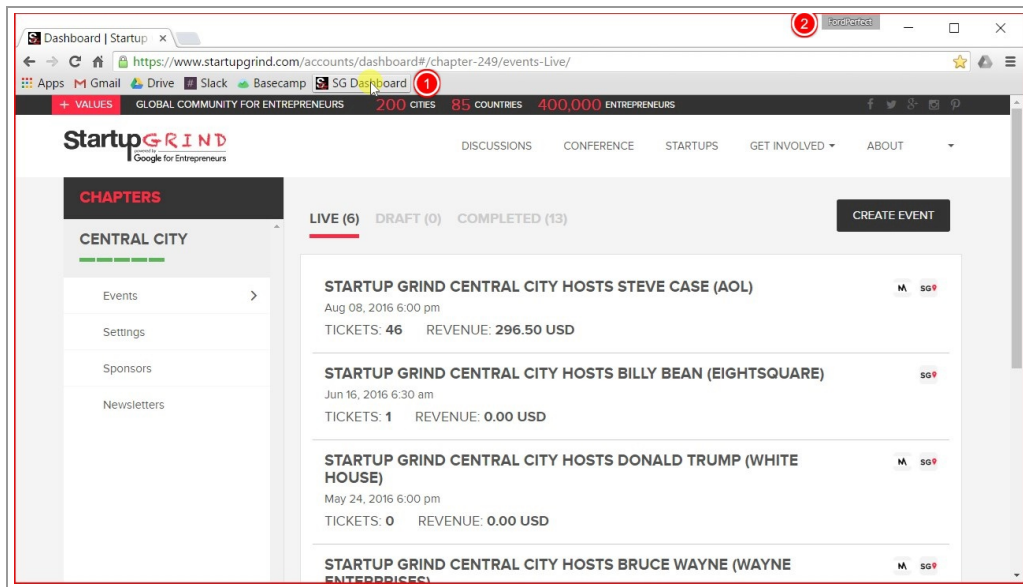2. Click on the Bookmark button (The Star)

Bookmark Details

This screen will pop up after hitting the bookmark button

1. Fill in an applicable name
2. Choose where to save the bookmark (Bookmarks bar is best)
3. Hit "Done"

Easy Access To Dashboard

1. You will see your bookmark here in your Startup Grind Chrome Profile
2. RIGHT click on your profile name to bring up a list of Chrome Users, this will allow you to change to your personal (or other) chrome profile