

# Grow North How-To Guide: Admin

## Guest

### Overview

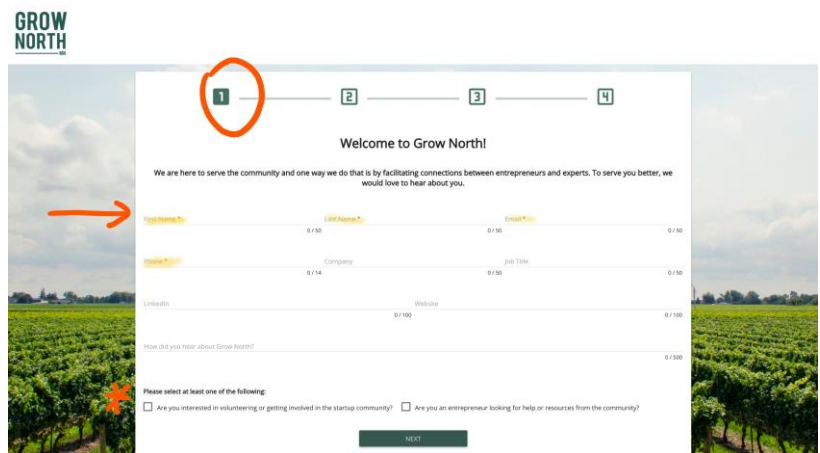
Guests that visit the website have access to a single page known as the Grow North Survey. The page acts as an intake form that Grow North uses to collect data from prospective volunteers and entrepreneurs. Upon submission, Grow North admins can review and make edits to the submissions before accepting them. However, one should ensure all selections and answers are accurate to prevent delays in receiving opportunities and resources from Grow North.

### Accessing the site

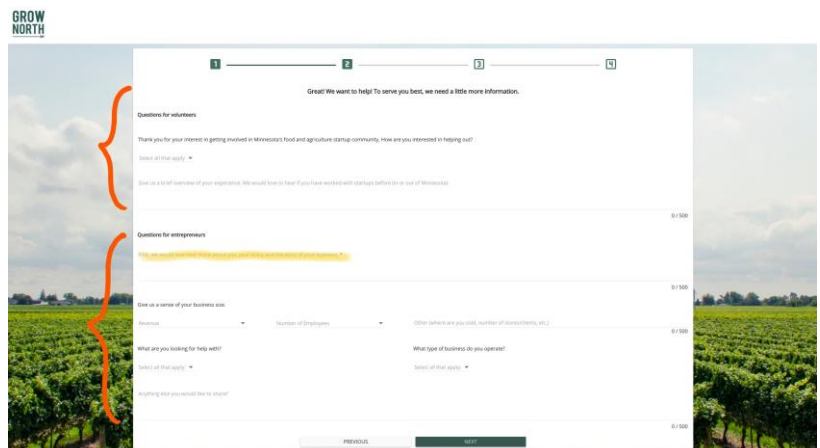
- Follow link from Grow North Website (<http://www.grownorthmn.com/>)

### Using the form

- The form contains 4 main pages and a confirmation screen
- You can navigate between pages using the previous or next buttons or the progress bar
  - Invalid form entries will inhibit navigation until corrected
- Many input fields are optional, but any marked with an \* (asterisk) must be completed
- Certain input fields have restrictions on what can be entered (email, phone, etc)
- If a required input field is left blank or invalid, you will be unable to proceed to the next page

A screenshot of the first page of the Grow North survey. The page has a header with the 'GROW NORTH' logo and a progress bar with four numbered steps (1, 2, 3, 4). Step 1 is circled in orange. Below the progress bar, the text reads 'Welcome to Grow North!' followed by a mission statement. The form contains several input fields: 'First Name', 'Last Name', 'Email', 'Phone', 'Company', 'Job Title', 'LinkedIn', and 'Website'. Each field has a character count (e.g., 0/50 for First Name). There are also checkboxes for 'Are you interested in volunteering or getting involved in the startup community?' and 'Are you an entrepreneur looking for help or resources from the community?'. A 'NEXT' button is at the bottom right. An orange arrow points to the 'First Name' field, and an orange asterisk is next to the 'Email' field.

- The questions on page 2 are determined by your checkbox selections on page 1
- Some fields have special means of input
  - Dropdowns
  - Checkboxes
  - Dropdowns containing checkboxes

A screenshot of the second page of the Grow North survey. The page has a header with the 'GROW NORTH' logo and a progress bar with four numbered steps (1, 2, 3, 4). Step 2 is highlighted in orange. Below the progress bar, the text reads 'Great! We want to help! To serve you best, we need a little more information.' The form is divided into two sections: 'Questions for volunteers' and 'Questions for entrepreneurs'. The 'Questions for volunteers' section includes a dropdown for 'Select all that apply', a text field for 'Share us a brief overview of your experience. We would love to hear if you have worked with startups before or on out of Minnesota', and a character count of 0/500. The 'Questions for entrepreneurs' section includes a dropdown for 'Select all that apply', a text field for 'What type of business do you operate?', and a character count of 0/500. There are also checkboxes for 'Over on a series of your business idea', 'Revenue', 'Number of Employees', and 'Other (where are you sold, number of locations, etc.)'. A 'PREVIOUS' button is at the bottom left, and a 'NEXT' button is at the bottom right. An orange bracket highlights the 'Questions for volunteers' section, and an orange asterisk is next to the 'Email' field.

- The third page requires that terms and conditions are read, understood, then accepted

**GROW NORTH**

1 — 2 — 3 — 4

### Terms and Conditions

The Grow North Community Database is a tool to drive connectivity in Minnesota. The information in the database will be used by Grow North and not given to any third party or be public to any other organization, including those included in the database. Inclusion in this directory is voluntary and will not result in any liability against Grow North, The Holmes Center for Entrepreneur or the University of Minnesota.

We are the sole owners of the information collected on this site. We only have access to collect information that you voluntarily give us via email or other direct contact from you. We will not sell or rent this information to anyone.

We will use your information to respond to you, regarding the reason you contacted us. We will not share your information with any third party outside of our organization, other than as necessary to fulfill your request, e.g. to ship an order.

Unless you ask us not to, we may contact you via email in the future to tell you about specials, new products or services, or changes to this privacy policy.

In no event shall Grow North, The Grow North Community Database does not assume any responsibility for the recommendations, referrals, or endorsements made by the connections created or advice given. We do not verify the license or the qualifications of any professional or business listed. Understand also that inclusion or omission of particular professionals, businesses, organizations, or services does not imply a recommendation, or lack of, by Grow North. You may opt out from this database or change data at any time - please contact Grow North directly at [hello@grownorthmn.com](mailto:hello@grownorthmn.com).

☐ I agree to these terms

PREVIOUS NEXT

- The final page allows you to confirm your information
  - It is imperative that entries are accurate so that Grow North can effectively use the data

**GROW NORTH**

1 — 2 — 3 — 4

### Please confirm your information.

**Contact Info**

Name Campbell  
 campbellkatharine@gmail.com  
 6122453852  
 Student  
 Prime Academy  
 LinkedIn: linkedin.com/company/katharinecampbell  
 Website: kathyprimo.com

How did you hear about Grow North?  
 Through Prime

Are you interested in volunteering or getting involved in the startup community?  
 Yes

Are you an entrepreneur looking for help or resources from the community?  
 No

**Questions for volunteers**

How are you experienced in helping out?  
 Accompanying the city of event

Give us a brief overview of your experience.  
 Enter your experience here

Anything else you would like to share?  
 Enter any other info here

PREVIOUS SUBMIT

# Admin

## Overview

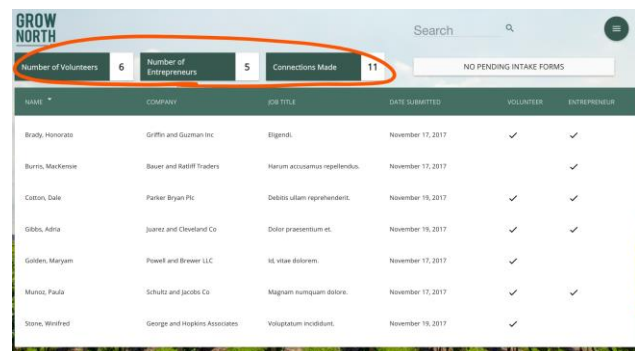
Admin can use the app to complete a variety of tasks via an administrative dashboard. They are able to review form submissions for accurate and legitimate information before approving them. After approval the listings appear in a directory, where the admin can search and sort entries. When an entry is clicked, a dialog box appears which organizes information in relevant tabs. The first tab contains contact information. The second has both contact info and survey responses with the option to edit both. The third tab contains a place for the admin to view, edit and add notes along with searchable tags. The fourth tab allows the admin to edit, add and track connections between clients. The dashboard also contains metrics including number of volunteers, entrepreneurs and connections. There is also a menu button which allows the user to navigate to the survey, edit admin account information and logout.

## Accessing the app

- App can be viewed in browser by going to: <http://grownorth.herokuapp.com>

## Using the app

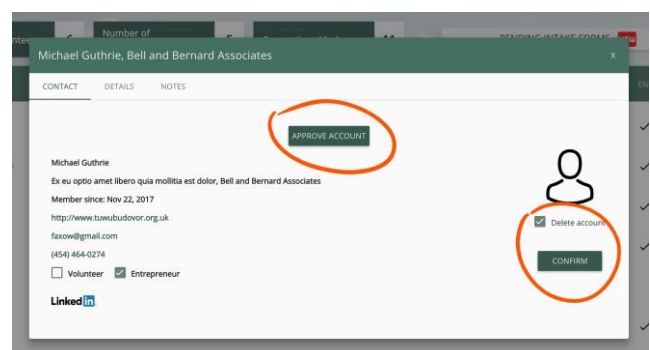
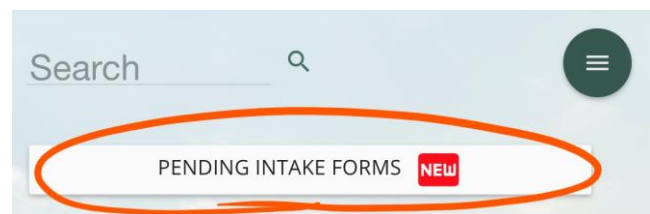
- Metrics can be viewed in the top-left corner of the dashboard
- Metrics tracked include number of volunteers, number of entrepreneurs and number of connections.



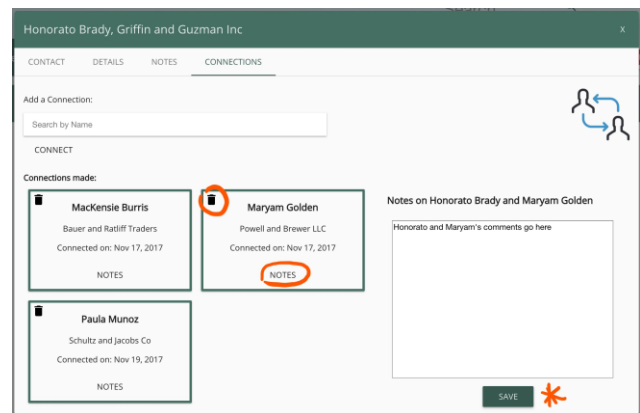
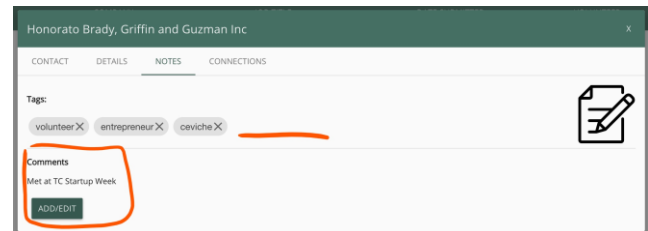
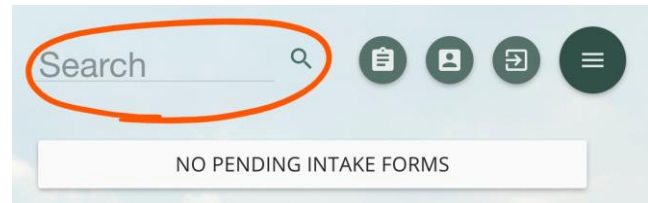
The screenshot shows the GROW NORTH dashboard. At the top left, there are three metrics: Number of Volunteers (6), Number of Entrepreneurs (5), and Connections Made (11). These are circled in orange. To the right is a search bar and a button that says "NO PENDING INTAKE FORMS". Below this is a table with columns: NAME, COMPANY, JOB TITLE, DATE SUBMITTED, VOLUNTEER, and ENTREPRENEUR. The table contains several rows of data.

NAME	COMPANY	JOB TITLE	DATE SUBMITTED	VOLUNTEER	ENTREPRENEUR
Brady, Monique	Griffin and Guzman Inc.	Eligendi	November 17, 2017	✓	✓
Burris, Mackenzie	Bauer and Ratliff Traders	Harum accusamus repellendus	November 17, 2017		✓
Cotton, Dale	Parker Bryan PLC	Debitis ullam reprehenderit	November 19, 2017	✓	✓
Gibbs, Adria	Juarez and Cleveland Co	Dolor praesentium et	November 19, 2017	✓	✓
Golden, Maryam	Powell and Brewer LLC	Ut vitae dolorum	November 17, 2017	✓	
Munoz, Paula	Schultz and Jacobs Co	Magnam numquam dolore	November 17, 2017	✓	✓
Stone, Winifred	George and Hopkins Associates	Voluptatum incidunt	November 19, 2017	✓	

- Review and approve via the “pending intake forms” button located in the top right corner of the dashboard
- When pending forms are present, a red notification badge will appear
- Click on the button to display a list of pending forms
- Click on a listing to view the pending profile view where you can review and edit the listing
- The listing can be either deleted or approved and sent to the directory



- Within the dashboard, a search bar is present in the top-right corner of the screen that instantly searches directory items.
- The search bar can be used to find entries based on their contact info and tags
- Clicking on a listing in the directory portion of the dashboard allows the admin to view and edit profile information in the following tabs:
  - Contact: contains contact card
  - Details: View and edit contact and survey info
  - Notes: View, add, edit and delete notes and tags
  - Connections: View, add, and delete tracked connections made between clients; View, add and edit notes for each connection



- Menu button located in top-right corner allows admin to perform the following actions:
  - Visit survey
  - Edit admin account
  - Logout

