Vanco Mobile User Guide

Contents

Getting started

Vanco Mobile will send you a text message or an email inviting you to join an organization on behalf of someone in your 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 or email invite, you don't have to search for Vanco Mobile in your App or Play store (step 1). The invite contains a link taking you right to the Vanco Mobile app.

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

Join an organization

1. On the Welcome screen, tap **Find your organization**.
2. On the **Search Organizations** screen, enter your organization's name.
3. In the search results, tap your organization's name.
4. You have two options to join:
   a. If you have an invite code, tap **Enter Church Invite Code**, enter the code, and then tap **Join Organization**. On the **Login** screen, tap **Sign Up**, fill in your credentials (see Note below) and then tap **Sign Up** again. You are taken to the Groups & Chat screen of your organization.
   b. If you do not have an invite code, tap **Request to join**. On the **Login** screen, tap **Sign Up**, fill in your credentials (see Note below) and then tap **Sign Up**. This sends a message to your administrator. When the administrator accepts your request, you are sent an email and upon opening the app, you are taken to the Groups & Chat screen of your organization.

NOTE: If you have a Service Center, MyVanco, or Vanco Online account, use those credentials to log in to Vanco Mobile. Instead of tapping **Sign up**, tap **Log in** and enter your email and password.

App Navigation

To move between areas in Vanco Mobile, tap the applicable icon at the bottom of the screen. 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
💬	**Groups & chat** – view and manage your groups and chat messages.
📅	**Calendar** – view and manage your events.
💲	**Donate** –If your organization is part of MyVanco and has donation functionality configured, you can donate within the mobile app.
👤	**Directory** – view a listing of organization members. Send a chat message to one of the members.
📥	**Inbox** – displays invites to groups and broadcast messages from your administrator.

Manage your profile

1. From any screen within Vanco Mobile, tap the bar menu ☰.
2. Tap **Profile**.
3. (Optional) Add a picture or avatar of yourself.
   a. Tap **Change profile photo** 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.
4. To update your name, address, or phone information, tap **Update profile**, make your edits, and tap **Save profile**.
5. To update how you are displayed in the directory, toggle each option accordingly:
   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.
6. When finished, tap **Done**.

Sign out

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

Leave an organization

1. From any screen within Vanco Mobile, tap the bar menu ☰.
2. Tap **Organizations**.
3. Swipe left across the organization you are leaving.
4. Tap **Leave organization**.
5. Confirm your selection by tapping **Yes, leave**.

Switch between organizations

You can belong to more than one organization, but you can be logged into **only** one at a time. When you switch to your other organization, Vanco Mobile logs you out of your current organization and you are required to log in to the other organization.

1. From any screen within Vanco Mobile, tap the bar menu ☰.
2. Tap **Organizations** and tap the organization from your list.
3. On the **Login** screen, enter your credentials, and then tap **Log in**.

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 members

NOTE: Allowing members to create groups is controlled by a setting that your administrator can enable or disable.

If you do not see the plus button ➕, you do not have permissions to create groups.

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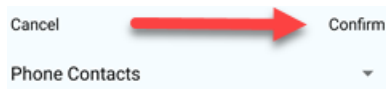3. (Optional) Tap **Description** and provide a description for the group.

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. You have 3 options.

    - Invite existing organization users

        a. For **Source**, leave **Existing Users** and tap your recipients from the list displayed.
        b. When finished, tap **Send {#} invites**. The send button displays the number of invites.

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

    - Invite people using a phone number or email

        a. Click the **Enter a phone number or email** link.
        b. Enter the email or phone number.
        c. Click **Send Invite**.

           Recipients receive an email or text invite with a link to the app.

    - Invite people from your contacts list.

        a. For **Group**, select the applicable group.
        b. Tap **Source** and in the dialog box, tap the down arrow and select **Phone Contacts**.

        c. Tap **Confirm**.
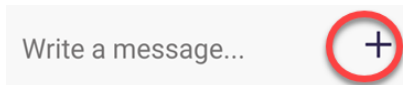

        d. Tap your recipients from the list displayed.
        e. When finished, tap **Send {#} invites**. The send button displays the number of invites.

           Recipients receive a text invite with a link to the app.

Invite someone to a group
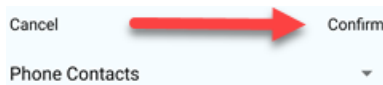
You can invite organization members to a group.

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

Write a message...   +

3. Select 👤⁺ Invite .
4. On the **Invite users** screen, tap **Manage groups** and select those whom you are inviting. You have 3 options for invites.

- Invite existing organization users

    a. For **Source**, leave **Existing Users** and tap your recipients from the list displayed.
    b. When finished, tap **Send {#} invites**. The send button displays the number of invites.
       Recipients receive an invite in their **Inbox**.

- Invite people using a phone number or email

    a. Click the **Enter a phone number or email** link.
    b. Enter the email or phone number.
    c. Click **Send Invite**.
       Recipients receive an email or text invite with a link to the app.

- Invite people from your contacts list.

    a. For **Group**, select the applicable group.
    b. Tap **Source** and in the dialog box, tap the down arrow and select **Phone Contacts**.

Cancel   Confirm

Existing Users   ▼   > >   Existing Users

                                                       Phone Contacts

    c. Tap **Confirm**.

Cancel   Confirm

Phone Contacts   ▼

    d. Tap your recipients from the list displayed.
    e. When finished, tap **Send {#} invites**. The send button displays the number of invites.
       Recipients receive a text invite with a link to the app.

TIP: You can also invite people to join a group from within the **Directory**.

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** and swipe left on the group you are leaving.
2. Tap **Leave group**.
    OR

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 with the appropriate permissions, 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. Also, you can add a limit to the number of attendees for any of your events.

> **NOTE**: Allowing members to create events is controlled by a setting that your administrator can enable or disable.
>
> If you do not see the plus button ✚, you do not have permissions to create events.

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** on and enter the date and start time.
8. If your members can bring guests, toggle **Allow additional guests** on.
9. If you want to limit the number of attendees, toggle **Limit number of guests** on and for **Select maximum attendees**, enter the maximum number.
10. 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 under **Confirm**, tap the down arrow to display all groups.

    b. Tap the applicable group and then tap **Confirm**.
11. 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.
12. Tap **Description** and provide information about the event.

13. (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.
14. Tap **Save** and then **OK**.

Edit an event

You can edit event information for events that you created.

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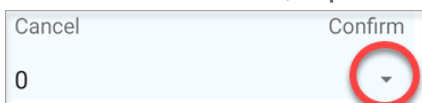3. Make your edits and when finished, tap **Save**.

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.

If the event has an attendee limit, the calendar shows the number of remaining spaces. If the number remaining is 0, you won't be able to RSVP for the event.
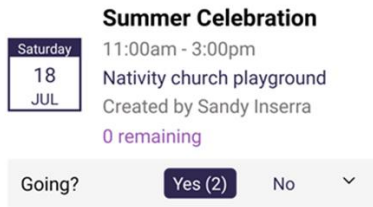
> **NOTE**: The first time you respond yes to an event, Vanco Mobile asks for permission to access your calendar. If you allow access, Vanco Mobile can add the event to your calendar. If you deny access, Vanco Mobile cannot add the event to your calendar, however you may do so yourself.

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 guests, include the number you are bringing:
     a. Tap **Edit attendees**.
     b. Under **Confirm**, tap the down arrow, and then tap the number of guests.

     c. Tap **Confirm**.

The **Yes** button is updated with the number of guests you selected.

Summer Celebration

Saturday
18
JUL

11:00am - 3:00pm
Nativity church playground
Created by Sandy Inserra
0 remaining

Going?   Yes (2)   No   ∨

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 📥

Donate functionality is configured in the MyVanco application. If your organization is not a MyVanco customer, this feature may not be available for you. Contact your administrator if you have questions.

1. Tap **Donate** 📥.
1. Enter the dollar amount.
2. Tap **Give to** and select the fund.
3. Tap **Frequency** and select the desired option.
4. If your donation is for a future date, or you are donating on a recurring basis, tap the **Starting {date}** field and select the applicable date.
5. Tap **Enter payment method** and select your **Payment method**. Or, if you have a stored payment method, tap **Payment method,** and make your selection.
6. Enter the payment information.

NOTE: If you are making a scheduled or recurring payment, you must select **Save this payment method**.

7. Tap **Use this card** or **Use this account**.
8. If you wish to help cover processing fees attached to payment processing, toggle **Cover processing fees** on. This option is only visible if your organization has enabled the feature.
9. Tap **Give** <$dollar amount>.
10. To complete the process, tap **Submit**.

View scheduled transactions

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

Under the **Scheduled** tab, Vanco Mobile displays a listing of your scheduled transactions.

Cancel a scheduled transaction

1. From any screen within Vanco Mobile, tap the bar menu ☰.
2. Tap **Transactions**.
3. Under the **Scheduled** tab, locate the transaction and tap **Cancel**.
4. Confirm your action by tapping **Yes, cancel**.

View transaction history

1. From any screen within Vanco Mobile, tap the bar menu ☰.
2. Tap **Transactions**.
3. Tap the **History** tab.

Save a payment method

If you are creating a scheduled or recurring transaction, Vanco Mobile requires that you save a payment method. This is done as you are creating the transaction.

1. Tap Donate 🖰.
2. Enter the dollar amount.
3. Tap **Give to** and select the fund.
4. Tap **Frequency** and select the desired option.
5. Tap **Enter payment method** and select your **Payment method**.
6. Enter the payment information.
7. Select **Save this payment method**.
8. Tap **Use this card** or **Use this account**.
9. Complete your transaction.

View payment methods

1. From any screen within Vanco Mobile, tap the bar menu ☰.
2. Tap **Payment methods**.

Delete a payment method

You can delete a payment method if there are no scheduled or recurring transactions using that payment method.

1. From any screen within Vanco Mobile, tap the menu ☰.
2. Tap **Payment methods**.
3. Tap the x next to the applicable payment method.
4. Confirm your action by tapping **Remove**.

Directory 🖼️

The **Directory** lists all your organization's members. From the directory you can send a chat message to a member, invite people to join the organization or join a group. 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**: You can choose to be hidden from the **Directory**. This setting is found under **Profile** > **Hide me from directory**. The default, however, is to show all members.

Invite someone to join the organization

> **NOTE**: Allowing members to invite others to join your organization is controlled by a setting that your administrator can enable or disable.
>
> If you do not see the plus button 🖼️, you do not have permissions to do this.

You can invite someone from your phone book to join your organization or you can invite someone using their phone number, or email.

1. Tap **Directory** and then tap 🖼️.
2. On the **Invite users** screen, tap **Invite new users**.
3. If you are inviting someone from your phone book, tap their name, and then tap **Send 1 invites**.
4. If you are inviting someone using their phone number, tap **Enter a phone number or email**, enter the number or email, and then tap **Send invite**.

Recipients receive an invite text or an invite email with a link and a code to install and launch Vanco Mobile. Use the code from the invite to search for your organization and quickly become part of the community.

Invite someone to join a group

1. Tap **Directory** and then tap 🖼️.
2. On the **Invite users** screen, tap **Manage groups** and select those whom you are inviting. You have 3 options for invites.

   - Invite existing organization users

     a. For Source, leave Existing Users and tap your recipients from the list displayed.

b. When finished, tap **Send {#} invites**. The send button displays the number of invites.

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

- Invite people using a phone number or email

  a. Click the **Enter a phone number or email** link.
  b. Enter the email or phone number.
  c. Click **Send Invite**.

  Recipients receive an email or text with a link to the app.

- Invite people from your contacts list.

  a. For **Group**, select the applicable group.
  b. Tap **Source** and in the dialog box, tap the down arrow and select **Phone Contacts**.

c. Tap **Confirm**.

d. Tap your recipients from the list displayed.
e. When finished, tap **Send {#} invites**. The send button displays the number of invites.

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

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.

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 or by phone at 800.675.7430.