

GrowthZone: Info Hub Part 2: Tour and Management

Info Hub: Tour & Management Agenda

Creating an account and logging in

Info Hub Tour

- My Info
- My Directory Listings
- My Subscriptions
- Events
- Forum*
- Continuing Education**

Info Hub Tour (cont.)

- Reports
- Directories
- Resources
- Web Content (Coupons, Job Postings, etc)**
- Links

Info Hub Management

* Optional; included in every GrowthZone subscription but must be enabled to use

** Additional module subscription required to implement these features on the Info Hub

Info Hub – Creating an account/Logging In

The ability to create an account for the Info Hub is set in the Login Settings area. Enabling the “Allow Contacts to create their own accounts via the Info Hub” setting will allow contacts in your database to create their accounts using their email on file.

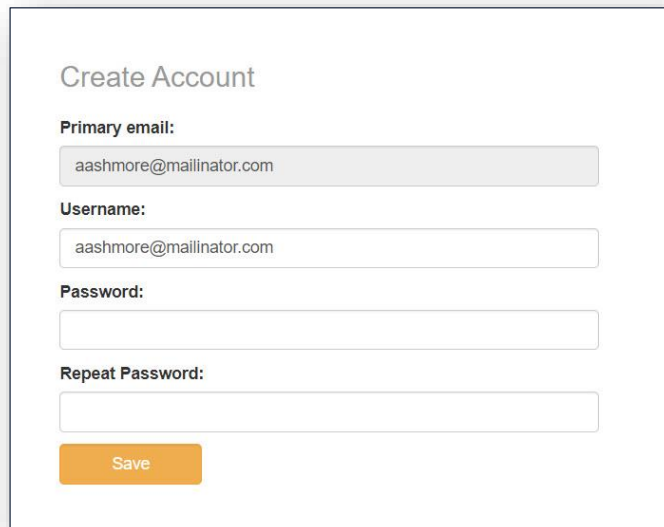
Knowledge Base: [Set up User Info Hub Login Settings](#)

Info Hub – Creating an account/Logging In

Users will need to create an account in order to use the Info Hub.

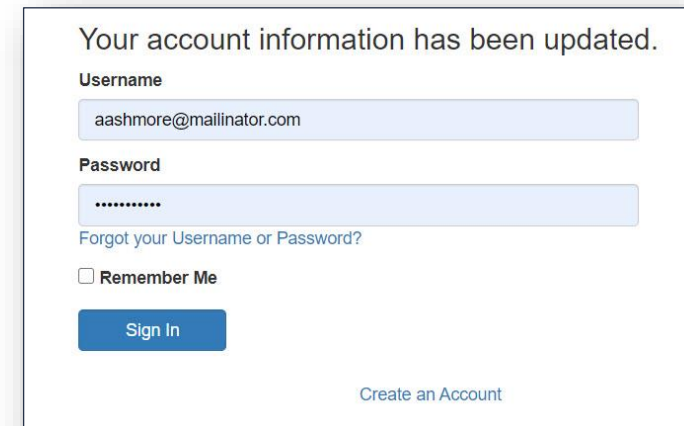
Send out the invitation email with the Create Login link. Recipients will have 72 hours to create their account using this link.

Users will input their desired password, then will be automatically redirected to log in to the Info Hub.



The screenshot shows a 'Create Account' form with the following fields and elements:

- Create Account** (Section Header)
- Primary email:** Input field containing 'aashmore@mailinator.com'
- Username:** Input field containing 'aashmore@mailinator.com'
- Password:** Empty input field
- Repeat Password:** Empty input field
- Save** (Orange button)

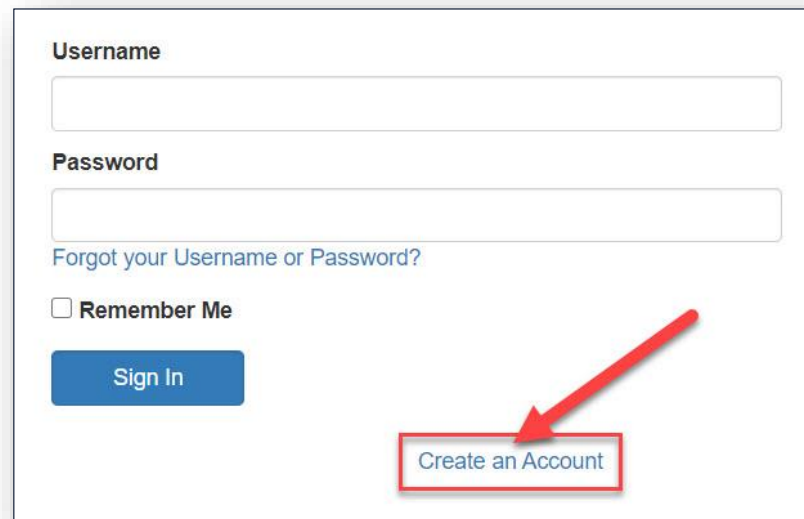


The screenshot shows a 'Sign In' form with the following fields and elements:

- Your account information has been updated.
- Username:** Input field containing 'aashmore@mailinator.com'
- Password:** Input field containing '.....'
- [Forgot your Username or Password?](#)
- Remember Me**
- Sign In** (Blue button)
- [Create an Account](#)

Info Hub – Creating an account/Logging In

Users can also create an account by clicking the “Create Account” link on the generic Info Hub Login screen.

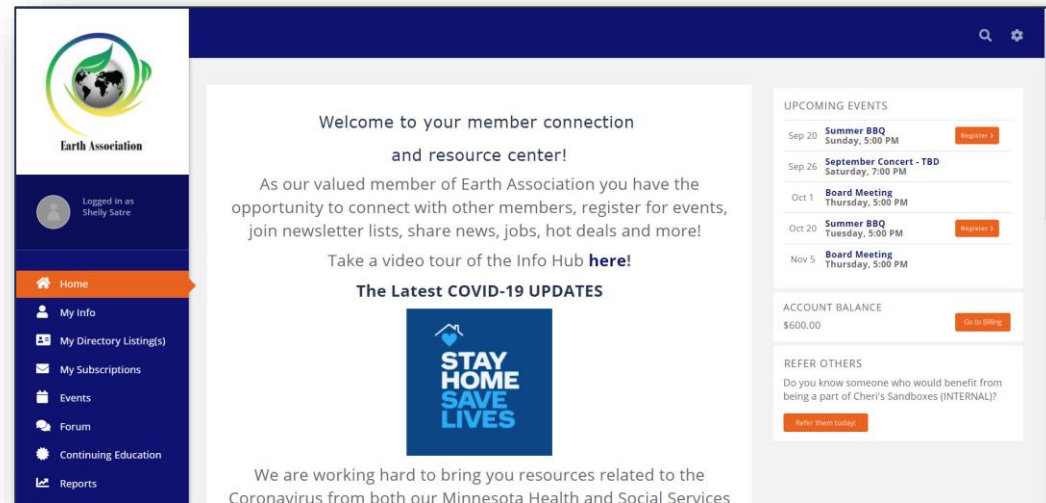


The screenshot displays a login form with the following elements:

- Username**: A text input field.
- Password**: A text input field.
- [Forgot your Username or Password?](#): A blue link.
- Remember Me**: A checkbox.
- Sign In**: A blue button.
- [Create an Account](#): A link highlighted with a red box and a red arrow pointing to it.

Info Hub - Tour

After logging in, members will be taken to the Home page of the Info Hub and will see any messages/links/images/videos as configured.

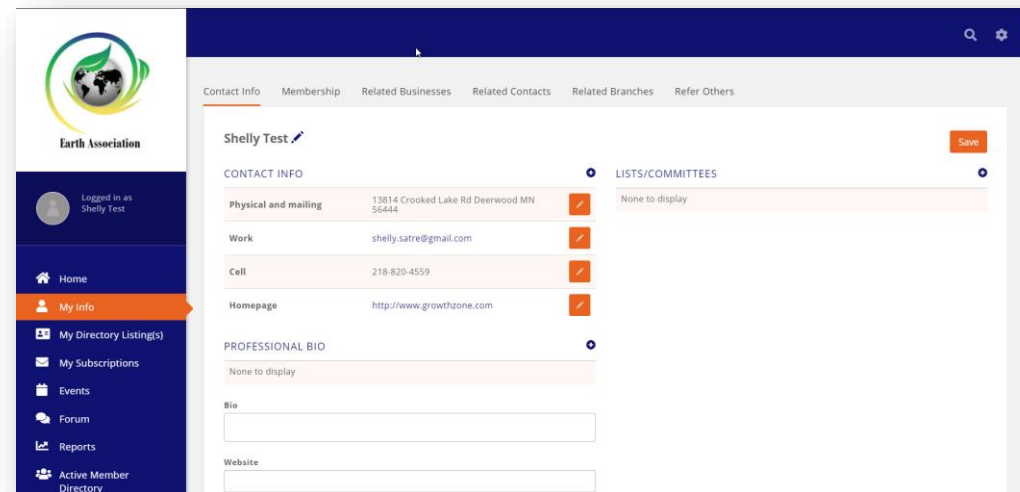


Knowledge Base: Customize Info Hub Display
Customize Info Hub Home Page

Info Hub - Tour

My Info:

This is where your members can see everything related to their information. (View/edit/update ability will vary depending on access level granted.)

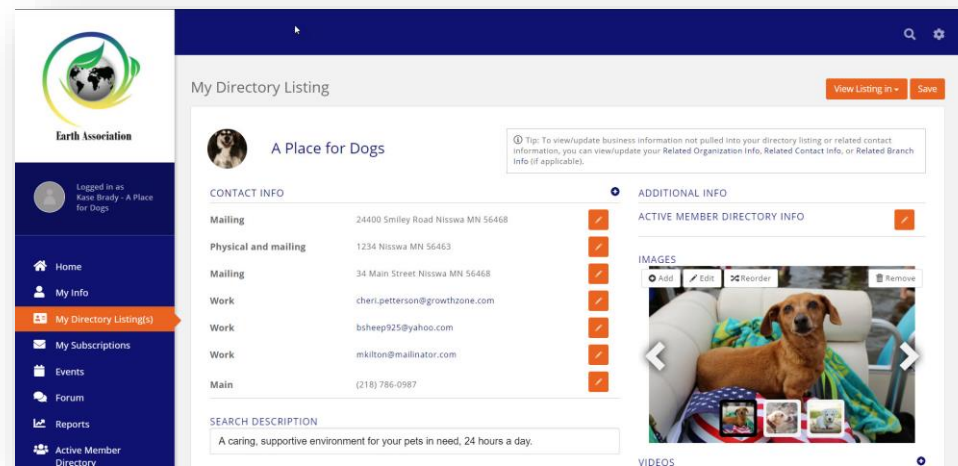


Knowledge Base: [Update Contact Information in the Info Hub](#)

Info Hub - Tour

My Directory Listing(s):

If your members have Directory Listings and are given access, they can edit/update the information being displayed online for themselves or their company/companies.

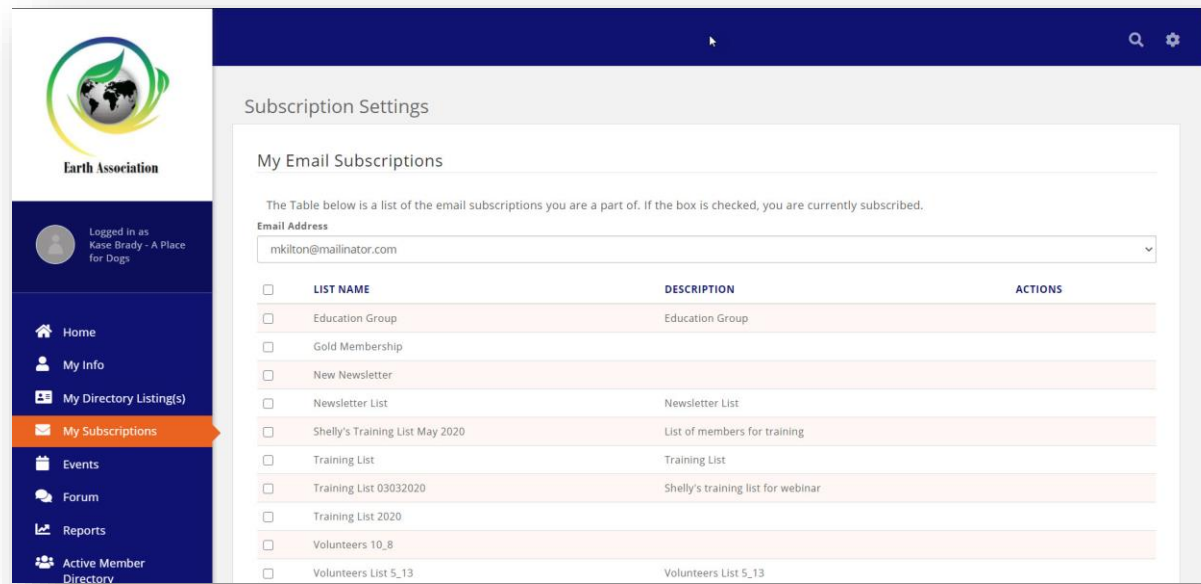


Knowledge Base: [Update Directory Listing Information in the Info Hub](#)

Info Hub - Tour

My Subscriptions:

Members may see and manage which email lists from which they receive communications.



The screenshot displays the 'Subscription Settings' page. On the left is a navigation menu with 'My Subscriptions' highlighted. The main content area is titled 'My Email Subscriptions' and includes a dropdown for 'Email Address' set to 'mkilton@mailinator.com'. Below is a table of subscriptions:

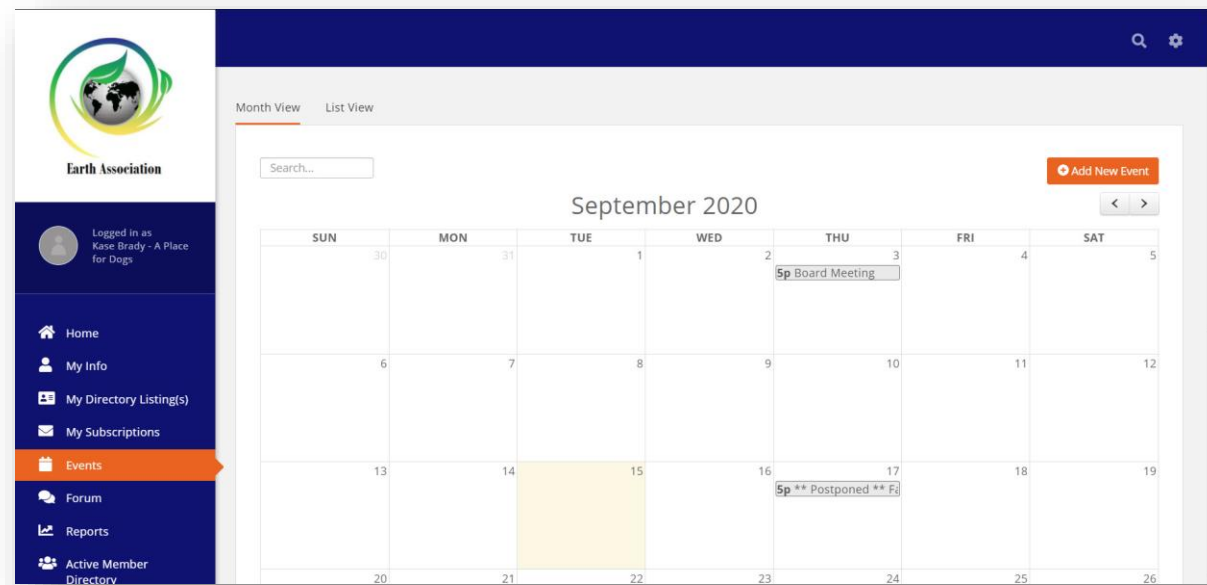
| <input type="checkbox"/> | LIST NAME | DESCRIPTION | ACTIONS |
|--------------------------|---------------------------------|------------------------------------|---------|
| <input type="checkbox"/> | Education Group | Education Group | |
| <input type="checkbox"/> | Gold Membership | | |
| <input type="checkbox"/> | New Newsletter | | |
| <input type="checkbox"/> | Newsletter List | Newsletter List | |
| <input type="checkbox"/> | Shelly's Training List May 2020 | List of members for training | |
| <input type="checkbox"/> | Training List | Training List | |
| <input type="checkbox"/> | Training List 03032020 | Shelly's training list for webinar | |
| <input type="checkbox"/> | Training List 2020 | | |
| <input type="checkbox"/> | Volunteers 10_8 | | |
| <input type="checkbox"/> | Volunteers List 5_13 | Volunteers List 5_13 | |

Knowledge Base: [Manage Email Subscriptions in the Info Hub](#)

Info Hub - Tour

Events:

Members may view, register for, and submit events for approval.

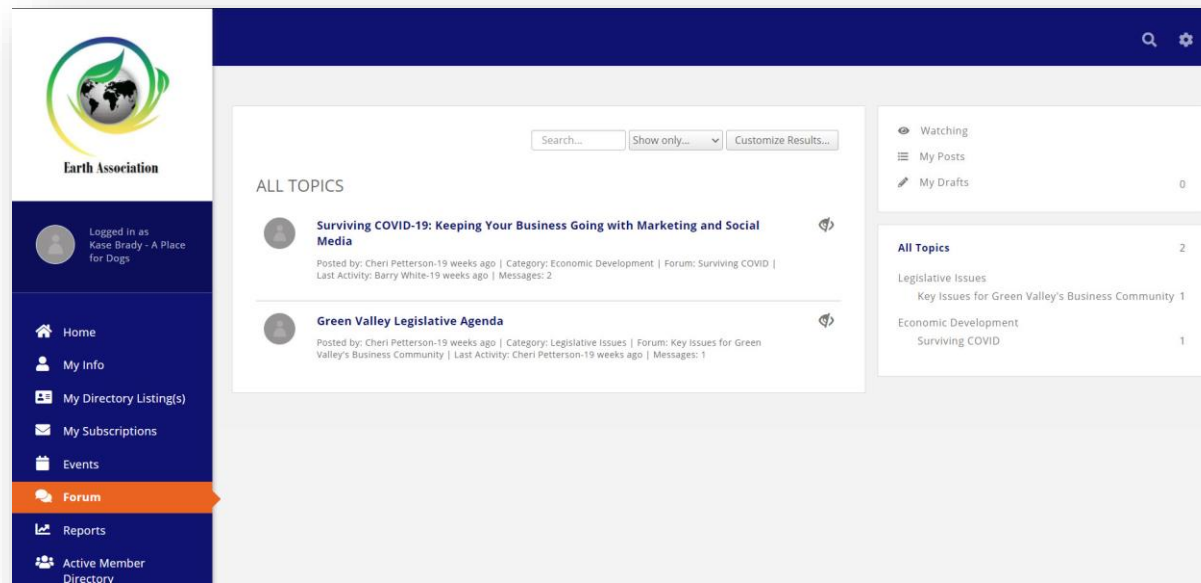


Knowledge Base: [Manage Events in the Info Hub](#)

Info Hub - Tour

Forum:

The Forum is an optional component of the Info Hub; when enabled, members can participate in online discussions with other members.

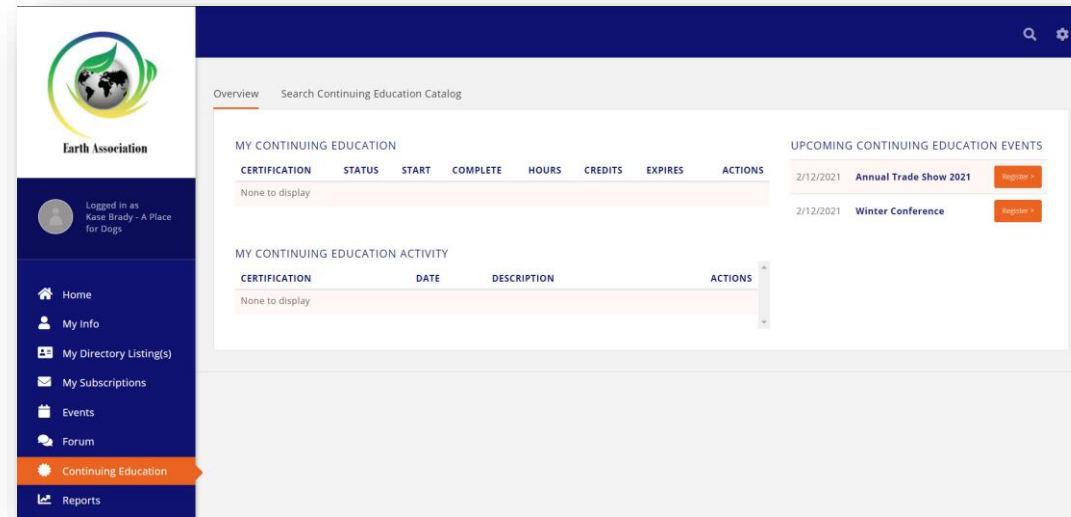


Knowledge Base: [Info Hub Forum Overview](#)

Info Hub - Tour

Continuing Education**:

You can allow your members to view their certification progress and register for upcoming continuing education events.



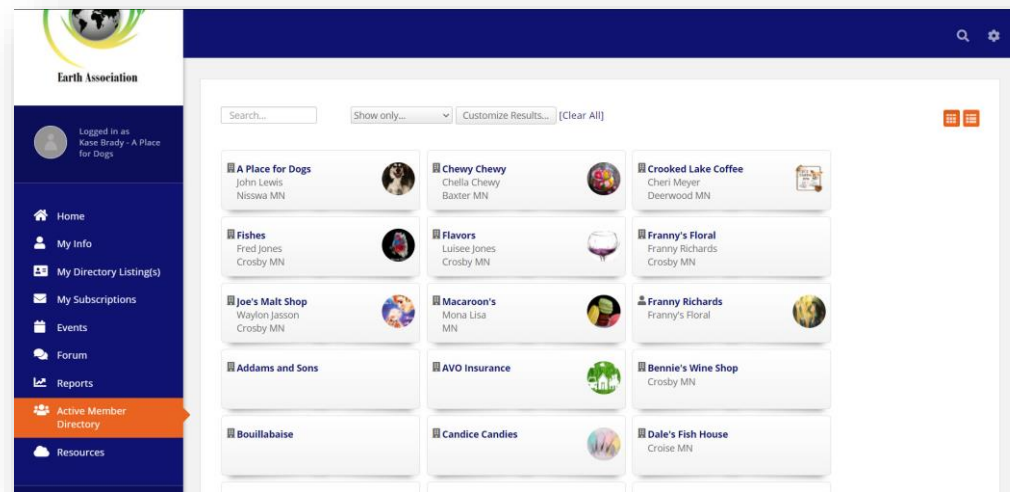
Knowledge Base: [View Certifications in the Info Hub](#)

**Requires subscription to the Continuing Education module

Info Hub - Tour

Directories:

Any and all directories you have set to be displayed in the Info Hub are available. Members can search and customize results to find fellow members and their businesses or organizations.

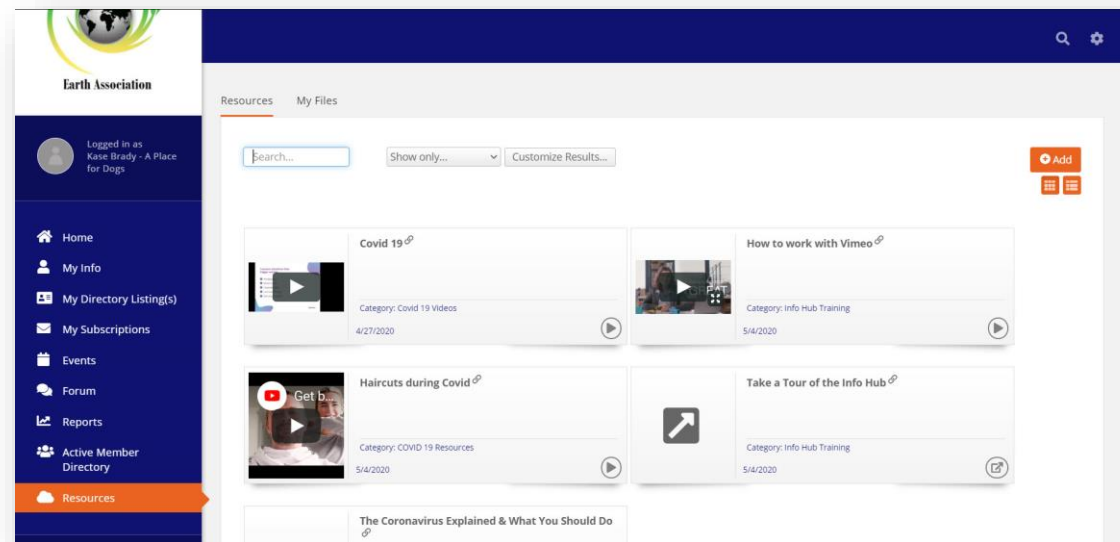


Knowledge Base: [Create a New Directory](#)

Info Hub - Tour

Resources:

Members may view and add shared files/links depending on their access level abilities.

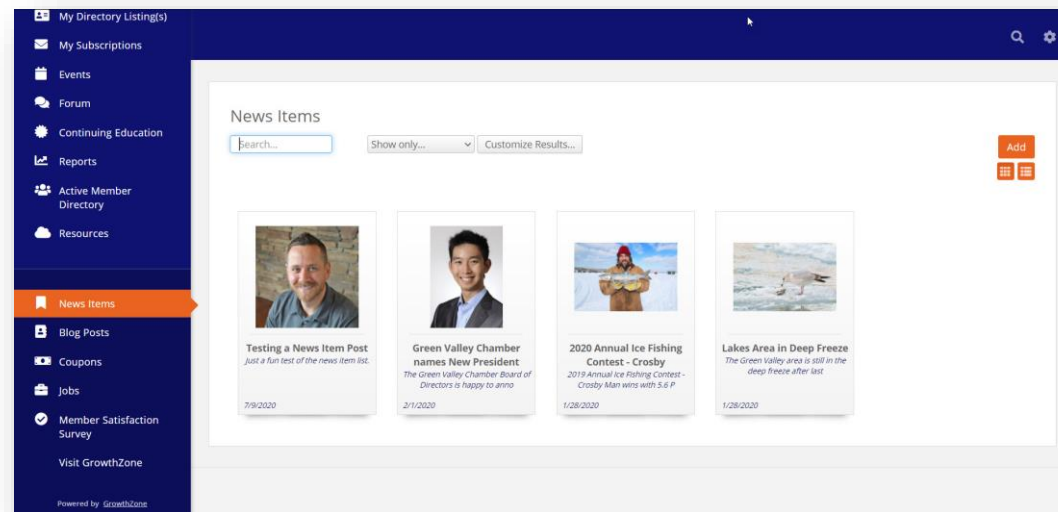


Knowledge Base: [View Resources in the Info Hub](#)

Info Hub - Tour

Web Content**:

Content lists (Jobs Postings, Coupon Deals, News, Blogs, General) can be shared to the Info Hub for/by your members.



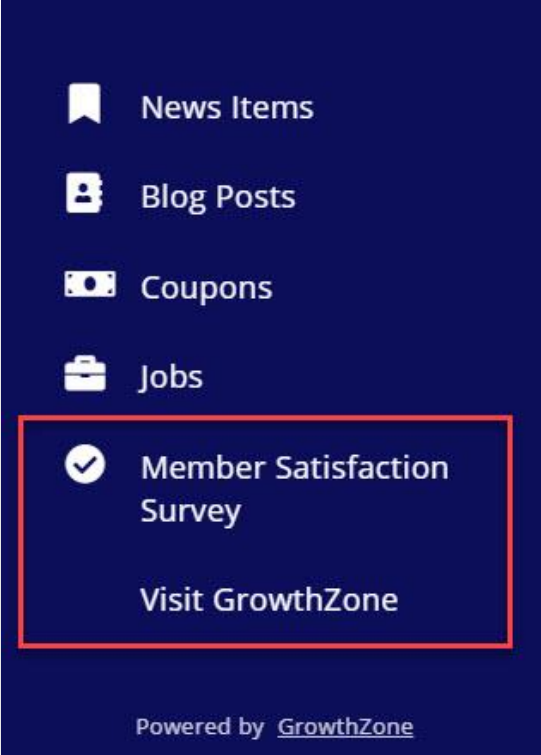
Knowledge Base: [Working with Web Content in the Info Hub](#)

**Requires subscription to the Web Content module

Info Hub - Tour

Links:

These can be links to websites, surveys-anything that exists on the internet.



A screenshot of a dark blue menu with white text and icons. The menu items are: News Items (bookmark icon), Blog Posts (person icon), Coupons (coupon icon), Jobs (briefcase icon), Member Satisfaction Survey (checkmark icon), and Visit GrowthZone. The 'Member Satisfaction Survey' and 'Visit GrowthZone' items are enclosed in a red rectangular box. At the bottom, it says 'Powered by GrowthZone'.

- News Items
- Blog Posts
- Coupons
- Jobs
- Member Satisfaction Survey
- Visit GrowthZone

Powered by [GrowthZone](#)

Info Hub - Management

My Info/My Subscriptions:

General contact info (name, address, phone, email, etc) and subscriptions can be managed in each contact record, on the Overview tab.

The screenshot shows the 'Overview' tab for a contact named Bryan Bradley. The interface is divided into several sections:

- Billing:** A summary card showing 1 scheduled billing, a balance of \$120.00, 0 billing notes, 0 payment profiles, and a tax set of None.
- Contact Info:** A section for other contact information, currently showing the email address bryan.bradley@mailinator.com.
- Businesses:** A table listing associated businesses.
- Activity:** A log of recent activities.
- Memberships:** A section for memberships, currently showing one: General Membership-Individual with a 5-month term.
- Tags, Families, Chapters, and Related Individuals:** Sections that are currently empty.

| Name | Title | Access Level | Location | Account Number |
|---------------------------|-------|----------------|----------|----------------|
| Snow Removal Services LLC | | User - Primary | | |

| Date | Type | Description |
|----------|--------------------------|--|
| 5/3/2023 | Deleted Contact in Group | Bryan Bradley was removed from New Member Email |
| 5/3/2023 | Deleted Contact in Group | Bryan Bradley was removed from GOC Test 04022020 |

Knowledge Base: [Managing Your Contacts](#)

Info Hub - Management

My Directory Listings:

Directory listings can be added/edited/deleted in the back office in the Directory Listings section of a contact record.

The screenshot shows a software interface with several sections. The 'Directory Listings' section is highlighted with a red border and contains a table with the following data:

| Name | Type | Availability | |
|-------------------------|------------------------------|-------------------|--|
| Active Member Directory | Basic Listing - Organization | Public & Info Hub | |

Other sections visible include 'Lists/Committees' (0 items), 'Communications', and 'Projects' (0 items). A sidebar on the right contains a 'Need Help?' button and a list of categories: Gold, Committees, Roles, and New Category List, each with an edit icon.

Knowledge Base: [Manage Member Directory Listings](#)

Info Hub - Management

Events:

Most member-submitted events from the Info Hub must be approved by staff in the Events Module.

The screenshot displays the 'Events' management interface. At the top right is an 'ADD NEW EVENT' button. Below it are view options: 'List View', 'Month View', 'Calendars', and 'Tasks'. A search bar is present with filters for 'Future Events' and 'Event Status: Pending Approval'. A table lists events, with one entry: 'Music In The Park - August 2023' organized by 'Jared Kincaid' on '8/19/2023'. A 'General Information' modal is open for this event, showing fields for 'Event Name*', 'Status*', and 'Publish Date'. The 'Status*' dropdown is open, showing options: 'Pending Approval', 'Approved', 'Declined', 'Draft', and 'Pending Approval'. Below these are 'Category' (Community Event), 'Payment Gateway', and 'Options' (checkboxes for Exhibitors, Sessions/Breakouts, Reminder Email, and GoToWebinar sync). 'Cancel' and 'Done' buttons are at the bottom of the modal.

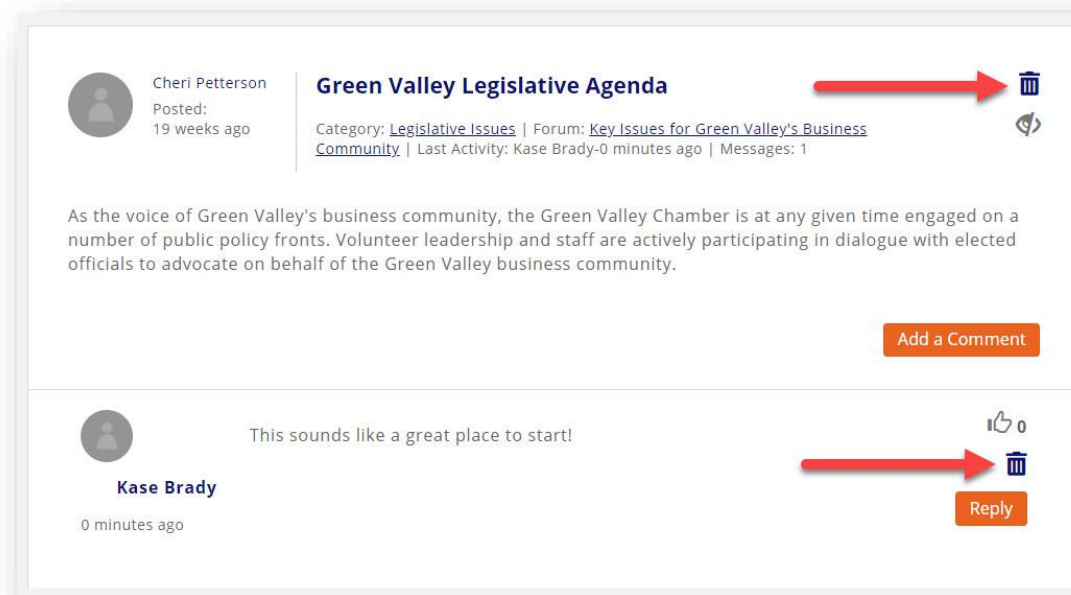
Staff can receive notifications when events are submitted for approval.

Knowledge Base:
Subscribe to Automated Staff Notifications

Info Hub - Management

Forum:

If needed, staff assigned as Moderators can delete topics and delete comments.



The screenshot shows a forum post titled "Green Valley Legislative Agenda" by Cheri Petterson, posted 19 weeks ago. The post content reads: "As the voice of Green Valley's business community, the Green Valley Chamber is at any given time engaged on a number of public policy fronts. Volunteer leadership and staff are actively participating in dialogue with elected officials to advocate on behalf of the Green Valley business community." Below the post is a comment by Kase Brady, posted 0 minutes ago, which says "This sounds like a great place to start!". A red arrow points to a trash can icon next to the post title, indicating the delete function. Another red arrow points to a trash can icon next to the comment, also indicating the delete function. There are also "Add a Comment" and "Reply" buttons visible.

Knowledge Base: [Working with the Forum](#)

Info Hub - Management

- **Continuing Education**:**

The Info Hub visibility/function of this module is wholly controlled by the access assigned for Continuing Education in each access level.

Knowledge Base: [Continuing Education](#)

***Requires subscription to the Continuing Education module*

The screenshot displays the 'Info Hub Management' interface. At the top, there are two input fields: 'Name*' with the value 'User - Standard' and 'Description' with the value 'Create/Edit in Hub; No Delete'. Below these are two main sections: 'Area' and 'Access Level'. The 'Area' is set to 'Info Hub' and the 'Access Level' is set to 'Edit'. A button labeled 'Info Hub Sub Areas' is visible. Below this, there is a table of sub-areas with their respective access levels:

| Sub-Area | Access Level |
|-------------------------|-------------------|
| Directories | -- Use Default -- |
| Events | Create |
| Membership | -- Use Default -- |
| Individual Billing Info | -- Use Default -- |
| Continuing Education | -- Use Default -- |
| Web Content | -- Use Default -- |

The 'Continuing Education' row is highlighted with a red box, and its dropdown menu is open, showing the following options: -- Use Default --, Delete, Create, Edit, View (highlighted in blue), and None.

Info Hub - Management

Directory:

Directory listings are controlled by the Directory Display levels assigned to each member/membership type.

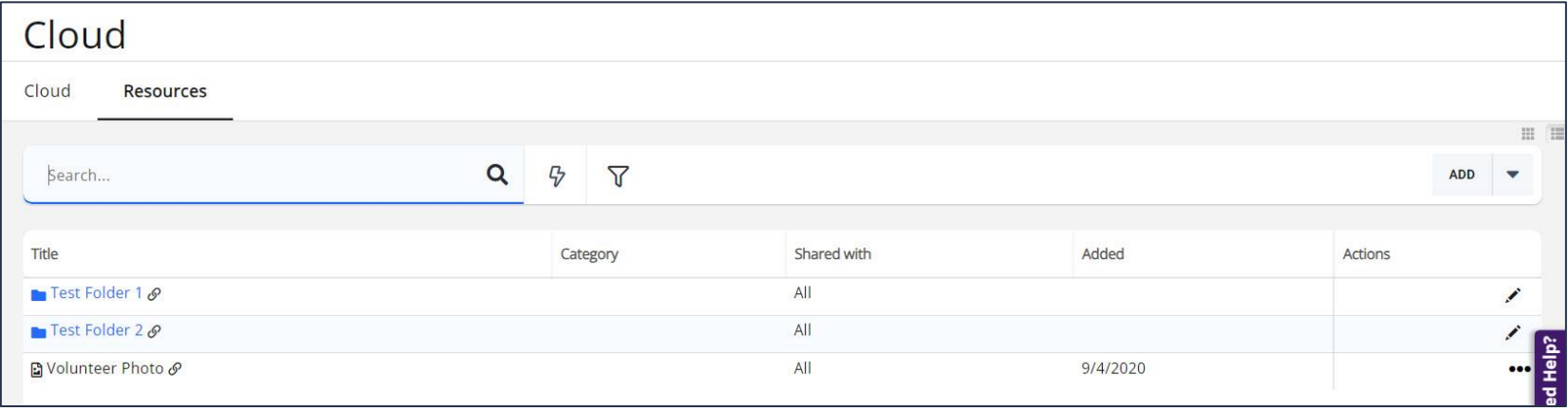
Knowledge Base:
[Set Up Directory Display Settings](#)

The image shows two overlapping software windows. The background window is titled "Edit Directory Display Settings" and contains several sections: "Name*" with a text input field containing "Standard Listing- Individual" (highlighted with a red box); "Description*" with a text input field containing "Individual listings in the Active Member Directory"; "Rank/Priority Placement" with a numeric input field containing "0"; "Show Individual Details" with checkboxes for "Prefix", "First Name", "Middle Initial", "Last Name", "Common Name", "Suffix", "Title", and "Primary Organization"; "Show Contact Details" with checkboxes for "Address", "City", "State/Province", "Postal Code", "Country", "Phone", "Email", and "Website"; and "Show Custom Fields" with checkboxes for "Demographic Status" and "Certified Since". The foreground window is titled "Edit Membership Benefits - General" and contains: "Directory Listing" with a "Directory*" dropdown set to "Active Member Directory" and a "Directory Display*" dropdown set to "Standard Listing- Individual" (both highlighted with red boxes); "Directory Categories" with a checked "Display Directory Categories" checkbox; and "Category List*" with a dropdown set to "Business Category", "Minimum Required" set to "1", and "Maximum Allowed" set to "3". Both windows have "Cancel" and "Done" buttons at the bottom.

Info Hub - Management

Resources:

In the back office, staff can add/edit/delete/create links to Resources via the Cloud module.



Knowledge Base: [View/Add Info Hub Resources via the Cloud](#)

Info Hub - Management

Resources:

GrowthZone can track resources accessed in the Info Hub to see which are the most popular, which contacts or organizations are using them, and which resources are being accessed and when. **

| Contact Name | Primary Business | Resource | Date & Time Accessed | Category |
|-----------------|------------------|--|----------------------|---|
| Adam Harrison | Premise Inc. | BYOD & MOBILE POLICY (20-781) | 7/21/2023 2:21:59 PM | DOCUMENT: IT Template, INTEREST 13: Mobile Technology / Communications / Telephony |
| Adam Harrison | Premise Inc. | POLICIES AND PROCEDURES TOOLKIT (TK009) | 7/21/2023 2:19:20 PM | DOCUMENT: Toolkit, INTEREST 02: Business Continuity / Disaster Recovery, INTEREST 04: CIO / Strategic / IT Finance, INTEREST 05: Cloud, INTEREST 10: Infrastructure / Network / Asset Management, INTEREST 11: IT Service Management / Project Management, INTEREST 12: Mobile Technology / Communications / Telephony, INTEREST 15: Security, INTEREST 16: Service Desk / Help Desk, INTEREST 17: Staffing / HR / Remote Workforce |
| Adam Harrison | Premise Inc. | MOBILE DEVICE MANAGEMENT POLICY (20-378) | 7/21/2023 2:25:46 PM | DOCUMENT: IT Template, INTEREST 13: Mobile Technology / Communications / Telephony, INTEREST 15: Security |
| Adrienne Kemper | Metis | MOBILE DEVICE MANAGEMENT (MV2462) | 7/10/2023 1:10:15 PM | DOCUMENT: Transcript, INTEREST 10: Infrastructure / Network / Asset Management, INTEREST 13: Mobile Technology / Communications / Telephony, INTEREST 15: Security, INTEREST 17: Staffing / HR / Remote Workforce |
| Adrienne Kemper | Metis | AI ACCEPTABLE USE POLICY (20-1268) | 7/6/2023 9:08:48 PM | DOCUMENT: IT Template, INTEREST 03: Business Intelligence / Data Management, INTEREST 06: DevOps / Application Development / AI, INTEREST 15: Security |
| Allan Spitzer | Westat | AI ACCEPTABLE USE POLICY (20-1268) | 7/14/2023 1:19:58 PM | DOCUMENT: IT Template, INTEREST 03: Business Intelligence / Data Management, INTEREST 06: DevOps / Application Development / AI, INTEREST 15: Security |

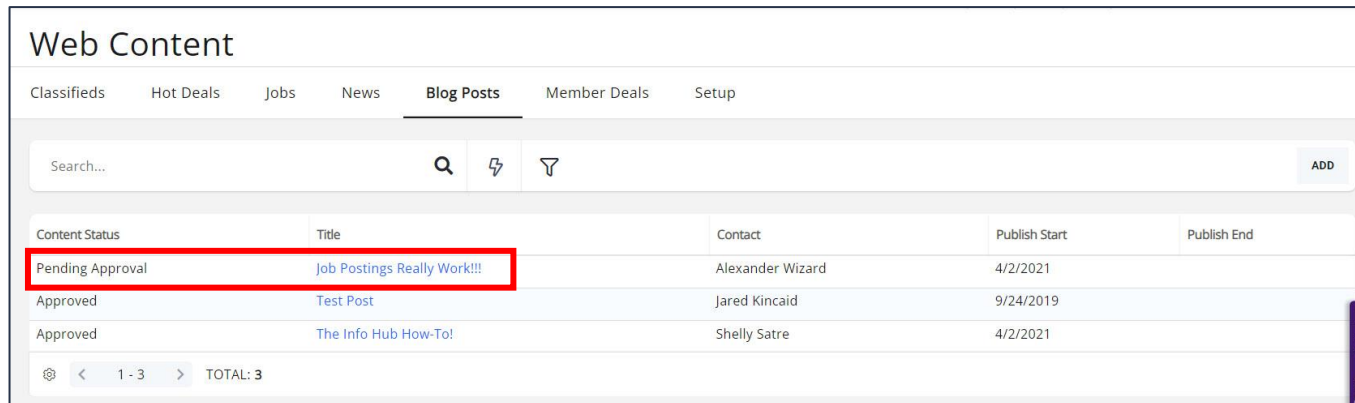
Knowledge Base: Info Hub Resource Tracking

**The Metrics Module must be enabled in order to provide resource tracking. [Contact the Engagement Team](#) if further information is needed.

Info Hub – Management

Web Content**:

Most content submitted by your members will need to be approved by staff in the back office.



The screenshot shows the 'Web Content' management interface. At the top, there are navigation tabs: 'Classifieds', 'Hot Deals', 'Jobs', 'News', 'Blog Posts' (which is selected), 'Member Deals', and 'Setup'. Below the tabs is a search bar with a search icon, a refresh icon, a filter icon, and an 'ADD' button. The main content area is a table with the following columns: 'Content Status', 'Title', 'Contact', 'Publish Start', and 'Publish End'. The table contains three rows of data. The first row is highlighted with a red border and contains the following information: 'Pending Approval', 'Job Postings Really Work!!!', 'Alexander Wizard', '4/2/2021', and an empty 'Publish End' cell. The second row contains: 'Approved', 'Test Post', 'Jared Kincaid', '9/24/2019', and an empty 'Publish End' cell. The third row contains: 'Approved', 'The Info Hub How-To!', 'Shelly Satre', '4/2/2021', and an empty 'Publish End' cell. At the bottom of the table, there is a pagination control showing '1 - 3' and 'TOTAL: 3'. A vertical 'Need Help?' button is located on the right side of the table.

| Content Status | Title | Contact | Publish Start | Publish End |
|------------------|-----------------------------|------------------|---------------|-------------|
| Pending Approval | Job Postings Really Work!!! | Alexander Wizard | 4/2/2021 | |
| Approved | Test Post | Jared Kincaid | 9/24/2019 | |
| Approved | The Info Hub How-To! | Shelly Satre | 4/2/2021 | |

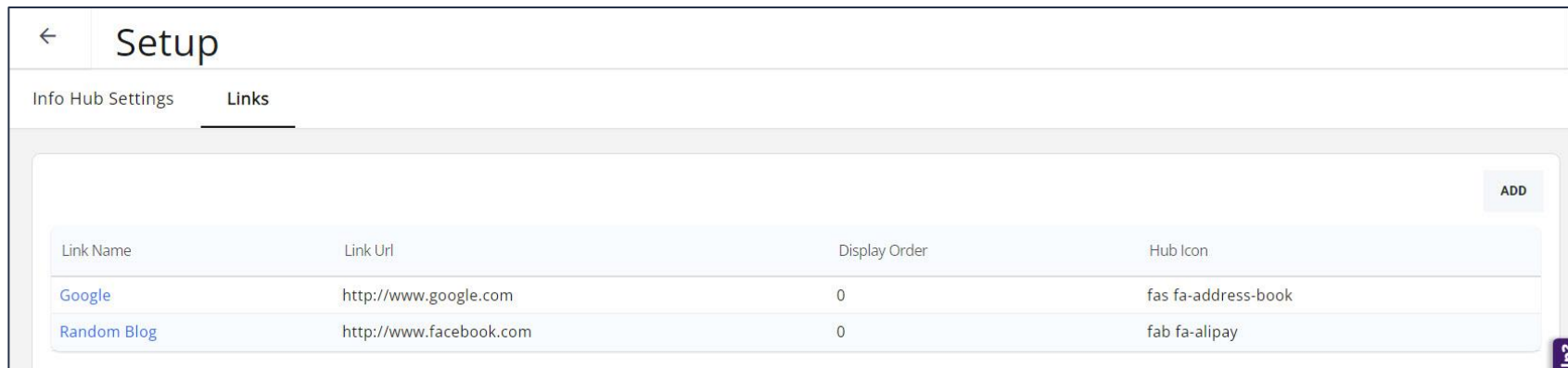
Knowledge Base: [Approve Web Content Submissions](#)

**Requires subscription to the Web Content module

Info Hub - Management

Links:

You can add as many links to your Info Hub navigation as you like- if it's on the internet, you can add a link to it here.



| Link Name | Link Url | Display Order | Hub Icon |
|-------------|-------------------------|---------------|---------------------|
| Google | http://www.google.com | 0 | fas fa-address-book |
| Random Blog | http://www.facebook.com | 0 | fab fa-alipay |

Knowledge Base: [Add Links to Info Hub Navigation](#)

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »