

# Working with Directories

# Overview

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- Understanding the Components:
  - Categories
  - Directory Display Settings
  - Directories

# Overview

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With your GrowthZone software you have the opportunity to display multiple directories on your public website, and within the Info Hub

- ✓ By displaying your Membership directories publicly you help thousands of consumers find business partners, contacts, and other like-minded people
- ✓ At a minimum, the directory provides each member's contact information and industry





# Overview

## Anatomy of a Directory

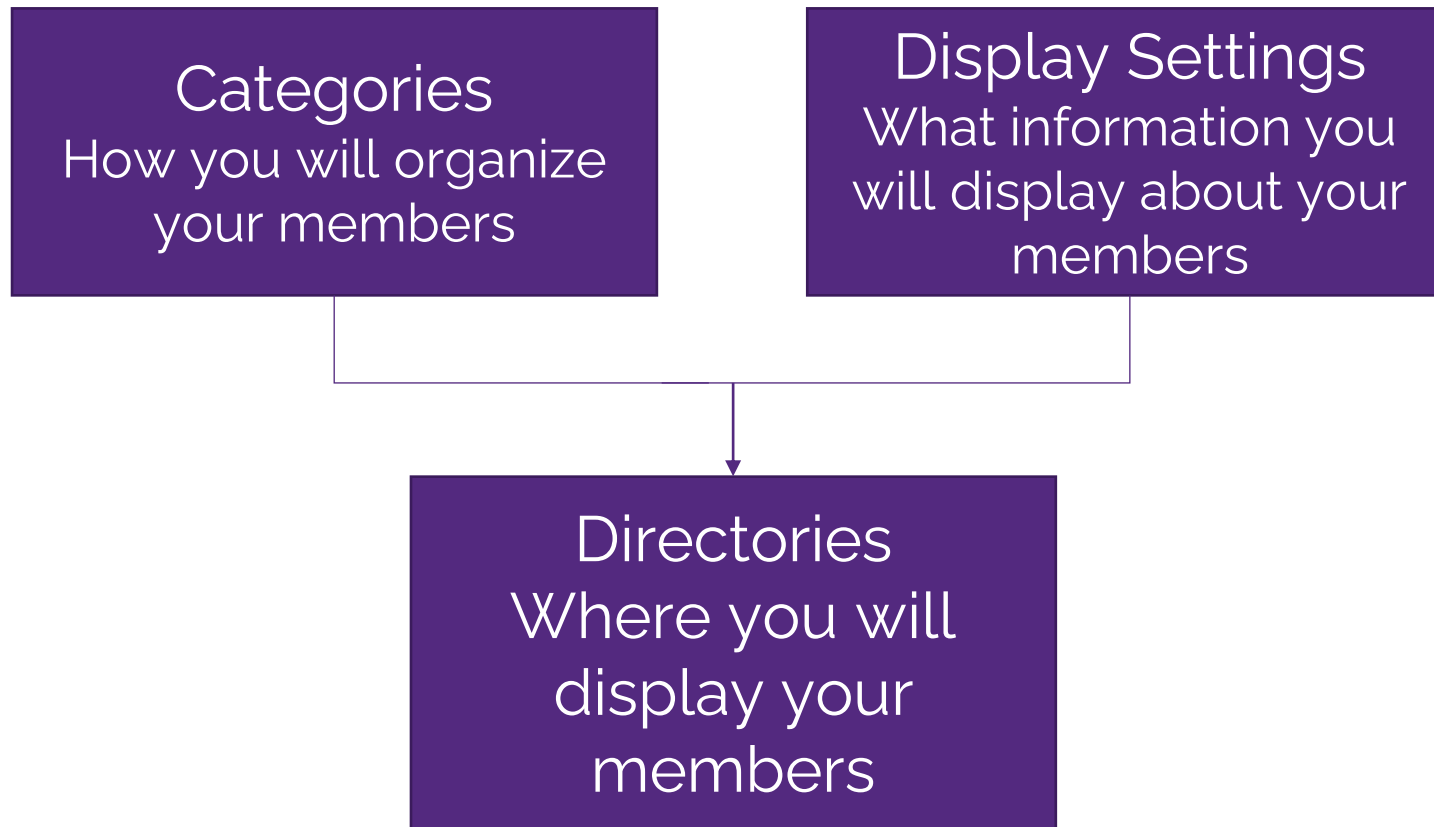
### Member Directory

What are you looking for? State/Province Postal Code Business Category [Q Search](#)

[0-9](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

 <p>Computer &amp; Telecomm</p>	Finance & Insurance	 <p>Home &amp; Garden <a href="#">Florists</a></p>
 <p>Pets &amp; Veterinary <a href="#">Dog Boarding</a></p>	Real Estate, Moving & Storage	 <p>Restaurant Food &amp; Beverage <a href="#">Bakery, Candy Stores, Catering</a></p>

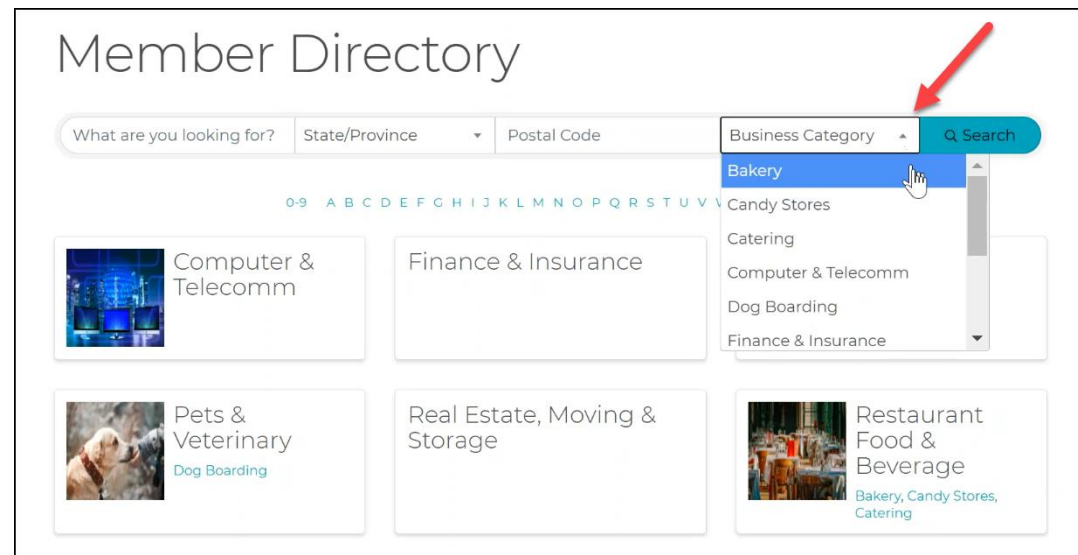
# Components of a Directory



# Categories

When designing your categories, for your directories, determine whether your categories are to be associated to businesses or to an individual or both

- KB: [Setting up Categories](#)



# Categories

Type Matters...

- **Contact** – available to assign to both individuals and businesses
- **Business Contact** – only available to assign to businesses
- **Individual Contact** – only available to assign to individuals

Add Category List 🖨️ ✕

Category Type	Name *	Description
Business contact ▼	<input type="text"/>	<input type="text"/>

Other Options

Is Active?

Available to Public?

Available to Members (Info Hub)

Advanced Options

# Categories

## Understanding the Advanced Options...

- Allow Members To Edit (Info Hub)
- Is Required
- Minimum Quantity/Maximum Quantity

Allow Members To Edit (Info Hub)  
 Is Required  
Minimum Quantity ⓘ  Maximum Quantity ⓘ   
Advanced Options



# Categories

- Starter List of Categories (Business)

- Accounting & Tax Services
- Arts, Culture & Entertainment
- Auto Sales & Service
- Banking & Finance
- Business Services
- Community Organizations
- Dentists & Orthodontists
- Education
- Health & Wellness
- Health Care
- Home Improvement
- Insurance

- Internet & Web Services
- Legal Services
- Lodging & Travel
- Marketing & Advertising
- News & Media
- Pet Services
- Real Estate
- Restaurants & Nightlife
- Shopping & Retail
- Sports & Recreation
- Transportation
- Utilities

# Directory Display Settings

Directory Display Settings provide you the opportunity to choose the information that will be displayed for your contacts in directories

KB: [Directory Display Settings](#)

Add Directory Display Settings 🖨 ✕

Name\*

Description\*

Rank/Priority Placement  ⓘ

Show Individual Details

Prefix  First Name  Middle Initial  Last Name

Common Name  Suffix  Title  Primary Organization

# Getting Started – Directory Display Setting

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## Considerations...

- Do you wish to offer different listing levels?
- Do you want to set the display priority for members?
- What contact information do you want to display for your members?
- Do you wish to display member custom fields?
- For businesses, do you wish to display the business staff members on the listing?
- Which Options do you wish to include in the listing? Photos, logos, videos, etc.

# Directory Display Settings

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## Priority Ranking...

A benefit that can be included in a directory listing is where the members is displayed in the directory. Setting the priority ranking on a listing will place members either higher or lower in a category. The lower the number the higher the priority placement of a member

# Directory Display Settings

## What contact information do you want to display for your members?

IMPORTANT: When choosing addresses, phone, email, website you must indicate the "type" AND when you enter this contact information for a contact, indicate the appropriate type

The screenshot shows the profile for 'A Place for Dogs' (ID: 1234564). The 'Contact Info' section is expanded, showing the following information:

Type	Value	Actions
Work	info@mailiantor.com	✉ ✎ ✕
Main	(218) 786-0987	✉ ✎ ✕
Physical	1384 Crooked Lake Rd Deerwood MN 56444 United States	✉ ✎ ✕
Social site	https://www.facebook.com/dogs/	✉ ✎ ✕

The 'Memberships' section shows 5 memberships:

- Membership
- Small Business (Ended 4 months ago)
- Corporate Membership 5\_13 (Ended 1 year, 6 months ago)
- General Membership

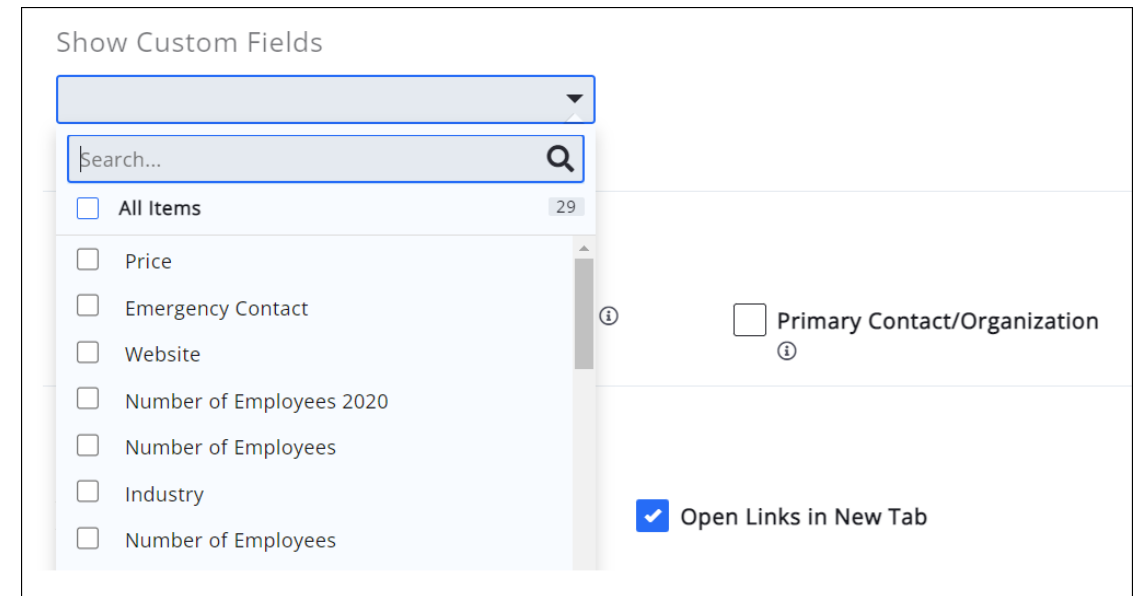
A red arrow points to the 'Main' contact type in the 'Contact Info' section.

# Directory Display Setting

Do you wish to include custom fields in a member's listing?

Custom fields must be designated as Public to be displayed in the list of available fields

KB: [Custom Fields](#)



The screenshot shows a settings panel titled "Show Custom Fields". At the top is a dropdown menu. Below it is a search bar with the placeholder text "Search..." and a magnifying glass icon. A list of checkboxes follows, with "All Items" selected and a count of "29" next to it. The list includes: Price, Emergency Contact, Website, Number of Employees 2020, Number of Employees, Industry, and Number of Employees. To the right of the list, there is a checkbox for "Primary Contact/Organization" with an information icon. At the bottom right, there is a checked checkbox for "Open Links in New Tab".

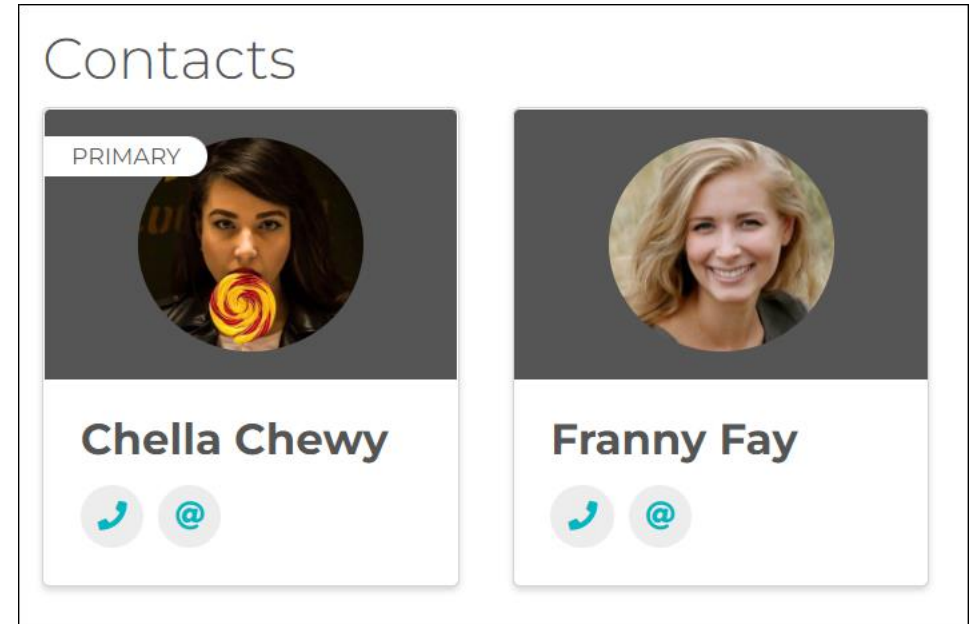
# Directory Display Setting

## Do you wish to display the staff of an organization?

Show Related Contacts

Show Contacts With Memberships

Show Primary Contact/Organization



# Directory Display Setting

**Additional Options...** if you wish this is where you can really differentiate between directory listings

Display Additional Contacts

Related ⓘ       With Memberships ⓘ       Primary Contact/Organization ⓘ

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Options

Use Contacts Website for Listing page ⓘ       Open Links in New Tab

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Show:

Public Web Content       Membership Type       Search Logo ⓘ       Search Description ⓘ

Gallery       Video ⓘ       Highlights       Bio/Description



# Directories

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You have the ability to display multiple directories on your web-site!

For Example:

If you are a Realtor Association you may wish to have a directory for your Realtors and a second directory highlighting your Affiliates

If you are a chamber of commerce, your possibilities are endless, you may have a directory for just restaurants, and another for places to stay, or even your trade show exhibitors

# Directories

- KB: [Create a New Directory](#)

Name	Description	Default Type	Availability	Actions
<a href="#">Active Member Directory</a>		Deluxe Listing	Public & Info Hub	✕
<a href="#">ND Vet Association</a>		Standard Listing	Public	✕
<a href="#">REALTORS</a>		Super Deluxe - Org	Public	✕
<a href="#">Restaurants</a>		Standard Listing	Public	✕
<a href="#">Spring Trade Show Exhibitor Directory</a>		Deluxe Listing	Public	✕

Search...

1 - 5 TOTAL: 5

Need Help?

# Assign Directory to Members

Directories can be assigned automatically to your members by tying directories to memberships

KB: [Setup Membership Type Directories & Categories](#)

Membership Types								ADD
Search...								
Name	Active/Courtesy	Pricing	Levels	Benefit	Chapters Fee Items	Directories/Categories	Actions	
General Membership	14	\$1,250.00 once , \$1,250.00/term	2	5	0	1 Directory / 1 Category		
Individual Affiliate Membership	24	\$100.00/term	<No Levels>	1	0	1 Directory / 1 Category		
Corporate Membership	8	Based On Formula	<No Levels>	2	0	1 Directory / 1 Category		
Small Business	3	Based On Formula	<No Levels>	1	0	1 Directory / 1 Category		
Small-Business-2	0	See Levels	2	<No-Benefit>	0	<No-Directories/Categories>		

# Update Directory Information

- From the back office you have the ability to add/update directory information for your members
- KB: [Update a Member's Directory Listing Information](#)

The screenshot displays a member profile for "A Place for Dogs" (ID: 1234564). The profile is active and includes a navigation menu with "Active", "1 / 794", and "EDIT ORGANIZATION".

**Activity Log:**

Date	Category	Description
4/11/2023	Contact	Address Changed
4/5/2023	Purchase	Membership Dues 2023
4/5/2023	Reactivated Membership	General Membership was reactivated
2/27/2023	Contact Categories	English, French, German were added
2/10/2023	Purchase	Apparel

**Communications:**

Date	Subject	From display name	Category
2/28/2023 3:54 PM	Your Membership Invoice (Reminder)	Brenda Kerry	

**Organization:**

- Lolas House (Branch Location)
- The Treehouse (Crosby Parent)

**Directory Listings (1):**

- Active Member Directory (Deluxe Listing Public & Info Hub)

A red arrow points to the "Directory Listings" section. A "Need Help?" button is visible on the right side of the interface.

# Update Directory Information

Alternately, and probably preferred, members can update their own information via the Info Hub. Minimum Create access required.

KB: [Update Directory Listing in Info Hub](#)



The screenshot shows a user interface for managing a directory listing. At the top, it says "My Directory Listing" with a "View Listing in" dropdown. Below this is a profile section for "A Place for Dogs" with a dog icon. A tip box states: "Tip: To view/update business information not pulled into your directory listing or related contact information, you can view/update your Related Organization Info, Related Contact Info, or Related Branch Info (if applicable)." The interface is divided into several sections: "CONTACT INFO" with fields for "Mailing" (24400 Smiley Road Nisswa MN 56468) and "Main" ((218) 786-0987), each with a green checkmark; "ADDITIONAL INFO" with a dropdown arrow; "MEMBER DIRECTORY INFO" with a green checkmark and a "Price:" field; "DIRECTOR INFO" with a pencil icon; "SEARCH DESCRIPTION" (A caring, supportive environment for your pets in need, 24 hours a day. NO boarding at this time); "DESCRIPTION" (A caring, supportive environment for your pets in need, 24 hours a day.); and "KEYWORDS". On the right, there is an "IMAGES" section with "Add", "Edit", "Reorder", and "Remove" icons, and a carousel image of a dog sitting on a couch.

# Create URL for Directory

Your Directories can be easily published to your public site by generating a URL for the page

KB: [Publish GrowthZone Content on Your Web Site](#)

Manage Site Modules

< 1 of 2 >  

**+ ADD MODULE**

Site Module Type	Title	Version	Relative Path	Template
Directory	<a href="#">Active Member Directory</a>	Version 2	activememberdirectory	Default
EventCalendar	<a href="#">EventCalendar</a>	Version 2	eventcalendar	Default
Directory	<a href="#">MN Veterinary Association Member Directory</a>	Version 2	mnveterinaryassociationmemberdirectory	My template

