

Working with Directories

Overview

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

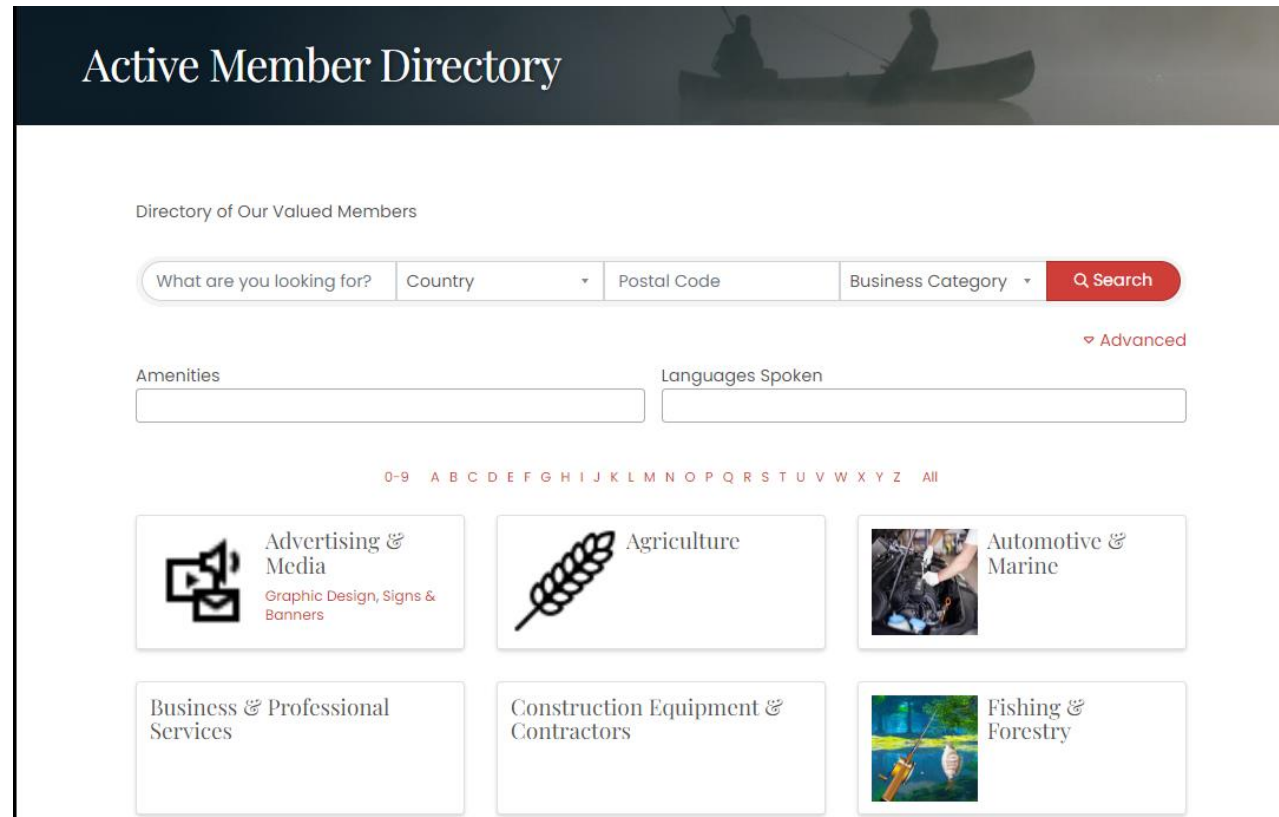
Overview

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

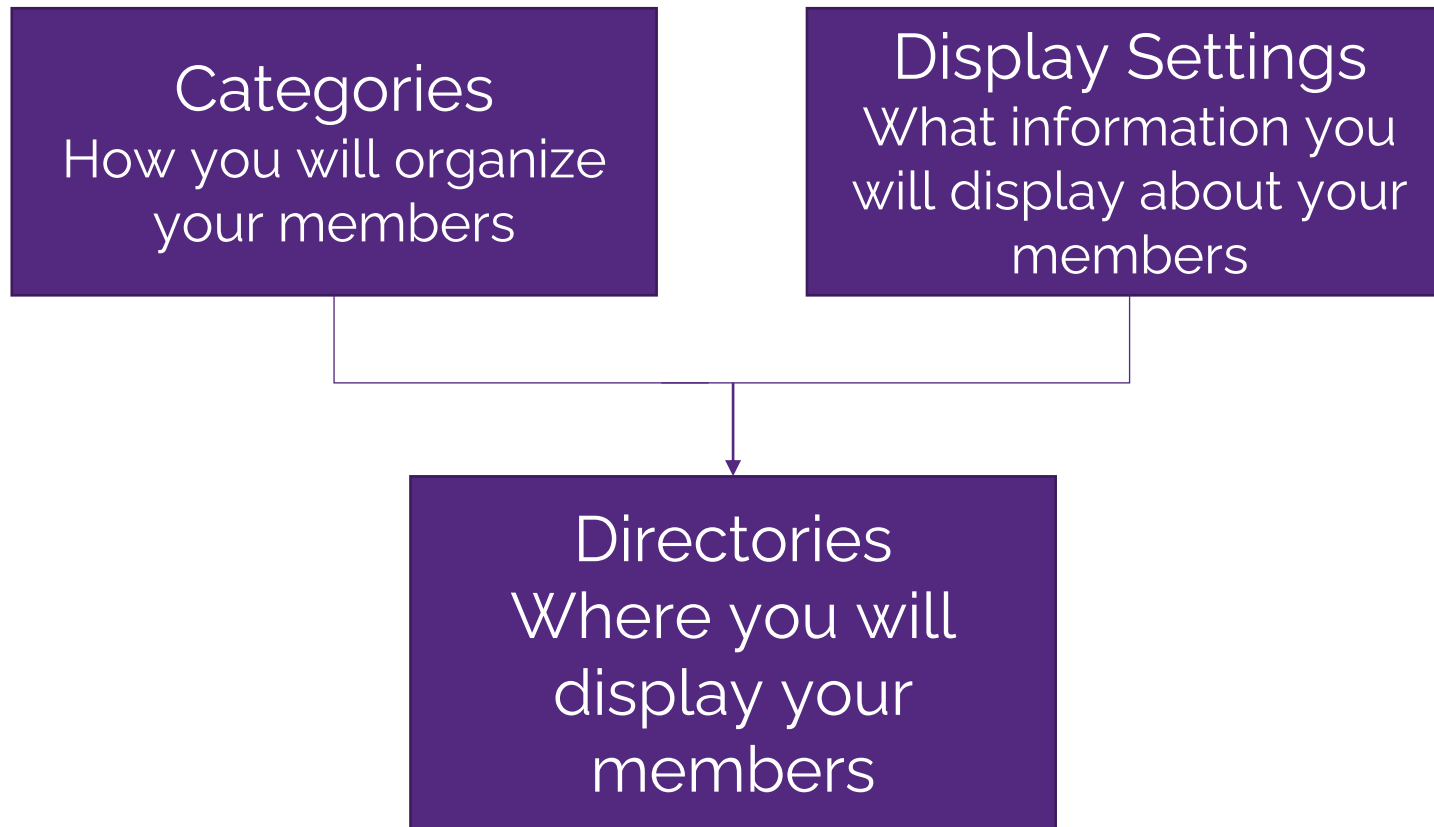
Overview

Anatomy of a Directory



The screenshot displays a web interface for an "Active Member Directory". At the top, a dark header features the title "Active Member Directory" and a background image of two people in a canoe. Below the header, the text "Directory of Our Valued Members" is centered. A search bar contains the placeholder "What are you looking for?" and includes dropdown menus for "Country", "Postal Code", and "Business Category", followed by a red "Search" button. A link for "Advanced" search is positioned to the right. Below the search bar are two input fields labeled "Amenities" and "Languages Spoken". A horizontal navigation bar lists letters from "0-9" to "All". The main content area is a grid of six category tiles: "Advertising & Media" (with subtext "Graphic Design, Signs & Banners"), "Agriculture", "Automotive & Marine", "Business & Professional Services", "Construction Equipment & Contractors", and "Fishing & Forestry". Each tile includes a representative icon.

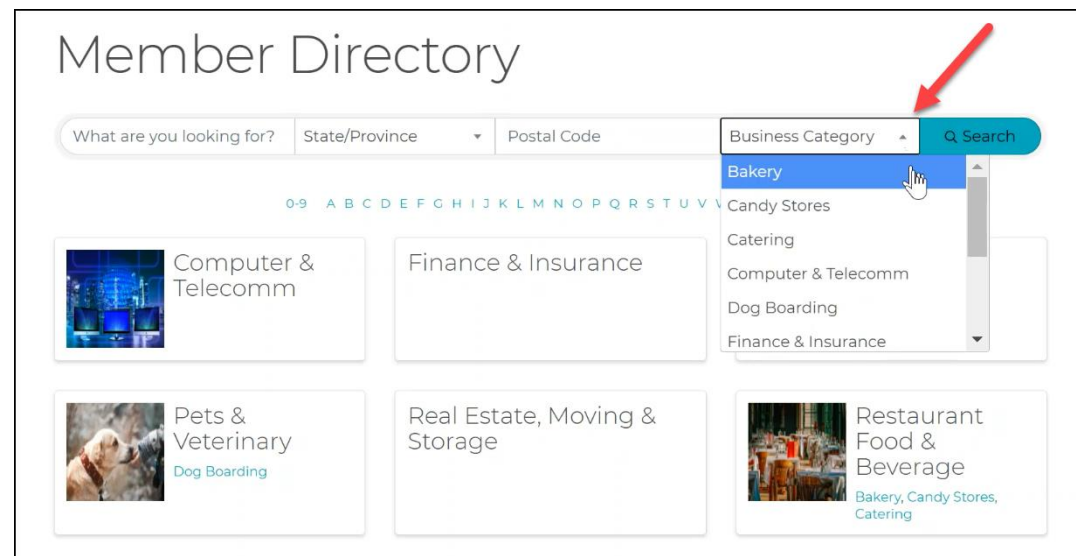
Components of a Directory



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

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

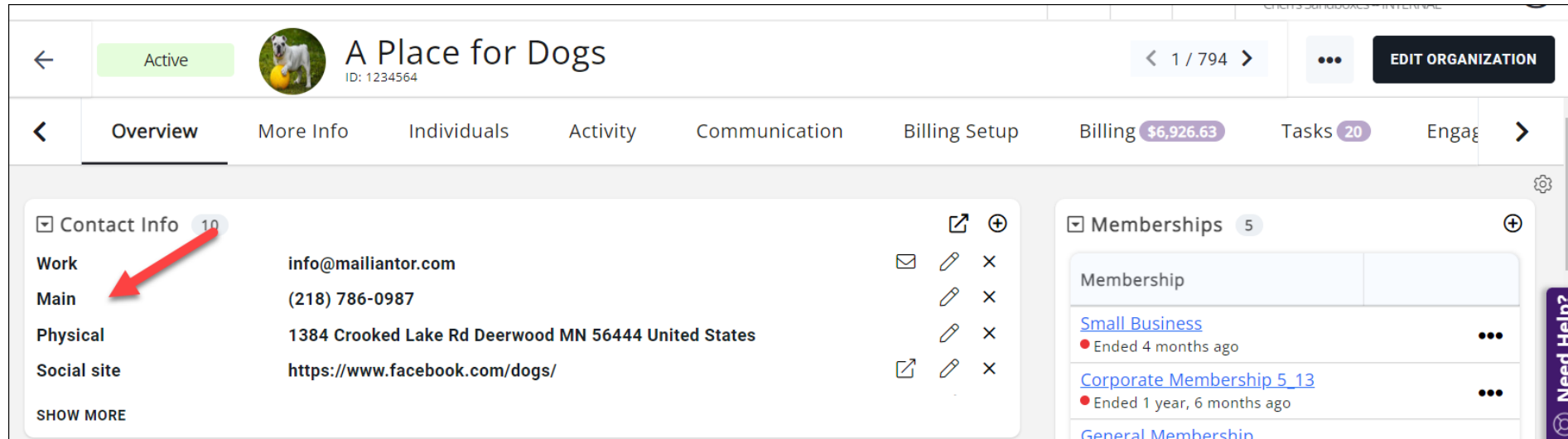
Priority Ranking...

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 displays the organization profile for "A Place for Dogs" (ID: 1234564). The interface includes a navigation bar with tabs for Overview, More Info, Individuals, Activity, Communication, Billing Setup, Billing (\$6,926.63), Tasks (20), and Engage. The "Contact Info" section is expanded, showing 10 items. A red arrow points to the "Main" contact type. The "Memberships" section is also expanded, showing 5 items.

Contact Type	Contact Information	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/	✉ ✎ ✕

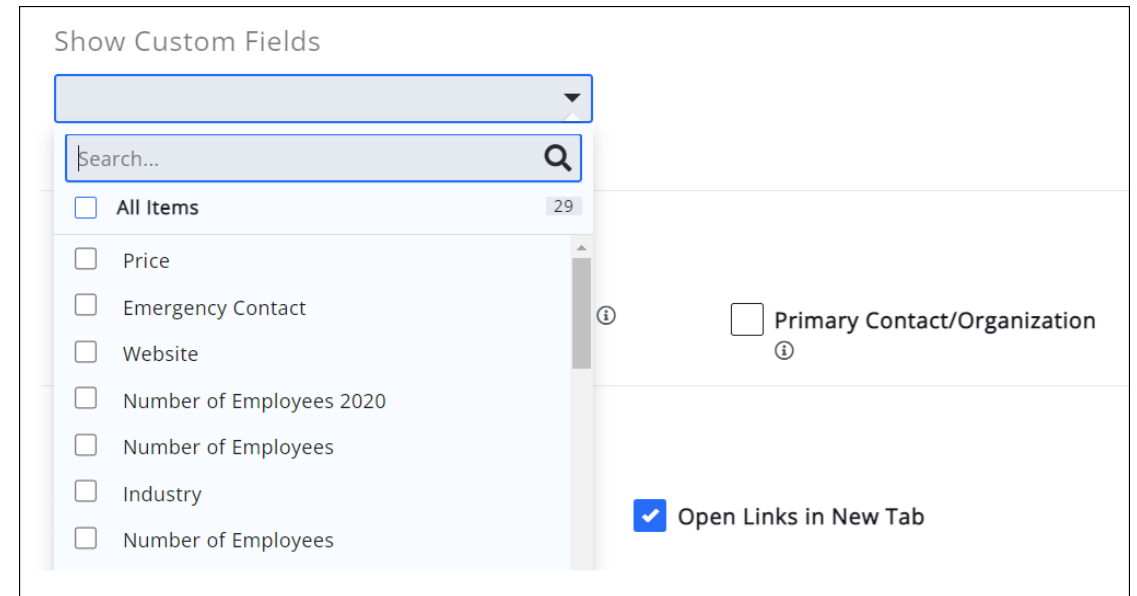
Membership Type	Status	Actions
Small Business	Ended 4 months ago	⋮
Corporate Membership 5_13	Ended 1 year, 6 months ago	⋮
General Membership		

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](#)



Show Custom Fields

Search...

All Items 29

- Price
- Emergency Contact
- Website
- Number of Employees 2020
- Number of Employees
- Industry
- Number of Employees

Primary Contact/Organization

Open Links in New Tab

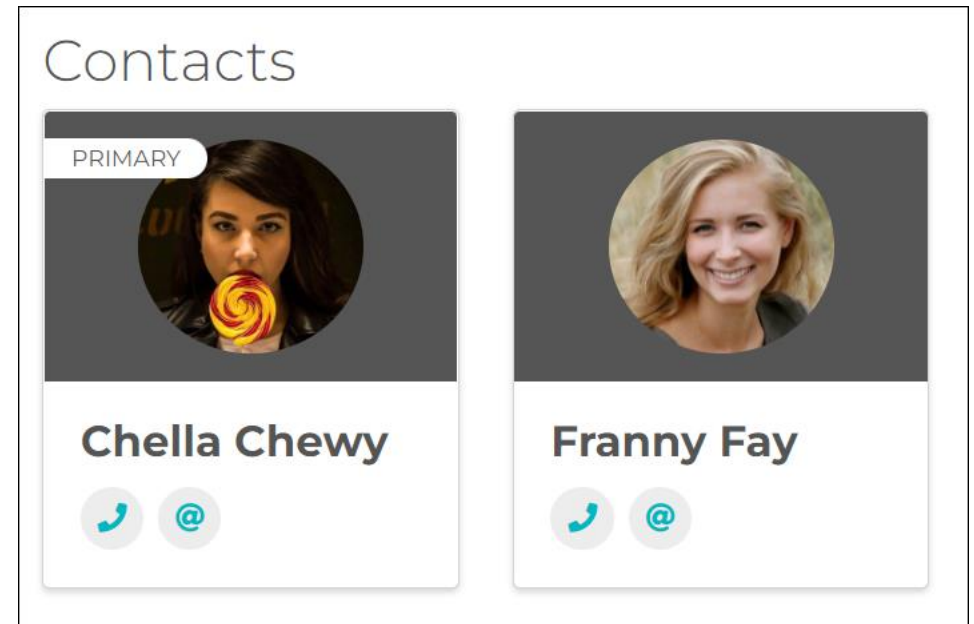
Directory Display Setting

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 ⓘ

Options

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

Show:

Public Web Content Membership Type Search Logo ⓘ Search Description ⓘ

Gallery Video ⓘ Highlights Bio/Description

Directories

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
Active Member Directory		Deluxe Listing	Public & Info Hub	✕
ND Vet Association		Standard Listing	Public	✕
REALTORS		Super Deluxe - Org	Public	✕
Restaurants		Standard Listing	Public	✕
Spring Trade Show Exhibitor Directory		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>		

Need Help?

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 shows a user interface for managing a member's profile. At the top, there is a navigation bar with a back arrow, a status indicator 'Active', a profile picture of a dog, the name 'A Place for Dogs', and an ID '1234564'. To the right of the navigation bar are pagination controls '< 1 / 794 >', a menu icon, and an 'EDIT ORGANIZATION' button.

Below the navigation bar is a table of activity logs:

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

Below the activity logs is a 'Communications' section with a table:

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

On the right side of the interface, there is a sidebar with the following sections:

- Organization**: A list of organizations with edit and delete icons. The first entry is 'Lolas House' with 'Branch Location' below it. The second entry is 'The Treehouse' with 'Crosby Parent' below it.
- Directory Listings**: A section with a checkmark icon, the text 'Directory Listings 1', and a plus icon. It contains a table with one row: 'Active Member Directory' with 'Deluxe Listing Public & Info Hub' below it.

A red arrow points from the 'Directory Listings' section to the 'Organization' section. A vertical 'Need Help?' button is located on the far right of the sidebar.

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 editing a directory listing. The title is "My Directory Listing" with a "View Listing in" dropdown. The listing is for "A Place for Dogs". 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**: Includes "Mailing" (24400 Smiley Road Nisswa MN 56468) and "Main" ((218) 786-0987), both with green checkmarks.
- ADDITIONAL INFO**: Includes "MEMBER DIRECTORY INFO" with a green checkmark and a "Price:" field.
- DIRECTORY INFO**: Includes "SEARCH DESCRIPTION" (A caring, supportive environment for your pets in need, 24 hours a day. NO boarding at this time) and "DESCRIPTION" (A caring, supportive environment for your pets in need, 24 hours a day.).
- IMAGES**: Shows a photo of a dog on a couch with "Add", "Edit", "Reorder", and "Remove" icons.

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	Active Member Directory	Version 2	activememberdirectory	Default
EventCalendar	EventCalendar	Version 2	eventcalendar	Default
Directory	MN Veterinary Association Member Directory	Version 2	mnveterinaryassociationmemberdirectory	My template

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](#) »

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

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