

# Managing your 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

## 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



Computer &  
Telecomm

Finance & Insurance



Home &  
Garden

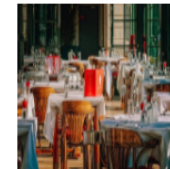
Florists



Pets &  
Veterinary

Dog Boarding

Real Estate, Moving &  
Storage



Restaurant  
Food &  
Beverage

Bakery, Candy Stores,  
Catering

# Overview

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Understanding the components:

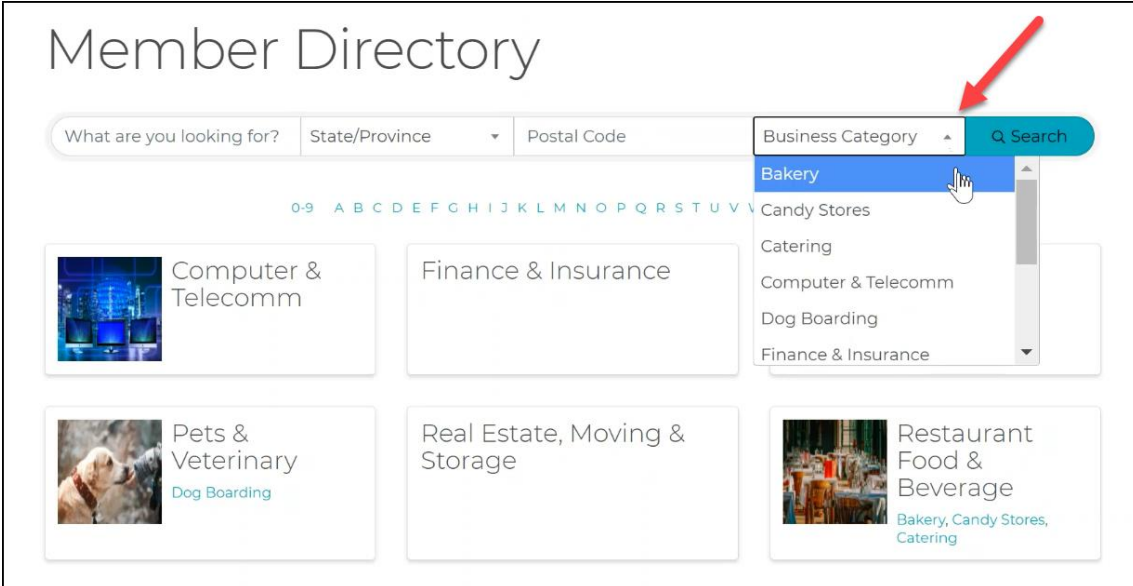
- Categories
- Directory Display Settings
- Directories

# Categories

## Setting up your 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](#)



The screenshot displays a search interface for a "Member Directory". At the top, there are search filters: "What are you looking for?", "State/Province", and "Postal Code". To the right is a "Business Category" dropdown menu, which is currently open, showing a list of categories: Bakery, Candy Stores, Catering, Computer & Telecomm, Dog Boarding, and Finance & Insurance. A red arrow points to the "Business Category" dropdown, and a hand cursor is positioned over the "Bakery" option. Below the search filters is a "Q Search" button. The main content area features a grid of category tiles. The tiles include: "Computer & Telecomm" (with a blue abstract image), "Finance & Insurance" (with a white background), "Pets & Veterinary" (with a dog image and "Dog Boarding" link), "Real Estate, Moving & Storage" (with a white background), and "Restaurant Food & Beverage" (with a restaurant image and links for "Bakery, Candy Stores, Catering").

# Categories

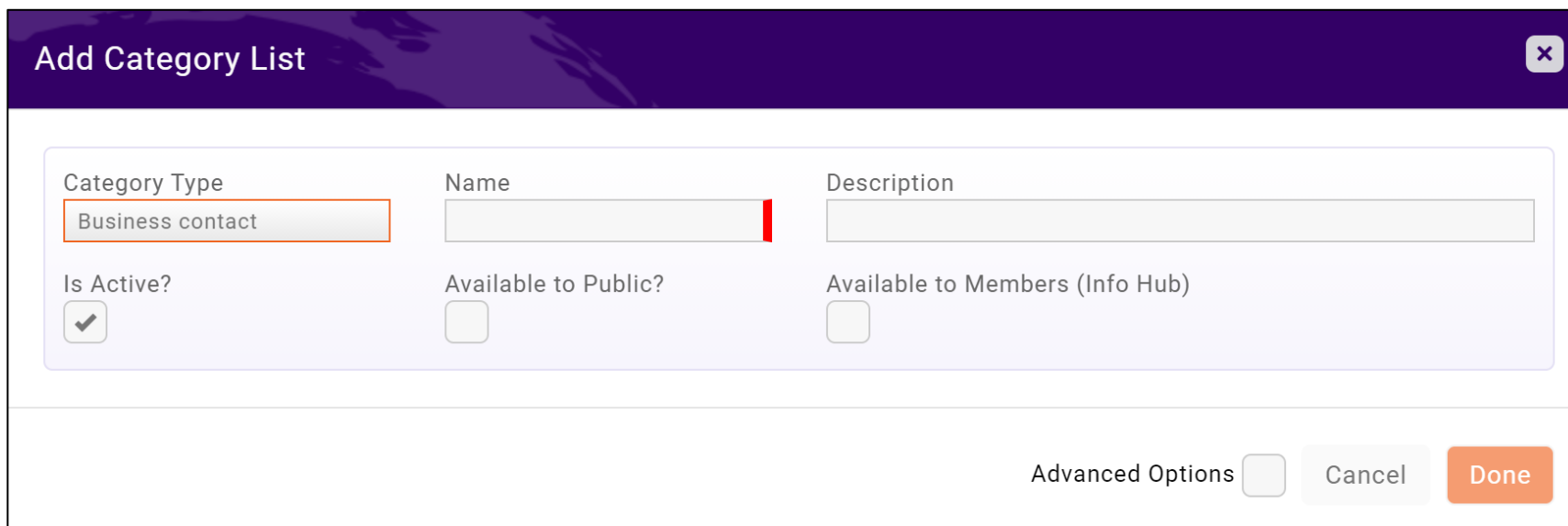
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## Type Matters...

**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



The screenshot shows a modal window titled "Add Category List" with a close button (X) in the top right corner. The form contains the following fields and options:

| Category Type                                     | Name   | Description   |
|---|--|---|
| <input type="text" value="Business contact"/>     | <input type="text"/>                             | <input type="text"/>  |
| Is Active?<br><input checked="" type="checkbox"/> | Available to Public?<br><input type="checkbox"/> | Available to Members (Info Hub)<br><input type="checkbox"/> |

At the bottom right of the form, there are three controls: "Advanced Options" with an unchecked checkbox, a "Cancel" button, and a "Done" button.

# Categories

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## Understanding the Advanced Options...

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

**Add Category List** [B] [X]

|  |  |   |
|--|--|---|
| Category Type<br>Business contact ▾                          | Name<br>[ ]                                      | Description<br>[ ]  |
| Is Active?<br><input checked="" type="checkbox"/>            | Available to Public?<br><input type="checkbox"/> | Available to Members (Info Hub)<br><input type="checkbox"/> |
| Allow Members To Edit (Info Hub)<br><input type="checkbox"/> | Is Required<br><input type="checkbox"/>          | Minimum Quantity<br>0 [ ]                                   |
|  |  | Maximum Quantity<br>0 [ ]                                   |

Advanced Options  [Cancel] [Done]

# Categories

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## 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 with the opportunity to choose the data that will be displayed for your contacts in directories

KB: [Directory Display Settings](#)

Edit Directory Display Settings < 1 of 3 > ✕

Name  
Standard Listing

Description  
Standard Directory Listing

Rank/Priority Placement ⓘ  
10

Advanced Options  Cancel Done

# 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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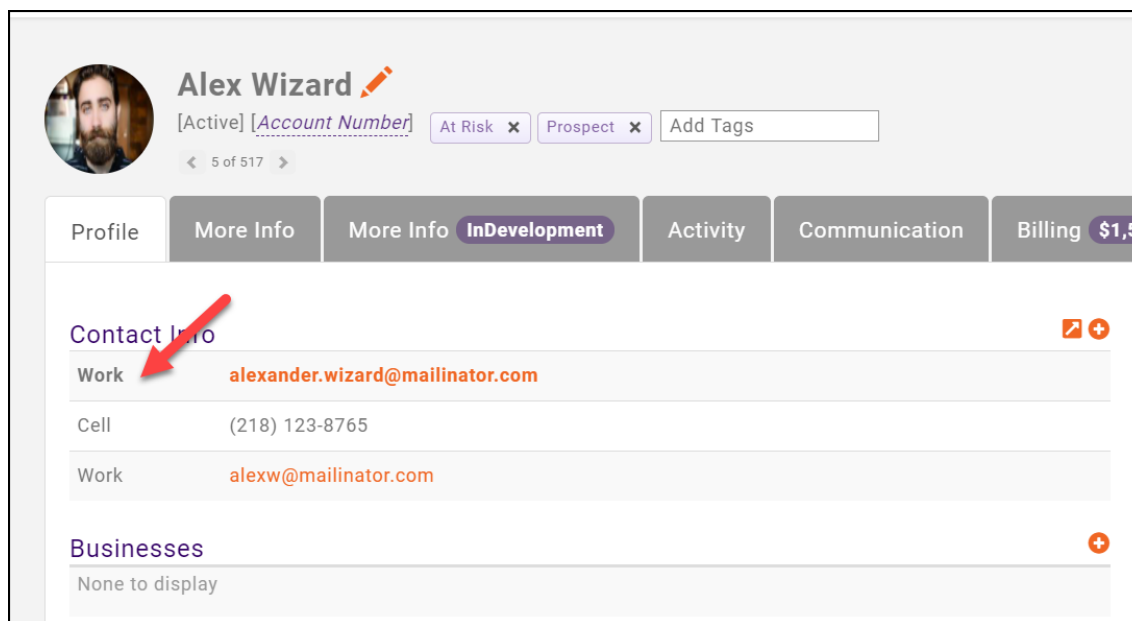
## Priority Ranking...

- ✓ 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 a user profile for Alex Wizard. The profile includes a profile picture, name, and status [Active]. Below the name are tags: [Account Number], [At Risk], and [Prospect], along with an 'Add Tags' button. The profile is viewed on page 5 of 517. The navigation tabs are Profile, More Info, More Info (InDevelopment), Activity, Communication, and Billing (\$1,500). The Contact Info section is expanded, showing three entries: Work (alexander.wizard@mailinator.com), Cell ((218) 123-8765), and Work (alexw@mailinator.com). A red arrow points to the 'Work' label of the first email entry. The Businesses section is currently empty, showing 'None to display'.

# 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

The screenshot shows the 'Show Custom Fields' configuration page. At the top, there are buttons for 'Select All', 'Select None', and 'Reset'. Below that is a search bar. A dropdown menu is open, listing the following custom field types: Full-Time Employees, Part-Time Employees, Lists Committees, Multiple Choice Field, and Other Languages Spoken. The main area of the page contains a grid of settings, each with a checked checkbox and an information icon:

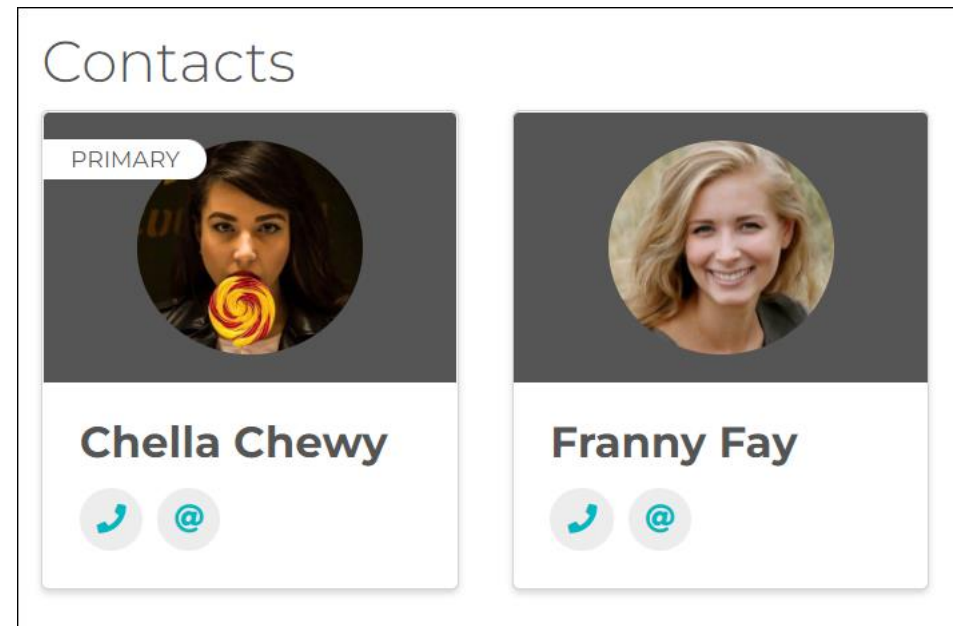
- Show Public Web Content
- Show Membership Type
- Show Search Logo
- Show Search Description
- Show Gallery
- Show Video
- Show Highlights
- Show Map
- Show Bio/Description
- Show Primary Contact Title

# Directory Display Setting

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

- ✓ Show Related Contacts
- ✓ Show Contacts With Memberships
- ✓ Show Primary Contact/Organization




# Directory Display Setting

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

### Options

|   |                                     |                          |                          |
|---|-------------------------------------|--------------------------|--------------------------|
| Use Contacts Website for Listing page  | Open Links in New Tab               |                          |                          |
| <input type="checkbox"/>  | <input checked="" type="checkbox"/> |                          |                          |
| Show Public Web Content   | Show Membership Type                | Show Search Logo         | Show Search Description  |
| <input type="checkbox"/>  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Show Gallery  | Show Video                          | Show Highlights          | Show Map                 |
| <input type="checkbox"/>  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Show Bio/Description  |                                     |                          |                          |
| <input checked="" type="checkbox"/>   |                                     |                          |                          |

# Directories

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You have the ability to display multiple directories on your website!

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

### Directories

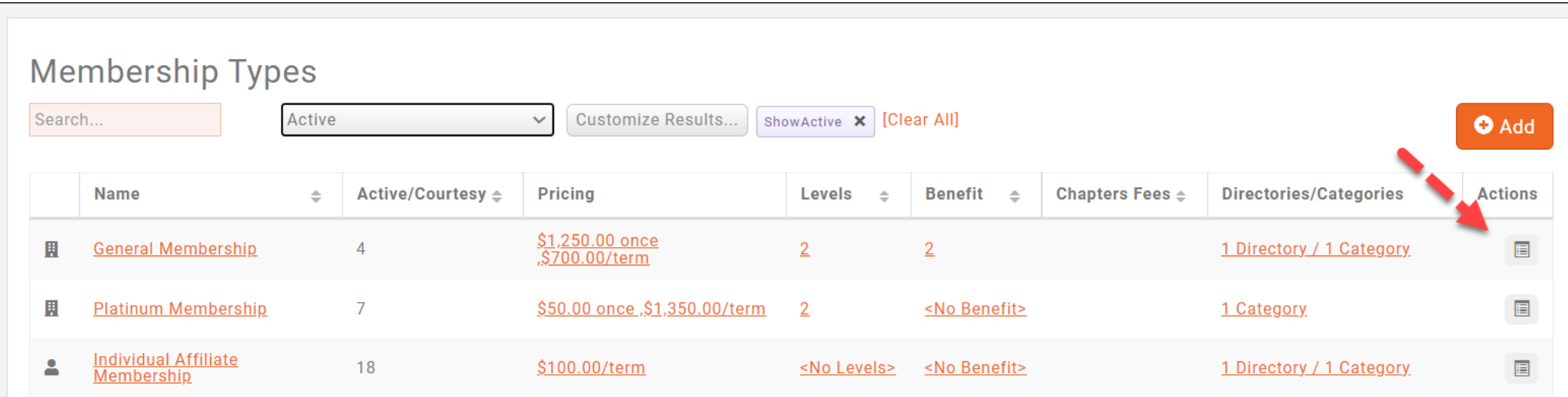
+ Add

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

# 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

Search... Active  ShowActive  [Clear All]

|  | Name  | Active/Courtesy | Pricing   | Levels                            | Benefit                            | Chapters Fees | Directories/Categories                    | Actions |
|--|---|-----------------|---|-----------------------------------|------------------------------------|---------------|---|---------|
|  | <a href="#">General Membership</a>              | 4               | <a href="#">\$1,250.00 once</a><br><a href="#">,\$700.00/term</a> | 2                                 | 2                                  |               | <a href="#">1 Directory / 1 Category.</a> |         |
|  | <a href="#">Platinum Membership</a>             | 7               | <a href="#">\$50.00 once</a> , <a href="#">\$1,350.00/term</a>    | 2                                 | <a href="#">&lt;No Benefit&gt;</a> |               | <a href="#">1 Category.</a>               |         |
|  | <a href="#">Individual Affiliate Membership</a> | 18              | <a href="#">\$100.00/term</a>                                     | <a href="#">&lt;No Levels&gt;</a> | <a href="#">&lt;No Benefit&gt;</a> |               | <a href="#">1 Directory / 1 Category.</a> |         |

# 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" with a dog's profile picture. The profile is active with ID [1234564] and has an "Add Tags" field. A navigation bar includes tabs for Profile, More Info, More Info (InDevelopment), Individuals, Activity, Communication, Billing (\$6,181.25), Web Content, Tasks (10), and an "En" tab. An orange button labeled "+ Add Directory Listing" is visible. Below is a table of directory listings:

| Type           | Name                    | Availability      | Actions |
|----------------|-------------------------|-------------------|---------|
| Deluxe Listing | Active Member Directory | Public & Info Hub | [Edit]  |


A purple dashed arrow points from the "Add Directory Listing" button to the edit icon in the Actions column of the table row.

# 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](#)


### My Directory Listing View Listing in ▾

 **A Place for Dogs**


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).

**CONTACT INFO**


**Mailing** 24400 Smiley Road Nisswa MN 56468 

**Main** (218) 786-0987 

**ADDITIONAL INFO**

**MEMBER DIRECTORY INFO** 

Price:





**DIRECTORY INFO** 


**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.

**KEYWORDS**

**IMAGES**

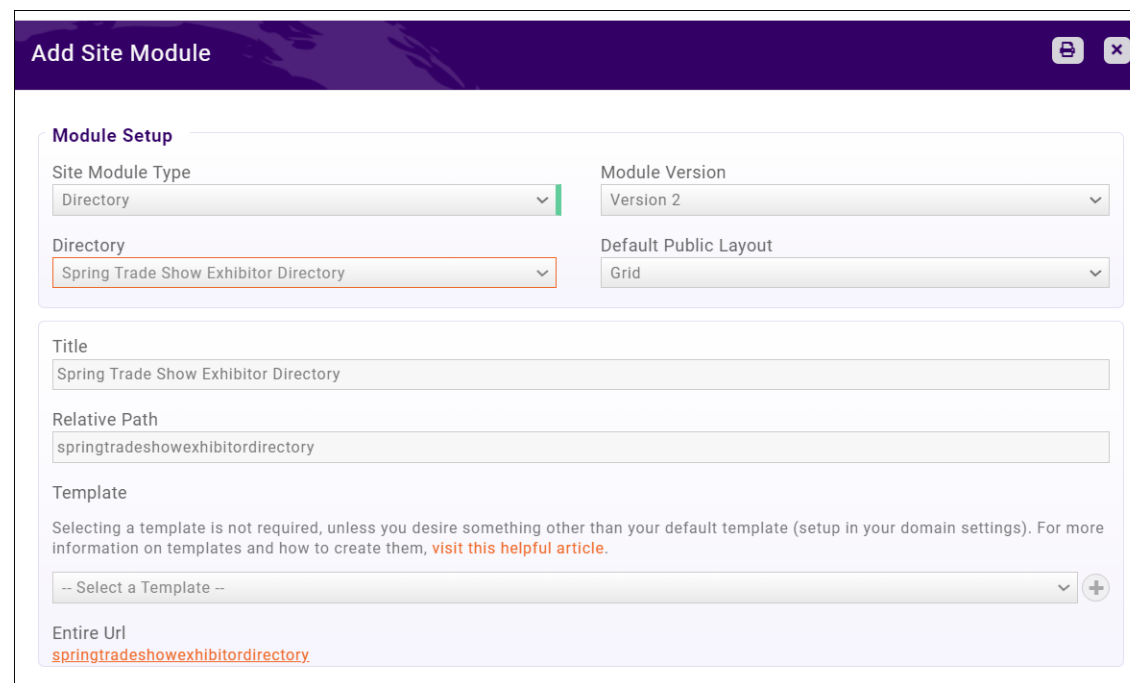
   



# Create URL for Directory

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](#)



The screenshot shows the 'Add Site Module' configuration window. The window has a dark purple header with the title 'Add Site Module' and window control icons. The main content area is light blue and contains several sections:

- Module Setup:** A section with four dropdown menus:
  - Site Module Type: Directory
  - Module Version: Version 2
  - Directory: Spring Trade Show Exhibitor Directory
  - Default Public Layout: Grid
- Title:** A text input field containing 'Spring Trade Show Exhibitor Directory'.
- Relative Path:** A text input field containing 'springtradeshowexhibitordirectory'.
- Template:** A section with a note: 'Selecting a template is not required, unless you desire something other than your default template (setup in your domain settings). For more information on templates and how to create them, [visit this helpful article](#).' Below the note is a dropdown menu with the text '-- Select a Template --' and a plus icon.
- Entire Url:** A text input field containing the URL 'springtradeshowexhibitordirectory'.

Questions?

