

# GrowthZone - Working with Your Directories



# Agenda

Overview

Set up Directory Categories

Set up Directory Listings

Set up Directories

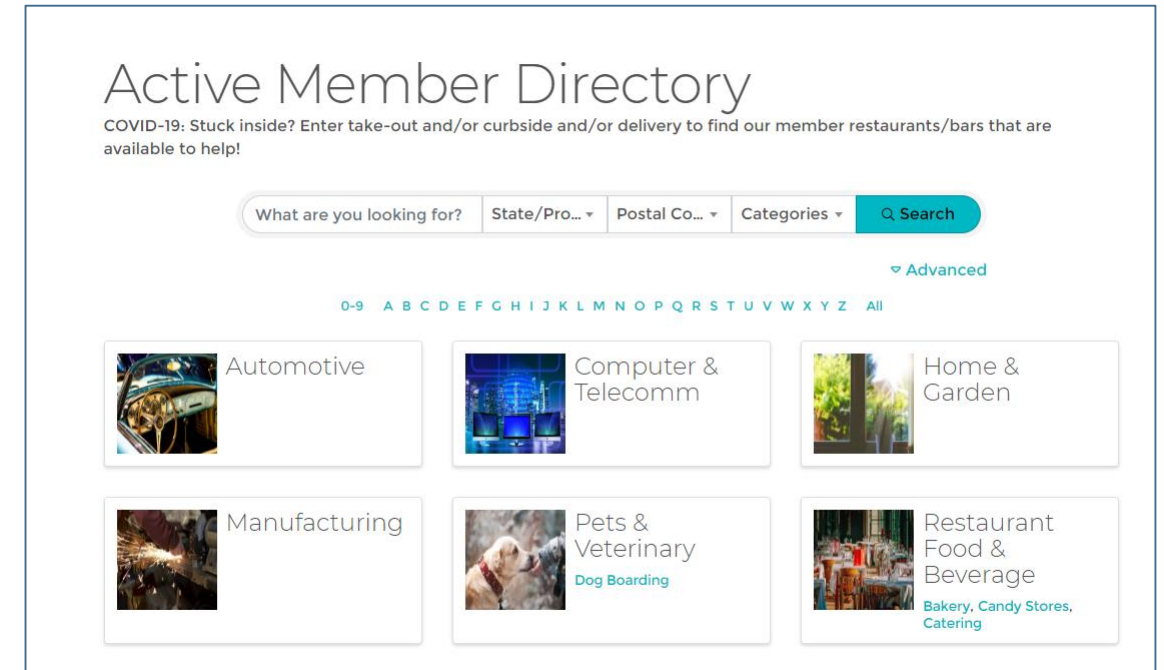
Manage Member Directory Assignment

Directory Reporting

# Overview

Your Membership Directory is a key benefit you can offer to your members....

- ❑ Through the directory, members can gain additional visibility to the general public and other members
- ❑ With your GrowthZone software you create multiple directories, as well as offer different directory listing packages





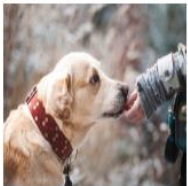



# Setting up Your Directories

# Setup Directory Categories

Directory categories provide a way to categorize your members, making it easy for visitors to your web-site to find just the member they are looking for....

You can organize your categories by Parent/Child categories

 <p>Automotive</p>	 <p>Computer &amp; Telecomm</p>	 <p>Home &amp; Garden</p>
 <p>Manufacturing</p>	 <p>Pets &amp; Veterinary <b>Dog Boarding</b></p>	 <p>Restaurant Food &amp; Beverage <b>Bakery, Candy Stores, Catering</b></p>

# Setup Directory Categories

Create your Directory Categories – two step process:

1. Create a Directory Category List
2. Add Directory Categories to the List

WIKI: [Directory Category Lists](#)

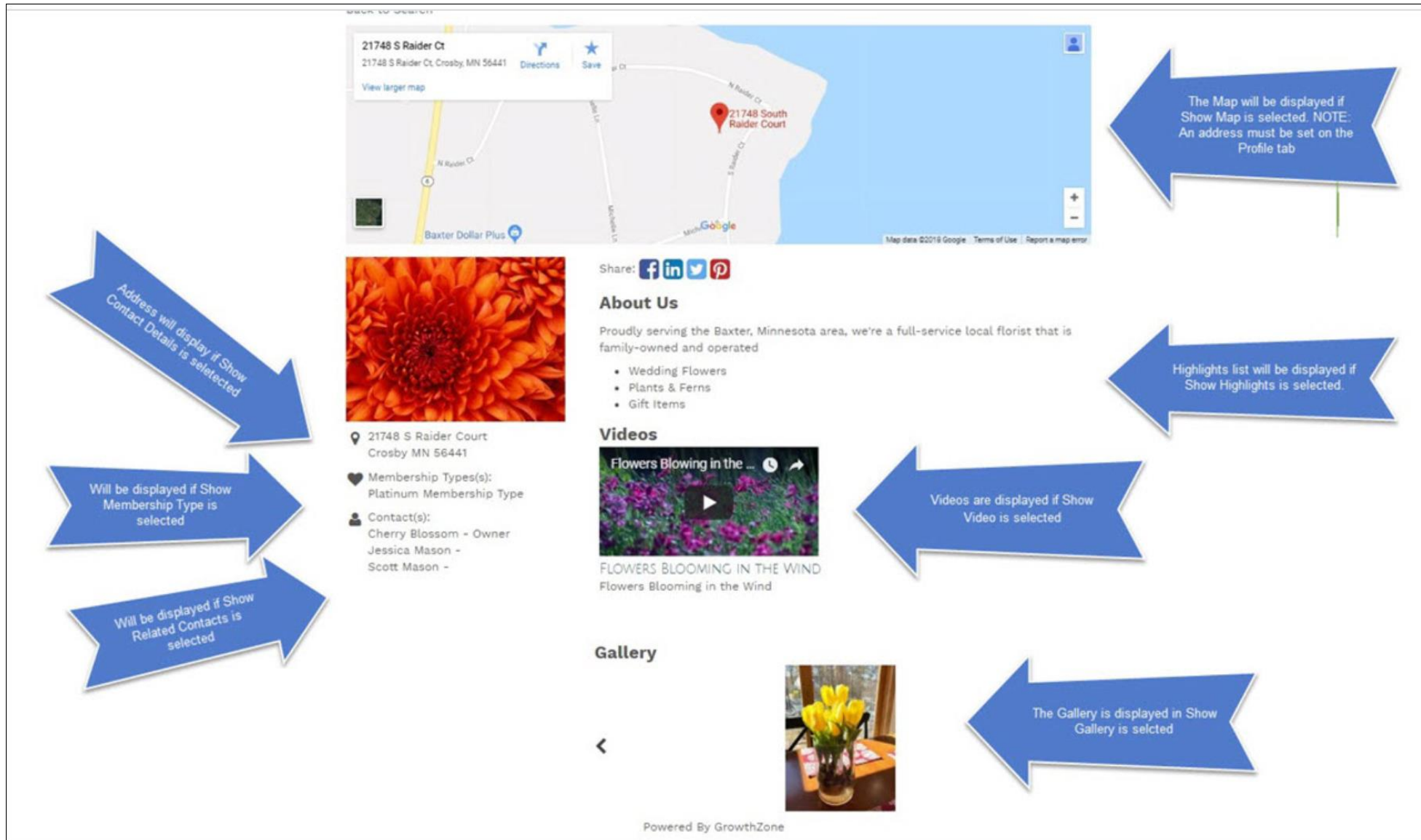
Category Items				<a href="#">+ Add Multiple</a>	<a href="#">+ Add</a>
Name	Parent	Description	Actions		
<a href="#">Manufacturing</a>			<a href="#">×</a>		
<a href="#">Restaurant Food &amp; Beverage</a>			<a href="#">×</a>		
<a href="#">Automotive</a>		Automotive	<a href="#">×</a>		
<a href="#">Candy Stores</a>	Restaurant Food & Beverage		<a href="#">×</a>		

**Directory Display Settings** control what information about a business or individual is displayed if you choose to publish a directory of members to your website.

**Do you want to offer different listing levels?** You may, perhaps, have different levels of listings based on membership type. A basic level might include just a business name and a logo, where as an enhanced listing may include photo galleries, videos, maps, etc.



# Setup Your Directory Display Settings



The screenshot shows a business profile for a florist. The profile includes a map, an 'About Us' section, a 'Videos' section, and a 'Gallery' section. Blue callout boxes with arrows point to various elements, explaining when they will be displayed based on user settings.

**Map:** The Map will be displayed if Show Map is selected. NOTE: An address must be set on the Profile tab

**Address:** Address will display if Show Contact Details is selected

**Membership:** Will be displayed if Show Membership Type is selected

**Related Contacts:** Will be displayed if Show Related Contacts is selected

**Highlights:** Highlights list will be displayed if Show Highlights is selected.

**Videos:** Videos are displayed if Show Video is selected

**Gallery:** The Gallery is displayed in Show Gallery is selected

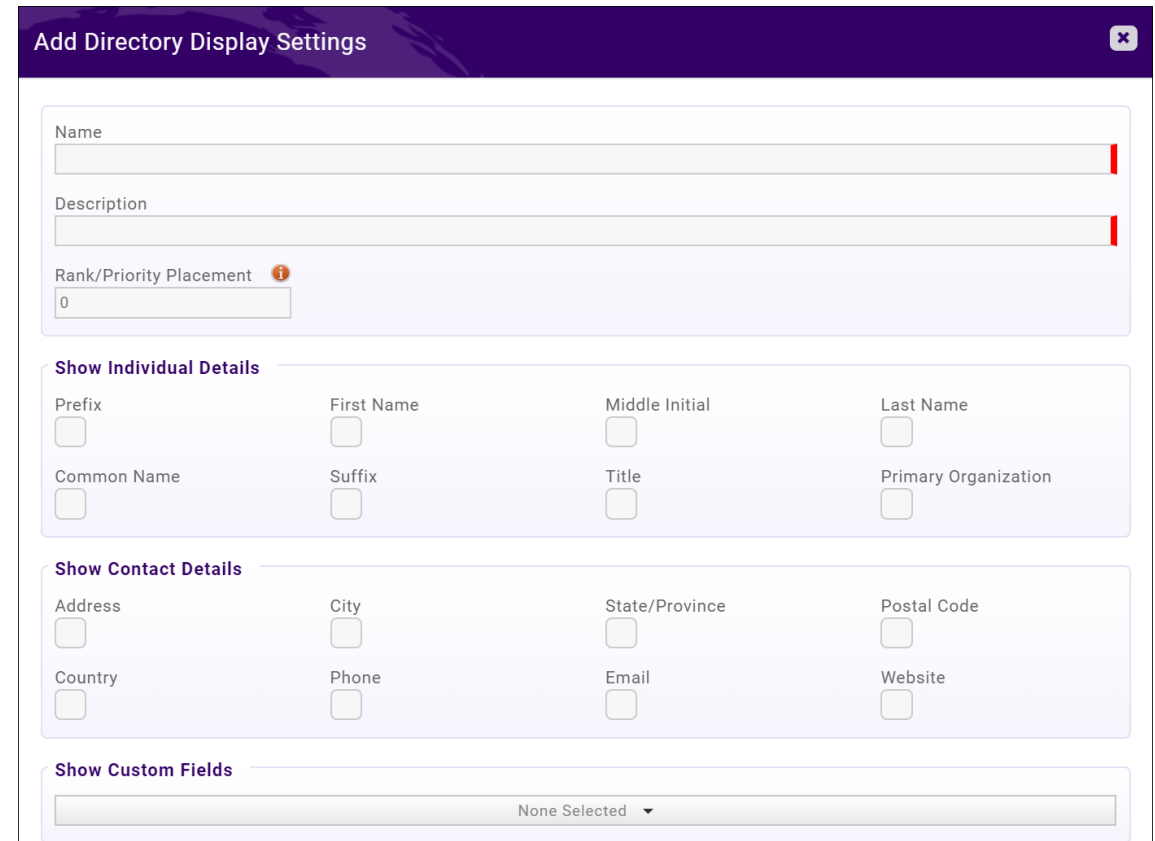
Powered By GrowthZone

# Setup Your Directory Display Settings

What information do you wish to display:

- Names?
- Addresses?
- Phones?
- Emails?
- Custom Fields?
- Related Contacts?
- Highlights?
- Photos/Videos/Search Logo?

WIKI: [Setup Directory Display Settings](#)



The screenshot shows a web form titled "Add Directory Display Settings" with a close button in the top right corner. The form contains several input fields and sections:

- Name:** A text input field.
- Description:** A text input field.
- Rank/Priority Placement:** A numeric input field with an information icon and a value of "0".
- Show Individual Details:** A section with a header and a horizontal line. It contains eight checkboxes arranged in two rows:
  - Row 1: Prefix, First Name, Middle Initial, Last Name.
  - Row 2: Common Name, Suffix, Title, Primary Organization.
- Show Contact Details:** A section with a header and a horizontal line. It contains eight checkboxes arranged in two rows:
  - Row 1: Address, City, State/Province, Postal Code.
  - Row 2: Country, Phone, Email, Website.
- Show Custom Fields:** A section with a header and a horizontal line. It contains a dropdown menu currently showing "None Selected".

# Setup Your Directory(ies)

You system will contain a default directory, Active Member Directory. This directory is tied to your Business Category and may contain all of your valued members.

Do you want multiple directories?

- ❑ You can create as many directories as needed to support your members. Perhaps directories that represent several different entities (for example Chapters) or categories (Restaurants?)

# Setup Your Directory(ies)

## WIKI: Setup Directories

### Add Directory ✕

Name

Display Name

Description

Display Settings   Sort Order

**Category Lists (Categories displayed on the front page)**

Category List

**Ordering**

Order Category Results

**Availability**

Available to Public  Available to Info Hub

**Search Filtering** ⓘ

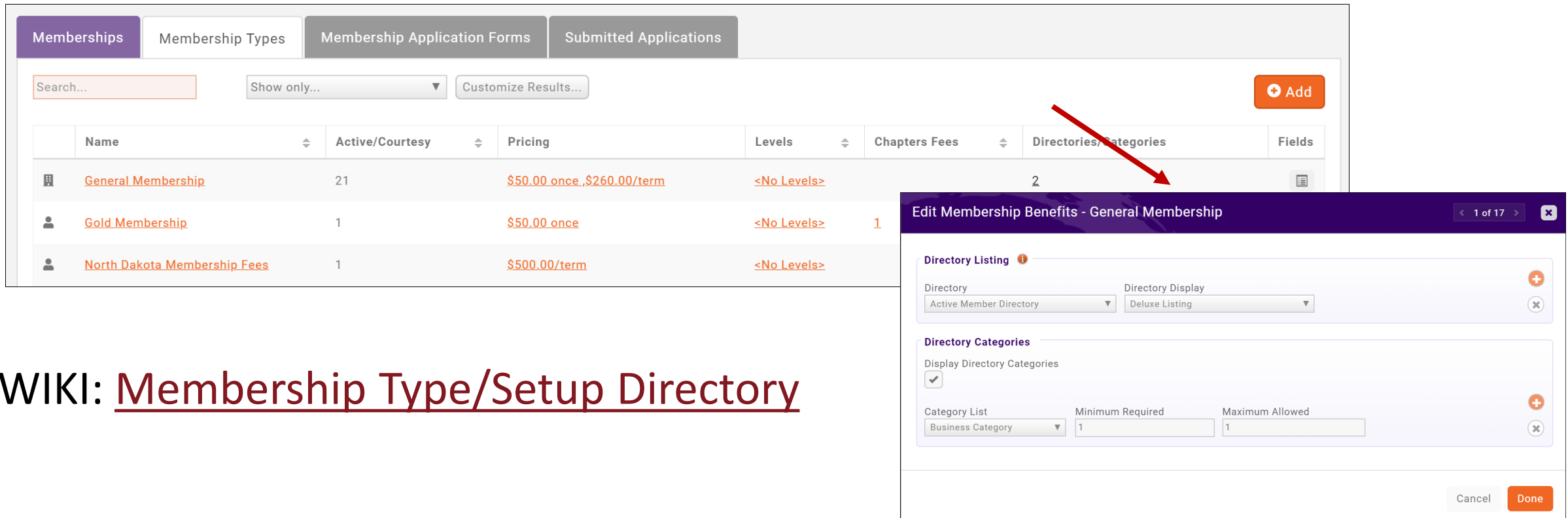
Enable Advanced Search and Filtering

Advanced Options

# Assigning Directories

# Membership Type Setup...

- ❑ You can setup your membership types to allow applicant to select category(ies)  
You can tie a Directory and listing to a membership type
- ❑ If you have setup your membership types to allow selection of categories, new applicants can assign themselves to categories



Memberships | Membership Types | Membership Application Forms | Submitted Applications

Search... Show only... Customize Results... + Add

Name	Active/Courtesy	Pricing	Levels	Chapters Fees	Directories/ Categories	Fields
General Membership	21	\$50.00 once, \$260.00/term	<No Levels>		2	
Gold Membership	1	\$50.00 once	<No Levels>	1		
North Dakota Membership Fees	1	\$500.00/term	<No Levels>			

**Edit Membership Benefits - General Membership** < 1 of 17 > X

**Directory Listing** ⓘ

Directory: Active Member Directory Directory Display: Deluxe Listing

**Directory Categories**

Display Directory Categories:

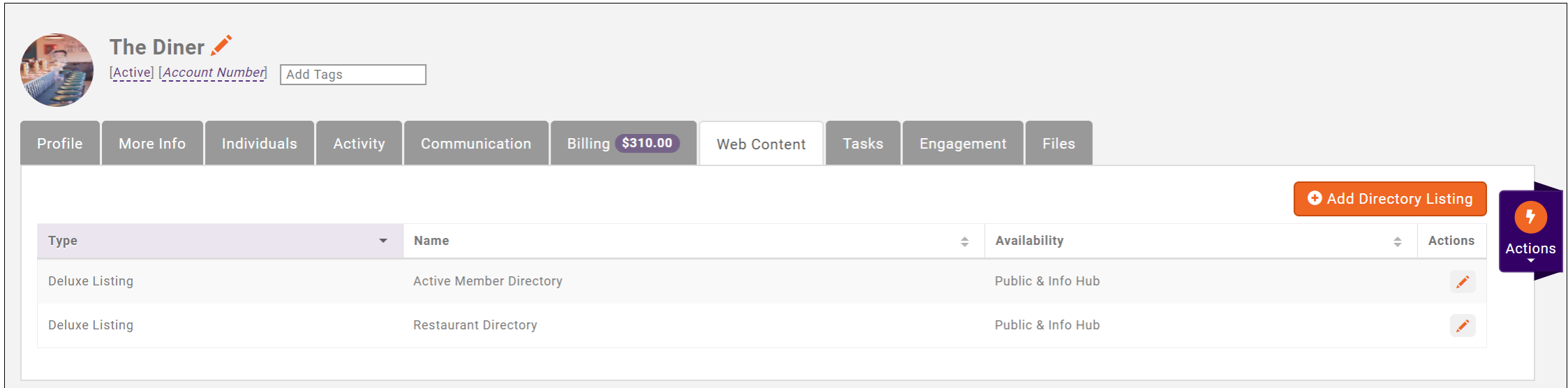
Category List: Business Category Minimum Required: 1 Maximum Allowed: 1


Cancel Done

WIKI: [Membership Type/Setup Directory](#)

# Manually Assign a Directory/Directory Listing



You can add/remove a member's Directory/Listing Type on the member's Web Content tab



**The Diner**   
[Active] [Account Number] Add Tags

Profile More Info Individuals Activity Communication Billing **\$310.00** Web Content Tasks Engagement Files

**+ Add Directory Listing**

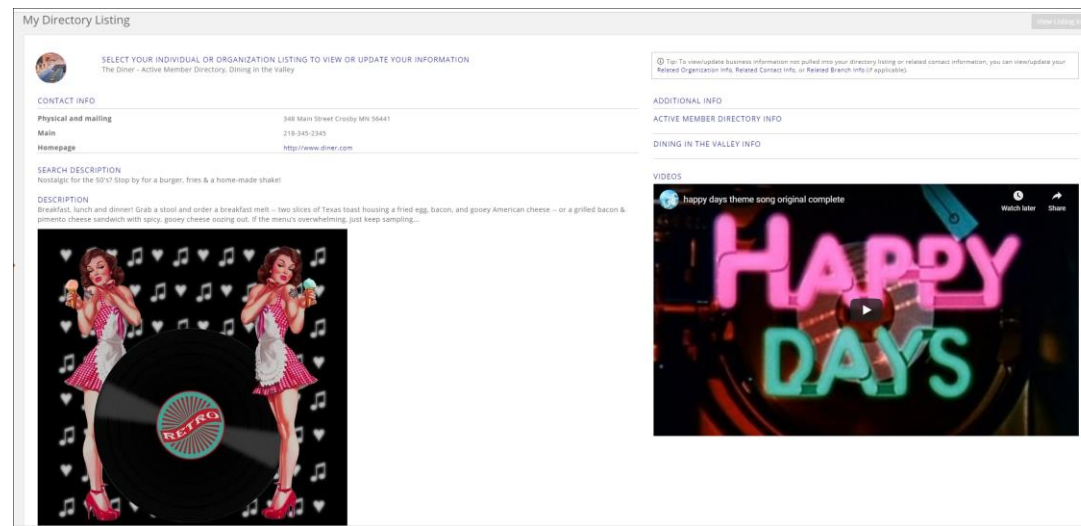
Type	Name	Availability	Actions
Deluxe Listing	Active Member Directory	Public & Info Hub	
Deluxe Listing	Restaurant Directory	Public & Info Hub	

Actions

WIKI: [Add a Directory Listing](#)

# Update Member's Web Information

You can update a member's web information from the back office, or the member (if given permission to do so) can update via the Info Hub



WIKI: [Update a Member's Directory Listing](#)

VIDEO: [How to update company and directory information in the Info Hub](#)



# Remove a Member's Directory Listing

- ❑ If a member is dropped, and they have a membership that includes a directory listing, this is automatically removed
- ❑ If you have manually added a directory listing to a member, when you drop, there will be an option to select “Remove All Directory Listings”
- ❑ If you wish to manually remove a member from a listing, you will be able to do this on the member's Web Content tab
  
- ❑ WIKI: [Remove a Directory Listing](#)

# Directory Reporting

- ❑ The Contacts Report can be used to view the categories assigned to your members
- ❑ Special Note: Two separate fields are available for categories when generating the report:
  - All Business Categories: Displays a comma separated list of all the business-type categories associated to the contact record.
  - Business Categories: Displays a separate line for each category attached to the business record.
- ❑ WIKI: [Contacts Report](#)

Contact Name ⇅	Default Email ⇅	Default Phone ⇅	Business Category ⇅	All Business Categories ⇅
A Place for Dogs	cheri.petterson@growthzone.com		Dog Boarding - Pets & Veterinary	Pets & Veterinary,Dog Boarding - Pets & Veterinary
A Place for Dogs	cheri.petterson@growthzone.com		Pets & Veterinary	Pets & Veterinary,Dog Boarding - Pets & Veterinary
Addams and Sons				
Aiden Greene	aiden@mailinator.com	123-456-7890		
Allison Greggs	allison@mailinator.com			
Allison Wilson	wilson@mailinator.com			

Questions??

