ARMCP InfoHub Wiki

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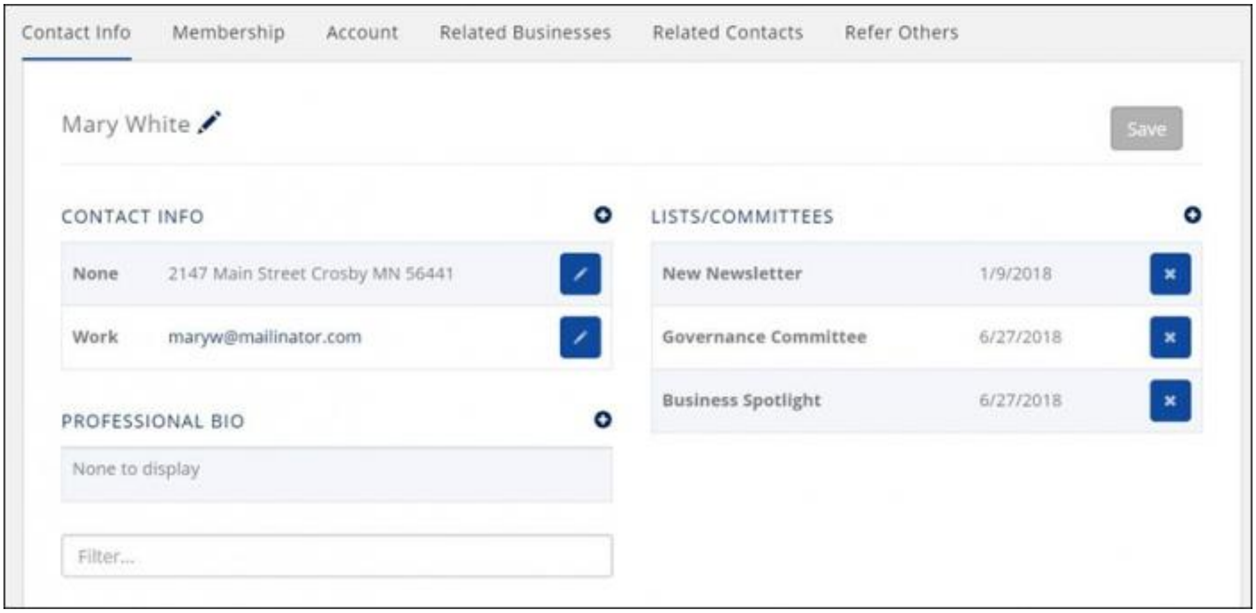
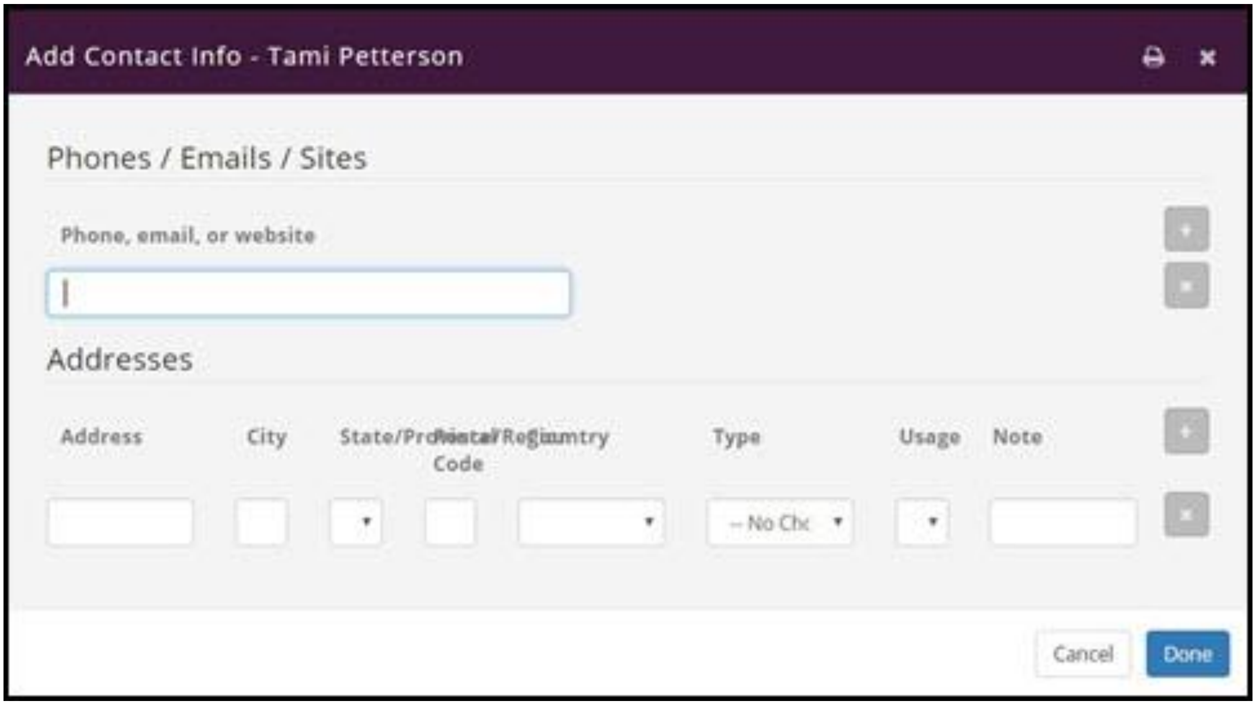
Update Contact Information in the Info Hub

You may update your **own** existing contact information or add new contact information in the **Info Hub**.

1. Click **My Info** in the Navigation Panel. The screen will display the **Contact info** tab.



2. Click the icon in Contact Info to add additional contact details **OR** click the pencil icon to edit existing contact details.



3. The **LISTS/COMMITTEES** section will display committees to which you belong.
    - You can click the **X** adjacent to a list/committee that you no longer wish to belong to, **OR**
    - You can click the ⊕ icon in the **Lists/Committees** section to view the lists/committees available to join and join.

Update Related Businesses Information

You may update related organization information via the Info Hub.

1. Click **My Info** in the Navigation Panel.
2. Click the **Related Businesses** tab.

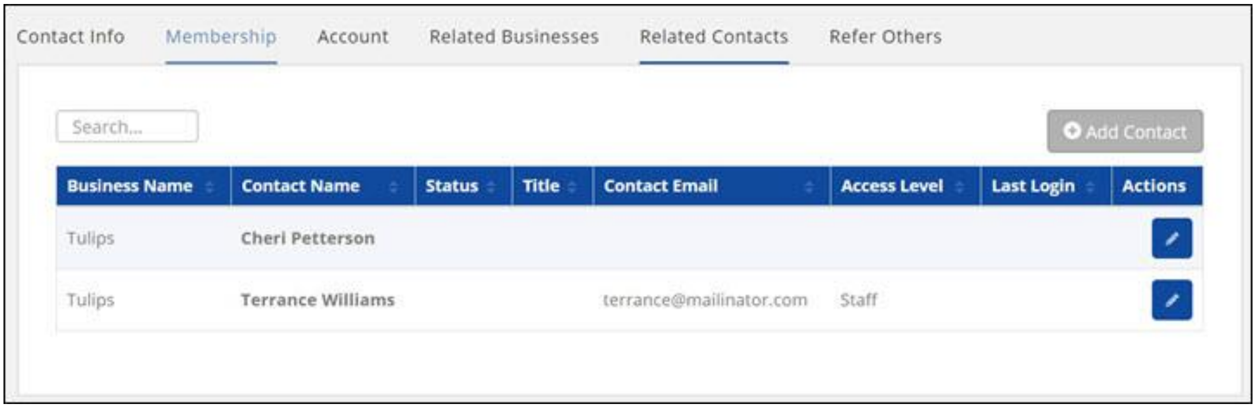
3. Click the  icon to add additional organization information. **NOTE:** You must have **Create** privileges to add new information.

OR

4. Click the  to edit existing information.
5. Click **Save** if changes have been made.

Update Related Contacts

1. Click **My Info** in the Navigation Panel.
2. Click the **Related Contacts** tab.



3. Click the **Add Contact** button to add a new contact. **NOTE: Create** privileges are needed to add new information.

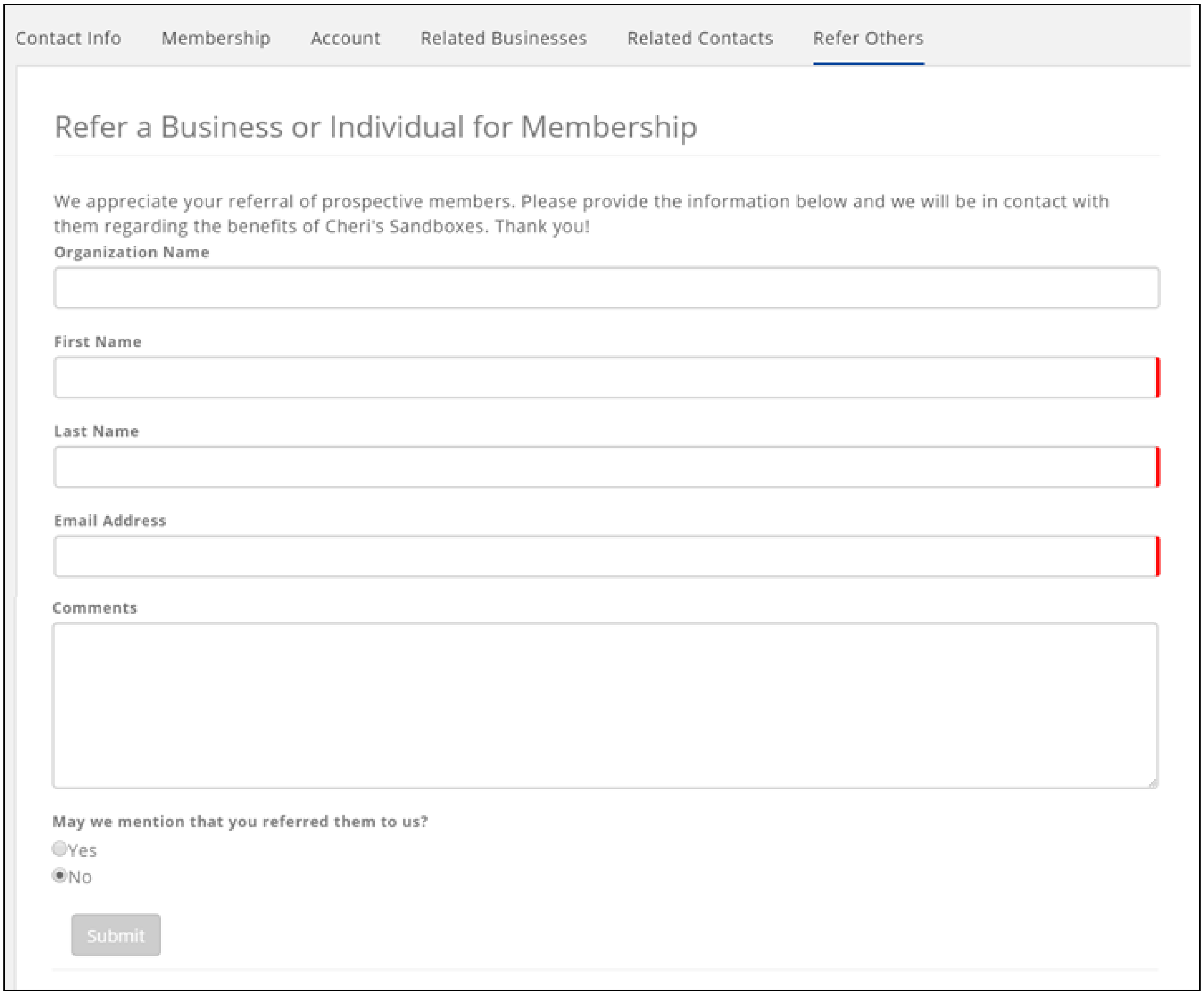
   OR

4. Click the  to edit existing information. **NOTE:** This option also allows the member to send the reset password email to the contact.
5. Click **Save** if changes have been made.

Send a Referral

The Info Hub makes it easy for you to refer non-members to your organization, by selecting **My Info** and clicking the **Refer Others** tab.

1. Click **My Info** in the Navigation Panel.
2. Click the **Refer Others** tab.

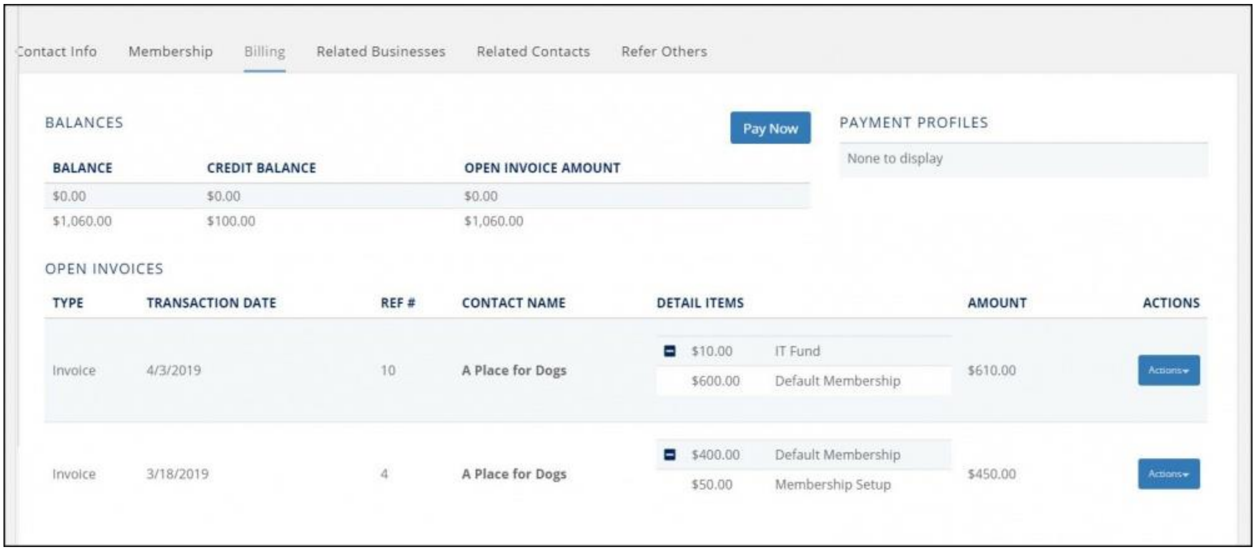


3. Fill in the required field (**Organization**, **First Name**, **Last Name**, **Email Address**)
4. (Optional) Enter **Comments**.
5. Select whether the organization may mention you as the person who referred them.
6. Click **Submit**.

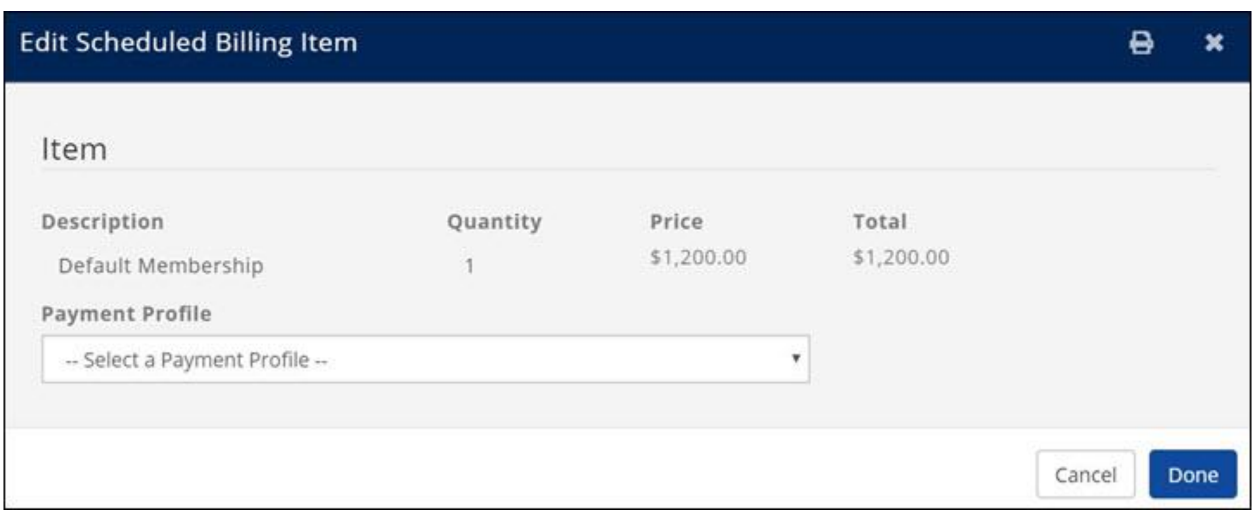
View Billing Transactions and Pay Invoices

You may view your account history and pay bills within the Info Hub.

1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.



- **Balances**: The balances section will display the current balances.
- **Payment Profiles**: Any stored payment profiles will be displayed in the section. See **Store Credit Cards in the Info Hub** for details on adding stored payment profiles.
- **Open Invoices**: The open invoices section will display all of the open invoices.
- **Scheduled Billing Items**: This section displays any current recurring billing configured for the member. You may **ONLY** assign or change the stored payment profile associated to the schedule (by clicking the icon). A change to the actual schedule must be made by staff in the back office.



- **Billing History**: This section will display all transaction history, including payments, invoices, refunds, credits and so on.

The **Pay Now** button is only displayed if the member has a balance. section is displayed on the Info Hub Home Page.

Store Credit Cards

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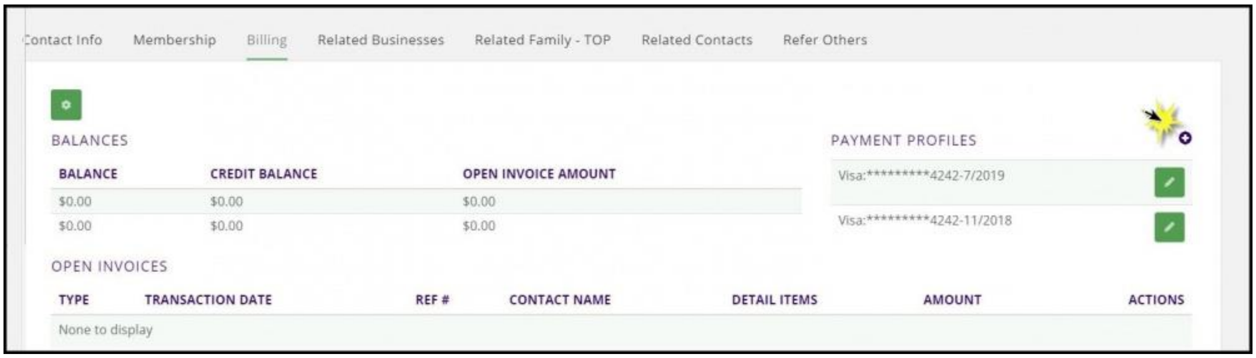
1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.



3. Click the  icon in the **Payment Profiles** section.
   - **Associate With**: This setting allows you to define whether the profile is associated to the user or the organization. By default, the name of the user logged into the Info Hub will be displayed.
   - **Payment Profile Type**: Select **Credit Card**
   - Enter all required credit card and address information.
4. Click **Done**.

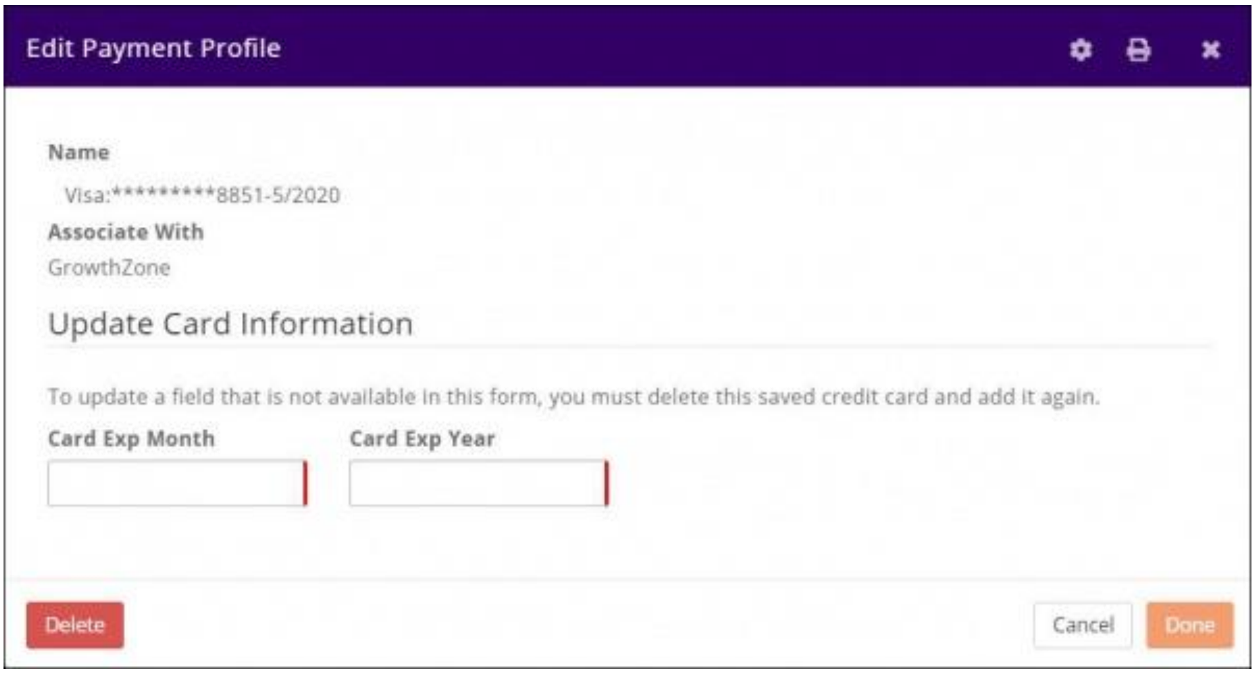
The credit card is now available to the user/organization for payment of bills through the Info Hub, when registering for events, purchasing from the store, etc. Additionally, the credit card is available in the back-office for payment of bills and setting up automated payments.

Edit Expiration Date of Credit Card Stored in the Info Hub

!	**NOTE:** You can only edit the expiration month & year for an existing card. If you need to update the CVC of the card, you must delete the card and enter the new card with new CVC.

1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.

3. Click the  for the credit card you wish to edit.

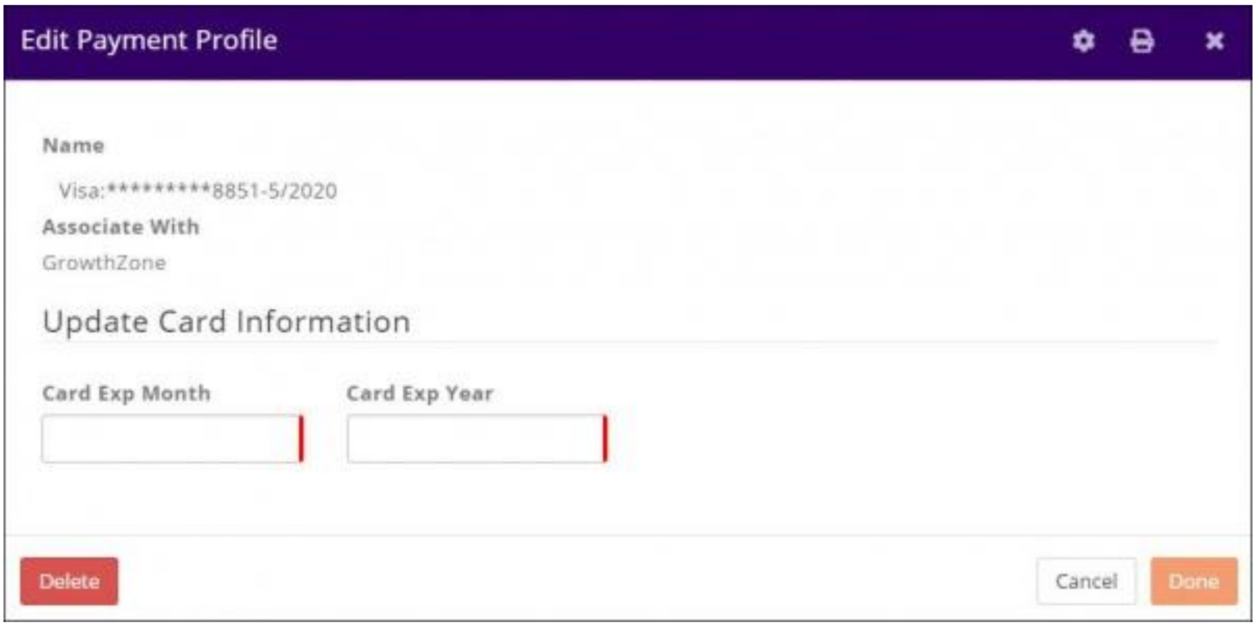


4. Update desired information.
5. Click **Done**.

Delete a Credit Card Stored in the Info Hub

1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.

3. Click the  for the credit card you wish to delete.

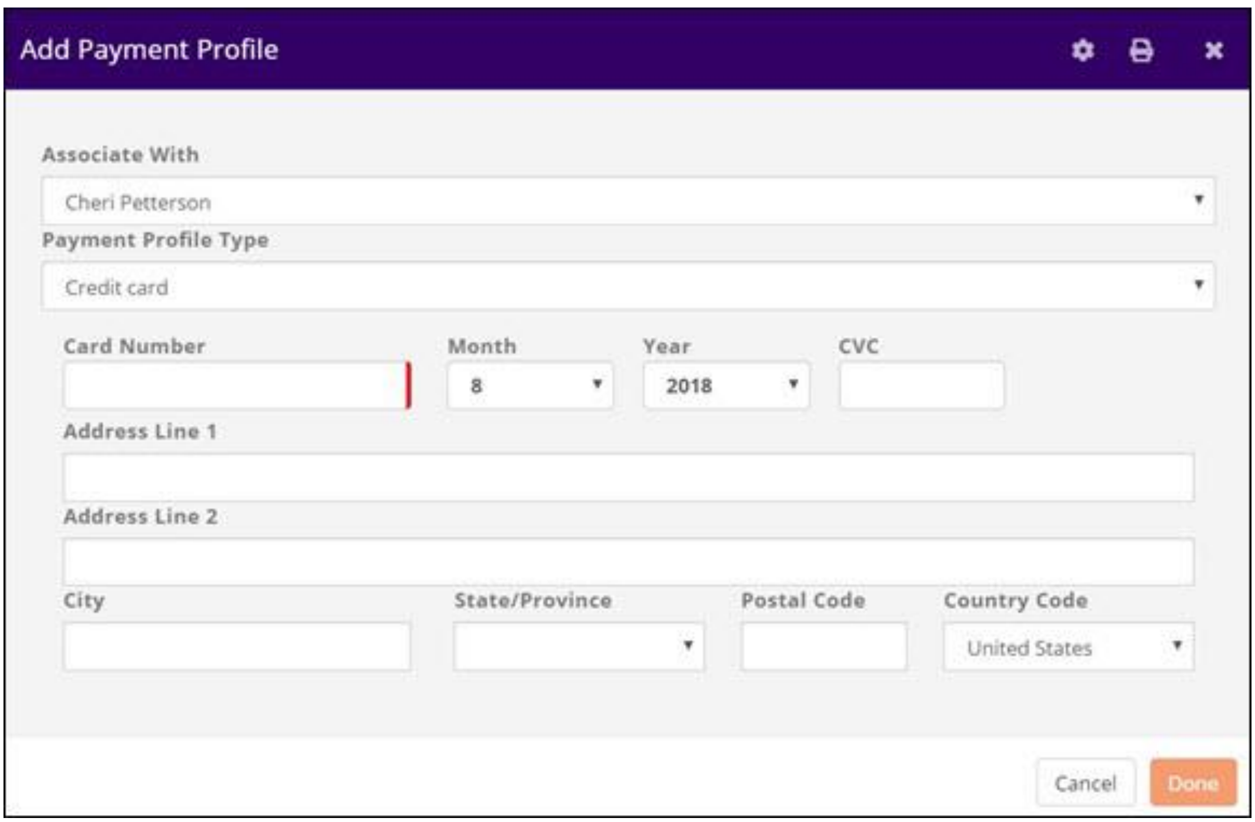


4. Click **Delete**.

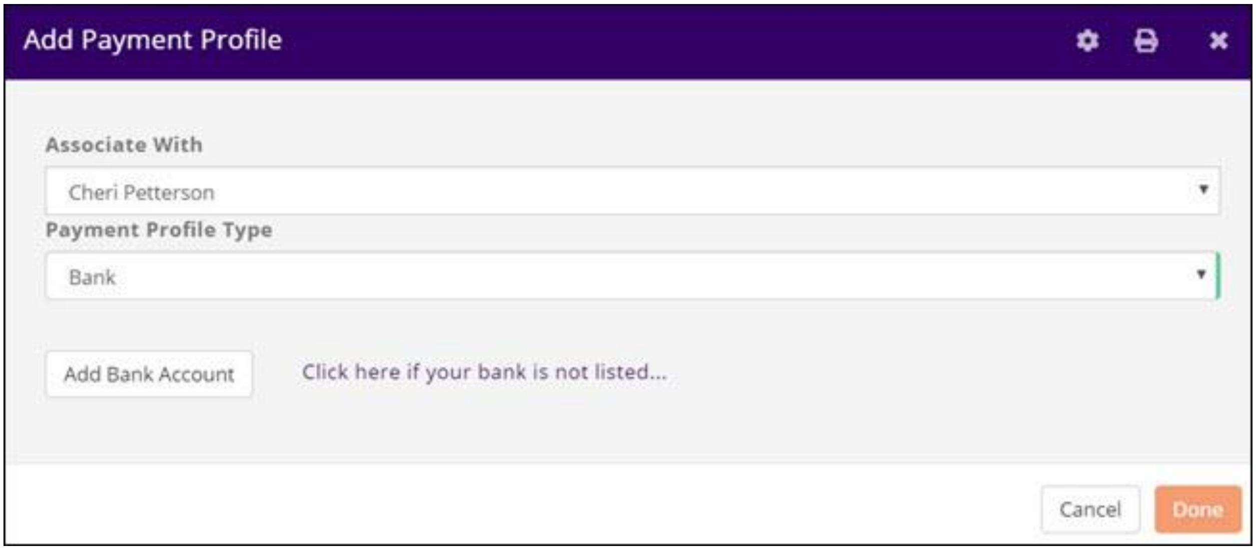
Store Bank Account Profile

1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.

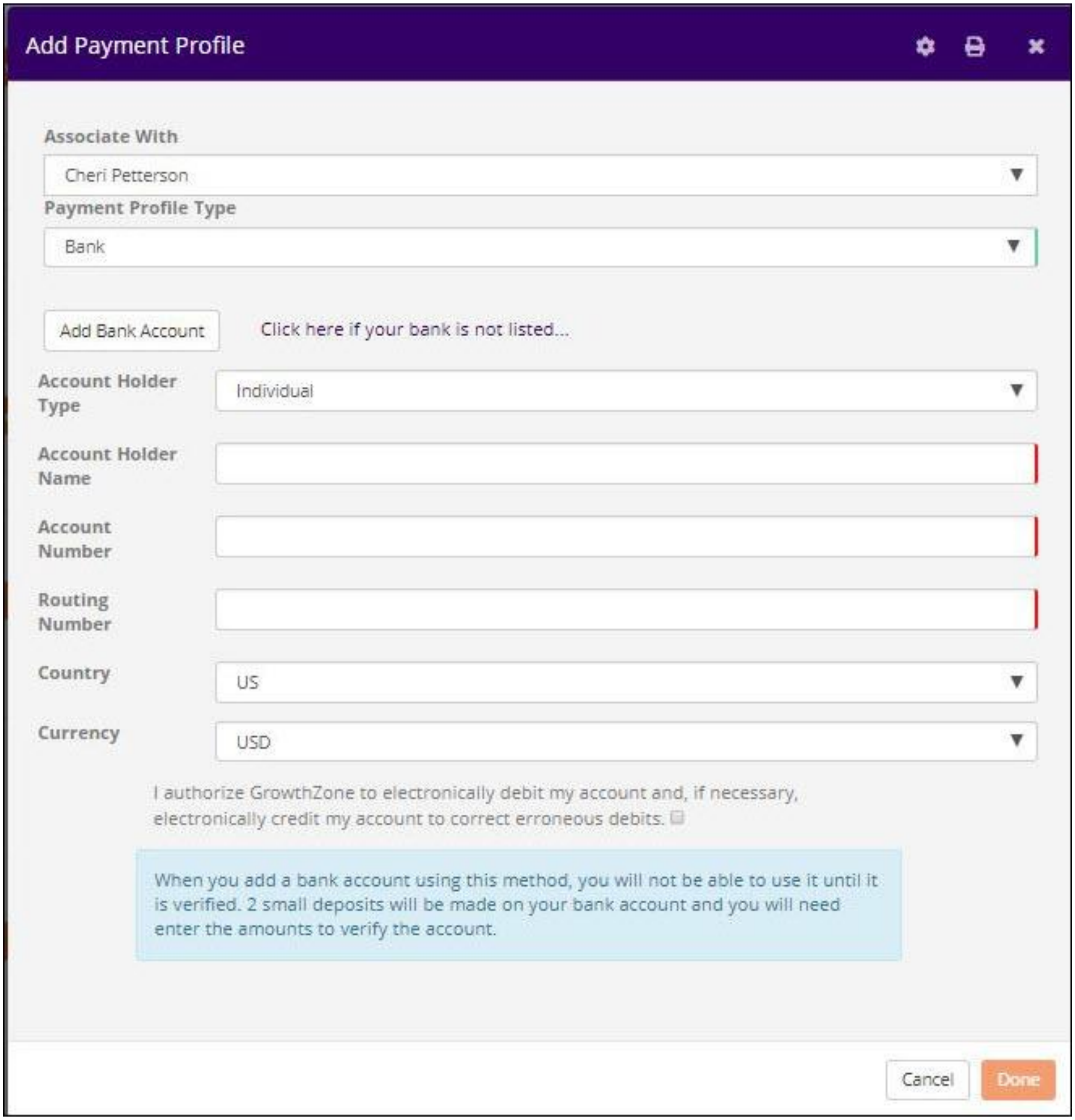
3. Click the icon in the **Payment Profiles** section.



4. Select **Bank** from the **Payment Profile Type** drop-down list.



5. Click the **Click here if your bank is not listed...** hyper-link. **NOTE:** You may click **Add Bank** however, it would then be necessary to select your bank, and enter log-in credentials for that bank.

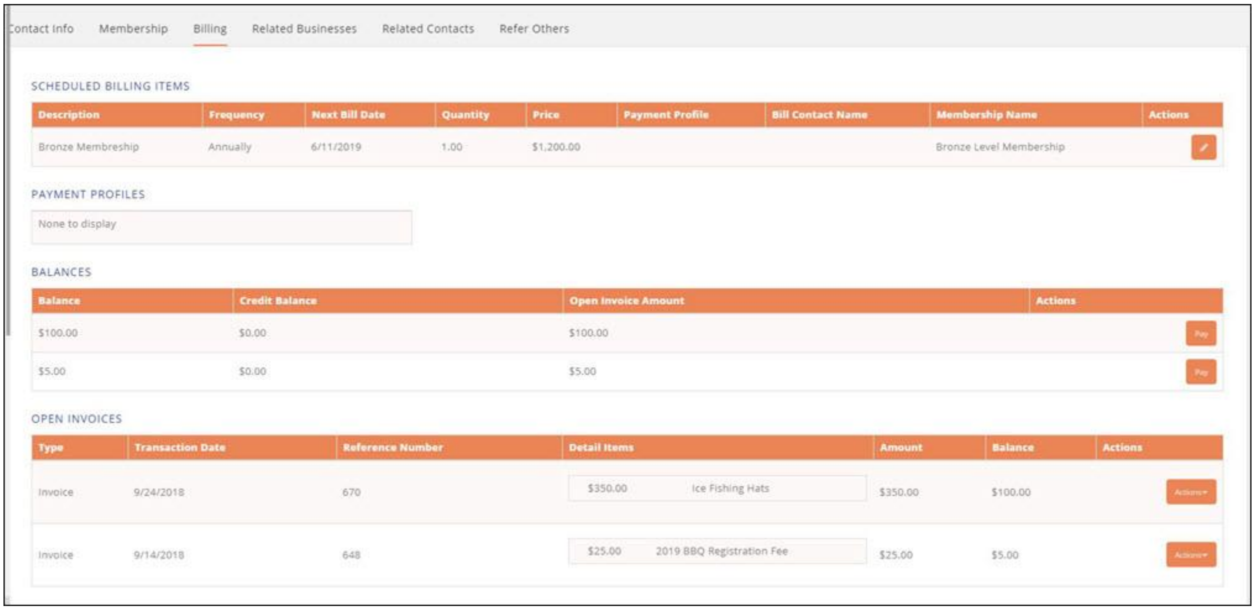


Enter all required bank information.

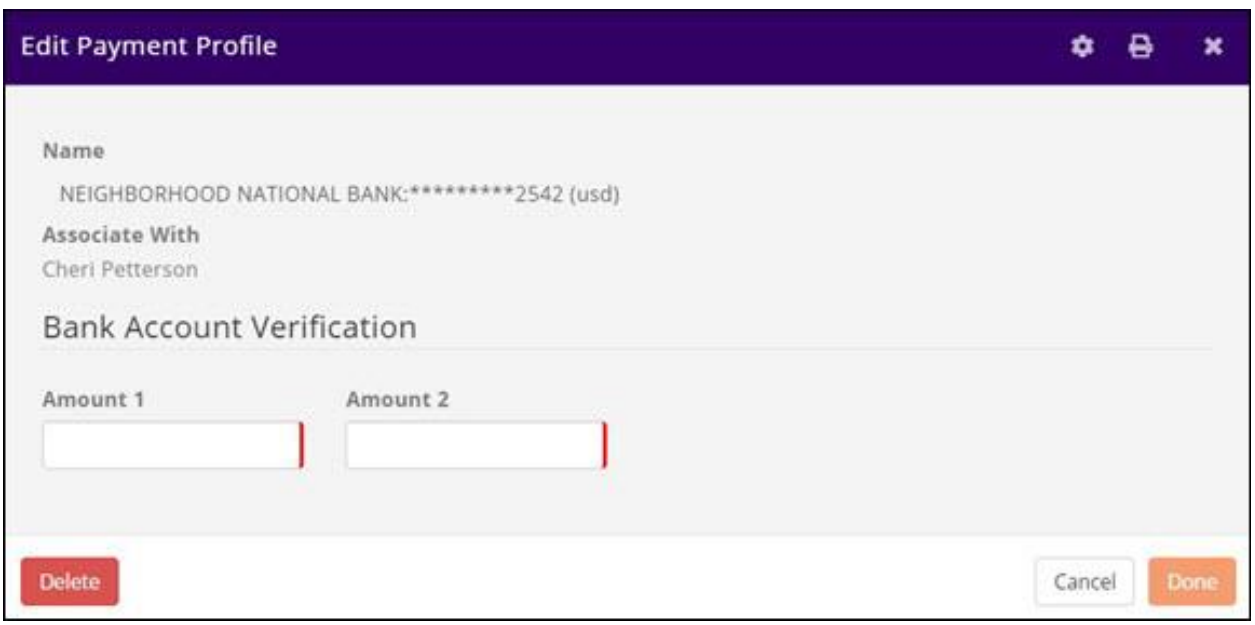
6. Click the checkbox - **I authorize ARMCP to electronically debit my account and, if necessary, electronically credit my account to correct erroneous debits.**
7. Click **Done**.

The bank account will initially be displayed as **(Un-Verified)**, it is not available for use until it has been verified. To verify that the account is valid, two small deposits will be made to bank account. The user will need to return to the stored profile to verify the account by entering the amounts of the two small deposits:

1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.



3. Click the  next the **Unverified** bank account.

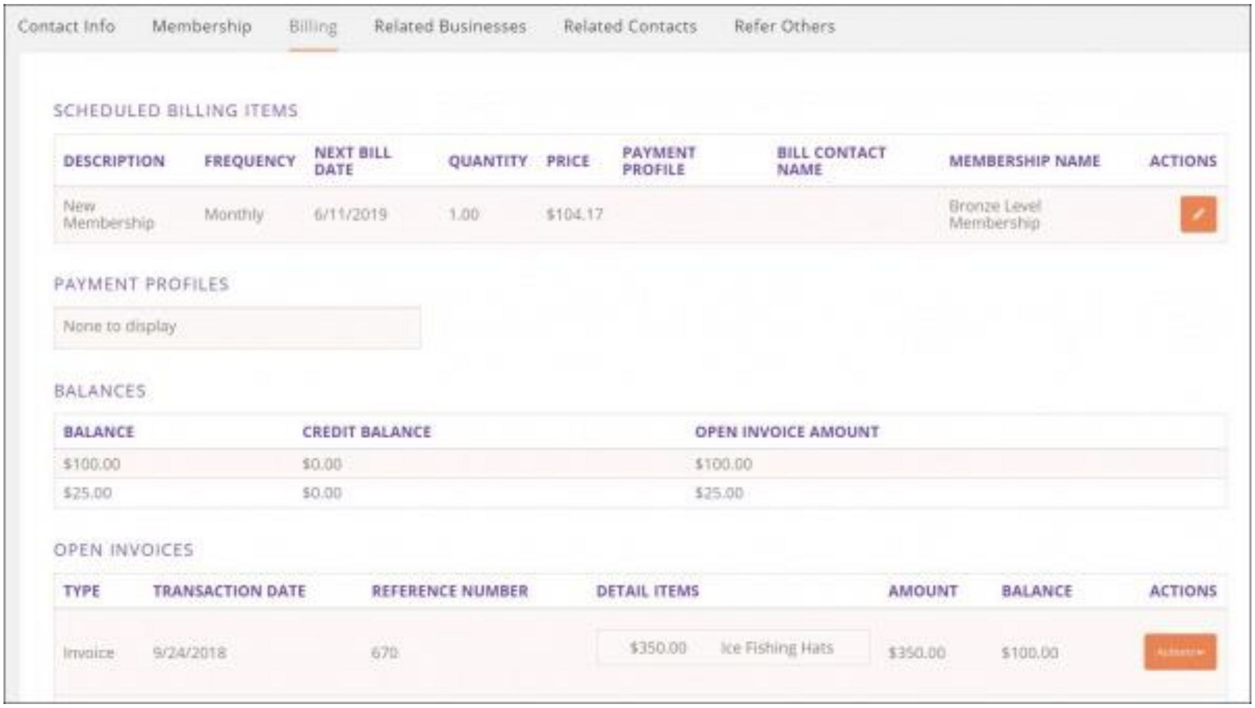


4. Enter the amount of the deposits made to the bank account in the **Amount 1** and the **Amount 2** text boxes.
5. Click **Done**.

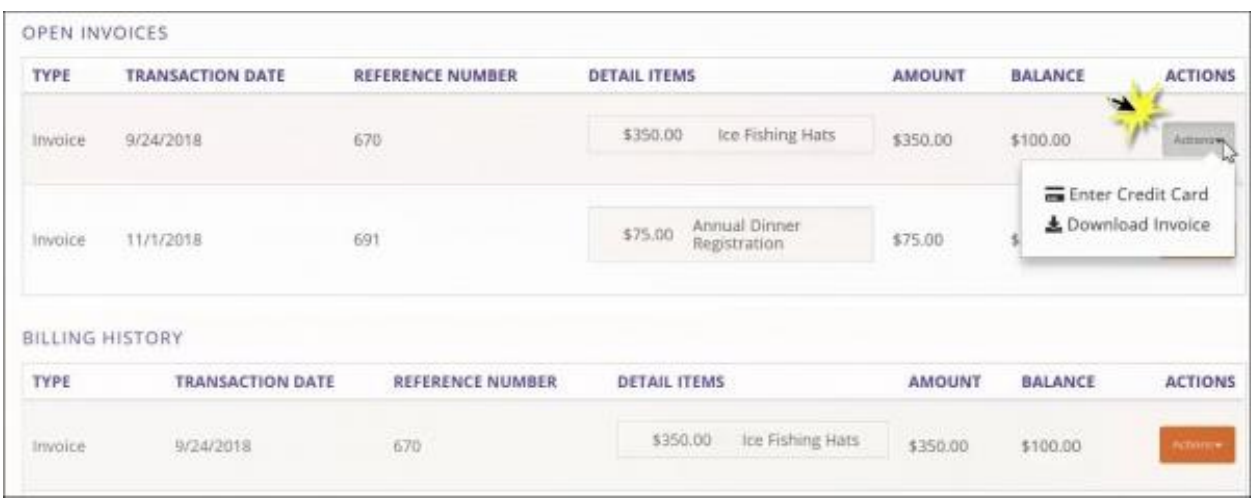
If the deposit amounts are correct, the bank account is now verified and ready for use.

Pay an Invoice

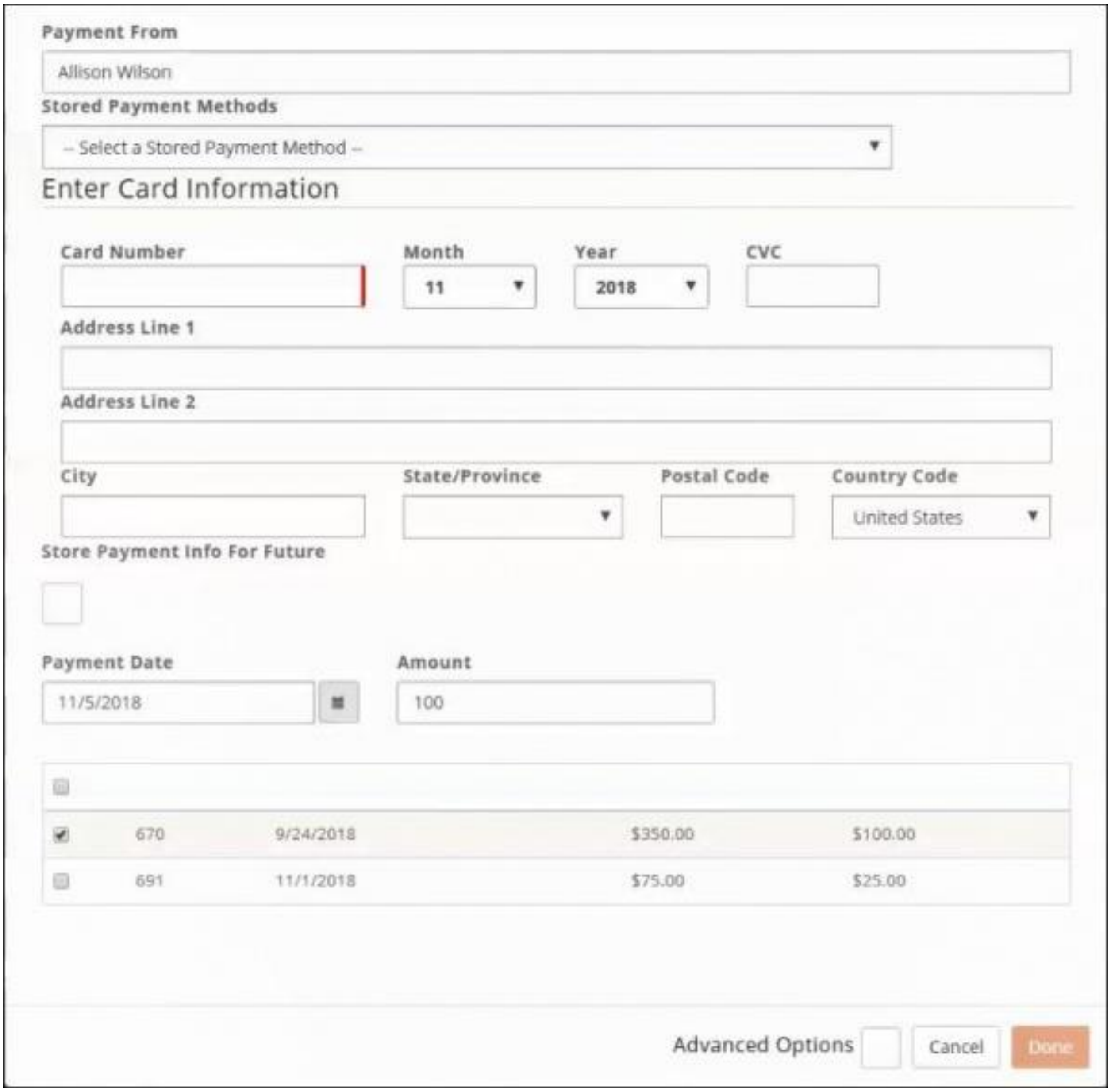
1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.



3. Click the arrow on the **Actions** button for the invoice to be paid.



4. Click **Enter Credit Card**.

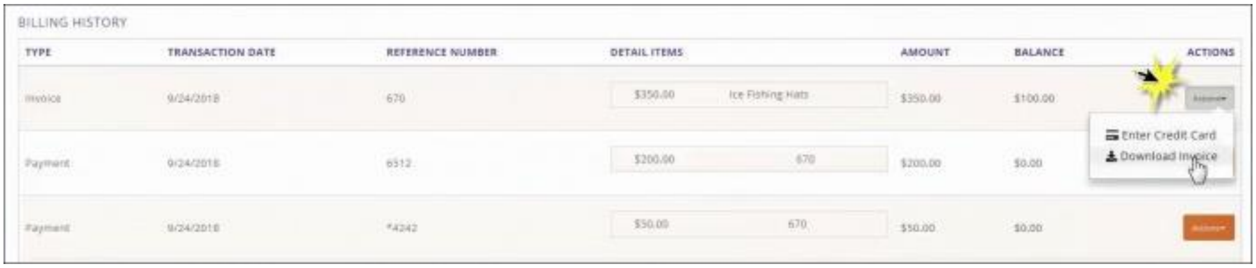


5. Enter Credit Card Information **OR** select a previously stored credit card. If entering a new credit card, you may elect to store the credit card for future purchases by enabling **Store Payment Info For Future**.
6. Select the invoices you wish to pay. **NOTE:** If you wish to pay invoices for other contacts related to the organization, enable the **Advanced Options** and enable the **Display Related Contacts' Invoices**. The invoices for all contacts related to the organization will be displayed in the invoice list for selection.
7. Click **Done**.

Download an Invoice

If you wish a copy of an invoice, you may download it from the **Account** tab in the InfoHub.

1. Click **My Info** in the Navigation Panel.
2. Click the **Billing** tab.

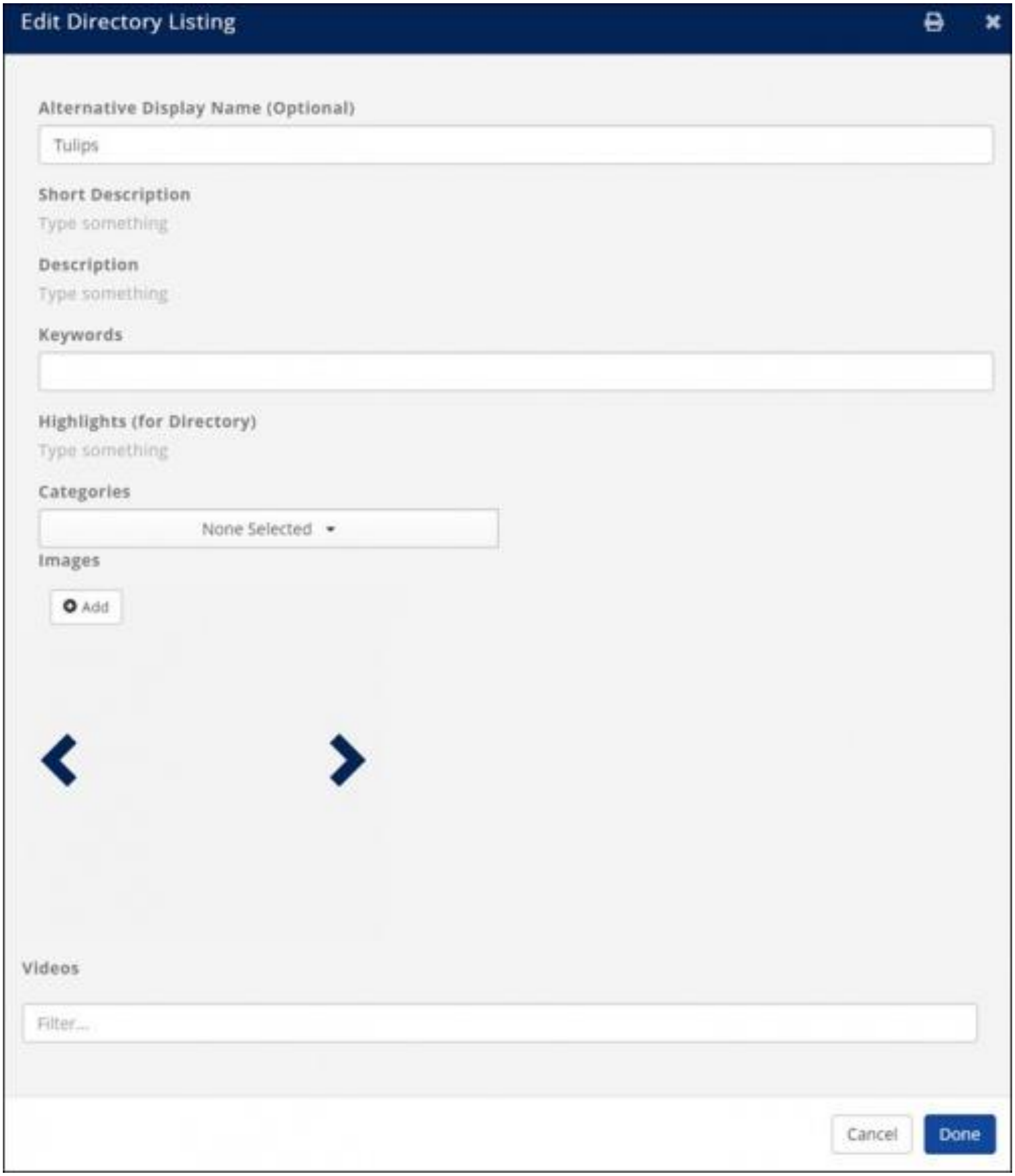


3. In the **Open Invoices** or **Billing History** section, click the arrow on the **Actions** button for the invoice you wish to download.
4. Click **Download Invoice**.

Update Directory Listing Information

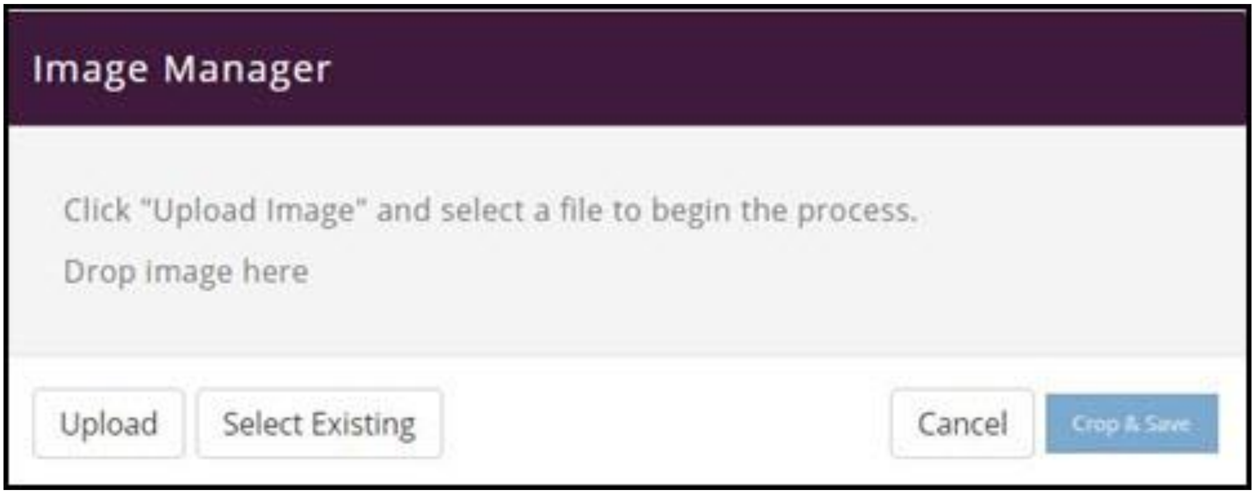
1. Click **Directory Listing** in the Navigation Panel. The current directory listing type will be displayed.

2. In the **Actions** column, click the pencil icon.



3. The following directory listing settings may be updated.
   - **Alternative Display Name (Leave Blank if Same as Contact)** - This is the name of the organization that will be displayed in the directory.
   - **Short Description** - The short description is displayed with the search results.

- **Description** - The description is displayed when the organization is selected from the directory.
- **Keywords** - Keywords are used to search the directory.
- **Highlights (for Directory)** - Provides ability to add additional description of the organization in the directory.
- **Categories** - Select the business categories under which the organization will be displayed in the directory.
- **Images** - Click the **Add** button to add images to be displayed in the directory.



- **VIDEOS** - Click the **+** button and enter a URL for video(s) to be displayed in the directory.

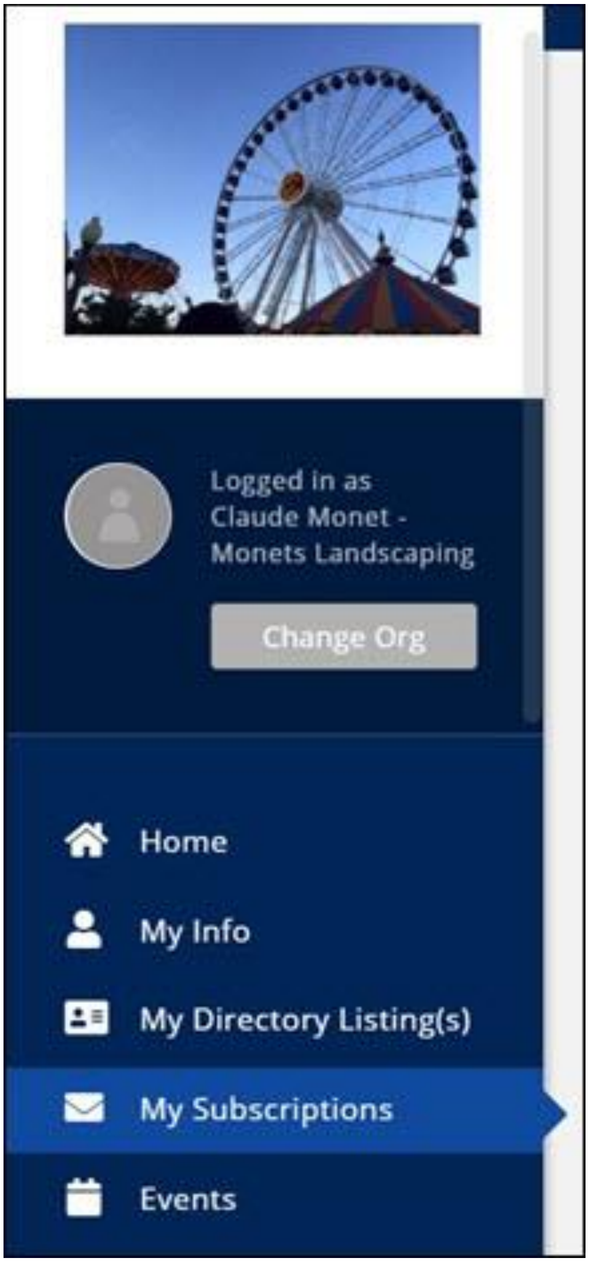
- **Custom Fields** - if you have added custom fields, such as pricing or driving directions, these may also be updated for the directory listing.

4. Click **Done**.

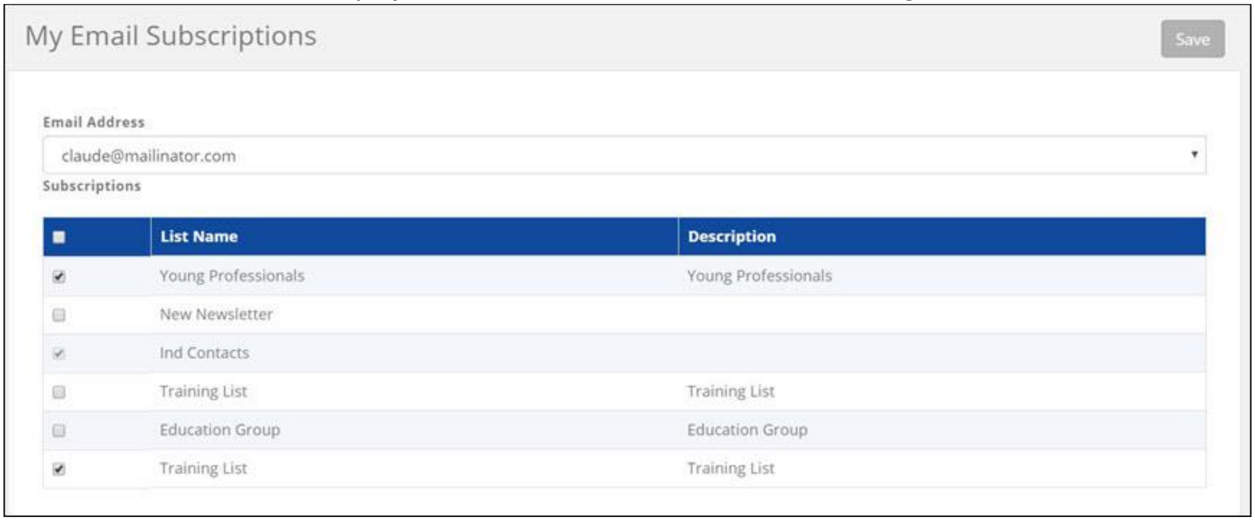
Manage Email Subscriptions

A member may easily subscribe and un-subscribe from the email lists in the Info Hub. Only email list that you have designed as "Users Allowed to View List" and "Users Can Join" are available for subscription/un-subscription.

1. Click **My Subscriptions** in the Navigation Panel.



A list of email lists will be displayed. The lists to which the member belongs will be selected.

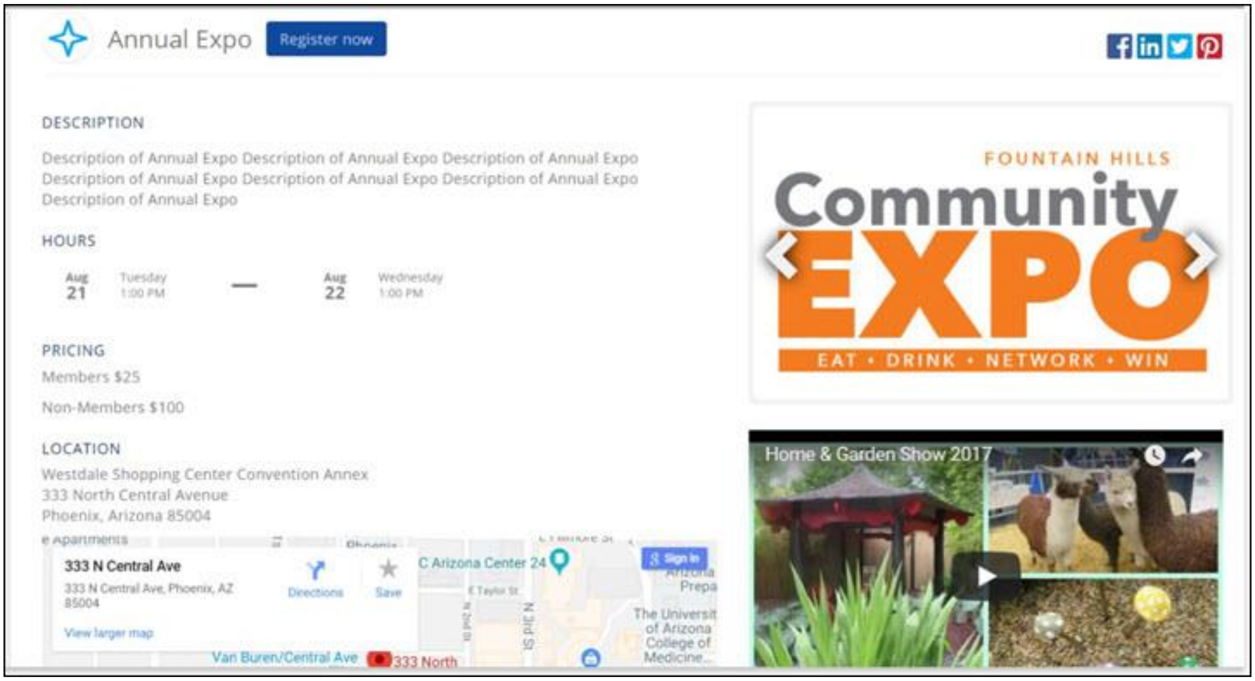


2. Click the check-boxes for the groups you wish to subscribe to **OR** de-select the check-boxes for the groups you wish to un-subscribe from.
3. Click **Save**.

Manage Events in the Info Hub

View Full Event Details

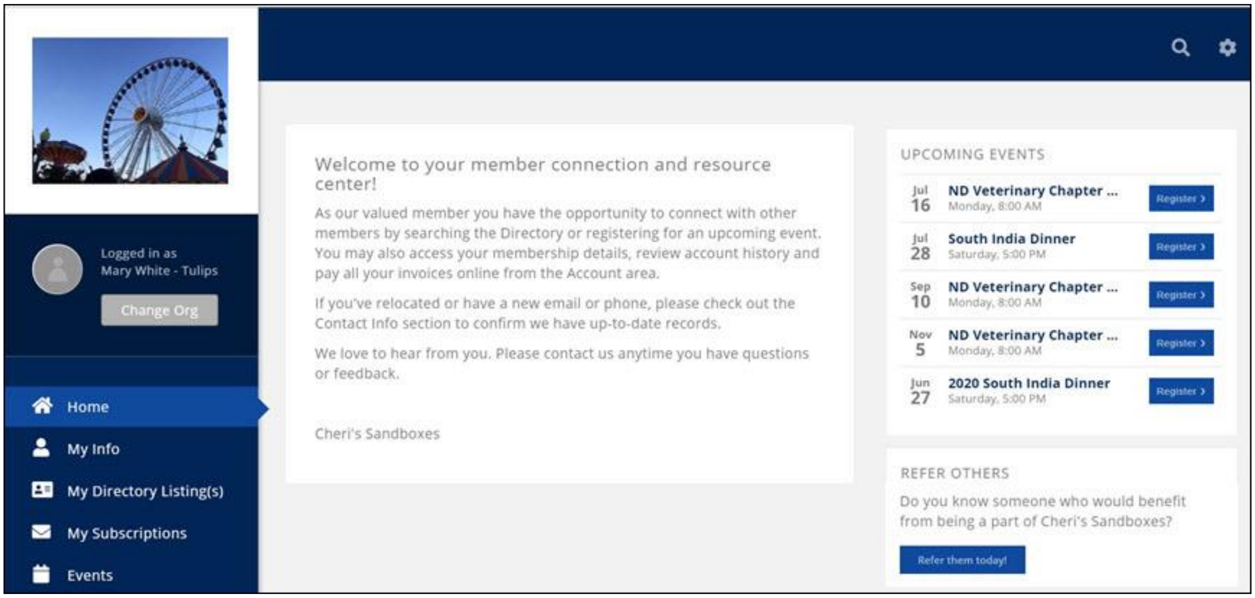
You can view full event details in the Info Hub by either clicking the name of the event in the event list on the right-hand side, or by clicking into **Events** in the left-hand navigation panel, and clicking an event from the calendar. The view of the event is similar to the view that the public will see on your public website.



From the full events detail page, you can click the **Register** button to register for the event. Alternate registration methods are described below.

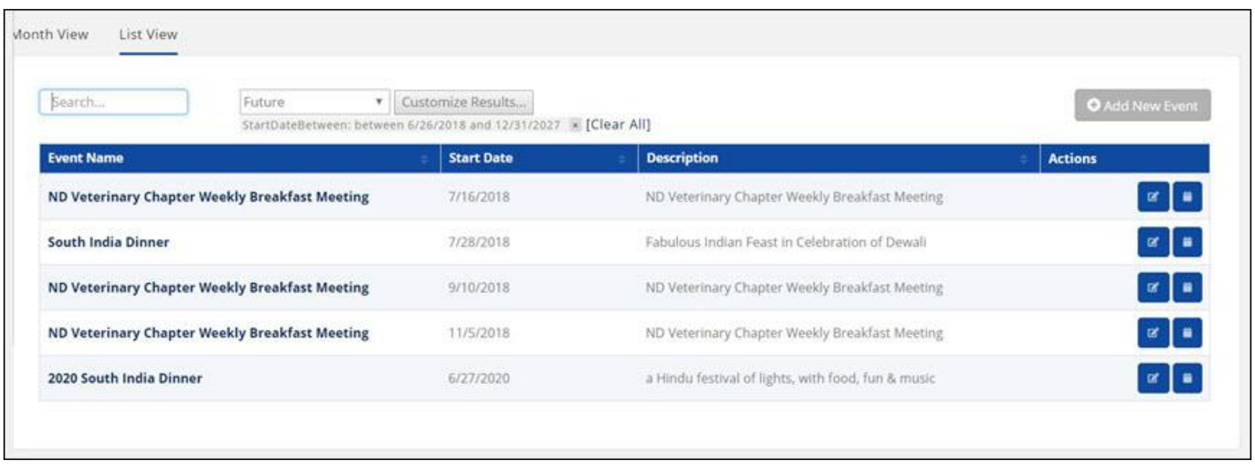
Register for an Event

Upcoming events that have been configured to display in the Info Hub will be shown on the Info Hub **Home** page. If registration is available, simply click the **Register** button to open the event registration page.



Alternately:

1. Click **Events** in the left-hand navigation. The Events Calendar will be displayed in **Month View**, or the user may change the view to **List View**.



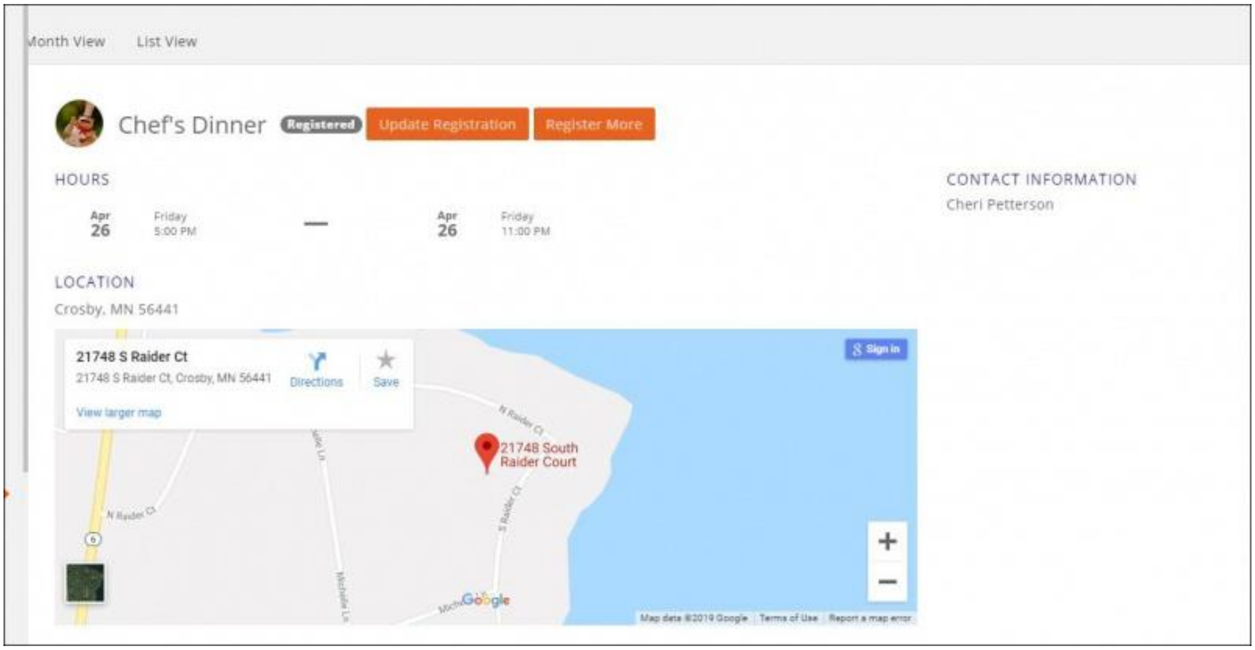
2. Click the event from the list or scroll through the calendar to find and click the desired event. The Event description page will be displayed.

	NOTE: If you have already registered for an event, “**Registered”** will be displayed in all locations where you would be able to register for an event. For Example, below shows the Event list on the main page.

Update Event Registration

Once you have registered for an event, you can easily update registration via the Info Hub. The attendee name may be updated, and additional attendees may be added.

1. In the Info Hub, click the event that you wish to update.

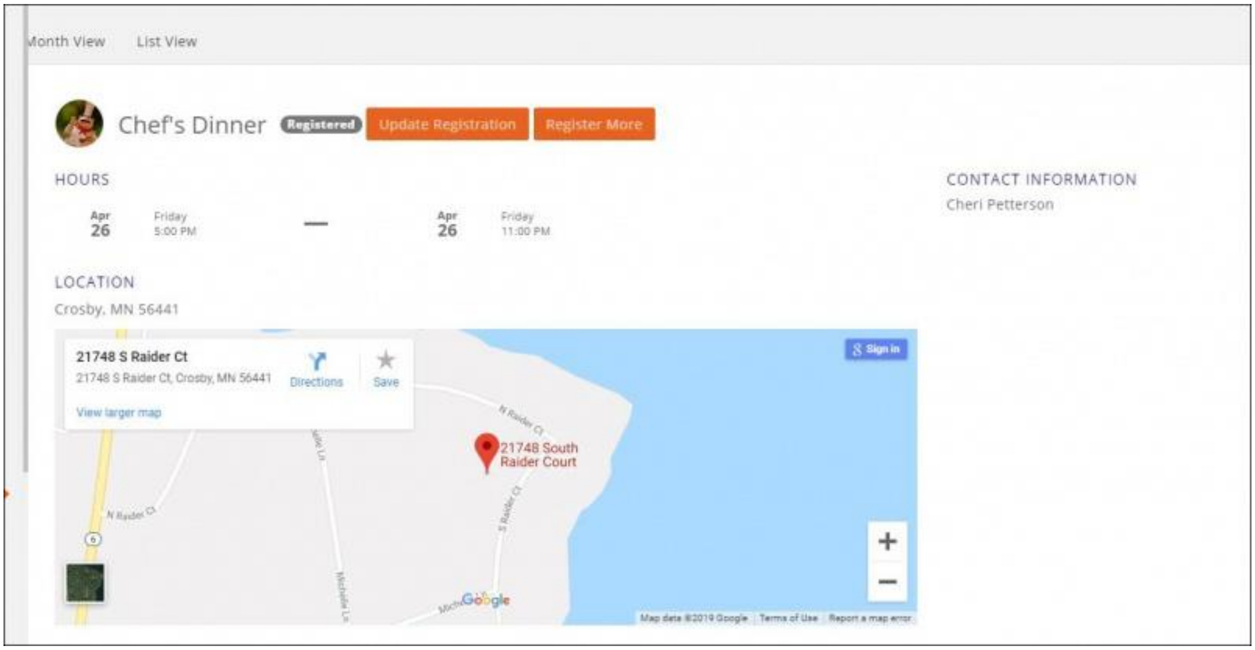


2. Click the **Update Registration** button.
3. Update the registration as desired.
4. If needed, enter Payment Information.
5. Click **Submit**.

Register Additional Attendees

Once you have registered for an event, you can easily register additional attendees via the Info Hub.

1. In the Info Hub, click the event that you wish to update.



2. Click the **Register More** button.
3. Add additional attendee as needed.
4. Enter Payment information.
5. Click **Submit**.

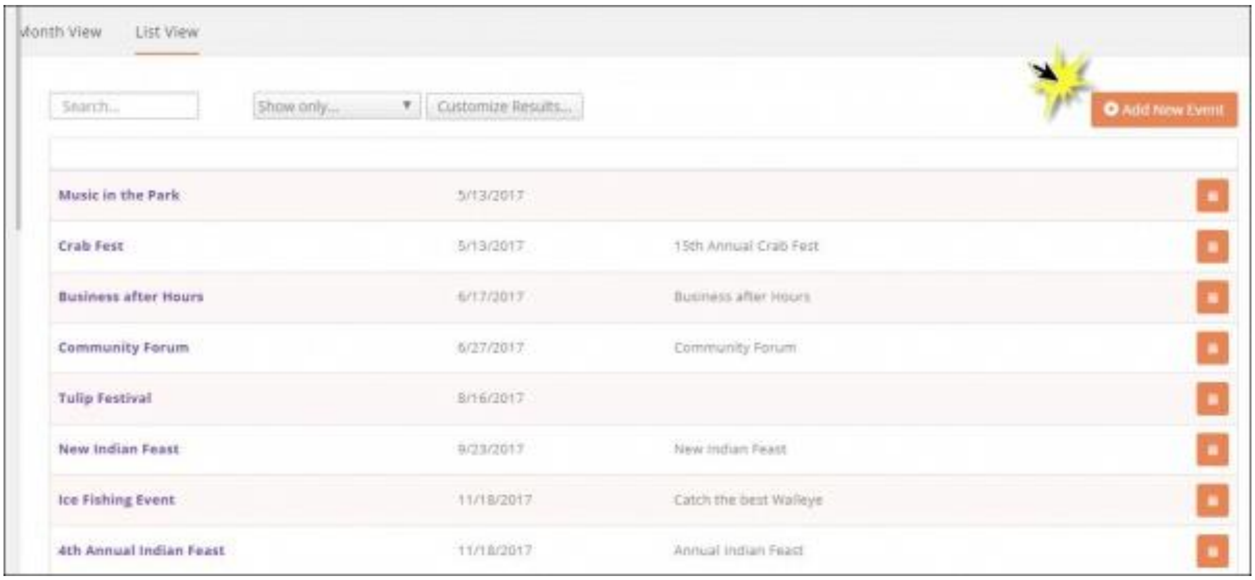
Add an Event

Your members may add event via the Info Hub.

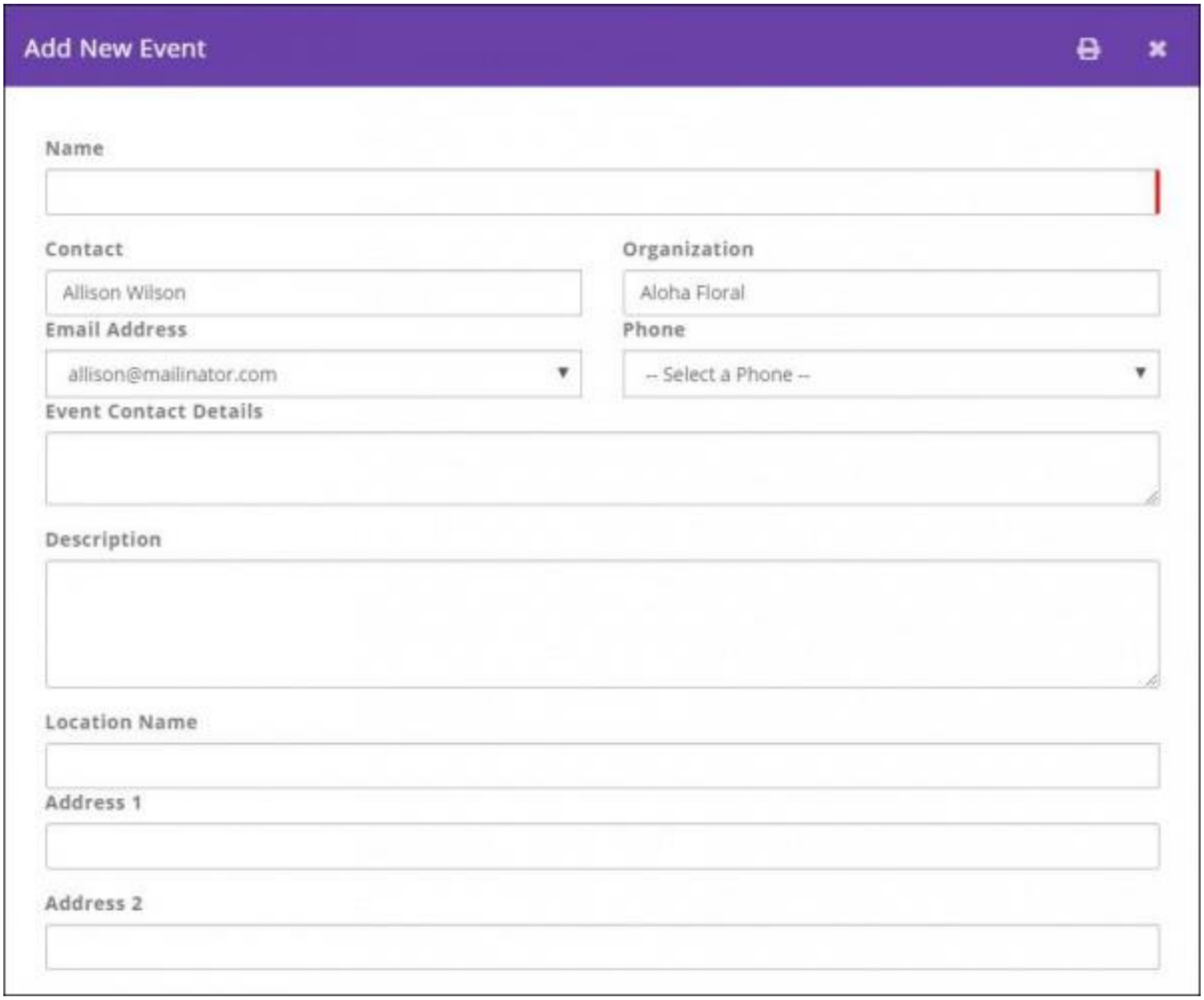
	NOTE: Only users with **Create** or **Full Control** access to events may add events. Users with **Full Control** may add events without approval, and users with **Create** may add events, but the event must be approved by staff. Staff who have subscribed to the **Event Submitted For Approval** will receive a notification that an event has been submitted. See **Configure User Notifications** for details.

Users with **Create** or **Full Control** access may add new events via the Info Hub.

1. Click **Events** in the left-hand navigation panel.



2. Click the **Add New Event** button.



- **Name** - Enter a name for the event. This is the name that will display on your website.
- **Contact** - Enter the contact person for the event.
- **Description** - Provide a description of the event. This description will be displayed on your website.
- **Location** - Enter location information. This information will be displayed on your website.
- **Publish Date** - Enter the date that you wish to begin displaying this event on your website.
- **Start At/End At** - This is the start time and end time of the event.
- **Time/Hours Details** - This section allows you to enter descriptive information about the time/hours of the event (such as when registration opens, when dinner starts, when auction starts).
- **Organization** - The name of your chamber/association will be automatically populated. You may change this to associate this event to a different organization.
- **Email Address**- email address you want displayed on the event page
- **Phone**- phone number you want displayed on the event page

- **Additional Contact Details** - This text box allows you to enter further contact information, i.e. name, phone number, email, etc.
- **Category** - To assist you in filtering, sorting and/or report on this event, you may select a category from the drop-down list. This is optional. **Click here** for further information on setting up Categories.
- **Calendar** - Select the calendar(s) on which you want to display this event. The event may be displayed on multiple calendars.
- **Published Status** - Select the status of this event, only approved events will be displayed on the calendars you have selected.
- **Enable Registration** - Select this checkbox to allow registration for this event. If this is not selected, a registration button will not be displayed on your website, however, your staff members would be able to register people from the back-office.

3. Click **Save** to save the new event.

If the user has Full Control in the Info Hub, the event is automatically approved. If the user has Create access to events in the Info Hub, staff who have subscribed to the **Event Submitted For Approval** notification will receive an email, and will have the ability to review and approve (or decline) the event. See **Approve Events Submitted by Members** for instructions on approving events.

Add/View Resources

Via the Info Hub, you and your members can easily share resources. Your members will also be able to upload files to a **My Files** folder that would only be visible to that member, but also attached to the member's files tab in the back office. Members may add files, images, videos, etc.

View Resources

Members must have **View** access to the Info Hub to see available resources. Additionally, if resources have been limited to particular groups (optional), the members will only see the resources if they belong to the group.

1. Click **Resources** in the left-hand navigation panel.

The resources may be viewed in a card or list view. Displayed for each resource: Name, Category, Lists/Committees shared with, and Date Added. By dwelling the mouse over a resource, description of the resource is displayed.

2. Click the desired resource to view it.

The list of resources may be filtered by clicking the **Customize Results** option, and selecting from the following filters:

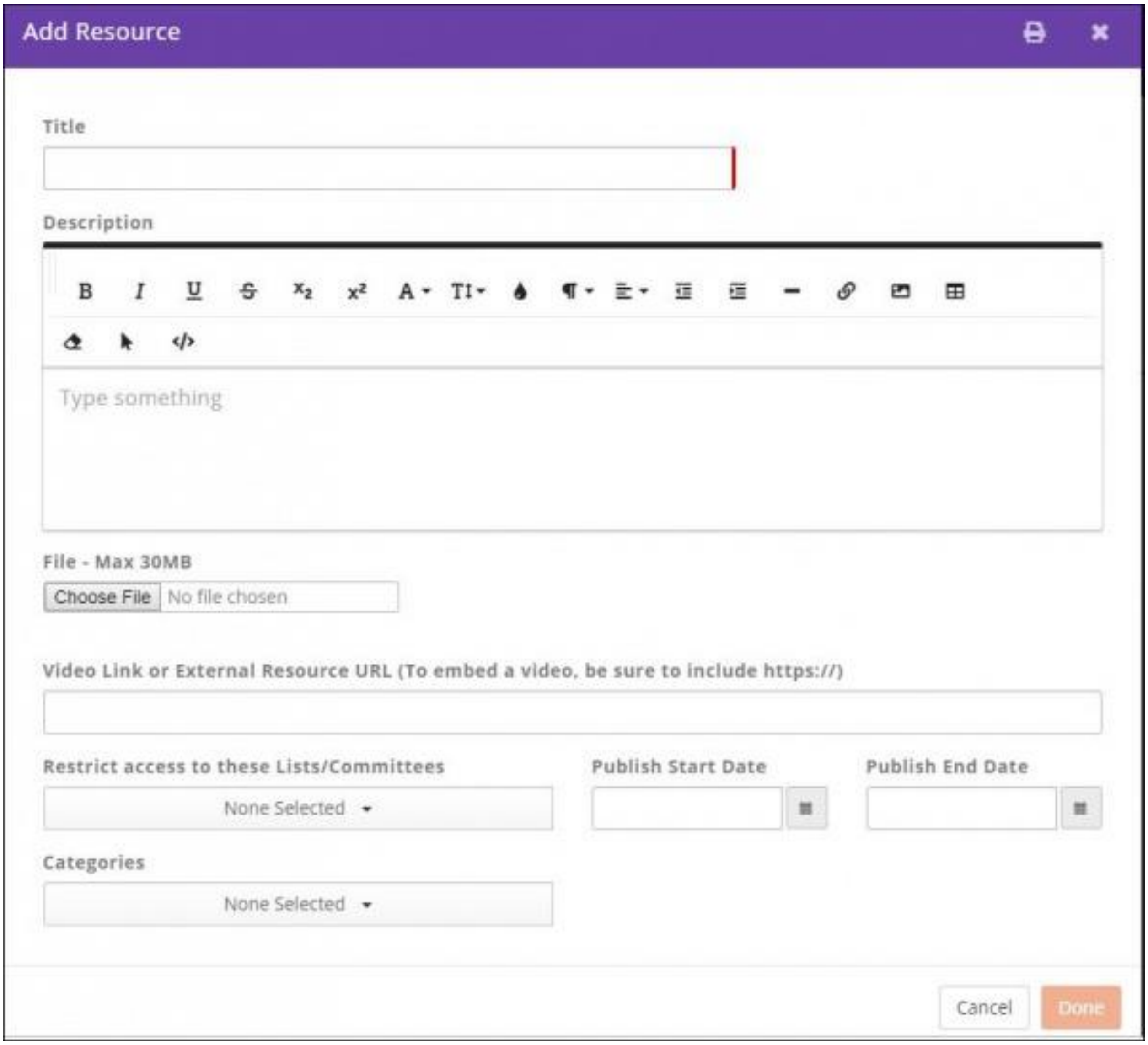
- **Resource Type**
- **Date Added**
- **Lists/Committees**
- **Category**

Add Shared Resources

Members must have **Create** access to Resources in the Info Hub to add resources. Standard word/pdf documents, as well as .jpg, .png and videos may be added to resources. Executable files(.exe, .msi) may not be added to resources.

1. Click **Resources** in the left-hand navigation panel.

2. On the **Resources** tab, click the **Add** button.



3. Provide a **Title** for the resource. The title will be displayed in the list of resources, and provide an understanding of the purpose of the resource.
4. Provide a **Description** of the resource. The description is displayed when the mouse is dwelled over the title of the resource.
5. Click the **Choose File** button to navigate to the desired file, or enter the URL in the **Video Link or External Resource URL (To embed a video, be sure to include https://)** box.
6. (Optional) **Restrict access to these Lists/Committees**: If you wish to limit access to the resource to certain group(s), select the desired groups.
7. **Publish Start Date**/**Publish End Date**: If populated, the resource should only display for others in the hub after the start date and before the end date. The resource will always remain for original uploader regardless of publish dates.
8. (Optional) If categories for resources have been defined, select the desired category from the drop-down list.

Add Resources Viewable by the Member and Staff Only

On the **My Files** tab within **Resources** members may upload files that are only visible to them, and the association staff. Once uploaded to **My Files**, the documents will also be displayed in the back-office, on the member's **Files** tab.

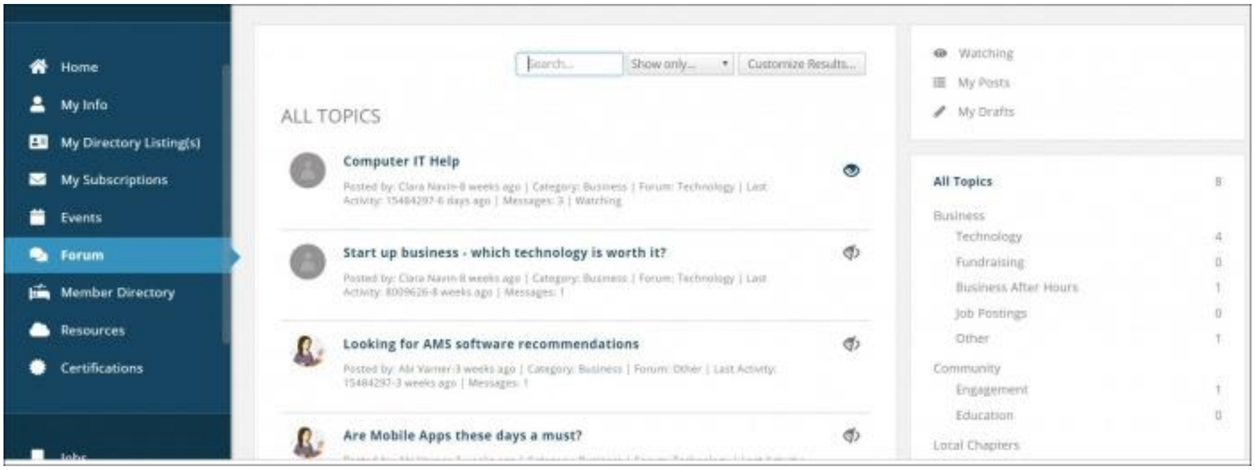
1. Click **Resources** in the left-hand navigation panel.

2. On the **My Files** tab, click **Choose Files** to navigate to, and upload the desired document.

	NOTE: Files uploaded from the back-office, on the user's **Files** tab will also be displayed on the **My Files** tab in the Info Hub.

Member Participation in the Forum

A link to the Forum is displayed in the left-side navigation.



The Forum page is divided into three distinct sections:

Main Section

When a member first accesses the Forum, the main section will be populated with all topics, ordered by newest first. Within the main section members will be able to:

- See topics listed in order of activity (most active is on top)
- Click on a Topic title to see topic details/comments etc., like topics, and respond to topics.
- Click the eyeball icon on any topic to watch that topic. If a member is watching a topic, the eyeball icon will go from gray to the primary color set for the Info Hub. The member will receive email notifications of updates made to a topic. **NOTE**: If watching a topic, you will receive notifications, per your contact preferences.
- Add new posts

The following information is displayed for topics:

- The Forum
- The Forum Category
- Who posted and when it was posted.
- The image of the person who posted. The image is the image that the member has uploaded to their profile in the Info Hub. A gray circle will be displayed if an image is not found.
- The Last activity, who and when posted

Filtering options in the main section allow for filtering to a specific date range, author, category, etc.

Top Right Section In the top right section of the Forum, members will find ways to refresh the information shown in the main section:

- **Watching**: Clicking this option will refresh the main section to display only those topics the member is watching. See all items that they are watching.
- **My Posts**: Clicking this option will refresh the main section to only display the member's own posts. See just their own posts
- **My Drafts**: Clicking this option will refresh the main section to only display the member's drafts.

Bottom Right Section

In the bottom right section of the Forum, a list of all categories and associated forums is displayed. For each Forum, the number of topics associated to that forum is also displayed. By clicking on a category or forum, the main section will be updated with just those specific items.

All Topics	8
Business	
Technology	4
Fundraising	0
Business After Hours	1
Job Postings	0
Other	1
Community	
Engagement	1
Education	0
Local Chapters	
North Chapter	0
South Chapter	1

Searching & Filtering the Forum

A variety of ways are available for searching and customizing the results displayed in the main section of the Forum.

- In the Main Section:
    - Type in the name of a forum/topic in the search-box.
    - Select a **Show Only** option from the drop-down list. This option will allow you to filter by: My Watched Posts, Watched Posts, My Drafts, Activity (Last Day, Last Week, Last Month), or by selecting a specific Forum.
    - Click the **Customize Results** button to filter by: Category, Author or Date Range.
- In the top right section:
    - Click **Watching** to filter the main section to just those forums/topics the user is watching.
    - Click **My Posts** to filter the main section to just the user's posts.
    - Click **My Drafts** to filter the main section to just the user's drafts.
- In the bottom right section:
    - Click **All Topics** to view all topics in the main section.
        - Click a specific category to view all the forums in that category.
    - Click a specific forum to view all topics in that forum. A number next to the forum will indicate the number of topics in the forum.

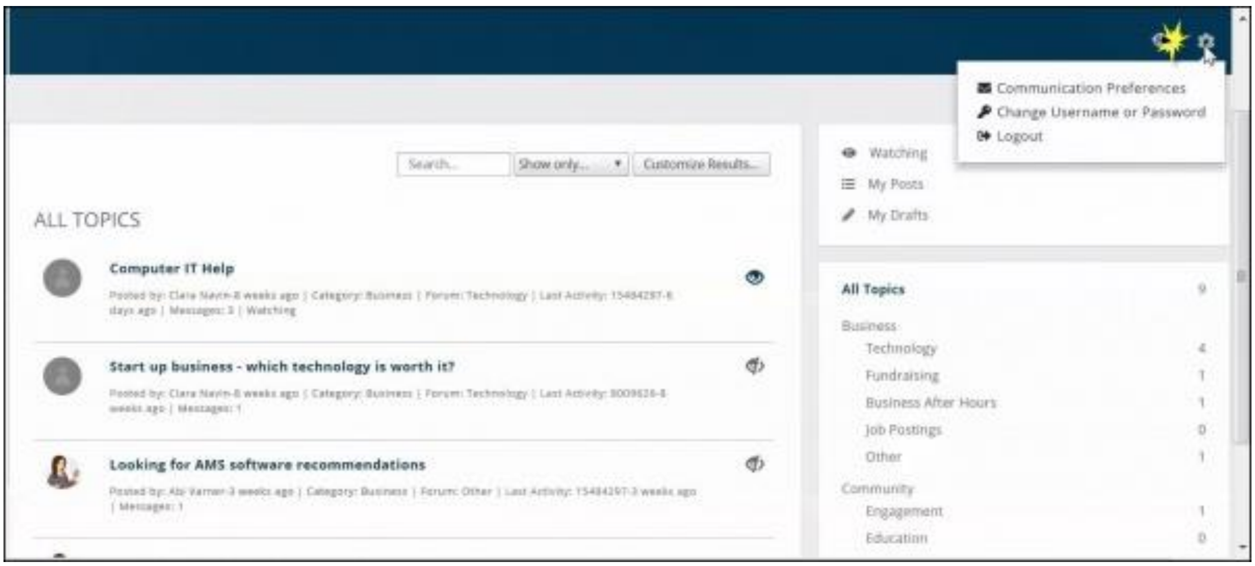
Watch Topics/Forums

Members may choose to watch certain forums and/or topics to stay on top of new information added to the forum. A notification process will automatically send emails to the user based on personalized Forum Notification preferences.

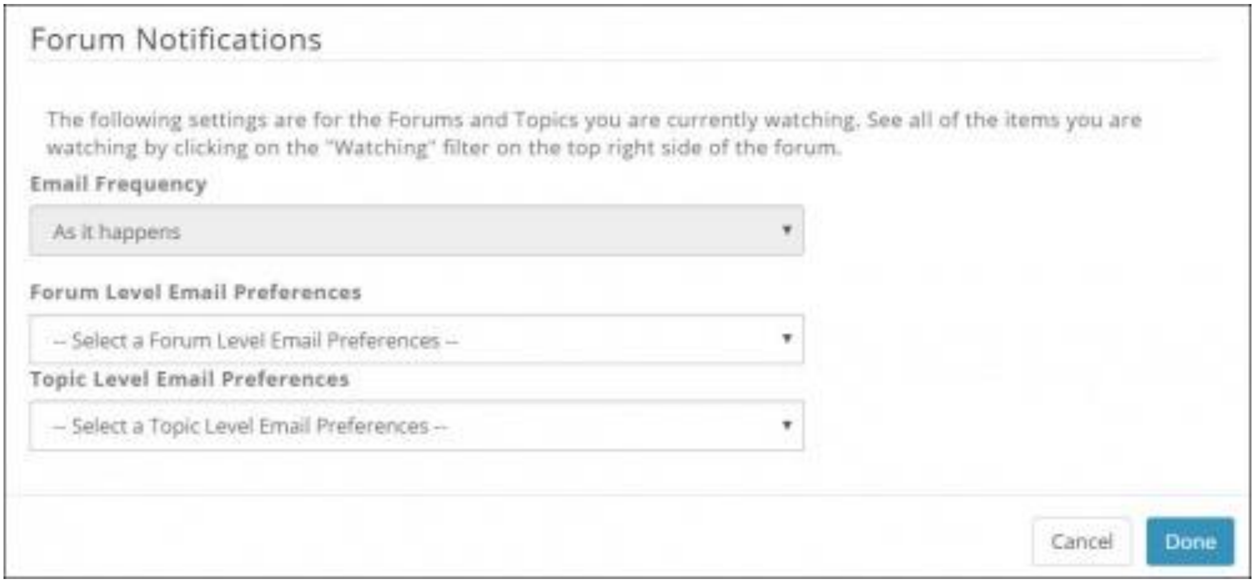
Set Preferences for Forum Notifications

Forum Notifications allow the user to configure when they would like to receive email notification about changes to the forums or topics that they are watching.

1. Click the  in the header bar.



2. Click **Communication Preferences**.

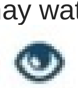


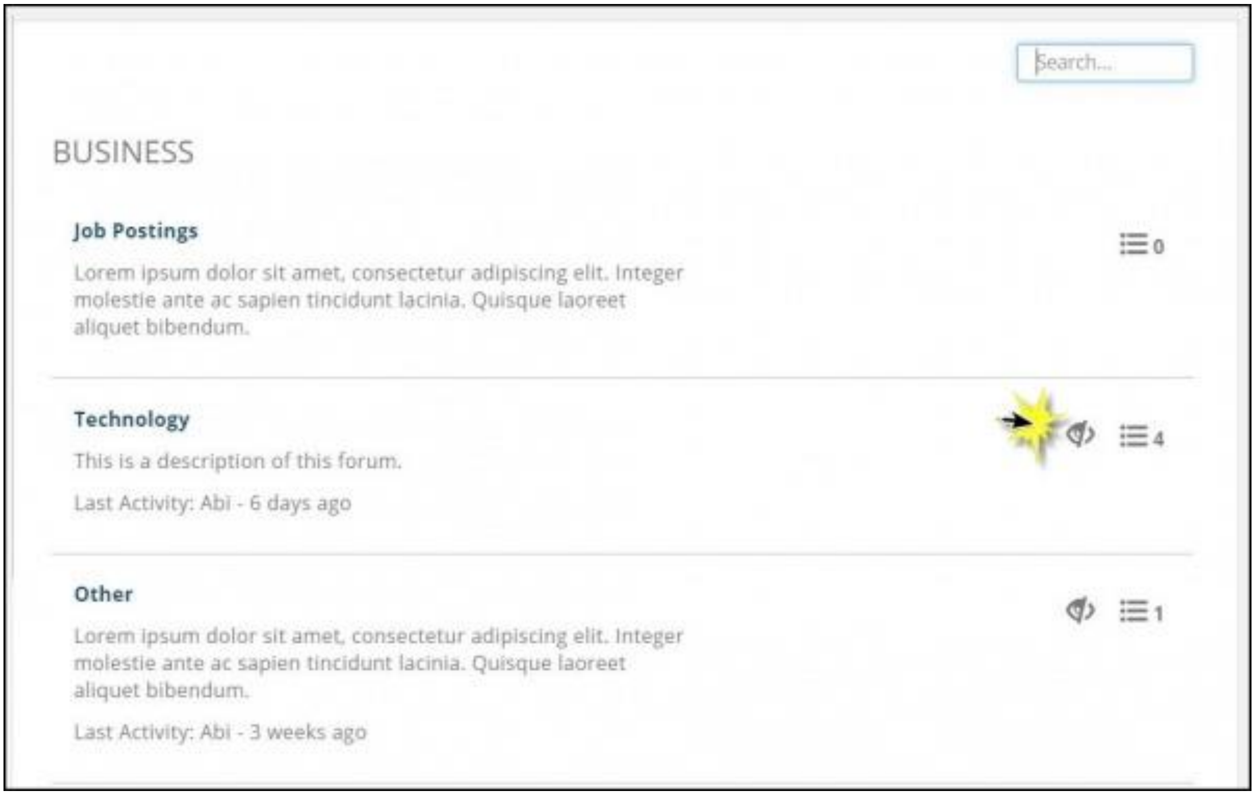
3. In the **Forum Notifications** section, configure desired settings:
    - **Email Frequency**: This option is set to **As it Happens**. An email notification is sent immediately when a change is made to forum/topic the user is watching, based on the settings below.
    - **Forum Level Email Preferences**: Select preferences for changes to forums.

- **None**: If this option is selected, no notification will be sent.
- **Watched Forums**: If this option is selected, an email notification will be sent when a new topic is posted to the forum, a comment is posted to a topic in that forum, or a reply has been made on a comment that has been posted to a topic in that forum.
- **Watch Added Topic Only**: If this option is selected, a notification will only be sent when a new topic is added to the forum.
    - **Topic Level Email Preferences**: Select preferences for changes to forums.
    - **None**: If this option is selected, no notification will be sent.
    - **Watch All**: If this option is selected, an email notification will be sent when a comment is posted to the topic or a reply has been made to a comment that has been posted to that topic.
    - **Watch Replies to My Comments Only**: If this option is selected notifications will only be sent when replies are made to comments the user has posted.

4. Click **Done**

Watch Forums

Members may watch specific forums, by clicking the  icon. Forums that are watched will display the  icon.

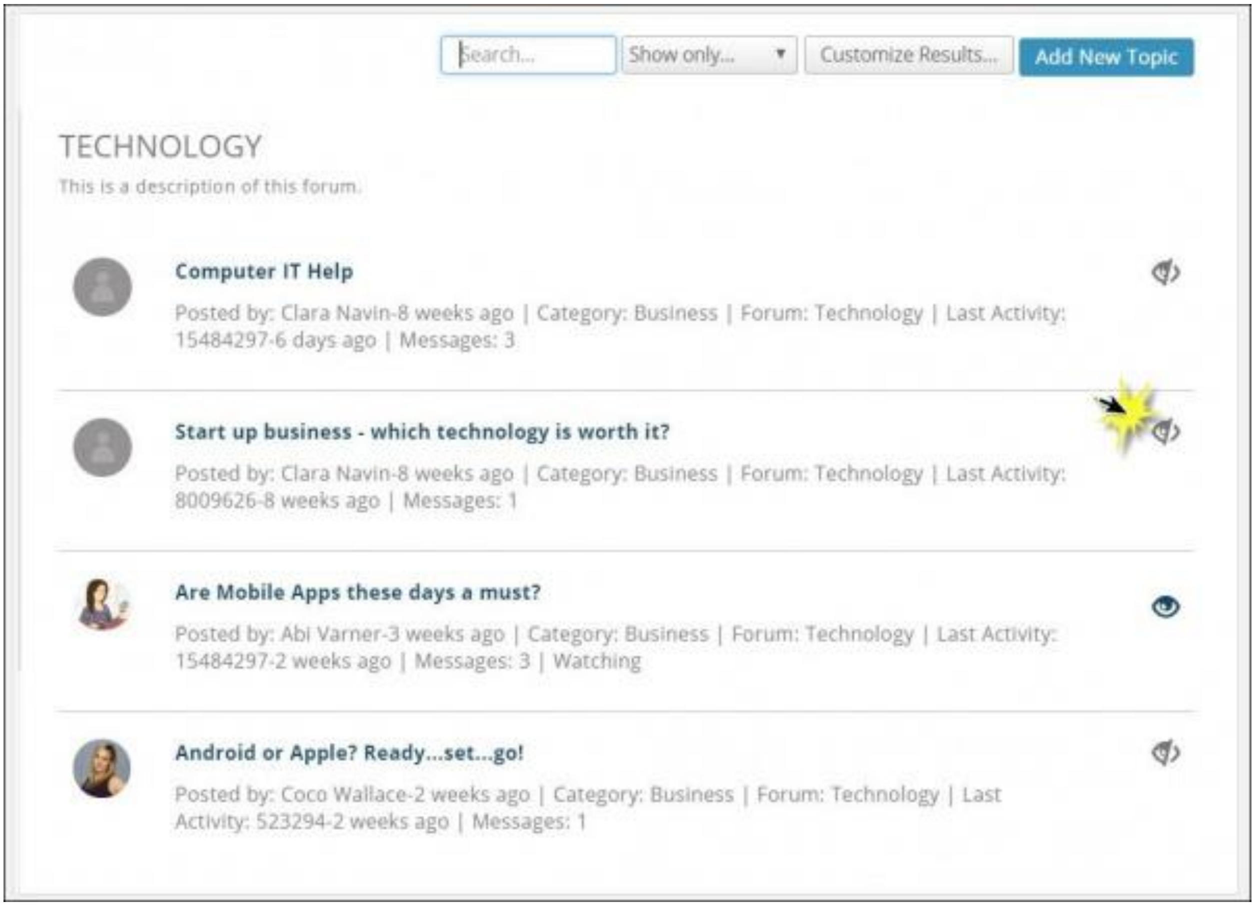


Once the member is watching a forum, automatic notifications will be sent to them when:

- A new topic is posted to a forum
- A comment is posted to a topic in that forum
- A reply has been made on a comment that has been posted to a topic in that forum

The notifications are sent based on the member's contact preferences.

Members may watch specific topics, by clicking the  icon. Topics that are watched will display the  icon.



Once the member is watching a topic, automatic notifications will be sent to them when:

- A comment is posted to the topic
- A reply has been made to a comment that has been posted to that topic

The notifications are sent based on the member's contact preferences.

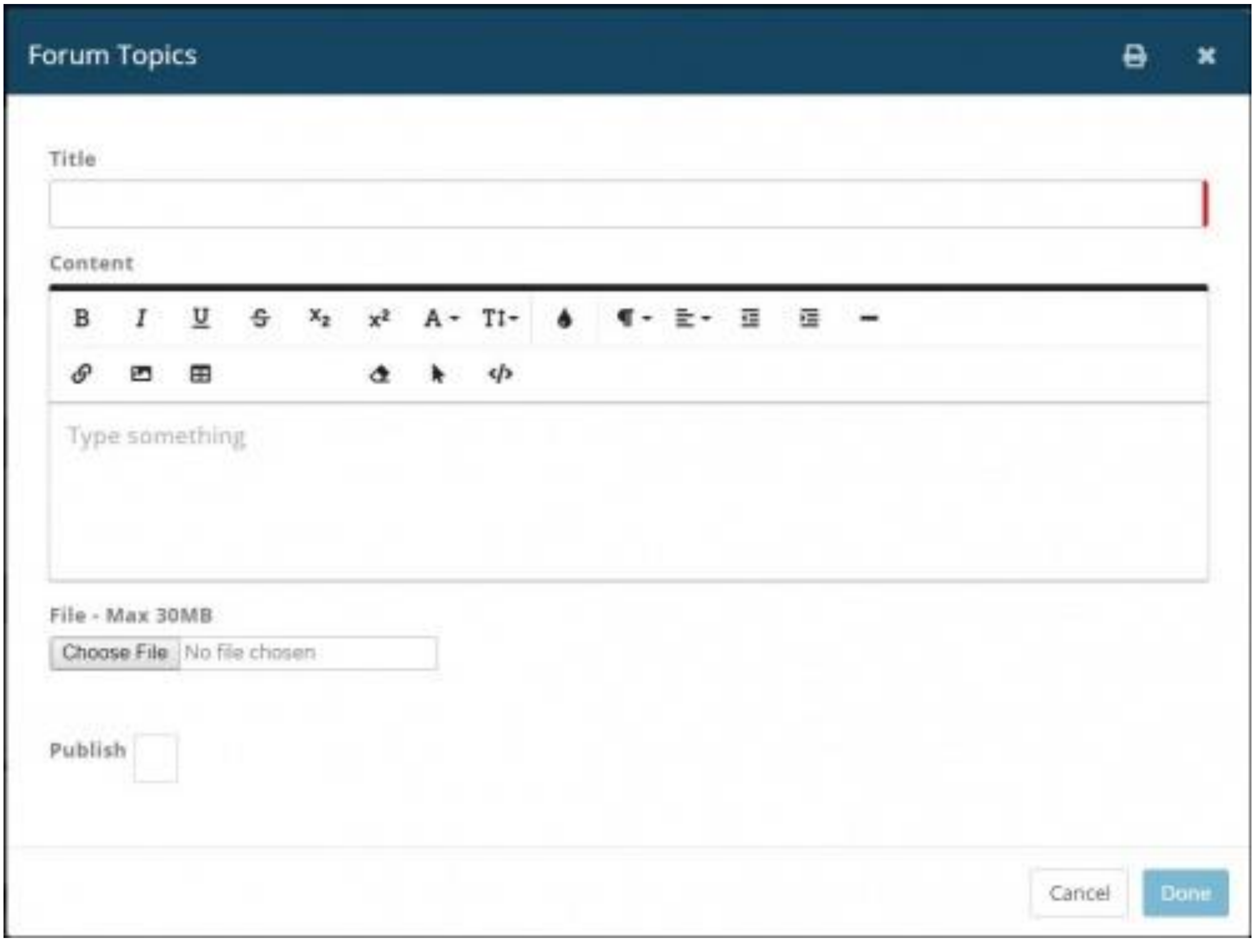
Working with Topics in the Forum

You have the opportunity to view all topics in a forum, add topics to a forum, comment on topics, and reply to comments.

Add Topics to a Forum

You may add topics to any of the forums they have access to. **NOTE**: The user must be within a Forum in order for the **Add a New Topic** button to be displayed.

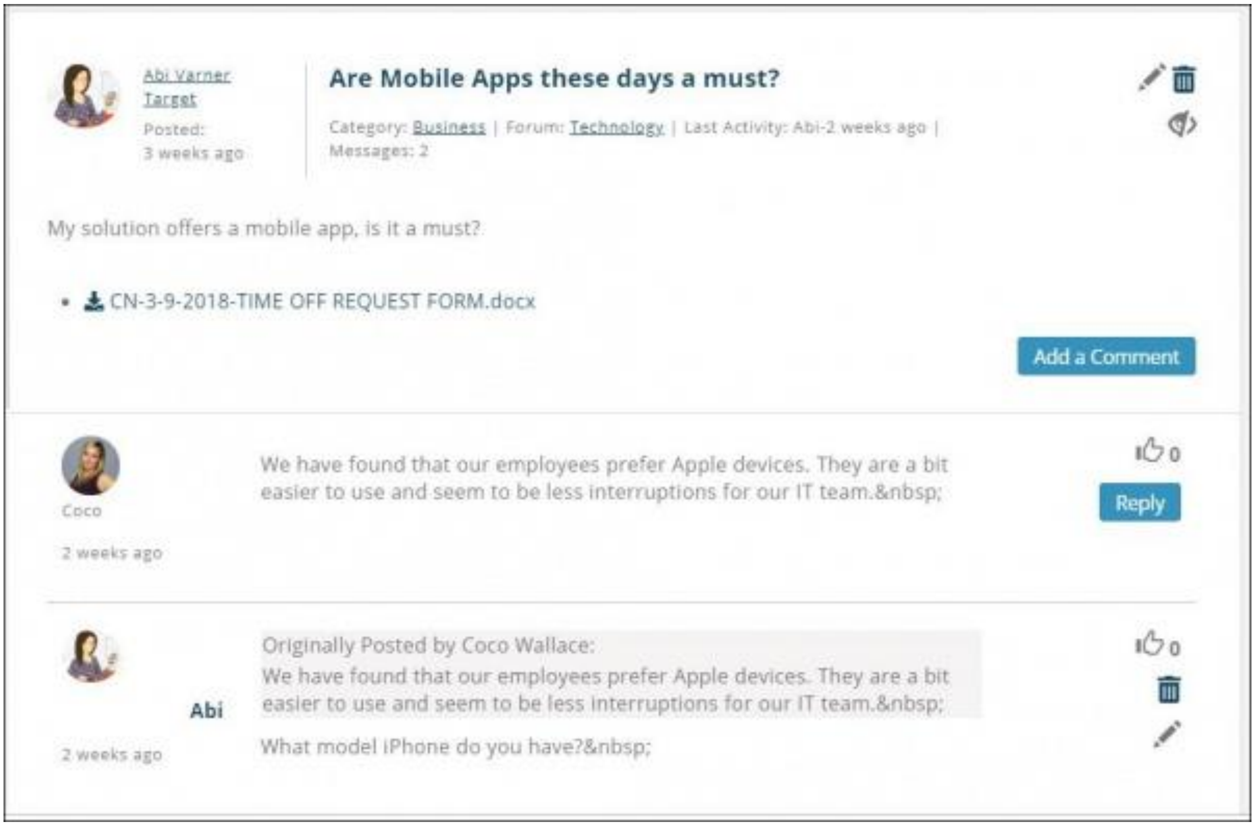
1. Within the desired Forum, click the **Add a New Topic** button.



2. Configure the following:
   - **Title**: Provide a title for the topic. This should reflect the idea, concept, or question the topic is about.
   - **Content**: The content will be displayed underneath the title and provides further details.
   - **Choose File**: Select this option to upload a file to the topic.
3. Click **Publish** to post the topic immediately and click **Done**. To save this as a draft, simply click **Done**. Drafts may be accessed for further editing and publishing by clicking **My Drafts** in the top right section.

Comment on Topics

1. Click the title of the topic to view the topic and previous comments.

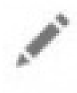


2. Click the **Add Comment** button.

3. Type in desired comment.
4. Click **Done**.

Edit a Comment

Only the original author of a comment may edit a comment.

1. Click the title of the topic to view the topic and previous comments.
2. Click the  icon for the comment you wish to edit.
3. Make the desired edits to your comment.
4. Click **Done**.

Delete a Comment

Only the original author of a comment, and the moderator of a forum, may delete comments.

1. Click the title of the topic to view the topic and previous comments.
2. Click the  icon for the comment you wish to delete.

Like a Comment

1. Click the title of the topic to view the topic and previous comments.
2. Click the  for the comment you wish to like.

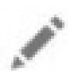
Reply to a Comment

1. Click the title of the topic to view the topic and previous comments.
2. Click the **Reply** for the comment you wish to reply to.

3. Enter your reply
4. Click **Done**.

Edit a Reply

Only the original author may edit a reply.

1. Click the  icon for the reply you wish to edit.
2. Make the desired edits to your reply.
3. Click **Done**.

Delete a Reply

Only the original author of a reply, and the moderator of a forum, may delete replies.

1. Click the title of the topic to view the topic and previous comments.
2. Click the  icon for the reply you wish to delete.