



# Partner Portal User Manual



# Table of Contents

<b>Content</b>	<b>Page Number</b>
Filters and Data Grids	1
Login Screen	2
Home Screen	3
Manage Profile	
• Accounts	6
• Contacts	7
• My Benefits	8
Collateral	
• Listings	9
• Special Offers	10
• Calendar of Events	11
• Media	13
• Materials Request	14
Opportunities	
• RFPs	15
• Media Leads	18
• Service Requests	19

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# Filters and Grids

Before we explore the extranet in depth, please note that you have the ability to customize some settings in the extranet for your own unique experience.

- **Filters** – On many pages of the extranet, you will see a Filters section. This section allows you to narrow down the results on the page. Below is an example of the RFPs filter page. Once you have entered your filters, click the Apply Filters button to see your results. To customize this page, click the Manage Filters option in the top right corner.

## RFPs

**Filters (1)** [Manage Filters](#)

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

Response Date:




Create Date:

Organization contains:

Status is one of:

**APPLY FILTERS** **CLEAR FILTERS**

- **Data Grids** - When viewing pages with filter options, just below the filters section is a data grid. A data grid displays a list of records matching the criteria you specified in the filters. You can update your default column heading in data grids by clicking the Sprocket icon in the top right corner of the data grid.

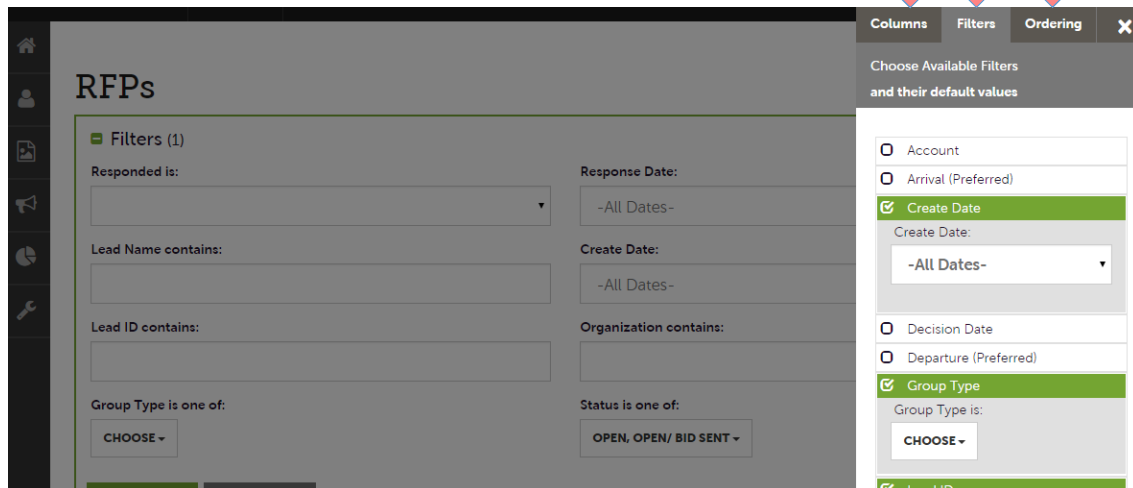
Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending	
  	20% Off Rooms Sunday Thursday	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

Page 1 of 1 Go to Page: 1

Within each data grid you may see several icons to the left of each record depending upon the page you are viewing. These icons are:

1. **Pencil** – edit the record
2. **Eyeball** – view the record
3. **Clone** – duplicate the record
4. **Add Button** - Depending on the page, you may see an Add button to the top left of the data grid. When this option is available, click the button to add a new record.

## Filters and Grids (cont'd)



**RFPs**

**Filters (1)**

Responded is: [Dropdown]

Lead Name contains: [Text Box]

Lead ID contains: [Text Box]

Group Type is one of: [CHOOSE]

Response Date: [All Dates]

Create Date: [All Dates]

Organization contains: [Text Box]

Status is one of: [OPEN, OPEN/ BID SENT]

**Columns** **Filters** **Ordering** [X]

Choose Available Filters and their default values

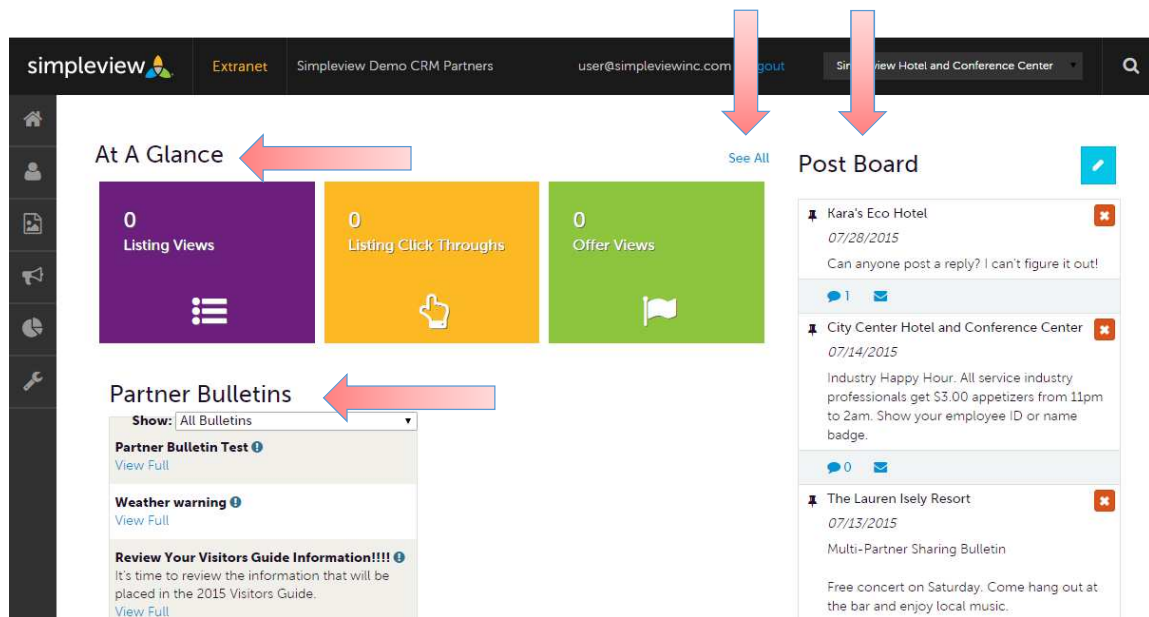
- ☐ Account
- ☐ Arrival (Preferred)
- ☒ Create Date
  - Create Date: [All Dates]
- ☐ Decision Date
- ☐ Departure (Preferred)
- ☒ Group Type
  - Group Type is: [CHOOSE]
- ☒ Lead ID

You can customize your filters and data grids as you prefer. When clicking on settings options, you will see a menu on the right, where you can personalize your filters, data grid columns, and ordering.



If you are new extranet user, use the username (your email address) and password provided in the email sent to you from [kquant@albany.org](mailto:kquant@albany.org). You will immediately be prompted to enter a new password. If you ever forgot your password, click on **Forgot Password?** and a new changeable password will be emailed to you.

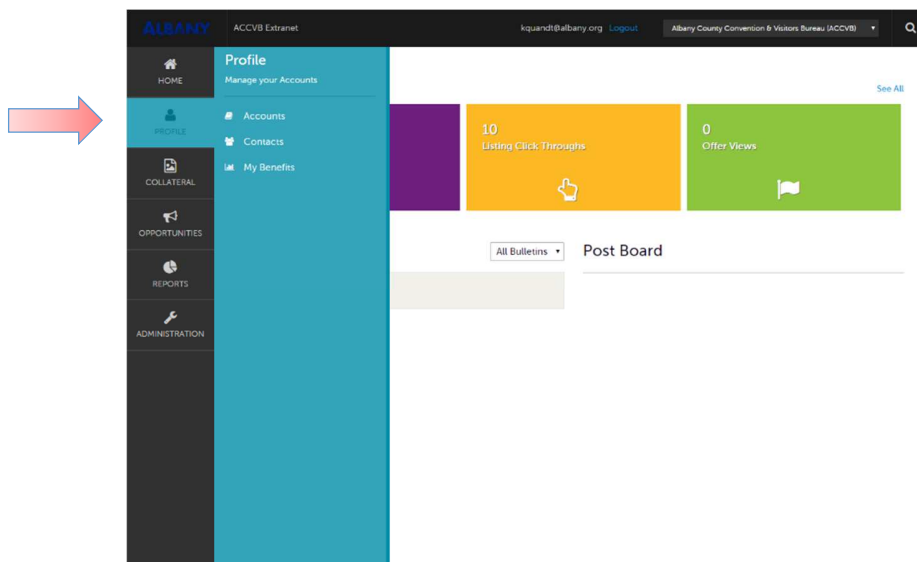
# Home Screen



**At A Glance** is a brief view of your listing and special offers tracking. You can also click the **See All** link to the right to view more information about your interaction with the ACCVB.

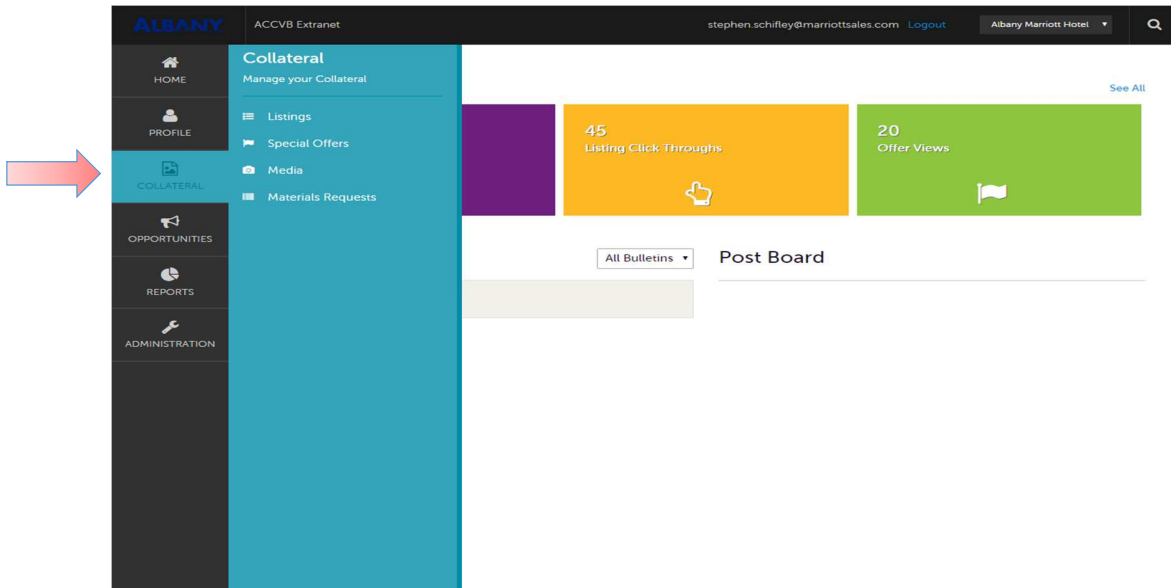
**Post Board** allows you to communicate with other ACCVB Partners. By clicking on the caption bubble icon, you can reply to a post. You can also email the poster by clicking the mail icon.

**Partner Bulletins** are important notices, documentation, events, etc. Important bulletins will be marked with a blue and white exclamation mark.



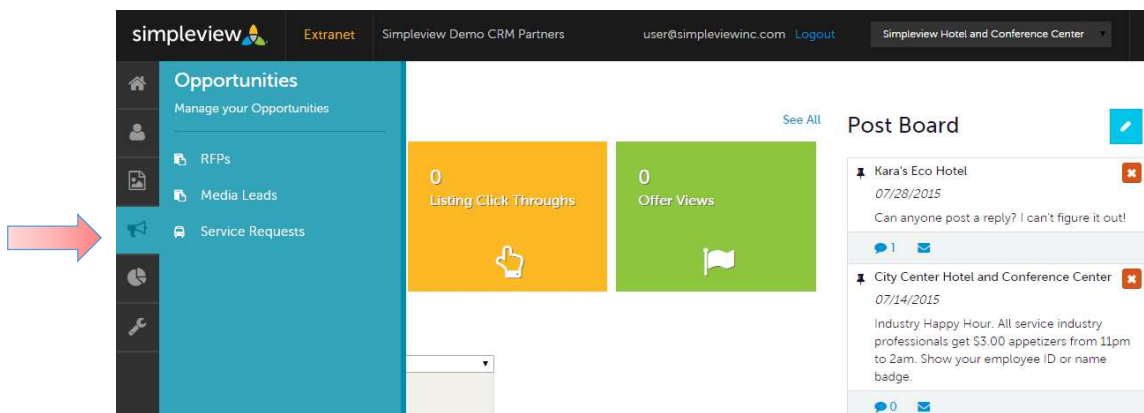
By clicking the **Profile** icon, you can view/edit your account information, contacts associated with your account, and view information about your interaction with the ACCVB (same as the See All link in the **At A Glance** section on the Home page). Detailed information on how to edit account information begins on page 6.

## Home Screen (cont'd)



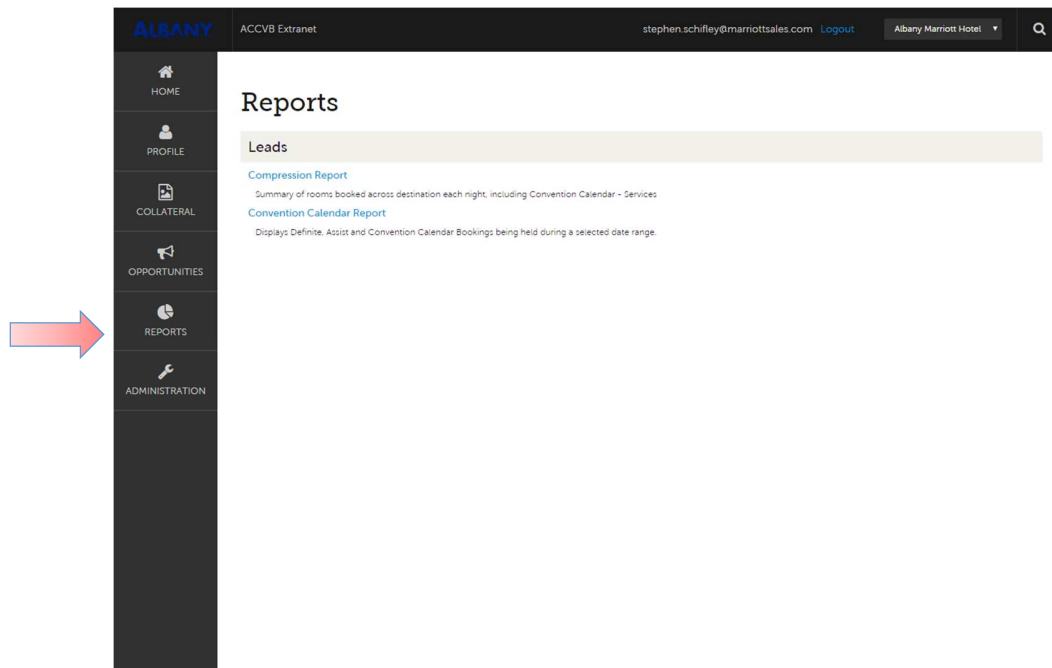
By clicking the **Collateral** icon, you can view, edit, and add listings, special offers, events, and media (i.e. images). You can also request Albany Visitors Guides.

**Note:** Some of these options are just view and/or edit and/or add. Details on these options begin on page 9.



By clicking the **Opportunities** icon, you can view and respond to RFP's sent to you by Discover Albany. Opportunities are broken down into RFP's (meeting and tour leads), Media Leads (travel writer RFP's), and Service Requests (non-room specific RFP's). Details on these options begin on page 15.

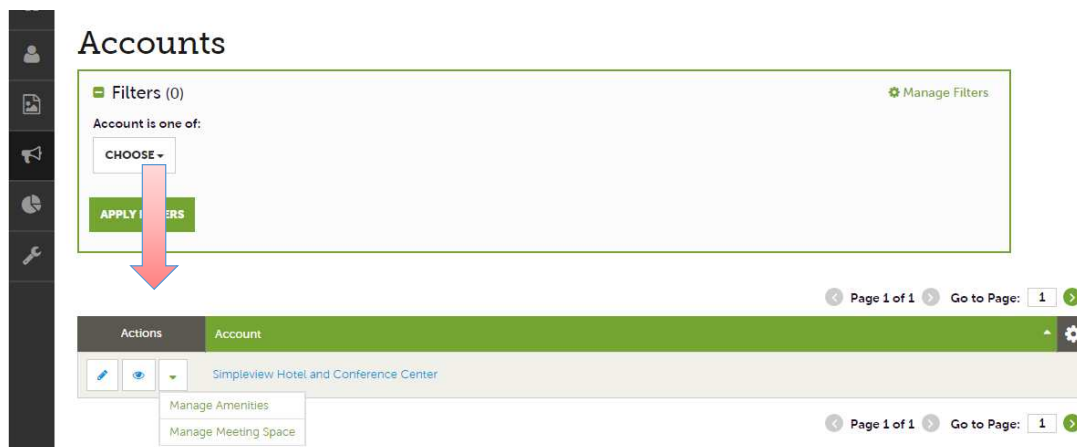
# Home Screen (cont'd)



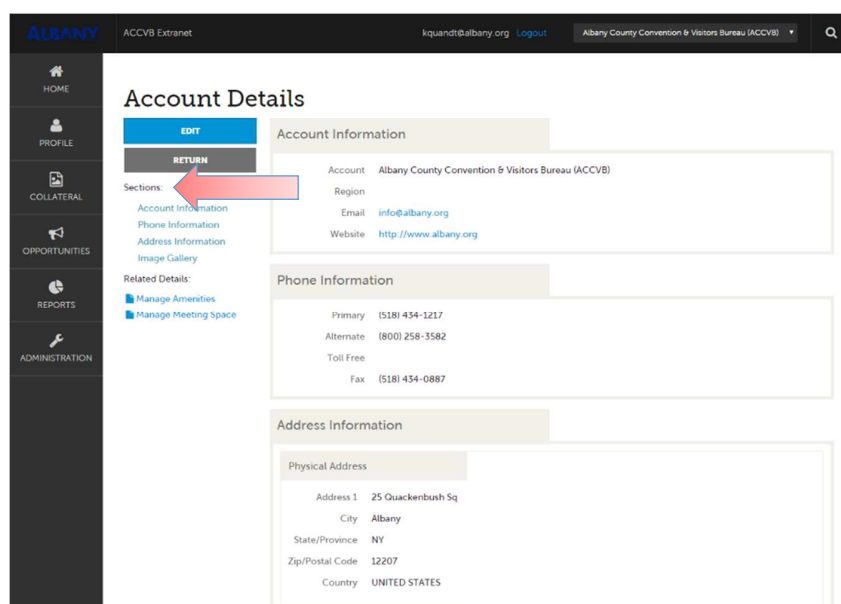
By clicking the **Reports** icon, you can view reports Discover Albany has posted. To view a report, just click the name of the report.



# Manage Profiles - Accounts



After you click the **Profile** icon and then **Accounts**, you will see your account name and various actions you can perform. If you see multiple account names, this is due to your account being associated with another account. The pencil icon will allow you to edit your account information. By clicking the eyeball icon, you can view your account information. The down arrow icon will allow you to view and edit your amenity and meeting space information.



When you view or edit your account information, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing the account, the button in the top left will say Edit. If you are editing the account, the top left button will say Save. You must click the Save button before any of your changes are actually saved!



# Manage Profiles - Contacts

**Contacts**

Filters (0) [Manage Filters](#)

Account is one of:  Contact Type is:

Page 1 of 1 Go to Page:

Actions	Full Name	Account	Title	Email	Contact Type
<a href="#">Edit</a> <a href="#">View</a> <a href="#">Clone</a>	Angel Berry	Simpleview Hotel and Conference Center		aberry@simpleviewinc.com	Primary
<a href="#">Edit</a> <a href="#">View</a> <a href="#">Clone</a>	Alena Chaika	Simpleview Hotel and Conference Center		achaika@simpleviewinc.com	Secondary

After you click the **Profile** icon and then **Contacts**, you will see a list of all the contacts associated with your account. On this page you can Add, Edit, View, and Clone (i.e. duplicate) a contact depending upon your extranet permissions.

**Update Contact**

Sections:

- [Contact Information](#)
- [Address Information](#)
- [Phone Information](#)
- [Additional Information](#)
- [ecomm](#)
- [Social Media](#)
- [General](#)

**Contact Information**

Account: Required Simpleview Hotel and Conference Center

First Name: Required Angel

Last Name: Required Berry

Full Name: Required Angel Berry

Department:

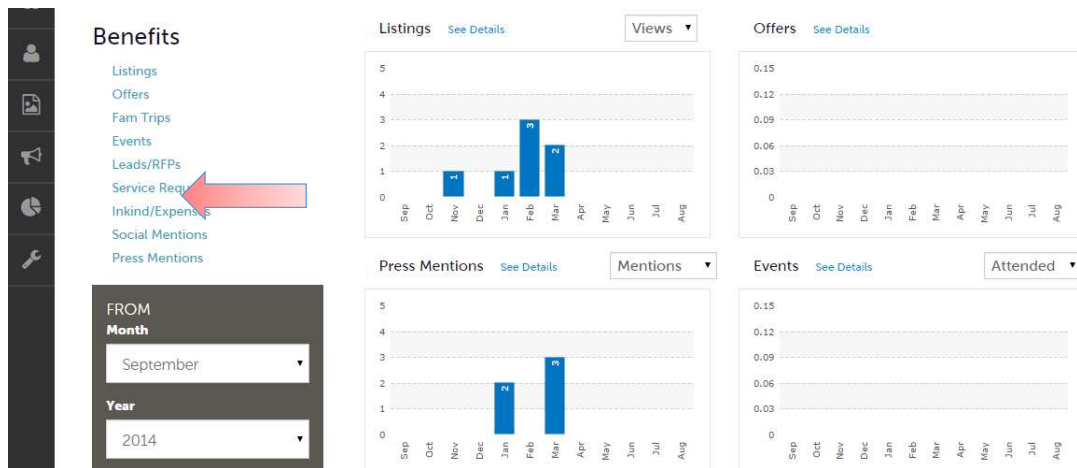
Title:

Contact Type: Required Primary

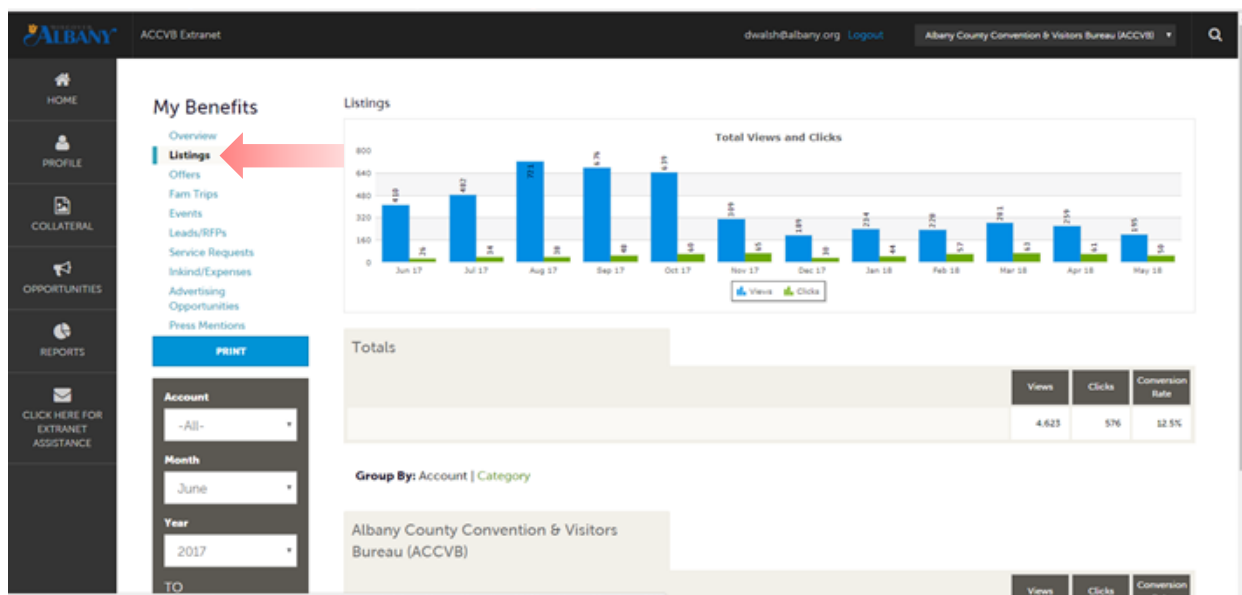
Preferred Contact Method: Email

When you view or edit a contact, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing a contact, the button in the top left will say Edit. If you are editing a contact, the top left button will say Save. You must click the Save button before any of your changes are actually saved! **IMPORTANT NOTE:** If a contact has left your account, you will need to notify the ACCVB and change their contact type to "Inactive".

# Manage Profiles – My Benefits

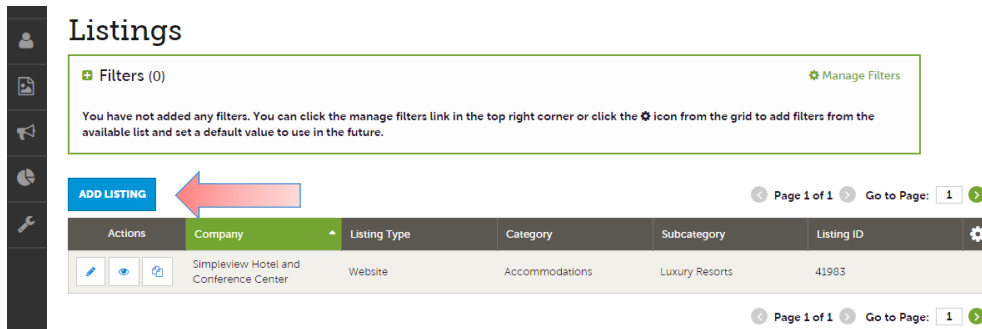


After you click the **Profile** icon and then **My Benefits**, you will see summary reports based off of Discover Albany's interaction with your account. The information you see on this page is specifically related to your account.

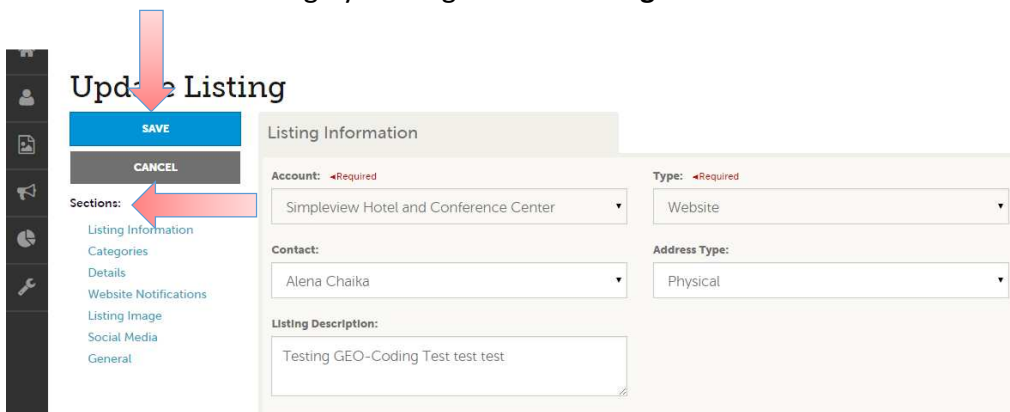


By selecting a specific menu item, for example "Listings" you can see how your listings have performed on Albany.org in depth. Including listing views, clicks, and a conversion rate.

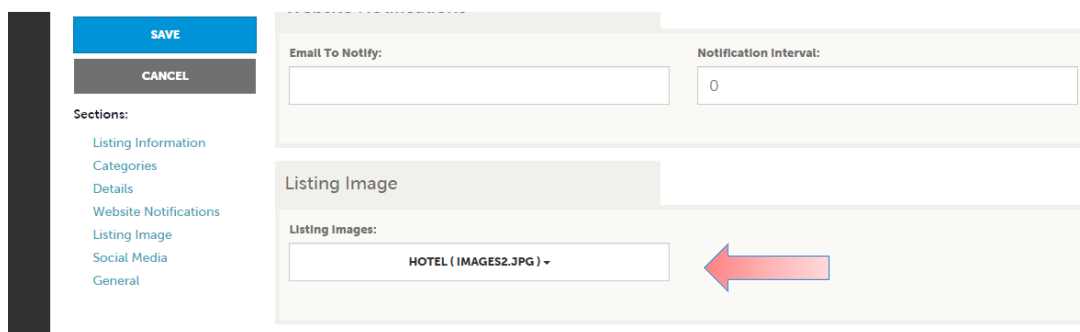
# Collateral - Listings



After you click the **Collateral** icon and then **Listings**, you will see your account's listings. These listings may be website listings or visitor guide listings. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information. The clone icon will allow you to duplicate a listing. You can also create a new listing by clicking the **Add Listing** button.



When you view, edit, or add a listing, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing a listing, the button in the top left will say Edit. If you are editing a listing, the top left button will say Save. You must click the Save button before any of your changes are actually saved! **IMPORTANT NOTE:** Any edits or added listings will require approval from Discover Albany. Upon saving your updates, Discover Albany will be notified of your changes/adds.



When you edit or add a listing, you can select one or multiple images to associate to the listing by selecting the **Listing Images** pull down menu. Any edits or added listings will require approval from Discover Albany. Upon saving your updates, Discover Albany will be notified of your changes/adds. More on images on page 13. **NOTE:** Not all listing types allow for images to be added.

# Collateral – Special Offers

**Offers**

Filters (0) [Manage Filters](#)

You have not added any filters. You can click the manage filters link in the top right corner or click the icon from the grid to add filters from the available list and set a default value to use in the future.

**ADD OFFER**

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending
	20% Off Rooms Sunday through Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No

Page 1 of 1 Go to Page: 1

After you click the **Collateral** icon and then **Special Offers**, you will see your account's offers. The pencil icon will allow you to edit an existing offer. By clicking the eyeball icon, you can view the existing offer. The clone icon will allow you to duplicate an offer. You can also create a new offer by clicking the **Add Offer** button.

**Update Offer**

**SAVE** **CANCEL**

**Sections:**

- Offer Information
- Offer Image
- Offer Dates
- Offer Categories
- Offer Listings
- General

**Offer Information**

Account: \*Required Simpleview Hotel and Conference Center

Offer Title: \*Required 20% Off Rooms Sunday through Thursday Nights

Offer Link: www.simpleviewinc.com

Offer Text: Get 20% Off Rooms Sunday through Thursday Nights in the month of August!

**Offer Image**

Offer Image: Hotel ( images2.jpg )

When you view, edit, or add an offer, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing an offer, the button in the top left will say Edit. If you are editing an offer, the top left button will say Save. You must click the Save button before any of your changes are actually saved! As with listings, you have the ability to attach images to your offers.

**IMPORTANT NOTE:** Any edits or added offers will require approval from Discover Albany. Upon saving your updates, Discover Albany will be notified of your changes/adds.

**Offer Categories**

Offer Categories: CHOOSE AMONG THE FOLLOWING... ▾

**Offer Listings**

Offer Listings: ALBANY COUNTY CONVENTION & VISITORS BUREAU (ACCVB) (WEBSITE: BUSINESS AND... Albany County Convention & Visitors Bureau (ACCVB) (Website: Business and Community Services: Business Associations) ✓ Albany County Convention & Visitors Bureau (ACCVB) (Visitors Guide: Business & Community Services: Business Associations)

\*\*\*Make sure to select the listing you want the offer to appear on from the dropdown at the bottom. Multiple listings can be selected.

# Collateral - Events

After you click the **Collateral** icon and then **Calendar of Events**, you will see your account's events. These are public events that will post to the Albany.org calendar of events. Examples of acceptable events include festivals, sporting events, traveling or temporary exhibitions or shows, community and professional performances and college or university level performances. The pencil icon will allow you to edit an existing event. By clicking the eyeball icon, you can view the existing event. The clone icon will allow you to duplicate an event. You can also create a new event by clicking the Add Event button.

When you view, edit, or add an event, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing an event, the button in the top left will say Edit. If you are editing an event, the top left button will say Save. You must click the Save button before any of your changes are saved! **IMPORTANT NOTE:** Any edits or adding of events will require approval from Discover Albany Upon saving your updates, Discover Albany will be notified of your changes/adds.

## Collateral – Events (cont'd)

The screenshot shows the 'Recurrence Options' section of an event form. On the left, a sidebar contains 'SAVE' and 'CANCEL' buttons, and a 'Sections:' menu with links for 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The main form area has tabs for 'One Day', 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Weekly' tab is selected, indicated by a red arrow. Below the tabs, the 'Weekly Recurrence Options' section shows 'Every 1 Week(s) on MONDAY, TUESDAY, WEDNESDAY', with a red arrow pointing to the days. The 'Recurrence End' section has three options: 'No End Date', 'End after 0 occurrences', and 'End on 09/30/2015'. Red arrows point to the 'End after' and 'End on' options.

The **Calendar of Events** has a recurrence model built-in. You can make your event a one-time event, daily, weekly, monthly, or yearly. If it is not a one-day event, you can choose your recurring days of the event. Depending upon if it is daily, weekly, monthly, or yearly, your recurrence may change. At the bottom of the recurrence section, you can choose to end your event after a certain number of occurrences or on a specified date.

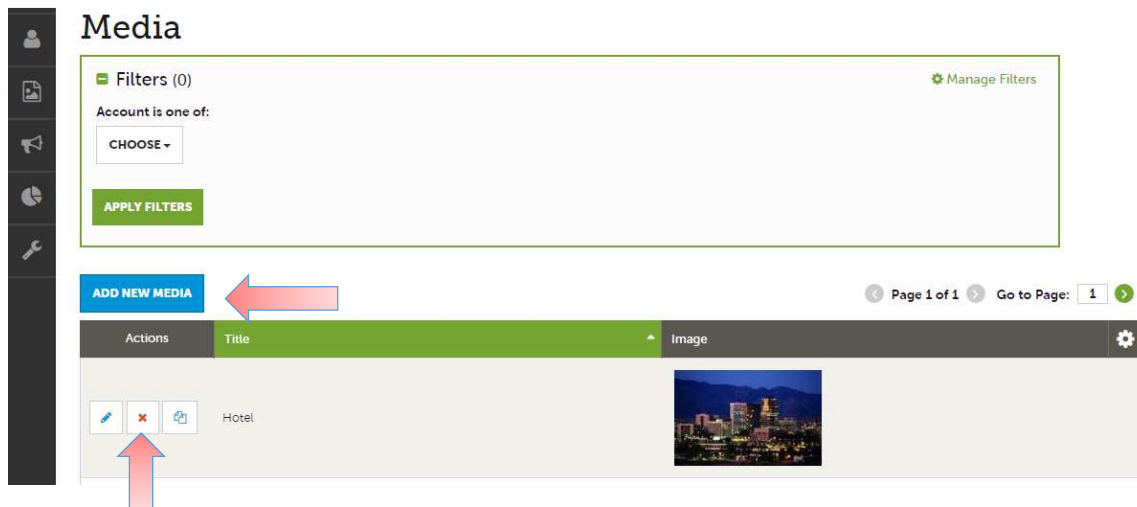
The screenshot shows the 'Image Gallery' section of an event form. The sidebar is identical to the previous screenshot. The main form area has a tab for 'Image Gallery', indicated by a red arrow. Below the tab, there is a large dashed box with the text 'Drag and Drop Files here' and 'or use the "Browse" button below to find files to add'. A red arrow points to this text. Below the text is a blue 'BROWSE' button.

As with Listings and Special Offers you can add images to your event. Adding images to an event is a little different though. In the image Gallery section on the event, you can drag and drop an image or click the Browse button to search your computer for an image.

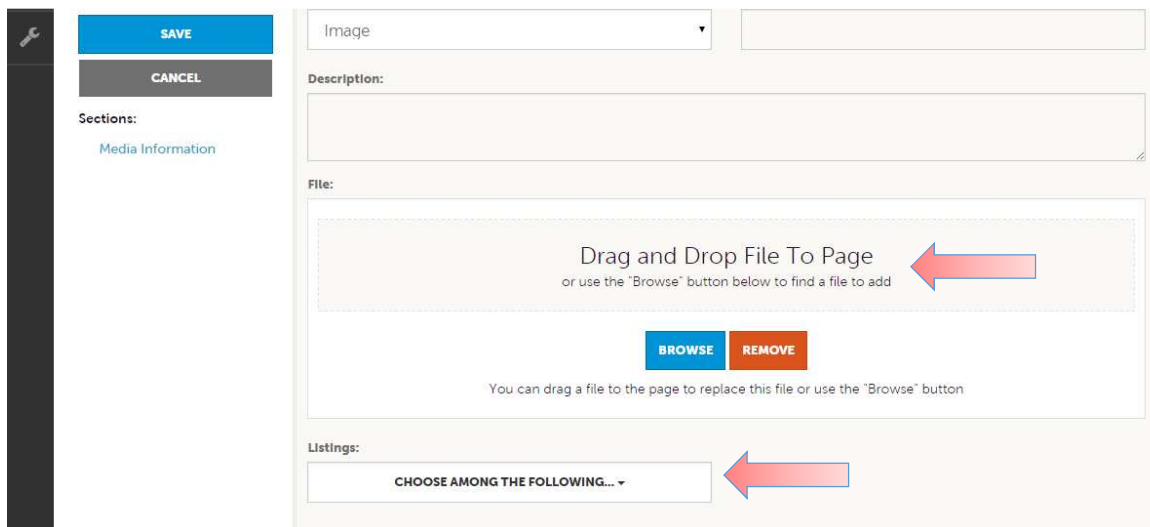
You can select multiple event categories.

The screenshot shows the 'Event Categories' section of an event form. The sidebar is identical to the previous screenshots. The main form area has a 'Categories:' label with a red arrow pointing to it. Below the label is a dropdown menu titled 'TASTES AND TRADITIONS, MUSIC & COMEDY'. The dropdown menu is open, showing a list of categories. The categories 'Tastes and Traditions' and 'Music & Comedy' are selected, indicated by blue checkmarks. Other categories in the list include 'Culinary Events', 'Educational', 'World War I', 'Family Friendly', 'Festivals, Fairs & Special Events', 'Free Event', 'Henry Hudson Planetarium', 'History & Heritage', 'Holiday Celebrations', 'Museums, Galleries & Exhibitions', 'Nature, Outdoors & Adventure', 'Sports & Recreation', 'Theater & Performing Arts', 'Tours & Sightseeing', 'Visitors Center', 'Alive at Five', 'Haunted Events', 'New York Women's Suffrage Centennial', 'Erie Canal Bicentennial', 'Wolf Road', and 'MAAC'.

# Collateral - Media



After you click the **Collateral** icon and then **Media**, you will see your account's images to be used possibly in listings, offers and events. The pencil icon will allow you to edit an existing image. By clicking the red x icon, you can delete an existing image. The clone icon will allow you to duplicate an image. You can also add new images to your library by clicking the **Add New Media** button.



As with Calendar of Events you can browse your hard drive or drag and drop an image. Once you upload a new image or edit an existing one, you can attach the image to one or multiple listings by selecting the Listings pull down menu.



# Collateral – Materials Request

Materials Requests

Filters (0) [Manage Filters](#)

Status is:

**APPLY FILTERS**

**ADD MATERIALS REQUEST**

Page 1 of 1 Go to Page: 1

Actions	Order ID	Send Date	Full Name	Company	City/State/Zip	Items Ordered
	1384	08/07/2015	Shawn Wilkins	Simpleview Hotel and Conference Center	Tucson, AZ 85741	300

Page 1 of 1 Go to Page: 1

After you click the **Collateral** icon and then **Materials Request**, you will see a list of Albany Visitor Guide orders that you have submitted to Discover Albany. To request visitor guides, click the Add Materials Request button. You can also edit, view, or clone (duplicate) an existing order by clicking the Pencil, Eyeball, or Clone icons.

**SAVE**  
**CANCEL**

Sections:

- Materials Request Information
- Attached To
- Order Recipient
- Order Address
- Order Detail

Albany County Convention & Visitors Bureau (AC) (518) 434-1217 Ext 203

Fax: (518) 434-0887 Ext Email: kquandt@albany.org

Order Address

Address 1: \*Required 25 Quackenbush Sq

Address 2:

Address 3:

City: \*Required Albany

State: \*Required New York

Zip: \*Required 12207

Country: \*Required UNITED STATES

Order Detail

Image	Product	Price	Qty	Available
	2017 Albany Visitors Guide	50.00	0	20000

Upon editing or creating a new request, you will see an order form. Within the order form there is an Order Detail section where you can select Albany Visitors Guide and enter the quantity you are requesting. Upon clicking the Save button, Discover Albany will be notified of your request.

# Opportunities - RFPs

**RFPs**

Filters (1)

Manage Filters

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

CHOOSE

Response Date:

-All Dates-

Create Date:

-All Dates-

Organization contains:

Status is one of:

OPEN, OPEN/ BID SENT

APPLY FILTERS

CLEAR FILTERS

After you click the **RFP** icon and then **RFPs**, you will see your account's Sales Leads. The filters will determine which leads you are shown. You can change your filters to narrow down your results by editing the filter fields and clicking the Apply Filters button. By Default, you will see all of your Open Leads and Opens Leads you have already bid on.

Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016	
	05	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016	

Below the filters section, you will see a data grid with all your leads based upon your chosen filters. As mentioned in the Filters and Data Grid section of this manual, you can change these data grid column headings to your preference by clicking the sprocket icon in the top right corner of the data grid. To view the lead, click on the eyeball icon or the Lead Name

## Opportunities - RFPs (cont'd)

crm@simpleviewinc.com  
123.123.1234

See attached RFP for more details.

Sections:

- Lead Information
- Meeting Dates
- Additional Lead Information
- Room Summary
- History/Futures
- Notes
- Responses
- Signage
- General
- Room Data

Meeting Requirements

Schedule of Events

Action Requested

Comments

Competitive Sites

Meeting Specs: 2016-Annual-Convention-RFP.docx

Lost Business Code

Lost Comments

When viewing the lead, you can skip to different sections by clicking the left navigation. Notes and attachments on the lead can generally be found in one of two areas, Lead Information and/or Notes section. In the above graphic, this is the lead section; attachments will be found in the Meeting Specs field.

RETURN

Sections:

- Lead Information
- Meeting Dates
- Additional Lead Information
- Room Summary
- History/Futures
- Notes
- Responses
- Signage
- General
- Room Data

Notes

File	Title	Category	Description
	2016 Annual Convention RFP	Spec Sheet	See attached RFP

Responses

Simpleview Hotel and Conference Center

Status: Open

Currently Assigned: None (Assign)

[PRINT RESPONSE LOG](#) [ADD NEW CONTRACT](#)

Add/Edit	Room Request Dates	Pursuing?	Comments
	02/01/2016 - 02/05/2016		

When you click on the Notes section, you will see the detailed notes for this piece of business. If an attachment is present, this will be signified with a paperclip icon. After you have reviewed the lead, scroll to the Responses section. Here you will see options to either add or edit your existing response. Note: these options are not available once the Response Due Date has passed. Click the Add Response button or Pencil icon to enter/edit your response.

## Opportunities - RFPs (cont'd)

SAVE

CANCEL

Sections:

- [Lead Information](#)
- [Response Information](#)
- [Room Information](#)
- [File Attachments](#)

### Room Information

	Mon 02/01/2016	Tue 02/02/2016	Wed 02/03/2016	Thu 02/04/2016	Fri 02/05/2016	Sat 02/06/2016	Sun 02/07/2016
Doubles	0	0	0	0	0		
Multiple	0	0	0	0	0		
Kings	0	0	0	0	0		
Suites	0	0	0	0	0		
Singles	0	0	0	0	0		
Queen Room	0	0	0	0	0		
<b>Total</b>	0	0	0	0	0		
<b>Requested</b>	10	10	10	10	10		

If you are pursuing the piece of business, you can enter the number of rooms by room type. You can commit to this lead in the Room Information section of the response page.

SAVE

CANCEL

Sections:

- [Lead Information](#)
- [Response Information](#)
- [Room Information](#)
- [File Attachments](#)

Total	0	0	0	0	0		
Requested	10	10	10	10	10		

### File Attachments

ATTACH FILE

or drag files to the page

No files have been attached

To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button to browse your hard drive for the attachments. You can also click and drag your attachment from your computer to the attach file section. Once you have finished entering all your response information, click the save button!

# Opportunities – Media Leads

**All Media Leads**

Filters (0) [Manage Filters](#)

Responded is:  Status is one of:

[APPLY FILTERS](#)

Page 1 of 1 Go to Page:

Actions	Lead ID	Lead Name	Account	Lead Type	Response Date	Arrival	Departure
	1033	2014 Media Lead	Simpleview Hotel and Conference Center	Article	05/10/2014	05/29/2014	10/15/2015

By clicking the **RFP** icon and then selecting **Media Leads**, you can view leads sent to your property by Discover Albany's Marketing Department. These are usually requests for hosting travel writers. These leads can be responded to by viewing the lead.

**RETURN**

Sections:

- Opportunity Information
- Responses
- Notes
- General

**SAVE**

**CANCEL**

Sections:

- Lead Information
- Response Information
- File Attachments

**Responses**

Simpleview Hotel and Conference Center

Status: Open

Add/Edit	Room Request Dates	Pursuing?	Comments
	09/10/2015 - 09/13/2015		

**Response Information**

Pursuing this lead: ☐ YES ☐ NO

Account:

Comments:

As with Sales and Tour leads you can respond or edit an existing response to Media Leads by scrolling to the Responses section and clicking the Pencil icon. Within Responses, you are also able to specify if you are pursuing the business and add attachments.

# Opportunities – Service Requests

**Service Requests**

Filters (1) [Manage Filters](#)

Status is one of:

OPEN, OPEN / BID SENT

**APPLY FILTERS** **CLEAR FILTERS**

Page 1 of 1 Go to Page: 1

Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees
	Transportation for Annual Convention 2016	Simpleview Hotel and Conference Center	Transportation	08/12/2015	08/18/2015	08/20/2015	1200

By clicking the **RFP** icon and then selecting **Service Requests**, you can view non-room night specific leads sent to your account. These requests can range from transportation, audio/visual, catering, etc.

Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about a service request or click the name of the request.

**RETURN**

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

Attendees 1200

Deadline 08/12/2015

Budget \$13,000

Location To/From Hotel & Convention Center

Description Need transportation shuttles for convention running all day from 7am to 7pm.

Additional Documents

- 2016-Annual-Convention-RFP.docx

Section Collapsed, click header to expand.

**RETURN**

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

**Additional Notes and Documents**

File	Title	Category	Description
	RFP	Spec Sheet	See attached RFP for more details

When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads. This information may be contained in the Additional Notes and Documents section of the service Request.

## Opportunities – Service Requests (cont'd)

Accounts/Responses

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Response

General

Response for Simpleview Hotel and Conference Center

Pursuing: ⚡Required

☐ YES ☐ NO

Comments: ⚡Required

If the Response Due Date has not passed, you are able to add/edit a response by clicking the Pencil icon in the Accounts/Responses section of the service request. Once clicked, you can tell Discover Albany if you are pursuing this piece of business by clicking the Yes or No option in the Pursuing section to the right side of the page.

Accounts/Responses

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Response

General

Decision Date

Food / Beverage

Misc. Expense

Category

Economic Value - Lauren Test

Bureau-Only Comments:

These comments will not be seen by the client. They will only be seen by bureau staff.

**ATTACH A FILE**

No files have been attached

**UPDATE** **CANCEL**

As you scroll down the response page on the right, you have the ability to attach proposals by clicking **Attach File** button or click and drag the file from your computer. Click the Update button to save your changes!



# Reports

**ALBANY** ACCVB Extranet dwalsh@albany.org [Logout](#) Albany County Convention & Visitors Bureau (ACCVB) [Q](#)

**Reports**

**Accounts**

[Partnership List](#)

**Leads**

[Compression Report](#)  
Summary of rooms booked across destination each night, including Convention Calendar - Services

[Convention Calendar Report](#)  
Displays Definite, Assist and Convention Calendar Bookings being held during a selected date range.

Under the Reports icon you can view a Discover Albany Partnership List, the Compression Report, or the Convention Calendar Report.

