

Managing your Account on the Extranet

- Log in to the Boston Extranet at <u>https://boston.extranet.simpleviewcrm.com</u>
- Go to the Profile menu where you will have the option to select Accounts or Contacts.

Boston	he Huys Greater Boston Convention & Visitors Bureau CRM - Extranet		
А Номе	Profile Manage your Account	ts	
PROFILE	AccountsContacts		•

 When you select Accounts, your accounts will show up on a page in a grid with filter options above them. You can add or remove filters and change them to find different Accounts. For the grid you can sort by any column and you can also add or remove columns from the display.

Boston	the Huy Greater Boston Convention & Visitors Bureau CRM - Extranet		info@sumiaohunan.com Logout	Sumiao Hunan Kitchen 🔹 🧿
А Номе	Accounts			
PROFILE	 Filters (1) Status is one of:]	🍄 Manage Filters	
COLLATERAL	MEMBER, INDUSTRY PARTNER +	Manage your filters by clicking here		
	APPLY FILTERS CLEAR FILTERS			
			🔇 Pa	age 1 of 1 👂 Go to Page: 1 👂
£	Actions Account			* \$

- Also, you will have some defaults set for filters, but you can change these. Remember to click 'Apply Filters' for the changes to take effect.



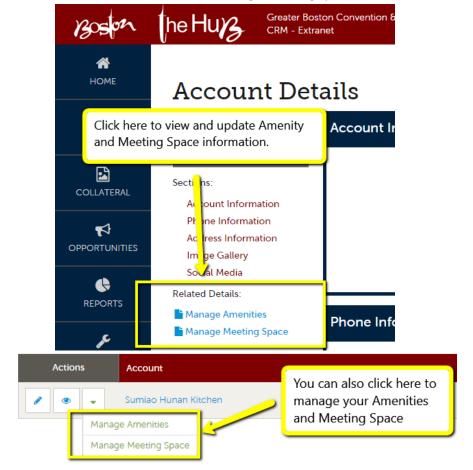
- To view the detail of the Account select the eyeball icon and it will take you to the Account Detail page.

Actions	Account Click here to view		
		Account details	

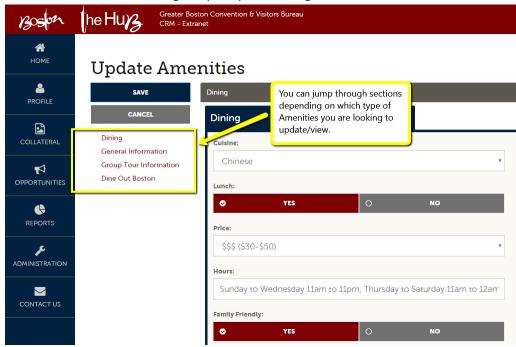
- You are able to view Account Information, Phone Numbers, Address Information, the Image Gallery and Social Media.

Boston	he Huz Greater E	Boston Convention & Visitors Bureau xtranet		
A HOME	Account Details			
PROFILE	EDIT	Account Information		
COLLATERAL	Sections: Account Information	Status Account Extranet Parent		
	Phone Information Address Information Image Gallery	Region		
	Social Media Related Details:	You will be able to view Account information and by clicking here, you can		
چ Administration	Manage Meeting Space	jump to each section.		

- To view and update your Amenity Information select 'Manage Amenities'. To view and update you Meeting Space information click on 'Manage Meeting space'.



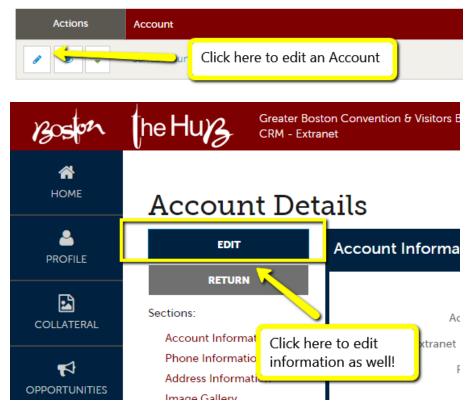
- You can view what is selected for each Amenity and update them as needed. Use the sections listed on the left to help navigate quickly. Don't forget to save!



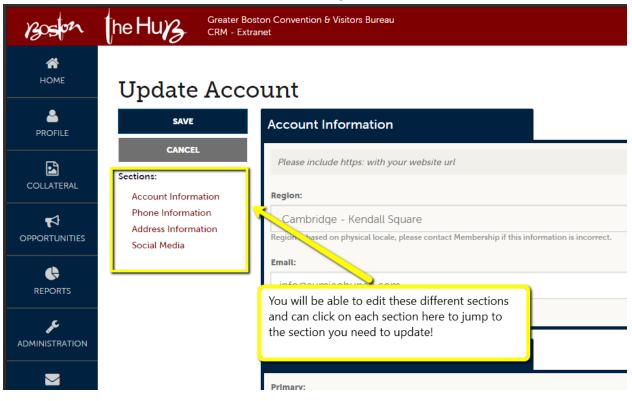
- You can view your facility details and update them as needed. Use the sections listed on the left to help navigate quickly.

Don't forget to save! Greater Boston Convention & Visitors Bureau he Hu/2 Boson CRM - Extranet 1 HOME Facility Details EDIT **Standard Amenities** PROFILE RETURN ID Sections: ymber of Rooms Standard Amenities If you need to Meeting Rooms make any edits, OPPORTUNITIES simply click here to begin updating the € information. **Reception Capacity** You are able to view your facility **Sleeping Rooms** information here and use these Suites sections to jump to where you Villas need to go. Exhibit Space? market and

- To edit an Account, you will want to select the pencil icon on the grid showing the list of Accounts OR you can select edit from the Account Details page.



- Once you have selected edit, you are able to update Property Information, Phone Numbers, Address Information and Social Media. Don't forget to hit save!



*Please note, if the name of your Company or Business has changed, please contact Membership to update the new name for you.