

#### The Charlotte Harbor Gulf Island Coast

# PARTNER PORTAL USER GUIDE

### PARTNER PORTAL USER GUIDE

### Step-By-Step Guide

Welcome to the Partner Portal for updating your **PureFlorida.com** listing. <u>CLICK HERE</u> to login to the Partner Portal. Need a username and password? <u>Email us</u>.

#### Click below to navigate through the process:

- Logging In/Getting Started
- Updating Your Account Info
- Managing Amenities
- Updating Your Contacts
- Creating or Updating Your Listing
- Submitting Special Offers
- Submitting an Event
- Adding Photos, Videos, and YouTube Links

The Partner Portal is a password-protected Customer Relationship Management (CRM) system used to manage information from our local Partner businesses and provide content for the website: PureFlorida.com. It is your gateway to working with the Punta Gorda/Englewood Beach Visitor & Convention Bureau (VCB). Perhaps the most basic, but important aspect of the Partner Portal is that it gives you the ability to edit and update your business's information shared on the VCB website, including: business name, description, company contacts, images, details, and amenities. But that's just the beginning. You can also view research and partner bulletins, submit upcoming events, access and respond to meeting and sports group leads, and so much more.

## LOGGING IN/GETTING STARTED

### Logging in:

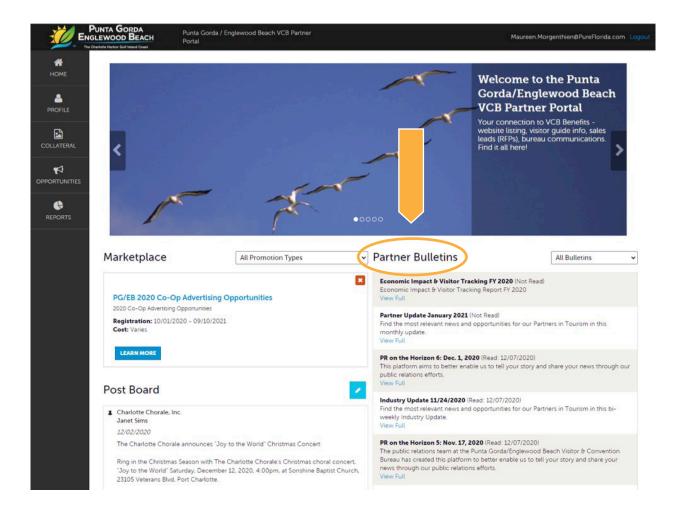
- 1 You will be sent an email from the VCB with the link to the Portal and a temporary password.
- 2 Click on the link, which will take you to a "Punta Gorda/Englewood Beach VCB Partner Portal" login screen. We recommend bookmarking this page.
- **3** Your username is your full email address.
- 4 Your password is the temporary one that was emailed to you. If you've lost your password, please email partners@pureflorida.com for a new one.
- 5 You will be asked to change your password to one of your preference when you log in.
- 6 If you ever have problems getting into your account, contact us at 941.743.1900.

The Partner Portal login page.

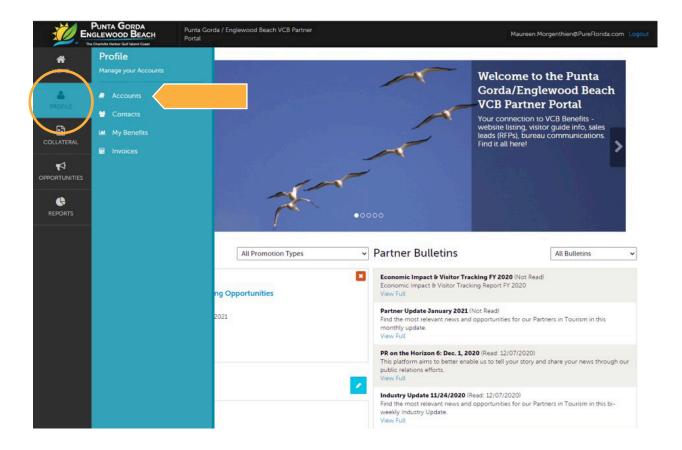
		and the second second
	Punta Gorda / Englewood Beach VCB Partner Portal	
	Email	
	Password	
	Forgot Password?	
1.0		

### **Updating Your Account Info:**

1 The Partner Bulletin contains a Step-by-Step Guide (this document) to update your PureFlorida.com account and listing. Look for it under the Partner Bulletins section.

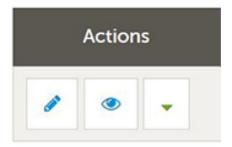


## UPDATING YOUR ACCOUNT INFO



#### 2 Click on Profile to view/edit your business information.

3 Click on Accounts. You'll see your account name and the 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/edit your amenities and meeting space information.



## UPDATING YOUR ACCOUNT INFO

#### 4 Click on the green down arrow.

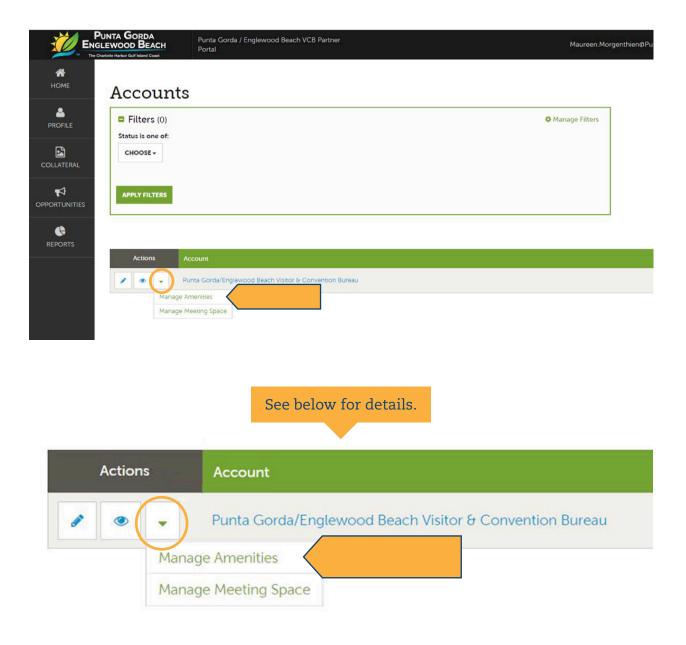
**Manage Amenities** – Your business details are very important to how your listing appears on the PureFlorida.com website. Be sure to be as accurate as possible and be sure to make edits when there are changes at your business.



**IT'S VERY** 

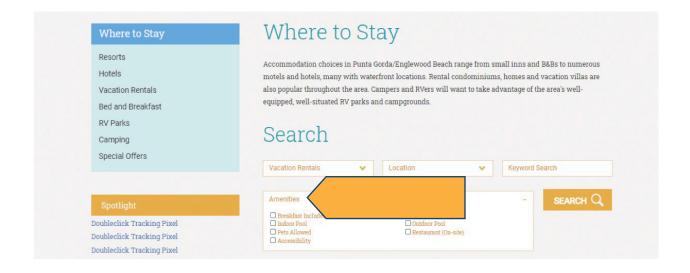
IMPORTANT.

**Manage Meeting Space** – If your business has meeting space please include all the details.

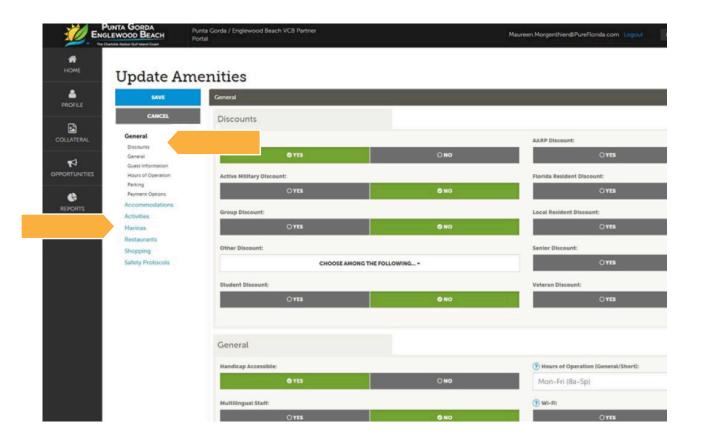


### **Managing Amenities**

Amenities help those visiting PureFlorida.com find your business. For example, under the "Where to Stay" page of the website, visitors can narrow their search by selecting specific amenities such as "Pets Allowed" or "Indoor Pool" (see image below). If you've included these amenities for your business within the "Manage Amenities" section of the Partner Portal, your business will appear in search results to those planning a visit. If you've neglected to include these amenities in the Partner Portal, your business may not appear, and you could lose potential customers.



Once you click on the **Manage Amenities** dropdown on the Account page of the Partner Portal, the page will open with navigation on the left side. You can either scroll down through all of the amenities available or you can click on the category in the left navigation which will expand. Click on the section you want to complete, and it will take you directly to that section.



Keep in mind, the more information you put into the system, the more information will show on **your listing on the website**. Think about how potential visitors would search for information about your particular business. Click on the blue question marks for more information on specific amenities.

Make sure to click the **Save** button before exiting the Amenities section to ensure all your changes are saved.

## MANAGING YOUR AMENITIES

#### New Section for 2021: SAFETY PROTOCOLS

We encourage you to complete the Safety Protocols section. This new section pertains to safety protocols and services born of the COVID-19 pandemic. The fields are all relevant to today's traveler. This is also a good example of how we're always updating the amenities feature to serve our visitors. So check back as often as possible to see what has changed.

Мар	Safety_Protocols	•
Amenities	Accommodations	
	Social Distance Gym Configurations:	•
	Keyless Entry:	÷
	General	
	No Contact Services:	÷
	Sneeze Guards/Contact Barriers:	

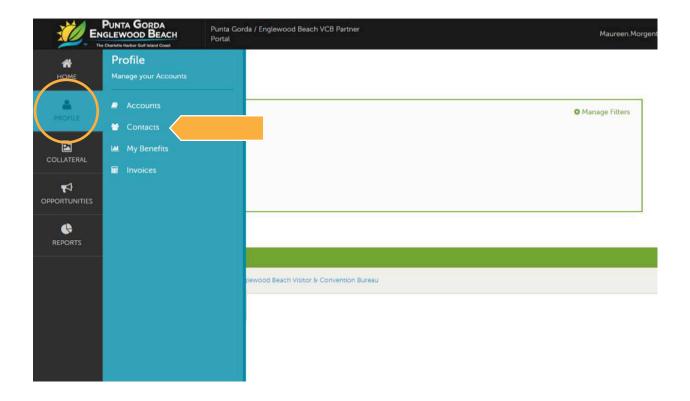
#### Examples of available Safety Protocols amenities:

- Keyless entry
- Takeout
- Delivery
- Outside dining
- Social distance guidelines enforced
- Health screening for staff and guests
- Hand wash/sanitizing stations

## UPDATING YOUR CONTACTS

### Updating Your Business's Contact Information

1 Go back to the Profile icon and select **Contacts**.



### UPDATING YOUR CONTACTS

- 2 You will be presented with a list of all the contacts associated with your business. On this page you can Add, Edit, View, and Clone (i.e. duplicate) a contact.
- **3** To update your contact records, edit the current contact under your listing by clicking the pencil icon to the left of the contact.

The Ch	UNTA GORDA LEWOOD BEACH arlotte Harbor Gulf Infand Coast	Punta Gorda / Englewood Be Portal	ach VCB Partner	ž.	Maureen.Morgenthien@PureFlorida.com Lo	gout Punta
<b>М</b> НОМЕ	Contact	S				
	Filters (0) Account is one of: CHOOSE+		Contact Type is one of: CHOOSE -	O Manage Filters		
	APPLY FILTERS					
	ADD CONTACT					() P
	Actions	Full Name	Account	Title	Email	Contact Type
	Actions	Full Name Jennifer Huber	Account Punta Gorda/Englewood Beach VCB	Title Public Relations Manager	Email Jennifer.Huber@PureFlorida.com	Contact Typ Secondary
		Jennifer Huber	Punta Gorda/Englewood Beach VCB	Public Relations Manager	Jennifer.Huber@PureFlorida.com	Secondary
	/ • @ / • @	Jennifer Huber Sean Doherty	Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB	Public Relations Manager Director of Tourism	Jennifer Huber@PureFlorida.com Sean Doherty@PureFlorida.com	Secondary Secondary
	<ul> <li></li></ul>	Jennifer Huber Sean Doherty Bry Phipps	Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB	Public Relations Manager Director of Tourism Special Projects/Visitor Experience Coordinator	Jennier Huberg PureFlorida.com Sean Doheny BrureFlorida.com Brynja Phippsg PureFlorida.com	Secondary Secondary Secondary
		Jennier Huber Sean Doherty Bry Phipps Lena Applegate	Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB	Public Relations Manager Director of Tourism Special Projects/Visitor Experience Coordinator Administrative Services Coordinator	Jennifer Huber@PureFlorida.com Sean Doherty@PureFlorida.com Brynja Phipps@PureFlorida.com Lena Applegate@PureFlorida.com	Secondary Secondary Secondary Secondary
		Jenniter Huber Sean Doherty Bry Phipps Lena Applegate Susan Tobin	Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB Punta Gorda/Englewood Beach VCB	Public Relations Manager Director of Tourism Special Projects/Visitor Experience Coordinator Administrative Services Coordinator Meetings Manager	Jennifer Huber@PureFlorida.com Sean Doherty@PureFlorida.com Brynja Phipps@PureFlorida.com Lena Applegate@PureFlorida.com Susan Tobin@PureFlorida.com	Secondary Secondary Secondary Secondary Secondary

4 To add a new Contact, click the **"Add Contact"** button. Don't pay too much attention to the Billing Address and Shipping Address. We are primarily concerned with your Physical Address for this purpose.

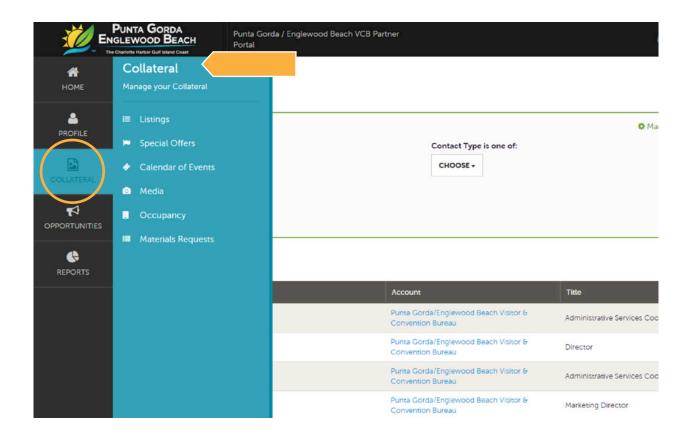
**IMPORTANT NOTE:** If a contact has left your property it is your responsibility to notify the VCB and/or change their contact type to "Inactive." **Contacts cannot be deleted**, therefore they need to be "inactivated."

5

You must click the Save button before any of your changes are actually saved!

### **Creating or Updating Your Listing**

1 **Click Collateral** to open a new collapsible menu. Here you'll see options allowing you view and edit your Listings, Special Offers, Media, and more."



## CREATING OR UPDATING YOUR LISTING

2 After you click on Listings, you will be presented with your listing. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information.

	G Filters (0)			Manage Filters	
			ilters link in the top right corner or clic	sk the $oldsymbol{\phi}$ icon from the grid to add filters from the	
AL L	available list and	set a default value to use in the future.			
	ADD LISTING				
ries	Actions	Company	Listing Type	Category	SubCategory
		Punta Gorda/Englewood Beach VCB	Website	Visitor and Convention Services	Consulting Serv

### What is a Listing?

- The Listing is the description of your business that will appear on PureFlorida.com
- The listing should highlight the features of your business, making it attractive to the viewer

### What's the USP?

The unique selling proposition (USP) or unique selling point is a marketing concept that focuses on showing the business's unique or outstanding feature. In other words, what makes your business stand out?

#### For Example:

Punta Gorda/Englewood Beach, the Charlotte Harbor Gulf Island Coast is a tranquil coastal getaway, perfect for a relaxing and refreshing escape, where you're sure to get a healthy dose of good nature. Enjoy world-class fishing, boating and miles of pristine beaches. Fascinating wildlife and Blueway trails provide a paddling paradise. Life is comfortable, the pace unhurried and outside adventures abound. No matter your vacation pleasure, you'll find pure Florida beauty, good values and warm hospitality. "Is it time to take advantage of our good nature?" We say Outsiders Welcome! **3** When you view or edit a listing, you can quickly scroll to a section on the page by clicking the links on the left side of the page. You must click the **Save** button before any of your changes are actually saved!

Update L	Listing Information		
CANCEL	Account: Kequired		Type: <required< th=""></required<>
COLLATERAL Sections:	Punta Gorda/Englewood Beach VCB	*	Website
Listing Information Categories	Contacts:		Address Type:
OPPORTUNITIES General	Choose One	~	Physical
Details Website Notification	Description:		Keywords:
	Punta Gorda/Englewood Beach, the Charlotte Harbor Gulf Island Coast is a tranqui coastal getaway, perfect for a relaxing and refreshing escape, where you're sure to healthy dose of good nature. Enjoy world-class fishing, boating and miles of pristin beaches. Fascinating wildlife and Blueway trails provide a paddling paradise. Life is comfortable, the pace unhurried and outside adventures abound. No matter your vacation pleasure, you'll find pure Florida beauty, good values and warm hospitality it time to take advantage of our good nature?* We say Outsiders Welcome!	get a le	vcb, dmo, cvb, visitor, center, i

**IMPORTANT NOTE:** Upon saving your updates, the VCB will be notified of your changes. You will receive an email once your changes are updated. The VCB reserves the right to edit your changes as needed.

4 Listing Information: Please type in a general description of your business. This description will display on PureFlorida.com. Focus on what would be of interest to potential visitors and what is unique about your business. The content should entice them to click on the link to visit your website. There is plenty of space to go into detail. Entice enough with your text so visitors click the **website** button on your listing that takes them to your website where they can learn more.



- 5 **Categories:** This will show you which section of the website your listing will appear. This is for the VCB to determine, but if you feel additional categories should be added, contact <u>partners@pureflorida.com</u> or 941.743.1900.
- **6 Listing Image:** You can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu. (More on images in the Adding Media section).
- 7 **Details:** You may overwrite anything listed. Simply click on the circle and start typing to override any info for display purposes on pureflorida.com. This section is useful if you have a parent company, for instance.
- 8 Website Notifications: Would you like to be notified when your website listing has received a certain number of visits? Simply choose an interval and add your email address to set up this automatic notification.

### **Special Offers:**

**Special Offers** are some of the most frequented pages of any website when consumers are focused on getting a "deal" and on making the most of their hard-earned dollars. Special offers should clearly represent a value to the consumer. We have a Special Offers page under the "Where to Stay" navigation. We can also host special offers for dining, attractions, and activities if we have multiple offers to display.

Special Offers for accommodations:

- Should be time-sensitive
- Should include post-from and post-to dates (display dates) for the offer to be live on the PureFlorida.com website
- Should include redeem-to and redeem-from dates (valid dates)
- Should include a complete description of the offer
- Should include a price point and clearly-defined added value as well as a promotional code (if possible, for simplicity and tracking) to facilitate booking the special offer.

**Note:** If there are any restrictions to the offer they must be included (example: valid only Monday to Thursday).

Keep in mind that while the general public may research special offers online, some may choose to call you directly to book the offer so make sure to include a telephone number.

A special offer could also be a package which includes accommodations and something else such as an attraction, activity, or amenity (champagne and breakfast in bed if a romance package). The special offer should also be displayed on your own website so the offer can be linked directly to what the consumer is looking for.

#### Example:

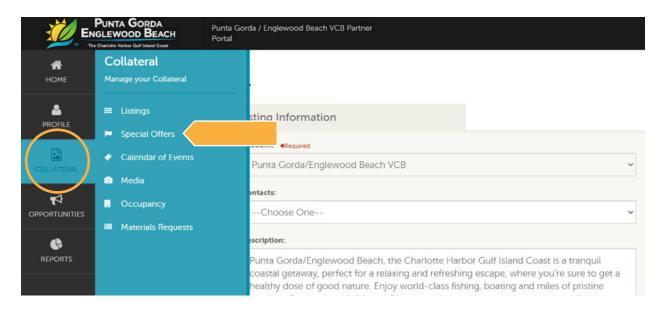
- Stay 2 nights/get the 3rd night free. Booking window: January 1–31, 2021.
   Valid for travel January 5–February 28, 2021. Promotional code: 2Stay3.
   (This offer has no price point, but the value is clear).
- Midweek Special Booking window: January 15–February 15, 2021. City-view rooms \$89.00.

Images are required for any offer. **Please note: we do not accept logos, flyers, or images with text. You must have the rights/permissions to use all images you submit.** Landscape-oriented photos with a 72 dpi resolution and a size of at least 800 pixels wide by 433 pixels tall are optimal. Be creative!

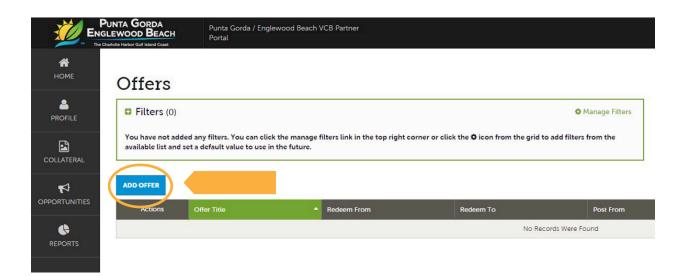
Each special offer submitted will be pending until approved by the VCB marketing staff. We reserve the right to deny the approval or edit the submission. If we have questions, need clarification, or have recommendations to improve the offer, we will reach out to you.

#### Submitting a Special Offer:

1 After you click on Special Offers under the Collateral menu, you will be presented with your business's offers (if any). 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.



2 2. You can also create a new offer by clicking the **ADD OFFER** button.



**3** 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 side 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. As with Listings, you have the ability to attach images to your offers.

	PUNTA GORDA INGLEWOOD BEACH The Charlotte Harbor Gulf Island Coast	Punta Gorda / Englewood Beach VCB Partner Portal	Maureen Morgenthien@PureRorida.com Logo
<b>М</b> Номе	New Offe	r	
	SAVE	Offer Information	
	CANCEL	Account: <required< th=""><th>Offer Title: <required< th=""></required<></th></required<>	Offer Title: <required< th=""></required<>
	Sections: Offer Information	Punta Gorda/Englewood Beach VCB	~
	Offer Image Offer Dates Offer Categories Offer Listings	Offer Link:	Offer Text:
	Offer Listings		

- **4 Offer Information:** The Offer Title will display on your deal. The Offer Link will link to the offer posted on your website. The Offer Text should be a brief description of the deal.
- 5 Offer Image: Please choose the image to accompany your special offer.

#### 6 Offer Dates:

- **a.** Redeem From and To = dates the offer is valid.
- **b.** Post From and To = dates to display the offer.
- **7 Offer Categories:** Please select a category that will determine where your offer will appear on pureflorida.com.
- 8 Remember to Save.

**IMPORTANT NOTE:** Any edits or submission of new offers will require approval from the VCB. Please make sure your special offer is indeed a special offer and provides a tangible value to visitors or it will not be approved. Upon saving your updates, the VCB will be notified and will email when the changes are updated/approved.

#### **Events**

The Events page is used to entice visitors to choose Punta Gorda/Englewood Beach over many other competing destinations when looking for a warm weather getaway and seeking outside pursuits. The success of the events page depends on the value to the potential visitor and the interest in the events displayed. It can also be used to see what is happening in-market during a planned visit.

Before submitting an event, ask yourself: Does this event make people want to visit Punta Gorda/Englewood Beach? Does this event help in the decision-making process of selecting a destination to visit, or will it provide a memorable experience while in destination? If so, we invite you to submit an event.

An event is defined as a dated happening that would draw visitors from outside the local area. It could be a festival or fair, arts or cultural event, a sporting event, or the like. If your event is more local and community-focused—i.e., what's happening in town this week, a charitable event, or where can we go to eat on Tuesday—your event would be better served on a Chamber of Commerce calendar or the event calendar on your website.

#### Examples of events are:

- A 2-day arts fair
- A week-long performance of a play
- A music festival
- A paddleboard or kayak race event
- A half marathon
- A museum exhibit

Please note: Taco Tuesday, weekly specials, tours, and local entertainment for an evening are not considered an event.

Each submitted event must be approved by VCB marketing staff. The VCB reserves the right to edit submissions or withhold approval if there is not enough information provided or if an event does not qualify as one that will attract out of area visitors. You will receive an email notification regarding the status of your event submission.

### SUBMITTING AN EVENT

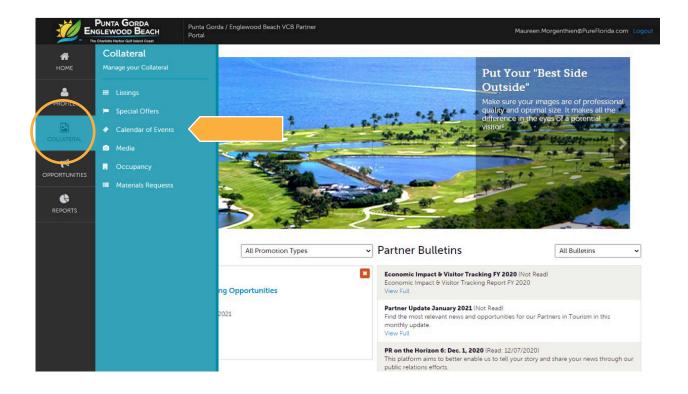
Images are required for every event. **Please note: we do not accept logos, flyers, or images with text. You must have the rights/permissions to use all images you submit.** Landscape-oriented photos with a 72 dpi resolution and a size of at least 800 pixels wide by 433 pixels tall are optimal. Be creative!

In accordance with our new criteria, regularly-scheduled weekly events (such as nightly live music, tours, etc.) no longer qualify as tourism-related events. We encourage you to integrate those weekly events in the description of your business in your listing.

#### Submitting an Event:

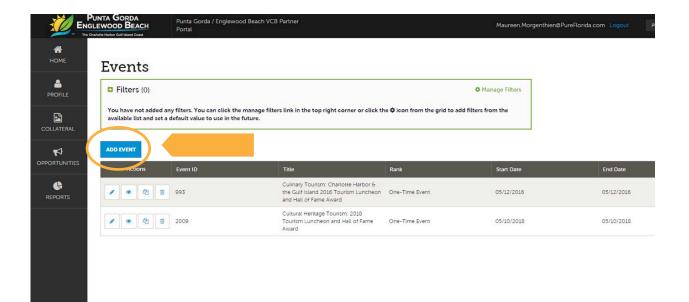
1 Go to Collateral, then **Calendar of Events**. You will be presented with your property's events (if any). The pencil icon will allow you to edit an existing event. By clicking the eyeball icon, you can view the existing event. The clone icon will allow you to duplicate an event. The trashcan will delete an event.





### SUBMITTING AN EVENT

- 2 You can create a new event by clicking the **ADD EVENT** button.
- 3 When you view, edit, or add an event, you can quickly scroll to a section on the page by clicking the navigation links on the left side 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 actually saved! As with Listings and Special Offers, you have the ability to attach images to your events.



### SUBMITTING AN EVENT

**Event Information:** The title will display on your event. The event link will link to the website for the event. The event description should be a brief description of the event. If there is an admission fee include that information. Fill in the mandatory fields of rank and category and the remainder of the fields. The more information posted, the better for the visitor.

PUNTA GORDA ENGLEWOOD BEACH The Charlotte Harbor Guil Island Coast	Punta Gorda / Englewood Beach VCB Partner Portal	Maureen.Morgenthien@PureF	lorida.co
F.			
New Ever	nt		
FILE SAVE	Event Information		
CANCEL Sections: TERAL Event Information	In order to have your event added to our online calendar, please note: it must take place exhibits, tours, concerts, performances, festivals and major sporting events. Events that lo professional events, yard sales, and most lectures or seminars. Your event will NOT autor ill the information needed to be added and is a tourist-related event	ean to the local community side of things and matically be added to the calendar once subm	l would n
Event Location     Event Dates     Image Gallery	emented for events.	Title: <required< td=""><td></td></required<>	
	Punta Gorda/Englewood Beach Visitor & Convention Bureau	×	
RTS	Contact:	Admission:	
	Choose One	~	
	Description: 4Required Please note: links and text formatting will not display on the site. Contact Julie.Pennock@C	TharlotteCountyFL.gov with any questions.	
	Source B I S I .: := := := :E		

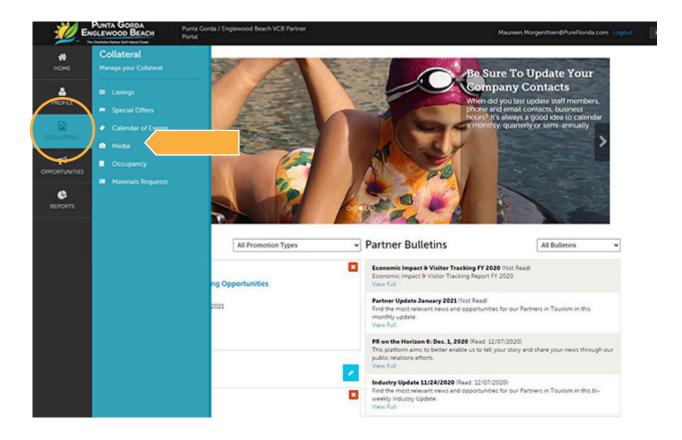
- 5 Add the event location.
  - Add the event date with a start and end time or times. Choose frequency.

**7** Event Image: Please choose the image to accompany your event. You can choose from an image already in your gallery or drag/drop or upload a new one. Please note: we do not accept logos, flyers, or images with text. You must have the rights/permissions to use all images you submit. Landscape-oriented photos with a 72 dpi resolution and a size of at least 800 pixels wide by 433 pixels tall are optimal.

#### 8 Remember to Save.

### Adding Photos and Video (Media)

1 After you click the Collateral icon and then **Media**, you will be presented with your business's images that have been uploaded into the portal. These may be used in listings, special offers, and events.



2 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.

Ф

**3** You can add new images by clicking the **ADD NEW MEDIA** button.

	UNTA GORDA LEWOOD BEACH Nariotie Harbor Gaif Island Coast	Punta Gorda / Englewood Beach VCB Pa Portal	rtner	Mauree
<b>А</b> Номе	Media			
	<ul> <li>Filters (0)</li> <li>Account is one of:</li> <li>CHOOSE -</li> </ul>			O Manage Filters
	APPLY FILTERS			
	ADD NEW MEDIA			
	Actions	Title	Description	Image
	1 × 0	PG/EB Logo		PUNTA GORDA ENGLEWOOD BEACH The Charlens Harder Charl
	<ul> <li>× @</li> </ul>	Visitor Bureau - Generic Gasparilla Water		

4

Media Information: You can browse your hard drive or drag and drop an image or video. Once you upload a new image/video (or edit an existing one), attach the image/video to one or multiple listings by selecting the Listings pull down menu.

	Punta Gorda / Englewood Beach VCB Partner Portal	Maureen Morgenthien@PureFlorida.com Log-
HOME New M	edia	
	Photos and Videos added to profile pictures generate FAR mo	e response from the potential visitor. Please upload high resolution (We recommend 1920w x 1080h or higher), graphics and text, Avoid logos as primary collateral. For videos, simply have a youtube video link.
COLLATERAL Sections: Media Informat		raphics and text. Avoid logos as primary conateral. For videos, simply have a youtube video link. Title: ∢Required ✓
C REPORTS	Type: «Required Image	1 Title in required Sort Order:
	Description:	
	File: «Required	
		Drag and Drop File To Page or use the "Browse" button below to find a file to add
		You can drag a file to the page to replace this file or use the 'Browse' button
	Listing: CHOOSE AMONG THE FOLL	owing

**Important:** Landscape-oriented photos with a 72 dpi resolution and a size of 800 pixels wide by 433 pixels tall are optimal. Be creative!

**Disclaimer:** Smaller images can appear blurry, even if they are higher than 72 dpi. Larger is better than smaller. Higher resolution is better than lower.

5

Follow the same steps to add additional images. These photos will appear when someone clicks on your listing, event, or special offer from pureflorida.com. Consistency looks best, so please choose similarly-sized photos. Again, horizontal layout is preferred.



Please note: We do not accept logos, flyers, or images with text. You must have the rights/permissions to use all images you submit.

6 When adding a link to a **YouTube** video, provide a title you want displayed, select **YouTube** under **Type**, and provide the YouTube link under **Video Link**. Make sure to attach the video to one or multiple listings by selecting the Listings pull down menu.

	PUNTA GORDA GLEWOOD BEACH Charletter Harber Guill Indard Coast	Punta Gorda / Englewood Beach VCB Partner Portal	Maureen Morgenthien@PureRorida.com Logout Punta Gorda/E
<b>А</b> НОМЕ	New Medi	ia	
	SAVE	Media Information	
	CANCEL Sections:		more response from the potential visitor. Please upload high resolution (We recommend 1920w x 1080h or higher), landscape oriented pho ded graphics and text. Avoid logos as primary collateral. For videos, simply have a youtube video link.
₹2	Media Information	Account: «Required	Title: «Required
OPPORTUNITIES		Punta Gorda/Englewood Beach VCB	Title is required
REPORT		Type: <required YouTube</required 	Sort Order:
		Description:	
		Video Link: equired	Listings:
			CHOOSE AMONG THE FOLLOWING *



Make sure to Save.

And that's how you manage your information on **PureFlorida.com** through the Partner Portal!

Any questions or issues, please contact the VCB at <u>partners@pureflorida.com</u> or 941.743.1900.