Logging In:
1. You will be sent an email from the CVB with the link and a temporary password.
2. Click on the link, which will take you to the “CRM Extranet Login” screen. The web address is http://extranet.charlottesville.simpleviewcrm.com/
3. Your username is your full e-mail address.
4. The first time you log in, your password is the temporary password that was e-mailed to you. After the first time, it will be the password you have chosen.
5. You will be asked to change your password to one of your preference. Click on the “Forgot Password?” link if you need to reset your password.

Viewing Your Member Record:
You can view five items under your Member Record:
1. Contacts
2. Listings (Website)
3. Web Tab – Coupons/Special Offers and Photos/Logos
4. Amenities
5. Benefits Summary
Contacts:
1. To update your contact records, click the pencil icon (✏️) next to the contact.

2. To add a new Contact, click the “New Contact” button.

3. You can also clone a contact by clicking on the “Clone” link (❐) to the left of a current contact. This will make a duplicate contact. You can change the information that needs to be updated (i.e. name, e-mail address, phone #, etc).

4. When adding a new contact, please fill in all available fields. Fields in RED will be required. Make sure to click “Save” once you’ve filled out all of the fields.
Adding A Listing:

1. To update your website listing, click the pencil icon (-pencil-) to the left of the appropriate listing under the Listings tab. You will then be able to change the listing.

2. To add a listing, select the Listings tab and then click “Add New Listing” to the right of the screen.

3. All updates concerning listings will be placed in “pending” status until the updates have been approved by the CVB. The added or updated listings will display on the website once this take place.
Editing a Listing:
1. Contact Drop-down: This contact, if chosen, will show on the website listing.
2. Address: Select “Physical” to display the main address on your Account.
3. Category: the main category your listing is in (i.e. Attractions, Accommodations, etc). This must be changed by CACVB staff.
4. Sub-Category: (i.e. museum, historical site, etc – a more defined category). This must be changed by CACVB staff.
5. Listing: The text that will show on your listing page. It can include a description of the business, history, hours of operation, etc.
6. Listing Details – anything you enter into these fields will override the information in your “Account Detail” – otherwise it will automatically pull that information into your listing. For instance, if the public name of the business is different from the name on the account, you would use the Company override. Similarly, you can include different web page, email address, etc.
7. Near the bottom of the screen, you can also enter an e-mail to be notified when the website listing reaches a designated number of hits.
8. Click the “save” button to save your changes.
**Coupons/Special Offers**

1. This feature gives members the opportunity to create and update special offers to be displayed on the website.

2. To create a coupon, click on the "Add New Coupon" Button under the Web tab.

3. A window will open up, allowing you to enter a title of the coupon, as well as a description and what the coupon entails (discount, free item, etc).
   a. The "Redeem From" & "Redeem To" Dates – these will print on the coupon as dates which the coupon is valid
   b. The "Post To" and Post From" Dates – determined by you, your coupon will only show up on the website during these dates –it will automatically be removed on the day after the "Post From" date
   c. You can use the check box(es) at the bottom of the page to link the coupon to your web listing by selecting the appropriate listing.
4. This coupon will then appear on your individual listing, as well as on a page listing all Coupons/Special Offers that our partners have available.

5. Visitors can print the coupon to redeem at your business.

6. To edit the coupon, you just need to click on the pencil icon (✏️) to the left of your coupon, and make the desired changes.
Photos and Logos

Here you can add photos or logos, and edit which listings each will show up on (if you have more than one listing).

1. In Media, under the Web tab, click the “New Logo/Image” Button.

2. Choose whether you wish to upload a logo or an image. Logos show up at the top of the main listing. Photos are in the photo tab on the main listing.

3. Put in a title for the image/logo, then click “Choose file” and find the image on your computer.

4. If you have more than one listing, select which listings you wish to have the image/logo show up on.

5. Click “Save.”
Amenities:

1. Each business can update their amenity information as they see fit. This information can be viewed on the CVB website & may be included in print materials.

2. Select the appropriate tab under Amenities

3. Click “Edit Amenities” to update
Benefits Summary:

This tab will display reporting associated with your account. As the CVB works on your behalf the tabs will be populated giving you the opportunity to stay abreast of all of the great things the CVB is doing to assist your business.

1. Inkind/Expenses
2. Leads (explained in Meeting Sales & Group Tour instructions)
3. Services
4. Events
5. Articles
6. Web Site
7. Coupons

Inkind/Expenses:

1. The Expenses section shows you the dollar amount CVB has spent with your business.

2. The Inkind section shows if you have donated your services to CVB and the value of the donation.
Leads:
This tab will display a detailed list of all Leads that were sent to your business by the CVB. The list is broken down by department & shows the number of Leads in a particular status during the selected time frame.

1. **Total Number of Leads Sent** - This is the number of Leads sent to your business during the selected timeframe.
2. **Number of Leads Pending** - The number of Leads that have been sent, but the winning property has not been selected.
3. **Number of Assists** - The number of Leads where the CVB assisted in the booking. This means the CVB was notified by the client who already knew they wanted to stay at your property.
4. **Number of Leads Lost to Another City** - The number of times the piece of business was lost to a competing city.
5. **Number of Leads Lost to Another Property** - These Leads are committed to Charlottesville, but selected a property other than yours. Number of Leads Won, but Cancelled - Your property was originally awarded the business, but the client was forced to cancel.

### Account Detail: SimpleView Hotel

<table>
<thead>
<tr>
<th>Account ID: 188212</th>
<th>Status: Active - Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account: simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</td>
<td>Region: Charlottesville and Albemarle County</td>
</tr>
<tr>
<td>Email: <a href="mailto:astone@simpleviewinc.com">astone@simpleviewinc.com</a></td>
<td>Web Site: <a href="http://www.simpleviewinc.com">http://www.simpleviewinc.com</a></td>
</tr>
</tbody>
</table>

| Phone/Fax Numbers | 
|--------------------|---------------------------|
| Primary: | Alternate: |
| TollFree: | Fax: |

| Address Information | 
|--------------------|---------------------------|
| Physical Address: 7458 N La Cholla Blvd #100 | Billing Address: 7458 N La Cholla Blvd #100 |
| Tucson, AZ 85741 UNITED STATES | Tucson, AZ 85741 UNITED STATES |
| Shipping Address: 7458 N La Cholla Blvd #100 | 
| Tucson, AZ 85741 UNITED STATES | 

### Additional Fields

**Ink/Expenses** | **Listings** | **Web** | **Amendities** | **Benefits Summary**
--- | --- | --- | --- | ---
**Contacts** | **Listings** | **Web** | **Amendities** | **Benefits Summary**
--- | --- | --- | --- | ---
**Ink/Expenses** | **Listings** | **Web** | **Amendities** | **Benefits Summary**
--- | --- | --- | --- | ---
**Ink/Expenses** | **Listings** | **Web** | **Amendities** | **Benefits Summary**
--- | --- | --- | --- | ---

**Date Range:** 01-01-2010 to 12-31-2010

### Meeting Sales

<table>
<thead>
<tr>
<th>Total Number of Leads Sent</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Leads Pending</td>
<td>0</td>
</tr>
<tr>
<td>Number of Assists</td>
<td>0</td>
</tr>
<tr>
<td>Number of Leads Won</td>
<td>0</td>
</tr>
<tr>
<td>Number of Leads Lost in Another City</td>
<td>0</td>
</tr>
<tr>
<td>Number of Leads Lost to Another Property</td>
<td>0</td>
</tr>
<tr>
<td>Number of Leads Won, but Cancelled</td>
<td>0</td>
</tr>
</tbody>
</table>

### Tour/Travel

<table>
<thead>
<tr>
<th>Total Number of Leads Sent</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Leads Pending</td>
<td>0</td>
</tr>
<tr>
<td>Number of Assists</td>
<td>0</td>
</tr>
<tr>
<td>Number of Leads Won</td>
<td>0</td>
</tr>
</tbody>
</table>
Services:
The Services Tab works much like the Leads tab, but is a breakdown of all Service Requests that were sent to your property.

1. Number of Service Requests Sent-The number of Service Requests sent to your property from the CVB.
2. Number of Service Requests Won-The number of Service Requests where the client selected your business.
3. Number of Partner Referrals-The number of times the CVB recommended your business to a traveler.

Articles:
1. This tab will show you the details on any media publication where your property was mentioned & the CVB had a direct role in getting that article to print.
2. The publication, article title, date of publication and circulation of the publication will be detailed in this section.

Website & Coupons:
1. Under the Website & Coupons tabs, you can view the following:
   a. The number of times your listing or coupon has been viewed during the specified dates (you can view month-by-month by using the drop-down menus as seen below).
   b. How many times your listing or coupon has been viewed since a specified date
   c. Under Web Site, you can change the Notification Number (you will be sent a notification e-mail when your listing has been viewed 100 times, or whatever number you choose to set that to)