



Extranet User Instructions

chicagonorthwest.extranet.simpleviewcrm.com


Login Screen

Meet Chicago Northwest Extranet

Email

Password

[Forgot Password?](#)



 **MEET CHICAGO NORTHWEST**


LOGIN



Home Screen

The screenshot shows the Simpleview Home Screen. At the top is a dark navigation bar with the Simpleview logo, 'Extranet' link, 'Simpleview Demo CRM Partners' text, user email 'user@simpleviewinc.com' with a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A search icon is on the far right. A vertical sidebar on the left contains icons for home, user, documents, announcements, charts, and settings. The main content area is divided into three sections. The 'At A Glance' section, highlighted with a red arrow, contains three colored boxes: a purple box for '0 Listing Views' with a list icon, an orange box for '0 Listing Click Throughs' with a hand icon, and a green box for '0 Offer Views' with a flag icon. A 'See All' link is to the right of these boxes. Below this is the 'Partner Bulletins' section with a 'Show: All Bulletins' dropdown and three bulletin items: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. The 'Post Board' section on the right lists three posts: 'Kara's Eco Hotel' (dated 07/28/2015), 'City Center Hotel and Conference Center' (dated 07/14/2015), and 'The Lauren Isely Resort' (dated 07/13/2015). Each post includes a title, date, and a brief description, with a red 'X' icon in the top right corner of each post box.

simpleview  Extranet Simpleview Demo CRM Partners user@simpleviewinc.com Logout Simpleview Hotel and Conference Center 

At A Glance  See All


0 Listing Views


0 Listing Click Throughs


0 Offer Views


Partner Bulletins




Show: All Bulletins




Partner Bulletin Test 
[View Full](#)


Weather warning 
[View Full](#)

Review Your Visitors Guide Information!!!! 
It's time to review the information that will be placed in the 2015 Visitors Guide.
[View Full](#)

Post Board 

Kara's Eco Hotel 
07/28/2015
Can anyone post a reply? I can't figure it out!
 1 

City Center Hotel and Conference Center 
07/14/2015
Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.
 0 

The Lauren Isely Resort 
07/13/2015
Multi-Partner Sharing Bulletin
Free concert on Saturday. Come hang out at the bar and enjoy local music.

At A Glance is a brief view of an Account's listings and special offers tracking. Clicking on the **See All** link to the right, engages a more detailed view of the Account and its interaction with MCNW.



Home Screen (cont'd)

The screenshot shows the Simpleview Home Screen. At the top is a dark navigation bar with the Simpleview logo, 'Extranet' link, 'Simpleview Demo CRM Partners' text, user email 'user@simpleviewinc.com' with a 'Logout' link, a dropdown menu showing 'Simpleview Hotel and Conference Center', and a search icon. On the left is a vertical sidebar with icons for home, user profile, documents, announcements, analytics, and settings. The main content area is divided into three sections. The 'At A Glance' section has three colored boxes: a purple box for '0 Listing Views' with a list icon, an orange box for '0 Listing Click Throughs' with a hand cursor icon, and a green box for '0 Offer Views' with a flag icon. A 'See All' link is to the right of these boxes. Below this is the 'Partner Bulletins' section with a 'Show: All Bulletins' dropdown and three bulletins: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. The 'Post Board' section on the right is titled with a red arrow pointing to a blue post icon. It contains three posts from 'Kara's Eco Hotel', 'City Center Hotel and Conference Center', and 'The Lauren Isely Resort', each with a date, text, and icons for replies and email.

simpleview Extranet Simpleview Demo CRM Partners user@simpleviewinc.com Logout Simpleview Hotel and Conference Center

At A Glance [See All](#)

0 Listing Views 0 Listing Click Throughs 0 Offer Views

Partner Bulletins

Show: All Bulletins

Partner Bulletin Test [View Full](#)

Weather warning [View Full](#)

Review Your Visitors Guide Information!!!!
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Post Board

Kara's Eco Hotel
07/28/2015
Can anyone post a reply? I can't figure it out!
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City Center Hotel and Conference Center
07/14/2015
Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.
0



The Lauren Isely Resort
07/13/2015
Multi-Partner Sharing Bulletin
Free concert on Saturday. Come hang out at the bar and enjoy local music.

Post Board allows a user to communicate with other properties within their destination. Clicking on the caption bubble icon allows a user to reply to a post. There is also an email icon for contacting the poster via email.



Home Screen (cont'd)

The screenshot shows the Simpleview Home Screen. At the top is a dark navigation bar with the Simpleview logo, 'Extranet' link, 'Simpleview Demo CRM Partners' text, user email 'user@simpleviewinc.com' with a 'Logout' link, a dropdown menu for 'Simpleview Hotel and Conference Center', and a search icon. On the left is a vertical sidebar with icons for home, user profile, images, announcements, analytics, and settings. The main content area is divided into three sections. The 'At A Glance' section features three colored boxes: a purple box for '0 Listing Views' with a list icon, an orange box for '0 Listing Click Throughs' with a hand cursor icon, and a green box for '0 Offer Views' with a flag icon. A 'See All' link is to the right of these boxes. Below this is the 'Partner Bulletins' section, which has a dropdown menu set to 'All Bulletins'. It lists three bulletins: 'Partner Bulletin Test' (marked with a blue and white exclamation mark), 'Weather warning' (also marked with a blue and white exclamation mark), and 'Review Your Visitors Guide Information!!!!' (marked with a blue and white exclamation mark). Each bulletin has a 'View Full' link. A red arrow points to the 'Partner Bulletins' title. To the right is the 'Post Board' section, which displays a list of posts from other users, including 'Kara's Eco Hotel', 'City Center Hotel and Conference Center', and 'The Lauren Isely Resort', each with a date and a brief description.


simpleview  Extranet Simpleview Demo CRM Partners user@simpleviewinc.com Logout Simpleview Hotel and Conference Center 

At A Glance [See All](#)


0 Listing Views


0 Listing Click Throughs


0 Offer Views


Partner Bulletins 





Show: All Bulletins





Partner Bulletin Test 
[View Full](#)



Weather warning 
[View Full](#)

Review Your Visitors Guide Information!!!! 
It's time to review the information that will be placed in the 2015 Visitors Guide.
[View Full](#)

Post Board 

 Kara's Eco Hotel 
07/28/2015
Can anyone post a reply? I can't figure it out!
1  

 City Center Hotel and Conference Center 
07/14/2015
Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.
0  

 The Lauren Isely Resort 
07/13/2015
Multi-Partner Sharing Bulletin
Free concert on Saturday. Come hang out at the bar and enjoy local music.

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



Home Screen (cont'd)

The screenshot displays the Simpleview Home Screen interface. At the top, a dark navigation bar includes the Simpleview logo, 'Extranet' link, 'Simpleview Demo CRM Partners' text, user email 'user@simpleviewinc.com' with a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center' with a search icon. A red arrow points to the 'Member Profile' icon in the left sidebar. The sidebar is teal and contains the following menu items: 'Member Profile' (with a sub-link 'Manage your Accounts'), 'Accounts', 'Contacts', 'My Benefits', and 'Invoices'. The main content area features two large colored boxes: an orange box for 'Listing Click Throughs' (0) with a hand cursor icon, and a green box for 'Offer Views' (0) with a flag icon. A 'See All' link is positioned above the Post Board. The Post Board on the right lists three posts: 'Kara's Eco Hotel' (07/28/2015) with a comment 'Can anyone post a reply? I can't figure it out!', 'City Center Hotel and Conference Center' (07/14/2015) with text about 'Industry Happy Hour', and 'The Lauren Isely Resort' (07/13/2015) with text about a 'Multi-Partner Sharing Bulletin' and a 'Free concert on Saturday'. Each post has a red close button in the top right corner.

Clicking the **Member Profile** icon displays a property's information, such as contacts, Account details and information about interaction with MCNW (same as the See All link in the At A Glance section).

Note: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.



Home Screen (cont'd)

The screenshot shows the Simpleview Home Screen. At the top is a dark navigation bar with the Simpleview logo, 'Extranet' link, 'Simpleview Demo CRM Partners' text, user email 'user@simpleviewinc.com' with a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A search icon is on the far right. On the left is a teal sidebar with a 'Collateral' section titled 'Manage your Collateral'. A red arrow points to the 'Collateral' icon in the sidebar. Below it are icons for Listings, Special Offers, Calendar of Events, Media, Occupancy, and Materials Request. The main content area has two large colored boxes: an orange one for '0 Listing Click Throughs' with a hand icon, and a green one for '0 Offer Views' with a flag icon. A 'See All' link is above the green box. To the right is a 'Post Board' with a blue edit icon. It contains two posts: 'Kara's Eco Hotel' dated 07/28/2015 with a comment 'Can anyone post a reply? I can't figure it out!' and 1 reply; and 'City Center Hotel and Conference Center' dated 07/14/2015 with text about 'Industry Happy Hour' and 0 replies.

Clicking the **Collateral** icon, displays options for listings/publication guides, special offers (coupons, deals and hotel packages), calendar of events, media (i.e. images/logos).

Note: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.



Home Screen (cont'd)

The screenshot displays the Simpleview Home Screen. At the top, a dark navigation bar contains the Simpleview logo, an 'Extranet' label, the text 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com' with a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. On the left, a teal sidebar features a home icon, a large red downward arrow, and three menu items: 'Opportunities' (with the subtext 'Manage your Opportunities'), 'RFPs', 'Media Leads', and 'Service Requests'. The main content area shows two large colored boxes: an orange one for 'Listing Click Throughs' (0) with a hand icon, and a green one for 'Offer Views' (0) with a flag icon. A 'See All' link is positioned above these boxes. To the right, a 'Post Board' section displays two pinned posts. The first post is from 'Kara's Eco Hotel' dated 07/28/2015, with the text 'Can anyone post a reply? I can't figure it out!' and 1 comment. The second post is from 'City Center Hotel and Conference Center' dated 07/14/2015, with the text 'Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.' and 0 comments. Each post has a red 'X' icon in the top right corner.

Clicking the **Opportunities** icon, displays options for RFPs sent by MCNW. Opportunities are broken in to RFPs (Meeting, Sports and Group Tour Leads) and Service Requests (Catering and Social RFPs – 10 or less sleeping rooms).

More on these options later in the presentation.



Filters and Data Grids

Before we start looking at the extranet, let's take some time to discuss settings that can be customized by each user for themselves in the extranet.

1. **Filters** – Several pages of the extranet will contain a Filters section. This section allows you to narrow down the results displayed on the page. The default filters can be adjusted by clicking the **Manage Filters*** option in the top right corner of this section.
2. **Data Grids** – When viewing pages with filter options, just below the filters is a data grid. This data grid will display a list of records matching the criteria specified in the filters. Each default column heading in a data grid can be modified by clicking the **sprocket*** icon in the top right corner of the grid.

* Remember, any adjustments made with the **sprocket** or the **Manage Filters** apply only to the person making the changes.



Filters and Data Grids

RFPs

Filters (1)

Manage Filters

Responded is:

Response Date:

-All Dates-

Lead Name contains:

Create Date:

-All Dates-

Lead ID contains:

Organization contains:

Group Type is one of:

CHOOSE

Status is one of:

OPEN, OPEN/ BID SENT

APPLY FILTERS

CLEAR FILTERS





Here is an example of the RFPs filter page. Once the desired criteria have been set in the filters, click the **Apply Filters** button to see the results. Notice the **Manage Filters** button that was mentioned previously.



Filters and Data Grids (cont'd)

ADD OFFER

Page 1 of 1 Go to Page: 1

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

Page 1 of 1 Go to Page: 1

Once the filters have been applied, the data grid will update with the matching results. Several icons may appear on the records within the grid. The appearance of these icons will depend on the page being viewed.

These icons are:

1. **Pencil** – allows editing of a record
2. **Eyeball** – allows viewing of a record
3. **Clone** – allows duplicating of a record
4. **Add Button** - Depending on the page, an Add button may appear in the top left of the data grid. When this option is available, clicking allows the addition of a new record.

Notice the **sprocket** icon that was mentioned previously.



Filters and Data Grids (cont'd)

The screenshot displays the 'RFPs' interface. On the left, a sidebar contains icons for home, user, document, megaphone, pie chart, and wrench. The main area is titled 'RFPs' and shows a 'Filters (1)' section with various filter criteria: 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', 'Group Type is one of:', 'Response Date:', 'Create Date:', 'Organization contains:', and 'Status is one of:'. Each criterion has a corresponding input field or dropdown menu. On the right, a 'Columns' menu is open, showing options for 'Account', 'Arrival (Preferred)', 'Create Date', 'Decision Date', 'Departure (Preferred)', 'Group Type', and 'Lead ID'. The 'Create Date' and 'Group Type' options are highlighted in green. Above the menu, three red arrows point to the 'Columns', 'Filters', and 'Ordering' tabs, indicating that clicking on these tabs will trigger the menu.

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

Clicking on the **sprocket** icon or the **Manage Filters** button will trigger a menu as shown here. This menu provides options for personalizing the filters, data grid columns, and ordering of each. By changing these options, changing of these options effects **ONLY** the person making the changes.



Manage Profile - Accounts

Accounts



Filters (0) [Manage Filters](#)

Account is one of:

CHOOSE ▾

APPLY FILTERS

Page 1 of 1 Go to Page: 1

Actions	Account
  ▾	Simpleview Hotel and Conference Center
<div>Manage Amenities</div> <div>Manage Meeting Space</div>	

Page 1 of 1 Go to Page: 1

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



Manage Profile - Accounts (cont'd)

SAVE

CANCEL

Sections:

- Account Information
- Phone Information
- Address Information
- New Group
- Hotel Incentive Fund
- Social Media
- General

Account: Simpleview Hotel and Conference Center

Region: Required North

Website: www.simpleviewinc.com

Phone Information

Primary:

Ext

Alternate:

Ext

When you view or edit your property 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 top left will display an Edit button. If you are editing the account , the top left will display a Save button. You must click the Save button before changes are applied!



Manage Profile - Contacts

Contacts

Filters (0) [Manage Filters](#)

Account is one of:

Contact Type is:

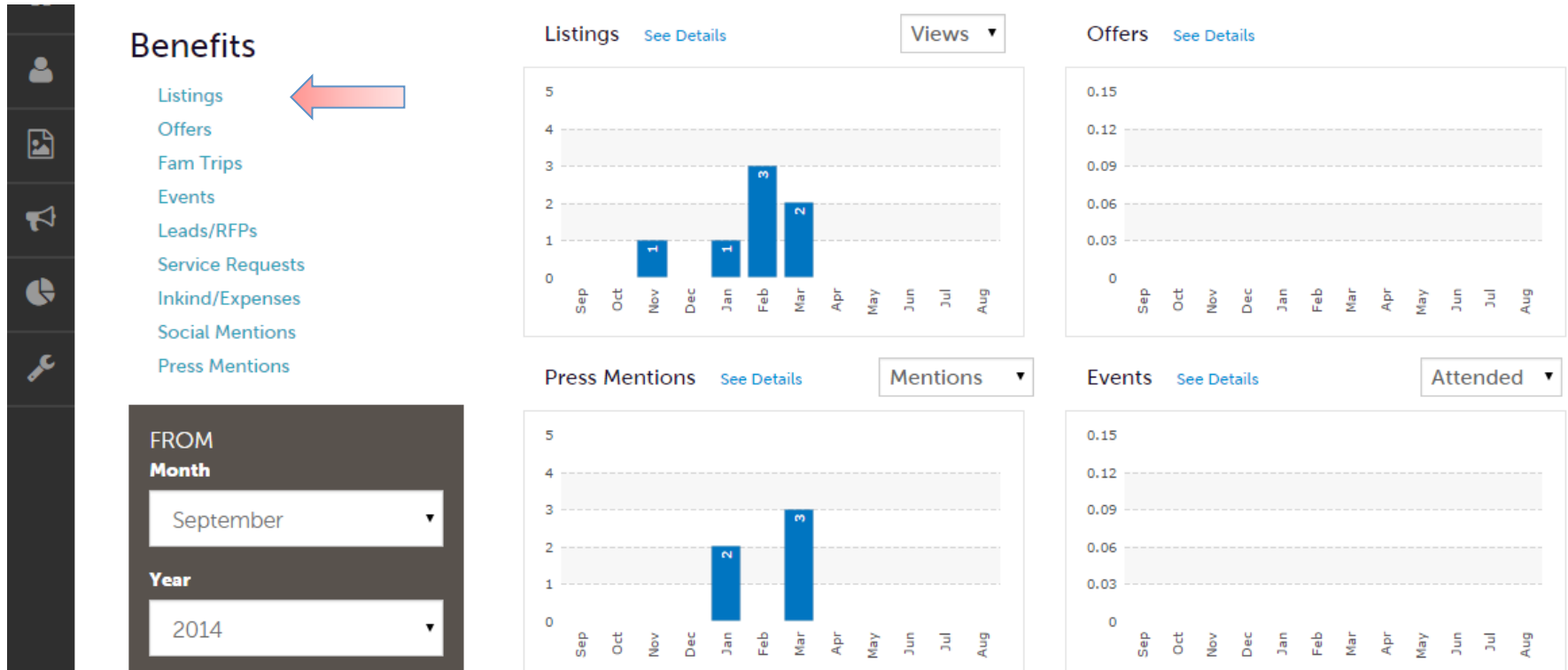
Page 1 of 1 Go to Page: 1

Actions	Full Name	Account	Title	Email	Contact Type
	Angel Berry	Simpleview Hotel and Conference Center		aberry@simpleviewinc.com	Primary
	Alena Chaika	Simpleview Hotel and Conference Center		achaika@simpleviewinc.com	Secondary

After you click the Profile icon and then Contacts, you will be presented with a list of all the contacts associated with your property. On this page, you can View a contact. Adding, removing or updating a contact will need to be done by Meet Chicago Northwest. Please contact Bren Zuschlag or Christina Mitchell at 847-490-1010.



Manage Profile - My Benefits

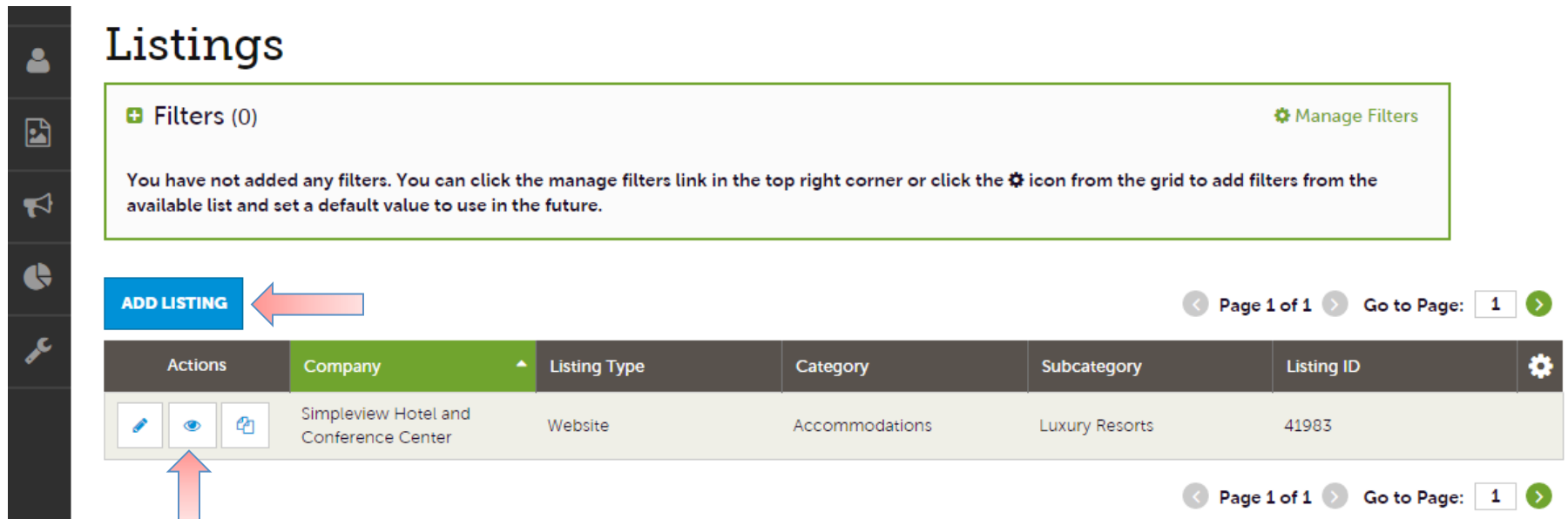


After you click the Profile icon and then My Benefits, you will be presented summary reports based on MCNW's interaction with your property. The information you see on this page is specifically related to your property.

At this time, Views/Clicks on Listings and Offers are not linked with our website.



Collateral - Listings




The screenshot shows the 'Listings' page. On the left is a dark sidebar with icons for user, image, bell, pie chart, and wrench. The main header 'Listings' is in the top left. Below it is a 'Filters (0)' section with a 'Manage Filters' link and a message: '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.' Below the filters is a blue 'ADD LISTING' button with a red arrow pointing to it. To the right of the button is a pagination control: '< Page 1 of 1 > Go to Page: 1 >'. Below this is a table with columns: Actions, Company, Listing Type, Category, Subcategory, and Listing ID. The first row contains icons for edit (pencil), view (eyeball), and clone (two documents), followed by the text 'Simpleview Hotel and Conference Center', 'Website', 'Accommodations', 'Luxury Resorts', and '41983'. A red arrow points to the eyeball icon. At the bottom right is another pagination control: '< Page 1 of 1 > Go to Page: 1 >'. A gear icon is in the top right corner of the table.




Listings

+ 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 LISTING 

< Page 1 of 1 > Go to Page: 1 >

Actions	Company	Listing Type	Category	Subcategory	Listing ID	⚙
  	Simpleview Hotel and Conference Center	Website	Accommodations	Luxury Resorts	41983	

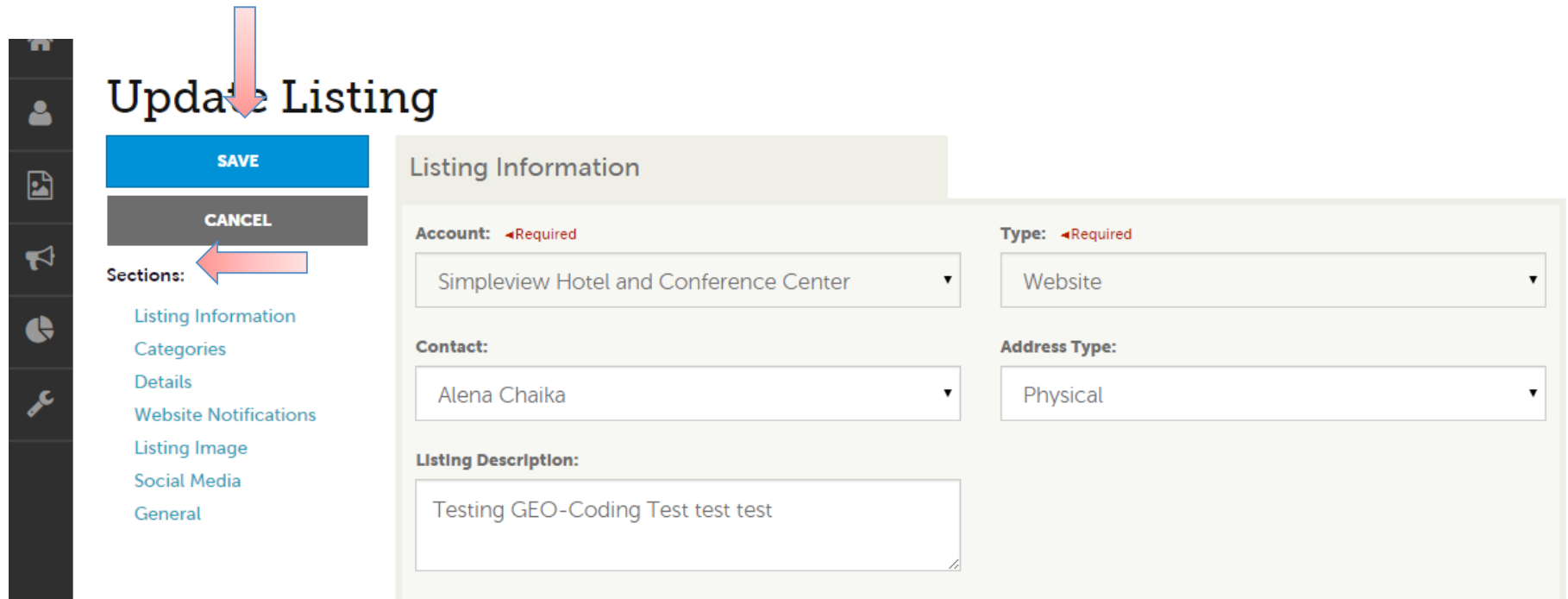
< Page 1 of 1 > Go to Page: 1 >

After you click the Collateral icon and then Listings, you will be presented with your property's listings. These listings may be website listings or publication 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.

NOTE: Add Listing and Clone will only be available if MCNW has enabled this feature.



Collateral – Listings (cont'd)



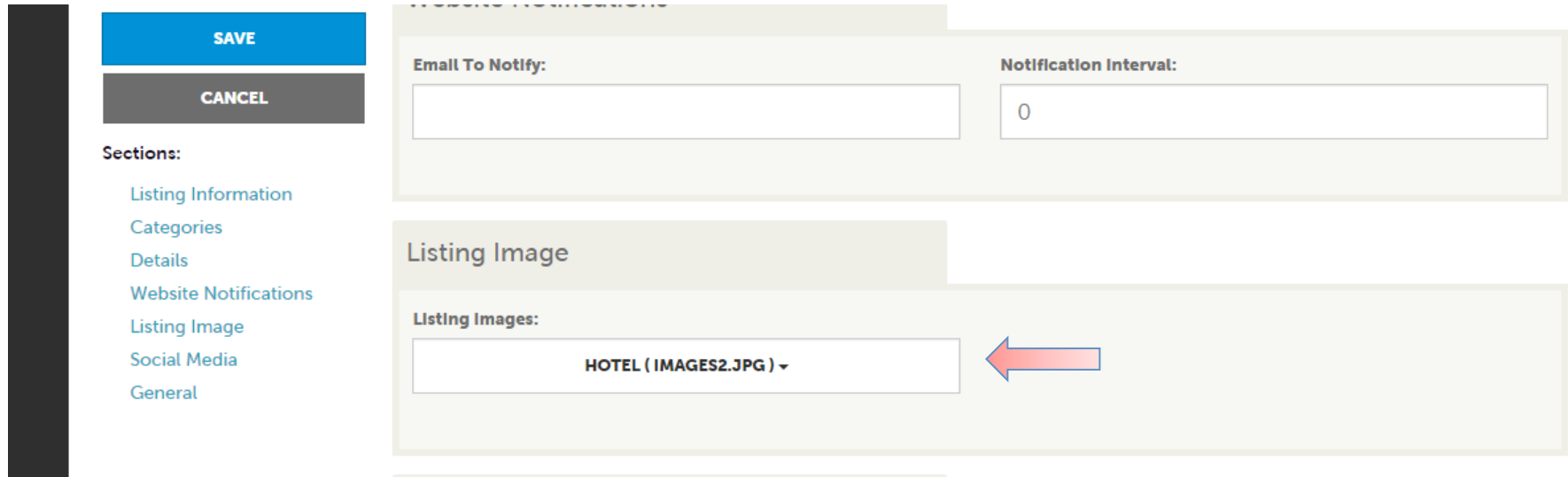
The screenshot shows a web interface for updating a listing. On the left is a dark sidebar with icons for home, user, document, announcement, analytics, and settings. The main content area is titled 'Update Listing'. Below the title are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. To the left of the form is a 'Sections:' menu with links: 'Listing Information' (highlighted in blue), 'Categories', 'Details', 'Website Notifications', 'Listing Image', 'Social Media', and 'General'. A red arrow points from the top of the page down to the 'SAVE' button. Another red arrow points from the 'SAVE' button to the 'Listing Information' link in the sidebar. The form itself is titled 'Listing Information' and contains several fields: 'Account:' (required) with a dropdown menu showing 'Simpleview Hotel and Conference Center'; 'Type:' (required) with a dropdown menu showing 'Website'; 'Contact:' with a dropdown menu showing 'Alena Chaika'; 'Address Type:' with a dropdown menu showing 'Physical'; and 'Listing Description:' with a text area containing 'Testing GEO-Coding Test test test'.

When you view, edit, or add (if enabled) a listing, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a listing, the top left will display an Edit button. If you are editing a listing, the top left will display a Save button. You must click the Save button before changes are applied!

IMPORTANT NOTE: Any edits or adding of listings will require approval from the MCNW. Upon saving your updates, MCNW will be notified of your changes/additions. Once approved, 24 hours is needed for display on MCNW website.



Collateral – Listings (cont'd)



The screenshot displays a web form for managing listings. On the left is a dark sidebar with a vertical menu. The main content area has a top section with two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' header followed by a list of menu items: 'Listing Information', 'Categories', 'Details', 'Website Notifications', 'Listing Image', 'Social Media', and 'General'. The 'Listing Image' section is highlighted in the sidebar and the main content area. This section contains a 'Listing Images:' label and a pull-down menu currently showing 'HOTEL (IMAGES2.JPG)'. A red arrow points to this menu. Above the 'Listing Image' section, there is another section with two input fields: 'Email To Notify:' and 'Notification Interval:', both containing the number '0'.

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. As mentioned previously, any edits or adding of listings will require approval from MCNW. Upon saving your updates, MCNW will be notified of your changes/additions. More on images in the Collateral – Media slide.

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

< Page 1 of 1 > Go to Page: 1

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 be presented with your property'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.



Collateral – Special Offers (cont'd)

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 of 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 will display a Save button. You must click the Save button before changes are applied! As with listings, you have the ability to attach images to your offers. Make sure to select an **Offer Category** for display on the web.


IMPORTANT NOTE: Any edits or adding of offers will require approval from MCNW. Upon saving your updates, MCNW will be notified of your changes/adds.





Collateral – Calendar of Events



Events








 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 EVENT

Page 1 of 1 Go to Page: 1

Actions	Event ID	Title	Priority	Start Date	End Date	Event Category	
  	57	Bossista	Gold	07/07/2015	07/07/2015	Family, Arts and Culture, Historical	
  	59	Simpleview Festival	Platinum	07/08/2015	07/08/2015	Sports, Family	

Page 1 of 1 Go to Page: 1

After you click the Collateral icon and then Calendar of Events, you will be presented with your property's events. 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.



Collateral – Calendar of Events (cont'd)

Update Event

SAVE

CANCEL

Sections:

- Event Information
- Event Location
- Event Dates
- Image Gallery
- General

Event Information

Account: Required
Simpleview Hotel and Conference Center

Title: Required
Simpleview Festival

Featured:
☒ YES ☐ NO

Contact:
Shawn Wilkins

Admission:

Description:
<p>This is the Simpleview Festival event description. This is the Simpleview Festival event description.

Email:

Priority: Required
Platinum

Website:

Phone:

When you view, edit, or add an event, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing an event, the top left will display an Edit button. 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!

IMPORTANT NOTE: Any edits or adding of events will require approval from MCNW. Upon saving your updates, MCNW will be notified of your changes/adds.



Collateral – Calendar of Events (cont'd)

The screenshot displays a web form for creating a calendar event. On the left is a sidebar with a dark vertical bar and a list of sections: 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The main form area has a top bar with 'SAVE' (blue) and 'CANCEL' (grey) buttons. Below this is a recurrence selector with tabs for 'One Day', 'Daily', 'Weekly' (highlighted in green), 'Monthly', and 'Yearly'. A red arrow points to the 'Weekly' tab. The 'Weekly Recurrence Options' section is active, showing 'Every 1 Week(s) on MONDAY, TUESDAY, WEDNESDAY'. A red arrow points to the days list. The 'Recurrence End' section has three options: 'No End Date' (grey), 'End after 0 occurrences' (grey), and 'End on 09/30/2015' (green). Two red arrows point to the 'End after' and 'End on' options.

SAVE

CANCEL

Sections:

- Event Information
- Event Location
- Event Dates
- Image Gallery
- General

One Day **Daily** **Weekly** **Monthly** **Yearly**

Weekly Recurrence Options

☒ Every **1** Week(s) on **MONDAY, TUESDAY, WEDNESDAY**

Recurrence End

No End Date

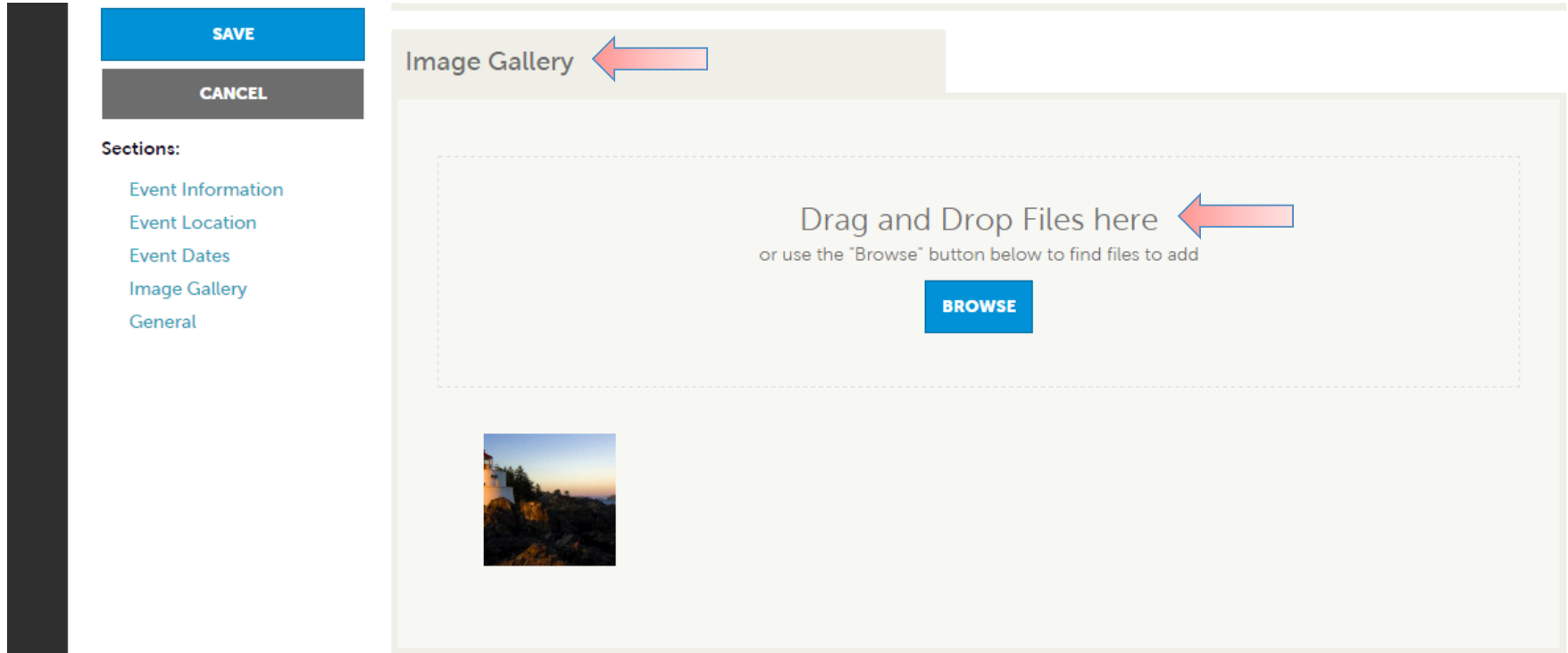
End after **0** occurrences

☒ **End on** **09/30/2015**

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.



Collateral – Calendar of Events (cont'd)



The screenshot shows a web interface for editing event collateral. On the left is a dark vertical sidebar. To its right is a panel with a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' menu with links: 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery' (highlighted), and 'General'. The main area is titled 'Image Gallery' with a red arrow pointing to it. It contains a large dashed box with the text 'Drag and Drop Files here' and 'or use the "Browse" button below to find files to add', with a red arrow pointing to the text. Below this is a blue 'BROWSE' button. At the bottom left of the main area is a small thumbnail image of a landscape at sunset.

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.



Collateral – Media

Media

Filters (0) [Manage Filters](#)





Account is one of:

CHOOSE ▾

APPLY FILTERS

ADD NEW MEDIA

Page 1 of 1 Go to Page: 1

Actions	Title	Image
  	Hotel	

After you click the Collateral icon and then Media, you will be presented with your property's images available for use on listings and special offers. 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 create a new event by clicking the Add Event button.



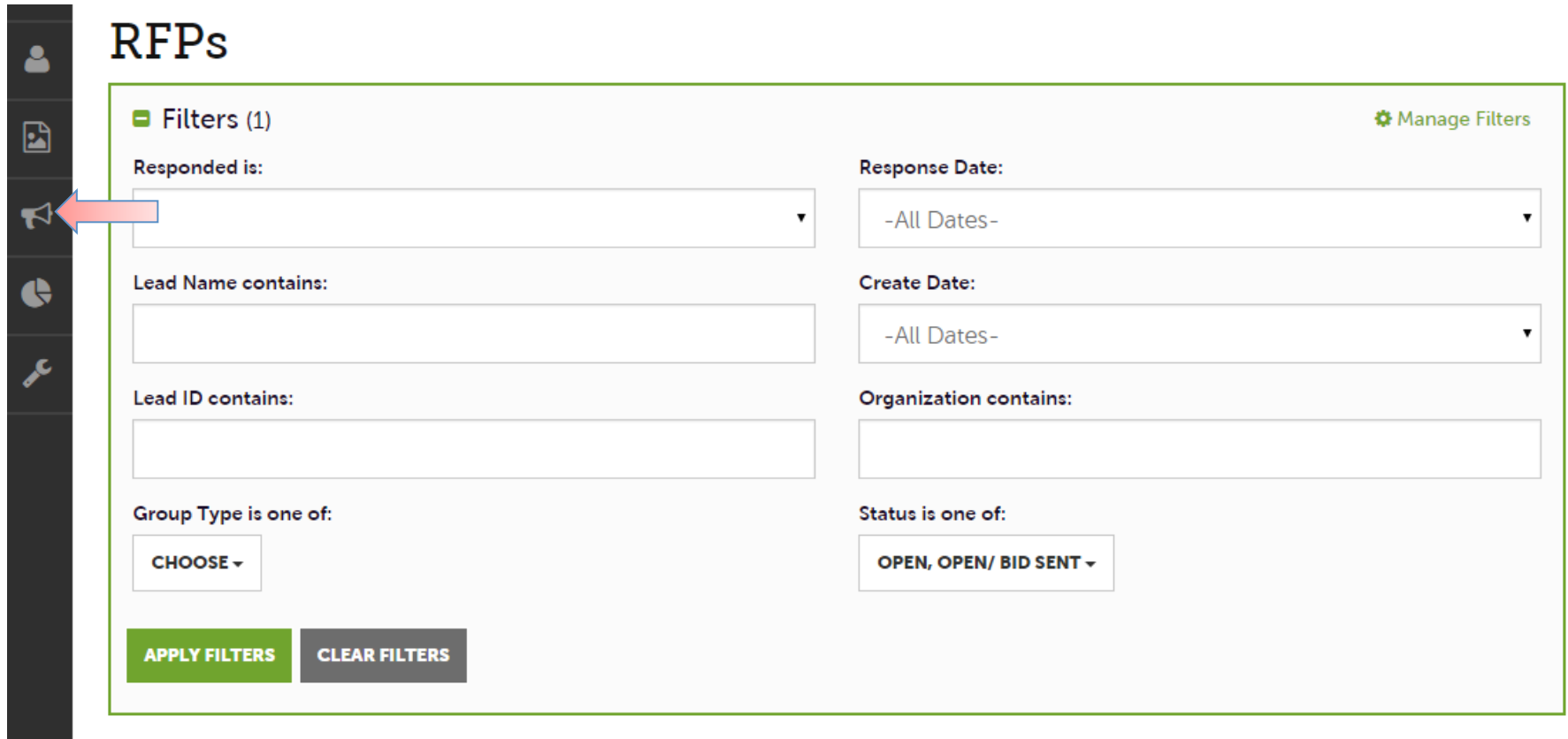
Collateral – Media (Cont'd)

The screenshot displays a web interface for managing collateral media. On the left, a dark sidebar contains a wrench icon. The main content area has a top section with a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' label followed by a link 'Media Information'. The main form area is divided into sections: 'Image' (a dropdown menu), 'Description:' (a text area), 'File:' (a large dashed box for drag-and-drop with the text 'Drag and Drop File To Page or use the "Browse" button below to find a file to add', and 'BROWSE' and 'REMOVE' buttons), and 'Listings:' (a pull-down menu with the text 'CHOOSE AMONG THE FOLLOWING...'). A red arrow points to the 'File:' section, and another red arrow points to the 'Listings:' menu.

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.



Opportunities – RFPs



The screenshot shows a web application interface for managing RFPs. On the left is a dark sidebar with icons for a user profile, a document, a megaphone (highlighted with a red arrow), a pie chart, and a wrench. The main content area is titled 'RFPs' and contains a filter grid. The grid has a header 'Filters (1)' and a 'Manage Filters' link. It is organized into two columns. The left column contains filters for 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', and 'Group Type is one of:'. The right column contains filters for 'Response Date:', 'Create Date:', 'Organization contains:', and 'Status is one of:'. Each filter has a text input field or a dropdown menu. At the bottom of the grid are two buttons: 'APPLY FILTERS' (green) and 'CLEAR FILTERS' (grey).

RFPs

Filters (1) [Manage Filters](#)

Responded is:	Response Date:
<input type="text"/>	<input type="text" value="-All Dates-"/>
Lead Name contains:	Create Date:
<input type="text"/>	<input type="text" value="-All Dates-"/>
Lead ID contains:	Organization contains:
<input type="text"/>	<input type="text"/>
Group Type is one of:	Status is one of:
<input type="text" value="CHOOSE"/>	<input type="text" value="OPEN, OPEN/ BID SENT"/>

APPLY FILTERS **CLEAR FILTERS**

After you click the RFP icon and then RFPs, you will be presented with your property's Sales and Tour Leads. The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done 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. For more on Lead statuses and their definitions see the next slide.



Opportunities – RFPs (cont'd)

LEAD STATUS DEFINITIONS




On the extranet you will see 10 different statuses in which a Lead can be in. These statuses are:

- 1. Closed / No Bid Sent:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Closed/No Bid Sent status signifies this is business your property did not bid on and the response due date has passed.
- 2. Open:** These are Leads in a tentative status that your property has not bid on and the response due date has not passed.
- 3. Open / Bid Sent:** These are Leads in a tentative status that your property has already placed a bid on and the response due date has not passed. In this status, you can update your response at any time.
- 4. Turned Down:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.
- 5. Closed / Decision Pending:** These are Leads in a tentative status that your property has placed a bid on, but the response due date has passed thus you cannot edit your response.
- 6. Closed / Lost to Another City:** These are Leads you were pursuing, but the business has been lost.
- 7. Closed Cancelled:** These are Leads where you won the business, but the group has cancelled.
- 8. Closed / Won:** These are definite Leads in which your property was selected.
- 9. Closed / Won - Properties TBD:** These are definite Leads but the group has not decided on a hotel yet.
- 10. Closed Lost:** These are definite Leads in which your property was not selected for the business.



Opportunities – RFPs (cont'd)

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	
 	12005	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 on the selected filters. As mentioned in the Filters and Data Grid section of this presentation, 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. One of the more important column headings is the Group Type. This signifies if you are looking at a Meeting Sales or Tour Lead.

To view a Lead, click on the Eyeball icon or the Lead Name



Opportunities – RFPs (cont'd)

RETURN

Sections:

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

crm@simpleviewinc.com
123.123.1234

Meeting Requirements See attached RFP for more details.

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. For notes and attachments on the Lead, these 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. For the Notes section, see next slide.



Opportunities – RFPs (cont'd)

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 scrolling to 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)

Update Response

SAVE

CANCEL

Sections:

Lead Information

Response Information

Room Information

File Attachments

Lead Information

Section Collapsed, click header to expand.

Response Information

Pursuing this lead: ◀Required

☐ NO

☐ YES

Account: ◀Required

Simpleview Hotel and Conference Center ▼

Comments: ◀Required

When adding/editing your response, you will need to tell MCNW if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option



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

The Room Information section of the response page is where you can enter the number of rooms, by room type, that your property can commit to for this Lead.



Opportunities – RFPs (cont'd)

The screenshot shows a web form for responding to RFPs. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below them is a 'Sections:' list with four items: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'SAVE' button to the top table. Another red arrow points from 'File Attachments' to the 'ATTACH FILE' button. A third red arrow points from the text 'or drag files to the page' to the same button. A red text box on the right contains the warning: '**Attached files will only be sent to MCNW. Client must be contacted directly!**'

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

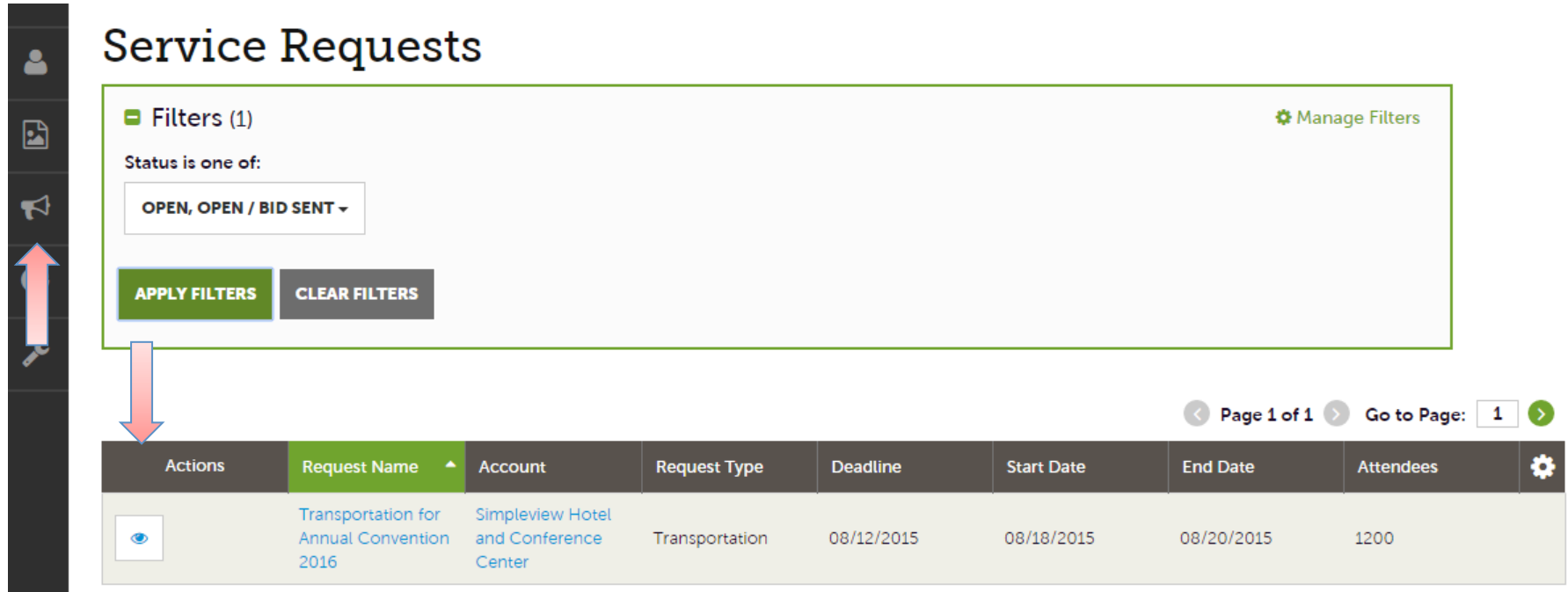
****Attached files will only be sent to MCNW. Client must be contacted directly!****

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 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 don't forget to click the save button!



Opportunities – Service Requests



The screenshot shows a web application interface for 'Service Requests'. On the left is a dark sidebar with icons for user profile, documents, announcements, and a red arrow pointing up. The main content area is titled 'Service Requests'. It features a filter section with a dropdown menu set to 'Status is one of: OPEN, OPEN / BID SENT', and buttons for 'APPLY FILTERS' and 'CLEAR FILTERS'. A 'Manage Filters' link is also present. Below the filters is a table with one data row. The table has columns for Actions, Request Name, Account, Request Type, Deadline, Start Date, End Date, and Attendees. A red arrow points from the 'APPLY FILTERS' button to the table. At the top right of the table, there is pagination information: 'Page 1 of 1' and '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 property. 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 the service request or click the name of the request.



Opportunities – Service Requests (cont'd)

The screenshot displays a web interface for managing service requests. On the left, a sidebar contains a 'RETURN' button and a list of sections: Request Information, Request Dates, Contact Information, Additional Notes and Documents, and Accounts/Responses. The main content area is divided into two sections. The top section, titled 'Request Information', contains fields for Attendees (1200), Deadline (08/12/2015), Budget (\$13,000), Location (To/From Hotel & Convention Center), and Description (Need transportation shuttles for convention running all day from 7am to 7pm). Below the Description field is a link to '2016-Annual-Convention-RFP.docx'. The bottom section, titled 'Additional Notes and Documents', contains a table with columns for File, Title, Category, and Description. The table has one row with a file icon, the title 'RFP', the category 'Spec Sheet', and the description 'See attached RFP for more details'. Red arrows point from the 'Request Information' section header to the 'Request Information' section, from the 'Additional Notes and Documents' section header to the table, and from the '2016-Annual-Convention-RFP.docx' link to the table.

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.

Depending upon MCNW's preferences, 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 MCNW 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.



Opportunities – Service Requests (cont'd)

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.

****Attached files will only be sent to MCNW. Client must be contacted directly!****

 [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. Be sure to scroll to the button and click the Update button to save your changes!



Opportunities – RFP Pickup

A part of your Lead process may be to add room Pickup information. This data can only be added to RFPs that your Property has won and if the DMO has identified you as a Pickup Manager.



Opportunities – RFP Pickup (cont'd)

RFPs

The screenshot shows a filter grid for RFPs. A red arrow points to the 'Group Type is one of' dropdown menu, which is open, showing a list of status options. Another red arrow points to the 'Closed / Won' option in the list. The filter grid includes fields for 'Responded is:', 'Response Date:', 'Lead Name contains:', 'Create Date:', 'Lead ID contains:', 'Organization contains:', and 'Property Lead Status is one of:'. The 'Property Lead Status is one of:' dropdown is currently set to '3 SELECTED'.

Filters (1) Manage Filters

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Property Lead Status is one of:



Property Lead Status is one of:

- Closed/ No Bid Sent
- Open ✓
- Open/ Bid Sent ✓
- Turned Down
- Closed/ Decision Pending
- Closed/ Lost to Another City
- Closed/ Cancelled
- Closed/ Won ✓**
- Closed/ Won - Properties TBD
- Closed/ Lost
- Assist

To see what past business is available for your Property to report pick up on, you will need to access the RFP Page. Adjust the Filter Grid to include a status of **Closed / Won** and then apply filters. To limit the results to a specific Lead, you can provide the Lead ID.



Opportunities – RFP Pickup (cont'd)

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12169	Simpleview Summit 2016	Closed/ Won	11/25/2015	Meeting	Convention	chris martin account	Simpletime z hotel	12/31/2015	04/18/2016	04/20/2016	
	10058	Karate for Kids Meeting 2015	Closed/ Won	01/01/2007	Meeting	Group	Karate for Kids	Hilton by the Shore	12/01/2015	12/15/2015	12/18/2015	

To access the Lead, click on the Eyeball icon or the Lead Name.



Opportunities – RFP Pickup (cont'd)

RETURN

Sections:

Additional Lead
Information

Lead Information

Meeting Dates

Room Summary

History/Futures

Notes

Responses

Room Data



Signage

General

Lead ID 10058

Meeting Name Karate for Kids Meeting 2015

Account Hilton by the Shore

Profile Karate Affiliation

Organization Karate for Kids

Organization 4956 N Park Ln
Address Bonham TX 75418

Contact Rita Duncan
4956 N Park Ln
Bonham TX 75418
United States

520-424-1020 (Ext. 680)
rduncan@karateforkids.com

Meeting Planner
Contact

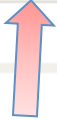
When viewing the Lead, you can skip to different sections by clicking the left navigation. In the above graphic, this is the Lead Information section; Pickup information is contained within the Room Data section.



Opportunities – RFP Pickup (cont'd)

Room Data

Add/Edit	Property	Booked Rooms by Days Out				Total Pickup
		120 Days	90 Days	60 Days	30 Days	
Daysout Pickup	Hilton by the Shore					



Click on the Pickup button to access the room block information.



Opportunities – RFP Pickup (cont'd)

SAVE

CANCEL

Sections:

[Lead Information](#)

[Room Summary](#)

[Pickup Rooms](#)



Peak Requested 23

Additional room requests/needs

Pickup Rooms

Pickup Rooms:

Pickup Avg. Daily Room Rate:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
12/20/2015	12/21/2015	12/22/2015	12/23/2015	12/24/2015	12/25/2015	12/26/2015
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The Pickup Rooms section is where you can enter the number of rooms and average daily room rate, that your property provided for this Lead.

Be sure to click the Save after you have supplied the appropriate room information.

