



Extranet User Instructions

Filters and Data Grids

Before we start looking at the extranet, let's take some time to discuss settings that can be configured by each individual user when using the extranet.

1. **Filters** – Allow users to narrow display results by changing their filter settings. Filters can be updated by clicking the **Manage Filters*** option in the top right corner of this section.
2. **Data Grids** –Columns can be configured for the individual's preferences. 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)

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

CHOOSE ▾

Response Date:

-All Dates- ▾

Create Date:

-All Dates- ▾

Organization contains:

Status is one of:

OPEN, OPEN/ BID SENT ▾

APPLY FILTERS

CLEAR FILTERS





Manage Filters



Filters and Data Grids (cont'd)

ADD OFFER

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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	

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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.



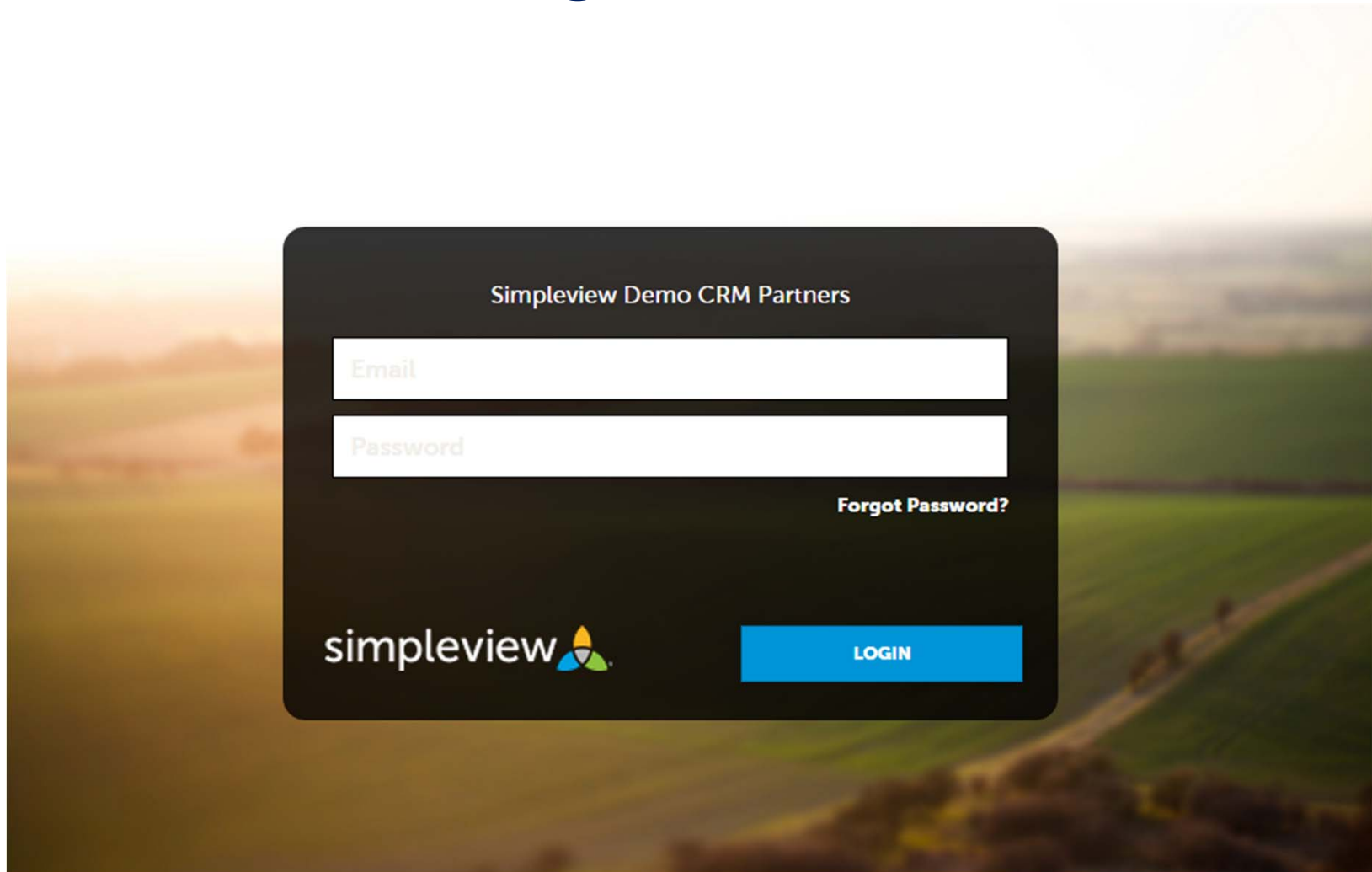
Filters and Data Grids (cont'd)

The screenshot displays the 'RFPs' interface. On the left, a sidebar contains icons for home, user, documents, alerts, charts, and settings (a sprocket icon). 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 'Manage Filters' menu is open, showing options for 'Columns', 'Filters', and 'Ordering'. The 'Filters' tab is selected, and it lists available filters: 'Account', 'Arrival (Preferred)', 'Create Date' (selected), 'Decision Date', 'Departure (Preferred)', 'Group Type' (selected), and 'Lead ID'. Each filter has a checkbox and a default value dropdown menu.

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 affects **ONLY** the person making the changes.



Login Screen




The login screen features a dark, rounded rectangular overlay on a blurred background of rolling green hills under a hazy sky. The overlay contains the text 'Simpleview Demo CRM Partners' at the top. Below this are two white input fields for 'Email' and 'Password'. To the right of the password field is a link for 'Forgot Password?'. At the bottom left of the overlay is the 'simpleview' logo, and at the bottom right is a blue 'LOGIN' button.

Simpleview Demo CRM Partners

Email

Password

[Forgot Password?](#)

simpleview 

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, 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, documents, announcements, analytics, and settings. The main content area is divided into three sections. The 'At A Glance' section, highlighted by 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 bulletins: '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 with a red close button and a comment count.

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!!!! [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 the Bureau.



Home Screen (cont'd)

The screenshot displays 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. A vertical sidebar on the left contains icons for home, user profile, documents, 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. 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 'Add Post' button. It lists three posts from properties: '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 caption bubble icon and an email icon.

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, documents, 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' section. 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 of the post.

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



Home Screen (cont'd)

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

Member Profile
Manage your Accounts

- Accounts
- Contacts
- My Benefits

0 Listing Click Throughs

0 Offer Views

See All

Post Board

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

Information!!!!
that will be

Clicking the **Member Profile** icon displays a property's information, such as contacts, Account details and information about interaction with the Bureau (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 displays the Simpleview Extranet Home Screen. The top navigation bar includes the Simpleview logo, 'Extranet' label, user information (user@simpleviewinc.com), a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A left sidebar menu is open, showing options like Listings, Special Offers, Calendar of Events, Media, Occupancy, and Materials Request. A red arrow points to the 'Collateral' icon in the sidebar. The main content area displays two large colored boxes: an orange box for 'Listing Click Throughs' (0) and a green box for 'Offer Views' (0). To the right, there is a 'Post Board' section showing two posts: 'Kara's Eco Hotel' and 'City Center Hotel and Conference Center'.

Clicking the **Collateral** icon, displays options for listings/publication guides, special offers, calendar of events, media (i.e. images), occupancy data, and materials request from the Bureau.

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'. On the left is a teal sidebar with a home icon, a red arrow pointing down, and three menu items: 'RFPs', 'Media Leads', and 'Service Requests'. The main content area has a 'Post Board' header with a 'See All' link and a blue edit icon. Below the header are two large colored boxes: an orange box for 'Listing Click Throughs' (0) with a hand icon, and a green box for 'Offer Views' (0) with a flag icon. The Post Board lists two items: 'Kara's Eco Hotel' dated 07/28/2015 with a comment 'Can anyone post a reply? I can't figure it out!' and 'City Center Hotel and Conference Center' dated 07/14/2015 with a text update about a happy hour event.

Clicking the **Opportunities** icon, displays options for RFPs sent by the Bureau. Opportunities are broken into RFPs (Meeting and Tour Leads), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs).

More on these options later in the presentation.



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
<input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Clone"/>	Angel Berry	Simpleview Hotel and Conference Center		aberry@simpleviewinc.com	Primary
<input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Clone"/>	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 Add, Edit, View, or Clone (i.e. duplicate) a contact depending upon your extranet permissions.



Manage Profile - Contacts (cont'd)

The screenshot shows a web interface for updating a contact. On the left is a vertical sidebar with icons for user profile, documents, announcements, analytics, and settings. Below the icons is a 'Sections:' list with links: 'Contact Information' (highlighted with a red arrow), 'Address Information', 'Phone Information', 'Additional Information', 'ecomm', 'Social Media', and 'General'. The main content area is titled 'Update Contact' and contains a form. At the top left of the form are 'SAVE' and 'CANCEL' buttons. The form is divided into two columns. The left column contains: 'Account:' (dropdown menu with 'Simpleview Hotel and Conference Center'), 'Last Name:' (text input with 'Berry'), 'Department:' (text input), and 'Contact Type:' (dropdown menu with 'Primary', highlighted with a red arrow). The right column contains: 'First Name:' (text input with 'Angel'), 'Full Name:' (text input with 'Angel Berry'), 'Title:' (text input), and 'Preferred Contact Method:' (dropdown menu with 'Email'). Red arrows also point to the 'SAVE' button and the 'Contact Type' dropdown.

Update Contact

SAVE

CANCEL

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- ecomm
- Social Media
- General

Contact Information

Account: ◀Required

Simpleview Hotel and Conference Center

Last Name: ◀Required

Berry

Department:

Contact Type: ◀Required

Primary

First Name: ◀Required

Angel

Full Name: ◀Required

Angel Berry

Title:

Preferred Contact Method:

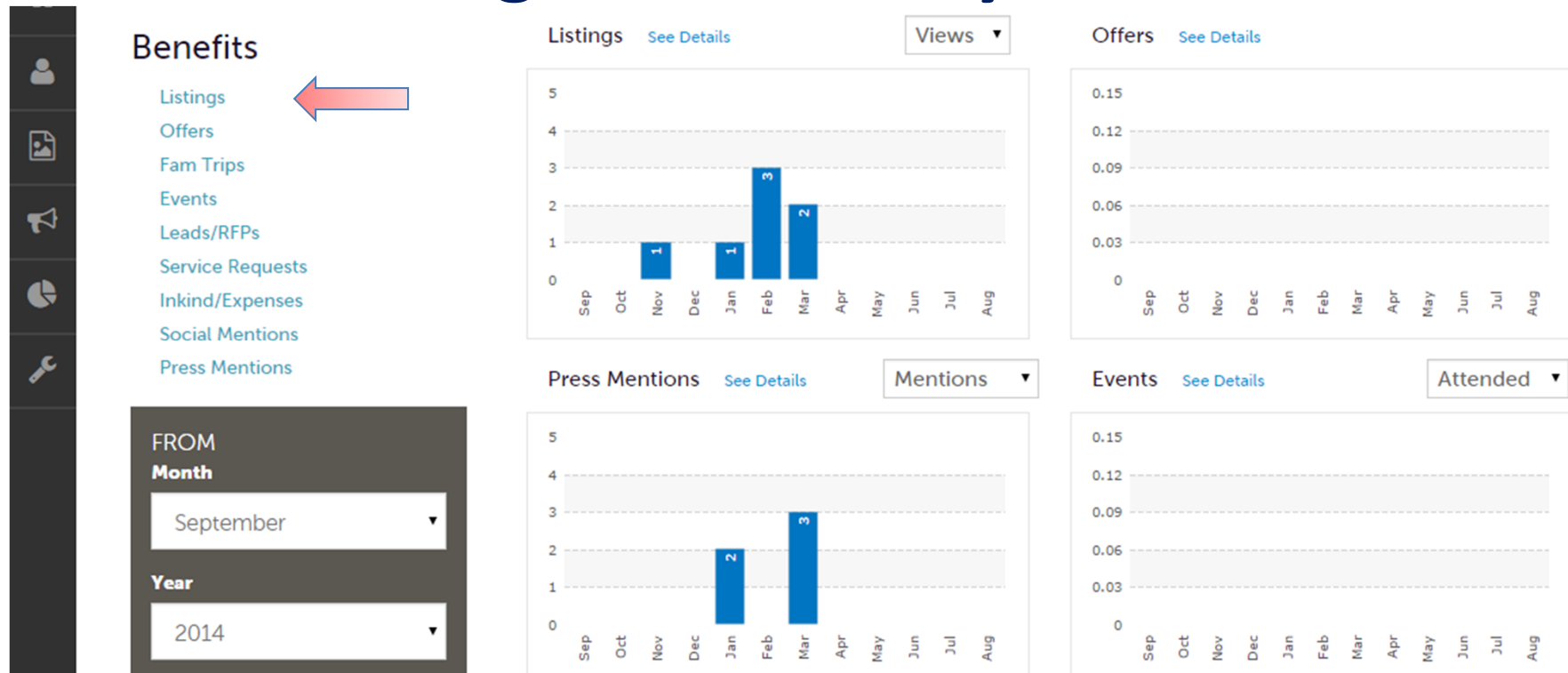
Email

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

IMPORTANT NOTE: If a contact has left your property it is your responsibility to notify the Bureau and/or change their contact type to “Inactive”.



Manage Profile - My Benefits



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



Collateral - Listings

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

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

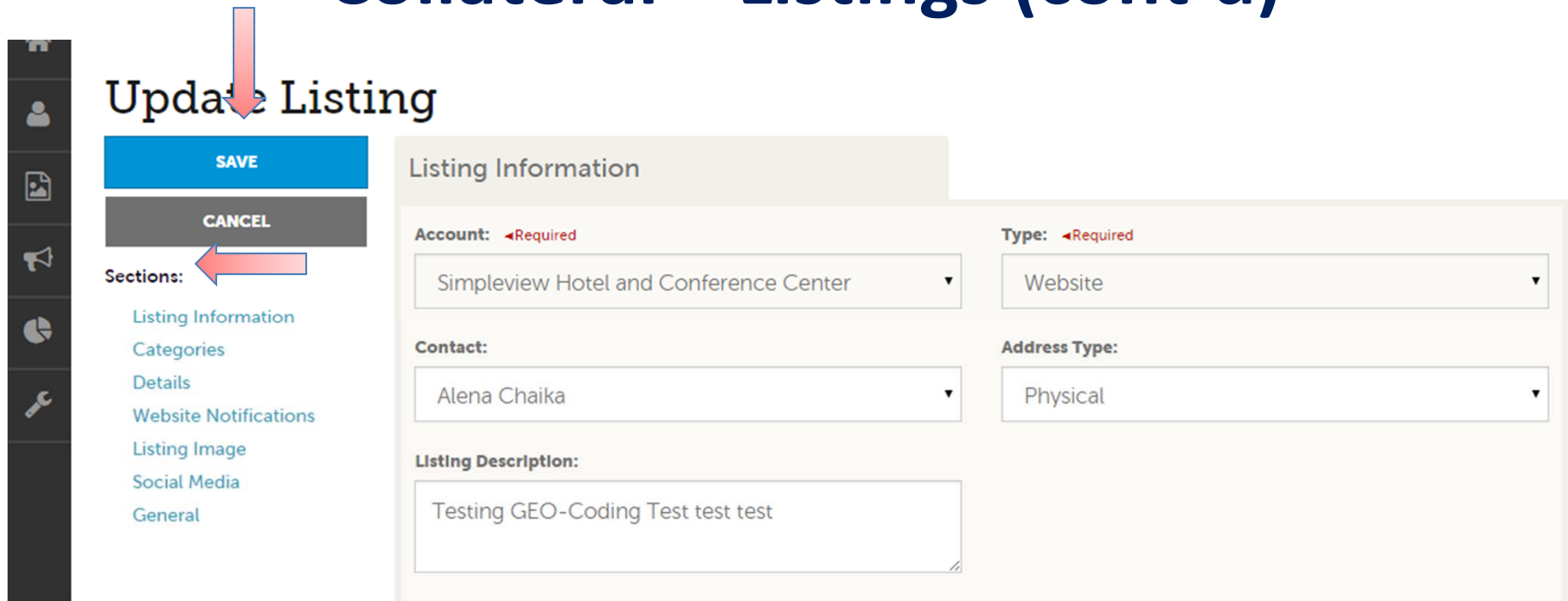
Page 1 of 1 Go to Page: 1

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 the Bureau has enabled this feature.



Collateral – Listings (cont'd)



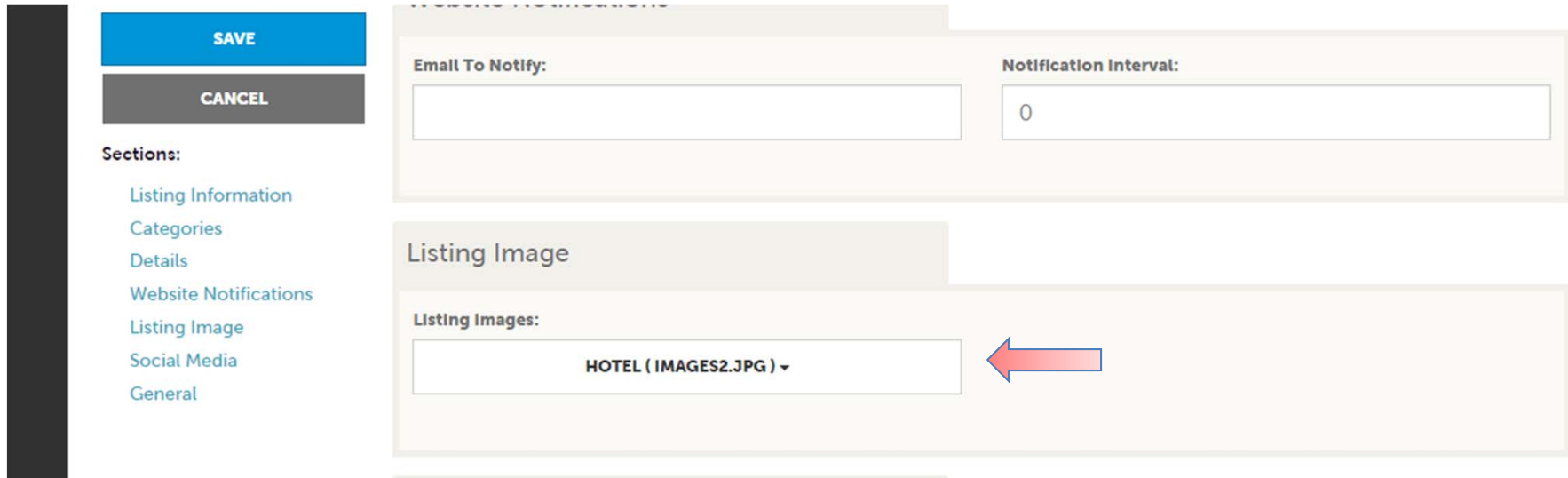
The screenshot shows a web interface for updating a listing. On the left is a dark sidebar with icons for user, document, announcement, and settings. The main content area is titled 'Update Listing' in large black font. Below the title are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button.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

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 Bureau. Upon saving your updates, the Bureau will be notified of your changes/additions.



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 'SAVE' and 'CANCEL' buttons. Below these are 'Sections:' with links for 'Listing Information', 'Categories', 'Details', 'Website Notifications', 'Listing Image', 'Social Media', and 'General'. The 'Listing Image' section is highlighted. It contains a 'Listing Images:' label and a dropdown menu currently showing 'HOTEL (IMAGES2.JPG)'. A red arrow points to this dropdown. Above the dropdown, there are fields for 'Email To Notify:' and 'Notification Interval:' with the value '0'.

When you edit or add (if enabled) 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 the Bureau. Upon saving your updates, the Bureau 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.

IMPORTANT NOTE: Any edits or adding of offers will require approval from the Bureau. Upon saving your updates, the Bureau 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

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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 – Special Calendar of Events

Update Event

SAVE **CANCEL**

Sections:

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

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. </p>

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.

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



Collateral – Special Calendar of Events

The screenshot shows a web form for creating a calendar event. On the left is a sidebar with a 'SAVE' button (blue) and a 'CANCEL' button (grey). Below these are 'Sections:' with links for 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The main form area has tabs for 'One Day', 'Daily', 'Weekly' (selected), 'Monthly', and 'Yearly'. A red arrow points to the 'Weekly' tab. Below the tabs is the 'Weekly Recurrence Options' section, which includes a green bar with 'Every 1 Week(s) on MONDAY, TUESDAY, WEDNESDAY'. A red arrow points to this bar. Below that is the 'Recurrence End' section with 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 respectively.

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 – Special Calendar of Events

SAVE

CANCEL

Sections:


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

Image Gallery

Drag and Drop Files here

or use the "Browse" button below to find files to add

BROWSE



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 media collateral. 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 and a link for 'Media Information'. The main form area is divided into sections: 'Image' with a dropdown menu, 'Description' with a text area, 'File' with a large dashed box for file upload, and 'Listings' with a dropdown menu. The 'File' section includes 'BROWSE' and 'REMOVE' buttons. The 'Listings' section has a dropdown menu with the text 'CHOOSE AMONG THE FOLLOWING...'. Red arrows point to the 'File' upload area and the 'Listings' dropdown menu.

SAVE

CANCEL

Sections:

Media Information

Image

Description:

File:

Drag and Drop File To Page
or use the "Browse" button below to find a file to add

BROWSE REMOVE

You can drag a file to the page to replace this file or use the "Browse" button

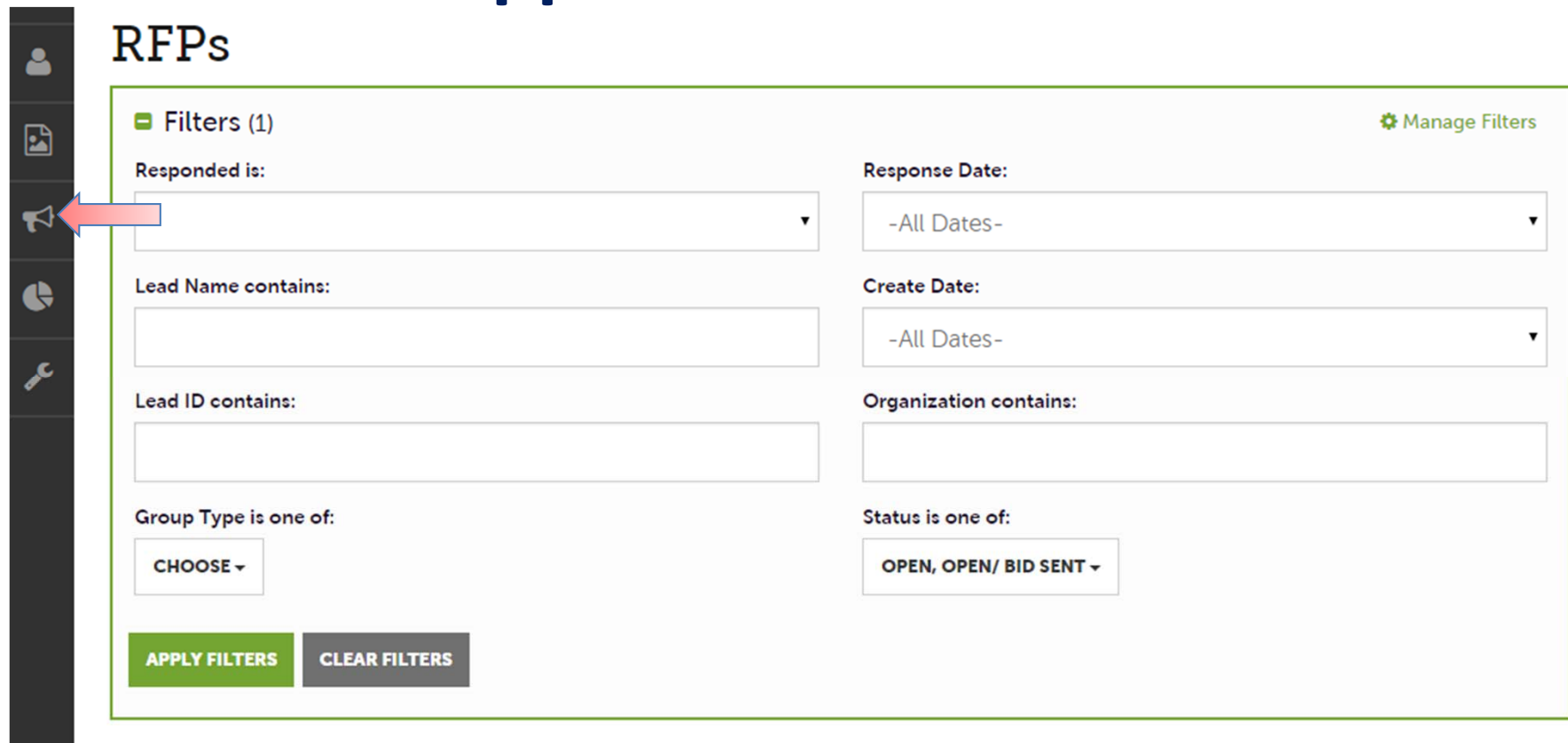
Listings:

CHOOSE AMONG THE FOLLOWING... ▾

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 interface for filtering 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 area is titled 'RFPs' and contains a 'Filters (1)' section with a 'Manage Filters' link. The filters are organized into two columns. The left column includes: 'Responded is:' with a dropdown menu; 'Lead Name contains:' with a text input field; 'Lead ID contains:' with a text input field; and 'Group Type is one of:' with a 'CHOOSE' dropdown. The right column includes: 'Response Date:' with a '-All Dates-' dropdown; 'Create Date:' with a '-All Dates-' dropdown; 'Organization contains:' with a text input field; and 'Status is one of:' with a dropdown showing 'OPEN, OPEN/ BID SENT'. At the bottom are two buttons: 'APPLY FILTERS' (green) and 'CLEAR FILTERS' (grey).

RFPs

Filters (1) [Manage Filters](#)

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Status is one of:

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 the Bureau 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 displays a web interface for responding to RFPs. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these, a 'Sections:' list includes 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'File Attachments' link to the 'File Attachments' section on the right. The 'File Attachments' section has a header 'File Attachments' and a blue 'ATTACH FILE' button. Next to the button is the text 'or drag files to the page', with a red arrow pointing to it. Below this is a light grey box containing the text 'No files have been attached'. At the top of the page, there is a table with two rows: 'Total' and 'Requested'. The 'Total' row has five columns with the value '0'. The 'Requested' row has five columns with the value '10'. A red arrow points from the 'SAVE' button to the 'Total' row of the table.

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

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments

File Attachments

ATTACH FILE or drag files to the page

No files have been attached

To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button, to browse 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 – Media Leads

All Media Leads

Filters (0) [Manage Filters](#)

Responded is: Status is one of:

Page 1 of 1 Go to Page: 1

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

By clicking the RFP icon and then selecting Media Leads, you can view Leads sent to your property by the Bureau's Media/PR department. These are usually requests for hosting travel writers. These Leads can be responded to by viewing the Lead; see next slide for responding.

Note: Media Leads function the same as Sales and Tour Leads including their statuses. See Opportunities – RFPs section for more details on this.



Opportunities – Media Leads (cont'd)

RETURN

Sections:

Opportunity Information

Responses

Notes

General

SAVE

CANCEL

Sections:

Lead Information


Response Information

File Attachments

Responses

Simpleview Hotel and Conference Center

Status Open

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

Response Information

Pursuing this lead: Required

☐ YES ☐ NO

Account: Required

Simpleview Hotel and Conference Center

Comments: Required

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



Opportunities – 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.



RFPs

Opportunities – RFP Pickup (cont'd)

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:

- 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 ID10058

Meeting NameKarate for Kids Meeting 2015

AccountHilton by the Shore

ProfileKarate Affiliation

OrganizationKarate for Kids

Organization4956 N Park Ln

AddressBonham TX 75418

ContactRita 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 25

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.

