



Extranet Member Instructions

<https://fargo-moorhead.extranet.simpleviewcrm.com>

Questions?

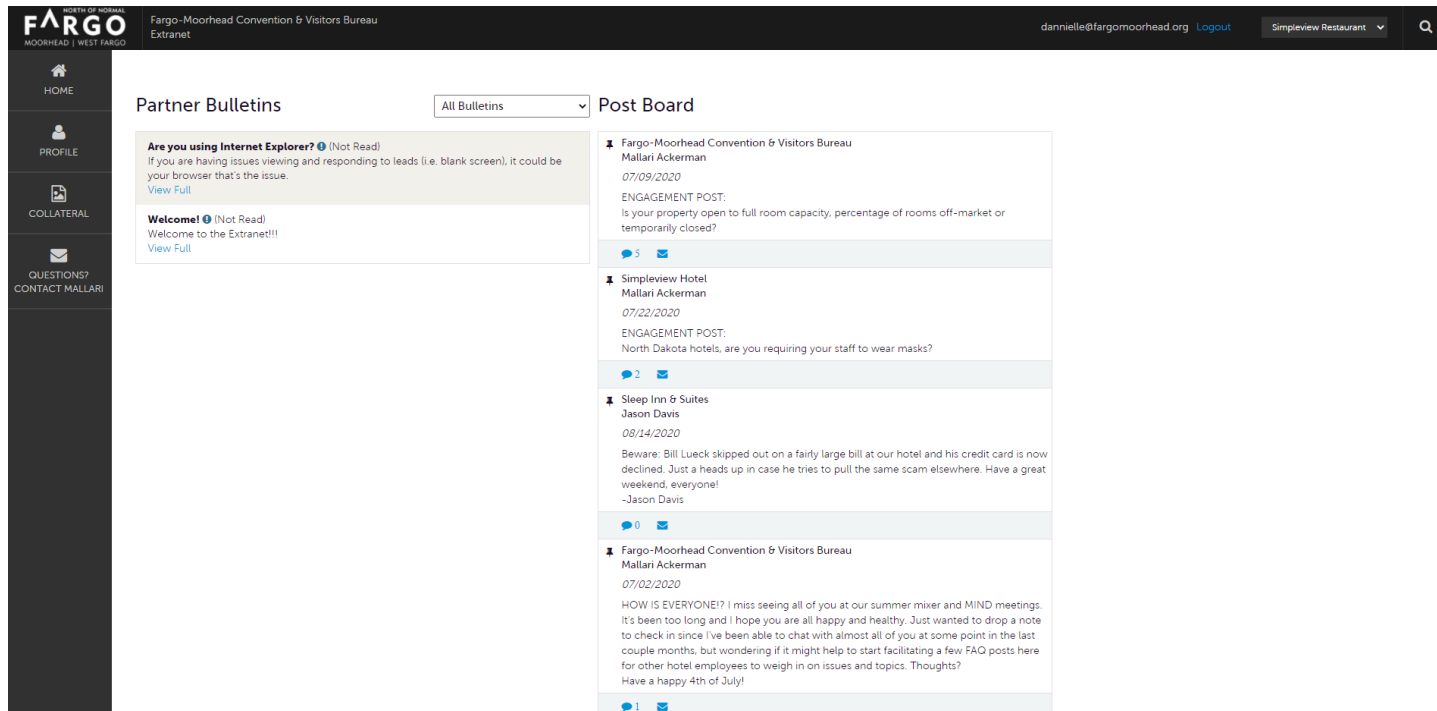
Contact Danni Melquist
701-365-4561
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Fargo-Moorhead Convention & Visitors Bureau
2001 44th Street, S
Fargo, ND 58103-7144
www.fargomoorhead.org



Member/Partner Extranet - Homepage

The extranet homepage is the first screen you will see after entering your login credentials. The features that display on this screen will be determined by the areas set in place by the CVB.

The homepage contains the following tools by default.

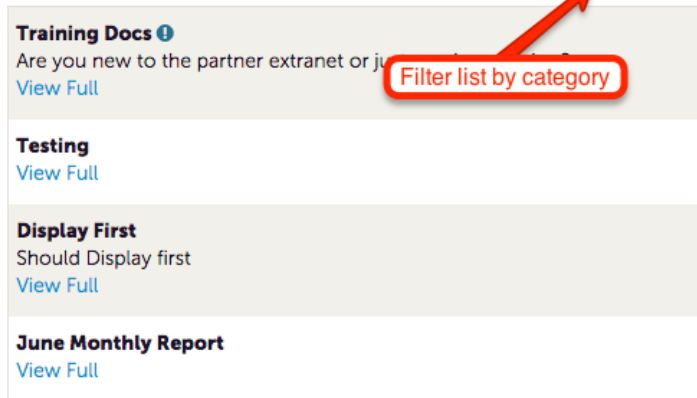


Partner Bulletins:

Partner Bulletins are documents posted by the CVB. The documents could include training documentation, requests to update your information, event invitations, etc.

Partner Bulletins

Show: All Bulletins



Training Docs
Are you new to the partner extranet or ju
[View Full](#)

Testing
[View Full](#)

Display First
Should Display first
[View Full](#)

June Monthly Report
[View Full](#)

Post Board:

The Post Board allows for partner-to-partner interactions. A user can post a new comment, reply to a comment or email the person who made the original post.

Post Board

The screenshot shows a 'Post Board' with three posts. Each post has a title, a date, and a body of text. Below each post is a row of icons: a speech bubble with a '0', an envelope, and a red square with a white 'X'. Red callout boxes with arrows point to these icons: 'Click to add a post' points to the top right icon; 'Add a comment' points to the speech bubble icon of the first post; 'Click to delete a post' points to the 'X' icon of the first post; and 'email the person who made the original post' points to the envelope icon of the second post.

Click to add a post

Scottsdale CVB
07/09/2015
We've got some sweet tunes to go with the... at
Eric's Basement Bar & restaurant*.
- Due to health department regulations we are not officially a
restaurant, but rather a "Private Kitchen."





Add a comment

Click to delete a post

Simpleview, Inc
07/09/2015
test

email the person who made the original post

Greater Lansing CVB
07/09/2015
Join us at downtown Lansing's premier club for entertainment! Offering
live music every night such as smooth jazz, smokin' blues, popular
dance tunes, hilarious interaction and never charges a cover!

- Click "" to add a post
- Click "" to add a comment to the post
- Click "" to email the person who made the original post
- Click "" to remove a post
- Users can only delete posts they placed
- System Administrators at the CVB can delete any post

Profile

If you own more than one business, you will need to toggle back and forth between the two using the drop-down menu on the top right to see details for both.

The Member Profile section has the following features:

- Account Details
- Contact Details

Accounts:

The following can be reviewed/edited from the Account Section:

- Property Information
- Phone Numbers
- Address Information

1. Click the " 👁 " to view your account details.
2. Click the " 🖋 " to edit your account details.
3. Click "Manage Amenities" to edit/update amenity information.
- 4.

Account Details:

The screenshot shows the 'Account Details' page. The sidebar on the left contains a list of sections: Property Information, Phone Information, Address Information, Image Gallery, Invoices, Social Media, Account UDF Group, and General. Below these are 'Related Details' with links for 'Manage Amenities' and 'Manage Meeting Space'. The main content area is divided into two sections: 'Property Information' and 'Phone Information'. The 'Property Information' section includes fields for ID (2), Status (Active), Company (Simpleview, Inc), Extranet Parent, Region (Downtown), Email (cfeerick@simpleviewinc.com), and Website (www.simpleviewinc.com). The 'Phone Information' section includes fields for Primary (123) 456-7890, Alternate (520) 284-1080, Toll Free 1800simpleviewinc, and Fax (800) 555-1212. A red box highlights the 'EDIT' button at the top left, with a callout 'Click to edit account information'. Another red box highlights the 'Manage Meeting Space' link in the sidebar, with a callout 'Click to jump to a section of the detail form'.

Update Account:

The account update form is broken down into the following sections. You can navigate to each section by clicking on the title of the section on the left hand navigation or by scrolling through the right-side preview area.

- **Property Information:** Company Name, Website URL, Account Region
- **Phone Information:** Phone/Fax/Toll-Free/Alternate Phone Numbers
- **Address Information:** Physical/Billing/Shipping Addresses
- **Image Gallery:** Images/Logos

The screenshot shows the 'Update Account' page. The sidebar on the left contains a list of sections: Property Information, Phone Information, Address Information, Social Media, General, and Account UDF Group. The main content area is divided into two sections: 'Property Information' and 'Phone Information'. The 'Property Information' section includes fields for Company (Simpleview, Inc), Website (www.simpleviewinc.com), and Region (Downtown). The 'Phone Information' section includes fields for Primary (123) 456-7890, Ext 123, Alternate (520) 284-1080, and Ext 22. A red box highlights the 'SAVE' button at the top left, with a callout 'Don't forget to save!'.

Property Information:

Property Information

Company: Simpleview, Inc

Region: Required DOWNTOWN

Website: www.simpleviewinc.com

Phone Information:

Phone Information

Primary: (123) 456-7890 Ext 123

Alternate: (520) 284-1080 Ext 22

Toll Free: 1800simpleviewinc

Fax: (800) 555-1212 Ext 1212

Address Information:

Address Information

Physical Address [Click to edit](#)

Address 1 3131 Mockingbird Lane
Address 2 Building 1D
Address 3 Office 46
City Tucson
State/Province AZ
Zip/Postal Code 85741
Country UNITED STATES

Billing Address [Click to edit](#)

Address 1 3131 Mockingbird Lane
Address 2 Building 1D
Address 3 Office 46
City Tucson
State/Province AZ
Zip/Postal Code 85741
Country UNITED STATES

Shipping Address [Click to edit](#)




Address 1 3131 Mockingbird Lane
Address 2 Building 1D
Address 3 Office 46
City Tucson
State/Province AZ
Zip/Postal Code 85741
Country UNITED STATES

Click save to complete the form.

Contacts

Contacts

The screenshot shows the 'Contacts' interface. At the top, there is a 'Filters (0)' section with a search box labeled 'Search For Contact by Name' and an 'APPLY FILTERS' button. Below this is an 'ADD CONTACT' button. The main area is a table with columns: Actions, Full Name, Account, Title, Email, Contact Type, and Department. Two contact records are visible: Chris Feerick (Secondary, QA) and 1234 567 (Primary). Annotations with red arrows point to the search box, the 'ADD CONTACT' button, and the 'Title' and 'Email' columns in the table header.

- Click the "  " to edit an existing contact record.
- Click the "  " to view an existing contact's details.
- You can also "clone" a contact by clicking on the "  ". This will make a duplicate of that contact.

Please note: **If a staff member leaves and a new one arrives, please make the old contact inactive and create a new contact record for the new person. You can do this by changing the "Contact Type" to Inactive.**

Update Contact:

The contact update form is broken down into the following sections. The user can navigate to each section by clicking on the title of the section in the left hand navigation or by scrolling through the right-side preview area.

- **Contact Information:** First/Last/Full Name, Title, Department, Contact Type, Preferred Method of Contact
- **Address Information:** Physical/Billing/Shipping Addresses
- **Phone Information:** Phone/Fax/Toll-Free/Alternate Phone Numbers

Contact Information:

The 'Contact Information' form contains the following fields:

- Account:** Simpleview, Inc (Required)
- Last Name:** Feerick (Required)
- Department:** QA
- Contact Type:** Secondary (Required)
- Email:** cferrick@simpleviewinc.com
- First Name:** Chris (Required)
- Full Name:** Chris Feerick (Required)
- Title:** Director of Mumbling and Grumbling
- Preferred Contact Method:** Email

Address Information:

The 'Address Information' form has three sections, each with a 'Click to edit' link:

- Physical Address:** Address 1: 3131 Mockingbird Lane, Address 2: Building 1D, Address 3: Office 46, City: Tucson, State/Province: AZ, Zip/Postal Code: 85741, Country: UNITED STATES.
- Billing Address:** Address 1: 3131 Mockingbird Lane, Address 2: Building 1D, Address 3: Office 46, City: Tucson, State/Province: AZ, Zip/Postal Code: 85741, Country: UNITED STATES.
- Shipping Address:** Address 1: 3131 Mockingbird Lane, Address 2: Building 1D, Address 3: Office 46, City: Tucson, State/Province: AZ, Zip/Postal Code: 85741, Country: UNITED STATES.

Phone Information:

Phone Information

Primary Phone: (520) 575-1154 Ext 234

Mobile Phone: (520) 575-1154

Alternate Phone: (520) 575-1154 Ext

Fax: (520) 575-1151 Ext

Home Phone: (520) 575-1154

Additional Information:

Address: [Empty]

City/State: [Empty]

Zip: [Empty]

Phone: (520) 575-1154 Ext

Gender: MYFE LEMYTE

Listings

1. Click on the "Collateral" button on the left and then click on "Listings"
2. To update your listing, click the "Edit" (pencil) icon to the left of the appropriate listing.

simpleview Extranet Logout Simpleview Hotel Q



Listings

Filters (0) Manage Filters

Pending is: [Dropdown]

APPLY FILTERS

Page 1 of 1 Go to Page: 1

Actions	Company	Listing Type	Category	Subcategory	Description
 	Simpleview Hotel	Website	Accommodations	Full Service	This is the listing description for the Simpleview Hotel

3. Change your description, add in your social media urls and click save. Your changes will go into a pending status until a representative from the approves them. You cannot alter a listing that is pending approval.

Update Listing

SAVE
CANCEL

- Sections:
- Listing Information
 - Categories
 - Details
 - Listing Image
 - Social Media
 - General

Listing Information

Account: *Required

Type: *Required

Contacts:

Address Type:

Description:

Categories

Category: *Required

SubCategory: *Required

SAVE
CANCEL

- Sections:
- Listing Information
 - Categories
 - Details
 - Listing Image
 - Social Media
 - General

TOLL FREE

Listing Image

If you have a new photo you'd like attached to your website listing, please be sure to select WEBSITE in the drop down at the bottom of this page. Meghan will approve the files and they should appear on the website within 24 hours. If the changes do not appear, please reach out to Meghan at meghan@fargomoorhead.org to report an error. Thank you!

There are no images available to choose

Social Media

Facebook URL:

Instagram URL:

Twitter URL:

YouTube URL:

General

Yelp ID:

Media:

- To add new photos to your listing, select "Collateral" from the left, click on "Media" and click on "New Media"

New Media

SAVE
CANCEL

Sections:
Media Information

Media Information

If you have a new photo you'd like attached to your website listing, please be sure to select WEBSITE in the drop down at the bottom of this page. Danni will approve the files and they should appear on the website within 24 hours. If the changes do not appear, please reach out to Danni at dannielle@fargomoorhead.org to report an error. Thank you!

Account: *Required
Simpleview Restaurant

Title: *Required

Type: *Required
Logo

Sort Order:

Description:

File: *Required

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... ▼

- Select from "Logo" or "Image" under the "type" section and select the images that fit with your listing.
- At the bottom, select the listings that the images pertain to.

Materials Request

Use the materials request button to request Visitor information materials from the CVB.

- Select "Materials Request" button under the Collateral section on the left
- Click "New Materials Request"
- Select the account you'd like to request materials for, the address should automatically fill in.
- Under "Order Detail" select the amount of each material you'd like to order
- Click Save

New Materials Request

SAVE
CANCEL

Sections:
Attached To
Order Address
Materials Request
Information
Order Detail

Attached To

Account: *Required
Simpleview Restaurant

Contacts:
Danni Melquist

Title:
Director of Coolness

Company: *Required
Simpleview Restaurant

Phone:
505.505.9333 Ext

Email:
dannielle@fargomoorhead.org

Order Address

Address 1: *Required
2001 44th St S

Address 2:

City: *Required
Fargo

State: *Required
North Dakota

Zip: *Required
58103

Country: *Required
UNITED STATES

Materials Request Information

Special Instructions:

Order Detail

Image	Product	Price	Qty	Available
	2020 Visitor Guide Box (65/box)		0	402
	2020 Dining Guide (74/box) - Order by # of guides needed		0	150