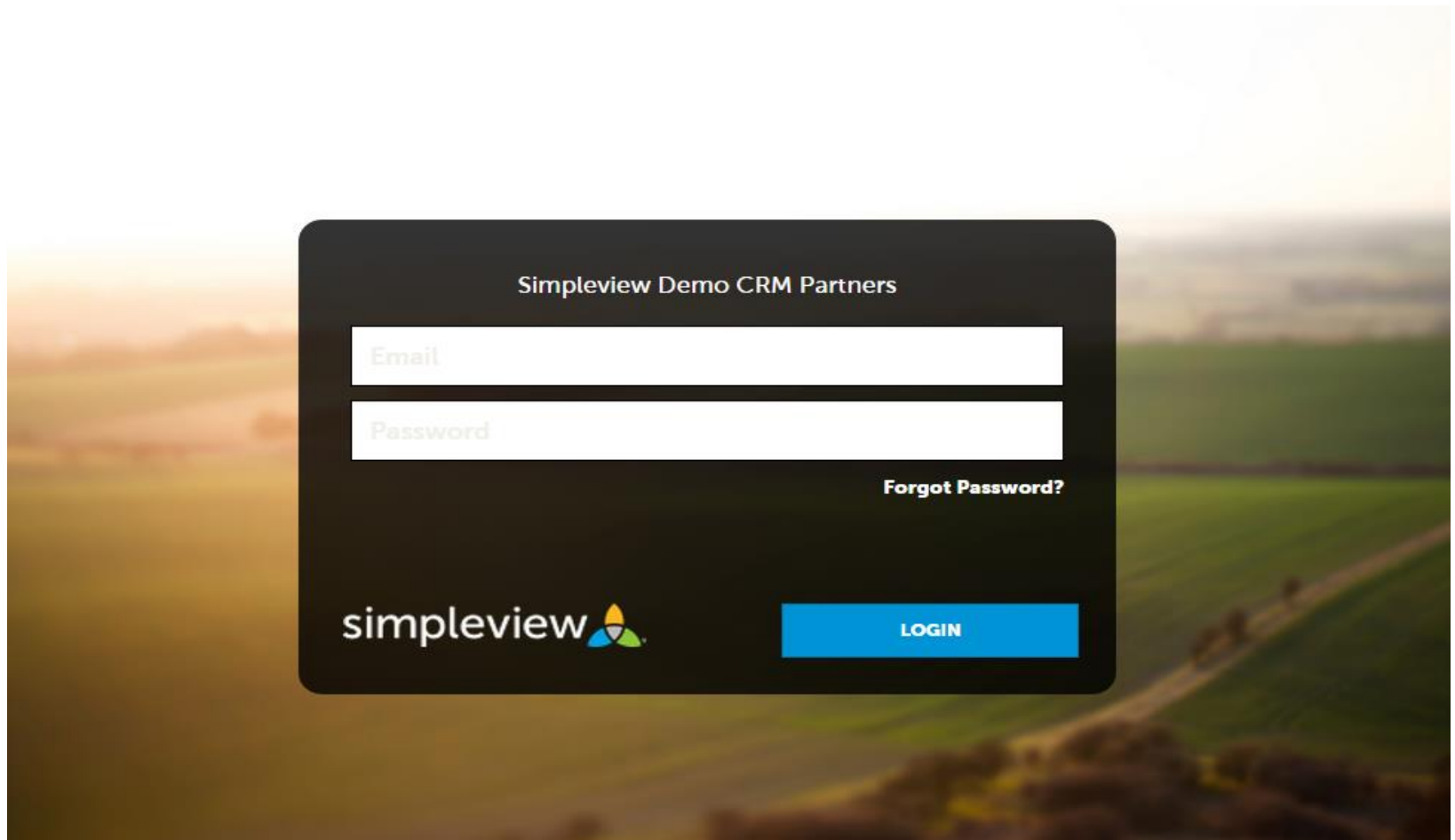


Extranet User Instructions

This document is a resource for you that provides step-by-step instructions on accessing your account and updating your information. If you have questions, please contact Becky Bickerton at 301-600-4050.



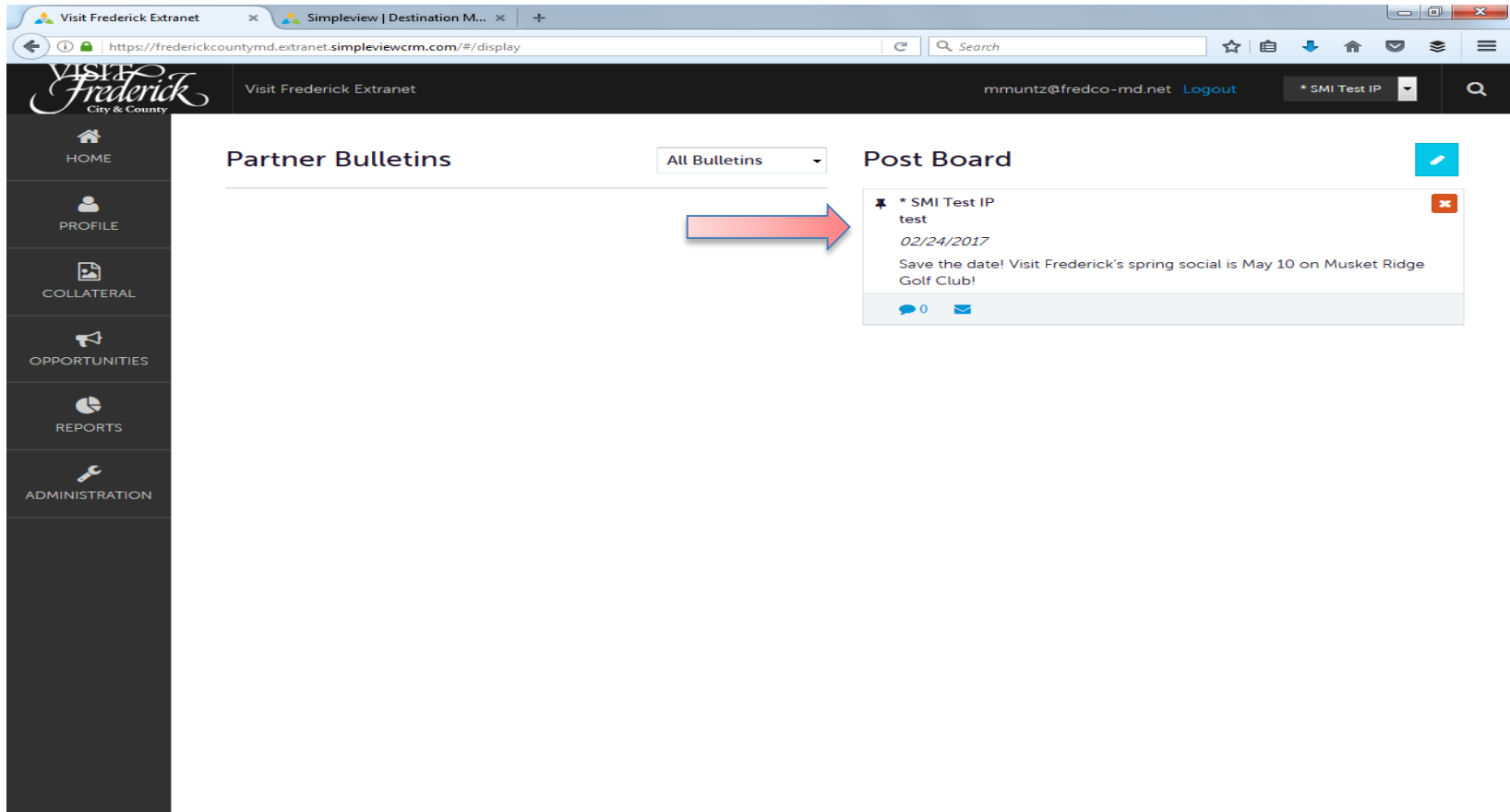
Login Screen



If you have difficulty logging in, contact Becky Bickerton at 301-600-4050.



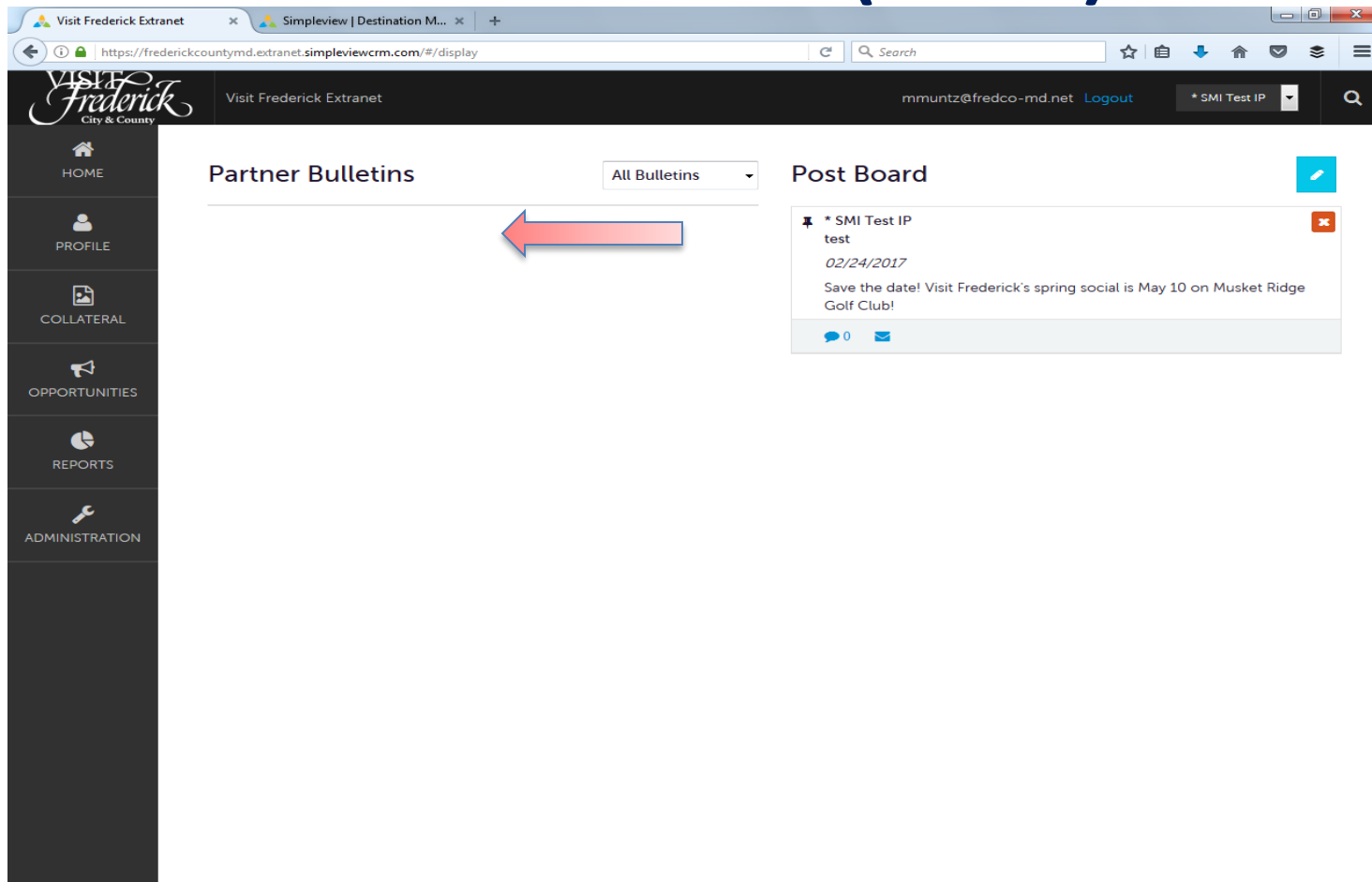
Home Screen



Post Board allows a user to communicate with other Visit Frederick partners. Clicking on the caption bubble icon allows a user to reply to a post. Example posts: job openings, press releases. These posts are visible to Visit Frederick partners only. There is also an email icon for contacting the poster via email.



Home Screen (cont'd)

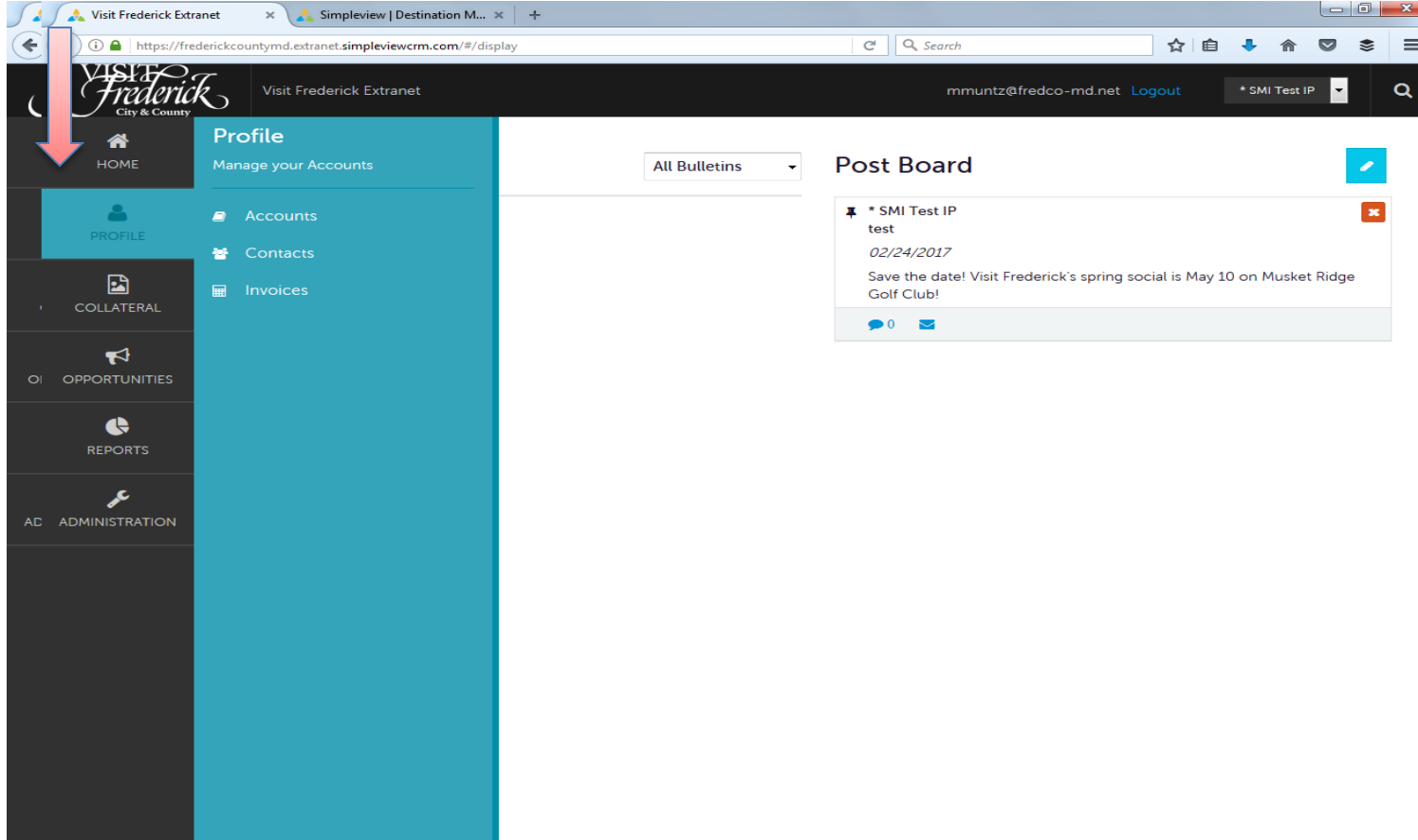


Partner Bulletins are important notices, leads, documentation, events, etc. posted by Visit Frederick. Important bulletins will be marked with a blue and white exclamation mark.

NOTE: Tour/Travel and Meeting Sales Leads will be posted under Partner Bulletins.



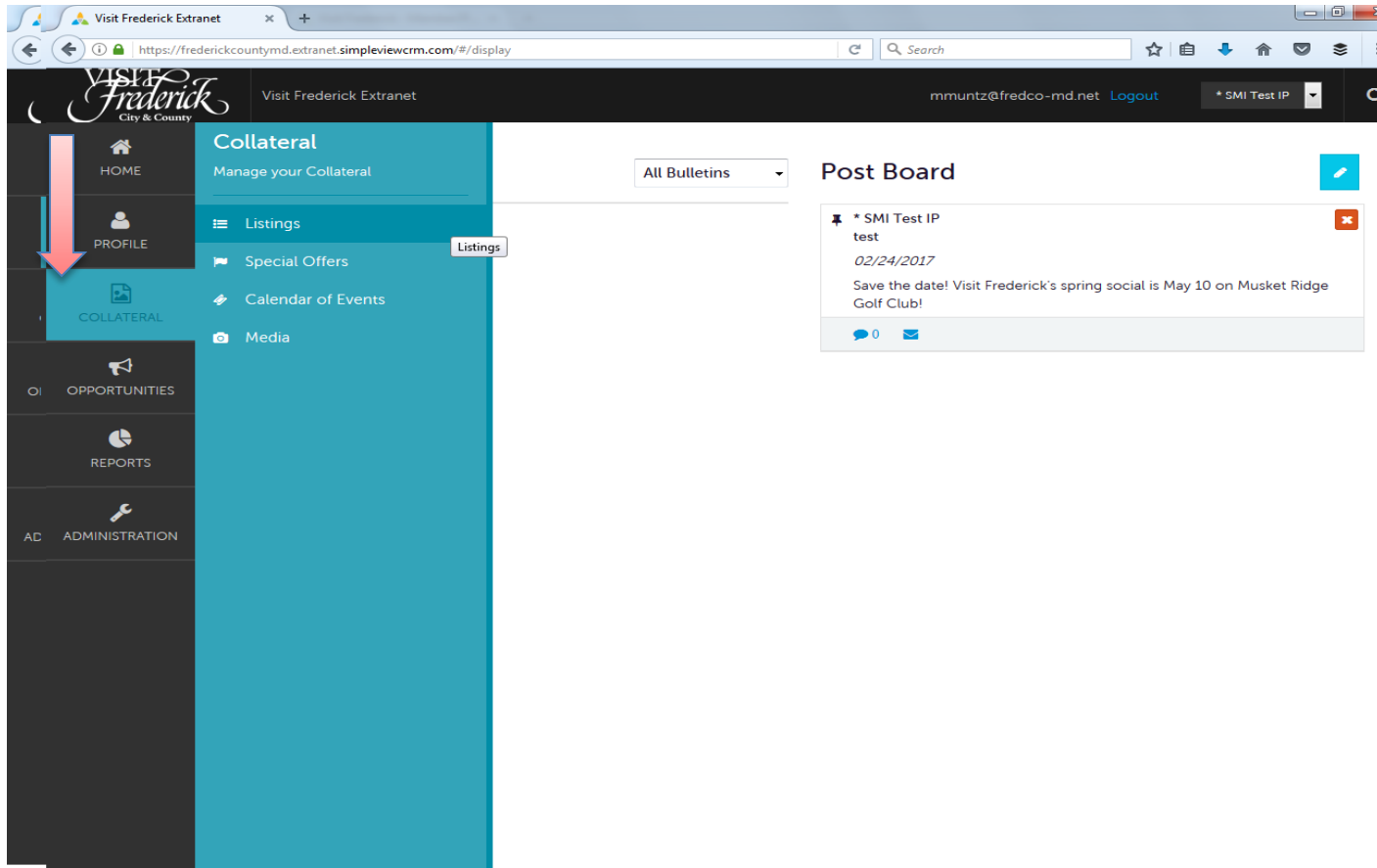
Home Screen (cont'd)



Clicking the **Profile** icon displays an organization's information, such as contacts, account details and invoices sent by Visit Frederick.



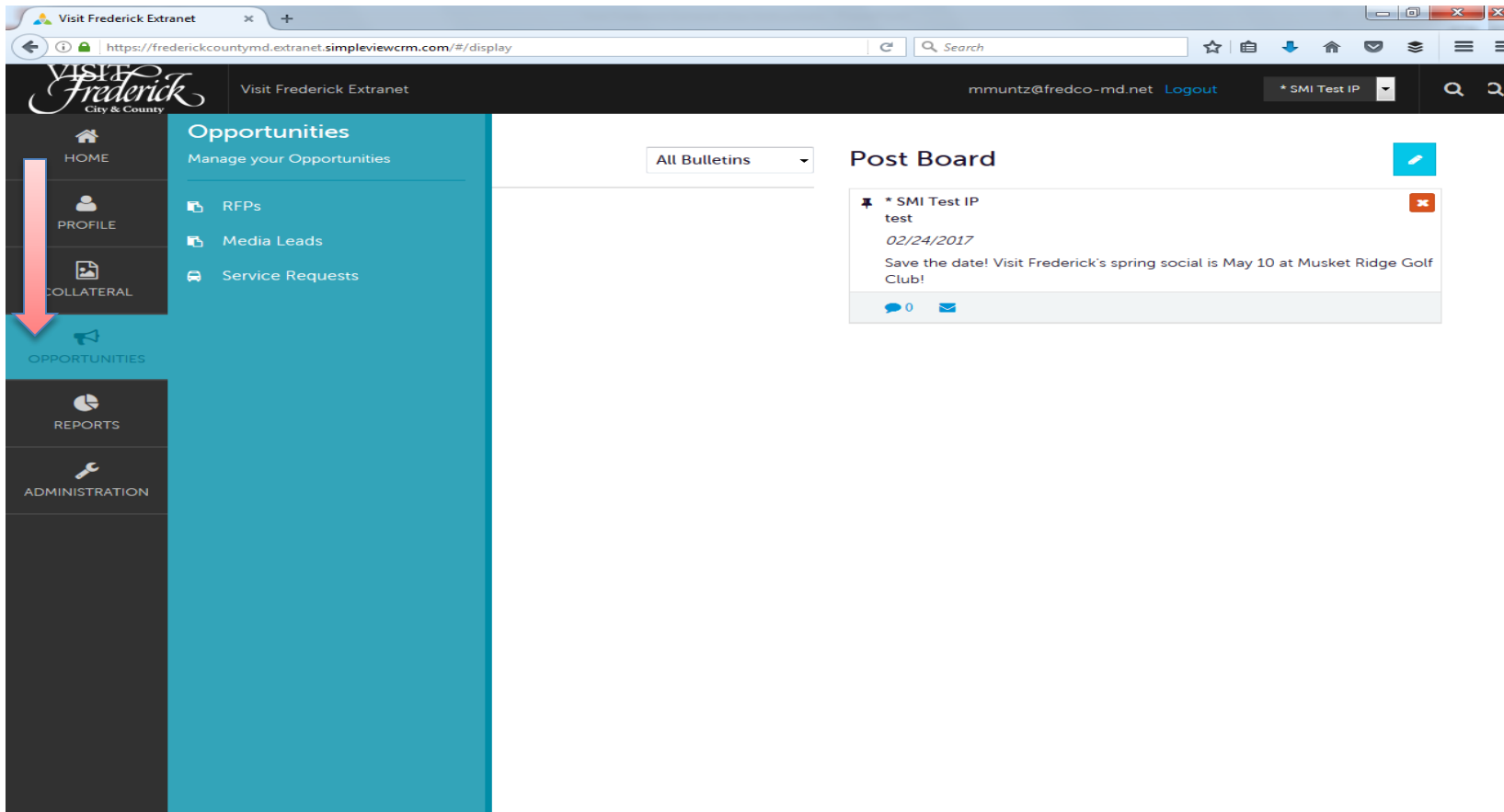
Home Screen (cont'd)



Clicking the **Collateral** icon, displays options for Listings (website and visitor guide), Special Offers, Calendar of Events, and Media (i.e. images and video).



Home Screen (cont'd)



Clicking the **Opportunities** icon, displays options for RFPs sent by Visit Frederick. Opportunities will be most relevant to lodging properties. Opportunities are broken into RFPs (Meeting and Tour Leads), Media Leads (travel writer RFPs), and Service Requests (other RFPs).



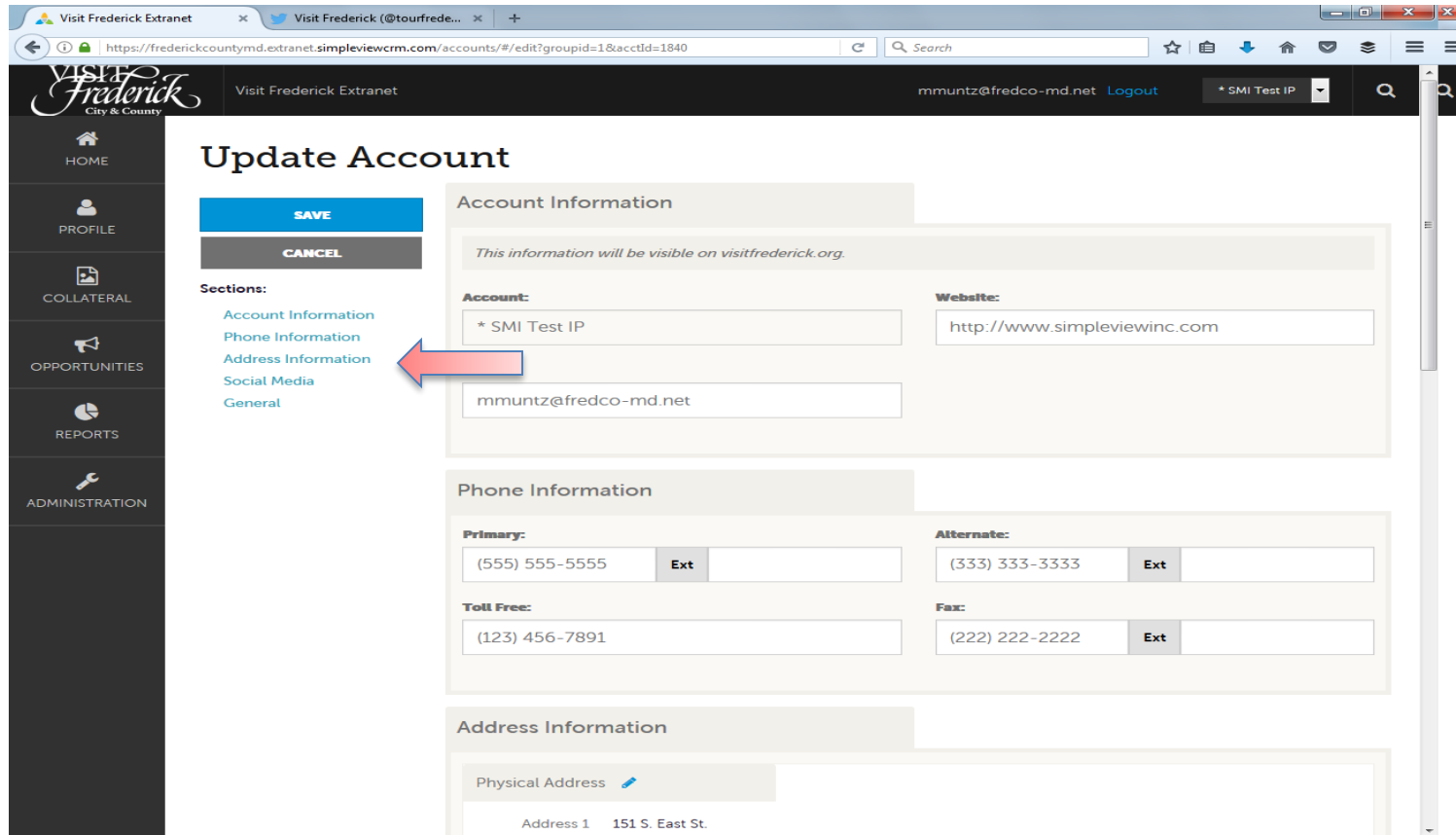
Manage Profile - Accounts

The screenshot displays the 'Accounts' management interface in the Visit Frederick Extranet. On the left is a dark sidebar with navigation options: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area has a header 'Accounts' and a 'Filters (0)' section. This section includes a 'Status is one of:' dropdown menu with a 'CHOOSE' button and an 'APPLY FILTERS' button. A red arrow points from the 'APPLY FILTERS' button to the 'Actions' column of the account list table. The table has two columns: 'Actions' and 'Account'. The 'Account' column shows '* SMI Test IP'. The 'Actions' column contains icons for editing (pencil), viewing (eyeball), and a dropdown arrow. The dropdown menu is open, showing 'Manage Amenities' and 'Manage Meeting Space'. The page also includes pagination controls showing 'Page 1 of 1' and 'Go to Page: 1'.

After you click the **Profile** icon, and then accounts, you will be presented with your account name and various actions you can perform. The **Pencil** icon will allow you to edit your account information. By clicking the **Eyeball** icon, you can view your account information. The **Down Arrow** icon will allow you to view and edit your **Amenity and Meeting Space** information. If you do not see the Down Arrow icon, these sections may not be applicable to your organization.



Manage Profile - Accounts (cont'd)



Visit Frederick Extranet

Visit Frederick (@tourfrede...)

https://frederickcountymd.extranet.simpleviewcrm.com/accounts/#/edit?groupid=1&acctid=1840

Search

Visit Frederick City & County

Visit Frederick Extranet

mmuntz@fredco-md.net Logout

* SMI Test IP

Update Account

SAVE

CANCEL

Sections:

- Account Information
- Phone Information
- Address Information
- Social Media
- General

Account Information

This information will be visible on visitfrederick.org.

Account:

* SMI Test IP

Website:

http://www.simpleviewinc.com

mmuntz@fredco-md.net

Phone Information

Primary:

(555) 555-5555 Ext

Alternate:

(333) 333-3333 Ext

Toll Free:

(123) 456-7891

Fax:

(222) 222-2222 Ext

Address Information

Physical Address

Address 1 151 S. East St.

When you view or edit your account 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 blue **SAVE** button (like in the above picture).

You must click the **SAVE** button before changes are applied!



Manage Profile - Contacts

Visit Frederick Extranet

Visit Frederick (@tourfrede...)

https://frederickcountymd.extranet.simpleviewcrm.com/contacts/#/list

Visit Frederick Extranet

mmuntz@fredco-md.net Logout

* SMI Test IP

Contacts

Filters (0) [Manage Filters](#)

Account is one of:

Contact Type is one of:

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"/>	Melissa Muntz	* SMI Test IP	Marketing and Communications	mmuntz@fredco-md.net	Primary

Page 1 of 1 Go to Page: 1

After you click the **Profile** icon and then contacts, you will be presented with a list of all the contacts associated with your account. On this page you can add, edit, view, or clone (i.e. duplicate) a contact. You can add as many contacts as you would like, but it is most important to add any people within your organization that will interact with Visit Frederick.



Manage Profile - Contacts (cont'd)

Visit Frederick Extranet

Visit Frederick (@tourfrede...)

https://frederickcountymd.extranet.simpleviewcrm.com/contacts/#/edit?contactId=3416&groupid=1&clone=0

mmuntz@fredco-md.net Logout

* SMI Test IP

Update Contact

SAVE

CANCEL

Sections:

- [Contact Information](#)
- [Address Information](#)
- [Phone Information](#)
- [Additional Information](#)

Contact Information

Account: Required

* SMI Test IP

Prefix:

First Name: Required

Melissa

Last Name: Required

Muntz

Full Name: Required

Melissa Muntz

Title:

Marketing and Communications

Contact Type: Required

Primary

Preferred Contact Method:

Email

Email:

mmuntz@fredco-md.net

Send Email:

☒ YES ☐ NO

Address Information

Physical Address

Address 1 151 S. East St.

City Frederick

State/Province MD



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 blue **SAVE** button. You must click the **SAVE** button before changes are applied!

IMPORTANT NOTE: If a contact has left your organization, it is your responsibility to change their contact type to “Inactive”.



Manage Profile - Invoices

The screenshot displays the 'Invoices' page in the Visit Frederick Extranet. The page header includes the 'Visit Frederick City & County' logo, the user's email 'mmuntz@fredco-md.net', and a 'Logout' link. A sidebar on the left contains navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area is titled 'Invoices' and features a 'Filters (0)' section with a 'Manage Filters' link. Below this is a table of invoices. The table has columns for Actions, Invoice ID, Account, Type, Invoice Date, Invoice Amount, Paid Amount, Balance Due, Payment Date, and Description. A red arrow points to the 'Filters (0)' section, and another red arrow points to the 'Actions' column. The table shows one invoice with the following details:

Actions	Invoice ID	Account	Type	Invoice Date	Invoice Amount	Paid Amount	Balance Due	Payment Date	Description
 		* SMI Test IP	Membership	02/17/2017	\$10.00	\$0.00	\$10.00		

After you click the **Profile** icon and then invoices, you will be presented with a list of invoices sent to your organization. To view the details of the invoice, you can either click the **Eyeball** icon or the **Print** icon.



Manage Profile - Invoices (cont'd)

Visit Frederick Extranet

Visit Frederick (@tourfrede...)

https://frederickcountymd.extranet.simpleviewcrm.com/invoices/#/detail?invoiceId=2

mmuntz@fredco-md.net Logout

* SMI Test IP

Invoices

RETURN

PRINT INVOICE

Sections:

- [Recipient Details](#)
- [Invoice Details](#)
- [Item Details](#)
- [Payment Details](#)

Recipient Details

Recipient Company	* SMI Test IP
Recipient Fullname	test
Recipient Title	
Recipient Email	mmuntz@fredco-md.net

Invoice Details

Invoice ID	2
Type	Membership
Description	
Invoice Date	02/17/2017
Due Date	02/17/2017
Invoice Amount	\$10.00
Paid Amount	\$0.00
Balance Due	\$10.00
Payment Date	
Payment Method	
Taxes	

You can view and print an invoice from this page. Online payments are currently not accepted. To pay your invoice, please mail a check to Visit Frederick, 151 S. East St. Frederick MD 21701 or, to pay via credit card, call Becky Bickerton at 301-600-4050.



Collateral - Listings

Visit Frederick Extranet

Visit Frederick (@tourfrede...)

https://frederickcountymd.extranet.simpleviewcrm.com/listings/#/list

Visit Frederick City & County

Visit Frederick Extranet

mmuntz@fredco-md.net Logout

SMI Test IP

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.

Page 1 of 1 Go to Page: 1

Actions	Company	Listing Type	Category	SubCategory	Listing ID
	IP	Guide	Tours	Candlelight Ghost Tour	861

Page 1 of 1 Go to Page: 1

After you click the **Collateral** icon and then listings, you will be presented with your organization's listings. These listings may be website listings or visitor guide listings. The **Pencil** icon will allow you to edit your listing information. By clicking the **Eyeball** icon, you can view your listing information.



Collateral – Listings (cont'd)

The screenshot shows a web browser window with the URL <https://frederickcountymd.extranet.simpleviewcrm.com/listings/#/edit?listingId=861&clone=0>. The page title is "Update Listing". On the left is a dark sidebar with navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The "COLLATERAL" link is highlighted. In the main content area, there are two buttons: a blue "SAVE" button and a grey "CANCEL" button. Below these is a "Sections:" list with links: Listing Information, Categories, Details, Website Notifications, and Listing Image. The "Listing Information" link is selected. The form fields include: "Account:" (dropdown menu with "* SMI Test IP"), "Type:" (dropdown menu with "Guide"), "Description:" (text area with "Candlelight ghost tours in Frederick."), and "Keywords:" (text field). A "Character Limit: 37/275" indicator is at the bottom of the description field. A red arrow points from the "SAVE" button to the "Listing Information" link in the sidebar. Another red arrow points from the "Listing Information" link to the "Account:" dropdown menu.

When you view or edit 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 blue **SAVE** button. You must click the **SAVE** button before changes are applied!

IMPORTANT NOTE: Any edits to listings will require approval from Visit Frederick. Upon saving your updates, Visit Frederick will be notified of your changes/additions.



Collateral – Listings (cont'd)




The screenshot shows a web browser window with the URL `https://frederickcountymd.extranet.simpleviewcrm.com/listings/#/edit?listingId=861&clone=0`. The page is titled "Visit Frederick Extranet". On the left, there is a sidebar with a "SAVE" button (in blue) and a "CANCEL" button (in grey). Below these buttons, under the heading "Sections:", there are links for "Listing Information", "Categories", "Details", "Website Notifications", and "Listing Image". The main content area is divided into several sections. The top section is "WEBSITE" with a radio button and a text field containing `http://www.simpleviewinc.com`. Below this is the "PRIMARY PHONE" section with a radio button and a text field containing `(555) 555-5555`. Next is the "FAX" section with a radio button and a text field containing `(222) 222-2222`. Then is the "TOLL FREE" section with a radio button and a text field containing `(123) 456-7891`. Below these is the "Website Notifications" section, which has two sub-sections: "Email To Notify:" with a large text area, and "Notification Interval:" with a text field containing the value "0". At the bottom of the form is the "Listing Image" section, which is highlighted with a red arrow. This section contains a note: "These images may be visible on visitfrederick.org."

When you edit a listing, you can select one or multiple images to associate to the listing by selecting the **Listing Images** pull down menu. Upon saving your updates, Visit Frederick will be notified of and approve or deny your changes/additions.



Collateral – Special Offers

The screenshot shows the 'Visit Frederick Extranet' interface. The top navigation bar includes the site logo, user information (mmuntz@fredco-md.net), and a 'Logout' button. The left sidebar contains navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area is titled 'Offers' and features a 'Filters (0)' section with a 'Manage Filters' link. Below this is an 'ADD OFFER' button. A table lists offers with columns: Actions, Offer Title, Redeem From, Redeem To, Post From, Post To, and Pending. The first offer is 'Buy One Get One Free' with a status of 'Yes'. A red arrow points to the 'ADD OFFER' button, and another red arrow points to the 'Eye' icon in the Actions column.

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending
  	Buy One Get One Free					Yes

After you click the **Collateral** icon and then **Special Offers**, you will be presented with your organization'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)

Visit Frederick Extranet

https://frederickcountymd.extranet.simpleviewcrm.com/specialoffers/#/edit

Visit Frederick Extranet

mmuntz@fredco-md.net Logout

* SMI Test IP

New Offer

SAVE

CANCEL

Sections:

- Offer Information
- Offer Image
- Offer Dates
- Offer Categories
- Offer Listings
- General

Offer Information

Account: Required

* SMI Test IP

Offer Title: Required

Buy One Get One Free

Offer Link:

http://www.simpleviewinc.com

Offer Text:

Buy one ticket at full price and get one ticket free.




Offer Image

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 blue **SAVE** button. You must click the blue **SAVE** button before changes are applied! As with listings, you have the ability to attach images to your offers. Visit Frederick will approve or deny your offer after it has been saved.



Collateral – Calendar of Events

The screenshot shows the 'Events' page in the Visit Frederick Extranet. The page has a dark sidebar on the left with navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area is titled 'Events' and includes a 'Filters (0)' section with a 'Manage Filters' link. Below this is an 'ADD EVENT' button and a table of events. The table has columns: Actions, Event ID, Title, Rank, Start Date, End Date, and Event Category. The first event listed is 'Launch Party' with Event ID 7333, Rank 'One Time Event', and dates '04/27/2017'. The 'Actions' column for this event contains three icons: a pencil (edit), an eye (view), and a clone (duplicate). A red arrow points to the 'ADD EVENT' button, and another red arrow points to the 'Eye' icon.

Actions	Event ID	Title	Rank	Start Date	End Date	Event Category
  	7333	Launch Party	One Time Event	04/27/2017	04/27/2017	Food

After you click the **Collateral** icon and then **Calendar of Events**, you will be presented with your organization'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)

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. Upon saving your updates, Visit Frederick will be notified of and approve or deny your changes/additions.



Collateral – Media

Media

Filters (0) [Manage Filters](#)





Account is one of:

CHOOSE ▾

APPLY FILTERS

ADD NEW MEDIA

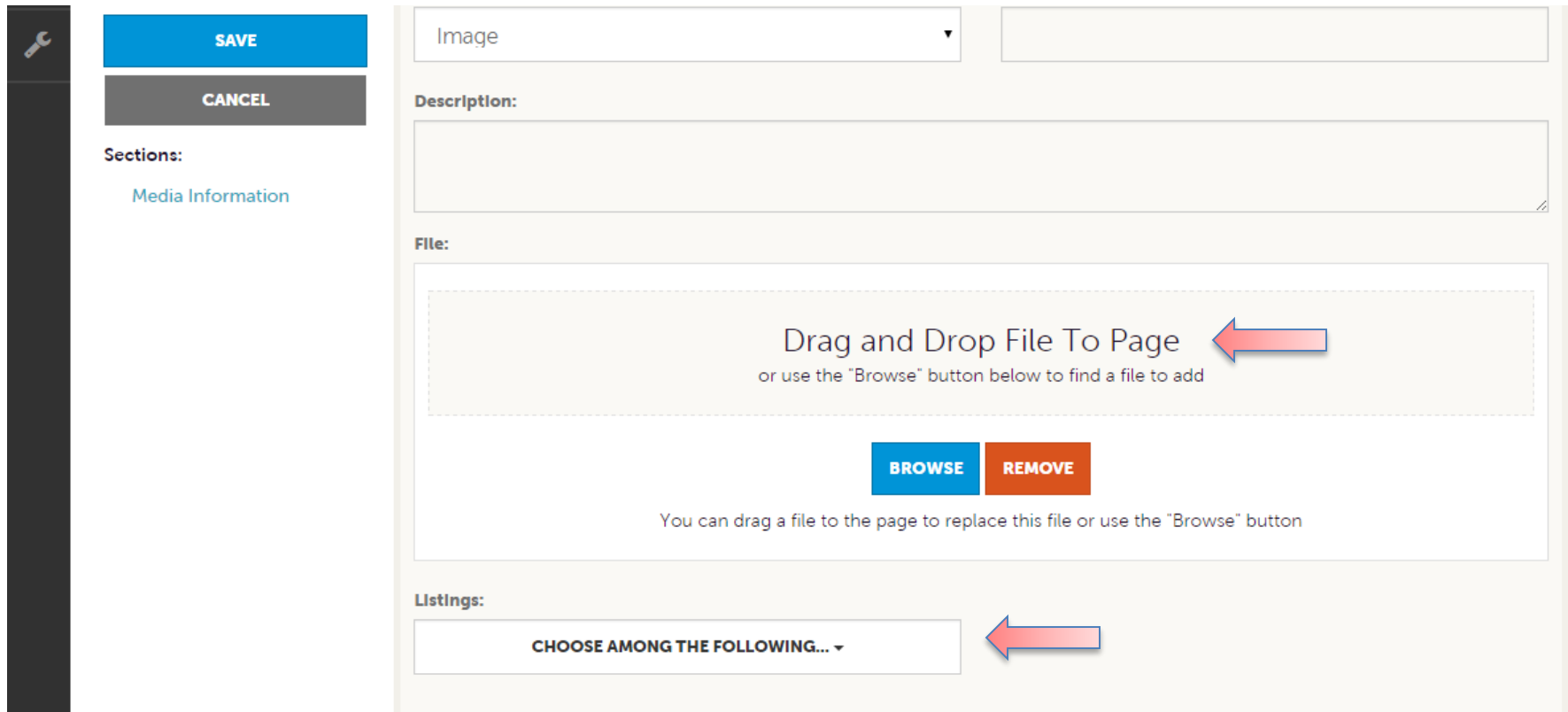
Page 1 of 1 Go to Page: 1

Actions	Title	Image
  	Hotel	

After you click the **Collateral** icon and then **Media**, you will be presented with your organization'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.



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 followed by a link '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 drag-and-drop, and 'Listings' with a dropdown menu. The 'File' section includes 'BROWSE' and 'REMOVE' buttons. A red arrow points to 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**. We suggest that you use photos of your location rather than an organizational logo. Photos best represent your visitor experience!



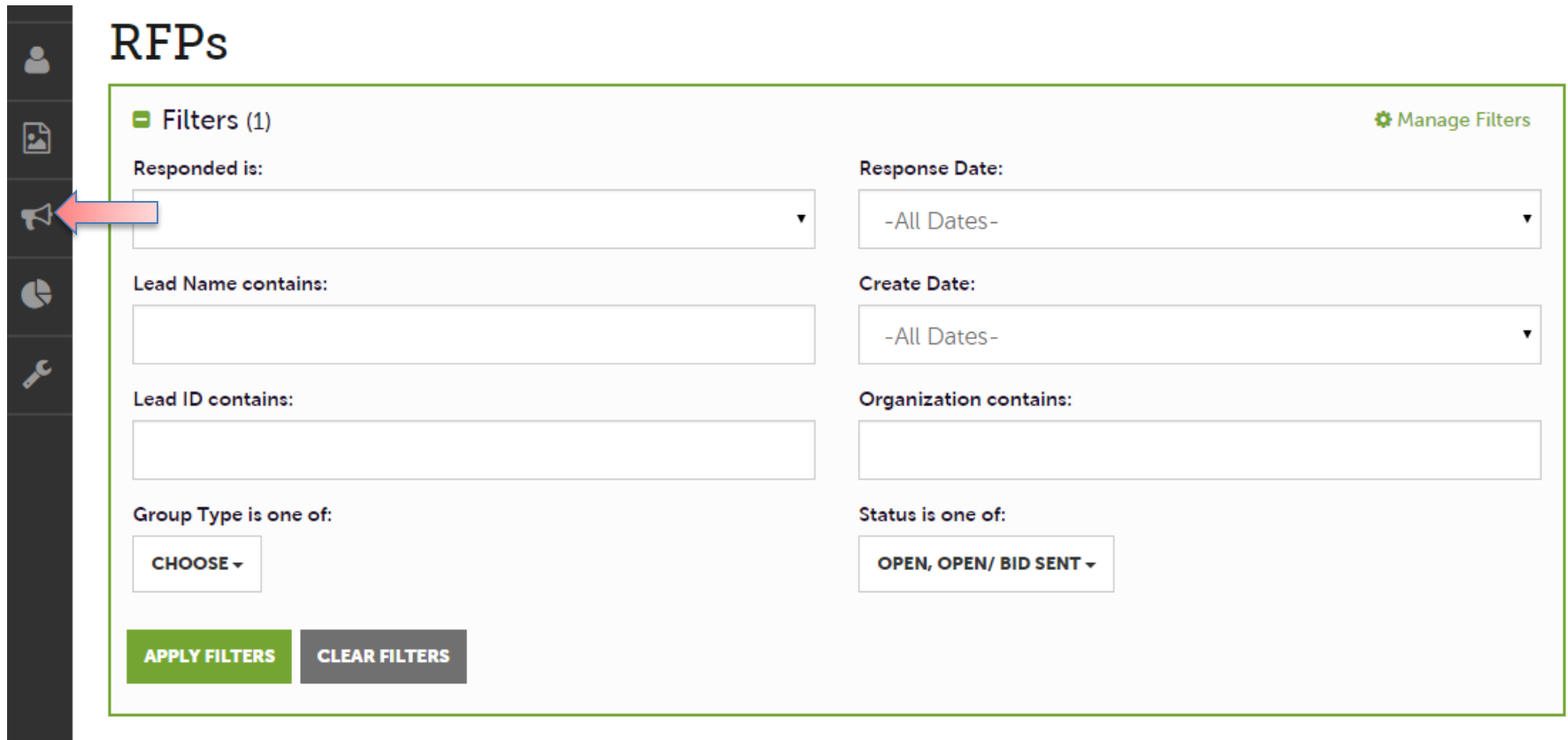
Congratulations!
**You have successfully updated
your Account information.**

**To learn about Lead Retrieval
from the Extranet, *please
continue to the next slide.***

(This may not apply to all partners)



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, documents, 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 of filter fields. The left column includes 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', and 'Group Type is one of:'. The right column includes 'Response Date:', 'Create Date:', 'Organization contains:', and 'Status is one of:'. Each field is 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:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Status is one of:

APPLY FILTERS **CLEAR FILTERS**

After you click the **RFP** icon and then **RFPs**, you will be presented with your organization'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 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: >

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. You can change these data grid column headings to your preference by clicking the **Gear** 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)

The screenshot displays a CRM interface for viewing RFP details. On the left, a sidebar contains a 'RETURN' button and a list of sections: Lead Information, Meeting Dates, Additional Lead Information, Room Summary, History/Futures, Notes, Responses, Signage, General, and Room Data. A red arrow points to 'Lead Information'. The main content area shows the following details:

- crm@simpleviewinc.com
- 123.123.1234
- Meeting Requirements: See attached RFP for more details. (Red arrow points to this text)
- Schedule of Events
- Action Requested
- Comments
- Competitive Sites
- Meeting Specs: 2016-Annual-Convention-RFP.docx (Red arrow points to this attachment)
- 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 Visit Frederick 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 corresponding 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 another 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, a table shows a summary of responses.

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

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:

[APPLY FILTERS](#)

Page 1 of 1 Go to Page:

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 Visit Frederick. 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

Account: Required

☐ YES

☐ NO

Simpleview Hotel and Conference Center

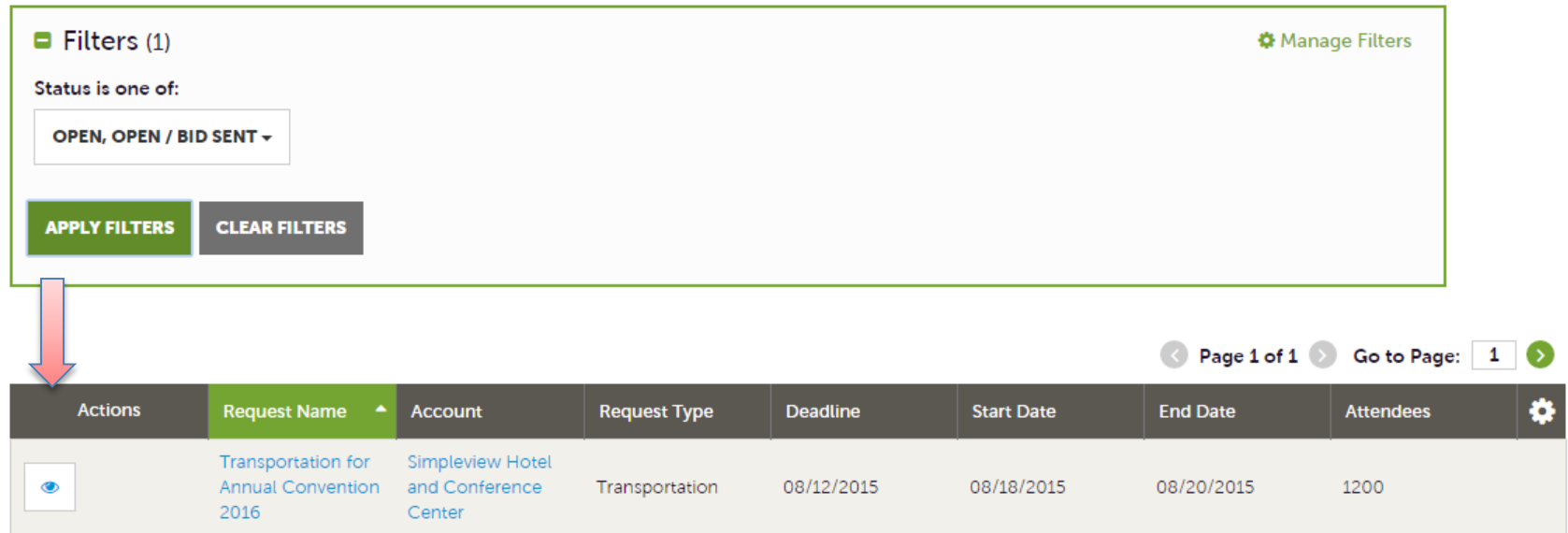
Comments: Required

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 – Service Requests

Service Requests




Filters (1) [Manage Filters](#)

Status is one of:

OPEN, OPEN / BID SENT ▾

APPLY FILTERS **CLEAR FILTERS**

Page 1 of 1 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 **Opportunities** 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)

RETURN

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

RETURN

Attendees1200

Deadline08/12/2015

Budget\$13,000

LocationTo/From Hotel & Convention Center


DescriptionNeed transportation shuttles for convention running all day from 7am to 7pm.

Additional Documents

- 2016-Annual-Convention-RFP.docx

Section Collapsed, click header to expand.

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.



Opportunities – Service Requests (cont'd)

The screenshot displays a web interface for managing service requests. On the left, a sidebar contains the 'Accounts/Responses' section, which is highlighted with a red arrow. Below this is a table with the following data:

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Response


A red arrow points to the pencil icon in the 'Actions' column. Below the table is a 'General' section. On the right, a modal window titled 'Response for Simpleview Hotel and Conference Center' is open. It features a 'Pursuing:' section with a red arrow pointing to the 'Required' label. Below this are two radio buttons: 'YES' and 'NO'. Further down is a 'Comments:' section with a 'Required' label and a text input area.

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 Visit Frederick 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.

 **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

RFPs

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 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

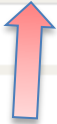
When viewing the Lead, you can skip to different sections by clicking the left navigation. In the above graphic, this is the **Lead Information** section; **Pickup** information is contained within the **Room Data** section.



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 25

Additional room
requests/needs

Pickup Rooms

Pickup Rooms:

0

Pickup Avg. Daily Room Rate:

\$ \$0.00

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
0	0	0	0			

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.

