Extranet User Instructions

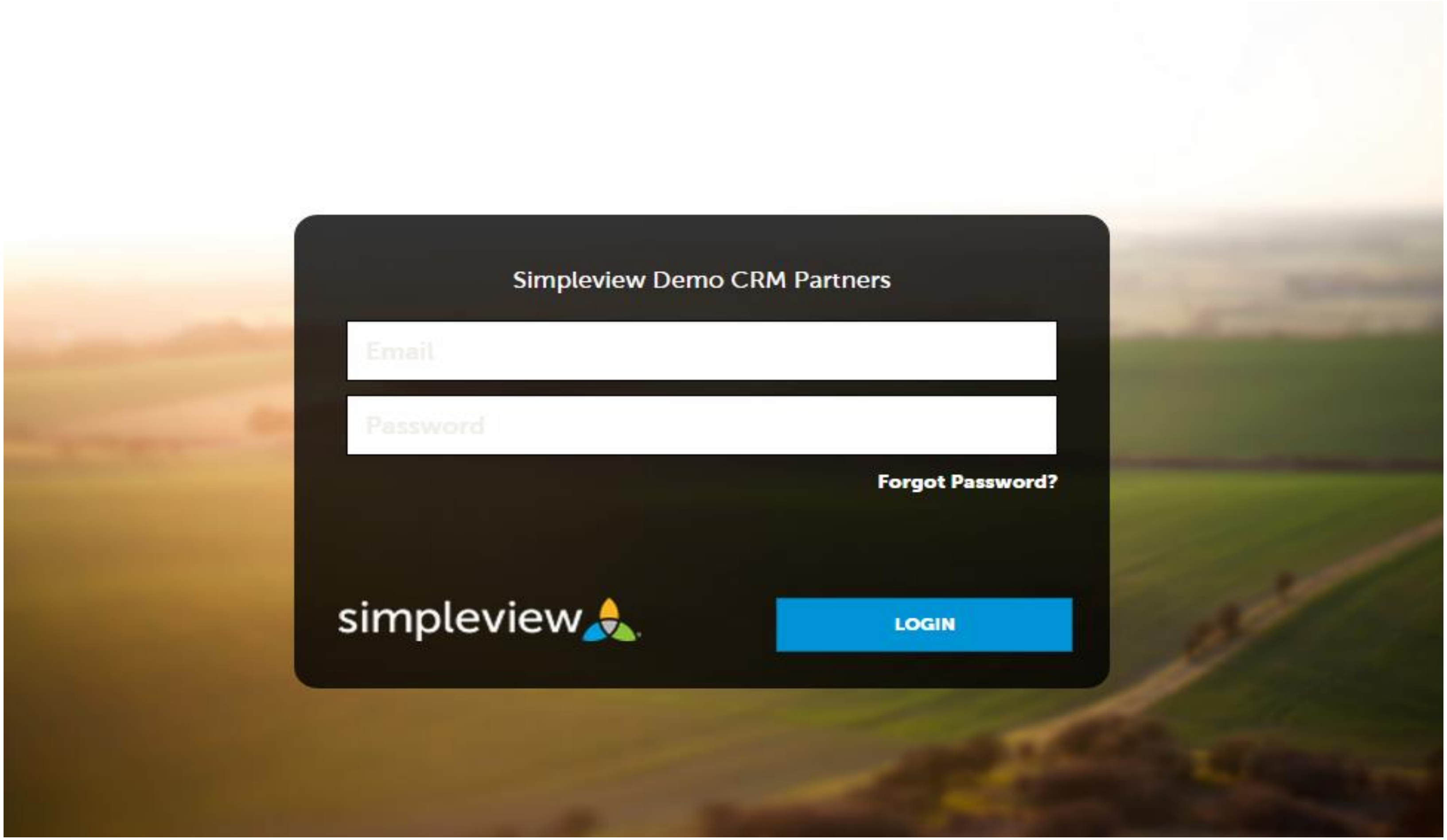
This document is a resource for you that provides step-by-step instructions on accessing your account and updating your information. If you have questions, please contact Becky Bickerton at 301-600-4050.

VISIT Frederick Maryland

City & County

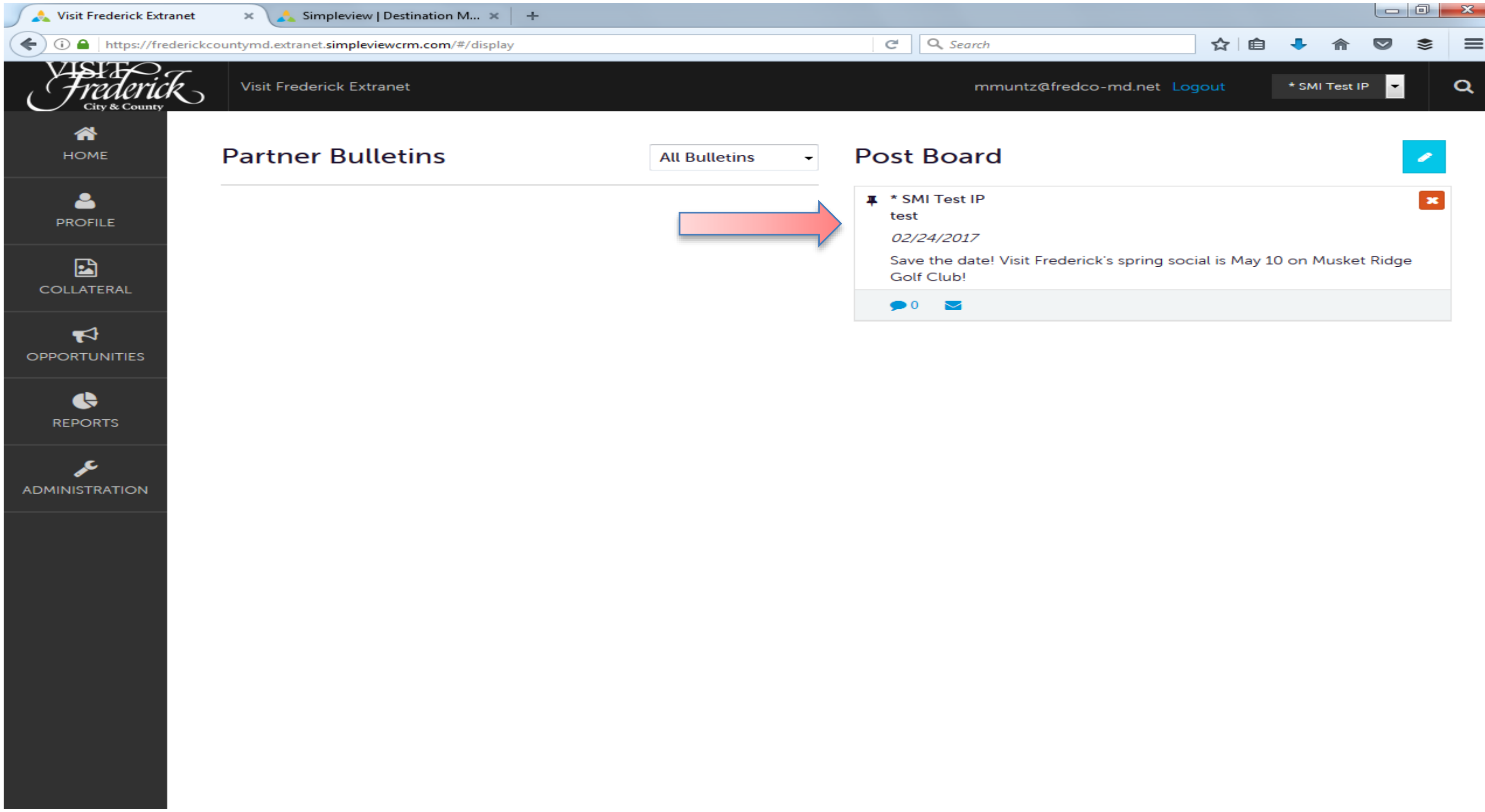
WWW.VISITFREDERICK.ORG

Login Screen



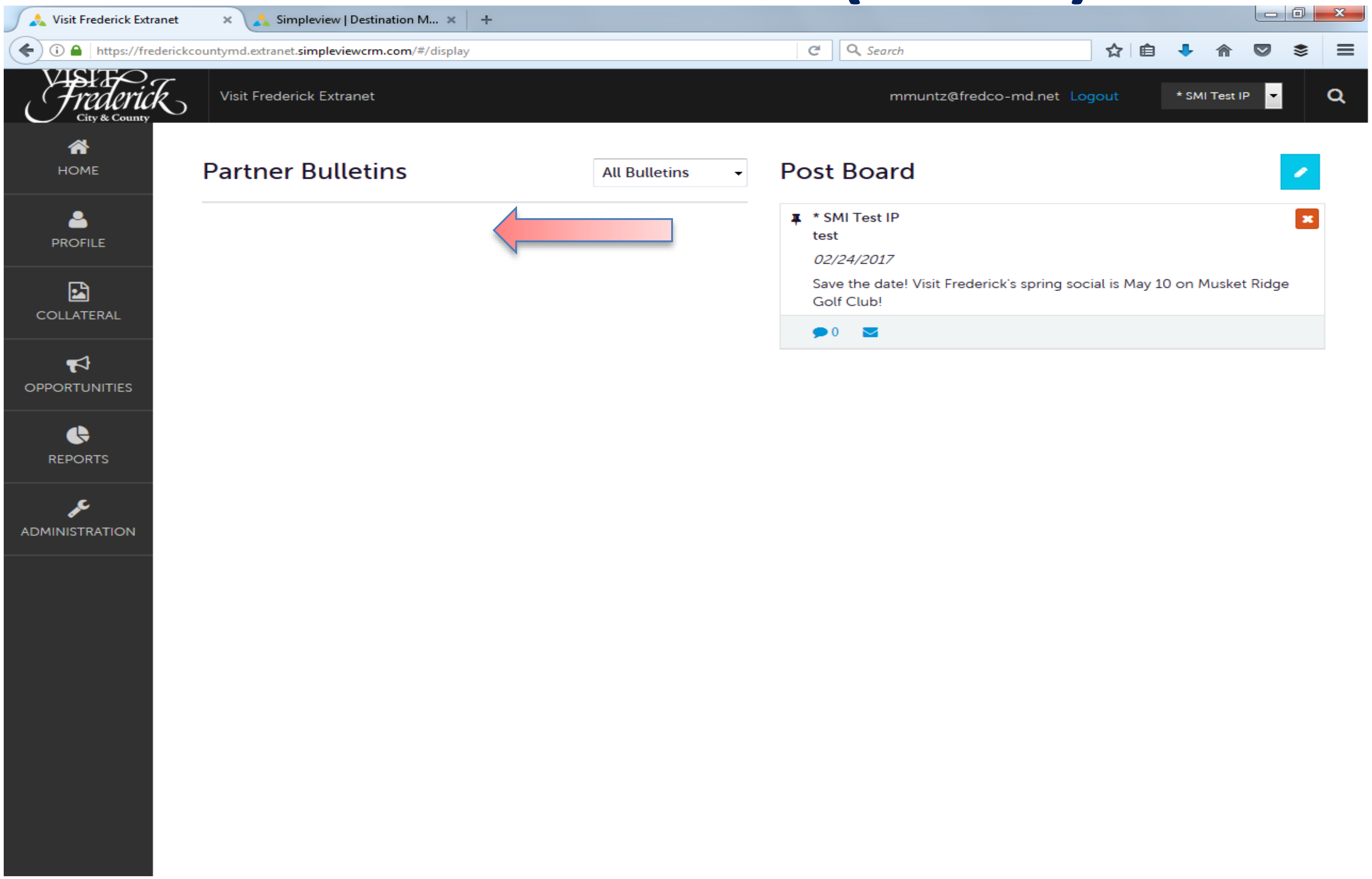
If you have difficulty logging in, contact Becky Bickerton at 301-600-4050.

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.

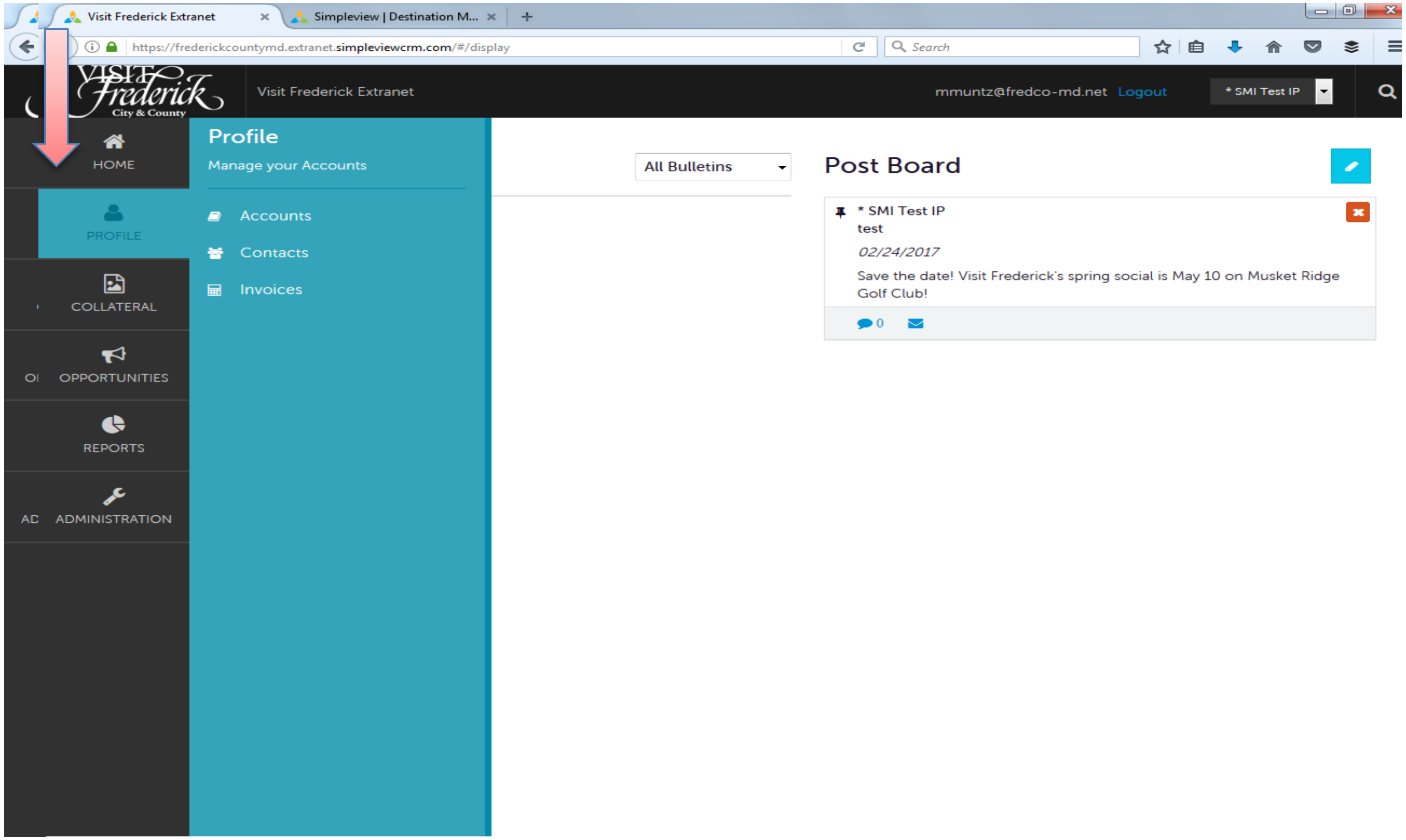
Home Screen (cont'd)



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.

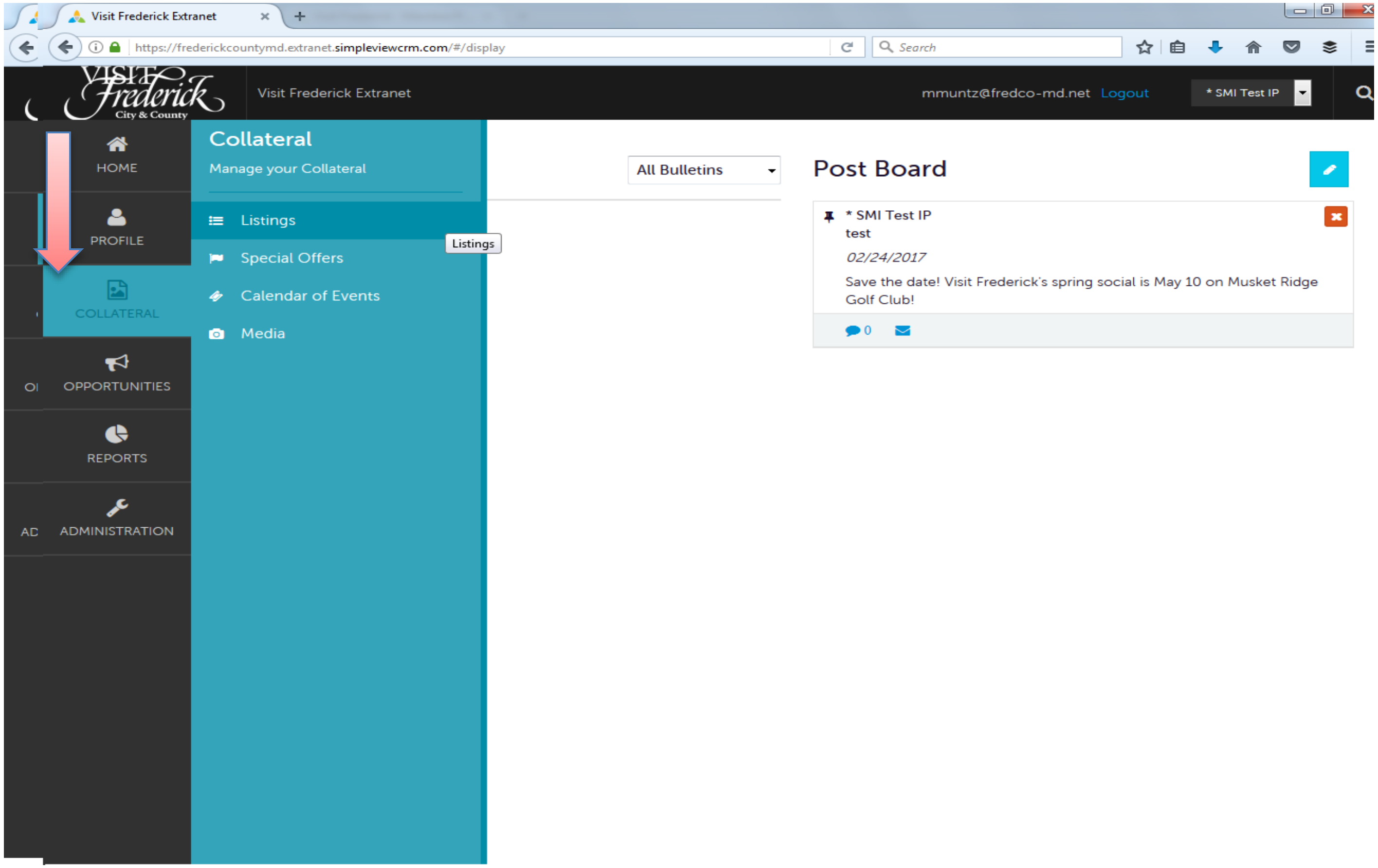
NOTE: Tour/Travel and Meeting Sales Leads will be posted under Partner Bulletins.

Home Screen (cont'd)



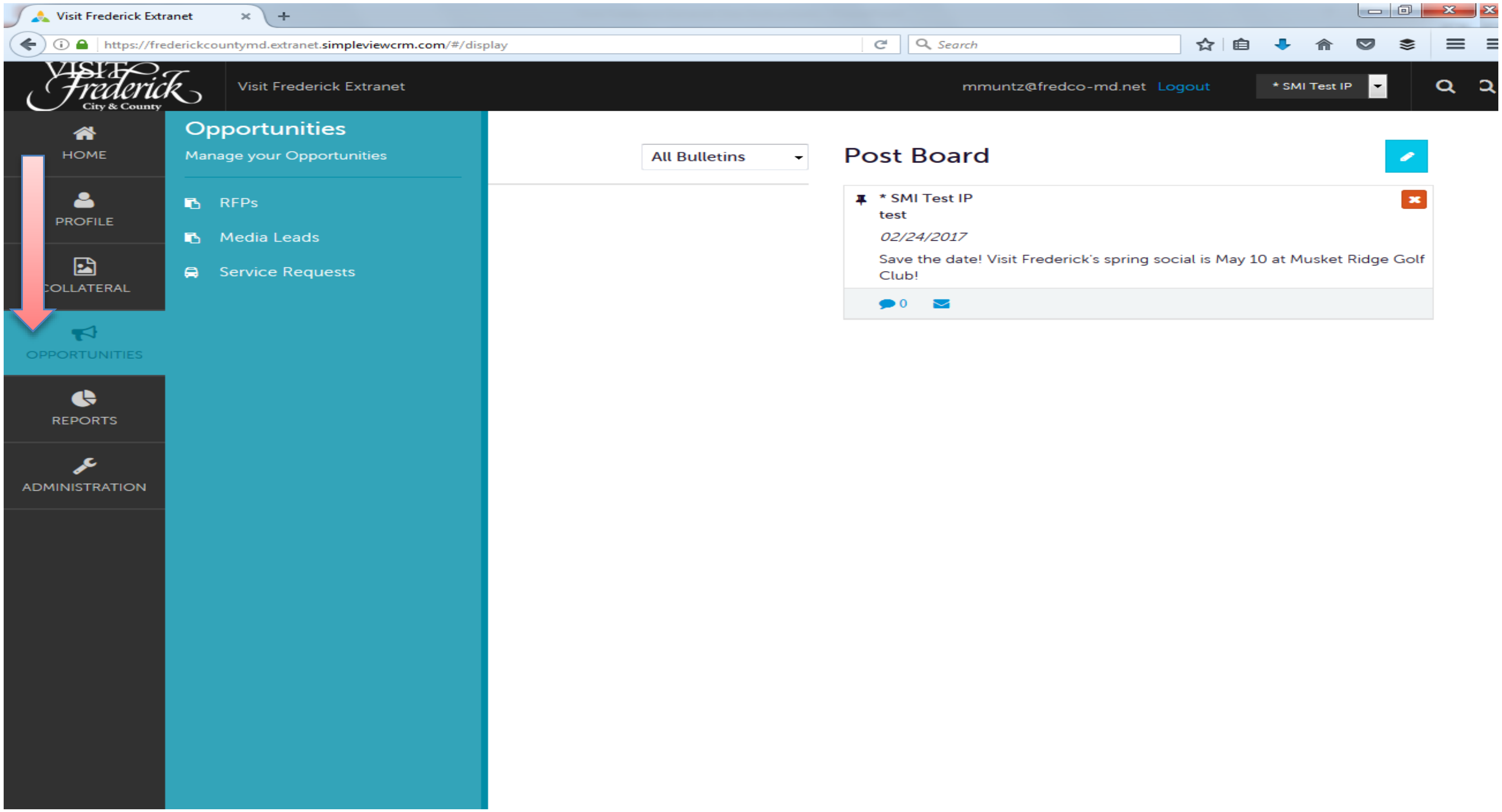
Clicking the **Profile** icon displays an organization's information, such as contacts, account details and invoices sent by Visit Frederick.

Home Screen (cont'd)



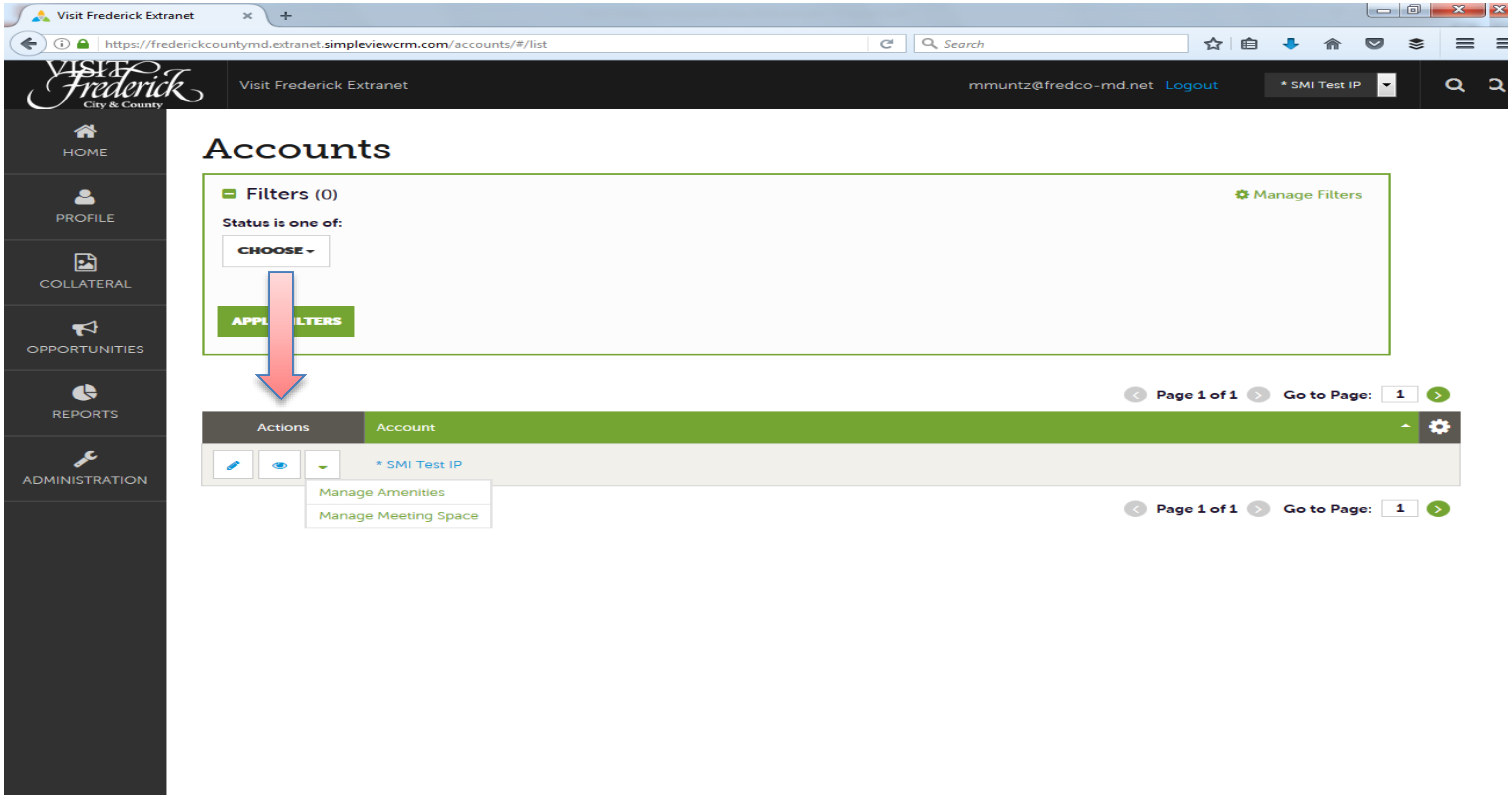
Clicking the **Collateral** icon, displays options for Listings (website and visitor guide), Special Offers, Calendar of Events, and Media (i.e. images and video).

Home Screen (cont'd)



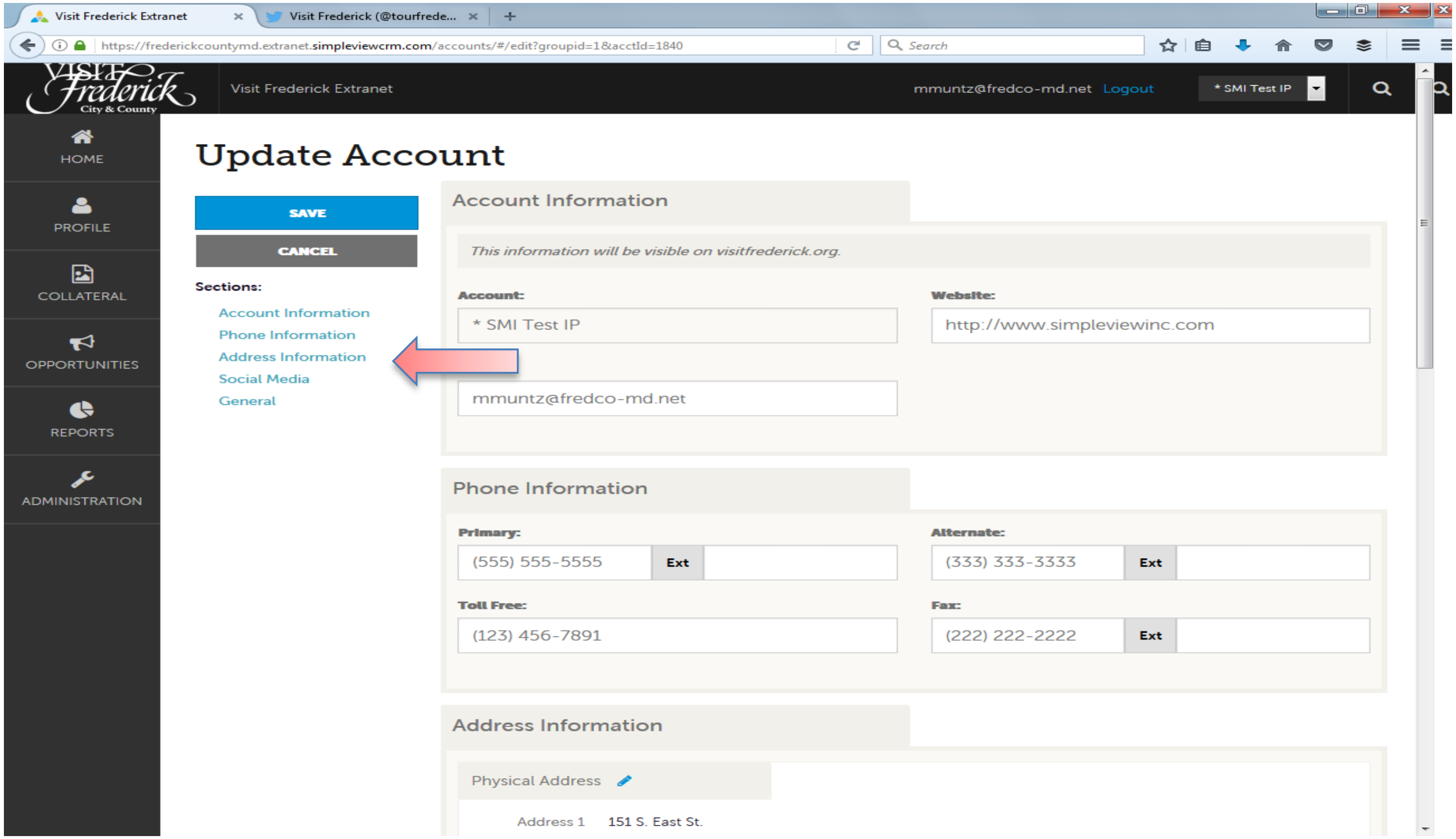
Clicking the **Opportunities** icon, displays options for RFPs sent by Visit Frederick. Opportunities will be most relevant to lodging properties. Opportunities are broken into RFPs (Meeting and Tour Leads), Media Leads (travel writer RFPs), and Service Requests (other RFPs).

Manage Profile - Accounts



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.

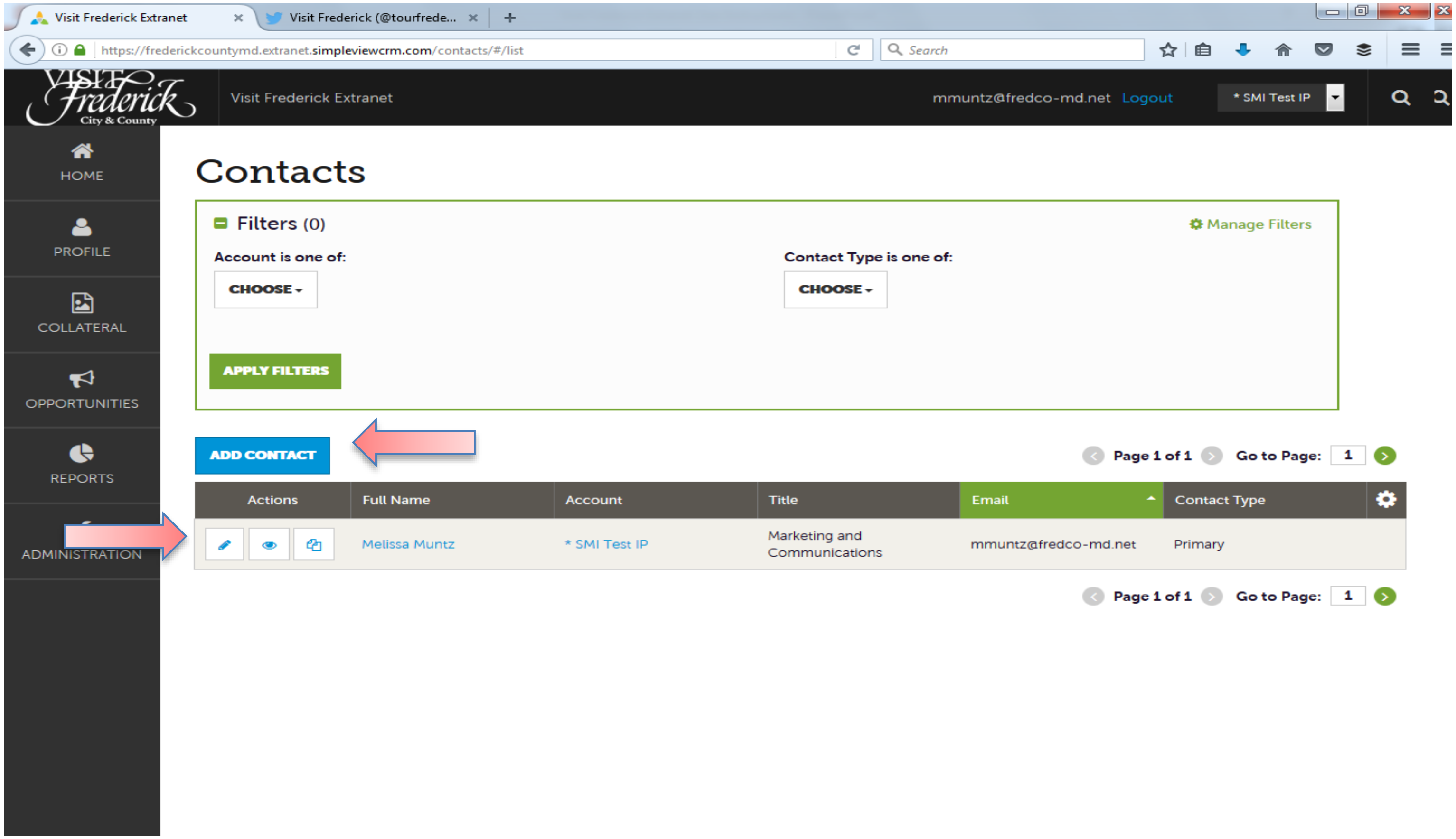
Manage Profile - Accounts (cont'd)



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).

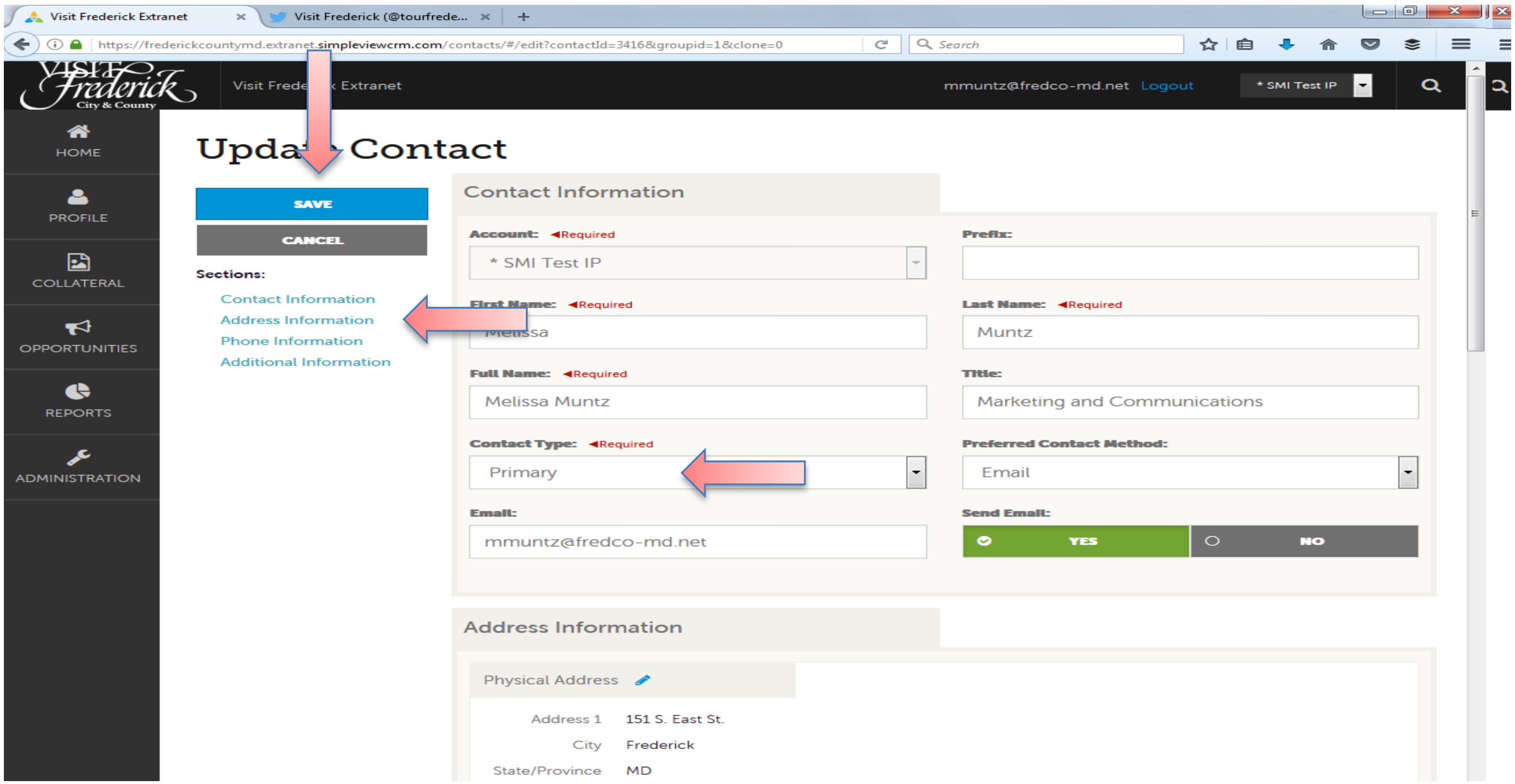
<u>You must click the **SAVE** button before changes are applied!</u>

Manage Profile - Contacts



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.

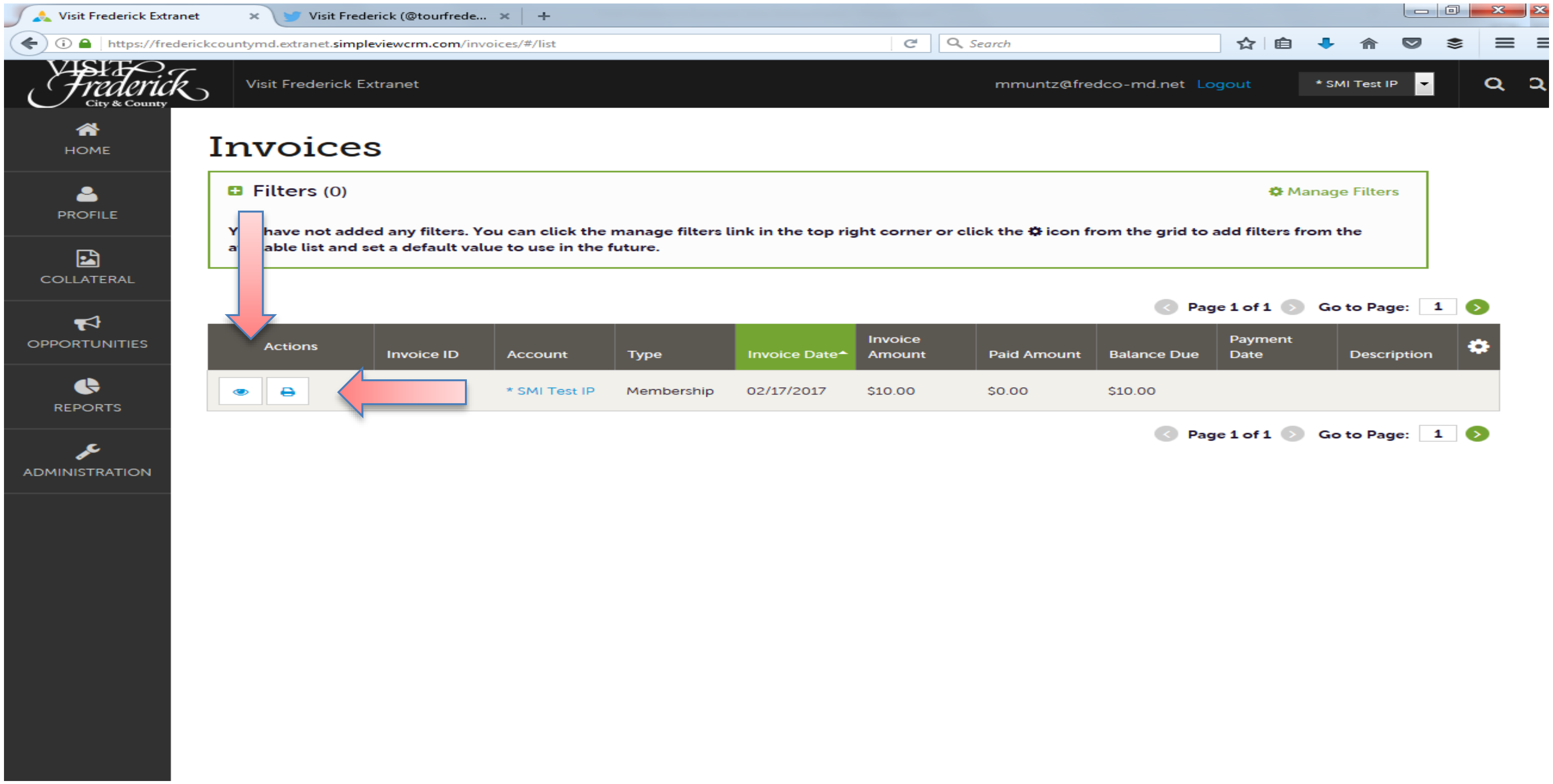
Manage Profile - Contacts (cont'd)



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. <u>You must click the **SAVE** button before changes are applied!</u>

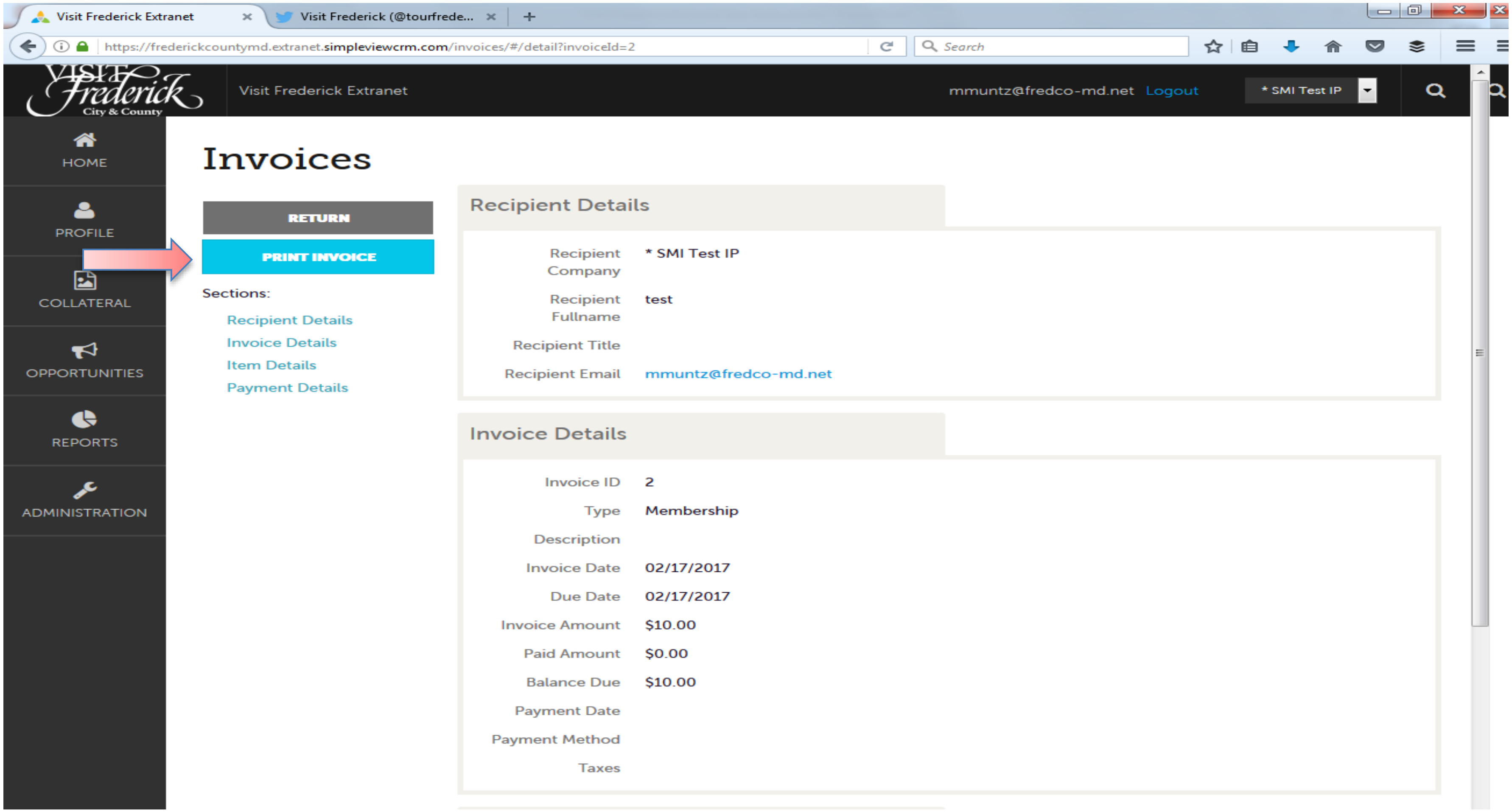
<u>**IMPORTANT NOTE:**</u> If a contact has left your organization, it is your responsibility to change their contact type to **"Inactive"**.

Manage Profile - Invoices



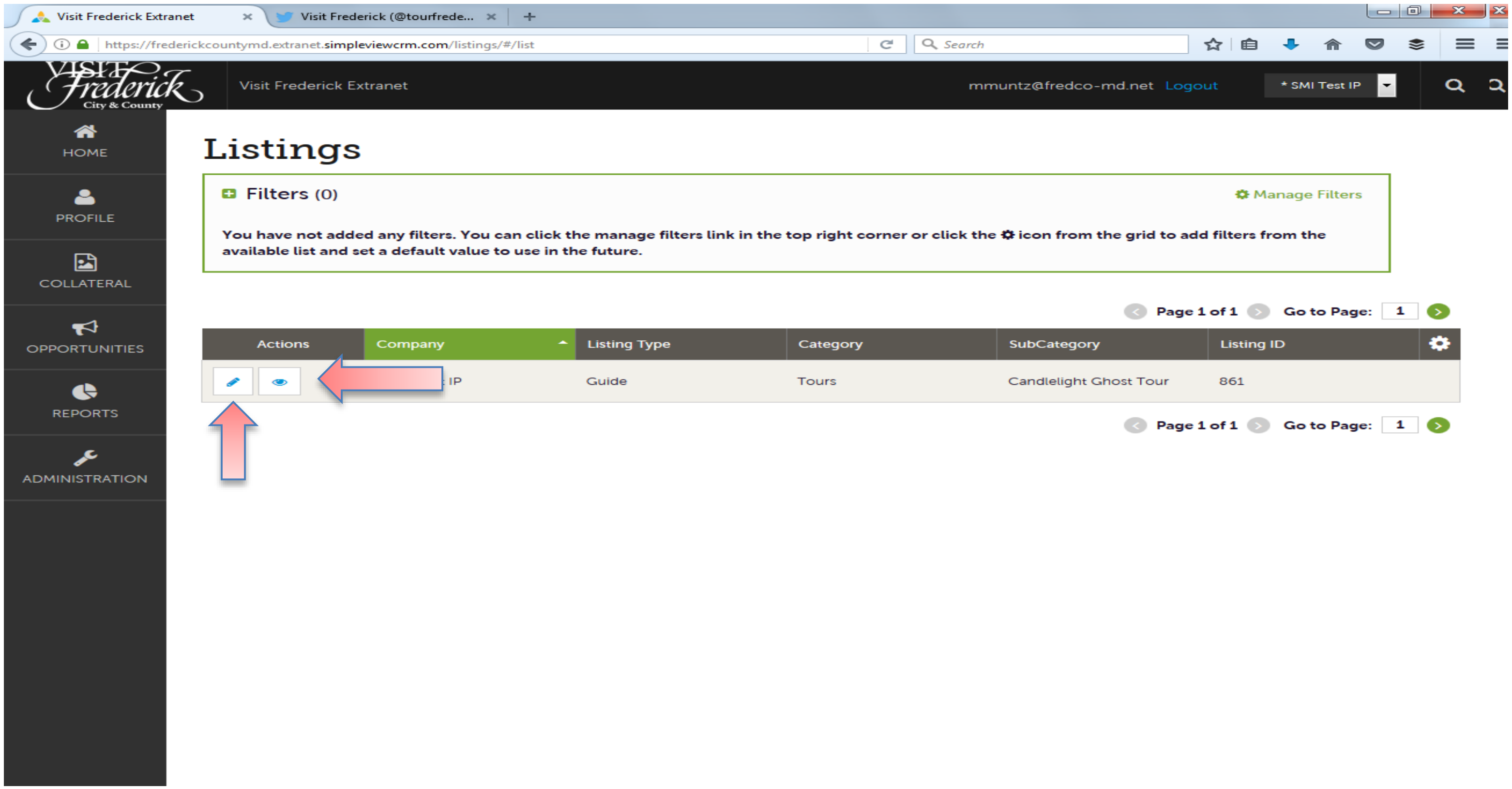
After you click the **Profile** icon and then invoices, you will be presented with a list of invoices sent to your organization. To view the details of the invoice, you can either click the **Eyeball** icon or the **Print** icon.

Manage Profile - Invoices (cont'd)



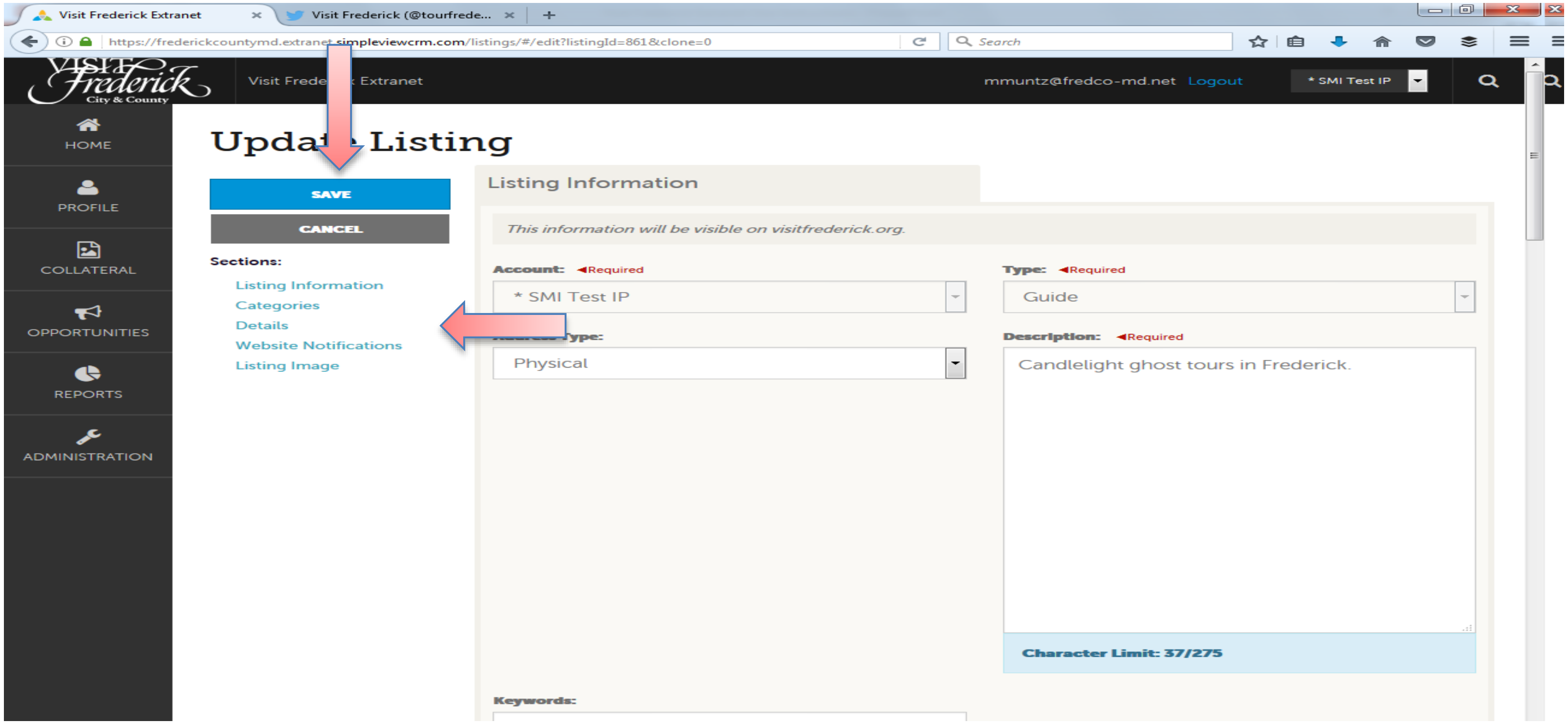
You can view and print an invoice from this page. Online payments are currently not accepted. To pay your invoice, please mail a check to Visit Frederick, 151 S. East St. Frederick MD 21701 or, to pay via credit card, call Becky Bickerton at 301-600-4050.

Collateral - Listings



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.

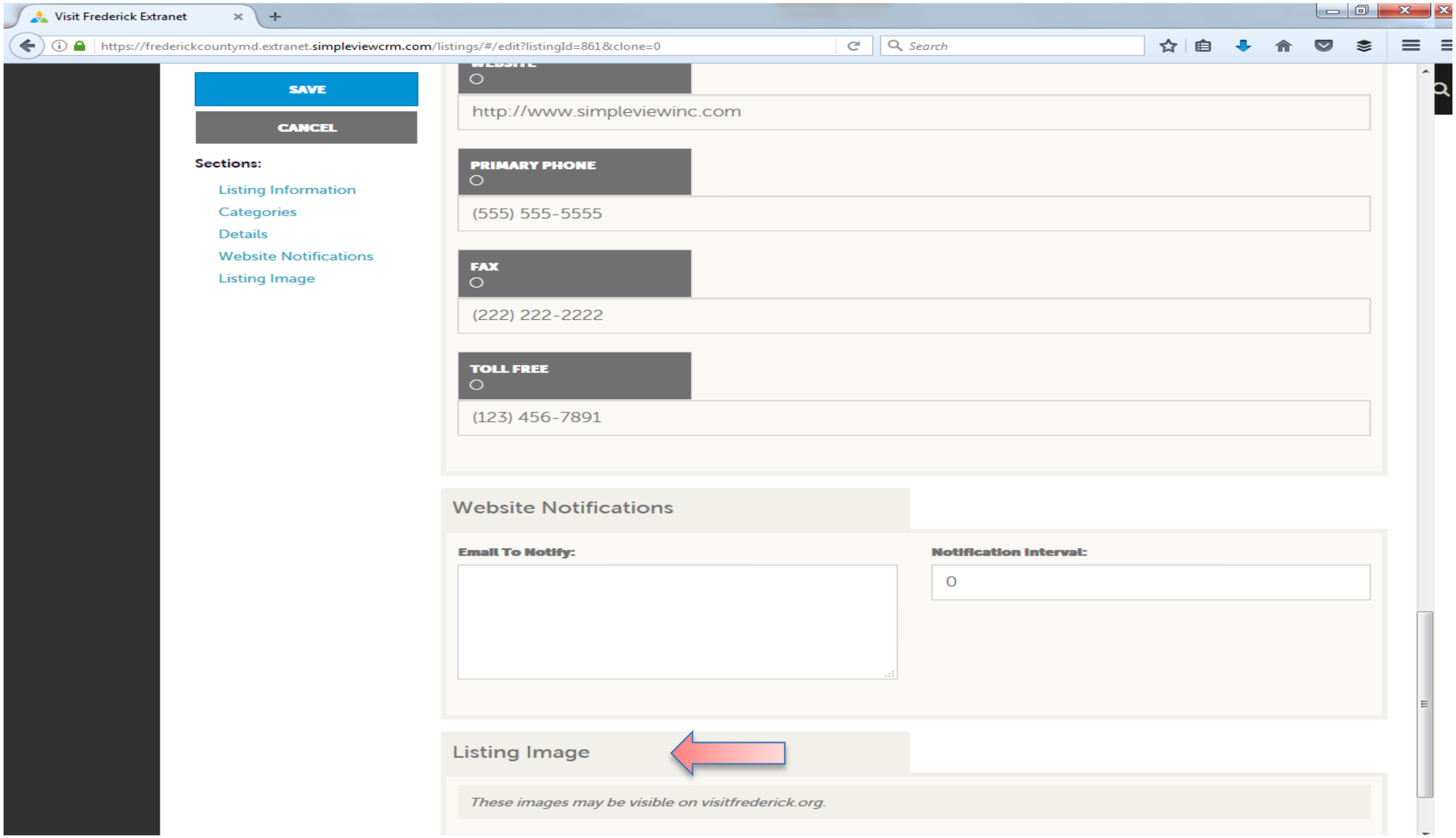
Collateral – Listings (cont'd)



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. <u>You must click the **SAVE** button before changes are applied!</u>

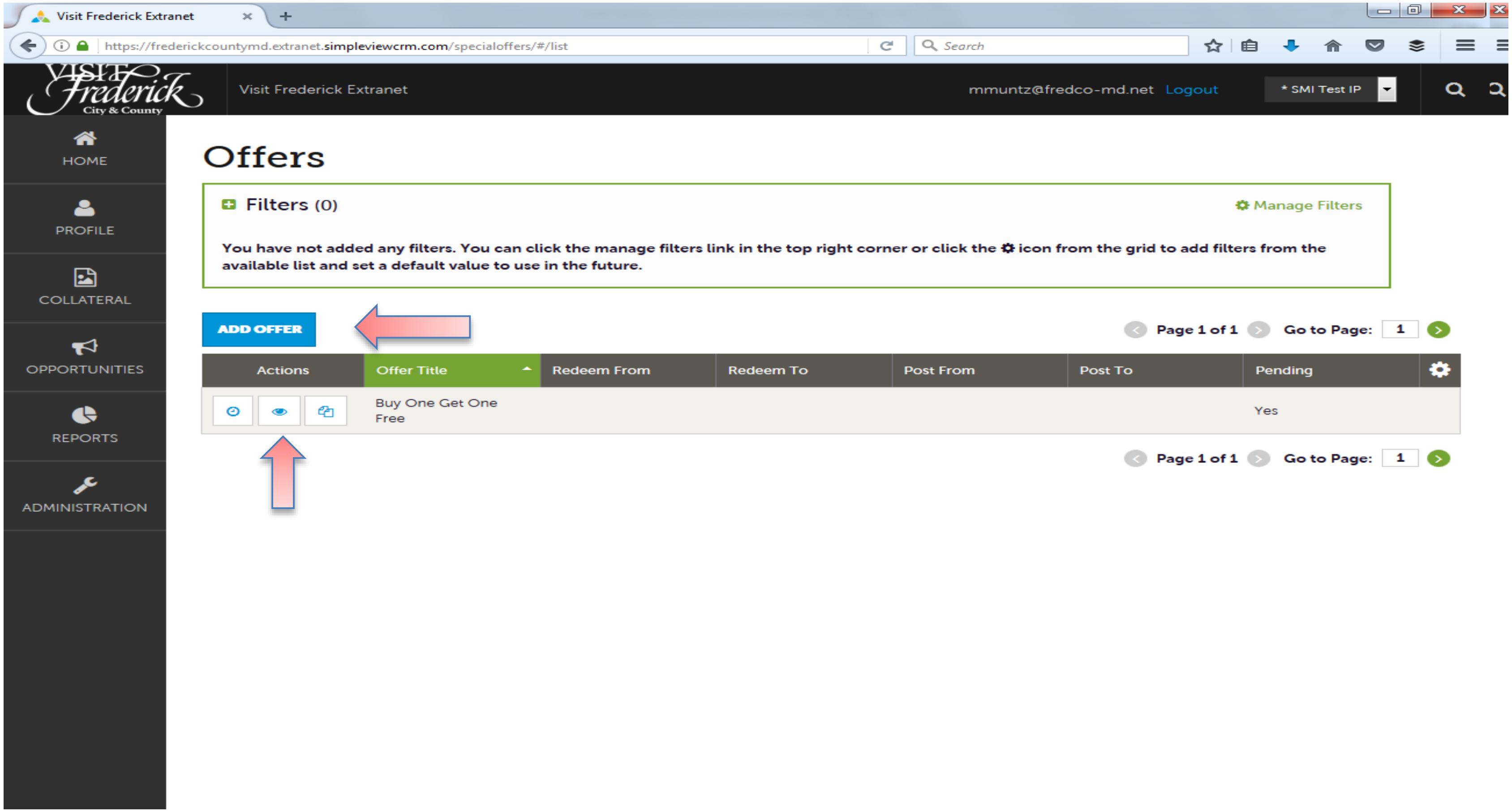
<u>**IMPORTANT NOTE:**</u> Any edits to listings will require approval from Visit Frederick. Upon saving your updates, Visit Frederick will be notified of your changes/additions.

Collateral – Listings (cont'd)



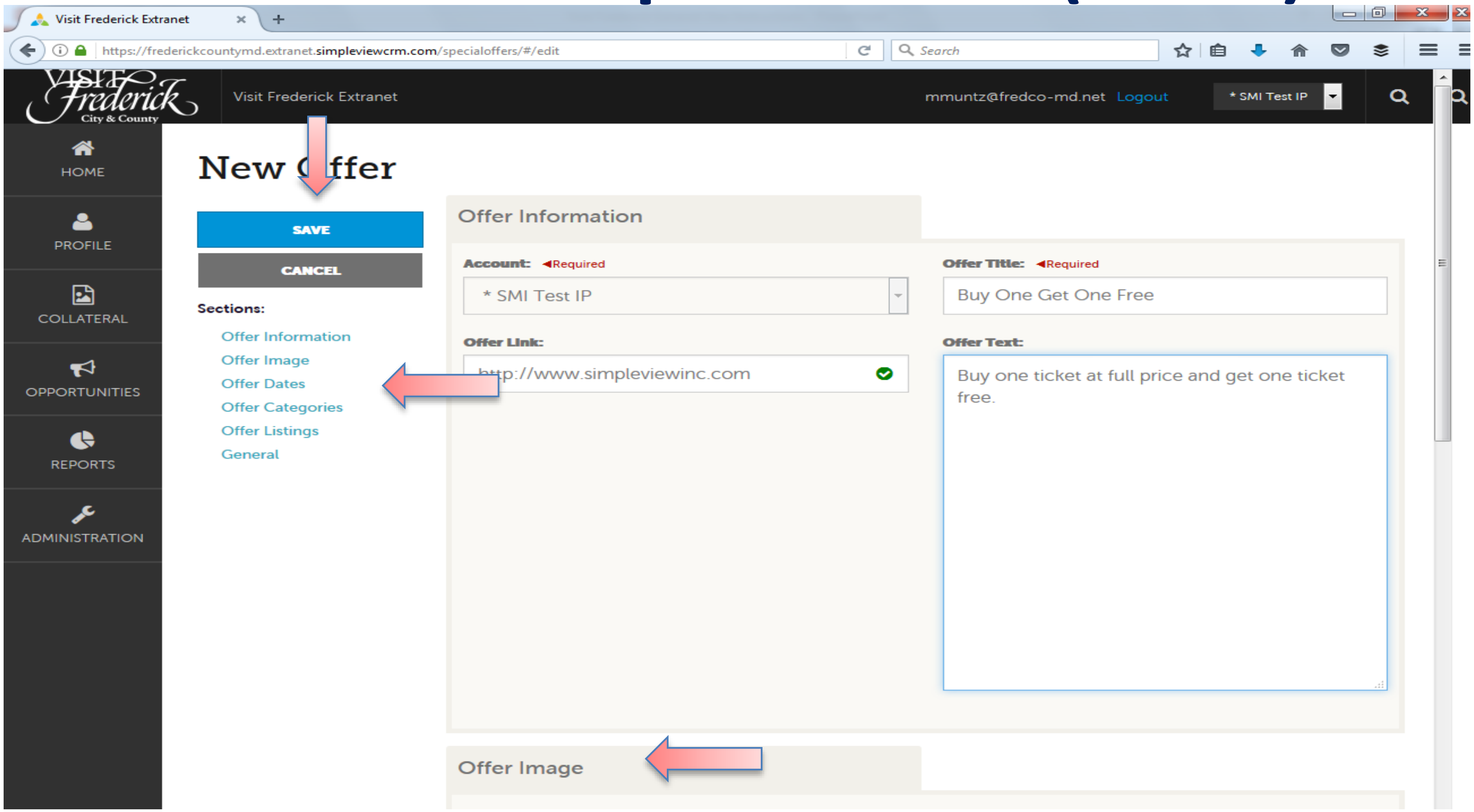
When you edit a listing, you can select one or multiple images to associate to the listing by selecting the **Listing Images** pull down menu. Upon saving your updates, Visit Frederick will be notified of and approve or deny your changes/additions.

Collateral – Special Offers



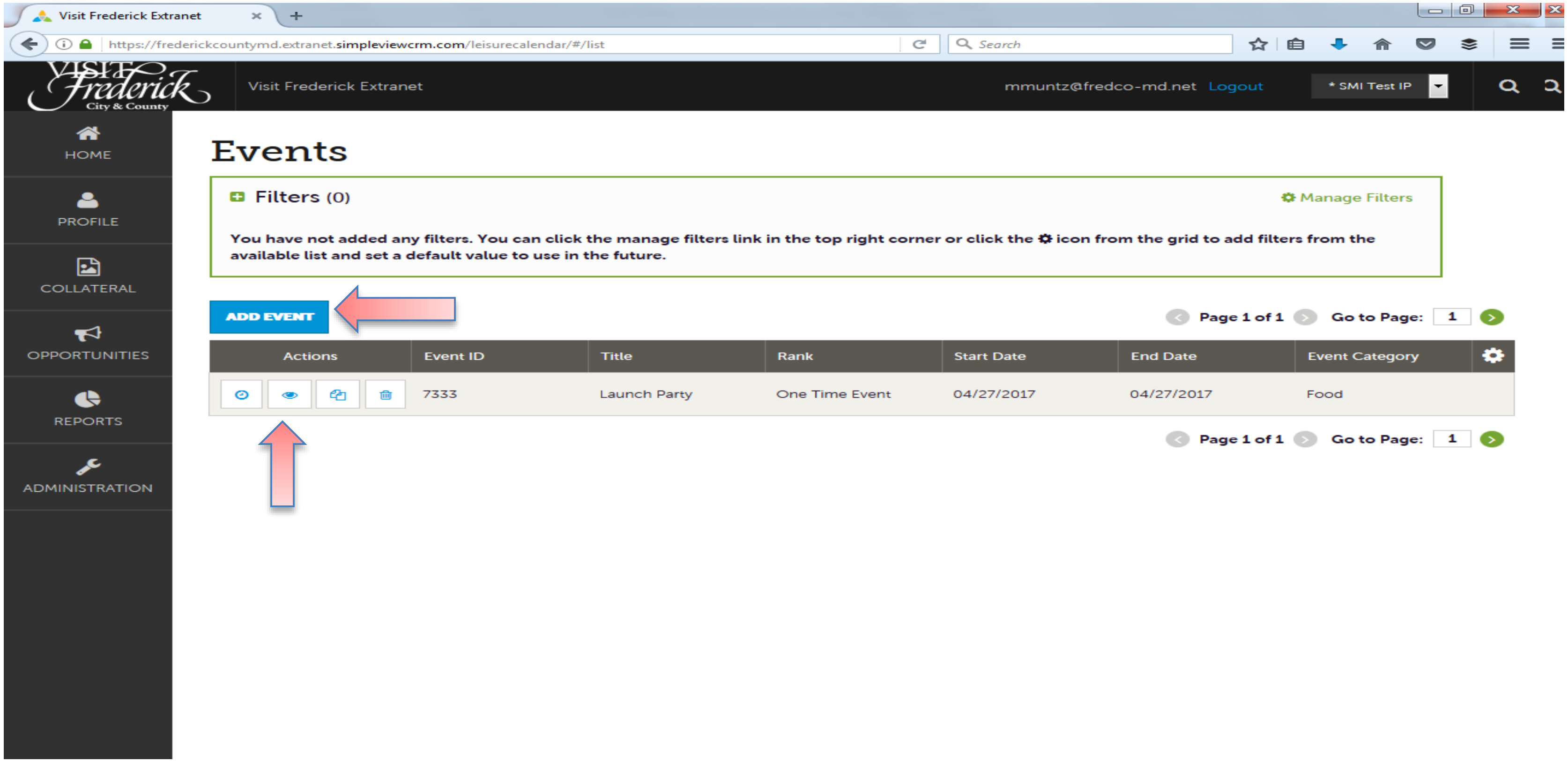
After you click the **Collateral** icon and then **Special Offers**, you will be presented with your organization's offers. The **Pencil** icon will allow you to edit an existing offer. By clicking the **Eyeball** icon, you can view the existing offer. The **Clone** icon will allow you to duplicate an offer. You can also create a new offer by clicking the **ADD OFFER** button.

Collateral – Special Offers (cont'd)



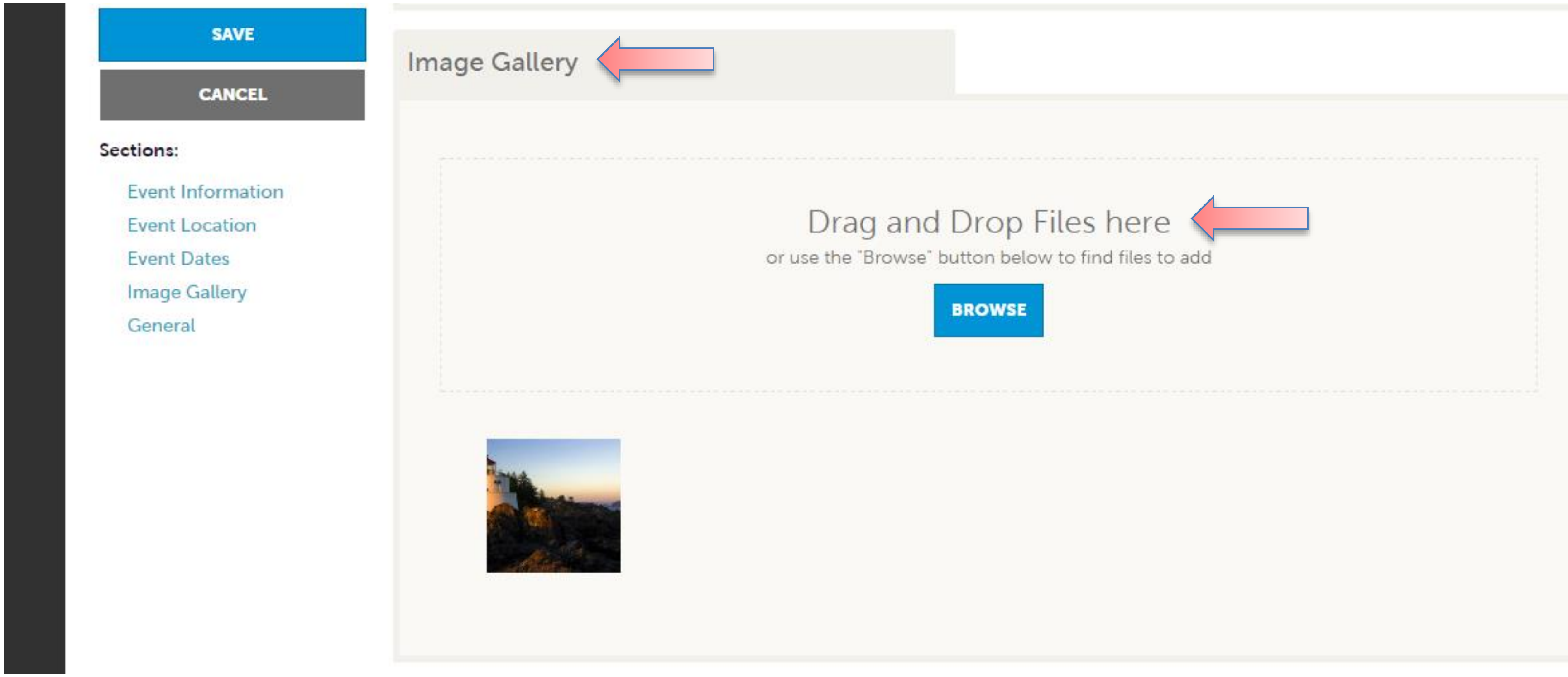
When you view, edit, or add an offer, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing an offer, the button in the top left will say **EDIT**. If you are editing an offer, the top left will display a blue **SAVE** button. <u>You must click the blue **SAVE** button before changes are applied!</u> 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



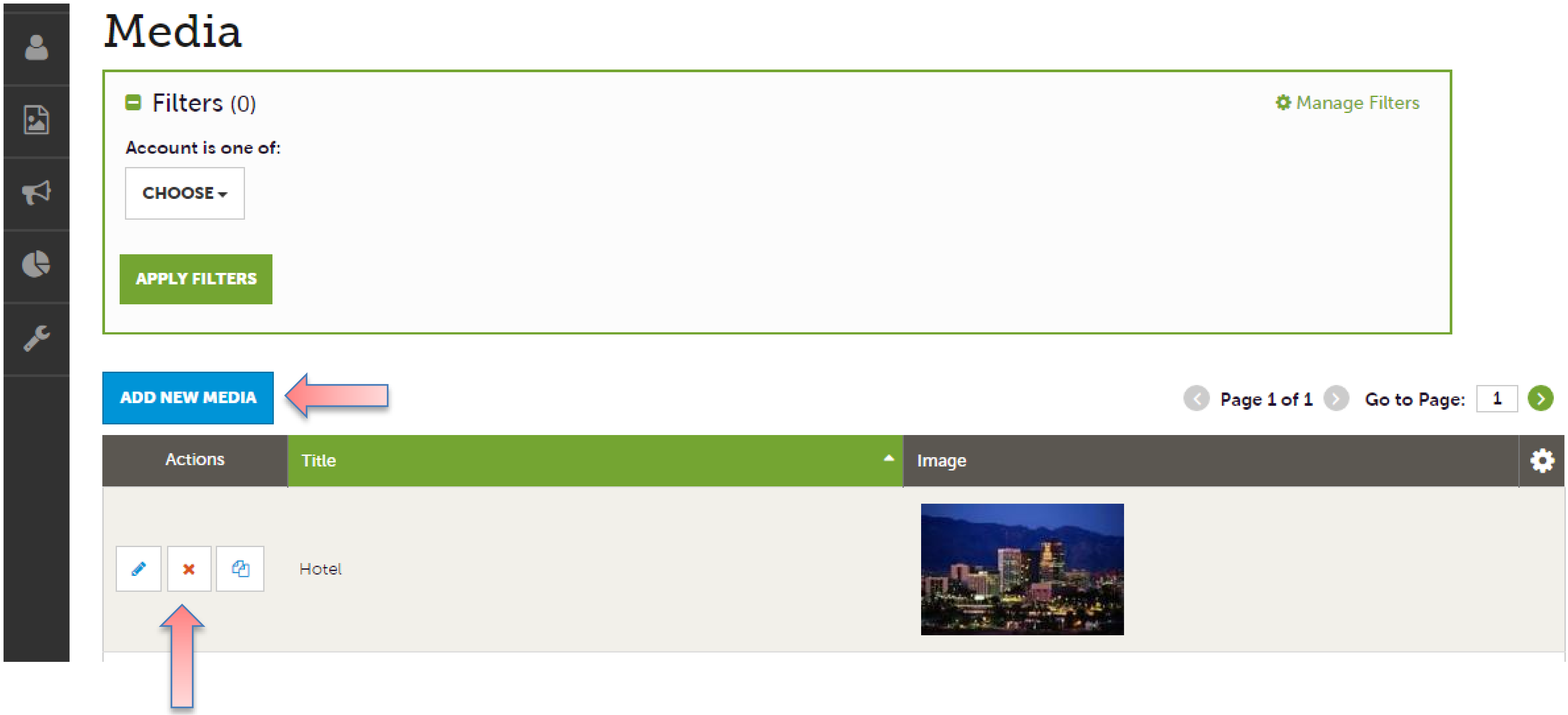
After you click the **Collateral** icon and then **Calendar of Events**, you will be presented with your organization's events. The **Pencil** icon will allow you to edit an existing event. By clicking the **Eyeball** icon, you can view the existing event. The **Clone** icon will allow you to duplicate an event. You can also create a new event by clicking the **ADD EVENT** button.

Collateral – Calendar of Events (cont'd)



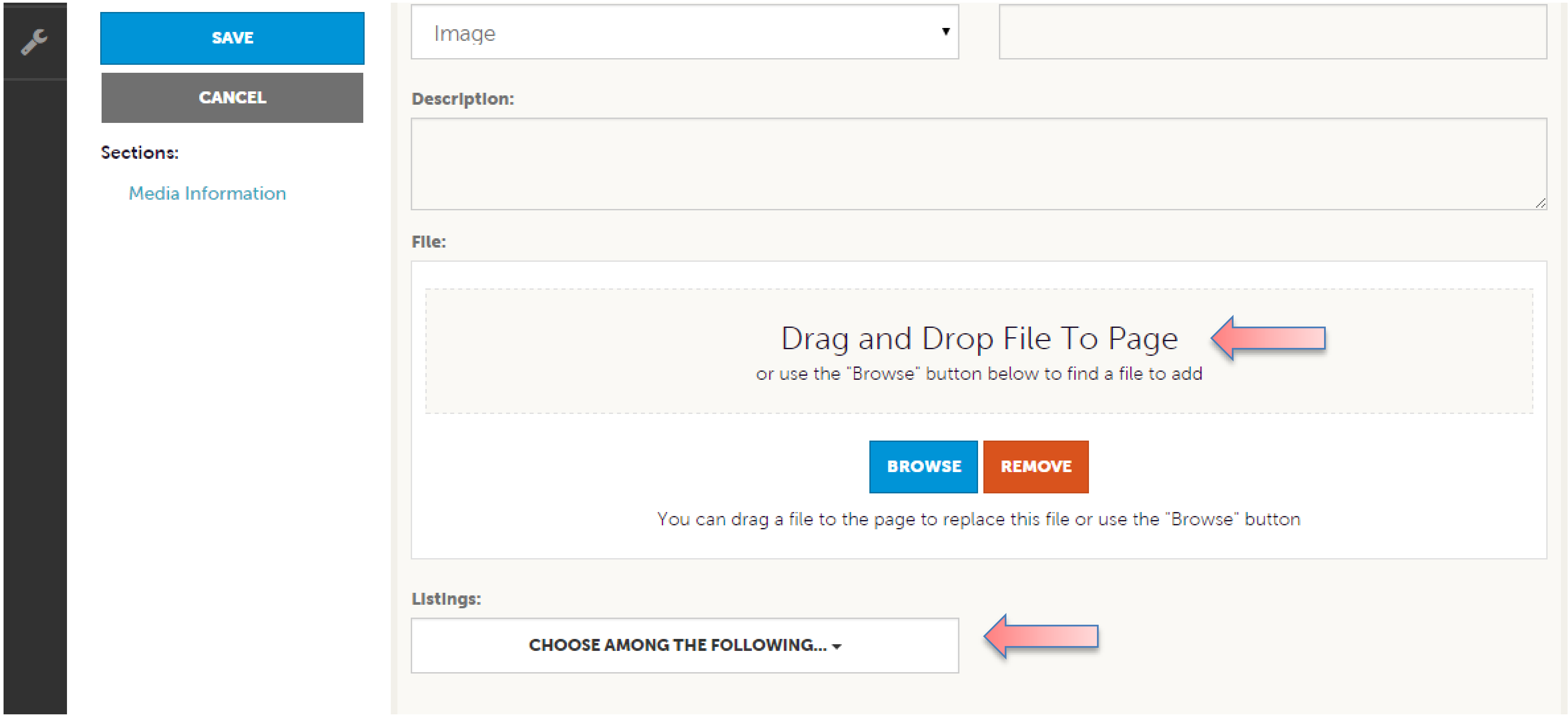
As with Listings and Special Offers, you can add images to your event. Adding images to an event is a little different, though. In the **Image Gallery** section on the event, you can drag and drop an image or click the browse button to search your computer for an image. Upon saving your updates, Visit Frederick will be notified of and approve or deny your changes/additions.

Collateral – Media



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)



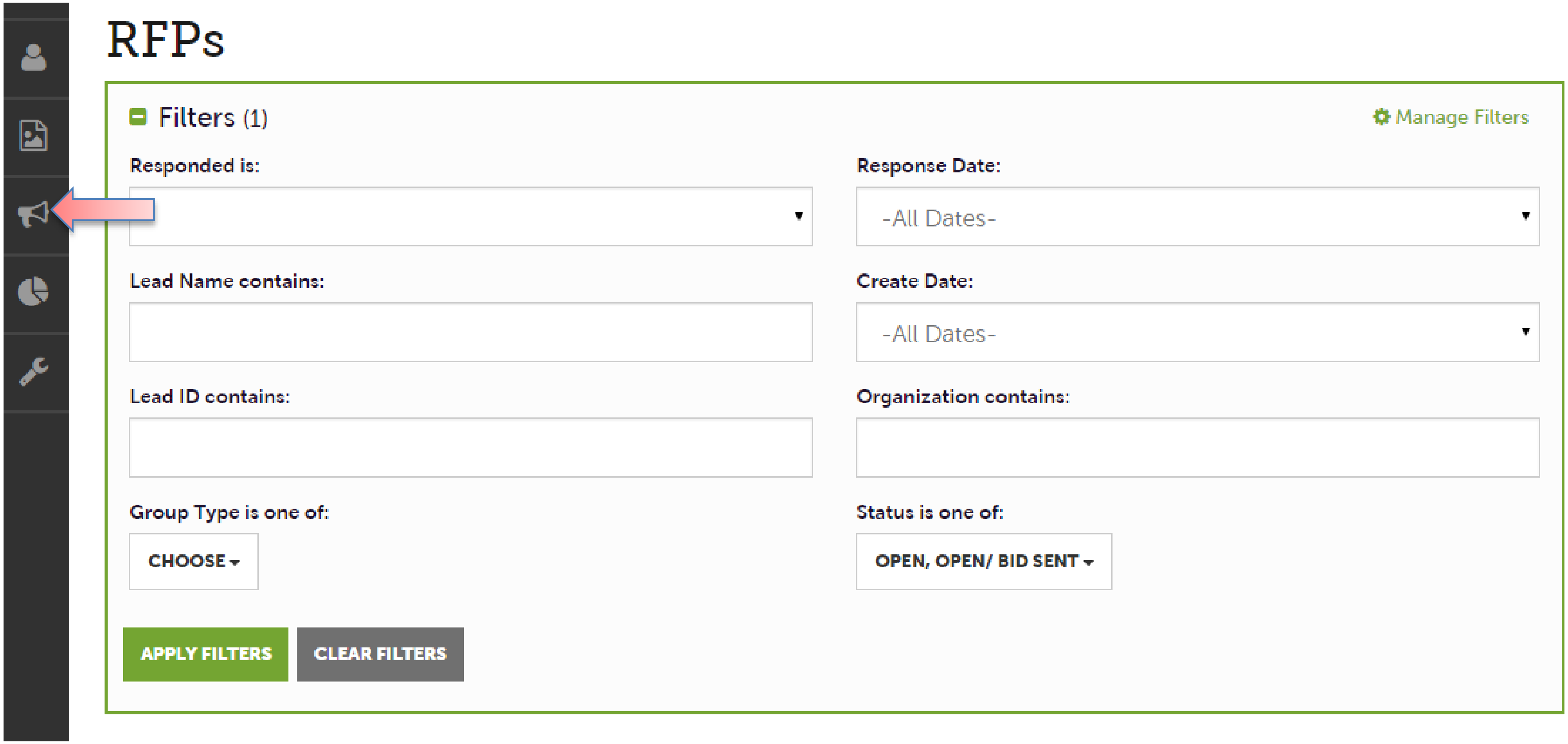
As with Calendar of Events you can browse your hard drive or drag and drop an image. Once you upload a new image or edit an existing one, you can attach the image to one or multiple listings by selecting the **listings pull down menu**. We suggest that you use photos of your location rather than an organizational 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



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)

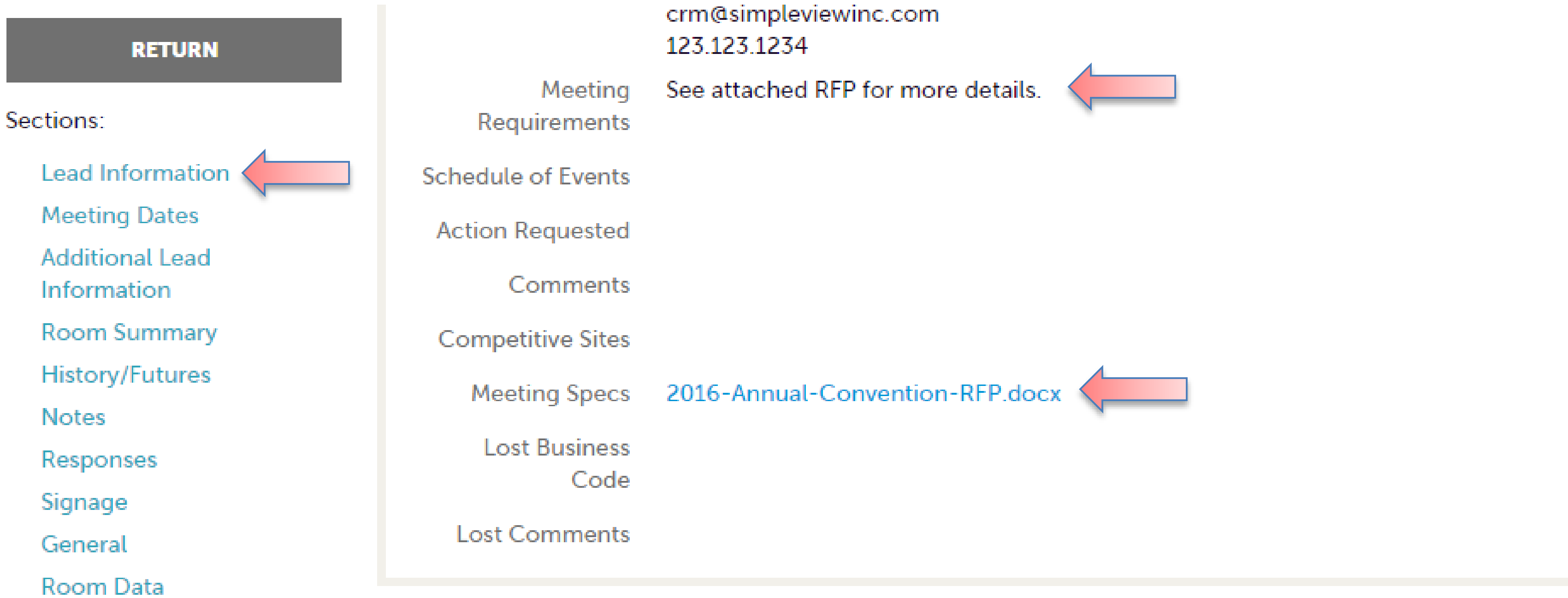
Page 1 of 1 Go to Page: 1

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. 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.

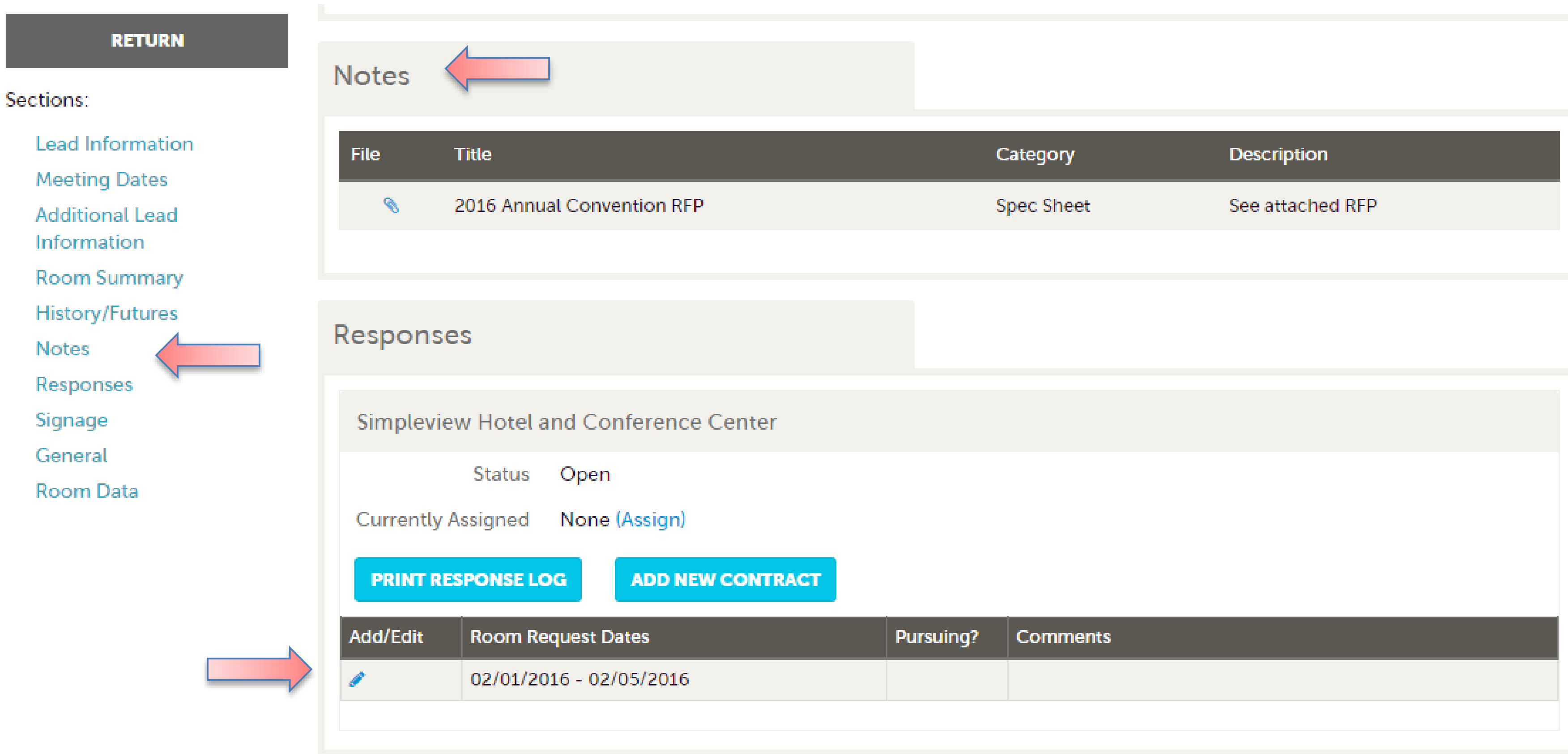
To view a Lead, click on the **Eyeball** icon or the **Lead Name.**

Opportunities – RFPs (cont'd)



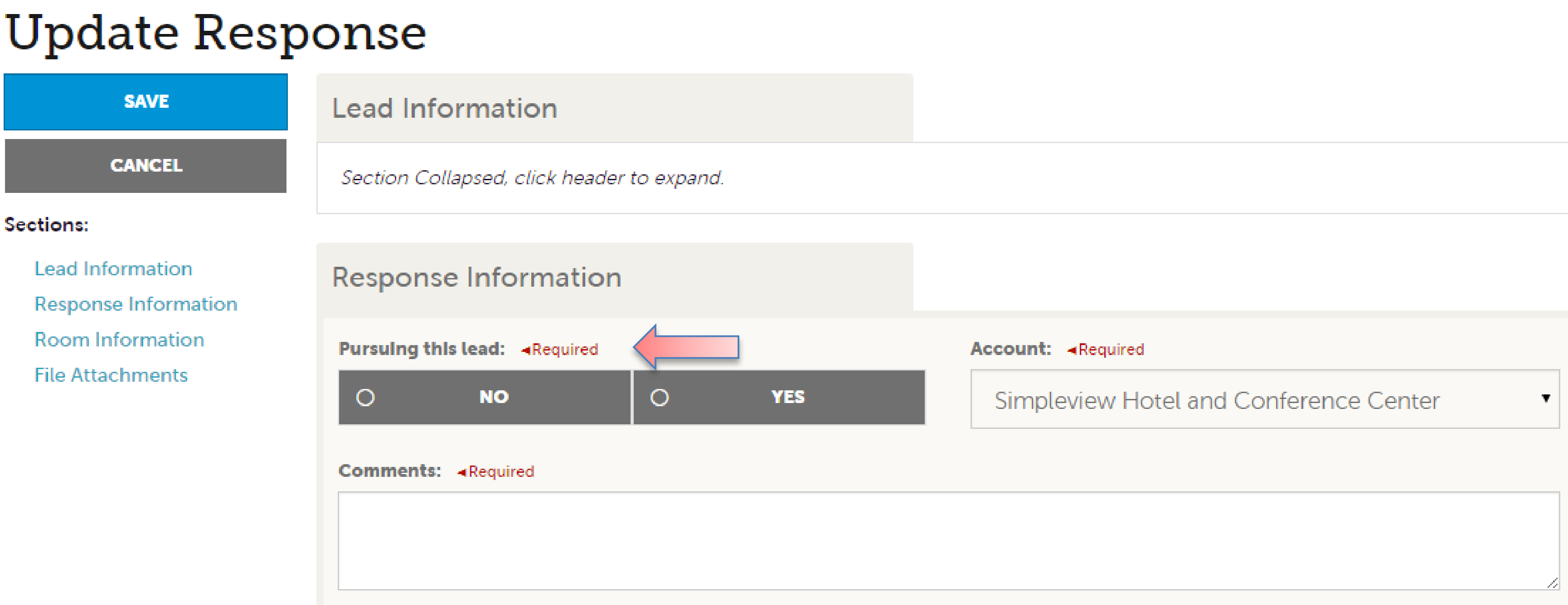
When viewing the Lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the Lead, these can generally be found in one of two areas: **Lead Information and/or Notes section**. In the above graphic, this is the **Lead section**; attachments will be found in the **Meeting Specs** field. For the Notes section, see next slide.

Opportunities – RFPs (cont'd)



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)



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:

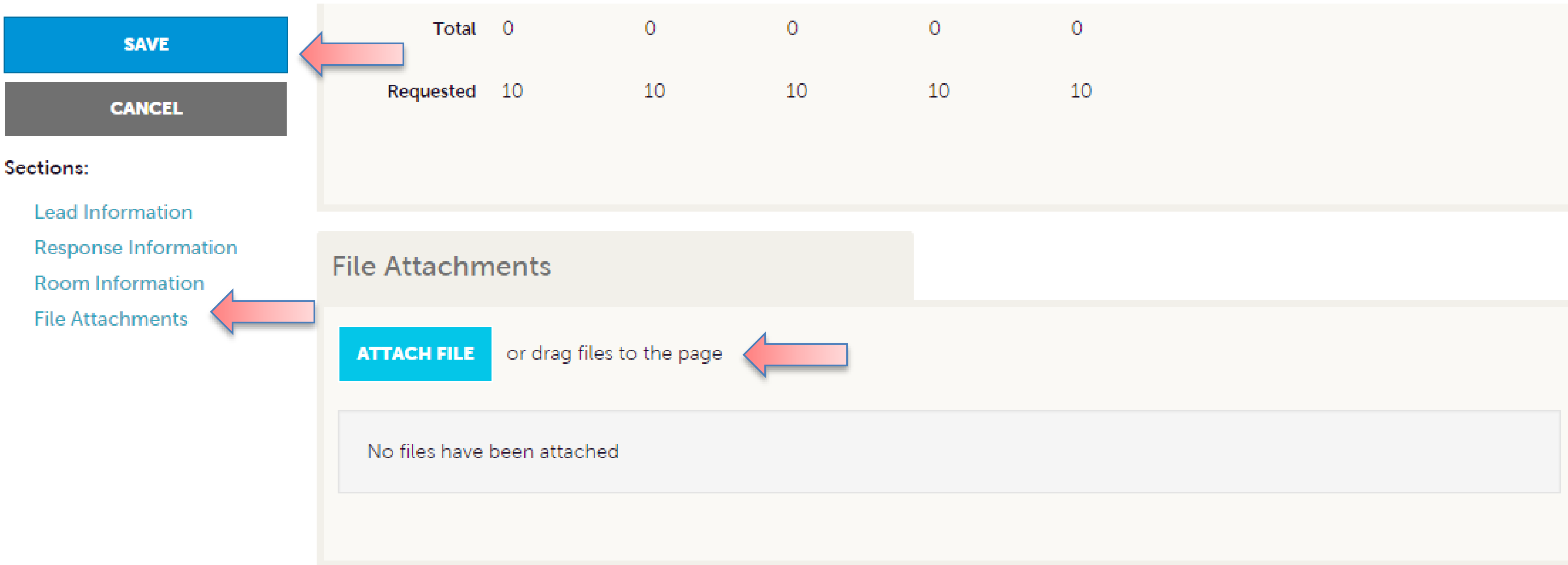
- Lead Information
- Response Information
- Room Information
- File Attachments

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.

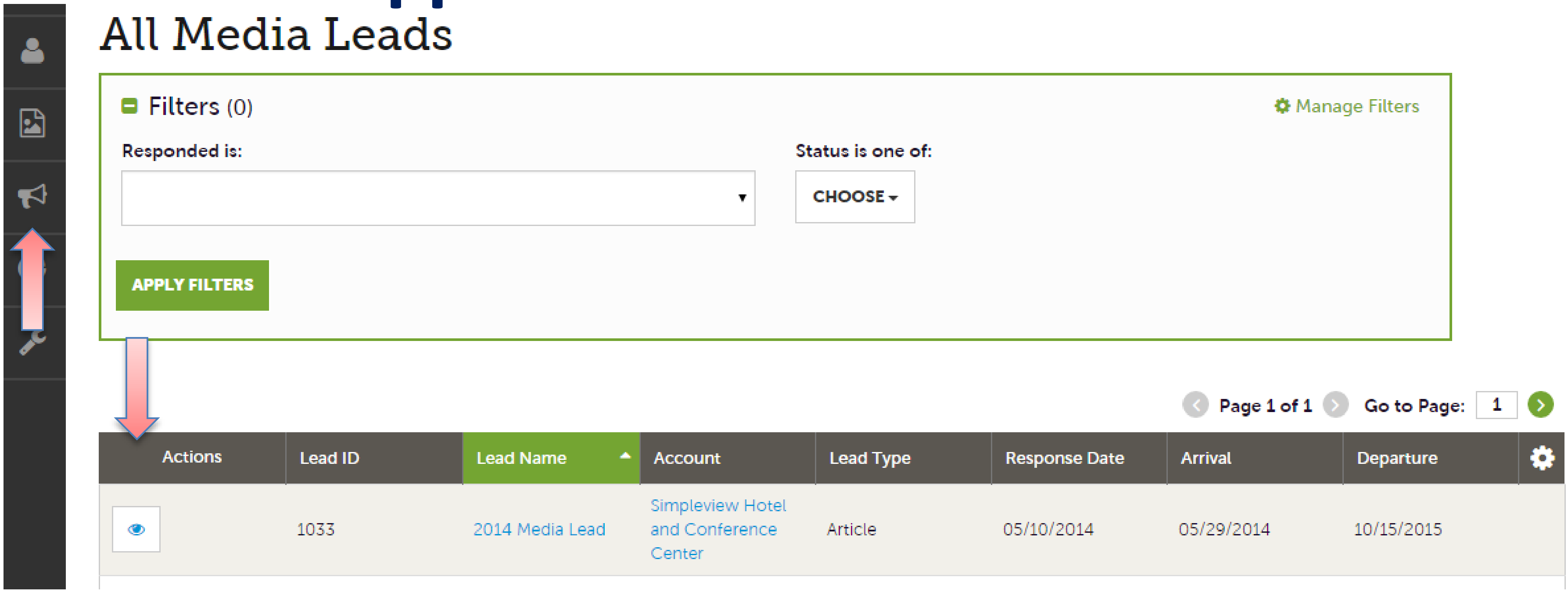
Opportunities – RFPs (cont'd)



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.

<u>Once you have finished entering all your response information don't forget to click the **SAVE** button!</u>

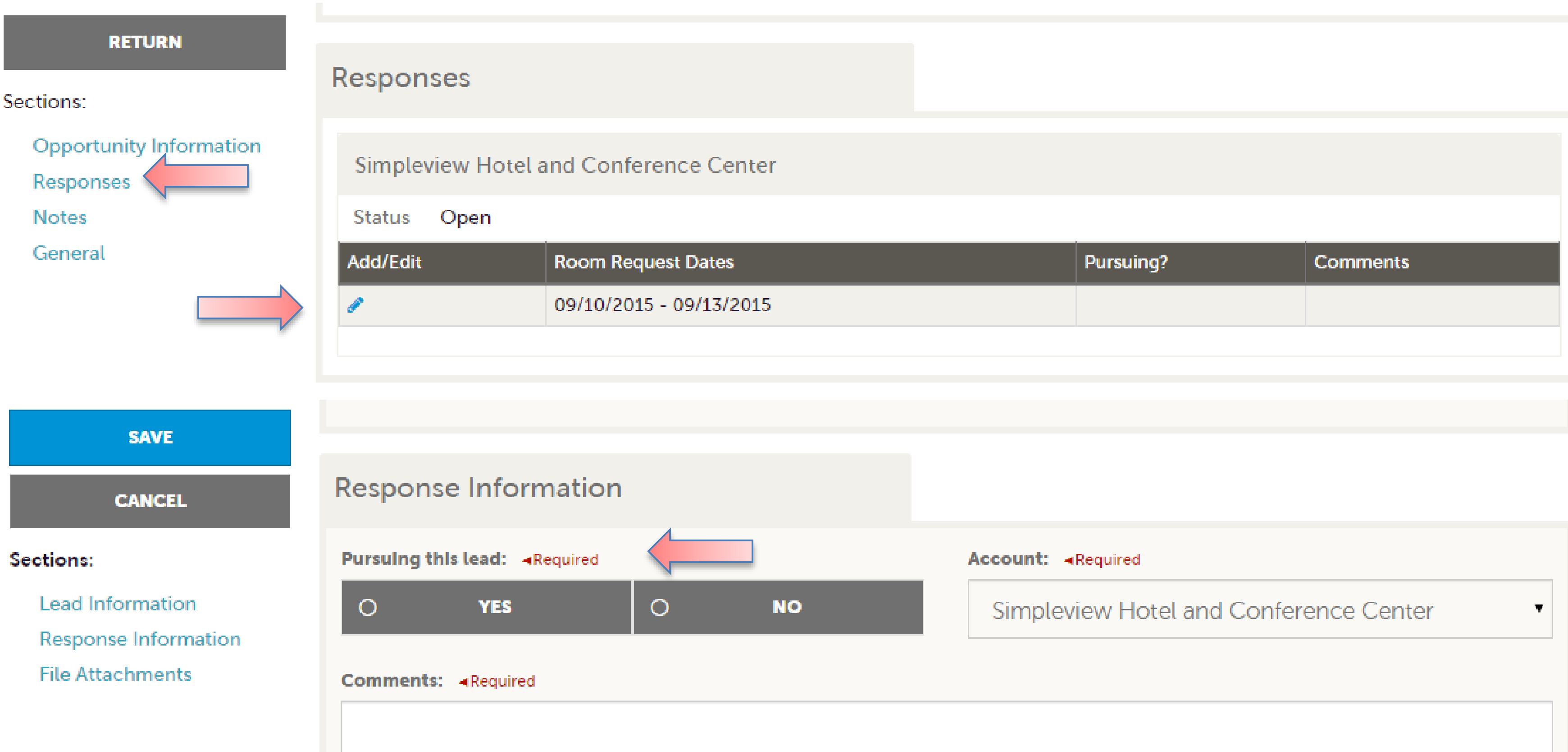
Opportunities – Media Leads



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.

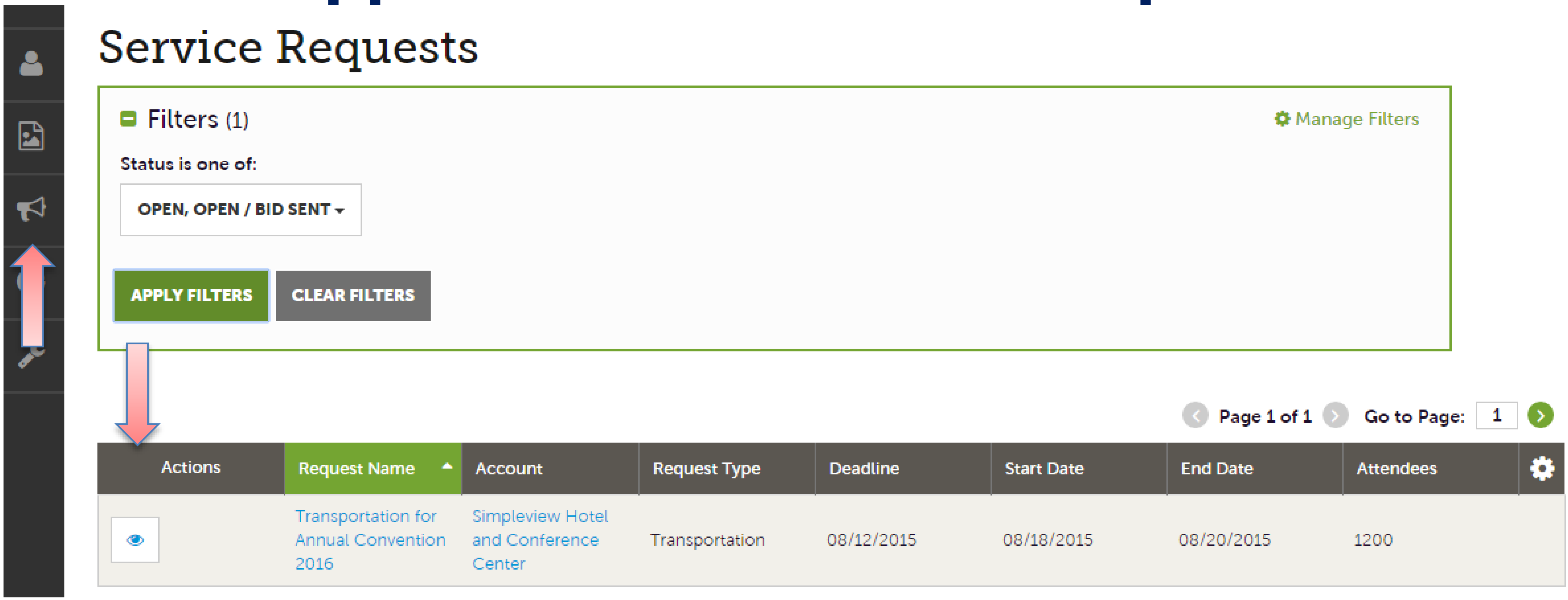
Note: Media Leads function the same as Sales and Tour Leads including their statuses. See Opportunities – RFPs section for more details on this.

Opportunities – Media Leads (cont'd)



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.

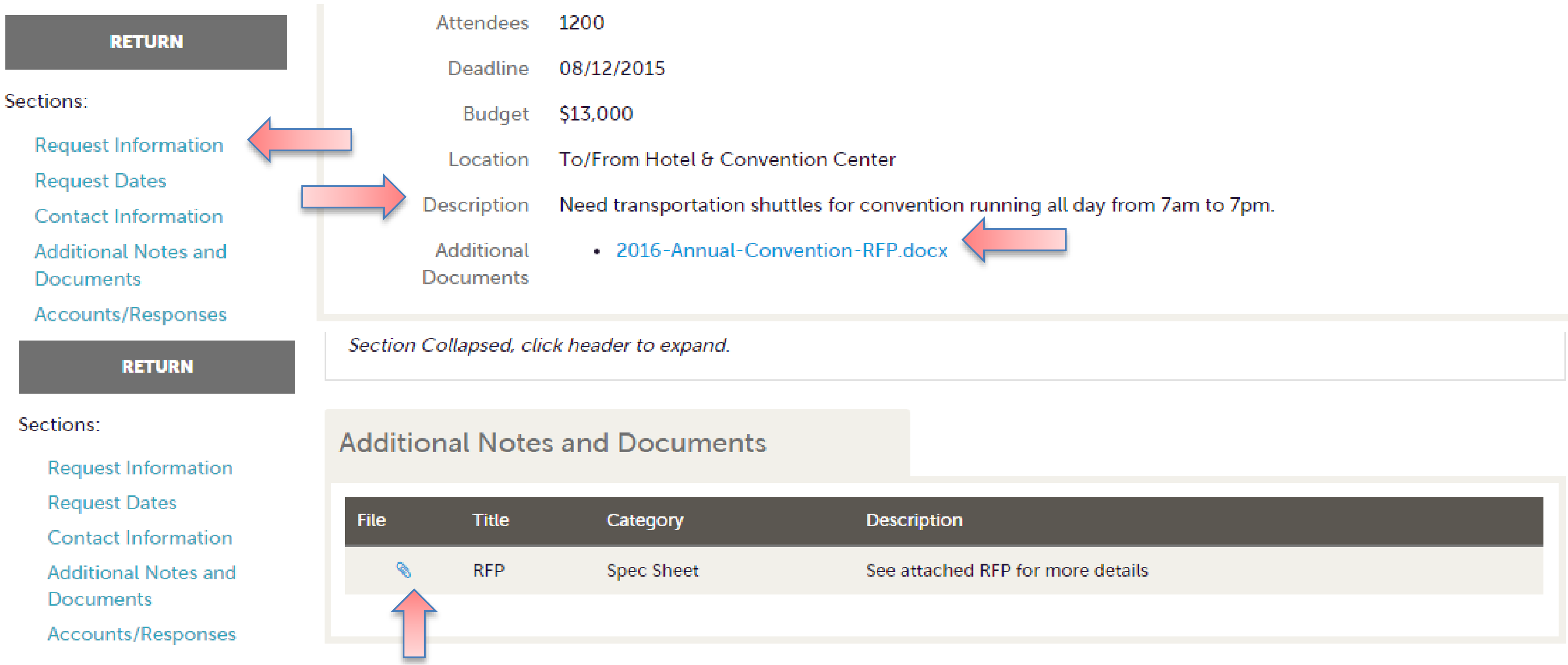
Opportunities – Service Requests



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…

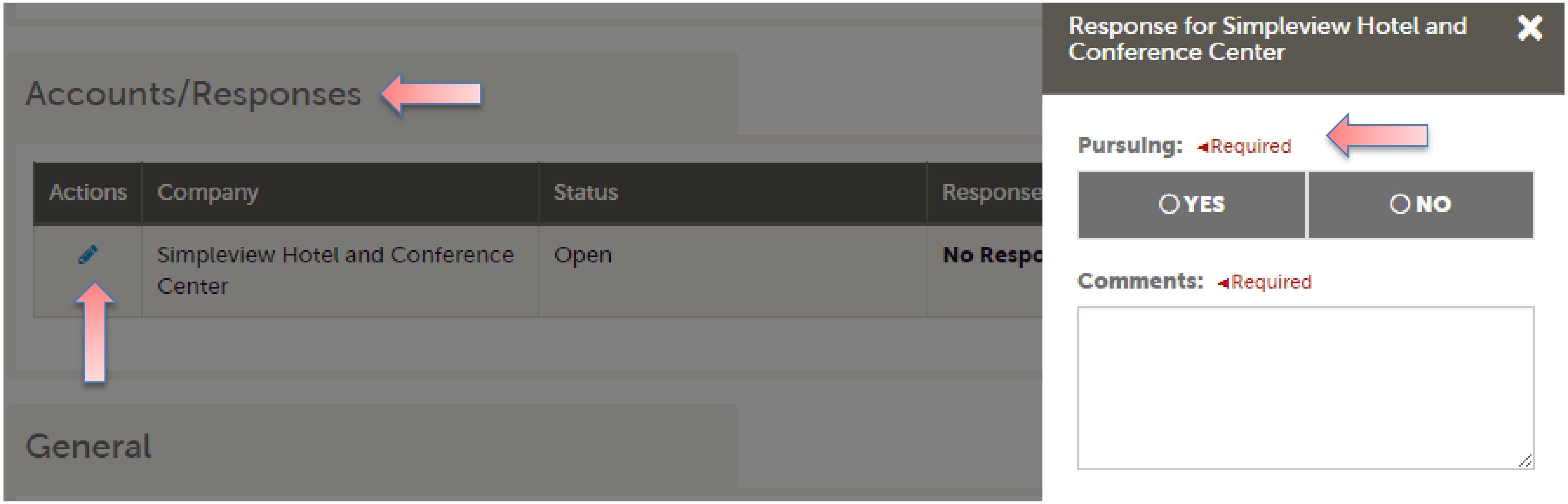
Once you have adjusted your filters as you prefer, click the **Eyeball** icon to view detailed information about the service request or click the name of the request.

Opportunities – Service Requests (cont'd)



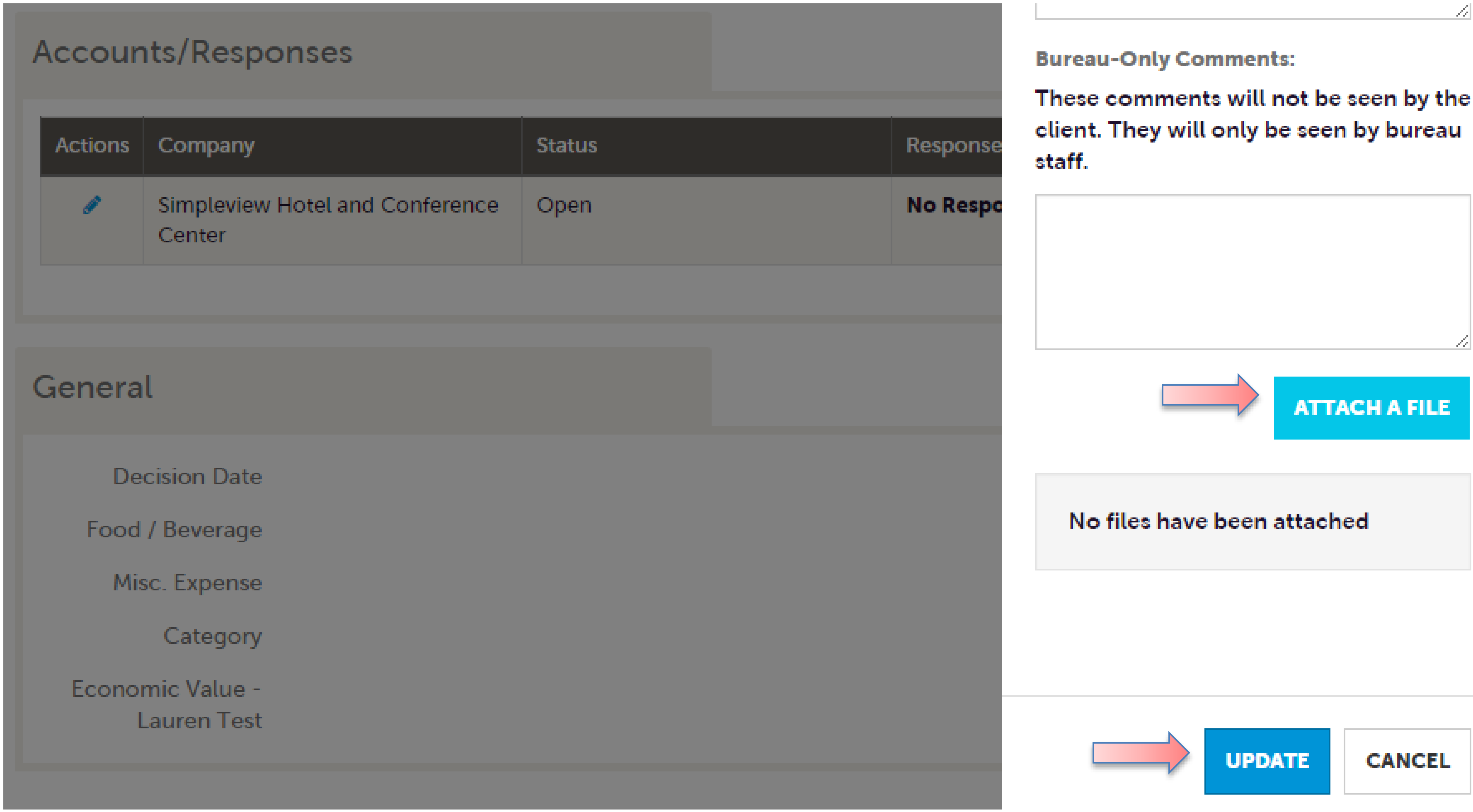
When viewing the Service Request, you can get detailed information in the **Request Information** section along with RFP attachment downloads.

Opportunities – Service Requests (cont'd)



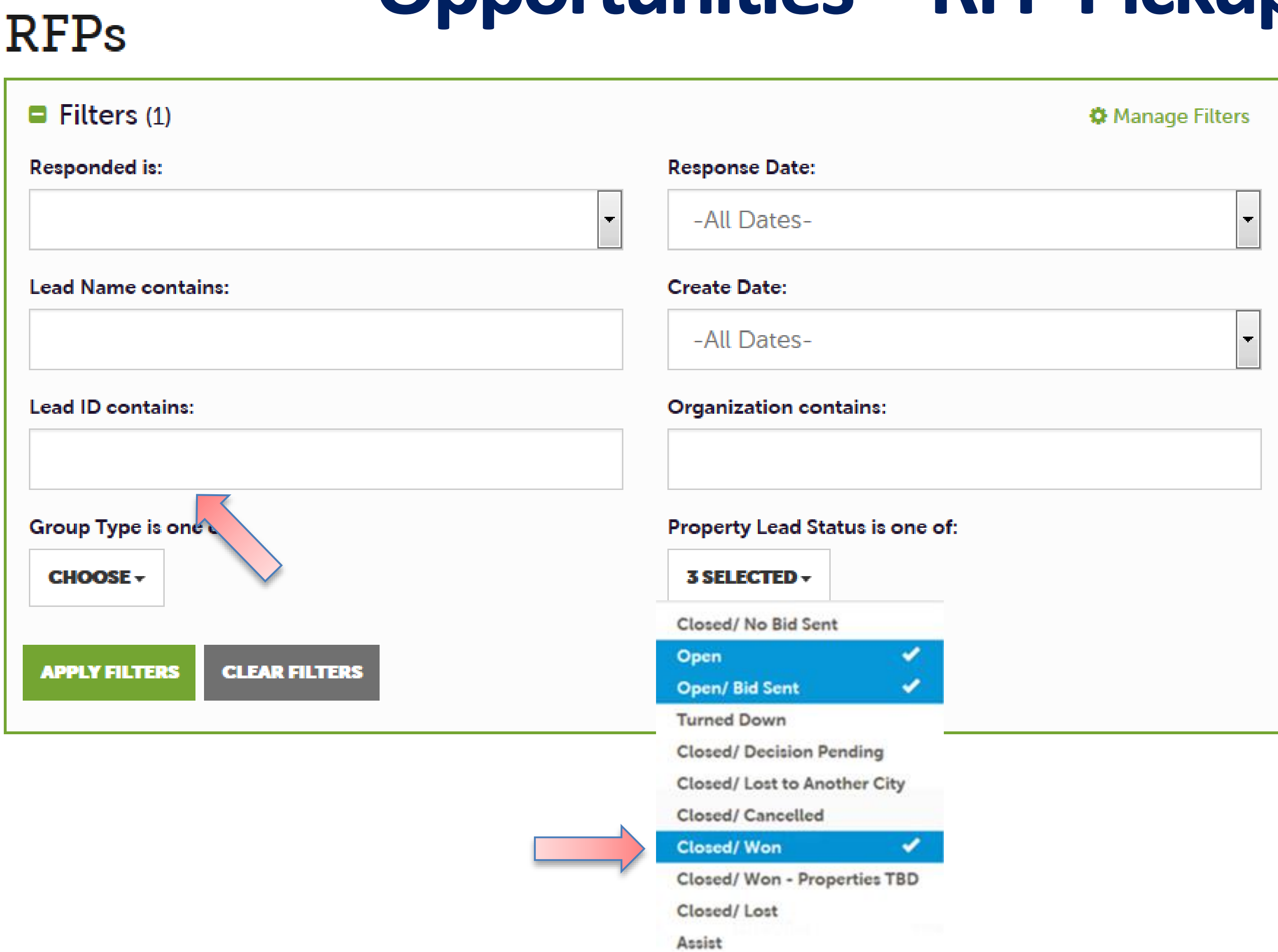
If the Response Due Date has not passed, you are able to add/edit a response by clicking the **Pencil** icon in the **Accounts/Responses** section of the Service Request. Once clicked, you can tell Visit Frederick if you are pursuing this piece of business by clicking the Yes or No option in the **Pursuing** section to the right side of the page.

Opportunities – Service Requests (cont'd)



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



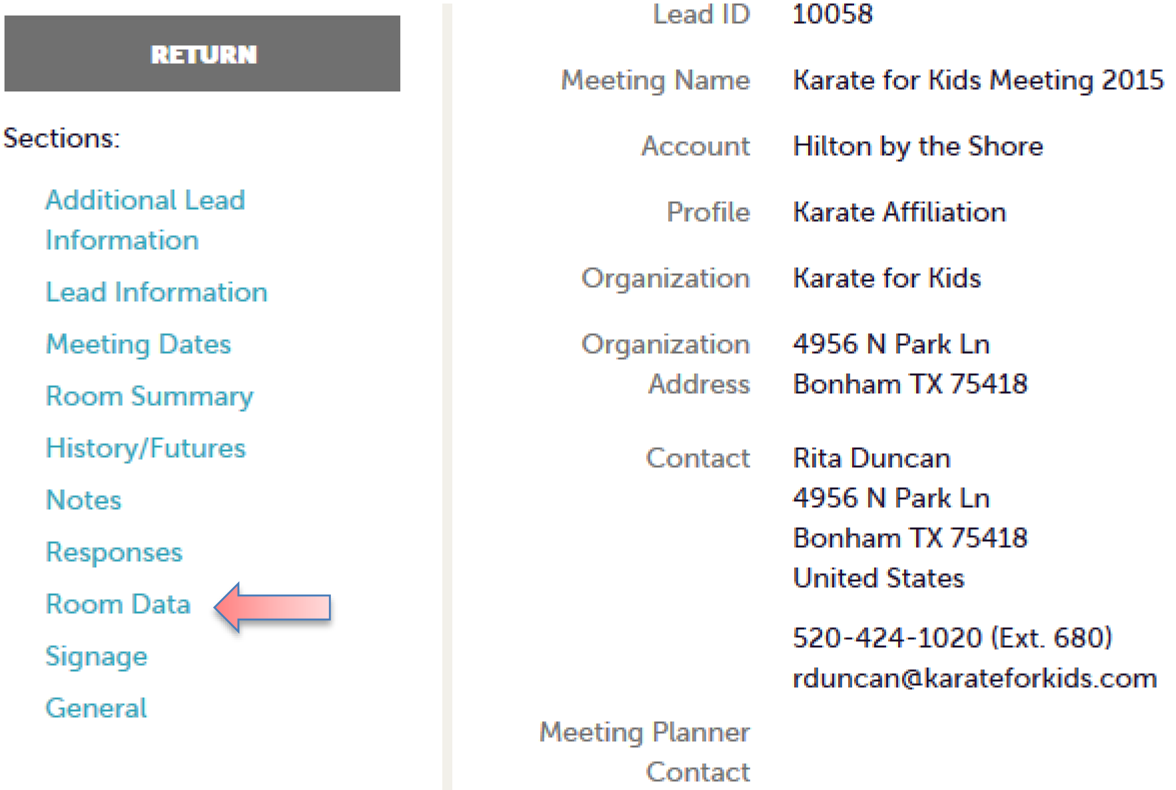
To see what past business is available for your property to report pick up on, you will need to access the **RFP Page**. Adjust the **Filter Grid** to include a status of **Closed / Won** and then apply filters. To limit the results to a specific Lead, you can provide the **Lead ID**.

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	Simpletimez 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)



When viewing the Lead, you can skip to difference 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.

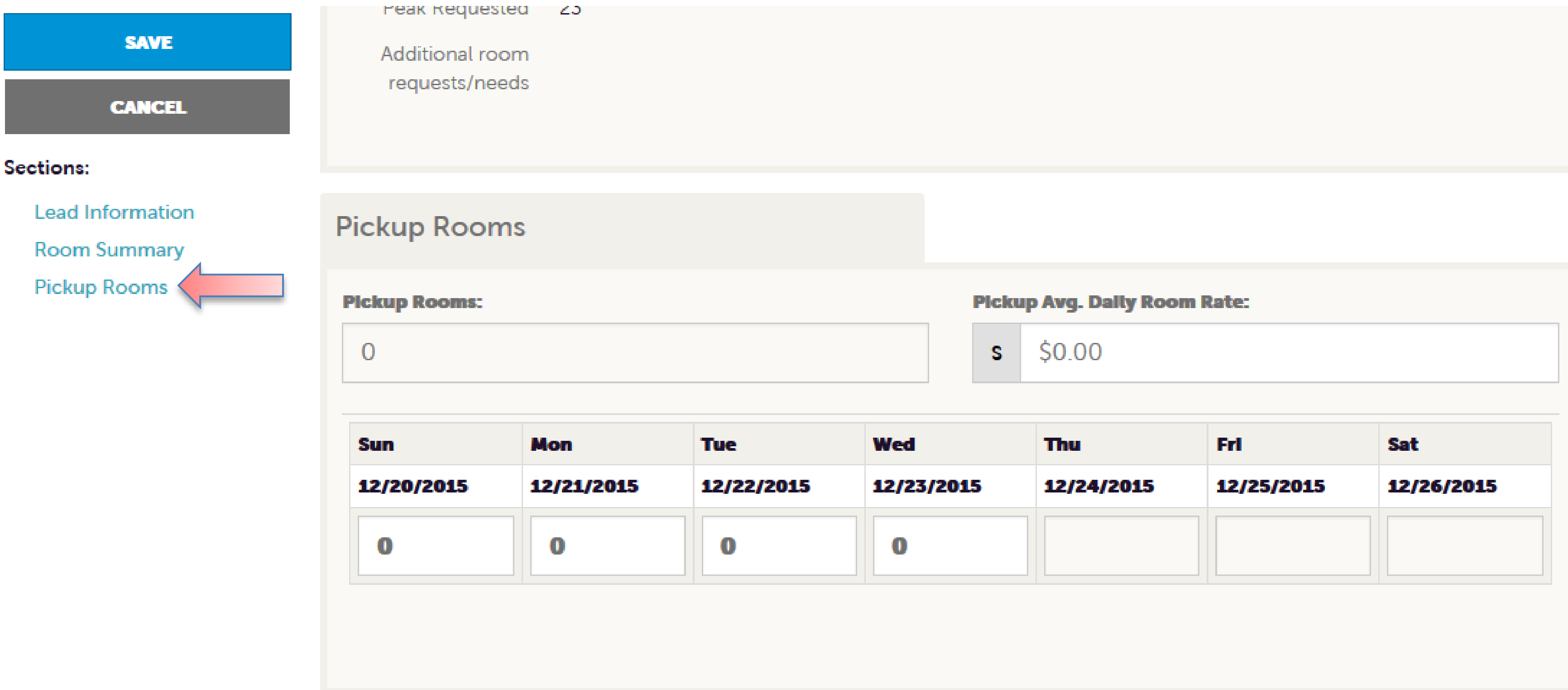
Opportunities – RFP Pickup (cont'd)

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)



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.