



Extranet User Instructions

Login Screen

Simpleview Demo CRM Partners

[Forgot Password?](#)

simpleview 

[LOGIN](#)



Home Screen

The screenshot shows the Simpleview Home Screen dashboard. At the top, there is a navigation bar with the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A search icon is on the far right. On the left, a vertical sidebar contains icons for home, user profile, documents, announcements, charts, and tools. The main content area is divided into three sections: 'At A Glance', 'Partner Bulletins', and 'Post Board'. The 'At A Glance' section features three colored cards: a purple card for 'Listing Views' (0), an orange card for 'Listing Click Throughs' (0), and a green card for 'Offer Views' (0). A red arrow points to the 'At A Glance' title, and a 'See All' link is to its right. The 'Partner Bulletins' section has a 'Show: All Bulletins' dropdown and lists three items: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. The 'Post Board' section displays three posts from 'Kara's Eco Hotel', 'City Center Hotel and Conference Center', and 'The Lauren Isely Resort'.

At A Glance is a brief view of your listing and special offers tracking. You can also click the See All link to the right to view more information about your property interaction with the bureau.



Home Screen (cont'd)

The screenshot displays the Simpleview Home Screen interface. At the top, the navigation bar includes the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A search icon is located on the far right. 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:

- At A Glance:** A section with three colored cards: a purple card for 'Listing Views' (0), an orange card for 'Listing Click Throughs' (0), and a green card for 'Offer Views' (0). A 'See All' link is positioned to the right of these cards.
- Partner Bulletins:** A section with a 'Show:' dropdown menu set to 'All Bulletins'. It lists three bulletins: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!', each with a 'View Full' link.
- Post Board:** A section for user posts. A red arrow points to a blue 'Add Post' button (a square with a pencil icon). Below it, three posts are listed:
 - Kara's Eco Hotel:** Dated 07/28/2015, with the text 'Can anyone post a reply? I can't figure it out!'. It has 1 comment and a mail icon.
 - City Center Hotel and Conference Center:** Dated 07/14/2015, with the text 'Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.'. It has 0 comments and a mail icon.
 - The Lauren Isely Resort:** Dated 07/13/2015, with the text 'Multi-Partner Sharing Bulletin' and 'Free concert on Saturday. Come hang out at the bar and enjoy local music.'. It has 0 comments and a mail icon.

Post Board allows you to communicate with other properties in your destination. By clicking on the caption bubble icon, you can reply to a post. You can also email the poster by clicking the mail icon.



Home Screen (cont'd)

The screenshot shows the Simpleview Home Screen. At the top is a navigation bar with the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A search icon is on the far right. A vertical sidebar on the left contains icons for home, user profile, documents, announcements, charts, and settings. The main content area is divided into three sections: 'At A Glance', 'Partner Bulletins', and 'Post Board'. 'At A Glance' features three colored boxes: a purple box for '0 Listing Views', an orange box for '0 Listing Click Throughs', and a green box for '0 Offer Views'. 'Partner Bulletins' has a dropdown menu set to 'All Bulletins' and a list of three items: 'Partner Bulletin Test' (marked with a blue and white exclamation point), 'Weather warning' (marked with a blue and white exclamation point), and 'Review Your Visitors Guide Information!!!!' (marked with a blue and white exclamation point). A red arrow points to the 'Partner Bulletin Test' item. 'Post Board' 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 red 'X' icon.

Partner Bulletins are important notices, documentation, events, etc... 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
- Invoices

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

By clicking the Profile icon, you can view/edit your property information, contacts associated with your property, view information about your property interaction with the bureau (same as the See All link in the At A Glance section), and view and pay invoices sent to you by the bureau. More on these options later in the presentation.



Home Screen (cont'd)

The screenshot shows the Simpleview Extranet interface. At the top, the Simpleview logo is on the left, followed by 'Extranet', 'Simpleview Demo CRM Partners', the user 'user@simpleviewinc.com', and a 'Logout' link. A search bar on the right contains 'Simpleview Hotel and Conference Center'. A left sidebar menu is open, with a red arrow pointing to the 'Collateral' icon. The sidebar menu includes: Collateral (Manage your Collateral), Listings, Special Offers, Calendar of Events, Media, Occupancy, and Materials Request. The main content area has two summary cards: 'Listing Click Throughs' (0) and 'Offer Views' (0). A 'Post Board' on the right shows two posts: 'Kara's Eco Hotel' (07/28/2015) with the text 'Can anyone post a reply? I can't figure it out!' and 'City Center Hotel and Conference Center' (07/14/2015) with the text 'Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.'

By clicking the Collateral icon, you can view/edit/add your listings/publication guides, special offers, calendar of events, media (i.e. images), occupancy data, and request materials 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.



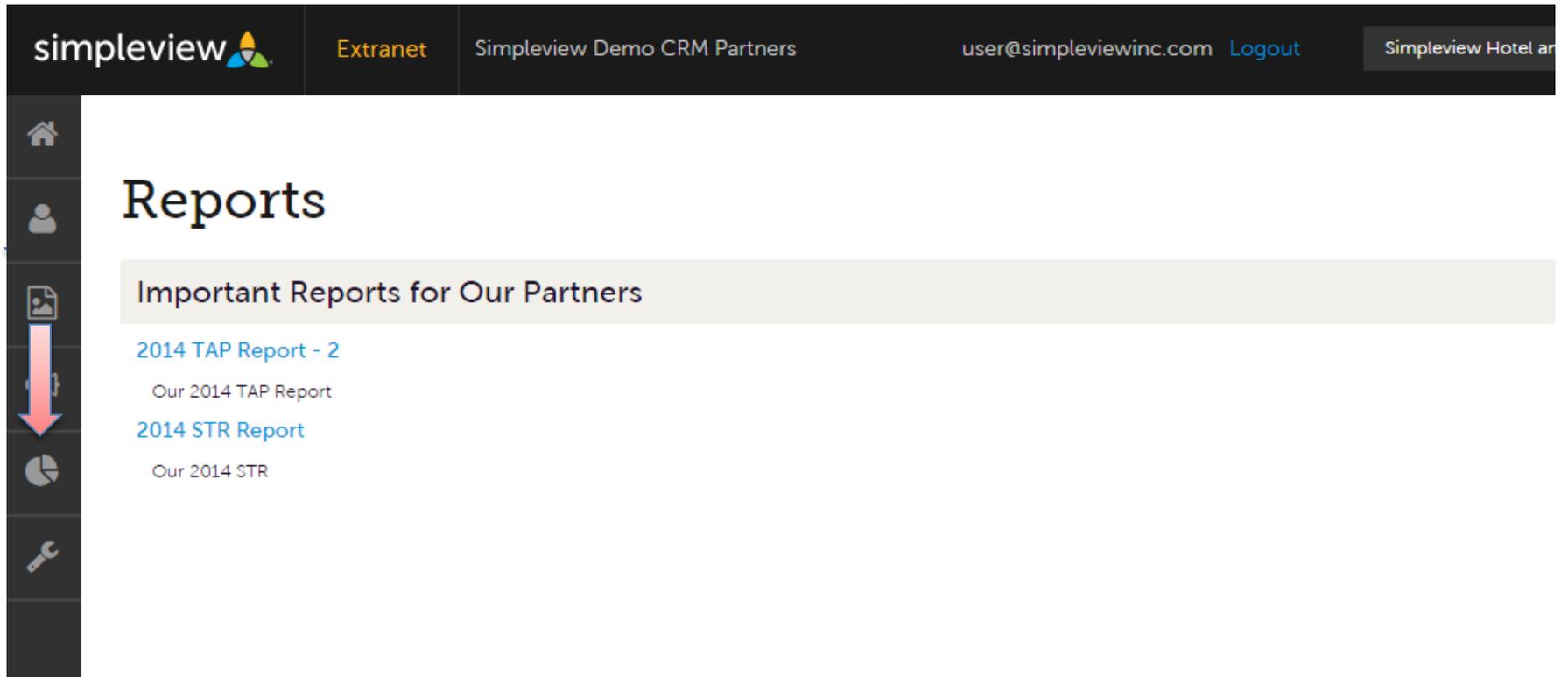
Home Screen (cont'd)

The screenshot displays the Simpleview Home Screen interface. At the top, the navigation bar includes the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. On the left, a teal sidebar is titled 'Opportunities' with the subtitle 'Manage your Opportunities'. It lists three categories: 'RFPs', 'Media Leads', and 'Service Requests'. A red arrow points to the 'Opportunities' icon. The main content area features two cards: an orange card for 'Listing Click Throughs' (0) and a green card for 'Offer Views' (0). A 'See All' link is positioned above the cards. On the right, a 'Post Board' section shows two pinned posts. The first post is from 'Kara's Eco Hotel' dated 07/28/2015, with the text 'Can anyone post a reply? I can't figure it out!' and one comment icon. The second post is from 'City Center Hotel and Conference Center' dated 07/14/2015, with the text 'Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.' and zero comment icons.

By clicking the Opportunities icon, you can view and respond to RFP's sent to you by the bureau. Opportunities are broken in RFP's (meeting and tour leads), Media Leads (travel writer RFP's), Service Requests (non-room specific RFP's). More on these options later in the presentation.



Home Screen (cont'd)



The screenshot displays the Simpleview Extranet interface. At the top, the Simpleview logo is on the left, followed by 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', and a 'Logout' link. A 'Simpleview Hotel an' button is also visible. On the left sidebar, there are icons for Home, Profile, Reports (highlighted with a red arrow), Dashboard, and Settings. The main content area is titled 'Reports' and features a section 'Important Reports for Our Partners' with two report entries: '2014 TAP Report - 2' (with sub-item 'Our 2014 TAP Report') and '2014 STR Report' (with sub-item 'Our 2014 STR').

By clicking the Reports icon, you can view reports the bureau has posted for you. To view a report just click the name of the report.



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
	<ul style="list-style-type: none">Manage AmenitiesManage Meeting Space

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 of the left of the page. If you are viewing the account, the button in the top left will say Edit. If you are editing the account, the top left button will say Save. You must click the Save button before any of your changes are actually saved!



Manage Profile - Contacts

Contacts

Filters (0) Manage Filters

Account is one of: CHOOSE ▾

Contact Type is: ▾

APPLY FILTERS

ADD CONTACT ←

Page 1 of 1 Go to Page: 1

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

After you click the Profile icon and then Contacts, you will be presented with a list of all the contacts associated with your property. On this page you can Add, Edit, View, and Clone (i.e. duplicate) a contact depending upon your extranet permissions.



Manage Profile - Contacts (cont'd)

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

First Name: Required

Angel

Last Name: Required

Berry

Full Name: Required

Angel Berry

Department:

Title:

Contact Type: Required

Primary

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 button in the top left will say Edit. If you are editing a contact, the top left button will say Save. You must click the Save button before any of your changes are actually saved!

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

Benefits

- Listings
- Offers
- Fam Trips
- Events
- Leads/RFPs
- Service Requests
- Inkind/Expenses
- Social Mentions
- Press Mentions



FROM

Month

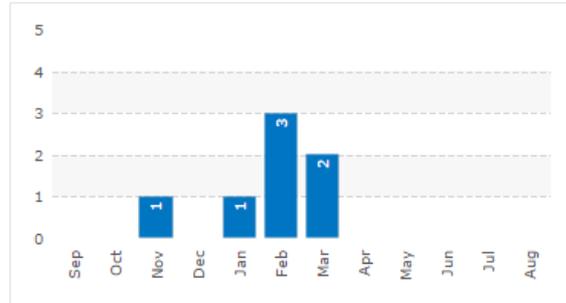
September

Year

2014

Listings [See Details](#)

Views

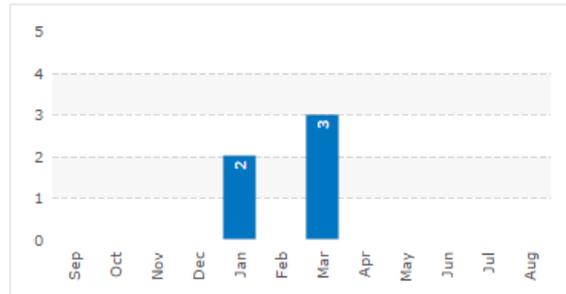


Offers [See Details](#)



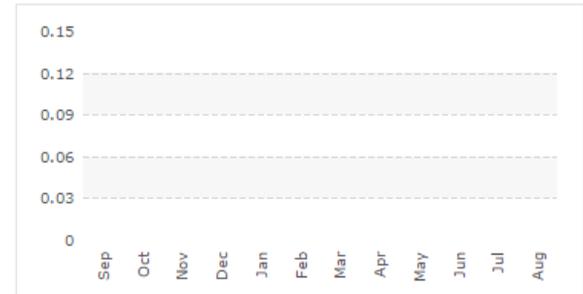
Press Mentions [See Details](#)

Mentions



Events [See Details](#)

Attended



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



Manage Profile - Invoices

Invoices

+ 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	Invoice ID	Account	Type	Invoice Date	Invoice Amount	Paid Amount	Balance Due	Payment Date	Description	⚙
 	1565	Simpleview Hotel and Conference Center	Membership	11/13/2009	\$2,060.00	\$0.00	\$2,060.00		Test	
 		Simpleview Hotel and Conference Center	Membership	12/02/2014	\$300.00	\$0.00	\$300.00			

After you click the Profile icon and then Invoices, you will be presented with a list of invoices sent to your property. To view the details of the invoice you can either click the eyeball icon or the Print icon. To pay an invoice, click the eyeball icon to first view the invoice.



Manage Profile - Invoices (cont'd)

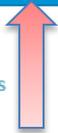
RETURN

PRINT INVOICE

PAY NOW

Sections:

- Recipient Details
- Invoice Details
- Payment Details
- General



Type Membership

Description Test

Invoice Date 11/13/2009

Due Date 11/13/2009

Invoice Amount \$2,060

Paid Amount \$0

Balance Due \$2,060

Payment Date

Payment Method

Payment Details

Actions	Payment ID	Payment Method	Payment Date	Amount
No Records Were Found				

When viewing an invoice you can see the payment history associated to the invoice. If the invoice has an outstanding balance, you will see a Pay Now button in the top left of the page. Paying Now will take you to a secure page to pay using a credit card much like any online payment portal on the internet.

NOTE: Pay Now will only appear if this feature has been enabled by the bureau.



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 Page 1 of 1 Go to Page: 1

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

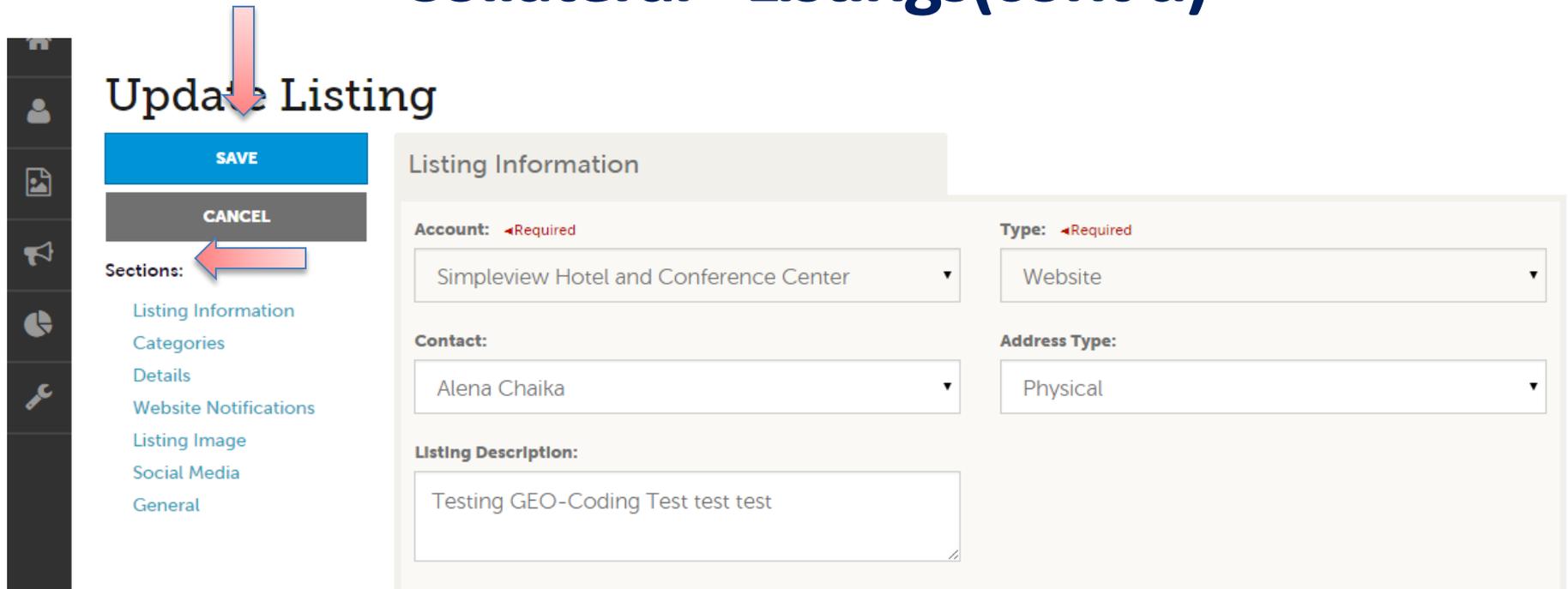
Page 1 of 1 Go to Page: 1

After you click the Collateral icon and then Listings, you will be presented with your property's listings. These listings may be website listings or publication guide listings. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information. The clone icon will allow you to duplicate a listing. You can also create a new listing by clicking the Add Listing button.

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



Collateral - Listings(cont'd)



Update Listing

SAVE

CANCEL

Sections:

- Listing Information
- Categories
- Details
- Website Notifications
- Listing Image
- Social Media
- General

Listing Information

Account: Required
Simpleview Hotel and Conference Center

Type: Required
Website

Contact:
Alena Chaika

Address Type:
Physical

Listing Description:
Testing GEO-Coding Test test test

When you view, edit, or add (if enabled) a listing, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a listing, the button in the top left will say Edit. If you are editing a listing, the top left button will say Save. You must click the Save button before any of your changes are actually saved! **IMPORTANT NOTE:** Any edits or adding of listings will require approval from the bureau. Upon saving your updates, the bureau will be notified of your changes/adds.



Collateral - Listings(cont'd)

SAVE

CANCEL

Sections:

- Listing Information
- Categories
- Details
- Website Notifications
- Listing Image
- Social Media
- General

Email To Notify:

Notification Interval:

Listing Image

Listing Images:

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 in the previous slide; Any edits or adding of listings will require approval from the bureau. Upon saving your updates, the bureau will be notified of your changes/adds. 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 button will say Save. You must click the Save button before any of your changes are actually saved! 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 Page 1 of 1 Go to Page: 1

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

Page 1 of 1 Go to Page: 1

After you click the Collateral icon and then Calendar of Events, you will be presented with your property's events. The pencil icon will allow you to edit an existing event. By clicking the eyeball icon, you can view the existing event. The clone icon will allow you to duplicate an event. You can also create a new event by clicking the Add Event button.



Collateral – Special Calendar of Events (cont'd)

Update Event

SAVE **CANCEL**

Sections:

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

Event Information

Account: Required
Simpleview Hotel and Conference Center

Title: Required
Simpleview Festival

Featured:
 YES NO

Contact:
Shawn Wilkins

Admission:

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

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 button in the top left will say Edit. If you are editing an event, the top left button will say Save. You must click the Save button before any of your changes are actually saved!

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



Collateral – Special Calendar of Events (cont'd)

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

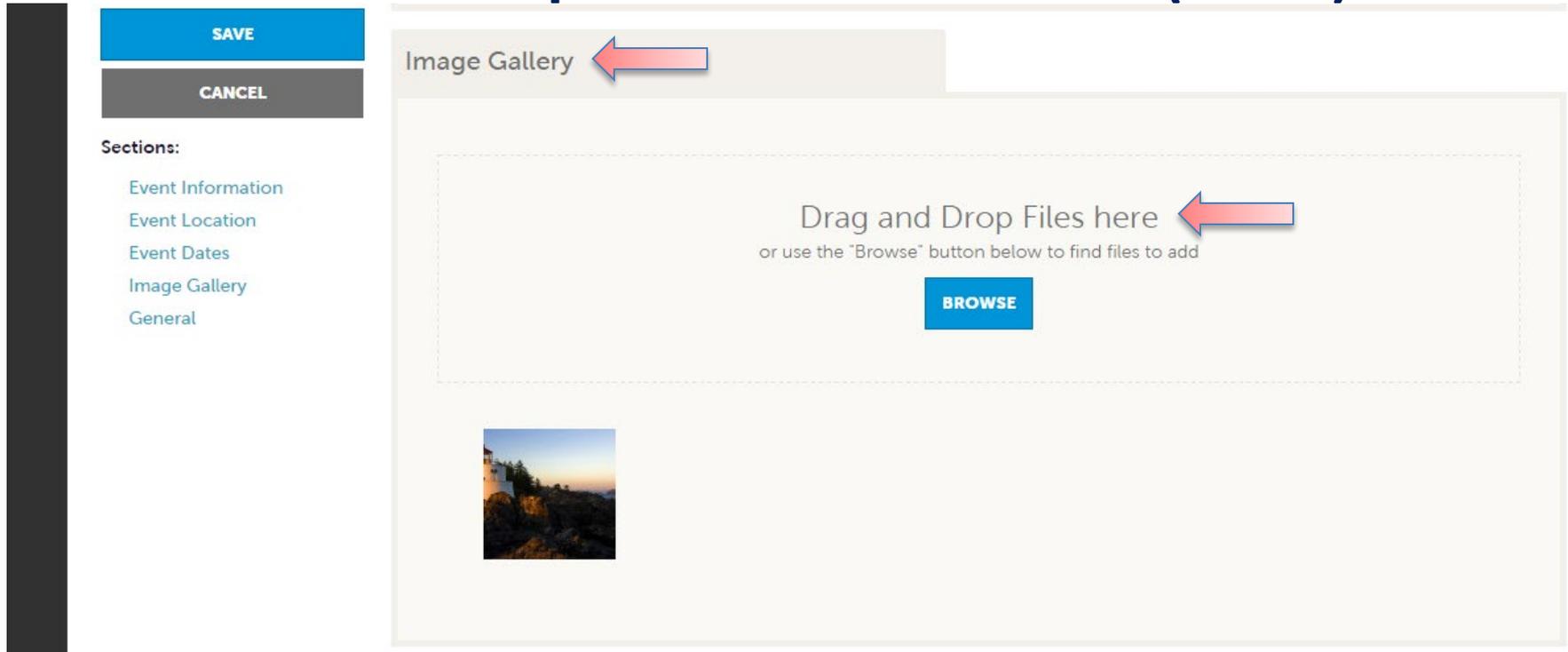
End after 0 occurrences

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 (cont'd)



The screenshot shows a user interface for managing an event. On the left, there is a sidebar with a dark grey background. At the top of the sidebar are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is the heading 'Sections:' followed by a list of menu items: 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The 'Image Gallery' item is highlighted. The main content area is titled 'Image Gallery' and features a large dashed-line box with the text 'Drag and Drop Files here' and 'or use the "Browse" button below to find files to add'. A blue 'BROWSE' button is positioned below the dashed box. A small thumbnail image of a landscape is visible in the bottom left corner of the main area. Red arrows point to the 'Image Gallery' title and the 'Drag and Drop Files here' text.

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 to possibly be used in 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 shows a web form for managing media. On the left is a dark sidebar with a wrench icon. The main form has a top bar with 'SAVE' and 'CANCEL' buttons. Below this is a 'Sections:' menu with 'Media Information' selected. The form fields include: a dropdown menu currently set to 'Image'; a 'Description:' text area; a 'File:' section with a dashed box containing the text 'Drag and Drop File To Page or use the "Browse" button below to find a file to add', a 'BROWSE' button, and a 'REMOVE' button; and a 'Listings:' dropdown menu currently set to 'CHOOSE AMONG THE FOLLOWING...'. Two red arrows point to the 'File:' area and the 'Listings:' dropdown.

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.



Collateral – Occupancy

Occupancy

Filters (0) [Manage Filters](#)

Year between: and

APPLY FILTERS

Page 1 of 1 Go to Page:

Actions	Year	Percent Occupied (Avg)	Last Updated	
	2013	100	07/07/2015	
	2014			
	2015			

After you click the Collateral icon and then Occupancy, you will be presented options to enter your hotel occupancy numbers by year. Click the pencil icon next to the year to enter/edit your occupancy numbers.



Collateral – Occupancy (cont'd)

Update Occupancy

Account: Year: Entry Mode: BY PERCENT BY OCCUPANCY

You have unsaved changes

Simpleview Hotel and Conference Center					
Year	Month	% Occupied	Rms Occupied	Available	Rate
2015	January	<input type="text" value="88.00"/>	<input type="text" value="1,056"/>	<input type="text" value="1,200"/>	<input type="text" value="\$175.00"/>
2015	February	<input type="text" value="93.00"/>	<input type="text" value="1,116"/>	<input type="text" value="1,200"/>	<input type="text" value="\$189.00"/>

Once you click the pencil icon to add/edit your occupancy number, you will be presented with a grid of all the month for that year. You can choose to enter your occupancy by percentage or by Rooms. As you enter this data, you will see the % Occupied or Rms Occupied fields auto-calculate based upon the data entered and the Available column data. As with all add/edit pages in the extranet, be sure to click the Save button!



Collateral – Materials Request

Materials Requests

Filters (0) Manage Filters

Status is:

APPLY FILTERS

ADD MATERIALS REQUEST Page 1 of 1 Go to Page: 1

Actions	Order ID	Send Date	Full Name	Company	City/State/Zip	Items Ordered	
  	1384	08/07/2015	Shawn Wilkins	Simpleview Hotel and Conference Center	Tucson, AZ 85741	300	

Page 1 of 1 Go to Page: 1

After you click the Collateral icon and then Materials Request, you will be presented with a list of orders you have submitted to the bureau. This feature will allow you to request collateral such as publication guides from the bureau. To request new materials click the Add Materials Request button. You can also edit, view, or clone (duplicate) an existing order by clicking the Pencil, Eyeball, or Clone icons.



Collateral – Materials Request (cont'd)



SAVE

CANCEL

Sections:

- Materials Request Information
- Attached To..
- Order Recipient
- Order Address
- Order Detail
- General

Order Detail



Image	Product	Price	Qty	Available
	Cactus Keychains	\$2.00	<input type="text" value="0"/>	1
	Cowboy Hat	\$80.00	<input type="text" value="0"/>	5
	Hoodie Sweatshirt	\$35.00	<input type="text" value="0"/>	127
	Pens	\$2.00	<input type="text" value="0"/>	12067
	Restaurant Week Tote Bags	\$0.00	<input type="text" value="0"/>	1878



Upon editing or creating a new request, you will be presented with an order form. Within the order form there is an Order Detail section where you can select from available inventory, just enter the Quantity of each product you are requesting. You will not be able to order more of a product than is in the Available column. Upon clicking the Save button, the bureau will be notified of your request.



Opportunities – RFPs

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 property's Sales and Tour Leads. Depending upon your filters will determine which leads you are presented. You can change your filters to narrow down your results 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 past.
- 2. Open:** These are leads in a tentative status that your property has not bid on yet and the response due date has not past.
- 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 past. 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 past thus you cannot edit your response.
- 6. Closed / Lost to Another City:** These are leads you were pursuing but the business has gone lost.
- 7. Closed Cancelled:** These are leads 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)

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 upon your chosen 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. On 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 the 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 past. 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 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		

If you are pursuing the piece of business, you can enter the number of rooms, by room type, you can commit to for this lead in the Room Information section of the response page



Opportunities – RFPs (cont'd)

SAVE

CANCEL



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 your hard drive 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:

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 RFP – 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

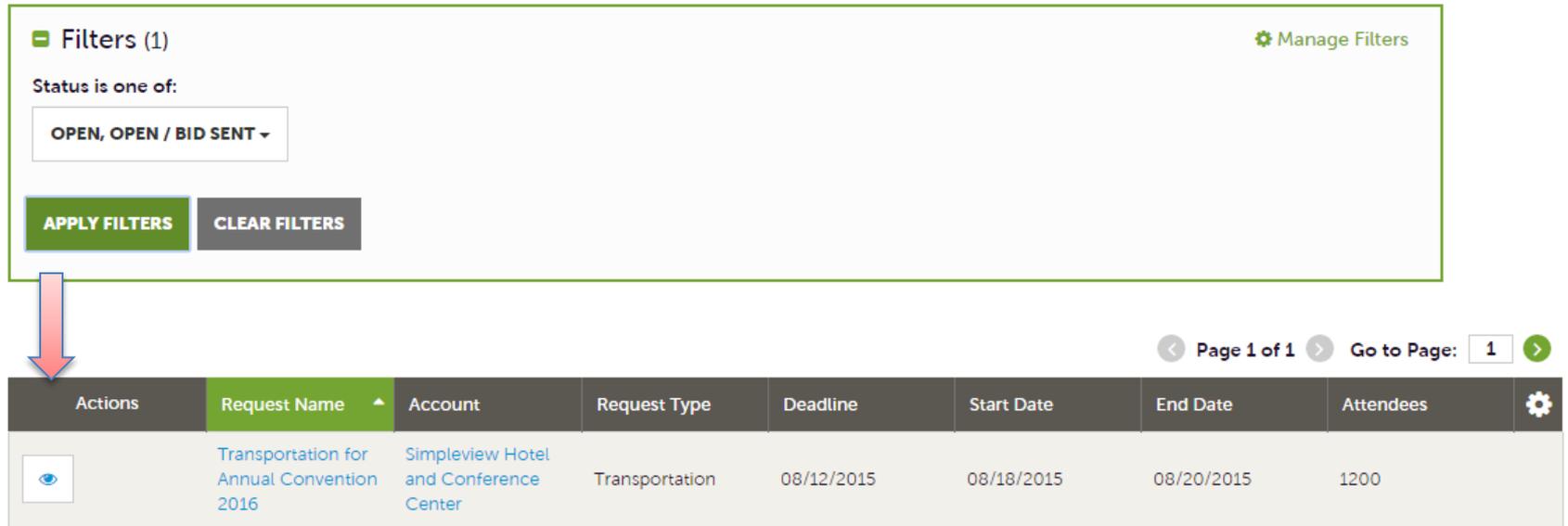
Comments: Required

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 – Service Requests

Service Requests



The screenshot displays the 'Service Requests' interface. At the top, there is a filter box titled 'Filters (1)' with a 'Manage Filters' link. The filter is set to 'Status is one of: OPEN, OPEN / BID SENT'. Below the filter are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons. A red arrow points from the 'APPLY FILTERS' button to the table below. The table has columns for Actions, Request Name, Account, Request Type, Deadline, Start Date, End Date, and Attendees. A single row is visible with an eye icon in the Actions column.

Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees
	Transportation for Annual Convention 2016	Simpleview Hotel and Conference Center	Transportation	08/12/2015	08/18/2015	08/20/2015	1200

By clicking the RFP icon and then selecting Service Requests, you can view non-room night specific leads sent to your property. These requests can range from transportation, audio/visual, catering, etc...

Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about a 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

Attendees 1200

Deadline 08/12/2015

Budget \$13,000

Location To/From Hotel & Convention Center

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

Additional Documents

- [2016-Annual-Convention-RFP.docx](#)

Section Collapsed, click header to expand.

RETURN

Sections:

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

Additional Notes and Documents

File	Title	Category	Description
	RFP	Spec Sheet	See attached RFP for more details

When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads. Depending upon the bureau's preferences, this information may be contained in the Additional Notes and Documents section of the service Request.



Opportunities – Service Requests (cont'd)

The screenshot displays a software interface for managing service requests. On the left, a table titled 'Accounts/Responses' is visible, with a red arrow pointing to the 'Pencil' icon in the 'Actions' column for the entry 'Simpleview Hotel and Conference Center'. The table has the following data:

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

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 and two radio buttons: 'YES' and 'NO'. Below this is a 'Comments:' section with a 'Required' label and a text input area.

If the Response Due Date has not past, 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 the bureau 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 Respo

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!

