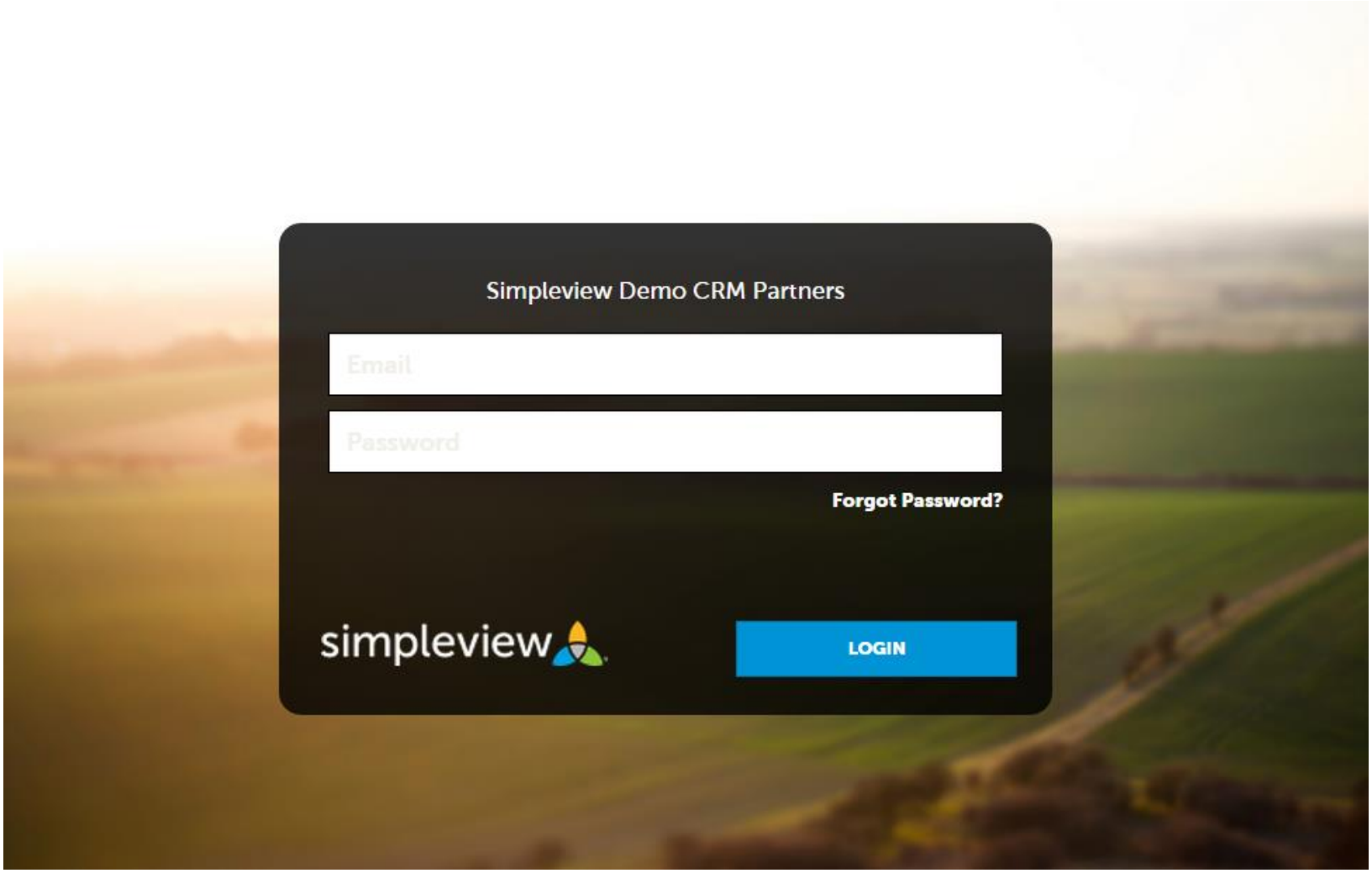
simpleview

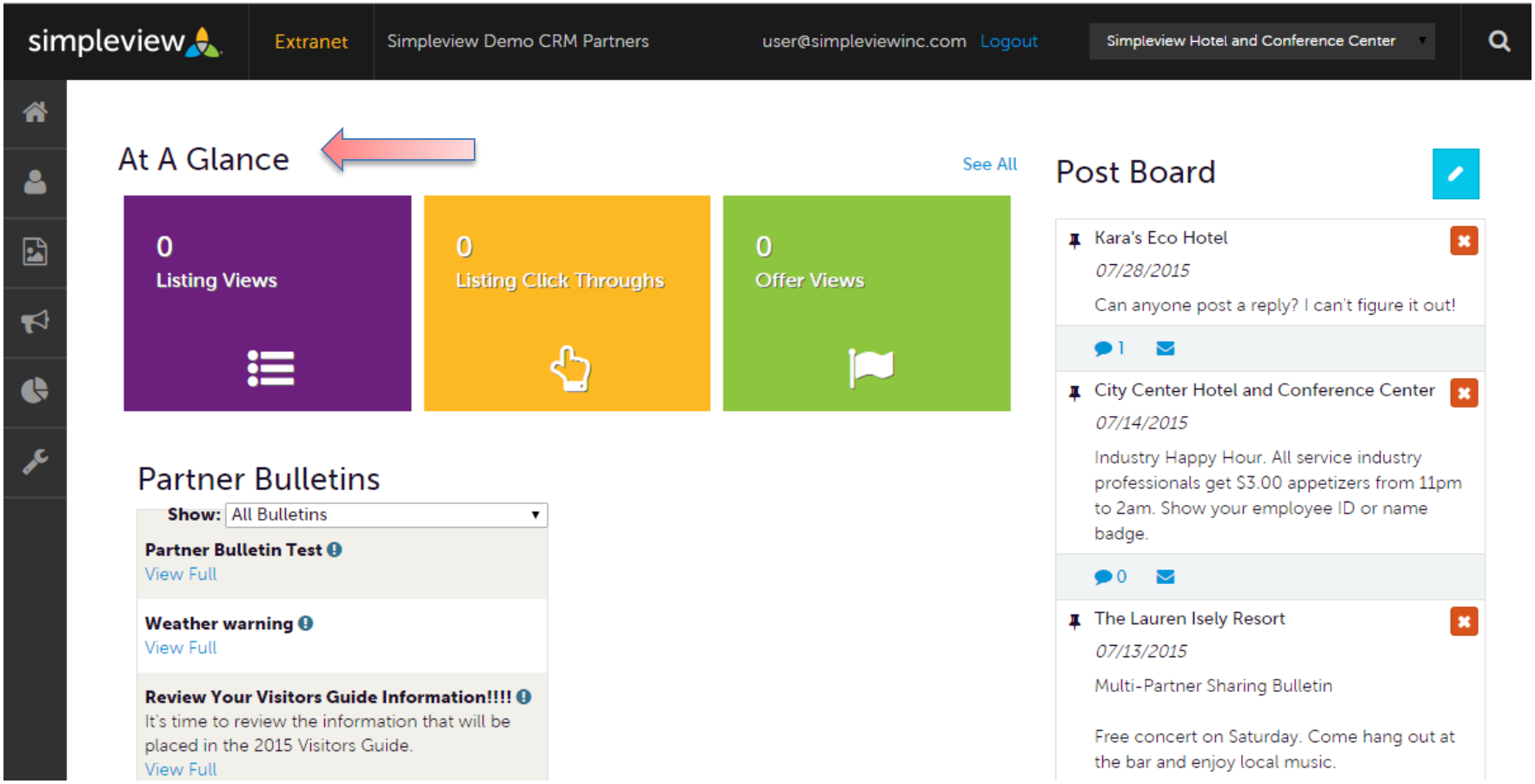
Extranet User Instructions

Laurel Highlands
PENNSYLVANIA

Login Screen



Home Screen



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)

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

At A Glance

See All

0 Listing Views

0 Listing Click Throughs

0 Offer Views

Partner Bulletins

Show: All Bulletins

Partner Bulletin Test
View Full

Weather warning
View Full

Review Your Visitors Guide Information!!!!
It's time to review the information that will be placed in the 2015 Visitors Guide.
View Full

Post Board

Kara's Eco Hotel
07/28/2015
Can anyone post a reply? I can't figure it out!
1

City Center Hotel and Conference Center
07/14/2015
Industry Happy Hour. All service industry professionals get $3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.
0

The Lauren Isely Resort
07/13/2015
Multi-Partner Sharing Bulletin

Free concert on Saturday. Come hang out at the bar and enjoy local music.

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)

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

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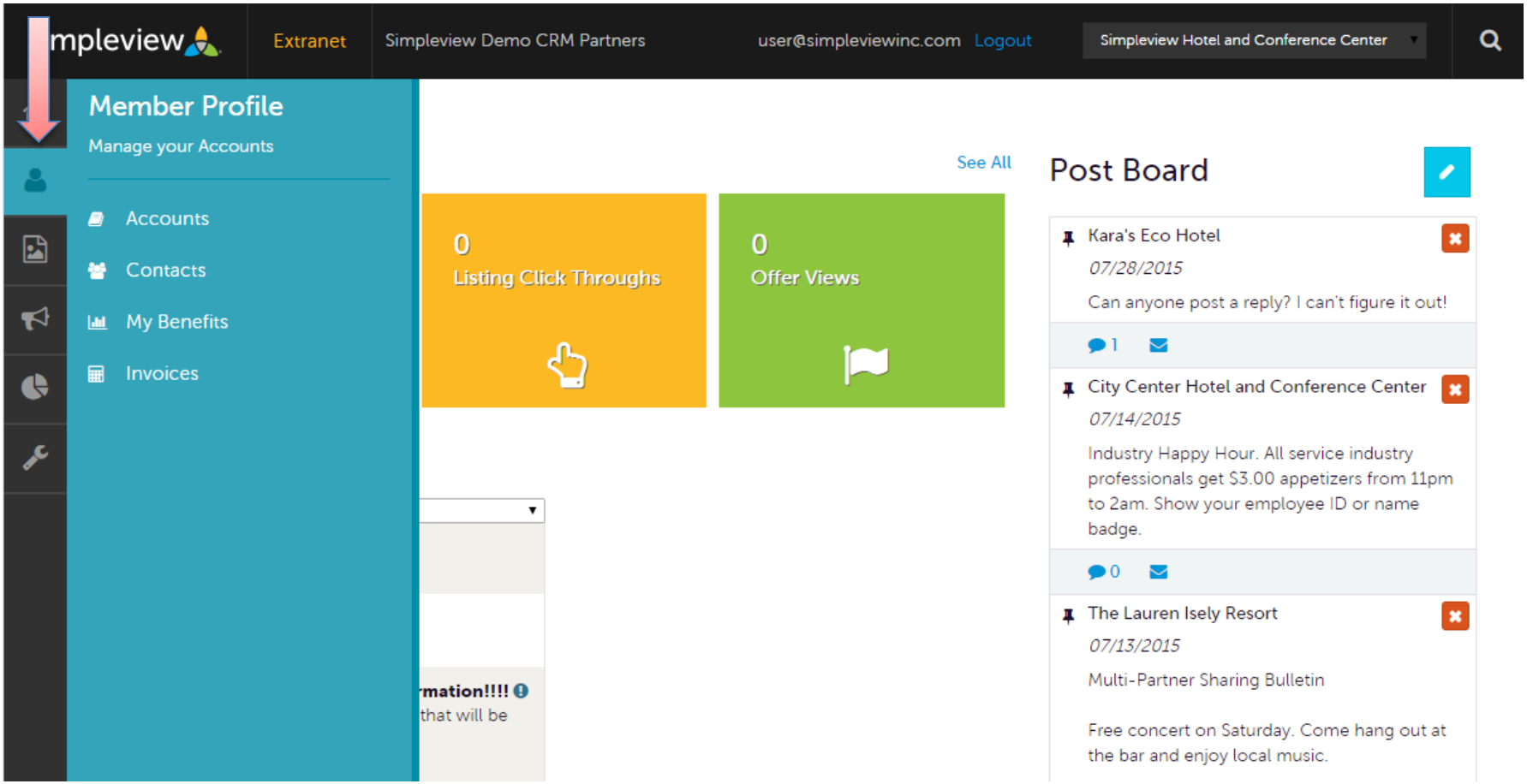
0

The Lauren Isely Resort
07/13/2015
Multi-Partner Sharing Bulletin

Free concert on Saturday. Come hang out at the bar and enjoy local music.

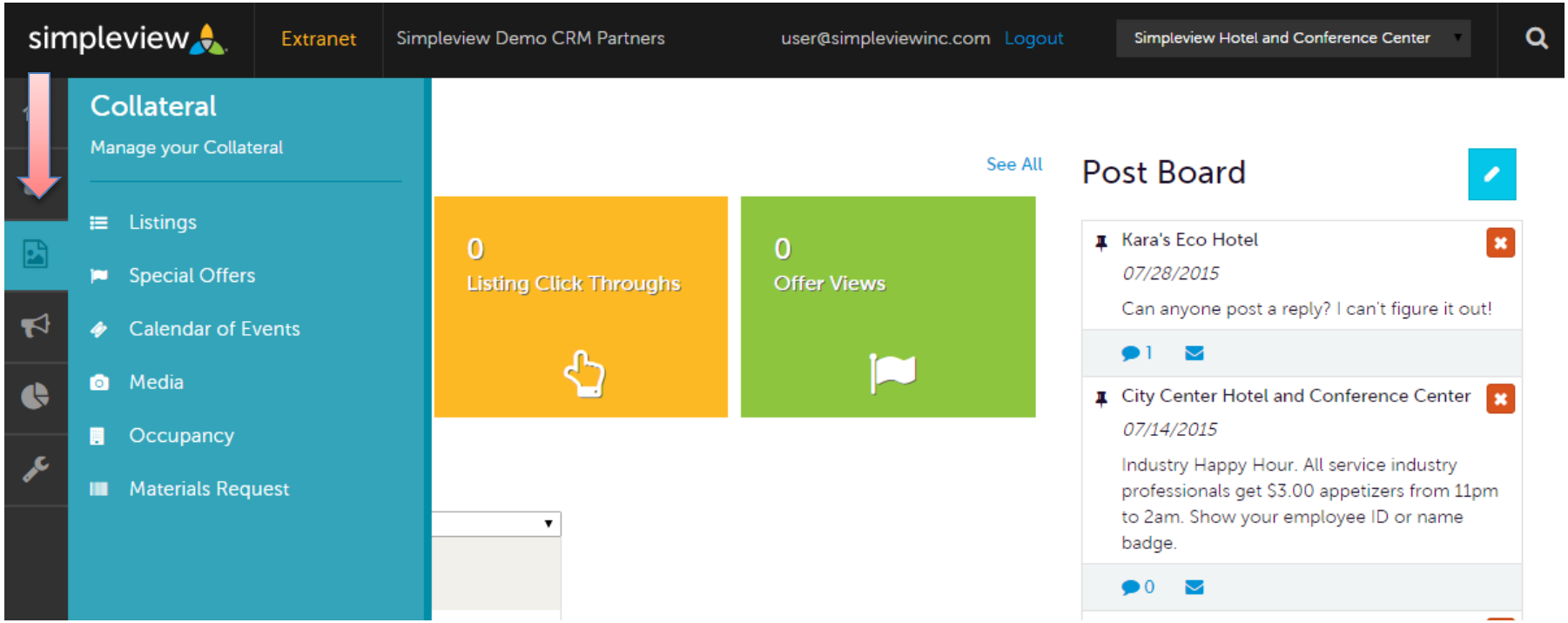
Partner Bulletins are important notices, documentation, events, etc… Important bulletins will be marked with a blue and white exclamation mark.

Home Screen (cont'd)



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.

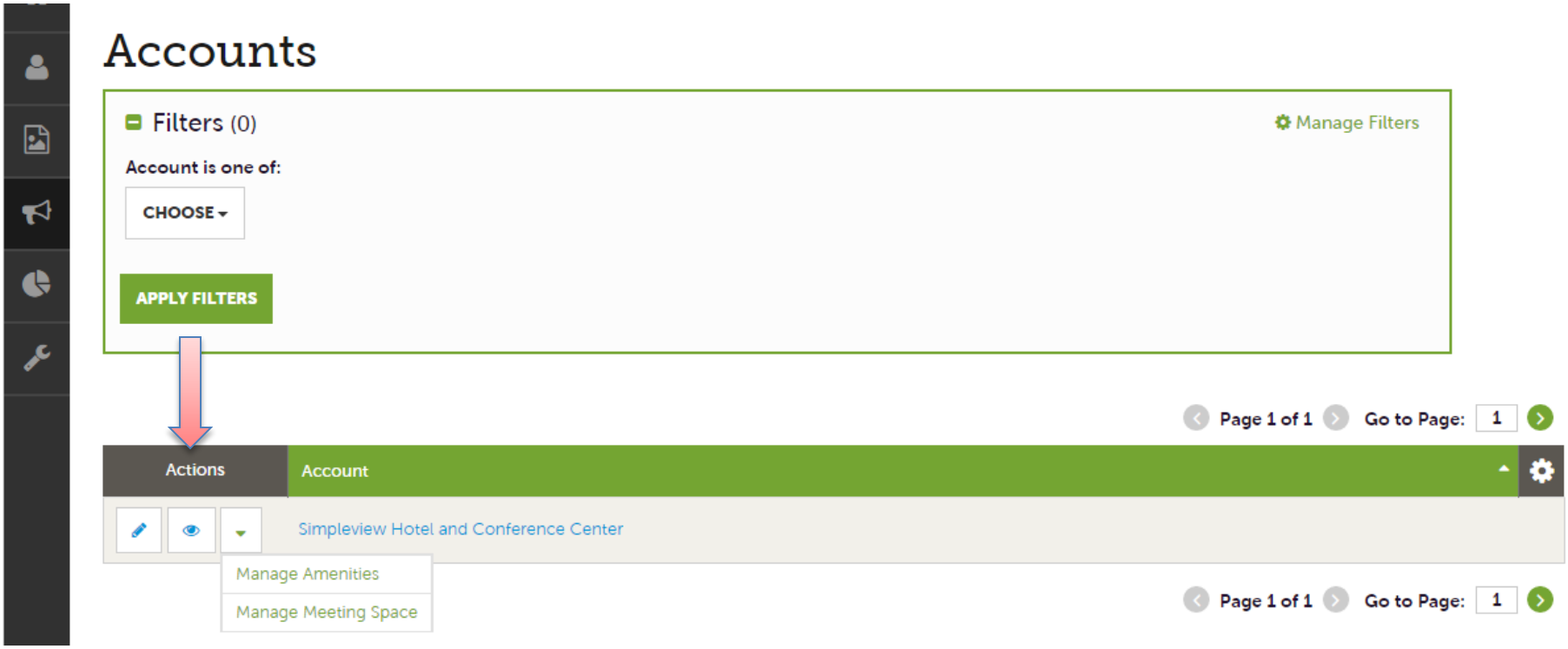
Home Screen (cont'd)



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.

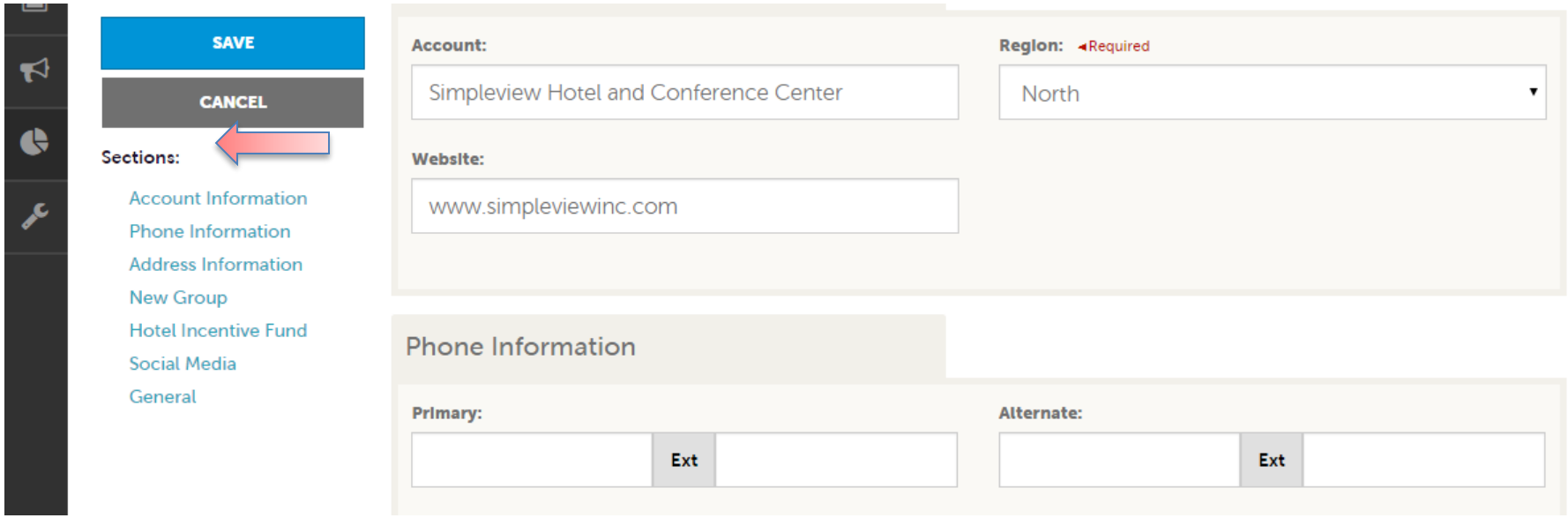
Note: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.

Manage Profile - Accounts



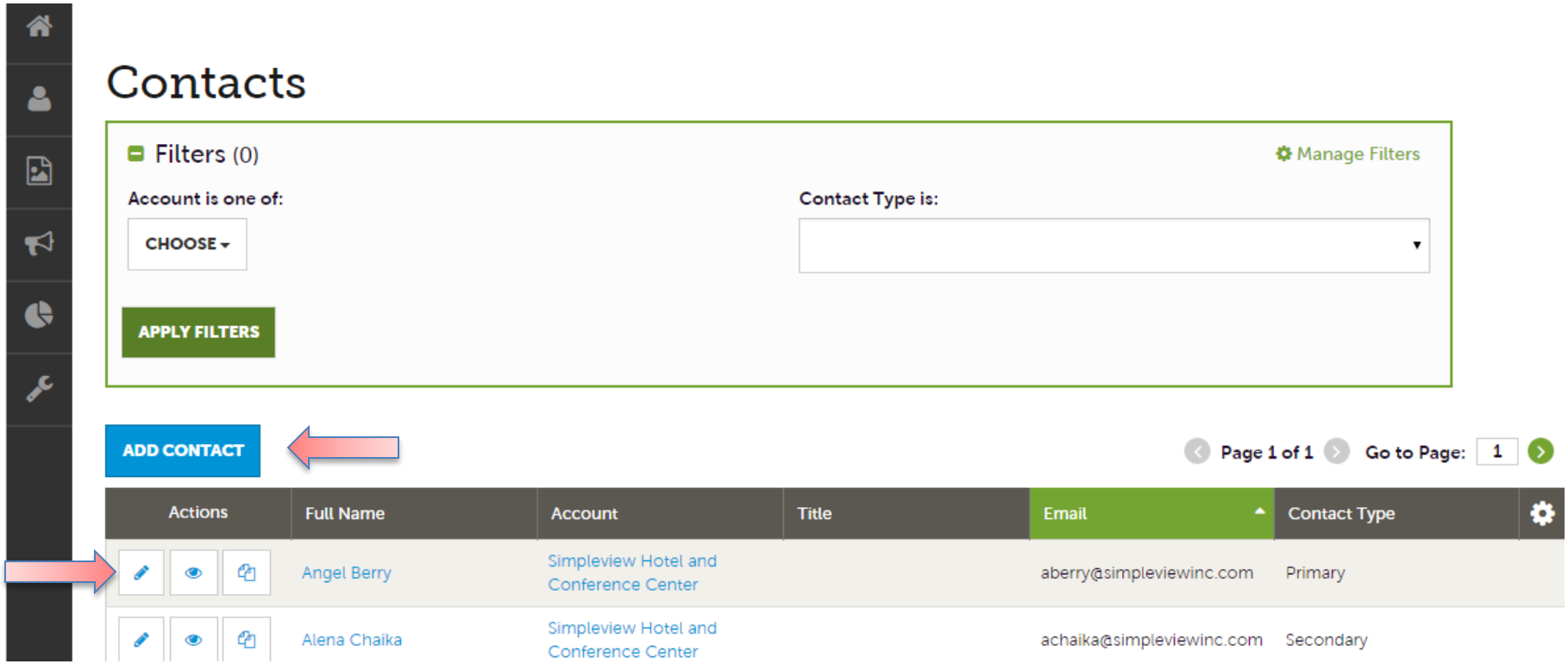
After you click the Profile icon and then Accounts, you will be presented with your account name and various action you can perform. If you see multiple account names, this is due to your property being associated with another property. The pencil icon will allow you to edit your property information. 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)



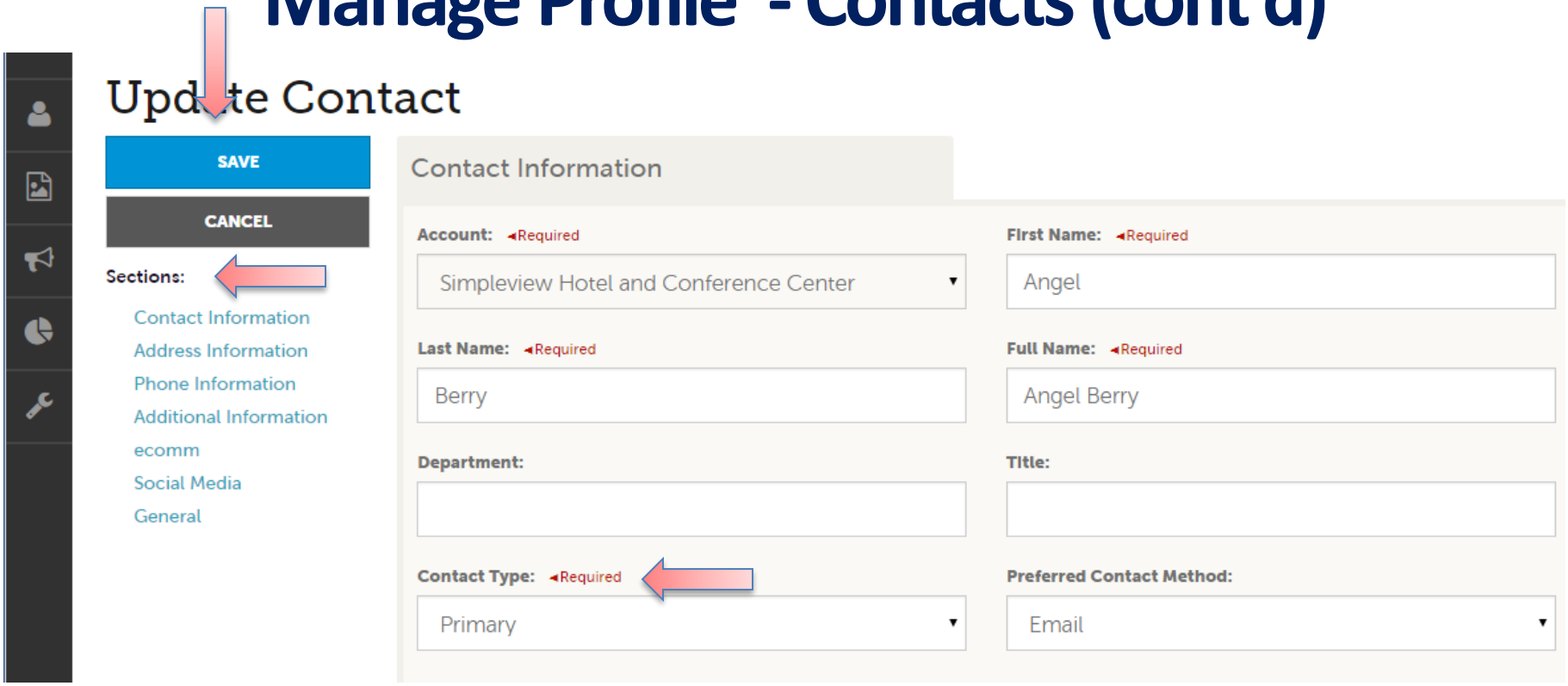
When you view or edit your property information, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing the account, the button in the top left will say Edit. If you are editing the account, the top left button will say Save. You must click the Save button before any of your changes are actually saved!

Manage Profile - Contacts



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.

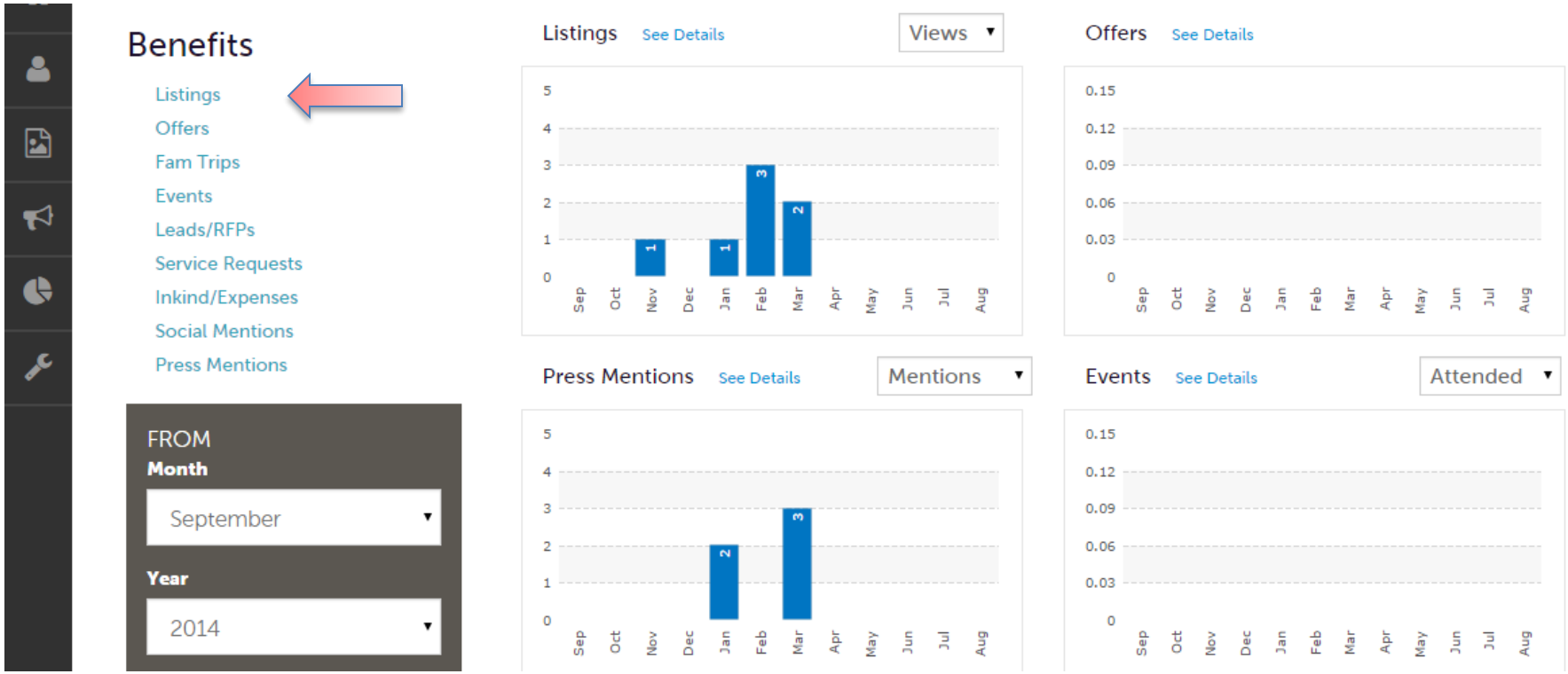
Manage Profile - Contacts (cont'd)



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!

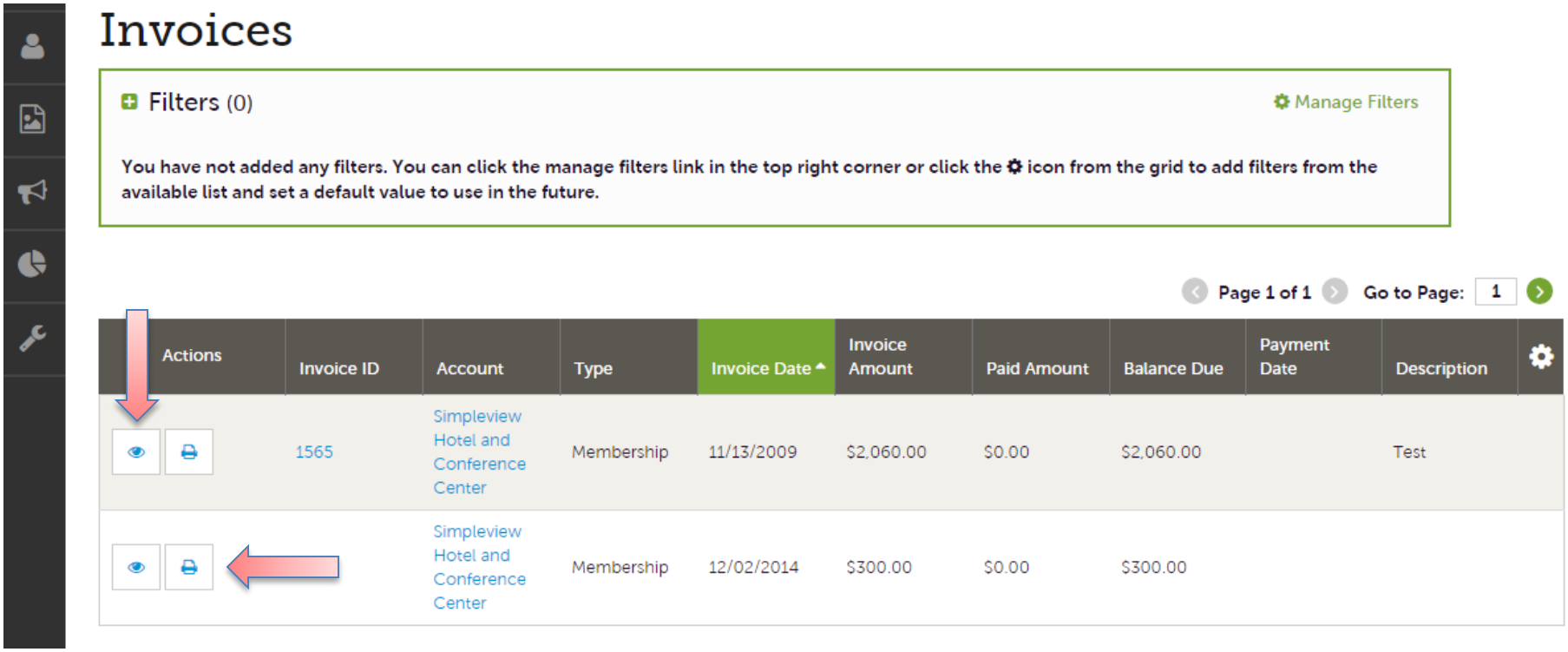
<u>IMPORTANT NOTE</u>: If a contact has left your property it is your responsibility to notify the bureau and/or change their contact type to "Inactive".

Manage Profile - My Benefits



After you click the Profile icon and then My Benefits, you will be presented summary reports based 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



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	

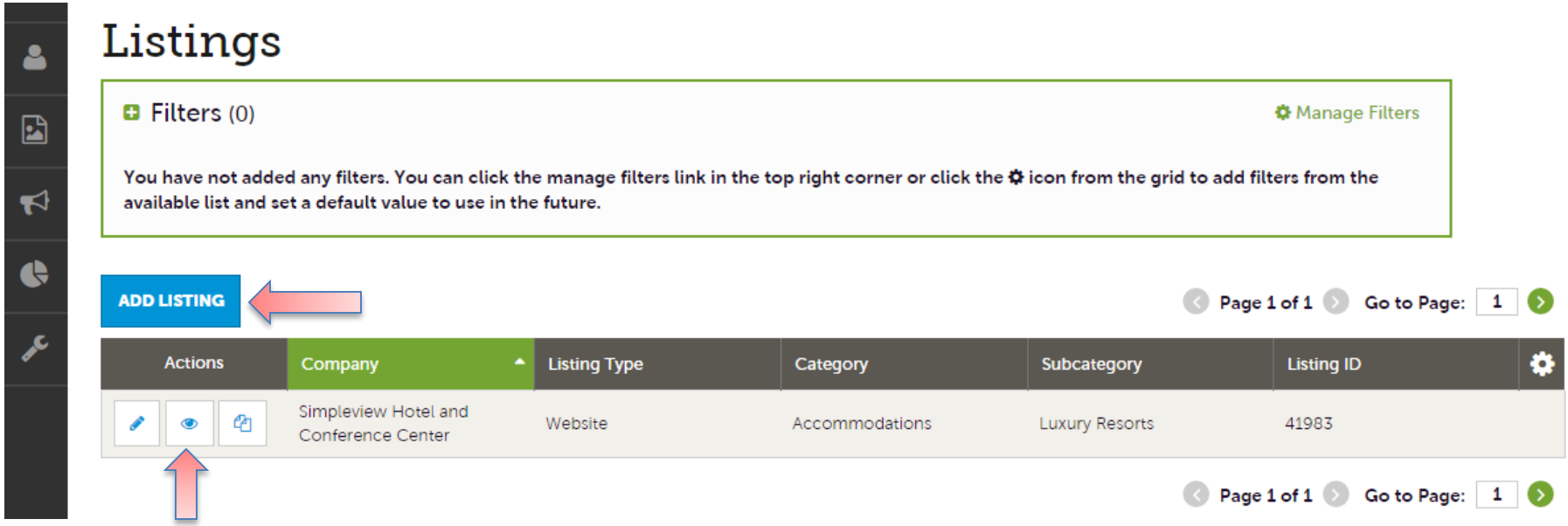
Payment Details

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.

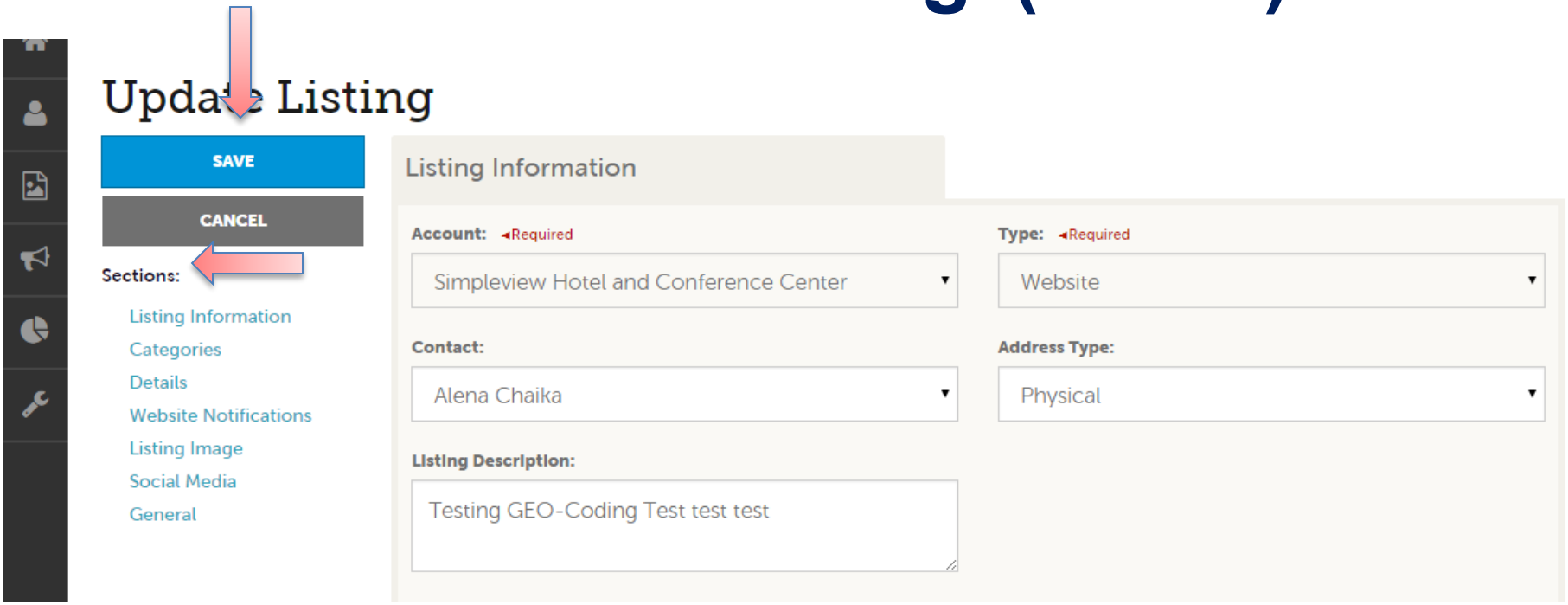
NOTE: Pay Now will only appear if this feature has been enabled by the bureau.

Collateral - Listings



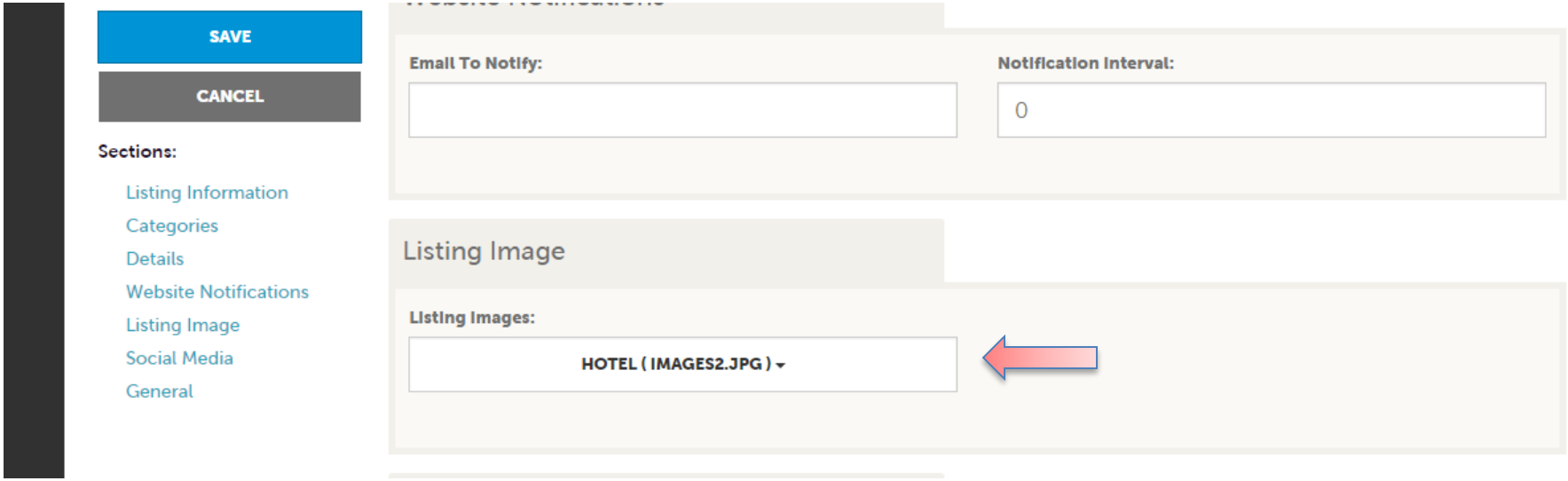
After you click the Collateral icon and then Listings, you will be presented with your property's listings. These listings may be website listings or publication guide listings. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information. 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)



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.

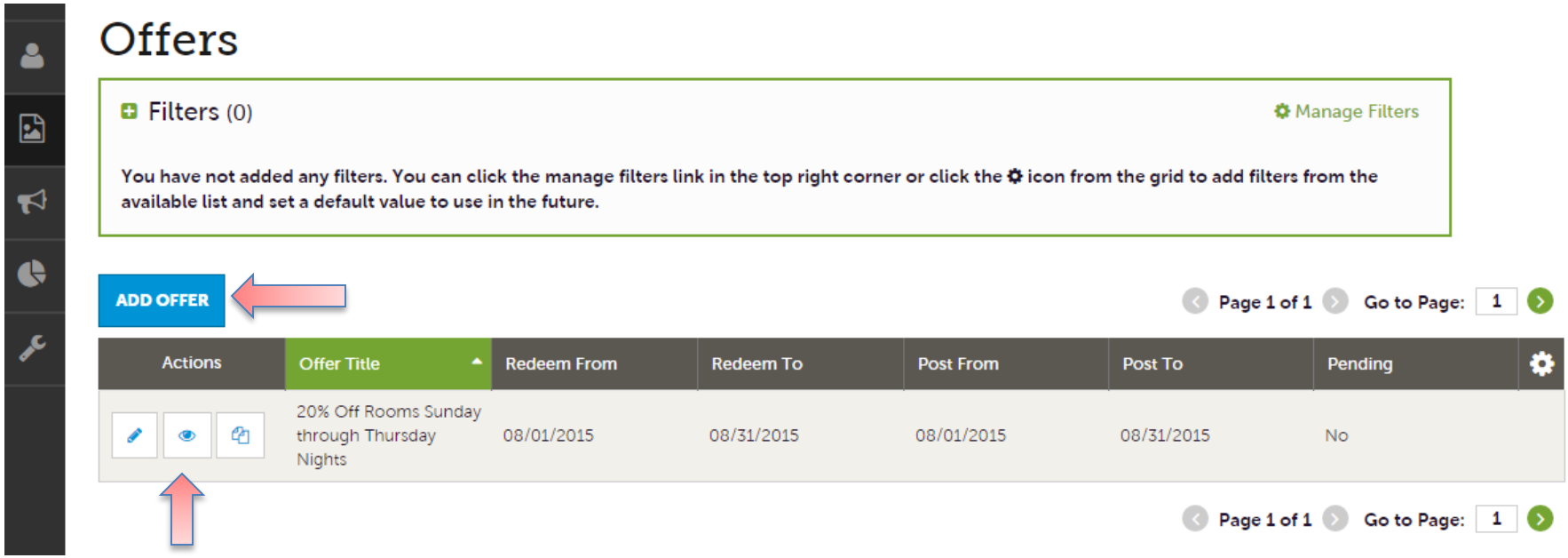
Collateral - Listings(cont'd)



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.

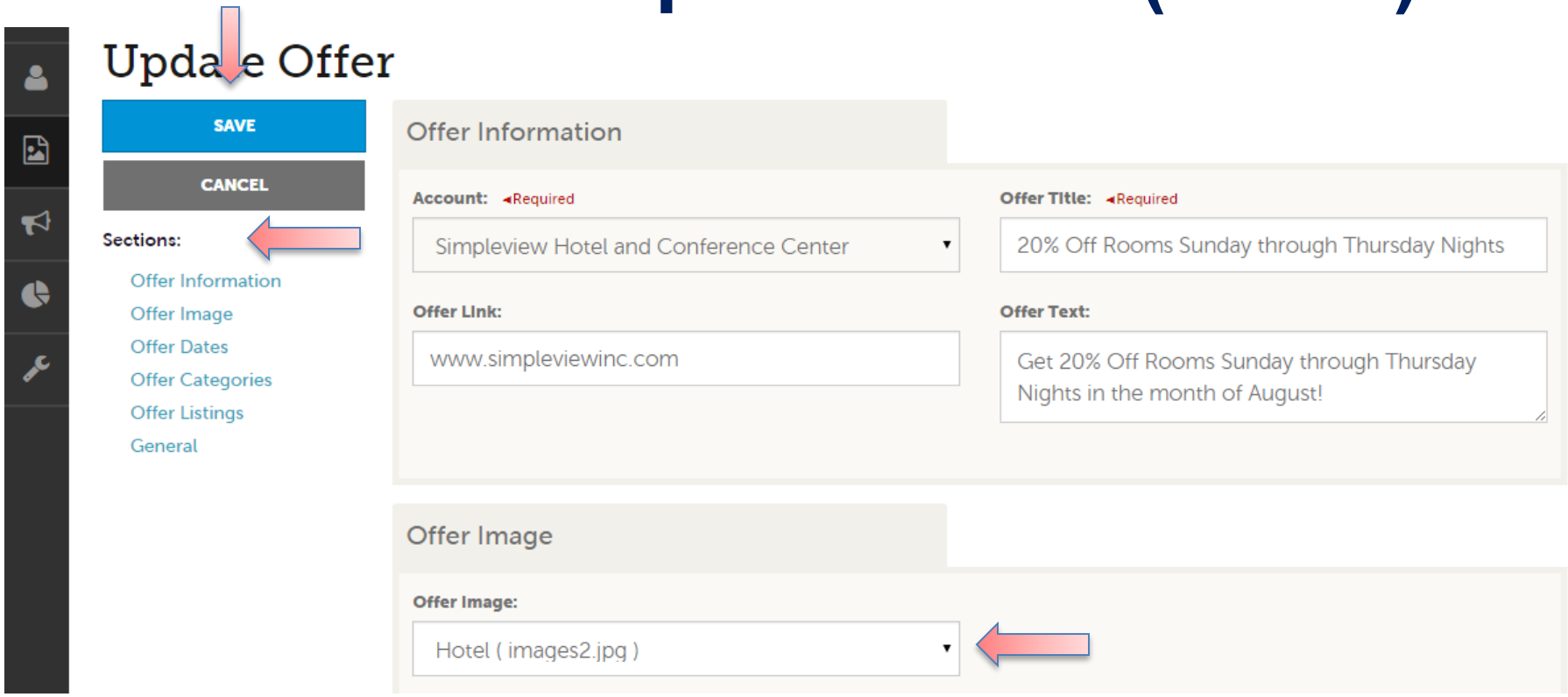
<u>NOTE</u>: Not all listing types allow for images to be added.

Collateral – Special Offers



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.

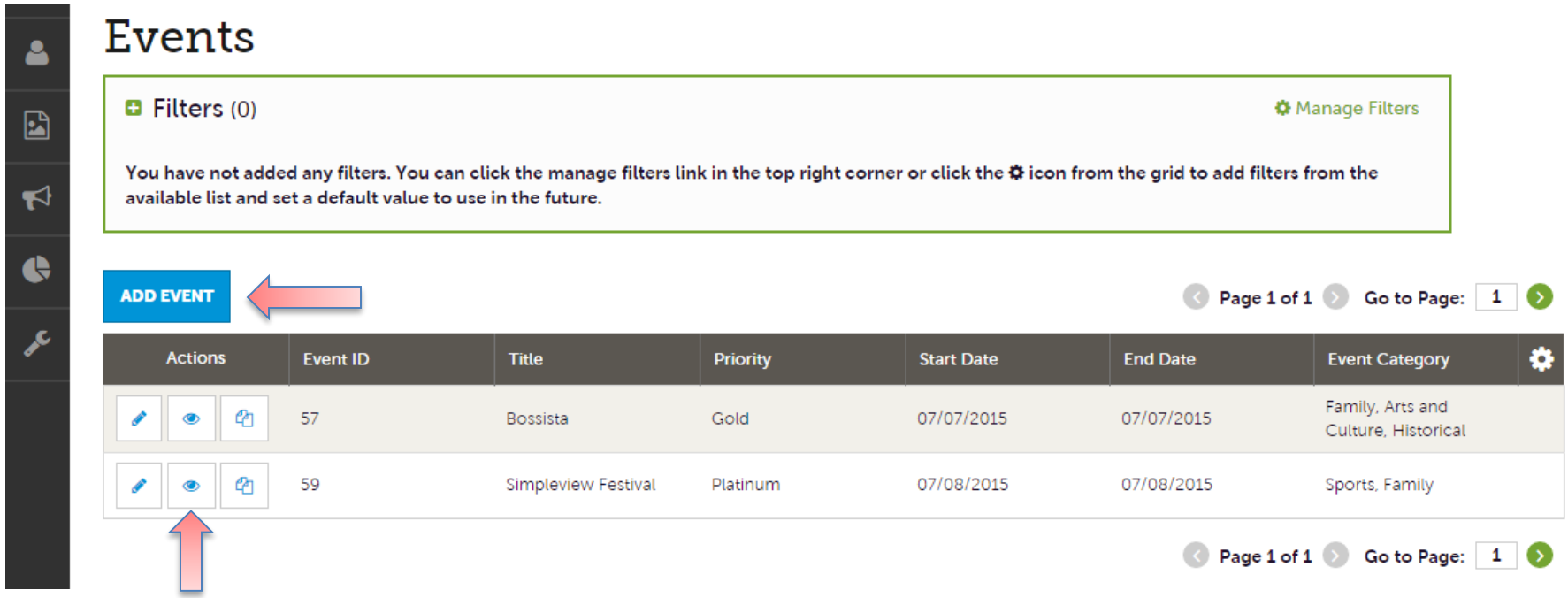
Collateral – Special Offers (cont'd)



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.

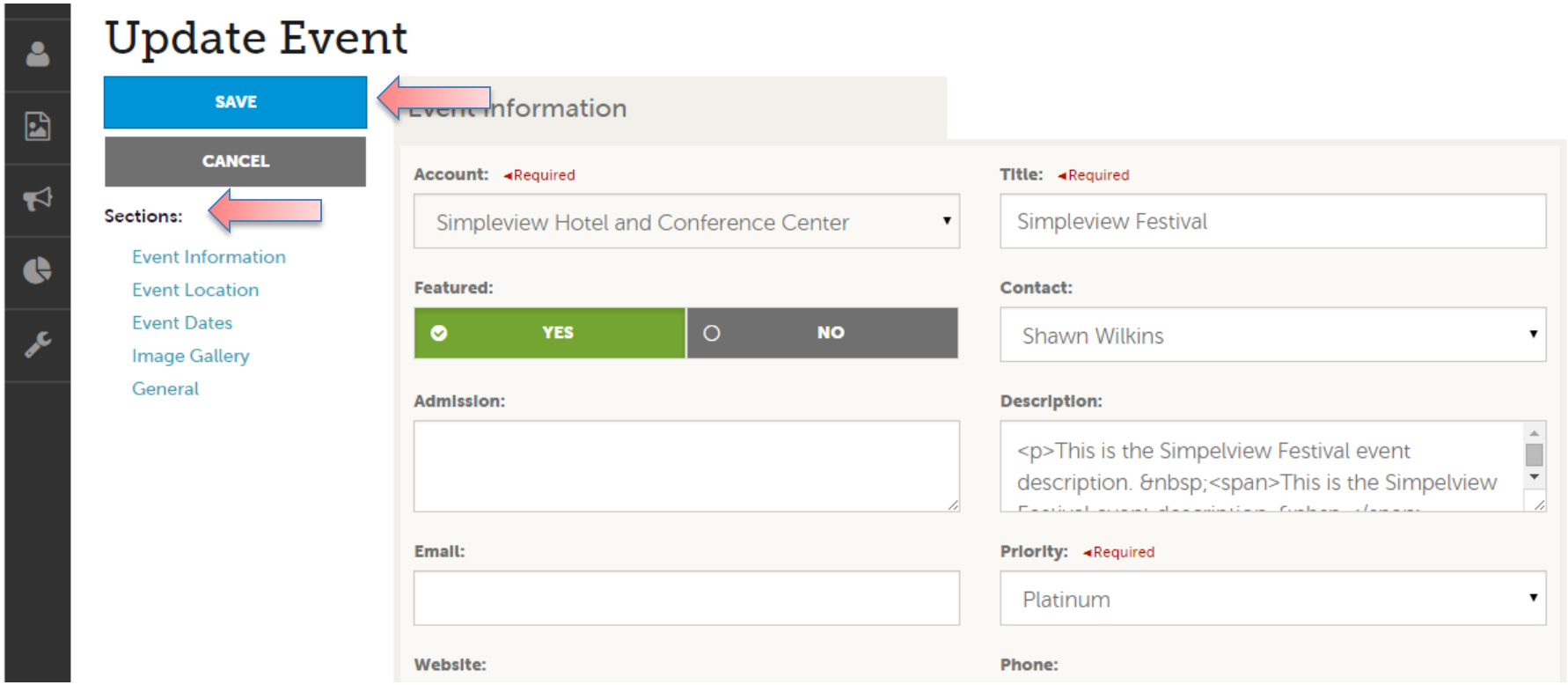
IMPORTANT NOTE: Any edits or adding of offers will require approval from the bureau. Upon saving your updates, the bureau will be notified of your changes/adds.

Collateral – Calendar of Events



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.

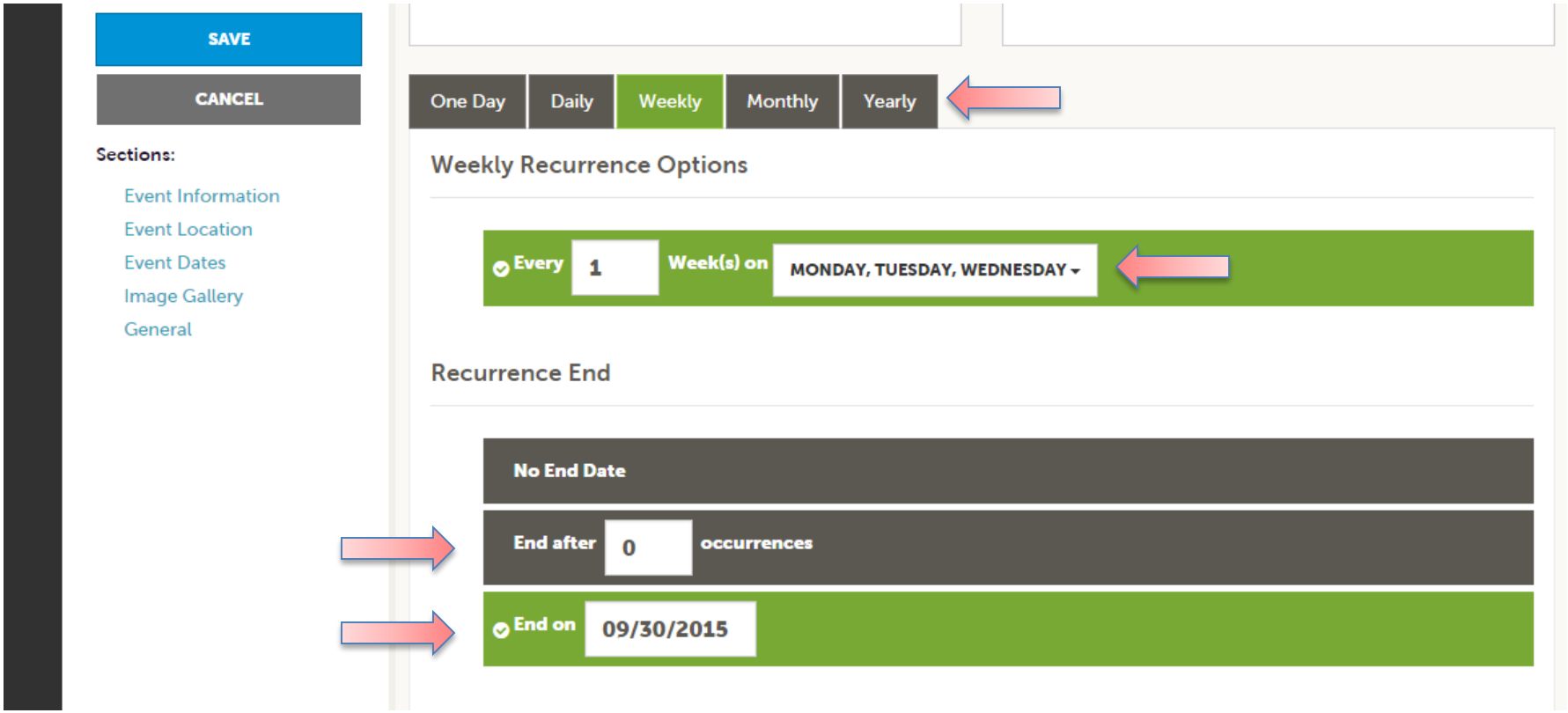
Collateral – Special Calendar of Events (cont'd)



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!

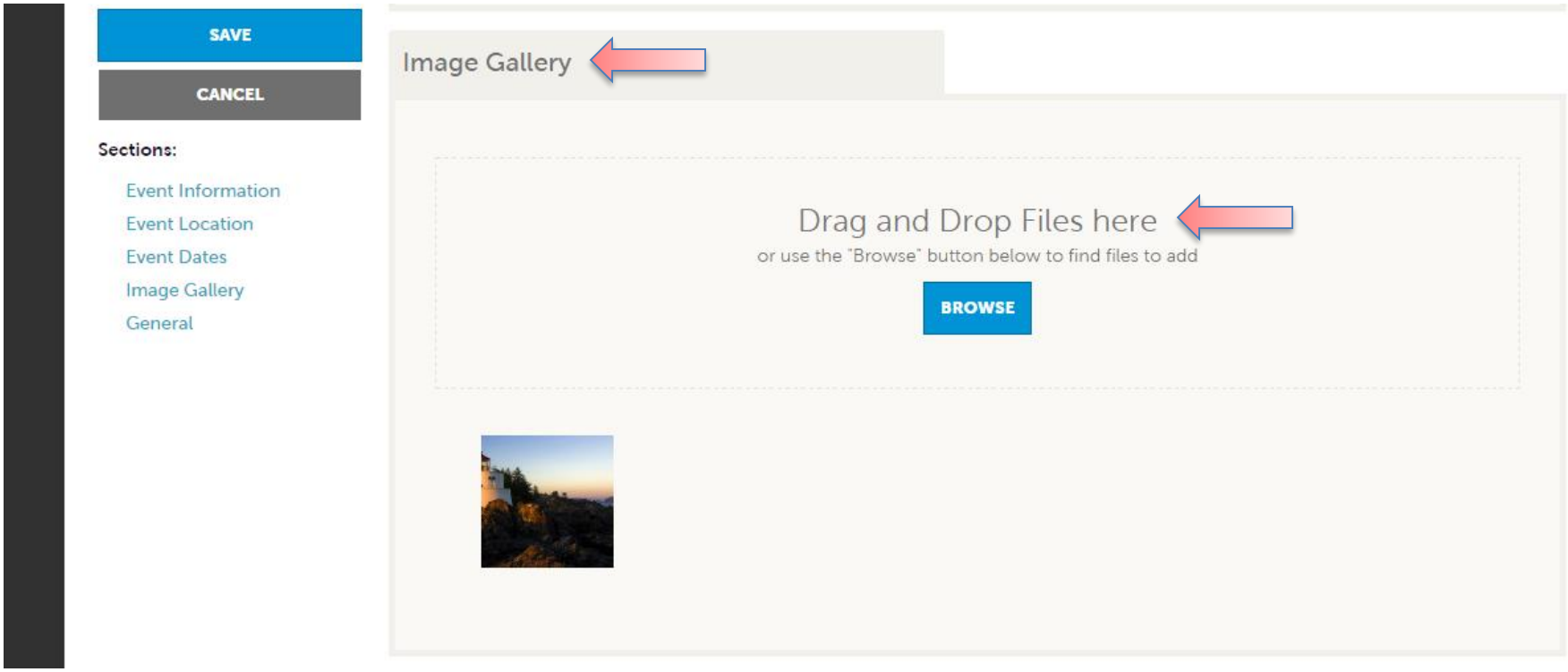
IMPORTANT NOTE: Any edits or adding of events will require approval from the bureau. Upon saving your updates, the bureau will be notified of your changes/adds.

Collateral – Special Calendar of Events (cont'd)



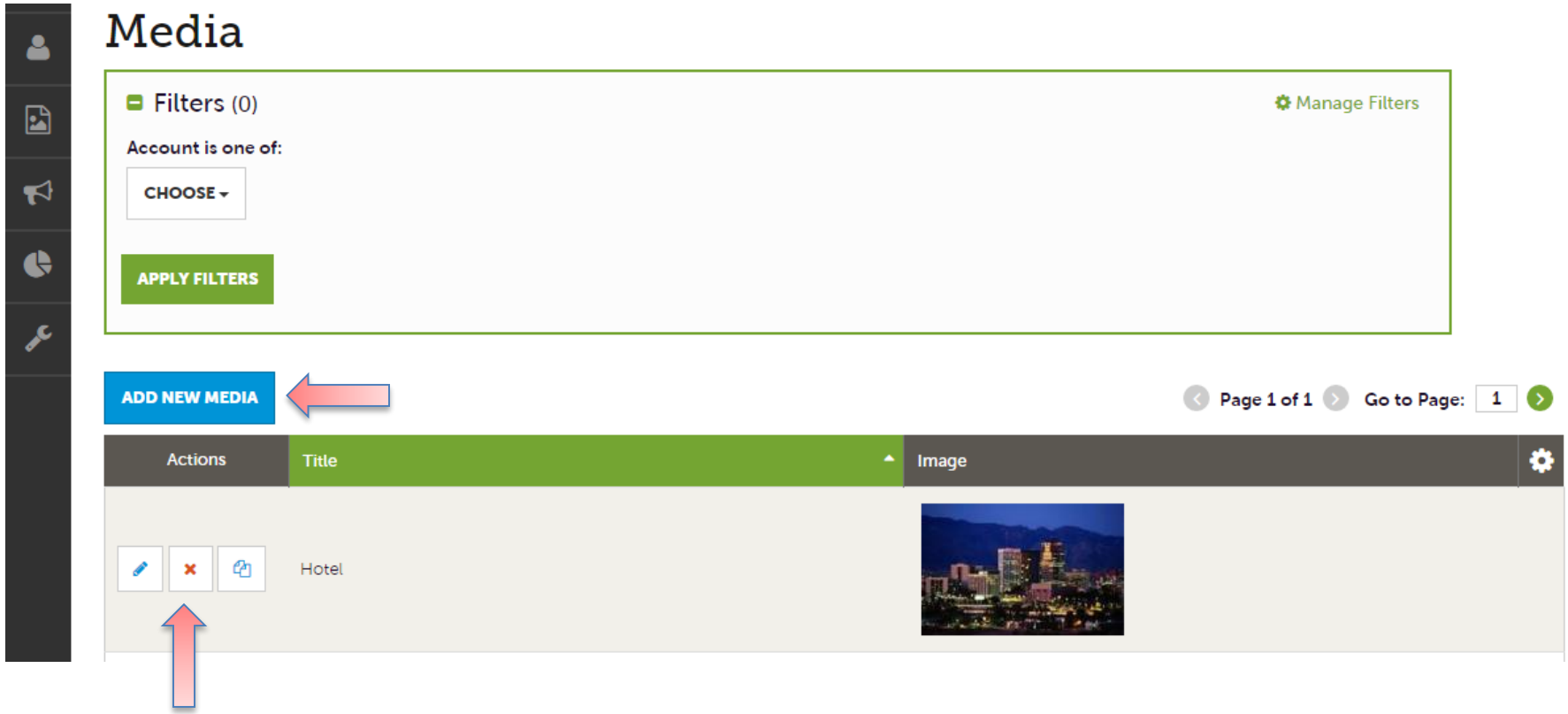
The Calendar of Events has a recurrence model built-in. You can make your event a one time event, daily, weekly, monthly, or yearly. If it is not a one day event, you can choose your recurring days of the event. Depending upon if it is daily, weekly, monthly, or yearly, your recurrence may change. At 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)



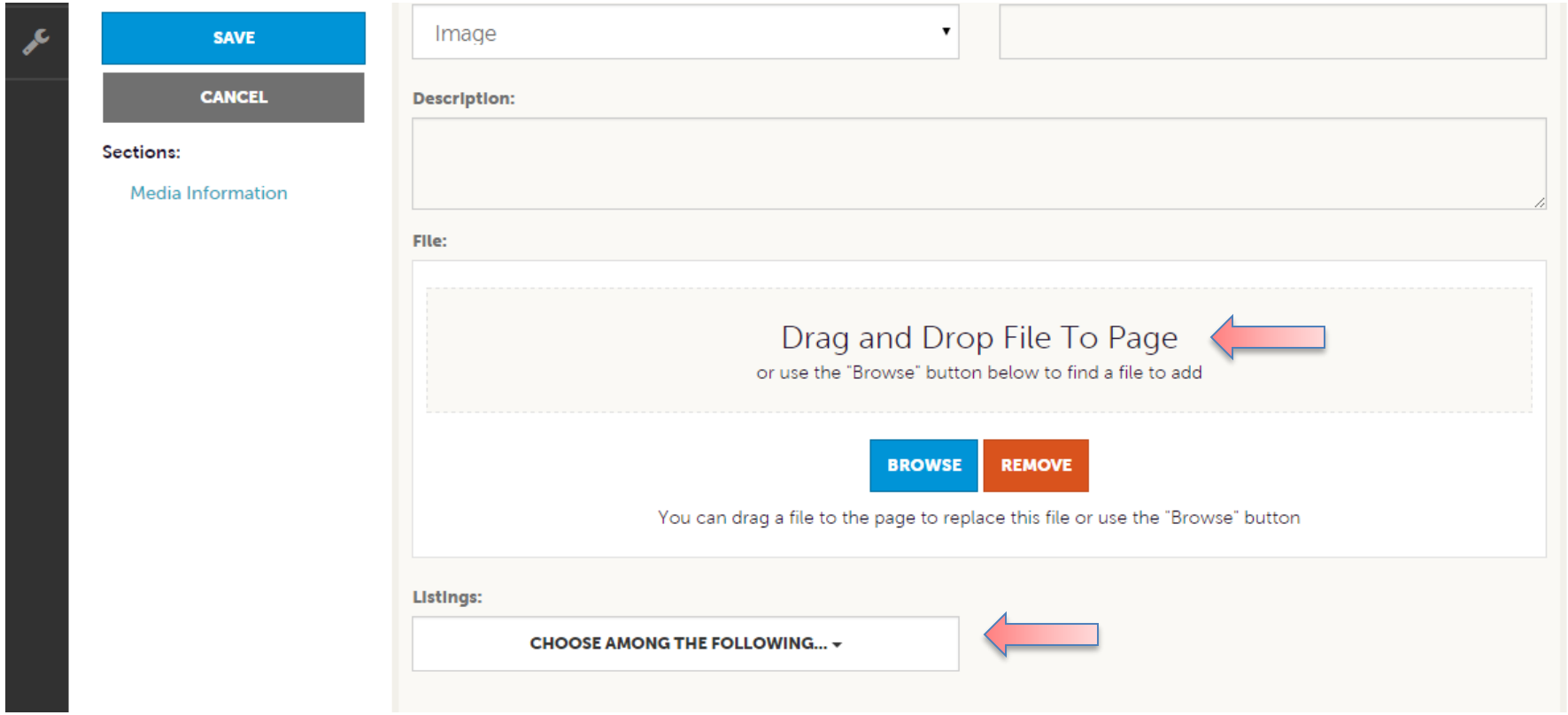
As with Listings and Special Offers you can add images to your event. Adding images to an event is a little different though. In the image Gallery section on the event, you can drag and drop and image or click the Browse button to search your computer for an image.

Collateral – Media



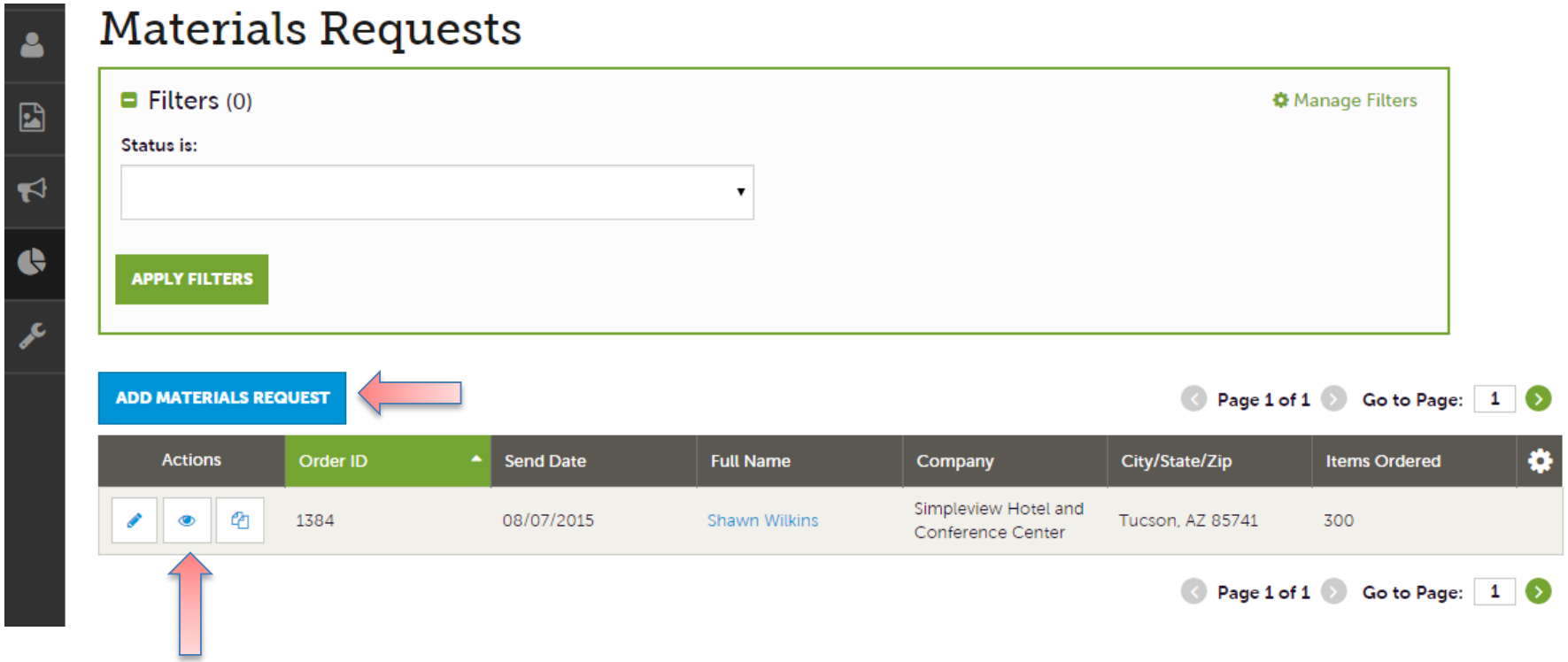
After you click the Collateral icon and then Media, you will be presented with your property's images to possibly be used in listings and special offers. The pencil icon will allow you to edit an existing image. By clicking the red x icon, you can delete an existing image. The clone icon will allow you to duplicate an image. You can also create a new event by clicking the Add Event button.

Collateral – Media (cont'd)



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 – Materials Request



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	0	1
	Cowboy Hat	$80.00	0	5
	Hoodie Sweatshirt	$35.00	0	127
	Pens	$2.00	0	12067
	Restaurant Week Tote Bags	$0.00	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.

Filters and Data Grids

Before we start looking at the extranet, let take some time to discuss setting that can you customize for your own unique experience in the extranet. Below is a list of a few things you have control to change for you that other colleagues may have different settings. More one the setting on subsequence slides.

1. **Filters** – On many pages of the extranet, you will see a Filters section. This is section allows you to narrow down the results you may see on the page. You can update your default filters by clicking the Manage Filters option in the top right corner of this section.

2. **Data Grids** - When viewing pages with filter options, just below the filters is a data grid. A data grid displays a list of records matching the criteria you specified in the filters. You can update your default column heading in data grids by clicking the Sprocket icon in the top right corner of the data grid.

3. **Update your Filters and Data Grids** – As just mentioned, you can customize your filters and data grids. When doing so you will have the ability to add or remove filters and column headings as well as choose the defaults values and ordering.

Filters and Data Grids

RFPs

Filters (1)

Manage Filters

Responded is:

Response Date:

-All Dates-

Lead Name contains:

Create Date:

-All Dates-

Lead ID contains:

Organization contains:

Group Type is one of:

CHOOSE

Status is one of:

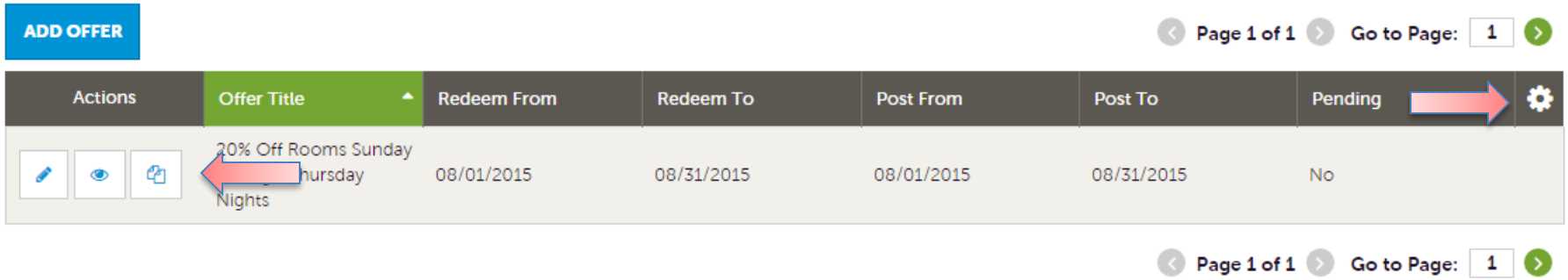
OPEN, OPEN/ BID SENT

APPLY FILTERS

CLEAR FILTERS

Here is an example of the RFPs filter page. Once you have entered your filters click the Apply Filters button to see your results. To customize this page, click the Manage Filters option in the top right corner. Once you have entered filters updated

Filters and Data Grids (cont'd)

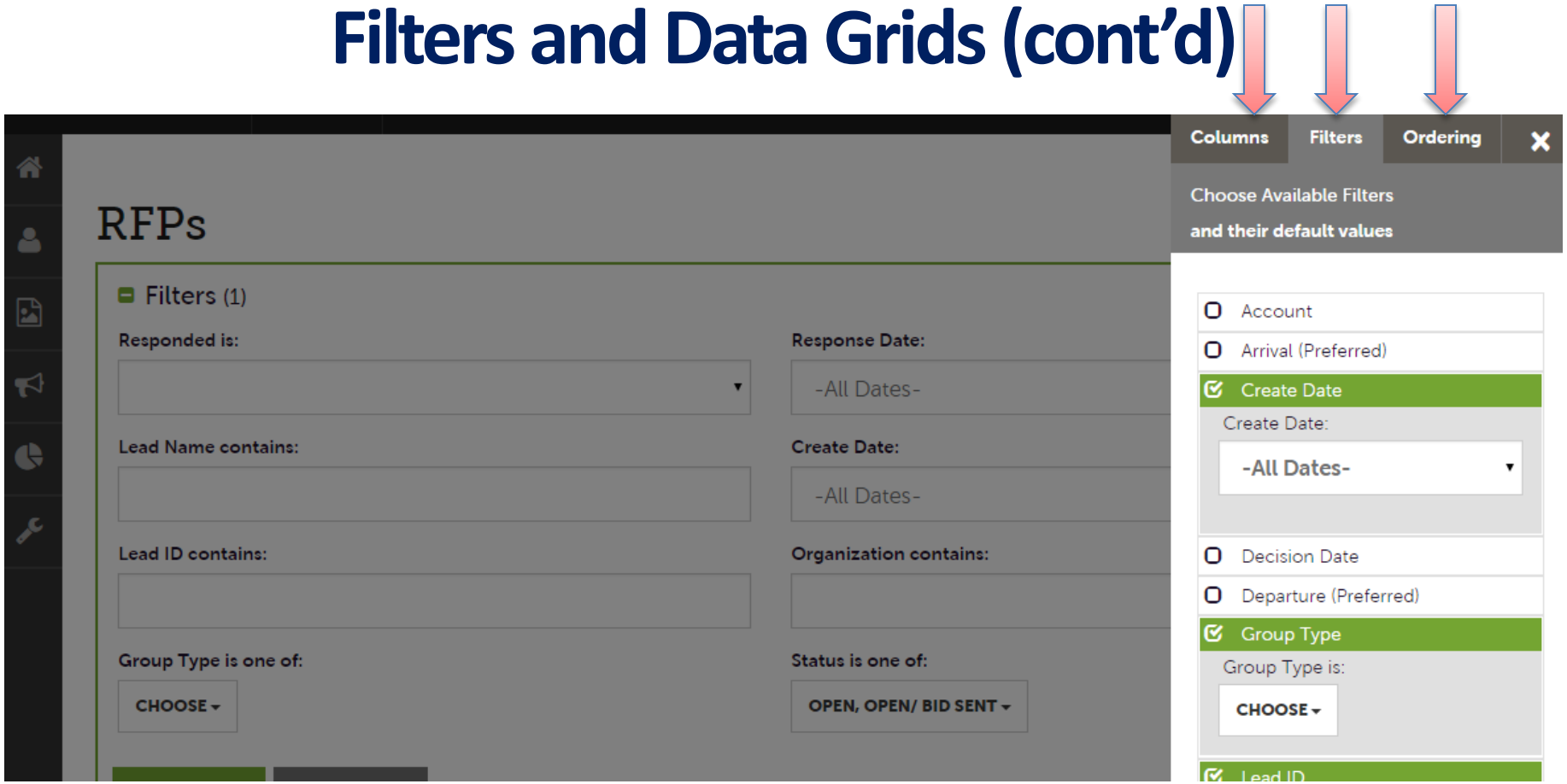


Once have applied your filters, the data grid will update with the matching results. Within each data grid you may see several icons to the left of each record depending upon the page you are viewing. These icons are…

1. **Pencil** – this allows you to edit the record
2. **Eyeball** – this allows you to view the record
3. **Clone** – this allows you to duplicate the record
4. **Add Button** - Depending on the page, you may see an Add button to the top left of the data grid. When this option is available, click the button to add a new record.

- Notice the Sprocket icon in the top right corner, this is to customize your data grids as explained on the next page

Filters and Data Grids (cont'd)



As mentioned above, you can customize your filters and data grids as you prefer. When clicking on the mentioned settings options, you will be presented with a menu on the right. Here is where you can personalize your filters, data grid columns, and ordering. By changing these options, you are only changing them for yourself. A fellow colleague may have different settings.