

PIXL 2.0

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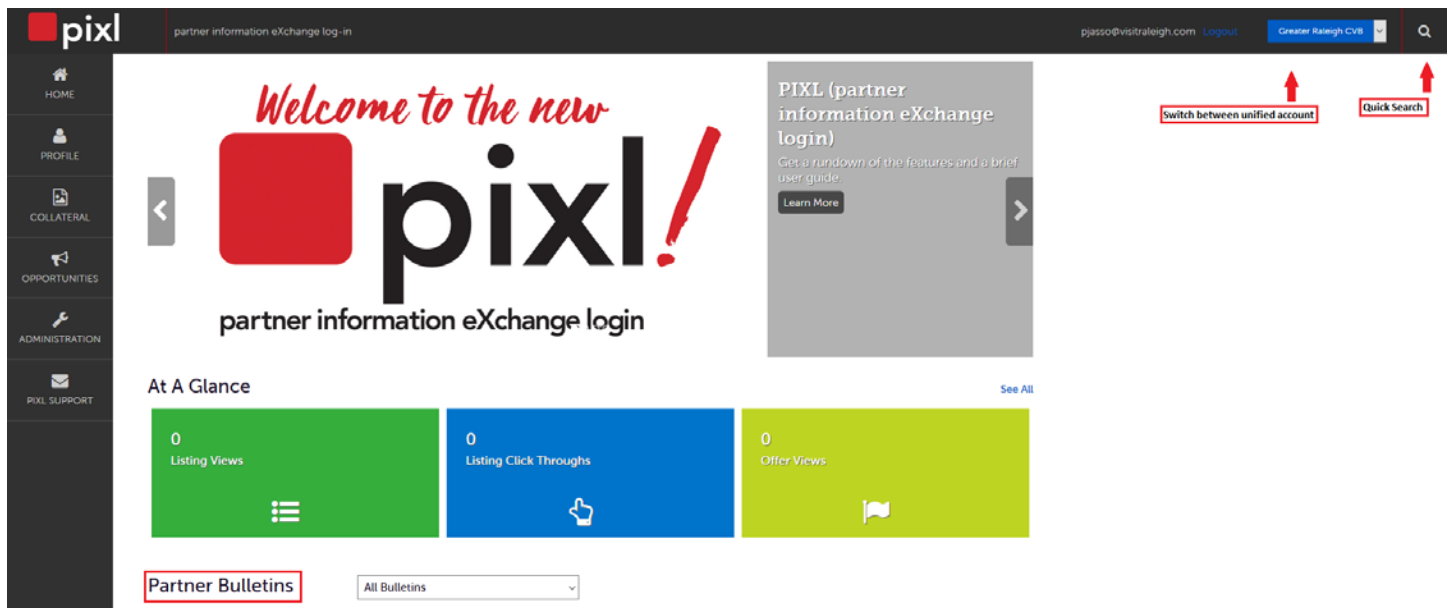
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Homepage

The PIXL homepage is the first screen a user will see after entering their login credentials. The features that display on this screen will be determined by the fields under user's security tab in CRM.

The homepage contains the following tools by default.

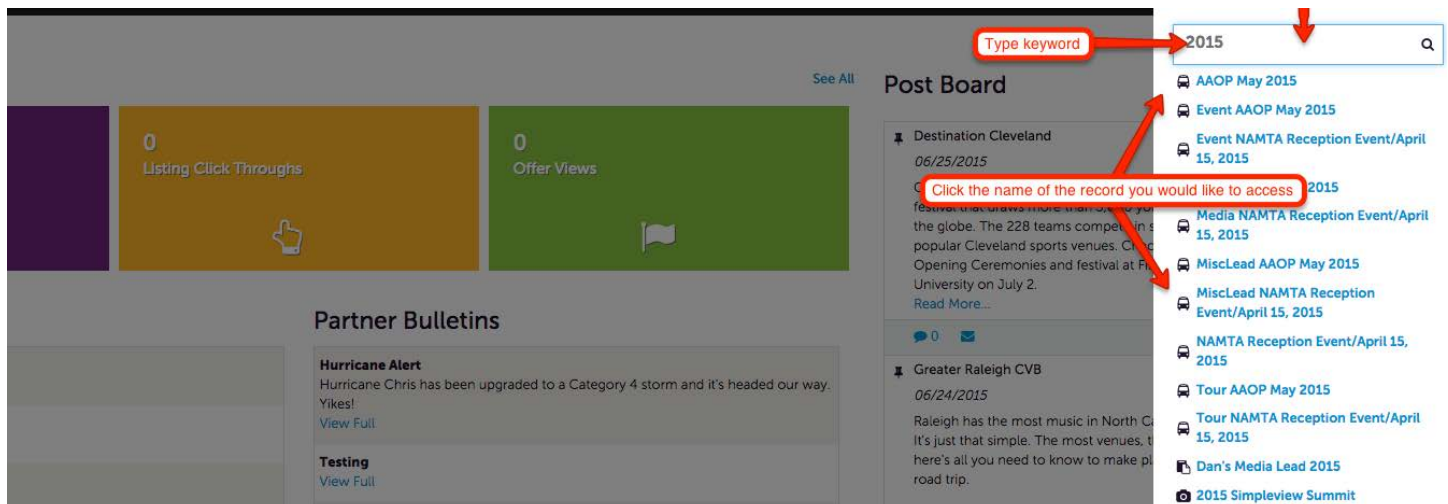
- **Site Search:** Search the extranet for a specific listing, lead, service request or contact
- **At A Glance:** An overview of key metrics from the member/partners benefits summary
- **Partner Bulletins:** A bulletin board that is controlled by the DMO



Quick Search:

The site search defaults to show the user's most recently viewed items, but can also be used to search for a specific record by keyword.

- The icons represent the different page types
- Results pull the most recently viewed records by default
- Type in the search box to search for a record by keyword



At A Glance:

The section will display key metrics relating to the work the business does with the DMO.

At A Glance



Benefits (Also found under Profile → My Benefits):

Extranet	New Simpleview Extranet 4.0 Member/Partner Application
----------	--

Benefits

Overview

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

PRINT

Account Filter reports by account/date range

-All-

Month

August

Year

2015

TO Month

July

Year

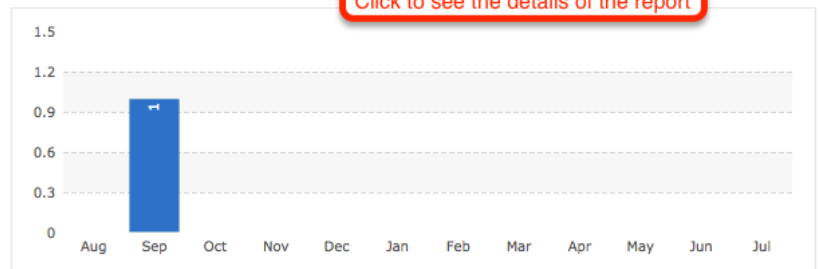
Listings [See Details](#)

Views ▾



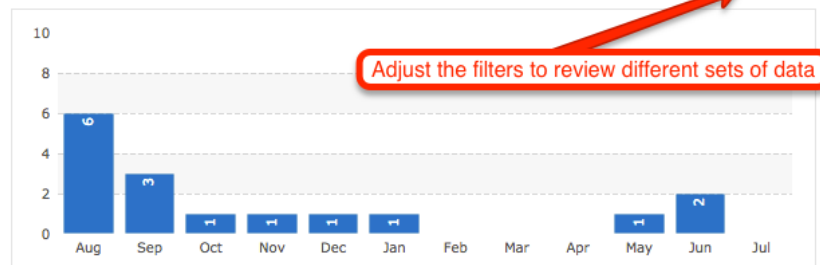
Press Mentions [See Details](#)

Mentions ▾



Leads/RFPs [See Details](#)

Sent ▾



Partner Bulletins:

Partner Bulletins are posted by the System Administrator at the DMO through the admin area. For more information on posting bulletins please refer to the document titled, "Admin - Partner Bulletins".

Partner Bulletins

Show: All Bulletins

Training Docs

Are you new to the partner extranet or just need a refresher?

[View Full](#)

Testing

[View Full](#)

Display First

Should Display first

[View Full](#)

June Monthly Report

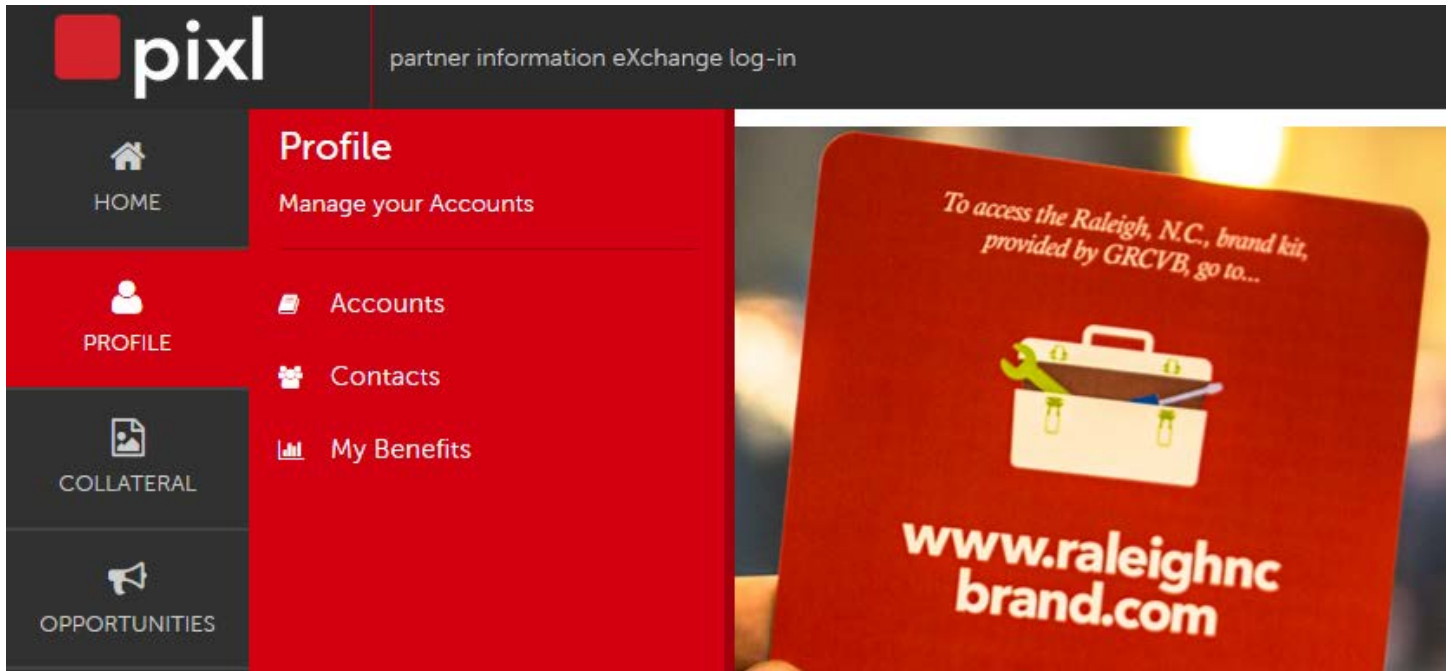
[View Full](#)

Filter list by category

Profile

The Profile section has the following features:

- **Accounts**
- **Contacts**
- **My Benefits**



Accounts:

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

- Property Information
- Phone Numbers
- Address Information
- Social Media

Account Details

Extranet New Simpleview Extranet 4.0 Member/Partner Application

Account Details

EDIT **RETURN**

Sections:

- Account Information
- Phone Information
- Account UDF Group
- Image Gallery
- Address Information
- Invoices
- Social Media
- General

Account Information

Account ID	2
Status	Active
Account	Simpleview, Inc
Extranet Parent	
Region	Downtown
Email	cfeerick@simpleviewinc.com
Website	http://go.com

Phone Information

Primary	(123) 456-7891
Alternate	(520) 284-1080
Toll Free	1800simpleviewinc
Fax	(800) 555-1010

Related Details:

- [Manage Amenities](#)
- [Manage Meeting Space](#)

Click to edit account details

Click to jump to a section on the form

Update Account

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

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

Update Amenities

Update amenity/policy information from the Account grid in section under Profile.

Extranet

New Simpleview Extranet 4.0 Member/Partner Application

Accounts

Filters (0)

Manage Filters

Status is one of:

CHOOSE

APPLY FILTERS

Actions	Account
<div><div></div><div></div><div></div></div>	<div>AngelBerryHotel</div> <div>Manage Amenities</div> <div>Manage Meeting Space</div>
<div><div></div><div></div><div></div></div>	<div>BSC Properties1</div>

Extranet

New Simpleview Extranet 4.0 Member/Partner Application

Update Amenities

Don't forget to save!

SAVE

CANCEL

Accommodations

Accommodations

Dinner - Restaurant:

Contacts:

Contacts

The screenshot shows the 'Contacts' management interface. At the top, there is a 'Filters (0)' section with a search bar labeled 'Search For Contact By Name' and an 'APPLY FILTERS' button. Below this is an 'ADD CONTACT' button. The main area is a table with columns: Actions, Full Name, Account, Title, Email, Contact Type, and Department. The table contains two rows of contact data. Annotations with red arrows point to the search bar, the 'ADD CONTACT' button, the 'Email' column header, and the 'Actions' column icons.

Actions	Full Name	Account	Title	Email	Contact Type	Department
	Chris Feerick	Simpleview, Inc	Director of Mumbling and Grumbling		Secondary	QA
	1234 567	Simpleview, Inc			Primary	

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

Update Contact

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

- **Contact Information:** First/Last/Full Name, Title, Department, Contact Type, Preferred Method of Contact
- **Address Information:** Physical/Billing/Shipping Addresses
- **Phone Information:** Phone/Fax/Toll-Free/Alternate Phone Numbers
- **Additional Information:** Assistant Name, Assistant Phone, Gender, Children
- **Social Media:** Facebook, Twitter, etc.

Update Contact

The screenshot shows the 'Update Contact' form. On the left is a 'Sections' sidebar with links: Contact Information, Address Information, Phone Information, Additional Information, Special Contact UDF Group, Social Media, and General. The main form area has a 'Contact Information' section with fields for 'Account' (Simpleview, Inc), 'First Name', 'Last Name' (Pickering), and 'Full Name'. Annotations with red arrows point to the 'SAVE' button, the 'Sections' sidebar, and the 'First Name' field.

SAVE

CANCEL

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- Special Contact UDF Group
- Social Media
- General

Contact Information

Account: Required

Simpleview, Inc

First Name:

Last Name:

Pickering

Full Name: Required

My Benefits:

This section will show reports based off the DMOs interactions with the partner. The user will see information specifically related to their account(s).

Benefits

- Overview
- Listings
- Deals
- Partner Events
- Leads
- Press Mentions

PRINT

Account

-All-

Month

Filter by account/date range

April

Year

2017

TO

Month

March

Year

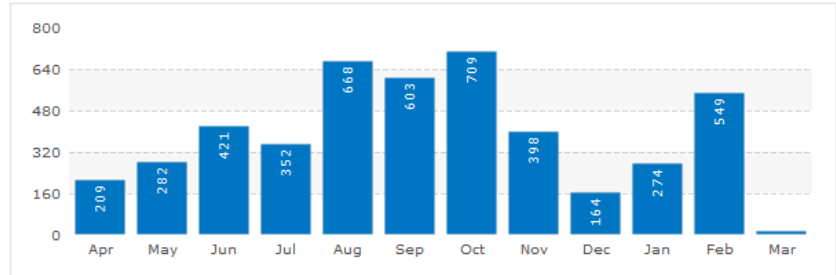
2018

UPDATE

Listings

See Details

Views

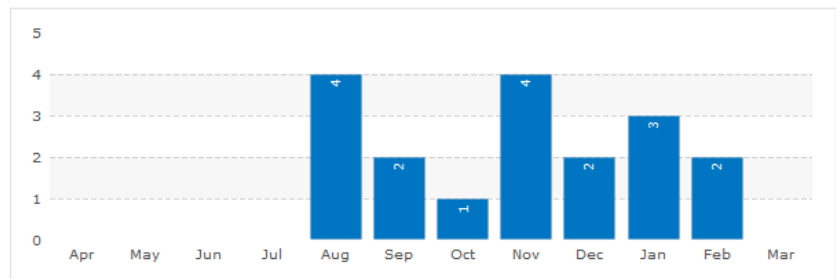


Press Mentions

See Details

Adjust filters to see different sets of data

Mentions



Leads

See Details

Click to see a more detailed view of the results

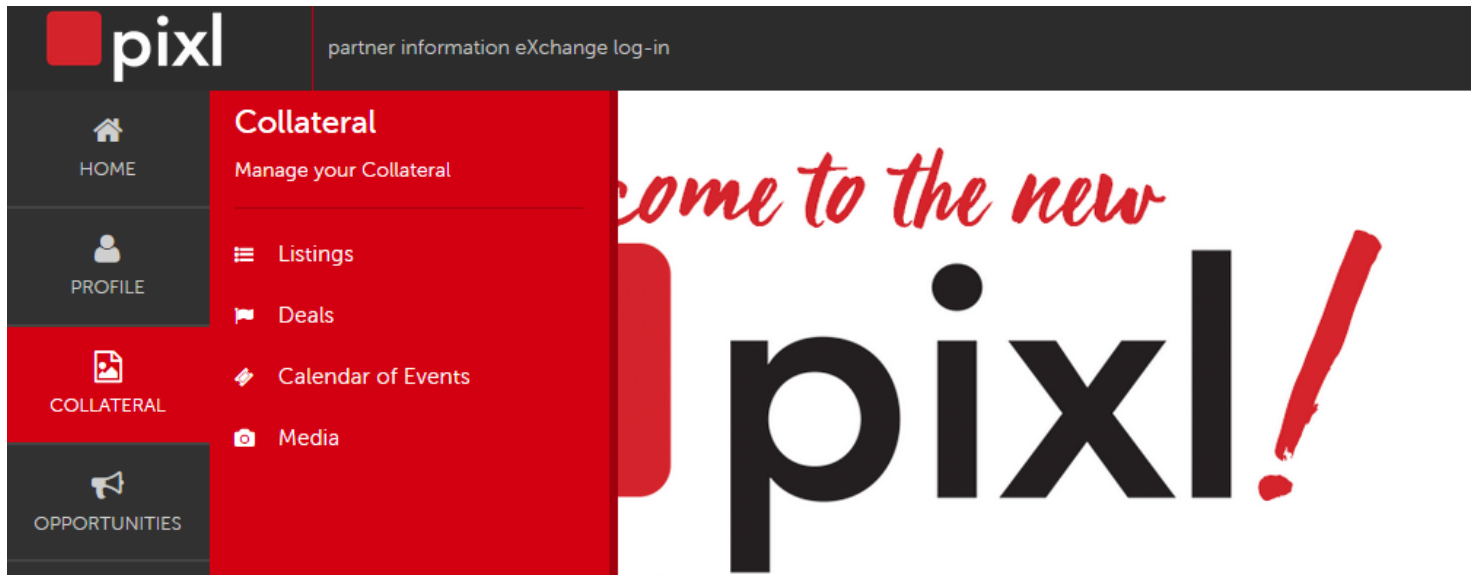
Sent



Collateral

The Collateral section has the following features:

- Listings
- Deals
- Calendar of Events
- Media



Listings:

Listing content can be added or updated through the Listings section. The types of listings that will be made available will be determined by the system administrator at the DMO.

Listings

Filters (1)

Listing Type is one of:

WEBSITE ▾

APPLY FILTERS













CLEAR FILTERS

Manage Filters





Use filters to access a specific listing

Click to add a new listing

ADD LISTING

Actions	Company	Listing Type	Category	SubCategory
  	Simpleview, Inc	Website	Accommodations	Apartments & Condos
  	Simpleview, Inc	Website	Shopping	Apparel
  	Simpleview, Inc	Website	Shopping	Gift & Specialty Shops
  	Simpleview, Inc	Website	Accommodations	Hotels & Resorts

View/Edit/Clone

1. Click "Add Listing" to add a new listing
2. Click "  " to edit a listing
3. Click "  " to view & edit a listing
4. Click "  " to clone a listing
5. "  " will display if the listing is in a "pending" status and cannot be updated until the previous set of changes have been reviewed.

Listing Detail Form

Listing Details

EDIT

CLONE

RETURN

Sections:

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

Click to edit

Click to jump to a section of the form

Listing Information

Listing ID 570

Account Simpleview, Inc

Type Website

Contact Test Person

--Custom Address--

Rank

Listing Description This is line 1, in the first paragraph.

This is line 2, in the second paragraph.

The form is broken down into the following sections:

- Listings Information: Account Name, Listing Type, Contact, Address Type, Rank, Listing Description
- Categories: Category, SubCategory, Additional Subcategories
- Details: Account Name, Address Information, Phone/Fax Numbers, Website URL, Email Address
- Website Notifications: Email To Notify, Interval
- Social Media: Twitter, Facebook, etc.

Update Listing

SAVE

CANCEL

Sections:

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

Don't forget to save!

Jump to a section of the form

Listing Information

Account: ◀ Required

Simpleview, Inc

Type: ◀ Required

Website

Contact:

Deals:

Deals

Filters (1)

Use filters to access a specific special offer

Manage Filters





Offer Category is one of:
5 SELECTED





Post From:
-All Dates-

APPLY FILTERS

CLEAR FILTERS

ADD DEAL Add a new offer

Actions	Offer Title	Redeem From	Redeem To	Post From
  	al Offer	06/30/2016	06/30/2016	06/30/2016
  	Dan's Pre-July Offer	06/30/2016	06/30/2016	06/30/2016

1. Click "ADD DEAL"
2. Click "  " to edit the deal.
3. Click "  " to view & edit a deal
4. Click "  " to clone a deal
5. "  " will display if the special offer is in a "pending" status and cannot be updated until the previous set of changes have been reviewed.

Deal details

- Deal Information: Account Name, deal Title, Deal Link, Deal Text
- Deal Image: Choose an image from the accounts image library. See the Member Profile documentation for details on adding an image to the library.
- Deal Dates: Redeem/Post From/To Dates
- Deal Categories: Deal Categories
- Deal Listing: Link to a specific listing from the deal.

New Deal

Don't forget to save!

SAVE

CANCEL

Sections:

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

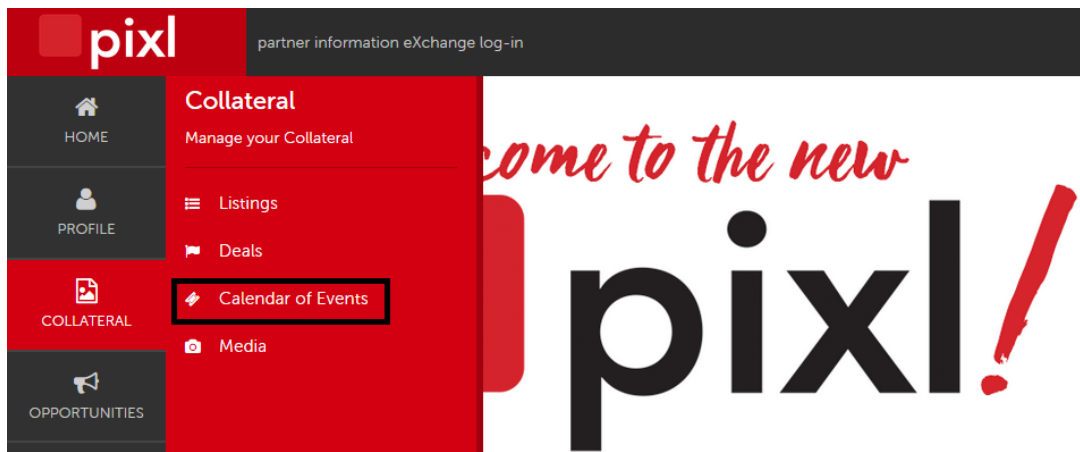
Offer Information

Account: Required
Greater Raleigh CVB






Offer Link:

Jump to a section of the form

Calendar of Events:



Add an Event

1. Click "ADD EVENT" to add a new event
2. Click "  " to edit an event
3. Click "  " to view & edit an event
4. Click "  " to clone an event
5. Click "  " to delete an event
6. "  " will display if the event is in a "pending" status and cannot be updated until the previous set of changes have been reviewed.

Event Details

Events

Filters (1)

Use filters to search for an existing event

Manage Filters

Event Category is one of:
10 SELECTED

Start Date:
-All Dates-

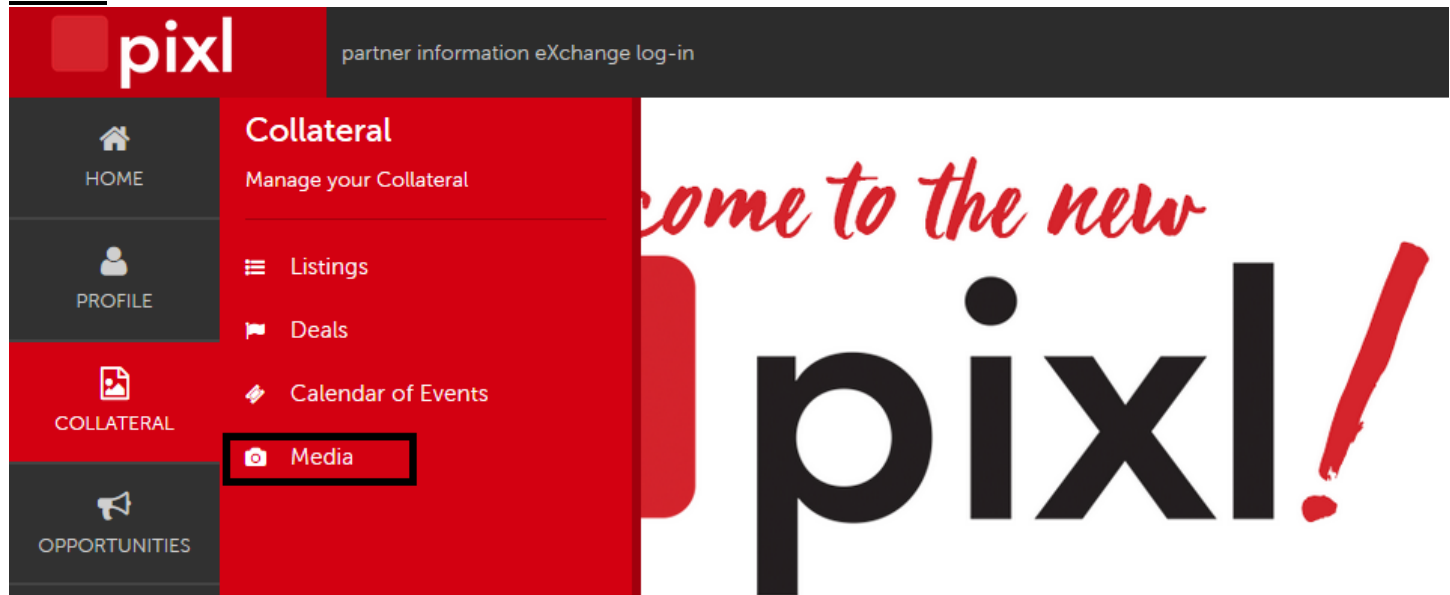
APPLY FILTERS

CLEAR FILTERS





ADD EVENT Click to add a new event				
Actions	Event ID	Title	Priority	Start Date
   	3477	Aaron's Fantastic Party	One-Time Event	03/19/2015
    View/Edit/Clone/Delete		Aaron's Fantastic Party	One-Time Event	03/19/2015

- Event Information: Account, Title, Description, Category, Contact, Email Address, Website URL, Priority, Listing
- Event Location: Venue, Address Information
- Event Dates: Start/End Date, Start/End Time, Recurrence
- Image Gallery: Browse or Drag/Drop Image File

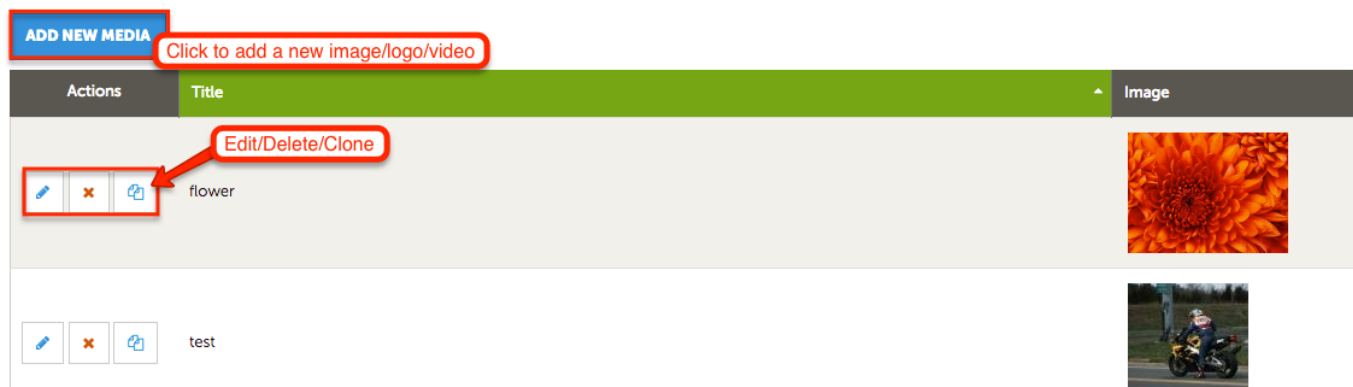
Media:



Add New Media

1. Click "ADD NEW MEDIA" to add a new image/logo or video
2. Click "  " to edit an image/logo or video
3. Click "  " to view & edit an image/logo or video
4. Click "  " to clone an image/logo or video
5. "  " will display if the image/logo or video is in a "pending" status and cannot be updated until the previous set of changes have been reviewed.

Media



Update Media

Media Information: Account, Title, Type (image, logo, video), Sort Order, Description, File, Listing

New Media

SAVE

CANCEL

Sections:
Media Information

Don't forget to save!

Media Information

Account: ◀Required

Simpleview, Inc

Title: ◀Required

Type: ◀Required

--Choose One--

Logo/Image Update Form

Update Media

SAVE

CANCEL

Sections:
Media Information

Media Information

Account: ◀Required

Simpleview, Inc

Title: ◀Required

Type: ◀Required

Logo

Sort Order:

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... ▾

Drag & drop image files or click “browse” to search your computer for a file to upload.

The following media file types can be uploaded via PIXL:

- .png
- .jpg
- .gif

Any other file type will display the following error message:

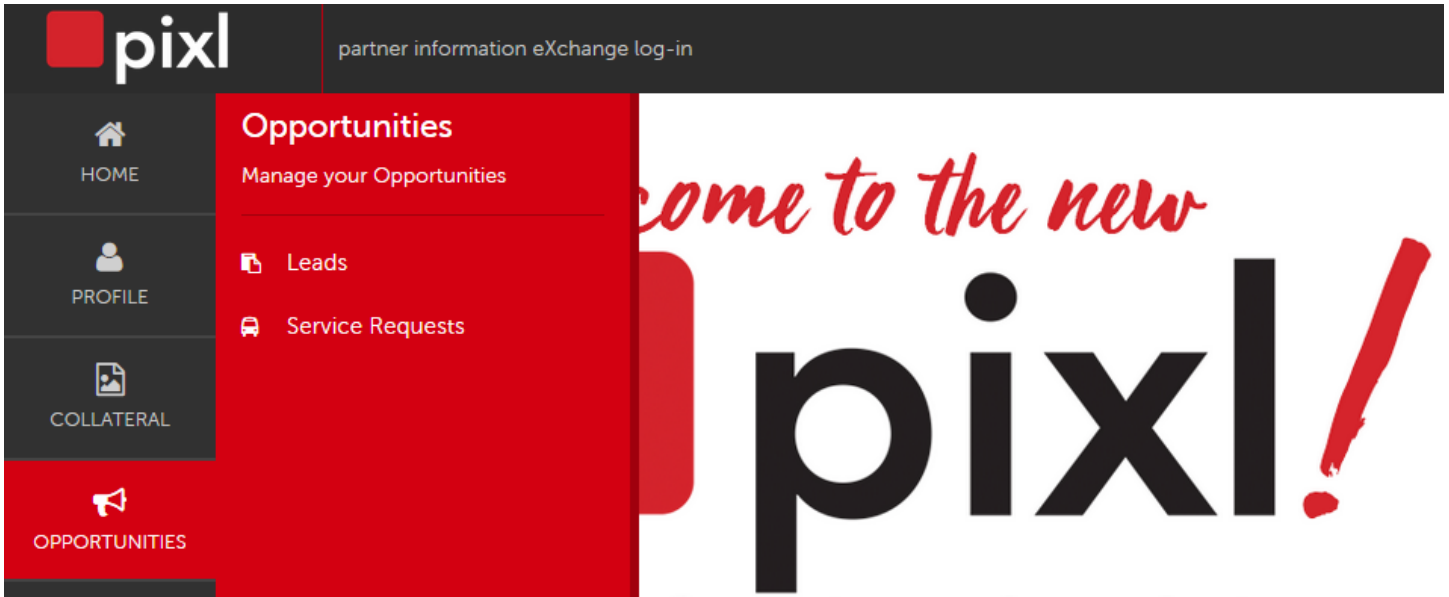
Important Note

The type of file that you are attempting to upload is not compatible with this form.

CLOSE

Opportunities

The opportunities section will display all leads & service requests that have been sent to the member/partner account. The user must have access to Sales or be a Sales Lead Catcher to see leads they were assigned to.



- **Leads:** Leads created in the Meeting Sales, Tour/Travel and Miscellaneous Leads user groups in CRM
- **Service Requests:** Service Requests from Meeting Sales, Tour/Travel, Media/PR & FAMs

Leads:

Leads created in the Meeting Sales user groups in CRM.

Leads

Filters (1)

Use filters to search for a specific lead

Manage Filters

Response Date:

-All Dates-

Lead Name contains:

Status is one of:

OPEN, OPEN/ BID SENT -

Responded is:

APPLY FILTERS

CLEAR FILTERS

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)	
	12131	Another Test Lead	Open	08/06/2015	Meeting		Simpleview	The Simpleview Lodge	08/31/2015	10/27/2015	10/30/2015	
	12111	2026 Annual Meeting and Tradeshow	Open/ Bid Sent	07/07/2015	Meeting	Convention	National Ice Cream & Yogurt Retailers Association	The Simpleview Lodge	10/31/2015	12/18/2016	12/21/2016	
	12000	2026 Annual Meeting and Tradeshow	Open/ Bid Sent	10/21/2014	Meeting	Convention	Simpleview	The Simpleview Lodge	10/23/2015	02/19/2026	02/25/2026	

Page 1 of 1 Go to Page: 1

Lead Status Definitions

1. **Closed / No Bid Sent:** the response due date is prior to today, and the property did not respond
2. **Open:** the lead is tentative, the response due date is either today or in the future, and property has not yet responded
3. **Open / Bid Sent:** the lead is tentative, the response due date is today or in the future, and the hotel responded as Pursuing
4. **Turned Down:** the property has responded as Not Pursuing
5. **Closed / Decision Pending:** the lead is tentative, the response due date is in the past, and the property responded as Pursuing
6. **Closed / Lost to Another City:** the Lead is Lost in CRM
7. **Closed Cancelled:** the Lead is Cancelled in CRM
8. **Closed / Won:** the Lead is Definite in CRM, and the property has been selected
9. **Closed / Won - Properties TBD:** the Lead is Definite in CRM, the property has not been selected, and the TBD Account is selected
10. **Closed Lost:** the property was not selected, and the TBD Account is not selected

Lead Detail

The user can review the details & submit a response to the DMO from the Lead Detail page.

Lead Details

Opportunity ID	4
Opportunity Name	CG Test Lead
Profile	
Organization	Abbey's Restaurant
3rd Party Meeting Planner	Simpleview, Inc
Contact	*Confidential
Meeting Planner Contact	*Confidential
Type	Board Meeting
Source Code	Direct Mail
EEl Type	Default

Review/Reassign a Lead

Simpleview, Inc	
Status	Open
Currently Assigned	Monica Contact (Reassign)

[PRINT RESPONSE LOG](#) [ADD NEW CONTRACT](#)

Click “Reassign” to assign this to a sales contact. This will send a notification to the assigned contact asking them to login to review/respond.

Responses

Responses can be entered and updated on the Responses section of a Lead form.

Responses

Chris Martin Hotel and Suites

Parent Account








StatusOpen/ Bid Sent

Currently AssignedChris Martin (Reassign)

Contracts

PRINT RESPONSE LOG

ADD NEW CONTRACT

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
  	10/05/2017 - 10/10/2017 **Preferred Date**	10/05/2017 - 10/09/2017	Yes	Unfortunately The Chris Martin Hotel and Suites will not be offer a room block for this date range.
  	08/01/2017 - 08/05/2017	08/01/2017 - 08/04/2017	 Yes	The Chris Martin Hotel and Suites has the pleasure of offering our services during the time frame of 08/01/2017 - 08/05/2017. You will find that our in-room dining services are worth the competitive nightly room rates in our bid.
+	12/03/2017 - 12/08/2017	12/03/2017 - 12/07/2017		

The Chris's Hotel

Child Account

StatusOpen

Currently AssignedChris Martin (Reassign)


Contracts

PRINT RESPONSE LOG

ADD NEW CONTRACT

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	10/05/2017 - 10/10/2017 **Preferred Date**	10/05/2017 - 10/09/2017		
+	08/01/2017 - 08/05/2017	08/01/2017 - 08/04/2017		
+	12/03/2017 - 12/08/2017	12/03/2017 - 12/07/2017		

The responses section will display options to review/add responses for each requested set of dates. The user may have the opportunity to respond for the different properties that have been granted access to this opportunity.

- Click to add a new response
- Click  to edit an existing response
- Click to view a previously entered response
- Click to copy a response to another date range

Response Information

Response Information

Pursuing this lead:

☐ NO

☐ YES

Account: Required

Simpleview, Inc

Comments: Required

Bureau-Only Comments:

Rate Range:

From

To

Requested Rooms:

Peak Night Rooms:

- ☐ Pursuing this lead (yes/no): Answer 'yes' if the property would like to pursue the piece of business
- ☐ Account: Will list parent/child accounts. Choose the account the response will be submitted for
- ☐ Comments: Comments in the partner's response that should be relayed to the client
- ☐ Bureau Only Comments: comments from the partner that are intended to be received only by the destination and should not be relayed to the client
- ☐ Rate Range: Indicates the range of room rates included in the property's response. A single rate should be entered in both the low and high rate boxes on the form
- ☐ Peak Night Rooms: The maximum number of rooms for any single night in the room block of this response. This number is auto-populated as the room block data is filled in.

Room Information

Enter the number of available rooms by type for each night of the block.

Room Information

	Mon 07/27/2015	Tue 07/28/2015	Wed 07/29/2015	Thu 07/30/2015	Fri 07/31/2015	Sat 08/01/2015	Sun 08/02/2015
Singles	0	0	0	0	0		
Doubles	0	0	0	0	0		
Multiple	0	0	0	0	0		
Kings	0	0	0	0	0		
Suites	0	0	0	0	0		
Total	0	0	0	0	0		
Requested	10	10	10	10	10		

File Attachments

File Attachments

ATTACH FILE

 or drag files to the page

197CF813-ABAD-44AB-A8914AE5350EAA4F.csv

Click to remove the file

Booked Rooms 30/60/90/120 Days Out

Properties that have been selected for a meeting sales lead can now enter their booked rooms leading up to the event date via the Extranet. This data will be present on the lead's detail section for each selected property and available in the field picker for searches and reporting.

Once a lead has been updated to a "Definite" status, the selected hotel properties will have the ability to enter the number of booked rooms 30, 60, 90 or 120 days out, leading up to an event.

1. An extranet user can find a lead to update by selecting "Closed/Won" from the Lead Grid. Alternatively, they can search by Lead ID or Lead Name under the Keyword Search.

Leads

Filters (1)

Lead Name contains:

Lead ID contains:

Organization contains:

Responded is:

Property Lead Status is one of:

CLOSED/ WON -

APPLY FILTERS CLEAR FILTERS

Page 1 of 1

Actions	Lead ID	Lead Name	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	Assigned Contact
	12303	2016 Simpleview Fall Regional Training	11/16/2016	Meeting		Simpleview	The Simple Starr Hotel		05/12/2017	05/15/2017	

2. Navigate to the Room section on the Lead to enter the 30, 60, 90 or 120 numbers. Please note: the Days out fields will only be available to the properties where the rooms were contracted.

PRINT RETURN

Sections:

- Revision Notes
- Additional Lead Information
- Lead Information
- Meeting Dates
- Group Profile
- Meeting/Exhibit Space
- Room Summary
- History/Futures
- Responses
- Room Data**
- Food & Beverage
- Transportation Requirements
- Meeting Functions
- Notes
- Sales to Services
- Travel

Contract for The Simple Starr Hotel 11/16/2016

PRINT RESPONSE LOG ADD NEW CONTRACT

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
	05/12/2017 - 05/15/2017	05/12/2017 - 05/14/2017		

Room Data

Add/Edit	Property	Update Booked Rooms by Days Out				Total Pickup
		120 Days	90 Days	60 Days	30 Days	
Daysout	The Simple Starr Hotel					15

Food & Beverage

Food and Beverage Requirements

Food and Beverage Budget

3. Enter number of contracted rooms when the event is 30, 60, 90 or 120 days away from contract start date.
4. Click Save

SAVE

CANCEL

Sections:

- Lead Information
- Update Booked Rooms by Days Out

Lead Information

Lead ID

2016 Simpleview Fall Regional Training

Organization

Simpleview

Contact

Chris Martin
875 Mt. Lebanon Boulevard
Pittsburgh PA 15205
UNITED STATES
520-575-1154
cmartin@simpleviewinc.com

3rd Party Meeting Planner

Helms Briscoe - Fairmount, IL (Fraternal)

Meeting Planner Contact

tom Brown
3522 S Sixth Pkwy
Fairmount IL 61841
UNITED STATES

Arrival

05/12/2016

Departure

05/14/2016

Update Booked Rooms by Days Out

120 Days:

90 Days:

60 Days:

30 Days:

PRINT

RETURN

Sections:

- Revision Notes
- Additional Lead Information
- Lead Information
- Meeting Dates
- Group Profile
- Meeting/Exhibit Space
- Room Summary
- History/Futures
- Responses
- Room Data
- Food & Beverage
- Transportation Requirements
- MeetingFunctions
- Notes
- Sales to Services Turnover
- Services
- Attendance Building Programs
- Welcome Programs
- Convention Center
- Post-Convention
- Continental Breakfast
- Signage

Responses

Simpleview Convention & Visitors Bureau

Status

Open

Currently Assigned

None (Assign)

Contracts

PRINT RESPONSE LOG

ADD NEW CONTRACT

Actions	Meeting Dates	Room Request Dates
+	03/16/2017 - 03/17/2017	03/16/2017 - 03/18/2017

Room Data

Room Data is not available for this lead

This message will display on leads where the property logged in was not selected as the winning property.

Food and Beverage Requirements

Food and Beverage Budget

Number of Meal Functions

Entering Pickup Rooms

After the business has actualized, you may want to collect Pickup from your partners. In order to do so, there are a few requirements that must be met.

- The lead must be in a Definite or Assist status type in CRM
- The event/meeting end date must be in the past
- The partner should be set with extranet security settings that will allow them to enter pickup (Sales Lead Catcher and/or Pickup Manager)

During the processing of the lead, you may forget to enter the Pickup dates and/or you may not have included enough shoulder dates, resulting in your partners needing to contact you to update the dates. The Pickup features in Extranet 4.0 will help to address this issue.

Empty Pickup Block Dates

If you forget to add Pickup dates in the lead, the system will automatically present the Pickup block with the same dates as the Contracted Room block within the extranet. This way your partners can enter pickup information even if the Pickup Block dates are not populated in CRM.

Adding Shoulder Dates

If the Pickup dates available on the extranet do not allow the partner to enter rooms for all of the shoulder dates they picked up, they can add the shoulder dates themselves as outlined below.

1. On the Pickup form, click **Add Shoulder Days**

SAVE

CANCEL

Sections:

Lead Information

Room Summary

Pickup Rooms

Room Summary

	Tue 08/09	Wed 08/10	Thu 08/11	Fri 08/12	Sat 08/13	Sun 08/14	Mon 08/15
Rooms	5	25	25	150	200	200	25
% of Peak	2%	12%	12%	75%	100%	100%	12%

	Tue 08/16	Wed 08/17	Thu 08/18	Fri 08/19	Sat 08/20	Sun 08/21	Mon 08/22
Rooms	5	-	-	-	-	-	-
% of Peak	2%	-	-	-	-	-	-

Requested Rooms 635

Peak Requested 200

Additional room requests/needs

Pickup Rooms

Pickup Rooms:

812

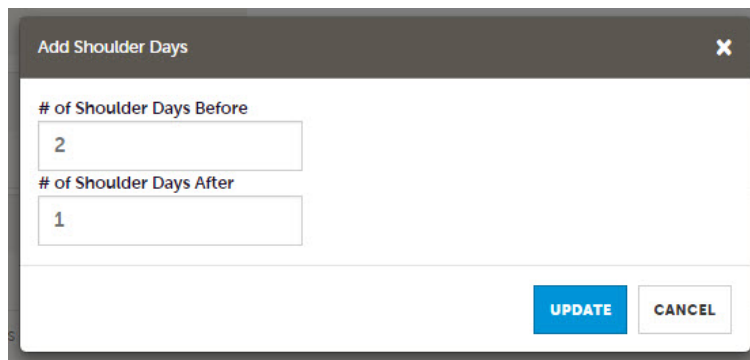
Pickup Avg. Daily Room Rate:

\$ \$0.00

ADD SHOULDER DAYS

Tue	Wed	Thu	Fri	Sat	Sun	Mon
09/29/2015	09/30/2015	10/01/2015	10/02/2015	10/03/2015	10/04/2015	10/05/2015
100	100	200	200	1	2	0

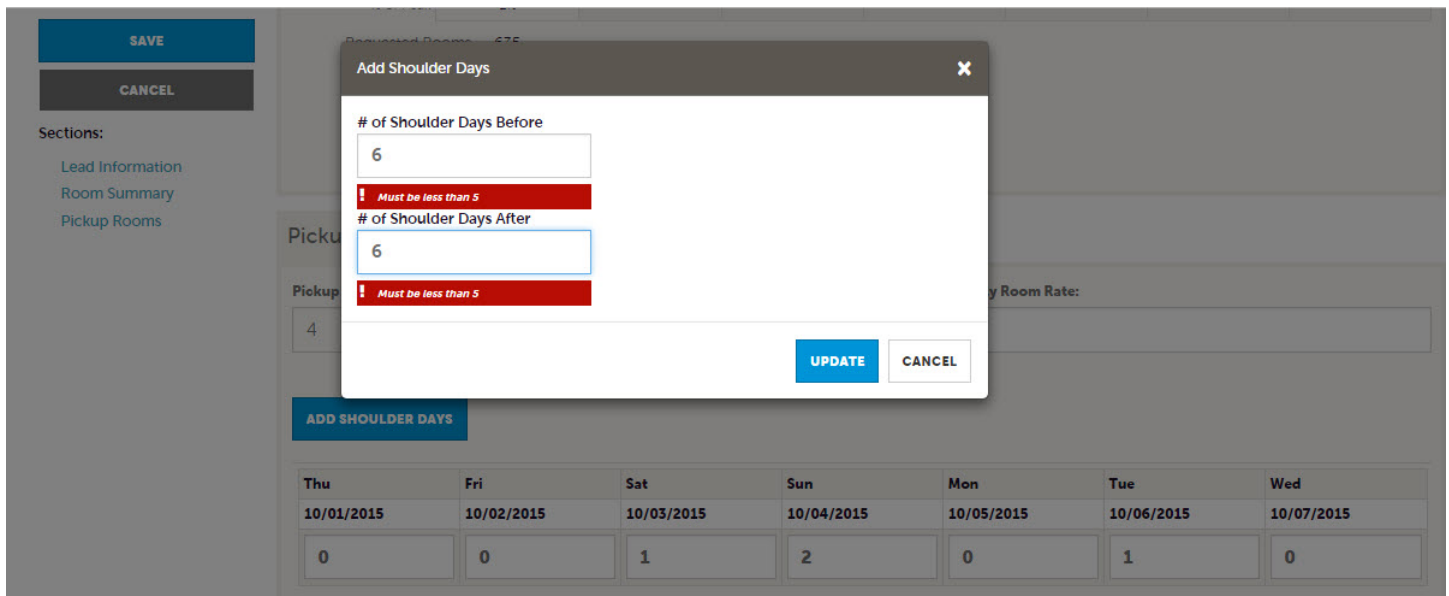
2. Enter the number of days to add before the block or after the block, and click **Save**.



The dialog box is titled "Add Shoulder Days" and has a close button (X) in the top right corner. It contains two input fields: "# of Shoulder Days Before" with the value "2" and "# of Shoulder Days After" with the value "1". At the bottom right, there are two buttons: "UPDATE" (highlighted in blue) and "CANCEL".

Once they click **Update**, the Pickup block will adjust by adding the shoulder dates, as entered. This will update the block on the lead as well so that when other partners attempt to enter Pickup, they will see the same set of block dates, including the newly added shoulder dates.

To have this feature turned on, please reach out to your CRM Analyst. You will be able to indicate to them the max number of shoulder days you would like a partner to be able to enter.



The screenshot shows a CRM interface with a "Pickup" block. A dialog box titled "Add Shoulder Days" is open, displaying the same fields as the previous image, but with the value "6" entered in both the "# of Shoulder Days Before" and "# of Shoulder Days After" fields. Red error messages are visible below each input field, stating "Must be less than 5". The background shows a "Pickup" block with a "4" in a box, and a table of dates and counts.

Thu	Fri	Sat	Sun	Mon	Tue	Wed
10/01/2015	10/02/2015	10/03/2015	10/04/2015	10/05/2015	10/06/2015	10/07/2015
0	0	1	2	0	1	0

Service Requests

Service Requests may be sent to a local business if/when the DMO is in need of quotes for services (transportation, meeting space, catering, entertainment etc.) relating to a meeting or event. The user can log in to review the details of the request & enter a response if need be.

Service Requests

Filters (2)

Use filters to find a specific request

Manage Filters

Start Date:
Next 3 Months

Status is one of:
OPEN

APPLY FILTERS

CLEAR FILTERS

Page 1 of 1 Go to Page: 1

Actions	Service Request	Account	Request Type	Deadline	Start Date	End Date	Attendees	
	2015 Annual Meeting	Simpleview, Inc	Transportation	07/31/2015	08/09/2015		1000	
	2015 Annual Meeting 2	Simpleview, Inc	Transportation	07/31/2015	08/09/2015		1000	

Click " " to review &/or respond to the request.

Request Detail

Request Details

RETURN

Sections:

Request Information

Request Dates

Contact Information

Accounts/Responses

Click to jump to a specific section

Request Information

Sales Manager

Test User

ID

136639

Company

Abbey's Resturant

Lead

CG Test Lead

Request Type

Transportation

Request Name

2015 Annual Meeting

Request Status

Pending

Attendees

1000

Deadline

07/31/2015

Budget

\$5,000

Location

Description

Client needs transportation for attendees from meeting venue to hotel.


Additional Documents

2015-07-01_1051.png

Accounts/Responses

Accounts/Responses

Actions		Response	Won
	Simpleview, Inc	No Response	No

Click "" to enter a response

Entering a Response

Response for Simpleview, Inc ✕

Pursuing: ◀Required

☐ YES ☐ NO

Comments: ◀Required

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

Don't forget to save!

UPDATE CANCEL

- Pursuing (yes/no): Is your business pursuing this opportunity?
- Comments: A brief summary of your proposal. This information may be provided to the meeting planner/tour operator
- Bureau Comments: Enter comments that can be viewed by the DMO, but will not be provided to the meeting planner/tour operator
- Attach File: Add a formal proposal, brochure, menu etc. by clicking to browse your computer to attach a file
- UPDATE: Click to save