

Richmond Region Connect

Extranet User Instructions

richmond.extranet.simpleviewcrm.com





Home Screen

At A Glance is a brief view of an Account's listings and special offers tracking. Clicking on the [See All](#) link to the right, engages a more detailed view of the Account and its interaction with Richmond Region Tourism.

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

Clicking the **Member Profile** icon displays a property's information, such as contacts, account details and information about interaction with Richmond Region Tourism (same as the See All link in the At A Glance section).

Note: Some of these options are just view and/or edit and/or add.

Clicking the **Collateral** icon, displays options for listings/publication guides, special offers, calendar of events, media (i.e. images), occupancy data, and materials requests from Richmond Region Tourism.

Note: Some of these options are just view and/or edit and/or add.

Clicking the **Opportunities** icon, displays options for RFPs sent by Richmond Region Tourism. Opportunities are broken in to RFPs (Meeting and Tour Leads), Media Leads (travel writer RFPs) and Service Requests (non-room specific RFPs).

Clicking the **Reports** icon, displays reports Richmond Region Tourism has posted. To view a report just click the name of the report.



Filters and Data Grids

Before we start looking at the extranet, let's take some time to discuss settings that can be customized by each user for themselves in the extranet.

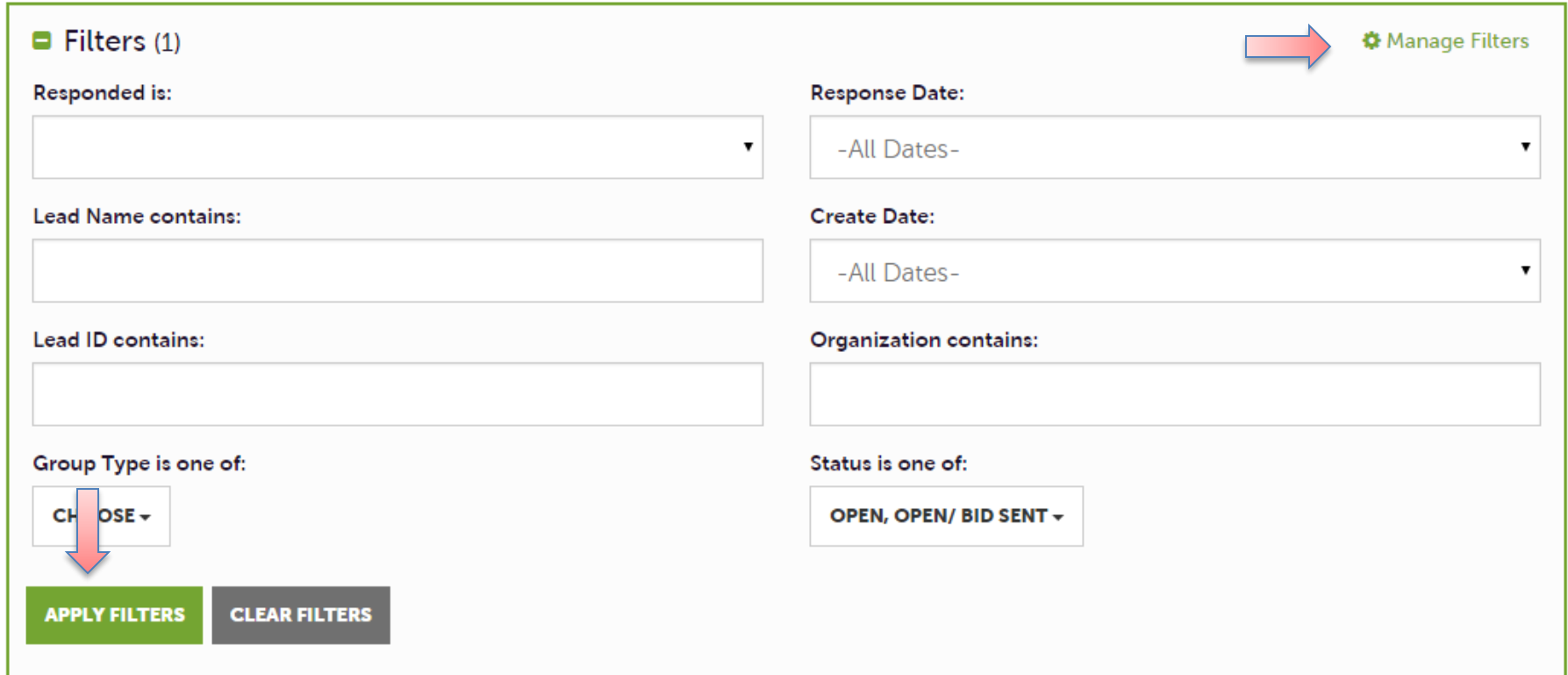
1. **Filters** – Several pages of the extranet will contain a Filters section. This section allows you to narrow down the results displayed on the page. The default filters can be adjusted by clicking the **Manage Filters*** option in the top right corner of this section.
2. **Data Grids** – When viewing pages with filter options, just below the filters is a data grid. This data grid will display a list of records matching the criteria specified in the filters. Each default column heading in a data grid can be modified by clicking the **sprocket*** icon in the top right corner of the grid.

* Remember, any adjustments made with the **sprocket** or the **Manage Filters** apply only to the person making the changes.



Filters and Data Grids

RFPs



The screenshot displays the 'RFPs' filter interface. At the top left, there is a section titled 'Filters (1)' with a minus icon. To the right of this section is a red arrow pointing right and a 'Manage Filters' button with a gear icon. The filter criteria are organized into two columns. The left column includes: 'Responded is:' with a dropdown menu; 'Lead Name contains:' with a text input field; 'Lead ID contains:' with a text input field; and 'Group Type is one of:' with a dropdown menu showing 'CHOOSE'. The right column includes: 'Response Date:' with a dropdown menu showing '-All Dates-'; 'Create Date:' with a dropdown menu showing '-All Dates-'; 'Organization contains:' with a text input field; and 'Status is one of:' with a dropdown menu showing 'OPEN, OPEN/ BID SENT'. At the bottom left, there are two buttons: 'APPLY FILTERS' (green) and 'CLEAR FILTERS' (grey). A red arrow points down to the 'APPLY FILTERS' button.





Here is an example of the RFPs filter page. Once the desired criteria have been set in the filters, click the **Apply Filters** button to see the results. Notice the **Manage Filters** button that was mentioned previously.



Filters and Data Grids (cont'd)

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 Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

Once the filters have been applied, the data grid will update with the matching results. Several icons may appear on the records within the grid. The appearance of these icons will depend on the page being viewed.

These icons are:

1. **Pencil** – allows editing of a record
2. **Eyeball** – allows viewing of a record
3. **Clone** – allows duplicating of a record
4. **Add Button** - Depending on the page, an Add button may appear in the top left of the data grid. When this option is available, clicking allows the addition of a new record.

Notice the **sprocket** icon that was mentioned previously.



Filters and Data Grids (cont'd)

The screenshot displays the 'RFPs' interface. On the left, the 'Filters (1)' section is active, showing various filter criteria: 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', 'Group Type is one of:', 'Response Date:', 'Create Date:', 'Organization contains:', and 'Status is one of:'. Each criterion has a corresponding input field or dropdown menu. On the right, a menu is open with three tabs: 'Columns', 'Filters', and 'Ordering'. The 'Filters' tab is selected, showing a list of available filters: 'Account', 'Arrival (Preferred)', 'Create Date', 'Decision Date', 'Departure (Preferred)', 'Group Type', and 'Lead ID'. The 'Create Date' and 'Group Type' filters are currently selected and highlighted in green. Below each selected filter, there is a dropdown menu to choose its default value. For 'Create Date', the value is '-All Dates-'. For 'Group Type', the value is 'CHOOSE'.

Clicking on the **sprocket** icon or the **Manage Filters** button will trigger a menu as shown here. This menu provides options for personalizing the filters, data grid columns, and ordering of each. By changing these options, changing of these options effects ONLY the person making the changes.



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 on the left of the page. If you are viewing the account , the top left will display an Edit button. If you are editing the account , the top left will display a Save button. You must click the Save button before changes are applied!



Manage Profile - Contacts

Contacts

Filters (0) [Manage Filters](#)

Account is one of:

Contact Type is:

Page 1 of 1 Go to Page:

Actions	Full Name	Account	Title	Email	Contact Type
<input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Clone"/>	Angel Berry	Simpleview Hotel and Conference Center		aberry@simpleviewinc.com	Primary
<input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Clone"/>	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, or Clone (i.e. duplicate) a contact depending upon your extranet permissions.



Manage Profile - Contacts (cont'd)

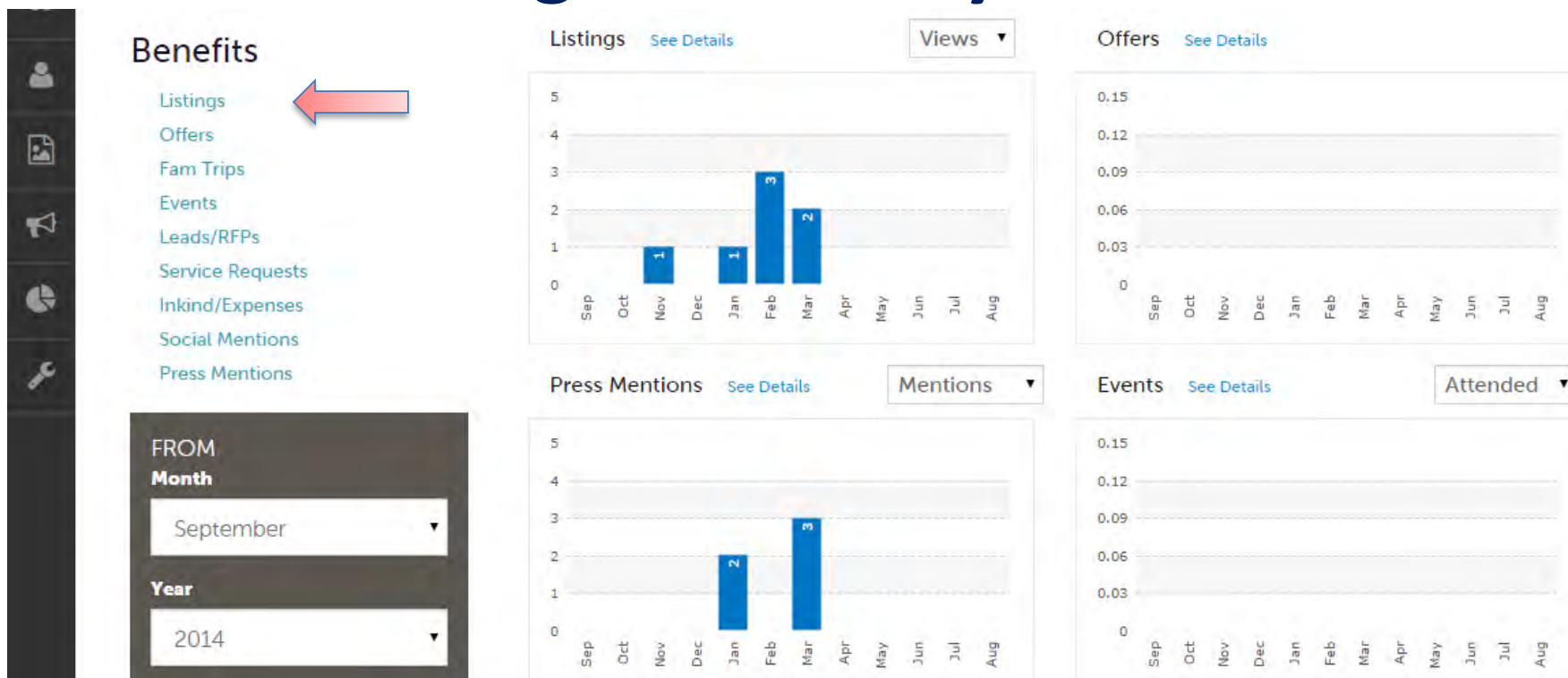
The screenshot shows a web interface for updating a contact. On the left is a dark sidebar with icons for user profile, images, announcements, analytics, and settings. The main content area is titled 'Update Contact' with a red arrow pointing to a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' list with links: 'Contact Information' (highlighted with a red arrow), 'Address Information', 'Phone Information', 'Additional Information', 'ecomm', 'Social Media', and 'General'. The 'Contact Information' section is expanded, showing fields for 'Account:' (Simpleview Hotel and Conference Center), 'First Name:' (Angel), 'Last Name:' (Berry), 'Full Name:' (Angel Berry), 'Department:', 'Title:', 'Contact Type:' (Primary, highlighted with a red arrow), and 'Preferred Contact Method:' (Email). Red text 'Required' appears next to Account, First Name, Last Name, Full Name, and Contact Type.

When you view or edit a contact, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a contact, the top left will display an Edit button. If you are editing a contact, the top left will display a Save button. You must click the Save button before changes are applied!

IMPORTANT NOTE: If a contact has left your property it is your responsibility to notify Richmond Region Tourism 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 with summary reports based on Richmond Region Tourism's interaction with your property. The information you see on this page is specifically related to your property.






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

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

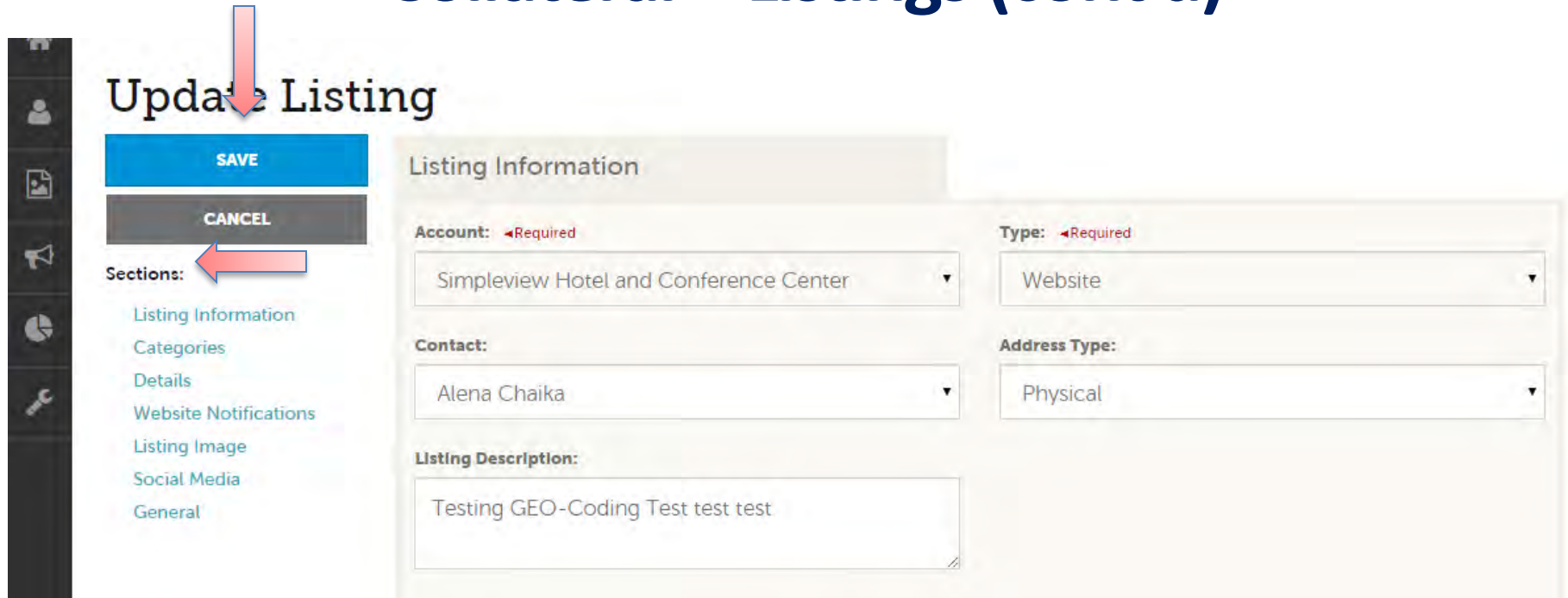
Page 1 of 1 Go to Page: 1

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 Richmond Region Tourism has enabled this feature.



Collateral – Listings (cont'd)



The screenshot shows a web interface for updating a listing. On the left is a dark sidebar with icons for user, image, notification, and settings. Below these is a 'Sections:' menu with links: Listing Information, Categories, Details, Website Notifications, Listing Image, Social Media, and General. The 'Listing Information' link is highlighted with a red arrow. At the top of the main content area is the title 'Update Listing' with a red arrow pointing down to a blue 'SAVE' button and a grey 'CANCEL' button. The main form area is titled 'Listing Information' and contains several fields: 'Account:' (Required) with a dropdown menu showing 'Simpleview Hotel and Conference Center'; 'Type:' (Required) with a dropdown menu showing 'Website'; 'Contact:' with a dropdown menu showing 'Alena Chaika'; 'Address Type:' with a dropdown menu showing 'Physical'; and 'Listing Description:' with a text area containing '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 top left will display an Edit button. If you are editing a listing, the top left will display a Save button. You must click the Save button before changes are applied!

IMPORTANT NOTE: Any edits or adding of listings will require approval from Richmond Region Tourism. Upon saving your updates, Richmond Region Tourism will be notified of your changes/additions.



Collateral – Listings (cont'd)

SAVE

CANCEL

Sections:

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

Email To Notify:

Notification Interval:

0

Listing Image

Listing Images:

HOTEL (IMAGES2.JPG) ▾

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 previously, any edits or adding of listings will require approval from Richmond Region Tourism. Upon saving your updates, Richmond Region Tourism will be notified of your changes/additions.


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 will display a Save button. You must click the Save button before changes are applied! As with listings, you have the ability to attach images to your offers (**square format - minimum image size: 600 x 600 @ 72 dpi**).

IMPORTANT NOTE: Any edits or adding of offers will require approval from Richmond Region Tourism. Upon saving your updates, Richmond Region Tourism 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

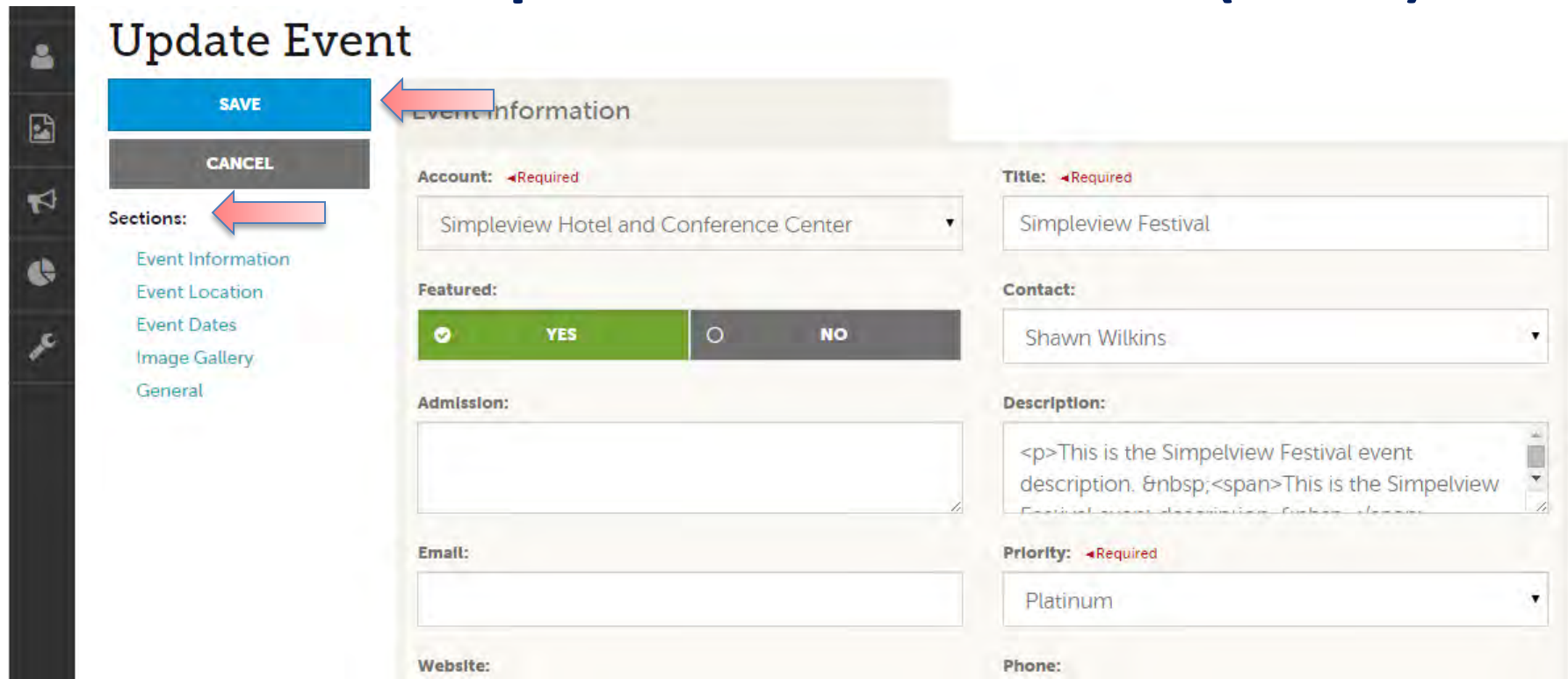
Actions	Event ID	Title	Priority	Start Date	End Date	Event Category	
	57	Bossista	Gold	07/07/2015	07/07/2015	Family, Arts and Culture, Historical	
	59	Simpleview Festival	Platinum	07/08/2015	07/08/2015	Sports, Family	

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)



The screenshot shows a web interface for updating an event. On the left is a dark sidebar with icons for user, image, location, dates, gallery, and general settings. The main area is titled 'Update Event'. Below the title are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. To the right of these buttons is a 'Sections:' list with links: 'Event Information' (highlighted with a red arrow), 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The 'Event Information' section is expanded, showing a form with the following fields: 'Account:' (dropdown menu with 'Simpleview Hotel and Conference Center' selected), 'Title:' (text input with 'Simpleview Festival'), 'Featured:' (radio buttons for 'YES' (selected) and 'NO'), 'Contact:' (dropdown menu with 'Shawn Wilkins' selected), 'Admission:' (text input), 'Description:' (text area with placeholder text), 'Email:' (text input), 'Priority:' (dropdown menu with 'Platinum' selected), and 'Website:' and 'Phone:' (text inputs). A red arrow points to the 'SAVE' button.

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. </p>

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 top left will display an Edit button. 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 Richmond Region Tourism. Upon saving your updates, Richmond Region Tourism will be notified of your changes/adds.



Collateral – Special Calendar of Events (cont'd)

The screenshot displays a web form for creating a calendar event. On the left, a sidebar contains a 'SAVE' button (blue) and a 'CANCEL' button (grey). Below these are the 'Sections:' listed: Event Information, Event Location, Event Dates, Image Gallery, and General. The main form area has a recurrence selector at the top with buttons for 'One Day', 'Daily', 'Weekly' (highlighted in green), 'Monthly', and 'Yearly'. A red arrow points to the 'Weekly' button. Below this is the 'Weekly Recurrence Options' section, which includes a green bar with a checked checkbox, the text 'Every 1 Week(s) on MONDAY, TUESDAY, WEDNESDAY', and a dropdown arrow. A red arrow points to this dropdown. The 'Recurrence End' section follows, with three options: 'No End Date' (grey), 'End after 0 occurrences' (grey), and 'End on 09/30/2015' (green). Two red arrows point to the 'End after' and 'End on' options respectively.

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)

SAVE

CANCEL

Sections:

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

Image Gallery

Drag and Drop Files here

or use the "Browse" button below to find files to add

BROWSE

As with Listings and Special Offers you can add images to your event (**square format - minimum image size: 600 x 600 @ 72 dpi**). 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

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 available for use on listings and special offers. The pencil icon will allow you to edit an existing image. By clicking the red x icon, you can delete an existing image. The clone icon will allow you to duplicate an image.

Please make sure images are: **square format - minimum image size: 600 x 600 @ 72 dpi**



Collateral – Media (Cont'd)


The screenshot displays a web interface for managing media collateral. On the left, a dark sidebar contains a wrench icon. The main content area has a top section with a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' label and a link for 'Media Information'. The main form area includes a dropdown menu labeled 'Image' with a downward arrow. A 'Description:' label is followed by a large text input field. Below that is a 'File:' label and a large area for file management. This area contains the text 'Drag and Drop File To Page' with a red arrow pointing left, and 'or use the "Browse" button below to find a file to add'. Below this text are two buttons: a blue 'BROWSE' button and an orange 'REMOVE' button. Further down is a 'Listings:' label and a dropdown menu labeled 'CHOOSE AMONG THE FOLLOWING...' with a red arrow pointing left. At the bottom of the file management area, there is a note: 'You can drag a file to the page to replace this file or use the "Browse" button'.

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: 1

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: **SIMPLEVIEW HOTEL AND CONFERENCE CENTER** Year: **2015** Entry Mode: ☒ **BY PERCENT** ☐ **BY OCCUPANCY**

You have unsaved changes

SAVE **RETURN**

Simpleview Hotel and Conference Center					
Year	Month	% Occupied	Rms Occupied	Available	Rate
2015	January	88.00	1,056	1,200	\$175.00
2015	February	93.00	1,116	1,200	\$189.00

Once you click the pencil icon to add/edit your occupancy number, you will be presented with a grid of all the months 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

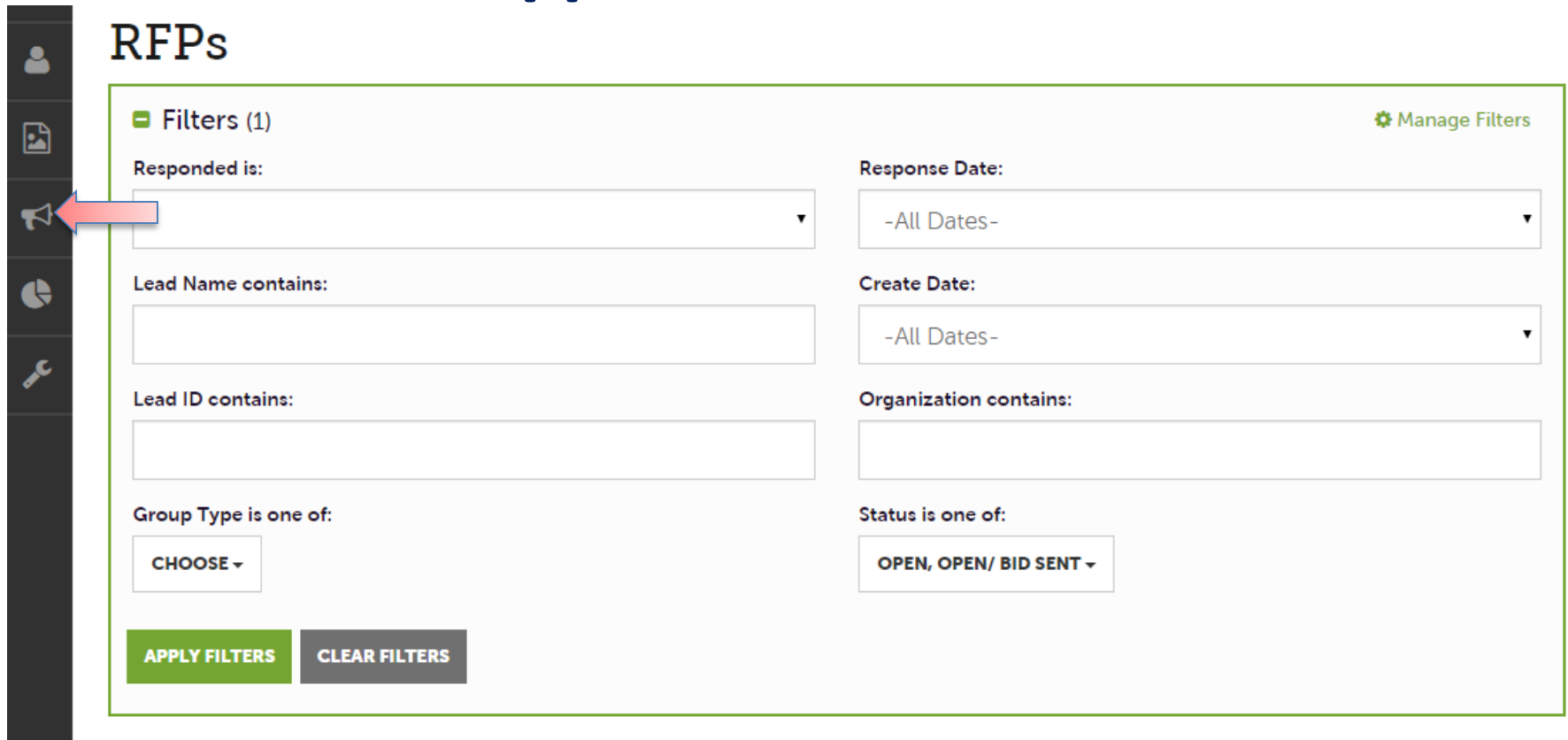
Actions	Order ID	Send Date	Full Name	Company	City/State/Zip	Items Ordered	
  	1384	08/07/2015	Shawn Wilkins	Simpleview Hotel and Conference Center	Tucson, AZ 85741	300	

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After you click the Collateral icon and then Materials Request, you will be presented with a list of orders you have submitted to Richmond Region Tourism. This feature will allow you to request collateral such as publication guides from Richmond Region Tourism. 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. Upon editing or creating a new request, you will be presented with an order form, just enter the quantity of each product you are requesting. Upon clicking the Save button, Richmond Region Tourism will be notified of your request.



Opportunities – RFPs



RFPs

Filters (1) Manage Filters

Responded is:	Response Date:
<input type="text"/>	<input type="text" value="-All Dates-"/>
Lead Name contains:	Create Date:
<input type="text"/>	<input type="text" value="-All Dates-"/>
Lead ID contains:	Organization contains:
<input type="text"/>	<input type="text"/>
Group Type is one of:	Status is one of:
<input type="text" value="CHOOSE"/>	<input type="text" value="OPEN, OPEN/ BID SENT"/>

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. The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the Apply Filters button. By Default, you will see all of your Open Leads and Opens Leads you have already bid on.



Opportunities – RFPs (cont'd)

LEAD STATUS DEFINITIONS



On the extranet you will see 10 different statuses in which a Lead can be in. These statuses are:

- 1. Closed / No Bid Sent:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Closed/No Bid Sent status signifies this is business your property did not bid on and the response due date has passed.
- 2. Open:** These are Leads in a tentative status that your property has not bid on and the response due date has not passed.
- 3. Open / Bid Sent:** These are Leads in a tentative status that your property has already placed a bid on and the response due date has not passed. In this status, you can update your response at any time.
- 4. Turned Down:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.
- 5. Closed / Decision Pending:** These are Leads in a tentative status that your property has placed a bid on, but the response due date has passed thus you cannot edit your response.
- 6. Closed / Lost to Another City:** These are Leads you were pursuing, but the business has been lost.
- 7. Closed Cancelled:** These are Leads where you won the business, but the group has cancelled.
- 8. Closed / Won:** These are definite Leads in which your property was selected.
- 9. Closed / Won - Properties TBD:** These are definite Leads but the group has not decided on a hotel yet.
- 10. Closed Lost:** These are definite Leads in which your property was not selected for the business.



Opportunities – RFPs (cont'd)

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Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016	
	12005	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016	

Below the filters section, you will see a data grid with all your Leads based on the selected filters. 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. One of the more important column headings is the Group Type. This signifies if you are looking at a Meeting Sales or Tour Lead.

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



Opportunities – RFPs (cont'd)

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.



Opportunities – RFPs (cont'd)

RETURN

Sections:

Lead Information

Meeting Dates

Additional Lead Information

Room Summary

History/Futures

Notes

Responses

Signage

General

Room Data

Notes

File	Title	Category	Description
	2016 Annual Convention RFP	Spec Sheet	See attached RFP

Responses

Simpleview Hotel and Conference Center

Status Open

Currently Assigned None (Assign)

PRINT RESPONSE LOG

ADD NEW CONTRACT

Add/Edit	Room Request Dates	Pursuing?	Comments
	02/01/2016 - 02/05/2016		

When scrolling to the Notes section, you will see the detailed notes for this piece of business. If an attachment is present, this will be signified with a paperclip icon. After you have reviewed the Lead, scroll to the Responses section. Here you will see options to either add or edit your existing response. Note: these options are not available once the Response Due Date has passed. Click the Add Response button or Pencil icon to enter/edit your response.



Opportunities – RFPs (cont'd)

Update Response

SAVE

CANCEL

Sections:

Lead Information

Response Information

Room Information

File Attachments

Lead Information

Section Collapsed, click header to expand.

Response Information

Pursuing this lead: Required

☐ NO

☐ YES

Account: Required

Simpleview Hotel and Conference Center

Comments: Required

When adding/editing your response, you will need to tell Richmond Region Tourism if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option



Opportunities – RFPs (cont'd)

SAVE

CANCEL

Sections:

Lead Information

Response Information

Room Information

File Attachments

Room Information

	Mon 02/01/2016	Tue 02/02/2016	Wed 02/03/2016	Thu 02/04/2016	Fri 02/05/2016	Sat 02/06/2016	Sun 02/07/2016
Doubles	0	0	0	0	0		
Multiple	0	0	0	0	0		
Kings	0	0	0	0	0		
Suites	0	0	0	0	0		
Singles	0	0	0	0	0		
Queen Room	0	0	0	0	0		
Total	0	0	0	0	0		
Requested	10	10	10	10	10		

The Room Information section of the response page is where you can enter the number of rooms, by room type, that your property can commit to for this Lead.



Opportunities – RFPs (cont'd)

The screenshot displays a web interface for responding to RFPs. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these, a 'Sections:' list includes 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'SAVE' button to the top of the main content area. Another red arrow points from 'File Attachments' to the 'File Attachments' section header. The main content area features a table with the following data:

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

Below the table is the 'File Attachments' section, which contains an 'ATTACH FILE' button, the text 'or drag files to the page', and a message stating 'No files have been attached'. A red arrow points from the 'ATTACH FILE' button to the text 'or drag files to the page'.

To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section.

Once you have finished entering all your response information don't forget to click the save button!



Opportunities – Service Requests

Service Requests

Filters (1) [Manage Filters](#)

Status is one of:

OPEN, OPEN / BID SENT ▾

APPLY FILTERS **CLEAR FILTERS**

Page 1 of 1 Go to Page: 1

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

By clicking the 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 the service request or click the name of the request.



Opportunities – Service Requests (cont'd)

The screenshot displays a web interface for managing service requests. On the left, a sidebar contains a 'RETURN' button and a list of sections: 'Request Information', 'Request Dates', 'Contact Information', 'Additional Notes and Documents', and 'Accounts/Responses'. The main content area shows details for a request with the following fields:

- 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](#)

Below the details, a message states: 'Section Collapsed, click header to expand.' The 'Additional Notes and Documents' section is expanded, showing a table with the following data:

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

Red arrows in the image point to the 'Request Information' section in the sidebar, the 'Description' field, the '2016-Annual-Convention-RFP.docx' link, the 'Additional Notes and Documents' section header, and the download icon in the table.


When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads.

Depending upon Richmond Region Tourism's preferences, this information may be contained in the Additional Notes and Documents section of the Service Request.



Opportunities – Service Requests (cont'd)

Accounts/Responses

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

General

Response for Simpleview Hotel and Conference Center

Pursuing: **Required**

☐ YES ☐ NO

Comments: **Required**

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



Opportunities – Service Requests (cont'd)

Accounts/Responses

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

General

Decision Date

Food / Beverage

Misc. Expense

Category

Economic Value - Lauren Test

Bureau-Only Comments:

These comments will not be seen by the client. They will only be seen by bureau staff.

ATTACH A FILE

No files have been attached

UPDATE CANCEL

As you scroll down the response page on the right, you have the ability to attach proposals by clicking Attach File button or click and drag the file from your computer. Be sure to scroll to the button and click the Update button to save your changes!



Opportunities – RFP Pickup

A part of your Lead process may be to add room Pickup information. This data can only be added to RFPs that your Property has won and if the DMO has identified you as a Pickup Manager.



Opportunities – RFP Pickup (cont'd)

The screenshot shows a 'Filters (1)' panel with a 'Manage Filters' link. The filter grid includes the following fields:

- Responded is:** A dropdown menu.
- Lead Name contains:** A text input field.
- Lead ID contains:** A text input field.
- Group Type is one of:** A dropdown menu with a 'CHOOSE' button. A red arrow points to this field.
- Response Date:** A dropdown menu with '- All Dates -' selected.
- Create Date:** A dropdown menu with '- All Dates -' selected.
- Organization contains:** A text input field.
- Property Lead Status is one of:** A dropdown menu showing '3 SELECTED'. A red arrow points to this dropdown.

The 'Property Lead Status' dropdown is expanded, showing the following options:



- Closed/ No Bid Sent
- Open ✓
- Open/ Bid Sent ✓
- Turned Down
- Closed/ Decision Pending
- Closed/ Lost to Another City
- Closed/ Cancelled
- Closed/ Won ✓
- Closed/ Won - Properties TBD
- Closed/ Lost
- Assist

At the bottom of the filter panel are two buttons: 'APPLY FILTERS' and 'CLEAR FILTERS'.

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



Opportunities – RFP Pickup (cont'd)

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12169	Simpleview Summit 2016	Closed/Won	11/25/2015	Meeting	Convention	chris martin account	Simpletime z hotel	12/31/2015	04/18/2016	04/20/2016	
	10058	Karate for Kids Meeting 2015	Closed/Won	01/01/2007	Meeting	Group	Karate for Kids	Hilton by the Shore	12/01/2015	12/15/2015	12/18/2015	

To access the Lead, click on the Eyeball icon or the Lead Name.



Opportunities – RFP Pickup (cont'd)

RETURN

Sections:

Additional Lead Information

Lead Information

Meeting Dates

Room Summary

History/Futures

Notes

Responses

Room Data

Signage

General

Lead ID10058

Meeting NameKarate for Kids Meeting 2015

AccountHilton by the Shore

ProfileKarate Affiliation

OrganizationKarate for Kids

Organization4956 N Park Ln

AddressBonham TX 75418

ContactRita Duncan

4956 N Park Ln

Bonham TX 75418

United States

520-424-1020 (Ext. 680)

rduncan@karateforkids.com

Meeting Planner Contact

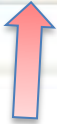
When viewing the Lead, you can skip to different sections by clicking the left navigation. In the above graphic, this is the Lead Information section; Pickup information is contained within the Room Data section.



Opportunities – RFP Pickup (cont'd)

Room Data

Add/Edit	Property	Booked Rooms by Days Out				Total Pickup
		120 Days	90 Days	60 Days	30 Days	
Daysout Pickup	Hilton by the Shore					



Click on the Pickup button to access the room block information.



Opportunities – RFP Pickup (cont'd)

SAVE

CANCEL

Sections:

Lead Information

Room Summary

Pickup Rooms

Peak requested: 25

Additional room requests/needs

Pickup Rooms

Pickup Rooms:

0

Pickup Avg. Daily Room Rate:

\$ \$0.00

Sun	Mon	Tue	Wed	Thu	Fri	Sat
12/20/2015	12/21/2015	12/22/2015	12/23/2015	12/24/2015	12/25/2015	12/26/2015
0	0	0	0			

The Pickup Rooms section is where you can enter the number of rooms and average daily room rate, that your property provided for this Lead.

Be sure to click the Save after you have supplied the appropriate room information.

