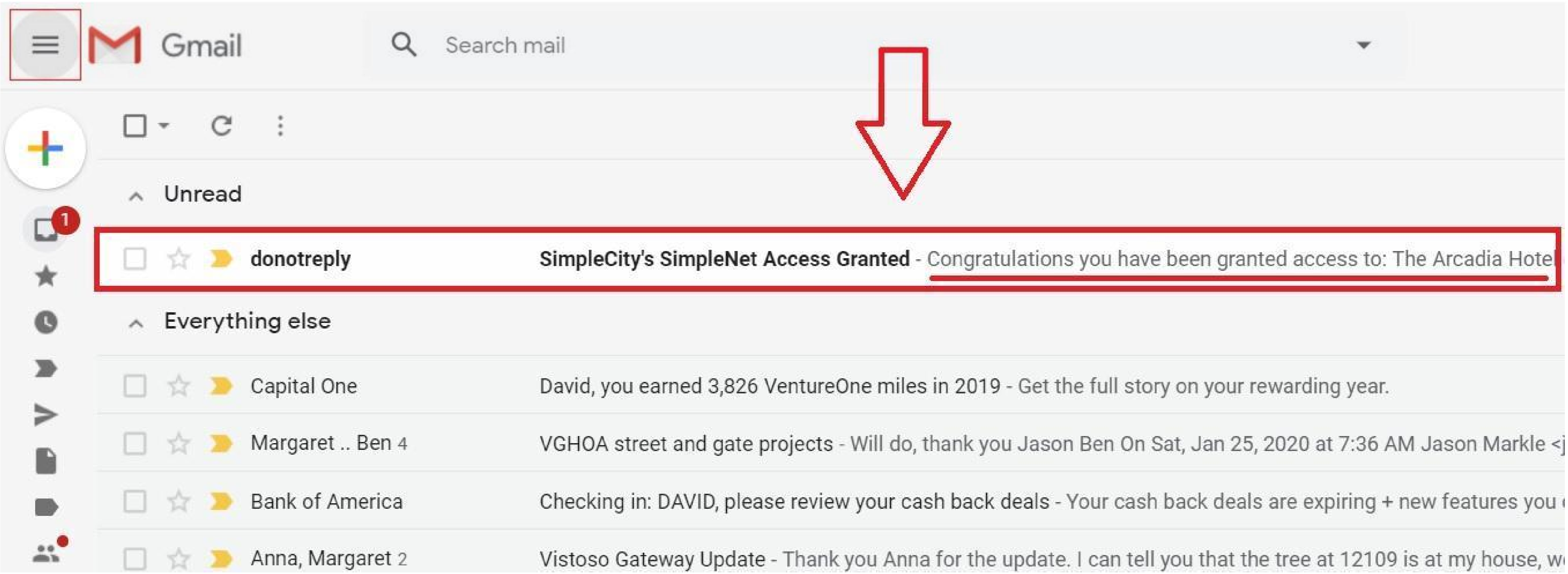
How Do I Access the Partner Portal?

The **SimpleCity's** staff has granted (or will grant) you access by updating your contact record in their Simpleview CRM. Once that happens you will receive an email.



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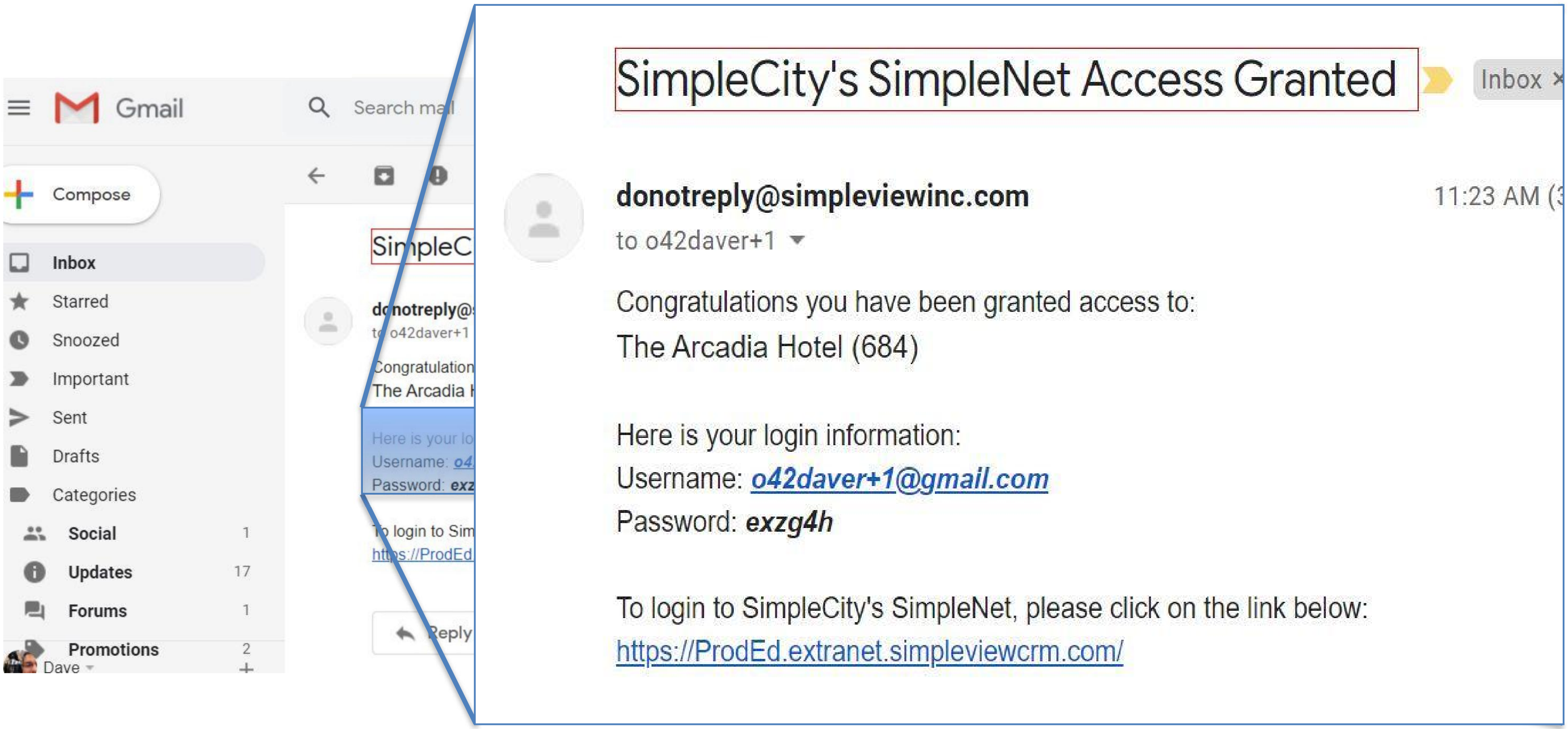
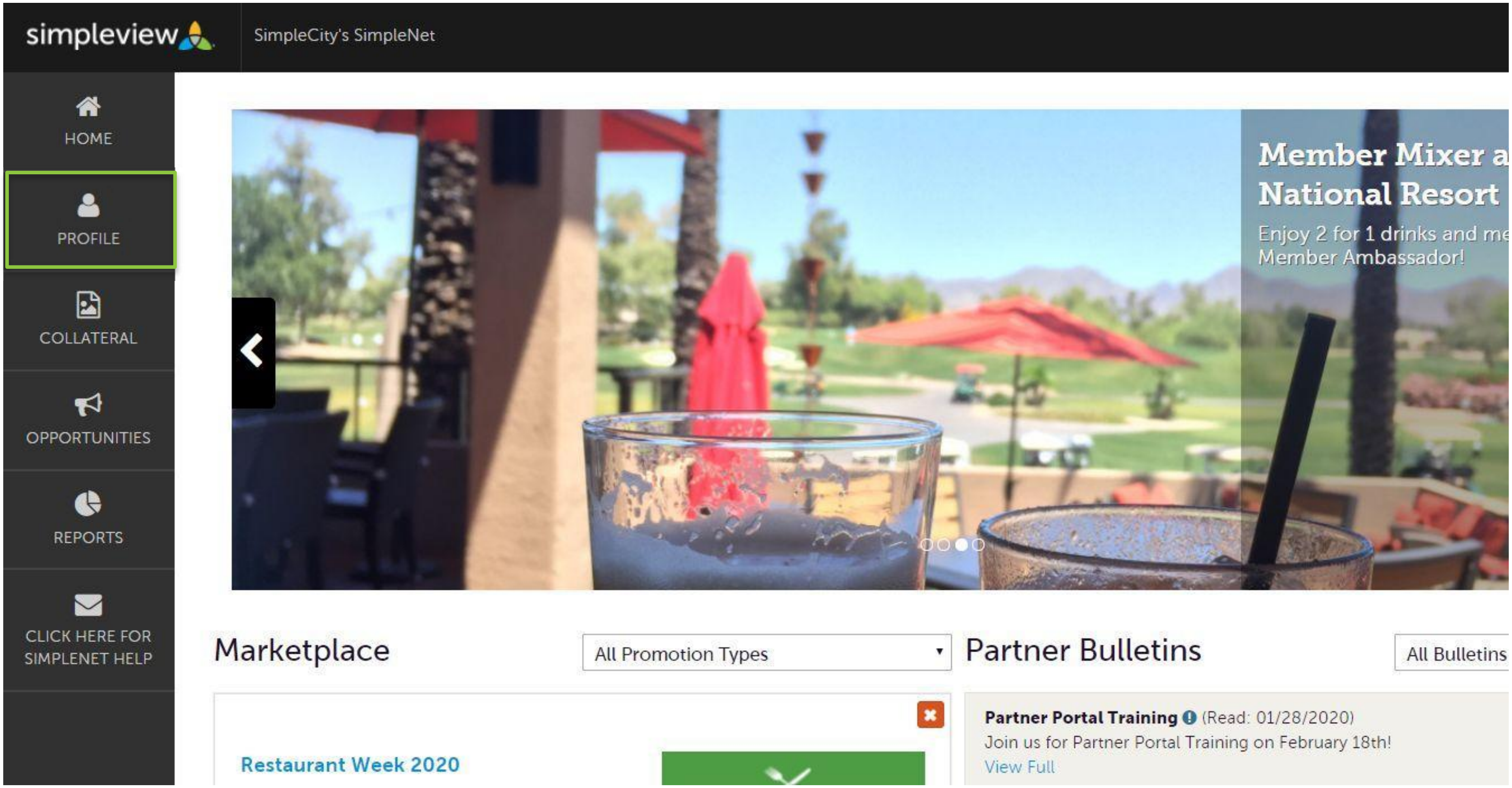


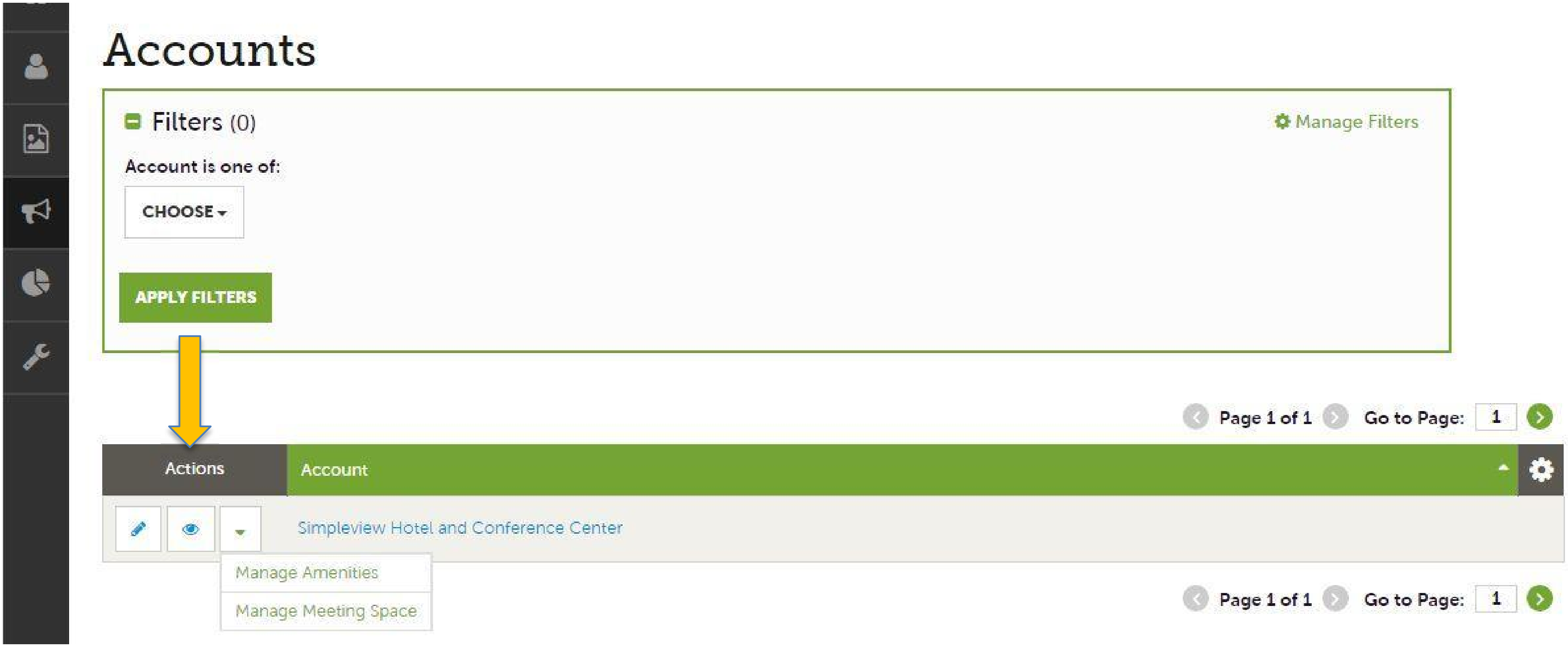
Profile



Clicking the **Profile** icon displays and provides access to your Account information, Contacts, and My Benefits section.

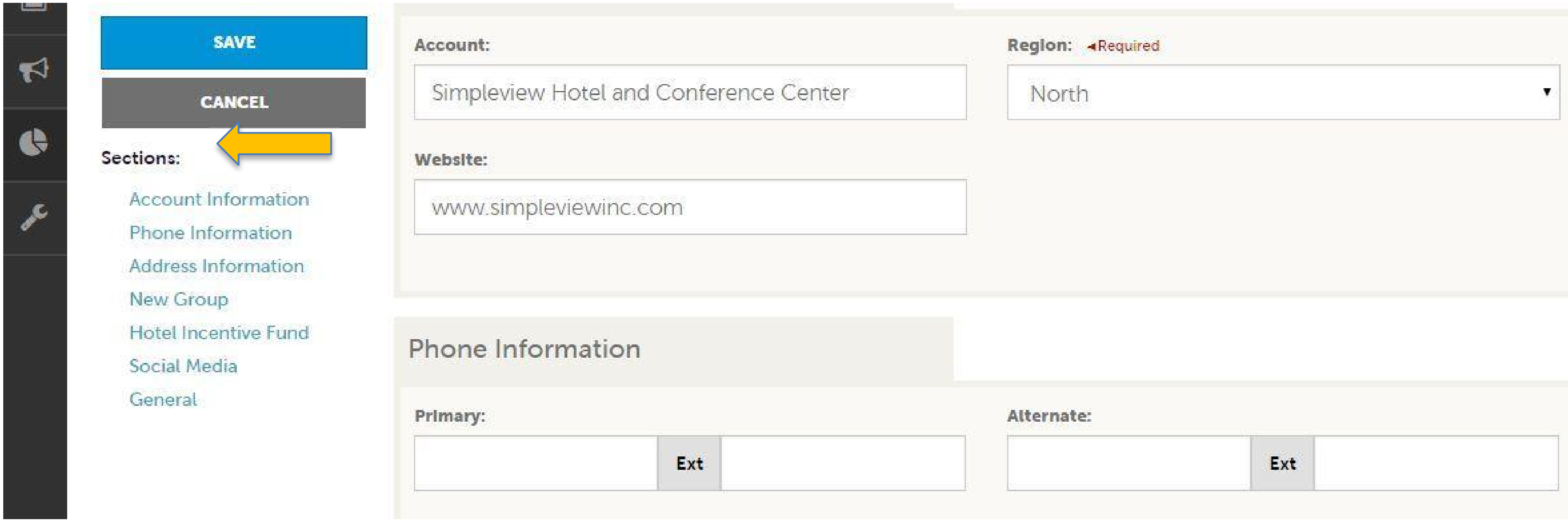
Note: These options are available or limited by the Bureau.

Manage Profile - Accounts



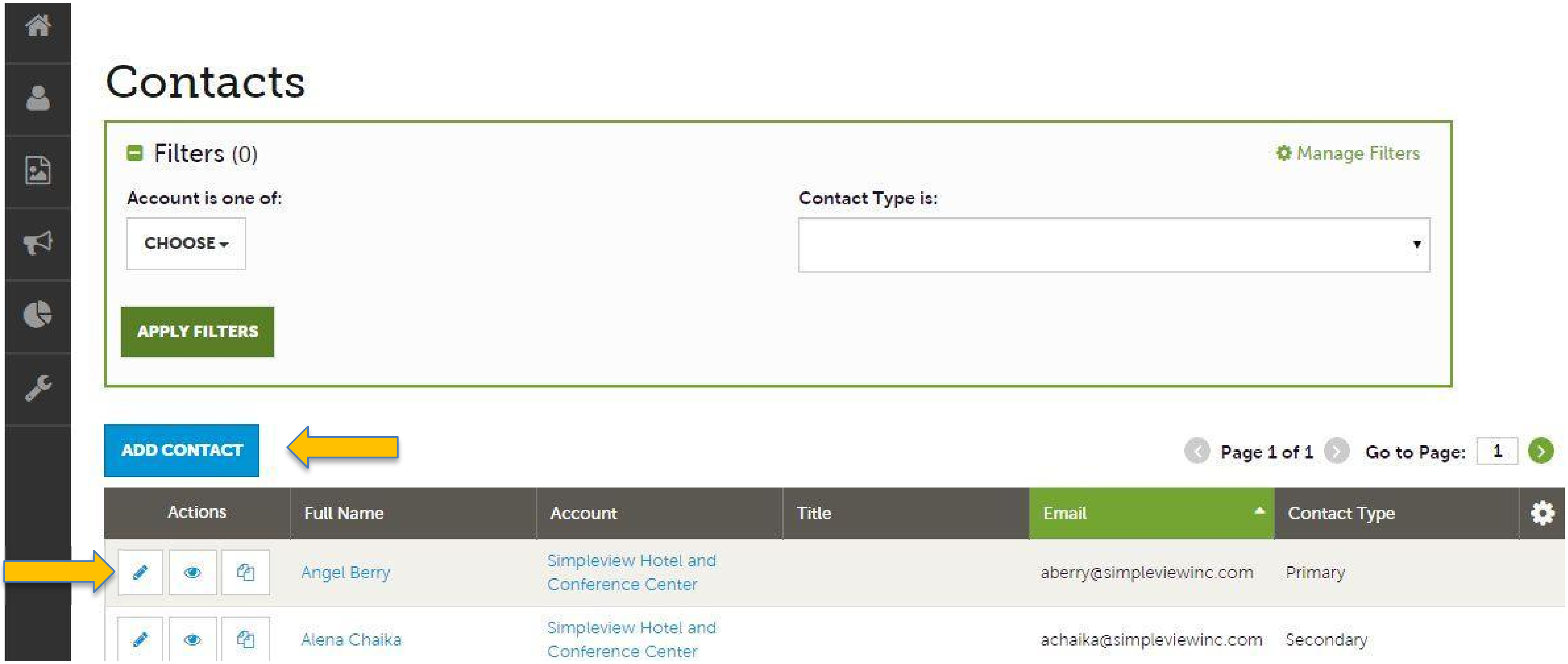
After you click the Profile icon and then Accounts, you will be presented with your account name and various actions you can perform. If you see multiple account names, this is due to your property being associated with another property. The pencil icon will allow you to edit your property information.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



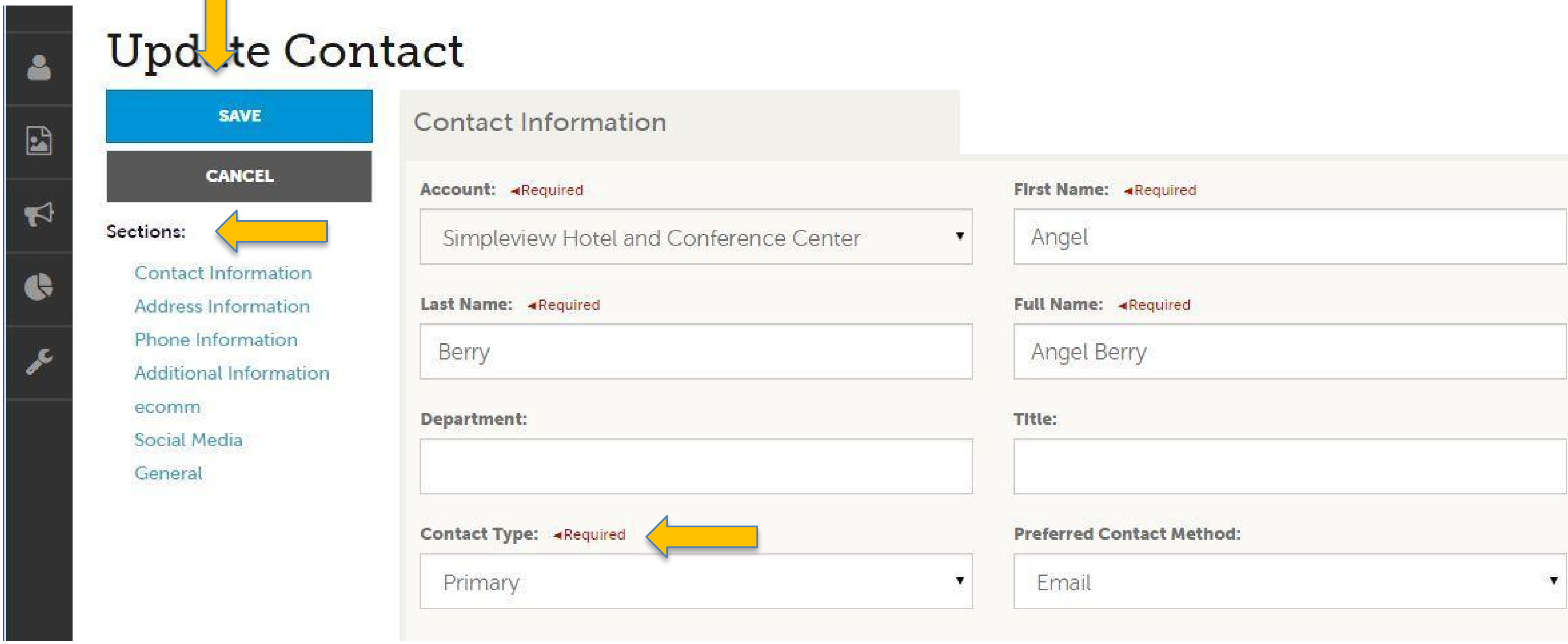
When you view or edit your property information, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing the account , the top left will display an Edit button. If you are editing the account , the top left will display a Save button. You must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

Manage Profile - Contacts



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 Partner Portal permissions.

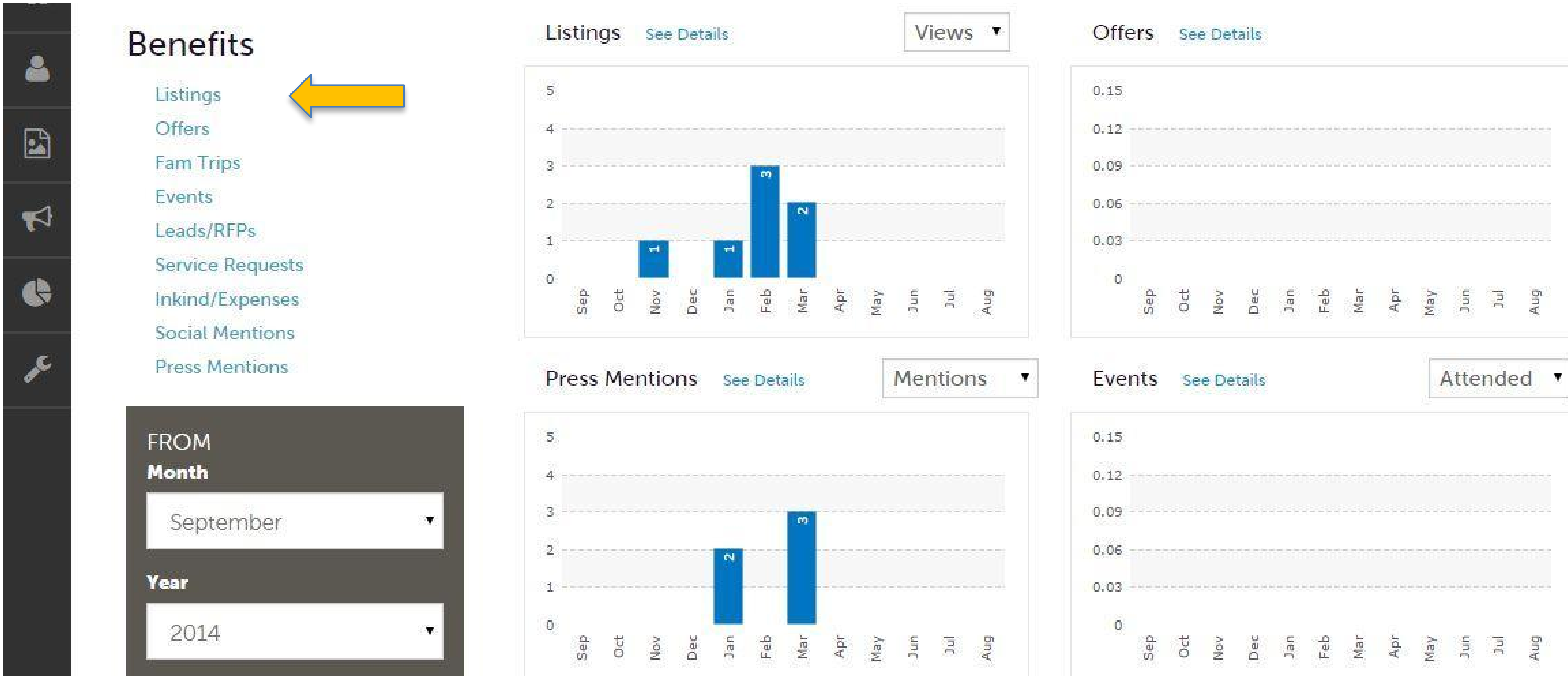
Manage Profile - Contacts (cont'd)



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 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!

<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 on the Bureau's interaction with your property. The information you see on this page is specifically related to your property.