



SLO CAL Connection Checklist

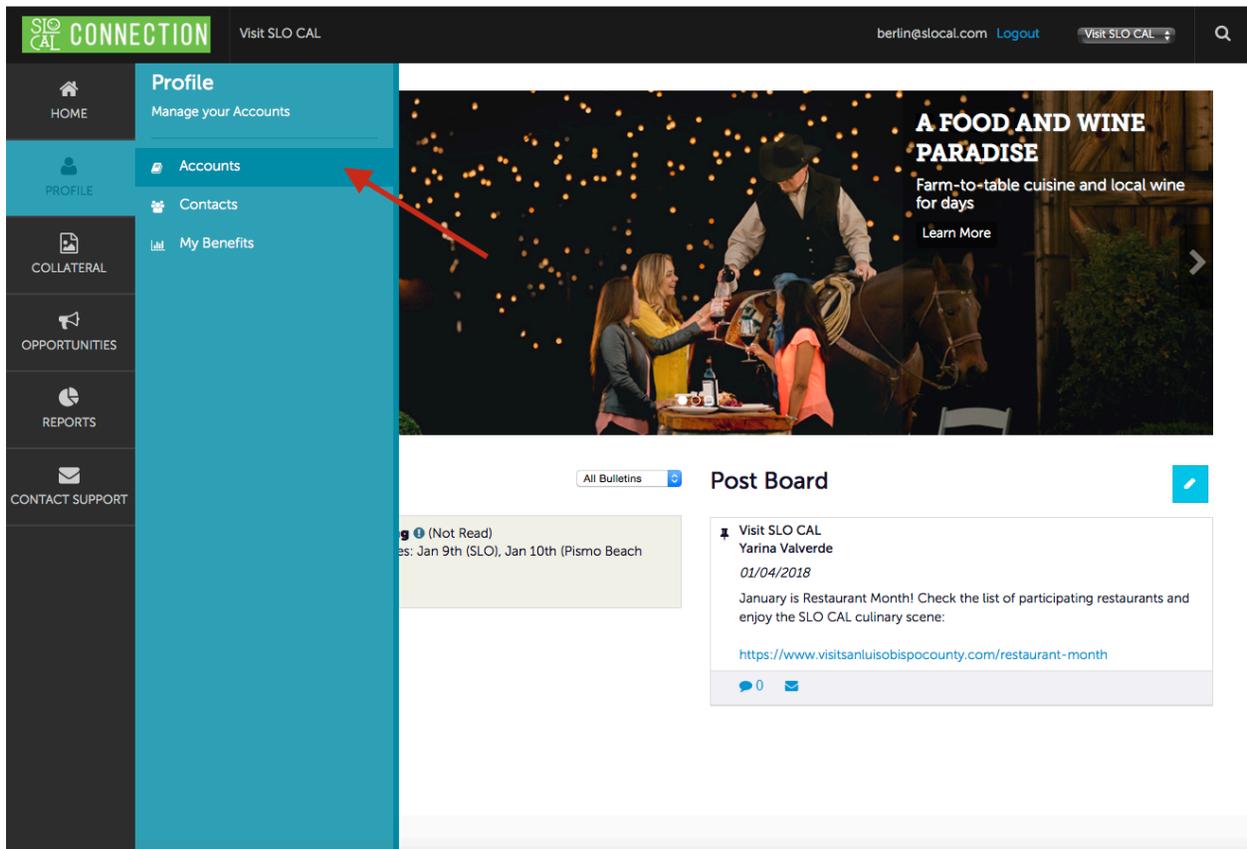
Initial Login Checklist

Here are the first steps to setting up your account. A full training video is available here: <https://www.slocal.com/partners/membership/log-in/>

Update your account information

Ensure your account and contact information is accurate and complete. Doing so will ensure the correct information is displayed on our website.

1. After logging in (<https://slocal.extranet.simpleviewcrm.com>), the home screen will appear with a left-hand sidebar. Hover your mouse to the side bar and click on “Profile.” Additional options will appear. Click on “Accounts.”



2. You will be taken to the “Accounts” page where your business name will be listed. Click on the account you would like to update.

SLO CAL CONNECTION Visit SLO CAL berlin@slocal.com Logout Visit SLO CAL

Account Details

RETURN

Sections:

- [Account Information](#)
- [Phone Information](#)
- [Address Information](#)
- [Image Gallery](#)

Related Details:

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

Account Information

| | |
|-----------------|----------------------------------|
| Account ID | |
| Account | Visit SLO CAL |
| Extranet Parent | |
| Region | San Luis Obispo |
| Email | info@slocal.com |
| Website | www.visitsanluisobispocounty.com |

Phone Information

| | |
|-----------|----------------|
| Primary | (805) 541-8000 |
| Alternate | |
| Toll Free | |
| Fax | |

Address Information

Physical Address

| | |
|-----------------|-----------------|
| Address 1 | 1334 Marsh St |
| City | San Luis Obispo |
| State/Province | CA |
| Zip/Postal Code | 93401 |

Updating your online listing

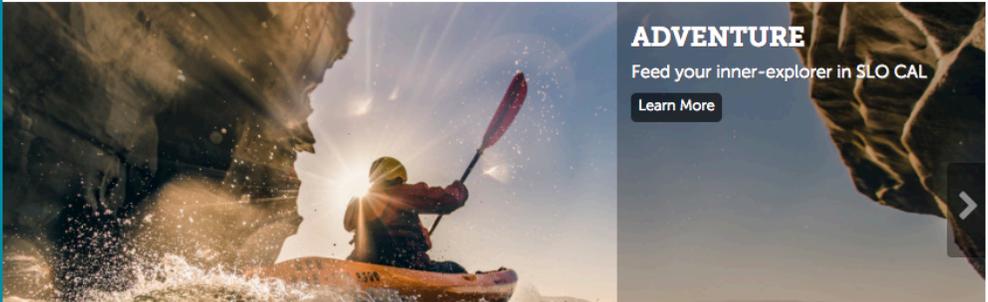
Under “Collateral”, find the “Listings” section, which will include all the current business listings under your account (tip: if you want to manage more than one listing, let the Visit SLO CAL team know so we can add you as a manager of additional listings).

SLO CAL CONNECTION Visit SLO CAL

Collateral
Manage your Collateral

- Listings
- Special Offers
- Calendar of Events
- Media

ADVENTURE
Feed your inner-explorer in SLO CAL
[Learn More](#)





Select the pencil icon to edit your listing information:



The first section will contain your business description. Make sure it's accurate and it follows our content guidelines.

Update Listing

SAVE

CANCEL

Sections:

- Listing Information
- Categories
- Details
- Website Notifications
- Listing Image

Listing Information

Account: Required

Visit SLO CAL

Contacts:

Kylee Jepsen

Description:

Located halfway between San Francisco and Los Angeles along California | Our inland communities experience the greatest temperature swings betw around. The unique microclimates make the area diverse, yet the perfect g variety of produce growing throughout the region. A wide array of farm stc to play connecting you to the region | 01 04 2018 agricultural roots.

Here are our best practices to write an appropriate business description:

1. Please refrain of using the first person to write about your business, instead describe your business as an outside observer would, like a journalist or magazine editor. Example:

- “We are a boutique hotel located in Paso Robles established in 1989 “ **WRONG**
- “[BUSINESS NAME] is a boutique hotel located in Paso Robles established in 1989“ **GOOD**

2. Include your business name in the first sentence of your description.

3. The recommended minimum length is 150 words, but you can provide more information (up to 500 words) as long as it is original content and NOT a direct copy from your website or any other online listing.

4. Make sure the information is useful, relevant and precise, helping users have a better understanding of your business and the goods/services you offer.

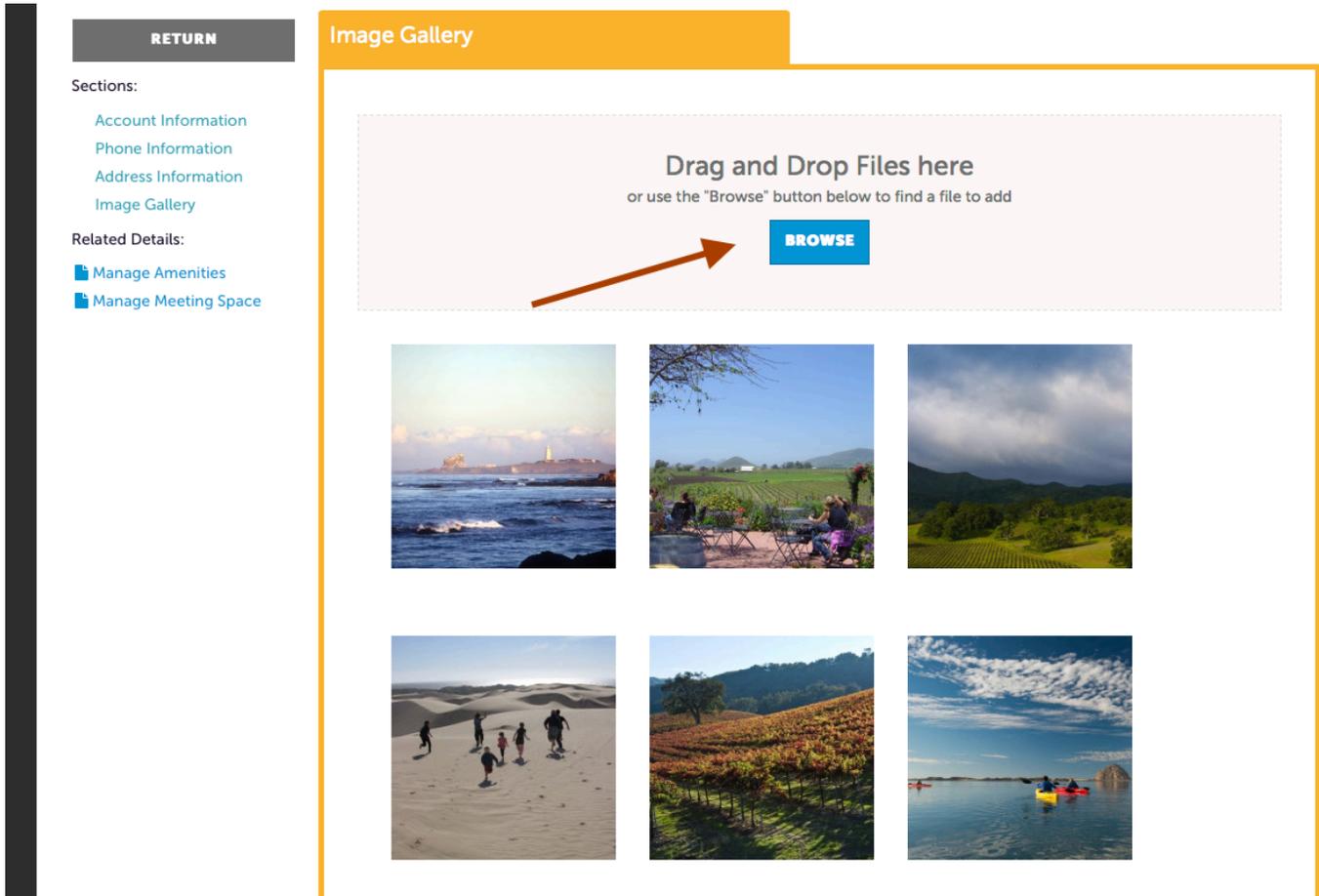
Upload images

Having an up to date image gallery is a great asset for your company. With SLO CAL Connect you may upload photos and decide which ones you want active on our site and leave the rest stored in your account.

1. Begin in the “Account Details” page (see steps above).



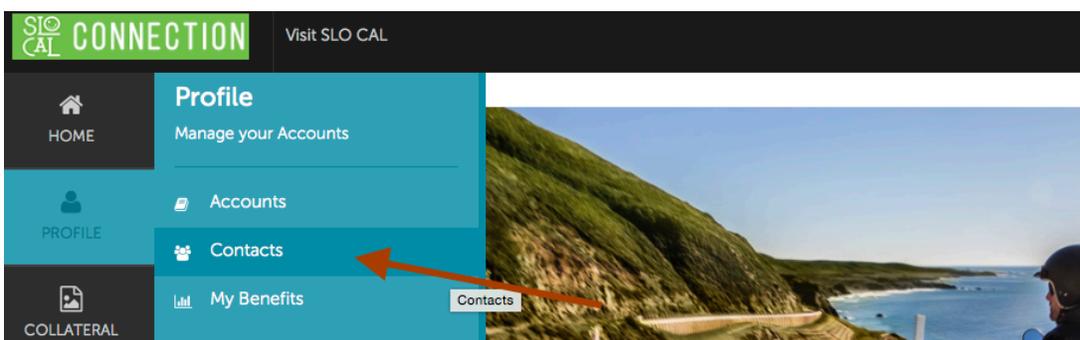
2. Scroll to the bottom of the page, and under the “Address Information” you will find “Image Gallery” (See Below). Click on “Browse” and begin uploading your images!



Adding another user

If you are the primary user of the account, you have the ability to add more contacts. These contacts can then log into SLO CAL Connection and respond to opportunities, upload images, and view reports.

1. After logging in, the home screen will appear with a left-hand sidebar. Hover your mouse to the side bar and click on “Profile.” Additional options will appear. Click on “Contacts.”





2. The “Contacts” page allows you to view and manage all contacts. To add a new contact, click “Add Contact.”

Contacts

Filters (0) [Manage Filters](#)

Account is one of: Contact Type is one of:

Page 1 of 1 Go to Page:

| Actions | Full Name | Account | Title | Email | Contact Type |
|---|---------------------|---------------|--------------------------------|---------------------|--------------|
| <input type="button" value="edit"/> <input type="button" value="eye"/> <input type="button" value="share"/> | Berlin Lopez | Visit SLO CAL | | berlin@slocal.com | Primary |
| <input type="button" value="edit"/> <input type="button" value="eye"/> <input type="button" value="share"/> | Chuck Davison | Visit SLO CAL | Chief Executive Officer | chuck@slocal.com | Primary |
| <input type="button" value="edit"/> <input type="button" value="eye"/> <input type="button" value="share"/> | Jordan Carson | Visit SLO CAL | Marketing Coordinator | jordan@slocal.com | Secondary |
| <input type="button" value="edit"/> <input type="button" value="eye"/> <input type="button" value="share"/> | Kimberly Headington | Visit SLO CAL | Executive assistant to the CEO | kimberly@slocal.com | Primary |

3. Fill out the required fields under “Contact Information”. Make sure the email is correct, as this is where login details will be sent to your contact.

New Contact

Sections:
[Contact Information](#)
[Address Information](#)
[Phone Information](#)
[Additional Information](#)

Contact Information

Account: Required

First Name: Required

Last Name: Required

Full Name: Required

Department:

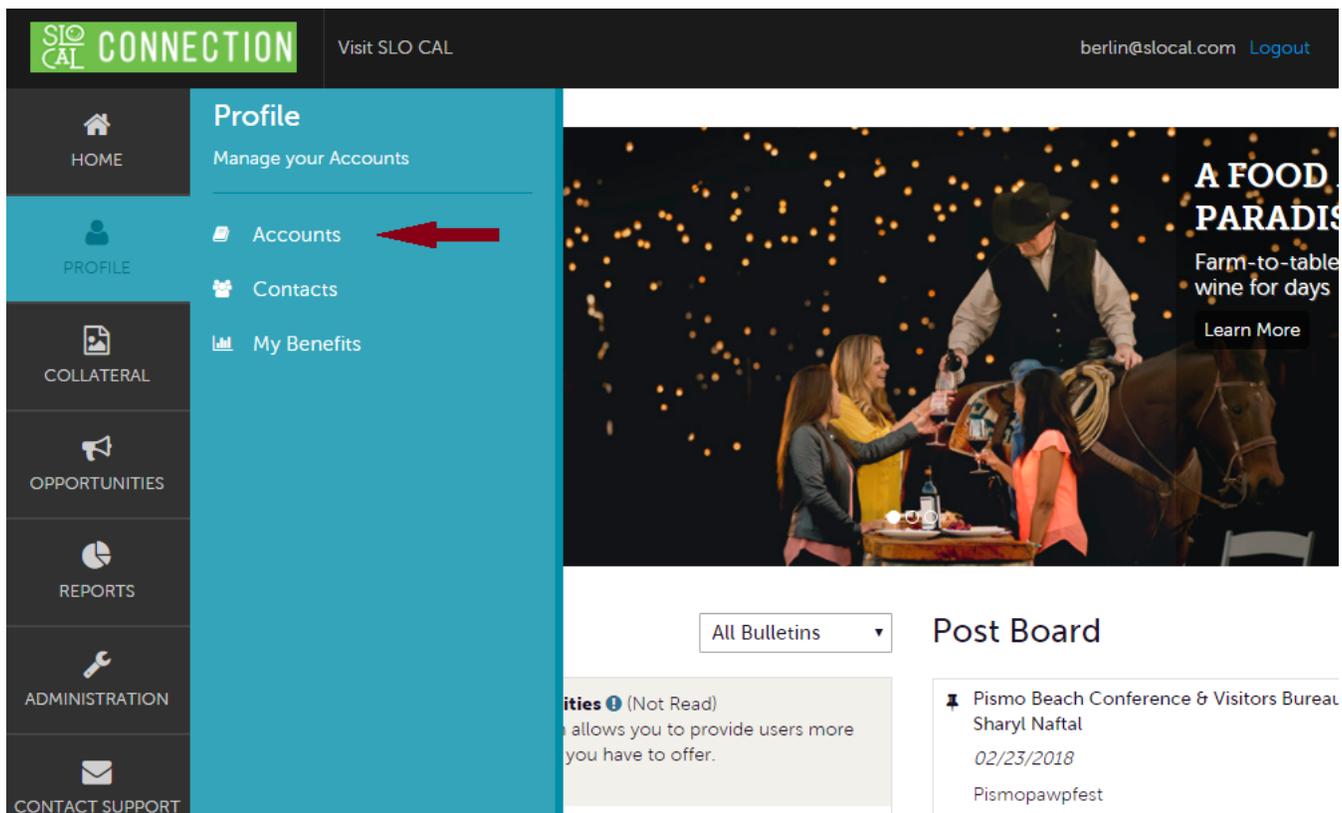
Title:

Contact Type: Required

Preferred Contact Method:

4. Don't forget to click "Save" before exiting. Your new contact will then receive an email with instructions to create an account.

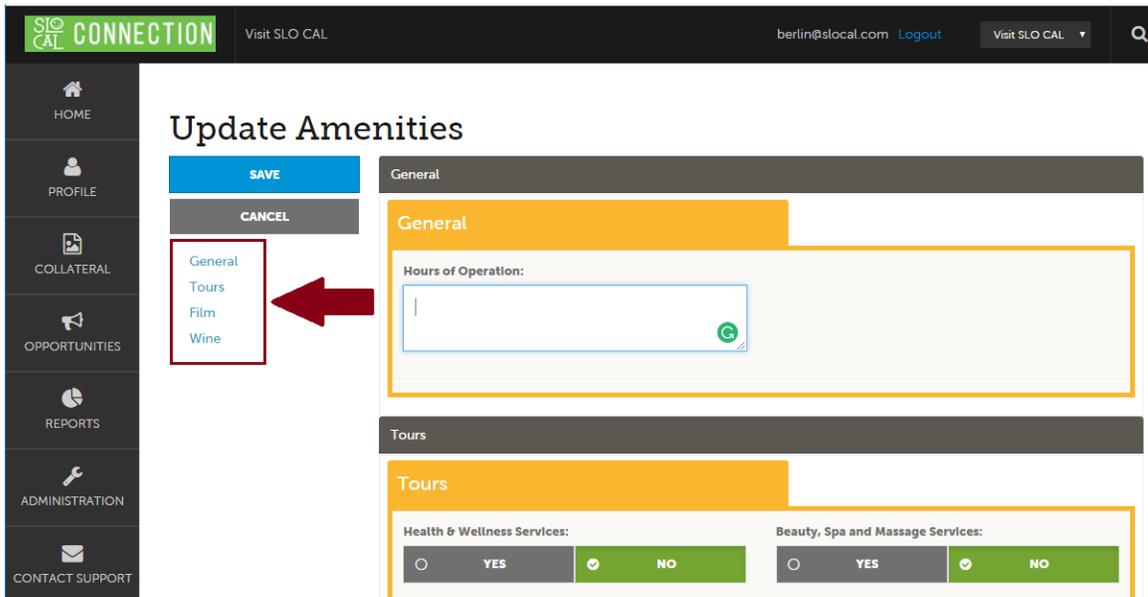
Update Business Amenities



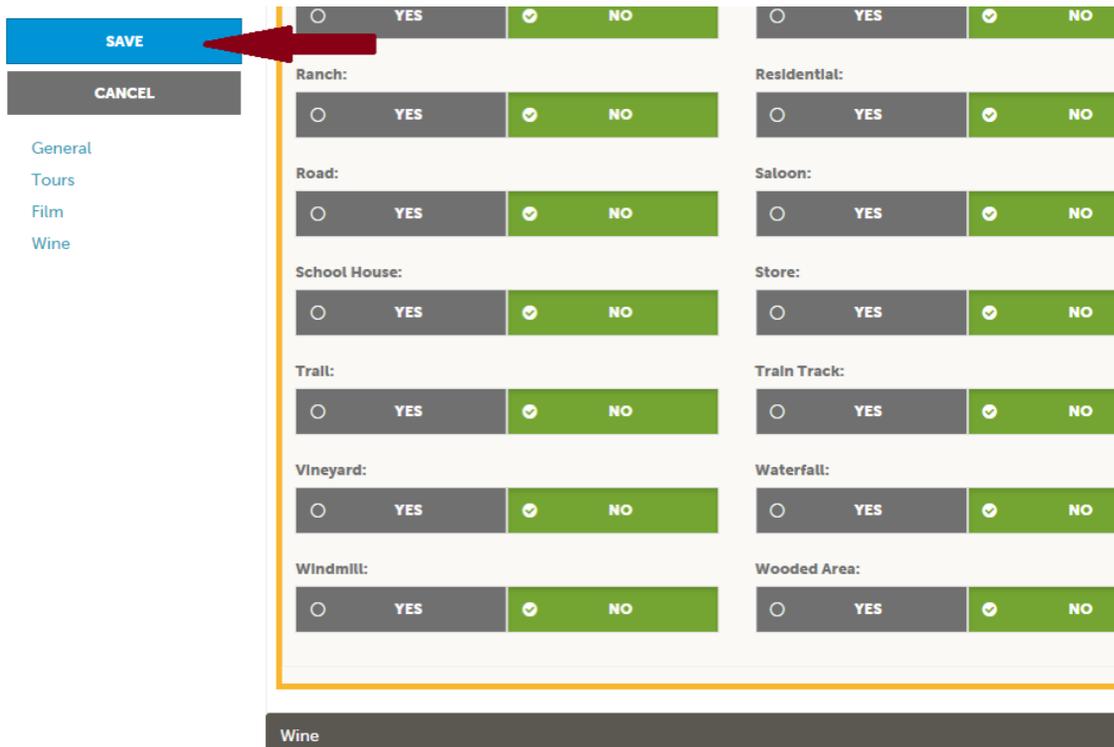
1. Log in to your SLO CAL Connection Portal
2. Hover to vertical menu on the left-hand side
3. Click on **Profile**
4. Click on **Accounts**
5. Under **Actions**, click on the drop-down menu next to the eye icon.
6. Click on **Manage Amenities**

The screenshot displays the 'SLO CAL CONNECTION' web application interface. The top navigation bar includes the 'SLO CAL CONNECTION' logo, the text 'Visit SLO CAL', and the email address 'berlin@slocal.com'. A dark sidebar on the left contains navigation icons for HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, ADMINISTRATION, and CONTACT SUPPORT. The main content area is titled 'Accounts' and features a filter section with 'Filters (0)', a 'Status is one of:' dropdown menu (currently set to 'CHOOSE'), and an 'APPLY FILTERS' button. Below the filter section is a table with two columns: 'Actions' and 'Account'. The 'Account' column contains a row for 'Visit SLO CAL'. A dropdown menu is open for this row, showing 'Manage Amenities' and 'Manage Meeting Space'. A red arrow points to the 'Manage Amenities' option.

7. Scroll down the different categories and select your amenities for each section (the amenities categories will depend on your business category).



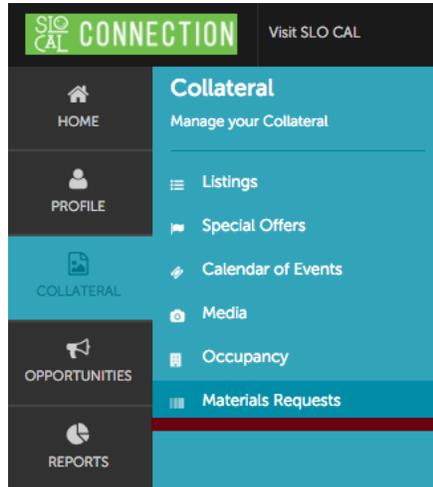
8. After you have selected all the amenities in all the yellow sections, click on the blue “Save” button.



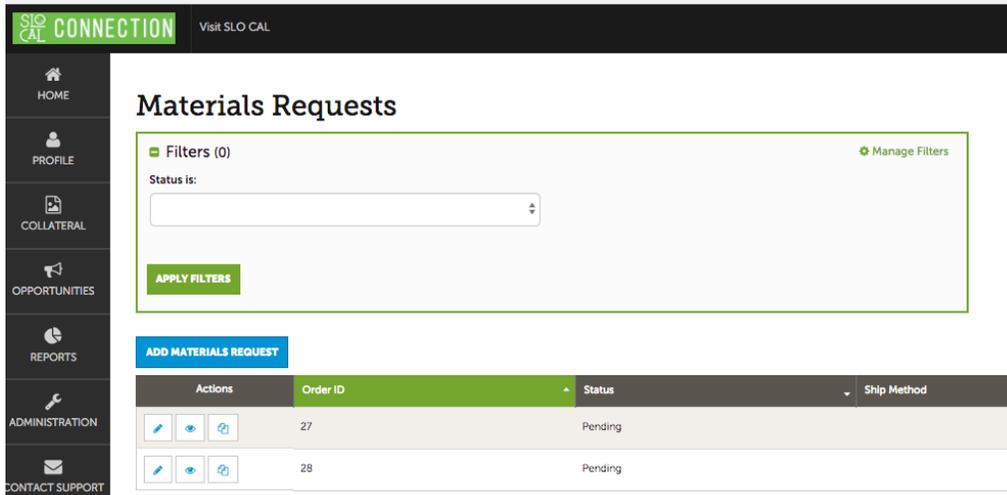


Requesting Visitor's Magazine

1. Go to Collateral > Materials Requests



2. You will see a list of your previous requests. To add your first Visitor's Magazine request, click on "ADD MATERIALS REQUEST".



3. Add any Special Instructions for your delivery

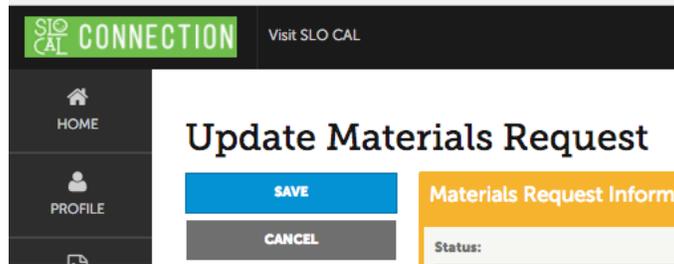


4. Under “Order Address”, make sure the address is the one you want your magazines to be delivered

5. Under “Order Details” > Qty add the number of Visitor’s Magazines you want to order. The minimum order quantity for delivery is 50 units.

| Image | Product | Price | Qty |
|-------|-------------------------------|--------|-----|
| | 2018 SLO CAL Visitor Magazine | \$0.00 | 199 |

6. Go to the top of the screen and hit “Save”



How to opt-out of CRM emails

If you do not wish to receive media leads, RFPs or any other business opportunity from Visit SLO CAL, you can choose opt-out of all SLO CAL Connection emails by going to **Profile>Contacts>Edit Contact** and selecting “No” under “Send Email”.

