SLO CAL CONNECTION

A User Guide for Maximizing Your Partnership with Visit SLO CAL

Thank you for choosing to become a partner with Visit SLO CAL.

Accessing SLO CAL Connection, our partner extranet site, is the first step to maximizing our partnership.

SLO CAL Connection is your tool to manage your account, business amenities, website business listings, events, respond to RFP's from our sales team and more. You'll even have access to VSC research and reports, order Visitor's Magazines, share your press releases & communicate with peers through the Post Board.

Click **HERE** to access the SLO CAL Connection basic navigation training video.
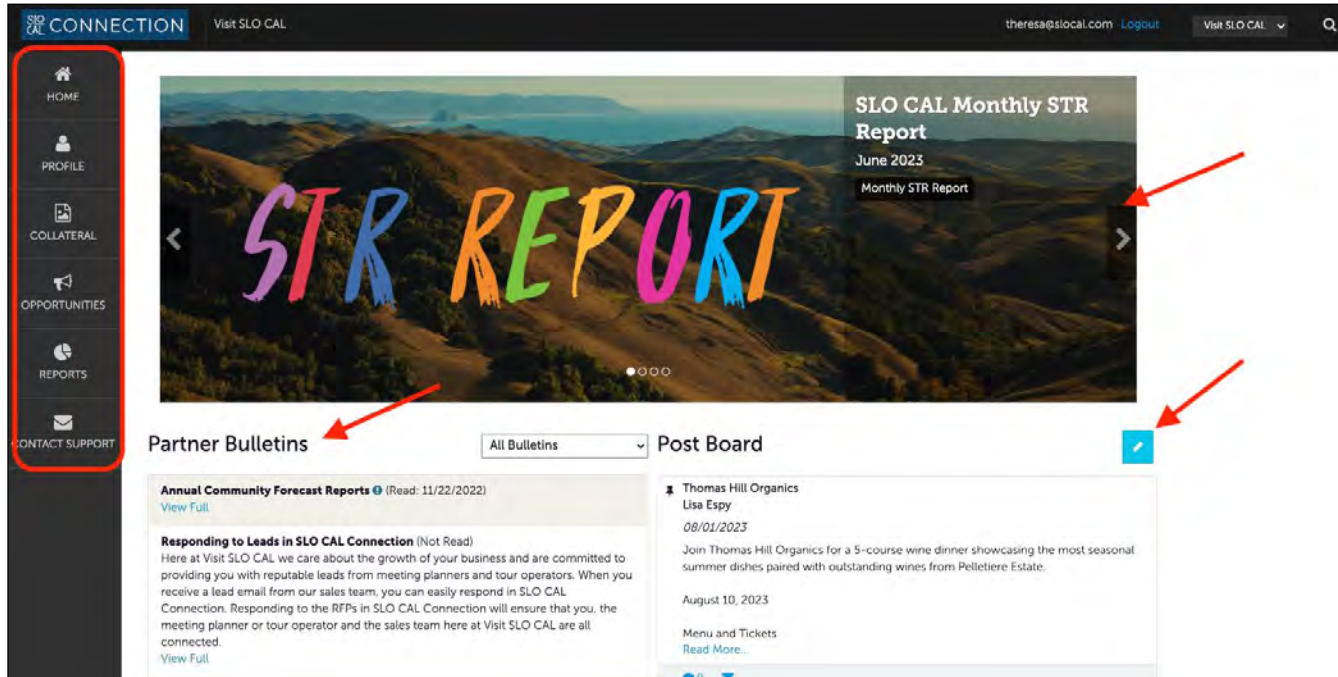
Post Board allows a user to communicate with other properties and businesses.

Clicking on the caption bubble icon allows a user to reply to a post.

There is also an email icon for contacting the poster via email.

Partner Bulletins are important notices, documentation, events, etc. posted by the Visit SLO CAL.

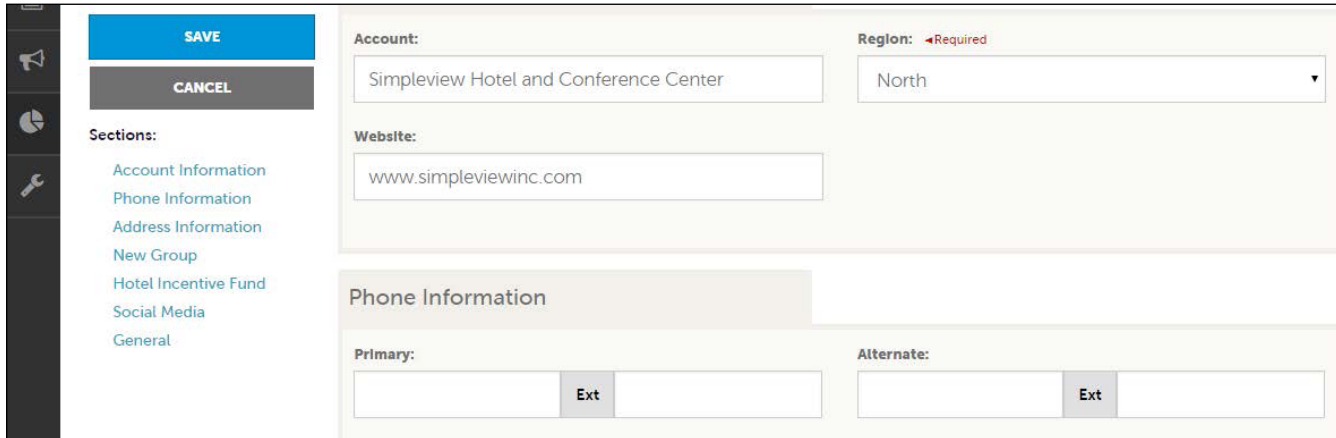Important bulletins will be marked with a blue and white exclamation mark.

Featured Partner Bulletins are located in the top image bar.

Main Menu account tools are on the left-hand side of the screen.
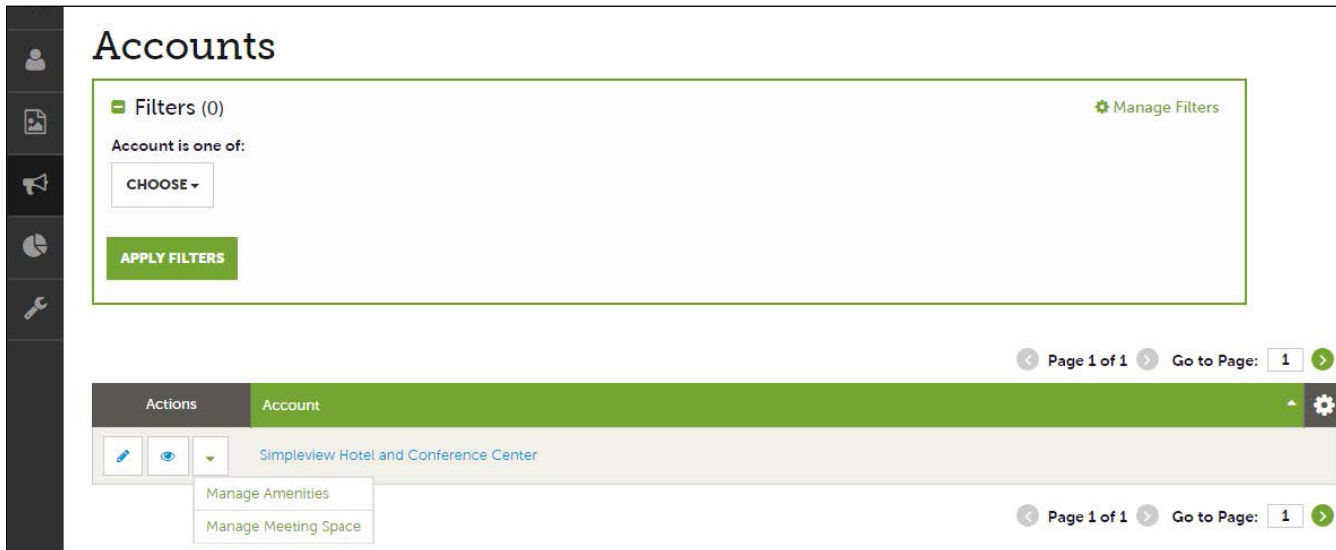
Keeping your account information up-to-date will ensure that the correct information is displayed on SLOCAL.com

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 account being associated with another account. The pencil icon will allow you to edit your account information. By clicking the eyeball icon, you can view your account information. The down arrow icon will allow you to view and edit your amenity and meeting space information.

PRO TIP: Remember to add your social media links in the "Social Media" section.

When you view or edit your account 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!

Keeping your business amenities up to date is not only an important resource for consumers but informs the staff at VSC for RFP's, Media FAM's and more. From your account page select Manage Amenities. Scroll down the different categories and select your amenities for each section (the amenities categories will depend on your business category). After editing, you must click the Save button before changes are applied!

PRO TIP: Add as many meeting rooms as you have by clicking the NEW ROOM icon at the bottom of the "Facility Details" page and adding floor plans can give meeting planners a better idea on where to host their next meeting or event.

From your account page select Manage Meeting Space. Select edit on the Facility Details page and on the the Update Facility page, enter or edit your property or business meeting room details. You must click the Save button before changes are applied!
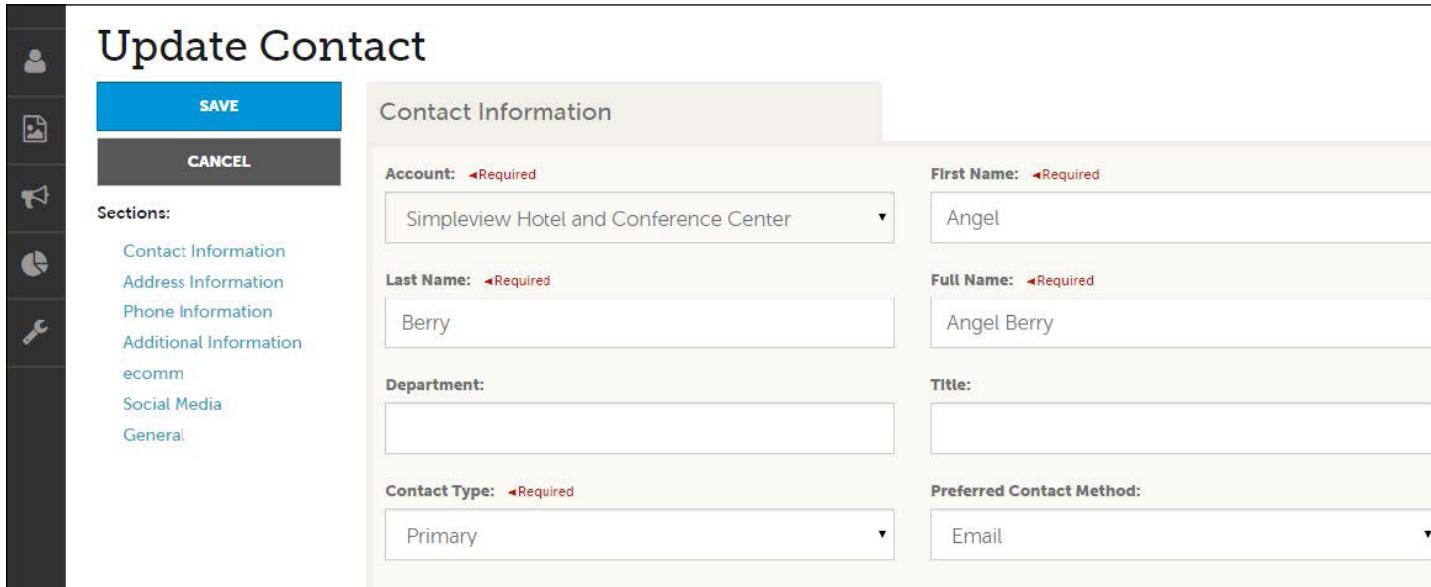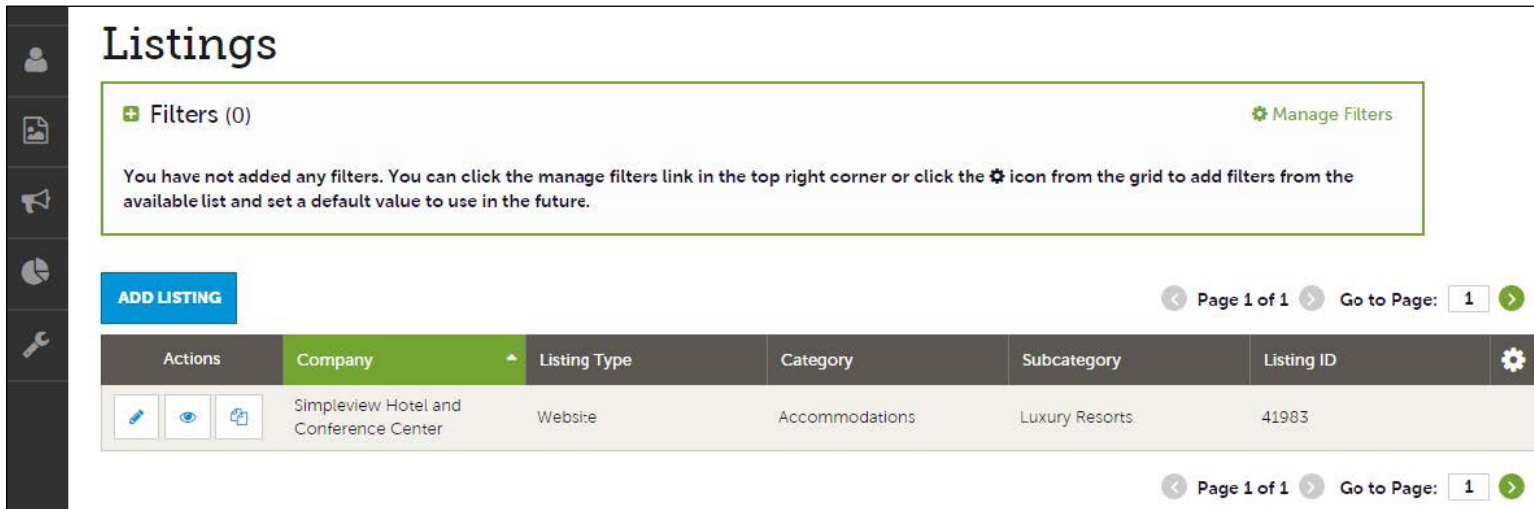
After you click the Profile icon and then Contacts, you will be presented with a list of all the contacts associated with your account. On this page you can Add, Edit, View, or Clone (i.e. duplicate) a contact depending upon your extranet permissions.

PRO TIP: Selecting "NO" for Send Email will automatically opt you out of receiving sales leads and other important communication from Visit SLO CAL.

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!

All new contacts require up to 24-48 business hours for granting access to SLO CAL Connection. If a contact has left your property or business, it is your responsibility to notify Visit SLO CAL or change their contact type to "Inactive".
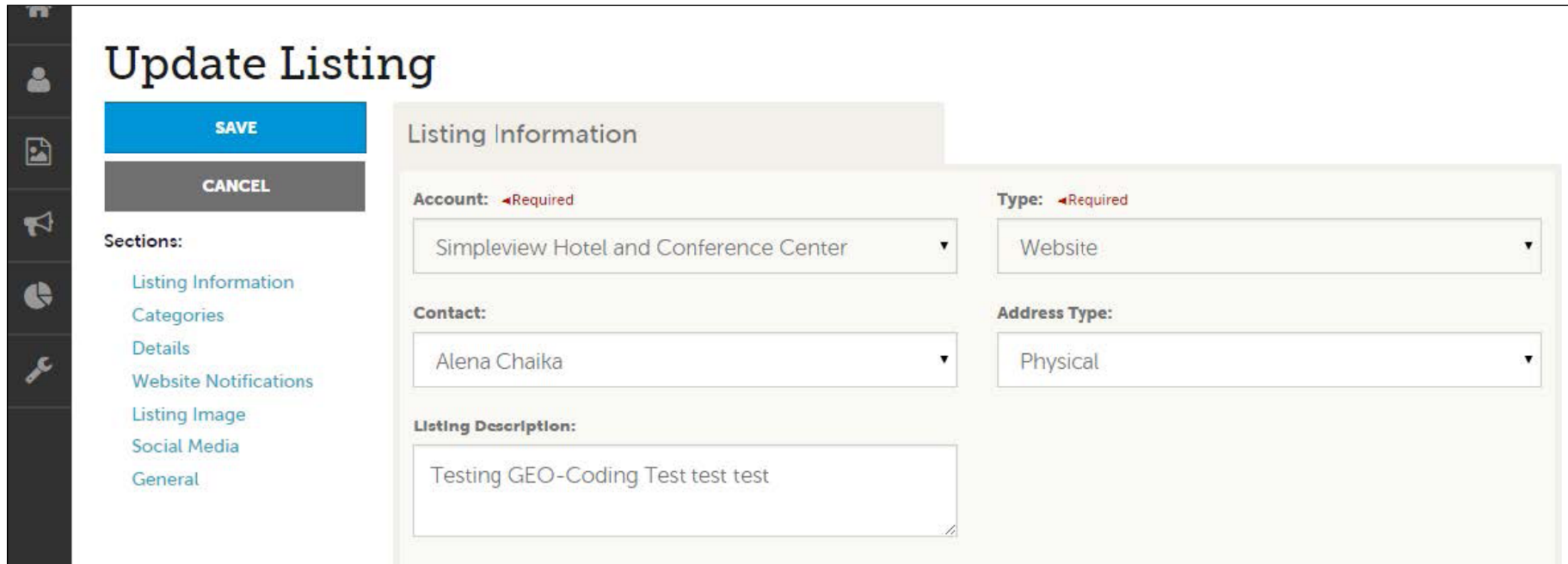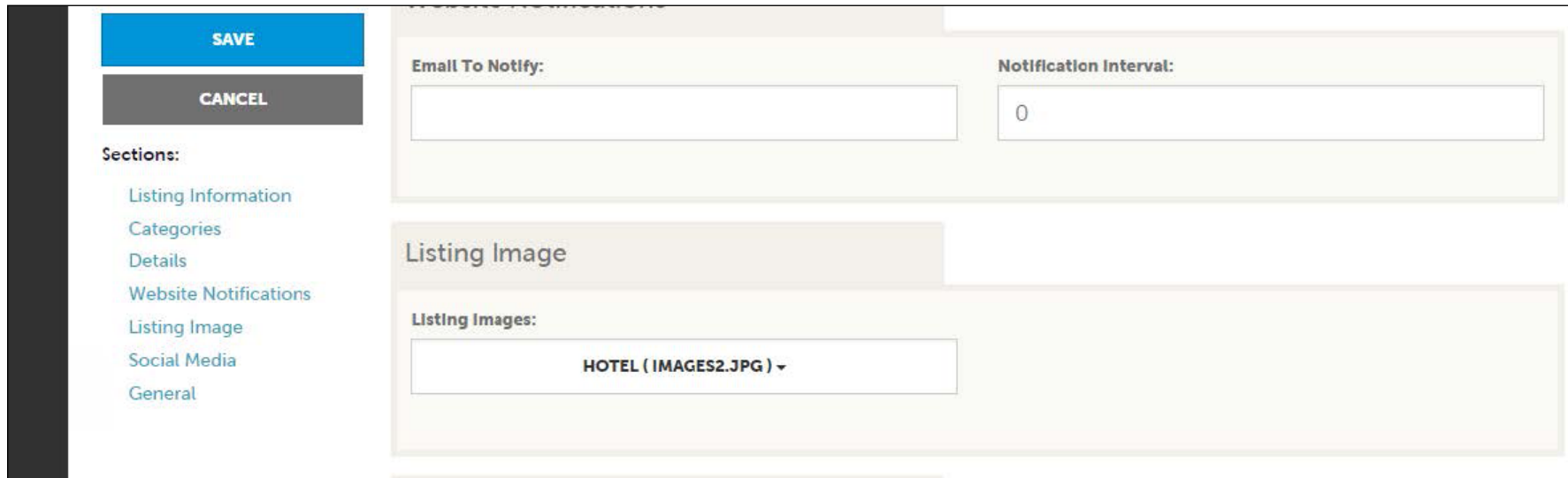
Your business listing is the best way to reach locals and travelers alike who visit SLOCAL.com, so it is important to create your listing as soon as possible.

Your listing will include the amenities you added to your account as well as other account information. **If you are a business owner with several locations that are managed separately, have separate social media accounts and different amenities, additional accounts will need to be created, please reach out to Info@SLOCAL.com.** After you click the Collateral icon and then Listings, you will be presented with your account's 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.

When you view, edit, or add 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.

Any edits or adding of listings will require approval from Visit SLO CAL. All new listings require up to 24-48 business hours for approval before displaying on SLOCAL.com.

When you edit or add a listing, you can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu.

Listing Guidelines: Include the name of your business in the first line of your description text. Please refrain of using the first person to write about your business, describe your business as an outside observer would, like a journalist or magazine editor.

We are a boutique hotel located in Paso Robles established in 1989. **(Incorrect)**
[Business Name] is a locally owned boutique hotel located in Paso Robles established in 1989. **(Correct)**

Do not use superlatives, incorrect information, brands or business names other than your own, inappropriate language, special characters, HTML or any other format than plain text.
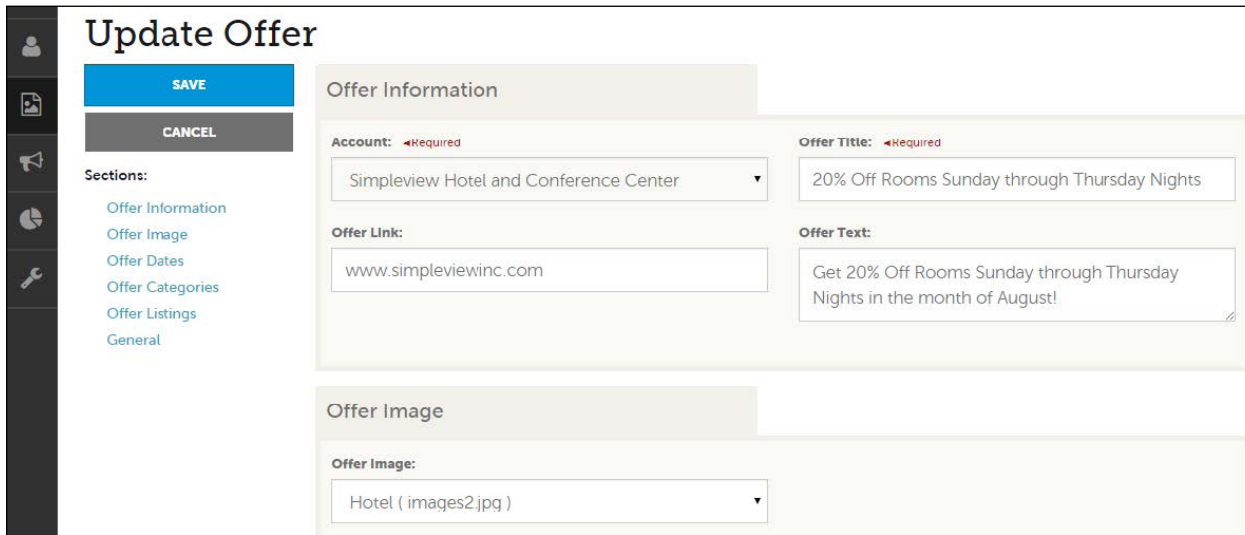
After you click the Collateral icon and then Special Offers, you will be presented with your account's offers. The pencil icon will allow you to edit an existing offer. By clicking the eyeball icon, you can view the existing offer. The clone icon will allow you to duplicate an offer. You can also create a new offer by clicking the Add Offer button.

PRO TIP: In the Offer Link section include a link to a place or page on your website that provides additional details, fine print or the ability to book the Special Offer.

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. Any edits or adding of listings will require approval from Visit SLO CAL. All new offers require up to 24–48 business hours for approval before displaying on SLOCAL.com

The promotion title must be descriptive of the offer and state the percentage discount, dollar amount discount or value of the deal (155 character limit). It is recommended to include your business name if possible.

Offer Guidelines: $30 Off Relaxing Massage at Acme Massage Co, Get 25% Off Any Sandwich at Acme Cafe, 2 for 1 on Hero Cookies at Acme Cookie Factory, Buy 1, Get 1 Free Magic Wands at Acme Magic Store. The offed details must specify any conditions and restrictions applicable to the promotion, including number of times it can be used, time limits and any other reason why a customer may not be able to claim the special offer.

Events

Travelers and locals alike enjoy all type of events and the best way to increase attendance is to publish your events on SLOCAL.com.

After you click the Collateral icon and then Calendar of Events, you will be presented with your account'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.

Update Event

SAVE

CANCEL

Sections:

Event Information
Event Location
Event Dates
Image Gallery
General

Event Information

Account: ◄Required

Simpleview Hotel and Conference Center ▾

Featured:

✓ YES | ○ NO

Admission:

Email:

Website:

Title: ◄Required

Simpleview Festival

Contact:

Shawn Wilkins ▾

Description:

<p>This is the Simpelview Festival event description. <span>This is the Simpelview

Priority: ◄Required

Platinum ▾

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!

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.
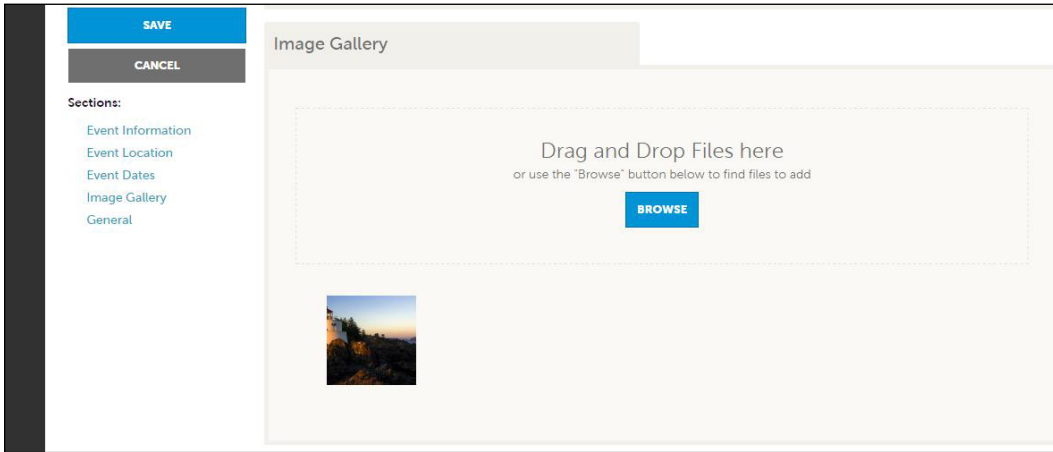
PRO TIP: Images tell the story, load up to 5 images for an event and if there is a special menu, don't forget to add a PDF of the menu as well.

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.

Any edits or adding of events will require approval from Visit SLO CAL. All new events require up to 24-48 business hours for approval before displaying on SLOCAL.com

Event Guidelines: Events being submitted must be open to the public, take place in San Luis Obispo County and be of interest to tourists and/or expand tourism. Event descriptions should follow the same guidelines as listings.

Event Images: Only submit images that you have express permission or rights to use for this purpose. Preferred image size is 800 x 500 pixels. Event images must be descriptive of the event or host organization, help the user get a better idea about the event and be text-free. Please refrain from using fliers.
Visit SLO CAL reserves the right to refuse inclusion of any event that does not align with the above SLO CAL guidelines.
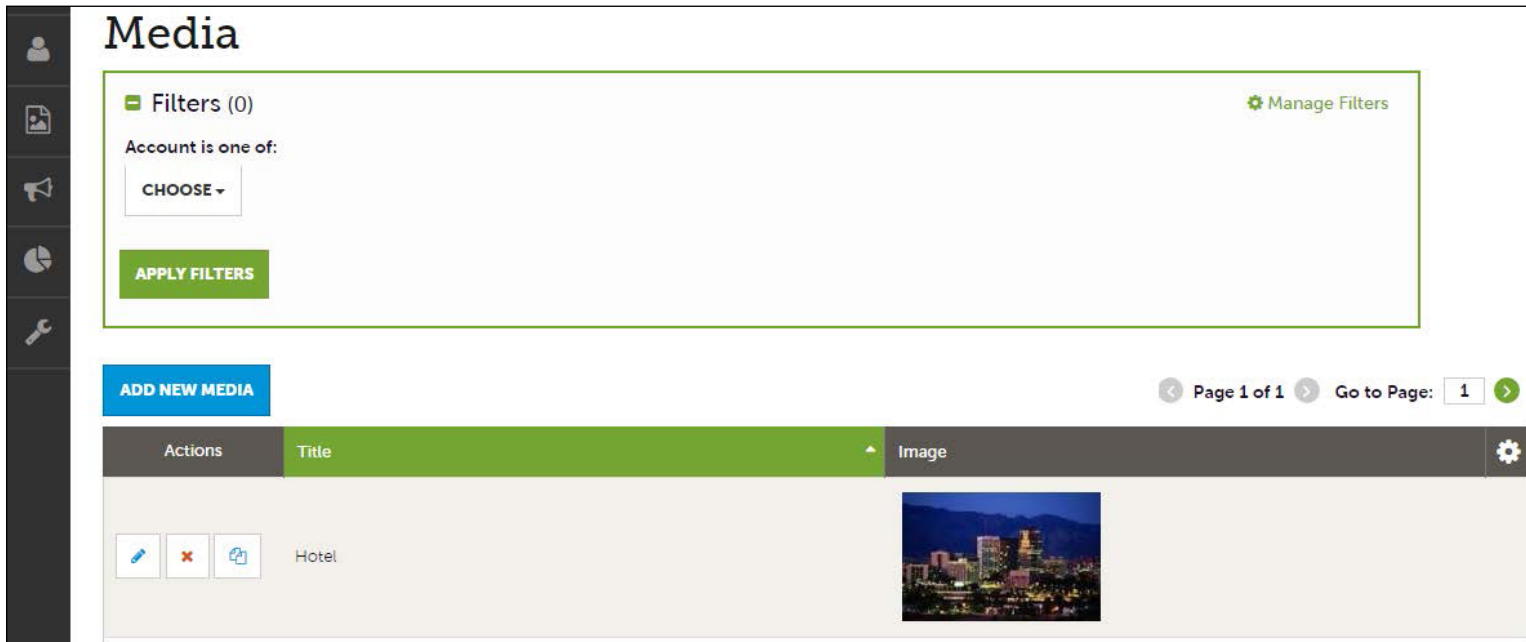
Having an up-to-date image gallery is a great asset to promote your business. SLO CAL Connection can host several images to display on and your listings, events and special offers, each telling your unique story.

After you click the Collateral icon and then Media, you will be presented with your account'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. You can also add a new image by clicking the Add New Media button.
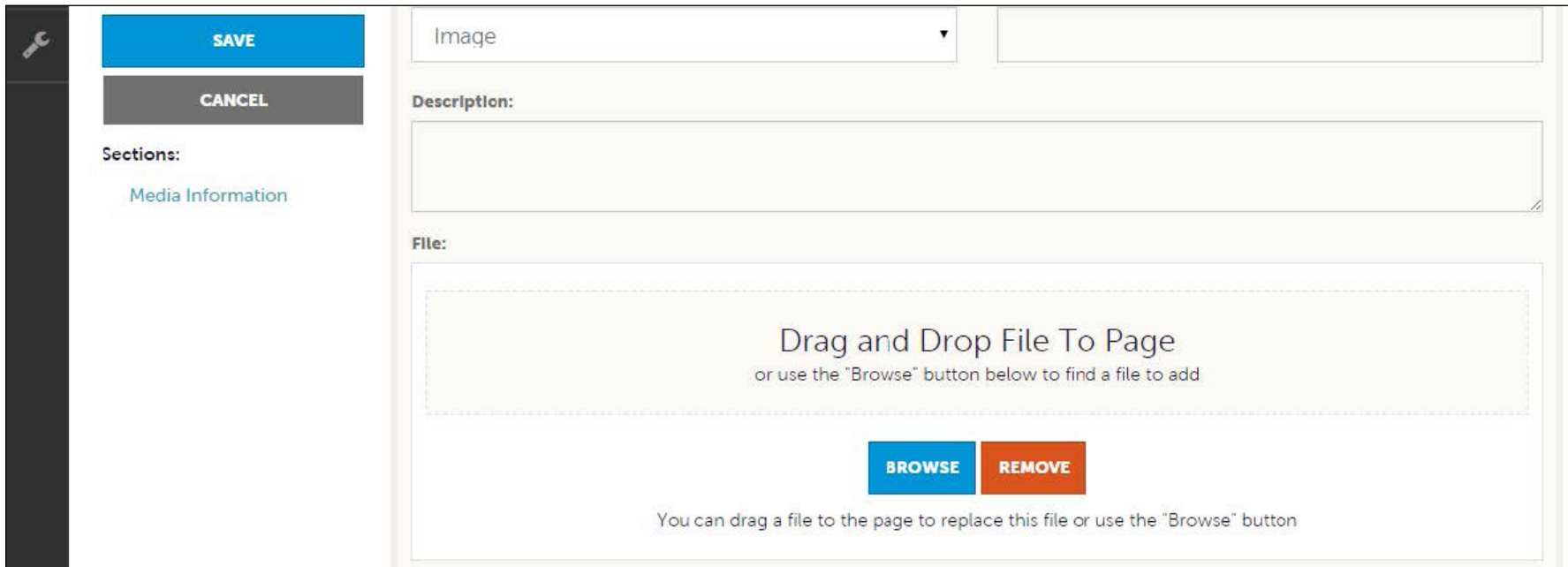
As with Calendar of Events you can browse your hard drive or drag and drop an image. Once you upload a new image or edit an existing one you can attach the image to one or multiple listings by selecting the Listings pull down menu.

Image Guidelines: The ideal image size is 800 x 500 pixels (width x height). The preferred image format is JPG. You are encouraged to compress your images before uploading them to our website to improve the load speed of your listing page and to upload them faster. Listing images must be text-free. Only submit photos or images that you have express permission or rights to use for this purpose. By uploading an image, you certify that you have use rights for the image(s) and that you authorize Visit SLO CAL to display it on this website.

Each year, Visit SLO CAL produces a high-quality visitor's magazine that many businesses display for their customers and on SLO CAL Connection you can order magazines in bundles of 60 to be hand delivered to your business.

After you click the Collateral icon and then Materials Request, you will be presented with a list of orders you have submitted to Visit SLO CAL. This feature will allow you to request Visitor's Magazines. 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.
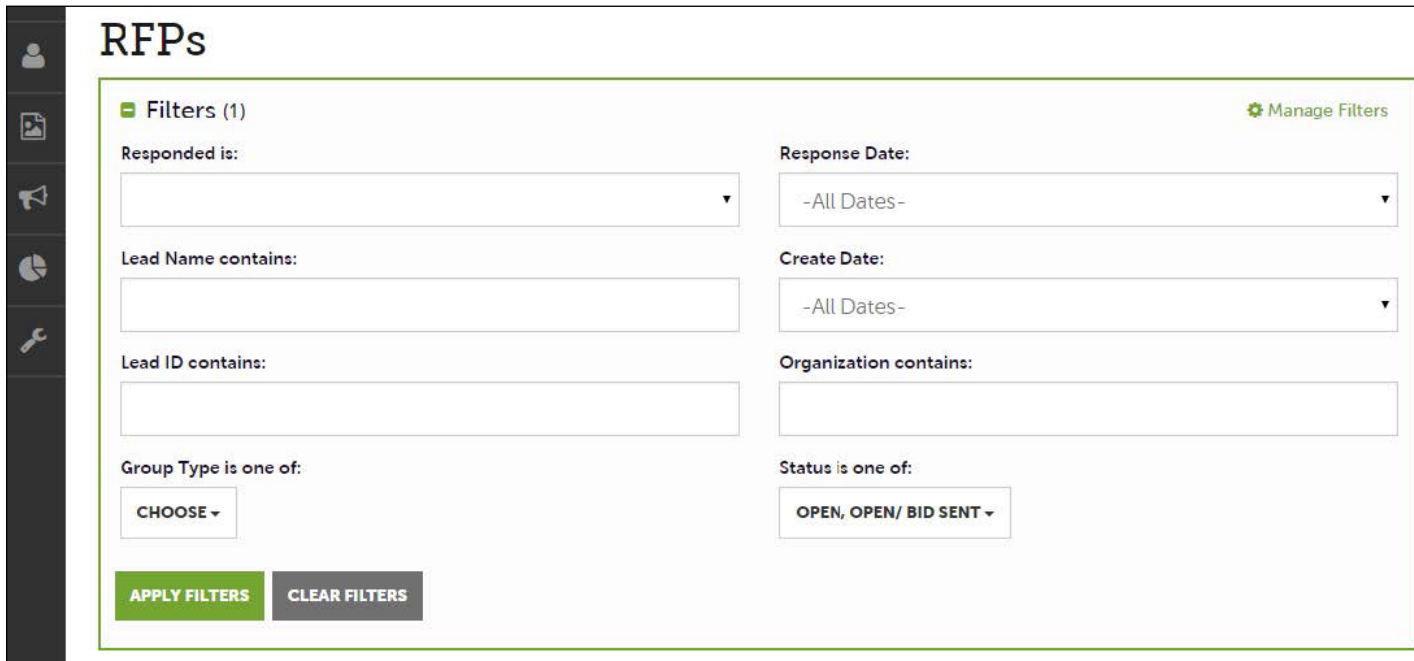
Upon editing or creating a new request, you will be presented with an order form. Within the order form there is an Order Detail section where you can select from available inventory, just enter the quantity of each product you are requesting. You will not be able to order more of a product than is in the Available column. Upon clicking the Save button, Visit SLO CAL will be notified of your request.

When you receive a lead email from Visit SLO CAL, you can easily respond in SLO CAL Connection. Responding to the RFPs in SLO CAL Connection will ensure that you, the meeting planner or tour operator and the sales team here at Visit SLO CAL are all connected.

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. For more on Lead statuses and their definitions see the next slide.

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.

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.

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. For the Notes section, see next slide.

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.

When adding/editing your response, you will need to tell Visit SLO CAL if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option.

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.

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. Your response will automatically be emailed to the planner and Visit SLO CAL will be notified of your response.

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: **Property Lead Status is one of:**
[CHOOSE ▾]   [3 SELECTED ▾]

[APPLY FILTERS] [CLEAR FILTERS]

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

Once your account has won the business from a lead, advise Visit SLO CAL and your account will be updated. After the meeting or event has taken place, advise Visit SLO CAL of the Room Pickup on the RFP page. This data can only be added to RFPs that your Property has won and if Visit SLO CAL has identified you as a Pickup Manager.

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.

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.

RETURN

Sections:

Additional Lead
Information

Lead Information

Meeting Dates

Room Summary

History/Futures

Notes

Responses

Room Data

Signage

General

Lead ID	10058
Meeting Name	Karate for Kids Meeting 2015
Account	Hilton by the Shore
Profile	Karate Affiliation
Organization	Karate for Kids
Organization Address	4956 N Park Ln Bonham TX 75418
Contact	Rita 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 difference 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.

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.

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.

REPORTS

Reports

Annual Reports

Cambria Annual Community Forecast Report
Paso Robles Annual Community Forecast Report
County of San Luis Obispo Annual Community Forecast Report
City of San Luis Obispo Annual Community Forecast Report
Pismo Beach Annual Community Forecast Report
Atascadero Annual Community Forecast Report
Morro Bay Annual Community Forecast Report

Monthly Reports

Quarterly Visitation Report
    Access the latest quarterly visitation report based on the calendar year
Wine Industry Community Benchmark
TOT By Segment Report
San Luis Obispo County | Community Business Intelligence Report
Atascadero | Community Business Intelligence Report
Five Cities | Community Business Intelligence Report
Morro Bay | Community Business Intelligence Report
North Coast | Community Business Intelligence Report
Paso Robles | Community Business Intelligence Report
Pismo Beach | Community Business Intelligence Report
City of San Luis Obispo | Community Business Intelligence Report

STR Reports

Weekly STR Report
    For the most up to date information, please make sure you are receiving This Week In SLO CAL email that is sent out on Thursday each week. If you are interested in reporting to STR, please send your information to Sales@SLOCAL.com
Past Week STR Report
    Missed a week, check here for the past week's STR data
September 2023 | SLO CAL Monthly STR Report

On the Home page of SLO CAL Connection, you can access various reports that Visit SLO CAL publishes by clicking the Reports icon, displays reports the Visit SLO CAL has posted. To view a report just click the name of the report. You can also download the reports. Reports include weekly and monthly Smith Travel Research (STR) reports for the lodging community, Community Business Intelligence Reports for eight regions of the county and have STR, TOT and visitor information. Visit SLO CAL also publishes a monthly winery report and quarterly visitation reports. All the reports will provide insight to the current state of travel.

We are here to assist you.

Please contact us with any questions or other inquiries.

SLO CAL Connection: Info@SLOCAL.com

General Partnership: Partnership@SLOCAL.com

RFP and Lead Process: Sales@SLOCAL.com