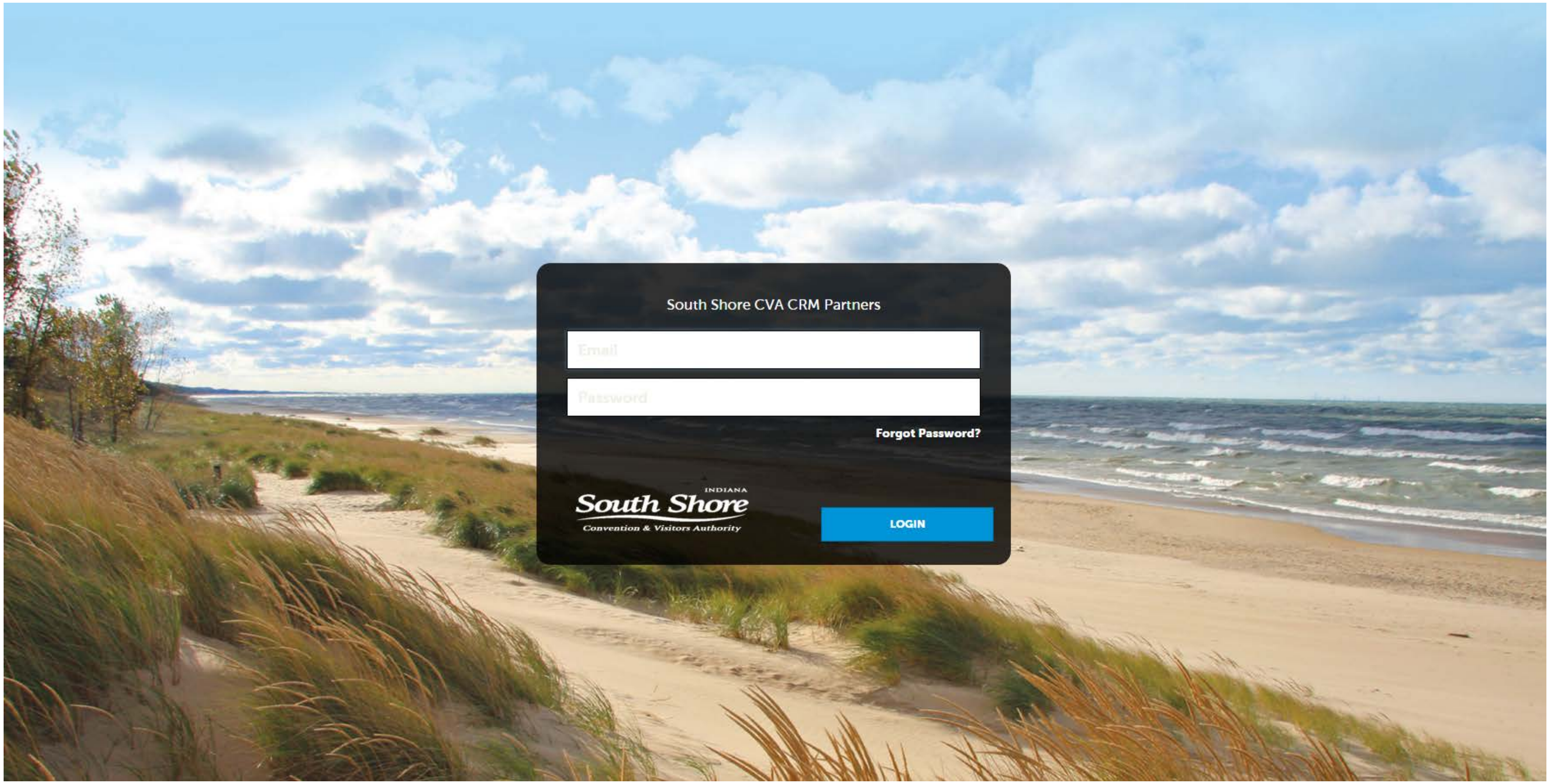
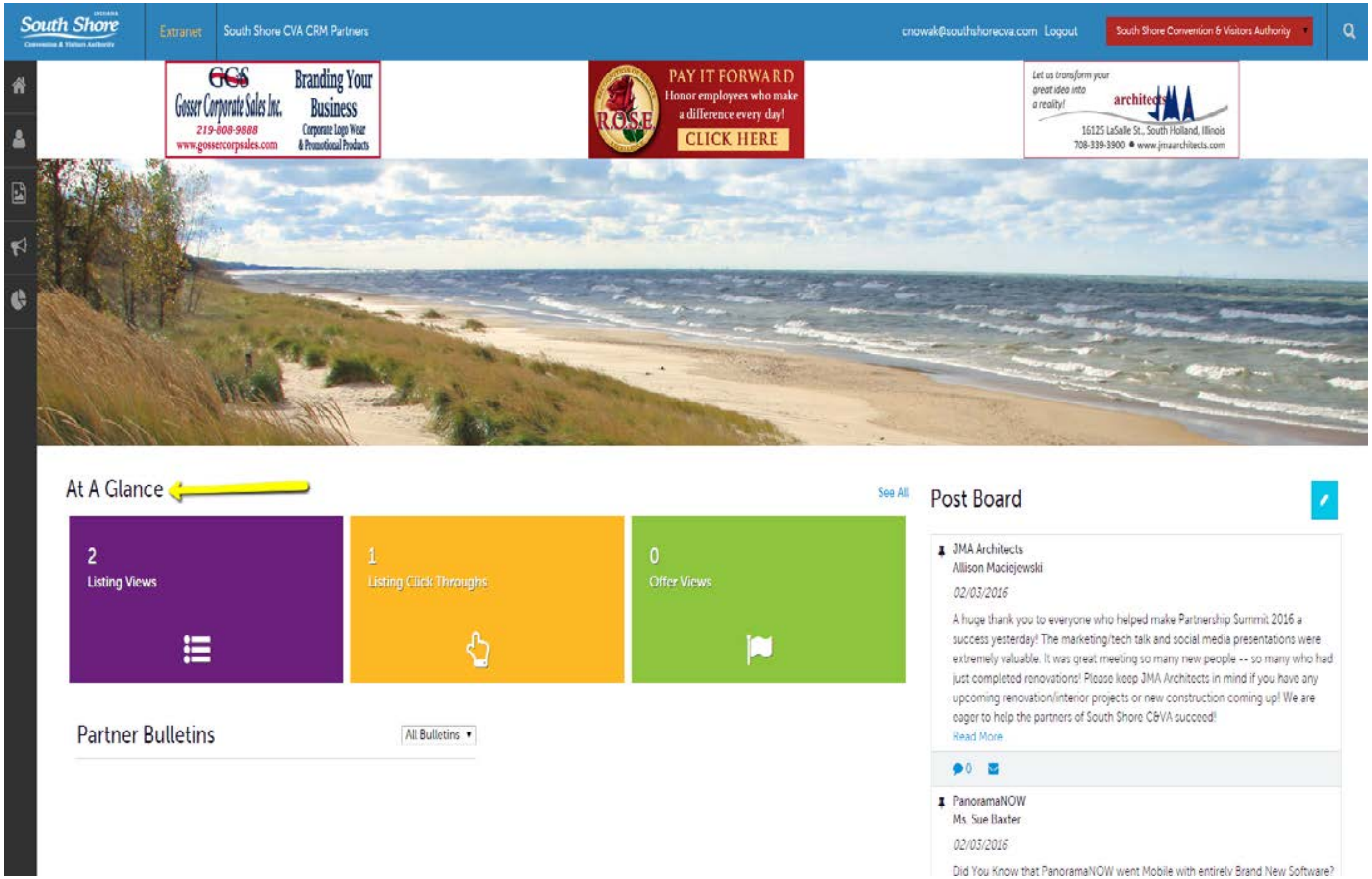
Partner Portal 4.0
User Instructions

Login Screen

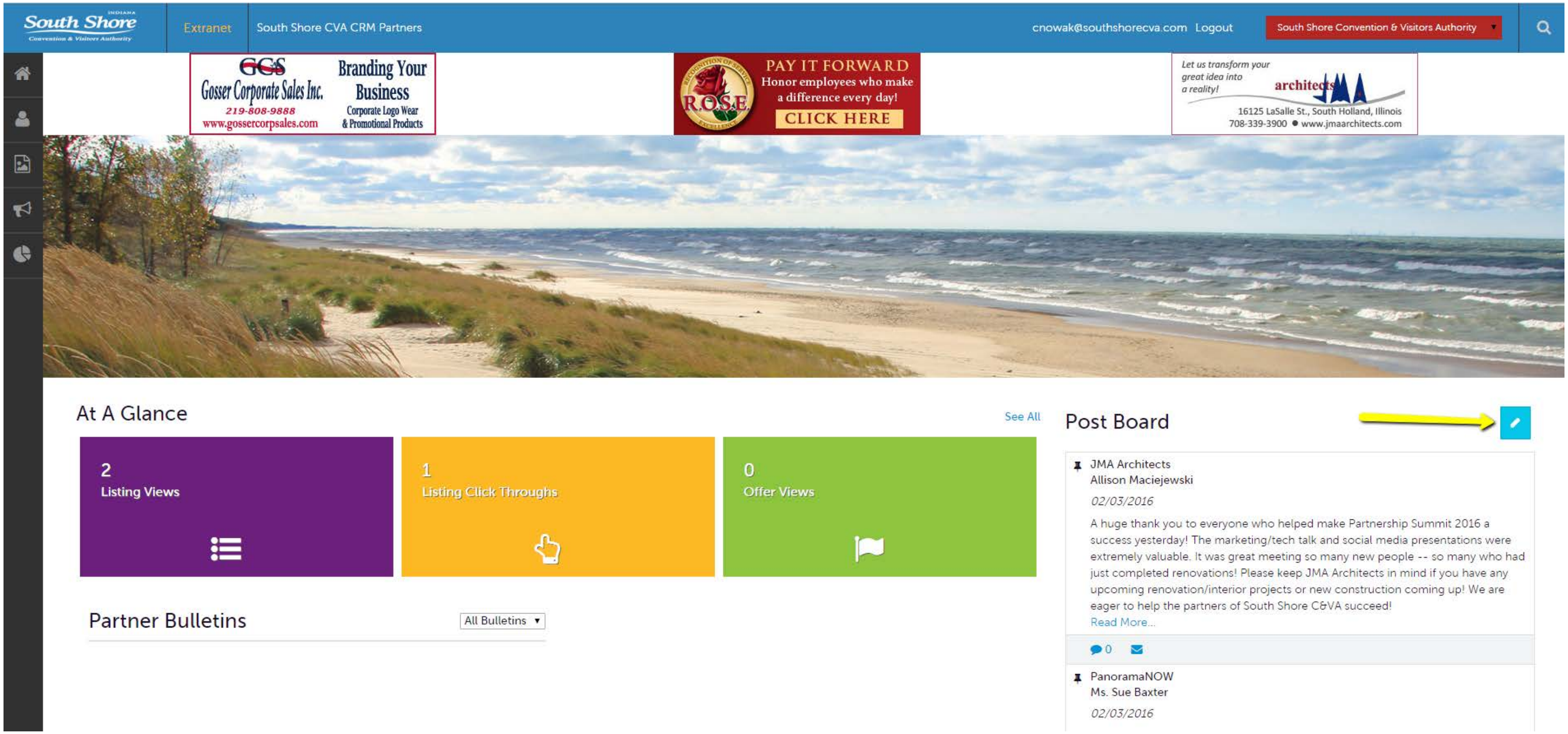


Home Screen



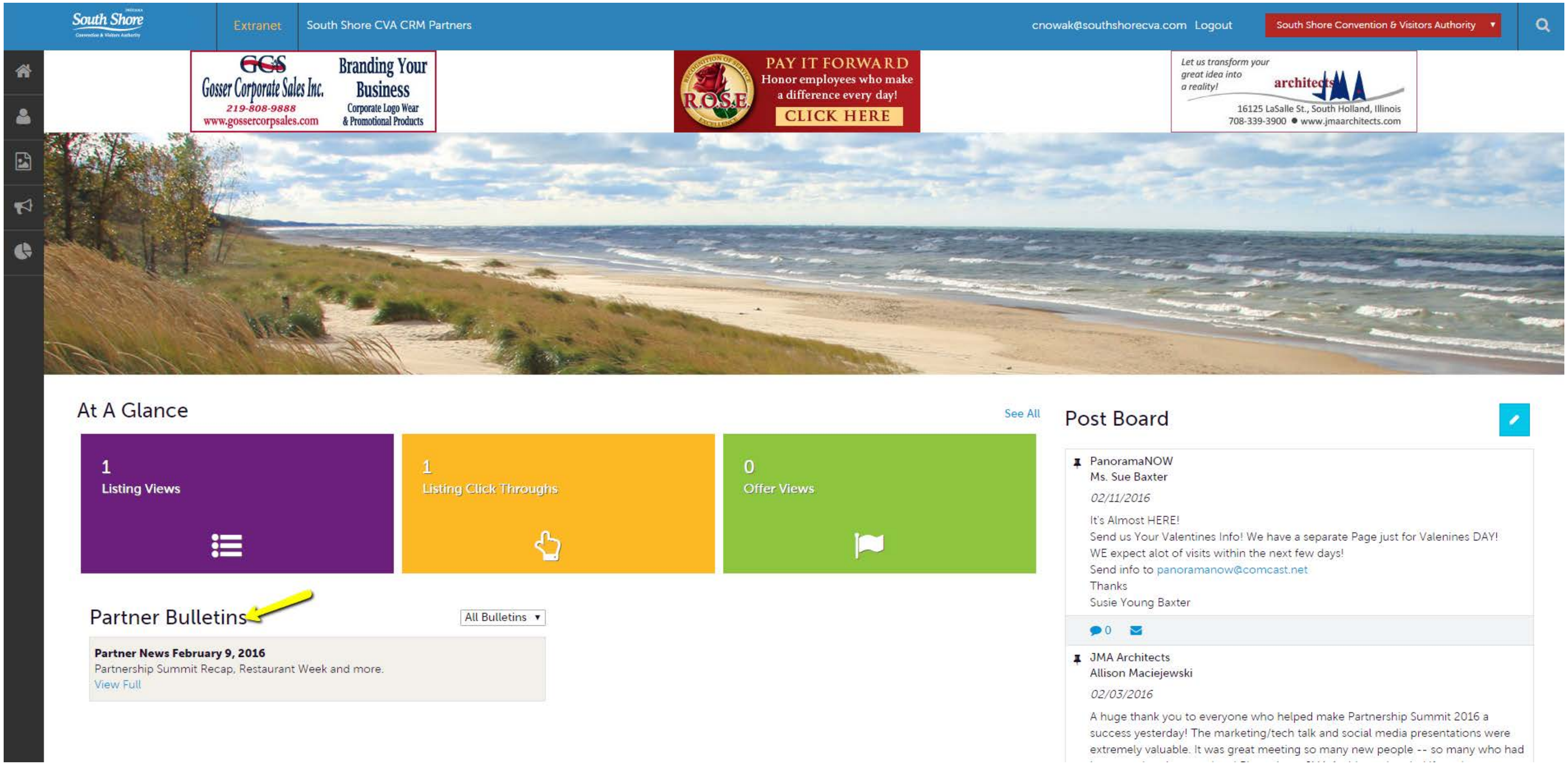
At A Glance is a brief view of your listing and special offers tracking. You can also click the **See All** link to the right to view more information about your property interaction with the CVA.

Home Screen (cont'd)



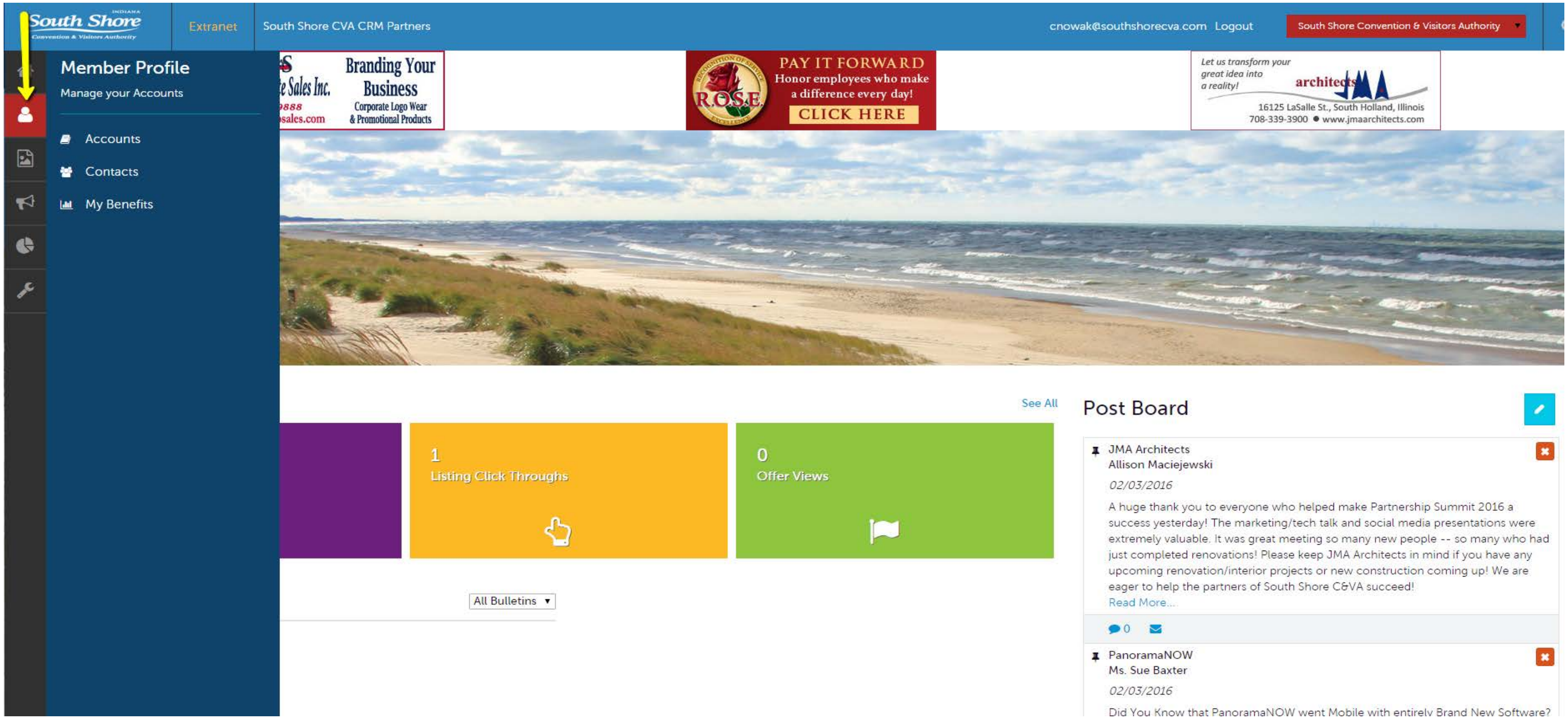
Post Board allows you to communicate with other properties in your destination. By clicking on the caption bubble icon, you can **reply to a post**. You can also email the poster by clicking the mail icon.

Home Screen (cont'd)



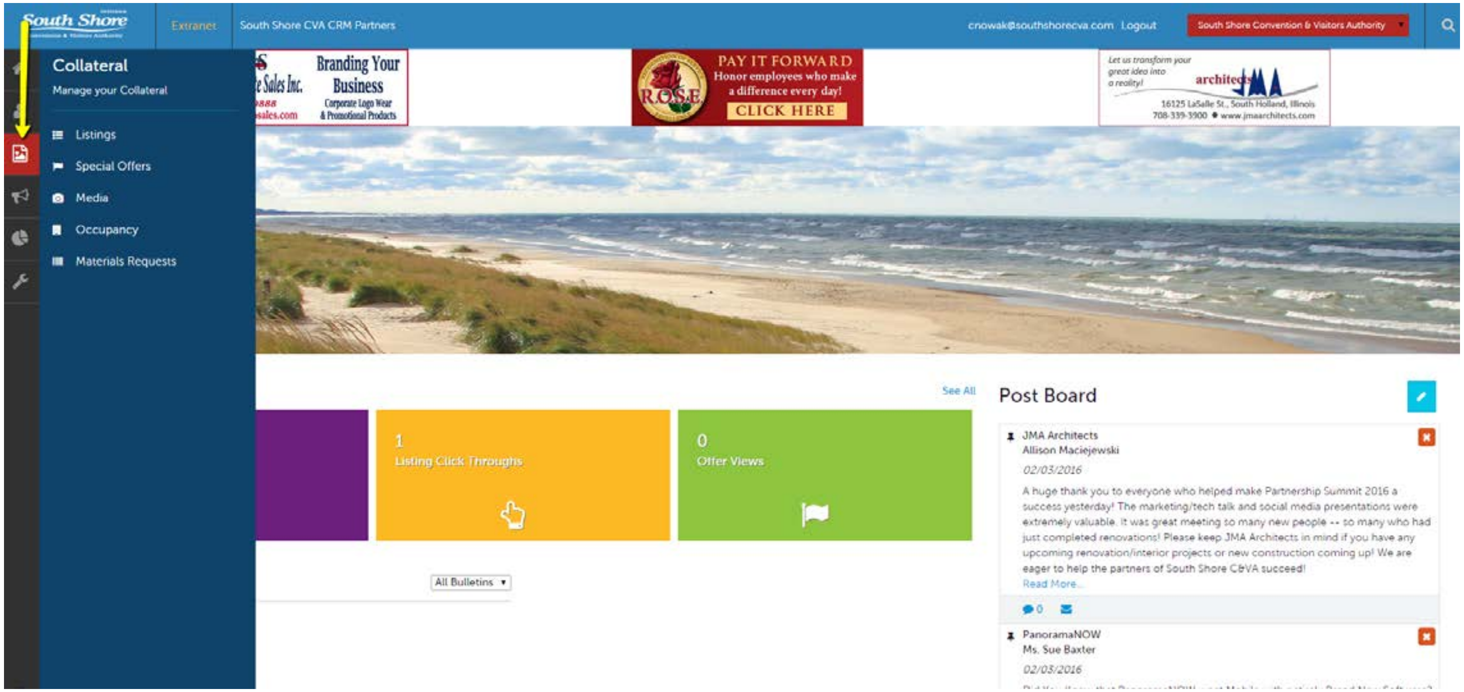
Partner Bulletins are important notices, documentation, events, etc…

Home Screen (cont'd)



By clicking the Member Profile icon, you can view/edit your property information, contacts associated with your property and view information about your property interaction with the CVA. More on these options later in the PowerPoint.

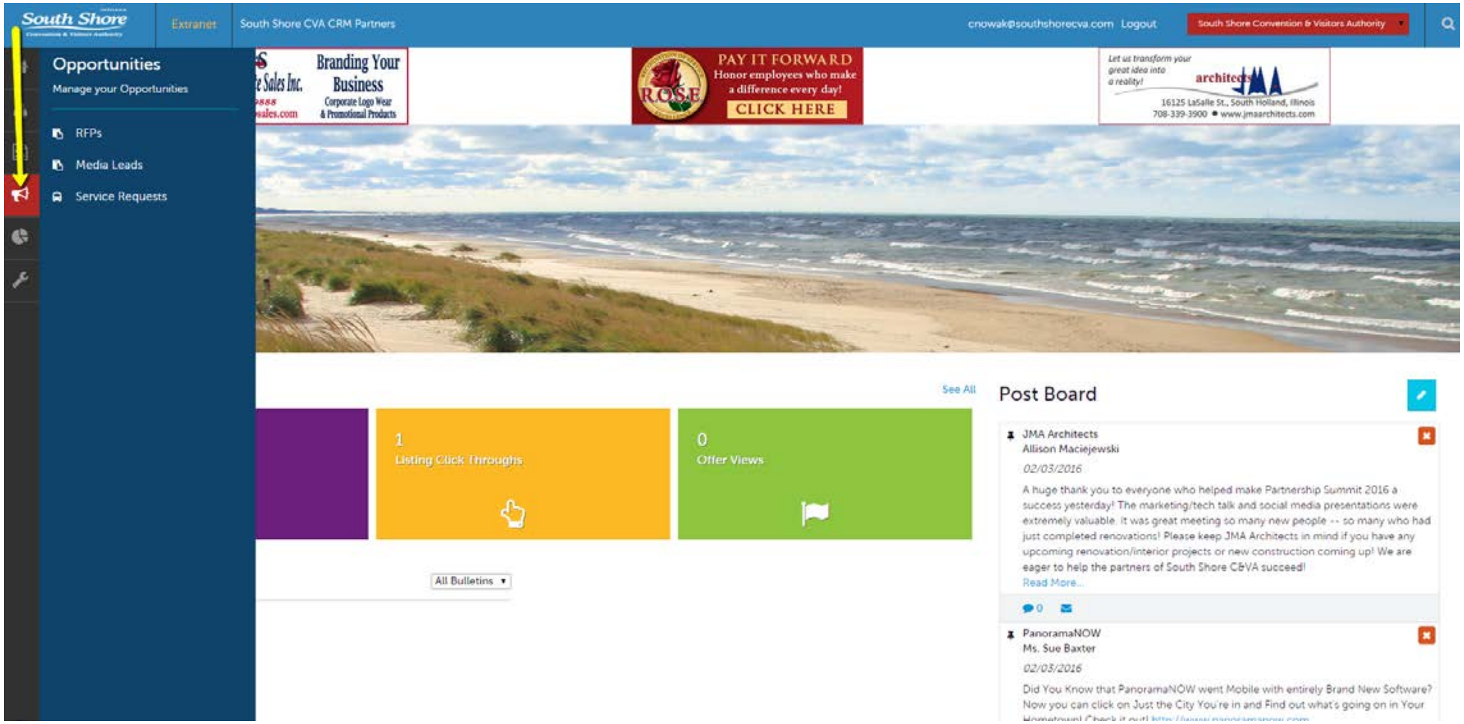
Home Screen (cont'd)



By clicking the Collateral icon, you can view, edit and or add your listings and publication guides, special offers, calendar of events, media (i.e. images), occupancy data, and request materials from the CVA.

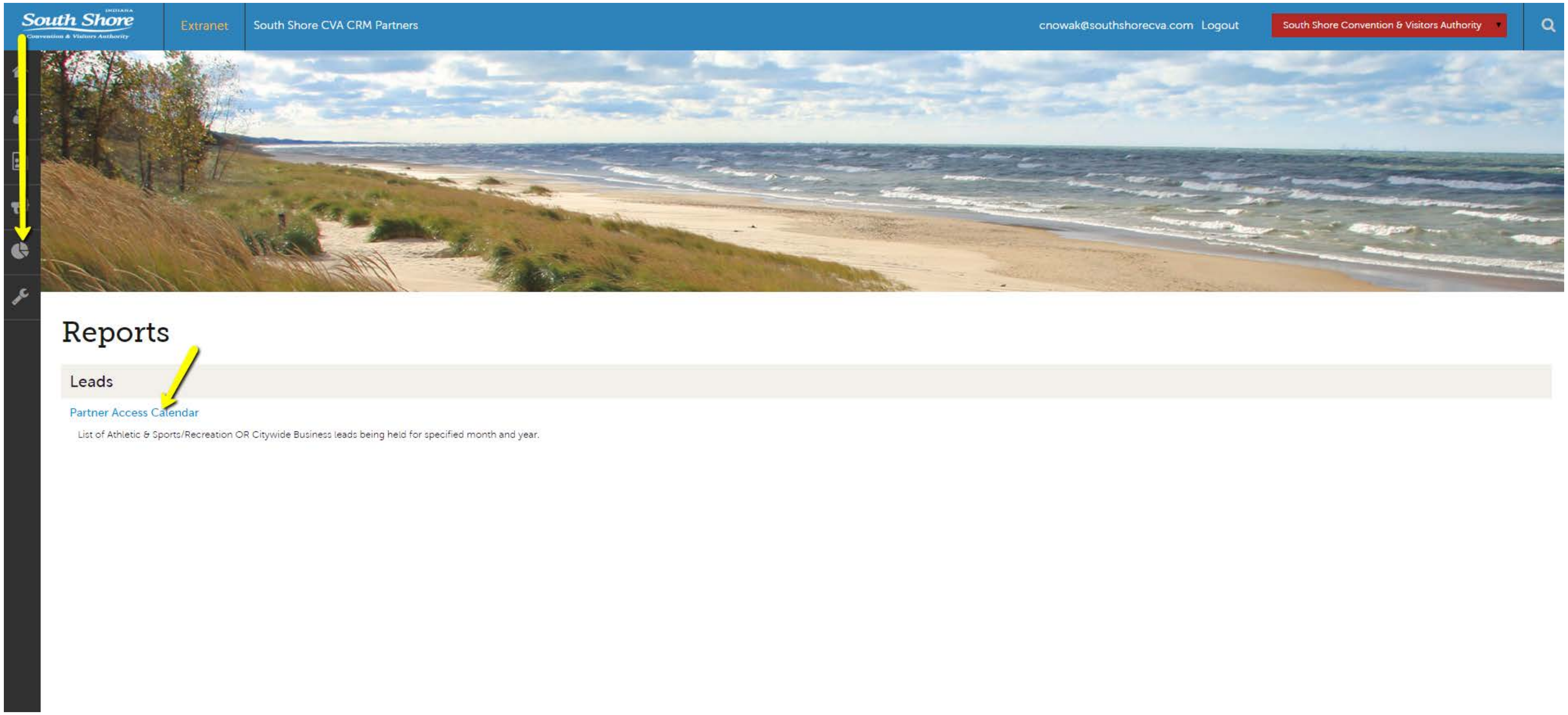
Note: Some of these options are just view, edit and/or add. More on these options later in the presentation.

Home Screen (cont'd)



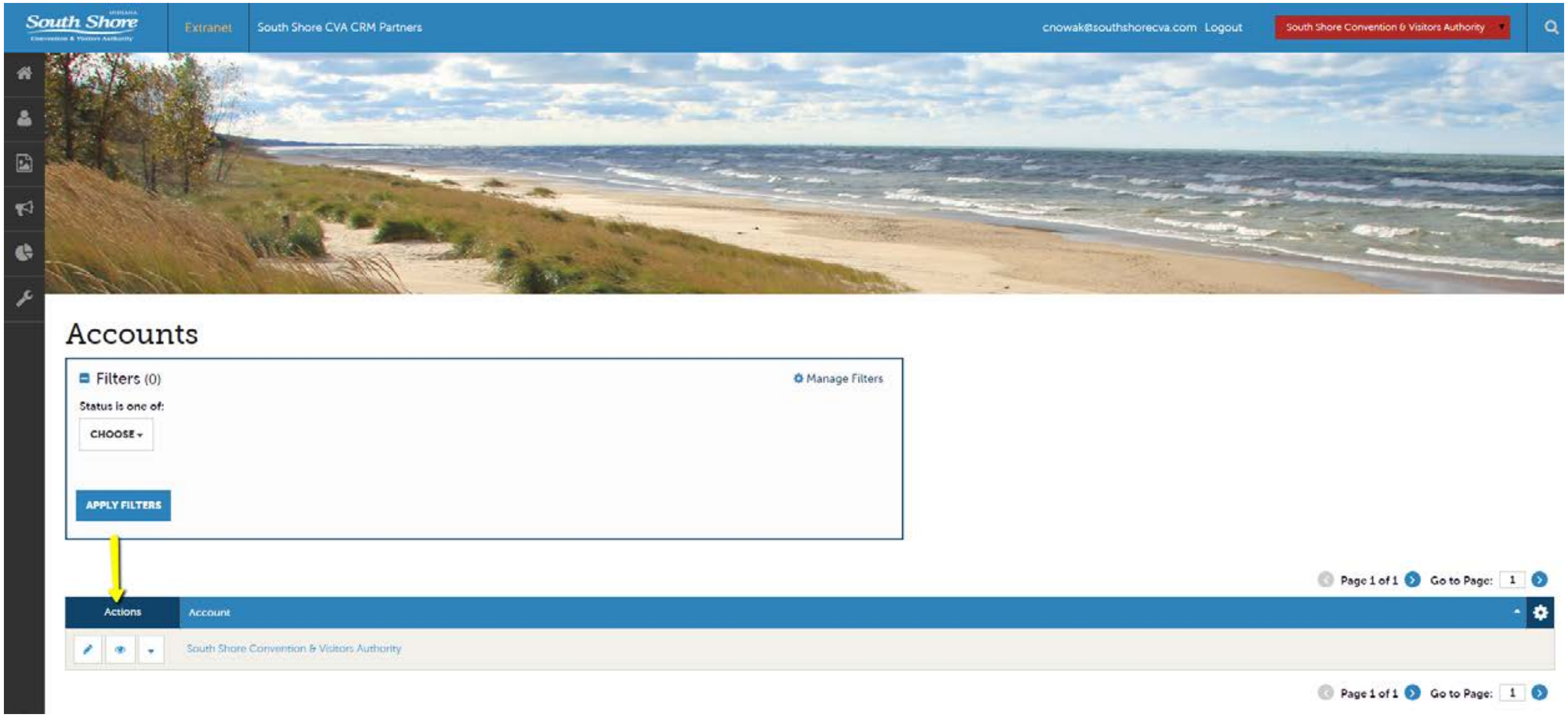
By clicking the Opportunities icon, you can view and respond to RFPs sent to you by the CVA. Opportunities are broken in RFPs (meeting and tour leads), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs). More on these options later in the presentation.

Home Screen (cont'd)



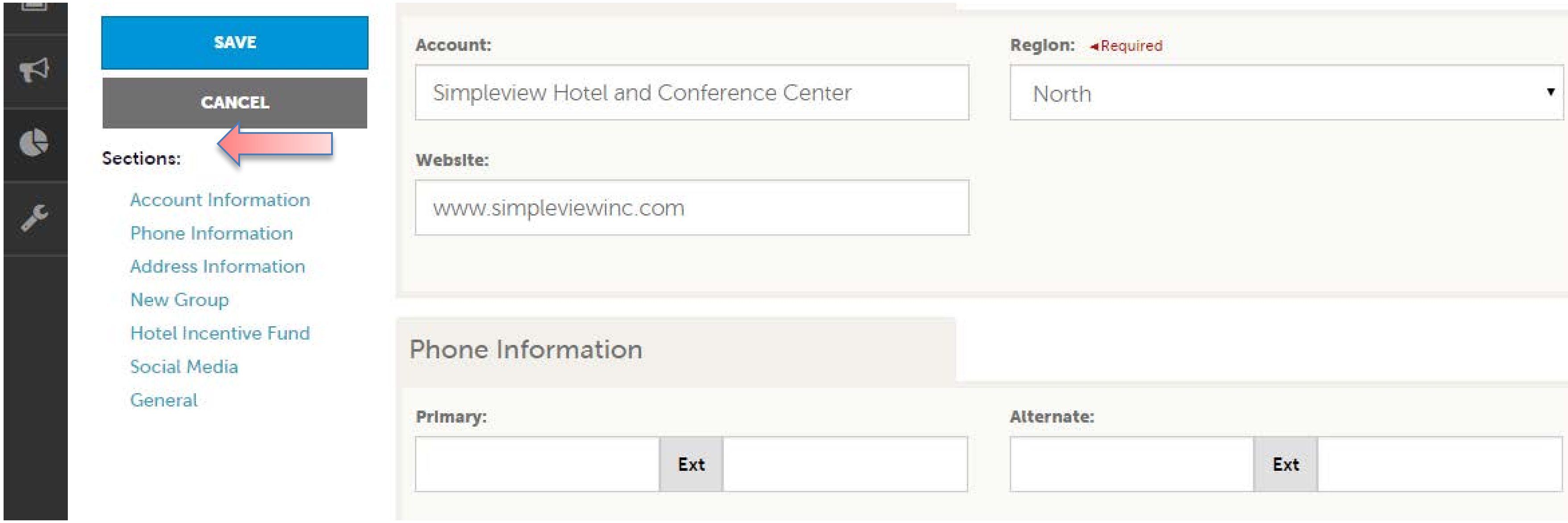
By clicking the Reports icon, you can view reports the CVA has posted for you. To view a report just click the name of the report.

Member Profile - Accounts



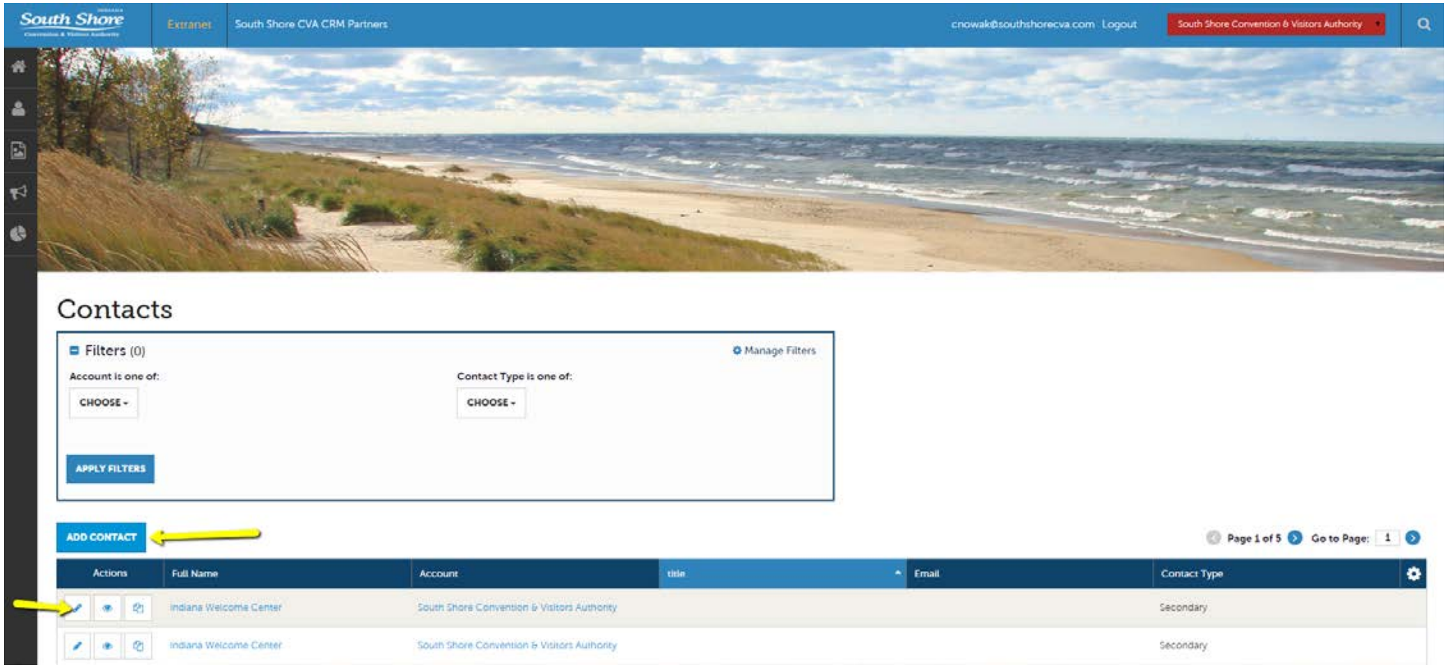
After you click the Member Profile icon and then Accounts, you will be presented with your account name and various action you can perform. If you see multiple account names, this is due to your property being associated with another property. The pencil icon will allow you to edit your property information.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

Member Profile - Accounts (cont'd)



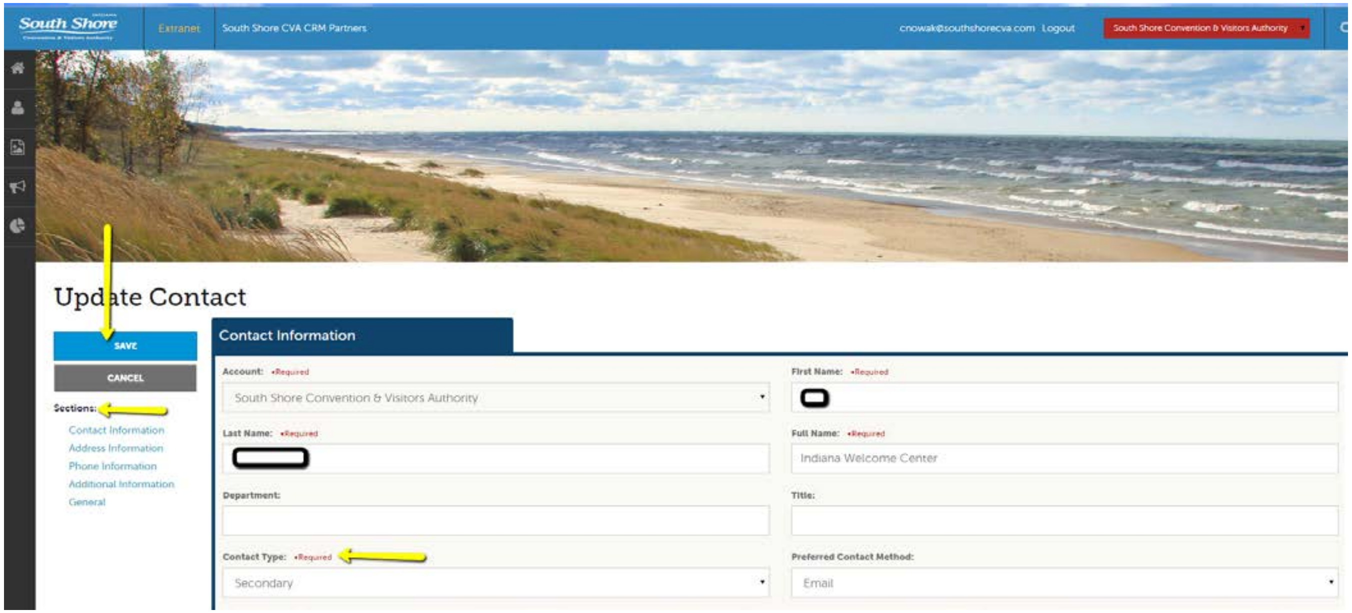
When you view or edit your property information, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing the account, the button on the top left will say Edit. If you are editing the account, the top left button will say Save. *You must click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

Member Profile - Contacts



After you click the Member 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 and Clone (i.e. duplicate) a contact depending upon your extranet permissions.

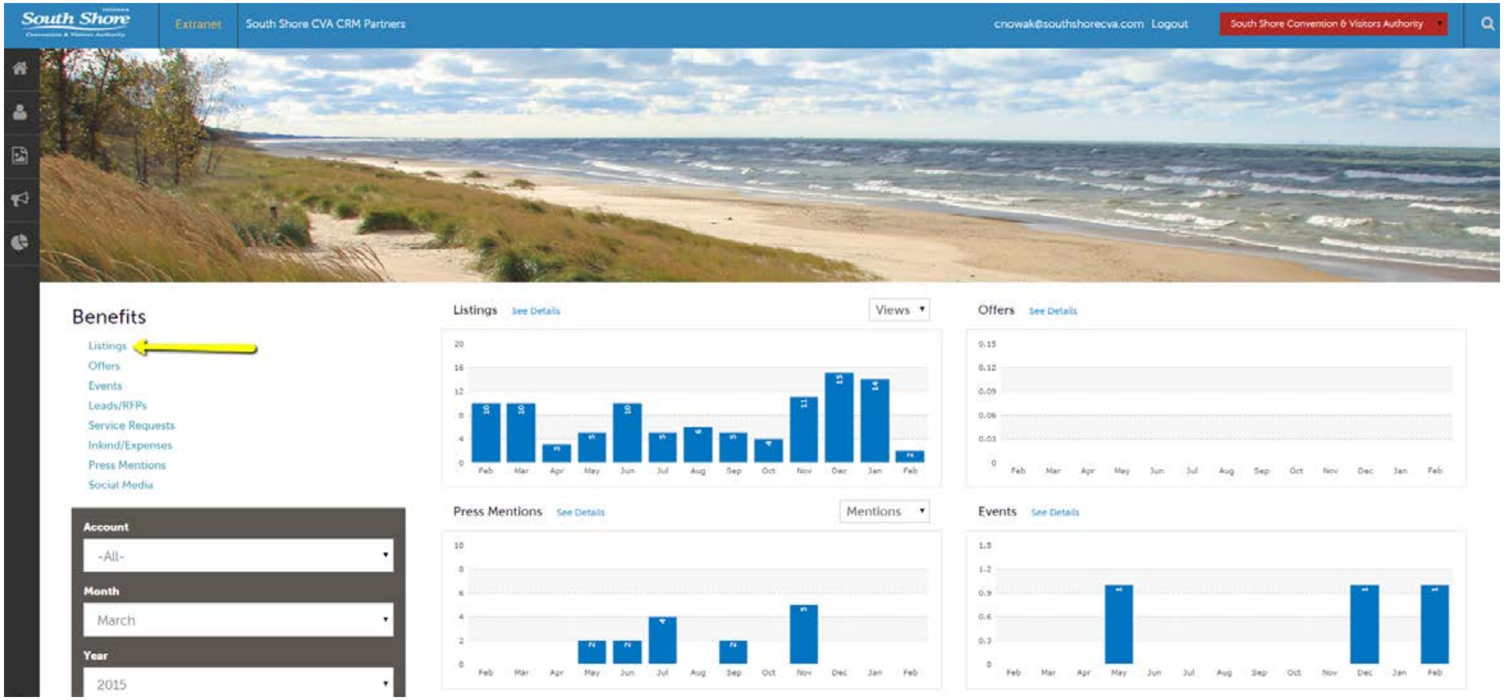
Member Profile - Contacts (cont'd)



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 button in the top left will say Edit. If you are editing a contact, the top left button will say Save. *You must click the Save button before any of your changes are actually saved!*

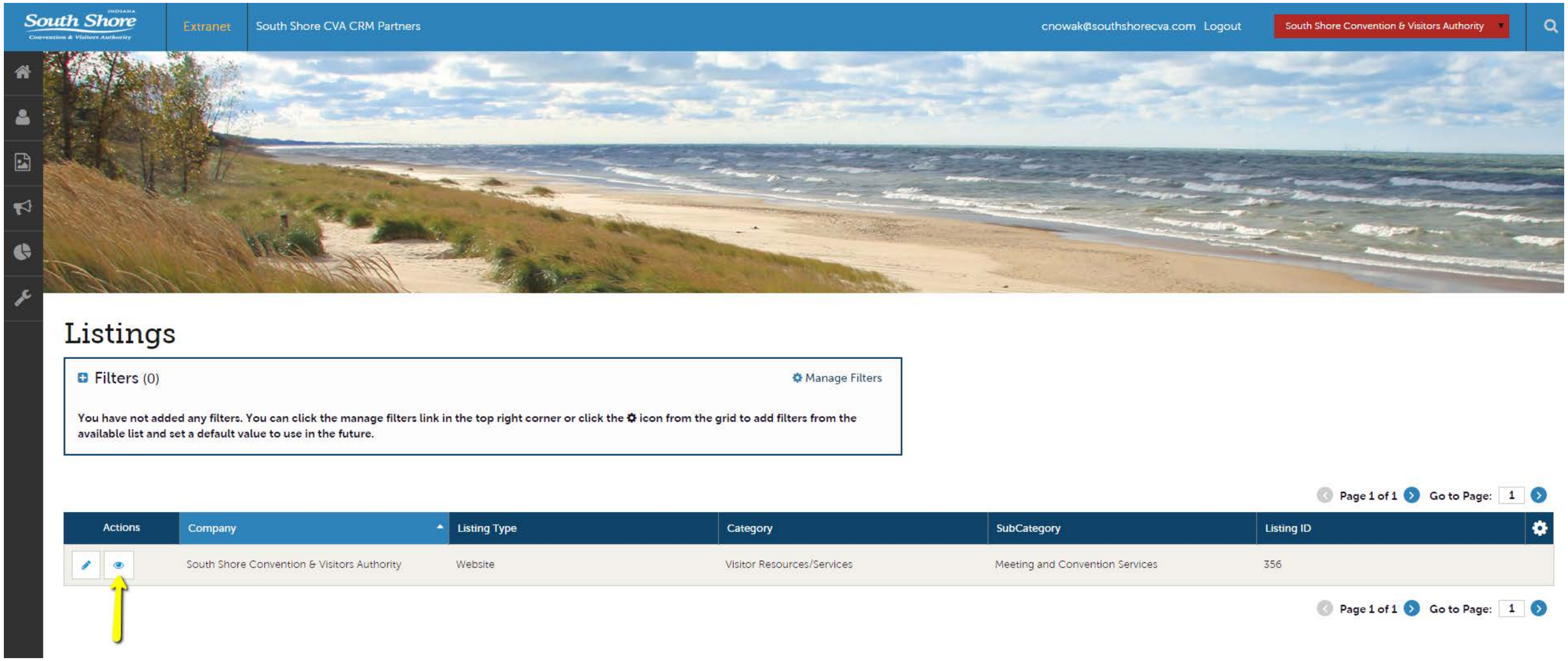
<u>IMPORTANT NOTE</u>: If a contact has left your property it is your responsibility to notify the CVA and/or change their contact type to "Inactive".

Member Profile - My Benefits



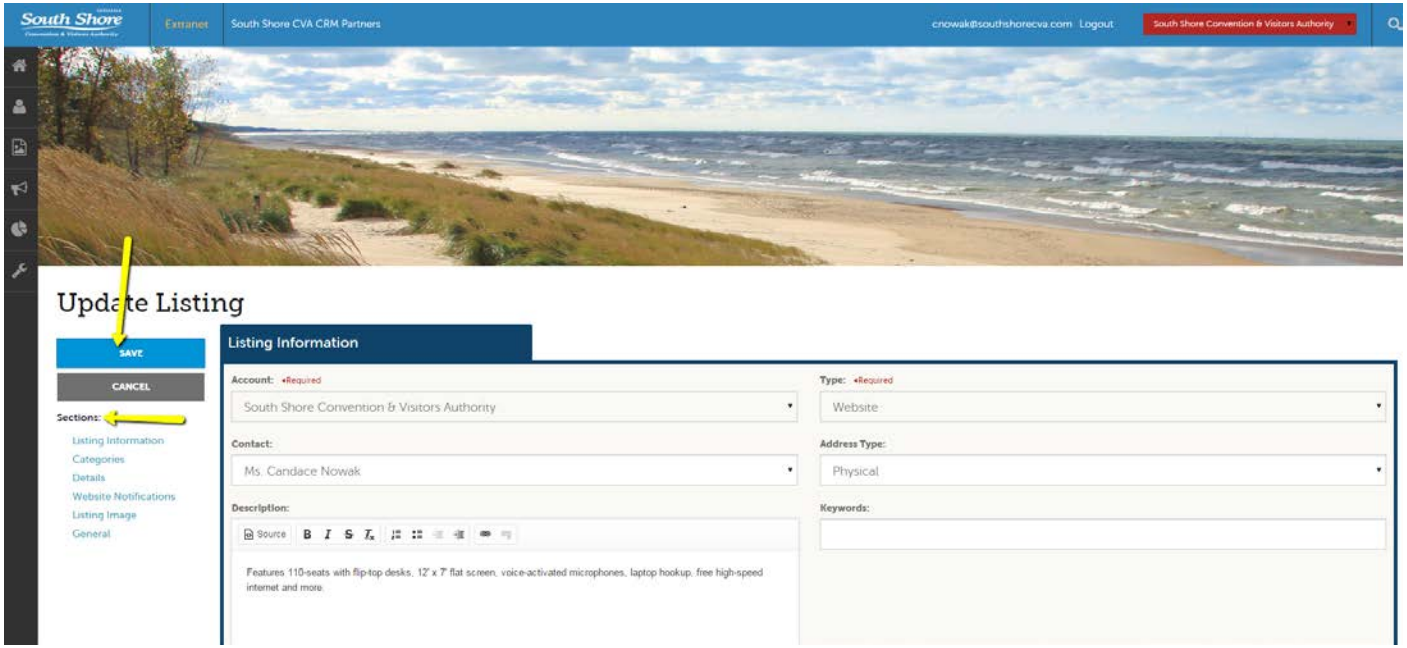
After you click the Profile icon and then My Benefits, you will be presented summary reports based off of the CVA's interaction with your property. The information you see on this page is specifically related to your property.

Collateral - Listings



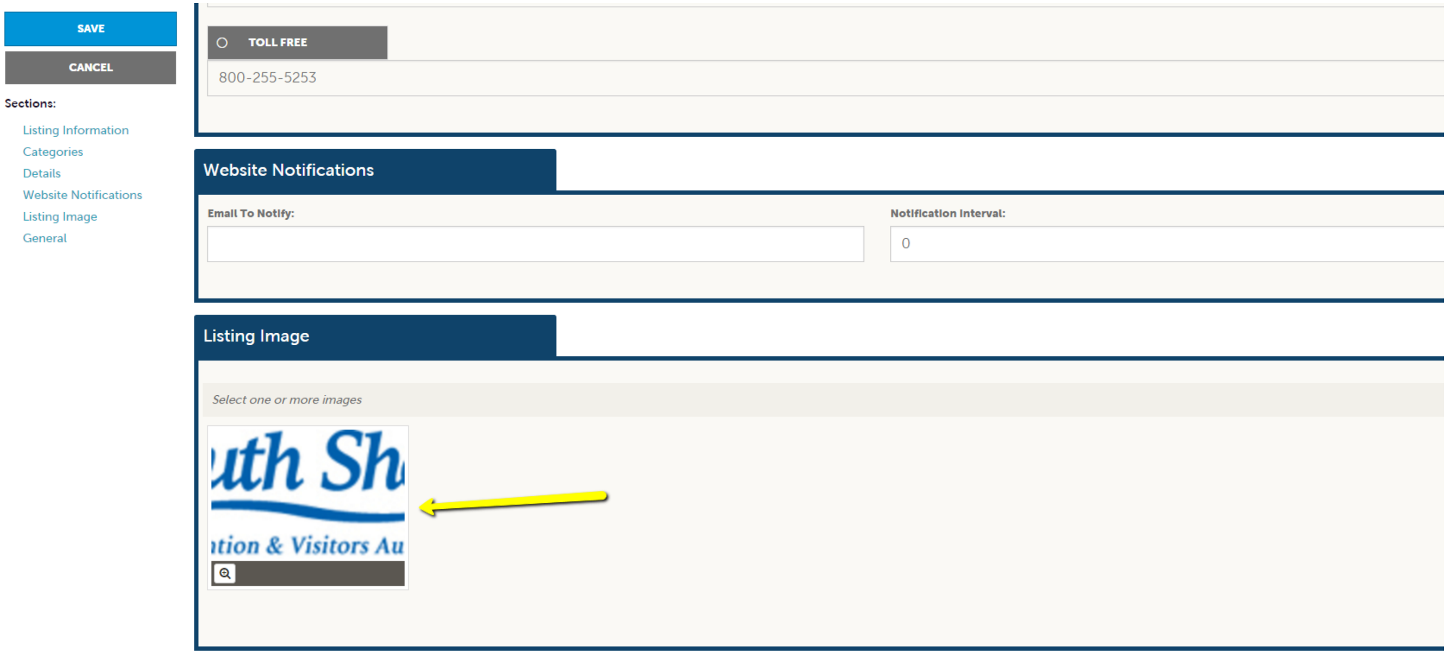
After you click the Collateral icon and then Listings, you will be presented with your property's listings. These listings may be website listings or visitor guide listings. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information.

Collateral - Listings(cont'd)



When you view or edit 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 button in the top left will say Edit. If you are editing a listing, 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 listings will require approval from the CVA. Upon saving your updates, the CVA will be notified of your changes/additions.

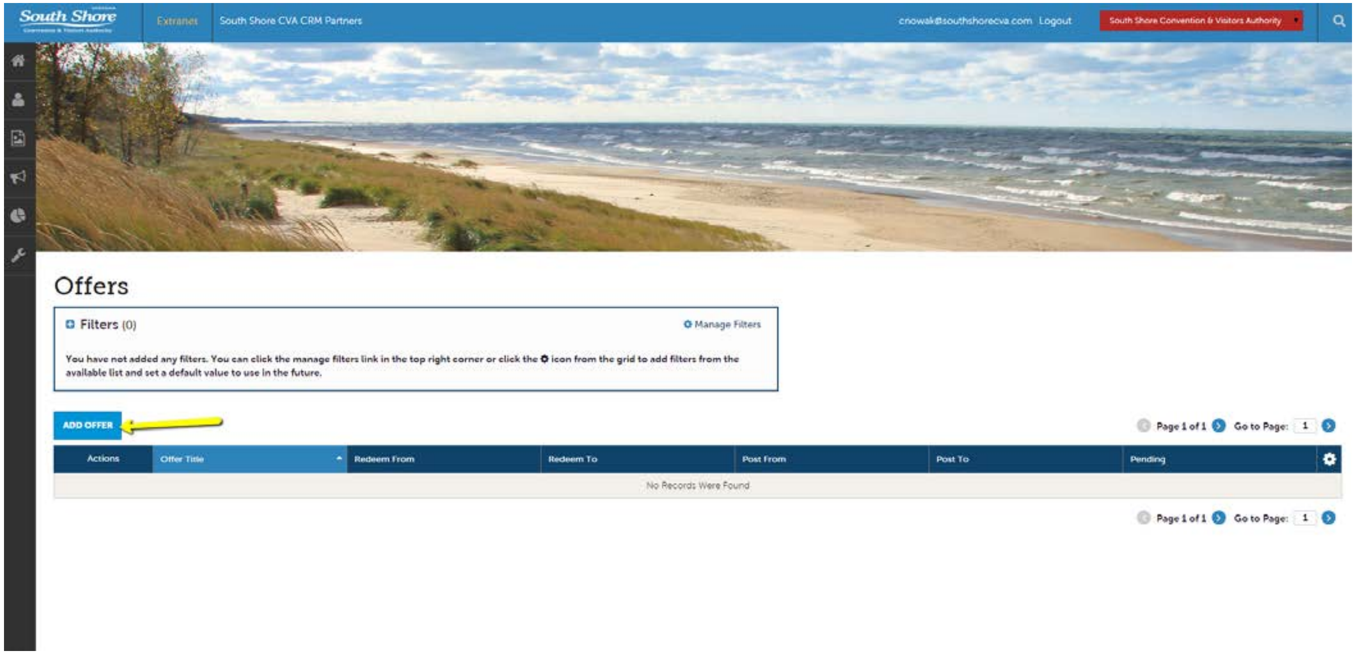
Collateral - Listings(cont'd)



When you edit a listing, you can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu. As mentioned in the previous slide; Any edits of listings will require approval from the CVA. Upon saving your updates, the CVA will be notified of your changes/additions. More on images in the Collateral – Media slide.

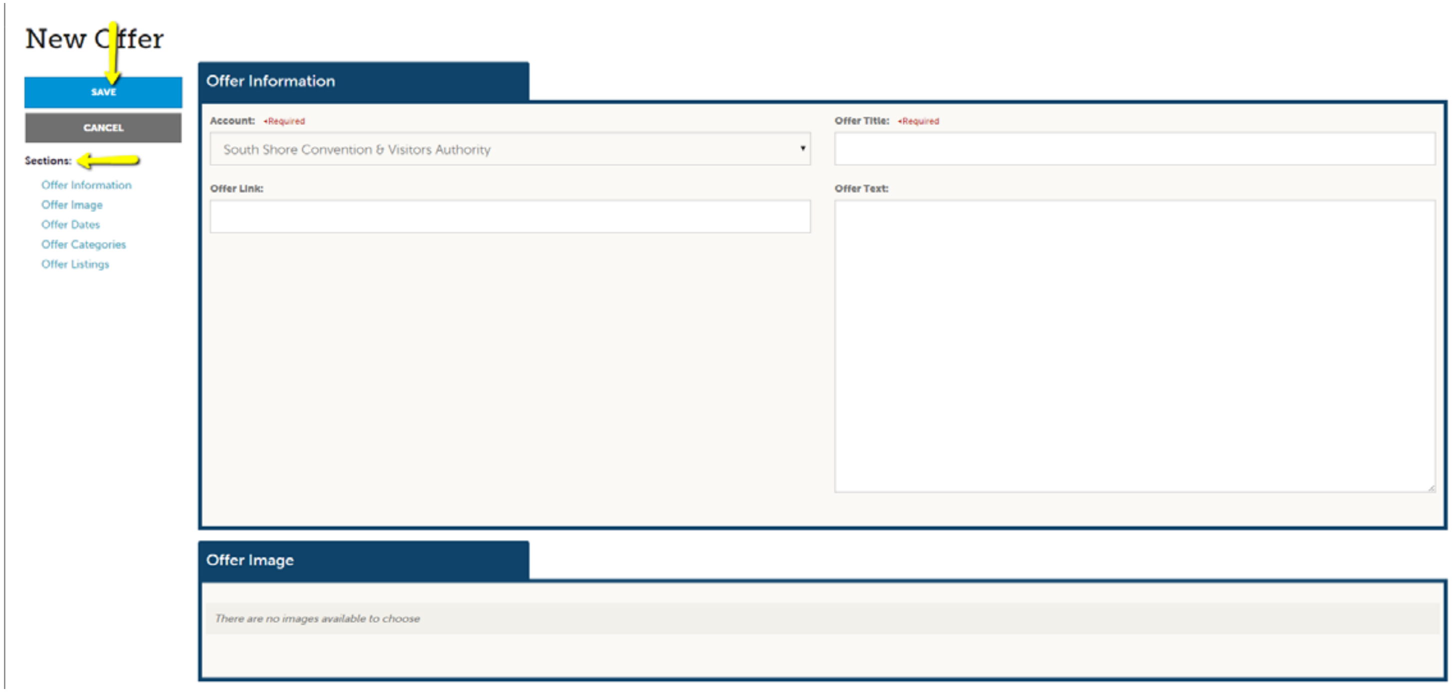
NOTE: Not all listing types allow for images to be added.

Collateral – Special Offers



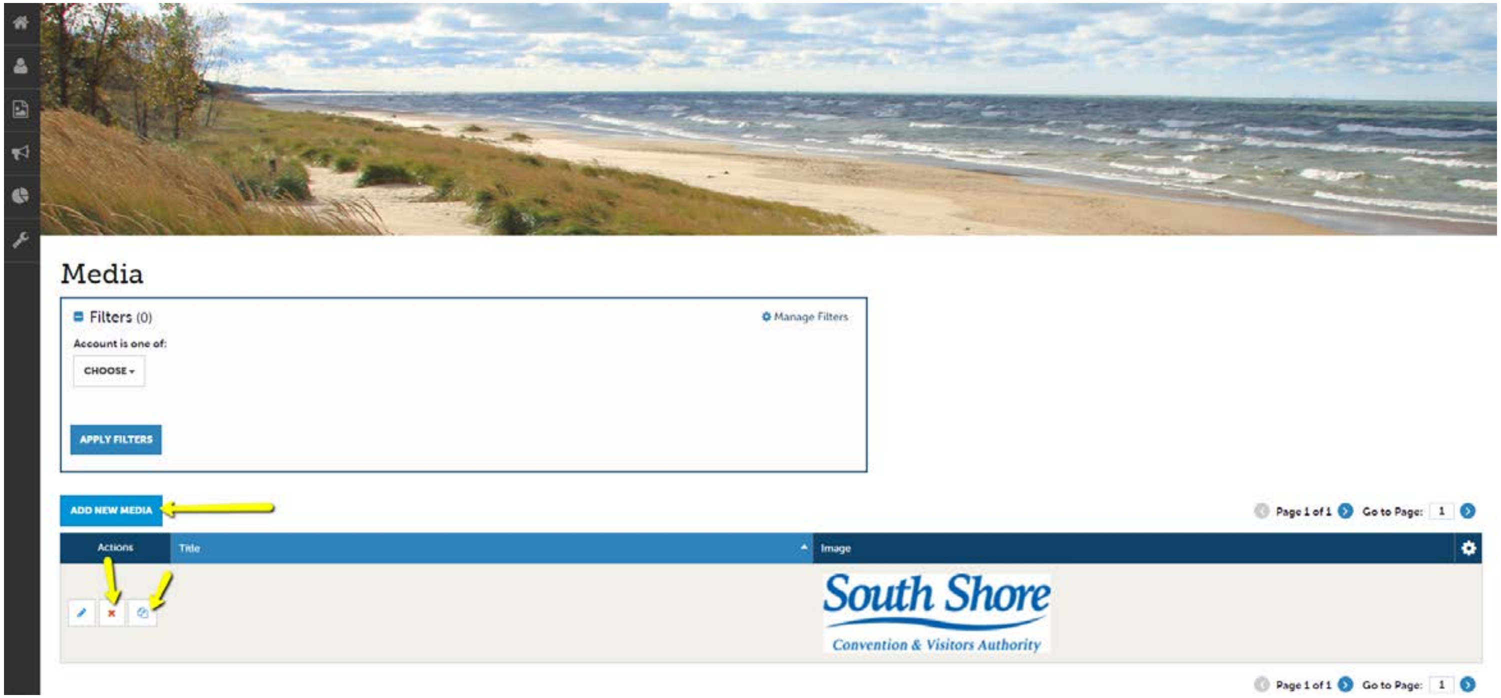
After you click the Collateral icon and then Special Offers, you will be presented with your property's offers. The pencil icon will allow you to edit an existing offer. By clicking the eyeball icon, you can view the existing offer. You can also create a new offer by clicking the Add Offer button.

Collateral – Special Offers (cont'd)



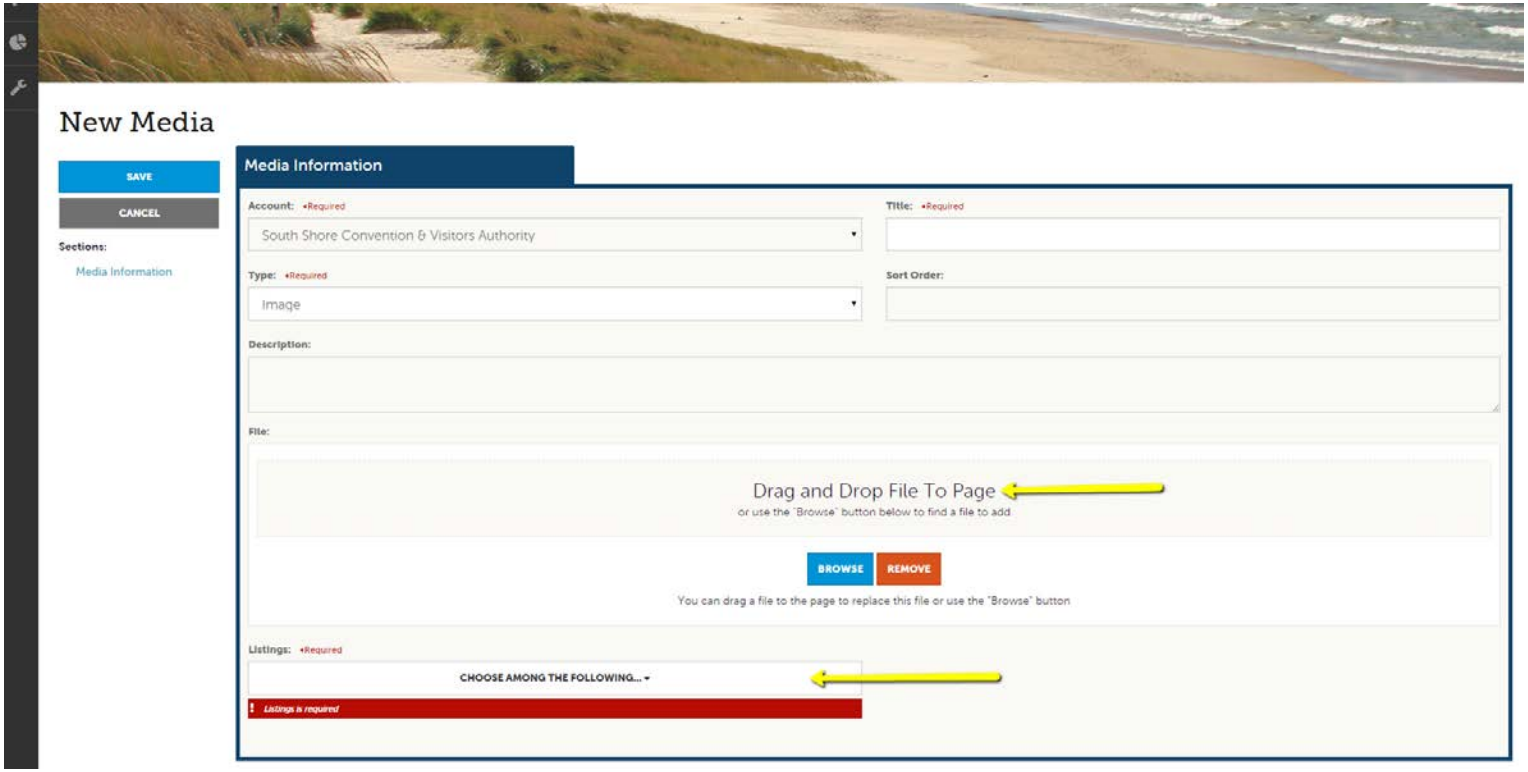
When you view, edit, or add an offer, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing an offer, the button in the top left will say Edit. If you are editing an offer, the top left button will say Save. *You must click the Save button before any of your changes are actually saved!* As with listings, you have the ability to attach images to your offers.
IMPORTANT NOTE: Any edits or adding of offers will require approval from the CVA. Upon saving your updates, the CVA will be notified of your changes/additions.

Collateral – Media



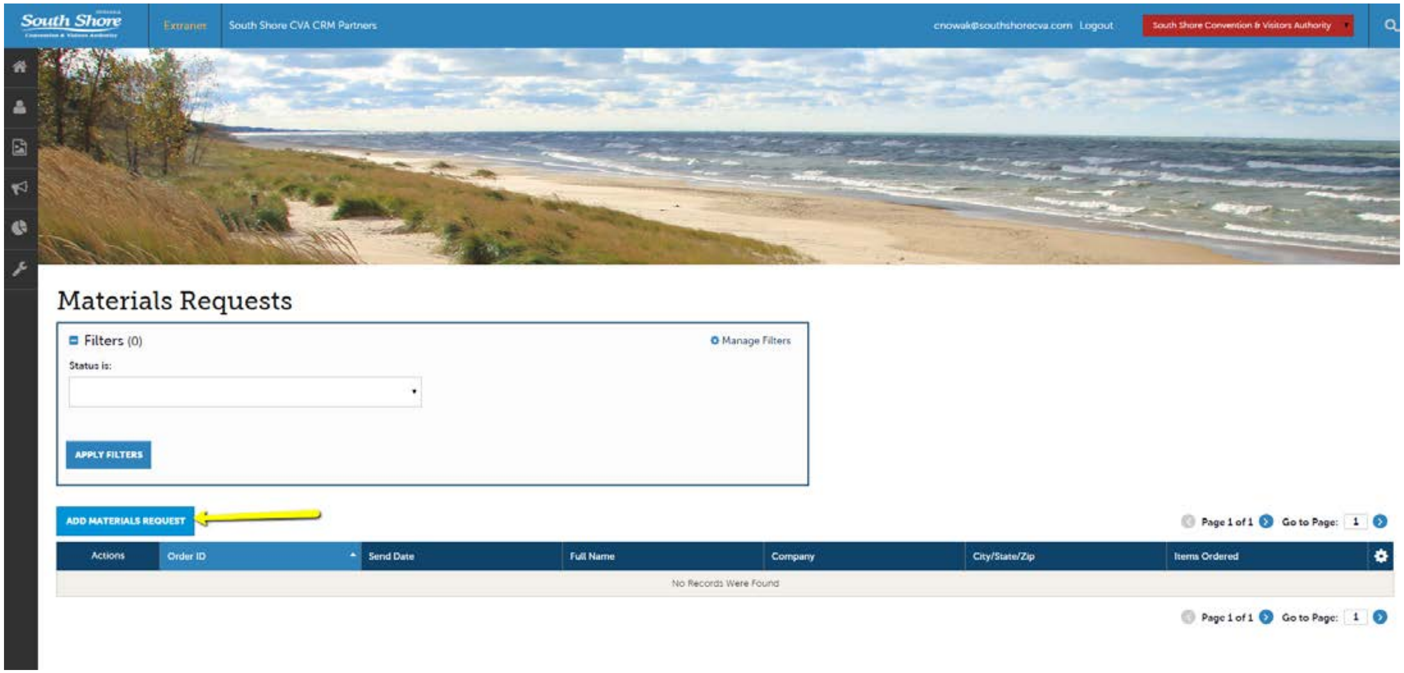
After you click the Collateral icon and then Media, you will be presented with your property's images to possibly be used in listings and special offers. The pencil icon will allow you to edit an existing image. By clicking the red x icon, you can delete an existing image. The clone icon will allow you to duplicate an image. You can also clone an image by clicking the icon with two sheets of paper.

Collateral – Media (cont'd)



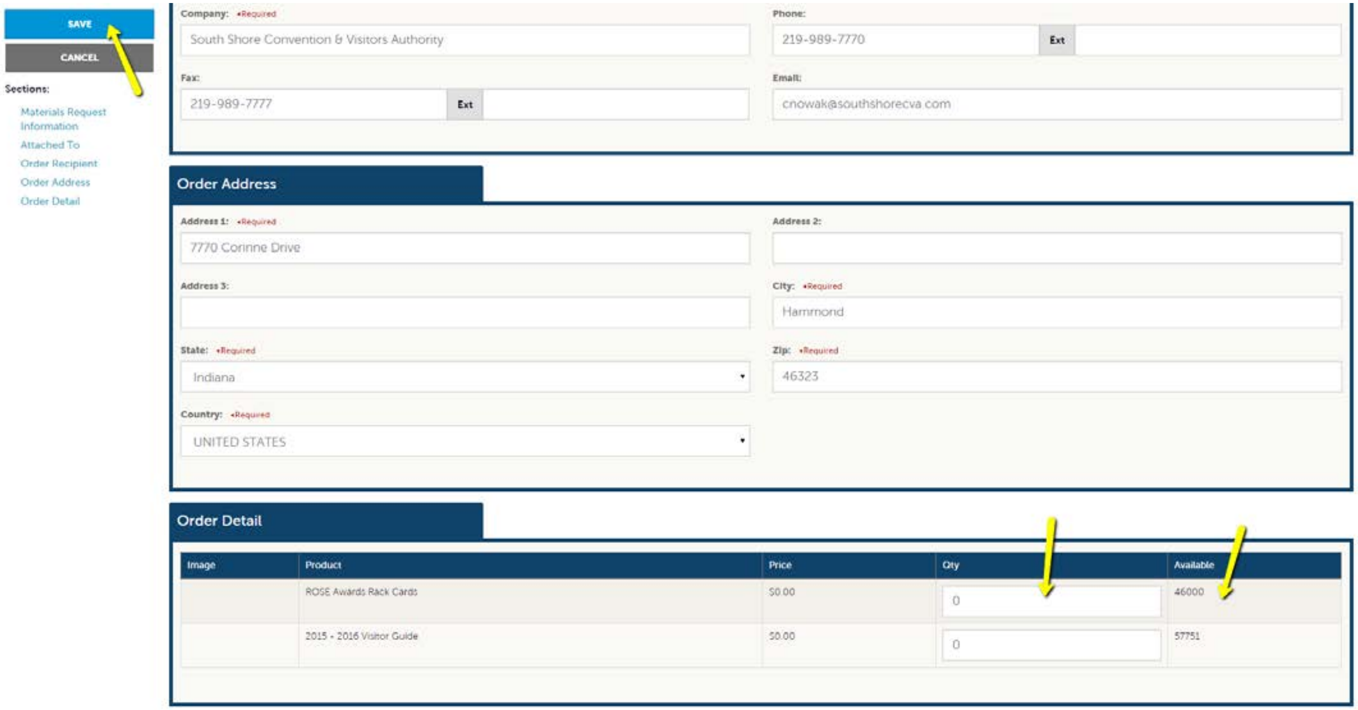
You can browse your hard drive or drag and drop an image. Once you upload a new image or edit an existing one you can attach the image to one or multiple listings by selecting the Listings pull down menu.

Collateral – Materials Request



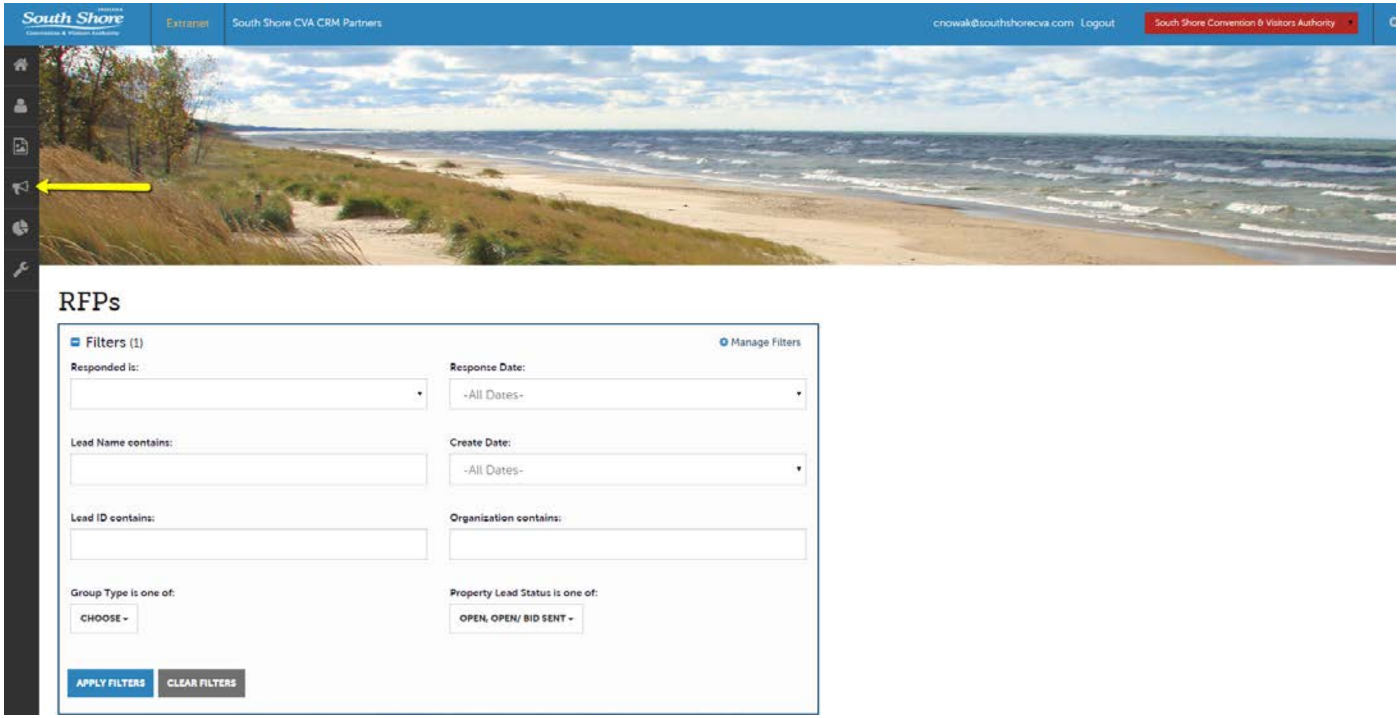
After you click the Collateral icon and then Materials Request, you will be presented with a list of orders you have submitted to the CVA. This feature will allow you to request collateral such as publication guides from the CVA. To request new materials click the Add Materials Request button. You can also edit, view or clone (duplicate) an existing order by clicking the Pencil, Eyeball, or Clone (2 sheets of paper) icons.

Collateral – Materials Request (cont'd)



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*, the CVA will be notified of your request.

Opportunities – RFPs



After you click the RFP icon and then RFPs, you will be presented with your property's Sales and Tour Leads. Depending upon your filters, this will determine which leads you are presented. You can change your filters to narrow down your results by editing the filter fields and clicking the Apply Filters button. By default, you will see all of your open leads and leads you have already bid on. For more on lead statuses and their definitions see the next slide.

Opportunities – RFPs (cont'd)

LEAD STATUS DEFINITIONS

On the portal 4.0 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 yet 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 gone lost.

7. Closed / Cancelled: These are leads 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)

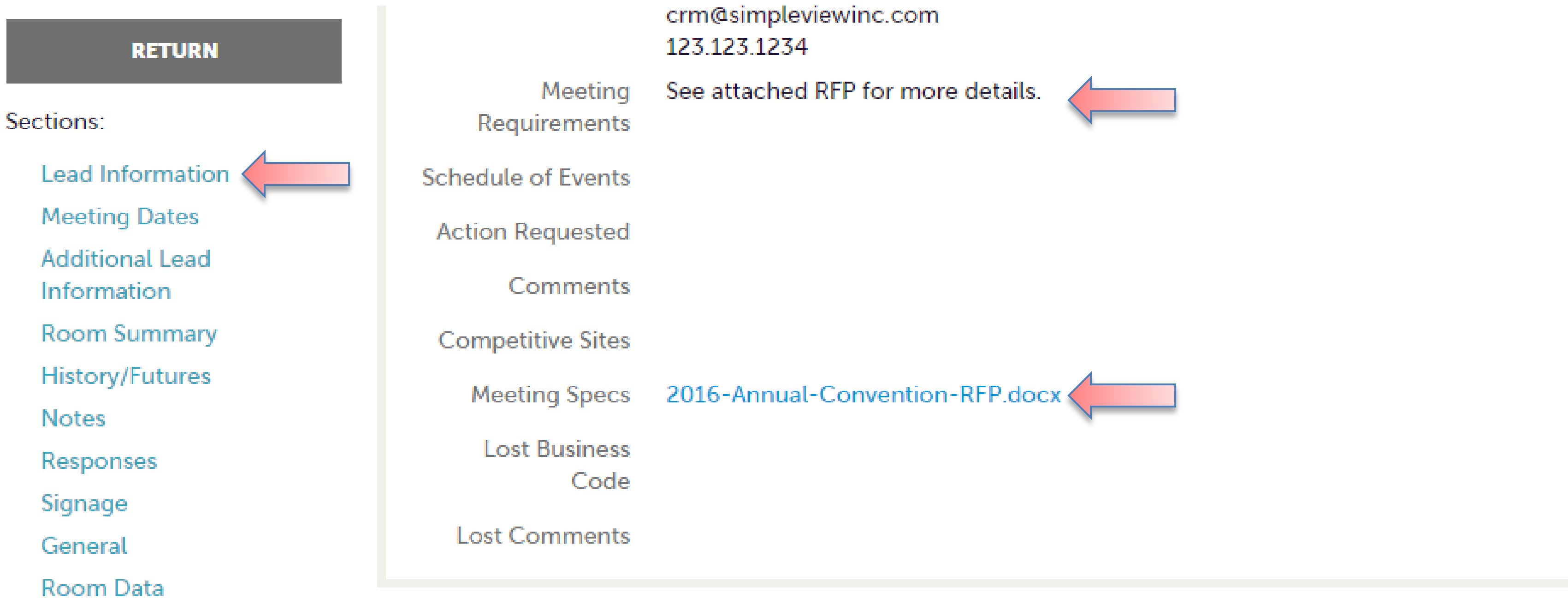
Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)
	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 upon your chosen filters. 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.

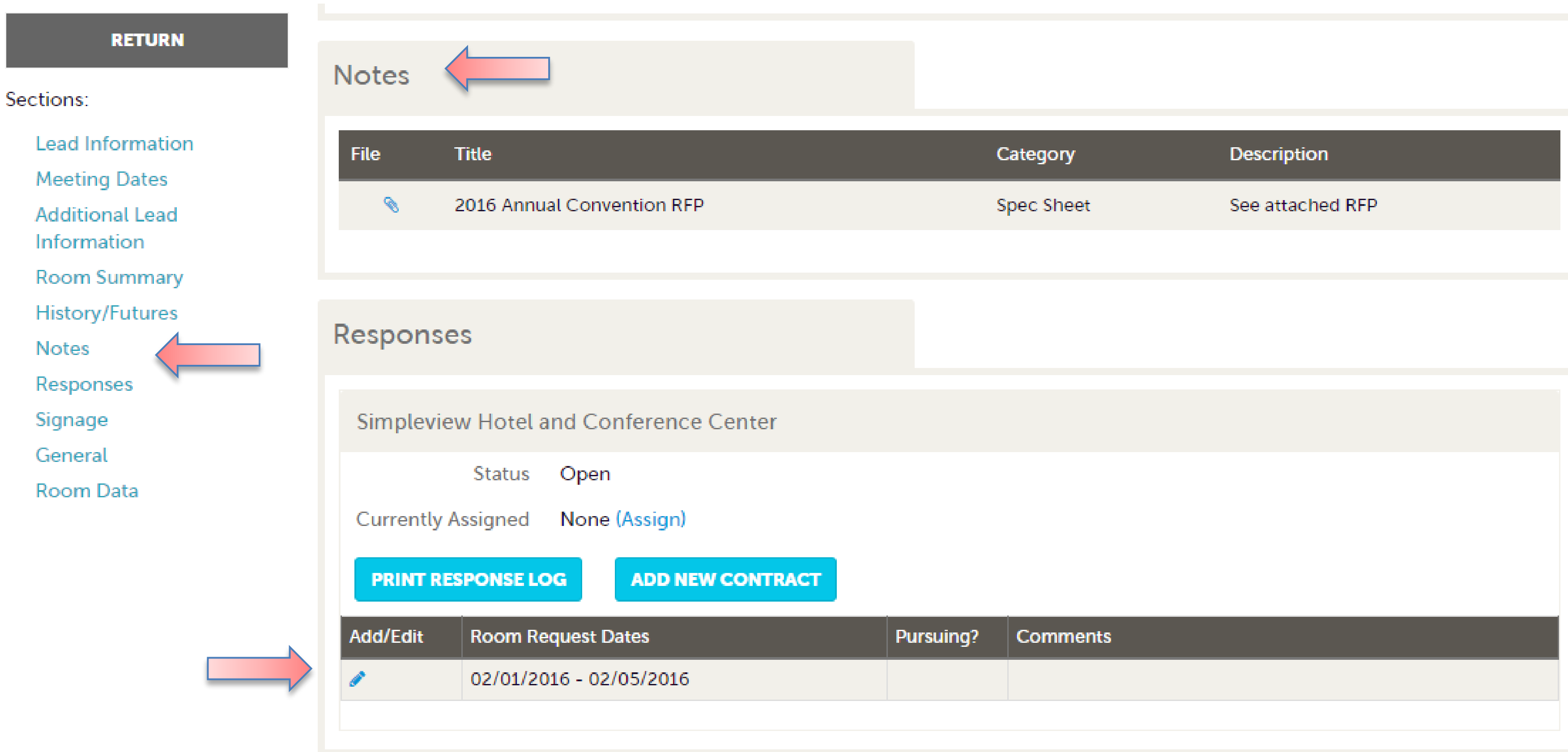
To view the lead, click on the Eyeball icon or the Lead Name.

Opportunities – RFPs (cont'd)



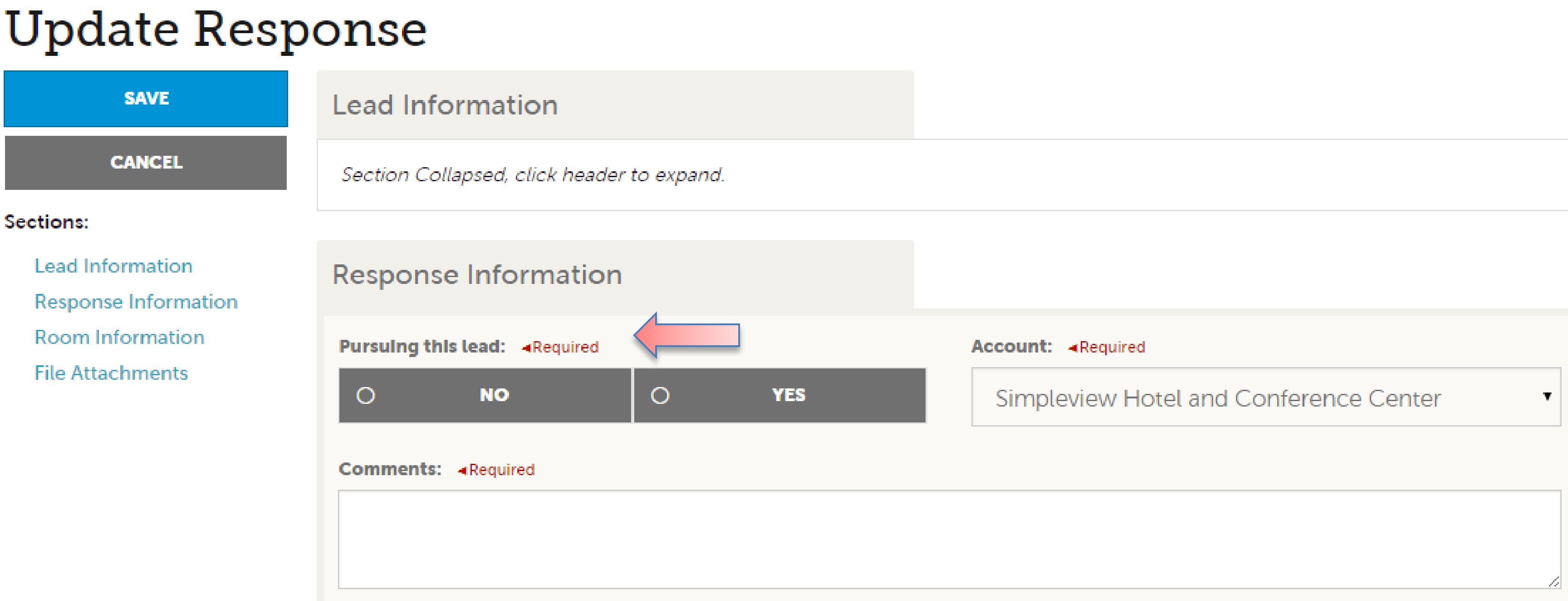
When viewing the lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the lead these can generally be found in one of two areas, Lead Information and/or Notes section. In the above graphic, this is the lead section; attachments will be found in the Meeting Specs field. For the Notes section, see next slide.

Opportunities – RFPs (cont'd)



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)



When editing your response, you will need to tell the CVA if you are pursuing the business by selecting Yes or No to the Pursuing this lead option.

Opportunities – RFPs (cont'd)

SAVE

CANCEL

Sections:

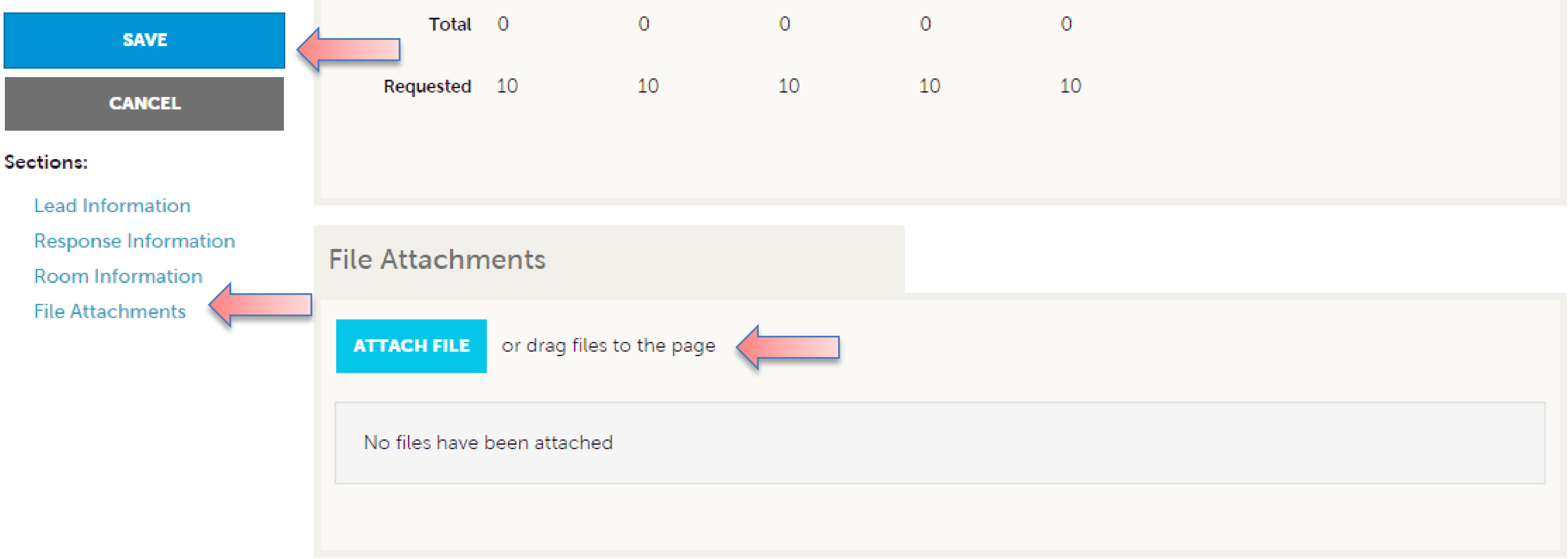
- Lead Information
- Response Information
- Room Information
- File Attachments

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		

If you are pursuing the piece of business, you can enter the number of rooms, by room type, that you can commit to for this lead in the Room Information section of the response page.

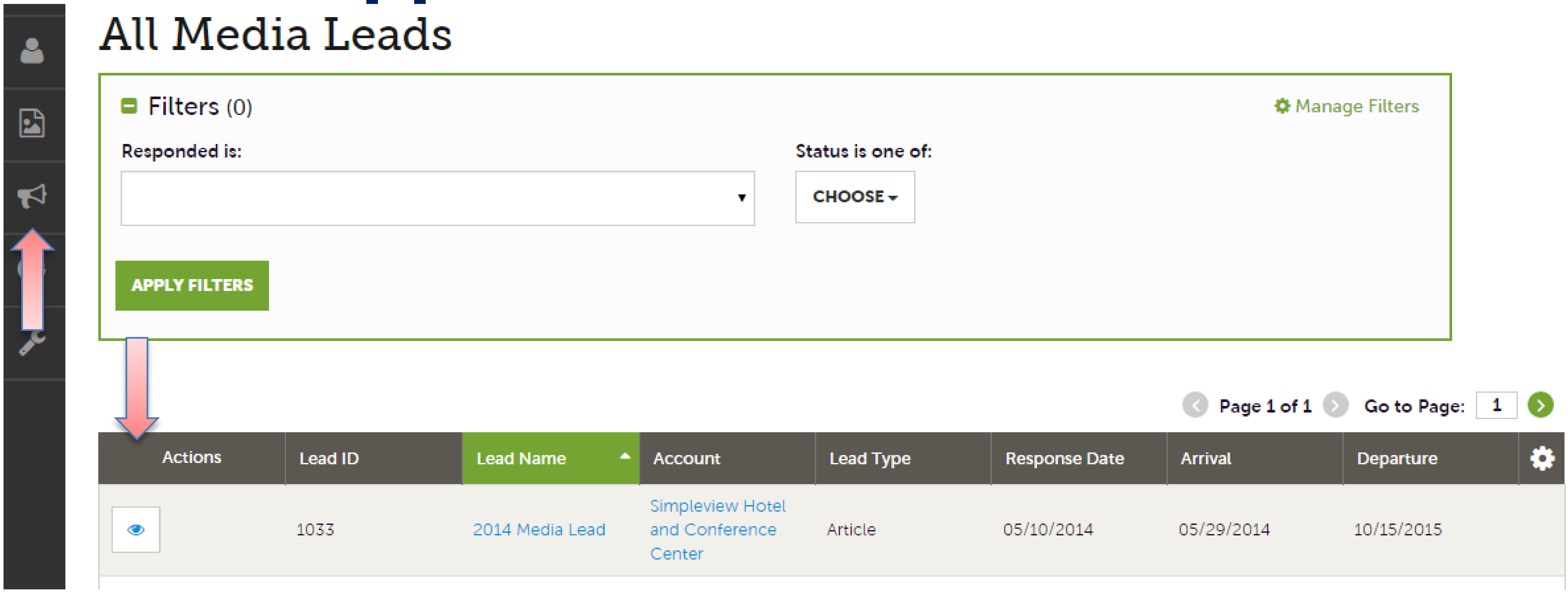
Opportunities – RFPs (cont'd)



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 your hard drive 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!

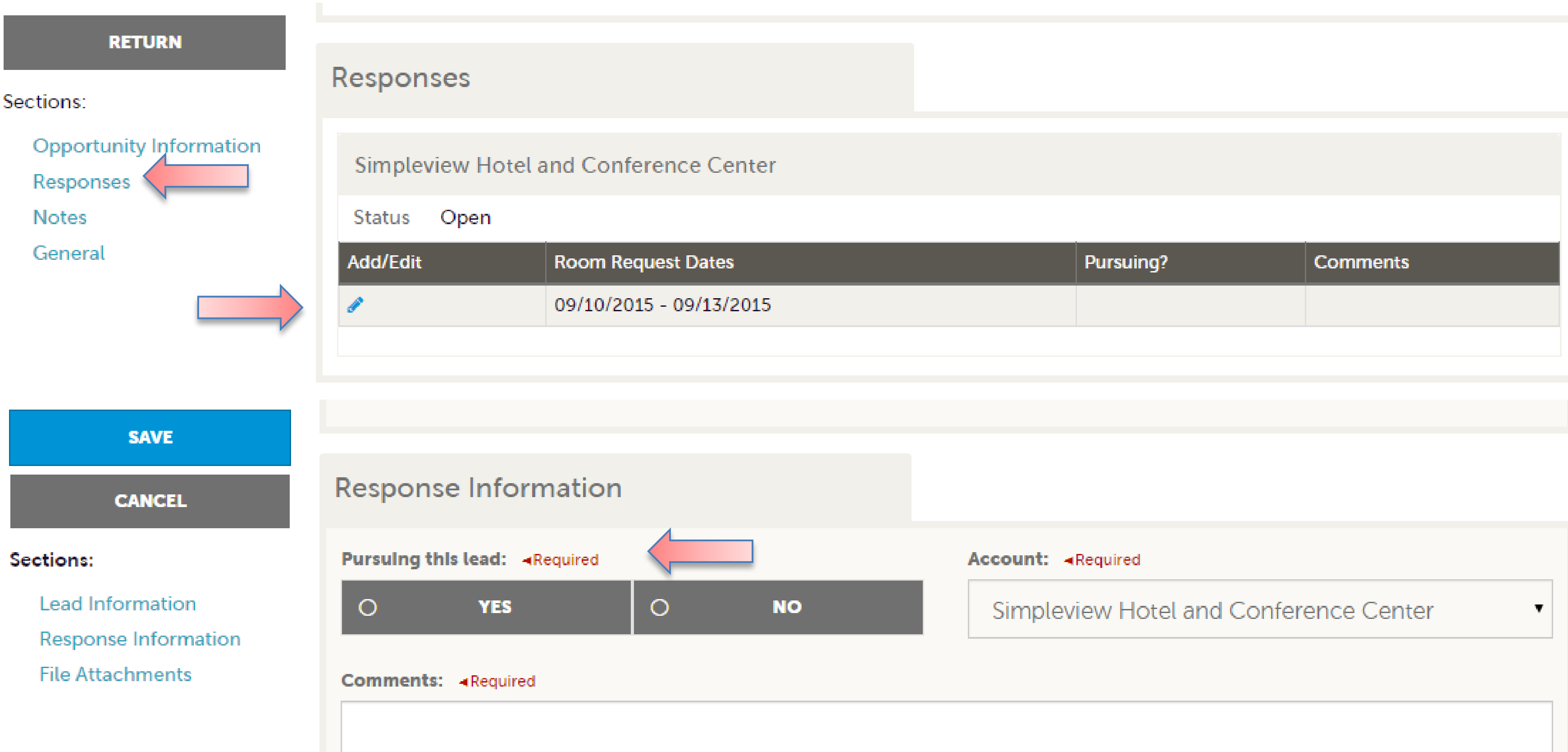
Opportunities – Media Leads



By clicking the RFP icon and then selecting Media Leads, you can view leads sent to your property by the CVA's Media/PR department. These are usually requests for hosting travel writers. These leads can be responded to by viewing the lead. See next slide for responding.

Note: Media Leads function the same as Sales and Tour Leads including their statuses. See RFP – RFPs section for more details on this.

Opportunities – Media Leads (cont'd)



As with Sales and Tour leads you can also respond or edit an existing response to Media Leads by scrolling to the Responses section and clicking the Pencil icon. Within responses you are also able to specify if you are pursuing the business and add attachments.

Filters

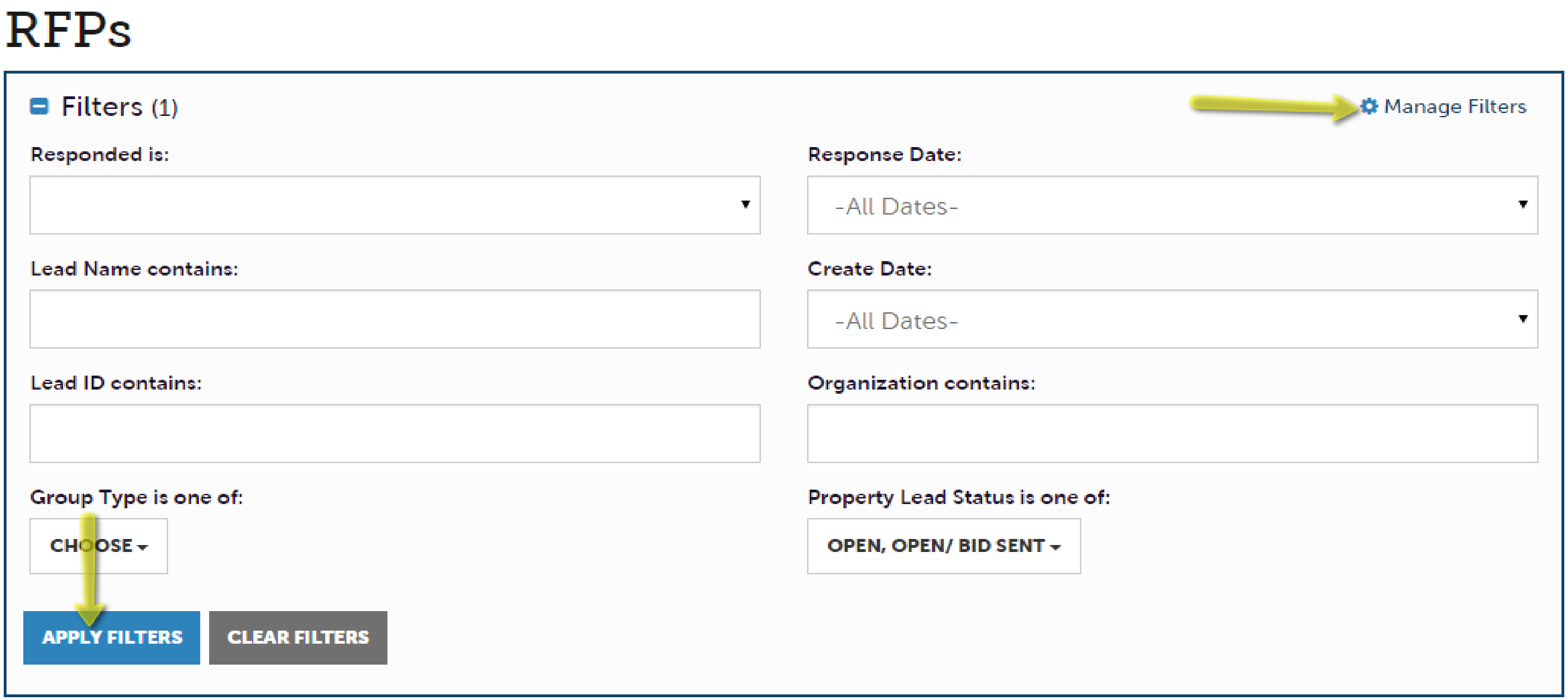
Let’s take a moment to discuss settings that you can customize for your own unique experience in the Partner Portal 4.0. Below is a list of a few things you have control to change for yourself. Other colleagues may have different settings.

1. **Filters** – On many pages of the extranet, you will see a Filters section. This section allows you to narrow down the results you may see on the page. You can update your default filters 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. A data grid displays a list of records matching the criteria you specified in the filters. You can update your default column heading in data grids by clicking the Sprocket icon in the top right corner of the data grid.

3. **Update your Filters and Data Grids** – As just mentioned, you can customize your filters and data grids. When doing so you will have the ability to add or remove filters and column headings as well as choose the default values and ordering.

Filters (Cont'd)



Here is an example of the RFPs filter page. Once you have entered your filters click the Apply Filters button to see your results. To customize this page, click the Manage Filters option in the top right corner.

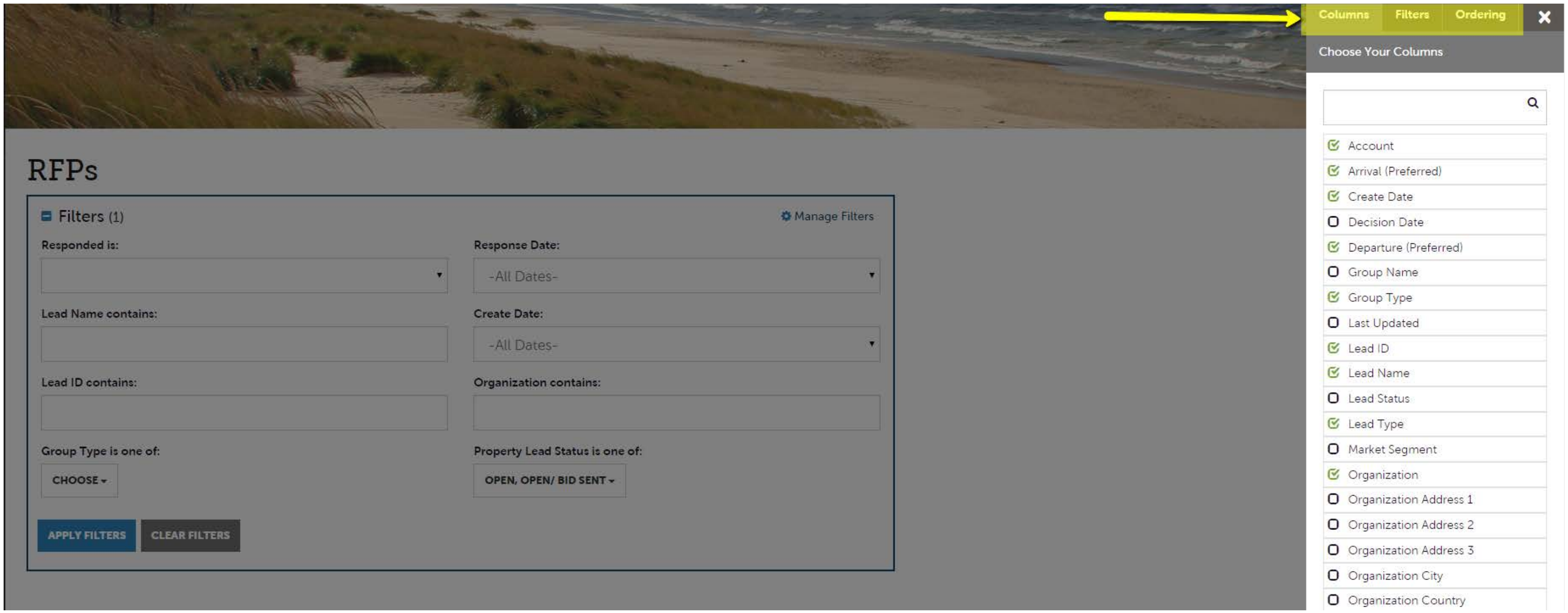
Filters (Cont'd)

Once you have applied your filters, the data grid will update with the matching results. Within each data grid you may see several icons to the left of each record depending upon the page you are viewing. These icons are…

1. **Pencil** – this allows you to edit the record
2. **Eyeball** – this allows you to view the record
3. **Clone** – this allows you to duplicate the record
4. **Add Button** - Depending on the page, you may see an Add button to the top left of the data grid. When this option is available, click the button to add a new record.

- Notice the Sprocket icon in the top right corner. This is to customize your data grids as explained on the next page.

Filters (Cont'd)



As mentioned above, you can customize your filters and data grids as you prefer. When clicking on the mentioned settings options, you will be presented with a menu on the right. Here is where you can personalize your filters, data grid columns, and ordering. By changing these options, you are only changing them for yourself. A fellow colleague may have different settings.