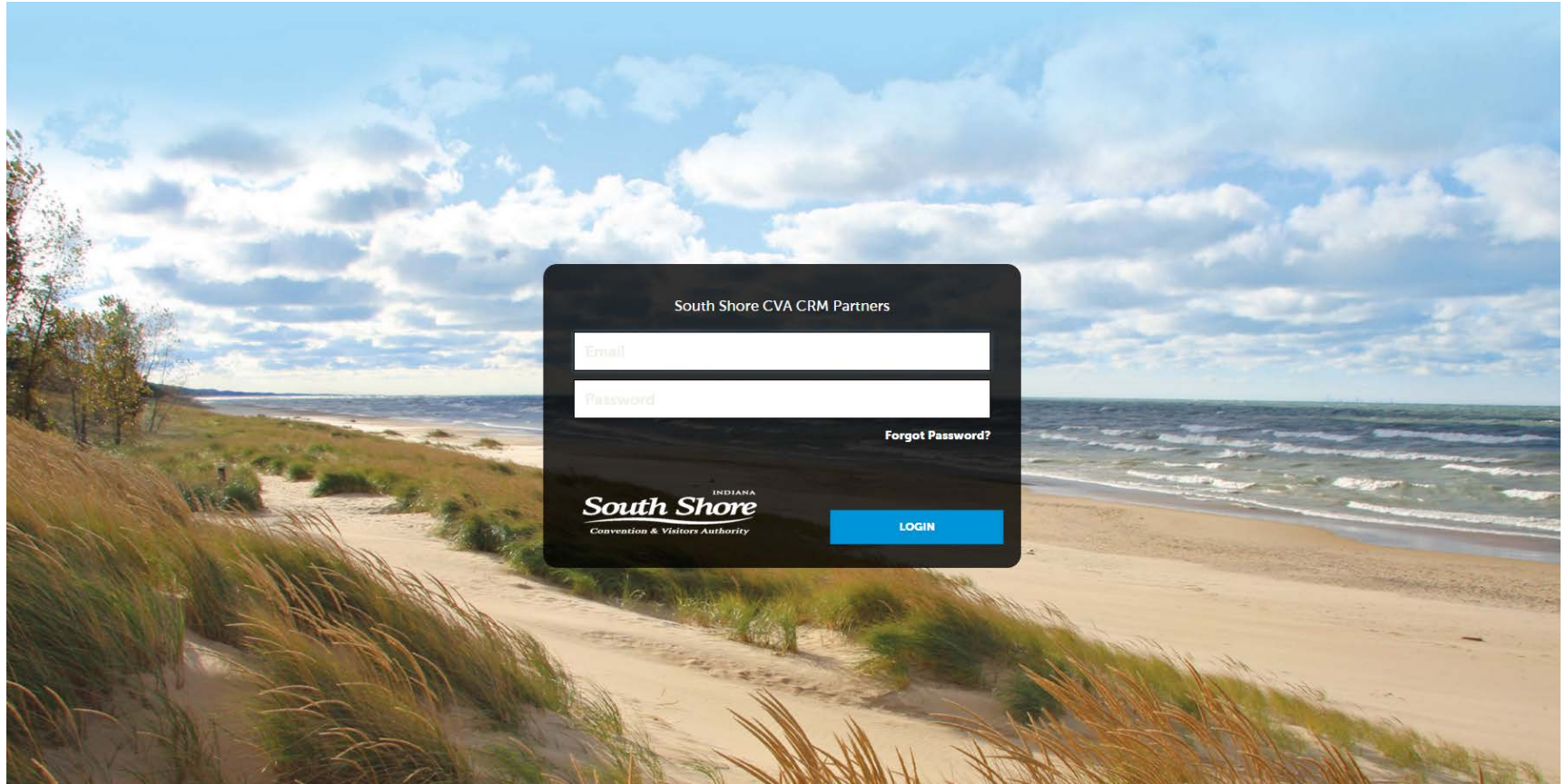


Partner Portal 4.0

User Instructions

Login Screen



Home Screen

South Shore Network
Extranet South Shore CVA CRM Partners
crowak@southshorecva.com Logout South Shore Convention & Visitors Authority

GOS Branding Your Business
Gosser Corporate Sales Inc. Corporate Logo Wear & Promotional Products
219-808-9888 www.gossercorpsales.com

ROSE PAY IT FORWARD Honor employees who make a difference every day! CLICK HERE

Let us transform your great idea into a reality! **architects**
16125 LaSalle St., South Holland, Illinois
708-339-3300 www.jmaarchitects.com

At A Glance See All

At A Glance	See All
2 Listing Views	1 Listing Click-Throughs
0 Offer Views	

Partner Bulletins All Bulletins

Post Board

- JMA Architects
Allison Maciejewski
02/03/2016
A huge thank you to everyone who helped make Partnership Summit 2016 a success yesterday! The marketing/tech talk and social media presentations were extremely valuable. It was great meeting so many new people -- so many who had just completed renovations! Please keep JMA Architects in mind if you have any upcoming renovation/interior projects or new construction coming up! We are eager to help the partners of South Shore CVA succeed!
Read More
- PanoramaNOW
Ms. Sue Baxter
02/03/2016
Did You Know that PanoramaNOW went Mobile with entirely Brand New Software?

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)

South Shore Convention & Visitors Authority

Extranet | South Shore CVA CRM Partners | cnowak@southshorecva.com | Logout | South Shore Convention & Visitors Authority

GCS Gosser Corporate Sales Inc. 219-808-9888 www.gossercorpsales.com

Branding Your Business Corporate Logo Wear & Promotional Products

ROSE PAY IT FORWARD Honor employees who make a difference every day! [CLICK HERE](#)

Let us transform your great idea into a reality! **architects** 16125 LaSalle St., South Holland, Illinois 708-339-3900 • www.jmaarchitects.com

At A Glance [See All](#)

- 2 Listing Views
- 1 Listing Click Throughs
- 0 Offer Views

Partner Bulletins [All Bulletins](#)

Post Board

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[Read More...](#)
- PanoramaNOW**
Ms. Sue Baxter
02/03/2016

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)

South Shore Convention & Visitors Authority

Extranet | South Shore CVA CRM Partners

cnowak@southshorecva.com | Logout | South Shore Convention & Visitors Authority

GGS Corporate Sales Inc. **Branding Your Business**
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Corporate Logo Wear & Promotional Products

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Honor employees who make a difference every day!
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Let us transform your great idea into a reality!
JMA Architects
16125 LaSalle St., South Holland, Illinois
708-339-3900 • www.jmaarchitects.com

At A Glance [See All](#)

- 1 Listing Views
- 1 Listing Click Throughs
- 0 Offer Views

Partner Bulletins [All Bulletins](#)

Partner News February 9, 2016
Partnership Summit Recap, Restaurant Week and more.
[View Full](#)

Post Board

- PanoramaNOW**
Ms. Sue Baxter
02/11/2016
It's Almost HERE!
Send us Your Valentines Info! We have a separate Page just for Valentines DAY!
WE expect alot of visits within the next few days!
Send info to panoramanow@comcast.net
Thanks
Susie Young Baxter
- JMA Architects**
Allison Maciejewski
02/03/2016
A huge thank you to everyone who helped make Partnership Summit 2016 a success yesterday! The marketing/tech talk and social media presentations were extremely valuable. It was great meeting so many new people -- so many who had

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

Home Screen (cont'd)

South Shore Convention & Visitors Authority

Extranet South Shore CVA CRM Partners

cnowak@southshorecva.com Logout South Shore Convention & Visitors Authority

Member Profile
Manage your Accounts

- Accounts
- Contacts
- My Benefits

Branding Your Business
Corporate Logo Wear & Promotional Products

PAY IT FORWARD
Honor employees who make a difference every day!
[CLICK HERE](#)

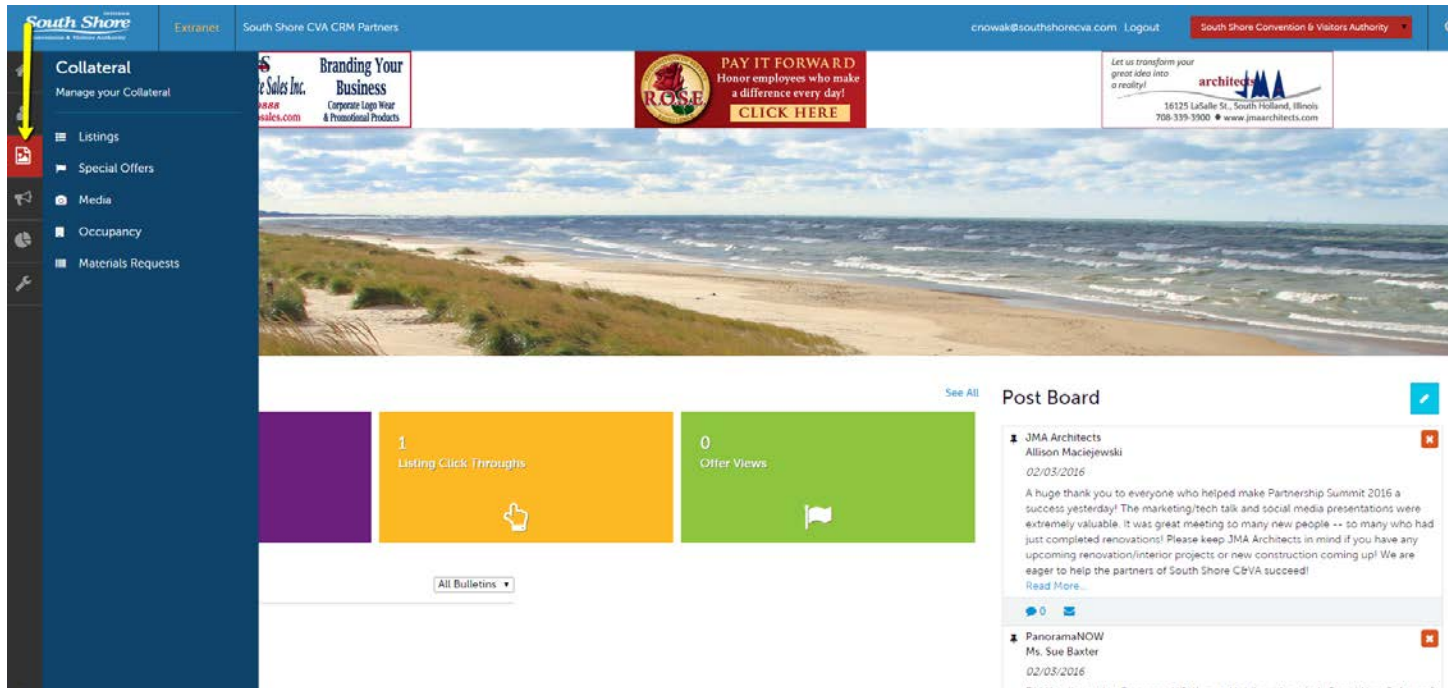
Let us transform your great idea into a reality!
architects
18125 LaSalle St., South Holland, Illinois
708-339-3900 • www.jmaarchitects.com

Post Board

- JMA Architects**
Allison Maciejewski
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[Read More...](#)
- PanoramaNOW**
Ms. Sue Baxter
02/03/2016
Did You Know that PanoramaNOW went Mobile with entirely Brand New Software?

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.

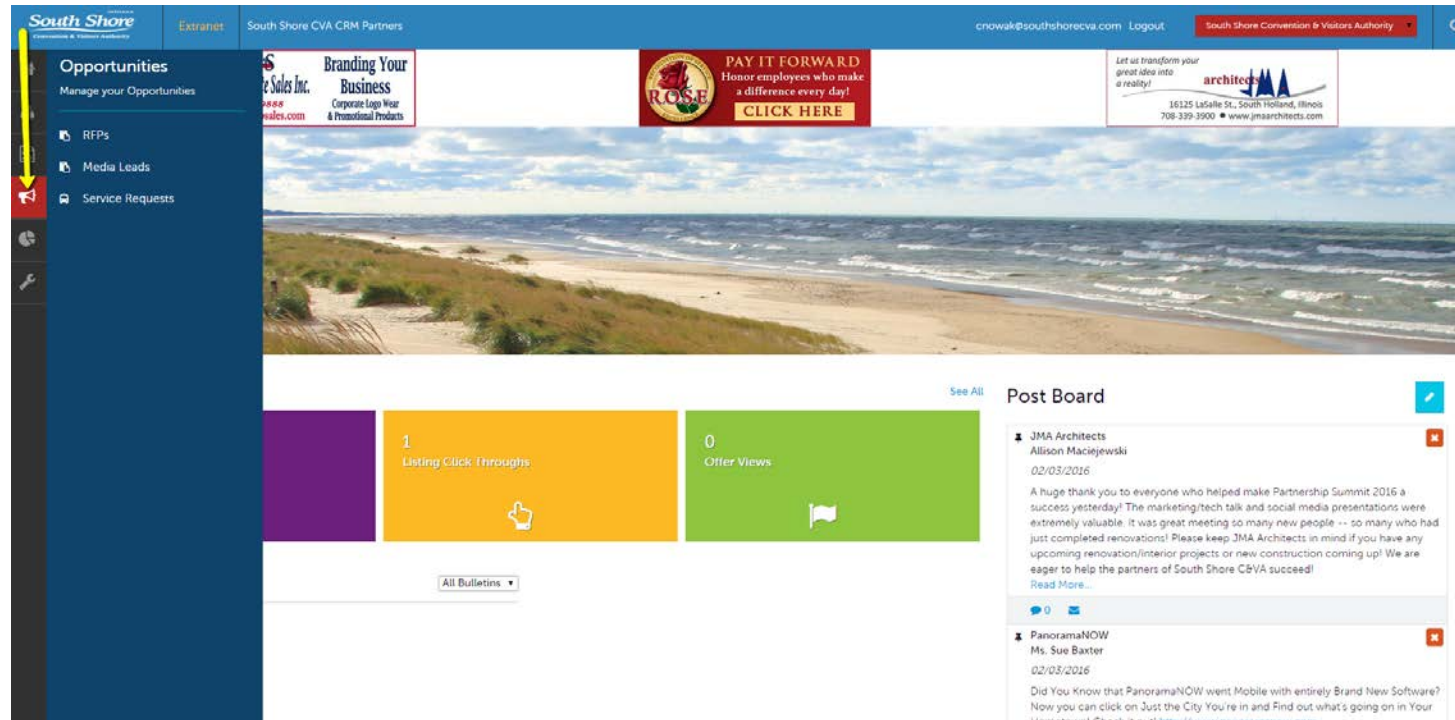
Home Screen (cont'd)



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.

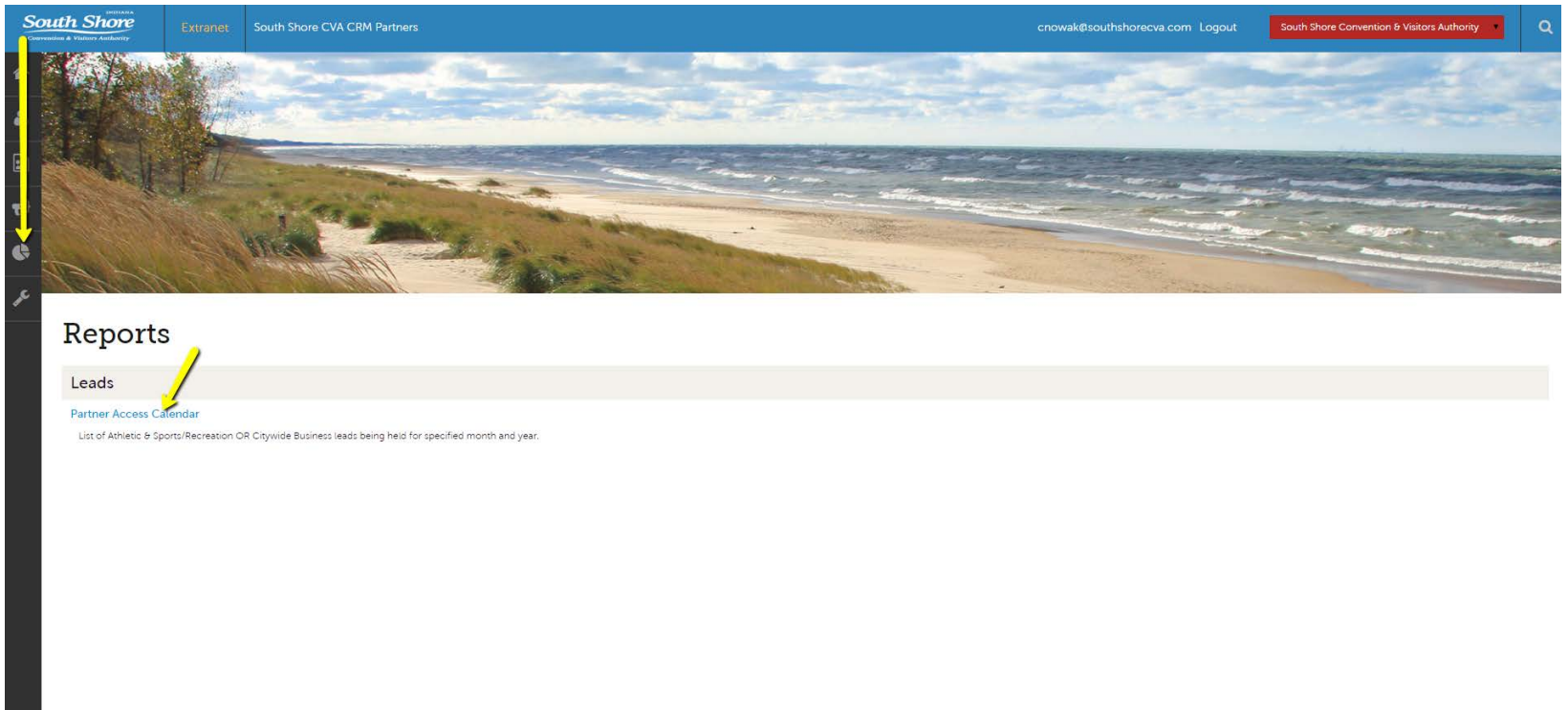
Note: Some of these options are just view, edit and/or add. More on these options later in the presentation.

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

South Shore
Convention & Visitors Authority

Extranet

South Shore CVA CRM Partners

cnwak@southshorecva.com Logout

South Shore Convention & Visitors Authority

Accounts

Filters (0) [Manage Filters](#)

Status is one of:

CHOOSE ▾

[APPLY FILTERS](#)

Page 1 of 1 Go to Page: 1

Actions	Account
✎ 👁 ▾	South Shore Convention & Visitors Authority

Page 1 of 1 Go to Page: 1

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)

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 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

South Shore
COMMERCIAL & TOURISM AUTHORITY

Extranet | South Shore CVA CRM Partners

cnorwak@southshorecva.com | Logout | South Shore Convention & Visitors Authority

Contacts

Filters (0) [Manage Filters](#)

Account is one of:

Contact Type is one of:

[APPLY FILTERS](#)

[ADD CONTACT](#)

Actions	Full Name	Account	Title	Email	Contact Type
Add Edit Clone	Indiana Welcome Center	South Shore Convention & Visitors Authority			Secondary
Add Edit Clone	Indiana Welcome Center	South Shore Convention & Visitors Authority			Secondary

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)

South Shore
Convention & Visitors Authority

Extranet South Shore CVA CRM Partners

cnwalk@southshorecva.com | Logout

South Shore Convention & Visitors Authority

Update Contact

SAVE

CANCEL

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- General

Contact Information

Account: *Required
South Shore Convention & Visitors Authority

First Name: *Required
Indiana Welcome Center

Last Name: *Required
Indiana Welcome Center

Full Name: *Required
Indiana Welcome Center

Department:

Title:

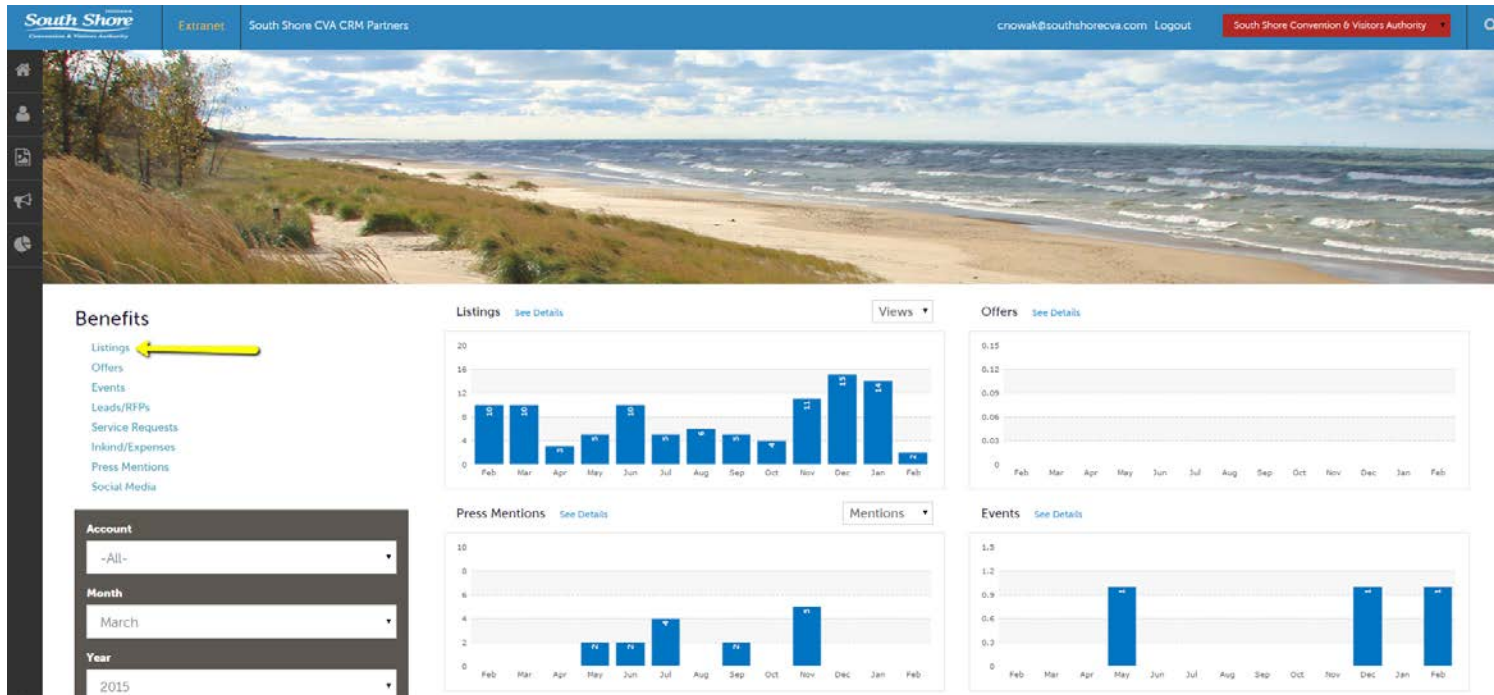
Contact Type: *Required
Secondary

Preferred Contact Method:
Email

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!*

IMPORTANT NOTE: 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

South Shore
Convention & Visitors Authority

Extranet South Shore CVA CRM Partners

cnowak@southshorecva.com Logout South Shore Convention & Visitors Authority

Listings

[Filters \(0\)](#) [Manage Filters](#)

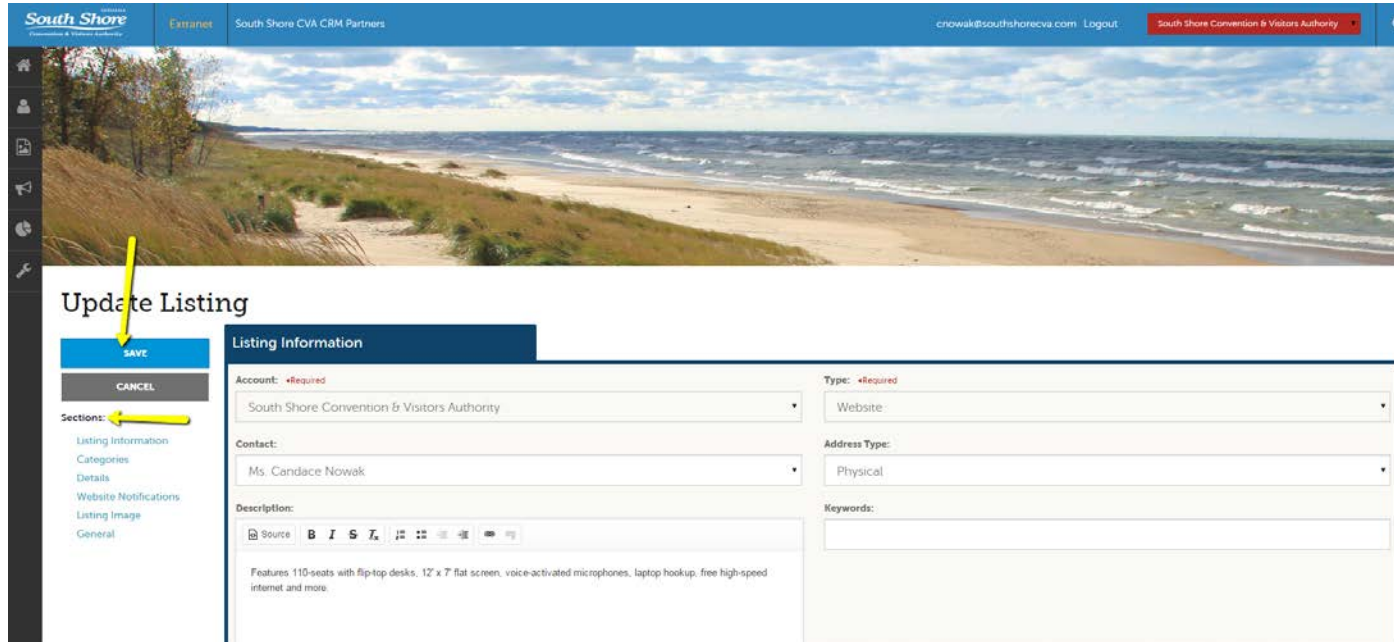
You have not added any filters. You can click the manage filters link in the top right corner or click the icon from the grid to add filters from the available list and set a default value to use in the future.

Actions	Company	Listing Type	Category	SubCategory	Listing ID
	South Shore Convention & Visitors Authority	Website	Visitor Resources/Services	Meeting and Convention Services	356

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 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)



South Shore
Convention & Visitors Authority

Extranet South Shore CVA CRM Partners

cnowak@southshorecva.com Logout South Shore Convention & Visitors Authority

Update Listing

SAVE

CANCEL

Sections:

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

Listing Information

Account: *Required
South Shore Convention & Visitors Authority

Type: *Required
Website

Contact:
Ms. Candace Nowak

Address Type:
Physical

Description:
Features 110-seats with flip-top desks, 12' x 7' flat screen, voice-activated microphones, laptop hook-up, free high-speed internet and more.

Keywords:

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)

SAVE

CANCEL

Sections:

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

☐ TOLL FREE

800-255-5253

Website Notifications


Email To Notify:

Notification Interval:

0

Listing Image

Select one or more images



South Sh
tion & Visitors Au

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

South Shore
Convention & Visitors Authority

Extranet South Shore CVA CRM Partners crowsal@southshorecva.com Logout South Shore Convention & Visitors Authority

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

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending
No Records Were Found						

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. You can also create a new offer by clicking the Add Offer button.

Collateral – Special Offers (cont'd)

New Offer

SAVE

CANCEL

Sections:

- Offer Information
- Offer Image
- Offer Dates
- Offer Categories
- Offer Listings

Offer Information

Account: *Required

South Shore Convention & Visitors Authority

Offer Title: *Required

Offer Link:

Offer Text:

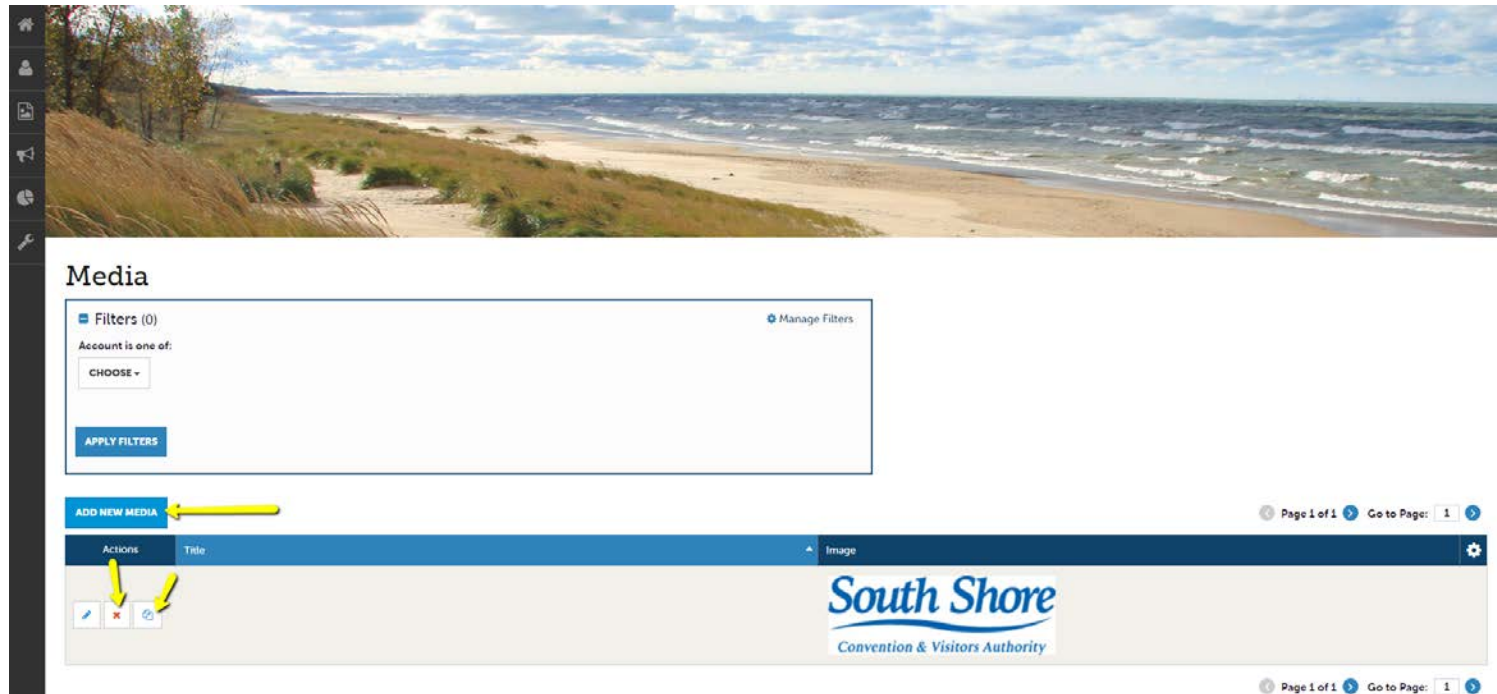
Offer Image

There are no images available to choose

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)

New Media

Media Information

Account: *Required
South Shore Convention & Visitors Authority

Title: *Required

Type: *Required
Image

Sort Order:

Description:

File:

Drag and Drop File To Page
or use the "Browse" button below to find a file to add

BROWSE REMOVE

You can drag a file to the page to replace this file or use the "Browse" button

Listings: *Required
CHOOSE AMONG THE FOLLOWING...

Listings is required

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

The screenshot shows the 'Materials Requests' interface. At the top is a blue header with the 'South Shore' logo, 'Extranet' link, 'South Shore CVA CRM Partners' text, email 'cnowak@southshorecva.com', 'Logout' link, and a dropdown for 'South Shore Convention & Visitors Authority'. Below the header is a large banner image of a beach. A left sidebar contains navigation icons. The main content area is titled 'Materials Requests' and includes a filter box with 'Filters (0)', a 'Status is:' dropdown, and an 'APPLY FILTERS' button. Below the filter box is a blue 'ADD MATERIALS REQUEST' button, which is pointed to by a yellow arrow. Underneath is a table with columns: 'Actions', 'Order ID', 'Send Date', 'Full Name', 'Company', 'City/State/Zip', and 'Items Ordered'. The table currently shows 'No Records Were Found'. Pagination controls at the bottom right indicate 'Page 1 of 1' and 'Go to Page: 1'.

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)

SAVE

CANCEL

Sections:

- Materials Request
- Information Attached To
- Order Recipient
- Order Address
- Order Detail

Company: *Required
South Shore Convention & Visitors Authority

Phone:
219-989-7770 Ext

Fax:
219-989-7777 Ext

Email:
cnowak@southshorecva.com

Order Address

Address 1: *Required
7770 Corinne Drive

Address 2:

Address 3:

City: *Required
Hammond

State: *Required
Indiana

Zip: *Required
46323

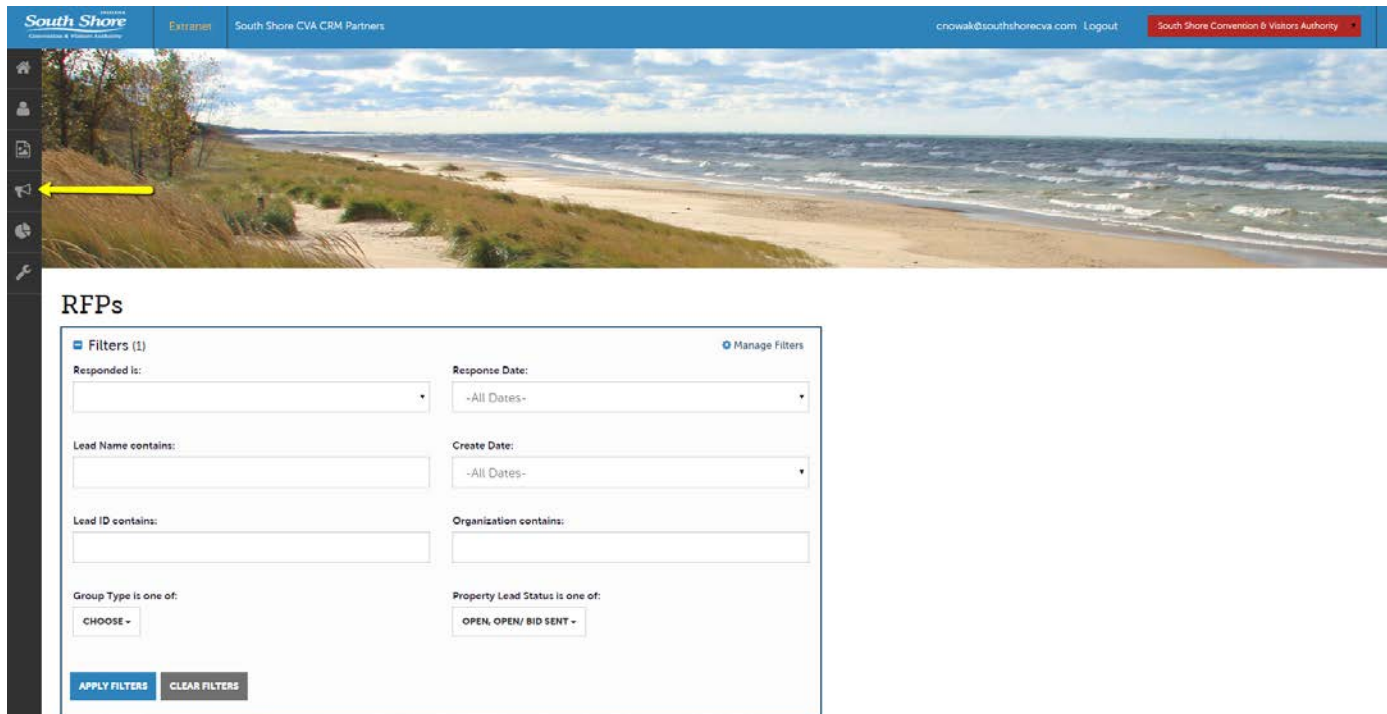
Country: *Required
UNITED STATES

Order Detail

Image	Product	Price	Qty	Available
	ROSE Awards Rack Cards	\$0.00	0	46000
	2015 - 2016 Visitor Guide	\$0.00	0	57751

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



The screenshot displays the South Shore CRM Extranet interface. The top navigation bar includes the South Shore logo, 'Extranet', 'South Shore CVA CRM Partners', a user email 'cnwalk@southshorecva.com', a 'Logout' link, and a 'South Shore Convention & Visitors Authority' dropdown. A large banner image of a beach is at the top. On the left, a vertical sidebar contains several icons; a yellow arrow points to the RFP icon. Below the banner, the 'RFPs' section is active, showing a 'Filters (1)' panel with a 'Manage Filters' link. The filter panel includes fields for 'Responded Is:', 'Response Date:', 'Lead Name contains:', 'Create Date:', 'Lead ID contains:', 'Organization contains:', 'Group Type is one of:', and 'Property Lead Status is one of:'. At the bottom of the filter panel are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons.

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)

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. For the Notes section, see next slide.


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 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)

The screenshot displays a web interface for responding to an RFP. 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'. The 'File Attachments' section is highlighted with a red arrow. The main content area shows a table with two rows: 'Total' and 'Requested', each with five columns of zeros. Below the table is a 'File Attachments' section with a blue 'ATTACH FILE' button and the text 'or drag files to the page'. A red arrow points to the 'ATTACH FILE' button. Below this is a light blue box with the text 'No files have been attached'.

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

File Attachments

ATTACH FILE or drag files to the page

No files have been attached

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

All Media Leads

Filters (0) [Manage Filters](#)

Responded is: Status is one of:

APPLY FILTERS

Page 1 of 1 Go to Page:

Actions	Lead ID	Lead Name	Account	Lead Type	Response Date	Arrival	Departure	
	1033	2014 Media Lead	Simpleview Hotel and Conference Center	Article	05/10/2014	05/29/2014	10/15/2015	

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)

RETURN

Sections:

Opportunity Information

Responses

Notes

General

SAVE

CANCEL

Sections:

Lead Information


Response Information

File Attachments

Responses

Simpleview Hotel and Conference Center

Status Open

Add/Edit	Room Request Dates	Pursuing?	Comments
	09/10/2015 - 09/13/2015		

Response Information

Pursuing this lead: Required

☐ YES ☐ NO

Account: Required

Simpleview Hotel and Conference Center

Comments: Required

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.

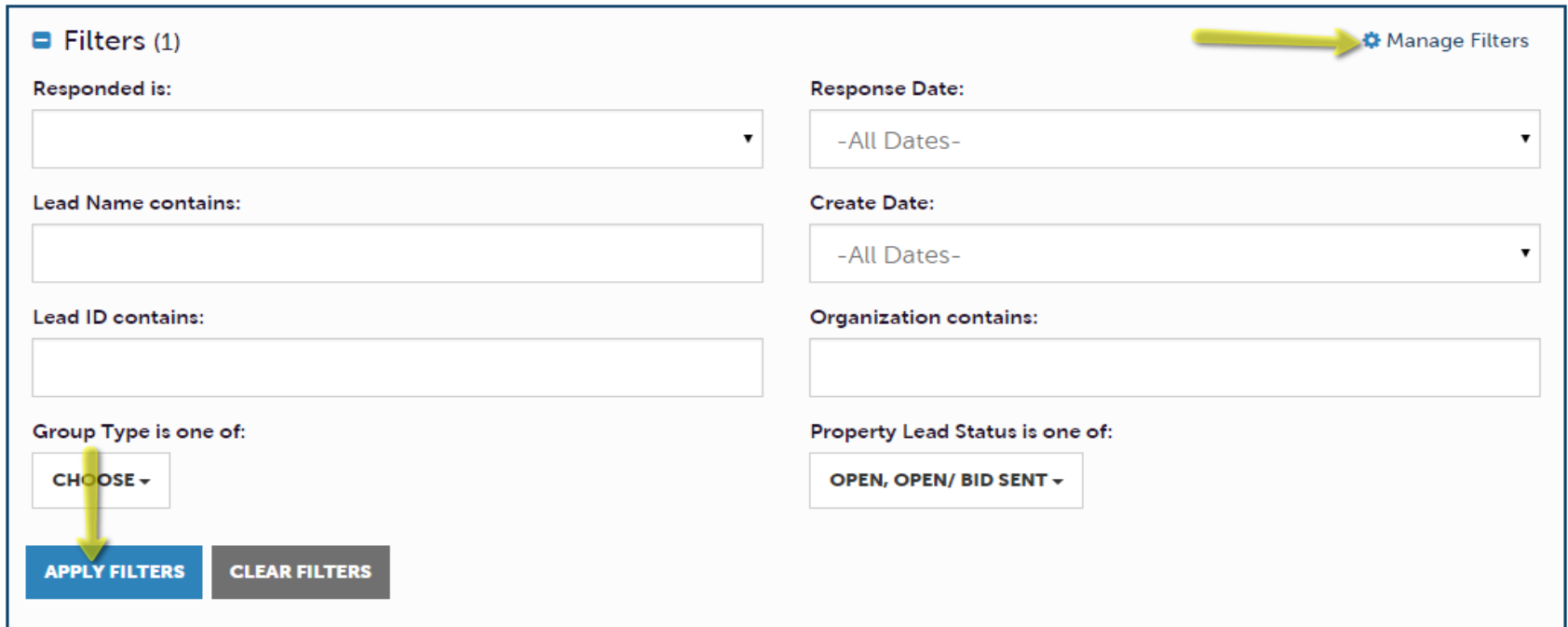
Filters

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)

RFPs



The screenshot shows a filter interface for RFPs. At the top left, there is a header "Filters (1)" with a minus icon. In the top right corner, there is a "Manage Filters" link with a gear icon, highlighted by a yellow arrow. The filter area is divided into two columns. The left column contains: "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 contains: "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 "Property Lead Status is one of:" with a dropdown menu showing "OPEN, OPEN/ BID SENT". At the bottom left, there are two buttons: "APPLY FILTERS" (blue) and "CLEAR FILTERS" (grey). A yellow arrow points from the "CHOOSE" dropdown to the "APPLY FILTERS" button.

Filters (1) [Manage Filters](#)

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

CHOOSE

Response Date:

Create Date:

Organization contains:

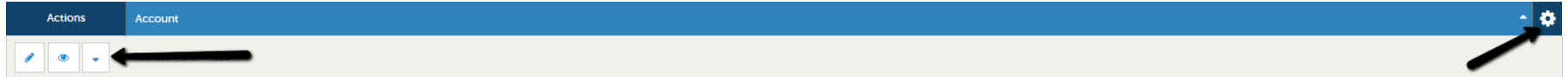
Property Lead Status is one of:

OPEN, OPEN/ BID SENT

APPLY FILTERS **CLEAR FILTERS**

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.

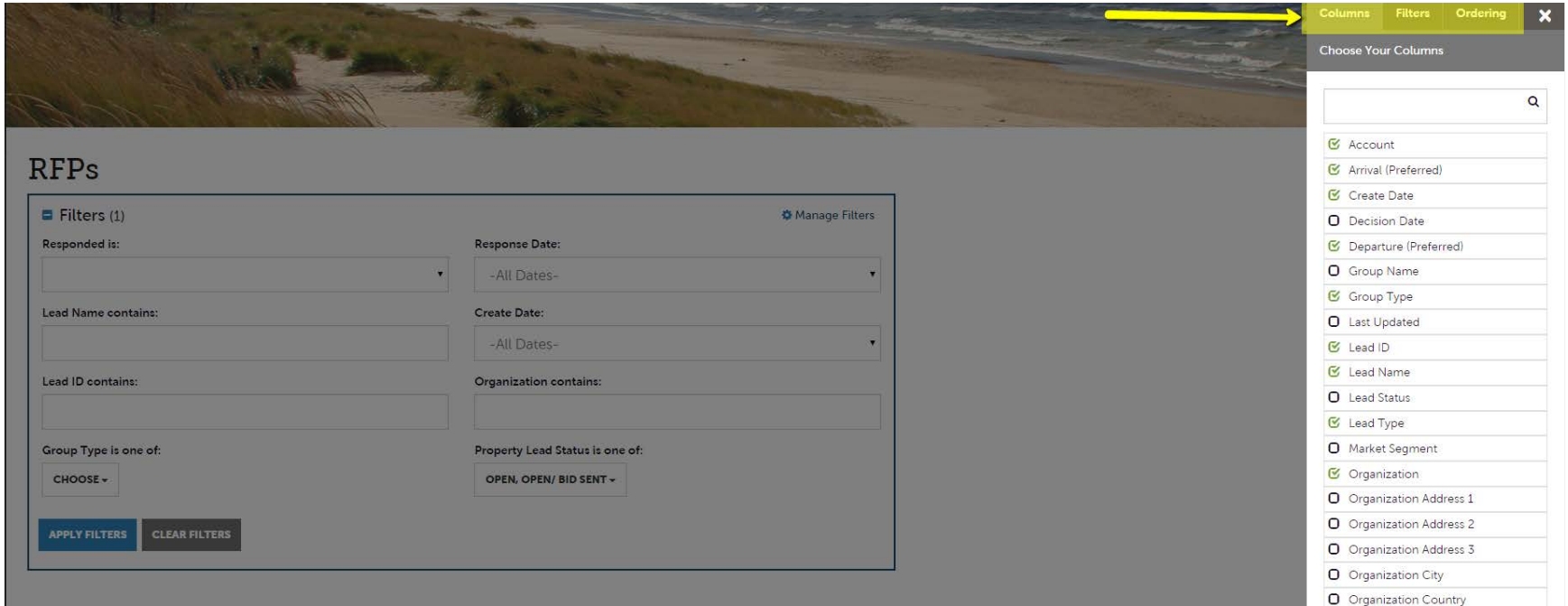
Filters (Cont'd)



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)



The screenshot displays the 'RFPs' filters interface. On the right, a top navigation bar contains 'Columns', 'Filters', and 'Ordering' tabs, with a yellow arrow pointing to the 'Columns' tab. Below this is a 'Choose Your Columns' panel with a search bar and a list of columns, each with a checkbox. The main area on the left is titled 'Filters (1)' and includes a 'Manage Filters' link. It contains several filter sections: 'Responded is:' with a dropdown, 'Response Date:' with a date range dropdown, 'Lead Name contains:', 'Create Date:', 'Lead ID contains:', 'Organization contains:', 'Group Type is one of:' with a 'CHOOSE' dropdown, and 'Property Lead Status is one of:' with an 'OPEN, OPEN/ BID SENT' dropdown. At the bottom are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons.

RFPs

Filters (1) [Manage Filters](#)

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Property Lead Status is one of:

Columns **Filters** **Ordering**

Choose Your Columns

- ☒ Account
- ☒ Arrival (Preferred)
- ☒ Create Date
- ☐ Decision Date
- ☒ Departure (Preferred)
- ☐ Group Name
- ☒ Group Type
- ☐ Last Updated
- ☒ Lead ID
- ☒ Lead Name
- ☐ Lead Status
- ☒ Lead Type
- ☐ Market Segment
- ☒ Organization
- ☐ Organization Address 1
- ☐ Organization Address 2
- ☐ Organization Address 3
- ☐ Organization City
- ☐ Organization Country

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.