

# Visit Huntington Beach Partner Portal Training Guide

## Managing your profile: Accounts, Contacts, and Benefits

### Where to access the Partner Portal:

<https://SurfCityUSA.Extranet.SimpleviewCRM.com/login/>

You can also access this link at the bottom of any page on SurfCityUSA.com by clicking “**Partner Portal Login**”.



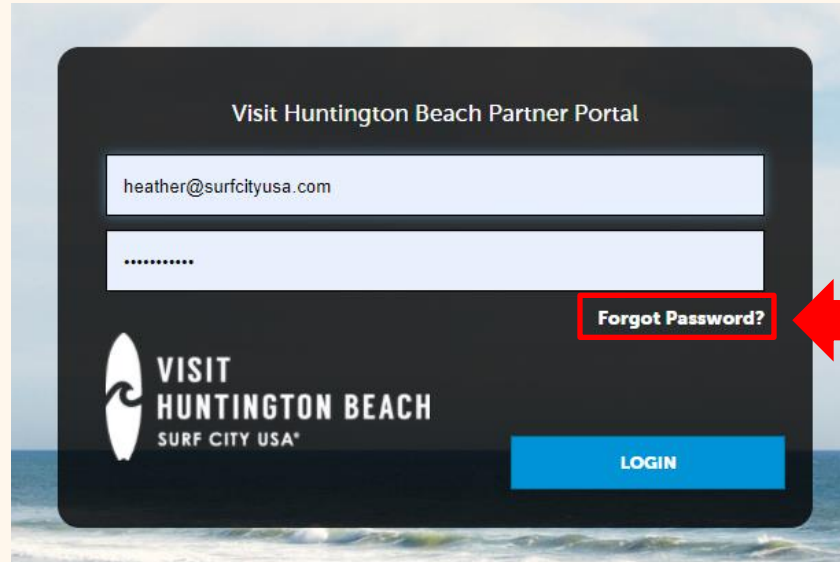
The screenshot shows the footer of the Visit Huntington Beach website. On the left is the logo for Visit Huntington Beach, Surf City USA. In the center, contact information is provided: 155 Fifth Street, Suite 111, Huntington Beach, CA 92648-5171, phone numbers 714.969.3492 and 800.729.6232, and email info@surfcityusa.com. Below this are social media icons for Facebook, Twitter, Instagram, Pinterest, and YouTube. On the right, a vertical menu lists: MEETING PLANNERS, TRAVEL TRADE, FILM, MEDIA, PARTNERS, EVENT SPONSORSHIPS, and PARTNER PORTAL LOGIN. A red box highlights the 'PARTNER PORTAL LOGIN' link, and a red arrow points to it from the right.

[ABOUT US](#) | [CONTACT](#) | [SITE MAP](#) | [PRIVACY POLICY](#) | [WEB ACCESSIBILITY](#)

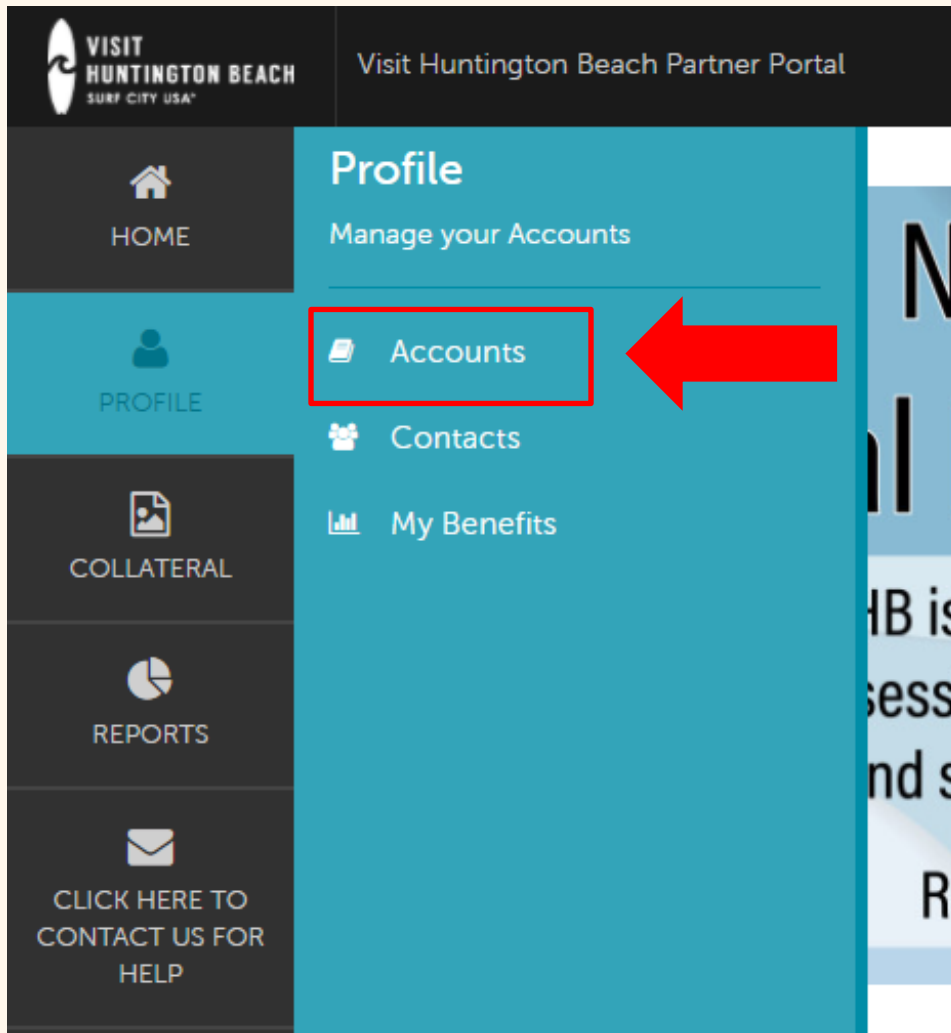


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## Don't know your login info?



Try using the “**Forgot Password**” option to have your password reset and emailed to you. If you don't know the email account that was used to create your account, email [Heather@SurfCityUSA.com](mailto:Heather@SurfCityUSA.com) for assistance.



## Managing Your Profile

Clicking the **Profile** icon displays a partner's information, such as account details, contacts, and information about interactions with Visit Huntington Beach.

From here you have the option to edit account information, view contacts, and view certain benefits.

### **Account information that can be updated includes:**

- Website
- Business Email
- Business Phone Numbers
- Addresses
- Social Media Accounts

# View Your Account

Visit Huntington Beach Partner Portal

heather@surfcityusa.com Logout Visit Huntington Beach

## Accounts


Filters (0) Manage Filters

Status is one of:

CHOOSE -

APPLY FILTERS

Page 1 of 1 Go to Page: 1

Actions	Account
	Visit Huntington Beach

Page 1 of 1 Go to Page: 1

After clicking the **Accounts** button, click the **blue eye icon** under Actions. This will take you to view the Account Details screen.

If you see multiple account names, this is due to your Partner Portal account being associated with multiple businesses. If the accounts shown here are incorrect, please contact [Heather@SurfCityUSA.com](mailto:Heather@SurfCityUSA.com).

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## Account Details

[EDIT](#) [RETURN](#)

Sections:

- [Account Information](#)
- [Phone Information](#)
- [Address Information](#)
- [Social Media](#)

Related Details:

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

Account Information

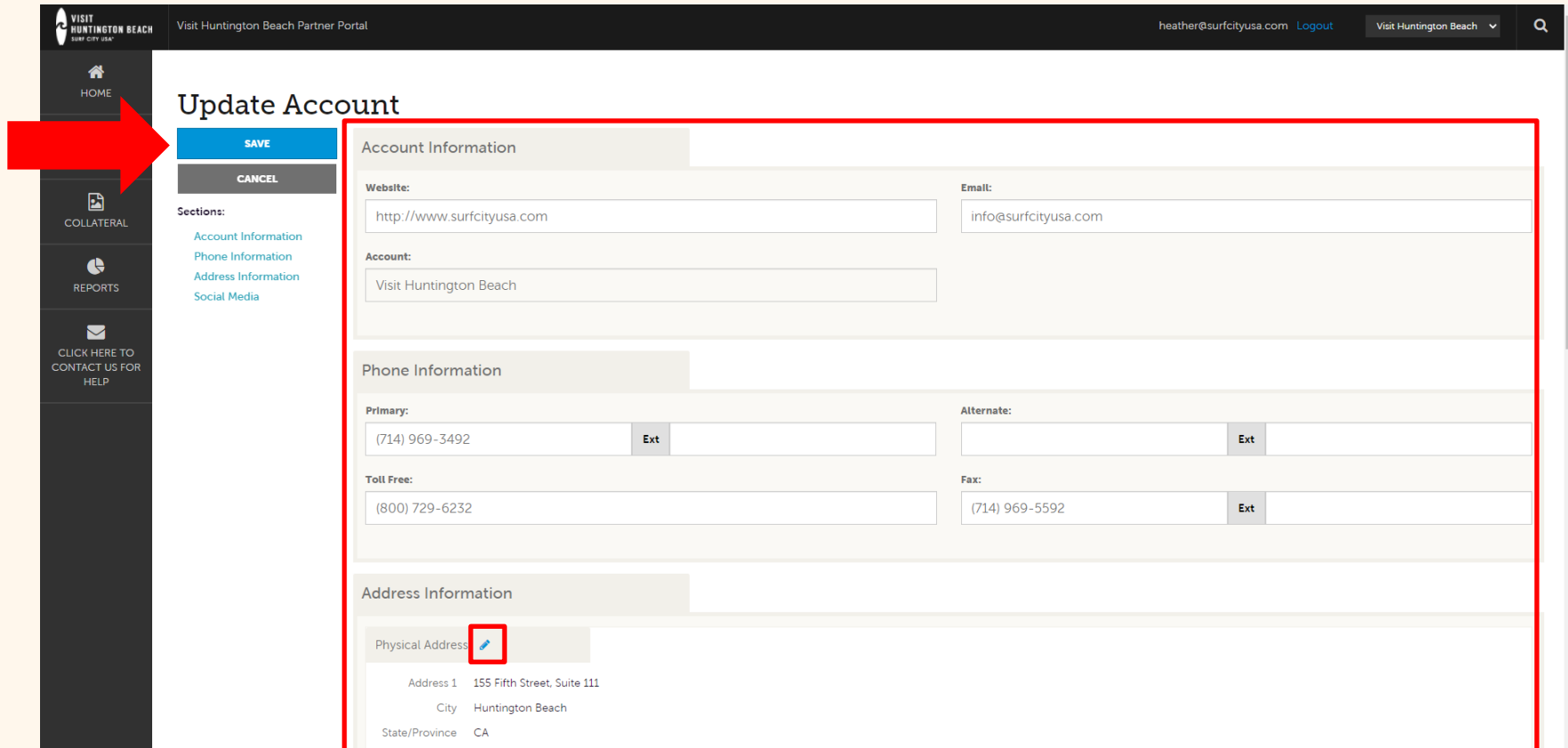
To manage your profile images go to Collateral > Media in the left hand navigation.

Status	Active
Account	Visit Huntington Beach
Extranet Parent	
Region	Downtown
Email	<a href="mailto:info@surfcityusa.com">info@surfcityusa.com</a>
Website	<a href="http://www.surfcityusa.com">http://www.surfcityusa.com</a>

When you view or edit an account you can quickly scroll to a section on the page by clicking the links on the left side of the page.

To make changes to your account, click the blue **Edit** button. You can also edit your account by clicking the blue pencil icon on the previous screen.

# Update Your Account



The screenshot shows the 'Update Account' page in the Visit Huntington Beach Partner Portal. The page has a dark header with the logo and user information. A sidebar on the left contains navigation links: HOME, COLLATERAL, REPORTS, and a help link. The main content area is titled 'Update Account' and contains three sections: Account Information, Phone Information, and Address Information. A red arrow points to the blue 'SAVE' button, and a red box highlights the form fields. A blue pencil icon is visible next to the 'Physical Address' label.

**Account Information**

Website:  Email:


Account:

**Phone Information**

Primary:  Ext:  Alternate:  Ext:

Toll Free:  Fax:  Ext:

**Address Information**

Physical Address 

Address 1: 155 Fifth Street, Suite 111  
City: Huntington Beach  
State/Province: CA

Make any necessary changes and click the blue **Save** button when you are finished. Note that some fields require you to click the blue pencil icon to make changes.

# View Your Contacts

Visit Huntington Beach Partner Portal

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## Contacts

Filters (1) Manage Filters

Account is one of: CHOOSE - Contact Type is one of: PRIMARY -

APPLY FILTERS CLEAR FILTERS

Actions	Full Name	Account	Title	Email	Contact Type
	Nicole Llado	Visit Huntington Beach	Director of Information Technology and Visitor & Partner Services	nicole@surfcityusa.com	Primary
	Kelly Miller	Visit Huntington Beach	President & CEO	kelly@surfcityusa.com	Primary
	Heather Saez	Visit Huntington Beach	Tourism & Partner Services Manager	heather@surfcityusa.com	Primary
	Omark Holmes	Visit Huntington Beach	Chief Marketing Officer	omark@surfcityusa.com	Primary

Page 1 of 1 Go to Page: 1

Click the **Profile** icon in the left navigation then **Contacts** to view the contacts associated with your account. You can use the **blue eye icon** under Actions to view more details about a specific contact.

At this time contacts can only be viewed. If you need to add or remove a contact, email [Heather@SurfCityUSA.com](mailto:Heather@SurfCityUSA.com).

## E-Newsletter Subscriptions

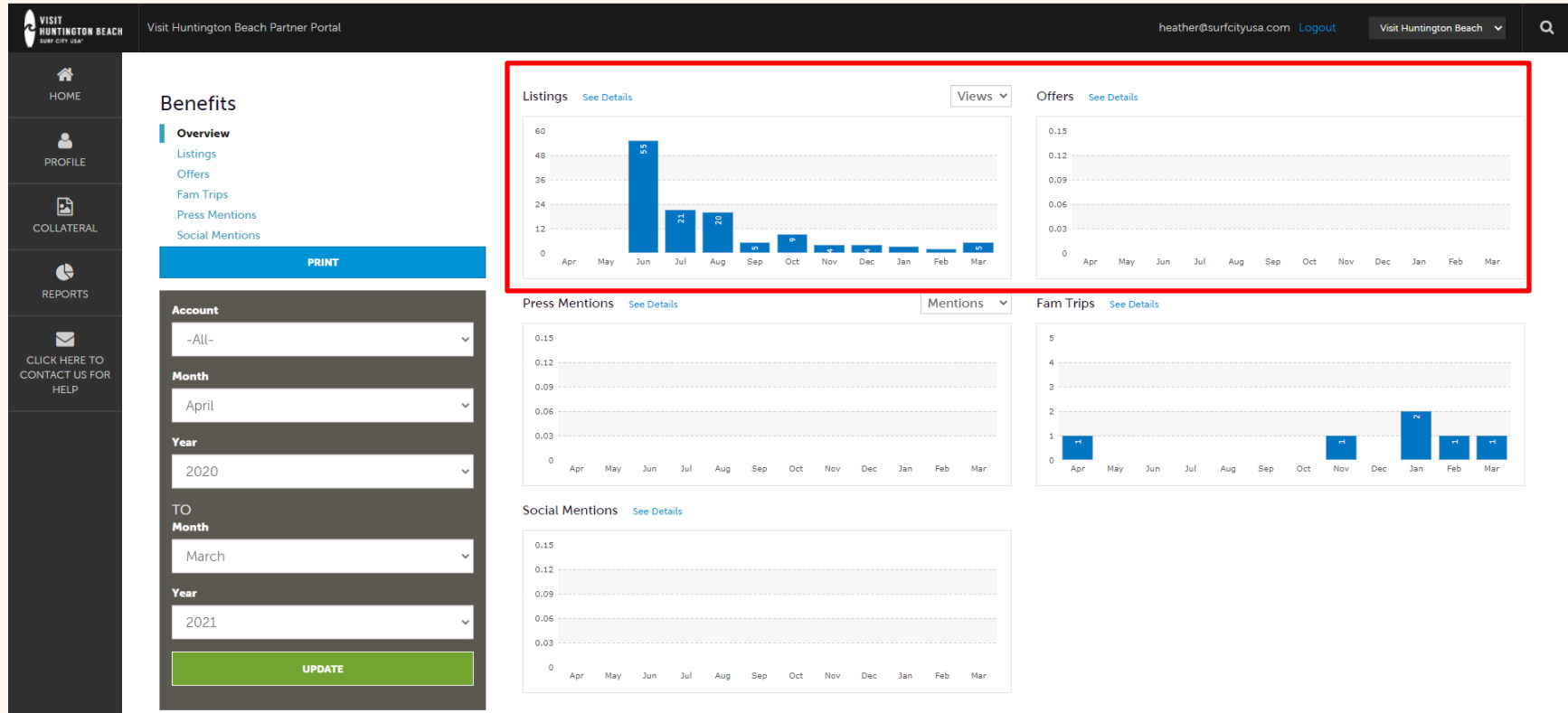
General	
<i>Visit Huntington Beach e-newsletter subscriptions</i>	
eNewsletter - Meeting Planner (Quarterly)	No
eNewsletter - Leisure (Monthly)	No
eNewsletter - Partner (Quarterly)	No
eNewsletter - Film & Sports (Quarterly)	No
eNewsletter - Media (Quarterly)	No

At the bottom of the Contact Details screen, you can see which e-newsletters a specific contact is signed up for. If you want someone on your team to receive a specific newsletter, please email [Heather@SurfCityUSA.com](mailto:Heather@SurfCityUSA.com).

We recommend that all partners sign up for the Partner Newsletter, which includes our bi-weekly CEO newsletter from Visit HB President & CEO Kelly Miller.



# View Your Benefits



Click the **Profile** icon in the left navigation then **My Benefits** to view some of the benefits associated with your account.

At this time, only Listings and Offers are updated by Visit Huntington Beach. We hope to be able to provide you with updated numbers for the other categories in the future.

VISIT HUNTINGTON BEACH  
 SURF CITY USA  
 Visit Huntington Beach Partner Portal  
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HOME  
 COLLATERAL  
 REPORTS  
 CLICK HERE TO CONTACT US FOR HELP

**My Benefits**  
 Overview  
**Listings**  
 Offers  
 Fam Trips  
 Press Mentions  
 Social Mentions

PRINT

**Account**  
 -All-  
**Month**  
 April  
**Year**  
 2020  
**TO**  
**Month**  
 March  
**Year**  
 2021  
 UPDATE

**Listings**  
**Total Views and Clicks**

Month	Views	Clicks
Apr 20	0	0
May 20	0	0
Jun 20	55	1
Jul 20	21	0
Aug 20	20	1
Sep 20	5	0
Oct 20	9	2
Nov 20	4	1
Dec 20	4	1
Jan 21	3	1
Feb 21	2	1
Mar 21	5	0

**Totals**

	Views	Clicks	Conversion Rate
	128	11	8.6%

Group By: Account | Category

**Visit Huntington Beach**

	Views	Clicks	Conversion Rate
Visit Huntington Beach - Website - Shopping - Gifts/Souvenirs	128	11	8.6%
<b>Total</b>	<b>128</b>	<b>11</b>	<b>8.6%</b>

Click **Listings** or **Offers** on the left-hand side of the screen to see details of the section you want to view. From this screen, you can see how many views and clicks your business listing or special offer has received on SurfCityUSA.com.

Questions? Contact [Heather@SurfCityUSA.com](mailto:Heather@SurfCityUSA.com).