



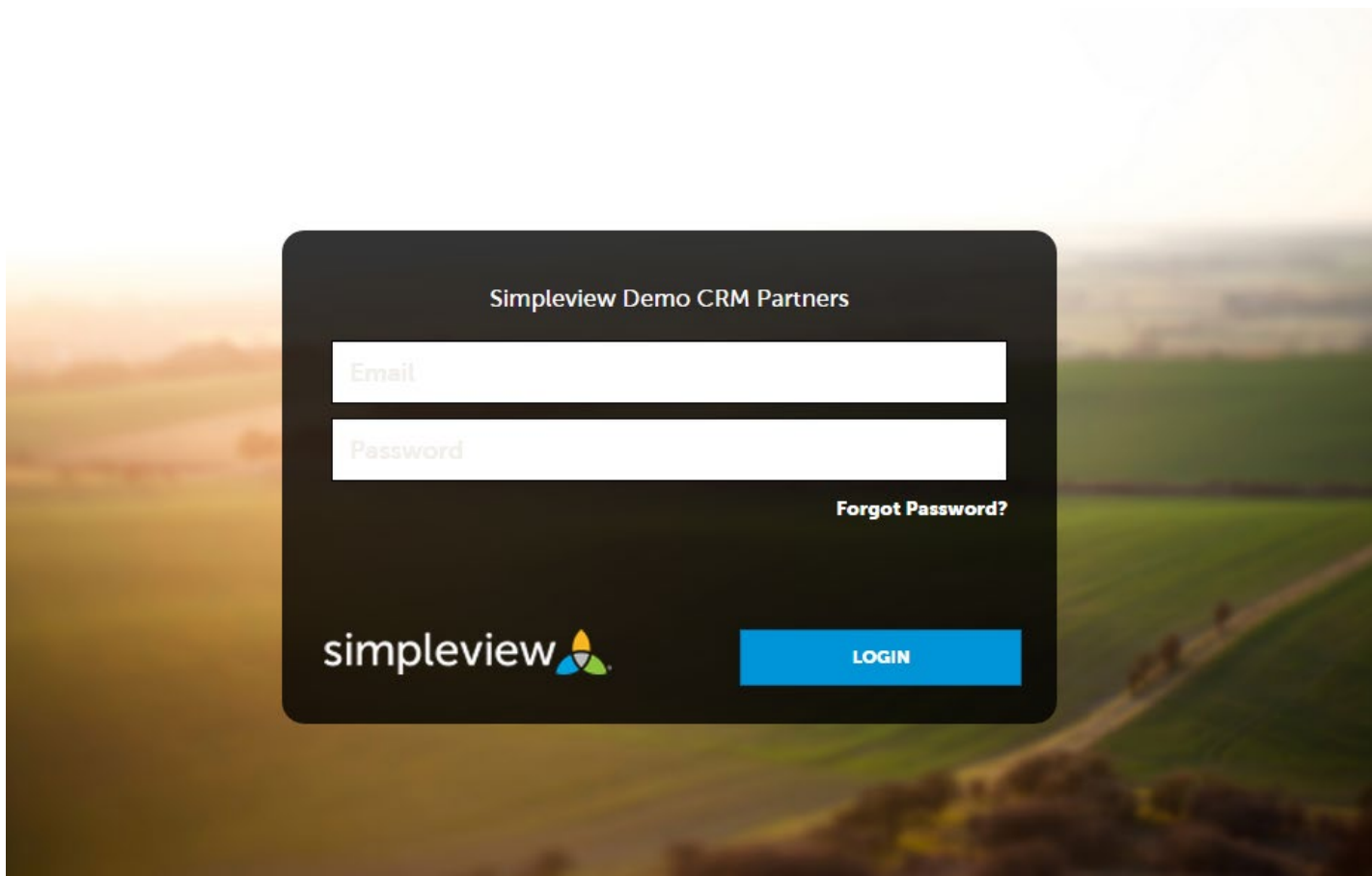
## Partner Portal User Instructions

The following are the user instructions provided by our partners at Simpleview to help guide you through using their proprietary Partner Portal software. Should you ever need assistance updating your account, please contact [members@visittucson.org](mailto:members@visittucson.org). We're happy to assist you!



# Login Screen

You can access the Portal login here <https://tucson.extranet.simpleviewcrm.com/login/#/login>.



# Home Screen

The screenshot shows the Simpleview Home Screen. At the top is a navigation bar with the Simpleview logo, 'Extranet' link, 'Simpleview Demo CRM Partners' text, user email 'user@simpleviewinc.com' with a 'Logout' link, a dropdown menu for 'Simpleview Hotel and Conference Center', and a search icon. On the left is a vertical sidebar with icons for home, user profile, documents, announcements, charts, and tools. The main content area is divided into three sections: 'At A Glance', 'Partner Bulletins', and 'Post Board'. The 'At A Glance' section features three colored boxes: a purple box for '0 Listing Views', an orange box for '0 Listing Click Throughs', and a green box for '0 Offer Views'. A red arrow points to the 'At A Glance' title, and a 'See All' link is to its right. The 'Partner Bulletins' section has a 'Show: All Bulletins' dropdown and lists three items: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. The 'Post Board' section shows three posts from 'Kara's Eco Hotel', 'City Center Hotel and Conference Center', and 'The Lauren Isely Resort'.

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 business' interaction with Visit Tucson.

NOTE: The At A Glance section resets at the start of each month so you're always viewing monthly totals.



# Home Screen (cont'd)

The screenshot shows the Simpleview Home Screen interface. At the top, there is a navigation bar with the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. A search icon is on the far right. A vertical sidebar on the left contains icons for home, user profile, documents, announcements, charts, and tools. The main content area is divided into three sections: 'At A Glance', 'Partner Bulletins', and 'Post Board'. 'At A Glance' features three colored boxes: a purple box for 'Listing Views' (0), an orange box for 'Listing Click Throughs' (0), and a green box for 'Offer Views' (0). 'Partner Bulletins' includes a dropdown for 'Show: All Bulletins' and three bulletins: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. 'Post Board' displays a list of posts from other businesses, including 'Kara's Eco Hotel', 'City Center Hotel and Conference Center', and 'The Lauren Isely Resort'. A red arrow points to a blue 'Post' button in the top right corner of the Post Board section.

simpleview Extranet Simpleview Demo CRM Partners user@simpleviewinc.com Logout Simpleview Hotel and Conference Center

## At A Glance [See All](#)

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

## Partner Bulletins

Show: All Bulletins

- Partner Bulletin Test**  
[View Full](#)
- Weather warning**  
[View Full](#)
- Review Your Visitors Guide Information!!!!**  
It's time to review the information that will be placed in the 2015 Visitors Guide.  
[View Full](#)

## Post Board

- Kara's Eco Hotel**  
07/28/2015  
Can anyone post a reply? I can't figure it out!  
[1](#) [✉](#)
- City Center Hotel and Conference Center**  
07/14/2015  
Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.  
[0](#) [✉](#)
- The Lauren Isely Resort**  
07/13/2015  
Multi-Partner Sharing Bulletin  
Free concert on Saturday. Come hang out at the bar and enjoy local music.

Post Board allows you to communicate with other businesses 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)

The screenshot shows the Simpleview Home Screen interface. At the top, there is a navigation bar with the Simpleview logo, "Extranet" link, "Simpleview Demo CRM Partners" text, user email "user@simpleviewinc.com" with a "Logout" link, and a dropdown menu for "Simpleview Hotel and Conference Center". A search icon is on the far right. A vertical sidebar on the left contains icons for home, user profile, documents, announcements, analytics, and settings. The main content area is divided into three sections: "At A Glance" with three colored cards (purple for Listing Views, orange for Listing Click Throughs, green for Offer Views), "Partner Bulletins" with a dropdown menu and three bulletins (one with a blue and white exclamation mark), and "Post Board" with three posts from Kara's Eco Hotel, City Center Hotel and Conference Center, and The Lauren Isely Resort. A red arrow points to the "Partner Bulletins" section.

Partner Bulletins are important notices, documentation, events, etc. sent to you by Visit Tucson. Important bulletins will be marked with a blue and white exclamation mark. We encourage you to read all bulletins as they contain important information to help you make the most of your membership.



# Home Screen (cont'd)

Simpleview Extranet Simpleview Demo CRM Partners user@simpleviewinc.com Logout Simpleview Hotel and Conference Center

**Member Profile**  
Manage your Accounts

- Accounts
- Contacts
- My Benefits
- Invoices

0 Listing Click Throughs

0 Offer Views

See All

**Post Board**

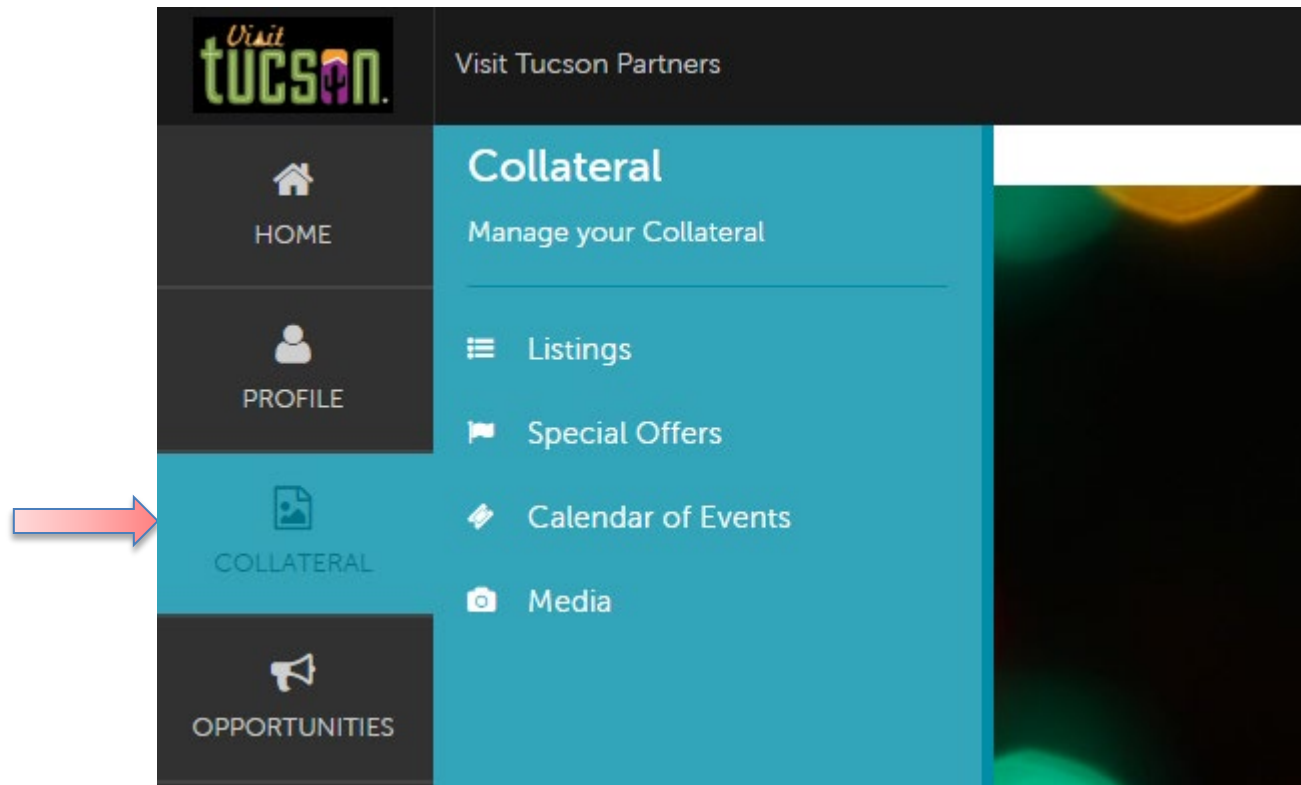
- Kara's Eco Hotel** 07/28/2015  
Can anyone post a reply? I can't figure it out!
- City Center Hotel and Conference Center** 07/14/2015  
Industry Happy Hour. All service industry professionals get \$3.00 appetizers from 11pm to 2am. Show your employee ID or name badge.
- The Lauren Isely Resort** 07/13/2015  
Multi-Partner Sharing Bulletin  
Free concert on Saturday. Come hang out at the bar and enjoy local music.

**NOTE:** Not all menu options presented here will be available to all members. The options available to you are based on your membership level.

By clicking the Profile icon, you can view/edit your business information, contacts, view information about your account interaction with Visit Tucson and view/pay your invoices. More on these options later in the presentation.



# Home Screen (cont'd)



By clicking the Collateral icon, you can view/edit your listings, special offers, calendar of events, and media (i.e. images). More on these options later in the presentation.



# Home Screen (cont'd)

The screenshot displays the Simpleview Home Screen interface. At the top, the navigation bar includes the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', the user email 'user@simpleviewinc.com', a 'Logout' link, and a dropdown menu for 'Simpleview Hotel and Conference Center'. The left sidebar is teal and features the 'Opportunities' section with the subtext 'Manage your Opportunities'. A red arrow points to the 'Opportunities' icon in the sidebar. Below this, the sidebar lists 'RFPs', 'Media Leads', and 'Service Requests'. The main content area has a white background and contains two large colored cards: an orange card for 'Listing Click Through' with a hand cursor icon, and a green card for 'Offer Views' with a flag icon. A 'See All' link is positioned above the cards. To the right is a 'Post Board' section with a blue edit icon. It contains two posts: one from 'Kara's Eco Hotel' dated 07/28/2015 with a comment 'Can anyone post a reply? I can't figure it out!' and one from 'City Center Hotel and Conference Center' dated 07/14/2015 with a message about 'Industry Happy Hour'.

By clicking the Opportunities icon, you can view and respond to RFP's (Request for Proposals) sent to you by Visit Tucson. Opportunities are broken into RFP's (meeting and tour leads), Media Leads (travel writer RFP's), and Service Requests (non-room specific RFP's). More on these options later in the presentation.





# Home Screen (cont'd)

The screenshot shows the 'Visit Tucson Partners' home screen. On the left is a dark sidebar with navigation icons and labels: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and REPORTS. A large red arrow points from the 'COLLATERAL' label down to the 'REPORTS' label. The main content area is white and titled 'Reports'. It features two sections: 'Partner Data' and 'Leads'. The 'Partner Data' section lists four reports: 'October 2024 STR Data', 'September 2024 STR Data', 'August 2024 STR Data', and 'July 2024 STR Data'. The 'Leads' section lists 'Definite Convention Calendar' with a sub-note: 'Opportunities, Tour/Travel, and Signature Events, in the status of definite, refined by arrival date and confidentiality, for member use.'

By clicking the Reports icon, you can view reports Visit Tucson has posted for you. To view a report just click the name of the report. One report always available is the Definite Convention Calendar. This is a list of all the group business coming to town that you can filter by date and group type. We also provide members with the latest STR data by month for our region.



# Manage Profile - Accounts

Accounts



Filters (0) Manage Filters

Account is one of:

CHOOSE ▾

APPLY FILTERS

Page 1 of 1 Go to Page: 1

Actions	Account
  ▾	Simpleview Hotel and Conference Center
	<ul style="list-style-type: none"><li>Manage Amenities</li><li>Manage Meeting Space</li></ul>

Page 1 of 1 Go to Page: 1

After you click the Profile icon and then Accounts, you will be presented with your account name and various actions you can perform. If you see multiple account names, this is because your login has access to more than one partner 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 if applicable.



# Manage Profile - Accounts (cont'd)

## Update Account

**SAVE**

**CANCEL**

Sections:

- Account Information
- Phone Information
- Address Information
- Social Media
- General

### Account Information

Account: Simpleview

Website: <http://www.simpleviewinc.com>

gevens@simpleviewinc.com

### Phone Information

Primary: (520)575-1151 Ext

Alternate: Ext

Toll Free:

Fax: (520)575-1171 Ext

When you view or edit your account information, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing the account, the button in 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!



# Manage Profile - Contacts

**Contacts**

Filters (0) Manage Filters

Account is one of:

Contact Type is:

**APPLY FILTERS**

**ADD CONTACT** Page 1 of 1 Go to Page: 1

Actions	Full Name	Account	Title	Email	Contact Type
	Angel Berry	Simpleview Hotel and Conference Center		aberry@simpleviewinc.com	Primary
	Alena Chaika	Simpleview Hotel and Conference Center		achaika@simpleviewinc.com	Secondary

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, and Clone (i.e. duplicate) a contact depending upon your portal permissions. **NOTE: It is vital to keep all account contact information up to date and accurate. Without correct contact information, we are unable to send you business. If you need to request permission to update account contacts, please reach out to [membership@visittucson.org](mailto:membership@visittucson.org).**



# Manage Profile - Contacts (cont'd)

**Update Contact**

**SAVE**

**CANCEL**

**Sections:**

- [Contact Information](#)
- [Address Information](#)
- [Phone Information](#)
- [Additional Information](#)
- [General Contact Custom Fields](#)

**Contact Information**

**Account:** ◀Required  
Simpleview

**First Name:** ◀Required  
Chris

**Last Name:** ◀Required  
George

**Full Name:** ◀Required  
Chris George

**Department:**

**Title:**  
Director of Product Education

**Contact Type:** ◀Required  
Other

**Preferred Contact Method:**  
Email

**Email:** ◀Required  
cgeorge@simpleviewinc.com

**Send Email:**  
 YES  NO

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! Any field that's identified as Required (in red text) must be completed.



# Manage Profile - My Benefits

## Benefits

### Overview

- Listings
- Offers
- Events
- Leads/RFPs
- Service Requests
- Inkind/Expenses
- Advertising Opportunities
- Press Mentions
- Marketplace
- Event Hits



PRINT

### Account

-All-

### Month

July

### Year

2024

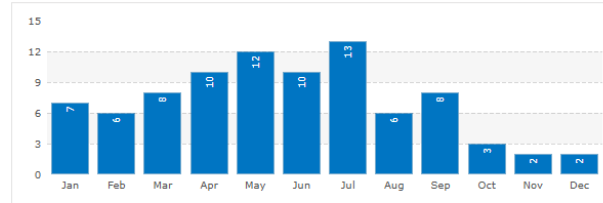
### TO

### Month

June

### Listings [See Details](#)

Views



### Offers [See Details](#)

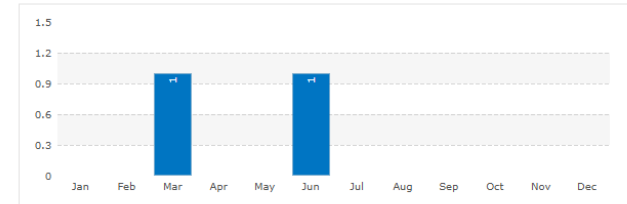


### Press Mentions [See Details](#)

Mentions



### Events [See Details](#)



### Leads/RFPs [See Details](#)

Sent



### Services [See Details](#)

Service Requests Sent



After you click the Profile icon and then My Benefits, you will be presented summary reports of various account metrics. The information you see on this page is specifically related to your business and can be filtered by month and year. For example, you can see your listing view totals for a given month or use the drop-down menu and choose to see listing click thru totals. The Benefits page is designed to help give you meaningful metrics about your account performance.



# Manage Profile - Invoices

## Invoices

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.

**Simpleview** PAY ACCOUNT BALANCE \$0.00

Actions	Invoice ID	Account	Type	Invoice Date	Invoice Amount	Paid Amount	Balance Due
	38168	Simpleview	Membership	07/01/2024	\$950.00	\$950.00	\$0.00
		Simpleview	Membership	07/03/2023	\$950.00	\$950.00	\$0.00
	36001	Simpleview	Membership	07/01/2022	\$950.00	\$950.00	\$0.00
	35247	Simpleview	Membership	07/12/2021	\$950.00	\$950.00	\$0.00
	34575	Simpleview	Membership	01/01/2020	\$1,000.00	\$1,000.00	\$0.00

After you click the Profile icon and then Invoices, you will be presented with a list of your account invoices. To view the details of the invoice you can either click the eyeball icon or the Print icon. To pay an invoice, click the eyeball icon to first view the invoice or click the Pay Account Balance button at the top of the page to pay any outstanding invoice. You can also print any invoice by clicking the printer icon.



# Manage Profile - Invoices (cont'd)

RETURN

PRINT INVOICE

PAY NOW

Sections:

- Recipient Details
- Invoice Details
- Payment Details
- General

Type: Membership

Description: Test

Invoice Date: 11/13/2009

Due Date: 11/13/2009

Invoice Amount: \$2,060

Paid Amount: \$0

Balance Due: \$2,060

Payment Date:

Payment Method:

Payment Details

Actions	Payment ID	Payment Method	Payment Date	Amount
No Records Were Found				

When viewing an invoice, you can see the payment history associated to that invoice. If the invoice has an outstanding balance, you will see a Pay Now button in the top left of the page. The Pay Now button will take you to a secure page to pay using a credit card much like any online payment portal on the internet.







# Collateral - Listings



## 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.

ADD LISTING 

 Page 1 of 1  Go to Page:  

Actions	Company	Listing Type	Category	Subcategory	Listing ID	
  	Simpleview Hotel and Conference Center	Website	Accommodations	Luxury Resorts	41983	

 Page 1 of 1  Go to Page:  

After you click the Collateral icon and then Listings, you will be presented with your account's website 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)

Update Listing

SAVE

CANCEL

Sections:

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

Listing Information

Account: ◀Required

Simpleview Hotel and Conference Center

Type: ◀Required

Website

Contact:

Alena Chaika

Address Type:

Physical

Listing Description:

Testing GEO-Coding Test test test

When you view or edit a listing, you can quickly scroll to a section on the page by clicking the links on 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!

**NOTE:** Many edits will require approval from Visit Tucson. Upon saving your updates, Visit Tucson will be notified of your changes/adds. Any field that's identified as Required (in red text) must be completed.

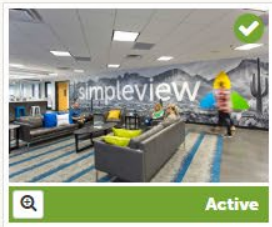


# Collateral – Listings (cont'd)

## Listing Image

*All images used must be owned by your organization. Visit Tucson is not responsible for copyright law infringement. Add images to your account by going to Collateral | Media. Listing images must be in a horizontal (landscape) high-resolution (300 dpi) format, and at least 1920 pixels wide. File names for images must be alpha-numeric only, no special characters. Images must be assigned to your listings to appear on the website.*

Select one or more images



When you edit a listing, you can select one or multiple images to associate to the listing by selecting those Listing Images from the Listing Image preview. As mentioned in the previous slide; many edits of listings will require approval from Visit Tucson. Upon saving your updates, Visit Tucson will be notified of your changes/adds. We'll discuss more about images in the Collateral – Media slide.




# Collateral – Special Offers

## 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

Page 1 of 1 Go to Page: 1

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending	
  	20% Off Rooms Sunday through Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

Page 1 of 1 Go to Page: 1

After you click the Collateral icon and then Special Offers, you will be presented with your business' offers. The pencil icon will allow you to edit an existing offer. By clicking the eyeball icon, you can view an 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.



# Collateral – Special Offers (cont'd)

## Update Offer

**SAVE** **CANCEL**

**Sections:**

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

### Offer Information

**Account:** ◀Required  
Simpleview Hotel and Conference Center

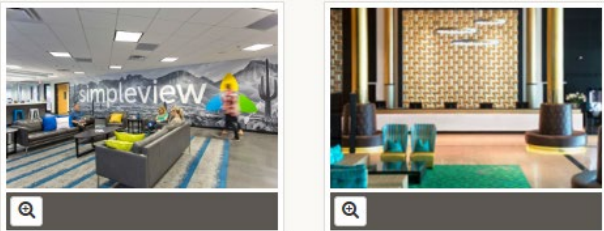
**Offer Title:** ◀Required  
20% Off Rooms Sunday through Thursday Nights

**Offer Link:**  
www.simpleviewinc.com

**Offer Text:**  
Get 20% Off Rooms Sunday through Thursday Nights in the month of August!

### Offer Image

Select an image




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. **A special offer must always have an image associated or it will not be approved. Make sure to select an image to associate with your offer from the Offer Image previews.** NOTE: Once you submit your offer it will require approval from Visit Tucson. Upon saving your updates, Visit Tucson will be notified of your changes/adds. Any field that's identified as Required (in red text) must be completed.




# Collateral – Calendar of Events


## Events




+ 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 EVENT 

< Page 1 of 1 > Go to Page:  

Actions	Event ID	Title	Priority	Start Date	End Date	Event Category	
  	57	Bossista	Gold	07/07/2015	07/07/2015	Family, Arts and Culture, Historical	
  	59	Simpleview Festival	Platinum	07/08/2015	07/08/2015	Sports, Family	

< Page 1 of 1 > Go to Page:  

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



# Collateral – Special Calendar of Events (cont'd)

Update Event

SAVE

CANCEL

Sections:

- Event Information
- Event Location
- Event Dates
- Image Gallery
- General

Event Information

Account: ◀Required

Simpleview Hotel and Conference Center

Title: ◀Required

Simpleview Festival

Featured:

YES  NO

Contact:

Shawn Wilkins

Admission:

Description:

<p>This is the Simpleview Festival event description. &nbsp;&nbsp;&nbsp;<span>This is the Simpleview Festival event description. Further down

Email:

Priority: ◀Required

Platinum

Website:

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 button in the top left will say Edit. 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! **An event must always have an image associated or it will not be approved.** NOTE: Any edits to an event or submission of a new event will require approval from Visit Tucson. Upon saving your updates, Visit Tucson will be notified of your changes/adds. Any field that's identified as Required (in red text) must be completed. *Pay special attention to the hints in red text on each page. They provide you with valuable information on how to use the portal effectively.*



# Collateral – Special Calendar of Events (cont'd)

**SAVE**

**CANCEL**

Sections:

- Event Information
- Event Location
- Event Dates
- Image Gallery
- General

One Day Daily **Weekly** Monthly Yearly

**Weekly Recurrence Options**

Every **1** Week(s) on **MONDAY, TUESDAY, WEDNESDAY**

**Recurrence End**

**No End Date**

**End after** **0** occurrences

**End on** **09/30/2015**

The Calendar of Events has a recurrence model built-in. You can make your event a one-time event or an ongoing event. Recurring events can be set to occur daily, weekly, monthly, or yearly. 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.





# Collateral – Special Calendar of Events (cont'd)

SAVE

CANCEL

Sections:

- Event Information
- Event Location
- Event Dates
- Image Gallery
- General

Image Gallery

Drag and Drop Files here  
or use the "Browse" button below to find files to add

BROWSE

As with Listings and Special Offers you must 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 an image or click the Browse button to search your computer for an image. **An event must always have an image associated or it will not be approved by Visit Tucson Events staff. REMEMBER – NO TEXT should be present on Event images. Please no flyer or poster images.**



# Collateral – Media

Media





Filters (0) Manage Filters

Account is one of:

CHOOSE ▾

APPLY FILTERS

ADD NEW MEDIA Page 1 of 1 Go to Page: 1

Actions	Title	Image
  	Hotel	

After you click the Collateral icon and then Media, you will be presented with your account's images which could possibly be used in listings and/or 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.



# Collateral – Media (cont'd)

## New Media

SAVE

CANCEL

Sections:

Media Information

### Media Information

*IMPORTANT: ALL IMAGES USED MUST BE OWNED BY YOUR ORGANIZATION. Visit Tucson is not responsible for copyright law infringement. Listing images must be in a horizontal (landscape) high-resolution (300dpi) format at least 1920 pixels wide with a file size between 500k and 2 MB. File names for images must alpha-numeric only, no special characters. BEST PRACTICE is to use descriptive image titles to increase SEO value. Be sure to click the drop down list, under the heading "Listings" at the bottom of the page once you've uploaded an image. You must choose to associate an image with the listing in which you want the image to appear. Click the listing you'd like to display the image. You will see a check mark appear next to the listings you've selected. Make sure to then click "Save" in the upper left corner to save changes. Images MUST be assigned to your listing in order to appear on the website.*

Account: Required

Simpleview

Title: Required

Best practice is to use descriptive image titles to increase SEO (search engine optimization) value.

Type: Required

--Choose One--

Sort Order:

Choose "logo" for your business' logo. Images with this type will appear in the logo section of your listing. Choose "Image" for all other listing images. They will appear in the images section of your listing. You can also choose "YouTube Video" to add a URL link to a YouTube video that will appear in the images section of your listing.

Sort order number for logos should always be 0. Sort order for images that will appear on your listing should start with 1 for the image you'd like to appear first on your listing, and go in ascending order from there.

Description:

Listings:

CHOOSE AMONG THE FOLLOWING... ▾

Make sure to assign your image to at least one (or more) listings from this drop-down list. Selected listings will appear highlighted with a check mark at the end. If you do not assign an image to an active listing, your image will not appear on the website.

NOTE: The Sort Order of your images will be reflected on your listings. The image with a Sort Order of 1 will show up first in your listing images.



# Collateral – Media (cont'd)

The screenshot shows a web form for managing media. On the left is a dark sidebar with a wrench icon. The main form area has a top navigation bar with 'SAVE' (blue) and 'CANCEL' (grey) buttons. Below this is a 'Sections:' menu with 'Media Information' selected. The form itself is divided into three sections: 1. 'Image' section with a dropdown menu showing 'Image' and an empty input field. 2. 'Description:' section with a large text area. 3. 'File:' section containing a dashed box with the text 'Drag and Drop File To Page' and 'or use the "Browse" button below to find a file to add'. Below this are 'BROWSE' (blue) and 'REMOVE' (orange) buttons, followed by the text 'You can drag a file to the page to replace this file or use the "Browse" button'. At the bottom is a 'Listings:' section with a dropdown menu labeled 'CHOOSE AMONG THE FOLLOWING...'. Red arrows point to the dashed box and the dropdown menu.

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.



# Opportunities – RFPs

## RFPs

**Filters (1)** Manage Filters

**Responded is:**

**Lead Name contains:**

**Lead ID contains:**

**Group Type is one of:**

**Response Date:**

**Create Date:**

**Organization contains:**

**Status is one of:**

**APPLY FILTERS** **CLEAR FILTERS**

After you click the Opportunities icon and then RFPs, you will be presented with your account's leads. RFP stands for Request for Proposal. Your filters 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 as well as Opens Leads you have already responded to. For more on lead statuses and their definitions see the next slide.



# Opportunities – RFPs (cont'd)

## LEAD STATUS DEFINITIONS



On the Opportunities | RFPs page you will see 11 different lead statuses:

- 1. Closed / No Bid Sent:** These leads can be Tentative, Definite, Lost, or Cancelled. The Closed/No Bid Sent status signifies this is potential business you did not bid on and the response due date has passed.
- 2. Open:** These are leads in a tentative status that you have not bid on yet and the response due date has not passed.
- 3. Open / Bid Sent:** These are leads in a tentative status that you have already responded to 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 you've responded to, but the response due date has past thus you cannot edit your response.
- 6. Closed / Lost to Another City:** These are leads you were pursuing but the business was lost.
- 7. Closed Cancelled:** These are leads you won but the group has cancelled.
- 8. Closed / Won:** These are definite leads in which your business 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 you were not selected for the business.
- 11. Assist** - Lead in Assist status type; Visit Tucson is assisting with a given piece of business, but the booking isn't being driven by Visit Tucson.



# 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	<a href="#">Test Meeting 2016</a>	Open	02/13/2015	Meeting		Association of Simpleview Professionals	<a href="#">Simpleview Hotel and Conference Center</a>	01/01/2016	02/16/2016	02/19/2016	
	12005	<a href="#">2016 Annual Convention</a>	Open	10/27/2014	Meeting	Convention	Microsoft SV	<a href="#">Simpleview Hotel and Conference Center</a>	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. 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 gear icon - Manage Filters in the top right corner of the data grid. One of the more important column headings is the Group Type. This signifies the type of lead, for example, meeting, sales meeting, or conference/convention.

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



# Opportunities – RFPs (cont'd)

## Lead Details

[PRINT](#)

[RETURN](#)

Revision Notes

No revision notes have been entered.

Sections:

- Revision Notes
- Lead Information**
- Meeting Dates
- Room Summary
- History/Futures
- Responses
- Room Data
- General

### Lead Information

Lead ID	57337
Meeting Name	Proforma 2026 Million Dollar Club
Account	
Organization	Proforma
Organization Address	8800 EAST PLEASANT VALLEY ROAD Cleveland OH 44131
Contact	
Meeting Planner Contact	Anna Stankey XXXXXX New York Area NY XXXXX UNITED STATES
3rd Party Meeting Planner	Prestige Global Meeting Source - NY
Type	Conference/Convention
Source Code	Cvent
EEl Type	EIC Tag: Lead
Market Segment	Consultant/Management Co/Third Party Planner
Decision-Making Process	

When viewing a lead, you can skip to different sections by clicking the left navigation. Notes and attachments can generally be found in one of two areas, Lead Information and/or Notes section. The above graphic shows the lead section; attachments will be found in the Meeting Specs field.





# Opportunities – RFPs (cont'd)

RETURN

Sections:

- Revision Notes
- Lead Information
- Meeting Dates
- Room Summary
- History/Futures
- Responses
- Room Data
- General



### 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		

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 us 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, you can commit to for this lead in the Room Information section of the response page.



# Opportunities – RFPs (cont'd)

**SAVE**

**CANCEL**

Sections:

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

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 RFP response, scroll to the File Attachments section of the response page and click the Attach File button to browse your computer 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:

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 Opportunities icon and then selecting Media Leads, you can view any leads sent to you by Visit Tucson's PR & Communications Department. These are usually requests for hosting travel writers or other media groups. If you do receive a lead, it 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 Opportunities – RFPs section for more details on this. **Visit Tucson's PR & Communications department will contact your property or business directly with media leads and do not often use this functionality.**



# 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 ▼

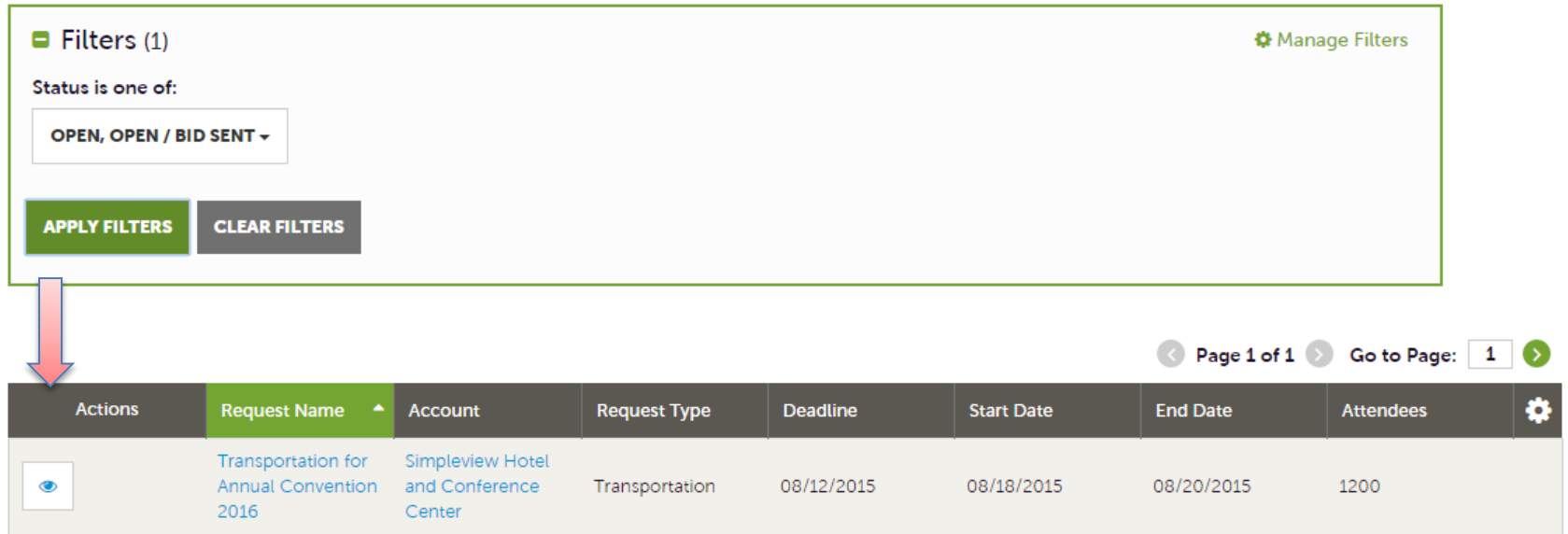
**Comments:** Required

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.



# Opportunities – Service Requests


## Service Requests



The screenshot displays the 'Service Requests' interface. On the left, a vertical sidebar contains icons for user profile, document, and a bell, with a red arrow pointing upwards. The main content area features a filter panel with the following elements:

- Filters (1)** with a **Manage Filters** link.
- Status filter: **Status is one of:**
- APPLY FILTERS** (green button) and **CLEAR FILTERS** (grey button).

Below the filter panel, a table lists the service requests. The table has the following columns: Actions, Request Name, Account, Request Type, Deadline, Start Date, End Date, Attendees, and a settings gear icon. The first row contains the following data:

Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees	
	Transportation for Annual Convention 2016	Simpleview Hotel and Conference Center	Transportation	08/12/2015	08/18/2015	08/20/2015	1200	


Page navigation: Page 1 of 1, Go to Page:

By clicking the Opportunities icon and then selecting Service Requests, you can view non-room night specific leads sent to your business. These requests can include transportation, audio/visual, catering, etc.

Once you have adjusted your filters to your preferences, click the eyeball icon to view detailed information about a service request or click the name of the request.



# Opportunities – Service Requests (cont'd)

**RETURN** 

Sections:

- Request Information
- Request Dates
- Contact Information
- Accounts/Responses
- General

Company: Federal Highway Administration Retirees  
Lead: 35th FHWA Retirees Reunion - 2025  
Request Type: Transportation Request  
Request Name: Transportation Request from Client  
Attendees: 80  
Deadline:  
Budget:  
Location:  
Description: Ron Hill with Federal Highway Administration Retirees would like transportation quotes for group. Staying at Westward Look, tours to Pima Air & Space & Desert Museum

Additional Documents

---

**Request Dates**

Start Date	04/27/2025
End Date	05/01/2025
Start Time	
End Time	

When viewing a service request, you can get detailed information in the Request information section along with RFP attachment downloads.





# Opportunities – Service Requests (cont'd)

The screenshot displays a user interface for managing service requests. On the left, a table titled "Accounts/Responses" lists a response for "Simpleview Hotel and Conference Center" with a status of "Open". A red arrow points to the "Actions" column of this row. To the right, a modal window titled "Response for Simpleview Hotel and Conference Center" is open, showing a "Pursuing:" section with radio buttons for "YES" and "NO", and a "Comments:" section with a text input area. A red arrow points to the "Pursuing:" section.

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Response

**Response for Simpleview Hotel and Conference Center**

**Pursuing:** Required

YES  NO


**Comments:** Required

If the Response Due Date has not passed, you are able to add/edit a response by clicking the Pencil icon in the Accounts/Responses section of the service request. Once clicked, you can tell us if you are pursuing this piece of business by clicking the Yes or No option in the Pursuing section to the right side of the page.



# Opportunities – Service Requests (cont'd)

Accounts/Responses

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Respo

General

Decision Date

Food / Beverage

Misc. Expense

Category

Economic Value -  
Lauren Test

Bureau-Only Comments:

These comments will not be seen by the client. They will only be seen by bureau staff.



**ATTACH A FILE**

No files have been attached



**UPDATE**

**CANCEL**

As you scroll down the response page on the right, you have the ability to attach proposals by clicking Attach File button or click and drag the file from your computer. Be sure to click the Update button to save your changes!



# Questions & Assistance

If you have questions regarding your Visit Tucson membership, need help accessing or making account updates via the Partner Portal or would like to schedule a Partner Portal training, please contact us at [members@visittucson.org](mailto:members@visittucson.org).

