

Partner CRM Instructions Partner Record



Logging In:

1. You will be sent an email from the CVB with the link and a temporary password.

2. Click on the link, which will take you to the "CRM Extranet Login" screen. The web address is **http://extranet.charlottesville.simpleviewcrm.com/**

3. Your username is your full e-mail address.

4. The first time you log in, your password is the temporary password that was emailed to you. After the first time, it will be the password you have chosen.

5. You will be asked to change your password to one of your preference. Click on the "Forgot Password?" link if you need to reset your password.

Viewing Your Member Record:

You can view five items under your Member Record:

- 1. Contacts
- 2. Listings (Website)
- 3. Web Tab Coupons/Special Offers and Photos/Logos
- 4. Amenities
- 5. Benefits Summary

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Contacts:

1. To update your contact records, click the pencil icon (\mathscr{P}) next to the contact.

2. To add a new Contact, click the "New Contact" button.

3. You can also clone a contact by clicking on the "Clone" link (\Box) to the left of a current contact. This will make a duplicate contact. You can change the information that needs to be updated (i.e. name, e-mail address, phone #, etc).

4. When adding a new contact, please fill in all available fields. Fields in RED will be required. Make sure to click "Save" once you've filled out all of the fields.

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Adding A Listing:

1. To update your website listing, click the pencil icon (\checkmark) to the left of the appropriate listing under the Listings tab. You will then be able to change the listing.

2. To add a listing, select the Listings tab and then click "Add New Listing" to the right of the screen.

3. All updates concerning listings will be placed in "pending" status until the updates have been approved by the CVB. The added or updated listings will display on the website once this take place.

				Account Inform	ation			
Account ID:	962					Status:	Active - Industry	
Account:	Charlott	esville Albem	arle CVB			Region:	None	
Account (sort):	Charlott	esville Albem	arle CVB			Email:	info@visitcharlottesville.org	
Parent:						Web Site:	http://www.visitcharlottesville.org	
Formerly:	CACVB							
				Phone/Fax Nun	nbers			
Primary:	(434) 2	93-6789				Alternate:	(877) 386-1103	
Tollfree:						Fax:	(434) 295-2176	
				Address Inform	ation			
Physi	cal Addre	ass		Billing Addre	55		Shipping Address	
610 East Main Street Charlottesville, VA 22 UNITED STATES	902		P.O. Box 178 Charlottesville UNITED STATE	e , VA 22902 S			610 East Main Street Charlottesvillle, VA 22902 UNITED STATES	
				Additional Fie	lds			
				General				
click here to update you	ır current li	Location sting name	0				click here to add a new listing	
Contact Listings V	Web Am	enities Bene	efits Summary				odd New	Listing
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2046	Website		Activities & Attractions	Visitors Centers	Listings			
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Editing a Listing:

- 1. Contact Drop-down: This contact, if chosen, will show on the website listing.
- 2. Address: Select "Physical" to display the main address on your Account.
- 3. Category: the main category your listing is in (i.e. Attractions, Accommodations, etc). This must be changed by CACVB staff.
- 4. Sub-Category: (i.e. museum, historical site, etc a more defined category). This must be changed by CACVB staff.
- 5. Listing: The text that will show on your listing page. It can include a description of the business, history, hours of operation, etc.
- 6. Listing Details anything you enter into these fields will override the information in your "Account Detail" – otherwise it will automatically pull that information into your listing. For instance, if the public name of the business is different from the name on the account, you would use the Company override. Similarly, you can include different web page, email address, etc.
- 7. Near the bottom of the screen, you can also enter an e-mail to be notified when the website listing reaches a designated number of hits.
- 8. Click the "save" button to save your changes.

			LISTING: UPDATE LIST	ING FOR CACVB	
			Save Car	ncel	
			Colored fields are	required.	
			Listing Inform	nation	
Туре:	Website				
Company:	CACVB			Contact:	Raven Long (Secondary) 🗾
Category:	Pending			Address Type:	Account: Physical
SubCategory:	Pending				
Listing:	2 🛛	» 🔅 🗷 🗶 🖻 🛍	a 🙉 🗄 🔚 🚝 🛊 🤊 🤊	ů 💝 - 🟈 🔞	
	This is the li	sting description.			
	You can inc	lude your hours and any other	special information you choose.		
	Path: p				
			Additional SubCa	itegories	
			Listing Det	ails	
Field	Overwrite?	Account Value		Overwrit	te with
Company:		CACVB			
Company (sort):		CACVB			
Address Line 1:					
Address Line 2:					
Address Line 3:					
City:					
State:					

Coupons/Special Offers

1. This feature gives members the opportunity to create and update special offers to be displayed on the website.

2. To create a coupon, click on the "Add New Coupon" Button under the Web tab.

	Account Informa	tion		
Account ID: 188212		Status:	Active - Industry	
Account: simpleview hotel-DO NO UNTIL AFTER PARTNER T	F DELETE OR EDIT THIS ACCOUNT RAINING	Region: (Charlottesville and Albemarle Cou	inty
Account (sort): simpleview hotel-DO NO UNTIL AFTER PARTNER T	F DELETE OR EDIT THIS ACCOUNT RAINING	Email: a	astone@simpleviewinc.com	
Parent:		Web Site:	http://www.simpleviewinc.com	
Formerly:				
	Phone/Fax Numb	ers		
Primary:		Alternate:		
Tollfree:		Fax:		
	Address Informa	tion		
Physical Address	Billing Addres	s	Shipping Ad	dress
8 N La Cholla Blvd #100 on, AZ 85741 FED STATES	7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES		7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES	
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Action Offer Title > Pe				

3. A window will open up, allowing you to enter a title of the coupon, as well as a description and what the coupon entails (discount, free item, etc).

- a. The "Redeem From" & "Redeem To" Dates these will print on the coupon as dates which the coupon is valid
- b. The "Post To" and Post From" Dates determined by you, your coupon will only show up on the website during these dates –it will automatically be removed on the day after the "Post From" date
- c. You can use the check box(es) at the bottom of the page to link the coupon to your web listing by selecting the appropriate listing.

New Coupon	Walcoma Chris Conna - Lacad in ta
COUPON: NEW CO	UPON FOR SIMPLEVIEW HOTEL-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING
	Save Save & New Coupon Close
	Colored fields are required.
	Coupon Information
Offer Title:	
Offer Link:	
Offer Text:	
	Coupon Dates
Redeem From:	Redeem To:
Post From:	Post To:
	Coupon Categories
	Available Selected Packages Image: Constraint of the second s
	Add To Listing(s)
simpleview hotel-DO	NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING (Website: Accomodations: Hotels/Motels)
	Colored fields are required.
	Save Save & New Coupon Close

4. This coupon will then appear on your individual listing, as well as on a page listing all Coupons/Special Offers that our partners have available.

5. Visitors can print the coupon to redeem at your business.

6. To edit the coupon, you just need to click on the pencil icon (\checkmark) to the left of your coupon, and make the desired changes.

Photos and Logos

Here you can add photos or logos, and edit which listings each will show up on (if you have more than one listing).

1. In Media, under the Web tab, click the "New Logo/Image" Button.

			ACCO	UNT DETAIL:	CACVB				
				.ccount Informa	tion				
Account	ID: 160482				Status:	Active-Par	tners		
Accor	int: CACVB				Region:	None			
Account (so	rt): CACVB				Email:				
Pare	int:				Web Site:				
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🥜 🗙 Logo Tes		Sunset1.jpg			User: Admin/Web	09-22-2010	User: Raven Long	09-23-2010	0

2. Choose whether you wish to upload a logo or an image. Logos show up at the top of the main listing. Photos are in the photo tab on the main listing.



- 3. Put in a title for the image/logo, then click "Choose file" and find the image on your computer.
- 4. If you have more than one listing, select which listings you wish to have the image/logo show up on.
- 5. Click "Save."

Amenities:

1. Each business can update their amenity information as they see fit. This information can be viewed on the CVB website & may be included in print materials.

- 2. Select the appropriate tab under Amenities
- 3. Click "Edit Amenities" to update

			Account Info	ormation		
Account ID:	188212			Status:	Active - In	dustry
Account:	simpleview hot UNTIL AFTER P	el-DO NOT DE ARTNER TRAII	LETE OR EDIT THIS ACCOUNT	Region:	Charlottes	ville and Albemarle County
Account (sort):	simpleview hot UNTIL AFTER P	el-DO NOT DE ARTNER TRAII	LETE OR EDIT THIS ACCOUNT	Email:	astone@si	mpleviewinc.com
Parent:				Web Site:	http://www	w.simpleviewinc.com
Formerly:						
			Phone/Fax I	Numbers		
Primary:				Alternate:		
Tollfree:				Fax:		
			Address Info	ormation		
Physi			Rilling Ad	droce		Shipping Addross
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N La Cholla Blvd # n AZ 85741	100		7458 N La Cholla Blvd #100		7458 N	La Cholla Blvd #100
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Benefits Summary:

This tab will display reporting associated with your account. As the CVB works on your behalf the tabs will be populated giving you the opportunity to stay abreast of all of the great things the CVB is doing to assist your business.

- 1. Inkind/Expenses
- 2. Leads (explained in Meeting Sales & Group Tour instructions)
- 3. Services
- 4. Events
- 5. Articles
- 6. Web Site
- 7. Coupons Hits

				Account Infor	mation				
Account ID:	: 188212				Status:	Active - I	ndustry		
Account	simpleview hote	I-DO NOT DEL	ETE OR EDIT TH	IS ACCOUNT	Region:	Charlotte	sville and Alber	marle County	
Account (sort)	simpleview hote UNTIL AFTER PA	I-DO NOT DEL	ETE OR EDIT TH	IS ACCOUNT	Email:	astone@s	impleviewinc.co	om	
Parent	1				Web Site:	http://ww	vw.simpleviewir	nc.com	
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				Phone/Fax N	umbers				
Primary:					Alternate:				
Tollfree:					Fax:				
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Inkind/Expenses:

1. The Expenses section shows you the dollar amount CVB has spent with your business.

2. The Inkind section shows if you have donated your services to CVB and the value of the donation.

Leads:

This tab will display a detailed list of all Leads that were sent to you business by the CVB. The list is broken down by department & shows the number of Leads in a particular status during the selected time frame.

- 1. Total Number of Leads Sent-This is the number of Leads sent to your business during the selected timeframe.
- 2. Number of Leads Pending-The number of Leads that have been sent, but the winning property has not been selected.
- 3. Number of Assists-The number of Leads where the CVB assisted in the booking. This means the CVB was notified by the client who already knew they wanted to stay at your property.
- 4. Number of Leads Lost to Another City-The number of times the piece of business was lost to a competing city.
- 5. Number of Leads Lost to Another Property-These Leads are committed to Charlottesville, but selected a property other than yours. Number of Leads Won, but Cancelled-Your property was originally awarded the business, but the client was forced to cancel.

	Account Informat	ion		
Account ID: 188212		Status:	Active - Industry	
Account: simpleview hotel	DO NOT DELETE OR EDIT THIS ACCOUNT	Region:	Charlottesville and Albemarle County	
Account (sort): simpleview hotel-	DO NOT DELETE OR EDIT THIS ACCOUNT	Email:	astone@simpleviewinc.com	
Parent:	INER TRAINING	Web Site:	http://www.simpleviewinc.com	
Formerly:				
	Phone/Fax Numb	ers		
Primary:		Alternate:		
Tollfree:		Fax:		
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Services:

The Services Tab works much like the Leads tab, but is a breakdown of all Service Requests that were sent to your property.

- 1. Number of Service Requests Sent-The number of Service Requests sent to your property from the CVB.
- 2. Number of Service Requests Won-The number of Service Requests where the client selected your business.
- 3. Number of Partner Referrals-The number of times the CVB recommended your business to a traveler.

Articles:

- 1. This tab will show you the details on any media publication where your property was mentioned & the CVB had a direct role in getting that article to print.
- 2. The publication, article title, date of publication and circulation of the publication will be detailed in this section.

Website & Coupons:

- 1. Under the Website & Coupons tabs, you can view the following:
 - a. The number of times your listing or coupon has been viewed during the specified dates (you can view month-by-month by using the dropdown menus as seen below).
 - b. How many times your listing or coupon has been viewed since a specified date
 - c. Under Web Site, you can change the Notification Number (you will be sent a notification e-mail when your listing has been viewed 100 times, or whatever number you choose to set that to)