



**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 e-mailed 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

The screenshot displays the CRM Extranet interface for a member record. The browser address bar shows the URL: <http://extranet.charlottesville.simpleviewcrm.com/mem/accts/index.cfm#tab:1>. The page header includes the Charlottesville Virginia logo and a welcome message: "Welcome, Raven Long - Logged in to: CACVB". There is a "LOGOUT" button in the top right corner.

The main content area is titled "ACCOUNT DETAIL: CACVB" and is divided into several sections:

- Account Information:** Account ID: 160482, Account: CACVB, Account (sort): CACVB, Parent: , Formerly: , Status: Active - Industry, Region: --None--, Email: , Web Site: .
- Phone/Fax Numbers:** Primary: , Alternate: , Tollfree: , Fax: .
- Address Information:** Physical Address: --None--, Billing Address: --None--, Shipping Address: --None--.
- Additional Fields:** (Collapsible section)

Below the account details is a navigation menu with the following items: **Contacts**, Listings, Web, Amenities, Benefits Summary. The "Contacts" item is highlighted with a red oval.

At the bottom of the page, there is a "Filters" dropdown set to "--Any Type--", a "Page 1 of 1" indicator, and a table with columns: Action, Contact ID, Contact Name, Title, Email, Phone, Type. An "Add New Contact" button is located in the top right of the table area.

**Contacts:**

1. To update your contact records, click the pencil icon (  ) 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 (  ) 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.

Charlotteville CVB CRM

charlottesville.simpleviewcrm.com/mem/contacts/index.cfm?action=form&contactID=295133

CONTACT: UPDATE CONTACT

Save Save & New Contact Cancel

Colored fields are required.

**Contact Information**

First/Last Name:

Full Name:

Account: CACVB

Contact Type: Secondary

Assistant:

Preferred Method: Email

Ast. Phone:

Email:   Send

Spouse:

Title:

Children:

Department:

Birthdate: --Month-- --Day--

Gender:  Male  Female

**Phone/Fax Numbers**

Primary:  ext.

Alternate:  ext.

Cell:

Fax: (434) 295-2176 ext.   Send

Home:

**Address Information**

Physical	Billing	Shipping
Use: Account Physical	Use: Account Billing	Use: Account Shipping
Address: test	Address: <input type="text"/>	Address: <input type="text"/>
Line 2: <input type="text"/>	Line 2: <input type="text"/>	Line 2: <input type="text"/>
Line 3: <input type="text"/>	Line 3: <input type="text"/>	Line 3: <input type="text"/>
City: testville	City: <input type="text"/>	City: <input type="text"/>
State: VA - Virginia	State: <input type="text"/>	State: <input type="text"/>
Zip: 11111	Zip: <input type="text"/>	Zip: <input type="text"/>
Country: UNITED STATES	Country: UNITED STATES	Country: UNITED STATES

**Assigned Tags**

Available: ABA member, Board Member, CMP, CTIS

Selected: --None--

CONTACT: NEW CONTACT FOR SHERATON NORFOLK WATERSIDE HOTEL

Save Save & New Contact Cancel

Colored fields are required.

**Contact Information**

First/Last Name:

Full Name:

Account: Sheraton Norfolk Waterside Hotel

Department:

Contact Type: --None--

Preferred Method: --None--

Title:

Assistant:

Email:   Send

Children:

Ast. Phone:

Gender:  Male  Female

Birthdate: --Month-- --Day--

Spouse:

**Phone/Fax Numbers**

Primary:  ext.

Alternate:  ext.

Cell:

Fax:  ext.   Send

Home:

**Address Information**

Physical	Billing	Shipping
Use: Account Physical	Use: Account Billing	Use: Account Shipping
Address: 777 Waterside Drive	Address: 777 Waterside Drive	Address: <input type="text"/>
Line 2: <input type="text"/>	Line 2: <input type="text"/>	Line 2: <input type="text"/>
Line 3: <input type="text"/>	Line 3: <input type="text"/>	Line 3: <input type="text"/>
City: Norfolk	City: Norfolk	City: <input type="text"/>
State: VA - Virginia	State: VA - Virginia	State: <input type="text"/>
Zip: 23510	Zip: 23510	Zip: <input type="text"/>
Country: UNITED STATES	Country: UNITED STATES	Country: UNITED STATES

**Additional Information**

**General**

Salutation:

Middle Name:

Other Email:

## Adding A Listing:

1. To update your website listing, click the pencil icon (  ) 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 Information		
Account ID: 962	Status: <b>Active - Industry</b>	
Account: <b>Charlottesville Albemarle CVB</b>	Region: --None--	
Account (sort): <b>Charlottesville Albemarle CVB</b>	Email: <a href="mailto:info@visitcharlottesville.org">info@visitcharlottesville.org</a>	
Parent:	Web Site: <a href="http://www.visitcharlottesville.org">http://www.visitcharlottesville.org</a>	
Formerly: <b>CACVB</b>		

  

Phone/Fax Numbers	
Primary: <b>(434) 293-6789</b>	Alternate: <b>(877) 386-1103</b>
Tollfree:	Fax: <b>(434) 295-2176</b>

  

Address Information		
Physical Address	Billing Address	Shipping Address
610 East Main Street Charlottesville, VA 22902 UNITED STATES	P.O. Box 178 Charlottesville, VA 22902 UNITED STATES	610 East Main Street Charlottesville, VA 22902 UNITED STATES

  

Additional Fields	
General	
Location	
Market	0
Name	

click here to update your current listing

click here to add a new listing

Contact **Listings** Web Amenities Benefits Summary

Add New Listing

Filters: All Listings --Any Type-- Page 1 of 1

Action	Listing ID	Type	Listing Title	Category	SubCategory	Rank	Listing
	2046	Website		Activities & Attractions	Visitors Centers	Listings	

Page 1 of 1

## 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 LISTING FOR CACVB

Colored fields are required.

Listing Information

<b>Type:</b>	Website	
<b>Company:</b>	<input type="text" value="CACVB"/>	<b>Contact:</b> <input type="text" value="Raven Long (Secondary)"/>
<b>Category:</b>	Pending	<b>Address Type:</b> <input type="text" value="Account: Physical"/>
<b>SubCategory:</b>	Pending	

**Listing:**

This is the listing description.

You can include your hours and any other special information you choose |

Path: p

Additional SubCategories

Listing Details

	Field Overwrite?	Account Value	Override with...
<b>Company:</b>	<input type="checkbox"/>	<input type="text" value="CACVB"/>	
<b>Company (sort):</b>	<input type="checkbox"/>	<input type="text" value="CACVB"/>	
<b>Address Line 1:</b>	<input type="checkbox"/>	<input type="text"/>	
<b>Address Line 2:</b>	<input type="checkbox"/>	<input type="text"/>	
<b>Address Line 3:</b>	<input type="checkbox"/>	<input type="text"/>	
<b>City:</b>	<input type="checkbox"/>	<input type="text"/>	
<b>State:</b>	<input type="checkbox"/>	<input type="text"/>	

## 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 DETAIL: SIMPLEVIEW HOTEL-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING**

Account Information	
Account ID: 188212	Status: <b>Active - Industry</b>
Account: simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING	Region: Charlottesville and Albemarle County
Account (sort): simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING	Email: astone@simpleviewinc.com
Parent:	Web Site: <a href="http://www.simpleviewinc.com">http://www.simpleviewinc.com</a>
Formerly:	

Phone/Fax Numbers	
Primary:	Alternate:
Tollfree:	Fax:

Address Information		
Physical Address	Billing Address	Shipping Address
7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES	7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES	7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES

Additional Fields	
<b>Contacts</b>	Listings
<b>Web</b>	Amenities
Benefits Summary	

**Coupons**

[Add New Coupon](#)

Filters: All Coupons | --Any Type--

Action	Offer Title	Pending	Redeem Start	Redeem End	Post Start	Post End
THERE ARE NO MATCHING RECORDS FOR THIS VIEW.						

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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

**COUPON: NEW COUPON 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	▶	--None--
Group Tour Packages	▶	
Meeting Packages	▶	
Wedding Packages	▶	
Reunion Packages	▶	
Golf Packages	▶	
Wine Packages	▶	
Culinary Packages	▶	

**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 (✎) 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.

The screenshot shows the 'ACCOUNT DETAIL: CACVB' interface. It includes sections for Account Information, Phone/Fax Numbers, and Address Information. The 'Additional Fields' section is expanded to show 'Web' and 'Media' tabs. A red box highlights the 'Media' tab, and a red arrow points to the 'New Logo/Image' button. Below this, a table lists existing media items.

Action	Type	Title	Filename	Created By	Created	Last Updated By	Last Updated	Sort Order
	Logo	Test	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.

The screenshot shows the main listing page for 'CACVB'. It displays the account name, address, and a button to 'Add to Trip Builder'. A red box highlights the 'Photos' tab in the navigation bar, and a red arrow points to a sunset image displayed on the page.

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 DETAIL: SIMPLEVIEW HOTEL-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING**

Account Information		
Account ID: <b>188212</b>	Status: <b>Active - Industry</b>	
Account: <b>simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</b>	Region: <b>Charlottesville and Albemarle County</b>	
Account (sort): <b>simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</b>	Email: <b>astone@simpleviewinc.com</b>	
Parent:	Web Site: <b>http://www.simpleviewinc.com</b>	
Formerly:		

Phone/Fax Numbers

Primary:	Alternate:
Tollfree:	Fax:

Address Information

Physical Address	Billing Address	Shipping Address
<b>7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES</b>	<b>7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES</b>	<b>7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES</b>

Additional Fields

Contacts Listings Web **Amenities** Benefits Summary

**Amenities** General Meeting Facilities

**AMENITIES FOR "AMENITIES"**

**Edit Amenities**

Amenities

Handicapped Accessible: <b>No</b>	Catering: <b>No</b>
Child Friendly: <b>No</b>	500+ Capacity Conference Rooms: <b>No</b>
ADA Compliant: <b>No</b>	Smoking Section: <b>No</b>
Airport Shuttle: <b>No</b>	Smoke Free Environment: <b>No</b>
Pool-Indoor: <b>No</b>	Mixed Drinks: <b>No</b>
Pets Welcome: <b>No</b>	Bus Parking: <b>No</b>
Restaurant: <b>No</b>	Breakfast: <b>No</b>
Room Service: <b>No</b>	Lunch: <b>No</b>
Complimentary Breakfast: <b>No</b>	Dinner: <b>No</b>
Express Check In/Out: <b>No</b>	Brunch: <b>No</b>
Bar or Lounge: <b>No</b>	Buffet: <b>No</b>
Exercise Facilities: <b>No</b>	Late Night Menu: <b>No</b>

## 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 DETAIL: SIMPLEVIEW HOTEL-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING**

Account Information	
Account ID: <b>188212</b>	Status: <b>Active - Industry</b>
Account: <b>simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</b>	Region: <b>Charlottesville and Albemarle County</b>
Account (sort): <b>simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</b>	Email: <b>astone@simpleviewinc.com</b>
Parent:	Web Site: <a href="http://www.simpleviewinc.com">http://www.simpleviewinc.com</a>
Formerly:	

Phone/Fax Numbers	
Primary:	Alternate:
Tollfree:	Fax:

Address Information		
Physical Address	Billing Address	Shipping Address
7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES	7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES	7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES

Additional Fields

Contacts Listings Web Amenities **Benefits Summary**

**Inkind/Expenses** Leads Services Events Articles Web Site Coupon Hits

Filters: --Both-- --All Types-- --All Groups-- 07/01/2010 to 07/31/2010 Page 1 of 0

Inkind ID	I/E	Group	Entity	Type	Date	Amount	Service	Date Added	Added By
THERE ARE NO MATCHING RECORDS FOR THIS VIEW.									

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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 your 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 DETAIL: SIMPLEVIEW HOTEL-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING		
Account Information		
Account ID: <b>188212</b>	Status: <b>Active - Industry</b>	
Account: <b>simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</b>	Region: <b>Charlottesville and Albemarle County</b>	
Account (sort): <b>simpleview hotel-DO NOT DELETE OR EDIT THIS ACCOUNT UNTIL AFTER PARTNER TRAINING</b>	Email: <b>astone@simpleviewinc.com</b>	
Parent:	Web Site: <b><a href="http://www.simpleviewinc.com">http://www.simpleviewinc.com</a></b>	
Formerly:		
Phone/Fax Numbers		
Primary:	Alternate:	
Tollfree:	Fax:	
Address Information		
Physical Address	Billing Address	Shipping Address
<b>7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES</b>	<b>7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES</b>	<b>7458 N La Cholla Blvd #100 Tucson, AZ 85741 UNITED STATES</b>
Additional Fields		
<a href="#">Contacts</a>   <a href="#">Listings</a>   <a href="#">Web</a>   <a href="#">Amenities</a>   <a href="#">Benefits Summary</a>		
<a href="#">Inkind/Expenses</a>   <a href="#">Leads</a>   <a href="#">Services</a>   <a href="#">Events</a>   <a href="#">Articles</a>   <a href="#">Web Site</a>   <a href="#">Coupon Hits</a>		
Date Range: <input type="text" value="01-01-2010"/> to: <input type="text" value="12-31-2010"/> <input type="button" value="Refresh"/>		
Click on any section in first column to see a detailed report		
Meeting Sales		
<a href="#">Total Number of Leads Sent</a>	0	-
<a href="#">Number of Leads Pending</a>	0	-
<a href="#">Number of Assists</a>	0	-
<a href="#">Number of Leads Won</a>	0	-
<a href="#">Number of Leads Lost to Another City</a>	0	-
<a href="#">Number of Leads Lost to Another Property</a>	0	-
<a href="#">Number of Leads Won, but Cancelled</a>	0	-
Tour/Travel		
<a href="#">Total Number of Leads Sent</a>	0	-
<a href="#">Number of Leads Pending</a>	0	-
<a href="#">Number of Assists</a>	0	-
<a href="#">Number of Leads Won</a>	0	-

**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 drop-down 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)