



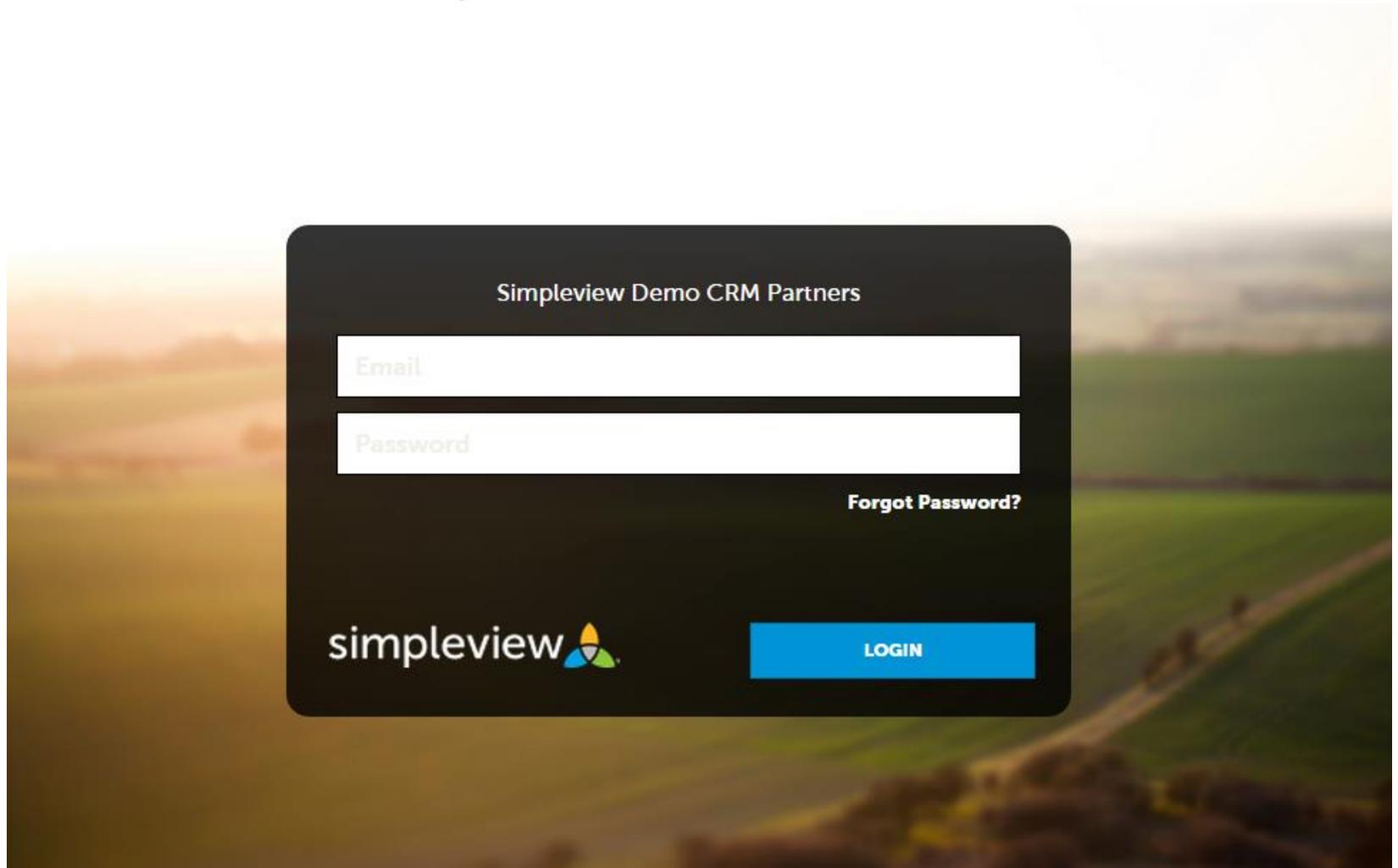
Visit Estes Park

The Destination
Marketing Organization

VisitEstesPark.com

Visit Estes Park Extranet 4.0 User Guide For Industry Partners

Login Screen



Home Screen

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!!!! [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.

At A Glance is a brief view of an Account's listings and special offers tracking. Clicking on the **See All** link to the right, engages a more detailed view of the Account and its interaction with Visit Estes Park.

Home Screen (cont'd)

The screenshot shows the Simpleview Home Screen. At the top is a dark 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. A vertical sidebar on the left contains icons for home, user profile, document, megaphone, pie chart, and wrench. 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, and 'Post Board' with a list of posts from other properties. A red arrow points to a blue 'Post Board' button with a pencil icon.

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 [Email](#)
- 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 [Email](#)
- 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 a user to communicate with other properties within the local marketing district. Clicking on the caption bubble icon allows a user to reply to a post. There is also an email icon for contacting the poster via email.

Home Screen (cont'd)

The screenshot displays the Simpleview Extranet 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'. A search icon is located 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:** A section with three colored cards: a purple card for '0 Listing Views', an orange card for '0 Listing Click Throughs', and a green card for '0 Offer Views'. A 'See All' link is positioned to the right of these cards.
- Partner Bulletins:** A section with a dropdown menu set to 'All Bulletins'. It lists three items: 'Partner Bulletin Test' (marked with a blue and white exclamation point), 'Weather warning' (marked with a blue and white exclamation point), and 'Review Your Visitors Guide Information!!!!' (marked with a blue and white exclamation point). Each item has a 'View Full' link. A red arrow points to the 'Partner Bulletins' header.
- Post Board:** A section with a blue edit icon. It displays three posts from partners: 'Kara's Eco Hotel' (dated 07/28/2015), 'City Center Hotel and Conference Center' (dated 07/14/2015), and 'The Lauren Isely Resort' (dated 07/13/2015). Each post includes a title, date, content, and interaction icons for comments and email.

Partner Bulletins are important notices, documentation, events, etc. posted by Visit Estes Park. Important bulletins will be marked with a blue and white exclamation mark.

Home Screen (cont'd)

The screenshot displays the Simpleview Extranet interface. At the top, the navigation bar contains 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 red arrow points to the 'Member Profile' icon in the left sidebar. The sidebar menu includes 'Member Profile', 'Accounts', 'Contacts', 'My Benefits', and 'Invoices'. The main content area features a 'See All' link, two summary cards: 'Listing Click Throughs' (0) and 'Offer Views' (0), and a 'Post Board' section with three posts from Kara's Eco Hotel, City Center Hotel and Conference Center, and The Lauren Isely Resort.

Clicking the **Member Profile** icon displays the business or property's information, such as contacts, Account details and information about interaction with Visit Estes Park (same as the See All link in the At A Glance section), in addition to invoices sent by Visit Estes Park.

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

Home Screen (cont'd)

The screenshot displays the Simpleview Extranet interface. At the top, the navigation bar includes the Simpleview logo, 'Extranet' status, user information 'user@simpleviewinc.com', and a search bar. A left sidebar menu is open, showing options like Listings, Special Offers, Calendar of Events, Media, Occupancy, and Materials Request. A red arrow points to the 'Collateral' icon in the sidebar. The main content area features two large colored boxes: an orange one for 'Listing Click Throughs' (0) and a green one for 'Offer Views' (0). To the right is a 'Post Board' with two posts: one from 'Kara's Eco Hotel' dated 07/28/2015 and another from 'City Center Hotel and Conference Center' dated 07/14/2015.

Clicking the **Collateral** icon, displays options for listings, special offers, calendar of events, media (i.e. images), occupancy data, and materials request from Visit Estes Park.

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

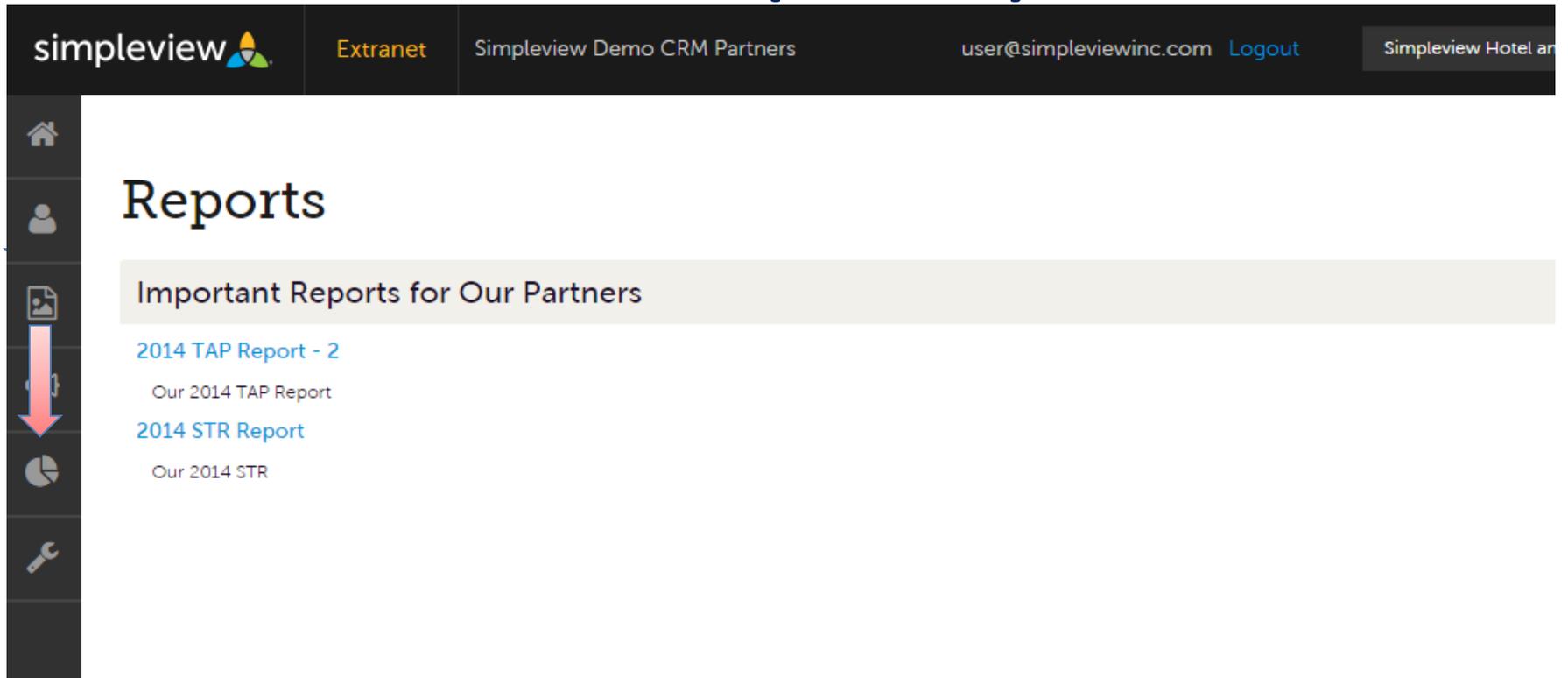
Home Screen (cont'd)

The screenshot shows the Simpleview Extranet interface. The top navigation bar contains 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 main content area features a teal sidebar with 'Opportunities' (Manage your Opportunities) and sub-items: RFPs, Media Leads, and Service Requests. A red arrow points to the 'Opportunities' icon. The main area shows two cards: 'Listing Click Throughs' (0) and 'Offer Views' (0). A 'Post Board' on the right displays two posts: 'Kara's Eco Hotel' (07/28/2015) with a comment 'Can anyone post a reply? I can't figure it out!' and 'City Center Hotel and Conference Center' (07/14/2015) with text about 'Industry Happy Hour'.

Clicking the **Opportunities** icon, displays options for leads sent by Visit Estes Park. Opportunities are broken into RFPs (Group 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)



The screenshot shows the Simpleview Extranet interface. The top navigation bar includes the Simpleview logo, the word "Extranet", the text "Simpleview Demo CRM Partners", the user email "user@simpleviewinc.com", a "Logout" link, and a "Simpleview Hotel an" button. A vertical sidebar on the left contains icons for Home, Profile, Reports (highlighted with a red arrow), Analytics, and Settings. The main content area is titled "Reports" and features a section "Important Reports for Our Partners" with two entries: "2014 TAP Report - 2" (with subtext "Our 2014 TAP Report") and "2014 STR Report" (with subtext "Our 2014 STR").

By clicking the **Reports** icon, displays reports Visit Estes Park has posted. To view a report just click the name of the report.

Filters and Data Grids

Let's take some time to discuss settings that can be configured by each individual user when using the extranet.

1. **Filters** – Allow users to narrow display results by changing their filter settings. Filters can be updated by clicking the **Manage Filters*** option in the top right corner of this section.
2. **Data Grids** –Columns can be configured for the individual's preferences. Each default column heading in a data grid can be modified by clicking the **sprocket*** icon in the top right corner of the grid.

* Remember, any adjustments made with the **sprocket** or the **Manage Filters** apply only to the person making the changes.

Filters and Data Grids

RFPs

Filters (1)  

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**

Filters and Data Grids (cont'd)

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 Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

Page 1 of 1 Go to Page: 1

Once the filters have been applied, the data grid will update with the matching results. Several icons may appear on the records within the grid. The appearance of these icons will depend on the page being viewed.

These icons are:

1. **Pencil** – allows editing of a record
2. **Eyeball** – allows viewing of a record
3. **Clone** – allows duplicating of a record
4. **Add Button** - Depending on the page, an Add button may appear in the top left of the data grid. When this option is available, clicking allows the addition of a new record.

Notice the **sprocket** icon that was mentioned previously.

Filters and Data Grids (cont'd)

The screenshot displays the 'RFPs' interface. On the left, a sidebar contains navigation icons. The main area shows a 'Filters (1)' section with several filter criteria: 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', 'Group Type is one of:', 'Response Date:', 'Create Date:', 'Organization contains:', and 'Status is one of:'. Each criterion has a corresponding input field or dropdown menu. On the right, a configuration menu is open, showing options for 'Columns', 'Filters', and 'Ordering'. The 'Filters' tab is selected, and the menu title is 'Choose Available Filters and their default values'. The menu lists several filter options with checkboxes: 'Account', 'Arrival (Preferred)', 'Create Date' (checked), 'Decision Date', 'Departure (Preferred)', 'Group Type' (checked), and 'Lead ID' (checked). Below each checked option is a sub-menu for its default value, such as '-All Dates-' for 'Create Date' and 'CHOOSE' for 'Group Type'.

Clicking on the **sprocket** icon or the **Manage Filters** button will trigger a menu as shown here. This menu provides options for personalizing the filters, data grid columns, and ordering of each. By changing these options, changing of these options affects **ONLY** the person making the changes.

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

- Manage Amenities
- Manage Meeting Space

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 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.

Manage 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 top left will display an Edit button. If you are editing the account , the top left will display a Save button. You must click the Save button before changes are applied!

Manage Profile - Contacts

Contacts

Filters (0) Manage Filters

Account is one of: CHOOSE

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 property. On this page you can Add, Edit, View, or Clone (i.e. duplicate) a contact depending upon your extranet permissions.

Manage Profile - Contacts (cont'd)

Update Contact

SAVE

CANCEL

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- ecomm
- Social Media
- General

Contact Information

Account: Required

Simpleview Hotel and Conference Center

First Name: Required

Angel

Last Name: Required

Berry

Full Name: Required

Angel Berry

Department:

Title:

Contact Type: Required

Primary

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 top left will display an Edit button. If you are editing a contact, the top left will display a Save button. You must click the Save button before changes are applied!

IMPORTANT NOTE: If a contact has left your property it is your responsibility to notify Visit Estes Park and/or change their contact type to “Inactive”.

Manage Profile - My Benefits



Benefits

- Listings
- Offers
- Fam Trips
- Events
- Leads/RFPs
- Service Requests
- Inkind/Expenses
- Social Mentions
- Press Mentions

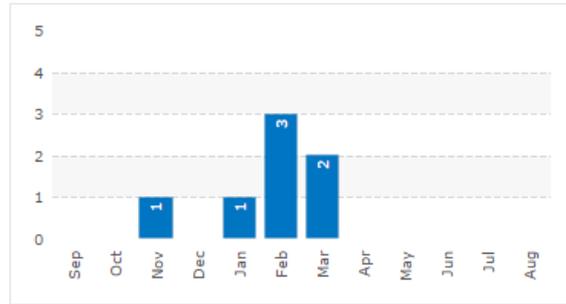


FROM
Month
September

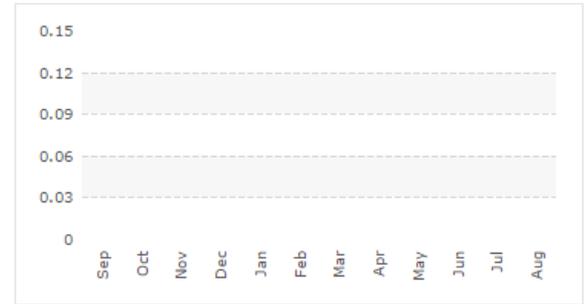
Year
2014

Listings [See Details](#)

Views ▾

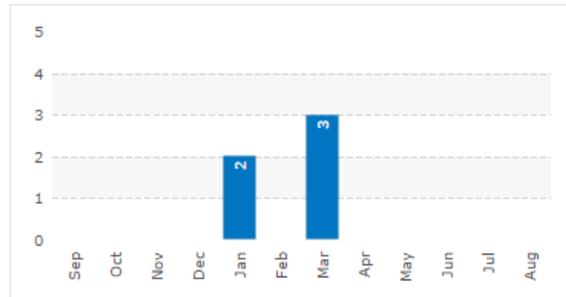


Offers [See Details](#)



Press Mentions [See Details](#)

Mentions ▾



Events [See Details](#)

Attended ▾



After you click the Profile icon and then My Benefits, you will be presented summary reports based on Visit Estes Park's interaction with your property. The information you see on this page is specifically related to your property.

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.

< Page 1 of 1 > Go to Page: >

Actions	Invoice ID	Account	Type	Invoice Date	Invoice Amount	Paid Amount	Balance Due	Payment Date	Description	
 	1565	Simpleview Hotel and Conference Center	Membership	11/13/2009	\$2,060.00	\$0.00	\$2,060.00		Test	
  		Simpleview Hotel and Conference Center	Membership	12/02/2014	\$300.00	\$0.00	\$300.00			

After you click the Profile icon and then Invoices, you will be presented with a list of invoices sent to your property. 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.

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 the invoice. If the invoice has an outstanding balance, you will see a Pay Now button in the top left of the page. Clicking 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.

NOTE: Pay Now will only appear if this feature has been enabled by Visit Estes Park.

Listings Collateral - 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.

Page 1 of 1 Go to Page: 1

Actions	Company	Listing Type	Category	SubCategory	Listing ID	
 	Simpleview Account	Website	Business Services	Advertising & Marketing	1343	



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 publication 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)

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 of the left of the page. If you are viewing a listing, the top left will display an Edit button. If you are editing a listing, the top left will display a Save button. You must click the Save button before changes are applied!

IMPORTANT NOTE: Any edits of listings will require approval from Visit Estes Park. Upon saving your updates, Visit Estes Park will be notified of your changes/additions.

Collateral – Listings (cont'd)

The screenshot displays a web form for editing or adding a listing. On the left, there is a vertical sidebar with a dark background. At the top of the sidebar are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these buttons is a 'Sections:' heading followed by a list of menu items: 'Listing Information', 'Categories', 'Details', 'Website Notifications', 'Listing Image', 'Social Media', and 'General'. The 'Listing Image' item is highlighted in blue. The main content area of the form is light beige. It contains two input fields: 'Email To Notify:' and 'Notification Interval:'. The 'Notification Interval' field contains the number '0'. Below these fields is a section titled 'Listing Image'. Underneath this title is a 'Listing Images:' label and a pull-down menu. The menu is currently open, showing the text 'HOTEL (IMAGES2.JPG)' with a downward-pointing arrow. A red arrow points to this menu from the right.

When you edit or add (if enabled) a listing, you can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu. As mentioned previously, any edits or adding of listings will require approval from Visit Estes Park. Upon saving your updates, Visit Estes Park 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

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 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. 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

Offer Image:
Hotel (images2.jpg)

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 will display a Save button. You must click the Save button before changes are applied! 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 Visit Estes Park. Upon saving your updates, Visit Estes Park will be notified of your changes/adds.

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 property's 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)

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, daily, weekly, monthly, or yearly. If it is not a one day event, 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

The screenshot shows a user interface for managing event collateral. On the left, there is a sidebar with a 'SAVE' button (blue) and a 'CANCEL' button (grey). Below these are 'Sections:' with a list of options: 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery' (highlighted), and 'General'. The main content area is titled 'Image Gallery' and features a large dashed box with the text 'Drag and Drop Files here' and 'or use the "Browse" button below to find files to add'. A 'BROWSE' button (blue) is positioned below the dashed box. A small image of a mountain landscape is visible in the bottom left corner of the main area. Red arrows point to the 'Image Gallery' header and the 'Drag and Drop Files here' text.

As with Listings and Special Offers you can 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.

Collateral – Media

The screenshot shows the Media management interface. At the top left is a sidebar with navigation icons. The main header is 'Media'. Below it is a filters section with a 'Filters (0)' indicator and a 'Manage Filters' link. The filters section includes a dropdown menu labeled 'Account is one of:' with a 'CHOOSE' option and an 'APPLY FILTERS' button. Below the filters is a blue 'ADD NEW MEDIA' button. To the right of this button is a pagination control showing 'Page 1 of 1' and 'Go to Page: 1'. Below the button and pagination is a table with columns for 'Actions', 'Title', and 'Image'. The table has one row for 'Hotel' with a night cityscape image. The 'Actions' column for the 'Hotel' row contains three icons: a pencil (edit), a red 'x' (delete), and a clone icon. A red arrow points to the 'ADD NEW MEDIA' button, and another red arrow points to the pencil icon.

After you click the Collateral icon and then Media, you will be presented with your property's images available for use on 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 create a new event by clicking the Add Event button.

Collateral – Media (Cont'd)

The screenshot shows a web interface for managing media. On the left is a dark sidebar with a wrench icon. The main area has a top navigation bar with 'SAVE' (blue) and 'CANCEL' (grey) buttons. Below this is a 'Sections:' menu with 'Media Information' selected. The main form contains:

- Image:** A dropdown menu currently showing 'Image'.
- Description:** A large text area for entering a description.
- File:** A large dashed box containing the text 'Drag and Drop File To Page' and 'or use the "Browse" button below to find a file to add'. Below this box are two buttons: 'BROWSE' (blue) and 'REMOVE' (orange). A red arrow points to the dashed box.
- Listings:** A dropdown menu with the text 'CHOOSE AMONG THE FOLLOWING...' and a downward arrow. A red arrow points to this dropdown.

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.

Collateral – Occupancy

Occupancy

Filters (0) [Manage Filters](#)

Year between: and

APPLY FILTERS

Page 1 of 1 Go to Page:

Actions	Year	Percent Occupied (Avg)	Last Updated
	2013	100	07/07/2015
	2014		
	2015		

After you click the Collateral icon and then Occupancy, you will be presented options to enter your hotel occupancy numbers by day/month for the year. Click the pencil icon next to the year to enter/edit your occupancy numbers.

Collateral – Occupancy (cont'd)

Update Occupancy

Account: Year: Entry Mode: BY PERCENT BY OCCUPANCY

You have unsaved changes

Simpleview Hotel and Conference Center					
Year	Month	% Occupied	Rms Occupied	Available	Rate
2015	January	<input type="text" value="88.00"/>	<input type="text" value="1,056"/>	<input type="text" value="1,200"/>	<input type="text" value="\$175.00"/>
2015	February	<input type="text" value="93.00"/>	<input type="text" value="1,116"/>	<input type="text" value="1,200"/>	<input type="text" value="\$189.00"/>

Once you click the pencil icon to add/edit your occupancy number, you will be presented with a grid of all the months for that year. You can choose to enter your occupancy by percentage or by Rooms. As you enter this data, you will see the % Occupied or Rms (rooms) Occupied fields auto-calculate based upon the data entered and the Available column data. As with all add/edit pages in the extranet, be sure to click the Save button!

Collateral – Materials Request

Materials Requests

Filters (0) Manage Filters

Status is:

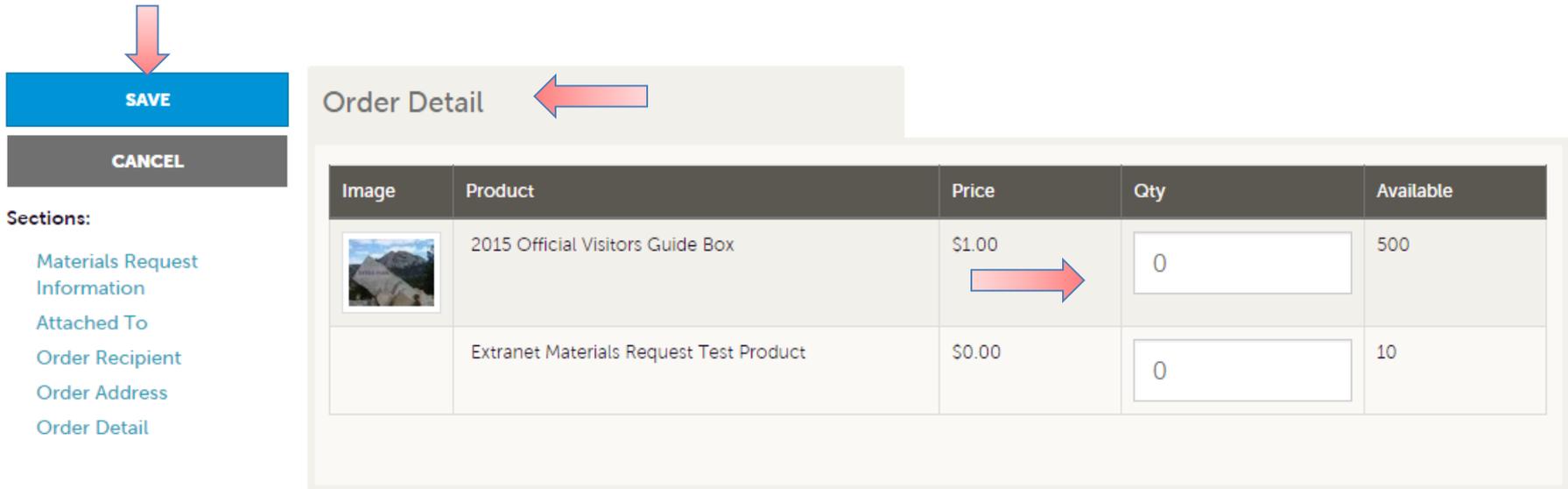
[ADD MATERIALS REQUEST](#) Page 1 of 1 Go to Page: 1

Actions	Order ID	Send Date	Full Name	Company	City/State/Zip	Items Ordered	
  	1384	08/07/2015	Shawn Wilkins	Simpleview Hotel and Conference Center	Tucson, AZ 85741	300	

Page 1 of 1 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 Visit Estes Park. This feature will allow you to request collateral such as publication guides from VEP. 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 icons.

Collateral – Materials Request (cont'd)



SAVE

CANCEL

Sections:

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

Order Detail

Image	Product	Price	Qty	Available
	2015 Official Visitors Guide Box	\$1.00	<input type="text" value="0"/>	500
	Extranet Materials Request Test Product	\$0.00	<input type="text" value="0"/>	10

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, Visit Estes Park will be notified of your request.

IMPORTANT NOTE: You will only be able to request materials if enabled by Visit Estes Park.

Opportunities – RFPs

RFPs

Filters (1) Manage Filters

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Status is one of:

APPLY FILTERS **CLEAR FILTERS**

After you click the RFP icon and then RFPs, you will be presented with your property's Sales and Tour Leads. The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the Apply Filters button. By Default, you will see all of your Open Leads and Opens 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 extranet 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 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 been lost.
- 7. Closed Cancelled:** These are Leads where 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)

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 on the selected 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 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 a 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 adding/editing your response, you will need to tell Visit Estes Park 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		

The Room Information section of the response page is where you can enter the number of rooms, by room type, that your property can commit to for this Lead.

Opportunities – RFPs (cont'd)

The screenshot displays the RFP response interface. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' list with four items: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'SAVE' button to the top of the summary table. Another red arrow points from 'File Attachments' in the list to the 'File Attachments' section below. A third red arrow points from the 'ATTACH FILE' button to the text 'or drag files to the page'.

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 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 RFP icon and then selecting Media Leads, you can view Leads sent to your property from Visit Estes Park’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 Opportunities – 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

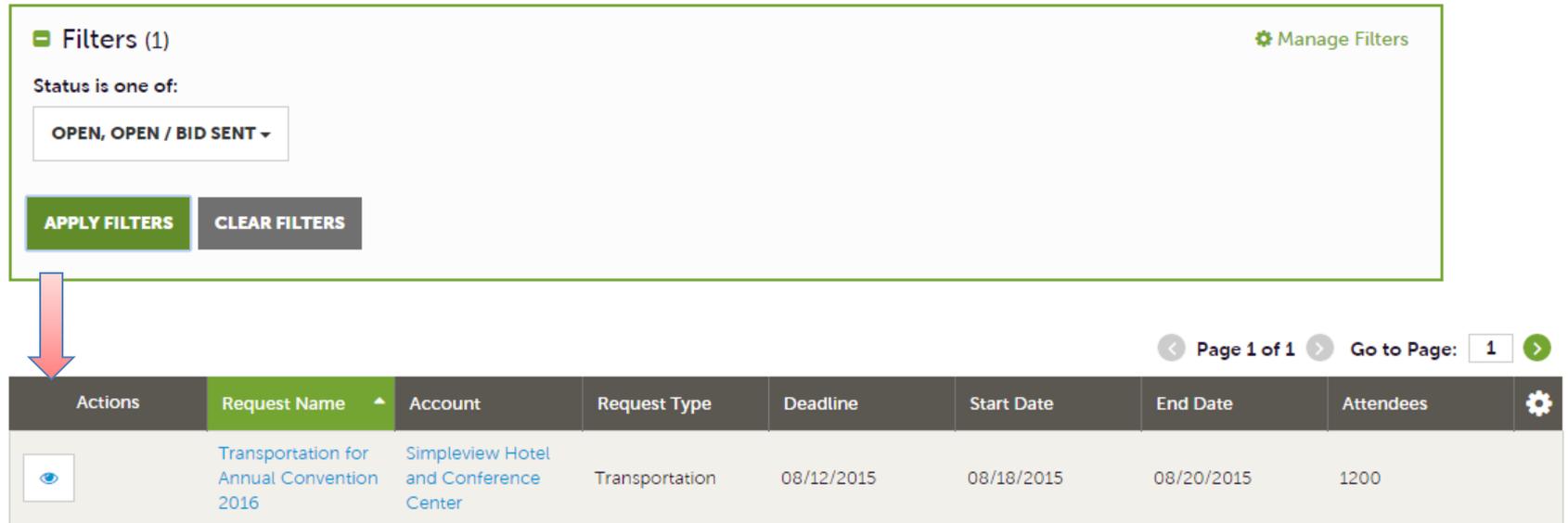
Simpleview Hotel and Conference Center ▼

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.

Opportunities – Service Requests

Service Requests



The screenshot shows a web interface for managing service requests. On the left, a vertical sidebar contains icons for user profile, document, and a red arrow pointing up. The main content area features a filter section with a dropdown menu set to 'OPEN, OPEN / BID SENT', 'APPLY FILTERS' and 'CLEAR FILTERS' buttons, and a 'Manage Filters' link. Below the filters is a table with columns: Actions, Request Name, Account, Request Type, Deadline, Start Date, End Date, Attendees, and a gear icon. A red arrow points from the 'APPLY FILTERS' button to the table. The table contains one row with an eye icon in the Actions column and 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	

By clicking the RFP icon and then selecting Service Requests, you can view non-room night specific Leads sent to your property. These requests can range from transportation, audio/visual, catering, etc...

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

Opportunities – Service Requests

RETURN

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

Attendees 1200

Deadline 08/12/2015

Budget \$13,000

Location To/From Hotel & Convention Center

Description Need transportation shuttles for convention running all day from 7am to 7pm.

Additional Documents

- 2016-Annual-Convention-RFP.docx

Section Collapsed, click header to expand.

RETURN

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

Additional Notes and Documents

File	Title	Category	Description
	RFP	Spec Sheet	See attached RFP for more details

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

Depending upon Visit Estes Park's preferences, this information may be contained in the Additional Notes and Documents section of the Service Request.

Opportunities – Service Requests

The screenshot displays a user interface for managing service requests. On the left, a table titled "Accounts/Responses" is shown with a red arrow pointing to the "Actions" column. The table has four columns: "Actions", "Company", "Status", and "Response". The first row contains a pencil icon in the "Actions" column, "Simpleview Hotel and Conference Center" in the "Company" column, "Open" in the "Status" column, and "No Respo" in the "Response" column. A red arrow also points to the pencil icon. Below the table is a "General" section. On the right, a modal window titled "Response for Simpleview Hotel and Conference Center" is open, with a red arrow pointing to the "Pursuing:" field. The "Pursuing:" field is labeled "Required" and contains two radio button options: "YES" and "NO". Below this is a "Comments:" field, also labeled "Required", which is a large empty text area.

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

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 Visit Estes Park 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 (con't)

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 scroll to the button and click the Update button to save your changes!



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Thank you very much for your
partnership with Visit Estes Park!

For any questions or if you are in need of
help while using the Extranet, please
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ahuebner@visitestepark.com

