

# OLIVE



Online Link Into Visit Estes


# Login Screen

Simpleview Demo CRM Partners

Email

Password

[Forgot Password?](#)

simpleview 

[LOGIN](#)

# Home Screen

The screenshot shows the Simpleview Home Screen. 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. On the left, a vertical sidebar contains icons for home, user profile, document, megaphone, pie chart, and wrench. 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 cards: a purple card for 'Listing Views' (0), an orange card for 'Listing Click Throughs' (0), and a green card for 'Offer Views' (0). 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:' dropdown set to 'All Bulletins' and lists three items: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. The 'Post Board' section 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, and a brief description of the offer or event.

**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 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, documents, announcements, charts, and tools. 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 in the top right corner of the main content area.

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 replies, 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 replies, 1 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 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. On the left, a vertical sidebar contains icons for home, user profile, document, notification, analytics, and settings. 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 '0 Listing Views', an orange box for '0 Listing Click Throughs', and a green box for '0 Offer Views'. 'Partner Bulletins' has a dropdown menu set to 'All Bulletins' and a list of three items: 'Partner Bulletin Test', 'Weather warning', and 'Review Your Visitors Guide Information!!!!'. 'Post Board' displays three posts from other users, each with a date and a brief description.

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.

**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 includes the Simpleview logo, 'Extranet', 'Simpleview Demo CRM Partners', 'user@simpleviewinc.com Logout', and 'Simpleview Hotel and Conference Center'. A red arrow points to the 'Member Profile' icon in the left sidebar. The sidebar menu includes 'Accounts', 'Contacts', 'My Benefits', and 'Invoices'. The main content area shows '0 Listing Click Throughs' and '0 Offer Views' with a 'See All' link. The 'Post Board' section displays three posts: 'Kara's Eco Hotel' (07/28/2015), 'City Center Hotel and Conference Center' (07/14/2015), and 'The Lauren Isely Resort' (07/13/2015).

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 Logout', and a search bar with the text 'Simpleview Hotel and Conference Center'. A teal sidebar menu is open, listing options: Listings, Special Offers, Calendar of Events, Media, Occupancy, and Materials Request. A red arrow points to the 'Collateral' icon at the top of the sidebar. The main content area features two summary cards: 'Listing Click Throughs' (0) and 'Offer Views' (0). To the right is a 'Post Board' with two posts: 'Kara's Eco Hotel' (dated 07/28/2015) and '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' selected, showing 'Manage your Opportunities' and a list of 'RFPs', 'Media Leads', and 'Service Requests'. A red arrow points to the 'Opportunities' icon. The main content area displays two cards: 'Listing Click Throughs' (0) and 'Offer Views' (0). A 'Post Board' on the right shows 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 displays the Simpleview Extranet interface. At the top, the 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. On the left, a vertical sidebar contains icons for Home, Profile, Reports (highlighted with a red arrow), Dashboard, 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)**  [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**

# 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 management menu is open, showing options for 'Columns', 'Filters', and 'Ordering'. The 'Filters' option is selected, and the menu displays a list of available filters: 'Account', 'Arrival (Preferred)', 'Create Date', 'Decision Date', 'Departure (Preferred)', 'Group Type', and 'Lead ID'. The 'Create Date' and 'Group Type' filters are currently selected and highlighted in green. The 'Create Date' filter has a dropdown menu set to '-All Dates-'. The 'Group Type' filter has a dropdown menu set to 'CHOOSE'. The menu also includes the text 'Choose Available Filters and their default values'.

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:

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

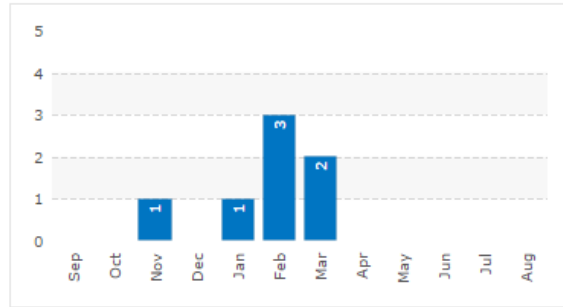


FROM  
**Month**  
September

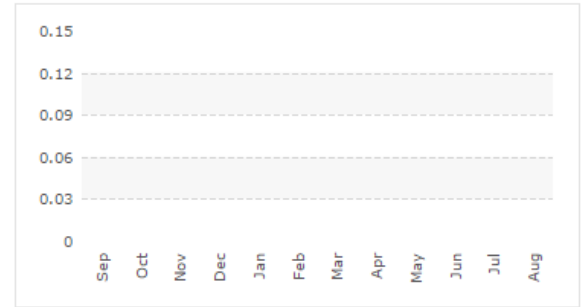
**Year**  
2014

### Listings [See Details](#)

Views ▾

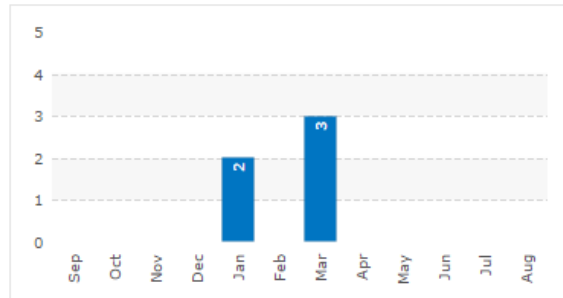


### Offers [See Details](#)



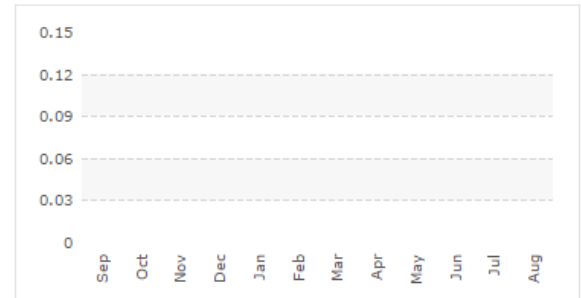
### Press Mentions [See Details](#)

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: 1

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

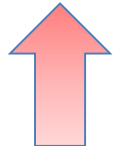
+ Filters (0)

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:

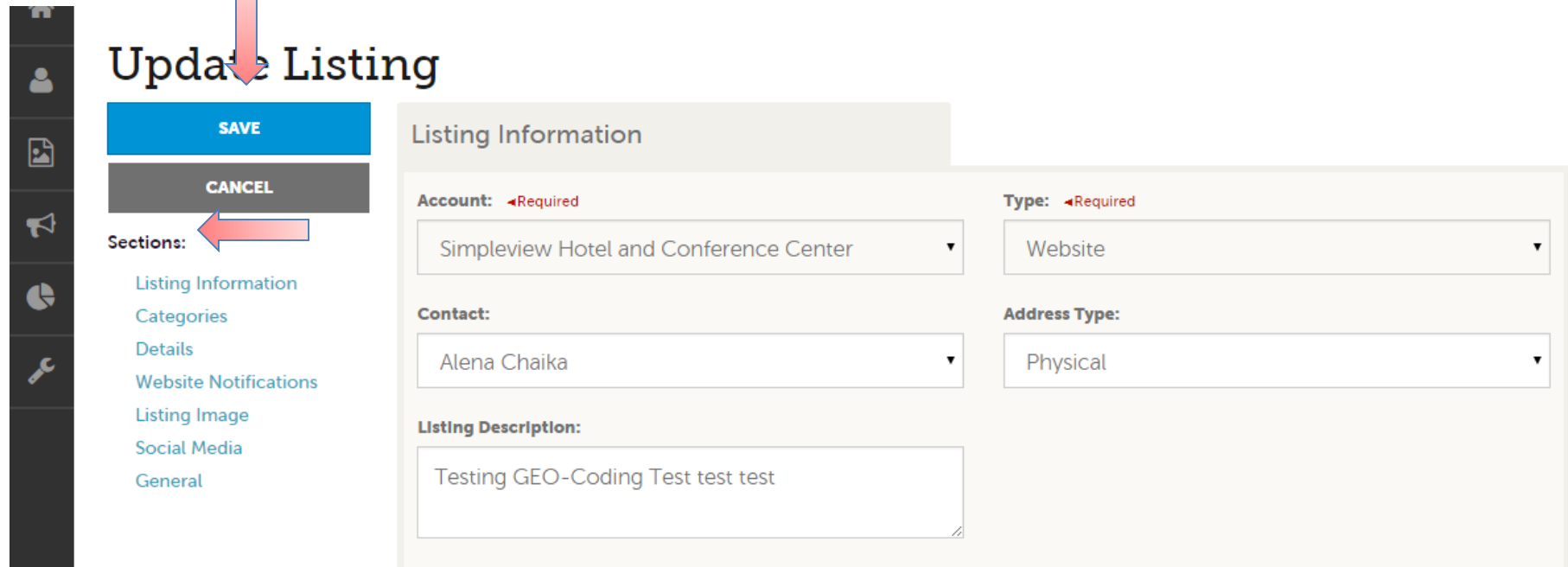
Actions	Company	Listing Type	Category	SubCategory	Listing ID	
 	Simpleview Account	Website	Business Services	Advertising & Marketing	1343	



Page 1 of 1 Go to Page:

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)

**SAVE**

**CANCEL**

Sections:

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

Email To Notify:

Notification Interval:

Listing Image

Listing Images:

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)

**Update Event**

**SAVE** **CANCEL**

**Sections:**

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

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

**Title:** Required  
Simpleview Festival

**Featured:**  
 YES  NO

**Contact:**  
Shawn Wilkins

**Description:**  
<p>This is the Simpelview Festival event description. &nbsp;&nbsp;&nbsp;<span>This is the Simpelview Festival event description. </span></p>

**Admission:**

**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 top left will display an Edit button. If you are editing an event, the top left button will say Save. **IMPORTANT NOTE:** Any edits or adding of events will require approval from Visit Estes Park. Upon saving your updates, Visit Estes Park will be notified of your changes/adds.

# 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  Week(s) on

Recurrence End

No End Date

End after  occurrences

End on

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

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 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

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 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 displays a web interface for managing media. On the left, a dark sidebar contains a wrench icon and a 'Sections:' menu with 'Media Information' selected. The main content area features a blue 'SAVE' button and a grey 'CANCEL' button. Below these are three sections: 'Image' with a dropdown menu, 'Description' with a text area, and 'File' with 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 the dashed box are 'BROWSE' and 'REMOVE' buttons, and a note: 'You can drag a file to the page to replace this file or use the "Browse" button'. At the bottom, the 'Listings:' section has a dropdown menu labeled 'CHOOSE AMONG THE FOLLOWING...'. Red arrows point to the 'BROWSE' button and the 'Listings:' 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.

# Collateral – Occupancy


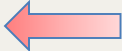


**Occupancy**

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:

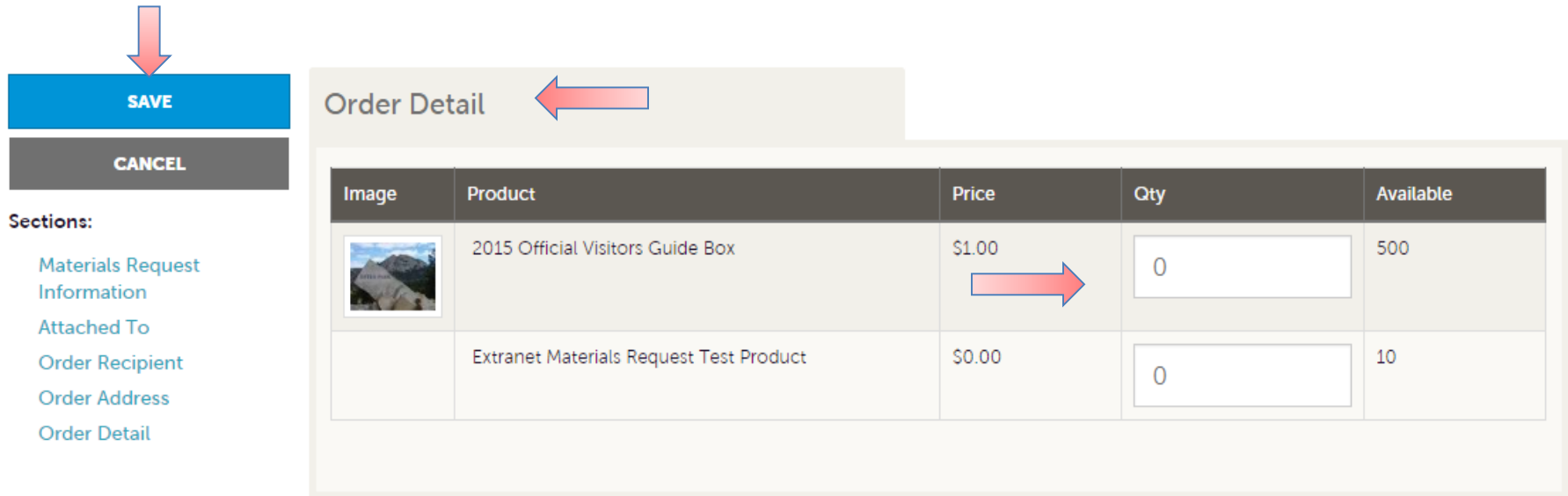
[ADD MATERIALS REQUEST](#) Page 1 of 1 Go to Page: 1

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)

The screenshot displays a software interface for managing RFPs. On the left, a dark grey button labeled 'RETURN' is positioned above a vertical navigation menu. The menu lists several sections: 'Lead Information', 'Meeting Dates', 'Additional Lead Information', 'Room Summary', 'History/Futures', 'Notes', 'Responses', 'Signage', 'General', and 'Room Data'. A red arrow points to 'Lead Information'. The main content area on the right contains the following sections: 'Meeting Requirements' (with contact info: 'crm@simpleviewinc.com' and '123.123.1234' and a note 'See attached RFP for more details.'), 'Schedule of Events', 'Action Requested', 'Comments', 'Competitive Sites', 'Meeting Specs' (with attachment '2016-Annual-Convention-RFP.docx'), 'Lost Business Code', and 'Lost Comments'. Red arrows point to the 'See attached RFP...' text and the '2016-Annual-Convention-RFP.docx' attachment.

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 a user interface for managing RFP responses. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' menu with four options: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. The 'File Attachments' option is highlighted with a red arrow. The main content area is divided into two sections. The top section is a summary table with the following data:

Total	0	0	0	0	0
Requested	10	10	10	10	10

The bottom section is titled 'File Attachments' and contains an 'ATTACH FILE' button, the text 'or drag files to the page', and a message box stating 'No files have been attached'. Red arrows point to the 'ATTACH FILE' button and the text 'or drag files to the page'.

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:

**APPLY FILTERS**

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

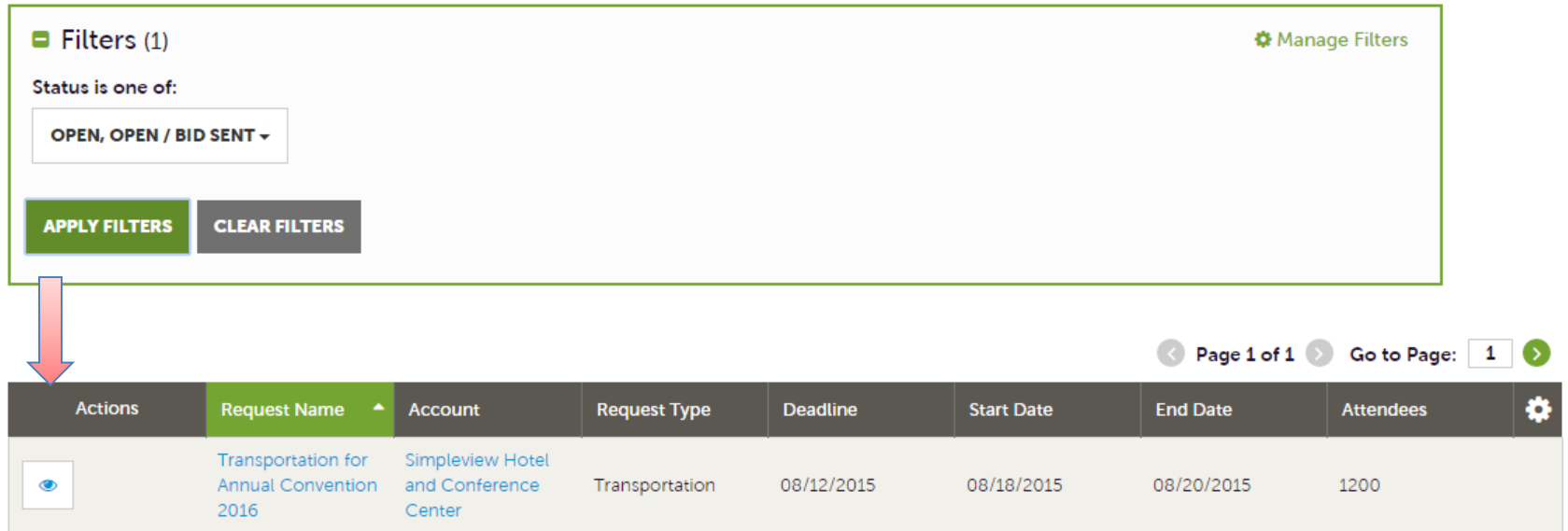
Simpleview Hotel and Conference Center ▼

**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 several icons, with a red arrow pointing to the RFP icon. The main content area features a filter section with a dropdown menu set to 'OPEN, OPEN / BID SENT'. Below the filter are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons. A red arrow points from the 'APPLY FILTERS' button to a table of service requests. The table has columns for Actions, Request Name, Account, Request Type, Deadline, Start Date, End Date, and Attendees. The first row shows a request for 'Transportation for Annual Convention 2016' at the 'Simpleview Hotel and Conference Center'.

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 web 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". A red arrow also points to a pencil icon in the "Actions" column for the first row.

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


Below the table is a "General" section. On the right, a modal window titled "Response for Simpleview Hotel and Conference Center" is open. It features a "Pursuing:" section with a red arrow pointing to a "Required" label and two radio buttons labeled "YES" and "NO". Below this is a "Comments:" section with a "Required" label and a text input area.

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!



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

For any questions or if you are in need of  
help while using OLIVE, please contact

Abi Huebner

at (970)586-0500 x 1223 or

[ahuebner@visitestepark.com](mailto:ahuebner@visitestepark.com)