

# Richmond Region Connect Tutorial

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#### Login – Logging In/Getting Started

#### Logging In:

- 1. Click on the link, to log into Richmond Region Connect <u>http://extranet.richmond.simpleviewcrm.com/login/index.cfm</u>
- 2. Your username is your e-mail address.
- 3. Your password is the temporary password that was e-mailed to you.
- 4. You will be asked to change your password to one of your

preference.

5. Problems getting into your account? Contact Richmond Region Tourism at <u>sjiggitts@visitrichmondva.com</u>

C extranet.richmond.simpleviewcrm.com/login/index.cfm	
<b>Richmond Region Connect</b>	
WEARE	Username:
RICHHOND REGION TOURISM	Password: Remember Username:
	Login

#### **Partner Bulletins**

When logging on to Richmond Region Connect, the first page you will see is Partner Bulletins. This page was created so that you can receive announcements from Richmond Region Tourism.

← → C 🗋 extranet.r	chmond.simpleviewcrm.com/partnerBulletins/index.cfm		*
Richmond Region	1 Connect	Welcome, Michael Spurlock - Logged in to: Richmond Region Tourism 🔻	LOGOU
Partner Bulletins M	ember Record		
			V
	Par	tner Bulletins	
Search Messages	Recent Messages		
All Categories Enter Search Keyword Search	▼ June Meeting, Convention, and Sports Events (No Please see attached list of upcoming events. We're all v doors. more >> ✓ June 2015.pdf	t <b>Read)</b> ery excited about the events coming to the Region this summer and are here to	06/01/2015 help drive business to your
Message Categories <u>RRT Events (1)</u>			
Versio	Partner Bulletins   Member Record n 3.0, Copyright ©2003-2015 simpleview, inc. All rights reserved.	simpl	eview <u></u>

#### Leads – Primarily sent to hotels

- To view the leads that have been sent to you, click the "Leads" tab.
- When viewing Leads, use the filters to focus your search
- With the Status Filter, you can choose New Leads, Pending Leads (Leads that have not been booked definite for Richmond, or been lost to another destination) and Closed Leads; either closed/won (your property was awarded the business) or closed/lost (another destination was selected).
- With the Group Filter, you can choose between Meeting Sales and Tour/Travel Leads and with the Responses Filter, you can choose between leads you have already responded to with the Yes option, or Leads which still require a response using the No option.

Richmond Re	egion Con	nect		Welcome, Sarah Hunter	- Logged in to: Richmo	nd Region Tourism	7		LOGOUT
Partner Bulletins	Leads	Member Record	Service Requests	Reports					
			ALL	LEADS - CURRENTLY 5 IN VI	EW				
Filter: New	▼All Groups	▼All Responses ▼	Search By Keyword				К ∢	Page 1 of :	() → н  ф
		Starts Wit	h: A   B   C   D   E   F	G H I J K L M N O P Q R S T	U   V   W   X   Y   Z   Oti	her   All		_	
Lead Type	Opportunity ID	Opportunity		Organization	Hotel Response Date	Arr/Dept Dates 🔻	Status	Responded	Create Date
Conv/Meeting Sales	<u>15567</u>	ACCED-I 39th Annual (	<u>Conference</u>	Association of Collegiate Conference & Events Directors-International (ACCED-I)	07/08/2015	Mar 27-Apr 3, 2019	New	No	06-05-2015
Conv/Meeting Sales	<u>14983</u>	2017 U.S. Baseball Cha	ampionships	Triple Crown Sports	07/30/2017	Jul 20-30, 2017	New	No	01-15-2014
Conv/Meeting Sales	<u>14982</u>	2016 U.S. Baseball Cha	ampionships	Triple Crown Sports	09/02/2015	Jul 21-31, 2016	New	No	01-15-2014
Conv/Meeting Sales	<u>15442</u>	2015 Mid-Atlantic Regi Championships	onal	US Quidditch	08/31/2015	Oct 30-Nov 1, 2015	New	No	02-25-2015
Conv/Meeting Sales	<u>15537</u>	Harris Family Reunion	2015	Harris Family Reunion	06/30/2015	Oct 16-19, 2015	New	No	05-18-2015
		Starts Wit	h: A   B   C   D   E   F	G H I J K L M N O P Q R S T	U   V   W   X   Y   Z   Oti	her   All			
Number of Results:	25 🔻						<b>₩</b> •   1	Page 1 of :	() н  ф

#### Responding to a Lead

Please read the Lead carefully for information on the client's specifications and instructions from the sales manager on how to respond to the lead.

### All leads have a Hotel Response Date. After this date has passed, you will not be able to respond to a lead.

- 1. To respond to a Lead, click "Add Your Response" at the bottom of the lead.
  - a. If the client has provided multiple date options, they will appear as *Primary* and *Alternate*. Please respond to <u>all</u> sets of dates listed.

			Responses	_
/	Add/Edit	Meeting Dates	Room Request Dates	Responded
	Add Your Response	10/30/2015 - 11/01/2015 (Primary)	10/30/2015 - 10/31/2015	No Response Entered

2. Indicate if you are pursuing the Lead by clicking Yes or No.

## \*\*Note: Mandatory fields to be filled are highlighted in **Red** those fields will change based on the option you select.

- 3. If you <u>are not</u> pursuing a Lead, click the No button.
  - a. Indicate in the Comments box why you are not responding to the Lead (i.e. dates/space not available, requirements cannot be accommodated, etc.).
  - b. Scroll to the bottom and select from the dropdown "Reason Not Pursing." You <u>will not</u> be able to "Save" your response without doing so.
  - c. Click "Save" when finished.
- 4. If you <u>are</u> pursuing a Lead, click the Yes button.
  - a. In the Comments box, enter specific information you want the client to see, such as rates for each room type, special services or amenities you propose to offer, general information about your property/venue, etc.
  - b. Enter the rate you are offering.
  - c. *Skip* the requested rooms and peak room night boxes as they will fill in automatically when you fill out the per day block.
  - d. Enter the per day block for the dates you have available at your property.
  - e. Click Save when finished.

#### \*See Lead Example Form on next page\*

			Response	Information			
Pursuing	) this lead? O Yes @	No					
These comments may be sen Please attach your formal j in the file attach This section is not	comments: to the client. resposal below ments section. for proposals.		Comments enter field <u>may</u> be seer	ed into this 1 by the client.			
Bureau-Only These comments will not client; they will only be seen Richmond R	Comments: be seen by the by the staff egion Tourism.		Comments ent field <u>will</u> only I Staff.	ered into this be seen by RRT		<i>h</i>	
Reque	Rate Range 0 sted Rooms 0	to o			Peak Night Rooms	0	
		_	Room I	nformation	_	_	
Any Singles Doubles Suite 1 Suite 2	Monday 08/17/2015 0 0 0 0 0 0	Tuesday 08/18/2015 0 0 0 0 0 0	Wednesday 08/19/2015 0 0 0 0 0 0	Thursday 08/20/2015	Friday 08/21/2015	Saturday 08/22/2015	Sunday 08/23/2015
Requested	16	66	66	0	0	0	0
File Attachm	ents:None Add Vi	iew Remove	File Att	achments			
	_		Additional	Information			
Person Responding to Double Room Single Room	Lead Rate <sup>\$</sup>		Ge	neral Reason Not Pur Suite Room King Room	Rate Hotel Only Lead Inadequate Space Lack of Availability Rate Sensitive Pattern Undesirabia Concession Undesir	able	Only applicabl when selecting "No" pursue option
Pa	artner Bulletins   Lea /ersion 3.0, Copyright ©200	ads   Member Record	Service Requests		5	simple	view 🙏

#### Attaching Your Proposal to a Lead

You have the ability to attach your property's proposal to your response.

1. Under the File Attachments section, click "Add."

File Attachments							
File Attachments:	None Add View Remove	*					
			Additional Information				

2. Another window will appear; click "Choose File."



3. Find your document, click "Open."

File Upload								?>
Look in:	📋 My Documen	ts	*	0	ø	P 🖪	-	
My Recent Documents Desktop My Documents	Accreditation ACT Bluetooth Competitive CI Competitive CI Doug Downloads Enal Active EMP SlideMake Equipment Fax History	ies ientral r2	Marketing MindApp My Data Sources My Frayments My Google Gadgets My Music My Nusic My Nucebook My Pictures My Videos Project Managemeni Project Managemeni Research	t				
My Computer	InfoPath		Sales					>
My Network	File name: Files of type:	Catholic Diocese Data.xls All Files				<b>~</b>		Open Cancel

4. Once your select a file, then **be sure to click "Add File"** <u>before</u> closing the second window to save and attach the file.



5. Once your file is attached, click "Save" to save the lead.

#### **Viewing/Editing Your Member Record**

- 1. Listings
- 2. Web
- 3. Amenities
- 4. Social Media
- 5. Benefit Summary
- 6. Contacts

#### <u>Listings</u>

Listings are descriptions used on VisitRichmondVa.com for visitors and meeting planners to view information and photos about your organization.

🗕 🔶 C 🗋 extrance	et.richmono	d.simpleviewcr	m.com/men	n/accts/inde	x.cfm#	#tab:2						*
Richmond Regi	ion Con	nect				Welc	ome, Michael Spurk	ck - Logged in	to: Richmond	Region Tourism		LOGOUT
Partner Bulletins	Member R	tecord										
			4	ACCOUNT	DET/	AIL: RICH	MOND REGIO	N TOURI	ISM			
	_	_	_	_		Account In	formation	_	_	_		_
Account ID: 1031         Status: Active           Account: Richmond Region Tourism         Region: Downtown           Account (sort): Richmond Region Tourism         Email:												
Form	nerly: RMCVI	В						web Site:	www.visitrich	mondva.com		
	_		_	_		Phone/Fax	Numbers	_				
Prin Toll	nary: (804) Free: (800)	) 782-2777 ) 370-9004						Alternate: Fax:	(804) 780-25	577		
	-		-	_		Address In	formation	-		_	_	
401 North 3rd Street Richmond, VA 23219 UNITED STATES	Physical Ad	dress		401 North Richmond, UNITED ST	3rd Sti VA 23 ATES	Billing / reet 219	Address		401 North Richmond, UNITED ST	Shippir 3rd Street VA 23219 TATES	ig Address	
	_	_	_	_		Addition	al Fields	_	_	_	_	_
						Gen	eral					
Jurisdi	ction Richn	nond					D	TN Program				
Contacts Listings W	Offer /eb Ameni	ties Benefits S	Summary S	ocial Media		Partner	Offers					V
											Α	dd New Listing
Filter: All Listings	<ul> <li>Any Type</li> </ul>	T								I	✓ Page 1	of 1 📔 🕨 🕅 🗘
рт	ype 🛆	Category	Sub	Category	Ran	k Listing						
Action	ing ID	Туре 🔉	Catego	ry		SubCate	egory	Rank	Listing			
/ 🖻 58	<u>6</u>	<u>Website</u>	Accomm	nodation	s	Hotels			THIS IS	A SAMPLE LI	STING DO	NOT USE

(Edit Listing)

#### **Editing/Adding a Listing:**

To create a new listing, click the Add New Listing button on the right. To update an existing listing, click on the pencil icon under Action column.

- 1. After Clicking "Add New Listing" or the pencil icon to edit a listing, you will be prompted to fill in the following fields.
- 2. The type of listing is "Web Site."
- 3. Address: If you would like to display the main address on your account on the Web Site, choose "physical" from the drop down menu. Or enter the address you would prefer to display.
- 4. Contact: Edit the Contact responsible for this listing.
- 5. Category: This is the main category your listing will be found under on our Web site.
- 6. Subcategory: This is the sub-category your listing will be found under on our Web site. Category and additional subcategories can only be edited by Richmond Region Tourism staff. If you believe this info needs to be edited for an existing Listing, please contact Richmond Region Tourism.
- 7. Optional Fields: For any of these fields, if you would like different info to show on the listing, than what is in your Partner Record, click Overwrite. You can then enter what you would like to display in the listing. If you would simply like to hide the piece of info, click overwrite and leave the overwrite with field blank. For example if your listed address is a PO BOX and you wanted to change to your physical address, click overwrite on the address fields and fill them in as needed.
- 8. To receive a notification email when a certain number of visitors to the Richmond Region Tourism website view your listing page, enter the email address you would like the notification sent to, and pick the threshold for the number of views to trigger the notification.
- 9. Lastly, complete any fields available in the Additional Information section. This section may change from time to time, so contact Richmond Region Tourism with any questions about included info.
- 10. Once complete, click Save to submit your changes, or cancel to return to the Member Record page. Remember to update your listings at least once a quarter and to update your contacts under the Contacts tab with any changes as they occur.

← → C 🗋 extranet.ric	chmond.simpleviewcrm.com/	mem/listings/index.cfm?action=f	orm&acctid=1031	
Richmond Region	Connect	Welco	ome, Michael Spurlock - Logged in	to: Richmond Region Tourism 🔻
Partner Bulletins Me	ember Record			
	L	ISTING: NEW LISTING FOR F	RICHMOND REGION TO	URISM
		Save	Cancel	
		Colored Fields	are Required	
		Listing In	formation	
Туре:	Choose One 🔻			
Company:	Richmond Region Tourism		Contact:	None
Category:	Please choose Type first 🔻		Address Type:	Account: Physical 🔻
SubCategory:	Please choose Category first	T		
Listing:				
				1

			Listing Details	
Field O	verwrite	? Account Value		Overwrite with
Company:		Richmond Region Tourism		
Company (sort):		Richmond Region Tourism		
Address Line 1:		401 North 3rd Street		
Address Line 2:				
Address Line 3:				
City:		Richmond		
State:		VA		
Zip:		23219		
Country:		UNITED STATES		
Email:				
Web Site:		www.visitrichmondva.com		
Primary Phone:		(804) 782-2777		
Alternate Phone:				
Fax:		(804) 780-2577		
Toll Free:		(800) 370-9004		

#### Web (Coupons and Media)

When you log into your account page, under the Member Record Tab, locate the "Web" tab at the bottom left of the page. It is located next to your "Listings' tab. When you choose this tab you will see a Coupons and Media Tab.

Partner Bulletins Lead	s Member Record	Service Requests	Reports					
			ACCOUNT DE	FTATI: RICHM	IOND REGION TOURISM			
				Account In	formation			
Accou	nt ID: 1031				Statu	Active		
Ac	ount: Richmond Reg	ion Tourism			Regio	Downtown		
Account	sort): Richmond Reg	ion Tourism			Ema	la l		
F	arent:				Web Sit	: www.visitrichmondva.com		
For	merly: RMCVB							
				Phone/Fax	Numbers			•
Pr	mary: (804) 782-273	77			Alternat			
Tol	Free: (800) 370-900	04			Fa	:: (804) 780-2577		
				Address In	formation		_	
	Physical Address			Billing A	ddress		Shipping Address	
401 North 3rd Street			401 North 3rd Street			401 North 3rd Street		
Richmond, VA 23219			Richmond, VA 23219			Richmond, VA 23219		
UNITED STATES			UNITED STATES			UNITED STATES		
				Additiona	al Fields			
				Gene	eral			
Juriso	iction Richmond				DTN Progra	n		
				Partner	Offers			
	Offer							
Listings Web Amenities	Social Media Benefi	ts Summary Contacts						
Coupons Media								

#### **Coupons and Deals**

Here you can add any coupons, deals or packages your property offers. We strongly encourage coupons be specific offers for better results.

- 1. To add a new coupon, click the "Coupons" Tab under the "Web" Tab.
- 2. Click the "Add New Coupon" button.

- 3. First, give the offer a compelling, concise title, add a web link if you have one, and put in your offer text.
- 4. Add any available images to your offer, images should be loaded separately before creating the coupon.
- 5. Add in the dates the offer is valid as the Redeem From/To fields, and the dates the offer should appear on the web as the Post From/To. We recommend deals and coupons that are good for a year-long range expiration date.
- 6. Lastly, select which of your Web listings the coupon should be attached to, then click Save.

Contacts Listings Web	Amenities Benefits Summa	ry Social Media				
Coupons Media						
<b>•</b>						Add New Coupon
Filer: All Coupons 🔻	Any Type				14 4	Page 1 of 1 > N Q
Action	Offer Title N	Pending	Redeem Start	Redeem End	Post Start	Post End
ond Re	New Coupon		Welcome, Mid	naiel Spurlock - Loggel in	tes	
Bulletins		COUPON: NE	EW COUPON FOR RICHM	OND REGION TOU	JRISM	<b>^</b>
			Save Save & New Coupo	n Close		
. Acci		_	Coupon Informat	ion		
Accoun	Offer Title:					
F	Offer Link:					
¢ (T)	Offer Text:					
h 3rd Stree						
I, VA 2321 STATES			Coupon Image			
	•			Selected Imag	ge:	

#### <u>Media</u>

Here you can add any images or logos you would like to be displayed with your listing on the website.

- 1. To add a new logo/image, click the "Media" Tab under the "Web" Tab.
- 2. Click the "New Logo/Image button."
- 3. First, note the size requirements posted next to the image type and make sure your image is sized correctly before uploading. The dimensions of the image should be at least **200 X 150 pixels at 72 dpi** for optimum quality.
- 4. Give your image a title.

5. Click Browse to search for your file, find and select your file and click Open. Select the listings that the image should be attached to, and click Save. If uploading multiple images, you can click Save & New Media and the current image will be uploaded, and the form will reappear so you can upload the next image. We encourage you to upload different images for different types of listings as appropriate. This is also where you will upload images for coupons and deals. Remember to change your images seasonally.

Contacts	Listings	Web	Amenities	Benefits Summary	Social Media						
Coupons	Media										
									$\rightarrow$	New Lo	ogo/Image
Filter: All	Туре	•							M 4 [1	Page 1 of 1	P N O
Action	Гуре	Title	x	Filename		Cr	reated By	Created	Last Updated By	Last Updated	Sort Order

nd Re <mark>r</mark>	lew Logo/Image		Welcome, Michael Spurlock - Logged in to:	
ulletins			MEDIA: NEW MEDIA FOR RICHMOND REGION TOURISM	
			Save & New Media Close Colored fields are required.	
ACCO			Media Information	
Accoun	Туре:	Image 🔻	The max width: 500px, max height: 500px for all logos and images.	
F	Title:			
F	Upload {0}:	Choose File	No file chosen	
Т			Add To Listing(s)	
	Richmond Region T	ourism (Web	site: Accommodations: Hotels) - ListingID: 3586	
3rd Stree VA 2321			Colored fields are required. Save & New Media Close	

#### **Amenities**

Amenities are characteristics of your property and are very important to keep up to date. These are often used by Meeting and Tour Planners to select properties for Meetings, Conventions, and Group tours. Be sure to fill out all applicable info for your organization.

Amenities Tabs:

- 1. General
- 2. Restaurant
- 3. Accommodations
- 4. Sporting Venue
- 5. Student Performance Venue
- 6. Parks and Recreation
- 7. Meeting Facilities

← → C 🗋 extran	et.richmond.simple	eviewcrm.com/me	m/accts/index.cfm#tab:7			*
Richmond Reg	on Connect		Welco	ome, Michael Spurlock - Logged in	to: Richmond Region Tourism 🔻	LOGOUT
Partner Bulletins	Member Record					
		A	CCOUNT DETAIL: RICH	MOND REGION TOUR	ISM	
			Account I	nformation		
Accour	t ID: 1031			Status:	Active	
Account (	ount: Richmond Reg	ion Tourism		Region:	Downtown	
Pa	rent:	non rourism		Web Site:	www.visitrichmondva.com	
Form	erly: RMCVB					
			Phone/Fa	x Numbers		
Prin	ary: (804) 782-27	77		Alternate:		
Toll	Free: (800) 370-90	004		Fax:	(804) 780-2577	
	_	_	Address I	nformation		-
1	Physical Address		Billing	Address	Shipping Address	
401 North 3rd Street			401 North 3rd Street		401 North 3rd Street	
UNITED STATES			UNITED STATES		UNITED STATES	
			Addition	al Fields		
			Gen	eral		
Jurisdi	tion Rich nond			DTN Program		
			Partne	r Offers		
	Offer					
Contacts Listings W	eb Amenities Be	enefits Summary	Social Media			
General Restaurant	Accommodations	s Sports Venue	Student Performance Venue	Parks and Recreation Meet	ting Facilities	
			AMENITIES F			
			AMENITIEST	OR GENERAL		
			Edit An	nenities		
			Gen	eral		-
Parking Fee Inform	ition :			Student Friendly:	No	
Pai	king:			Attraction Hours:		
Handicapped Acces	sible: No			Distance to Airport:		
Potorcoach Group Frie	ndly: No			Motorcoach Parking on Site:	No	
Smo	king: No			need countraining of bite.		
Hours (General Informa	tion):					
Attraction	Fee:					

Please note: Not every field will apply to your organization. Please fill in all necessary fields.

#### <u>General</u>

- 1. Under the "Amenities" Tab, click on the "General" Tab.
- 2. To update your information click "Edit Amenities." A new window will then open for you to make any changes needed. Red fields are required info, when finished, click save to submit, or close to go back
- 3. Be sure to click "Save" when finished.

Contac	ts Listings Web	Ame	nities P	enefi	its Summary	Social M	ledia				
Genera	al Restaurant	Accom	modatio	15	Sports Venue	Stude	nt Performance Venue	Parks	and Recreation	Meeting	Facilities
							AMENITIES	FOR O	GENERAL		
T							Edit	Amenitie	25		
_									_		
Pa	rking Fee Information	1:					G	enerai	Student F	riendly: No	0
	Parking	g:							Attraction	1 Hours:	-
Н	andicapped Accessible	e: No							Distance to	Airport:	
Moto	rcoach Group Friendly Det Friendly	/: No						Mot	Maximum Gro	up Size:	
	Smoking	1: NO						MOU	orcoach Parking	on site: No	5
Hours	(General Information	):									
	Attraction Fee	e:									
Poil	тепу: кмсув					·					
F											
Т					AMENITI	S: UPDA	IE AMENITIES				
						Save C	ose				
		_		_	Co	lored fields are	required.				
rd Stree /A 2321	Parking Fee Infor	mation:				Gene	Student Friend	v: 🔍 Yes	• No		
TES			Valat				Attraction How			1	
	٢	arking:	For a Fee				Attraction Hour	5.			
			Free Motorcoa	:h -							
Juri	Handicapped Acc	essible:	• Yes	No			Distance to Airpo	rt:			
	Motorcoach Group Fi	riendly:	• Yes	No			Maximum Group Siz	e:			_
	Pet Fi	riendly:	• Yes	No			Motorcoach Parking on Sit	e: Yes	• No		
istings	Sr	nokina <sup>.</sup>	Ves	No							
Restaura	Hauna (Cananal Inform										_
	Hours (General Inform	nation ):									
										11	
	Attracti	on Fee:									
Fee Info											
					Co	lored fields are	required.				
apped Ac h Group I				_		Save C	ose				
Pet I							_				
s eral Infor											
Attract											
											ieı
	(										+
											×

#### <u>Restaurant</u>

Information provided in this tab includes:

- Number of restaurants on premises
- Whether you provide breakfast, lunch, dinner or brunch
- If you have outdoor or private dining available
- Whether you recommend reservations

- Price range (\$= most entrees under \$10, \$\$= most entrees under \$15, and \$\$\$= most entrees over \$15)
- 1. Under the "Amenities" Tab, click on the "Restaurant" Tab if your property falls under this category.
- 2. To update your information click "Edit Amenities." A new window will then open for you to make any changes needed.
- 3. Be sure to click "Save" when finished.

### Any changes made will be sent to a Richmond Region Tourism representative for approval.

Contacts L	istings	Web	Amenities	Benefits Summary	Social Media			
General	Restaurai	nt A	ccommodat	ions Sports Venue	Student Performance	Venue Parks and Recreation	Meeting Facilit	ties
	1					IES FOR RESTAURANT Edit Amenities		
						Restaurant		
		Lunch:	No			#	of Restaurants:	
	B	Brunch:	No				Open Table:	
	[	Dinner:	No			Offer limited menu for groups	with price point:	No
	Outdoor	Dining:	No			Group Reservations Accepted on S	Sat./Sun. Night:	No
Priv	ate Dinin	g Area:	No				Breakfast:	No
Reservations	Recomm	ended:	No				Buffet:	No
Maxim	num Occu	pancy:					Allow Buy-out:	No
Restaur	ant Price	Range:				Maxim	um Group Size:	

id Reg	gion Connect				
illetins		AMENIT	IES: UPDATE AMENITIES		
		$\rightarrow$	Save Close		
Acco			Colored fields are required. Restaurant		
Accoun	Lunch:	🔍 Yes 🖲 No	# of Restaurants:		
F	Brunch:	🔍 Yes 🖲 No	Open Table:		
	Dinner:	🔍 Yes 🖲 No	Offer limited menu for groups with price point:	O Yes 🖲 No	
F T	Outdoor Dining:	🔍 Yes 🖲 No	Group Reservations Accepted on Sat./Sun. Night:	🔍 Yes 🖲 No	
	Private Dining Area:	🔍 Yes 🖲 No	Breakfast:	○Yes ® No	
	Reservations Recommended:	• Yes • No Reservations Recommended	Buffet:	○Yes ® No	
rd Stree (A 2321	Maximum Occupancy:		Allow Buy-out:	○Yes ® No	
ITES	Restaurant Price Range:	T	Maximum Group Size:		
			Colored fields are required.		
		$\rightarrow$	Save Close		
Juri					

#### **Accommodations**

- 1. Under the "Amenities" Tab, click on the "Accommodations" Tab if your property falls under this category.
- 2. To update your information click "Edit Amenities." A new window will then open for you to make any changes needed.
- 3. Here you are able to specify which amenities your property has. Check all that apply.
- 4. # of Hotel Rooms/Suites: Here you simply type in the number of rooms and suites your property has.
- 5. GDS# for ARES System: This is the number used for our online booking engine. This number will be put in the system by a Richmond Region Tourism representative and should not be changed.
- 6. Hotel Price Range: Choose your hotel's price range from the drop down menu.
- 7. Total Sleeping Rooms: Total rooms and suites at your property.
- 8. Be sure to click <u>Save</u> to ensure your changes are saved.
- 9. Once you click <u>Save</u>, your changes will then be sent to a Richmond Region Tourism representative for approval.

Contacts	Listings Web	Amenities	Benefi	ts Summary	Social Media				
General	Restaurant	Accommodat	ions	Sports Venue	Student Per	ormance Venue	Parks and Recreation	Meet	ing Facilities
		1			AME	NITIES FOR	ACCOMMODATION	IS	
						Accomi	nodations		
	Hotel Price Rang	e:					Outdoo	r Pool:	No
	# of Hotel Room	s:					Indoo	r Pool:	No
	Total King Room	s:					R	esort:	No
T	otal Double Room	s:					Convention	Hotel:	No
	# of Hotel Suite	es:					Full Se	ervice:	No
	International Rat	e:					Limited Se	ervice:	No
	AAA Leisure Rat	e:					Bed & Brea	kfast:	No
GDS#	# for ARES Syster	m:					Interior Cor	ridors:	No
Tot	tal Sleeping Room	s:					Baggage Har	dling:	No
	Gym Acces	s: No					Airport Sh	uttle:	No
	Room Servio	e: No						Spa:	No
Compli	mentary Breakfa	st: No					Hote	el Bar:	No
	Book Onlin	e: No					Pet Fri	endly:	No

Fo	ormerly: RMCVB				
F			S: UPDATE AMENITIES Save Close red fields are required.		
3rd Stree		Acc	commodations		
VA 2321 ATES	Hotel Price Range:	<b>•</b>	Outdoor Pool:	🔍 Yes 🖲 No	
	# of Hotel Rooms:		Indoor Pool:	🔍 Yes 🖲 No	
	Total King Rooms:		Resort:	🔍 Yes 🖲 No	
Juri	Total Double Rooms:		Convention Hotel:	🔍 Yes 🖲 No	
	# of Hotel Suites:		Full Service:	🔍 Yes 🖲 No	
	International Rate:	\$	Limited Service:	🔍 Yes 🖲 No	
Listings	AAA Leisure Rate:	\$	Bed & Breakfast:	🔍 Yes 🖲 No	
Restaura	GDS# for ARES System:	GDS number for ARES	Interior Corridors:	🔍 Yes 🖲 No	
	Total Sleeping Rooms:		Baggage Handling:	🔍 Yes 🖲 No	
	Gym Access:	🔍 Yes 🖲 No	Airport Shuttle:	🔍 Yes 🖲 No	
Hotel Price	Room Service:	🔍 Yes 🖲 No	Spa:	🔍 Yes 🖲 No	
# of Hotel	Complimentary Breakfast:	🔍 Yes 🖲 No	Hotel Bar:	🔍 Yes 🛞 No	
al Double	Book Online:	🔍 Yes 🖲 No	Pet Friendly:	🔍 Yes 🖲 No	
# of Hote nternation AAA Leisu			red fields are required. Save Close		

#### **Sporting Venue**

This is where your information about the venue will be input, such as sports accommodated, number of playing surfaces, concessions, facility layout, type of sports venue, etc.

- 1) Under the "Amenities" Tab, click on the "Sports Venue" Tab if your property falls under this category.
- 2) To update your information click "Edit Amenities." A new window will then open for you to make any changes needed.
- Be sure to click <u>Save</u> to ensure your changes are saved. Any changes made will be sent to a Richmond Region Tourism representative for approval.

Contacts Listings Web Amenities	Benefits Summary	Social Media		
General Restaurant Accommoda	tions Sports Venue	Student Performance Venue	Parks and Recreation Meet	ing Facilities
	1	AMENITIES FO	OR SPORTS VENUE	
	_	Sporti	ing Venue	_
All Sports Offered: Restrooms: No Locker Rooms: No Concession Stand: No PA System: No Scoreboards: No Onsite Athletic Equipment: No			Total Seating Capacity Indoors Meeting Rooms Facility Layout Number of Parking Spaces Lights Mobile Sports Court Total Seating Capacity Outdoors	No No File Attached No No
Achiele Equipment Available.		Baseba	ll/Softball	
		Bas	sketball	_
	_	Fo	otball	_
		Soccer/Field	Hockey/LaCrosse	
	_	Swi	imming	
		T	ennis	
		Vol	lleyball	
		Othe	r Venues	

#### **Student Performance Venues**

This section is for any property allowing student group performances onsite.

- 1. Under the "Amenities" Tab, click on the "Student Performance Venue" Tab if your property falls under this category.
- 2. To update your information click "Edit Amenities." A new window will then open for you to make any changes needed.
- 3. Be sure to click "Save" when finished.

### Any changes made will be sent to a Richmond Region Tourism representative for approval.

Contacts List	ings Web Ame	nities Benef	its Summarv	Social Media		
General Re	staurant Accom	modations	Sports Venue	Student Performance Venue	Parks and Recreation Meeting Facilities	
				AMENITING FOR STUD	Amenities	
				Student Pe	rformance Venue	
Are performance Maximum Nu Maximum M Maximum Nu Maximum Nu Days Days are Tin	es held indoors, out mber of Band Perfor Number of Band Perfor Number of Choir Perfor mber of Choir Perfor Audience Se and Times Perform nes that are Best for Toll Free: (800) 370-5	idoors or both?: mers Standing: formers Sitting: formers Sitting: mers Standing; eating Capacity; ances are Held: r Performances;			Does a group need to apply for a performance? If yes, do you have a form you send out? Do you require an audition tape? Do you offer A/V equipment? If so, what kind?	: No : No : No : No
h 3rd Str d, VA 233 STATES	21		АМ	ENITIES: UPDATE AMENITIES Save Close Colored fields are required. Student Perform	nance Venue	
	Are performances h	reld indoors, outd	oors or both?:			
rt					Does a group need to apply for a performance?:	
	Maximum Numbe	r of Band Perform	ers Standing:		Does a group need to apply for a performance?: If yes, do you have a form you send out?:	
	Maximum Numbe Maximum Num	r of Band Perform ber of Band Perfo	ers Standing:		Does a group need to apply for a performance?: If yes, do you have a form you send out?: Do you require an audition tape?:	
	Maximum Numbe Maximum Num Maximum Numl	r of Band Perform ber of Band Perfo ber of Choir Perfo	rmers Standing:		Does a group need to apply for a performance?: If yes, do you have a form you send out?: Do you require an audition tape?: Do you offer A/V equipment?:	
Listing	Maximum Numbe Maximum Num Maximum Numl Maximum Number	r of Band Perform ber of Band Perfo ber of Choir Perfo r of Choir Perform	ers Standing: rmers Sitting: rmers Sitting: ers Standing:		Does a group need to apply for a performance?: If yes, do you have a form you send out?: Do you require an audition tape?: Do you offer A/V equipment?: If so, what kind?:	
Listing Restau	Maximum Numbe Maximum Num Maximum Numl Maximum Number	r of Band Perform ber of Band Perfo ber of Choir Perfo r of Choir Perform Audience Sea	ers Standing: rmers Sitting: rmers Sitting: ers Standing: ting Capacity:		Does a group need to apply for a performance?: If yes, do you have a form you send out?: Do you require an audition tape?: Do you offer A/V equipment?: If so, what kind?:	
Listing Restau	Maximum Numbe Maximum Num Maximum Numbe Maximum Number Days and	r of Band Perform ber of Band Perfo ber of Choir Perfo r of Choir Perform Audience Sea I Times Performan	ers Standing: rmers Sitting: rmers Sitting: ers Standing: ting Capacity: caces are Held:		Does a group need to apply for a performance?: If yes, do you have a form you send out?: Do you require an audition tape?: Do you offer A/V equipment?: If so, what kind?:	
Listing Restau mances h m Numbe	Maximum Number Maximum Numi Maximum Numi Maximum Number Days and Days are Times to b	r of Band Perform ber of Band Perfo er of Choir Perform Audience Sea I Times Performan that are Best for P	ers Standing: rmers Sitting: rmers Sitting: ers Standing: ting Capacity: capacity: ereformances:		Does a group need to apply for a performance?: If yes, do you have a form you send out?: Do you require an audition tape?: Do you offer A/V equipment?: If so, what kind?:	

#### Parks and Recreation

This section is for any property that may be considered a park or used for recreational activities

- 1. Under the "Amenities" Tab, click on the "Parks and Recreation" Tab if your property falls under this category.
- 2. To update your information click "Edit Amenities." A new window will then open for you to make any changes needed.
- 3. Be sure to click "Save" when finished





#### **Meeting Facilities**

This section is for any property with meeting rooms on the premises.

- 1. Under the "Amenities" Tab, click on the "Meeting Facilities" Tab if your property falls under this category.
- 2. To add a new meeting room, click "Add New Room."
- 3. A new window will open allowing you to add the room name, square footage, height, width and length, capacity, and whether the room is an amphitheater and has listening devices available.
- 4. Be sure to click "Save" when finished

#### Any changes made will be sent to a Richmond Region Tourism representative for approval.

Contacts Listings Web A	menities Ber	nefits Summary	Social Media					
General Restaurant Acc	ommodations	Sports Venue	Student Performan	e Venue	Parks and Recreation	Meeting Facilities		
				Standard	d Amenities			
Number of Rooms:	0					T Sq. Ft.:	0	
Largest Room:	0					Ceiling:	0	
Theater Capacity:	0					Banquet Capacity:	0	
Classroom Capacity:	0				R	eception Capacity:	0	
Sleeping Rooms:	0					Suites:	0	
Villas:	0					Exhibit Space?		
Exhibits:	0					Booths:	0	
Description:							4	
Space Notes:							6	
Upload Floorplan File:	Choose File	No file chosen						
Upload Large Floorplan File:	Choose File	No file chosen						
				Update	Cancel		_	Add New Room

Juris	sdiction Richmond	DTN Program
ings staura		MEETING ROOM: NEW MEETING ROOM Save Save & New Room Close Red fields are required. Meeting Room Information
ber o	Room Name:	Theater Capacity: 0
Large	Square Feet:	0 Classroom Capacity: 0
ater	Width:	Banquet Capacity: 0
oom (	Length:	Reception Capacity: 0
epin	Height:	Amphitheater: Yes  No
	Booth Capacity:	0 Listening Devices: Ves  No
De:		Red fields are required. Save Save & New Room Close

#### Social Media (needs new screen shot)

In this tab you can enter the appropriate links to your listings social media profiles; this includes Facebook, Instagram, Pinterest, Twitter and YouTube.

- 1. After clicking the "Social Media" tab you will see fields to enter links to your social media profiles.
- 2. Enter the appropriate links into the correct fields.
- 3. Be sure to click "Update" to make sure your social media links are updated on your listing.

Listings	Web	Amenities	Social Media	<b>Benefits Summary</b>	Contacts	
			1		-	Update
						Social Media for Partner
	Fac	ebook URL				
	Inst	agram URL				
	Pin	terest URL				
	1	witter URL				
	Yo	uTube URL:				
					_	Update

#### **Benefits Summary**

This tab enables you to view:

- In-kind/Expenses
- Leads
- Services
- Articles
- Web Site
- Coupon Hits
- Fams/Site Inspections

Listings	Web	Ame	enities	Social Media	Benefits	Summ	ary Cont	acts			
Inkind/	Expen	se	Inkind	Expense Rec	eived V	nds	Services	Web Site	e Coupon Hits	Fams/Site Inspec	tions
Filter:	Both	🔻	All T	ypes		-	All Group	s	▼ 07/01/2015	to 07/31/2015	

#### Inkind/Expenses

The Expenses section shows what Richmond Region Tourism has spent money on. The Inkind section shows donated services or goods to Richmond Region Tourism by your business since July 2014.

Listings Web Am	enities Social Media	enefits Summary Contacts					
Inkind/Expense	Inkind/Expense Receiv	ved Leads Services Webs	Site Coupon Hits	Fams/Site Inspections			
FilzBoth	All Types	All Groups	▼ 07/01/2015	to 07/31/2015	н	✓ Page 1 of	0   ► →   Φ
Inkir <mark>d</mark> ID I/E	Group	Entity	Туре	Date Amoun	t Service	Date Added 🔌	Added By

#### InKind/ Expense Received

The Inkind/Expense Received tab shows any donated services from Richmond Region Tourism, or expenses you have benefited from. For example, if Richmond Region Tourism took you to lunch at a restaurant. this would show here.

Listings	Web	Amenities	Socia	l Media	Benefi	ts Summa	ry Cont	acts					
Inkind/	Expens	e Inkin	d/Expe	nse Rec	eived	Leads (	Services	Web Site	Coupor	ı Hits	Fams/Site Inspe	ctions	
Filter:	Show A	JI 🔻										-	
Туре	Acco	unt	Date	Γ Aι	nount	Service		Service Desc	ription	Creat	ed By		Created

#### <u>Leads</u>

For a summary of Leads sent to you from Richmond Region Tourism, click the Leads Tab. This tab is used by hotels.

Note the Date Range filter to select the time period you would like to view statistics for, then click Refresh. Connect will search the figures and display them below by group.

#### **Services**

A summary of Service Requests and Partner Referrals sent to your business.

Note the Date Range filter to select a time period you would like to view statistics for, then click refresh. Below you can see a summary of Service Requests sent to you, and Partner Referrals you were included in from each group.

Listings	Web	Amenities	Social Media	Benefits Summary	Contacts		
Inkind/E	Expense	e Inkind/	Expense Receiv	red Leacs Servic	es Web Sit	e Coupon Hits	Fams/Site Inspections
Date Ra	nge:	01/01/2015	to: 12/3	31/2015 Refrest			

#### Web Site and Coupon Hits

This is a summary of web activity from VisitRichmondVa.com.

- 1. Click on Web Site, again note the Date filter, click refresh once you have entered your date range.
- 2. Once selected, you will see a summary of Listing Views and Click Thrus (which means links in your listing that the web user then clicked on).

Listings	Web	Amenities	Social Me	dia Benef	fits Summ	ary Conta	cts		
Inkind/	Expen	se Inkind	/Expense	Received	Leads	Services	Web Site	Coupon Hits	Fams/Site Inspections
Start Dat	t <b>e:</b> July	y 🔻	2015 🔻	End Date:	July	▼ 2015	Alefres	h	

#### Coupon Hits

Here you can see how many times visitors have viewed/ used your coupons.

1. Click on Coupon hits to see a summary of Coupon activity, again by date range.

Listings Web A	menities Social Med	lia Benefits Su	mmary Conta	cts			
Inkind/Expense	Inkind/Expense R	eceived Lea	ls Services	Web Site	Coupon Hits	Fams/Site Inspections	
Start Date: July	▼ 2015 ▼	End Date: July	▼ 2015	Refres	ih 🔥		
			Coupe	on Title			Hits

#### Fam/Site Inspections

This is a summary of Fams (or Familiarization tours) or Site Inspections you have participated in since January 2015. Click Fams/Site Inspections, again by date range.

Listings W	eb Amenities Social Media	Benefits Sum	mary Contacts								
Inkind/Expense Inkind/Expense Received Leads Services Web Site Coupon Hits Fams/Site Inspections											
Filter: 01/0	Filter: 01/01/2015 to 12/31/2015										
Role	Event Name	Event Status	Event Start/End Dates	# of Attendees	Inspection Lead	Lead Account	Event Type	Activities			
Activity Host	Goodwill Industries International Site Visit	Planning Phase	Mar 1-3, 2015	1	2018 Delegate Assembly	Goodwill Industries	Convention Sales: Site Inspections	Driving Tour of Richmond			

#### **Contacts**

Remember to update your contacts under the Contacts tab with any changes as they occur. This is how Richmond Region Tourism communicates with you and your staff.

- 1. Click on the pencil icon to edit a contact or click on Add New Contact to add a new contact.
- 2. Click Save when finished.

Note the Contact Type dropdown. This is how you will make a contact Primary (main contact), Secondary (Coordinator/Assistant) or Inactive (contact no longer is associated with your organization).

tings Web Amenities Social Media Bene	fits Summary Contacts		Y	
		_	Add New Con	itact
Iter:Any Type 🔻				Įφ
ction Contact ID Contact Name	Title	Email	Phone Type >	
10586 CONTACT EXAMPLE	CONTACT EXAMPLE	EXAMPLE@EMAIL.COM	(555) 555-1234	Prim
(Edit Contact)				
	CONTACT: NEW CONTACT	FOR RICHMOND REGION TOURI	SM	
	Save Save	& New Contact Cancel		
	Colore	ed fields are required.		
	Conta	act Information		
First/Last Name:		Account: R	ichmond Region Tourism	
Full Name:		Contact Type:	None V	
Department:		Title:		
Preferred Method:None V		Email:	✓ 5	Send
Assistant:		Ast. Phone:		
Children:		Birthdate:	Month ▼Day ▼	
Gender: O Male O Female		Spouse:		
9-1 (804) 782-2777 avt	Pho	ne/Fax Numbers	avt	
Primary: (304) 762-2777		Alternate:	CAL.	and
Home:		Fax: (	504) / 50°23// Ext. 8	inu
	Addro	ess Information		
Physical		Billing	Shipping	
Use: Account: Physical 🔻	Use: Account: E	illing ▼	Use: Account: Shipping 🔻	
Address: 401 North 3rd Street	Address: 401 North	3rd Street	Address: 401 North 3rd Street	
Line 2:	Line 2:		Line 2:	
Line 3:	Line 3:		Line 3:	
City: Richmond	City: Richmond		City: Richmond	
Province: VA	State/Province: VA		State/Province: VA	
tal Code: 23219	Zip/Postal Code: 23219		Zip/Postal Code: 23219	

#### Service Requests

Service leads are business opportunities sent to you from Richmond Region Tourism that do not involve any hotel rooms; these include catering requests, meeting space only requests, transportation requests, and others.

- Once you have logged into Richmond Region Tourism, click the Service Requests tab to view a summary of your service leads.
- To view Service Requests by status, use the Status filter.

Partner Bulletins	Leads	Member Record S	ervice Requests			
			ALL SERVICE REC	QUESTS - CURRENTL	Y 6 IN VIEW	
Filter: New Any Status	▼All Grou	ps <b>T</b>				
New Pending		Starts With:	A   B   C   D   E   F   G   H   I	J K L M N O P Q R : 	S   U V W X Y 2 0t	her   All
Reque: Closed/Won	quest ID	Service Request A	Contact	Start/End Date	Lead	Туре
Conv/Meeting Sales	8768	ACMA Virginia Chapter Case Management Conference	Darlene Hutson	10/20/2012 - 10/20/2012		
Conv/Meeting Sales	<u>8767</u>	<u>BBQ Safety &amp; Town Hall</u> <u>Meeting</u>	Alexandra Gort	03/21/2012 - 03/21/2012	BBQ SAFETY & TOWN HALL MEETING	
Conv/Meeting Sales	<u>8771</u>	Club Reunion	Jacqueline Montanez	04/22/2012 - 04/22/2012		
Conv/Meeting Sales	<u>8751</u>	New Years Eve Party	Antoinette Rogers	12/31/2011 - 01/01/2012		
Conv/Meeting Sales	<u>8770</u>	<u>SERVPRO Awards Meeting-</u> Nunan	Leigh Bentley	03/21/2013 - 03/23/2013		
Conv/Meeting Sales	<u>8763</u>	<u>Tickles and Giggles</u> <u>Children's Consignment Fall</u> <u>20</u>	Caroline Fuller	08/22/2012 - 08/26/2012		
		Starts With:	ABCDEFGHII	J   K   L   M   N   O   P   Q   R   9	5   T   U   V   W   X   Y   Z   Ot	her   All

- Once you have found a Service Request that you want to respond to, click the Service Request name to view and respond.
- The Service Request Detail will then be displayed that includes notes from the Sales/Service Manager from the client. Be sure to select "Show More" to view the full description notes of the lead.

Richmond Regio	on Connect	We	Icome, Sarah Hunter - Logged in to: R	ichmond Region Tourism 🔻
Partner Bulletins	Leads Member Record	Service Requests	Reports	
	SER	<b>VICE REQUEST DE</b>	ETAIL: NEW YEARS EVE	PARTY
		Requ	est Information	
Request ID:	8751			
Account:	New Years Eve Party		Request Type:	
Lead:	None		Request Status:	Request
Request Name:	New Years Eve Party		Attendees:	75
Date(s):	: 12/31/2011 - 01/01/2012		Budget:	
Time(s):	: 07:00 PM - 01:00 AM		Location:	
Deadline:	:		$\frown$	
Description/Notes:	: Ms. Rogers is looking for a v	enue to host a New Ye .	(Show More)	
Additional Documentation:	None			
Sales Manager:	: Julie Fleshman			
Services Manager:	Doretha Winckler CMP			
Assistant:	: Julie Fleshman			
		Conta	act Information	
Contact:	Antoinette Rogers		Address:	1306 Dance Street
Title:	Planner		City:	Richmond
Company:	New Years Eve Party		State:	VA
Phone:	(804) 353-2224		Zip:	23220
Fax:	:		Country:	UNITED STATES

• After reviewing the information, click "Add Your Response."

	Re	Responses	
Add/Edit	Start Date - End Date	Responded	
Add Your Response	12/31/2011 - 01/01/2012	No Response Entered	

• To indicate if you will be taking on this lead, select the "Yes" or "No" button at the top left of the screen.



• To add a proposal, catering menu or any other relevant documents, click "Add" under the File Attachments pane.

• A second window will open; click "Choose File" to browse your computer library for an attachment.



• Find your document, and then click "Open."



• You will be directed back to the Attach a Document window; click "Add File" to save the attachment.

🖹 Richmond Region Connect - Google Chrome	
extranet.richmond.simpleviewcrm.com/lookup/fileupload.cfi	
Attach a Document File: Choose File Finding Leads.docx Add File Close	

• Once your response is complete, be sure to click "Save" at the bottom of the page, otherwise all inputted information and attachments will be lost.

#### **Reports**

In this section you will view statistical research and reports about the Richmond Region and the tourism industry.

