



# SLO CAL Connection Checklist

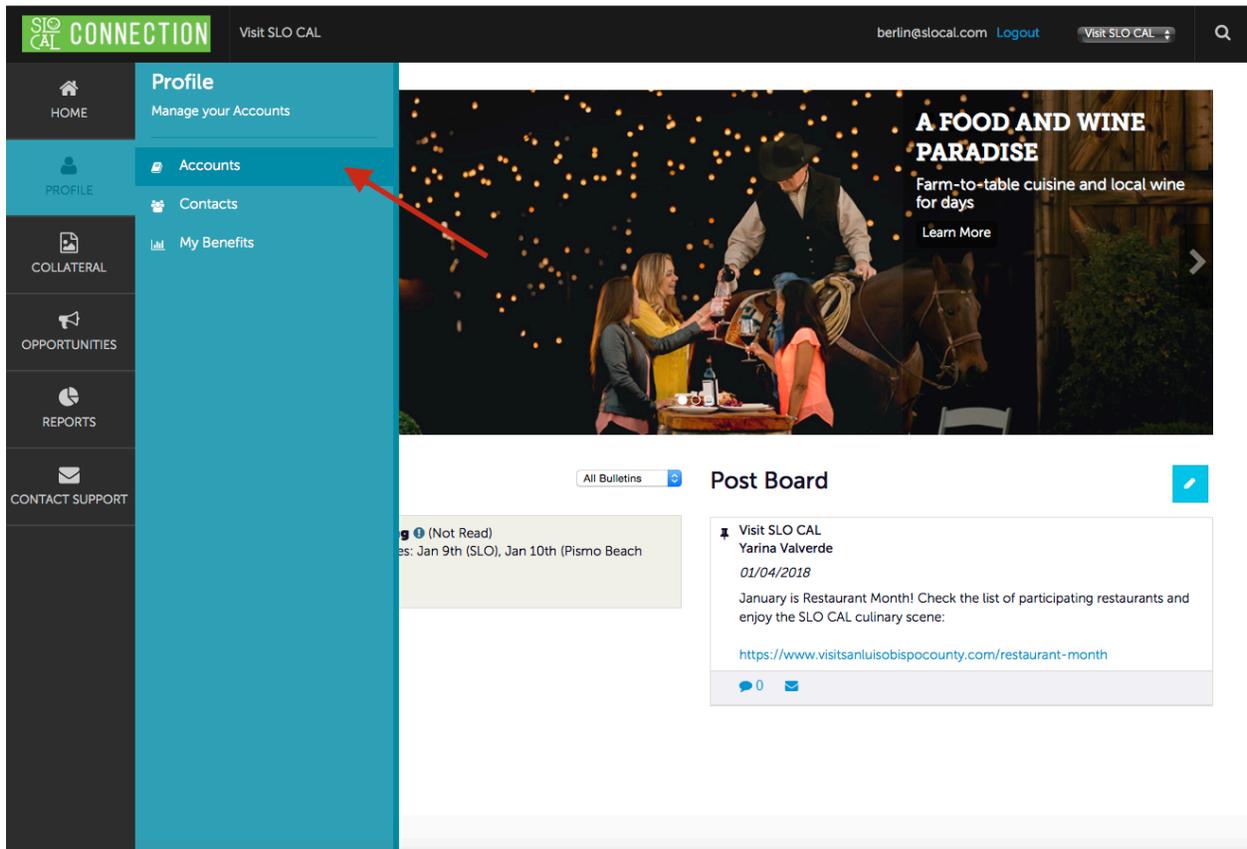
## Initial Login Checklist

Here are the first steps to setting up your account. A full training video is available here: <https://www.visitsanluisobispo.com/slocal-connection>

### Update your account information

Ensure your account and contact information is accurate and complete. Doing so will ensure the correct information is displayed on our website.

1. After logging in (<https://slocal.extranet.simpleviewcrm.com>), the home screen will appear with a left-hand sidebar. Hover your mouse to the side bar and click on “Profile.” Additional options will appear. Click on “Accounts.”



2. You will be taken to the “Accounts” page where your business name will be listed. Click on the account you would like to update.

**SLO CAL CONNECTION** Visit SLO CAL berlin@slocal.com Logout Visit SLO CAL

**Account Details**

**RETURN**

Sections:

- Account Information
- Phone Information
- Address Information
- Image Gallery

Related Details:

- Manage Amenities
- Manage Meeting Space

**Account Information**

Account ID	
Account	Visit SLO CAL
Extranet Parent	
Region	San Luis Obispo
Email	info@slocal.com
Website	www.visitsanluisobispo.com

**Phone Information**

Primary	(805) 541-8000
Alternate	
Toll Free	
Fax	

**Address Information**

Physical Address

Address 1	1334 Marsh St
City	San Luis Obispo
State/Province	CA
Zip/Postal Code	93401

### Updating your online listing

Under “Collateral”, find the “Listings” section, which will include all the current business listings under your account (tip: if you want to manage more than one listing, let the Visit SLO CAL team know so we can add you as a manager of additional listings).

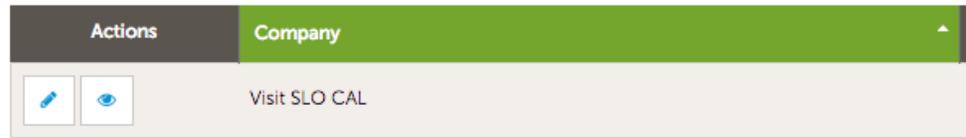
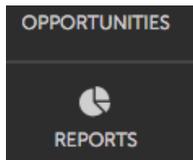
**SLO CAL CONNECTION** Visit SLO CAL

**Collateral**  
Manage your Collateral

- Listings
- Special Offers
- Calendar of Events
- Media

**ADVENTURE**  
Feed your inner-explorer in SLO CAL  
[Learn More](#)

Select the pencil icon to edit your listing information:



The first section will contain your business description. Make sure it's accurate and it follows our content guidelines.

## Update Listing

Here are our best practices to write an appropriate business description:

1. Please refrain of using the first person to write about your business, instead describe your business as an outside observer would, like a journalist or magazine editor. Example:

- “We are a boutique hotel located in Paso Robles established in 1989 “ **WRONG**
- “[BUSINESS NAME] is a boutique hotel located in Paso Robles established in 1989“ **GOOD**

2. Include your business name in the first sentence of your description.

3. The recommended minimum length is 150 words, but you can provide more information (up to 500 words) as long as it is original content and NOT a direct copy from your website or any other online listing.

4. Make sure the information is useful, relevant and precise, helping users have a better understanding of your business and the goods/services you offer.

## Upload images

Having an up to date image gallery is a great asset for your company. With SLO CAL Connect you may upload photos and decide which ones you want active on our site and leave the rest stored in your account.

1. Begin in the “Account Details” page (see steps above).
2. Scroll to the bottom of the page, and under the “Address Information” you will find “Image Gallery” (See Below). Click on “Browse” and begin uploading your images!

**RETURN**

Sections:

- [Account Information](#)
- [Phone Information](#)
- [Address Information](#)
- [Image Gallery](#)

Related Details:

- [Manage Amenities](#)
- [Manage Meeting Space](#)

**Image Gallery**

**Drag and Drop Files here**  
 or use the "Browse" button below to find a file to add

➔

**BROWSE**



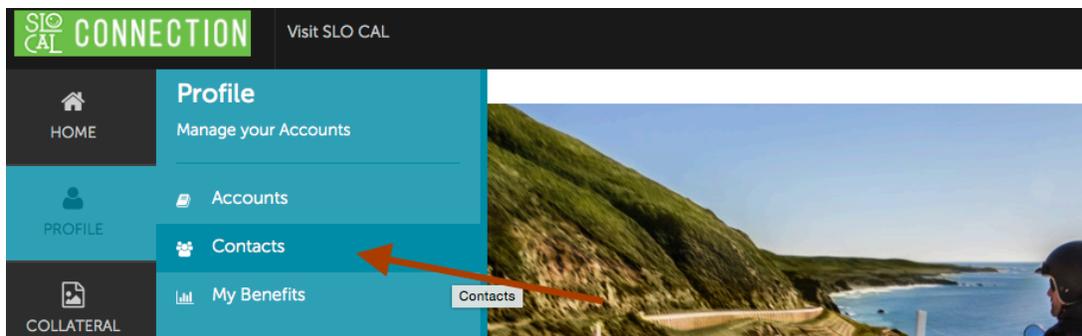





### Adding another user

If you are the primary user of the account, you have the ability to add more contacts. These contacts can then log into SLO CAL Connection and respond to opportunities, upload images, and view reports.

1. After logging in, the home screen will appear with a left-hand sidebar. Hover your mouse to the side bar and click on "Profile." Additional options will appear. Click on "Contacts."





2. The “Contacts” page allows you to view and manage all contacts. To add a new contact, click “Add Contact.”

**Contacts**

Filters (0) Manage Filters

Account is one of: CHOOSE - Contact Type is one of: CHOOSE -

APPLY FILTERS

**ADD CONTACT** Page 1 of 1 Go to Page: 1

Actions	Full Name	Account	Title	Email	Contact Type
	Berlin Lopez	Visit SLO CAL		berlin@slocal.com	Primary
	Chuck Davison	Visit SLO CAL	Chief Executive Officer	chuck@slocal.com	Primary
	Jordan Carson	Visit SLO CAL	Marketing Coordinator	jordan@slocal.com	Secondary
	Kimberly Headington	Visit SLO CAL	Executive assistant to the CEO	kimberly@slocal.com	Primary

3. Fill out the required fields under “Contact Information”. Make sure the email is correct, as this is where login details will be sent to your contact.

**New Contact**

SAVE CANCEL

Sections:  
Contact Information  
Address Information  
Phone Information  
Additional Information

**Contact Information**

Account: **Required** Visit SLO CAL

First Name: **Required**

Last Name: **Required**

Full Name: **Required**

Department:

Title:

Contact Type: **Required** --Choose One--

Preferred Contact Method: --Choose One--

4. Don't forget to click “Save” before exiting. Your new contact will then receive an email with instructions to create an account.