SLO CAL Connection Checklist
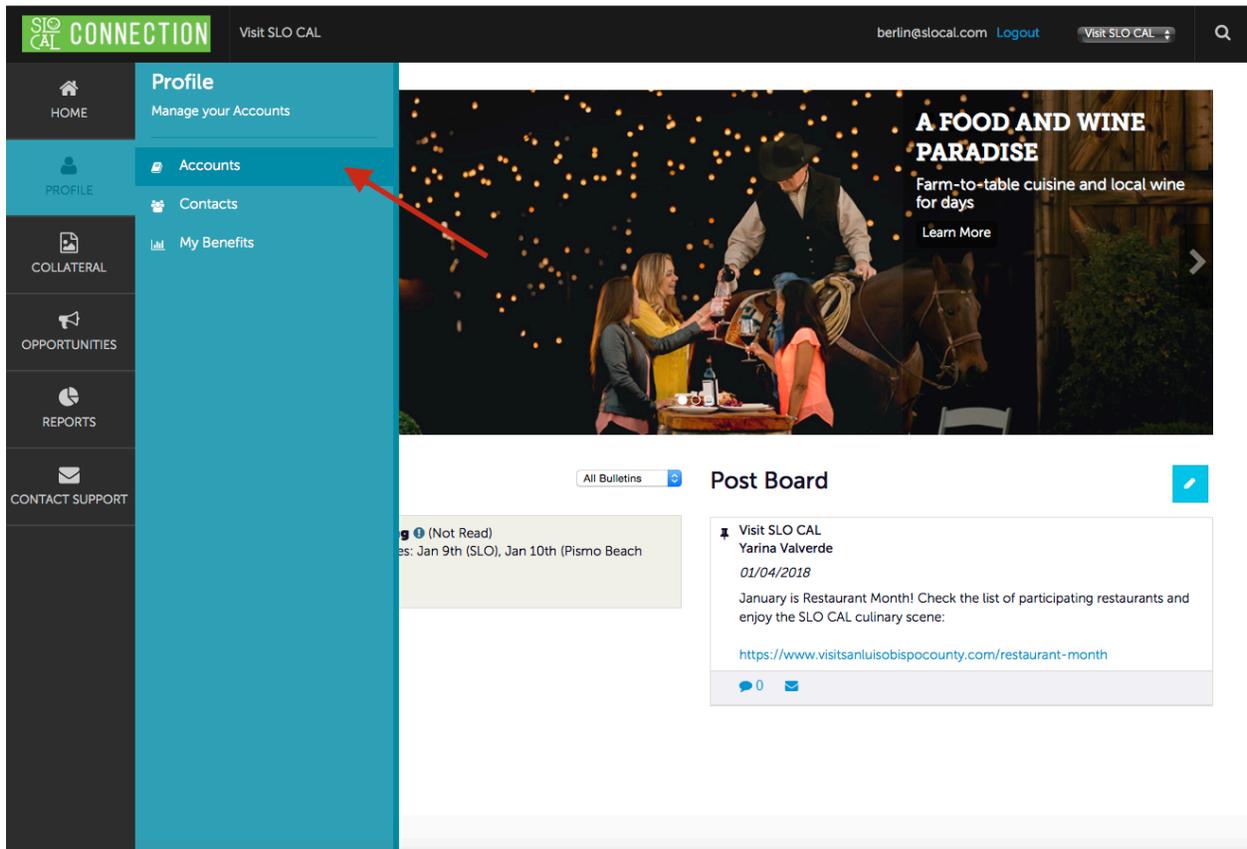
Initial Login Checklist

Here are the first steps to setting up your account. A full training video is available here: https://www.visitsanluisobispocounty.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.

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).
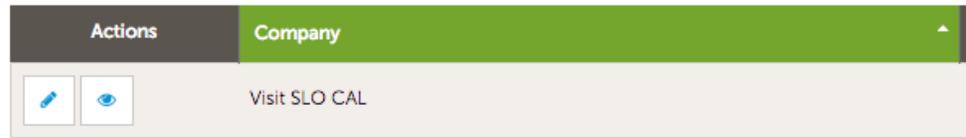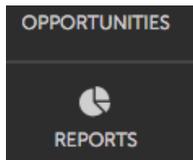

Select the pencil icon to edit your listing information:

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

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!
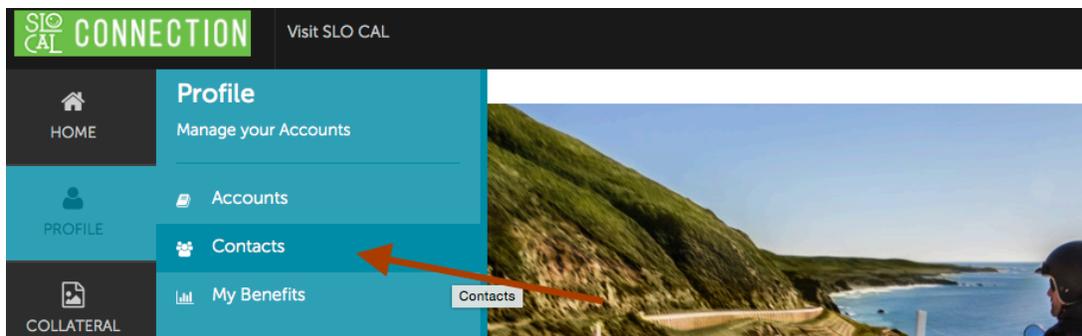
Adding another user

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."

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.

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