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.slocal.com/partners/membership/log-in/

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.

Update Business Amenities

1. Log in to your SLO CAL Connection Portal
2. Hover to vertical menu on the left-hand side
3. Click on Profile
4. Click on Accounts
5. Under Actions, click on the drop-down menu next to the eye icon.
6. Click on Manage Amenities
7. Scroll down the different categories and select your amenities for each section (the amenities categories will depend on your business category).
8. After you have selected all the amenities in all the yellow sections, click on the blue “Save” button.
1. Go to Collateral > Materials Requests

![Collateral Screen]

2. You will see a list of your previous requests. To add your first Visitor’s Magazine request, click on “ADD MATERIALS REQUEST”.

![Materials Requests Screen]

3. Add any Special Instructions for your delivery
4. Under “Order Address”, make sure the address is the one you want your magazines to be delivered

5. Under “Order Details” > Qty add the number of Visitor’s Magazines you want to order. The minimum order quantity for delivery is 50 units.

6. Go to the top of the screen and hit “Save”
How to opt-out of CRM emails

If you do not wish to receive media leads, RFPs or any other business opportunity from Visit SLO CAL, you can choose opt-out of all SLO CAL Connection emails by going to Profile>Contacts>Edit Contact and selecting “No” under “Send Email”.

[Image of the Visit SLO CAL Connection's Update Contact page with the Send Email option highlighted]