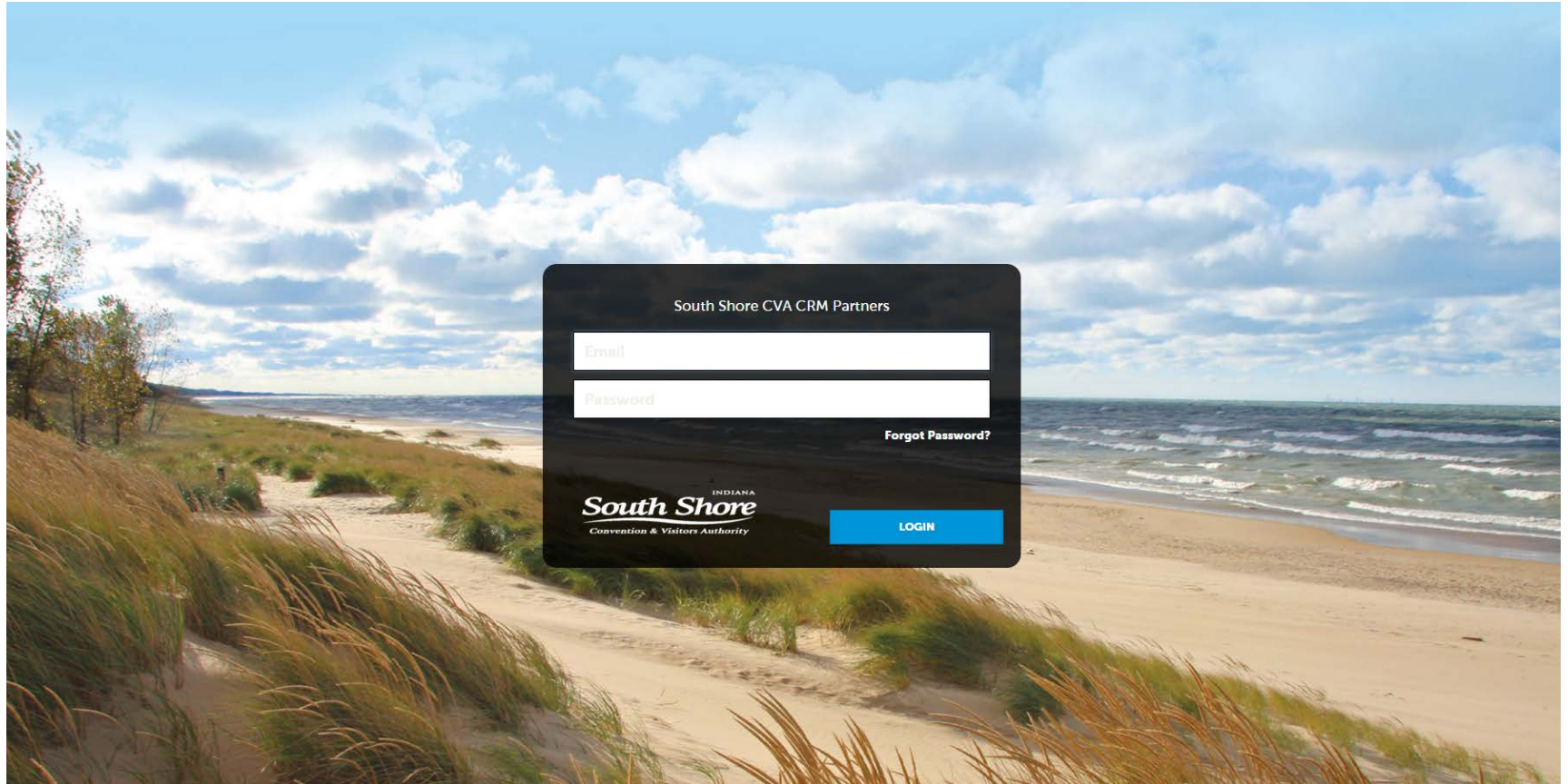


Partner Portal 4.0 User Instructions

Login Screen



Home Screen

The screenshot displays the Home Screen of a web application. At the top, a dark navigation bar contains the 'SOUTH SHORE' logo, the text 'South Shore CVA CRM Partners', the email 'cnowak@southshorecva.com', a 'Logout' link, and a dropdown menu for 'South Shore Convention and Visitors Authority'. A search icon is located on the far right. Below the navigation bar is a horizontal banner featuring a scenic image of a beach and dunes. Overlaid on the banner are two advertisements: one for 'PAY IT FORWARD' with a 'CLICK HERE' button, and another for 'architects' with contact information. A vertical sidebar on the left lists navigation options: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, ADMINISTRATION, and NEED HELP?. The main content area is divided into two columns. The left column, titled 'Partner Bulletins', includes a dropdown menu set to 'All Bulletins' and three news items: 'Partner News June 29, 2017', 'Tourism Week News May 12, 2017', and 'Tourism Week News May 11, 2017'. The right column, titled 'Post Board', shows two posts: one from 'Majestic Star Casino and Hotel' dated 02/02/2017, and another from 'South Shore Convention and Visitors Authority' dated 02/01/2016. Each post includes a title, author, date, and a brief description, with icons for comments and email.

At A Glance is a brief view of your listing and special offers tracking. You can also click the See All link to the right to view more information about your property interaction with the CVA.

Home Screen (cont'd)

South Shore CVA CRM Partners

South Shore Convention and Visitors Authority

South Shore Convention and Visitors Authority

Partner Bulletins

All Bulletins

Post Board

Partner News June 29, 2017 (Not Read)
NSA 'B & C' World Series coming in July, South Shore Regional Car Show, Indiana State Festivals Guide and 2018 Tourism Luncheon opportunities
[View Full](#)

Tourism Week News May 12, 2017 (Not Read)
Meet our newest staff member, Indiana State Festivals Guide, new 2017 partners and more.
[View Full](#)

Tourism Week News May 11, 2017 (Not Read)
Save the date for the R.O.S.E. Awards dinner, promotional opportunities, statewide hospitality awards and more.
[View Full](#)

Tourism Week News May 10, 2017 (Not Read)
Upcoming sporting events, the need for a convention center, South Shore paintings exhibit and more.

Majestic Star Casino and Hotel
Michelle Ramirez
02/02/2017
Majestic Star Casino and Hotel has some great specials going on for all tour and travel groups! Please contact Michelle Ramirez today in order to book your getaway! 219-323-5875.
0 0

South Shore Convention and Visitors Authority
Ms. Candace Nowak
02/01/2016
If you have any questions about the new partner portal 4.0 feel free to post them here or email Candace at cnowak@southshorecva.com.
0 0

Post Board allows you to communicate with other properties in your destination. By clicking on the caption bubble icon, you can reply to a post. You can also email the poster by clicking the mail icon.

Home Screen (cont'd)

SOUTH SHORE South Shore CVA CRM Partners cnowak@southshorecva.com Logout South Shore Convention and Vi

PAY IT FORWARD
Honor employees who make a difference every day!
[CLICK HERE](#)

Let us transform your great ideas into a reality!
architects
16125 LaSalle St., South Holland, Illinois
708-339-3900 • www.jmaarchitects.com

Partner Bulletins All Bulletins ▾

- Partner News June 29, 2017** (Not Read)
NSA 'B & C' World Series coming in July, South Shore Regional Car Show, Indiana State Festivals Guide and 2018 Tourism Luncheon opportunities.
[View Full](#)
- Tourism Week News May 12, 2017** (Not Read)
Meet our newest staff member, Indiana State Festivals Guide, new 2017 partners and more.
[View Full](#)
- Tourism Week News May 11, 2017** (Not Read)
Save the date for the R.O.S.E. Awards dinner, promotional opportunities, statewide hospitality awards and more.
[View Full](#)
- Tourism Week News May 10, 2017** (Not Read)
Upcoming sporting events, the need for a convention center, South Shore paintings exhibit and more.
[View Full](#)
- Tourism Week News May 9, 2017** (Not Read)

Post Board

- Majestic Star Casino and Hotel**
Michelle Ramirez
02/02/2017
Majestic Star Casino and Hotel has some great specials going on for all tour and travel groups! Please contact Michelle Ramirez today in order to book your getaway! 219-325-5875
- South Shore Convention and Visitors Authority**
Ms. Candace Nowak
02/01/2016
If you have any questions about the new partner portal 4.0 feel free to post them here or email Candace at cnowak@southshorecva.com.

Partner Bulletins are important notices, documentation, events, etc...

Home Screen (cont'd)

South Shore CVA CRM Partners

cnowak@southshorecva.com Logout

South Shore Convention and Visitors Authority

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION

NEED HELP?

PAY IT FORWARD
Honor employees who make a difference every day!
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Partner Bulletins

All Bulletins

Partner News June 29, 2017 (Not Read)
NSA 'B & C' World Series coming in July, South Shore Regional Car Show, Indiana State Festivals Guide and 2018 Tourism Luncheon opportunities.
[View Full](#)

Tourism Week News May 12, 2017 (Not Read)
Meet our newest staff member, Indiana State Festivals Guide, new 2017 partners and more.
[View Full](#)

Tourism Week News May 11, 2017 (Not Read)
Save the date for the R.O.S.E. Awards dinner, promotional opportunities, statewide hospitality awards and more.
[View Full](#)

Tourism Week News May 10, 2017 (Not Read)

Post Board

Majestic Star Casino and Hotel
Michelle Ramirez
02/02/2017
Majestic Star Casino and Hotel has some great specials going on for all tour and travel groups! Please contact Michelle Ramirez today in order to book your getaway! 219-323-5875.
[View Full](#)

South Shore Convention and Visitors Authority
Ms. Candace Nowak
02/01/2016
If you have any questions about the new partner portal 4.0 feel free to post them here or email Candace at cnowak@southshorecva.com.
[View Full](#)

By clicking the Member Profile icon, you can view/edit your property information, contacts associated with your property and view information about your property interaction with the CVA (same as the See All link in the At A Glance section). More on these options later in these instructions.

Home Screen (cont'd)

South Shore CVA CRM Partners

cnowak@southshorecva.com Logout South Shore Convention and Visitors Authority

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION

NEED HELP?

PAY IT FORWARD
Honor employees who make a difference every day!
[CLICK HERE](#)

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16125 LaSalle St., South Holland, Illinois
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Partner Bulletins All Bulletins

Partner News June 29, 2017 (Not Read)
NSA "B & C" World Series coming in July, South Shore Regional Car Show, Indiana State Festivals Guide and 2018 Tourism Luncheon opportunities
[View Full](#)

Tourism Week News May 12, 2017 (Not Read)
Meet our newest staff member, Indiana State Festivals Guide, new 2017 partners and more.
[View Full](#)

Tourism Week News May 11, 2017 (Not Read)
Save the date for the R.O.S.E. Awards dinner, promotional opportunities, statewide hospitality awards and more.
[View Full](#)

Tourism Week News May 10, 2017 (Not Read)
Honoring our great staff, the need for a new partner portal, South Shore partners

Post Board

Majestic Star Casino and Hotel
Michelle Ramirez
02/02/2017
Majestic Star Casino and Hotel has some great specials going on for all tour and travel groups! Please contact Michelle Ramirez today in order to book your getaway! 219-323-5875.

South Shore Convention and Visitors Authority
Ms. Candace Nowak
02/01/2016
If you have any questions about the new partner portal 4.0 feel free to post them here or email Candace at cnowak@southshorecva.com.

By clicking the Collateral icon, you can view/edit/add your listings/publication guides, special offers, calendar of events, media (i.e. images), occupancy data, and request materials from the CVA.

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)

South Shore CVA CRM Partners

cnowak@southshorecva.com Logout South Shore Convention and Visitors Au

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION

NEED HELP?

PAY IT FORWARD
Honor employees who make a difference every day!
[CLICK HERE](#)

Let us transform your great idea into a reality!
architect
16125 LaSalle St., South Holland, Illinois
708-339-3900 ■ [www.jmaarchitects.com](#)

Partner Bulletins All Bulletins ▾

Partner News June 29, 2017 (Not Read)
NSA 'B & C' World Series coming in July. South Shore Regional Car Show. Indiana State Festivals Guide and 2018 Tourism Luncheon opportunities
[View Full](#)

Tourism Week News May 12, 2017 (Not Read)
Meet our newest staff member, Indiana State Festivals Guide, new 2017 partners and more.
[View Full](#)

Tourism Week News May 11, 2017 (Not Read)
Save the date for the R O S E Awards dinner, promotional opportunities, statewide hospitality awards and more.
[View Full](#)

Tourism Week News May 10, 2017 (Not Read)
Upcoming sporting events, the need for a convention center, South Shore paintings

Post Board

Majestic Star Casino and Hotel
Michelle Ramirez
02/02/2017
Majestic Star Casino and Hotel has some great specials going on for all tour and travel groups! Please contact Michelle Ramirez today in order to book your getaway! 219-323-5875.
0 0

South Shore Convention and Visitors Authority
Ms. Candace Nowak
02/01/2016
If you have any questions about the new partner portal 4.0 feel free to post them here or email Candace at cnowak@southshorecva.com.
0 0

By clicking the Opportunities icon, you can view and respond to RFP's sent to you by the CVA. Opportunities are broken into RFP's (meeting and tour leads), Media Leads (travel writer RFP's) and Service Requests (non-room specific RFP's). More on these options later in the presentation.

Home Screen (cont'd)

South Shore CVA CRM Partners

cnowak@southshorecva.com Logout

South Shore Convention and Vis

PAY IT FORWARD
Honor employees who make a difference every day!
[CLICK HERE](#)

Let us transform your great idea into a reality!
architects
16125 LaSalle St., South Holland, Illinois
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HOME
PROFILE
COLLATERAL
OPPORTUNITIES
REPORTS
ADMINISTRATION
NEED HELP?

Partner Bulletins All Bulletins

Partner News June 29, 2017 (Not Read)
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[View Full](#)

Tourism Week News May 12, 2017 (Not Read)
Meet our newest staff member, Indiana State Festivals Guide, new 2017 partners and more.
[View Full](#)

Tourism Week News May 11, 2017 (Not Read)
Save the date for the R.O.S.E. Awards dinner, promotional opportunities, statewide hospitality awards and more.
[View Full](#)

Tourism Week News May 10, 2017 (Not Read)
Increasing tourism events: the need for a convention center. South Shore maintains

Post Board

Majestic Star Casino and Hotel
Michelle Ramirez
02/02/2017
Majestic Star Casino and Hotel has some great specials going on for all tour and travel groups! Please contact Michelle Ramirez today in order to book your getaway! 219-323-5875.
0 0

South Shore Convention and Visitors Authority
Ms. Candace Nowak
02/01/2016
If you have any questions about the new partner portal 4.0 feel free to post them here or email Candace at cnowak@southshorecva.com.
0 0

By clicking the Reports icon, you can view reports the CVA has posted for you. To view a report just click the name of the report.

Member Profile - Accounts

The screenshot displays the 'Accounts' section of the South Shore Convention & Visitors Authority Extranet. At the top, there is a blue header with the organization's logo, 'Extranet' label, 'South Shore CVA CRM Partners' text, user email 'cnowak@southshorecva.com', and a 'Logout' link. A search bar is also present. Below the header is a large banner image of a beach. The main content area is titled 'Accounts' and features a filter box with 'Filters (0)' and a 'Manage Filters' link. The filter box includes a dropdown menu for 'Status is one of:' with a 'CHOOSE' option and an 'APPLY FILTERS' button. A yellow arrow points from the 'APPLY FILTERS' button to the 'Actions' column of a table below. The table has two columns: 'Actions' and 'Account'. The 'Actions' column contains icons for edit (pencil), view (eyeball), and a dropdown arrow. The 'Account' column contains the text 'South Shore Convention & Visitors Authority'. The page also includes pagination controls showing 'Page 1 of 1' and 'Go to Page: 1'.

After you click the Member 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.

Member 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 of the left of the page. If you are viewing the account, the button in the top left will say Edit. If you are editing the account, the top left button will say Save. You must click the Save button before any of your changes are actually saved!

Member Profile - Contacts

The screenshot displays the 'Contacts' page in the South Shore CVA CRM Partners extranet. The page features a header with the South Shore logo, 'Extranet' label, 'South Shore CVA CRM Partners' text, user email 'crowak@southshorecva.com', a 'Logout' link, and a dropdown menu for 'South Shore Convention & Visitors Authority'. A large banner image of a beach is positioned below the header. The main content area is titled 'Contacts' and includes a filter box with 'Filters (0)', 'Account is one of:' and 'Contact Type is one of:' dropdowns, and an 'APPLY FILTERS' button. Below the filter box is an 'ADD CONTACT' button, highlighted with a yellow arrow. A table below the button lists contacts with columns for 'Actions', 'Full Name', 'Account', 'Title', 'Email', and 'Contact Type'. The table contains two entries for 'Indiana Welcome Center' associated with 'South Shore Convention & Visitors Authority', both with a 'Secondary' contact type. A yellow arrow points to the 'ADD CONTACT' button, and another yellow arrow points to the first row of the table.

Actions	Full Name	Account	Title	Email	Contact Type
  	Indiana Welcome Center	South Shore Convention & Visitors Authority			Secondary
  	Indiana Welcome Center	South Shore Convention & Visitors Authority			Secondary

After you click the Member 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 and Clone (i.e. duplicate) a contact depending upon your extranet permissions.

Member Profile - Contacts (cont'd)

South Shore
CONVENTION & VISITORS AUTHORITY

Extranet South Shore CVA CRM Partners cnowak@southshorecva.com Logout South Shore Convention & Visitors Authority

Update Contact

SAVE
CANCEL

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- General

Contact Information

Account: *Required
South Shore Convention & Visitors Authority

Last Name: *Required
[Redacted]

Department:

Contact Type: *Required
Secondary

First Name: *Required
[Redacted]

Full Name: *Required
Indiana Welcome Center

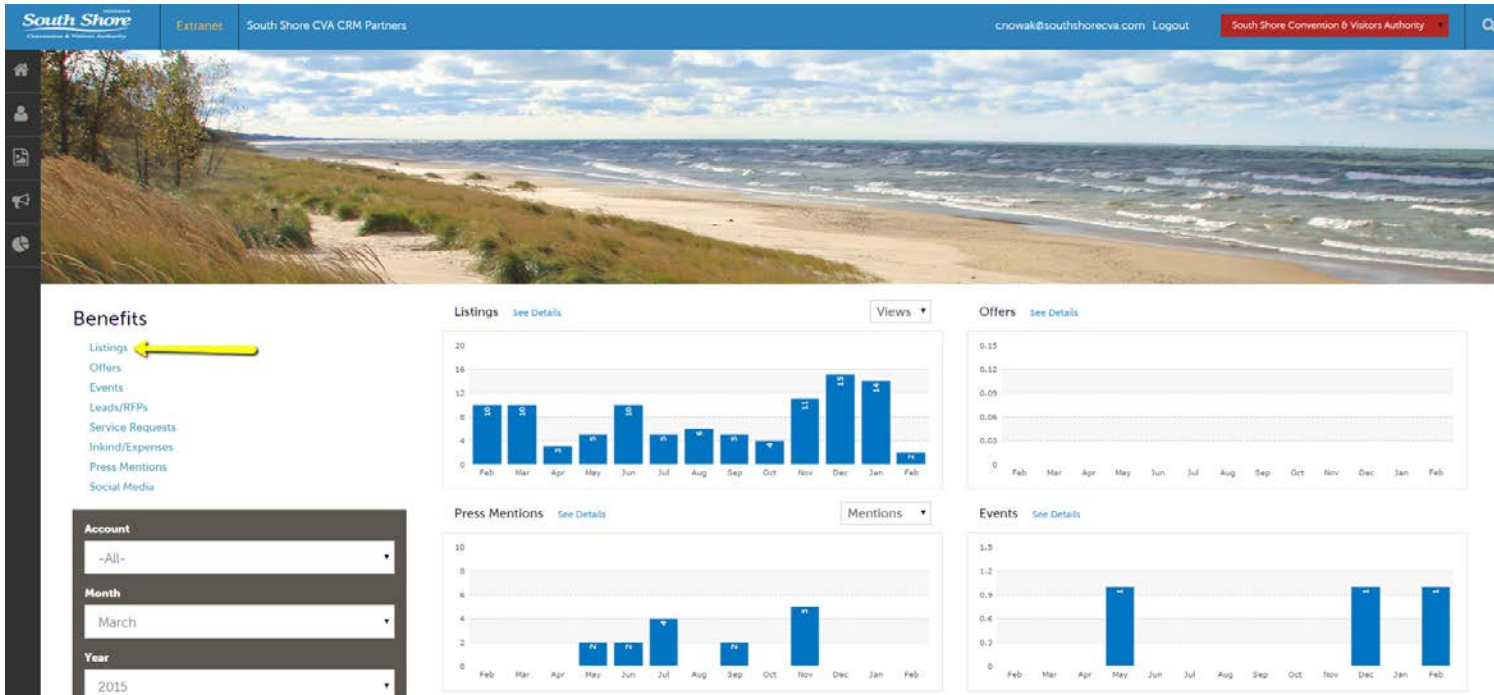
Title:

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 button in the top left will say Edit. If you are editing a contact, the top left button will say Save. You must click the Save button before any of your changes are actually saved!

IMPORTANT NOTE: If a contact has left your property it is your responsibility to notify the CVA and/or change their contact type to “Inactive”.



Member Profile - My Benefits



After you click the Profile icon and then My Benefits, you will be presented summary reports based off of the CVA's interaction with your property. The information you see on this page is specifically related to your property.

Collateral - Listings

The screenshot shows the 'Listings' page in the South Shore Convention & Visitors Authority Extranet. The page includes a navigation bar with the logo, 'Extranet', and user information. A sidebar on the left contains navigation icons. The main content area has a header image of a beach and a 'Listings' section with a 'Filters (0)' box and a 'Manage Filters' link. Below this is a table of listings with columns for Actions, Company, Listing Type, Category, SubCategory, and Listing ID. A yellow arrow points to the pencil icon in the Actions column of the first listing row.

Actions	Company	Listing Type	Category	SubCategory	Listing ID
 	South Shore Convention & Visitors Authority	Website	Visitor Resources/Services	Meeting and Convention Services	356

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 visitor 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
- General

Listing Information

Account: *Required
South Shore Convention & Visitors Authority

Type: *Required
Website

Contact:
Ms. Candace Nowak

Address Type:
Physical

Description:
Features 110 seats with flip-top desks, 12 x 7 flat screen, voice-activated microphones, laptop hookup, free high-speed internet and more.

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 button in the top left will say Edit. If you are editing a listing, the top left button will say Save. You must click the Save button before any of your changes are actually saved!

IMPORTANT NOTE: Any edits or adding of listings will require approval from the CVA. Upon saving your updates, the CVA will be notified of your changes/adds.

Collateral - Listings(cont'd)

Sections:

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

TOLL FREE

800-255-5253


Website Notifications

Email To Notify:

Notification Interval:

Listing Image

Select one or more images



South Shore
tion & Visitors Au

When you edit a listing, you can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu. As mentioned in the previous slide, any edits of listings will require approval from the CVA. Upon saving your updates, the CVA will be notified of your changes/adds. More on images in the Collateral – Media slide.

NOTE: Not all listing types allow for images to be added.


Collateral – Special Offers

South Shore
Commissioner's Office

Extranet South Shore CVA CRM Partners cnowal@southshorecva.com Logout South Shore Convention & Visitors Authority

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

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending
No Records Were Found						

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. You can also create a new offer by clicking the Add Offer button.

Collateral – Special Offers (cont'd)

New Offer

SAVE

CANCEL

Sections:

- Offer Information
- Offer Image
- Offer Dates
- Offer Categories
- Offer Listings

Offer Information

Account: *Required

South Shore Convention & Visitors Authority

Offer Title: *Required

Offer Link:

Offer Text:

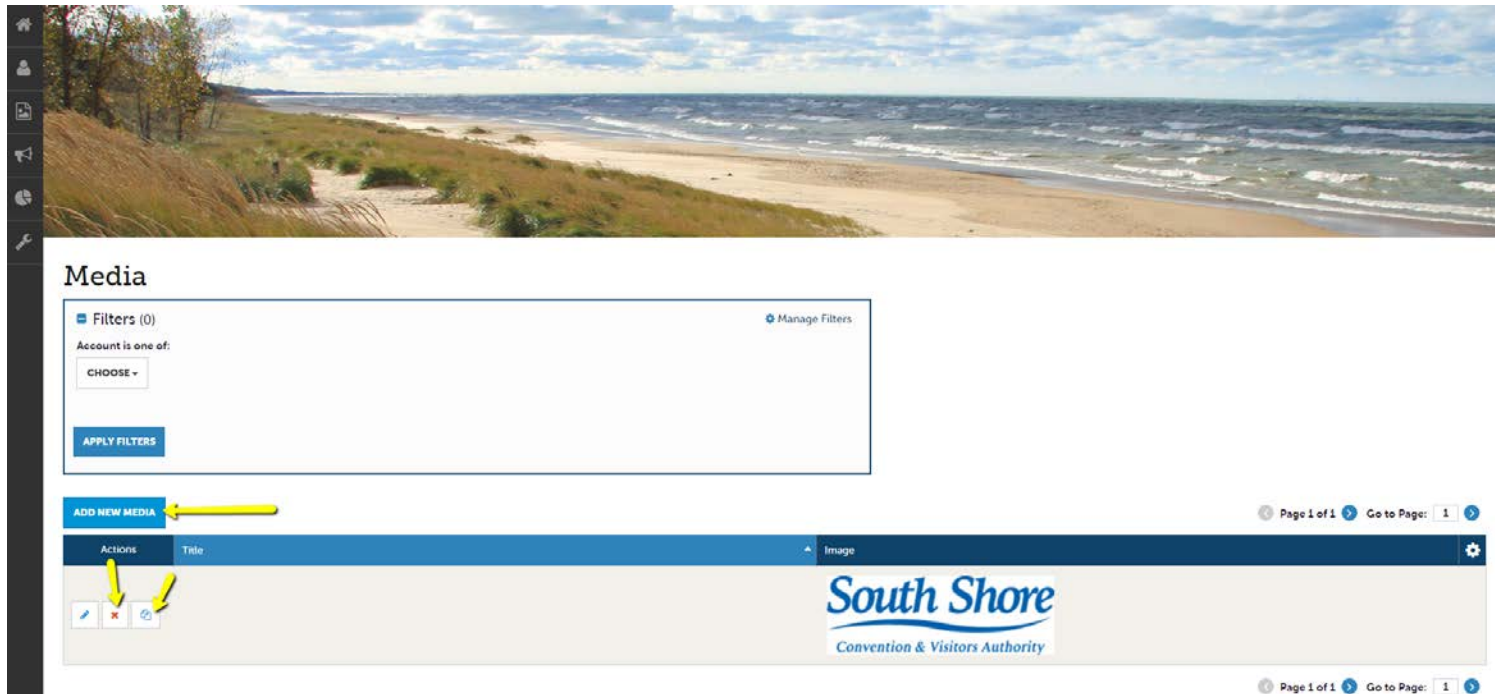
Offer Image

There are no images available to choose

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 button will say Save. You must click the Save button before any of your changes are actually saved! 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 the CVA. Upon saving your updates, the CVA will be notified of your changes/adds.

Collateral – Media



After you click the Collateral icon and then Media, you will be presented with your property's images to possibly be used in 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 clone an image by clicking the icon with two sheets of paper.

Collateral – Media (cont'd)

New Media

Media Information

Account: *Required
South Shore Convention & Visitors Authority

Title: *Required

Type: *Required
Image

Sort Order:

Description:

File:

Drag and Drop File To Page
or use the "Browse" button below to find a file to add.

BROWSE REMOVE

You can drag a file to the page to replace this file or use the "Browse" button

Listings: *Required
CHOOSE AMONG THE FOLLOWING... -

Listings is required

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 – Materials Request

The screenshot shows the 'Materials Requests' interface. At the top, there is a blue header with the 'South Shore' logo, 'Extranet' label, 'South Shore CVA CRM Partners' text, an email address 'cnowak@southshorecva.com', a 'Logout' link, and a 'South Shore Convention & Visitors Authority' dropdown menu. Below the header is a large banner image of a beach. The main content area is titled 'Materials Requests' and contains a filter section with a 'Filters (0)' label, a 'Status is:' dropdown menu, and an 'APPLY FILTERS' button. Below the filter section is a table with columns for Actions, Order ID, Send Date, Full Name, Company, City/State/Zip, and Items Ordered. A yellow arrow points to the 'ADD MATERIALS REQUEST' button. The table currently displays 'No Records Were Found'.

After you click the Collateral icon and then Materials Request, you will be presented with a list of orders you have submitted to the CVA. This feature will allow you to request collateral such as publication guides from the CVA. 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 (2 sheets of paper) icons.

Collateral – Materials Request (cont'd)

SAVE
CANCEL

Sections:
Materials Request
Information
Attached To
Order Recipient
Order Address
Order Detail

Company: *Required
South Shore Convention & Visitors Authority

Phone: 219-989-7770 Ext

Fax: 219-989-7777 Ext

Email: cnowak@southshorecva.com

Order Address

Address 1: *Required
7770 Corinne Drive

Address 2:

Address 3:

City: *Required
Hammond

State: *Required
Indiana

Zip: *Required
46323

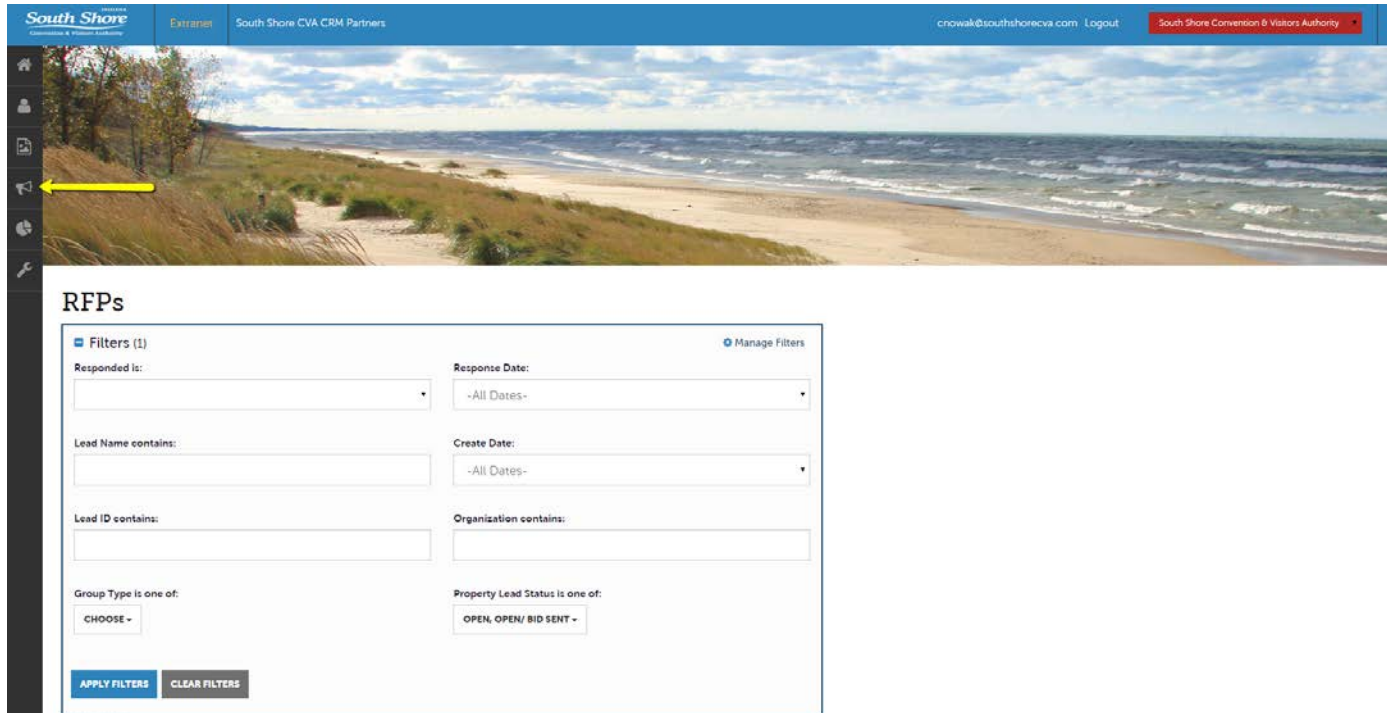
Country: *Required
UNITED STATES

Order Detail

Image	Product	Price	Qty	Available
	ROSE Awards Rack Cards	50.00	0	46000
	2015 - 2016 Visitor Guide	50.00	0	57751

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, the CVA will be notified of your request.

Opportunities – RFPs



The screenshot displays the South Shore CRM Extranet interface. The top navigation bar includes the South Shore logo, 'Extranet', 'South Shore CVA CRM Partners', the email 'cnowak@southshorecva.com', a 'Logout' link, and the 'South Shore Convention & Visitors Authority' name. A large banner image of a beach is visible. On the left sidebar, a yellow arrow points to the 'RFPs' icon. The main content area is titled 'RFPs' and contains a filter panel with the following fields:

- Filters (1) [Manage Filters]
- Responded to: [Dropdown menu]
- Response Date: [-All Dates-]
- Lead Name contains: [Text input field]
- Create Date: [-All Dates-]
- Lead ID contains: [Text input field]
- Organization contains: [Text input field]
- Group Type is one of: [CHOOSE -]
- Property Lead Status is one of: [OPEN, OPEN/ BID SENT -]

At the bottom of the filter panel are two buttons: 'APPLY FILTERS' and 'CLEAR FILTERS'.

After you click the RFP icon and then RFPs, you will be presented with your property's Sales and Tour Leads. Depending upon your filters, this will determine which leads you are presented. You can change your filters to narrow down your results 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 portal 4.0 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 yet 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 gone lost.
- 7. Closed Cancelled:** These are leads 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)

Page 1 of 1 Go to Page: 1

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 upon your chosen filters. 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 the lead, click on the Eyeball icon or the Lead Name.

Opportunities – RFPs (cont'd)



The screenshot displays a software interface for viewing a lead. On the left, there is a navigation menu with a 'RETURN' button at the top. Below it, the word 'Sections:' is followed by a list of menu items: '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 shows contact information: 'crm@simpleviewinc.com' and '123.123.1234'. Below this, there are several sections: 'Meeting Requirements' with a red arrow pointing to the text 'See attached RFP for more details.', 'Schedule of Events', 'Action Requested', 'Comments', 'Competitive Sites', 'Meeting Specs' with a red arrow pointing to the attachment '2016-Annual-Convention-RFP.docx', 'Lost Business Code', and 'Lost Comments'.

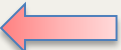
When viewing the lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the lead these can generally be found in one of two areas, Lead Information and/or Notes section. In the above graphic, this is the lead section; attachments will be found in the Meeting 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 editing your response, you will need to tell the CVA 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		

If you are pursuing the piece of business, you can enter the number of rooms (by room type) that you can commit to for this lead in the Room Information section of the response page.

Opportunities – RFPs (cont'd)

SAVE	Total	0	0	0	0	0
CANCEL	Requested	10	10	10	10	10

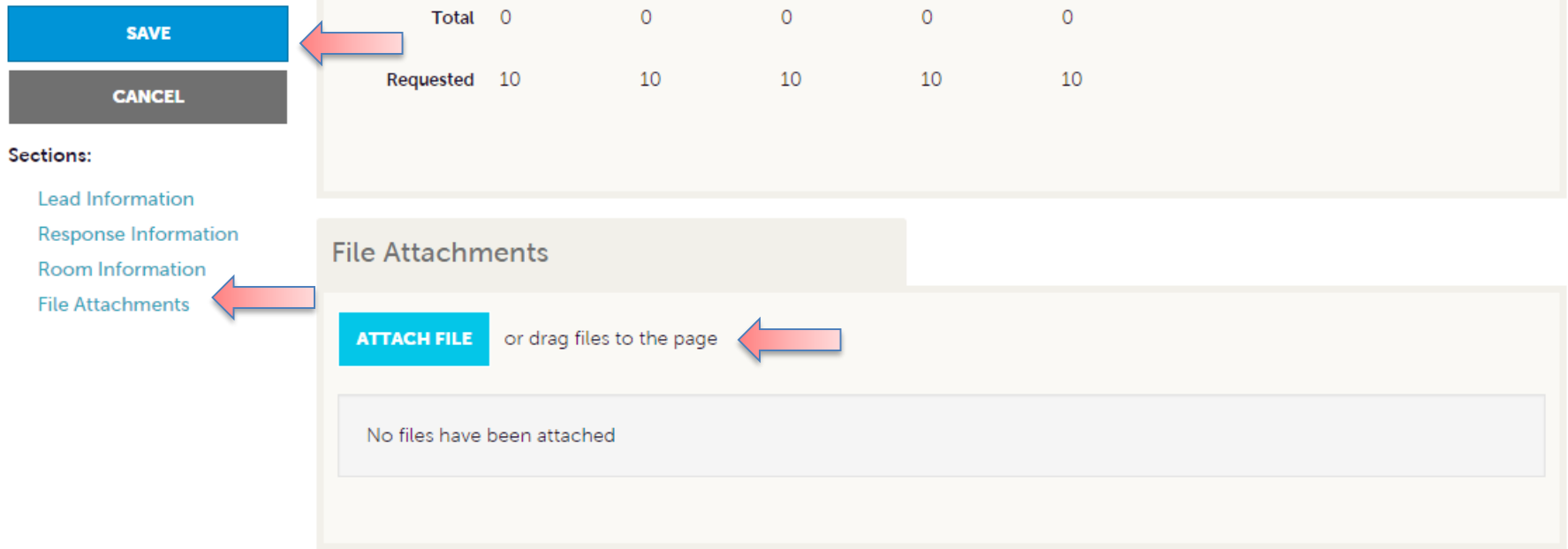
Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments

File Attachments

ATTACH FILE or drag files to the page

No files have been attached



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 your hard drive 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: 1

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 by the CVA'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 RFP – 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.

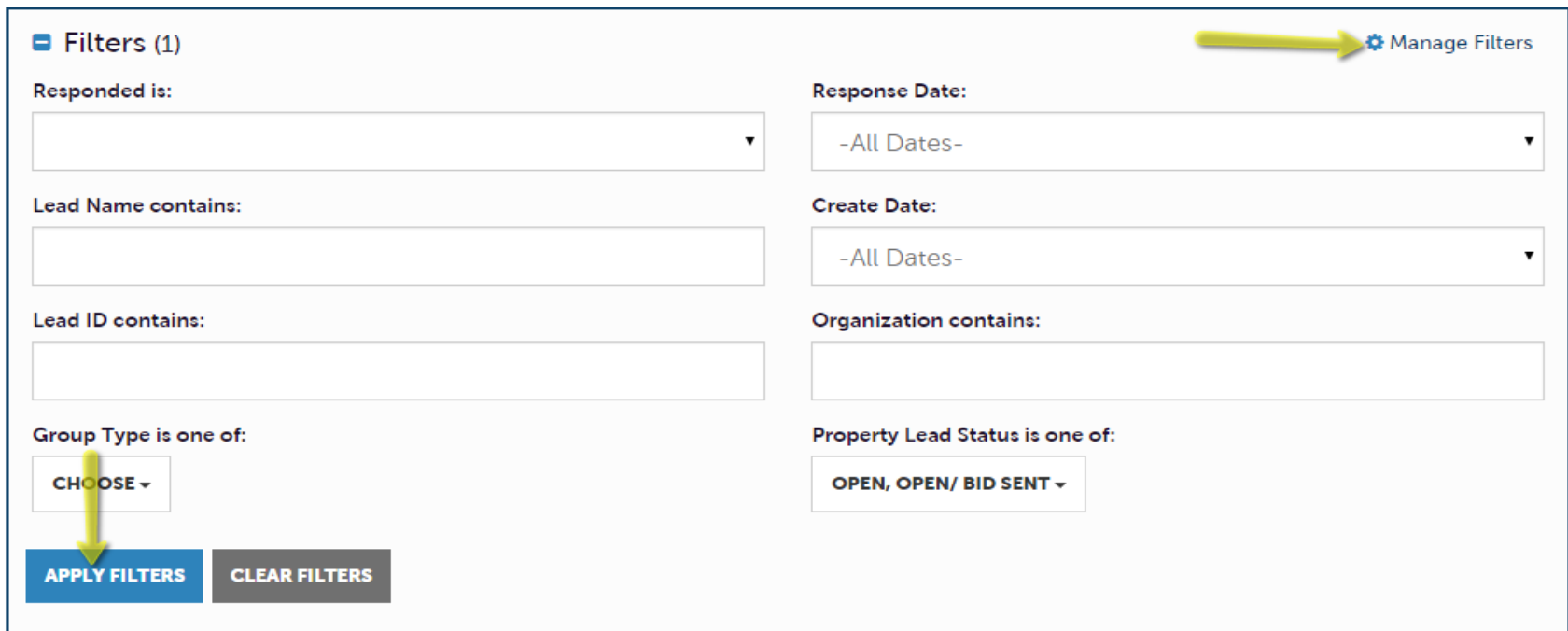
Filters (Cont'd)

Lets take a moment to discuss settings that can you customize for your own unique experience in the Partner Portal 4.0. Below is a list of a few things you have control to change for you, other colleagues may have different settings.

- 1. Filters** – On many pages of the extranet, you will see a Filters section. This is section allows you to narrow down the results you may see on the page. You can update your default filters by clicking the Manage Filters option in the top right corner of this section.
- 2. Data Grids** - When viewing pages with filter options, just below the filters is a data grid. A data grid displays a list of records matching the criteria you specified in the filters. You can update your default column heading in data grids by clicking the Sprocket icon in the top right corner of the data grid.
- 3. Update your Filters and Data Grids** – As just mentioned, you can customize your filters and data grids. When doing so you will have the ability to add or remove filters and column headings as well as choose the defaults values and ordering.

Filters (Cont'd)

RFPs



Filters (1) [Manage Filters](#)

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

Response Date:

Create Date:

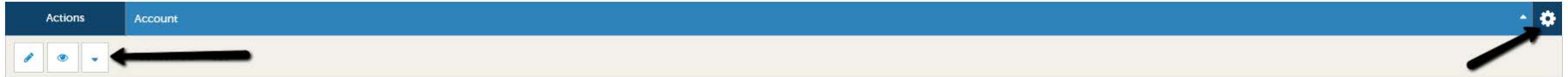
Organization contains:

Property Lead Status is one of:

APPLY FILTERS **CLEAR FILTERS**

Here is an example of the RFPs filter page. Once you have entered your filters click the Apply Filters button to see your results. To customize this page, click the Manage Filters option in the top right corner.

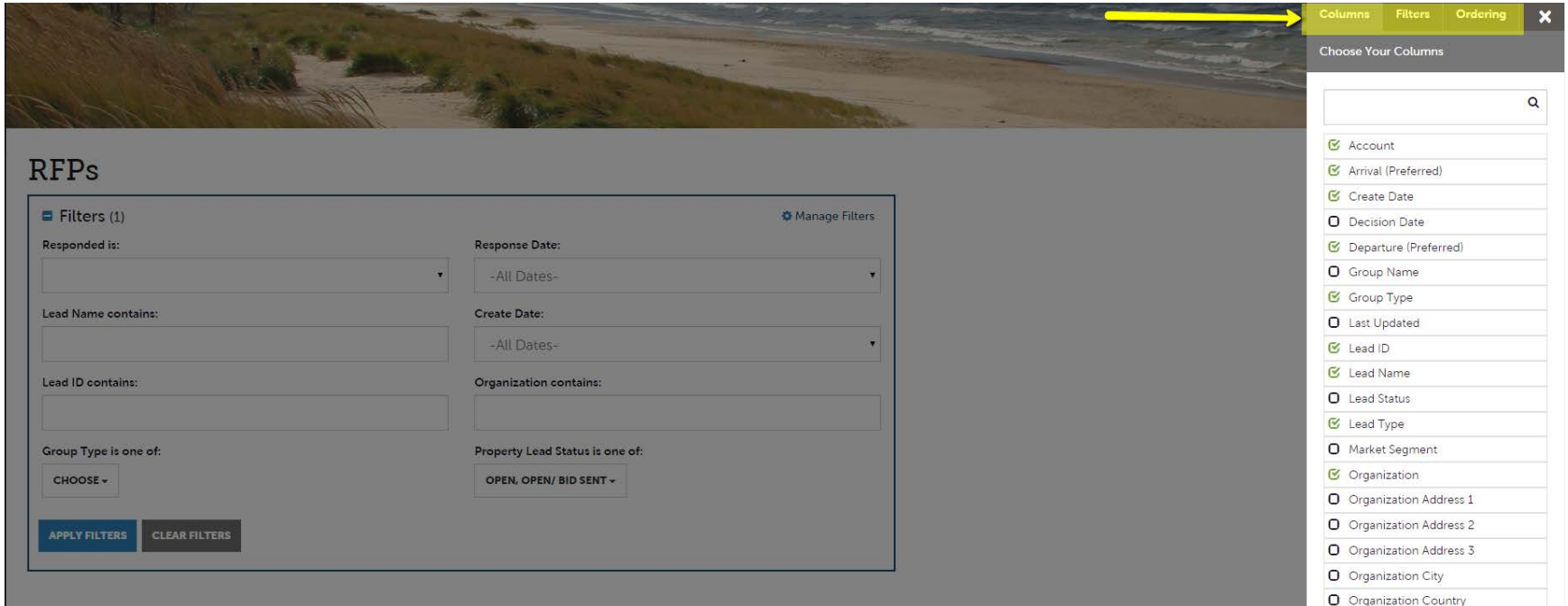
Filters (Cont'd)



Once have applied your filters, the data grid will update with the matching results. Within each data grid you may see several icons to the left of each record depending upon the page you are viewing. These icons are...

1. **Pencil** – this allows you to edit the record
 2. **Eyeball** – this allows you to view the record
 3. **Clone** – this allows you to duplicate the record
 4. **Add Button** - Depending on the page, you may see an Add button to the top left of the data grid. When this option is available, click the button to add a new record.
- Notice the Sprocket icon in the top right corner, this is to customize your data grids as explained on the next page.

Filters (Cont'd)



The screenshot displays a software interface for configuring filters and columns. The main content area is titled "RFPs" and contains a "Filters (1)" panel with a "Manage Filters" link. The filter panel includes several sections:

- Responded is:** A dropdown menu.
- Response Date:** A dropdown menu with "-All Dates-" selected.
- Lead Name contains:** A text input field.
- Create Date:** A dropdown menu with "-All Dates-" selected.
- Lead ID contains:** A text input field.
- Organization contains:** A text input field.
- Group Type is one of:** A dropdown menu with "CHOOSE" selected.
- Property Lead Status is one of:** A dropdown menu with "OPEN, OPEN/ BID SENT" selected.

At the bottom of the filter panel are "APPLY FILTERS" and "CLEAR FILTERS" buttons. To the right, a "Choose Your Columns" menu is open, showing a search bar and a list of columns with checkboxes:

- Account
- Arrival (Preferred)
- Create Date
- Decision Date
- Departure (Preferred)
- Group Name
- Group Type
- Last Updated
- Lead ID
- Lead Name
- Lead Status
- Lead Type
- Market Segment
- Organization
- Organization Address 1
- Organization Address 2
- Organization Address 3
- Organization City
- Organization Country

A yellow arrow points to the "Filters" tab in the top navigation bar, which also includes "Columns" and "Ordering" tabs.

As mentioned above, you can customize your filters and data grids as you prefer. When clicking on the mentioned settings options, you will be presented with a menu on the right. Here is where you can personalize your filters, data grid columns, and ordering. By changing these options, you are only changing them for yourself. A fellow colleague may have different settings.