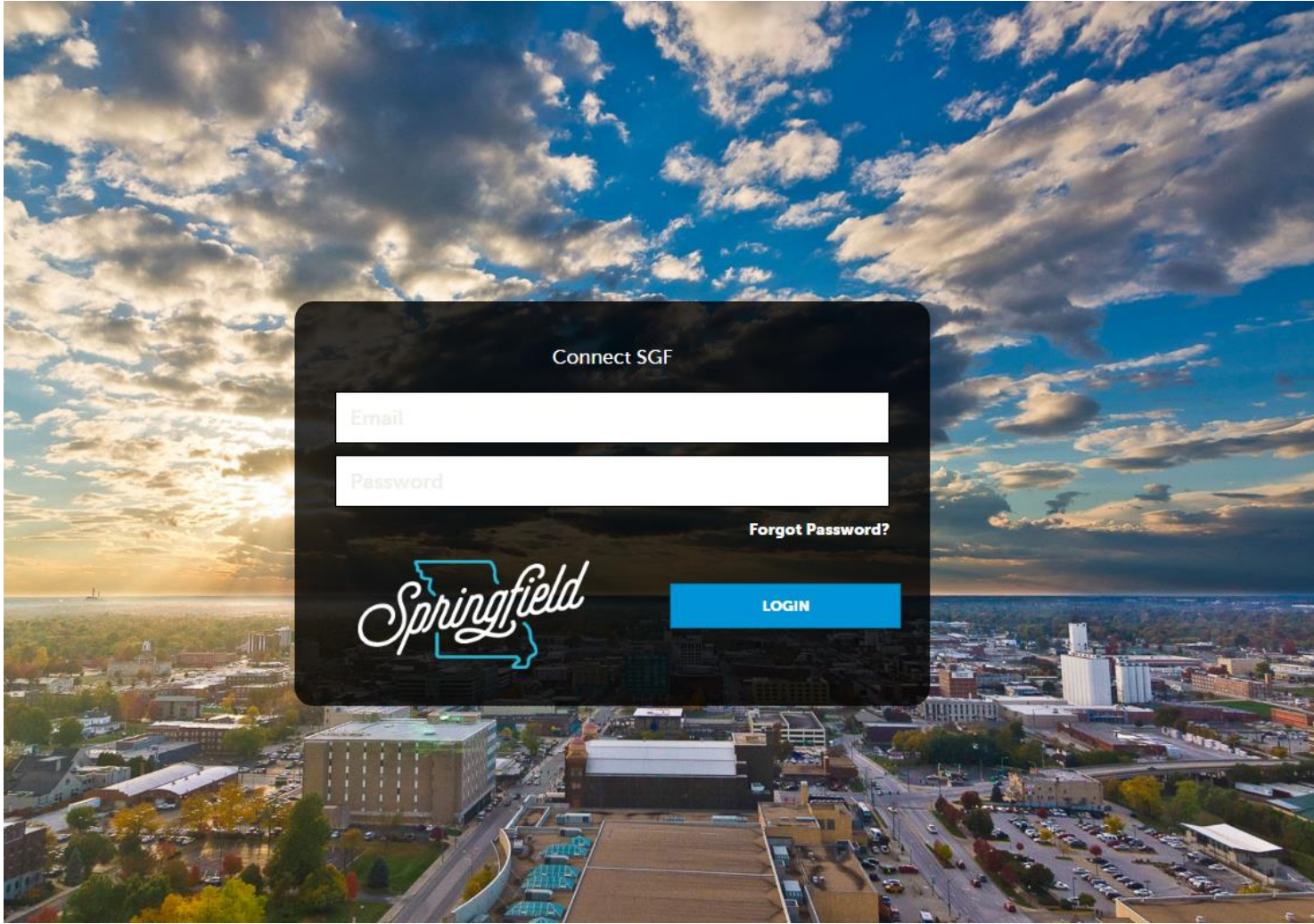




**Connect SGF User Instructions**

# springfield.extranet.simpleviewcrm.com



# Home Screen - Image Carousel

The screenshot shows the home screen of the Springfield Convention & Visitors Bureau website. At the top, there is a navigation bar with the Springfield logo, contact information (Connect SGF, mhandyside@springfieldoasis.com, Logout), and the location (Ramada Plaza Hotel & Oasis Convention Center). A search icon is also present.

On the left side, there is a dark sidebar menu with icons and labels for: HOME, PROFILE, COLLATERAL (highlighted with a red arrow), OPPORTUNITIES, REPORTS, and ADMINISTRATION.

The main content area features an image carousel. The current slide is a promotional graphic for the "2017 Salute to Travel & Tourism Awards Banquet". The graphic includes the Springfield Convention & Visitors Bureau logo, a pineapple, a palm tree, and the text "2017 Salute to Travel & Tourism Awards Banquet". To the right of the carousel is a text box for the "2017 Annual Banquet" with the following details: "Reserve your tickets to the 2017 Salute to Travel & Tourism Awards Banquet. February 16, 2017 at the Ramada Plaza Hotel - Paradise Ballroom." and an "RSVP Today!" button.

Below the carousel, there are two sections: "Partner Bulletins" and "Post Board".

**Partner Bulletins** (All Bulletins dropdown):

- 2017 Salute to Travel & Tourism Awards Banquet!** (Not Read) - Save the Date! - The Salute to Travel & Tourism is Feb. 16. [View Full](#)
- January 2017 Issues & Info Newsletter** (Not Read) - Dec. 23, 2016 - December was a busy month at the Convention & Visitors Bureau. [View Full](#)

**Post Board** (Springfield Convention & Visitors Bureau, Ms. Abby Terhark, 12/14/2016):

The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!

**Image Carousel** is a series of graphics highlighting important notices, upcoming events, featured partners, etc. that are posted by the CVB.

# Home Screen - Partner Bulletins

The screenshot shows the home screen of the Connect SGF website. At the top, there is a dark navigation bar with the Springfield logo on the left, the text 'Connect SGF' in the center, and user information 'jbednara@springfieldoasis.com Logout' and 'Ramada Plaza Hotel & Oasis Convention Center' on the right. Below the navigation bar is a vertical sidebar menu with icons and labels for 'HOME', 'PROFILE', 'COLLATERAL', 'OPPORTUNITIES', and 'ADMINISTRATION'. The main content area features a large banner with the text 'CONNECTSGF' in blue and white. To the right of the banner is a 'Connect SGF' section with a description and a 'Click Here to Learn More' button. Below the banner is a 'Partner Bulletins' section, which is highlighted by a red arrow. This section includes a dropdown menu set to 'All Bulletins' and a 'Post Board' button. The 'Partner Bulletins' section contains three items: '2017 Salute to Travel & Tourism Awards Banquet!' (marked as 'Not Read'), 'January 2017 Issues & Info Newsletter' (marked as 'Not Read'), and 'Tickets on Sale for Salute to Travel & Tourism Awards Banquet' (marked as 'Not Read'). The 'Post Board' section contains a post from the 'Springfield Convention & Visitors Bureau' by 'Ms. Abby Terhark' dated '12/14/2016', with a description about new 2017 Visitors Guides and a '0' comment count.

**Partner Bulletins** are important notices, documentation, events, etc. posted by the CVB. Important bulletins will be marked with a blue and white exclamation mark.



# Home Screen - Post Board

The screenshot shows the Springfield website interface. At the top, there is a navigation bar with the Springfield logo, 'Connect SGF', the email 'aterhark@springfieldmo.org', a 'Logout' link, and a dropdown menu for 'Springfield Convention & Visitors Bureau'. Below this is a dark sidebar with navigation options: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area features a 'CVB Blog' section with a night photo of the Gillioz theater and a text introduction. Below the blog is a 'Partner Bulletins' section with a red arrow pointing from 'All Bulletins' to 'Post Board'. The 'Post Board' contains two items: a bulletin about the '2017 Salute to Travel & Tourism Awards Banquet!' and a message from 'Springfield Convention & Visitors Bureau' dated 12/14/2016 regarding new 2017 Visitors Guides. Each item includes a 'View Full' link and a caption bubble icon.

**Post Board** allows a user to communicate with other properties within their destination. Clicking on the caption bubble icon allows a user to reply to a post. There is also an email icon for contacting the poster via email.



# Home Screen - Member Profile

The screenshot displays the Springfield Convention & Visitors Bureau website. The top navigation bar includes the Springfield logo, the text 'Connect SGF', the email 'aterhark@springfieldmo.org', a 'Logout' link, and a dropdown menu for 'Springfield Convention & Visitors Bureau'. A search icon is located in the top right corner. The left sidebar contains a navigation menu with the following items: 'HOME', 'PROFILE' (highlighted with a red arrow), 'COLLATERAL', 'OPPORTUNITIES', 'REPORTS', and 'ADMINISTRATION'. The 'PROFILE' section is expanded, showing 'Manage your Accounts' and a list of options: 'Accounts', 'Contacts', 'My Benefits', and 'Invoices'. The main content area features a large image of a baseball game at night. A 'Did You Know?' callout box is overlaid on the image, stating: 'The Springfield Cardinals are the AA affiliate of the St. Louis Cardinals. 2017 marks the 10th year for the Springfield Cardinals. Click Here to Learn More'. Below the image is a 'Post Board' section with a dropdown menu set to 'All Bulletins'. A bulletin is displayed, titled 'wards Banquet!' (Not Read) and dated 'Feb. 16'. The bulletin text is partially obscured but mentions 'Convention & Visitors Bureau' and 'Travel & Tourism awards banquet'. A 'Post Board' button with a pencil icon is visible in the top right of the post board area.

Clicking the **Member Profile** icon displays a property's information, such as contacts, account details and information about interaction with the CVB, in addition to invoices sent by the CVB.

Note: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.



# Home Screen - Collateral

Springfield

Connect SGF

aterhark@springfieldmo.org Logout Springfield Convention & Visitors Bureau

Collateral

Manage your Collateral

- Listings
- Special Offers
- Calendar of Events
- Media

DISCOVERSGF

Discover SGF

Discover SGF is a FREE online, video-based learning program designed for frontline staff at area hotels, attractions, restaurants and retailers. Participants enjoy free or discounted admission to local attractions and can earn their Springfield Hospitality Professional certification upon completion of the courses.

Click Here to Learn More

All Bulletins

Post Board

wards Banquet! (Not Read)

l & Tourism is Feb. 16

etter (Not Read)

sy month at the Convention & Visitors

Springfield Convention & Visitors Bureau

Ms. Abby Terhark

12/14/2016

The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!

Clicking the **Collateral** icon displays options for:

- Listings (website and Visitors Guide),
- Special Offers,
- Calendar of Events and
- Media (i.e. photos, logo and videos)

Note: Some of these options are just view and/or edit and/or add.



# Home Screen - Opportunities

Springfield

Connect SGF

mhandyside@springfieldoasis.com Logout

Ramada Plaza Hotel & Oasis Convention Center

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION

## Opportunities

Manage your Opportunities

- RFPs
- Media Leads
- Service Requests

### Did You Know?

Fought on August 10, 1861, the Battle of Wilson's Creek was a pivotal battle in Missouri and the second major battle of the Civil War. Wilson's Creek National Battlefield, one of six national parks in the state of Missouri is a perfect stop for an entertaining and educational experience.

[Click Here to Learn More](#)

All Bulletins

### Post Board

- wards Banquet!** (Not Read)  
l & Tourism is Feb. 16
- etter** (Not Read)  
sy month at the Convention & Visitors
- Springfield Convention & Visitors Bureau**  
Ms. Abby Terhark  
12/14/2016  
The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!

Clicking the **Opportunities** icon displays opportunities sent by the CVB.

- RFPs (Meeting and Tour Leads),
- Media Leads
- Service Requests (non-room specific RFPs)

*Media Leads and Service Requests are not currently used.*





# Home Screen - Reports

The screenshot shows the Springfield Convention & Visitors Bureau Home Screen. The top navigation bar includes the Springfield logo, 'Connect SGF', the user email 'aterhark@springfieldmo.org' with a 'Logout' link, and a dropdown menu for 'Springfield Convention & Visitors Bureau'. A search icon is also present. The left sidebar contains navigation icons for HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area is titled 'Reports' and features a 'Leads' section with two reports: 'Citywide Convention Calendar' (described as a clone of the 'Definite Convention Calendar' for events with 1000+ room nights) and 'Definite Convention Calendar' (a list of definite leads filtered by date range). A red arrow points to the 'REPORTS' icon in the sidebar.

Clicking the **Reports** icon displays reports the CVB has posted. Current reports include:

- Citywide Convention Calendar
- Definite Convention Calendar

To view a report just click the name of the report.



# Profile - Accounts

Springfield

Connect SGF

aterhark@springfieldmo.org Logout

Springfield Convention & Visitors Bureau

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION

**Profile**  
Manage your Accounts

- Accounts
- Contacts
- My Benefits
- Invoices

**Did You Know?**  
The Springfield Cardinals are the AA affiliate of the St. Louis Cardinals. 2017 marks the 10th year for the Springfield Cardinals.  
[Click Here to Learn More](#)

All Bulletins

**wards Banquet!** (Not Read)  
... & Tourism is Feb. 16

**etter** (Not Read)  
... month at the Convention & Visitors  
... Travel & Tourism awards banquet,  
... g with media and legislators and more.  
... e of Issues & Info.

**Post Board**

- Springfield Convention & Visitors Bureau  
Ms. Abby Terhark  
12/14/2016  
The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!

# Profile - Accounts

After you click the **Profile** icon and then **Accounts**, you will be presented with your account name and various actions you can perform.

If you see multiple account names, this is due to your property being associated with another property (*see example with Ramada and Fire & Ice Restaurant*).

- The **pencil** icon allows you to edit your property information.
- The **eyeball** icon allows you to view your property information
- The **down arrow** icon allows you to view and edit your amenity and meeting space information.

# Profile - Accounts

The screenshot shows a web form for editing account information. On the left, there are two buttons: a blue 'SAVE' button with a red arrow pointing to it, and a grey 'CANCEL' button. Below these is a 'Sections:' list with links: 'Account Information' (highlighted with a red arrow), 'Phone Information', 'Address Information', 'Social Media', 'Account UDF Group', and 'General'. The main form area contains the following fields:

- Account:** Text input field containing 'Simpleview Hotel and Conference Center'.
- Region:** Dropdown menu with 'North' selected and a red asterisk indicating it is required.
- Website:** Text input field containing 'www.simpleviewinc.com'.
- Phone Information:** A section header for the phone fields below.
- Primary:** Text input field with a grey 'Ext' button to its right.
- Alternate:** Text input field with a grey 'Ext' button to its right.

When you view or edit your property information, you can quickly scroll to a section on the page by clicking the links on the left of the page.

If you are viewing the account, the top left will display an **Edit** button. If you are editing the account, the top left will display a **Save** button.

**You must click the SAVE button before changes are applied!**

# Profile - Contacts

The screenshot displays the Springfield Convention & Visitors Bureau website. The top navigation bar includes the Springfield logo, the text "Connect SGF", the email "aterhark@springfieldmo.org", a "Logout" link, a dropdown menu for "Springfield Convention & Visitors Bureau", and a search icon. The left sidebar contains a vertical menu with categories: HOME, PROFILE (highlighted with a red arrow), COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The PROFILE section is expanded to show sub-items: Accounts, Contacts (highlighted with a red arrow), My Benefits, and Invoices. The main content area features a large image of a baseball game at night. A "Did You Know?" overlay on the image states: "The Springfield Cardinals are the AA affiliate of the St. Louis Cardinals. 2017 marks the 10th year for the Springfield Cardinals." Below the image is a "Click Here to Learn More" button. Underneath the image is a "Post Board" section with a dropdown menu set to "All Bulletins". The board contains two items: a "wards Banquet! (Not Read)" item dated Feb. 16, and a "Springfield Convention & Visitors Bureau" item by Ms. Abby Terhark dated 12/14/2016. The second item includes the text: "The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!" and shows 0 comments and 1 email icon.

# Profile - Contacts

Connect SGF    mhandyside@springfieldoasis.com    Logout    Ramada Plaza Hotel & Oasis Convention Center

## Contacts

Filters (0)    Manage Filters

Account is one of:     Contact Type is one of:

Page 1 of 2    Go to Page:

Actions	Full Name	Account	Title	Email	Contact Type
<input type="checkbox"/>	<a href="#">Ms. Allison Gregory</a>	<a href="#">Ramada Plaza Hotel &amp; Oasis Convention Center</a>	Sales Manager	<a href="mailto:ajgregory@springfieldoasis.com">ajgregory@springfieldoasis.com</a>	Secondary
<input type="checkbox"/>	<a href="#">Ms. Ashley Roper</a>	<a href="#">Ramada Plaza Hotel &amp; Oasis Convention Center</a>	Sales Manager	<a href="mailto:aroper@springfieldoasis.com">aroper@springfieldoasis.com</a>	Secondary

After you click the **Profile** icon and then **Contacts**, you will be presented with a list of all the contacts associated with your property.

**You do not have the ability to add or edit contacts.**

If you need to add contacts, or update information, contact the CVB to make the changes.



# Profile - Contacts



Connect SGF

aterhark@springfieldmo.org [Logout](#)

Springfield Convention & Visitors Bureau



HOME



PROFILE



COLLATERAL



OPPORTUNITIES



REPORTS



ADMINISTRATION

## Contact Details

RETURN

Sections:

[Contact Information](#)

[Address Information](#)

[Phone Information](#)

[Additional Information](#)

[General](#)

### Contact Information

Account	<a href="#">Springfield Convention &amp; Visitors Bureau</a>
First Name	Abby
Last Name	Terhark
Full Name	Ms. Abby Terhark
Department	Marketing
Title	Advertising Sales Assistant
Type	Secondary
Email	<a href="mailto:aterhark@springfieldmo.org">aterhark@springfieldmo.org</a>

### Address Information

Physical Address

When you click to **view** a contact, you can quickly scroll to a section on the page by clicking the links on the left of the page.

**IMPORTANT NOTE: If any contact changes need to be made, it is your responsibility to notify the CVB.**



# Profile - My Benefits

The screenshot shows the Springfield website interface. At the top, the Springfield logo is on the left, and the user email 'aterhark@springfieldmo.org' and 'Logout' are on the right. A dropdown menu shows 'Springfield Convention & Visitors Bureau'. A search icon is in the top right corner.

The left sidebar contains navigation options: HOME, PROFILE (highlighted with a red arrow), COLLATERAL, OPPORTUNITIES, REPORTS, and ADMINISTRATION. The PROFILE section is expanded, showing sub-options: Profile (Manage your Accounts), Accounts, Contacts, My Benefits (highlighted with a red arrow), and Invoices.

The main content area features a large image of a baseball game at night. A 'Did You Know?' overlay text reads: 'The Springfield Cardinals are the AA affiliate of the St. Louis Cardinals. 2017 marks the 10th year for the Springfield Cardinals. Click Here to Learn More'. Below the image is a 'Post Board' section with a dropdown menu set to 'All Bulletins'. A post from 'Springfield Convention & Visitors Bureau' by 'Ms. Abby Terhark' dated '12/14/2016' is visible, with the text: 'The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!'. There are 0 comments and 1 email icon below the post.



# Profile - My Benefits - Overview

Connect SGF aterhark@springfieldmo.org [Logout](#) Springfield Convention & Visitors Bureau

## Benefits

- Overview
- Events
- Leads/RFPs
- Inkind/Expenses
- Press Mentions

[PRINT](#)

**Account**  
-All-  
**Month**  
January  
**Year**  
2016  
TO  
**Month**

### Press Mentions

See Details Mentions

Month	Count
Jan	2
Feb	6
Mar	0
Apr	58
May	10
Jun	0
Jul	11
Aug	12
Sep	62
Oct	9
Nov	12
Dec	0

### Events

See Details

Month	Count
Jan	1
Feb	0
Mar	0
Apr	0
May	0
Jun	0
Jul	0
Aug	0
Sep	0
Oct	0
Nov	0
Dec	0

### Leads/RFPs

See Details Sent

Month	Count
Jan	0
Feb	0
Mar	0
Apr	0
May	0
Jun	0
Jul	0
Aug	0
Sep	0
Oct	0
Nov	0
Dec	0

### Inkind/Expense

See Details Inkind Contributed

Month	Value
Jan	0
Feb	0
Mar	117.96
Apr	70.2
May	0
Jun	0
Jul	0
Aug	0
Sep	0
Oct	0
Nov	0
Dec	0

**My Benefits** offers summary reports based on the CVB's interaction with your property. The information you see on this page is specifically related to your property.

\* Leads/RFPs are used by hotel partners only.



# Profile - My Benefits - Events

The screenshot shows the Springfield Connect SGF user interface. The top navigation bar includes the Springfield logo, 'Connect SGF', the user email 'aterhark@springfieldmo.org', a 'Logout' link, and a dropdown menu for 'Springfield Convention & Visitors Bureau'. The left sidebar contains navigation options: HOME, PROFILE, COLLATERAL, and OPPORTUNITIES. The main content area is titled 'My Benefits' and includes links for Overview, Events (highlighted with a red arrow), Leads/RFPs, Inkind/Expenses, and Press Mentions. A blue 'PRINT' button is located below these links. Below the 'PRINT' button is an 'Account' dropdown menu currently set to '-All-'. To the right, the 'Events' section displays a table with the following data:

Name	Status	Date(s)	Account	Attendees
Connect SGF Partner Training	Planning	01/05/2017	Ramada Plaza Hotel & Oasis Convention Center	3
Sales Awareness Committee Meeting - October 7, 2016	Planning	10/07/2016	Ramada Plaza Hotel & Oasis Convention Center	3
Sales Awareness Committee Meeting - June 17, 2016	Planning	06/17/2016	Ramada Plaza Hotel & Oasis Convention Center	3

**Events** shows a list of CVB events in which your business has participated.

# Profile - My Benefits - Leads/RFPs

**Springfield** Connect SGF aterhark@springfieldmo.org Logout Springfield Convention & Visitors Bureau

**My Benefits**

- Overview
- Events
- Leads/RFPs**
- Inkind/Expenses
- Press Mentions

**PRINT**

**Account**  
-All-  
**Month**  
February  
**Year**  
2016  
TO

**Leads**

**Conversion Analysis**

The following is a conversion analysis of all leads that you were sent during this time period. It will help provide some insight as to where in the process you are losing out on these opportunities.

RFPs Sent:	<b>94</b>
Did Not Respond:	<b>12</b>
Turned Down:	<b>18</b>
Decision Pending:	<b>27</b>
Lost to Another City:	<b>8</b>
Lost to Another Property:	<b>16</b>
Booked:	<b>13</b>
Cancelled:	<b>0</b>

**Leads Sent - Conversion**  
Breakdown of Leads Sent During this Period

Legend:

- Did Not Respond (12)
- Turned Down (18)
- Decision Pending (27)
- Lost to Another City (8)
- Lost to Another Property (16)
- Booked (13)
- Cancelled (0)

**Leads/RFPs** shows a conversion analysis of RFPs sent, responded to, pending, lost, booked, cancelled, etc. This section also features a Leads Conversion funnel to provide additional insights about the RFP process.

# Profile - My Benefits - Inkind/Expense

- HOME
- PROFILE
- COLLATERAL
- OPPORTUNITIES
- REPORTS
- ADMINISTRATION

## My Benefits

- Overview
- Events
- Leads/RFPs
- Inkind/Expenses**
- Press Mentions

PRINT

**Account**  
-All-

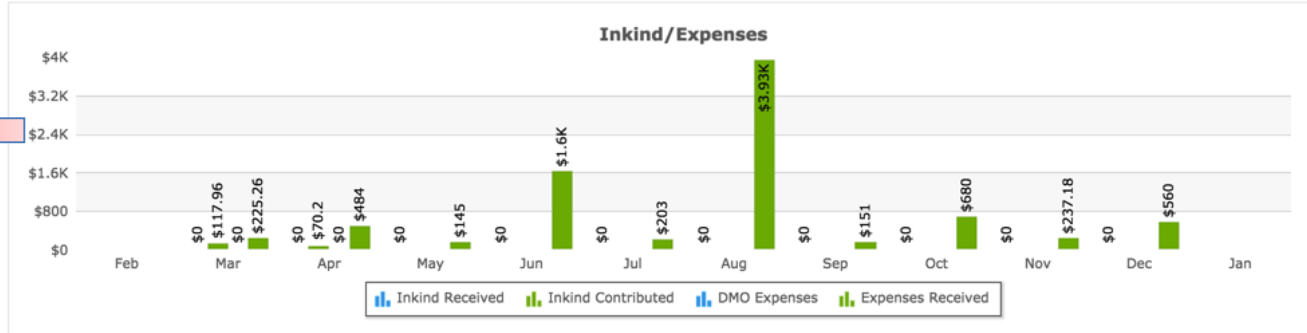
**Month**  
February

**Year**  
2016

**TO Month**  
January

**Year**  
2017

## Inkind/Expenses



Account	Type	Date	Amount	Service	Client
Springfield Convention & Visitors Bureau	Expense Received	12/15/2016	\$560.00	2016 Board Holiday breakfast with staff.	
Springfield Convention & Visitors Bureau	Expense Received	11/10/2016	\$187.18	lunch for staff Diversity Training - November 10, 2016.	
Springfield Convention & Visitors Bureau	Expense Received	11/09/2016	\$50.00	Executive Committee lunch.	
Springfield Convention & Visitors Bureau	Expense Received	10/18/2016	\$303.00	Staff Diversity training lunch	

**Inkind/Expense** highlights inkind donations made by your business and expenses incurred at your business by the CVB.



# Profile - My Benefits - Press Mentions

Springfield
Connect SGF
Whisler@springfieldmo.org [Logout](#)
Springfield Convention & Visitors Bureau
🔍

- HOME
- PROFILE
- COLLATERAL
- OPPORTUNITIES
- REPORTS
- ADMINISTRATION

## My Benefits

- Overview
- Events
- Leads/RFPs
- Inkind/Expenses
- Press Mentions**
- PRINT

## Articles

### Circulation and Value By Month

Month	Circulation	Ad Equiv.
Feb	30.2K	3.52K
Mar	0	14.94
Apr	411.69K	35.76984K
May	8.15K	436.39
Jun	0	64.51
Jul	30.2K	20.78653K
Aug	0	48.34
Sep	2.58M	815.95704K
Oct	177.78K	1.24K
Nov	0	1.77K
Dec	0	2.63218K
Jan	0	0

## Springfield Convention & Visitors Bureau

Headline	Date	Publication	Journalist	Circulation	Ad Value	Medium	Attachment
Heart of America Dairy Expo Program Announced	12/30/2016	My informs			\$236.67		<a href="#">View</a>
Heart of America Dairy Expo Program Announced	12/30/2016	South Dakota Ag Connection			\$1.41		<a href="#">View</a>
Heart of America Dairy Expo	12/30/2016	Iowa Ag			\$1.57		<a href="#">View</a>

**Press Mentions** includes a list of media clips associated with your business. The clips could be in print, television, radio or online. The graph gives a monthly breakdown of circulation and total ad value for the clips.



# Profile - Invoices

Springfield

Connect SGF

aterhark@springfieldmo.org Logout

Springfield Convention & Visitors Bureau

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION

Profile

Manage your Accounts

- Accounts
- Contacts
- My Benefits
- Invoices

Did You Know?

The Springfield Cardinals are the AA affiliate of the St. Louis Cardinals. 2017 marks the 10th year for the Springfield Cardinals.

Click Here to Learn More

All Bulletins

Post Board

Springfield Convention & Visitors Bureau

Ms. Abby Terhark

12/14/2016

The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!


0

# Profile - Invoices






## Invoices

+ 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.

< Page 1 of 1 > Go to Page:  >

Actions	Invoice ID	Account	Type	Invoice Date	Invoice Amount	Paid Amount	Balance Due	Payment Date	Description	
 	1565	Simpleview Hotel and Conference Center	Membership	11/13/2009	\$2,060.00	\$0.00	\$2,060.00		Test	
 		Simpleview Hotel and Conference Center	Membership	12/02/2014	\$300.00	\$0.00	\$300.00			

The invoices section allows you to view and/or pay invoices sent to your property.

To view the details of the invoice you can click the **View** icon or the **Print** icon. To pay an invoice, click the **View** icon to first view the invoice.

**\* Invoices are only visible to the primary billing contact associated with the account.**

# Profile - Invoices

RETURN

PRINT INVOICE

PAY NOW

Sections:

- Recipient Details
- Invoice Details
- Payment Details
- General

Type: Membership

Description: Test

Invoice Date: 11/13/2009

Due Date: 11/13/2009

Invoice Amount: \$2,060

Paid Amount: \$0

Balance Due: \$2,060

Payment Date:

Payment Method:

### Payment Details

Actions	Payment ID	Payment Method	Payment Date	Amount
No Records Were Found				

When viewing an invoice you can see the payment history associated with the invoice.

If the invoice has an outstanding balance, you will see a **Pay Now** button in the top left of the page. Clicking the **Pay Now** button will take you to a secure page to pay using a credit card, much like any online payment portal on the internet.




# Home Screen - Collateral

The screenshot displays the Springfield website's Collateral management interface. The top navigation bar includes the Springfield logo, 'Connect SGF', the user email 'aterhark@springfieldmo.org', a 'Logout' link, and the 'Springfield Convention & Visitors Bureau' dropdown. The left sidebar contains navigation options: HOME, PROFILE, COLLATERAL (highlighted with a red arrow), OPPORTUNITIES, REPORTS, and ADMINISTRATION. The main content area features a 'Collateral' section with options for Listings, Special Offers, Calendar of Events, and Media. A large 'DISCOVER SGF' banner is visible, along with a 'Discover SGF' text box describing a free video-based learning program. Below this is a 'Post Board' section with a dropdown menu set to 'All Bulletins' and a list of bulletins, including one from Ms. Abby Terhark dated 12/14/2016.

Clicking the **Collateral** icon displays options for viewing and/or updating:

- Listings for the website and Visitors Guide,
- Special Offers/Coupons,
- Calendar of Events and
- Media (photos, logos and videos)

Note: Some of these options are only available to view and/or edit and/or add. 

# Collateral - Listings



Connect SGF

aterhark@springfieldmo.org [Logout](#)

Springfield Convention & Visitors Bureau



HOME



PROFILE



COLLATERAL



OPPORTUNITIES



REPORTS



ADMINISTRATION

## Collateral

Manage your Collateral

- Listings
- Special Offers
- Calendar of Events
- Media

# COVERSGF

## Discover SGF

Discover SGF is a FREE online, video-based learning program designed for frontline staff at area hotels, attractions, restaurants and retailers. Participants enjoy free or discounted admission to local attractions and can earn their Springfield Hospitality Professional certification upon completion of the courses.

[Click Here to Learn More](#)

All Bulletins

## Post Board

**wards Banquet!** (Not Read)  
l & Tourism is Feb. 16

**etter** (Not Read)  
sy month at the Convention & Visitors  
Tourist & Tourism awards banquet

Springfield Convention & Visitors Bureau  
Ms. Abby Terhark  
12/14/2016

The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!




# Collateral - Listings

## Listings





+ 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 LISTING](#)

Page 1 of 1 Go to Page:

Actions	Company	Listing Type	Category	Subcategory	Listing ID	
  	Simpleview Hotel and Conference Center	Website	Accommodations	Luxury Resorts	41983	

Page 1 of 1 Go to Page:

After you click the **Collateral** icon and then **Listings**, you will be presented with your property's listings. These listings are used for the CVB website and Visitors Guide.

# Collateral - Listings

The screenshot displays the 'Listing Details' page for 'Route 66 Springfield Visitor Center'. On the left is a dark sidebar with navigation options: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and REPORTS. The main content area is titled 'Listing Details' and features a blue 'EDIT' button with a red arrow pointing to it, and a grey 'RETURN' button below it. A 'Sections:' list on the left includes 'Listing Information', 'Listing UDF Group', 'Categories', 'Details', 'Website Notifications', 'Listing Image', and 'Direct Booking'. The 'Listing Information' section is highlighted and contains a table with the following data:

Account	Route 66 Springfield Visitor Center
Type	Website
Contact	
Listing Description	We provide maps, guides, mementos and heaps of information on all the fun things to see, do and experience in and around Springfield.

Below this is the 'Listing UDF Group' section, which contains a 'Long Description' field with the text: 'Start your adventure at the Route 66 Springfield Visitor Center for inspiration and mementos. As your official travel source, we provide maps, guides, driving directions and heaps of information on all the'.

When you view, edit, or add a listing, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing a listing, the top left will display an **Edit** button. If you are editing a listing, the top left will display a **Save** button. You must click the **Save** button before changes are applied!

**IMPORTANT NOTE: Any edits or adding of listings require approval from the CVB. After saving your updates, the CVB will be notified of your changes/additions.**



# Collateral - Listings

**SAVE**

**CANCEL**

Sections:

- Listing Information
- Listing UDF Group
- Categories
- Listing Image**
- Details
- Website Notifications
- Direct Booking

Listing Image

Select one or more images

Active

Get Your Kicks!  
at the  
Route 66 Information Cen  
10% off  
815 East St. Louis Street (Downtown Spring  
Hours: Mon - Fri, 9am - 5pm  
E Admission 800-678-8767 417-861-5

Details

COMPANY

Route 66 Springfield Visitor Center

When you edit or add a listing, you can select one or multiple images to associate to the listing by selecting the **Listing Images** pull down menu.

After saving your updates, the CVB will be notified of your changes/additions.

# Collateral - Special Offers



Connect SGF

aterhark@springfieldmo.org [Logout](#)

Springfield Convention & Visitors Bureau



HOME

PROFILE



COLLATERAL



OPPORTUNITIES



REPORTS



ADMINISTRATION

## Collateral

Manage your Collateral

- Listings
- Special Offers
- Calendar of Events
- Media

# COVERSGF

## Discover SGF

Discover SGF is a FREE online, video-based learning program designed for frontline staff at area hotels, attractions, restaurants and retailers. Participants enjoy free or discounted admission to local attractions and can earn their Springfield Hospitality Professional certification upon completion of the courses.

[Click Here to Learn More](#)

All Bulletins

## Post Board

**wards Banquet!** (Not Read)  
l & Tourism is Feb. 16

**etter** (Not Read)  
sy month at the Convention & Visitors  
Tourist & Tourism awards banquet

Springfield Convention & Visitors Bureau  
Ms. Abby Terhark  
12/14/2016

The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!



# Collateral - Special Offers

**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	
	20% Off Rooms Sunday through Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

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.

From this screen, you can add, edit or view your special offers. All special offers updates are subject to approval by CVB staff.

# Collateral - Special Offers

Update Offer

SAVE

CANCEL

Sections:

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

Offer Information

Account: Required

Simpleview Hotel and Conference Center

Offer Title: Required

20% Off Rooms Sunday through Thursday Nights

Offer Link:

www.simpleviewinc.com

Offer Text:

Get 20% Off Rooms Sunday through Thursday Nights in the month of August!

Offer Image

Offer Image:

Hotel ( images2.jpg )

When you view, edit, or add an offer, you can quickly scroll to a section on the page by clicking the links on 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 will display a **Save** button. You must click the **Save** button before changes are applied!

**IMPORTANT NOTE:** Any edits or adding of offers will require approval from the CVB. After saving your updates, the CVB will be notified of your changes/additions.





# Collateral - Calendar of Events

The screenshot shows the Springfield Convention & Visitors Bureau website. The top navigation bar includes the Springfield logo, a 'Connect SGF' link, the email 'aterhark@springfieldmo.org', a 'Logout' link, and the current page 'Springfield Convention & Visitors Bureau'. A search icon is in the top right corner.

The left sidebar contains a navigation menu with the following items: HOME, PROFILE, COLLATERAL (highlighted in teal), OPPORTUNITIES, REPORTS, and ADMINISTRATION. A red arrow points to the COLLATERAL menu item.

The main content area is titled 'Collateral' with the subtitle 'Manage your Collateral'. Below this are four menu items: Listings, Special Offers, Calendar of Events (highlighted in teal with a red arrow pointing to it), and Media.

The main content area features a large graphic that says 'DISCOVER SGF' in green and black letters. To the right of this graphic is a grey box titled 'Discover SGF' containing the following text: 'Discover SGF is a FREE online, video-based learning program designed for frontline staff at area hotels, attractions, restaurants and retailers. Participants enjoy free or discounted admission to local attractions and can earn their Springfield Hospitality Professional certification upon completion of the courses.' Below this text is a button that says 'Click Here to Learn More'.

Below the 'Collateral' menu, there is a dropdown menu for 'All Bulletins'. To the right of this is a 'Post Board' section with a blue edit icon. The Post Board contains a post from 'Springfield Convention & Visitors Bureau' by 'Ms. Abby Terhark' dated '12/14/2016'. The post text reads: 'The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!'.

At the bottom right of the page is the Springfield logo.

# Collateral - Calendar of Events

**Events**

+ 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 EVENT** Page 1 of 1 Go to Page: 1

Actions	Event ID	Title	Priority	Start Date	End Date	Event Category	
	57	Bossista	Gold	07/07/2015	07/07/2015	Family, Arts and Culture, Historical	
	59	Simpleview Festival	Platinum	07/08/2015	07/08/2015	Sports, Family	

Page 1 of 1 Go to Page: 1

After you click the **Collateral** icon and then **Calendar of Events**, you will be presented with your property's events.

From this screen, you can add, edit or view your event listings. All Calendar of Event listing updates are subject to approval by CVB staff.

# Collateral - Calendar of Events

**SAVE**

**CANCEL**

Sections:

- Event Information
- Event Location
- Event Dates
- Image Gallery
- General

One Day Daily **Weekly** Monthly Yearly

Weekly Recurrence Options

Every  Week(s) on **MONDAY, TUESDAY, WEDNESDAY**

Recurrence End

**No End Date**

End after  occurrences

End on

The Calendar of Events has a recurrence model built in. You can make your event a one-time event, daily, weekly, monthly or yearly. If it is not a one-day event, you can choose your recurring days of the event. Depending upon if it is daily, weekly, monthly or yearly, your recurrence may change. At the bottom of the recurrence section, you can choose to end your event after a certain number of occurrences or on a specified date.

# Collateral - Calendar of Events

The screenshot shows a user interface for managing event collateral. On the left, there is a vertical sidebar with a dark background. At the top of the sidebar are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' menu with the following items: 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The 'Image Gallery' section is currently selected. The main content area is titled 'Image Gallery' and features a large dashed rectangular box. Inside this box, the text reads 'Drag and Drop Files here' followed by 'or use the "Browse" button below to find files to add'. A blue 'BROWSE' button is positioned below the text. A red arrow points to the 'Image Gallery' title, and another red arrow points to the 'Drag and Drop Files here' text. Below the dashed box, there is a small thumbnail image of a landscape with trees and a sunset.

As with Listings and Special Offers, you can add images to your event. Adding images to an event is a little different though. In the image gallery section on the event, you can drag and drop an image or click the **Browse** button to search your computer for an image.

# Collateral - Media



Connect SGF

aterhark@springfieldmo.org [Logout](#)

Springfield Convention & Visitors Bureau



- HOME
- PROFILE
- COLLATERAL**
- OPPORTUNITIES
- REPORTS
- ADMINISTRATION

## Collateral

Manage your Collateral

- Listings
- Special Offers
- Calendar of Events
- Media**

# COVERSGF

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[Click Here to Learn More](#)

All Bulletins

## Post Board

- wards Banquet!** (Not Read)  
l & Tourism is Feb. 16
- etter** (Not Read)  
sy month at the Convention & Visitors  
Tourist & Tourism awards banquet

**Springfield Convention & Visitors Bureau**  
Ms. Abby Terhark  
12/14/2016

The new 2017 Visitors Guides are here! Be sure to pick up a copy to check out a new format or a box to distribute at your business!



# Collateral - Media


Media

Filters (0) Manage Filters





Account is one of:

CHOOSE ▾

APPLY FILTERS

ADD NEW MEDIA 

Page 1 of 1 Go to Page: 1

Actions	Title	Image
  	Hotel	

After you click the **Collateral** icon and then **Media**, you will be presented with your property's photos, logos and videos available for use on listings and special offers.



# Collateral - Media

**New Media**

**SAVE**

**CANCEL**

Sections:

[Media Information](#)

**Media Information**

**Account:** ◀Required

--Choose One--

**Type:** ◀Required

✓ --Choose One--

Image

YouTube

Logo

**Title:** ◀Required

Sort Order:

When creating a new media record, you must select a Type. Media types include:

1. Image (Photo)
2. Logo
3. YouTube (or Vimeo) links

Once you've saved a media record, you cannot change the type.

# Collateral - Media

SAVE

CANCEL

Sections:

Media Information

Image

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:

CHOOSE AMONG THE FOLLOWING... ▼ ←

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.

\* Images should be horizontal and at least 1920x1080 pixels.



# Opportunities - RFPs

The screenshot displays the Springfield Convention & Visitors Bureau website interface. At the top, the Springfield logo is on the left, and the user's email (mhandyside@springfieldoasis.com) and location (Ramada Plaza Hotel & Oasis Convention Center) are on the right. A search icon is also present.

The left sidebar contains navigation options: HOME, PROFILE, COLLETERAL, OPPORTUNITIES (highlighted with a red arrow), REPORTS, and ADMINISTRATION.

The main content area features a teal sidebar titled "Opportunities" with the sub-header "Manage your Opportunities". It lists three categories: RFPs (highlighted with a red arrow), Media Leads, and Service Requests.

The main content area displays a large banner for the "2017 Salute Travel & Tourism Awards Banquet" with a palm tree graphic. To the right of the banner is a text box for the "2017 Annual Banquet" with the text: "Reserve your tickets to the 2017 Salute to Travel & Tourism Awards Banquet. February 16, 2017 at the Ramada Plaza Hotel - Paradise Ballroom." and an "RSVP Today!" button.

Below the banner is a "Post Board" section with a dropdown menu set to "All Bulletins". It shows two bulletins: "2017 Awards Banquet! (Not Read)" and "New Visitor Letter (Not Read)".

# Opportunities - RFPs

**RFPs**

Filters (1) Manage Filters

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Status is one of:

**APPLY FILTERS** **CLEAR FILTERS**

After you click the **Opportunities** icon and then **RFPs**, you will be presented with your property's Sales and Tour Leads. The filters in this grid determine what leads are presented. You can change your filters to narrow your results. This is done 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.

# Opportunities - RFPs

Lead Name contains:

Create Date:

Lead ID contains:




Organization contains:

Group Type is one of:

Property Lead Status is one of:

APPLY FILTERS

CLEAR FILTERS

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization
	31724	2018 Annual Reunion	Closed/ No Bid Sent	11/22/2016	Meeting	Reunion	1st Battalion, 9th Marines
	31653	Annual Reunion	Closed/ Lost to Another City	08/12/2016	Meeting	Reunion	USS Coral Sea
	31776	Annual Reunion	Closed/ Lost to	07/17/2015	Meeting	Reunion	USS Witek (EDD)

# Opportunities - RFPs

## LEAD STATUS DEFINITIONS

On the extranet you will see 10 statuses where leads exist. 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 your property has not bid on 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 been lost.
- 7. Closed Cancelled:** These are leads where 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.
- 10. Closed Lost:** These are definite leads in which your property was not selected for the business.
- 11. Assist:** This is a lead the hotel booked directly with the group but the CVB provided convention services to the group.



# Opportunities - RFPs

**PRINT**

**RETURN**

Sections:

- Revision Notes
- Lead Information
- Meeting Dates
- Room Summary
- History/Futures
- Notes
- Responses
- Room Data
- General

crm@simpleviewinc.com  
123.123.1234

Meeting Requirements See attached RFP for more details.

Schedule of Events

Action Requested

Comments

Competitive Sites

Meeting Specs 2016-Annual-Convention-RFP.docx

Lost Business Code

Lost Comments

When viewing the lead, you can skip to different sections by clicking the left navigation.

In the above graphic, this is the lead section; attachments are in the Meeting Specs field.

# Opportunities - RFPs



Sections:

- Revision Notes
- Lead Information
- Meeting Dates
- Room Summary
- History/Futures
- Notes
- Responses
- Room Data
- General



### 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		

After you review the lead, scroll to the Responses section. Here you will see options to 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 **Edit** icon to enter/edit your response.



# Opportunities - RFPs

## 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 adding/editing your response, you will need to tell the CVB if you are pursuing the business by selecting **Yes** or **No** to the Pursuing this Lead option.

# Opportunities - RFPs

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		

The Room Information section of the response page is where you can enter the number of rooms, by room type, your property can commit for this lead.



# Opportunities - RFPs

SAVE

CANCEL

Sections:

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

Total	0	0	0	0	0
Requested	10	10	10	10	10

### 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 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 - RFP Pickup

The screenshot shows the Springfield Convention & Visitors Bureau website interface. The top navigation bar includes the Springfield logo, 'Connect SGF', the user email 'mhandyside@springfieldoasis.com', a 'Logout' link, and the location 'Ramada Plaza Hotel & Oasis Convention Center'. A search icon is on the far right. The left sidebar contains navigation links: HOME, PROFILE, COLLETERAL, OPPORTUNITIES (highlighted in blue), REPORTS, and ADMINISTRATION. The main content area features a teal sidebar for 'Opportunities' with sub-links: 'Manage your Opportunities', 'RFPs' (indicated by a red arrow), 'Media Leads', and 'Service Requests'. The main content displays a banner for the '2017 Salute to Travel & Tourism Awards Banquet' with a palm tree graphic. To the right is a '2017 Annual Banquet' announcement with an 'RSVP Today!' button. Below the banner is a 'Post Board' section with a dropdown menu set to 'All Bulletins'. Two bulletin items are visible: one for the '2017 Salute to Travel & Tourism Awards Banquet!' (Not Read) dated Feb. 16, and another for 'New 2017 Visitors Guides' (Not Read) dated 12/14/2016.

A part of the lead process may be to add **Room Pickup** information. This data can only be added to RFPs your property has won and if the CVB has identified you as a Pickup Manager.



# Opportunities - RFP Pickup

RFPs

The screenshot shows a filter grid for RFPs. On the left, there are four filter rows: 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', and 'Group Type is one of:'. The 'Group Type is one of:' dropdown is set to 'CHOOSE'. At the bottom left are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons. On the right, there are four filter rows: 'Response Date:', 'Create Date:', 'Organization contains:', and 'Property Lead Status is one of:'. The 'Property Lead Status is one of:' dropdown is set to '3 SELECTED' and is expanded to show a list of status options. A red arrow points to the 'CHOOSE' dropdown, and another red arrow points to the 'Closed/ Won' option in the expanded status list.

**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:**

- Closed/ No Bid Sent
- Open ✓
- Open/ Bid Sent ✓
- Turned Down
- Closed/ Decision Pending
- Closed/ Lost to Another City
- Closed/ Cancelled
- Closed/ Won ✓
- Closed/ Won - Properties TBD
- Closed/ Lost
- Assist

**APPLY FILTERS** **CLEAR FILTERS**

To see what past business is available for your property to report pickup on, access the RFP page. Adjust the Filter Grid to include a status of **Closed/Won** and then apply filters. To limit the results to a specific lead, you can provide the Lead ID.

# Opportunities - RFP Pickup

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12169	<a href="#">Simpleview Summit 2016</a>	Closed/Won	11/25/2015	Meeting	Convention	chris martin account	<a href="#">Simpletime z hotel</a>	12/31/2015	04/18/2016	04/20/2016	
	10058	<a href="#">Karate for Kids Meeting 2015</a>	Closed/Won	01/01/2007	Meeting	Group	Karate for Kids	<a href="#">Hilton by the Shore</a>	12/01/2015	12/15/2015	12/18/2015	

To access the lead, click on the **View** icon or the Lead Name.

# Opportunities - RFP Pickup

PRINT

RETURN

Sections:

[Revision Notes](#)  
[Lead Information](#)  
[Meeting Dates](#)  
[Room Summary](#)  
[History/Futures](#)  
[Notes](#)  
[Responses](#)  
[Room Data](#) ←  
[General](#)

Lead ID 10058  
Meeting Name Karate for Kids Meeting 2015  
Account Hilton by the Shore  
Profile Karate Affiliation  
Organization Karate for Kids  
Organization 4956 N Park Ln  
Address Bonham TX 75418  
Contact Rita Duncan  
4956 N Park Ln  
Bonham TX 75418  
United States  
520-424-1020 (Ext. 680)  
rduncan@karateforkids.com

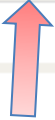
Meeting Planner  
Contact

Pickup information is contained within the Room Data section.

# Opportunities - RFP Pickup

## Room Data

Add/Edit	Property	Booked Rooms by Days Out				Total Pickup
		120 Days	90 Days	60 Days	30 Days	
<a href="#">Daysout   Pickup</a>	Hilton by the Shore					



Click on the Pickup button to access the room block information.

# Opportunities - RFP Pickup

SAVE

CANCEL

Sections:

[Lead Information](#)

[Room Summary](#)

[Pickup Rooms](#)



Peak requested 25

Additional room requests/needs

## Pickup Rooms

Pickup Rooms:

0

Pickup Avg. Daily Room Rate:

\$ \$0.00

Sun	Mon	Tue	Wed	Thu	Fri	Sat
12/20/2015	12/21/2015	12/22/2015	12/23/2015	12/24/2015	12/25/2015	12/26/2015
0	0	0	0			

The Pickup Rooms section is where you can enter the number of rooms and average daily room rate your property provided for this lead.

Be sure to click **Save** after you have supplied the appropriate room information.



# Filters and Data Grids

## RFPs

**Filters (1)** ➔ Manage Filters

**Responded is:**

**Lead Name contains:**

**Lead ID contains:**

**Group Type is one of:**

**Response Date:**

**Create Date:**

**Organization contains:**

**Status is one of:**

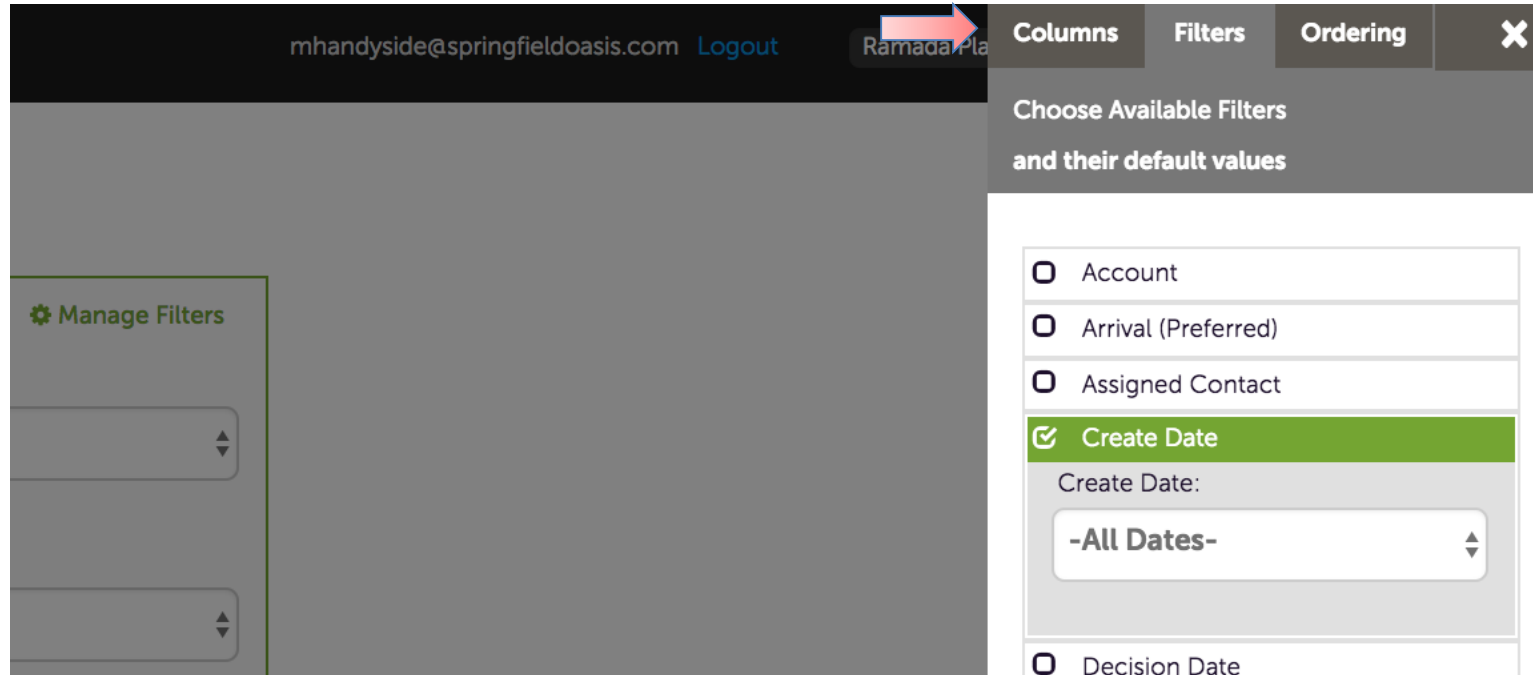
**APPLY FILTERS** **CLEAR FILTERS**

The following settings can be configured by each individual user when using the extranet.

**Filters** – Allow users to narrow display results by changing their filter settings. Filters can be customized by clicking the **Manage Filters** option in the top right corner of this section.



# Filters and Data Grids - Manage Filters



After clicking on **Manage Filters**, you have the opportunity to customize the way you view columns, filter options and data order.

This allows you to choose to view every available field within the section.



**Thank You!**

Questions? Call Abby at 417-  
881-5300, ext. 121