



Paducah Partner Portal
Extranet User Guide

Presented by the Paducah Visitors Bureau & Simpleview, Inc.

Connect. Partner. Drive Visitation.

Hello Visitor Industry Partner!

Thank you for engaging with the Paducah Convention & Visitors Bureau to drive economic impact through tourism in Paducah-McCracken County.

Launched in January 2017, the Paducah Partner Portal is a key collaboration tool and visitor industry engagement portal. Review this Extranet User Guide to maximize your partnership with the CVB.

Bookmark paducah.travel/industry for helpful links and industry resources, and feel free to reach out to the CVB Sales & Marketing Team with questions!



Fowler Black
Director of Sales
fowler@paducah.travel



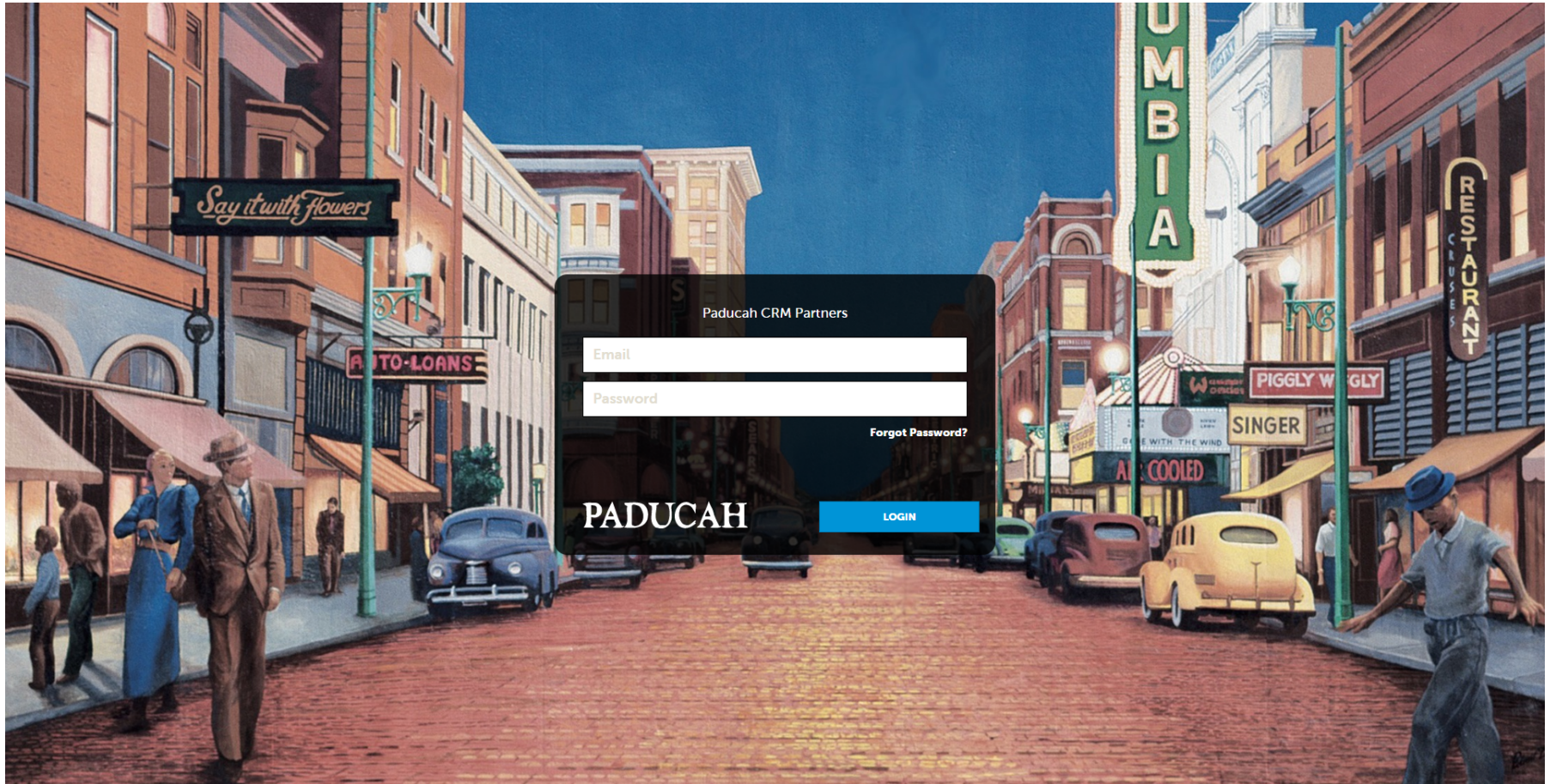
Lynda Peters-Jones
Director of Convention Sales
lynda@paducah.travel



Laura Oswald
Director of Marketing
laura@paducah.travel



Paducah Partner Portal LOGIN Screen



Log in to the Paducah Partner Portal at www.paducah.extranet.simpleviewcrm.com

IMPORTANT NOTE: If you forgot your login or password, the Paducah CVB can assist!
Contact the CVB to set up a new user login or recover a forgotten password.



Home Screen

PADUCAH

Paducah CRM Partners

aberry@simpleviewinc.com [Logout](#)

Simpleview

Q

HOME


PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

ADMINISTRATION



Paducah Visitor Industry

Unite with the Paducah CVB and local visitor industry partners to make tourism work for Paducah-McCracken County! We've posted a new Visitor Industry page of resources and quick links on [paducah.travel](#).

[View HERE](#)

Partner Bulletins

All Bulletins

Post Board

2018 Select Traveler Appointments (Not Read)
February 4-6, 2018 Notes from 30 face-to-face appointments with bank travel club coordinators, alumni groups, & other affinity groups. Feel free to browse the PDF attached to review interest on Paducah. If there are any appointments that are qualified leads, those leads will appear in the RFP or Service Request tab. FB
[View Full](#)

Visitor Industry Summit Recap - Foreign Individual Travelers (FIT) (Not Read)
Jay Kirkpatrick, Director of Sales, Sweet Magnolia Tours, informed the Paducah visitor industry about foreign individual travelers (FITs) and how to be FIT-ready as the international inbound arrivals to the U.S. and the region grow!
[View Full](#)

Paducah Parks & Recreation Department
Molly Thomasallo
09/11/2018
WOOFTOBER OCTOBER 6th---AT STUART NELSON DOG PARK---
Kicking off with:

Rover Run/Walk 5K
-Registration at 10:30am
-5K starts at 11:00am
[Read More...](#)

The **image carousel** displays selected images from your destination and may provide links the Paducah Visitors Bureau would like you to follow within the portal, to resources on Paducah.travel or to another website.



Home Screen (cont'd)

PADUCAH Paducah CRM Partners aberry@simpleviewinc.com Logout Simpleview

HOME
PROFILE
COLLATERAL
OPPORTUNITIES
REPORTS
ADMINISTRATION

PORT OF PADUCAH, KY WELCOME

Paducah Visitor Industry
Unite with the Paducah CVB and local visitor industry partners to make tourism work for Paducah-McCracken County! We've posted a new Visitor Industry page of resources and quick links on paducah.travel.
[View HERE](#)

Partner Bulletins All Bulletins

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Post Board

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Molly Thomasallo
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Post Board allows you to communicate with other visitor industry partners in the 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)

The screenshot displays the Home Screen interface. On the left is a dark sidebar with 'REPORTS' and 'ADMINISTRATION' links. The main content area features a 'WELCOME' banner at the top. Below it, the 'Partner Bulletins' section is highlighted with a red arrow. It contains three bulletins, each with a title, a brief description, and a 'View Full' link. The first bulletin is about 2018 Select Traveler Appointments, the second is a recap of the Foreign Individual Travelers (FIT) summit, and the third is a recap of the Q4 2017 visitor industry summit. The 'Post Board' section on the right shows a list of posts from the Paducah Parks & Recreation Department and the Paducah Convention & Visitors Bureau, including details about events like the WOOFTOBER and Rover Run/Walk 5K.

REPORTS

ADMINISTRATION

Partner Bulletins

All Bulletins ▾

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[View Full](#)

Visitor Industry Summit Recap - Q4 2017 (Not Read)

The Paducah Visitor Industry gathered at Paducah School of Art & Design for the fourth and final quarterly visitor industry summit of 2017. View a recap of topics included FITs and international tourism development, storytelling and meeting/convention development!
[View Full](#)

Visitor Industry Summit Recap - Kentucky Travel & Tourism Week (Not Read)

National Travel and Tourism Week 2017 is all about celebrating the power of travel, and particularly the people who make our industry remarkable. View a recap of our most recent visitor industry summit to kick off Kentucky/National Travel & Tourism Week in Paducah!
[View Full](#)

Post Board

Paducah Parks & Recreation Department
Molly Thomasallo
09/11/2018
WOOFTOBER OCTOBER 6th---AT STUART NELSON DOG PARK---
Kicking off with:

Rover Run/Walk 5K
-Registration at 10:30am
-5K starts at 11:00am
[Read More...](#)

Paducah Parks & Recreation Department
Molly Thomasallo
09/11/2018
OCTOBER 6th

Our 2nd annual Rover Run/Walk 5K
-\$5.00 Entry Fee upon registration (donated to local animal charity)
-Registration at 10:30am
-Starts at 11:00am
[Read More...](#)

Paducah Convention & Visitors Bureau
Fowler Black
06/12/2018
Notes from the 2018 Select Traveler Appointments have been posted to the Partner Bulletin column (to left). Attached are notes from those pre-scheduled 6-minute

Partner Bulletins are important notices, visitor industry summit documentation, events, etc... Extra important bulletins will be marked with a blue and white exclamation mark!



Home Screen (cont'd)

PADUCAH Paducah CRM Partners rblessing@simpleviewinc.com Logout Simpleview

Profile
Manage your Accounts

- Accounts
- Contacts

Welcome to the Paducah Partner Portal!

It's easy to stay connected with the Paducah CVB team... Respond to opportunities and manage your collateral right here in the portal! Click through this slide show for important visitor industry news and rotating destination highlights

All Bulletins Post Board

(Not Read)
face-to-face appointments with bank
ps, & other affinity groups. Feel free
w interest on Paducah. If there are
leads, those leads will appear in the

Paducah Parks & Recreation Department
Molly Thomasallo
09/11/2018
WOOFTOBER OCTOBER 6th---AT STUART NELSON DOG PARK---
Kicking off with:
Rover Run/Walk 5K

By clicking the **PROFILE** icon, you can view/edit your property's information and contacts associated with your property. More on these options later in the presentation.



Home Screen (cont'd)

PADUCAH Paducah CRM Partners rblessing@simpleviewinc.com Logout Simpleview

Collateral
Manage your Collateral

- Listings
- Calendar of Events
- Media

Event Planning & Groups

Paducah's creative culture sets the stage for engaging group tours, successful meetings and memorable events! Utilize the CVB's Event Planning & Groups portal to help planners and tour operators plan for unforgettable Paducah experiences.

Toolkit [HERE](#)

All Bulletins Post Board

(Not Read)

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Paducah Parks & Recreation Department
Molly Thomasallo
09/11/2018
WOOFTOBER OCTOBER 6th---AT STUART NELSON DOG PARK---
Kicking off with:
Rover Run/Walk 5K

By clicking the **COLLATERAL** icon, you can view your property's listing(s) on Paducah.travel, events listed in the Paducah.travel Calendar of Events and media (i.e. images). More on these options later in the presentation.



Home Screen (cont'd)

PADUCAH Paducah CRM Partners rblessing@simpleviewinc.com Logout Simpleview

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

Opportunities
Manage your Opportunities

- RFPs
- Media Leads
- Service Requests

Welcome to the Paducah Partner Portal!
It's easy to stay connected with the Paducah CVB team... Respond to opportunities and manage your collateral right here in the portal! Click through this slide show for important visitor industry news and rotating destination highlights.

All Bulletins Post Board

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Paducah Parks & Recreation Department
Molly Thomasallo
09/11/2018
WOOFTOBER OCTOBER 6th---AT STUART NELSON DOG PARK---
Kicking off with:

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



Manage Profile - Accounts

The screenshot displays the 'Accounts' management interface. On the left is a dark sidebar with icons and labels for HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and REPORTS. The top header bar includes the 'PADUCAH' logo, the text 'Paducah CRM Partners', the user email 'rblessing@simpleviewinc.com' with a 'Logout' link, a 'Simpleview' dropdown menu, and a search icon. The main content area is titled 'Accounts'. It features a filter box with a minus icon, 'Filters (0)', and a 'Manage Filters' link. Inside the filter box, it says 'Status is one of:' followed by a 'CHOOSE' dropdown menu and an 'APPLY FILTERS' button. A large red arrow points from the 'APPLY FILTERS' button to the table below. The table has two columns: 'Actions' and 'Account'. The 'Account' column contains the text 'Simpleview' and a dropdown menu with options 'Manage Amenities' and 'Manage Meeting Space'. The table is followed by pagination controls showing 'Page 1 of 1' and 'Go to Page: 1'.

After you click the **PROFILE** icon and then Accounts, you will be presented with your property's 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. Clicking the pencil icon will allow you to edit this information. By clicking the eyeball icon, you can view your information. The down arrow icon will allow you to view and edit relevant amenity information for your property.



Manage Profile - Accounts (cont'd)

SAVE

CANCEL

Sections:

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

Account Information

Account: Simpleview

Region: Required Paducah

Website: http://www.simpleviewinc.com

Email: fake_email@simpleviewinc.com

Phone Information

Primary: (555) 555-5555 Ext

Alternate: Ext

Toll Free: (800) 555-5555

Fax: Ext

When you view or edit your account 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 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!



Manage Profile - Contacts

PADUCAH

Paducah CRM Partners

rblessing@simpleviewinc.com

Logout

Simpleview

Q

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

REPORTS

Contacts

Filters (0)

Manage Filters

Account is one of:
CHOOSE







Contact Type is one of:
CHOOSE

APPLY FILTERS

ADD CONTACT

Page 1 of 1

Go to Page: 1

Actions	Full Name	Account	Title	Email	Contact Type	
  	Angel Berry	Simpleview	Simpleview Testing	aberry@simpleviewinc.com	Primary	
  	Cheyenne Berry	Simpleview	Marketing Person	angelberry331@yahoo.com	Secondary	

After you click the **PROFILE** icon and then Contacts, you will be presented with a list of the contact(s) associated with your property. On this page you can Add, Edit, View and Clone (i.e. duplicate) a contact depending upon your extranet permissions.



Manage Profile - Contacts (cont'd)

PADUCAH Paducah CRM Partners rblessing@simpleviewinc.com Logout Simpleview

Update Contact

SAVE **CANCEL**

Sections:

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

Contact Information

Account: ◀Required Simpleview

First Name: ◀Required Angel

Last Name: ◀Required Berry

Full Name: ◀Required Angel Berry

Department:

Title: Simpleview Testing

Contact Type: ◀Required Primary

Preferred Contact Method: Email

Email:

Send Email:

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 bureau and/or change their contact type to “Inactive”.



Collateral - Listings

PADUCAH

Paducah CRM Partners

rblessing@simpleviewinc.com Logout

Simpleview

Q

HOME

PROFILE

COLLATERAL


OPPORTUNITIES



REPORTS

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.

Actions	Company	Listing Type	Category	SubCategory	Listing ID	
	Simpleview	Guide	Guide	Guide	924	


Page 1 of 1






Go to Page: 1

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 print guide listings. By clicking the eyeball icon, you can view your listing information.



Collateral – Listings (cont'd)

PADUCAH Paducah CRM Partners [rblessing@simpleviewinc.com](#) [Logout](#) Simpleview 

 HOME
 PROFILE
 COLLATERAL
 OPPORTUNITIES
 REPORTS

Listing Details

[RETURN](#)

Sections:

- [Listing Information](#)
- [Categories](#)
- [Details](#)
- [Website Notifications](#)
- [Listing Image](#)

Listing Information

Account	Simpleview
Type	Guide
Contact	
Address Type	Account: Physical
Rank	
Listing Description	This is info that will display in the visitors guide

Categories

Category	Guide
SubCategory	Guide

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



Collateral – Calendar of Events

PADUCAH

Paducah CRM Partners

rblessing@simpleviewinc.com Logout

Simpleview

Q

HOME

PROFILE

COLLATERAL


OPPORTUNITIES

REPORTS

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	Rank	Start Date	End Date	Event Category	
<div><div></div></div>	22423	Training Event	Special Events	05/31/2019	05/31/2019	Festivals	

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. The pencil icon will allow you to edit an existing event. By clicking the eyeball icon, you can view the existing event. The clone icon will allow you to duplicate an event. You can also create a new event by clicking the Add Event button. When there's a clock icon, that means the event is pending approval.



Collateral –Calendar of Events (cont'd)

PADUCAH Paducah CRM Partners rblessing@simpleviewinc.com Logout Simpleview

Event Details

EDIT **CLONE** **RETURN**

Sections:

- [Event Information](#)
- [Event Location](#)
- [Event Dates](#)
- [Image Gallery](#)

Event Information

Title	Training Event
Pending	Yes
Contact	Ron Blessing
Admission	
Description	This is where a description of the event would live. PLEASE DO NOT APPROVE.
Email	
Rank	Special Events
Host	

When you view, edit, or add an event, 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 event, the button in the top left will say Edit. If you are editing an event, 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 additions of events will require approval from the CVB. Upon saving your updates, the CVB will be notified of your changes/adds.



Collateral –Calendar of Events (cont'd)

The screenshot displays a web form for creating an event. On the left is a sidebar with a dark vertical bar and a list of sections: 'Event Information', 'Event Location', 'Event Dates', 'Image Gallery', and 'General'. The main form area has a top bar with 'SAVE' and 'CANCEL' buttons. Below this is a row of tabs for recurrence frequency: 'One Day', 'Daily', 'Weekly' (selected), 'Monthly', and 'Yearly'. A red arrow points to the 'Weekly' tab. The 'Weekly Recurrence Options' section contains a green bar with a checked checkbox, the text 'Every 1 Week(s) on MONDAY, TUESDAY, WEDNESDAY', and a dropdown arrow. A red arrow points to this dropdown. The 'Recurrence End' section has three options: 'No End Date' (grey), 'End after 0 occurrences' (grey), and 'End on 09/30/2015' (green). Two red arrows point to the 'End after' and 'End on' options respectively.

SAVE

CANCEL

Sections:

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

One Day Daily **Weekly** Monthly Yearly

Weekly Recurrence Options

☒ Every **1** Week(s) on **MONDAY, TUESDAY, WEDNESDAY**

Recurrence End

☐ No End Date

☐ End after **0** occurrences

☒ End on **09/30/2015**

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 specified dates.



Collateral –Calendar of Events (cont'd)

SAVE

CANCEL

Sections:


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

Image Gallery

Drag and Drop Files here

or use the "Browse" button below to find files to add

BROWSE



As with Listings, you can add images to your events. Adding images to events is done in a different way. 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

PADUCAH Paducah CRM Partners rblessing@simpleviewinc.com Logout Simpleview

HOME
 PROFILE
 COLLATERAL
 OPPORTUNITIES
 REPORTS

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	Description	Image	Listing Count	
	Front Building			0	

After you click the COLLATERAL icon and then Media, you will be presented with your property(s) images available for listings. 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.



Collateral – Media (cont'd)

The screenshot displays a web interface for managing collateral media. On the left is a dark sidebar with a 'REPORTS' button. The main content area features a top bar with 'SAVE' and 'CANCEL' buttons. Below this is a 'Sections:' label followed by a link for 'Media Information'. The central form includes a 'Description:' text area, a 'File:' section with a red 'Required' indicator, a large dashed box for file upload with the text 'Drag and Drop File To Page' and a red arrow pointing left, and 'BROWSE' and 'REMOVE' buttons. Below the upload area is a note: 'You can drag a file to the page to replace this file or use the "Browse" button'. At the bottom is a 'Listings:' section with a dropdown menu labeled 'CHOOSE AMONG THE FOLLOWING...' and a red arrow pointing left.

As with Calendar of Events 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.



Opportunities – RFPs

The screenshot shows the PADUCAH CRM interface. The top header includes the logo, user name 'Paducah CRM Partners', email 'rblessing@simpleviewinc.com', a 'Logout' link, a 'Simpleview' dropdown, and a search icon. The left sidebar contains navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES (highlighted with a red arrow), and REPORTS. The main content area is titled 'RFPs' and contains a filter section. The filter section is titled 'Filters (1)' and includes a 'Manage Filters' link. It contains several filter fields: 'Responded is:' (dropdown), 'Response Date:' (dropdown with '-All Dates-' selected), 'Lead Name contains:' (text input), 'Create Date:' (dropdown with '-All Dates-' selected), 'Lead ID contains:' (text input), 'Organization contains:' (text input), 'Group Type is one of:' (dropdown with 'CHOOSE' selected), and 'Property Lead Status is one of:' (dropdown with 'OPEN, OPEN/ BID SENT' selected). At the bottom of the filter section 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. Your filters 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, there are 10 different lead statuses you may see. 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 past.
- 2. Open:** These are leads in a tentative status that your property has not bid on yet and the response due date has not past.
- 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 past. 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 past 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)

APPLY FILTERS

CLEAR FILTERS

Page 1 of 1

Go to Page: 1

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	1271	Test	Open	11/25/2014	Meeting		Simpleview Sales Account Test	Simpleview	11/25/2019	11/29/2019	11/30/2019	

Page 1 of 1

Go to Page: 1

Below the Filters section, you will see a Data Grid with all your leads based upon your chosen filters. As mentioned in the Filters and Data Grid section of this presentation, 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 what type of lead you're viewing.

To view the lead, click on the Eyeball icon or the Lead Name.



Opportunities – RFPs (cont'd)

OPPORTUNITIES

REPORTS

RETURN

Sections:

- [Revision Notes](#)
- [Lead Information](#)
- [Meeting Dates](#)
- [Room Summary](#)
- [Responses](#)
- [Room Data](#)

Meeting Name Test

Organization Simpleview Sales Account Test

Type

Market Segment

Decision-Making Process

Meeting Pattern

Room Attendees 100

Decision Date 11/25/2019

Site inspection No

Response Due 11/25/2019

Confidential No

Repeat Business No

Meeting Requirements See attachment for full specs.

Schedule of Events

Action Requested

Meeting Specs

Lost Business Code

Lost Comments

When viewing the lead, you can skip to difference 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 Notes section, see next slide.



Opportunities – RFPs (cont'd)

PRINT

RETURN

Sections:

- Revision Notes
- Lead Information
- Meeting Dates
- Room Summary
- Responses
- Room Data

Room Summary

Requested Rooms		Fri 11/29	Sat 11/30	Sun 12/01	Mon 12/02	Tue 12/03	Wed 12/04	Thu 12/05
Rooms		100	100	-	-	-	-	-
% of Peak		100%	100%	-	-	-	-	-
Requested Rooms	200							
Peak Requested	100							
Additional room requests/needs								

Responses

Simpleview

Status Open

Contracts

PRINT RESPONSE LOG

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	11/29/2019 - 11/30/2019 **Preferred Date**	11/29/2019 - 11/30/2019		

In the Response section, you will see options to add or edit your existing response.

IMPORTANT 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)

COLLATERAL

OPPORTUNITIES

REPORTS

SAVE

CANCEL

Sections:

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

Meeting Name: Test

Organization: Simpleview Sales Account Test

Contact: GDPR Removal
Tucson AZ 85741
USA

3rd Party Meeting Planner

Meeting Planner Contact

Additional room requests/needs

Response Information

Pursuing This Lead: ◀Required

☐ NO ☐ YES

Account: ◀Required

Simpleview

Bureau-Only Comments:

When 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 (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, you can commit to for this lead in the Room Information section of the response page.



Opportunities – RFPs (cont'd)

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

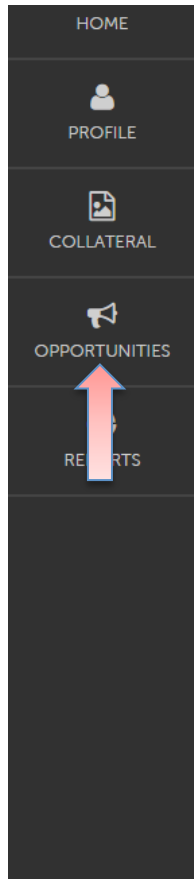
To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button to browse your hard drive for the attachments. You can also click and drag your attachment from your computer to the attach file section.

Once you have finished entering all your response information, don't forget to click the save button!



Opportunities – Service Requests

Service Requests



Filters (0)

Manage Filters

Status is one of:

CHOOSE

APPLY FILTERS

Page 1 of 1 Go to Page: 1


Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees	
	Meeting Venue Space	Simpleview	Meeting Room Request	01/31/2017	06/19/2017	06/19/2017	250	
	Angel Test SR	Simpleview	Meals	09/30/2015	09/30/2015	10/01/2015		
	Accommodations Request	Simpleview	Accommodations	02/13/2015	02/26/2015	02/28/2015	1	
	Caterer needed	Simpleview	Meal	12/17/2014	12/23/2014	12/23/2014	50	
	Trolley Service Needed	Simpleview	Transportation Request	02/08/2010	12/09/2014	12/09/2014	200	

By clicking the OPPORTUNITIES icon and selecting Service Requests, you can view non-room night specific leads sent to your property. These requests can range from transportation to catering to attraction tours, etc...

Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about a service request or click the name of the request.



Opportunities – Service Requests (cont'd)


REPORTS

RETURN

Sections:

[Request Information](#)

[Request Dates](#)

[Accounts/Responses](#)

Attendees250

Deadline05/31/2019

Budget

Location

DescriptionClient needs Meeting Space with Room capacity of 300 seats. Theatre style. Audio/Visual NOT required

Additional Documents

- [puppy-boundaries_header.jpg](#)

Request Dates


Start Date06/19/2019

End Date06/19/2019

Start Time07:30 AM

End Time01:00 PM

Accounts/Responses

Actions	Company	Status	Pursuing?	Comments
	Simpleview	Open	No Response	

When viewing the service request, you can get detailed information in the Request Information section along with RFP attachment downloads. If the Response Due Date has not passed, you are able to add/edit a response by clicking the Pencil icon in the Accounts/Responses section of the service request.



Opportunities – Service Requests (cont'd)

Once clicked, you can tell the CVB if you are pursuing this piece of business by clicking the Yes or No option in the Pursuing section to the right side of the page.

As you scroll down the response page on the right, you have the ability to attach proposals by clicking the Attach File button or click and drag the file from your computer.

Be sure to scroll to the button and click the Update button to save your changes!

The screenshot shows a web form titled "Response for Simpleview" with a close button (X) in the top right corner. The form contains the following sections:

- Pursuing:** Marked as "Required" with a red arrow pointing to it. It has two radio button options: ☐ YES and ☐ NO.
- Comments:** Marked as "Required". It features a large text input area.
- Bureau-Only Comments:** A sub-section with the text: "These comments will not be seen by the client. They will only be seen by bureau staff." Below this is another text input area.
- File Attachment:** Includes a blue button labeled "ATTACH A FILE" with a red arrow pointing to it, and a light gray box below it stating "No files have been attached".
- Footer:** Contains two buttons: a blue "UPDATE" button with a red arrow pointing to it, and a white "CANCEL" button.

