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!

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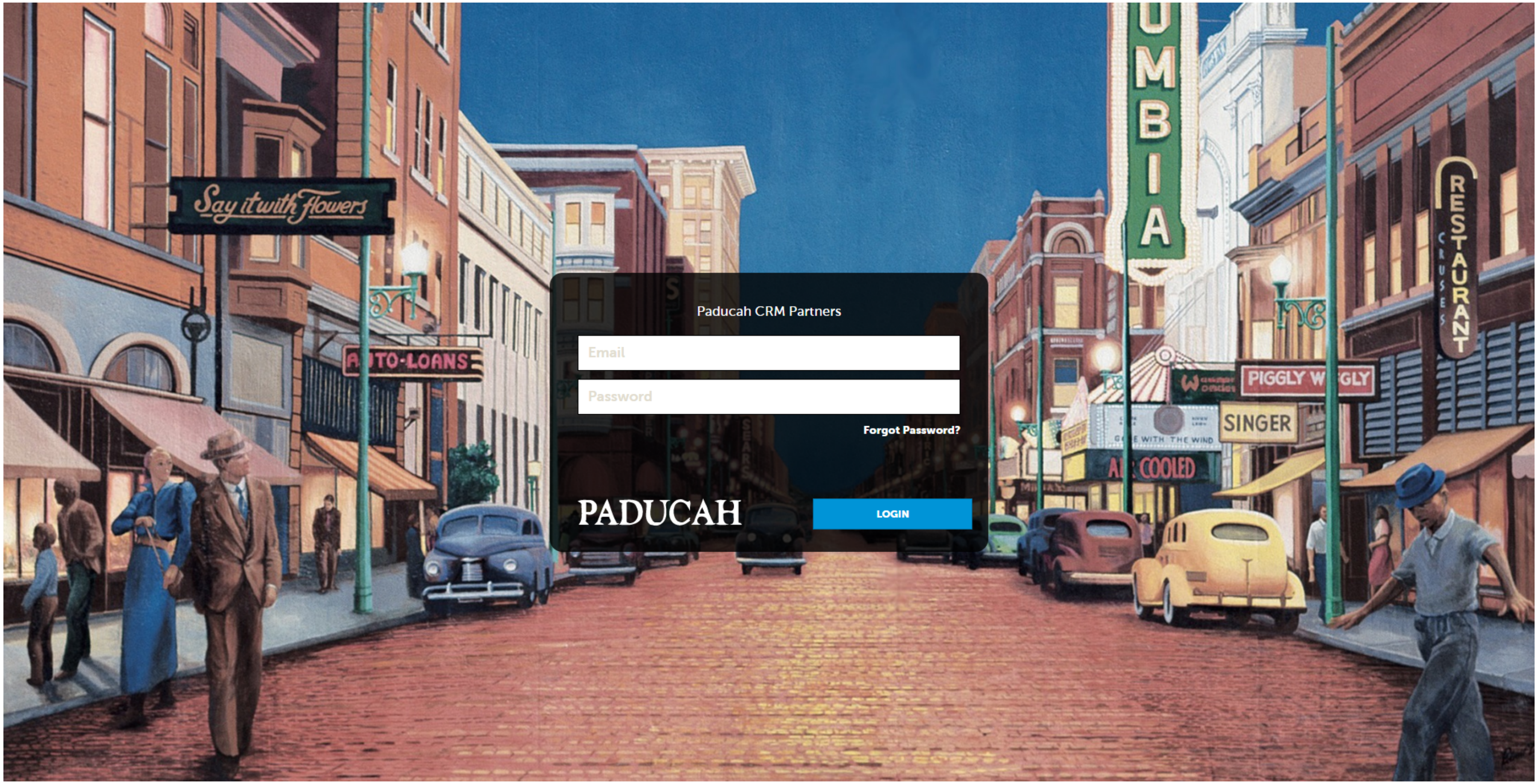
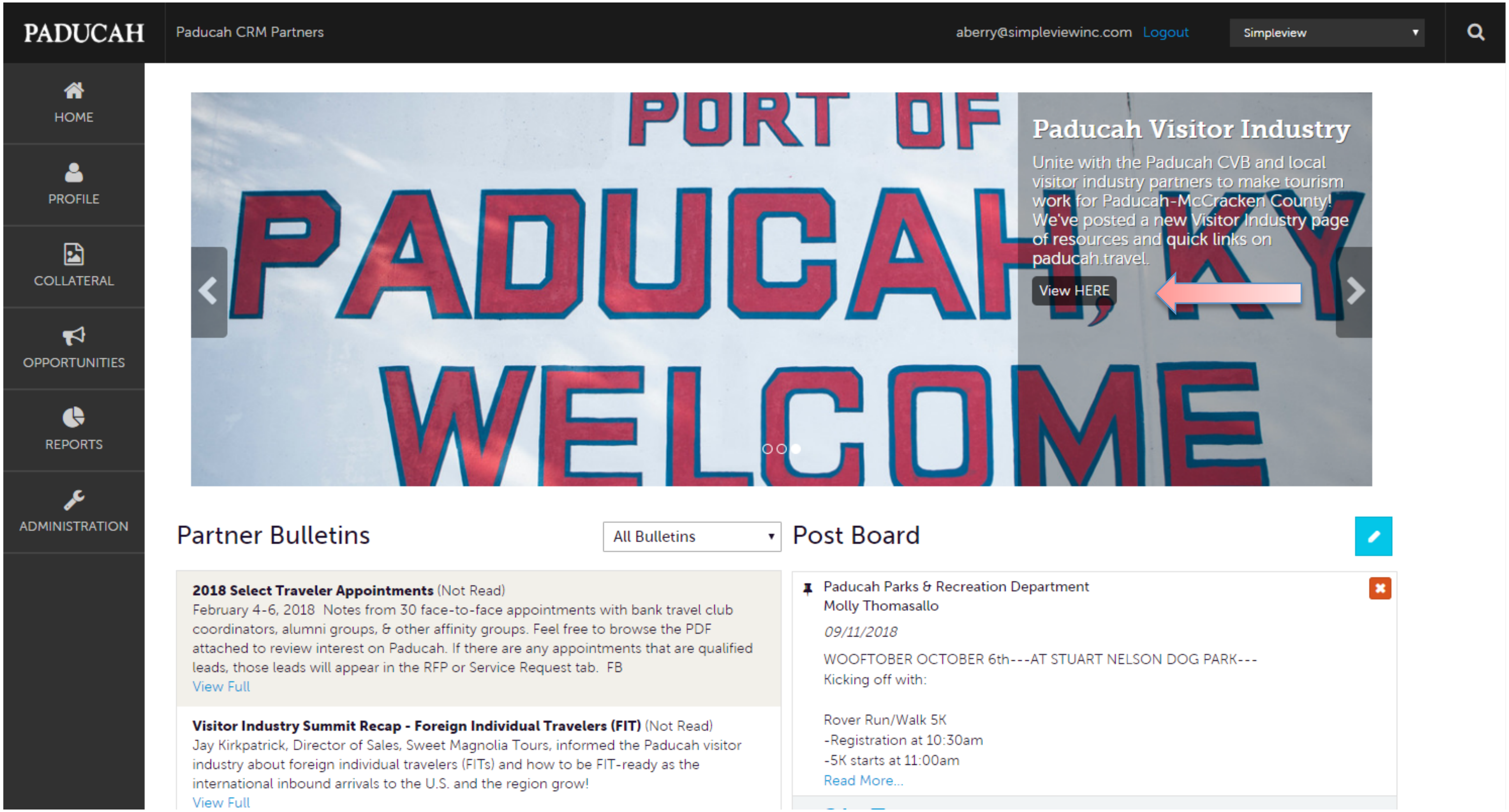
Paducah Partner Portal LOGIN Screen



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

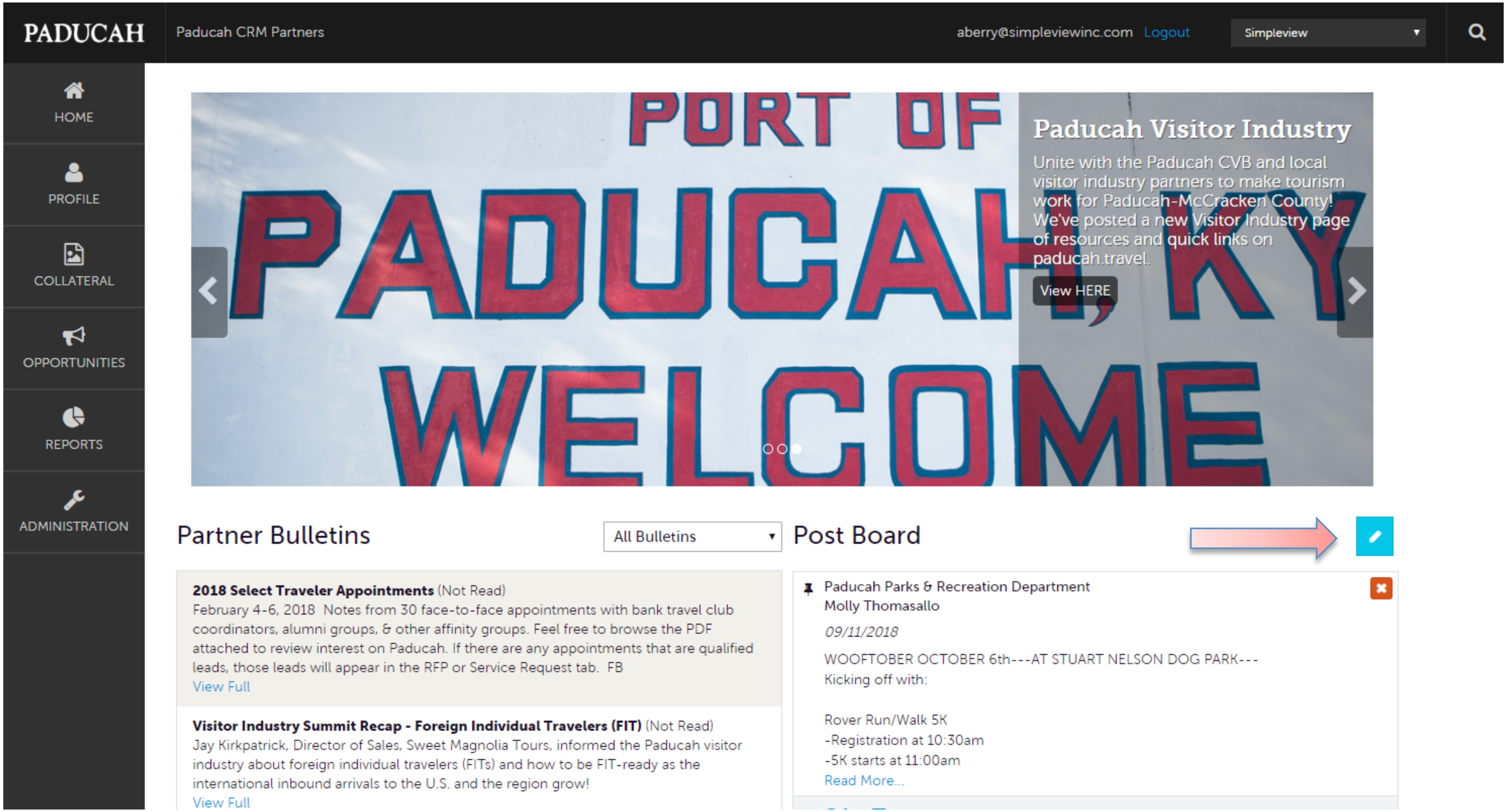
__**IMPORTANT NOTE:**__ If you forgot your login or password, the Paducah CVB can assist! Contact the CVB to set up a new user login or recover a forgotten password.

Home Screen



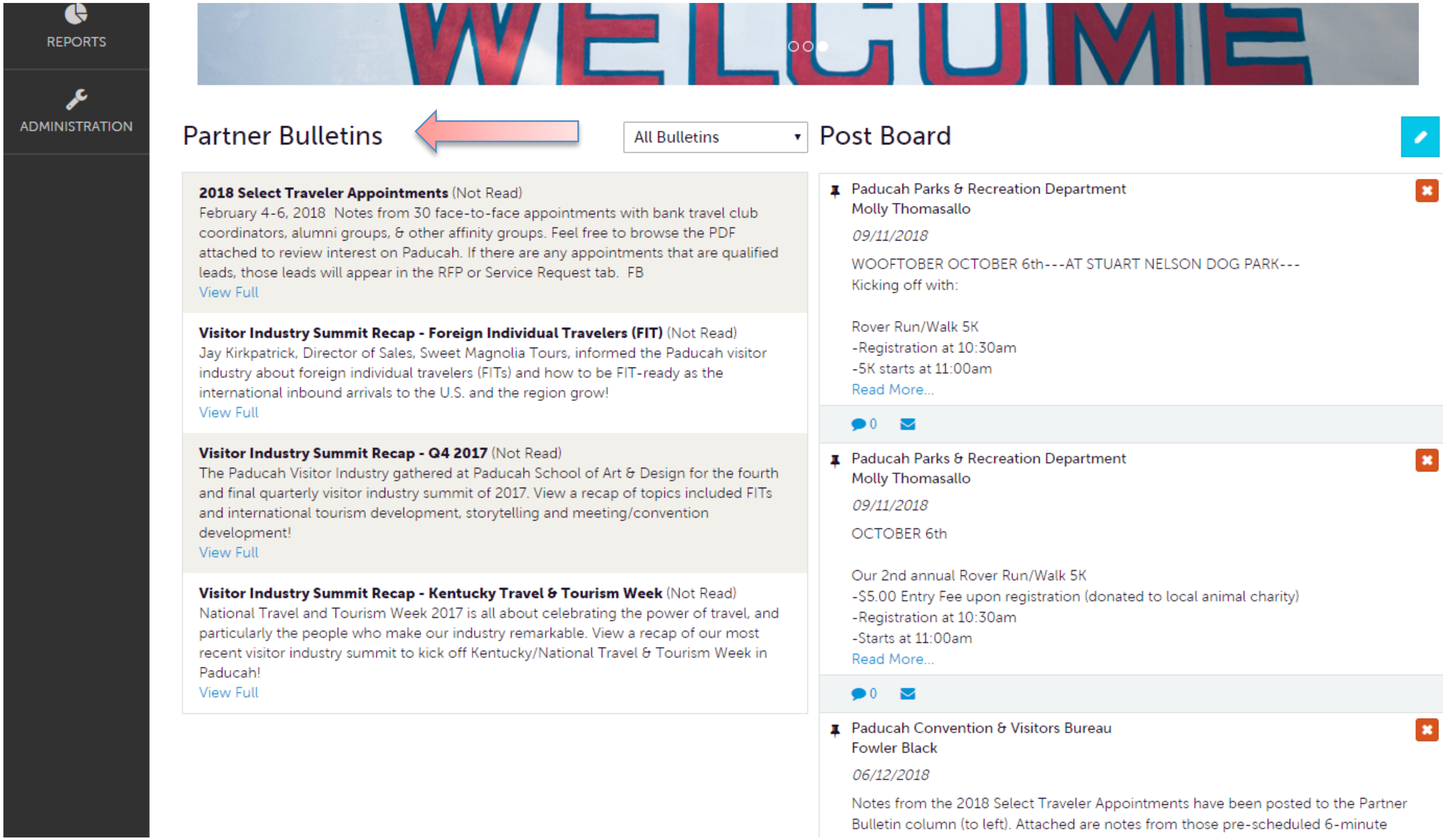
The **image carousel** displays selected images from your destination and may provide links the Paducah Visitors Bureau would like you to follow within the portal, to resources on Paducah.travel or to another website.

Home Screen (cont'd)



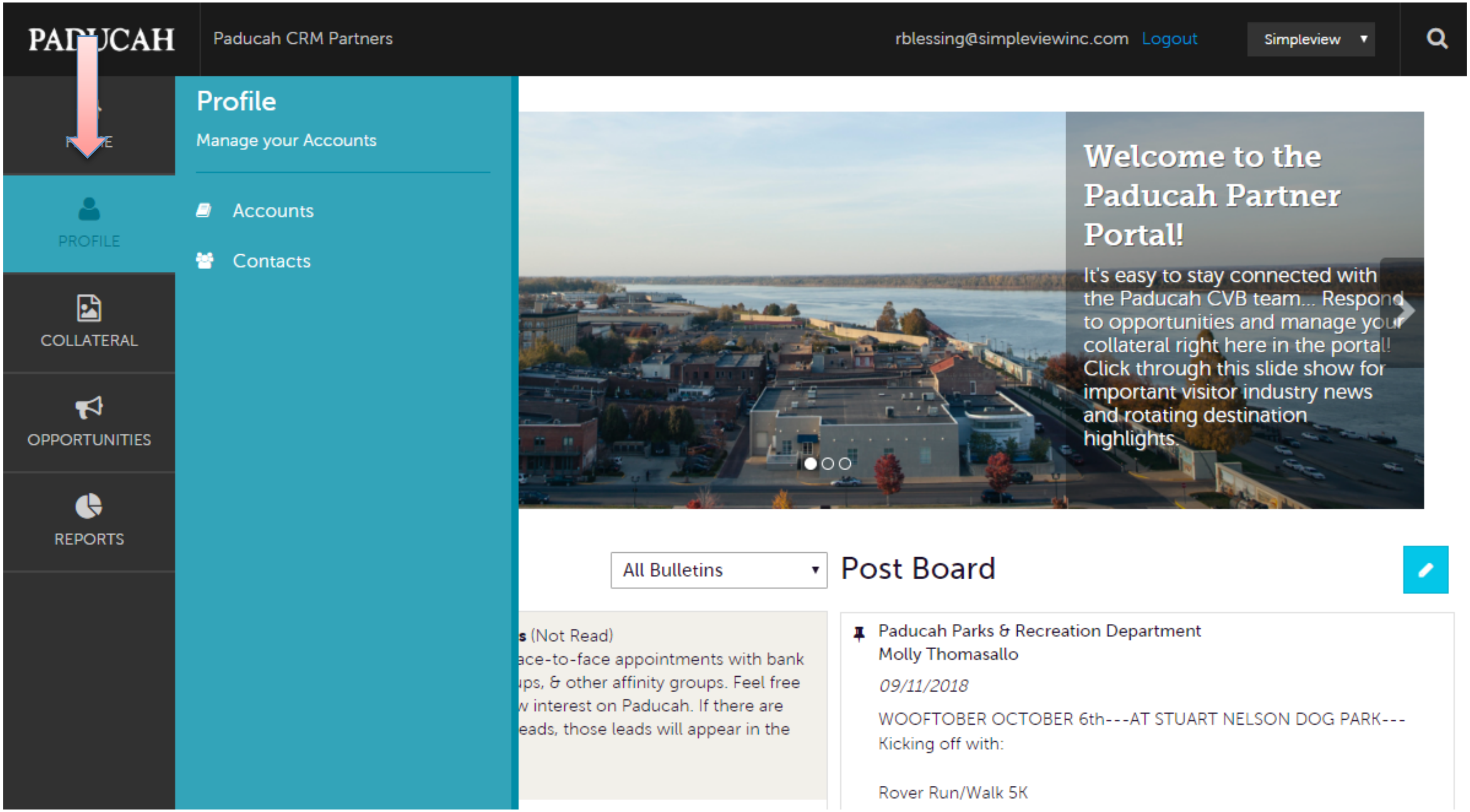
Post Board allows you to communicate with other visitor industry partners in the destination. By clicking on the caption bubble icon, you can reply to a post. You can also email the poster by clicking the mail icon.

Home Screen (cont'd)



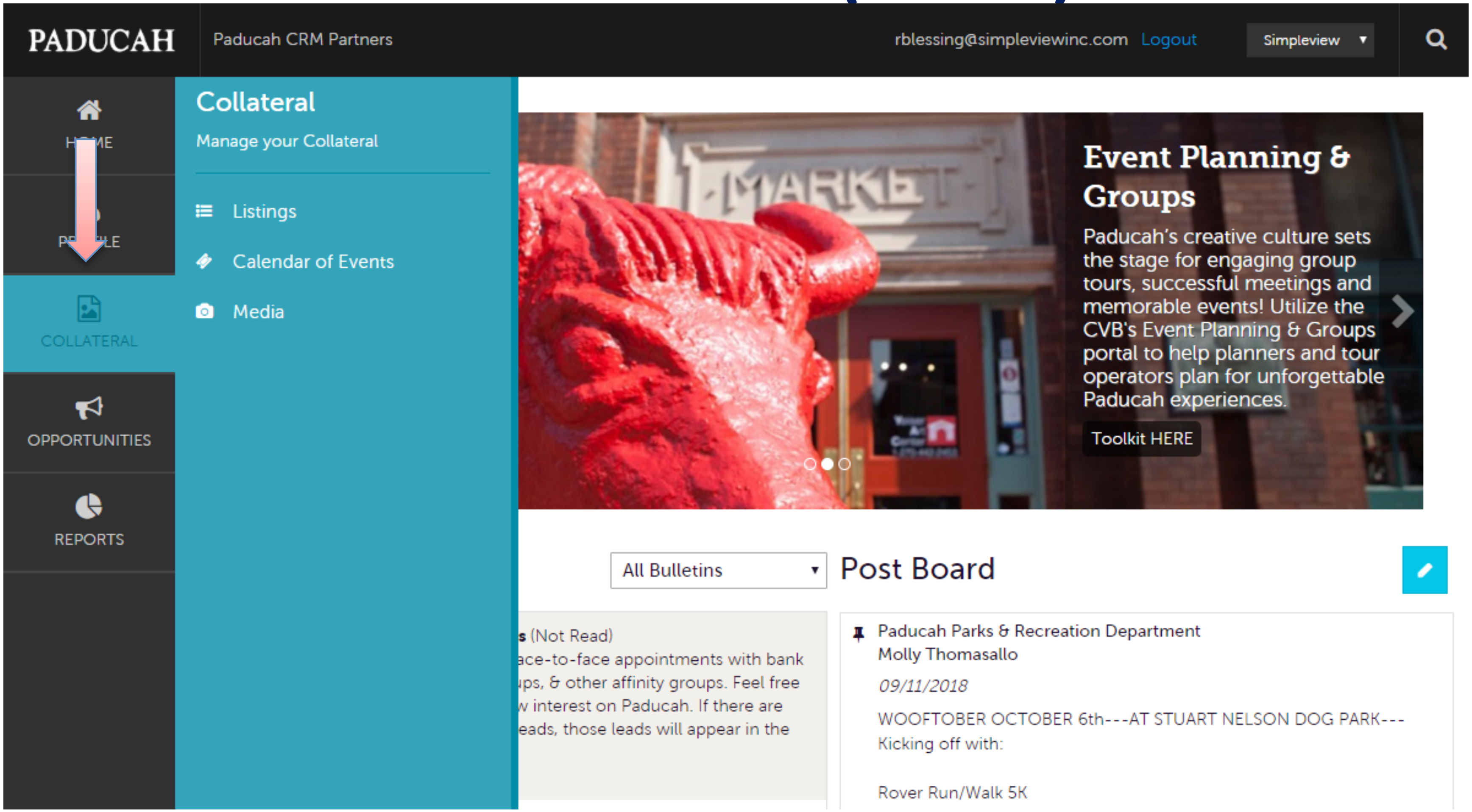
Partner Bulletins are important notices, visitor industry summit documentation, events, etc… Extra important bulletins will be marked with a blue and white exclamation mark!

Home Screen (cont'd)



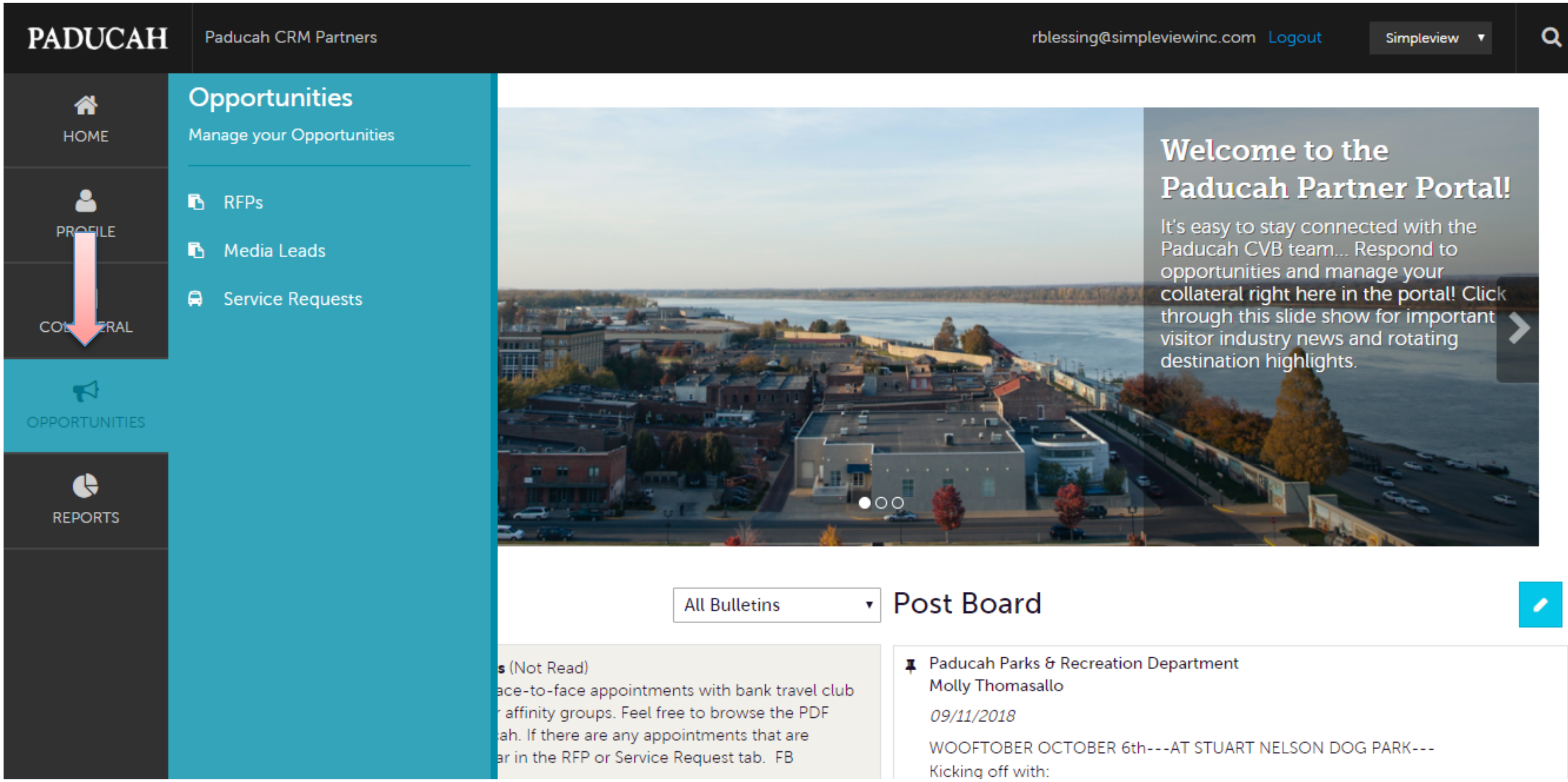
By clicking the **PROFILE** icon, you can view/edit your property's information and contacts associated with your property. More on these options later in the presentation.

Home Screen (cont'd)



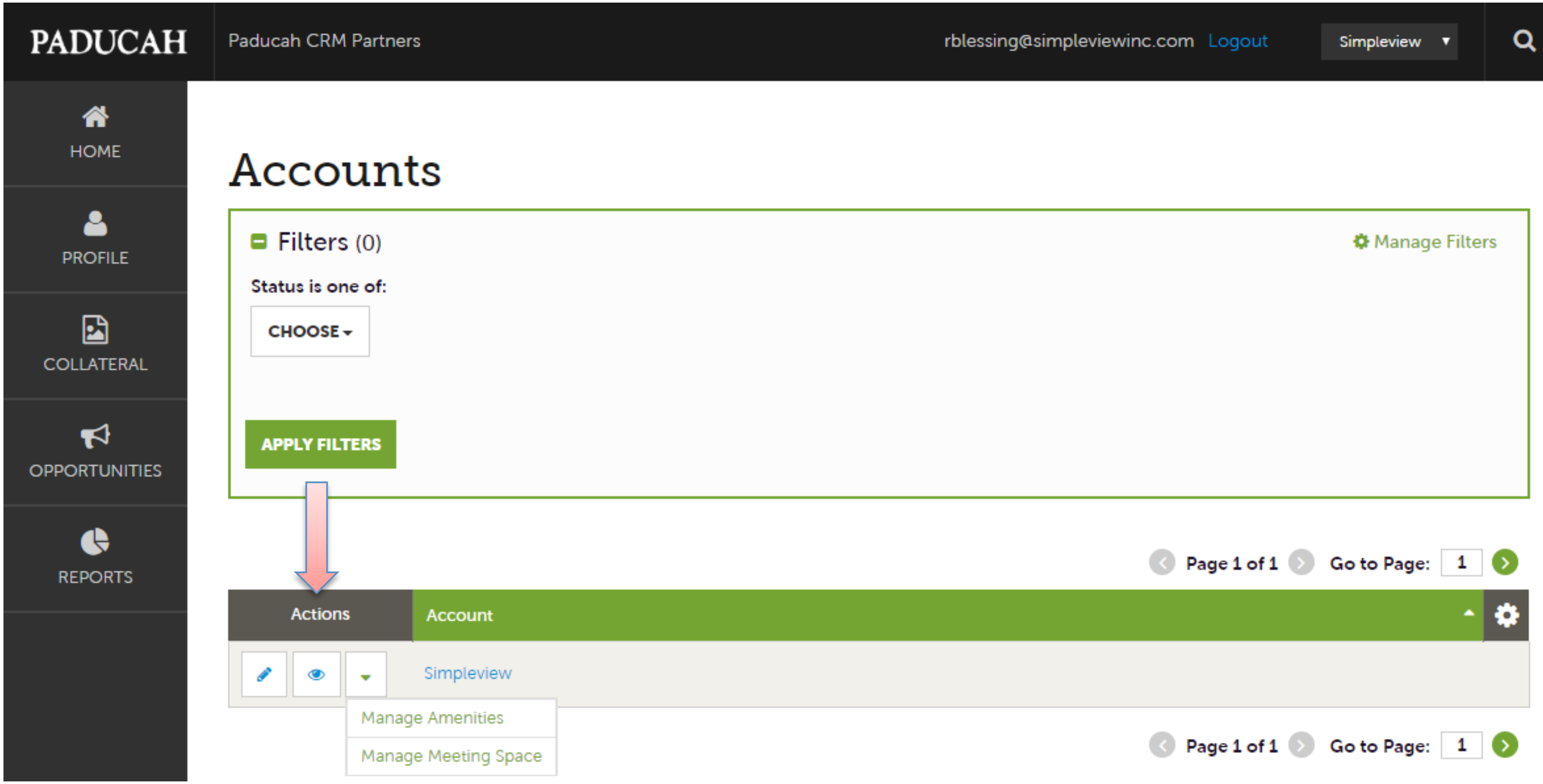
By clicking the **COLLATERAL** icon, you can view your property's listing(s) on Paducah.travel, events listed in the Paducah.travel Calendar of Events and media (i.e. images). More on these options later in the presentation.

Home Screen (cont'd)



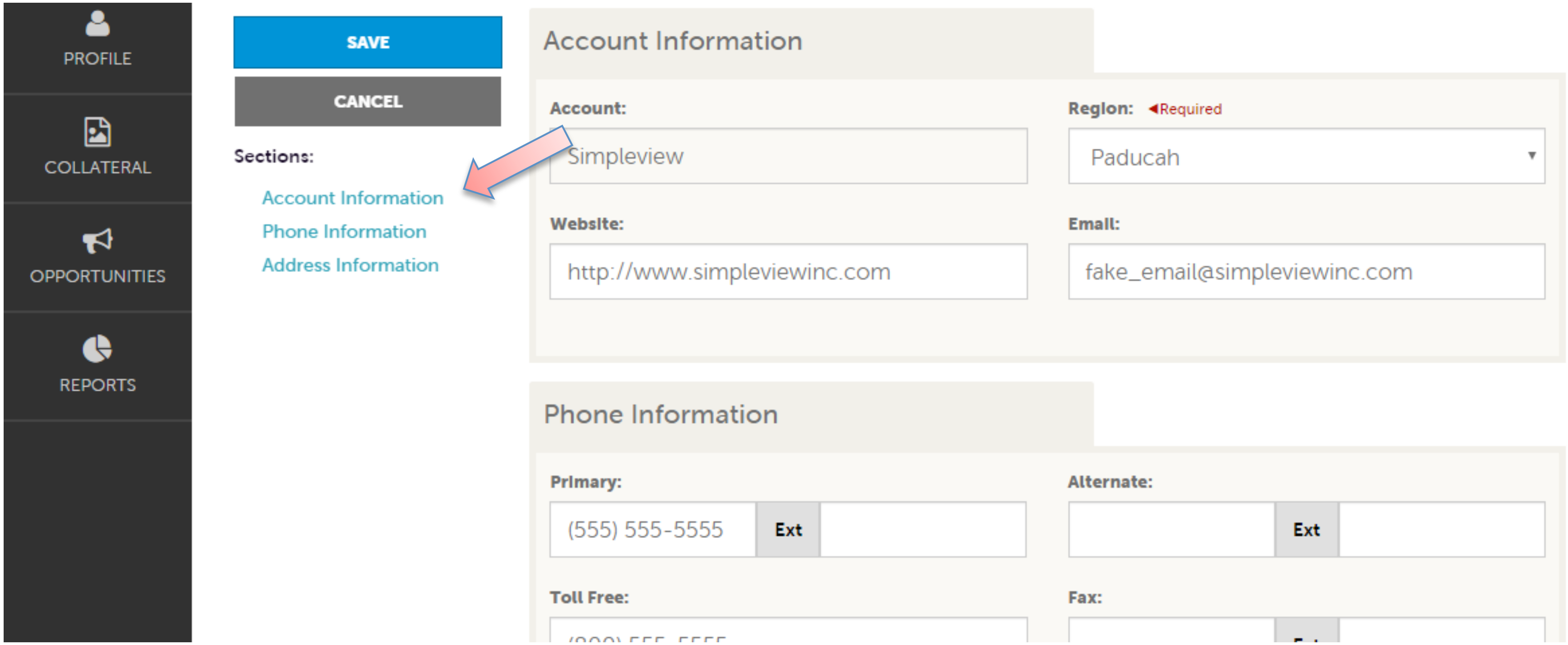
By clicking the **OPPORTUNITIES** icon, you can view and respond to RFPs sent to you by the CVB. Opportunities are broken in RFPs (meeting and tour leads), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs). More on these options later in the presentation.

Manage Profile - Accounts



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.

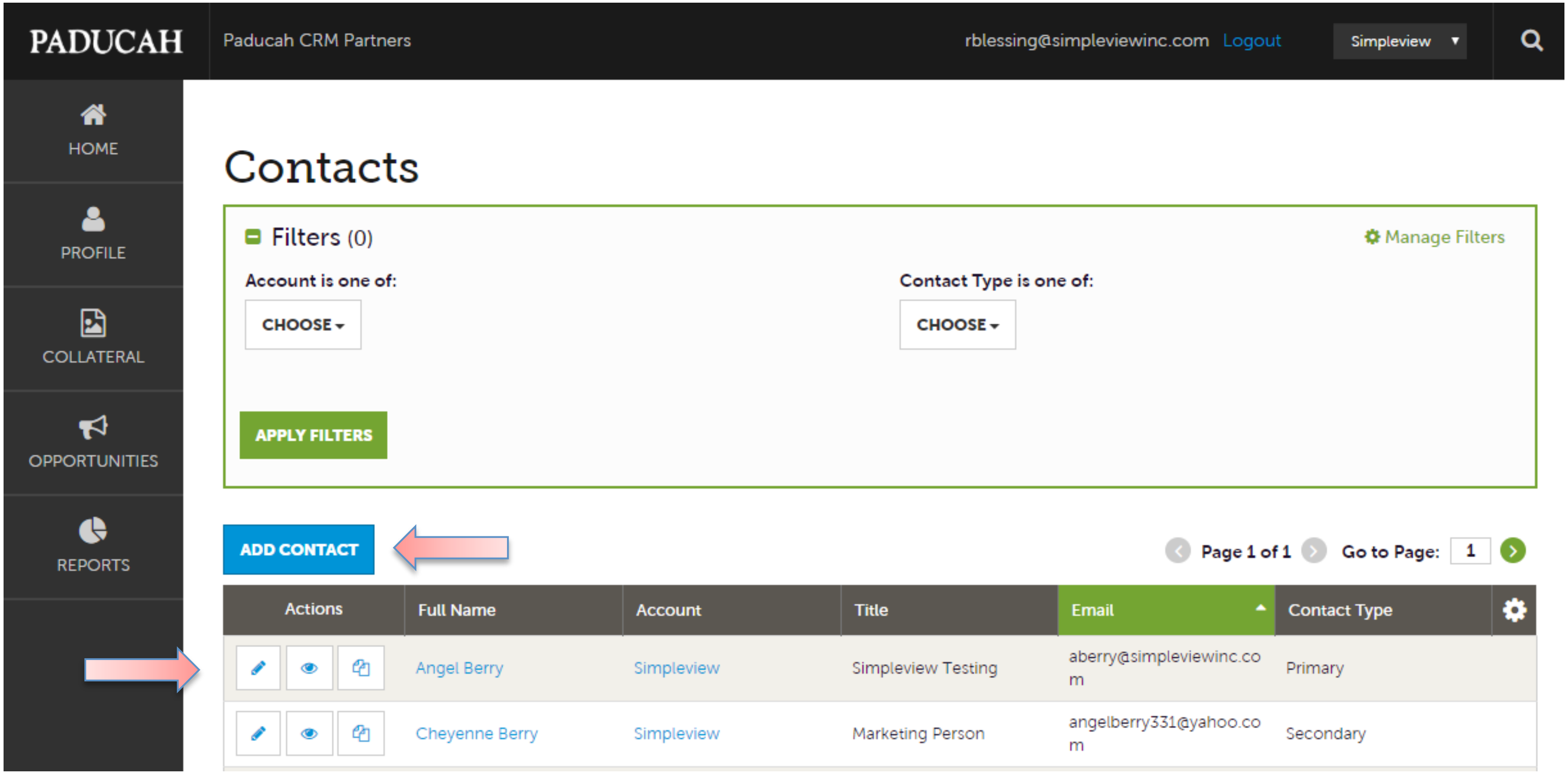
Manage Profile - Accounts (cont'd)



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.

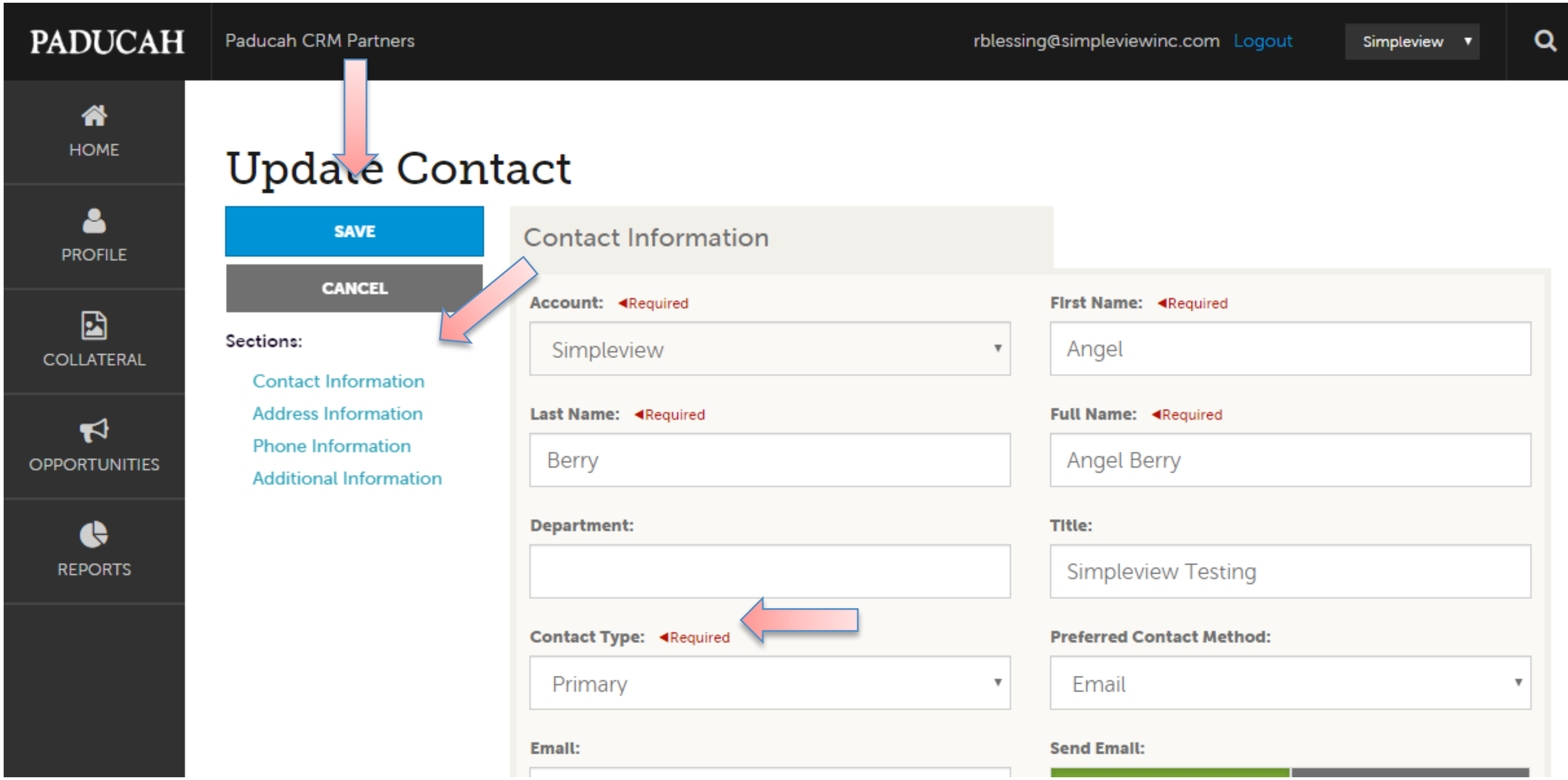
If you are viewing the account, the button in the top left will say Edit. If you are editing the account, the top left button will say Save. You *must* click the Save button before any of your changes are actually saved!

Manage Profile - Contacts



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.

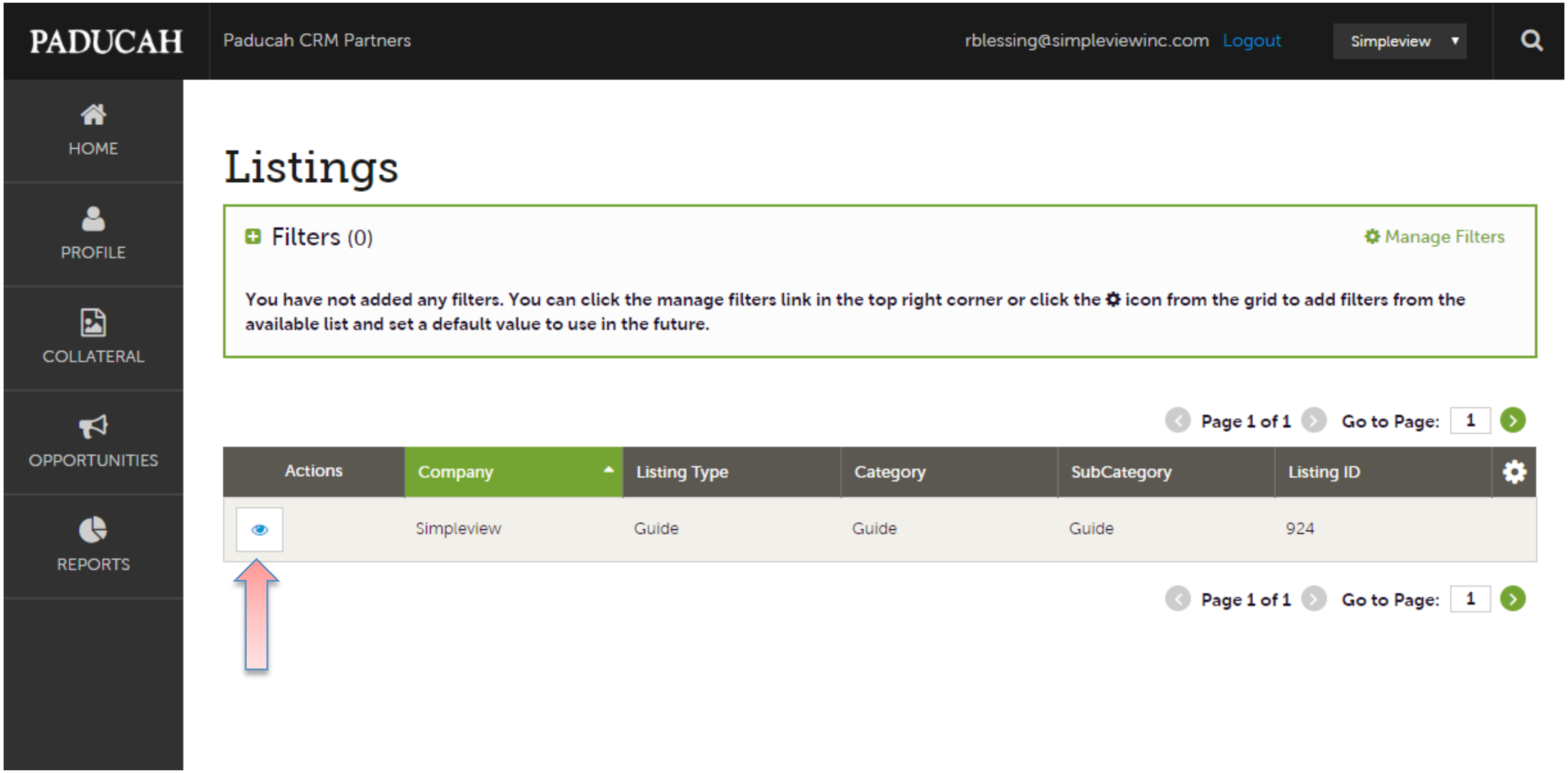
Manage Profile - Contacts (cont'd)



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!

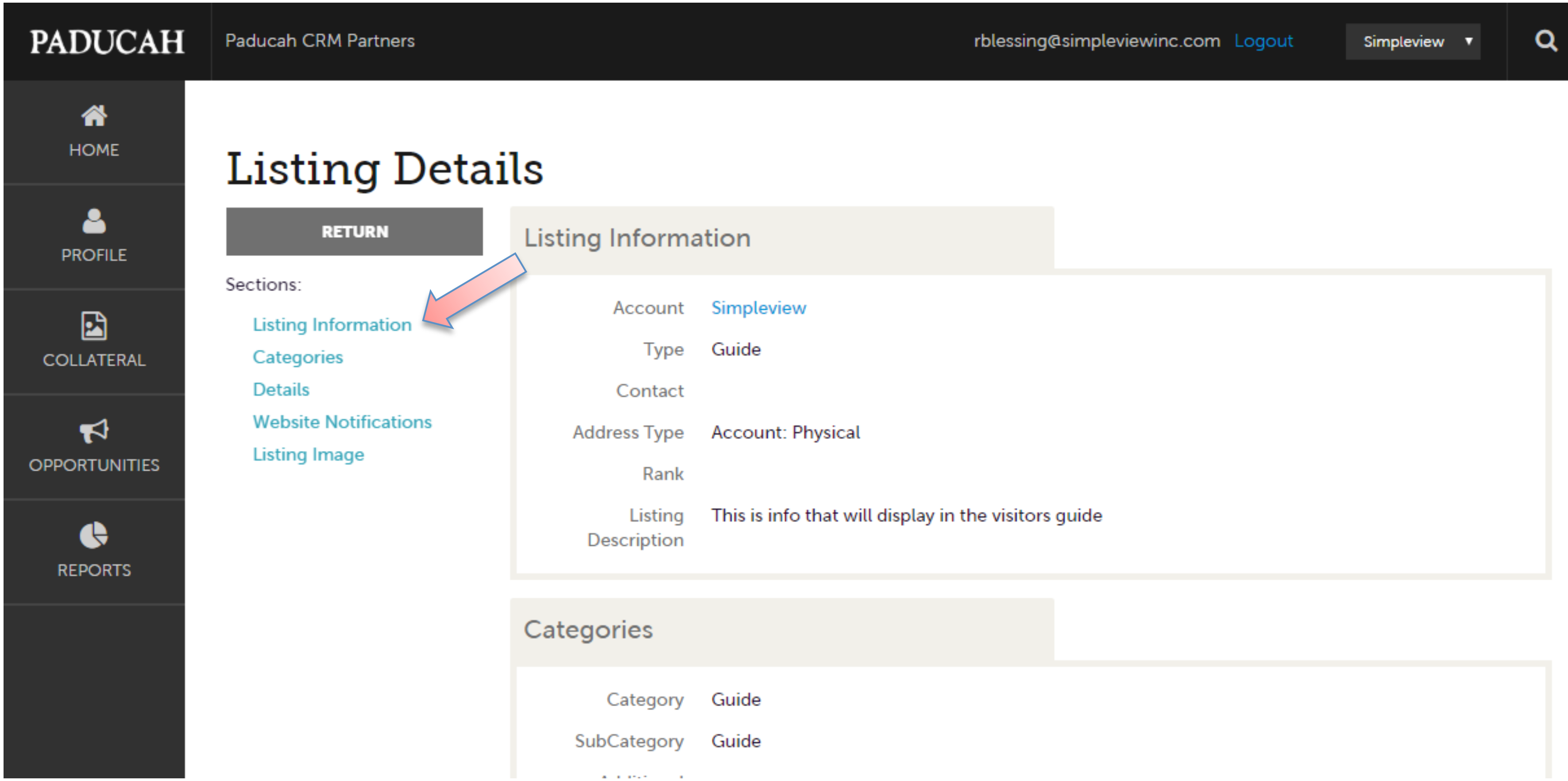
IMPORTANT NOTE: If a contact has left your property it is your responsibility to notify the bureau and/or change their contact type to "Inactive".

Collateral - Listings



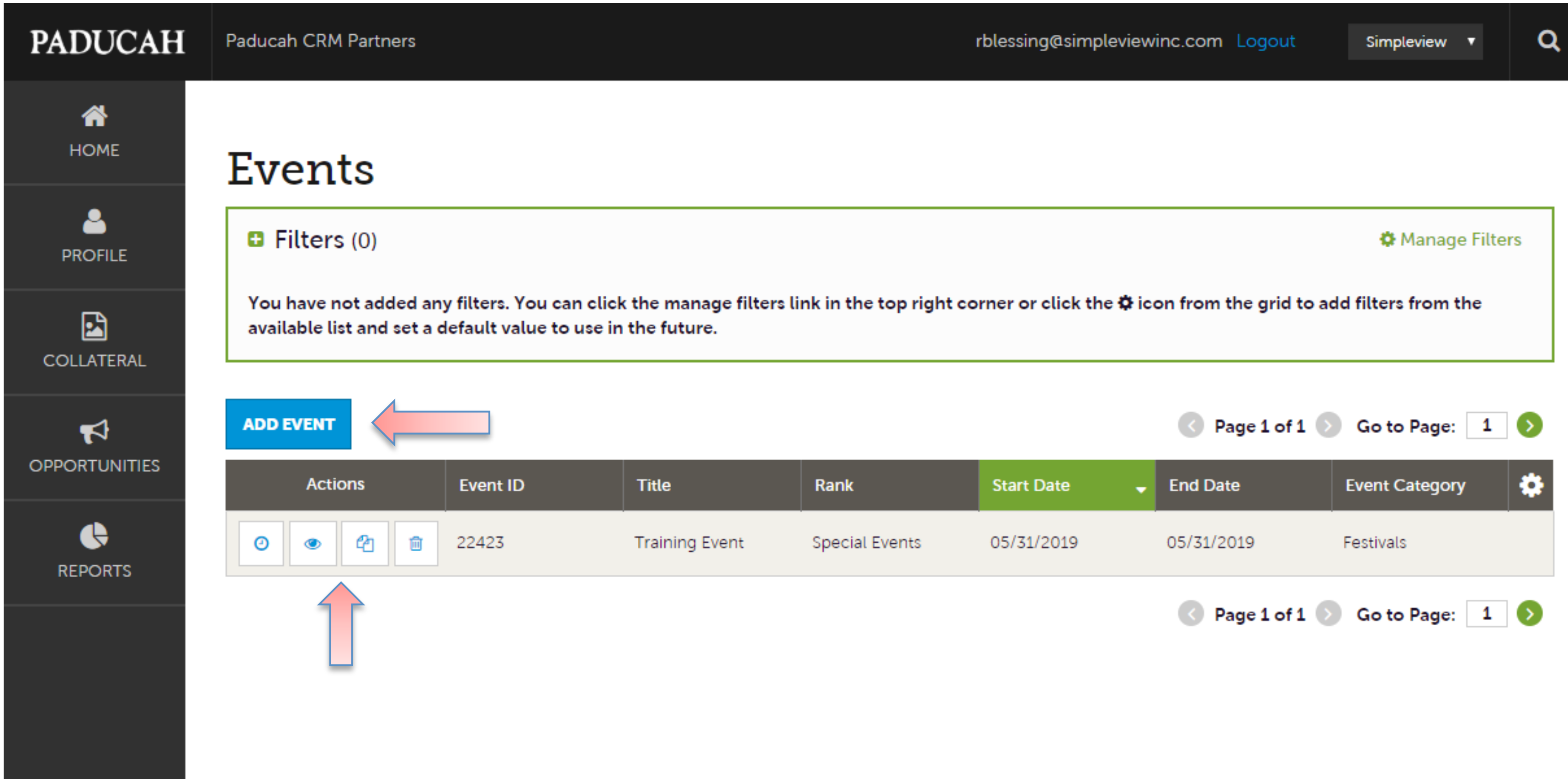
After you click the **COLLATERAL** icon and then Listings, you will be presented with your property's listings. These listings may be website listings or print guide listings. By clicking the eyeball icon, you can view your listing information.

Collateral – Listings (cont'd)



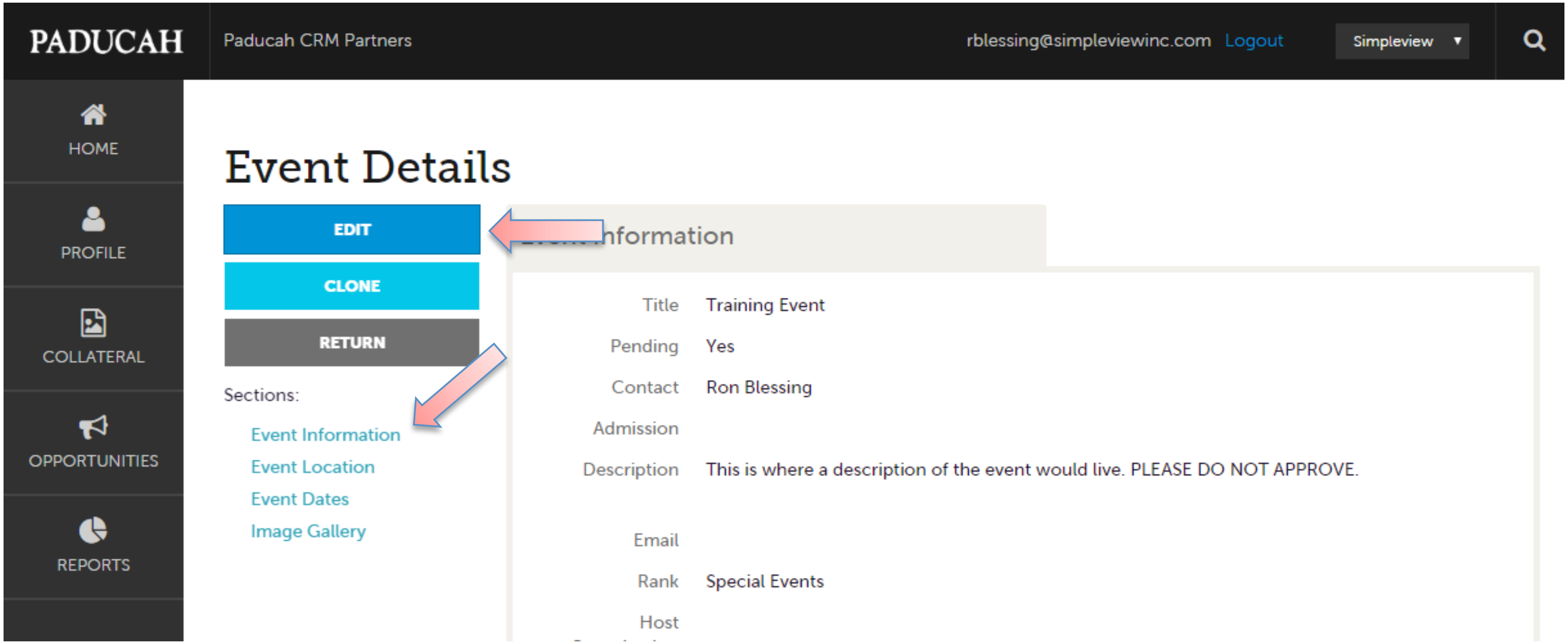
When you view a listing, you can quickly scroll to a section on the page by clicking the links onthe left of the page.

Collateral – Calendar of Events



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.

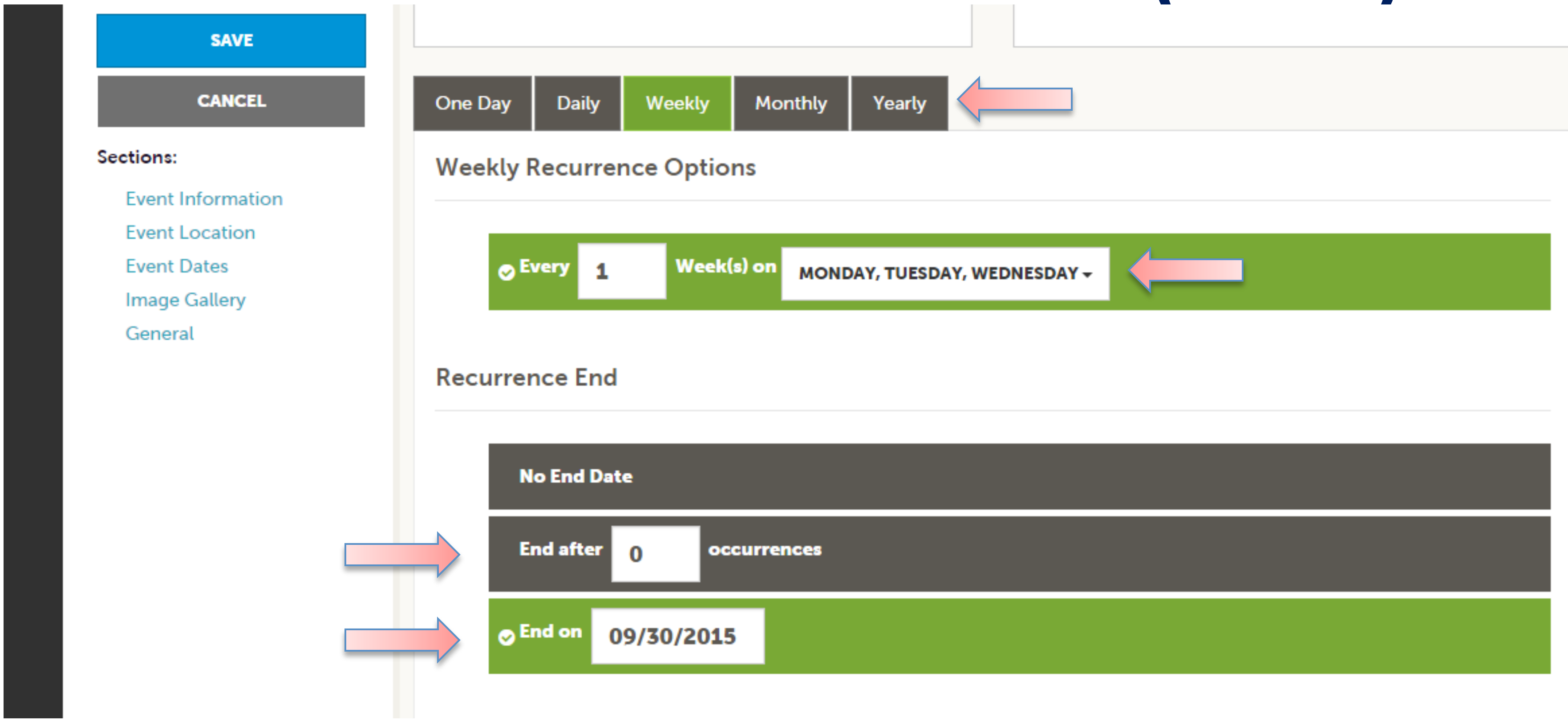
Collateral –Calendar of Events (cont'd)



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!

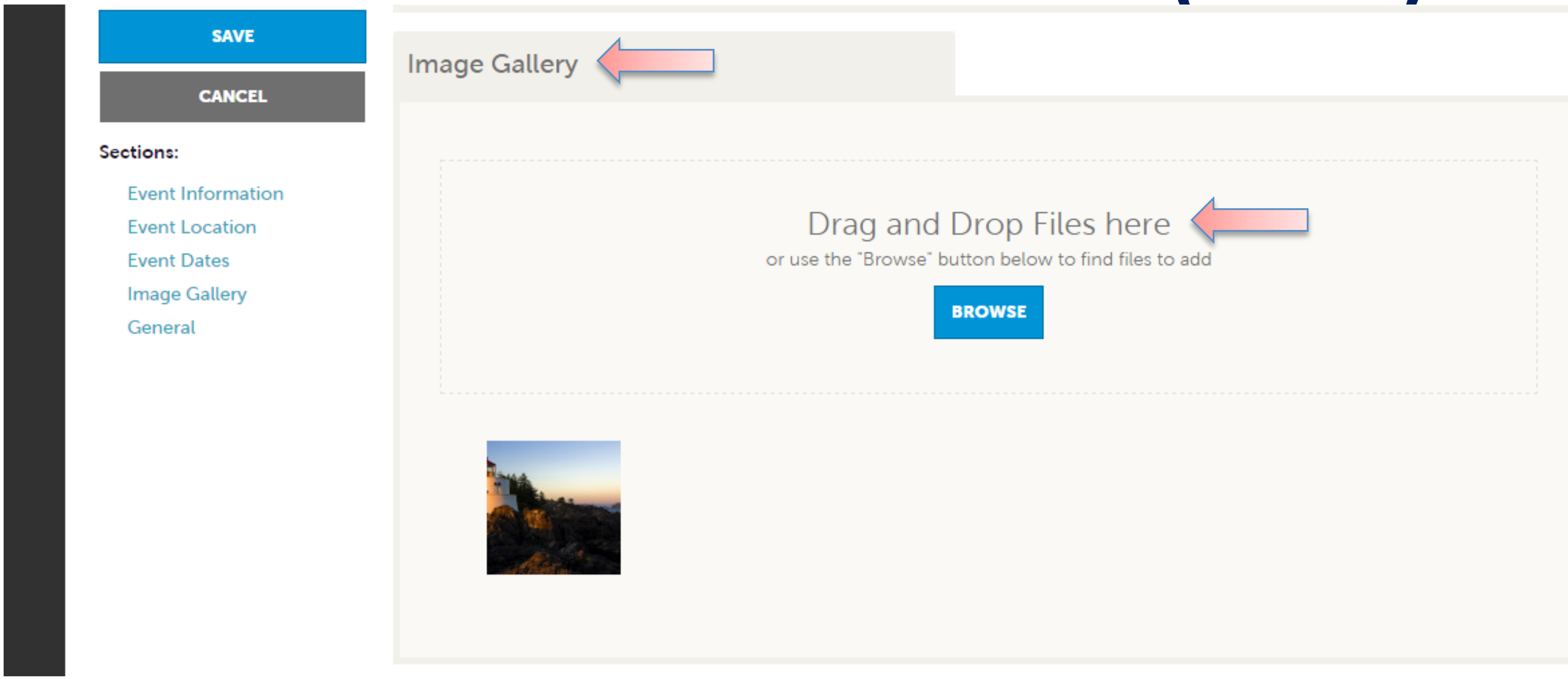
<u>IMPORTANT NOTE:</u> Any edits or additions of events will require approval from the CVB. Upon saving your updates, the CVB will be notified of your changes/adds.

Collateral –Calendar of Events (cont'd)



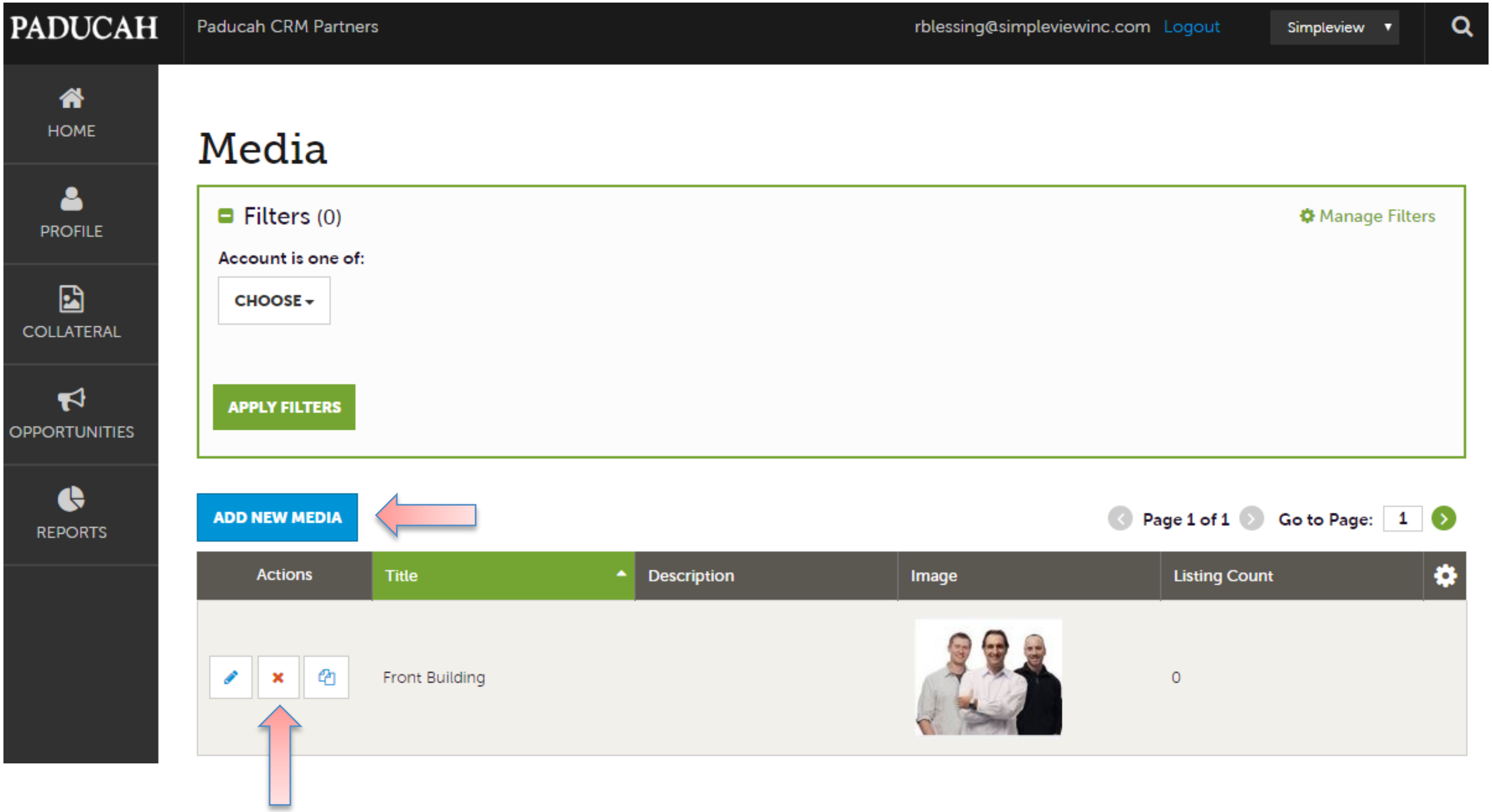
The Calendar of Events has a recurrence model built-in. You can make your event a one time event, daily, weekly, monthly or yearly. If it is not a one day event, you can choose your recurring days of the event. Depending upon if it is daily, weekly, monthly, or yearly, your recurrence may change. At 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)



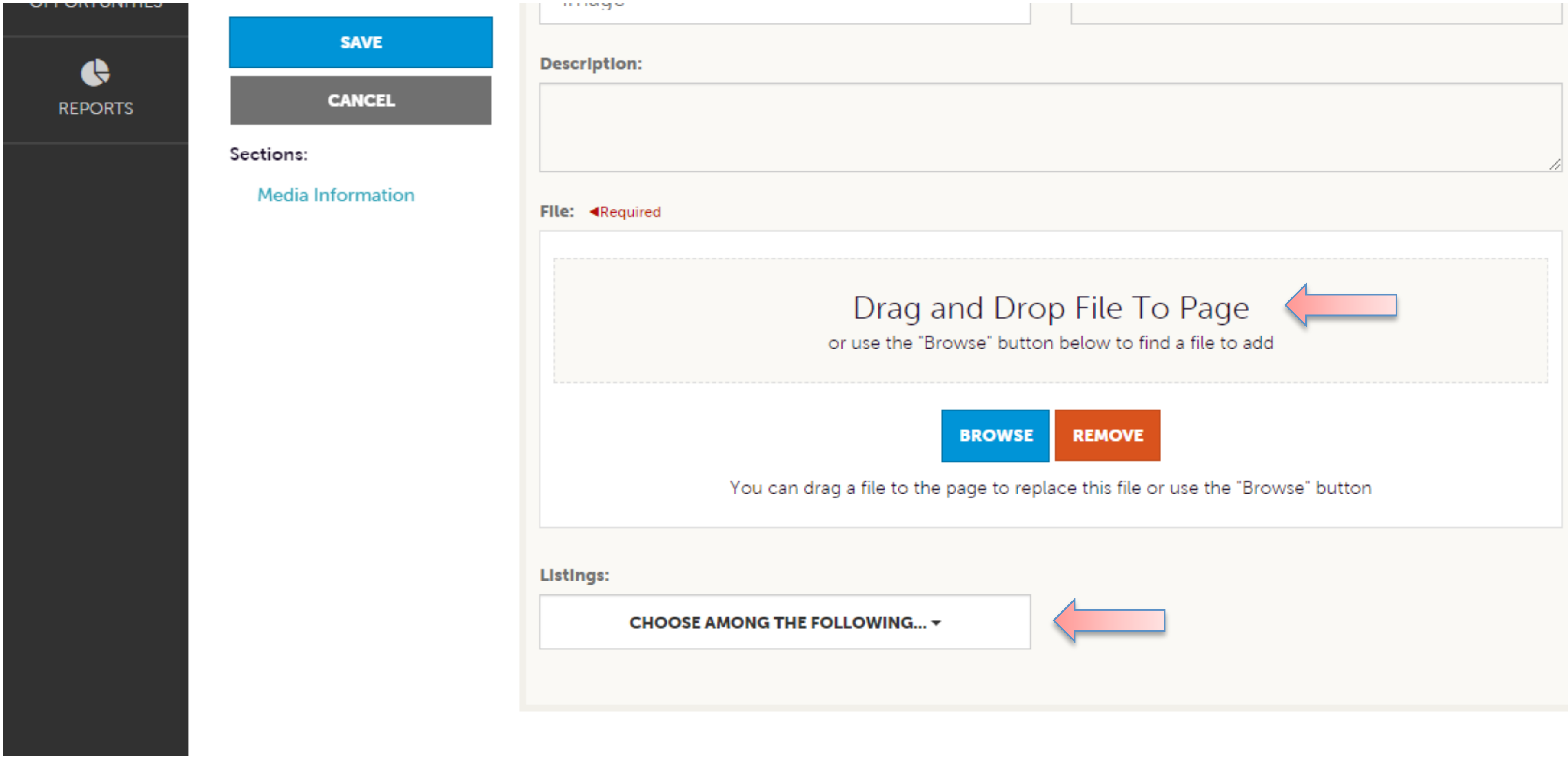
As with Listings, you can add images to your events. Adding images to events is done in a different way. In the Image Gallery section on the event, you can drag and drop and image or click the Browse button to search your computer for an image.

Collateral – Media



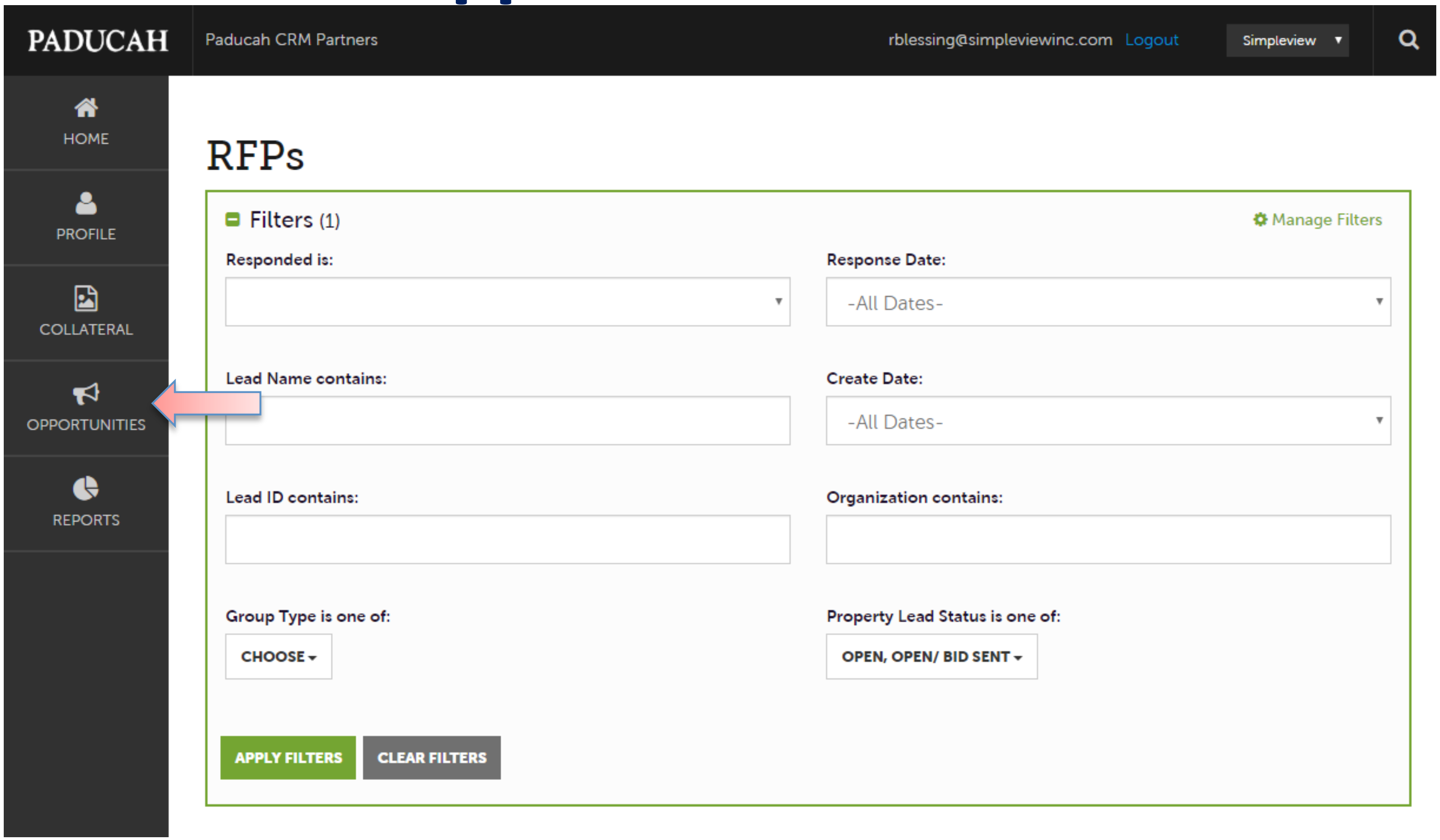
After you click the COLLATERAL icon and then Media, you will be presented with your property(s) images available for listings. The pencil icon will allow you to edit an existing image. By clicking the red “X” icon, you can delete an existing image. The clone icon will allow you to duplicate an image.

Collateral – Media (cont'd)



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



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.

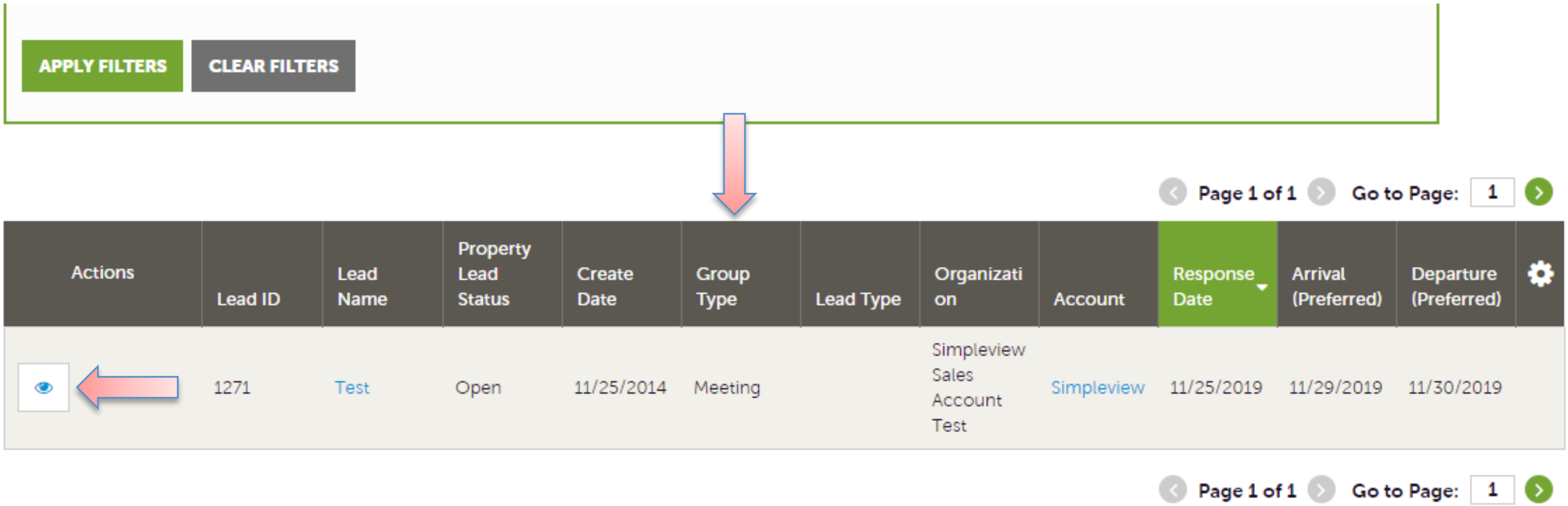
7. Closed Cancelled: These are leads you won the business but the group has cancelled.

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.

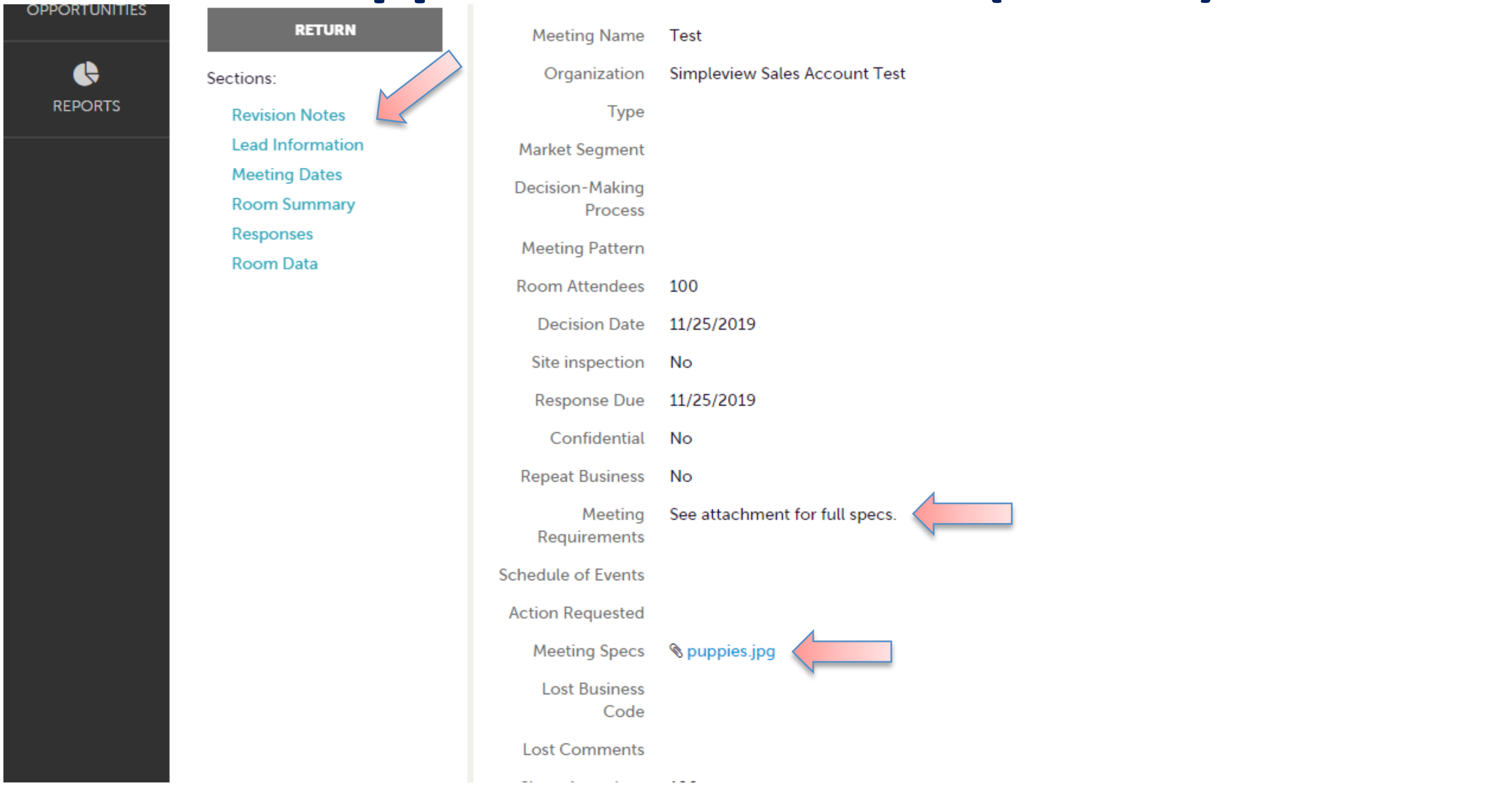
Opportunities – RFPs (cont'd)



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.

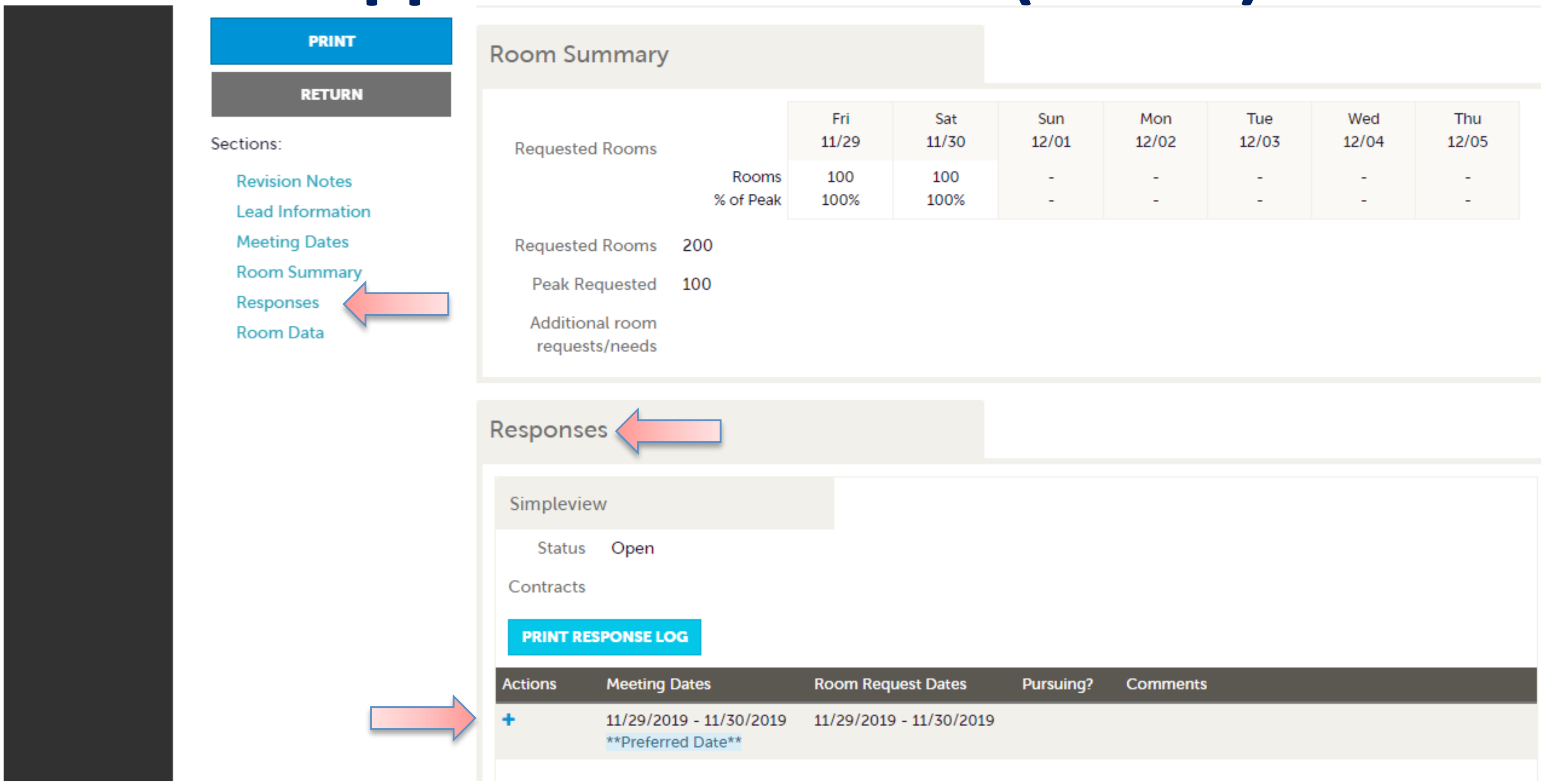
To view the lead, click on the Eyeball icon or the Lead Name.

Opportunities – RFPs (cont'd)



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.

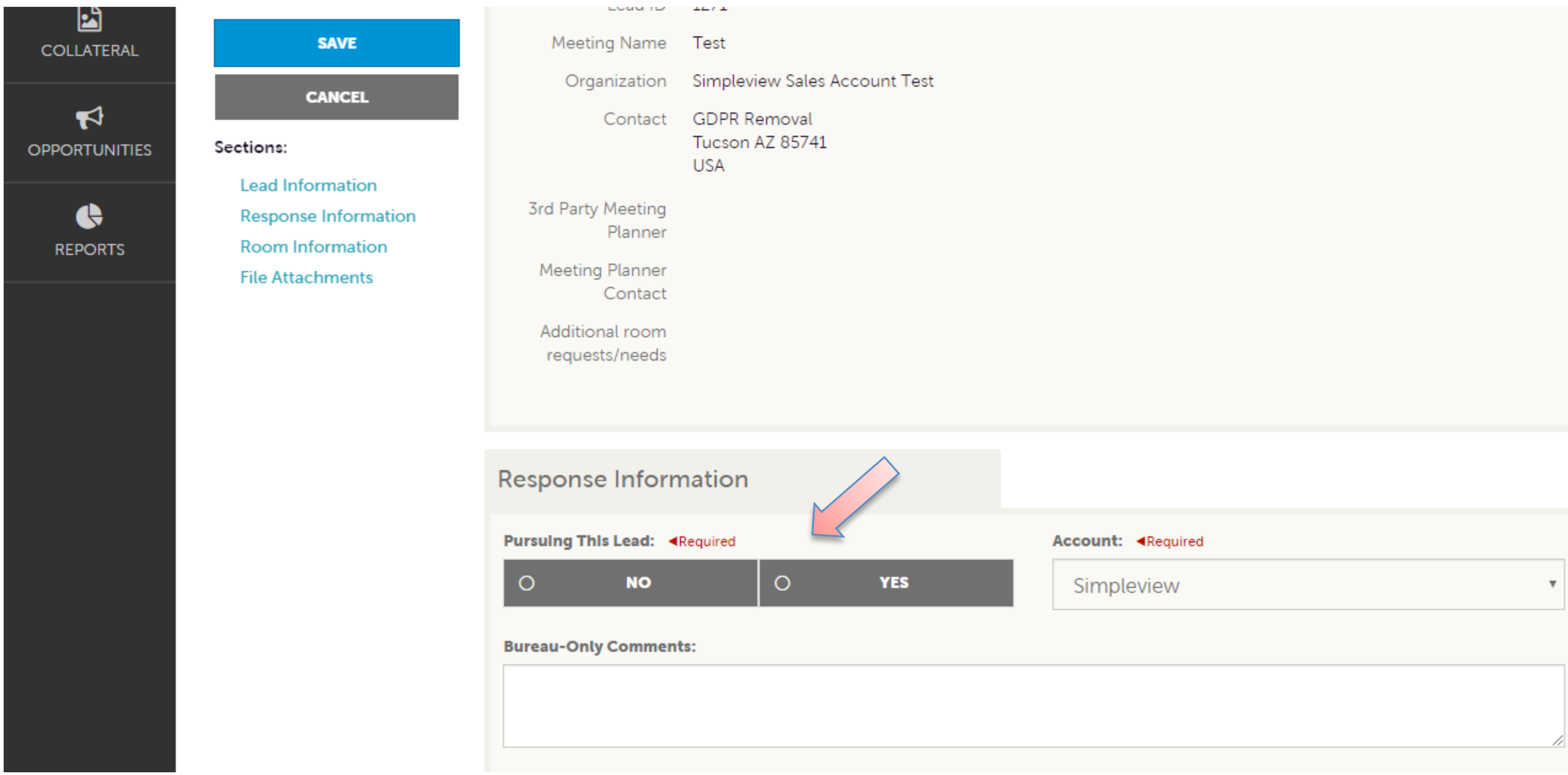
Opportunities – RFPs (cont'd)



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

<u>IMPORTANT NOTE:</u> 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)



When editing your response, you will need to tell the CVBif you are pursuing the business by selecting Yes or No to the Pursuing this lead option

Opportunities – RFPs (cont'd)

SAVE

CANCEL

Sections:

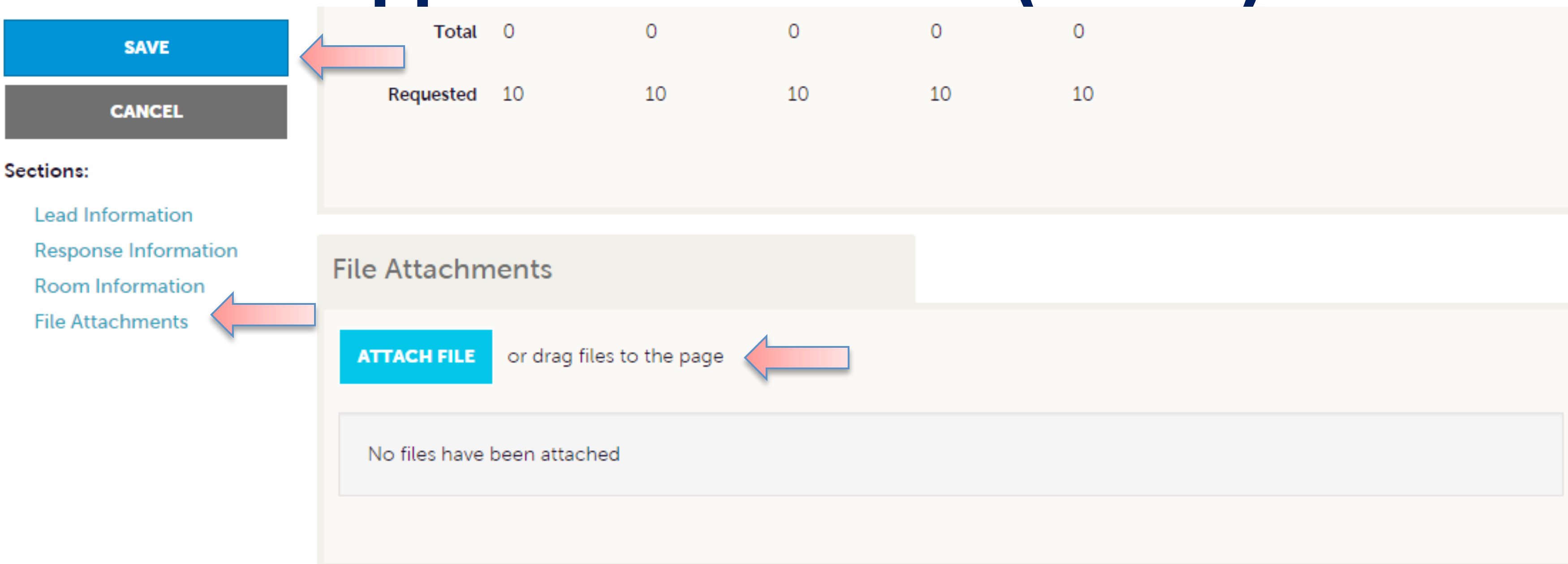
- Lead Information
- Response Information
- Room Information
- File Attachments

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.

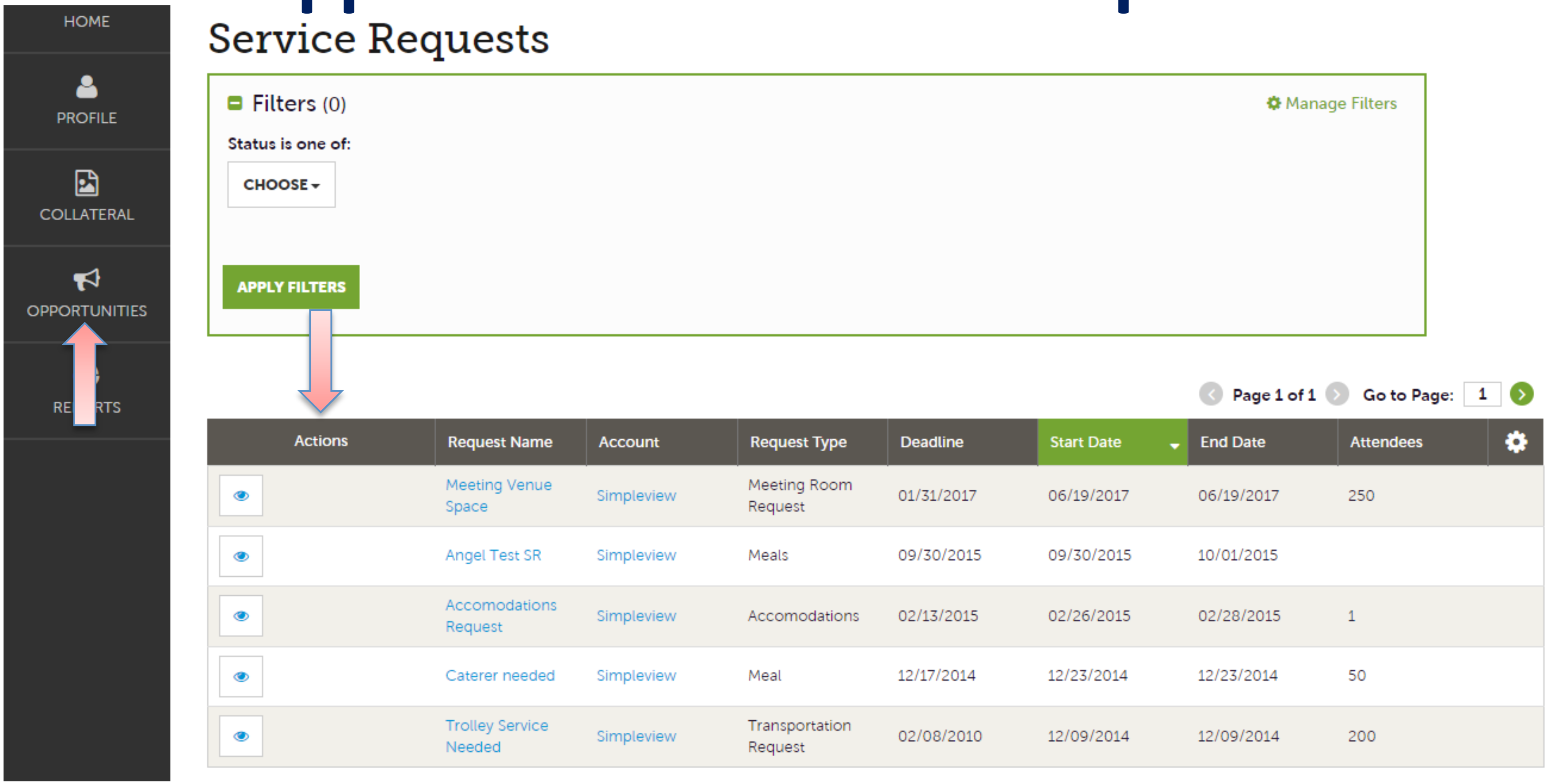
Opportunities – RFPs (cont'd)



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

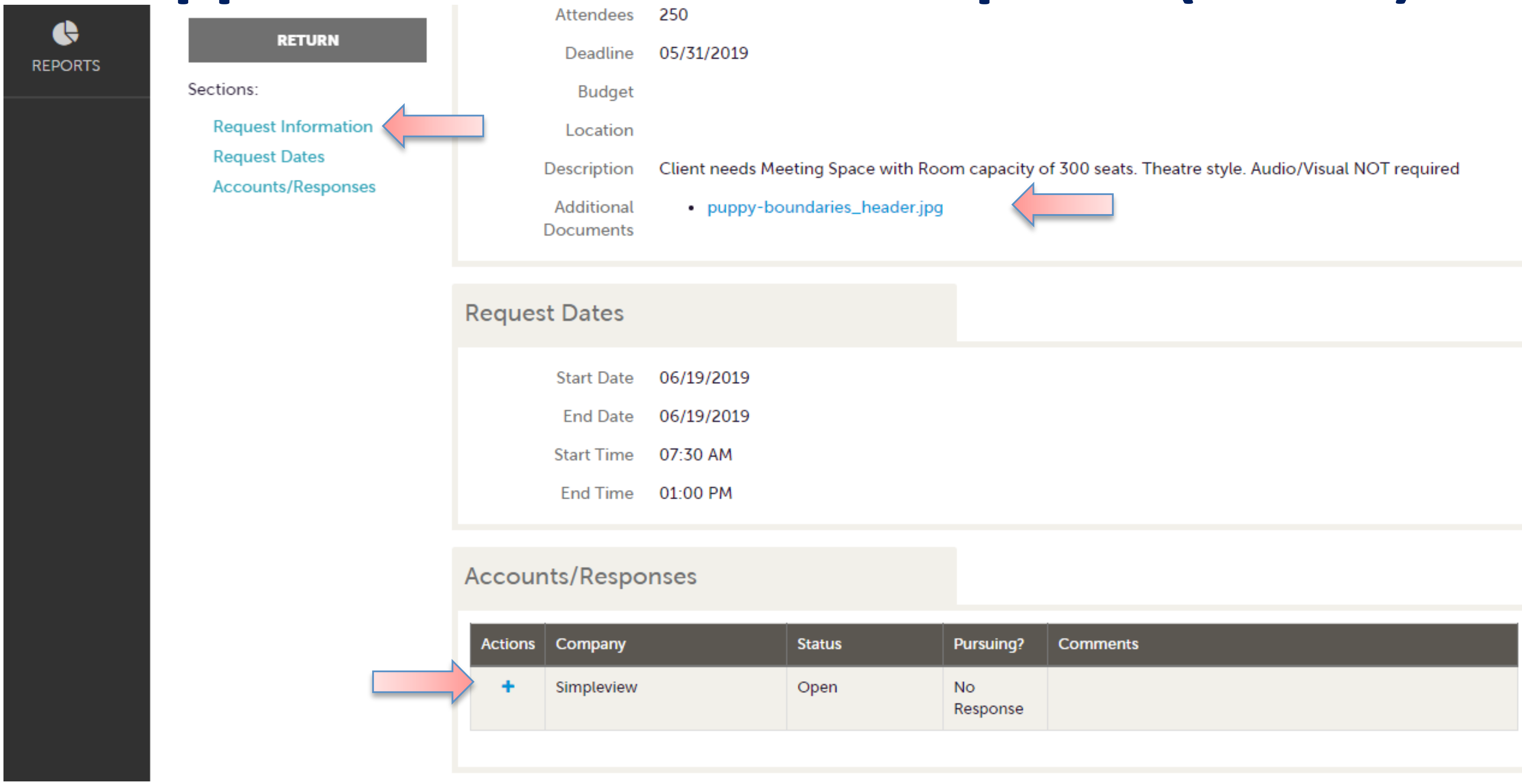


Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees
	Meeting Venue Space	Simpleview	Meeting Room Request	01/31/2017	06/19/2017	06/19/2017	250
	Angel Test SR	Simpleview	Meals	09/30/2015	09/30/2015	10/01/2015	
	Accomodations Request	Simpleview	Accomodations	02/13/2015	02/26/2015	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)



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!