



Convention & Visitors Bureau

Partner Extranet User's Guide

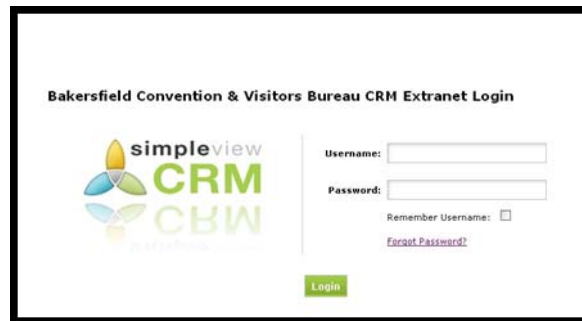
Updated 12/2010

Overview

The Bakersfield CVB maintains an online system for hoteliers to easily and efficiently track and respond to leads sent out by the CVB sales staff. The system allows hoteliers to respond to new leads, view past leads and view the convention calendar all in real time. The program makes it easy for hoteliers to track activity related to the CVB's sales efforts. The partner extranet is the exclusive method by which the CVB sends out leads to local hoteliers. The system is accessible any time you want to review or respond to leads or to view or print the convention calendar.

Receiving the Lead Notification

You will receive an e-mail from the CVB sales staff notifying you there is a new lead posted to the system and for you to login and respond. Click the link in the e-mail to bring you to the login page (see below). **Please make sure the CVB has your correct e-mail address on file.**



Bakersfield Convention & Visitors Bureau CRM Extranet Login

simpleview CRM CBW

Username:

Password:

Remember Username:

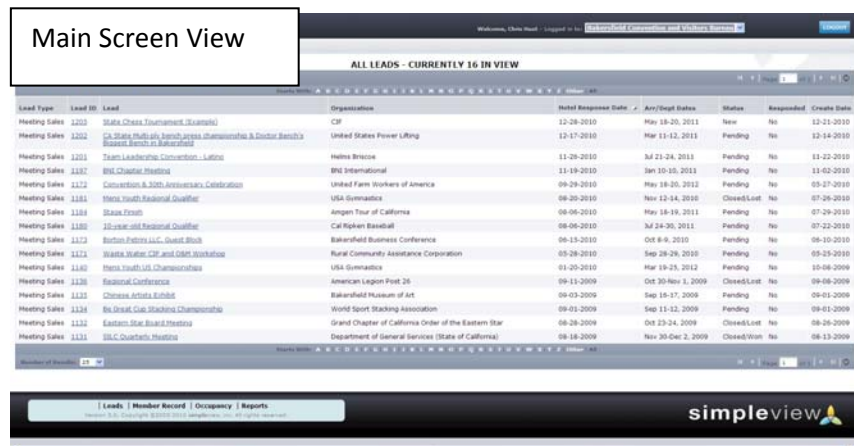
[Forgot Password?](#)

Login

Login

Click on the link in the e-mail or go to <http://www.VisitBakersfield.com/partners>, click the 'Hotel Login' icon and use your e-mail address and the password provided to you in a previous e-mail to login to the system. If you have forgotten your password, click on the 'Forgot Password?' link to retrieve it.

Main Screen View



Lead Type	Lead ID	Lead	Organization	Mailed Response Date	Any/Draft Dates	Status	Responded	Create Date
Meeting Sales	1203	State Chess Tournament (Luzerne)	CFP	12-28-2010	May 19-20, 2011	New	No	12-21-2010
Meeting Sales	1202	CA State Multiple Branches Championship & District Branch Support Banquet in Bakersfield	United States Power Lifting	12-17-2010	Mar 11-12, 2011	Pending	No	12-14-2010
Meeting Sales	1201	Team Leadership Convention - Latino	Holms Brosco	11-29-2010	Jul 21-24, 2011	Pending	No	11-22-2010
Meeting Sales	1187	BMJ Chapter Meeting	BMJ International	11-19-2010	Jan 10-16, 2011	Pending	No	11-02-2010
Meeting Sales	1122	Convention & 200 Anniversary Celebration	United Farm Workers of America	09-29-2010	Nov 19-20, 2012	Pending	No	09-27-2010
Meeting Sales	1181	Men's Youth Regional Qualifier	USA Gymnastics	08-20-2010	Nov 12-14, 2010	Closed/Lost	No	07-26-2010
Meeting Sales	1184	State Youth	Angen Tour of California	08-06-2010	May 18-19, 2011	Pending	No	07-29-2010
Meeting Sales	1183	Jr/Junior National Qualifier	Cal Ripken Baseball	08-06-2010	Jul 24-26, 2011	Pending	No	07-22-2010
Meeting Sales	1172	Barton Peters LLC Guest Book	Bakersfield Business Conference	06-15-2010	Oct 6, 2010	Pending	No	06-10-2010
Meeting Sales	1171	Bakers Water CIP and O&M Workshop	Rural Community Assistance Corporation	05-28-2010	Sep 28-29, 2010	Pending	No	05-25-2010
Meeting Sales	1160	Men's Youth US Championships	USA Gymnastics	01-20-2010	Mar 19-25, 2012	Pending	No	10-06-2009
Meeting Sales	1128	National Conference	American Legion Post 24	06-15-2009	Oct 20-Nov 1, 2009	Closed/Lost	No	09-08-2009
Meeting Sales	1123	Chinese Artists Exhibit	Bakersfield Museum of Art	05-03-2009	Sep 16-17, 2009	Pending	No	06-01-2009
Meeting Sales	1114	Big Bear Club Skinning Championships	World Sport Skinning Association	09-01-2009	Sep 11-12, 2009	Pending	No	09-01-2009
Meeting Sales	1112	Eastern Star Board Meeting	Grand Chapter of California Order of the Eastern Star	08-28-2009	Oct 23-24, 2009	Closed/Lost	No	08-26-2009
Meeting Sales	1111	USCC Quarterly Meeting	Department of General Services (State of California)	08-18-2009	Nov 30-Dec 2, 2009	Closed/Work	No	08-13-2009

simpleview

Reviewing and Responding to Leads

1. Upon logging in, you will be taken to your home screen – the default is the leads tab.

2. On this screen, you can view the following via the dropdown menus:

- All Leads
- New Leads
- Pending Leads
- Closed/Won Leads
- Closed/Lost Leads
- Closed/TBD Leads (meeting has chosen Bakersfield, but no hotels selected)

You can also filter leads by market type, if your property responded or not or you can search for a lead by keyword.

3. You are able to sort your list of leads by clicking on any of the column headers (i.e. Meeting Name, organization, arrival dates, response date, etc). Note the 'hotel response date' – after this date, you will not be able to respond or edit your lead responses online.

4. To view new leads choose 'New' from the drop down menu in the upper left hand corner of the screen. The system will refresh the page will show new leads only. To view detailed lead information click on the 'Lead ID #' or 'Lead' column header.

5. Click on the 'Lead ID #' or 'Lead' column header to open and respond to it.

6. Scroll to the bottom of the lead and click on 'Add Your Response' (See Picture #1 on next page).

7. Fill in the appropriate information, and click "save" at the bottom (See Picture #2 on next page). *If your property does not want to pursue the lead, select 'no' at the top of the response page and scroll down and click 'save'.*

8. Items in red are required fields.

9. If a client response is required, click on the client's e-mail address to send your response directly to the client (respond to the CVB online in addition to this response).

Picture #1

LEAD DETAIL: STATE CHESS TOURNAMENT (EXAMPLE)

Lead Information

Lead ID: 1205
 Meeting Name: State Chess Tournament (Example)
 Account: CIF
 Type: Home
 EEE Type: Default EEE
 Decision Making Process: Committee/Board
 Status: New
 Decision Date: 01-01-2011
 Hotel Response Due: 12-20-2010
 Repeat Business: No
 Sales Manager: Chris Hunt
 (661) 325-5051
 chunt@cvbbaakersfield.com

Profile:
 Source Code: Home
 Market Segment: Athletic & Sports/Recreation
 Meeting Pattern: Not Applicable
 Room Attendees: 400
 Show Attendees: 500
 Site Inspection? No
 Confidential: Yes

Meeting Requirements: N/A
 Schedule of Events: Conference to be held at the Convention Center May... (Show More)
 Action Requested: Please respond with rates and availability in the... (Show More)
 Comments: Looking for headquarter hotel. Here is the breakdo... (Show More)
 Competitive Sites: Fresno, Visalia
 Meeting Specs:
 Lost Business Code:
 Lost Comments:

Arrival Dates: Preferred Date: 5/18/2011 - 5/20/2011
 Alternate Date:

Date Information: Date Comments:

Room Summary

Requested Rooms							Totals and Peak	
Wed	Thu	Fri	Sat	Sun	Mon	Tue	Requested Rooms:	Peak Requested:
05/18	05/19						400	200
200	200							
100%	100%						Additional room requests/needs:	

History/Futures: History/Futures are not available for this lead

Responses

Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	05/18/2011 - 05/20/2011 (Primary)	05/18/2011 - 05/19/2011	No Response Entered			--Attachments--

Picture #2

on & Visitors Bureau CRM

Welcome, Chris Hunt - Logged In to: **Bakersfield Convention and Visitors Bureau** [Logout](#)

Occupancy Reports

Response Information

Pursuing this lead? Yes No

Comments: Hot breakfast included. Rate does not include 12 percent tot tax.

Bureau-Only Comments: These comments will not be seen by the client; they will only be seen by the staff of simpliview.

Rate Range: 0 to 0

Requested Rooms: 400 Peak Night Rooms: 200

Room Information

	Wednesday 05/18/2011	Thursday 05/19/2011	Friday 05/20/2011	Saturday 05/21/2011	Sunday 05/22/2011	Monday 05/23/2011	Tuesday 05/24/2011
Any	0	0					
Singles	200	200					
Doubles	0	0					
Suite 1	0	0					
Suite 2	0	0					

Viewing the Convention Calendar

Directly above the dropdown menu in the upper left-hand corner of the web page there is a tab labeled 'Reports' - click that button. Then click the 'Partner Convention Calendar'. At the top, center of the page choose a start date and an end date and click 'Refresh'. This will display all events the CVB has booked during that date range. The information available includes: the event name, the event dates, date booked, room nights, peak rooms, attendance and headquarter hotel. You can click the 'Printable View' button at the top of the page to open a printer-friendly window.

Contact and Support

- For specific information on a lead, please e-mail Matt Billingsley at:
MBillingsley@visitbakersfield.com
- For information related to your account, passwords or problems accessing the system e-mail Chris Huot at: CHuot@visitbakersfield.com.