



## **Visit Estes Park Extranet**

### **Stakeholder User Guide**

<http://extranet.estespark.simpleviewcrm.com>

**Visit Estes Park  
1200 Graves Avenue  
Estes Park, CO 80517  
970.586.0500**

[www.visitestepark.com](http://www.visitestepark.com)

Welcome to the Visit Estes Park Extranet! The extranet is a password-protected forum just for Visit Estes Park stakeholders, where stakeholders can edit and update listings, photos, specials, social media channels, and more; view account and contact information; respond to media requests, service requests, or if applicable, group leads; submit communication to Visit Estes Park staff members; read important bulletins posted by Visit Estes Park; submit data such as occupancy information to Visit Estes Park; and more.

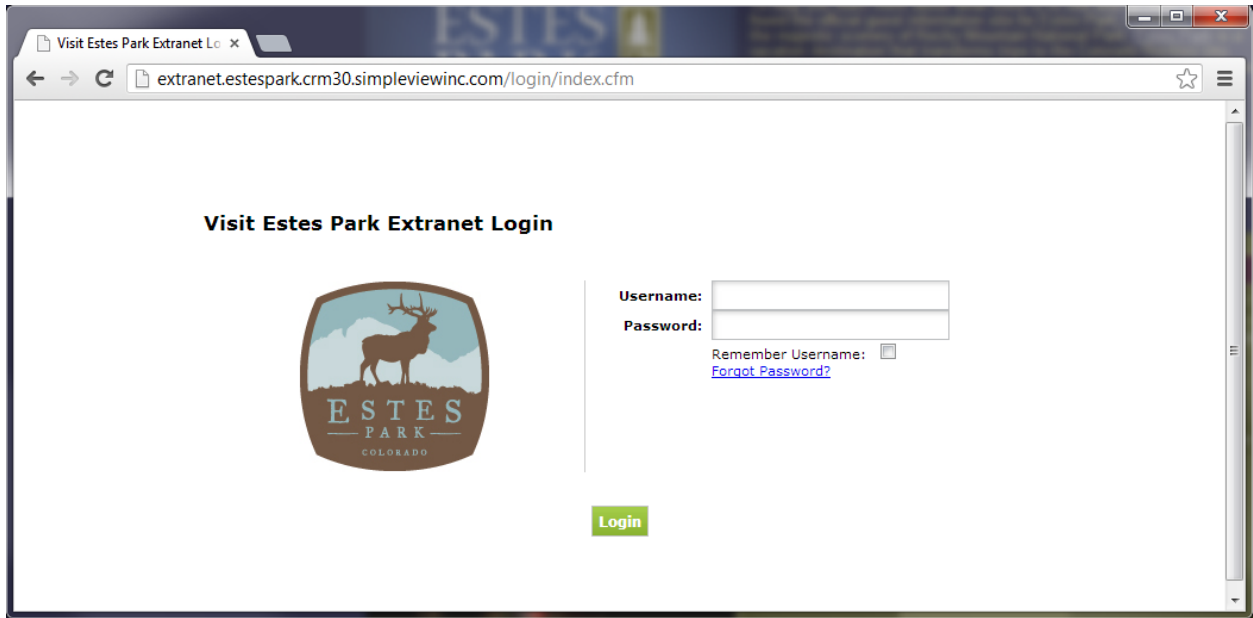
This user guide, included below, details the following how-to's:

- Logging In (including Password Recovery)
- Partner Bulletins
- Member Record Updates
  - Editing your listing
  - Adding photos, specials, social media channels
  - Reviewing in kind/expenses received from Visit Estes Park
  - Reviewing invited events, articles associated with your business and FAM/Site Visits from Visit Estes park
- Responding to Service Requests

For questions about the Visit Estes Park Extranet, please contact staff at 970.586.0500.

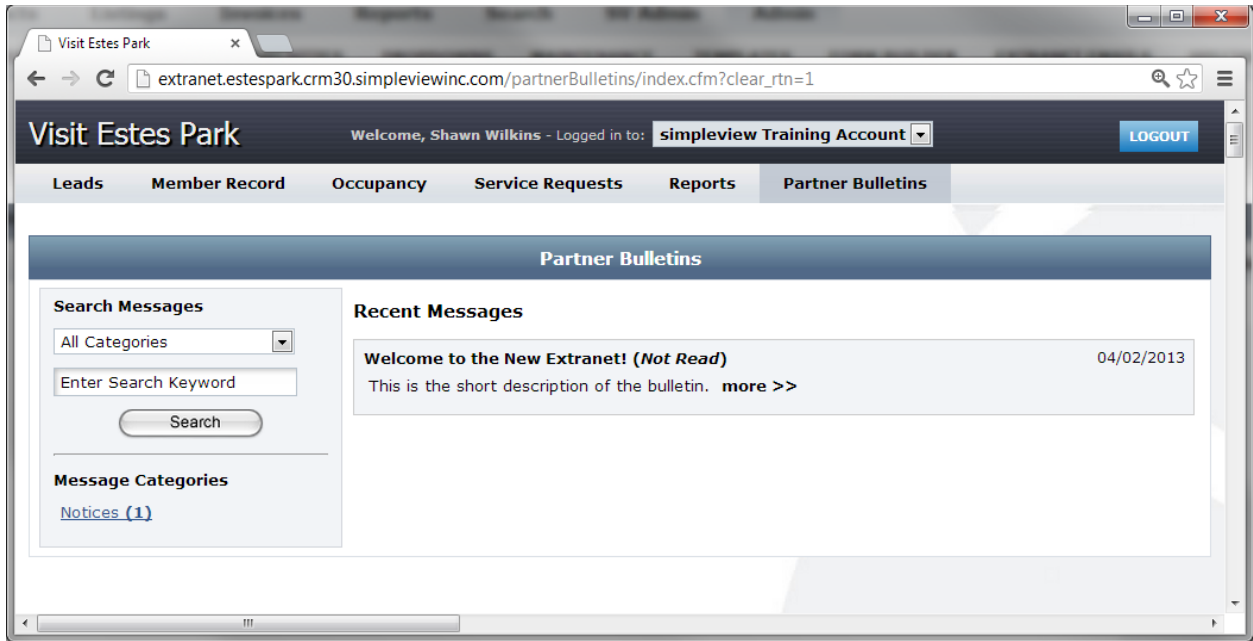
#### **Logging In:**

1. You will be sent an email from Visit Estes Park with the link to the extranet and a temporary password.
2. Click on the link, which will take you to a "Visit Estes Park Extranet Login" screen.
3. Your username is your full e-mail address.
4. Your password is a temporary password that was e-mailed to you.
5. Upon logging in with your temporary password, **you will be prompted to change your password to one of your preference.**
  - a. If you are assigned to more than one stakeholder account (e.g. multiple lodging properties, restaurants, etc.) and have the same email address for each member account, you will need to create a unique password for each login. You cannot use the same email address and password to login to the extranet for multiple stakeholder accounts.
6. If you ever have problems getting into your account, contact Visit Estes Park. We can look up your password, or reset it and have a new one generated to you.

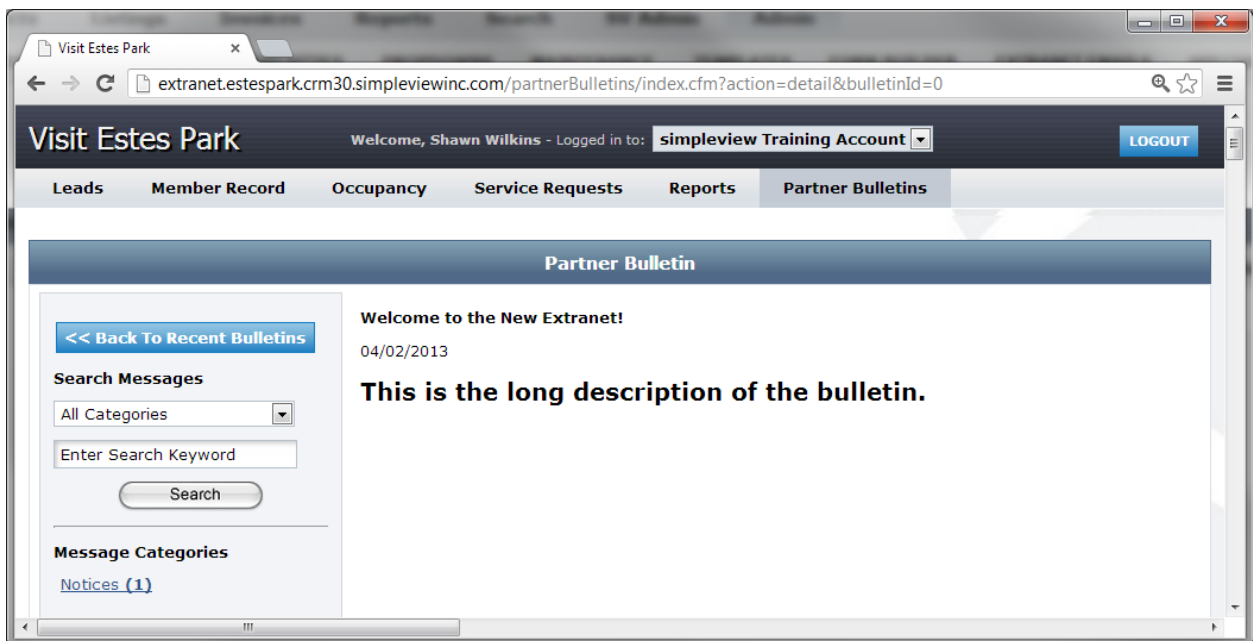


### Partner Bulletins:

1. After successfully logging in, you will be taken to the Partner Bulletin page. This is where Visit Estes Park will communicate partner information to you. Things such as extranet documentation, event reminders, Visit Estes Park board meeting agenda, etc.
2. You can search for bulletins in the keyword search on the left side of the page or select a category to view messages in specific categories.
3. In the center of the page are the bulletins. This page gives you a brief summary of the bulletin and any attachments that pertain to the bulletin (attachments are denoted with a paperclip).
  - a. To the right of the bulletin title, it will indicate if you have read the bulletin and if so, give you the date it was read.



4. To view the bulletin in more detail, click the “more >>” link at the end of the bulletin.
5. When are finished reading the details of the bulletin, you can click the “Back to Recent Bulletins” button to be taken to the Bulletin home page.



## Viewing Your Stakeholder Record (top navigation item titled “MEMBER RECORD”):

You can view six items under the Member Record navigation:

1. Account Details
2. Contacts
3. Listings (Website)
4. Web (Coupons/Special Offers & Media/Images)
5. Amenities
6. Benefits Summary

### Account Details:

1. You can view and edit your account information directly from the extranet. To edit, click the Edit button at the top of the Member Record page.

The screenshot shows a web browser window with the URL `extranet.estespark.crm30.simpleviewinc.com/mem/accts/index.cfm?clear_rtn=1#tab:1`. The page title is "ACCOUNT DETAIL: SIMPLEVIEW TRAINING ACCOUNT". There is an "Edit" button at the top.

**Account Information**

Account ID: <b>2521</b>	Status: <b>Active</b>
Account: <b>simpleview Training Account</b>	Region: <b>Downtown</b>
Account (sort): <b>simpleview Training Account</b>	Email: <b>info@simpleviewinc.com</b>
Parent:	Web Site: <a href="http://www.simpleviewinc.com">www.simpleviewinc.com</a>
Formerly:	

**Phone/Fax Numbers**

Primary: <b>(520) 575-1151</b>	Alternate:
Tollfree:	Fax:

**Address Information**

Physical Address	Billing Address	Shipping Address
<b>7458 N. La Cholla Blvd. Tucson, AZ 85743 UNITED STATES</b>	<b>7458 N. La Cholla Blvd. Tucson, AZ 85743 UNITED STATES</b>	<b>7458 N. La Cholla Blvd. Tucson, AZ 85743 UNITED STATES</b>

Navigation tabs: **Contacts** | Listings | Web | Amenities | Benefits Summary

[Add New Contact](#)

Filter: --Any Type--

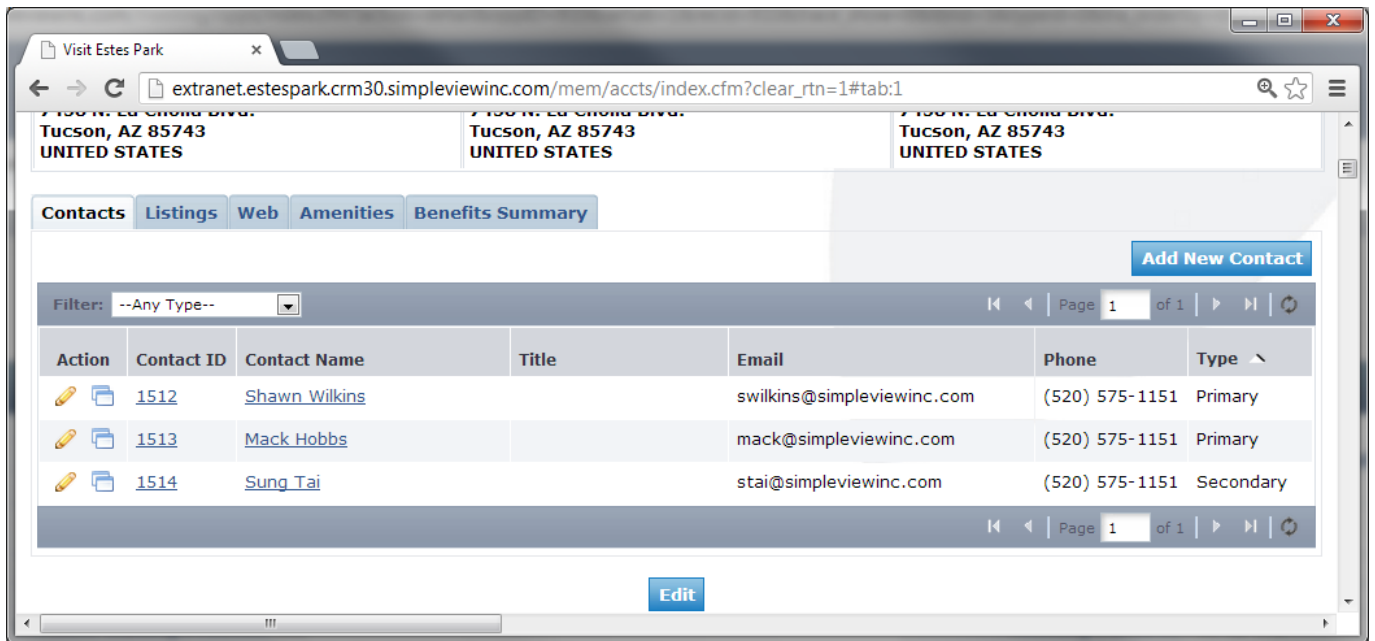
Page 1 of 1

Action	Contact ID	Contact Name	Title	Email	Phone	Type
	<a href="#">1512</a>	<a href="#">Shawn Wilkins</a>		swilkins@simpleviewinc.com	(520) 575-1151	Primary
	<a href="#">1513</a>	<a href="#">Mack Hobbs</a>		mack@simpleviewinc.com	(520) 575-1151	Primary
	<a href="#">1514</a>	<a href="#">Sung Tai</a>		stai@simpleviewinc.com	(520) 575-1151	Secondary

Page 1 of 1

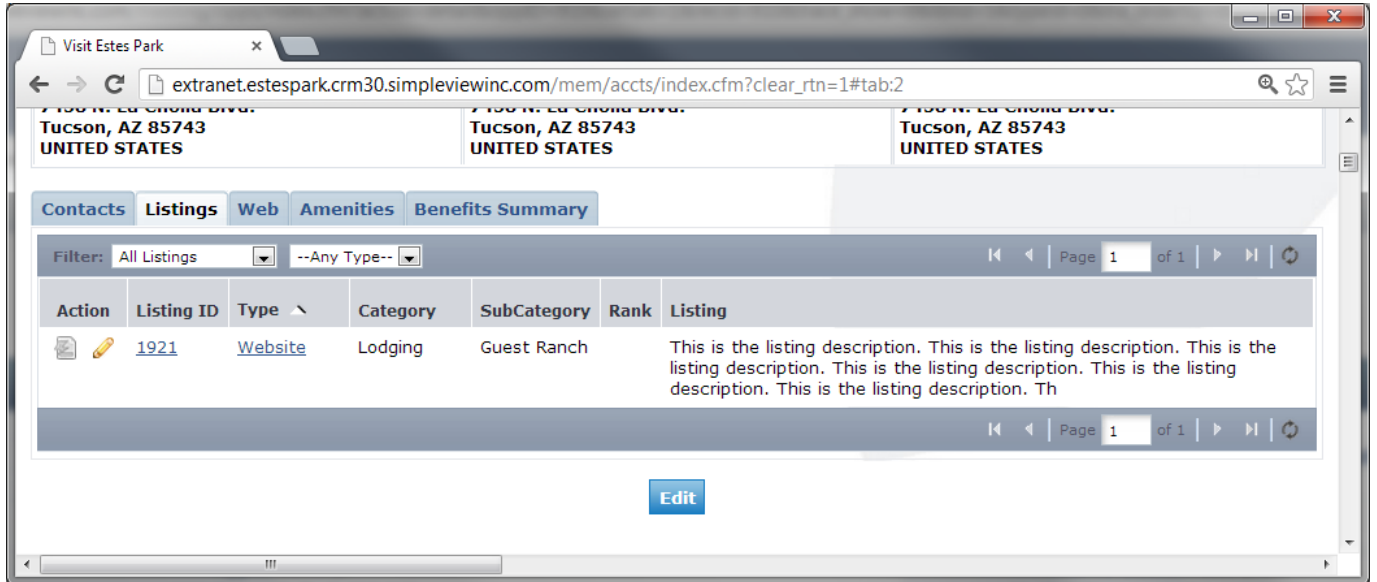
**Contacts:**

1. To add or update an existing contact record, click the Contact tab at the bottom of the Member Record. Click the pencil icon to edit an existing contact or click the Add New Contact button to add a contact.
  - a. **IMPORTANT NOTE: If a contact leaves the property, you are responsible for marking the Contact Type as “Inactive”.**
2. If a contact needs access to the extranet, you will need to contact Visit Estes Park to discuss the levels of access the contact needs.



**Listings:**

1. To update your listing, click the “Edit” icon to the left of the appropriate listing.
2. You will then be able to change your description.
3. Your changes will be pending until a Visit Estes Park team member approves them. You cannot alter a listing that is pending approval.



## Editing a Listing:

1. Address Type: Select “Physical” to display the main address on your account
2. Listing: Enter your descriptive text for your venue.
3. Listing Details: This information will pull in from your Account Detail
  - a. **IMPORTANT NOTE:** By clicking the “Overwrite” box next to each field you may replace it with alternate text
    - i. For example: If you choose to overwrite Address 1 with “Corner of Main and 1<sup>st</sup>”, this will be the address 1 line displayed publically on the website.
4. Click the “Save” button when you are finished making any changes
5. When you return to your listing screen, you will be able to tell that your listing changes are pending by seeing that the pencil icon is grayed out.

The screenshot shows a web browser window with the URL `extranet.estespark.crm30.simpleviewinc.com/mem/listings/index.cfm?action=form&listingID=1921`. The page title is "LISTING: UPDATE LISTING FOR SIMPLEVIEW TRAINING ACCOUNT".

At the top, there are "Save" and "Cancel" buttons. Below them is a red message: "Colored Fields are Required".

The "Listing Information" section contains the following fields:

- Type: Website
- Company: simpleview Training Accr
- Contact: Shawn Wilkins (Primary)
- Category: Lodging
- Address Type: Account: Physical
- SubCategory: Guest Ranch
- Listing: This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description. This is the listing description.

The "Additional Subcategories" section shows "Catering: Catering".

The "Listing Details" section is a table with the following columns: "Field", "Overwrite?", "Account Value", and "Overwrite with...".

Field	Overwrite?	Account Value	Overwrite with...
Company:	<input type="checkbox"/>	simpleview Training Account	
Company (sort):	<input type="checkbox"/>	simpleview Training Account	
Address Line 1:	<input type="checkbox"/>	7458 N. La Cholla Blvd.	
Address Line 2:	<input type="checkbox"/>		
Address Line 3:	<input type="checkbox"/>		
City:	<input type="checkbox"/>	Tucson	



## Extranet Guide for **Coupons/Specials** on VisitEstesPark.com:

1. To create or edit coupons/specials for the [www.visitestepark.com](http://www.visitestepark.com) website, log into the Extranet and, under the Account Details page, click on the “Web” and then “Coupons” sub-tab

**Figure A:** Extranet Account Detail page - Web tab, Coupons tab

1200 Graves Avenue  
Estes Park, CO 80517  
UNITED STATES

PO BOX 4420  
Estes Park, CO 80517  
UNITED STATES

1200 Graves Avenue  
Estes Park, CO 80517  
UNITED STATES

Additional Fields

Account UDF Group

Alternate Email

Contacts Listings **Web** Amenities Benefits Summary Social Media

Coupons **Media**

Upload new images

Add New Coupon

Filter: All Coupons --Any Type--

Action	Offer Title	Pending	Redeem Start	Redeem End	Post Start	Post End
 	Save \$3 on Entry Fee to Estes Park!	No	04/01/2015	12/31/2015	04/01/2015	12/31/2015

Edit Icon Clone Icon Edit

2. Any past offers you have posted will be listed in this screen
  - a. You can filter these offers so that only the pending specials show and/or by category. Offers can also be sorted by clicking the column headers
3. To add a new special, click on the “Add New Coupon” button on the right
4. Complete the fields on the form (For additional direction on listing selection and categories, please refer to the chart below.)
  - a. **Offer Title:** Enter the name or headline of your coupon. This will be listed in bold on the coupons page(s), so making it intriguing, descriptive and relevant is important.
  - b. **Offer Link:** Please link to the page on your website that specifically details this offer and/or allows them to book the offer.
  - c. **Offer Text:** Description/details of the offer – include benefits, price, restriction dates and how to redeem offer if applicable
    - i. **Specials MUST offer value to the consumer.** Examples include: Percentage or dollar amount savings; Free gift or free add-on service with purchase; Quantity – Buy three tours/nights, get the 4<sup>th</sup> free, etc. Specials that do not offer value to consumers will be deactivated and notice will be sent to the Contact/Account associated with the listing/coupon.
    - ii. **Be sure your offer text is relevant to the category where it will appear.** Each Special can be associated to only one Listing Section. For example, a Special pertaining only to tours should not be listed in “Where to Stay” Category and should not be linked to listings in the “Lodging” sections. Potential guests/customers benefit from having relevant offers appear in the area they are looking for.

- d. **Coupon Image:** (See *Figure B* below) You may add a photo to your coupon by selecting from the dropdown list of existing images in the “Media” section of your account. To upload new images, save your coupon and go to the “Media” tab (see *Figure A* above), upload the new image under the “image” (not “logo”) category. **Images must be photos with NO TEXT in order to properly display.** Once approved, the new image will appear on the image dropdown list in the coupons edit window.
  - e. **Coupon Dates:** (See *Figure C* below)
    - i. **Enter “Redeem From” & “Redeem To” Dates** – these will print on the coupon to indicate the date range in which the coupon is valid (e.g. expiration date).
    - ii. **Enter “Post From” and “Post To” dates** – your coupon will only show on the website during this date period and will automatically be removed on the day after the “Post To” date.
  - f. **Coupon Categories:** Select the category by clicking the arrow button, moving the Category to the right hand column. (See *Figure C* below - “Centennial” & “What to Do” Categories are selected)
    - i. **Each coupon can be associated with only one “Permanent” category and one “Promotion” category.** You may make coupons for multiple, different categories, but please tailor the title and description to the category in which it appears. NOTE: If two categories are selected, the coupon may show twice on the associated listing(s).
    - ii. Refer to the chart below for examples of Categories. “Promotion” categories are temporary and typically will be placed on VisitEstesPark.com landing pages where Visit Estes Park advertising and promotion will direct consumers.
  - g. **Add to Listing(s):** Select the listing(s) that you want your coupon to be linked to by clicking in the box next to the listing(s) – see *Figure C* below. The listings need to be in the Listing Section associated with the Category you selected AND **all selected listings must be in the same Listing Section** – refer to the chart below if unsure.
  - h. **Click “Save” to submit** the coupon to the DMO for approval
5. Upon approval, your offer will appear on the selected linked listing(s), as well as on a page listing the selected specials Category. See the chart below for details.
  6. To edit the coupon, go to the “Coupons” tab in the “Web” section and click on the Pencil (edit) icon (See *Figure A* above) to the left of your coupon, and make the desired changes in the edit window. You can also start from an existing coupon by clicking the “Clone” icon.

COUPON CATEGORY DETAIL CHART			
Category	Listing Section	Category Type	Webpage
What to Do	Things To Do	Permanent	<a href="#">Specials</a>
Where to Stay	Lodging	Permanent	<a href="#">Specials</a>

Where to Eat	Dining	Permanent	<a href="#">Specials</a>
Wedding Specials	Weddings	Permanent	<a href="#">Wedding Specials</a>
Reunion Specials	Reunions	Permanent	<a href="#">Reunion Specials</a>
Meeting Specials	Meetings	Permanent	<a href="#">Meeting Specials</a>
Centennial Specials	Lodging, Things to Do, OR Dining	2015 Promotion	<a href="#">Centennial Landing Page</a>
Extend Your Stay	Lodging	2015 Spring Promotion	<a href="#">Vacation Landing Page</a>

**NOTES:**

- ‘Promotion’ categories are temporary and typically associated with a specific event and/or promotion that Visit Estes Park is marketing. Additional ‘Promotion’ categories will be added for special events, holidays, campaigns, etc. We will do our best to communicate them via the Stakeholder Newsletter and these categories will appear in the drop-down when adding or editing coupons.
- Coupon webpages may not be “live” if there are not any active coupons in that category.
- Only 2 categories may be added to a coupon: 1 Permanent and 1 Promotion. Be aware that if two categories are selected, the coupon may appear twice on the associated listing.
- Only 1 Listing Section may be linked per coupon; however the coupon may be linked to all listings in that section.

**Figure B:** Top of coupon add/edit window

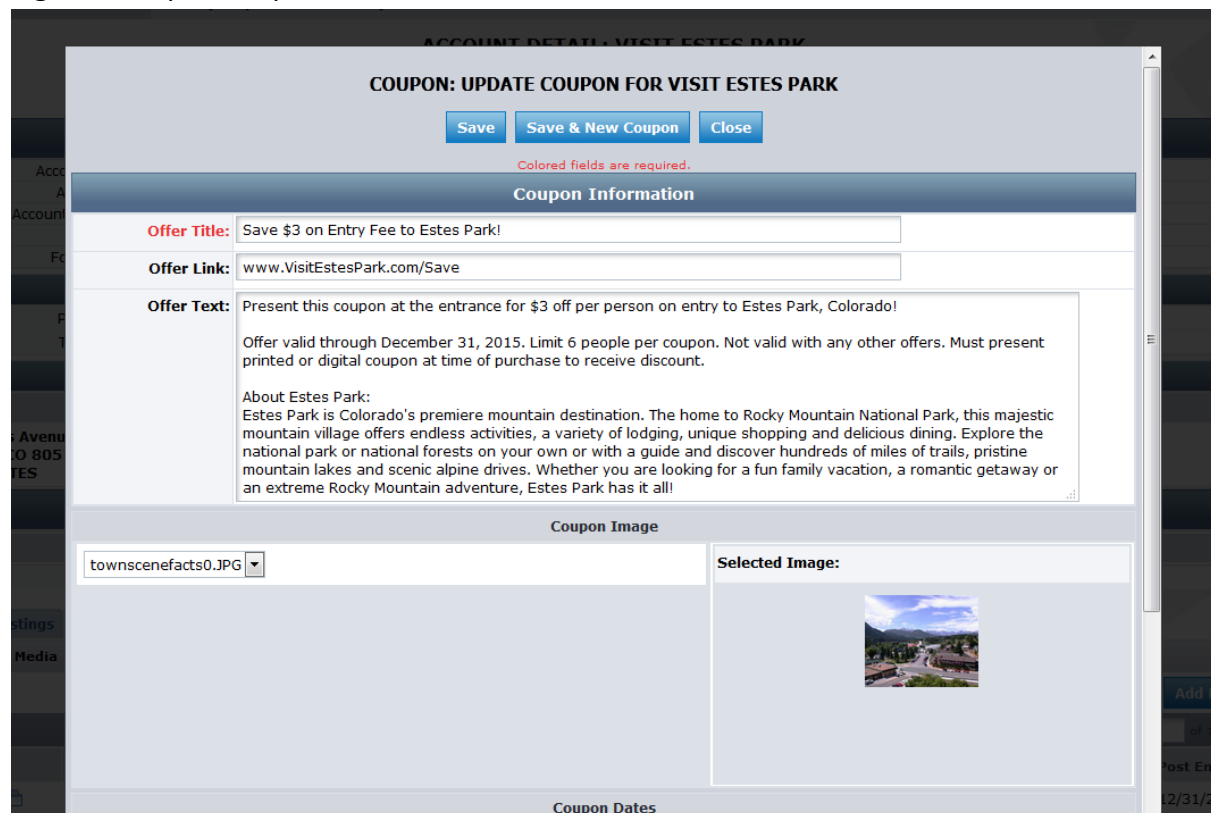


Figure C: Bottom half of Coupon add/edit window

ES

Coupon Dates

Redeem From: 04/01/2015 Redeem To: 12/31/2015

Post From: 04/01/2015 Post To: 12/31/2015

Coupon Categories

Available

- Extend Your Stay
- Where to Eat
- Where to Stay
- Wedding Specials
- Meeting Specials
- Reunion Specials

Selected

- Centennial Packages & Special Offers
- What to Do

Add To Listing(s)

Visit Estes Park (Website: Things to Do: Outdoor Adventure)

Colored fields are required.

Save Save & New Coupon Close

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## Listing Images

To view, edit or add your website images, go to the Web tab and then click the “Media” subtab.

Visit Estes Park

extranet.estespark.crm30.simpleviewinc.com/mem/accts/index.cfm?clear\_rtn=1#tab:5

7100 N. La Granda Blvd. Tucson, AZ 85743 UNITED STATES

7100 N. La Granda Blvd. Tucson, AZ 85743 UNITED STATES

7100 N. La Granda Blvd. Tucson, AZ 85743 UNITED STATES

Contacts Listings Web Amenities Benefits Summary

Coupons Media

New Logo/Image New IPDX New YouTube

Filter: All Types Page 1 of 1

Action	Type	Title	Filename	Created By	Created	Last Updated By	Last Updated	Sort Order
	Image	Test Image	Koala0.jpg	User: Test User	04-02-2013			1

Edit

1. To upload a new image, click “New Logo/Image”

- a. Select "Image" as image type**
- b. Enter any photo description you want associated with the image**
- c. Click the box next to the listings that you want your photo to be attached to**
- d. Click "Save" to add you4r image**
- e. Note that all listing images should be sized at a minimum of 260 x 164**

## **Amenities**

There are several sub-tabs under this section that you can use to promote your venue

1. To edit this information, click the “Edit Amenities” button, make your changes and then save.

## **Benefits Summary:**

This section provides information on your partnership with Visit Estes Park, such as:

Inkind/Expenses

1. Inkind/Expenses
2. Inkind/Expenses Received
3. Group Leads, if applicable
4. Services
5. Events
6. Articles
7. Advertising Opportunities
8. FAM/Site Inspections

### Inkind/Expenses:

1. You can filter by Inkind or Expenses
2. The Expenses section shows you when Visit Estes Park has visited your property or taken someone to your property; You can see who came, the date visited, and how much was spent at your business.
3. The Inkind section shows if you have donated your services to Visit Estes Park.

Visit Estes Park

extranet.estespark.crm30.simpleviewinc.com/mem/accts/index.cfm#tab:13

Contacts Listings Web Amenities **Benefits Summary**

**Inkind/Expense** Inkind/Expense Received Leads Services Events Articles Web Site Coupon Hits

Advertising Opportunities Fams/Site Inspections

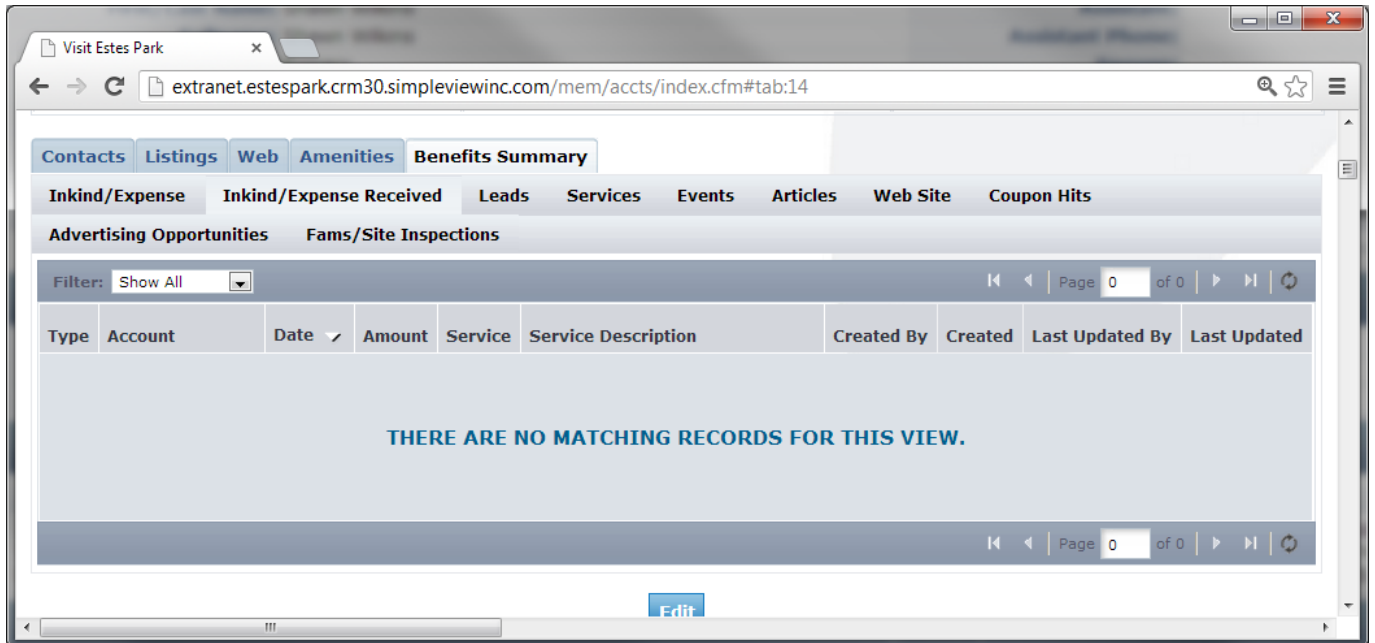
Filter: --Both-- --All Types-- --All Groups-- 04/01/2013 to 04/30/2013 Page 1 of 1

Inkind ID	I/E	Group	Entity	Type	Date	Amount	Service	Date Added	Added By
1	Expense	Meeting Sales	simpleview Annual Training Meeting 2013	Meal	04/02/2013	\$120.00	Took meeting planner to dinner.	04/02/2013	Test User
2	Inkind	Meeting Sales	simpleview Annual Training Meeting 2013	Accommodation	04/02/2013	\$199.00	Donated a room night for a site visit.	04/02/2013	Test User

Page 1 of 1

### Inkind/Expenses Received:

1. You can filter by Inkind or Expenses.
2. Inking/Expenses Received is very similar to Inkind/Expenses but with one difference. It shows when Visit Estes Park took someone from your property to another stakeholder's business.



The screenshot shows a web browser window with the URL `extranet.estespark.crm30.simpleviewinc.com/mem/accts/index.cfm#tab:14`. The interface includes a navigation menu with tabs for **Contacts**, **Listings**, **Web**, **Amenities**, and **Benefits Summary**. Below this, there are sub-tabs for **Inkind/Expense**, **Inkind/Expense Received**, **Leads**, **Services**, **Events**, **Articles**, **Web Site**, and **Coupon Hits**. Further down, there are tabs for **Advertising Opportunities** and **Fams/Site Inspections**. A filter dropdown is set to **Show All**. The table below has columns: **Type**, **Account**, **Date**, **Amount**, **Service**, **Service Description**, **Created By**, **Created**, **Last Updated By**, and **Last Updated**. The table is empty, displaying the message **THERE ARE NO MATCHING RECORDS FOR THIS VIEW.** at the bottom of the table area. A **Edit** button is visible at the bottom center of the page.



**Services:**

1. This section allows you to see when Visit Estes Park has requested your assistance for a media visit, group visit, FAM tour, etc.
2. These items are also converted into reports when you click on them

The screenshot shows a web browser window with the URL `extranet.estespark.crm30.simpleviewinc.com/mem/accts/index.cfm?clear_rtn=1#tab:16`. The page displays a navigation menu with tabs for **Contacts**, **Listings**, **Web**, **Amenities**, and **Benefits Summary**. Below this is a secondary menu with **Inkind/Expense**, **Inkind/Expense Received**, **Leads**, **Services**, **Events**, **Articles**, **Web Site**, and **Coupon Hits**. Further down, there are **Advertising Opportunities** and **Fams/Site Inspections**. A **Date Range** filter is set to **01/01/2013** to **12/31/2013**, with a **Refresh** button. A red instruction reads: *Click on any section in first column to see a detailed report*. The main content area is divided into sections: **Meeting Sales**, **Reunions**, **Weddings**, and **Tour/Travel**. Each section contains a table with three columns: a link to a detailed report, a numerical value, and a percentage. The data for Meeting Sales is as follows:

Meeting Sales		
<a href="#">Number of Service Requests Sent</a>	1	-
<a href="#">Number of Service Requests Won</a>	0	0.00%
<a href="#">Number of Partner Referrals</a>	1	-

The Reunions and Weddings sections show zero values for all three metrics. The Tour/Travel section is partially visible at the bottom.

## Events:

1. Under the Events tab, you can view if your property has been invited to any events such as Annual Stakeholder Summits, Orientations, etc.
2. The “# of Attendees” is the number of people from your property who were invited to the event.
3. The “# of Attended” is the number of people from your property who actually attended the event.
4. The event date, location, start/end dates, and event type are all shared in this tab

Visit Estes Park

extranet.estespark.crm30.simpleviewinc.com/mem/accts/index.cfm#tab:17

Contacts Listings Web Amenities Benefits Summary

Inkind/Expense Inkind/Expense Received Leads Services Events Articles Web Site Coupon Hits

Advertising Opportunities Fams/Site Inspections

Filter: 01/01/2013 to 12/31/2013 Page 1 of 1

Event Name	Location	Event Start Date	Event End Date	Event Type	# Attendees	# Attended
Annual Stakeholder Luncheon 2013	simpleview Training Account	03/04/2013	03/04/2013	Member Event	2	1

Edit

**Articles:**

- 5. Under the Articles tab, you can view if your property has been included in any articles that have been generated in publications due to the efforts of Visit Estes Park
- 6. The article date, title, author, medium and circulation (if known) are all shared in this tab



### Advertising Opportunities:

1. Under the Advertising Opportunities tab, you can view any promotions in which you participated with Visit Estes Park and the amount paid for these opportunities.

Promotion	Amount	Ad Category	Cash Amount	Trade Amount
Visitor Guide 2013	\$200.00	Visitor Guide	\$50.00	\$150.00

### FAM/Site Inspections:

1. Under the FAM/Site Inspections tab, you can view if your property has been host or provided services for a FAM or Site Inspection (or property visit).
2. The “Role” column lets you know if you were hosting the activity or providing services for the activity.
3. The “# of Attendees” is the number of people participating in the activity you are hosting or providing services.

Role	Event Name	Event Start/End Dates	# of Attendees	Inspection Lead	Lead Account	Event Type	Activities
Event Location	Annual Stakeholder Luncheon 2013	Mar 4-4, 2013	1			Member Event	
Service Provider	Annual Stakeholder Luncheon 2013	Mar 4-4, 2013	1			Member Event	Lunch

## Reviewing Service Requests:

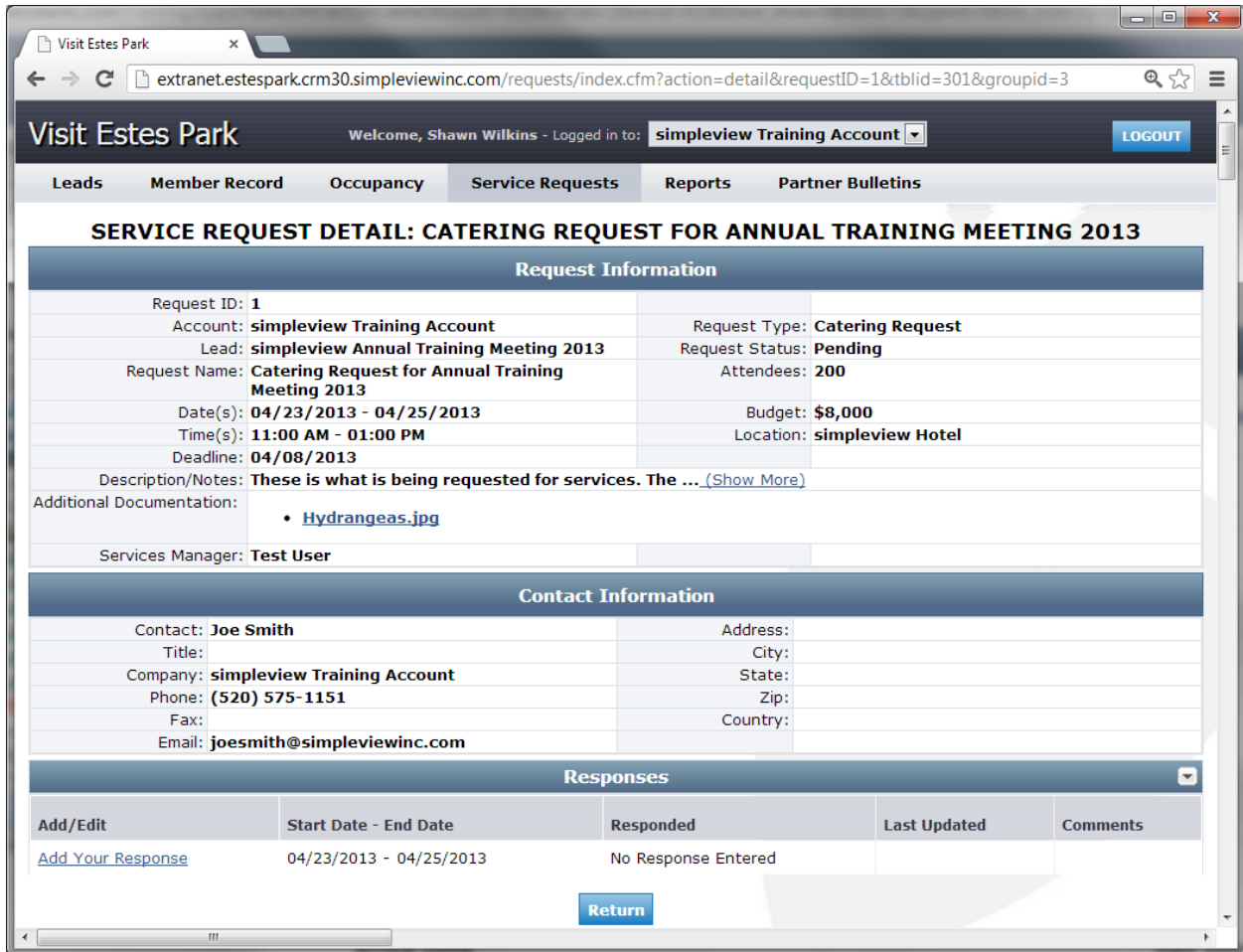
1. Once you are logged in, click on the “Service Requests” tab in the top navigation of the extranet
2. Automatically all (past and future) Service Requests are displayed. These can be filtered by:
  - a. Status
    - i. New – service request is not lost or definite and the response date has not past
    - ii. Pending – service request is not lost or definite but the response date has past
    - iii. Closed/Won – service request turned definite where your business was chosen
    - iv. Closed/Lost – service request turned definite where your business was not chosen OR the service request was turned to lost business
  - b. Groups (meeting, travel trade, media, events)
3. You are able to sort your list of service requests by clicking on any of the column headers (i.e. Service Request Name, Contact, etc)
4. If you select “New” under the “Status” drop-down, it will show only the service requests that you are still able to respond to

The screenshot shows the 'Visit Estes Park' extranet interface. The user is logged in as 'Shawn Wilkins' with a 'simpleview Training Account'. The 'Service Requests' tab is selected in the navigation menu. The page title is 'ALL SERVICE REQUESTS - CURRENTLY 1 IN VIEW'. There are filter options for status and groups, and a search bar. Below the filters is a table of service requests. The table has columns for Request Type, Request ID, Service Request, Contact, Lead, Type, Deadline, Status, and Responded. One request is listed: Meeting Sales (Request ID 1), Catering Request for Annual Training Meeting 2013, Contact Joe Smith, Lead simpleview Annual Training Meeting 2013, Type Catering Request, Deadline 04/08/2013, Status New, and Responded No. There are also pagination controls and a 'Number of Results' dropdown set to 25.

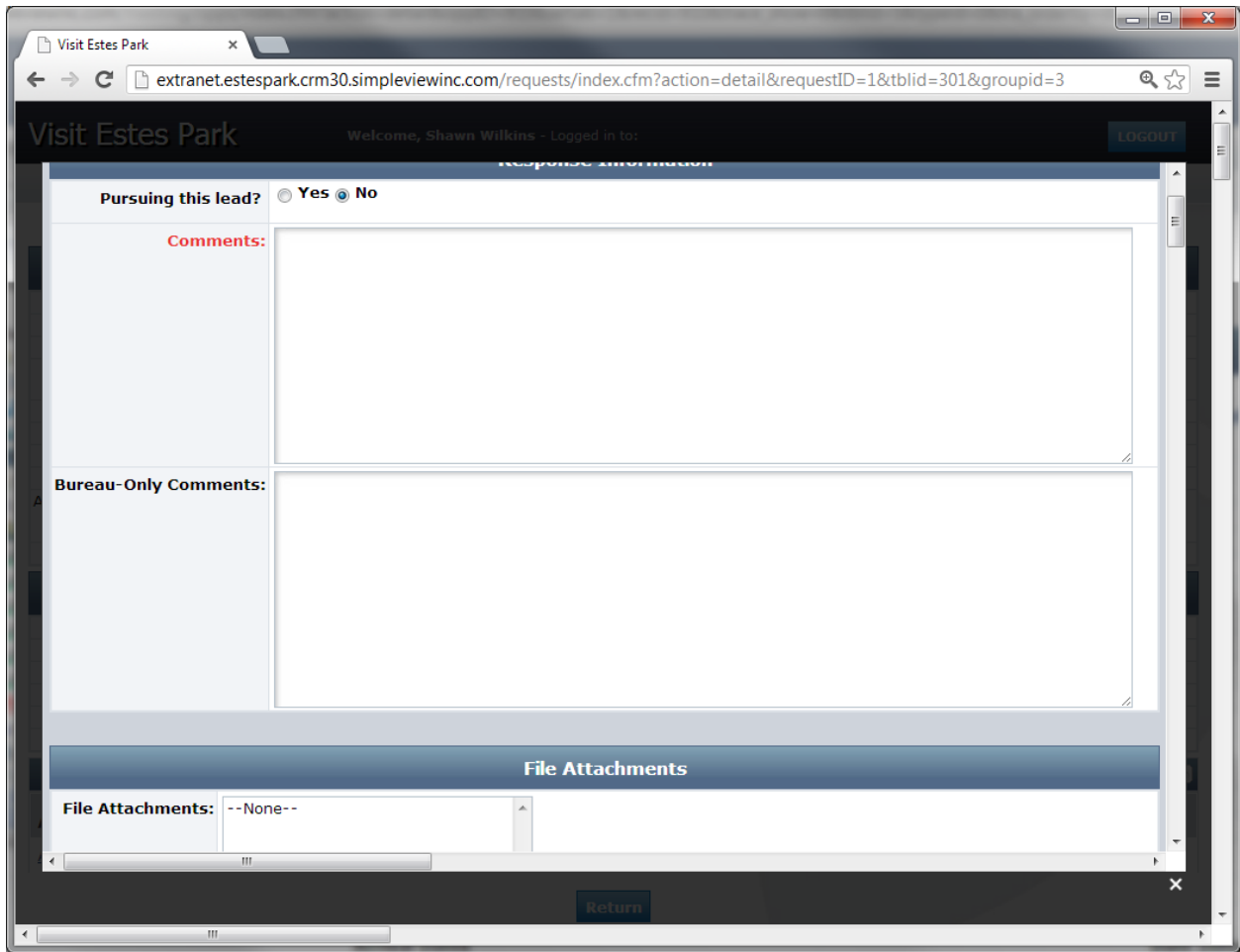
Request Type	Request ID	Service Request	Contact	Lead	Type	Deadline	Status	Responded
Meeting Sales	1	<a href="#">Catering Request for Annual Training Meeting 2013</a>	Joe Smith	simpleview Annual Training Meeting 2013	Catering Request	04/08/2013	New	No

**Viewing & Responding to Service Requests:**

1. Click on the Request ID or Title to open and respond to it
2. Please note the Deadline Date listed is your deadline to be able to respond to the service request on the extranet (or edit your response)
3. If the service request has an attached RFP, it will be located in a field titled "Additional Documentation". Simply click the file name to open/download it.



4. In the bottom left corner you will see an "Add Your Response" or "Edit Your Response" link – click the link to open and respond to this service request
5. Fill in the appropriate information, and click "Save" at the bottom
6. Note that items in red are required fields
7. Bureau Only Comments will only be seen by Visit Estes Park (the client will not see them)



For any questions not detailed in this document regarding the Visit Estes Park extranet, your stakeholder account, or any other questions, please contact Visit Estes Park at any time:

Visit Estes Park  
1200 Graves Avenue  
Estes Park, CO 80517  
970.586.0500

Thank you for your continued partnership with Visit Estes Park!