

TO THE VISIT MISSISSIPPI GULF COAST EXTRANET

<http://extranet.gulfcoast.simpleviewcrm.com/login>

Mississippi Gulf Coast Regional CVB CRM - Extranet



Username:

Password:

Remember Username:

[Forgot Password?](#)

Your e-mail address is your

Username:

Password: you received a generic password when you were set up to receive leads by Extranet. You then selected your own unique password. If you forget your password, you can press of Forgot Password? and one will be sent to you automatically.

Once logged in, you should be looking at a screen similar to this, not all features will be available to all users.

The screenshot shows a web browser window with the URL "extranet.gulfcoast.simpleviewcrm.com/mem/accts/index.cfm". The page title is "Mississippi Gulf Coast Regional CVB CRM - Extranet" and the user is logged in as "Janice Jones, TRP". The page has a navigation menu with tabs: Leads, Member Record, Service Requests, Reports, and Partner Bulletins. The main content area is titled "ACCOUNT DETAIL: MS GULF COAST REGIONAL CONVENTION & VISITORS BUREAU". It contains several sections: "Account Information" with fields for Account ID (8667), Account (MS Gulf Coast Regional Convention & Visitors Bureau), Account (sort) (MS Gulf Coast Regional Convention & Visitors Bureau), Parent (Formerly: MS Gulf Coast CVB Staff), Status (Active), Region (--None--), Email (tourism@gulfcoast.org), and Web Site. "Phone/Fax Numbers" section includes Primary: (228) 896-6699, Toll Free: (888) 467-4853, Alternate, and Fax: (228) 896-6788. "Address Information" section is divided into Physical Address (P O Box 8298, Biloxi, MS 39535-8298, UNITED STATES), Billing Address (UNITED STATES), and Shipping Address (2350 Beach Blvd Ste A, 2nd Floor, Biloxi, MS 39531, UNITED STATES). "Additional Fields" section includes a "General" tab with the text "Reason Membership Cancelled". At the bottom, there are tabs for "Contacts", "Listings", "Web", "Amenities", and "Benefits Summary".

We will be looking at all of the tabs under **Member Record**. Beginning with Contact.

UPDATING CONTACT RECORDS

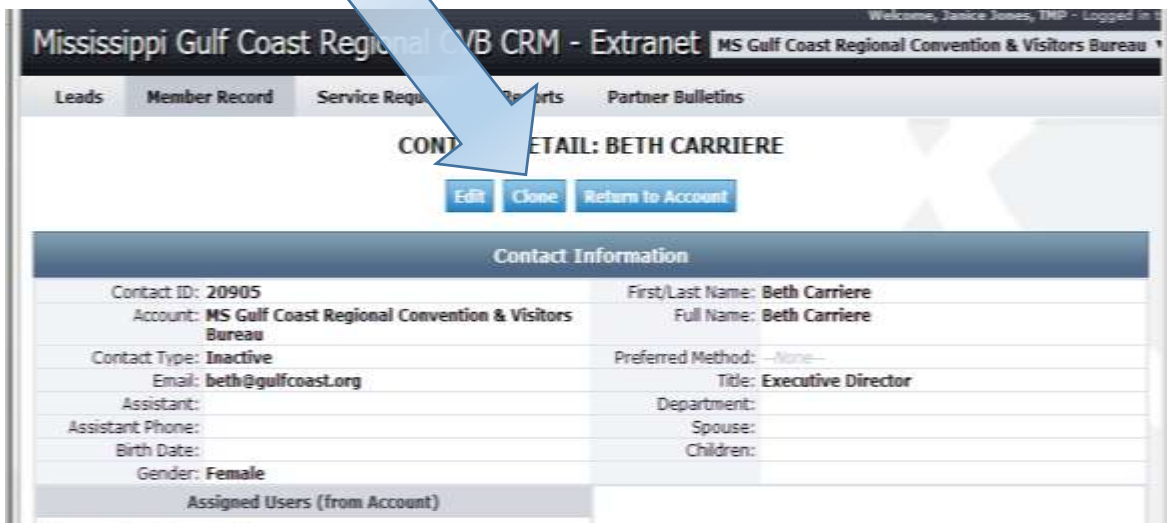
As the administrator of your listings you have access to the contacts we have for your business. Please do not replace a contact name when a position changes. Use the **CLONE** feature and to create the new contact. EXAMPLE:

Beth Carriere leaves her position and Crystal Johnson takes her place. You would **CLONE** Beth Carriere by click on Beth's name,



Action	Contact ID	Contact Name	Title	Email	Phone	Type
	20914	Gary Benson	Sales Manager, Sports Marketing	garyb@gulfcoast.org	(228) 896-6699 x226	Active
	20906	Traci Davis	Executive Administrative Assistant	tracid@gulfcoast.org		Active
	20915	Janet Harrington	Leisure Sales - Group Travel Manager	janeth@gulfcoast.org		Active
	23372	Torva Hurst	Director, Sports Marketing	torveh@gulfcoast.org	(228) 896-6699 x220	Active
	20911	Crystal Johnson	Director of Sales	crystal@gulfcoast.org		Active
	20909	Janice Jones, TMP	Internet/E-Marketing Manager	janicej@gulfcoast.org		Active
	21872	Lori Muller	Administrative/Research Assistant	lorim@gulfcoast.org		Active

then click on CLONE, the replace all of Beth's information with Crystal's information and click Save



Mississippi Gulf Coast Regional CVB CRM - Extranet MS Gulf Coast Regional Convention & Visitors Bureau

Leads Member Record Service Requests Reports Partner Bulletins

CONTACT DETAIL: BETH CARRIERE

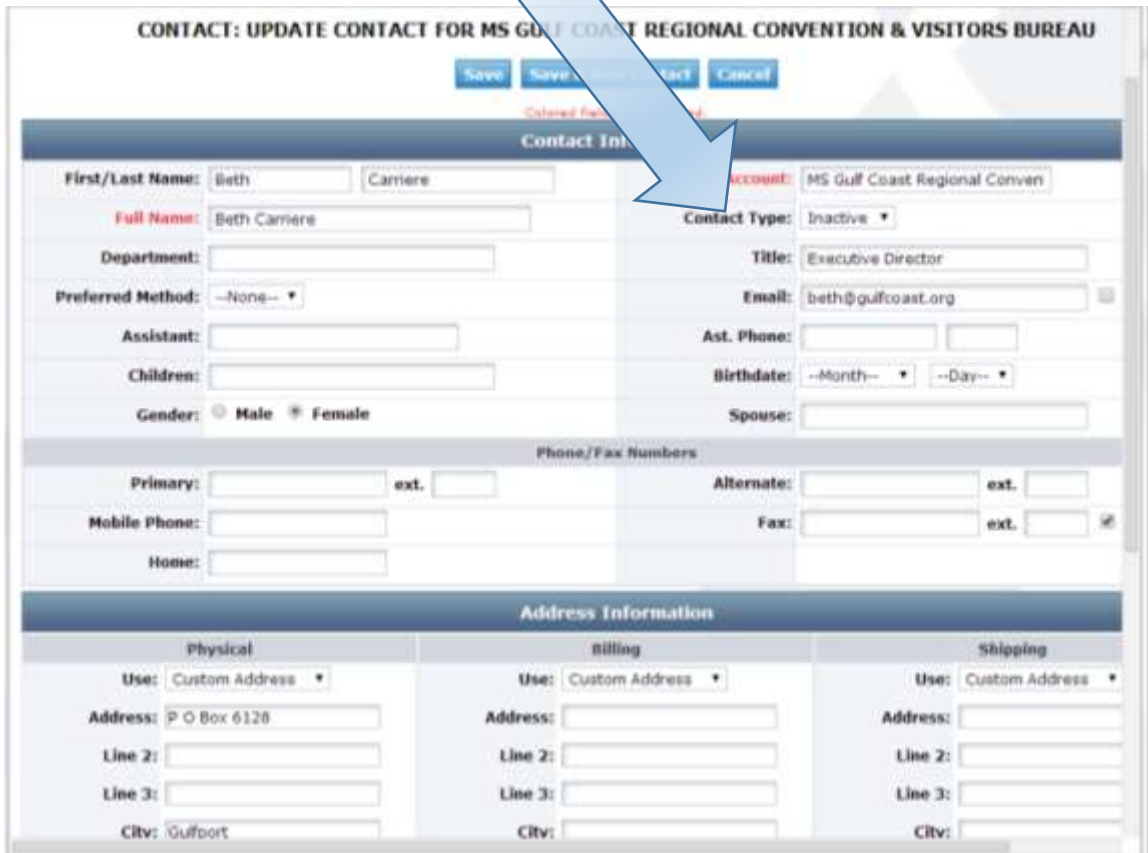
[Edit](#) [Clone](#) [Return to Account](#)

Contact Information

Contact ID: 20905	First/Last Name: Beth Carriere
Account: MS Gulf Coast Regional Convention & Visitors Bureau	Full Name: Beth Carriere
Contact Type: Inactive	Preferred Method: --None--
Email: beth@gulfcoast.org	Title: Executive Director
Assistant:	Department:
Assistant Phone:	Spouse:
Birth Date:	Children:
Gender: Female	

Assigned Users (from Account)

Then open Beth Carriere's record and make her Contact Type Inactive.



CONTACT: UPDATE CONTACT FOR MS GULF COAST REGIONAL CONVENTION & VISITORS BUREAU

Save Save as New Contact Cancel

Colored fields are required.

Contact Information

First/Last Name: beth Carriere	Account: MS Gulf Coast Regional Convent
Full Name: Beth Carriere	Contact Type: Inactive
Department:	Title: Executive Director
Preferred Method: --None--	Email: beth@gulfcoast.org
Assistant:	Ast. Phone:
Children:	Birthdate: --Month-- --Day--
Gender: <input type="radio"/> Male <input checked="" type="radio"/> Female	Spouse:

Phone/Fax Numbers

Primary: ext.	Alternate: ext.
Mobile Phone:	Fax: ext.
Home:	

Address Information

Physical	Billing	Shipping
Use: Custom Address	Use: Custom Address	Use: Custom Address
Address: P O Box 6128	Address:	Address:
Line 2:	Line 2:	Line 2:
Line 3:	Line 3:	Line 3:
City: Gulfport	City:	City:

This preserves the integrity of our database and allows a brand new start for the new sales person and all of the appropriate leads and communications will be sent to the proper person at your business.

LISTING UPDATES:

ALL LISTINGS ARE SUBJECT TO EDITING BY THE CVB. WHEN YOU MAKE CHANGES/ADDITIONS THEY WILL BE FLAGGED AS PENDING IN OUR DATABASE AND DO NOT GO LIVE UNTIL STAFF APPROVES THE LISTING.

When the screen comes up the Member Record (upper left-hand corner, tab 2) tab should be highlighted. From here you have access to Contacts, Listings, Web, Amenities and Benefits Summary (Bottom left-hand side of the screen. Click on Listings.



All of the listings associated with your business will be found here. To edit your listing, click on the pencil. To view your listing click on either the Listing ID or Type. In the example below, I clicked on Listing ID.



Here you can see what your listing looks like, where it can be found on gulfcoast.org, the name of the master account, who the contact person is to update this listing and the county in which the business is located.

CATEGORY: is the section where the listing can be found: A business that provides Shopping would have a category of shopping and then a **SUBCATEGORY** that further describes the type of shopping: Boutique, art gallery, Shopping Center, etc. If the business reasonably falls into another category, that might be selected as well, Gulfport Premium Outlets would fall under Outlet Shopping but would all fall under Shopping Center. Please let us know if you feel your listing category/subcategory needs to be updated.

Listing Details			
Field	Overwrite?	Account Value	Overwrite with...
Company:	<input checked="" type="checkbox"/>	MS Gulf Coast Regional Convention & Visi	The Little Room
Company (sort):	<input checked="" type="checkbox"/>	MS Gulf Coast Regional Convention & Visi	The Little Room
Address Line 1:	<input checked="" type="checkbox"/>	P O Box 8298	If another address needs to be used
Address Line 2:	<input type="checkbox"/>		
Address Line 3:	<input type="checkbox"/>		
City:	<input checked="" type="checkbox"/>	BiLoxi	The City
State:	<input checked="" type="checkbox"/>	MS	The State
Zip:	<input checked="" type="checkbox"/>	39535-8298	Zip
Country:	<input type="checkbox"/>	UNITED STATES	
Email:	<input checked="" type="checkbox"/>	tourism@gulfcoast.org	Maybe the e-mail is different
Web Site:	<input checked="" type="checkbox"/>		and they have an individual web address
Primary Phone:	<input checked="" type="checkbox"/>	(228) 896-6699	Another phone
Alternate Phone:	<input checked="" type="checkbox"/>		alternate phone
Fax:	<input type="checkbox"/>	(228) 896-6788	
Toll Free:	<input type="checkbox"/>	(888) 467-4853	

These changes allow you to have more than one listing under an account but display under the proper names on gulfcoast.org. Most of you will be able to skip this step completely. I will almost always be available for questions and to assist you.

Next is **Website Notifications** which you won't really NEED to do since you have access to your Benefits Summary but you are more than welcome to set yourself to receive e-mail notifications when your listing receives a certain number of hits from our web site.

Website Notifications	
Email To Notify	<input type="text"/>
(You can add multiple email addresses by separating them by semi-colons) (Example: joe@msn.com;fred@aol.com;...)	
Interval:	<input checked="" type="radio"/> Never <input type="radio"/> Every 250 Hits <input type="radio"/> Every 500 Hits <input type="radio"/> Every <input type="text" value="0"/> Hits

Colored Fields are Required

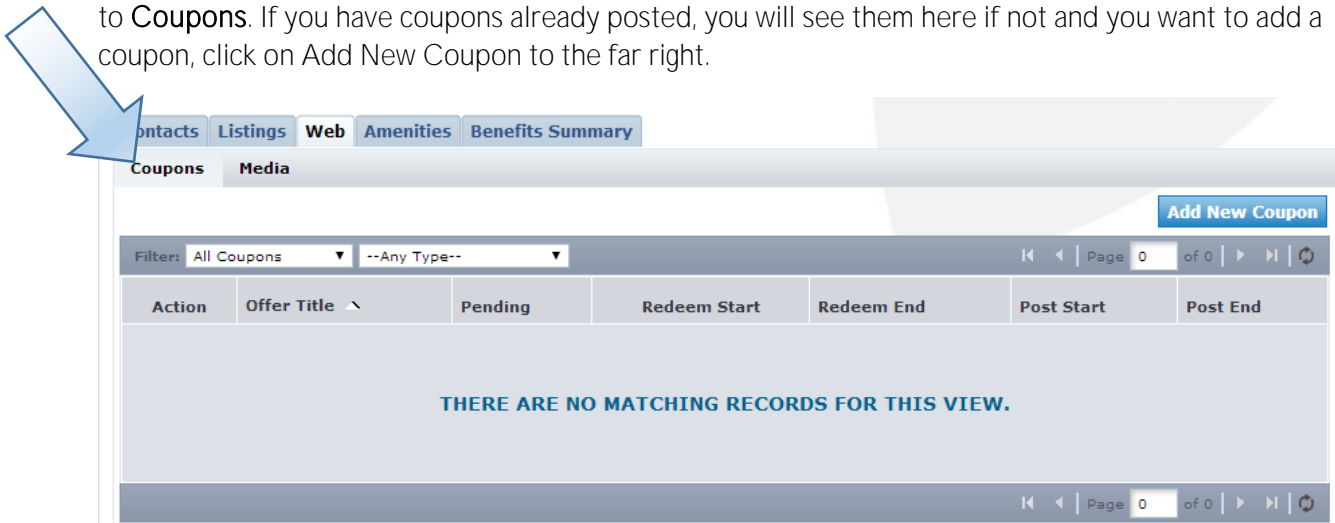
Save Cancel

Click Save and then click on Return to Account.

ADDING COUPONS AND PICTURES/IMAGES:

ALL COUPONS ARE SUBJECT TO EDITING BY THE CVB. WHEN YOU MAKE CHANGES/ADDITIONS THEY WILL BE FLAGGED AS PENDING IN OUR DATABASE AND DO NOT GO LIVE UNTIL STAFF APPROVES THE COUPON.

Click on Web, you will see 2 new tabs **Coupons** and **Media**. Clicking on Web automatically brings you to **Coupons**. If you have coupons already posted, you will see them here if not and you want to add a coupon, click on Add New Coupon to the far right.



You should be looking at this coupon screen.

The screenshot shows the 'New Coupon' form in the CRM system. The form title is 'COUPON: NEW COUPON FOR MS GULF COAST REGIONAL CONVENTION & VISITORS BUREAU'. At the top, there are three buttons: 'Save', 'Save & New Coupon', and 'Close'. Below the buttons, there is a red error message: 'Critical fields are required'. The form is divided into two main sections: 'Coupon Information' and 'Coupon Image'. The 'Coupon Information' section has three input fields: 'Offer Title', 'Offer Link', and 'Offer Text'. The 'Coupon Image' section has a dropdown menu and a 'Selected Image' field.

Offer Title is the name of your offer. Short and sweet is best. **Offer Link**: do you have a place on your web site that gives greater detail about the offer? This is where put that link.

Offer Text: this is the meat of your offer. Again, short and sweet is best but include as much information as necessary. What the offer is exactly, exclusions, management reserves all the rights, age restrictions, etc. **Don't worry about dates in the actual offer that comes next.**

Redeem From: is the start date of the offer and **Redeem To:** is the end date of the offer. So if you want your offer to run from April 1 to May 31, those are the dates you use. When you click in the date box, a calendar drops down so you can select your date (you may manually type in the date if you wish).

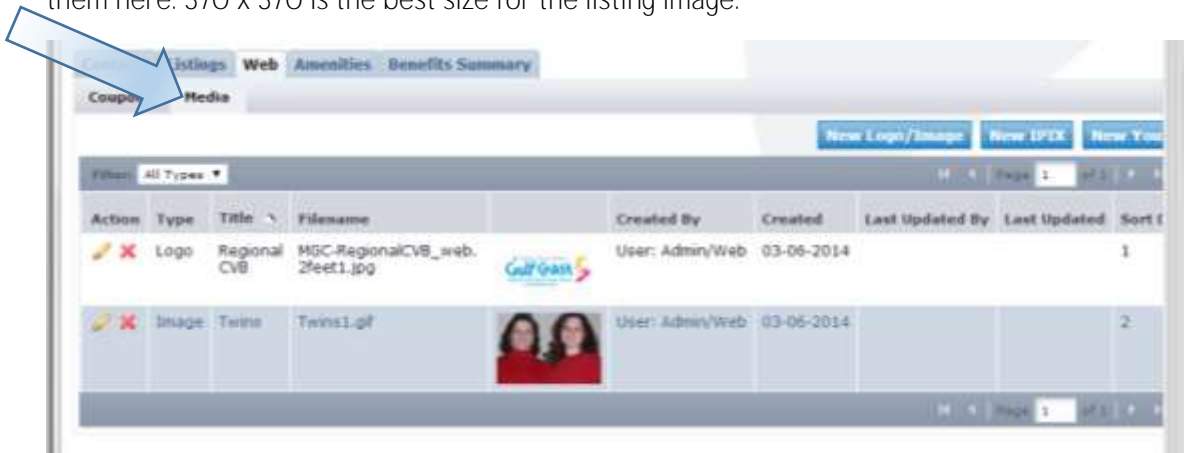
Post From: is when you want the coupon to start displaying on the web site. If you offer begins April 1 you might want it to post beginning March 15 so people planning their trips can use the offer after arriving. **Post To:** is the last day you want the offer displayed, typically the last day of the offer.

Coupon Categories: Highlight the category that fits your listing and then click on the second circle, this should move your selection to the right. This determines where your coupon displays on the coupon page, gulfcoast.org/coupons.

Add to Listing(s): If you have more than one listing you select the listing you want the coupon attached to by checking the box in front of the coupon.

SAVE.

ADDING IMAGES: Click on Web, if we already have images from your listing or coupons you will see them here. 370 x 370 is the best size for the listing image.



If you simply need to change out an image or logo, click on the pencil and upload a new image. It will replace the existing one. Since none of your edits go live until approved by staff, you can always e-mail the image you wish to use for staff to include when approving the coupon.

MEDIA: UPDATE MEDIA FOR {0}

Colored fields are required.

Media Information

Type: Logo

Title:

Upload Logo: No file chosen
(Leave field blank to keep existing file)
Image size should be 250 x 150

Current Logo:

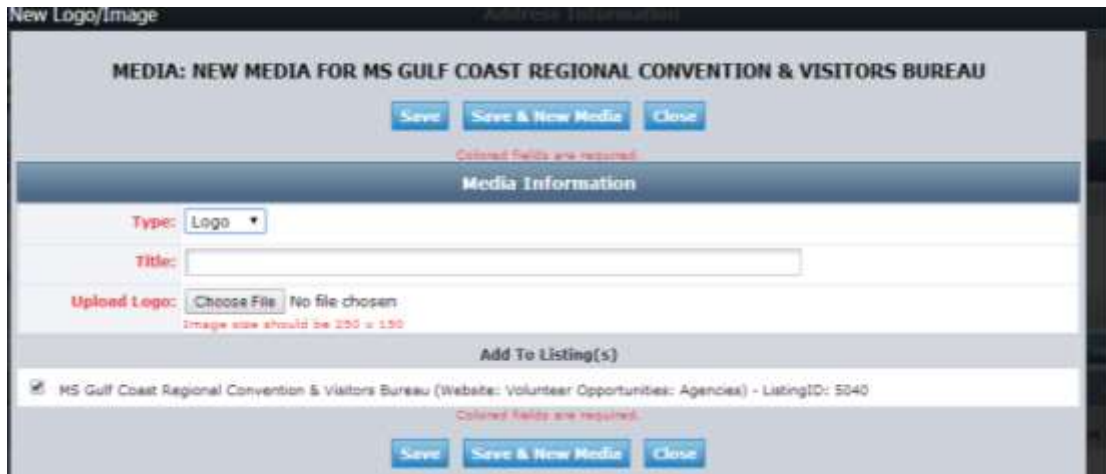


Add To Listing(s)

MS Gulf Coast Regional Convention & Visitors Bureau (Website: Volunteer Opportunities: Agencies) - ListingID: 5040

Colored fields are required.

If you need to upload a new image, click on the **New Logo//Image** button. Type in the title of your image, use the Choose File button to navigate to where your image is located and upload. PLEASE NOTE THE SUGGESTED SIZE OF IMAGES IS 370 x 370. AGAIN Since none of your edits go live until approved by staff, you can always e-mail the image you wish to use for staff to include when approving the coupon.



Click save and your image has been uploaded. If you have more than one listing, you will need to make sure the proper listing is checked for that image to be associated with.

AMENITIES: Applies to lodging, restaurants, charter fishing and meeting properties. Select which applies to your business, if any, and click yes or no or fill in the blanks.



Benefits Summary: Here you can see the activity for your account. Mostly Leads, Article were instrumental in getting written that mentioned your property, Web Site and Coupon Hits. Just click on the tab for the information.



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I am your contact for all things related to the extranet and look forward to working with you.



Janice Jones

CRM/CMS Manager

Visit Mississippi Gulf Coast

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Biloxi, MS 39531

228-388-1431; 1-888-467-4853 ext. 2210

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