

MCCVB Extranet Training Manual

Introduction to the Extranet

When you become an Empowered or TID member of the Monterey County Convention and Visitors Bureau your primary contact will be setup with access to all sections of the Member Extranet. The main focus of this online system is for members to manage their listing information for www.SeeMonterey.com, review and respond to Meeting Sales Leads, Service Requests and Media/PR Leads. Members can also submit Special Offers for visitors to access, access Reports and the Convention Calendar.

This manual includes information on each section of the Extranet and how you can maintain your business information to capitalize on membership benefits. The Member Extranet can be accessed from various locations in the Members portion of www.SeeMonterey.com; from the main Members page, the Member Toolkit section and the left side navigation of all member site pages. It can also be accessed directly at <http://www.seemonterey.com/members/tools/login/>.

The screenshot shows the 'MEMBERS' section of the website. On the left, a vertical menu lists various options: JOIN THE CVB, ADVERTISING OPPORTUNITIES, MEMBERSHIP CALENDAR, MEMBER NEWSLETTER, MEMBER TOOLKIT (highlighted with a red box), MCCVB TEAM, BOARD OF DIRECTORS & COMMITTEES, and SUBMIT AN EVENT. Below this menu is an 'Extranet Login' button (highlighted with a red box) and a brief description: 'Login to the Member Extranet to update your website listings and submit special offers.' To the right of the menu is a large image of Cannery Row in Monterey, featuring a prominent sign for 'MONTEREY CANNING CO.' and the caption 'Cannery Row, Monterey'. Below the image are social media sharing icons for Facebook, Pinterest, and Share. Further down, the 'MEMBERS' section is repeated, with a 'Members Only Portal' button (highlighted with a red box) and a description: 'Login to the Member Extranet to update your web listings, access group sales and services leads and access member only reports like the convention calendar. Login Now!'. At the bottom right of the screenshot, the URL 'seemonterey.com' is visible.

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

Big Sur | Carmel-by-the-Sea | Carmel Valley | Del Rey Oaks | Marina | Monterey
Moss Landing | Pacific Grove | Pebble Beach | Salinas | Salinas Valley | Sand City | Seaside

seemonterey.com
p | 800.555.6290 | 831.657.6400
f | 831.648.5373

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Monterey, CA 93940

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How to Access

As noted in the introduction, there are multiple ways to access the login page for the Member Extranet. Once on the Login page there is a description of what the extranet is and contact information to request training. Beneath that is the actual login box to enter your email and password.

First Login

When setup for the extranet you receive an email with a temporary password. Upon first login you are able to set a personalized password for future use. If you forget your password, use the *Forgot Password* link to reset or contact a member of the MCCVB staff for assistance.

Partner Login
Username:
kimberly@seemonterey.com
Password:
.....
Login
Forgot Password
*Your username is your e-mail address.

- Leads
- Member Record
- Occupancy
- Service Requests
- Reports
- Partner Bulletins
- Logout

Once you are successfully logged into the system you will see a series of links for each section of the Member Extranet. Simply click the link for the section you wish to access, to update listing information select the option for Member Record.

System Requirements and Troubleshooting

The MCCVB Extranet system will only function properly on the two most recent versions of the top web browsers. To avoid lapses in functionality be sure to keep your browser up to date. You can check what version you have and see if there are updates by going to the menu on your browser and selecting the *About* option.

If you do experience system issues and upgrading your browser will not work please try clearing your history and cached pages. You may also need to have your IT department adjust other security settings or update java settings. If you need assistance please contact a member of the MCCVB team.

Member Record

The Member Record section of the Extranet is where members can update content pertaining to their business listing on www.SeeMonterey.com. Sections within the Member Record that members can edit are Contacts, Listings, Web Media and Coupons, Social Media, Amenities and Meeting Space information. It is the responsibility of the member to be certain their content is up to date in these sections and edit as needed. Only member contacts with the Update Member Record security setting are able to access the Member Record. Sections the MCCVB manages are the basic Account Details and the Benefits Summary.

Account Detail

The Account Detail section of the Member Record is the basic member information submitted when signing up as a member with the MCCVB. Data in the top three sections will be displayed on your member listing detail page on the MCCVB website and the Additional Fields section is for internal tracking purposes. The Account Detail section can only be edited by MCCVB staff; if changes are needed please contact David Marzetti, Membership Manager at 831-657-6418 or David@seemonterey.com.

Under Additional Fields, the TID partner Yes/No classifies whether a not the member is part of a lodging facility that participates in the Tourism Improvement District and does not have membership dues. The Jurisdiction field classifies the funding entity the member belongs to, whether it be the physical city or unincorporated parts of the county.

Leads	Member Record	Occupancy	Service Requests	Reports	Partner Bulletins
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ACCOUNT DETAIL: MONTEREY COUNTY CONVENTION & VISITORS BUREAU

Account Information		
Account ID: 436		Status: Active
Account: Monterey County Convention & Visitors Bureau		Region: Monterey
Account (sort): Monterey County Convention & Visitors Bureau		Email:
Parent:		Web Site: http://www.seemonterey.com
Formerly:		

Phone/Fax Numbers	
Primary: (831) 657-6400	Alternate:
Toll Free: (800) 555-6290	Fax: (831) 648-5373

Address Information		
Physical Address	Billing Address	Shipping Address
787 Munras Ave Ste 110 Monterey, CA 93940 UNITED STATES	PO Box 1770 Monterey, CA 93942 UNITED STATES	PO Box 1770 Monterey, CA 93942 UNITED STATES

Additional Fields	
General	
TID Partner: No	Jurisdiction: Monterey

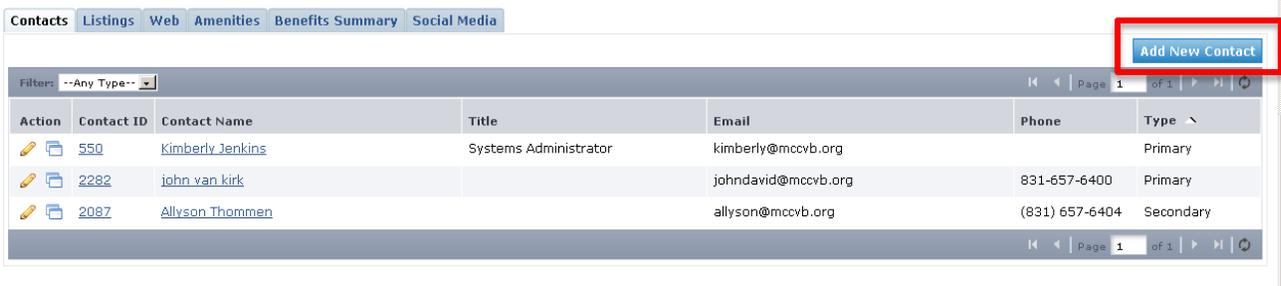
When a user scrolls to the bottom of the Member Record page they will see a series of tabs on the left side. These are the sections members have access to edit, with the exception of

the Benefits Summary (managed by MCCVB). Please review the instructions for each section in this manual to learn how to update your content.



Contacts

The Contacts section is where the Primary user can add their team members to the system. They have access to *Add new*, *Edit* and *Deactivate* existing contacts. *Deleting* contacts and setting *Security Access* for users must be handled by the MCCVB. To add new contacts click the blue *Add New Contact* button on the right side.



When the page loads, type in the *First* and *Last* names then hit the Tab key the *Full Name* field will auto populate. Please enter the remaining desired contact information for the user; all fields in red font are required. Please also make sure the *Send* box is checked so the user can receive emails from the system.

When completing the *Phone/Fax* fields, you only need to add the numbers, once you click the Tab key or in a new field they will automatically format with () and -. If the number has an extension please use the *Ext* field instead of adding in the main number field. Once complete click the *Save* button.

In the *Address Information* fields you can select to use the main account addresses in the *Use* drop down fields. If the Contact address is different, select the option for *Custom Address* and enter the details.

The screenshot shows the 'Address Information' form with three columns: Physical, Billing, and Shipping. Each column has a 'Use' dropdown menu, an 'Address' field, 'Line 2' and 'Line 3' fields, a 'City' field, and 'State/Province', 'Zip/Postal Code', and 'Country' fields. A red arrow points to the 'Use' dropdown in the Physical column.

To *Edit* or *Deactivate* an existing Contact click on the *Pencil* icon next to their name or click the *Name* and when the page loads click the *Edit* button.

The screenshot shows a table of contacts with columns: Action, Contact ID, Contact Name, Title, Email, Phone, and Type. A red arrow points to the pencil icon in the Action column for the first contact, Kimberly Jenkins.

Action	Contact ID	Contact Name	Title	Email	Phone	Type
	550	Kimberly Jenkins	Systems Administrator	kimberly@mccvb.org		Primary
	2282	John van Kirk		john david@mccvb.org	831-657-6400	Primary
	2087	Allison Thommen		allyson@mccvb.org	(831) 657-6404	Secondary

When the *Contact* screen opens you can edit the necessary fields and click *Save*. To *Deactivate* the contact, edit the *Contact Type* field to *Inactive* and click *Save*. This will eliminate the users access to the system and ability to receive emails but will keep the history associated to the. If you wish to delete a user please contact the MCCVB.

The screenshot shows the 'Contact Information' form with fields for First/Last Name, Full Name, Department, Preferred Method, Assistant, Children, Gender, Title, Email, Ast. Phone, Birthdate, Spouse, Primary, Cell, Home, Alternate, and Fax. A red arrow points to the 'Contact Type' dropdown menu.

Security Access

Once all users have been added or updated, please contact Kit Franke at 831-657-6401 or Kit@seemonterey.com to set their security access. This is a step that can only be set by staff of the MCCVB; your additional contacts will not be able to edit listing information or access leads until we have set them up. Each level to choose from is described here, be sure to let us know the specific settings when requesting access.

- **Extranet Access Enabled:** Will allow user access to the member extranet. If the contact will need access to any of the sections below this should be a yes. If they do not need to use the system this should be selected as No.
- **Update Member Records:** Will allow user to update Listings, Amenities, Social Media links, add Contacts, upload Media files and Coupons, as well as view the Benefits Summary. See additional Member Record access levels for more details.
- **Sales Lead Catcher:** Will allow user to receive notification emails of new Meeting Sales and Tour & Travel leads, access any lead sent through the system and assign them to a Sales Lead Contact to respond.
- **Sales Lead Contact:** Will allow user to access the Meeting Sales section of the extranet and respond to leads that have been assigned to them by the Lead Catcher.
- **Tour Lead Contact:** Will allow user to access the Tour & Travel section of the extranet and respond to leads that have been assigned to them by the Lead Catcher.
- **Media Lead Contact:** Will allow user to access any Media requests or content posted by our Communications Department.
- **Service Request Contact:** This will be the person who would receive and respond to Service Lead Requests when sleeping rooms are not included.
- **View Reports:** Will allow contact to review reports like the Convention Calendar that are loaded into the Extranet.
- **Receive Membership Invoices:** This will be the person who should receive and respond to all invoices from the MCCVB.

If the Update Member Record level is set to Yes a user's access to specific sections can be restricted in the Member Record Access options.

- **Member Record Contact Access:** Will allow user to add new contacts and edit existing contacts.
- **Member Record Listing Access:** Will allow user to update Listing descriptions.
- **Member Record Coupon Access:** Will allow user to submit Special Offers.
- **Member Record Media Access:** Will allow user to upload images and YouTube videos.
- **Member Record Amenity Access:** Will allow user to edit Amenities displayed on the account.
- **Member Record Benefits Summary Access:** Will allow user to view website hits, lead reports and additional info.

Listings

Listings are the member records that are displayed on www.SeeMonterey.com with detailed information on your business. You are able to create *up to five listings* for the different business categories you identify with. These records are the responsibility of the member to maintain and update content as needed through the Member Extranet. To enhance your business listing please review the Coupons, Media, Amenities and Social Media sections of the user manual.

Where to Submit a Listing

Member contacts with a security setting of *Update Member Records* have the ability to enter listings through the MCCVB Member Extranet. Once signed in, the page should default to the *Member Record* section. Scroll towards the bottom of the page under the Additional Fields section until you see a series of tabs on the left side, then select the tab titled *Listings*.



How to Submit a Listing for Approval

When the *Listings* section loads, click the blue button that says *Add New Listing* on the right side of the page. A window will open for you to enter the *Listing Information* in which all required fields are in red.



In the *Type* field select *SeeMonterey.com*, then select the *Category* and *Sub-category* you wish to be listed under. Enter your business description in the *Listing* box, link to the *Account Address* and associate a *Contact* to manage the listing.

LISTING: NEW LISTING FOR MONTEREY COUNTY CONVENTION & VISITORS BUREAU

Save Cancel

Colored fields are required.

Listing Information

Type: --Choose One--

Company: Monterey County Cor

Category: --Please choose Type first--

SubCategory: --Please choose Category first--

Contact: --None--

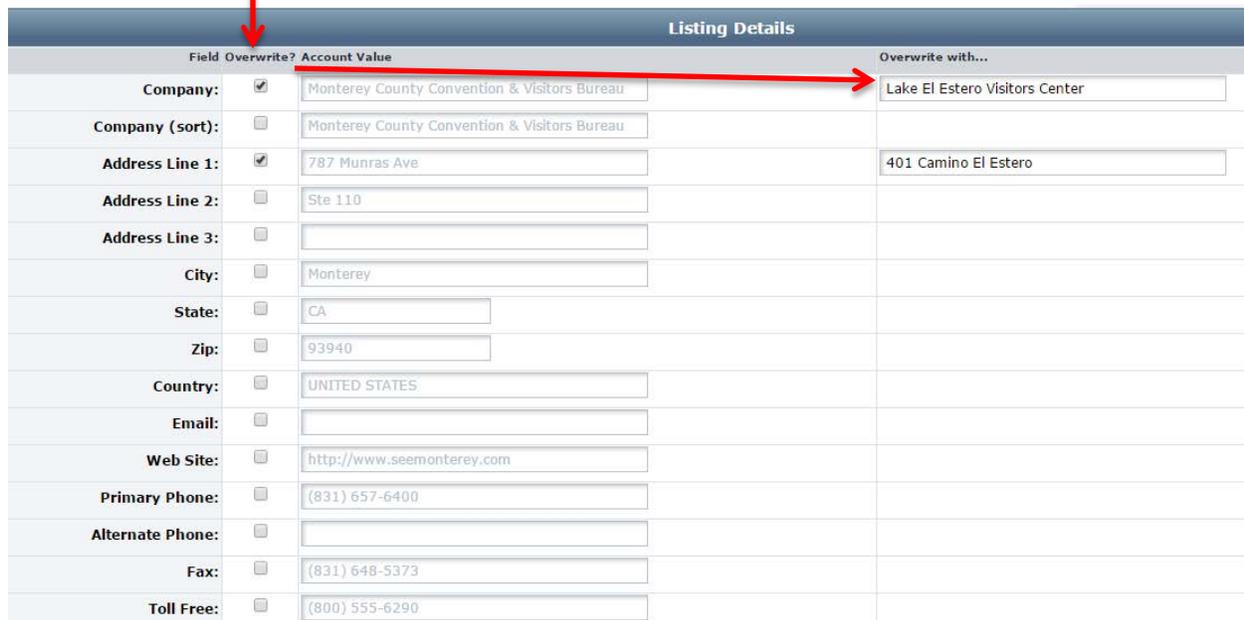
Address Type: --Custom Address--

Listing:

In the *Listing Details* section you can overwrite any of the *Account Information* to be displayed. Simply check the box next to the item you would like to update and enter the new value in the field that opens in the right hand column.

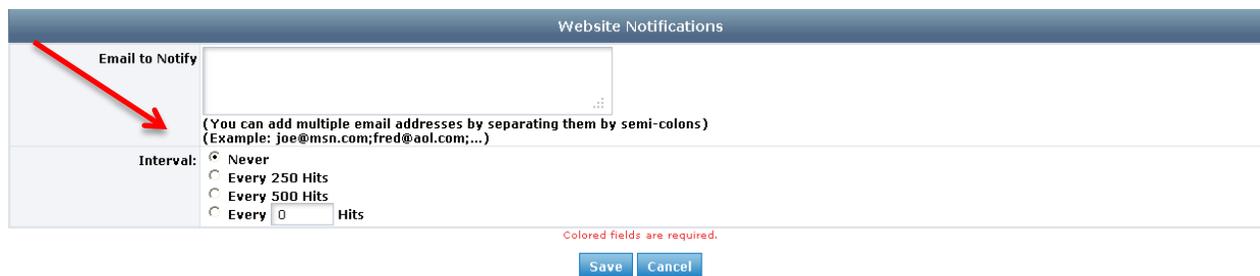
MONTEREY

Monterey County Convention & Visitors Bureau



	Field Overwrite?	Account Value	Overwrite with...
Company:	<input checked="" type="checkbox"/>	Monterey County Convention & Visitors Bureau	Lake El Estero Visitors Center
Company (sort):	<input type="checkbox"/>	Monterey County Convention & Visitors Bureau	
Address Line 1:	<input checked="" type="checkbox"/>	787 Munras Ave	401 Camino El Estero
Address Line 2:	<input type="checkbox"/>	Ste 110	
Address Line 3:	<input type="checkbox"/>		
City:	<input type="checkbox"/>	Monterey	
State:	<input type="checkbox"/>	CA	
Zip:	<input type="checkbox"/>	93940	
Country:	<input type="checkbox"/>	UNITED STATES	
Email:	<input type="checkbox"/>		
Web Site:	<input type="checkbox"/>	http://www.seemonterey.com	
Primary Phone:	<input type="checkbox"/>	(831) 657-6400	
Alternate Phone:	<input type="checkbox"/>		
Fax:	<input type="checkbox"/>	(831) 648-5373	
Toll Free:	<input type="checkbox"/>	(800) 555-6290	

You can also set up an email notification for when your listing receives a given number of views from www.SeeMonterey.com. Simply enter the preferred email address and set the interval then click Save.



Website Notifications	
Email to Notify	<input type="text"/>
<small>(You can add multiple email addresses by separating them by semi-colons) (Example: joe@msn.com;fred@aol.com;...)</small>	
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
<small>Colored fields are required.</small>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

When will my listing appear on www.SeeMonterey.com?

Once a Listing is submitted the MCCVB is alerted to review and approve the record. MCCVB staff will inform you of the *Approval* or *Denial* status of your Listing submission once reviewed. Please allow for one to two business days for review and approval. When approved, your listing will be shown on the directory pages for the categories selected.

Web

The Web section is where members can enter Coupons and Special Offers for visitors to access, as well as upload logos, images and YouTube videos to the Media section to be displayed on the member business listing on www.SeeMonterey.com.

What are Coupons?

The Coupons module is for members to enter information for deals and special offers they would like to advertise on www.SeeMonterey.com for visitors, meeting planners or meeting attendees. The offers will be posted to the partner listing detail page, the main [Special Offers](#) page and potentially pages dedicated to the specific offer category. In addition to being posted on the website, visitors also have the capability to download and print the coupons to use at member businesses.

Where to Submit a Coupon

Member contacts with a security setting of Update Member Records have the ability to enter coupons through the MCCVB Member Extranet. Once signed in, the page should default to the *Member Record* section. Scroll towards the bottom of the page under the Additional Fields section until you see a series of tabs on the left side. Select the tab titled *Web* and the sub section for *Coupons*.



How to Submit for Approval

When the Coupon section loads, click the blue button that says *Add New Coupon* on the right side of the page. A window will open for you to enter the *Coupon Information* including the Offer Title (required field), website to link to and description of offer details and any restrictions that may apply.

A screenshot of the 'NEW COUPON' form interface. The title bar reads 'COUPON: NEW COUPON FOR MONTEREY COUNTY CONVENTION & VISITORS BUREAU'. Below the title bar are three buttons: 'Save', 'Save & New Coupon', and 'Close'. A red message states 'Colored fields are required.' Below this is a section titled 'Coupon Information' with three input fields: 'Offer Title:' (a required field), 'Offer Link:', and 'Offer Text:' (a large text area). The 'Offer Title' field is highlighted with a red border.

You can also link an image to the offer in the *Coupon Image* section. Use the drop down to select one of the images loaded to your Media Gallery. There are two sets of dates to complete when entering a Coupon. The *Redeem From* and *Redeem To* dates should be set

for the dates the coupon can be used at the business. The *Post From* and *Post To* dates are for when you would like the offer to be shown on www.SeeMonterey.com.

Coupon Image

untitled1.png
 untitled111.png
 untitled1.png

Selected Image:



Coupon Dates

Redeem From: Redeem To:
 Post From: Post To:

Select the *Categories* your offer most closely represents to be displayed under on the Special Offers page. If you wish to offer to meeting attendees as well as leisure visitors select the corresponding Flash Your Badge option. To do so, simply click the option in the box titled *Available* and then click the arrow pointing to the right to add to the *Selected* box.

Coupon Categories

Available

- Golf
- Meetings Planner Offers
- Hotels
- Local Events
- Flash Your Badge Shopping Offers
- Flash Your Badge Dining Offers
- Flash Your Badge Activity Offers

Selected

- Activities
- Food and Wine

If you have setup multiple listing categories you can select which ones your coupon should be displayed on under the Add To Listing(s) section. Please Note: you have to select at least one listing for the coupon to display on the Special Offers page. Once your information is complete, click Save to submit the offer for approval.

Add To Listing(s)

Monterey County Convention & Visitors Bureau (SeeMonterey.com: Visitor Services: Visitor Centers)

Monterey County Convention & Visitors Bureau (SeeMonterey.com: Meeting Services: Event/Meeting Planners)

Colored fields are required.

Save Save & New Coupon Close

When will my Coupon appear on www.SeeMonterey.com?

Once a Coupon is submitted, the MCCVB is alerted and will review and approve the offer. MCCVB staff will inform you of the approval or denial status of your coupon submission. Please allow for one to two business days for review and approval. When approved, your coupon will be shown on the specials page of www.SeeMonterey.com/special-offers.

What is Media?

The *Media* module is for members to upload logos, images, YouTube Videos and IPIX files they would like to show on their business listing for visitors to access.

Where to Upload Media Files

Member contacts with a security setting of Update Member Records have the ability to upload Media through the MCCVB Member Extranet. Once signed in, the page should default to the Member Record section. Scroll towards the bottom of the page under the Additional Fields section until you see a series of tabs on the left side. Select the tab titled Web and the sub section for Media.

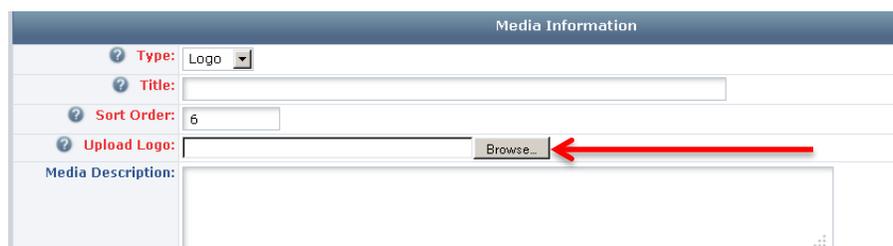


How to Submit a Media File

When the *Media* page loads, click the blue button on the right side for the media file type you would like to upload.



For a New Logo/Image select the type, enter a title and browse your computer to upload the file. The standard file sizes are 200x150 for the thumbnail image and 640x480 on the listing detail page.

A screenshot of the 'Media Information' form. The form has a dark blue header with the text 'Media Information'. Below the header, there are several input fields: 'Type' (a dropdown menu set to 'Logo'), 'Title' (a text input field), 'Sort Order' (a text input field with the value '6'), and 'Upload Logo' (a text input field with a 'Browse...' button next to it). A red arrow points to the 'Browse...' button. At the bottom, there is a 'Media Description' field, which is a large text area.

If you have multiple listings, you can select which specific ones the image will be displayed on by checking the box next to the name in the *Add To Listings* section. If you only want the images to be available for a Coupon do not check a box to add to a listing.

Add To Listing(s)

Monterey County Convention & Visitors Bureau (SeeMonterey.com: Visitor Services: Nonprofit Associations)

Monterey County Convention & Visitors Bureau (SeeMonterey.com: Conference and Wedding Services: Event/Meeting Planners)

Monterey County Convention & Visitors Bureau (SeeMonterey.com: Visitor Services: Concierge Services)

Once you load your file you will see a preview of it on the main media screen, as well as icons to edit (*pencil*) or delete (*red x*) the file in the Action column. If your file needs to be resized, you will also see an icon of a blue rectangle. This will open the Media Resize tool where you can resize the image to match the standard size, or make a thumbnail image for the listings results page.

Action	Type	Title	Filename	Created By	Created	Last Updated By	Last Updated	Sort Order
 	Logo	MCCVB Logo	MCCVB-logo0.jpg	Admin/Web	02/17/2012			0

Action

Resize Media

Current Main Image							
Image	Width	Height	Global Width Setting	Global Height Setting	Current Selection Width	Current Selection Height	
001_1.JPG	2100	1399	640	480			

Full Image

The screen for uploading a New IPIX is the same except the type is already selected as IPIX. An IPIX file depicts a 360 degree view and is often used by hotels to show off meeting space and guest rooms.

MEDIA: NEW MEDIA FOR MONTEREY COUNTY CONVENTION & VISITORS BUREAU

Colored fields are required.

Media Information

Type: IPIX

Title:

Upload IPIX:

The screen for uploading a YouTube video is slightly different. Instead of browsing your computer for the file to upload you will need to insert the link to the video on a YouTube account. As with images, please select which listing you would like to add the video to if you have multiple category options. If none are selected the video will not display on any of your listings on Seemonterey.com.

MEDIA: NEW MEDIA FOR MONTEREY COUNTY CONVENTION & VISITORS BUREAU

Colored fields are required.

Media Information	
Type:	YouTube
Title:	<input style="width: 90%;" type="text"/>
YouTube Link:	<input style="width: 90%;" type="text"/>

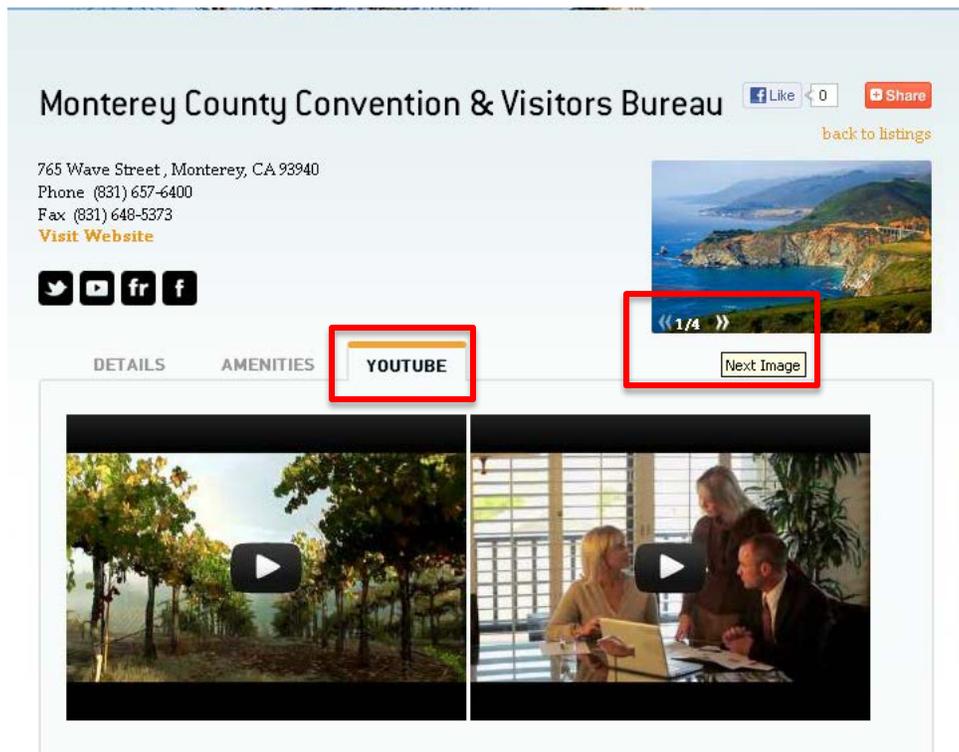
Add To Listing(s)

- Monterey County Convention & Visitors Bureau (SeeMonterey.com: Visitor Services: Nonprofit Associations)
- Monterey County Convention & Visitors Bureau (SeeMonterey.com: Conference and Wedding Services: Event/Meeting Planners)
- Monterey County Convention & Visitors Bureau (SeeMonterey.com: Visitor Services: Concierge Services)

Colored fields are required.

When will Media appear on my listing on www.SeeMonterey.com?

Once Media files are uploaded in the Extranet they are automatically added to your business listing detail page on www.SeeMonterey.com. The files are displayed on the top right of the detail page and there is a feature to scroll through the library. If a YouTube video is linked under the Media section, a tab titled "YOUTUBE" will be displayed on the listing detail. When the tab is clicked a section loads for the videos to be viewed within the listing. Once a video finishes playing the start screen will be redisplayed and the visitor can select to play again. No additional videos will be loaded from YouTube within the player, only those uploaded by the member.



Amenities

The *Amenities* module is for members to enter information pertaining to the features of their facility, products and services offered, as well as general information on their business. Data input in the amenities section will be displayed on the member listing detail page on www.SeeMonterey.com. Visitors to the website can search and filter listing results based on any amenity in the system. These records are the responsibility of the member to maintain and update content as needed through the Member Extranet.

Where to Update Amenities

Member contacts with a security setting of *Update Member Records* have the ability to enter edit *Amenities* through the MCCVB Member Extranet. Once signed in, the page should default to the Member Record section. Scroll towards the bottom of the page under the Additional Fields section until you see a series of tabs on the left side. Select the tab titled Amenities to access the fields to update.



How to Update Amenities

When a user clicks on the *Amenities* tab a series of sub sections are displayed for the different amenity categories of Activities, Dining and Nightlife, Lodging, Golf, General, Conference/Group Services and Meeting Facilities. All members should update the General amenities section and then each additional sub section that pertains to their business.



Once you select the appropriate sub section, click the blue button titled *Edit Amenities*. Most fields are Yes or No answers and only those with a value of Yes will be displayed on your listing detail page as a bulleted list. Meeting Space information will be displayed in grid format and will have its own section on the detail page. After updating the appropriate fields, please make sure you hit Save instead of Close so the changes are made.

AMENITIES: UPDATE AMENITIES

Colored fields are required.

Facilities

Hours of Operation: <input style="background-color: #e0e0e0;" type="text" value="8:30am-5:30pm M-F"/>	Meeting Space On-site: <input type="radio"/> Yes <input checked="" type="radio"/> No
Miles from Monterey Airport: <input type="text"/>	Motorcoach Parking on site: <input type="radio"/> Yes <input checked="" type="radio"/> No
Miles to Convention Center: <input type="text"/>	Ocean View: <input type="radio"/> Yes <input checked="" type="radio"/> No
ADA-compliant: <input type="radio"/> Yes <input checked="" type="radio"/> No	Packages Available: <input type="radio"/> Yes <input checked="" type="radio"/> No

When will my Amenities appear on my listing on www.SeeMonterey.com?

Once Amenity fields are updated in the Extranet they are automatically added to your business listing detail page on www.SeeMonterey.com. You will see a tab next to Details for Amenities and a separate one for amenities related specifically to Meetings.

Monterey Conference Center

1 Portola Plaza, Monterey, CA 93940
 Phone (831)646-3770
 Fax (831)646-3777
[Visit Website](#) | [Send Email](#)

f Like 0
t Share

[back to listings](#)

DETAILS
AMENITIES
MEETINGS
EVENTS

Monterey Conference Center Meeting Facility

- # of Rooms: 12
- Total Sqft: 33,000
- Largest Room: 1,300
- Theatre Capacity: 2,400
- Classroom Capacity: 1,300
- Permanent Stage: ☑
- Outdoor Event Space Available: ☑

Meeting Facility Rooms

Room Name	Dimensions	Ceiling	Sq. Ft.	Theater	Classroom Size	Banquet Capacity	Reception
Colton Room (divisible into three sections)	57 X 29	9' - 19'	1653.00	150		110	150
Dana Room	20 X 25	9'	500.00		0		

Social Media

The *Social Media* section allows members to add links to their pages on Facebook, Twitter, YouTube, Pinterest, Flickr and Foursquare. Icons for each will be displayed on the member listing, as well as any YouTube videos loaded in the Web-Media section.

[Contacts](#) [Listings](#) [Web](#) [Amenities](#) [Benefits Summary](#) **Social Media**

[Update](#)

Social Media for Member/Partner

Facebook URL	<input type="text" value="http://www.facebook.com/SeeMonterey"/>
Flickr URL	<input type="text" value="http://www.flickr.com/groups/seemonterey"/>
Foursquare URL	<input type="text"/>
Pinterest URL	<input type="text"/>
Twitter Username:	<input type="text" value="SeeMonterey"/>
YouTube URL:	<input type="text" value="http://www.youtube.com/SeeMonterey"/>

Monterey County Convention & Visitors Bureau

[Like](#) 0 [Share](#)

[back to listings](#)

765 Wave Street , Monterey, CA 93940
 Phone (831) 657-6400
 Fax (831) 648-5373
[Visit Website](#)

If you have multiple listings and different social media links for each you can enter them on the listing level. Instead of clicking the Pencil icon to edit and existing listing, click on the *Type* or *Listing ID* number.

[Contacts](#) [Listings](#) [Web](#) [Amenities](#) [Benefits Summary](#) [Social Media](#)

[Add New Listing](#)

Filters: All Listings

Action	Listing ID	Type	Category	SubCategory	Rank	Listing
	2337	Official Monterey County Travel Guide	Visitor Services	Nonprofit Associations	Standard	official travel guide
	2338	SeeMonterey.com	Visitor Services	Nonprofit Associations	Standard	see monterey non profit
	2650	SeeMonterey.com	Conference and Wedding Services	Event/Meeting Planners	Standard	see monterey event planner
	2692	SeeMonterey.com	Visitor Services	Concierge Services	Standard	Stop off at the Monterey County Visitors Center. It's full of pamphlets for individual attractions, hotels, and restaurants. The helpful visitors center staff can provide guidance and give directions

At the bottom of the listing page there will be a section titled Social Media that is a copy of what you see in the Social Media section on the account level. Enter the proper links and click *Update* to save.

Listing Information	
Listing ID: 2692	Account: Monterey County Convention & Visitors Bureau
Type: SeeMonterey.com	Contact: --None--
Category: Visitor Services	Address Type: Account: Physical
SubCategory: Concierge Services	Rank: Standard
Additional Subcategories: --None--	
Listing: Stop off at the Monterey County Visitors Center. It's full of pamphlets for individual attractions, hotels, and restaurants. The helpful visitors center staff can provide guidance and give directions to locations throughout Monterey County. Summer: Open daily 9am–6pm, Sundays from 9am–5pm Winter: Open daily 9am–5pm, Sundays from 10am–4pm Closed on Thanksgiving, December 25, January 1, Easter	
Listing Details	
Company: Monterey County Convention & Visitors Bureau	Company (sort): Monterey County Convention & Visitors Bureau
Address: 401 Camino El Estero Monterey, CA 93940 UNITED STATES	Email:
Primary: (831) 657-6400	Web Site: http://www.seemonterey.com
Tollfree: (800) 555-6290	WCT ID:
Notification Email:	Alternate:
	Fax: (831) 648-5373
	Notification Interval: 0
Social Media	
<input type="button" value="Update"/>	
Social Media for Member/Partner	
Twitter Username:	<input type="text"/>
YouTube URL:	<input type="text"/>
Flickr URL:	<input type="text"/>
FaceBook URL:	<input type="text"/>
foursquare URL:	<input type="text"/>

Benefits Summary

The Benefits Summary acts as a scorecard to view what the MCCVB has done for your business over a set period of time. We also use it to track opportunities you have participated in and events that were attended. There are nine different sections within the Benefits Summary for members to access at any time.

Contacts	Listings	Web	Amenities	Benefits Summary	Social Media			
Inkind/Expenses	Inkind/Expenses Received	Leads	Services	Events	Articles	Web Site	Coupon Hits	Advertising Opportunities

Inkind/Expenses

The In-kind/Expenses tab will track and display all in-kinds or expenses *provided by* the account in view. For example, if a lodging property provided a room for a meeting planner, you would see this shown as an in-kind on the In-kind/Expenses tab. The In-kind/Expenses grid displays a summary of information about each record including the type (In-kind or Expense), group, recipient, date occurred, the amount, type and description, as well as when the record was created and who created the record. In-kinds and expenses that are provided as member-to-member contributions can also be recorded on the Inkind/Expenses tab.

Inkind/Expenses	Inkind/Expenses Received	Leads	Services	Events	Articles	Web Site	Coupon Hits	Advertising Opportunities	
5	Expense	Member/Partner	Monterey County Convention & Visitors Bureau	Meal	2012-02-18 00:00:00.0	\$500.00	Took client to dinner at MCCVB.	02/16/2012	Allyson Thommen
6	Inkind	Meeting Sales	Monterey County CVB	Admission	2012-02-27 00:00:00.0	\$25.00	Donated 2 admission tickets to the CVB.	02/27/2012	Allyson Thommen

Inkind/Expenses Received

The In-kind/Expenses Received tab tracks and displays all in-kinds and expenses that were received by one member from another member. For example, if our CEO took a member to lunch, we would enter this as an expense received on the member account.

Type	Account	Date	Amount	Service	Service Description	Created By	Created	Last Updated By	Last Updated
Expense	Monterey County Convention & Visitors Bureau	02/18/2012	\$500.00	Meal	Took client to dinner at MCCVB.	Allyson Thommen	02/16/2012		

Leads

The Leads section displays a count of all leads sent in each user group for a specific date range (Executive Plus and higher members only). To see all leads sent within a different date range, simply change the date range and click **Refresh**. While viewing lead totals, you can click on any link in the first column to view detailed lead information. For example, clicking Total Number of Leads Sent in the Meeting Sales section will display a printable view of detailed lead information for all Meeting Sales leads sent to your property. If you would like to see only the number of leads sent that were lost to another property, you would click the "Number of Leads Lost to Another Property" link.

Date Range:		Refresh
02/01/2012 to 06/30/2013		
Click on any section in first column to see a detailed report		
Meeting Sales		
Total Number of Leads Sent	4	-
Number of Leads Pending	1	25.00%
Number of Assists	0	0.00%
Number of Leads Won	0	0.00%
Number of Leads Lost to Another City	2	50.00%
Number of Leads Lost to Another Property	1	25.00%
Number of Leads Won, but Cancelled	0	0.00%
Tour/Travel		
Total Number of Leads Sent	0	-
Number of Leads Pending	0	-
Number of Assists	0	-
Number of Leads Won	0	-
Number of Leads Lost to Another City	0	-
Number of Leads Lost to Another Property	0	-
Number of Leads Won, but Cancelled	0	-
Media/PR		
Total Number of Leads Sent	2	-
Number of Leads Pending	2	100.00%

[Print this Page](#) [Close Window](#)

Leads Sent for Monterey County Convention & Visitors Bureau
 Group: Meeting Sales | From: 02/01/2012 - 06/30/2013

Lead ID	Meeting Name	Organization	Account	Hotel Response Due	Hotel Responded Date	Arr/Dept Dates	Requested RN's	Status
C1991	2012 JBEI Summer Retreat		Lawrence Berkeley National Laboratory	02/17/2012		May 14-16, 2012	384	Definite
C2041	Simpleview Test		Monterey County CVB	03/23/2013		Apr 2-3, 2013	0	Lost Business
C1999	Test Lead		Monterey County CVB	04/07/2012	02/28/2012	Apr 9-10, 2012	15	Lost Business
C2243	testing		Monterey County CVB	08/04/2012		Aug 29-31, 2012	20	Lead

Total Number of Leads = 4 Total Requested Room Nights = 419

Services

The Services section displays a count of all service requests and partner referrals sent in each user group for a specific date range. To see all service requests sent within a different date range, simply change the date range and click **Refresh**. You can also view detailed information of the service requests sent by clicking one of the three available links for each user group, which are: Number of Service Requests Sent, Number of Service Requests Won, and Number of Partner Referrals.

Contacts	Listings	Web	Amenities	Benefits Summary	Services	Events	Articles	Web Site	Coupon Hits	Advertising Opportunities	
Date Range: 07/01/2012 to: 06/30/2013 Refresh											
Click on any section in first column to see a detailed report											
Meeting Sales											
Number of Service Requests Sent										0	-
Number of Service Requests Won										0	-
Number of Partner Referrals										0	-
Tour/Travel											
Number of Service Requests Sent										0	-
Number of Service Requests Won										0	-
Number of Partner Referrals										0	-
Consumer											
Number of Partner Referrals										0	-
Media/PR											
Number of Service Requests Sent										0	-
Number of Service Requests Won										0	-
Number of Partner Referrals										0	-
Member/Partner											
Number of Partner Referrals										0	-

Events

Each time a contact associated to your business is added as an attendee for an MCCVB event, the event attendance and non-attendance is recorded in the Events section of the Benefits Summary tab. A summary of event information is presented, including event name, location, start and end date, type, number of attendees invited, and the number of invited attendees who accepted the invitation. The events displayed are filtered by date range. You can change the date range by simply entering the new dates in the date fields near the top and the grid will automatically refresh.

Contacts	Listings	Web	Amenities	Benefits Summary	Social Media	Events	Articles	Web Site	Coupon Hits	Advertising Opportunities
----------	----------	-----	-----------	------------------	--------------	---------------	----------	----------	-------------	---------------------------

Filters:	02/01/2012	to	06/30/2013	Page 1 of 1
----------	------------	----	------------	-------------

Event Name	Location	Event Start Date	Event End Date	Event Type	# of Attendees	# Attended
MCCVB Annual Luncheon		06/20/2012	06/20/2012	Member Event	1	0

Articles

The Articles section displays articles generated by our Media/PR team that mention your business. The grid displays summary information including the article date, headline, and journalist, as well as the medium, circulation, value and publication. If available, a link to the article will also be included. A date range filter is available within the grid. You can change the date range by simply entering the new dates in the date fields near the top and the grid will automatically refresh.

Contacts	Listings	Web	Amenities	Benefits Summary	Social Media	Articles	Web Site	Coupon Hits	Advertising Opportunities
----------	----------	-----	-----------	------------------	--------------	-----------------	----------	-------------	---------------------------

Filters:	02/01/2012	to	06/30/2013	Page 1 of 1
----------	------------	----	------------	-------------

Article Date	Headline	Journalist	Medium	Circulation	Value	Publication
02/28/2012	3-12 MCCVB Visitor eNews			20000		
05/10/2012	Tasting Our Way Through Monterey	Frost, Marcia	Web			GirlsGetaway.com

Website

Listing views and click-thrus for **SeeMonterey.com** are tracked and then stored in the Web Site section. Listing views are tracked by month; select a new month and year and then click **Refresh** to see the listing views updated. Grouped by listing, the summary information displayed includes the following counts for your business listing.

Listing Views: Displays the count of listing views for the month selected

Listing Click-thrus: Displays the total number of click-thrus to member website from the listing for month selected

Twitter Click-thrus: Displays the total number of click-thrus to member Twitter account from the listing for month selected

Facebook Click-thrus: Displays the total number of click-thrus to member Facebook page from the listing for month selected

YouTube Click-thrus: Displays the total number of click-thrus to member YouTube page from the listing for month selected

Flickr Click-thrus: Displays the total number of click-thrus to member Flickr account from the listing for month selected

Foursquare Click-thrus: Displays the total number of click-thrus to member foursquare page from the listing for month selected

This listing has been viewed X times since X date: Displays the total number of listing views from the date the listing was created.

[Contacts](#) [Listings](#) [Web](#) [Amenities](#) [Benefits Summary](#) [Social Media](#)
[Inkind/Expenses](#) [Inkind/Expenses Received](#) [Leads](#) [Services](#) [Events](#) [Articles](#) [Web Site](#) [Coupon Hits](#) [Advertising Opportunities](#)
 Month: Year: [Refresh](#)

Monterey County Convention & Visitors Bureau - SeeMonterey.com/Visitor Services/Nonprofit Associations

Listing Views:	3
Listing Click-thrus:	0
Twitter Click-thrus:	0
Facebook Click-thrus:	0
YouTube Click-thrus:	0
Flickr Click-thrus:	0
FourSquare Click-thrus:	0

This listing has been viewed 78 times since February 1, 2012

Coupon Hits

If you loaded a Coupon for your business you can view the number of times a consumer has viewed it for a specific date range. Simply select a month and year for each date range option and click **Refresh** to see the coupon hits.

[Inkind/Expenses](#) [Inkind/Expenses Received](#) [Leads](#) [Services](#) [Events](#) [Articles](#) [Web Site](#) [Coupon Hits](#) [Advertising Opportunities](#)
 Month: Year: [Refresh](#)

Coupon Title	Hits
Sunsational Getaway	17

Advertising Opportunities

This section allows the MCCVB to track advertisements that your business has participated in and will help you track ad spending. Each advertisement that your business purchases, or is given in trade, will appear in the Advertising Opportunities sub-tab within the Benefits Summary tab. The grid includes the promotion or ad name, the amount, cash amount or trade amount and the ad category.

[Contacts](#) [Listings](#) [Web](#) [Amenities](#) [Benefits Summary](#) [Social Media](#)
[Inkind/Expenses](#) [Inkind/Expenses Received](#) [Leads](#) [Services](#) [Events](#) [Articles](#) [Web Site](#) [Coupon Hits](#) [Advertising Opportunities](#)
 Filters: 02/01/2012 to 06/30/2013 Page 1 of 1

Promotion	Amount	Ad Category	Cash Amount	Trade Amount
AAA Via Email	0.01		0.01	0.00

Extranet Parent and Child Accounts

If you have multiple businesses that are members of the MCCVB, you can setup an Extranet Parent account to access all records for each business under one login. When you login under the parent account there is a drop down on the top right of the page which displays who is logged in and to what account. Select which Child Account you wish to access and the page will load with the details for that business. All other Extranet sections are accessed the same as on the Parent Account. To request this feature, please contact Kimberly@seemonterey.com.

Monterey County CVB Welcome, Kimberly Jenkins - Logged in to: **Monterey County Convention & Visitors Bureau**

Leads Member Record Occupancy Service Requests Reports Partner Bulletins

ACCOUNT DETAIL: MONTEREY COUNTY CONVENTION & VISITORS BUREAU

Account Information		
Account ID: 436		Status: Active
Account: Monterey County Convention & Visitors Bureau		Region: Monterey
Account (sort): Monterey County Convention & Visitors Bureau		Email:
Parent:		Web Site: http://www.seemonterey.com
Formerly:		

Partner Bulletins

The Partner Bulletins section of the Member Extranet is a dashboard where we will post important messages for members to access. These messages may pertain to many facets of your MCCVB Membership benefits and have been broken out into multiple categories. Please review this section from time to time to keep up to date on the MCCVB. When the Partner Bulletins pages loads it will default to the most recent messages. Any that are highlighted in blue are coded as the most important for members to review. Members can select the specific category of bulletins they wish to view, as well as search for previously posted bulletins using the options on the left side of the page.

Leads Member Record Occupancy Service Requests Reports **Partner Bulletins**

Partner Bulletins

Search Messages

All Categories

Enter Search Keyword

Message Categories

[Extranet Training Manuals \(2\)](#)

[Group Sales Bulletins \(2\)](#)

[Membership Bulletins \(2\)](#)

Recent Messages

Coupons and Special Offers Training Manual (Read: 07/27/2012) 07/27/2012

This new feature will allow visitors to access deals and special offers posted by members and download coupons to be redeemed at your business. These coupons will be featured on your business listing detail page, as well as the specials page www.SeeMonterey.com/special-offers. If your business is currently offering any specials or promotions please review the instruction manual to begin submitting. [more >>](#)

[MCCVB Extranet Manual - Coupons.pdf](#)

Changes to Sales Lead Catcher and Sales Lead Contact assignment (Read: 07/26/2012) 07/11/2012

A new security level called Sales Lead Catcher was activated on Friday, July 13. This level denotes the member contacts that should receive email notifications of new sales leads and assign them to individual Sales Managers. Contacts that previously received the lead notifications were automatically setup with this access. [more >>](#)

[MCCVB Extranet Manual - Group Sales Leads.pdf](#)

Group Sales 2012-13 Tradeshow Calendar & Signup Form (Not Read) 02/21/2012

Sign up to participate with the Monterey County CVB at upcoming Industry Tradeshows and Client Events. Download the Calendar and Agreement from and submit to via fax to Stephanie Calica, Sales Coordinator, at 831-648-5373 or email at Stephanie@mccvb.org. [more >>](#)

[2012-2013 MCCVB TS CE Co-op Forms.zip](#)

Extranet Training Manuals

The first category of bulletins is for Extranet Training Manuals. This section is where the MCCVB will post the full Extranet Training Manual, as well as PDFs of manuals for each individual section. These files should act as a reference guide to the system for members. When new enhancements are released, bulletins notifying members of the updates will also be posted here.

Group Sales Bulletins

The second section is for bulletins related to the Group Sales Department. Examples include any system enhancements that affect functionality to the Leads and Service Requests section of the Member Extranet, the calendar and agreement form to sign up for tradeshows and client events, or other sales related documents.

Marketing and Communications Bulletins

This section is where members can find out about marketing co-op programs and communications initiatives.

Membership Bulletins

The final section is for general Membership bulletins and will contain information about the different membership levels of the MCCVB and the benefits for each. This section will also include notifications on enhancements to the system that affect member business listings on the website.

Leads

The Leads section contains requests from Groups and from Media that are interested in your business. Group leads consist of Meeting Sales requests and Tour & Travel requests, whereas Media contains requests from journalists for a press trip. As our Group Sales department receives inquiries from clients, we send out the information via the Extranet for members to access and respond to. The members that receive leads are at the request of the client; however, our sales team assists in expanding the type and number of members the clients look at. When your property is selected to receive a lead, your designated Lead Catcher will receive an email notification prompting them to login to the Extranet to view the lead.

Where to access Leads in the Extranet?

Member contacts with a security setting of Sales Lead Catcher, Sales Lead Contact or Media Lead Contact have the ability to access leads through the MCCVB Member Extranet. Once signed in, the page may default to the Member Record section or the Leads Section depending on what other security levels the contact has access to. At the top of the page, select the tab on the far left titled Leads.



ACCOUNT DETAIL: MONTEREY COUNTY CONVENTION & VISITORS BUREAU

Account Information	
Account ID: 436	Status: Active
Account: Monterey County Convention & Visitors Bureau	Region: Monterey
Account (sort): Monterey County Convention & Visitors Bureau	Email:
Parent:	Web Site: http://www.seemonterey.com

When you select the Lead tab a second row of options is displayed to access either Group Leads or Media Leads depending on your security settings.



Assigning and Responding to Group Leads

When Group Leads is selected from the Leads menu, the page will load to the Leads View list and default to any new leads. These are leads where the Hotel Response Date is in the future. Users can click any of the headers to sort the list or use the search by keyword field. The contacts designated with the security setting of Sales Lead Catcher will be able to see all leads sent to your business and assign them to designated sales managers.



To review and assign the lead either click on the Opportunity ID or the Opportunity name. Once the lead detail loads, scroll to the bottom part of the page until you see the section titled Contact (under History/Futures). Click the Change Contact button to assign the Sales Manager. Select the appropriate person from the drop down list of your Sales Lead Contacts and click save. Any status update emails sent from the MCCVB will now go to the Sales Lead Catcher and the Sales Lead Contact assigned to the lead.



ASSIGN CONTACT

Contacts

 --Select A Contact--
 --Select A Contact--
 Kimberly Jenkins
 Allyson Thommen
 john van kirk

Once a lead is assigned in the Extranet, please inform the Sales Manager to login and access. When they go to the Lead View list, they will only see leads assigned to them, not those assigned to other sales managers or that have yet to be assigned. As previously mentioned, the Lead View list will default to New leads with a Hotel Response Date in the future. After this date passes a new response cannot be submitted through the Extranet. If you miss the deadline and need to submit a response, please email it to the MCCVB Sales Executive handling the lead.

Lead Type	Opportunity ID	Opportunity	Organization	Hotel Response Date	Arr/Dept Dates	Status	Responded	Create Date	Assigned Contact
Meeting Sales	2243	testing	Monterey County CVB	07/31/2012	Aug 29-31, 2012	New	No	07/09/2012	Kimberly Jenkins

To submit a response, click on the Opportunity ID or Opportunity Name to open the Lead Detail page. Once you have reviewed all information, scroll to the Responses section at the bottom of the page. There should be an option to enter a response for the Preferred Date and any Alternate Dates the client is inquiring about. If you cannot offer any of the dates, you can respond on just the Preferred Dates and state that none are available.

Responses						
Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	08/29/2012 - 08/31/2012 (Primary)	08/29/2012 - 08/30/2012	No Response Entered			No
Add Your Response	09/05/2012 - 09/06/2012	09/05/2012 - 09/05/2012	No Response Entered			No
Add Your Response	09/12/2012 - 09/13/2012	09/12/2012 - 09/12/2012	No Response Entered			No

When the Response page loads, please complete all required fields denoted by red font in the Field Name. If you are unable to bid, please select No in the Pursuing this Lead field and enter the reason why in the Comments field. If you will be bidding on a lead, please select Yes on the Pursuing this Lead field. Any information in the required Comments box may potentially be shared with the client if the MCCVB is collecting responses. If there is information you would like the MCCVB to have (but not the client), please enter in the Bureau Only Comments field. Partners can also include the base rate or rate range they can offer the client on the Response form.

Response Information

Pursuing this lead? Yes No

Comments:
Please enter comments pertaining to your bid response or turn down reason. If the lead is Confidential the MCCVB will share these comments with the client.

Bureau-Only Comments:
These comments will not be seen by the client; they will only be seen by the staff of Monterey County Convention & Visitors Bureau.

Rate Range 0 to 0
Please enter the rate range your property can offer. If you do not have a range please enter a rate in the first box.

The Room Information section is where partners can enter the total amount of rooms they can offer per night. Inventory can also be split based on the room type, if the client needs a mixture of rooms. The File Attachments section is where you can upload your full proposal if the MCCVB is collecting responses for the client.

Room Information

Please enter the number of rooms per night your property can accommodate. If the client requested a specific amount of a certain room type please enter accordingly (Single vs. Double).

	Wednesday 08/29/2012	Thursday 09/30/2012	Friday 08/31/2012	Saturday 09/01/2012	Sunday 09/02/2012	Monday 09/03/2012	Tuesday 09/04/2012
Any	0	0					
Single	0	0					
Double	0	0					
Multiple	0	0					
Kings	0	0					
Suites	0	0					
Total	0	0	0	0	0	0	0
Requested	10	10	0	0	0	0	0

File Attachments: --None--
Add View Remove

How to View Pending Leads

Once the Hotel Response Date has passed a lead will automatically move to the Pending section regardless if a response has been submitted. Members can still view lead details when in Pending status but they are not able to respond to the lead through the Extranet. To view leads in this status, set the *Filter* to *Pending*, as with new leads a sales manager will only see leads assigned to them. If you notice a lead in Pending status does not have a response but you are bidding, please email the MCCVB sales executive for it to be added.

Leads Member Record Occupancy Service Requests Reports Partner Bulletins

GROUP LEADS MEDIA LEADS

ALL LEADS - CURRENTLY 0 IN VIEW

Filter: Closed/TBD --All Groups-- --All Responses-- Search By Keyword

--Any Status--
New
Pending
Closed/Won

Starts With: A B C D E F G H I J K L M N O P Q R S T U V

Lead	by ID	Opportunity	Organization	Hotel Re
T	Closed/Lo			
	Closed/TBD			
	Closed/Won			

How to Confirm a Booking

When a group selects your property the booking needs to be confirmed to track productivity. If the MCCVB is notified by the client of a selection we will email the lead

catcher and assigned contact to submit details on the booking including dates, room flow, average rate and potentially additional meeting space information. Once the Booking Confirmation email is received, members are required to reply with requested information or include a copy of the countersigned contract.

Members can also inform the MCCVB when their property is selected by viewing the lead within the *Pending* section and selecting the option to *Edit Your Response*. Once the response screen loads, scroll to the Additional Fields section and mark the *Booking Confirmed* field as *Yes*. This will prompt the MCCVB to send the email to submit booking details. Members can also opt to email the MCCVB sales executive with booking details.

Room Information

Please enter the number of rooms per night your property can accommodate. If the client requested a specific amount of a certain room type please enter accordingly (kings vs. doubles).

	Wednesday 08/29/2012	Thursday 08/30/2012	Friday 08/31/2012	Saturday 09/01/2012	Sunday 09/02/2012	Monday 09/03/2012	Tuesday 09/04/2012
Any	0	0					
Singles	0	0					
Doubles	0	0					
Multiple	0	0					
Kings	0	0					
Suites	0	0					
Total	0	0	0	0	0	0	0
Requested	10	10	0	0	0	0	0

File Attachments

File Attachments: --None--

[Add](#) [View](#) [Remove](#)

Additional Information

General

Booking Confirmed? Yes No

How to View Closed Leads

Once a group contracts with an area hotel and the lead details have been confirmed the lead is closed out. Our team will send out a notification email to the assigned contact stating where the lead booked. If your property was selected choose the option for Closed/Won on the filter in the lead view list. This will bring up all leads booked at your property through the MCCVB. If your property was not selected, choose the Closed/Lost option.

Leads Member Record Occupancy Service Requests Reports Partner Bulletins

GROUP LEADS MEDIA LEADS

ALL LEADS - CURRENTLY 0 IN VIEW

Filter: Closed/TBD --All Groups-- --All Responses-- Search By Keyword

Starts With: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V

Lead	Opportunity	Organization	Hotel Re
	Closed/Won		
	Closed/Lost		
	Closed/TBD		

When the Lost list loads, click on the name of the opportunity to view details of where the group booked. If the group booked in Monterey County the Selected Partners field will display the name of the property. If the group did not book here the Lost Business Code and Lost Comments fields will display why Monterey County was not chosen and what destination was if known.

OPPORTUNITY DETAIL (CLOSED/LOST): SIMPVIEW TEST

Opportunity Information	
Opportunity ID: 2041	
Meeting Name: Simpleview Test	Profile:
Account: Monterey County CVB	3rd Party Meeting Planner:
Contact: Kimberly Jenkins 765 Wave Street Monterey, CA 93940 UNITED STATES (831) 657-6421 kimberly@mccvb.org	3rd Party Meeting Planner Contact:
Type: --None--	Source Code: --None--
EEl Type: Default	Market Segment: --None--
Decision Making Process:	Meeting Pattern:
Status: Closed/Lost	Attendees: 100
Decision Date: 03/27/2013	Site Inspection? No
Hotel Response Due: 03/23/2013	Confidential: No
Repeat Business: No	
Sales Manager: Test User crm@simpleviewinc.com 123.123.1234	
Meeting Requirements: test	
Schedule of Events:	
Action Requested:	
Comments:	
Competitive Sites:	
Meeting Open:	
Lost Business Code: Canceled meeting	
Lost Comments: test only	
Sent To Partners: Monterey County Convention & Visitors Bureau, Simp ... (Show More)	
Selected Partners: test	

Assigning and Responding to Media Leads

When Media Leads is selected from the Leads menu, the page will load to the Leads View list and default to any new leads. These are leads where the Response Due Date is in the future. Users can click any of the headers to sort the list or use the search by keyword field. Unlike like Group Leads, there is no Sales Manager assignment process in Media Leads. To view a lead, click on the Opportunity ID or Opportunity Name to open the Lead Detail page.

GROUP LEADS		MEDIA LEADS	
ALL MEDIA LEADS - CURRENTLY 1 IN VIEW			
Filter: New	--All Responses--	Search By Keyword	Page 1 of 1
Starts With: A B C D E F G H I J K L M N O P		Other: All	
Opportunity ID	Opportunity	Contact	Response Due Date
6	Media Opportunity: Community Publications	Heather Evans	09/07/2012
			09-11, 2012
			Lead No 08/30/2012

Once you have reviewed all information, scroll to the Responses section at the bottom of the page. There is link called Add your Response to create new and Edit your Response if one was already submitted. After the Response Due Date passes the lead can be accessed by changing the filter on the Lead List View to Pending or Any Status but a new response cannot be submitted through the Extranet. If you miss the deadline and need to submit a response, please email it to the MCCVB contact handling the lead.

OPPORTUNITY DETAIL: MEDIA OPPORTUNITY: COMMUNITY PUBLICATIONS

Opportunity Information	
Opportunity ID: 6	Contact: Heather Evans 5901 Warner Avenue, Suite 321 Huntington Beach, CA 92649 UNITED STATES
Lead Name: Media Opportunity: Community Publications	
Status: Lead	
Arrival: 10/09/2012	Publication: --None--
Departure: 10/11/2012	Type: Individual FAM
Response Date: 09/07/2012	Medium: Magazine
Notes: Community Publications produces four glossy, color format magazines in Southern California. The piece on Monterey Peninsula travel will be printed in South County, Newport Mesa, Huntington Beach, and Orange Magazines. The feature will run in late Fall or early Winter. All participating lodging, dining, and recreation will be showcased with accompanying color photography.	
Media Specs: --None--	

Additional Fields	
General	
Focus:	Round-up travel feature focused on the Monterey Peninsula
Specific Requests:	- Complimentary room for one split between jurisdictions - Hosted meals and activities

Responses						
Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	10/09/2012 - 10/11/2012	10/09/2012 - 10/11/2012	No Response Entered			No

When the Response page loads, please select whether or not you are pursuing the request and include any comments you would like the journalist to see. If you have comments for just the MCCVB contact, enter those in the Bureau-Only Comments field. You can also upload an attachment if requested.

Response Information	
Pursuing this lead?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Comments:	<div style="border: 1px solid #ccc; height: 40px;"></div>
Bureau-Only Comments: <small>These comments will not be seen by the client; they will only be seen by the staff of Monterey County Convention & Visitors Bureau.</small>	<div style="border: 1px solid #ccc; height: 40px;"></div>
File Attachments	
File Attachments:	--None--
	<input type="button" value="Add"/> <input type="button" value="View"/> <input type="button" value="Remove"/>
<input type="button" value="Save"/> <input type="button" value="Return to Lead"/>	

Viewing Closed Leads

Once a press trip has been finalized, the MCCVB will inform members of their selection after the Response Due Date. We will also associate the request to the businesses that were selected in the system. At this time, the lead will either move to the Closed/Won or Closed/Lost section depending on if your business was selected. To view, simply change the filter to the desired selection and all leads of that type will be displayed.

Leads Member Record Occupancy Service Requests Reports Partner Bulletins

GROUP LEADS MEDIA LEADS

ALL MEDIA LEADS - CURRENTLY 0 IN VIEW

Filter: Closed/Won --Any Status-- Responses-- Search By Keyword

Starts With: A B C D E F G H I J K L M N O P Q R S T U V W

Oppor tunity Contact

Service Requests

The Service Requests section is similar to the Leads section and will display leads sent to your business that do not contain sleeping rooms. The majority of these requests will be for offsite meeting space, group dining venues, and transportation or team building options. When the section loads, users will see the Service Request list view that is set up comparable to the Leads list view screen. Unlike the Leads screen, it will default to requests of any status instead of just new requests.

Leads Member Record Occupancy **Service Requests** Reports Partner Bulletins

ALL SERVICE REQUESTS - CURRENTLY 2 IN VIEW

Filter: --Any Status-- All Groups--

Starts With: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other: All

Request Type	Request ID	Service Request	Contact	Lead	Type	Deadline	Status	Responded
Meeting Sales	292	Test Lead Offsite	Allyson Thommen	Test Lead	Offsite Venue & Transportation	03/31/2012	Pending	Yes
Meeting Sales	72	Tour and Travel / FIT Education Day Table-top Registration - Service Lead	Jerry Diaz		New Business	02/27/2009	Closed/Lost	No

Number of Results: 25

When you click on the name of the request the detail view page loads. This page contains the specifics of the request, the client contact, and a section for you to add a new response or edit an existing response.

SERVICE REQUEST DETAIL: TEST LEAD OFFSITE

Request Information

Request ID: 292	Request Type: Offsite Venue & Transportation
Account: Monterey County CVB	Request Status: Pending
Lead: Test Lead	Attendees: 15
Request Name: Test Lead Offsite	Budget: \$50
Dates: 04/09/2012 - 04/09/2012	Location:
Times: 01:00 PM - 02:00 PM	
Deadline: 08/31/2012	
Description/Notes: Looking for an offsite dinner venue for 15 people ... (Show More)	
Additional Documentation: None	
Sales Manager: Kimberly Jenkins	
Services Manager:	

Contact Information

Contact: Allyson Thommen	Address: 765 Wave Street
Title: Marketing Coordinator	City: Monterey
Company: Monterey County CVB	State: CA
Phone: (831) 657-6404	Zip: 93940
Fax: (831) 648-5373	Country: UNITED STATES
Email: allyson@mccvb.org	

Additional Fields

General

Lead Source: Repeat	Market Segment:
Preferred Method of Communication: Email	Decision Process:
Contract Location: Monterey, CA	Alternate Dates: 03/05/2012 - 03/06/2012 or 03/12/2012 - 03/13/2012
Rate Comments:	Meeting Room Requirements:

Admin

Supplemental Lead Opt Out: No

Responses

Start Date - End Date	Responded	Last Updated	Comments
04/09/2012 - 04/09/2012	Yes	02/22/2012	yes will bid

Edit Your Response | View Your Response

When you click to Add/Edit a response, a box opens up to select whether or not you are pursuing the request. Enter any necessary comments and upload a proposal or other files if

requested. Once the deadline passes, the request can still be accessed but you will not be able to enter a new response through the system, when this happens please email the MCCVB contact your bid details.

The screenshot shows a web interface with two main sections. The top section, titled "Response Information", contains a form with a "Pursuing this lead?" field with radio buttons for "Yes" and "No". Below this is a "Comments:" field with the text "yes will bid". There is also a "Bureau-Only Comments:" field. The bottom section, titled "File Attachments", has a "File Attachments:" dropdown menu currently set to "--None--". Below the dropdown are three buttons: "Add", "View", and "Remove".

Reports

The Reports section of the Member Extranet is still being developed. This section currently contains the Convention Calendar, which lists upcoming groups staying in Monterey County that booked through the MCCVB and the Article By Partner report listing articles generated for member hosted media visits. Additional reports are being established and may include a Pace Report, Compression Report or Productivity Report. Only users set with security access to View Reports will have access to this section.

The screenshot shows the "Monterey County CVB Extranet" navigation menu. The menu items are "Leads", "Member Record", "Occupancy", "Service Requests", "Reports", and "Partner Bulletins". The "Reports" item is highlighted with a red box. Below the navigation menu, the "REPORTS" section is visible, containing "Bureau Reports" and "Leads". Under "Leads", there is a link for "CONVENTION CALENDAR" with the description "Definite Opportunities, refined by arrival date, for member use." Under "Accounts", there is a link for "ARTICLES BY PARTNER" with the description "Article list broken down by Partner, refineable by Partner".