



# CRM TRAINING PACKAGE

## EMPOWERING MEMBERS/PARTNERS WITH THE SIMPLEVIEW EXTRANET

Comprehensive and hands-on, this is the core training that ensures your members and partners' success with the Simpleview Extranet. It's a must for those hotels, restaurants, attractions and other stakeholders who want to manage their data in your Simpleview CRM Member/Partner user group.

### TOPICS

#### For hotels, restaurants, attractions, and other stakeholders:

- Creating and maintaining details about your business/organization, such as Listings, Leisure Events, Coupons, and Amenities
- Accessing reports of successes in the Benefits Summary

#### For DMO staff:

- Using administrative features of the Extranet, such as creating Partner Bulletins, customizing layouts and using the Image Carousel

### DURATION

Trainings will be a total of 3 days

### LOCATION

On-site at client's office or Simpleview's Tucson or Pittsburgh offices

### BEFORE THE TRAINING

We highly recommend that students participate in our CRM Overview online course in the Brainery and take the associated exam before the on-site training session, as it will provide a solid understanding of basic Simpleview CRM concepts and functionality. Going through this material will provide the smoothest training experience possible.

# MODULES & TOPICS

Any sections of the training that are not listed as 'Optional' and/or 'Optional by Trainer's Discretion' cannot be removed from a training engagement.

LOGGING INTO THE EXTRANET;  
NAVIGATING THE EXTRANET

USING THE POST BOARD

MAINTAINING ACCOUNT DETAILS

CREATING, EDITING AND  
DELETING LISTINGS

CREATING, EDITING AND  
DELETING COUPONS

MAINTAINING YOUR  
ACCOUNT'S AMENITIES

REVIEWING AND USING  
THE BENEFITS SUMMARY

CLIENT | CONNECTING  
MEMBER/PARTNER DATA TO  
YOUR MEMBERS AND PARTNERS  
VIA THE EXTRANET

- Creating and Reviewing Partner Bulletins
- Using the Layout Manager
- Setting up Extranet Emails
- Using the Extranet Image Carousel

## Questions?

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