This is an interactive course for those who handle Membership/Partnership Relations on your DMO team. Gain hands-on experience overseeing the management of your destination’s members and partners in the Simpleview CRM.

**TOPICS**
- Developing robust Listings
- Promoting upcoming Events
- Tracking In kind/Expenses
- Other essential details of the membership/partnership relations job role
- Our instructors will also train your organization’s members and partners on using the Extranet to create and modify their Member/Partner data

**DURATION**
5 Days Total; 3 days client training + 2 days member/partner training on extranet

**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 the material will provide the smoothest training experience possible.
ACCOUNT DEVELOPMENT

- Navigating Accounts
- Using Account Filters
- Modifying the Grid Settings
- Adding a New Account
- Merging Accounts
- Creating and Using Account Tags
- Geo-Coding Accounts
- Using Account Recaps
- Creating/Editing/Deleting Account Statuses
- Importing Accounts*

CONTACT DEVELOPMENT FOR ACCOUNTS

- Navigating Contacts
- Using Contact Filters
- Modifying the Grid Settings
- Adding a New Contact
- Merging Contacts
- Creating and Using Contact Tags
- Viewing a Contact’s Permission Report
- Handling Orders
- Giving Access to Extranet
- Creating/Editing/Deleting Contact Types
- Contact Security Roles

CREATING COUPONS FOR ACCOUNTS

- Adding a New Coupon
- Creating/Editing/Deleting Coupon Categories
- Approving/Denying Pending Coupons

CREATING LISTINGS FOR ACCOUNTS

- Navigating Listings
- Using Listing Filters
- Modifying the Grid Settings
- Adding a New Listing
- Creating and Using Listing Tags
- Creating/Editing/Deleting Listing Categories, Subcategories, Ranks and Types
- Use Overwrite Fields
- Creating and Using Partner Referral Contacts

ADDING LISTINGS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Using the Simpleview CMS Page Builder
- Adding Listings Widgets to a Page

USING TRACES FOR ACCOUNTS*

- Navigating Traces on the Account Detail
- Adding a New Trace
- Editing, Cloning and Deleting Existing Traces
- Labeling Traces as Completed
- Printing Trace History for an Account
- Creating/Editing Deleting Trace Priorities and Types
- Using MyCalendar to Visualize Trace Data

CREATING COUPONS FOR ACCOUNTS

- Adding a New Coupon
- Creating/Editing/Deleting Coupon Categories
- Approving/Denying Pending Coupons

ADDING COUPONS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**

- Using the Simpleview CMS Page Builder
- Adding Coupon Widgets to a Page
MODULES & TOPICS CONTINUED

**ADDING MEDIA TO ACCOUNTS AND LISTINGS**
- Adding a New Logo/Image
- Best Practices with Displaying Listing Images

**CREATING EVENTS FOR ACCOUNTS**
- Navigating Events
- Using Events Filters
- Modifying the Grid Settings
- Adding a New Event
- Approving/Denying a Pending Event
- Creating/Editing/Deleting Event Categories and Ranks

**ADDING EVENTS TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**
- Using the Simpleview CMS Page Builder
- Adding Events Widgets to a Page
- Reviewing the 'Submit an Event' Form

**CREATING AMENITIES FOR ACCOUNTS**
- Adding/Editing/Deleting Amenity Data on Accounts
- Understanding Differences Between Amenities, Tabs and Groups
- Developing New Amenities/Tabs/Groups in Admin

**ADDING AMENITIES TO YOUR WEBSITE VIA THE SIMPLEVIEW CMS**
- Reviewing Amenities on the Listing Detail
- Using Amenity Filters on the Listing Widgets

**REVIEWING AND USING THE BENEFITS SUMMARY**
- Adding In kind/Expenses
- Creating/Editing/Deleting In kind Expense Types and Payment Types
- Reviewing Leads Sent to an Account
- Reviewing Service Requests Sent to an Account
- Pulling Summary Reports on Events for an Account
- Reviewing Article Mentions for an Account
- Reviewing Web Site Data and Coupon Hits for an Account
- Reviewing Promotions/Advertising Associated with an Account
- Reviewing Involvement with FAMs and Site Inspections

**ADDING INVOICES TO YOUR ACCOUNTS**
- Navigating Invoices
- Using Invoices Filters
- Modifying the Grid Settings
- Reviewing Dues Information for an Account
- Adding Dues for an Account
- Adding Blank and Dues/Benefits Invoices to an Account
- Generating and Printing Statements
- Using the Dues Revaluation Tool
- Creating/Editing/Deleting Invoice Payment Types
ADDING PARTNER REFERRALS TO YOUR ACCOUNTS
- Navigating Partner Referrals on the Account Detail
- Adding a New Partner Referral
- Referral Contacts
- Sending Partner Notifications

ADDING NOTES TO AN ACCOUNT
- Navigating Notes on the Account Detail
- Adding a New Note
- Adding/Updating Note Categories
- Searching for Notes
- Printing Notes

ADDING COMMUNICATIONS TO AN ACCOUNT
- Reviewing Communications for an Account on the Account Detail
- Using Communications Filters
- Sending a Communication
- Developing Templates for Communications
- Using the Email Bounce Log

PULLING MEMBER/PARTNER DATA INTO REPORTS
- Creating Summary Reports
- Creating Summary Detail Reports
- Creating Cross-Tab Reports
- Scheduling Reports
- Sharing and Installing Reports

PULLING MEMBER/PARTNER DATA INTO REPORTS | ADVANCED TECHNIQUES*
- Creating Summary Reports
- Creating Summary Detail Reports
- Creating Cross-Tab Reports
- Scheduling Reports
- Sharing and Installing Reports

USING SEARCH TO FIND MEMBER/PARTNER DATA
- Navigating Saved Searches
- Using Searches Filters
- Developing a New Search
- Conducting a Global Search

USING ADMIN FEATURES TO ENHANCE MEMBER/PARTNER DATA AND WORKFLOWS
- Working with Custom Fields
- Reviewing and Developing Security Roles
- Developing Triggers
- Restoring Content in the Recycle Bin
- Managing Dropdowns

DEVELOPING FORMS FOR MEMBER/PARTNER DATA
- Using the Form Builder for Member/Partner Data
- Best Practices with Collecting Data, Preventing Duplicates

MODULES & TOPICS CONTINUED
CONNECTING MEMBER/PARTNER DATA TO YOUR MEMBERS AND PARTNERS VIA THE EXTRANET

- Logging into the Extranet
- Navigating the Extranet
- Using the Post Board
- Creating and Reviewing Partner Bulletins
- Using the Layout Manager
- Setting up Extranet Emails
- Using the Extranet Image Carousel

* Optional by Trainer’s Discretion - This cannot be removed from a training engagement unless the trainer chooses to do so because the client does not use this CRM feature/section.

** Optional - This can be removed if a client does not have our Simpleview CMS and is not interested in purchasing it.

Questions?
Contact accountmanagers@simpleviewinc.com or 520.575.1151