Getting Started Guide

Important: Hold the "Ctrl" key on your keyboard while clicking the "F" key to search this document.

SourceYourMeeting.com is designed to have minimal impact on your business process, by avoiding the rekeying of information, and to have the maximum impact on eliminating manual tasks and getting quicker responses from hotels. This document is intended to give you a snapshot of the most effective way to use the application.

Your feedback is at the core of the usability and efficiency of our design as well as features and future enhancement planning. We thrive on ideas and feedback that will help us continue to provide a great tool that helps you get your work done faster and more effectively. Our current mission consists of the following

A. **Learnability** – make it easy enough for a meeting professional to start applying it in less than 20 minutes;
B. **Memorability** – so easy that even with long periods between uses you can quickly begin benefiting again;
C. **Efficiency** – ability to perform tasks very quickly, with minimal clicks, and quicker than alternative methods

If you have suggestions or feedback that can help us help you please email them to Support@SourceYourMeeting.com.

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How it works?

1. Log in
2. Go to "Create Project
   a. Note 1: Prepare your Meeting Resume for distribution " (see **Create New Project Instructions** for a more detailed explanation)
   b. Note 2: On step 3, copy the "eRFI Link" that is provided and paste it into your Meeting Resume and save it before uploading it.
3. Upload your Meeting Resume (and up to one additional document)
4. Once you've clicked "Complete" at the end of the Create Project steps you reach the "Success" page.
   a. Here you are provided with an "eRFI Link". Click "Click to copy" button. This link is what the CVB and Hotel contacts will use to access the documents you uploaded and the eRFI response form.
5. Create an email using the Email Template (**Email Template for sending your eRFI Link - Microsoft Outlook (.oft)**) (You can also find a link to this on the "Success" page and the "Support" page)
6. Send the email with the "eRFI Link to your hotel, CVB, and National Sales (NSO) contacts. (DO NOT attach your Meeting Resume to the email as it is already available to them with the "eRFI Link")
7. That's it! **Now that you have your Meeting Resume out you can sit back and watch the responses appear on your Report Grids. Review the other Support documents to get more tips.**
   i. When the Hoteliers or CVBs click the link they will login with their email address and password (they can bid at no cost)
   ii. From the "eRFI Link" they will see the Meeting Resume you uploaded during the Create Project step as well as the "eRFI Response Form" which they use to bid.
   iii. As bids come in, or once you are ready to make decisions, you can use the Reports to view and compare the availability on an online Grid. Here you can sort and filter and export your filtered results it right to Excel with one-click
   iv. Use the Communications report to send quick emails to the hotel and CVB (bidders) contacts (in a mass email or just select contacts, and the recipient does not see the other people you distributed it too.)
   v. For more details on each step please see the Support Documents and Screencasts section below.

Additional Considerations:

1. For a **Meeting Resume Template (MS Word)** (many refer to as an RFP) that is designed specifically to reduce the number of calls and emails you get, as well as allow hotels to understand your needs best, visit the **"Support Documents"** on the Support Page.
2. We highly recommend you see the **SYM Tips & FAQ** provided under **"Support Documents"** on the Support Page before getting started.

Glossary:

Terms & Definitions

a) **Default Hotel eRFI Template** – Electronic Request for Information (eRFI) Form that hotels complete in response to your Meeting Resume. This is designed with fields that will allow you to monitor and compare bids quickly with the goal of getting to the short-list faster.

b) **Projects:**
   - Active – a meeting you are currently sourcing and will display on your Projects Active page.
   - Archived - a Project you have completed either because the hotel contract is executed or you are no longer sourcing the program. Archiving is primarily designed to allow you to move the project from your active projects page making it easier to navigate. You can still view all report data and other information when the project is Archived.

c) **Project Manager –** Meeting Professional who will serve as the primary contact for that particular meeting. Hotels see this email address on pages they access and see this information in their email confirmations as well. You can share (Link Users) to your projects from the "Project Details" page accessed on the Actions Menu.

d) **Referrer –** the resource you use to assist in qualifying properties you want to consider for hosting your meeting. Examples include the following:
   - **Convention & Visitors Bureau (CVB)** – advocate for the town, city, region or country they represent. Specific charters differ by organization but all focus on marketing their destination through travel and tourism. For you, this means they are a valuable resource and consultant who represents the destination but can provide you with information and sometimes funding to help you select their destination. Also called Destination Marketing Organization (DMO). DMAI.org is the organization that represents this industry.
   - **Hotel National Sales – (Also sometimes referred to as an NSO or International Sales Office (IS) or Global Sales Office (GSO)** typically this resource is dedicated toward finding the optimal fit for your meeting and can help you save valuable time in the process. They can also serve as the liaison between the planner and the properties being considered.

e) **User Types** *(See more about Users in the Managing MyUsers Instructions)*
   - **Administrator** – Person as the top level of the Organization's account. (See Administrator User section below).
   - **User** – A person who manages the RFP process at the same organization as the Administrator. This account is created by the Administrator**. Or this can be a third party or consultant you want to be able to have manage projects for you and you want to ensure their work is captured in your account.**

o **Guest User** – a person who can see the Quick Grid report for ONLY Projects you've shared (Linked) with them. (This could be a client, a person in another department, or a committee member for instance).

Support Documents and Screencasts

We have put together the following documents and screencasts to help answer any questions and to provide you with insights to get the most out of SourceYourMeeting.com. Please let us know if there is anything that needs more clarity or if you'd be interested in a live webcast to discuss features and functionality.

- Getting Started Guide: This document
- Instructions: Create New Project
- Instructions: Managing MyUsers (For Administrators)
- Instructions: Managing Projects and Reports
- Tips & FAQ
- eRFI Template Fields and associated reports

Note: Once you create a project do not select to unlink yourself from a project in the Actions menu. If you wish to keep your Active Projects window clean just Archive the project.