



Instructions – Managing Projects And Reports (Grid)

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

Once you’ve created a project the next actions are typically handled on the “Actions” on the “Project Details” page. And if you want to monitor responses to the eRFI you can use the View Reports tab.

If you think of additional ideas or want specific functionality please email us at Support@SourceYourMeeting.com

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Projects Page & Search for a Project

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ProjectID	Project Name	Manager	Project Created	Hotel Response Date	Locations	Actions	Reports
2016 CJS	2016 CJS Spring Meeting	Peter HanleyDEMO	2015-04-02 15:21:08	2015-04-17		Actions	Reports
72227m	TEST Sample Meeting Name 2016 sept 2016	Peter HanleyDEMO (hanley)	2015-07-10 15:55:42	2015-03-13		Actions	Reports
458649	DEMO ORG Meeting Name 2016 Annual	Peter HanleyDEMO	2015-03-16 11:14:02	2015-03-20		Actions	Reports

Search for a Project by scrolling typing in the box in that column for a key word or click on the column heading to sort.

If you know whether it is an Active or Archived project first select that option from the nav bar just below the Search field.

A. Actions Menu on Projects page

- *View Project Details*
- *eRFI Link for Hotels*
- *Archive Project*
- *Copy Project*

Project Details

B. Actions Menu on Project Details page

- *eRFI Link for Hotels*
- *Preview Hotel eRFI*
- *Copy Project*

C. View "Project Details"

This is provided for an overview of the project you created. You can view the following on this page:

- Meeting Name
- ProjectID



- Lead Creation Date
- **Hotel Responses Due Date – you can also extend or shorten the date by clicking “Extend Project Response Date button”**
- Link to the RFP And/Or 2nd document you uploaded when you created the project
- Email address provided when the project was created
- The Check-in and Check-out dates for each of the Preferred Dates you entered when you created the project.
- Linked Planners and Linked Guests (Report Users)
- The Reports button gives you access to the reports for this project.

D. eRFI Link for Hotels

This is the link that hotels will use to access the meetings specifications you uploaded when you created the project and the eRFI Form they will use to bid on your meeting. This same link was also provided to you when you created the project. It’s provided here in case you didn’t copy it when the project was created or you need to send it to additional hotels, CVB’s or Hotel National Sales offices.

E. Preview Hotel eRFI

This option allows you to display exactly what the hotel will see when they click on the eRFI Link for your project.

F. Extending a project close date

If you want to give hotels more time to bid on your program then click the Extend Project option on the Project Details page (reached through the Actions menu).

Note: If your meeting specifications change or you made an error creating your project please see SYMTips document: “If your meeting dates or specifications change or if you make an error or change after creating your project or distributing your eRFI.”

A frequently asked question is: When the Hotel Response Date passes can the hoteliers see the eRFI Form, access the RFP or still bid?

- A. No but you can extend that day. If you wish to give the Hotels more time then all you have to do is select “Extend Hotel Response Date” from the Actions menu on the “Project Details” page. From a strategy standpoint...we find users are using this two ways:
- Some users are very strict with this date and communicate it clearly to hotels by letting them know that they will be unable to take responses after #:## pm on DATE. And they set the SYM Hotel Response Date as the same date.
 - Others provide the same message but the date they enter in the SYM Hotel Response Date is a few days or a week later. In this case it allows hotels to actually submit responses late but you at least still tell them a date you want responses by.



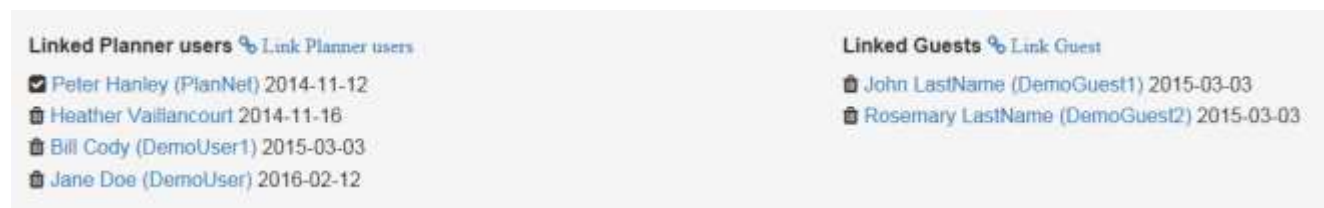
G. Copy Project

This option allows you to duplicate most of the information related to the project and upload new RFP documents.

H. Link or Unlink Users to a Project

Users to create a project can automatically see their own projects on the Projects page. In order for other users to see reports or other information related to your project the project must be Linked to that person. This is very simple.

1. Click "Projects" in the Navigation bar at the top of the page
2. Go to the project you wish to Link and pull down the "Actions" menu and select "Project Details"
3. On the Project Details page click "Link Planner Users" or "Link Guest" and select the person you wish to share the project with.
4. To unlink a User from your project click the trash can icon to the left of their name.



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.

I. Archiving or activating a project

To keep your Active Projects page more manageable archive projects that are complete. Typically this is done after the hotel contract is signed. All archived project data is saved and can be retrieved whether it is Archived or Active.

J. Notes

For internal Collaboration between the SYM Users in your account. This information is NOT shared with anyone other than the Users on the MyUsers page of your Account Admin.

K. Logs


Tracks Communication Report emails, Changes in the Hotel Response date and more.



Reports Menu



 Quick Report Grid

 Hotel Communication Report

 All Data Report (Excel ONLY)

 Bidders **25**

A. Quick Report (Standard Report)(Online Grid & 1-click to Excel)

This is your default Grid. You can adjust the display results by filtering a column or selecting a larger number in the pull down menu at the bottom of the grid. Once you have the Grid filtered or sorted the way you wish you can export it to Excel with one click of the Excel icon in the bottom left.

This is primarily used for:

- Evaluating the progress of hotel bids after having sent the eRFI.
- Compare hotel bids

Fields on this report are in the following order:

- ProjectID
- Hotel Name
- Brand/Flag
- Availability
- CheckinDate
- CheckoutDate
- Space Held
- Rate
- F&BMin
- Currency
- Comment Field (Tell Planner More)
- Hotel City
- Hotel State
- Postal Code
- Hotel Country
- Closest Airport
- Miles to Airport
- Guest Rooms
- Group Ceiling



- Website Hotel
- Meeting Room Rental
- Meeting Rental Comment

B. Hotel Communication Report (Online Grid & 1-click to Excel)

This report is ideal for the following:

- **Emailing Hotel contacts** and the Referrers (CVB & NSO contacts) to give them a status update on the decision making or changes. (Sort for the Group and Dates first, then click the email option that works for you). The Distribution list is not shared with the recipients.
- Mail merge for sending communications to hotel regarding the status of your decisions or updates on the program.
- Mail merge for sending communications to Referrer's (CVB and/or Hotel National Sales offices)

Fields on this report are in the following order:

- ProjectID
- Hotel
- Brand/Flag
- Availability
- CheckinDate
- CheckoutDate
- Space Held
- Rate
- F&BMin
- Currency
- Comment Field (Tell Planner More)
- Hotel City
- Hotel State
- Hotel Postal Code
- Hotel Country
- Hotel Sales Contact
- Hotel Sales Contact Phone
- Hotel Sales Contact Email
- NSO Email
- CVB Email
- Hotel Owner
- Hotel Management Company
- Hotel Website
- Hotel Mtg Space URL



- Uploaded File link (From hotel)
- Date eRFI Submitted by hotel
- Time eRFI Submitted by hotel

C. All Data Report (Excel ONLY)

This report immediately exports all bid data directly to Excel for your own custom manipulation