simpleview

CRM Upgrade from Web-Only to Basic
City of Manitowoc Tourism Department - Visit Manitowoc
July 25, 2022
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Objective

In this work order, Simpleview will upgrade City of Manitowoc's CRM level from Web-Only to Basic. The upgrade will be implemented with the listed changes below to reflect the upgraded tier.

Specifications

Following the specifications outlined below, the **Simpleview CRM Basic Tier Includes:**

	Web Only	per user/ Basic	
			Comments
Users	**1-5**	**1-5**	
IMPLEMENTATION	$0	~~$8,600~~ $1,500	Includes system configuration, user configuration, and standard reports.
- Data Migration/ Import	TBD	TBD	"Per User" data migration/ import options; no import (start with a clean database), customer imports or inputs data, or Simpleview can import data for a fee based on quantity and quality of data sources.
- Custom Reports	TBD	TBD	Simpleview will create or migrate all custom reports, or make changes to standard reports, as prescribed by the customer, up to the total implementation hours, less hours used for Data Migration and Training.
BRAINERY AND TRAINING *Travel & Expenses are billed separately.	N/A	Not Included	$3,000 / Year
- Included Remote Training	16 hours of remote	16 hours of remote	Remote training will be conducted in a minimum of 4 hour blocks and will be provided via Zoom or Google Meet.

- Included Onsite Training Days	N/A	6	Onsite training at Simpleview office (Tucson, AZ or Pittsburgh, PA) is free and unlimited (normally $1K / day) minus Travel & Expenses per training. *Travel & Expenses are billed separately. **Purchased training days at your office can be used any time during a 3-year term. Training at your office must be booked in blocks of at least 2 or more days (3 or more days for Enterprise). Unused training cannot carry over to the new contract term.
- Additional Onsite Training	Recommend 2	Recommend 2	On site: $2,000 per trainer per day; two day minimum; travel and expenses billed separately.
- Simpleview Hosted Training	Recommended as a supplement to Onsite Training	Recommended as a supplement to Onsite Training	At Simpleview's headquarters in Tucson, AZ: $1,000 per trainer per day. No minimum; travel expenses are the responsibility of the customer.
- Included Brainery Certifications	N/A	Unlimited with purchase of Trainery Package	Unlimited Brainery includes unlimited access to each course's curriculum. 1 exam and 1 retake are allowed per course per calendar year
LICENSING, HOSTING & UPGRADES	**$1,250/user/year**	**$1,250/year + $1,250/user/year 3 users = $5,000 / year**	**Annual fee includes point updates, full version upgrades, hosting, daily back-ups, and access to the Simpleview ticketing system, knowledgebase, webinar library, and user forum.**
- Additional Users Above Tier	$1,250 / year	$1,250 / year	
SUPPORT			
- Free Support*	0	10 hours / user / year	Support hours can be used for technical support, questions, remote training, report building, template creation, or customizations.
- Additional Support			
- Premium Bundle	$10,000 / 100 hours	$10,000 / 100 hours	Free Support and Bundles can be used at any time within a given contract term. Bundles
- Discounted Bundle	$6,000 / 50 hours	$6,000 / 50 hours	can be purchased at any time during an initial or renewal term, but do not carry forward from one term to the next.
- Hourly Support	$125 / hour	$125 / hour	
USER GROUPS, MODULES & OPTIONS			

GROUP SALES	NA	Included	Facilitates Meeting and Conference Sales, but can also be used for Sports Marketing, Meetings & Reunions, and Film Offices, with separate Groups created for each department.
- Facility Calendar	NA	Not Included	$7,500 set-up + $2,500/year. This allows CRM users to view and reserve available space in convention centers and other meeting venues.
- Meeting Planner RFP Tracking	NA	Not Included	$3,000 set-up + $1,000/year. Meeting Planners and Tour Operators may log in to review RFP responses (including service lead responses). Custom skinned extranet requires additional $5,000 design and implementation fee.
MEMBER / PARTNER	Included	Included	
- Benefits Summary	Included	Included	This provides a place for both you and your partners to review all the benefits they receive by partnering with your DMO. All information, such as the number of leads you have sent to the partner, articles documented, listing and coupon hits, in-kind/expenses and more are stored on the Benefits Summary tab.
- Member/ Partner Extranet	Included	Included	A dedicated, password-protected site where members/partners can update listings, add images, submit special offers, view leads, report occupancy and view news and information provided by the DMO.
- Skinned Member/ Partner Extranet	Not Included	Not Included	$5,000 set-up. Fee covers styles and logos applied to the extranet to match your website design.
- Dues & Invoicing	Not Included	Not Included	$3,000 set-up + $1,000/yearThe Dues & Invoicing section gives you the ability to set up membership dues, add benefits, create membership invoices and one-off invoices, and streamline payment collection from your partners.
- Online Dues Payment	Not Included	Not Included	Requires Dues & Invoicing Line Item
MarketPlace (1 form Execution)	Included	Included	
-3 Form Execution	Not Included	Not Included	$3,600/year
-Unlimited Forms	Not Included	Not Included	$7,200/year

PARTNER SERVICES	Included	Included	Allows users to send service leads, track partner referrals, record Inkind/Expense transactions with partners, and manage commitments or incentives offered by the DMO.
CONSUMER	Included	Included	
- DMA® Regions Mapping	Included	Included	(Designated Market Area) regions are the geographic areas in the United States in which local television viewing is measured by The Nielsen Company. The DMA data are essential for any marketer, researcher, or organization seeking to utilize standardized geographic areas within their DMO and Simpleview is the only industry specific CRM provider with a license to use this data.
TOUR/ TRAVEL TRADE	NA	Included	Facilitates Group Tour, Motorcoach, and Independent Travel booked through third parties.
MEDIA / PR	NA	Not Included	$1,500 one-time + $500 per year per user. This module is used to manage media contacts, issue press releases, distribute press trip leads and track coverage of your destination and partners.
INVENTORY	NA	Not Included	$1,500 one-time + $500 per year per user. Allows users to easily manage products, view/update inventory, place orders, and streamline order processing. Orders can be tied to partners, clients, and events tracked in CRM.
SITE INSPECTIONS / FAMS	NA	Included	Facilitates the creation and distribution of detailed itineraries for FAM Tours and Site Inspections. Then, automatically, tracks the exposure provided to participating Members / Partners.
DMO HOSTED EVENTS	Included	Included	Allows for the tracking of participation at Bureau hosted networking events, workshops, etc. RSVP Integration is required for online registration and payment associated with events.

- Eventsforce RSVP Platform + Simpleview CRM Integration *Up to 1,000 annual meeting attendees	Not Included	Not Included	$3,500/year. Pricing options available for [above 1,000 meeting attendees per year here](). Whether your events are virtual, hybrid or in-person, Eventsforce Registration is a secure event management platform that allows you to launch events quickly and create a more seamless experience for your attendees - from invitations and websites to personalized registration journeys, apps and contactless check-in. The Eventsforce integration in CRM enables a DMO to power their events with attendee information from Simpleview CRM while leveraging Eventsforce event registration capabilities
CO-OP MARKETING & ADVERTISING	NA	<mark>Included</mark>	This module provides the ability to add and track advertisements that your partners purchase.
DATA INTEGRATION TOOLS			
FORM INTEGRATIONS			This is used to create and edit quick data entry forms for Accounts and Contacts within CRM and/or to manage web forms when combined with a Simpleview website.
- Form Builder	Included	Included	The Form Builder allows for easy creation of fillable forms so that users can submit data into most CRM groups. Forms can then be dropped onto a Simpleview CMS website via widget and a single click.
- Form API	Not Included	Not Included	$3,000 set-up + $1,000/year. The Forms API is required in order to publish forms to a website developed by a third party.
- RFP Integration	Not Included	Not Included	$5,000 set-up + $1,500/year (2 forms). This specialized form provides a step by step process for submitting an RFP and includes a basic facility search, room flow, the ability to include attachments, and... Includes integration with one group (Group Sales by default). Additional forms can be added for $2,000 each.

WEB API			The API or Data Feeds are required for 3rd party integration. The API provides full "push/ pull" connectivity between CRM and applications developed by 3rd parties, including documentation and support to allow developers the ability to call data from the database *as well as* provide tracking information back to the Member/ Partner Benefits Summary for websites, mobile sites, kiosks, etc.
- Listings & Special Offers API	Not Included	Not Included	$7,500 + $2,500/year
- Calendar of Events & API	Not Included	Not Included	$7,500 + $2,500/year
DATA FEEDS			Unlike the API, this is a one-way feed that allows 3rd parties to consume data in a structured, but raw format, and information *cannot* be fed back to CRM for Benefits Summary Tracking.
- Listings Feed	Not Included	Not Included	$600/ feed / year
- Calendar of Events Feed	Not Included	Not Included	$600/ feed / year
- Special Offers Feed	Not Included	Not Included	$600/ feed / year
3RD PARTY INTEGRATIONS			
- Meeting Broker Integration	NA	Included	Meeting Broker Integration to push/ pull leads and responses to/ from New market International's Delphi and Daylight sales & catering systems for hotels.
- MINT Integration	NA	Included	Assuming the client is subscribed to the MINT+ Platform, the integration with Simpleview CRM is free. The MINT+ Platform itself is a licensed product with its own cost. Learn more here: https://www.simpleviewinc.com/products/mint/
- EmpowerMINT RFP Integration	NA	Not Included	$5,000 + $1,500/year
- Venue Ops / EventBooking *View Only* Calendar Integration	NA	Included	Single Sign On integration allows authorized users to view the VenueOps availability calendar from Simpleview CRM/DMS. (Enhanced integration, with bi-directional data sync, available for an additional fee.)

- Venue Ops / EventBooking CRM Integration	NA	Not Included	$15,000 set-up + $7,500/yearOffered by EventBooking, VenueOps is an intuitive, cloud-based venue management and booking application designed for conference centers, performing arts centers, arenas, and stadiums. This paid feature provides real-time CRM Lead syncs between the EventBooking software and your Simpleview CRM if your destination currently subscribes to VenueOps. Once enabled, the integration allows the creation of Inquiries in VenueOps based on information set within CRM Leads. Additionally, as the VenueOps Inquiry becomes a booked Event, the status of its corresponding CRM Lead also changes.
- DMAI Event Impact Calculator	NA	Not Included	$0 + $500/year. DMAI Event Impact Calculator Integration. Report integration billed separately or can be implemented against Support Hours.
-CVENT Integration	NA	Not Included	$1,200/year
- ICCA Database Import Tool	NA	==Included==	Tool for importing Excel Files containing profiles and history/futures that were exported from the ICCA database.
- Accounting System Integration	NA	TBD	Data can be pulled from accounting systems into CRM so Member/Partner staff can view invoices, payments and balances. Users can also resend invoices directly from CRM.
- Outlook Integration	NA	Not Included	$1,500/year. This allows you to easily push emails from Outlook to CRM. Stand alone work order here.
Act-On Email & Marketing Automation Integration	Not Included	Not Included	Packages starting at $1000 and $4400/year (Based off active contacts not number of emails sent)
AudioEye - Digital Accessibility Compliance	Not Included	Not Included	Packages starting at $12000/year (less if leveraging SV CMS)
Simpleview DAM - Full Service DAM	Not Included	Not Included	Simpleview DAM, a simpleview company is a full service DAM that integrates seamlessly with SV tech stack. Packages starting at $1000 and $8000/year - based on storage and access needs.

Quickbooks Integration (*Currently only compatible with Quickbooks **Desktop** Pro; not the web version)	Not Included	Not Included	$5,000 set-up +$1,500/year. We offer a one-way integration with Quickbooks wherein the invoice and payment details FROM Quickbooks flows TO Simpleview CRM. This allows CRM users to view the status/history of invoices and payments within the CRM. (NOTE: The CRM 3.0 integration is only compatible with the desktop version of Quickbooks [Quickbooks Desktop Pro].)
Set-Up Fees	-	~~$8,600~~ **$1,500**	
Core Baseline Cost (Year 1)	**$2,400**	**$5,000**	

Cost Summary

The cost outlined below includes the project management fee, implementation, training and licensing. The quote is valid for thirty days. Any change or addition to the above scope of work will result in the creation of a new work order.

CRM Upgrade from Web-Only to Basic (08/01/2022 - 07/31/2025)			
	One-Time	**Annual**	**Total**
CRM Web-Only Annual Cost			**$2,400/year**
Upgrade to CRM Basic	~~$8,600~~ **$1,500**	+$2,600	
Total Costs	**$1,500**		**$5,000/year**

Moving Forward

In order for Simpleview to proceed with the project execution, we will need your signature accepting the project and budget.

_____ _____

Authorized Signature (required to begin work)   Today's Date

_____ _____

Printed Name   Organization

Please email the completed form to celeste.peeler@simpleviewinc.com

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