



**Member Extranet
Meeting Sales Leads**

<http://www.valleyforge.org/extranet>

**Valley Forge Convention and Visitors Bureau
1000 First Ave., Suite 101
King of Prussia, PA 19406
www.valleyforge.org**

Section III - Reviewing Meeting Sales Leads

Upon logging in, you will be taken to your home screen (Member Records). Select “Leads” from the main navigation bar. Select **Meeting** under –All Groups– for Meeting Sales Leads.

1. Under **Filter**, you can filter on the following:

Any Status – All Leads will show

New – New Lead for which the response date has not passed.

(When a new Lead is available, the CVB will send you an email message informing you of the new Lead)

Pending – The member “Respond By” date has passed

(Lead can be viewed but Response tab no longer appears. Please call the CVB rep to see if a manual response is possible)

Closed/Won – Your property / venue won the business.

Closed/Lost – Lead is lost, cancelled or is definite but you are not the selected hotel / venue.

Closed/TBD – Client has selected the area, but a headquarter hotel / venue has not been selected.

NOTE: There may be instances where a member property is added to a lead a few weeks or month after it is initially created. In this case, it may not appear in the top 10-15 listed leads. The notification email should provide enough information to find the lead. Use of the **Filter** or **Search By Keyword** will be helpful in these cases.

Valley Forge - CRM

Welcome, Test Test - Logged in to: Valley Forge Convention and Visitors Bureau

Logout

Leads | Member Record | Occupancy | Service Requests | Partner Bulletins

ALL LEADS - CURRENTLY 2 IN VIEW

Filter: New --All Groups-- --All Responses-- Search By Keyword

Starts With: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other: All

Lead Type	Opportunity ID	Opportunity	Organization	Hotel Response Date	Arr/Dept Dates	Status	Responded	Create Date
Convention/Meeting Sales	13653	Valley Forge Extranet Training	Bradley Test File	11/30/2012	Jan 1-11, 2013	New	No	05/03/2012
Tour & Travel	12143	Valley Forge Bus Tour	Valley Forge Test	07/01/2012	Aug 1-13, 2012	New	No	05/07/2012

Number of Results: 25

Leads | Member Record | Occupancy | Service Requests | Partner Bulletins

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2. You are able to sort your list of leads by clicking on any of the column headers (ie. Meeting Name, Organization, Hotel Response Date, etc.)

3. Select “New” to show the new Leads for your establishment.

ALL LEADS - CURRENTLY 2 IN VIEW

Filter: New --All Groups-- --All Responses-- Search By Keyword

Starts With: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other: All

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Number of Results: 25

4. Click on the Opportunity (**Lead**) ID or Name to open the detail and to respond to a lead.

Opportunity Detail

Confidential Leads – If a client has requested that we collect proposals on their behalf and do not wish to be contacted by individual properties, the CVB will mark the lead as Confidential and no client information will appear in the **Contact** section.

OPPORTUNITY DETAIL (NEW): VALLEY FORGE EXTRANET TRAINING

Opportunity Information

Opportunity ID: 13653
 Meeting Name: Valley Forge Extranet Training
 Account: Bradley Test File
 Contact: David Bradley
 XXX
 XXX, PA 11111
 UNITED STATES
 bradley@valleyforge.org

Type: Trade Show
 EET Type: Meeting Default EET

Decision Making Process: New
 Status: 12-31-2012
 Hotel Response Due: 11-30-2012
 Repeat Business: No
 Sales Manager: David Bradley
 bradley@valleyforge.org
 610.834.7972

Profile: Dave
 3rd Party Meeting Planner:
 3rd Party Meeting Planner Contact:

Source Code: Valley Forge CVB
 Market Segment: Corporate
 Meeting Pattern:
 Room Attendees: 1
 Show Attendees: 1
 Site Inspection? No
 Confidential: No

Arrival Dates

Preferred Date: 1/1/2013 - 1/11/2013
 Alternate Date:
 Alternate Date:

Room Summary

Requested Rooms							Totals and Peak	
Tue	Wed	Thu	Fri	Sat	Sun	Mon	Requested Rooms:	Peak Requested:
01/01	01/02	01/03	01/04	01/05	01/06	01/07	500	50
50	50	50	50	50	50	50	Additional room requests/needs	
100%	100%	100%	100%	100%	100%	100%		
Tue	Wed	Thu	Fri	Sat	Sun	Mon		
01/08	01/09	01/10						
50	50	50						
100%	100%	100%						

History/Futures

Dates	Month	Year	City	Hotel	Contract Rooms	Pickup Rooms	Rate	Attendees
04/19/2010 - 04/20/2010	April	2010	King of Prussia	Valley Forge Convention and Visitors Bureau	2	0	\$0.00	0

Additional Fields

General

Expo Center: No
 Services Needed
 Exhibitors

Responses

Add / Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	01/01/2013 - 01/11/2013 (Primary)	01/01/2013 - 01/10/2013	No Response Entered			No

1. All responses must be entered by the **Hotel Responses Due Date**.
2. **Action Requested** – Specific action required or instructions to CVB members.
3. **Arrival Dates** (Preferred & Alternate Dates) – If there is more than one set of dates to respond to, both the Preferred and Alternate Dates will be filled. Please respond to all set of dates. If you cannot offer room block for any set of dates, respond “No” to pursuing and note in the Comment section why. (After clicking “**Add Your Response**”)
4. **Room Summary** - Requested rooms for each night of the block are outlined with Totals and Peak rooms listed.
5. **History / Futures** – Available historic or future information on definite business leads associated with the account to help with decision making on pursuing the opportunity.
6. After reviewing the Lead click “**Add Your Response**” to respond to the lead.

Items in **RED** are required fields.

Select **Yes** or **No** to indicate if you are pursuing the Lead.

Response Information

Pursuing this lead? Yes No

1 → **Comments:** [Text Area]

Bureau-Only Comments:
These comments will not be seen by the client; they will only be seen by the staff of Valley Forge Convention and Visitors Bureau.

2 → **Rate Range** 0 to 0

Requested Rooms 0 **Peak Night Rooms** 0

3 → **Room Information**

	Tuesday 01/01/2013	Wednesday 01/02/2013	Thursday 01/03/2013	Friday 01/04/2013	Saturday 01/05/2013	Sunday 01/06/2013	Monday 01/07/2013
Singles	0	0	0	0	0	0	0
Doubles	0	0	0	0	0	0	0
1-Bed Suites	0	0	0	0	0	0	0
2-Bed Suites	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0
Requested	50	50	50	50	50	50	50

	Tuesday 01/08/2013	Wednesday 01/09/2013	Thursday 01/10/2013	Friday 01/11/2013	Saturday 01/12/2013	Sunday 01/13/2013	Monday 01/14/2013
Singles	0	0	0				
Doubles	0	0	0				
1-Bed Suites	0	0	0				
2-Bed Suites	0	0	0				
Total	0	0	0	0	0	0	0
Requested	50	50	50	0	0	0	0

4 → **File Attachments**

File Attachments: --None--

1. **Comments** section can be used to respond to any specifics from the Lead. If you are not pursuing the lead, please indicate in the Comments section the reason.
2. **Rate Range** – Enter the rate you are offering. The Requested and Peak Night Rooms will auto-populate from information entered into the next section.
3. **Room Information** – Enter the number of rooms you have available for each room type. If the lead requested a specific room type, only fill in that type.
4. **File Attachments** – You can attach files which will be sent to the Valley Forge CVB. The CVB will decide whether to pass these files to the meeting planner. Click **Add**, when another window appears; click **Browse** (find file), click **Add File** and then **Close** to save.

NOTE: You will only be able to add or edit comments until the Response Date. After that date, you can only view your response(s) and will not be able to add or edit new one. In the case of a passed **Response date** or **Confidential Lead**, please call the CVB to see if you may still submit a proposal.