



**Member Extranet
Tour & Travel 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 IV - Reviewing Tourism Sales Leads

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

1. Under **Filter**, you can filter 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 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.

ValleyForge - 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 --Any Status-- --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
Conv	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.

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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

OPPORTUNITY DETAIL (NEW): VALLEY FORGE BUS TOUR

Opportunity Information

Opportunity ID: 12143	Status: New
Company: Valley Forge Test	Last Updated: 05/07/2012 "Lead Status"
Tour Name: Valley Forge Bus Tour	Primary Type:
Sales Manager: John Lam jam@valleyforge.org 610.834.7966	Contact: Tom Haberland
Arrival/Departure: 8/1/2012 - 8/13/2012	Decision Date:
Hotel Response Date: 07-01-2012	Source Code: --None--
People: 150	Nights: 0
Lost Code:	Market Segment: --None--
Client Type:	Hotel Type:
Company Profile:	
Comments:	
Meeting Specification Files: --None--	

Requested Rooms

Rooms:	Singles 25	Doubles 50	Total Requested 0
	Multiple 25	Kings 50	
	Suites 0		

Additional Fields

General

Members Booked	Arrival Date
Departure Date	Min Number of People
Max Number of People	Min Number of Rooms
Max Number of Rooms	TRN
Itinerary	Needs
Date Lead Sent: 05/31/2012	

Responses

Add/Edit	Arrival - Departure	Responded	Last Updated	Comments	Attachments
Add Your Response	08/01/2012 - 08/13/2012	No Response Entered			No

1. All responses must be entered by the **Hotel Responses Due Date**.
2. **Comments** – May provide more information regarding contact or tour.
3. **Requested Rooms** – Valley Forge CVB will provide as much information from the client as possible. In most cases, the number of rooms required will be approximate.
4. **Additional Fields** – Recorded in this area if other details / information are available.
5. 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.

The screenshot shows a web form titled "Response Information". At the top, there is a section for "Pursuing this lead?" with radio buttons for "Yes" and "No". Below this is a "Comments" text area, with a red box and arrow labeled "1" pointing to it. Underneath is a "Bureau-Only Comments" section with a red warning: "These comments will not be seen by the client; they will only be seen by the staff of Valley Forge Convention and Visitors Bureau." Below that is the "Room Information" section, which includes a "Rate Range" field (0 to 0) with a red box and arrow labeled "2". The "Room Breakdown" section has a table with columns for "Singles", "Doubles", "Multiple", "Kings", and "Suites", each with a numeric input field (0). A red box and arrow labeled "3" points to this section. The "File Attachments" section at the bottom has a dropdown menu showing "--None--" and buttons for "Add", "View", and "Remove". A red box and arrow labeled "4" points to this section.

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 why (no availabilities, two night minimum, etc.).
2. **Rate Range** – Enter the rate range you are offering.
3. **Room Breakdown** – Enter the appropriate room info you are offering the client.
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 this 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.