



**Member Extranet
Service Requests**

<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 V – Service Requests

Upon logging in, you will be taken to your home screen (Member Records). Select “**Service Requests**” from the main navigation bar.

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

Any Status – All Service Requests will show

New – New Service Request 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 Service Request)

Pending – The member “Respond By” date has passed.

(Service Request 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 – Request is lost, cancelled or is definite, but you are not the selected property / venue.

The screenshot shows the Valley Forge CRM interface. At the top, there's a navigation bar with tabs: Leads, Member Record, Occupancy, Service Requests, and Partner Bulletins. The 'Service Requests' tab is active. Below the navigation bar, there's a header for 'ALL SERVICE REQUESTS - CURRENTLY 2 IN VIEW'. A filter dropdown is open, showing options: Any Status, New, Pending, Closed/Won, and Closed/Lost. Below the filter, there's a table with columns: Request ID, Service Request, Contact, Lead, Type, Deadline, Status, and Responded. Two rows of data are visible. A red box labeled '1' points to the filter dropdown, and another red box labeled '2' points to the table columns.

Request ID	Service Request	Contact	Lead	Type	Deadline	Status	Responded
422	Service Request Test	Kelley Mishler		Transportation Request	07/01/2012	New	No
282	Unger/Bowling/Wedding/Transportation	Fouzla Abidi				Closed/Won	No

2. You are able to sort your list of requests by clicking on any of the column headers (i.e. Request ID, Service Request, Contacts, etc.)
3. Select “New” to show new Service Request for your establishment.

The screenshot shows the Valley Forge CRM interface with the filter set to 'New'. The header now says 'ALL SERVICE REQUESTS - CURRENTLY 1 IN VIEW'. The table shows one row of data. A red box labeled '1' points to the filter dropdown.

Request ID	Service Request	Contact	Lead	Type	Deadline	Status	Responded
429	Service Request Test	Kelley Mishler		Transportation Request	07/01/2012	New	No

Service Request Detail

All responses must be entered by the **Deadline Date**.

Request Information

Request ID: 432
 Account: Weddings and Events 2012
 Lead: --None--
 Request Name: Food Service
 Date(s): 06-11-2012 - 06-12-2012
 Time(s): 09:00 AM - 05:00 AM
 Deadline: 06-11-2012

Request Type: Restaurant / Catering
 Request Status: Lead
 Attendees: 100
 Budget: \$1,000
 Location: Expo Center

Description/Notes: Catering services needed for 100 attendees.
 Additional Documentation: --None--

Contact Information

Contact: Kelley Mishler
 Title: Service Manager
 Company: Weddings and Events 2012
 Phone: (610) 834-7976
 Fax:
 Email: mishler@valleyforge.org

Address: 1000 First Avenue, Suite 101
 City: King of Prussia
 State: PA
 Zip: 19406
 Country: UNITED STATES

Responses

Add/Edit	Start Date- End Date	Responded	Last Updated	Comments
Add Your Response	06/11/2012 - 06/12/2012	No Response Entered		

[Return](#)

1. **Lead** – If the Service Request is associated with a Lead, the name of the Lead will appear here.
2. **Additional Information** – Any additional information such as number of attendees, budget or location the contact has provided to the CVB.
3. **Description/Notes** – May provide more information regarding service request.
4. **Additional Documentation** – If a client has provided the CVB with additional documentation, we will attach to the Service Lead. Any documentation can be viewed by clicking on its link.
5. After reviewing the Lead, click “[Add Your Response](#)” to respond to the lead.

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 ones. In the case of a passed **Deadline Date**, please call the CVB to see if you may still submit a proposal.

Items in **RED** are required fields.

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

RESPONSE: NEW RESPONSE

Save Close

Colored fields are required.

Response Information

Pursuing this lead? Yes No

1 → Comments:

Bureau-Only Comments:

2 → File Attachments: --None--

Add View Remove

Additional Information

General

Save Close

1. **Comments** section can be used to respond to any specifics from the Service Request.
2. **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.