



**Member Extranet
Logging In and Getting Started**

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

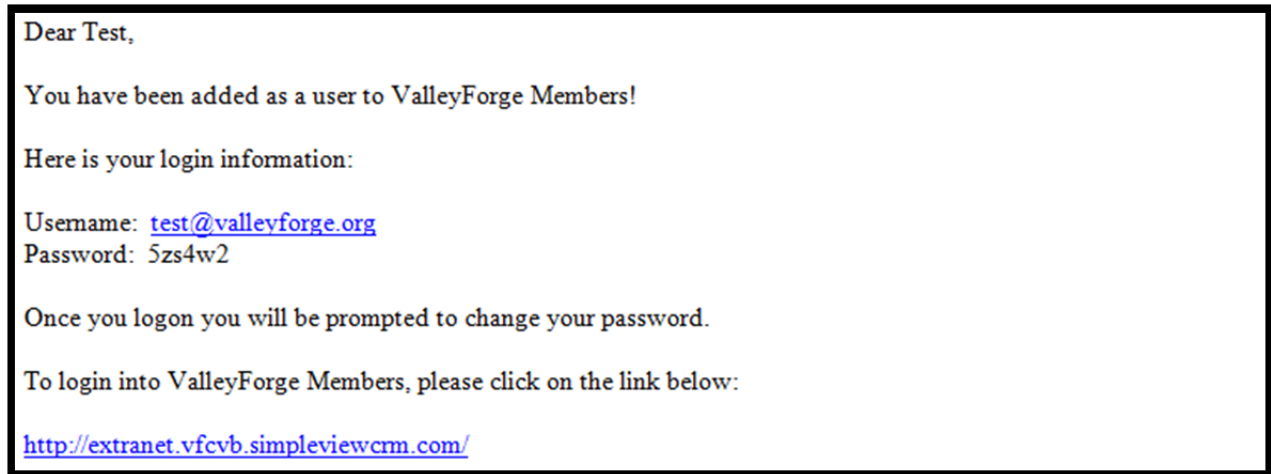
**Valley Forge Convention and Visitors Bureau
1000 First Ave., Suite 101
King of Prussia, PA 19406
www.valleyforge.org**

Section I - Logging In and Getting Started

(First time or after a password reset):

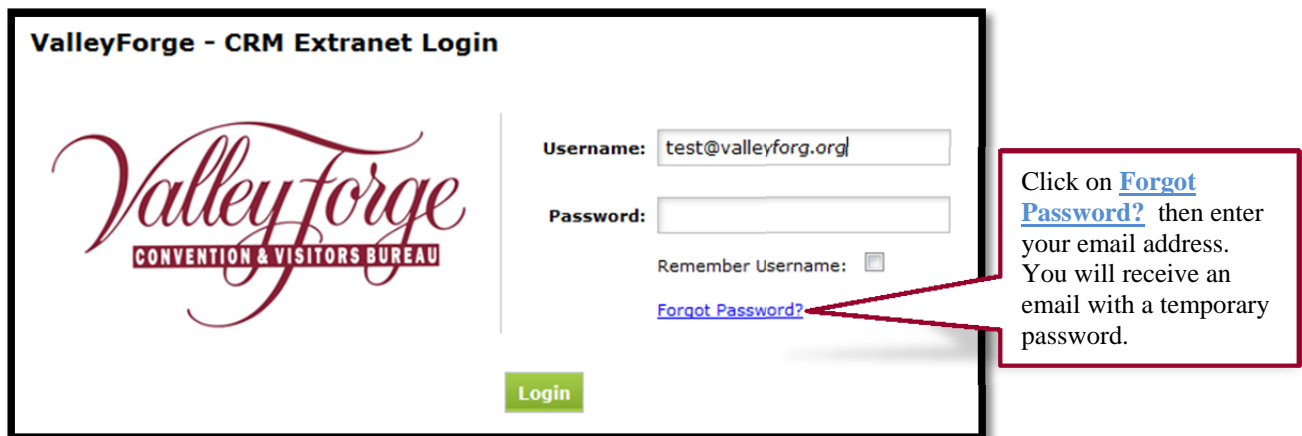
Members will receive an email similar to the one shown below from the Membership Staff. The **username** will always be the email address used for communication between the members and Valley Forge CVB. A **temporary password** will be assigned, but it is required that you change this password the first time logging in or after a password reset.

The web address is provided within the email. - <http://extranet.vfcvb.simpleviewcrm.com/> or <http://www.valleyforge.org/extranet>



Copy and Paste the link above or click on it to bring up the web site on your browser. You will be taken to the login screen.

1. Enter your email address as the Username.
2. Enter your temporary password provided in the email.



After logging in, a change of password is required on a following screen. This will become your **permanent password**.

NOTE: If there is still an issue with logging in, please contact the Membership Staff (See **FAQs**).



**Member Extranet
Member Record**

<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 II - Member Record

You can view four items under your Member Record:

1. Contacts
2. Listings (on www.valleyforge.org)
3. Web – Media (Pictures and Logos)
4. Amenities

Section II.1 - Contacts

1. To update your contact records, click the “Edit” / **Pencil Icon** to the left of the appropriate contact.
2. To add a new Contact, click on the “**Add New Contact**” button on the right side above the contact listing.
3. You can also “clone” a contact by clicking on the **Double Window Icon** link to the left of a current contact (this will make a duplicate of that contact), then change the information that needs to be updated (name, e-mail, phone number, etc.).

ValleyForge - CRM

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

Logout

Leads Member Record Occupancy Service Requests

ACCOUNT DETAIL: VALLEY FORGE CONVENTION AND VISITORS BUREAU

Account Information

Account ID: 15104	Status: Active
Account: Valley Forge Convention and Visitors Bureau	Region: Montgomery
Account (sort): Valley Forge Convention and Visitors Bureau	Email: info@valleyforge.org
Parent:	Web Site: http://www.valleyforge.org
Formerly:	

Phone/Fax Numbers

Primary: 610.834.1550	Alternate:
Tollfree: 888.847.4883	Fax: 610.834.0202

Address Information

Physical Address	Billing Address	Shipping Address
1000 First Ave Ste 101 King of Prussia, PA 19406 UNITED STATES	1000 First Ave Ste 101 King of Prussia, PA 19406 UNITED STATES	1000 First Avenue Suite 101 King of Prussia, PA 19406 UNITED STATES

Additional Fields

General



MemberRSVP

Omit from map? Yes

Contacts Listings Web Amenities

Filter: --Any Type--

Page 1 of 1

Action	Contact ID	Contact Name	Title	Email	Phone	Type
	6575	David Bradley	DOCS	bradley@valleyforge.org	610.834.1550	Primary
	6976	Mark Zimmerman	Senior Vice President	zimmerman@valleyforge.org	610.834.1550	Primary

2

3

4. When adding a new contact, please fill in all available fields. Fields in **RED** will be required.

CONTACT: UPDATE CONTACT FOR VALLEY FORGE CONVENTION AND VISITORS BUREAU

Save Save & New Contact Cancel

Colored fields are required.

Contact Information

First/Last Name: Test Test

Full Name: Test Test

Department:

Preferred Method: --None--

Assistant:

Children:

Gender: ☐ Male ☐ Female

Account: Valley Forge Convention and Visitors Bureau

Contact Type: Primary

Title:

Email: test@valleyforge.org Send

Ast. Phone:

Birthdate: --Month-- --Day--

Spouse:

Phone/Fax Numbers

Primary: 610.834.1550 ext.

Alternate: ext.

Cell:

Fax: 610.834.0202 ext. Send

Home:

Address Information

Physical	Billing	Shipping
Use: Account: Physical	Use: Account: Billing	Use: Account: Shipping
Address: 1000 First Ave	Address: 1000 First Ave	Address: 1000 First Avenue
Line 2: Ste 101	Line 2: Ste 101	Line 2: Suite 101
Line 3:	Line 3:	Line 3:
City: King of Prussia	City: King of Prussia	City: King of Prussia
State/Province: PA	State/Province: PA	State/Province: PA
Zip/Postal Code: 19406	Zip/Postal Code: 19406	Zip/Postal Code: 19406
Country: UNITED STATES	Country: UNITED STATES	Country: UNITED STATES

Additional Information

General

Extranet Access: None

Member Records

Meeting Sales Leads

Tourism Sales Lead

Colored fields are required.

Save Save & New Contact Cancel

5. When updating or adding accounts, please select the appropriate “Contact Type” for that individual. (See blowout)
- **Primary** – Owner or General Manager
 - **Secondary** – General Manager or Director of Sales.
 - **Tertiary** – Sales manager or other key employees.
 - **Billing** – Accounts payable contact for membership due invoicing.
 - **Inactive** – Any contact that no longer works for the property / venue.
6. Select the appropriate “**Extranet Access**” for the individual (making changes to member records, responding to Meeting Sales or Tourism Sales Leads, viewing Service Request, etc.)
- Hold down **Ctrl** and right click to select multiple access rights.
7. Make sure to click “**Save**” once you’ve filled out all of the fields.
- Save & New Contact will save the contact information and open up a new blank screen to add an additional contact.

Section II.2 - Listings

Edit a Listing

1. To update your website listing, click the “Edit” / **Pencil Icon** to the left of the appropriate listing under the Listing tab.



2. **Contact:** Main contact of your listing.
3. **Address Type:** Select “Physical” to display the main address of your account.
4. **Listing:** Enter the description for your venue. There is a 400 character limitation.

A screenshot of the 'UPDATE LISTING FOR VALLEY FORGE CONVENTION AND VISITORS BUREAU' form. The form has a 'Save' button and a 'Cancel' button. Below the buttons is a red message: 'Colored fields are required.' The form is divided into sections: 'Listing Information', 'Type: Web', 'Company: Valley Forge Conventi...', 'Category: Support Services', 'SubCategory: Tourism Marketing/Promotion', 'Contact: David Bradley (Primary)', 'Address Type: Account: Physical', and 'Listing: The Valley Forge Convention and Visitors Bureau, Ltd. is a private, non-profit membership sales and marketing organization which aggressively promotes the Valley Forge area and Montgomery County as a convention site and leisure visitor destination by promoting patronage of its member hotels, restaurants, attractions and services. The Bureau represents more than 450 member businesses throughout Southeast Pennsylvania. test'. Red arrows point to the 'Contact' dropdown (2), the 'Address Type' dropdown (3), and the 'Listing' text area (4).

5. **Listing Details:** Information on the left will pull in from your Account Detail (a). By checking on the “Overwrite” box, you may replace it with alternate text to display on www.valleyforge.org (b).

A screenshot of the 'Listing Details' form. The form is divided into two main sections: 'Field Overwrite? Account Value' and 'Overwrite with...'. The 'Field Overwrite? Account Value' section contains fields for Company, Company (sort), Address Line 1, Address Line 2, Address Line 3, City, State, Zip, Country, Email, Web Site, Primary Phone, Alternate Phone, Fax, and Tollfree. The 'Overwrite with...' section contains fields for Company, Address Line 1, Address Line 2, Address Line 3, City, State, Zip, Country, Email, Web Site, Primary Phone, Alternate Phone, Fax, and Tollfree. Red arrows point to the 'Field Overwrite?' checkbox (5a) and the 'Overwrite with...' fields (5b).

6. **Website Notifications:** Enter any email addresses to be notified when the website listing reaches a designated number of hits (number of times it has been viewed).
7. Make sure to click “**Save**” once you’ve filled out all of the fields.

Website Notifications 6

Email to Notify:

(You can add multiple email addresses by separating them by semi-colons)
 (Example: joe@msn.com;fred@aol.com;...)

Interval:
 ☐ Never
 ☐ Every 250 Hits
 ☐ Every 500 Hits
 ☒ Every Hits

Colored fields are required.

8. All updates will be placed in a ****Pending Approval**** status until the updates have been approved by the Valley Forge CVB. The updated listing will display on www.valleyforge.org once it has been approved.

Filter: All Listings
--Any Type--
Page 1 of 1

Action	Listing ID	Type	Category	SubCategory	Listing
<div style="border: 1px solid red; padding: 2px; display: inline-block;">9</div>	15104	Web	Support Services	Tourism Marketing/Promotion	The Valley Forge Convention and Visitors Bureau, Ltd. is a private, non-profit membership sales and marketing organization which aggressively promotes the Valley Forge area and Montgomery County as a

Page 1 of 1

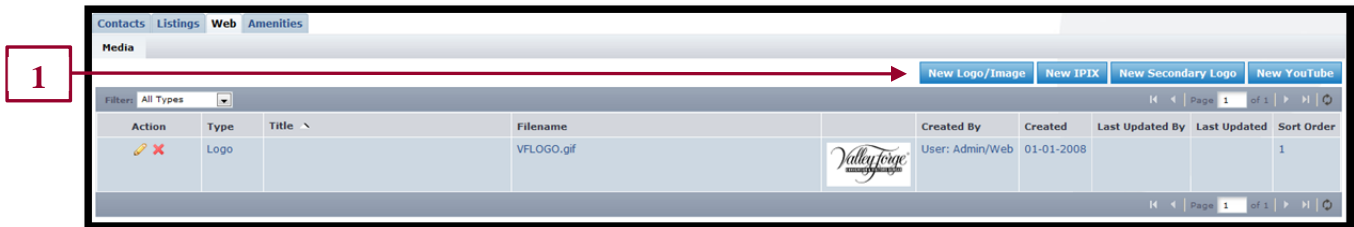
9. Pending changes have been approved when the icon next to the “edit” icon is greyed out. If the icon is still blue and yellow, approval is still pending.

Section II.3 - Web

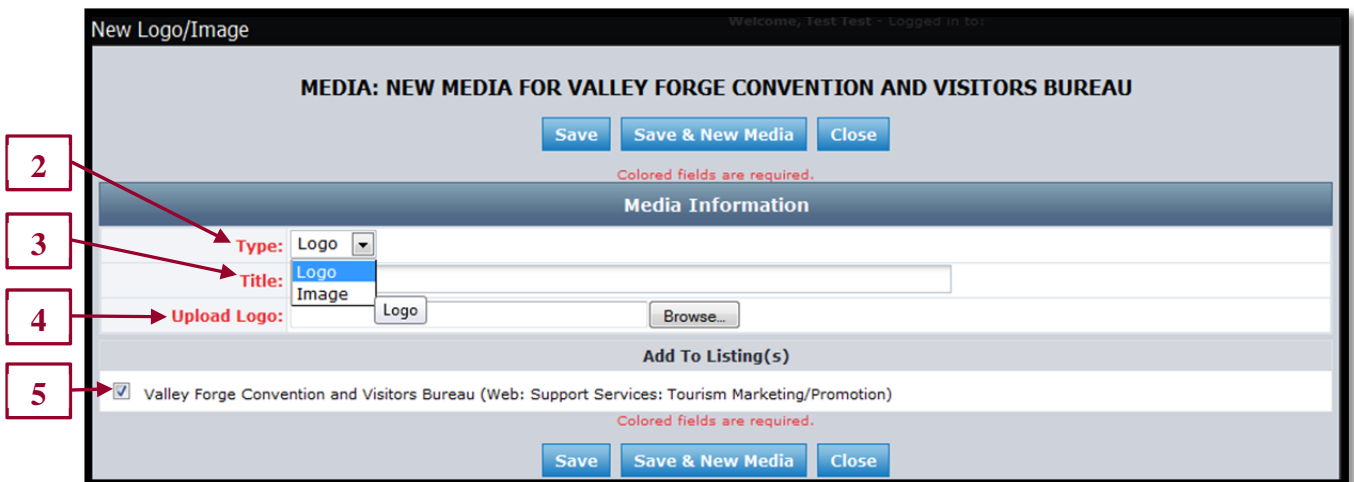
Media – Logos and Pictures

To attach an image to your listing(s), click on the **Web** tab and then the **Media** sub-tab. If you have any images already uploaded, you will see them there. To add new images

1. Click on the “New Logo/Image” button on the right hand side of the screen.

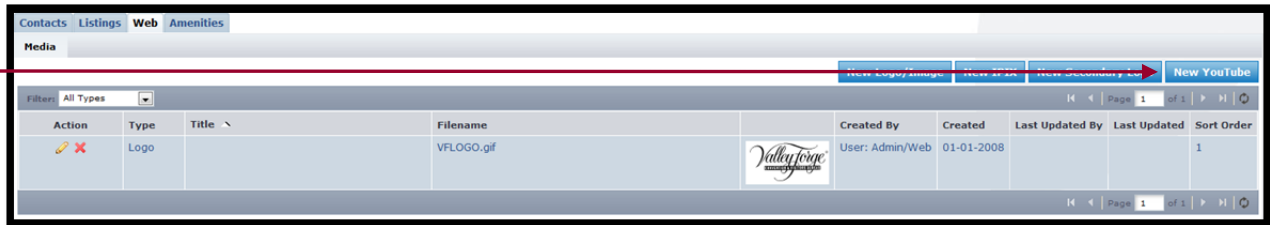


2. For your main image, choose “**Logo**” under Type and for secondary choose “**Image**” for the Type.
3. Enter a Title of the image you are uploading.
4. Browse to find the file on your PC (make sure files are RGB, under 1MB in size and either a jpg or png type).
5. Check the box to the left of the listings that you would like the image to appear on.
6. Click Save to save the to your account.



YouTube Video

1. You can also add a YouTube video to your listing within the Media tab by clicking on the “New YouTube” button.



2. Add a Title for your video
3. Copy the link of your YouTube video and paste it onto the YouTube Link.
4. Check the box for the online listings where you wish to have the video shown.
5. Click “Save” to save the information to your account.

A screenshot of the 'New YouTube' form. The form is titled 'MEDIA: NEW MEDIA FOR VALLEY FORGE CONVENTION AND VISITORS BUREAU'. It has three buttons at the top: 'Save', 'Save & New Media', and 'Close'. Below the buttons, there is a section titled 'Media Information' with a red note 'Colored fields are required.' Below this, there are two input fields: 'Type: YouTube' and 'Title:'. A red box with the number '2' points to the 'Type' field. Below the 'Title' field, there is a 'YouTube Link:' field. A red box with the number '3' points to the 'YouTube Link' field. Below the 'YouTube Link' field, there is a section titled 'Add To Listing(s)' with a red note 'Colored fields are required.' Below this, there is a checkbox labeled 'Valley Forge Convention and Visitors Bureau (Web: Support Services: Tourism Marketing/Promotion)'. A red box with the number '4' points to the checkbox. At the bottom, there are three buttons: 'Save', 'Save & New Media', and 'Close'.

Section II.4 - Amenities

1. Each member can update their amenity information as they see fit. This information can be viewed on the Valley Forge CVB website & may be included in print materials.
2. There are sub-tabs under this section that you can use to promote your property / venue. Select the appropriate sub-tab under Amenities (General or Meeting Facilities).
3. Click “Edit Amenities” to update.
4. Select or Edit the appropriate amenities fields as it relates to your property / venue.

General

General information about your property / venue can be updated in this section.

Meeting Facilities

The Meeting Facilities sub-tab is used to update our facilities’ specification sheets for marketing purpose and to populate our online venue search.



**Member Extranet
Meeting Sales Leads**

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

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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

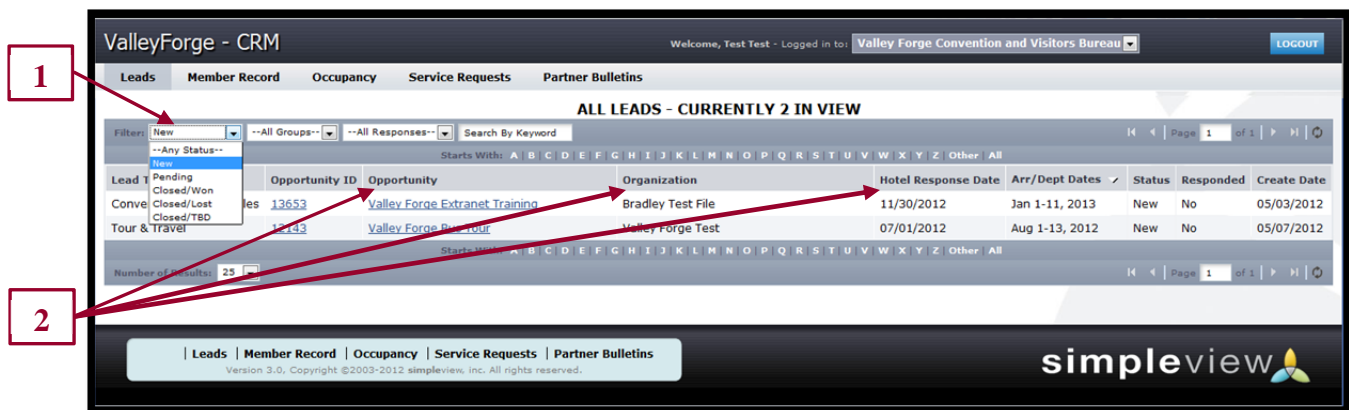
(Lead can be viewed but Response tab no longer appears. Please call the CVB rep to see if a manual response is possible)

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.

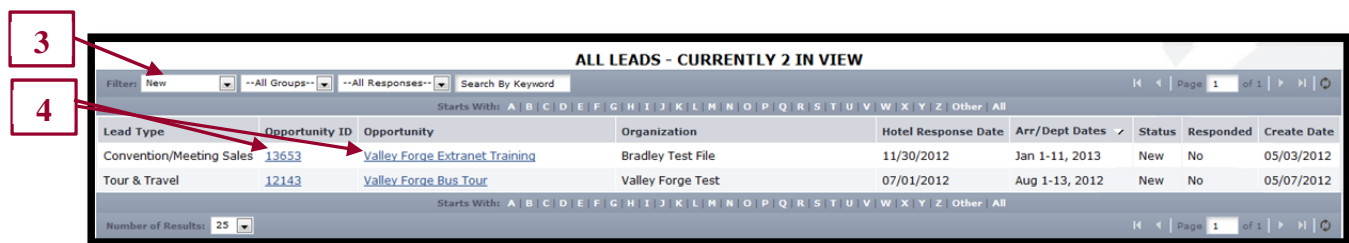
Closed/TBD – Client has selected the area, but a headquarter hotel / venue has not been selected.

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.



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.



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
 EEI Type: Meeting Default EEI
 Decision Making Process:
 Status: New
 Decision Date: 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

Meeting Requirements:
 Schedule of Events:
 Action Requested:
 Comments:
 Competitive Sites:
 Meeting Specs: --None--
 Lost Business Code: --None--
 Lost Comments:

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

Date Information
 Date Comments:

Room Summary

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

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--

- 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.
- Rate Range** – Enter the rate you are offering. The Requested and Peak Night Rooms will auto-populate from information entered into the next section.
- 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.
- 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 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.



**Member Extranet
Tour & Travel Leads**

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

**Valley Forge Convention and Visitors Bureau
1000 First Ave., Suite 101
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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

Filters: 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
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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simpleview

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.

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

Filters: 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
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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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 lam@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	
Date Lead Sent: 05/31/2012	Needs

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". It contains several sections: "Pursuing this lead?" with radio buttons for "Yes" and "No"; "Comments:" with a large text area; "Bureau-Only Comments:" with a smaller text area and a red warning note; "Room Information" with a "Rate Range" field (0 to 0); "Room Breakdown" with input fields for Singles, Kings, Doubles, Suites, and Multiple; and "File Attachments" with a dropdown menu showing "--None--" and buttons for "Add", "View", and "Remove". Four red boxes with numbers 1 through 4 are placed to the left of the form, with arrows pointing to the "Comments:", "Rate Range", "Room Breakdown", and "File Attachments" sections respectively.

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.



**Member Extranet
Service Requests**

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

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1000 First Ave., Suite 101
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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.

ValleyForge - CRM

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

Logout

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

ALL SERVICE REQUESTS - CURRENTLY 2 IN VIEW

Filter: --Any Status-- --All Groups--

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

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

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 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.

ValleyForge - CRM

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

Logout

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

ALL SERVICE REQUESTS - CURRENTLY 1 IN VIEW

Filter: New --All Groups--

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

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

Number of Results: 25

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

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Service Request Detail

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

The screenshot shows a web application interface for "SERVICE REQUEST DETAIL: FOOD SERVICE". It has a top navigation bar with tabs: Leads, Member Record, Occupancy, Service Requests, and Partner Bulletins. The main content is divided into three sections: Request Information, Contact Information, and Responses. Red callout boxes with numbers 1 through 4 point to specific fields: 1 points to the "Lead" field in the Request Information section; 2 points to the "Attendees", "Budget", and "Location" fields; 3 points to the "Description/Notes" field; and 4 points to the "Additional Documentation" field. The Responses section at the bottom has a table with columns: Add/Edit, Start Date- End Date, Responded, Last Updated, and Comments. A "Return" button is located at the bottom center.

SERVICE REQUEST DETAIL: FOOD SERVICE				
Request Information				
Request ID: 432	Account: Weddings and Events 2012	Request Type: Restaurant / Catering		
Lead: --None--	Request Name: Food Service	Request Status: Lead		
Date(s): 06-11-2012 - 06-12-2012	Time(s): 09:00 AM - 05:00 AM	Attendees: 100		
Deadline: 06-11-2012		Budget: \$1,000		
		Location: Expo Center		
Description/Notes: Catering services needed for 100 attendees.				
Additional Documentation: --None--				
Contact Information				
Contact: Kelley Mishler	Address: 1000 First Avenue, Suite 101			
Title: Service Manager	City: King of Prussia			
Company: Weddings and Events 2012	State: PA			
Phone: (610) 834-7976	Zip: 19406			
Fax:	Country: UNITED STATES			
Email: mishler@valleyforge.org				
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:

File Attachments

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.



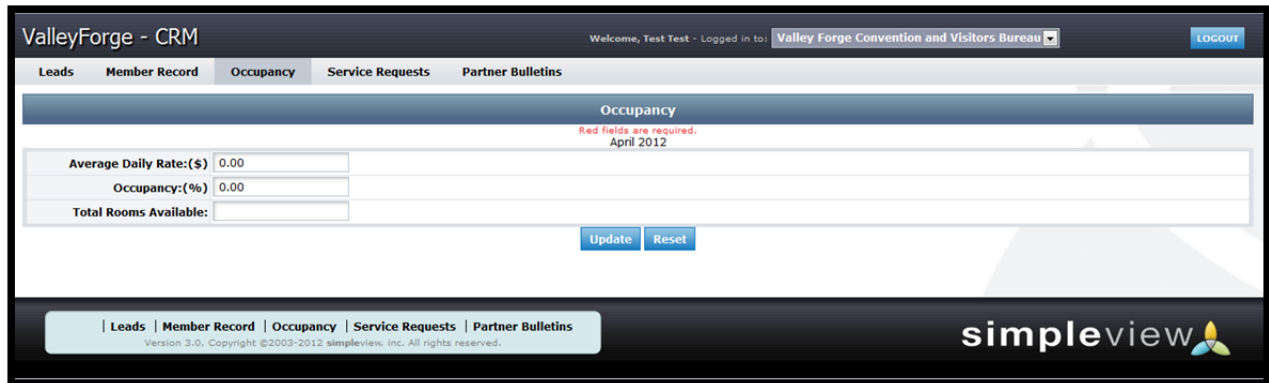
**Member Extranet
Occupancy (Hotel Members)**

<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 VI - Occupancy

This section is a simple way to share your occupancy percentage & average daily rate with the Valley Forge CVB. It is suggested that you fill in this section once a month.



The screenshot shows the 'ValleyForge - CRM' interface. At the top, there's a navigation bar with tabs: Leads, Member Record, Occupancy (selected), Service Requests, and Partner Bulletins. The main content area is titled 'Occupancy' and includes a sub-header 'Red fields are required. April 2012'. Below this, there are three input fields: 'Average Daily Rate:(\$)' with a value of 0.00, 'Occupancy:(%)' with a value of 0.00, and 'Total Rooms Available:' which is empty. There are 'Update' and 'Reset' buttons below the fields. At the bottom, there's a footer with a navigation bar and the 'simpleview' logo.

Occupancy	
Average Daily Rate:(\$)	0.00
Occupancy:(%)	0.00
Total Rooms Available:	

Update Reset

1. Average Daily Rate (ADR) – This should be the average daily rate for the previous month.
2. Occupancy % - This should be the occupancy for the previous month.
3. Total Rooms Available – This should be the physical number of rooms available for the previous month.



**Member Extranet
FAQs**

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

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

FAQs

Access

- Any contact of a Valley Forge CVB member may have access to the Extranet and to the leads.
- Leads are divided into two groups – Tour & Travel and Meeting Sales
 - If members of your sales staff handle very specific markets, a login can be set to one of the two groups (i.e. a person who only handles the Tour & Travel market may want to have Meeting Sales leads hidden from the login). To hide either user group, notify the Membership Staff.

Leads

- Leads are sorted by creation date in descending order, which will put the newest leads at the top.
- Lead Notifications – The Valley Forge CVB Sales Manager will send an email to all members associated with a lead. The email will contain some details of the lead such as type of lead, Lead ID#, and brief description.
 - Email notifications are optional and may be turned on or off based on User Group (Tour & Travel vs. Meeting Sales). For example, a sales manager with the responsibility of checking the leads would receive the notifications, but a Director of Sales may wish to opt out of the notifications. The DOS can still have a login to view the leads at any time, but they just won't be notified every time a new leads hits the member account. Please notify the Membership Staff if you would like to make any changes.

Responding

- Notify the CVB if you have booked the business. – It is very important for the CVB to learn when and where business is booked. This applies to all member types (Hotel, Restaurants, Shopping, etc.)
 - **Response Date has not passed** – enter this information into the **Comments** section. Indicate “Booked Business,” the date(s) booked and the date the information was entered. Please leave all previously entered information in the Comments.
 - **Response Date has passed** – Please call the CVB rep to see if a manual response is possible.
- Entering a response does **NOT** send an email directly to the CVB sales manager; however, responses will be reviewed daily. If you find any information on a lead that has changed once you've talked to the client or have any questions about the information, please contact the CVB sales manager listed on the lead by phone or email.
- If the Sales Manager has made changes to any date(s) in a lead and you have previously entered a response, that response for that date will be invalid and will **NOT** be viewable. This will appear as a new lead, which requires a new response. Any proposal or response for availability may not be the same availability for the new dates; therefore a new response is needed. The CVB Sales Manager will send a “Revised Sales Lead” notification email to inform members of the new lead.

- Information provided by members in the response(s) is confidential. No other members can see your response(s). Only Valley Forge CVB sales staff, or most often the Sales Manager working the lead at the CVB, will see the responses.

Extranet Links:

<http://extranet.vfcvb.simpleviewcrm.com/> or <http://www.valleyforge.org/extranet>

Membership Staff:

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