Extranet Instructions
Responding to and Viewing Leads

https://fortcollinsco.extranet.simpleviewcrm.com/login/#/login

Reviewing Sales Leads:

1. Once you are logged in, click on the "Opportunities" tab in the left hand area of your screen and click "RFPs".
2. Once inside the RFPs section you will see a grid of any leads that have been sent to your property. You can create your own filters to filter out any leads you do not want to see.
   a. Status
      i. **Closed / No Bid Sent:** the response due date is prior to today, and the property did not respond
      ii. **Open:** the lead is tentative, the response due date is either today or in the future, and property has not yet responded
      iii. **Open / Bid Sent:** the lead is tentative, the response due date is today or in the future, and the hotel responded as Pursuing
      iv. **Turned Down:** the property has responded as Not Pursuing
      v. **Closed / Decision Pending:** the lead is tentative, the response due date is in the past, and the property responded as Pursuing
      vi. **Closed / Lost to Another City:** the Lead is Lost in CRM
      vii. **Closed Cancelled:** the Lead is Cancelled in CRM
      viii. **Closed / Won:** the Lead is Definite in CRM, and the property has been selected
      ix. **Closed / Won - Properties TBD:** the Lead is Definite in CRM, the property has not been selected, and the TBD Account is selected
      x. **Closed Lost:** the property was not selected, and the TBD Account is not selected

   b. Groups (Meeting, Tour, or Media)
   c. Whether you have responded or not
   d. Search for leads by Organization or Lead or Lead ID. Once your search term is entered, press tab on the keyboard and the results will be filtered
3. You are able to sort your list of leads by clicking on any of the column headers (i.e. Meeting Name, Organization, etc)

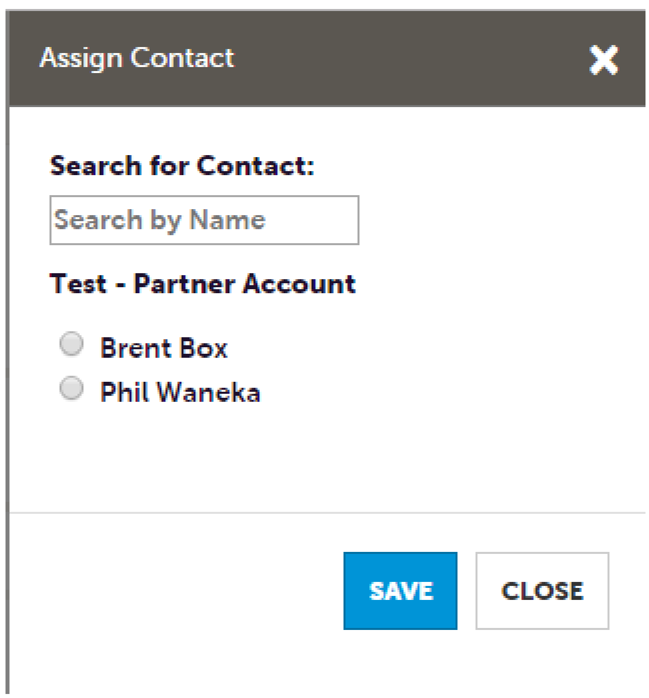
Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	Respo
	31435	3 Day Insiders Edge Meeting	Closed/ No Bid Sent	03/17/2011	Meeting	Real Estate Education Group	Test - Partner Account	04/21/2011	04/28/2011	04/30/2011	No
	31381	Annual Conference - 2015	Closed/ No Bid Sent	03/14/2011	Meeting	Association for Education in Journalism and Mass Communication	Test - Partner Account	10/07/2011	08/12/2015	08/15/2015	No
	27930	2010 Denver Coaching High Performance Sales	Closed/ No Bid Sent	04/05/2010	Meeting	Wells Fargo Bank	Test - Partner Account	05/13/2010	06/07/2010	06/11/2010	No
	27916	May 2011 Bi Monthly Meetings	Closed/ No Bid Sent	04/02/2010	Meeting	Colorado Head Start Association	Test - Partner Account	06/15/2010	05/19/2011	05/20/2011	No
	27915	March 2011 Bi Monthly Meetings	Closed/ No Bid Sent	04/02/2010	Meeting	Colorado Head Start Association	Test - Partner Account	06/15/2010	03/17/2011	03/18/2011	No

Assigning Leads:

If you are a Lead Catcher, you will be responsible for assigning a lead to your Sales Managers. To assign a specific lead, click the eye icon or lead name to get to the detail screen.

1. In the detail screen, scroll to the Responses section.
2. In the responses section you will see a field called Currently Assigned. Click the Assign link located in this field.

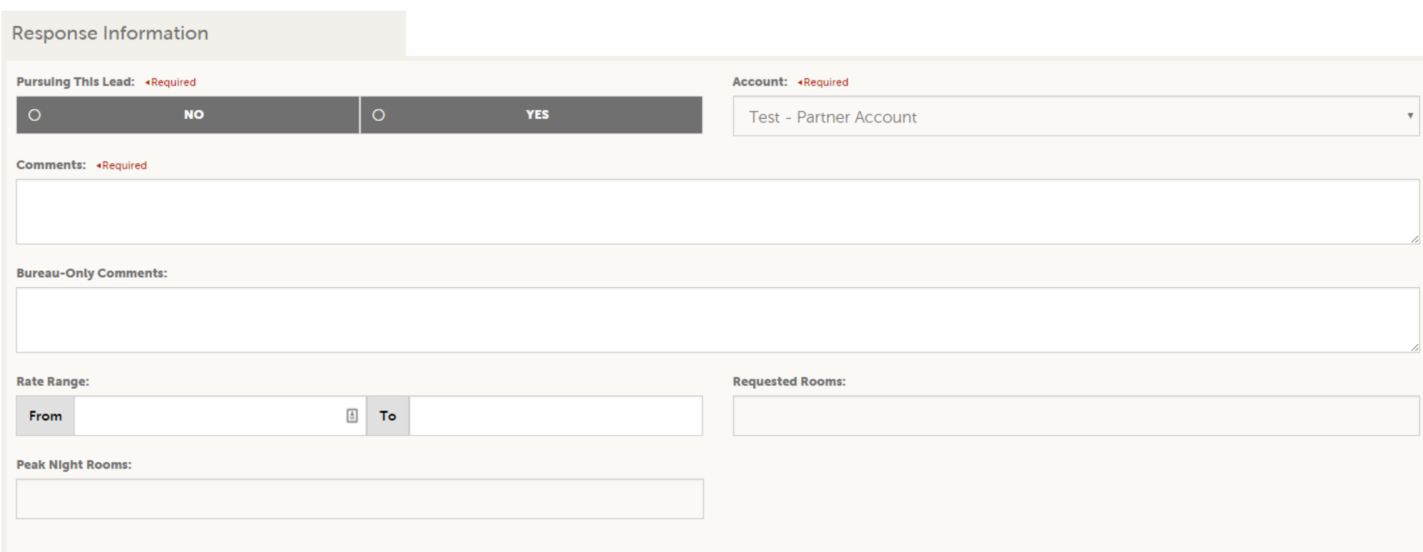
3. A new window will open on the right hand side of the screen, select the Sales Manager that you would like to assign the lead to.
4. Click Save. This will generate an email to the Sales Manager letting them know they have a lead assigned to them.



Viewing & Responding to Leads:

1. Click on the eye icon or lead title to open the lead and scroll down to the responses section.
2. Click the plus sign inside the responses section to create a new response.

3. Please note that the Hotel Response Date listed is your deadline to respond. Once this date has passed, you will no longer be able to respond to the lead online (or edit your response).
4. If a client response is required, click on the client's email address to send your response directly to the client (respond to the CVB online in addition to this response)
5. If the lead has an attached RFP, it will be located in the File Attachments section. Simply click the file name to open/download it.
6. Bureau Only Comments will only be seen by VISIT DENVER (the client will not see them)



7. Fill in any appropriate fields in the response information section.
8. In the room information section enter the number of available rooms by type for each night of the block

Room Information

	Wed 04/19/2017	Thu 04/20/2017	Fri 04/21/2017	Sat 04/22/2017	Sun 04/23/2017	Mon 04/24/2017	Tue 04/25/2017
ROH	0	0	0	0	0	0	0
Singles	0	0	0	0	0	0	0
Doubles	0	0	0	0	0	0	0
Triples	0	0	0	0	0	0	0
Quads	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0
Requested	0	0	0	0	0	0	0

9. Click Save! Once you click Save, an email is generated and sent to the Sales Manager at VISIT DENVER notifying them that you have entered a response.

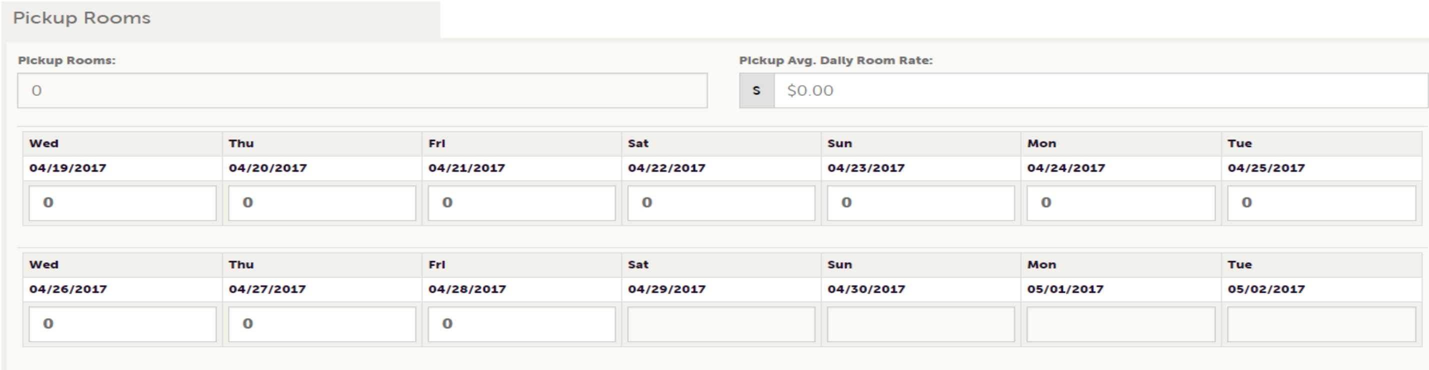
Entering Pickup

1. Once a meeting has been turned into Definite business, you will see a "Room Data" section at the bottom of the screen beneath the responses section.
2. Click the Pickup link.

Room Data

		Update Booked Rooms by Days Out				
Add/Edit	Property	120 Days	90 Days	60 Days	30 Days	Total Pickup
Daysout | Pickup	Test - Partner Account					

3. After the meeting has taken place, you can enter the number of rooms you received from this meeting.

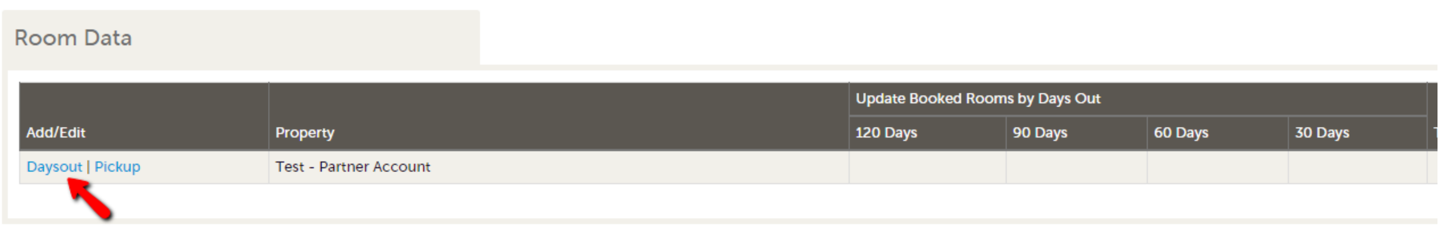


Entering Booked Rooms 30/60/90/120 Days Out

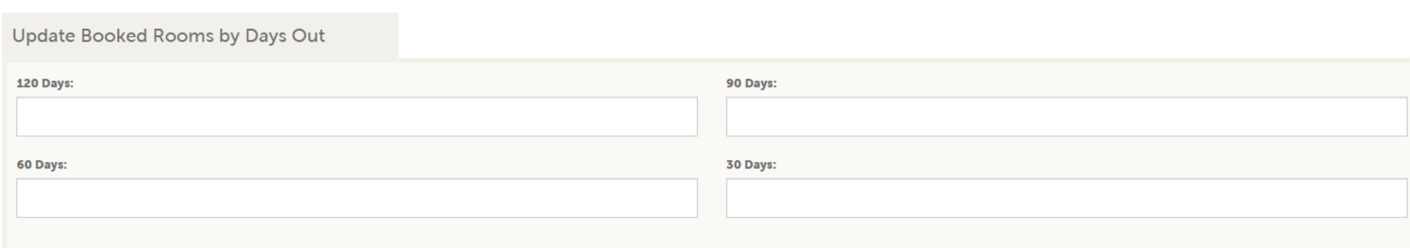
Properties that have been selected for a meeting sales lead can now enter their booked rooms leading up to the event date via the extranet.

Once a Lead has been updated to a "Definite" status the selected hotel properties will have the opportunity to enter the number of booked rooms 30, 60, 90, or 120 days out leading up to an event.

1. Select the lead you want to update by clicking its name or by clicking the eye icon in the actions column.
2. Navigate to the Room Data section on the lead and click the Daysout link to enter the 30, 60, 90 or 120 numbers.



3. Enter number of contracted rooms when the event is 30/60/90/120 days away from the contract start date.



4. Click Save!