

GLCVB Partner Extranet Instructions

Meeting Sales & Sports Leads

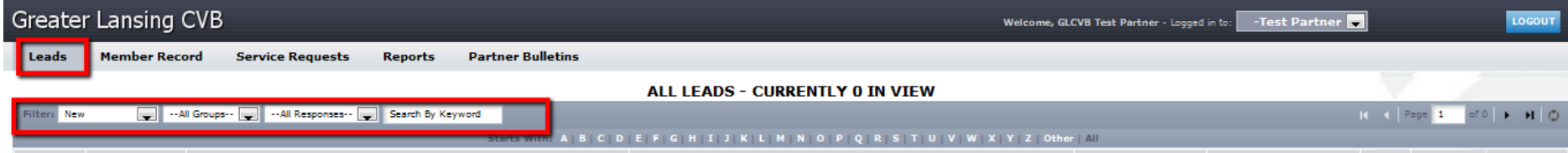
Upon logging in to the Extranet, you will be taken to the Member Record tab of the Extranet.



Click on Leads → On this screen, the default view will show “new” leads.

Note: The term “New” in the extranet means a new lead for your property that needs a response.

You can view any leads for your property by changing the filter options using the dropdowns outlined below or by using the Search By Keyword option:



Filter options are:

<ul style="list-style-type: none"> • All Leads (--Any Status--) • New Leads = need responded to • Pending Leads = pending planner decision • Closed/Won Leads = Closed Lead AND your property was among those selected • Closed/Lost Leads = Closed AND your property wasn't selected • Closed/TBD Leads = Planner has chosen Greater Lansing, but hasn't selected hotels yet 	<ul style="list-style-type: none"> • (--All Groups--) • Meeting Sales • Tour • Sports 	<ul style="list-style-type: none"> • All Responses • No = you have not submitted a response • Yes = you have submitted a response 	<p>Enter any of the following:</p> <ul style="list-style-type: none"> • Lead ID number • Account Name or portion of (example: typing the word “teachers” will display all account names that contain the word “teachers”) • Event Name or portion of (example: the word “Convention” would return every event name that contains the word “convention” in it.)

You are able to sort your list of leads by clicking on any of the column headers

Filter: --Any Status-- --All Groups-- --All Responses-- Search By Keyword Page 1 of 3

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
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Responding to your leads:

→Click on the blue underlined **Opportunity ID** or **Opportunity** to view the lead details. Note the list of leads defaults to Status = New and Responded = No

Leads Member Record Service Requests Reports Partner Bulletins

ALL LEADS - CURRENTLY 1 IN VIEW

Filter: New --All Groups-- --All Responses-- Search By Keyword Page 1 of 1

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
Meeting Sales	11679	CRM TRAINING - SAMPLE LEAD	Test Deb Account	08/25/2011	Jul 16-20, 2012	New	No	08/08/2011

Number of Results: 25 Page 1 of 1

1. Review the lead details: see sample lead below

a. Note: the Print View option at the top will display all the lead details in their expanded form. See last page of these instructions for an example of the print view.

b. To print from the "Print View", select "print this page" at the top center of the web window.

Greater Lansing CVB - Greater Lansing CVB - Login

http://extranet.lansing.simpleviewcrm.com/leads/index.cfm?action=print&oppiD=11679&tblid=5&g

simpleview

[Print this Page](#) [Close Window](#)

LEAD DETAIL: CRM TRAINING - SAMPLE LEAD

Lead Information

Lead ID: 11679	Profile: Test Conference (Conference)
Meeting Name: CRM TRAINING - SAMPLE LEAD	Meeting Planner:
Account: Test Deb Account	Meeting Planner Contact:
Contact: Deborah Tester Bough 500 East Michigan Avenue Suite 180 Lansing, MI 48912 UNITED STATES (517) 377-1426 debemailjunk@gmail.com	
Type: Conference	Source Code: Social Networking Website -

[Print View](#) [Return](#)

OPPORTUNITY DETAIL (NEW): CRM TRAINING - SAMPLE LEAD

Opportunity Information

Opportunity ID: **11679**

Meeting Name: **CRM TRAINING - SAMPLE LEAD**

Account: **Test Deb Account**

Contact: **Deborah Tester Bough**
 500 East Michigan Avenue
 Suite 180
 Lansing, MI 48912
 UNITED STATES
 (517) 377-1426
debemailjunk@gmail.com

Type: **Conference**

EET Type: **State**

Decision Making Process: **Self**

Status: **New**

Decision Date: **09/16/2011**

Hotel Response Due: **08/25/2011**

Repeat Business: **Yes**

Sales Manager: **Deb Bough, CTA**
dbough@lansing.org
 (517) 377-1426

Meeting Requirements: **Group profile - (This section will provide you wit... (Show More)**

Schedule of Events: **7/16/2012 (or alt. dates listed; if preferred are ... (Show More)**

Action Requested: **Response instructions - Please attach proposals in... (Show More)**

Comments:

Competitive Sites: **Grand Rapids and Traverse City**

Meeting Specs: **--None--**

Lost Business Code: **--None--**

Last Comments:

Profile: **Test Conference (Conference)**

Meeting Planner:

Meeting Planner Contact:

Source Code: **Social Networking Website - Facebook**

Market Segment: **Education**

Meeting Pattern: **Not Applicable**

Room Attendees: **20**

Show Attendees: **80**

Site Inspection? **No**

Confidential: **No**

You can respond to and edit your response until this date. After this date, you are no longer able to edit your response and new responses can not be submitted.

Room Attendees = Out of Town attendance
 Show Attendees = Local attendance
 Room Attd + Show Attd = Total Attd

GLCVB contact for the lead

Details of how to respond are noted here.

Any comments related to the dates will be noted here

Date Comments: **Please note the preferred dates are 7/16 - 7/20 ho... (Show More)**

Room Summary

Requested Rooms							Totals and Peak	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Requested Rooms:	Peak Requested:
07/15	07/16	07/17	07/18	07/19	07/20	07/21	12	2
2	2	2	2	2	2	0	Additional room requests/needs:	
100%	100%	100%	100%	100%	100%	0%	The room flow will display the preferred date set	

History/Futures

History/Futures are not available for this lead

Responses

Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	07/16/2012 - 07/20/2012 (Primary)	07/15/2012 - 07/21/2012	No Response Entered			No
Add Your Response	07/22/2012 - 07/27/2012	07/21/2012 - 07/28/2012	No Response Entered			No

Click the hyperlink to add your response

[Print View](#) [Return](#)

2. Fill in the appropriate information (See Sample response below), and click "save" at the bottom
3. Items in red are required fields

a. Detailed screenshot of the response screen

Greater Lansing CVB Welcome, GLCVB Test Partner - Logged in to: -Test Partner [LOGOUT](#)

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

Response Information

Pursuing this lead? Yes No ← If able to bid on this event, select yes
If selecting no, please indicate reason in Comment section

Comments:

Comments noted here are able to be shared with the planner, whereas comments made below are visible only to the CVB staff

Bureau-Only Comments:
These comments will not be seen by the client; they will only be seen by the staff of Greater Lansing CVB.

Note comments directed to CVB here

Rate Range to ← Enter your proposed room rate range here

Requested Rooms ← This number will auto fill after you have filled in room numbers below **Peak Night Rooms**

Room Information

	Sunday 07/15/2012	Monday 07/16/2012	Tuesday 07/17/2012	Wednesday 07/18/2012	Thursday 07/19/2012	Friday 07/20/2012	Saturday 07/21/2012
Any	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Singles	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Doubles	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Suite 1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Suite 2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	0	0	0	0	0	0	0
Requested	2	2	2	2	2	2	0

← Enter the number of rooms you are offering in the "Any" line; or identify number of rooms by type

File Attachments

File Attachments: --None--

[Add](#) [View](#) [Remove](#) ← Click "Add" to locate your saved proposal and attach it to this lead.

[Save](#) [Return to Lead](#)

Upon clicking "Save" you will be prompted if any required fields were left blank. You will be returned to the main lead screen to respond to the alternate date set.

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

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4. **If direct response to the client is requested**, click on the client's e-mail address to send your response directly to the client.
 - a. *By completing your respond as noted above in the extranet and attaching your proposal, the CVB contact will be notified via the extranet that you have/are responding direct to the client. **The CVB will not forward your proposals to the client when "Direct response to client" is noted in the respond details***
5. **If respond to CVB via extranet is requested**, the GLCVB is compiling proposals for the client into a customized bid book. No further action is required by you after submitting your room information and attaching your proposal in the extranet.
 - a. CVB staff will download your proposal from the extranet for inclusion in the customized bid book created for the client.
6. Hotel Response Date – after this date, you will not be able to respond or edit your lead responses online. Please [contact the CVB](#) if changes are required.

Entering Pickup:

1. Once the lead has turned to definite and the event date has passed, you will see a "pickup" section between the Response & History/Futures tabs
2. After the event has taken place, you will enter the number of rooms your property picked up for the event.
 - a. Please note the GLCVB does not request pickup be completed for every group.
 - b. When pick up information is sought, an email will be sent to the contact your property has identified as the "lead catcher" to receive pick up notifications.
3. Please see "how to enter pick up" in the tutorials section of the Partner Bulletins tab for details.

LEAD DETAIL: CRM TRAINING - SAMPLE LEAD

Lead Information

Lead ID: 11679	Profile: Test Conference (Conference)
Meeting Name: CRM TRAINING - SAMPLE LEAD	Meeting Planner:
Account: Test Deb Account	Meeting Planner Contact:
Contact: Deborah Tester Bough 500 East Michigan Avenue Suite 180 Lansing, MI 48912 UNITED STATES +1 (517) 377-1426 debemalk@gmail.com	
Type: Conference	Source Code: Social Networking Website - Facebook
EBI Type: State	Market Segment: Education
Decision Making Process: Self	Meeting Pattern: Not applicable
Status: New	Room Attendees: 20
Decision Date: 09/16/2011	Show Attendees: 50
Hotel Response Due: 08/22/2011	Site Inspector? No
Repeat Business: Yes	Confidential: No
Sales Manager: Deb Bough, CTA dbough@training.org +1 (517) 377-1426	

Meeting Requirements:
 Group profile - (This section will provide you with an overview of the group)
 Event profile - (This section provides an overview of the specific event)
 General requirements - (any needs the group has, example: The group would like to bring own AV.)
 History - (this section includes the most recent years history for the event)
 Requested room rate - (What the group is currently paying and or requested as a range for consideration)
 Special concessions - (Example: The client has a lot of food and beverages that they would like to bring in being that their sponsors donate the items.)

Schedule of Events:
 7/16/2012 (or alt. dates listed) if preferred are not available
 1pm-5pm Registration
 2pm-5pm 2 Workshops
 8pm-10pm Welcome Reception
 10pm-12am Nightcap Networking
 7/17/2012
 7am-8pm Registration
 7:30am-8:45am Welcome Reception for first-time attendees
 8:30am-9am Morning Coffee
 9am-3pm Marketplace Trade Show
 9am-10:15am Educational Workshops
 10:15am-10:30am Break
 10:30am-11:45am Educational Workshops
 11:30am-10:30pm Silent Auction
 12pm-1:30pm General Session Luncheon
 1:45pm-3pm Educational Workshops
 3pm-3:15pm Break
 3pm-6pm Marketplace Trade Show
 5:30pm Dinner on their own
 8pm-12pm Friday Night Shoease
 10pm-12am Nightcap Networking
 7/18/2012
 no morning sessions
 12pm - 1:30pm General Session Luncheon
 1:45pm-3pm Educational Workshops
 3pm-3:15pm Break
 3pm-6pm Marketplace Trade Show
 open evening
 7/19/2012
 7:30am-7pm Registration
 8am-9:30am Morning Coffee
 8:30am-10am Educational Workshops
 10am-10:15am Break
 10:15am-11:45am Educational Workshops
 Noon-1pm Lunch (Sponsored by XYZ company)
 Noon-2:45pm Marketplace Trade show
 Noon-3pm Silent Auction
 2:45pm-6pm Marketplace tradeshow tear down
 3pm-4:30pm Educational Workshops
 3pm-5pm "Family Fun Time Matinee"
 3pm Dinner on your own
 7pm-8pm Silent Auction Reception
 8pm-9pm Silent Auction final bidding
 8pm-10:30pm Shoease Extravaganza
 10:30pm-12am Party On
 7/20/11
 9am-9:30am Morning Coffee
 9:30am-11am Celebration Brunch/Closing Program

Action Requested: Response instructions - Please attach proposals in the Partner Extranet by Friday, August 19, 2011. Please do not forget to include your proposed room rate, number of rooms available and within the contents of your proposal, please indicate acceptance of the special concessions noted.
Comments:
Competitive Sites: Grand Rapids and Traverse City
Meeting Specs:
Lost Business Code:
Lost Comments:

Preferred Date: 7/16/2012 - 7/20/2012	Date Comments: Please note the preferred dates are 7/16 - 7/20 however client will consider the alternate date listed of
Alternate Date: 7/22/2012 - 7/27/2012	
Alternate Date:	

Room Summary							Totals and Peak
Requested Rooms							Requested Rooms: 12
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Peak Requested: 2
07/15/2012	07/16/2012	07/17/2012	07/18/2012	07/19/2012	07/20/2012	07/21/2012	Additional room requests/needs
2	2	2	2	2	2	0	
100%	100%	100%	100%	100%	100%	0%	

History/Futures
 History/Futures are not available for this lead

Responses					
Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
07/16/2012 - 07/20/2012 (Primary)	07/15/2012 - 07/21/2012	Yes	08/17/2011	Definitely bidding	No
07/22/2012 - 07/27/2012	07/21/2012 - 07/28/2012	Yes	08/17/2011	Alternate dates also available- thanks	No

Example of "Print View" to view all details fully expanded and print the lead information if needed.