



# Industry Partner *Extranet 4.0* Instructions

## *Sales Leads*

<https://asheville.extranet.simpleviewcrm.com/login>

Explore Asheville  
27 College Place  
Asheville, NC 28801

[www.AshevilleCVB.com](http://www.AshevilleCVB.com)  
[www.ExploreAsheville.com](http://www.ExploreAsheville.com)

For help or questions, please contact:

**For help with Listings, Event Calendar,  
Packages, etc.:**

**Public Affairs Team**  
Partner Support  
PartnerSupport@ExploreAsheville.com  
828-258-6109

**For help with Extranet Login & Sales  
Lead Questions:**

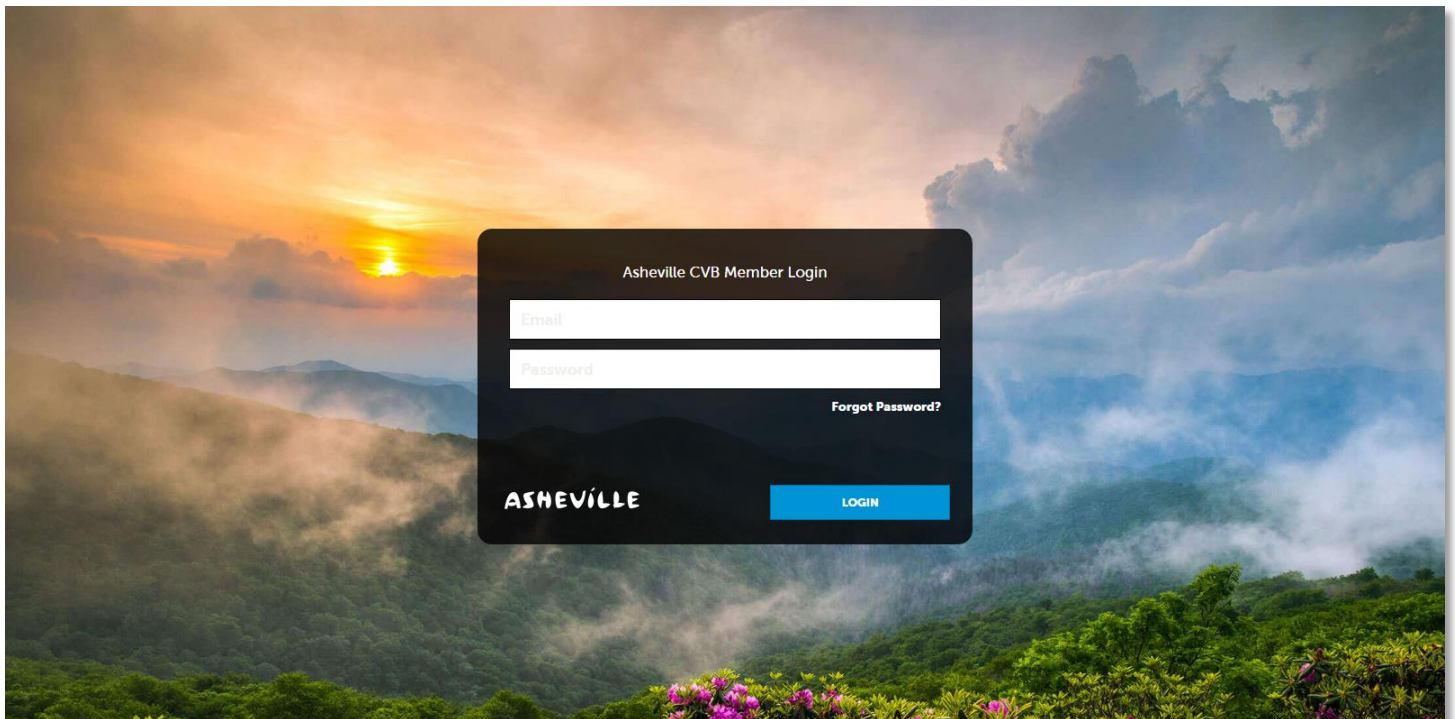
**Carli Adams**  
Group Communications &  
Services Manager  
cadams@ExploreAsheville.com  
828-258-6106

- Section 1: Logging In
- Section 2: Responding to Sales and Group Tour Leads

## Section 1: Logging In

### Logging In:

1. You will be sent an email from Explore Asheville with the log-in link and a temporary password.
2. Click on the link (<https://asheville.extranet.simpleviewcrm.com/login>), which will take you to an *Asheville CVB Member Login* screen.
3. Your username is your full e-mail address.
4. Your password is a temporary password that was e-mailed to you.
5. Upon logging in with your temporary password, **you will be prompted to change your password to one of your preference.**
6. If you ever have problems getting into your account, contact Explore Asheville. We can look up your password or reset it and have a new one generated to you.



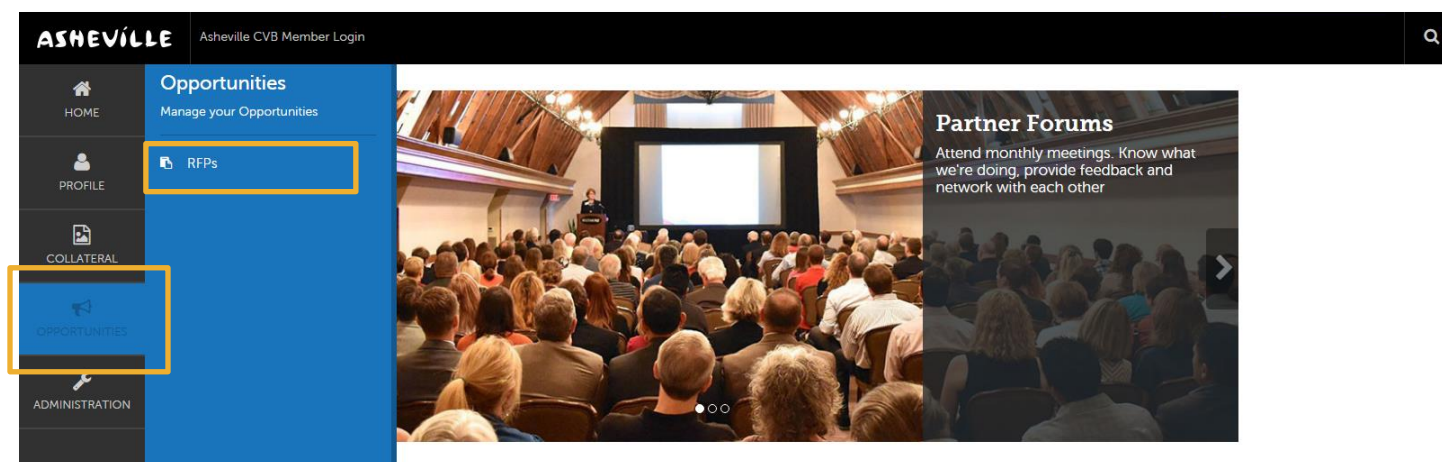
## Section 2: Responding to Sales and Group Tour Leads

There are two types of contacts that can respond and view EA CVB sales leads:

- a. **Sales Lead Catcher** – receives sales lead notifications from EA and can view/respond/assign ALL sales leads. Typically, this is a Director of Sales, General Manager or an Administrative Assistant. More than one person at a property can be the Sales Lead Catcher if necessary.
- b. **Sales Contact** – assigned sales leads from the Sales Lead Catcher and can view/respond to *only* those leads assigned to them. Typically, this is a Sales Manager at a property.

### Receiving and Viewing List of Leads:

1. You will receive a notification email indicating there is a new sales lead to review on the Extranet. There will also be emails for Definite, Lost and Cancelled leads.
2. Login at <https://asheville.extranet.simpleviewcrm.com/login> and use your email as your username and the password you have chosen. Need help? Contact Explore Asheville.
  - a. Once you are logged in, click on the *Opportunities* tab on the left menu.
  - b. Then click *RFPs*.



3. Please note: If you have additional permissions, you will be able to view and edit your organization's listing information, coupons & packages, and submit events under the *Collateral* tab on the left menu. If you do not see these sections under *Collateral* and you are the one responsible for listing updates, please contact Explore Asheville.

ASHEVILLE Asheville CVB Member Login

HOME  
PROFILE  
COLLATERAL  
OPPORTUNITIES  
REPORTS  
ADMINISTRATION

## RFPs

Filters (1)

Responded is:  Response Date:

Lead Name contains:  Create Date:

Lead ID contains:  Organization contains:

Group Type is one of:  Property Lead Status is one of:

APPLY FILTERS CLEAR FILTERS

Manage Filters

Manage Filters

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)
	35925	Test Lead for Extranet 4.0 Training	Open	11/01/2016	Meeting	Board Meeting	simpleview Training Account	Derek's Magnificent B&B	11/30/2016	02/01/2017	02/09/2017

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4. Leads in which you can still respond, or edit are automatically displayed by default. (These have a status of Open or Open/Bid Sent – see *definitions below*).
5. Filters: You can filter your leads in many ways. The image above shows the default setting for filters and columns. Changing which filters and columns display is *highly* customizable by clicking *\*Manage Filters* in the top right corner and selecting either *Columns* or *Filters*.
  - a. Once you have changed these settings to those which are most helpful for you, click *Apply Changes*. These changes will remain in place the next time you log in.
  - b. If you ever want to revert to the default settings, click *Reset* then choose *Filters Only* or *Columns Only* or *Reset All*.
6. Property Lead Status Definitions:
 

**Closed / No Bid Sent:** the response due date is prior to today, and the property did not respond

**Open:** the lead is tentative, the response due date is either today or in the future, and property has not yet responded

**Open / Bid Sent:** the lead is tentative, the response due date is today or in the future, and the hotel responded as Pursuing

**Turned Down:** the property has responded as Not Pursuing

**Closed / Decision Pending:** the lead is tentative, the response due date is in the past, and the property responded as Pursuing

**Closed / Lost to Another City:** the Lead is Lost in CRM

**Closed Cancelled:** the Lead is Cancelled in CRM


**Closed / Won:** the Lead is Definite in CRM, and the property has been selected

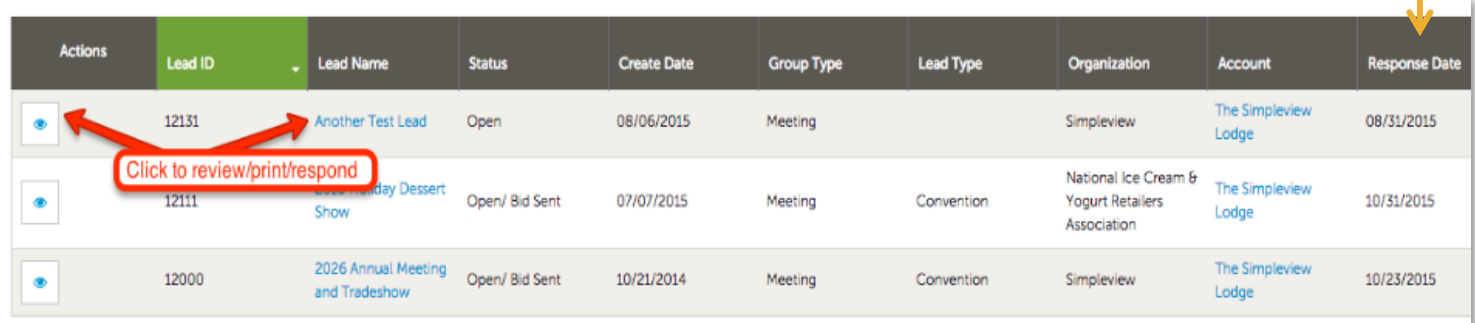
**Closed / Won - Properties TBD:** the Lead is Definite in CRM, the property has not been selected, and the TBD Account is selected




**Closed Lost:** the property was not selected, and the TBD Account is not selected

**Assist:** Accounts booked at your hotel that EA assisted in securing.

## Reviewing a Lead:

1. Click on “” under Actions or the **Lead Name** to open it and respond. Please note that the **Response Date** listed is your **deadline** to respond to the lead online (or edit your response).



Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date
	12131	Another Test Lead	Open	08/06/2015	Meeting		Simpleview	The Simpleview Lodge	08/31/2015
	12111	2026 Holiday Dessert Show	Open/ Bid Sent	07/07/2015	Meeting	Convention	National Ice Cream & Yogurt Retailers Association	The Simpleview Lodge	10/31/2015
	12000	2026 Annual Meeting and Tradeshow	Open/ Bid Sent	10/21/2014	Meeting	Convention	Simpleview	The Simpleview Lodge	10/23/2015

2. All of the lead Information including Meeting Dates, Rooms Summary, Responses, History/Futures, Room Data, and General will be displayed.
3. If the lead has an attached RFP, it will be located in a field titled *Meeting Specs*. Simply click the file name to open/download it.

## Responding to a Lead:

1. If the meeting planner requests that all responses come through Explore Asheville, there will be no contact information for the planner. You are required to respond in the Extranet and an Explore Asheville Sales Manager will compile responses and send to the meeting planner as a bundled response.
2. If there is meeting planner contact information, *you are still required to respond in the Extranet in addition to the meeting planner directly through your email.*

The screenshot shows the Asheville CVB Member Login page. The left sidebar contains navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and REPORTS. The main content area is titled "Lead Details" and includes a "PRINT" button and a "RETURN" button. Below these are sections for "Lead Information", "Meeting Dates", "Room Summary", "Responses" (highlighted with a red box), "History/Futures", "Room Data", and "General". The "Lead Information" section displays the following details:

Lead ID	35925
Meeting Name	Test Lead for Extranet 4.0 Training
Account	Derek's Magnificent B&B
Profile	test mtg
Organization	simpleview Training Account
Organization Address	7458 N. Cholla Boulevard Suite 100 Tucson AZ 85741

3. Scroll down to *Responses* or click on *Responses* on the left menu bar.
4. In the *Responses* section, click on the "+" icon under Actions.

The screenshot shows the "Responses" section for "Derek's Magnificent B&B". It displays the status "Open" and "Currently Assigned" to "Brit Martin (Reassign)". Below this is a "PRINT RESPONSE LOG" button. A table follows with the following columns: Actions, Meeting Dates, Room Request Dates, Pursuing?, and Comments. The first row of data shows meeting dates from 02/01/2017 to 02/09/2017 and room request dates from 02/01/2017 to 02/08/2017. A red arrow points to a "+" icon in the "Actions" column of the first row.

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	02/01/2017 - 02/09/2017	02/01/2017 - 02/08/2017		

5. If you are the “Sales Lead Catcher” you can assign another sales manager to log in and respond to the lead. Click the *Reassign* link, choose appropriate sales manager, and click *Save*. Make sure to let the Sales Manager know that they have a new lead as the extranet does not send any notifications.

**Responses**

Derek's Magnificent B&B

Status Open

Currently Assigned Brit Martin **Reassign**

**PRINT RESPONSE LOG**

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	02/01/2017 - 02/09/2017	02/01/2017 - 02/08/2017		

**Assign Contact**

Search for Contact:

Search by Name

Derek's Magnificent B&B

- ☐ Lauren Harris
- ☒ Brit Martin
- ☐ Derek Mislser

**SAVE UNASSIGN CLOSE**

6. Your information and proposal will be sent to Explore Asheville. **Note that some fields are required.** Bureau Only Comments will only be seen by the Explore Asheville Sales Manager.
7. Once you have entered your response, click *Save* at the top left-hand corner. You can edit and change your response as many times as needed until the Hotel Response Due Date has passed.
8. Note: The EA Sales Manager will send email notifications if there are any updates about the group and once the lead is Definite, Lost, Cancelled, etc. The assigned sales manager on the sales lead for your organization will receive these emails, not the Sales Lead Catcher.



## Lead Response Detail:

SAVE

CANCEL

Sections:

Lead Information

Response Information

Room Information

File Attachments

For Sports Groups Only

General

Lead Information

Lead ID37411

Meeting NameTest Lead for Training

OrganizationAsheville Convention and Visitors Bureau

ContactSwims Test

36 Montford Avenue

Asheville NC 28901

UNITED STATES

(828) 258-6110

3rd Party Meeting Planner

Meeting Planner Contact

Additional room requests/needs

Response Information

Pursuing This Lead: Required

NO

YES

Account: Required

Derek's Magnificent B&B

Comments: Required

Bureau-Only Comments:

Rate Range:

FromTo

Requested Rooms:

0

Peak Night Rooms:

0

Room Information

	Sat 09/01/2018	Sun 09/02/2018	Mon 09/03/2018	Tue 09/04/2018	Wed 09/05/2018	Thu 09/06/2018	Fri 09/07/2018
Any	0	0	0	0			
Total	0	0	0	0			
Requested	0	0	0	0			

File Attachments

Please attach all documents as PDF only.

ATTACH FILE or drag files to the page

No files have been attached

For Sports Groups Only

Group Rate Code:

Are Rooms Blocked?:

YES

NO

Reservations Phone:

Reservation Cut Off Date:

Is Breakfast Included?:

YES

NO

Extra Person Charge:

\$

Website:

Hotel Contact Email:

General

Electronic Proposal:

Booking Link:

### Lead Information:

Meeting Name, Planner or  
3<sup>rd</sup> Party Planner Contact  
Info

### Response Information:

Pursuing the Lead?  
(Required)  
Account & Comments  
(Required)  
Offered Rates

### Room Information:

Rooms Offered

### File Attachments:

Attach  
Proposal

### For Sports Groups Only:

Information Needed for  
Sports Groups

### General:

Include Web Link  
Proposal (if applicable)