



Industry Partner *Extranet 4.0* Instructions

Sales Leads

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

Explore Asheville
27 College Place
Asheville, NC 28801

www.AshevilleCVB.com
www.ExploreAsheville.com

For help or questions, please contact:

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

Joseph Phelps
Public Affairs Specialist
jphelps@ExploreAsheville.com
828-258-6113

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

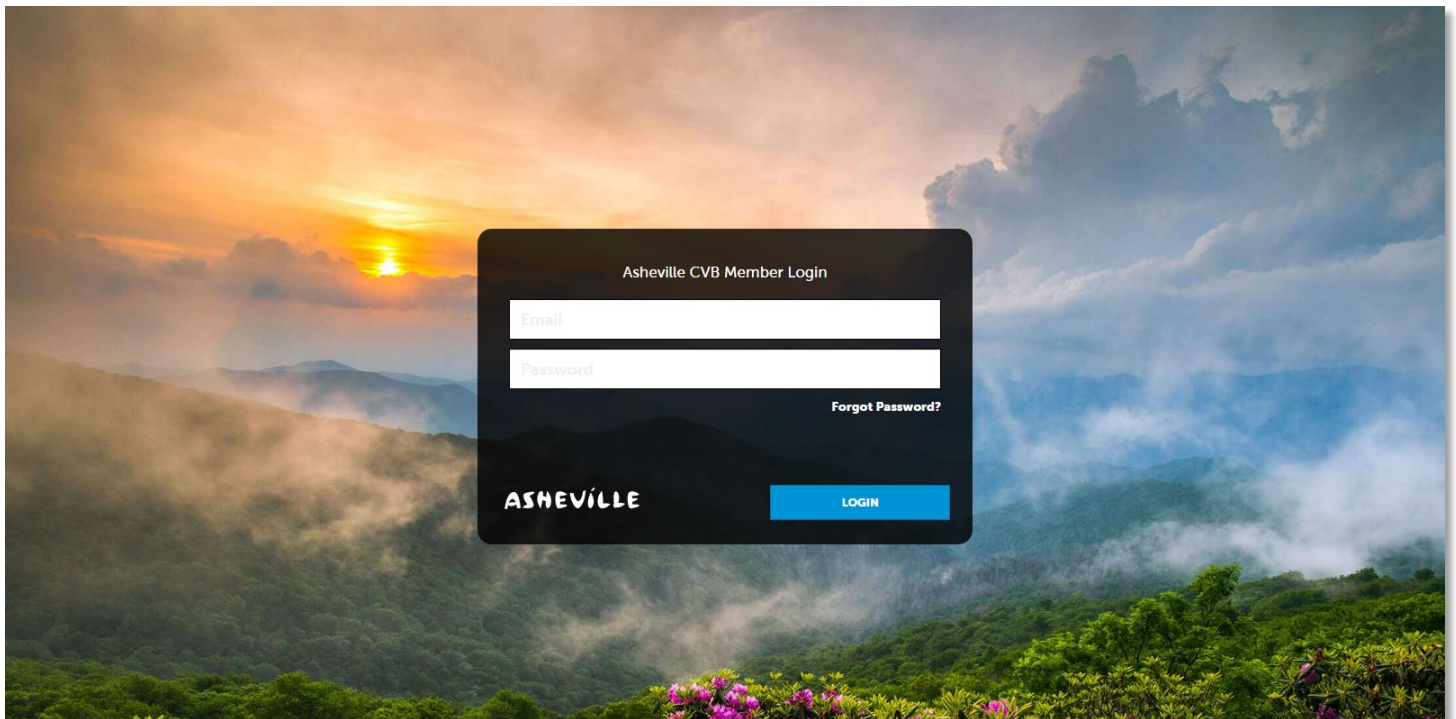
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- Section 1: Logging In
- Section 2: Responding to Sales and Group Tour Leads

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 (<http://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.



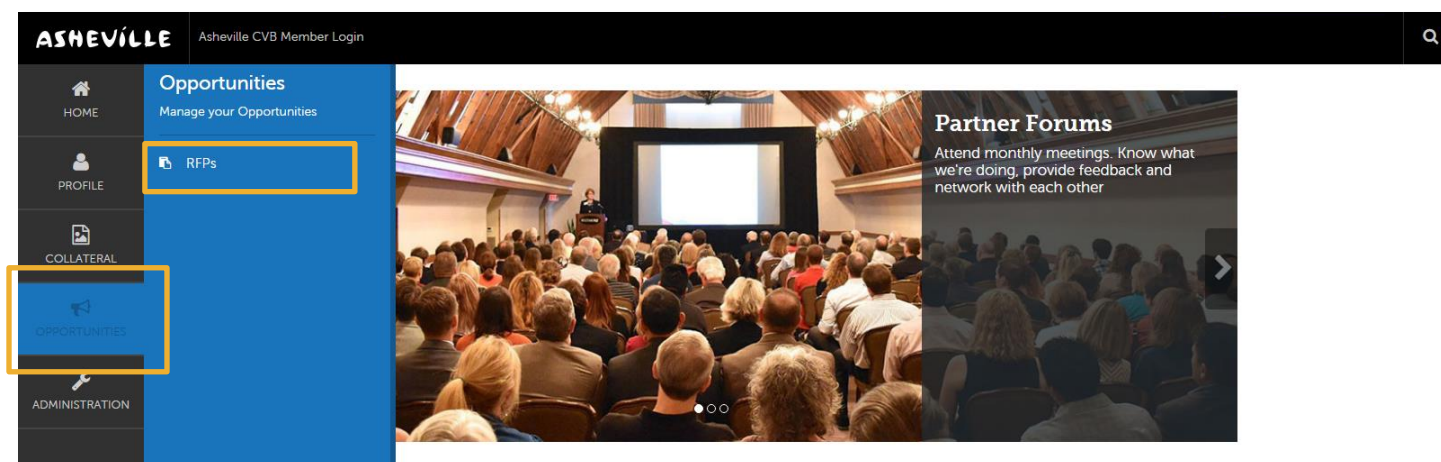
Section 2: Responding to Sales and Group Tour Leads

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 <http://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

RFPs

Filters (1)

Responded is: [Dropdown] Response Date: [-All Dates-]

Lead Name contains: [Text Box] Create Date: [-All Dates-]

Lead ID contains: [Text Box] Organization contains: [Text Box]

Group Type is one of: [CHOOSE] Property Lead Status is one of: [OPEN, OPEN/ BID SENT]

[APPLY FILTERS] [CLEAR 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)
[Eye Icon]	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

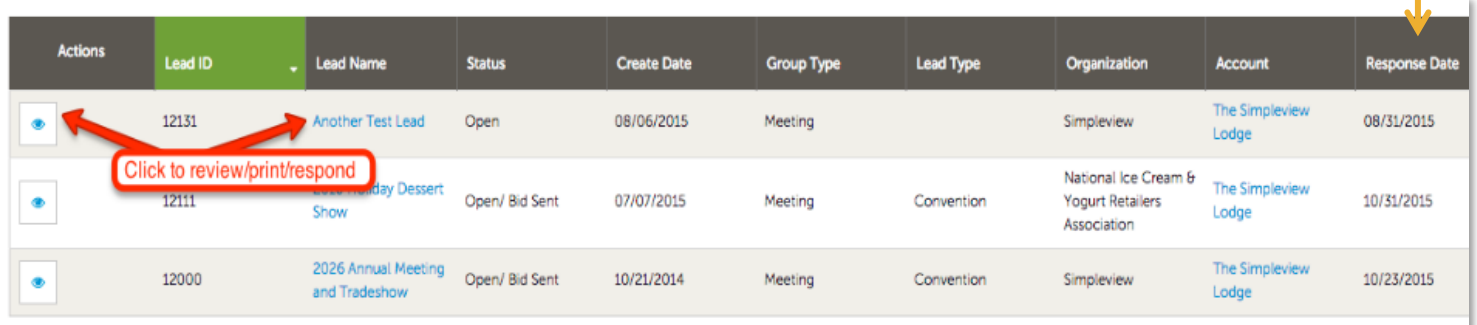
Closed / Won - Properties TBD: the Lead is Definite in CRM, the property has not been selected, and the TBD Account is selected




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	2015 Monday 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 interface. The top navigation bar includes the Asheville logo and the text "Asheville CVB Member Login". A left sidebar contains navigation options: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and REPORTS. The main content area is titled "Lead Details" and features a "PRINT" button and a "RETURN" button. Below these buttons is a "Sections:" menu with options: Lead Information, Meeting Dates, Room Summary, Responses (highlighted with a red box), History/Futures, Room Data, and General. To the right of the sections menu is a "Lead Information" section with 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 of the Asheville CVB Member Login interface. The section is titled "Responses" and displays details for a lead named "Derek's Magnificent B&B". The status is "Open" and the lead is currently assigned to "Brit Martin (Reassign)". There is a "PRINT RESPONSE LOG" button. Below this is a table with the following columns: Actions, Meeting Dates, Room Request Dates, Pursuing?, and Comments. The first row of the table shows a "+" icon in the Actions column, which is circled in red and pointed to by a red arrow. The Meeting Dates are "02/01/2017 - 02/09/2017" and the Room Request Dates are "02/01/2017 - 02/08/2017".

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:

New Response

SAVE
CANCEL

- Sections:
- Lead Information
 - Response Information
 - Room Information
 - File Attachments
 - For Sports Groups Only
 - General

Lead Information

Lead ID: 37411

Meeting Name: Test Lead for Training

Organization: Asheville Convention and Visitors Bureau

Contact: Swims Test
36 Montford Avenue
Asheville NC 28801
UNITED STATES
(828) 258-6110

3rd Party Meeting Planner
Meeting Planner Contact
Additional room requests/needs

Response Information

Pursuing This Lead: NO YES

Account:

Comments:

Bureau-Only Comments:

Rate Range: From To

Requested Rooms:

Peak Night Rooms:

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:

Reservations Phone:

Is Breakfast Included?: YES NO

Website:

Are Rooms Blocked?: YES NO

Reservation Cut Off Date:

Extra Person Charge: \$

Hotel Contact Email:

General

Electronic Proposal:

Booking Link:

Lead Information:
Meeting Name, Planner or 3rd 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)