Member Extranet
Tour & Travel Leads

http://www.valleyforge.org/extranet

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.

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

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.

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.