



CRM User Manual for CVB Membership

General Overview

Who is the CRM System Administrator?

Kristen May, Executive Assistant

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How do I access the CRM?

Go to or click on this link: <http://extranet.padutch.simpleviewcrm.com/login/index.cfm>

What is the CRM?

It is a tool used to communicate the needs of clients with our member properties who can service their needs for an upcoming tour, meeting, reunion, sports event or convention. The leads are for groups of at least 10 people, and any member is eligible to receive leads, as long as they can accommodate 10 or more people at one time.

Where do the leads come from?

Sales calls, prospecting, trade show meetings, referrals, client phone/email inquiries... many ways the CVB Sales Team has contact with clients every day.

How many leads will my property receive?

This number will vary for every member. The CRM leads are customer-centric, meaning the CVB Sales Team tries to match the needs of the client with members who can serve those needs – on as broad a basis as possible.

Why don't the leads "go away" after the arrival date?

Currently, there is no effective way to filter the leads to show only current leads. Use the sort and filter functions to limit and organize the leads you are viewing.

Who can have access to the CRM?

Any contact at a member may have access to the CRM leads.

How are leads categorized?

Leads are divided into two user groups: Tour & Travel *and* Meeting Sales (Meeting Sales includes reunions and sports markets)

User Name and Password

If you are logging-in for the first time or if your password has been reset, you will receive an email similar to the one below from the System Administrator. Your username will always be the email address used for PA Dutch CVB communications. A temporary password will be assigned, but you will be able to update the password when you log-in.

Dear Susan,

Your password to the CRM Sales Leads from the PA Dutch CVB has been reset by: skimball@padutchcountry.com

Here is your new login information:


Username: skimball@padutchcountry.com
Password: 8sdnxi

The next time you logon you will be prompted to change your password.

To login into PA Dutch CVB Member Access area, please click on the link below:
<http://extranet.padutch.simpleviewcrm.com/>

If you can't remember your password, click the **"Forgot Password?"** link and enter your email address. You will receive an email with your password.

PA Dutch CVB Extranet Login



Username:

Password:

Remember Username:

[Forgot Password?](#)

Logging-In

When you log-in, the system will default to filter out all leads except for those in “new” status. The list will also sort by “**Created Date**” in descending order (putting the newest created leads at the top).

You are able to sort your leads by clicking on any of the column headers. Clicking once will sort in ascending order. Click the same header again will sort in descending order. You can also search the lead name by “**Starts With**” alpha or use Ctrl F to do a Find/Search.

PA Dutch CVB
Welcome, Susan Kimball - Logged in to: PA Dutch House Account/Passkey [LOGOUT]

Leads

ALL LEADS - CURRENTLY 9 IN VIEW

Filter: New --All Groups-- --All Responses-- Search By Keyword

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	Lead ID	Lead	Organization	Hotel Response Date	Arr/Dept Dates	Status	Responded	Create Date
Tour/Travel	23375	Online rates needed	Groupize	05-31-2011	Jul 1-2, 2011	New	No	03-10-2011
Tour/Travel	23371	September 2011 Senior Group	AAA Vacations	03-31-2011	Sep 13-15, 2011	New	No	03-08-2011
Tour/Travel	23364	Test lead-do not delete	Test Tour Group	09-15-2011	Dec 14-17, 2011	New	No	03-03-2011
Meeting Sales	20688	Test Family Reunion Lead	Test Reunion Account	12-01-2011	Aug 5-6, 2012	New	No	03-03-2011
Tour/Travel	23363	May 2011 Tour	Travel Tours Unlimited	03-16-2011	May 16-19, 2011	New	No	03-03-2011
Tour/Travel	23101	Senior Tour 2011	Buckeye Charters Tour & Travel Ltd.	09-01-2011	Oct 20-21, 2011	New	No	12-02-2010
Meeting Sales	20564	Test Family Reunion Lead	Test Reunion Account	12-01-2011	Aug 5-6, 2012	New	No	08-24-2010
Tour/Travel	22046	Test lead-do not delete	Test Tour Group	09-15-2011	Dec 14-17, 2011	New	Yes	08-06-2009
Meeting Sales	20068	Test Meeting-do not delete	Test Meeting Company Account	12-30-2011	Dec 30-31, 2013	New	No	10-21-2008

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

Number of Results: 25

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Leads
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Lead Status Definitions:

- **New** - new lead which the response date has not passed.
- **Pending** – the member “Respond By” date has passed
- **Closed/Won** – your property won the business
- **Closed/Lost** – lead is definite but you are not the selected property, or the business is lost or cancelled.
- **Closed/TBD** – group has selected Lancaster, but the final list of hotels has not been selected (most likely this will be overflow situations)

There may be instances where your property is added to a lead a few weeks or months after it is initially created, based on the changing needs of the client. In this case, the status may be “**Pending**” and it may not appear in the top 10-12 leads listed. The notification email should provide you with enough information to find the lead. Using the filters will be helpful in these cases.

Tour & Travel - Responding to a Lead

Information recorded by you in this area is confidential. No other member can see your response. However, the Sales Staff at the PA Dutch CVB will see your response (most often only the Sales Manager working the lead).

Responses					
Add/Edit	Arrival - Departure	Responded	Last Updated	Comments	Attachments
Add Your Response	08/24/2010 - 08/25/2010	No Response Entered			--Attachments--

[Return](#)

To respond to the lead, click “**Add Your Response**”. Please add a response even if you are not pursuing the business.

Choose “**yes**” or “**no**” then leave a follow-up comment. If you are not pursuing the lead, indicate the reason in the “**Comments**” section (e.g. no availability, two night minimum, etc.). Even if you don’t have availability, feel free to contact the client to introduce your property and/or offer alternative date(s). Use the opportunity to learn if the dates are now flexible or to educate the client on your property for possible future business.

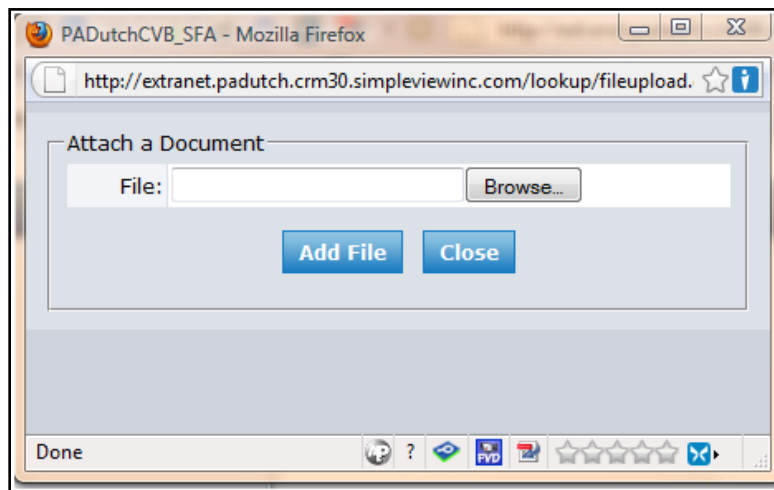
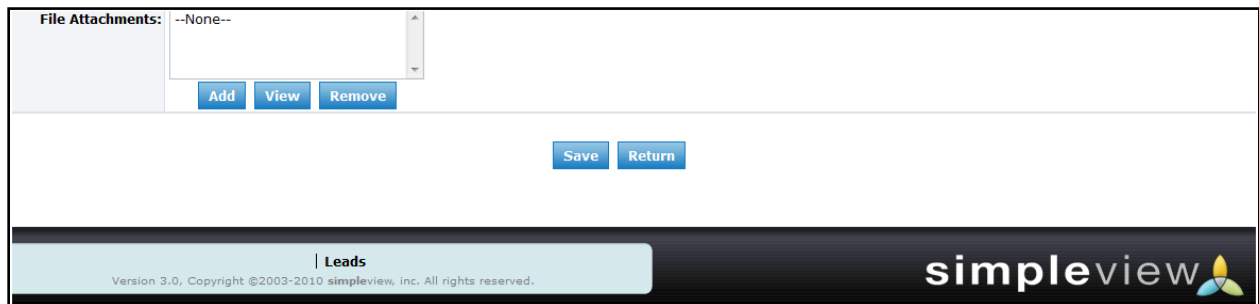
Response Information	
Pursuing this lead?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Comments:	<div style="border: 1px solid #ccc; height: 80px;"></div>
Room Information	
Rate Range	0 to 0

Lodging properties should indicate the “**Rate Range**” you will offer the client.

Under “**Room Breakdown**,” enter the appropriate room info you are offering client. If actual room type breakdown is not finalized, use the “**Any Type**” block.

Room Information			
Rate Range	0	to	0
Room Breakdown			
Any Type	0	Singles	0
		Doubles	0
		Suites	0
File Attachments			
File Attachments:	--None--		
	Add	View	Remove
	Save	Return	

If you wish to attach a file to your response, be sure have your document saved somewhere on your computer. Under **“File Attachments”**, click **“Add”**. Another window will appear; click **“Browse,”** find your document, click **“Add File”** and then **“Close”** to save.



Click **“Save”** to save the information you have entered and attached. Click **“Return”** to get back to the lead detail.

Once your response is entered, you can view your comments and the date last updated. You also have the option to **“Edit”** or **“View”** your response in detail.

You will only be able to add or edit your comments until the **“Response Date”**. After this time, you can view your response, but you will not be able to edit or add a new response.

Responses					
Add/Edit	Arrival - Departure	Responded	Last Updated	Comments	Attachments
Edit Your Response View Your Response	11/23/2010 - 11/24/2010	Yes	06/26/2010	Emailed rate of \$109+tax, includes breakfast.	--Attachments--

[Return](#)

Please notify the CVB if you book the business! It is very important for the CVB to learn when and where business is booked. This applies not only to lodging properties, but to any member type.

- If the response date has not passed, you can enter information in the **“Comments Box”**.
- If the response date has passed, e-mail the CVB Sales Manager directly with your booked business info.

- If you confirm a booking or rooms, please indicate booked business, the date(s) booked by the client, the date you are entering this response information and your initials. Please retain any information previously entered in the response area.

Response Information	
Pursuing this lead?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Comments:	Responded with admission info and rates. 2/12/10 SCK Booked Business for 11/24/10. 5/5/10 SCK

Entering a response does NOT send an email to the CVB sales manager. Typically your response won't be viewed until the "**Member Response Date**". If you find any information in the lead has changed once you talk to the client, or if you have any questions about the information in the lead, please contact the CVB Sales Manager directly by either phone or email.

Meeting Sales – Viewing a Lead

There is a specific “**Action Requested**” area; please be sure to read it before responding.

If there is more than one set of arrival dates, they will be listed as “**Preferred**” and “**Alternate**”. Please respond to all sets of dates listed, even if you cannot offer a room block for a set of dates; respond “**No**” to pursuing and indicate in the “**Comment Section**” why you are not able to offer those dates.

An RFP (or any pertinent file) is available here for download.

LEAD DETAIL: 2011 CIA BLACK OPS								
Lead Information								
Lead ID: 20276	Status: New							
Company: TEST - Really Cool Meeting Account	Last Updated: 04/16/2010 "Lead Status"							
Meeting Name: 2011 CIA Black Ops	Primary Type: Mtg/Conv/Conf							
Sales Manager: Susan Kimball skimball@padutchcountry.com (717) 735-0310	Contact: Jack Bristow 619 E Roseville Rd Lancaster, PA 17601 UNITED STATES (717) 560-6465 x 101 (717) 545-8746 - Fax jack@myemailgoeshere.com Preferred Method: Email							
Decision Date: 07-13-2010	Decision-Making Process: Committee/Board:							
Hotel Response Date: 07-01-2010	Source Code: ASAE							
Room Attendees: 25	Show Attendees: 35							
Company Profile:	Market Segment: Corporate							
Site Inspection? Yes - (06-23-2010)								
Lost Comments:								
Comments:								
Action Requested: Respond to client w/ rates								
Schedule of Events: lite reception first evening board meeting Tues... (Show More)								
Meeting Requirements: Small meeting or board room								
Competitive Sites: Gettysburg, Harrisburg, York								
EET Type: Mtg 2011 O-nt	Lost Business Code: --None--							
Attached Files: RFP March 2009.docx								
Arrival Dates								
Preferred Date: 5/22/2011 - 5/23/2011	Meeting Pattern:							
Alternate Date: 6/23/2011 - 6/24/2011	Date Comments: 1 H/C room							
Alternate Date: 10/5/2011 - 10/6/2011								
Room Summary								
Requested Rooms							Totals and Peak	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Requested Rooms: 20	
05/22							Peak Requested: 20	
20							Additional room requests/needs	
100%								

“**Requested Rooms**” for each night of the block are outlined and the percentage of peak is listed below.

If the client has requested that we collect proposals on their behalf because they do not wish to be contacted by individual properties, the CVB will mark the lead as “**Confidential**”. No client contact information will appear in its usual space.

Room Summary								
Requested Rooms							Totals and Peak	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Requested Rooms: 20	
05/22							Peak Requested: 20	
20							Additional room requests/needs	
100%								

Meeting Sales - Respond to a Lead

To respond to the lead, click “**Add Your Response**”.

You will only be able to add or edit your comments until the “**Response Date**”. After this time, you can view your response, but you will not be able to edit or add a new response. In the case of a confidential lead, contact the CVB Sales Manager and ask if you may still submit a proposal.

Responses						
Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	05/22/2011 - 05/23/2011 (Primary)	05/22/2011 - 05/22/2011	No Response Entered			--Attachments--
Add Your Response	06/23/2011 - 06/24/2011	06/23/2011 - 06/23/2011	No Response Entered			--Attachments--
Add Your Response	10/05/2011 - 10/06/2011	10/05/2011 - 10/05/2011	No Response Entered			--Attachments--

[Return](#)

Enter the “**Rate Range**” you are offering. “**Requested Rooms**” and “**Peak Night Rooms**” will auto-populate when you enter rooms by day below.

Under “**Room Information**”, enter the per-day room block you are offering in either “**Any**” or the appropriate room type. “**Rooms Requested**” is the overall daily total needed.

You can attach your proposal to a lead anytime, but if the lead is confidential you can send it to the CVB. Have your document prepared and saved somewhere on your computer. Under “**File Attachments**”, click “**Add**”. Another window will appear; click “**Browse**,” find your document, click “**Add File**” and then “**Close**” to save.

Click “**Save**” to save the information you have entered and attached. Click “**Return to Lead**” to return to the lead detail. Click “**Return**” button to get back to your list of leads.

You should be able to edit or view your response to leads up until the first requested arrival date.

Entering a response does NOT send an email to the CVB sales manager. Typically your response won’t be viewed until the “**Member Response Date**”. If you find any information in the lead has changed once you talk to the client, or if you have any questions about the information in the lead, please contact the CVB Sales Manager directly by either phone or email.

Rate Range	0	to	0				
Requested Rooms	0			Peak Night Rooms	0		
Room Information							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	05/22/2011	05/23/2011	05/24/2011	05/25/2011	05/26/2011	05/27/2011	05/28/2011
Any Type	0						
Singles	0						
Doubles	0						
Suite	0						
Total	0	0	0	0	0	0	0
Requested	20	0	0	0	0	0	0
File Attachments							
File Attachments:	--None--						
	Add	View	Remove				
	Save		Return to Lead				

The CVB Sales Manager will send a revised sales lead notification email to inform members the dates have changed and a new response is required.

Please notify the CVB if you book the business! It is very important for the CVB to learn when and where business is booked. This applies not only to lodging properties, but to any member type.

- If the response date has not passed, you can enter information in the “**Comments Box**”.
- If the response date has passed, e-mail the CVB Sales Manager directly with your booked business info.
- If you confirm a booking or rooms, please indicate booked business, the date(s) booked by the client, the date you are entering this response information and your initials. Please retain any information previously entered in the response area.

Response Information	
Pursuing this lead?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Comments:	Responded with admission info and rates. 2/12/10 SCK Booked Business for 11/24/10. 5/5/10 SCK

Lead Notification Emails

When a new lead is entered, the CVB Sales Manager will send an email to all members associated with the lead. The email body will contain some details in the lead, including the ID#, Arrival/Departure, whether it is a Tour & Travel or a Meeting Sales lead, etc.

The email notifications are optional, and may also be turned on/off based for just one user group (Tour & Travel vs. Meeting Sales). For example, a Sales Manager with the responsibility of checking the leads would receive the notifications, but a Director of Sales may wish to opt out of the notifications. The DOS can still have a log-in to view the leads at any time. They just won't be notified every time a new lead hits the member account. Please notify the System Administrator for any changes you require for lead notification emails.