

Viewing & Responding to Leads:

1. Click on the Lead ID or Title to open and respond to it
2. Please note that the Hotel Response Date listed is your deadline to be able to respond to the lead online (or edit your response)
3. If a client response is required, click on the client's email address to send your response directly to the client (**respond to the CVB through the extranet in addition to this response**)
4. 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.

Contact: John Smith
 1212 Loop 12
 Dallas, TX 75206
 UNITED STATES
 (214) 571-1000
johnsmith@trainingaccount.com

3rd Party Meeting Planner Contact: Ms. Victoria Schlosser
 3893 California Street
 Ste. 7
 San Diego, CA 92110
 UNITED STATES
 619-546-4568
vschlosser@helmsbriscoe.com

Type: Board Meeting
EET Type: Default_new
Decision Making Process: Self
Status: New
Decision Date: 11/09/2012
Hotel Response Due: 10/31/2012
Repeat Business: No
Sales Manager: Test User
crm@simpleviewinc.com
 123.123.1234

Source Code: Website
Market Segment: Nat. Association
Meeting Pattern: Sun to Wed
Attendees: 230
Site Inspection? No
Confidential: No

Meeting Requirements: This is the description of what is being requested ... (Show More)
Schedule of Events: If events are being conducted, this is where you w ... (Show More)
Action Requested: Please respond via the extranet.
Comments: These are misc. comments. These are misc. comments ... (Show More)
Competitive Sites: Dallas, Raleigh, Bucks County
[Meeting Specs:](#)

- [Tulips.jpg](#)

Arrival Dates: Preferred Date: 11/25/2012 - 11/28/2012
 Alternate Date: 12/2/2012 - 12/5/2012
Date Information: Date Comments:

Requested Rooms							Totals and Peak	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Requested Rooms:	Peak Requested:
11/25	11/26	11/27	11/28				760	200
190	200	200	170				Additional room requests/needs	
95%	100%	100%	85%					

5. In the bottom left corner you will see an "Add Your Response" or "Edit Your Response" link – click the link to open and respond to th

Dates	Month	Year	City	Hotel	Contract Rooms	Pickup Rooms	Rate	Attendees
11/13/2011 - 11/16/2011	November	2011	Dallas, TX	Hilton	740	779	\$199.00	230

Additional Fields

General

Acronym
 VIC Comments
 IACVB
 Facility Type
 Rebate Amount
 NSF
 Send to
 Golf Schools
 Golf Communities
 Golf Tournaments
 Alternate End Date
 Site Inspector Provided

Lost To
 Rebate: No
 commission
 GSF
 Spending
 Proposal Due Date
 Send Proposals To
 Alternate Begin Date
 New Spending
 Is this a repeat booking

Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	11/25/2012 - 11/28/2012 (Primary)	11/25/2012 - 11/28/2012	No Response Entered			No
Add Your Response	12/02/2012 - 12/05/2012	12/02/2012 - 12/05/2012	No Response Entered			No

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

[Leads](#) | [Member Record](#) | [Occupancy](#) | [Service Requests](#) | [Reports](#) | [Partner Bulletins](#)

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6. Fill in the appropriate information, and click "Save" at the bottom
7. Note that items in red are required fields

Bureau Only Comments will only be seen by the Greater Newark CVB (the client will not see them)

Pinehurst CVB

extranet.pinehurst.simpleviewcrm.com/leads/ResponseDetail/Meeting/index.cfm?action=AddResponse&oppid=2467&tblid=5&dateset=1&groupid=3

Response Information

Pursuing this lead? Yes No

Comments:

Bureau-Only Comments:
These comments will not be seen by the client; they will only be seen by the staff of Convention & Visitors Bureau of Pinehurst, Southern Pines & Aberdeen Area.

Rate Range to

Requested Rooms **Peak Night Rooms**

Room Information

	Sunday 11/25/2012	Monday 11/26/2012	Tuesday 11/27/2012	Wednesday 11/28/2012	Thursday 11/29/2012	Friday 11/30/2012	Saturday 12/01/2012
Singles	<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"/>			
Triples	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>			
Quads	<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	190	200	200	170	0	0	0

File Attachments

File Attachments: --None--