

Reviewing Leads:

1. Once you are logged in, click on the “Leads” tab in the upper left hand corner of your screen
2. Automatically only leads in which you can still respond to are displayed. You can filter your leads by the following:
 - a. Status
 - i. New – lead is not lost or definite and the response date has not past
 - ii. Pending – lead is not lost or definite but the response date has past
 - iii. Closed/Won – leads turned definite where your property was chosen
 - iv. Closed/Lost – leads turned definite where your property was not chosen OR the lead was turned to lost business
 - v. Closed/TBD - leads turned definite but the client has not chosen a hotel
 - b. Groups (meeting or tour)
 - c. Whether you have responded or not
 - d. Search for leads by Organization or Lead or Lead ID, once your search term is entered, press tab on the keyboard and the results will be filtered
3. You are able to sort your list of leads by clicking on any of the column headers (i.e. Meeting Name, Organization, etc)
4. If you select “New” under the “Status” drop-down, it will show only the leads that you are still able to respond to

The screenshot displays the Pinehurst CVB Simpleview CRM interface. The browser address bar shows the URL: `extranet.pinehurst.simpleviewcrm.com/leads/index.cfm?clear_rtn=1`. The user is logged in as "Shawn Wilkins" with an "Extranet Training Account". The main navigation menu includes "Leads", "Member Record", "Occupancy", "Service Requests", "Reports", and "Partner Bulletins". The "Leads" section is active, showing "ALL LEADS - CURRENTLY 1 IN VIEW".

Filters: New (selected), --Any Status--
--All Groups-- | --All Responses-- | Search By Keyword

Lead	Opportunity ID	Opportunity	Organization	Hotel Response Date	Arr/Dept Dates	Status	Responded	Create Date
Meeting Sales 2457		Annual Meeting	Training Account	10/31/2012	Nov 25-28, 2012	New	No	10/23/2012

Number of Results: 25

Footer: | Leads | Member Record | Occupancy | Service Requests | Reports | Partner Bulletins | simpleview | Version 3.0, Copyright ©2003-2012 simpleview, inc. All rights reserved.