Welcome to **Visit Mississippi Gulf Coast's** Extranet

Responding to Sales Leads

### http://Extranet.gulfcoast.simpleviewcrm.com

Logging in:

Your e-mail address is your **Username**:
Password: you received a generic password when you were set up to receive leads by Extranet.
You then selected your own unique password. If you forget your password, you can click on Forgot Password? and one will be sent to you automatically.

Once logged in, you should be looking at a screen similar to this, not all features will be available to all users.
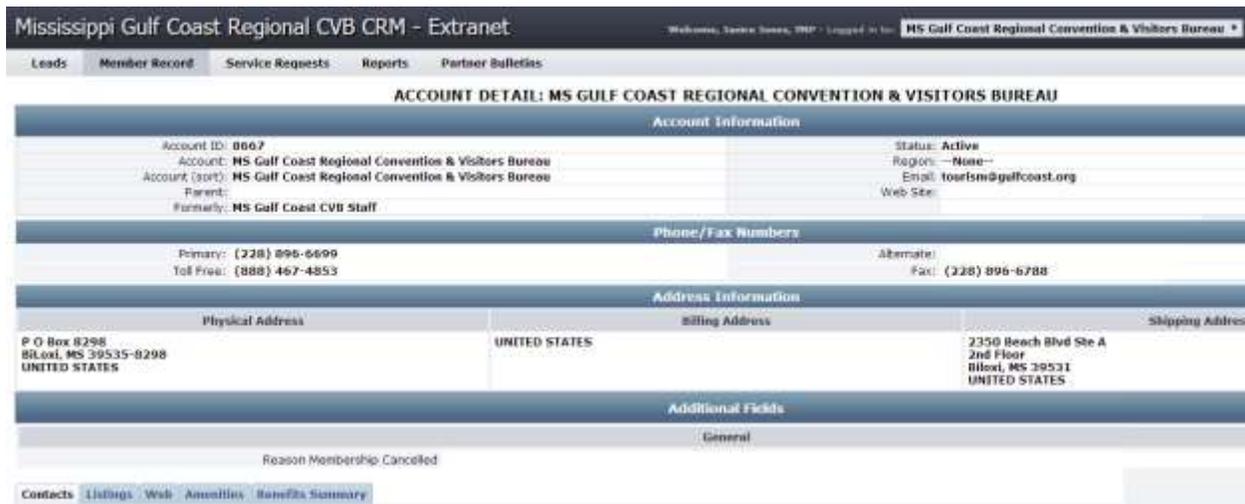
LEADS:

Partner Extranet

As one of the sales people for your business you are a Sales Lead Catcher and have access to all leads generated by the Bureau according to your sales segment (Meeting sales, Sports Marketing, & Tour/Travel). If you have one person in your organization who assigns leads, you must take care of that internally.

Click on the leads tab (upper left-hand corner under MISSISSIPPI GULF COAST REGIONAL CVB CRM - EXRANET), you should be looking at screen similar to this:

Lead Type	Lead ID	Lead Name	Organization	Hotel Response Date	Arr/Dept Dates	Status	Responded	Create Date
Meeting Sales	5247	2015 July Summer Institute	National Academic Advising Association	3/7/2014	Jul 25-Aug 2, 2015	New	Yes	2/25/2014
Meeting Sales	5246	2015 June Summer Institute	National Academic Advising Association	3/7/2014	Jun 20-28, 2015	New	Yes	2/25/2014
Meeting Sales	5258	2015 Spring Annual Meeting	Mississippi Fire Investigators Association	3/11/2014	Mar 24-27, 2015	New	Yes	2/28/2014

Meeting Sales	5245	2014 Event	Geekonomicon	3/7/2014	Dec 11-15, 2014	New	No	2/24/2014
Meeting Sales	5260	2014 Leadership Team Meeting	Atmos Energy Corporation MS Division	3/12/2014	Oct 7-9, 2014	New	No	3/5/2014

Reviewing Leads:

1. Once you are logged in, click on the "Leads" tab in the upper left hand corner of your screen.
2. By default, only leads in which you can still respond to are displayed. You can use the filters to view leads by the following:
   a. Status
      i. New – lead is not lost or definite and the response date has not yet passed
      ii. Pending – lead is not lost or definite but the response date has passed
      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, Tour, or Media)
   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 have not yet responded to

Viewing, Responding to Leads:

1. Click on the Lead ID or Title to open and respond.
2. The Hotel Response Date listed is your deadline to respond. Once this date has passed, you will no longer be able to respond to the lead online (or edit your response).
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.
4. 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 this lead
   Fill in the appropriate information, and click "Save" at the bottom
5. Note that items in red are required fields
6. Bureau Only Comments will only be seen by Mississippi Gulf Coast Regional CVB (the client will not see them)
7. Under the Room Information you will see File Attachments. This is where you upload your proposal. You **MUST** upload a proposal (your bid letter, floor plans, property amenities, what you need to send to sell your property).

8. Once you click Save, an email is generated and sent to the Sales Manager letting them know that you have entered your response.

Entering Pickup

1. Once a meeting has been turned into Definite business, you will see a "Pickup" section at the bottom of the screen beneath the response.
2. After the meeting has taken place, you can enter the number of rooms you received from this meeting.

UPDATING CONTACT RECORDS

If you have access to record details such as contacts, please do not replace anyone's name when a position changes. Use the CLONE feature and put in the new person's name. EXAMPLE:

Beth Carriere leaves her position and Crystal Johnson takes her place. Click on Beth's name and you see your contact details. You would CLONE Beth Carriere replacing all of Beth's information with Crystal's information.

Then open Beth Carriere's record and make her Contact Type Inactive.

This preserves the integrity of our database and allows a brand new start for the new sales person, with all of the appropriate leads and communications being sent to the proper person.

For questions regarding the **actual lead**, please contact the CVB sales representative who sent you the lead.

For questions regarding your **Extranet** access, please contact:

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