



**PUNTA GORDA
ENGLEWOOD BEACH**

The Charlotte Harbor Gulf Island Coast

Partner Portal Instructions: Reviewing and Responding to Leads

Opportunities / Leads:

Upon logging in, click the magnifying glass at the top of the screen, which will display the Quick Search function. Type in the Lead ID # which is listed on your email notification and click the corresponding Meeting Name.

The screenshot shows the Punta Gorda/Englewood Beach VCB Partner Portal. A blue arrow points to the magnifying glass icon in the top right corner of the header. Below the header, there is a banner for the '1 Henry + 2 Flaglers = 1 Happy VCB' award. The main content area displays 'Partner Bulletins' and a 'Post Board' with a list of items. A 'Quick Search' modal is open, showing a search bar with a magnifying glass icon.

OR

Upon logging in, click the **Opportunities icon**, select RFP, Media Lead or Service Request to see leads sent by the Punta Gorda/Englewood Beach Visitor & Convention Bureau (VCB).

The screenshot shows the Punta Gorda/Englewood Beach VCB Partner Portal with the 'Opportunities' icon highlighted in the left sidebar. The main content area displays the 'RFPs' section. A blue arrow points to the 'Opportunities' icon in the sidebar. The 'RFPs' section includes a 'Filters (1)' panel with various search criteria and a table of results.

Filters (1)

- Responded is: [Dropdown]
- Response Date: [-All Dates-]
- Lead Name contains: [Text Input]
- Create Date: [-All Dates-]
- Lead ID contains: [Text Input]
- Organization contains: [Text Input]
- Group Type is one of: [CHOOSE +]
- Property Lead Status is one of: [OPEN, OPEN/ BID SENT +]

APPLY FILTERS **CLEAR FILTERS**

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)
	63	Click off to Fail	Open	09/15/2021	Meeting	Sporting Event	Applegate Designs	ABC Tourism Company Inc.	10/08/2021	11/13/2021	11/14/2021

Page 1 of 1 Go to Page: 1

The filters in this grid determine which Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the “Apply Filters” button. By default, you will see all your Open Leads and the Open/Bid Sent Leads you have already bid on.

• LEAD STATUS DEFINITIONS

- **Closed/No Bid Sent:** These Leads can be Pending, Definite, Lost, or Cancelled. The status signifies this is business your property did not bid on and the response due date has passed.
- **Open:** These are Leads in a pending status that your property has not bid on and the response due date has not passed.
- **Open/Bid Sent:** These are Leads in a Pending status that your property has already placed a bid on and the response due date has not passed. In this status, you can update your response at any time.
- **Turned Down:** These Leads can be Pending, Definite, Lost or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.
- **Closed/Decision Pending:** Your property has placed a bid, but the response due date has passed thus you cannot edit your response.
- **Closed/Lost to Another City:** These are Leads you were pursuing, but the business has been lost.
- **Closed/Cancelled:** These are Leads where you won the business, but the group has cancelled.
- **Closed/Won:** These are Definite Leads in which your property was selected.
- **Closed/Won - Properties TBD:** These are definite Leads, but the group has not decided on a hotel yet.
- **Closed/Lost:** These are Definite Leads in which your property was not selected for the business.

Reviewing Leads:

Below the filters section, you will see a data grid with all your Leads based on the selected filters. You are able to sort your list of leads by clicking on any of the column headers (i.e. Opportunity Name, Organization, etc.). Click on the Lead Name or ID to open and respond to the Lead. All responses must be entered by the Response Due Date.

To view a Lead, click on the Eyeball icon or the Lead Name.



Page 1 of 1 Go to Page: 1											
Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)
	63	Click off to Fall	Open	09/15/2021	Meeting	Sporting Event	Applegate Designs	ABC Tourism Company Inc.	10/06/2021	11/12/2021	11/14/2021
Page 1 of 1 Go to Page: 1											



1. Reviewing Leads:

When viewing the Lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the Lead, these can generally be found in the Lead Information section.

Lead Details

PRINT

RETURN

Sections:

- Revision Notes
- Lead Information
- Meeting Dates
- Room Data
- Room Summary
- Responses

Revision Notes

No revision notes have been entered.

Lead Information

Lead ID

63

Meeting Name

Kick off to Fall

Organization

Applegate Designs

Contact

*Confidential

Type

Sporting Event

Market Segment

Collegiate

Room Attendees

300

Show Attendees

600

Site inspection

No

Response Due

10/08/2021

Repeat Business

Yes

Meeting Requirements

Need 5 soccer fields

Schedule of Events

Action Requested

Comments

Sales Manager

Lena Applegate
Lena.Applegate@PureFlorida.com
(941) 764-4938

2. Add a Response to the RFP, Media Lead or Service Request:

After you have reviewed the Lead, scroll down to the Responses section. Here you will have the option to either add or edit your existing response.

Note: these options are not available once the Response Due Date has passed.

Click the “Plus” icon to enter or edit your response.

Responses

ABC Tourism Company Inc.

Status Open

Contracts

PRINT RESPONSE LOG

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	11/12/2021 - 11/14/2021 **Preferred Date**	11/11/2021 - 11/15/2021		

Data entered in the Response form is sent directly to the Punta Gorda/Englewood Beach Visitor & Convention Bureau for review. The Response section is used to send comments, room rates, room block information, and any file attachments that you wish to include.

New Response

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments
- Lodging Request

Lead Information

Lead ID: 63

Meeting Name: Kick off to Fall

Organization: Applegate Designs

Contact: *Confidential

3rd Party Meeting Planner

Meeting Planner Contact: *Confidential

Additional room requests/needs

Response Information

Pursuing This Lead: *Required ☐ NO ☒ YES

Account: *Required ABC Tourism Company Inc.

Comments:

Rate Range: From To

Rooms Offered:

Peak Night Rooms:

- Items in red are required fields.
- When adding or editing your response, you will need to tell the Bureau if you are pursuing (bidding on) the Lead by selecting “Yes or No” to the “Pursuing this Lead” option.
- The Comments section can be used to respond to any specifics from the Lead.
- Enter your range.
- The Room Information section of the response page is where you can enter the number of rooms, by room type that your property can commit to for this lead.

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments
- Lodging Request

Room Information

	Thu 11/11/2021	Fri 11/12/2021	Sat 11/13/2021	Sun 11/14/2021	Mon 11/15/2021	Tue 11/16/2021	Wed 11/17/2021
Double	0	0	0	0	0		
King	0	0	0	0	0		
Suite	0	0	0	0	0		
Total	0	0	0	0	0		
Requested	0	0	0	0	0		

- File Attachments – Attach a proposal or any additional information to your response (i.e., hotel amenities).

The screenshot shows a section titled "File Attachments". It features a blue button labeled "ATTACH FILE" followed by the text "or drag files to the page". Below this is a light gray box containing the text "No files have been attached".

- The Lodging Request section of the response page is where you can enter any commission, rebate, housing fee and/or lead discussion points.

The screenshot shows a section titled "Lodging Request". It contains two rows of questions, each with radio button options for "YES" and "NO", and a text input field for a percentage.

Question	YES	NO	Input Field
Are you willing to provide a commission/rebate?:	<input type="radio"/>	<input type="radio"/>	Please list commission/rebate amount.: %
Are you willing to offer a comp room ratio?:	<input type="radio"/>	<input type="radio"/>	If so, please list ratio (i.e.: 1:20):

Once you have finished entering all your response information don't forget to click the save button!


3. Lead Pickup Reporting:

Part of the Lead process is to report room Pickup information after the group has checked out. To see what past business is available for your Property to report pick up on, you will need to access the RFP Page. Adjust the Filter Grid to include a status of Closed / Won.

The screenshot shows a "Filters (1)" section with various filter criteria. A blue arrow points to the "Property Lead Status is one of:" dropdown, which is currently set to "3 SELECTED". Another blue arrow points to the "Closed/ Won" option in the dropdown menu. The dropdown menu is open, showing a list of status options with checkboxes.

Property Lead Status is one of:
3 SELECTED
Closed/ No Bid Sent
Open
Open/ Bid Sent
Turned Down
Closed/ Decision Pending
Closed/ Lost to Another City
Closed/ Cancelled
Closed/ Won
Closed/ Won - Properties TBD
Closed/ Lost
Assist

To access the Lead, click on the Eyeball icon or the Lead Name.



Actions	Group Type	Lead ID	Lead Name	Organization	Response Date	Arrival (Preferred)	Departure (Preferred)	Property Lead Status	Responded	Create Date
	Meeting	17330	Test for Partner: Portal Launch 4 Q	Punta Gorda/ Englewood Beach- Visitors Bureau	12/01/2041	12/05/2041	12/05/2041	Open	No	07/20/2016
	Meeting	17285	Test for Partner: Portal Launch 4 Q	Punta Gorda/ Englewood Beach- Visitors Bureau	12/01/2041	12/05/2041	12/05/2041	Closed/ Won	Yes	07/11/2016
	Meeting	17285	Test for Partner: Portal Launch 4 Q	Punta Gorda/ Englewood Beach- Visitors Bureau	12/01/2041	12/05/2041	12/05/2041	Closed/ Won	Yes	07/11/2016

Pickup information is contained within the Room Data section. Click on the Pickup button to access the room block information.

Room Data

Add/Edit	Property	Update Booked Rooms by Days Out				Total Pickup
		120 Days	90 Days	60 Days	30 Days	
Daysout Pickup	FWCVB					
Daysout Pickup	Simpleview, Inc.					

The Pickup Rooms section is where you can enter the number of rooms and average daily room rate, that your property provided for this Lead.

SAVE

CANCEL

Peak requested: 20

Additional room requests/needs

Sections:

- Lead Information
- Room Summary
- Pickup Rooms

Pickup Rooms

Pickup Rooms:

Pickup Avg. Daily Room Rate:

\$ \$0.00

Sun	Mon	Tue	Wed	Thu	Fri	Sat
12/20/2015	12/21/2015	12/22/2015	12/23/2015	12/24/2015	12/25/2015	12/26/2015
0	0	0	0			

Be sure to click the Save after you have supplied the appropriate room information.