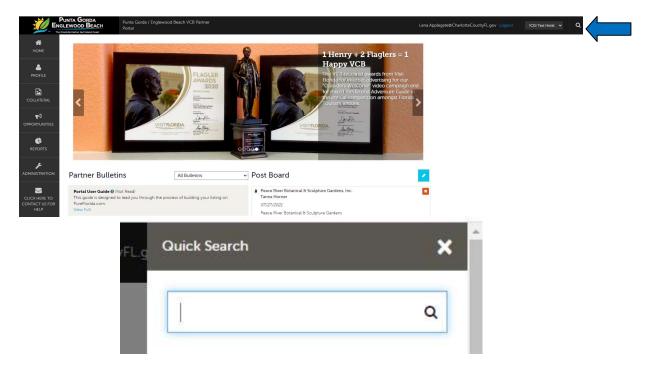# Partner Portal Instructions: Reviewing and Responding to Leads
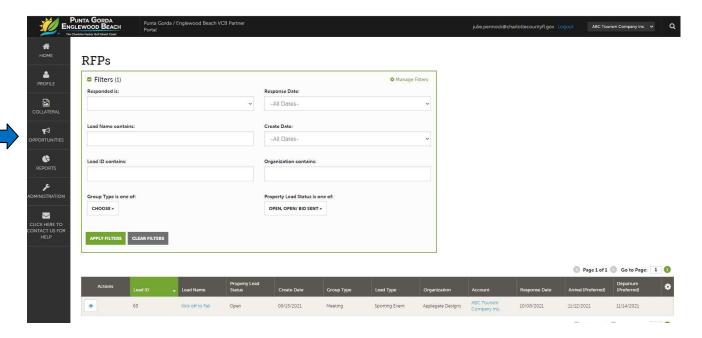
Opportunities / Leads:

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.

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 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.

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.

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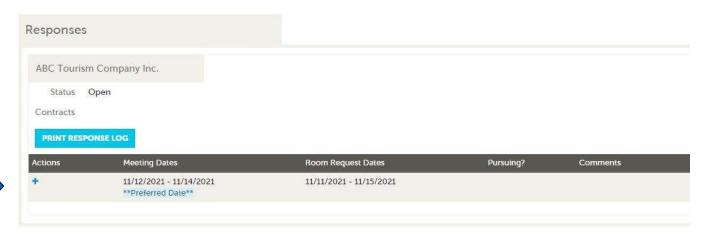
Note: these options are not available once the Response Due Date has passed.

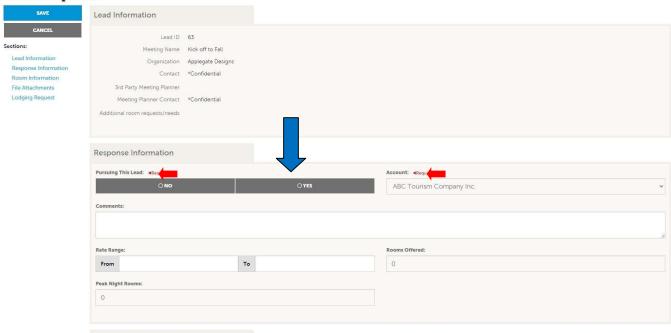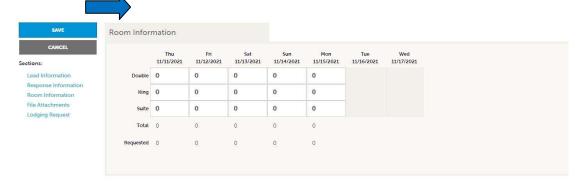Click the "Plus" icon to enter or edit your response.

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.

- ➢ 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.

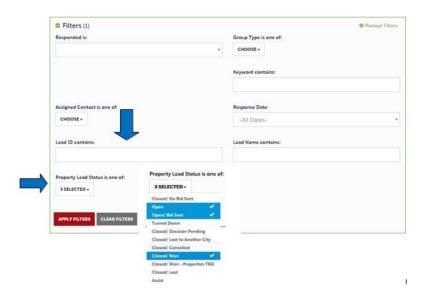➢ File Attachments – Attach a proposal or any additional information to your response (i.e., hotel amenities).

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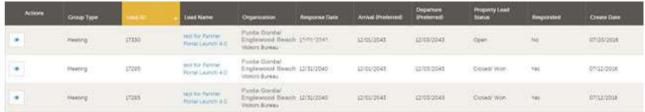

Once you have finished entering all your response information don't forget to click the save button!

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.

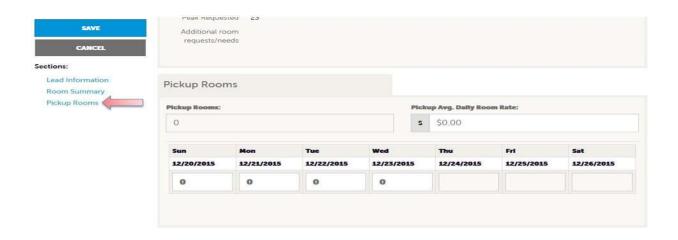To access the Lead, click on the Eyeball icon or the Lead Name.

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

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.

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