

Login Screen – Opportunities/Leads/RFPs

Coastal Mississippi

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LOGIN

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Home Screen (Opportunities/Leads/RFPs)

Clicking the **Opportunities** icon, displays options for RFPs (**LEADS**) sent by Coastal Mississippi. Opportunities are broken in to RFPs (Meeting Sales Leads = all market segments), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs).

Opportunities/Leads/ RFPs

RFPs

Filters (1) Manage Filters

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Status is one of:

After you click the RFP icon and then RFPs, you will be presented with your property's Sales Leads. By Default, you will see all of your **Open Leads** and **Opens Leads** you have already bid on.

The filters in this grid determine what 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.

Opportunities/Leads/ RFPs (cont'd)

LEAD STATUS DEFINITIONS

On the extranet you will see 10 different statuses in which a Lead can be in. These statuses are:

- 1. Closed / No Bid Sent:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Closed/No Bid Sent status signifies this is business your property did not bid on and the response due date has passed.
- 2. Open:** These are Leads in a tentative status that your property has not bid on and the response due date has not passed.
- 3. Open / Bid Sent:** These are Leads in a tentative 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.
- 4. Turned Down:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.
- 5. Closed / Decision Pending:** These are Leads in a tentative status that your property has placed a bid on, but the response due date has passed thus you cannot edit your response.
- 6. Closed / Lost to Another City:** These are Leads you were pursuing, but the business has been lost.
- 7. Closed Cancelled:** These are Leads where you won the business, but the group has cancelled.
- 8. Closed / Won:** These are definite Leads in which your property was selected.
- 9. Closed / Won - Properties TBD:** These are definite Leads but the group has not decided on a hotel yet.
- 10. Closed Lost:** These are definite Leads in which your property was not selected for the business.

Opportunities/Leads/ RFPs (cont'd)

Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	⚙️
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016	Sprocket
←	12005	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016	

Below the filters section, you will see a data grid with all your Leads based on the selected filters. You can change these data grid column headings to your preference by clicking the sprocket icon in the top right corner of the data grid.

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

Opportunities/Leads/ RFPs (cont'd)

RETURN

Sections:

- Lead Information
- Meeting Dates
- Additional Lead Information
- Room Summary
- History/Futures
- Notes
- Responses
- Signage
- General
- Room Data

crm@simpleviewinc.com
123.123.1234

Meeting Requirements: See attached RFP for more details.

Schedule of Events

Action Requested

Comments

Competitive Sites

Meeting Specs: 2016-Annual-Convention-RFP.docx

Lost Business Code

Lost Comments

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 one of two areas: Lead Information and/or Notes section. In the above graphic, this is the Lead section; attachments will be found in the Meeting Specs field.


Opportunities/Leads/ RFPs (cont'd)

RETURN

Sections:

- Lead Information
- Meeting Dates
- Additional Lead Information
- Room Summary
- History/Futures
- Notes
- Responses
- Signage
- General
- Room Data

Notes

File	Title	Category	Description
	2016 Annual Convention RFP	Spec Sheet	See attached RFP


Responses

Simpleview Hotel and Conference Center

Status Open

Currently Assigned None (Assign)

[PRINT RESPONSE LOG](#) [ADD NEW CONTRACT](#)

Add/Edit	Room Request Dates	Pursuing?	Comments
	02/01/2016 - 02/05/2016		

When scrolling to the Notes section, you will see the detailed notes for this piece of business. If an attachment is present, this will be signified with a paperclip icon. After you have reviewed the Lead, scroll to the **Responses** section. Here you will see options to either add or edit your existing response.

Note: these options are not available once the **Response Due Date** has passed. Click the Add Response button (+) to add your response or Pencil to edit your previous response.

Opportunities/Leads/ RFPs (cont'd)

Update Response

SAVE

CANCEL

Sections:

Lead Information

Response Information

Room Information

File Attachments

Lead Information

Section Collapsed, click header to expand.

Response Information

Pursuing this lead: ◀Required

NO



YES

Account: ◀Required

Simpleview Hotel and Conference Center ▼

Comments: ◀Required

When adding/editing your response, you will need to let Coastal Mississippi if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option

Opportunities/Leads/ RFPs (cont'd)

SAVE

CANCEL

Sections:

[Lead Information](#)

[Response Information](#)

[Room Information](#) 

[File Attachments](#)

Room Information

	Mon 02/01/2016	Tue 02/02/2016	Wed 02/03/2016	Thu 02/04/2016	Fri 02/05/2016	Sat 02/06/2016	Sun 02/07/2016
Doubles	0	0	0	0	0		
Multiple	0	0	0	0	0		
Kings	0	0	0	0	0		
Suites	0	0	0	0	0		
Singles	0	0	0	0	0		
Queen Room	0	0	0	0	0		
Total	0	0	0	0	0		
Requested	10	10	10	10	10		

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.

Opportunities/Leads/ RFPs (cont'd)

The screenshot displays a web application interface. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' menu with four items: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. The 'File Attachments' item is highlighted with a red arrow pointing to it. The main content area is divided into two sections. The top section is a summary table with the following data:

Total	0	0	0	0	0
Requested	10	10	10	10	10

The bottom section is titled 'File Attachments' and contains a blue 'ATTACH FILE' button, the text 'or drag files to the page', and a red arrow pointing to the text. Below this is a light grey box with the text 'No files have been attached'.

To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section.

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

Opportunities/Leads/ RFPs Pickup

A part of your Lead process may be to add room Pickup information. This data can only be added to RFPs that your Property has won and if the DMO has identified you as a Pickup Manager.

If you have any questions regarding Room Pickups, please contact Renata Flot-Patterson, renata@coastalmississippi.co or Janice Jones, janice@coastalmississippi.com.

Opportunities/Leads/RFPs Pickup (cont'd)

RFPs

The screenshot shows a filter grid with the following fields:

- Filters (1)** (with a gear icon and "Manage Filters" link)
- Responded is:** (dropdown menu)
- Response Date:** (dropdown menu, currently set to "-All Dates-")
- Lead Name contains:** (text input field)
- Create Date:** (dropdown menu, currently set to "-All Dates-")
- Lead ID contains:** (text input field, with a red arrow pointing to it)
- Organization contains:** (text input field)
- Group Type is one of:** (dropdown menu, currently set to "CHOOSE")
- Property Lead Status is one of:** (dropdown menu, currently set to "3 SELECTED")



The dropdown menu for "Property Lead Status" is open, showing the following options:

- 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

At the bottom of the filter grid, there are two buttons: "APPLY FILTERS" (green) and "CLEAR FILTERS" (grey). A red arrow points from the "APPLY FILTERS" button towards the text below.

After the business has past, you should receive an e-mail from **Renata Flot-Patterson** asking you to update the room pickup giving you the name of the group and the dates they should have been at your property. Adjust the Filter Grid to include a status of **Closed / Won** and then apply filters. To limit the results to a specific Lead, you can enter the name of the lead from Renata's e-mail.

Opportunities/Leads/RFPs Pickup (cont'd)

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12169	Simpleview Summit 2016	Closed/Won	11/25/2015	Meeting	Convention	chris martin account	Simpletime z hotel	12/31/2015	04/18/2016	04/20/2016	
	10058	Karate for Kids Meeting 2015	Closed/Won	01/01/2007	Meeting	Group	Karate for Kids	Hilton by the Shore	12/01/2015	12/15/2015	12/18/2015	

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

Opportunities/Leads/RFPs Pickup (cont'd)

RETURN

Sections:

Additional Lead Information

Lead Information

Meeting Dates

Room Summary

History/Futures

Notes

Responses

Room Data

Signage

General



Lead ID 10058

Meeting Name Karate for Kids Meeting 2015

Account Hilton by the Shore

Profile Karate Affiliation

Organization Karate for Kids

Organization 4956 N Park Ln
Address Bonham TX 75418

Contact Rita Duncan
4956 N Park Ln
Bonham TX 75418
United States

520-424-1020 (Ext. 680)
rduncan@karateforkids.com

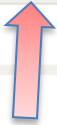
Meeting Planner
Contact

When viewing the Lead, you can skip to difference sections by clicking the left navigation. In the above graphic, this is the Lead Information section; **Pickup information** is contained within the **Room Data section**.

Opportunities/Leads/RFPs Pickup (cont'd)

Room Data

Add/Edit	Property	Booked Rooms by Days Out				Total Pickup
		120 Days	90 Days	60 Days	30 Days	
Daysout Pickup	Hilton by the Shore					



Click on the Pickup button to access the room block information.

Opportunities/Leads/RFPs Pickup (cont'd)

SAVE

CANCEL

Peak requested 25

Additional room requests/needs

Sections:

[Lead Information](#)

[Room Summary](#)

[Pickup Rooms](#)



Pickup Rooms

Pickup Rooms:

Pickup Avg. Daily Room Rate:

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			

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.