



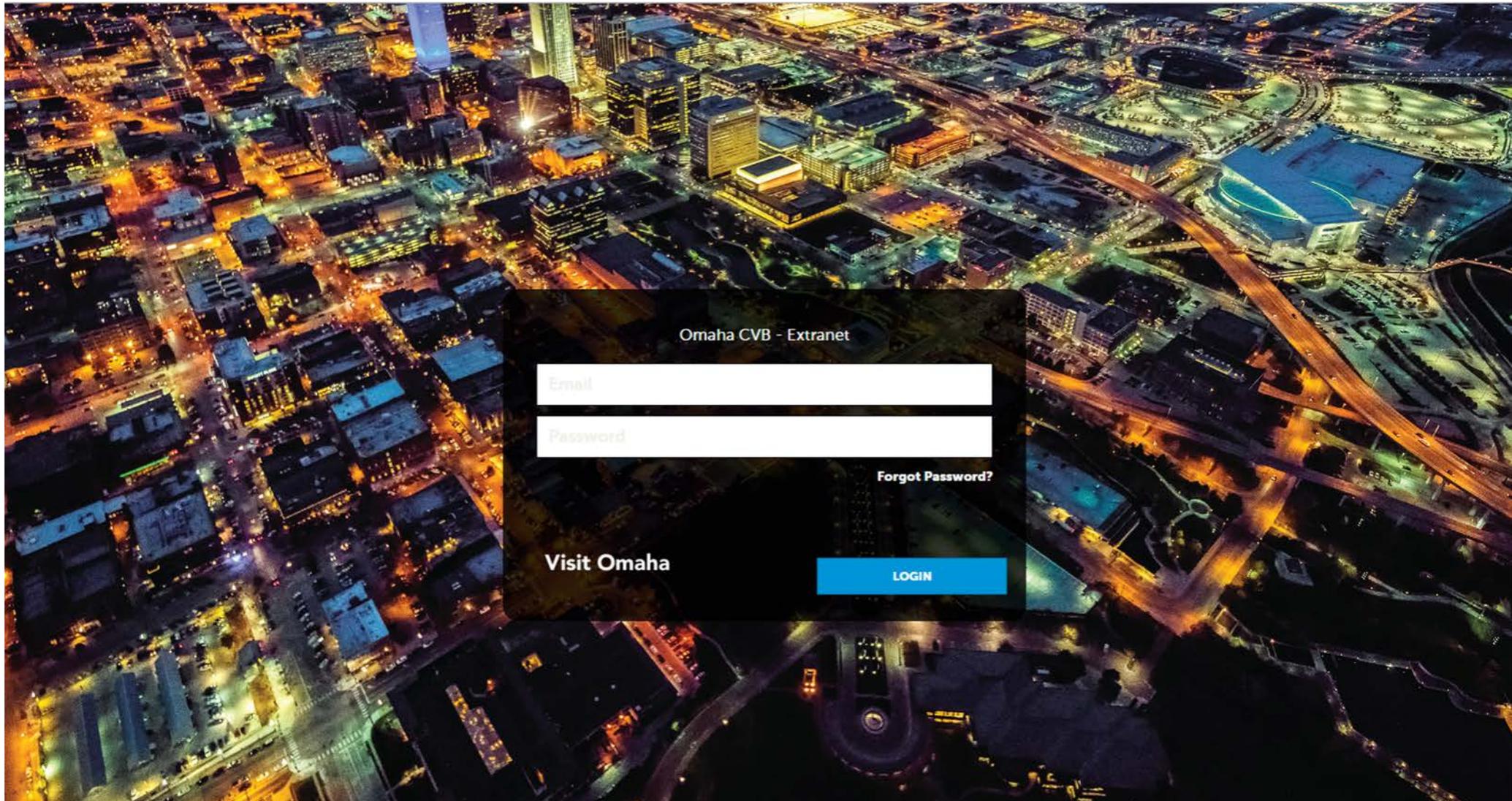
PARTNER EXTRANET TRAINING GUIDE: RFPS, LEADS AND SERVICE REQUESTS

Questions, Comments, Concerns

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Opportunities
Manage your Opportunities

- RFPs
- Media Leads
- Service Requests

Listings See Details Views

Month	Listings
Jun	25
Jul	41
Aug	37
Sep	11
Oct	22
Nov	36
Dec	13
Jan	13
Feb	7
Mar	17
Apr	13
May	6

Offers See Details

Month	Offers
Jun	0
Jul	0
Aug	0
Sep	0
Oct	0
Nov	0
Dec	91
Jan	118
Feb	82
Mar	213
Apr	202
May	139

Clicking the **Opportunities** icon, displays options for RFPs sent by Visit Omaha. Opportunities are broken into **RFPs** (Meeting and Tour Leads), **Media Leads** (travel writer RFPs), **Service Requests** (non-room specific RFPs).

OPPORTUNITIES - RFPS

RFPs

Filters (1) Manage Filters

Responded is:

Lead Name contains:

Group Type is one of:

Property Lead Status is one of:

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)	
No Records Were Found												

After you click the **RFP** icon and then **RFPs**, you will be presented with your business's **Sales and Tour Leads**. 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. By default, you will see all of your Open Leads and Open Leads you have already bid on. For more on Lead statuses and their definitions see the next page.

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 - RFPS (CONT'D)

RFPS

Filters (1) Manage Filters

Responded is:

Lead Name contains:

Group Type is one of:

Property Lead Status is one of:

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)	
No Records Were Found												

Below the filters section, you will see a data grid with all your Leads based on the selected filters. One of the more important column headings is the **Group Type**. This signifies if you are looking at a **Meeting Sales** or **Tour Lead**.

To view a lead, click on the eyeball icon or the lead name.

OPPORTUNITIES - RFPS (CONT'D)

The screenshot displays a CRM interface for viewing a lead. On the left is a navigation menu with a 'RETURN' button at the top. Below it, the word 'Sections:' is followed by a list of menu items: 'Lead Information', 'Meeting Dates', 'Additional Lead Information', 'Room Summary', 'History/Futures', 'Notes', 'Responses', 'Signage', 'General', and 'Room Data'. A red arrow points to 'Lead Information'. The main content area on the right shows contact information: 'crm@simpleviewinc.com' and '123.123.1234'. Below this is a list of sections: 'Meeting Requirements', 'Schedule of Events', 'Action Requested', 'Comments', 'Competitive Sites', 'Meeting Specs', 'Lost Business Code', and 'Lost Comments'. A red arrow points to the text 'See attached RFP for more details.' next to 'Meeting Requirements'. Another red arrow points to the attachment '2016-Annual-Convention-RFP.docx' next to 'Meeting Specs'.

When viewing the lead, you can skip to different sections by clicking the left navigation. Notes and attachments on the lead can generally be found in one of two areas: **Lead Information** and/or **Notes** sections. In the above graphic, this is the Lead section; attachments will be found in the **Meeting Specs** field. For the **Notes** section, see next page.

OPPORTUNITIES - 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 tell Visit Omaha if you are pursuing the business by selecting **Yes** or **No** to the **Pursuing this Lead** option.

OPPORTUNITIES - 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 - RFPS (CONT'D)

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments

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

File Attachments

ATTACH FILE or drag files to the page

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—MEDIA LEADS

Media Leads

Filters (0) Manage Filters

Status is one of: CHOOSE ▾

Responded is: ▾

APPLY FILTERS



Actions	Lead Name	Account	Lead Type	Response Due	Arrival	Departure	
	Rita Writa	Visit Omaha	Test	03/02/2012	03/12/2012	03/16/2012	

Page 1 of 1 Go to Page: 1

By clicking the **RFP** icon and then selecting **Media Leads**, you can view leads sent to your property by Visit Omaha’s Public Relations department. These are usually requests for hosting travel writers or bloggers. These Leads can be responded to by viewing the lead; see next page for responding.

Note: **Media Leads** function the same as **Sales** and **Tour Leads** including their statuses. See **Opportunities – RFPs** section for more details on this.

OPPORTUNITIES—MEDIA LEADS (CONT'D)

RETURN

Sections:

- Opportunity Information
- Responses ←
- Notes
- General

→

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- File Attachments

Responses

Simpleview Hotel and Conference Center

Status: Open

Add/Edit	Room Request Dates	Pursuing?	Comments
	09/10/2015 - 09/13/2015		

Response Information

Pursuing this lead: ◀Required

YES NO

Account: ◀Required

Simpleview Hotel and Conference Center ▼

Comments: ◀Required

As with **Sales** and **Tour Leads** you can also respond or edit an existing response to **Media Leads** by scrolling to the **Responses** section and clicking the pencil icon. Within responses you are also able to specify if you are pursuing the business and add attachments.

OPPORTUNITIES – SERVICE REQUESTS

Service Requests

Filters (0) Manage Filters

Status is one of:

Lead contains:

APPLY FILTERS



Page 1 of 4 Go to Page: 1

Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees	
	Airport Transportation	Visit Omaha	Transportation	12/15/2011	12/07/2011	12/09/2011	1	
	Airport Welcome	Visit Omaha	Info Table Staff		04/25/2017	04/26/2017		

By clicking the **RFP** icon and then selecting **Service Requests**, you can view non-room night specific leads sent to your business. These requests can range from transportation, audio/visual, catering, etc...

Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about the service request or click the name of the request.

OPPORTUNITIES – SERVICE REQUESTS

The screenshot displays a service request interface. On the left, there are two navigation panels. The top panel has a 'RETURN' button and a list of sections: Request Information, Request Dates, Contact Information, Additional Notes and Documents, and Accounts/Responses. The bottom panel also has a 'RETURN' button and the same list of sections. The main content area shows details for a service request:

- Attendees: 1200
- Deadline: 08/12/2015
- Budget: \$13,000
- Location: To/From Hotel & Convention Center
- Description: Need transportation shuttles for convention running all day from 7am to 7pm.
- Additional Documents: [2016-Annual-Convention-RFP.docx](#)

Below the details, there is a message: "Section Collapsed, click header to expand." Below this, the "Additional Notes and Documents" section is expanded, showing a table with the following data:

File	Title	Category	Description
	RFP	Spec Sheet	See attached RFP for more details

Red arrows point from the 'Request Information' section in the top navigation panel to the details area, from the 'Additional Notes and Documents' section in the top navigation panel to the description, and from the 'Additional Notes and Documents' section in the bottom navigation panel to the table. Another red arrow points from the 'Additional Documents' list item to the document link.

When viewing the service request, you can get details in the **Request Information** section along with **RFP** attachment downloads.

OPPORTUNITIES – SERVICE REQUESTS

The screenshot displays a web interface for managing service requests. On the left, a table titled "Accounts/Responses" is visible, with a red arrow pointing to the "Accounts/Responses" header and another red arrow pointing to a pencil icon in the "Actions" column for the "Simpleview Hotel and Conference Center" entry. The table has the following data:

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Respo

Below the table is a "General" section. On the right, a modal window titled "Response for Simpleview Hotel and Conference Center" is open. It features a "Pursuing:" field with a red arrow pointing to it, which is marked as "Required". Below this field are two radio button options: "YES" and "NO". Below the radio buttons is a "Comments:" field, also marked as "Required", with a text input area below it.

If the response due date has not passed, you are able to add/edit a response by clicking the Pencil icon in the **Accounts/Responses** section of the service request. Once clicked, you can tell Visit Omaha if you are pursuing this piece of business by clicking the **Yes** or **No** option in the **Pursuing** section to the right side of the page.

OPPORTUNITIES – SERVICE REQUESTS (CONT'D)

The screenshot shows a web interface for managing service requests. On the left, there is a table under the heading "Accounts/Responses" and a "General" section below it. The table has columns for "Actions", "Company", "Status", and "Response". The "General" section lists various categories like "Decision Date", "Food / Beverage", "Misc. Expense", "Category", and "Economic Value - Lauren Test". On the right side, there is a "Bureau-Only Comments" section with a text area and an "ATTACH A FILE" button. Below this is a message "No files have been attached". At the bottom right, there are "UPDATE" and "CANCEL" buttons. Red arrows point to the "ATTACH A FILE" and "UPDATE" buttons.

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Respo

Bureau-Only Comments:
These comments will not be seen by the client. They will only be seen by bureau staff.

ATTACH A FILE

No files have been attached

UPDATE **CANCEL**

As you scroll down the response page on the right, you have the ability to attach proposals by clicking **Attach File** button or click and drag the file from your computer. *Be sure to scroll to the button and click the **Update** button to save your changes!*

OPPORTUNITIES – RFP PICKUP

RFPs

Filters (1) Manage Filters

Responded is:

Lead Name contains:

Group Type is one of:

Property Lead Status is one of:

Actions	Lead ID	Lead Name	Property Lead Status	Group Type	Lead Type	Organiz
	7035	AMERICAN CLASSIC TOURS	Closed/ Won	Closed/ Won	Tour	Grayslak Classic T

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.

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** and then apply filters. To limit the results to a specific lead, you can provide the lead ID.

OPPORTUNITIES – RFP 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)	
	7035	AMERICAN CLASSIC TOURS	Closed/ Won	05/11/2012	Tour		Grayslake American Classic Tours	Visit Omaha		12/04/2006	12/07/2006	
	5760	IOWA STATE SAVINGS BANK	Closed/ Won	08/24/2010	Tour		Iowa State Savings Bank	Visit Omaha		09/19/2007	09/20/2007	

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

OPPORTUNITIES – RFP PICKUP (CONT'D)

RETURN

Sections:

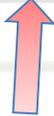
- Additional Lead Information
- Lead Information
- Meeting Dates
- Room Summary
- History/Futures
- Notes
- Responses
- Room Data 
- Signage
- General

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 different 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 – RFP PICKUP (CONT'D)

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



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

OPPORTUNITIES – RFP PICKUP (CONT'D)

Peak Requested 25

Additional room requests/needs

SAVE

CANCEL

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
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.



FIND MORE TRAINING GUIDES UNDER “PARTNER BULLETINS”

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