VISIT OMAHA

PARTNER EXTRANET TRAINING GUIDE: RFPS, LEADS AND SERVICE REQUESTS

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LOGIN SCREEN

Omaha CVB - Extranet

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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 F	ilters					
Responded is:				Lead Name contains:								
			Ŧ									
Group Type is on	f:			Property Lead Status is c	one of:							
CHOOSE -				OPEN, OPEN/ BID SENT	•							
APPLY FILTERS	CLEAR FILTERS											
										Page 1 of 1	Go to Page: 1	6
										, rage I of I		
Actions	Lead ID	- Lead Nan	e Property Lea Status	d Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	\$
					No Rec	cords 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

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.

Filters (1) Responded is:		Lead Name coi	ntains:	Manage Filters				
Group Type is one CHOOSE +	e of:	Property Lead	Status is one of: BID SENT -					
APPLY FILTERS	CLEAR FILTERS							
							Page 1 of 1	Go to Page: 1
Actions	Lead ID Lead Nat	e Property Lead Create D Status	ate Grou ype	Lead Type Organ	nization Account	Response Date	Arrival (Preferred)	Departure (Preferred)
Actions	Lead ID Lead Nat	e Property Lead Create D Status	ate Grou ype	Lead Typ	e Orga	e Organization Account	e Organization Account Response Date	e Organization Account Response Date Arrival (Preferred)

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.

RETURN		crm@simpleviewinc.com 123.123.1234
Sections:	Meeting Requirements	See attached RFP for more details.
Lead Information	Schedule of Events	
Meeting Dates	Action Requested	
Additional Lead Information	Comments	
Room Summary	Competitive Sites	
History/Futures	Meeting Specs	2016-Annual-Convention-REP docx
Notes	incoding opeou	
Responses	Lost Business	
Signage	Code	
General	Lost Comments	
Room Data		

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.

Update Response

SAVE	Lead Information	
CANCEL	Section Collapsed, click header to expand.	
Sections: Lead Information Response Information Room Information File Attachments	Response Information Pursuing this lead: Required O NO O YES	Account: ⊲Required Simpleview Hotel and Conference Center ▼
	Comments: <pre> Required </pre>	

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.

Section

SAVE	Room Infor	mation							
CANCEL		Mon	Tue	Wed	Thu	Fri	Sat	Sun	
ctions:		02/01/2016	02/02/2016	02/03/2016	02/04/2016	02/05/2016	02/06/2016	02/07/2016	
Lead Information	Doubles	0	0	0	0	0			
Response Information Room Information	Multiple	0	0	0	0	0			
File Attachments	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.

SAVE	Total	0 0	0	0	0		
CANCEL	Requested	10 10	10	10	10		
ections:							
Response Information Room Information	File Attachn	nents					
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:			Responded is:			
CHOOSE +				*		
APPLY FILTERS						
-						
•						Page 1 of 1 9 Go to Page: 1 9
Actions	Lead Name	 Account 	Lead T	ype Response Due	Arrival	Departure 🔅
٠	Rita Writa	Visit Omaha	Test	03/02/2012	03/12/2012	03/16/2012

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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:	Responses							
Opportunity Information Responses	Simpleview Hotel and Conference Center							
Notes	Status Open							
General	Add/Edit	Add/Edit Room Request Dates Pursuing? Comments						
	1	09/10/2015 - 09/13/2015						
SAVE CANCEL	Response Info	rmation						
Sections:	Pursuing this lead:	Required	Account:	⊲Required				
Lead Information Response Information File Attachments	O YES Comments: ∢Requir	O NO	Simpl	eview Hotel and	Conference Center	•		

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) Status is one of:		Lead	contains:	🌣 Manage Filters				
CHOOSE -								
APPLY FILTERS								
						0	Page 1 of 4 👂 Go to Page: 1	•
Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees	٠
۲	Airport Transportation	Visit Omaha	Transportation	12/15/2011	12/07/2011	12/09/2011	1	
۲	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

RETURN		Attendees	1200	
		Deadline	08/12/2015	
Sections:		Budget	\$13,000	
Request Information Request Dates Contact Information Additional Notes and Documents Accounts/Responses		Location Description Additional Documents	To/From Hotel & Conve Need transportation sh • 2016-Annual-Co	vention Center nuttles for convention running all day from 7am to 7pm. onvention-RFP.docx
RETURN	Section	n Collapsed, cli	ck header to expand.	
Sections: Request Information	Additi	ional Note	s and Documents	
Request Dates Contact Information	File	Title	Category	Description
Additional Notes and Documents		RFP	Spec Sheet	See attached RFP for more details
Accounts/Responses	_			

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

OPPORTUNITIES – SERVICE REQUESTS

Accol	ints/Posponsos			Response for Simpleview Hotel and Conference Center	×
Accou	ints/ Responses			Pursuing:	
Actions	Company	Status	Respon		
	Simpleview Hotel and Conference Center	Open	No Res	Comments: <a>Required	
Gener	al				
Gener	or an				_/;

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)

Accour	nts/Responses		Bure	au-Only Comments:
Actions	Company	Chalum	The	se comments will not be seen by the nt. They will only be seen by bureau
Actions	Company	status	staff	f.
1	Simpleview Hotel and Conference Center	Open	No Respc	
				//
Genera	ıl			ATTACH A FILE
De	ecision Date			
Food	/ Beverage		Ν	lo files have been attached
Mi	sc. Expense			
	Category			
Econo	mic Value -			
	Lauren Test			

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) Responded is:			T	Lead Name contains:			🌣 Manag	ge Filters
Group Type is of CHOOSE -	ne of:			Property Lead Status is o CLOSED/ WON -	one of:			
APPLY FILTERS	CLEAR FILTERS			Closed/ No Bid Sent Open Open/ Bid Sent Turned Down				
				Closed/ Decision Per Closed/ Lost to Anot Closed/ Cancelled	nding her City			
Actions	Lead ID	Lead Name	Property Lead Status	Closed/(Wone Closed/ Won - Prope	Grove Ty rties TBD	pe	Lead Type	Organ
۲	7035	AMERICAN CLASSIC TOURS	Closed/ Won	Closed/ Lost 05/11/2012 Assist	Tour			Graysla Classic

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.

Actions	Lead ID 🗸	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	٥
۲	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		lowa State Savings Bank	Visit Omaha		09/19/2007	09/20/2007	

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

	Lead ID	10058
RETURN	Meeting Name	Karate for Kids Meeting 2015
Sections:	Account	Hilton by the Shore
Additional Lead Information	Profile	Karate Affiliation
Lead Information	Organization	Karate for Kids
Meeting Dates	Organization	4956 N Park Ln
Room Summary	Address	Bonham TX 75418
History/Futures	Contact	Rita Duncan
Notes		4956 N Park Ln
Responses		Bonham TX 75418
Room Data		United States
Signage		520-424-1020 (Ext. 680)
General		rouncan@karaterorkids.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.

Room Data						
		Booked Roo	oms by Days (Dut		
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.

	Peak Reques	alea 25							
SAVE	Additional ro	om							
CANCEL	requests/ne	eds							
ons:									
ad Information om Summary	Pickup Roor	ns							
ckup Rooms	Pickup Rooms:			Pic	Pickup Avg. Daily Room Rate:				
	0			s	\$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					

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.

VISIT OMAHA

FIND MORE TRAINING GUIDES UNDER "PARTNER BULLETINS"

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