



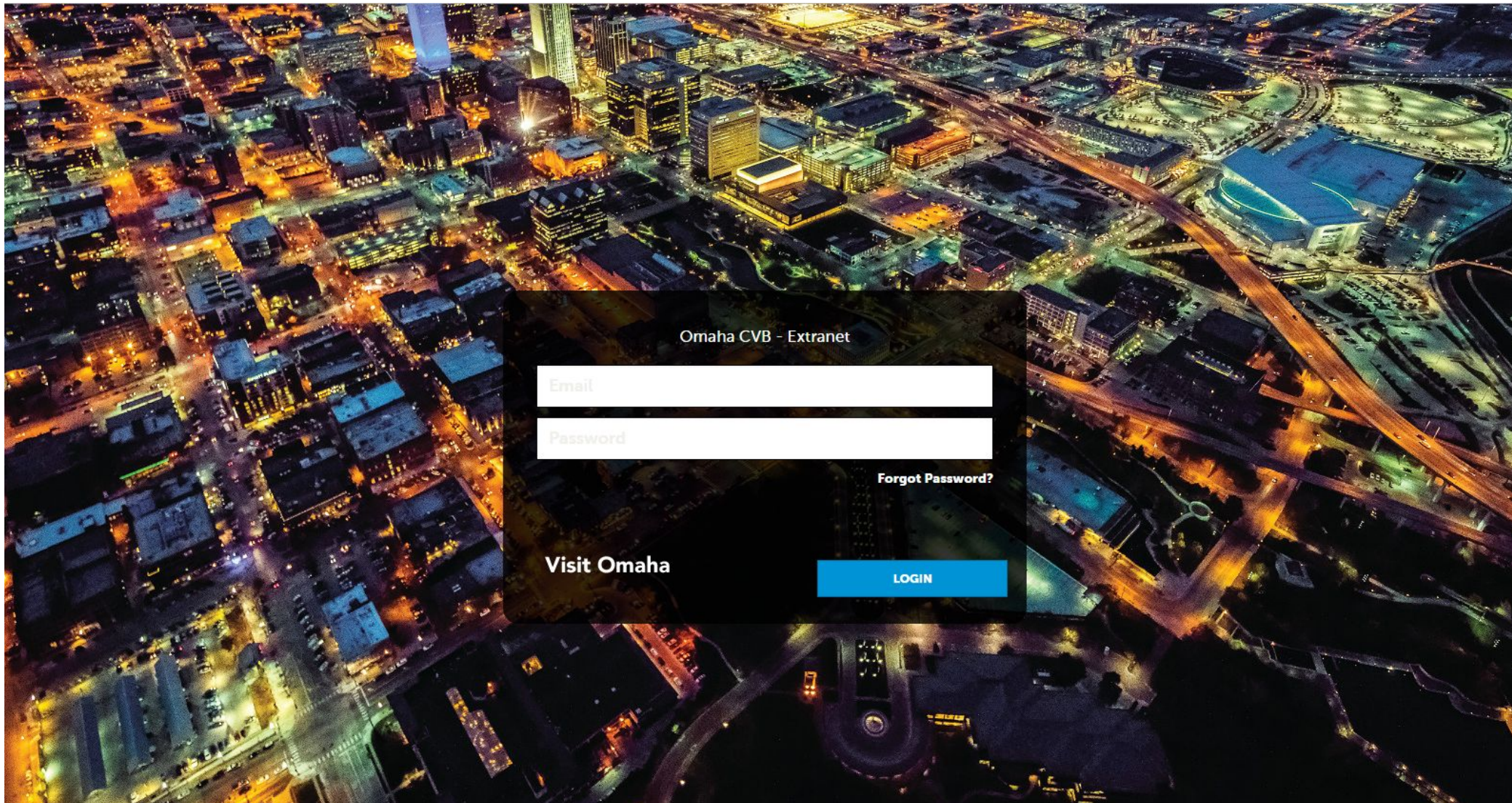
PARTNER EXTRANET TRAINING GUIDE: RFPS, LEADS AND SERVICE REQUESTS

Questions, Comments, Concerns

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Opportunities
Manage your Opportunities

- RFPs
- Media Leads
- Service Requests

Listings See Details Views

| Month | Count |
|-------|-------|
| Jun | 25 |
| Jul | 41 |
| Aug | 37 |
| Sep | 11 |
| Oct | 22 |
| Nov | 36 |
| Dec | 13 |
| Jan | 13 |
| Feb | 7 |
| Mar | 17 |
| Apr | 13 |
| May | 8 |

Offers See Details

| Month | Count |
|-------|-------|
| Jun | 0 |
| Jul | 0 |
| Aug | 0 |
| Sep | 0 |
| Oct | 0 |
| Nov | 10 |
| 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. The menu items are: 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 'Meeting Requirements' section with the text 'See attached RFP for more details.' and a red arrow pointing left. Further down is a 'Meeting Specs' section with a blue hyperlink '2016-Annual-Convention-RFP.docx' and a red arrow pointing left. Other sections include 'Schedule of Events', 'Action Requested', 'Comments', 'Competitive Sites', 'Lost Business Code', and 'Lost Comments'.

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)

The screenshot displays a web interface for responding to RFPS. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below them is a 'Sections:' menu with four options: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'SAVE' button to the right, and another red arrow points from 'File Attachments' to the right. The main content area is divided into two sections. The top section is a 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 right. Below this is a 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—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 | |

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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:

- 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, a sidebar contains a 'RETURN' button and a list of sections: Request Information, Request Dates, Contact Information, Additional Notes and Documents, and Accounts/Responses. The main content area shows details for a service request, including Attendees (1200), Deadline (08/12/2015), Budget (\$13,000), Location (To/From Hotel & Convention Center), and Description (Need transportation shuttles for convention running all day from 7am to 7pm.). Under Additional Documents, there is a link to '2016-Annual-Convention-RFP.docx'. Below this, a section is collapsed with the text 'Section Collapsed, click header to expand.'. The expanded section is titled 'Additional Notes and Documents' and contains a table with columns: File, Title, Category, and Description. The table has one row with a file icon, 'RFP', 'Spec Sheet', and 'See attached RFP for more details'. Red arrows point from the 'Request Information' section in the sidebar to the 'Request Information' section in the main content, from the 'Additional Notes and Documents' section in the sidebar to the expanded section, and from the '2016-Annual-Convention-RFP.docx' link to the document title in the table.

RETURN

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

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](#)

Section Collapsed, click header to expand.

RETURN

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

Additional Notes and Documents

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

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" row. 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". At the bottom of the modal 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 displays a web interface for managing service requests. On the left, a table titled "Accounts/Responses" shows a single entry for "Simpleview Hotel and Conference Center" with a status of "Open" and "No Response". Below this is a "General" section with various fields like "Decision Date", "Food / Beverage", "Misc. Expense", "Category", and "Economic Value - Lauren Test". On the right, there is a "Bureau-Only Comments" section with a text area and an "ATTACH A FILE" button. Below the comments 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 Response |

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

The screenshot shows a filter interface for RFPs. It includes a 'Filters (1)' section with a 'Manage Filters' link. The filters are:

- Responded is: (empty dropdown)
- Lead Name contains: (empty text input)
- Group Type is one of: (CHOOSE dropdown)
- Property Lead Status is one of: (CLOSED/ WON dropdown menu)

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** (highlighted)
- Closed/ Won - Properties TBD
- Closed/ Lost 05/11/2012 Assist


At the bottom, there are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons. Below the filters is a table with the following data:



| Actions | Lead ID | Lead Name | Property Lead Status | Group Type | Lead Type | Organiz |
|---------|---------|------------------------|----------------------|------------|-----------|--------------------|
| | 7035 | AMERICAN CLASSIC TOURS | 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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