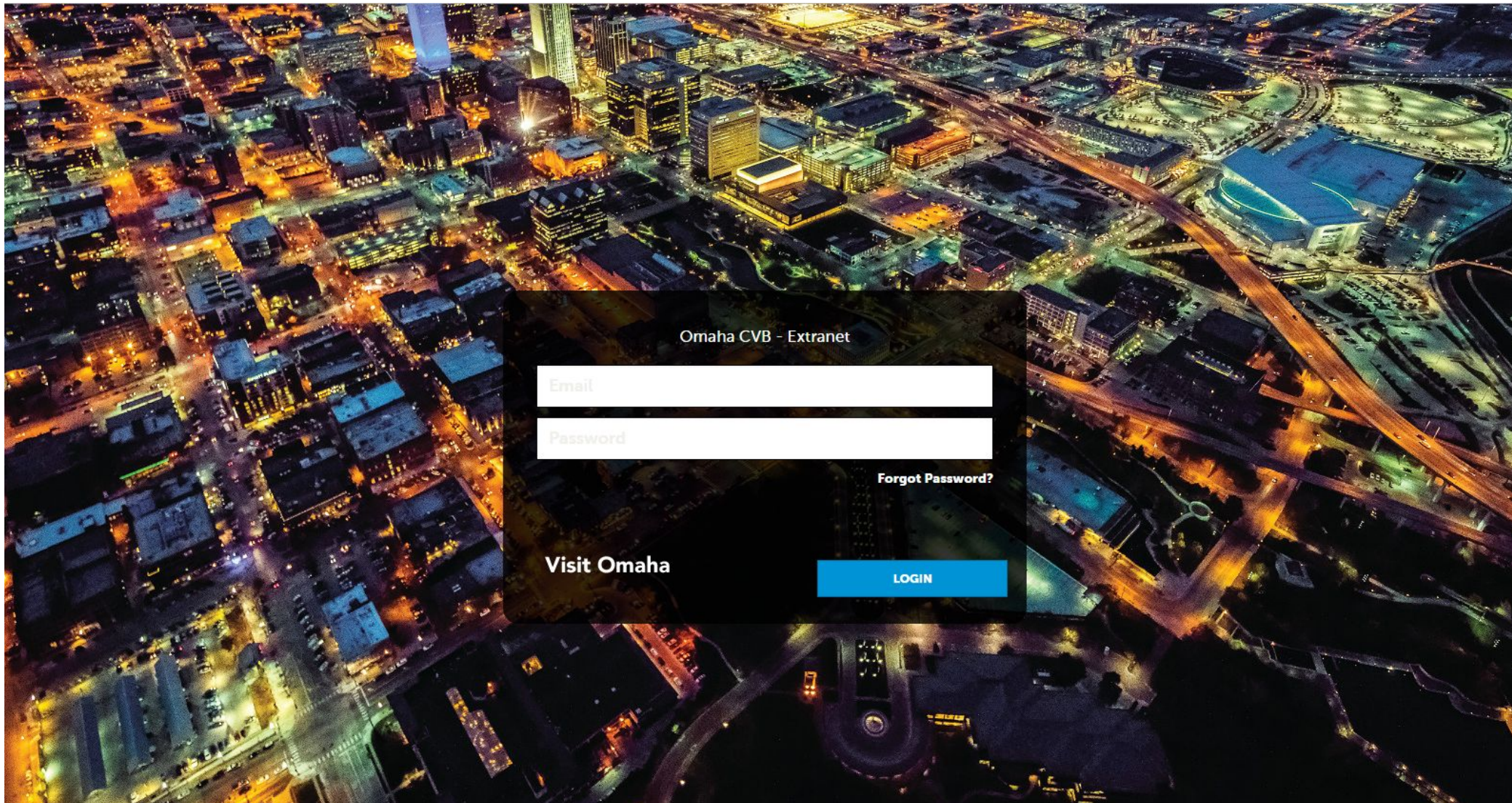# PARTNER EXTRANET TRAINING GUIDE: RFPS, LEADS AND SERVICE REQUESTS

Questions, Comments, Concerns
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LOGIN SCREEN

HOME SCREEN

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

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

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)

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)

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)

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)

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

Page 1 of 1 ❯ Go to Page: [1] ❯

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)

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:

CHOOSE ▾

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

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

OPPORTUNITIES – SERVICE REQUESTS

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)

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

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)

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)

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

OPPORTUNITIES – RFP PICKUP (CONT'D)

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.

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FIND MORE TRAINING GUIDES UNDER "PARTNER BULLETINS"

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