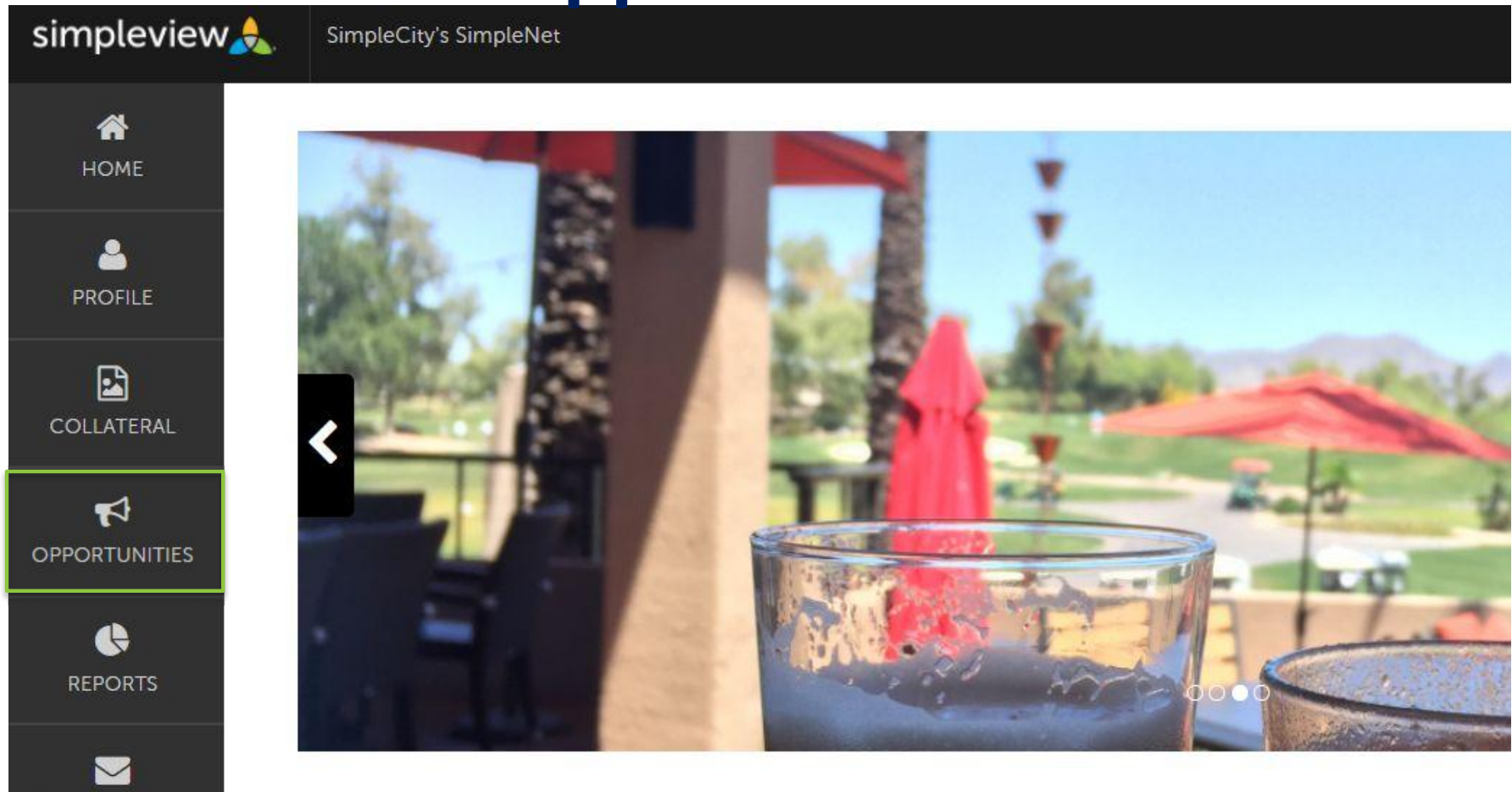


Opportunities

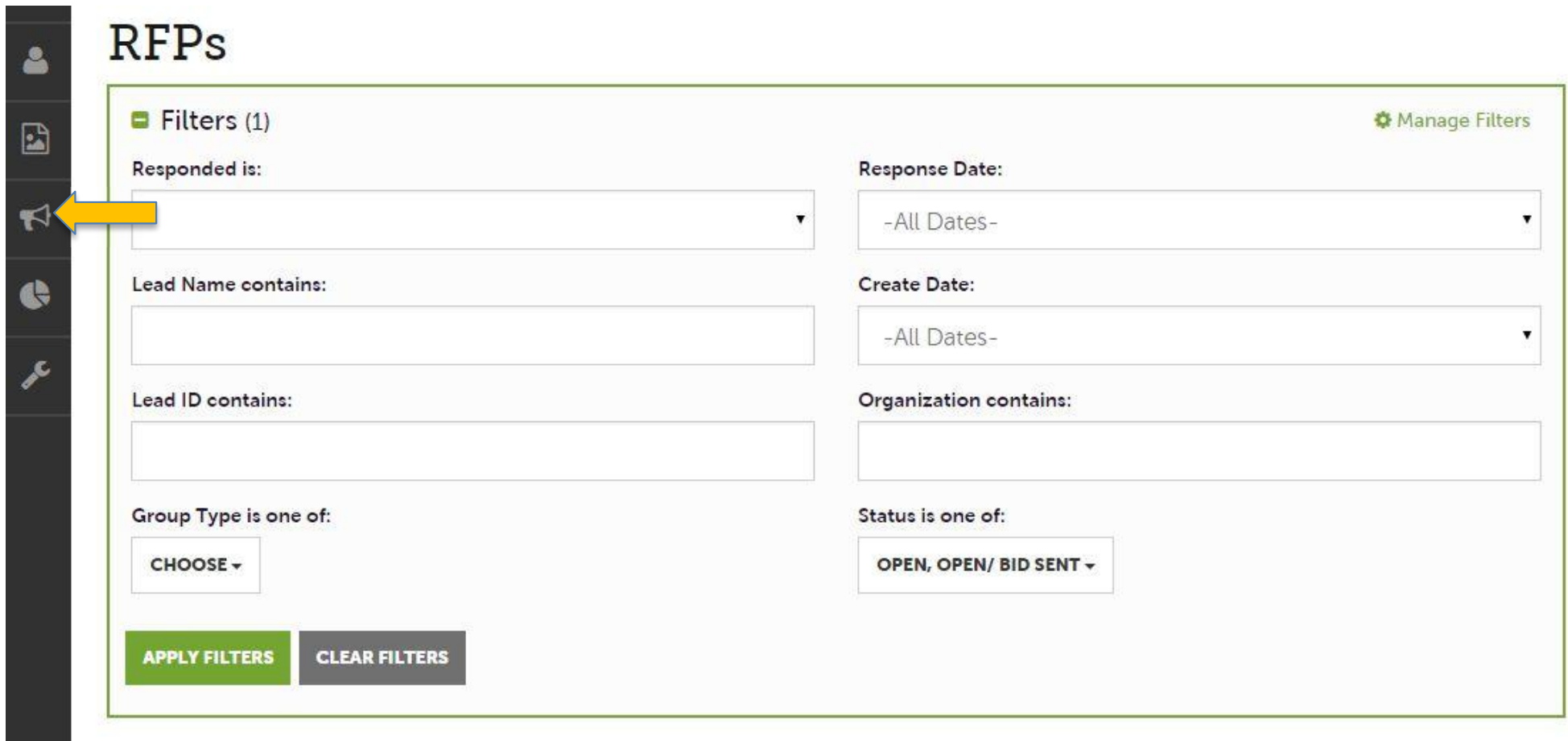


Clicking the **Opportunities** icon, displays options for RFPs sent by the Bureau. Opportunities are broken into RFPs and Service Requests (non-room specific RFPs).

More on these options later in the presentation.



Opportunities – RFPs



The screenshot shows a web application interface for managing RFPs. On the left is a dark sidebar with five icons: a person, a document, a megaphone (highlighted with a yellow arrow), a pie chart, and a wrench. The main content area is titled 'RFPs' and contains a filter grid. The grid has a header 'Filters (1)' and a 'Manage Filters' link. The filters are arranged in two columns. The left column includes 'Responded is:' (a dropdown menu), 'Lead Name contains:' (a text input), 'Lead ID contains:' (a text input), and 'Group Type is one of:' (a dropdown menu with 'CHOOSE' selected). The right column includes 'Response Date:' (a dropdown menu with '-All Dates-' selected), 'Create Date:' (a dropdown menu with '-All Dates-' selected), 'Organization contains:' (a text input), and 'Status is one of:' (a dropdown menu with 'OPEN, OPEN/ BID SENT' selected). At the bottom of the grid are two buttons: 'APPLY FILTERS' (green) and 'CLEAR FILTERS' (grey).

Filters (1) Manage Filters	
Responded is:	Response Date:
<input type="text"/>	<input type="text" value="-All Dates-"/>
Lead Name contains:	Create Date:
<input type="text"/>	<input type="text" value="-All Dates-"/>
Lead ID contains:	Organization contains:
<input type="text"/>	<input type="text"/>
Group Type is one of:	Status is one of:
<input type="text" value="CHOOSE"/>	<input type="text" value="OPEN, OPEN/ BID SENT"/>
<input type="button" value="APPLY FILTERS"/> <input type="button" value="CLEAR FILTERS"/>	

After you click the RFP icon and then RFPs, you will be presented with your property's Sales 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 Opens Leads you have already bid on. For more on Lead statuses and their definitions see the next slide.



Opportunities – RFPs

LEAD STATUS DEFINITIONS




On the Partner Portal 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)

Page 1 of 1 Go to Page: 1

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	
 	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. As mentioned in the Filters and Data Grid section of this presentation, 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. 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)

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. For the Notes section, see next slide.



Opportunities – 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 or Pencil icon to enter/edit your response.



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 the Bureau 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 an RFP. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' list with four items: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. An orange arrow points from the 'SAVE' button to the top of the main content area. Another orange arrow points from 'File Attachments' in the list to the 'File Attachments' section header. The 'File Attachments' section has a header 'File Attachments' and a blue 'ATTACH FILE' button. To the right of the button is the text 'or drag files to the page', with an orange arrow pointing to it. Below this is a light grey box containing the text 'No files have been attached'. At the top of the main content area, there is a table with two rows and six columns.

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

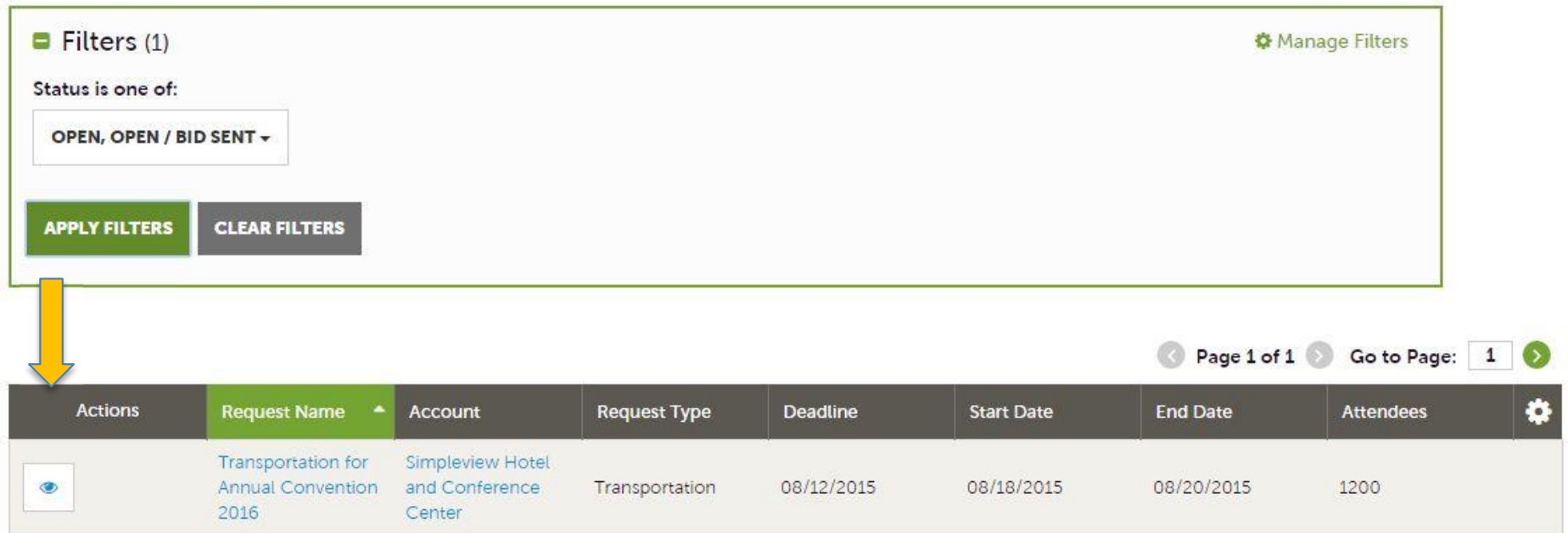
To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section.

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



Opportunities – Service Requests

Service Requests




Filters (1) [Manage Filters](#)

Status is one of:

OPEN, OPEN / BID SENT ▾

APPLY FILTERS **CLEAR FILTERS**

Page 1 of 1 Go to Page: 1

Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees	
	Transportation for Annual Convention 2016	Simpleview Hotel and Conference Center	Transportation	08/12/2015	08/18/2015	08/20/2015	1200	

By clicking the RFP icon and then selecting Service Requests, you can view non-room night specific Leads sent to your property. 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

Sections:

[Request Information](#)
[Request Dates](#)
[Contact Information](#)
[Additional Notes and Documents](#)
[Accounts/Responses](#)

Attendees1200

Deadline08/12/2015

Budget\$13,000

LocationTo/From Hotel & Convention Center

DescriptionNeed 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 detailed information in the Request information section along with RFP attachment downloads.
Depending upon the Bureau's preferences, this information may be contained in the Additional Notes and Documents section of the Service Request.



Opportunities – Service Requests

Accounts/Responses

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

General

Response for Simpleview Hotel and Conference Center

Pursuing: Required

☐ YES ☐ NO

Comments: Required

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 the Bureau 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

The screenshot displays a web application interface for managing service requests. On the left, under the 'Accounts/Responses' header, there is a table with the following data:

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

Below the table, the 'General' section contains several input fields: 'Decision Date', 'Food / Beverage', 'Misc. Expense', 'Category', and 'Economic Value - Lauren Test'.

On the right side of the interface, there is a 'Bureau-Only Comments' section with a text area for comments. Below this is a yellow arrow pointing to a blue 'ATTACH A FILE' button. Underneath the button is a light gray box stating 'No files have been attached'. At the bottom right, another yellow arrow points to a blue 'UPDATE' button, which is next to a white 'CANCEL' button.

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.

This is not a responsibility for non-hotel partners.



RFPs

Opportunities – RFP Pickup (cont'd)

The screenshot shows a 'Filters (1)' panel with a 'Manage Filters' link. It contains several filter categories: 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', 'Group Type is one of:', 'Response Date:', 'Create Date:', 'Organization contains:', and 'Property Lead Status is one of:'. The 'Group Type is one of:' dropdown is highlighted with an orange arrow pointing to its 'CHOOSE' button. The 'Property Lead Status is one of:' dropdown is also highlighted with an orange arrow pointing to the 'Closed/ Won' option, which is selected and marked with a checkmark. At the bottom of the filter panel are 'APPLY FILTERS' and 'CLEAR FILTERS' buttons.

Filters (1) Manage Filters

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of: CHOOSE

Response Date:

Create Date:

Organization contains:

Property Lead Status is one of: 3 SELECTED



- 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

APPLY FILTERS CLEAR FILTERS

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)	
	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 – 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						
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 – RFP Pickup (cont'd)

SAVE

CANCEL

Sections:

Lead Information

Room Summary

Pickup Rooms

Peak Requested 23

Additional room requests/needs

Pickup Rooms

Pickup Rooms:

0

Pickup Avg. Daily Room Rate:

\$ \$0.00

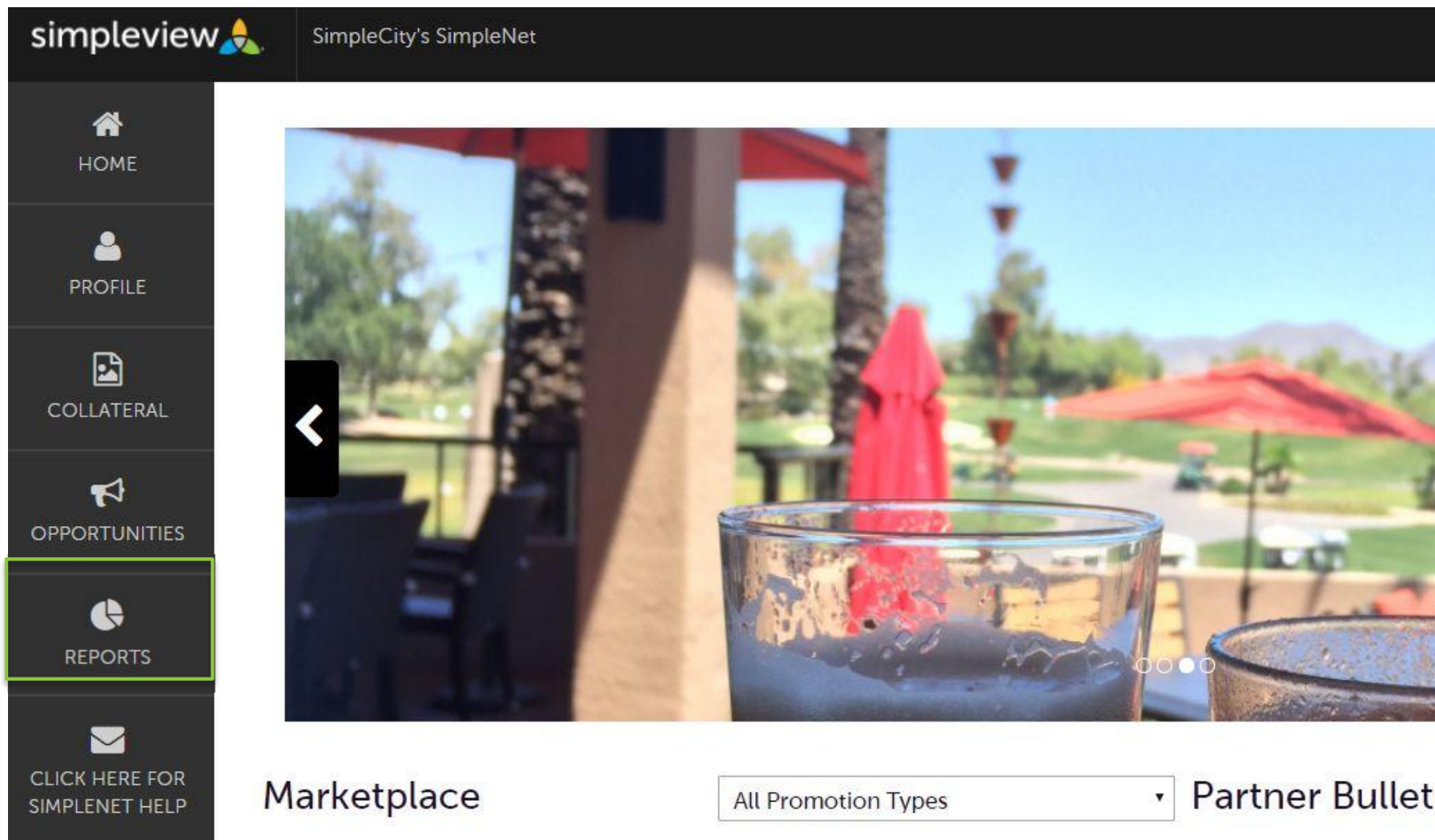
Sun	Mon	Tue	Wed	Thu	Fri	Sat
12/20/2015	12/21/2015	12/22/2015	12/23/2015	12/24/2015	12/25/2015	12/26/2015
0	0	0	0			

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.



Reports




The screenshot displays the Simpleview web application interface. At the top, the header includes the 'simpleview' logo and the text 'SimpleCity's SimpleNet'. A vertical sidebar on the left contains navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS (highlighted with a green border), and a link to 'CLICK HERE FOR SIMPLENET HELP'. The main content area features a large image of a glass of water on a patio with red umbrellas in the background. Below the image, the word 'Marketplace' is visible, followed by a dropdown menu set to 'All Promotion Types' and the text 'Partner Bulletin'.

Clicking the **Reports** icon displays reports the Bureau has posted. This may or may not be made available to you. If reports are made available, you can simply click the name of the report to view it.



Help!

simpleview

SimpleCity's SimpleNet


HOME


PROFILE


COLLATERAL

OPPORTUNITIES

REPORTS


CLICK HERE FOR
SIMPLENET HELP





Marketplace

All Promotion Types ▾

Partner Bulletin

Clicking the **Help** icon will bring up an email that allows you to contact the Bureau.

