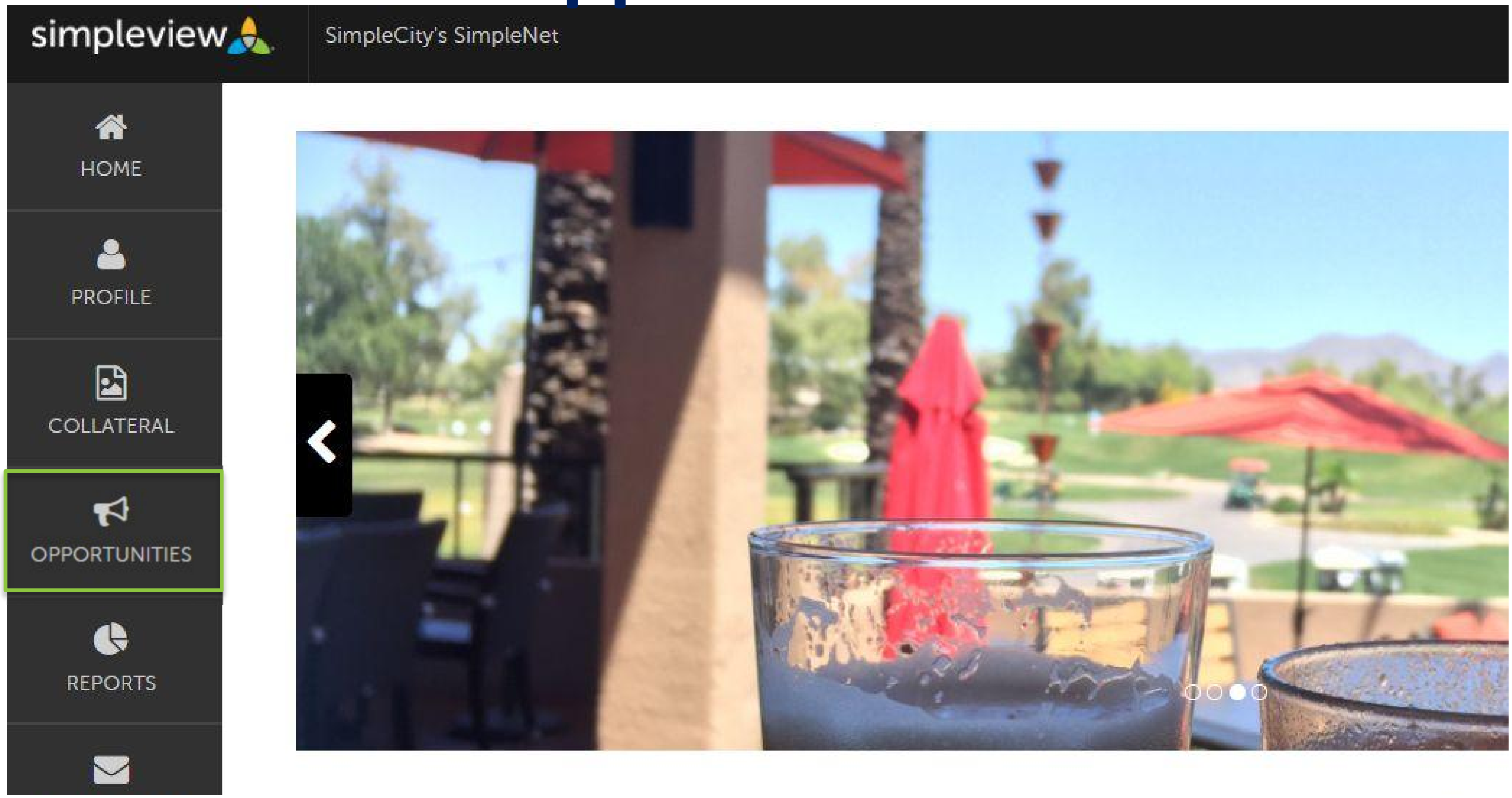
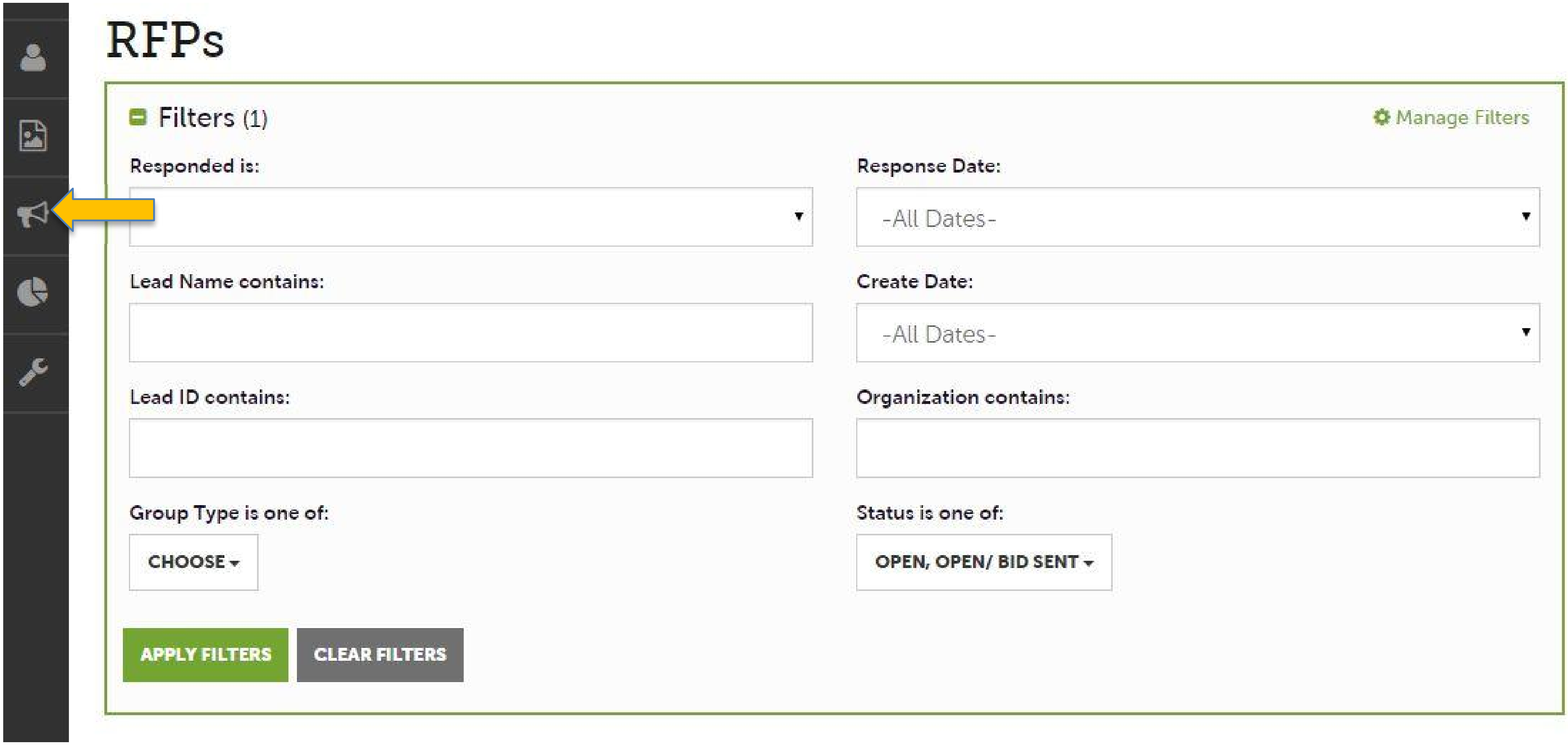
Opportunities



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



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)

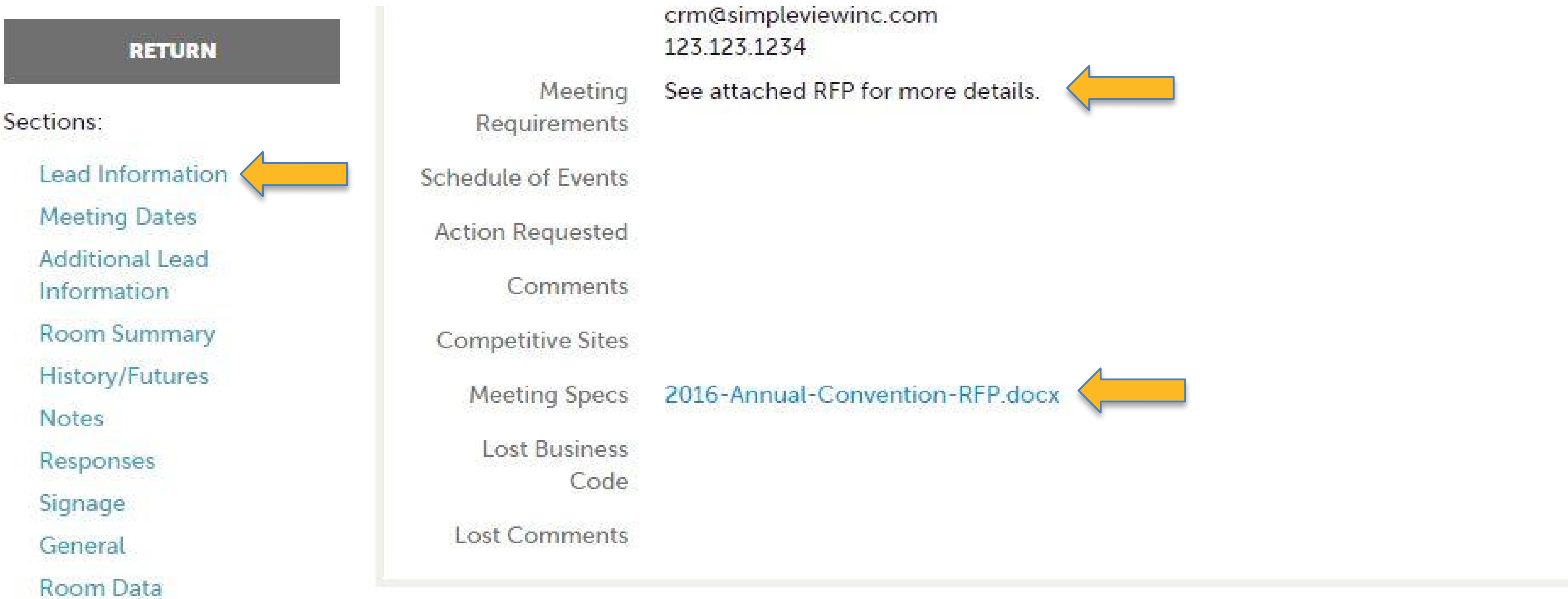
Page 1 of 1 Go to Page: 1

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.

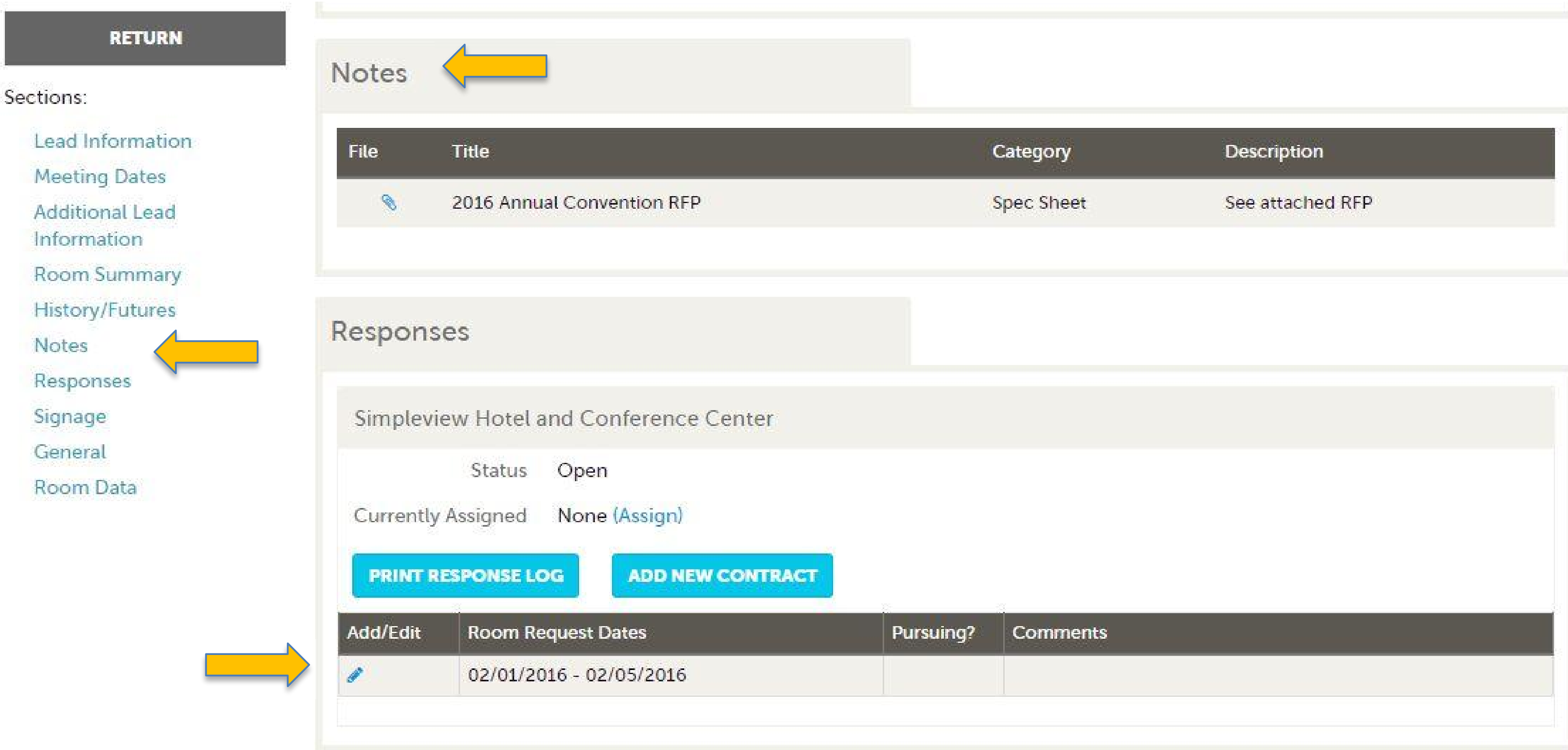
To view a Lead, click on the Eyeball icon or the Lead Name

Opportunities – RFPs (cont'd)



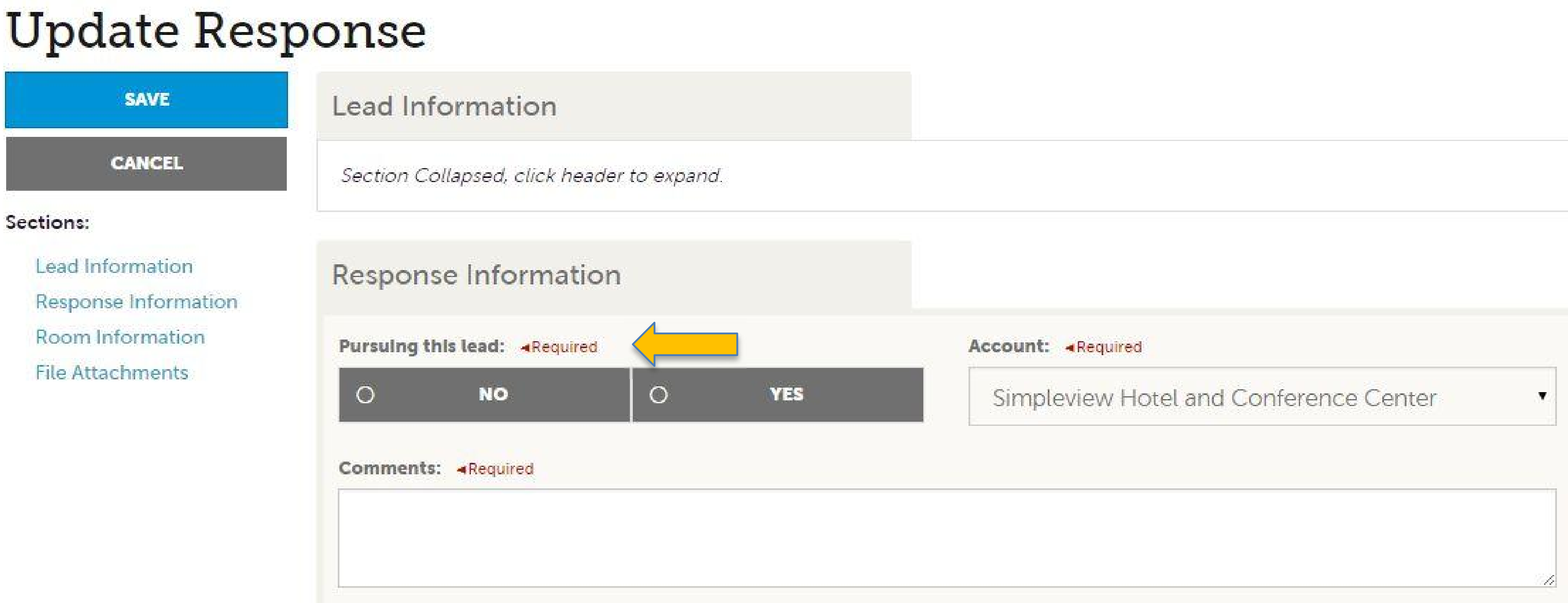
When viewing the Lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the Lead, these can generally be found in one of two areas: Lead Information and/or Notes section. In the above graphic, this is the Lead section; attachments will be found in the Meeting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

Opportunities – RFPs (cont'd)



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)

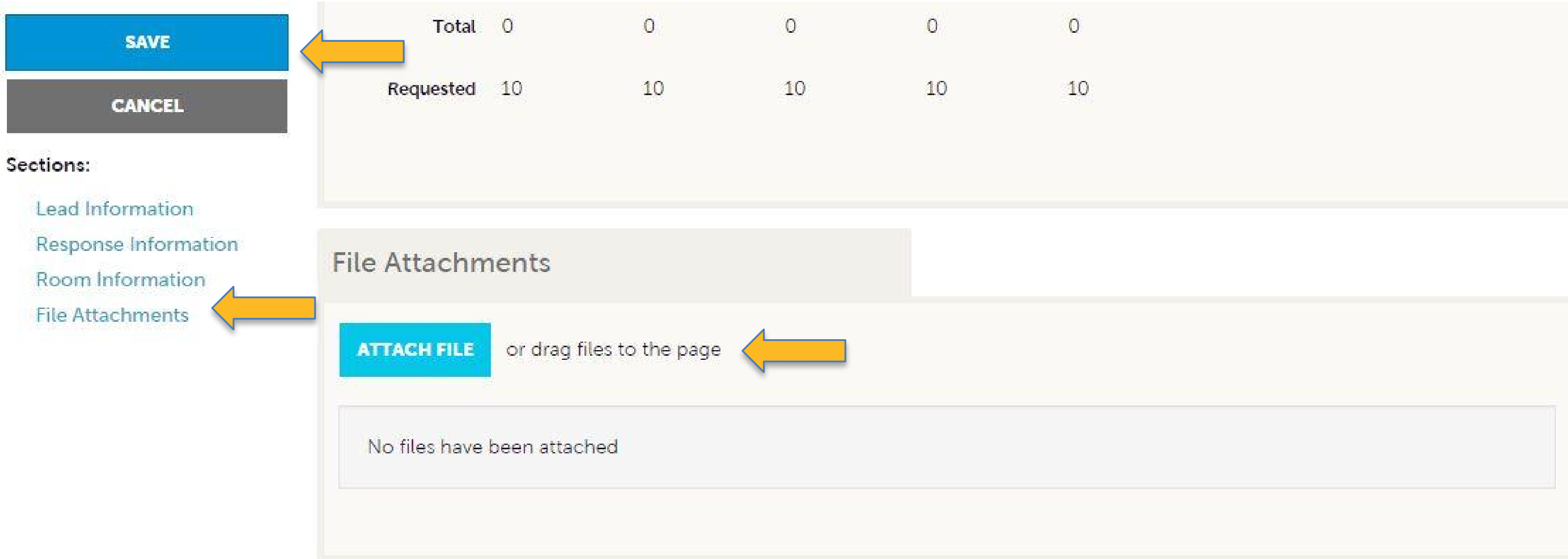


When adding/editing your response, you will need to tell the Bureau if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option

Opportunities – RFPs (cont’d)

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.

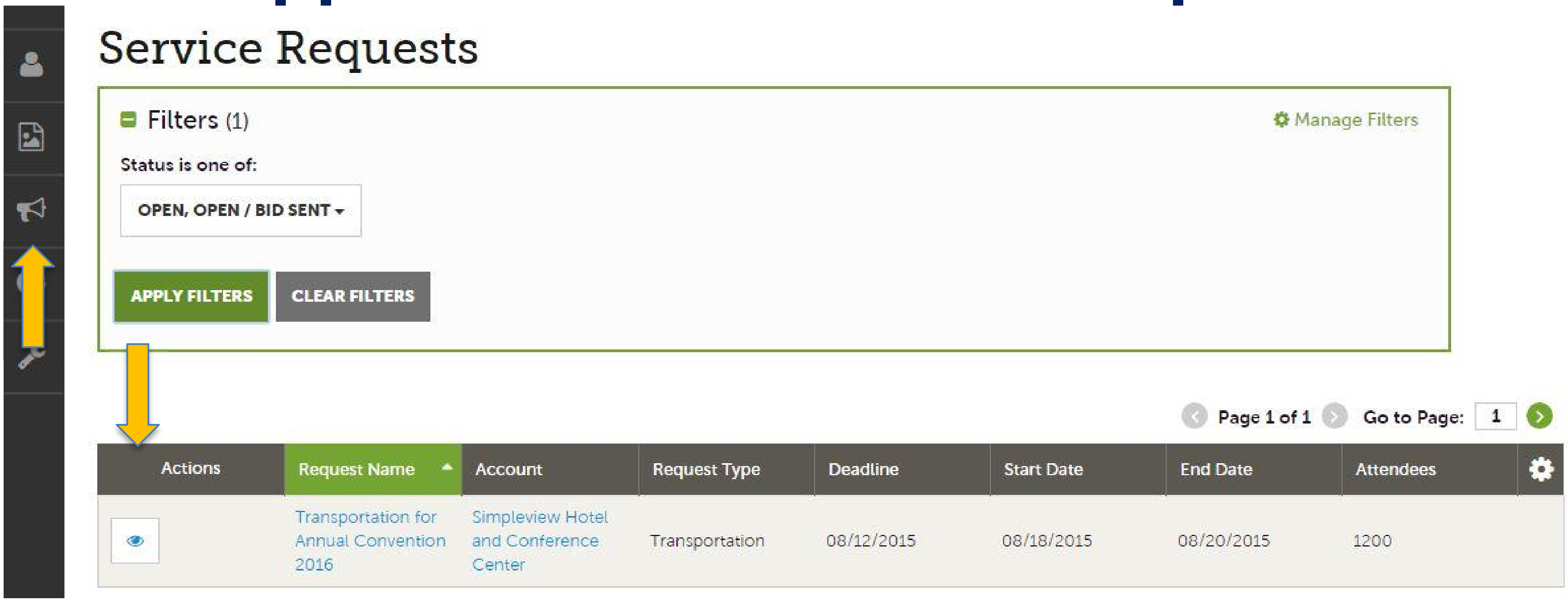
Opportunities – RFPs (cont'd)



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!

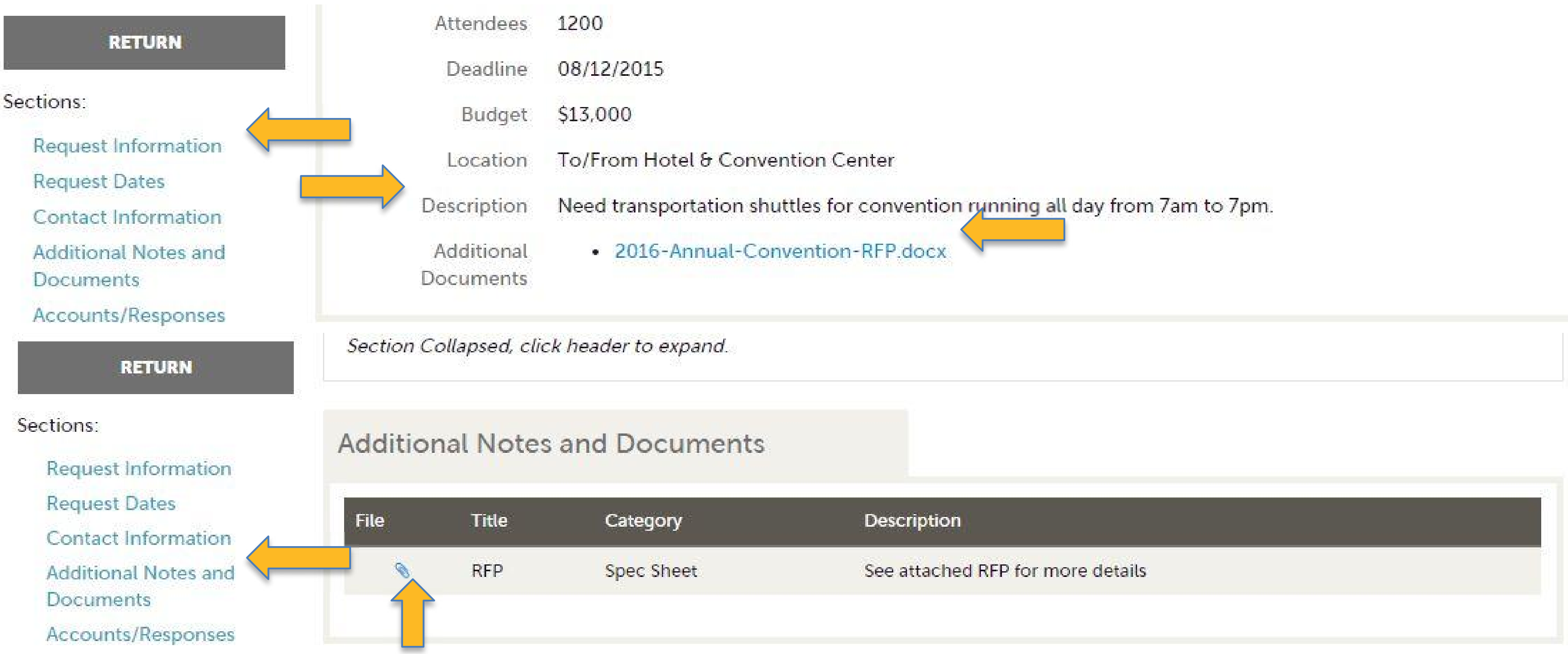
Opportunities – Service Requests



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…

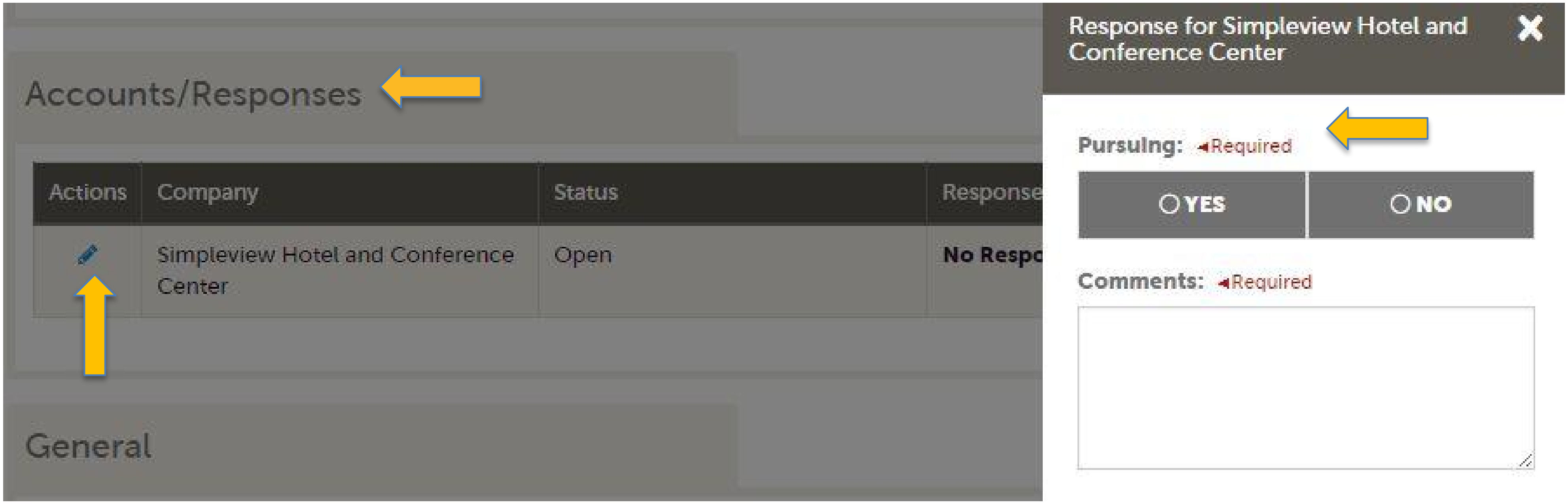
Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about the service request or click the name of the request.

Opportunities – Service Requests



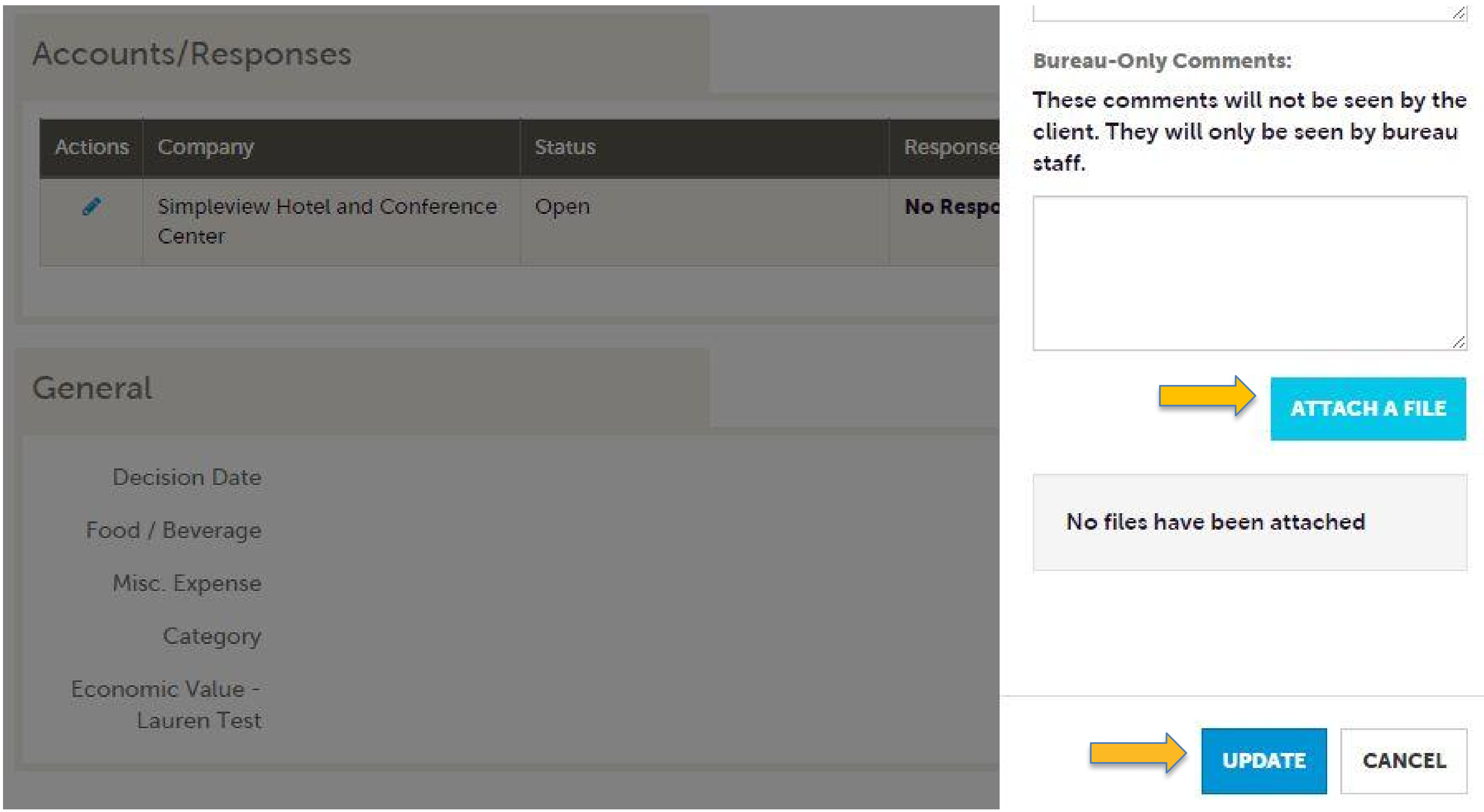
When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads.
Depending upon the Bureau's preferences, this information may be contained in the Additional Notes and Documents section of the Service Request.

Opportunities – Service Requests



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



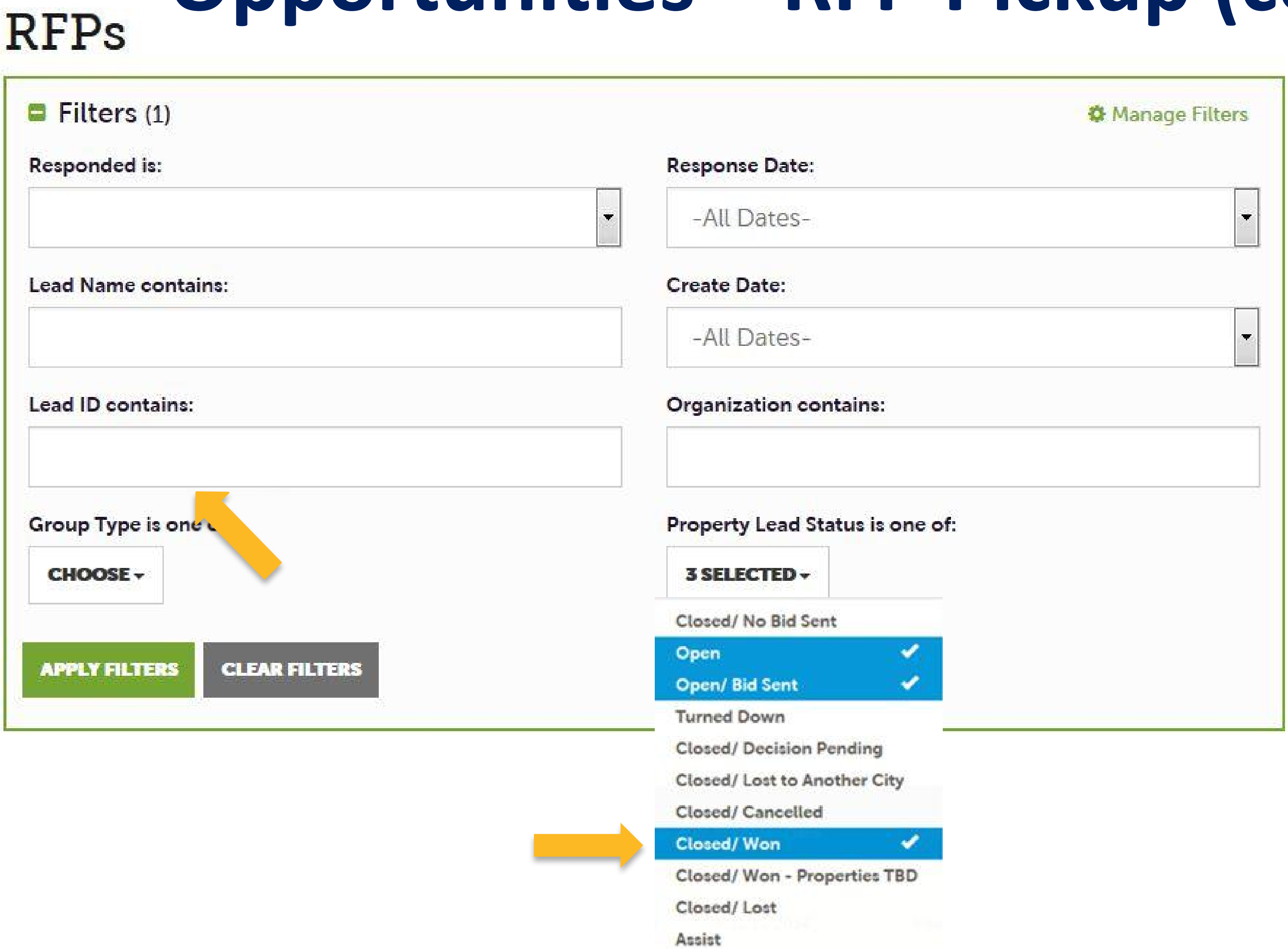
As you scroll down the response page on the right, you have the ability to attach proposals by clicking Attach File button or click and drag the file from your computer. Be sure to scroll to the button and click the Update button to save your changes!

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.

Opportunities – RFP Pickup (cont'd)



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	Simpletimez 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 Address	4956 N Park Ln 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 difference 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.

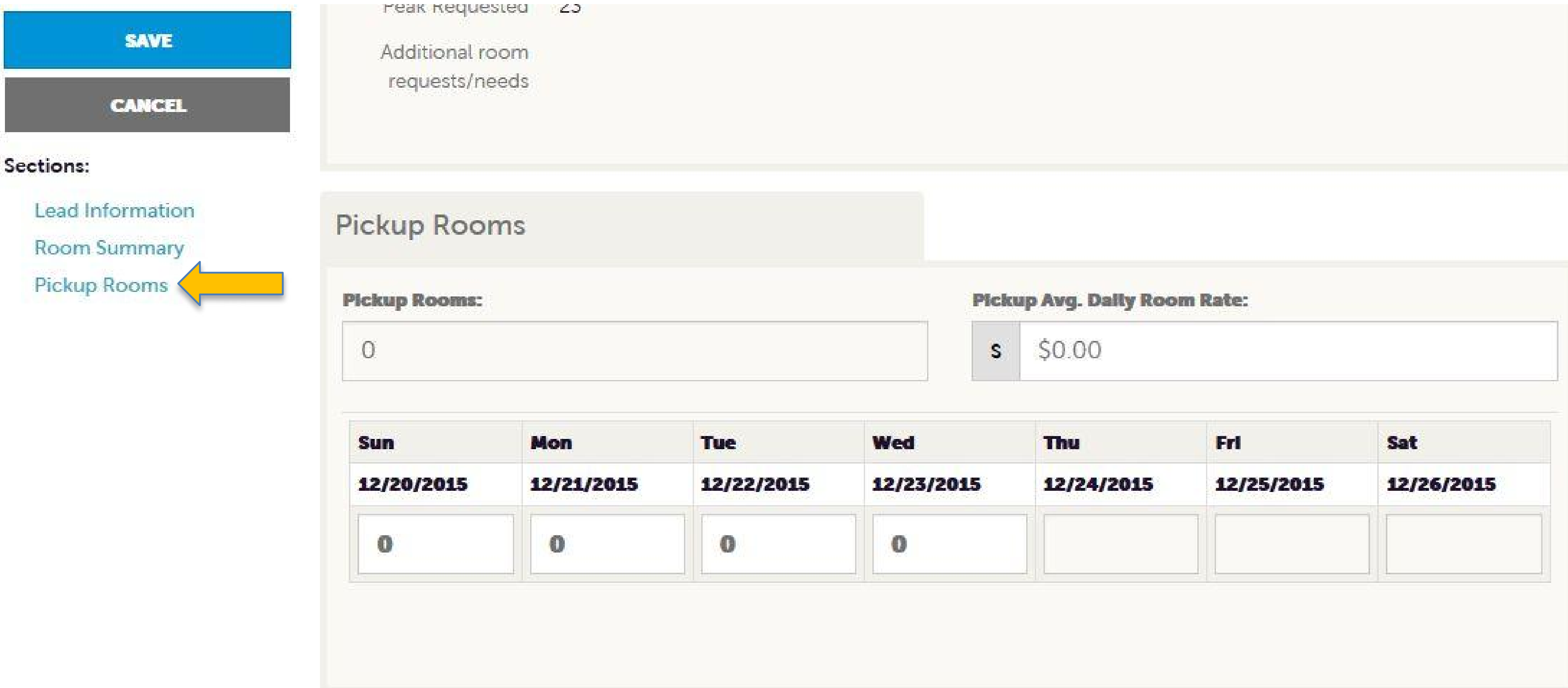
Opportunities – RFP Pickup (cont’d)

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.

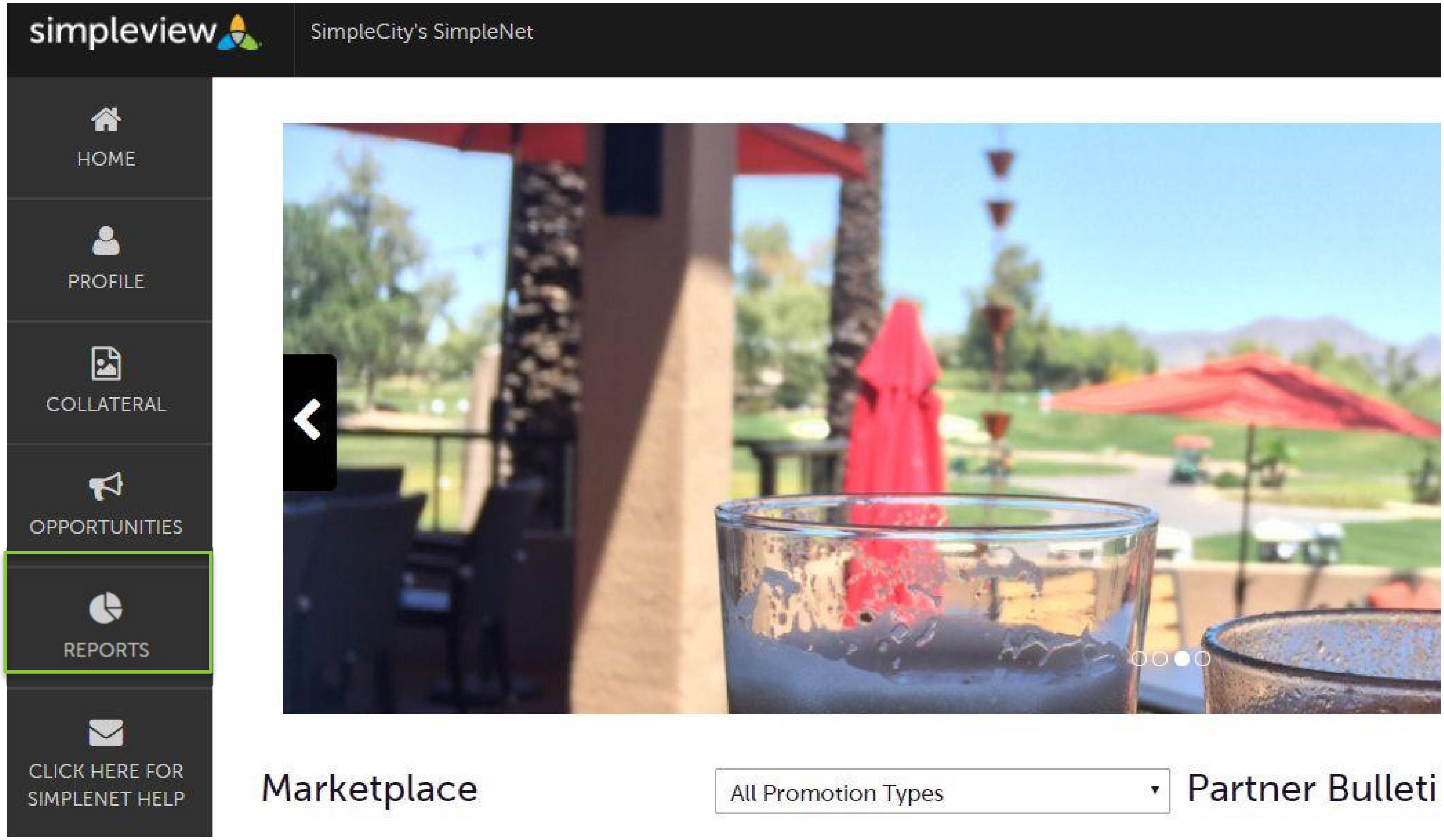
Opportunities – RFP Pickup (cont’d)



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.

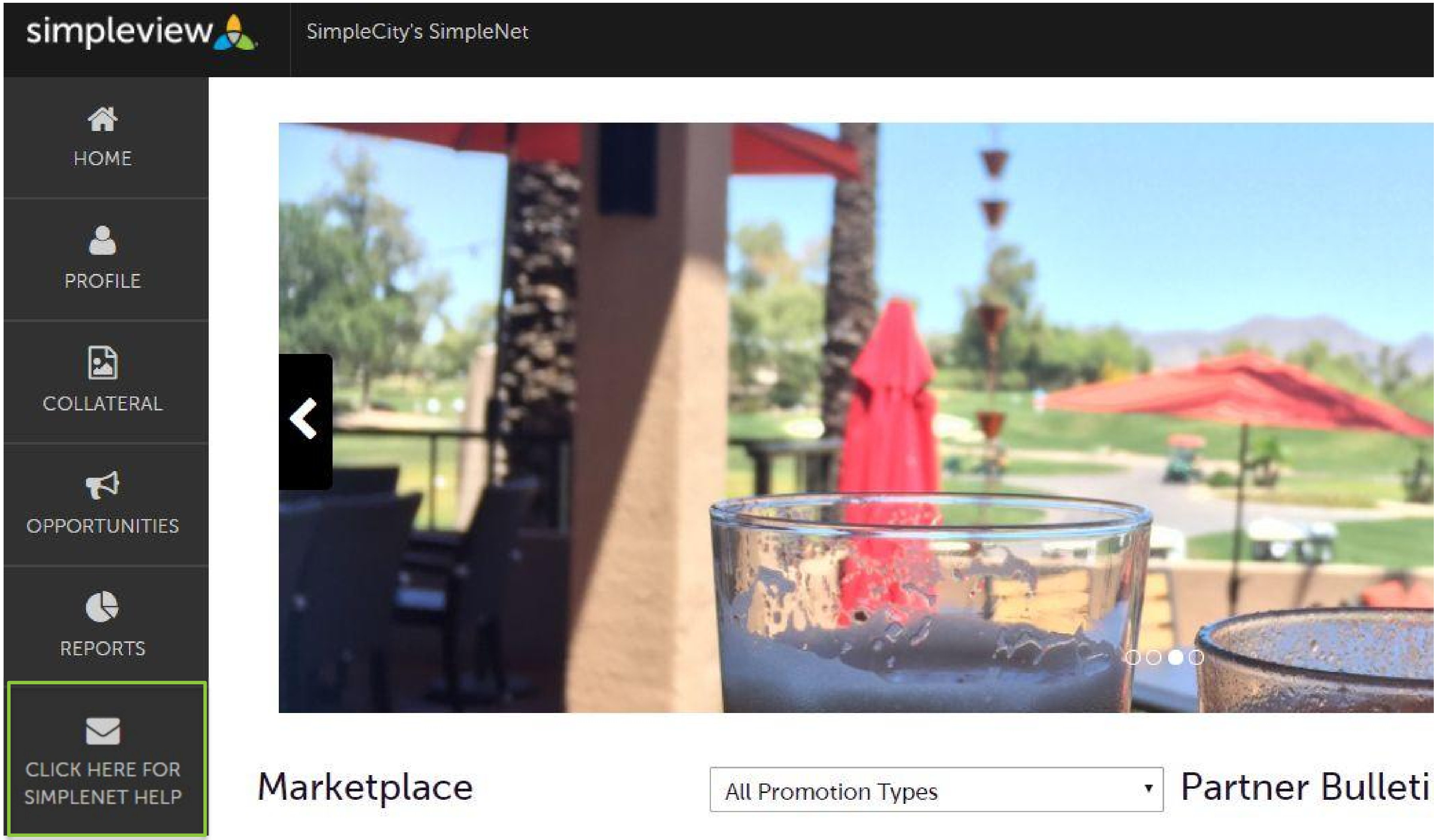
Be sure to click the Save after you have supplied the appropriate room information.

Reports



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!



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