



What is the Sales Lead Catcher feature?

Key points:

- Who do you want the sales lead catchers to be?
- Without having a lead catcher assigned on property, no one will be able to see Meeting Sales/Sports leads in the Partner Portal when logging in.
- If leads have not yet been assigned by the lead catcher, ONLY lead catchers will be able to see all leads.
- Once sales lead catchers have assigned leads to the corresponding sales manager, ONLY the lead catcher can see ALL leads. Everyone else will only see the leads specifically assigned to them.
- There could be a separate lead catcher for Tour & Travel (should the hotel choose so, however process is the same).
- When leads are assigned on the Partner Portal, a notification will be sent to the assignee automatically.

Partner Portal View

Partner Portal > Opportunities:

Depending on the role of the person logging in, they will see different things here. The majority of this will look the same with the exception of the new assigned contact field. The biggest difference here will be between the Lead Catchers and the Assigned Contacts. Lead Catchers will see ALL leads, whereas Assigned Contacts will only see the leads assigned to them as you can see below.

Lead Catcher View

Actions	Group Type	Lead ID	Lead Name	Organization	Response Date	Arrival (Preferred)	Departure (Preferred)	Property Lead Status	Responded	Create Date	Assigned Contact
	Meeting	17330	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/01/2042	12/01/2043	12/03/2043	Open	No	07/20/2016	

Assigned Contact

Actions	Group Type	Lead ID	Lead Name	Organization	Response Date	Arrival (Preferred)	Departure (Preferred)	Property Lead Status	Responded	Create Date	Assigned Contact
	Meeting	17330	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/01/2042	12/01/2043	12/03/2043	Open	No	07/20/2016	Andrea Timbes, CTA, CNSA

Partner Portal > Opportunities > Lead Detail:

The lead form will have an updated section called "Reponses". Here will be a button where the Lead Catcher can reassign the lead to any active contact at the property who has both Partner Portal & Lead access. The Assigned Contact can also see the "contact" section, however will not have access to the change contact button as you can see below.

Lead Catcher

Lead Details


PRINT
RETURN

- Sections:
- Responses
 - Lead Information
 - Meeting Dates
 - Room Summary
 - History/Futures
 - Decision Details
 - Meeting Space

Responses

FWCVB

Status Open

Currently Assigned None (Assign) 

PRINT RESPONSE LOG

Actions	Meeting Dates	Room Request Dates
+	12/01/2043 - 12/03/2043	12/01/2043 - 12/02/2043

Assign Contact

Search for Contact:

Search by Name

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- Paola Bowman, CTA
- John Cychol, FCDME, CTA
- Nannette Eiland
- Stephanie Garcia
- Jake Sillavan
- Robyn Temple
- Andrea Timbes, CTA, CNSA

Simpleview, Inc.

- Robyn Temple

SAVE **UNASSIGN** **CLOSE**

Assigned Contact

RETURN

- Sections:
- Responses
 - Lead Information
 - Meeting Dates
 - Room Summary
 - History/Futures
 - Decision Details
 - Meeting Space

FWCVB

Status Open

Currently Assigned Andrea Timbes, CTA, CNSA (Reassign)

PRINT RESPONSE LOG

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	12/01/2043 - 12/03/2043	12/01/2043 - 12/02/2043		