



What is the Tourism Lead Catcher feature?

Key points:

- Who do you want the tourism lead catchers to be?
- Without having a lead catcher assigned on property, no one will be able to see Tourism 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 tourism 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 is a separate lead catcher for Meeting Sales & Tour/Travel.
- 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	Organization	Lead Status	Lead Name	Account	Group Type	Assigned Contact	Lead ID
	BDE Tour and Travel	Tentative	Fall Fest 2017	Simpleview, Inc	Tour		12
	BDE Tour and Travel	Tentative	Fall Fest 2016	Simpleview, Inc	Tour	Chris Feerick	8

Assigned Contact

Actions	Organization	Lead Status	Lead Name	Account	Group Type	Assigned Contact	Lead ID
	BDE Tour and Travel	Tentative	Fall Fest 2016	Simpleview, Inc	Tour	Chris Feerick	8

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

The screenshot shows the 'Lead Detail' page for 'Simpleview, Inc.' with a total of 0 requested leads. The 'Responses' section shows a table with one entry for 'Simpleview, Inc.' with a status of 'Open' and 'None (Assign)' currently assigned. A yellow arrow points from the 'None (Assign)' button to the 'Assign Contact' modal. The modal includes a search bar and a list of contacts for 'Simpleview, Inc.'.

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	10/21/2017 - 10/23/2017	10/21/2017 - 10/23/2017		

Assign Contact

Search for Contact:
Search by Name

Simpleview, Inc

- Monica Catcher
- Nicholas Cheever
- Monica Contact
- NNQA-User CRM-LName
- Cynthia Croftcheck
- John Duncan
- B Emert
- Jocelyn Frazier
- Chris Feerick
- Chris Feerick
- Liz Fernstrom
- Chris George
- Chris George
- Lauren Isely
- Jessica Johnson
- Kara Kaczmarzyk
- Joe Kupiszewski
- Jeremy Laux
- Chris Martin
- Traci Miller
- Dr Daniel Nowlan
- CRM Nowlan
- Test Person
- Aaron Pickering
- Derrick Race
- Jennifer Reichenbach

When a Tour RFP Catcher views the Opportunities grid, they will be able to see all Tour leads sent to the accounts where they are set as Tour RFP Catcher. They will also be able to see a new column called "Assigned Contact" which displays the name of the Tour RFP Contact that is assigned to the lead.

Assigned Contact

The screenshot shows the 'Assigned Contact' page for 'FWCVB'. The status is 'Open' and the assigned contact is 'Andrea Timbes, CTA, CNSA (Reassign)'. A yellow arrow points to the 'Assigned Contact' field. Below the form is a table with one entry for 'FWCVB' with meeting dates from 12/01/2043 to 12/03/2043 and room request dates from 12/01/2043 to 12/02/2043.

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		

The partner set as the Tour RFP Contact will see a similar grid, but they will only see Tour leads where they are listed in the Assigned Contact column