



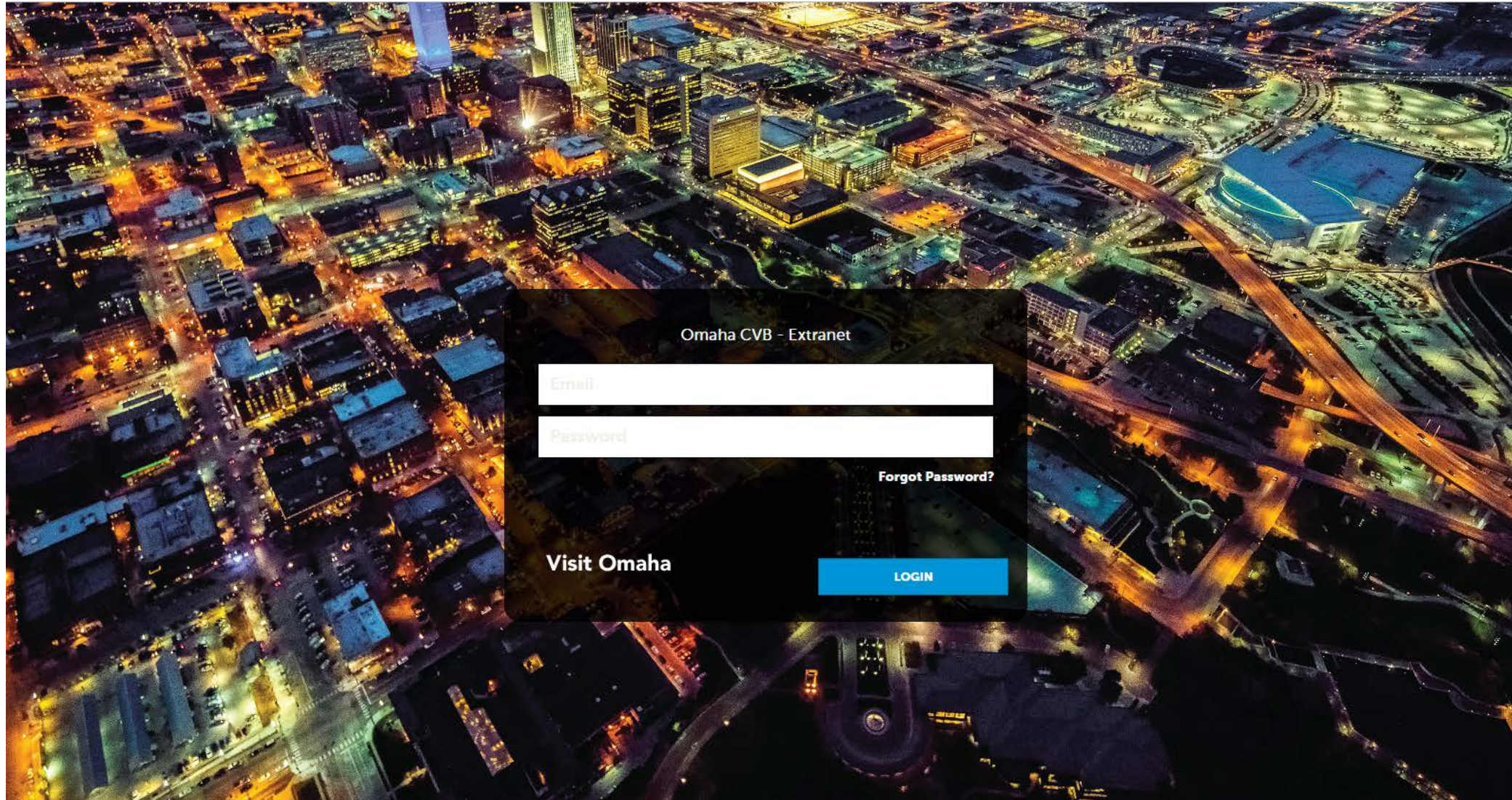
## PARTNER EXTRANET TRAINING GUIDE: RFPS, LEADS AND SERVICE REQUESTS

**Questions, Comments, Concerns**

**Hotels:** Sue Chevalier 402-444-1624 or [schevalier@visitomaha.com](mailto:schevalier@visitomaha.com)

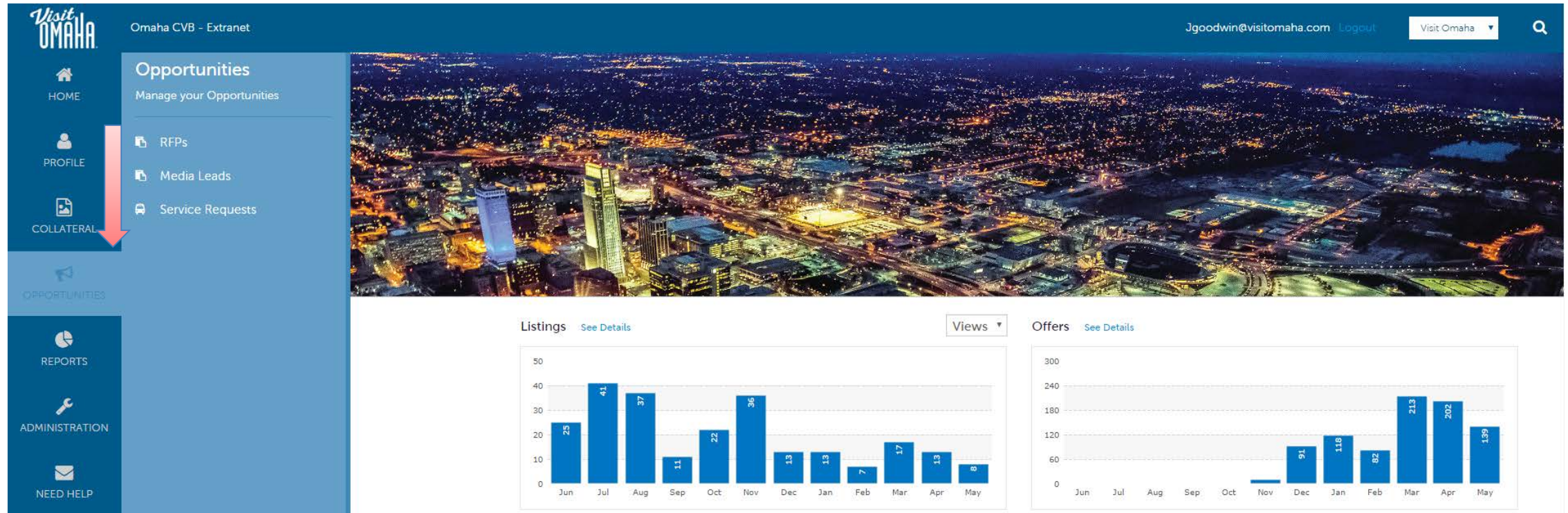
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# LOGIN SCREEN





# 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

## RFPs

Filters (1)

Manage Filters

Responded is:

Lead Name contains:

Group Type is one of:

CHOOSE

Property Lead Status is one of:

OPEN, OPEN/ BID SENT

APPLY FILTERS

CLEAR FILTERS

Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
No Records Were Found												

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<sub>(CONT'D)</sub>

## RFPs

Filters (1)

Manage Filters

Responded is:

Lead Name contains:

Group Type is one of:

CHOOSE

Property Lead Status is one of:

OPEN, OPEN/ BID SENT

APPLY FILTERS

CLEAR FILTERS

Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
No Records Were Found												

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<sub>(CONT'D)</sub>

The screenshot displays a CRM interface for viewing a lead. On the left is a sidebar with a 'RETURN' button at the top. Below it, under the heading 'Sections:', is a list of navigation links: 'Lead Information', 'Meeting Dates', 'Additional Lead Information', 'Room Summary', 'History/Futures', 'Notes', 'Responses', 'Signage', 'General', and 'Room Data'. A red arrow points to 'Lead Information'. The main content area on the right shows lead details for 'crm@simpleviewinc.com' with ID '123.123.1234'. It includes a link to 'See attached RFP for more details.' (with a red arrow), a list of sections like 'Meeting Requirements', 'Schedule of Events', 'Action Requested', 'Comments', 'Competitive Sites', 'Meeting Specs', 'Lost Business Code', and 'Lost Comments'. The 'Meeting Specs' section contains a link to '2016-Annual-Convention-RFP.docx' (with a red arrow).

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<sub>(CONT'D)</sub>

## 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 Visit Omaha if you are pursuing the business by selecting **Yes** or **No** to the **Pursuing this Lead** option.



# OPPORTUNITIES - RFPS<sub>(CONT'D)</sub>

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<sub>(CONT'D)</sub>

The screenshot displays the 'OPPORTUNITIES - RFPS' interface. On the left, there are two buttons: 'SAVE' (blue) and 'CANCEL' (grey). Below them is a 'Sections:' list with four items: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'File Attachments' link to the 'File Attachments' section on the right. 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 a red arrow pointing to it. Below this is a light grey box containing the text 'No files have been attached'. Above the 'File Attachments' section is a table with two rows: 'Total' and 'Requested'. The 'Total' row has five columns with values 0, 0, 0, 0, 0. The 'Requested' row has five columns with values 10, 10, 10, 10, 10. A red arrow points from the 'SAVE' button to the table.

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

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments

**File Attachments**

**ATTACH FILE** or drag files to the page

No files have been attached

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	

Page 1 of 1

Go to Page: 1

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<sub>(CONT'D)</sub>

RETURN

Sections:

Opportunity Information

Responses

Notes

General

SAVE

CANCEL

Sections:

Lead Information

Response Information

File Attachments

Responses

Simpleview Hotel and Conference Center

Status Open

Add/Edit	Room Request Dates	Pursuing?	Comments
	09/10/2015 - 09/13/2015		

Response Information

Pursuing this lead: Required

☐ YES ☐ NO

Account: Required

Simpleview Hotel and Conference Center

Comments: Required

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:  

CHOOSE ▾

Lead contains:

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

The screenshot displays a web interface for viewing service requests. It features a sidebar on the left with a 'RETURN' button and a list of sections: Request Information, Request Dates, Contact Information, Additional Notes and Documents, and Accounts/Responses. The main content area shows details for a request, including Attendees (1200), Deadline (08/12/2015), Budget (\$13,000), Location (To/From Hotel & Convention Center), and Description (Need transportation shuttles for convention running all day from 7am to 7pm.). Under the Description, there is a link to a document titled '2016-Annual-Convention-RFP.docx'. Below this, a section titled 'Additional Notes and Documents' is expanded, showing a table of attachments. The table has columns for File, Title, Category, and Description. One attachment is listed: 'RFP' under Title, 'Spec Sheet' under Category, and 'See attached RFP for more details' under Description. Red arrows indicate the flow of information from the sidebar sections to the corresponding details in the main content area.

**RETURN**

Sections:

- Request Information
- Request Dates
- Contact Information
- Additional Notes and Documents
- Accounts/Responses

Attendees 1200

Deadline 08/12/2015

Budget \$13,000

Location To/From Hotel & Convention Center

Description Need 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 details in the **Request Information** section along with **RFP** attachment downloads.

# 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 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<sub>(CONT'D)</sub>

**Accounts/Responses**

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

**General**

Decision Date

Food / Beverage

Misc. Expense

Category

Economic Value - Lauren Test

**Bureau-Only Comments:**  
These comments will not be seen by the client. They will only be seen by bureau staff.

**ATTACH A FILE**

No files have been attached

**UPDATE** **CANCEL**

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

## RFPs

Filters (1) [Manage Filters](#)

Responded is:

Lead Name contains:

Group Type is one of:

CHOOSE ▾

Property Lead Status is one of:

CLOSED/ WON ▾

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 05/11/2012 Assist

APPLY FILTERS



CLEAR FILTERS



Actions	Lead ID ▾	Lead Name	Property Lead Status	Group Type	Lead Type	Organiz
	7035	AMERICAN CLASSIC TOURS	Closed/ Won	Tour		Grayslak Classic T

*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	<a href="#">Visit Omaha</a>		12/04/2006	12/07/2006	
	5760	IOWA STATE SAVINGS BANK	Closed/ Won	08/24/2010	Tour		Iowa State Savings Bank	<a href="#">Visit Omaha</a>		09/19/2007	09/20/2007	



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

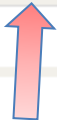


Lead ID	10058
Meeting Name	Karate for Kids Meeting 2015
Account	Hilton by the Shore
Profile	Karate Affiliation
Organization	Karate for Kids
Organization Address	4956 N Park Ln Bonham TX 75418
Contact	Rita Duncan 4956 N Park Ln Bonham TX 75418 United States  520-424-1020 (Ext. 680) rduncan@karateforkids.com
Meeting Planner Contact	

When viewing the lead, you can skip to 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	
<a href="#">Daysout</a>   <a href="#">Pickup</a>	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: 25

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.*



## FIND MORE TRAINING GUIDES UNDER “PARTNER BULLETINS”

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