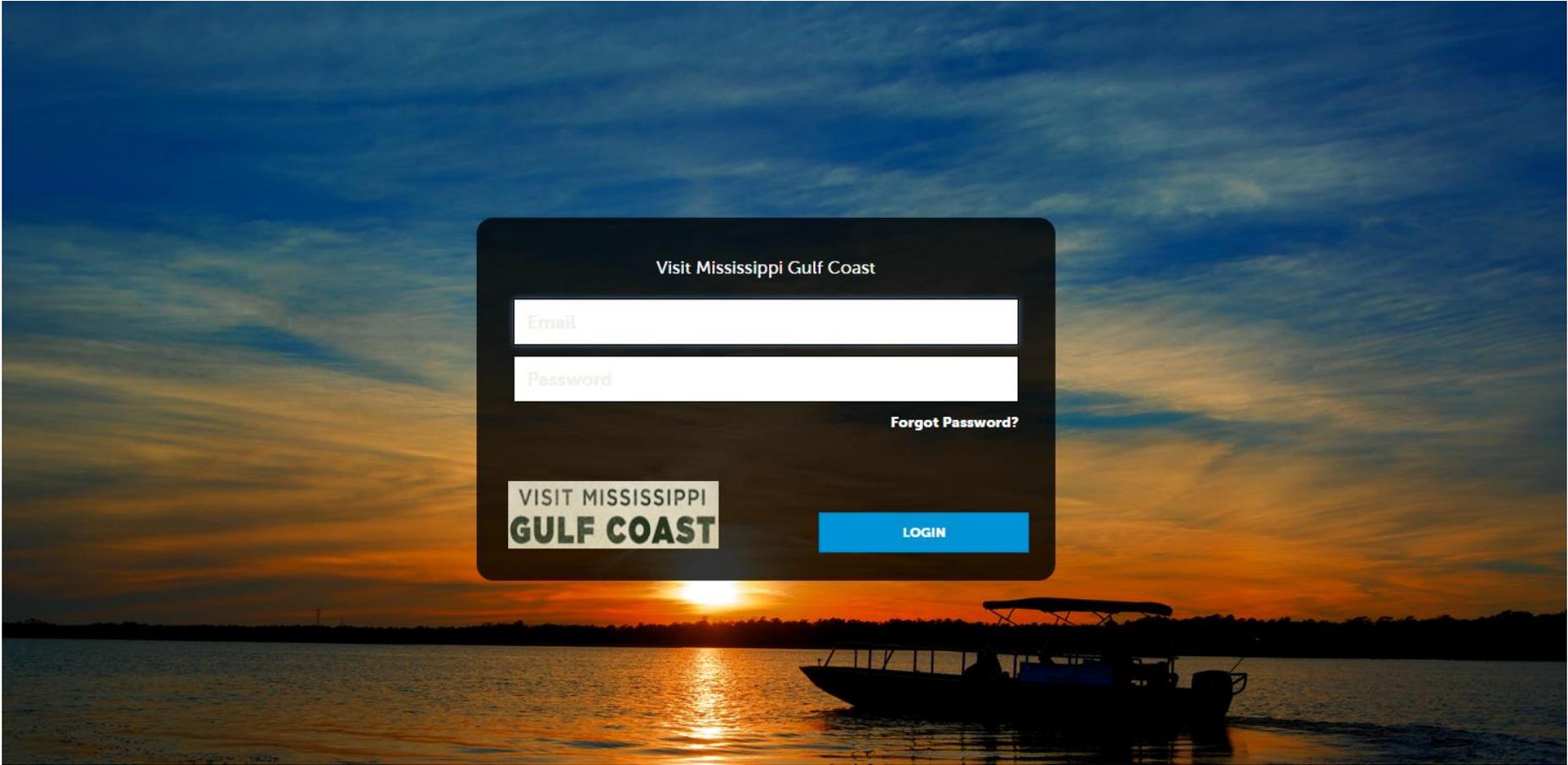


# Login Screen – Opportunities/Leads/RFPs



# Home Screen (Opportunities/Leads/RFPs)

The screenshot displays the user interface for the 'Visit Mississippi Gulf Coast' system. At the top, the logo and name are on the left, and a dropdown menu for 'Simpleview Hotel and Conference Center' is on the right. The left sidebar features navigation options: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and REPORTS. A red arrow highlights the transition from the PROFILE icon to the OPPORTUNITIES icon. The main content area is titled 'Opportunities' and includes a sub-header 'Manage your Opportunities'. Below this is a list of categories: RFPs, Media Leads, and Service Requests. A 'Post Board' section is visible on the right, showing a list of posts with details like dates and content.

Clicking the **Opportunities** icon, displays options for RFPs (**LEADS**) sent by the Bureau. Opportunities are broken in to RFPs (Meeting Sales, Sports Marketing, and Tour/Travel Leads), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs).



# Opportunities/Leads/ RFPs

**RFPs**

Filters (1) Manage Filters

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Status is one of:

**APPLY FILTERS** **CLEAR FILTERS**

After you click the RFP icon and then RFPs, you will be presented with your property's Sales, Sports and Tour/Travel Leads. By Default, you will see all of your **Open Leads** and **Opens Leads** you have already bid on.

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.



# Opportunities/Leads/ RFPs (cont'd)

## 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/Leads/ 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. 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, Sports Marketing or Tour Lead.

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



# Opportunities/Leads/ 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.



# Opportunities/Leads/ 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 (+) to add your response or Pencil to edit your previous response.



# Opportunities/Leads/ 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/Leads/ 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/Leads/ RFPs (cont'd)

The screenshot displays a software interface with two main sections. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' menu with four options: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. A red arrow points from the 'SAVE' button to the top of the summary table. Another red arrow points from 'File Attachments' in the menu to the 'File Attachments' section below. A third red arrow points from the 'ATTACH FILE' button to the text 'or drag files to the page'.

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

**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/Leads/ RFPs 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.

If you have any questions regarding Room Pickups, please contact Jessica Knesal, [jessica@gulfcoast.org](mailto:jessica@gulfcoast.org) or Janice Jones, [janice@gulfcoast.org](mailto:janice@gulfcoast.org).



# Opportunities/Leads/RFPs Pickup (cont'd)

## RFPs

Filters (1) Manage Filters

Responded is:

Response Date:

Lead Name contains:

Create Date:

Lead ID contains:

Organization contains:

Group Type is one of:

Property Lead Status is one of:

- 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

After the business has past, you should receive an e-mail from **Jessica Knesal** asking you to update the room pickup giving you the name of the group and the dates they should have been at your property. 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 enter the name of the lead from Jessica's e-mail.



# Opportunities/Leads/RFPs 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	<a href="#">Simpleview Summit 2016</a>	Closed/Won	11/25/2015	Meeting	Convention	chris martin account	<a href="#">Simpletime z hotel</a>	12/31/2015	04/18/2016	04/20/2016	
	10058	<a href="#">Karate for Kids Meeting 2015</a>	Closed/Won	01/01/2007	Meeting	Group	Karate for Kids	<a href="#">Hilton by the Shore</a>	12/01/2015	12/15/2015	12/18/2015	

To access the Lead, click on the Eyeball icon or the Lead Name.



# Opportunities/Leads/RFPs 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/Leads/RFPs 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   Pickup</a>	Hilton by the Shore					



Click on the Pickup button to access the room block information.



# Opportunities/Leads/RFPs Pickup (cont'd)

**SAVE**

**CANCEL**

Peak requested 25

Additional room requests/needs

Sections:

[Lead Information](#)

[Room Summary](#)

[Pickup Rooms](#)



## Pickup Rooms

Pickup Rooms:

Pickup Avg. Daily Room Rate:

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.

