

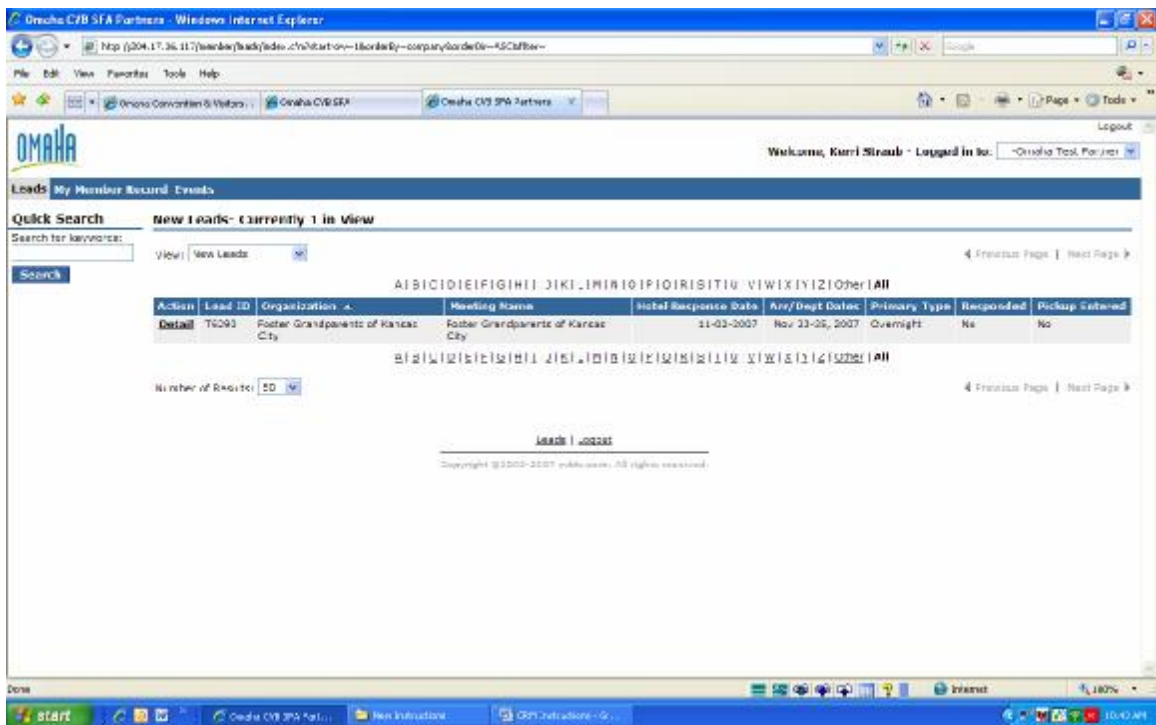


Partner CRM Instructions
Group Tour Sales Leads

Omaha Convention & Visitors Bureau
1001 Farnam St
Omaha, NE 68102
www.visitomaha.com

Reviewing Leads:

1. Upon logging in, you will be taken to your home screen – the default is the leads tab.
2. On this screen, you can view the following:
 - a. All Leads
 - b. New Leads
 - c. Pending Leads
 - d. Closed/Won Leads
 - e. Closed/Lost Leads
 - f. Closed/TBD Leads (meeting has chosen Omaha, but hasn't selected hotels yet)
3. You are able to sort your list of leads by clicking on any of the column headers (i.e. Meeting Name, Organization, etc)
4. If you select "New Leads," that will show the leads that are waiting for you to respond to.
5. In order to differentiate between a Meeting Sales lead and a Group Tour lead, please note the first letter of the Lead ID (if it is T, it is a Tour lead, if it is C it is a Convention lead)



The screenshot shows a web browser window displaying the Omaha CVB SFA Forterra website. The page is titled "Leads" and shows a list of leads. The table below is a representation of the data shown in the screenshot.

Action	Lead ID	Organization	Meeting Name	Hotel Response Date	Arr/Dpt Date	Primary Type	Responded	Pickup Deferred
Detail	T0093	Foster Grandparents of Kansas City	Foster Grandparents of Kansas City	11-02-2007	Nov 22-26, 2007	Overnight	No	No

The screenshot also shows a search bar, a "View" dropdown menu set to "New Leads", and a "Number of Records" dropdown set to "20". The page footer includes the text "Leads | 100282" and "Copyright ©2003-2007 msk.com. All rights reserved."

6. Click on the Lead Detail to open and respond to it.
7. Fill in the appropriate information, and click "submit" at the bottom
8. Items in red are required fields

9. If a client response is required, click on the client's e-mail address to send your response directly to the client (respond to the CVB online in addition to this response)
10. Hotel Response Date – after this date, you will not be able to respond or edit your lead responses online. Please contact the CVB.

Sample Group Tour Lead Screen:

The screenshot displays the 'Lead Detail' page for lead ID 76290. The page is divided into several sections:

- Quick Search:** A search bar with the text 'Search for keywords:' and a 'Search' button.
- Lead Detail:** A table-like layout showing lead information:
 - Lead ID: 76290
 - You Name: Foster Grandparents of Kansas City
 - Organization: Foster Grandparents of Kansas City
 - Contact: Kathy Kerr
 - Contact Email: kka@fgpa.org
 - Hotel Response Date: 11-02-2007
 - Remarks Type: Overnight
 - Arrive: 11-23-2007
 - Departure: 11-25-2007
 - Range: --None--
 - Rooms: Single: 13, Double: 13, King: Multiple, Suite: , Jet: , Suite:
 - Status: New
 - Source Code: In Call
 - Market Segment: Motortravel
 - Contact Address: 3238 Euclid Ave, Kansas City, MO 66182, USA
 - Contact Phone: 913-821-5255
 - Client Type: Senior Centers
 - Response Option: --None--
 - People: 40
 - Nights: 40
 - Requested Rooms: 30
- Company Profile:** Travel program associated with Catholic Charities organization
- Comments:** Kathy called and wanted to stay at same Omaha Hotel as the Foster Grandparents of Northeast Kansas. (Link: edit)
- Response Window:** A modal window titled 'Response Information' with the following elements:
 - 'Pursuing this lead?' with a 'Yes' radio button selected.
 - 'File Attachments:' with a text input field containing 'None' and 'Add', 'View', 'Remove' buttons.
 - 'Comments:' with a large text area.
 - 'No files are allowed.'
 - 'Update' and 'Reset' buttons.

Entering Pickup:

1. Once a meeting has been turned into definite business, you will see a "pickup" tab between the Response & History/Futures tabs
2. After the meeting has taken place, you will enter the number of rooms you received from this meeting
3. On your main Leads screen, on the far right hand side of the title bar (blue bar that says Meeting Name, Organization, etc), you can see if you have entered Pickup information for each meeting (it will say Yes or No)



The screenshot shows a software interface with a 'Pickup' tab selected. Below the tab is a table for entering pickup information. The table has columns for 'Date' and days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun). The 'Date' column contains dates: 4-6, 4-7, 4-8, 4-9, 4-10, and empty cells for 4-11 and 4-12. The 'Rooms' row has empty input fields for each date. Below the table is an 'Update Pickup' button. At the bottom of the interface are 'Return' and 'Print View' buttons.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Date	4-6	4-7	4-8	4-9	4-10		
Rooms							

Update Pickup

Return Print View

Leads in your "My Member Record":

Under "My Member Record," you can see a report of the leads you have received through our system:

1. Click on "My Member Record" in the blue bar in the upper left hand corner of the screen
2. Click on the "Benefits Summary" tab under your Account Details
3. Click on the "Leads" tab under the Benefits Summary tab

Leads:

1. The Leads section shows the following for hotels, in response to Convention Sales and/or Group Tour Leads distributed to them:
 - a. Number of Leads Pending
 - b. Number of Service Leads
 - c. Number of Leads Won
 - d. Number of Leads Lost (Meeting was Lost)
 - e. Number of Leads Lost (Chose another Hotel)
 - f. Number of Leads Won, but Cancelled

The screenshot shows a web browser window displaying the Omaha CYS SPA Partners website. The page is titled "My Member Record" and shows account details for "Omaha Test Partner". The "Benefits Summary" tab is selected, and the "Leads" sub-tab is active. A date range is set from 01-01-2007 to 02-31-2007. Below this, a table titled "Convention Sales" displays lead counts for various categories. The "Total Number of Leads Sent" row is underlined, indicating it is clickable for more details.

Convention Sales	
Total Number of Leads Sent	0
Number of Leads Pending	0
Number of Service Leads	0
Number of Leads Won	0
Number of Leads Lost (Meeting was lost)	0
Number of Leads Lost (Chose another hotel)	0
Number of Leads Won, but Cancelled	0

2. If one of the breakouts is underlined, you can click on it to view details – the specific leads that fall under that definition