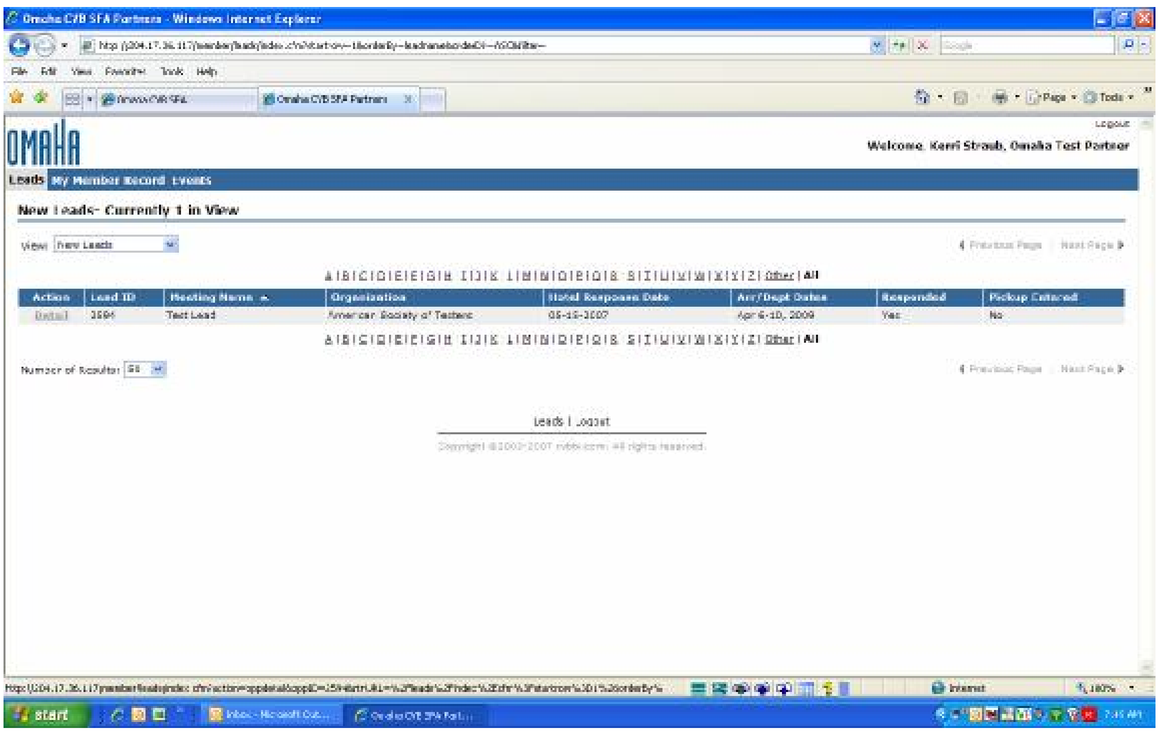
Partner CRM Instructions

Meeting Sales Leads

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

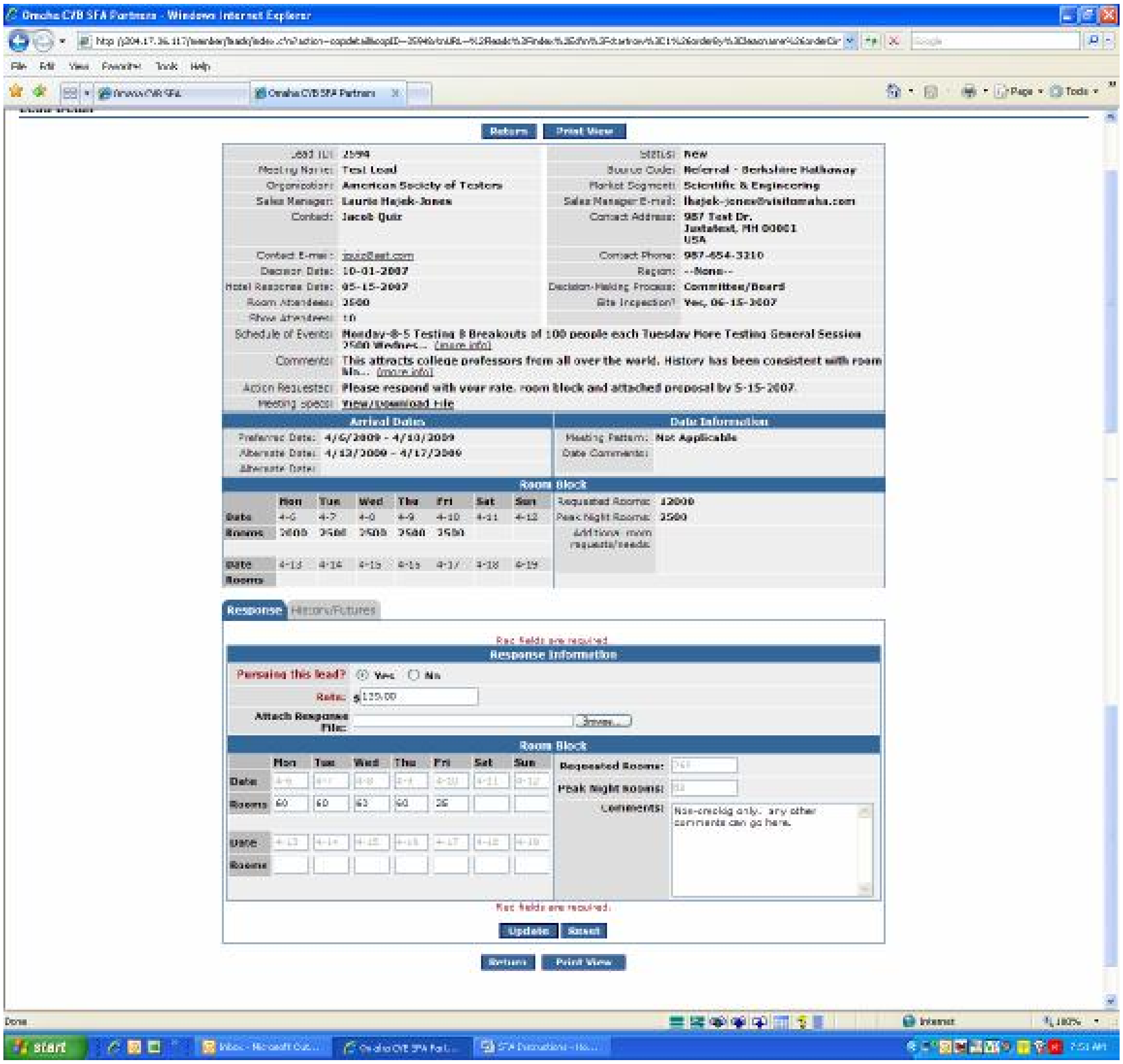
Reviewing Leads:

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.



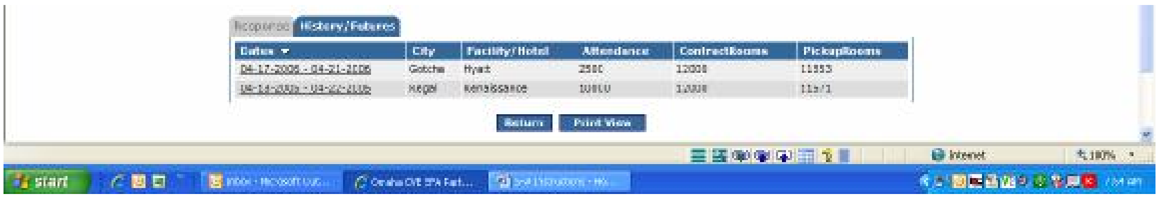
5. Click on the Lead Detail to open and respond to it.
6. Fill in the appropriate information, and click "submit" at the bottom
7. Items in red are required fields
8. If a client response is required, click on the client's e-mail address to send your response directly to the client (respond to the CVB online in addition to this response)
9. Hotel Response Date – after this date, you will not be able to respond or edit your lead responses online. Please contact the CVB.

Sample Lead Screen:



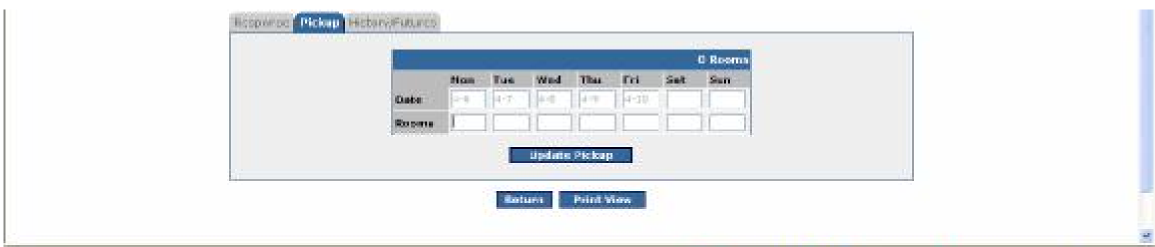
History/Futures:

1. You can click on the History/Futures tab to see a group's attendance and pickup for previous meetings held.



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)



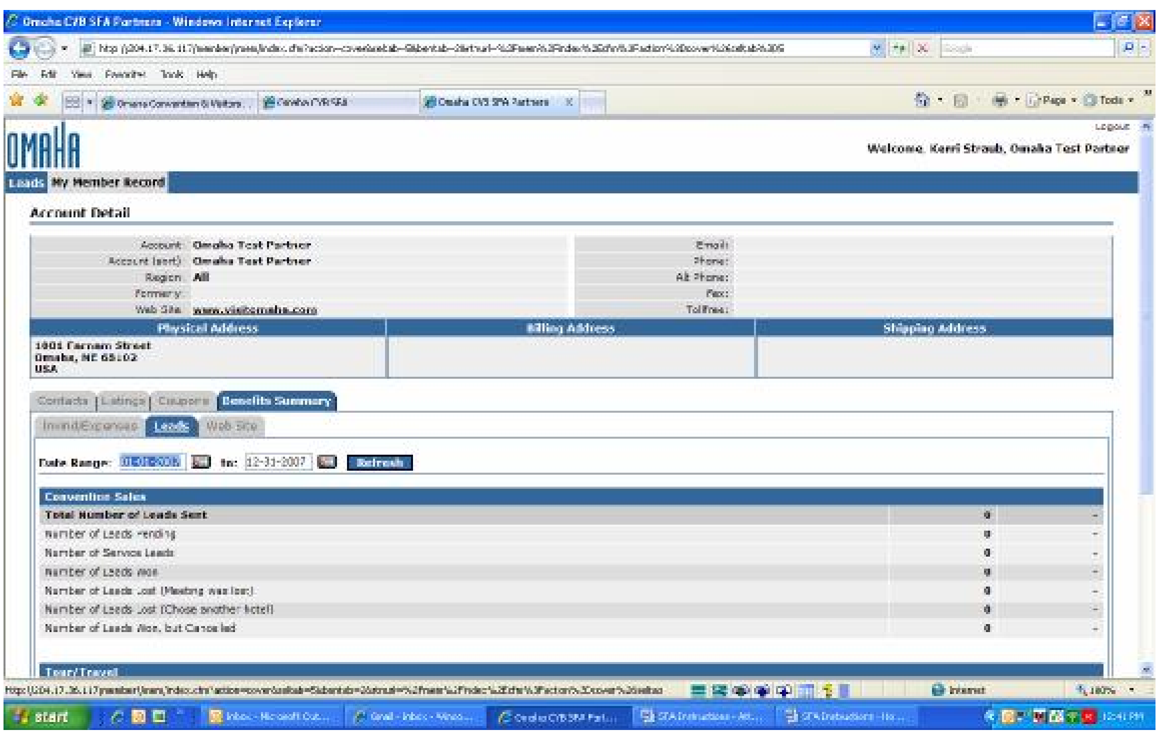
Leads in your “My Member Record”:

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



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