



Partner Lead Response System/Extranet Instructions

The Partner Lead Response System (Extranet) will allow our partners to respond to leads via the TVCVB website. This system will allow both the partner and the bureau an expedited means of circulating and responding to leads, creating a more streamlined process, ultimately allowing us to be more efficient with submitting proposals to our group leaders.

You will find it to be a very user-friendly system and should require minimal training. Below are screen-shots walking you through accessing and submitting your response to leads and service requests.

If you have any questions, or would like to request additional training for your staff, please contact Leslie Mercado at the TVCVB at 951-491-6085 or leslie@temeculacvb.com.

To login to the Extranet go www.temeculacvb.com/members/members-only/login/. Please notify the TVCVB is you need a Username and Password.

LEADS

Message: LEAD: A TEST LEAD - Message (HTML)

From: leslie@temeculacvb.com
To: Leslie Mercado
Cc:
Subject: LEAD: A TEST LEAD

Sent: Tue 9/27/2011 3:43 PM

LEAD

Temecula Valley Convention & Visitors Bureau
28690 Mercedes Street, Suite A
Temecula, CA 92590
Phone: (951) 491-6085, Fax: (951) 491-6089

Lead Date: 09/27/2011 **Due Date:** 09/28/2011 **Decision Date:** 09/30/2011 **Lead #:** 156
From: Leslie Mercado, Director of Sales -- (951) 491-6085, leslie@temeculacvb.com

Organization Name: ABC Test
Meeting Name: A Test Lead
Contact: Test tester
Address: **Title:**

Phone: **Fax:**
E-mail:

Meeting Dates: 10/10/2011 - 10/14/2011 **Alternate Dates:** - / -
Preferred Pattern: Monday - Friday

Competitive Sites: San Diego and Orange County

Total Attendance: 50
Total Room Nights: 200

	Mon, 10/10	Tue, 10/11	Wed, 10/12	Thu, 10/13	Fri, 10/14	Sat, 10/15	Sun, 10/16
Rooms Requested	50	50	50	50			

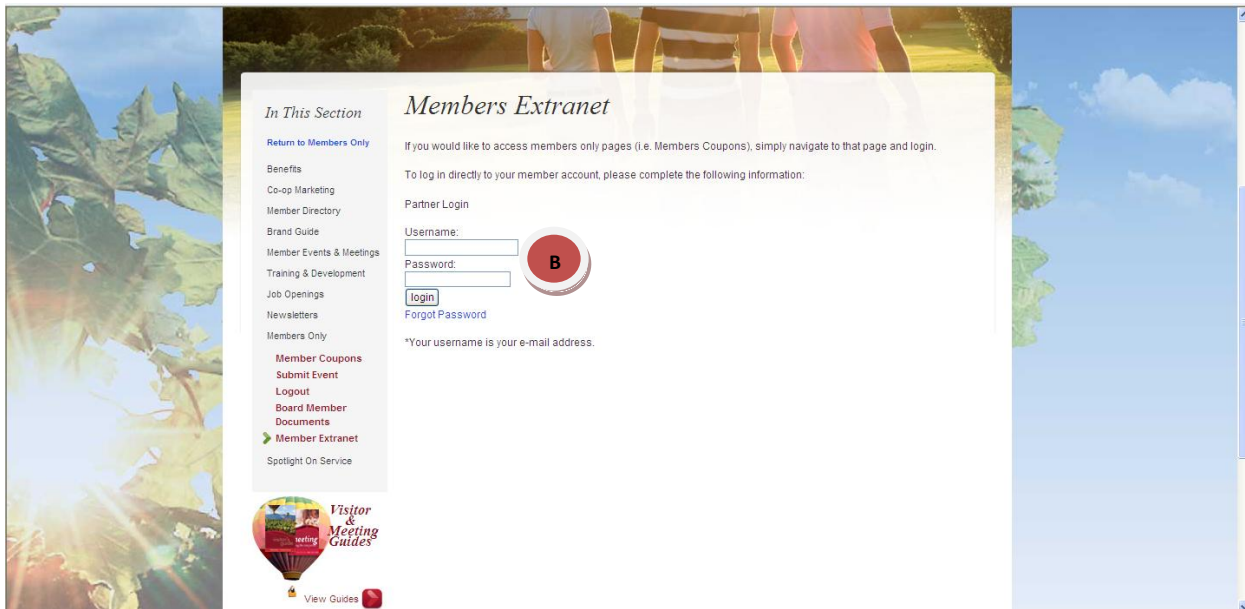
Meeting Requirements:
Please see attached RFP

Action Requested:
Please submit your proposal no later than 9/28/11
<http://www.temeculacvb.com/members/members-only/login> **A**

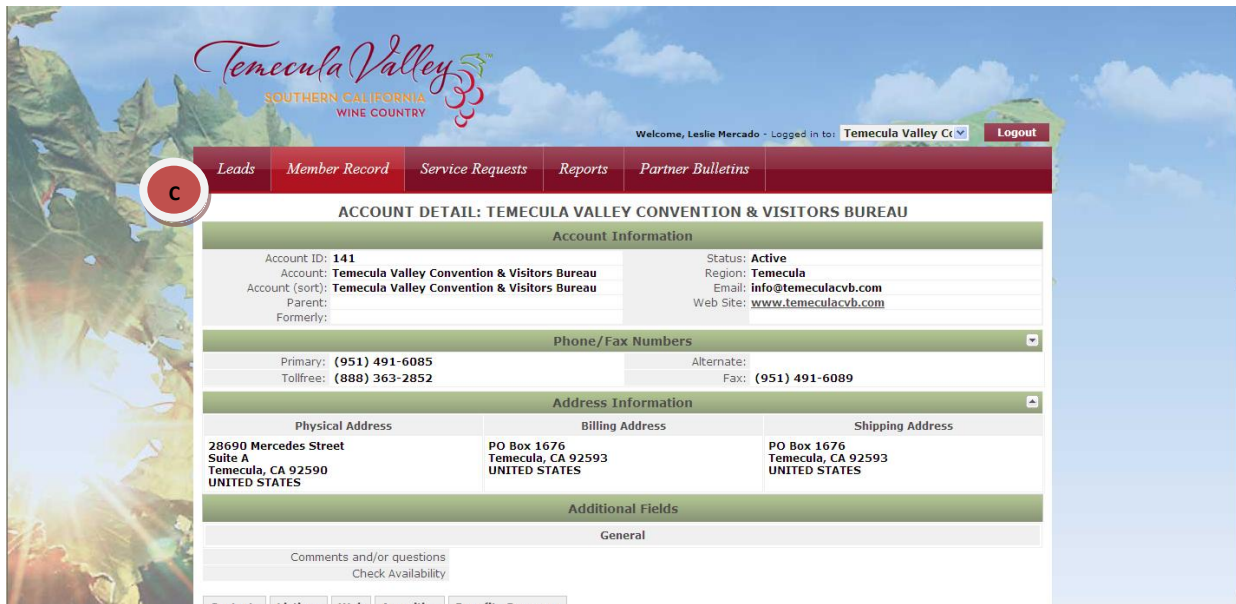
Site Inspection Date:
Site Inspection Comments:
Source Code: Referral

-- PLEASE COPY THE CONVENTION BUREAU ON ALL CORRESPONDENCE --

- When the TVCVB receives an RFP (request for proposal) a designated person from your organization will receive an email notification advising them a new lead has been assigned
- The email with details about the lead will look similar to the above
- A** • A link to login and respond to the lead will be provided in the email
- We encourage you to respond to all lead requests, whether or not you are pursuing the business



B You will need your **Username** and **Password** in order to login and respond. Please notify the TVCVB if you do not have one or have forgotten it



C Once you have logged in, click on the **Leads Tab** to access your new lead

Leads | Member Record | Service Requests | Reports | Partner Bulletins

ALL LEADS - CURRENTLY 2 IN VIEW

Filter: New --All Groups-- --All Responses-- Search By Keyword Page 1 of 1

Lead Type	Opportunity ID	Opportunity	Organiz	Hotel Response Date	Arr/Dept Dates	Status	Responded	Create Date
Meeting/Group	<u>155</u>	<u>A Test Lead</u>	ABC Test	09/28/2011	Oct 10-14, 2011	New	Yes	09/27/2011
Meeting/Group Sales	<u>156</u>	<u>A Test Lead</u>	ABC Test	09/28/2011	Oct 10-14, 2011	New	No	09/27/2011

Number of Results: 25 Page 1 of 1

Leads | Member Record | Service Requests | Reports | Partner Bulletins

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D All leads new and previous will be located in this section. Click on either the **Opportunity ID** (underlined number) or **Opportunity** (underlined lead name) in order to access the lead

E Please make note of the **Hotel Response Date**. Once this date has passed, you will no longer be able to access the lead and submit a response

Leads | Member Record | Service Requests | Reports | Partner Bulletins

Print View Return

OPPORTUNITY DETAIL (NEW): A TEST LEAD

Opportunity Information

Opportunity ID: 156
 Meeting Name: **A Test Lead**
 Account: **ABC Test**
 Contact: **Test tester**
 Type: **Annual Meeting**
 EEL Type: **Convention**
 Decision Making Process:
 Status: **New**
 Decision Date: **09/30/2011**
 Hotel Response Due: **09/28/2011**
 Repeat Business: **No**
 Sales Manager: **Leslie Mercado**
 leslie@temeculacvb.com
 (951) 491-6085

Meeting Requirements: **Please see attached RFP**
 Schedule of Events:
 Action Requested: **Please submit your proposal no later than 9/28/11**
 Comments:
 Competitive Sites: **San Diego and Orange County**
 Meeting Specs: **--None--**
 Lost Business Code: **--None--**
 Lost Comments:

Arrival Dates Date Information
 Preferred Date: **10/10/2011 - 10/14/2011** Date Comments:
 Alternate Date:
 Alternate Date:

Room Summary

Requested Rooms							Totals and Peak	
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Requested Rooms:	Peak Requested:
10/10/2011	10/11/2011	10/12/2011	10/13/2011				200	50
50	50	50	50				Additional room requests/needs	
100%	100%	100%	100%					

History/Futures
 History/Futures are not available for this lead

Additional Fields
 General
 Response Document: **-- No File Attached --**
 Site Inspection Comments

Responses

Add/Edit	Arrival - Departure	Room Request Dates	Responded	Last Updated	Comments	Attachments
Add Your Response	10/10/2011 - 10/14/2011 (Primary)	10/10/2011 - 10/13/2011	No Response Entered			No

Print View Return

F Click **Add Your Response** to respond to the lead

SOUTHERN CALIFORNIA WINE COUNTRY
 Welcome, Leslie Mercado - Logged in to: Temecula Valley CVB
 Logout

Leads | Member Record | Service Requests | Reports | Partner Bulletins

Response Information
 Pursuing this lead? Yes No

Comments: This is a required field, but this information can only be seen by the bureau

Bureau-Only Comments: This is not a required field, and this information can only be seen by the bureau, as well
These comments will not be seen by the client; they will only be seen by the staff of Temecula.

Rate Range: 159 to 159
Requested Rooms: 0 **Peak Night Rooms:** 0

Room Information

	Monday 10/10/2011	Tuesday 10/11/2011	Wednesday 10/12/2011	Thursday 10/13/2011	Friday 10/14/2011	Saturday 10/15/2011	Sunday 10/16/2011
Any	50	50	50	50			
Singles	0	0	0	0			
Doubles	0	0	0	0			
Suite 1	0	0	0	0			
Suite 2	0	0	0	0			
Any Type	0	0	0	0			
Total	0	0	0	0	0	0	0
Requested	50	50	50	50	0	0	0

File Attachments
 File Attachments: --None--
 Add View Remove

Save Return to Lead

- G** Click **Yes** if you are submitting a proposal or **No** if you are turning down the lead. We encourage you to respond to all leads whether or not you are pursuing the business.
- H** Submit any comments you may have. **Comments** are required if you have selected **No** and are turning down the lead
- I** Submit your **Rate Range**. If you are offering one rate, the rate will be the same number in each box. For multiple rates, list your lowest and highest rate being offered
- J** Submit the number of rooms per day you can offer the group in the **Room Information** section. You may break it down by type if you choose
- K** You may also upload additional documents in the **File Attachments** section (ie. Menus, Floor Plans, etc.)
- L** Once completed, click **Save**



Once you have responded to a lead, **Yes** will appear under the **Responded** heading



If you do not respond to a lead by the **Hotel Response Date**, you will not be able to access the lead once the date has passed



Once your response is submitted, you can **Edit Your Response** any time prior to the Hotel Response Date

SERVICE REQUEST

A **Service Request** is a lead with no hotel rooms attached (ie. Catering, Golf, Meeting Room, etc.) Responding to a Service Request is very similar to responding to a Lead

WINE COUNTRY

Welcome, Leslie Mercado - Logged in to: Temecula Valley Cv

Logout

Leads Member Record **Service Requests** Reports Partner Bulletins

ACCOUNT DETAIL: TEMECULA VALLEY CONVENTION & VISITORS BUREAU

Account Information

Account ID: 141	Status: Active
Account: Temecula Valley Convention & Visitors Bureau	Region: Temecula
Account (sort): Temecula Valley Convention & Visitors Bureau	Email: info@temeculacvb.com
Parent:	Web Site: www.temeculacvb.com
Formerly:	

Phone/Fax Numbers

Primary: (951) 491-6085	Alternate:
Tollfree: (888) 363-2852	Fax: (951) 491-6089

Address Information

Physical Address	Billing Address	Shipping Address
28690 Mercedes Street Suite A Temecula, CA 92590 UNITED STATES	PO Box 1676 Temecula, CA 92593 UNITED STATES	PO Box 1676 Temecula, CA 92593 UNITED STATES

Additional Fields

Once you have logged in, click on the **Service Request** tab

WINE COUNTRY

Welcome, Leslie Mercado - Logged in to: Temecula Valley Cv

Logout

Leads Member Record Service Requests Reports Partner Bulletins

ALL SERVICE REQUESTS - CURRENTLY 3 IN VIEW

Filters: --Any Status-- --All Groups--

Starts With: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Request Type	Request ID	Service Request	Contact	Lead	Type	Deadline	Status	Responded
Media/PR	12	John Blanchette	John Blanchette	American Institute of Food & Wine Magazine	Wine Tasting and Tour	08/19/2010	Pending	No
Special Events	20	Kromatic Hair Salon Meeting	Miranda Miranda		Meeting Room	10/06/2010	Pending	No
Meeting/Group Sales	41	Test	Test tester	A Test Lead	Catering Test	09/30/2011	New	No

Starts With: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Number of Results: 25

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Select the Service Request you are responding to

Leads Member Record Service Requests Reports Partner Bulletins

SERVICE REQUEST DETAIL: TEST

Request Information

Request ID: **41**
 Account: **ABC Test**
 Lead: **A Test Lead**
 Request Name: **Test**
 Date(s): **09/30/2011 - 10/01/2011**
 Time(s): **01:00 PM - 02:00 PM**
 Deadline: **09/30/2011**
 Description/Notes: **Catering Test**
 Additional Documentation: **--None--**
 Services Manager:

Request Type: **Catering Test**
 Request Status: **Request**
 Attendees: **100**
 Budget:
 Location:

Contact Information

Contact: **Test tester**
 Title:
 Company: **ABC Test**
 Phone:
 Fax:
 Email:

Address:
 City:
 State:
 Zip:
 Country:

Responses

Add/Edit	Start Date- End Date	Responded	Last Updated	Comments
Add Your Response	09/30/2011 - 10/01/2011	No Response Entered		

[Return](#)

R Click **Add Your Response**

Response Information

Pursuing this lead? Yes No

T Comments:

Bureau-Only Comments:

File Attachments

U File Attachments:

[Add](#) [View](#) [Remove](#)

V [Save](#) [Close](#)

S Click **Yes** or **No**

T Submit your **Comments** (required.)

U Upload any attachments

V Click **Save** to submit your response