EXPLORE ASHEVILLE

POWERED BY
Buncombe County Tourism Development Authority

Comprehensive Guide to Sales Leads in the Partner Portal

Explore Asheville works with lodging properties in Buncombe County to accommodate groups coming to town for business, conferences, sports, weddings, reunions, leisure, and more. The **Opportunities** section of the Partner Portal is your hub for viewing and responding to sales leads and submitting RFPs.

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SECTION 1: UNDERSTANDING SALES CONTACT ACCESS TYPES

Two types of Partner Portal users can interact with sales leads:

- **Sales Lead Catcher**
  - Recipient of all lead alerts from Explore Asheville
  - Has the ability to view and respond to ALL leads
  - Can delegate/assign leads to other team members
  - Typically filled by a Director of Sales

- **Sales Contact**
  - Limited to viewing and responding to leads that are assigned to them by a lead catcher
  - Typically filled by a Sales Manager

SECTION 2: GETTING STARTED

First-Time Setup

1. Request access by emailing **spearsall@exploreasheville.com**
2. Specify whether you need access as a Lead Catcher or Sales Contact
3. Receive login credentials for the Partner Portal via email

Verifying Your Access

Sometimes, you can enter the Partner Portal, but might not have access to leads unless you've requested this from the Explore Asheville team. To check your access:

1. Log in to the **Explore Asheville Partner Portal**
2. Look for "RFPs" in the blue sub-navigation menu
3. If you **do not** see "RFPs," contact spearsall@exploreasheville.com for access

Note: Lodging properties can have multiple lead catchers and sales contacts per account.

SECTION 3: LEAD NOTIFICATIONS

**Lead Catchers will receive email notifications for:**

- New sales leads available for review
- Lead status changes to Definite
- Lead status changes to Lost
- Lead status changes to Cancelled

Note: Sales Contacts do not receive automatic notifications for new leads from Explore Asheville, only lead catchers do. Sales contacts only receive email notifications when a lead catcher has assigned them a new lead.
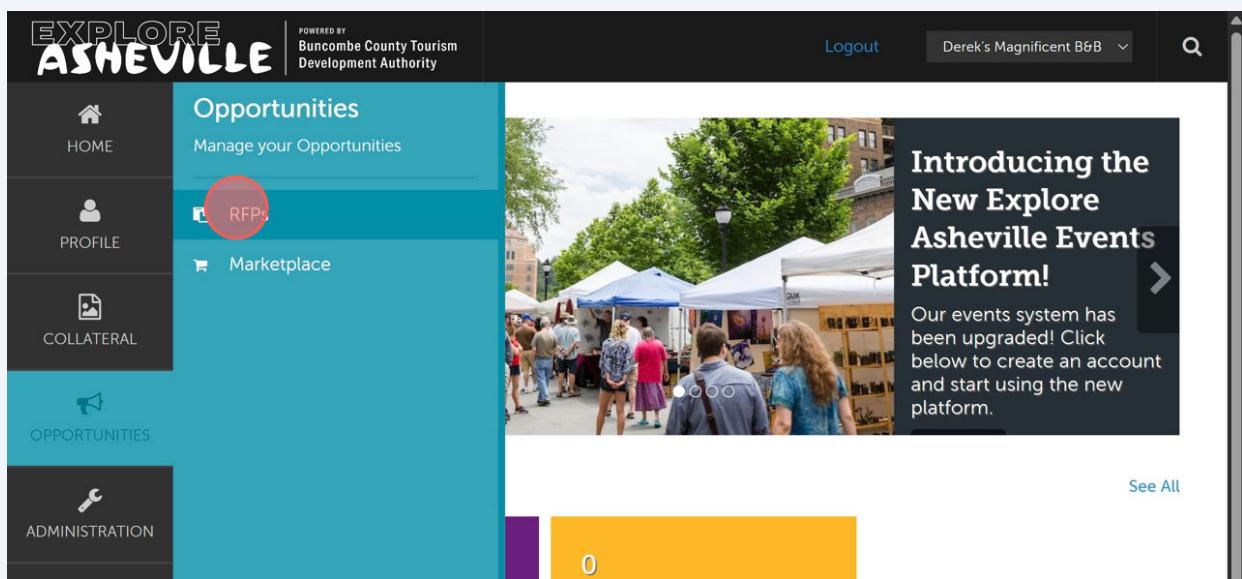
SECTION 4: VIEWING AND ASSIGNING LEADS

Accessing Leads

1   Log in to the Partner Portal, then click **OPPORTUNITIES** in the left menu
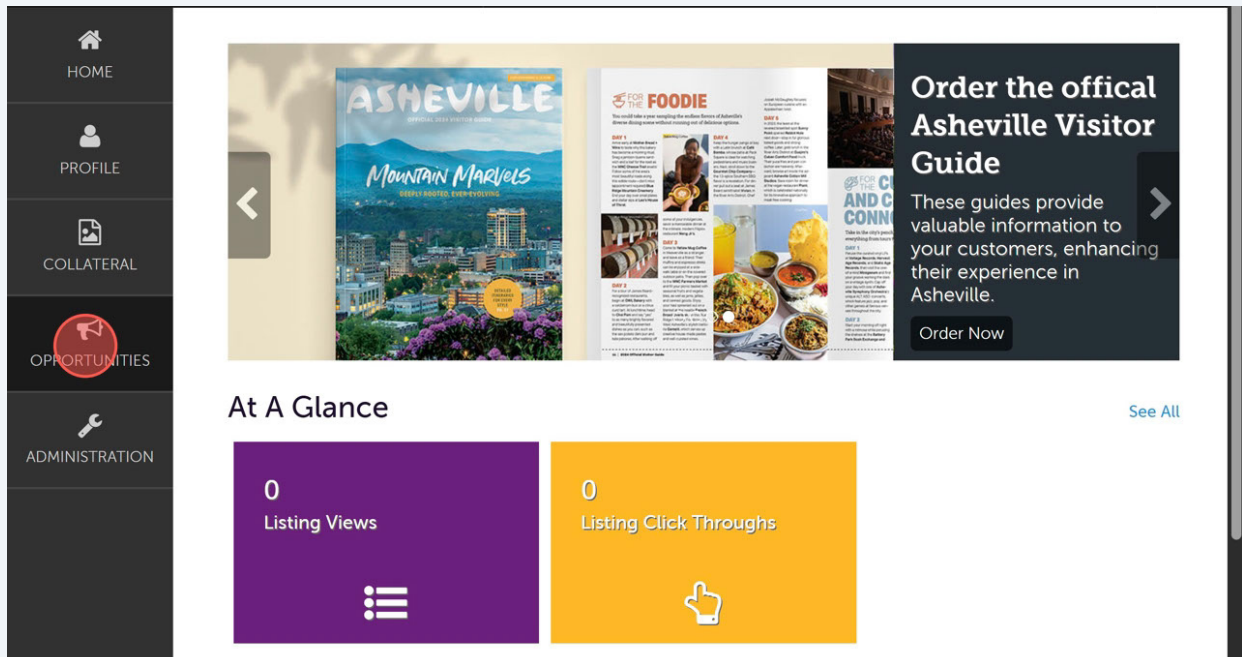
2   Click **RFPs** in the blue sub-menu

3   Lead dashboard will appear here

Actions	Lead ID ▼	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	⚙
👁	34566	2016 Farlow / Zeiger Wedding	Closed / No Bid Sent	01/23/2015	Meeting	Wedding	Weddings 2016	Derek's Magnificent B&B	02/04/2015	01/08/2016	01/10/2016	
👁	34080	2015 Corey / Kelley Wedding	Closed / Lost to Another City	06/03/2014	Meeting	Wedding	Weddings 2015	Derek's Magnificent B&B	06/11/2014	05/14/2015	05/17/2015	

Customizing Lead Dashboard with Filters

ⓘ The lead dashboard is customizable by filters such as date, status, and more. Filters stay activated between user sessions, so ensure your filters are set desirably to show all lead details that you need.

- **Active leads (status: Open or Open/Bid Sent) appear automatically**
- To find other leads (past, closed, etc.), use the filter function (see steps below)

1   Click **Manage Filters** (top right)

2   Choose **Columns** or **Filters**

3   Select desired filters

4   Click **Apply Changes**

PROFILE	
COLLATERAL	
OPPORTUNITIES	
ADMINISTRATION	

Filters (0)

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

CHOOSE ▾

APPLY FILTERS

Response Date:

-All Dates-

Create Date:

-All Dates-

Organization co

Property Lead St

CHOOSE ▾

O Pursuing
O Read
☑ Responded
☑ Response Date
O Room - Pickup Peak
O Rooms - Blocked - Peak
O Rooms - Blocked - Total
O Rooms - Pickup - Total
O Rooms - Requested - Peak
O Rooms - Requested - Total
O Sales Manager
O Source Code

APPLY CHANGES

CANCEL

RESET

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5   Filter settings stay active between sessions. Click **Reset** to revert to original settings.

PROFILE	
COLLATERAL	
OPPORTUNITIES	
ADMINISTRATION	

Filters (0)

Responded is:

Lead Name contains:

Lead ID contains:

Group Type is one of:

CHOOSE ▾

APPLY FILTERS

Response Date:

-All Dates-

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CHOOSE ▾

☑ Response Date
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O Room - Pickup Peak
O Rooms - Blocked - Peak
O Rooms - Blocked - Total
O Rooms - Pickup - Total
O Rooms - Requested - Peak
O Rooms - Requested - Total
O Sales Manager
O Source Code

APPLY CHANGES

CANCEL

RESET

6   Then, choose either **Filters Only, Columns Only,** or **Reset All**
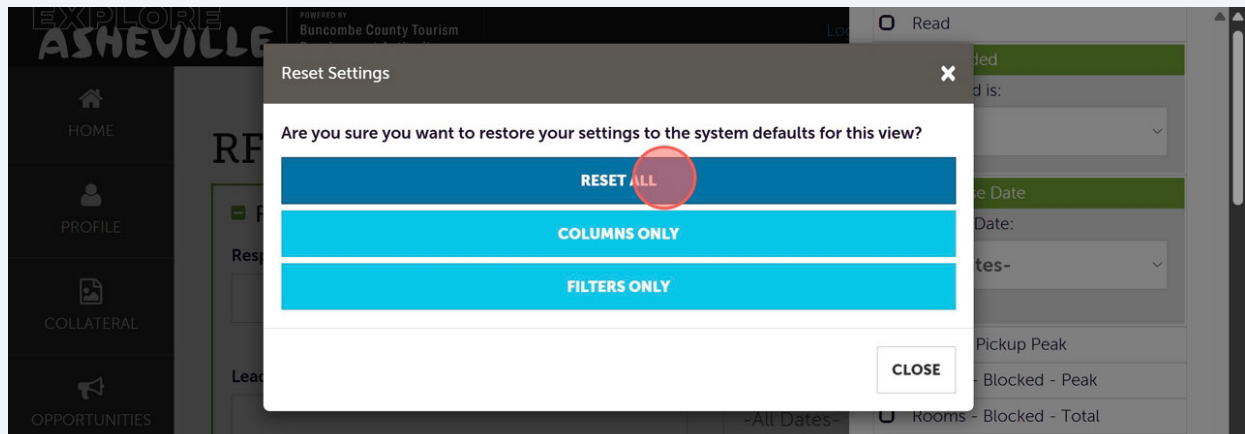
How to View Lead Details

Open the lead by clicking the **lead's name** or the **eye icon** next to the lead

Assigning Leads (Lead Catchers Only)

1   Open the lead by clicking the **lead's name** or the **eye icon** next to the lead

2   Click **Responses** in the left menu

3   Find the **Currently Assigned** field, then click **Assign**

4   Select assignee, then click **Save**

ⓘ   Once a lead is assigned, the Partner Portal automatically emails team members of lead assignments.

SECTION 5: RESPONDING TO LEADS

1   Click **OPPORTUNITIES** in the left menu

2   Click **RFPs** in the blue sub-menu

3   Open the lead by clicking the **lead's name** or the **eye icon** next to the lead

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Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
👁	34566	2016 Farlow / Zeiger Wedding	Closed / No Bid Sent	01/23/2015	Meeting	Wedding	Weddings 2016	Derek's Magnificent B&B	02/04/2015	01/08/2016	01/10/2016	

4   Click **Responses** in the left menu

5   Click the **+ icon** under the **Actions** column

6   **Lead Information**: View the meeting name, planner, or third party planner contact info.

> **ⓘ Lead Response Protocol**
> - *Always* respond through the Partner Portal.
> - **If the listed contact is an Explore Asheville staff member**: our team will gather offers through the Partner Portal and send them to the meeting planner on your behalf.
> - **If the listed contact is a meeting planner/not Explore Asheville staff**: send your proposal directly to that contact AND attach/submit the proposal to the Partner Portal lead, unless otherwise directed.

7 **Response Information (*required field):**

- ***Pursuing the Lead**: Select Yes/No

- ***Account**: Use the drop-down to ensure you are submitting a response from the correct account

- ***Comments**: Can include details such as reason for rate differences, distance from venue, whether venue is newly-renovated, rate range, parking charges, etc. Keep it brief, bullet points suggested. We do not need a long proposal in this section.

- ***Bureau-Only Comments**: Private comments seen by Explore Asheville staff only. Usually not necessary to add anything.

- **Rate Range**: Enter rate. If the rate differs, please explain the reason in the comments.
  - *For example: Rate Range $149–$199 --> Comment: Weekday Rate: $149, Weekend Rate: $199*

- **Requested Rooms**: Total # of rooms the group is requesting

- **Peak Night Rooms**: Largest # of rooms requested by night

8 **Room Information**: For each date, enter the # of rooms you can offer.
  - If you want to host the entire group, enter the clients requested number here.
  - If you want to host only a portion of the group, enter the number of of rooms you can offer below. This is often the case for all large sporting events.

Room Information

	Sat 09/01/2018	Sun 09/02/2018	Mon 09/03/2018	Tue 09/04/2018	Wed 09/05/2018	Thu 09/06/2018	Fri 09/07/2018
Any	0	0	0	0			
Total	0	0	0	0			
Requested	0	0	0	0			

9 **File Attachment**: Click the blue **ATTACH FILE** button to attach your proposal

File Attachments

Please attach all documents as PDF only.

ATTACH FILE   or drag files to the page

No files have been attached

10 **Sports Groups Only**: This information is needed for sports group only

For Sports Groups Only

Group Rate Code:

Are Rooms Blocked?:
○ YES   ✓ NO

Reservations Phone:

Reservation Cut Off Date:

Is Breakfast Included?:
○ YES   ✓ NO

Extra Person Charge:
$

Website:

Hotel Contact Email:

11 **General**:
- **Electronic Proposal**: Paste the URL of your web proposal if applicable
- **Booking Link**: Paste the URL of your booking link if applicable

General	
Electronic Proposal:	Booking Link:

12 Click **SAVE** in the top left corner

(i) Note: You can edit lead responses until the Response Due Date passes.

SECTION 6: TERMS GLOSSARY

- **Open**: Active lead, awaiting response, deadline not passed

- **Open/Bid Sent**: Response submitted as "Pursuing"

- **Turned Down**: Response submitted as "Not Pursuing"

- **Closed/Decision Pending**: Response submitted, awaiting decision

- **Closed/Lost to Another City**: Lead lost to a different location

- **Closed/Won**: Your property selected

- **Closed/Lost**: Different property selected

- **Closed Cancelled**: Lead cancelled

- **Closed/Won - Properties TBD**: Lead confirmed, but property not yet accepted

- **Assist**: Bookings secured with Explore Asheville's assistance

SECTION 7: HELP AND SUPPORT

(i) For assistance with account access, changing access type, technical issues, and other questions, contact **spearsall@exploreasheville.com**.