

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.

Table of Contents

Section 1	
Understanding Sales Contact Access Types.....	1
Section 2	
Getting Started.....	2
Section 3	
Lead Notifications.....	2
Section 4	
Viewing and Assigning Leads.....	3
Section 5	
Responding to Leads.....	9
Section 6	
Terms Glossary.....	13
Section 7	
Help and Support.....	13

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:

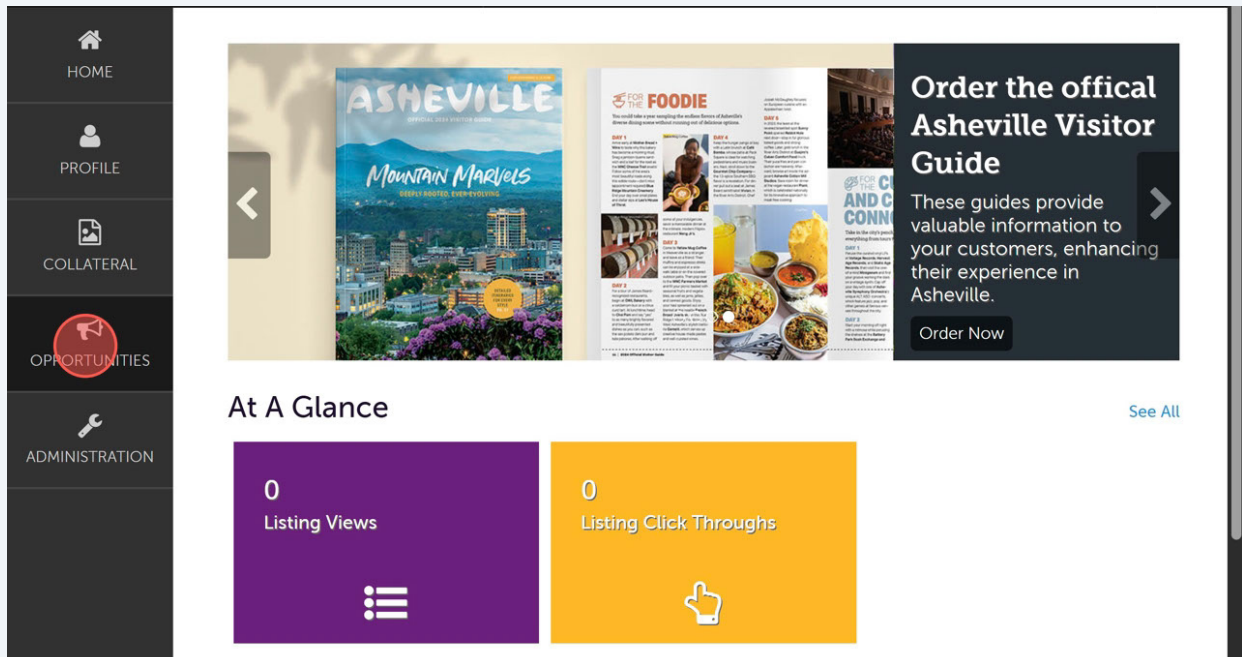
- New sales leads available for review
- Lead status changes to Definite
- Lead status changes to Lost
- Lead status changes to Cancelled

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.

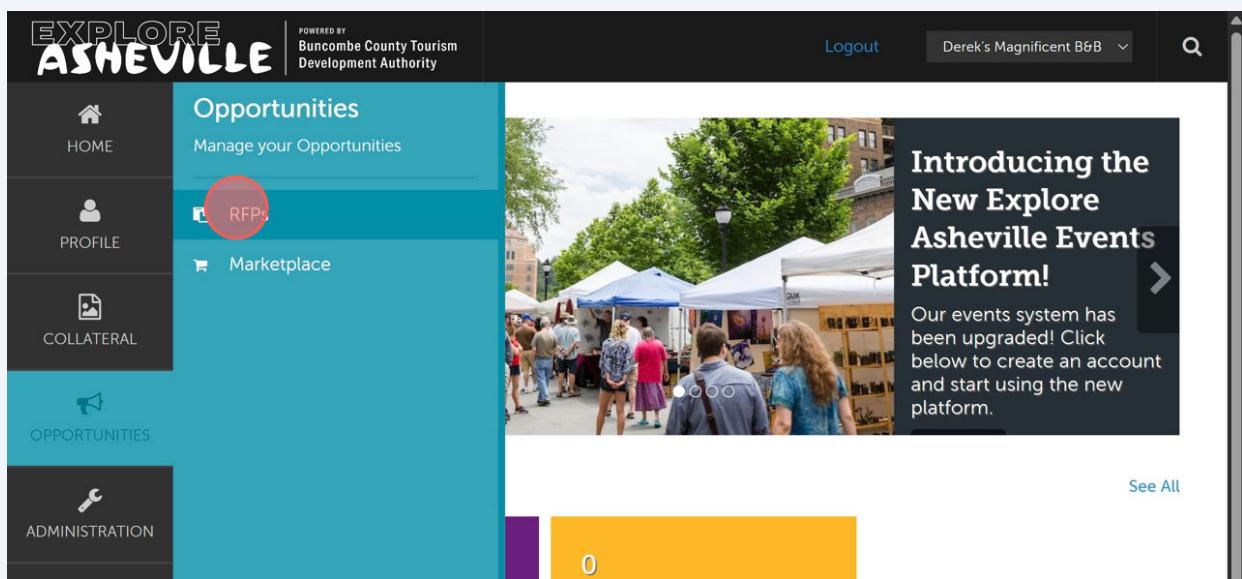
SECTION 4: VIEWING AND ASSIGNING LEADS

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

i 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)

ASHEVILLE Development Authority

HOME
PROFILE
COLLATERAL
OPPORTUNITIES
ADMINISTRATION

RFPs

Filters (0)

Responded is:

Lead Name contains:

Lead ID contains:

Response Date:

-All Dates-

Create Date:

-All Dates-

Organization contains:

Manage Filters

2 Choose Columns or Filters

The screenshot shows the 'RFPs' page in the 'ASHEVILLE Development Authority' system. A sidebar on the left contains navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, and ADMINISTRATION. The main content area is titled 'RFPs' and features a 'Filters (0)' section with various filter options like 'Responded is:', 'Lead Name contains:', 'Lead ID contains:', and 'Group Type is one of:'. On the right, a panel titled 'Columns Filters Ordering' is open, showing a list of available filters. The 'Columns' tab is selected, and the 'Create Date' and 'Group Type' filters are highlighted with green bars. The 'Create Date' filter has a dropdown menu set to '-All Dates-'. The 'Group Type' filter has a dropdown menu set to 'CHOOSE -'.

3 Select desired filters

This screenshot shows the same 'RFPs' page, but with the 'Columns Filters Ordering' panel open to the 'Filters' tab. The 'Filters' tab is selected, and a list of available filters is displayed. The 'Create Date', 'Decision Date', 'Departure (Preferred)', 'Group Type', 'Lead ID', 'Lead Name', and 'Lead Status' filters are all checked with green checkmarks. The 'Lead Status' filter is highlighted with a red circle. The 'Group Type' filter is also highlighted with a green bar. The 'Create Date' filter has a dropdown menu set to '-All Dates-'. The 'Group Type' filter has a dropdown menu set to 'CHOOSE -'. The 'APPLY FILTERS' button is visible at the bottom of the filter section.

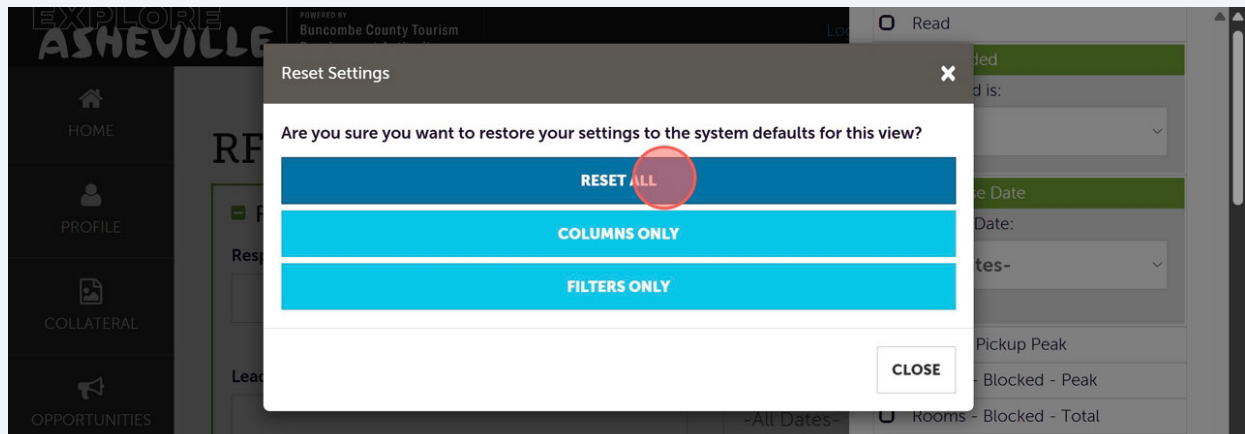
4 Click **Apply Changes**

The screenshot shows a software interface with a dark sidebar on the left containing navigation links: PROFILE, COLLATERAL, OPPORTUNITIES, and ADMINISTRATION. The main area is titled 'Filters (0)' and contains several filter categories: 'Responded is:' with a dropdown menu, 'Lead Name contains:' with a text input field, 'Lead ID contains:' with a text input field, and 'Group Type is one of:' with a 'CHOOSE' button. To the right of these are 'Response Date:', 'Create Date:', 'Organization co', and 'Property Lead St', each with a '-All Dates-' dropdown. A green 'APPLY FILTERS' button is at the bottom left of the filter section. On the right side, there is a list of filter items with checkboxes: Pursuing, Read, Responded (checked), Response Date (checked), Room - Pickup Peak, Rooms - Blocked - Peak, Rooms - Blocked - Total, Rooms - Pickup - Total, Rooms - Requested - Peak, Rooms - Requested - Total, Sales Manager, and Source Code. Below this list are three buttons: 'APPLY CHANGES' (blue, highlighted with a red circle), 'CANCEL' (grey), and 'RESET' (orange).

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

This screenshot shows the same filter settings interface as the previous one. The 'Response Date' filter is now highlighted with a green header. The 'Response Date' dropdown menu is open, showing '-All Dates-' as the selected option. The 'APPLY CHANGES' button is no longer highlighted. Instead, the 'RESET' button (orange) at the bottom right is highlighted with a red circle, indicating the action to revert to original settings.



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


Page 1 of 2 Go to Page: 1

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
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	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	

Assigning Leads (Lead Catchers Only)

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

Page 1 of 2 Go to Page: 1

Actions	Lead ID	Lead Name	Property Lead Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
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2 Click **Responses** in the left menu

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

ADMINISTRATION

Lead Details

PRINT

RETURN

Sections:

- Lead Information
- Meeting Dates
- Room Summary
- Revision Notes
- Responses**
- For Sports Groups Only
- General

Lead Information

Lead ID 34566

Meeting Name 2016 Farlow / Zeiger Wedding

Account Derek's Magnificent B&B

Profile Farlow/Zieger Wedding

Organization Weddings 2016

Organization 36 Montford Avenue

Address Asheville NC 28801

Contact Hannah Farlow

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

PRINT

RETURN

Sections:

- Lead Information
- Meeting Dates
- Room Summary
- Revision Notes
- Responses**
- For Sports Groups Only
- General

Responses

Derek's Magnificent B&B

Status Closed/ No Bid Sent

Currently Assigned None (Assign)

Contracts

PRINT RESPONSE LOG

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
	01/08/2016 - 01/10/2016 **Preferred Date**	01/08/2016 - 01/09/2016		

4 Select assignee, then click **Save**

Assign Contact

Search for Contact:

Search by Name

Derek's Magnificent B&B

Shelby Pearsall

SAVE

CLOSE



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

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

ADMINISTRATION

Introducing the New Explore Asheville Events Platform!

Our events system has been upgraded! Click below to create an account and start using the new platform.

At A Glance [See All](#)

0 Listing Views

0 Listing Click Throughs

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

EXPLORE ASHEVILLE

POWERED BY Buncombe County Tourism Development Authority

Logout

Derek's Magnificent B&B

HOME

PROFILE

COLLATERAL

OPPORTUNITIES

Opportunities

Manage your Opportunities

RFPs

Marketplace

Introducing the New Explore Asheville Events Platform!

Our events system has been upgraded! Click below to create an account and start using the new platform.

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

Page 1 of 2 Go to Page: 1

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

Lead Details

PRINT

RETURN

Sections:

- Lead Information
- Meeting Dates
- Room Summary
- Revision Notes
- Responses**
- For Sports Groups Only
- General

Lead Information

Lead ID 34566

Meeting Name 2016 Farlow / Zeiger Wedding

Account Derek's Magnificent B&B

Profile Farlow/Zeiger Wedding

Organization Weddings 2016

Organization 36 Montford Avenue

Address Asheville NC 28801

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

Responses

Derek's Magnificent B&B

Status Open

Currently Assigned Brit Martin (Reassign)

PRINT RESPONSE LOG

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	02/01/2017 - 02/09/2017	02/01/2017 - 02/08/2017		

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

New Response

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments
- For Sports Groups Only
- General

Lead Information

Lead ID 37411

Meeting Name Test Lead for Training

Organization Asheville Convention and Visitors Bureau

Contact Swims Test

36 Montford Avenue

Asheville NC 28801

UNITED STATES

(828) 258-6110

3rd Party Meeting Planner

Meeting Planner Contact

Additional room requests/needs



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

Response Information

Pursuing This Lead: *Required

☐ NO ☐ YES

Account: *Required

Derek's Magnificent B&B

Comments: *Required

Bureau-Only Comments:

Rate Range:

From

To

Requested Rooms:

0

Peak Night Rooms:

0

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 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: <input type="text"/>	Are Rooms Blocked?: <input type="radio"/> YES <input checked="" type="radio"/> NO
Reservations Phone: <input type="text"/>	Reservation Cut Off Date: <input type="text"/> 
Is Breakfast Included?: <input type="radio"/> YES <input checked="" type="radio"/> NO	Extra Person Charge: \$ <input type="text"/>
Website: <input type="text"/>	Hotel Contact Email: <input type="text"/>

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

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



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