



## MEMBER PORTAL INSTRUCTIONS

Accessing and Responding to:  
Meeting/Group Tour Leads & Service Requests

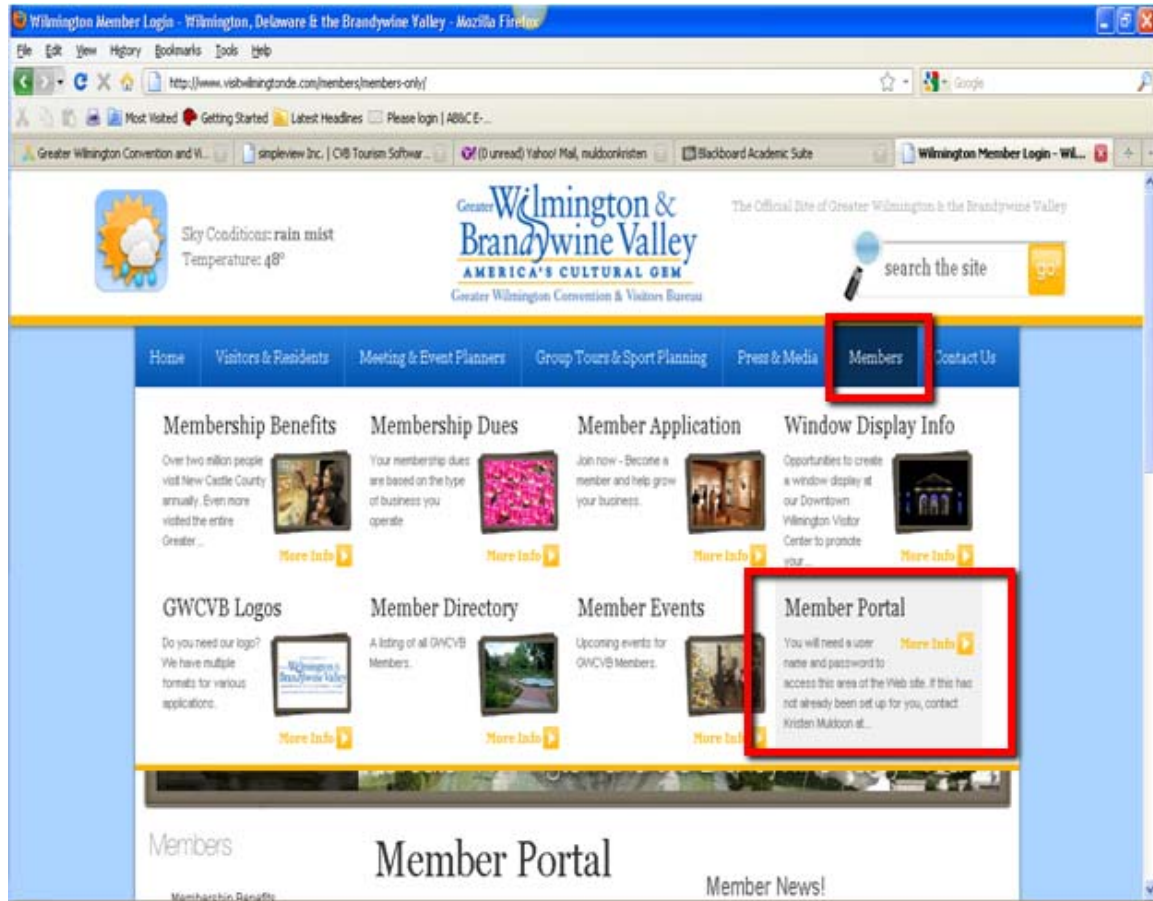
Greater Wilmington CVB  
100 West 10<sup>th</sup> Street, Suite 20  
Wilmington, DE 19801  
**[VisitWilmingtonDE.com](http://VisitWilmingtonDE.com)**

## First Step...Member Login

After receiving your notification e-mail from [gwcvblead@visitwilmingtonde.com](mailto:gwcvblead@visitwilmingtonde.com), indicating there is a LEAD or SERVICE REQUEST pending in the portal for you to review, you will need to login to the GWCVB Member Portal.

**All LEADS and SERVICE REQUESTS are only accessed through the member portal.** You may login to the portal at anytime from the Members' Section of the GWCVB website at: <http://www.VisitWilmingtonDE.com/Members/Member-login/>

Go to Members, then Member Portal:




Then you will see a screen that looks something like the one show on the following page:

Members

- Membership Benefits
- Membership Dues
- Member Application
- Window Display Info
- GWCVB Logos
- Member Directory
- Member Events
- Member Portal

Member Help



# Member Portal

You will need a user name and password to access this area of the Web site. If this has not already been set up for you, contact Kristen Muldoon at 302-295-2217. If you have forgotten your password, utilize the "Forgot Password?" feature below. Login information is case-sensitive.

Username:

Password:

[Forgot Password?](#)

\*Your username is your e-mail address.

### Member News!


- **Member Orientation:** October 19, 2010. [Register now!](#)
- **Joint Holiday CVB Reception:** December 9, 2010 (6-9PM), Mendenhall Inn, PA. Save the date!
- **Next Marketing & Sales Meeting:** January 2011 - Date TBD
- **Missed the September 15, 2010 Marketing & Sales Meeting?** [View presentations here!](#)
- **Window Displays:** Now accepting requests for 2011. Call James Julia (302) 295-2211 or email [JJulia@wilmcvb.org](mailto:JJulia@wilmcvb.org). Windows fill up quickly so get your request in early!
- **Become a fan of the GWCVB on facebook!** We get a great response from users when we post photos! With over 800 fans, we need your images. For more information about Facebook call James Julia (302) 295-2211 or email [JJulia@wilmcvb.org](mailto:JJulia@wilmcvb.org).

After entering your \*Username and Password you will be taken to the Member Portal page shown here:

Members






- Membership Benefits
- Membership Dues
- Member Application
- Window Display Info
- GWCVB Logos
- Member Directory
- Member Events
- Member Portal

Member Help



# Member Portal

### Member Menu

-  [View/Edit Your Profile](#)
-  [View Leads](#)
-  [Service Requests](#)
-  [View Reports](#)
-  [Logout](#)

### Member News!

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- **Become a fan of the GWCVB on facebook!** We get a great response from users when we post photos! With over 800 fans, we need your images. For more information about Facebook call James Julia (302) 295-2211 or email [JJulia@wilmcvb.org](mailto:JJulia@wilmcvb.org).

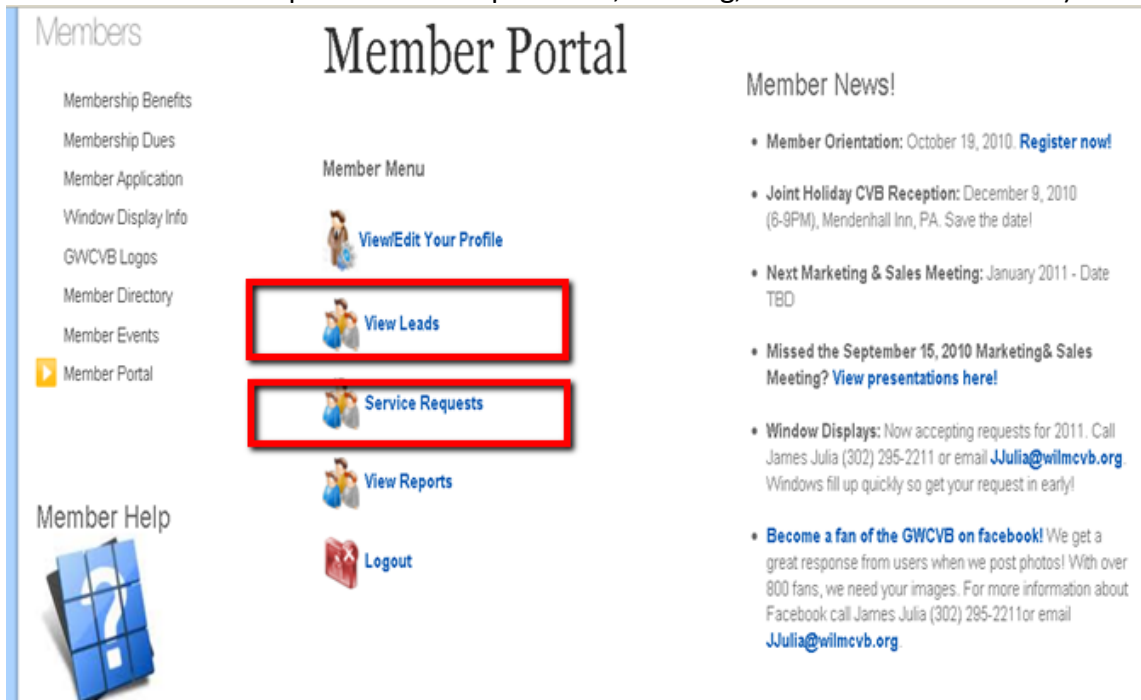
**\*Please note:**

- Username is your e-mail address. Your Initial Password is assigned to you when you are set up to have access to the member portal. It comes to you in an email from [lmckay@wilmcvb.org](mailto:lmckay@wilmcvb.org). If you lose that email or cannot remember your password, you can utilize the "forgot password?" feature on the Member Login page or contact Linda McKay at [LMckay@wilmcvb.org](mailto:LMckay@wilmcvb.org) (302)295-2215.
- When you log in for the first time, you will be prompted to change your system-generated password to a personalized password.

## Second Step...Member Portal

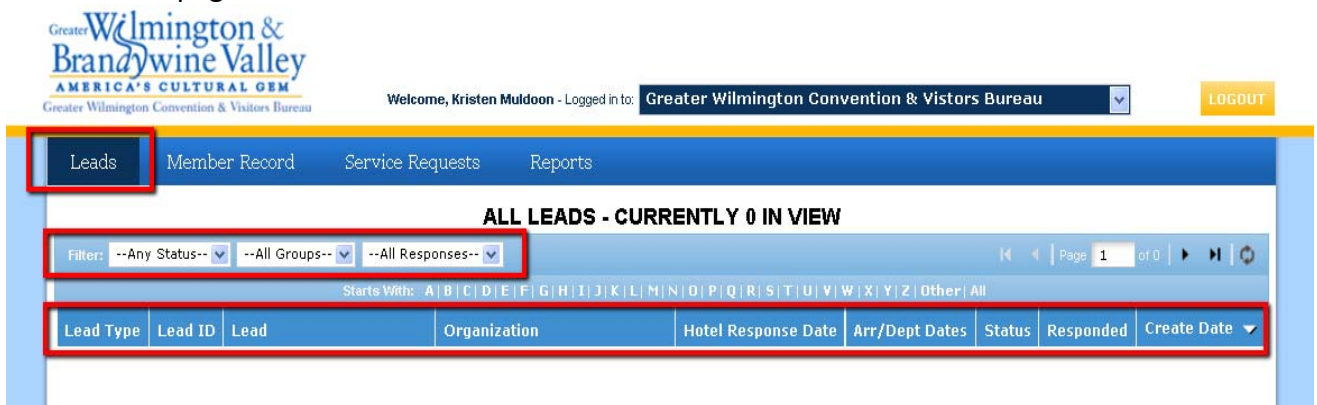
On the Member Portal Page you will find the Member Menu.

- To see your Meeting & Group Tour Leads click on “View Leads”.
- To see your Service Requests click on “View Requests”. (\*Note: Service Requests are leads that pertain to transportation, catering, florists or other services)



### Third Step (3.0)...Viewing Leads

After choosing “View Leads” from the Member Portal page, you will be taken to the “All Leads” homepage shown here:



On this page you can create a custom view of your leads and their current status by utilizing the “Filter” dropdown menus.

#### Important notes:

- Lead Filters include:
  - ✓ -- Any Status -- \*Statuses are defined as:

- -- New -- The “Response Due Date” has not passed. (When a New Lead is available for you, the CVB will send you an email message informing you that you have a new Lead).
- -- Pending -- The member “Response Due Date” has passed (You can view the lead but the Response tab is no longer available. You must call the CVB rep to see if a manual response is possible).
- -- Closed/Won -- Your property/venue won the business.
- -- Closed/Lost -- The Lead is lost, cancelled or is definite but you are not the selected hotel/venue.
- -- Closed/TBD – The Lead has been closed for some reason.
- ✓ -- All Groups – (Meeting or Group Tour)
- ✓ – All Responses – (Yes or No)
- Sorting by – Any Status – will show all leads
- When you login, the Leads will automatically sort by the “Create Date” column in descending order, putting the most recently created lead at the top.
- You are able to sort your Leads by clicking on any of the column headers (i.e. Lead Type, Lead Id, Lead(name), Organization, Hotel Response Date (a.k.a Response Due Date), Arr/Dept. Dates, Status, Responded or Create Date). Clicking once will sort in ascending order (A-Z). Click the same header again will sort in descending order (Z-A).

### Third Step (3.5)...Viewing Service Requests

After choosing “View Service Requests” from the Member Portal page, you will be taken to the “Service Requests” homepage shown below. On this page you can create a custom view of your “Service Requests” and their current status by utilizing the “Filter” dropdown menus.

#### Important notes:

- Service Request Filters include:
  - ✓ -- Any Status -- \*Statuses are defined as:
    - -- New -- The “Response Due Date” has not passed. (When a New Lead is available for you, the CVB will send you an email message informing you that you have a new Lead).

- -- Pending -- The member “Response Due Date” has passed (You can view the lead but the Response tab is no longer available. You must call the CVB rep to see if a manual response is possible).
- -- Closed/Won -- Your property/venue won the business.
- -- Closed/Lost -- The Lead is lost, cancelled or is definite but you are not the selected hotel/venue.
- ✓ -- All Groups – (Meeting, Tour, Media, Misc)
- You are able to sort your Service Requests by clicking on any of the column headers (i.e. Request Type, Request ID, Service Request (name), Contact, Lead (the lead it is attached to), Type, Status, Responded (Yes or No). Clicking once will sort in ascending order (A-Z). Click the same header again; it will sort in descending order.

## Fourth Step (4.0)...Responding to Leads:

To choose the lead you wish to respond to, click on the Lead name. **A new screen will open, which is the “Lead Information” screen.** View the lead information and at the very bottom you will see a “Responses” section. Here you are able to Edit Your Response and View Your Response. (Edit Your Response is what you will use to identify whether or not you will be pursuing the lead). You are also able to Print the Lead, or Return to the List of Leads. When you click on Edit Your Response, you will see a field “Pursuing this lead?” Here you will select Yes or No. You can then add general comments and Bureau-Only Comments. Enter your Rate Range, Requested Rooms, Peak Night Rooms and any other Room Information. Attach files if you need to. Then Save your Response. If you select Return to Lead before you Save, the information you’ve entered will not be saved. **\*Note:** If the Response Due Date has passed, you will not be able to respond to the lead.

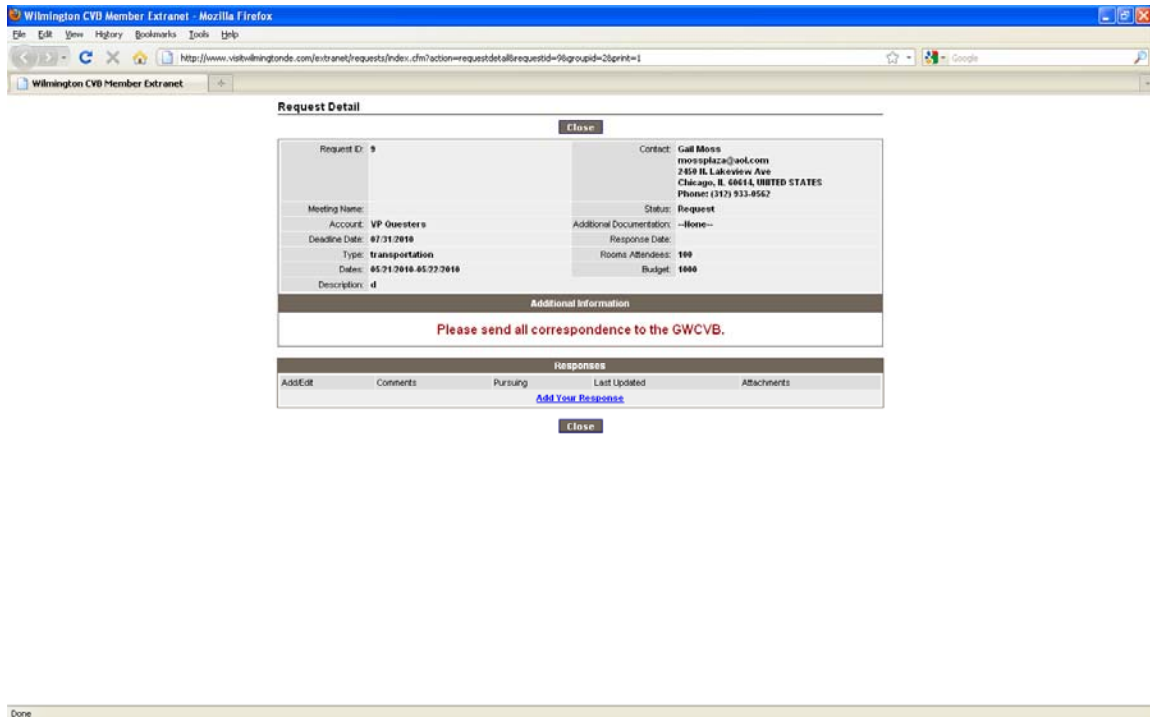
Under the “Responded” column on the “All Leads” home page, you can now see that you have responded to this lead. You can go back into any lead (provided the response due date has not passed) to “Edit Your Response” if needed.

### Important notes:

- You should contact and send your proposal to the client directly in addition to indicating your response in the Member Portal, unless information in the lead detail directs you otherwise. (i.e. - A client will request the GWCVB collect proposals and submit as one proposal not multiple proposals.)
- If the “preferred method” of contact is e-mail, click on the client’s e-mail address to send your response.
- If you choose not to respond to the lead, click no and indicate a reason (no available space, can’t meet desired rate, etc).
- **ATTACHED FILE:** If a meeting client provides a file related to the lead, you will find an attachment when you open the “Lead Detail” page. If View/Download File appears next to “Meeting Specification Files”, click the link to view the file. If file is not attached, you will see “ – None –”.
- **Response to CVB: a brief note with the date you responded to the client, and some brief text explaining the result of your contact. YOUR RESPONSE IS NEVER VIEWABLE BY ANOTHER MEMBER AND IS KEPT CONFIDENTIAL BY THE GWCVB. Please create an entry each time you attempt contact with the client).**

Examples:

- E-mailed client info/proposal 8/12/09 LM
- Followed up with client 9/12/09 LM
- Booked business for 1/1/10 LM



**TIP:** Indicate the date of the entry with your initials – it may help later when adding additional info or if you have more than one sales person viewing the same lead.

## Fourth Step (4.5)...Responding to Service Requests:

After choosing the Service Request you wish to respond to, click on the Service Request Name. **A new screen will open, which is the “Request Information” screen.** Review the service request information then respond and fill in the appropriate information. Don't forget to click Save. **\*Note:** If the Response Due Date has passed, you will not be able to respond to the request.

Under the “Responded” column on the “All Requests” home page you can now see that you have responded to this Service Request and have the ability to “Edit” and “View Your Response” if needed.

### Important notes:

- You should contact and send your response to the client directly in addition to indicating your response in the Member Portal, unless information in the Request Detail directs you otherwise. (A client will request the GWCVB collect requests and submit as one request, not multiple requests.)
- If the “preferred method” of contact is e-mail, click on the client’s e-mail address to send your response.
- If you choose not to respond to the request, click no and indicate a reason (dates not available, can’t meet desired rate, etc).

- **ATTACHED FILE:** If a client provides a file related to the Service Request, you will find an attachment when you open the “Request Detail” page. If a file appears next to “Additional Documentation”, click the link to view the file. If file is not attached, you will see “ – None –”.
- **Response to CVB:** a brief note with the date you responded to the client, and some brief text explaining the result of your contact. **YOUR RESPONSE IS NEVER VIEWABLE BY ANOTHER MEMBER AND IS KEPT CONFIDENTIAL BY THE GWCVB. Please create an entry each time you attempt contact with the client).**

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**TIP:** Indicate the date of the entry with your initials – it may help later when adding additional info or if you have more than one sales person viewing the same Service Request.

## **FAQ**

### **The System:**

Now you can access and update your information 24/7, 365! This CRM system is web based – you can access from anywhere. It is used to communicate the needs of clients with our member properties who can service their needs for an upcoming tour, meeting, reunion or convention.

### **Where do the leads come from?**

Tradeshaw meetings, website, client phone/e-mail inquires, sales calls, prospecting... several ways that the GWCVB has contact with clients every day.

### **How many leads will my property receive?**

The number will vary for every member. The CRM leads are customer-centric, meaning the GWCVB tried to match the needs of the client with the members who can service those needs – on as broad basis as possible. For example, if a client has their lodging secure but needs a dining venue; the lead will primarily be sent to dining properties. It won't be sent to lodging, attractions, etc., (unless the client has specifically requested or has needs in line with these property types). The client may be very broad or very specific in their needs and the leads are distributed accordingly.

### **What if I forgot my password?**

Click on “Forgot Password”

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Username:

Password:

[Forgot Password?](#)

Contact the Director Of Membership if you have any issues logging on.

Linda McKay

[lmckay@wilmcvb.org](mailto:lmckay@wilmcvb.org)

(302) 295-2215

**What if there are additional contacts at my organization that need to be able to view leads?**

If there are other people at your organization who need to have access to the portal to view and respond to leads, contact Linda McKay [lmckay@wilmcvb.org](mailto:lmckay@wilmcvb.org) so that Linda can assign access to those contacts.

**Do the leads ever go away or get archived somewhere?**

No. All leads that have been sent to you will always remain in the portal. You can utilize the "view" dropdown if you want to be selective with which leads you are viewing.