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# Partner XtraNet Training Manual

Updated Feb 2014

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## **PARTNER INFORMATION**

iDSS defines a Partner as any organization that receives leads from a **Destination Marketing Organization (DMO)** or Convention & Visitors Bureau. The iDSS Partner XtraNet is available to you 24 hours a day, 7 days a week, anywhere you have an internet connection. Your DMO (or CVB) will assign leads to your location. You can then login to the iDSS system to either accept or decline the leads. This system can replace faxes, emails and phone calls between you and your DMO regarding leads. When your DMO sends you a lead, you will receive an email notification in your email box notifying you to login to the iDSS system to view your lead.

## **SUMMARY OF STEPS TO RESPOND TO LEADS**

Below is a summary list of steps to working leads in the iDSS system. Detailed descriptions of each step, including screenshots, follow in the rest of the manual.

### **STEP 1 – EMAIL NOTIFICATION OF RECEIVED LEAD**

You will receive an email from lead.administrator@idss.com informing you that you have received a lead and to login to the iDSS system to accept or decline the lead.

### **STEP 2 – LOGON TO IDSS TO ACCEPT OR DECLINE LEAD**

Go to the website <https://cvb.idssasp.com>. Enter the username and password assigned to you.

### **STEP 3 - VIEW YOUR HOME PAGE/LEAD ACTIVITY QUEUE**

Your first step after logging in should be to read all items in your Lead Activity Queue, then go to the Leads Menu and click on My Leads and work on any new leads that have arrived, or ones that have not been responded to.

### **STEP 4 – ASSIGN LEADS \*\*ONLY DONE BY LEAD ADMINS\*\***

Click on the Respond Link by the name of the Event to view the lead. The Partner Admin's have the ability to accept and decline leads without assigning them to anyone. We highly recommend Partner Admins assign every lead. You can assign leads to yourself also.

### **STEP 5 – VIEW YOUR LEADS**

To see the leads assigned to you, click on the Leads menu option and select My Leads or go to your Home Page to the Assigned Leads Section.

### **STEP 6 – RESPOND TO THE LEAD**

Click on the Respond Link to the far right of each lead to see lead details and respond to the lead.

### **STEP 7 – SUBMIT A BID**

Click on the Respond under the Bid Submission area for each set of dates to see specific lead information. Fill in the required fields and click Save. If you want to decline this part of the lead, click

Decline . Click Accept  to accept the lead.

### **STEP 8 – DECLINE A LEAD**

You can decline a lead from two different screens. You can click on the Decline Lead button in the Bid Submissions area, or you can click into the Bid Submission area by clicking on the Edit button. The Accept, Decline and Save buttons will be at the top of the screen. Both choices will bring you to a dropdown list where you choose the reason why you are declining the lead and an area to add any special notes. Then click the Submit button and the DMO is then notified that you declined this lead and can read your reason for declining.

### **STEP 9 – SEARCHING FOR A LEAD NOT ON HOME PAGE**

To search all of your received leads, you can use the search filters above the lead area. Select your search criteria by clicking on the dropdown arrows or calendar icons to set your choices and then click the Search button. Your search results will appear at the bottom of the screen.

### **STEP 10 – ENTER CONTRACTED & PICKUP NUMBERS**

Contracted and Pickups can be entered after the event has happened. The hotel can enter rooms that they "picked up" on the event, over and above the original contracted number. After the event has happened, and the DMO has closed the lead, the hotel can come in to the Room Flow Detail screen. You can enter the numbers for each day, then click Save/Pending. The DMO can then see the numbers.

## **STEP 1 – EMAIL NOTIFICATION OF RECEIVED LEAD**

You will receive an email from [lead.administrator@idss.com](mailto:lead.administrator@idss.com) informing you that you have received a lead and to login to the iDSS system to accept or decline the lead. You will have to login to the iDSS system to respond to the lead. Example Notification:

**From:** lead.administrator@idss.com [mailto:lead.administrator@idss.com]

**Sent:** Monday, November 27, 2006 7:25 AM

**To:** Your Name

**Subject:** A Lead(s) has been delivered to you

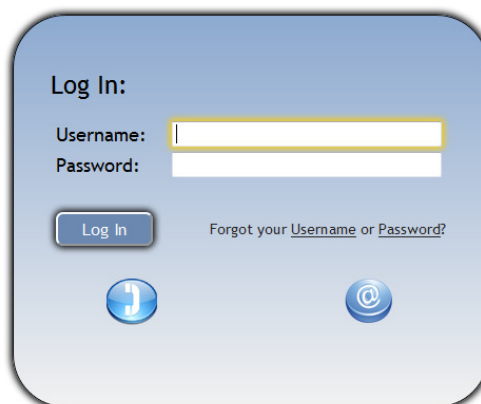
Login to see details: [cvb.idssasp.com](http://cvb.idssasp.com)

You can also receive an email like the one above but the entire lead document will show within the body of the email for you to review. The Destination Marketing Organization (DMO) has the ability to send either type of email notification.

## **STEP 2 – LOGON TO IDSS TO ACCEPT OR DECLINE LEAD**

Go to the website <https://cvb.idssasp.com>

Enter the username and password that has been assigned to you. If you do not have a login name or password, please contact your DMO. Click the log on button. This will bring you to the home page and Event Activity Que. Once you are logged on to the system, you will stay logged on until you log off or exit the internet browser (Internet Explorer or FireFox). **\*\*\*The Password is case sensitive, the User Name is not\*\*\***

A light blue rounded rectangular form with a white border. At the top left, it says "Log In:". Below this are two input fields: "Username:" and "Password:". To the right of the "Password:" field is a link that says "Forgot your Username or Password?". Below the input fields is a blue button with white text that says "Log In". At the bottom of the form are two circular icons: one with a blue 'i' and one with a blue '@'.

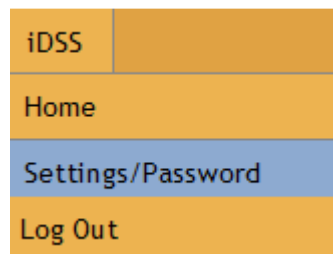
If you forget your password, click the Forgot Password? Link and the screen below will open. Enter your user name and click Retrieve. The screen will refresh and inform you that the password was sent and to what email address.



A light blue rounded rectangular form with a white border. At the top left, it says "Send a Password Reminder:". Below this is a label "Enter your Username or Email Address:" followed by a single-line input field. Below the input field is a blue button with white text that says "Send". To the right of the button is a link that says "Return to the iDSS Home Page.". At the bottom of the form are two circular icons: one with a blue 'i' and one with a blue '@'.

If an employee using the iDSS system leaves your business, please notify your DMO immediately so their login name and password can be inactivated. If you hire a new employee that needs to use the iDSS system, also notify your DMO so a login name and password can be established for them. If you do not know your login name, please contact your DMO directly or email [support@idss.com](mailto:support@idss.com).

**\*\*Please reassign all leads to the new person before the old person is inactivated.**

## Change Your Password



First Name	Last Name	Account	Sender Account Name	Username	Password		
Jack	Johnson	iDSS Partner 2	iDSS Hotel CVB	jack@demo	***...	 	<a href="#">Email Login to Contact</a>

Go to iDSS > Settings/Password to change your own password to the system. Click on the edit button to change your password and click save. Click on the Email Login to Contact button to email yourself your username and password. Click on the Green arrow next to the edit button to go back to your home page.





You can also change your Home Page settings by checking “Collapsed” on any section. When you go to your Home Page, you will still see the section but it will be collapsed and you will have to click the “+” sign to expand it. You can also change the paging size up from 10 to 20 if you want to see more in each section at one time.

Home Page Settings				Save
Section Name		Collapsed	Page Size (Limit 20)	
Report Section		<input type="checkbox"/>	10	
Lead Activity Queue Section		<input type="checkbox"/>	10	
Unassigned Open Leads Section		<input type="checkbox"/>	10	
My Open Leads Section		<input type="checkbox"/>	10	
Pickup Information Needed Section		<input type="checkbox"/>	10	
File Section		<input type="checkbox"/>	10	

## Multiple Logins Feature

If you have more than one login to iDSS, go to iDSS > Switch To... to switch between your different logins and go to your Home Page. This feature will only work if you receive leads for more than one account from the same CVB. The system is looking at your contact record's email address. If the system finds more than one contact record with the same email address and the contact record has a login to the system, you will see each of them here.

iDSS
Home
Settings/Password
Log Out
Switch To - Fake Hotel
Switch To - Training CVB
Switch To - Washington Council

Displaying Users 1 thru 4							
First Name	Last Name	Account	Sender Account Name	Username	Password		
Shelly		Fake Hotel	Training CVB	shelly12345	***...		Email Login
Patsy	Cline	The Marriott Hotel	Training CVB	PIAdmin@training	***...		Email Login
Training Manager	iDSS	Training CVB	Training CVB	manager@training	***...		Email Login
Steve	Smith	Washington Council	Training CVB	steve@wacouncil.com	***...		Email Login

Under IDSS>Settings/ Password, you will see if you have more than one login and be able to change the passwords for each login on this screen and be able to switch to any home page by clicking on the Green arrow.

## STEP 3 - VIEW YOUR HOME PAGE

This is the first screen that you see after logging in. This is where you will see update notes that indicates any changes in status, or updates on leads that have already been assigned to you. To go into the lead, click on the Go To lead button to the right of each note. A note is issued by the DMO when the status of the event changes or a note is added to the lead.

Your first step after logging in should be to read all items in your Lead Messages.

**The notes stay on the Lead Messages until you have checked the Close Note box and click Refresh.** You can search the notes to see a different set of dates by altering the start and end date. Click on the calendar icon next to Start Date and End Date and choose the correct date. Then click on the Refresh button to the right of the dates and the list of notes will regenerate. There is no way to delete notes in your Lead Messages.

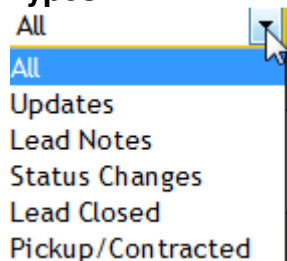
To close all of your Messages at the same time, click the Select All button, then Refresh. This will close all your Messages at the same time. Click on Select Page to select just the three messages shown and close just those three by clicking Refresh

These are notes related to leads assigned to you. Please read the notes then check the "Close Note box" and then Refresh after reading the notes.

73 Lead Messages				Note Type	All	<input checked="" type="checkbox"/> Open Notes Only		Select Page	Select All	Refresh
Date	Type	Event	Account	Notes			Close Note	Action		
2/12/2014 2:52 PM	Lost Opportunity	2014 Tradeshow Space	Tara Meeting Group	the client has selected another location for their training event due to the price of travel. thank you for your help!			<input type="checkbox"/>	Go To Lead		
2/12/2014 2:43 PM	leadnote	2014 Annual Meeting	Tara Meeting Group	Partner Selections have been confirmed for: 2014 Annual Meeting (Accommodations - 2/12/2014). Your selection status is: Not Selected			<input type="checkbox"/>	Go To Lead		
2/12/2014 2:28 PM	Definite	2014 Annual Meeting	Tara Meeting Group	The client has selected the alternate Dates as the Confirmed event Dates. The headquarter and overflow hotel will be notified here soon, thank			<input type="checkbox"/>	Go To Lead		

<<First <Prev Page 1 of 25 Next-> Last->>

**You can sort your Notes by Note Type.** Select the type of Note you want to view from the dropdown list and the screen will refresh to only show those Note Types.



**Click on the Go To Lead Button** to see the Lead updates/notes sent to you. To get back to the Lead Messages at any time, click on the iDSS tab and select HOME.

## STEP 4 – ASSIGN LEADS **\*\*ONLY DONE BY LEAD ADMINS\*\***

There are two different types of roles for Partners. Your DMO will assign those roles to the users at your organization. There is the “Lead Administrator” and the “Lead User”. Both roles work and look the same, except that the Lead Administrator receives all leads sent to the partner, then assigns them to individuals (or self) at the organization. The Lead Administrator at your location will have one extra menu button called Assign Leads.

An Admin has additional permissions beyond the User level. The Admin has access to ALL of the leads sent to their organization, unless a certain lead was sent directly to an individual assigned to receive Venue or Accommodations leads. The Admin can respond (accept or decline) to all leads and then search all the leads to see if they have been read and can reassign them if necessary.

After logging on, go to the Unassigned Open Leads on your home page.

Unassigned Open Leads												Assign Selected Leads To: <span>-Select User-</span> <input type="checkbox"/> Notify Assigned User Via-Email <span>Assign</span>	
All	Lead Date	Account Name	Event	Start Date	End Date	Event Type	Event Status	Peak Rooms	Lead Status	Lead Type	Respond By	Info	Action
<input type="checkbox"/>	2/12/2014	Tara Meeting Group	2014 Tradeshaw Space	07/01/2014	07/04/2014	Meetings	Lost Opportunity	0	Open	Facility/Venue Space	2/19/2014	?	<span>Go To Lead</span>
<input type="checkbox"/>	2/10/2014	Kristen Meeting Group	2014 Tradeshaw	08/01/2014	08/04/2014	Meetings	Tentative	500	Open	Facility/Venue Space	2/17/2014	?	<span>Go To Lead</span>

Click on the “Go To Lead” button to view the lead. **The Lead Admin's may have the ability to accept and decline leads without assigning them to anyone. We highly recommend Lead Admin's assign every lead. You can assign leads to yourself also. You will NOT be able to respond to a lead if it is not assigned to anyone if the DMO Sending you the lead chooses to use that setting.**

To assign the lead, click the dropdown arrow at Assign Selected Requests to: where it says Select User, and select the person from the dropdown list that the Lead is to be assigned to. Then click the open box to the left of the lead you are assigning (Under the word ALL), and then click Assign. The screen will refresh and the lead will leave this screen and go to the user's screen. If you want to send an email to that person when assigning the lead that notifies them they have a lead, check the box Notify Assigned User Via-Email and an email will be sent to the person's email address listed in their contact information via their email program such as Outlook.

Unassigned Open Leads												Assign Selected Leads To: <span>-Select User-</span> <input type="checkbox"/> Notify Assigned User Via-Email <span>Assign</span>	
All	Lead Date	Account Name	Event	Start Date	End Date	Event Type	Event Status	Peak Rooms	Lead Status	Lead Type	Respond By	Info	Action
<input checked="" type="checkbox"/>	2/12/2014	Tara Meeting Group	2014 Tradeshaw Space	07/01/2014	07/04/2014	Meetings	Lost Opportunity	0	Open	Facility/Venue Space	2/19/2014	?	<span>Go To Lead</span>
<input checked="" type="checkbox"/>	2/10/2014	Kristen Meeting Group	2014 Tradeshaw	08/01/2014	08/04/2014	Meetings	Tentative	500	Open	Facility/Venue Space	2/17/2014	?	<span>Go To Lead</span>



You can also re-assign leads or check on other leads assigned to other people. Go to Search > Reassign Leads.

Search
My Leads
Reassign Leads

Search				Search	
Assigned User	piadmin@training			Lead Status	Open
Lead Date	From: <input type="text"/>	To: <input type="text"/>	Lead Type	- No Filter	
Respond By	From: <input type="text"/>	To: <input type="text"/>	Event Type	- No Filter	
Start Date	From: <input type="text"/>	To: <input type="text"/>	Event Status	- No Filter	
End Date	From: <input type="text"/>	To: <input type="text"/>	Account Name	<input type="text"/>	
Selection Status	Unspecified				

To reassign leads, search for the lead by using the Search filters shown above, such as a range of dates, all open leads, specific person's name, etc. Once the lead is found, check the check box to the left of the lead and change the drop down box to the person you are reassigning to, and click Assign. The lead will go to the new person.

To check another user's leads, use the Search filters to choose the person you are looking at (Assigned User), then enter a Lead Date range, change the lead status from Open to No Filter to see all of the leads and click Search. The screen will refresh and all of that person's leads will come up.

## STEP 5 – VIEW YOUR LEADS

To see leads assigned to you, go to the section of your Home Page>My Open Leads.

My Open Leads													
Lead Date	Account Name	Event Name	Start Date	End Date	Event Type	Event Status	Peak Rooms	Lead Status	Selection Status	Lead Type	Respond By	Info	Action
2/12/2014	Tara Meeting Group	2014 Annual Convention	11/10/2014	11/15/2014	Meetings	Tentative	500	Open	Pending	Accommodations	2/19/2014	?	<a href="#">Go To Lead</a>
2/12/2014	Tara Meeting Group	2014 Tradeshow	08/01/2014	08/04/2014	Meetings	Tentative	500	Open	Pending	Accommodations	2/19/2014	?	<a href="#">Go To Lead</a>
2/12/2014	Tara Meeting Group	2014 Annual Convention	11/15/2014	11/18/2014	Tour	Tentative	500	Open	Pending	Accommodations	2/19/2014	?	<a href="#">Go To Lead</a>
2/10/2014	Kristen Meeting Group	2014 Annual Convention	10/25/2014	10/28/2014	Meetings	Tentative	500	Open	Pending	Accommodations	2/17/2014	?	<a href="#">Go To Lead</a>

Click on the Go To Lead button for each lead in order to accept or decline the lead. You can also see the exact same thing by going to Search > My Leads.

Search

My Leads

Reassign Leads

The screen opens to the default setting of showing all OPEN leads assigned to you. Once on that screen, there is two sections. The top half is for searching for any leads (current or past). You can search for the leads assigned to you using the Search options on the top portion of the screen. The search option is described in Step 9.

Search

Search

Assigned User

piadmin@training

Lead Date

From:

To:

Respond By

From:

To:

Start Date

From:

To:

End Date

From:

To:

Selection Status

Unspecified

Lead Status

Open

Lead Type

- No Filter

Event Type

- No Filter

Event Status

- No Filter

Account Name

My Open Leads

Lead Date	Account Name	Event Name	Start Date	End Date	Event Type	Event Status	Peak Rooms	Lead Status	Selection Status	Lead Type	Respond By	Info	Action
2/12/2014	Tara Meeting Group	2014 Annual Convention	11/10/2014	11/15/2014	Meetings	Tentative	500	Open	Pending	Accommodations	2/19/2014	?	<a href="#">Go To Lead</a>
2/12/2014	Tara Meeting Group	2014 Tradeshow	08/01/2014	08/04/2014	Meetings	Tentative	500	Open	Pending	Accommodations	2/19/2014	?	<a href="#">Go To Lead</a>
2/12/2014	Tara Meeting Group	2014 Annual Convention	11/15/2014	11/18/2014	Tour	Tentative	500	Open	Pending	Accommodations	2/19/2014	?	<a href="#">Go To Lead</a>

The bottom half of the screen called My Open Leads shows you all open leads assigned to you that need to be responded to. Leads will stay here as long as the Lead Status is Open and you have not responded to the lead. Once you respond to the lead, or the lead is closed by the DMO, the lead is not deleted from your system. You can search for that lead by using the Search options at the top of the screen.

**Lead Date:** This is the date the lead was issued from the DMO.

**Account Name:** This is the name of the client Organization described in the lead.

**Event Name:** This is the name of the specific meeting or event the DMO is interested in booking.

**Event Status:** This indicates whether the lead is a Lead, Tentative, Definite, Lost Opportunity or Canceled.

**Peak Rooms:** If there is a Room Block Commitment for this lead, it will show the peak number of rooms requested by this group on peak night for this event.

**Lead Status:** This shows the status of the lead. It will list either Open, Closed, Accepted, or Declined. In the event a lead is closed, you are no longer able to respond to the room flow area on the lead, but you can still correspond with the DMO via notes on that lead. Partial means you have accepted some of the dates but not all of them (if more than one set of dates). Mixed means you have accepted AND declined dates sets within a lead that contains more than one set of dates.

**Lead Type:** This shows the type of lead: Acc = Accommodations, fvs=Facility Venue Space

**Respond By:** This is the date that any response is due back to the DMO or client.

**Info:** This button is called a mouse over. By moving your mouse over the question mark (?), you can view the Sales Rep Name, City Name, where the event will be held, the type of lead, and the type of service requested.  
**VIEW:** The View Link brings you in the Lead Details screen.

## STEP 6 – RESPOND TO THE LEAD

Click on the Go To Lead button to see lead details and respond to the lead.

All	Lead Date	Account Name	Event	Start Date	End Date	Event Type	Event Status	Peak Rooms	Lead Status	Lead Type	Respond By	Info	Action
	2/12/2014	Tara Meeting Group	2014 Tradeshow Space	07/01/2014	07/04/2014	Meetings	Lost Opportunity	0	Open	Facility/Venue Space	2/19/2014		Go To Lead

**PLEASE RESPOND TO EVERY LEAD BY EITHER ACCEPTING THE LEAD OR DECLINING THE LEAD BEFORE THE RESPOND DATE.**

You will then be brought to the Lead Details Screen shown below.

Lead
Lead Document
Click the dropdown list to see all available reports you can print regarding this lead.

Lead Sent 2/12/2014
Event Status Tentative
Status Date 2/12/2014

Bid Submissions

Accommodations - Open
Selection Status - Pending
Decline All Dates
Submit Bid Below

Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Action
Option 2		11/10/2014	11/14/2014	Not Submitted	Open	Respond To Lead

These are notes related to this lead. If you want to communicate directly with the Sales Person that sent you this lead click the "Send Note" button and then save your note. These notes are private between you and the sales person. If you need to change a response or send additional information you can do so with a note, or attach a document below in the Attach a File section.

Notes
Send Note to DMO Sales Rep

2/12/2014
Accommodations Lead Type was assigned to PIAdmin@training

Attach any file type you want and as many files as you want as long as each one is 10MB in size or less. The Sales Person who sent you this lead will receive these files immediately. See the File section below for any files the Sales Person has sent for you to review as well.

Attach A File
Attach

File
Browse...
File Description

\* There is a 10MB file size limit.

File - Displaying 1 thru 3 of 3 records.

File	Description	Uploaded By	Uploaded Date	Action
LeadUpdate.pdf	EventLeadID=209606	leadupdatepdfcreator	2/12/2014	

This is where you view and interact with the DMO regarding the lead.

You will see at the top of the screen the date the lead was sent, the event status and the status date. The Bid Submissions area is where you will find any room block information for Accommodations leads. The Facility/Venue Space area is where all venue lead information is recorded.

**Notes** - This is where you can communicate privately back and forth with the DMO. You will see all of the comments/notes the DMO has sent on this lead, and the notes you have sent. To send a note, click the ADD button and a dialogue box opens to allow you type in the note. Click Send when your note is complete. These comments/notes are not seen by the other partners; they exist in your Lead only.

Notes		Send Note to DMO Sales Rep
2/12/2014	Accommodations Lead Type was assigned to PIAAdmin@training	

You can click on the “Send Note to DMO Sales Rep” button to add a Note to the lead at any time. The note will appear on the home page of the person who sent you the lead the next time they login to iDSS.

**File Attachments** - This is where you can attach files to send to your DMO or they can send files to you. These files can be any format as long as they are 10 MB or less. These files will always be saved with this lead. You can delete an attached file ONLY if you are the one who attached it AND only within 7 days of attaching the file. This allows you to delete files that you have uploaded by mistake.

Attach A File				Attach
File	Browse...	No file selected.	File Description	
* There is a 10MB file size limit.				

File - Displaying 1 thru 2 of 2 records.				
File	Description	Uploaded By	Uploaded Date	
LeadDocument.pdf	EventLeadID=209519	leaddocpdfcreator	10/29/2013	
USAWBidApplication2014.pdf	USA Bid application	student16@training	10/29/2013	

View as PDF - By clicking on View as PDF [View As PDF](#) , the lead document will open up in Adobe Acrobat.

## STEP 7 – SUBMIT A BID

The Bid Submissions section will appear if there is a room block or venue details attached to this lead. If there is a room block, this section will show you the dates for the first and last room dates, whether or not it has been submitted, and the date submitted. **Click on the “Respond To Lead” button to view the Bid Submission information.** If there is more than one date option for this lead, there will be a “Respond To Lead” button next to each set of dates. You will need to respond to each set of dates individually.

If you want to decline this bid submission, click on the Decline All Dates button **Decline All Dates**. The system will then ask for a reason for the decline. How to decline leads is explained in greater detail later in Step 8.

Bid Submissions						
Accommodations - Open			Selection Status - Pending		<b>Decline All Dates</b> Submit Bid Below	
Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Action
Option 2		11/10/2014	11/14/2014	Not Submitted	Open	<b>Respond To Lead</b>

The specific lead detail is where you will see specific lead information on Facility & Venue Space leads. This is different lead information from the Accommodations leads.

Bid Submissions						
Facility/Venue Space - Open			Selection Status - Pending		<b>Decline All Dates</b> Submit Bid Below	
Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Action
Fixed Date		7/1/2014	7/4/2014	Not Submitted	Open	<b>Respond To Lead</b>

Click on the “Go To Lead” button to see specific information. Fill in the required fields and click Save. If you want to decline this part of the lead, click Decline **Decline**. Click Accept **Accept** to accept the lead. The Pending Save button just saves what you have typed so you can come back to it later if needed. This button does NOT submit a response.

Fixed date - 11/1/2014 - 11/4/2014 - Open			Copy From: Unspecified	<b>Pending Save</b>	<b>Accept</b>	<b>Decline</b>
Date	Day	Meeting Requirements	Availability	Partner Comments		
11/1/2014	Sunday		Complete			
11/2/2014	Monday	Olympic or professional size ice rink; min. of 600 seats; 3 locker rooms.	Complete			
11/3/2014	Tuesday		Complete			
11/4/2014	Wednesday		Complete			

Lead Requirements		
Requirement	Comments	Response
Venue Rates:		

You can respond to each day of a Facility/Venue lead separately. You can accept or decline the all or part of the daily venue requests by choosing ‘Complete’, ‘Partial’ or ‘Not At All’ by selecting the appropriate dropdown under the ‘Availability’ column.

**\*You will need to respond to both the Accommodations and Facility/Venue Space leads separately if the lead sent to you contains both Bid Submission areas.**

If the Lead DOES NOT have an Room Block Commitment, you will simply click the Accept Lead button (or Decline Lead). The Accept Lead button is only visible if there are no Room Block Commitment's.

Lead Document

Lead Sent: 9/26/2013 | Event Status: Tentative | Status Date: 9/26/2013

Bid Submissions

Facility/Venue Space - Open | Selection Status - Pending | Decline All Dates | Accept Lead

Notes

9/26/2013	Facility/Venue Space Lead Type was assigned to PAdmin@training
9/26/2013	Accommodations Lead Type was assigned to PAdmin@training

Attach A File

File: Browse... No file selected. | File Description: | Attach

## Completing the Room Block Commitment (RBC)

Click on the Respond Link to get to the Room Flow Detail Screen.

Fixed date - 11/1/1914 - 11/3/1914 - Open | Copy From: Unspecified | Pending Save | Accept | Decline

Guaranteed: No | 0 % | Price Year: | Flat Pricing | Itemized Pricing | Holding

	Flat	Single	Double	Triple	Quad	Suite
Rack Rates	0.00	0.00	0.00	0.00	0.00	0.00
Proposed rates	0.00	0.00	0.00	0.00	0.00	0.00

Option: 0 | Total Revenue: 0.00 | Rooms per Day: 0 | Auto Fill Rooms

Request/Available | Total Blocked | Blocked by Room Type

	Need	%	Blocked	Single	Double	Triple	Quad	Suite	Contracted	Pickup
Sun 11/1/1914	500	100.0000	0	0	0	0	0	0	0	0
Mon 11/2/1914	500	100.0000	0	0	0	0	0	0	0	0
Tue 11/3/1914	200	40.0000	0	0	0	0	0	0	0	0

Lead Requirements

Requirement	Comments	Response
Amenities		
Competition		

This is where you enter in your room block numbers. Fill in each area of the screen by entering in numbers or selecting items from the dropdown lists provided. You are able to select an option if needed, identify if you are holding the rooms (check mark the Holding box), identify flat or itemized pricing, specify your rack rates, proposed rates, and if these rates are guaranteed or you are using variable pricing.

The required fields on this page are the Proposed Rate box, the Rooms per Day and the Blocked column. You will need to enter a room number in at least one day in the

room flow in either the Blocked column or the Single, Double, Triple, Quad or Suite column before Accepting the lead.

The Guaranteed area is to show if the rates you are giving are Guaranteed (No, Fixed, Variable). Then enter a percentage if the rates are variable. You can enter the Price Year of the rates you are giving if the event is far in the future. These are not required fields.

<b>Guaranteed</b>	No ▼	0 %	<b>Price Year</b>	
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If Flat Pricing is checked, you can type in ONE rate for Rack Rate and Proposed Rate. If itemized pricing is checked, you can enter in a separate rate in the Single, Double, Triple, Quad and Suite fields.

☒ Flat Pricing ☐ Itemized Pricing

If you are actually holding these rooms for the client, you can check the Holding box on the top right. ☐ Holding

The Option dropdown is for you to select if you are giving this client 1<sup>st</sup> Option, 2<sup>nd</sup> Option or Joint First Options with these rooms.

<b>Option</b>	0 ▼
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If the Total Blocked is checked, you can only enter room numbers in the Blocked column. If the Blocked by Room Type is checked, you can enter room numbers in the Single, Double, Triple, Quad, Suite boxes.

Do NOT enter Contracted or Pickup Numbers at this time.

Request/Available		<input type="radio"/> Total Blocked <input checked="" type="radio"/> Blocked by Room Type													
	Need	%	Blocked	Single	Double	Triple	Quad	Suite	Contracted	Pickup					
Mon 9/30/2013	100	100.0000	0	0	0	0	0	0	0	0	0	0	0	0	0
Tue 10/1/2013	100	100.0000	0	0	0	0	0	0	0	0	0	0	0	0	0
Wed 10/2/2013	100	100.0000	0	0	0	0	0	0	0	0	0	0	0	0	0
Thu 10/3/2013	100	100.0000	0	0	0	0	0	0	0	0	0	0	0	0	0
Fri 10/4/2013	40	100.0000	0	0	0	0	0	0	0	0	0	0	0	0	0

To fill in the Blocked Column quickly you can type in the peak number of rooms in the Rooms per Day box and click Auto Fill Rooms and the system will automatically enter the number of rooms blocked in each day for you.

Lead Requirements will be listed at the bottom of the screen. Enter in any responses in the boxes provided.

Lead Requirements		
Requirement	Comments	Response
Action Steps	IF YOU ARE LOCATED WITHIN CLOSE PROXIMITY TO THE MINNEAPOLIS CONVENTION CENTER AND HAVE AVAILABILITY, PLEASE COMPLETE THE ATTACHED RBC BY <b>TUESDAY, JANUARY 2, 2007</b> . PLEASE ALSO COMPLETE AND RETURN THE ATTACHED HOTEL PARTNERSHIP AGREEMENT BY <b>TUESDAY, JANUARY 2, 2007, AS WELL</b> . APOLOGIES FOR THE SHORT NOTICE ON THIS, BUT PROPOSAL IS DUE TO THE CLIENT ON FRIDAY, JANUARY 5, 2007. PLEASE DO NOT CONTACT THE CLIENT DIRECTLY AT THIS TIME.	
Event Profile	The <b>Orthopaedic Trauma Association</b> is an educational and scientific organization dedicated to the discovery and dissemination of knowledge and information regarding the care and treatment of injuries to the musculoskeletal system. The <b>Annual Meeting of the OTA</b> is dedicated to presenting original research as well as new and current methods for the treatment of musculoskeletal injury. Specific research sessions include: original paper presentations dedicated to specific anatomic injury and original basic science papers. Educational objectives will be fulfilled through the presentation of scientific presentations and symposia with subsequent discussions in an open forum. Ample opportunity will be available to express common concern, share relevant experiences and provide alternate treatment approaches. General themes of orthopaedic trauma care will be presented by topic-focused symposia, motor skills workshops, case presentations and scientific poster presentations.	
Meeting Requirements	Exhibits and majority of meetings anticipated to be at the Minneapolis Convention Center.	

Once all information is entered on this screen, you can click the Save button at the top of the screen. This saves all your information but DOES NOT submit it to the DMO. This allows you to come back to it at a later time and make changes, then click the Accept button. Once the Accept button is clicked, the information you entered is sent to the DMO.

Pending Save
Accept
Decline

If there is more than one Room Block for different dates, each one must be completed separately.

Lead						
Lead Document <span>Click the dropdown list to see all available reports you can print regarding this lead.</span>						
Lead Sent	1/7/2014	Event Status	Tentative	Status Date	1/7/2014	
Bid Submissions						
Accommodations - Open		Selection Status - Pending			<span>Decline All Dates</span> <span>Submit Bid Below</span>	
Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Action
Option 1		8/1/2014	8/3/2014	Not Submitted	Open	<span>Respond To Lead</span>
Option 2		8/15/2014	8/17/2014	Not Submitted	Open	<span>Respond To Lead</span>

If there are several date options like the example shown above, if you enter all rates and information on the first set of dates, you can then click the Edit button on the second set of dates and select Option 1 from the dropdown menu "Copy From" shown below.

Option 2 - 8/15/2014 - 8/17/2014 - Open						
Copy From: <span>Unspecified</span>			<span>Pending Save</span> <span>Accept</span> <span>Decline</span>			
Guaranteed	No	0 %	Price Year		<input checked="" type="radio"/> Flat Pricing <input type="radio"/> Itemized Pricing <input type="checkbox"/> Holding	
	Flat	Single	Double	Triple	Quad	Suite
Rack Rates	0.00	0.00	0.00	0.00	0.00	0.00
Proposed rates	0.00	0.00	0.00	0.00	0.00	0.00
Option	0		Total Revenue	0.00	Rooms per Day	0
<span>Auto Fill Rooms</span>						
Request/Available						
<input type="radio"/> Total Blocked <input checked="" type="radio"/> Blocked by Room Type						
	Need	%	Blocked	Single	Double	Triple
Fri 8/15/2014	500	100.0000	0	0	0	0
Sat 8/16/2014	500	100.0000	0	0	0	0
Sun 8/17/2014	200	40.0000	0	0	0	0



This will copy all information you typed or selected in the first set of dates into the second, third, etc. set of dates. This is a fast way to make the same responses to each set of dates without having to retype everything. You can change any numbers needed once you have used the Copy From option, as long as you make the changes before clicking on the Save or Accept button.

The system will show you under the Bid Submissions area which date options you have accepted, declined or saved. A note will also be created under the Notes area each time you accept or decline a set of dates on a lead.

Lead    Lead Document    Click the dropdown list to see all available reports you can print regarding this lead.						
Lead Sent	1/7/2014	Event Status	Tentative	Status Date	1/7/2014	

Bid Submissions						
Accommodations - Open		Selection Status - Pending			Decline All Dates    Submit Bid Below	
Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Action
Option 1		8/1/2014	8/3/2014	Not Submitted	Open	<a href="#">Respond To Lead</a>
Option 2		8/15/2014	8/17/2014	Not Submitted	Open	<a href="#">Respond To Lead</a>

**After a lead has been Accepted or Declined by you - or Closed by the DMO, you can no longer respond to the lead.**

**Be sure to respond to ALL sets of dates!**

**YOU WILL NEED TO CONTACT THE DMO TO MAKE CHANGES TO LEADS IF THE ACCEPT OR DECLINE BUTTONS ARE NO LONGER AVAILABLE.**

## STEP 8 – DECLINE A LEAD

You can decline a lead from two different screens. You can click on the Decline Lead button in the Bid Submissions area, or you can click into the Bid Submission area by clicking on the Edit button. The Accept, Decline and Save buttons will be at the top of the screen.

Both choices will bring you to the box below where you can choose the best reason and add any notes that you need. Then click the Submit button and the DMO is then notified that you declined this lead and can read your reason for declining.

**Decline All Dates**

Decline Lead

Reason	- Select Reason -
Additional Comments	- Select Reason - Already Booked Can not meet clients specifications Hotel too small, not enough rooms Missed 'Respond By' Date Not enough space Not interested (Please Explain) Other (Please Explain) Rates (Please Explain)

Submit

You will need to contact the DMO to make changes to leads if the Accept or Decline buttons are no longer available. They can then change your response for you.

Remember: Nothing goes to the client from within this system. You have to correspond to them separately via phone, email, etc. The responses to the CVB go to the CVB within the iDSS system.

## STEP 9 – SEARCHING FOR A LEAD NOT ON HOME PAGE

To search all of your received leads, go to Search > My Leads where you can use the search filters above the lead area. Select your search criteria by clicking on the dropdown arrows or calendar icons to set your choices and then click the Search button. Your search results will appear at the bottom of the screen.

Search				Search	
Assigned User	piadmin@training			Lead Status	Open
Lead Date	From: <input type="text"/>	To: <input type="text"/>		Lead Type	- No Filter
Respond By	From: <input type="text"/>	To: <input type="text"/>		Event Type	- No Filter
Start Date	From: <input type="text"/>	To: <input type="text"/>		Event Status	- No Filter
End Date	From: <input type="text"/>	To: <input type="text"/>		Account Name	<input type="text"/>
Selection Status	Unspecified				

**To search on All leads received, make sure all dropdown fields are set to –No Filter– and all other fields are blank.**

**Assigned User:** If you are the XtraNet-Lead Admin at your location, you can search for each user's leads at your location by selecting their name in the Assigned User dropdown or you can leave it set to – No Filter – and search for all leads sent to your location. If you are a Partner User, your login name will be displayed.

**Lead Date:** You can search by Lead Date (the date the lead was received) by selecting a From and To date by either typing the date in manually or using the calendar icon.

**Respond By:** You can search by Respond By date (the date the lead needs to be responded to) by either typing the date in manually or using the calendar icon.

**Start Date:** You can search by the start date of the event by either typing the date in manually or using the calendar icon.

**End Date:** You can search by the end date of the event by either typing the date in manually or using the calendar icon.

**Lead Status:** You can search for leads that are either No Response, Open, Accepted, Declined.

**Lead Type:** You have two options, Accommodations or Facility/Venue Space.

**Event Type:** You can search for received leads by their event type by selecting Meeting, Reunion, Sporting, Tour, Wedding, Etc.

**Event Status:** Inquiry, Lead, Tentative, Definite, Lost Opportunity, Canceled Booking, History, Etc. To see an Event Status, you must first select an Event Type.

**Account Name:** You can type in the name of any Group (client name) and search for all events for that group. Make sure all other fields are empty or set to – No Filter –.

**Selection Status:** Search by leads you have been selected as Headquarter (HQ), Overflow or Not Selected.

## STEP 10 – ENTER CONTRACTED & PICKUP NUMBERS

When an event has gone Definite, and is in the past, the DMO can request that you fill in any Contracted or Picked Up rooms for any particular event.

Contracted is for the hotel to enter as the client sometimes asks for one room amount, then the final contract has a different amount, so this is where the difference in rooms is documented. You will be given the role of “XtraNet-Lead Pickup” in addition to the role of either “XtraNet-Lead Admin” or “XtraNet-Lead User”.

You will receive a note on your Home Page, and a Enter Pickup button in the Pickup section of your Home Page. Click on the Enter Pickup button.

Pickup Information Needed							
Account Name	Event Name	Last Room Date	Peak Rooms	Lead Status	Lead Types	Info	Edit
Bell Meeting Association	2013 Annual Conference	11/3/2013	100	Accepted	acc		<b>Enter Pickup</b>

This brings you into the Lead. Now click the Respond To Lead button again to enter the Contracted and Pickup numbers.

Bid Submissions							
Accommodations - Open				Selection Status - Pending		<b>Decline All Dates</b>	<b>Submit Bid Below</b>
Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Action	
Option 1		8/1/2014	8/3/2014	Not Submitted	Open	<b>Respond To Lead</b>	

The numbers originally submitted will be grayed out. The Contracted and Pickup columns will be live and highlighted in Red. Enter the Contracted and/or Pickup numbers for this event, then click the Save Contracted button to save the contracted numbers. Click the Save Pickup button when finished entering in the pickup numbers. The system will send a Note to the DMO/CVB informing them that you have completed this task. This lead will then fall off the Pickup section of your Home Page.

Please click Respond to enter A.D.R. and Contracte - 8/1/2013 - 8/1/2013 - Accepted				Copy From: Unspecified		<b>Pending Save</b>		<b>Accept</b>		<b>Decline</b>	
Guaranteed	No	0	%	Price Year		Flat Pricing <input checked="" type="radio"/> Itemized Pricing <input type="radio"/>		Holding <input type="checkbox"/>			
	Flat	Single	Double	Triple	Quad	Suite					
Rack Rates	0.00	0.00	0.00	0.00	0.00	0.00					
Proposed rates	0.00	0.00	0.00	0.00	0.00	0.00					
Option	0	Total Revenue	0.00	Rooms per Day	0	<b>Auto Fill Rooms</b>					
Request/Available <input checked="" type="radio"/> Total Blocked <input type="radio"/> Blocked by Room Type											
	Need	%	Blocked	Single	Double	Triple	Quad	Suite	Contracted	Pickup	
Thu 8/1/2013	0	0.0000	0	0	0	0	0	0	0	75	

\*\*Only those that have been given the role of XtraNet-Lead Pickup by the organization that sends you leads will receive the Pickup Notices on your home page and be able to complete the pickup process..

## LEAD DOCUMENT INFORMATION

Below is an example of a lead document along with detailed descriptions of each area.

**Account Name and Name of Event:** Shows the name of the account and the event name.

**Event Contact:** This shows you the contact name and information for this particular event. If the DMO has made this lead confidential, you will not see this information.

**DMO Contact:** List the name and contact information of the person at the DMO that has sent you this lead.

**Respond To:** This indicates who to respond to regarding this lead. There are 3 choices: DMO Name, Client Name, or Both. Both means that you should respond to the client but send a carbon copy to your DMO.

**Event Dates:** This will list all of the dates for the lead, and whether the DMO indicated date options.

**Lead Sent:** Respond By and Decision Date - Important dates for the lead.

**Attendance:** Total number of estimated attendees for this event.


**Economic Impact:** Dollar amount for estimated Economic Impact on your city for this event.

**Peak Room Nights:** Total number of hotel rooms expected for event at it's peak time.

**Total Rooms Needed:** Total number of hotel rooms needed for this event.

**Scope:** The scope is entered in by the DMO for this event for tracking purposes.

**Primary Source:** Lists the source of the event.

		<b>Lead</b>	
<b>Account Name:</b> Buckley Groups		<b>CVB Demo Contact:</b>	
<b>Name of Event:</b> 2009 Conference		Shelly Hervey	
<b>Event Contact:</b> Rozina Ahmed		Client Support Agent	
CVB Demo		Phone: 612-229-4626	
234 Kater Lane 212		Fax: 509-967-0214	
Minneapolis, Minnesota 55443 US		Email: shellyh@idss.com	
Email: support@idss.com			
<b>Respond To:</b> CVB Demo			
<b>Date Information:</b>		<b>Event Dates</b>	<b>Room Night Dates</b>
<u>Optional Dates</u>			
Option 1		1/5/2007 - 1/8/2007	1/5/2007 - 1/8/2007
Option 2		1/12/2007 - 1/15/2007	1/12/2007 - 1/15/2007
<b>Lead Sent Date:</b>	11/8/2006	<b>Attendance:</b>	450
<b>Respond By Date:</b>	11/15/2006	<b>Peak Rooms:</b>	450
<b>Decision Date:</b>	11/17/2006	<b>Total Room Nights:</b>	1,700
<b>Scope:</b>		<b>Economic Impact:</b>	\$28,000.00
<b>Primary Source:</b>	Meeting Group		

The next part of the lead document is the Accommodations and Facility/Venue Lead Requirements. These are any special questions, comments or requirements the client or DMO has asked for regarding this event. You can respond to each of these requirements.

**Accommodations Lead Requirements:**

**Action Steps**

Step 1 - Read lead information

Step 2 - Fill out Room Block Information

Step 3 - Respond

**General Note**

Client wants red and blue tableclothes on tables.

**Facility/Venue Space Lead Requirements:**

**Meeting Requirements**

Client wants red and blue tableclothes on all tables.

Client also wants white carnation flowers on each table.

20 total for 10 foot tables, 4 chairs at each table.

The Room flow and Venue Patterns are shown next on the lead document. You will see the arrival/departure pattern for the lead. If there are more than 1 set of dates, the first one in date order will be detailed in the document. The Venue Pattern gives you any specific venue information for each day. Then any History for similar past events, if any, will show at the bottom.

**Room Flow Pattern**

Date	Day	Total Rooms Requested	Percent of Peak	Single	Double	Triple	Quad	Suite	Total Rooms Contracted
11/3/2008	Monday	44	100%	0	0	0	0	0	0
11/4/2008	Tuesday	44	100%	0	0	0	0	0	0
11/5/2008	Wednesday	44	100%	0	0	0	0	0	0
11/6/2008	Thursday	44	100%	0	0	0	0	0	0
<b>Totals:</b>		176		0	0	0	0	0	0

This is the room flow pattern for Event Sessions: Fixed Dates.

**Venue Pattern**

Date	Day	Comments
11/3/2008	Monday	Need tables and chairs for 50 people plus stage and microphone
11/4/2008	Tuesday	Need tables and chairs for 50 people plus stage and microphone
11/5/2008	Wednesday	Need tables and chairs for 50 people plus stage and microphone
11/6/2008	Thursday	Need tables and chairs for 50 people plus stage and microphone

**History:**

Year	Date	City	HQ Hotel	Peak	Total Rooms
2006	10/1/2006-10/3/2006			100	300

Partners: This area shows you which partners received this lead and if they received either the Accommodations lead and/or the Facility/Venue space lead.

**Partners:**

Name	acc	fra
Hilton Downtown Hotel	X	X
Hilton Hotel	X	X
Quality Inn & Suites St. Charles	X	X
The Marriott Hotel	X	X

## CLOSED LEADS & SELECTIONS

The DMO has the ability to close a Lead at any time. They can do this when the Lead has met or passed the Respond By date, or the client has made their decision, and the DMO does not need further responses. When they close a Lead, the Lead status of any Partner that did not respond is set to Not Selected, and locks the responses already sent in. Once the Lead is Closed, you will no longer see the Lead in your queue unless you search for it. The Lead is no longer Open, and the screen defaults to showing only the Open leads.

When the DMO sets Headquarter selections, the following information will be shared with the Partners that are using the Partner XtraNet:

The screenshot shows the Partner XtraNet interface. At the top, there's a 'Lead' section with a dropdown menu set to 'Lead Document'. Below this, a table displays lead information: 'Lead Sent' (9/24/2013), 'Event Status' (Definite), and 'Status Date' (9/24/2013). Below the lead information is a 'Bid Submissions' section. It features a green bar with 'Accommodations - Accepted' and 'Selection Status - Headquarter' (highlighted with a red arrow). To the right of this bar are buttons for 'Decline All Dates' and 'Submit Bid Below'. Below the green bar is a table with columns: 'Event Session', 'Event Session Description', 'First Room', 'Last Room', 'Submitted', 'Event Session Status', and 'Respond'. The first row of the table contains the text 'Please click Respond to enter A.D.R. and Contracte' under 'Event Session', and '8/1/2013' under 'First Room' and 'Last Room'. The 'Submitted' column shows 'Not Submitted' and 'Event Session Status' shows 'Accepted'. A red arrow points from the 'Selection Status - Headquarter' label to the 'Submitted' column.

Event Session	Event Session Description	First Room	Last Room	Submitted	Event Session Status	Respond
Please click Respond to enter A.D.R. and Contracte		8/1/2013	8/1/2013	Not Submitted	Accepted	<a href="#">Respond</a>

Selection Status can be one of three: HQ, Overflow or Not Selected (if Pending it will change to Not Selected).

7/30/2010 9:52 AM	Partner Note	1999 Annual Meeting	Nat'l Assn of Law Placement	Partner Selections have been confirmed for: 1999 Annual Meeting (Accommodations - 7/30/2010 9:51:24 AM). Your selection status is: Not Selected	<input type="checkbox"/>	<a href="#">Detail</a>
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If you are selected as the Headquarter, Overflow, or not selected for this event, you will be notified via a note within the lead AND receive an email.

When a lead is closed, you will receive a note on your Home page and the lead page will show your selection status. The DMO/CVB closes leads when responses are no longer needed.

10/13/2009 12:55 PM	Lead Closed	2008 The Management Success! "How to Increase Your Profits" Training Seminar	Management Success	Accommodations - Lead has been Closed	<input checked="" type="checkbox"/>	<a href="#">Detail</a>
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The Lead will now be locked on the Partner XtraNet side so you can not change your response, and you can't respond at all if you have not responded yet.

## VIEWING & PRINTING DOCUMENTS

To view a document and/or file attached to the lead, click on the document link (see below) and it will open in Word if it is a .doc, in Adobe Acrobat if it is a .PDF. The document was uploaded to the iDSS server and can be accessed anytime. Any type of document can be attached to a lead as long as it is 4 MB or less in size. Documents can be attached by you or the DMO. You will both be able to see these documents and they will always be saved with this lead.

File - Displaying 1 thru 1 of 1 records.

File	Description	Uploaded By	Uploaded Date	
<a href="#">LeadDocument.pdf</a>	EventLeadID=209511	leaddocpdfcreator	10/10/2013	

You can also view and print lead documents with the DMO logo on them. Click on the dropdown arrow to see your document options. Choose the document and then click on the printer icon to the right of the document title. This will open the document up and you can print it from there.

Lead	Lead Document	Event Status	Definite	Status Date	10/10/2013
Lead Sent	Lead Document				
Bid Submissions	Event - Group Tour Lead				
Accommodations	Event - Lost Opportunity Reasons				
Event Session	Event - Venue Space Lead				
Client Dates	Event Lead Update - Cancelled Booking				
	Event Lead Update - Definite				
	Event Lead Update - Lost				
	Event Lead Update - Update				
	PI Response Form				
	PI Response Summary with Notes				

Selection Status - Pending				Decline All Dates	Submit Bid Below
First Room	Last Room	Submitted	Event Session Status		
9/1/2015	9/1/2015	Submitted	Accepted	<a href="#">Respond</a>	

Notes			<a href="#">Add</a>
10/22/2013	piadmin@training	The following date set has been accepted and submitted for the RBC: 9/1/2015 - 9/1/2015.	
10/10/2013		Accommodations Lead Type was assigned to PIAdmin@training	

You may also see the Reports section at the very top of your Home page with available reports.

Reports	Partner - Leads Received Detail List	
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## **TROUBLESHOOTING**

### **Not Receiving Email Notifications:**

There have been occasions where a Partner indicates that they are not receiving the lead email notifications. Here are some of the steps to take to resolve this.

You must be set up as with a login name and password by your DMO in order to receive the lead notification emails.

Next, it is important that your email address given to the DMO is a valid email address. Sometimes email sent from the iDSS System can be blocked by a spam blocker such as McAfee Anti-Spam, Norton Spam Filter or Outlooks built in junk mail rules.

To prevent a third party spam filter from blocking emails from the iDSS system you will have to add the address: \*.idssasp.com to the acceptable addresses in your third party spam filter. To stop Outlook from considering iDSS System email notifications as junk mail you will need to open Outlook, select Tools and then Options. Select Junk E-mail.


When you click on Safe Senders, press Add and enter \*.idssasp.com or lead.administrator@idssasp.com. Press OK and then press the Blocked Senders button. Then make sure that iDSS.com is not in the Blocked Senders list. If it is then you will highlight it by clicking on it and pressing remove.

### **Get Error Messages:**

When there is an issue with the system or a lead that has been sent to you, or you have entered something wrong, you will receive a 'Whoops' error message. If this happens, please contact your DMO and give them your login name and password, the event name and dates of the lead, and exactly what steps you were taking when you received the error message. If your DMO is not able to help you, please see the instructions below for contacting iDSS Support directly.

## **HELP MENU**

If you click on the Help tab and choose Help, you will find the most recent training documents for you to access in PDF format.

 Partner\_Documents

**Go to the folder called Partner Documents for the latest manuals.**

## **QUESTIONS – HOW TO REACH SUPPORT**

If you have questions, contact iDSS Support by email: [support@idss.com](mailto:support@idss.com).