



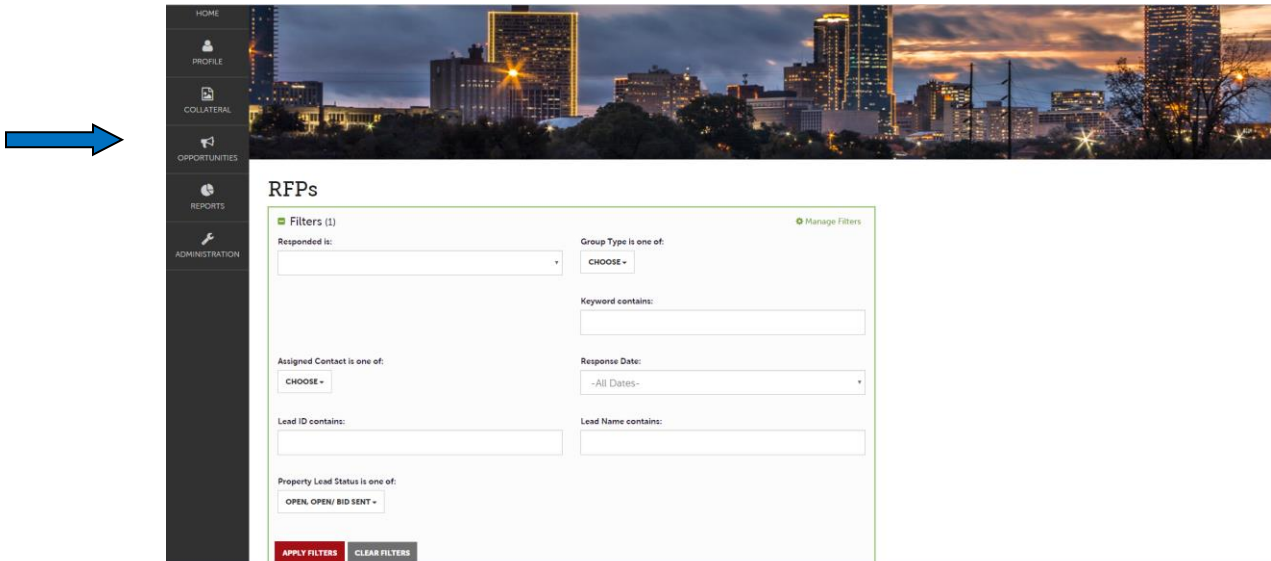
Visit Fort Worth

111 W. 4th Street | Suite 200 | Fort Worth, Texas 76102-3951

Partner Portal Instructions
Reviewing
and
Entering Pickup
for Leads
(Meeting Sales & Sports – View and Pick-up)

Opportunities / Leads:

Upon logging in, you will need to click the **Opportunities icon** which will display RFPs (Meeting/Sports and Tour Leads) sent by Visit Fort Worth.



The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the “Apply Filters” button. By Default, you will see all of your Open Leads and Opens Leads you have already bid on.

- **LEAD STATUS DEFINITIONS**
 - **Closed / Won:** These are definite Leads in which your property was selected.

Reviewing Leads

Below the filters section, you will see a data grid with all your Leads based on the selected filters. One of the more important column headings is the Group Type. This signifies if you are looking at a Meeting Sales, Sports or Tour Lead.

You are able to sort your list of leads by clicking on any of the column headers (i.e. Opportunity Name, Organization, etc.). Click on the Lead Name or ID to open and respond to the lead. All responses must be entered by the Hotel Responses Due Date.

Actions	Group Type	Lead ID	Lead Name	Organization	Response Date	Arrival (Preferred)	Departure (Preferred)	Property Lead Status	Responded	Create Date	Assigned Contact	
	Meeting	17330	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/01/2042	12/01/2043	12/03/2043	Open	No	07/20/2016	Andrea Timbes, CTA, CNSA	

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To view a Lead, click on the Eyeball icon or the Lead Name.

Reporting Meeting Sales/SportsLead Pick-up

A part of your Lead process may be to add room Pickup information. This data can only be added to RFPs that your Property has won and if the DMO has identified you as a Pickup Manager.

To see what past business is available for your Property to report pick up on, you will need to access the RFP Page. Adjust the Filter Grid to include a status of Closed / Won and then apply filters. To limit the results to a specific Lead, you can provide the Lead ID.

Actions	Group Type	Lead ID	Lead Name	Organization	Response Date	Arrival (Preferred)	Departure (Preferred)	Property Lead Status	Responded	Create Date
	Meeting	17330	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/01/2042	12/01/2043	12/03/2043	Open	No	07/20/2016
	Meeting	17285	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/31/2040	12/01/2043	12/03/2043	Closed/ Won	Yes	07/12/2016
	Meeting	17285	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/31/2040	12/01/2043	12/03/2043	Closed/ Won	Yes	07/12/2016

To access the Lead, click on the Eyeball icon or the Lead Name.

Sections:

- Responses
- Lead Information
- Meeting Dates
- Room Summary
- History/Futures
- Decision Details
- Meeting Space
- Exhibit Space
- Commission / Rebate
- Housing
- Incentive Programs
- Misc
- Room Data
- Revision Notes

When viewing the Lead, you can skip to difference sections by clicking the left navigation. In the above graphic, this is the Lead Information section; Pickup information is contained within the Room Data section.



Steps to enter Room Pick-up

- a) Click on the Pickup button to access the room block information.

Room Data		Update Booked Rooms by Days Out				Total Pickup
Add/Edit	Property	120 Days	90 Days	60 Days	30 Days	
Daysout Pickup	FWCVB					
Daysout Pickup	Simpleview, Inc.					

- b) Lead Information and original requested room block are there for review

Lead Information

Lead ID 17285
 Opportunity Name test for Partner Portal Launch 4.0
 Organization Fort Worth Convention and Visitors Bureau
 Contact Andrea Timbes
 111 W. 4th Street
 Suite 200
 Fort Worth TX 76102
 UNITED STATES
 (817) 698-7838
 AndreaTimbes@FortWorth.com
 3rd Party Meeting Planner HelmsBriscoe
 Meeting Planner Contact Alice Yount
 4500 Marlborough Court
 Minnetonka MN 55345
 UNITED STATES
 (952) 238-0899
 ayount@helmsbriscoe.com
 Arrival 12/01/2043
 Departure 12/02/2043

Room Summary

	Tue 12/01	Wed 12/02	Thu 12/03	Fri 12/04	Sat 12/05	Sun 12/06	Mon 12/07
Rooms	15	15	-	-	-	-	-
% of Peak	100%	100%	-	-	-	-	-
Requested Rooms	30						
Peak Requested	15						
Additional room requests/needs	thiurthrituhruh						

- c) The Pickup Rooms section is where you can enter the number of rooms and average daily room rate, that your property provided for this Lead

peak requested: 20

Additional room requests/needs

[SAVE](#)

[CANCEL](#)

Sections:

- [Lead Information](#)
- [Room Summary](#)
- [Pickup Rooms](#)

Pickup Rooms

Pickup Rooms:

Pickup Avg. Daily Room Rate:

\$

Sun	Mon	Tue	Wed	Thu	Fri	Sat
12/20/2015	12/21/2015	12/22/2015	12/23/2015	12/24/2015	12/25/2015	12/26/2015
0	0	0	0			

- d) If the Pickup dates available on the extranet do not allow the partner to enter rooms for all of the shoulder dates they picked up, they can add the shoulder dates themselves as outlined below.

1. On the Pickup form, click **Add Shoulder Days**

Room Summary

	Tue 08/09	Wed 08/10	Thu 08/11	Fri 08/12	Sat 08/13	Sun 08/14	Mon 08/15
Rooms	5	25	25	150	200	200	25
% of Peak	2%	12%	12%	75%	100%	100%	12%

	Tue 08/16	Wed 08/17	Thu 08/18	Fri 08/19	Sat 08/20	Sun 08/21	Mon 08/22
Rooms	5	-	-	-	-	-	-
% of Peak	2%	-	-	-	-	-	-

Requested Rooms: 655
Peak Requested: 200
Additional room requests/needs:

Pickup Rooms

Pickup Rooms: Pickup Avg. Daily Room Rate: \$

ADD SHOULDER DAYS

Tue	Wed	Thu	Fri	Sat	Sun	Mon
09/29/2015	09/30/2015	10/01/2015	10/02/2015	10/03/2015	10/04/2015	10/05/2015
<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="200"/>	<input type="text" value="200"/>	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="0"/>

Tue	Wed	Thu	Fri	Sat	Sun	Mon
10/06/2015	10/07/2015	10/08/2015	10/09/2015	10/10/2015	10/11/2015	10/12/2015
<input type="text" value="1"/>	<input type="text" value="22"/>	<input type="text" value="22"/>	<input type="text" value="22"/>	<input type="text" value="47"/>	<input type="text" value="95"/>	<input type="text" value=""/>

2. Enter the number of days to add before the block or after the block, and click **Save**.

Add Shoulder Days

of Shoulder Days Before:

of Shoulder Days After:

UPDATE **CANCEL**

Once they click **Update**, the Pickup block will adjust by adding the shoulder dates, as entered. This will update the block on the lead as well so that when other partners attempt to enter Pickup, they will see the same set of block dates, including the newly added shoulder dates.

Add Shoulder Days

of Shoulder Days Before:

! Must be less than 5

of Shoulder Days After:

! Must be less than 5

UPDATE **CANCEL**

ADD SHOULDER DAYS

Thu	Fri	Sat	Sun	Mon	Tue	Wed
10/01/2015	10/02/2015	10/03/2015	10/04/2015	10/05/2015	10/06/2015	10/07/2015
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>

Be sure to click the **Save** after you have supplied the appropriate room information.