



Visit Fort Worth

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

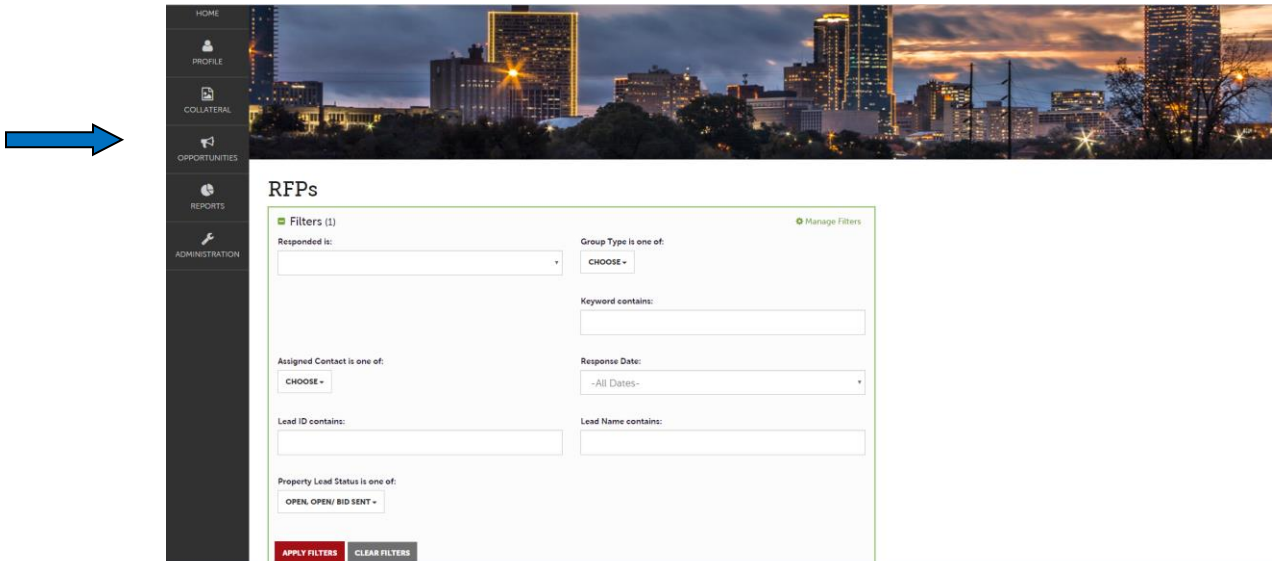
Partner Portal Instructions

Reviewing and Responding to Leads

(Meeting Sales & Sports – View, Respond 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 / No Bid Sent:** These Leads can be Pending, Definite, Lost or Cancelled. The status signifies this is business your property did not bid on and the response due date has passed.
- **Open:** These are Leads in a pending status that your property has not bid on and the response due date has not passed.
- **Open / Bid Sent:** These are Leads in a pending status that your property has already placed a bid on and the response due date has not passed. In this status, you can update your response at any time.
- **Turned Down:** These Leads can be pending, Definite, Lost or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.
- **Closed / Decision Pending:** Your property has placed a bid, but the response due date has passed thus you cannot edit your response.
- **Closed / Lost to Another City:** These are Leads you were pursuing, but the business has been lost.
- **Closed Cancelled:** These are Leads where you won the business, but the group has cancelled.
- **Closed / Won:** These are definite Leads in which your property was selected.
- **Closed / Won - Properties TBD:** These are definite Leads but the group has not decided on a hotel yet.
- **Closed Lost:** These are definite Leads in which your property was not selected for the business.

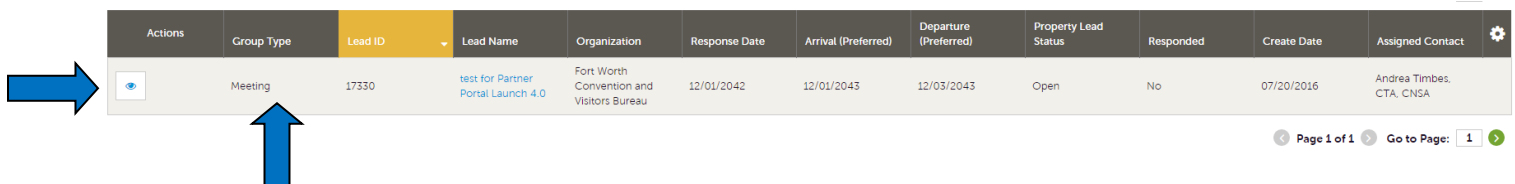
Reviewing Leads (Meeting Sales, Sports and/or Tourism Leads)

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.

NOTE:

ONLY the property lead catcher(s) are able to see all leads.
Sales Managers are only able to see leads ASSIGNED to them.

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.


1. Reviewing the Meeting Sales /Sports Lead

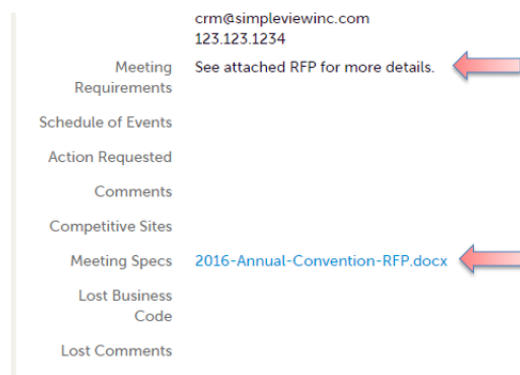
When viewing the Lead, you can skip to difference sections by clicking the left navigation. For notes and attachments on the Lead, these can generally be found in the Lead Information section. In the graphic below, this is the Lead section; attachments will be found in the Meeting Specs field.

Lead Details



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



crm@simpleviewinc.com
123.123.1234

Meeting Requirements See attached RFP for more details.

Schedule of Events

Action Requested

Comments

Competitive Sites

Meeting Specs 2016-Annual-Convention-RFP.docx

Lost Business Code

Lost Comments

2. Assigning the MeetingSales/Sports Lead

The property lead catcher will need to assign the lead to the appropriate Sales Manager. This can be done in the “Response Section”.

Responses

FWCVB

Status Open

Currently Assigned None (Assign)

- Select “Assign”
- On the new screen to your right, select the Sales Manager who should receive this lead

Assign Contact

Search for Contact:

Search by Name

FWCVB

- Paola Bowman, CTA
- John Cychol, FCDME, CTA
- Nannette Eiland
- Stephanie Garcia
- Jake Sillavan
- Robyn Temple
- Andrea Timbes, CTA, CNSA

Simpleview, Inc.

- Robyn Temple

SAVE CLOSE

- Click “Save” and the assigned Sales Manager will receive an email notification indicating that a new lead has been assigned

donotreply@simpleviewinc.com Andrea Timbes

Fort Worth - Extranet: Lead Assigned

Andrea Timbes, CTA, CNSA,

A new lead has been assigned to you by Andrea Timbes, CTA, CNSA for review and response: (17330) test for Partner Portal Launch 4.0

Response and proposal must be submitted by **12-01-2042**.

If you need assistance or have questions about this lead, please contact Andrea Timbes, CTA, CNSA at andreatimbes@fortworth.com.

Thank you

- Now the assigned Sales Manager will be able to review the lead information in detail

PRINT

RETURN

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

Lead Information

Lead ID 17330

Meeting Name test for Partner Portal Launch 4.0

Profile TEST

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

Meeting Planner Contact Alice Yount
4500 Marlborough Court
Minnetonka MN 55345
UNITED STATES
(952) 238-0899
ayount@helmsbriscoe.com

3rd Party Meeting Planner HelmsBriscoe

Type Special Event

Source Code Website

EEl Type Economic Impact

Market Segment ASSN - Meetings/Conv/Tourism Industry Events

Decision-Making Process Self

Meeting Pattern

Room Attendees 15

3. Add a Response for a Meeting Sales/Sports Lead

After you have reviewed the Lead, scroll **up** to the Responses section. Here you will see options to either add or edit your existing response.

Note: these options are not available once the Response Due Date has passed.

Click the “Plus Icon” to enter/edit your response.

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	12/01/2043 - 12/03/2043	12/01/2043 - 12/02/2043		

Data entered in the response form is send directly to Visit Fort Worth for review. The response form is used to send comments, room rates, room block information, and any file attachments that you wish to include.

New Response

Response Information

Pursuing This Lead: *Required NO YES

Account: *Required FWCVB

Comments: *Required

Bureau-Only Comments:

Rate Range: *Required

From: To: Requested Rooms: 0

Peak Night Rooms: 0

1. Items in **red** are required fields.
2. When adding/editing your response, you will need to tell the Bureau if you are pursuing (**bidding**) the Lead by selecting “Yes or No” to the “Pursuing this Lead Option”
3. The Comments section can be used to respond to any specifics from the Lead.
4. The Room Information section of the response page is where you can enter the number of rooms, by room type that your property can commit to for this lead.

	Mon 02/01/2016	Tue 02/02/2016	Wed 02/03/2016	Thu 02/04/2016	Fri 02/05/2016	Sat 02/06/2016	Sun 02/07/2016
Doubles	0	0	0	0	0		
Multiple	0	0	0	0	0		
Kings	0	0	0	0	0		
Suites	0	0	0	0	0		
Singles	0	0	0	0	0		
Queen Room	0	0	0	0	0		
Total	0	0	0	0	0		
Requested	10	10	10	10	10		

5. The Rate Type section of the response page is where you can enter the rates for each room type that your property can commit for this lead.

Rate Types

Single: Required	Double: Required
Triple: Required	Quad: Required
Staff:	Suites:
Exhibitors:	Government:

6. The General section of the response page is where you can enter any commission, rebate, housing fee and/or lead discussion points.

General

Commission: Required % Rebate: Required \$

\$12 Housing fee, if applicable: YES NO

Lead Review Discussion Points:

If you would like a lead discussed during lead review, this field must contain the issues to be discussed during that review.

7. File Attachments – here you will be able to attach a proposal to your response by clicking on the “Attach File” button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section The CVB will decide whether or not to pass these files to the meeting planner.

SAVE

CANCEL

Sections:

- Response Information
- Room Information
- Rate Types
- File Attachments
- General

File Attachments

ATTACH FILE or drag files to the page

No files have been attached

Once you have finished entering all your response information don't forget to click the save button!

4. Reporting Meeting Sales/Sports Lead 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.

The screenshot shows a filter grid with the following fields:

- Filters (1) Manage Filters
- Responded is: [Dropdown]
- Group Type is one of: CHOOSE [Dropdown]
- Keyword contains: [Text Input]
- Assigned Contact is one of: CHOOSE [Dropdown]
- Response Date: -All Dates- [Dropdown]
- Lead ID contains: [Text Input]
- Lead Name contains: [Text Input]
- Property Lead Status is one of: 3 SELECTED [Dropdown]
- Property Lead Status is one of: 3 SELECTED [Dropdown]

The dropdown menu for 'Property Lead Status is one of:' is open, showing the following options:

- Closed/ No Bid Sent
- Open ✓
- Open/ Bid Sent ✓
- Turned Down
- Closed/ Decision Pending
- Closed/ Lost to Another City
- Closed/ Cancelled
- Closed/ Won ✓
- Closed/ Won - Properties TBD
- Closed/ Lost
- Assist

Buttons: APPLY FILTERS (red), CLEAR FILTERS (grey)

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.

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- Decision Details
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- 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) 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

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Peak requested: 20
Additional room requests/needs

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
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Adding Shoulder Dates

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**

SAVE
CANCEL

Sections:
Lead Information
Room Summary
Pickup Rooms

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: 635
Peak Requested: 200
Additional room requests/needs:

Pickup Rooms

Pickup Rooms: 812
Pickup Avg. Daily Room Rate: \$ 50.00

ADD SHOULDER DAYS

Tue 09/29/2015	Wed 09/30/2015	Thu 10/01/2015	Fri 10/02/2015	Sat 10/03/2015	Sun 10/04/2015	Mon 10/05/2015
100	100	200	200	1	2	0

Tue 10/06/2015	Wed 10/07/2015	Thu 10/08/2015	Fri 10/09/2015	Sat 10/10/2015	Sun 10/11/2015	Mon 10/12/2015
1	22	22	22	47	95	

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

Add Shoulder Days [X]

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.

SAVE
CANCEL

Sections:
Lead Information
Room Summary
Pickup Rooms

Requested Rooms: 635

Pickup Rooms: 4
Pickup Avg. Daily Room Rate:

ADD SHOULDER DAYS

Add Shoulder Days [X]

of Shoulder Days Before

Must be less than 5

of Shoulder Days After

Must be less than 5

UPDATE **CANCEL**

Thu 10/01/2015	Fri 10/02/2015	Sat 10/03/2015	Sun 10/04/2015	Mon 10/05/2015	Tue 10/06/2015	Wed 10/07/2015
0	0	1	2	0	1	0

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