



Visit Fort Worth

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

# Partner Portal Instructions

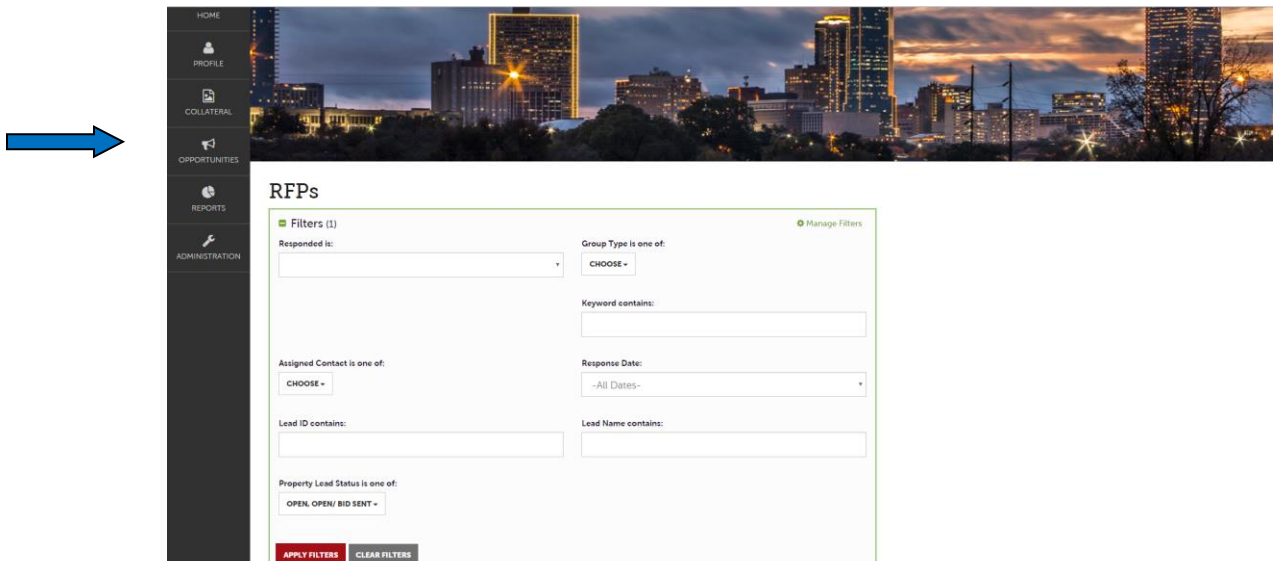
## Reviewing and Responding to Leads

(Meeting Sales/Sports and Tourism Leads  
View, Respond and Pick-up)

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## Opportunities / Leads:

Upon logging in, you will need to click the **Opportunities icon** which will display RFPs (Meeting 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.

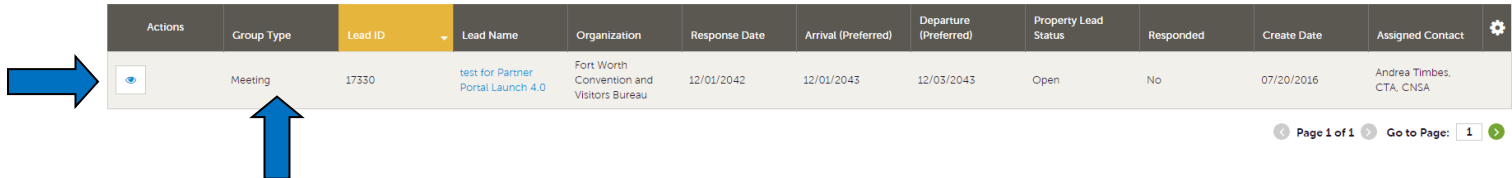
### • LEAD STATUS DEFINITIONS


- **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.

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	

Page 1 of 1 Go to Page: 1

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

### 1. Reviewing the MeetingSales/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

**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

crm@simpleviewinc.com  
123.123.1234

Meeting Requirements See attached RFP for more details.

Schedule of Events

Action Requested

Comments

Competitive Sites

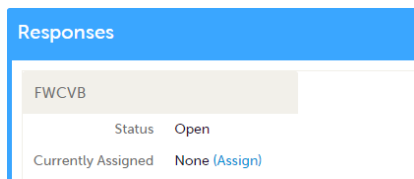
Meeting Specs 2016-Annual-Convention-RFP.docx

Lost Business Code

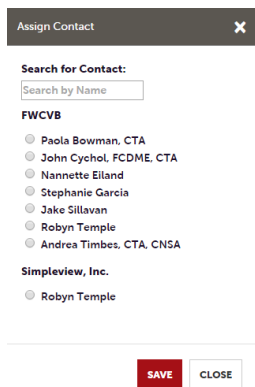
Lost Comments

## 2. Assigning the Meeting Sales/Sports Lead

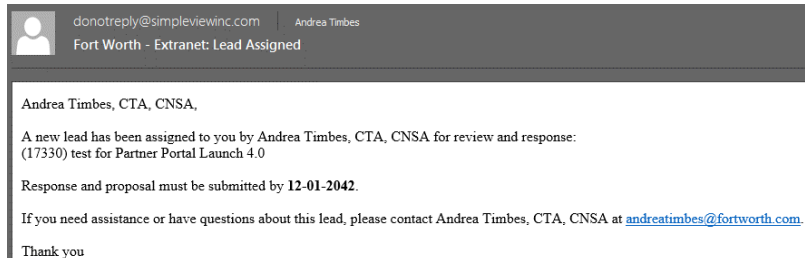
The property lead catcher will need to assign the lead to the appropriate Sales Manager. This can be done in the “Response Section”.



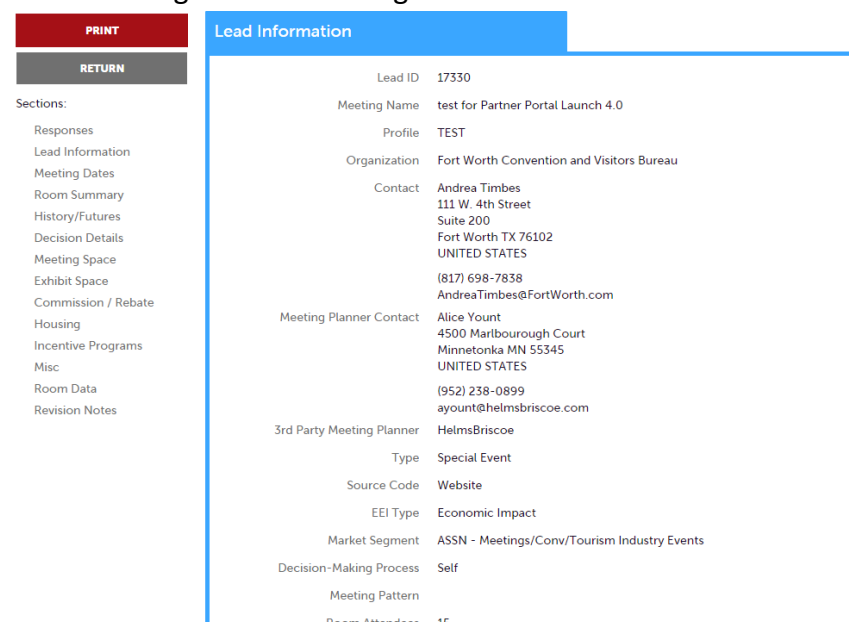
- Select “Assign”
- On the new screen to your right, select the Sales Manager who should receive this lead



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



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



### 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.

Responses

FWCVB

Status: Open

Currently Assigned: Andrea Timbes, CTA, CNSA (Reassign)

[PRINT RESPONSE LOG](#)

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

SAVE

CANCEL

Sections:

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

Response Information

☐ Pursuing This Lead: Required

☐ NO ☐ YES

Account: Required FWCVB

Comments: Required

Please enter comments that should be relayed to the client

Bureau-Only Comments:

These comments will not be seen by the client; they will only be seen by the staff of the Fort Worth Convention & Visitors Bureau.

Rate Range: Required

From: To:

Indicates the range of room rates for this lead. A single rate should be entered in both the low and high rate boxes on the form.

Requested Rooms:

0

The total number of rooms for this lead.

Peak Night Rooms:

0

The maximum number of rooms for any single night in the room block.

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.

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments

Room Information

	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.

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

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 Visit Fort Worth will decide whether or not to pass these files to the meeting planner.



**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.

Filters (1) Manage Filters

Responded is:

Group Type is one of:

Assigned Contact is one of:

Keyword contains:

Response Date:

Lead ID contains:

Lead Name contains:

Property Lead Status is one of:

Property Lead Status is one of:

APPLY FILTERS

CLEAR FILTERS

3 SELECTED

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

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) 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

SAVE

CANCEL

Peak requested 23

Additional room requests/needs

Sections:

Lead Information

Room Summary

Pickup Rooms

### Pickup Rooms

Pickup Rooms:

Pickup Avg. Daily Room Rate:

\$ \$0.00

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"/>

- c) 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%	73%	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:  Pickup Avg. Daily Room Rate: \$

**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
<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 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
<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"/>

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**

**Pickup Rooms**

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

**ADD SHOULDER DAYS**

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
<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.

## 5. Reviewing the Tourism Lead

When viewing the Lead, you can skip to different 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.

### Lead Details

PRINT

RETURN

Sections:

Responses

Lead Information

Room Summary

Notes

Lead Information

Lead ID

9069

Tour Name

TEST

Type

Single Hotel

Account

FWCVB

Contact

Andrea Timbes  
411 West 4th Street  
Fort Worth TX 76102  
UNITED STATES  
andreatimbes@fortworth.com

Arrival/Departure

08/05/2044 - 08/06/2044

Response Due

08/05/2043

Decision Date

People

10

Nights

1

EEL Type

National

Market Segment

Ethnic/Diversity

Client Type

Receptive

Company Profile

Account for misc. referrals but listing contacts for out of town  
1)Texas Association of Nurse Anesthetists, Inc. AUSTIN ( bus referral they are hosting for TCU group)

## 6. Assigning the Tourism 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

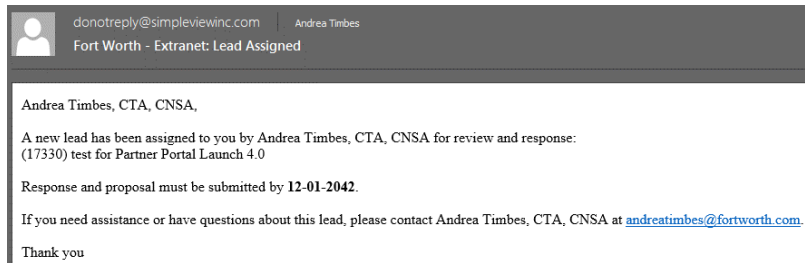
Simpleview, Inc.

Robyn Temple

SAVE

CLOSE

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



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

PRINT

RETURN

Lead Information

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 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

EI Type

Economic Impact

Market Segment

ASSN - Meetings/Conv/Tourism Industry Events

Decision-Making Process

Self

Meeting Pattern

Room Attendees

15

## 7. Add a Response for a Tourism 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.

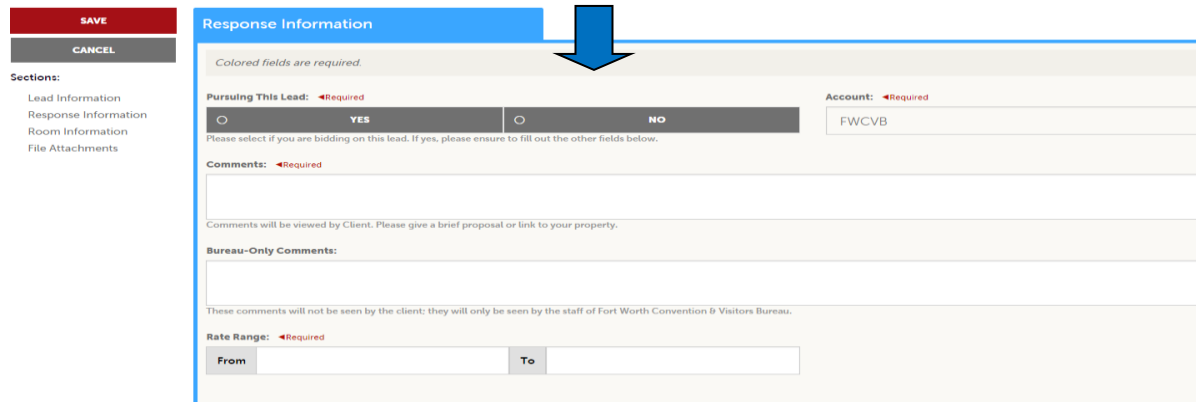
Responses

FWCVB

Status Open

Actions	Meeting Dates	Room Request Dates	Pursuing?	Comments
+	08/05/2044 - 08/06/2044	08/05/2044 - 08/06/2044		

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.



**SAVE**

**CANCEL**

**Sections:**

- Lead Information
- Response Information
- Room Information
- File Attachments

**Response Information**

Colored fields are required.

**Pursuing This Lead:** \*Required

☐ YES ☐ NO

**Account:** \*Required FWCVB

Please select if you are bidding on this lead. If yes, please ensure to fill out the other fields below.

**Comments:** \*Required

Comments will be viewed by Client. Please give a brief proposal or link to your property.

**Bureau-Only Comments:**

These comments will not be seen by the client; they will only be seen by the staff of Fort Worth Convention & Visitors Bureau.

**Rate Range:** \*Required

From To

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.

**Room Information**

Any Type:

Singles:

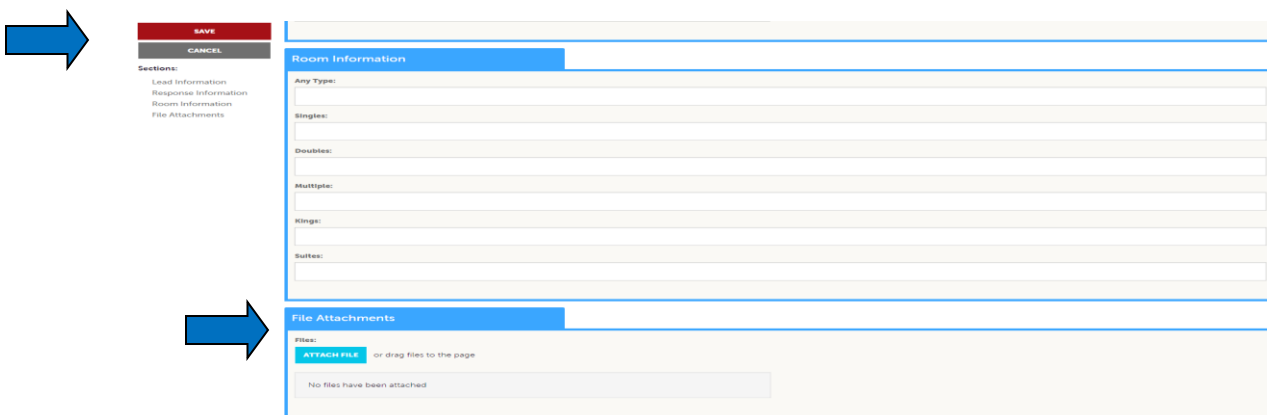
Doubles:

Multiple:

Kings:

Suites:

5. 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 Visit Fort Worth will decide whether or not to pass these files to the meeting planner.



**SAVE**

**CANCEL**

**Sections:**

- Lead Information
- Response Information
- Room Information
- File Attachments

**Room Information**

Any Type:

Singles:

Doubles:

Multiple:

Kings:

Suites:

**File Attachments**

Files:

**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!**