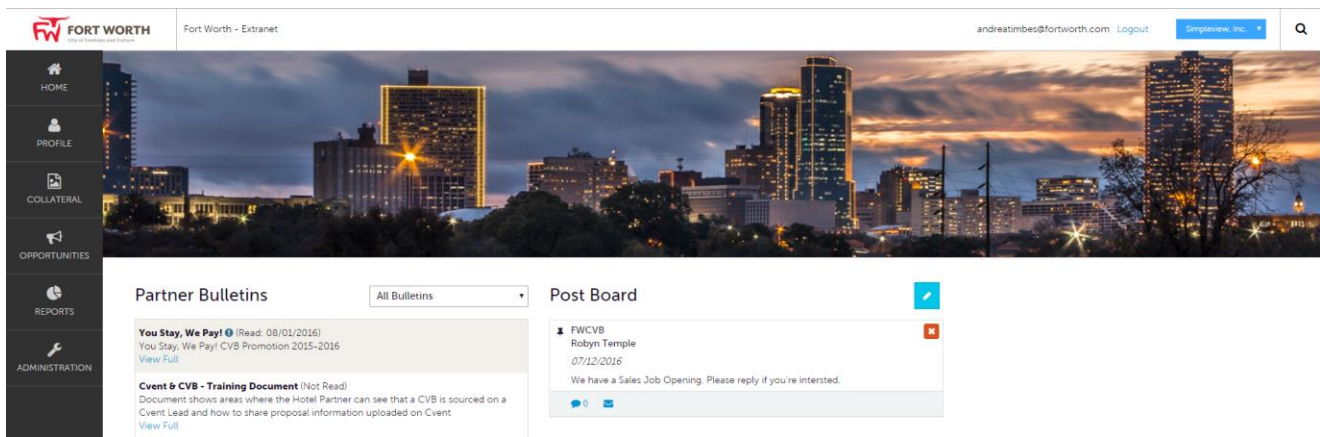




Fort Worth Convention & Visitors Bureau  
111 W. 4th Street | Suite 200 | Fort Worth, Texas 76102-3951

## Partner Portal Instructions

<http://www.fortworth.extranet.simpleviewcrm.com>



Once you have logged into the Partner Portal; depending on your level of access you will be able to view your account information and contact information, view and respond to leads and service requests, submit Events, order CVB resource material, view Reports and review Partner Bulletins.

### Viewing Partner Bulletins:

The Partner Bulletins allows the CVB to post updates/information to the Partner Portal. The bulletins can include a single file attachment, a title, bulletin text, and they are grouped or organized by Categories – Responses, Updates, Training Documents, Worth Doing Document.

Default View: This will show the 10 most recent bulletins that are active and within the publish-dates, this will be order by created date (This is date shown on right side). The Blue “Exclamation Point Icon” is the “Important” bulletin.

### Viewing Post Board:

Post Board allows a user to communicate with other properties within their destination. Clicking on the caption bubble icon allows a user to reply to a post. Clicking on the email icon allows a user to contact the poster via email.

### Viewing Your Leads and/or Service Requests:

Click on the **Opportunity** button in the left side navigation menu. This will display all leads sent to your property from the Fort Worth Convention and Visitors Bureau.

- Select Filters allow you to view different lead statuses, i.e. all leads, new leads (open), pending leads (open/bid sent), closed/won/lost
- You are able to sort your list of leads by clicking on any of the column headers (i.e. Lead Name, Organization, etc.)
- If you select “Open Leads,” that will show the leads that your establishment has NOT responded to.

### Viewing Reports:

Reports can be made available to our partners on the partner portal, i.e. RUR, Convention Calendar

## Viewing Your Member Profile

Click on the **Profile & Collateral** button in the left side navigation menu. This will display the details on file for your Partner account with the Fort Worth CVB. Adding and/or editing in the Collateral section will be pending until a representative of the Fort Worth CVB approves them. You cannot alter a pending status.

### - Profile:

#### 1. Account

The Account tab provides you with account information on file with the Fort Worth CVB, social media links and amenities associated with your property. You have the ability to manage the above listed and update as needed.

- a) *Social Media* - This section allows you to update the Social media account links for your business. Just add the URL in the field for the appropriate service and click the save button.
- b) *Amenities* - There are 2 sections available to you for promoting your venue – Amenities & Meeting Space. To edit this information, use the dropdown arrow under actions, select the appropriate section, make your edits and click the save button.

#### 2. Contacts

The Contacts section provides you a list of the contacts on file with the Fort Worth CVB and their status. You have the ability to manage the contact's status, contact information, and to create new contacts.

#### 3. My Benefits

This is much like a partner report card. It provides information on what the bureau is doing for you, such as:

- a) *Listing/Offers/Advertising Opportunities/Press Mention* - you can view the number of times your listing, etc. has been viewed through the FWCVB website along with click-throughs' to your property website from the listing
- b) *Leads/RFPs* - This section shows for hotels only, in response to Group Sales and/or Leisure Group Sales Leads distributed to them.
- c) *Service Requests* - This section allows you to see how many times your listing was referred to someone through various categories. It also allows you to see how many Service Requests were sent to your property to assist with Group Sales or Leisure Group Sales related requests.
- d) *Events/FAM Trips/Inkind & Expenses* – you can view how many events/FAM trips you attended, and what the Fort Worth CVB has spent and/or contributions that you have provided.

#### 4. Invoices

The Invoice tab will provide you with any outstanding or paid invoices, and will allow you to make an online payment for outstanding dues/invoices/materials.

### - Collateral:

#### 1. Listings (Website)

The listings section provides you information about your listing on our website. You have the ability to manage your description displayed on our website, category (i.e. Attractions), sub-category (i.e. museum) and images.

#### 2. Special Offers

This feature provides partners the opportunity to create and update special offers (coupons) to be displayed on the website in association with their listings.

#### 3. Calendar of Events

This feature allows partners the opportunity to create and update calendar events to be displayed on the website in association with their listings.

#### 4. Media

This feature provides partners the opportunity to manage and upload images to be displayed on the website in association with their listings/events/special offers. If you have any images already uploaded, you will see them once you filled out the mandatory fields. They may be GIF or JPEG, and no larger than 1200w x 844h (pixels). Images have to be uploaded prior to creating a listing/event/special offer.

#### 5. Material Requests

This feature allows partners the opportunity to order pre-selected materials (i.e. Maps, Brochures, etc.) from available Fort Worth CVB inventory. Upon clicking the Save button, the Bureau will be notified of your request.