



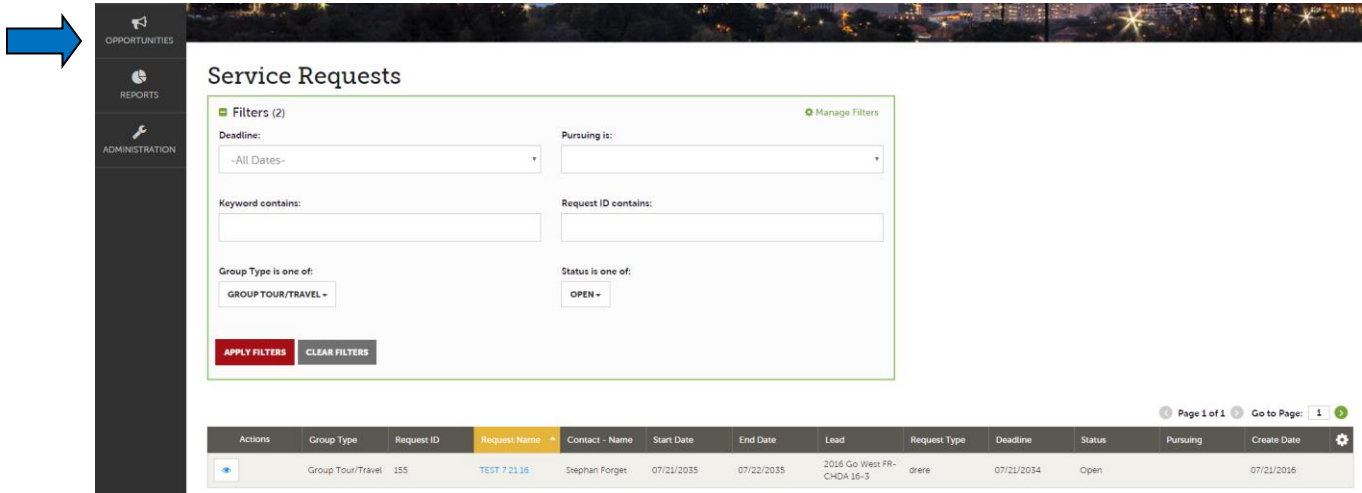
**Fort Worth Convention & Visitors Bureau**  
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# Partner Portal Instructions Reviewing and Responding to Service Requests

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## Reviewing Service Requests:

By clicking the “RFP icon” and then selecting “Service Requests”, you can view non-room night specific Leads sent to your property. These requests can range from transportation, audio/visual, catering and/or overflow rooms, etc.



The screenshot shows a web application interface for "Service Requests". On the left is a navigation menu with "OPPORTUNITIES", "REPORTS", and "ADMINISTRATION". The main content area has a "Service Requests" header and a filter panel. The filter panel includes fields for "Deadline" (set to "-All Dates-"), "Pursuing is:" (empty), "Keyword contains:" (empty), "Request ID contains:" (empty), "Group Type is one of:" (set to "GROUP TOUR/TRAVEL"), and "Status is one of:" (set to "OPEN"). Below the filters are "APPLY FILTERS" and "CLEAR FILTERS" buttons. At the bottom, a table displays one record with the following data:

Actions	Group Type	Request ID	Request Name	Contact - Name	Start Date	End Date	Lead	Request Type	Deadline	Status	Pursuing	Create Date
	Group Tour/Travel	155	TEST 7.21.16	Stephan Forget	07/21/2035	07/22/2035	2016 Go West FR-CHDA 16-3	drere	07/21/2034	Open		07/21/2016

The filters in this grid determine what Service Requests 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 Service Requests.

- **LEAD STATUS DEFINITIONS**

- **Closed / No Bid Sent:** These requests 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 requests in a pending status that your property has not bid on and the response due date has not passed.
- **Open / Bid Sent:** These are requests 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 requests can be pending, Definite, Lost or Cancelled. The Turned Down status signifies you responded to the requests, 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 requests you were pursuing, but the business has been lost.
- **Closed Cancelled:** These are Le requests ads where you won the business, but the group has cancelled.
- **Closed / Won:** These are definite requests in which your property was selected.
- **Closed Lost:** These are definite requests in which your property was not selected for the business.

## Reviewing the Service Request

You are able to sort your list of requests by clicking on any of the column headers (i.e. Request ID, Request Name, etc.). Click on the Name or ID to open and respond to the request. All responses must be entered by the Deadline Date.

Once you have adjusted the filters as you prefer, click the “eyeball icon” to view details information about the service requests or click the name of the request.

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**RETURN**

### Sections:

- Request Information
- Request Dates
- Contact Information
- Accounts/Responses
- Transportation
- Tour Guide
- Restaurants
- Attractions & Activities



When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads.

If the Response Due Date has not passed, you are able to add/edit a response by clicking the Pencil icon in the Accounts/Responses section of the service request. Once clicked, you can tell the Bureau if you are pursuing this piece of business by clicking the Yes or No option in the Pursuing section to the right side of the page.

Accounts/Responses

Colored fields are required.

Actions	Company	Status	Pursuing?	Comments
	FWCVB	Open	No Response	



## Add a Response

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

Response for FWCVB ✕

**Pursuing:** ◀Required

YES  NO

**Comments:** ◀Required

**Bureau-Only Comments:**  
These comments will not be seen by the client. They will only be seen by bureau staff.

[ATTACH A FILE](#)

No files have been attached

[UPDATE](#) [CANCEL](#)

1. Items in **red** are required fields.
2. The **Comments** section can be used to respond to any specifics from the Request.
3. The **Bureau-Only Comments** entered in the Bureau only comments field will not be shared with the meeting planner or request contacts
4. **File Attachments** - You can attach files which will be sent to the CVB. The CVB will decide whether or not to pass these files to the meeting planner.