

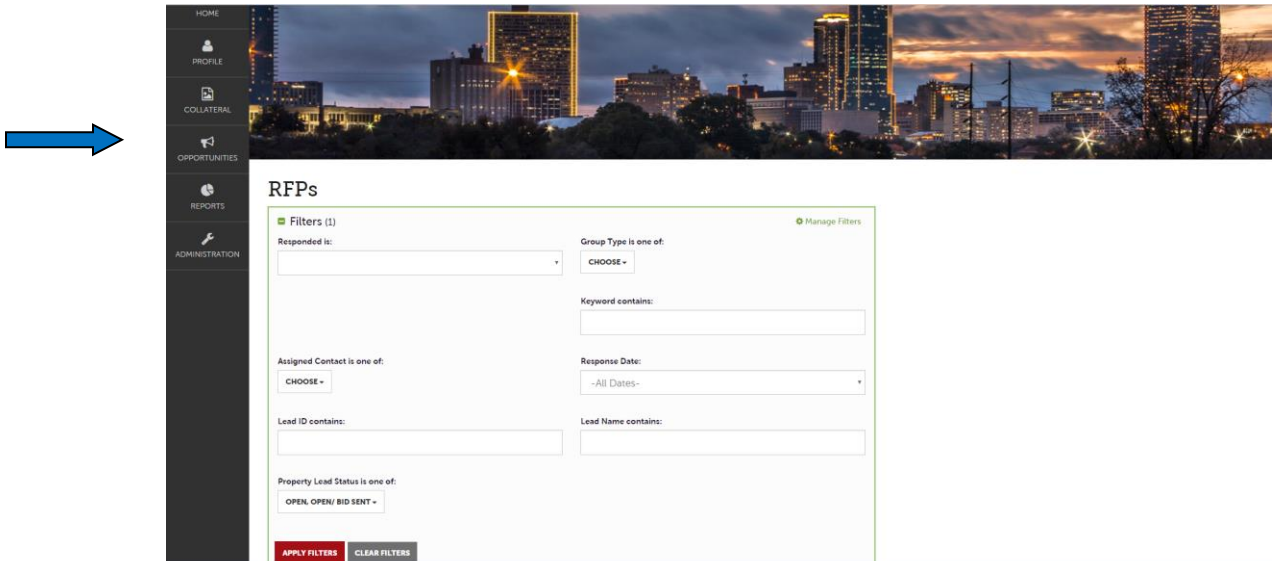


Fort Worth Convention & Visitors Bureau
111 W. 4th Street | Suite 200 | Fort Worth, Texas 76102-3951

Partner Portal Instructions
Reviewing and Responding to
C V E N T Leads
(Meeting Sales – View, Assign and Respond)

Opportunities / Leads:

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



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.

Reviewing Leads (Meeting Sales)

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 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.

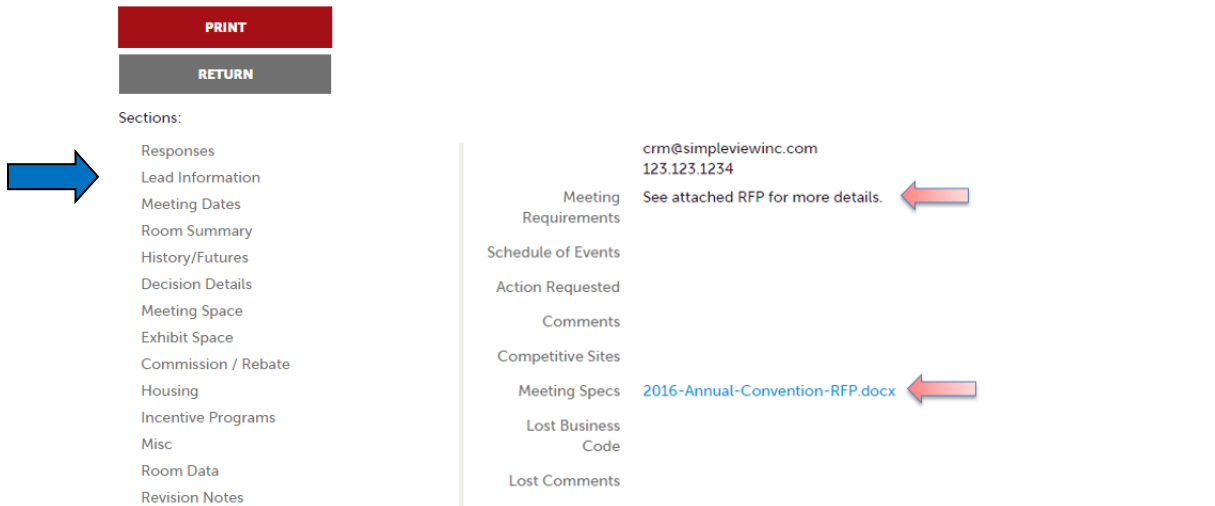
Actions	Group Type	Lead ID	Lead Name	Organization	Response Date	Arrival (Preferred)	Departure (Preferred)	Property Lead Status	Responded	Create Date	Assigned Contact
	Meeting	17330	test for Partner Portal Launch 4.0	Fort Worth Convention and Visitors Bureau	12/01/2042	12/01/2043	12/03/2043	Open	No	07/20/2016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

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

1. Reviewing the Meeting Sales 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; attachments will be found in the Meeting Specs field.

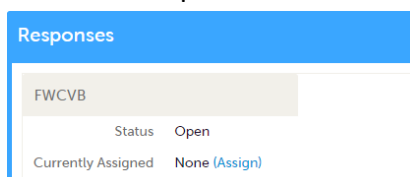
Lead Details



The screenshot shows the 'Lead Details' interface. At the top, there are two buttons: a red 'PRINT' button and a grey 'RETURN' button. Below these is a 'Sections:' label followed by a list of navigation items: Responses, Lead Information, Meeting Dates, Room Summary, History/Futures, Decision Details, Meeting Space, Exhibit Space, Commission / Rebate, Housing, Incentive Programs, Misc, Room Data, and Revision Notes. A blue arrow points to the 'Lead Information' item. The main content area on the right lists several sections: Meeting Requirements (with email 'crm@simpleviewinc.com' and ID '123.123.1234'), Schedule of Events, Action Requested, Comments, Competitive Sites, Meeting Specs (with attachment '2016-Annual-Convention-RFP.docx'), Lost Business Code, and Lost Comments. Red arrows point to the 'See attached RFP for more details.' text and the attachment name.

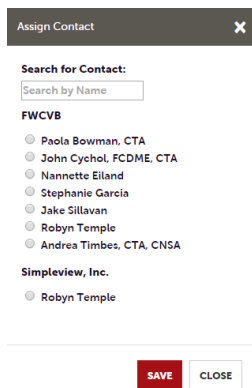
2. Assigning the Meeting Sales Lead

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



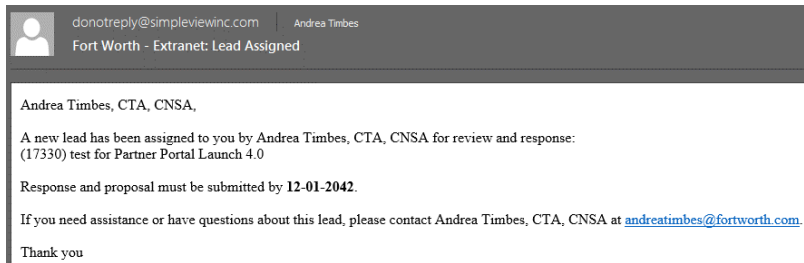
The screenshot shows the 'Responses' section. At the top is a blue header with the text 'Responses'. Below it is a grey box containing the lead ID 'FWCVB'. Underneath, there are two fields: 'Status' with the value 'Open' and 'Currently Assigned' with the value 'None (Assign)'.

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



The screenshot shows the 'Assign Contact' dialog box. It has a title bar with 'Assign Contact' and a close button. Below the title bar is a search field labeled 'Search for Contact:' with the placeholder text 'Search by Name'. Underneath the search field is a list of sales managers under the heading 'FWCVB': Paola Bowman, CTA; John Cychol, FCDME, CTA; Nannette Eiland; Stephanie Garcia; Jake Sillavan; Robyn Temple; and Andrea Timbez, CTA, CNSA. Below this list is another heading 'Simpleview, Inc.' with the name 'Robyn Temple' listed underneath. At the bottom of the dialog are two buttons: a red 'SAVE' button and a white 'CLOSE' button.

- 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

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 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

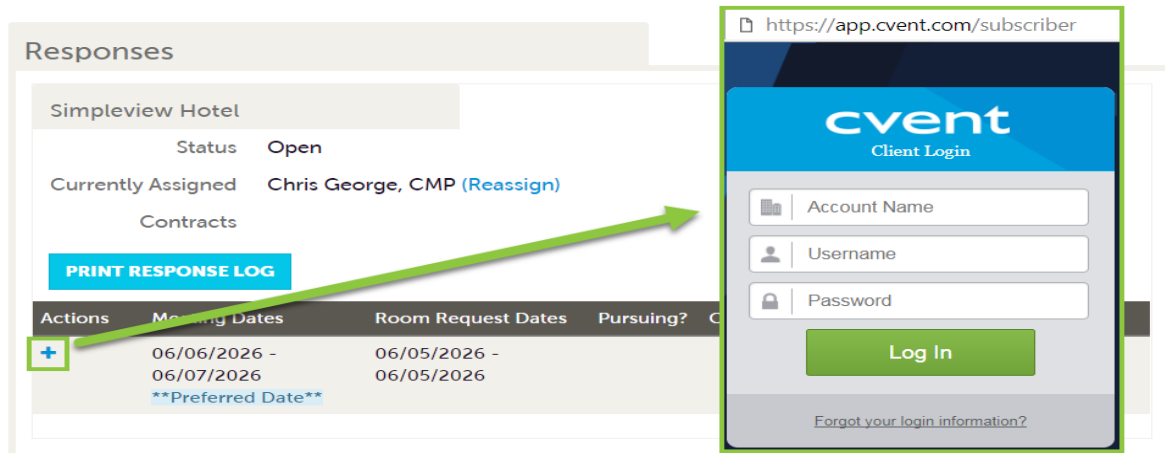
Status: Open

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		

b) You will now be re-directed to the Cvent Website Login



c) Follow your normal Cvent proposal procedure.

d) Please ensure to select "Allow CVB's/DMO's in my metro area to view this proposal if they were copied on the RFP by the planner".

- If you do not allow us to view the proposal, we will have to reach out to you and ask for the information.

Tips & Reminders:

- 1) Remember to assign a Sales Manager to the lead if you are **NOT** responding via the Partner Portal on Cvent!
- 2) Remember to allow the CVB to view your proposal once submitted!
- 3) Any questions about the lead, please direct to the FW CVB Sales Manager!
- 4) Any questions about the Partner Portal or Cvent, reach out to Andrea!