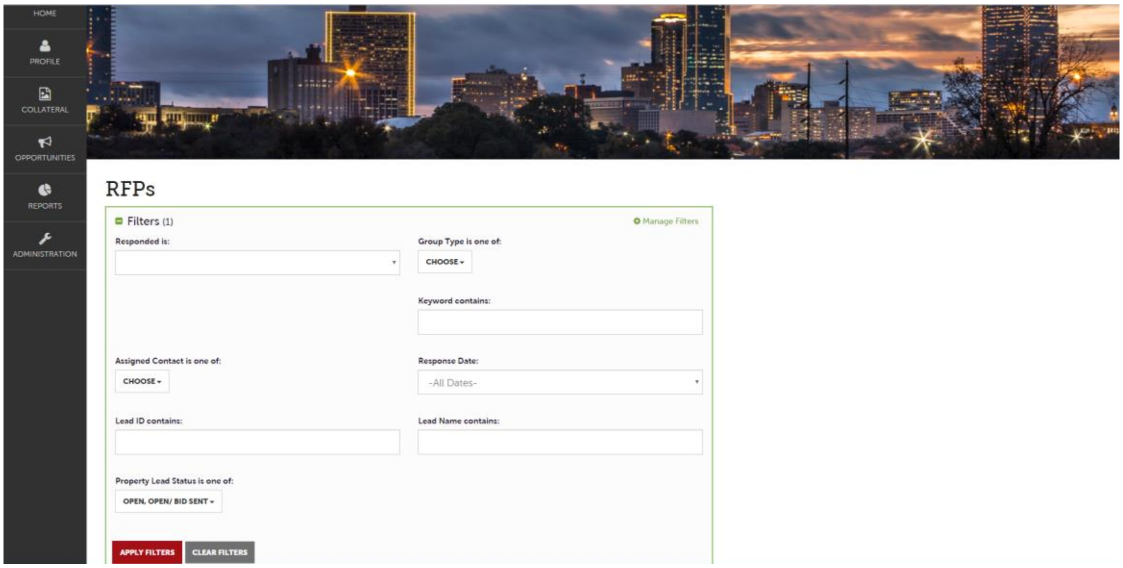
FORT WORTH
City of Cowboys and Culture

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.

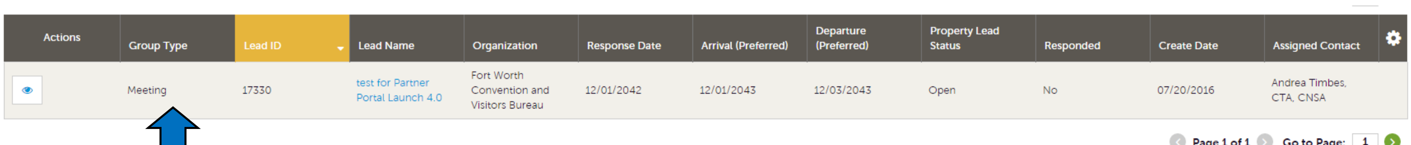


The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the “Apply Filters” button. By Default, you will see all of your Open Leads and Opens Leads you have already bid on.

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.

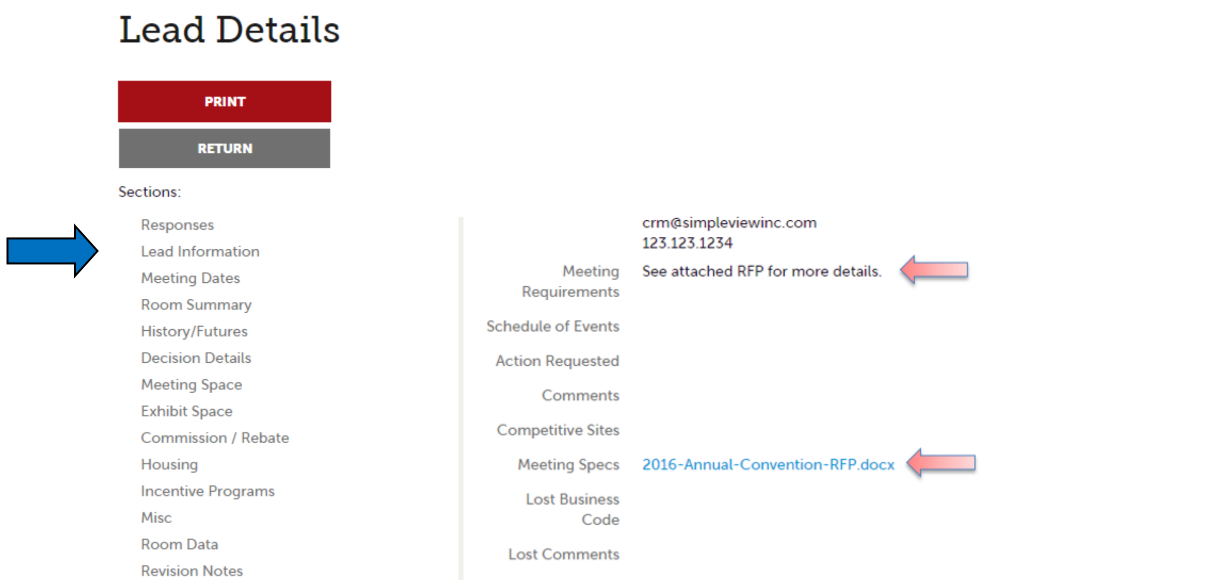
You are able to sort your list of leads by clicking on any of the column headers (i.e. Opportunity Name, Organization, etc.). Click on the Lead Name or ID to open and respond to the lead. All responses must be entered by the Hotel Responses Due Date.



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

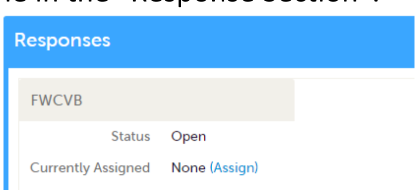
1. Reviewing the Meeting Sales Lead

When viewing the Lead, you can skip to 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.

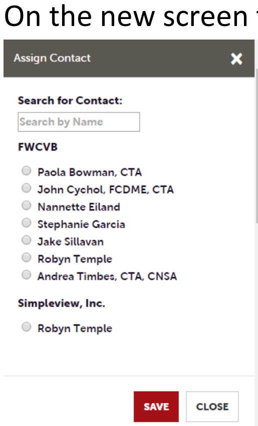


2. Assigning the Meeting Sales Lead

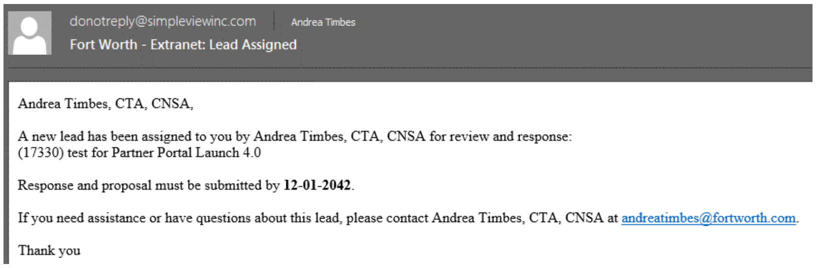
The property lead catcher will need to assign the lead to the appropriate Sales Manager. This can be done in the “Response Section”.



- 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



donotreply@simpleviewinc.com | Andrea Timbes
Fort Worth - Extranet: Lead Assigned

Andrea Timbes, CTA, CNSA,

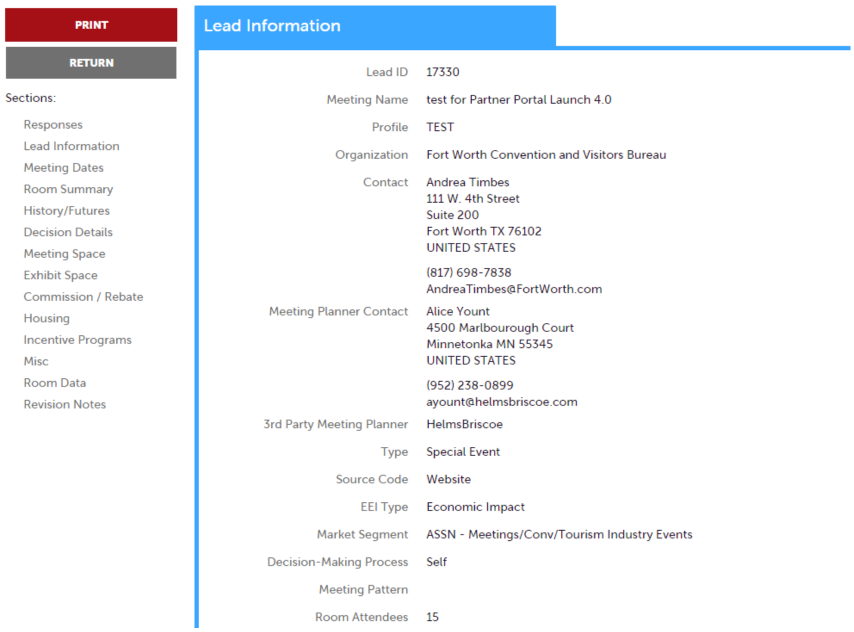
A new lead has been assigned to you by Andrea Timbes, CTA, CNSA for review and response:
(17330) test for Partner Portal Launch 4.0

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

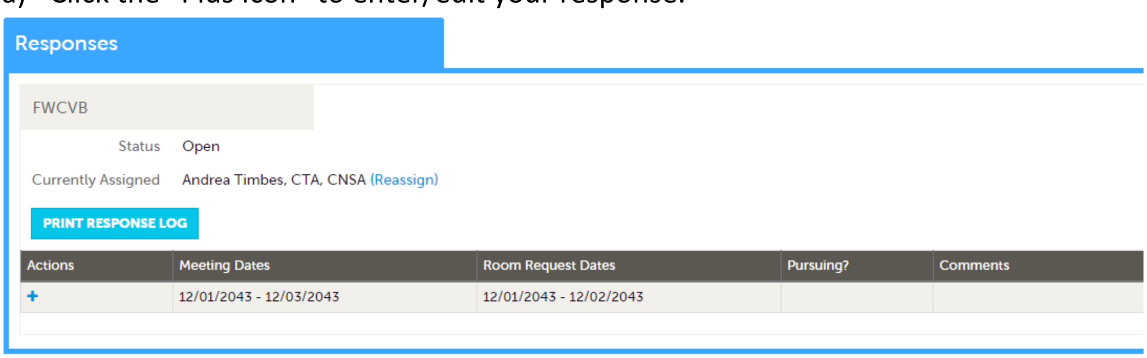


3. Add a Response for a Meeting Sales Lead

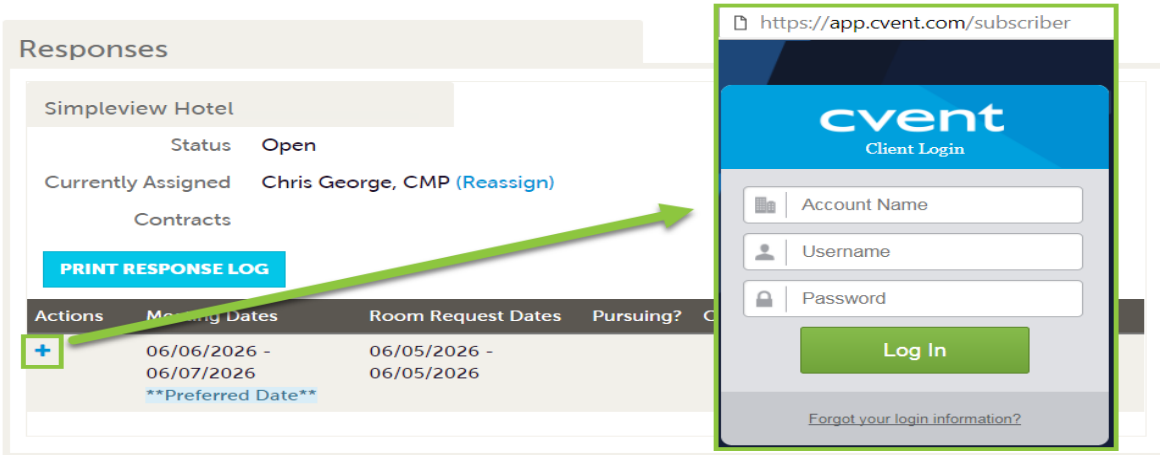
After you have reviewed the Lead, scroll **up** to the Responses section. Here you will see options to either add or edit your existing response.

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

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



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 able the lead, please direct to the FW CVB Sales Manager!
4) Any questions about the Partner Portal or Cvent, reach out to Andrea!