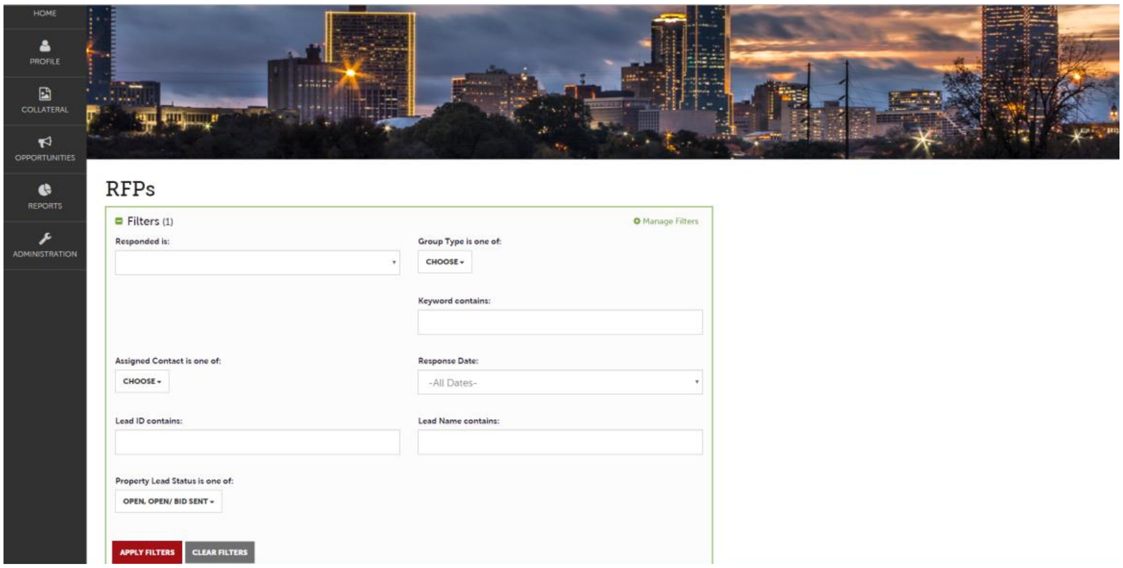
FORT WORTH
City of Cowboys and Culture

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

Partner Portal Instructions
Reviewing and Responding to Leads
(Meeting Sales – View, Respond and Pick-up)

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.



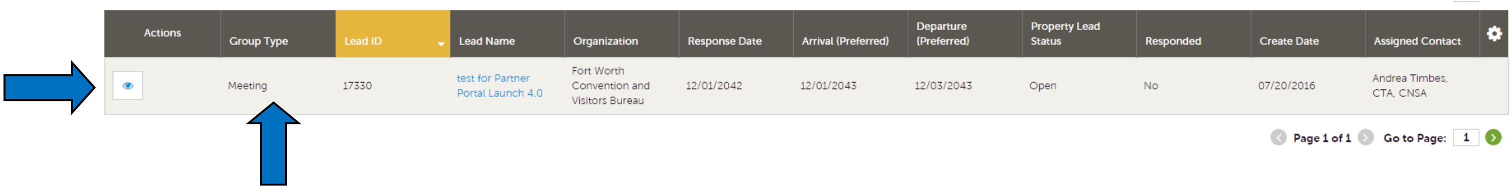
The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the "Apply Filters" button. By Default, you will see all of your Open Leads and Opens Leads you have already bid on.

- **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 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 or Tour Lead.

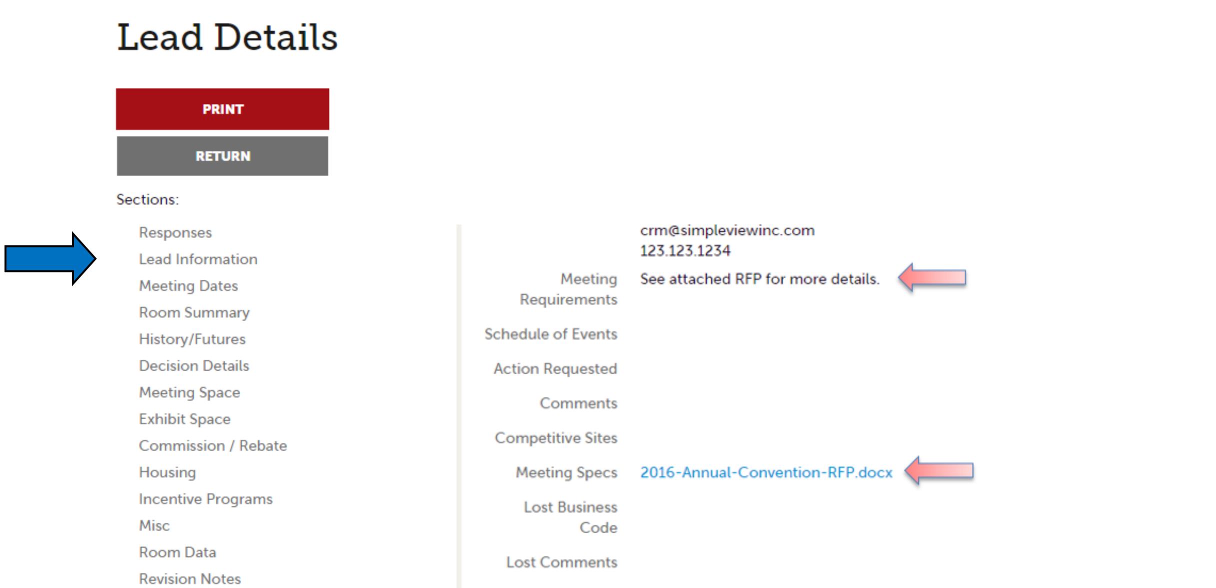
You are able to sort your list of leads by clicking on any of the column headers (i.e. Opportunity Name, Organization, etc.). Click on the Lead Name or ID to open and respond to the lead. All responses must be entered by the Hotel Responses Due Date.



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

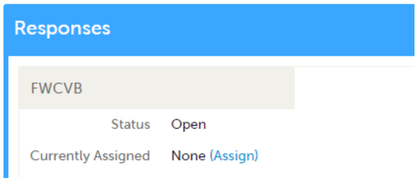
1. Reviewing the Meeting Sales Lead

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.

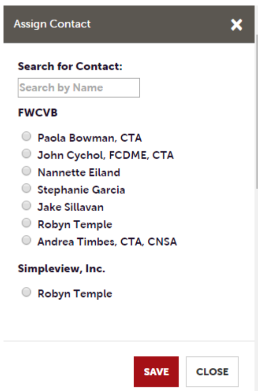


2. Assigning the Meeting Sales Lead

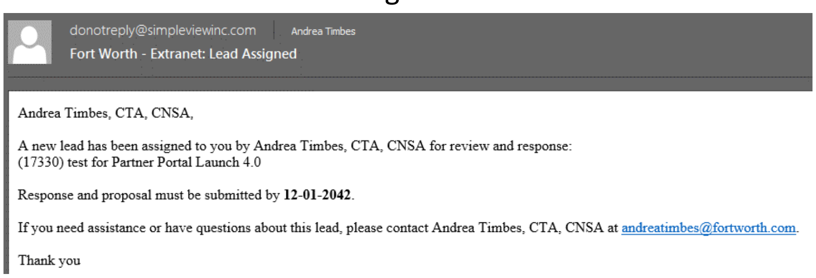
The property lead catcher will need to assign the lead to the appropriate Sales Manager. This can be done in the “Response Section”.



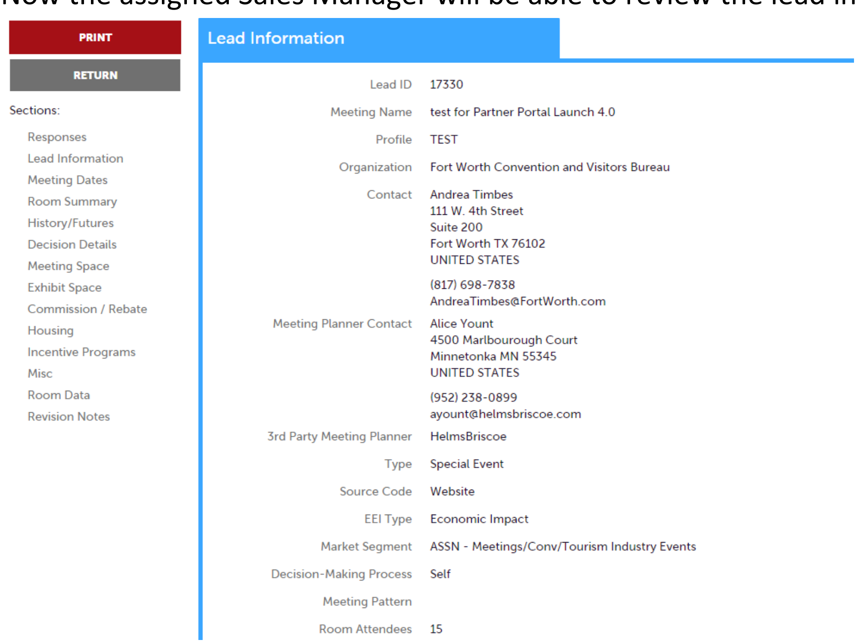
- Select “Assign”
- On the new screen to your right, select the Sales Manager who should receive this lead



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



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

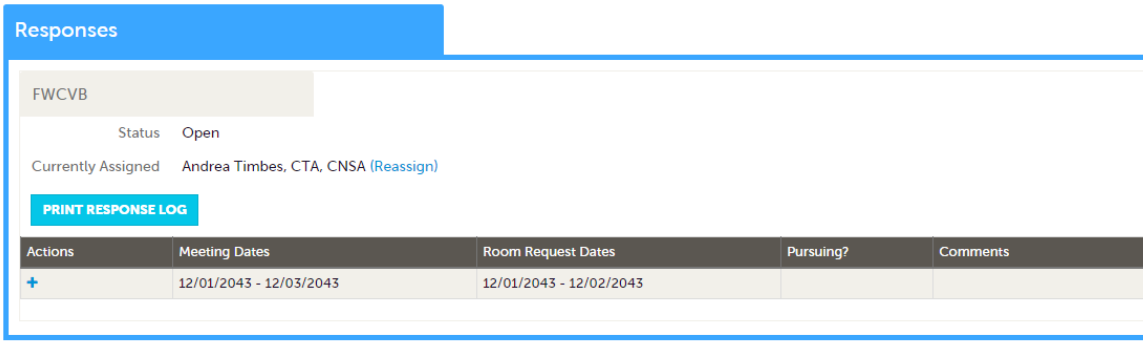


3. Add a Response for a Meeting Sales Lead

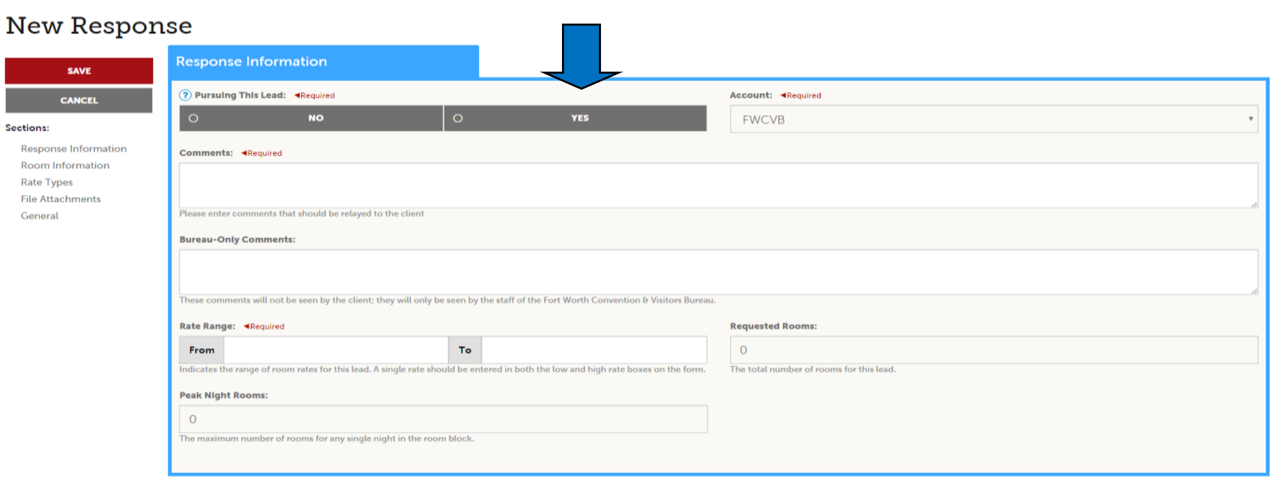
After you have reviewed the Lead, scroll **up** to the Responses section. Here you will see options to either add or edit your existing response.

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

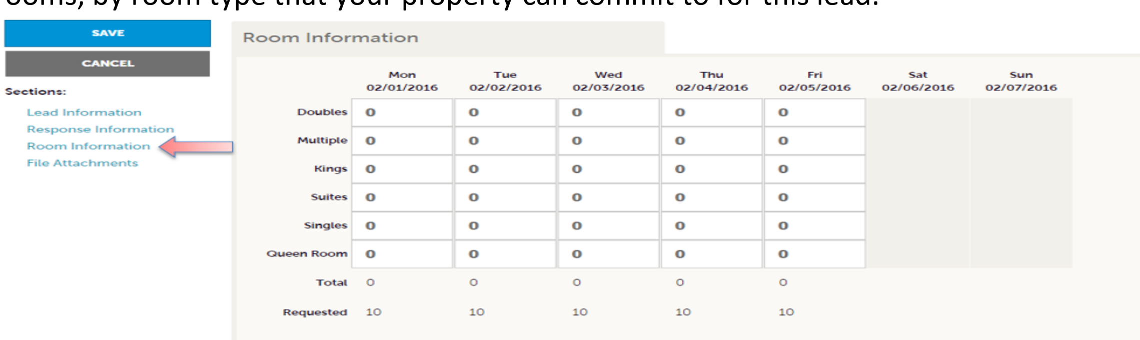
Click the “Plus Icon” to enter/edit your response.



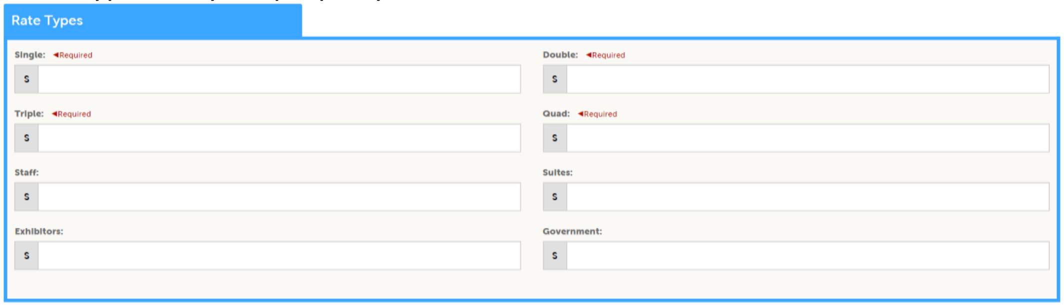
Data entered in the response form is send directly to the Fort Worth CVB for review. The response form is used to send comments, room rates, room block information, and any file attachments that you wish to include.



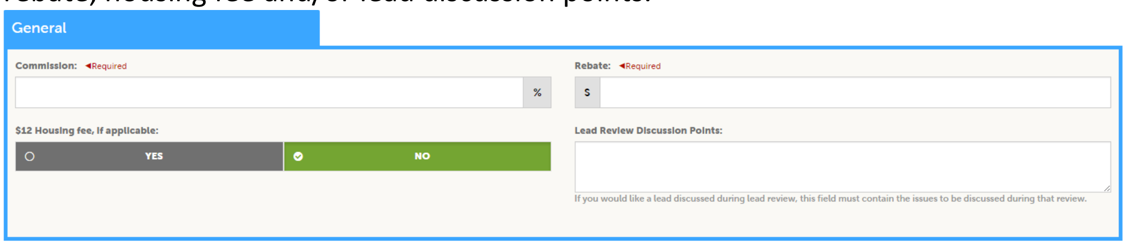
1. Items in red are required fields.
2. When adding/editing your response, you will need to tell the Bureau if you are pursuing (***bidding***) the Lead by selecting “Yes or No” to the “Pursuing this Lead Option”
3. The Comments section can be used to respond to any specifics from the Lead.
4. The Room 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.



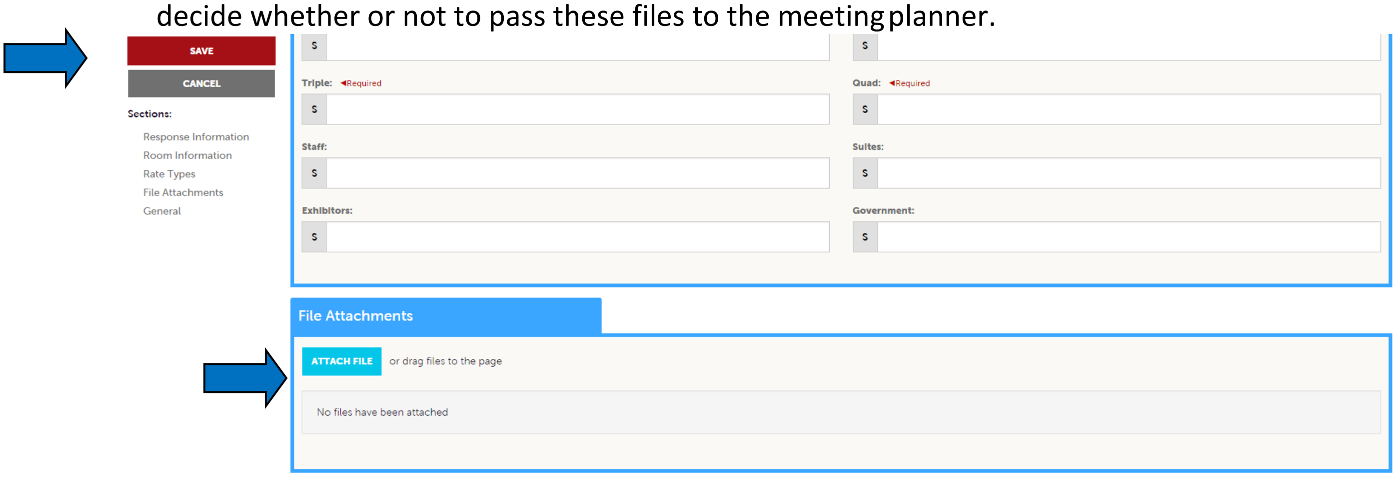
5. The Rate Type section of the response page is where you can enter the rates for each room type that your property can commit for this lead.



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



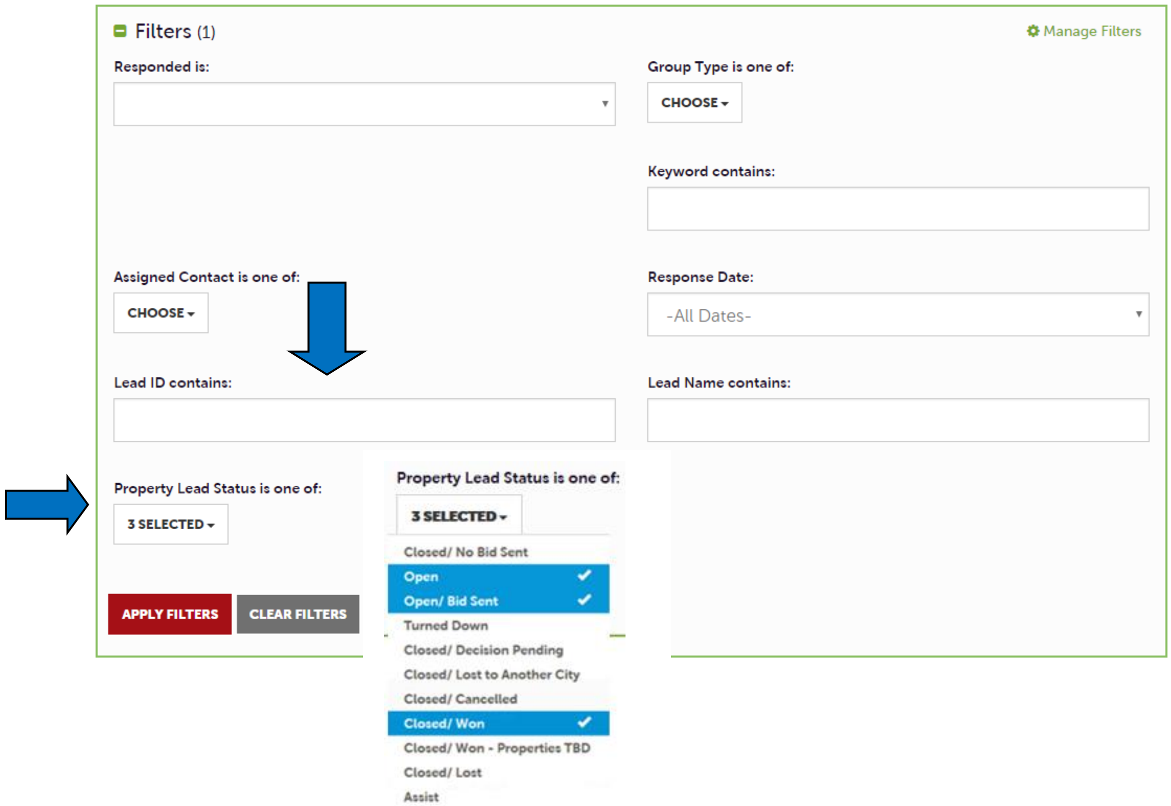
7. File Attachments – here you will be able to attach a proposal to your response by clicking on the “Attach File” button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section The CVB will decide whether or not to pass these files to the meeting planner.



<u>Once you have finished entering all your response information don’t forget to click the save button!</u>

4. Reporting Meeting Sales Lead Pick-up

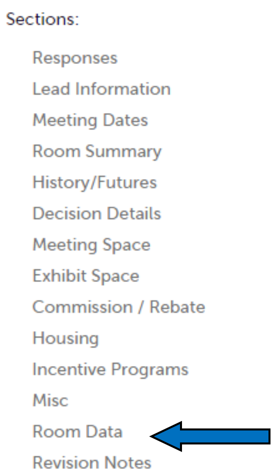
A part of your Lead process may be to add room Pickup information. This data can only be added to RFPs that your Property has won and if the DMO has identified you as a Pickup Manager.



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

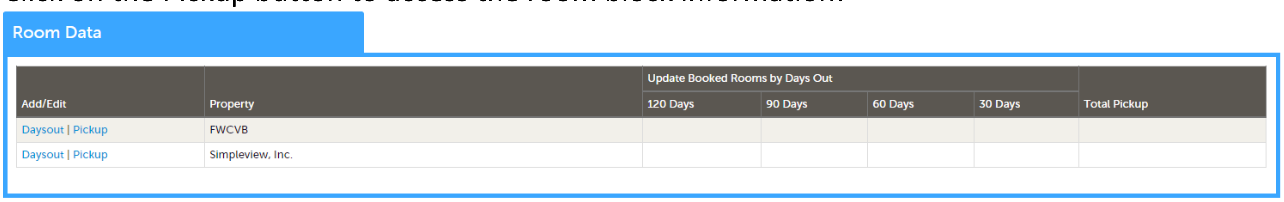
To access the Lead, click on the Eyeball icon or the Lead Name.



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

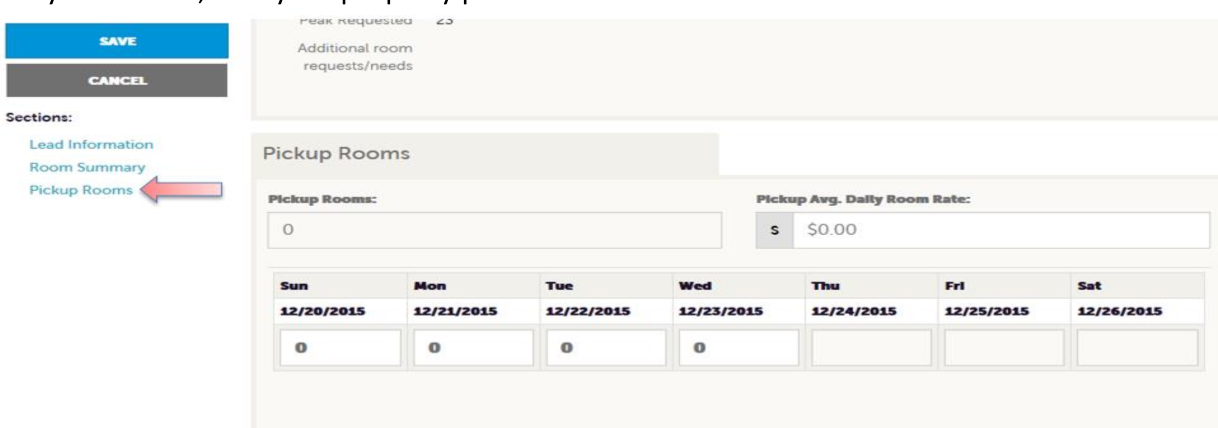
a) Click on the Pickup button to access the room block information.



Room Data

Add/Edit	Property	Update Booked Rooms by Days Out 120 Days	90 Days	60 Days	30 Days	Total Pickup
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



Be sure to click the Save after you have supplied the appropriate room information.