caterease™

catering & event management software

Training Guide

Managing Prospective Leads in Prospect Manager

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Unit 1: Adding a New Prospect in Prospect Manager

Prospect Manager allows you to maintain a detailed database of leads, separate from your accounts in Account Manager. You can track your history with these leads, including your next action and its action date, and then quickly promote those leads to active accounts whenever they are ready to accept a proposal for an event. Prospect Manager gives you the power to manage your leads from start to finish, in that you have a dynamic import tool in which to pull customers into the program, and the capability to generate batch prints or e-mails to market to an entire group of leads.

Objectives:
Upon completing this unit, you will be able to:

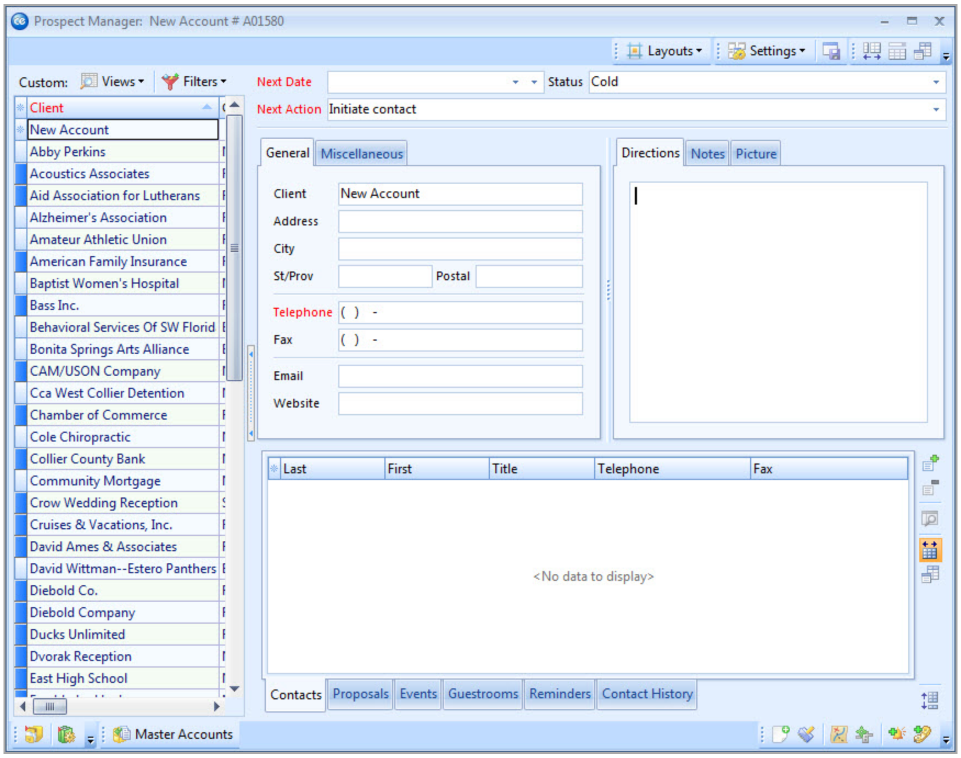
- *Add a new prospect to Prospect Manager.*
- *Add a contact person to a prospective account.*
- *Complete miscellaneous information pertaining to the prospect.*
- *Use the Copy to Client feature to add a person as both the prospect and contact person.*
- *Add quickpick items for the status, next action, and proposal status.*
- *Create and display user-defined fields.*
- *Establish New Booking Defaults in Prospect Manager.*
- *Designate Required Fields and Conditionally Required Fields in Prospect Manager.*

Adding a New Prospect in Prospect Manager

The process of adding prospects and accounts is exactly the same; it is only in concept that they differ. For example, you will find the steps below to be the same steps you would follow if you were adding an account in Account Manager. Here, however, we are discussing prospects. Prospects are your leads: companies or individuals that are not yet your active accounts. Prospect Manager allows you to maintain a database of prospective clients. When a prospect becomes an active account, a simple mouse click allows you to send the prospect (or an entire group of prospects) into your Account Manager. There is no repetitive typing, ever.

__Tip__: Once you have added your new prospect, you will probably want to add information about a specific contact person.

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Click the **Add Record** button, located in the main toolbar at the top of your Caterease screen.
   Result: *A confirmation message appears.*
3. Click **Yes** to confirm your choice.
   Result: *A new account is added, with the default name of "New Account."*
   Note: *If your new prospective customer is an individual (as opposed to a company), see* "Adding a Customer Who Is Not a Company," below.



4. Type the name of your new prospect into the Client field, and press **[Tab]** or **[Enter]** to move to the next field.
   Result: *The name you type replaces the default name "New Account."*
   Note: *You can add, remove, or rearrange fields on this and other areas of the screen.*

5. Continue to fill out the fields on the **General** tab as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.

6. **[Optional]** On the **Miscellaneous** tab, located to the right of the **General** tab, type into a field or click the down arrow to the right of each field to make a choice from the corresponding quickpick lists.
   Note: *These fields are used for tracking your prospects, and are entirely optional. Also available (by default) on this tab is the option to make a client tax exempt by clicking the **Tax Exempt** checkbox.*

7. **[Optional]** Click the **Directions** tab and type into the text block as desired if you wish to include directions to this prospect's facility.
   Note: *You may also paste copied directions into the text block.*

8. **[Optional]** Click the **Notes** tab and type any notes into the text block as desired.

9. **[Optional]** Click the **Picture** tab, then right-click within the white text block area and choose **Load From File** if you wish to include a digital image to associate with this prospect.

Adding a Customer Who is Not a Company

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Click the **Contacts** tab, located at the bottom left-hand side of the Prospect Manager screen, if it is not already selected.

3. Click the **Add a New Contact** button , located at the right-hand side of the screen.
   Result: *The Contact window opens.*

4. Type the contact person's last name into the Last Name field, and press **[Tab]** or **[Enter]** to move to the next field.

5. Type the contact person's first name into the First Name field, and press **[Tab]** or **[Enter]**.

6. Type the salutation into the Salutation field.
   Note: *Examples include John, Mr. Smith, Dr. Jones, etc.*

7. Click the down arrow to the right of the Title field and select an option from the customizable quickpick list.

8. Continue to fill out the fields on the **General** tab as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.

9. **[Optional]** Click the **Credit Card Information** button  and complete the credit card information for the contact.

10. **[Optional]** Click the **Notes** tab and type any desired note pertaining to this contact person.
    Note: *These notes do not print anywhere; they are merely here as an on-screen reference. You can format the text by highlighting the text, clicking your right mouse button, and choosing **Font**.*

11. **[Optional]** Click the **Picture** tab, then right-click within the text block and choose **Load From File** if you wish to include a digital image to associate with this prospect.

12. Click the **Copy To Client** button, located on the top right of the New Contact window.
    Result: *All name and address information from the contact person is copied into the respective fields for the client.*
    Note: *If any client information already exists, you will be prompted to confirm you want it overwritten.*

13. Click **OK** to close the Contact window.

Fields Available in Prospect Manager

Field	Description
Client*	Identifies the name of the prospect.
Address*	Identifies the customer's address.
Address (Other)	Offers an optional address field; available as a sub-field of the Address field.
City*	Identifies the city where the customer resides.
St/Prov*	Identifies the state or province where the customer resides.
Postal*	Identifies the postal code or ZIP code for the customer.
Telephone*	Identifies the customer's telephone number; will be formatted as per your program's Global Settings.
Telephone (Other)	Offers an optional additional phone number field; will be formatted as per your program's Global Settings; available as a sub-field of Telephone.
Fax*	Identifies the fax number of the client; will be formatted as per your program's Global Settings.
Cellular	Identifies a cellular phone number for the client; will be formatted as per your program's Global Settings.
Country	Identifies the country where the customer resides.
Email*	Identifies the customer's e-mail address.
Website*	Identifies the website address of the customer.
Contact Time Preference	Identifies the preferred time to be contacted: Morning, Afternoon, Evening.
Contact Type Preference	Identifies the preferred contact type: Phone, E-mail.
County	Identifies the county where the customer resides.
Category**	Allows you to separate customers by category, for tracking purposes. Examples include "Corporate," "Government," "Educational," etc.
Reference**	Allows you to accurately track your marketing strategies by identifying how the customer heard of you originally (as opposed to why they might book individual events with you in the future)
Description**	Allows you to further distinguish between customers, for tracking purposes. For example, you might have customers with a Category (see above) of "Corporate" AND a Description of "Association Member."
Sales Representative**	Identifies a sales representative linked to the customer.
Tax Exempt**	Allows you to designate every future event for this customer as tax exempt.
Exempt Number**	Identifies a Tax Exempt ID Number for a tax-exempt customer; available as a sub-field of the Tax Exempt field.
Expires**	Allows you to enter an expiration date for the client's tax exempt number.
Account ID	Allows you to enter a custom ID number for the customer.
Account #	Offers a unique identifier for the customer; automatically assigned by the program.
Group	Offers a custom quickpick list so multiple clients can be associated with a single group; e.g., different branches of a company or bank might be grouped by that company or bank's name.
Hold	Displays a checkbox to place a client on hold (meaning that client cannot book new events).
Hold Type	Offers a custom quickpick list of reasons the client was placed on "hold" (e.g., "Past Due Balance," "Seasonal," etc.).
Hold Date	Automatically notes the date and time a client was place "on hold."
Base Price Markup	Allows you to select a default "base price markup" schedule for the client, so that prices for any event booked by the client will be adjusted by a certain percentage automatically.

Field	Description
Tax Name	Allows you to select a default tax schedule for the client, so that any event booked by the client will default to those specific rates.
Pay Method	Allows you to establish a default payment method for all future events booked by the client.
Loyalty #	Allows you to enter a custom number to track customer loyalty; this number will default to each contact person for the client (but can be changed) and will default for each event the client or contact books.
Master Account	Displays the master account this client belongs to, if you have setup a master account relationship.
User Defined Fields	Allows you to create any unique fields you want to suit the needs of your particular company.
** Displayed on the General tab by default. ** Displayed on the Miscellaneous tab by default*	

Adding Contact People

If a prospective customer decides to book an event with your company, you can easily make that prospect into an active account in Prospect Manager, and all of your contact people and history notes will be passed into Account Manager (the main account maintenance module) along with it. Of course, you are always free to add additional contact people in Account Manager (or in Event Manager) as the need arises.

Adding Contact People to a Prospective Account

__Tip:__ You can click __Copy to Client__ at the top right of the New Contact window to copy all contact person details - name, address, phone, etc. - to the client (or prospect), so you do not have to type that information more than once. As a default, the name will copy in the format of Last Name First Name.

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Find the prospect to which you wish to add a contact person, or add a new one.
3. Click the **Contacts** tab, located at the bottom left-hand side of the Prospect Manager screen, if it is not already selected.
4. Click the **Add a New Contact** button , located at the right-hand side of the screen.
   Result*: The Contact window opens.*
5. Type the contact person's last name into the Last Name field, and press **[Tab]** or **[Enter]** to move to the next field.
6. Type the contact person's first name into the First Name field, and press **[Tab]** or **[Enter]**.
7. Type the salutation into the Salutation field.
   Note: *Examples include John, Mr. Smith, Dr. Jones, etc.*
8. Click the down arrow to the right of the Title field, and select an option from the drop-down quickpick list.

9. Continue to fill out the fields on the **General** tab as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.

10. **[Optional]** Click the **Credit Card Information** button and complete the credit card information for the contact.

11. **[Optional]** Click the **Notes** tab and type any desired notes pertaining to this contact person.
*Note: These notes do not print anywhere; they are merely here for your on-screen reference. You can format the text by highlighting the text, clicking your right mouse button, and choosing **Font.***

12. **[Optional]** Click the **Picture** tab, then right-click within the text block and choose **Load From File** if you wish to include a digital image to associate with this prospect.

13. When finished, click **OK**, located at the bottom of the form, to close the form and save your changes.
***Result**: The contact person's name appears in the grid.*

14. Continue adding contacts as desired.
***Note**: The first contact person entered is designated as the primary contact.*

Creating Quickpick Lists for Status, Next Action, and Proposal Status

Throughout your Caterease program there are several drop-down menus, or quick-pick lists, to assist you in data entry. These lists, which can be edited at any time, exist to save you the tedium of double data entry, and allow you to keep your data consistent. For example, rather than having to type "Follow up after Brochure" multiple times, you can simply pick it from your Next Action quickpick list.

Adding Quickpick Items to the Status, Next Action, and Proposal Status

1. Click the **Setup** sidebar and select **Quickpicks**.
***Result:** The Setup Quickpick Lists window opens.*

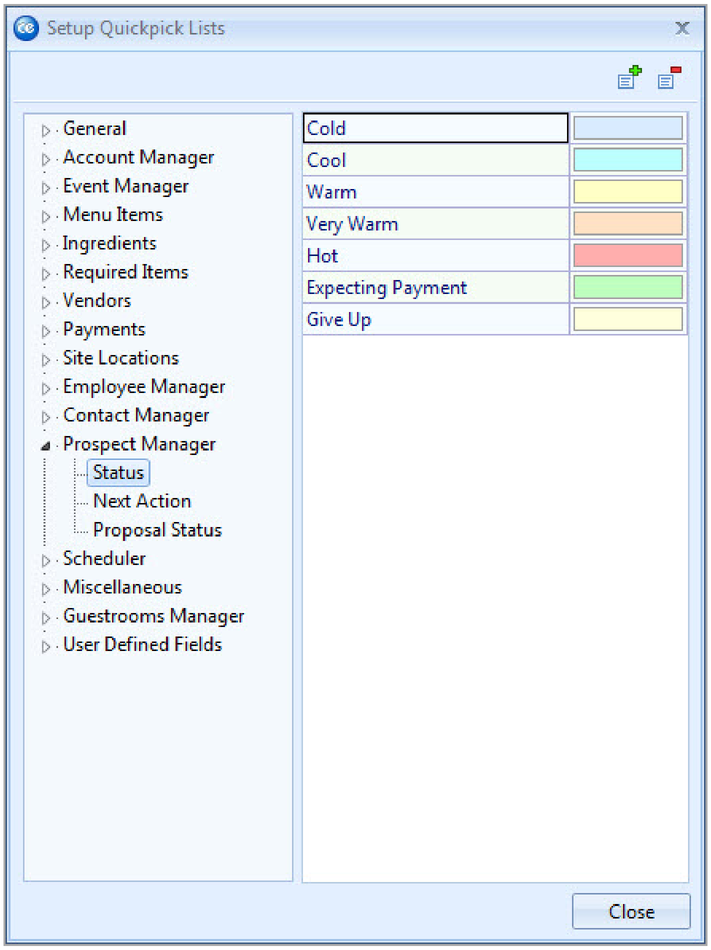
2. Click the **Expand** button , located next to the Prospect Manager category, and choose **Status**.

3. Click the **Add New Item** button , located at the top right-hand side of the form.
***Result**: A blank field appears.*

4. Type the name of your quickpick item into the field, and press **[Tab]** or **[Enter]**.

5. **[Optional]** Click inside the field and then click the down arrow to the right of the field to choose a default color for the new Status name.

   Note: *Access a custom color palette by clicking the **Ellipse** button* *, located to the right of the down arrow.*



6. Click **Next Action**, from the left-hand side of the window.

7. Click the **Add New Item** button , located at the top right-hand side of the form.
   Result: *A blank field appears.*

8. Type a name for your quickpick item into the field.

9. Click **Proposal Status**, from the left-hand side of the window, and add quick-picks to this category as described in Steps 7 and 8.

10. When finished adding quickpicks, click **Close**.

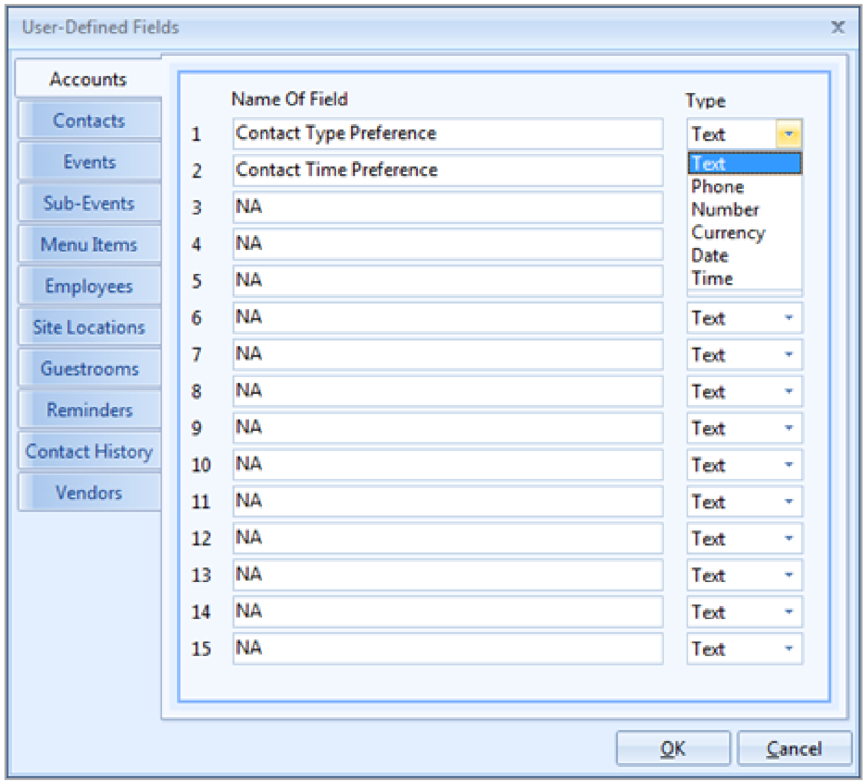
Creating User Defined Fields in Prospect Manager

You can create user-defined fields to serve any purpose you want. If you need to keep track of a special piece of information and Caterease did not provide you with this specific field, you can make up your own field. If you create a user-defined field for general text entry, you can also make up your own quickpick list to correspond with it. If you create a date field, you will have access to a drop-down calendar. Similarly, if you create a number field, you will have access to a drop-down calculator. User-defined fields can be brought onto your screen display and into your event prints, and can be tracked via reports and queries.

Creating a User Defined Field

1. From the **Setup** sidebar, select **User Defined Fields**.
   Result: *The User-Defined Fields window opens.*
2. Click the **Accounts** tab, if it is not already selected.
3. Click into any available field and type a name for your custom field.
4. Click the down arrow in the Type column, located to the right of your custom field.
5. Choose the appropriate Type for your new field: Text; Phone; Number; Currency; Date; or Time.

6. Repeat Steps 3 through 5 to add additional user-defined fields as desired.



7. Click **OK** when finished adding your user-defined fields.

Displaying User Defined Fields

1. Decide where in Prospect Manager you would like to place the field: on the **General** or **Miscellaneous** tab.

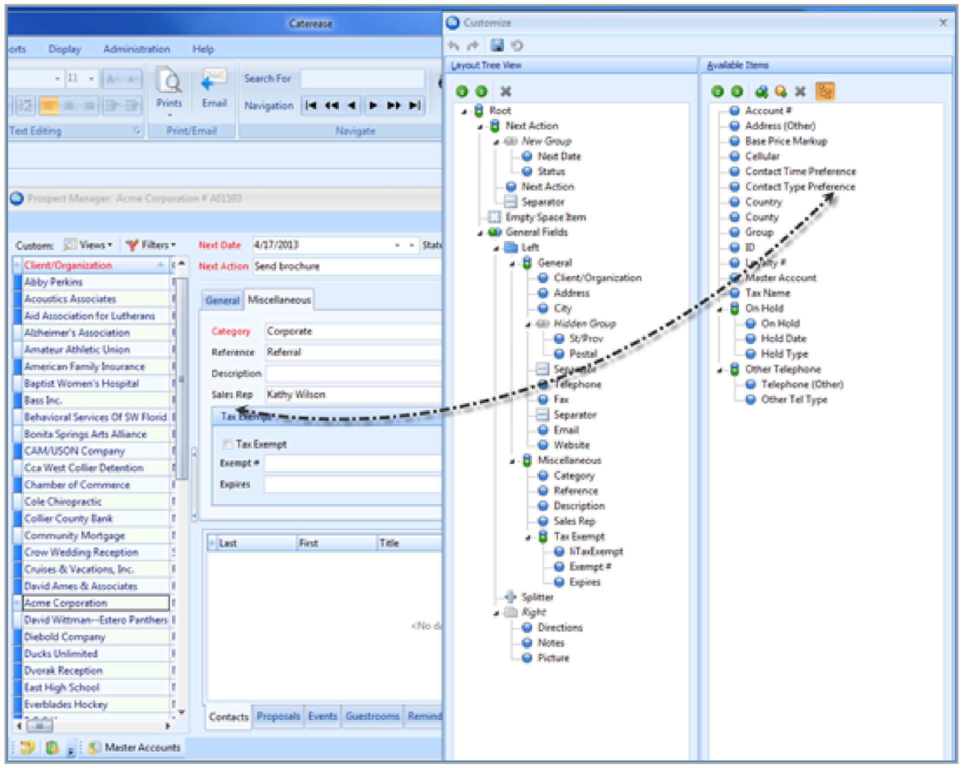
2. Right-click directly on the **General** or **Miscellaneous** tab name.

3. Select **Customize** from the pop-up window which displays.
   Result: The Customize window opens.

4. Hold your left mouse button down on the name of the user-defined field (found in the Available Items pane) you would like to display on your screen.

5. Drag the field name into position anywhere on the screen, and then release your mouse button.

   Note: *Remember to click the* ***Save Current Window Settings*** *button*  *if* *you would like to retain the new arrangement as your default setting.*



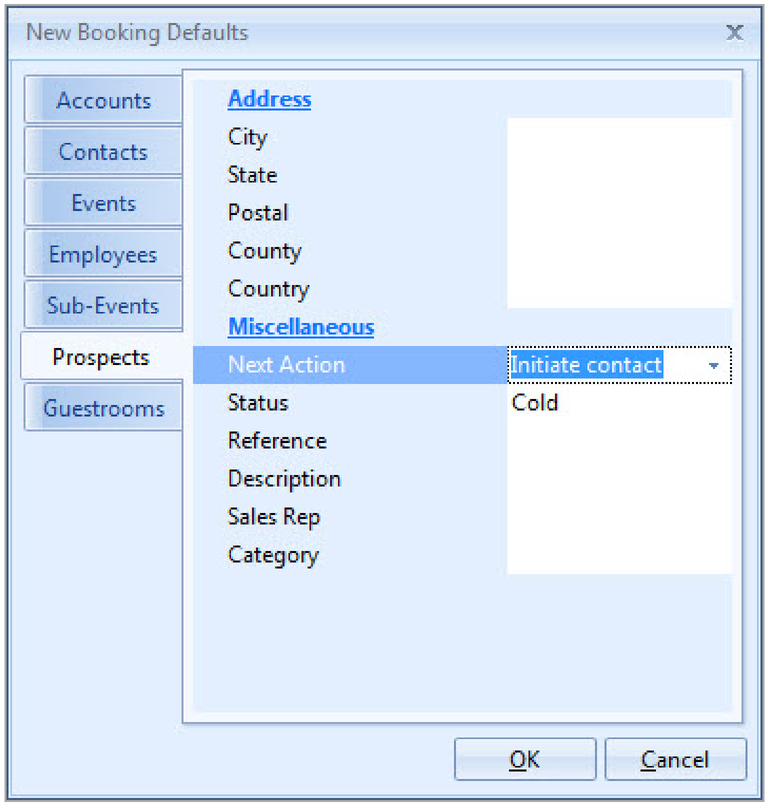
Establishing New Booking Defaults for Prospect Manager

The New Booking Defaults dialog box allows you to set certain default values for various fields in the program; therefore, whenever you add a new prospect to Caterease, its city, state, etc., will default to the values you enter here, within the New Booking Defaults window.

Adding New Booking Defaults

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click the **General** button and select **New Booking Defaults**.
   Result: *The New Booking Defaults window opens.*

3. Click the **Prospects** tab.



4. Click into the **Address** section and type into the fields as desired.

5. Click into the **Miscellaneous** section, click the down arrow at the right of a field and select the desired option from the quickpick list.

6. When finished, click **OK**.
Result: *The window closes, saving your changes.*

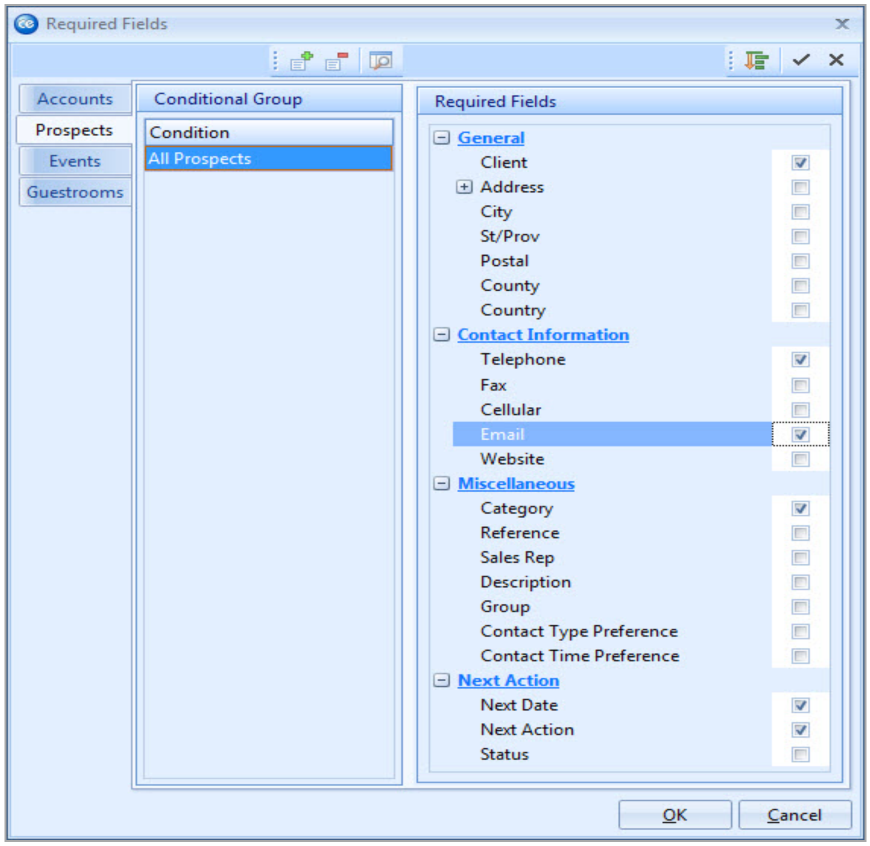
Establishing Required Fields for Prospect Manager

A perfect way to add structure to your sales staff's data-entry process is by using the Required Fields feature. This tool allows you to designate certain fields in Prospect Manager (and Account Manager, Event Manager, or Guestrooms Manager), as required. This means a prospect, account, event, or group rooms contract cannot be saved unless the required information fields are populated.

Making Fields Generally Required

__Tip__: Even user-defined fields you have created can be designated as required fields using this tool, and will be listed along with the other fields on the appropriate tabs. Also, note that you can optionally select all fields on the currently displayed tab as required information by clicking the __Check All Fields__ button at the top right of the window.

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **General > Required Fields**.
   Result: *The Required Fields window opens.*



3. Click the **Prospects** tab, located on the left-hand side of the window.
4. In the right-hand pane of the window, click the checkbox next to any field you want to be required information, optionally clicking the plus sign next to any unopened group of fields to choose fields from that group.
   Result: *The selected fields will now be required information, meaning that no prospects will be able to be saved without those details entered. (Existing records that are missing required information can be opened, but they cannot be edited and saved until all required information has been entered.)*
5. Click **OK** to close the window and save your changes.
   Result*: The next time you open Prospect Manager, any fields you designated as required will be highlighted in red on your screen. If your Prospect Manager was open when you established your required fields, you will need to close it and reopen it for the changes to take effect.*

Making Fields Conditionally Required

Tip: *The program evaluates these conditions in the order they are listed, and stops when it reaches a condition that is true. For example, if your first condition for accounts says "Category = Corporate" and your second condition says "Description = Association Member,"when the program finds an prospect with a category of "Corporate," it will apply those required fields and stop, never evaluating for the second condition. For this reason, it is imperative that any condition that says "All" records (Prospects, Accounts, Events, etc.), must be the LAST condition listed.*

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **General > Required Fields.**
   Result: *The Required Fields window opens.*
3. Click the **Prospects** tab, located on the left-hand side of the window.
4. Click the **Add Condition** button at the top center of the Required Fields window.
   Result: *The Select Condition window opens.*
5. Select a condition from the **Create a new group that applies to.**.. drop-down list.
6. Choose from among:
   - **All Prospects**
     Note: *If* ***All Prospects*** *is selected, the second drop-down will not display.*
   - **Prospects with a Category of or Prospects with a Description of**
     Note: *If either of these options is selected, the second drop-down list becomes available, along with its own drop-down list.*
7. When finished setting your conditions, click **OK**.
   Result: *The Select Condition window closes.*
8. In the right-hand pane of the window, click the checkbox next to any field you want to be required information for records that match your condition, optionally clicking the plus sign next to any unopened group of fields to choose fields from that group.
   Result: *The selected fields will only be required for records that match your condition (see tip for important information about prioritizing conditions).*
9. **Important**: Hold your left mouse button down on the new condition you've created in the left pane of the window and drag it up (or down) in the list to prioritize.
   Note: *See tip for important information.*
10. When finished, click **OK** to close the window and save your changes.

Unit 2: Completing Additional Prospect Information Tabs

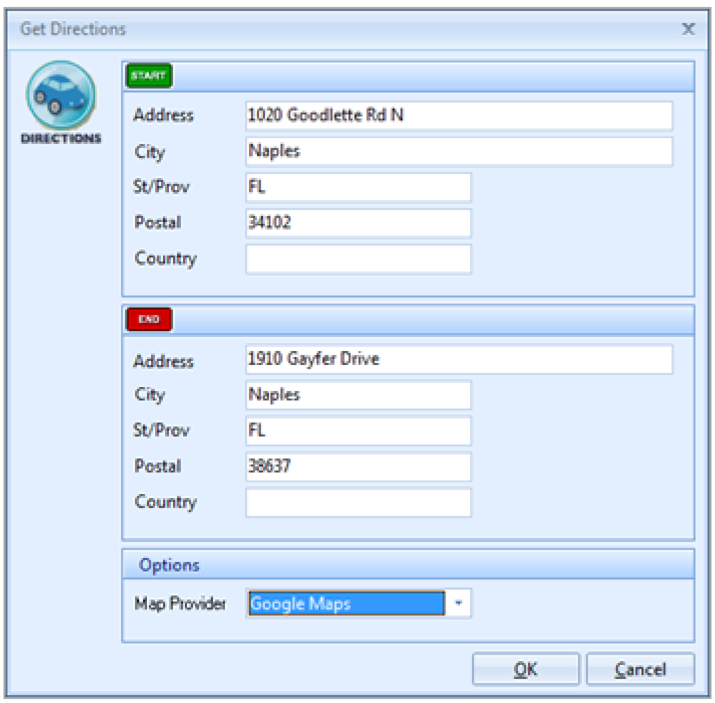
You can include directions to the currently selected prospect's facility by typing any text into the Directions tab and formatting the directions. You also have the option of copying directions from the Get Maps interface and pasting them into the Directions tab.

Objectives:

Upon completing this unit, you will be able to:

- *Use the Mapping Interface to copy and paste directions.*
- *Use the Scratch Pad to copy notes into the Notes tab.*
- *Insert an image into the Pictures tab.*

Using the Mapping Interface



1. Click the **Get Maps** button on the toolbar at the bottom right-hand side of the Prospect Manager screen.
   Result: *The Get Directions window opens, with your company's address automatically filled in as the* ***Start*** *information and your client's address as the* ***End*** *information.*
   Note: *If you have not filled in this prospect's address, city, state, etc., then*

*the **End** information will be blank.*

2. Click the down arrow next to **Map Provider**, located in the **Options** section, and choose your preferred mapping website.

3. Click **OK** to generate the directions.
   Result: *Your web browser will open on your chosen website, showing directions to the client's address.*
   Note: *This interface only works if you have a connection to the Internet currently active on your computer.*

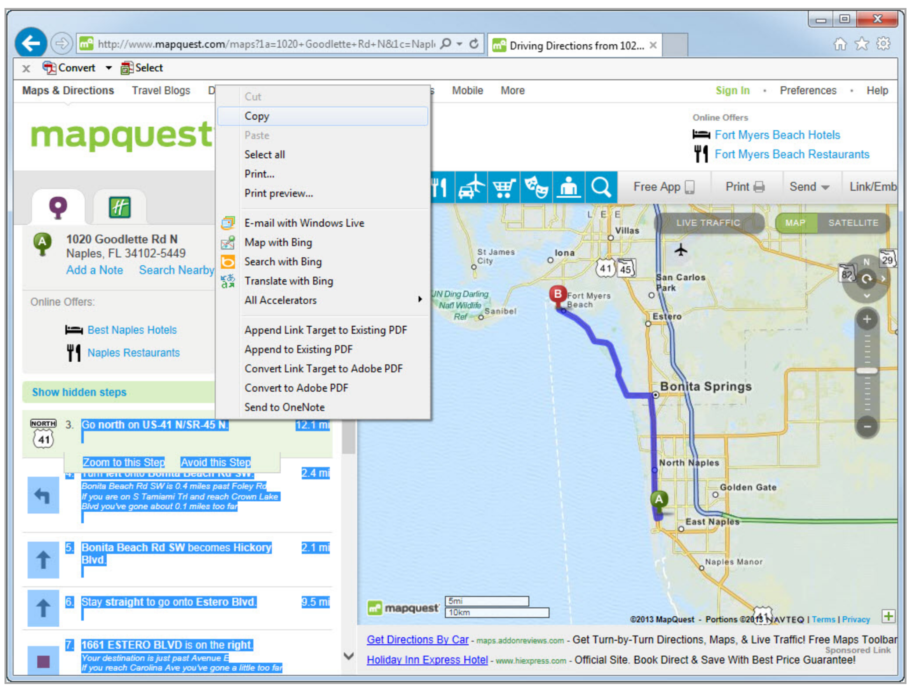
4. **Optional]** Copy the directions and paste them into the **Directions** tab, located on the upper right-hand side of the screen (see section below).

Copying the Directions and Pasting into the Directions Tab

1. Generate the directions as described above.

2. Highlight all of the directions (text).

3. Right-click into the Directions area and select **Copy**.



4. Return to the **Directions** tab in Prospect Manager.

5. Right-click into the Directions text block and select **Paste as Plain Text.**
   Note: *Choosing this option, as opposed to **Paste**, will help minimize the amount of text formatting that is required.*

6. Format the text (if necessary) by removing extra spaces.

Using the Prospect Manager Notes Tab

What if there is an important note or comment about a prospect that needs to be recorded for future reference? The Notes tab provides a place to store these important notes and comments. You can manually type the information or you can insert commonly used text that has been stored in your Scratch Pad.

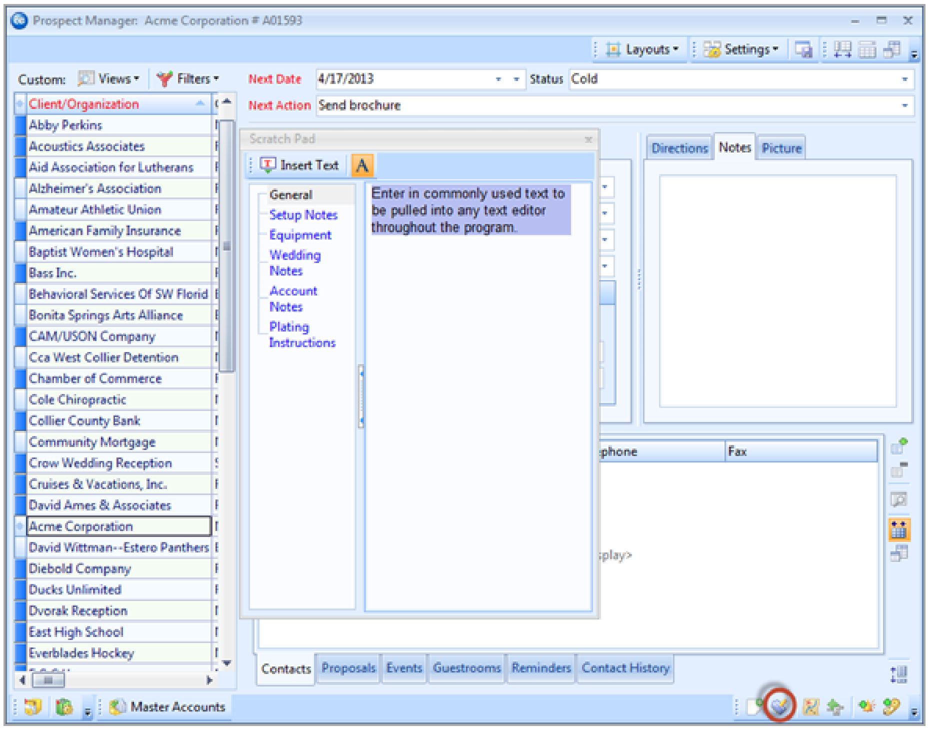
Using the Notes Tab

1. Click the **Notes** tab, located on the upper right-hand side of the Prospect Manager screen.
2. Click into the Notes text block.
3. Type the desired text or use the Scratch Pad, described below.
4. Format the text by using the **Format** toolbar at the top of your screen or by highlighting the text, right-clicking, and selecting **Font** in the pop-up window.

Copying Prospect Notes from the Scratch Pad

1. Click the **Notes** tab, located in the middle of the Prospect Manager screen.
2. Click into the Notes text block.
3. Click the **Scratch Pad** button , located at the bottom of the Prospect Manager screen.
   Result: *The Scratch Pad window opens.*
4. Select a category on the left-hand side of the window to locate your preferred text.
5. Highlight the text you want to copy (from the right-hand side of the window), then place your cursor into the text block and click the **Insert Text** button.

6. Format the text by highlighting it, right-clicking, and selecting **Font** or by using the **Format** toolbar at the top left-hand side of the screen, in the **Basic Text Editing** area.



Using the Prospect Manager Picture Tab

You can opt to include a digital image of the currently selected prospect, their building, or perhaps their company logo.

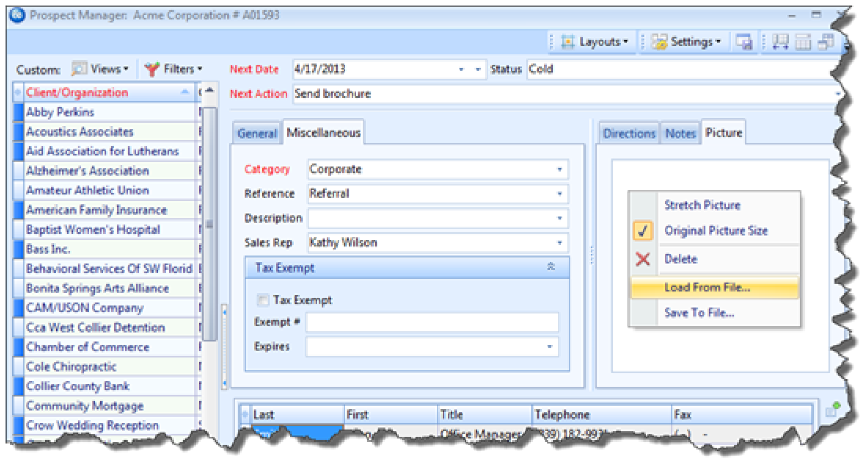
Inserting an Image

1. From the Prospect Manager main screen, click inside the Picture text block, located on the upper right-hand side of the screen.

2. Right-click and then select **Load From File** from the pop-up menu.
   Result: *A browse window opens.*

3. Browse to the image you want to insert.

4. Double-click the image to insert it into the text block.



Unit 3: Creating Next Actions and Action Dates

When you are prospecting your leads in Prospect Manager, you will want to schedule the next action you need to take for each of those leads. This Next Action field is a quickpick list you can customize in order to create a list of common actions and not have to type the same thing more than once. In addition, you can set up a filter in your Prospect Manager to instantly show you all prospects with a next action date of today (and, for that matter, your name as a sales rep), all with the click of a button!

Objectives:

Upon completing this unit, you will be able to:

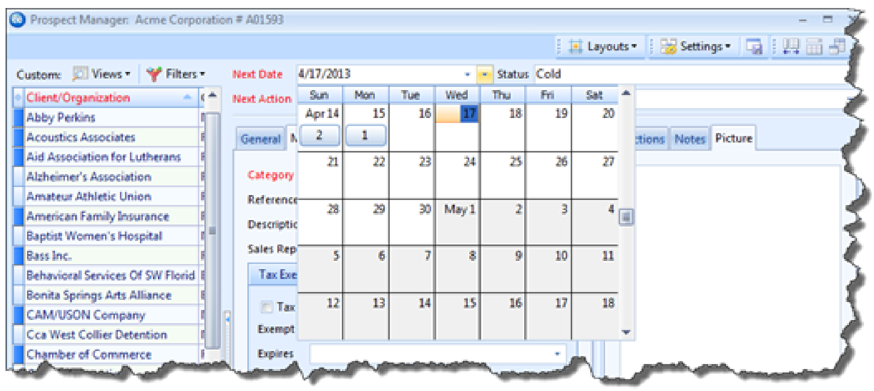
- *Create a next action for a prospect.*
- *Select an action date for the new action task.*
- *Designate a status for the prospect.*
- *Establish and retrieve a custom filter.*

Adding Next Actions and Next Action Dates

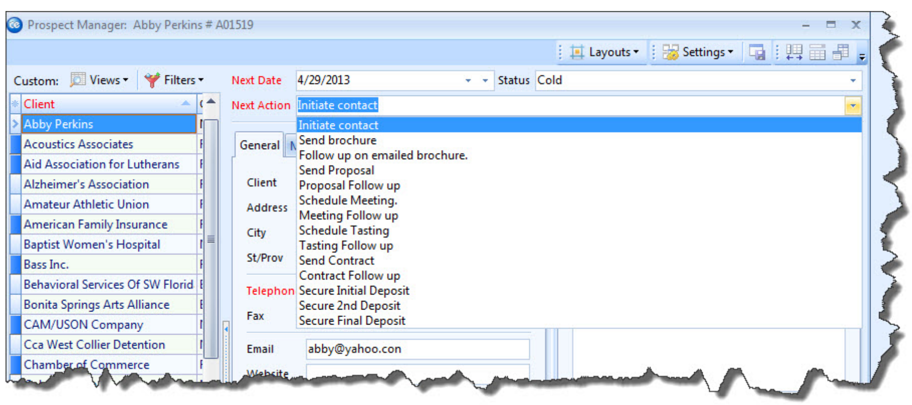
1. Locate the prospect record you would like to set a next action for, or add a new prospect.

2. Click into the <u>Next Date</u> field, located at the top of the screen, towards the middle.

3. Type a next-action date into the field, or click the down arrow to the right of the field to access a drop-down calendar.
   Note: *There are two calendars from which to choose: The first drop-down calendar (to the immediate right of the <u>Next Date</u> field) drops down the standard calendar view; the second drop-down calendar (displayed below) indicates the number of next actions that have been set for a particular date.*



4. Click the down arrow to the right of the <u>Next Action</u> field and select an option from the quickpick list.



Setting a Prospect Status

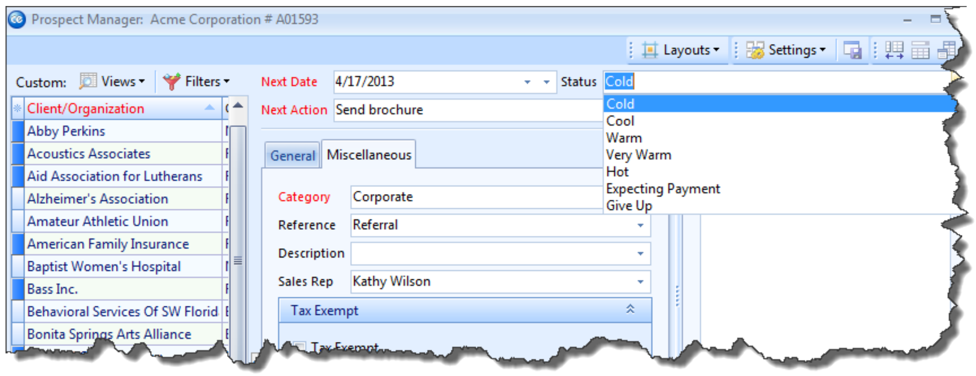
You can assign a status to a prospect, using a custom quickpick list of options, so you can track its progression from lead to account.

Assigning a Status to a Prospect

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Click the <u>Status</u> field, located towards the top right-hand side of the window.

3. Click the down arrow at the far right of the field to choose a status for the prospect from the customizable quickpick list.

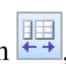


4. Click the **Save** button , located in the toolbar at the top of the screen.

Establishing a Filter in Prospect Manager

Perhaps at any time you might see more records in your Prospect Manager grid than you really want to look at. You can instantly (and temporarily) filter out certain records from your grid based on next actions, next action date, follow-up type, etc.

Establishing a Filter

1. From your Prospect Manager screen, click the **Display Full Grid** button , located at the upper right-hand side of the screen.
   Result: *Your Prospect Manager opens in full-grid mode.*

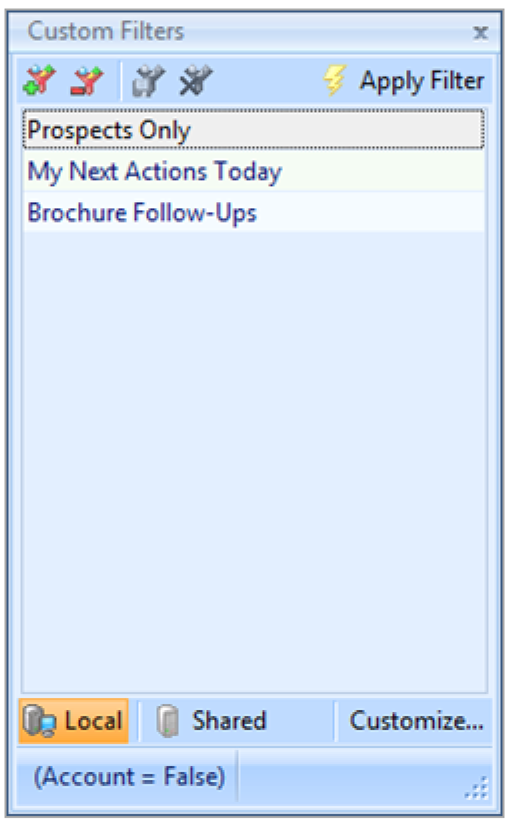
2. Click the **Quick Column Customizing** button , located to the left of the <u>Client/Organization</u> field.
   Result: *A drop-down list of column headings displays.*

3. Click the checkbox next to the desired field name, such as <u>Next Action</u> and/or <u>Next Date</u>.

4. Click the funnel at the right of a particular column heading--for example, the column heading labeled <u>Next Action</u>, and select a snap filter from the drop-down option (or create a custom filter).

Saving a Filter

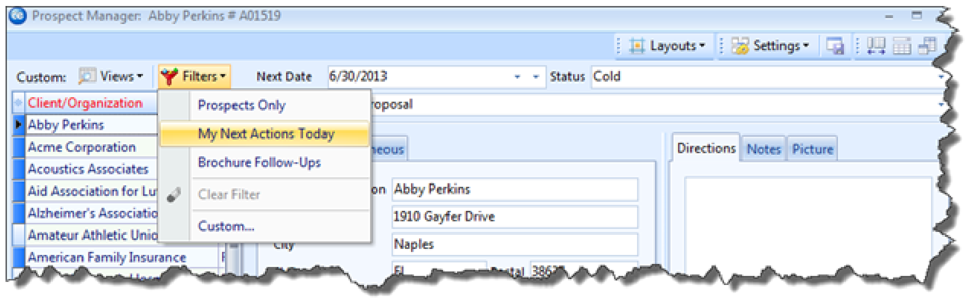
1. Establish a filter, as outlined above.
2. Click the **Filters** button, located at the top left-hand side of the Prospect Manager screen.
3. Click **Custom**.
   Result: *The Custom Filters window opens.*
4. **[Optional]** Click the **Shared** button at the bottom of the Custom Filters window if you want this custom filter to be shared with other users on your Caterease network.
   Note: *The **Local** button, selected by default, means this filter will only be available on your computer.*
5. Click the **Add Filter** button .
   Result: *A new filter is added to your list, with the default name "New Filter."*
6. Type a name for your new filter into the field.
7. Click the **Save Current Filter** button  .
   Result: *Your new filter is saved.*



Retrieving a Previously Saved Filter

1. Click the **Filters** button, located at the upper left-hand side of your main Prospect Manager screen.
   Result: *The list of custom filters you have created display in a drop-down list.*

2. Select the filter from the drop-down list.



Unit 4: Creating Reminders in Prospect Manager

Prospect Manager allows you to create a single next action and its action date and then filter your records so you can view all actions that are due that day. However, if you want to create reminders that will prompt you the moment you open Caterease, you can do so if you own the Contact Manager add-in to the program.

Objectives:

Upon completing this unit, you will be able to:

- *Add a new reminder in Prospect Manager.*
- *View or edit a reminder in Prospect Manager.*
- *Snooze, dismiss, or delete a reminder in Prospect Manager.*

Creating a New Reminder

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Click the **New Reminder** button, located on the bottom of the screen.
   Result: *The Reminder window opens.*

   Note: *You may also click the* ***Add a New Reminder*** *button from the* ***Reminders*** *tab.*

3. Complete the following information in the Reminder fields.

   - **Subject**: Type a Subject for this reminder, or click the down arrow to the right of the field to select items from a drop-down quickpick list.

   - **Location**: Type a Location to associate with this reminder, or select from the drop-down quickpick list.

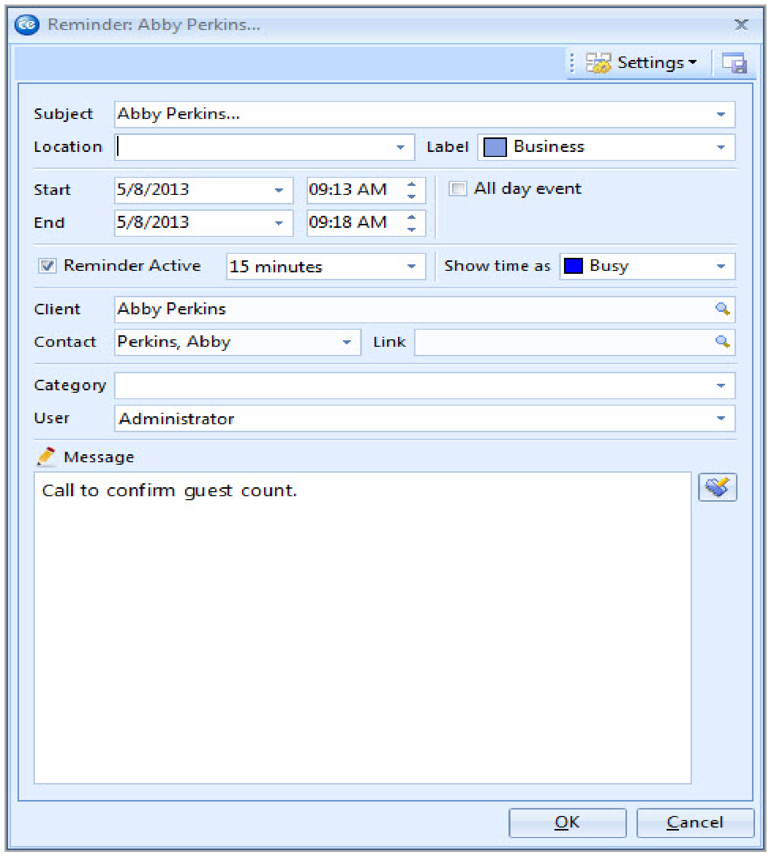
   - **Label**: Optionally assign a **Label** to the reminder by selecting an option from the quickpick list.

   - **Start Date**: In the first field to the right of **Start**, click the down arrow and select a start date from the drop-down calendar.
     Note: *The current date is entered by default.*

   - **Start Time/End Time**: **[Optional]** Enter start and end times by typing directly into the fields or using the up-and-down arrows to select the times.
     Note: *The current Start time is entered by default. This time will be displayed with the reminder, but will not control what time the reminder appears; in other words, a reminder might state you need to do*

something at 12:00 p.m., but it will appear when you first open Caterease that day.

- **End Date**: In the first field to the right of **End**, click the down arrow and select an end date from the drop-down calendar.
- **Reminder Active**: The check mark in the **Reminder Active** checkbox designates the reminder as active; removing the check mark makes the reminder inactive. The "Active" times may be adjusted by clicking the down arrow to the right of the field and choosing from the drop-down list.



4. Complete the following information in the Reminder Information fields.

- **Client**: This is the client/organization to which the reminder pertains. You can accept the default or click the magnifying glass to the right of the field to search for another client/organization.
- **Contact**: This is the contact person at the company to which this reminder pertains. You can accept the default or click the down arrow to the right of the field and choose another contact (or edit the existing one).

- **Link**: This button will link the reminder to the event you are currently on. You can click the magnifying glass to the right of the field to view the linked event information.
- **Category**: Type into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.
- **User**: This is the person to be reminded. Accept the default name or click the down arrow at the right of the field and choose from the quick-pick list.
  Note: *Select* ***Everyone*** *if you would like the reminder to be seen by all users.*

5. Click into the <u>Message</u> text block and type in the action this reminder is being used for.
   Note: *You may also access the Scratch Pad to insert pre-formatted text.*
6. When finished, click **OK**.
   Result: *The window closes and the reminder has been created.*

Managing Reminders in Account Manager, Prospect Manager, or Contact Manager

Reminders can be created, reviewed, edited or deleted in Account Manager, Prospect Manager, or Contact Manager using the steps described below.

Viewing Reminder Information

1. Click the **View Reminder Action Items** button, located on the right-hand side of the Manager screen, to highlight and activate the feature.
   Result: *The text of the Reminder Item will be displayed in a text block below the reminder* ***Date*** *and* ***Time*** *columns.*
2. **[Optional]** Click the **Save Current Window Settings** button to keep the **View Reminder Action Items** button activated as a default setting on the Manager screen.

Editing Reminders in the Manager

1. Find the prospect or account whose reminder you would like to edit.
2. Click the **Reminders** tab, located towards the bottom of the Manager screen.
3. Click any reminder in the grid to select it.

4. Click the **Show Reminder Details** button, located on the right-hand side of the screen.

5. Edit the reminder as desired.

6. When finished, click **OK**.
__Result:__ The Reminder window closes and your changes are saved.

Deleting a Reminder in a Manager

Tip: *Deleting a reminder is not the same as dismissing a reminder. If a reminder is dismissed, there is will still be a record of it in the reminder history. Conversely, if a reminder is deleted, the record will be removed from the reminder history.*

1. Find the prospect or account whose reminder you would like to delete.

2. Click the **Reminders** tab at the bottom of the Manager window.

3. Click on the reminder you would like to delete.

4. Click the **Delete Current Reminder** button, located at the lower right-hand side of the screen.
__Result:__ A confirmation prompt appears.

5. Click **Yes** to confirm your choice.
__Result:__ The reminder is removed from your Prospect Manager screen.
__Note:__ Inactive Reminders may be deleted in bulk in Contact Manager by clicking the __Select__ ribbon tab, clicking the __General__ button and selecting __Delete Inactive Reminders.__ You can also have Caterease automatically delete your reminders via the __Data__ tab in your __Global Settings__.

Using the Active Reminders Tool

The Active Reminders tool shows all reminders you currently need to address. The view you see is dependent upon whether you have told Caterease to show you all reminders or just those for a specific user, and also on how many days in advance and how many days back you have told the program to show your reminders.

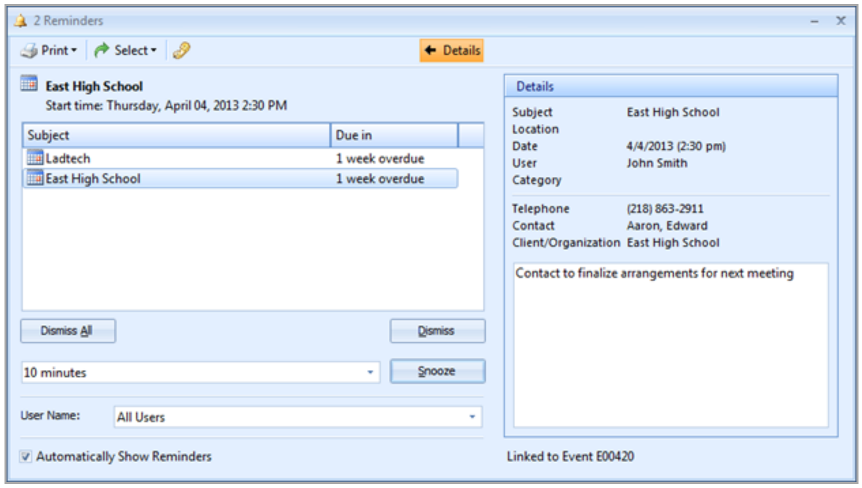
After the reminder has been dealt with, you can make the reminder inactive, thus making the reminder item disappear from the screen. You can also choose to create a contact history note (discussed in this unit), stating how the reminder was handled.

Viewing Active Reminders

1. Click the **Tools** sidebar item on the left-hand side of your screen.

2. Click the **Active Reminders** button.
__Result:__ The Reminders window opens.
__Note:__ If you are logged in as an Administrator, you can elect to see

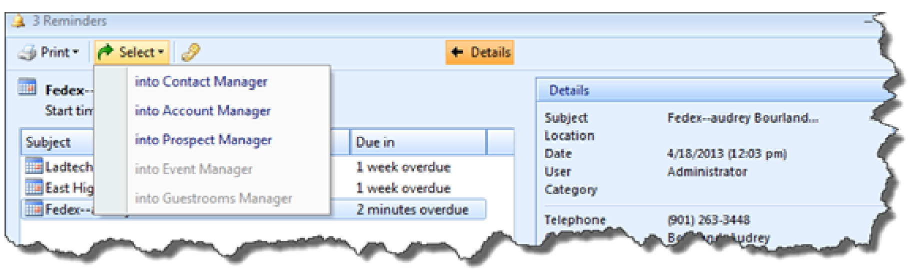
reminders for all users or for individual users by clicking the down arrow to the right of the User Name field.



3. Click any reminder on the Reminders form.
4. **[Optional]** Click the **Details** button, located on the upper right-hand side of the window, to view extended details about the reminder.

Retrieving Linked Reminder Items into a Manager

1. From the Reminders form, select the reminder you would like to work with.
2. Click the **Select** button at the top of the form.



3. Choose to select the reminder using the following guidelines:
   - **Into Contact Manager**: This option opens Contact Manager and positions you on the account associated with this reminder.
   - **Into Account Manager:** This option opens Account Manager on the account associated with this reminder.
   - **Into Prospect Manager:** This option opens Prospect Manager and positions you on the record associated with this reminder.

- **Into Event Manager**: This option opens Event Manager on the event that this reminder is linked to. If this option is not available when you click **Select**, this means that the highlighted (selected) reminder is not linked to an existing event.
- **Into Guestrooms Manager:** This option opens Guestrooms Manager on the account that this reminder is linked to. If this option is not available when you click **Select**, this means that the highlighted (selected) reminder is not linked to an existing guestrooms booking.

Dismissing or Snoozing Reminders

You can set reminders and then determine how long before an action the reminder message will appear. Then, when the reminder pops up, you can choose to snooze the reminder or dismiss the reminder. Snoozing a reminder closes the current reminder temporarily. After a period of time (that you designate), the reminder opens again. Dismissing a reminder closes the reminder and ends all future reminders for the selected item.

Snoozing a Reminder

1. From the Reminders form, select one or more reminders to snooze.
2. **[Optional]** Click the down arrow in the field to the left of the **Snooze** button, and select a length of time to snooze the reminder.
   Note: *The Reminder window will retain the snooze time you select.*
3. Click **Snooze**.

Dismissing a Reminder

1. From the Reminders form, select one or more reminders to dismiss.
2. Click **Dismiss**.
   Note: *To dismiss all items, click* ***Dismiss All****. If you would like to create a contact history note upon dismissal, click the* ***Create Contact History Item on Dismiss*** *button*  *prior to clicking* ***Dismiss****.*

Creating Contact History Items in Prospect Manager

You can use Contact History Notes in your Prospect Manager to keep track of conversations and tasks pertaining to your prospective customers. When you take a phone call, send an e-mail, etc., you can quickly log that occurrence in a Contact History Note, which will automatically be stamped with the current date and time. Once that prospective customer becomes an active account, all notes can be managed in Contact Manager and tracked via prints and reports.

Creating a New Contact History Note

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Search for and select the prospect for whom you would like to add a contact history note.

3. Click the **New Contact Item** button, located on the right-hand side of the screen.
   Result: *The Contact Item window opens.*

   Note: *You can also click the **Add a New Contact Item** button from the **Contact History** tab.*

4. Type a subject into the Subject field, or select a subject from the drop-down quickpick list.

5. Complete the Date field by clicking the down arrow to the right of the field to access the calendar tool.
   Note: *The current date is populated, by default.*

6. Complete the Time field by typing directly into the field or using the up-and-down arrows to adjust the time.
   Note: *The current time is populated, by default.*

7. Complete the following Contact History Information fields:

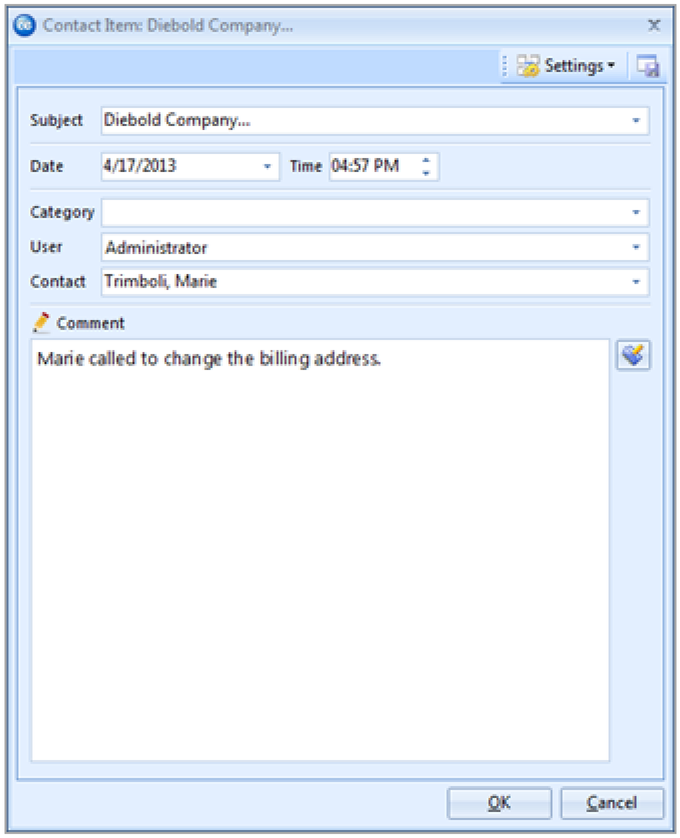
   - **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.

   - **User** -- This is the person who performed the task to which this contact history note refers. Accept the default name or click the down arrow at the right of the field and choose from the quickpick list.

   - **Contact** -- Click the down arrow to the right of the Contact field and select an existing contact or add a new contact.

8. Type the Contact History action into the Comment text block.
   Note: *You may also access the Scratch Pad to insert preformatted text.*

9. When finished, click **OK**.



Managing Contact History Notes in Prospect Manager

Viewing/Editing Contact History Notes in Prospect Manager

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** sidebar.

2. Find the prospect whose contact history note you would like to view/edit.

3. Click the **Contact History** tab, located towards the bottom of the Prospect Manager screen, if it is not already selected.

4. Click any contact history item in the grid to select it.

5. Click the **Show Contact Item Details** button , located on the right-hand side of the screen.
   Result: *The Contact Item window opens.*

6. Edit the contact history item as desired by typing into the Comment text block or by inserting previously formatted text from the Scratch Pad.

7. When finished, click **OK**.
   Result: *The Contact Item window closes and your changes are saved.*

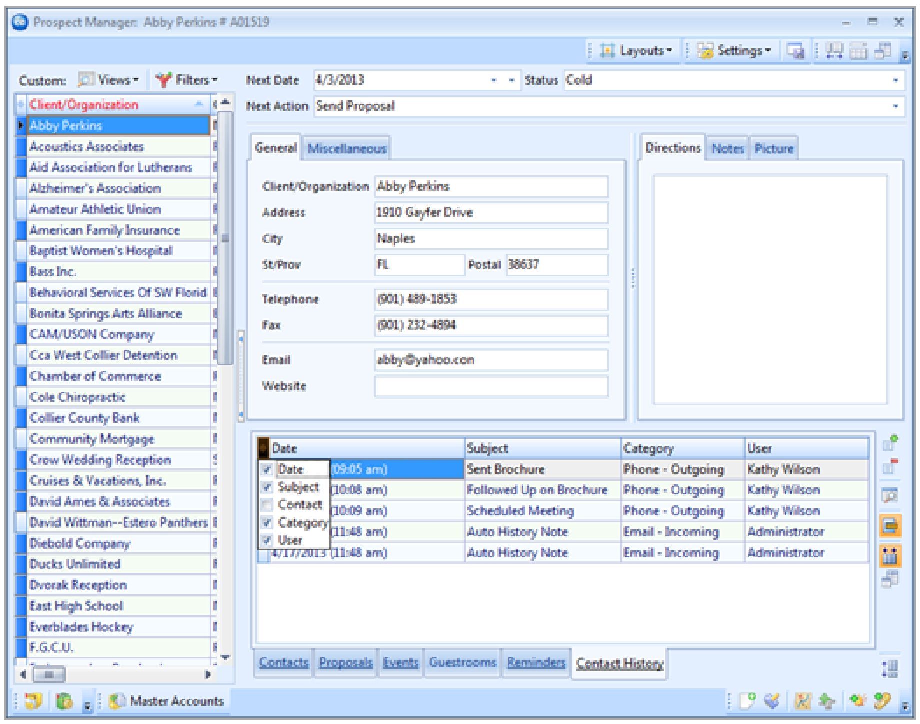
Customizing Columns in the Contact History Grid

1. Click the **Quick Column Customizing** button, located on the top left-hand side of the grid.

2. Click into a blank box to leave a check mark, which will display the field information in the **Contact History** tab details grid.

3. To close, click the **Quick Column Customizing** button again.

4. **[Optional]** Click the **Save Current Window Settings** button to save as the new Prospect Manager Contact History details grid.



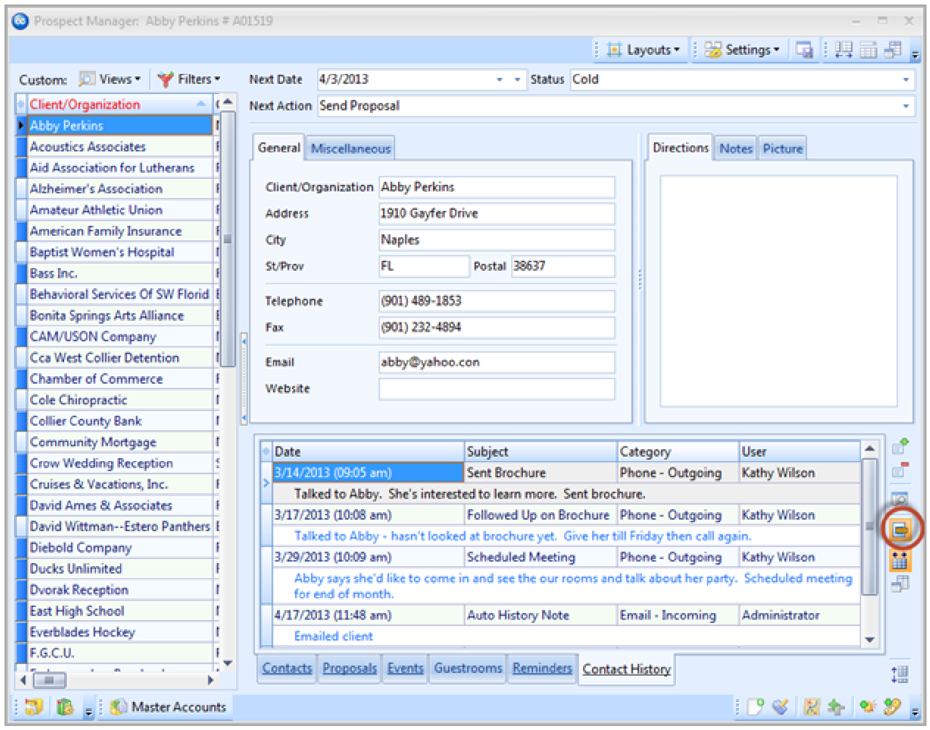
Showing the History Comment in the Contact History Grid

This button displays the text of Contact History items directly below their details on the **Contact History** tab.

1. Click the **Contact History** tab to access reminder information.

2. Click the **View Contact History Comment** button, located on the right-hand side of the Prospect Manager screen, to highlight and activate the feature.
   Result: *The actual reminder note will appear in blue text below its date and time details.*

3. **[Optional]** Click the **Save Current Window Settings** button to keep the **View Contact History Comment** button activated as a default setting on the Prospect Manager screen.



Unit 5: Creating a Prospect Proposal

You can create a detailed proposal in Prospect Manager without needing to make the prospect into an active client. Basic details, such as theme, date, times, price estimates, etc., can be included, and prints that include these details can be easily generated.

Objectives:

Upon completing this unit, you will be able to:

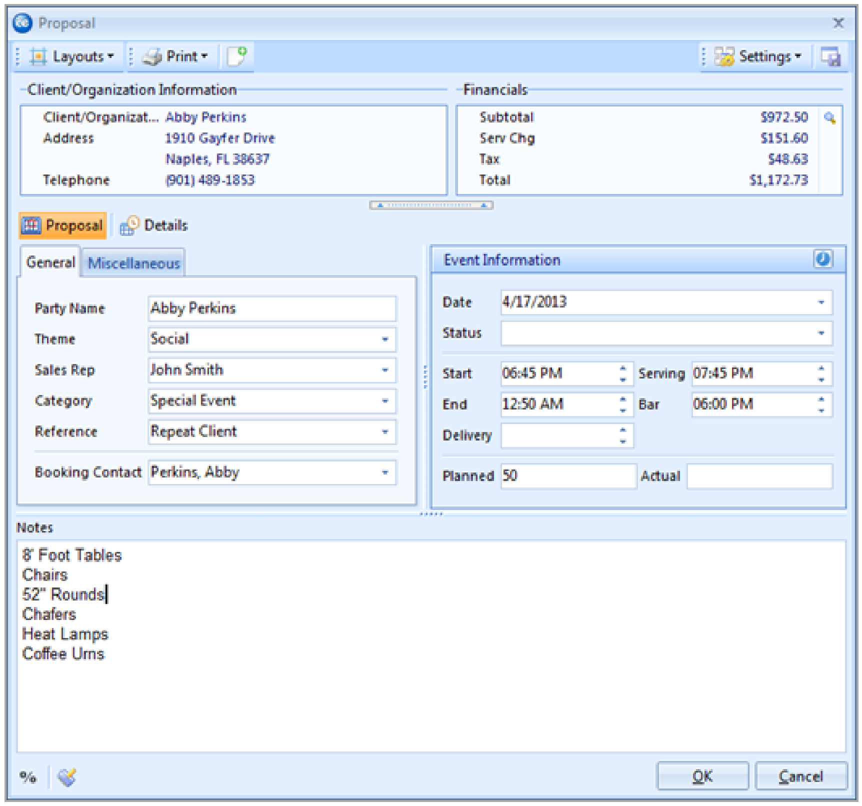
- *Create a proposal for a potential customer.*
- *Print and/or e-mail a proposal.*
- *Make a quick copy of an existing proposal.*
- *View and edit existing proposal details.*

Filling out the Proposals Tab

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Click the **Proposals** tab, located near the bottom of the screen.
3. Click the **Add a New Proposal** button, located on the right-hand side of the screen.
   Result: *The Proposal window opens, on the **General** tab.*
4. Type the party name into the Party Name field, and press **[Tab]** or **[Enter]**.
5. Type a theme into the Theme field or click the down arrow to the right of the field to select an option from the quickpick list.
6. Continue to fill out the General Proposal information as desired by making selections from the drop-down quickpicks.
7. In the **Event Information** section, select the proposed event date by clicking the down arrow to the right of the Date field to access the calendar tool.
8. **[Optional]** Select a Status from the drop-down list.
   Note: *Status options can be added through **Setup > Quickpicks > Prospect Manager > Proposal Status.***
9. Type the time into any Time fields, or click the **Time Wizard** button to graphically select the desired times.
10. Type the planned guest count into the Planned or Actual field.

11. Click the **Miscellaneous** tab, located to the right of the **General** tab, and make your selections from the drop-down quickpick lists.

12. **[Optional]** Click into the Notes text block and type any proposal notes, or use the Scratch Pad to insert preformatted text.



Filling out the Details Tab

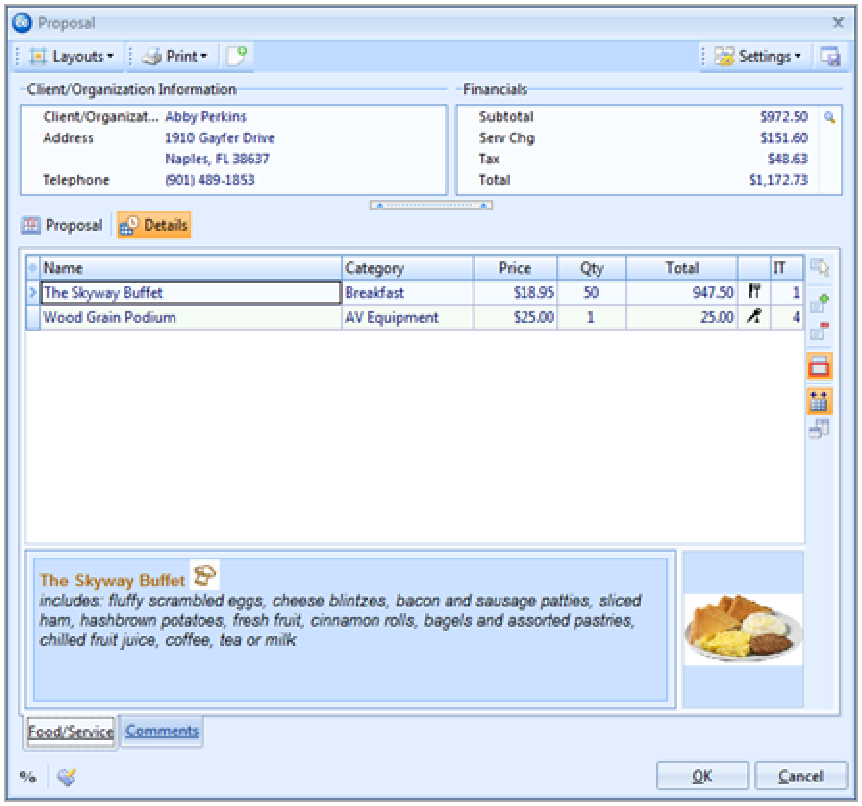
1. Click the **Details** tab, located to the right of the **Proposals** tab.
   Result: *The Proposal window opens, on the* ***Food/Service*** *tab.*

2. Click the **Display Menus** button , located on the right-hand side of the screen, and select food/service items.

3. **[Optional]** Click the **Add Menu Item** button  to add a new proposal item on-the-fly.

4. **[Optional]** Click the **Comments** tab, located at the bottom of the window, and enter proposal comments into the text block or retrieve pre-formatted text from the Scratch Pad.

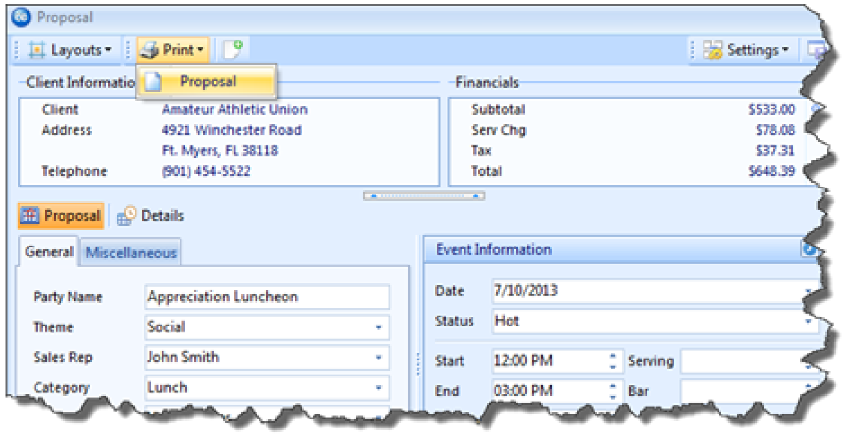
5. When finished, click **OK**.



Printing a Prospect Proposal

1. From the Proposal window in Prospect Manager, click the **Print** button at the top left-hand side of your screen.
2. Select **Proposal**.
   Result: *A Print Preview screen displays.*

Note: *You may be prompted to save your changes.*



3. From the available options at the top of the screen, you may elect to print the document or e-mail the document, as described in previous sections of this guide.

4. **[Optional]** Click the **Setup** button on the Print Preview screen to change the selected printer or the number of pages or copies.
   Result: *The Printer Setup window opens, allowing you to change various printer option.*
   Note*: If you perform this step, you must click* ***OK*** *before moving to Step 5, below.*

5. Click the **Print** button from the Print Preview screen.

Modifying a Proposal Print

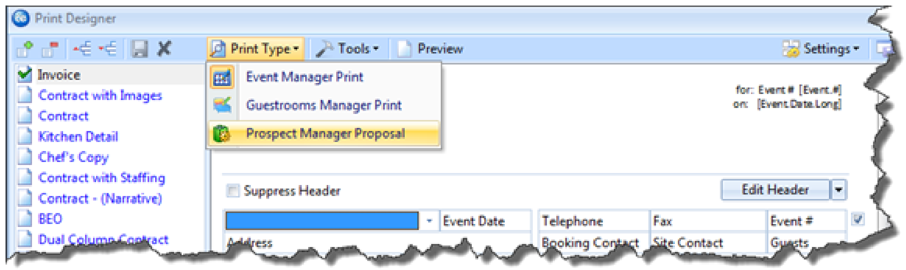
1. Click the **Setup** sidebar on the left-hand side your screen.
   Note: *Do not close out of Prospect Manager; you must have an active window open in Prospect Manager.*

2. Click **Print Designer**.
   Result: *The Print Designer window opens.*

3. Click the **Print Type** button at the top of the window.

4. Choose **Prospect Manager Proposal**.
   Result: *The list of titles in the left-hand pane of the window updates to show*

all current prints of this type.



5. Select the desired Proposal from the left-hand pane.

6. Edit the print as desired.
   Note: *Refer to the "Creating Custom Event Prints" manual for detailed information about how to customize your prints.*

Sending E-mails from Prospect Manager

One click opens a familiar e-mail window, allowing you to instantly send an e-mail message directly from Prospect Manager. You even have the option of sending a batch of e-mails to multiple prospects, if you wish.

Sending an E-mail from Prospect Manager

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Use the Search tools to find the contact to whom you would like to send an e-mail.

3. Click the **Email** button, located at the top of the screen.
   Result: *The Email window opens.*
   Note: *The **Email** button is also available from any Print Preview screen, and will automatically attach whatever print you are previewing (Confirmation, Invoice, etc.), to the outgoing e-mail.*

4. In the To... field, type any additional e-mail recipients (the primary contact displays as a default) or click the **To**... button to access additional e-mail addresses.

5. **[Optional]** In the Cc field, type the e-mail address of the carbon-copy recipient here (separate multiple recipient addresses by semicolons).

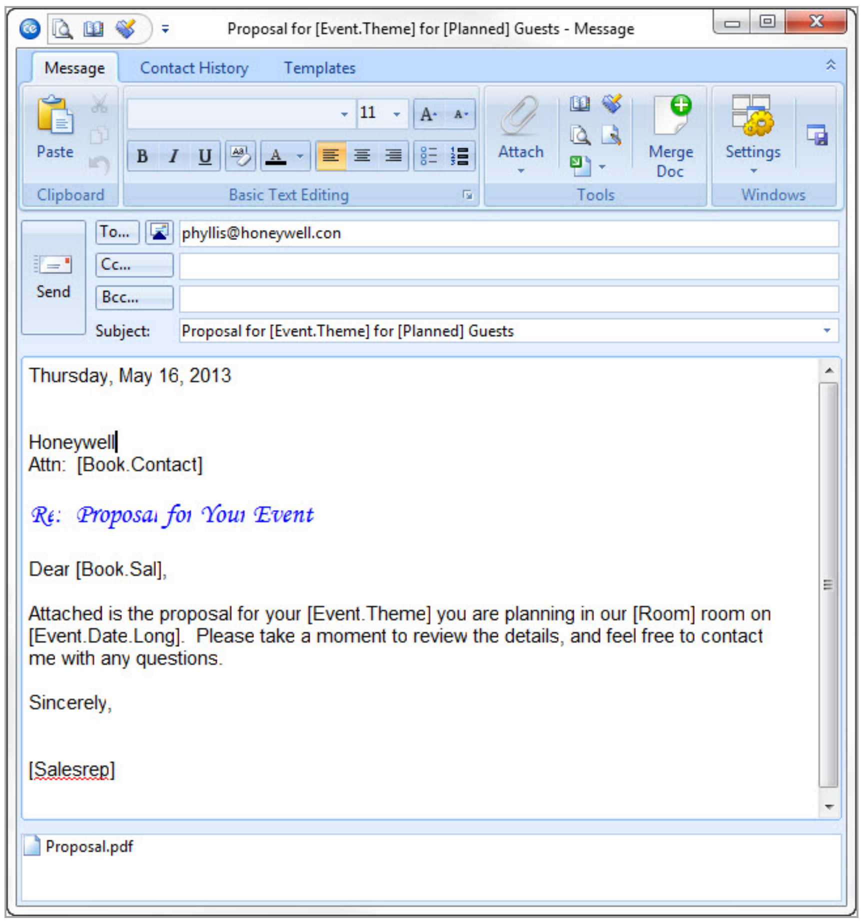
6. **[Optional]** In the Bcc field, type the e-mail address of the blind-carbon-copy recipient here (separate multiple recipient addresses by semicolons).

7. In the Subject field, type a subject for your e-mail or click the down arrow to the right of the field to access a custom quickpick list.

8. Click into the large white text block in the window and type a message as the body of your e-mail.
   Note: *If you own the Marketing Tools add-in, you can use one of your custom merge letters as the body of the e-mail. These letters will automatically merge in information from the current contact, including name, salutation, current date, etc.*

9. **[Optional]** Format the text using the **Format** toolbar at the top of your e-mail window.

10. **[Optional]** Attach any desired prints or files.



Sending Batch E-mails

The ability to batch e-mail allows you to e-mail multiple prospects at one time. This is a huge time-saving tool! If you have the Professional version of Caterease, you can select as many prospects as you want in your Prospect Manager, and then send them all an e-mail, with one single mouse click. You can even use a merge letter as the body of that e-mail (if you own the Caterease Marketing Tools add-in), so each recipient gets a message that looks like it was typed just for them - and your fingers don't even have to touch the keyboard!

Sending Batch E-mails from Prospect Manager

1. From the Prospect Manager main screen, hold your **[Ctrl]** key down and click individual multiple prospects in the grid along the left-hand side of the screen to select them, or select multiple continuous accounts by clicking on a prospective or active account, holding your **[Shift]** key down, and then clicking the next account in either direction.
   Note: *Holding your **[Ctrl]** key and the **[A]** key down at the same time will select all prospective and active accounts in the grid.*

2. Click the **E-mail** button at the top of the Prospect Manager screen.
   Result: *The e-mail address for this outgoing e-mail will default to the Client e-mail associated with each selected prospect.*

3. In the Subject… field, type a subject for your e-mail, or click the down arrow to the right of the field to access a custom quickpick list.

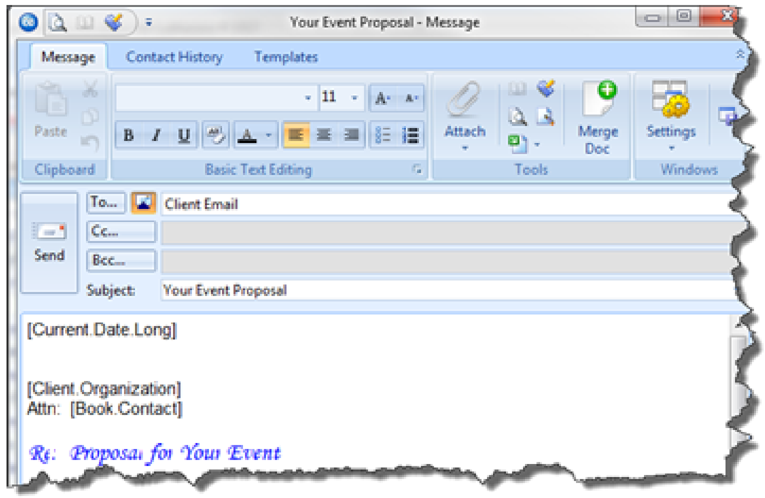
4. Click into the large white text block in the window and type a message as the body of your e-mail.

5. **[Optional]** Click the **Merge Doc** button to select one of your custom merge letters as the body of your e-mail, and then click **Select.** *(Available only if you own the Marketing Tools add-in.)*

6. **[Optional]** Format the text of your e-mail using the **Format** toolbar on your e-mail window.

7. **[Optional]** Click the **Attach** button at the top of the e-mail window attach a file or print, as described previously.

8. When finished, click **Send**.
   Result: *The e-mail is sent to each recipient, with his/her unique attachment.*



Copying a Proposal

If a prospect or active account would like a proposal that consists of almost the same event details as a previous proposal, you can make a quick copy of the proposal, then make any necessary changes to the new copy.

Copying a Prospect Proposal

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

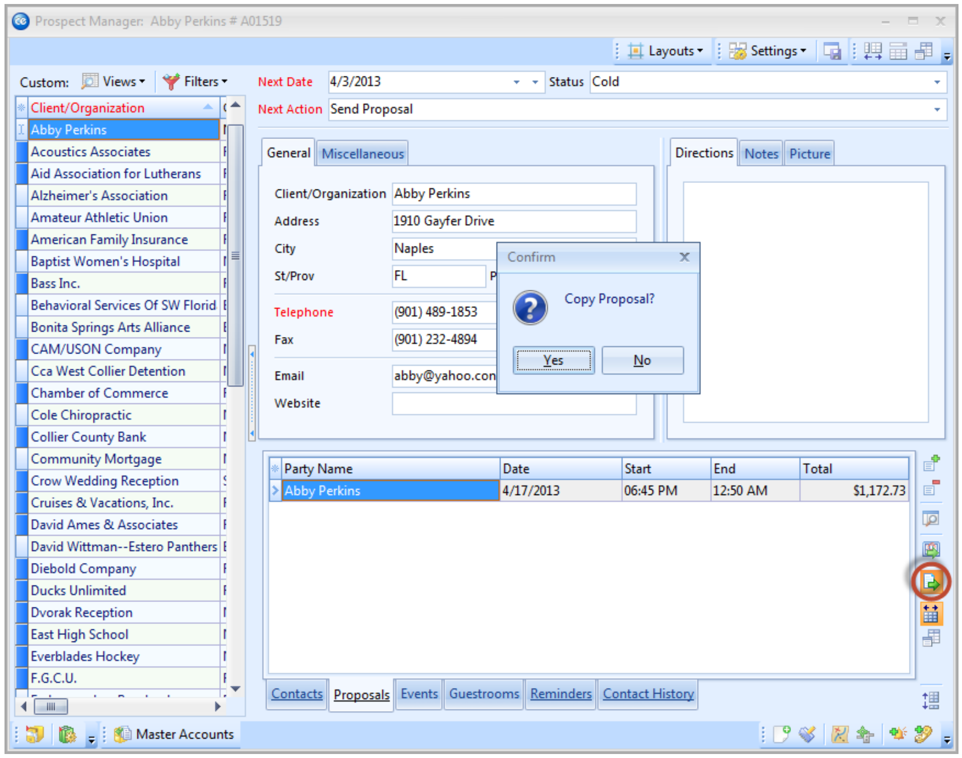
2. Click the **Proposals** tab, located near the bottom of the screen.

3. Click on the proposal you would like to copy, from the grid.

4. Click the **Copy Proposal** button , located on the right-hand side of the screen.
   Result: *A confirmation prompt appears.*

5. Click **Yes** to confirm.
   Result: *A copy of the proposal displays.*

6. Fill in the proposal details as desired, selecting or adding proposal items.



Creating an Event from a Proposal

You can create an event directly from a proposal, with the click of a button.

Creating an Event from a Proposal

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Click the **Proposals** tab, located near the bottom of the screen.

3. Select the proposal that you would like to make into an event by clicking on it in the grid.

4. Click the **Create Event From Proposal** button , located on the right-hand side of the screen.
   Result: *A confirmation prompt appears.*

5. Click **Yes** to confirm.
   Result: *You are placed on Step 2 of the Event Wizard.*

6. Fill in the event details as desired.

7. When finished, click **OK**.

Adding Events from Prospect Manager

When you add a new event for a lead in Prospect Manager, as shown below, the program automatically converts that lead into an active account.

Adding Events from Prospect Manager

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** sidebar.

2. Find the prospect for whom you would like to add a new event, or add a new one.

3. Click the **Events** tab, located towards the bottom of the Prospect Manager screen.

4. Click the **Add a New Event** button , located on the right-hand side of the screen.
   Result: *A confirmation prompt appears.*

5. Click **Yes** to confirm.
   Result: *You are taken to Event Manager, where you are placed on a brand-new event for the customer you selected in Step 2, above.*

Viewing and Editing Event Information

1. From Prospect Manager, use the Search tools to retrieve the prospect whose scheduled event you wish to view/change.

2. Click the **Events** tab.

3. Select the desired event (if more than one) and then click the **Select** button, located on the right-hand side of the screen, to retrieve the event into Event Manager.
   Result: *A confirmation prompt appears.*

4. Click **Yes** to confirm your choice.
   Note: *You can also retrieve an event by double-clicking an event in the Events details grid and clicking **Yes** to retrieve the event into Event Manager.*

5. View or edit the event information.

6. Click the **Save** button to save your changes.

Using the Events Tab Grid

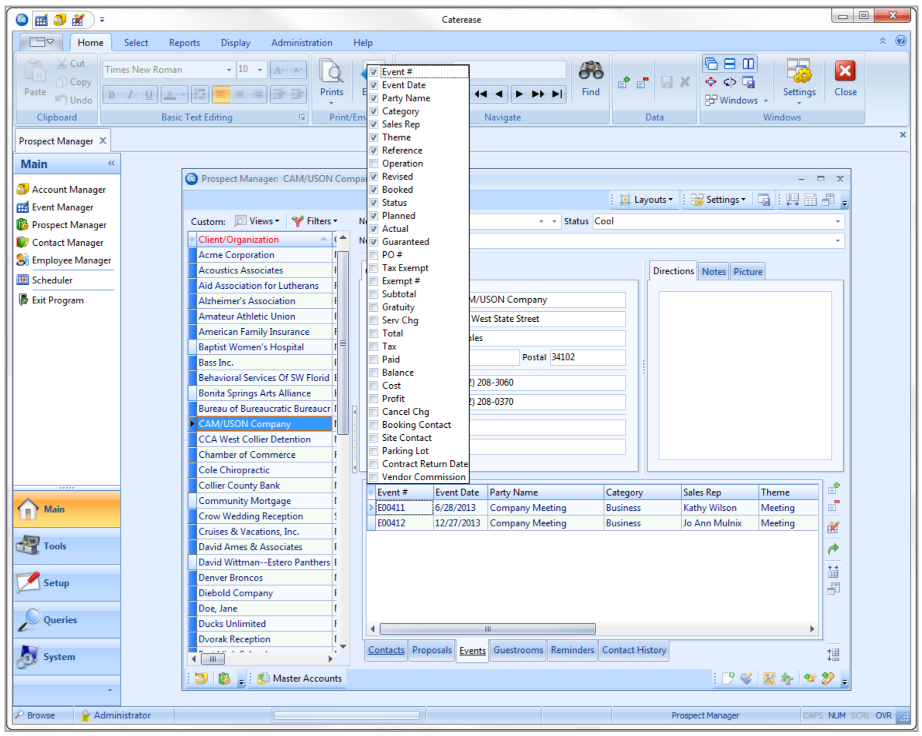
1. From Prospect Manager, click the **Events** tab.

2. Click the **Quick Column Customizing** button, located to the left of the Event # column.

3. Click into a blank box to place a check mark, which will display the respective field in the **Events** tab details grid.

4. To close, click the **Quick Column Customizing** button again.

5. **[Optional]** Click the **Save Current Window Settings** button to save as the new Prospect Manager Events Details grid.



Unit 6: Storing Off-Premise Site Information

If you do off-premise parties, you can link a prospective client to their preferred site location, so whenever anyone books an event for that client, the location is automatically retrieved, by default.

Objectives:

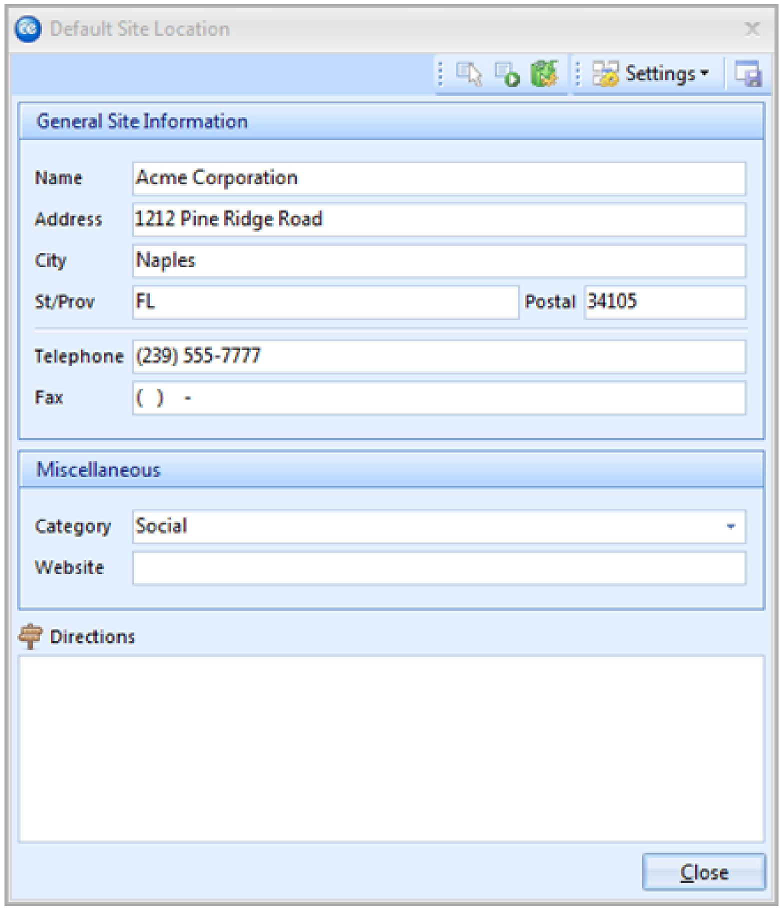
Upon completing this unit, you will be able to:

- *Set the default off-premise site location for a prospect.*
- *Assign the prospect address as the default site location.*

Creating a Default Site Location

1. In Prospect Manager, use the Search tools to retrieve the prospect you wish to create the default site location for.
2. Click the **Default Site Location** button, located at the bottom of the screen, to open the Default Site Location window.
3. Type into the General Site Information fields, and press **[Enter**] or **[Tab]** to move from one field to another.
4. Type into the Category field or click the down arrow to the right of the field to choose from the corresponding quickpick list.
5. **[Optional]** Type the website information into the Website field.
   Note: *Enabling the* ***Direct Hyperlink*** *setting in the* ***Preferences*** *setup will allow you to click on the address in this field and link immediately to that website.*
6. **[Optional]** Type (or paste) directions into the Directions text block.

7. **[Optional]** Click the **Add to Site Location Database** button  to add your new address to the site location database.

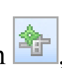


Assigning the Prospect Address as the Default Site Location

If your company provides a delivery service or caters events at a client's home or other address, you can set the prospective client’s address as the default site location. The benefit: When a prospect does become an active account, every time you add an event for that new customer, the client address will automatically default as the site address for the address.

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** sidebar.

2. Use the Search tools to retrieve the prospect for whom you would like to create the default site location.

3. Click the **Default Site Location** button , located at towards the bottom of the screen.
   Result: *The Default Site Location window opens.*

4. Click the **Copy From Client** button , located at the top of the window.
   Result: *A confirmation prompt appears.*

5. Click **Yes** to confirm.
   Result: *The prospect's address is now the default site location.*

6. Click **Close**.
   Result: *The window closes, saving your changes.*

Unit 7: Changing Account Status

In Prospect Manager, you can quickly change the "status" of a lead from "Prospect" to "Account" or vice versa, so that the lead will appear in Account Manager and can be used to book an event. If you convert a proposal for a lead into an actual event, the program will automatically convert that prospective lead into an active account.

Objectives:

Upon completing this unit you will be able to:

- *Change a prospective account to an active account and change an active account to a prospective account.*
- *Assign a Master Account to a Prospect.*

Changing from a Prospective Account to an Active Account

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Use the Search tools to retrieve the prospect whose status you would like to change.
   Note: *Both prospective accounts and active accounts display in the grid. They are differentiated by separate color schemes which vary, depending on your Skin selection.*
3. Click on a prospect from within the grid.
4. Click the **Change to Account** button, located at the bottom left-hand side of the screen.
   Result: *A confirmation prompt appears.*
   Note: *You may also right-click from the record within the grid: Click* ***Change Account Status*** *and select* ***Change to Account.***
5. Click **Yes** to confirm.
   Result: *The prospective account becomes an active account.*
   Note: *Once a prospect has been changed to an account, it will be visible in Account Manager and Event Manager. Your Prospect Manager (and Contact Manager, if you own it) list both prospects and accounts, and can be color-coded to distinguish between the two.*

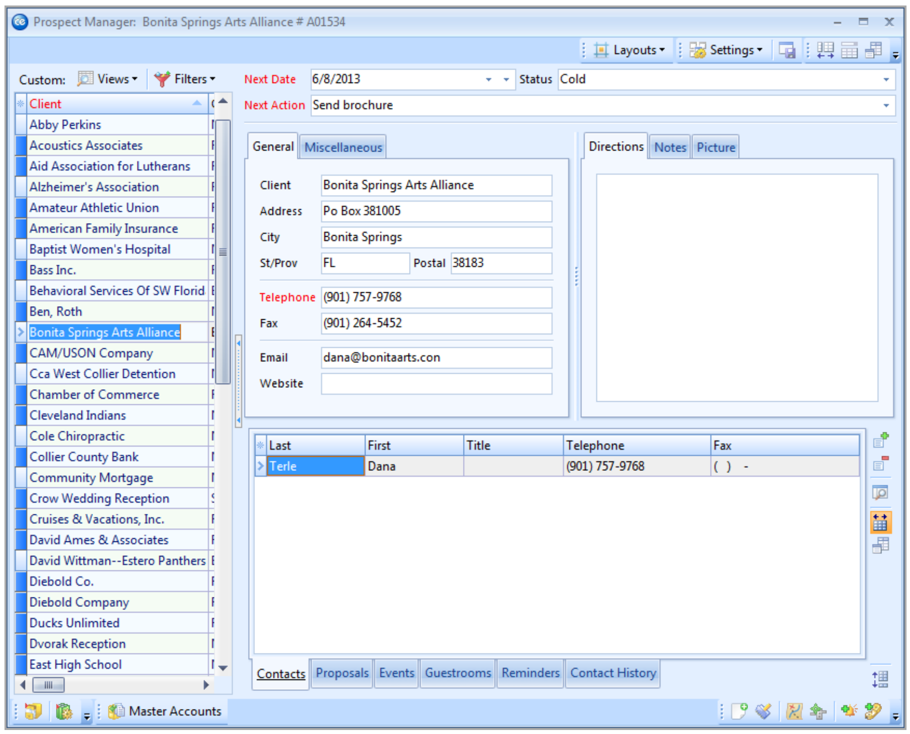
Changing from an Active Account to a Prospective Account

Tip: Depending on your Skin selection, active accounts and prospective accounts are separated out according to their color. In this example, prospective accounts are in light blue; active accounts are in dark blue.

1. From Prospect Manager, use the Search tools to retrieve the prospect whose status you wish to change.

2. Click the **Change to Prospect** button , located at the bottom left-hand side of the screen.
   Result: *A confirmation prompt appears.*
   Note: *You may also right-click from the record within the grid. Next, select* ***Change Account Status*** *and then choose* ***Change to Prospect****. However, if active bookings exist for an account, you will not be permitted to make the account a prospective account.*

3. Click **Yes** to confirm your choice.
   Result: *The active account becomes a prospective account.*



Assigning a Master Account to a Prospect

Tip: Click the ***View Booked Events*** *button or the* ***View Client Contacts*** *button to view all events or contact people for the clients associated with that Master Account.*

1. From Prospect Manager click the **Master Accounts** button, located on the bottom left-hand side of the screen.
   Result: *The Master Accounts window opens.*
   Note: *As a default, the program will normally filter all records displayed in Prospect Manager to show only those belonging to the currently highlighted Master Account. If this is the case, and no Master Account yet exists, no*

records will be displayed in Prospect Manager.

2. Click the **Set Filter** button  at the top of the Master Accounts window to disable the filter option.
   Result: *The filter is disabled and all records are displayed in the Prospect Manager screen.*
   Note: *This button acts as a toggle; clicking it again will filter out all prospects in Prospect Manager except those belonging to the currently highlighted Master Account.*

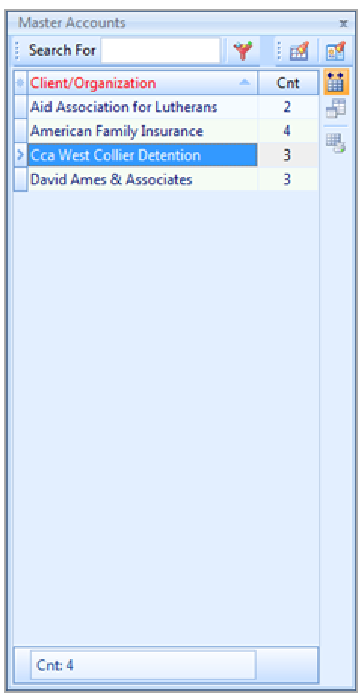
3. Find the prospect which you want to assign to as Master Account (or one that you want to turn into a Master Account).

4. Hole your left mouse button down on that prospect record in the grid along the left-hand side of the Prospect Manager screen.

5. Drag that prospect into the Master Accounts window and drop it in one of two places:

   - in a blank area of the window, to turn that prospect into a Master Account

   - on top of the name of a particular Master Account, to assign the prospect to that Master Account.



Unit 8: Importing a List of Prospects

The dynamic import tool in Prospect Manager allows you to import complete customer information: name, address, phone number, contact name, etc., plus a host of user-defined fields, in three easy steps. A powerful list of options is available to give you the ultimate control of the data that gets retrieved. While these clients are imported directly in Prospect Manager as fresh leads, they can be easily promoted to active accounts, with just a click of the mouse.

Objectives:

Upon completing this unit, you will be able to:

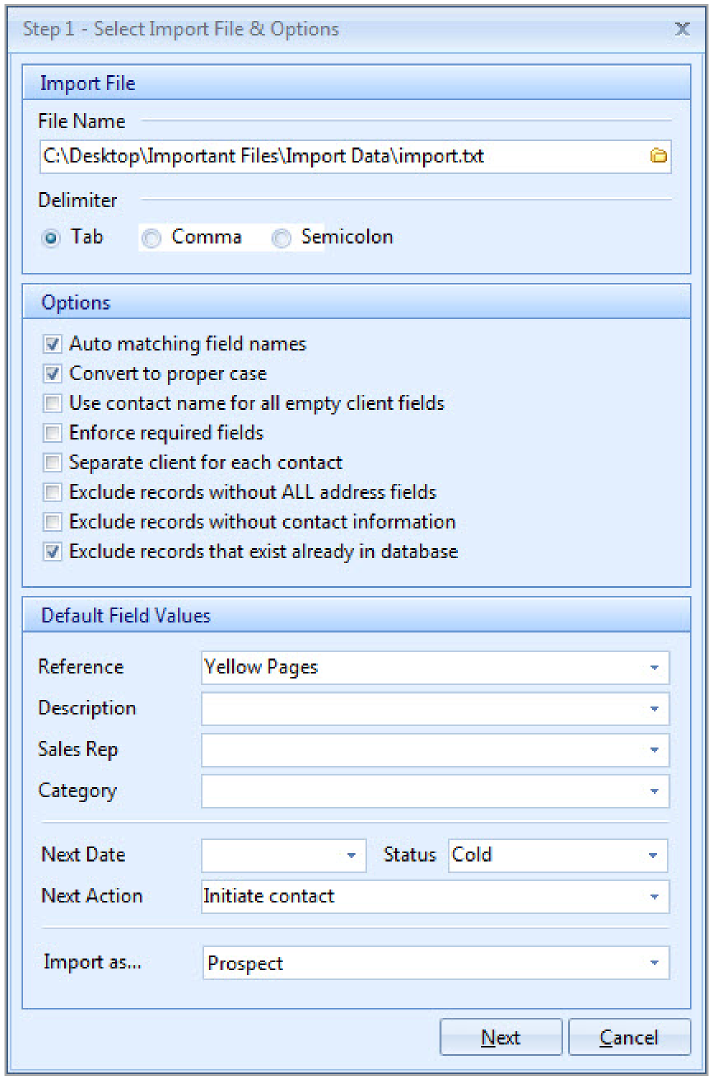
- *Import a database of prospects into Caterease.*
- *Save a database of prospects.*

Step 1: Select Import Files and Options

1. From the **Select** ribbon tab in Prospect Manager, click the **General** button and select **Import Data Wizard**.
   Result: *The Select Import File & Options window opens.*
2. Click the folder button to the right of the File Name field.
3. Select the file containing the data you want to import and click **Open.**
4. Choose the appropriate delimiter for that file (Tab, Comma, or Semicolon).
   Note: *A delimiter is what separates information in the file you are sorting. Information can be separated by tabs, by commas, or by semi-colons. If you don't know the appropriate delimiter, review the import file or consult a technical advisor.*
5. Select the desired options for this import from the following list:
   - **Auto matching field names**
     This option will match fields in your imported data with their corresponding fields in Caterease. For example, if you have a field called "Client" or "Customer" in your import file, this option will cause that field to be selected as the Client name in Caterease, by default. Any matches automatically made can be easily changed by you in Step 2 of the import process.
   - **Convert to Proper Case**
     This option will convert all of your data to proper casing, with capital letters as the first letter of each word and lowercase letters following. (Obviously, this option will ignore state abbreviations.)

- **Use contact name for all empty client fields**
  This option will use the name of the contact person as the client name, if no client name already exists. This will be automatically arranged as "Last Name First Name" or "First Name Last Name," depending on your Global Settings (**Managers** tab).
- **Enforce Required Fields**
  This option will only allow records to be imported if they have information in all of the fields you have deemed "required" in the Prospect Manager area of your Required Fields tool.
- **Separate client for each contact**
  This option will create a separate client for every contact person in your import file. Selecting this option will likely create some duplicate clients.
- **Exclude records without ALL address fields**
  This option will not allow any records to be imported if they do not have every address field entered.
- **Exclude records without contact information**
  This option will not allow any records to be imported if they do not have contact people's names listed.
- **Exclude records already in database**
  This option will not allow any records that already exist in Prospect Manager to be imported.

6. **[Optional]** Select default values for the Caterease fields of Reference, Description, Sales Rep, Category, Next Date, Status, and Next Action. ***Note:*** *The values you choose here will default for all records when you import them into Prospect Manager*.

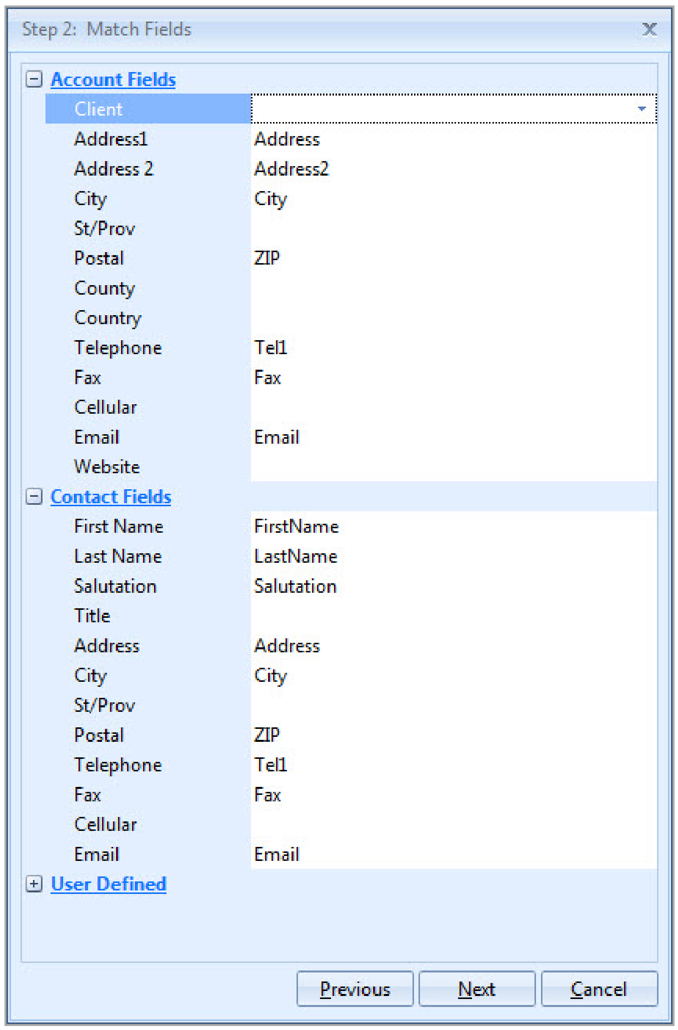

Step 1 - Select Import File & Options
Import File
File Name
C:\Desktop\Important Files\Import Data\import.txt
Delimiter
Tab
Comma
Semicolon
Options
Auto matching field names
Convert to proper case
Use contact name for all empty client fields
Enforce required fields
Separate client for each contact
Exclude records without ALL address fields
Exclude records without contact information
Exclude records that exist already in database
Default Field Values
Reference
Yellow Pages
Description
Sales Rep
Category
Next Date
Status
Cold
Next Action
Initiate contact
Import as...
Prospect
Next
Cancel

Step 2: Match Fields

1. Verify selections for each field.
   Note: *The field names on the left are the names in the Caterease Prospect Manager, whereas those on the right are the specific data that will be imported from your import file into these fields. If you chose the option Auto Matching Field Names in Step 1, above, the import tool has tried to select certain fields automatically for you.*

2. **[Optional]** Click the down arrow next to any field to select a match from your import file.
   Note*: You can click the plus sign to the left of Contact Fields or User Defined Fields to see fields in those categories.*

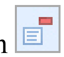
3. Click **Next** to move on to Step 3.



Step 3: Confirm Primary Import Data

1. Review data to be imported.
   Note*: You can click the small plus sign to the left of any client name to see the list of contact people associated with that client. You can also sort by any column in the grid by clicking that column heading.*

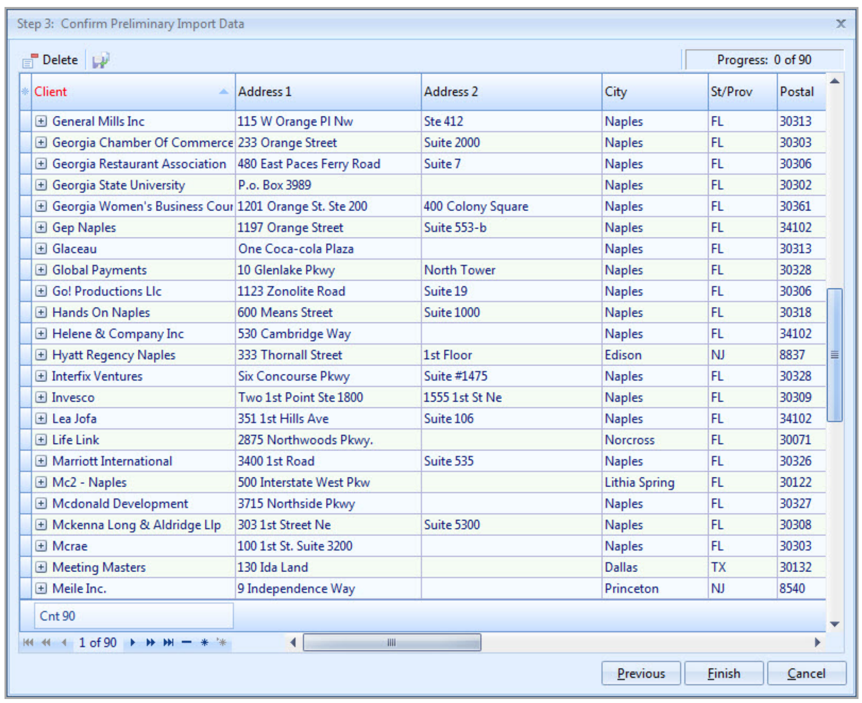
2. **[Optional]** Click in any field on the grid and edit as desired prior to importing into Caterease.

3. **[Optional]** To remove records from the import list, select one or several records on the grid and click the **Delete Record** button  at the top left of the screen.
   Note*: Hold down your* ***[Ctrl]*** *or* ***[Shift]*** *key to select multiple records.*

4. **[Optional]** If you need to abort the import process, you can save this grid data as is by clicking the **Save Modified Data** button  at the top of the screen, and then continue from here at another time.

5. Click **Finish** to import these records into Caterease.

6. Click **Yes** to confirm and complete the import.



Client	Address 1	Address 2	City	St/Prov	Postal
General Mills Inc	115 W Orange Pl Nw	Ste 412	Naples	FL	30313
Georgia Chamber Of Commerce	233 Orange Street	Suite 2000	Naples	FL	30303
Georgia Restaurant Association	480 East Paces Ferry Road	Suite 7	Naples	FL	30306
Georgia State University	P.o. Box 3989		Naples	FL	30302
Georgia Women's Business Cou	1201 Orange St. Ste 200	400 Colony Square	Naples	FL	30361
Gep Naples	1197 Orange Street	Suite 553-b	Naples	FL	34102
Glaceau	One Coca-cola Plaza		Naples	FL	30313
Global Payments	10 Glenlake Pkwy	North Tower	Naples	FL	30328
Go! Productions Llc	1123 Zonolite Road	Suite 19	Naples	FL	30306
Hands On Naples	600 Means Street	Suite 1000	Naples	FL	30318
Helene & Company Inc	530 Cambridge Way		Naples	FL	34102
Hyatt Regency Naples	333 Thornall Street	1st Floor	Edison	NJ	8837
Interfix Ventures	Six Concourse Pkwy	Suite #1475	Naples	FL	30328
Invesco	Two 1st Point Ste 1800	1555 1st St Ne	Naples	FL	30309
Lea Jofa	351 1st Hills Ave	Suite 106	Naples	FL	34102
Life Link	2875 Northwoods Pkwy.		Norcross	FL	30071
Marriott International	3400 1st Road	Suite 535	Naples	FL	30326
Mc2 - Naples	500 Interstate West Pkw		Lithia Spring	FL	30122
Mcdonald Development	3715 Northside Pkwy		Naples	FL	30327
Mckenna Long & Aldridge Llp	303 1st Street Ne	Suite 5300	Naples	FL	30308
Mcrae	100 1st St. Suite 3200		Naples	FL	30303
Meeting Masters	130 Ida Land		Dallas	TX	30132
Meile Inc.	9 Independence Way		Princeton	NJ	8540

Unit 9: Searching For Prospects

You can search for prospects based on virtually any detail. A special tool lets you incrementally search as you type the client's name, while the Prospect Finder tool lets you use basically any detail or combination of details to locate the customer you need.

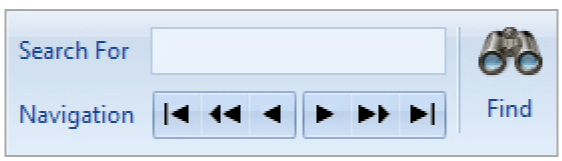
Objectives:

Upon completing this unit, you will be able to:

- *Search for prospects incrementally, by name.*
- *Use the Full Grid to search by various details.*
- *Use the Prospect Finder tool to locate records.*

Searching Incrementally by Prospect Name

1. Click in the Search For field in the **Home** ribbon tab at the top of Prospect Manager screen.



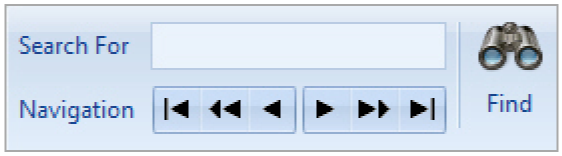
2. Begin typing the name of the customer you want to find.
   Result: *You are scrolled to a match as you type.*
   Note: *You will be searching based on client name, since that is how prospects are sorted by default. See topic below for details on how to sort and search by other details.*

Sorting and Searching Incrementally by Other Details

1. Click the **Display Full Grid** button at the top right of the Prospect Manager window.
   Result: *The Prospect Manager switches from showing ONE client in a "form" mode to showing MANY clients listed in a grid.*
   Note: *This button acts as a toggle; you will be clicking it again to switch back to "form" mode in Step 4, below.*

2. Click any column heading along the top of the grid to sort the list by that detail (for example, "Telephone").
   Note: *Sorting may not be available on all fields.*

3. Click in the Search For field in the **Home** ribbon tab at the top of Caterease screen and begin typing.
   Result: *You are scrolled to a match in the grid as you type.*
   Note: *You will be scrolling based on how you have sorted the list of accounts in Step 2, above. When searching by phone or fax numbers, no dashes, parentheses or spaces are necessary; only type the actual numbers themselves.*



4. Once you have found the record you want, click the **Display Full Grid** button  again to switch the manager display back to "form" mode.
   Result: *Your Prospect Manager will display the new client you have found.*

Using the Prospect Finder Tool

1. Click the **Find** button (binoculars) on the **Home** ribbon tab at the top of your Prospect Manager screen.
   Result: *The Prospect Finder tool displays. In the* ***Search By Fields*** *area, type the text you would like to search for.*
   Note*: You may search by more than one field. Many fields, such as Category, Reference, Description, etc., have a corresponding drop-down lists to the right of the field.*

2. In the Search Rules field, select the appropriate rule.
   Note: *Confirm that "Ignore Case" is selected if you do not want to worry about capitalization.*

   - **Starts With** - The field you chose in the **Search By Fields** area starts with the words or letter you typed.
   - **Exact Match** - The field you chose in the **Search By Fields** area contains exactly the words you typed and nothing else.
   - **Anywhere in Field** - The words or letters you typed appear anywhere in the field you chose in the **Search By Fields** area.
   - **Sounds Like** - The words or letters you typed match phonetically to the words in the field you chose in the **Search By Fields** area.

3. **[Optional]** Click the radio button next to And or Or, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.

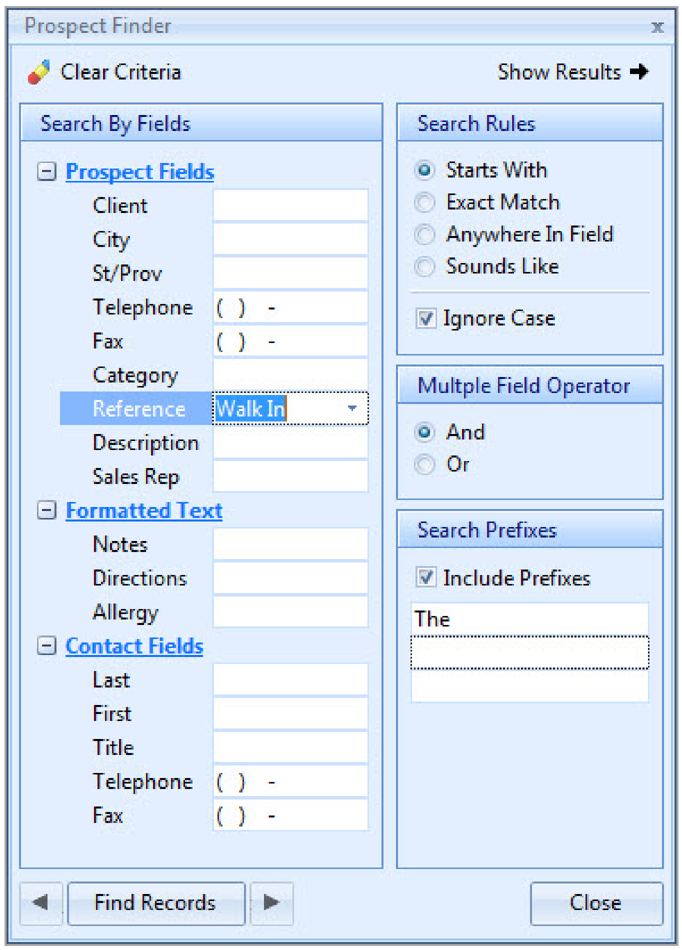
4. **[Optional]** Click the **Include Prefixes** checkbox and then type the prefix (a, an, the) into the fields within the **Search Prefixes** section to include prefixes in your search.

5. Click the **Find Records** button, located at the bottom of the window.

6. **[Optional]** Click the **Show Results/Hide Results** button , at the top right of the Finder, to display a list of all records your search has found thus far.
__Note:__ Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Prospect Finder tool down.

7. **[Optional]** If you accidentally skip over the record you want, click the arrows on either side of the **Find Records** button to move forward or backward.

8. Once your record is located, click **Close**.
__Result:__ The Finder window closes and you are on the record you sought.
__Note:__ Click the __Clear Criteria__ button after you have run a search, to clear all results and begin again.



Unit 10: Querying Your Prospective Customers

Caterease offers many query tools to help you instantly find any data you need. You can generate a multitude of prints based on your results, and you can even generate batch e-mails, attaching your prints and using a dynamic merge letter as the body of your outgoing message. Discover, below, how you can query your database of prospective leads to maximize your marketing strategy.

Objectives:

Upon completing this unit, you will be able to:

- *Add conditions to perform a custom query.*
- *Customize the query.*
- *Save a custom query for future use.*
- *Print the detail grid as a custom report.*

Running a Custom Query of Your Prospects

1. Click the **Queries** button on the **Main** sidebar.

2. Click the **Prospects Query** button.
   Result: *The Prospects Query window opens.*

3. Click on the **click here to add a new condition** button
   

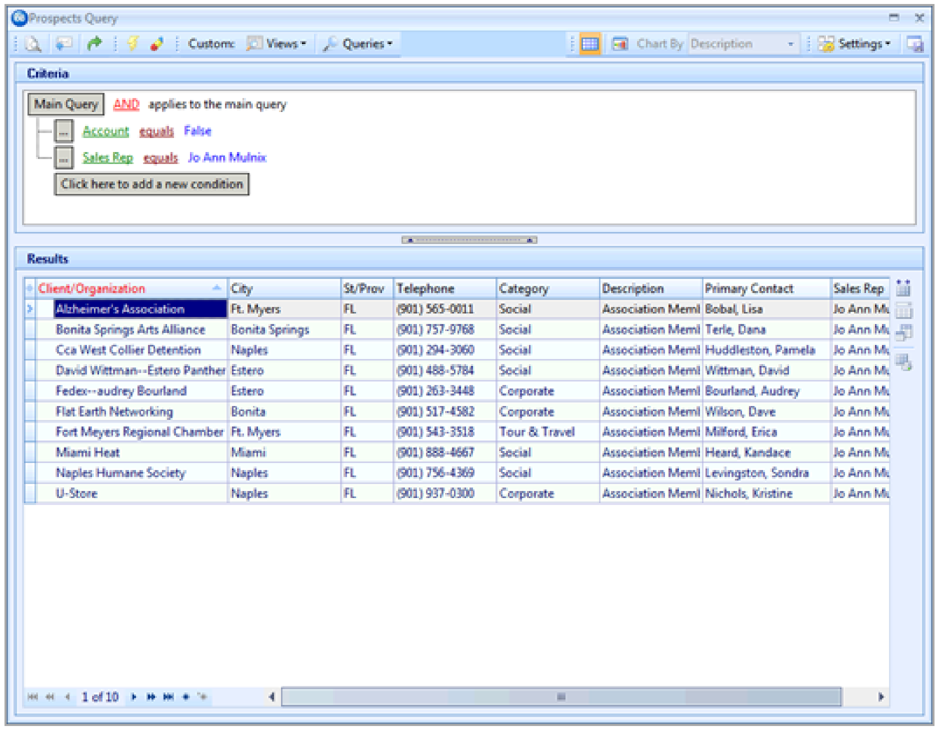
   .
   Result: *A query condition is added, stating "Account equals <empty>."*

4. Click the final word in the condition, <empty>, and choose **True** or **False**.
   Note: *If Account equals True, your query will return account-related results only; if Account equals False, your query will return prospect-related results only.*

5. Add as many query conditions as desired, by selecting the desired search criteria from the conditions provided.
   Note: *To remove a condition added by mistake, click the ellipse button to the left of the condition and select **Remove Condition**.*
   Note: *You can query for records that match one condition or another, or records that do not match any conditions you set, etc. Simply change the conjunction that applies to the query by clicking the word and in the line "AND applies to the main query" at the top of the screen, and select the desired option: And, Or, Not And or Not Or.*

6. Click the **Perform Query** button .
   Result: *Your results will display in the lower pane of the Prospects Query screen.*

7. **[Optional]** Click the plus sign to the left of any record in the results grid to drill down to a second grid listing additional information for each prospect.

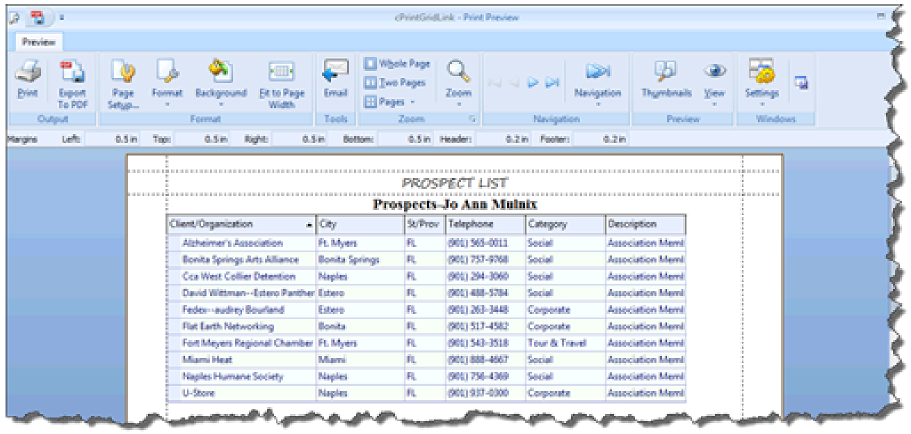


Printing a Query Grid

1. Click the **Print Grid** button , located on the right-hand side of the grid display.

2. **[Optional]** Click the **Page Setup** button at the top of the Print Preview screen to edit the text and formatting of the title of this print.

3. Click the **Print** button, located at the top of the Print Preview screen, to send the print to your printer.



Tracking Proposal Activity

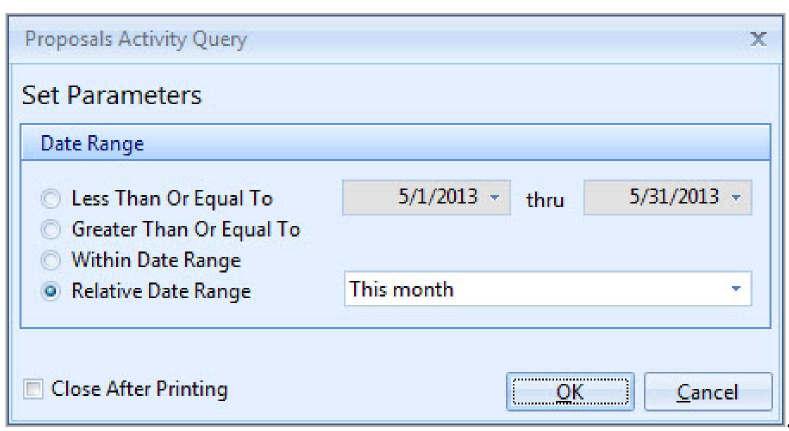
The Proposals Activity Query is a flexible tool that allows you to track any proposals that you have created for any day or date range. This powerful feature, which is available in the Professional version of Caterease, allows you to filter, sort, and group your data, and even export that data to other applications.

Tip: As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

1. Click the **Queries** sidebar and choose **Proposals Activity**.
   Result: *The Proposals Activity Query window opens.*

2. Set a Date Range for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.

3. Click **OK**.
   Result: *The Proposals Activity Query is generated, incorporating the parameters you established.*



4. **[Optional]** Click the **Quick Column Customizing** button, located at the top left of the detail grid, and select the columns you would like to display.

5. **[Optional]** Hold your left mouse button down on that column name in the list and drag left or right to reposition it on the grid.

6. **[Optional]** Click the **Save Current Window Settings** button, located on the upper right-hand side of the screen, if you want this to be the new default arrangement for this detail grid, or choose to save this as a custom grid view.
   Result: *A confirmation message appears. Click* ***Yes*** *and your new arrangement will be saved as the default look for this grid.*
   Note: *Refer to the "Queries and Detail Grids" manual for additional information about working with grids.*

caterease™

catering & event management software

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