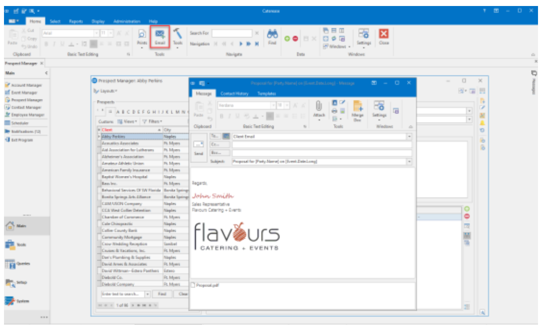
Send Batch E-mails (Professional Version)

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.
2. Click the **Email** button, located on the top left-hand side of your screen.
3. Type a Subject into the Subject field or select an option from the drop-down quickpick list.
4. Attach any desired files or prints.
5. Type the body of the e-mail into the large text block, or select a custom merge letter (if you own Marketing Tools).
6. Click **Send**.



See Sending Batch Emails from Prospect Manager

Additional Resources

Establishing a Filter in Prospect Manager
Importing a List of Prospects
Querying Your Prospective Customers
Establishing New Booking Defaults in Prospect Manager
Establishing Required Fields for Prospect Manager

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Quick Reference Guide:

Prospect Manager

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www.caterease.com

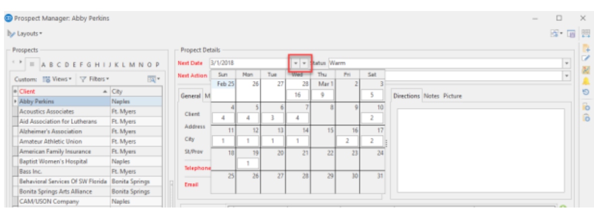
Add a New Prospect

1. Click the **Prospect Manager** button from the Main sidebar.
2. Click the **Add Record** button, located toward the top right-hand side of the window.
3. Click Yes at the confirmation prompt.
4. Complete the contact information on the **General** and **Miscellaneous** tabs.
5. Add a contact person by clicking the **Add a New Contact** button, on the **Contacts** tab, located on the lower right-hand side of the screen.

See *Adding a New Prospect*

Select a Next Action, Next Action Date, and Status

1. Click the **Prospect Manager** button from the Main sidebar.
2. Click the down arrow to the right of the Next Date field, located towards the top of the screen, and select a next-action date from the drop-down calendar.
   Note: Two calendars are available; one displays traditional dates and the other displays the number of next actions that have been set for a particular day.
3. Click the down arrow to the right of the Next Action field to select an option from the drop-down quickpick list.
   Note: Quick-pick lists are customized in **Setup** > **Quickpicks** > **Prospect Manager**.
4. Click the down arrow to the right of the Status field to select the prospect's status from the drop-down quickpick list.



See *Creating Next Actions and Action Dates*

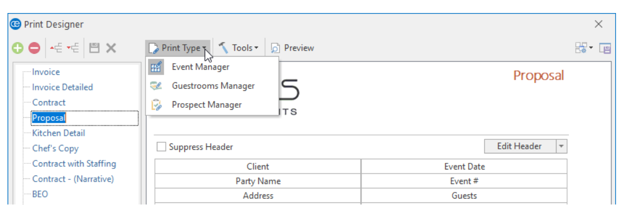
Create a Proposal

1. From Prospect Manager, click the **Proposals** tab, located towards the middle of the screen.
2. Click the **Add a new Proposal** button, located on the right-hand side of the screen.
3. Fill out the proposed event details on the **General** and **Miscellaneous** tabs.
4. Click the **Details** button.
5. From the **Food/Service** tab, click the **Display Menus** button to select menu items.
6. From the Proposal window, type any desired notes or comments by clicking on the respective tabs and typing into the text blocks.
7. When finished, click **OK**.

See *Creating a Prospect Proposal*

Use the Print Designer to Create a Proposal Print

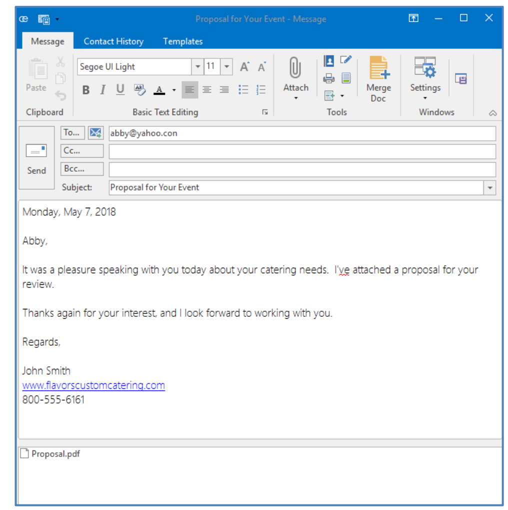
1. Click the **Print Designer** button, located on the **Setup** sidebar.
2. Click the **Print Type** button, located at the top of the screen, and select **Prospect Manager**.
3. Click the **Add Print** button, located on the upper left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for the new proposal, and press **[Enter].**
6. Click the **Edit Header** button to insert logos, merge fields, and a URL.
7. Customize the fields that should display on the print by clicking the down arrows to the right of a field and choosing another option.
8. Click into the checkbox next to any area you would like to suppress.
9. Click the **Preview** button, located at the top of the screen, to preview the print.
   Note: Your Prospect Manager should be open, with the proposed event in the background.



See *Adding a New Prospect Manager Proposal*

E-mail a Proposal

1. Search for and select a record in Prospect Manager.
2. Click the **Email** button at the top of the screen.
3. Click **Attach** > **Print**.
4. Click into the Proposal checkbox, located under Event Prints, and click **OK**.
   Note: The PDF attachment will be visible at the bottom of the window.
5. Type a subject or select an option from the drop-down quickpick list.
6. Type the body of the e-mail or select a custom merge letter (if you own the Marketing Tools add-in).
7. Press **Send**.



See *Emailing a Proposal*

Convert the Proposal to an Event

1. Click the **Proposals** tab in Prospect Manager.
2. Select, in the grid, the proposal you would like to convert to an event.
3. Click the **Create Event from Proposal** button, located on the right-hand side of the screen.
4. Click **Yes** at the confirmation prompt. You will be taken to the Event Wizard, where you can add or edit event details as needed.

See *Creating an Event from a Proposal*