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Managing Prospective Leads in Prospect Manager

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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.

Adding a New Prospect in Prospect Manager

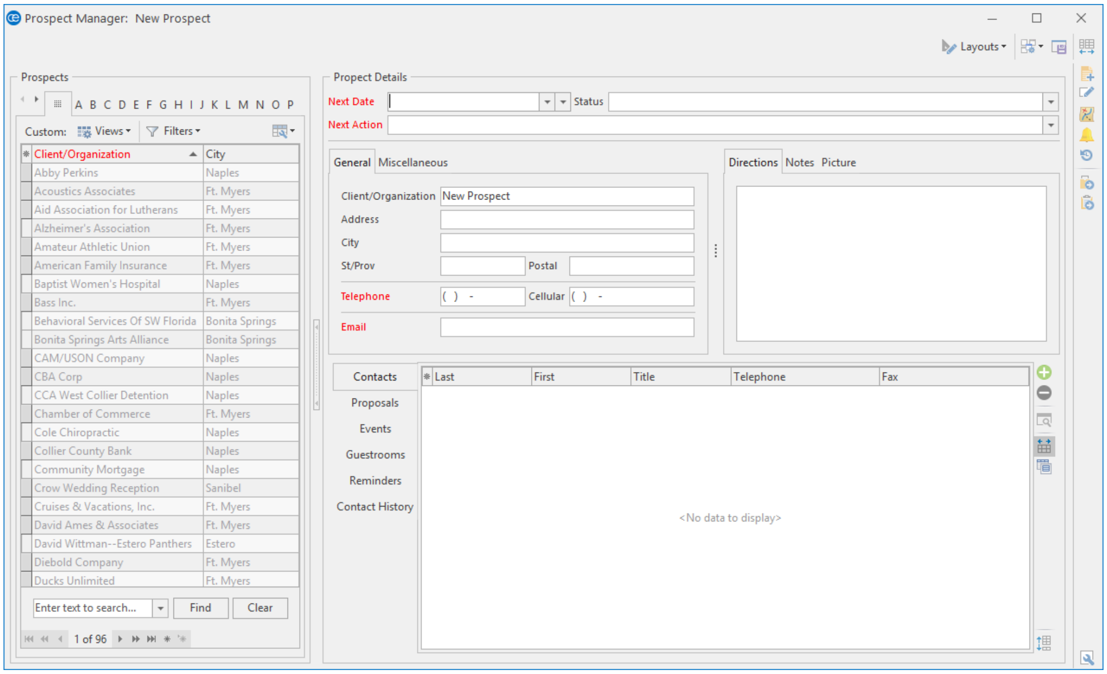
The process of adding prospects and accounts is exactly the same; it is only in concept that they differ. For example, you will find the steps below to be the same steps you would follow if you were adding an account in Account Manager. Here, however, we are discussing *prospects*. Prospects are your leads: companies or individuals that are not yet your active accounts. Prospect Manager allows you to maintain a database of prospective clients. Then, 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.

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 prospect record is added, with the default name of "New Prospect."*
   Note: *If your new prospective customer is an individual (as opposed to a company), see* "Adding a Contact Person Who Is Not a Company."

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



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 Prospect."*
   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 they are entirely optional. Also available (by default) on this tab is the option to make a client tax-exempt by clicking into the* ***Tax Exempt*** *check-box.*

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

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

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

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 transferred 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 or Prospect Manager) as the need arises.

Adding Contact People to a Prospective Account

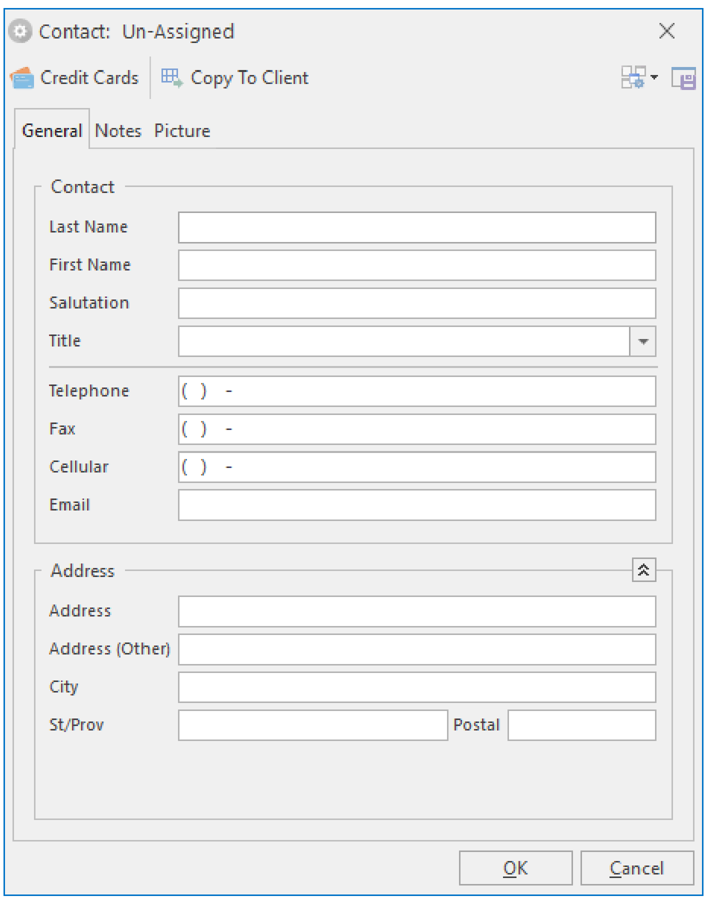
1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Search for and retrieve the prospect to which you wish to add a contact person, or add a new one.

3. Click the **Contacts** tab, located toward the middle of your Prospect Manager screen, if it is not already selected.

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

__Tip:__ You can click __Copy to Client__ at the top left 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.



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, or simply type into the field. *See "Creating Quickpick Lists for Status, Next Action, and Proposal Status," below.*

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 box 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.*

Adding a Contact Person Who is not a Company

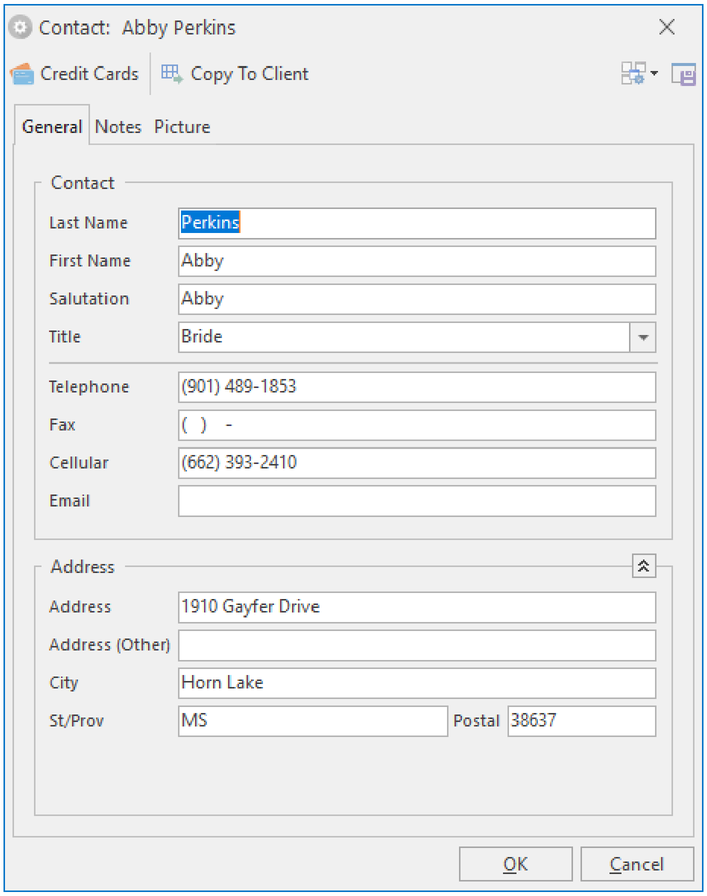
A prospective customer can be added in Prospect Manager, if you want the new customer to be included as a "prospective lead" rather than an active client. The prospect can be entered as a company or as an individual. This topic discusses the latter option.

Adding A Contact Person 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 (or you may type directly into the field). *See "Creating Quickpick Lists for Status, Next Action, and Proposal Status," below.*

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 Cards** 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 left 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.*

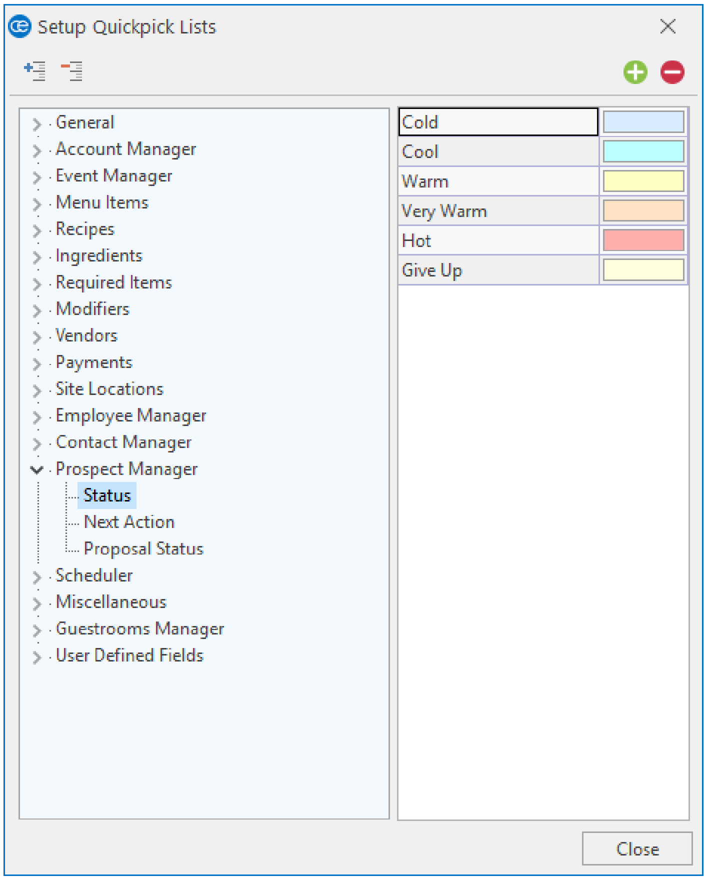
13. Click **OK** to close the Contact window.

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

Throughout your Caterease program there are several drop-down menus, or quickpick 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**.

   ***Note:** Click the **Full Expand** button to expand all selections.*

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]**.

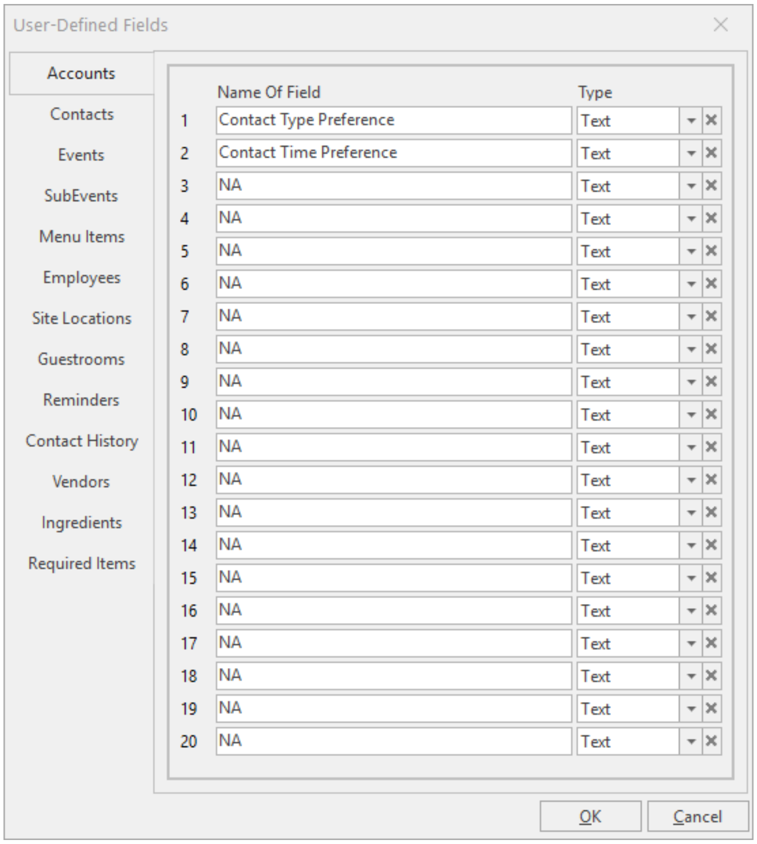
5. **[Optional]** Click inside the field and then click the down arrow to the right of the field to choose a default color for the new Status name.
   ***Note:** Access a custom color palette (for the purpose of color-coding your statuses) by clicking the **Ellipsis** button, located to the right of the down arrow.*

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. Click the **User-Defined Fields** button from the **Setup** sidebar.
   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.
   Note: *Click the X, to the right of the field, to reset to N/A, with a Type of Text, and to also clear any required field settings.*

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 on the Manager screen you would like to place the user-defined field.

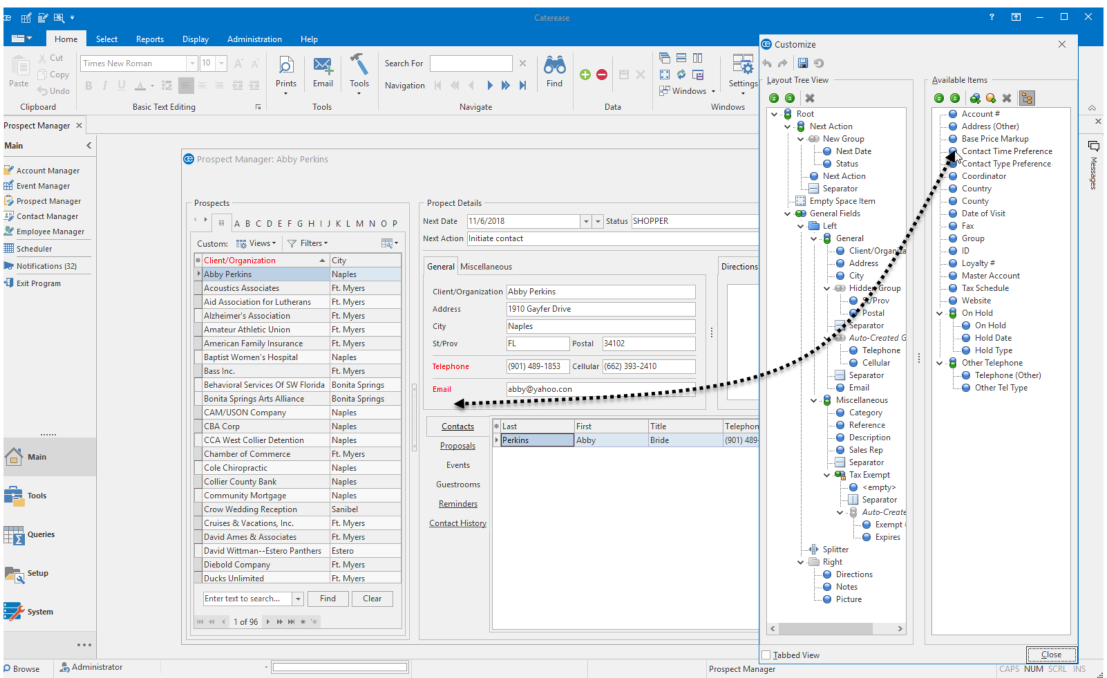
2. Right-click directly on any field name or tab name on the screen.
   Note: *Right-clicking within a field brings up a completely different pop-up menu.*

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

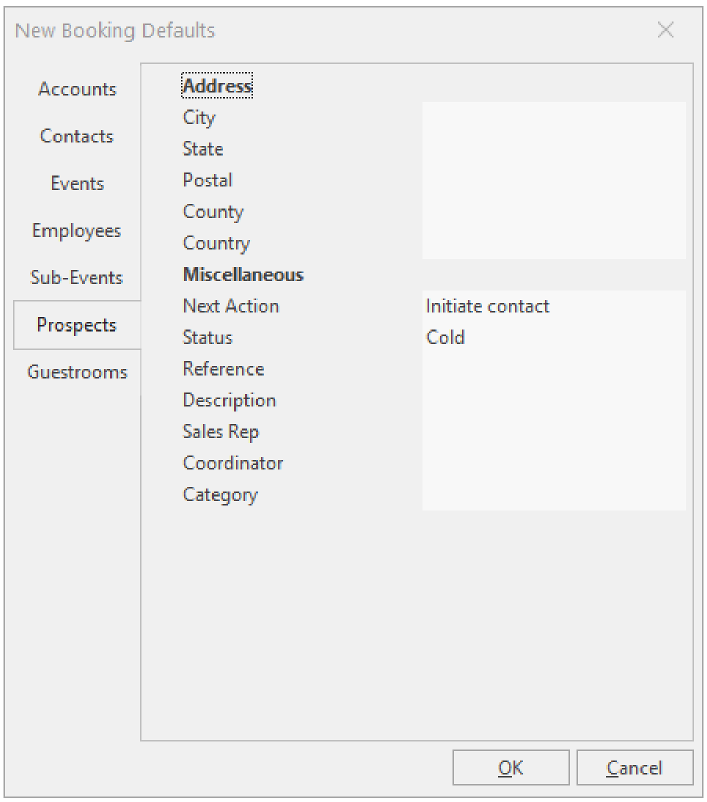
The New Booking Defaults dialog box allows you to set certain default values for various fields in the program; therefore, whenever you add a new prospect to Caterease, its city, state, etc., will default to the values you enter here, within the New Booking Defaults window. This feature is available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

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, then 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.*

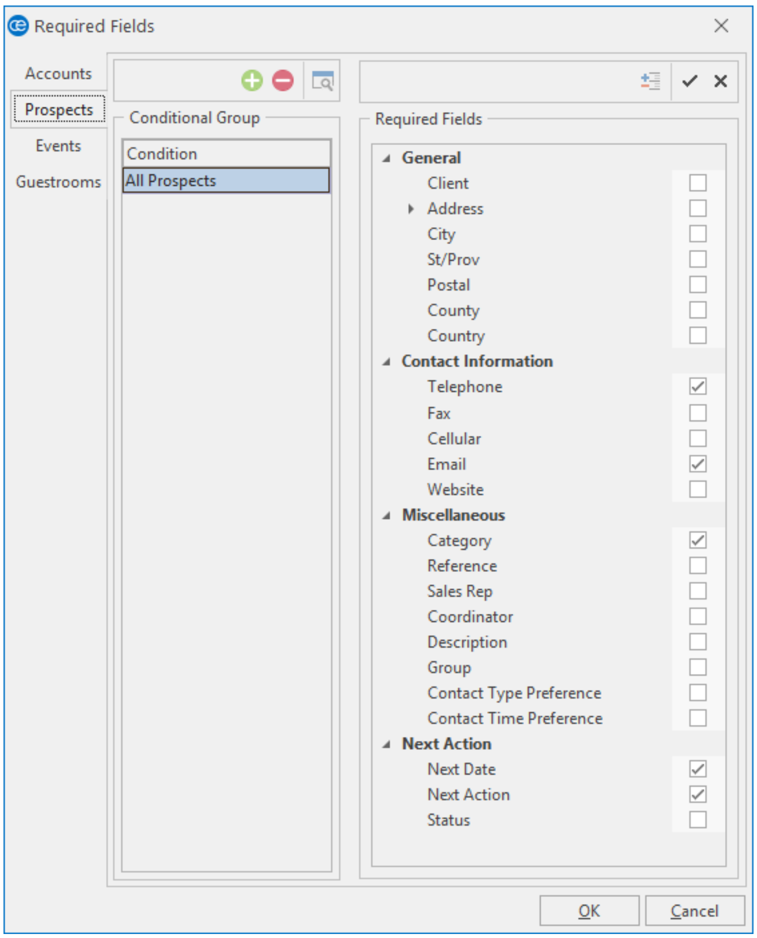
Establishing Required Fields for Prospect Manager

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. This feature is available in the Standard and Professional versions of Caterease.

Making Fields Generally Required

1. Click the **Administration** ribbon tab at the top of the screen.

2. Click **General > Required Fields**.
   Result: *The Required Fields window opens.*



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 **Prospects** tab, located on the left-hand side of the window.

2. In the right-hand pane of the window, click the checkbox next to any field you want to be required information, optionally clicking the expand button 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.)*

3. 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 high-lighted 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

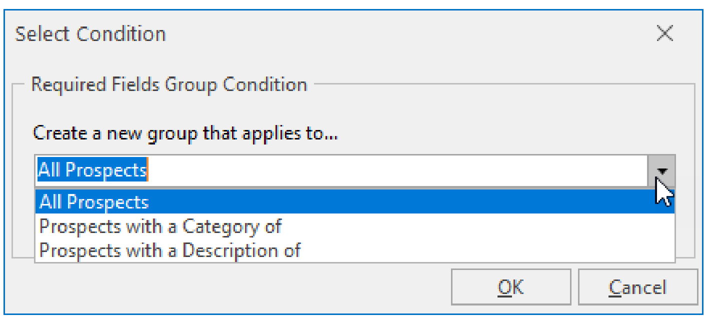
1. Click the **Administration** ribbon tab at the top of the screen.

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 expand button 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.

Note: 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 prospects reads "Category = Corporate" and your second condition reads "Description = Association Member," when the program finds a 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.), be the LAST condition listed.

Unit 2: Completing Additional Prospect Information Tabs

In this section, you will learn:

Copying Directions and Pasting into the Directions Tab
Copying Prospect Notes From the Scratch Pad
Inserting an Image into a Text Block

Completing Additional Prospect Information Tabs

You can use additional tabs in Prospect Manager to add detailed directions, notes, and images.

Using the Mapping Interface

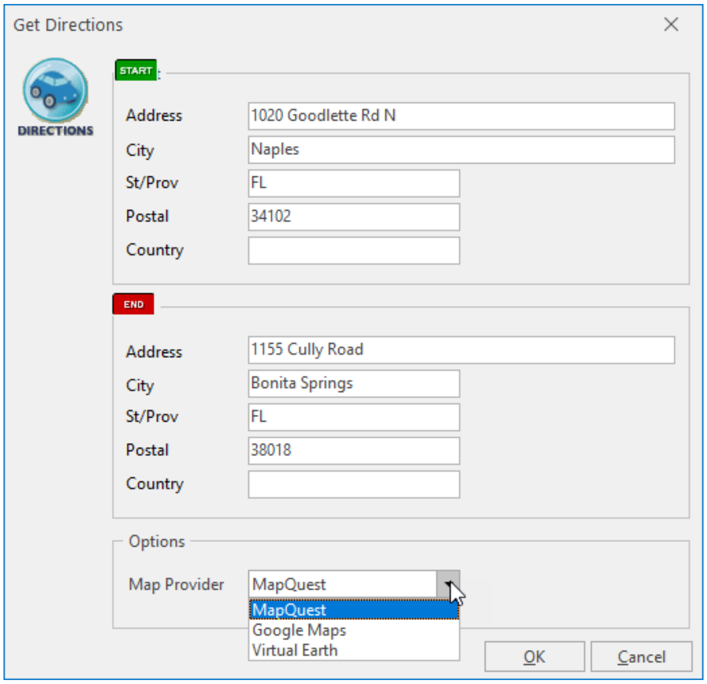
You can include directions to the currently selected prospect's facility by typing any text into the Directions tab and formatting the directions. You also have the option of copying directions from the Get Maps interface and pasting them into the Directions tab.

1. Click the **Get Map** button on the toolbar on the right-hand side of your Prospect Manager screen, or access this button from your **Tools** menu, depending on your personal configuration.
   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.*

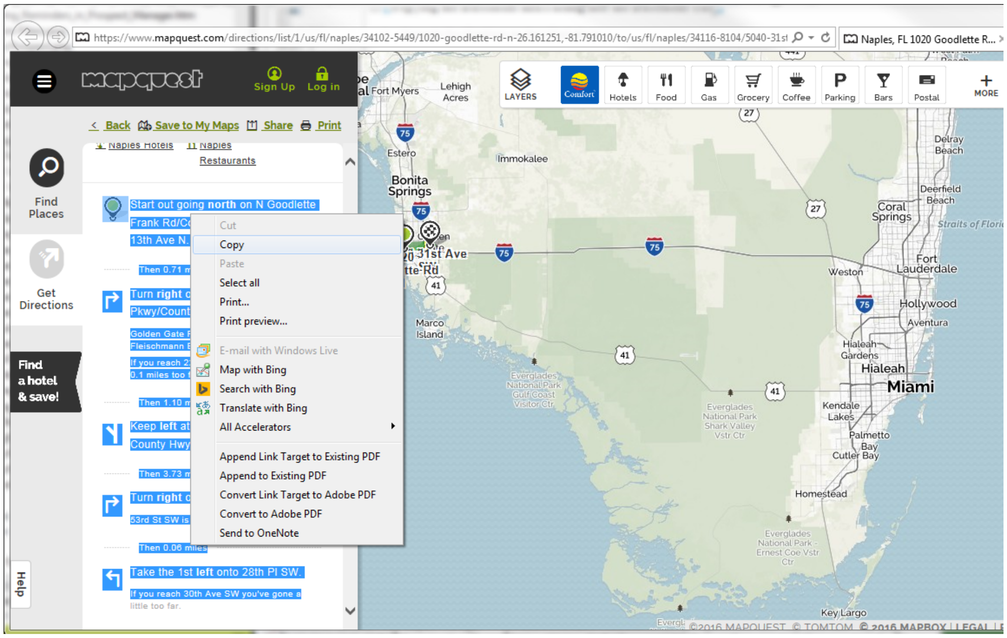
4. **Optional]** Copy the directions and paste them into the **Directions** tab, located on the upper right-hand side of the screen (see section below).



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. Click **OK** to close the Get Directions window.

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

6. 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.*

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

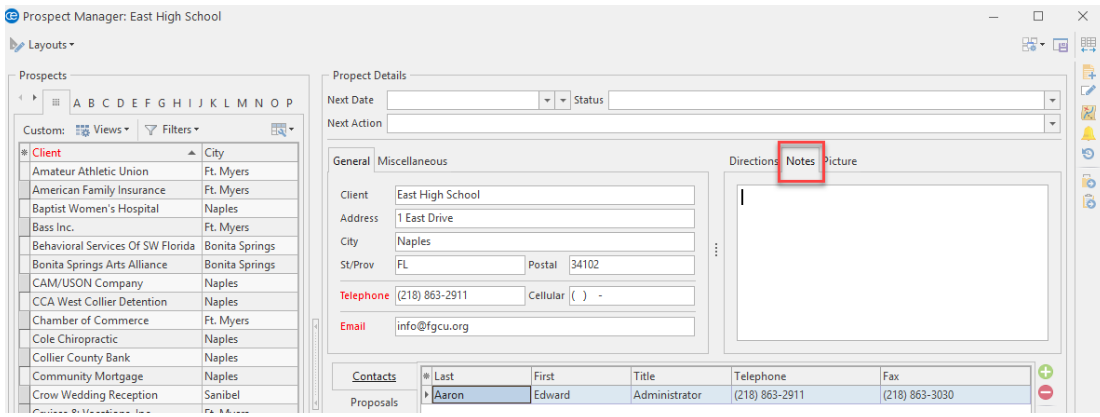
Using the Prospect Manager Notes Tab

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 your 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

***Tip:** Set up your Scratch Pad in **Administration > Lists > Scratch Pad**.*

1. Click the **Notes** tab, located in the middle of the Prospect Manager screen.

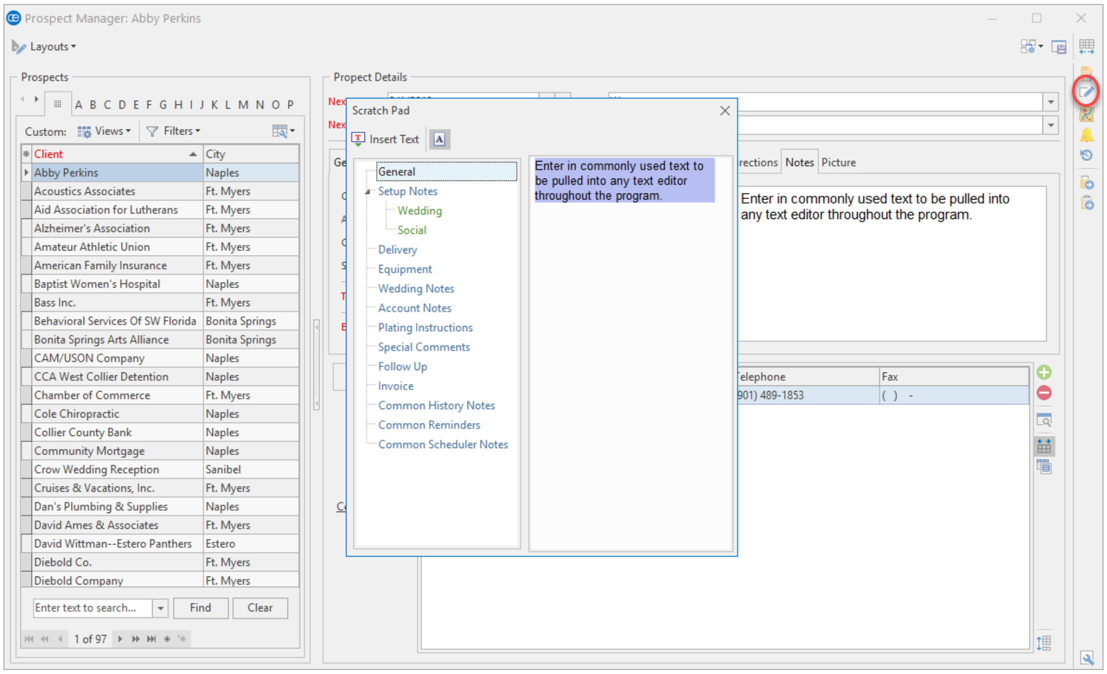
2. Click into the Notes text block.

3. Click the **Scratch Pad** button , located in the toolbar on the upper right-hand side of your screen or from your **Tools** menu, depending on your personal configuration.
   ***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.

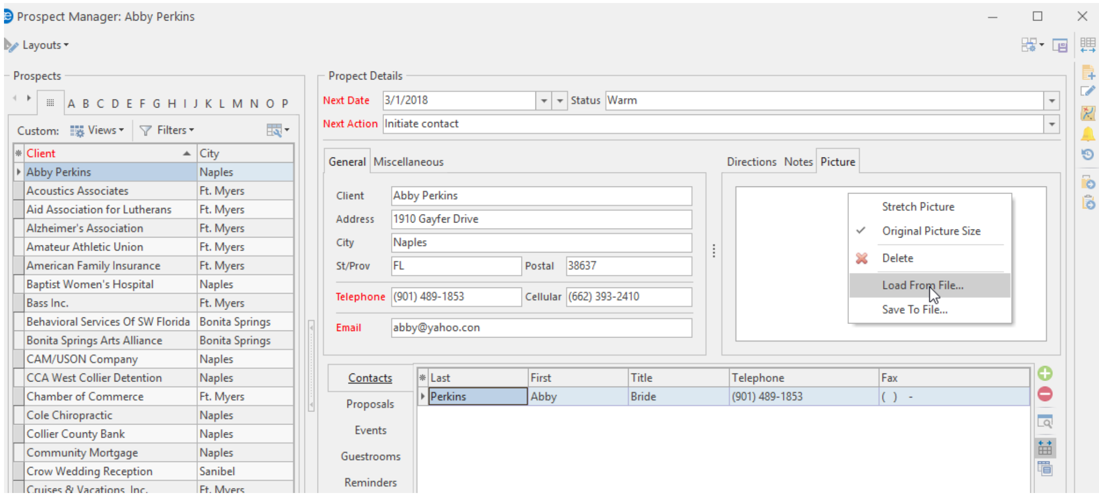
Inserting an Image

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.



5. Click the **Save** button, located in the main toolbar at the top of your screen.

Unit 3: Creating Next Actions and Next-Action Dates

In this section, you will learn:

Adding Next Actions and Next-Action Dates
Changing the Prospect Status
Establishing a Filter
Saving a Filter
Retrieving a Previously Saved Filter

Creating Next Actions and Action Dates

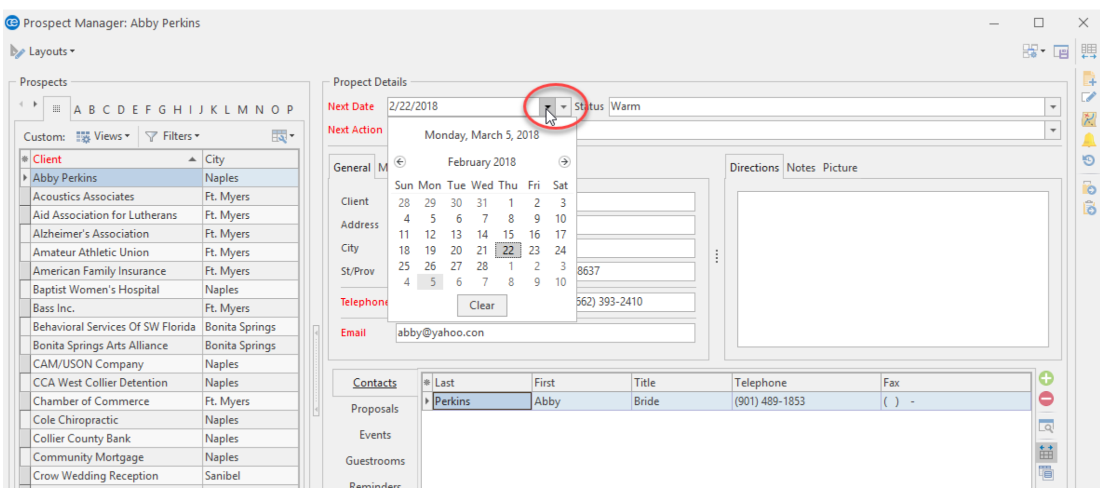
When you are prospecting your leads in Prospect Manager, you will want to schedule the next action you need to take for each of those leads. This Next Action field is a quickpick list you can customize in order to create a list of common actions and not have to type the same thing more than once. In 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!

Adding Next Actions and Next-Action Dates

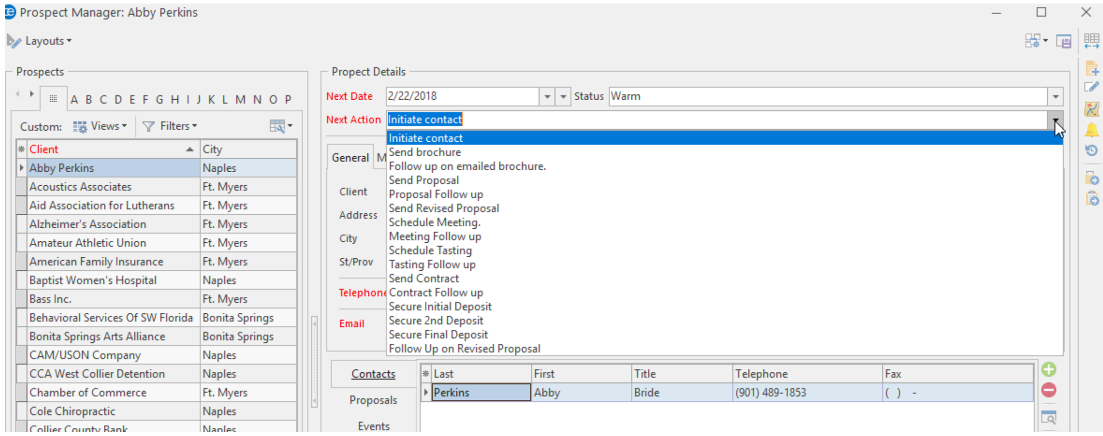
1. Locate the prospect record you would like to set a next action for, or add a new prospect.

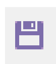
2. Click into the Next Date field, located at the top of the screen, toward the middle.

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 Next Date field) drops down the standard calendar view; the second drop-down calendar indicates the number of next actions that have been set for a particular date.*



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



5. Click the **Save Changes** button , located in the main toolbar at the top of your screen.

Setting a Prospect Status

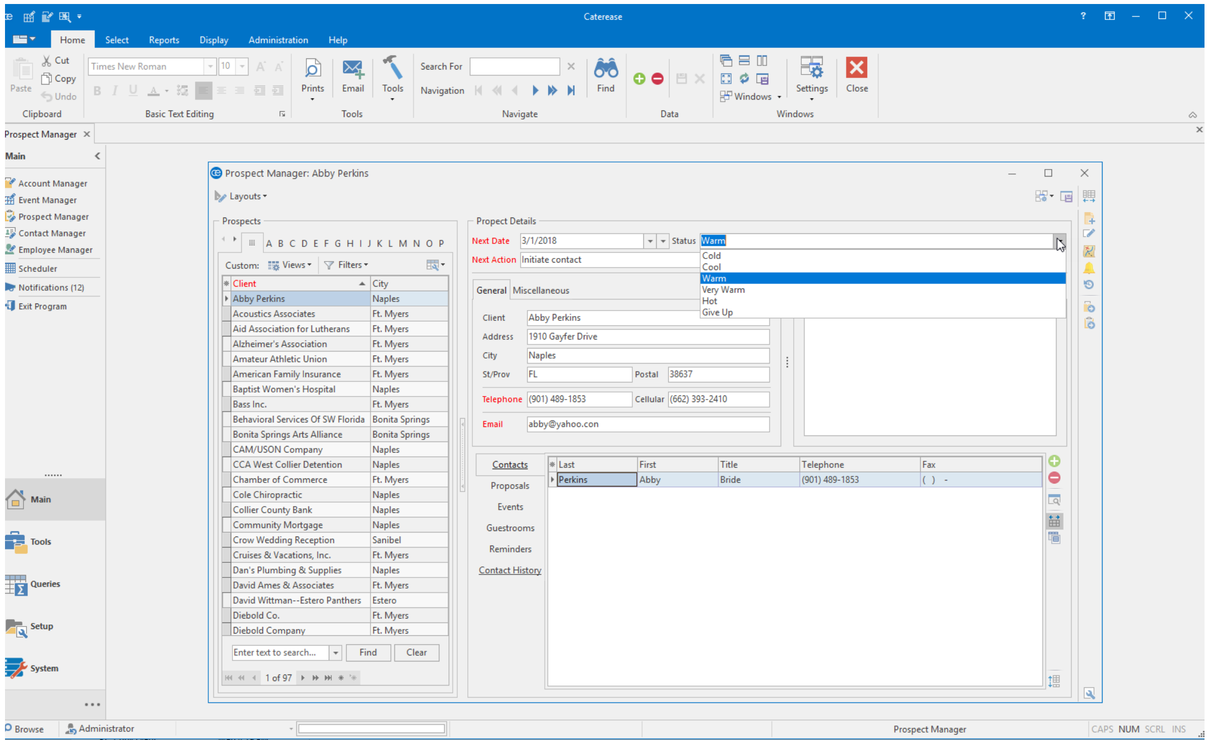
You can assign a status to a prospect, using a custom quickpick list of options, so you can track its progression from lead to account.

Assigning a Status to a Prospect

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

2. Click the Status 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 Changes** button, located in the main toolbar at the top of your 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 main Prospect Manager screen, click the **Display Full Grid** button, located at the upper right-hand side of your screen.
   Result: *Your Prospect Manager opens in full-grid mode.*

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

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

4. **[Optional]** Hold your left mouse button down on a column title in the customization window and drag up and down to reposition that column in the list of customization options.
   Note: *You can also drag column headings left and right in the grid itself.*

5. Click on the funnel at the right of a particular column heading, e.g., the column heading labeled Next Action, 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.

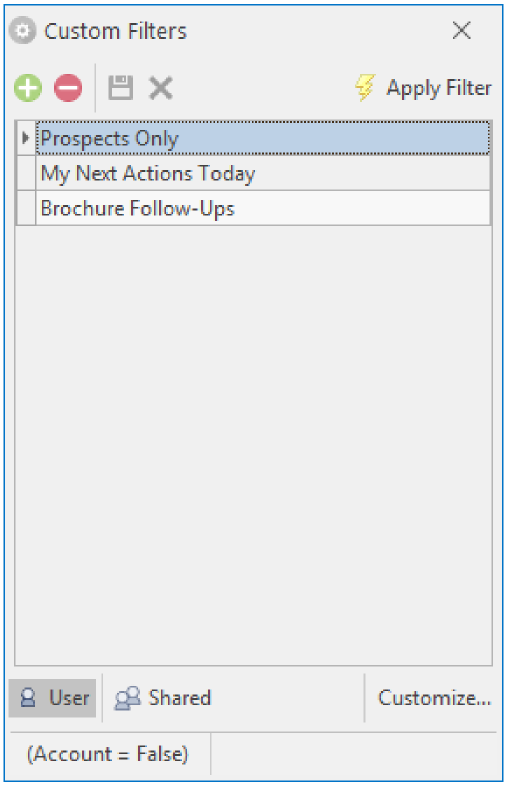
3. Click **Custom**.
   Result: *The Custom Filters window opens.*

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. (Available if you own the Professional version of Caterease.)
   Note: *The **User** button, selected by default, means this filter is only available under your user name.*

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.

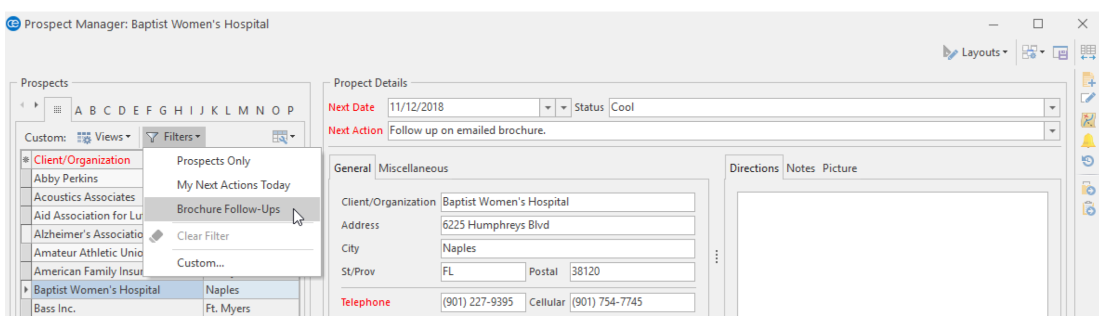
7. Click the **Save Current Filter** button .
   Result: *Your new filter is saved.*



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 and Contact History Notes in Prospect Manager

In this section, you will learn:

Adding a New Reminder
Viewing Active Reminders
Retrieving Linked Reminder Items into a Manager
Dismissing or Snoozing Reminders
Creating a New Contact History Note from Prospect Manager
Viewing/Editing Contact History Notes in Prospect Manager
Customizing Columns in the Contact History Grid
Showing the History Comment in the Contact History Grid

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.

Creating a New Reminder

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

2. Click the **New Reminder** button , located on the toolbar on the right-hand side of your screen, or from the **Tools** button at the top of the screen, depending on your personal configuration.
   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.

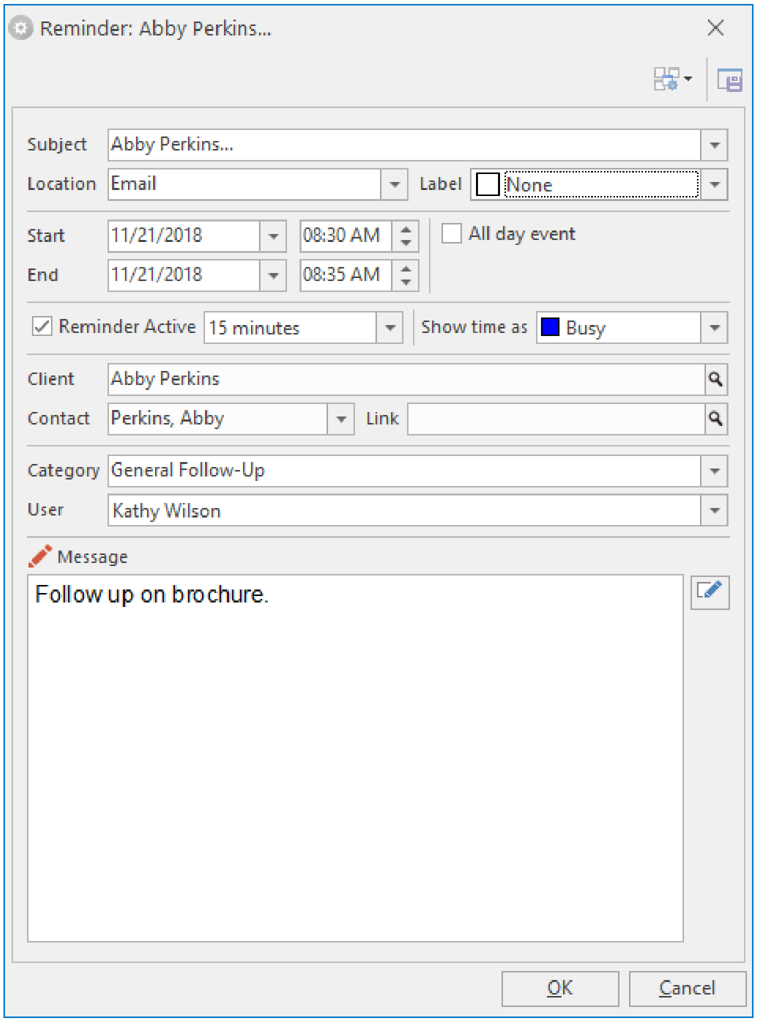
   - **Label**: Optionally assign a **Label** to the reminder by selecting an option from the drop-down list of options.

   - **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 an option from the quickpick list.
  Note: *Select* ***Everyone*** *if you would like the reminder to be seen by all users.*

5. Click into the Message 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.*

Using the Active Reminders Tool

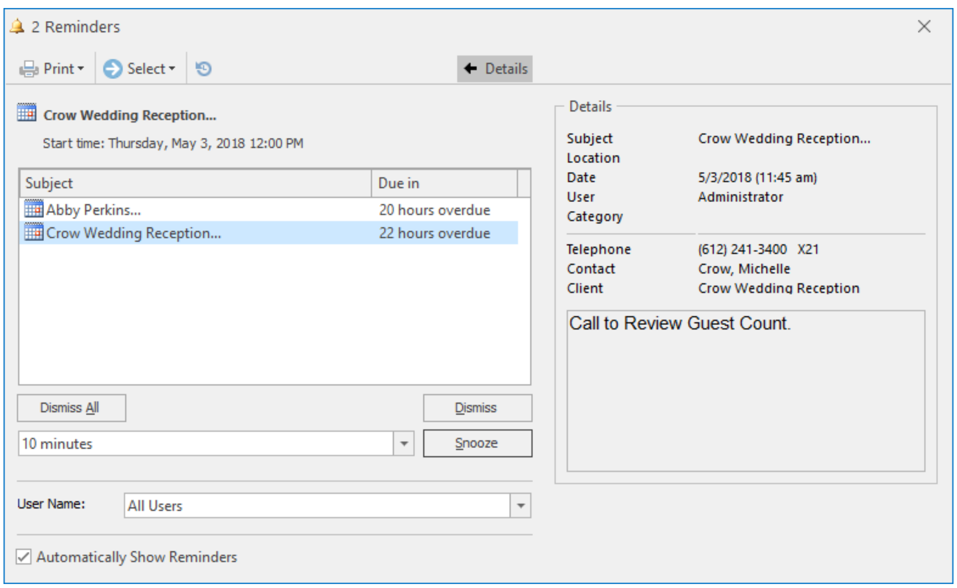
The Active Reminders tool shows all reminders you currently need to address. The view you see is dependent upon whether you have told Caterease to show you all reminders or just those for a specific user, and also on how many days in advance and how many days back you have told the program to show your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



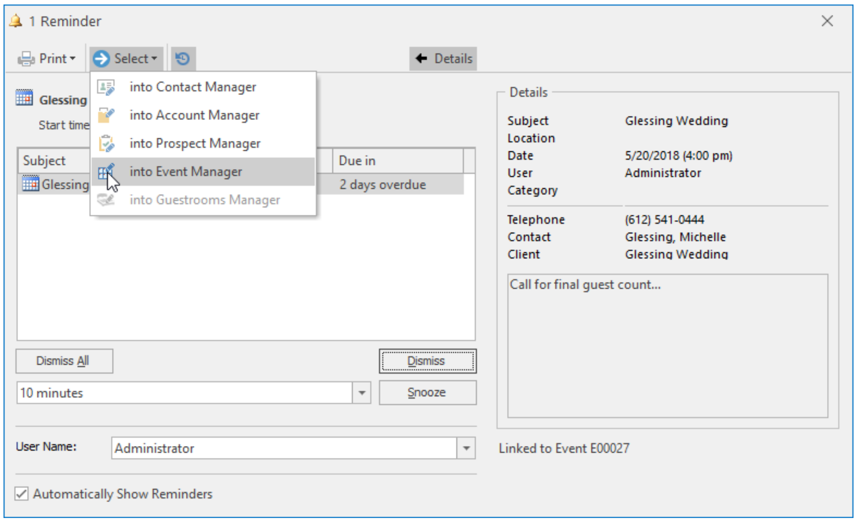
3. Click any reminder on the Reminders window.
   Note: *If you are logged in as an Administrator, you can elect to see reminders for all users or for individual users by clicking the down arrow to the right of the User Name field.*

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 window, 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 Guestroom Manager:** This option opens Guestroom 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 window, 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 window, 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 from Prospect Manager

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 History Item** button, located in the toolbar on the right-hand side of your screen, or from the **Tools** drop-down list from the **Home** ribbon tab, depending on your personal configuration.
   Result: *The Contact Item window opens.*

   Note: *You can also click the* ***Add a New Contact History 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.

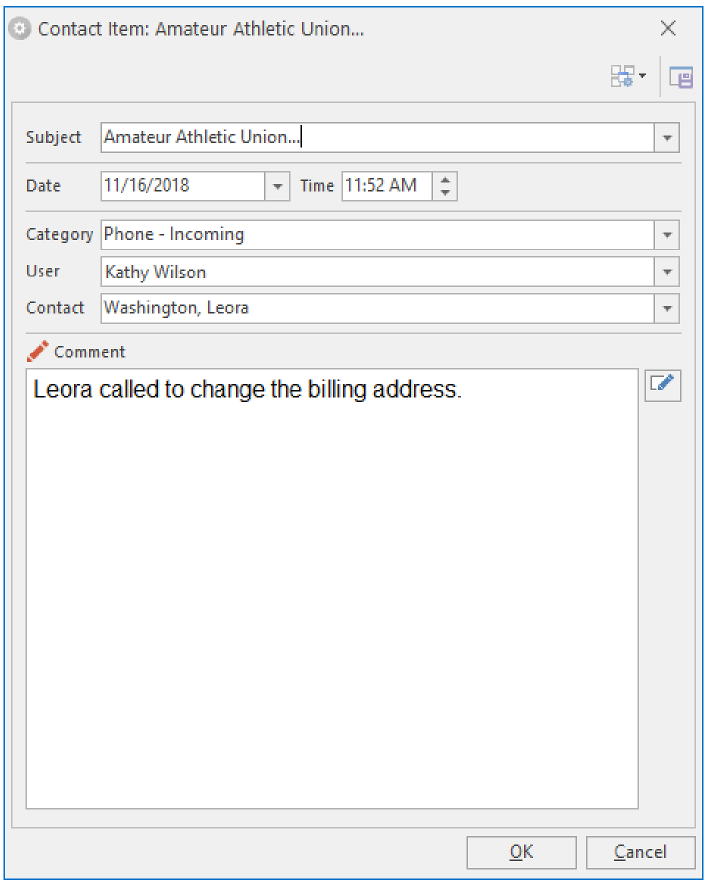
Note: *The current time is populated, by default.*

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 an option from the drop-down 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 pre-formatted text.*

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



Managing Contact History Notes in Prospect Manager

Contact History Notes (records of phone calls you've made, tasks you've done, etc.), can be viewed and even edited 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.*

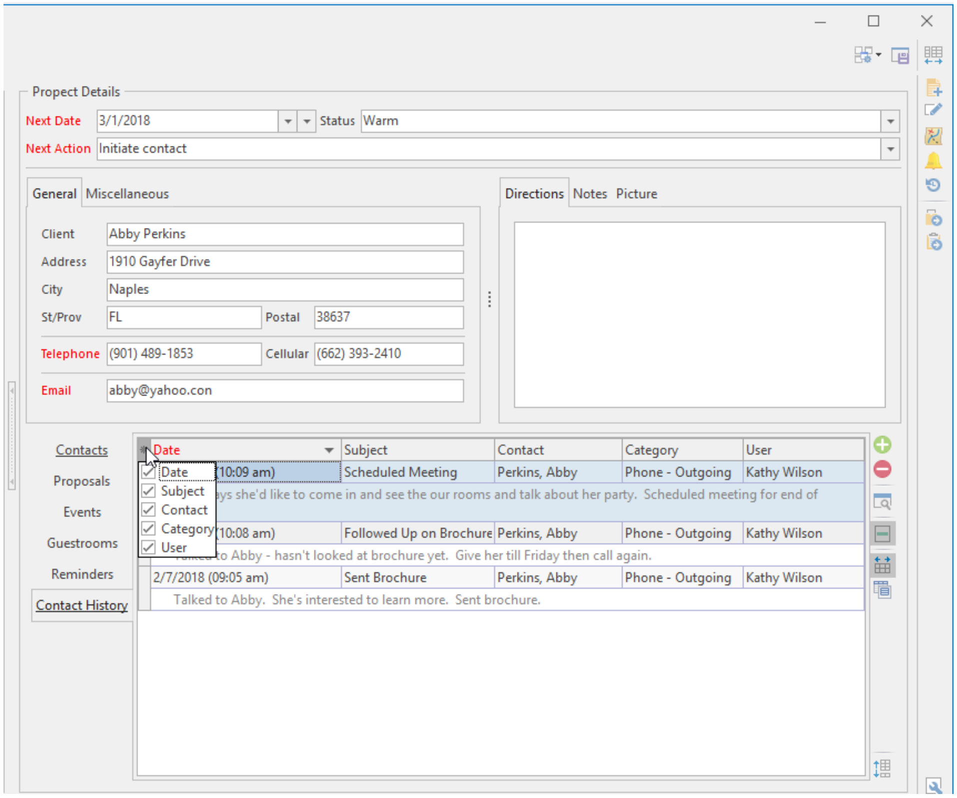
Customizing Columns in the Contact History Grid

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

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.



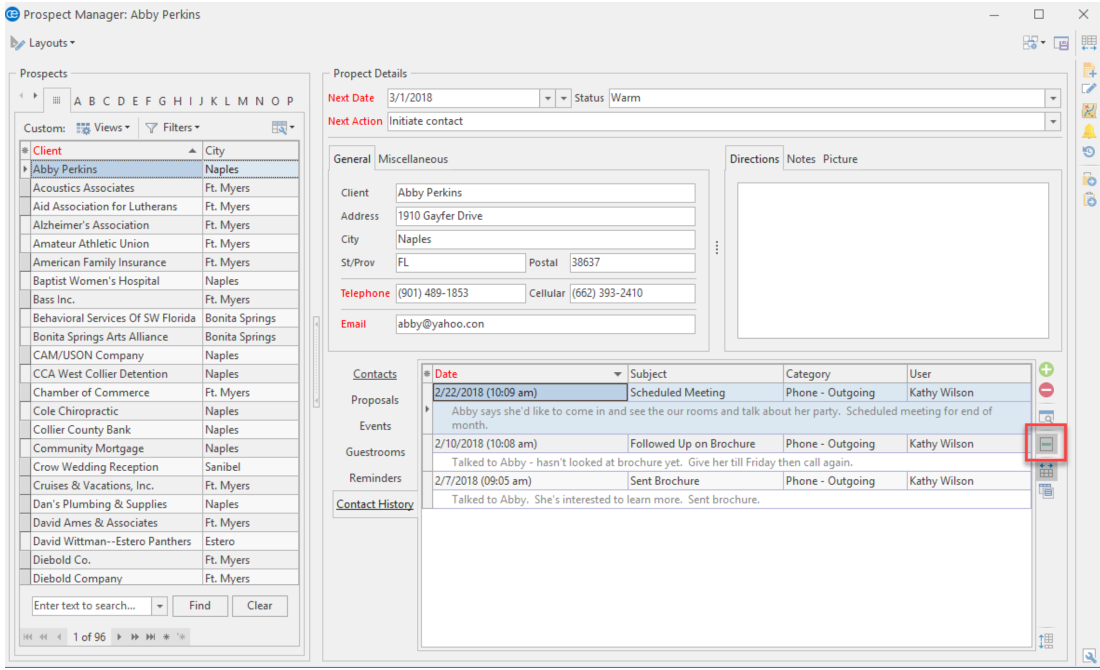
Showing the History Comment in the Contact History Grid

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

1. Click the **Contact History** tab at the bottom of your Prospect Manager screen to access contact history details.

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 contrasting text font 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

In this section, you will learn:

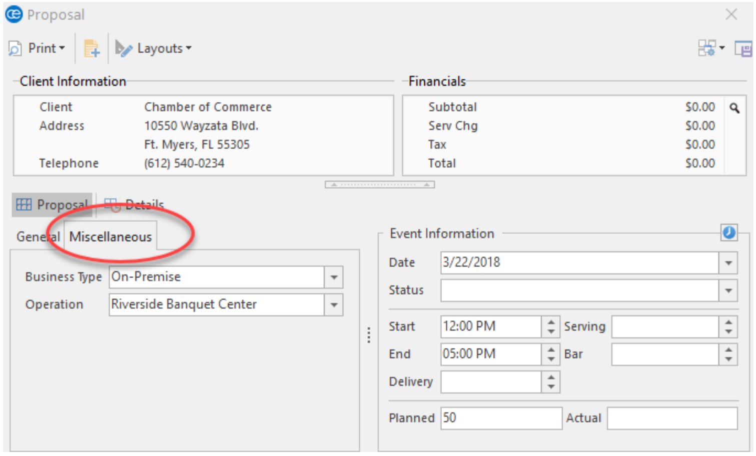
Filling out the Proposals Tab
Filling out the Details Tab
Printing a Prospect Proposal
Modifying a Proposal Print
Sending E-mails from Prospect Manager
Copying a Prospect Proposal
Creating an Event from a Proposal
Adding Events from Prospect Manager

Creating a Prospect Proposal

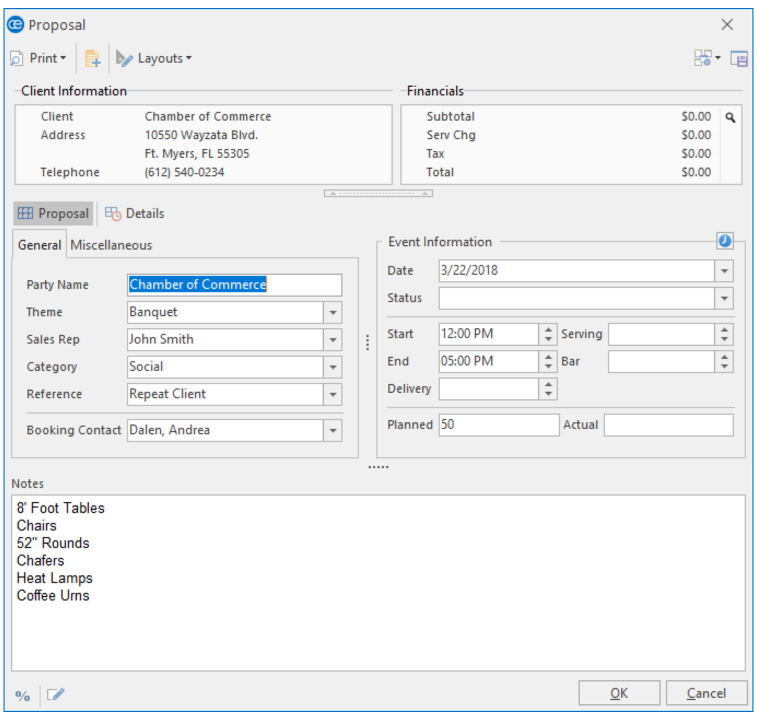
You can create a detailed proposal in Prospect Manager without needing to make the prospect into an active client. Basic details, such as theme, date, times, price estimates, etc., can be included, and prints that include these details can be easily generated.

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 your screen.
3. Click the **Add A New Proposal** button , located on the right-hand side of your 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 expected guest count into the Planned or Actual field.
11. **[Optional]** Click the **Miscellaneous** tab, located to the right of the **General** tab, and make your selections from the drop-down lists.



12. **[Optional]** Click into the <u>Notes</u> text box and type any proposal notes, or use the Scratch Pad  to insert pre-formatted text.



Filling out the Details Tab

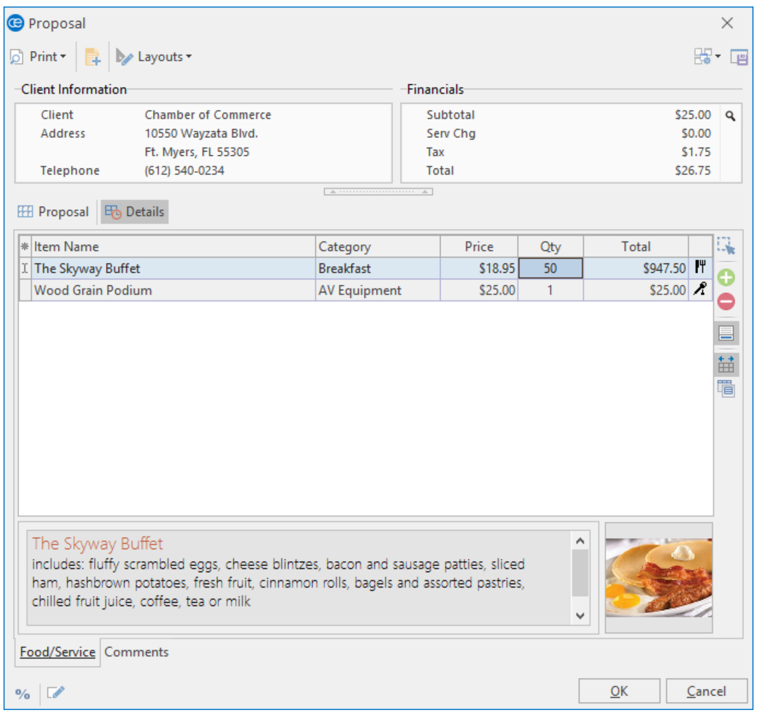
1. Click the **Details** tab, located to the right of the **Proposals** tab.
   Result: *The Proposal window opens, and you are positioned on the* ***Food/Service*** *tab.*

2. Click the **Display Menus** button, located on the right-hand side of your 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 box or retrieve pre-formatted text from the Scratch Pad.

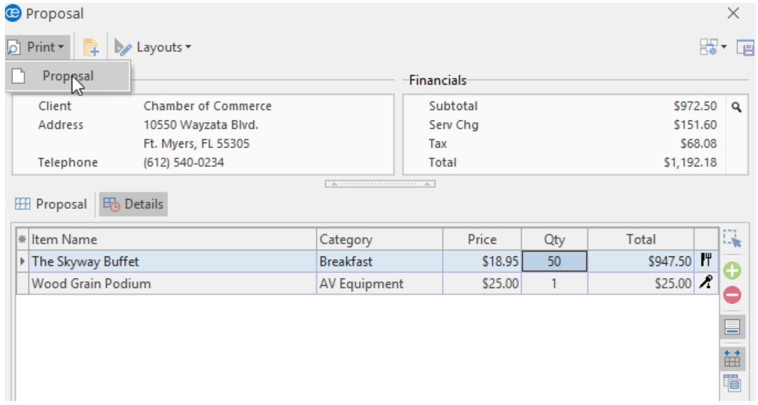
5. When finished, click **OK**.



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.*



***Tip:** Edit Prospect Manager Prints in Print Designer by selecting Prospect Manager from the Print Type menu at the top of your Print Designer window.*

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.

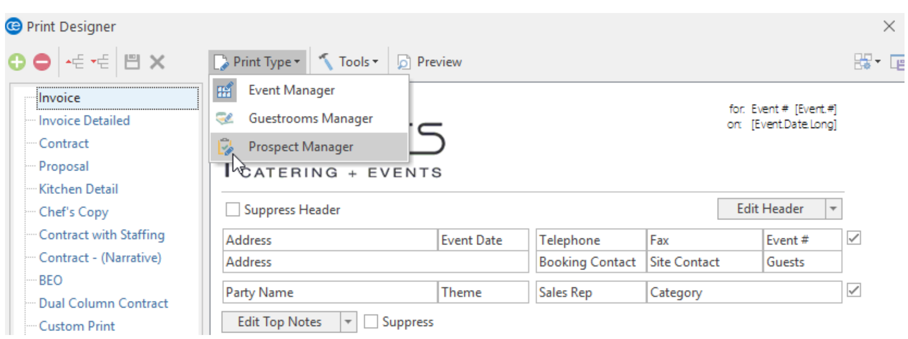
Modifying a Proposal Print

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

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

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

4. Choose **Prospect Manager.**
   ***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. From Prospect Manager, use the Search tools to find the contact to whom you would like to send an e-mail.

2. 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.*

3. 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.

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

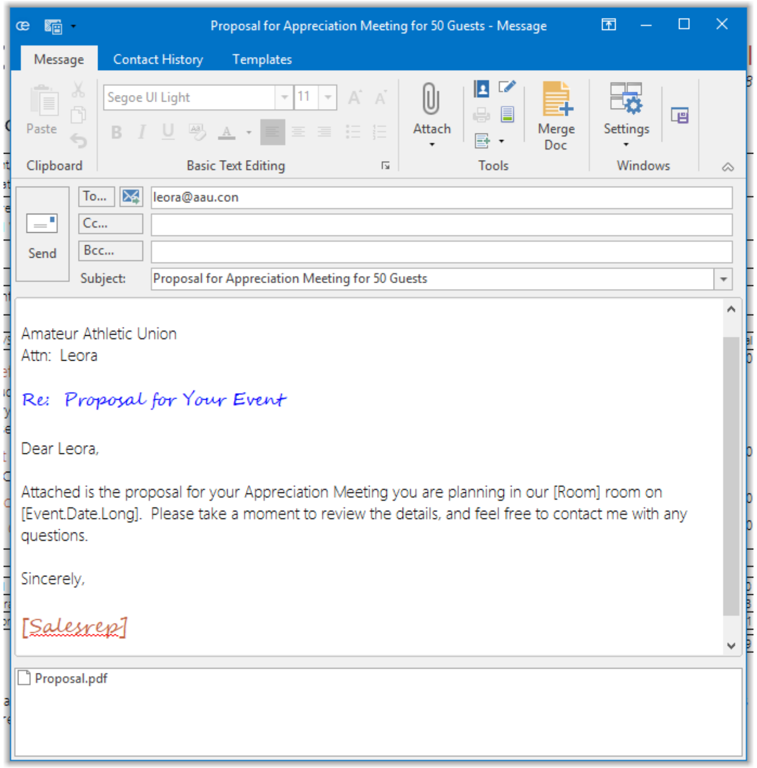
5. **[Optional]** In the Bcc field, type the e-mail address of the blind-carbon-copy recipient here (separate multiple recipient addresses by semicolons).

6. 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.

7. 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.*

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

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



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.

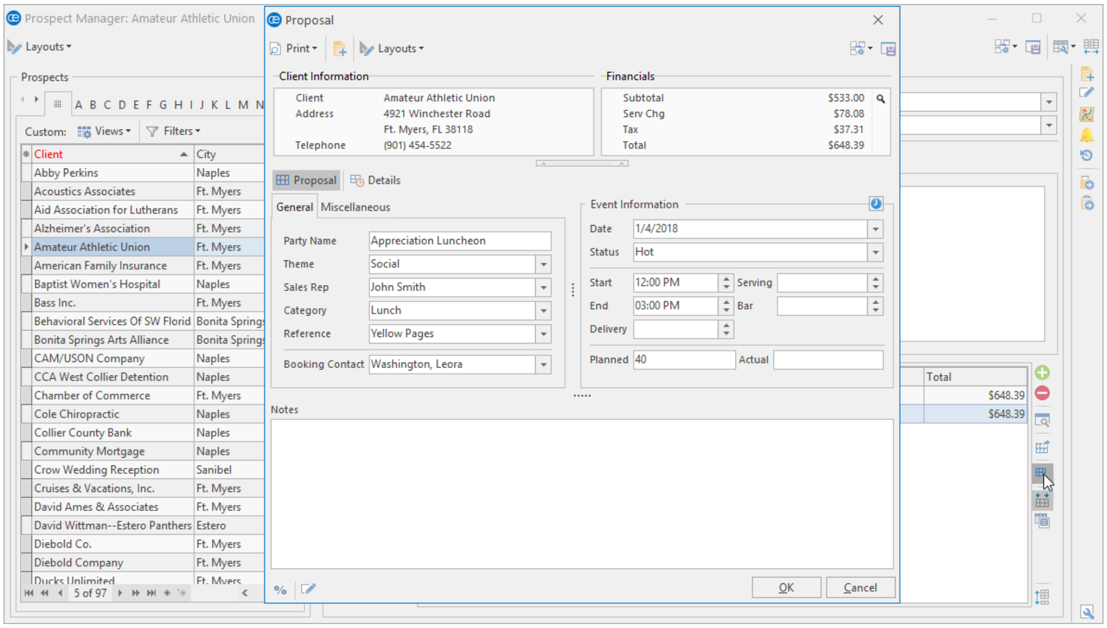
2. Click the **Proposals** tab, located near the bottom of your screen.

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 your 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.

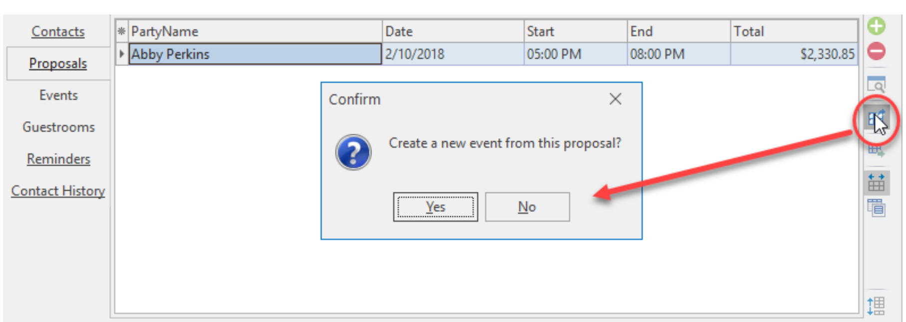
Creating an Event from a Proposal

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 your 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 your 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 described below, the program automatically converts that lead into an active account.

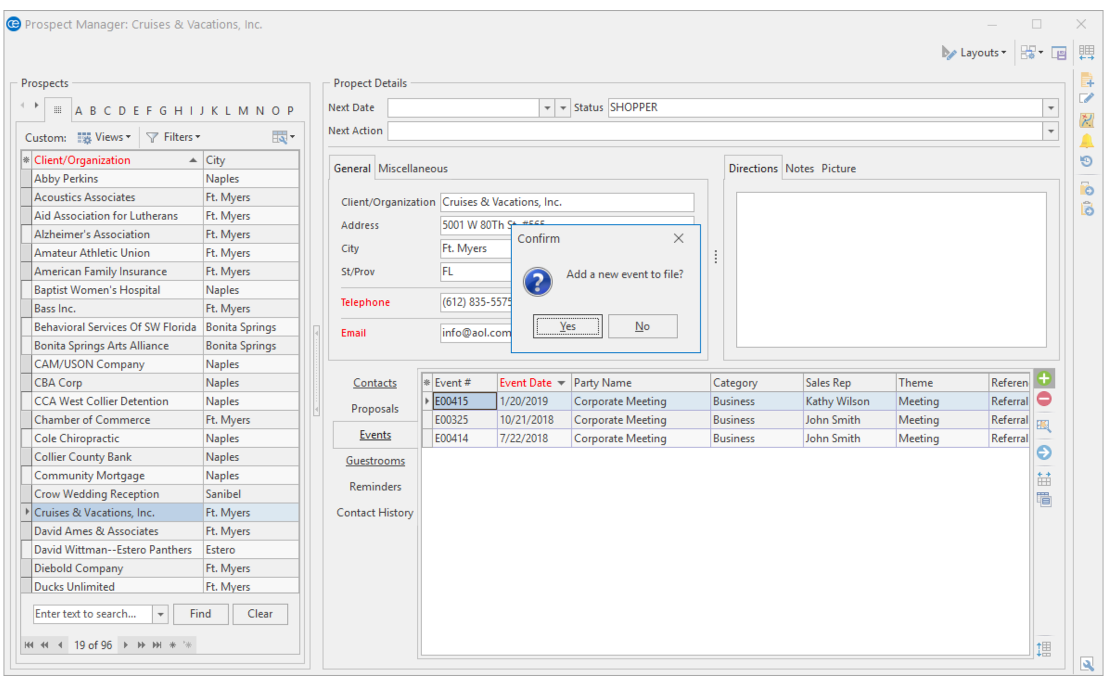
1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** sidebar.

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

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.*



Unit 6: Storing Off-Premise Site Information

In this section, you will learn:

Creating a Default Site Location

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.

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 in the toolbar on the right-hand side of your screen, or from the **Tools**button at the top of your screen, depending on your personal configuration. You may need to add this button to your list of tools.
   Result: *The Default Site Location window opens.*

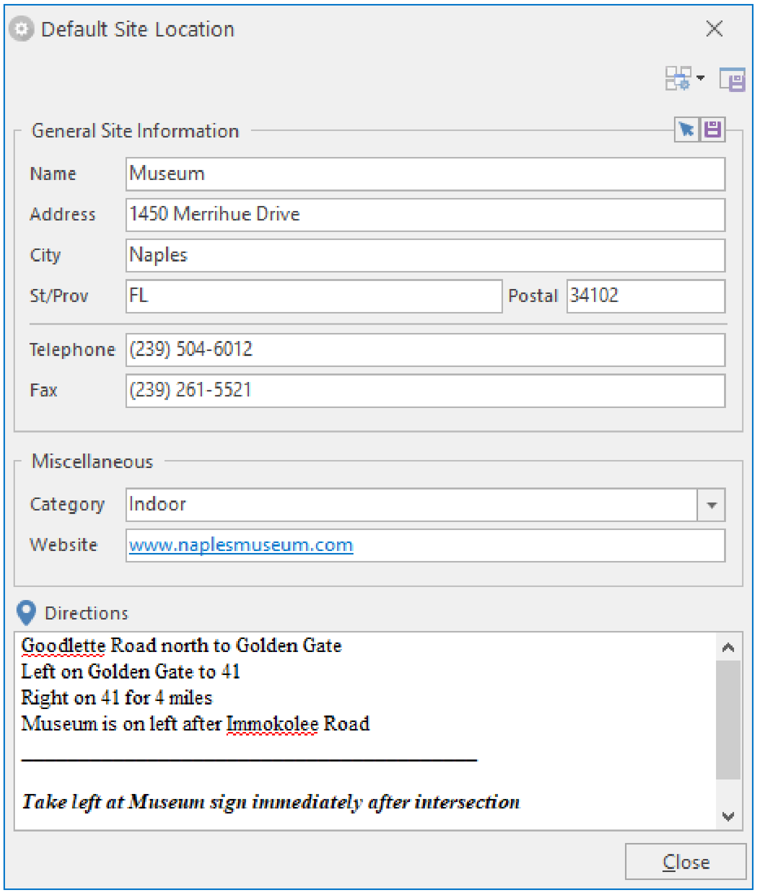
3. Type into the General Site Information fields, and press **[Enter**] or **[Tab]** to move from one field to another.

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 directions (or paste copied text) into the Directions text block.

7. Click the **Save** button (diskette) to save the new site location to your list of site locations.
   Note: *Click the* ***Select*** *button (arrow) to retrieve a previously added site location.*


Default Site Location
General Site Information
Name
Museum
Address
1450 Merrihue Drive
City
Naples
St/Prov
FL
Postal
34102
Telephone
(239) 504-6012
Fax
(239) 261-5521
Miscellaneous
Category
Indoor
Website
www.naplesmuseum.com
Directions
Goodlette Road north to Golden Gate
Left on Golden Gate to 41
Right on 41 for 4 miles
Museum is on left after Immokolee Road
Take left at Museum sign immediately after intersection
Close

Unit 7: Changing Account Status

In this section, you will learn:

Changing from a Prospective Account to an Active Account
Changing from an Active Account to a Prospective Account
Assigning a Master Account to a Prospect
Displaying the Master Account Field
Viewing Clients by Master Account
Viewing Events or Contact People for All Clients of a Master Account

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. Additionally, you can link related prospects and accounts together under one "Master Account," allowing you to review events and even contact people for all of them collectively, as one group.

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 program Skin selection.*

3. Click on a prospect from within the grid.

4. Click the **Change To Account** button , located in the toolbar on the right-hand side of your screen or from the **Tools** button at the top of your screen, depending on your personal configuration.
   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.*

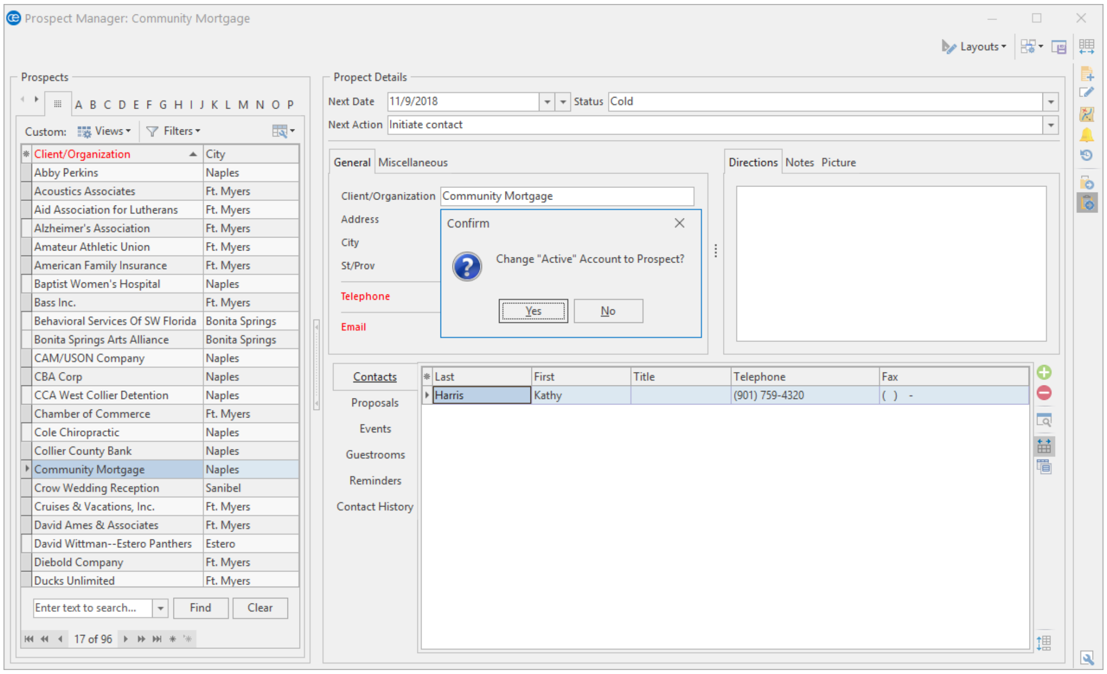
Changing from an Active Account to a Prospective Account

Tip: *Depending on your program Skin selection, active accounts and prospective accounts are separated out according to their color.*

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 in the toolbar on the right-hand side of your screen or from the **Tools** button at the top of your screen, depending on your personal configuration.
   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.*



Displaying the Master Account Field

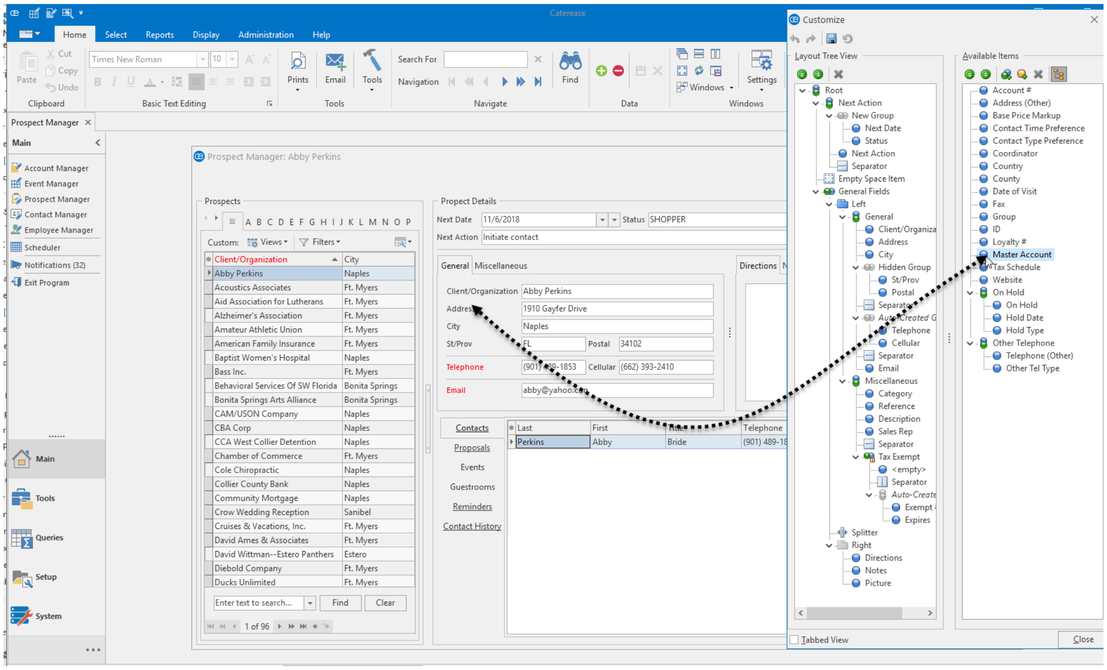
1. In Prospect Manager, search for and select the prospect or account you would like to add to a master account.

2. Click on a tab at the top left (**General**, **Miscellaneous**) where you want to display the Master Account field.

3. Click your right mouse button within the tab and choose **Customize**.
   Result: *The Customize window for the form opens.*
   Note: *Do not right-click inside of fields; instead, click on the tab itself.*

4. On the right-hand side of the Customize window, in the **Available Items** area, hold your left mouse button down on the field labeled Master Account.
   Note: *You may want to add the Group quickpick field to your screen, as well, in order to further identify the account.*

5. Drag the Master Account field into the tab on the Prospect Manager window, and place it above or beneath one of the existing fields.
   Note: *It is important to note your cursor's position as you drag this field, as it will be easier to place this field above or beneath another field rather than to the left or right of a field.*



6. Once the Master Account field is in position on the tab, release your mouse button.
   Result: *The Master Account field has been placed on the window.*

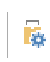
7. Click **Close** on the Customize window to close the window.

8. Click the **Save Current Window Settings** button  at the top right of the Account Manager window to save this arrangement as the new default look for your window.

9. Assign or change the Master Account of this client by clicking the plus sign button, located at the right of the Master Account field, and choosing a name from the list of accounts.
   Note: *Remove a Master Account by clicking the minus sign button, located to the right of the plus sign.*

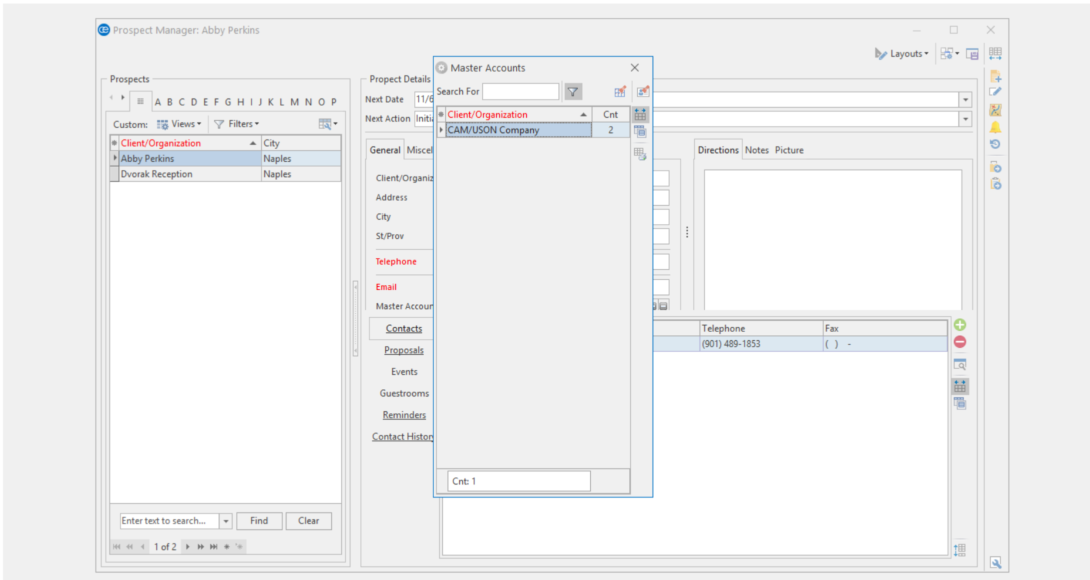
10. Click the **Save Changes** button , located at the top of your screen, in the **Home** ribbon tab.

Viewing Clients by Master Account

1. From Prospect Manager, click the **Master Accounts** button , located in your **Tools** menu (or in the toolbar on the right-hand side of your screen, depending on your personal configuration).
   Result: *The Master Accounts window opens.*

2. In the Master Accounts window, click on the specific Master Account you would like to review.
   Result: *The Account Manager screen lists only those clients associated with this Master Account. (As a default, the program will filter all records displayed in Account Manager to show only those belonging*

to the currently highlighted Master Account. If this is not the case, and no Master Account yet exists, no records will be displayed in the Master Accounts window.)
Note: *The Cnt (Count) field lists the number of accounts that are associated with the selected Master Account.*



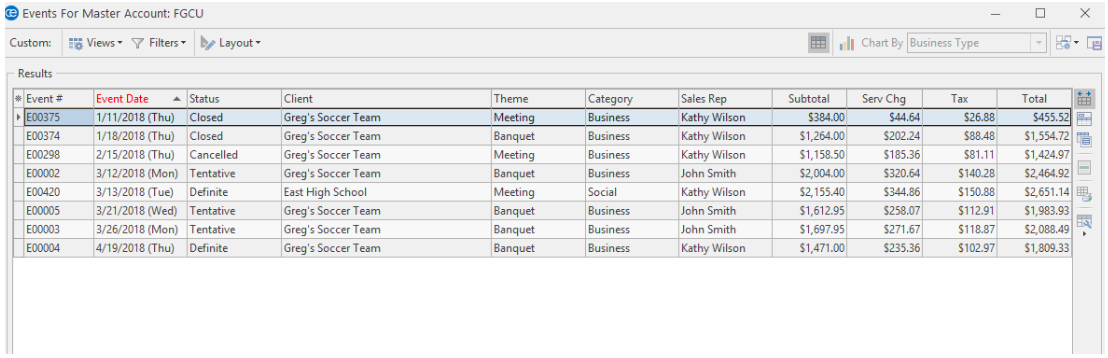
3. **[Optional]** Add accounts to an existing Master Account by clicking the **Set Filter** button, located to the right of the Search For field. Click on the account name, then drag into Master Accounts window. Drop into position beneath the name of the desired Master Account. This button acts as a toggle; clicking it again will filter out all accounts belonging to the currently highlighted Master Account.

Viewing Events or Contact People for All Clients of a Master Account

1. From Prospect Manager, click the **Master Accounts** button, located in your **Tools** menu (or in the toolbar on the right-hand side of your screen, depending on your personal configuration).

2. In the Master Accounts window, select the specific Master Account you would like to review.
Result: *By default, the Account Manager screen lists only those clients associated with this Master Account.*

3. Click the **View Booked Events** button or the **View Client Contacts** button, both located at the top right of the Master Accounts window.
Result: *A detail grid appears, listing all events or contact people for clients associated with that Master Account.*
Note: *As with all Caterease detail grids, tools here allow you to customize the grid, filter or sort the results, print or export grid details, send batch e-mails to all records in the grid, etc.*



Event #	Event Date	Status	Client	Theme	Category	Sales Rep	Subtotal	Serv Chg	Tax	Total
E00375	1/11/2018 (Thu)	Closed	Greg's Soccer Team	Meeting	Business	Kathy Wilson	$384.00	$44.64	$26.88	$455.52
E00374	1/18/2018 (Thu)	Closed	Greg's Soccer Team	Banquet	Business	Kathy Wilson	$1,264.00	$202.24	$88.48	$1,554.72
E00298	2/15/2018 (Thu)	Cancelled	Greg's Soccer Team	Meeting	Business	Kathy Wilson	$1,158.50	$185.36	$81.11	$1,424.97
E00002	3/12/2018 (Mon)	Tentative	Greg's Soccer Team	Banquet	Business	John Smith	$2,004.00	$320.64	$140.28	$2,464.92
E00420	3/13/2018 (Tue)	Definite	East High School	Meeting	Social	Kathy Wilson	$2,155.40	$344.86	$150.88	$2,651.14
E00005	3/21/2018 (Wed)	Tentative	Greg's Soccer Team	Banquet	Business	John Smith	$1,612.95	$258.07	$112.91	$1,983.93
E00003	3/26/2018 (Mon)	Tentative	Greg's Soccer Team	Banquet	Business	John Smith	$1,697.95	$271.67	$118.87	$2,088.49
E00004	4/19/2018 (Thu)	Definite	Greg's Soccer Team	Banquet	Business	Kathy Wilson	$1,471.00	$235.36	$102.97	$1,809.33

Unit 8: Importing a List of Prospects

In this section, you will learn:

Selecting Import Files and Options
Matching Prospect Manager Fields
Confirming Primary Import Data

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.

Step 1: Select Import Files and Options

1. From the **Tools** button, located on the **Home** ribbon tab in Prospect Manager, click the **Import Data Wizard** button from the drop-down list, or click the **Import Data Wizard** button from your toolbar at the bottom of your screen, depending on your personal configuration.
   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 adviser.*

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.

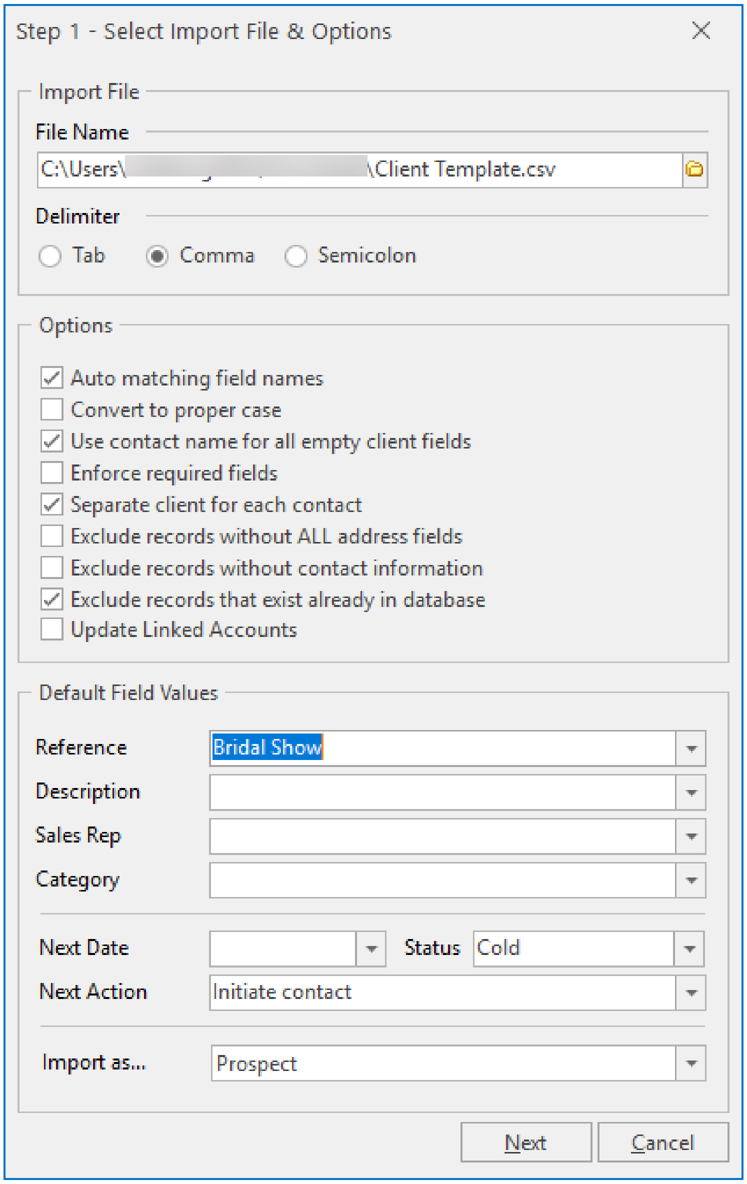
- **Exclude records without contact information**
  This option will not allow any records to be imported if they do not have contact people's names listed.

- **Exclude records that exist already in database**
  This option will not allow any records that already exist in Prospect Manager to be imported.

- **Update Linked Accounts**
  A "linked account" is one that has a matching Account ID with the matched field for Account ID in Caterease. When the **Update Linked Accounts** checkbox is clicked, all account fields will be updated upon import.

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*.

7. Click **Next.**
   Result: *You are taken to Step 2: Match Fields.*

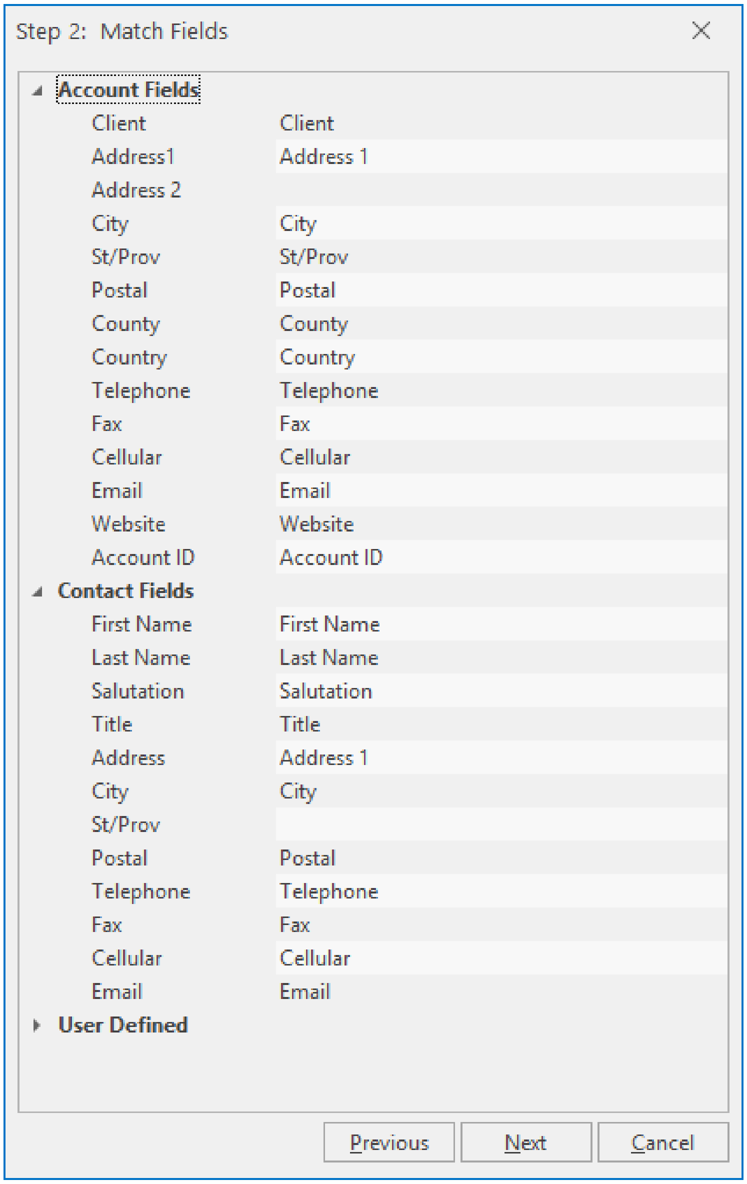


Step 2: Match Fields

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 expand button to the left of Contact Fields, Event Fields, Financial Fields, and Miscellaneous fields to view subcategories.*

3. Click **Next**.



Step 3: Confirm Primary Import Data

1. Review data to be imported.
   Note*: You can click the expand button 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.

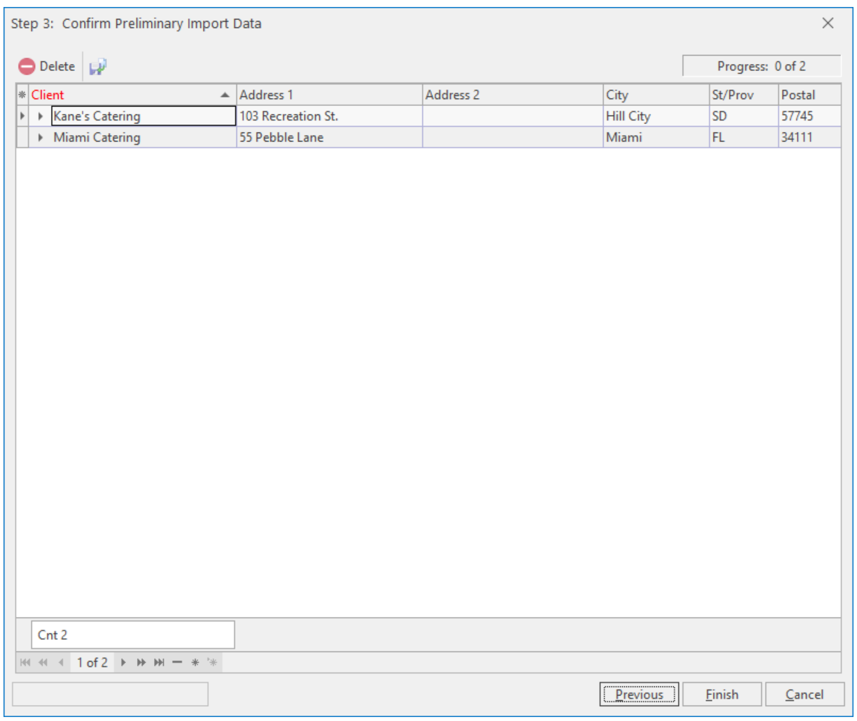
2. **[Optional]** Click in any field on the grid and edit as desired prior to importing into Caterease.

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.
   ***Result:** A confirmation prompt appears.*

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



Unit 9: Searching for Prospects

In this section, you will learn:

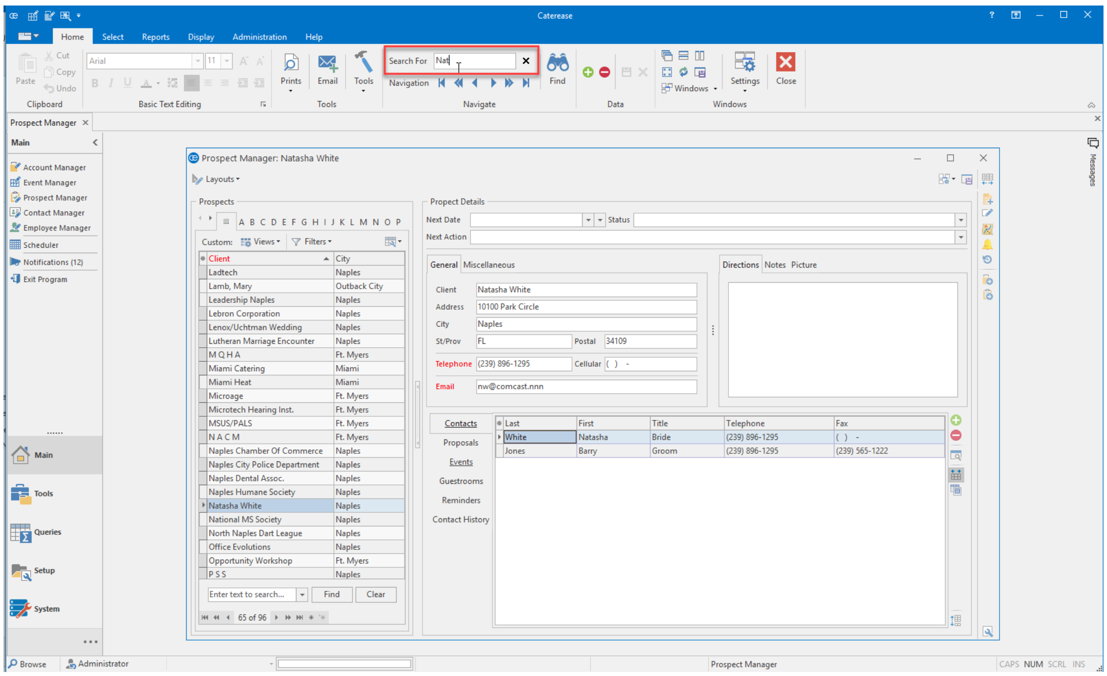
Searching Incrementally by Prospect Name
Sorting and Searching Incrementally by Other Details
Fields Available in Prospect Manager
Using the Prospect Finder Tool

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.

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 , located 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.*

Fields Available in Prospect Manager

You can quickly and easily customize your Prospect screen in Prospect Manager by creating quickpick lists and customizing the grid. Fields can be added, removed or rearranged - and entire layouts can be changed so that different sections of information appear.

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."
Booked	Allows you to track the date on which an event was booked.

Field	Description
Revised	Allows you to track the date on which an event was revised.
Site Name	Allows you to track the off-premise site location for an account.
Site Address/ City/ St/ Province/Postal	Allows you to track the off-premise address details for an account.
Sales Rep**	Identifies a sales representative linked to the customer.
Tax Exempt**	Allows you to designate every future event for this customer as tax exempt.
Exempt #**	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.
On 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.
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.
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.
Next Date	Allows you to view (and edit, if necessary) the date a next action has been set for.
Next Action	Offers a custom quickpick list of planned actions (Initiate Contact, Send Brochure, Schedule Tasting, etc.).
Status	Offers a custom quickpick list of account statuses (Hot, Cold, Warm, etc.).
Account	Displays a checkbox to indicate if a the client is a prospect (no events have been booked) or an account.
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 company.
** Displayed on the General tab by default.* *** Displayed on the Miscellaneous tab by default*	

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 list to the right of the field.*

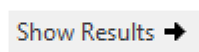
2. In the Search Rules field, select the appropriate rule.
   Note: *Confirm that "Ignore Case" is selected if you do not want to worry about capitalization.*

   - **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.

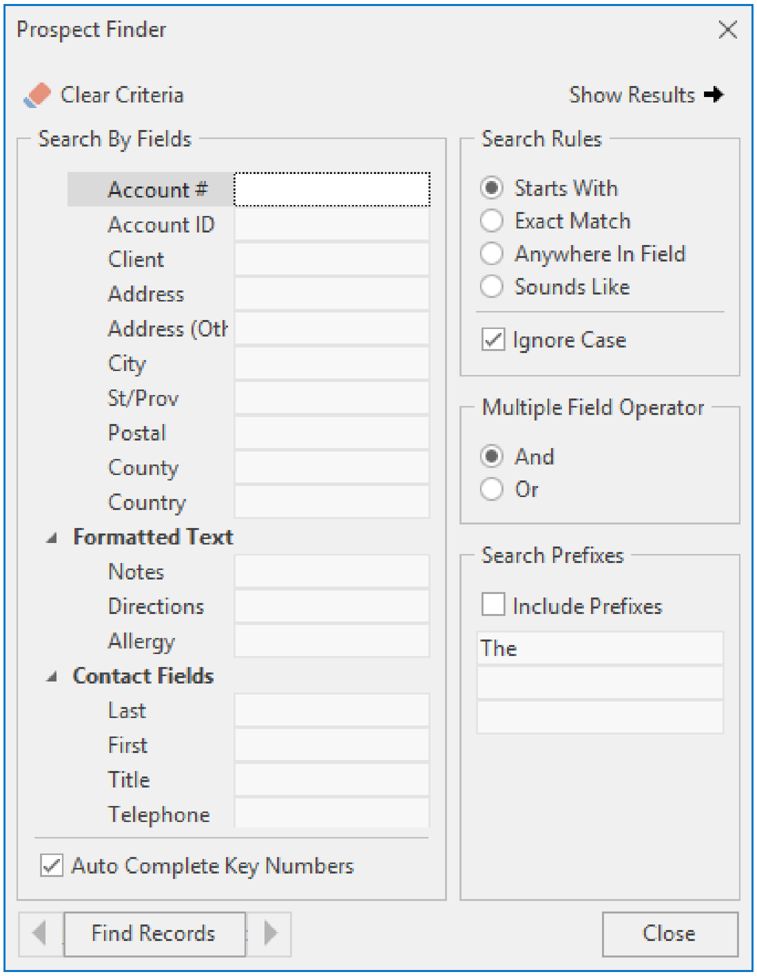
5. Click the **Find Records** button, located at the bottom of the window.

6. **[Optional]** Click the **Show Results/Hide Results** button 

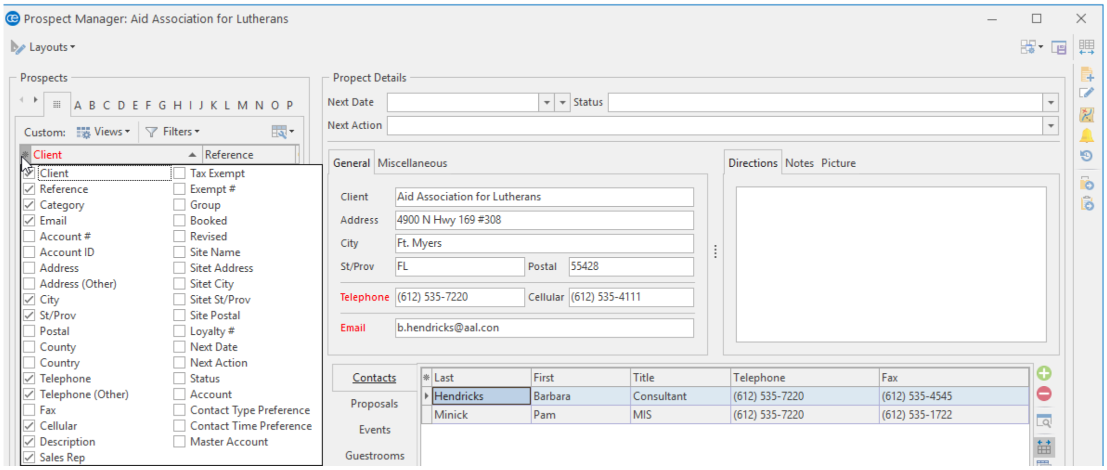
, at the top right of the Finder, to display a list of all records your search has found thus far.
   Note: *Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Prospect Finder tool down.*

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.*



9. Optionally customize the fields that appear in the Prospect Finder tool by clicking the quick-column customizing button to the left of the Client field and dragging and dropping desired fields into position.
   Result: *The first ten (10) fields will display in the Finder tool.*



Unit 10: Querying Your Prospective Customers

In this section, you will learn:

Running a Custom Query of Your Prospects
Sending Batch E-mails from Prospect Manager
Printing a Query Detail Grid
Tracking Proposal Activity

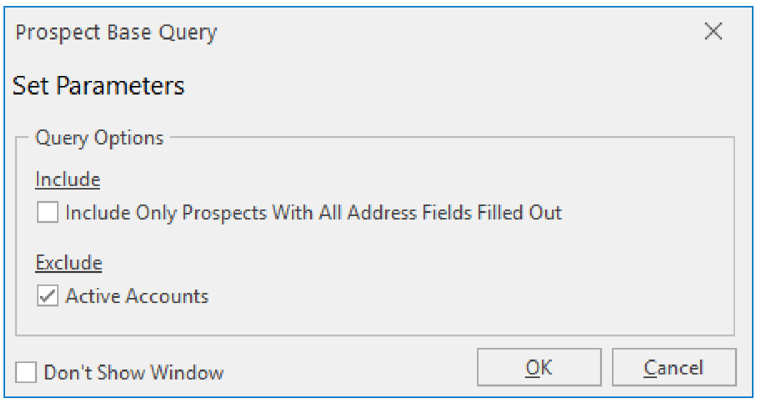
Querying Your Prospective Customers

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.

Running a Custom Query of Your Prospects

1. Click the **Queries** sidebar.

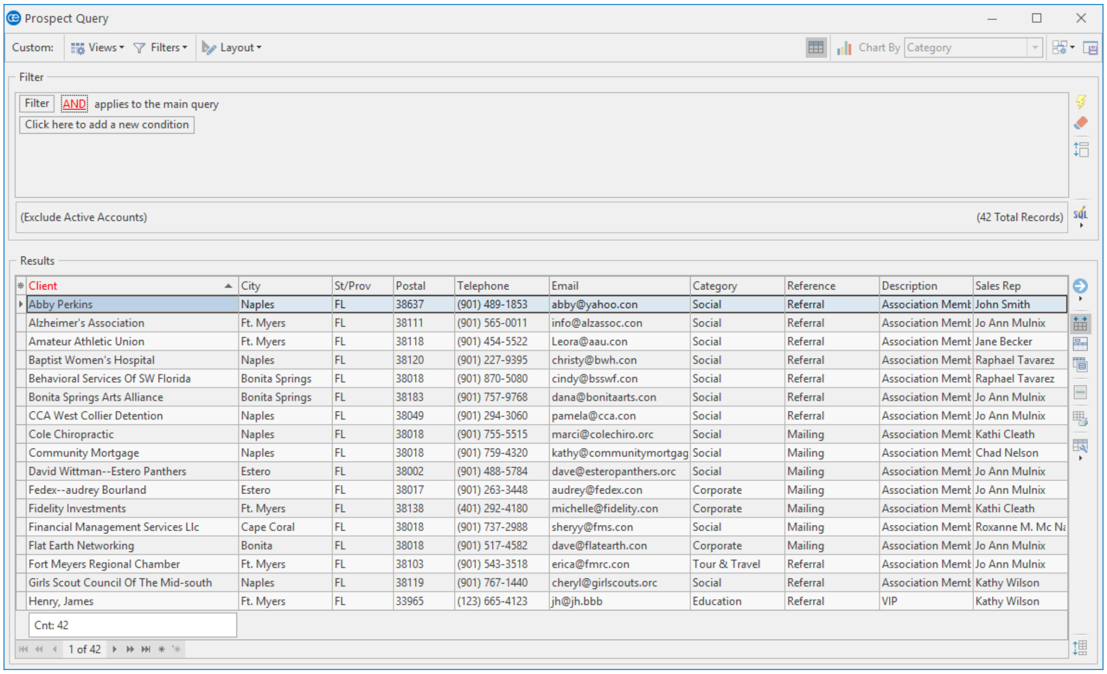
2. Click the **Prospect Query** button.
   Result: *The Prospect Base Query window opens.*



3. Click the checkbox under **Include** if you would like to query only prospects with all address fields completed.

4. Click the checkbox under **Exclude** if you would like to exclude active accounts.

5. Click **OK**.
   Result: *The Prospect Query search results display.*



Client	City	St/Prov	Postal	Telephone	Email	Category	Reference	Description	Sales Rep
Abby Perkins	Naples	FL	38637	(901) 489-1853	abby@yahoo.con	Social	Referral	Association Memt	John Smith
Alzheimer's Association	Ft. Myers	FL	38111	(901) 565-0011	info@alzassoc.con	Social	Referral	Association Memt	Jo Ann Mulnix
Amateur Athletic Union	Ft. Myers	FL	38118	(901) 454-5522	Leora@aau.con	Social	Referral	Association Memt	Jane Becker
Baptist Women's Hospital	Naples	FL	38120	(901) 227-9395	christy@bwh.con	Social	Referral	Association Memt	Raphael Tavarez
Behavioral Services Of SW Florida	Bonita Springs	FL	38018	(901) 870-5080	cindy@bsswf.con	Social	Referral	Association Memt	Raphael Tavarez
Bonita Springs Arts Alliance	Bonita Springs	FL	38183	(901) 757-9768	dana@bonitaarts.con	Social	Referral	Association Memt	Jo Ann Mulnix
CCA West Collier Detention	Naples	FL	38049	(901) 294-3060	pamela@cca.con	Social	Referral	Association Memt	Jo Ann Mulnix
Cole Chiropractic	Naples	FL	38018	(901) 755-5515	marci@colechiro.orc	Social	Mailing	Association Memt	Kathi Cleath
Community Mortgage	Naples	FL	38018	(901) 759-4320	kathy@communitymortgag	Social	Mailing	Association Memt	Chad Nelson
David Wittman--Estero Panthers	Estero	FL	38002	(901) 488-5784	dave@esteropanthers.orc	Social	Mailing	Association Memt	Jo Ann Mulnix
Fedex--audrey Bourland	Estero	FL	38017	(901) 263-3448	audrey@fedex.con	Corporate	Mailing	Association Memt	Jo Ann Mulnix
Fidelity Investments	Ft. Myers	FL	38138	(401) 292-4180	michelle@fidelity.con	Corporate	Mailing	Association Memt	Kathi Cleath
Financial Management Services Llc	Cape Coral	FL	38018	(901) 737-2988	sheryy@fms.con	Social	Mailing	Association Memt	Roxanne M. Mc Na
Flat Earth Networking	Bonita	FL	38018	(901) 517-4582	dave@flatearth.con	Corporate	Mailing	Association Memt	Jo Ann Mulnix
Fort Meyers Regional Chamber	Ft. Myers	FL	38103	(901) 543-3518	erica@fmrc.con	Tour & Travel	Referral	Association Memt	Jo Ann Mulnix
Girls Scout Council Of The Mid-south	Naples	FL	38119	(901) 767-1440	cheryl@girlscouts.orc	Social	Referral	Association Memt	Kathy Wilson
Henry, James	Ft. Myers	FL	33965	(123) 665-4123	jh@jh.bbb	Education	Referral	VIP	Kathy Wilson

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, 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. Generate a Prospect Query as described above.

2. From the result grid, 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 on the account at the end of your desired range.
   Note: *Holding your **[Ctrl]** key and the **[A]** key down at the same time will select all prospective and active accounts in the grid.*

3. 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.*

4. 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.

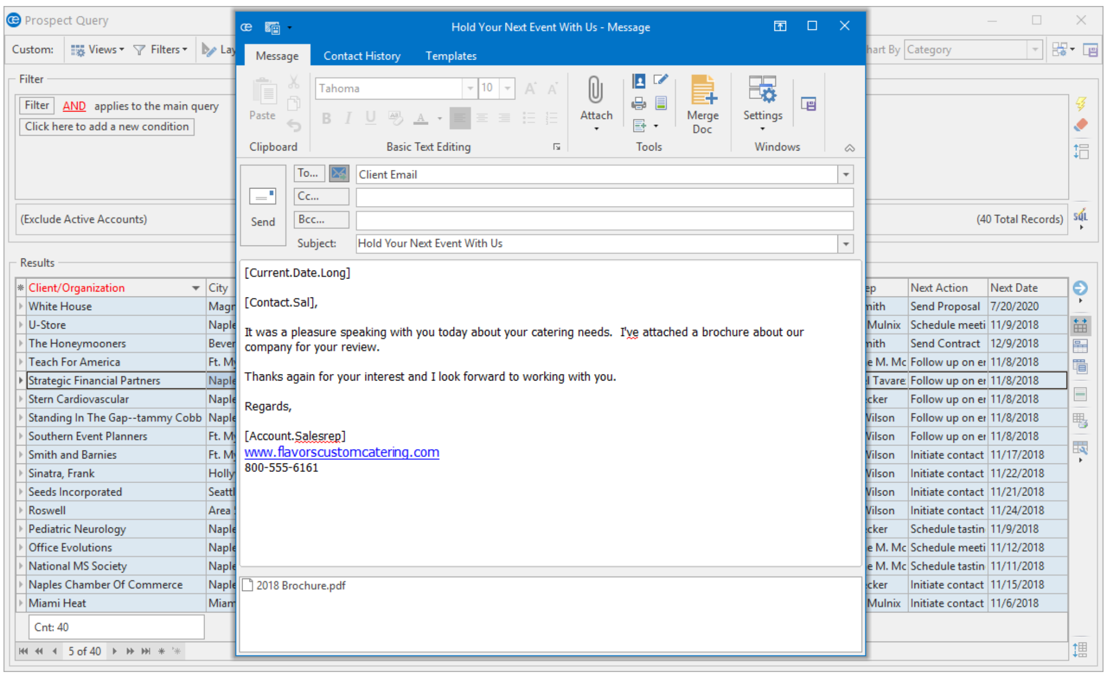
5. Click into the large white text block in the window and type a message as the body of your e-mail.

6. **[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.)*
   Result: *A confirmation prompt displays. Click* ***Yes*** *to replace the existing text.*

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

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

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



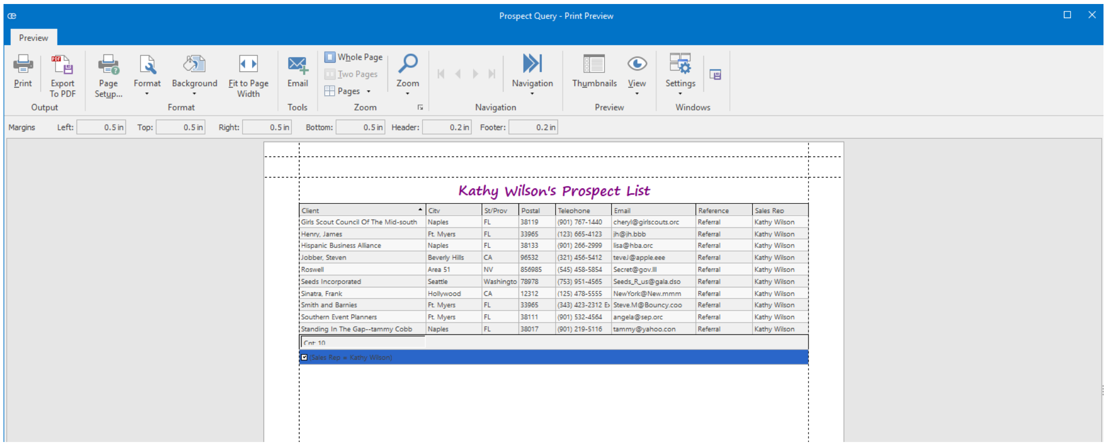
Printing a Query Grid

1. Generate a Prospect Query or other query as described above.

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

3. **[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.

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



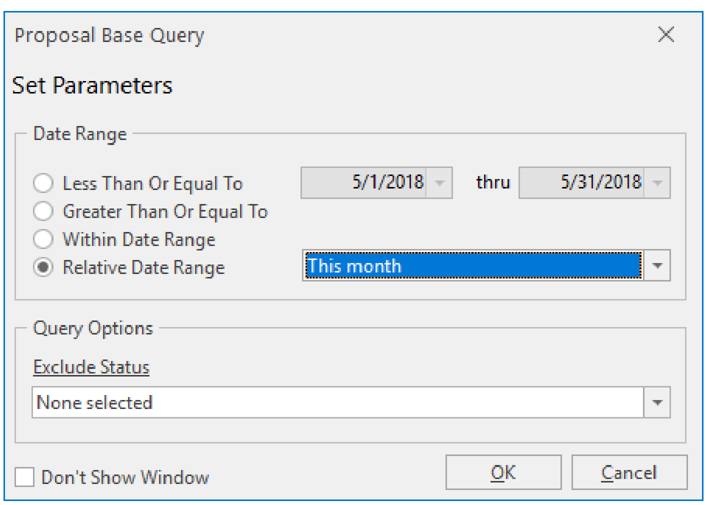
Tracking Proposal Activity

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.

1. Click the **Queries** sidebar and choose **Proposal Query**.
   Result: *The Proposal Base Query window opens.*

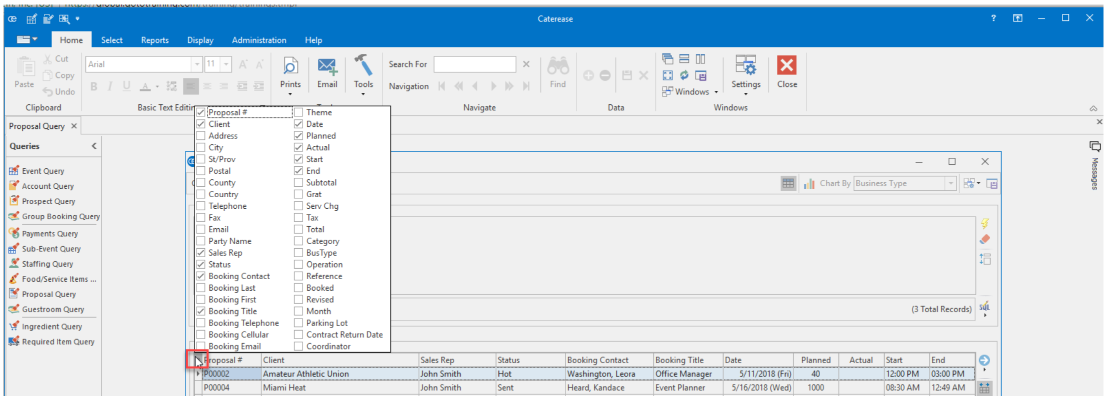
2. Set a **Date Range** for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.

3. Click **OK**.
   Result*: The Proposal 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.*