

TRAINING GUIDE



800.863.1616

PO Box 7459, Naples, FL 34101

www.caterease.com



Managing Your Reminders and Contact History in Contact Manager

TABLE OF CONTENTS

Unit 1: Finding an Account in Contact Manager	5
Using the Navigation Bar	6
Searching Incrementally As You Type	7
Using the Account Finder Tool	7
Unit 2: Creating New Reminders and Contact History Notes	10
Creating a New Reminder from Contact Manager	11
Creating Automatic Reminders from Contact Manager	14
Inserting Dynamic Merge Fields into an Auto-Reminder Message	17
Creating a New Contact History Note from Contact Manager	20
Creating a New Reminder from Event Manager	22
Creating a New Automatic Reminder from Event Manager	25
Adding a New Contact History Note in Event Manager	28
Unit 3: Managing Active Reminders and Contact History Notes	30
Using the Active Reminders Tool	31
Snoozing a Reminder	32
Dismissing a Reminder	32
Retrieving Linked Reminders into a Manager	34
Viewing and Editing Reminders	36
Viewing Reminders in the Scheduler	37
Exporting/Synchronizing a Single Reminder in Outlook	38
Exporting/Synchronizing Multiple Reminders in Outlook	38
Deleting an Individual Reminder	40
Deleting all Inactive Reminders	40
Automatically Deleting all Inactive Reminders	41

TABLE OF CONTENTS

Unit 4: Printing and E-mailing from Contact Manager	43
Printing a Letter or Document from Contact Manager	44
Editing a Merge Letter or Document On-the-Fly	45
Printing Reminder Lists	47
Printing Reminders for One Account	47
Printing All Reminders for a Day or Date Range	48
Printing Contact History for One Account	50
Sending an E-mail from Contact Manager	53
Viewing Sent E-mails from Contact Manager	54
Re-sending an E-mail from Contact Manager	55
Unit 5: Customizing Your Contact Manager	57
Adding Quickpick List Items to the Reminder Category Field	58
Adding Quickpick Items to the History Category Field	60
Modifying Existing Quickpick Items	61
Rearranging Existing Quickpick Items	61
Stretching the Grid Pane	62
Manipulating the Grid	62

Unit 1: Finding an Account in Contact Manager

In this section, you will learn:

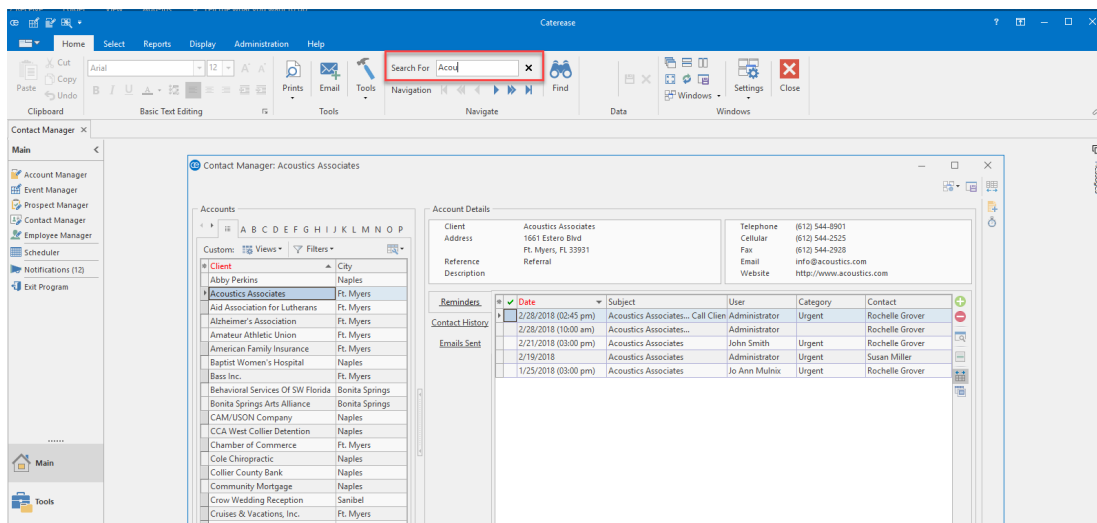
- Using the Search For Tool
- Using the Navigation Bar
- Searching Incrementally as you Type
- Searching via the Account Finder Tool

Unit 1: Finding an Account in Contact Manager




Finding an Account in Contact Manager

It is easy to search for a customer in the Contact Manager. Whether you'd like to scroll forward and backward from account to account, whether you'd like to search by name, or whether you prefer to use a variety of search rules and criteria, the Contact Manager Search Tools are fast and user-friendly.




1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** sidebar group on the left-hand side of your screen.
2. Start typing a client name into the **Search For** field, located at the top of the screen, and the program will automatically scroll you to the matching account for the text you type.

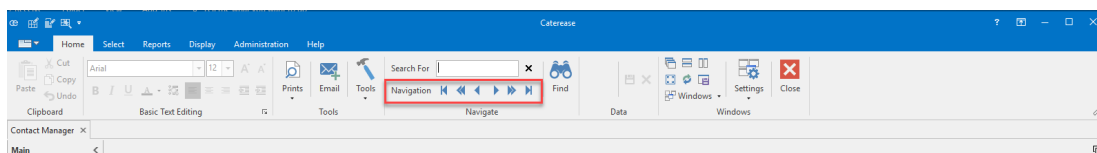


Using the Navigation Bar


1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** sidebar group on the left-hand side of your screen.
2. Click the **Next** arrow , located in the **Navigation** area at the top of your screen, to move forward to the next event.
3. Click the **Prior** arrow  to move to the previous event.
4. Click the **Next Page** arrow  to move forward to the bottom of the Detail Grid view.

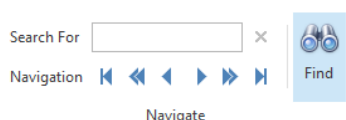
Note: Click the **Display Full Grid** button , located on the upper right-hand side of the window, to view the records in grid format. For more information, see the topic below.


5. Click the **Prior Page** arrow  to move back to the previous page of the Detail Grid view.
6. Click the **Last** arrow  to move to the last customer in the Detail Grid view.
7. Click the **First** arrow  to move to the first customer in the Detail Grid view.



Searching Incrementally As You Type

1. Click the **Display Full Grid** button , located on the upper right-hand side of your Contact Manager window.
Result: The Contact Manager switches to showing MANY contacts listed in a grid.
Note: This button acts as a toggle; you will click 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, (City, Client, Status, etc.), in ascending order.
Note: Click on the column heading once more to sort in descending order.
3. Click into 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 events 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 Contact Manager display back to "form" mode.
Result: Your Contact Manager will display the contact you have found.

Using the Account Finder Tool

What if you are searching for a customer but only remember the name of the contact person? Or what if you only remember the account begins with the letter A? The Account Finder Tool will allow you to search for that account, using a variety of search rules and criteria.

1. From your main screen in Contact Manager, click the **Find** button (binoculars), located on the **Home** ribbon tab.

Result: *The Account Finder window opens.*

2. In the **Search By Fields** area, type the text you would like to search for into the fields provided.

Note: *You may search by more than one field. Many fields have a corresponding drop-down list of quickpick options from which to choose.*



3. In the Search Rules field, select the appropriate rule.

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

Note: *Confirm "Ignore Case" is selected if you want to forego capitalizing the first letter of the entry.*

4. **[Optional]** Click the radio button next to And or Or, in the **Multiple Field Operator** section, if you are searching by multiple search criteria.
5. **[Optional]** Click into the Include Prefixes checkbox, in the **Search Prefixes** area, if you would like to include prefixes in your search. Type the prefixes (such as a, an, or the) into the Prefix fields provided.
6. Click the **Find Records** button, located at the bottom left-hand side of the window.

7. Click the **Show Results/Hide Results** button at the top of the Account Finder tool to display a list of all records your search has found thus far.

Note: *If you accidentally skip over the record you want (and you do not have the Show Results screen open), click the **Prior Match** button  , on the lower left-hand side of the window, to search backward through the records you have found; click the **Next Match** button  to move forward.*

Tip: Click the **Clear Criteria** button (located at the upper left-hand side of the window), after you have run a search, to clear all results and begin again.

8. Once your record is located, click **Close**.

The screenshot shows the 'Account Finder' dialog box. It has a title bar with a close button (X). Inside, there's a 'Clear Criteria' button with a red diamond icon and a 'Show Results' button with a right arrow icon. The main area is divided into two columns. The left column is titled 'Search By Fields' and contains a list of fields: Account #, Account ID, Client (highlighted), Address, Address (Other), City, St/Prov, Postal, County, Country, Formatted Text (with sub-fields Notes, Directions, Allergy), and Contact Fields (with sub-fields Last, First, Title, Telephone). Each field has a corresponding text input box. The 'Client' field contains the text 'Sunset'. Below the fields is a checkbox labeled 'Auto Complete Key Numbers' which is checked. The right column is titled 'Search Rules' and contains four radio buttons: 'Starts With' (selected), 'Exact Match', 'Anywhere In Field', and 'Sounds Like'. Below these is a checkbox labeled 'Ignore Case' which is checked. Further down is a section titled 'Multiple Field Operator' with two radio buttons: 'And' (selected) and 'Or'. At the bottom of the right column is a section titled 'Search Prefixes' with a checkbox labeled 'Include Prefixes' which is checked, and a text input box containing the word 'The'. At the bottom of the dialog are two buttons: 'Find Records' (with left and right arrow icons) and 'Close'.

Account Finder

Clear Criteria Show Results →

Search By Fields

Account #
Account ID
Client Sunset
Address
Address (Other)
City
St/Prov
Postal
County
Country

Formatted Text

Notes
Directions
Allergy

Contact Fields

Last
First
Title
Telephone

☒ Auto Complete Key Numbers

Search Rules

☒ Starts With
☐ Exact Match
☐ Anywhere In Field
☐ Sounds Like

☒ Ignore Case

Multiple Field Operator

☒ And
☐ Or

Search Prefixes

☒ Include Prefixes
The

Find Records Close

Unit 2: Creating New Reminders and Contact History Notes

In this section, you will learn:

- Creating a New Reminder from Contact Manager
- Creating Automatic Reminders from Contact Manager
- Inserting Dynamic Merge Fields into an Auto-Reminder Message
- Creating a New Contact History Note from Contact Manager
- Creating a New Reminder from Event Manager
- Creating Automatic Reminders from Event Manager
- Creating a New Contact History Note from Event Manager

Unit 2: Creating New Reminders and Contact History Notes

Creating a New Reminder from Contact Manager

Contact Manager lets you keep track of all contact you have had with your clients. You can create reminders to yourself or others that will pop up on your screen and remind you to complete a task. Contact Manager features are interwoven throughout the entire Caterease program; however, the Contact Manager gives you a clean, easy way to manage all of this data quickly.

Creating a New Reminder from Contact Manager

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** sidebar group, located on the left-hand side of your screen.
2. Click the **Reminders** tab, located towards the upper middle area of your screen, if it is not already selected.

3. Click the **New Reminder** button , located on the upper right-hand side of the screen.

Result: The Reminder window opens.

4. 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.
See Unit 5 for information about managing your quickpick lists.
 - **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 (Business, Personal, etc.), by selecting from the dropdown list of available 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.
 - **All Day Event** -- Click into this checkbox if the event is to last the entire day. (Selecting this option will remove the Start and End times from the window.)
 - **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.

- **Show Time As:** Optionally select an option from the drop-down list (Free; Tentative; Busy; Out of Office).
- **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 of options.
- **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 link the reminder to another event.
- **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list (**Quickpicks > Contact Manager > Reminder Category**).
- **User** -- This is the person to be reminded. Accept the default name or click the down arrow at the right of the field and choose from the drop-down list of options.
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.

Tip: Set up your Scratch Pad notes from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.

Reminder:

Subject

Sunset Technologies...

Location

Label

☐ None

Start

3/5/2018

12:25 PM

☐ All day event

End

3/5/2018

12:30 PM

☒ Reminder Active

20 minutes

Show time as

☒ Busy

Client

Sunset Technologies

Contact

Bland, Craig

Link

Event #: E00249

Category

Confirmation

User

Kathy Wilson

Message

Call to confirm guest count.

OK

Cancel

Creating Automatic Reminders from Contact Manager

Imagine it is your company's protocol to call a customer two days prior to their event to confirm their guest count. You can create an automatic reminder in Caterease so that whenever you book a new event, a reminder will automatically be generated and will pop up on your screen two days prior to the event date of that new party. What's more, Caterease allows you to create merge fields to dynamically merge specific details into your automatic reminder.

Automatic reminders can also be linked to booked dates or revised dates, and can even be triggered by you or another user modifying an existing event, as opposed to just adding a new one. Basically, if you have a few standard duties that you perform routinely for every event, you can have Caterease automatically remind you.

Creating Automatic Reminders from Contact Manager

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** sidebar group on the left-hand side of your screen.

2. Click the **Automatic Reminders** button , located in the toolbar on the right-hand side of your screen.

Result: The Automatic Reminders window opens.

Note: You may also access this feature from **Tools > Automatic Reminders Setup**.

3. Click the **Add New Auto-Reminder** button , located at the top right-hand side of the window.

Result: The Set Auto Reminder window opens.

Set Auto Reminder

Setup

Create a new reminder when the following event occurs

A New Event Is Booked

Set the reminder date for ... 1 Week(s)

... Before the Event Date

Set the reminder for ... 15 minutes

... prior to the time of 02:10 PM

Reminder Detail

Subject: Auto Reminder

Location: Email

Label: ☐ None

Category: General Follow-Up

Contact: Booking Contact

Options

☒ Confirm when created

☒ Specific user: Kathy Wilson

Message

OK Cancel

4. Click the down arrow at the right of the first field and select from the following options:

Create a new reminder when the following event occurs:

- A New Event is Booked
- An Existing Event is Changed
- A Deposit is Scheduled

5. Click the days, weeks, or months drop-down list to determine the span of time the program should use to set the automatic reminder (i.e., a certain number of days, weeks, or months before or after the event date, booked date, or revised date).
6. Enter a number of days, weeks, or months, and select a date to have the automatic reminder linked to.
7. Click the down arrow to indicate whether the number of days you selected is to occur before or after the reminder date and time.
8. Click the down arrow to indicate whether the reminder pertains to Event Date, Booked Date, or Revised Date.
9. **[Optional]** Click the down arrow next to **Set the reminder for**, and select the number of minutes or hours prior to the reminder time you would like the reminder to display.
***Note:** This entry will not control what time you see this reminder; it will merely display to inform you what time the reminder is due to be responded to.*
10. **[Optional]** Complete the following information in the Reminder Detail fields.
 - **Subject** -- Type a **Subject** for this auto-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 the desired label from the drop-down list of options.
 - **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list. Category examples might include "Urgent," "Follow-up," etc.
 - **Contact** -- This is the contact person at the company to which this auto-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).
11. **[Optional]** Click into the checkbox next to **Confirm when created** to enable these settings.
***Note:** "Confirm when created" sets the program to prompt you whenever this automatic reminder is created for an event.*
12. **[Optional]** Click into the checkbox next to **Specific User** and click the down arrow to assign this auto-matic reminder to a particular user.
***Note:** If this option is not selected, the automatic reminder will be assigned to whichever user triggers it (i.e., the user who adds or modifies then event and causes the reminder to be created).*
13. Type the text of your reminder into the **Message** box, or insert merge fields to dynamically merge information into the reminder.
14. When finished, click **OK**.

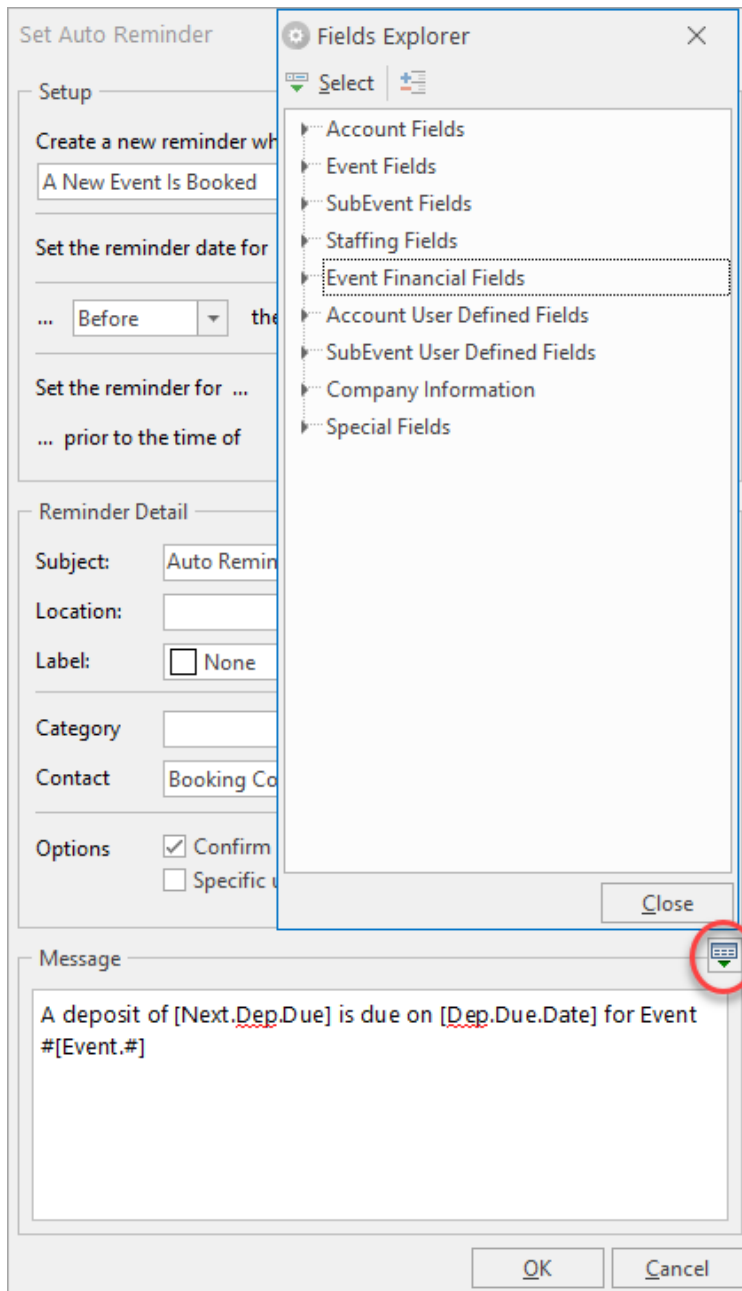
Inserting Dynamic Merge Fields into an Auto-Reminder Message

You can create custom auto-reminders which dynamically merge information from the event, such as the event number, revised date, etc.

Inserting Dynamic Merge Fields into an Auto-Reminder Message


1. From the Set Auto Reminder window, click into the **Message** text block and start typing the body of the message.

2. Click the **Insert Merge Fields** button , located at the top right-hand side of the **Message** text block.
Result: *The Fields Explorer window opens.*



3. Click the expand button to the left of the group of merge fields you want to access.

Result: The selected group expands, showing all related merge fields.

Note: As an option, click the **Full Expand** button  to expand all categories of merge fields at once.


4. Select a field and insert it in one of the following ways:

- Double-click the selected field to drop it in the current cursor position (where your cursor currently resides).
 - Hold your left mouse button down on the desired field, drag it into any position in **Message** block, and release.
 - Click the **Select** button to drop the field into the current cursor position.
5. Continue typing text and inserting merge fields as desired.
Result: *The selected field is inserted, inside brackets, into the **Message** text block.*
 6. When finished, click **Close**.
Result: *The Fields Explorer window closes and the Set Auto Reminder window remains open.*
 7. Click **OK** on the Set Auto Reminder window to close the window.

Creating a New Contact History Note from Contact Manager

You can use Contact History Notes to keep track of conversations and tasks pertaining to clients or events. When you take a phone call, edit an event, etc., you can quickly log that occurrence in a Contact History Note, which will automatically be stamped with the current date and time.

Creating a New Contact History Note from Contact Manager

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** sidebar group, located on the left-hand side of your screen.
2. Search for and select the contact for whom you would like to add a contact history note.
3. Click the **Contact History** tab, located at the bottom of the Contact Manager screen.
4. Click the **New Contact Item** button , located towards the upper middle area of your screen.
Result: *The Contact Item window opens.*
5. Type a subject into the Subject field, or select a subject from the drop-down quickpick list (**Quickpicks > Contact Manager > History Subject**).
6. 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.*
7. 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.*
8. 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 (**Quickpicks > Contact Manager > History Category**).
 - **User** -- This is the person who performed the task to which this contact history note refers. Accept the default name or click the down arrow at the right of the field and choose from drop-down list of options.
 - **Contact** -- Click the down arrow to the right of the Contact field and select an existing contact or add a new contact.
9. Type the Contact History action into the **Comment** text block.

Note: You may also access the Scratch Pad  to insert pre-formatted text.

Tip: Set up your Scratch Pad notes from the **Administration** ribbon tab > **Lists > Scratch Pad**.

10. When finished, click **OK**.

The screenshot shows a 'History' dialog box with the following fields and content:

- Subject:** Crow Wedding Reception...
- Date:** 3/14/2018
- Time:** 10:24 AM
- Category:** Phone - Incoming
- User:** Jo Ann Mulnix
- Contact:** Crow, Michelle
- Comment:** Michelle called to change the billing address.
- Link to Event:** E00111
- Buttons:** OK, Cancel

Creating a New Reminder from Event Manager

If you own the Caterease Contact Manager add-in, you can create reminders directly from Event Manager; there is no need to open your Contact Manager.

Creating a New Reminder from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** sidebar group located on the left-hand side of your screen.
2. Click the **New Reminder** button  , located in the toolbar on the right-hand side of your screen (or access this tool from your **Tools** menu, located in the **Home** ribbon tab at the top of your screen, depending on your personal configuration).
Result: *The Reminder window opens.*
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 (Business, Personal, etc.), by selecting 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.*
 - **All Day Event** -- Click into this checkbox if the event is to last the entire day. (Selecting this option will remove the Start and End times from the window.)
 - **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.
 - **Show Time As:** Optionally select an option from the drop-down list (Free; Tentative; Busy; Out of Office).
 - **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.

- **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 link the reminder to another event.
- **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list (**Quickpicks > Contact History > Reminder Category**).
- **User** -- This is the person to be reminded. Accept the default name or click the down arrow at the right of the field and choose from the drop-down list of options.

Note: Select **Everyone** if you would like the reminder to be seen by all users.

Reminder:

Subject: Sunset Technologies...

Location: Label: None

Start: 3/5/2018 12:25 PM All day event

End: 3/5/2018 12:30 PM

☒ Reminder Active 20 minutes Show time as: Busy

Client: Sunset Technologies

Contact: Bland, Craig Link: Event #: E00249

Category: Confirmation

User: Kathy Wilson

Message: Call to confirm guest count.

OK Cancel

4. 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.

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

Result: *The window closes and the reminder has been created.*

Tip: Set up your Scratch Pad notes from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.

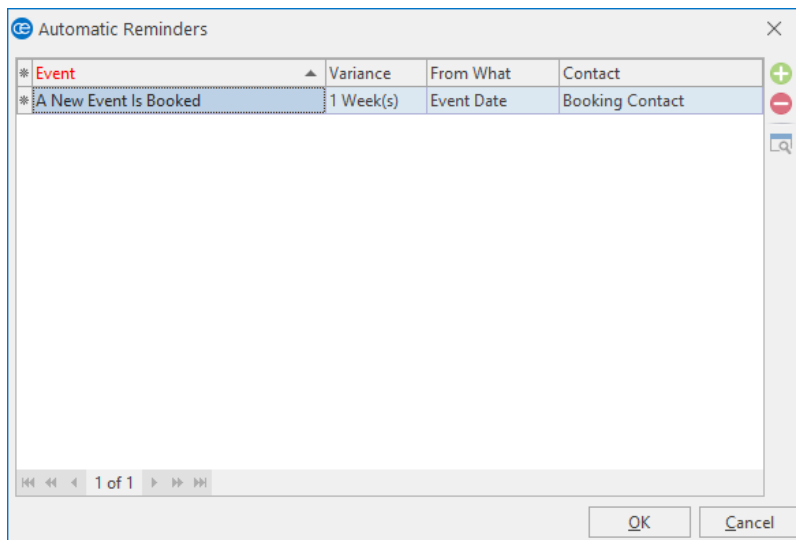
Creating Automatic Reminders from Event Manager


If you own the Contact Manager add-in, you can create automatic reminders that will pop up on your screen in Event Manager on a certain date to remind you to complete a task. These reminders can be linked to event dates, booked dates, or revised dates.

Creating a New Automatic Reminder from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** sidebar group located on the left-hand side of your screen.
2. Click the **Administration** ribbon tab at the top of the screen.
3. Click the **Options** button and select **Automatic Reminders Setup**.

Result: The Automatic Reminders window opens.



4. Click the **Add New Auto-Reminder** button , located at the top right-hand side of the window.
Result: The Set Auto Reminder window opens.

Set Auto Reminder

Setup

Create a new reminder when the following event occurs

A New Event Is Booked

Set the reminder date for ... 1 Week(s)

... Before the Event Date

Set the reminder for ... 15 minutes

... prior to the time of 02:10 PM

Reminder Detail

Subject: Auto Reminder

Location: Email

Label: ☐ None

Category: General Follow-Up

Contact: Booking Contact

Options

☒ Confirm when created

☒ Specific user: Kathy Wilson

Message

OK Cancel

5. Click the down arrow at the right of the first field on this screen and choose an action to trigger the creation of the reminder.

Create a new reminder when the following event occurs:


- A New Event is Booked
- An Existing Event is Changed
- A Deposit is Scheduled

6. Click the days, weeks, or months drop-down list to determine the span of time the program should use to set the automatic reminder (e.g., a certain number of days, weeks, or months before or after the event date, booked date, or revised date).
7. Enter a number of days, weeks, or months, and select a date to have the automatic reminder linked to.
8. Click the down arrow to indicate whether the number of days you selected is to occur before or after the reminder date and time.
9. Click the down arrow to indicate whether the reminder pertains to Event Date, Booked Date, or Revised Date.
10. **[Optional]** Click the down arrow next to **Set the reminder for**, and select the number of minutes or hours prior to the reminder time you would like the reminder to display.
***Note:** This entry will not control what time you see this reminder; it will merely display to inform you what time the reminder is due to be responded to.*
11. **[Optional]** Complete the following information in the Reminder Detail fields.
 - **Subject** -- Type a Subject for this auto-reminder, or click the down arrow to the right of the field to select items from a drop-down quickpick list. (See Unit 5 for information about managing your quickpick lists.)
 - **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 (Business, Personal, etc.), by selecting the desired label from the drop-down list of options.
 - **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list. Category examples might include "Urgent," "Follow-up," etc.
 - **Contact** -- This is the contact person at the company to which this auto-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).
12. **[Optional]** Click into the checkbox next to **Confirm when created** to enable these settings.
***Note:** "Confirm when created" sets the program to prompt you whenever this automatic reminder is created for an event.*
13. **[Optional]** Click into the checkbox next to **Specific User** and click the down arrow to assign this auto-reminder to a particular user.
***Note:** If this option is not selected, the automatic reminder will be assigned to whichever user triggers it; meaning the user who adds or modifies the event and causes the reminder to be created.*
14. Type the text of your reminder into the **Message** box, or insert merge fields to dynamically merge information into the reminder. (See the section below.)
15. When finished, click **OK**.

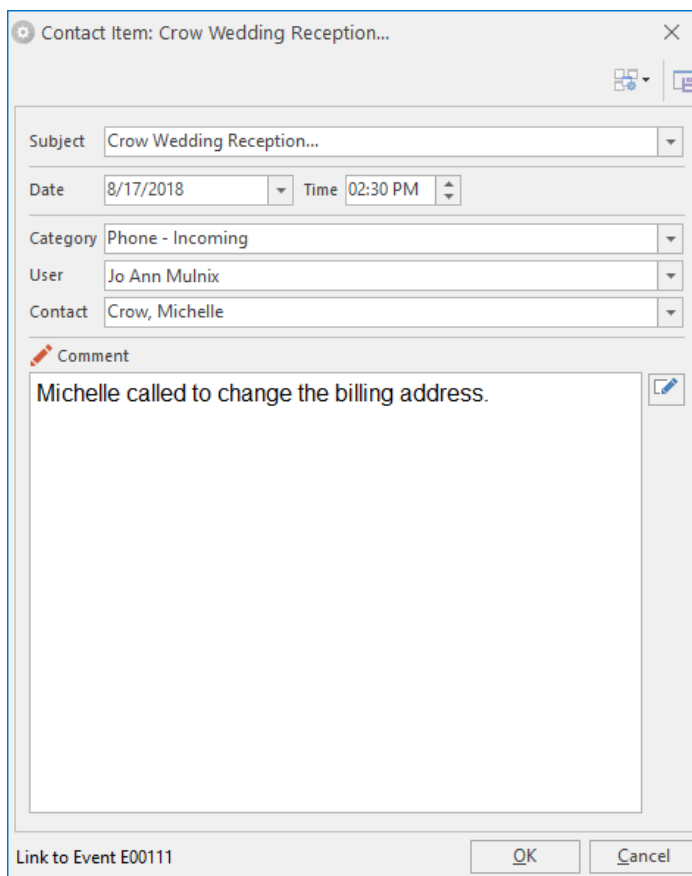
Creating a New Contact History Note from Event Manager

If you own the Contact Manager add-in module, you can use Contact History Notes to keep track of conversations and tasks pertaining to clients or events. When you take a phone call, edit an event, etc., you can quickly log that occurrence in a Contact History Note, which will automatically be stamped with the current date and time, in your Event Manager.

Adding a New Contact History Note in Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** sidebar group on the left-hand side of your screen.
2. Search for and select the account to which 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 access this tool from your **Tools** menu, located in the **Home** ribbon tab at the top of your screen, depending on your personal configuration).

Result: The Contact Item window opens.



Contact Item: Crow Wedding Reception...

Subject: Crow Wedding Reception...

Date: 8/17/2018 Time: 02:30 PM

Category: Phone - Incoming

User: Jo Ann Mulnix


Contact: Crow, Michelle

Comment

Michelle called to change the billing address.

Link to Event E00111

OK Cancel

4. Type a subject into the Subject field, or select a subject from the drop-down quickpick list.
5. Complete the Date field by clicking the down arrow to the right of the field to access the calendar tool.
Note: *The current date is populated by default.*
6. Complete the Time field by typing directly into the field or using the up-and-down arrows to adjust the time.
Note: *The current time is populated by default.*
7. Complete the following Contact History Information fields:
 - **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.
 - **User** -- This is the person who performed the task to which this contact history note refers. Accept the default name or click the down arrow at the right of the field and choose from the drop-down list of options.
 - **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**.

Tip: Set up your Scratch Pad notes from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.

Unit 3: Managing Active Reminders and Contact History Notes

In this section, you will learn:

- Using the Active Reminders Tool
- Snoozing and Dismissing a Reminder
- Retrieving Linked Reminders into a Manager
- Viewing and Editing Reminders in Contact Manager
- Viewing Reminders in the Scheduler
- Exporting and Synchronizing Reminders in Outlook
- Deleting Your Inactive Reminders

Unit 3: Managing Active Reminders and Contact History Notes

Managing Active Reminders and Contact History Notes

The Active Reminders tool shows all reminders you currently need to address. The view you see depends on 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.

Using the Active Reminders Tool

1. Click the **Tools** sidebar item on the left-hand side of your screen.
2. Click the **Active Reminders** button.
Result: *The Reminder window opens.*
Note: *If you are logged in as an Administrator, you can elect to see reminders for all users or for individual users by clicking the down arrow to the right of the User Name field.*
3. Click on any reminder within the Reminders window.
4. **[Optional]** Click the **Details** button to view extended details about the reminder.

The screenshot shows the '2 Reminders' window. At the top, there are buttons for 'Print', 'Select', and 'Details'. Below these is a tab labeled 'Active Reminders'. The main area displays a table of reminders with columns 'Subject' and 'Due in'. The 'Start time' is 'Thursday, May 10, 2018 2:45 PM'. The table lists two reminders: 'Glessing Wedding' (2 days overdue) and 'Ladtech' (12 days overdue). Below the table are buttons for 'Dismiss All', 'Dismiss', and 'Snooze', along with a '10 minutes' dropdown. At the bottom, there is a 'User Name' dropdown set to 'All Users' and a checked checkbox for 'Automatically Show Reminders'. The 'Details' pane on the right shows information for the 'Ladtech' reminder, including Subject, Location, Date (5/10/2018 2:45 pm), User (Jo Ann Mulnix), Category (Urgent), Telephone ((612) 415-1252), Contact (Depisa, Bill), and Client (Ladtech). A text box at the bottom of the details pane contains the instruction 'Call to confirm guest count'.

Subject	Due in
Glessing Wedding	2 days overdue
Ladtech	12 days overdue

Details	
Subject	Ladtech
Location	
Date	5/10/2018 (2:45 pm)
User	Jo Ann Mulnix
Category	Urgent
Telephone	(612) 415-1252
Contact	Depisa, Bill
Client	Ladtech
Call to confirm guest count	

5. **[Optional]** Snooze, dismiss, or print the reminder.
Note: *You may also retrieve the reminder into a Manager. (See [Retrieving Linked Reminders Items into a Manager](#).)*

Snoozing and Dismissing a Reminder

You can set reminders and then determine how long before an action the reminder message will appear. When the reminder pops up, you can choose to snooze 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. Click the **Active Reminders** button from the **Tools** sidebar group, located on the left-hand side of your screen.
Result: *The Reminder window opens if you have any active reminders; if you do not have any active reminders, you will receive an informational prompt to that effect).*
Note: *If you are logged in as Administrator, you can opt to view reminders for all users or for individual users.*
2. Click on any reminder within the Reminders window to select it.
3. To snooze a reminder, click on one or more reminders and then click **Snooze**.
Note: *Indicate the amount of time you would like to snooze the reminder by clicking the down arrow to the left of the **Snooze** button.*

The screenshot shows a window titled "1 Reminder" with a close button (X) in the top right corner. Below the title bar are icons for "Print", "Select", and "Details". The main content area is divided into two sections. The left section, titled "Glessing Wedding", shows a calendar icon, the start time "Sunday, May 20, 2018 4:00 PM", and a table with two columns: "Subject" and "Due in". The table contains one row: "Glessing Wedding" with a value of "2 days overdue". Below the table are buttons for "Dismiss All" and "Dismiss", a dropdown menu set to "10 minutes", and a "Snooze" button. The right section, titled "Details", contains a table with the following information: Subject: Glessing Wedding, Location: (blank), Date: 5/20/2018 (4:00 pm), User: Administrator, Category: (blank), Telephone: (612) 541-0444, Contact: Glessing, Michelle, Client: Glessing Wedding. Below this table is a text box containing "Call for final guest count...". At the bottom of the window, there is a "User Name:" dropdown menu set to "Administrator" and a checkbox labeled "Automatically Show Reminders" which is checked. On the far right, it says "Linked to Event E00027".

Dismissing a Reminder

1. Click the **Tools** sidebar item on the left-hand side of your screen.
2. Click the **Active Reminders** button.
Result: *The Reminder window opens.*
Note: *If you are logged in as Administrator, you can decide to see reminders for all users or for individual users.*
3. Click on any reminder within the Reminders window to select it.

4. To dismiss a reminder, click on one or more reminders and then click **Dismiss**; to dismiss all reminders, click **Dismiss All**.

Result: All current reminders are dismissed and removed from the Reminders window.

Note: Click the **Create Contact History Item On Dismiss** button  prior to clicking **Dismiss/Dismiss All** if you want this action to automatically create a contact history note.

1 Reminder

Print

Select

Create Contact History Item On Dismiss

Details

Glessing Wedding

Start time: Sunday, May 20, 2018 4:00 PM

Subject	Due in
Glessing Wedding	2 days overdue

Dismiss All

Dismiss

10 minutes

Snooze

User Name: Administrator

Linked to Event E00027

☒ Automatically Show Reminders

Details

Subject

Glessing Wedding

Location

Date

5/20/2018 (4:00 pm)

User

Administrator

Category

Telephone

(612) 541-0444

Contact

Glessing, Michelle

Client

Glessing Wedding

Call for final guest count...

Retrieving Linked Reminder Items into a Manager

You can view a reminder and then retrieve that reminder into a Manager, where you can address the task the reminder has prompted you to complete.

Retrieving Linked Reminders into a Manager

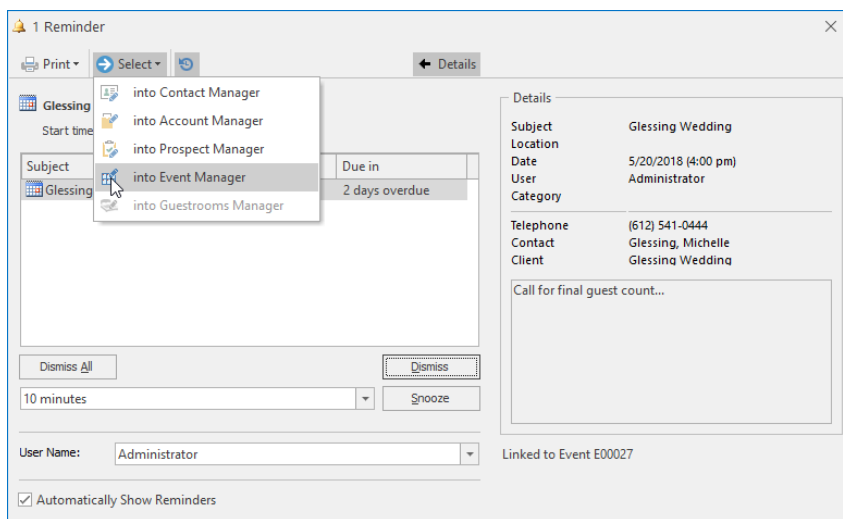
1. Click the **Tools** sidebar group on the left-hand side of your screen.

2. Click the **Active Reminders** button.

Result: *The Reminder window opens.*

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

3. Click the **Select** button at the top left-hand side of the window.



4. Choose which Manager you would like to associate with the reminder. Your list of options will depend upon which modules you own.

Note: *You will be prompted to confirm your choice:*

- **Into Contact Manager** -- This option will open Contact Manager, and positions you on the account associated with this reminder.
- **Into Account Manager** -- This option will open 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 will open Event Manager on the event that this reminder is linked to.

Note: *If this option is not available when you click **Select**, this means that the highlighted (selected) reminder is not linked to an event.*

- **Into Guestrooms Manager** -- This option will open Guestrooms Manager on the account that this reminder is linked to.

Note: *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.*






5. Click **OK** at the confirmation prompt.

Result: *The reminder is retrieved into the Manager you selected.*

Viewing and Editing Reminders in Contact Manager

Reminders can be viewed in Event Manager, but they must be edited in Contact Manager.

Viewing and Editing Reminders

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** Caterease sidebar.
2. Click the **Reminders** tab, located towards the upper middle area of your screen.
3. Click on the reminder, in the **Reminders** grid, you would like to view or edit.
4. Click the **Reminder Details** button , located on the right-hand side of the screen.
Result: *The Reminder window opens.*
Note: *You may also view a reminder by double-clicking the reminder in the Reminder details grid.*
5. Edit the reminder information as necessary.
6. Click **OK** to close the window, saving your changes.
7. **[Optional]** Click the **Show Reminder Comment** button  to view the comments related to the reminder.
Result: *The comments that were entered into the **Message** area on the Reminders screen will be displayed in a text block below the **Date** and **Time** columns.*
8. **[Optional]** Click the **Quick Column Customizing** button , located to the left of the **Date** column, to customize the categories you would like to display on-screen.
9. **[Optional]** Click the **Save Current Window Settings** button  if you would like to keep the **Show Reminder Comment** button  activated as a default setting on the Contact Manager screen.

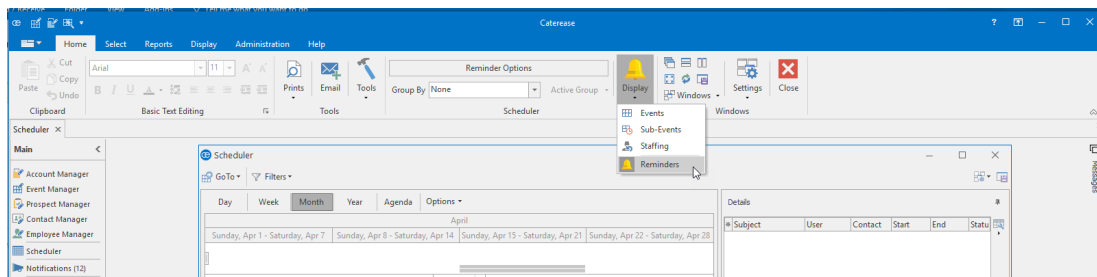
Viewing Reminders in the Scheduler

You can see reminders in a day-at-a-glance, a week-at-a-glance, a custom work-week-at-a-glance, or a month-at-a-glance display, just like you would in Microsoft Outlook.

Viewing Reminders in the Scheduler

1. Click the **Scheduler** button from the **Main** sidebar group, located on the left-hand side of your screen.
2. Click the **Display** button, located on the **Home** ribbon tab, and choose **Reminders**.
3. **[Optional]** Click the down arrow next to **Group By**, at the top left of the window, and choose **Status**, **User**, **Category**, **Location**, or **None**.

***Note:** Administrators are able to view reminders for all users. If you are logged in as a specific user, only your reminders will appear in the calendar display.*



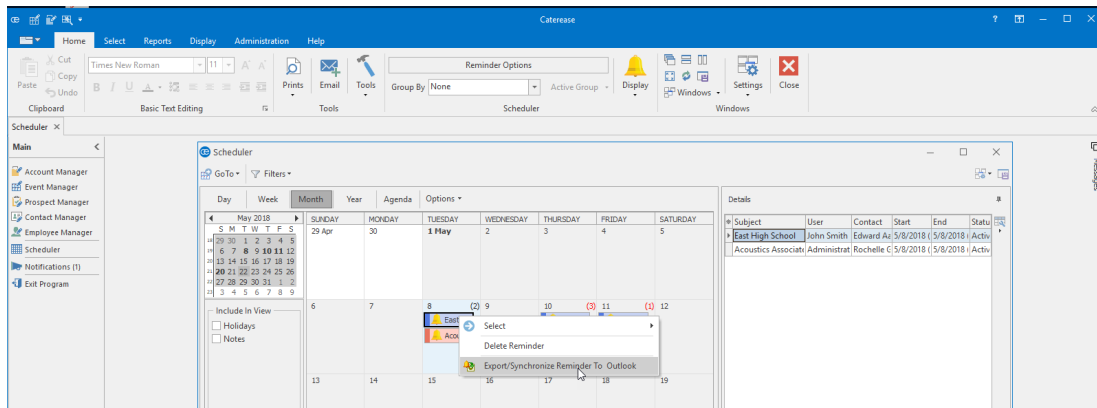
4. **[Optional]** Export or synchronize your reminders.

Exporting and Synchronizing Reminders in Outlook

If you use the calendar in Microsoft Outlook, you are able to sync your events and reminders with your Caterease events and reminders.

Exporting/Synchronizing a Single Reminder in Outlook

1. Click the **Scheduler** button from the **Main** sidebar group, located on the left-hand side of your screen.
Result: *The Scheduler opens.*
2. Click the **Display** button, located on the **Home** ribbon tab, and select **Reminders**.
3. From the Scheduler screen, right-click on the event you would like to export/synchronize to Outlook and select **Export/Synchronize Reminder to Outlook**.
Result: *A confirmation prompt appears.*
Note: *You also have the option of synchronizing from Outlook. To accomplish this, simply choose **Synchronize From Outlook**.*



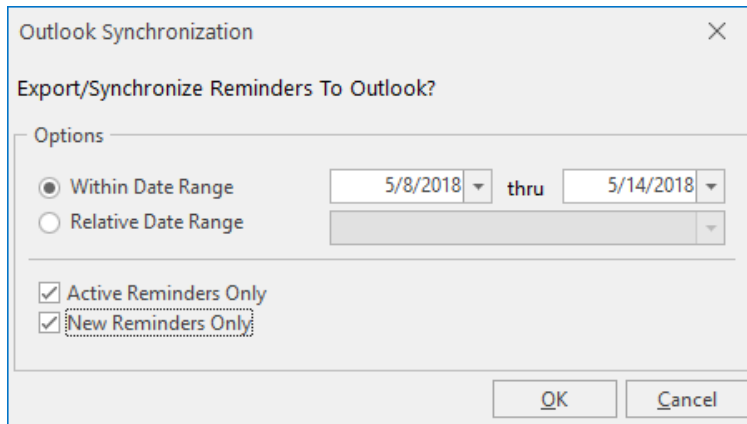
4. Click **Yes** to confirm.
Result: *A second confirmation prompt appears.*
5. Click **OK**.

Exporting/Synchronizing Multiple Reminders in Outlook

1. From the **Reminders** display, right-click anywhere on the Scheduler screen and select **Export to Outlook**.
Result: *The Outlook Synchronization window opens.*
Note: *You also have the option of synchronizing from Outlook; simply choose **Synchronize From Outlook**. Outlook must be open in order to perform this operation.*
2. Choose to export within a specific date range or a relative date range.
3. Choose to export **Active Reminders Only** or **New Reminders Only**.
Note: *Click into both checkboxes if you would like to export both active and new reminders.*

4. When finished making your selections, click **OK**.

Result: An informational prompt appears, indicating the reminders have been exported to Outlook.




The image shows a dialog box titled "Outlook Synchronization" with a close button (X) in the top right corner. Below the title bar, the text "Export/Synchronize Reminders To Outlook?" is displayed. Underneath, there is a section labeled "Options" which contains two radio button options: "Within Date Range" (selected) and "Relative Date Range". The "Within Date Range" option has two date pickers: the first shows "5/8/2018" and the second shows "5/14/2018", with the word "thru" between them. Below these, there are two checked checkboxes: "Active Reminders Only" and "New Reminders Only". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

Deleting Your Inactive Reminders

You can delete old reminders that have been made inactive but still exist in your Contact Manager. These inactive reminders can be deleted individually, in a batch, or automatically.

Deleting an Individual Reminder

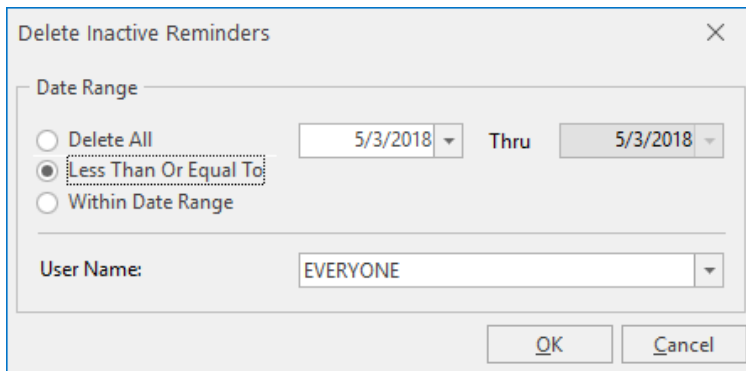
1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** Caterease sidebar.
2. Click the **Reminders** tab.
3. Click on reminder you would like to delete.

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

5. Click **Yes**.
Result: The Reminder is deleted.

Deleting all Inactive Reminders

1. From Contact Manager, click the **Tools** button at the top of your screen.
2. Select **Delete Inactive Reminders**.
Result: The Delete Inactive Reminders window opens.
3. Select a **Date Range**.
Note: Click the **Delete All** radio button to delete all inactive reminders or choose **Less Than or Equal To** (for reminders before or on a specific date) or **Within Date Range** (for reminders spanning a specific date range).
4. Click the down arrow to the right of the User Name field and choose whose reminders will be deleted. Choose from among individual sales reps, Everyone, or Administrator (if you are logged in as an Administrator).



5. Click **OK**.

Result: An informational prompt displays, indicating the number of inactive reminders that have been deleted.

6. Click **OK**.

Result: The inactive reminders are deleted.

Automatically Deleting all Inactive Reminders

1. From the **Setup** sidebar, click the **Global Settings** button.

Result: The View/Edit Caterease Global Settings window opens.

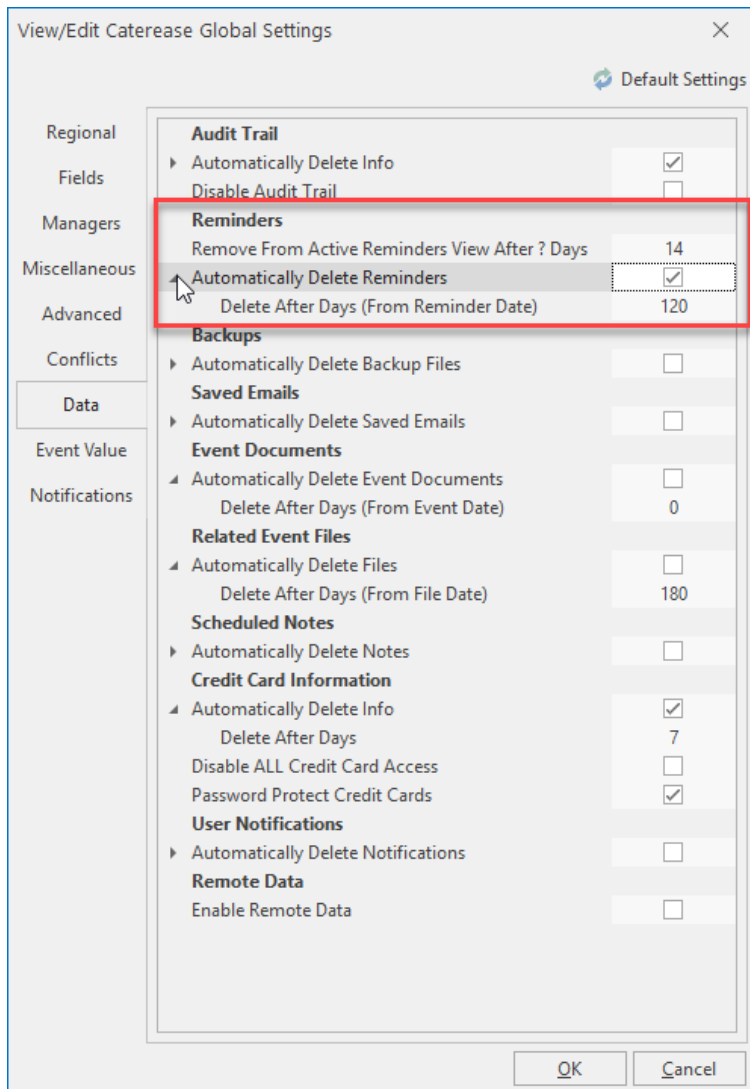
Note: You may be prompted to close all open windows. Click **Yes**.

2. Click the **Data** tab.

3. Type the number of days after which you would like the reminder to automatically be removed from the active reminders window into the Remove From Active Reminders View After ? Days field.

Note: You can also use the up-and-down arrows to adjust the setting.

4. Click the expand button next to **Automatically Delete Reminders**, and then indicate the number of days you would like to retain the reminder before it is deleted, in the Delete After Days (From Reminder Date) field.



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

Result: Your reminders will automatically be deleted according to the parameters you set.

Unit 4: Printing and E-mailing from Contact Manager

In this section, you will learn:


- Printing a Letter or Document from Contact Manager
- Editing a Merge Letter or Document On-the-Fly
- Printing Reminder Lists
- Printing Contact History Notes
- Managing Your E-mail

Unit 4: Printing and E-mailing from Contact Manager

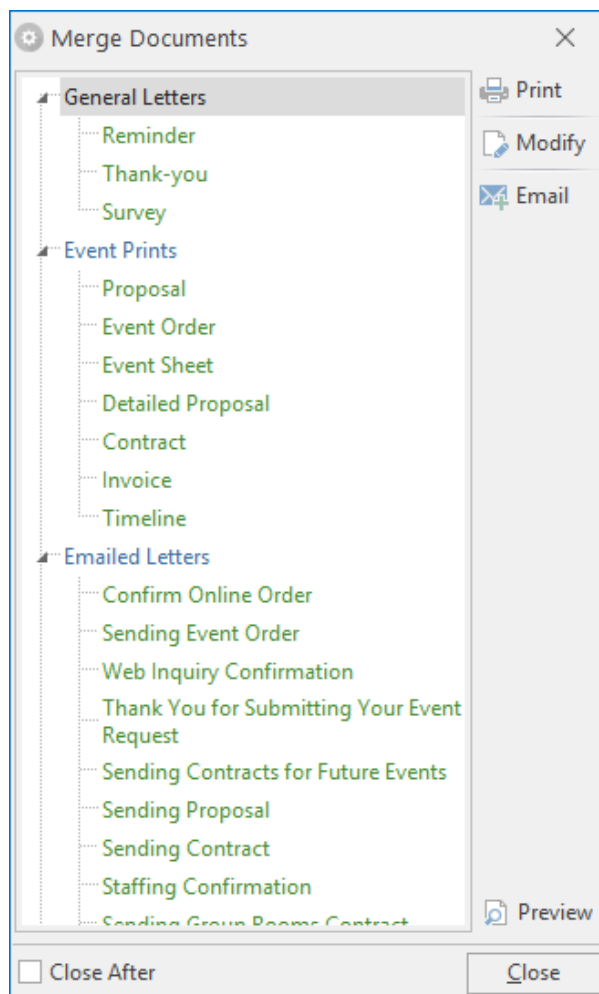
Printing and Emailing from Contact Manager

If you own the Marketing Tools add-in to Caterease, you have the ability to create custom merge letters, prints, and other documents that you can print for an account. In addition, you have the ability to modify your letter or document on-the-fly and even send it out in an e-mail.

Printing a Letter or Document from Contact Manager

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** Caterease sidebar.
2. Click the **Merge Documents** button , located in the toolbar on the right-hand side of your screen. (You may also select this option from your **Tools** menu, located at the top of your screen.)

Result: The Merge Documents window opens.



3. Click on the name of the document you would like to print.

- Click the **Print** button.

Result: The Print Preview screen opens.

Note: You may be prompted to save your changes.

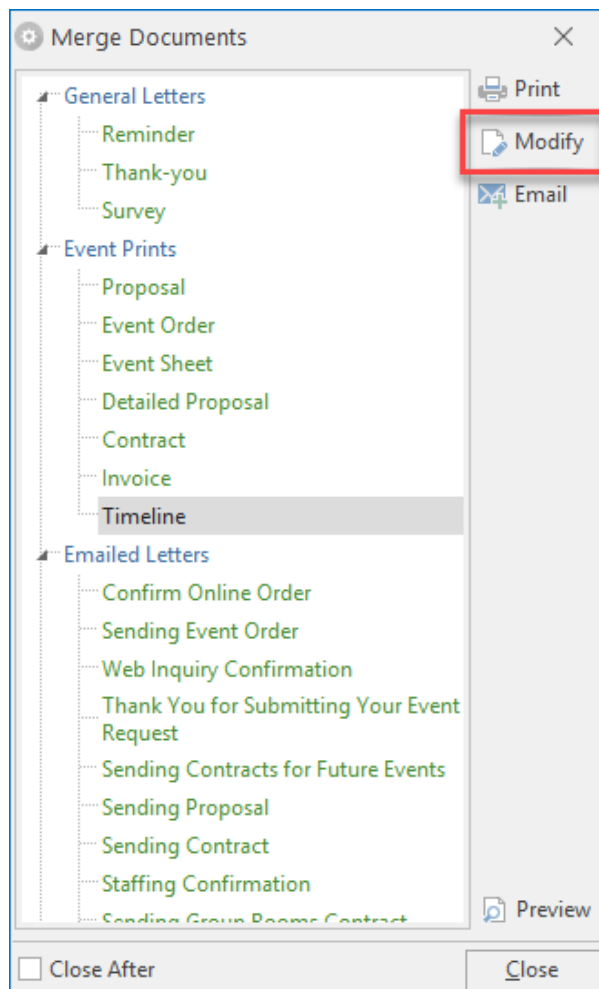
- Click the **Print** button, located on the top left-hand side of the Print Preview screen.

Editing a Merge Letter or Document On-the-Fly

- From Contact Manager, use the Search tools to find the contact for whom you would like to print a letter or document.

- Click the **Merge Documents** button , located in the toolbar on the right-hand side of your screen or from the Tools menu.

Result: The Merge Documents window opens.



- In the pop-up window, select a custom merge letter or print.

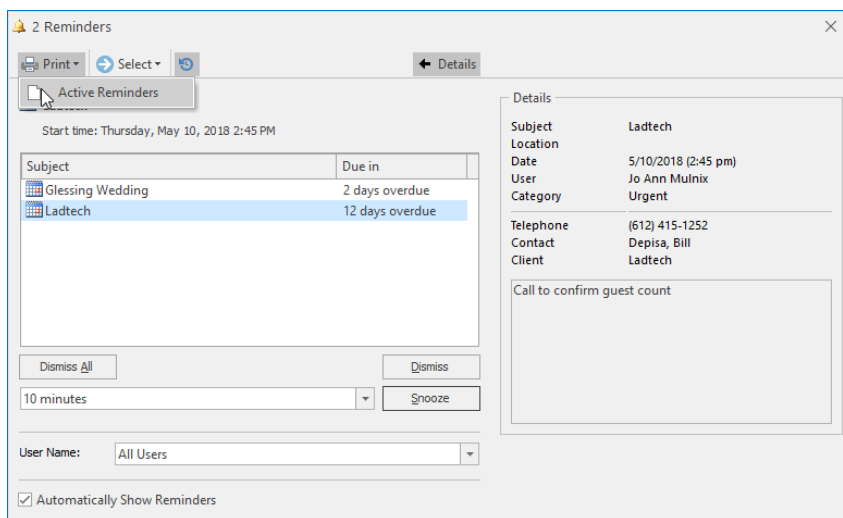
4. Click the **Modify** button.
5. Edit the document as desired.
Note: *This one-time modification applies to this document only; it will not alter your original document.*
6. Print the modified document, or export to PDF, Word, Excel, or other file type as desired.

Printing Reminder Lists

There are two types of reminder prints you can generate from Contact Manager: First, you can choose to print a list of all reminders for the account currently displayed. You can also generate a print to show all reminders for all accounts -- for one user or all users -- based on a date range.

Printing Reminder Lists

1. Click the **Tools** sidebar area, located on the left-hand side of your screen.
2. Click the **Active Reminders** button.
Result: *The Reminder window opens.*
Note: *If you are logged in as an Administrator, you can elect to see reminders for all users or for individual users by clicking the down arrow to the right of the User Name field.*
3. Click the **Print** button, located on the upper left-hand side of the window, and select **Active Reminders**.

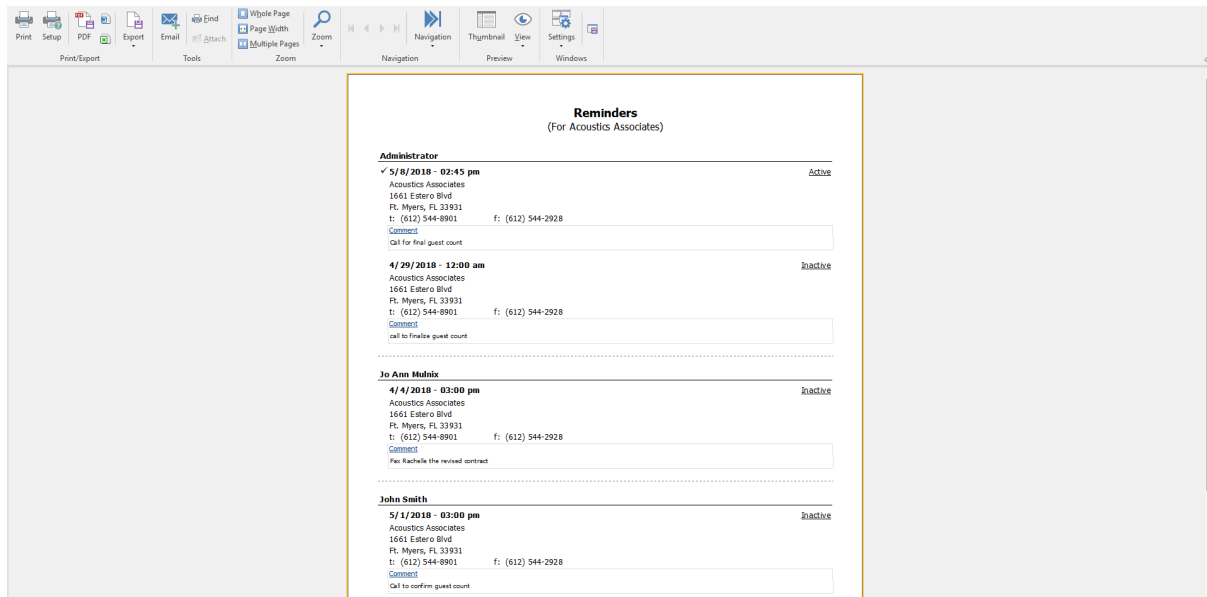


4. From the Print Preview screen which displays, click the **Print** button, located at the top left-hand side of the window.

Printing Reminders for One Account

1. From Contact Manager, search for and select the account for which you would like to print a Reminders list.
2. Click the bottom portion of the **Prints** button, located in the **Home** ribbon tab at the top of the screen.
3. Click **Contact Manager** and then choose **Reminders**.
Result: *A Print Preview screen opens.*
4. From the Print Preview screen, click the **Print** button, located on the upper left-hand side of the

screen.



Printing All Reminders for a Day or Date Range

1. Click the **Reports** ribbon tab from the top of your Caterease screen.
2. Click **Contacts** and choose **Total Reminders**.
Result: The Reminders window opens, where you can set your parameters.
3. 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.
4. **[Optional]** Change the title of the report by highlighting the words "Reminders" and typing directly into the Title field.
5. **[Optional]** Click the checkbox next to Specific User if you would like to generate a report for a specific user; otherwise, reminders for all users will be displayed on the report.
6. Optionally Include Linked Event Information and Inactive Reminders.
7. **[Optional]** Click the down arrow under Group By and choose to group by a particular detail.
Note: A second Group By field is available if you want to establish a second group-by detail.
8. Click **OK** to generate the report.
Result: The Reminders report is generated, incorporating the parameters you set.

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

Set Parameters

Date Range

☐ Less Than Or Equal To 5/1/2018 thru 5/31/2018

☐ Greater Than Or Equal To

☐ Within Date Range

☒ Relative Date Range This month

Title

Reminders

Options

☒ Specific User Kathy Wilson

☐ Include Linked Event Information ☐ Include Inactive Reminders

☒ Details

☐ Summary

Group By

Client

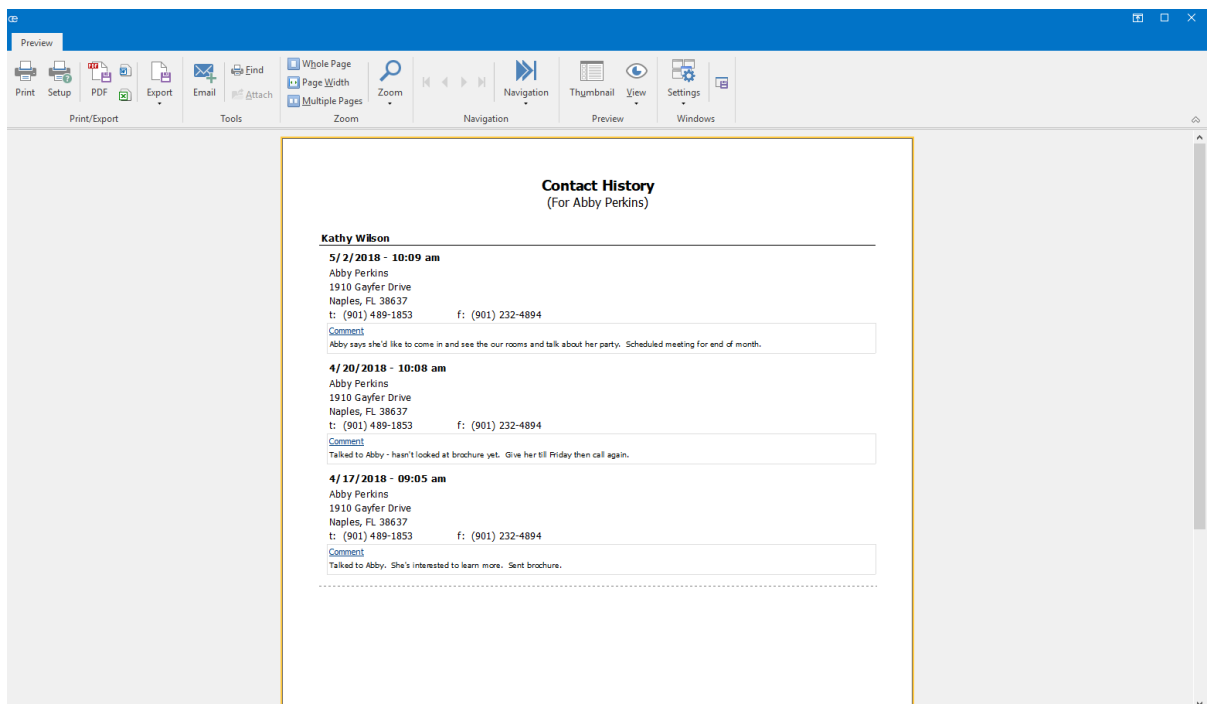
None

Printing Contact History Notes

There are two types of Contact History Notes you can generate from Contact Manager: First, you can choose to print a list of contact history notes for the account currently displayed. You can also generate a print to show all contact history notes for all accounts -- for one user of all users -- based on a date range.

Printing Contact History for One Account

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** Caterease sidebar.
2. Search for and select the account for which you would like to print Contact History Notes.
3. Click the bottom portion of the **Prints** button at the top of the screen.
4. Click **Contact Manager** and then choose **Contact History**.
Result: The Contact History Print Preview Screen displays.
5. Click the **Print** button, located on the upper left-hand side of the Print Preview screen.



Printing Contact History Notes for a Day or Date Range

1. Click the **Reports** ribbon tab from the top of your Caterease screen.
2. Click the **Contacts** button and choose **Total Contacts Made**.
Result: The Contacts Made window opens, where you can set your parameters.

3. 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.
4. **[Optional]** Change the title of the report by highlighting the words "Contacts Made" and typing directly into the Title field.
5. **[Optional]** Click the checkbox next to Specific User if you would like to generate a report for a specific user; otherwise, contact history notes for all users will be displayed on the report.
6. **[Optional]** Click into the checkbox next to Include Linked Information if you would like the report to display information related to the event.
7. Indicate whether you would like the report to generate a detailed breakdown or a condensed summary by clicking the Details or Summary radio buttons, respectively.
8. **[Optional]** Click the down arrow under Group By and choose to group by a particular detail. *(This option pertains to Summary view.)*
Note: A second Group By field is available if you want to establish a second group-by detail.
9. Click **OK** to generate the report.
Result: The Contacts Made report is generated, incorporating the parameters you set.

Contacts Made

Set Parameters

Date Range

☐ Less Than Or Equal To 3/1/2018 thru 3/31/2018

☐ Greater Than Or Equal To

☐ Within Date Range

☒ Relative Date Range This month

Title

Contacts Made

Options

☒ Specific User EVERYONE

☐ Include Linked Event Information

☐ Details

☒ Summary

Group By

User

Client

☐ Close After Printing

OK Cancel

Tip: Click into the **Close After Printing** checkbox if you would like the Contacts Made window to close after your report has been generated.

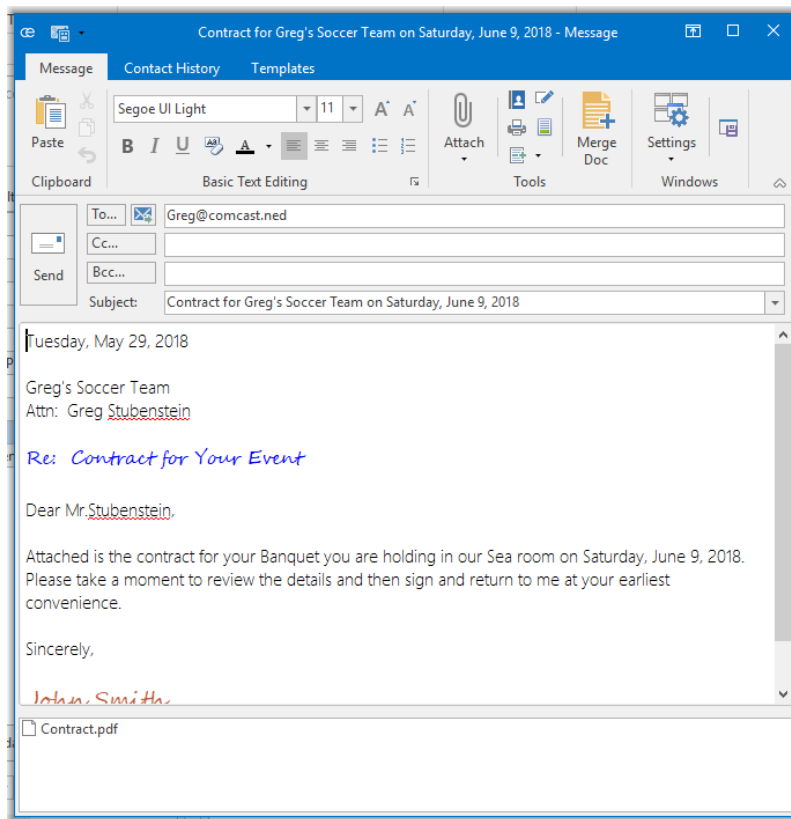
Managing Your E-mail

One click opens a familiar e-mail window, allowing you to instantly send an e-mail message directly from Contact Manager. From the Emails Sent tab, you can view the body of the e-mail and then re-send the e-mail, if necessary.

Sending an E-mail from Contact Manager


1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** Caterease sidebar group, located on the left-hand side of your screen.
2. Use the Search tools to find and retrieve the contact to whom you would like to send an e-mail.
3. Click the **Email** button, located at the top of the screen.
***Result:** The Email window opens.*
***Note:** The **Email** button is also available from any Print Preview screen, and will automatically attach whatever print you are previewing (Confirmation, Invoice, etc.), to the outgoing e-mail.*
4. In the To... field, type any additional e-mail recipients (the primary contact displays as a default) or click the **To...** button to access additional e-mail addresses.
5. **[Optional]** In the Cc field, type the e-mail address of the carbon-copy recipient here (separate multiple recipient addresses by semicolons).
6. **[Optional]** In the Bcc field, type the e-mail address of the blind carbon-copy recipient here (separate multiple recipient addresses by semicolons).
7. In the Subject field, type a subject for your e-mail or click the down arrow to the right of the field to access a custom quickpick list.
8. Click into the large white text block in the window and type a message as the body of your e-mail.
***Note:** If you own the Marketing Tools add-in, you can use one of your custom merge letters as the body of the e-mail. These letters will automatically merge in information from the current contact, including name, salutation, current date, etc.*
9. **[Optional]** Format the text using the **Format** toolbar at the top of your e-mail window.

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



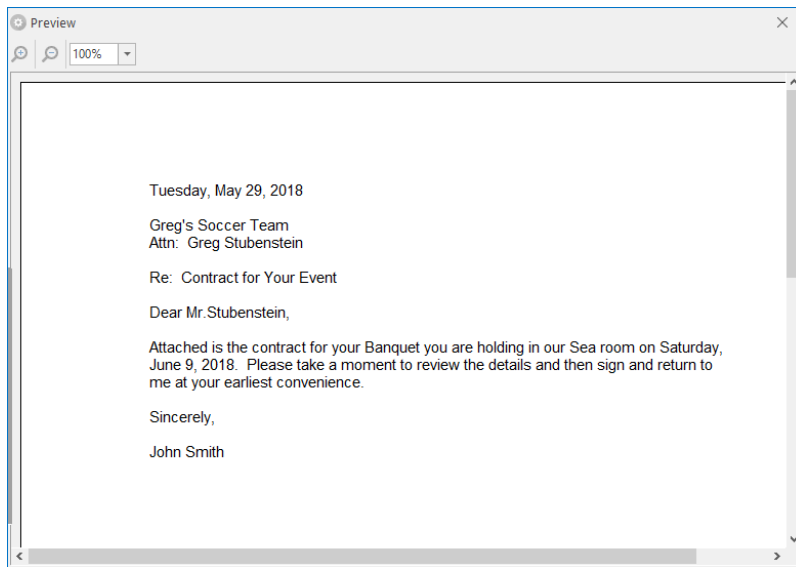
Viewing Sent E-mails from Contact Manager


1. From Contact Manager, search for and select an account.
2. Click the **Emails Sent** tab, located towards the upper middle area of your screen, to access the e-mail information.
3. Click on the e-mail you would like to view/edit.

4. Click the **View Email** button , located on the right-hand side of the window, to view the e-mail that was sent.

Result: The email window opens.

Note: Use the zoom-in/zoom-out buttons to increase or decrease the size of the e-mail, or click the down arrow to the right of the Percentage field to select a zoom-in/zoom-out percentage.




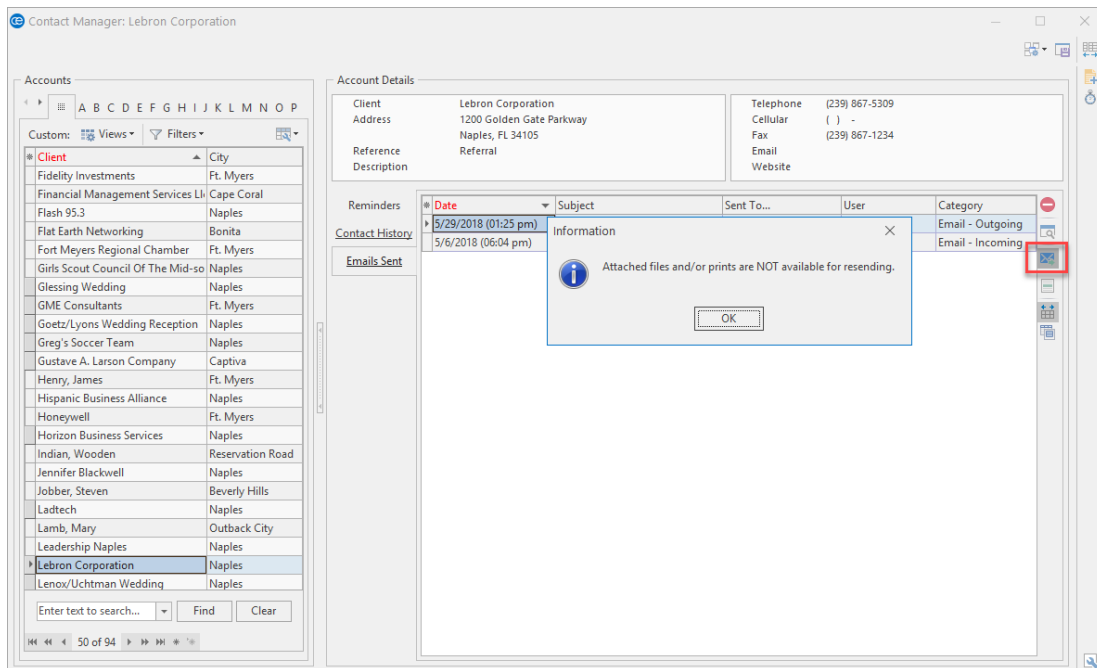
5. Click the **Preview Email Comment** button  , located on the right-hand side of the screen.
Result: The e-mail note will display in blue text below its date and time details.
Note: Click the **Preview E-mail Comment** button again and the note will close; click the **Save Current**

Window Settings button  if you would like the button to remain active.

6. [Optional] Click the **Quick Column Customizing** button  at the top left corner of the grid view and check off other columns of details to be displayed in the grid.
Result: Any selected column is instantly displayed in the grid.

Re-sending an E-mail from Contact Manager

1. From Contact Manager, click the **Emails Sent** tab, located at the bottom of the screen.
2. Click on the e-mail you would like to re-send.
3. Click the **Resend Email** button  , located on the right-hand side of the window.
Result: An informational prompt appears, indicating that attached files/prints are not available for re-sending.



4. Click **OK**.

Result: The Email window opens.

5. Reattach any prints or files to the e-mail.

Note: Attached files appear in the small pane at the bottom of the E-mail window.

6. Click **Send**.

Result: The e-mail is re-sent, along with the attached prints or files.

Unit 5: Customizing Your Contact Manager

In this section, you will learn:

- Adding Quickpick List Items to the Reminder Category Field
- Adding Quickpick Items to the History Category Field
- Deleting a Quickpick Item
- Modifying Existing Quickpick Items
- Rearranging Existing Quickpick Items
- Stretching the Grid Pane
- Manipulating the Grid

Unit 5: Customizing Your Contact Manager


Adding Quickpick List Items to the Reminder Category Field

Throughout your Caterease program there are several drop-down menus, or quickpick lists, to assist you in data entry. These lists exist to save you the tedium of double data entry, and allow you to keep your data consistent. These lists are completely under your control, and you can edit them at any time. In addition, you can track the quickpicks in queries and reports.

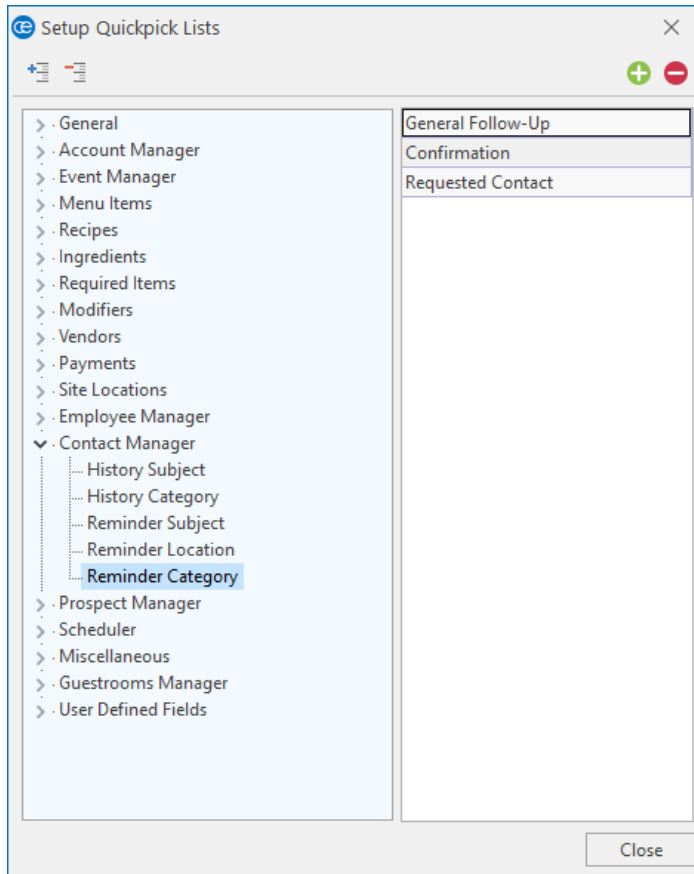
Adding Quickpick List Items to the Reminder Category Field

1. Click the **Setup** sidebar item from your main Caterease screen.
2. Click the **Quickpicks** button.
Result: The Setup Quickpick Lists window opens.
3. From the Setup Quickpick Lists window, click the expand button, to the left of the word **Contact Manager**, to display the sub-categories.

Note: You may also click the **Full Expand** button  to expand all lists.

4. Click **Reminder Category**.
5. Click the **Add New Item** button , located on the upper right-hand side of the window.
Result: A blank field appears.
6. Type the name of your quickpick item into the field provided.
7. When finished adding your quickpick items, click **Close**.

Tip: Quickpick items can be rearranged by dragging and dropping into the desired position.



Adding Quickpick Items to the History Category Field

1. Click the **Setup** sidebar area and select **Quickpicks**.

Result: The Setup Quickpick Lists window opens.

2. Click the expand button, to the left of the **Contact Manager** category, to reveal the sub-categories.

Note: You may also click the **Full Expand** button  to expand all lists.

3. Click **History Category**.

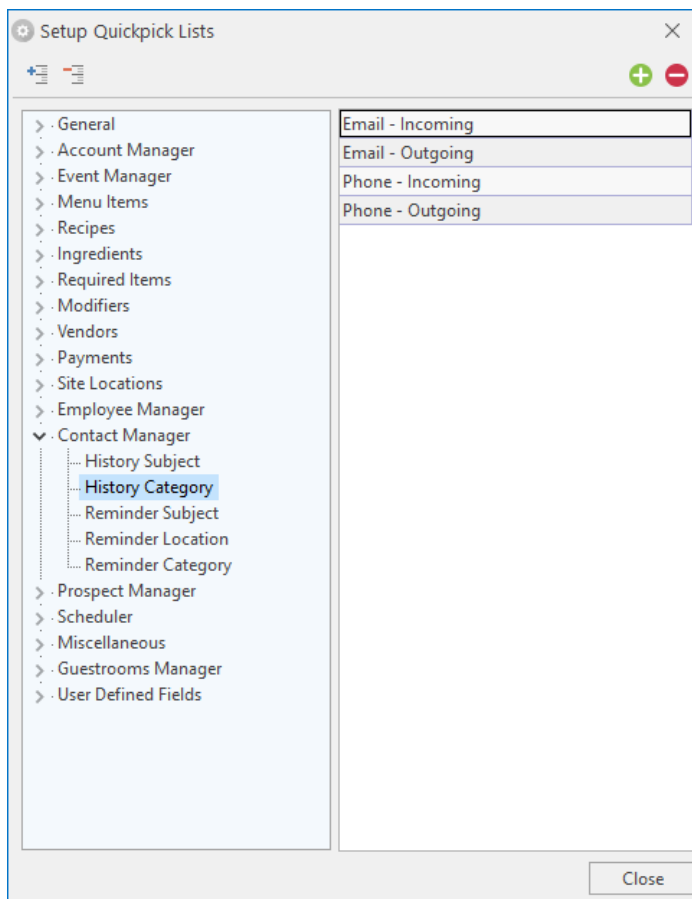
4. Click the **Add New Item** button .

Result: A blank line is added to the bottom of the list.


5. Type the history category name into field.

6. When finished adding quickpicks to the History Category fields, click **Close**.

Note: Quickpicks for History Subject, Reminder Subject, Reminder Location, and Reminder Category are added in the same way as described here.



Deleting a Quickpick Item

1. Click on the quickpick item you would like to remove from any of your quickpick lists.
2. Click the **Delete Current Item** button , located at the top right of the Setup Quickpick List form.
3. When finished deleting your quickpick item, click **Close**.

Modifying Existing Quickpick Items

1. Click on the quickpick item you would like to modify.
2. Type over the existing text as desired.
3. When finished, click **Close**.

Rearranging Existing Quickpick Items

1. Click and hold the left mouse button on any quickpick item.
2. Drag the quickpick item to a desired position. The position will be highlighted in gray.
3. Drop the quickpick item into position by releasing the left mouse button.
4. When finished, click **Close**.

Using the Contact Manager Grid

The left panel of Contact Manager can be stretched, shrunk, or collapsed completely, depending on your preference. You can determine which columns of information appear in your grid, and you can customize the grid to suit your needs.

Stretching the Grid Pane

1. Access Contact Manager by clicking the **Contact Manager** button from the **Main** Caterease sidebar.
2. Move your mouse pointer over the vertical frame between the grid along the left-hand side of your screen and the form displayed on the rest of your screen.

Result: Your mouse pointer turns into a double-headed arrow .

3. Hold your left mouse button down.

4. Drag your mouse to the right.

Result: The grid pane stretches in the direction you are dragging.


5. Release your mouse button.

Result: Your grid pane has been re-sized.

Note: If you want your new look to be the default display for your Contact Manager, don't forget to

click the **Save Current Window Settings** button  at the top of your screen to save your new changes.

Manipulating the Grid



1. Click the **Display Full Grid** button , located at the top right-hand side of your screen.
Result: Your entire Contact Manager display becomes a grid, showing information in columns across the screen.
Note: This button is a toggle; you can click it again to return to your original split-screen layout. Be aware that, should you click on another account while in full-grid mode, you will move to that record. Therefore, if you then toggle back to your split-screen display, that account's reminders and contact history notes will be displayed.

2. Click the **Quick Column Customizing** button  to display a drop-down list of available fields.

Contact Manager: Acoustics Associates

Accounts



A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9

Custom:  Views  Filters

Client	Address	City	St/Prov	Postal	Account	Telephone	Category	Description	Reference	Sales Rep
Diebold Company	1063 10th Ave SE	Ft. Myers	FL	55414	1126	(612) 378-4000	Corporate	Chamber Member	Yellow Pages	Kathi Cleath
Ducks Unlimited	18543 83rd Ave. N.	Ft. Myers	FL	55313	1130	(612) 645-6446	Corporate	Association Member	Cold Contact	Jo Ann Mulnix
Dvorak Reception	3976 N. Orchid Lane	Naples	FL	34109	1134	(612) 437-0783	Social	Repeat Client	Yellow Pages	Jo Ann Mulnix
East High School	1 East Drive	Naples	FL	34102	1563	(218) 863-2911	School	VIP	Repeat Client	John Smith
Everblades Hockey	115 Ironwood Ave	Naples	FL	34110	1520	(612) 741-6658	Social	Repeat Client	Mailing	Kathi Cleath
Fedex--audrey Bourland	30 Fedex Parkway	Estero	FL	38017	A01529	(901) 263-3448	Corporate	Association Member	Referral	Jo Ann Mulnix
FGCU	1051 FGCU Blvd. S.	Ft. Myers	FL	33965	A01508	(239) 590-6653	Education	VIP	Referral	Roxanne M. Mc N
Fidelity Investments	7628 W. Farmington	Ft. Myers	FL	38138	A01530	(401) 292-4180	Corporate	Association Member	Referral	Kathi Cleath
Financial Management Services Ltd.	8308 Macon Road	Cape Coral	FL	38018	A01531	(901) 737-2988	Social	Association Member	Referral	Roxanne M. Mc N
Flash 95.3	230 Goodman Road Bldg 2,	Naples	FL	38671	A01532	(662) 349-0826	Social	Association Member	Referral	Raphael Tavaraz
Flat Earth Networking	57 Germantown Court, Suite	Bonita	FL	38018	A01533	(901) 517-4582	Corporate	Association Member	Referral	Jo Ann Mulnix
Fort Meyers Regional Chamber	22 N Front St., 2nd Floor	Ft. Myers	FL	38103	A01542	(901) 543-3518	Tour & Travel	Association Member	Referral	Jo Ann Mulnix
Girls Scout Council Of The Mid-so	2715 Kirby Parkway, Suite 1	Naples	FL	38119	A01535	(901) 767-1440	Social	Association Member	Referral	Kathy Wilson
Glessing Wedding	7432 Dupont Ave. S	Naples	FL	34106	1183	(612) 541-0444	Social	VIP	Repeat Client	Raphael Tavaraz
GME Consultants	14000 21st Ave. N.	Ft. Myers	FL	55447	1184	(612) 559-1859	Corporate	Association Member	Cold Contact	Jane Becker
Goetz/Lyons Wedding Reception	10655 104th Place	Naples	FL	34109	1186	(612) 578-9843	Social	VIP	Wedding Planner	Kathi Cleath
Greg's Soccer Team	6680 Crestview Lane NW	Naples	FL	34102	1190	(507) 253-1869	Social	VIP	Yellow Pages	John Smith
Gustave A. Larson Company	11546 Andy Rosse Lane	Captiva	FL	33924	1191	(612) 546-9508	Corporate	Chamber Member	Cold Contact	Kathy Wilson
Henry, James	103 Walsh St	Ft. Myers	FL	33965	A01584	(123) 665-4123	Education	VIP	Cold Contact	Kathy Wilson
Hispanic Business Alliance	7845 Highway 64	Naples	FL	38133	A01536	(901) 266-2999	Social	Association Member	Referral	Kathy Wilson
Honeywell	1161 N. Shelby Oaks Drive	Ft. Myers	FL	38134	A01537	(901) 367-5067	Social	Association Member	Referral	Jane Becker
Horizon Business Services	1020 Goodlette Road	Naples	FL	34102	A01501	(941) 261-6617	Corporate	Chamber Member	Mailing	John Smith
Indian, Wooden	Reservation City	Reservation Road	OK	64543	A01579	(878) 790-4567	Military	VIP	Yellow Pages	Jo Ann Mulnix

Enter text to search... Find Clear

2 of 94

3. In the drop-down list, click into a blank box to leave a check mark to display that field information in the details grid.
4. Click the **Quick Column Customizing** button  again to close the drop-down list.
5. Establish any desired Views and Filters.
6. Manipulate the detail grid by adding, removing, or rearranging columns, or sorting and grouping records.
7. When finished, click the **Display Full Grid** button  again.

Result: The Contact Manager screen returns to its original split-screen layout.



A Product of
Horizon Business Services, Inc.

Naples, FL 34101

T: 239.261.6617

F; 239.261.0067

www.caterease.com

help@caterease.com