Complete the Proposal

1. Click through the various available tabs within the Paperless Proposal menu.
2. The **Proposal Files** tab is where you will upload video, add a webpage, insert a table of contents, etc. Click the **Add to Proposal** button, select the desired option, and follow the prompts.
3. The **Email** tab is where you can optionally schedule the e-mail to be sent on a certain date and time. Click the down arrow to the right of the field to access the Date/Time fields.
   Note: Click the **Send with Paperless** button to generate the e-mail.
4. The **Stats** tab is where you will go to view tracking information about the proposal, such as when the proposal was sent; if/when it was downloaded; how many times it was viewed; and when it was last viewed.

Access the website *http://www.paperlessproposal.com*

Check the Proposal Status

1. From an event in Event Manager, click the **Paperless Proposal** button, located in the toolbar at the bottom of your Event Manager screen.
2. Click the **Add New Proposal File** button , located on the right-hand side of the window, to add more files to an existing proposal; click the **Open Paperless Proposal** button, located in the Proposals pane, to view/edit an existing proposal.
3. Click the **Add Files** button on the subsequent screen.

Additional Resources

http://www.paperlessproposal.com

CATEREASE

a product of
Horizon Business Services, Inc.
Naples, FL 34102
T: 239.261.6617
F: 239.261.0067
www.caterease.com

CATEREASE

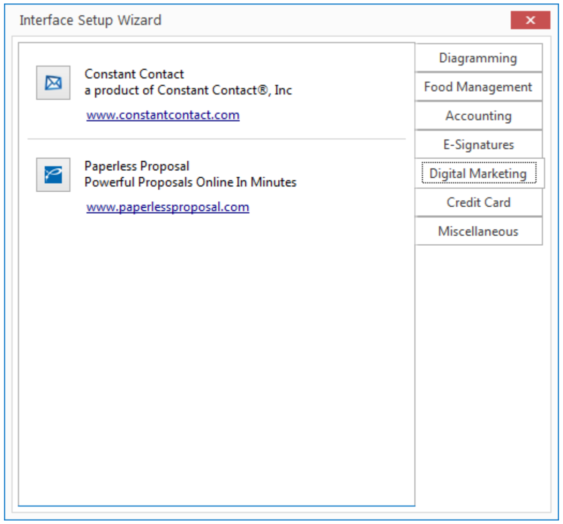
Quick Reference Guide:

Paperless Proposal

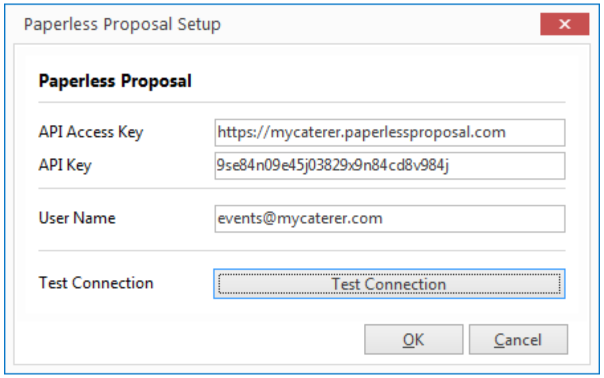
800.863.1616
www.caterease.com

Add Paperless Proposal to Caterease

1. Click the **Administration** ribbon tab, located at the top of your screen.
2. Click the **Options** button and choose **Interface Setup Wizard**.
3. Click the **Paperless Proposal** button , located on the **Digital Marketing** tab.


Interface Setup Wizard
Constant Contact
a product of Constant Contact®, Inc
www.constantcontact.com
Paperless Proposal
Powerful Proposals Online In Minutes
www.paperlessproposal.com
Diagramming
Food Management
Accounting
E-Signatures
Digital Marketing
Credit Card
Miscellaneous

4. Enter the API Access Key and the API Key (provided by Paperless Proposal) into the fields provided.
5. Enter the user name into the User Name field, and then click **Test Connection**.
6. Click **OK** at the informational prompt, and then click **OK** again to close the window.

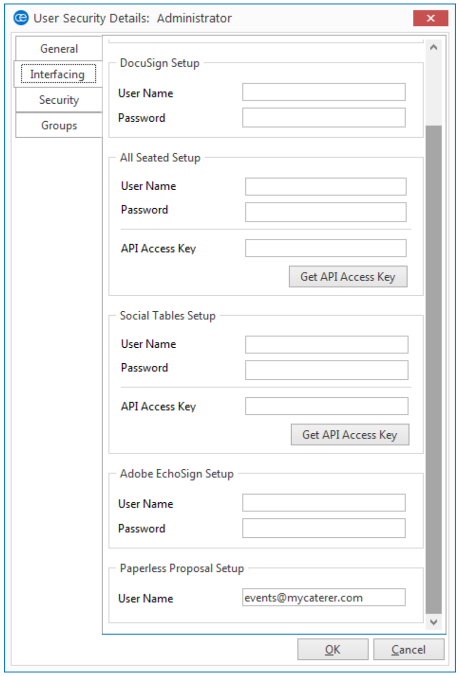

Paperless Proposal Setup
Paperless Proposal
Test Connection
Test Connection
OK
Cancel

API Access Key: https://mycaterer.paperlessproposal.com
API Key: 9se84n09e45j03829x9n84cd8v984j
User Name: events@mycaterer.com

See Using the Paperless Proposal Interface

Assign Individual Logins to Caterease Users

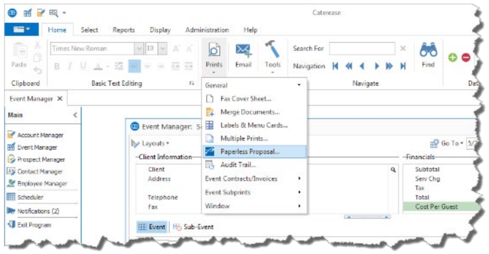
1. Click the **Security** button, located on the **Administration** ribbon tab.
2. Click the **Users** tab and access the User Security Details window for the desired user by double-clicking the user name.
3. Double-click on the desired User Name.
4. Click the **Interfacing** tab and enter the user name into the User Name field under the **Paperless Proposal Setup Area**.
5. Click **OK**.


User Security Details: Administrator
General
Interfacing
Security
Groups
DocuSign Setup
User Name
Password
All Seated Setup
User Name
Password
API Access Key
Get API Access Key
Social Tables Setup
User Name
Password
API Access Key
Get API Access Key
Adobe EchoSign Setup
User Name
Password
Paperless Proposal Setup
OK
Cancel

Paperless Proposal Setup — User Name: events@mycaterer.com

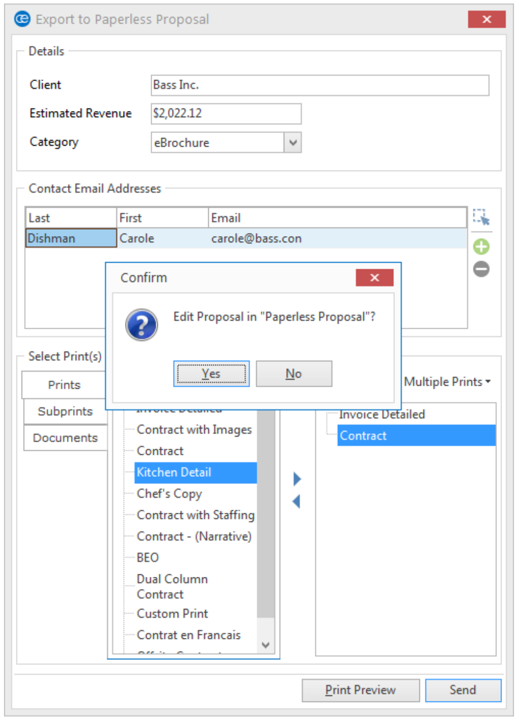
Access Paperless Proposal in Event Manager

1. From an event in Event Manager, click **Prints** > **General** > **Paperless Proposal**.


Caterease
Home
Select
Reports
Display
Administration
Help
Paste
Clipboard
Times New Roman
10
Basic Text Editing
Prints
Email
Tools
Search For
Navigation
Navigate
Find
General
Fax Cover Sheet...
Merge Documents...
Labels & Menu Cards...
Multiple Prints...
Paperless Proposal...
Audit Trail...
Event Contracts/Invoices
Event Subprints
Window
Event Manager
Main
Account Manager
Event Manager
Prospect Manager
Contact Manager
Employee Manager
Scheduler
Notifications (2)
Exit Program
Event Manager: S
Layouts
Client Information
Client
Address
Telephone
Fax
Go To
Financials
Subtotal
Serv Chg
Tax
Total
Cost Per Guest
Event
Sub-Event

Generate the Proposal

1. From the Export to Paperless Proposal window, you can select e-mail contacts that are associated with the account by clicking the **Select** button from the right-hand side of the window, or you can add e-mail recipients by clicking the **Add** button .
   Note: *This interface utilizes an e-mail validator; you must therefore provide a valid e-mail address.*
2. If you are adding an e-mail address, type the Last and First names into the fields provided.
3. Add the desired prints by clicking the print title from the left-hand pane and then clicking the arrow button , which will move the print to the right-hand pane.
4. **[Optional]** Click the **Print Preview** button, located at the bottom of the window, to view the print before you send it.
5. Click the **Send** button (located next to the **Print Preview** button) to send to Paperless Proposal.
6. Click **Yes** at the prompt below.


Export to Paperless Proposal
Details
Contact Email Addresses
Select Print(s)
Prints
Subprints
Documents
Multiple Prints
Confirm
Yes
No
Print Preview
Send

Client: Bass Inc.
Estimated Revenue: $2,022.12
Category: eBrochure

Last	First	Email
Dishman	Carole	carole@bass.con

Edit Proposal in "Paperless Proposal"?

Invoice Detailed
Contract with Images
Contract
Kitchen Detail
Chef's Copy
Contract with Staffing
Contract - (Narrative)
BEO
Dual Column Contract
Custom Print
Contrat en Francais

Invoice Detailed
Contract