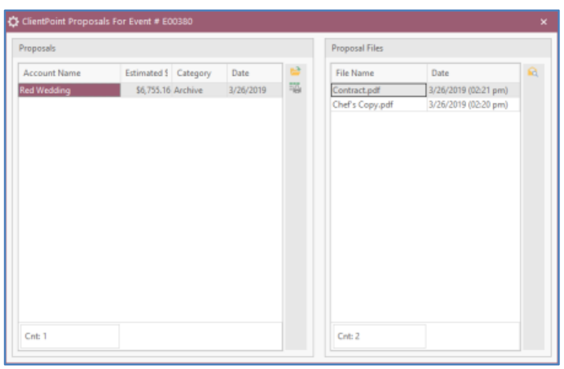
Complete the Proposal

1. Click through the various available tabs within the ClientPoint menu.
2. The **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 **Send** 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.
4. The **Analytics** 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.

   (For more information about ContactPoint, access the website http://www.clientpoint.net/)

Check the Proposal Status

1. From an event in Event Manager, click the **ClientPoint** button, located in the toolbar on the right-hand side of your Event Manager screen or from the **Tools** menu, depending on your configuration.
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.
   Note: *Click the* ***Open ClientPoint 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

[Using the ClientPoint Interface](#)
[Customizing the Tools Menu and Tools Bar](#)

CATEREASE

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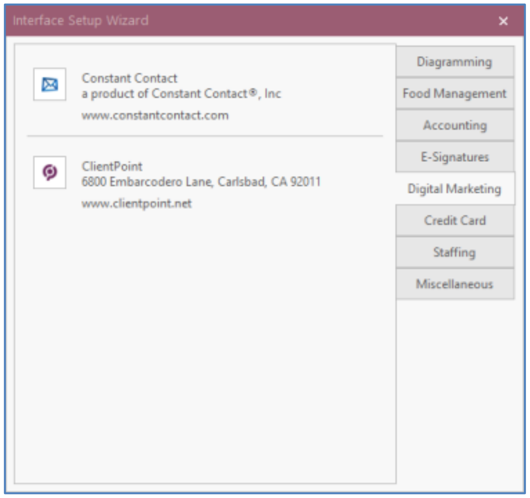
CATEREASE

Quick Reference Guide:
ClientPoint

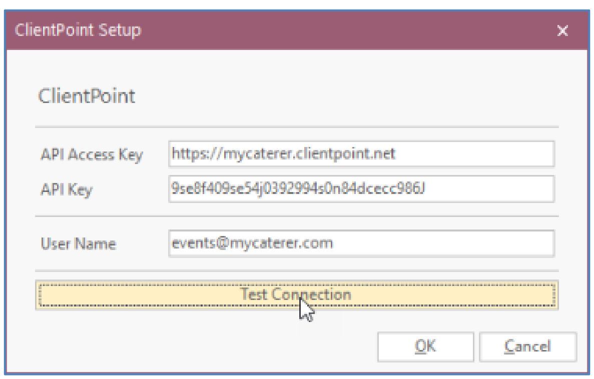
800.863.1616
www.caterease.com

Add ClientPoint 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 **ClientPoint** button, located on the **Digital Marketing** tab.

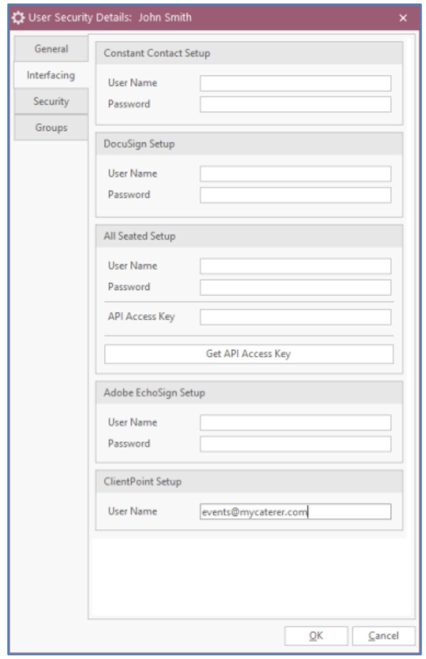


4. Enter the <u>API Access Key</u> and the <u>API Key</u> (provided by ClientPoint) into the fields provided.
5. Enter the user name into the <u>User Name</u> field, and then click **Test Connection**.
6. Click **OK** at the informational prompt, and then click **OK** again to close the window.



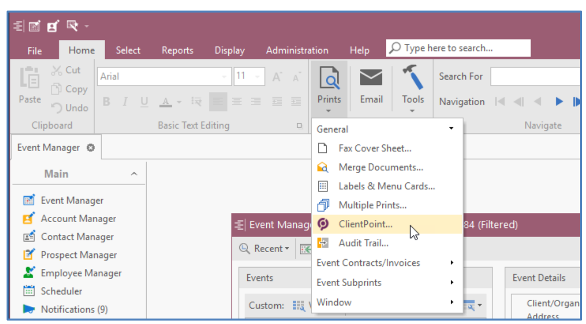
Assign Individual Logins to Caterease Users

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. Click the **Interfacing** tab and enter the user name into the <u>User Name</u> field under the **ClientPoint Setup Area**.
4. Click **OK**.



Access ClientPoint in Event Manager

From an event in Event Manager, click **Prints** > **General** > **ClientPoint.**



Generate the Proposal

1. From the Export to ClientPoint 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 <u>Last</u> and <u>First</u> 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 ClientPoint.