Training Guide

Managing Your Reminders and Contact History in Contact Manager

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Unit 1: Finding an Account in Contact Manager

The Contact Manager is an add-in to the Caterease application. Contact Manager enables you to create reminders to yourself that will pop up on a designated date and prompt you (or others) to take a certain action. You can also create automatic reminders that will allow you to set reminders based on important company protocol. In addition, Contact Manager allows you to keep a detailed contact history of all conversations or tasks that have transpired, related to a specific event or account. While reminders and history notes can be added from anywhere in the program (if you own this add-in), they can all be easily managed here in Contact Manager.

Objectives:

Upon completing this unit, you will be able to:

- *Find an account using the Incremental Search Tool.*
- *Find an account using the navigation bar.*
- *Find an account using the Account Finder Tool.*

Locating an Existing Account

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.

Using the Incremental Search Tool

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 <u>Search For</u> field, located at the top of the screen, and the program will automatically scroll you to the matching account for the text you type.
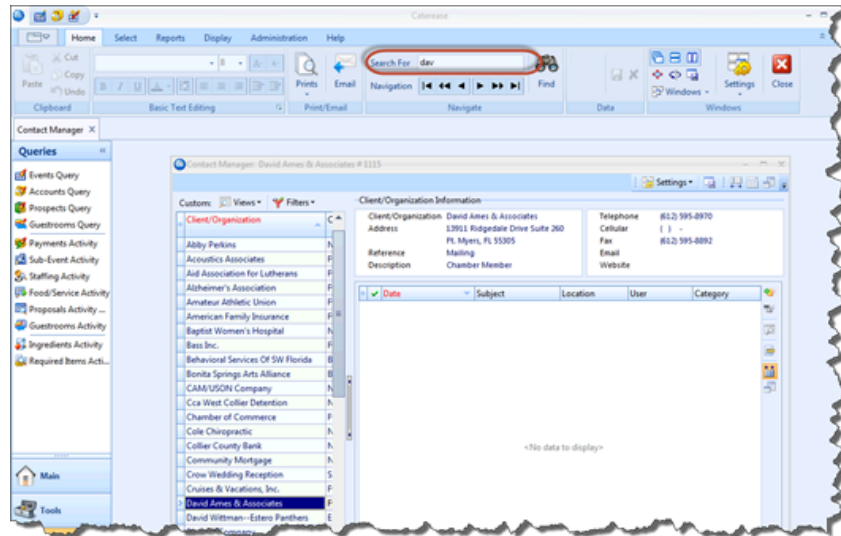
Using the Navigation Bar

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 [⊞] to view the records in grid format.*

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.
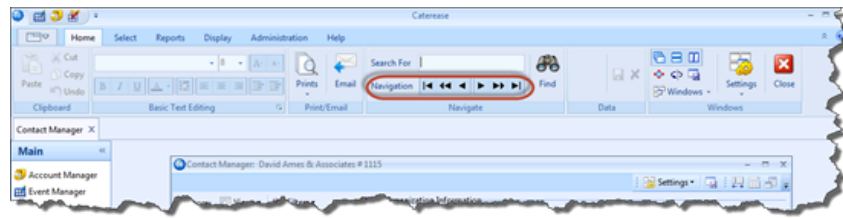
Using the Account Finder Tool

What if you are searching for a customer but only remember the name of the contact person? Or what if you know that the name of the account begins with the letter A, but that's all you remember? 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, located on the main toolbar at the top of your screen.
   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 items from which to choose.

3. In the <u>Search Rules</u> field, select the appropriate rule.

   - **Starts With** – The field you chose in the Search By Fields, above, starts with the words or letter you typed.

   - **Exact Match** – The field you chose in the Search By Fields, 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, above.

   - **Sounds Like** – The words or letters you typed match phonetically to the words in the field you chose in the Search By Fields, above.
     Note: Confirm "Ignore Case" is selected if you do not want to worry about capitalization.

4. **[Optional]** Click the radio button next to <u>And</u> or Or, in the **Multiple Field Operator** section, if you are searching by multiple search criteria.

5. **[Optional]** Click the <u>Include Prefixes</u> 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 fields provided.

6. Click the **Find Records** button, located at the bottom 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.*

8. Once your record is located, click **Close**.
   *Note: Click the **Clear Criteria** button after you have run a search, to clear all results and begin again.*

Unit 2: Creating New Reminders and Contact History Notes

The Reminders tab of Contact Manager lists all reminders for the current account. You can also create a reminder that will automatically prompt a specific user to perform a particular task. Once the task has been dealt with, the reminder can be temporarily dismissed or made inactive.

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. All notes can be managed in Contact Manager and tracked via prints and reports.

Objectives:

Upon completing this unit, you will be able to:

- *Add a new reminder in Contact Manager.*
- *Add a new contact history note in Contact Manager.*
- *Add a new Reminder from Event Manager.*
- *Add a new contact history note from Event Manager.*
- *Create a new automatic reminder from Contact Manager*
- *Create a new automatic reminder from Event Manager.*

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.

2. Click the **Reminders** tab, located at the bottom of the screen.

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 <u>Subject</u> 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 <u>Location</u> to associate with this reminder, or select from the drop-down quickpick list.

- **Label** -- Optionally assign a <u>Label</u> to the reminder by selecting from the quickpick list.

- **Start Date** -- In the first field to the right of <u>Start</u>, 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 <u>Start</u> 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 <u>End</u>, 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.*

- **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 of 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 class 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.

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

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.*

Creating a New Reminder from Event Manager

If you own the Caterease Contact Manager add-in, you can create reminders directly from Event Manager.

Creating a New Reminder from Event Manager

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

2. Click the **New Reminder** button , located at the bottom of the screen.
    Result: The Reminder window opens.

3. Complete the following information in the Reminder fields.

    *   **Subject** -- Type a <u>Subject</u> for this reminder, or click the down arrow to the right of the field to select items from a drop-down quickpick list.

    *   **Label** -- Optionally assign a Label to the reminder by selecting from the quickpick list.

    *   **Start Date** -- In the first field to the right of <u>Start</u>, 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 <u>End</u>, 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 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. Category examples might include "Urgent," "Follow-up," etc.

- **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 quick-pick 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.

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. What's more, you can even use merge fields to dynamically merge 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.

2. Click the **Automatic Reminders Setup** button, located at the bottom right-hand side of the screen.
Result: The Automatic Reminders window opens.
*Note: You may also access this feature from **Administration** > **Options**> **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.

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 Information 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 quickpick list.

   - **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quick-pick 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 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 the checkbox next to **Specific User** and click the down arrow to assign this automatic 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 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.**

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.

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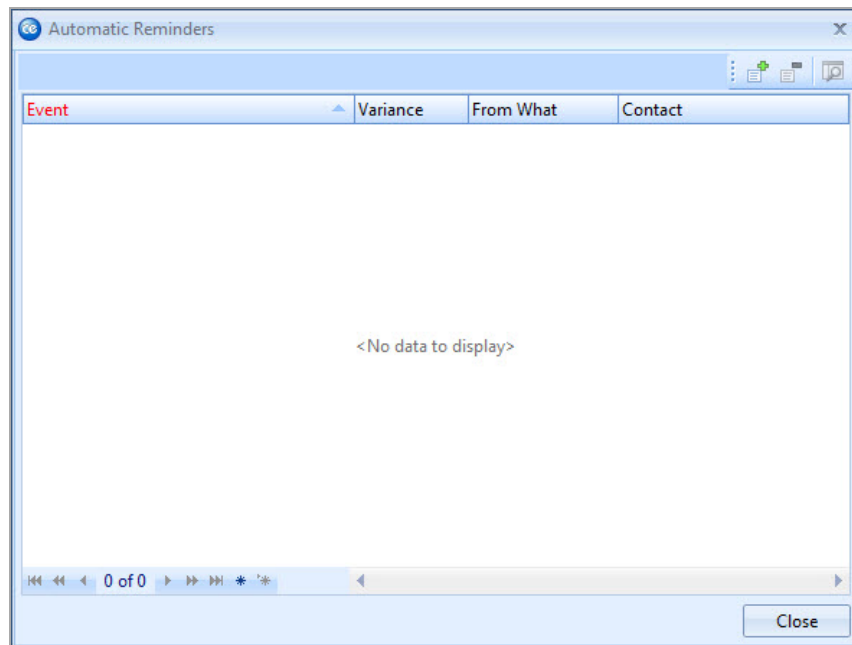
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4. Click the **Add New Auto-Reminder** button , located at the top right-hand side of the window.
   Result: *The Set Auto Reminder window opens.*

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 (i.e., 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 Information 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.

    ● **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).

    ● **Location** -- Type a Location to associate with this reminder, or select from the drop-down quickpick list.

12. **[Optional]** Click 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 the checkbox next to **Specific User** and click the down arrow to assign this automatic 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 then 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.

15. 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 plus sign 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 an 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.
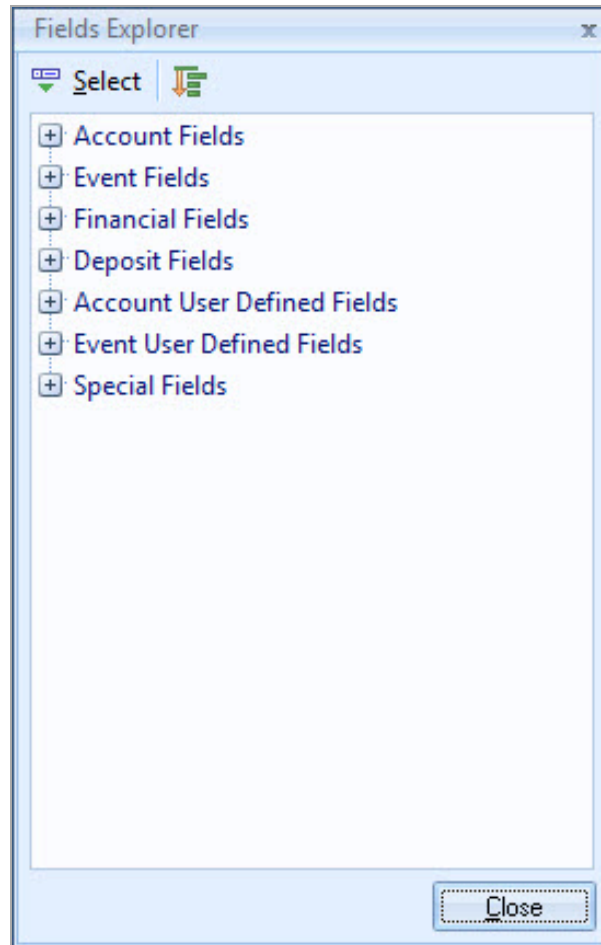
9. Click **OK** on the Set Auto Reminder window.

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

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

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 near the bottom of the Contact Manager screen.

4. Click the **New Contact Item** button , located on the right-hand side of the 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.

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.

   - **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 quickpick list.

   - **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.

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

Creating a New Contact History Note from Event Manager

If you own the Contact Manager add-in, 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.

2. Search for and select the account for which you would like to add a contact history note.

3. Click the **Contact History** tab, located near the bottom of the Event Manager screen.

4. Click the **New Contact History Item** button , located on the right-hand side of the 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.

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.

    - **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 quickpick list.

    - **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.

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

Viewing Contact History and Reminders in Event Manager

Caterease Contact Manager lets you keep track of all contact you have had with your clients, including reminders and contact history notes. Contact Manager features are interwoven throughout Caterease, meaning you are able to view your contact history items directly from Event Manager or Account Manager, without having to open Contact Manager.

Viewing Contact History from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the

Main Caterease sidebar.

2. Search for and select an account.

3. Click the **Reminders & Contact History** button , located at the bottom of the screen, to access the contact history information.
Result: The Contact History & Reminders window opens.

4. Click the **Contact History** tab.

5. Click on the contact history item you would like to view.
*Note: Click the **Current Event Only** checkbox at the top of the window if you only want to see contact history related to the current event.*

6. Click the **View Contact History Comments** button , located on the right-hand side of the screen.
Result: The contact history note will display in black text below its date and time details.
*Note: Click the **View Contact History Comments** button again and the note will close; click the **Save Window Settings** button if you would like the button to remain active.*

7. **[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.

Viewing Reminders from Event Manager

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

2. Search for and select an account.

3. Click the **Reminders & Contact History** button , located at the bottom of the screen, to access the reminder information.
Result: The Contact History & Reminders window opens.

4. Click the **Reminders** tab.

5. Click on the reminder you would like to view.
*Note: Click the **Current Event Only** checkbox at the top of the window if you only want to see reminders related to the current event.*

6. Click the **View Reminder Action Items** button [image], located on the right-hand side of the screen.
    Result: The e-mail note will display in black text below its date and time details.
    *Note: Click the **View Reminder Action Items** button again and the note will close; click the **Save Window Settings** button [image] if you would like the button to remain active.*

7. **[Optional]** Click the **Quick Column Customizing** button [image] 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.

Viewing Sent Emails from Event Manager

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

2. Search for and select an account.

3. Click the **Reminders & Contact History** button [image], located at the bottom of the screen, to access the e-mail information.
    Result: The Contact History & Reminders window opens.

4. Click the **Emails Sent** tab.

5. Click on the e-mail you would like to view/edit.
    *Note: Click the **Current Event Only** checkbox at the top of the window if you only want to see e-mails related to the current event.*

6. Click the **View Email** button [image], 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.

7. Click the **Preview Email Comments** button [image], 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 Window Settings** button* *if you would like the button to remain active.*

8. **[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. The available fields are described below.

Field	Description
Date	The date the contact history item was performed.
Subject	The subject of the contact history item.
Sent To	The recipient's e-mail address
CC	The e-mail of The person who was carbon copied (Cc'd) in the e-mail.
Attachments	The attachment name and type of file.
User	The person who sent the e-mail.
Category	The category of the e-mail; examples might include follow-up, confirmation, etc.
Event #	The event number the e-mail is linked to.
Date	The date the contact history item was performed.
Subject	The subject of the contact history item.

Unit 3: 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.

Objectives:

Upon completing this unit, you will be able to:

- *Print a copy of a custom merge letter or print for a contact.*
- *Edit the document on-the-fly.*
- *E-mail a copy of the document.*

Printing a Letter or Document

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

2. Click the **Merge Documents** button , located at the bottom right-hand side of the screen.

Result: *The Merge Documents window opens.*
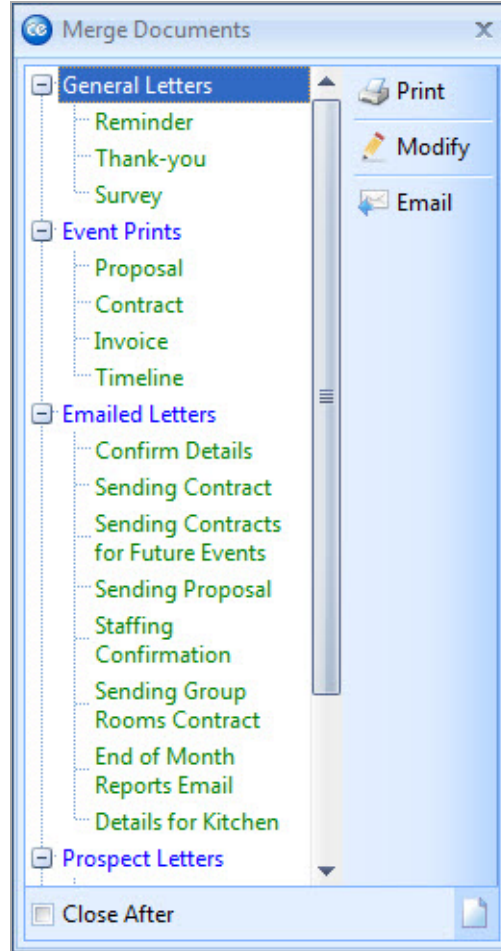
3. Click on the name of the document you would like to print.

4. Click the **Print** button.
   ***Result:*** *The Print Preview screen opens.*
   Note: *You may be prompted to save your changes.*

5. 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

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

2. Click the **Merge Documents** button , located at the bottom of the Contact Manager screen.

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

4. Click the **Modify** button.

5. Edit the document as desired.

6. Click the **Print** button again.

7. Print as described above.
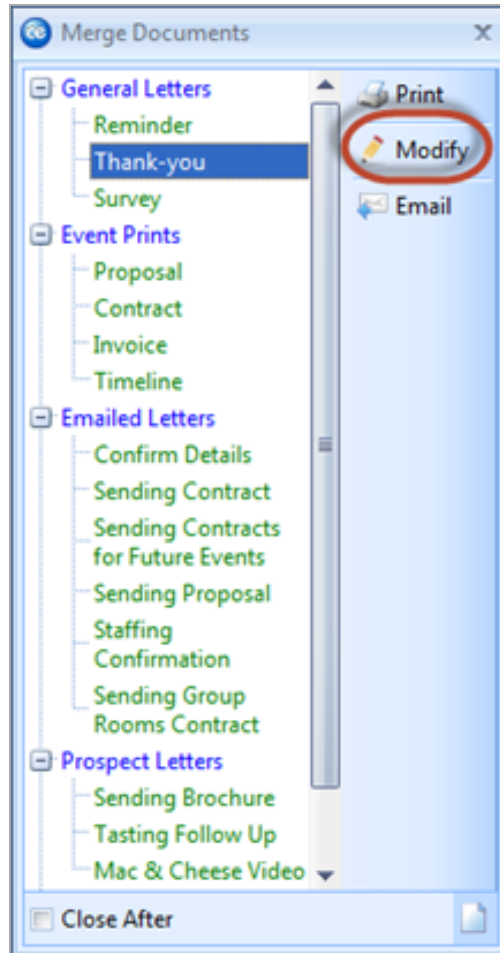
Printing Reminder Lists

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.
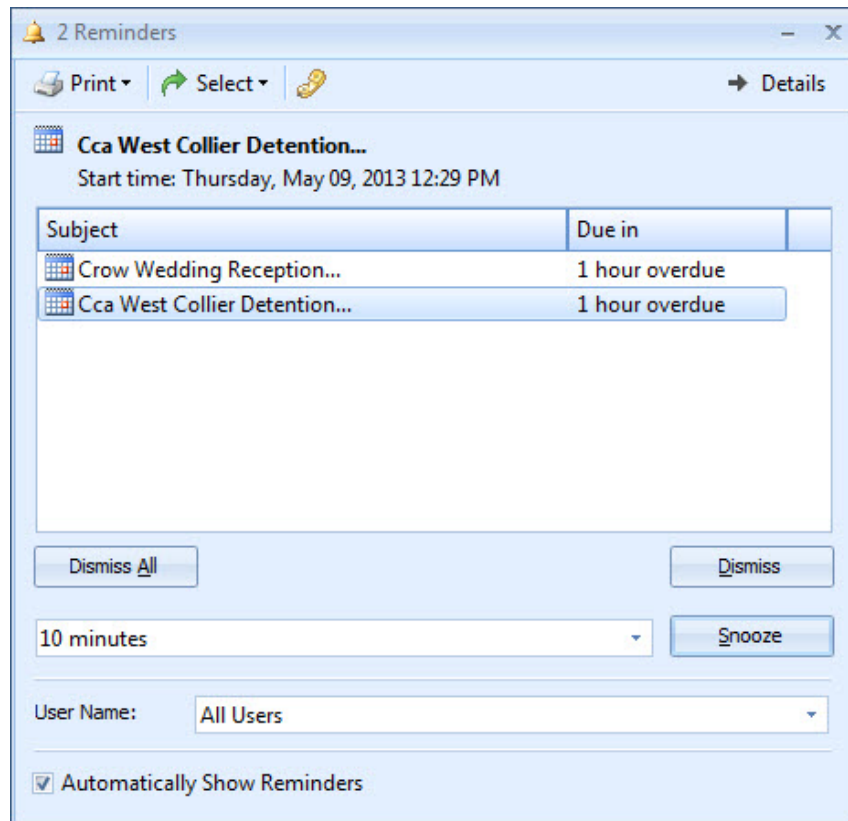
Printing Reminder Lists

1. Click the **Tools** sidebar area.

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 <u>User Name</u> *field.*

3. Click the **Print** button, located on the upper left-hand side of the window.

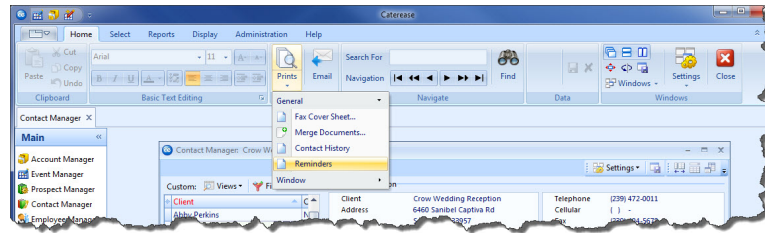4. Click **Active Reminders.**
   Result: A Print Preview screen appears.

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

Printing Reminders 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 a Reminders list.

3. Click the bottom portion of the **Prints** button at the top of the screen.

4. Click **General** and then choose **Reminders**.
Result: A Print Preview screen displays.

5. From the Print Preview screen, click the **Print** button, located on the upper left-hand side of the screen.
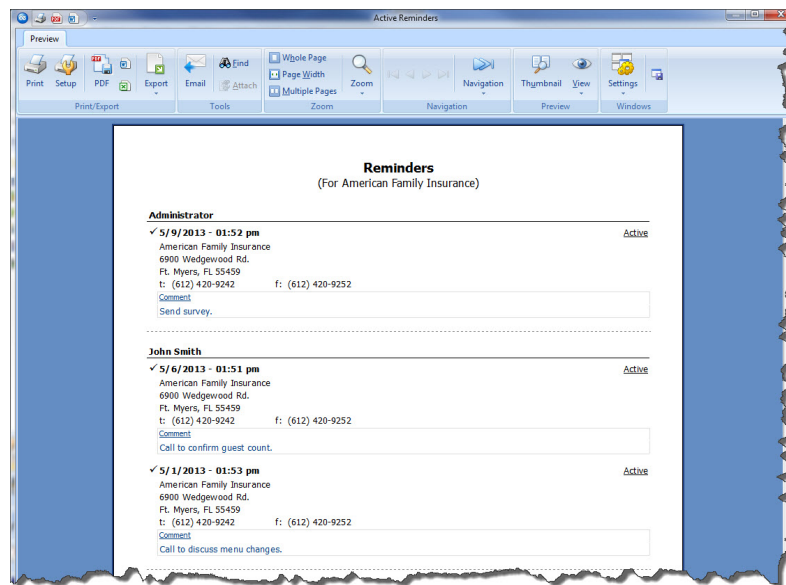
Printing All Reminders for a Day or Date Range

1. Click the **Reports** ribbon tab from the top of your Caterease screen.

2. Click **Contact Manager** 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. **[Optional]** 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.*

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 a Reminders list.

3. Click the bottom portion of the **Prints** button at the top of the screen.

4. Click **General** 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 **Contact Manager** button and choose **Total Contacts Made.**
   Result: The Reminders window opens, where you can set your parameters.
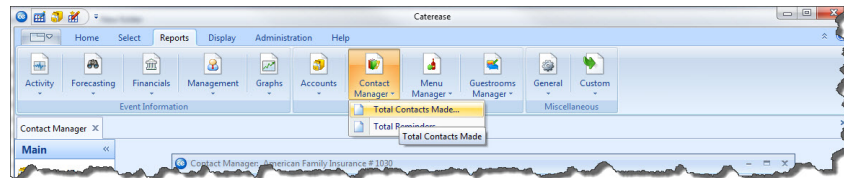
3. Set a Date Range for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.

4. **[Optional]** Change the title of the report by highlighting the words "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**] Optionally include Linked Event Information.

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.
    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.

Managing Your Sent Emails

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.

2. Use the Search tools to find 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 <u>To</u>... 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 <u>Cc</u> field, type the e-mail address of the carbon-copy recipient here (separate multiple recipient addresses by semicolons).

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

7. In the <u>Subject</u> 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 Emails from Contact Manager

1. From Contact Manager, search for and select an account.

2. Click the **Emails Sent** tab, located at the bottom of the 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 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 Email from Contact Manager

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

2. Click the **Emails Sent** tab, located at the bottom of the screen.

3. Click on the e-mail you would like to re-send.

4. 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.

5. Click **OK**.
Result: The Email window opens.

6. 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.

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

Unit 4: Customizing Your Contact Manager

You can quickly and easily customize your Contact Manager by creating quickpick lists and customizing the Contact Manager grid.

Objectives:

Upon completing this unit, you will be able to:

- *Add quickpick list items to the Reminder fields.*
- *Add quickpick list items to the Contact History fields.*
- *Manipulate the Contact Manager grid to display desired information.*

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**

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

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 expand the selection.

4. Click on **Reminder Category** to add a quickpick item.

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**.
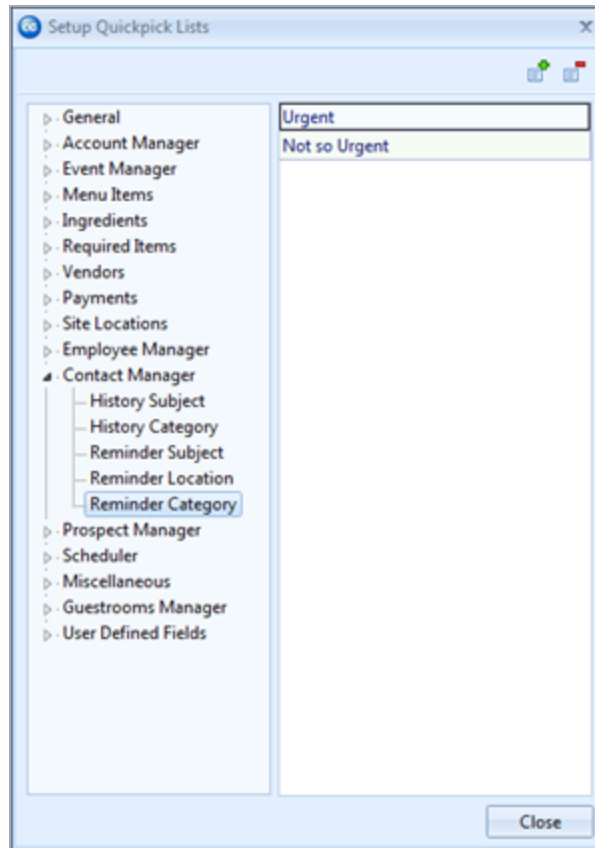
Adding Quickpick Items to the History Category Field

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 expand the category.

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, click **Close**.
   Note: Quickpicks for Reminder Subject, Reminder Location, and Reminder Category are added in the same way as described above.
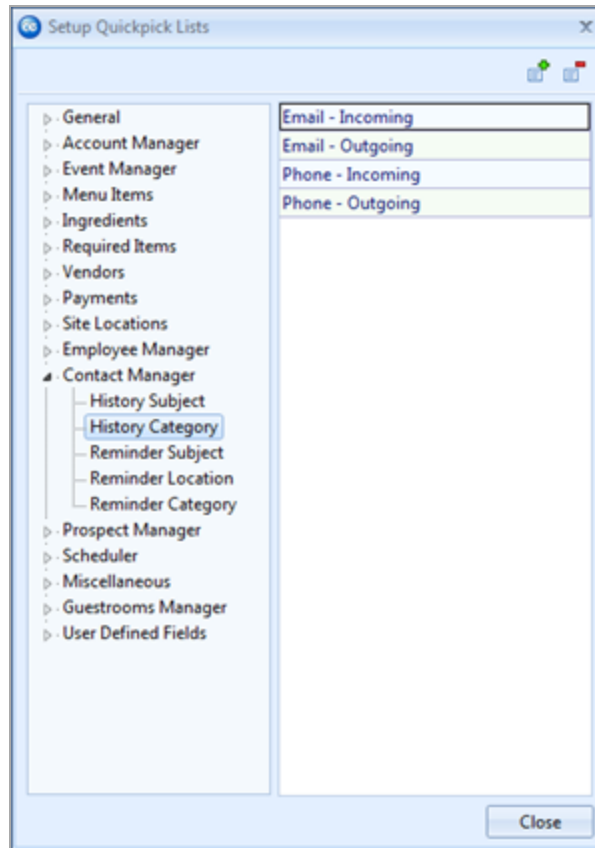
Deleting a Quickpick Item

1. Click on the quickpick item you would like to remove from any of your quick-pick lists.

2. Click the **Delete Current Record** button [icon], 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 high-lighted 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, you can customize the grid to suit your preferences.

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. In the drop-down list, click into a blank box to leave a check mark to display that field information in the details grid.

2. Click the **Quick Column Customizing** button again to close the drop-down list.

3. Establish any desired Views and Filters.

4. When finished, click the **Display Full Grid** button again.
    Result: The Contact Manager screen returns to its original split-screen lay-out.

5. Click the **Display Full Grid** button , located at the top right-hand side of the screen.
    Result: Your entire 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.

6. Manipulate the detail grid by adding, removing, or rearranging columns, or sorting and grouping records.

7. Click the **Quick Column Customizing** button , located at the upper left-hand side of the Contact Manager screen.

Unit 5: Viewing and Managing Active Reminders

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.

Objective:

Upon completing this unit, you will be able to:

- *View your active reminders using the Active Reminders Tool.*
- *Retrieve linked reminders into other Managers.*
- *Snooze and dismiss reminders.*
- *Make a reminder inactive*
- *View reminders in the Scheduler.*

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 of for individual users by clicking the down arrow to the right of the <u>User Name</u> *field.*

3. Click any reminder on the Reminders form.

4. **[Optional]** Click the **Details** button to view extended details about the reminder.
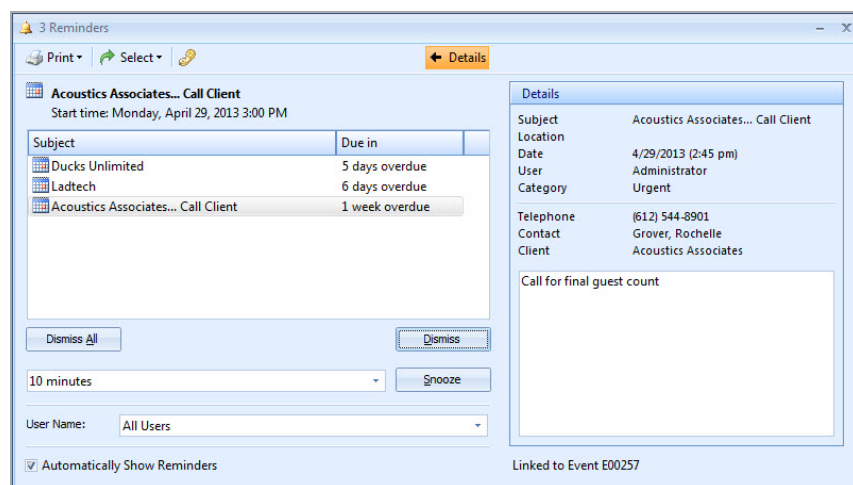
5. **[Optional]** Snooze or dismiss the reminder.
    Note: You may also retrieve the reminder into a Manager.

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 at the bottom of the 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.

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 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 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 form.
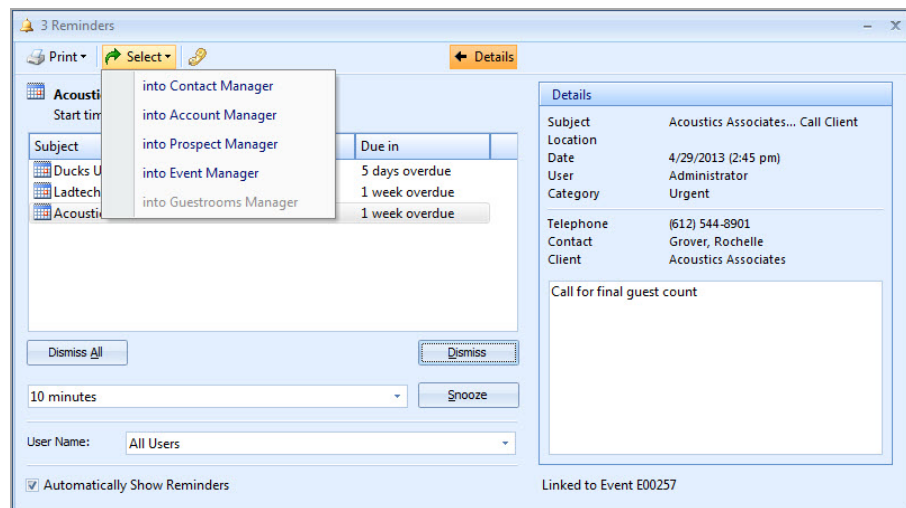
4. Choose which Manager you would like to associate with the reminder.
   Note: You will be prompted to confirm your choice:

   - **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 options 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 options 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.

Snoozing and Dismissing a Reminder

You can set reminders and then determine how long before an action the reminder message will appear. When, 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 **Tools** sidebar item on the left-hand side of your screen.

2. Click the **Active Reminders** button.
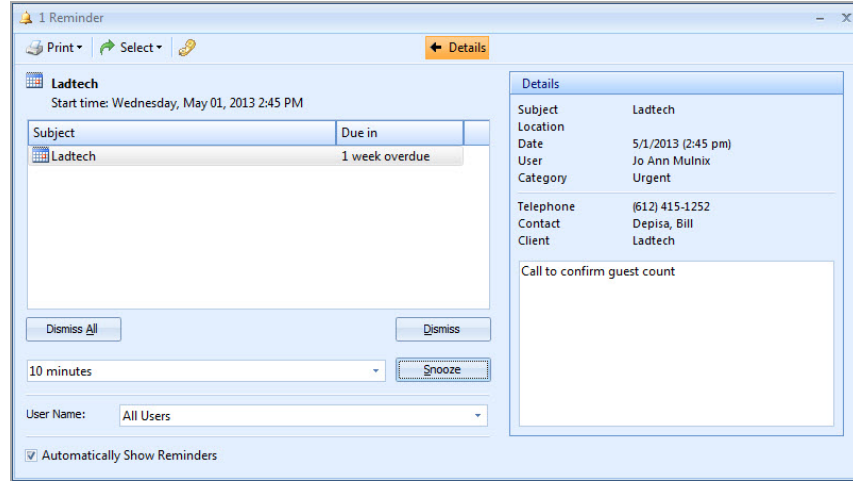*Result: The Reminder window opens.*
Note: If you are logged in as Administrator, you can decide to see reminders for all users or for individual users.

3. Click any reminder in the Reminders window to select it.

4. 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.*

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 any reminder in 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 therefore removed from the Reminders window.*

   ***Note**: Click the **Create Contact History Item on Dismiss** button prior to clicking **Dismiss/Dismiss All** if you would like to create a contact history*

note.
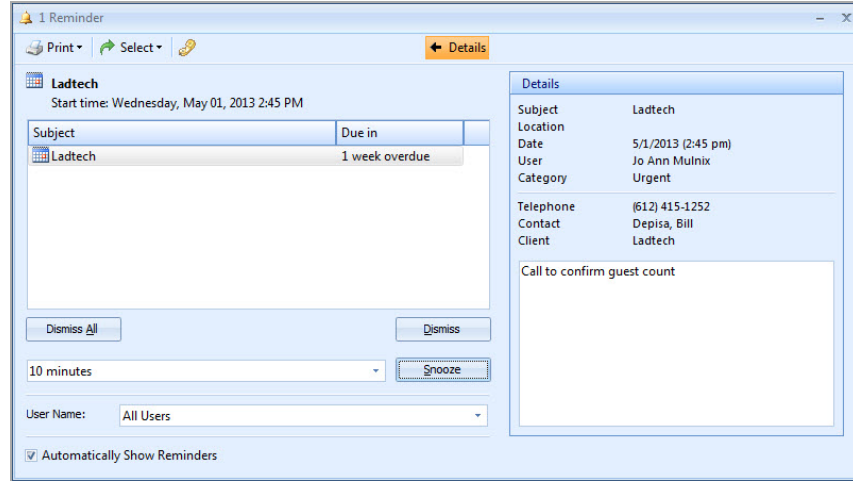
Viewing Reminders in the Scheduler

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.

1. Click the **Scheduler** button from the **Main** sidebar group.

2. Click the **Display** button from the middle of the Scheduler window 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.
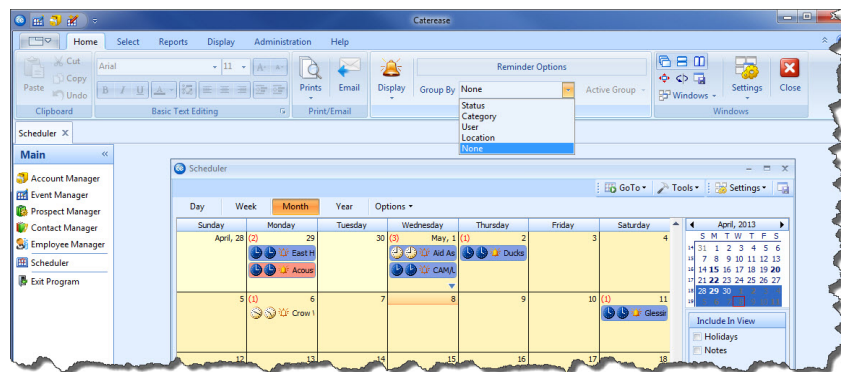
4. **[Optional]** Export or synchronize your reminders.

Exporting and Synchronizing Events and 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.

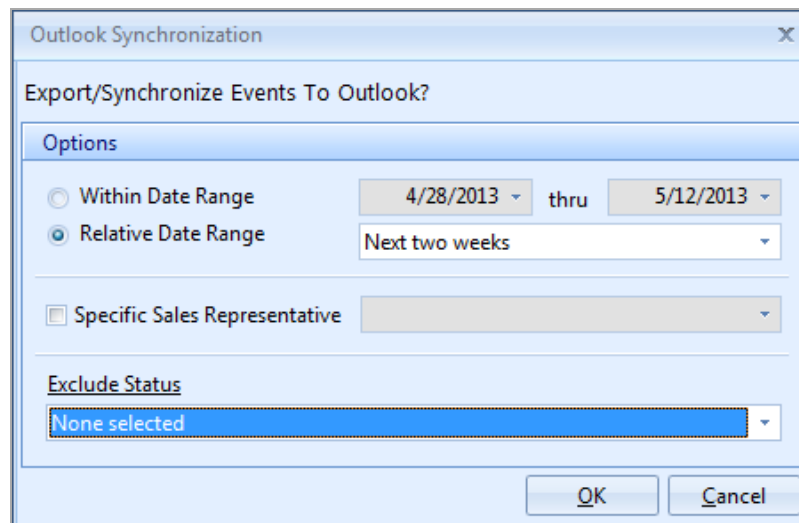**Exporting and Synchronizing Events in Outlook**

1. From the Scheduler, select **Events** from the **Display** drop-down list, located at the top of your screen.

2. Right-click anywhere on the Scheduler screen and select **Export/Synchronize to Outlook**.
   Result: The Outlook Synchronization window opens.
   *Note: You also have the option of synchronizing **from** Outlook. Simply choose **Synchronize From Outlook**.*

3. Choose to export within a date range or a relative date range.

4. **[Optional]** To export for a particular user, click the checkbox to the left of Specific Sales Representative and select the user's name from the drop-down list.

5. **[Optional]** Click the down arrow to the right of the Exclude Status field and click into the checkboxes of the status or statuses you would like to exclude from the export/synchronization.

6. When finished making your selections, click **OK**.
   *Result: An information prompt appears, indicating the events have been exported to Outlook.*

Exporting/Synchronizing a Single Reminder in Outlook

1. Click the **Scheduler** button on the **Main** sidebar group.

2. Click the **Display** button from the middle of the Scheduler window 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.*
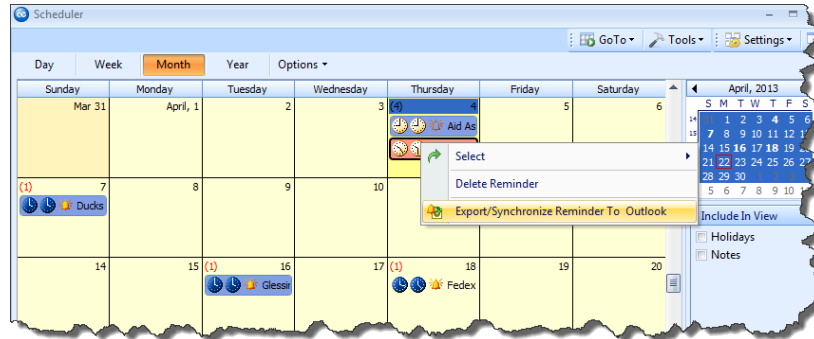
4. Click **Yes** to confirm.
Result: A second confirmation prompt appears.

5. Click **OK**.

Exporting/Synchronizing Multiple Reminders in Outlook

1. From the Reminders display, right-click anywhere on the Scheduler screen and select **Export/Synchronize to Outlook**.
Result: The Outlook Synchronization window opens.
*Note: You also have the option of synchronizing **from** Outlook; simply choose **Synchronize From Outlook**.*

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 information prompt appears, indicating the reminders have been

exported to Outlook.
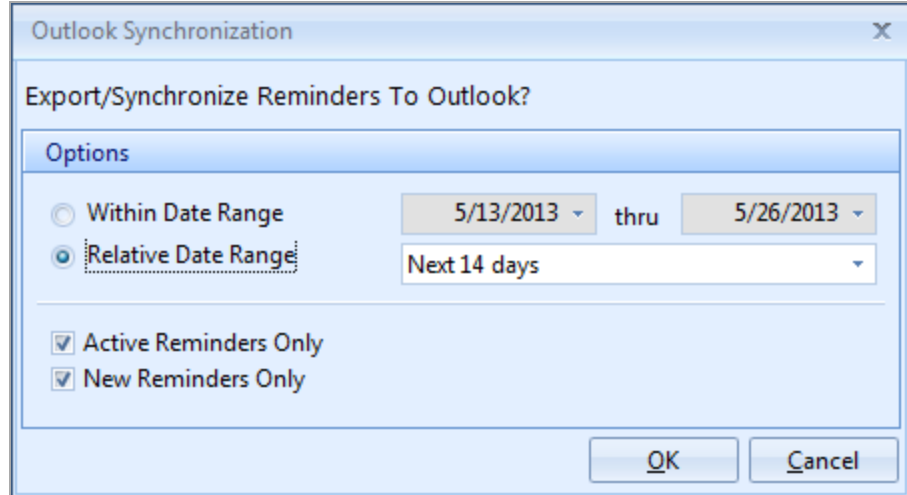
caterease™

catering & event management software

a product of
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