

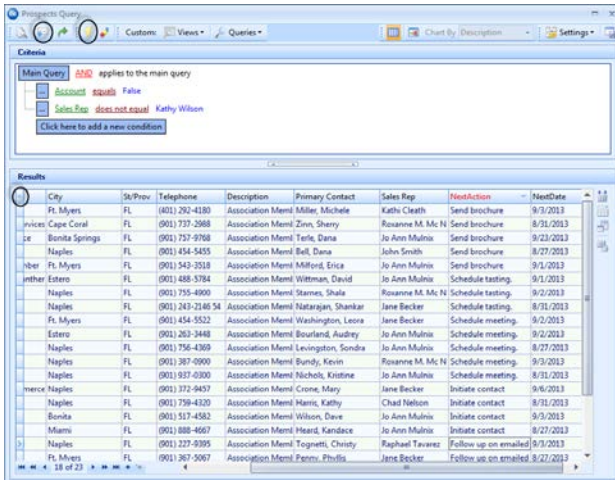


Send Batch E-mails (Professional Version)

1. Click the **Prospects Query** button from the **Queries** sidebar.
2. Click the **Click here to add a new condition** button.
3. Click the down arrow to the right of the <empty> field and select **False**.
4. Click the **Click here to add a new condition** button to further filter your results, if desired.
5. Click the lightning bolt icon  to generate the query.
6. Click the **Quick Column Customizing** button  to see fields such as Next Action, Next Date, or Status.
7. Highlight the names, in the grid, of all of the prospects you would like to send an e-mail to.
8. Click the **E-mail** button, located on the upper left-hand side of the window.
9. Type a Subject into the Subject field or select an option from the drop-down quick-pick list.
10. Attach any desired files or prints.
11. Type the body of the e-mail into the large text block, or select a custom merge letter (if you own Marketing Tools).
12. Click **Send**.



The screenshot shows the 'Prospects Query' window in CaterEase. The 'Criteria' section shows a query: 'Main Query' with conditions 'Account equals False' and 'Sales Rep does not equal Kathy Wilson'. The 'Results' section displays a table with columns: City, St/Prov, Telephone, Description, Primary Contact, Sales Rep, Next Action, and Next Date. The table lists various prospects and their associated sales reps and next actions.

City	St/Prov	Telephone	Description	Primary Contact	Sales Rep	Next Action	Next Date
FL Myers	FL	(801) 262-4100	Association Mem	Miler, Michele	Kathy Cleath	Send brochure	9/9/2013
FL Myers	FL	(901) 737-5988	Association Mem	Zinn, Sherry	Rosanne M. Mc N	Send brochure	9/25/2013
FL Myers	FL	(901) 757-9768	Association Mem	Terle, Dana	Jo Ann Mulnix	Send brochure	9/23/2013
FL Myers	FL	(801) 454-5455	Association Mem	Bell, Dana	John Smith	Send brochure	8/27/2013
FL Myers	FL	(901) 543-3518	Association Mem	Milford, Erica	Jo Ann Mulnix	Send brochure	9/1/2013
FL Myers	FL	(901) 488-5784	Association Mem	Wittman, David	Jo Ann Mulnix	Schedule tasting	9/1/2013
FL Myers	FL	(901) 755-4900	Association Mem	Starnes, Shale	Rosanne M. Mc N	Schedule tasting	9/2/2013
FL Myers	FL	(901) 243-2140 54	Association Mem	Natarajan, Shankar	Jane Becker	Schedule tasting	8/31/2013
FL Myers	FL	(901) 454-8522	Association Mem	Washington, Lena	Jane Becker	Schedule meeting	9/2/2013
FL Myers	FL	(901) 263-3448	Association Mem	Bourland, Audrey	Jo Ann Mulnix	Schedule meeting	9/2/2013
FL Myers	FL	(901) 756-4369	Association Mem	Levington, Sondra	Jo Ann Mulnix	Schedule meeting	8/27/2013
FL Myers	FL	(901) 367-0900	Association Mem	Bundy, Kevin	Rosanne M. Mc N	Schedule meeting	9/3/2013
FL Myers	FL	(901) 937-0300	Association Mem	Nichols, Kristine	Jo Ann Mulnix	Schedule meeting	8/31/2013
FL Myers	FL	(901) 372-9457	Association Mem	Crone, Mary	Jane Becker	Initiate contact	9/6/2013
FL Myers	FL	(901) 759-4320	Association Mem	Harris, Kathy	Chad Nelson	Initiate contact	8/31/2013
FL Myers	FL	(901) 317-4563	Association Mem	Wilson, Dave	Jo Ann Mulnix	Initiate contact	9/3/2013
FL Myers	FL	(901) 888-4667	Association Mem	Heard, Kandace	Jo Ann Mulnix	Initiate contact	9/27/2013
FL Myers	FL	(901) 227-9395	Association Mem	Tognetti, Christy	Raphael Taveraz	Follow up on emailed	9/3/2013
FL Myers	FL	(901) 367-3067	Association Mem	Pennix, Phyllis	Jane Becker	Follow up on emailed	8/22/2013

Additional Resources

[Generating the Proposals Activity Query](#)
[Editing Miscellaneous Prints](#)
[Searching for Prospects](#)
[Changing a Prospect into an Active Account](#)
[Adding a New Prospect Manager Proposal](#)
[Editing New Booking Defaults for Prospect Manager](#)
[Adding Contact People to a Prospective Lead](#)
[Prospect Manager User Guide](#)

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catering & event management software

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Quick Reference Guide:

Prospect Manager



800.863.1616
www.caterease.com

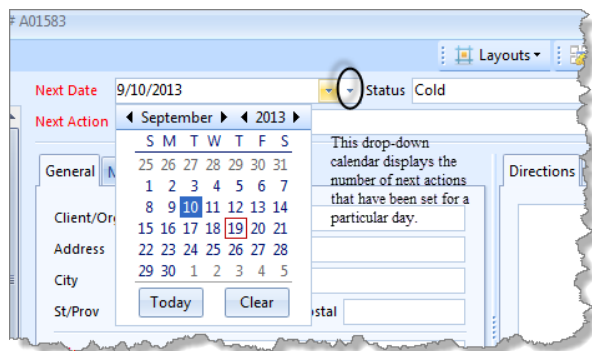
Add a New Prospect

1. Click the **Prospect Manager** button from the **Main** sidebar.
2. Click the **Add Record** button , located toward the top right-hand side of the window.
3. Complete the contact information on the **General** and **Miscellaneous** tabs.
4. Add a contact person by clicking the **Add a New Contact** button , on the **Contacts** tab, located on the lower right-hand side of the screen.

See [Adding a New Prospect in Prospect Manager](#).



Select a Next Action, Next Action Date, and Status

1. Click the down arrow to the right of the **Next Date** field, located towards the top of the screen, and select a next-action date from the drop-down calendar.
Note: Two calendars are available; one displays traditional dates and the other displays the number of next actions that have been set for a particular day.
2. Click the down arrow to the right of the **Next Action** field to select an option from the drop-down quick-pick list.
Note: Quick-pick lists are customized in **Setup > Quickpicks > Prospect Manager**.
3. Click the down arrow to the right of the **Status** field to select the prospect's status from the drop-down quick-pick list.




See [Creating Next Actions and Action Dates](#).

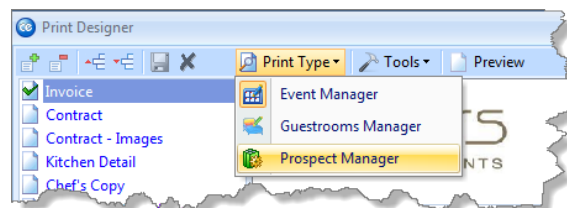
Create a Proposal

1. Click the **Proposal** tab, located towards the bottom of the screen.
2. Click the **Add a New Proposal** button , located on the right-hand side of the screen.
3. Fill out the proposed event details on the **General** and **Miscellaneous** tabs.
4. Click the **Details** button.
5. From the **Food/Service** tab, click the **Display Menus** button  to select menu items.
6. Click the **Comments** tab and type any desired comments into the text block.
7. When finished, click **OK**.

See [Creating a Prospect Proposal](#).

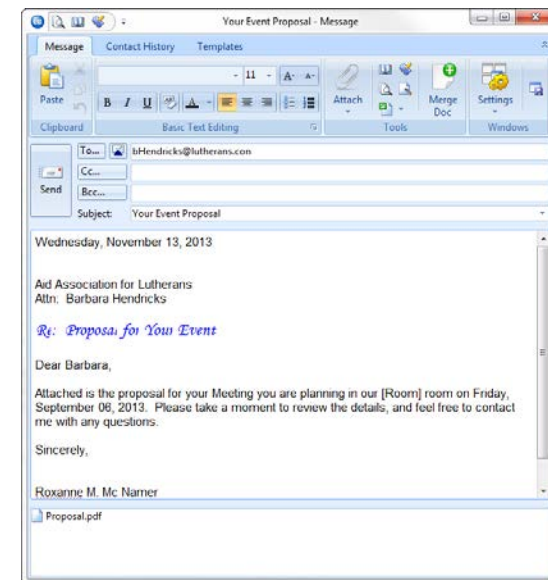
Use the Print Designer to Create a Proposal Print

1. Click the **Print Designer** button, located on the **Setup** sidebar.
2. Click the **Print Type** button, located at the top of the screen, and select **Prospect Manager**.
3. Click the **Add Print** button , located on the upper left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for the new proposal, and press **[Enter]**.
6. Click the **Edit Header** button to insert logos, merge fields, and a URL.
7. Customize the fields that should display on the print by clicking the down arrows to the right of a field and choosing another option.
8. Click into the checkbox next to any area you would like to suppress.
9. Click the **Preview** button, located at the top of the screen, to preview the print.
Note: Your Prospect Manager should be open, with the proposed event in the background.




E-mail a Proposal

1. Search for and select a record in Prospect Manager.
2. Click the **Email** button at the top of the screen.
3. Click **Attach > Print**.
4. Click into the Proposal checkbox, located under Event Prints, and click **OK**. The PDF attachment will be visible at the bottom of the window.
5. Type a subject or select an option from the drop-down quick-pick list.
6. Type the body of the e-mail or select a custom merge letter (if you own the Marketing Tools add-in).
7. Press **Send**.



See [Sending Emails from Prospect Manager](#).

Convert the Proposal to an Event

1. Click the **Proposals** tab in Prospect Manager.
2. Highlight, in the grid, the proposal you would like to convert to an event.
3. Click the **Create Event from Proposal** button , located on the right-hand side of the screen.
4. Click **Yes** at the confirmation prompt. You will be taken to the Event Wizard, where you can add or edit event details as needed.

See [Creating an Event from a Proposal](#).