

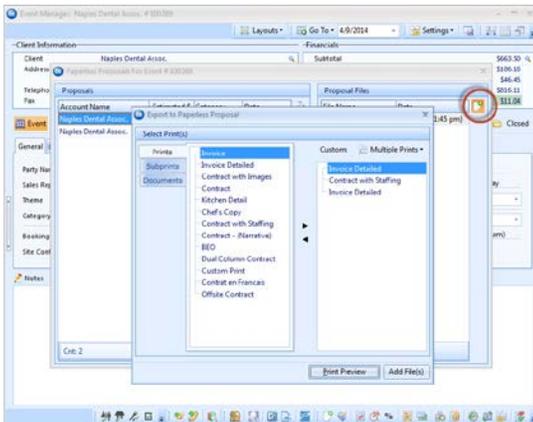
## Completing the Proposal

### Navigate Through the Tabs

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 email 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.

### 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**<sup>™</sup>  
catering & event management software

a product of  
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**caterease**<sup>™</sup>  
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## Quick Reference Guide:

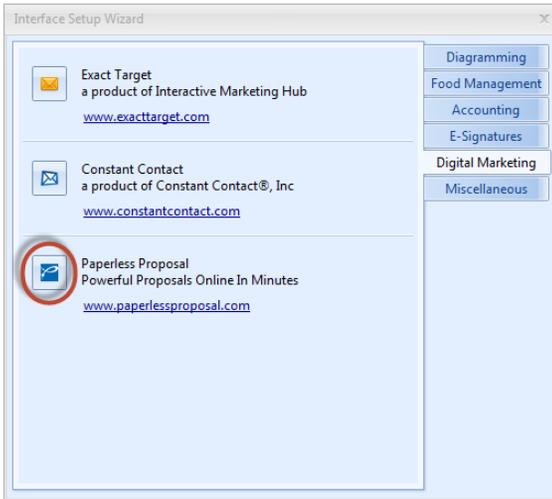
## Paperless Proposal



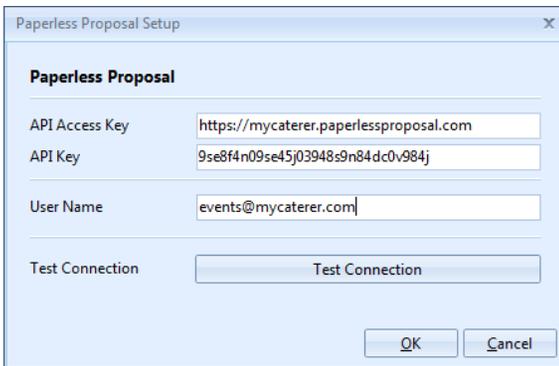
800.863.1616  
[www.caterease.com](http://www.caterease.com)

## 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 Wizard Setup**.
3. Click the **Paperless Proposal** button, located on the **Digital Marketing** tab.

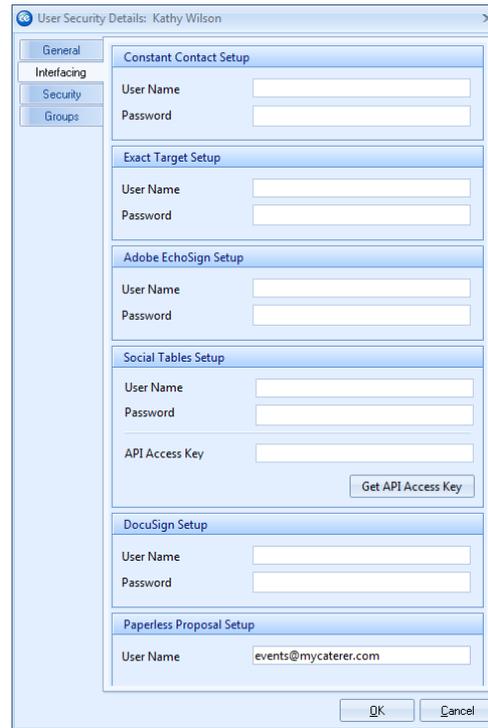


4. Enter the API Access Key and the API Key (provided by Paperless Proposal) into the fields provided.
5. Enter the user name into the User Name field, and then click **Test Connection**.
6. Click **OK** at the informational prompt, and then click **OK** again to close the window.



## Assign Individual Logins to Caterease Users

1. Click the **Administration** ribbon tab, located at the top of your screen and click the **Security** button.
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 User Name field under the **Paperless Proposal Setup** area.



## Access Paperless Proposal in Event Manager

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



## 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.

