CaterX

CaterX is a revolutionary catering, facility, banquet and event management software that will become your most trusted and detail oriented employee! CaterX powered by Sage SalesLogix is easy to use, yet combines the most powerful CRM tools with customized capabilities that will manage every aspect of your catering business. No detail is overlooked! From sales, to staffing, room availability, menu items, inventory, reports, work orders, quotes, contracts, accounts receivable, etc. CaterX will have you covered. No more manually calculating food requirements, staffing levels, profit margins, etc. CaterX has been designed by a 30 year catering veteran with an engineering background who knows every fine detail of your business. CaterX will become the dominant source to move your business forward, become more profitable and increase customer satisfaction and loyalty. No other software will manage your catering and banquet business like CaterX.

CaterX Features

Events:

Create a New Event

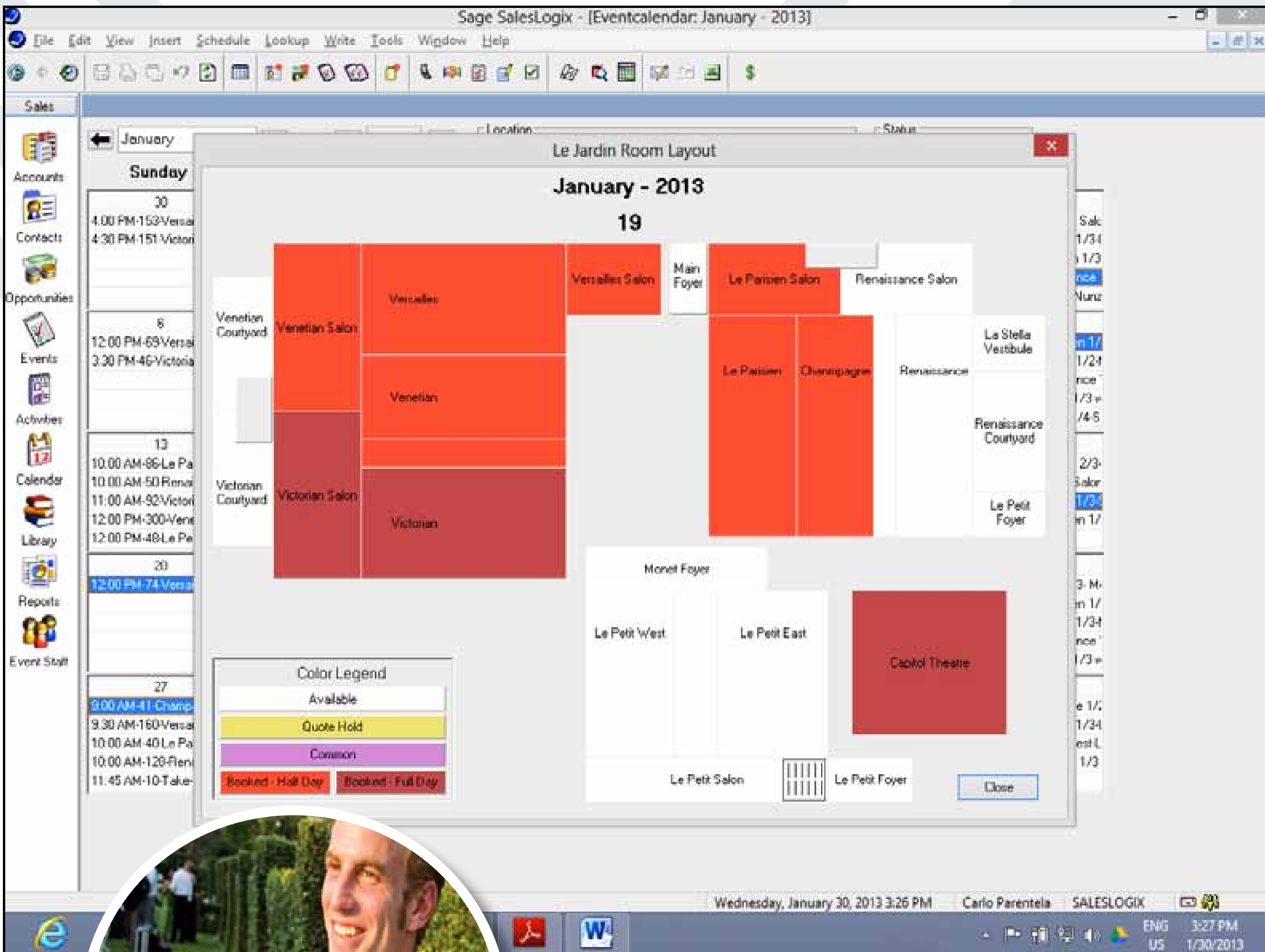
CaterX allows you to quickly and easily create a customized event. Simply follow the preset tabs to enter all relevant information to create any event. It's that easy! CaterX also allows you to assign security levels and manage who can approve or overide event details.

Look Up an Event

CaterX has a power search option that allows you to search existing events by any word or phrase saving time and steps. If you can't recall any keywords, CaterX still allows you to easily search out events by using other options. i.e. drop down Calendar, Event # or Event Name or from the Account/Contact.

Search Room Availability

Search for room availability according the guest's requirements. i.e. number of guests, configuration (i.e. dinner dance, boardroom, etc.) time period and day of week. Example, minimum 250 persons, Classroom style, any Tuesday or Thursday from July 1 to Aug. 15.

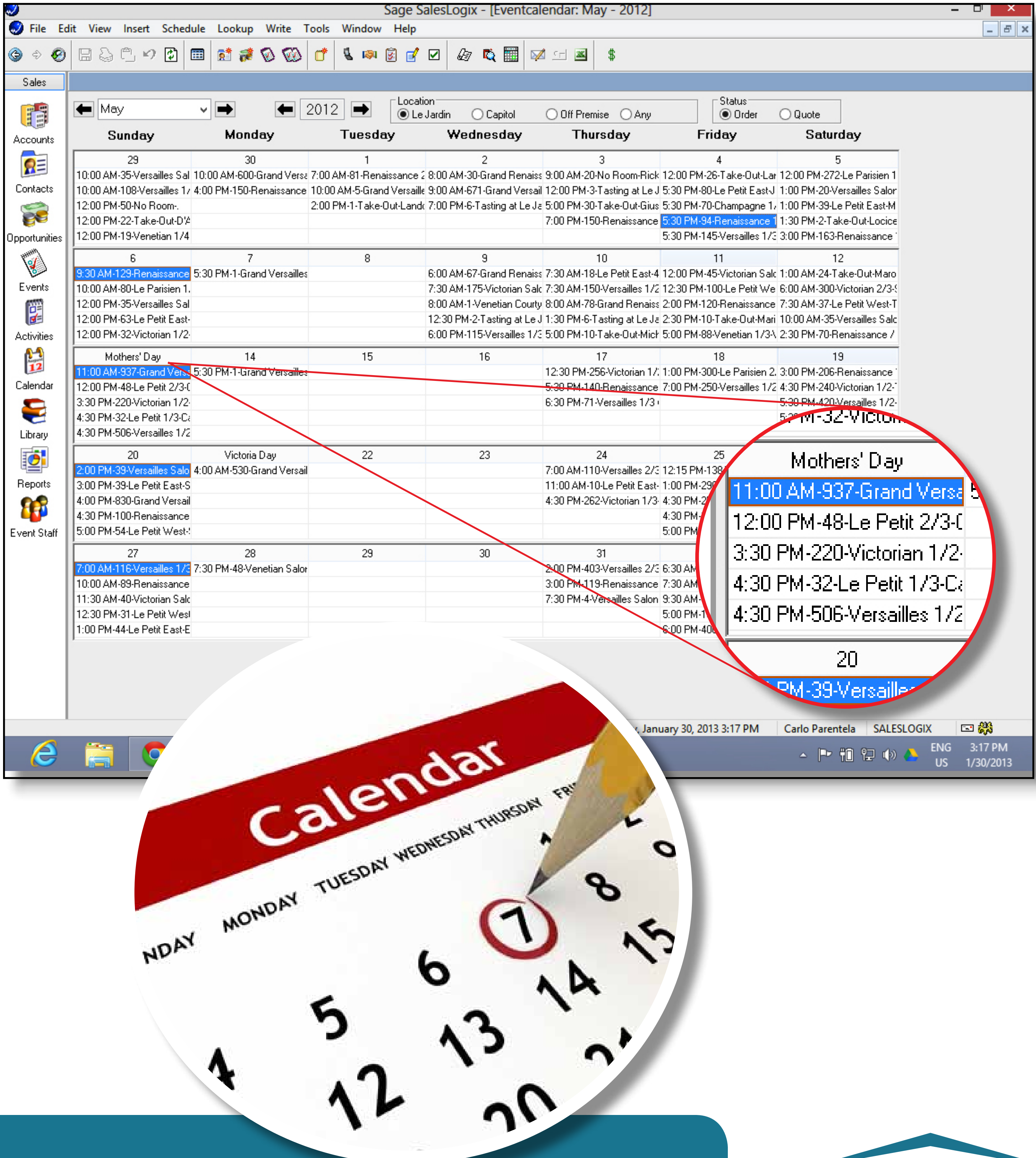


Event Calendar

Stay on top of your current business by viewing the calendar of events with a simple click. CaterX allows you to view events booked, quoted and held at a glance using a calendar layout. Click on any event in the calendar to go directly to that event.

Manage Special Days

Flag "Special Days" on your Event Calendar, i.e. Valentine's Day, New Year's Eve, Mother's Day, etc.



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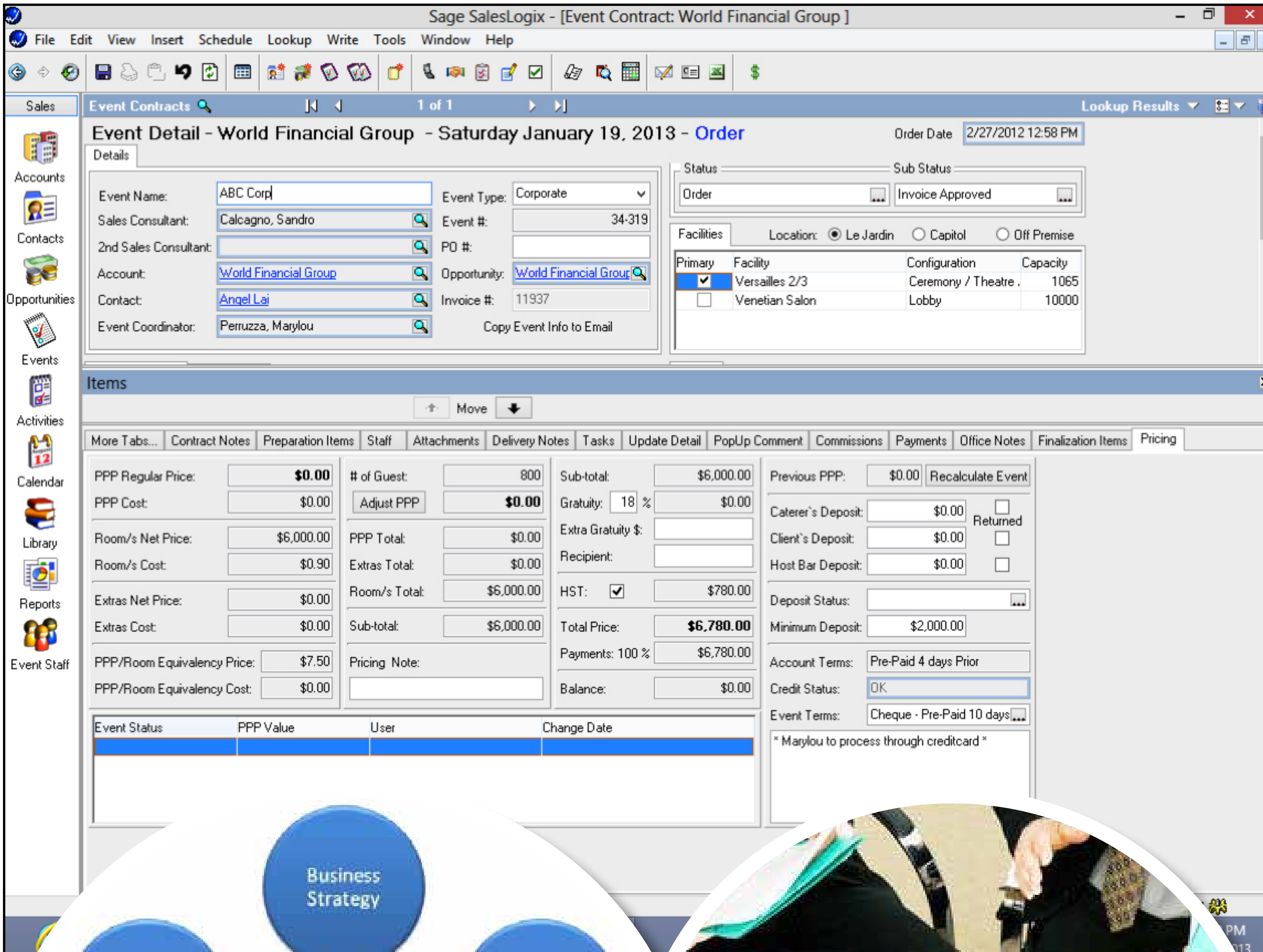
Event Item Specific Details

Pricing

CaterX provides a full overview of costing and revenue for each event. Easily look at details such as deposit, taxes, room charges, cost per person, event rates, gratuity, total revenue, etc. CaterX also flags accounts based on credit status and payment history.



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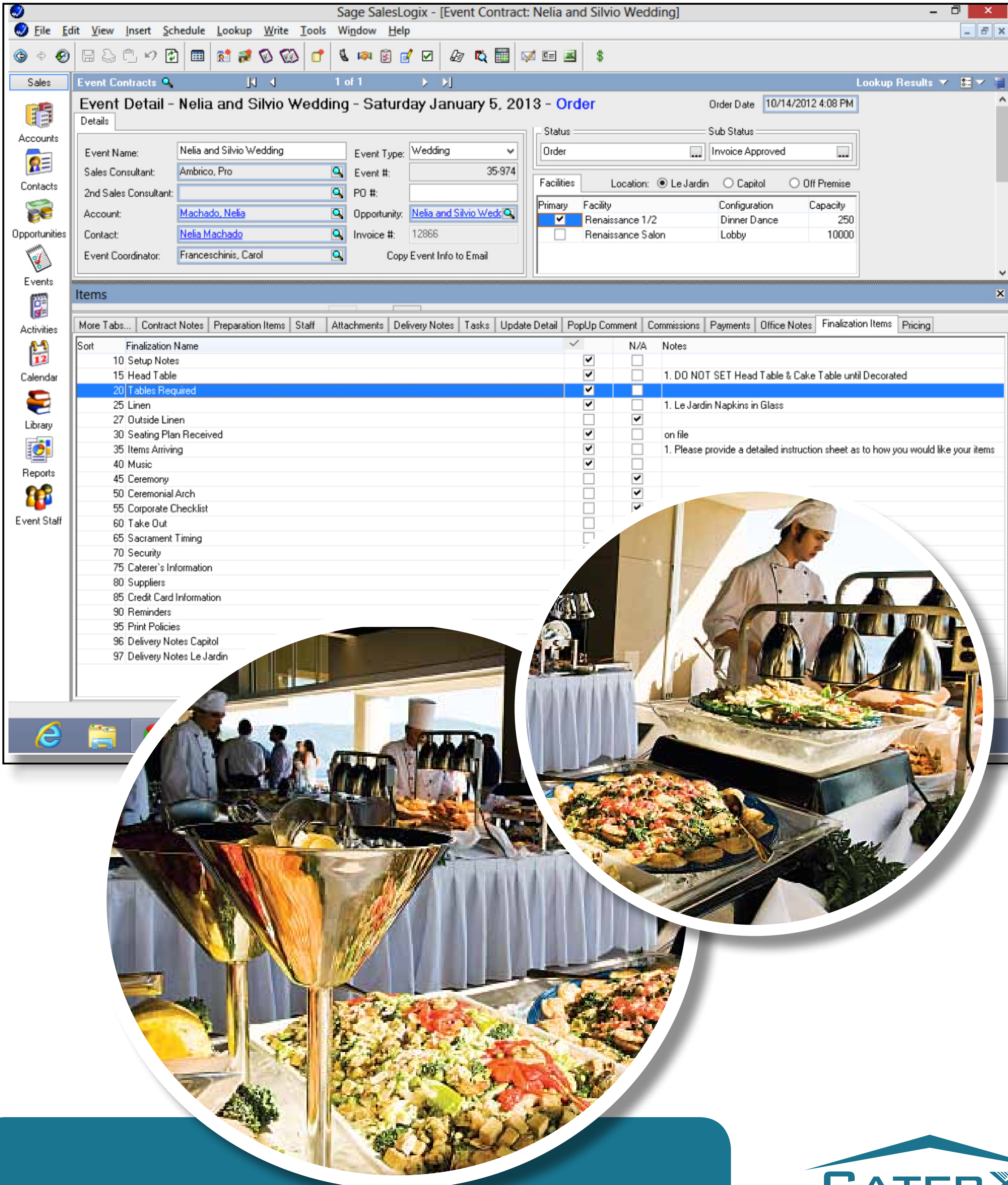
Finalization Items

No other catering software in the market allows you to manage an event like CaterX. Finalization items allow event coordinators and staff to review fine details internally and externally with clients to ensure no small detail is overlooked using pre-determined questions. Examples can include: number of tables in receiving line, type of table covering, podiums, mics, room and table configuration, etc. Quickly print a report to see what items have not been finalized on each event for the chosen time period. The fastest way to manage your Event Coordinators.



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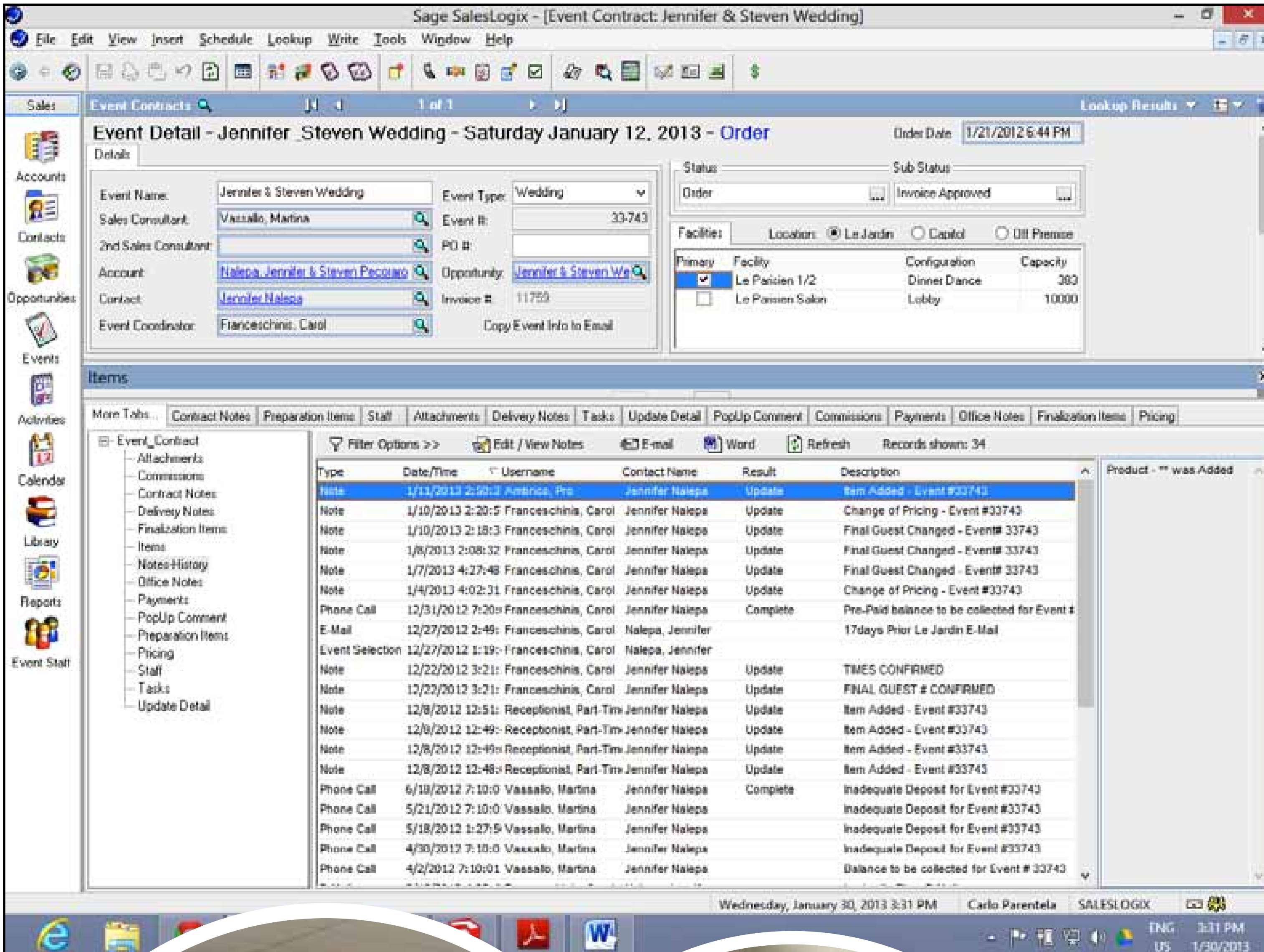
Notes History

CaterX will track and log all activity related to an event. For example any changes, additions or deletions are listed along with details of time and person who made the change. This is a great tool to refer to in the event of lost information. A complete audit trail.



Payments:

Easily enter a payment (cash, credit card, cheque) into any event and have this data carry forward to key summaries. Details such as cheque number, name, card type, date, etc can be viewed by any staff member with designated access. All payments are managed by a Manager so that all monies received are verified and posted once confirmed. Tight money security!

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Commissions
Allocating commissions has never been easier. CaterX allows you to formulate how much commission (percentage or value) is to be paid out to sales staff and can be individualized by type of event and specific Menu Item.

PopUp Comment
Generate alerts to notify office staff of important details. i.e. surprise party or some important detail that must be stated before anyone enters the Event Order.

Tasks
Quickly assign a task to a specific individual using the task tab. By entering a job responsibility, date and notes, that individual will have a clear understanding of the expectations and time requirements.

Attachments
CaterX allows you to scan and attach key documents such as copies of signed contracts, floor plans, etc to any event and have it accessed by any staff member. Resolve disputes or quickly answer questions by opening scanned copies of contracts and quotes at any time.

Auto Processes
Never miss an important task or event again. CaterX can be programmed to automatically send out reminder emails, schedule phone calls or create alerts at strategic times you predetermine. A great benefit for sales and coordination.

Event Staff

CaterX not only manages your staff, it actually automatically schedules them for you based on a set of rules that you have pre-setup.

Create a New Staff

Create a record for new employees with detail including, address and contact details, geographical work availability, notes, job function capability and schedule availability.

Look Up Active Staff

Manage details of all staff that are currently employed by your organization, such as; which facility they work at, their weekly availability, scheduled days off, type of jobs they do (ie. waiter, bartender, setup, etc.) and past and future schedules.

Manage Staffing Rules

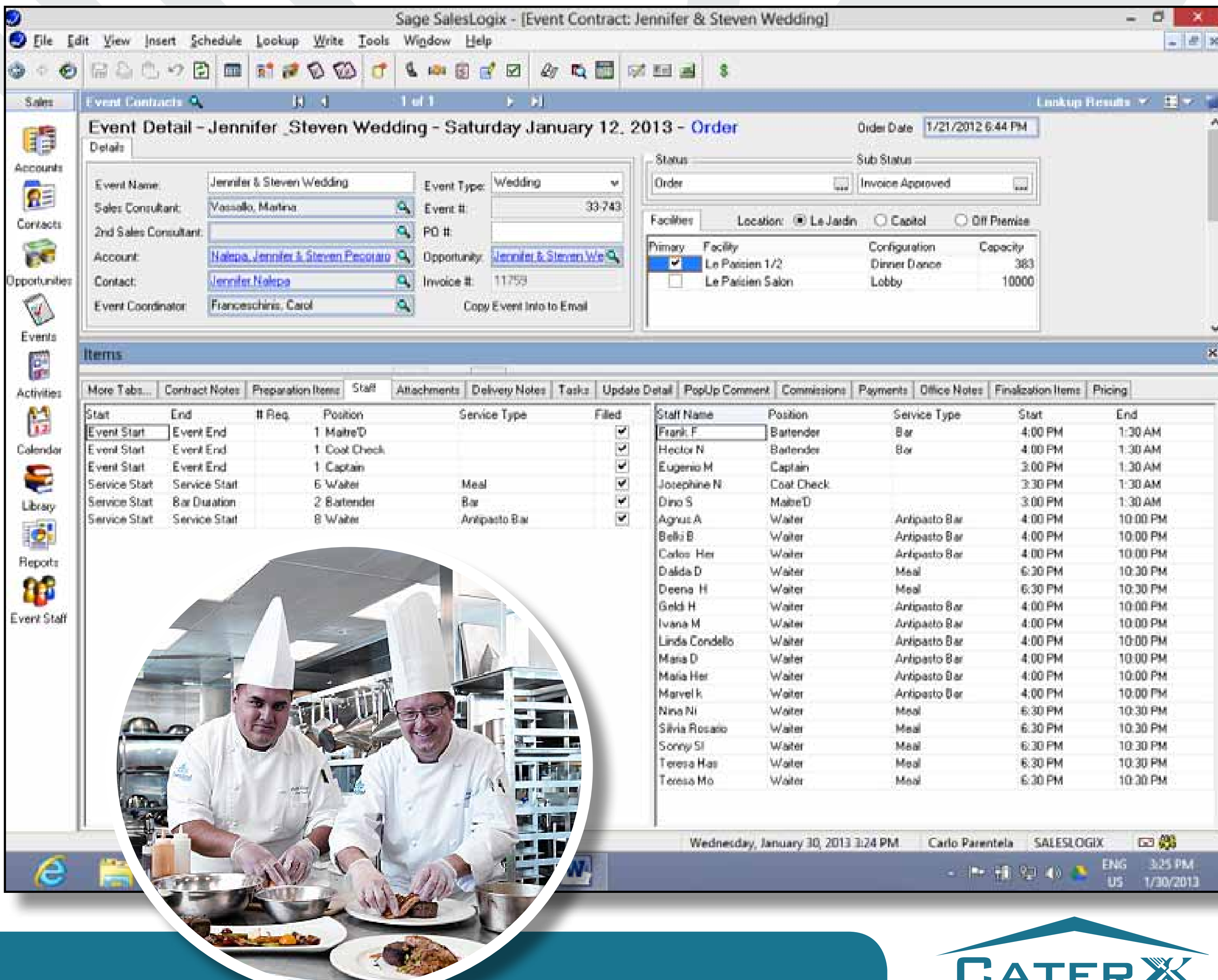
Schedule staff positions according to a pre-determined set of rules that you set up. Rule parameters such as per Event or for the Day, service times (i.e. Breakfast, Lunch, Mid-afternoon break, Wedding Ceremony, Hors D'oeuvres, Bar, Meal time, After Dinner Buffets, etc.)

Manage Job Priorities

Cater-X will allow you to assign job roles and rank them based on their strengths or skill sets. i.e. Staff members can fulfill many roles such as bartender, waiter, captain, etc. The purpose of this is so that CaterX can automatically schedule your more skilled staff first. CaterX is so intuitive that it is able to spread your top performing staff throughout each event so that not all the key staff are working the same function. It also can make sure that certain staff who want to be together can be automatically scheduled. As the staff manager you always have the right to manually change any staff, time or positions.

Manage Daily Staff

Cater-X is the only software to fully automate, forecast, plan and schedule ALL staff required for events or for the facility (i.e. Valet Parking, Bar Backs, etc.) This can be done for a specified time and for multiple events taking place at the same time. Cater-X can look ahead a week, month, year and schedule all staff and functions based on details inputted into the event. Staff allocation is determined on number of guests, menu and function requirements, etc. This allows management full control to edit the schedule at any time and manage staff (based on priorities assigned) and expenditures. No more over or understaffing. CaterX will ensure all job functions are scheduled based on the facility and event requirements. Management can review or quickly print a report to see where staff positions are still unfulfilled.



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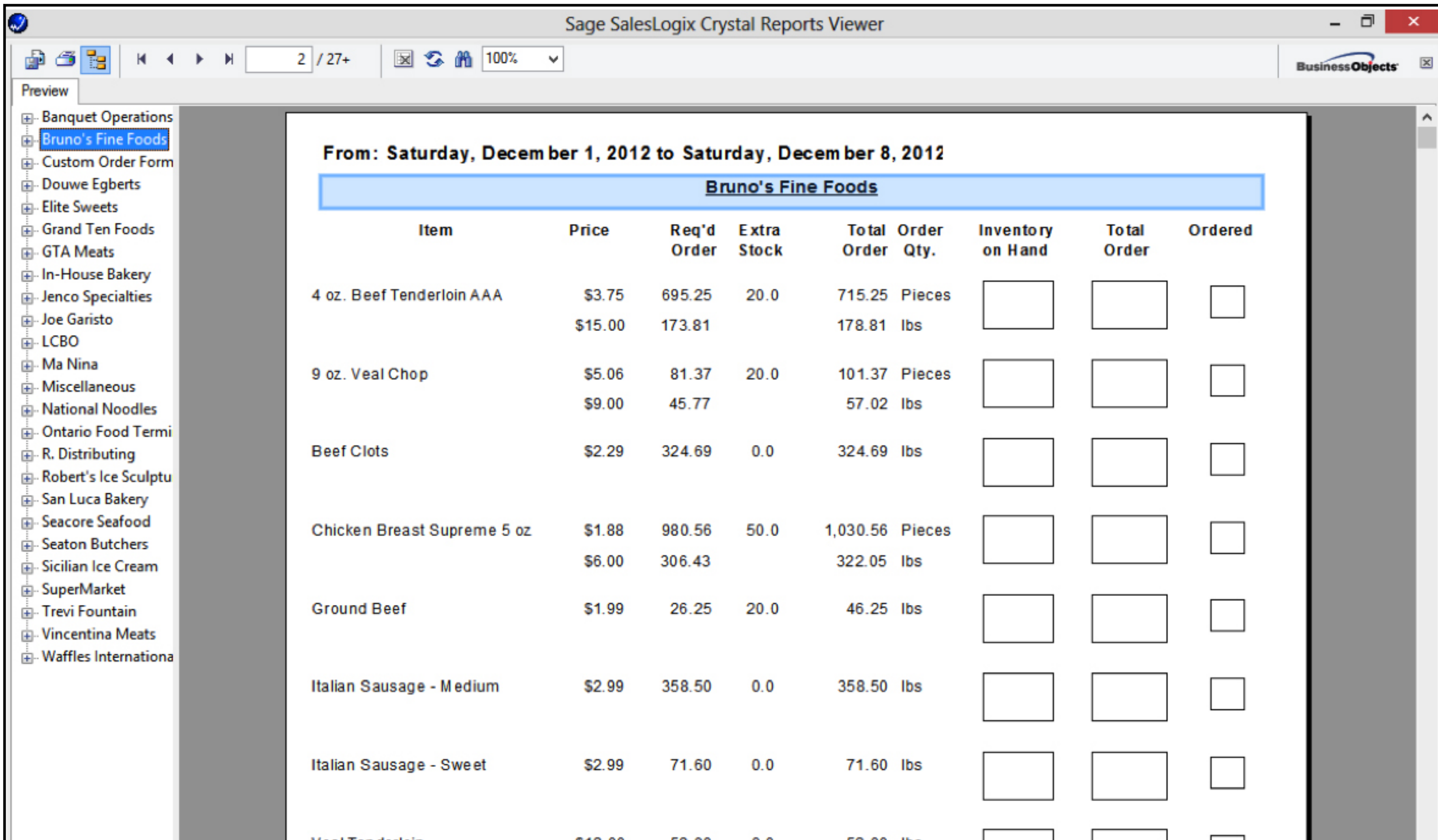
MANAGE MENUS

CaterX will take your kitchen to a whole new level. Choose from a pre-set menu template or customize each event with unique dishes and recipes specially prepared for each party. CaterX has the flexibility to not only provide unique dishes, but also determine the exact quantity of ingredients needed to prepare the food for that function. The Chef now has the ability to quickly generate a Purchase Order report by Supplier that lists the total ingredients required for any time period selected. Cost and food quantity is now managed to precise measurements as determined by you. CaterX becomes your inventory expert and takes away any guessing or questions with respect to menu requirements!!



From: Saturday, December 1, 2012 to Saturday, December 8, 2012

Bruno's Fine Foods

Item	Price	Req'd Order	Extra Stock	Total Order	Order Qty.	Inventory on Hand	Total Order	Ordered
4 oz. Beef Tenderloin AAA	$3.75	695.25	20.0	715.25	Pieces			
	$15.00	173.81		178.81	lbs			
9 oz. Veal Chop	$5.06	81.37	20.0	101.37	Pieces			
	$9.00	45.77		57.02	lbs			
Beef Clots	$2.29	324.69	0.0	324.69	lbs			
Chicken Breast Supreme 5 oz	$1.88	980.56	50.0	1,030.56	Pieces			
	$6.00	306.43		322.05	lbs			
Ground Beef	$1.99	26.25	20.0	46.25	lbs			
Italian Sausage - Medium	$2.99	358.50	0.0	358.50	lbs			
Italian Sausage - Sweet	$2.99	71.60	0.0	71.60	lbs			
Veal Tenderloin	$12.00	52.00	0.0	52.00	lbs			

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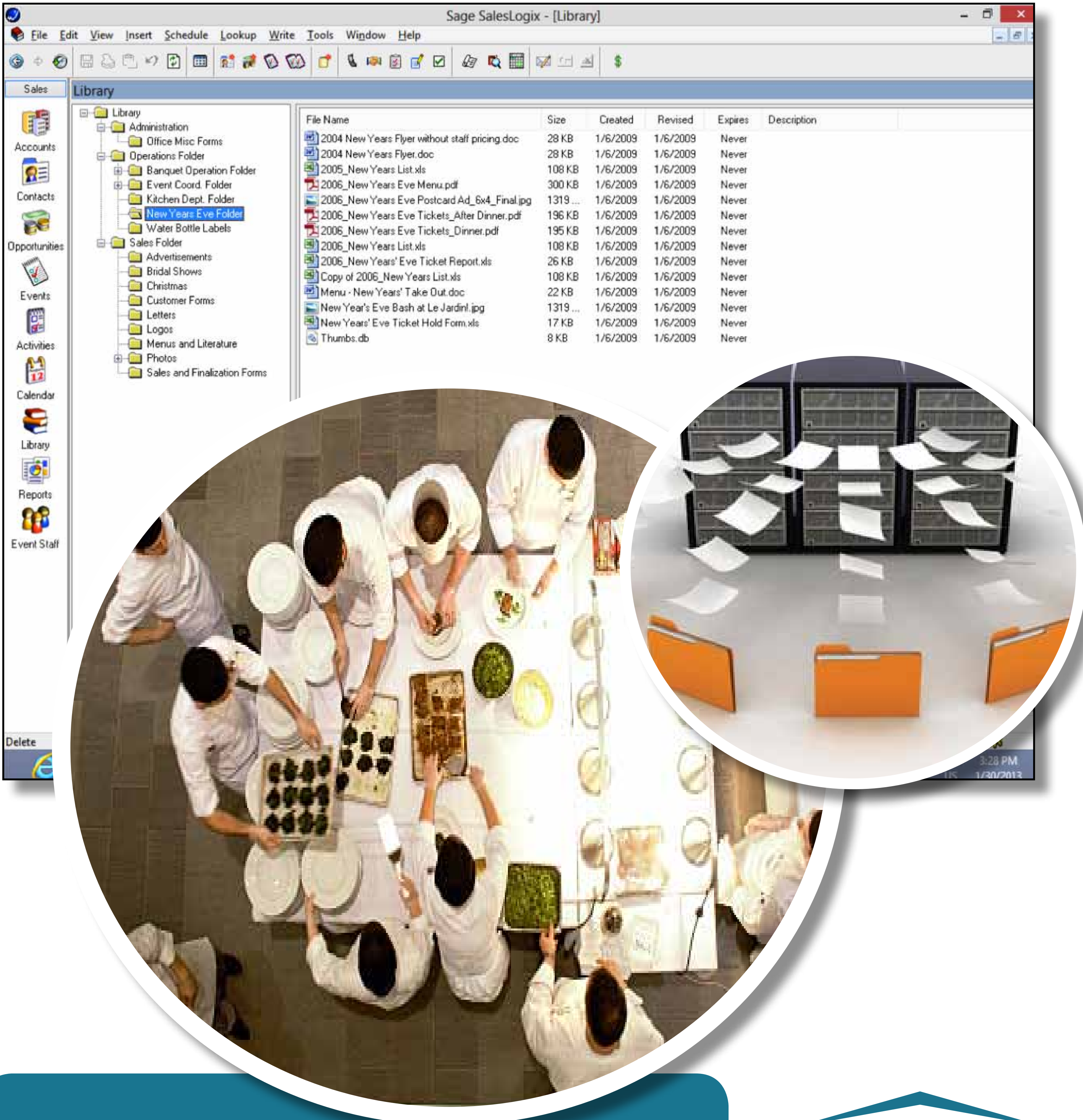
LIBRARY

CaterX features a library tab that allows staff members to scan and upload various documents into labeled folders. i.e. copies of menus, photos, maps, staff lists, layouts, hard copies of contracts, invoices, credit card authorizations, check lists, etc. Each department has the ability to quckly email or print files and ensure key documents are available and shared with authorized staff members. It’s like having your own virtual filing cabinet!



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REPORTS

Simply click and let Cater-X manage every aspect of your catering and hospitality business. CaterX uses the advanced "Crystal Reports" from SAP. Customized reports specifically designed to inform you of key metrics crucial to ensuring your business runs smoothly and profitably. Each department is able to get precise reports outlining exact requirements and criteria anytime!! Human error and manual calculations are no longer an issue. Examples include....

ACCOUNTING

- A/R Report
- Customer Statement
- Deposit Report (a report that accompanies all deposits/payments for control purposes)
- Extra Gratuity Payout (pay out any extra gratuities to the staff from that event according to your %)
- Inadequate Deposit Report (Makes sure that all contracts have the minimum deposit required)
- Invoice
- Pre-Paid Report (a report stating which events must pay in advance)

SALES

- Contract
- Contract - Email (same as contract but with company letterhead and contract conditions)
- Quote
- Customer Work Order (a work order detailing all items and special conditions ready for signature)
- Monthly Sales Summary
- Opportunity Sales Summary
- Past Future Sales Comparison (interesting report that tells you exactly what the sales were looking forward at any time in history compared to today.
- Sales Report

WORK ORDERS

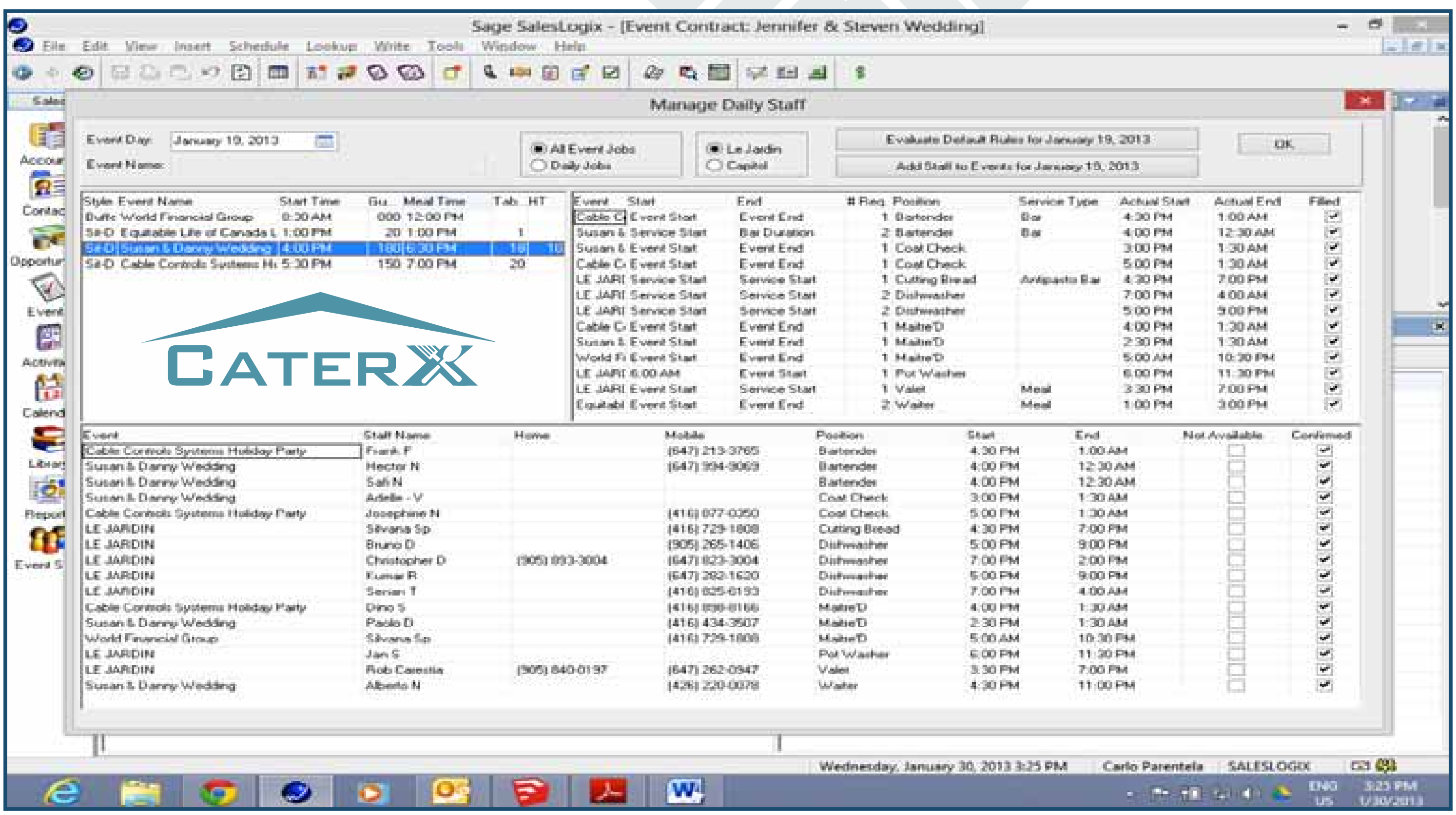
- Bakery Work Order (all info for the bakery department if there is one)
- Bar Work Order (all items and notes that the bartender needs to know)
- Delivery Work Order
- Equipment Not Returned Report (forgot about any equipment still out there at a catering, have this report remind you.
- Fruit Work Order
- Kitchen Work Order
- Manager/Maitre'D Work Order
- Office Work Order (everything is on this report)
- Setup Work Order
- Parking Report (if you have a parking attendant or valet)
- Purchase Order Report (all ingredients required, listed by vendor)
- Sundry Work Order
- Recipe List
- Staff Schedule
- Individual Staff Schedule
- Waiter Menu

MISCELLANEOUS

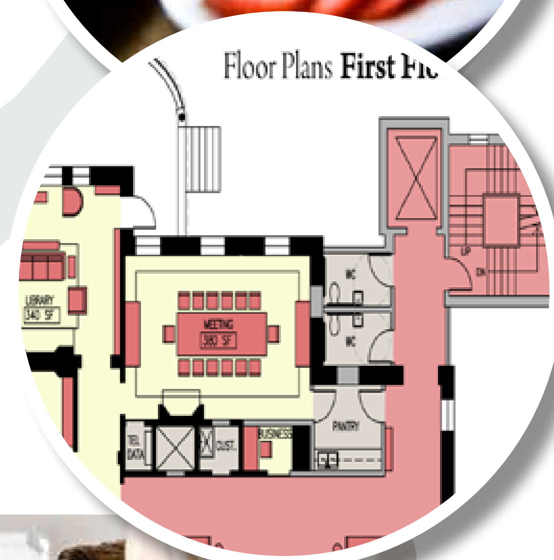
- Event Signage (all door signage)
- Finalization Meeting Report (a report summary of all the events for meeting purposes)
- Competitors List (a list of all your competitors)
- Function Summary (list of all events)
- Incomplete Finalization Items (A report that lists all items still not finalized by the Event Coordinator)
- Ingredient List
- Ingredient Use List (a list stating which recipes ingredients are being used)
- Menu Items List
- Menu Items Required (a list stating all the menu items required for that period)
- Menu Templates

STAFF REPORTS

- Individual Staff Schedule
- House Staff Schedule (schedule of all staff that don't pertain to a specific event, back of house staff)
- Unfulfilled Staff Positions (a quick check on any unfulfilled positions for events)



SALES



Contact and Account Management

- Access and record detailed information about customer accounts and contacts
- Track all customer interactions and add files, notes and literature requests
- Assign ownership, establish account hierarchies and track lead sources and status
- Share information captured at all points of interaction for a complete customer view
- Create dynamic groups with the ability to sort, share and update in real-time

Opportunity Management

- Manage all key opportunity data for maximum sales productivity and effectiveness
- Track probability of close, products, lead source, status and competitors
- Generate sales proposals automatically reflecting native customer currency
- View Opportunity Snapshot and e-mail key summary data to managers with one click

Sales Process Automation

- Drive opportunities to a close and improve forecasting using standardized sales processes
- Define stages in the sales process and assign objectives, activities, results and close probability
- Assign unique processes based on product line, deal size, territory or lead type
- Automate scheduling of follow-up activities such as mailings and phone calls
- Add decision points and conditional requirements before events are triggered
- Quotes & Orders
- Automate customer-facing price quotes and generate sales orders quickly and efficiently
- Track quote and order history for each account, so you can up-sell and cross-sell based on customer preferences
- Integrate with back-office finance, accounting, and inventory systems so that you can be assured the customer qualifies for the purchase and inventory is available

Calendar & Activity Management

- Manage schedules and keep track of activities and events for multiple users
- Track phone calls, meetings, to-dos, events, and literature requests
- Schedule international activities and display dates and times in users' local regions
- Record completed activities automatically within customer records
- Prioritize your day with a welcome page that displays your top calendar and activity items for the day

Sales Productivity Tools

- Track competition – including their strengths and weaknesses – right from the opportunity
- Store proposals, RFI/RFP templates, sales presentations, and other important documents in the library
- Respond to customer literature requests quickly with the ability to attach them from the library and send directly from Sage SalesLogix
- Find customer and account information quickly with Sage SalesLogix SpeedSearch
- Link to customer websites and map to their location directly from within the opportunity

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Alerts & Notifications

• Stay on track with high profile opportunities so you move the deal forward and bring it to a successful close
• Receive alerts via e-mail, phone, or web browser so you never miss an important deadline or milestone
• Monitor data proactively and automatically receive alerts when conditions are met
• Ensure accounts stay active and opportunities are moved forward with automatic notifications around deadlines or inactivity

Sales Forecasting

• Generate accurate sales forecasts at the account, territory or regional level
• Display your forecast graphically on a dashboard, so you have your data displayed in real-time
• Produce forecast reports - inclusive of a graphical display – quickly and easily with out-of-the-box functionality
• Drill deeper into account and forecast information using Sage SalesLogix Advanced Analytics*
• Analytics & Reporting
• View opportunity totals and key metrics for quick analysis of sales pipeline
• Segment opportunities by account manager, region, or probability of close
• Gather critical information via standard or custom reporting
• Analyze sales campaigns, pipeline efficiency, revenue by lead source, and more
• Evaluate sales team performance and guide strategic improvements
• MS Office & Outlook Integration
• Manage contacts, e-mails, and calendars the Sage SalesLogix integration with Microsoft Outlook
• Share contact information between Outlook and Sage SalesLogix address books
• Send e-mails and attachments using Outlook recording to Sage SalesLogix activity history automatically
• Check availability and send meeting requests using Outlook within Sage SalesLogix
• Export Sage SalesLogix reports to Excel for further analysis
• Eliminate double data entry using the integrated Sage SalesLogix and Microsoft applications

Back Office Integration

• Interact with back-office applications, including ERP, accounting, HR, and industry-specific solutions
• Drag and drop documents from your desktop into Sage SalesLogix
• View and share data in real-time such as invoices, pricing information, order information, credit status, payments and returns
• Information entered in another system can be viewed instantly from within Sage SalesLogix
• Easily integrate with MAS 90, MAS 200, MAS 500, X3 or S1000
• Mobility
• Access your Sage SalesLogix CRM data on a wide range of popular devices such as the iPhone®, iPad®, Android™ and BlackBerry® **
• Work offline, or work online over a network or the Web; alternatively you can rapidly synchronize and work offline
• Manage contacts, account history, order tracking, support, and leads – all from your mobile device
• View and edit your key information from your mobile device; including notes, activities, and calendar items

MARKETING

Segmentation & Groups

- Segment customer and prospect lists using advanced query tools
- Perform temporary lookups or create groups for repeat access to sets of records
- Deliver targeted marketing messages and sales offers to select customer segments
- Export group data to Microsoft Excel for additional analysis

Campaign Management

- Design, execute, and track all campaign activities in one location
- Deliver targeted messages and promotions to select customer segments
- Create custom HTML email templates, then personalize and send
- Track actual expenses vs. budget and perform cost analysis

Campaign Response Tracking

- Track response data in real time to analyze the impact of a campaign in progress
- Assess campaign metrics such as response ratio and associated sales revenue
- View or add campaign info and responses from within account and contact records
- Information captured at the individual opportunity level rolls into management view

Lead Management

- Import leads from web forms, tradeshows, seminars, or purchased lists
- Track leads at every stage from prospect through closed sale
- Perform de-duplication on imported leads to ensure the data is clean
- Merge duplicate leads with existing contacts and accounts
- Assign hot leads to sales teams or individuals quickly based on your business criteria

CATERX

Reporting & Analysis

- Track and analyze win/loss information so you can adjust messaging, positioning, and tactics
- Examine campaign data responses, associated revenue, and product detail
- Track budgets vs. expenses per task in the campaign management view
- Create custom or use pre-built dashboards to see win/loss information, opportunity trends, and campaign metrics

Marketing Resource Library

- Provide a fast response to customer requests with a full library of information you build into your CRM
- Store and organize collateral, price sheets, manuals and whitepapers
- Attach literature to email campaigns and customer communication right from Sage SalesLogix
- Create folders to organize items into categories and manage files

Application Integration

- Import relevant customer profile information from web-based applications and social media services
- Export reports and lists into Microsoft Office applications, ie. Excel, Word, etc.
- Integrate with e-marketing, e-commerce, document sharing, social networking, and other web-based services
- Include maps, news, stock information, campaign information, survey responses, social media profiles and customer feedback, in-context, within account and contact records

Sage SalesLogix e-Marketing

- Create and send professional email campaigns to your prospects and customers
- Nurture prospects automatically using drip e-marketing campaigns
- Qualify your leads and route to sales fast using marketing CRM software
- View a ranked list of the hottest prospects based on their interactions with your campaigns
- Send surveys to prospects and customers to mine valuable data for marketing and product

CUSTOMER SERVICE

Ticket Management

- Track ticket ID, contact information, type, status, urgency, assignment, and date needed
- Schedule phone calls, meetings, and actions to follow up on open issues
- Automatically assign tickets to the appropriate resource based on product, location, or skill

Returns & Defects

- Ensure product returns are processed efficiently and accurately
- Record defects, shipping instructions, serial numbers, attachments, and comments
- Track defect details including ID number, severity, priority, status, problem type, description, and source
- Provide a communication medium between support and product departments

Service Contract Management

- Track contract details such as service level, price, time and/or dollars remaining
- Manage multiple contract types – per incident, time period, or dollar amount
- Track time spent on individual tickets and support issues

SpeedSearch/Knowledgebase

- Perform an advanced keyword search of any Sage SalesLogix table or shared network directory
- Reference prior tickets, attachments, standard problems and resolutions, activities, and notes/history
- Populate resolutions automatically into service tickets with one click
- Archive approved resolutions in the knowledge base for future reference
- Alerts & Workflow Automation
- Monitor data proactively and receive alerts when service conditions are triggered
- Automate user/date-time stamps, ticket punch-in/out, ticket number, and assignment
- Configure email workflows, escalation conditions, and notification routing
- Reporting & Analytics
- Capture data and analyze key customer service/support metrics
- View issue totals by category, escalation history, unresolved issues, and a weekly recap
- Using advanced analytics, drill down into details about call type, time to resolve, product issues, and individual performance

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ANALYTICS AND REPORTING

Standard Reports – Sales

- Generate account and contact lists that include any critical CRM information
- Report on funnel opportunities, quota fulfillment, and closed/won/lost
- Detailed forecast reports by account manager
- Export reports into Excel or Word for further analysis
- Standard Reports – Marketing & Support
- Track support issues based on number of open and closed tickets, time to resolution, and follow-up
- Monitor contract status, including activity and expirations
- Track results on active marketing campaigns
- Report on lead source and status

Groups & Filters

- Filter your data based on various criteria, including account, geography, and industry
- Create and define groups based on filtered data
- Export groups to Excel for further analysis and reporting

Configurable Dashboards

- Configurable dashboards provide key analytical information in a visual format
- Dashboards can be configured for sales, marketing, service, and support data
- Choose bar charts, funnels, pie charts, or columns to display your data
- Create timeline visualizations of important account activities

Sage SalesLogix Advanced Analytics

- Analytical dashboards encompass the full range of CRM functionality – sales, marketing, and support
- Multiple graphically-rich charts and visualization tools including bar, pie, line and combination charts, tree maps, heat maps, scatter plots, and bubble charts
- Select data elements, mark records, and drill into multiple levels of details

Advanced Analytics – Sales Dashboards

- Assess sales performance metrics with pre-built dashboards covering:
  - Sales by geography
  - Historical sales
  - Sales trends
  - Sales forecast
  - Sales pipeline
  - Win/loss, ranking
- Productivity analysis
- Analyze sales data based on opportunity, region, sales stage, and more...
- Filter information based on date, opportunity manager, industry, and region
- Export tables to Excel for additional analysis

Advanced Analytics – Marketing Dashboards

- Measure the effectiveness of marketing campaigns through campaign dashboards:
  - Campaign revenue
  - Potential revenue
  - Responses
  - Budget vs. actual comparisons
- Measure and display data based on revenue and opportunities – open, won, or lost
- Filter by campaign, date, lead source, industry, region, and more

Advanced Analytics – Support Dashboards

- Improve customer service and support by acting on insights provided by dashboards covering:
  - Customer support agent performance
  - Ticket categorization
  - Agent workload
- Analyze data based on multiple criteria, including assigned agent, issue, priority, account, and region
- Filter data by support representative, issue, category, and location

For further information please contact:

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