# Training Guide

## Queries and Detail Grids

# Queries and Detail Grids

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# Unit 1: Checking Current Events/Accounts Receivable

**Objectives:**

**Upon completing this unit, you will be able to:**

- *Query the program for all of your current (upcoming) events.*
- *Query events in a certain date range, i.e., one week out, two weeks out, etc.*
- *Generate reports based on the results of your queries.*
- *Print a contract or other event print for one, several, or all of the events in your query results.*
- *Save custom lists of multiple prints for instant access.*
- *Generate a unique e-mail letter, with attachment, to one, several, or all of the events in your query results.*
- *Query all accounts receivables, including accounts that are specifically 30, 60, 90, or 120 days past due.*

## Tracking Your Current Events

*Concept:*

Caterease offers many query tools to help you instantly find any data you need. The Current Events Query, located on the Tools sidebar group on the left-hand side of the Caterease screen, is designed to show details about your upcoming events.

Using this tool, you can see a complete list of all events scheduled for the next week, two weeks, month, etc., all with a single mouse click. What's more, you can generate a multitude of prints based on your results: numerous financial and detail reports in a variety of different layouts; contracts, invoices, and other event prints; miscellaneous prints, including staffing sheets, ingredients lists, costing summaries, and more. You can print one, several, or all of your events, with a single mouse click. You can even generate batch e-mails, attaching any number of prints and using a dynamic merge letter as the body of your outgoing message!

**Image 1.1: Current Events Query**
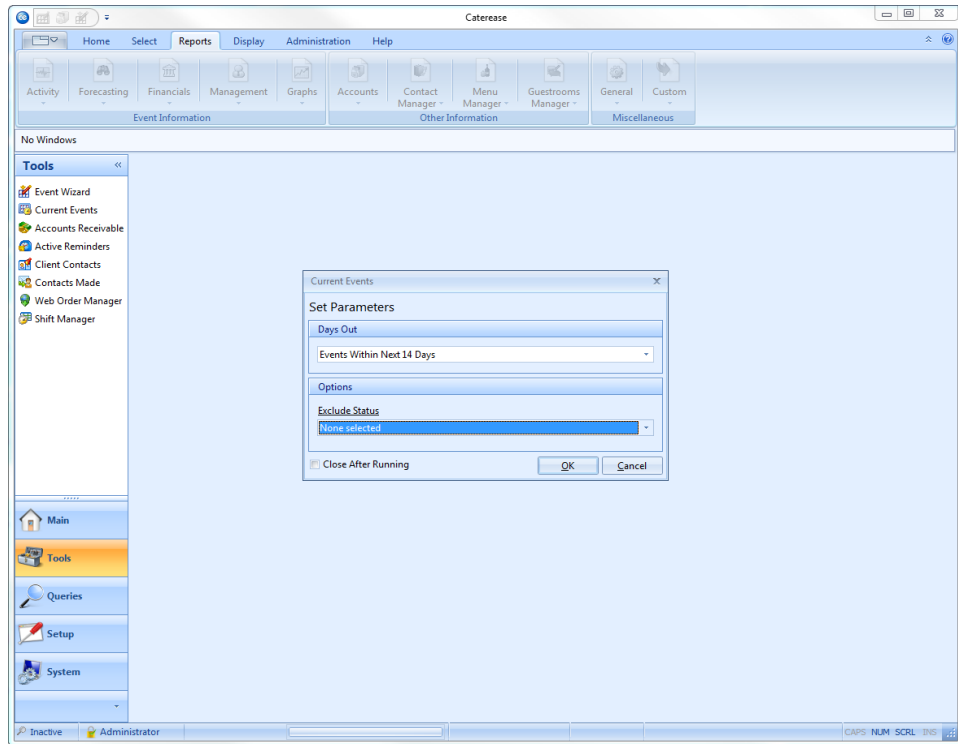


1. Click the **Tools** sidebar on the left-hand side of the Caterease main screen.
2. Click the **Current Events** button.
3. Click the down arrow under <u>Days Out</u>, and set a date range for your query.
4. Click under <u>Options</u> > <u>Exclude Status</u> to suppress events with a status of Definite, Cancelled, Closed, Tentative, or Prospective.
5. Click **OK** to generate the query.
   *Result: The results of your query will be displayed in a detail grid (see Image 1.2, on the next page).*
   *Note: At the bottom left-hand corner of the Current Events Query tool, a checkbox tells the program to optionally close the window once the query is completed.*

**Image 1.2: Current Events Results Grid**



## Generating Reports from a Results Grid

*Concept:*

Several pre-formatted reports are available in a variety of layouts, to show financial information and general details about all of the events listed in your query results grid.

1. Click the **Print** button [icon], located at the top left-hand side of the results window.
   **Result:** *The Select Desired Print window opens.*
2. Click the **Reports** tab.
3. Select the title of the report you want to print. (*See Table 1.1 for a description of the various reports.*)
4. Click the **Print** button, located at the bottom of the Select Desired Print window.
5. [**Optional**] Click your right mouse button over any report title and choose **Rename Report** to change that title. Click the right mouse button again and choose **Save Report Titles**, if you want that change to be permanent.

**Table 1.1: Query Results Reports**

| Default Report Title | Contents |
|---|---|
| **General Financials** | Client/Organization, Event Number; Event Date; Food Total; Beverage Total, Liquor Total, Equipment Total, Labor Total, Room Total, Other Total; Subtotal; Gratuity; Service Charge; Tax; Total |
| **Extended Financials** | Same as above, plus: Sales Rep; Guests; Amount Paid; Balance; Additional Food/Service Item Types; Variance (Days Out) |
| **Payments Made** | Client/Organization; Event Number; Event Date; Telephone; Sales Rep; Category; Guests; Subtotal; Service Charge; Tax; Total; Amount Paid; Balance; Next Deposit; Next Deposit Due Date; Variance (Days Out)<br>*The following payment details (money received) are also included:*<br>Payment Date; Payment Amount; Pay Method<br>*The following deposit details (money scheduled to be received) are included:*<br>Due Date; Deposit Amount; Paid (Yes/No); Payment Date |
| **Tax Breakdown** | Identical to General Financials Report, above, with the following additional fields: Taxes 1, Taxes 2, Taxes 3 and any additional Food/Service Item Types that have been added. |
| **Revenue Summary** | *Event fields included:*<br>Client/Organization; Event Number; Event Date; Sales Rep; Guests; Food Total; Beverage Total; Liquor Total; Equipment Total; Labor Total; Room Total; Other Total; Subtotal; Gratuity; Service Charge; Tax; Total; Paid Amount; Balance; Cost per Guest<br>*Sub-event fields included:*<br>Description; Start Time; End Time; Venue; Guests; Members; Non-Members |
| **General Details** | Client/Organization; Event Number; Event Date; Telephone; Booking Contact; Site Contact; Sales Rep; Theme; Guests |
| **Event-Specific Dates** | Client/Organization; Event Number; Event Date; Sales Rep; Booked Date; Revised Date; Definite Date; Cancelled Date; Contract Date; BEO Date; Next Deposit Date |
| **Include Sub-Events** | Same as General Details, above, plus: Sub-Event Description; Sub-Event Guests; Start Time; End Time; Venue |
| **Extended Details** | Client/Organization; Event Number; Event Date; Telephone; Fax Number; Booking Contact; Site Contact; Sales Rep; Theme; Reference; Category; Folio #; Guests |

## Generating Event Prints

**See Image 1.3**

*Concept:*

You can highlight one, several, or all events listed in your results grid and generate contracts, invoices, and other event prints for those parties. You can even generate multiple prints for multiple events, with a single mouse click!

### *Generating a Print for Multiple Events*

*Note: Not Available in the Express Version.*

1. From the query results, select multiple events by holding down your **[Shift]** or **[Ctrl]** key while selecting.
2. Click the **Print** button.
   *Result: The Select Desired Print window opens.*
3. Select the **Prints**, **Sub-Prints, Documents***,* or **Labels** tab.
   *Note: Batch printing is not available for reports.*
4. Select a print title.
5. Click the **Print** button at the bottom right-hand side of the form.
   *Result: One print for each of the selected events will be automatically sent to your printer.*
   *Note: Batch prints do not generate a Print Preview; they are sent to your printer automatically.*

**Image 1.1: Generating Multiple Prints**

### *Generating Multiple Prints for Multiple Events*

1.  Select an event from your results screen, or hold your **[Shift]** or **[Ctrl]** key down to select multiple records.
    *Note: The [Ctrl] key lets you select individual records; the [Shift] key selects two records and all others in between them.*
2.  Click the **Print** button.
    *Result: The Select Desired Print window opens.*
3.  Click the **Multiple** button.
    *Result: A new panel opens along the right-hand side of the Select Desired Print window.*
4.  Select the **Prints**, **Subprints, Documents,** or **Labels** tab.
    *Note: Multiple printing is not available (and not necessary) for reports.*
5.  Select a print title.
6.  Click the right-arrow button ▶, located in the middle of the **Select Desired Print** window.
    *Result: Your selected print title is moved to the panel on the right.*
7.  Repeat for other desired prints.
8.  Type, into the field on the right-hand side of the pane, the number of prints you would like to generate for each print.
9.  Click the **Print** button at the bottom right-hand side of the form.
    *Result: Multiple prints for each of the selected events will automatically be sent to your printer.*
    *Note: Multiple prints do not generate a Print Preview; they are sent to your printer automatically.*

### *Creating Custom Multiple Print Lists*

Once you have established a list of multiple prints to generate, you can save that list for future use. For example, you can create a custom list of multiple prints called "Back of House Prints," which might consist of kitchen prints, ingredients lists, required items lists, etc., and then retrieve that list, with a single mouse click.

*Tip: If you want all users on your Caterease network to have access to your custom print list click the **Shared** button at the bottom of the window. Local print lists are only accessible on the computer from which they are created.*

1.  Follow the steps in the section above to select multiple prints to be generated.
2.  Click the **Multiple Prints** button at the top right of the Select Desired Print window.
3.  Choose **Custom**.
4.  **[Optional]** Click the **Shared** button at the bottom of the Custom Multiple Prints window if you want this custom prints list to be shared with other users on your Caterease network.
5.  Click the **Add Multiple Prints** button.
6.  Type a name for your new print list.
7.  Click the **Save Current Multiple Prints List** button.
8.  Close the Custom Multiple Prints window.

## Generating Batch E-mail

**See Image 1.4**     *Concept:*

As an ultimate time-saver, Caterease lets you generate an entire batch of e-mails — multiple e-mails to multiple recipients — with a single mouse click! You can even attach files or Caterease event prints to these e-mails. For example, you can send an e-mail to all clients that owe you money, and attach a unique invoice to each one, as a .PDF (or other common format). But what really makes the Caterease e-mail tool stand out is the ability to use one of your custom Marketing Tools merge letters as the body of your outgoing e-mail! So each recipient receives their custom event print, attached to an e-mail letter that looks as if it were typed especially for him, and your fingers never even have to touch the keyboard!

**Image 1.3: Sending a Batch E-mail**

1.  From the Current Events query, select multiple events by holding down your **[Shift]** or **[Ctrl]** key while selecting.
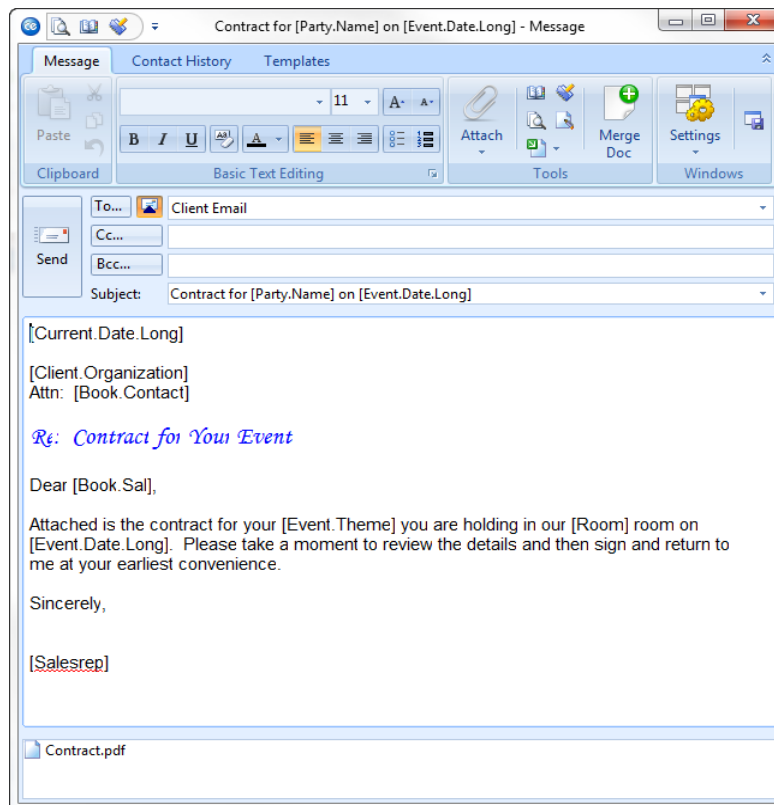
*Note: Batch e-mail printing is only available in the Professional version.*

2.  Click the **Email** button, located at the top left of the query results screen.
    ***Result:*** *An Untitled Message window opens.*
    ***Note:*** *The e-mail address for this outgoing e-mail will default to the Client E-mail associated with each selected record.*

3.  Type a subject for your e-mail into the <u>Subject</u> field. Alternatively, click the down arrow to the right of the field to access a custom, user-created, quick-pick list.

4.  Type a message as the body of your e-mail in the large white text block.
    *Note: If you own the Marketing Tools package, you can use one of your custom merge letters as the body of your e-mail. These letters will automatically merge in information from the current prospect, including name, salutation, current date, etc.*
5.  **[Optional]** Format the text of your e-mail using the Format toolbar on your e-mail window.
6.  **[Optional]** Click the **Attach** button, located at the top of the e-mail window, and choose **File** to attach a different file from your computer, to this e-mail, or choose **Print** to attach one or several Caterease event prints.
    *Note: Attached files and prints appear in the small pane at the bottom of the E-mail window.*
7.  When finished, click **Send**.
    *Result: The e-mails are sent through your E-mail program (often Outlook), and any files you have attached are exported. Although the e-mails are sent as a batch, all merge fields will populate with the specific details for each recipient.*

## Running an Accounts Receivable Query

**See Image 1.5**    *Concept:*

While the Current Events query will quickly track all of your upcoming events, the Accounts Receivable query will track all events with a date that has passed and a balance still outstanding. You can choose to look at only those events that are 30 days out, 60 days out, etc.

**Image 1.4: Tracking Accounts Receivable**
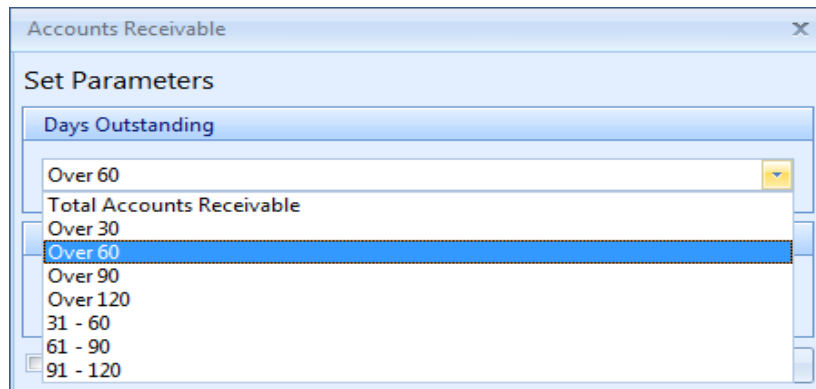


1.  Click the button labeled **Accounts Receivable** in the **Tools** sidebar group.
    *Result: The Accounts Receivable tool opens, allowing you to select a date range.*
2.  Click the down arrow under Days Outstanding and set a date range for your query.
3.  Optionally click the checkbox to the left of the Exclude Events With Very Small Balances field if you would like to exclude events with a balance of less than five cents.
4.  Click **OK** to generate the query.
    *Result: A results grid displays, listing all events in your database that owe you money within the date parameters you have set.*

*Note: At the bottom left-hand corner of the Accounts Receivable tool, a checkbox tells the program to optionally close the window once the query is completed.*

## Remember This:

In this unit, you have learned a few very important concepts about tracking upcoming events and accounts receivable. Here are some things you might want to jot down in the **Table of Things I Want to Remember**, located on the last page of this book:

- *You can track all of your upcoming events, or those coming up in the next week, two weeks, three weeks, etc., using the Current Events Query (Page 1.1).*

- *You can generate a host of financial and detail reports based on the results of your queries (Page 1.3).*

- *You can print a contract or other event print for one, several, or all events in your query results grids (Page 1.5).*

- *You can print multiple prints for a batch of events, with a single mouse click (Page 1.6).*

- *You can generate a batch of e-mails for one, several or all events in your results grids, including attachments (Page 1.7).*

- *You can track all of your accounts receivable (events that have passed and still have outstanding balances), or those that are 30 days past due, 60 days past due, etc. (Page 1.8).*

# Unit 2: Customizing the Results Grid

**Objectives:**

**Upon completing this unit, you will be able to:**

- *Customize the results grid to show the columns of information you want to see.*
- *Sort the data in the grid by any detail.*
- *Group the data in the grid by any detail.*
- *Save your custom grid displays for future use.*
- *Filter records from the grid that you temporarily don't want to see.*
- *Save your custom filters for future use.*
- *Print the detail grid as a custom report.*
- *Export your grid data for use in another software program.*
- *View grid results in a chart view or layout view for quick reference and presentation.*

## Adding and Removing Columns in the Grid

*Concept:*

Caterease grids offer unprecedented flexibility! These powerful tools let you look at any information you're interested in seeing. You can customize the columns displayed on a grid; sort or group the grid data by any detail; create footers to show sub-totals for each of your groupings; and then print or export the grid that you have created. You can even save your custom grid views for future use, making a limitless number of custom displays just a mouse click away!

1. From a query results grid, click the **Quick Column Customizing** button , located at the top left of the detail grid (to the left of the first column heading).
   ***Result:*** *A drop-down list of column headings displays.*
2. Click the checkbox next to any optional field name.
   ***Result:*** *Fields that are checked off will appear as columns in the grid.*
3. [**Optional**] Hold your left mouse down on that column name in the list and drag up or down to reposition it within the grid.
   ***Result:*** *The column heading is moved to a new position in the grid.*
4. **[Optional]** Click to remove the check next to any column heading in the list to remove that column from the grid.

5. **[Optional]** Click the **Save Window Settings** button  (located at the top of the screen) if you want this to be the new default arrangement for this detail grid,

or choose to save this as a custom grid view (*see the section on Saving Custom Grid Views*).

**Result:** *A confirmation message will appear. Click* **Yes** *and your new arrangement will be saved as the new default look for this grid.*

**Image 2.1: Adding/Removing Columns in a Grid**



## Using the Field Chooser

1. Click the **Field Chooser** button [icon], located at the top right-hand side of the detail grid.
   **Result:** *A small Customization window opens.*
2. Hold your left mouse button down on a column heading in the Customization window.
3. Drag the column heading onto your detail grid, positioning it anywhere among the other column headings.
   **Note:** *You must position it among the headings of the columns on the grid; positioning it in the grid itself will not work. You will see double green arrows as you drag to let you know you are positioning it correctly.*
4. Release your left mouse button.
   **Result:** *The column you selected is added to the grid.*
5. Repeat as desired to add other columns.
6. When finished, click the small **X** at the top right of the Customization window.
   **Result:** *The Customization window closes.*

7. **[Optional]** Click the **Save Window Settings** button [image], located at the top of the screen, if you want this to be the new default arrangement for this detail grid, or choose to save this as a custom grid view (*see Saving Custom Grid Views, discussed later*).
   **Result:** *A confirmation message will appear. Click **Yes** and your new arrangement will be saved as the new default look for this grid.*

## Sorting Grid Data

*Concept:*

You can sort any detail grid in the program by virtually any column of information. For example, perhaps you'd like to see this week's events sorted chronologically by date. Or perhaps you'd rather sort them by the name of the sales representative assigned to the party. Or maybe you'd like to see all of those events sorted *first* by date and *then* by sales representative *within* each date. With Caterease, it's all up to you.

### Sorting by a Single Column

1. From a query results grid, click the heading of a column you wish to sort by.
   **Result:** *The records are sorted in ascending order by that column.*
2. **[Optional]** Click the same column heading again to sort in descending order by that column.

**Note:** *Available in Professional version only.*

### Multi-Column Sorting

1. From a query results grid, click the heading of a particular column to sort by that column.
2. Hold the **[Shift]** key down on your keyboard.
3. Click the heading of another column.
   **Result:** *Records are now sorted by this second column within the first column you selected.*

## Grouping Grid Data

**See Image 2.2**    *Concept:*

Another powerful option in Caterease detail grids is the ability to separate data into groups based on any grid detail. For example, maybe you would like to see the financial information for all of this month's parties grouped by sales representative, complete with financial subtotals for each group. You can even group *within* groups, seeing, for example, events grouped by sales representative and then perhaps grouped by status within each sales rep's group.

**Image 2.2: Grouping Grid Data**



## Creating a Group

1.  Click the **Group By Box** button, located on the upper right-hand side of the screen.
    *Result: A small panel along the top of the results screen displays, allowing you group your events by a particular column.*
2.  Click your right mouse button on the heading of any column in the grid.
    *Result: A pop-up menu opens.*
    *Note: You must click on the heading of a column; clicking within a column presents a different pop-up menu.*
3.  Select **Group By This Field**.
    *Result: A small panel containing your chosen column heading is displayed across the top of the detail grid, and grid data is now separated into groups based on your selection.*
4.  Repeat Step 2 to create sub-groups, or groups within groups (*Professional version only*).
    *Note: For example, you could choose to group all events by <u>Theme</u>, and then by <u>Sales Rep</u> within <u>Theme</u> (sub-groups).*

## Viewing Grouped Data

1.  Click the plus sign to the left of each group in the grid to display the records in that group.
    *Result: The group opens and displays its records, including footers (group subto-*

*tals), where applicable.*
*Note: In some cases, you need to scroll up to the top of the grid to see the plus sign and group headers.*

2. Click the minus sign to the left of any expanded group to collapse that group and hide its contents.
   *Result: The group closes and hides its records.*
   *Note: As an option, you can right-click a grid and select **Expand All** or **Collapse All** to open or close all groups, respectively.*

## Removing Groups

1. Click your right mouse button over any column heading in the group panel (the small panel along the top of the results grid).
   *Note: Each heading must be done individually.*
2. Select **Remove From Grouping**.
   *Result: The records are no longer grouped by that heading.*
3. Repeat for any other group headings (if necessary).

4. Click the **Group By Box** button ▦, located at the top right of the grid, to close the group panel.
   *Result: The small panel at the top of the grid disappears.*

## Using Group-By Sorting

*Note: Not available in the Express version.*

1. At the top of a grid, click the **Settings** button and choose **Grid Settings > Group By Sorting**.
   *Result: While nothing appears to have changed, you have, in fact, enabled the "Group By Sorting" feature in this grid.*
   *Note: If you want Group By Sorting to be enabled in this grid by default, once you've performed this step you can click the **Save Window Settings** button ▦.*
2. Click any column heading.
   *Results: Records are instantly grouped by that column, alphabetically.*
   *Note: Clicking another column heading will change the grouping to reflect that column.*

## Saving Custom Grid Views

**See Image 2.3**        *Concept:*

*Note: Not available in Express version.*

Once you've established the grid you want (the columns are displayed the way you want, sorted the way you want, grouped the way you want, etc.), you can save that custom grid view for future use. Perhaps every month you're going to want to look at your financial information grouped by sales representative. Create this grid view once, then save it to be retrieved every month, with just the click of a button. Grid views can be saved locally (meaning they will only be available on your computer) or shared across all Caterease users on your network.

**Image 2.3: Saving Grid Views**
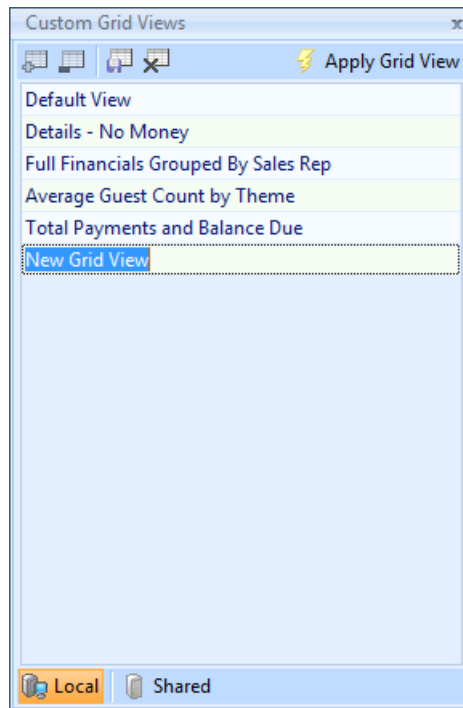
1. Establish a custom grid view, as outlined earlier in this unit.
2. Click the **Views** button at the top left of the results grid display.
3. Choose **Custom**.
   ***Result:*** *The Custom Grid View window opens.*

4. Click the **Add Grid View** button [button icon].
5. Type a name for your new grid view.

6. Click the **Save Current Grid View** button [button icon].
7. Close the Custom Grid Views window.

## Filtering Grid Data

**See Image 2.4**    *Concept:*

Perhaps at any given time you might see more records in a particular detail grid than you really want to look at. You can instantly (and temporarily) filter out certain records from your grid based on any detail. For example, maybe, when looking at the events taking place in the current month, you decide you only want to see those parties for a particular sales representative. Or perhaps you would like to see only those events that have a status of *Definite*. Or perhaps you want to use both of these criteria to filter your records — and see only those events that have a particular sales representative **and** a status of *Definite*. "Snap Filters," described below, offer a quick and easy way to see only what you want to see.

**Image 2.4: Filtering Grid Data**



## *Establishing a Snap Filter*

1. Float your mouse pointer over a column heading in the grid to reveal a funnel icon at the right of the column heading.
2. Click the down arrow at the right of a particular column heading - for example, the column heading labeled <u>Status</u>.
   *Result: A drop-down list appears, listing all options available for that column. In our example of Status, the drop-down list might included the options of Definite, Tentative, Prospective, etc.*
3. Select an option from the list.
   *Result: A filter is instantly created, filtering out all records that do not match that selection. As an option, you can click the checkbox next to several options in the list to filter by multiple details.*
   *Note: The details of your filter are indicated in the lower left-hand corner of the grid. Changes made to a filter are automatically stored in temporary memory as long as this screen remains open, and can be retrieved as detailed below.*
4. Repeat Steps 1 and 2 as desired to further filter data.
   *Result: The filter updates to reflect your changes.*

### *Establishing a Custom Filter*

1. Click the funnel at the right of a particular column heading - for example, the column heading labeled <u>Status</u>.
   *Result: A drop-down list appears.*
2. Select **Custom.**
   *Result: The Custom Filter window opens.*
3. Establish your first filter condition. For example, choose Equals as your comparison, by clicking the down arrow on the left-hand side of the window, and Definite as the status, to the right.
   *Note: The example outlined above would be intended to filter out all events that do not have a status of Definite.*
4. **[Optional]** Select **And** or **Or** and repeat Step 3 on the second line to establish a second condition.
   *Note: A second condition is optional. Perhaps in the example above you want to see all events that have either a status of Definite **or** a status of Tentative. This would necessitate a second condition in the custom filter.*
5. Click **OK** to set your filter.
   *Result: All records that do not match the conditions of your filter are removed from the grid.*
   *Note: The details of your filter are indicated in the lower left-hand corner of the grid. Changes made to a filter are automatically stored in temporary memory as long as this screen remains open, and can be retrieved as detailed below.*

### *Retrieving an Existing Filter*

1. Restore previous filters from this grid session by clicking the down arrow to the right of the filter details (bottom left-hand corner of the grid) and choosing a different filter from the list.
   *Note: This list saves filters you have established in this one session of the grid only. See Saving Custom Filters, below, for information on creating a list of saved filters for frequent use.*

### *Removing a Filter*

1. Click the **X** at the bottom left of your detail grid. Alternatively, you may click the **Clear Filter** button, located within the **Filters** button (drop-down arrow).
   *Note: Filters will not be preserved if you close the results grid window.*
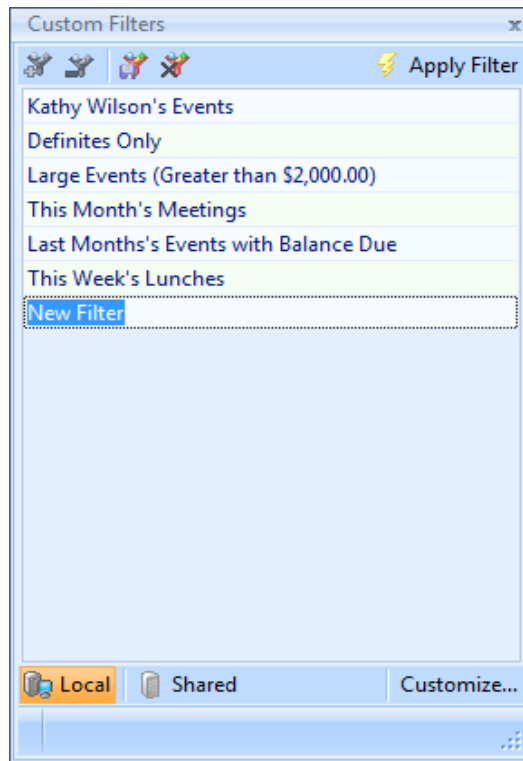
## Saving Custom Filters

**See Image 2.5**    *Concept:*

*Note: Not available in Express version.*

Just like custom grid views, you can save your custom filters for future use. Again, these can be saved locally (for just this machine) or shared across the Caterease network.

**Image 2.5: Saving Grid Filters**



1. Establish filters as outlined above.
2. Click the **Filters** button at the top left-hand side of the results grid display.
   *Result: A drop-down list appears.*
3. Choose **Custom**.
   *Result: The Custom Filters window opens.*
4. **[Optional]** Click the **Shared** button at the bottom of the Custom Filters window if you want this custom filter to be shared with other users on your Caterease network.
   *Note: The **Local** button, selected by default, means this filter will be available only on your computer.*

5. Click the **Add Filter** button [icon].
   *Result: A new filter is added to your list, with the default name New Filter.*
6. Type a name for your new filter into the field.

7. Click the **Save Current Filter** button [icon].
   *Result: Your new filter is saved.*
8. Close the Custom Filters window by clicking the **X**, located at the top right-hand side of the window.

## Printing a Detail Grid

*Concept:*

Once you have created your ideal grid, showing you just the information you want, arranged to suit your preferences, you can send it directly to your printer. You can give the print any title you want, since you are literally creating your own custom report.

1.  Customize your results grid as explained in the preceding sections.
2.  Click the **Print Grid** button , located to the right of the grid display.
3.  **[Optional]** Click the **Format** button at the top of the Print Preview screen to edit the text and formatting of the title of this print.
4.  Click the **Print** button , located at the top of the Print Preview screen, to send the print to your printer.

## Exporting Grid Data

*Concept:*

In addition to printing your custom grid, you can export it for use in other software programs. The grid will export exactly as you have it laid out, and the Professional version of Caterease will even offer to bring you directly to your exported grid data.

1.  Customize your results grid as explained in the preceding sections.
2.  Click your right mouse button anywhere in the grid display.
3.  Select **Export Data**.
4.  Choose an export format — Microsoft Excel, text file, HTML, XML,PDF, etc.
    ***Result:*** *A window displays for you to enter a name for your exported file and a directory for it to be saved in.*
    ***Note****: Certain grids also allow export to Constant Contact or Exact Target, if you own the interface with those services.*
5.  Click the down arrow next to **Save In** at the top of the window to choose a location for your exported file.
6.  Click in the File name field at the bottom of the window and type a name for your exported file.
7.  Click **Save**.
    ***Result:*** *A prompt will display.*
    ***Note:*** *If you have the Professional version of Caterease, this prompt will offer to open your export file for you automatically. If you have the Standard version, you will need to open a third-party application on your own and search for the export file.*

## Viewing Grid Results in a Chart or Graph

**See Image 2.6**    *Concept:*

In addition to displaying results of your Caterease queries in a detail grid, the Professional version of the program lets you view these results in a graphic chart view, showing you information in a bar graph format, or pie chart, or line graph, etc. You can control what detail the records are charted or graphed by, and you can even add additional information (such as cost, profit, etc.), to the charts. These options are perfect for quick reference or for presentation purposes.

### *Viewing a Chart*

***Note:*** *Available in the Professional version only.*

1.  Click the **Chart View** button, located at the top of the query results grid.
    ***Result:*** *The grid display changes to a chart.*
2.  [**Optional**] Click the down arrow to the right of **Chart By** (top of display) to choose a different criterion on which to base your chart.
    ***Result:*** *The chart updates to reflect your changes.*

**Image 2.6: Using Chart View**
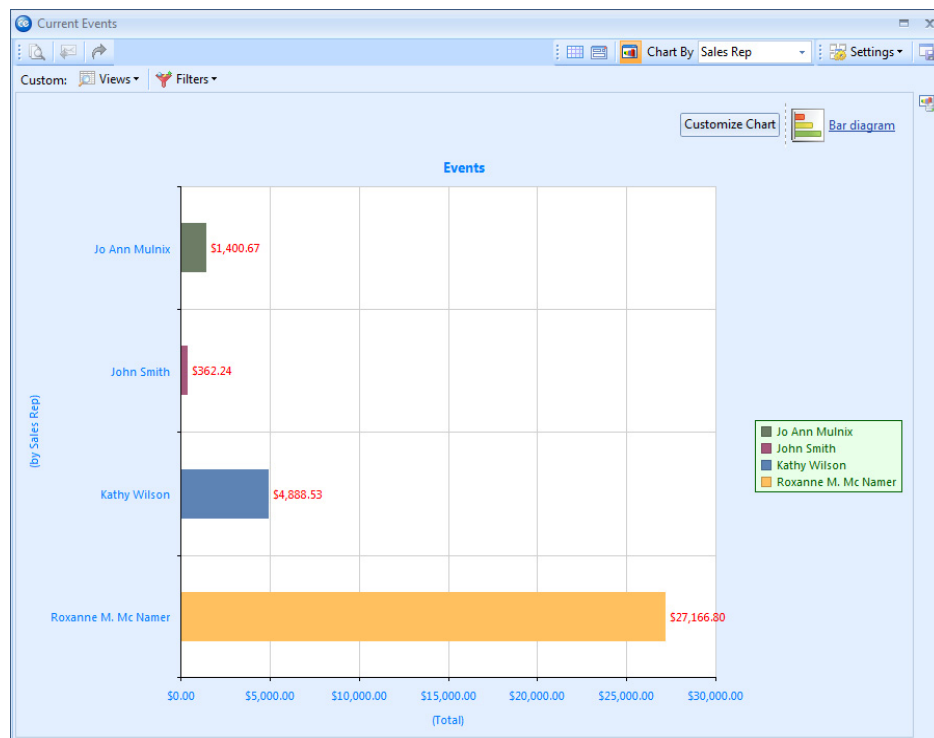


### *Switching Chart Types*

1.  Click **Bar Diagram** at the top right of the chart.
    ***Result:*** *A drop-down list of chart options appears.*

2. Click a different chart type to select it.

## *Customizing the Chart*

1. Click **Customize Chart** at the top right-hand side of the chart.
   *Result: A Customization window appears.*
2. Set optional settings on the **Series** and **Options** tabs by clicking the radio buttons.
3. Click the small **X** at the top right-hand corner of the Customization window to close it.

## *Printing the Chart*

1. Click the **Print Chart** button [image] at the right of the results screen.
   *Result: A Print Preview screen displays.*
2. Click the **Print** button at the top of the Print Preview screen to send the print to your printer.

## *Viewing Grid Results in Layout View*

**See Image 2.7**    *Concept:*

In addition to being able to view grid results in a chart view, you are able to view the grid results in a handy layout view (if you own the Professional version). The fields which display on the layout view are customizable, and the end result can be printed or e-mailed, as described in other sections of this guide.

*__Note__: Refer to the Customizing the Screen Displays user guide for detailed information on how to customize the fields.*

1. Generate a query, such as a Current Events Query or Accounts Receivable Query, as described in Unit 1.

2. Click the **Layout View** button [image], located at the top of the query results grid.
   *__Result__: The grid display changes to a layout view.*

3. Click the **Field Chooser** button [image], located on the right hand of the screen, if you would like to add or remove fields.

Image 2.7: Using Layout View



## Remember This:

In this unit, you have learned a few very important concepts about manipulating data in Caterease detail grids. Here are some things you might want to jot down in the **Table of Things I Want to Remember** on the last page of this book:

- *You can add or remove columns of information to your various Caterease detail grids (Page 2.1).*

- *You can sort grid data based on any column in the grid (Page 2.3).*

- *You can group grid data based on any column in the grid (Page 2.3).*

- *You can save your custom grid views for future use (Page 2.5).*

- *You can temporarily filter records out of a detail grid (Page 2.6).*

- *You can save your custom grid filters for future use (Page 2.8).*

- *You can print your detail grid as a custom report (Page 2.10).*

- *You can export your grid data for use in other software programs (Page 2.10).*

- *You can view the results of your queries in a chart or graph rather than in a grid (Page 2.11).*

- *You can view the results of your queries in a layout view, and can customize the field you would like to see (Page 2.12).*

# Unit 3: Creating a Custom Events Query

**Objectives:**

**Upon completing this unit, you will be able to:**

- *Track all events in your program based on any search conditions.*
- *Add multiple query conditions.*
- *Use relative date ranges to query events.*
- *Set conditions for your query.*
- *Save custom queries for future use.*

## Running an Events Query

*Concept:*

The Events Query is perhaps the most popular and most powerful query tool Caterease has to offer. Using this feature, you can search through your entire database of events and find only those that match certain conditions you set. For example, you could search only those events that take place during a certain date range, or only those events with a certain theme, or only those events with a certain sales representative. You could also search for only those events that take place during a certain date range **and** have a certain theme **and** a certain sales representative. Any information you need is available at your fingertips.

## Adding Query Conditions

**See Image 3.1**

1. Click the **Events Query** button in the **Queries** sidebar group.
   *Result: The Events Query screen displays.*
2. Click on the button labeled **Click here to add a new condition**.
   *Result: A query condition is added stating Event # equals <empty>.*
   *Note: To remove a condition added by mistake, click the ellipse button to the left of the condition and select **Remove Condition**.*
3. Click on the words **Event #** in the condition and choose any condition from the drop-down list.
   *Result: You are establishing the first criterion for your query.*
4. **[Optional]** Click the word **Equals** next to your criterion and choose any option.
   *Note: For example, when querying by date, you can choose such conditions as Event Date is Less Than (or Greater Than) a particular date or Event Date is Between one date and another.*

5.  Click the final word in the condition and choose a value for the condition to be compared to.
    *Note: These lists are dynamic. If you are searching by Event Theme, then this list will be your quick-pick list of themes. If you are searching by date, you will be provided with a drop-down calendar to assist you in picking dates.*

6.  Add as many query conditions as desired, repeating Steps 2-5.
    *Note: You can query records that match one condition **or** another, or records that do not match any conditions you set, etc. See below for more details.*

7.  Click the **Perform Query** button (lightening bolt) ⚡.
    *Result: Your results will display in a grid in the lower pane of the Events Query screen.*

*Tip: Sort your query conditions alphabetically by clicking the **Settings** button at the top right of the window and choosing **Sort Criteria Fields.***

**Image 3.1: Running an Events Query**



## Using Relative Date Ranges in an Events Query

*Concept:*

**See Image 3.2**
Relative date ranges are an excellent way to set common date ranges for your query. These ranges are always relative to the current date (*yesterday*, *this week*, *next month*, etc.). There are two benefits to using a relative date range, as opposed to choosing specific dates for your range. First, it's obviously faster and easier. Secondly, and perhaps most important, you can save queries with relative date ranges and pull them up at any future time. "This month," after all, will mean the current month, no matter what date you run the query.

1.  Click the **Events Query** button in the **Queries** sidebar group.

2. Click on the button labeled **Click here to add a new condition**.
3. Click on the words **Event #** in the condition and choose **Event Date** from the drop-down list.
4. Click the word **Equals** next to your criterion.
   *Result: A list of comparison options drops down.*
5. Select the relative date range you would like to use for this query.
   *Note: Relative date ranges are date ranges that are relative to the current date. Examples include: yesterday; this week; next month; last year; past; future; etc.*
6. Click the final word in the condition and choose a value for the relative date to correspond with.

7. Click the **Perform Query** button [icon].
8. *Result: The query returned all results from an event date which occurred within the relative date range you specified.*

## Using the In/Not In Comparison in an Event Query

*Concept:*

**See Image 3.2**    Use the In/Not In comparison to further structure your query to return very specific data; with the In/Not In comparison, you are able to specify multiple values and the query will return any that are in the list.

1. Click the **Events Query** button in the **Queries** sidebar group.
2. Click on the **Click here to add a new condition** button.
3. Click on the words **Event #** in the condition and choose **Sales Rep** from the drop-down list.
4. Click the word **Equals** next to your criterion.
5. Select "in" from the comparison drop-down list.
6. Select a sales representative from the drop-down list.
7. Click the **Click here to add a new condition** button.
8. Click on the words **Event #** in the condition and choose **Category** from the drop-down list.
9. Click the word **Equals** next to your criterion.
10. Select "not in" from the comparison drop-down list.
11. Click the final word in the condition and choose a category that the sales rep is to be excluded from ("not in.")

12. Click the **Perform Query** button [icon].
    *Result: The query returned all results from an event date which occurred last month, in which John Smith was the sales rep, and in which the category was not Industrial.*

**Image 3.2: Using Relative Dates and In/Not In to Refine a Query**
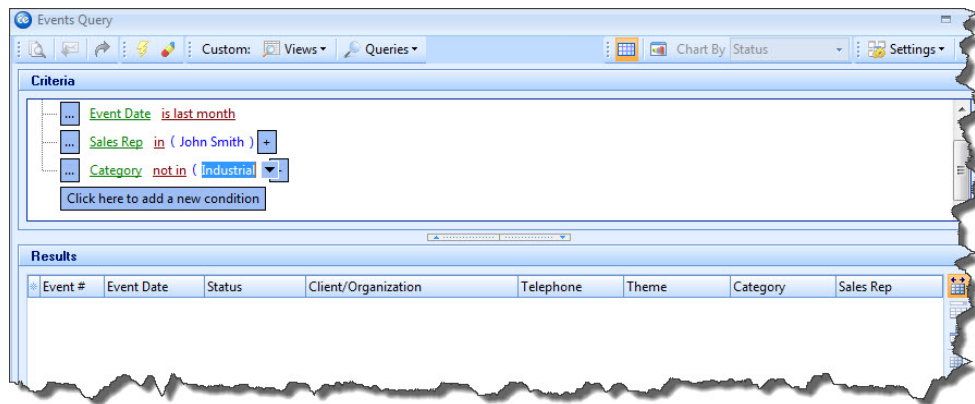


## Changing the Conjunction in a Query

*Concept:*

**See Image 3.3**  Conjunctions are every bit as important in a Caterease Events Query as they are in everyday language. For example, imagine you wanted to find all events you have with a theme of Meeting **or** Seminar. That is very different from telling the program to find all events with a theme of Meeting **and** Seminar. (Incidentally, the latter would yield no results, since no event can have a theme that is both Meeting **and** Seminar.) Therefore, as in speaking, you've got to choose the correct conjunction!

**Image 3.3: Changing Conjunctions in a Query**
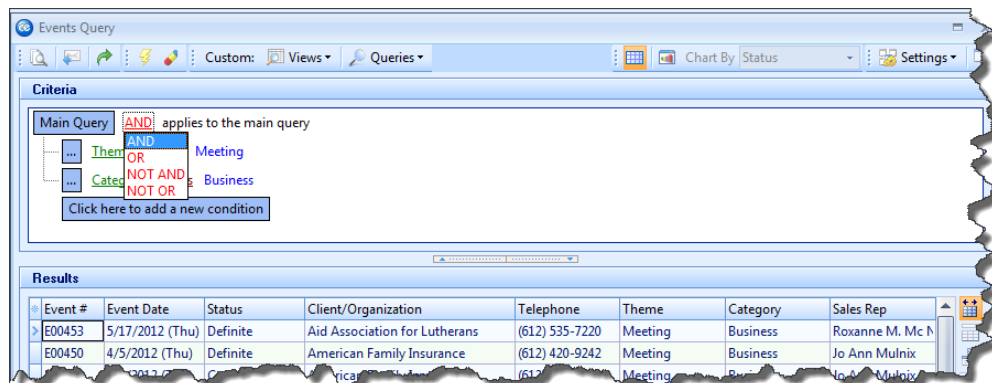


1. Click the **Events Query** button from the **Queries** sidebar group.
2. In the Criteria pane at the top of the Events Query window, click the word **AND** in the line "AND applies to the main query."
   *Result: A drop-down list of options displays.*
3. Select the desired option for your query (*see Table 3.1)*.
4. Establish your query conditions as described in Steps 2-5 under "Adding Query Conditions," above.

5.  Click the **Perform Query** button ⚡.

## Grouping Query Conditions

*Concept:*

**See Image 3.4**      While you can easily create a query to search for records with one quality **or** another (for example, events with a theme of Meeting **or** of Seminar), you might want to get a little more creative. For example, what if you want to find events with a theme of Meeting, but only those belonging to you **or** your assistant? Or perhaps you want to find all of your events that took place last summer **or** the summer before. In these cases, you will likely need to group your query conditions as described in this topic.

**Image 3.4: Grouping Query Conditions**
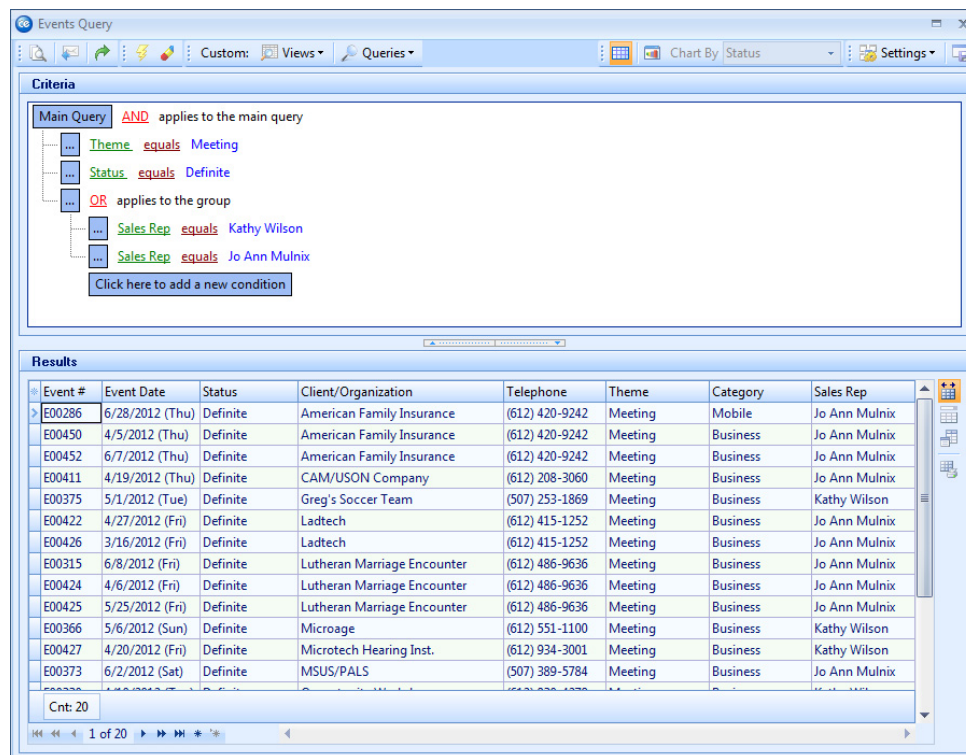


1.  Create a basic query as desired following the steps outlined under "Adding Query Conditions," above.
2.  Click the small ellipse button to the left of one of your query conditions.
    **Result:** *A pop-up menu opens.*
3.  Click **Add A New Group**.
    **Result:** *A new group is created with the default first condition of "Event # equals <empty>" and preceded by the statement "AND will apply to the following conditions."*

4.  Click the word **AND** in the line "AND applies to the following conditions" at the beginning of your new group.
    ***Result:*** *A drop-down list of options displays.*
5.  Select the desired option: **And**, **Or**, **Not And** or **Not Or** (*See Table 3.1 for more details*).
6.  Click on the words **Event #** in the first condition of your new group and choose any condition from the drop-down list.
    ***Result:*** *You are establishing the first criterion for this new group of conditions.*
7.  Click the word **Equals** next to your criterion and choose any option.
8.  Click the final word in the condition and choose a value for the condition to be compared to.
9.  Click the button labeled **Click here to add a new condition**.
    ***Result:*** *A new query condition is added to your group.*
10. Repeat Steps 6-8, as necessary, to add more conditions to your group.
11. Click the **Perform Query** button .

**Table 3.1: Query Conjunctions**

| Term | Description |
| --- | --- |
| **AND** | This option means the records that result from this query must match all of the conditions you create. |
| **OR** | This option means the records that result from this query can match any one of the criteria you set - either the first condition OR the second OR the third, etc. |
| **NOT AND** | This option means the records that result from this query cannot match all conditions you set. They can match one or the other, but NOT the first AND the second AND the third, etc. |
| **NOT OR** | This option means the records that result from this query cannot match any of the conditions you set - NOT the first condition OR the second, etc. |

## Saving Custom Queries for Future Use

*Concept:*

**See Image 3.5**  If there are queries you need to run on a regular basis — perhaps every month you need to track those events with a theme of Meeting and a status of Definite, for example, you can create those queries just once and then save them for future use.

**Image 3.5: Saving Custom Queries**
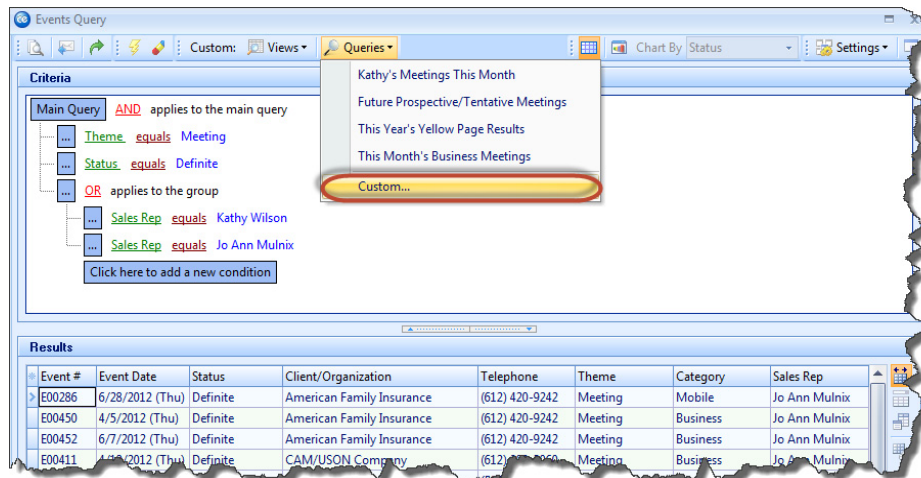


1. Create the query you want to save using the steps outlined in the above sections.
2. Click the **Queries** button at the top of the Events Query window.
   *Result: A drop-down list of options displays.*
3. Click **Custom**.
   *Result: The Custom Queries window opens.*
4. **[Optional]** Click the **Shared** button at the bottom left of the Custom Queries window if you want this query to be shared with other Caterease users on your network.
   *Note: By default, the **Local** button is selected, meaning this query will be available only on your machine.*
5. Click the **Add Query** button .
   *Result: A new line is added to your list of queries with the default name of "New Query."*
6. Type a name for your custom query.
7. Click the **Save Current Query** button .
   *Result: Your current query conditions are saved.*

## Querying Your Customer Database

*Concept:*

**See Image 3.6**    In addition to querying events, you may want to query your list of customers as well. For example, you may want to determine how many customers you have who do not have fax numbers on record with you; or how many customers heard of you from a particular reference; or how many customers are corporate clients, as opposed to government or educational entities. Any of these conditions, and more, can be used in your Accounts Query tool.

*Tip: Click the plus sign to the left of any record in your query results to see details of events associated with that customer.*

**Image 3.6: Querying Your Customers**



*Tip: Remember that all the tools you have learned: using conjunctions in queries, grouping query conditions, saving custom queries, etc., can be used in the Accounts Query as well.*

1. Click the **Accounts Query** button from the **Queries** sidebar group.
   *Result: The Accounts Query screen displays.*
2. Click on the button labeled **Click here to add a new condition**.
   *Result: A query condition is added, stating Client/Organization equals <empty>.*
3. Click on the word **Client/Organization** in the condition and choose any condition from the drop-down list.
4. Click the word **Equals** next to your criterion and choose any option.
5. Click the final word in the condition and choose a value for the condition to be compared to.
   *Note: These lists are dynamic. If you are searching by* Category, *then this list will be your list of account categories. If you are searching by* Client, *this list will be all of the clients in your database.*
6. Add as many query conditions as desired, repeating Steps 2-5.
   *Note: As with the Events Query, above, you can query for records that match one condition **or** another, or records that do not match any conditions you set, etc.*

7. Click the **Perform Query** button.
   *Result: Your results will display in the lower pane of the Accounts Query screen.*

## Querying Your Prospective Customers

*Concept:*

**See Image 3.7**

Your Prospects Query helps you separate your prospective customers (leads) from your active ones. Therefore, this query differs from the previous one because it also contains your list of prospective customers, so you can more easily market to them.

*Tip: In this query, the condition "Account" has two options: True and False. This condition helps you determine which of the company names in your program are active clients as opposed to merely leads.*

**Image 3.7: Querying Your Prospects**
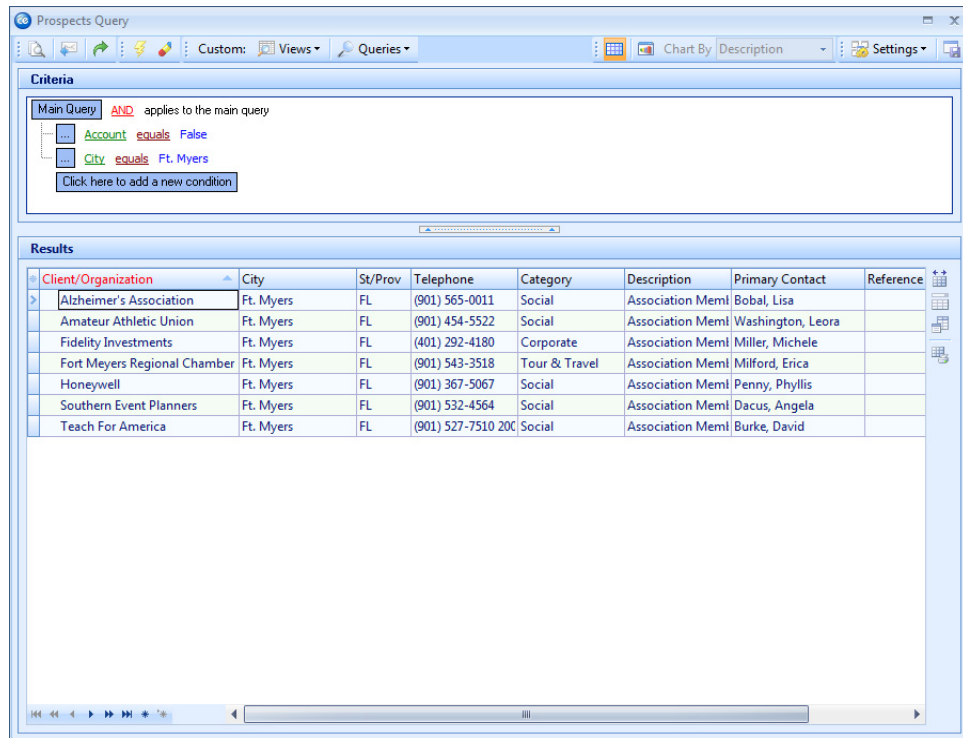


1. Click the **Prospects Query** button from the **Queries** sidebar group.
   *Result: The Prospects Query window displays.*
2. Click on the button labeled **Click here to add a new condition**.
   *Result: A query condition is added stating Account equals <empty>.*
   *Note: See tip to the left for important information about the condition "Account."*
3. Choose **False.** By selecting False, you are telling the system **not** to search for accounts.
4. Click the **Click here to add a new condition** button.
5. Click on the word **Account** in the condition and choose any condition from the drop-down list.
6. Click the word **Equals** next to your criterion and choose any option.
7. Click the final word in the condition and choose a value for the condition to be compared to.
   *Note: These lists are dynamic. If you are searching by Category, then this list will be your list of account categories. If you are searching by Client, this list will be all of the clients in your database.*
8. Add as many query conditions as desired, repeating Steps 2-5.
   *Note: As with the Events Query, discussed above, you can query for records that*

*match one condition **or** another, or records that do not match any conditions you set, etc.*

9.  Click the **Perform Query** button .
    ***Result:*** *Your results will display in the lower pane of the Prospects Query screen.*

## Remember This:

In this unit, you have learned a few very important concepts about creating your own custom queries. Here are some things you might want to jot down in the **Table of Things I Want to Remember** on the last page of this book:

*   *You can track the events in your program based on any condition or combination of conditions that you want (Page 3.1).*

*   *You can use special relative date ranges in your queries to find records based on the current date (Page 3.2).*

*   *You can use the In/Not In comparison to further limit return results (Page 3.3).*

*   *Just like in speaking, conjunctions make a big difference in your queries (Page 3.4).*

*   *You can apply more than one conjunction to a query by separating conditions into groups (Page 3.5).*

*   *You can save your custom queries for future use (Page 3.6).*

*   *You can track your customers using a query tool (Page 3.7).*

*   *You can even track your prospective customers using a query tool (Page 3.9).*

# Unit 4: Using Activity Queries

**Objectives:**

**Upon completing this unit, you will be able to:**

*   *Track all menu items ordered for any date range.*
*   *Use Relative Date Ranges in activity queries.*
*   *Print and customize food/service item labels.*
*   *Track all payment activity for any date range.*
*   *Track all staffing for any date range.*
*   *Track all sub-event activity for any date range.*

**Tracking Menu Item Activity**

**See Image 4.1**    *Concept:*

The Food/Service Activity Query is a flexible tool that allows you to track any menu items you have ordered for any day or date range. Using this powerful feature, you can filter, sort, and group your data to find answers to such questions as, "Which venue has sold the most rental equipment?" or "Which sales representative is doing the best with this month's wine contest?" All food, liquor, equipment, and service item revenue can be tracked any way you want.

*Note: All activity queries described in this section are available in the Professional version. For Express and Standard versions of the program, corresponding reports are available.*
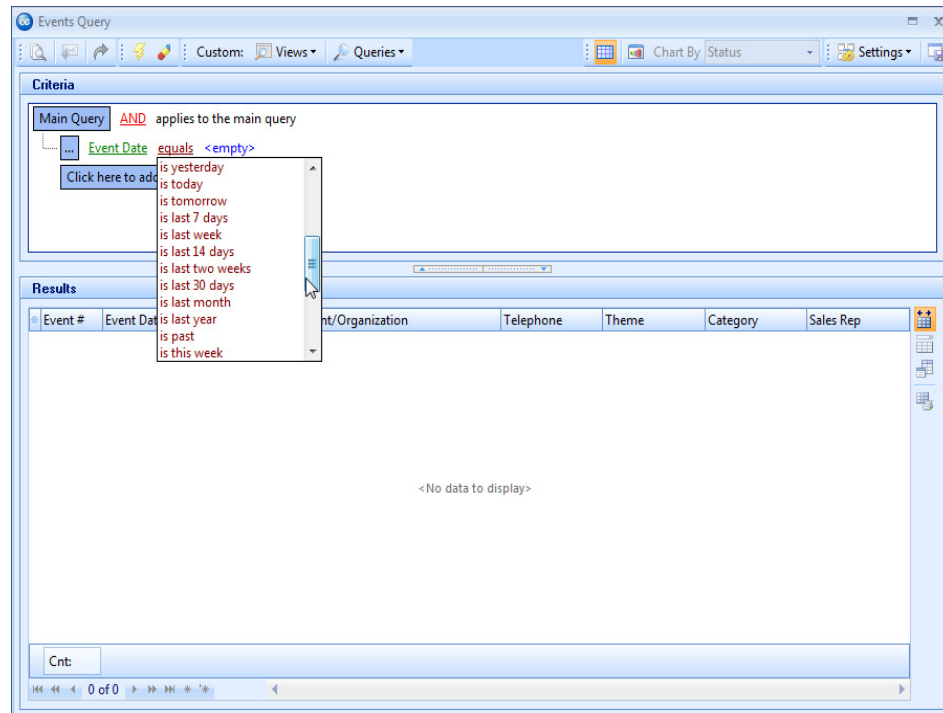
**Image 4.1: Food/Service Activity Query**



1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Food/Service Activity** button.
3. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query (see below).
4. **[Optional]** Choose to exclude items that have no quantities, or no modifiers, or ones that have been ordered for cancelled events, using the checkboxes at the lower left of the **Food/Service Activity Query** window.
5. Click **OK** to generate the query.

## Using a Relative Date Range

**See Image 4.2**     *Concept:*

As mentioned in the previous unit, relative date ranges are an excellent way to set common date ranges for your query. Again, these ranges are always relative to the current date, which makes them very flexible for querying information.

**Image 4.2: Using a Relative Date Range**



1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Food/Service Activity** button.
3. Click the radio button next to **Relative Date Range**.
4. Click the down arrow to the right of the **Relative Date Range** field and select an option from the drop-down list.
5. **[Optional]** Choose to exclude items that have no quantities, or ones that have been ordered for cancelled events, using the checkboxes at the lower left of the Food/Service Activity Query window.
6. Click **OK** to generate the query.

## Tracking Food/Service Items in Express and Standard Versions

*Concept:*

The Food/Service Items Report is available no matter what version of Caterease you have, and, although not quite as flexible as the query tool on the preceding pages, is nonetheless very flexible in its own right. This report allows you to track menu items ordered for events during any date range.

1. Click the **Reports** drop-down menu at the top of the Caterease screen.
2. Choose the **Management** sub-group.
3. Select the **Food/Service Items** Report.
4. Select a specific date or date range to track menu items for, or opt to use the relative date range options.
5. **[Optional]** Enter a custom title for the report.

6.  **[Optional]** Click the down arrow under <u>Exclude Status</u> and select one or more event statuses to be excluded from the report.
7.  **[Optional]** Click the down arrow under <u>Group By</u> and choose to group menu items by a particular detail.
    *Note: A second Group-By field is available if you want to group by a secondary detail.*
8.  [**Optional**] Click the checkbox under <u>Sort Order</u> for any item you would like to sort the report by.
9.  **[Optional]** Click the checkbox at the bottom of the window to optionally print a Separate Page for Each Group in the report.
10. **[Optional]** Click the checkbox at the bottom of the window to optionally Exclude Items Without Quantities.
11. Click **OK** to generate the report.

**Image 4.3: Food/Service Items Report**



## Printing Menu Item Labels

**See Image 4.4**     *Concept:*

Sometimes it's handy to have labels for your food/service menu items. Whether you are packing them for an off-premise event, or whether you just need a quick reference for chafers or trays, labels can be quickly generated from your Food/Service Activity Query.

**Image 4.4: Printing Menu Item Labels**
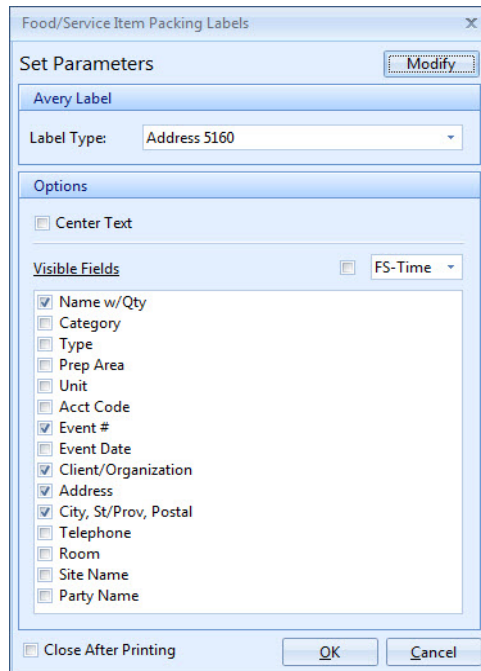


1. Generate a Food/Service Activity Query as described above.
2. Click a menu item in your query results grid to select it, or hold your **[Ctrl]** key or **[Shift]** key down to select multiple items.
   *Note: The [Ctrl] key lets you select multiple records; the [Shift] key selects two records and all others in between them. You can also click your right mouse button over the grid and choose **Select All Records**.*
3. Click the **Print** button at the top left of the query results window.
4. Click **Food/Service Item Packing Labels**.
   *Result: The Food/Service Item Packing Labels window displays.*
5. Click an Avery Label format from the **Label Type** drop-down to select it.
6. Choose the information you would like to display in the label by clicking into the desired checkboxes.
7. **[Optional]** Click the checkbox next to **Center Text**, under **Options**, if you want the text you chose in Step 6, above, to be centered on the label.
8. Click any checkbox or boxes under **Visible Fields** to choose which information you want to appear on the labels.
9. Click **OK** when finished.
   *Result: A Print Preview of the labels appears.*
10. Click the **Print** button to print the labels.


## *Modifying Menu Item Labels*

**See Image 4.5**      *Concept:*

At times, you may want to make a one-time-only modification to one or several of your menu item labels before you send them to the printer. Perhaps you need to

include a note on the label, or perhaps you need more than one label for a particularly large item. Modifying labels can be done easily from the Food/Service Activity Query.

**Image 4.5: Modifying Food/Service Item Labels**
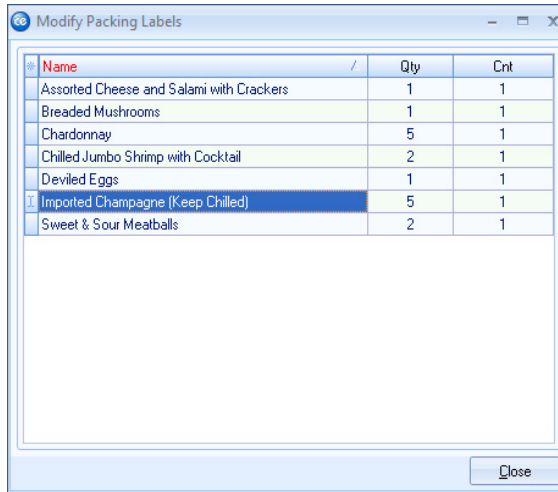


1. Follow Steps 1-8, above, to select your Avery label style and designate the optional information to appear on each label.
2. Click the **Modify** button at the top right of the Food/Service Item Labels window.
   ***Result:*** *The **Modify Packing Labels** window opens.*
3. Click in any column on the **Modify Packing Labels** window and edit the information as desired.
   ***Note:*** *These are one-time-only changes.*
4. Click **Close** when finished.
5. Click **OK** on the Food/Service Item Packing Labels window to generate your labels.

**Table 4.1: Modify Labels Options**

| Option | Description |
|---|---|
| **Name** | Type here to edit the name of a menu item as it appears on your label. For example, if a particular menu item cannot be packed into one box, you might add the words "2 Boxes" to the end of its name on the label (then see Cnt, below). Note that this number only appears on the label if "Name w/Qty" has been selected as an option. |
| **Qty** | This is the quantity of menu items included, and can be edited as desired. Note that this number only appears on the label if "Name w/Qty" has been selected as an option. |
| **Cnt/Unit** | If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary count or unit here, into their respective fields. Simply type as desired, and whatever number you type will be the number of labels generated for that item. |

### *Printing Bar Codes*

#### *Concept*

For Standard and Profession version users, you can enter bar codes for each of your various menu items, and have those bar codes optionally appear on any of your custom event prints or even on their own Bar Code Labels. This section discusses the latter topic, and assumes you have already entered your bar codes into Menu Manager or Event Manager.

*Note: To enter bar codes into Event Manager, click the Quick Column Customizing button on the Food/Service tab and select Bar Code. Type the bar code into the Bar Code field and save your changes.*

1. Generate a Food/Service Activity Query, as described previously.
2. Click a menu item in your query results grid to select it, or hold your **[Ctrl]** key or **[Shift]** key down to select multiple items.
   *Note: The [Ctrl] key lets you select multiple records; the [Shift] key selects two records and all others in between them. You can also click your right mouse button over the grid and choose Select All Records.*
3. Click the **Print** button at the top left of the query results window.
4. Click the **Food/Service Item Barcodes** button.
   *Result: The Food/Service Item Bar Code Labels window opens.*
5. Select an Avery label type by clicking the down arrow to the right of the Label Type field.
6. **[Optional]** Click into the checkbox next to Right Align Bar Codes if you would like the bar codes to be right-aligned.
7. Click **OK** when finished.
   *Result: A Print Preview of the bar codes appears.*
8. Click the **Print** button to print the bar codes.

## Tracking Payments Activity

**See Image 4.6**    Similar to the Food/Service Activity Query, the Payments Activity Query tracks all payments made to your company during any day or date range. Again, the same powerful grid tools are available, such as sorting, filtering, or grouping your data. Thus, you can use this tool to answer such questions as "Which sales representative has received the most credit card payments this month?" or "What has been my most common method of payment this year?"

**Image 4.6: Tracking Payments Activity**



1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Payments Activity** button.
3. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query (*see Page 4.2)*.
4. **[Optional]** Use the checkboxes at the lower left of the Payments Activity Query window to choose to exclude payments from events that have been cancelled, to include only events that have been closed, or to include payments made on group sleeping room bookings (for hotels, inns, etc.).
5. Click **OK**.

## Tracking Staffing Activity

**See Image 4.6**     *Concept:*

This query is designed to track all employees you have booked for any day or date range. As with the other activity queries, you can sort, group, or filter your data and answer various questions about your employee staffing activity.

**Image 4.7: Tracking Staffing Activity**



1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Staffing Activity** button.
3. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query (*see Page 4.2)*.
4. **[Optional]** Use the checkboxes at the lower left of the Staffing Activity Query window to choose to exclude employees scheduled for events that have been cancelled or to show separate records for compensation details.
5. Click **OK**.

## Tracking Sub-Event Activity

**See Image 4.8**    *Concept:*

This activity query is focused on your sub-events, in other words, the individual meals you have served. For example, you can use this to track how many "Dinner Buffets" you've had during a particular date range or which type of sub-event has generated the most revenue, etc.

1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Sub-Event Activity** button.

**Image 4.8: Tracking Sub-Event Activity**



3.   Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query *(see Page 4.2)*.

4.   **[Optional]** Use the checkboxes at the lower left of the Sub-Event Activity Query window to choose to exclude sub-events from events that have been cancelled, or sub-events that have no banquet room or off-premise site location information.

5.   Click **OK**.

## Remember This:

In this unit, you have learned a few very important concepts about tracking various activity in Caterease. Here are some things you might want to jot down in the **Table of Things I Want to Remember** on the last page of this book:

•   *You can track all menu items (food, liquor, equipment, etc.) you have ordered for an entire day or date range (Page 4.1).*

•   *You can use special relative date ranges to quickly perform common activity queries (Page 4.2).*

•   *You can print menu items labels from your Food/Service Activity Query (Page 4.4).*

•   *You can print bar codes from your Food/Service Activity Query (Page 4.7).*

- *You can track all payments you have received for any day or date range (Page 4.7).*

- *You can track all employees you have scheduled for any day or date range (Page 4.8).*

- *You can specifically track sub-events (as opposed to events in general) you have booked for any day or date range (Page 4.9).*

# Table of Things I Want to Remember

This table has been provided as a quick reference of things you've learned in this book. You can write notes to yourself, and include the corresponding page in the book that discusses that topic. That way, rather than skimming through this entire book to find important information you need, you can simply refer to this table, and then turn to the appropriate page when necessary.

| Notes | Page |
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# caterease™

catering & event management software