

Training Guide



Booking Your First Event

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TABLE OF CONTENTS

Unit 1: Introducing Caterease - General Concepts	
Ribbon Tab	5
Navigation Pane/Sidebar	6
Adding Records	9
Deleting Records	
Selection Tool	
Save Changes	11
Cancel Changes	11
Show Details Button	12
Unit 2: Booking a New Event with the Event Wizard	13
E-mailing an Event Print	26
Unit 3: Managing General Event Information	28
Event Fields	29
Sub-Event Fields	
Event Display	
Sub-Event Display	
Adding a Payment for an Event	
Editing an Existing Event Payment	40

Unit 1: Introducing Caterease - General Concepts

In this section, you will learn about general Caterease concepts:

Exploring the Ribbon Tab and Navigation Pane Using Data-Entry Tools: Quickpicks, Calendar, Calculator Overview of the Event Manager Display and Sub-Event Display Adding and Deleting Records Selecting Records from Established Lists Showing Details with the Magnifying Glass Saving or Canceling Changes



Exploring the Ribbon Tab and Navigation Pane

Caterease is designed to look and act like programs you use every day. In addition to common Windows standards, such as right-click pop-up menus, drag-and-drop features and other tools, Caterease uses familiar Ribbon Tabs and Navigation Panes to keep your learning curve small and get you up and running quickly.

Ribbon Tab

The Ribbon Tabs are located across the top of your screen, and offer important tools for use throughout your program:

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Main						

- Home Ribbon Tab Offers such tools as font formatting, navigation, and a context-sensitive list of tools.
- Select Ribbon Tab Offers an additional way to access various areas of the program.
- Reports Ribbon Tab
 Offers access to quick-access reports to track various information.
- Display Ribbon Tab
 - Allows you to make certain changes to the program's display.
- Administration Ribbon Tab

Offers access to program setup options.

• Help Ribbon Tab Offers access to the program's online help menu, video tips, and other assistance.

Navigation Pane/Sidebar

The Navigation Pane, or Sidebar, is a vertical bar that is displayed on the left-hand side of your desktop, and contains "hot buttons" which provide easy access to frequently used tools.



- Main Sidebar Offers access to the program's Managers.
- Tools Sidebar

Offers the popular Event Wizard and other handy tools.

• Queries Sidebar

Allows you to build custom queries to track any information you would like to see.

- Setup Sidebar Offers access to various setup features in the program.
- System Sidebar Allows you to manage deleted records, archive events, and more.

Using Data Entry Tools

Throughout the program there are many data-entry tools to make entering information easier and to help you avoid any repetitive typing.

Data can be entered in several different ways:

• Type and Hit [Enter] Type into any field and press your [Enter] or [Tab] key to move from field to field.

Custom Quickpick Lists

Click the down arrow next to various text fields to choose from customizable drop-down lists of options.

Events		Event Details				
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Client	Event Date 🔺 📍	Address	1661 Estero Blvd			
Acoustics Associates	1/30/2018 (Tue)	Telephone	(612) 544 8901			
Gustave A. Larson Company	1/30/2018 (Tue)	Email	info@acoustics.con			
PSS	1/30/2018 (Tue)					
Crow Wedding Reception	1/31/2018 (Wed)	🖽 Event 🛛 🗠 Sub	-Event			
Naples Dental Assoc.	2/3/2018 (Sat)					
Wiggins, Goodlette & Davis P.A	2/3/2018 (Sat)	General Miscellan	eous			
F.G.C.U.	2/5/2018 (Mon)					
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American Family Insurance	2/9/2018 (Fri)	Category	Banquet			Plar
CAM/USON Company	2/9/2018 (Fri)	Booking Contact	Wedding Reception			Acti
Greg's Soccer Team	2/11/2018 (Sun)	Site Contact	Retirement			Guz
East High School	2/12/2018 (Mon)	Site contact	Birthday Party			
		A Notes	Office Party			
		- Hotes	Wedding Ceremony			

• Drop-Down Calendars

Click the down arrow next to any <u>Date</u> field to access a drop-down calendar.

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AM/USON Company	2/9/2018 (Fri)	Booking Contact	Grover, Rochelle	Ŧ	Actual	Su	n Mon	Tue V	ed Thu	Fri	Sat	am)
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• Drop-Down Calculators

Click the down arrow next to any currency-related field to access a drop-down calculator.

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Adding and Deleting Records

Caterease keeps your learning curve small by keeping all buttons very consistent. The two most common features - adding and deleting records - can be done quickly with two prominent buttons.

Adding Records

Anytime you want to add anything new in the program you will click a "green plus sign" button. Located in numerous places throughout the program, the **Add Record** button lets you add events, add clients, add custom menu items, and more.

Deleting Records

Anytime you want to delete anything in the program, you will click a "red minus sign" button. The **Delete Record** button is located throughout the program, and allows you to delete events, delete clients, delete menu items, and more.



Selecting Records from Pre-Set Lists

With Caterease, *you should never have to type the same thing more than once*. You can create default lists of information, such as default menus, default site locations, default tax rates, default checklists, timelines and more, and then select from those lists using the Selection tool (a button with a mouse cursor on it).

Selection Tool

Click the **Select** button throughout the program to select menu items, employees, site locations, tax rates, and more from default lists.

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Saving or Canceling Changes

Saving or canceling any changes you make throughout the program can be done easily using the following buttons: the Save Changes button or the Cancel Changes button, respectively. For the program's various Managers (Event Manager, Account Manager, etc.), these buttons can be found in the Home ribbon tab at the top of your screen. In other areas of the program, they can often be found at the top of a particular window.

Save Changes

Click the **Save Changes** button (diskette) to save any recent changes. If this button is currently disabled, there have been no changes since your last save.

× Cancel Changes

Click the **Cancel Changes** button (red X) to cancel recent changes and have the record you're working on revert back to its previously saved state. If this button is currently disabled, no changes have been made since your last save.

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Showing Details Using the Magnifying Glass

Another button consistently used throughout the program is the "magnifying glass" button, or Show Details button, which allows you to view additional details of different records, such as sub-events, contact people, and more.

Show Details Button

Click the **Show Details** button anywhere in the program to view additional/extended details of a particular record in a separate pop-up window.

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* Client Event Date 🔺		Address	1661 Est	ero Blvd	21	<u> </u>	Serv Chg			Sa	3.80	
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N A C M 1/28/2018 (Sun)		Email	info@ac	oustics.	con		Cost Per Guest			\$2	3.31	2
Microage 1/29/2018 (Mon)												
 Acoustics Associates 1/30/2018 (Tue) 		🖽 Event 🛛 🖽	Sub-Event							🗧 Closed 🛛 🔆	Allergy	
Gustave A. Larson Company 1/30/2018 (Tue)												%
P S S 1/30/2018 (Tue)		Description	Lunch Buffet	Ð	* Item Name			Price	Qty	Total		6
Crow Wedding Reception 1/31/2018 (Wed)		Date	1/30/2018 (Tue)	A	Supreme But	ffet		\$18.95	25	\$473.75		5
Naples Dental Assoc. 2/3/2018 (Sat)		Start	11:00 AM		All Linen Na	pkins		\$50.00	1	\$50.00		
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Ladtech 2/14/2018 (Wed)					Label	choice of two (2) salad	ds, deluxe vegetabl	e and chees	e tray, ro	olls and		
Naples Dental Assoc. 2/17/2018 (Sat)						butter, dessert, coffee	e or tea					
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Unit 2: Booking a New Event with the Event Wizard

In this section, you will learn:

Selecting a Client and Contact Person for the New Event Entering Basic Event Details Selecting Menu Items for the New Event Emailing an Event Print

Event Wizard, Step 1: Selecting a Client

When booking an event using the Event Wizard, the first step is to choose the customer (or add the customer). You can quickly search through your existing customers by name, or you can use a Finder tool to search based on any client detail. Or, when necessary, you can add a brand-new client.

Searching for an Existing Client by Name

- 1. Click the **Tools** sidebar group, located on the left-hand side of your screen.
- 2. Click the Event Wizard button.

Result: The Event Wizard tool opens on the Step 1: Select An Account & Contact Person window.

Note: You can also access the **Event Wizard** button from the upper left-hand corner of your screen or from the **Select** ribbon tab.

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k	Client		City	/	St/Prov	Telephone	1	C
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	Aid Association for L	utherans	Ft. I	Myers	FL	(612) 535-7220	(
	American Family Ins	urance	Ft. I	Myers	FL	(612) 420-9242	(Ē
	Bass Inc.		Ft. I	Myers	FL	(612) 272-9530	(2
	CAM/USON Compar	ny	Nap	oles	FL	(612) 208-3060	(
	Chamber of Comme	rce	Ft. I	Myers	FL	(612) 540-0234	(
	Collier County Bank		Nap	oles	FL	(239) 444-8888	(
	Crow Wedding Rece	ption	San	ibel	FL	(239) 472-0011	(
	Cruises & Vacations, Inc.			Myers	FL	(612) 835-5575	(
	David Ames & Assoc	iates	Ft. I	Myers	FL	(612) 595-8970	(
	Diebold Co.		Ft. I	Myers	FL	(612) 378-4000	(
	Diebold Company		Ft. I	Myers	FL	(612) 378-4000	(
	Ducks Unlimited		Ft. I	Myers	FL	(612) 645-6446	(
	Dvorak Reception		Nap	oles	FL	(612) 437-0783	(
	East High School		Nap	oles	FL	(218) 863-2911	(
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	Miller	Susan		President		(612) 544-8901		
-	≪ < 1 of 2 ► ₩	₩ * *						

3. Click into the <u>Search For</u> field at the top left of the window and begin typing the name of your desired account.

Result: You are scrolled to a match as you type.

Note: You can use the Account Finder tool (binoculars) to search for clients by any detail, or choose to add a new client. See topics below.

- 4. **[Optional]** Select a default contact person for the new event from the list of options in the **Contacts** pane at the bottom of the window.
- When finished, click Next at the bottom right of the Wizard tool to move to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

Tip: Click the down arrow to the right of the Next button to access any custom Wizards that have been created.

Using the Account Finder Tool

1. Click the **Search Records** button 🤲 , located at the top of the Step 1: Select An Account & Contact Person window.

Result: The Account Finder window opens.

Account Finder		×
🧢 Clear Criteria		Show Results 🔶
Search By Fields		Search Rules
Account # Account ID Client Address Address (Oth	Sunset	Starts With Exact Match Anywhere In Field Sounds Like
City St/Prov Postal County		Multiple Field Operator And Or
Formatted Text Notes Directions Allergy		Search Prefixes
✓ Contact Fields Last First Title Telephone		Ine
Auto Complete k	(ey Numbers	
Find Records		Close

- 2. In the **Search By Fields** area, type the text you would like to search for. *Note:* You may search by more than one field.
- In the Search Rules area, select the appropriate rule.
 Note: Confirm that Ignore Case is selected if you want to ignore capitalization when you enter your text.

- Starts With The field you chose in the Search By Fields area starts with the words or letters you typed.
- Exact Match The field you chose in the Search By Fields area contains exactly the words you typed (and nothing else).
- Anywhere in Field The words or letters you typed appear anywhere in the field you chose in the Search By Fields area.
- **Sounds Like** The words or letters you typed match phonetically to the words in the field you chose in the **Search By Fieds** area.
- 4. **[Optional]** Click the radio button next to **And** or **Or**, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.
- 5. **[Optional]** Click into the **Include Prefixes** checkbox and then type the prefix (A, An, The) into the fields within the **Search Prefixes** section if you would like to include prefixes in your search.
- 6. Click the **Find Records** button, located at the bottom left-hand side of the window.
- [Optional] Click the Show Results/Hide Results button (arrow) at the top right of the Account Finder window to display a list of all records your search has retrieved thus far. Note: Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Finder tool down.
- 8. **[Optional]** If you accidentally skip over the record you want, click the arrows on either side of the **Find Records** button to move forward or backward.
- 9. Once your record is located, click **Close**. *Result:* The Finder window closes and you are positioned on the record you sought.
- 10. **[Optional]** Select a default contact person for the new event from the list of options in the Contacts pane at the bottom of the window.
- 11. Click **Next** at the bottom right of the Wizard tool to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

Adding A New Account for the New Event (Optional)

- Click the Add New Account button , located on the upper right-hand side of the Step 1: Select An Account & Contact Person window.
 Result: A confirmation prompt appears.
- 2. Click **Yes** to confirm. *Result:* The Account Details window opens.

General	Client	New Acco	unt		
Miscellaneous	Address				
Notes	City	Naples			
Allergy	St/Prov	FL		Postal	
Directions	Telephone	() -			
Picture	Fax	() -			
	Cellular	() -			
	Email				
	Email				
* Last	Email		Title	Telephon	e

- 3. Enter a name into the <u>Clientfield</u>, and press your **[Enter]** key. *Result:* Your cursor moves to the next field.
- Fill in additional account information as desired by typing into each field and pressing [Enter] to move from field to field.
 Note: Information on the Miscellaneous tab ("Category," "Reference," etc.), can be used to track this customer.
- 5. **[Optional]** Click the Add A New Contact button a new contact person for your new client.
- 6. When finished entering details for the new client, click **OK** at the bottom of the Account Details window.

Result: You are taken back to the account selection screen, with the new account you added highlighted.

 Click Next at the bottom right of the Wizard tool to move to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

Event Wizard, Step 2: Entering Event Details

The second step of the Event Wizard has you filling out the basic details of your new event. This entire window can be customized to suit your preferences, with fields being added, removed, or rearranged. You can even create multiple custom Wizards for each type of event you book at your company.

Entering General Details

- Enter Event and Sub-Event details into simple text fields such as <u>Party Name</u>, guest fields, etc., by simply typing into the fields as desired.
 Note: The <u>Party Name</u> can be set to default as the name of the client, and the <u>Guaranteed</u> guest field can be set to default to a certain percentage of the <u>Planned</u> number via the <u>Managers</u> tab in your Global Settings.
- 2. Click the down arrow to the right of various fields to use available drop-down lists ("quickpicks"), when applicable.

Note: You can customize quickpick lists to suit your needs, and you can optionally assign default values for these fields.

Event Infor	mation							
Party Name	Sunset Technologies							
Sales Rep	John Smith		Ŧ		Reference	Repeat CI	ient	Ĺ.
Status	Tentative		-		Business Type	Repeat CI	ient	ľ
Theme	Banquet		-	:	Operation	Walk In		
Category	Social		-			Mailing Cold Con	tact	
						Wedding	Planner	
Sub-Event Ir	formation Site					Google Bridal Sho	w	
Actual Guarante	eed	SI E	ate tart nd			 Find Serving Bar 		* *
Sub-Eve	nt Information							
Descripti	on				-	Setup	01:00	+
Setup Sty	rle				•	Tear Do	wn 00:30	\$
					· · · ·]		
Room			-	-	-	1		

 Enter an event date by either typing into the <u>Date</u> field or by accessing the drop-down calendar to make a selection.

Note: Professional version users can enter words such as "Tomorrow," "Monday," or even "EOM" ("End

of Month") or "EOM+1" in lieu of dates.

Date	& Tim	nes —						0
Date	7/20/	2018		6	Frida	зу		
Start		Tuesday, January 30, 2018 🌲						*
End	€		Ju	ily 201	8		∢	*
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	24	25	26	27	28	29	30	
	1	2	3	4	5	6	7	
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	÷
	22	23	24	25	26	27	28	
	29	30	31	1	2	3	4	
		Т	oday		Clear	r		

Entering Times for the New Event

Entering Times by Hand

Enter times manually in the following formats:

- As a normal number for AM hours that is, type "9" for 9:00 AM, "11" for 11:00 AM, etc.
- As a four-digit number for any other times that is, type "0930" for 9:30 AM or "0930" and a "P" for 9:30 PM.
- Click in the hours, minutes, or AM/PM area of the time field and use the upand-down arrows at the right of the field to make changes.

Entering Times Using the Time Wizard

- 1. Click the **Time Wizard** button **2**.
- 2. Hold your left mouse button down on one of the time-setting bars and drag to the left or right. *Result:* The time-setting bar moves with your mouse pointer.

Tip: The time and banquet room details you are adding here are for the first sub-event (or meal) of your new party. If the party will have multiple sub-events, you can create additional ones once the Wizard brings you into Event Manager.

Time Wizar	rd																Х
am 9 10	pm	1	2	3	4	5	6	7	8	9	10	11	am	1	2	3	4
	Start:	12:00 Servir	pm End: ng: 01: 0 pm	04:00	pm												
												[<u>(</u>	<u>)</u> K		<u>C</u> ance	el

- 3. Release the mouse button when the time is set as you want it. *Note: To remove a time that has been set, click the time-setting bar with your right mouse button.*
- 4. Click **OK** when finished.

Result: The times are entered into the corresponding fields in your Event Wizard. **Note:** Time field names can be customized.

Important Note: <u>Setup</u> and <u>Tear Down</u> time fields are entered as hours and minutes, not as actual times. The total time of a party will be calculated as its "Start" time minus any "Setup," until its "End" time plus any "Tear Down."

Entering Room Information

1. In the Event Wizard, fill out guest, date, and time information as described above.

Note: Caterease automatically tracks room availability based on date, time, and guest count; it is therefore best to enter that information prior to choosing a room.

Tip: If a room is not available, you can place a party on a "wait list." Once the venue becomes available, you will be notified of parties waiting.

- 2. Click the down arrow to the right of the <u>Setup Style</u> field, and select a setup style from the corresponding quickpick list.
- 3. Click into the Room field.
- 4. Click the down arrow located at the right of the <u>Room</u> field, and select a room from the corresponding list.

Result: Your selection is entered in the field, and an associated room charge may default in the next field (depending on your setup).

Note: The number to the right of each room name in the drop-down list indicates the maximum capacity of guests in that room for the setup style you selected in Step 2, as per your program's setup. N/A indicates that the selected setup style is not recognized for that room.

G Step 2: S	elec	t Event Fields			×
Event Inform	mati	on			
Party Name	Sur	iset Technologies			
Sales Rep	Joh	n Smith	Ŧ	Reference	Mailing 👻
Status	Ter	ntative	-	Business Type	On-Premise 🔻
Theme	Bar	х			^{II} verside Banquet Center 👻
Category	Soc	Ballrooms			
		Ocean		210	
Sub-Event In	for	Sand		70	
ŕ		Sun		70	
Guests -		Sea Cond Cur		/5	
Planned		Sand-Sun		140	✓ Wednesday
Actual		Meeting		140	
Guarante	ed	Subset Rooms		(NA	Serving 01:00 PM 📮
Guarante		Terrace		70	Bar 12:30 PM 2
Cub Fue		Royal Palm		180	
Descriptio	on	Sea Oats		180	Setup 01:00 🜲
Setup Sty	Setup Style				Tear Down 00:30 🜲
Room				×	
Room Ch	g [*	
🕜 Get Mor	e He	elp		Previous	OK Cancel

- 5. **[Optional]** Click into the <u>Room Charge</u> field and enter a room charge, or simply accept the default. *Note: Default room charges are established in your program's setup.*
- [Optional] Click into the <u>Setup</u> or <u>Tear Down</u> fields and enter the amount of time needed to set up or tear down the room.
 Note: Setup and tear-down times are not entered as times of day, but rather as the number of minutes or hours required to set up or tear down the room.
- 7. When finished, click **OK** to save your changes and close the window.

Using the Room Selection Wizard

- In the Event Wizard, fill out guest, date, time, and setup style information as described above.
 Note: The Rooms Selection Wizard automatically uses this information to select the most appropriate room for an event; it is therefore best to enter these details first.
- Click the Room Selection Wizard button (ellipsis), at the right of the <u>Room</u> field. Result: The Select Room window opens, with the best-matching room for your sub-event highlighted in green, and rooms with conflicts (double-booking, capacity) noted with red font.

Se	ect Room For Wedne	esday, February 7, 20	18 (11:0	0 am - 04	k:30 pm)	×
œ	View -					
*	Room View C	onflicts im Categon	Max	Var	Notes	
	 Location : Ballroom 	oms			Projector a	nd ilable in
	Meeting	Meeting	NA	NA	room	
	- Setup Style Does	Not Apply To Room			loom.	
	Ocean	Ballroom	210	110		
	Sand	Ballroom	70	-30		
	- Capacity Overloa maximum capacity	d … The Sand room of 70 for a Banquet s	has a etup sty	/le.		
Þ	Sand-Sun	Ballroom	140	40		
Π	Sea	Ballroom	75	-25		
	- Capacity Overloa capacity of 75 for a l	d … The Sea room h Banquet setup style.	as a max	a mum		
	Sun	Ballroom	70	-30		
	- Capacity Overloa capacity of 70 for a l	d … The Sun room h Banquet setup style.	as a ma	ximum		
	Sun-Sea	Ballroom	140	40		
	▲ Location : Sunse	t Rooms				
	Royal Palm	Meeting	180	80		Stratt and
	- Booked # E0018 am to 11:00 pm	84, Royal Palm room	, from 1	1:00		
	Sea Oats	Meeting	180	80		
	100 (Pln)				<u>O</u> K	<u>C</u> ancel

- 3. [Optional] Click the View Conflicts button to review specific room conflicts (indicated by red font).
- 4. **[Optional]** Select another room if you do not want to accept the recommended one.
- [Optional] Click Settings > Conflict Settings to optionally have the Wizard ignore booking conflicts or capacity conflicts. This button is located on the upper right-hand side of the window.
 Note: You can also choose Settings > Allow Selection Of Unavailable Rooms to be able to choose rooms in the Wizard despite conflicts.
- 6. Click **OK** at the bottom of the Select Room window to accept the selected room. *Result:* The selected room and its details (Room Charge, etc.) auto-populate into the Sub-Event display.
- 7. When finished, click **OK** to save your changes and close the window.

Entering Off-Premise Site Information

- In the Event Wizard, click the Site tab.
 Result: The Site tab and its information are displayed.
 Note: Site location fields are generally displayed on this tab, but they can easily be moved anywhere in the window. You can have this information default for you based on the client you chose for the event.
- Click into the <u>Site Name</u> field and type a site location name as desired. *Note:* You can also select commonly used site locations from your Site Location Database (see topic below).
- 3. Press the [Enter] key on your keyboard. *Result:* Your cursor moves to the next field.

🕲 Step 2: S	Select Event Fields						\times
🤛 Layouts 🕶						: ;;	
Event Infor	mation						
Party Name	Sunset Technologies						
Sales Rep	John Smith	-]	Reference	Mailing		-
Status	Tentative	-		Business Type	On-Premise		-
Theme	Banquet	•] :	Operation	Riverside Bar	nquet Center	-
Category	Social	•]				
Name Address	Cambier Park 735 8th St S				Delivery Time	11:00 AM	
Site Info	rmation Cambier Park				Delivery Time	▼⊟ ≗ 11:00 AM 📫	
Address	/35 8th St S						
City	Naples			St/Prov FL	Po	stal 34102	
O irectio	ons						
Exit 16 off of route 75 - (right off ramp) Pine Ridge road for 5 miles - South (left) on route 41 - stay on for 4.5 miles Right on Banyon (west) Right on Gulf Shore Blvd (1.1 miles)							
Park's or	n the left side						~
🕜 Get Mo	re Help			Previous	ОК	Can	cel

Tip: Once you've typed all the details of a site location and its directions, you can quickly add it to your database of commonly-used site locations (for future use) by simply clicking **Tools** > **Site Location** > **Add To Site Locations Database** at the top of the Sub-Event window.

- 4. Type an address, city, state, postal code, and optionally enter a Delivery Time, pressing [Enter] after each one to move from field to field.
- 5. **[Optional]** Click into the **Directions** text box at the bottom of the window and type directions to the location as desired.

Note: Format text on this tab by highlighting the text, right-clicking, and choosing **Font**.

6. When finished, click **OK** to save your changes and close the window.

Selecting Locations from the Site Location Database

- Click the Site tab on the Sub-Event window.
 Result: The Site tab and its information are displayed.
 Note: Site location fields are generally displayed on this tab, but can be moved anywhere in the window. You can have this information <u>default for you based</u> on the client you chose for the event.
- 2. Click the **Select Site Location** button **i**, located at the top right of the **Site** tab. **Result:** The Select Site Location window opens.

Select Site Location				\times
Search For	×			Ľ
* Name	*	City	St/Prov	
Cambier Park		Naples	FL	**
F.G.C.U. Library		Ft. Myers	FL	間
Holiday Inn Downtown		Naples	FL	비비
Museum		Naples	FL	
		<u>O</u> K	<u>C</u> ance	el .

- Locate the site location you want by typing its name in the Search For box at the top of the window. Note: As a default, your list of locations is sorted by "Name." You can sort by another column on this window ("City," "St/Prov") and search by that detail.
 Select the location (if not closed uselected) and click OK.
 - 4. Select the location (if not already selected) and click **OK**. *Result:* The site location and its directions will be retrieved into the Event Wizard.

Note: Remember, you should never have to type the same thing more than once. When entering a new site location, click the **Save Site Location** button (diskette) to save the details. You can also click the **Copy Site Location from Client** button, located to the right of the **Save Site Location** button, to copy the client address into the Site address.

Tip: You can enter site location information directly into the window and copy it to this Site Locations Database (see topic above), or add locations to the database itself.

Event Wizard, Step 3: Entering Menu Details

Once you have entered basic event information into the Event Wizard, Caterease creates your new event and opens it in Event Manager. It then asks if you'd like to select menu items for the party. The steps below walk you through the menu-selection process.

Selecting Menu Items for the New Event

 After completing Step 2 of the Event Wizard, click Yes on the informational message which prompts you to select your menu items for your new event.
 Result: The Select Menu Items For Current Event window opens.

Note: If the message is no longer visible, click the **Select Menus** button , located on the right-hand side of the **Sub-Event** display, on the **Food/Service** tab.

2. Click on a menu title in the left pane of the Select Menu Items For Current Event window. *Result:* Items in the selected menu are displayed in the main (right-hand) pane of the window.

Select Menu Items For Curre	ent Event	×
• 🕻 Search	it Select 📑	₩ • @
Breakfast	* Item Name	Price
Light Side	The Skyway Buffet	\$18.95
Lunch Buffet	Lite Start Buffet	\$15.95
Sides	Wyles Breakfast Buffet	\$17.95
Salads	Midwesterner	\$18.95 🗔
- Luncheon	Daybreaker	\$15.95
Dinner	Morning Delight	\$15.95
Dinner Buffet	Eye Opener	\$15.95
Hors D'Oeuvres	The Harbor Buffet	\$15.95
Hot	Wyle's Special	\$15.95
Cold		
Cold		
Tana		
Trays		
Desserts		
Breaks		
Bar		
Beverage and Treats		
Labor	₩ ≪ < 1 of 9 > >> >>>	
All Menus Search 🔻	<u>K</u>	<u>C</u> ancel

- 3. Highlight the food/service items you want to add to your event, and retrieve them in one of the following ways:
 - Double-click on a single item in the Select Menu Items For Current Event window.
 Result: The selected item is inserted at the bottom of your event's Food/Service grid, and the Select Menu Items For Current Event window remains open.
 - Hold your left mouse button down on a group of selected items and drag and drop them onto the Food/Service grid.
 Result: The selected items are inserted at the bottom of your event's Food/Service grid, and the

Select Menu Items For Current Event window remains open.

Note: Select a group of items by dragging your mouse over them or by holding the **[Shift]** or **[Ctrl]** key down on your keyboard as you click.

- Click the **Select** button at the top left of the Select Menu Items For Current Event window.
 Result: Any highlighted menu items are inserted at the bottom of your event's **Food/Service** grid,
 and the Select Menu Items For Current Event window remains open.
- Click OK.

Result: Any highlighted menu items are inserted at the bottom of your event's **Food/Service** grid, and the Select Menu Items For Current Event window closes.

Click the Insert Mode button to retrieve a menu item in a specific position on the Food/Service grid of your event.

Result: Once clicked, the feature is enabled, and all subsequently selected menu items are automatically placed above the currently highlighted item on the **Food/Service** grid (rather than always at the bottom); when dragging and dropping, **Insert Mode** allows items to be dropped anywhere at all on the **Food/Service** grid.

Note: Items can also be dragged and dropped up and down in the menu on the event's **Food/Service** grid, as well, regardless of the **Insert Mode** feature. **Insert Mode** can be enabled as a default

by clicking it once and then clicking the Save Window Settings button \square .

Important Note: As a quick way to locate menu items, click in the "All Menus Search" tool at the bottom left of the Menu Selection window and begin typing the name or partial name of the item. The selection tool will search for those letters throughout your default menus. Simply select any match to go directly to that menu item.

E-mailing an Event Print

You can quickly e-mail a print directly from any Print Preview screen.

E-mailing an Event Print

- From an event in Event Manager, click the Home ribbon tab, if it is not already selected, and then click the bottom half of the Prints button.
 Note: The Prints button is a split button. (Click the top half to select prints from a floating window.)
- **Tip:** E-mail from Caterease is automatically sent via your regular e-mail Outbox. Therefore, all return correspondence will be sent to your normal work e-mail address.
- 2. Choose from among General, Event Contracts/Invoices, or Event Subprints.
- 3. Click on the name of the desired print. *Result:* A Print Preview screen displays.
- Click the Email button, located at the top of the Print Preview screen.
 Result: Notice that the print is automatically attached as a PDF at the bottom of the e-mail window.
 You can change the format of this attachment by clicking on it with your right mouse button and selecting Change Type To and choosing a different type.

æ 📷 Contract for Quarterly Sales Meeting on Wednesday, March 7, 2018 - Message 🖬 — 🛙	ı ×
Message Contact History Templates	
Segoe Ul Light III A <th>8</th>	8
To Send Bcc Send Subject: Contract for Quarterly Sales Meeting on Wednesday, March 7, 2018	
Tuesday, March 6, 2018 Ladtech	
Attr: Bill Depisa Re: Contract for Your Event	
_ Dear Mr. Depisa,	
Attached is the contract for your Meeting you are holding in our Sand room on Wednesday, March 7, 2018 Please take a moment to review the details and then sign and return to me at your earliest convenience.	
Sincerely,	
Kathy Wilson	~
Contract.pdf	

- 5. The <u>To</u> field will automatically populate default e-mail addresses (although this feature can be disabled, if desired).
- 6. **[Optional]** Enter additional e-mail addresses into the <u>Cc</u> and <u>Bcc</u> fields, separating each address by semicolons.
- Type a subject for the e-mail into the <u>Subject</u> field, or click the down arrow at the right of the field to make a selection from the customizable quickpick list. *Note:* This quickpick is customized in **Setup** > **Quickpicks** > **General** > **Email Subject**.
- 8. Click into the large white text box of the e-mail window and type the body of your e-mail, or optionally insert a custom merge letter.
- 9. **[Optional]** Format the body of the e-mail by using the formatting tools at the top left of the window. Alternatively, highlight any text within the body of the e-mail, click your right mouse button, and choose **Font**.
- 10. When finished, click the **Send** button, located at the top left-hand side of the window, to send the e-mail.

Tip: In both the Standard and Professional versions of Caterease, you can create e-mail templates that can be customized, to include print and/or file attachments.

Unit 3: Managing General Event Information

In this section, you will learn:

Reviewing Event Manager Fields Reviewing the Event Manager Display Searching for Events Customizing Quickpick Lists Adding a New Sub-Event Selecting Staff for an Event Entering Special Requests or Comments

Reviewing Event Manager Fields

A multitude of fields are available to help you keep track of your events - and you can even make up additional fields (User-Defined Fields). These fields exist in Event Manager on either the Event or Sub-Event display. Below is a list:

Event Fields

Field	Description
Party Name	Used to identify an event; especially helpful when one client has multiple events.
Sales Rep	Shows the sales representative responsible for the event.
Theme	Allows you to track events by theme; (e.g. "Wedding Reception," "Christmas Party," "Sem- inar").
Reference	Lets you track your company's various marketing strategies; shows why the client booked this event (how they heard of you).
Category	Gives you an extra field for categorizing and tracking events; can be renamed to suit your specific business needs.
Booking/Site First	Identifies the first name of the booking and site contact people for the event; usually these names are directly associated with the client, and can be selected instead of repetitively typed.
Booking/Site Last	Identifies the last name of the booking and site contact people for the event.
Booking/Site Email	Identifies the booking/site contact's e-mail address.
Booking/Site Tel	Identifies the booking/site contact's telephone number.
Coordinator	Allows you to identify an event coordinator.
Primary Site Name	Identifies the first active sub-event's Site Location.
Primary Room	Identifies the first active sub-event's Room.
Event #	Offers a unique identifier for the event; this number is automatically assigned by the pro- gram.
Status	Indicates the status of the event: Prospective, Definite, Tentative, Cancelled, or Closed.
Cancel Type/Date	Lets you track why and when you lost business; available as sub-fields as the Status field.
Event Date	Indicates the date on which this event will (or did) take place.
Booked/Revised Date	Allows you to track the date on which this event was booked, and when it was last revised; available as sub-fields of the Event Date field.
Guests	Does not allow data-entry; displays the Actual guest count if one exists, and the Planned or Guaranteed count if one does not.
Planned	Indicates the number of guests the customer is planning for the event.
Actual	Indicates the actual number of guests who attended (or will be attending) the event.
Guaranteed	Indicates the minimum number of guests the customer is guaranteeing for the event; can be an automatic percentage of the Planned guest count.
Business Type*	Allows you to categorize events based on differing business models or if your company does business as more than one enterprise.
Subtotal	Identifies the subtotal for the entire event.
Gratuity	Identifies the total gratuity for the entire event.
Service Charge	Identifies the total service charge for the entire event.
Тах	Identifies the total tax for the event.
Total	Identifies the event total, including tax and service charge.
Cost	Identifies the total cost (to you) of the event; includes cumulative costs of menu items, as well as staffing and any miscellaneous cost adjustments.
Profit	Identifies the total profit for an event.
Paid	Identifies the total amount paid for an event.

Field	Description			
Balance	Identifies the currently outstanding balance for the event.			
Total Markup	Identifies the total markup of an event, automatically calculated by multiplying cost by a markup rate you identify.			
Operation*	Allows you to separate events based on DBA's, or different businesses or locations you might be running.			
Pay Method*	Identifies how the customer will pay (or paid) for the event.			
Cancel Charge*	Indicates the amount the customer will be charged if the event is cancelled.			
Members/Non- Members*	Used by private clubs to distinguish between guest types; can be renamed to suit your needs (e.g. "Adults," "Children").			
PO Number*	Identifies a purchase order associated with the event.			
Folio Number†	Identifies a folio number associated with the event.			
Closed ⁺	Lets you track a closed date for the event; optionally allows you to lock users out of closed events.			
User Defined Fields†	Allows you to create any additional fields you want to suit the specific needs of your company.			
* Displayed on Miscellaneous tab by default				

+ Not displayed by default

Sub-Event Fields

Field	Description
Description	Merges in the description of the event's first sub-event; e.g., "Dinner Buffet," "Meeting," "Breakfast," etc.
Туре	Merges in the type of the event's first sub-event, e.g., "On Premise," Off Premise," etc.
Time: Start	Merges in the start time of the event's first sub-event.
Time: End	Merges in the end time of the event's first sub-event.
Time: Delivery	Merges in the delivery time of the event's first sub-event.
Time: Serving	Merges in the serving time of the event's first sub-event. <i>Note: You can rename this field in</i> Administration > General > Customize Names > Times .
Time: Bar	Merges in the bar time of the event's first sub-event. <i>Note: You can rename this field in</i> Administration > General > Customize Names > Times
Time: Arrival	Merges in the arrival time of the event's first sub-event. <i>Note: You can rename this field in</i> Administration > General > Customize Names > Times
Time: Depar- ture	Merges in the departure time of the event's first sub-event. <i>Note: You can rename this field in Administration > General > Customize Names > Times.</i>
Time: NA	These two fields represent two extra time fields that you can make up yourself. They will each merge in the respective time information from the event's first sub-event.
Time: Staff In	Merges in the staff arrival time of the event's first sub-event. <i>Note: You can rename this field in Administration > General > Customize Names > Times.</i>
Time: Setup	Merges in the setup time of the event's first sub-event. <i>Note: This field, which displays as</i> <i>Hours and Minutes (not as a time), is set up in</i> Administration > New Booking Defaults > Sub-Events.
Time: Tear Down	Merges in the tear down time of the event's first sub-event. <i>Note: This field, which is set up in</i> Administration > New Booking Defaults > Sub-Events , displays as Hours and Minutes, not as a time.
Date	Merges in the date of the event's first sub-event.
Room	Merges in the name of the room of the event's first sub-event.
Room Chg	Merges in the room charge of the event's first sub-event.
Room Cat- egory	Merges in the room category of the event's first sub-event.
Setup Style	Merges in the setup style of the event's first sub-event.
Site Name	Merges in the name of the off-premise site location of the event's first sub-event.
Site Address	Merges in the address of the off-premise site location of the event's first sub-event.
Site City	Merges in the city of the off-premise site location of the event's first sub-event.
Site St/Prov	Merges in the state or province of the off-premise site location of the event's first sub-event.
Site Postal	Merges in the postal/ZIP code of the off-premise site location of the event's first sub-event.
Site Tele-	Merges in the telephone number of the off-premise site location of the event's first sub-event.

Field	Description
phone	
Site Dir-	Merges in all text in the Directions text box of the event's first sub-event, complete with rich-
ections	text formatting.
Site Dir-	Merges in all text in the Directions text box of the event's first sub-event, without any format-
ections	ting (so it adopts the formatting of the merge document).
(Unformatted)	Manage in all but is the Nates but have fithe City Leasting Database (Catum
Site Notes	 > Site Locations), complete with rich-text formatting.
Site Notes	Merges in all text in the Notes text box of the Site Location Database (Setup > Site Loca -
(Unformatted)	tions) without any formatting (so it adopts the formatting of the merge document).
Site Descrip-	Merges in all text in the Description text box of the Site Location Database (Setup
tion	> Site Locations), complete with rich-text formatting.
Site Descrip-	Merges in all text in the Description text box of the Site Location Database (Setup > Site
tion (Unformatted)	Locations) without any formatting (so it adopts the formatting of the merge document).
(Uniormatteu)	Morgon in the name of the cite category. This is a sustemizable quicknick list
Site Calegory	Merges in the website address of the off promise site leastion of the event's first sub-event
Site website	Merges in all text contained within the Setur Notes area of the event's first sub-event.
Setup Notes	Merges in all text contained within the Setup Notes area of the event's first sub-event, com-
Setup Notes	Morgon in all toxt contained within the Setup Notes area, without any formatting (so it
(Unformatted)	adopts the formatting of the merge document).
Setup Person	Merges in the name of the setup person. This is a customizable quickpick list.
Delivery	Merges in the delivery charge, if applicable.
Charge	
Delivery Cat-	Merges in the delivery category. This is a customizable quickpick list.
egory	
Delivery Per-	Merges in the name of the delivery person. This is a customizable quickpick list.
son	March Hard and Article Delivered Nation (1997) and a second
Delivery Notes	Merges in all text contained within the Delivery Notes area of the event's first sub-event,
Delivery Netes	Complete with non-text for fiduling.
(Unformatted)	adopts the formatting of the merge document).
Comments	Merges in all text on the Comments tab of the event's first sub-event, complete with rich-
	text formatting.
Comments	Merges in all text on the Comments tab of the event's first sub-event, without any formatting
(Unformatted)	(so it adopts the formatting of the merge document).
Planned Guests	Merges in the planned guest count of the event's first sub-event.
Actual Guests	Merges in the actual guest count of the event's first sub-event.
Guaranteed	Merges in the guaranteed guest count of event's first sub-event.
Guests	
Sub-Event Number	Merges in the sub-event number of the event's first sub-event.

Introducing Event Manager

Event Manager is the heart of your Caterease program. Event Manager is where you manage all of your existing events, including editing details and generating prints for existing parties. New events can be added here as well, although most prefer to use the quick, easy Event Wizard tool when booking a new event.

This area of the program offers two different displays: Event display and Sub-Event display.

Event Display

The "Event" display shows the general details of an event, including its theme, reference, sales rep, date, guest count, and more. As with all areas in the program, this screen can be customized, in that fields can be added, removed, or rearranged.

c	Event Manager: Acoustics Associa	ites - E00257 (Filte	red)							-			\times
Þ	Layouts ▼								😭 Go To 🕶 1/30/2018	•		8	₩
Г	Events			- Event Details									4
	Custom: 🎇 Views 🔻 🖓 Filters 🔹	-		Client	Acoustics Associates		٩	Subtotal		9	543.75 q		
*	* Client	Event Date 🔺 📍		Address	1661 Estero Blvd			Serv Chg			\$83.80		
þ	Acoustics Associates	1/30/2018 (Tue)		Telephone	Ft. Myers, FL 33931 (612) 544 8901			Total			\$38.06		19
	Gustave A. Larson Company	1/30/2018 (Tue)		Email	info@acoustics.con			Cost Per Gue	st	-	\$23.31		150
	PSS	1/30/2018 (Tue)											
	Crow Wedding Reception	1/31/2018 (Wed)		🖽 Event 🛛 🖽 Sul	p-Event					Closed -	🔆 Allergy	y	
	Naples Dental Assoc.	2/3/2018 (Sat)											%
	Wiggins, Goodlette & Davis P.A	2/3/2018 (Sat)		General Miscellar	leous								6
	F.G.C.U.	2/5/2018 (Mon)											5
	Salassa/Lau Wedding Reception	2/7/2018 (Wed)		Party Name	Company Lunch		Event #	E00257					-
	Dvorak Reception	2/8/2018 (Thu)		Sales Rep	John Smith	-	Date	1/30/2018	· · · · · · · · · · · · · · · · · · ·	Tuesda	у		
	Sunset Technologies	2/8/2018 (Thu)	4	Theme	Banquet	*	Status	Closed			-		
	Aid Association for Lutherans	2/9/2018 (Fri)		Category	Social	-							
	American Family Insurance	2/9/2018 (Fri)					Planned	25	Booked 11/2//2017		*		
	CAM/USON Company	2/9/2018 (Fri)		Booking Contact	Grover, Rochelle	-	Actual	25	Revised 1/30/2018 (11:31	1 am)			
	Greg's Soccer Team	2/11/2018 (Sun)		Site Contact	Grover, Rochelle	-	Guaranteed	1 22					
	East High School	2/12/2018 (Mon)											
				💉 Notes									
				Each table will ba	ve a white lilar flower arrangement								
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	× ✓ (Event Date is next 14 days)	Customize		100	P								
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	Enter text to search 🔻 Fir	nd Clear		2.1									
	<pre>((<< < 1 of 15) >> >> >> >> >> >> >> >> >> >>> >>> ></pre>												

Sub-Event Display

The "Sub-Event" display shows the specific meal information of an event (the menu, venue — whether offpremise or on-premise — and times). Although this area can be renamed, the concept of "sub-event" is meant to imply that you can break events down into more than one meal - for example, a "Breakfast," a "Lunch," and a "Dinner" - each with its own venue, menu, times, and even date.

G Event Manager: Acoustics Associates - E00257 (Filte	ed)	-		(
▶ Layouts •		😭 Go To 🔹 1/30/2018 🔹 🔡	8- 🗉 🖡	H				
Events	Event Details	\$543.1	75.9	4				
Client Construction Constr	Address 1661 Estero Bird Ft. Myers, FL 33931 Telephone (612) 544-8901 Email info@acoustics.con Eff Event Sub-Event	583.5 538.0 5665.6 est \$23.3	10 26 51 31) 9 2 3 9				
Naples Dental Assoc. 2/3/2018 (Sat) Wiggins, Goodlette & Davis P.A 2/3/2018 (Sat) F.G.C.U. 2/5/2018 (Mon) Salassa/Lau Wedding Reception 2/7/2018 (Wod) Dvorak Reception 2/8/2018 (Thu) Salassa/Lau Wedding Reception 2/8/2018 (Thu) Sunset Technologies 2/8/2018 (Tri) Aird Association for Lutherans 2/9/2018 (Fri) CAM/USON Company 2/9/2018 (Fri) Greg's Soccer Team 2/11/2018 (Sun) East Hind School 2/1/2018 (Mon)	Description Lunch Buffet Date 1/30/2018 (Tue) Start 11:00 AM End 02:00 PM Setup Style Banquet Room Sun	Price Qty Total \$18.95 25 \$473.75 IT \$50.00 1 \$50.00 \$\$ \$20.00 1 \$20.00 \$\$						
East High School 2/12/2018 (Mon) Image: Supreme Buffet Solution Instructions Label Notes Modifications Picture Enter text to search * Find Clear								
₩ ≪ 1 of 15 ► ₩ ₩ * '*	KK ← 1 of 1 → KK ES Food/Service Staffing Comments			3				

Customizing Quickpick Lists

Throughout Caterease the majority of fields offer "quickpick lists" - drop-down lists of choices that you can select from to keep your data entry consistent. These lists are yours to create, and they can be edited as described below.

Note: Editing the list of "Sales Representatives" is done through System Security.

Editing Quickpick Lists

1. Click the Administration ribbon tab at the top of your screen.

2. Click Lists > Quickpicks.

Result: The Setup Quickpick Lists window opens. **Note:** You can also click the **Quickpicks** button in the **Setup** group of the navigation pane (left-hand side of your screen).

😉 Setup Quickpick Lists			\times
*3 *3			• •
✓ · General	^	Meeting	
Reference		Banquet	
Coordinator		Wedding Reception	
- Contact Title		Seminar	
Fax Subject		Retirement	
Cancellation Type		Birthday Party	
Status		Office Party	
Business Type		Wedding Ceremony	
Operation		Wedding Rehearsal	
Account Code			
> Account Manager			
🗸 Event Manager			
Category			
Theme			
Discount Comment			
Additional Cost Cate			
> Sub-Event			
> Menu items			
> Ingredients			
> Required Items			
> Modifiers			
> Vendors			
> Payments			
 Site Locations Site Locations 	~		
			Close

3. On the left-hand side of the Setup Quickpick Lists window, click the expand button to the left of any

quickpick category to see the corresponding lists. Click the **Full Expand** button to view all expanded categories.

The "Room" list, available in the "Event Manager" category above (under "Sub-Event"), is only available if your company has NOT purchased banquet room tracking. This list allows you to create a custom quickpick list for the Room field, but will not track or graph those rooms.

- 4. Click on the desired quickpick list to select it.
- 5. [Optional] Click the Add New Item button 😐 at the top right of the window to add a new item to the list.

Note: In certain lists (Business Type, Status, Event Category), you are able to apply a color to the item, so that you might color-code your Event Scheduler and various detail grids based on these lists. Simply click into the Color column next to each item and click the down arrow to select a new color, or click the browse button (ellipsis button) to set a custom color.

6. [Optional] Click on an item to select it and either edit as desired, or click the Delete Current Item but-

ton 💙 to remove the item from the list.

7. **[Optional]** Hold your left mouse button down on any item in the list and drag it up or down to reposition it.

Note: You cannot drag an item you are currently editing; click off of the item first and then click and hold your left mouse button over it again to drag and drop.

Adding a Sub-Event

 Click the **Sub-Event** button, located next to the **Event** button on the left-hand side of your screen.

Result: The Event Manager changes to the Sub-Event Display.

Click the Add A New Sub-Event button , located on the Sub-Event pane, which is to the left of your Food/Service tab.
 Result: The Sub-Event window opens, with the date and guest counts defaulting from your general event information.

Note:As an alternative, hold your**[Shift]**key down simultaneously while clicking the above button. Doing so prevents a new sub-event window from popping up, and instead you can edit your new sub-event directly in the grid on the left-hand side of your screen.

😉 Sub-Event: I	Breakfast B	uffet								\times
🤛 Layouts 🕶 🥈	🔨 Tools 🕶									8 • @
General Venue	Delivery S	ite								
- Sub-Event Ir Date Description	nformation <mark>5/8/2018</mark> Breakfast B	uffet		* *		Times — Start End	07:30 AM 11:30 AM	÷ S	erving ar	
Туре	On-Premis	e		*	:	Arrival	06:45 AM	*		
Planned Guaranteed	30 27	Actual	30			Departure	12:30 PM	* *		
Buffet ta	ıbles wil	l be s	set up	• the	e p	revious	night.			
✓ Included									<u>O</u> K	<u>C</u> ancel

Included checkbox (bottom left of the Sub-Event window) selected, unless you decide you do not want to include this sub-event and its details (menu, venue, times, etc.), with this event (for example, if it was created as an optional proposal and is not to be included).

Tip: Leave the

3. Click into the <u>Description</u> field and type a description for the sub-event, or select one from your custom quickpick list.

Note:Examples of sub-event descriptions might include "Breakfast," "Break," "Buffet," etc.

4. **[Optional]** Click into the <u>Type</u> field and enter a type for the sub-event, or select one from the custom quickpick list.

Note: This field can be used for tracking your sub-events. Examples might include "Off-Premise," "On-Premise," "Delivery," etc.

- 5. Enter times by hand, using the formats below, or by using the Time Wizard tool:
 - As a normal number for AM hours that is, type "9" for 9:00 AM, "11" for 11:00 AM, etc.
 - As a four-digit number for any other times that is, type "0930" for 9:30 AM or "0930" and a "P" for 9:30 PM.
 - Click into the hours, minutes, or AM/PM area of the time field and use the up-and-down arrows at the right of the field to make changes.
- 6. **[Optional]** Enter banquet room details or off-premise information, depending on the venue of the party.
- 7. Optionally rearrange multiple sub-events by clicking on a sub-event, then dragging and dropping into the desired position.

vents		Event Details -											
ustom: 🎇 Views 🔻 🍸 Filters 🛪	-	Client	Greg's S	occer Tei	am ane NW/		٩	Subtotal Serv Chr			\$1,	471.0	00 Q
Client	Event Date	Address	Naples.	FL 34102	and new			Tax			s	102.9	97
Dvorak Reception	3/1/2018 (Thu)	Telephone	(507) 253	3-1869				Total			S1,	809.3	33
East High School	3/5/2018 (Mon)	Email						Cost Per Guest				\$32.9	97
Everblades Hockey	11/7/2017 (Tue)												
FGCU	2/26/2018 (Mon)	🖽 Event 🔤	Sub-Event										
Glessing Wedding	1/25/2018 (Thu)											_	
GME Consultants	1/7/2018 (Sun)	Description	Dinner Buffet	•	* Item Name				Price	Qty	Total		4
Goetz/Lyons Wedding Reception	2/15/2018 (Thu)	Date	4/11/2018 (Wed)		▶ Coffee				\$18.00	1	\$18.00	₽	•
Greg's Soccer Team	2/7/2018 (Wed)	Start	04:30 PM	0	Hot Choco	late			\$21.00	1	\$21.00	₽	¥.
Greg's Soccer Team	1/10/2018 (Wed)	End	08:00 PM		Soft Drinks	and Mineral Water			\$1.25	20	\$25.00	₽	•
Greg's Soccer Team	1/3/2018 (Wed)	Setup Style	Rounds		Muffins				\$18.00	1	\$18.00	14	= •
Greg's Soccer Team	3/4/2018 (Sun)	Room	Sea	ER.	Bagels				\$15.00	1	\$15.00	14	
Greg's Soccer Team	3/18/2018 (Sun)												
Greg's Soccer Team	4/11/2018 (Wed)	Description	After Dinner	iQ.									_
Greg's Soccer Team	3/13/2018 (Tue)	Date	4/11/2018 (Wed)										#
Gustave A. Larson Company	2/17/2018 (Sat)	Start	08-30 PM	ref									
Gustave A. Larson Company	2/20/2018 (Tue)	End	10:00 PM	+ +									
Horizon Business Services	1/18/2018 (Thu)	Setup Style	Reception										
Horizon Business Services	6/16/2018 (Sat)	Room	Sea										
Horizon Business Services	1/17/2018 (Wed)				Description	Coffee per gallon							
Ladtech	5/8/2018 (Tue)	Description	Mid Morning		Instructions								
Ladtech	12/30/2017 (Sat)		Break 48		instructions								
Ladtech	11/18/2017 (Sat)	Date	4/11/2018 (Wed)		Label								
Ladtech	3/7/2018 (Wed)	Start	10:30 AM		Notes								
Ladtech	3/11/2018 (Sun)	End	11:30 AM		Madification								1
Ladtech	3/20/2018 (Tue)	Setup Style	Rounds		woulfication	5							£
Enter text to cearch	nd Clear	Koom	269		Picture								†⊞

Adding a Payment

Adding a Payment for an Event

- 1. In Event Manager, retrieve the event for which you want to add a payment.
- Click the **Payments Made** button located in the toolbar on the upper right-hand side of the Event Manager, or from the **Tools** menu at the top of your screen, depending on your personal configuration. *Result: The Event Payments window opens.*

B Event Payments: Acoustics Associates (E00463)		×
Print -		₩• 🗉 🐯•
	Total Paid Balance	\$9,476.21 \$0.00 \$9,476.21
* Paid Amount Comment	Pay Method	•
<no data="" display="" to=""></no>		

Click the Add Payment button
 , located on the right-hand side of the Event Payments window.
 Result: The Payment Details window opens.
 Note: The current date defaults as the new payment date, but can easily be edited.

- 38 -

😉 Payment I	Details			×
		1	Credit Card	Information
General	General —			
Credit Card	Date	3/1/2018		Ŧ
	Amount	\$2,000.00		
	Pay Method	Credit Card		-
	Category	Inital Deposit		-
	Comment			*
	Miscellaneo	us		
	Rev Code			
	Acct Code			-
	Check #			
	Check Date			-
			OK	Canad
			OK	<u>C</u> ancel

- 4. Enter a dollar amount into the <u>Amount</u> field. **Note:** Type a dollar amount into the field or click the down arrow to access the drop-down calculator.
- Select a <u>Pay Method</u> from the drop-down quickpick list, or accept the default. (You may also type directly into the field.)
 Note: This information will default from the Payment Method of the event (if one exists).
- 6. Optionally enter a <u>Category</u> or choose a category from the drop-down quickpick list. **Note:** Examples of categories might include "Initial Deposit," "Final Payment," etc.
- 7. Enter a <u>Comment</u>, if desired.
- 8. [Optional] Enter credit card details, if posting a credit card payment
- [Optional] Enter additional information, including a <u>Revenue Code</u> or <u>Account Code</u> for the payment, as well as <u>Check #</u> and <u>Check Date</u>. *Note:* None of this is required information.
- 10. Click **OK**.

Result: The Payment Details window closes, and your new payment is listed in the Event Payments window.

😉 Event Payment	s: Acoustics Asso	ciates (E00463)		×
Print •				8• 🗉 🔍 •
			Total Paid Balance	\$9,476.21 \$2,000.00 \$7,476.21
* Paid	Amount	Comment	Pay Method	•
▶ 3/1/2018	\$2,000.00	Initial Deposit	Credit Card	•
₩	* * * * *			

11. Click the X, located at the upper right-hand side of the window, to close the Event Payments window.

Editing an Existing Event Payment

Click the **Payments Made** button
 , located in the toolbar on the upper right-hand side of the Event Manager, or from the **Tools** button at the top of your screen, depending on your personal configuration.

Result: The Event Payments window opens.

Print * Total \$9,476.21 Paid \$2,000.00 Balance \$7,476.21 * Paid Amount Comment Pay Method • * 3/1/2018 \$2,000.00 Initial Deposit Credit Card •	B Event Payments: Acoustics Associates (E00463)		×
Total \$9,476.21 Paid \$2,000.00 Balance \$7,476.21	Print ▼		#• 🔳 🔍 •
* Paid Amount Comment Pay Method > 3/1/2018 \$2,000.00 Initial Deposit Credit Card Image: Comment initial Deposit Image: Comment initial Deposit Image: Comment initial Deposit		Total Paid Balance	\$9,476.21 \$2,000.00 \$7,476.21
3/1/2018 \$2,000.00 Initial Deposit Image: state of the state of th	* Paid Amount Comment	Pay Method	•
	▶ 3/1/2018 \$2,000.00 Initial Deposit	Credit Card	•
	K4 «< 4 1 of 1 >>> >> + '*		

- 2. Select any payment listed in the Event Payments window.
- 3. Click the **View/Edit Payment Details** button , located on the right-hand side of the window. *Result:* The Payment Details window for that payment opens.
- 4. Edit information as desired and click **OK**. *Result:* You are returned to the Event Payments window.
- 5. Click the X, located at the upper right-hand side of the window, to close the window.



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