## E-mail a Print

1. Click the **Email** button, located on the upper left-hand side of the print preview.
   Note: The print will be attached as a .PDF.
2. Type an e-mail subject into the <u>Subject</u> field.
3. Type the e-mail body or select a custom merge letter.
4. Attach additional prints/files as desired.
5. Click the **Send** button.

Using the Miscellaneous Print Designer

1. Click the **Miscellaneous Print Designer** button, located on the **Setup** sidebar.
2. Click the **New Print** button, located at the top left-hand side of the window.
3. Click into the **Add A New Print** checkbox.
4. Click on the title of the print you would like to work with.
5. Click **OK**.
6. Type a title for your print, and then press **[Enter].**
7. Click the **Edit Header** button (top right-hand side of the screen).
8. Type the desired Header, and then click **Close**.
9. Click the down arrow to the right of a field if you would like to select an alternate option.
10. Click into the checkboxes located on the far right-hand side of the print to prevent certain sections from appearing on the print.
11. Click the **Preview** button, located at the top of the screen.
    Note: You must have an event open in Event Manager in order to preview your print.
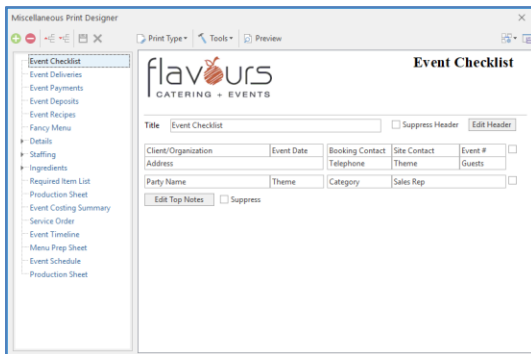
See Miscellaneous Prints Designer

This section applies to the Event Sub-prints section of the Prints menu in Event Manager.

Copy an Existing Print

1. In Print Designer or Miscellaneous Print Designer, click on the title of the print you want to copy.
   Note: Available only in the Professional version.
2. Right-click and choose **Copy Print.**
3. Click **Yes** at the confirmation message.
4. Type a name for the new copy, and press **[Enter].**

See Copying an Existing Print

Additional Resources

Editing Miscellaneous Prints
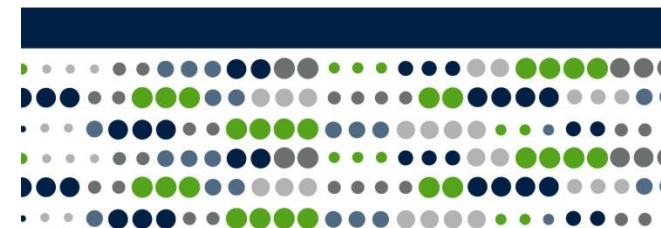Customizing Financial Information
Sending Email from Event Manager

Quick Reference Guide:

Print Designer

800.863.1616
www.caterease.com

Add a New Print

1. Click the **Print Designer** button from the **Setup** sidebar.
2. Click the **Add Print** button ⊕, located at the top left-hand side of the Print Designer window.
3. Click **Yes** at the confirmation message.
4. Click on the desired design Layout, and then click **OK**.
5. Type a title over the words "New Print," and then press **[Enter].**
6. Click the down arrow to the right of the Print Type field, located at the bottom right-hand side of the screen.
7. Select the desired Print Type: Contact, Invoice, BEO, None.

See Adding a New Event Print in Print Designer


Customize the Header/Footer

1. From your Print Designer, click the **Edit Header** button (top right-hand side of the screen) or the **Edit Footer** button (lower left-hand side of the screen).
2. Click into one of the panels on the Header window, then click the **Insert** button, located at the top of the window, to browse to a logo or image.
3. Click the **Fields** button, located to the left of the **Insert** button, to add merge fields.
4. **[Optional]** Add a link to your company website by typing into the Hyperlink field.
5. When finished, click **Close**.
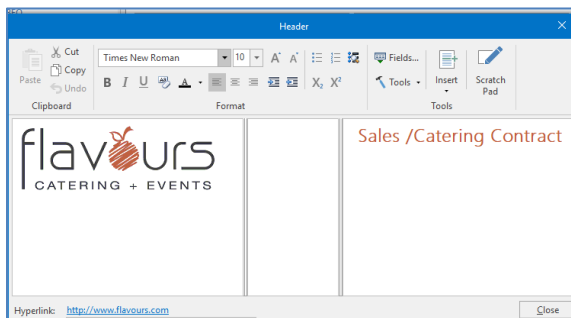
See Customizing Event Prints in Print Designer

Customize and Suppress General Information

1. From your Print Designer, click the down arrow to the right of a field to select an alternate option.
2. Click into the checkboxes located on the far right-hand side of the print to keep certain sections from appearing on the print. For example, you might opt to suppress financial information if your print is meant for your chef; similarly, you might suppress ingredients for prints you send to your customers.
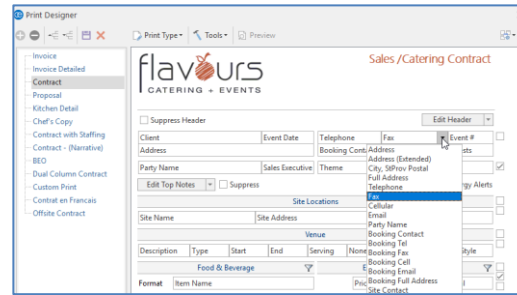

💡 *Using your mouse, hover over the checkboxes to view the tooltips.*
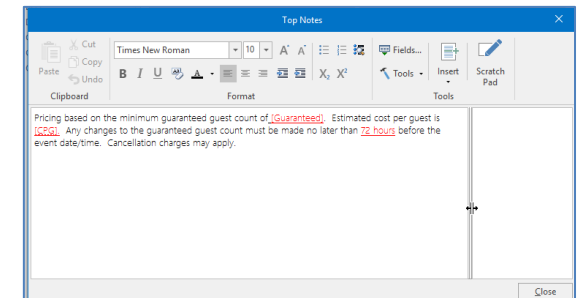
See Customizing Event Prints in Print Designer

Customize the Menu Section

1. From your Print Designer, click the down arrow to the right of the Format field, located towards the middle of the window.
2. Click into the boxes of the features you would like to display on your print. For example, click into the Picture checkbox if you would like to display any images you have uploaded.
3. Click the **Filter** button 🔽 to filter food/beverage and equipment/miscellaneous items, depending on print layout.
4. Select desired Type, Category, and Prep Area options by clicking the down arrow to the right of each field.
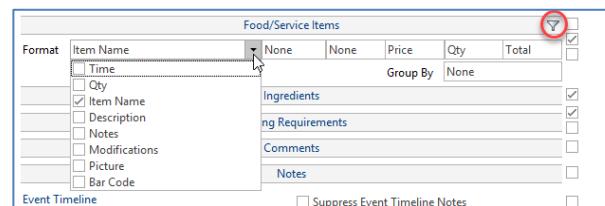
Customize Top Notes and Bottom Notes

1. From your Print Designer, click the **Edit Top Notes** button (upper left-hand side of the screen) or **Edit Bottom Notes** button (lower left-hand side of the screen).
2. Click into the desired panel, and then click the **Insert** button, located at the top of the window, to browse to a logo or image.
3. Click the **Fields** button, located to the left of the **Insert** button, to add merge fields.
4. Format the font as desired, by using the **Format** toolbar on the upper left-hand side of the window.
5. When finished, click **Close.**

See Customizing Event Prints in Print Designer

Preview and Print

1. Click the **Preview** button, located at the top of the Print Designer screen.
   Note: You must have an event open in Event Manager in order to preview your print.
2. Click the **Print** button, located at the upper left-hand side of the print.