

Training Guide

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Caterease Introduction

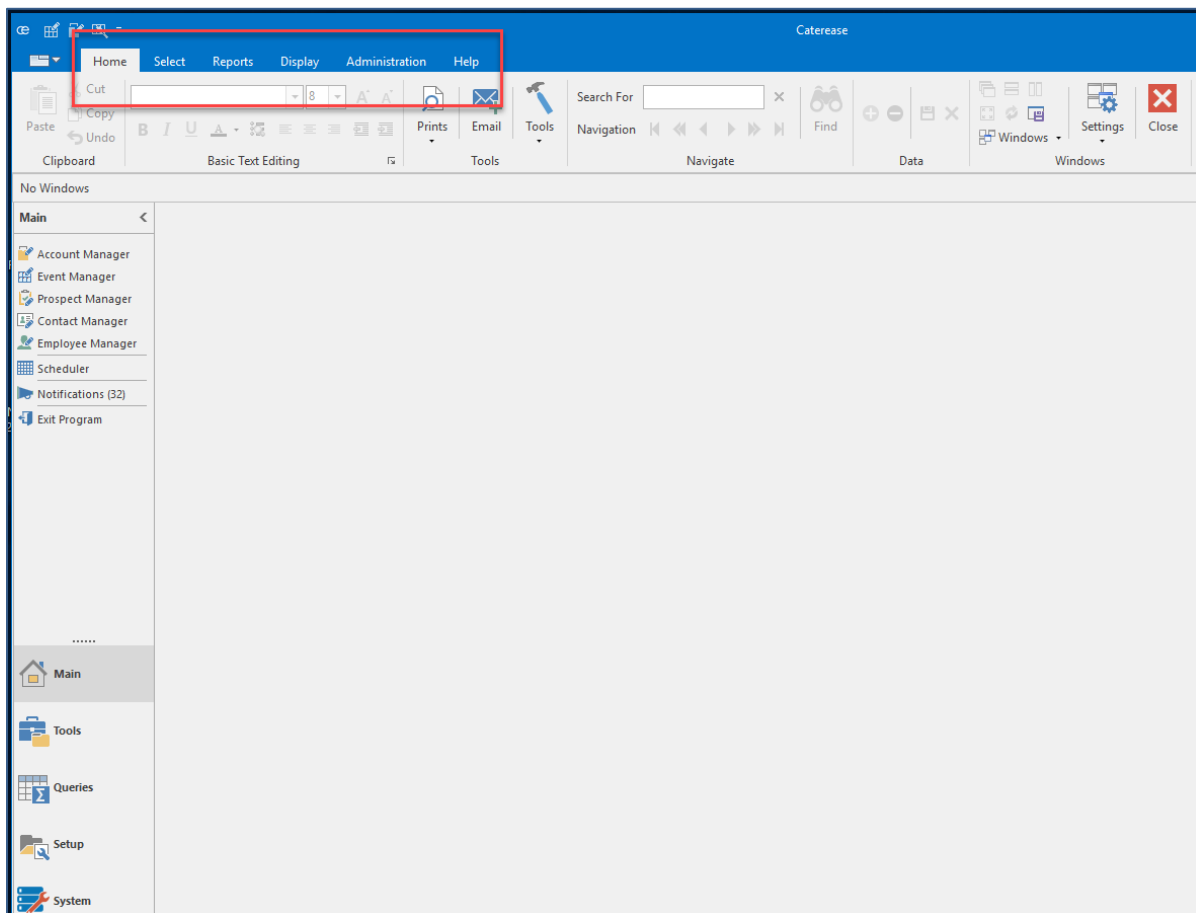
Ribbon Tabs

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

- **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 quick-access reports to track various information.
- **Display Ribbon Tab:** Allows you to make certain changes to your Display, such as switching program skins.
- **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.



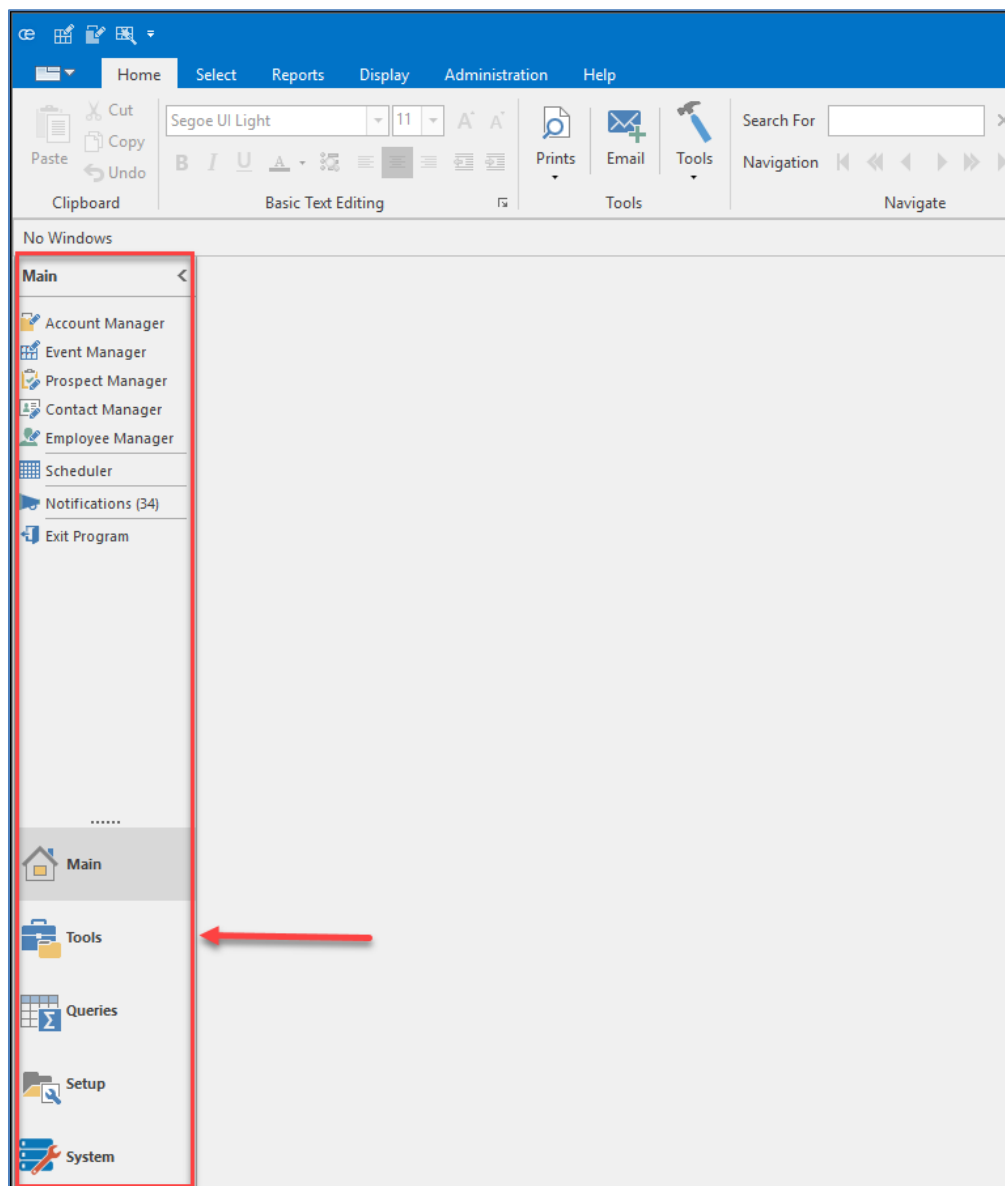
Caterease is designed to look and act like programs you use every day. In addition to common Windows standards, such as right-click pop-up menus, drag-and-drop features (and many other tools), Caterease uses familiar Ribbon Tabs and a Navigation Pane to keep your learning curve small so you can get up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





Navigation Pane (Sidebar)



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

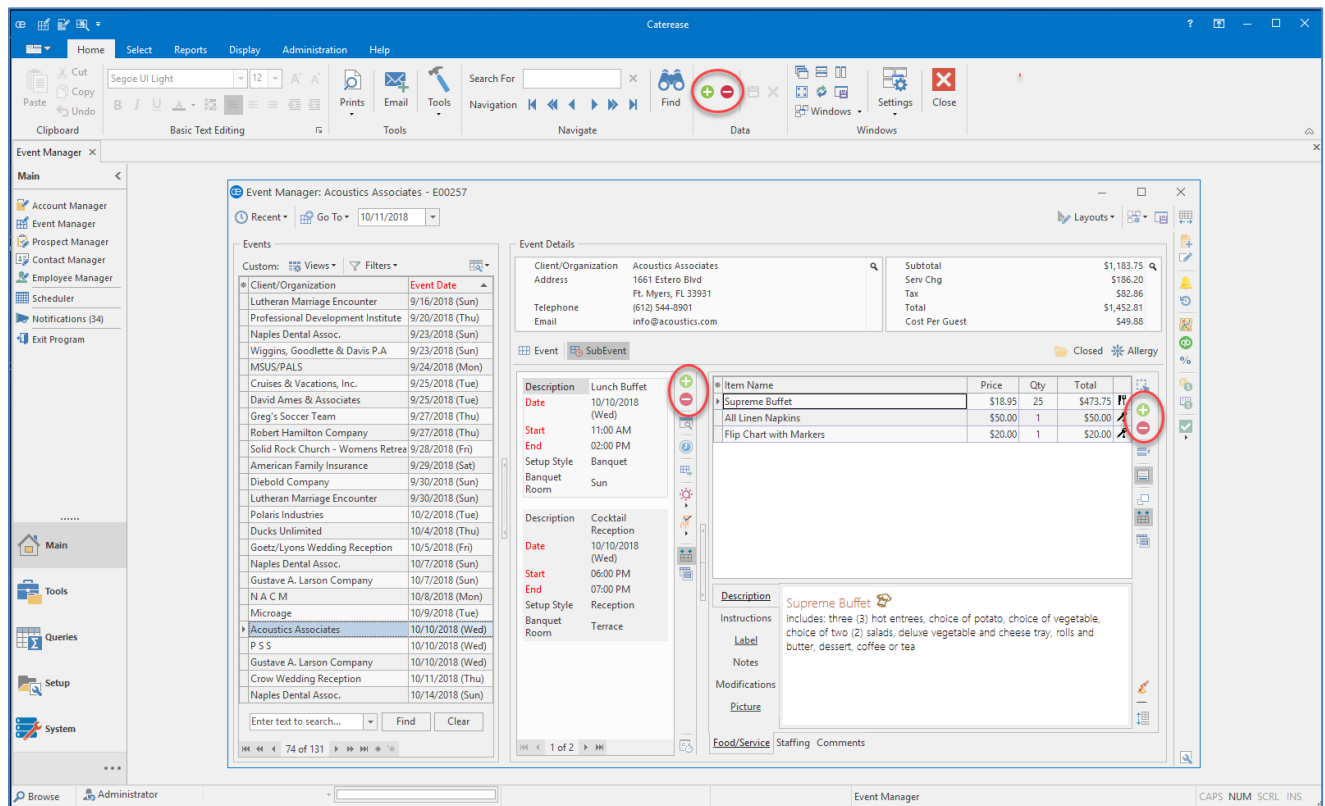
- **Main Sidebar:** Offers access to the program's Managers (Account Manager, Event Manager, etc.).
- **Tools Sidebar:** Offers the popular Event Wizard and other handy tools.
- **Queries Sidebar:** Allows you to build custom queries to track any information you would like to see.
- **Setup Sidebar:** Offers access to various setup features in the program.
- **System Sidebar:** Allows you archive events, manage deleted events, and more.




Frequently Used Buttons

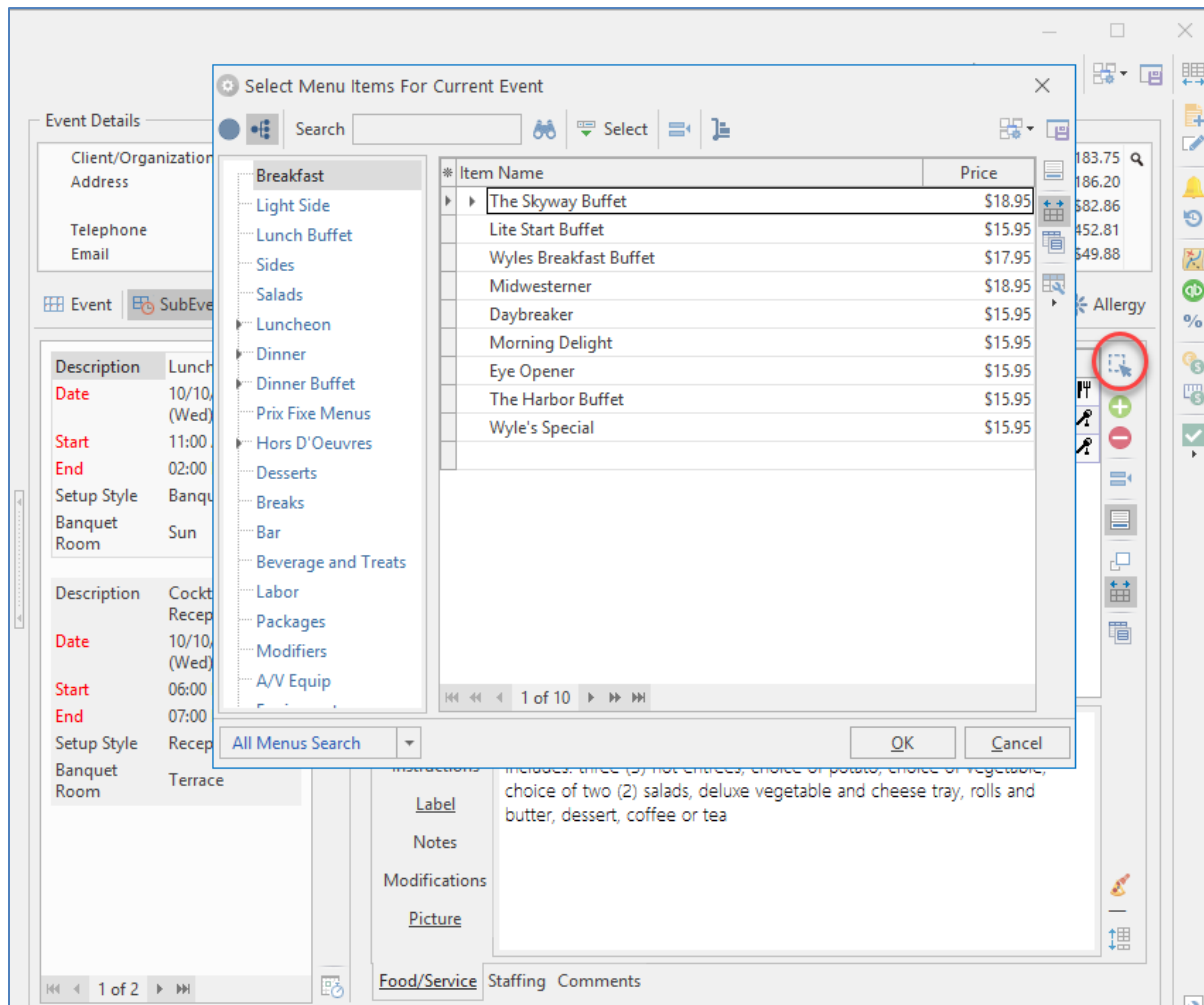
Adding Records: Anytime you want to add anything new in the program, you will click a green plus sign button . Located in numerous places throughout the program, the **Add Record** button  lets you add events, clients, custom menu items, and more.

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, clients, menu items, and more.




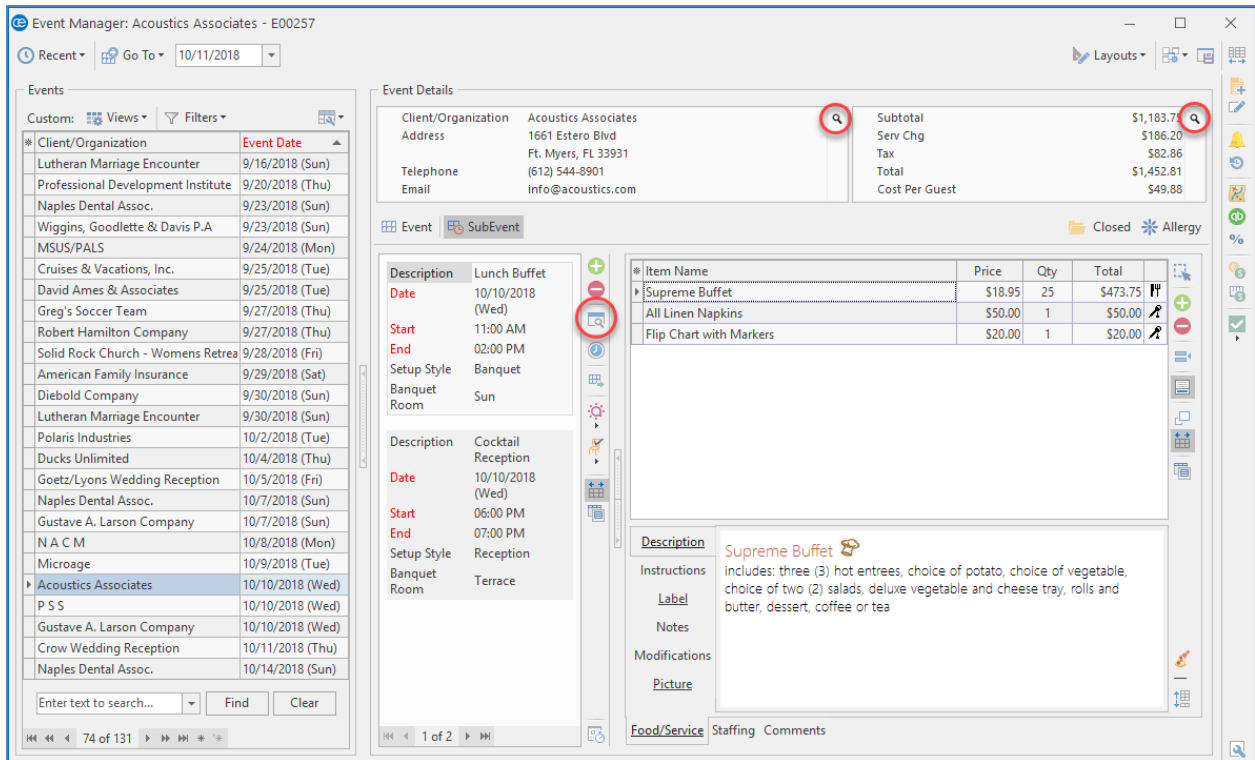
With CaterEase, your learning curve is small, thanks to the consistent use of buttons throughout the program. The two most common actions (adding and deleting records), can be done quickly, with two prominent buttons.

Selection Tool: Click the **Select** button , located throughout the program, to select menu items, employees, site locations, etc., from default lists.



tip 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 and timelines, etc., and then select from those lists using the Select button.

Show Details Button (Magnifying Glass): Click the **Show Details** button  anywhere in the program to view additional/extended details of a record in a separate pop-up window.



The screenshot shows the 'Event Manager: Acoustics Associates - E00257' window. On the left, a list of events is displayed with columns for Client/Organization and Event Date. 'Acoustics Associates' is selected for 10/10/2018 (Wed). The main area shows 'Event Details' for this entry, including contact information and a summary table. A magnifying glass icon is circled in the top right of the summary table. Below the details, a table lists items for the event, including 'Supreme Buffet', 'All Linen Napkins', and 'Flip Chart with Markers'. Another magnifying glass icon is circled next to the 'Supreme Buffet' item. A detailed description of the 'Supreme Buffet' is shown in a pop-up window at the bottom right.

Item	Price	Qty	Total
Supreme Buffet	\$18.95	25	\$473.75
All Linen Napkins	\$50.00	1	\$50.00
Flip Chart with Markers	\$20.00	1	\$20.00

Includes:	three (3) hot entrees, choice of potato, choice of vegetable, choice of two (2) salads, deluxe vegetable and cheese tray, rolls and butter, dessert, coffee or tea
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Another button consistently used throughout the program is the magnifying class button, or the Show Details button, which allows you to view additional details of different records, such as sub-events, contact people, etc.

Event Manager: Using the Event Display

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

The screenshot displays the 'Event Manager: Acoustics Associates - E00257 (Filtered)' window. The interface is divided into several sections:

- Events List:** A table on the left showing a list of events with columns for 'Client/Organization' and 'Event Date'. The selected event is 'Acoustics Associates' on '10/10/2018 (Wed)'. Other events include 'P S S', 'Gustave A. Larson Company', 'Crow Wedding Reception', 'Naples Dental Assoc.', 'Wiggins, Goodlette & Davis P.A', 'FGCU', 'Salassa/Lau Wedding Reception', 'Sunset Technologies', 'Dvorak Reception', 'American Family Insurance', 'CAM/USON Company', 'Aid Association for Lutherans', 'Greg's Soccer Team', and 'East High School'.
- Event Details:** A section on the right providing information about the selected event.
 - Client/Organization:** Acoustics Associates, 1661 Estero Blvd, Ft. Myers, FL 33931, Telephone (612) 544-8901, Email info@acoustics.com.
 - Financials:** Subtotal \$1,183.75, Serv Chg \$186.20, Tax \$82.86, Total \$1,452.81, Cost Per Guest \$49.88.
 - General/Miscellaneous:** Party Name 'Company Lunch', Sales Rep 'Kathy Wilson', Theme 'Banquet', Category 'Social', Event # 'E00257', Date '10/10/2018' (Wednesday), Status 'Closed', Planned 25, Booked 8/7/2018, Actual 25, Revised 10/26/2018 (03:08 pm), Guaranteed 22.
 - Notes:** A text area containing the note 'Each table will have a white lilac flower arrangement.' and an image of a white lilac flower arrangement in a vase.



Event Manager is where you will manage 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.

Event Manager: Using the Sub-Event Display

The Sub-Event display in Event Manager shows the specific meal information of an event (the menu, venue — whether off-premise 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.

The screenshot displays the Event Manager software interface for Acoustics Associates (E00257). The interface is divided into several sections:

- Events List:** A table showing a list of events with columns for Client/Organization and Event Date. The first event, Acoustics Associates, is selected.
- Event Details:** A section showing client information for Acoustics Associates, including address (1661 Estero Blvd, Ft. Myers, FL 33931), telephone ((612) 544-8901), and email (info@acoustics.com). It also displays a summary of costs: Subtotal (\$1,183.75), Serv Chg (\$186.20), Tax (\$82.86), Total (\$1,452.81), and Cost Per Guest (\$49.88).
- Sub-Event Display:** A section showing the details of the selected sub-event, "Lunch Buffet". It includes the date (10/10/2018, Wed), start time (11:00 AM), end time (02:00 PM), setup style (Banquet), and room (Sun). Below this, a table lists the items included in the buffet:

Item Name	Price	Qty	Total
Supreme Buffet	\$18.95	25	\$473.75
All Linen Napkins	\$50.00	1	\$50.00
Flip Chart with Markers	\$20.00	1	\$20.00

Below the table, the "Supreme Buffet" is described as including three (3) hot entrees, choice of potato, choice of vegetable, choice of two (2) salads, deluxe vegetable and cheese tray, rolls and butter, dessert, coffee or tea.

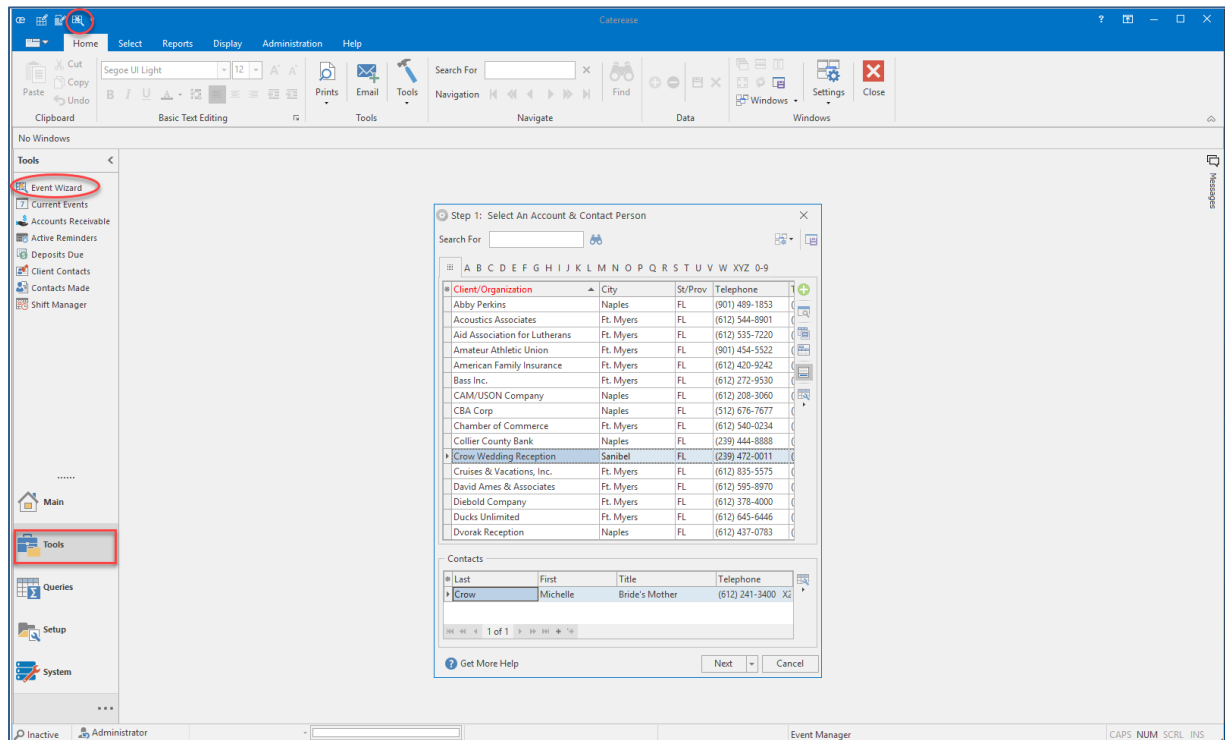
The interface also includes a search bar at the bottom left, a "Find" button, and a "Clear" button. The bottom status bar shows "1 of 15" items.

Using the Event Wizard

Accessing the Event Wizard


1. Click the **Event Wizard** button, located from the **Tools** sidebar or from the Quick Access Toolbar at the top left-hand side of your screen.

Note: The Event Wizard can be accessed from many areas within Caterease.




(See [Event Wizard Step 1](#))

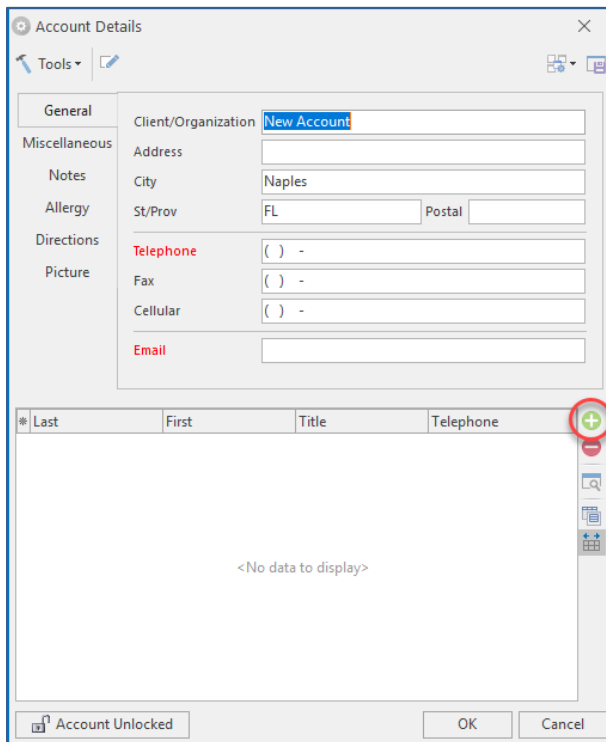
Adding a New Account/Contact Person

1. Click the **Add New Account** button , located at the top of the Event Wizard (Step 1) window.
2. Click **Yes** at the confirmation prompt.
3. Fill in the Client/Company details by typing directly into the fields provided on the Account Details window. (Press **[Tab]** or **[Enter]** to move from field to field.)

Note: Any fields with red font indicate required fields.

4. Click **Ok**.

Note: If you are adding information for an individual, skip step 3. Instead, click the **Add a New Contact** button  on the Account Details window, and then click **Copy to Client** on the Contact: Un-Assigned window **after** you have filled in the individual's contact information.



Account Details

Tools

General

Client/Organization **New Account**

Miscellaneous

Address

City Naples

St/Prov FL Postal

Notes

Allergy

Directions

Telephone () -

Fax () -

Cellular () -

Picture

Email

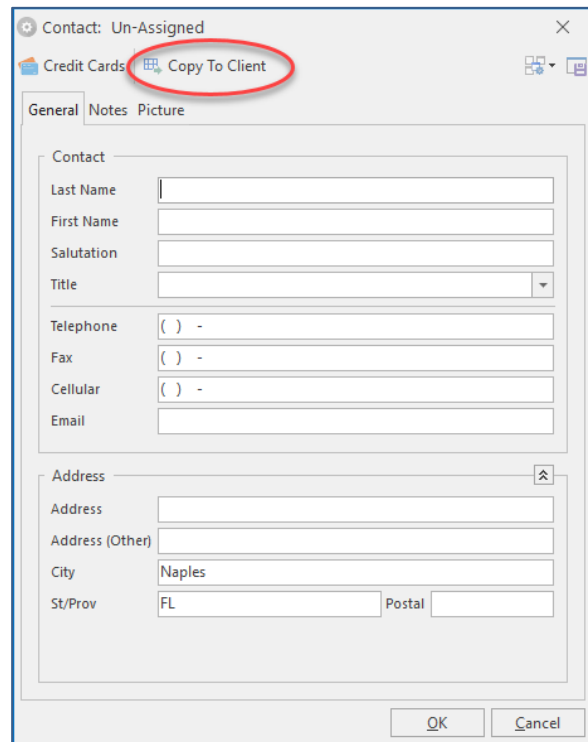
* Last First Title Telephone

<No data to display>

Account Unlocked OK Cancel

(See [Event Wizard Step 1.](#))

(See [Making Fields Required.](#))



Contact: Un-Assigned

Credit Cards Copy To Client

General Notes Picture

Contact

Last Name

First Name

Salutation

Title

Telephone () -

Fax () -

Cellular () -

Email

Address

Address

Address (Other)

City Naples

St/Prov FL Postal

OK Cancel

Choosing a Wizard Layout

From Step 1 of the Event Wizard, click the **Next** button or choose from a custom Event Wizard by clicking the down arrow to the right of the **Next** button.

Step 1: Select An Account & Contact Person

Search For

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9

* Client/Organization	City	St/Prov	Telephone
Abby Perkins	Naples	FL	(901) 489-1853
Acoustics Associates	Ft. Myers	FL	(612) 544-8901
Aid Association for Lutherans	Ft. Myers	FL	(612) 535-7220
Amateur Athletic Union	Ft. Myers	FL	(901) 454-5522
American Family Insurance	Ft. Myers	FL	(612) 420-9242
Bass Inc.	Ft. Myers	FL	(612) 272-9530
CAM/USON Company	Naples	FL	(612) 208-3060
CBA Corp	Naples	FL	(512) 676-7677
Chamber of Commerce	Ft. Myers	FL	(612) 540-0234
Collier County Bank	Naples	FL	(239) 444-8888
► Crow Wedding Reception	Sanibel	FL	(239) 472-0011
Cruises & Vacations, Inc.	Ft. Myers	FL	(612) 835-5575
David Ames & Associates	Ft. Myers	FL	(612) 595-8970
Diebold Company	Ft. Myers	FL	(612) 378-4000
Ducks Unlimited	Ft. Myers	FL	(612) 645-6446
Dvorak Reception	Naples	FL	(612) 437-0783

Contacts

* Last	First	Title	Telephone
► Crow	Michelle	Bride's Mother	(612) 241-3400 X2

1 of 1

Get More Help

Next


- On Premise
- Delivery
- On/Off Premise
- Tabbed Layout

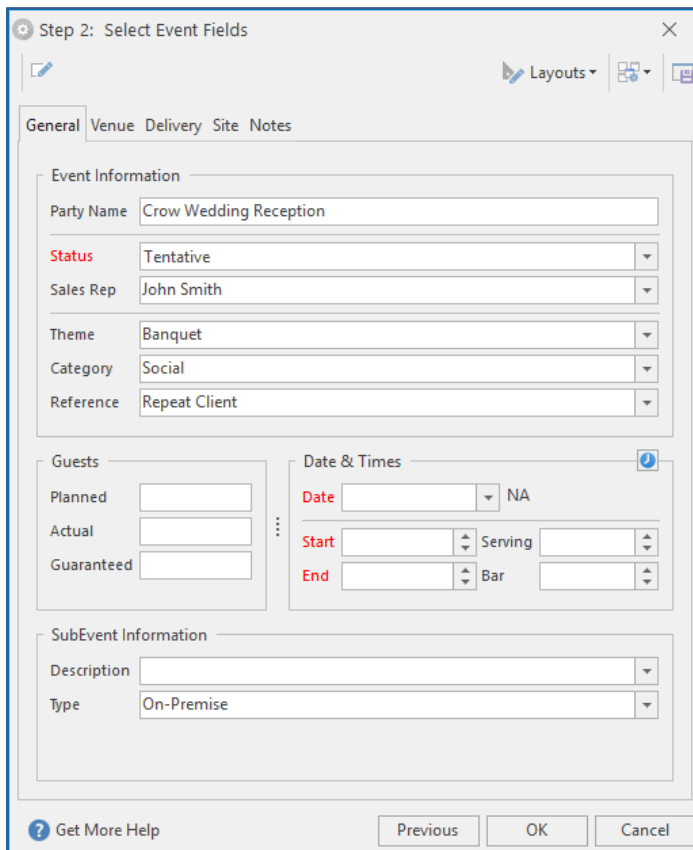
(See [Event Wizard Step 1.](#))

Completing the Informational Fields

Filling out General Details

1. Enter details into simple text fields, such as the Party Name field, by simply typing into the field. (*Press **[Tab]** or **[Enter]** to move from field to field.*)
2. Click the down arrow to the right of various fields to access a list of quickpicks.
3. Complete the guest count fields (Planned, Actual, Guaranteed) by typing directly into the fields.
4. Enter an event date by typing into the Date field or by accessing the drop-down calendar.
5. Enter times for the new event by typing directly into the fields or by clicking the **Time Wizard**

button  and dragging and dropping times into position.



(See [Event Wizard Step 1.](#))

(See [Customizing Quickpicks](#))

Filling out Room Details

1. Fill out guest, date, and time information as described in the previous step.
2. Click the down arrow to the right of the Setup Style field, then select a setup style from the corresponding quickpick list.
3. Click the down arrow to the right of the Room field and select a room from the list.
4. **[Optional]** Click into the Room Charge field and enter a room charge (or accept the default).
5. **[Optional]** Click into the Setup or Tear Down fields and enter the amount of time needed to set up or tear down the room.

Step 2: Select Event Fields

Layouts

Event Information

Party Name: Sunset Technologies

Sales Rep: John Smith Reference: Mailing

Status: Tentative Business Type: On-Premise

Theme: Bar Category: Social

Sub-Event Information

Room	Capacity
Ocean	210
Sand	70
Sun	70
Sea	75
Sand-Sun	140
Sun-Sea	140
Meeting	NA
Sunset Rooms	
Terrace	70
Royal Palm	180
Sea Oats	180

Guests

Planned: 0 Actual: 0 Guaranteed: 0

Description:

Setup Style: Meeting

Room: Sunset Rooms

Room Chg:

Serving: 01:00 PM Bar: 12:30 PM


Setup: 01:00 Tear Down: 00:30

Wednesday



Get More Help Previous OK Cancel


(See [Event Wizard Step 2.](#))

Using the Room Selection Wizard

1. Fill out guest, date, time, and setup style information as described above.
2. Click the **Room Selection Wizard** button (ellipsis) at the right of the Room field.
3. **[Optional]** Click the **View Conflicts** button  to review specific room conflicts.
4. Select another room if you do not want to accept the recommended room.
5. Click **OK** at the bottom of the Select Room window to accept the selected room.

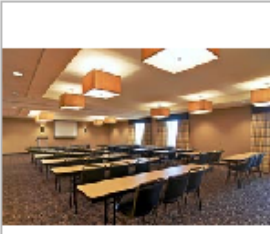
Select Room For Wednesday, February 7, 2018 (11:00 am - 04:30 pm)

View  

* 	Room	View Conflicts	Room Category	Max	Var
Location : Ballrooms					
	Meeting	Meeting	NA	NA	
	- Setup Style Does Not Apply To Room.				
	Ocean	Ballroom	210	110	
	Sand	Ballroom	70	-30	
	- Capacity Overload ... The Sand room has a maximum capacity of 70 for a Banquet setup style.				
	Sand-Sun	Ballroom	140	40	
	Sea	Ballroom	75	-25	
	- Capacity Overload ... The Sea room has a maximum capacity of 75 for a Banquet setup style.				
	Sun	Ballroom	70	-30	
	- Capacity Overload ... The Sun room has a maximum capacity of 70 for a Banquet setup style.				
	Sun-Sea	Ballroom	140	40	
Location : Sunset Rooms					
	Royal Palm	Meeting	180	80	
	- Booked ... # E00184, Royal Palm room, from 11:00 am to 11:00 pm				
	Sea Oats	Meeting	180	80	

Notes

Projector and screen available in room.



100 (PIn)

OK Cancel


(See [Event Wizard Step 2.](#))



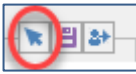
tip CaterEase automatically tracks room availability based on date, time, and guest count. Therefore, that information should be entered prior to selecting a room. (Available with the Banquet Rooms add-in module. If you do not own the Banquet Rooms add-in module, you can add your rooms to quickpick lists, although you will not be notified of any room or capacity conflict.)

Filling out Off-Premise Site Location Details

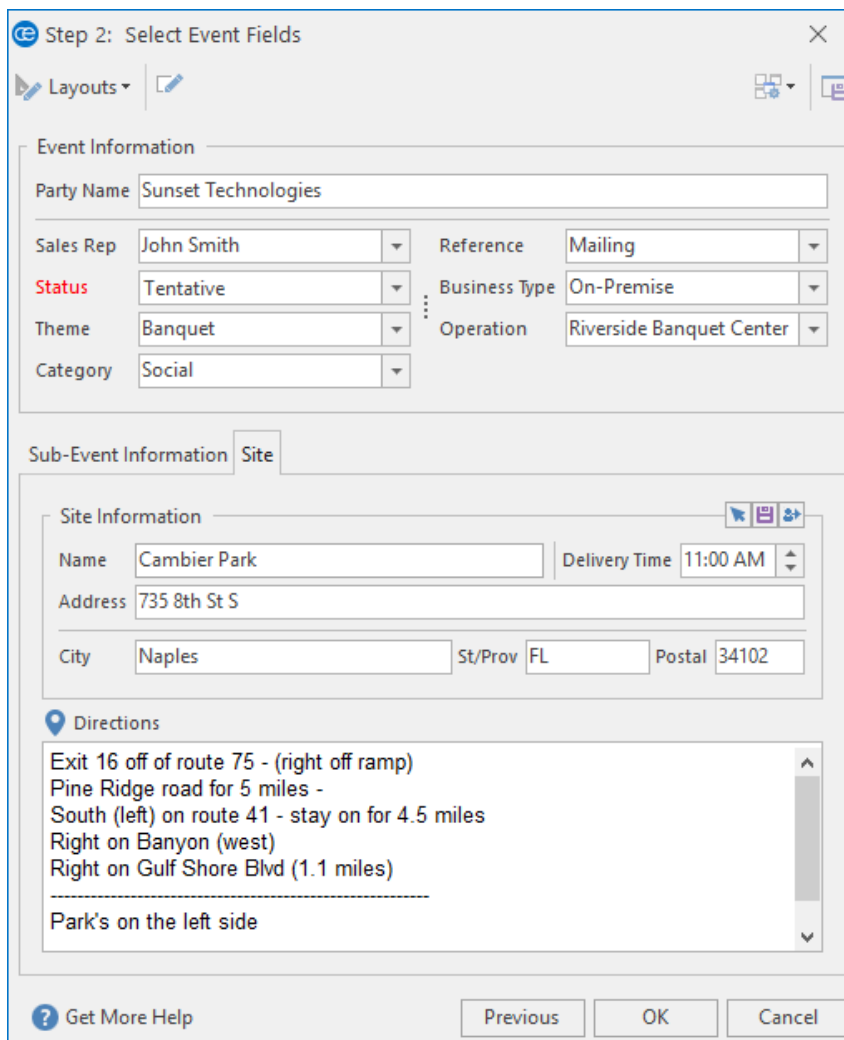
1. In Step 2 of the Event Wizard, click the **Site** tab.
2. Click into the (Site) Name field and type a location as desired. Click the **Save Site**

Locations button  to add the new site to your site locations database.

*Note: You can also select commonly used site locations by clicking the **Select Site***

Location button , or you can add the client's address as the site location by

clicking the **Copy from Client** button .



Step 2: Select Event Fields

Layouts ▾

Event Information

Party Name

Sales Rep Reference

Status Business Type

Theme Operation

Category

Sub-Event Information Site

Site Information

Name Delivery Time

Address

City St/Prov Postal

Directions

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 on the left side

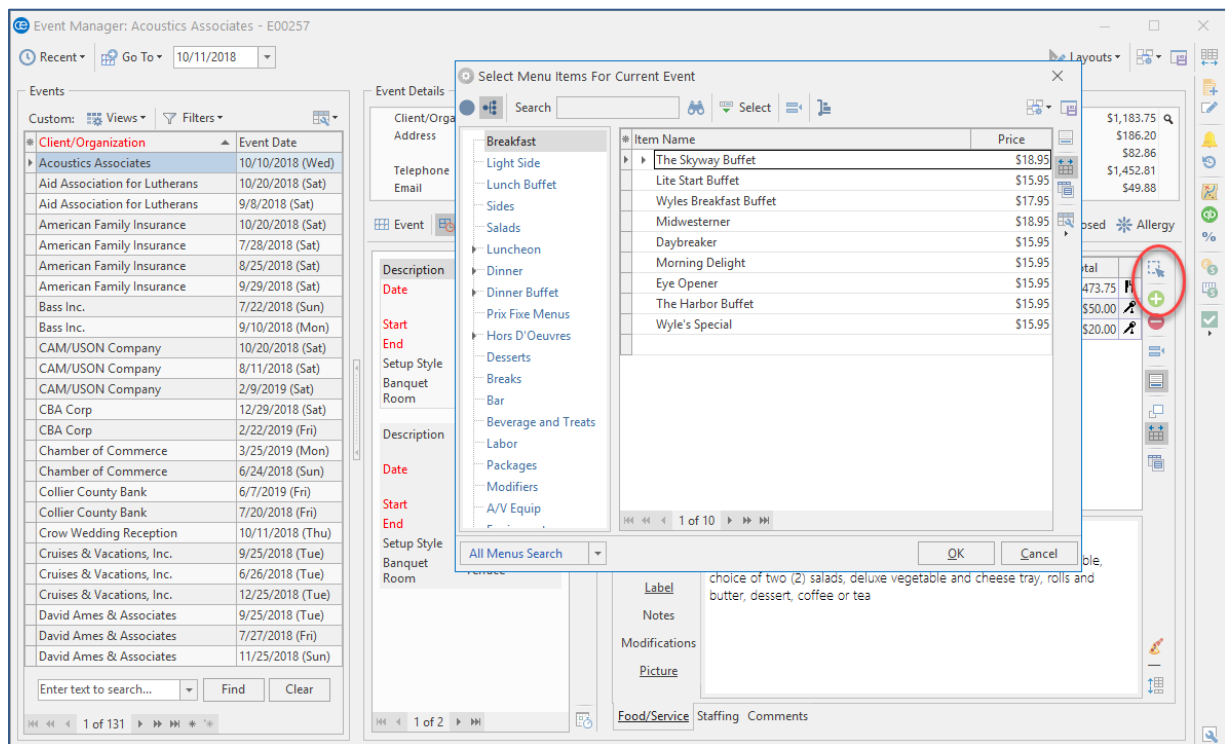
Get More Help Previous OK Cancel

(See [Event Wizard Step 2.](#))

Entering Food/Service Item Details

Retrieving Food/Service Items from Default Menus


1. From the menu selection window, click a menu title and select the items you would like to add.
2. **[Optional]** Add a custom menu item to an event by clicking the **Add A New Food/Service Item** button , located on the right-hand side of the **Food/Service** window.
3. Enter the name, price, and quantity of the new menu item. (See the next topic for details.)





(See [Event Wizard Step 3.](#))








(See [Food/Service Item Types.](#))

Adding a Custom Food/Service Item to an Event

1. Confirm the **Food/Service** tab is currently selected at the bottom of your Sub-Event display in Event Manager.
2. Click the **Add a New Food/Service** Item button , located on the right-hand side of the grid.
3. Click into the **Item Name** column and type a name for the new menu item.
4. Press your **[Tab]** or **[Enter]** key to move to the next column.
5. Type a price for the item, into the **Price** column, then move to the next field.
6. Type a quantity into the **Qty** column.
7. Click into the column with the small image on the far right-hand side of the grid.
8. Click the down arrow to choose the appropriate **Item Type** for the new food/service item.
9. **[Optional]** Hold your left mouse button down on the new item you have added and drag it up or down into a different position in the list.
Note: You cannot drag and drop an item if the Food/Service column has been sorted; you will be prompted to clear column sorting.
10. **[Optional]** Create a detailed description for the new item by typing into the **Description** text box.

* Item Name	Price	Qty	Total	
Chilled Jumbo Shrimp Cocktail	\$80.00	2	\$160.00	
Filet with Balsamic Glaze	\$31.95	50	\$1,597.50	
Parsley Potatoes	\$4.95	50	\$247.50	
Green Beans Almondine	\$4.95	50	\$247.50	
Chocolate Cake	\$6.95	50	\$347.50	


 **Food**
 Beverage
 Liquor
 Equipment
 Labor
 Room
 Other

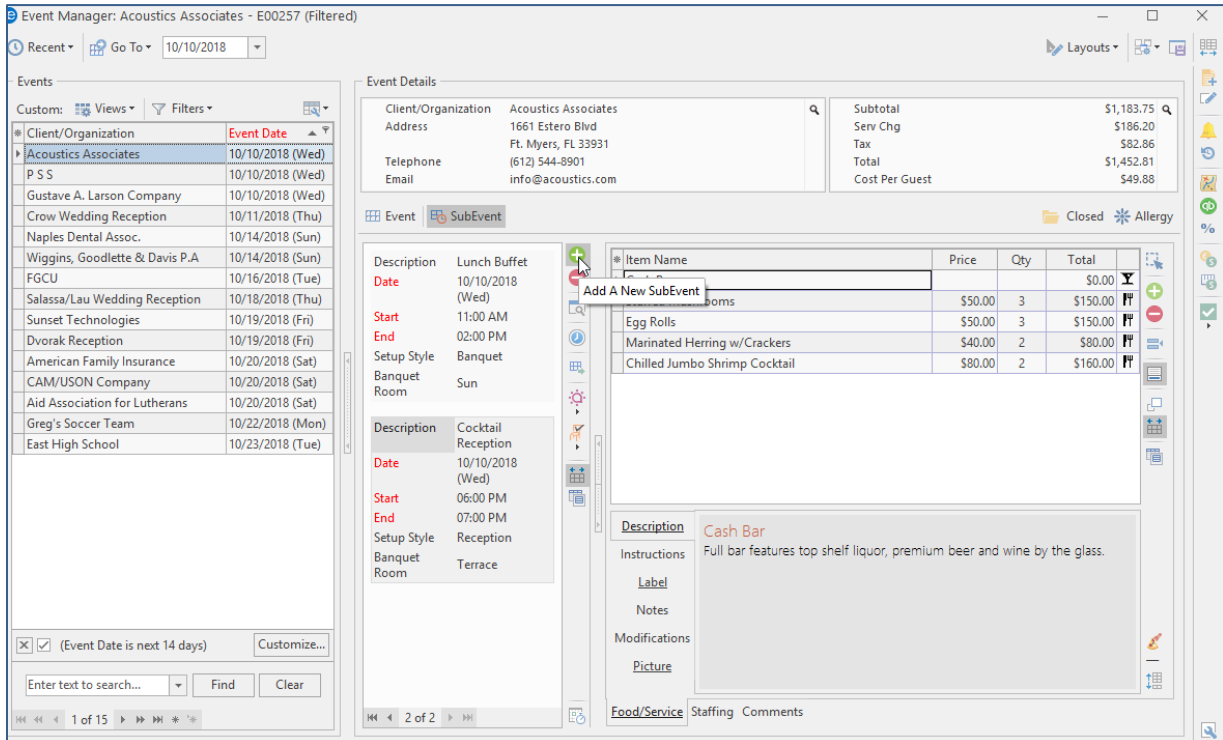
Description Chocolate Cake

(See [Event Wizard Step 3.](#))

(See [Food/Service Item Types.](#))

Adding a Second Sub-Event

1. Click the **Sub-Event** button in Event Manager.
2. Click the **Add A New Sub-Event** button , located on the **Sub-Event** pane.
3. Fill out the Sub-Event details, as described previously.
4. Optionally rearrange multiple sub-events by clicking on a sub-event, then dragging and dropping into the desired position.



The screenshot shows the 'Event Manager: Acoustics Associates - E00257 (Filtered)' window. The left pane lists events, with 'Acoustics Associates' selected for 10/10/2018 (Wed). The right pane shows 'Event Details' for 'Acoustics Associates' with contact information and a subtotal of \$1,183.75. Below this, the 'SubEvent' pane is active, displaying a table of items:

Item Name	Price	Qty	Total
Egg Rolls	\$50.00	3	\$150.00
Marinated Herring w/Crackers	\$40.00	2	\$80.00
Chilled Jumbo Shrimp Cocktail	\$80.00	2	\$160.00

A tooltip 'Add A New SubEvent' is visible over the top-left corner of the item table. Below the table, there are sections for 'Description' (Cocktail Reception), 'Date' (10/10/2018 (Wed)), 'Start' (06:00 PM), 'End' (07:00 PM), 'Setup Style' (Reception), 'Banquet Room' (Terrace), and 'Cash Bar' instructions.

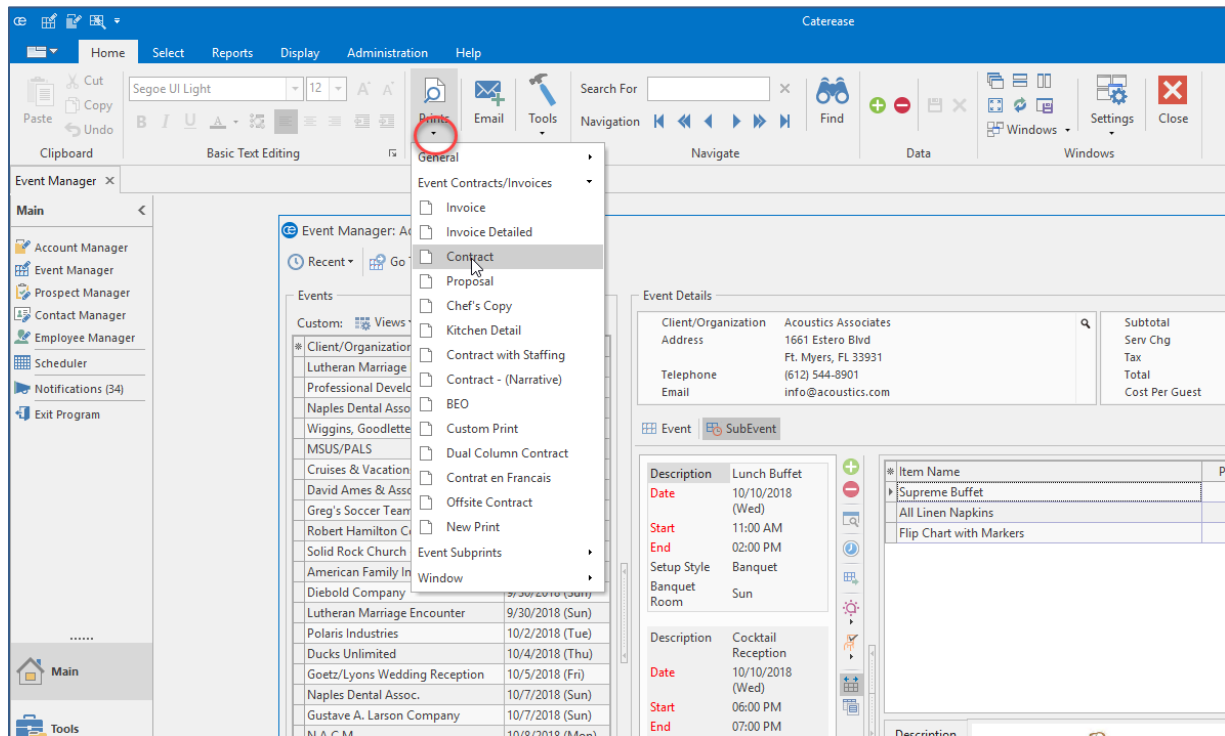
tip A sub-event in Caterease is essentially a meal: the menu, venue, and time of the party. The term "sub-event" implies that you can have many of them, perhaps breaking a long party into a "Breakfast," an "Afternoon Meeting," and a "Cocktail Reception," or perhaps including meals from multiple days within one single event.

(See [Creating a Sub-Event.](#))

Generating the Contract (or Other Print)

Printing the Contract (or Other Print)

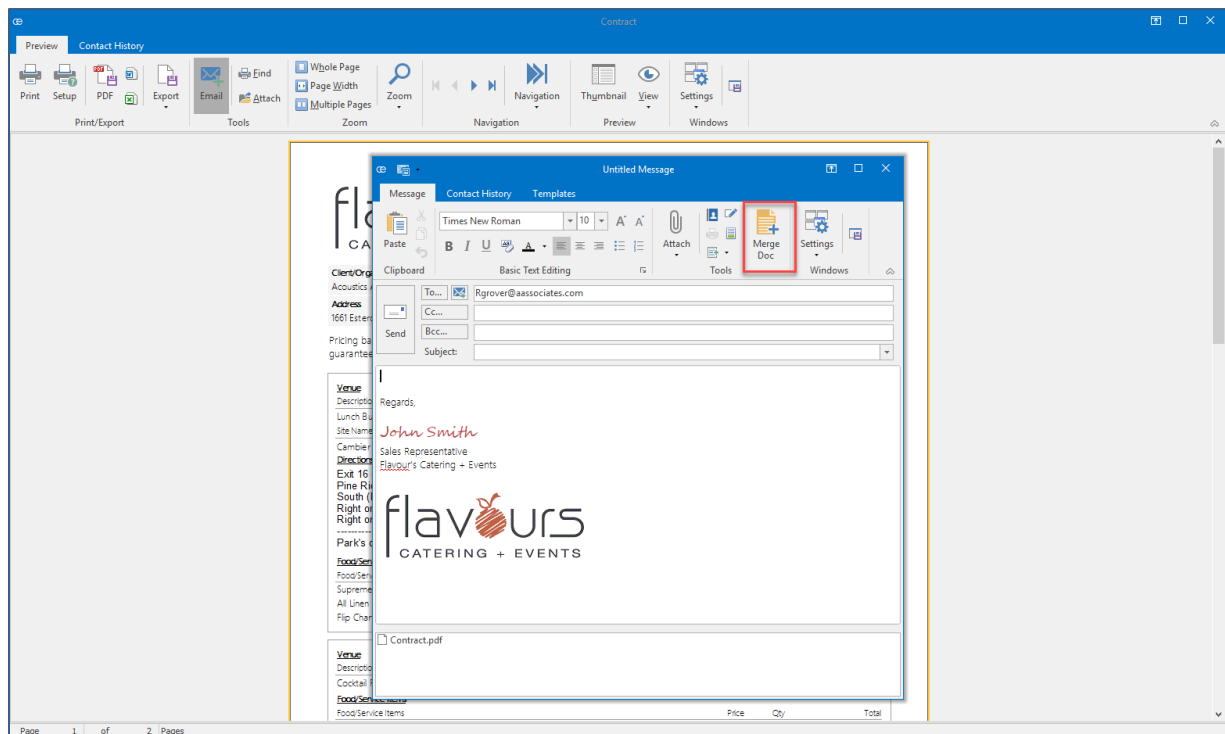
1. From the open event in Event Manager, click the down arrow on the bottom portion of the **Prints** button, located at the top of your screen.
2. Click **Event Contracts and Invoices** and choose **Contract** (or other desired print).
3. From the Print Preview screen, click the **Print** button, located on the upper left-hand side of your screen.



(See [Printing Event Prints.](#))

E-mailing a Contract (or Other Print)



1. From the Print Preview screen, click the **Email** button, located at the top of your screen.
Note: The print will be attached as a PDF, although you can change the file type, if desired.
2. Enter additional e-mail addresses into the Cc and Bcc fields, separating each address by semicolons.
Note: The To field auto-populates default e-mail addresses.
3. Type a subject into the Subject field or select an option from the quickpick list at the right of the field.
4. Type the e-mail body into the text block or select a custom merge letter by clicking the **Merge Doc** button (available with the Marketing Tools add-in module).
5. Optionally click the **Attach** button to attach additional prints/files.
Note: You can also create e-mail templates.
6. Click the **Send** button.

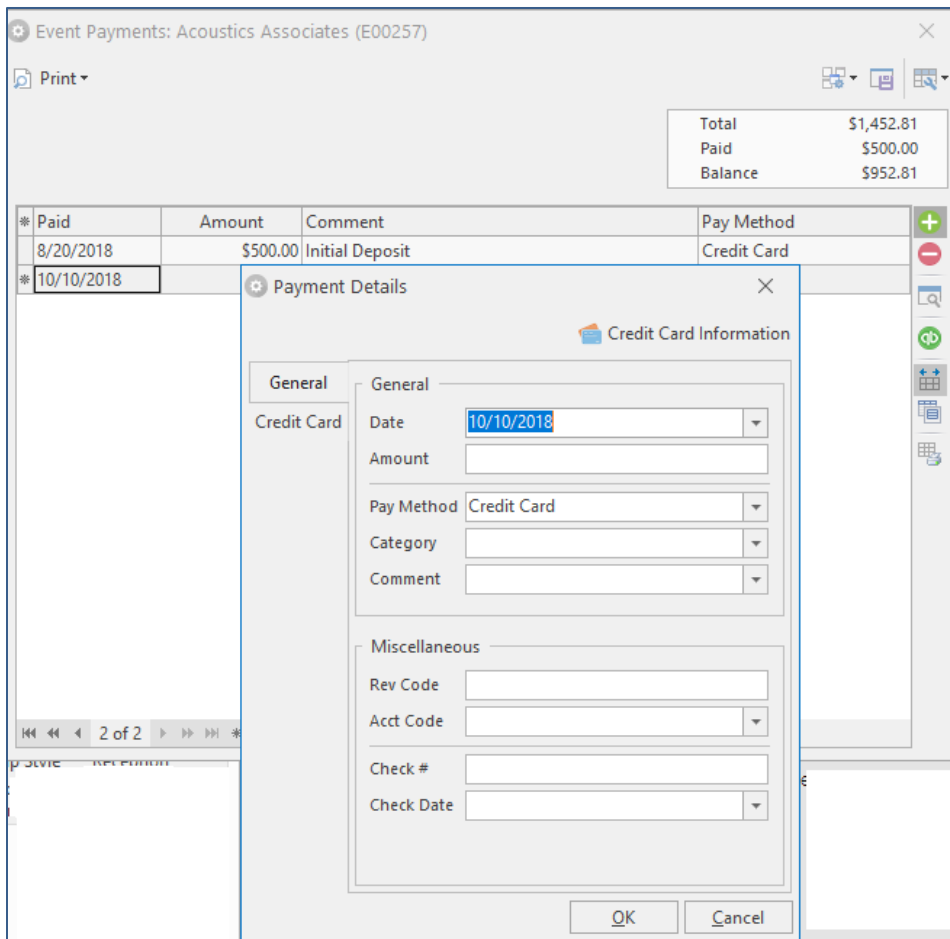


(See [Emailing an Event Print.](#))

(See [Creating Email Templates.](#))

Posting a Payment

1. In Event Manager, click the **Payments Made** button , located in the toolbar on the upper right-hand side of your screen or from the **Tools** menu at the top of your screen.
2. Click the **Add Payment** button , located on the right-hand side of the Event Payments window.
***Note:** The current date defaults as the new payment date, but this can easily be edited.*
3. Enter a dollar amount into the Amount field.
4. Select a Pay Method from the drop-down quickpick list (or accept the default).
5. Optionally enter a Category or choose a category from the drop-down quickpick list.
***Note:** Examples of categories might include "Initial Deposit," "Final Payment," etc.*
6. Enter a Comment, if desired.
7. **[Optional]** Enter credit card details (if posting a credit card payment).
8. **[Optional]** Enter additional information, including a Revenue Code or Account Code for the payment, as well as Check # and Check Date.
9. Click **Ok**.



The screenshot shows the 'Event Payments: Acoustics Associates (E00257)' window. At the top right, a summary box displays: Total \$1,452.81, Paid \$500.00, and Balance \$952.81. Below this is a table with columns: * Paid, Amount, Comment, and Pay Method. The table contains two rows: one for 8/20/2018 with an amount of \$500.00 and comment 'Initial Deposit' (pay method 'Credit Card'), and another for 10/10/2018. A 'Payment Details' dialog box is open over the 10/10/2018 row. The dialog has a 'Credit Card Information' tab. Under the 'General' section, it shows: Date (10/10/2018), Amount (empty), Pay Method (Credit Card), Category (empty), and Comment (empty). Under the 'Miscellaneous' section, it shows: Rev Code (empty), Acct Code (empty), Check # (empty), and Check Date (empty). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

* Paid	Amount	Comment	Pay Method
8/20/2018	\$500.00	Initial Deposit	Credit Card
* 10/10/2018			

(See [Adding an Event Payment.](#))


Customizing Quickpick Lists

tip Throughout Caterease the majority of fields offer “quickpick lists,” which are drop-down lists of choices you can select to keep your data entry consistent.

1. Click the **Quickpicks** button from the **Setup** sidebar.
2. Click the expand button to the left of any quickpick category to view the corresponding lists. Optionally click

the **Full Expand** button  to view all categories.

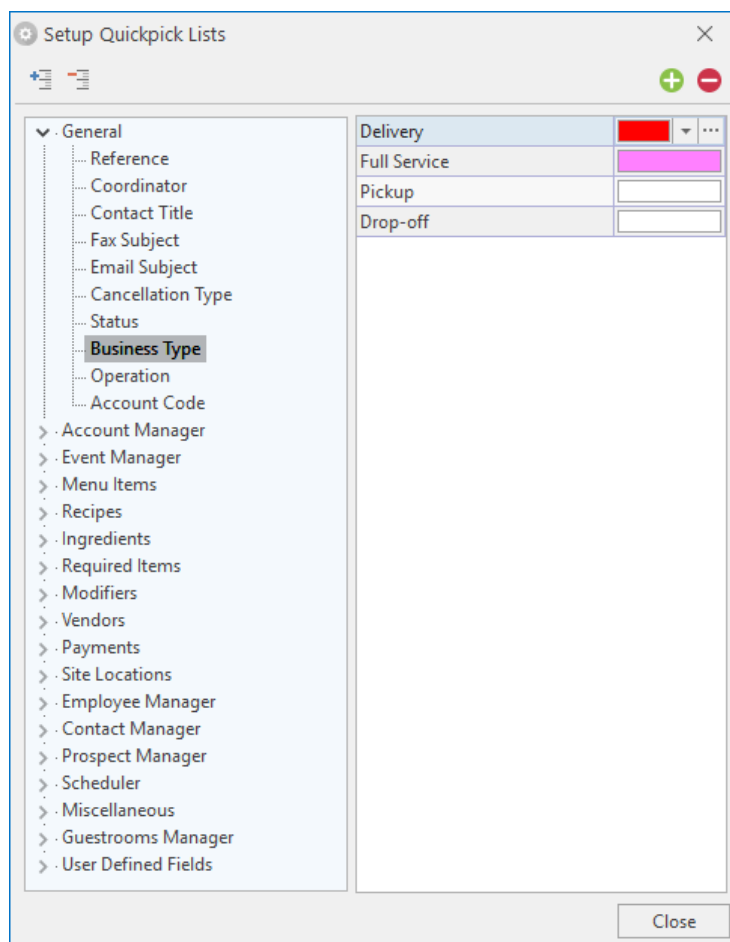
3. Click the desired quickpick list category to select it.

4. Click the **Add New Item** button  at the top right-hand side of the window to add a new quickpick to the list.

Note: In certain lists, you can apply a color to the item. Click the down arrow to select a new color; click the ellipsis button (...) to set a custom color.

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

Note: Delete an item from the list by clicking the **Delete Current Item** button .



(See [Customizing Quickpicks](#))



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



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