

TRAINING GUIDE

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www.caterease.com

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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.

tip 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.

- **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.

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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.

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Frequently Used Buttons

Adding Records: Anytime you want to add anything new in the program, you will click a green

plus sign button ¹. Located in numerous places throughout the program, the **Add Record** button ¹ 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.

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

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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.

G Event Manager: Acoustics Associates - E00257		- 🗆 X							
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tip 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 subevents, 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.

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tip 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.

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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.

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(See <u>Event Wizard Step 1</u>)

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.
- 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.

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(See Event Wizard Step 1.)

(See Making Fields Required.)

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.

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(See <u>Event Wizard Step 1</u>.)

Completing the Informational Fields

Filling out General Details

- 1. Enter details into simple text fields, such as the <u>Party Name</u> 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 <u>Date</u> 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

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button end dragging and dropping times into position.

(See <u>Event Wizard Step 1</u>.)

(See <u>Customizing Quickpicks</u>)

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 <u>Setup Style</u> field, then select a setup style from the corresponding quickpick list.
- 3. Click the down arrow to the right of the <u>Room</u> field and select a room from the list.
- 4. **[Optional]** Click into the <u>Room Charge</u> field and enter a room charge (or accept the default).
- 5. **[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.

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(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.



(See <u>Event Wizard Step 2</u>.)

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

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(See <u>Event Wizard Step 2</u>.)

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.)

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(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.
- [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		G
Chilled Jumbo Shrimp Cocktail	\$80.00	2	\$160.00	I۳	
Filet with Balsamic Glaze	\$31.95	50	\$1,597.50	I۳	
Parsley Potatoes	\$4.95	50	\$247.50	I۳	
Green Beans Almondine	\$4.95	50	\$247.50	I۳	≡•
I Chocolate Cake	\$6.95	50	\$347.50	R	
				M ₽ Y	Food Beverage Liquor
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Description Chocolate Cake				⊟ ?	Room Other

(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 [1], 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.

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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 <u>Creating a Sub-Event</u>.)

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.

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Tools	Trapies Denial Assoc. To///2018 (Sun) Gustave A. Larson Company 10/7/2018 (Sun) N.A.C.M. 10/8/2018 (Mon)	End 07:00 PM

(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 addressed into the <u>Cc</u> and <u>Bcc</u> fields, separating each address by semicolons.

Note: The <u>To</u> field auto-populates default e-mail addresses.

- 3. Type a subject into the <u>Subject</u> 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.

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(See *Emailing an Event Print*.)

(See Creating Email Templates.)

Posting a Payment

- 1. In Event Manager, click the **Payments Made** button [6], 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 <u>Pay Method</u> from the drop-down quickpick list (or accept the default).
- 5. 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.
- 6. Enter a <u>Comment</u>, if desired.
- 7. **[Optional]** Enter credit card details (if posting a credit card payment).
- 8. **[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>.
- 9. Click **Ok**.

Event Payments	: Acoustics Asso	ciates	(E00257)				×
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(See Adding an Event Payment.)

Customizing Quickpick Lists

- 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

Setup Quickpick Lists		\times
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		Close

(See <u>Customizing Quickpicks</u>)

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.

NOTES



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William .