TRAINING GUIDE

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Creating Custom Event Prints

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Adding a New Event Print in Print Designer

In Caterease, you have a Print Designer that allows you to create as many prints as you want, to serve any purpose you need. The Print Designer offers a template-based approach to modify the various event prints (contracts, invoices, proposals, back-of-house prints) you generate from the program.

Accessing the Print Designer

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.

2. Click the **Print Designer** button.
   Result: *The Print Designer window opens.*
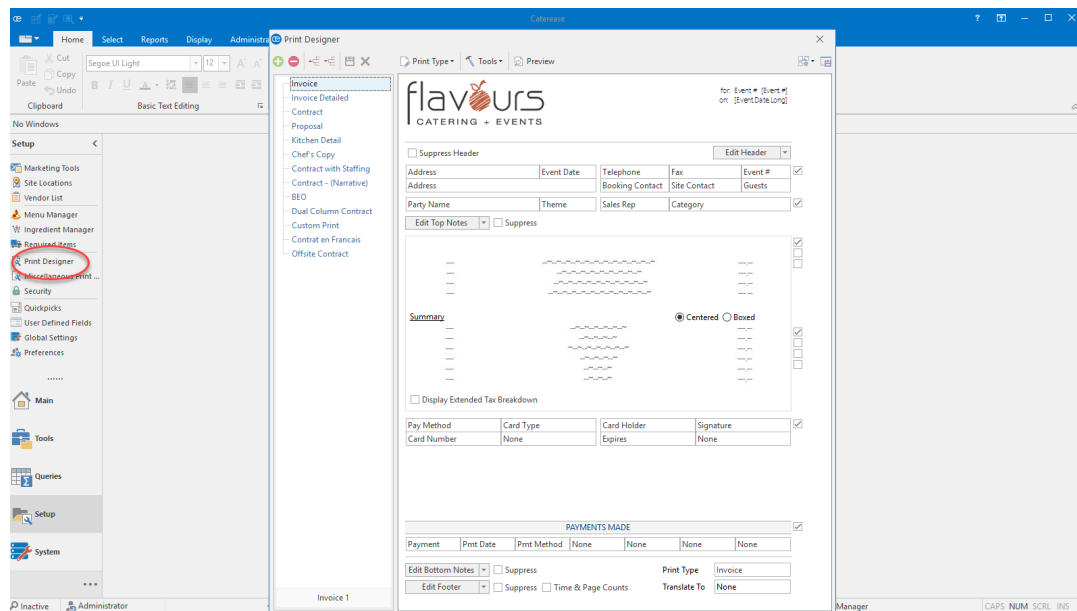
Adding a New Print

1. Click the **Add Print** button ⊕, located at the top left-hand side of the Print Designer window.
   Result: *A confirmation message appears.*

2. Click **Yes** to confirm your choice.
   Result: *The Add New (Print Layout) window opens.*

> **Tip:** *You can drag and drop titles into different positions on the list, as well. This will affect their positions in your Prints menu.*

3. Click into the **Add A New Print** checkbox (if it is not already selected).

4. Click on a Layout on the left-hand side of the window to select it.

5. Select a Print Format by clicking the appropriate radio button: **Lined** or **Shaded**.
   Note: *In the Lined option (ideal for printing), lines are lighter, and all shading has been removed from section headings. In the Shaded option (for e-mailed PDF's), lines are limited and shading is soft.*

6. Click **OK**.
   Result: *A new print is added to the bottom of your prints list.*

7. Type a title for your new print, over the words "New Print."

8. Press **[Enter]** to save your changes.
   Note: *This is the title that will appear in your **Prints** drop-down menu. In other words, this is the title you will select to generate this print.*

Creating Sub-Menus in Print Designer

1. Click the **Add Print** button ⊕ , located on the top left-hand side of the Print Designer/Miscellaneous

Print Designer window.
Result: A confirmation prompt appears.

2. Click **Yes** to confirm.
   Result: The Add New window opens.

3. Click into the **Add a New Print Header** checkbox.

4. Type the Header Caption into the blank field.

5. Click **OK**.

Tip: Drag and drop your headers or prints, creating menus or sub-menus as desired.

6. Click the **Save Changes** button on the subsequent screen.

7. Drag and drop prints into the new group.

Selecting a Print Layout

In all Print Layouts (except Invoice), you can do the following:

- Customize the header, footer, and top and bottom notes sections (including logo, title, dynamic merge fields, etc.).

- Move or remove specific details within the confines of the print layout, e.g., move "Sales Rep" to another spot, remove pricing information from the menu section, etc.

- Include or suppress details, such as allergy information; site location information; room and time information; menu information; ingredients (not available in Layout 1); staffing; sub-event comments; event notes; timeline; financial totals; payment details; future deposit schedule; and custom notes, to act as terms and conditions.

- Filter the menu section, allowing you to create a print that only displays food, for example, or that separates appetizers from entrees, etc.

Layout Description Table

Layout	Description
Layout 1	Shows the details of each sub-event of a party (times, venue, menu, comments/requests, staffing) in separate boxes in the middle of the print. All other layouts group all venues/times together, all menu items together, all staffing together, etc. (Also, this layout does not allow inclusion of ingredients.)
Layout 2	Shows general event information in two columns at the top of the print, as opposed to in rows of boxes (as in all other layouts).
Layout 3	Separates menu items for all sub-events into two sides of the print: half on the left and half on the right. Filters can be established to determine which items appear on which side of the print.
Layout 4	Does not display details on the left and right sides of the print separately.
Layout 5	Separates menu items on the left and right sides of the print, as in Layout 3, above. Also, shows sub-event venues/times on the right and sub-event comments on the left.
Layout 6	Separates menu items on the left and right sides of the print, as in Layout 3, above. Also, shows sub-event venues/times on the right, sub-event comments on the left, bottom notes (terms and conditions) on the bottom left, and financial details on the bottom right.
Invoice Layout 1	Designed in an "invoice" format rather than in a detailed "contract" format. Lets you show menu item details in a centered list or include a breakdown of general finances (food totals, beverage totals, etc.), or both. Also, lets you decide whether or not to include items without values from the event.

Changing a Print Title

You can easily copy a print, then rename the print's title.

Changing a Print Title in Print Designer or Miscellaneous Print Designer

1. Right-click on the print title (in Print Designer or Miscellaneous Print Designer) you would like to change.
   Result: *A pop-up window opens.*

2. Choose **Rename Print/Heading**.

3. Type a title for your new print into the highlighted field.

4. Press **[Enter]** to save your changes.

Hiding Prints from the Selection Menu

You are able to hide prints in your Print Designer or Miscellaneous Print Designer. Once hidden, the prints will not be available for selection within the selection window.

Hiding Prints from the Selection Menu

1. In Print Designer or Miscellaneous Print Designer, click on the name of the print you would like to hide.

2. Right-click and choose **Hide Print in Menu**.
   Result: A confirmation prompt appears.

3. Click **OK**.
   Result: On-screen, hidden prints will appear grayed out and with a strike-through line. Additionally, prints that are hidden will not be available for selection within the selection window.

> *Tip: Right-click on the name of the print and choose Display Print in Menu to make the print visible again.*
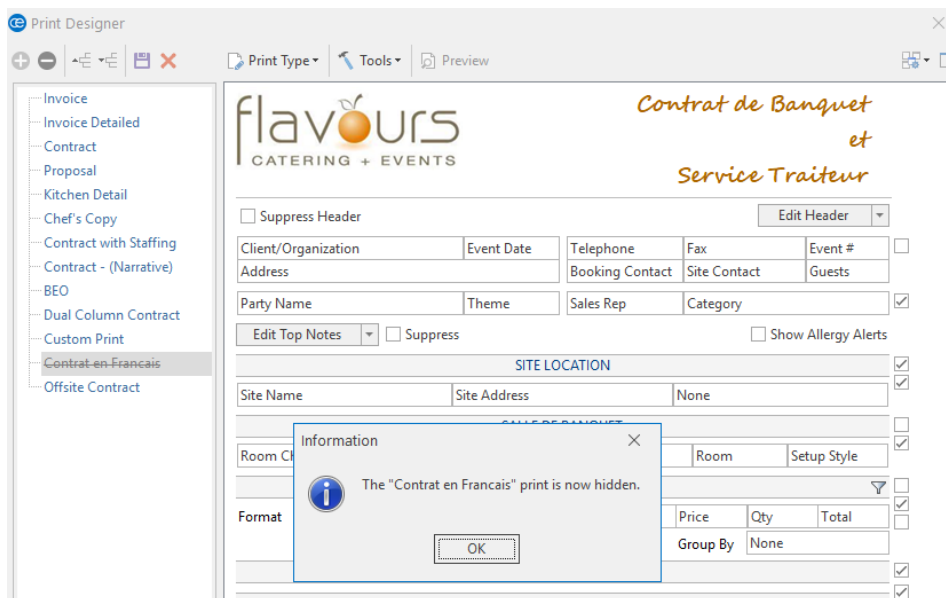
Adding a New Prospect Manager Proposal

If you own the Prospect Manager add-in module, you are able to create and edit prints in your Print Designer.

Adding a New Prospect Manager Proposal

1. Click the **Setup** sidebar on the left-hand side of your screen.

2. Click the **Print Designer** button.
   Result: *The Print Designer window opens.*

3. Click the **Print Type** button, located at the top of the window.

4. Choose **Prospect Manager > Proposal.**
   Result: *The list of titles in the left-hand pane of the window updates to show all current prints of this type.*
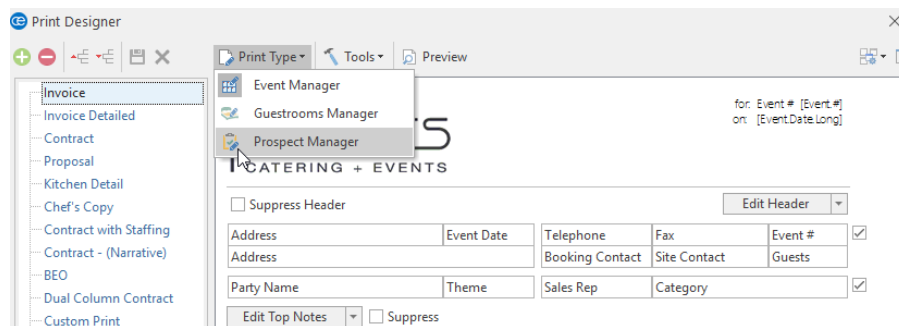
5. Click the **Add Print** button , located in the toolbar on the upper left-hand side of the window.
   Result: *A confirmation message appears.*

6. Click **Yes** to confirm your choice.
   Result: *A new print title is added to the list in the left-hand pane of the window, with your cursor ready to type a name for the print.*

7. Type a name for your new print.

8. Press the **[Enter]** key.

9. Edit the body of the text (including choosing which fields appear where, and editing header, footer, and notes).

10. When finished, click the **Save Changes** button , located on the upper left-hand side of the window.

Adding a New Guestrooms Manager Print

If you own the Guestrooms Manager add-in module, you are able to create and edit prints in your Print Designer.

Adding a New Guestrooms Manager Print

1. Click the **Setup** sidebar on the left-hand side of your screen.

2. Click the **Print Designer** button.
   Result: The Print Designer window opens.

3. Click the **Print Type** button, located at the top of the window, and choose **Guestrooms Manager**.
   Result: The list of titles in the left-hand pane of the window updates to show all current prints of this type.
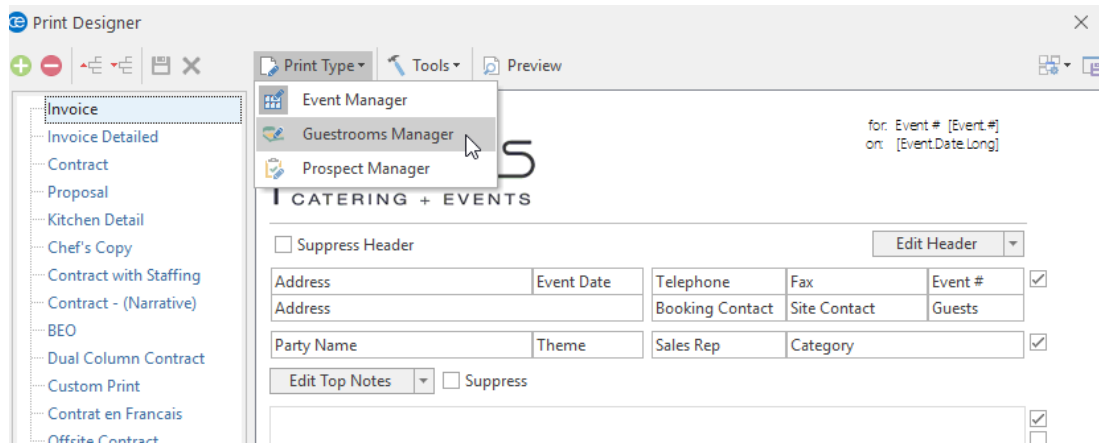

4. Click the **Add Print** button , located in the toolbar on the upper left-hand side of the window.
   Result: A confirmation message appears.

5. Click **Yes** to confirm your choice.
   Result: A new print title is added to the list in the left-hand pane of the window, with your cursor ready to type a name for the print.

6. Type a name for your new print.

7. Press the **[Enter]** key.

8. Edit the body of the text, including choosing which fields appear where, and editing header, footer, and notes.

9. When finished, click the **Save Changes** button , located in the toolbar on the upper left-hand side of the window.

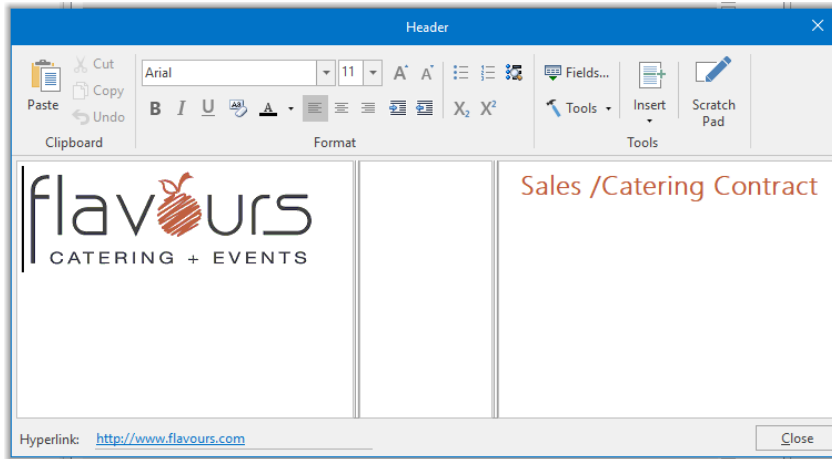# Unit 2: Customizing Event Prints in Print Designer

In this section, you will learn:

Editing the Header or Footer of a Print
Adding an Image/Logo to the Header
Inserting Merge Fields into the Header
Customizing and Suppressing General Information
Editing Top and Bottom Notes Sections
Showing an Event Timeline on an Event Print
Changing Print Fonts

Editing the Header or Footer of a Print

1. In Print Designer, click the **Edit Header** (top right) or **Edit Footer** (bottom left) button.
   Result: The Header or Footer window opens, with three panes to optionally separate information.

2. **[Optional]** Stretch or shrink any pane by holding your left mouse button down on the inside frame and dragging left or right.
   Note: You can also set all three panes to equal widths by clicking the **Tools** *button at the top of the Header/Footer window and choosing* **Set Equal Widths***.*

3. Click into any pane and type as desired, using the toolbar at the top of the window to format text, center, or right-justify, etc.

4. **[Optional]** Insert images (logos, pictures, etc.), by clicking the **Insert** button at the top of the window and choosing **Image**, then browsing to the image you want to insert.
   Note: Images can be placed into any pane in the Header/Footer, and can be justified (left, center, right) just like text. Previously placed images can be saved to your hard drive by right-clicking and choosing **Save to File***.*

5. **[Optional]** Insert merge fields (to dynamically merge information from the event, such as the event number, revised date, etc.), by clicking the **Fields** button , located at the top of the window, expanding a category of fields, then double-clicking a specific field.

6. **[Optional]** Click in the Hyperlink field at the bottom of the Header/Footer window and enter a URL (web address) to attach to this areas of the print.
   Note: When you e-mail this print, the recipient can click any part of this header or footer and be sent to the designated web address.

7. **[Optional]** Adjust the desired height for your Footer by clicking the up-and-down arrows to increase or decrease the height, respectively.
   *Note: Footer heights can range from .5" through 3" (or 1 cm through 8 cm if **Metric** has been enabled in your program's Global Settings).*

Adding an Image/Logo to the Header

A logo is the identifying element for the brand of a company, and is designed to create immediate recognition. Adding your company logo to a print could not be easier.

1. From a print in Print Designer or Miscellaneous Print Designer, click the **Edit Header** button.

2. Click on the pane within the header where you would like your logo/image to appear.

3. Click the **Insert** button, located at the top of the Header window, and select **Image**.
    *Note: Alternatively, you may right-click inside the pane and choose **Insert > Image**.*
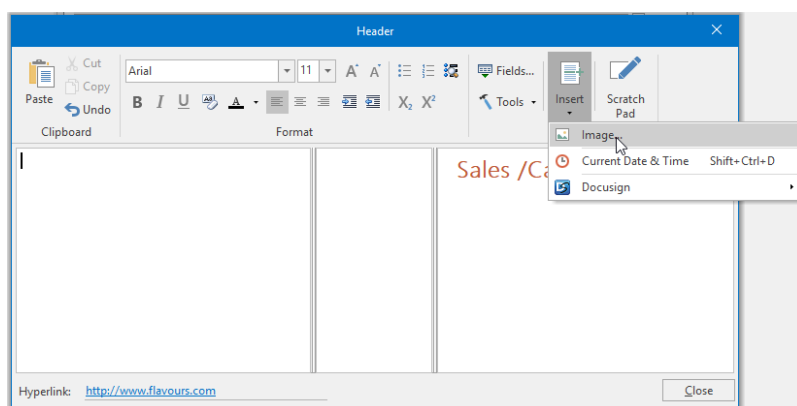
4. Browse to the image you want to insert.

5. Double-click the image to insert it into the pane.
    Note: Images can be justified (left, right) or centered, just like text.

6. Click the **Close** button to close the Header window.

Inserting Merge Fields into the Header

Merge fields are dynamic fields that automatically merge specific information from a particular customer or event. For example, you could type the words "Last Revised On:" followed by a merge field that pulls in the event's revision date. Then, when you generate that print from any event, the merge field will automatically insert the specific revision date of that particular party. It's a great way to make your various prints look custom-created each time you generate them.

1. In Print Designer, click the **Edit Header** button.
   Result: *The Header window opens.*

2. Click on the pane within the header where you would like your merge fields to appear.

3. Type any text you want to precede your merge field.
   Note: *You may want to identify the merge field for the person reading the print; for example, "Revised Date," "Party Name," etc.*

4. Click the **Fields** button ⊞▾, located towards the top right-hand side of the text window.
   Result: *The Fields Explorer window opens.*
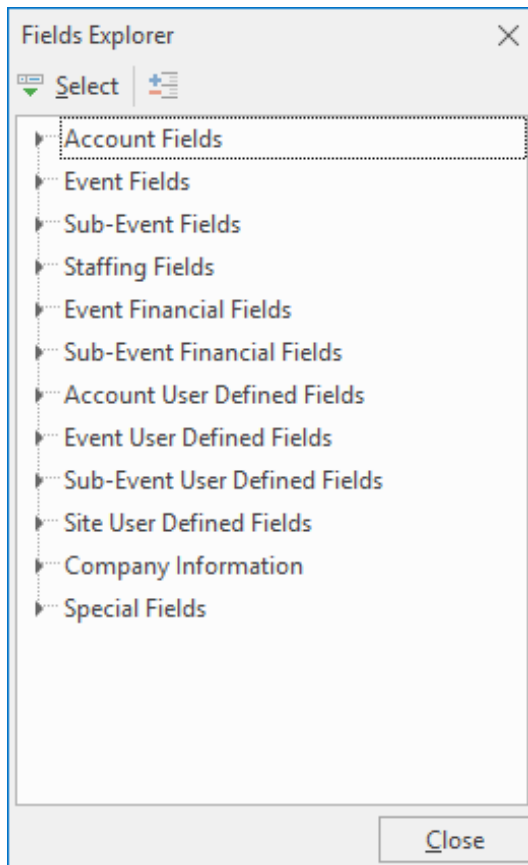
5. Click the expand button (triangle) to the left of the group of merge fields you want to access.
   Result: *The selected group expands, showing all related merge fields.*
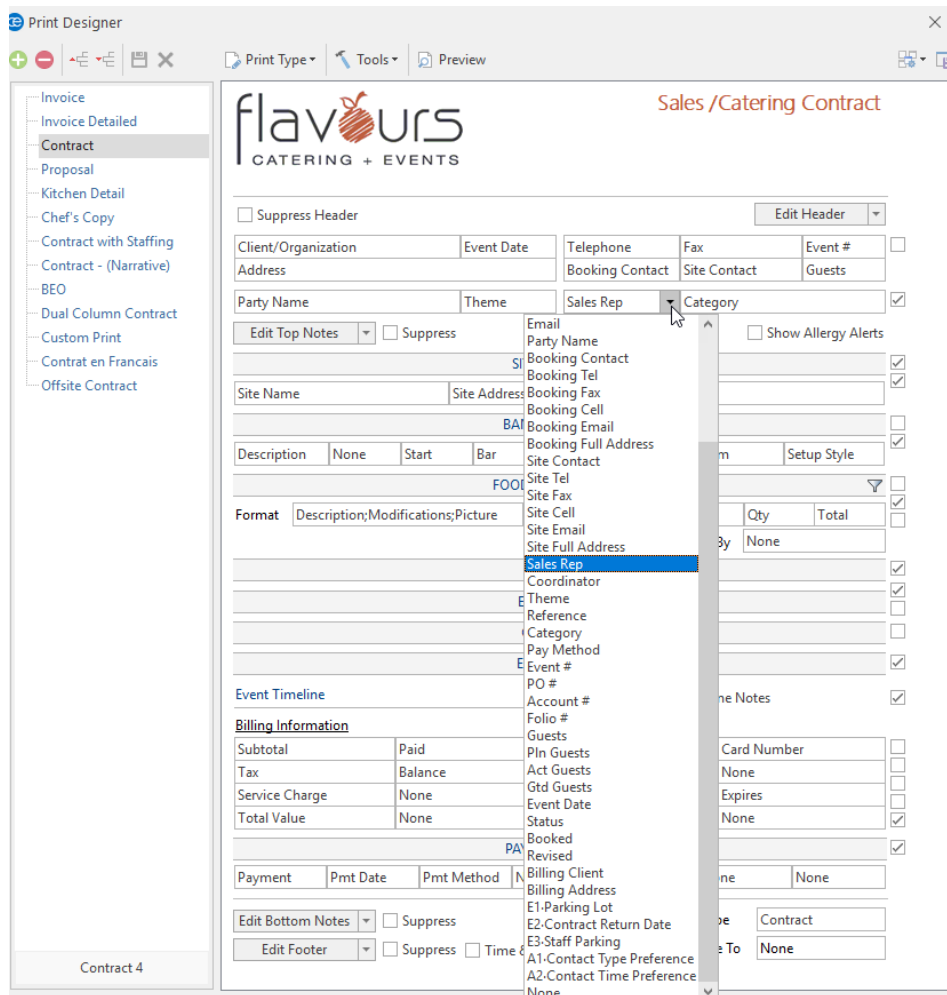
   Note: *As an option, click the **Full Expand** button, located at the top of the Fields Explorer window, to expand all categories of merge fields.*

6. Select the field you want to insert, and either double-click it or drag and drop it into the text window.
   Result: *Double-clicking a merge field inserts it where the cursor is currently positioned, whereas drag-ging and dropping a field allows you to place it anywhere.*

7. Continue this process until you have entered all of your desired merge fields.

8. Close the window, and then click the **Save Changes** button 💾 on the subsequent screen.

Customizing and Suppressing General Information

1. In the Print Designer window, click the down arrow to the right of any field in a print to choose a dif-ferent detail to appear there.
   Note: *General event details, site location information, venue and time details, etc., can be removed or rearranged in this way.*

2. Choose to suppress various sections of the print by clicking the corresponding checkbox, most of which are located along the right-hand side of the Print Designer window, next to a specific section of a print.
Note: Float your mouse pointer over any checkbox for a tool tip identifying its corresponding section. (In most cases, a check in a box causes a section to be suppressed on the print.)

3. **[Optional]** Click into the gray "heading" box of any section and type a different heading, if desired.

Editing Top and Bottom Notes Sections

1. In Print Designer, click the **Edit Top Notes** (top left) or **Edit Bottom Notes** (bottom left) button.
Result: The text block for the selected section appears, with two panes to optionally separate information.
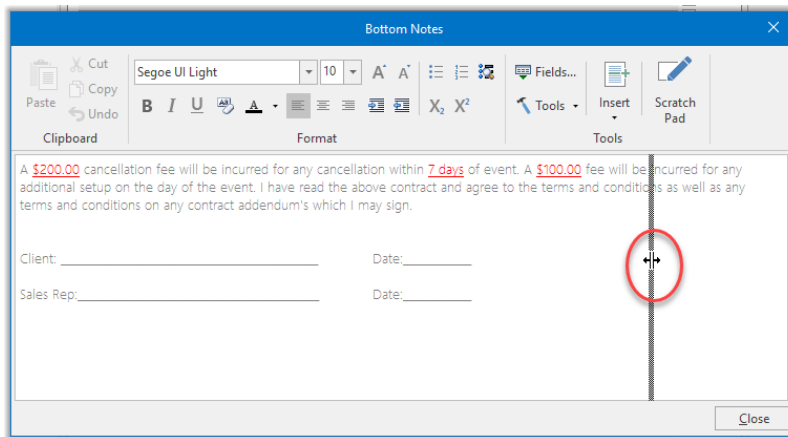
2. **[Optional]** Stretch or shrink either pane by holding your left mouse button down on the inside frame and dragging left or right. (See image above.)
*Note: You can drag this frame all the way to one side if you only want one pane of information. You can also set the panes to equal widths by clicking the **Tools** button at the top of the window and choosing **Set Equal Widths**.*

3. Click into either pane and type as desired, using the toolbar at the top of the window to format text, center or right-justify, etc.

4. **[Optional]** Insert images (logos, etc.) by clicking the **Insert** button at the top of the window and choosing **Image**, then browsing to the image you want to insert.
*Note: Images can be placed into either pane, and can be justified (left, center, right) just like text. Previously placed images can be saved to your hard drive by right-clicking and choosing **Save to File**.*

5. **[Optional]** Insert merge fields (to dynamically merge information from the event, such as the event number, revised date, etc.), by clicking the **Fields** button at the top of the window, expanding a category of fields, and then double-clicking a specific field.

Showing an Event Timeline on an Event Print

1. From a layout in the Print Designer (Contract/BEO, for example), locate the **Event Timeline** section towards the bottom of the print.

2. To display the timeline on the print, ensure the Event Timeline has not been suppressed; i.e., ensure that the checkboxes next to the timeline and timeline notes do not contain check marks.
   Result: The timeline and any timeline notes will display on the print.
   Note: A timeline must exist in Event Manager for this event in order for the timeline and associated notes to display on the print.

3. If you do not want to display the timeline notes, click the checkbox to the left of **Suppress Event Timeline Notes**.
   Result: Any timeline notes that have been entered into the event within Event Manager will not display on the print.

4. If you do not want to display the timeline, click the checkbox on the far right-hand side of the screen, next to **Suppress Event Timeline**.
   Result: Neither the timeline nor the timeline notes entered into the event within Event Manager will display on the print.

Changing Print Fonts

1. Click the **Tools** button at the top of the Print Designer window and choose **Print Fonts**.
   Result: *The Fonts window opens.*

2. Choose a different font style and/or size for various areas of the print.
   Note: *The **Font Preview** section at the bottom of the window will update to reflect your changes.*

3. When finished, click **OK**.
   Result: *The Font window changes, but the preview in Print Designer will NOT reflect your new font selections.*
   Note: *To review your new fonts, save the print and click the **Preview** button at the top of the Print Designer window. (Remember, you must have an event open in Event Manager in order to preview a print.)*

Unit 3: Customizing Sub-Event Details on a Print

In this section, you will learn:

Showing/Suppressing Off-Premise Information on a Print
Customizing Sub-Event Information
Customizing the Menu Selection
Using the Food/Service Filter
Establishing an Item as Hidden in an Event
Setting up a Print to Hide Items

Customizing Sub-Event Details on a Print

If you do off-premise events, meaning you cater to locations outside of your facility, you can include inform-ation about those locations on your various event prints. This information can be as general as the name of the location or as specific as the address, phone number, website, and driving instructions.

Of course, if you do not do off-premise events, this information can (and should) be suppressed from your prints.

Showing/Suppressing Off-Premise Information on a Print

1. **[Optional]** Click into the section heading labeled "Site Location" on the print, and type a heading as desired.
   Note: *This section heading is not available in Layout 1.*

2. Verify whether or not the **Suppress Site Location** checkbox, located to the right of the **Site Location** section of the print in Print Designer, is checked.
   Note: *When these checkboxes contain checks, the corresponding sections of the print will be sup-pressed (the section will not appear).*

3. **[Optional]** Verify whether or not the **Suppress Directions** checkbox (directly below the **Suppress Site Locations** checkbox) is checked.

4. Click the down arrow to the right of the fields under the **Site Location** section of the print, and either select a field to appear, or select **None**.

5. Repeat the steps above for other fields in the section.

Customizing the Menu Section

One of the most significant ways you can customize an event print is by formatting its menu item details. Consider this: Every menu item in your program has not only a name, but likely also has a more detailed description of the item. For example, a breakfast item might have the name "Harbor Buffet," and also a description that explains the item in more detail: "Includes fluffy scrambled eggs; French toast; bacon and sausage; hash-brown potatoes; fresh fruit; English muffins; assorted pastries; chilled fruit juice; coffee, tea, or milk." You may want to design some prints to include this detailed description of each event's menu items, while other prints only show the names.

In addition, there are other menu item fields you may want to have appear on your various prints. A customer's contract, for example, will typically include prices and totals for each menu item, while a back-of-house (or kitchen) print might only include quantities. These choices are all entirely up to you, and can be made and revised quite easily in your Print Designer.
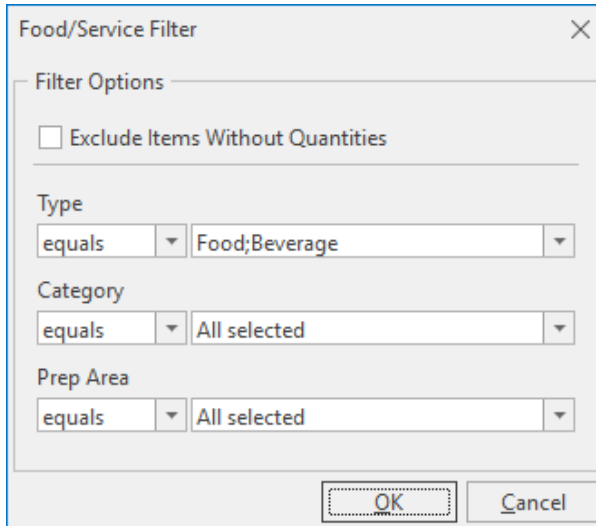
1. Locate the **Menu** section, towards the middle of the print.
   Note: In Layouts 1, 2, and 4, this section is titled "Food/Service Items," by default. In Layouts 3, 5, and 6, it is called "Food and Beverage" on the left and "Equipment and Miscellaneous" on the right.

2. Click the down arrow next to **Format** in the **Food/Service Items** section on the left-hand side of your Print Designer screen.
   Result: *A drop-down list of options appears.*

3. Choose to include the item name and description of menu items on the print, just the item name or just the description, a picture of the item, or any modifications made to the item.
   Note: *You may also elect to display the quantity of each food/service item by clicking the* **QTY** *check-box.*

4. Click the down arrow to the right of the next field.

5. Choose to include any of the optional information from the drop-down list, or choose **None** if you do not want to have anything appear in this column on the print. (See the "Available Menu Item Fields" table.)

6. Repeat Steps 3 and 4 for the rest of the fields in the **Food/Service Items** section.

Using the Food/Service Filter

This option is generally used to have items with a Type of "Food" or "Beverage" appear on the left-hand side of the print, with other items appearing on the right-hand side of the print. You can use this to design prints that only show certain items, such as "Appetizers," Desserts," or even menu items prepared in a certain area.

1. Click the **Food/Service Filter** button ⛛ , located to the right of the Menu selection, and choose which specific items should appear on this print, using the options outlined below.

- **Exclude Items Without Quantities:** This checkbox at the top of the window causes this print to ignore any menu items in an event that do not have quantities associated with them.

- **Type:** Choose (optionally) to include items with a certain Type or Types (Food, Beverage, Liquor, etc.), or only items that do not have a certain Type or Types (Using the **Not Equals** comparison).

- **Category:** Choose (optionally) to only include items with a certain Category or Categories, or only items that do not have a certain Category or Categories.
  Note: This custom quickpick list can be used to separate Appetizers from Entrees or Desserts or separate Beer and Wine from Liquor, etc.

- **Prep Area:** Choose (optionally) to only include items with a certain Prep Area or Prep Areas, or only items that do not have a certain Prep Area or Prep Areas.
  Note: This is also a custom quickpick list and is used to identify the person or persons responsible for preparing the item.

See the table below for a description of the available fields within the Menu Details area.

Available Menu Item Fields

Field	Description
Item Name	Prints the name of each item, in 10-point Times New Roman font.
Description	This item, if checked, prints the Description of each menu item as you have chosen to format it. The first words of the description are usually the name of the item, formatted as desired (bold font, colored text, etc.). *Note: This is the standard preference for customer prints.*
Notes	This item, if checked, prints any detailed notes you might have associated with each menu item. These notes can be used for front-of-house or back-of-house purposes.
Modifications	This item, if checked, allows you to print any on-the fly item changes you have noted in the event using the item's Modifications tab.
Picture	This item, if checked, lets you attach a digital image to any of your menu items so you can show your customers your meal presentations. These images can be displayed on the screen and can also be included in your various event prints.
Bar Code	You can include a bar code as part of any contract. This item, if checked, allows you to print a bar code for any menu/food-service item.
Type	Shows whether each menu item is a Food, Beverage, Liquor, Equipment, Labor, Room or Other item. *Note: Tax and service charge rates for each Type may be different.*
Time	Shows an optional time you may have associated with each menu item.
Unit	Prints the unit of purchase for the menu item; e.g., "By Case," "Box," etc.
Prep Area	Indicates the area or personnel responsible for preparing the menu item; e.g., "Kitchen," Bar," Cold Prep."
Comment	Prints the Comments you have added pertaining to the food/service item. *Note: Comments can be added as quickpick items which you can customize.*
Category	Prints the Category you have chosen to group each item into, based on a quickpick list that you can customize; e.g., "AV Equipment," "Linen," "Beer," "Wine," etc.
Acct Code	Prints a unique identifying number or account code you might have made up for each item. This code is typically used in interfaces with third-party software applications but can be used for in-house tracking as well.
Item ID	Prints a unique identifying number or code (similar to the Account Code, above).
Price	Prints the price your customer will pay for each menu item.
Cost	Prints the cost (to you) for each menu item. *Note: Obviously, you would not want this detail to appear on customer prints.*
Qty	Prints the quantity of each menu item ordered for the event.
Total	Prints the total price for each item, i.e., the price of the item multiplied by the quantity.
None	Leaves a particular column on the print blank. Choose this option anywhere you do not want a specific detail to appear.

Using Food/Service Item Hiding

Menu item hiding is basically a technique for you to pass notes to your kitchen or other back-of-house staff. For example, imagine a customer requests "no garlic" on a particular menu item. In addition to removing garlic from that item's Description or Ingredients List, you may want to make an obvious note that the chef is sure to see. However, that type of note would probably look tacky on a customer's contract. So, you can create the note as you want — perhaps big, bold letters that read NO GARLIC — and then hide it on one print and include it on the other.

Establishing an Item as Hidden in an Event

1. Open an event in Event Manager.

2. Click the **Sub-Event** button to view the Sub-Event display.

3. Right-click the item on the **Food/Service** tab that you want to hide.
   Result: A pop-up menu appears.

4. Select **Special Editing** > **Hide/Unhide Item(s) in Prints**.
   Result: The item becomes italicized to indicate that it will be hidden on any prints that allow item hiding (see "Setting Up a Print to Hide Items.")

> **Tip:** *You can establish menu items to be hidden as a default. For example, you can create a menu called "Modifiers" and populate it with such instructions as "No Onions," "Extra gravy," etc., each of which is hidden automatically when you pull it into an event.*
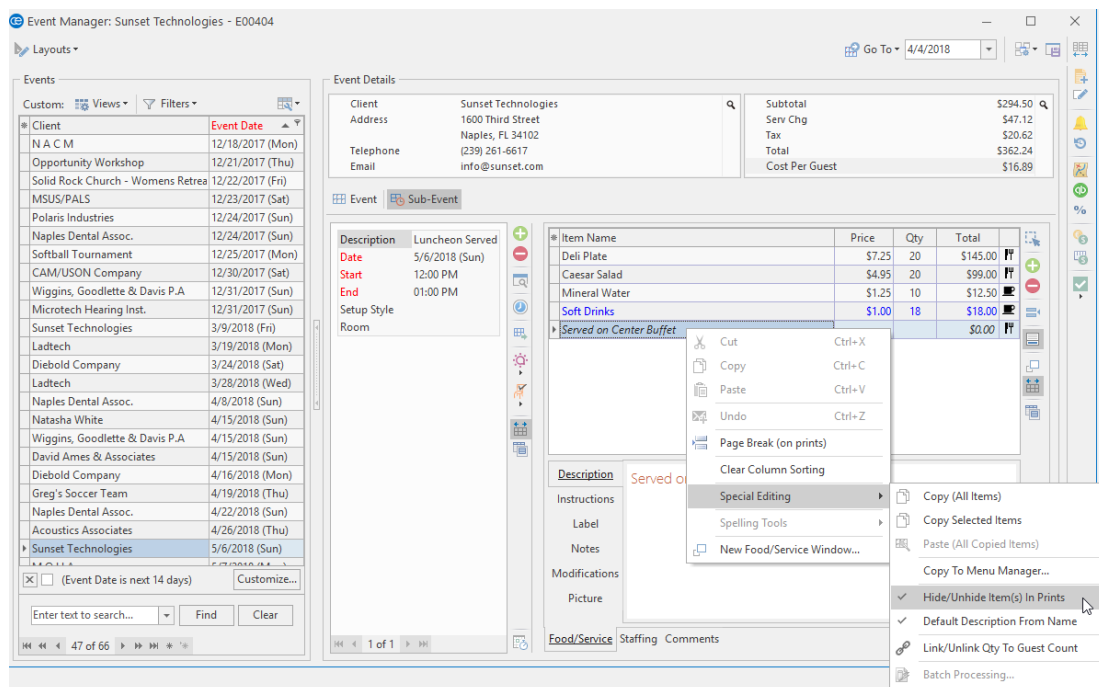
Setting up a Print to Hide Items

1. On any print in your Print Designer, click into the checkbox labeled **Allow Food/Service Item Hiding**,

located midway down the print, on the right.
Result: Any menu item designated as "hidden" in an event will not appear on this print.
Note: To see the label of a checkbox, float your mouse pointer over it without clicking.

2. Remove the check from the checkbox to have hidden items appear on the print, and save your changes.

Unit 4: Customizing Financial Information

In this section, you will learn:

Modifying Financial Information on Prints
Suppressing Billing Information
Showing the Financial Breakdown
Showing Tax/Service Charge Percentages
Showing/Suppressing Miscellaneous Charges and Discounts
Showing Deposits Due
Showing Payment Information

Modifying Financial Information on Prints

1. Open the print you want to modify in Print Designer.

2. Click the down arrow to the right of any field in the **Billing Information** section (bottom of the print).
   Note: In all layouts except Layout 6, the boxes on the right-hand side of this section let you include information about a credit card on file for an event.

3. **[Optional]** Click into one or more of the following checkboxes to the right of the **Billing Information** section to suppress certain financial details on the print, or choose **None** to leave that field on the print blank.

   - **Suppress Billing Information:** Suppresses the entire **Billing Information** section of the print, shown to the left of this checkbox, so it will not appear.

   - **Suppress Financial Breakdown:** Suppresses a section that shows financial information for the event, broken down into totals based on menu item type ("Food," "Beverage," "Liquor," etc.).
     Note: This section is not displayed on the Print Preview screen in Print Designer.

   - **Show Tax and Service Charge Percentages:** With this box checked, the specific tax, service charge, and gratuity rates will appear next to the appropriate label ("Tax," etc.), on the print, along with the total amount.

   - **Suppress Miscellaneous Charges/Discounts:** Suppresses any money entered into Room Charge or Delivery Charge fields of an event from appearing on the print, as well as any discounts that might be applied to an event.
     Note: If this box is not checked, these totals will appear in a special box on the print (not shown on the Print Preview screen in Print Designer).

   - **Suppress Deposit Due Schedule:** Suppresses the list of future deposits due for an event.
     Note: If not checked, the due date and amount of each deposit, along with any associated comment, will be listed.

4. **[Optional]** Click into the checkbox to the right of the **Payments Made** section at the bottom of Print Designer to suppress this information from appearing on the print.
   Note: You can change the heading of this section, and you can click the down arrow next to each field to determine which specific details appear.

Available Financial Fields

Field	Description
Subtotal	Prints the subtotal of the event, before tax and service charge has been added.
Tax	Prints the total tax of the event, and optionally prints the specific tax percentage (see "Showing Tax/Service Charge Percentage").
Gratuity	Prints the total gratuity (tip) of an event.
Service Charge	Prints the total service charge of the event and, as an option, prints the specific service charge percentage (see "Showing Tax/Service Charge Percentage").
Total Value	Prints the total amount the customer pays, including tax and service charge.
Paid	Prints the total amount paid for the event, and includes all payments received.
Balance	Prints the remaining balance of the event.
Total Cost	Prints the event's total cost to your company (as opposed to the total value the customer pays).
Per Guest	Prints the price per guest for the customer (divides either the subtotal or total by either the Planned, Guaranteed or Actual guest count, depending on your Global Settings).
Per Guest (Subtotal)	Prints the cost per guest automatically calculated by dividing the SUBTOTAL by the

Field	Description
	guest count.
Next Deposit	Prints the amount of the next deposit that is due for the event.
Due Date	Prints the date on which the next deposit is due.
Pay Method	Prints the method of payment for the event. This detail is entered on the Miscellaneous tab of the Event Manager's General display.
Card Type	Prints the credit card type on file for the event. *Note: This is entered in the Credit Card Information tool at the bottom of the Event Manager.*
Card Holder	Prints the name of the credit card holder on file for the event. *Note: This is entered in the Credit Card Information tool at the bottom of the Event Manager.*
Card Number/Card Number (Hidden)	Prints the last four digits of the credit card number on file for the event. *Note: This is entered in the Credit Card Information tool at the bottom of the Event Manager.*
Expires	Prints the expiration date of the credit card number on file for the event. *Note: This is entered in the Credit Card Information tool at the bottom of the Event Manager.*
Signature	Offers a blank space for a signature of the credit card holder.
None	This option leaves a particular area of the print blank. Choose this option if you do not want anything to appear on that area of the print.

Suppressing Billing Information

If you do not want any billing information at all to appear on your print (if, for example, you are creating a back-of-house print for your kitchen or setup staff), you can suppress this entire area.

1. On any print in your Print Designer, click into the checkbox labeled **Suppress Billing Information**, located to the right of the **Billing Information** section.
   Note: To identify a checkbox, float your mouse pointer over it prior to clicking.
   Result: With the checkbox checked, this area of the print will be suppressed.

2. Click into the checkboxes labeled **Suppress Financial Breakdown**, **Suppress Miscellaneous Charges/Discounts**, and **Suppress Deposit Due Schedule**.
   Result: The Billing Information section will not print.

Showing the Financial Breakdown

Each of your event prints can optionally show a breakdown of a party's finances — separating money based on the type of items ordered. Categories in this breakdown include Food, Beverage, Liquor, Equipment, Labor, Room, and Other fees. Subtotals, taxes, service charges, and totals will be printed for each category, as well as grand totals for the whole event.

1. On any print in your Print Designer, verify there is no check in the checkbox labeled **Suppress Financial Breakdown**, located beneath the **Suppress Billing Information** checkbox.
   Note: To identify a checkbox, float your mouse pointer over it.

	Food	Beverage	Liquor	Equipment	Labor	Room	Other	Total
Subtotal	$6,604.88	$127.22	$0.00	$70.00	$0.00	$100.00	$0.00	$6,902.10
Service Charge	$1,188.88	$22.90	$0.00	$9.00	$0.00	$18.00	$0.00	$1,238.78
Taxes	$544.91	$10.50	$0.00	$5.78	$0.00	$8.25	$0.00	$569.44
Total	$8,338.67	$160.62	$0.00	$84.78	$0.00	$126.25	$0.00	$8,710.32
						Paid		$2,000.00
						Balance		$6,710.32

2. Click into the checkbox to add or remove a check mark.
    Result: If the box is checked, the **Financial Breakdown** *section will not print; if there is no check mark, the* **Financial Breakdown** *section will appear on the print.*

Showing Tax/Service Charge Percentages

If you're showing billing information on a print, you are likely including totals for the tax and service charge of an event. Perhaps, in addition to these totals, you want to specify what the tax and service charge percentages are.

1. On any print in your Print Designer, click into the checkbox labeled **Show Tax & Service Charge Percentages**, located beneath the **Suppress Financial Breakdown** checkbox.
    Note: To identify a checkbox, float your mouse pointer over it prior to clicking.

2. Click into the checkbox to add or remove a check mark.
    Result: With the checkbox checked, this area of the print will be shown on the print; if there is no check mark, this section will not display on the print.

Subtotal	$3,971.00	Paid	$500.00	Pay Method	Credit Card	Card Number
Tax	$277.97	Balance	$4,345.77	Card Type		Expires
Service Charge	$596.80			Card Holder	
Total Value	$4,845.77			Signature	

Showing/Suppressing Miscellaneous Charges and Discounts

While most of the time an item needs to appear on the Food/Service tab in Event Manager to affect an event financially, there are a couple of exceptions to this rule, such as the Room Charge and Delivery Charge fields. If you have entered charges into either of these fields, they will affect the total charges of the event and will appear on your print in a special area for miscellaneous charges. Additionally, if you use the Event Discounts tool in Event Manager to discount an event, that information will appear in the same special print area. This area, as with most areas in your event prints, can optionally be suppressed. This option is not available on Print Layout 6, and is not available at all in the Express version of the program.

1. On any print in your Print Designer, click into the checkbox labeled **Suppress Miscellaneous Charges/Discounts**, located beneath the **Show Tax & Service Charge Percentages** checkbox.
    Note: To identify a checkbox, float your mouse pointer over it prior to clicking.

2. Click into the checkbox to add or remove a check mark.
    Result: With the checkbox checked, this area of the print will be suppressed (hidden); if there is no check mark, this section will appear on the print.

| | Discount per JP | ($289.50) |
| | Room Chg | $250.00 |

	Food	Beverage	Liquor	Equipment	Labor	Room	Other	Total
Subtotal	$2,605.50	$585.00	$0.00	$241.00	$0.00	$250.00	$0.00	$3,681.50
Service Charge	$416.88	$93.60	$0.00	$0.00	$0.00	$40.00	$0.00	$550.48
Taxes	$182.39	$40.95	$0.00	$16.87	$0.00	$17.50	$0.00	$257.71
Total	$3,204.77	$719.55	$0.00	$257.87	$0.00	$307.50	$0.00	$4,489.69

	Paid	$500.00
	Balance	$3,989.69

Showing Deposits Due

In addition to general financial information about an event, you may want the schedule of future deposits due for a party to display on your print. This section will list all deposits that have not yet been paid, i.e., those deposits that are due at some point in the future.

1. On any print in your Print Designer, verify the **Suppress Deposit Due Schedule** checkbox, located beneath the **Suppress Miscellaneous Charges/Discounts** checkbox, is not checked.
    Note: To identify a checkbox, float your mouse pointer over it prior to clicking.

2. Click into the checkbox to add or remove a check mark.
    Result: With the checkbox unchecked, this section will appear on the print.

Deposit Schedule

Due	Amount	Comment
12/24/2015	$1,922.88	100% of Remaining Balance
1/14/2016	$2,422.89	50% of Total Balance

Showing Payment Information on an Event Print

You may want to include information on your print about payments you have already received. Payments represent money you have received (whereas deposits, discussed in the next unit, represent money that will be due at some point in the future).

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.

2. Click the **Print Designer** button.
    Result: The Print Designer window opens.

3. Click on a title, such as **Contract**, from the prints panel on the left-hand side of your Print Designer.

4. Click into the section heading labeled **Payments Made** and optionally type a new heading as desired.

5. Verify the **Suppress Payments** checkbox, located to the right of the **Payments Made** section, is not checked.

6. Click the down arrow to the right of the first field, and select a field to appear (or select **None**).

7. Repeat Step 6 for other fields in the section.
   Result: With the checkbox unchecked, this section will appear on the print.

Payments Made						
Payment	Date	Method	Expires	Approval	Card Holder	Card Number
$500.00	8/21/2015	Credit Card	01-2019		John Smith	****** 2949

See the following table for a description of the available payment fields.

Available Payment Fields

Field	Description
Payment	Prints the payment amount for the event.
Pmt Date	Prints the date of each payment made for the event.
Pmt Method	Prints the method of each payment.
Pmt Card Type	Prints the credit card type, if applicable, used for each payment.
Pmt Card Number (Hidden)	Prints the last four digits of the credit card, if applicable, used for each payment.
Pmt Card Holder	Prints the name of the credit card holder, if applicable, for each payment.
Pmt Expires	Prints the expiration date of the credit card.
Pmt Approval	Prints the authorization details from the credit card company, if applicable.
Pmt Rev Code	Prints an optional revenue code you may have entered for each payment (often used for in-house tracking).
Pmt Acct Code	Prints an optional account code you may have entered for each payment (often used for in-house tracking or for interfaces with third-party accounting packages).
Pmt Check #	Prints the check number, if the payment type is Check.
Pmt Check Date	Prints the date the check was written, if the payment type is Check.
Pmt Category	Prints the payment category, e.g, Scheduled Payment.
None	Choose this option if you do not want anything to appear in one of these fields on the print.

Unit 5: Completing Your Custom Print

In this section, you will learn:

Customizing the Bottom Notes Section
Editing the Page Footer of a Print
Selecting a Language Translation
Customizing Languages
Adding a Custom Translation
Identifying the Print Type for the Program
Copying an Existing Print
Adding an Invoice
Creating Sub-Menus
Customizing the Invoice

Completing Your Custom Print

The "Top Notes" section of your prints allows you to type any free-flowing text, format the text any way you want, and even pepper the text with merge fields that will automatically pull information from a specific event when you generate the print. The "Bottom Notes" section can also be customized. While Bottom Notes can contain any text you want, this section is most often used to outline your company's terms and conditions and provide signature lines.

Customizing the Bottom Notes Section

1. Click the **Edit Bottom Notes** button, located on the lower left-hand side of the Print Designer.
   Result: *The Bottom Notes window opens.*

2. Type into the text box as desired, optionally inserting merge fields.

3. Format text using the **Format** toolbar located at the top left-hand side of the of the window.

4. **[Optional]** Add signature lines by typing a label for the line (such as "Customer Signature") and then typing several underscore characters ("_").
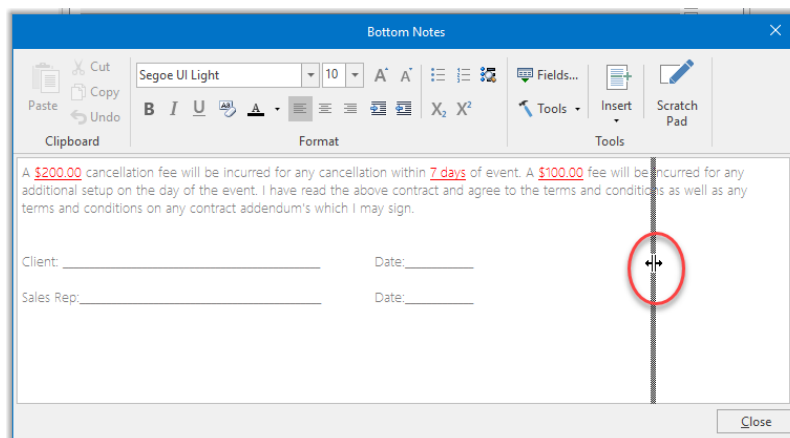
Editing the Page Footer of a Print

Caterease gives you the opportunity to insert a unique footer onto your event prints and to change the material at any time. You might want to add more information to this footer, such as your company's address, phone number, website, etc. This text can be entered and formatted in the Footer section of the Print Designer.

1. Click the **Edit Footer** button (lower left-hand side of the Print Designer).
   Result: *The Footer window opens.*

2. Type into text box as desired, optionally inserting merge fields.

3. Format text using the **Format** toolbar located at the top left-hand side of the window.
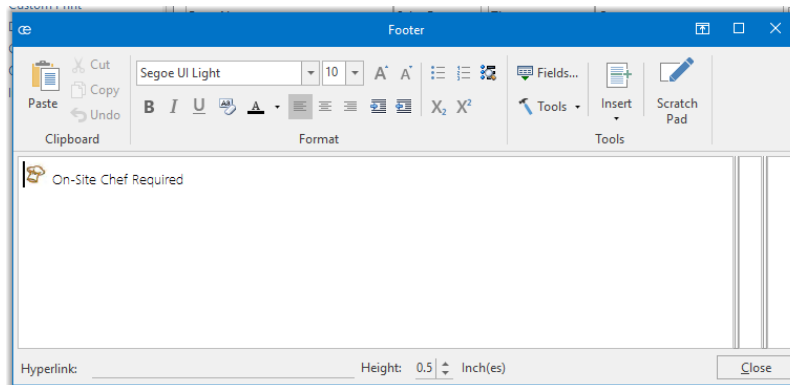
Customizing Languages

1. Close your Print Designer, if it is open.

2. Click the **Administration** ribbon tab, and then choose **Options** > **Language Translations**.

3. Click in any language column and enter a translation for the corresponding default term in the **Root** column.
   Note: *You can use the column labeled **English** to enter alternatives to the Root captions. For example, if you would prefer your prints to use the term "Company Name" instead of the default "Client/Organization," you can enter that alternative into the **English** column.*

4. Repeat step 3 as desired.

Language Translations

Root	English	Spanish	French	German	Italian	Portuguese	Custom
Account #	Account #	# de cuenta	Compte #	Kontozahl	Número da conta	Número da conta	
Acct Code	Acct Code	Clave de cuenta	Code de compte	Kontocode	Código da conta	Código da conta	
Act	Act	Acto					
Act Guests	Act Guests	Invitados reales	Couverts servis	eigentliche Gäste	Convidados presentes	Convidados presentes	
Address	City, St Zip	Dirección	Adresse	Adresse	Endereço	Endereço	
Adjusted	Adjusted	la Adjusted			Ajustado	Ajustado	
Adults	Members						
Agreed	Agreed	la Agreed			Acordado	Acordado	
Approval	Approval	Aprobación	Approuve	Zustimmung	Aprovação	Aprovação	
Arrival	Arrival	Llegada	Arrivée	Ankunft	Chegada	Chegada	
at a flat rate of	at a flat rate of	En una tarifa uniforme de					
at an hourly rate of	at an hourly rate of	En una tarifa horaria de					
Balance	Balance	Balance	Balance	balancieren	equilibrio		
Beverage	Beverage	Bebida	Boisson	Getränk	Bebidas	Bebidas	
Billing Address	Billing Address	Dirección facturada	Adresse a facturer	Adresse berechnet	Endereço de cobrança	Endereço de cobrança	
Billing Client	Billing Client	Cliente facturado	Client a facturer	Kunde berechnet	Cliente de cobrança	Cliente de cobrança	
Blocked	Blocked	Bloqueado			Bloqueado	Bloqueado	
Booked	Booked	Reservar on	Reserve le	Reserviert auf	Reservado	Reservado	
Booking Cell	Booking Cell	Celular de Reservación					
Booking Contact	Booking Contact	Responsable de la reserva	reserve par	zuverlässig für Reservierun	Contato de reserva	Contato de reserva	
Booking Email	Booking Email	Email de Reservación					
Booking Fax	Booking Fax	Fax de Reservación					
Booking Tel	Booking Tel	Telefono de Reservación					
Card Holder	Card Holder	Titular de tarjeta	Titulaire	Kartehalter	Nome do cartão	Nome do cartão	
Card Number	Card Number	Número de tarjeta	Numero	Kartennummer	Número do cartão	Número do cartão	
Card Type	Card Type	Tipo de la tarjeta	Type de carte	Karteart	Tipo de cartão	Tipo de cartão	
Category	Location	Categoría	Categorie	Kategorie	Categoria	Categoria	
Cellular	Cellular	Cellulaire	Celular				

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Adding a Custom Translation

1. If a desired option is not available (Russian, Chinese, Japanese, etc.), access the Customize Names window (**Administration** ribbon tab > **General** > **Customize Names** > **Miscellaneous**) and type the desired language name into the Custom Translation field.

2. Next, access the Language Translations window (**Administration** > **Options** > **Language Translations**) and type in the translations for your new custom option.

Identifying the Print Type for the Program

You may want Caterease to automatically keep track of the dates on which you generate your various event prints. For example, if you print a contract for a customer today, you might want Caterease to record the current date so later on you can find out exactly when that contract was sent. However, since Caterease allows you to create all of your custom prints, it has no way of knowing which one you consider your "Contract," which one is your "Invoice," which one is your "BEO" (Banquet Event Order), etc.Therefore, if you want Caterease to keep track of the dates on which you generate your prints, you should identify those prints to the program.

Identifying the Print Type for the Program

1. Click on the title of the print you want to identify on the left-hand side of the Print Designer screen.

2. Choose the appropriate print type for this print: Contract, Invoice, or BEO.
   *Note: Choose **None** if this print is none of the above.*

> **Tip:** *Once you have identified the Print Type of each print, you should go into* ***Administration > Settings > Global Settings*** *and click the* ***Managers*** *tab to verify that the* ***Automatically Set Print Date*** *option is checked off.*

Copying an Existing Print

Imagine you spend a great deal of time creating your perfect custom contract, showing just the information you need the customer to see. Then you remember you need to create the same print for your customers who have off-premise parties, rather than parties in your banquet rooms. And perhaps you even need a unique print for your wedding receptions, with slightly different terms and conditions. Rather than having to re-create the same print three times, with slight modifications, you can copy a print (Professional version only) and then quickly make the necessary changes.

Copying an Existing Print in Print Designer or Miscellaneous Print Designer

1. Click your right mouse button over any print title on the left-hand side of your Print Designer screen.
   Result: *A pop-up menu opens.*

2. Choose **Copy Print**.
   ***Result:** A confirmation message appears.*

3. Click **Yes** to confirm.
   ***Result:** A new print (an exact duplicate of the original) is added, with your cursor positioned in the title.*

4. Type a title for your new print, and then press **[Enter]**.

5. Edit the new print as desired.

Creating a Custom Invoice

The Invoice print in Caterease differs from other event prints, in that it has one layout that you can manipulate. As a default, the Invoice only shows food/service items that have a value (meaning they have both a price and a quantity in the event), although you can easily customize the layout to meet your needs. "See Customizing the Invoice."

Adding an Invoice

1. Click the **Add Print** button , located at the top of the Print Designer window.
   ***Result:** A confirmation message displays.*

2. Click **Yes** to confirm your choice.
   ***Result:** The Select Print Layout window displays.*

3. Click into the **Add A New Print** checkbox.

4. Select **Layout 1** under **Invoices**.

5. Click **OK**.
   ***Result:** A new print is added, and your cursor is positioned in the Title field of

Tip: *You can also use Headers and create a sub-menu. See the topic below.*

the new print.

6. Type a title for your new print.
   Note: *This is the title that will appear in your **Prints** drop-down menu (i.e., the title you will select to gen-erate this print).*

7. Press **[Enter]** when finished to save your changes.

Creating Sub-Menus

1. Click the **Add Print** button ⊕, located on the top left-hand side of the Print Designer/Miscellaneous Print Designer window.
   Result: *A confirmation prompt appears.*
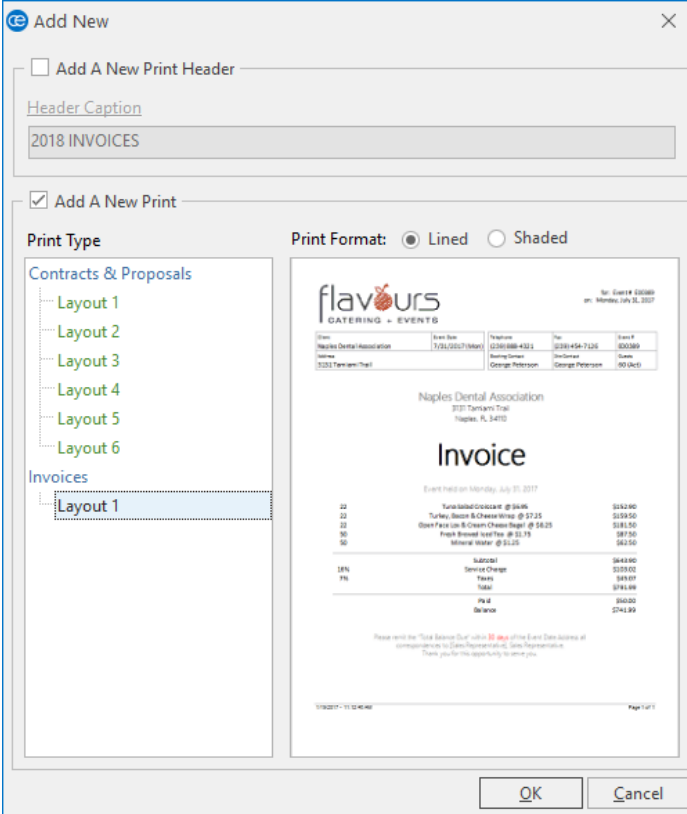
2. Click **Yes** to confirm.
   Result: *The Add New window opens.*

3. To add a new print title, click into the **Add a New Print Header** checkbox.

4. Type the Header Caption into the field provided.

5. Click **OK**.

Customizing the Invoice

Most of the design features of the Invoice are the same as other prints discussed in this book. However, there are two unique options: First, you can decide whether you want the financial totals on the Invoice to be centered on the print or if you want separate Food, Beverage, Liquor, Equipment, Room, Labor, and Other charges to appear in boxes. Second, you can decide whether or not to include menu items without values (meaning they either have no prices or no quantities).

1. Click either the **Centered** or **Boxed** radio button, located towards the middle, along the right-hand side of the Invoice in your Print Designer screen.
    *Note: It is common, when using Boxed layout, to click the **Suppress Details** checkbox along the right-hand side of the print and suppress individual menu items, whereas these details are not typically suppressed in a Centered layout.*

2. **[Optional]** Click into the **Include Items Without Values** checkbox on the right-hand side of the Print Designer screen to have menu items with no values (either no prices or no quantities) appear on the Invoice.
    Note: When this checkbox is checked, these items will appear on the print; when the box is not checked, these items will not appear.

3. **[Optional]** Click into the **Display Extended Tax Breakdown** checkbox on the left-hand side of the Print Designer screen to show a breakdown of each of your three custom tax rates separately.

4. Indicate this print is an Invoice by clicking **Invoice** from the **Print Type** box at the bottom right-hand side of your screen.

Unit 6: Editing Miscellaneous Prints

In this section, you will learn:

Customizing and Suppressing General Information (All Prints)
Editing the Header (All Prints)
Editing Top Notes Sections (All Prints)
Changing Print Fonts (All Prints)
Customizing the Menu Section (Fancy Menu, Production Sheet)
Selecting Required Item Details (Required Item List Print)
Grouping Required Item Details (Required Item List Print)
Setting Special Print Options (Production Sheet, Vendor List)

Editing Miscellaneous Prints

The Miscellaneous Prints Designer allows you to redesign the tops of various prints, including the Billing Statement in Account Manager and all sub-prints in Event Manager and Menu Manager.

Customizing and Suppressing General Information (All Prints)

1. In the Miscellaneous Print Designer window (**Setup** > **Miscellaneous Prints Designer**), click the down arrow to the right of any field in a print to choose a different detail to appear there.
   Note: In addition to general event details, the "Deliveries," "Details," and "Staffing" prints allow you to rearrange or remove site location information, venue, and time details, as well.

2. Choose to suppress various sections of the print by clicking into the corresponding checkbox, located along the right-hand side of the Miscellaneous Print Designer window, next to a specific section of a print.
   Note: Float your mouse pointer over any checkbox for a tool tip identifying its corresponding section; a check in a box generally causes a section to be suppressed on the print.

3. **[Optional]** Click into the "heading" box of any section and type a different heading, if desired.

Editing the Header of a Print (All Prints)

1. In the Miscellaneous Print Designer, click the **Edit Header** (top right) or **Edit Footer** (bottom left) button.
   Result: The Header or Footer window opens, with three panes to optionally separate information.

2. **[Optional]** Stretch or shrink any pane by holding your left mouse button down on the inside frame and dragging left or right.
   *Note: You can also set all three panes to equal widths by clicking the **Tools** button at the top of the Header/Footer window and choosing **Set Equal Widths**.*

3. Click into any pane and type as desired, using the toolbar at the top of the window to format text, center, or right-justify, etc.

4. **[Optional]** Insert images (logos, pictures, etc.), by clicking the **Insert** button at the top of the window and choosing **Image**, then browsing to the image you want to insert.
   *Note: Images can be placed into any pane in the Header, and can be justified (left, center, right) just like text. Previously placed images can be saved to your hard drive by right-clicking and choosing **Save to File**.*

5. **[Optional]** Insert merge fields (to dynamically merge information from the event, such as the event number, revised date, etc.), by clicking the **Fields** button [⊞], located at the top of the window, expanding a category of fields, then double-clicking a specific field.

6. **[Optional]** Click in the Hyperlink field at the bottom of the Header window and enter a URL (web address) to attach to this areas of the print.
   Note: When you e-mail this print, the recipient can click any part of this header and be sent to the designated web address.

Editing Top Notes Sections (All Prints)

1. In the Miscellaneous Print Designer, click the **Edit Top Notes** button.
   Result: The text block for that section appears.
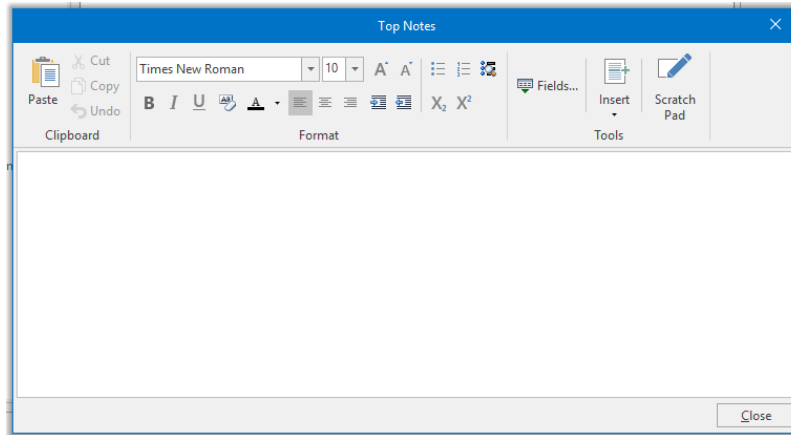
2. Click into the text box and type as desired, using the toolbar at the top of the window to format text, center, or right-justify, etc.

3. **[Optional]** Insert images (logos, etc.) by clicking the **Insert** button at the top of the window and choosing **Image**, then browsing to the image you want to insert.
   Note: Images can be justified (left, center, right) just like text.

4. **[Optional]** Insert merge fields (to dynamically merge information from the event, such as the event

   number, revised date, etc.), by clicking the **Fields** button [image], located at the top of the window, opening a category of fields, and then double-clicking a specific field.

Changing Print Fonts (All Prints)

1. Click the **Tools** button at the top of the Miscellaneous Print Designer window and choose **Print Fonts**.
   Result: *The Fonts window opens.*
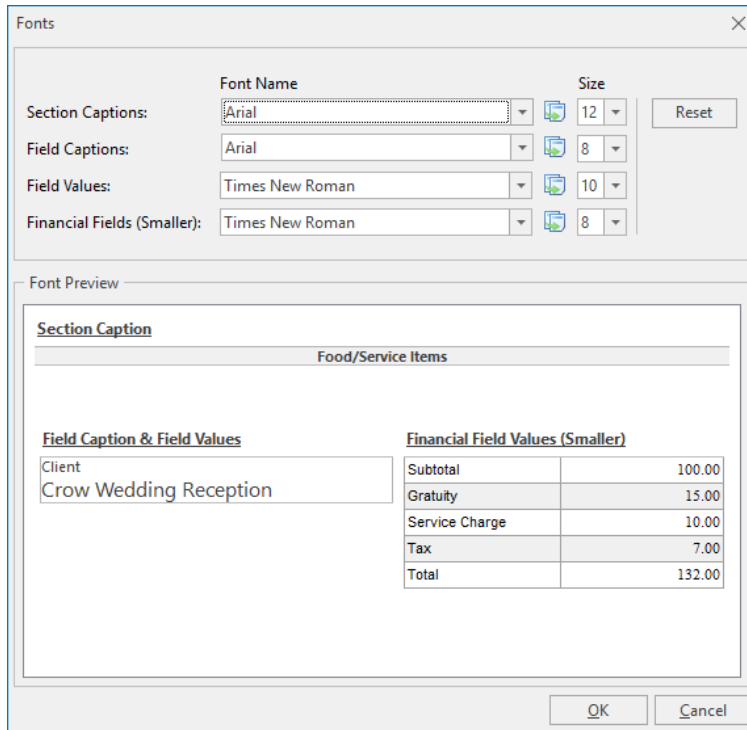
2. Choose a different font style and/or size for various areas of the print.
   Note: The preview at the bottom of the window will update to reflect your changes.

3. When finished, click **OK**.
   Result: The Font window changes, but the preview in Miscellaneous Print Designer will NOT reflect your new font selections.
   *Note: To review your new fonts, save the print and click the **Preview** button at the top of the Miscellaneous Print Designer window. (You must have an event open in Event Manager to preview a print.)*

Customizing the Menu Section (Production Sheet, Fancy Menu)

1. In the Production Sheet or Fancy Menu print, locate the menu section in the middle of the print.
   *Note: The "Fancy Menu" print only offers one column next to **Format**.*
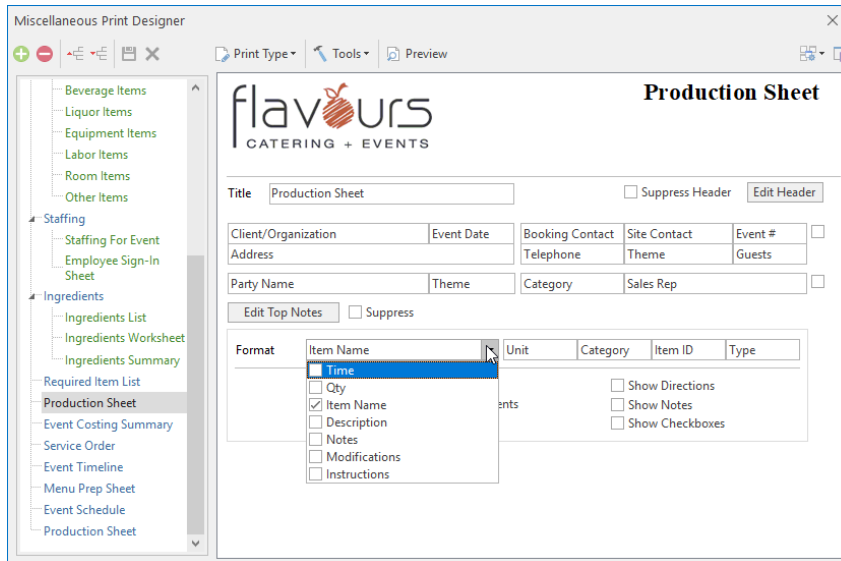
2. Click the down arrow in the first column next to **Format** and click the checkbox next to each item detail you want to include on this print:

- **Item Name**
  Shows the name of each item (as opposed to its detailed description) in whatever font is chosen for this print.

- **Time**
  Shows the time for each menu item to the left of that item; times can be assigned in the menu of an event.
  Note: Time can also be displayed in a separate column to the right of the items, or can be used to group items (see below).

- **Qty**
  Shows the quantity of each item, between parentheses, to the left of each item.
  Note: Quantity can also be displayed in a separate column to the right of the items.

- **Description**
  Shows the detailed description of each item, with whatever font formatting has been applied in the event.

- **Notes**
  Shows the notes of each item, with whatever font formatting has been applied in the event.

- **Modifications**
  Displays any text typed into the **Modifications** tab for the item in the event - including font formatting - in a colored box for easier reference; used especially in back-of-house prints to highlight changes to items.

- **Instructions**
  Shows the recipe preparation for each item in the event.

3. Click the down arrows in other columns across the menu section to choose other details to appear, including item quantity, price, total, as well as details such as prep area, category, etc.
   Note: "Fancy Menu" print does not offer these options.

4. **[Optional]** In the "Fancy Menu" print, alternately click into the checkbox next to the menu section to allow or not allow this print to honor "menu item hiding."
   Note: A check in the box means item hiding will be allowed (meaning any item designated as "hidden" in an event's menu will not appear). Removing this check is a technique to pass otherwise "hidden" information to your back-of-house staff.

5. **[Optional]** In the Fancy Menu print, click into the **Center Items** checkbox if you would like the details to be centered on the print.

Selecting Required Item Details (Required Item List Print)

1. In the Required Item List print, locate the item details section in the middle of the print.
   Note: This section is the bottom row of boxes that you can edit, consisting of five boxes.

2. Click the down arrows next to each box in this section and choose which specific item details to include on this print:
   Note: The options below can be displayed in any of the boxes in this section.

   - **Item Name**
     Shows the name/description of each required item for the event.

   - **Category**
     Shows the category of each item (a custom quickpick list used to track items).

- **Comment**
  Shows any custom comment that was typed in for each item.

- **Vendor**
  Shows the vendor associated with each item (a custom list established through the **Setup** sidebar group).

- **Food/Service Item**
  Shows the menu item each required item is associated with.

- **Item Unit**
  Shows the item unit, or unit in which the ingredients were purchased.

- **Packing Unit**
  Shows the packing unit (cases, boxes, crates, etc.), you are using.

- **None**
  Leaves this box blank.

Grouping Required Item Details (Ingredients List)

1. In the Ingredients List (**Ingredients** > **Ingredients List**) or Required Items List print, locate the **Group By** section toward the bottom of the window.
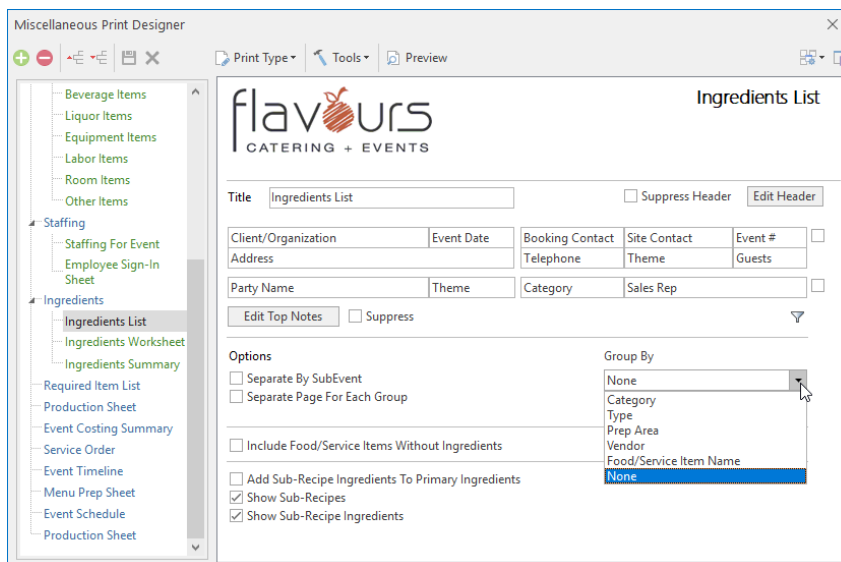
2. Click the down arrow under **Group By** to separate items on the print based on their "Category," "Vendor," etc.

Setting Special Print Options (Production Sheet, Vendor List)

1. In the left pane of the Miscellaneous Print Designer window, select the **Production Sheet** or **Vendor**

List.

2. At the bottom of the main pain of the window, click into the checkboxes of each option you would like to enable:

- **New Page for Each Prep Area/Vendor**
    Lists items on the print on separate pages according to prep area or vendor.

- **Show Food/Service Item Comments**
    Includes any text typed into the Comment field for each menu item.

- **Show Directions**
    Includes any text typed into the site location "Directions" box from the event.

- **Show Notes**
    Displays any notes that were added to the tab.

- **Show Checkboxes (Production Sheet Only)**
    Shows two checkboxes to the left of each item on the print for use by production personnel.

- **Exclude Unassigned Vendors (Vendor List Only)**
    Excludes any menu items from the print that do not have vendors assigned to them.

Unit 7: Print Designer Layouts

**Contract Print
Layout Samples Shown:**

Layout 1

Layout 2

Layout 3

Layout 4

Layout 5

Layout 6

Layout 1
General event information appears in boxes at the top, and all details of each sub-event - venue, times, menu and comments - are separated into individual boxes.

flavours
CATERING + EVENTS

Layout 1 (Shaded)

Client	Event Date	Telephone	Fax	Event #
Ladtech	3/9/2018 (Fri)	(612) 415-1252	(612) 415-1090	E00454

Address		Booking Contact	Site Contact	Guests
6100 Pine Ridge Road		Bill Depisa	Bill Depisa	30 (Pln)

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Lunch Buffet	On-Premise	12:00 pm	1:00 pm	12:00 pm	Sand	Banquet

Food/Service Items

Food/Service Items	Price	Qty	Total
All-American Buffet	$10.25	30	$307.50
Soft Drinks	$1.25	27	$33.75

Comments

Group to move to sand room for meeting following lunch.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Meeting	On-Premise	1:00 pm	4:00 pm	NA	Sand	Classroom

Food/Service Items

Food/Service Items	Price	Qty	Total
Wireless Microphone	$70.00	1	$70.00
Flip Chart with Markers	$20.00	1	$20.00
Projection Screen	$10.00	1	$10.00

Comments

Client will arrive an hour early with projector for setup.

Subtotal	$441.25	Paid	$0.00	Pay Method	Credit Card	Card Number	*** 4352
Tax	$30.89	Balance	$526.74	Card Type	Visa	Expires	03-2023
Service Charge	$54.60			Card Holder	Bill Depisa		
Total Value	$526.74			Signature			

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____   Date:_____

Sales Rep:_____   Date:_____

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Layout 1 - Lined
All layouts are available in both a "shaded" format (shown on previous page), as well as a "lined" format (shown below).

flavours
CATERING + EVENTS

Layout 1 (Lined)

Client		Event Date	Telephone	Fax	Event #
Ladtech		3/9/2018 (Fri)	(612) 415-1252	(612) 415-1090	E00454
Address			Booking Contact	Site Contact	Guests
6100 Pine Ridge Road			Bill Depisa	Bill Depisa	30 (Pln)

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Lunch Buffet	On-Premise	12:00 pm	1:00 pm	12:00 pm	Sand	Banquet

Food/Service Items

Food/Service Items	Price	Qty	Total
All-American Buffet	$10.25	30	$307.50
Soft Drinks	$1.25	27	$33.75

Comments

Group to move to sand room for meeting following lunch.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Meeting	On-Premise	1:00 pm	4:00 pm	NA	Sand	Classroom

Food/Service Items

Food/Service Items	Price	Qty	Total
Wireless Microphone	$70.00	1	$70.00
Flip Chart with Markers	$20.00	1	$20.00
Projection Screen	$10.00	1	$10.00

Comments

Client will arrive an hour early with projector for setup.

Subtotal	$441.25	Paid	$0.00	Pay Method	Credit Card	Card Number	*** 4352
Tax	$30.89	Balance	$526.74	Card Type	Visa	Expires	03-2023
Service Charge	$54.60			Card Holder	Bill Depisa		
Total Value	$526.74			Signature			

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____   Date:_____

Sales Rep:_____   Date:_____

Layout 2
**General event information appears two columns at the top, as opposed to in boxes as with other layouts.
All sub-event details are listed underneath, grouped by type of detail (venue details, menu items, etc.).**

flavours
CATERING + EVENTS

Layout 2 (Lined)

Client	Ladtech	Event Date	3/9/2018 (Fri)
Party Name	Quarterly Sales Meeting	Event #	E00454
Address	6100 Pine Ridge Road	Guests	30 (Pln)
Telephone	(612) 415-1252	Booking Contact	Bill Depisa
Fax	(612) 415-1090	Site Contact	Bill Depisa
Sales Rep	Kathy Wilson	Theme	Meeting

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Lunch Buffet	On-Premise	12:00 pm	1:00 pm	12:00 pm	Sand	Banquet
Meeting	On-Premise	1:00 pm	4:00 pm	NA	Sand	Classroom

Food/Service Items

Food/Service Items	Price	Qty	Total
Lunch Buffet – 3/9/2018 – 12:00 pm			
All-American Buffet	$10.25	30	$307.50
Soft Drinks	$1.25	27	$33.75
Meeting – 3/9/2018 – 1:00 pm			
Wireless Microphone	$70.00	1	$70.00
Flip Chart with Markers	$20.00	1	$20.00
Projection Screen	$10.00	1	$10.00

Comments

Lunch Buffet – 3/9/2018 – 12:00 pm
Group to move to sand room for meeting following lunch.

Meeting – 3/9/2018 – 1:00 pm
Client will arrive an hour early with projector for setup.

Subtotal	$441.25	Paid	$0.00	Pay Method	Credit Card	Card Number	*** 4352
Tax	$30.89	Balance	$526.74	Card Type	Visa	Expires	03-2023
Service Charge	$54.60			Card Holder	Bill Depisa		
Total Value	$526.74			Signature			

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____   Date:_____

Sales Rep:_____   Date:_____

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Layout 3
Menu item details are separated into two sections on the left and right side of the print, based on custom conditions that you can establish.

flavours
CATERING + EVENTS

Layout 3 (Lined)

Client	Event Date	Telephone	Fax	Event #
Ladtech	3/9/2018 (Fri)	(612) 415-1252	(612) 415-1090	E00454

Address		Booking Contact	Site Contact	Guests
6100 Pine Ridge Road		Bill Depisa	Bill Depisa	30 (Pln)

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Lunch Buffet	On-Premise	12:00 pm	1:00 pm	12:00 pm	Sand	Banquet
Meeting	On-Premise	1:00 pm	4:00 pm	NA	Sand	Classroom

Food & Beverage				Equipment/Miscellaneous			
Food/Service Items	Price	Qty	Total	Food/Service Items	Price	Qty	Total
Lunch Buffet - 3/9/2018 - 12:00 pm				**Meeting - 3/9/2018 - 1:00 pm**			
All-American Buffet	$10.25	30	$307.50	Wireless Microphone	$70.00	1	$70.00
Soft Drinks	$1.25	27	$33.75	Flip Chart with Markers	$20.00	1	$20.00
				Projection Screen	$10.00	1	$10.00

Comments

Lunch Buffet - 3/9/2018 - 12:00 pm

Group to move to sand room for meeting following lunch.

Meeting - 3/9/2018 - 1:00 pm

Client will arrive an hour early with projector for setup.

Subtotal	$441.25	Paid	$0.00	Pay Method	Credit Card	Card Number	*** 4352
Tax	$30.89	Balance	$526.74	Card Type	Visa	Expires	03-2023
Service Charge	$54.60			Card Holder	Bill Depisa		
Total Value	$526.74			Signature			

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____ Date:_____

Sales Rep:_____ Date:_____

Layout 4
General event information appears in boxes at the top - and all sub-event details are listed underneath, grouped by type of detail (venue details, menu items, etc.).

flavours CATERING + EVENTS

Layout 4 (Lined)

Client	Event Date	Telephone	Fax	Event #
Ladtech	3/9/2018 (Fri)	(612) 415-1252	(612) 415-1090	E00454

Address		Booking Contact	Site Contact	Guests
6100 Pine Ridge Road		Bill Depisa	Bill Depisa	30 (Pln)

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Venue

Description	Type	Start	End	Serving	Room	Setup Style
Lunch Buffet	On-Premise	12:00 pm	1:00 pm	12:00 pm	Sand	Banquet
Meeting	On-Premise	1:00 pm	4:00 pm	NA	Sand	Classroom

Food/Service Items

Food/Service Items	Price	Qty	Total
Lunch Buffet - 3/9/2018 - 12:00 pm			
All-American Buffet	$10.25	30	$307.50
Soft Drinks	$1.25	27	$33.75
Meeting - 3/9/2018 - 1:00 pm			
Wireless Microphone	$70.00	1	$70.00
Flip Chart with Markers	$20.00	1	$20.00
Projection Screen	$10.00	1	$10.00

Comments

Lunch Buffet - 3/9/2018 - 12:00 pm
Group to move to sand room for meeting following lunch.

Meeting - 3/9/2018 - 1:00 pm
Client will arrive an hour early with projector for setup.

Subtotal	$441.25	Paid	$0.00	Pay Method	Credit Card	Card Number	*** 4352
Tax	$30.89	Balance	$526.74	Card Type	Visa	Expires	03-2023
Service Charge	$54.60			Card Holder	Bill Depisa		
Total Value	$526.74			Signature			

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____   Date:_____

Sales Rep:_____   Date:_____

Layout 5 (Lined)

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Client		Event Date		Telephone	Fax		Event #
Ladtech		3/9/2018 (Fri)		(612) 415-1252	(612) 415-1090		E00454
Address				Booking Contact	Site Contact		Guests
6100 Pine Ridge Road				Bill Depisa	Bill Depisa		30 (Pln)

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Food & Beverage				Equipment/Miscellaneous			
Food/Service Items	Price	Qty	Total	Food/Service Items	Price	Qty	Total
Lunch Buffet - 3/9/2018 - 12:00 pm				**Meeting - 3/9/2018 - 1:00 pm**			
All-American Buffet	$10.25	30	$307.50	Wireless Microphone	$70.00	1	$70.00
Soft Drinks	$1.25	27	$33.75	Flip Chart with Markers	$20.00	1	$20.00
				Projection Screen	$10.00	1	$10.00

Comments	Venue				
Lunch Buffet - 3/9/2018 - 12:00 pm	Room	Setup Style	Type	Start	End
Group to move to sand room for meeting following lunch.	Sand	Banquet	On-Premise	12:00 pm	1:00 pm
	Sand	Classroom	On-Premise	1:00 pm	4:00 pm
Meeting - 3/9/2018 - 1:00 pm					
Client will arrive an hour early with projector for setup.					

Subtotal	$441.25	Paid	$0.00	Pay Method	Credit Card	Card Number	*** 4352
Tax	$30.89	Balance	$526.74	Card Type	Visa	Expires	03-2023
Service Charge	$54.60			Card Holder	Bill Depisa		
Total Value	$526.74			Signature			

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____   Date:_____

Sales Rep:_____   Date:_____

Layout 6
Menu item details are separated on the left and right side of the print based on custom conditions, with Comments, Venue details, Terms/Conditions and Financial Information on the left and right below that.

flavours
CATERING + EVENTS

Layout 6 (Lined)

Client	Event Date		Telephone	Fax	Event #
Ladtech	3/9/2018 (Fri)		(612) 415-1252	(612) 415-1090	E00454
Address			Booking Contact	Site Contact	Guests
6100 Pine Ridge Road			Bill Depisa	Bill Depisa	30 (Pln)

Pricing based on the minimum guaranteed guest count of 27. Estimated cost per guest is $13.99. Any changes to the guaranteed guest count must be made no later than 72 hours before the event date/time. Cancellation charges may apply.

Food & Beverage				Equipment/Miscellaneous			
Food/Service Items	Price	Qty	Total	Food/Service Items	Price	Qty	Total
Lunch Buffet - 3/9/2018 - 12:00 pm				**Meeting - 3/9/2018 - 1:00 pm**			
All-American Buffet	$10.25	30	$307.50	Wireless Microphone	$70.00	1	$70.00
Soft Drinks	$1.25	27	$33.75	Flip Chart with Markers	$20.00	1	$20.00
				Projection Screen	$10.00	1	$10.00

Comments	Venue

Lunch Buffet - 3/9/2018 - 12:00 pm

Group to move to sand room for meeting following lunch.

Meeting - 3/9/2018 - 1:00 pm

Client will arrive an hour early with projector for setup.

Room	Setup Style	Type	Start	End
Sand	Banquet	On-Premise	12:00 pm	1:00 pm
Sand	Classroom	On-Premise	1:00 pm	4:00 pm

Terms & Conditions

A $200.00 cancellation fee will be incurred for any cancellation within 7 days of event. I have read the above contract and agree to the terms and conditions as well as any terms and conditions on any contract addendum's which I may sign.

Client: _____

Sales Rep:_____

Financial Information

Subtotal	$441.25	Paid	$0.00
Tax	$30.89	Balance	$526.74
Service Charge	$54.60		
Total Value	$526.74		

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CATEREASE

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