

TRAINING GUIDE



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Customizing Your Food/Service Items in Menu Manager

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Unit 1: Setting up Default Menus

In this section, you will learn:

- Setting Up Food/Service Types
- Accessing Food/Service Item Type Tabs from Event Manager
 - Setting Event Tax Rates
- Adding a New Menu or Sub-Menu
 - Copying an Existing Menu
- Adding Food/Service Items to Default Menus
- Creating a Description/Recipe/Label/Notes/Image for an Item
 - Editing Additional Food/Service Item Details
- Assigning a Prep Area for a New Food/Service Item
- Generating a Production Sheet for an Event Order
 - Fields Available in the Food/Service Items Grid
- Establishing a Category for a New Food/Service Item
 - Creating an Inventory for Reusable Items
- Establishing Minimum, Default, and Linked Quantities
 - Establishing Default Base Price Markup Rates
- Adding a Quickpick Item

Unit 1: Setting up Default Menus

Setting Up Food/Service Item Types

You can establish up to eight food/service item types. Types are used in all financial calculations, and each of these types can be renamed and rearranged to suit your preferences. Your prints and reports reflect the types you establish and the order in which you arrange them.

Setting Up Food/Service Item Types

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **General > Food/Service Item Types**.
Result: The Food/Service Item Types window opens.
3. To add a new Food/Service Item Type, click into the Type field and type the new name over "NA."
Note: You can rename an existing field by clicking into a Type field, highlighting the existing name and typing a new name.
4. Click the down arrow to the right of the Image field and select an image from the drop-down list.
5. Click into the checkbox under the Active field to activate the new Food/Service Type.
Note: Removing the checkbox from the Active field makes the Food/Service Type inactive, meaning the inactive field will not be an option on the Sub-Event display of Event Manager.
6. Click into the **Associate Charges** area to associate a Room, Labor, Delivery or Misc (Miscellaneous) charge to the Item Type.
7. **[Optional]** To rearrange the order of your Food/Service Types, click into a Type or Image field and hold down your left mouse button. Then simply move the fields up or down into the desired location.
Note: Click the **Reset** button at the top right-hand side of the window to restore the default settings.


Food/Service Item Types			Associate Charges			
Type	Image	Active	Room	Labor	Delivery	Misc
Food		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beverage		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Liquor		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labor		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Room		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Accessing Food/Service Item Type Tabs from Event Manager

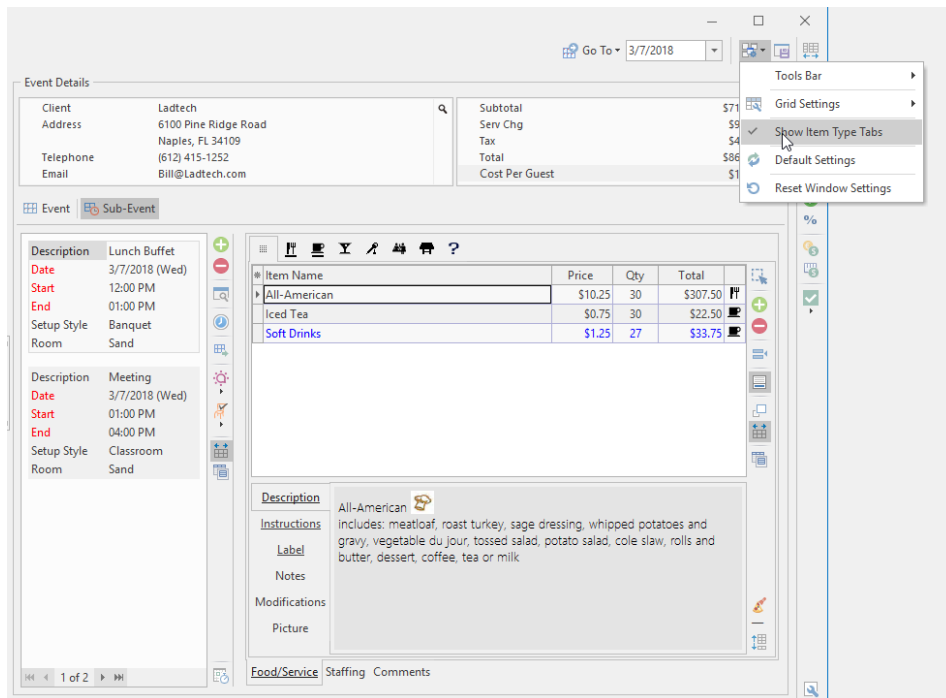
1. In Event Manager, access the **Food/Service** tab on the **Sub-Event** screen.

Note: You must be in the Sub-Event area to view Item Type Tabs.

2. Click the **Settings** button , located on the upper right-hand side of the window, and select **Show Item Type Tabs**.

Result: A series of tabs, one for each established item type, displays at the top of the window (although you may change the alignment to bottom, right, or left).

3. **[Optional]** From the All Items view (the default view) click on the Food Items tab to view types that have been designated Food.
4. **[Optional]** Click on the other tabs (Beverage Items; Liquor Items; Equipment Items; Labor Items; Room Items; Other Items) to filter each item separately.



5. Click the **Save Current Window Settings** button , located at the upper right-hand side of the window, if you would like to retain this alternative view as your default.

Establishing Default Tax Rates

You can easily establish or edit the default tax, service charge, and gratuity rates for all new events booked in the program. In addition, you can create multiple tax schedules and assign them to individual customers or site locations used for an event.

Note: Any changes to default tax/service charge rates affect events booked in the future; events currently in the program will not be automatically affected.

Setting Tax/Service Charge Rates

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click **General > Tax/Service Charge Rates**.

Result: The Default Tax & Service Charge Rates window opens.

Default Tax & Service Charge Rates

→ Tax Schedules

By Food/Service Item Type Enter As Percentage (10.250 = 10.25%)

	First	Second	Third	Gratuity	<input type="checkbox"/> Tax Grat <input type="checkbox"/> At New Rate	Serv Chg	<input type="checkbox"/> Tax Serv Chg <input type="checkbox"/> At New Rate
Food	7	0	0	0	<input type="checkbox"/>	16	0
Beverage	7	0	0	0	<input type="checkbox"/>	16	0
Liquor	7	0	0	0	<input type="checkbox"/>	16	0
Equipment	7	0	0	0	<input type="checkbox"/>	16	0
Labor	7	0	0	0	<input type="checkbox"/>	16	0
Room	7	0	0	0	<input type="checkbox"/>	16	0
Other	7	0	0	0	<input type="checkbox"/>	16	0
NA	0	0	0	0	<input type="checkbox"/>	0	0

Tax Exempt

☐ Tax Exempt

Exempt #'

Expires

Additional Adjustments

	Amount	Item Codes
Subtotal	\$0.00	
First	\$0.00	
Second	\$0.00	
Third	\$0.00	
Gratuity	\$0.00	
Service Charge	\$0.00	

OK Cancel

3. Enter a new tax rate for your **Food** items by typing numbers into the Food field as desired.
Note: The up-and-down arrows next to the rate adjust it one-hundredth (.01) of a percent.
4. Press your **[Enter]** key to move to the next field (the Beverage field).

5. Continue to enter default tax rates as desired for all food/service item types.
***Note:** Individual menu items can be designated as exempt from tax, service charge, and/or gratuity in Menu Manager. For example, even if you establish a default tax rate for "Equipment" items here, you can make individual items tax-exempt in your default menus (or on-the-fly, within an event).*
6. **[Optional]** Continue to add rates into the second and third tax columns as desired.
***Note:** Multiple tax rates are often used by European or Canadian companies, and can also be used in the United States to track separate "City," "State," and "County" taxes.*
7. Continue to add rates for default **Gratuity** and/or **Service Charge** for each type of menu item by typing into their respective columns.
8. **[Optional]** Click into the checkbox labeled **Tax Grat** or **Tax Serv Chg** at the top of the fifth or seventh column, respectively, to apply a tax to your gratuity or service charge rates.
***Result:** The gratuity or service charge of each new event will be taxed at the rate or rates you have set on this screen.*
***Note:** If you wish to establish a new unique tax rate to apply to the gratuity or service charge, click into the checkbox labeled **At New Rate** at the top of the fifth or seventh column and set the new rate manually.*
9. **[Optional]** Click into the checkbox labeled **Tax Exempt** at the bottom left of the window to make all new orders in your program default to tax-exempt.
***Note:** Individual events can be designated as tax-exempt, as well.*
10. **[Optional]** Enter whole dollar amounts in any of the fields listed under **Additional Adjustments** (lower right of window) to add that amount to the subtotal, tax, gratuity, or service charge of all new events.
***Note:** These adjustments can also be made within individual events.*
11. Click the **OK** button at the bottom right of the window when finished.

Creating Multiple Tax Schedules

1. Click the **Tax Schedules** button at the top right of the Default Tax & Service Charge Rates window.
***Result:** The window expands to expose a new pane on the right-hand side.*

2. Click the **Add Tax Schedule** button .

Result: A confirmation prompt appears.

3. Click **Yes**.

Result: A new tax schedule is added to the pane on the right of the window, with your cursor positioned to enter a new name.

4. Type a name for your new schedule, and press your **[Enter]** key.

Result: Your new schedule name is saved.

5. Enter tax, gratuity, and service charge rates as described in "Setting Tax/Service Charge Rates," above.

Note: Specific tax schedules can be linked to individual customers or to individual site locations. Otherwise, new events will default to reflect your "primary" schedule.

6. Repeat to add additional schedules, or click the **OK** button at the bottom right of the window when finished.

Note: You are able to incrementally search for your tax schedules by typing into the Search field, located at the upper right-hand side of the extended Tax Schedules window.

Renaming Tax Names

1. Click the **Administration** ribbon tab and choose **General > Customize Names**.
2. In the **Financials** group, click into the Tax 1, Tax 2, and/or Tax 3 fields, and type new names as desired.

Note: You can rename "Gratuity" and "Service Charge" here, as well.

Customize Names [X] [Reset Names]

General

Client/Organization	Client
Party Name	Party Name
Sales Representative	Booking Agent
Coordinator	
Reference	Reference
Loyalty #	Loyalty #
Required Items	Required Items

Financials

Gratuity	Gratuity
Service Charge	Administrative Fee
Taxes 1	State
Taxes 2	City
Taxes 3	County
Event Value	Value

Events

SubEvent	Sub-Event
Event Category	Category
Banquet Room	Room
Room Category	Room Category
Room Charge	Room Chg
(Scheduled) Items	Tables

► **Times**

► **Enterprise**

► **Miscellaneous**

[OK] [Cancel]

- When finished, click **OK**.

Adding a New Menu

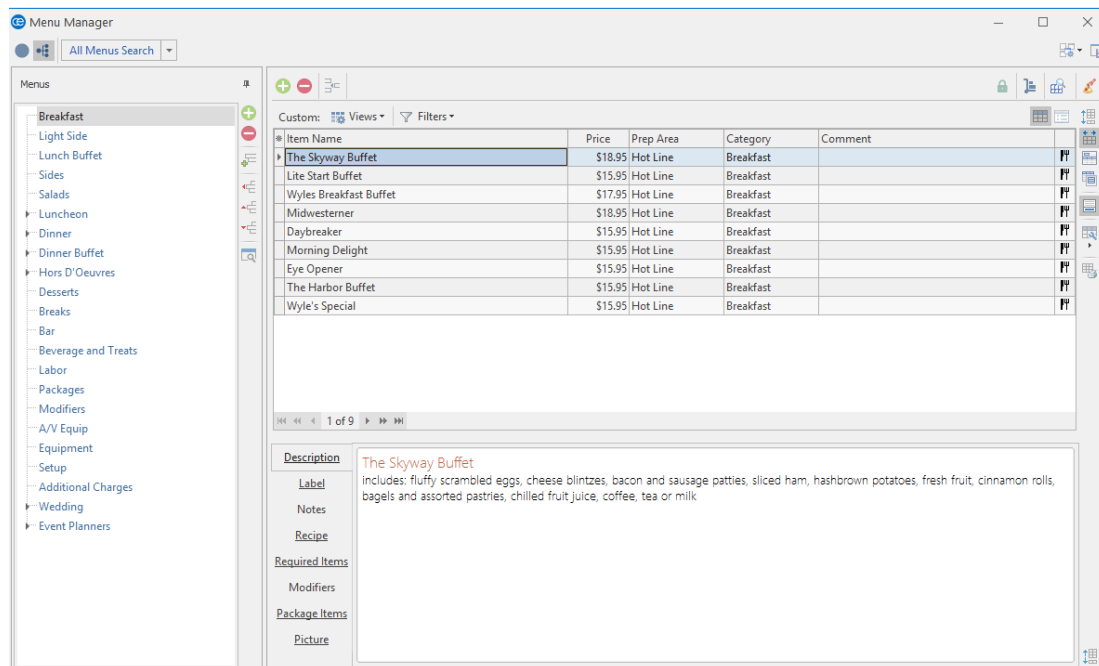
All of your program's default menus - for food and beverage items, rental equipment, and even miscellaneous charges, such as setup fees, etc. - are managed in Menu Manager. Here you can edit existing menus and create new ones, even organizing items into "sub-menus" for easier access.

Adding a New Menu or Sub-Menu

1. Open your Menu Manager (**Setup** sidebar > **Menu Manager**).

Result: The Menu Manager window opens.

Note: As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Menu Manager**.



2. Click the **Add New Menu** button , located along the left pane of the window.

Result: A confirmation prompt appears.

3. Click **Yes**.

Result: A new menu is added to your menu list, with your cursor positioned to type a new title.

Note: This button is identical to the **Add Menu Item** button at the top of the Menu Manager window (as well as the **Add Record** button in the **Home** ribbon tab at the top of the screen); be careful not to confuse them.

4. Type a name for your new menu, and then press your **[Enter]** key.

Result: Your new menu name is saved.




5. **[Optional]** Create a sub-menu of another menu by first selecting a title in the

left pane of the window and then clicking the **Add Sub-Menu** button .

6. Add new menus to your default list as desired.

Note: It is recommended, when adding items to a new menu, that you take care to set the first item up with the appropriate "Type," "Category," "Prep Area," etc., because each additional item you create will mirror the first item in these settings.

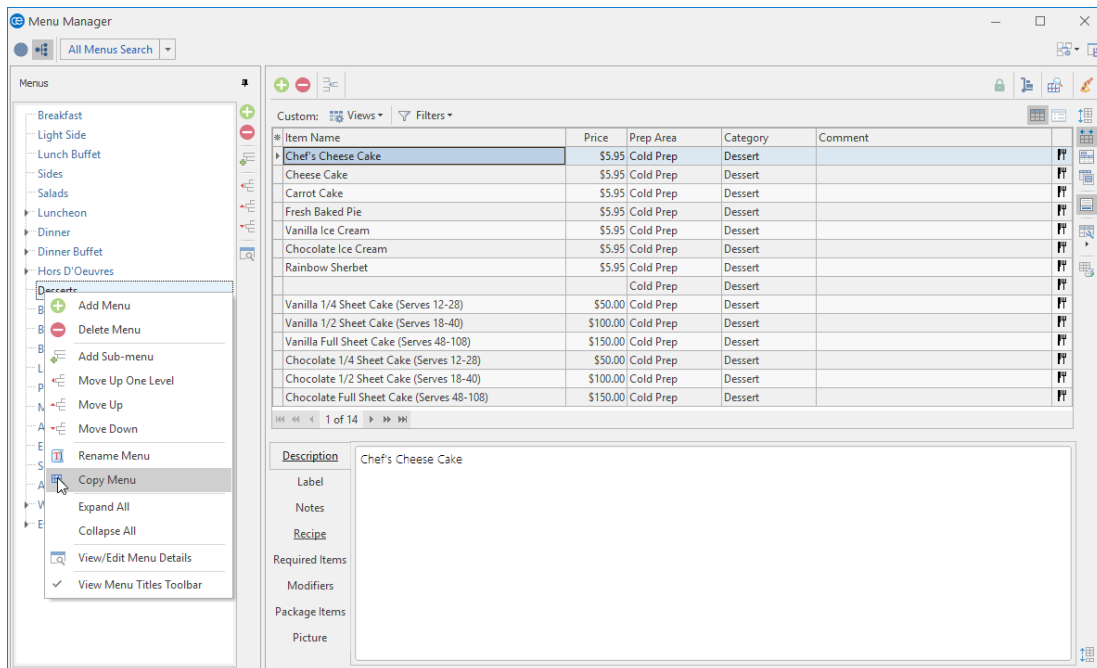
Tip: If you click on the title of a "sub-menu" before adding a new menu in Step 2, the new menu will be added on the same "sub-menu" level. You can also drag and drop menu titles into different positions in the title pane, optionally making them sub-menus of other menus. As you drag, pay attention to your mouse pointer for the indicators described below.

- **Drop Above**  : Indicates that the menu you are dragging will be dropped above another menu.
- **Drop Below**  : Indicates that the menu you are dragging will be dropped below another menu.
- **Drop As Child**  : Indicates that the menu you are dragging will become a sub-menu of another menu.

Copying an Existing Menu

1. On the left-hand side of the Menu Manager window, right-click on the title of the menu you want to copy.

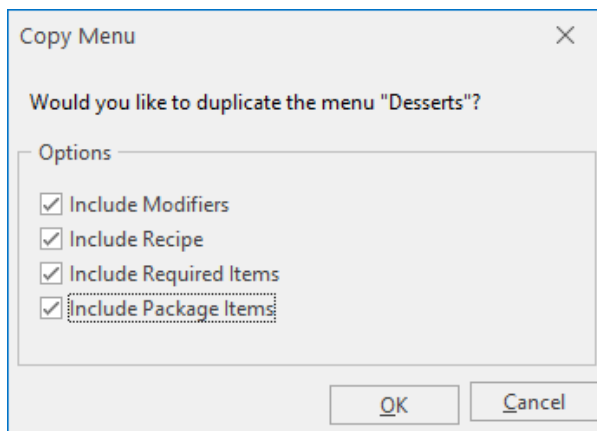
Result: A popup list of options displays.



2. Choose **Copy Menu**.

Result: A Copy Menu window opens, offering certain options.

Tip: Once you copy a menu, you can drag and drop its title into a different position in the title pane, optionally making it a sub-menu of another menu. As you drag, pay attention to your mouse pointer for the indicators described above.



3. Click into the checkbox next to any options you want to include in the copy, and then click **OK**.

Result: A copy of the menu is added to your menu list, with the cursor in the Title field, ready for you to type a new title.

Note: Options include the choice to include ingredients, required items, or modifiers for items in the original menu, as well as "sub-items" for any automatic menu package items.

4. Type a name for the new copy, and then press your **[Enter]** key.

Adding Items to a Menu or Sub-Menu

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

Result: The Menu Manager window opens.

Note: As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Menu Manager**.


2. In the left pane of Menu Manager, click the title of the menu or sub-menu you want to add an item to.

Note: Click the expand button to the left of a menu title to access its "sub-menus."

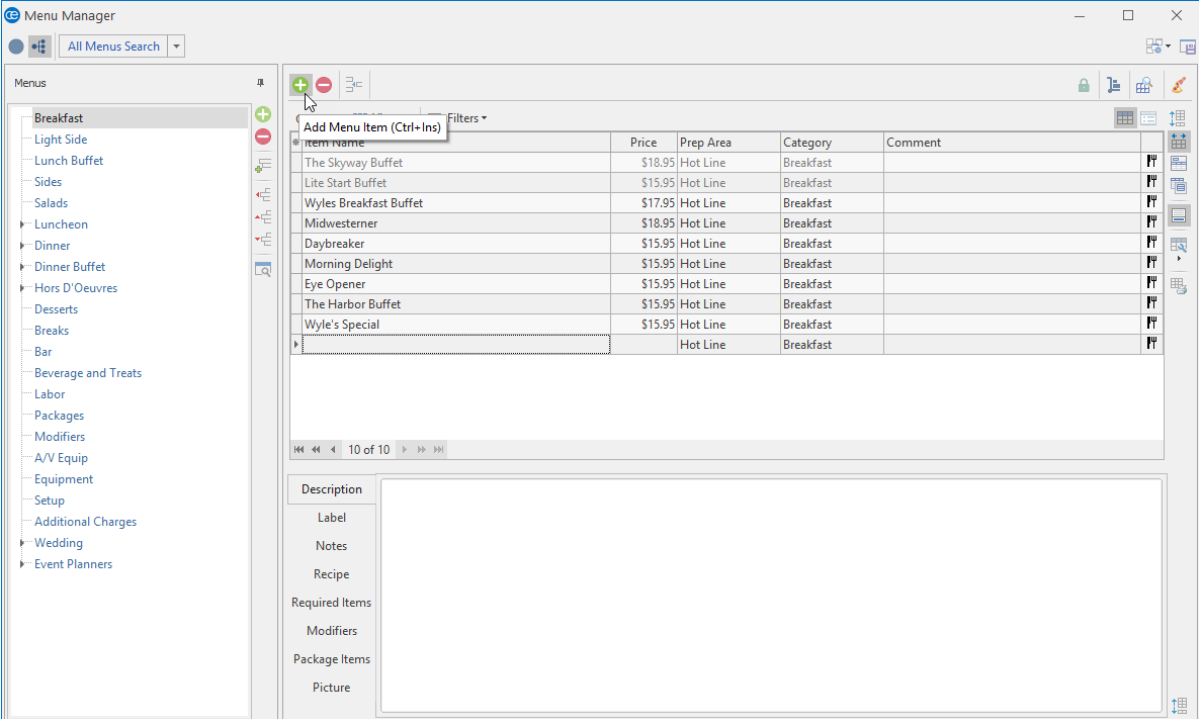
3. Click the **Add Menu Item** button , located at the top of the Menu Manager window.

Result: A blank line is added to the bottom of this menu.

Note: This button is identical to the **Add New Menu** button near the left pane

of your Menu Manager, so take care not to confuse them. You can also use the **Add Record** button  in the **Home** ribbon tab at the top of your screen.

Tip: It is strongly recommended that you establish the Item Type, Prep Area, and Category (as desired) appropriately for the first item in a new menu PRIOR to adding additional items. New menu items default this information from the line that is highlighted when you click the **Add Record** button.



Item Name	Price	Prep Area	Category	Comment
The Skyway Buffet	\$18.95	Hot Line	Breakfast	
Lite Start Buffet	\$15.95	Hot Line	Breakfast	
Wyles Breakfast Buffet	\$17.95	Hot Line	Breakfast	
Midwesterner	\$18.95	Hot Line	Breakfast	
Daybreaker	\$15.95	Hot Line	Breakfast	
Morning Delight	\$15.95	Hot Line	Breakfast	
Eye Opener	\$15.95	Hot Line	Breakfast	
The Harbor Buffet	\$15.95	Hot Line	Breakfast	
Wyle's Special	\$15.95	Hot Line	Breakfast	
		Hot Line	Breakfast	

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Description

Label

Notes

Recipe

Required Items

Modifiers

Package Items

Picture

4. Type a Item Name for the new menu item into the Item Name field.

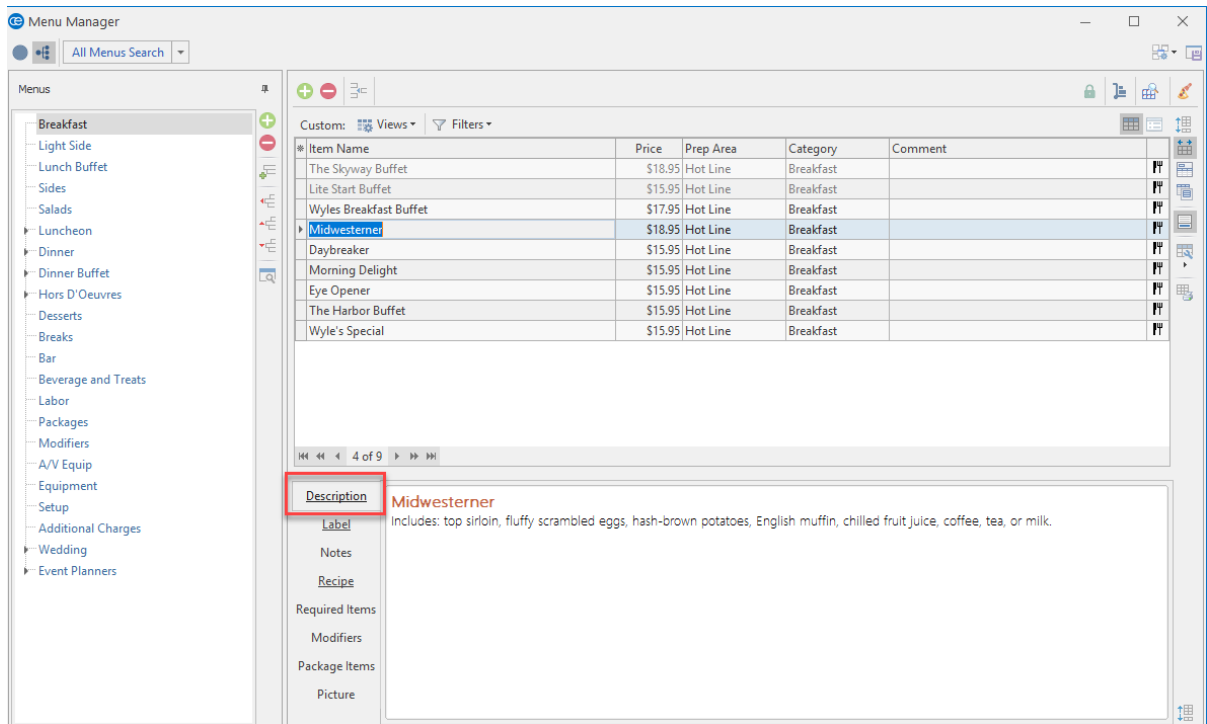
Note: As a default, Menu Manager uses the Item Name of your new item as its Description (see "Creating a Description ...," below). This allows you to include the text on your printed documents with any font formatting you want.

5. Press your **[Enter]** key.
Result: Your cursor is moved one column to the right, most likely to the Price column.
 6. Type a Price for the new item into the Price field.
 7. Press your **[Tab]** or **[Enter]** key.
Result: Your cursor is moved one column to the right, most likely to the Prep Area column.
 8. **[Optional]** Enter a Prep Area for the item, by typing directly into the field or by choosing an option from your quickpick list. "Prep Area" can be displayed on your custom prints and/or used to track your menu items.
Note: This field offers a custom quickpick list you can customize. See the note, below, for important information about setting defaults for these fields.
 9. Press your **[Tab]** or **[Enter]** key.
Result: Your cursor is moved one column to the right, most likely to the Category column.
 10. Enter a Category for the item, which can be displayed on your custom prints and/or used to track your menu items.
Note: This field, too, offers options from a customizable quickpick list.
 11. Press your **[Tab]** or **[Enter]** key.
Result: Your cursor is moved one column to the right, most likely to the Comment column.
 12. **[Optional]** Enter a Comment for the item, which can optionally be displayed on your various custom prints and reports, or choose an option from the drop-down quickpick list.
 13. Click the down arrow next to the Item Type column (far right column) and choose an appropriate Item Type for the menu item.
Note: Your available options, depending upon what you have set up, include Food, Beverage, Liquor, Equipment, Labor, Room, Delivery, Floral, Beer, Wine, or Other.
- Important:** Each event might have different tax, service charge, or gratuity rates for each type of menu item, so it is extremely important that the appropriate Item Type be chosen for each item. See the tip for important information about default settings for this field.
14. See "Editing Additional Menu Item Details," below, for more information you can customize about this item.

Creating a Description, Label, Notes, or Image for an Item


1. Click into the **Description** text box at the bottom of the Menu Manager window and type as desired.
Note: Descriptions can be included on custom prints in lieu of Item Names to allow for more detail and more flexibility in font formatting. The Item Name of your new menu item will be entered here as a

default.



2. **[Optional]** Click the **Label**, **Notes**, or **Recipe** tabs and enter text into the respective text boxes as desired.
Note: Event Manager offers special prints for both menu item Labels and Recipes (or place cards for buffet lines); "Notes" can be included on custom event prints.
3. **[Optional]** Use the font-formatting tools on the **Home** ribbon tab at the top of your screen to format the text you have entered.
4. **[Optional]** Click the **Picture** tab. Right-click within the text box and choose **Load From File** to browse to an image to use for the menu item.
Note: Images can be included on custom event prints, if desired.


Editing Additional Menu Item Details

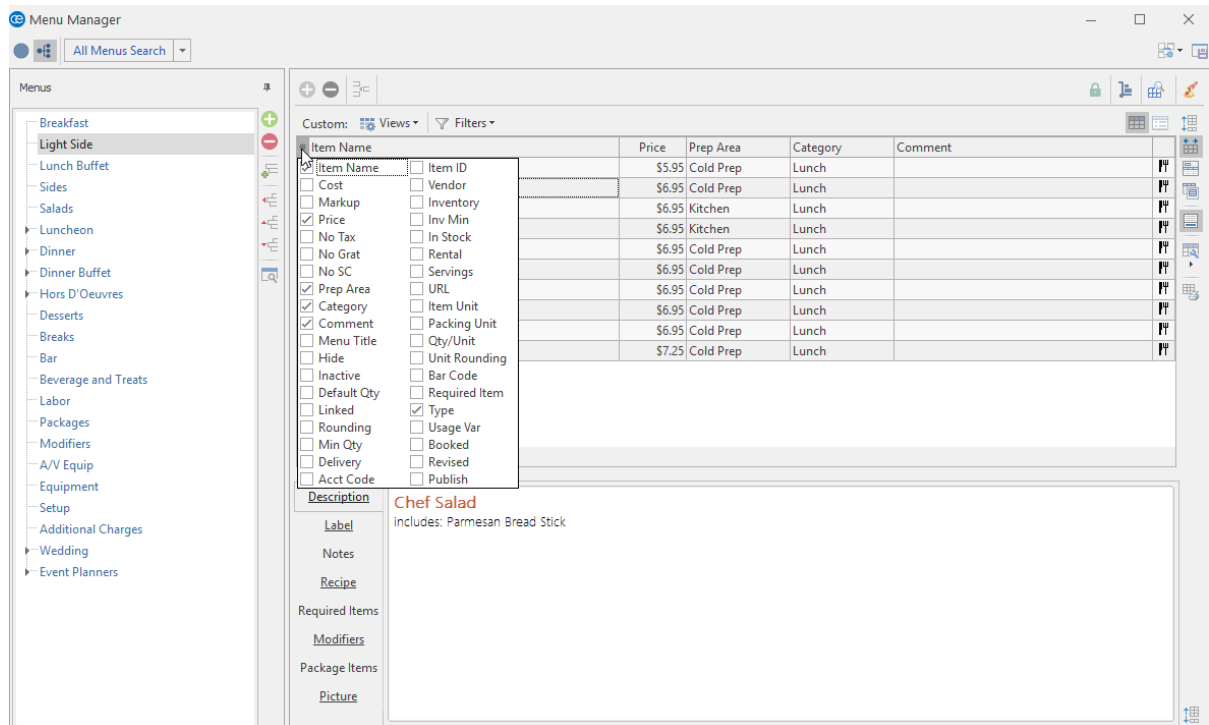
1. Click the **Quick Column Customizing** button , located at the top left of the menu item grid in Menu Manager.
Result: A drop-down list of optional columns appears.
Note: See "Fields Available in the Menu Items Grid," below, for a list of available columns for this grid.

Tip: If you want the new columns you've selected to be displayed in the Menu Manager grid as a default, click the **Save Current Window Settings** button at the top right of the window.

2. Click into the checkbox next to any column heading to have that column appear in the grid.

Result: Any columns with checks next to them appear in the grid.

Note: The **Automatically Set Column Widths** button  on the top right-hand side of the Menu Manager window is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.



3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.

Note: You can also drag column headings left and right in the grid itself.

4. Enter information into the new fields as outlined in "Fields Available in the Food/Service Items Grid," below.

Fields Available in the Food/Service Items Grid

The following fields are available for display in the menu item grid in Menu Manager:

Field	Description
Item Name*	Identifies the food/service item; can be printed on event prints in lieu of or in addition to description (see below).
Cost	Indicates the cost of the food/service item; can be directly typed into the field, or can be automatically calculated as a sum of ingredient item costs.
Markup	Multiplies times the item cost (above) to automatically calculate the Price (below); a "10%" markup would be entered as "1.1" (Cost X 1.1 = Price).
Price*	Indicates the price of the food/service item.


Field	Description
No Tax	Offers a checkbox to make the food/service item non-taxable as a default.
No SC	Offers a checkbox to remove service charge from the food/service item as a default.
No Grat	Offers a checkbox to allow you to make this individual item exempt from any gratuity normally assigned to items of this Type.
Prep Area*	Indicates the area or personnel responsible for preparing the food/service item; e.g., "Kitchen," "Bar," "Cold Prep"; can be used for tracking purposes or optionally included on prints; event menus are separated based on this field on the Production Sheet event sub-print.
Category*	Allows you to categorize food/service items for tracking purposes; offers a customizable quick-pick list of options, while "Type" (see below) is a hard-coded field (e.g., items with a Type of "Liquor" can be separated into categories of "Beer," "Wine," "Liquor," etc.); can be optionally included on custom prints.
Comment*	Allows up to 50 characters of general comment about a food/service item; can be optionally included on prints.
Menu Title	Lists the title of the menu the item is located in; helpful when reviewing all items from all menus simultaneously.
Hide	Offers a checkbox allowing you to hide this food/service item by default on event prints that are set to allow item hiding; achieves the purpose of "passing notes" to the kitchen or other back-of-house staff.
Inactive	Designates this item as being temporarily inactive; it will appear grayed out here in Menu Manager, and will not be visible at all when selecting items for an event.
Default Qty	Allows you to establish a default quantity for the item when pulled into an event; can be used in conjunction with "Linked" below to calculate a quantity per guest (e.g., a Default Quantity of "3" for each guest attending the event").
Linked	Offers a checkbox allowing you to link the quantity of this food/service item to the guest count of an event as a default.
Rounding	Used in conjunction with the two options above to avoid partial quantities; e.g., a pastry with the Default Quantity of "1.5" which is also Linked to the guest count for a party of 25, will default a quantity of "37.5" pastries. In this case you might round it "Up."
Min Qty	Allows you to establish a minimum quantity for an item when it is selected into an event.
Delivery	Offers a checkbox allowing you to designate a food/service item as deliverable as a default; items must have this box checked to appear on delivery prints and reports.
Acct Code	Offers a unique identifier for the food/service item; used in interfaces with third-party software.
Item ID	Offers a unique identifier for the food/service item; used in interfaces with third-party software.
Vendor	Identifies a vendor responsible for providing the food/service item.
Inventory	Offers a checkbox for you to designate a food/service item as inventoried.
Inv Min	Allows you to establish a minimum quantity for an item in inventory when it is selected into an event.
In Stock	Allows you to establish the number of inventory items that are in stock.
Rental	Offers a checkbox for you to designate an item (such as AV Equipment, Chairs, Tables, etc.), as rental items.
Servings	Allows you to designate the number of servings for a particular menu item.
URL	Allows you to enter a website address.
Item Unit	Allows you to track a unit of purchase for each item and its associated unit.
Packing Unit	This field relates to Required Items. Allows you to tracking the quantity of the packing unit and its associated unit.
Qty/Unit	This field relates to Required Items/Packing Unit, above. Pertains to how many items (or servings) a packing unit can hold.
Unit Rounding	This field relates to Required Items/Packing Unit, above. Pertains to how you would like the Qty/Unit to be rounded.
Bar Code	You can enter a bar code number into this field. Bar codes can be printed as part of any contract, and will print in classic bar code format. Additionally, bar code labels can be generated from the Food/Service Activity Query.
Required Item	Allows you to designate a food/service item as "required."
Type*	Allows you to categorize items as being "Food," "Beverage," "Liquor," "Equipment," "Labor," "Room" or "Other"; list is hard-coded; THIS DETAIL IS IMPERATIVE, AS IT DETERMINES TAX, SERVICE CHARGE AND GRATUITY RATES FOR INDIVIDUAL ITEMS.

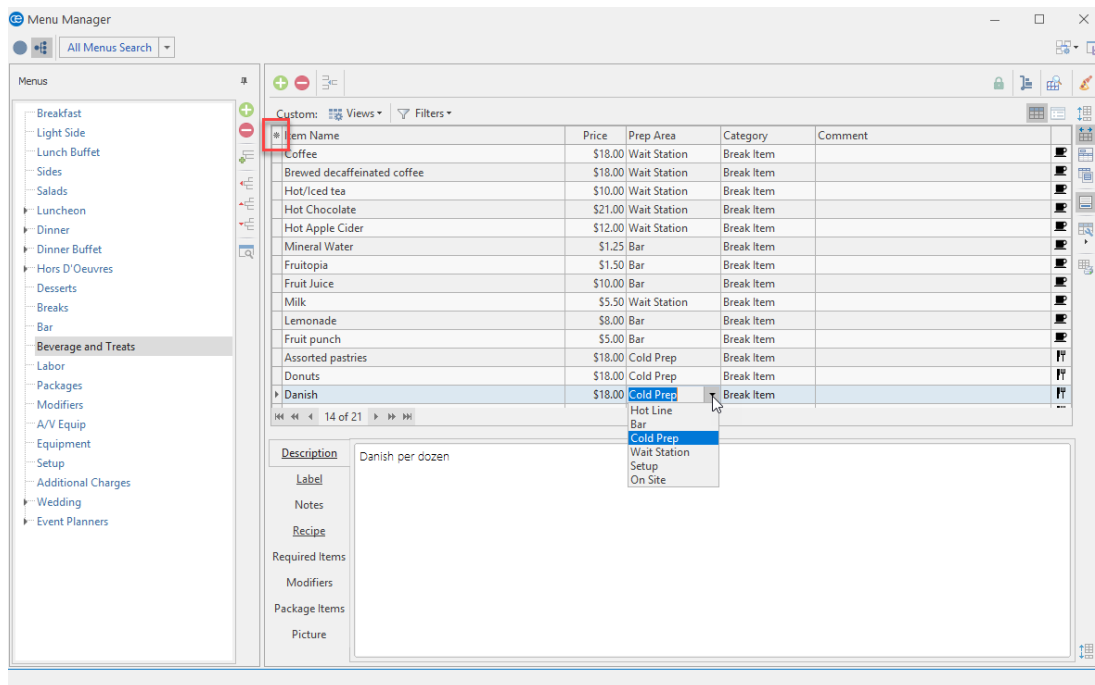
Field	Description
Usage Var	An item's Usage is the number of the particular item that was booked in any active event.
Booked	Allows you to track a day or date range on which a particular food/service item was booked.
Revised	Allows you to track a day or date range on which a particular food/service item was booked.
User Defined Fields	You can make up your own custom fields pertaining to food/service items and display them in this grid as well.
* Displayed on the grid by default.	

Assigning a Prep Area for a New Menu Item

The Prep Area field gives you the powerful ability to generate an event print with separate sections or pages showing the responsibilities for each prep area, department, or person. For example, if an order has menu items with the Prep Areas of Kitchen, Bar, and Setup, then three sections (or pages, one for each of those areas) will be generated when you print the Production Sheet for that order.

Using the Prep Area Feature


1. Access the Menu Manager by clicking the **Menu Manager** button from the **Setup** sidebar on the left-hand side of your screen.
2. From the **Menus** pane on the left-hand side of your screen, click on the title of the menu containing the item to which you would like to assign a Prep Area.
3. Click on the specific menu item on the right-hand side of the screen. (You can also assign a prep area to multiple items.)
4. Click the down arrow at the right of the Prep Area field to select an available option from your custom quickpick list.
*Note: If the Prep Area column is not currently displayed on your screen, retrieve it by accessing your **Quick Column Customizing tool** .*
5. Click the down arrow at the right of the Prep Area field to select an available option from your custom quickpick list.



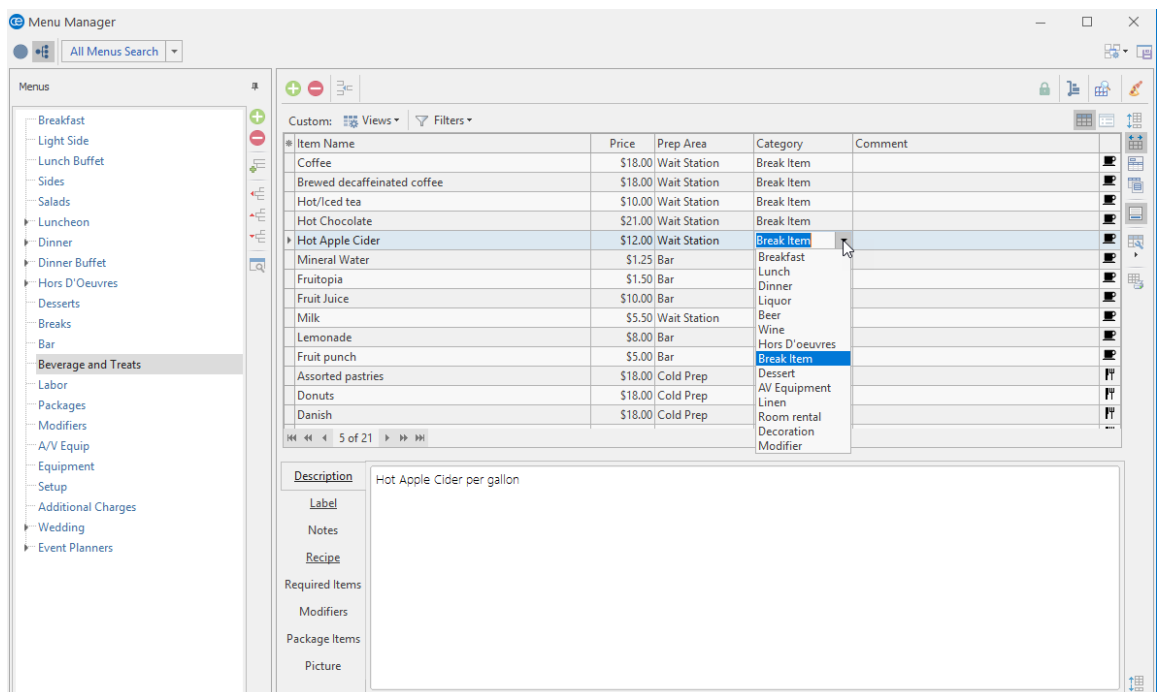
Establishing a Category for a New Menu Item

You can distinguish a menu item from the general Item Type by further defining it as a category (for example, you would like to track just your monthly beer and wine sales, instead of all liquor sales).

Establishing a Category for a New Menu Item

1. Access the Menu Manager by clicking the **Menu Manager** button from the **Setup** sidebar on the left-hand side of your screen.
2. On the left-hand side of the Menu Manager, click on the title of the menu containing the item you want to categorize.
3. Click the menu item for which you want to assign a Category. (You can also assign a Category to multiple items.)
4. If the Category column is not currently displayed on your screen, retrieve it from your **Quick Column Customizing** tool , located to the left of the **Item Name** column..
5. Select a Category from the drop-down quickpick list.

Note: Categories can be entered as quickpicks in **Setup > Quickpicks > Menu Items > Category**.



The screenshot shows the Menu Manager window. On the left is a sidebar with a tree view of menu categories. The main area displays a table of menu items. A right-click context menu is open over the 'Hot Apple Cider' item, showing a list of categories to assign.

Item Name	Price	Prep Area	Category	Comment
Coffee	\$18.00	Wait Station	Break Item	
Brewed decaffeinated coffee	\$18.00	Wait Station	Break Item	
Hot/Iced tea	\$10.00	Wait Station	Break Item	
Hot Chocolate	\$21.00	Wait Station	Break Item	
Hot Apple Cider	\$12.00	Wait Station	Break Item	
Mineral Water	\$1.25	Bar	Breakfast	
Fruitopia	\$1.50	Bar	Lunch	
Fruit Juice	\$10.00	Bar	Dinner	
Milk	\$5.50	Wait Station	Liquor	
Lemonade	\$8.00	Bar	Beer	
Fruit punch	\$5.00	Bar	Wine	
Assorted pastries	\$18.00	Cold Prep	Hors D'oeuvres	
Donuts	\$18.00	Cold Prep	Break Item	
Danish	\$18.00	Cold Prep	Dessert	

The context menu for 'Hot Apple Cider' shows the following options: Break Item, Breakfast, Lunch, Dinner, Liquor, Beer, Wine, Hors D'oeuvres, Break Item, Dessert, AV Equipment, Linen, Room rental, Decoration, and Modifier.

Below the table, there is a section for item details:

- Description:** Hot Apple Cider per gallon
- Label:**
- Notes:**
- Recipe:**
- Required Items:**
- Modifiers:**
- Package Items:**
- Picture:**

Creating an Inventory for Reusable Items


You can designate a reusable food/service item, including an event Required Item, as an inventoried item, and you can record the minimum number on hand and the total number you have in stock. You can even set custom return times for the items, in case you need additional time to clean or restock them, etc.


Using the Inventory Feature (Menu Manager)

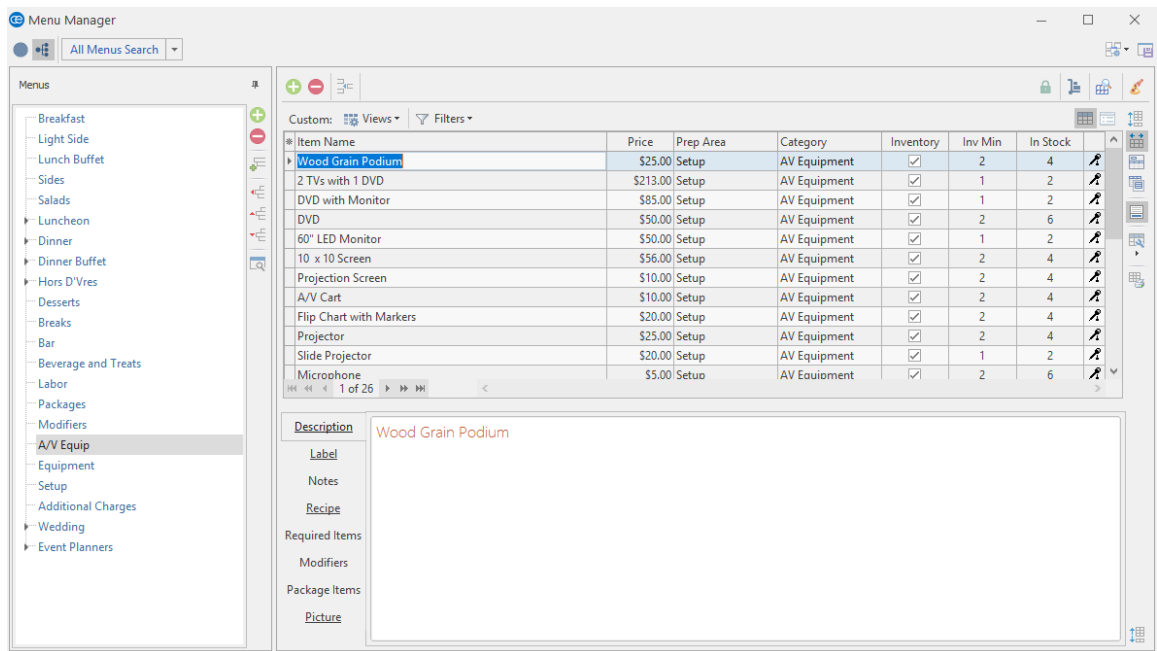
1. Access Menu Manager by clicking the **Menu Manager** button from the **Setup** sidebar on the left-hand side of your screen.
2. On the left pane of the Menu Manager, click the title of the menu containing the item you would like to inventory.
3. Click into the checkbox in the **Inventory** column to designate the food/service item as "inventory."

Note: If the **Inventory** column is not displayed by default, use the **Quick Column Customizing** tool  to add this column to your screen display.

4. Type the Inventory Minimum amount into the Inv Min field, and then press **[Tab]** or **[Enter]** to move to the next field.
5. Type the amount of inventory you currently have in stock into the In Stock field, and then press **[Enter]**.

Note: If the **Inventory Minimum** and **In Stock** columns are not currently displayed on your screen, retrieve them from your **Quick Column Customizing** tool , located to the left of the **Item Name** column.

6. Click the **Save Current Window Settings** button  to save your new screen display as a default setting every time you open Caterease.



Assigning Inventory Out and Inventory Return Times for Inventoried Items

You can assign a special Inventory Out and Inventory Return time to all inventoried food/service items, different from the Start and End times of the corresponding sub-event itself. This will enable you to accurately keep track of the availability of every reusable food/service item in your inventory. For example, if a client rents an DVD player for an event but will be using it for only the first hour of the event, you can establish an Inventory Out and Inventory Return time to prevent an inventory conflict when you rent the DVD player again during the day.


1. Access the Event Manager by clicking the **Event Manager** button from the **Main** sidebar on the left-hand side of your screen.
2. Search for and retrieve the event for which you want to select inventoried items.
3. Click the **Tools** button, located at the top of your screen, and choose **Event Inventory**.

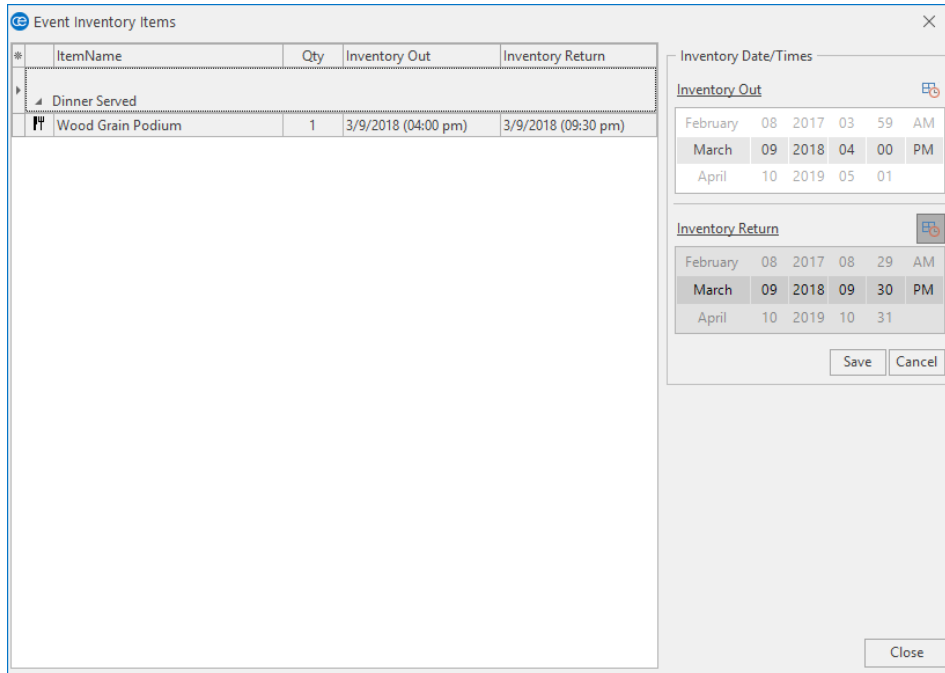
Result: The Event Inventory Items window opens.

Note: You may need to add this button to your **Tools** menu. (See the Help Topic "Customizing the Tools Menu and Tools Bar.")

Note: This window only displays items that are marked as "Inventory" in either the Menu Manager or the Required Items Manager.

- Use the two date/time wheels from the **Inventory Date/Times** pane on the right-hand side of the window to change an item's Out or Return date/times. (An inventory item's Out and Return times default to the sub-event's From and To date/time.)

Note: The **Linked to Sub-Event Times**  button is depressed if the item is using the default sub-event time. The "Inventory Out" and "Inventory Return" is highlighted in green if it deviates from the sub-event. If you want to change the times, de-select the **Linked to Sub-Event Times** button and make your changes. (Click the **Save** button after you have made your changes.)



The screenshot shows the "Event Inventory Items" window. It contains a table with the following data:

#	ItemName	Qty	Inventory Out	Inventory Return
1	Dinner Served			
2	Wood Grain Podium	1	3/9/2018 (04:00 pm)	3/9/2018 (09:30 pm)

On the right side, there is a pane titled "Inventory Date/Times". It contains two date/time selection wheels:

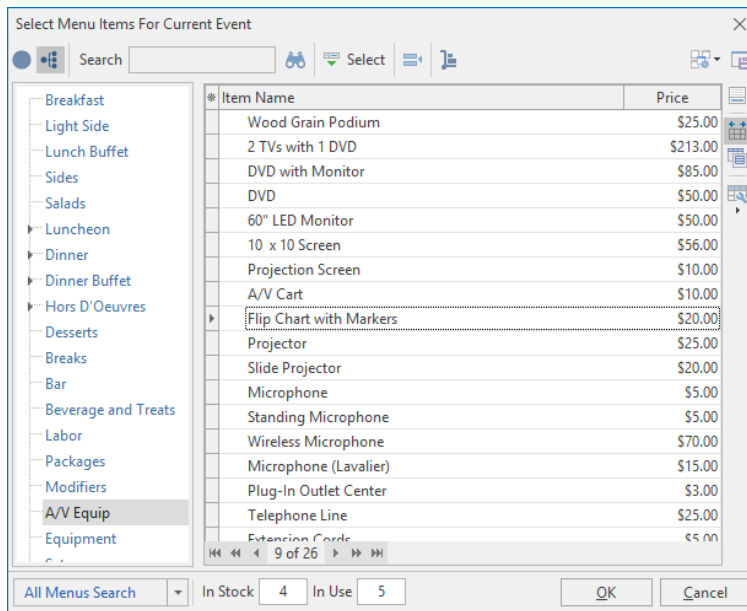
- Inventory Out:** Shows a date of March 09, 2018, at 04:00 PM. The "March 09" and "04:00 PM" are highlighted in green.
- Inventory Return:** Shows a date of March 09, 2018, at 09:30 PM. The "March 09" and "09:30 PM" are highlighted in green.

At the bottom of the right pane are "Save" and "Cancel" buttons. At the bottom right of the main window is a "Close" button.

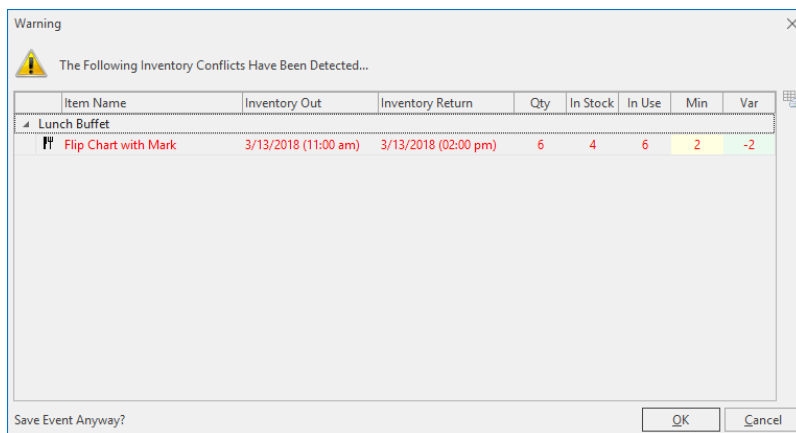
- From a Sub-Event in Event Manager, click the **Select Menus** button  to access your list of inventoried items.

Result: The Select Menu Items For Current Event window opens.

Note: The **In Stock** number and the **In Use** number display at the bottom left-hand side of the window.



6. If you select more items than you have on hand, you will receive a conflict message:



7. If this occurs, click the **Cancel** button and resolve the inventory conflict.

Establishing Minimum, Default, and Linked Quantities

You can set up your Menu items to default the quantity of menu items and link them to the guest count (and even link the quantity of any sub-event, or meal, to the guest count of a party). You can also establish a minimum quantity for any menu item, so when that item is retrieved into an event, the quantity can be increased but not decreased.

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

Result: The Menu Manager window opens.

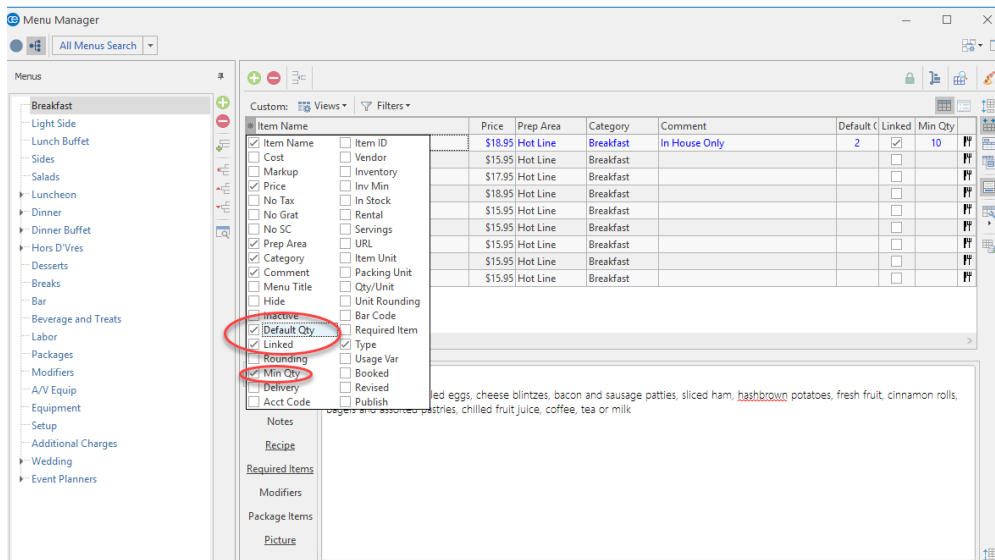
Tip: When in a party in Event Manager, blue font is the indicator that an item has been linked.

2. Click the **Quick Column Customizing** button , located at the top left of the menu item grid.

Result: A drop-down list of optional columns appears.

3. Click into the checkbox next to the Min Qty, Default Qty, and Linked fields to have those columns display in the grid.

Result: Any columns with checks next to them appear in the grid.



4. Type the desired values into the Default Qty and Min Qty fields.
5. Click into the **Linked** checkbox if you would like to link the quantity to your guest count.
6. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.

Note: You can also drag column headings left and right within the grid itself.

Tip: In your New Booking Defaults (**Administration** ribbon tab > **General** button > **New Booking Defaults** > **Sub-Events** tab), ensure the **Link Guests to Event** checkbox has a check in it.

7. Remember to click the **Save Current Window Settings** button  if you would like to retain these columns in your default view.

Establishing Default Base Price Markup Rates


You can create specific markup rates to retrieve into an event and cause menu item prices to automatically adjust. Alternatively, you can link specific markup rates to a client or site location, so whenever that client or location is used for a party, prices are automatically marked up accordingly.

Note: You can also select one of these markup schedules to default for each new event you create.


Adding a New Markup Schedule

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click **General > Base Price Markup Rates**.
Result: The Menu Item Base Price Markup Rate Schedules window opens.

Name	Inactive	Food	Beverage	Liquor	Equipment	Labor	Room	Other
10% Across the Board	<input type="checkbox"/>	1.1	1.1	1.1	1.1	1.1	1.1	1.1
20% Food, Bev, & Liquor	<input type="checkbox"/>	1.2	1.2	1.2				

3. Click the **Add Record** button , located on the right-hand side of the window.
Result: A "New Schedule" line is added to the list of rate schedules.
4. Type a name for your new rate schedule, and press your **[Enter]** key.
*Result: Your new name is saved, and your cursor moves to the first column in the schedule: **Inactive**.*
5. Optionally click into the **Inactive** checkbox at any time if you would like to make a base price markup schedule inactive.
6. Click into the **Food** column.
7. Enter markup rates as desired for each type of menu item.
Note: These markup rates will be multiplied by the base price of items in your events when this schedule is applied, and should be entered in decimal format. (For example, a "20%" markup would be entered as "1.2" - or 1.2 times the base price.)

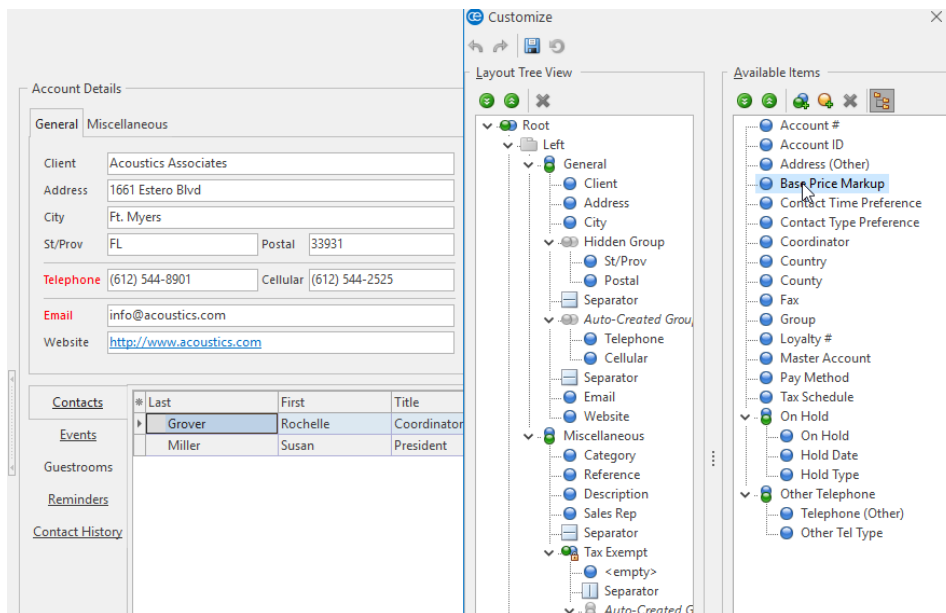
- Repeat the steps above as desired to add additional markup schedules.

Note: Clicking the **Delete Record** button  will delete the currently selected schedule.

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

Assigning a Default Markup Schedule to an Account

- Click the **Account Manager** button in the **Main** group of the program's sidebar to access Account Manager.
- Retrieve the account for which you wish to assign a default markup schedule.
- Customize your Account Manager screen to display the **Base Price Markup** field. (Right-click > **Customize** > drag the **Base Price Markup** field onto your screen, close the Customize window.)



- Click the down arrow to the right of the **Base Price Markup** field.
Result: A drop-down grid appears, listing all available markup schedules.
Note: See "Adding a New Markup Schedule," above, for more information.

Account Details

General Miscellaneous

Category: Corporate

Reference: Referral

Description: Association Member

Sales Rep: Kathy Wilson

☐ Tax Exempt

Expires:

Exempt #:

Base Price Markup:

Notes: Rochelle is main point of contact. All changes must go through her.

Name	Food	Beverage	Liquor	Equipmer	Labor	Room	Other
10% Across the Board	1.1	1.1	1.1	1.1	1.1	1.1	1.1
20% Food, Bev, & Liquor	1.2	1.2	1.2				

Contacts

Events

Guestrooms

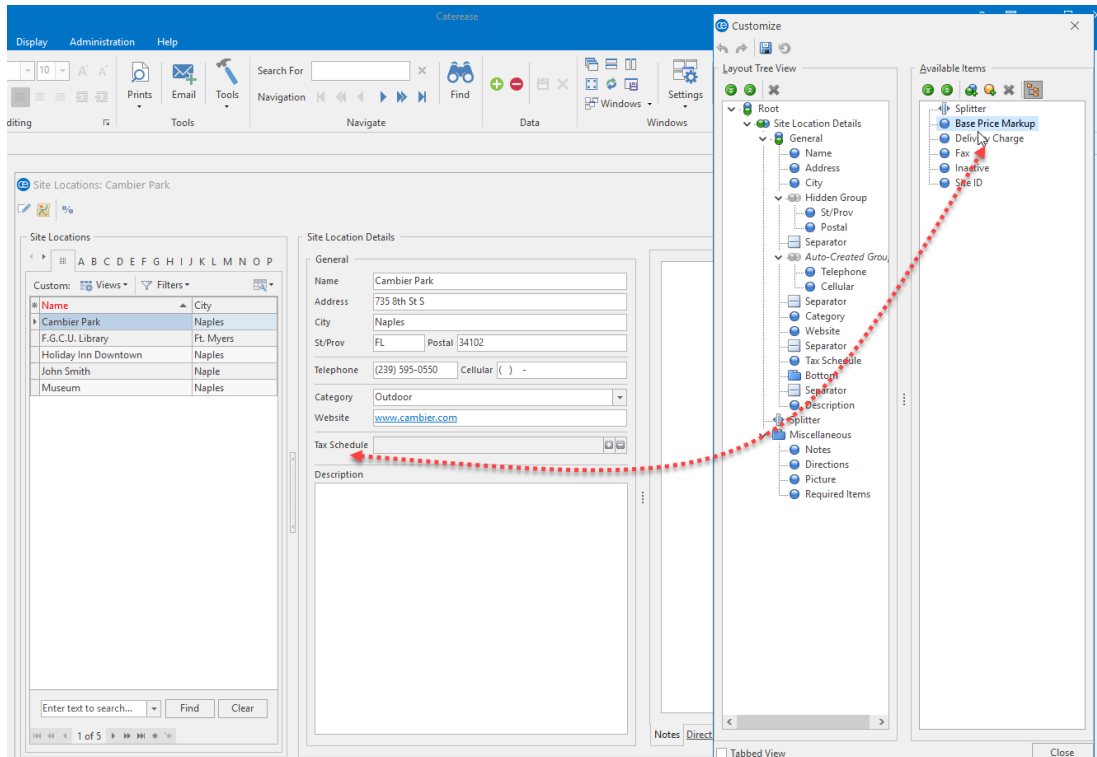
Reminders

Contact History

- Choose a specific markup schedule from the list.
Result: The selected schedule will default for all new events booked by this account.
- Close Account Manager, saving your changes.

Assigning a Default Markup Schedule to a Site Location

- Click the **Site Locations** button from the **Setup** sidebar group on the left-hand side of your screen.
Result: The Site Location Database window opens.
- Click on the site location for which you wish to assign a default markup schedule.
- Customize your Site Locations screen to display the Base Price Markup field.



4. Click the down arrow to the right of the Base Price Markup field.

Result: A drop-down grid appears, listing all available markup schedules.

Note: See "Adding a New Markup Schedule," above, for more information.

Site Locations: Cambier Park

Site Locations

Custom: Views Filters

Name	City
Cambier Park	Naples
F.G.C.U. Library	Ft. Myers
Holiday Inn Downtown	Naples
John Smith	Naple
Museum	Naples

Enter text to search... Find Clear

1 of 5

Site Location Details

General

Name: Cambier Park

Address: 735 8th St S

City: Naples

St/Prov: FL Postal: 34102

Telephone: (239) 595-0555 Cellular: () -

Category: Outdoor

Website: www.cambier.com

Tax Schedule: [icon] [icon]

Base Price Markup: [icon]

Description	Name	Food	Beverage	Liquor	Equipme	Labor	Room	Other	NA
10% Across the Board		1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1
20% Food, Bev, Liquor		1.2	1.2	1.2					

Notes Directions Picture Required Items



- Choose a specific markup schedule from the list.
Result: The selected schedule will default for all new events using this site location.
- Close the Site Locations window, saving the changes.

Tip: Click the **Site Commission Rates** button (%) to establish default commission rates for each site (as a percentage).


Adding Quickpick Items to the Menu Manager

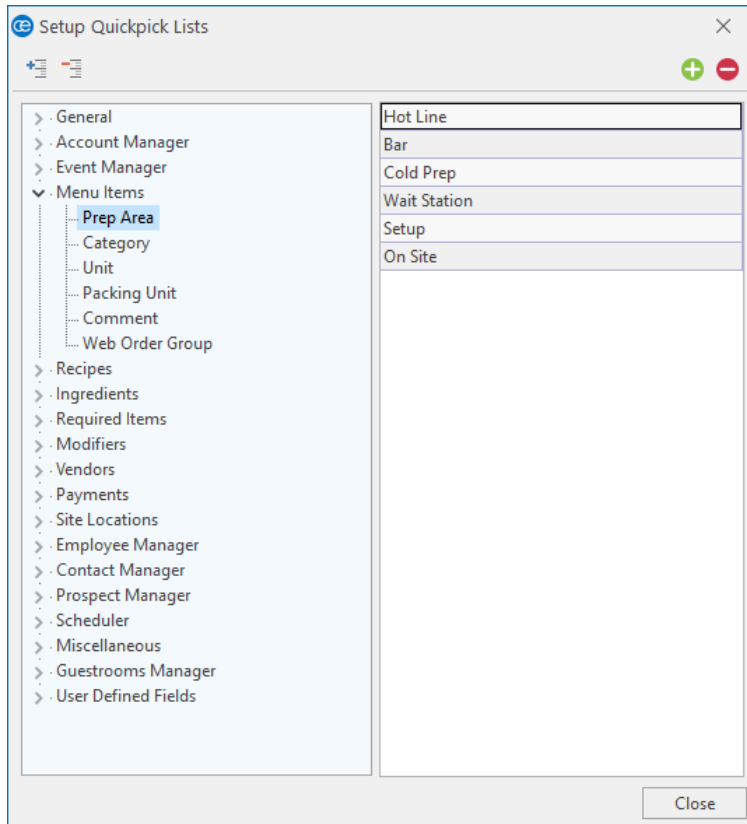
Throughout your Caterease program there are several drop-down lists, or “quickpicks,” to assist you in data entry. These lists exist to save you the tedium of double entry and to keep your data consistent. For example, rather than having to type the menu item Prep Area “Cold Prep” multiple times (and risk accidental misspellings), you can simply select it from your menu item Prep Area quickpick list. These lists are completely under your control; you can edit/modify them at any time. You are able to create quickpick lists for six fields of information in the Menu Manager: Prep Area, Category, Unit, Packing Unit, Comment, and Web Order Group.

Adding a Quickpick Item

1. Click the **Quickpicks** button from the **Setup** sidebar of your main Caterease screen.
Result: *The Setup Quickpick List screen opens.*
2. Click on the **Expand** button next to **Menu Items** to view the corresponding quickpick lists.
Note: Click the **Full Expand** button  if you would like to view all quickpick categories.
3. Click one of the following: Prep Area, Category, Unit, Packing Unit, Comment, or Web Order Group (if applicable)..
4. Add a new quickpick item to the list by clicking the **Add New Item** button , located on the upper right-hand side of the window.
Result: *A blank line is added to the bottom of the list.*
5. Type a name for your new quickpick item.
6. Press **[Enter]**.
7. Repeat steps 4-6 to create the remaining quickpick lists.
8. When finished, click **Close**.

Note: You can delete a quickpick item by clicking the item to select, then clicking the **Delete Current**

Item button , located at the top of the Setup Quickpick Lists form. You can also modify an existing quickpick item by clicking on the item, then typing the name of the new quickpick item. You can rearrange quickpick items in the list by clicking on an item, holding your left mouse button down, and dragging and dropping the item into place.



Unit 2: Building Ingredients Lists

In this section, you will learn:

- Adding an Ingredient List Category
- Adding Ingredient Items
- Using the Item Details View (Units Tab)
 - Building Sub-Recipes
 - Creating Item-Specific Units
 - Creating Custom General Units
- Assigning Ingredients to Menu Items
- Printing an Ingredients List

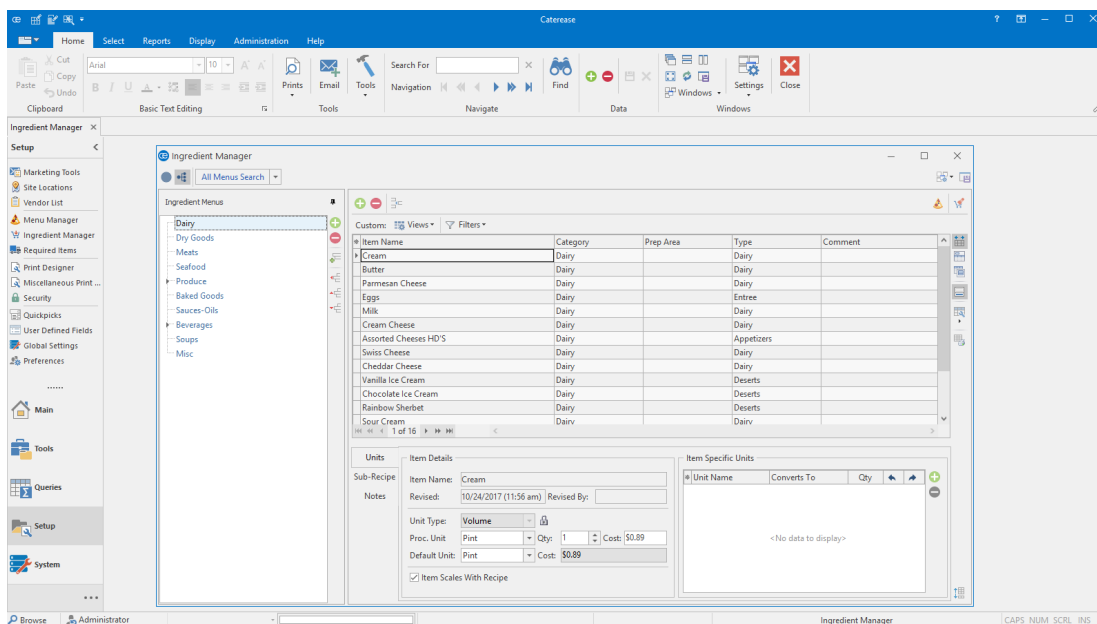
Unit 2: Building Ingredients Lists


Building Ingredients Lists

Caterease can keep track of your menu item ingredients in a simple two-step process: First, you want to establish an overall Ingredients List, with every ingredient you use for any item on your menus. Second, you will need to retrieve items from this list as ingredients for individual food items. Once you've created your overall Ingredients List, you can then link individual ingredients to specific menu items. When you add a menu item, you can select ingredients from the Ingredients List, assign each ingredient a unit/measure and cost, and the total cost of the item will be automatically computed. To track your ingredients, you have access to several Event Ingredients sub-prints.


Adding an Ingredient List Category

1. Click the **Setup** sidebar, located on the left-hand side of your screen, and choose **Ingredient Manager**.
Result: The Ingredient Manager window opens.
Note: As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Ingredient Manager**.



2. Click the **Add Menu** button , located along the left pane of the window, at the top.
Result: A confirmation prompt appears.
3. Click **Yes**.
Result: A new ingredient menu is added to the bottom of the list, with your cursor positioned to type a new title.
Note: This button is identical to the **Add Ingredient** button at the top of the Ingredient Manager win-

dow (as well as the **Add Record** button in the **Home** ribbon tab at the top of the screen); be careful not to confuse them.

4. Type a name for your ingredient menu, over the words "New Menu," then press your **[Enter]** key.
Result: Your new ingredient menu name is saved.
5. Optionally create a sub-menu of another menu by first selecting a title in the left pane of the window and then clicking the **Add Submenu** button .
Note: Sub-menus help organize ingredient items for easier selection.
6. Add items to your new ingredient menu as desired (see topic below).

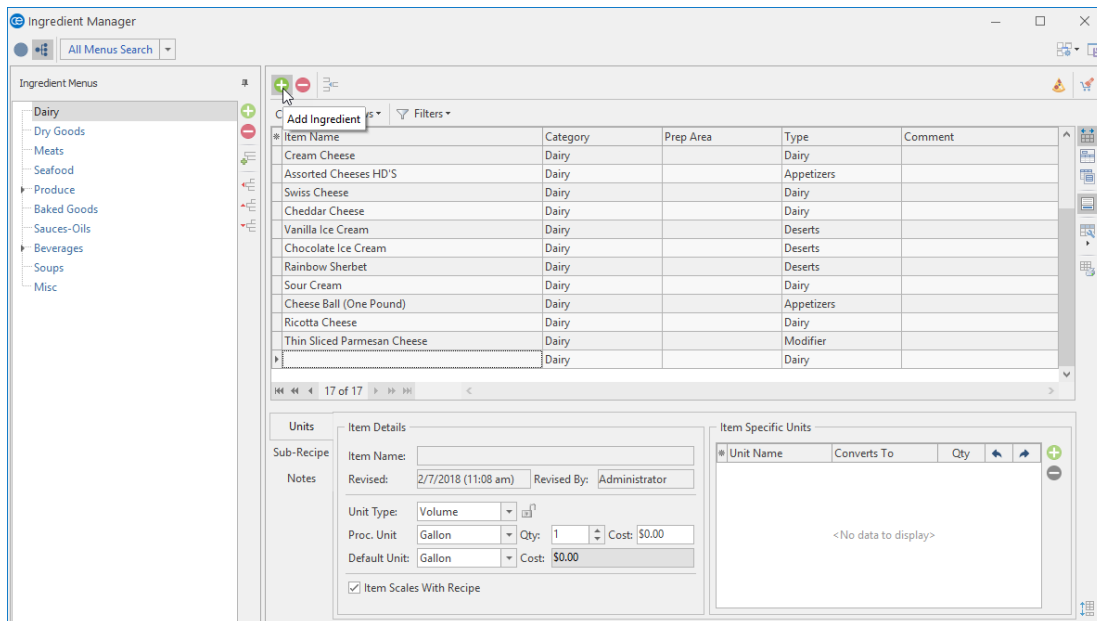
Adding Ingredient Items

1. In the left pane of the Ingredient Manager window, click the title of the menu or sub-menu you want to add an item to.
Note: Click the expand button to the left of a list title to access its sub-menus.

2. Click the **Add Ingredient** button , located at the top of the Ingredient Manager window.
Note: This button is identical to the **Add Menu** button near the left pane of your Ingredient Manager.

Take care not to confuse them. You can also use the **Add Record** button  in the **Home** ribbon tab at the top of the screen.

Result: A blank line is added to the bottom of the selected list.



The screenshot shows the 'Ingredient Manager' application window. On the left, a tree view under 'Ingredient Menus' has 'Dairy' selected. The main area displays a table of ingredients under the 'Dairy' category. Below the table, there are sections for 'Units' (Sub-Recipe, Notes), 'Item Details' (Item Name, Revised, Unit Type, Proc. Unit, Qty, Cost, Default Unit), and 'Item Specific Units' (Unit Name, Converts To, Qty).

* Item Name	Category	Prep Area	Type	Comment
Cream Cheese	Dairy		Dairy	
Assorted Cheeses HD'S	Dairy		Appetizers	
Swiss Cheese	Dairy		Dairy	
Cheddar Cheese	Dairy		Dairy	
Vanilla Ice Cream	Dairy		Deserts	
Chocolate Ice Cream	Dairy		Deserts	
Rainbow Sherbet	Dairy		Deserts	
Sour Cream	Dairy		Dairy	
Cheese Ball (One Pound)	Dairy		Appetizers	
Ricotta Cheese	Dairy		Dairy	
Thin Sliced Parmesan Cheese	Dairy		Modifier	
	Dairy		Dairy	

Item Details:

Item Name:

Revised: 2/7/2018 (11:08 am) Revised By: Administrator

Unit Type: Volume

Proc. Unit: Gallon Qty: 1 Cost: \$0.00


Default Unit: Gallon Cost: \$0.00

☒ Item Scales With Recipe

Item Specific Units:

* Unit Name	Converts To	Qty
<No data to display>		

3. Type an Item Name (description) for the new item into the Item Name field.

4. Press your **[Tab]** or **[Enter]** key.
*Result: Your cursor is moved one column to the right, most likely to the **Category** column.*
5. **[Optional]** Select a Category from the custom quickpick list or simply type one by hand.
6. Press your **[Tab]** or **[Enter]** key.
*Result: Your cursor is moved one column to the right, most likely to the **Prep Area** column.*
7. **[Optional]** Select a **Prep Area** for the item from the custom quickpick list, or type one by hand.
8. **[Optional]** Enter a **Type** to be used for tracking the ingredient item by selecting from the available custom quickpick list or simply typing by hand.
9. Press your **[Tab]** or **[Enter]** key.
*Result: Your cursor is moved one column to the right, most likely to the **Comment** column.*
10. **[Optional]** Type a comment into the Comment field.
11. When finished, save your changes by clicking the **Save Changes** button , located at the top of your screen.
12. Fill in **Item Details** as described below.

Using the Item Details View (Units Tab)

The **Item Details** area (bottom pane) allows you to manage ingredient-specific units, unit pricing, and unit conversions.


- **Item Name** - Refers to the name of the ingredient item.
- **Revised** - Provides a date- and time-stamp of when an item was revised, or modified.
- **Revised By** - Indicates the user name of the person who revised the ingredient item.
- **Unit Type** - Three standard Unit Types are available: Volume, Weight, and Quantity.
- **Procurement Unit** - The ingredient price is based on the Procurement Unit. This means that the cost of all other units are derived from the Procurement Unit cost.
Note: A sub-recipe ingredient has a Yield Unit rather than a Procurement Unit.
- **Default Unit** - This is the unit the ingredient defaults to when it is selected into Menu Manager.
- **Item Specific Units** - This is a user-defined unit that has a set relationship with a standard unit (Volume, Weight, Quantity). If an item (such as salt, for example), is a member of the Volume unit type and you want to use a unit of measure that is in the Weight unit type, you can define that in the ingredients-specific unit type area.
- **Item Scales with Recipe** - This feature is enabled by default. If an item is "scalable," the actual amount of the ingredient is derived from the servings of a particular recipe.

Note: If the **Item Scales with Recipe** checkbox is checked, the ingredient will scale with the number of menu items ordered that contain the selected ingredients.

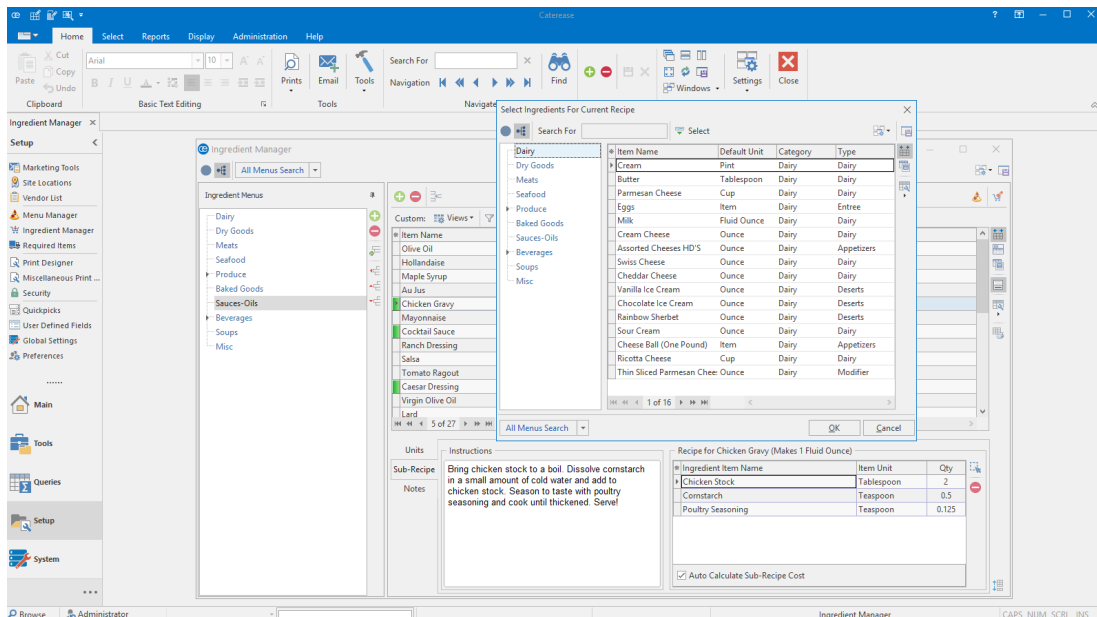
Building Sub-Recipes

An ingredient can be a stand-alone item or it can be an item that is part of a sub-recipe.

Important Note: When establishing a sub-recipe, all ingredients that comprise your sub-recipe *must* exist in your Ingredient Manager.


1. Click the **Setup** sidebar, located on the left-hand side of your screen, and choose **Ingredient Manager**.
Result: The *Ingredient Manager* window opens.
Note: As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Ingredient Manager**.
2. Click the **Sub-Recipe** tab, located in the lower left-hand pane.
3. Click the **Select Ingredient** button , located on the right-hand side of the window, in the lower right-hand pane.
Result: The *Select Ingredients for Current Recipe* window opens.
4. Select an ingredient or ingredients from the list of ingredients.
5. Click **OK** to close the window.
6. Confirm there is a check in the **Auto Calculate Sub-Recipe Cost** checkbox to ensure the cost of each ingredient in a sub-recipe is used to calculate the cost of the item.

Tip: Click on a *Sub-Recipe* to view any nested sub-recipes that have been added. Sub-Recipes are identified by a green indicator mark.

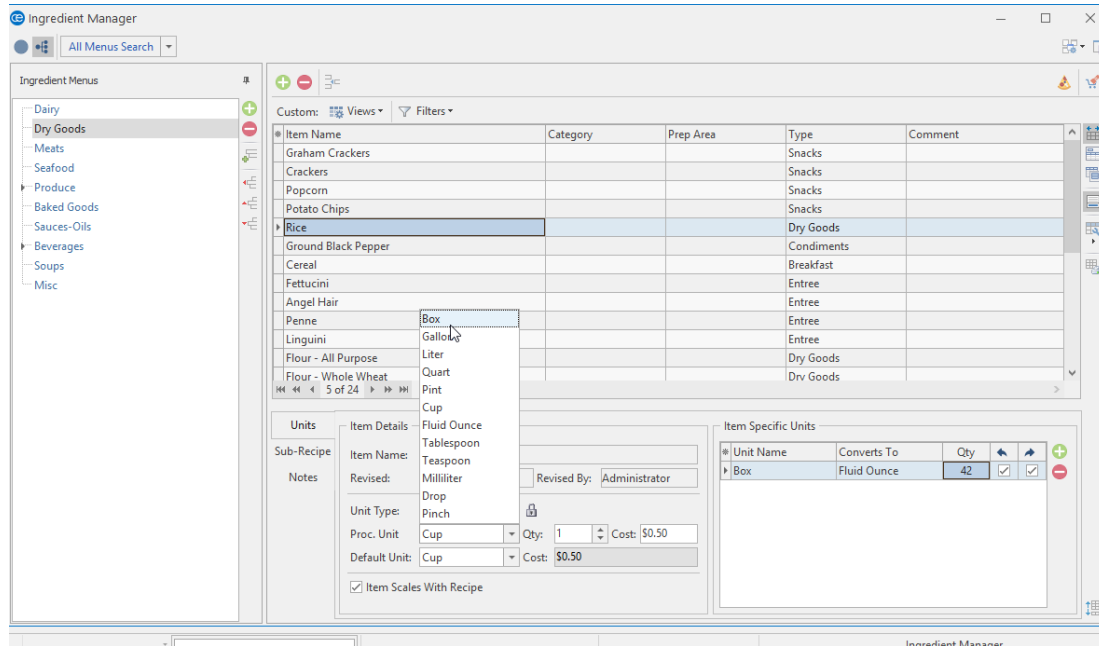


Creating Item-Specific Units

Some units of measure might be unique to specific ingredient items, even if they appear to be generic. For example, a "box" is quite different when it measures salt than when it measures cereal or flour. This is where item-specific units come in. You can define specific units that only apply to individual ingredient items.

1. Click the **Setup** sidebar, located on the left-hand side of your screen, and choose **Ingredient Manager**.
2. Click on an ingredient from your list of ingredient items. (In the example below, rice is the ingredient.)
3. Ensure the **Units** tab (the default) is selected.
4. Click the **Add Unit** button , located in the **Item Specific Units** area on the lower right-hand side of your screen.
Result: A new field displays.
5. Type the new item-specific unit into the Unit Name field. In the example below, the unit name will be Box.
6. Click the down arrow to the right of the Converts To field and choose an option from the list. In our example, we will choose Ounce.
7. Type the quantity into the Qty. field. For our example, we typed 42, indicating the number of ounces.
8. Ensure the **Convert From** and **Convert To** checkboxes have checks in them.

9. Select the new custom unit, Box, from the Procurement Unit (Proc. Unit) drop-down list.
10. Repeat this process with other items that use the box unit, as desired.
Note: The quantity will change depending on the quantity of the new item. For example, the Qty for a box of raisins might be 30 ounces.



Creating General Custom Units

The Unit Builder allows you to build units of measure for ingredients and establish their respective conversion rates.

When working with the Unit Builder, there are three basic concepts to consider:

- Is this a Base Unit, meaning is this unit the smallest unit in which a particular ingredient can be measured (e.g., "slice" of bread)? If the answer is yes, then this unit should be added to Unit Builder, but only to be converted **from**, not converted **to**. Then the user can choose only specific ingredient items to convert from this unit (bread, in this example).
- Is this a larger unit that applies, as defined, to all ingredients? If the answer is no, then it should be added as an item-specific unit to a specific ingredient item (like a "box" added specifically to the ingredient "salt" and another box added specifically to the ingredient "flour").
- Will this unit be returned after the event or will it be consumed/used along with the menu item? If it will be returned, then it should be designated a required item (packing-list item); it should **not** be an ingredient unit.


1. Click the **Administration** ribbon tab > **Lists** > **Unit Builder** to access the Unit Builder.

Result: The Unit Builder window opens.

* Unit Name	Note	Converts To	Qty	←	→	+	-
Kilogram	* Base Unit	Gram	1000	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Pound	* Base Unit	Ounce	16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Ounce	* Base Unit	Gram	28.35	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Gram	* Base Unit			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

* Base Unit: Kilogram

OK Cancel

2. Select the Unit Type from the drop-down list to the right of the Unit Type field.
Note: Three standard measurement Unit Types are available: Volume, Weight, and Quantity. Each unit type has several base units and one lowest base unit (indicated in red font). Each of these units converts into another unit; they therefore cannot be deleted. However, you can add to these units.
3. Click the **Add Record** button , located on the right-hand side of the Unit Builder window.
Result: A new field is added to the bottom of the list.
4. Type the name of the new unit into the field.
5. Click the down arrow to the right of the Converts To field and choose an option from the list.
6. Enter the quantity into the Qty field by determining how many of the unit type converts to the item chosen in the Converts To field. For example, if you added "Drop" as your new unit, and you indicate it takes 20 drops to equal a milliliter, which you entered into your Converts To field, you can divide 1 by 20 to give you the number that should be entered into the Qty field (.05).

Assigning Ingredients to Menu Items

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

- Click the **Menu Manager** button.

Result: The Menu Manager window opens.

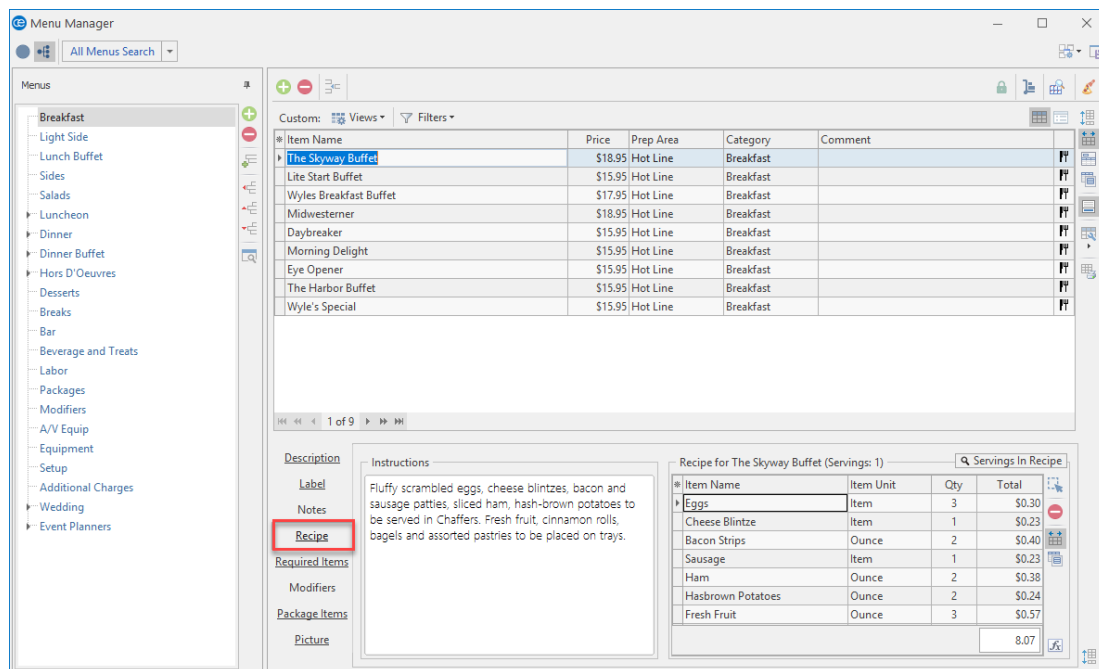
- In the left pane of Menu Manager, click the title of the menu or sub-menu that contains items you want to edit.

Note: Click the expand button to the left of a menu title to access its sub-menus.

- In the main pane of Menu Manager, select the menu item for which you want to create an ingredients menu, or "Recipe."

- Click the **Recipe** tab, located towards the left-hand side of your screen, in the middle.

Tip: You can instantly update the costs of all your menus (and events) whenever the costs of ingredient items change (**Tools > Menu Costing Update > From Ingredients List**).



- Click the **Select Items** button , located on the right-hand side of the window.

Result: The Select Ingredients For Current Recipe window opens.

- Highlight and select items from the main list in the window.

Note: All selected items will be inserted at the bottom of the Ingredients grid of the **Recipe** tab by default, but they can be dragged and dropped into any position.

Printing an Ingredients List

The Ingredients List can be printed from the Event Manager to show all menu items for an order grouped by Prep Area or other option. You can choose to have the groups appear together on one page or on separate pages, for easy distribution.

1. Access the Event Manager by clicking the **Event Manager** button from the **Main** sidebar on the left-hand side of your screen.
2. Search for and retrieve an event in Event Manager.
3. Click the bottom half of the **Prints** button and select **Event Subprints**.
4. Select **Ingredients > Ingredients List**.
Result: A print preview opens.
5. Click the **Print** button, located at the upper left-hand side of the window.

Tip: Modify the Ingredients List in your Miscellaneous Print Designer (**Setup > Miscellaneous Print Designer**). Click the expand button to the left of **Ingredients** and then select **Ingredients List.**)

Ingredients List

Client/Organization	Event Date	Booking Contact	Site Contact	Event #
Acoustics Associates	5/4/2018 (Fri)	Rochelle Grover	Rochelle Grover	E00467
Address 1661 Estess Blvd, Ft. Myers, FL 33931		Telephone (813) 544-8901	Theme Banquet	Guests 100 (Pks)
Party Name Acoustics Associates	Theme Banquet	Category Social	Sales Rep Jolan Smith	

Primary Ingredients

Item Name	Qty	Unit	Conversion	Associated With
Chicken breast	150	Item	12.1 Dozens	Chef's Table Buffet (100)
Chicken Gumbo	200	Fluid Ounce	1.5 Gallons	Chef's Table Buffet (100)
Cole slaw	200	Ounce	12.5 Pounds	Chef's Table Buffet (100)
Potato Salad	200	Ounce	12.5 Pounds	Chef's Table Buffet (100)
Rouxaine lettuce	25	Item	2 Dozens	Chef's Table Buffet (100)
Sage Dressing	300	Ounce	18.75 Pounds	Chef's Table Buffet (100)
Vegetable du Jour	300	Ounce	18.75 Pounds	Chef's Table Buffet (100)
Whipped Potatoes	300	Ounce	18.75 Pounds	Chef's Table Buffet (100)

Sub-Sections

Item Name	Qty	Unit	Conversion	Associated With
Chicken Gumbo	200	Fluid Ounce	1.5 Gallons	Chef's Table Buffet (100)
Sage Dressing	300	Ounce	18.75 Pounds	Chef's Table Buffet (100)

Sub-Recipe Ingredients

Item Name	Qty	Unit	Conversion	Associated With
Apple Cider	56.25	Tablespoon	1.75 Pints	Sage Dressing (100 Ounces)
Butter	14.06	Teaspoon	2.25 Fluid Ounces	Sage Dressing (100 Ounces)
Chicken Soup Base	9.38	Teaspoon	1.5 Fluid Ounces	Sage Dressing (100 Ounces)
Chicken Stock	400	Tablespoon	1.5 Gallons	Chicken Gumbo (100 Fluid Ounces)
Chopped Celery	37.5	Tablespoon	1.25 Pints	Sage Dressing (100 Ounces)
Chopped Onions	18.75	Tablespoon	1.25 Cups	Sage Dressing (100 Ounces)
Chopped Sage	9.38	Teaspoon	1.5 Fluid Ounces	Sage Dressing (100 Ounces)
Cornstarch	100	Teaspoon	1 Pint	Chicken Gumbo (100 Fluid Ounces)
Italian Bread	9.38	Item	4.75 Pairs	Sage Dressing (100 Ounces)
Olive Oil	14.06	Teaspoon	2.25 Fluid Ounces	Sage Dressing (100 Ounces)
Poultry Gumbo	25	Teaspoon	4.25 Fluid Ounces	Chicken Gumbo (100 Fluid Ounces)

Unit 3: Building Required Items Lists

In this section, you will learn:

- Adding a Required Item List Category
 - Adding a Required Item
 - Inventorying Required Items
- Assigning Inventory Out and Inventory Return Times for Required Items
- Assigning a Required Item Cost and Packing Unit
- Assigning Required Items to Food/Service Items
- Printing a Required Items List

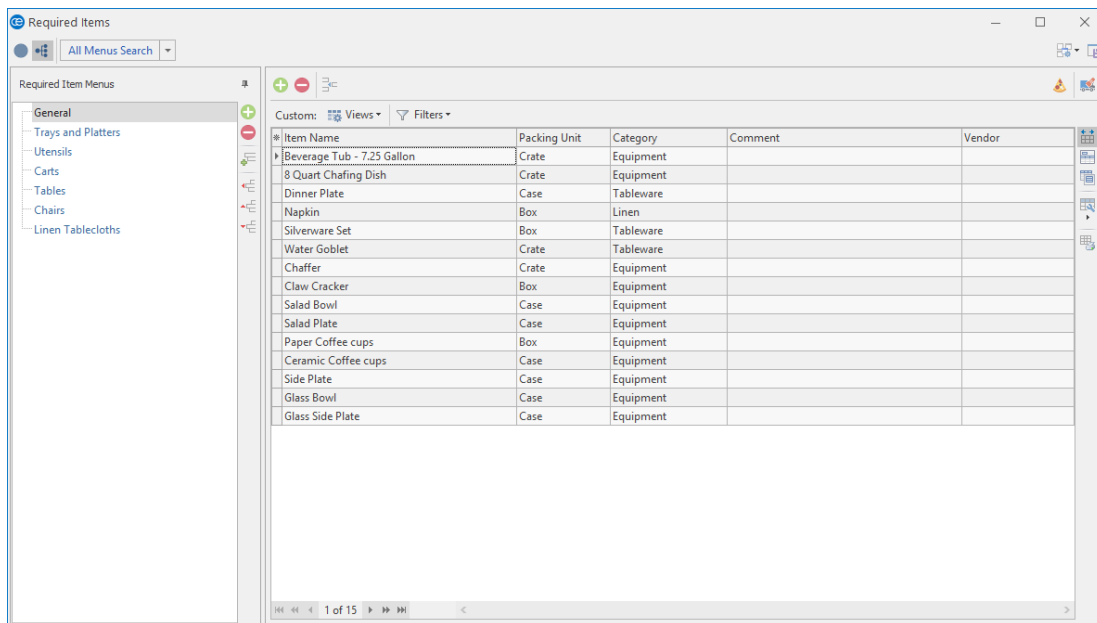
Unit 3: Building Required Items Lists


Building Required Items Lists


In order to select required items for each of your menu items in your default menus, you must first create a master list of Required Items from which to choose. This list can be a combination of multiple lists (and even "sub-lists"), so you can organize ingredient items for easier selection.

Building a Required Items List Category


1. Click the **Setup** sidebar, located on the left-hand side of your screen, and choose **Required Items**.
Result: The Required Items window opens.
Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus > Required Items**.

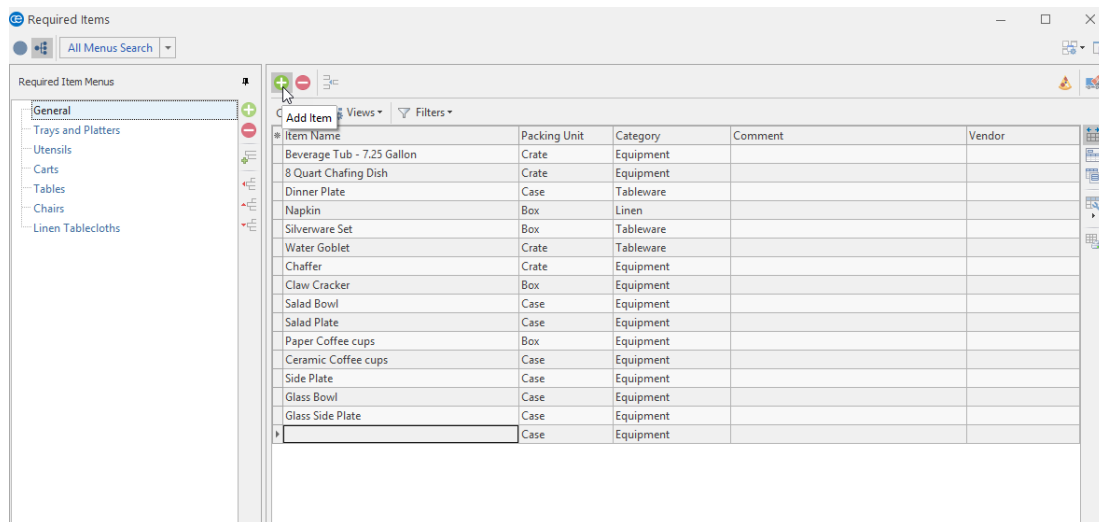


2. Click the **Add Menu** button , located along the left pane of the window, toward the top.
Result: A confirmation prompt appears.
3. Click **Yes**.
Result: A new required items menu is added to the bottom of the list, with your cursor positioned to type a new title.
Note: This button is identical to the **Add Item** button at the top of the Required Items window (as well as the **Add Record** button in the **Home** ribbon tab at the top of the screen); be careful not to confuse them.

4. Type a name for your new required items menu, and press your **[Enter]** key.
Result: Your new list name is saved.
5. **[Optional]** Create a sub-menu of another menu by first selecting a title in the left pane of the window and then clicking the **Add Submenu** button .
Note: You will be prompted to confirm you would like to add a "child menu."
6. Add items to your new list as desired (see topic below).
Note: It is recommended that, when adding items to a new required items list, you take care to set the first item up with the appropriate "Packing Unit," "Category," etc., because each additional item you create will mirror the first in these settings.

Adding a Required Item

1. In the left pane of the Required Items window, click on the title of the menu or sub-menu you want to add an item to.
Note: Click the expand button to the left of a list title to access its sub-lists.
2. Click the **Add Item** button , located at the top of the Required Items window.
Result: A blank line is added to the bottom of the selected list. Drag and drop items into the desired order.
Note: This button is identical to the **Add Menu** button near the left pane of your Required Items window. Take care not confuse them. You can also use the **Add Record** button in the **Home** ribbon tab at the top of your screen.



3. Type an **Item Name** (description), for the new required item into the Item Name field.
4. Press your **[Tab]** or **[Enter]** key.
Result: Your cursor is moved one column to the right, most likely to the **Packing Unit** column.

5. Select a **Packing Unit** (unit of measure) for the required item from the available custom quickpick list or simply type one by hand.

Note: This "Packing Unit" will be the measurement called for when required items are quantified for an event.

6. Press your **[Tab]** or **[Enter]** key.

Result: Your cursor is moved one column to the right, most likely to the **Category** column.

7. **[Optional]** Enter a **Category** to be used for tracking the item by selecting from the available custom quickpick list or by simply typing by hand.

8. Press your **[Tab]** or **[Enter]** key.

Result: Your cursor is moved one column to the right, most likely to the **Comment** column.

9. **[Optional]** Enter up to 50 characters to serve as a more detailed **Comment** for each item.


Tip: If you intend to use the **Packing Unit**, **Category**, or **Comment** fields (as well as other fields shown in the list below), it is highly recommended that you establish these details appropriately for the first item in a new required items list PRIOR to adding additional items. New items default this information from the line you have highlighted when you click the **Add Item** button (Step 2).

Inventorying Required Items

1. Access your list of Required Items by clicking the **Required Items** button from the **Setup** sidebar on the left-hand side of your screen.


2. On the left-hand side of the Required Items Menus list, click the title of the menu containing the required item you would like to inventory.

3. Click into the checkbox in the **Inventory** column to designate the food/service item as "inventory."

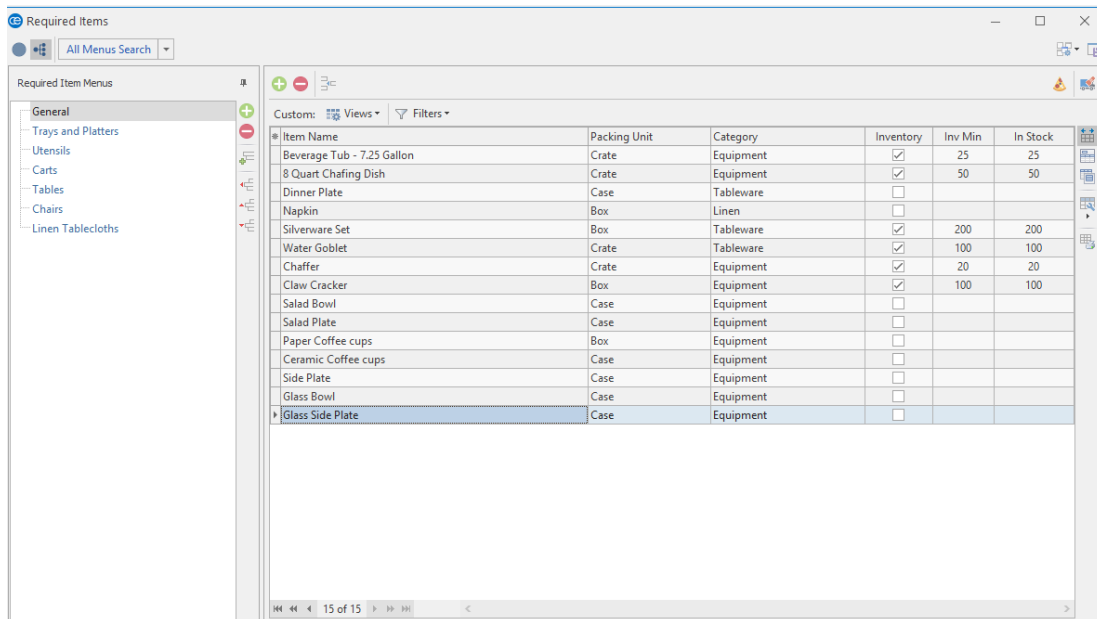
Note: If the **Inventory** column is not displayed by default, use the **Quick Column Customizing tool**  to add this column to your screen display.

4. Type the Inventory Minimum amount into the Inv Min field, and then press **[Tab]** or **[Enter]**.

5. Type the In Stock amount into the In Stock field, and then press **[Enter]**.

Note: If the **Inventory Minimum** and **In Stock** columns are not currently displayed on your screen, retrieve them from your **Quick Column Customizing tool** .

6. Click the **Save Current Window Settings** button  to save this as a default setting every time you open Caterease.




Assigning Inventory Out and Inventory Return Times for Required Items

Tip: Inventory can be applied to required items only if the food/service item is marked as inventory and if the required item is not added on-the-fly.

1. Access the Event Manager by clicking the **Event Manager** button from the **Main** sidebar on the left-hand side of your screen.
2. Search for and retrieve the event for which you want to select inventory items.
3. Click the **Tools** button, located at the top of your screen, and choose **Event Inventory**.
Result: The Event Inventory Items window opens.
Note: You may need to add this button to your menu.

Note: This window only displays items that are marked as “Inventory” in either the Menu Manager or the Required Items Manager.

4. Use the two date/time wheels from the **Inventory Date/Times** pane on the right-hand side of the window to change an item’s Out or Return date/times. (An inventory item's Out and Return times default to the sub-event's From and To date/time.)

Note: The **Linked to Sub-Event Times**  button is pressed if the item is using the default sub-event time. The “Inventory Out” and “Inventory Return” is highlighted in green if it deviates from the sub-event. If you want to change the times, de-select the **Linked to Sub-Event Times** button.

ItemName	Qty	Inventory Out	Inventory Return
Wood Grain Podium	1	3/9/2018 (04:00 pm)	3/9/2018 (09:30 pm)

Inventory Out

February	08	2017	03	59	AM
March	09	2018	04	00	PM
April	10	2019	05	01	

Inventory Return


February	08	2017	08	29	AM
March	09	2018	09	30	PM
April	10	2019	10	31	

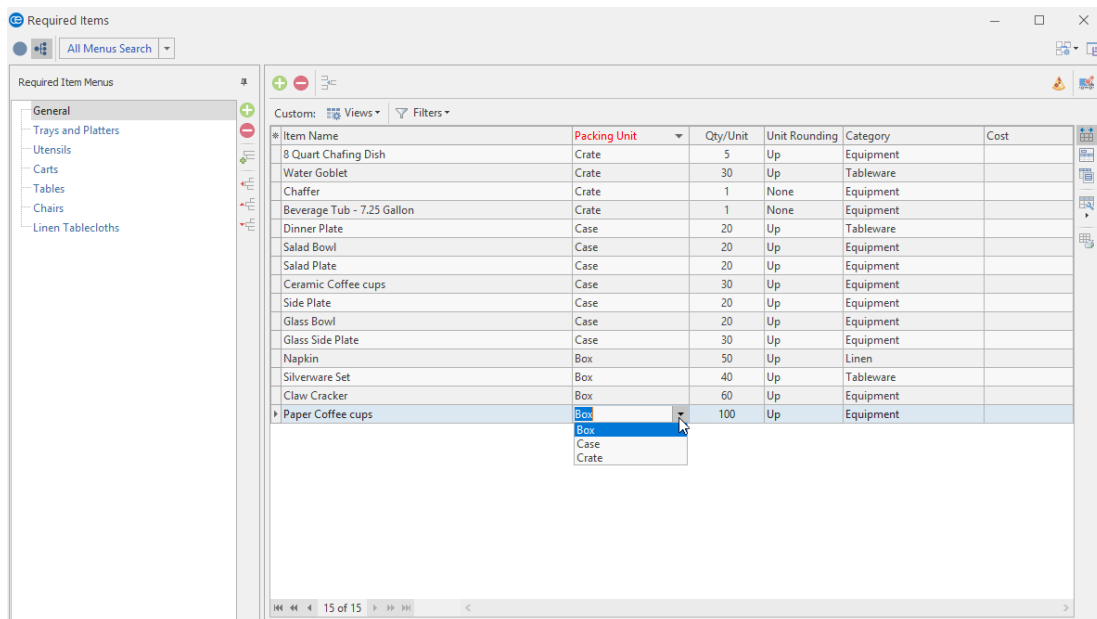
Save Cancel Close

- When finished making your changes, click the **Save** button, then click the **Close** button.
- Double-click the inventory item to select it.
Result: The item will display in the Food/Service Item Details View window.

Assigning a Required Item Cost and Packing Unit


You can associate Packing Units and Cost to Required Items in your Required Items list and those units, and associated costs will be pulled into an event you create in Event Manager.

- Access your list of Required Items by clicking the **Required Items** button from the **Setup** sidebar on the left-hand side of your screen.
- Click the **Quick Column Customizing** button , located at the top left of the grid on the **Required Items** tab, to the left of **Item Name**.
Result: A drop-down list of optional columns appears.
- Click into the checkboxes to the left of **Cost** and **Packing Unit**.
Result: The **Cost** and **Packing Unit** columns will display in the Required Items grid.



4. Enter a Packing Unit into the Packing Unit field or select an available option by clicking the down arrow to the right of the field.
Note: This field, which offers a customizable quickpick list of available options, allows you to categorize required items for tracking purposes.

5. Enter a Cost into the Cost field.

6. If you want the new columns you've selected to be displayed in the **Required Items** grid as a default, click the **Save Current Window Settings** button  at the top right of the Required Items window.

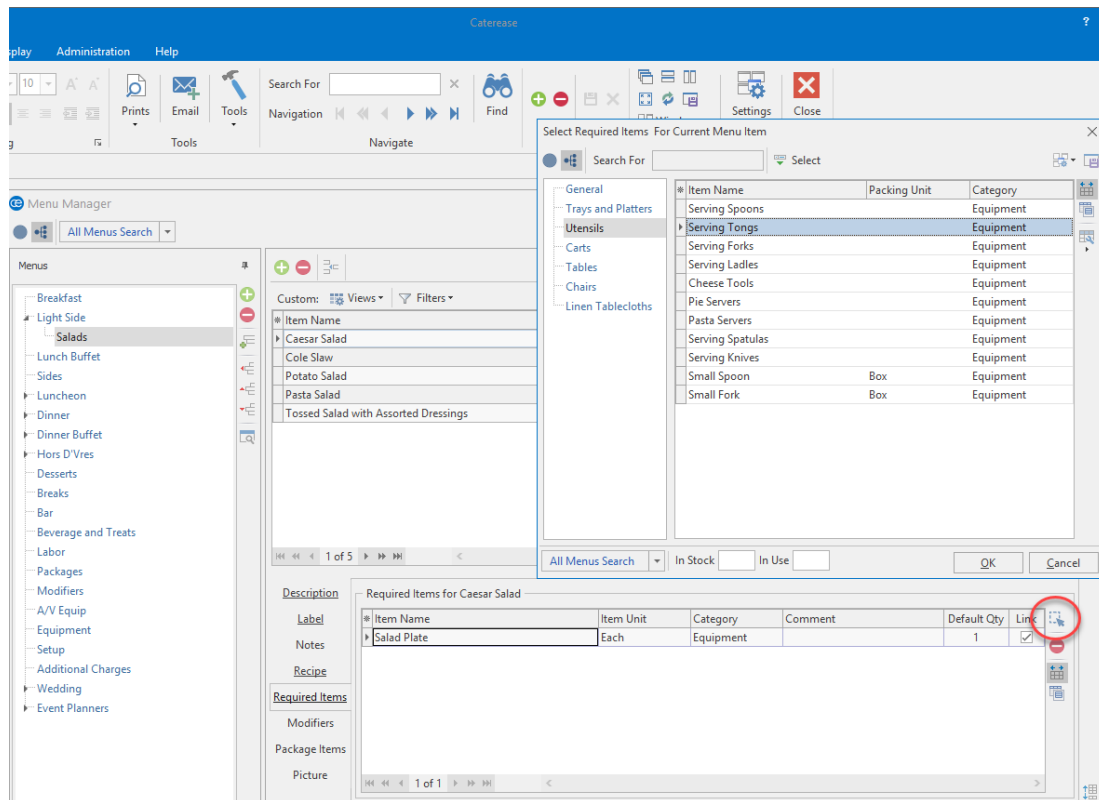
Tip: You might find it useful to enable the **Qty/Unit** and **Unit Rounding** fields in addition to the **Packing Unit** and **Cost** fields.

Assigning Required Items to Food/Service Items

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).
Result: The Menu Manager window opens.
2. In the left-hand pane of Menu Manager, click on the title of the menu or sub-menu that contains items you want to edit.
Note: Click the expand button to the left of a menu title to access its sub-menus.
3. In the main pane of Menu Manager, select the menu item to which you want to add required items.
4. Click the **Required Items** tab.

5. Click the **Select Items** button , located on the right-hand side of your screen.

Result: The *Select Required Items For Current Menu Item* window opens.



6. Highlight and select items in one of the following ways:

Note: All selected items will be inserted at the bottom of the *Required Items* grid by default, but can be dragged and dropped into any position.

- Double-click on a single item.
Result: That item is inserted into the **Required Items** grid, and the *Select Required Items For Current Menu Item* window remains open.
- Hold your mouse button down on one individual item (without moving) and drag that item from the *Select Required Items For Current Menu Item* window onto the **Required Items** grid.
Result: The item is inserted in the **Required Items** grid, and the *Select Required Items For Current Menu Item* window remains open.
- Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them onto the **Required Items** grid.
Result: The items are inserted into the **Required Items** grid, and the *Select Required Items For Current Menu Item* window remains open.
- Click the **Drop Selected Items** button at the top left of the *Select Required Items For Current Menu Item* window.

Result: Any highlighted items are inserted into the **Required Items** grid, and the *Select Required Items For Current Menu Item* window remains open.

- Click **OK**.

Result: Any highlighted items are inserted into the **Required Items** grid, and the *Select Required Items For Current Menu Item* window closes.

7. Enter an Item Unit into the Item Unit field. The item unit allows you to track a unit of purchase for each item and its associated unit.
8. Press **[Tab]** or **[Enter]** to move to the next field, the Category field.
9. Enter a Category into the Category field or select an available option by clicking the down arrow to the right of the field.
Note: This field, which offers a customizable quickpick list of available options, allows you to categorize required items, for tracking purposes.
10. Press **[Tab]** or **[Enter]** to move to the next field: the Default Qty field.
11. Enter a Default Qty for your required items.
Note: This is the default quantity of this item required for each order of this menu item, and will be automatically multiplied times the number of menu items ordered for an event (unless the **Link** checkbox is empty, as described below).
12. **[Optional]** Add or remove a check from the **Link** checkbox, optionally linking the quantity of this item to the number of corresponding menu items ordered in an event.
Note: With this box checked, the Default Qty entered in Step 11, above, will be multiplied by the quantity of this corresponding menu item ordered for an event. With the box empty, the Default Qty entered above will remain the quantity for any event (unless changed in the event itself).

Printing a Required Items List

You can print a Required Items List (Packing List) with specific grouping details, such as Category, Vendor, etc.

1. Access the Event Manager by clicking the **Main** sidebar item from the left-hand side of your screen, then clicking the **Event Manager** button.
2. Use the Search tools to find an existing event for which you want to print a required items list.
3. Click the bottom half of the **Prints** button at the top of the Caterease screen.
4. Select **Event Subprints > Required Item List**.
Result: A print preview opens.
5. Click the **Print** button.
6. **[Optional]** Click the **Email** button to e-mail a copy of the print.

Tip: Modify this print by clicking **Setup > Miscellaneous Print Designer >** and clicking **Required Item List**.

Required Item List

flavours
CATERING + EVENTS

Client/Organization Acoustics Associates	Event Date 5/4/2018 (Fri)	Booking Contact Rochelle Grover	Site Contact Rochelle Grover	Event # E00467
Address 1661 Estero Blvd, Ft. Myers, FL 33901		Telephone (813) 544-8961	Theme Banquet	Guests 100 (Pls)
Party Name Acoustics Associates	Theme Banquet	Category Social	Sales Rep John Smith	

Item Name	Qty	Item Unit	Qty	Packing Unit	Category	Associated With
1 Quart Chilling Dish	4	Each	1	Crate	Equipment	100- Chef's Table Buffet
Dinner Plate	100	Each	5	Case	Tableware	100- Chef's Table Buffet
Napkins	100	Each	2	Box	Linen	100- Chef's Table Buffet
Silverware Set	100	Each	3	Box	Tableware	100- Chef's Table Buffet

Unit 4: Managing Vendor Lists

In this section, you will learn:

- Adding New Default Vendors
- Assigning Vendors to Food/Service Items
- Assigning Vendors to Ingredients
- Changing Vendors in an Event
- Printing Food/Service Item Vendor Lists


Unit 4: Managing Vendor Lists


Creating Default Vendor Lists

With Caterease, you can keep track of vendors that provide various ingredients or even food/service line items (food, rental equipment, etc.), that you order for your events.



Adding New Default Vendors

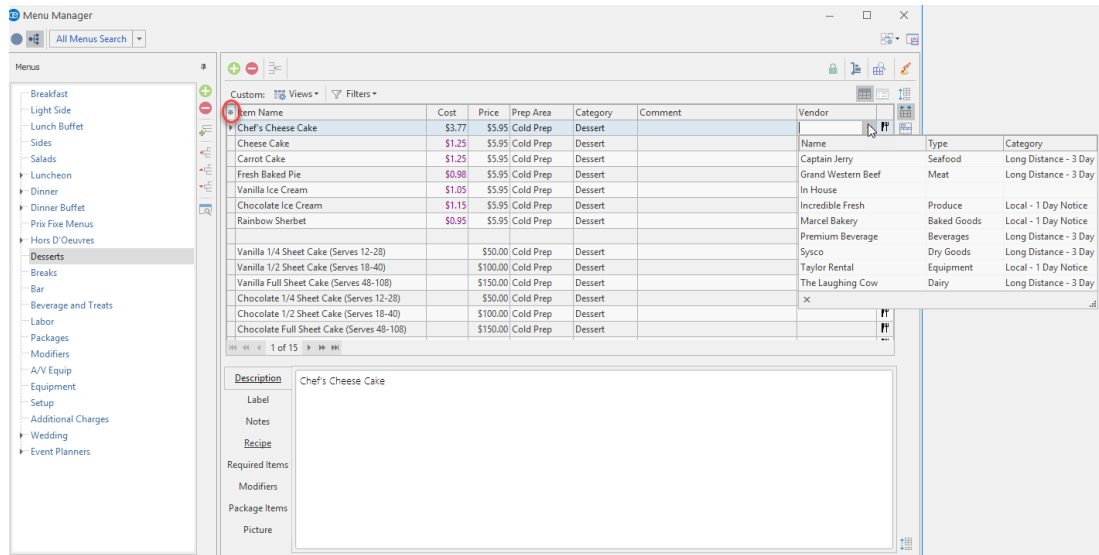
1. Click the **Setup** sidebar, located on the left-hand side of your screen, and choose **Vendor List**.
Result: The *Vendor List* window opens.

2. Click the **Add Record** button , located in the main toolbar (**Home** ribbon tab) at the top of your screen.
Result: A confirmation prompt appears.
3. Click **Yes**.
Result: A New Vendor field is added to the list, with your cursor positioned to type a new name.
4. Type a name for your new vendor into the **Name** field, then press your **[Tab]** or **[Enter]** key.
Result: Your cursor moves to the next field (Address).
5. Continue to enter additional information into each field, using your **[Tab]** or **[Enter]** key to move from one field to the next.



6. **[Optional]** Click the **Description** tab at the bottom of the window and enter a brief description of the vendor into the text box.
7. **[Optional]** Click the **Notes** tab at the bottom of the window and enter some general notes about the vendor into the text box.
8. **[Optional]** Click the **Directions** tab at the bottom of the window and enter directions to the vendor location into the text box.
9. **[Optional]** Click your right mouse button anywhere in the **Picture** text box and choose **Load From File** to associate a digital image with the vendor.
10. Repeat Steps 2 through 9 as desired to add additional vendors.
11. Click the **Save Changes** button , located in the **Home** ribbon tab.

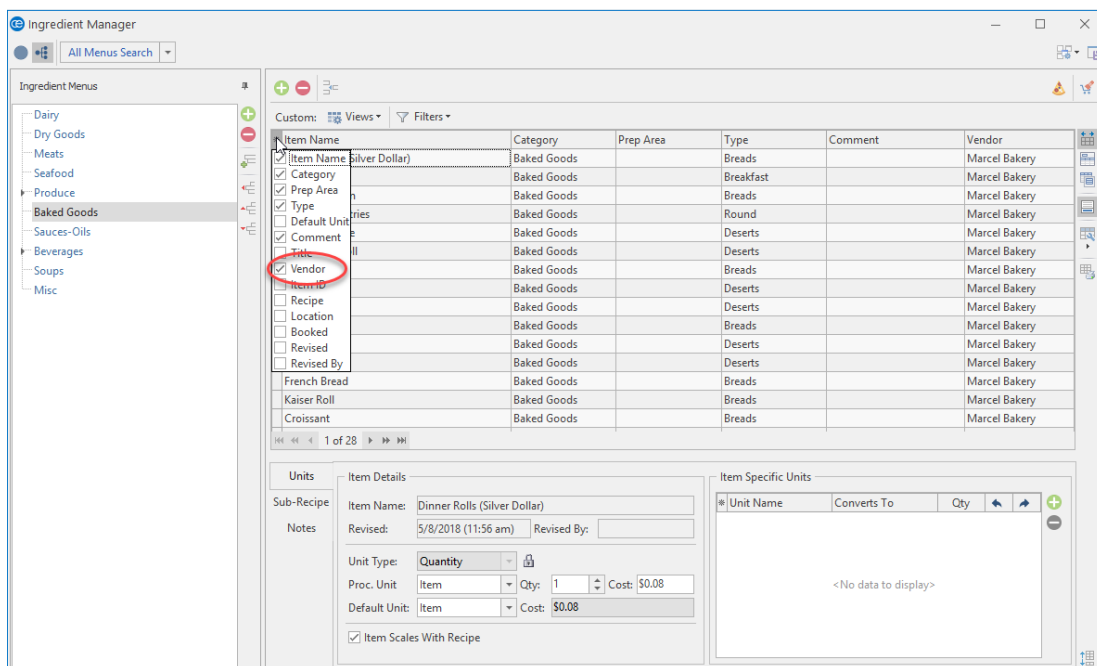
Assigning Vendors to Menu Items

1. Click the **Menu Manager** button from the **Setup** sidebar.
Result: *The Menu Manager window opens.*
2. In the left-hand pane of Menu Manager, click on the title of the menu or sub-menu to which you would like to add a vendor.
3. In the main pane of Menu Manager, select the food/service item to assign to which you would like to assign the vendor.
4. Click the **Quick Column Customizing** button , located to the left of the **Item Name** column.
5. Click into the **Vendor** checkbox to add the **Vendor** column to your screen display.
6. Click the down arrow to the right of the Vendor field and select an option from your default list.
7. Click the **Save Current Window Settings** button  to save this as a default setting every time you open Caterease.




Assigning Vendors to Ingredients

1. Click the **Ingredient Manager** button from the **Setup** sidebar.
Result: The *Ingredient Manager* window opens.
2. In the left pane of Ingredient Manager, click the title of the ingredient menu or sub-menu to which you would like to add a vendor.
3. In the main pane of Ingredient Manager, select the food/service item to which you would like to assign the vendor.
4. Click the **Quick Column Customizing** button , located to the left of the **Item Name** column.
5. Click into the **Vendor** checkbox to add the **Vendor** column to your screen display.
6. Click the down arrow to the right of the **Vendor** column and select an option from your default list.
7. Click the **Save Current Window Settings** button  to save this as a default setting every time you open Caterease.



Changing Vendors in 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 **Quick Column Customizing** button , located to the left of the **Item Name** column.
Result: A drop-down list of optional columns appears.
3. Click into the checkbox to the left of the word **Vendor**.
Result: The **Vendor** column is added to the Food/Service grid.

4. Click into the Vendor field and select an option from the list.

Go To 9/7/2018

Event Details

Client/Organization	USA Cup	Subtotal	\$2,782.50
Address	11317 Marty	Serv Chg	\$442.32
	Ft. Myers, FL 55414	Tax	\$276.45
Telephone	(612) 658-5599	Total	\$3,501.27
Email		Cost Per Guest	\$28.46

Event SubEvent

Description	Date	Start	End	Setup Style	Banquet Room
Dinner Buffet	7/31/2018 (Tue)	06:00 PM	01:00 AM	Rounds	Ocean

#	Item Name	Vendor	Price	Qty	Total	Type
	+++Cash Bar In Room+++		\$100.00	10	\$1,000	
	Royal Buffet		\$12.95	10	\$129.5	
	Double Fudge Chocolate Cake				\$0.00	

Name	Type	Category
Captain Jerry	Seafood	Long Distance - 3 D
Grand Western Beef	Meat	Long Distance - 3 D
In House		
Incredible Fresh	Produce	Local - 1 Day Notice
Marcel Bakery	Baked Goods	Local - 1 Day Notice
Premium Beverage	Beverages	Long Distance - 3 D
Sysco	Dry Goods	Long Distance - 3 D
Taylor Rental	Equipment	Local - 1 Day Notice
The Laughing Cow	Dairy	Long Distance - 3 D
Katies Flowers		

Description Double Fudge Choco

Printing Food/Service Item Vendor Lists

Each food/service item (or ingredient item) can have a specific vendor associated with it, and you can generate a detailed Vendor List print for each party to provide those vendors with their responsibilities.

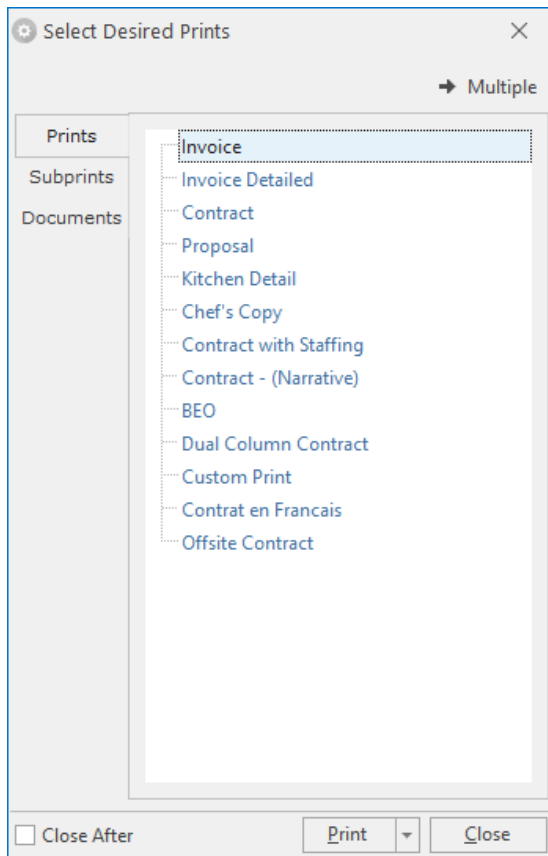
Generating the Vendor List Print

1. Click the top portion of the **Prints** button, located on the **Home** ribbon tab at the top of your screen.

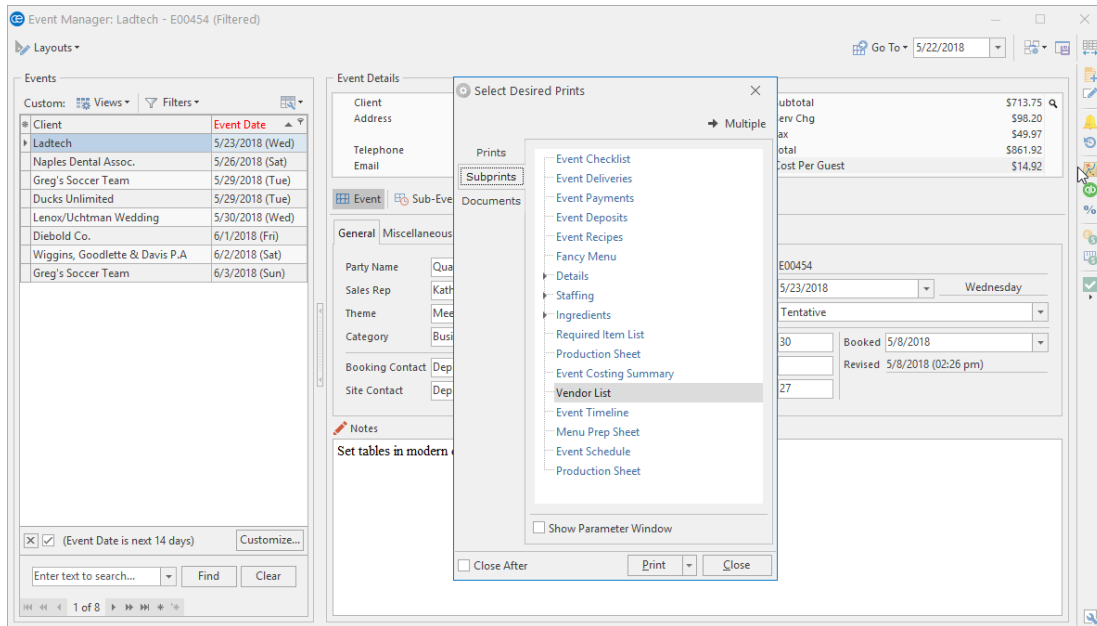
Result: The *Select Desired Prints* window opens.

Note: This print can also be accessed by clicking the bottom portion of the *Prints* button and choosing **Event Subprints > Vendor List**.

Tip: This print can be modified using your *Miscellaneous Print Designer*.



2. Click the **Sub-Prints** tab.
3. Double-click **Vendor List**.



4. From the print preview screen which displays, click the **Print** button.
Result: The print is sent to your default printer.

Unit 5: Working with the Menu Manager Tabs

In this section, you will learn:

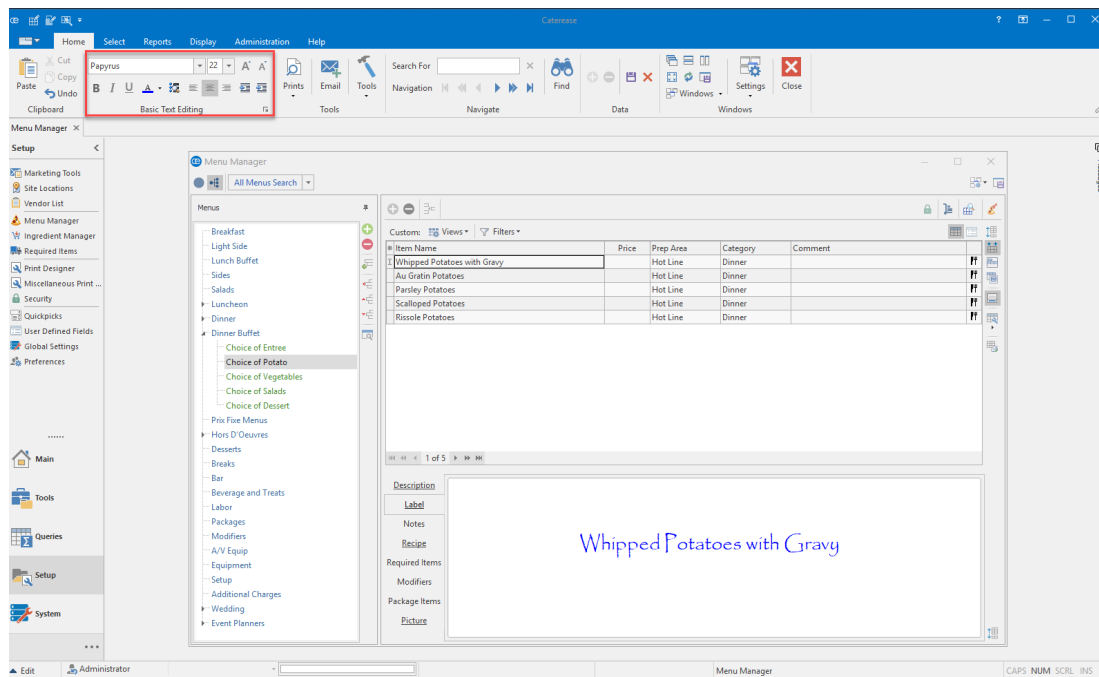
- Printing Food/Service Item Labels and Display Cards
- Using the Recipe Tab: Adding Ingredients to a Menu Item
 - Editing Additional Ingredient Item Details
 - Establishing Food/Service Item Modifiers
 - Selecting Modifiers for a Menu Item
 - Creating Automatic Food/Service Item Packages
- Including Digital Images of Your Food/Service Items
 - E-mailing an Image


Unit 5: Working with the Menu Manager Tabs

Printing Food/Service Item Labels and Display Cards

This feature allows you to create custom labels for the menu items necessary for an event. Additionally, you can generate cards to display on a table, to identify the items for the guests. With Caterease, you can generate these labels or menu cards instantly from any party.

1. In the Menu Manager, select a menu item for which you would like to create a label/menu card.
2. Click the **Label** tab.
3. Type default text to appear on the labels/menu cards.
Note: Press your **[Enter]** key to include space above the text, so the text appears more centered on the label or menu card.
4. Use the font-formatting tools, located in the **Basic Text Editing** section at the top of your screen, to choose a font style, font size, font color, etc. You can also center or right/left-justify text.

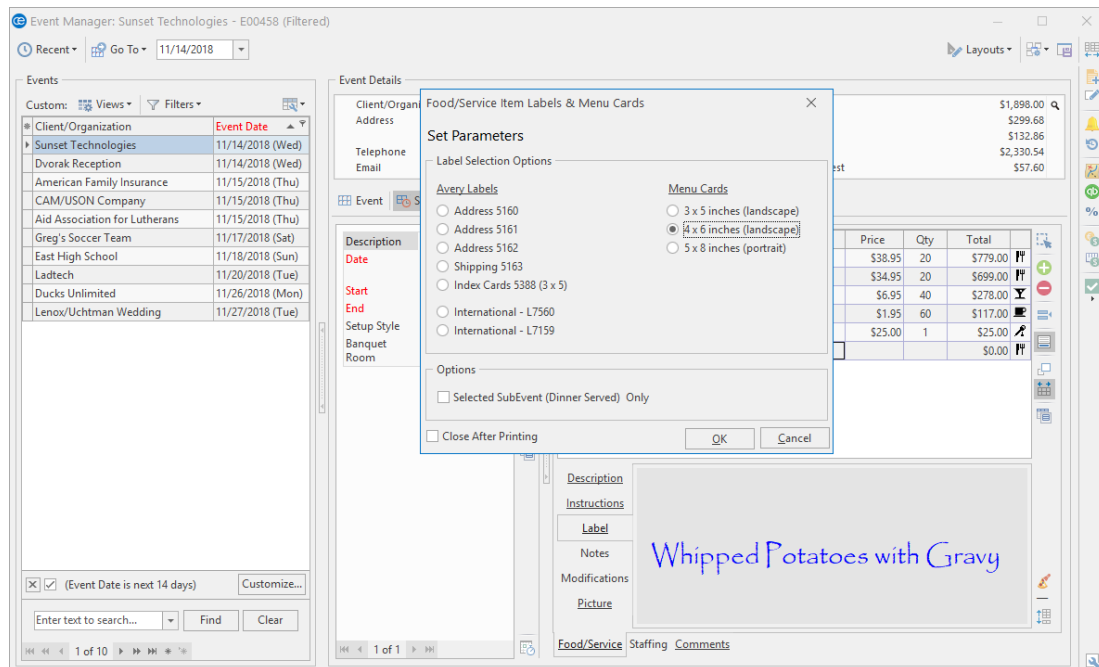


5. Open an event in Event Manager.
6. From the Sub-Event display, click the **Select Menus** button  to select the items from your default menus.
7. Click the bottom portion of the **Prints** button, located at the top of your screen.

8. Click the **General** button and choose **Labels & Menu Cards**.
9. Choose from among several Avery pre-formatted labels by clicking the appropriate radio button in the **Avery Labels** section.
10. Choose from among available menu cards by clicking the appropriate radio button in the **Menu Cards** section.
11. Click **OK**.

Result: A Print Preview of all of the food/service items in the selected sub-event display.

Note: If you have more than one sub-event, you can choose to print labels/menu cards for only the selected sub-event by clicking into the **Selected SubEvent** checkbox.



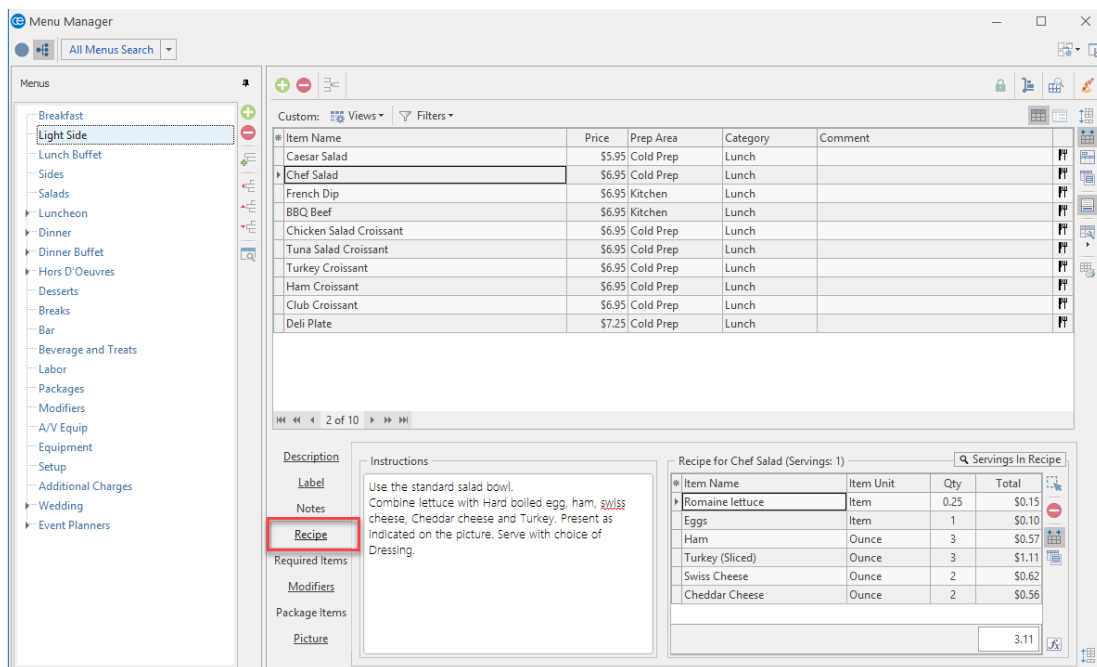
Tip: You can edit the label/menu card on-the-fly, within the event.

Using the Recipe Tab

Each menu item in your default menus can have a list of ingredients attached to it. When a menu item is retrieved into an event, the corresponding ingredients are not only retrieved, but also totaled up, based on the quantity given to the menu item in the event. Note: You must first before you can attach them to a menu item as described here.

Adding Ingredients to a Menu Item

1. Click the **Setup** sidebar on the left-hand side of your screen.
2. Click the **Menu Manager** button.
Result: The Menu Manager window opens.
Note: As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Menu Manager**.
3. In the left pane of Menu Manager, click on the title of the menu or sub-menu that contains items you want to edit.
Note: Click the expand button to the left of a menu title to access its sub-menus.
4. In the main pane of Menu Manager, select the menu item for which you want to create an ingredients menu, or "Recipe."
5. Click the **Recipe** tab, located towards the left-hand side of your screen, in the middle.



6. Click the **Select Items** button , located on the right-hand side of the window.
Result: The Select Ingredients For Current Recipe window opens.

- Highlight and select items from the main list in the window in one of the following ways:


Note: All selected items will be inserted at the bottom of the **Ingredients** grid of the **Recipe** tab by default, but can be dragged and dropped into any position.

- Double-click on a single item.
Result: That item is inserted into the **Ingredients** grid, and the Select Ingredients For Current Recipe window remains open.
- Hold your mouse button down on one individual item (without moving) and drag that item from the Select Ingredients For Current Recipe window into the **Ingredients** grid.
Result: The item is inserted into the **Ingredients** grid.
- Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them into the **Ingredients** grid.
Result: The items are inserted into the **Ingredients** grid.
- Click the **Drop Selected Items** button at the top left of the Select Ingredients For Current Recipe window.
Result: Any highlighted ingredient items are inserted into the **Ingredients** grid, and the Select Ingredients For Current Recipe window remains open.
- Click **OK**.
Result: Any highlighted ingredient items are inserted into the **Ingredients** grid, and the Select Ingredients For Current Recipe window closes.

- Click into the **Item Unit** column and make any changes to the default Item Unit, if necessary.

- Click into the **Qty** column and enter a quantity for each ingredient item.


Editing Additional Ingredient Item Details

- Click the **Quick Column Customizing** button , located to the left of the Item Name field, in the **Ingredients** grid.

Result: A drop-down list of optional columns appears (see table below).

- Click into the checkbox next to any column heading to have that column appear in the grid.

Result: Any columns with checks next to them appear in the grid.

Note: The **Automatically Set Column Widths** button  at the right-hand side of the **Ingredients** grid is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.

Tip: If you want the new columns you've selected to be displayed in the **Ingredients** grid as a default, click the **Save Current Window Settings** button at the top right of the Menu Manager window.

Recipe for Chef Salad (Servings: 1)

Servings In Recipe: 1

Item Name	Item Unit	Qty	Total
<input checked="" type="checkbox"/> Item Name	Item	0.25	\$0.15
<input type="checkbox"/> Category	Item	1	\$0.10
<input checked="" type="checkbox"/> Item Unit	Ounce	3	\$0.57
<input type="checkbox"/> Vendor	Ounce	3	\$1.11
<input type="checkbox"/> Prep Area	Ounce	2	\$0.62
<input type="checkbox"/> Comment	Ounce	2	\$0.56
<input type="checkbox"/> Scalable			
<input type="checkbox"/> Required Item			
<input checked="" type="checkbox"/> Qty			3.11
<input type="checkbox"/> Cost			
<input checked="" type="checkbox"/> Total			


3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
Note: You can also drag column headings left and right in the grid itself.
4. Enter information into the new fields as described below.

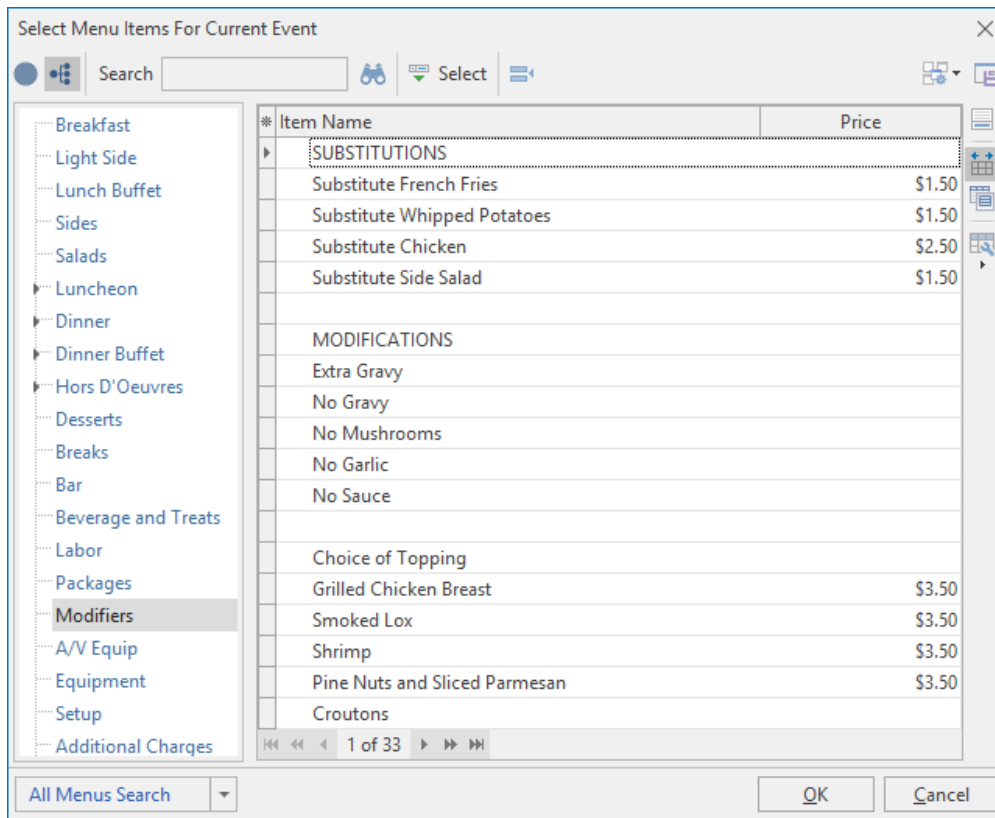
Field	Description
Item Name*	Identifies the ingredient item.
Category	Allows you to categorize ingredient items for tracking purposes; offers a customizable quick-pick list of options.
Item Unit*	Identifies the unit of purchase for the ingredient item.
Vendor	Identifies a vendor responsible for providing the ingredient item.
Prep Area	Identifies the department, person, or area responsible for preparing the item.
Comment	Allows up to 50 characters of general comment about an ingredient item.
Scalable	If an item is "scalable," the actual amount of the ingredient is derived from the servings of a particular recipe.
Required Item	Indicates if an ingredient item has been designated as a required item for a recipe.
Qty*	Indicates the quantity of the ingredient item necessary for one portion of the current menu item.
Cost	Indicates the cost of the menu item; can be directly typed into the field, or can be automatically calculated as a sum of ingredient item costs.
Total*	Multiplies the cost of the ingredient item times its quantity (above) to calculate the total cost of the ingredient item for each portion of this menu item.
* Displayed on the grid by default.	

Establishing Food/Service Item Modifiers

You can assign modifiers to your various menu items, and these modifiers can be optionally retrieved with those items when building a menu for an event. Examples might include the menu item "Caesar Salad" with the optional modifiers of "Chicken" or "Salmon," or a sandwich menu item with modifiers to identify bread or cheese choices, etc. (Modifiers can optionally have additional prices associated with them.)

Creating Modifiers for a Food/Service Item


1. Click the **Setup** sidebar on the left-hand side of your screen and click **Menu Manager**.
Result: *The Menu Manager window opens.*
Note: *As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus > Menu Manager**.*
2. Add modifier items to your default menus, as you would any menu item so they can be selected as "modifiers" in Step 6, below.
Note: *"Modifiers" are simply menu items attached to another item, and thus must exist somewhere in your default menus. You might create a separate menu entitled "Modifiers" to store all of these items.*
3. In the left-hand pane of Menu Manager, click on the title of the menu or sub-menu that contains items you want to edit.
Note: *Click the expand button to the left of a menu title to access its sub-menus.*
4. In the main pane of Menu Manager, select the menu item to which you want to add modifiers.
5. Click the **Modifiers** tab.
6. Click the **Select Items** button , located at the right-hand side of the **Modifiers** grid.
Result: *The Select Menu Items For Current Event window opens.*
7. In the left pane of the Select Menu Items For Current Event window, click on the title of the menu where your modifier items are stored.

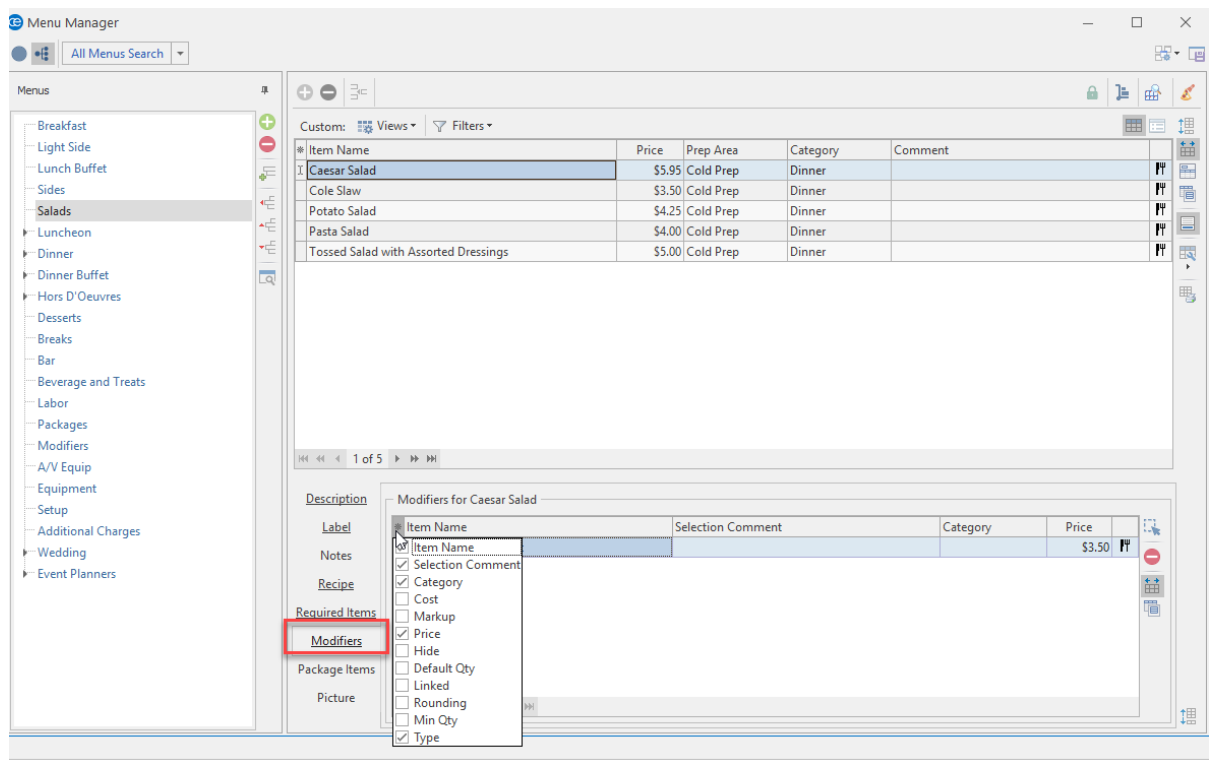


8. Highlight and select items in one of the following ways:

Note: All selected items will be inserted at the bottom of the **Modifiers** grid by default, but can be dragged and dropped to any position.

- Double-click a single item.
Result: That item is inserted in the **Modifiers** grid, and the Select Menu Items For Current Event window remains open.
- Hold your mouse button down on one individual item (without moving) and drag that item from the Select Menu Items For Current Event window onto the **Modifiers** grid.
Result: The item is inserted in the **Modifiers** grid.
- Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them onto the **Modifiers** grid.
Result: The items are inserted into the **Modifiers** grid.
- Click the **Select Items** button at the top left of the Select Menu Items For Current Event window.
Result: Any highlighted items are inserted in the **Modifiers** grid, and the Select Menu Items For Current Event window remains open.
- Click **OK**.
Result: Any highlighted items are inserted into the **Modifiers** grid, and the Select Menu Items For Current Event window closes.

9. **[Optional]** Enter a Selection Comment for your modifiers by typing into the Selection Comment field.
Note: This comment can be used as a hint when selecting items for an event; examples might include "Choose One," "Per Person," etc.
10. **[Optional]** In the Price field, add or remove a price to be associated with the modifier.
Note: This price will be retrieved with the modifier when it is selected into an event, and will default to the price applied when the modifier was added to your menus (Step 2, above).
11. Click the **Quick Column Customizing** button , located at the top left of the grid on the **Modifiers** tab.
Result: A drop-down list of optional columns display (see table below).
12. Click the checkbox next to any column heading to have that column appear in the grid.
Result: Any columns with checks next to them appear in the grid.




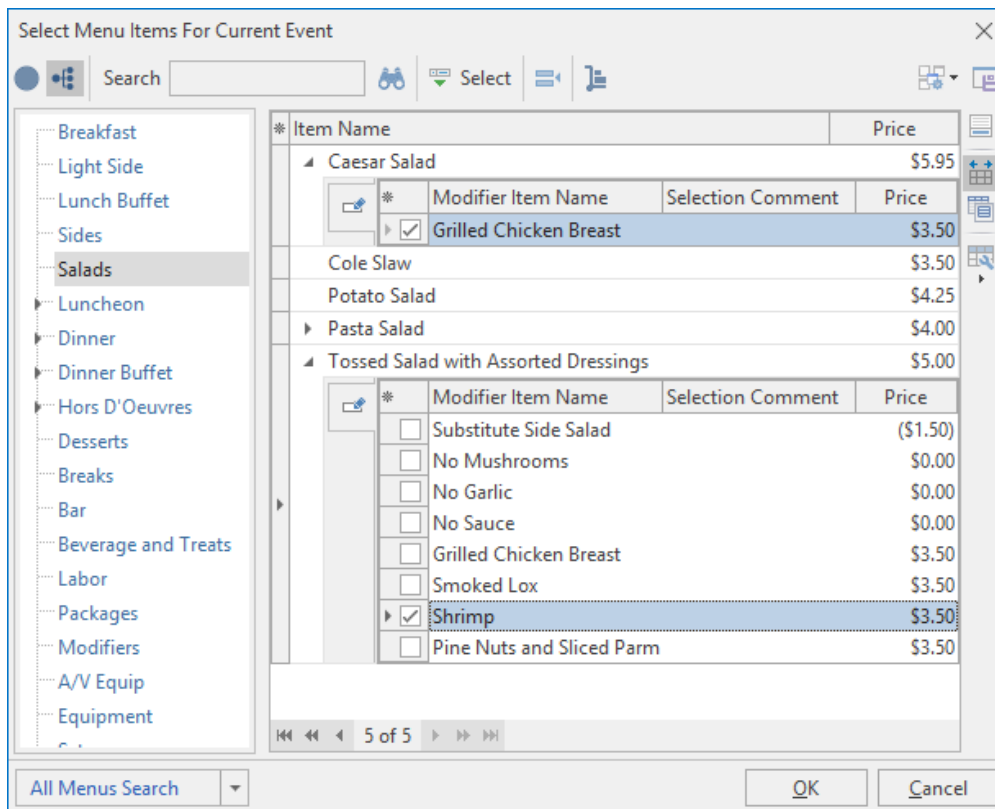
13. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
Note: You can also drag column headings left and right in the grid itself.
14. Enter information into the new fields as described below.

Field	Description
Item Name*	Identifies the modifier item.
Selection Comment*	Can be used as a hint when selecting items for an event; examples might include "Choose One," "Per Person," etc.
Category	Allows you to designate a modifier category for each modifier. Examples might include "Substitutions," "Vegan," etc.

Field	Description
Cost	Indicates the cost of the item; will default to cost applied to modifier item when it was setup
Markup	Multiplies by the item cost (above) to automatically calculate the Price (below); a "10%" markup would be entered as "1.1" (Cost X 1.1 = Price)
Price*	Indicates the price of the modifier.
Hide	Offers a checkbox, allowing you to hide this item by default on event prints that are set to allow item hiding; achieves the purpose of "passing notes" to the kitchen or other back-of-house staff.
Default Qty	Allows you to establish a default quantity for the item when pulled into an event; can be used in conjunction with "Linked" below to calculate a quantity per guest (e.g., a Default Quantity of "3" for each guest attending the event).
Linked	Offers a checkbox, allowing you to link the quantity of this item to the guest count of an event as a default.
Rounding	Used in conjunction with the two options above to avoid partial quantities; e.g., a pastry with the Default Quantity of "1.5" which is also Linked to the guest count for a party of 25, will default a quantity of "37.5" pastries. In this case you might round it "Up."
Min Qty	Allows you to establish a minimum quantity for an item when it is selected into an event.
Type*	Allows you to categorize items as being "Food," "Beverage," "Liquor," "Equipment," "Labor," "Room" or "Other"; will default to cost applied to modifier item when it was set up.
* Displayed on the grid by default.	

Selecting Modifiers for a Menu Item

1. Search for and retrieve an event in Event Manager.
2. Click the **Sub-Event** button, located next to the **Event** button on the left-hand side of your screen.
Result: *The Event Manager changes to the Sub-Event Display.*
3. From the Food/Service tab, click the **Select Items** button  , located at the right-hand side of the window.
Result: *The Select Menu Items For Current Event window opens.*
4. Click the expand button to the left of the menu item to which you plan to add modifiers.
5. Click into the checkbox next to each modifier you would like to add.



6. When finished, click **OK**.
Result: *Each modifier displays, in italic and with color indicators, on the Food/Service grid in your Event Manager.*

Creating Automatic Food/Service Item Packages

If you have food/service items you often sell together, you can combine them into an automatic menu "package." This way, you simply select the package itself, and Caterease will automatically locate and compile all of the various items in their separate menus.

Adding Package Items to a Food/Service Item

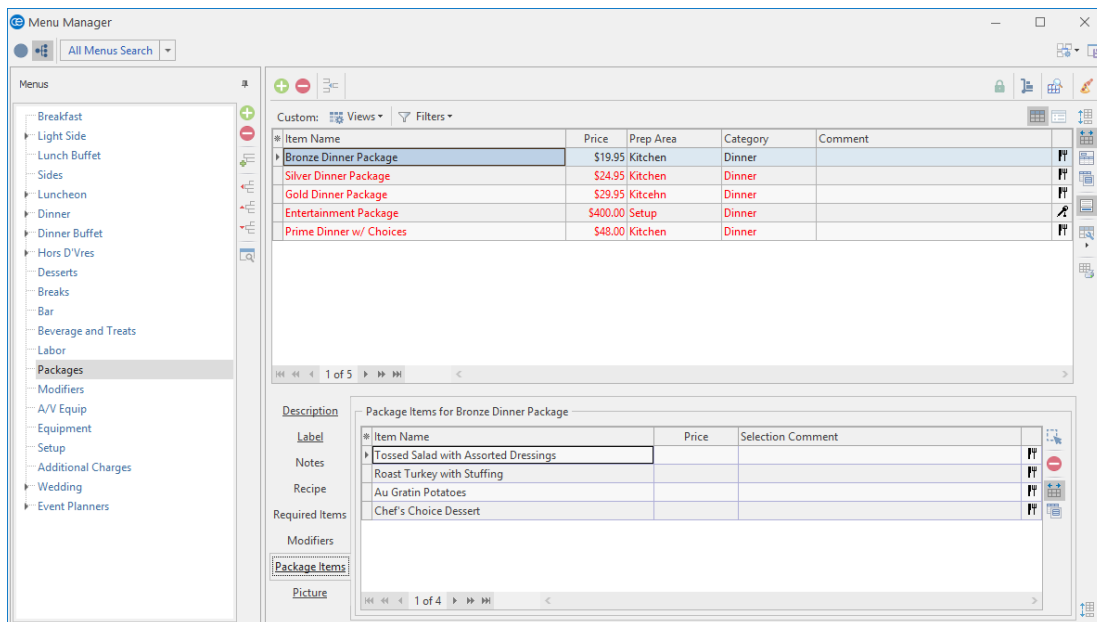
1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

Result: The Menu Manager window opens.

2. Select the menu item you want to use as your package, or add a new item.

Note: You must first choose an item to act as your package, then connect associated items to it.

3. Click on the **Package Items** tab, located toward the bottom of the Menu Manager.



4. Click the **Select Items** button , located at the right-hand side of the **Package Items** grid.

Result: The Select Menu Items For Current Event window opens.

5. In the left pane of the Select Menu Items For Current Event window, click on the title of a menu where your package items are stored.

6. Highlight and select items in one of the following ways:

Note: All selected items will be inserted at the bottom of the **Package Items** grid by default, but can be dragged and dropped into any position.

- Double-click a single item.

Result: That item is inserted into the **Package Items** grid, and the Select Menu Items For Current

Event window remains open.

- Hold your mouse button down on one individual item (without moving) and drag that item from the Select Menu Items For Current Event window into the **Package Items** grid.

Result: *The item is inserted into the **Package Items** grid and the Select Menu Items For Current Event window remains open.*

- Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them into the **Package Items** grid.

Result: *The items are inserted into the **Package Items** grid and the Select Menu Items For Current Event window remains open.*

- Click the **Select Items** button at the top left of the Select Menu Items For Current Event window.

Result: *Any highlighted items are inserted into the **Package Items** grid, and the Select Menu Items For Current Event window remains open.*

- Click **OK**.

Result: *Any highlighted items are inserted into the **Package Items** grid, and the Select Menu Items For Current Event window closes.*

7. **[Optional]** Add or remove a price to be associated with the package item by typing into the Price column.

Note: *This price will be retrieved with the package when it is selected into an event, and will default to the price applied when the package item was added to your menus.*

8. Press your **[Tab]** or **[Enter]** key to move to the next field, most likely the Selection Comment field.

9. **[Optional]** Enter a Selection Comment for your package items.

Note: *This comment can be used as a hint when selecting items for an event; examples might include "Package Portion," "Per Person," etc.*

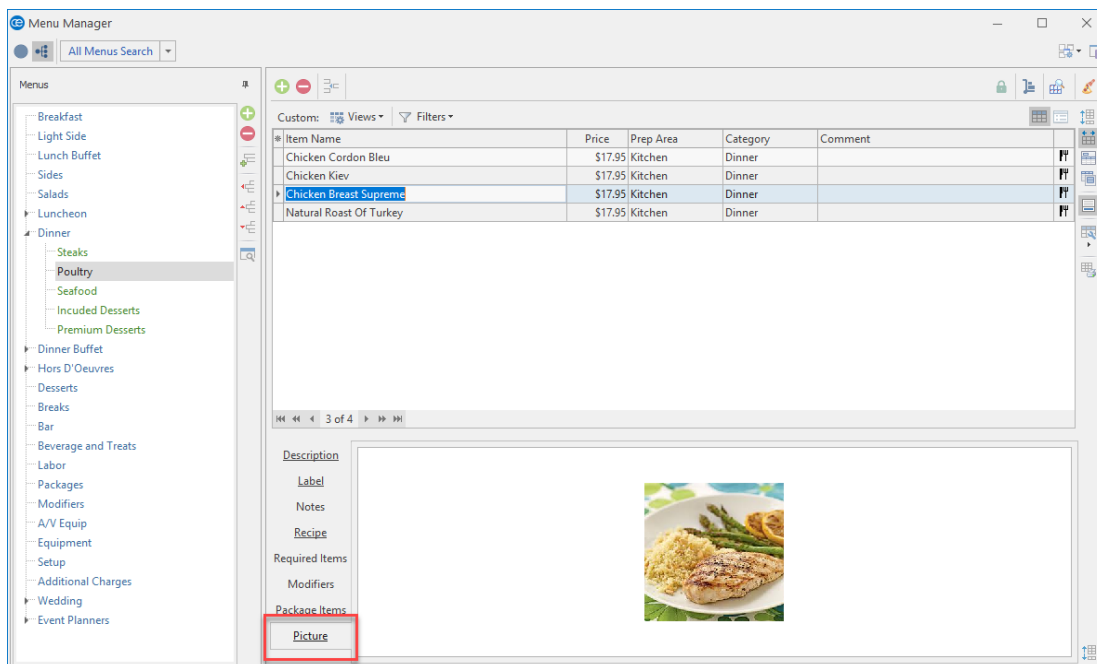
Including Digital Images of Your Food/Service Items

You can make your menus come alive by including a digital image of your food/service items. You can display them on your screen for your clients to see, e-mail them, or print them and attach them to your contracts.

Assigning Images

1. In your Menu Manager, select the menu items you want to assign an image to.
2. Click the **Picture** tab.
3. Right-click inside the image box. (The box will be empty – blank – if an image has yet to be assigned to this item.)
4. Select **Load From File**.
5. Browse to your image and select it.
6. Click **Open**.

Note: Alternatively, you may double-click the image to insert it.

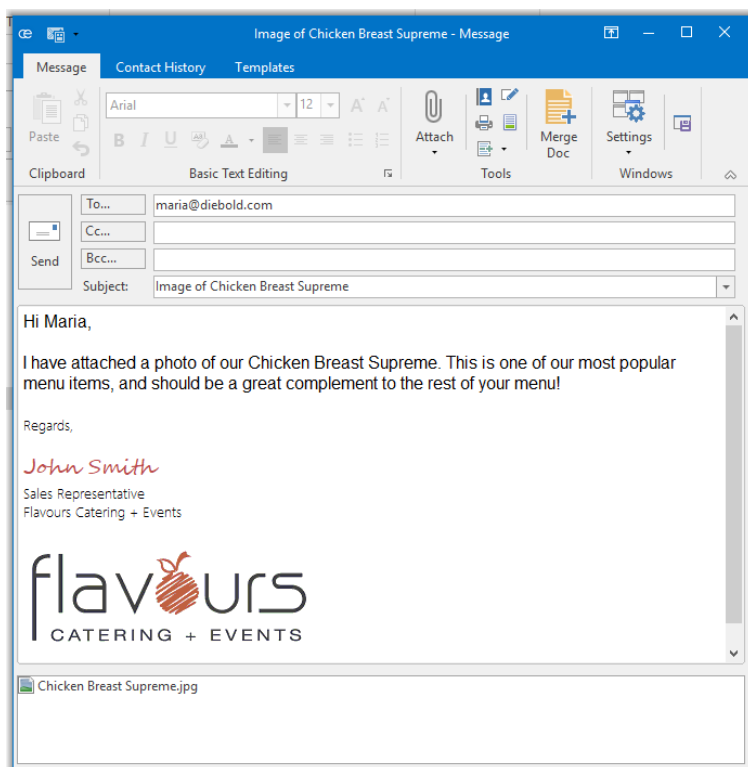


E-mailing an Image

1. In your Menu Manager, click the name of the menu item you would like to e-mail an image of.
2. In the lower left-hand corner of the Menu Manager screen, click your right mouse button in the image box. (The box will be empty – blank – if an image has yet to be assigned to this item.)
3. Select **Email Picture**.

Result: An e-mail window opens, with the image attached at the bottom of the window. The e-mail is ready to be addressed and sent.

Tip: The ability to e-mail an image is also available in Event Manager. From the **Food/Service** tab in Event Manager, right-click on the image and select **Email Picture**. The image will be inserted as an attachment to the e-mail, and the **To** field of the e-mail will auto-populate the event contact's e-mail address.



Unit 6: Using the Menu Manager Tools

In this section, you will learn:

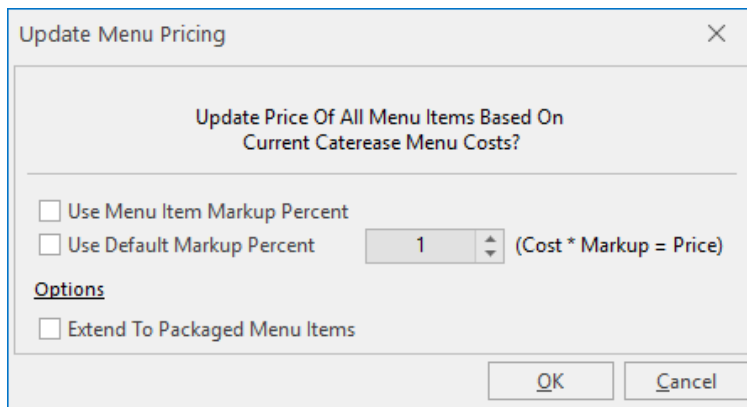
- Updating Menu Pricing
- Updating Costing from Ingredients Lists
- Updating Menu Costing from Another Source
- Batch Processing Food/Service Items
- Making a Menu Inactive
- Inserting Page Breaks

Updating Menu Pricing

You can update pricing for all menu items at one time, based on changes to item costs.

Updating Menu Pricing

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).
Result: The Menu Manager window opens.
2. Click the **Tools** button, located at the top of your screen, and choose **Menu Pricing Update**.
Result: The Update Menu Pricing window opens.



3. Choose options at the bottom of the window as desired, by clicking the corresponding checkboxes:
 - **Use Menu Item Markup Percent (Only)**
Allows you to mark up menu item prices using the specific markup percent attached to each individual menu item.
Note: If no markup exists for a menu item, no price adjustment will be made.
 - **Use Default Markup Percent (Only)**
Allows you to update the price of an item based on the Default Markup Percent that you type into the entry box while ignoring the item's own markup percentage.
 - **Use Menu Item Markup AND Use Default Markup Percent**
This will update the price of the item based on the item's own markup percentage. If none is available, the price will be updated based on the Default Markup Percent that you have typed into the entry box.
Note: The Markup By field is not entered as a percentage, but as a decimal which is multiplied by the total cost of the menu item. For example, if the updated ingredients cause the total cost of a menu item to be \$3.00, and you have "1.1" entered in the Markup By field, the price will calculate to \$3.30 (\$3.00 X 1.1).

- **Extend to Packaged Menu Items**

Extends cost and/or price markups to items on the Package Items tab in Menu Manager, in addition to regular menu items.

4. Click **OK**.

Result: *An informational prompt appears.*

5. Click **OK**.

Result: *The update tool closes down and your menu costs and/or prices are updated.*

Updating Menu Costing

You can quickly update menu item costs (and even prices) from your program's master ingredients list or using interfaces with other menu management software. Once menu information is updated, you can even update the costs of future events you have already booked.

Updating Costing from Ingredients List

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

Result: The Menu Manager window opens.

2. Click the **Tools** button, located at the top of your screen, and choose **Menu Costing Update > From Ingredients List**.

Result: The Update Menu Costing window opens.

Tip: After you have upgraded the costs of your menu items, you may want to upgrade the costs of your future events based on these new item costs.

3. Click into the checkbox to the left of Update Menu Prices.

Result: Two additional options become available: **Use Menu Item Markup Percent** and **Use Default Markup Percent**.

4. Choose options at the bottom of the window as desired, by clicking the corresponding checkboxes:

- **Use Menu Item Markup Percent (Only)**

Allows you to mark up menu item prices using the specific markup percent attached to each individual menu item.

Note: If no markup exists for a menu item, no price adjustment will be made.

- **Use Default Markup Percent (Only)**

Allows you to update the price of an item based on the Default Markup Percent that you type into the entry box while ignoring the item's own markup percentage.

- **Use Menu Item Markup AND Use Default Markup Percent**

This will update the price of the item based on the item's own markup percentage. If none is available, the price will be updated based on the Default Markup Percent that you have typed into the

entry box.

Note: The Markup By field is not entered as a percentage, but as a decimal which is multiplied by the total cost of the menu item. For example, if the updated ingredients cause the total cost of a menu item to be \$3.00, and you have "1.1" entered in the Markup By field, the price will calculate to \$3.30 (\$3.00 X 1.1).

- **Extend to Packaged Menu Items**

Extends cost and/or price markups to items on the Package Items tab in Menu Manager, in addition to regular menu items.

5. Click **OK**.

Result: An informational prompt appears.

6. Click **OK**.

Result: The update tool closes down and your menu costs and/or prices are updated.

Updating Costing from Another Source

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

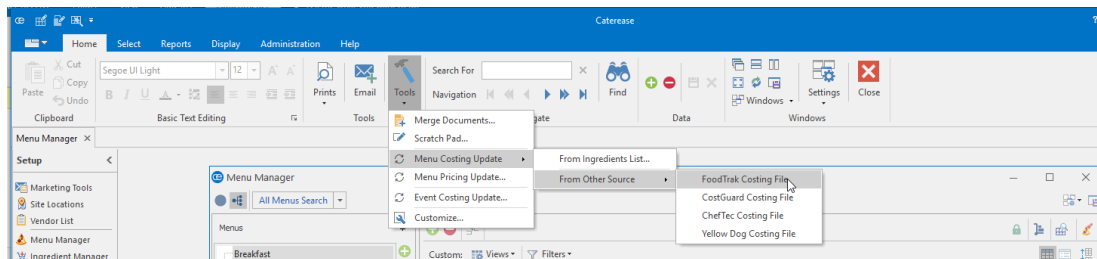
Result: The Menu Manager window opens.

2. Click the **Tools** button at the top of the screen and choose **Menu Costing Update > From Other Source**.

3. Select the "Other Source," i.e., interface.

Result: A browse window appears, open to the folder you have established as your export folder for this interface.

Note: If you are prompted that you have not yet established an export folder (or that the folder you have selected does not contain the appropriate file), check to confirm you have already exported information from your menu management program.



4. Select the file of menu information to be imported, and click **Open**.

Result: A confirmation message appears.

Note: This message might include important information, such as the modified date of your selected costing file and the date you last updated your menu costing.

5. Click **Yes** to confirm.

Result: A split screen appears, listing menu items, prices, and costs being imported from the interface and their corresponding items in Caterease.

6. **[Optional]** Click **Include Sell Price** if you would like the sell prices of items to be updated along with their costs.
7. Click **Process Update**.
8. Click **Print** (top left of form) if you want to generate a report of all items listed on this screen, including those that were updated and those that did not find matches in Caterease.

Tip: Remember that items are only linked in this interface if the Item Code in Caterease matches the corresponding number in your menu management program. Those corresponding numbers (PLU's) are listed here in the first column on this interface window (with the heading "Item Code"). You can print this list (Step 8, below), and enter those numbers into the Item Code column in Caterease.

Making Changes to Menu Items in Batch

You can make changes to multiple menu items in your default menus simultaneously. Change such details as menu Item Type, Category, whether the item is published to your online ordering website, whether an item is inventoried, or a host of other options - including basic font formatting of menu item Descriptions, Recipes, Labels or Notes.

Batch Processing Menu Items

1. In the left pane of the Menu Manager window, click the title of the menu containing items you want to edit (or click **All Menus** to select items from multiple menus simultaneously).
2. In the main pane of the window, select multiple items by either holding your **[Shift]** key down to select a group of contiguous items or by holding your **[Ctrl]** key down to select individual items.
3. Click your right mouse button over any one of the selected items.
***Result:** A pop-up menu of options appears.*
***Note:** If you right-click on an item that's not currently selected, all selected items become deselected.*
4. Choose **Special Editing > Batch Processing**.
***Result:** The Batch Processing window opens.*

Batch Processing

General | Formatting

Field	Value	Checkbox
Type	Food	<input checked="" type="checkbox"/>
Cost		<input type="checkbox"/>
Markup		<input type="checkbox"/>
Price		<input type="checkbox"/>
Prep Area		<input type="checkbox"/>
Acct Code		<input type="checkbox"/>
Item ID		<input type="checkbox"/>
Category		<input type="checkbox"/>
Comment		<input type="checkbox"/>
Item Unit		<input type="checkbox"/>
Packing Unit		<input type="checkbox"/>
Qty/Unit	0	<input type="checkbox"/>
Unit Rounding		<input type="checkbox"/>
Vendor		<input type="checkbox"/>
Url		<input type="checkbox"/>
Usage Var	0	<input type="checkbox"/>
No Tax	<input type="checkbox"/>	<input type="checkbox"/>
No SC	<input type="checkbox"/>	<input type="checkbox"/>
No Grat	<input type="checkbox"/>	<input type="checkbox"/>
Default Qty		<input type="checkbox"/>
Rounding		<input type="checkbox"/>
Linked	<input type="checkbox"/>	<input type="checkbox"/>
Delivery	<input type="checkbox"/>	<input type="checkbox"/>
Hide	<input type="checkbox"/>	<input type="checkbox"/>
Inactive	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Item	<input type="checkbox"/>	<input type="checkbox"/>
Inv Min	0	<input type="checkbox"/>
In Stock	0	<input type="checkbox"/>
Required Item	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

- On the **General** tab of the Batch Processing window, click into the checkbox next to any field you would like to change for all of your selected menu items.
- In the field itself, enter the new value you would like for all selected menu items.
Note: Most fields have for your convenience. Some, such as No Tax, No SC, Linked, Hide, etc., have checkboxes that you can enable or disable for all selected menu items.
- [Optional]** Click the **Formatting** tab and establish formatting changes (font style, font size, and

alignment), then click into the checkboxes at the bottom of the tab to indicate which detail of all selected menu items you want reformatted (Description, Instructions, Label, or Notes).

8. When finished, click **OK**.

Result: *Your changes are applied to all selected menu items and a confirmation message appears.*

Note: *Depending on the number of changes/items, this process could take a few minutes.*

9. Click **OK** to close the confirmation message window.

Making a Menu Temporarily Inactive

You can make one of your default menus temporarily inactive, so that it will not appear when selecting menu items for an event, and will not appear on your Menu Summary print. This can be particularly useful for seasonal menus.

Making a Menu Inactive

1. In the left pane of the Menu Manager window, right-click on a menu title.

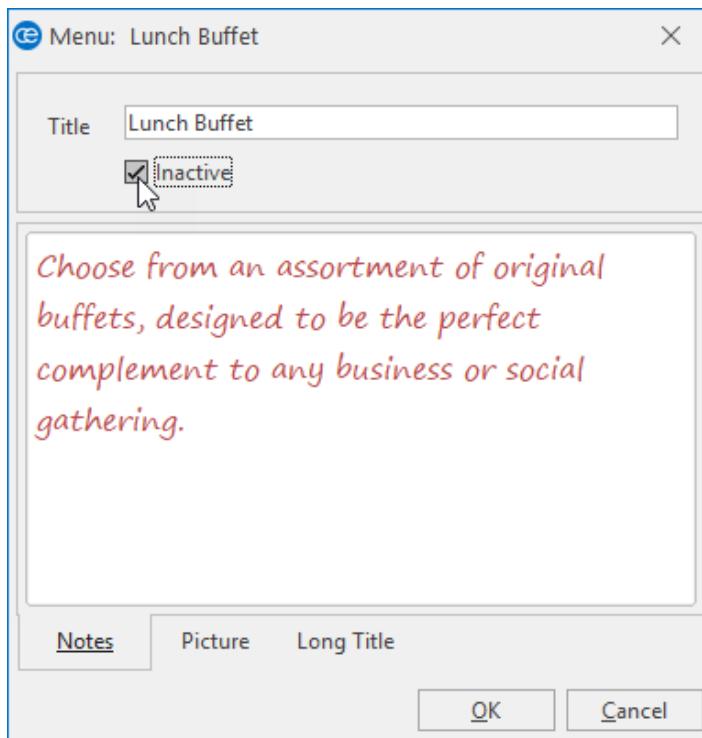
Result: A pop-up menu appears.

2. Select **View/Edit Menu Details**.

Result: The details window for the selected menu appears.

Note: As an alternative, you can click on a title to select it and then click the **View/Edit Menu Details**

button  on the right-hand side of the titles pane.



3. Click into the checkbox labeled **Inactive**.

Result: The menu is made inactive.

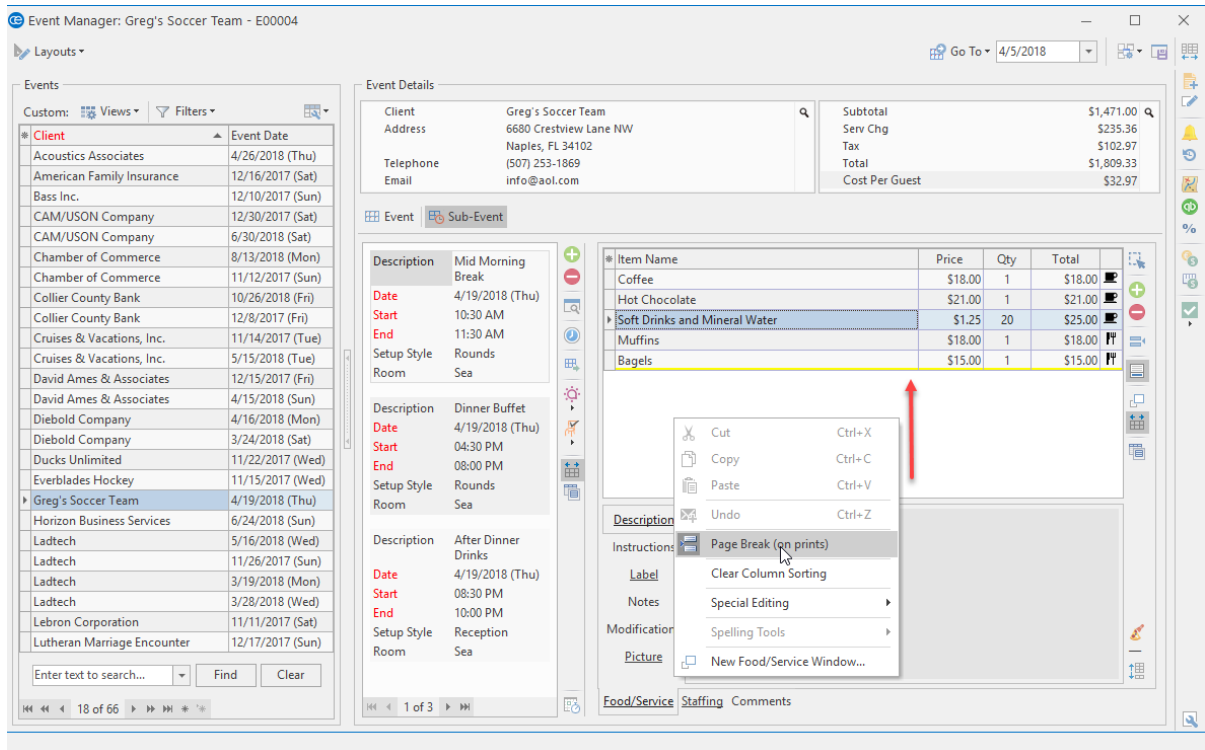
Note: The menu's title will still appear in this left pane of Menu Manager, but will be grayed out; it will no longer be shown when selecting menu items for an event.

Inserting Page Breaks

The page break inserts a marker after the item you select. This marker indicates that the item is to appear on a separate page. A well-placed page break will enable your prints to be more logically organized (perhaps serving as dividers among soups and salads, entrees, desserts, etc.).

Inserting Page Breaks

1. Click on any Sub-Event in Event Manager.
 2. From the **Food/Service** tab, right-click (within the grid) where you would like a new page to begin.
 3. Select **Page Break (on prints)**.
- Result:** A yellow line is inserted under the last item name which will appear before the page break. When you generate a print, the designated item will display on its own page.



Unit 7: Using Menu Manager Reports

In this section, you will learn:

- Generating the Menu Items by Category Report
- Tracking Used Menu Items via the Menu Item Usage Report
- Generating the Ingredients Report
- Generating the Required Items Report

Unit 7: Using Menu Manager Reports

Generating the Menu Items by Category Report

This report lists all menu items by category (if the menu items have been placed into a category). In addition, the report will display the description, type, account code, item ID, cost, and price for each item.

1. Click the **Reports** ribbon tab at the top of the screen.
2. Click the **Menus** button and choose **Menu Items (By Category)**.
Result: The *Menu Items (By Category) Report* is generated, depicting the menu item, grouped by category, and its associated details, such as price, cost, etc.

Tip: Use the scroll bar on the right-hand side of the window to scroll through the report.

Menu Item Name	Menu	Type	Acct Code	Item ID	Cost	Price
Breakfast						
The Skyway Buffet	Breakfast	Food			8.07	18.95
Lite Start Buffet	Breakfast	Food			6.47	9.71
Wyles Breakfast Buffet	Breakfast	Food			1.99	17.95
Midwesterner	Breakfast	Food			8.69	18.95
Daybreaker	Breakfast	Food			6.52	15.95
Morning Delight	Breakfast	Food			6.45	15.95
Eye Opener	Breakfast	Food			6.37	15.95
The Harbor Buffet	Breakfast	Food			7.01	15.95
Wyle's Special	Breakfast	Food			6.45	15.95
Total Count: 9						
Lunch						
Menu Item Name	Menu	Type	Acct Code	Item ID	Cost	Price
Chester Salad	Light Side	Food			1.35	2.50
Chef Salad	Light Side	Food			3.11	6.22
French Dip	Light Side	Food			4.52	9.04
BBQ Beef	Light Side	Food			3.69	7.38
Chicken Salad Croissant	Light Side	Food			4.00	8.00
Tuna Salad Croissant	Light Side	Food			3.35	6.70
Turkey Croissant	Light Side	Food			2.80	5.60
Ham Croissant	Light Side	Food			1.90	3.80
Club Croissant	Light Side	Food			3.03	6.06
Del Plate	Light Side	Food			3.56	7.12
Chef's Table Buffet	Lunch Buffet	Food			3.12	6.24
All-American	Lunch Buffet	Food			26.21	52.42
Total Count: 12						
Dinner						

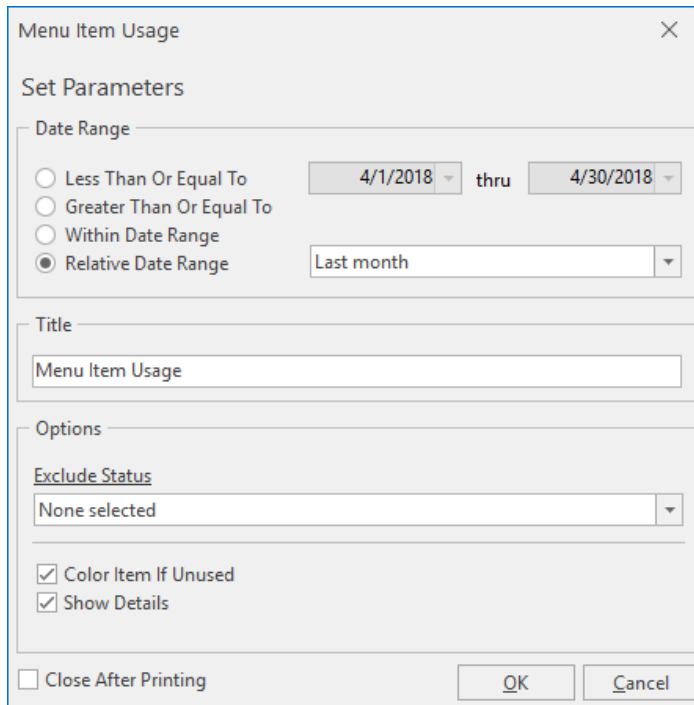
3. Optionally print, export, or e-mail the report.
4. When finished viewing the report, click the X at the top right-hand side of the window.
Result: The *Menu Items (By Category) Report* closes.

Unit 7: Using Menu Manager Reports

Tracking Used Menu Items via the Menu Item Usage Report

This report will list the total quantities of menu items used within a specific day or date range you indicate.

1. Click the **Reports** ribbon tab at the top of your screen.
2. Click the **Menus** button > **Menu Item Usage**.
***Result:** The Menu Item Usage window opens.*



The screenshot shows the 'Menu Item Usage' window with the 'Set Parameters' section expanded. It includes three sections: 'Date Range' with radio buttons for 'Less Than Or Equal To', 'Greater Than Or Equal To', 'Within Date Range', and 'Relative Date Range' (selected), with date pickers for '4/1/2018' and '4/30/2018' and a 'thru' label; a 'Title' section with a text box containing 'Menu Item Usage'; and an 'Options' section with an 'Exclude Status' dropdown menu (showing 'None selected'), two checked checkboxes for 'Color Item If Unused' and 'Show Details', and an unchecked checkbox for 'Close After Printing'. 'OK' and 'Cancel' buttons are at the bottom right.

3. Set a **Date Range** for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.
4. **[Optional]** Change the title of the report by highlighting the words "Menu Item Usage" and typing directly into the field.
5. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.
***Note:** Placing a check in a box causes the tool to exclude events with that status from your results.*
6. Optionally indicate if you would like to display a color indicator of unused menu items by clicking into the checkbox to the left of **Color Item if Unused**.
***Note:** Unused menu items will display in red font on the report.*

7. Optionally indicate if you would like to display extended menu item details by clicking into the checkbox to the left of **Show Details**.
8. Click **OK** to generate the report.

Menu Item Usage

4/1/2018 - 4/30/2018

Item Name	Type	Category	Prep Area	Comment	Acct Code	Price	Usage
Breakfast							
The Skyway Buffet	Food	Breakfast	Hot Line			18.95	-
Lite Start Buffet	Food	Breakfast	Hot Line			15.95	-
Wyles Breakfast Buffet	Food	Breakfast	Hot Line			17.95	-
Midwesterner	Food	Breakfast	Hot Line			18.95	-
Daybreaker	Food	Breakfast	Hot Line			15.95	-
Morning Delight	Food	Breakfast	Hot Line			15.95	-
Eye Opener	Food	Breakfast	Hot Line			15.95	-
The Harbor Buffet	Food	Breakfast	Hot Line			15.95	-
Wyle's Special	Food	Breakfast	Hot Line			15.95	-
Light Side							
Caesar Salad	Food	Lunch	Cold Prep			5.95	20
Usage: Event #	Date	Client	Name	Category		Price	Qty
E00403	4/15/2018	Wiggins, Goodlette &	Caesar Salad	Lunch		4.95	20
Chef Salad	Food	Lunch	Cold Prep			6.95	-
French Dip	Food	Lunch	Kitchen			6.95	-
BBQ Beef	Food	Lunch	Kitchen			6.95	-
Chicken Salad Croissant	Food	Lunch	Cold Prep			6.95	-
Tuna Salad Croissant	Food	Lunch	Cold Prep			6.95	30
Usage: Event #	Date	Client	Name	Category		Price	Qty
E00390	4/8/2018	Naples Dental Assoc.	Tuna Salad Croissant	Lunch		6.95	15
E00391	4/22/2018	Naples Dental Assoc.	Tuna Salad Croissant	Lunch		6.95	15
Turkey Croissant	Food	Lunch	Cold Prep			6.95	30
Usage: Event #	Date	Client	Name	Category		Price	Qty
E00390	4/8/2018	Naples Dental Assoc.	Turkey Croissant	Lunch		6.95	15
E00391	4/22/2018	Naples Dental Assoc.	Turkey Croissant	Lunch		6.95	15
Ham Croissant	Food	Lunch	Cold Prep			6.95	30
Usage: Event #	Date	Client	Name	Category		Price	Qty
E00390	4/8/2018	Naples Dental Assoc.	Ham Croissant	Lunch		6.95	15
E00391	4/22/2018	Naples Dental Assoc.	Ham Croissant	Lunch		6.95	15
Club Croissant	Food	Lunch	Cold Prep			6.95	30
Usage: Event #	Date	Client	Name	Category		Price	Qty
E00390	4/8/2018	Naples Dental Assoc.	Club Croissant	Lunch		6.95	15
E00391	4/22/2018	Naples Dental Assoc.	Club Croissant	Lunch		6.95	15
Deli Plate	Food	Lunch	Cold Prep			7.25	20
Usage: Event #	Date	Client	Name	Category		Price	Qty
E00403	4/15/2018	Wiggins, Goodlette &	Deli Plate	Lunch		7.25	20

Generating the Ingredients Report

You can generate a report that will list all ingredients for all events taking place on the day or date range you indicate. This report can be set, in Global Settings, to convert the quantity of ingredients to the most efficient measure (for ingredients-ordering purposes).

Generating the Ingredients Report

1. Click the **Reports** ribbon tab at the top of the screen.

2. Click the **Management** button and choose **Ingredients**.

Result: The *Ingredients* window opens, where you can select your report parameters.

Tip: As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

Ingredients [X]

Set Parameters

Date Range

☐ Less Than Or Equal To 4/1/2018 thru 4/30/2018
☐ Greater Than Or Equal To
☐ Within Date Range
☒ Relative Date Range This month

Title

Ingredients List

Options

Exclude Status [Closed; Cancelled]

Group By

Category [None]

☐ Show Filter
☐ Allow Wrapping

☐ Separate Page For Each Group
☐ Exclude Items Without Quantities

Report Layout

Drill Down Header

☐ Expand Details
☐ Show Summary Footer

☐ Use Procurement Unit For Summary Conversions
☒ Add Sub-Recipe Ingredients To Primary Ingredients

☐ Include Food/Service Items Without Ingredients
☐ Separate Page For Food/Service Items

☐ Close After Printing **OK** **Cancel**

3. Set a **Date Range** for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.
4. **[Optional]** Change the title of the report by highlighting the words "Ingredients List" and typing directly into the field.
5. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like to exclude from your results.
***Note:** Placing a check in a box causes the tool to exclude events with that status from your results.*
6. **[Optional]** Click the down arrow under **Group By** and choose to group by a detail other than ingredient.
***Note:** A second Group By field is available if you want to establish a second group-by detail.*

7. **[Optional]** Select other available options:

- **Show Filter** - Choose this option if you would like filter details to display on the report.
- **Allow Wrapping** - Choose this option if the description is long and you would like it to wrap on the printed report.
- **Separate Page for Each Group** - Choose this option to show separate pages for each grouped item.
- **Exclude Items Without Quantities** - Choose this option to exclude items where no quantities are indicated.

8. **[Optional]** Click the down arrow to the right of the Report Layout field if you would like to change the report's view from Drill Down Header to Standard Summary format.

Note: "Drill Down Header" places the ingredient summary on top of the Ingredients section. Click the expand button to the left of the item to view all ingredient details. "Standard Summary" places the summary at the bottom of the section.

Tip: Choose Drill Down Header Layout for printed output or exporting to PDF; choose Standard Summary Layout when exporting to an Excel spreadsheet.

9. **[Optional]** Select other available options:

- **Expand Details** - Choose this option to automatically expand all ingredient details.
Note: This field is available in the Drill Down Header Layout.
- **Show Summary Footer** - Choose this option to automatically display the summary footer.
Note: This field is available in the Standard Summary Layout.

10. Click into the checkbox to the left of **Use Procurement Unit for Summary Conversions** to view the report with its unit summaries converted to the Procurement Unit.11. Click into the checkbox to the left of **Add Sub-Recipe Ingredients to Primary Ingredients** if you would like to view all ingredients, including those ingredients used in sub-recipes.12. **Include Food/Service Items Without Ingredients** - Choose this option to include items on the report even if no ingredients exist.13. **Separate Page for Food/Service Items** - Choose this option to show separate pages for each Food/Service item.14. When finished setting your report parameters, click **OK**.

Result: The Ingredients Report is generated, incorporating the parameters you established.

Generating the Required Items Report

You can generate a report that will list all required items for all events taking place on the day or date range you indicate. This report allows you to group and filter your Food/Service items in order to retrieve very specific information.

Generating the Required Items Report

1. Click the **Reports** ribbon tab at the top of the screen.
2. Click the **Management** button and choose **Required Items**.
Result: The Required Items window opens, where you can select your report parameters.

Tip: As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

The screenshot shows the 'Required Items' window with the following sections and options:

- Set Parameters**
 - Date Range**
 - ☐ Less Than Or Equal To: 5/1/2018 thru 5/31/2018
 - ☐ Greater Than Or Equal To
 - ☐ Within Date Range
 - ☒ Relative Date Range: This month
 - Title**: Required Items
- Options**
 - Exclude Status**: None selected
 - Group By**: Event Date, None
 - Sort Order**:
 - ☒ Category
 - ☐ Vendor
 - ☐ Date
 - ☐ Event #
 - ☐ Client
 - ☐ Separate Page For Each Group
 - ☐ Exclude Items Without Quantities
 - ☐ Allow Wrapping
 - Report Layout**: Drill Down Header
 - ☐ Expand Details
 - ☐ Show Summary Footer
 - ☐ Include Food/Service Items Without Required Items
 - ☐ Separate Page For Food/Service Items
 - ☐ Show Filter
- ☐ Close After Printing
- Buttons**: OK, Cancel

3. Set a **Date Range** for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.
4. **[Optional]** Change the title of the report by highlighting the words "Required Items" and typing directly into the field.
5. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like to exclude from your results.
***Note:** Placing a check in a box causes the tool to exclude events with that status from your results.*
6. **[Optional]** Click the down arrow under **Group By** and choose to group by a detail other than required items.
***Note:** A second Group By field is enabled if an option other than **None** is selected in the first field.*
7. **[Optional]** Click into the checkboxes under **Sort Order** and choose to sort required items by a particular detail.
***Note:** If more than one detail is selected, the sort order can be rearranged by clicking on a checked-off field and dragging up or down into a new position.*
8. **[Optional]** Select other available options.
 - **Separate Page for Each Group** - Choose this option to show separate pages for each grouped item.
 - **Exclude Items Without Quantities** - Choose this option to exclude items where no quantities are indicated.
 - **Allow Wrapping** - Choose this option if the description is long and you would like it to wrap (on the printed report).
9. **[Optional]** Click the down arrow to the right of the Report Layout field if you would like to change the reports view from Drill Down Header to Standard Summary format.
***Note:** "Drill Down Header" places the required items summary on top of the Required Items section. Click the expand button to the left of the item to view all required item details. "Standard Summary" places the summary at the bottom of the section.*

Tip: Choose Drill Down Header Layout for printed output or exporting to PDF; choose Standard Summary Layout when exporting to an Excel spreadsheet.

 - **Include Food/Service Items Without Required Items** - Choose this option to include food/service items on the report even if no required items exist.
***Note:** If this option is selected, the Specific Type field becomes available, where you can make a selection from the drop-down list.*
 - **Separate Page for Food/Service Items** - Choose this option to show separate pages for each Food/Service Item.
***Note:** This option becomes available if the **Include Food/Service Items Without Required Items** option is checked.*
10. Click into the checkbox to the left of **Show Filter** if you would like your filter selection(s) to display on the print.

Result: *The corresponding field is enabled and any Food/Service types that have been set up in the **Administration** area of the program are visible in the drop-down list.*

10. When finished setting your report parameters, click **OK**.

Result: *The Required Items Report is generated, incorporating the parameters you established.*

Unit 8: Using Menu Manager Queries

In this section, you will learn:

Printing and Modifying Food/Service Item Labels
Tracking Required Items Usage

Unit 8: Using Menu Manager Queries

Printing Menu Item Labels

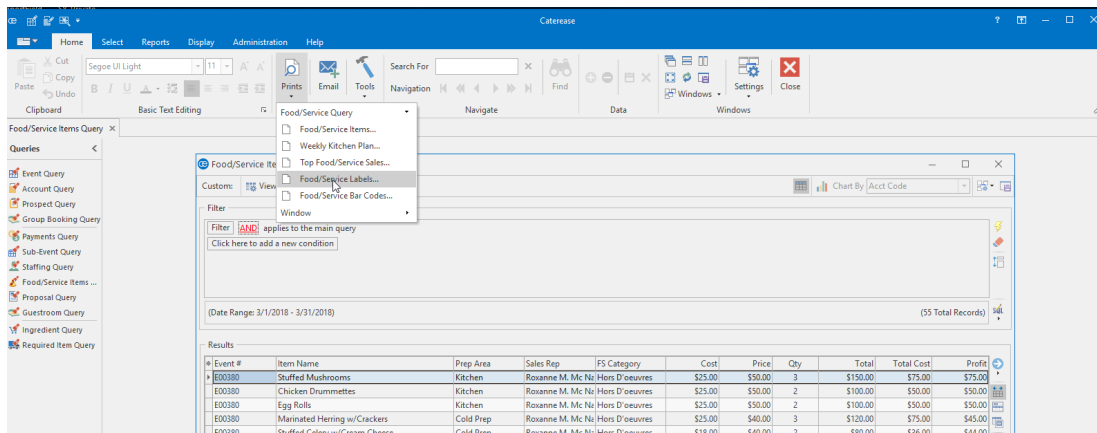
Sometimes it's handy to have labels for your food/service menu items. Whether you are packing the labels for an off-premise event, or whether you just need a quick reference for chafing dishes or trays, labels can be quickly generated from your Food/Service Items Query. (This feature is available in the Professional version.)

Printing Menu Item Labels

1. Generate a Food/Service Items Query (**Queries > Food/Service Items**).
2. Click on a food/service item in your query results grid to select it, or hold your **[Ctrl]** key or **[Shift]** key down to select multiple items.
Note: The **[Ctrl]** key lets you select multiple records; the **[Shift]** key selects two records and all others in between them. You can also click your right mouse button over the grid and choose **Select All Records**.

Tip: Also, try generating a variety of different-sized labels directly from your Event Manager (**Prints button > General > Labels & Menu Cards**).

3. Click the bottom half of the **Prints** button, located in the **Home** ribbon tab at the top of your screen.



4. Click **Food/Service Query > Food/Service Labels**.
Result: The Food/Service Item Packing Labels window opens.

Food/Service Item Packing Labels

Set Parameters Modify

Avery Label

Label Type: Address 5160

Options

☐ Center Text

Visible Fields ☐ FS-Time

- ☒ Name w/Qty
- ☐ Category
- ☐ Type
- ☐ Prep Area
- ☐ Acct Code
- ☐ Item Unit
- ☒ Event #
- ☐ Event Date
- ☒ Client
- ☒ Address
- ☒ City, St/Prov, Postal
- ☐ Telephone
- ☐ Room
- ☐ Site Name
- ☐ Party Name

☐ Close After Printing OK Cancel

5. Click on an Avery Label format from the **Label Type** drop-down list.
6. Click into any checkbox or checkboxes under **Visible Fields** to choose which information you want to appear on the labels. (You can switch the order by dragging fields up and down within the window.)
7. **[Optional]** Click into the checkbox next to **Center Text**, under **Options**, if you want the text you chose in Step 6, above, to be centered on the label.
8. Click **OK** when finished.
Result: A Print Preview of the labels appears.
9. Click the **Print** button to print the labels.

Modifying Menu Item Labels

At times, you may want to make a one-time-only modification to one or several of your food/service item labels before you send them to the printer. Perhaps you need to include a note on the label, or perhaps you need more than one label for a particularly large item. Making modifications to your labels can be done easily from the Food/Service Query.

1. Follow Steps 1-7, above, to select your Avery Label style and designate the optional information to appear on each label.
2. Click the **Modify** button at the top right of the Food/Service Item Packing Labels window.
Result: The *Modify Packing Labels* window opens.
3. Click into any column on the Modify Packing Labels window and edit the information as desired.
Note: These are one-time-only changes.
4. Click **Close** when finished.
5. Click **OK** on the Food/Service Item Packing Labels window to generate your Print Preview.

Available Label fields are listed below:

Option	Description
Event #	This reflects the Event #, and cannot be edited.
Event Date	This reflects the Event Date, and cannot be edited.
Item Name	Type here to edit the name of a food/service item as it appears on your label. For example, if a particular menu item cannot be packed into one box, you might add the words "2 Boxes" to the end of its name on the label (then see Cnt , below). Note that this number only appears on the label if "Name w/Qty" has been selected as an option.
Qty	This is the quantity of food/service items included, and can be edited as desired. Note that this number only appears on the label if "Name w/Qty" has been selected as an option. (See Step 6, "Printing Menu Item Labels.")
Cnt	If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary count here. Simply type as desired, and whatever number you type will be the number of labels generated for that item.
Client	Type here to edit the Client/Organization.
Address	Type here to edit the mailing address.
City	Type here to edit the city where the customer resides.
St/Prov	Type here to edit the state or province where the customer resides.

Option	Description
Postal	Type here to edit the ZIP code where the customer resides.
Telephone	Type here to edit the recipient's telephone number.
Room	Merges in the name of the room of the event's first sub-event.
Site Name	Merges in the name of the off-premise site location of the event's first sub-event.
Party Name	Merges in the party name of the event. e.g., "Smith Wedding Reception," "Jones Birthday Party," etc.
Prep Area	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field).
Category	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field).
Acct Code	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field).
Unit	If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary unit here. Simply type as desired, and whatever number you type will be the number of labels generated for that item.

Tracking Required Items Usage

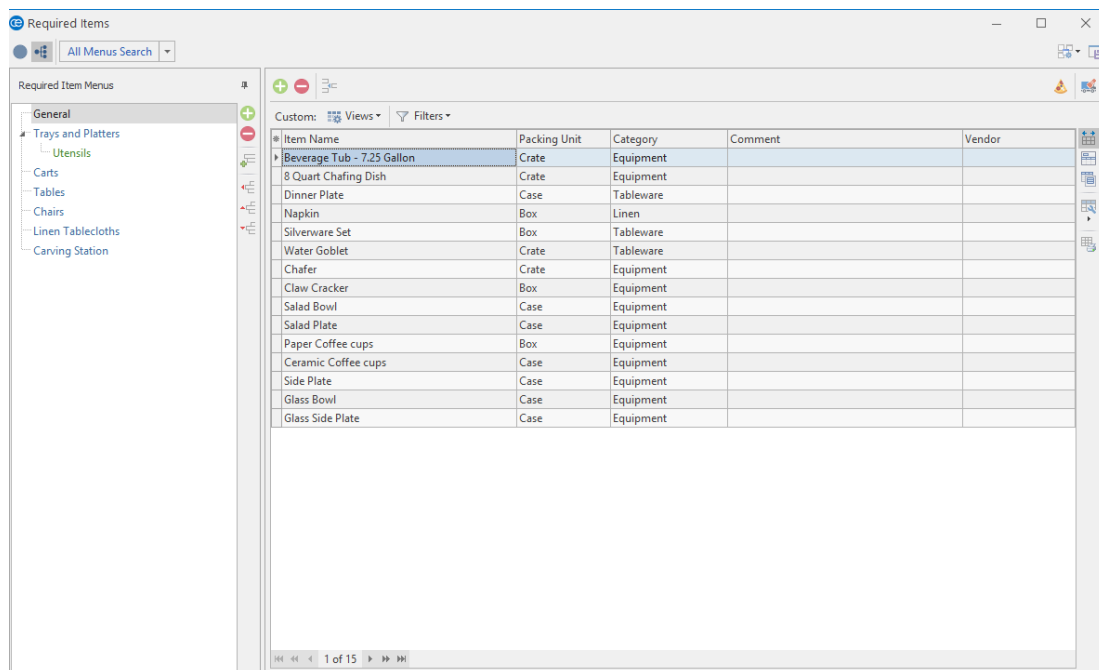
The Required Items Manager not only allows you to create custom lists of required items, but it also offers a handy Required Items Activity tool that tracks the usage of those items. Note: You can also track Ingredient usage via the Ingredients Activity Query in Ingredient Manager.

Tracking Required Items Activity

1. Click the **Setup** sidebar on the left-hand side of the screen and choose **Required Items**.

Result: The Required Items window opens.

Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus > Required Items**.



2. Click a title in the left pane of the window to find the item or items you want to track.
3. Click one or several items in the list to select them.
Note: To select more than one item, hold your **[Ctrl]** key down as you click on them. Hold your **[Shift]** key down to select multiple, contiguous items. Click **[Ctrl] [A]** to select all records.



4. Click the **Required Items Activity Query** button at the top right of the window.
Result: The Required Items For Selected Items window opens, showing a grid listing usage of the currently selected items.

[illegible]

5. Customize the grid (sort, group, filter, export, or print data) as desired.



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