CATEREASE

Quick Reference Guide:
Program Setup

General Setup/Customization

Set Up Default Tax, Service Charge, and Gratuity

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Tax/Service Charge Rates**.
3. Enter a new tax rate for your Food/Service items by typing the number into the <u>Food</u> field within the <u>Tax 1</u> column.
4. Repeat as desired to enter default tax rates for all other item types.
5. Optionally continue to add rates into the <u>Tax 2</u> and <u>Tax 3</u> columns, if needed. (You can rename these fields. See the next topic, "Rename Existing Fields.")
6. Optionally click the **Tax Schedules** button to create multiple tax schedules which can be assigned to individual customers (accounts) or site locations used for an event.
7. Continue to add rates for default Gratuity and/or Service Charge for each type of item.
8. **[Optional]** Click into the **Tax Exempt** checkbox to make all new events default to Tax-Exempt.
9. **[Optional]** Enter whole dollar amounts into any of the fields under **Additional Adjustments** to add that amount to the Subtotal, Tax, Gratuity, or Service Charge of all new events.
10. When finished, click **OK**.

> **tip** Multiple tax rates are often used by European or Canadian companies, and can also be used in the U.S. to track separate City, State, and County taxes.

Default Tax & Service Charge Rates ✕

➡ Tax Schedules

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

	Tax 1	Tax 2	Tax 3	Gratuity	☐ Tax Grat At New Rate	Serv Chg	☐ Tax Serv Chg At New Rate
Food	7	0	0	0	0	0	0
Beverage	7	0	0	0	0	0	0
Liquor	7	0	0	0	0	0	0
Equipment	7	0	0	0	0	5	0
Labor	7	0	0	0	0	0	0
Room	7	0	0	0	0	0	0
Other	7	0	0	0	0	0	0
NA	0	0	0	0	0	0	0

Tax Exempt

☐ Tax Exempt

Exempt #' _____

Expires _____

Additional Adjustments   Item Codes

Subtotal	$0.00 ▾	
Tax 1	$0.00 ▾	_____
Tax 2	$0.00 ▾	_____
Tax 3	$0.00 ▾	_____
Gratuity	$0.00 ▾	_____
Serv Chg	$0.00 ▾	_____

OK   Cancel

See http://support.caterease.com/16/helpmenu/Setup/Establishing_Default_Tax_Rates.htm.

Rename Existing Fields

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Customize Names.**
3. Click into any field and type a new name for the field as desired.
4. When finished, click **OK**. *(A prompt will indicate that your prints will be affected due to the changes you made; you will need to redefine the fields in Print Designer. Click OK at the prompt.)*

Customize Names

General	
Client/Organization	Client/Organization
Party Name	Party Name
Sales Representative	Sales Rep
Coordinator	Coordinator
Reference	Reference
Loyalty #	Loyalty #
Required Items	Required Items
Client Group	Group
Financials	
Gratuity	Gratuity
Service Charge	Serv Chg
Taxes 1	Tax 1
Taxes 2	Tax 2
Taxes 3	Tax 3
Event Value	Value
Events	
SubEvent	SubEvent
Event Category	Category
Banquet Room	Banquet Room
Room Category	Room Category
Room Charge	Room Charge
(Scheduled) Items	Event Items
▶ **Times**	
▶ **Enterprise**	
▶ **Miscellaneous**	

Reset Names

OK   Cancel

See http://support.caterease.com/16/helpmenu/Setup/Renaming_Fields.htm.

Create User-Defined Fields

1. Click the **Setup** sidebar.
2. Click the **User Defined Fields** button.
3. Click the appropriate tab for the type of field you are creating. For example, click the **Events** tab for your Event Manager, **Accounts** tab for your Account Manager, etc.
4. Click into the first available user-defined field and type the new field name as desired.
5. Click the down arrow to the right of the Type field and select a format type for this field. (Choose from among Text; Phone; Number; Currency; Date; and Time.)
   Note: Click the X, to the right of the field, to reset to N/A, with a Type of Text, and to also clear any required field settings. (See the section entitled "Establish Required Fields" for more information about required fields.)
6. When finished, click **OK**.

User-Defined Fields

	Name Of Field	Type
	Accounts	
	Contacts	
1	Contact Type Preference	Text
	Events	Text
2	Contact Time Preference	Phone
	SubEvents	Number
3	NA	Currency
	Menu Items	Date
4	NA	Time
5	NA	
	Employees	
6	NA	Text
	Site Locations	
7	NA	Text
8	NA	Text
	Guestrooms	
9	NA	Text
	Reminders	
10	NA	Text
	Contact History	
11	NA	Text
	Vendors	
12	NA	Text
13	NA	Text
	Ingredients	
14	NA	Text
	Required Items	
15	NA	Text
16	NA	Text
17	NA	Text
18	NA	Text
19	NA	Text
20	NA	Text

OK   Cancel

See http://support.caterease.com/16/helpmenu/Setup/Creating_User_Defined_Fields.htm.

Add User-Defined Fields to Your Screen

1. In Event Manager (or other "Manager"), click your right mouse button on the tab where you would like to place the user-defined field.
2. Click **Customize**.
3. Hold your left mouse button down on one of the available fields.
4. Drag the field into the desired location on your screen, and then release your mouse button.
5. Repeat as desired, and then close the window.

6. Click the **Save Current Window Settings** button to retain the settings.

See http://support.caterease.com/16/helpmenu/Account_Manager/Making_Up_Your_Own_Fields_in_Account_Manager.htm
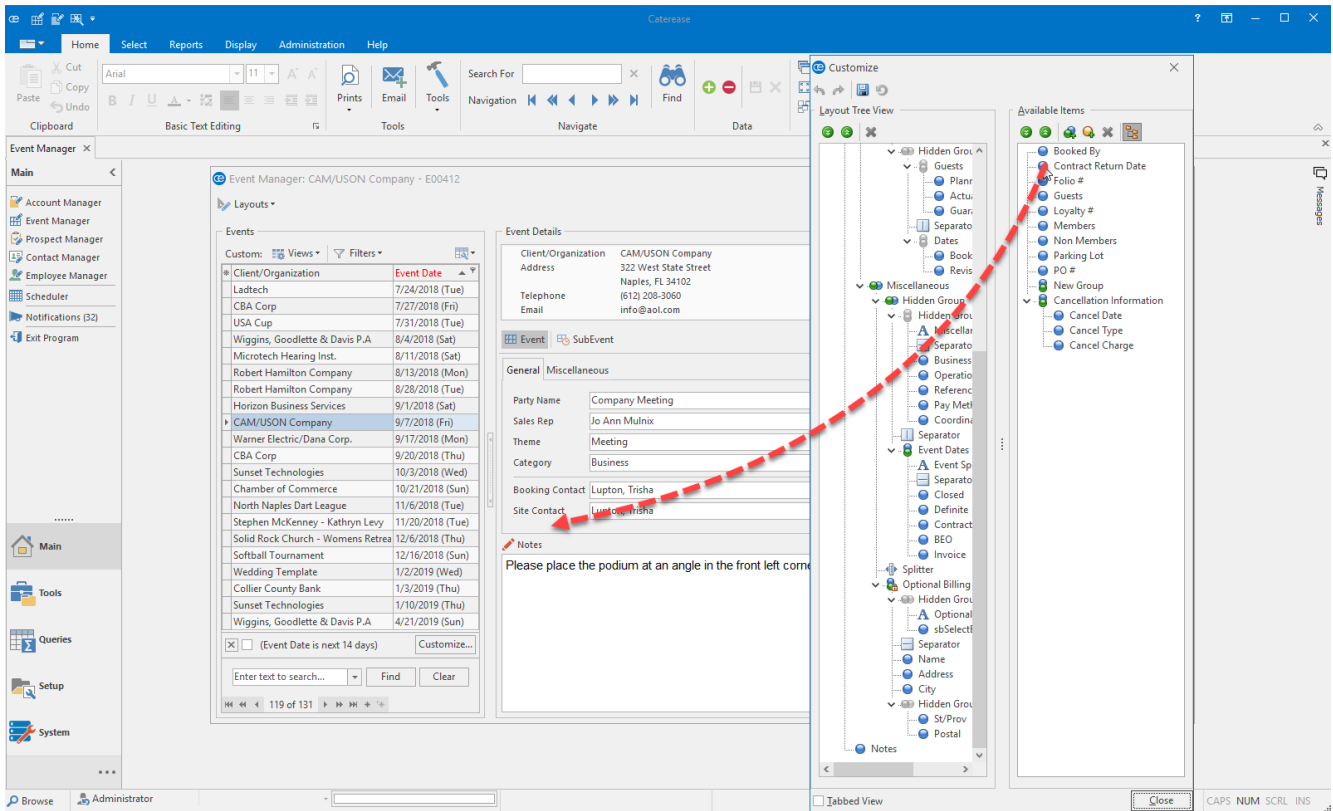
Set Up/Customize Quickpick Lists

1. Click the **Setup** sidebar.
2. Click the **Quickpicks** button.
3. Click the **Expand** button to the left of any quickpick category to expand the selection.
4. Click on the name of the sub-category you would like to add a quickpick item to.
5. Click the **Add New Item** button ⊕, located at the top right-hand side of the window, to add a new quickpick.
6. Type the name of the quickpick into the field.
7. When finished adding quickpicks, click **Close**.
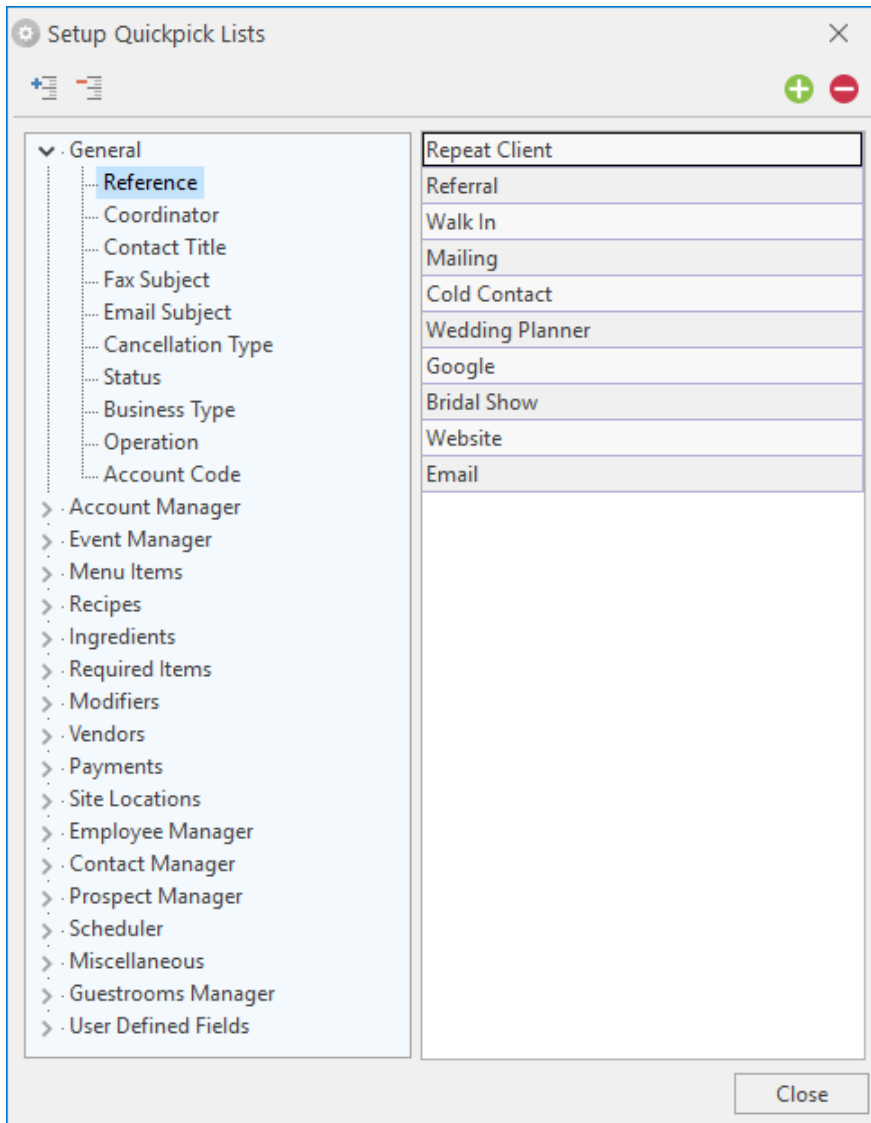
See http://support.caterease.com/16/helpmenu/Setup/Customizing_Quickpick_Lists.htm

Establish New Booking Defaults

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **New Booking Defaults.**
3. Click the tab representing the area of the program where you want to create New Booking Defaults.
4. Enter information into the fields provided by typing directly into the fields or by selecting options from the drop-down quickpick lists.
5. Click into a checkbox to enable a default feature.
6. When finished entering new booking defaults, click **OK**.

tip With New Booking Defaults, you can set certain default values for various fields in the program. These values can be overwritten at any time, but they exist to save time when entering new events/accounts/prospects, etc., into Caterease.

New Booking Defaults

Tabs: Accounts, Contacts, **Events**, Employees, SubEvents, Prospects, Guestrooms

Field	Value
Status	Tentative
Sales Rep	(Current Sales Rep)
Coordinator	
Theme	Banquet
Reference	
Category	Social
Pay Method	Credit Card
Business Type	On-Premise
Operation	Riverside Banquet Center

Default From Account Fields

Field	
Party Name From Client/O...	☑
Booking Contact	☑
Site Contact	☑
Notes	☑
Allergy	☑

Miscellaneous

Field	
Base Price Markup	

OK   Cancel

See http://support.caterease.com/16/helpmenu/Setup/Establishing_New_Booking_Defaults.htm

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Establish Required Fields

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Required Fields.**
3. Click the tab representing the area of the program where you want to create required fields. For example, click the **Events** tab for your Event Manager, **Accounts** tab for your Account Manager, etc.
4. In the right-hand pane of the window, click into the checkbox next to any field
   you want to designate as required information.
5. Optionally create *conditionally* required fields (click the link below for more information).
6. When finished, click **OK.**

> **tip** You can make certain fields "required" so that a record will not save without having the necessary fields filled in. You can even make certain fields **conditionally** required, meaning certain details are required for one type of event or customer but might not be required for others.

See http://support.caterease.com/16/helpmenu/Setup/Making_Fields_Required.htm.

Set Up the Scratch Pad

1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Scratch Pad.**
3. Click the **Add New Category** button ⊕, located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for the new category and press **[Enter].**
6. Click into the large white text block on the right-hand side of the window and type notes for this category. Browse to a stored image or add current date and time by right-clicking and choosing **Insert** > **Image** or **Insert** > **Current Date & Time**, respectively.
7. Click the ⊠ at the upper right-hand side of the window.
   Note: You will be prompted to save your changes.

Scratch Pad Setup

Categories

- General
- Setup Notes
  - Wedding
  - Social
- Delivery
- Equipment
- Wedding Notes
- Account Notes
- Plating Instructions
- Special Comments
- Follow Up
- Invoice
- Common History Notes
- Common Reminders
- Common Scheduler Notes
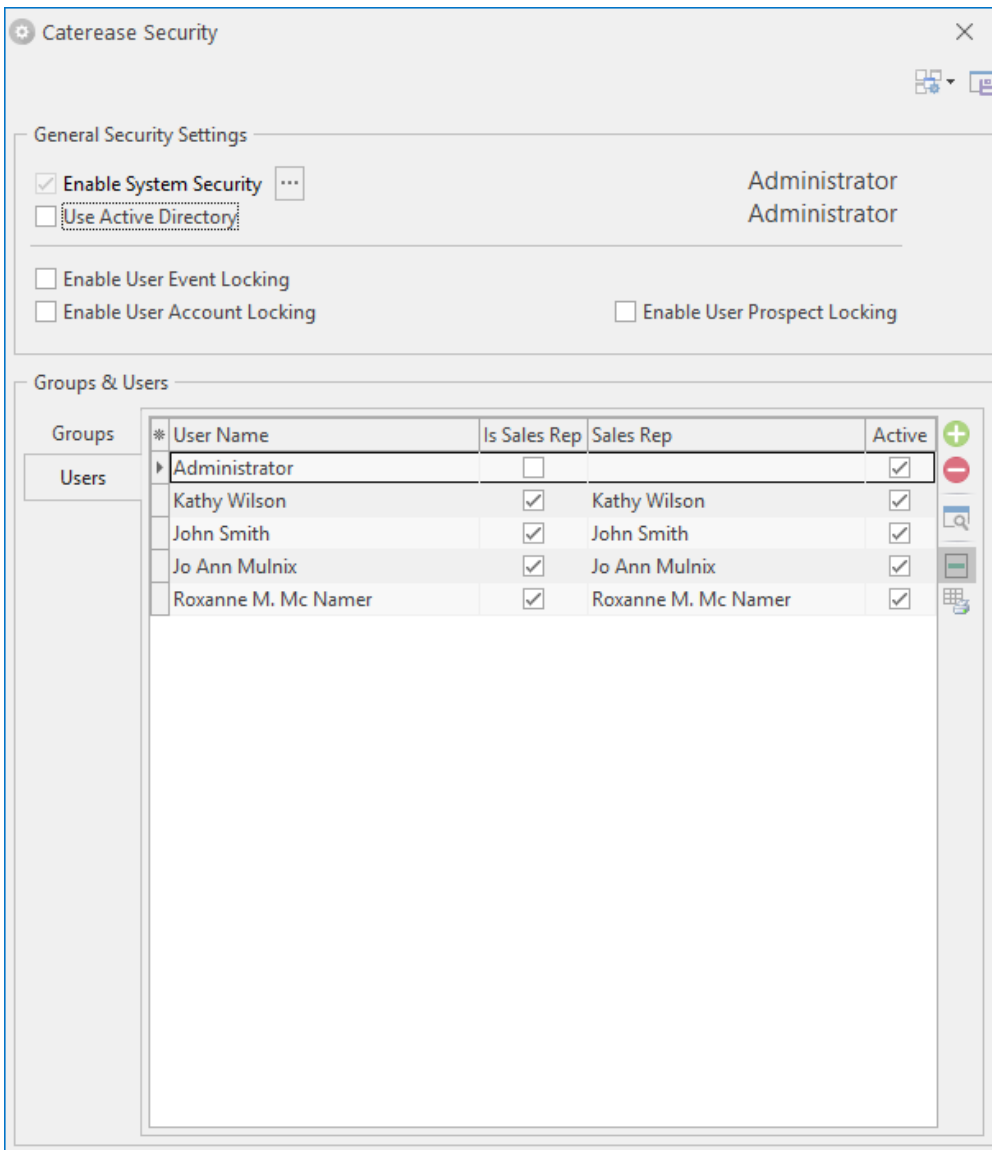
Scratch Pad Comments

Enter in commonly used text to be pulled into any text editor throughout the program.
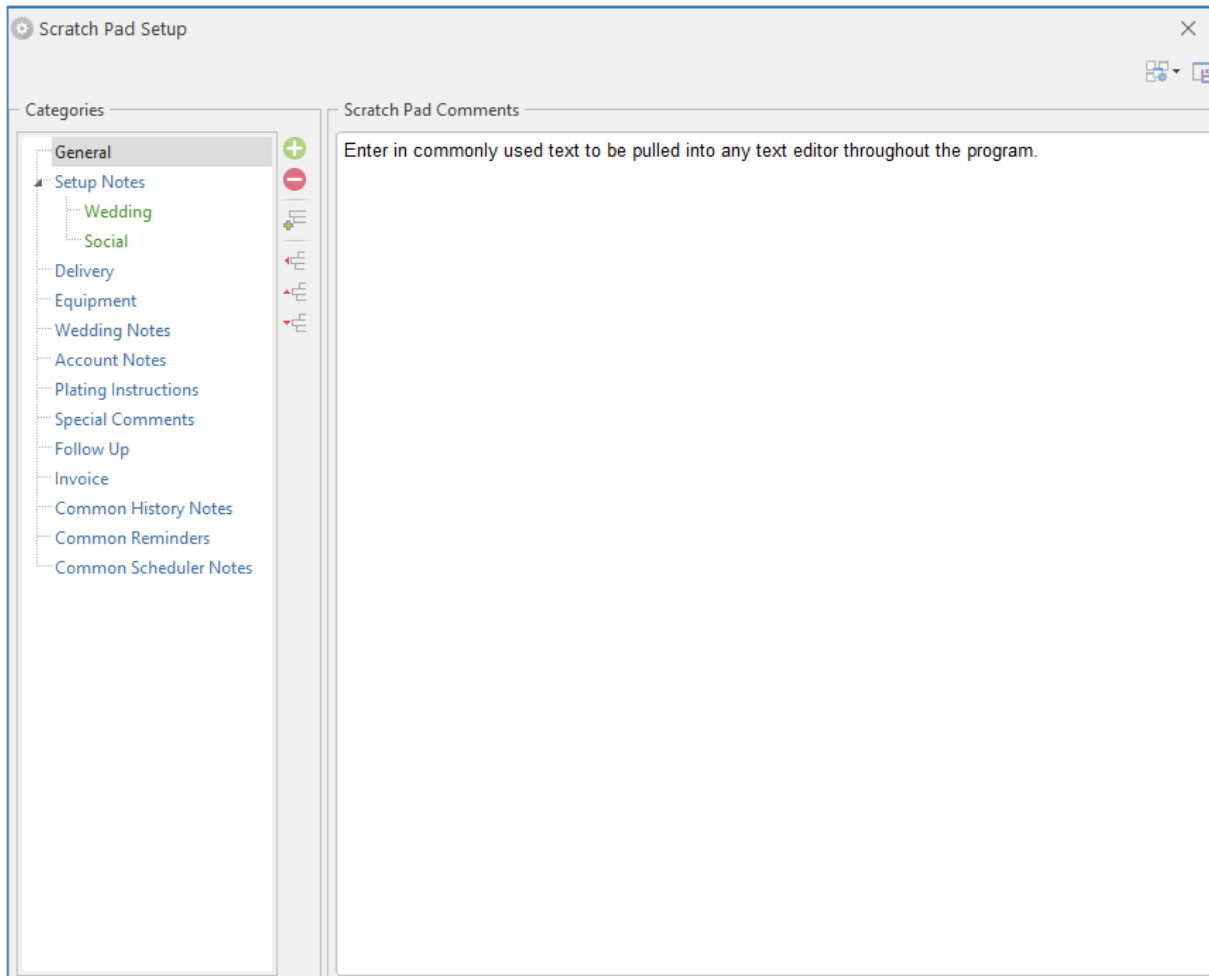
See http://support.caterease.com/16/helpmenu/Setup/Setting_Up_the_Scratch_Pad.htm.

Add Users

1. Click the **Administration** ribbon tab and choose **Security**.
2. Click the **Users** tab.
3. Click the **Add User** button [+], located on the right-hand side of the window.
4. Enter a User Name for the new user.
5. Click the ellipsis button to the right of the Password field to assign a password.
6. Click **Yes** at the confirmation prompt.
7. Enter a password for the user.
   Note: You will be prompted to re-enter the password.
8. Optionally click into the Active Directory Name field and enter the user name for logging into Windows or Caterease Connect.
9. Fill out Contact information (phone, e-mail) as desired.
10. Click **OK**.
11. Click the **Security** tab on the left-hand side of the window and establish security settings.
12. When finished, click **OK**.

See http://support.caterease.com/16/helpmenu/Setup/Security/Adding_a_New_User.htm

Add Sales Reps

1. Click the **Administration** ribbon tab and choose **Security**.
2. Click the **Users** tab.
3. Click the **Add User** button [icon], located on the right-hand side of the window.
4. Enter a User Name for the new user.
5. Click the ellipsis button to the right of the Password field to assign a password.
6. Click **Yes** at the confirmation prompt.
7. Enter a password for the user.
   Note: You will be prompted to re-enter the password.
8. Click **OK**.
9. Enter contact information into the fields provided (Telephone/Cellular/Email).
10. Click into the checkbox labeled **Is A Sales Rep**.
11. Optionally add any notes by clicking the **Notes** tab and typing into the text block.
12. Optionally add a picture by clicking the **Picture** tab and choosing an image.
    Note: Add a picture by right-clicking into the field, selecting **Load From File**, and browsing to the image.
13. When finished, click **OK**.

See http://support.caterease.com/16/helpmenu/Setup/Security/Adding_a_New_User.htm
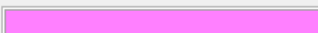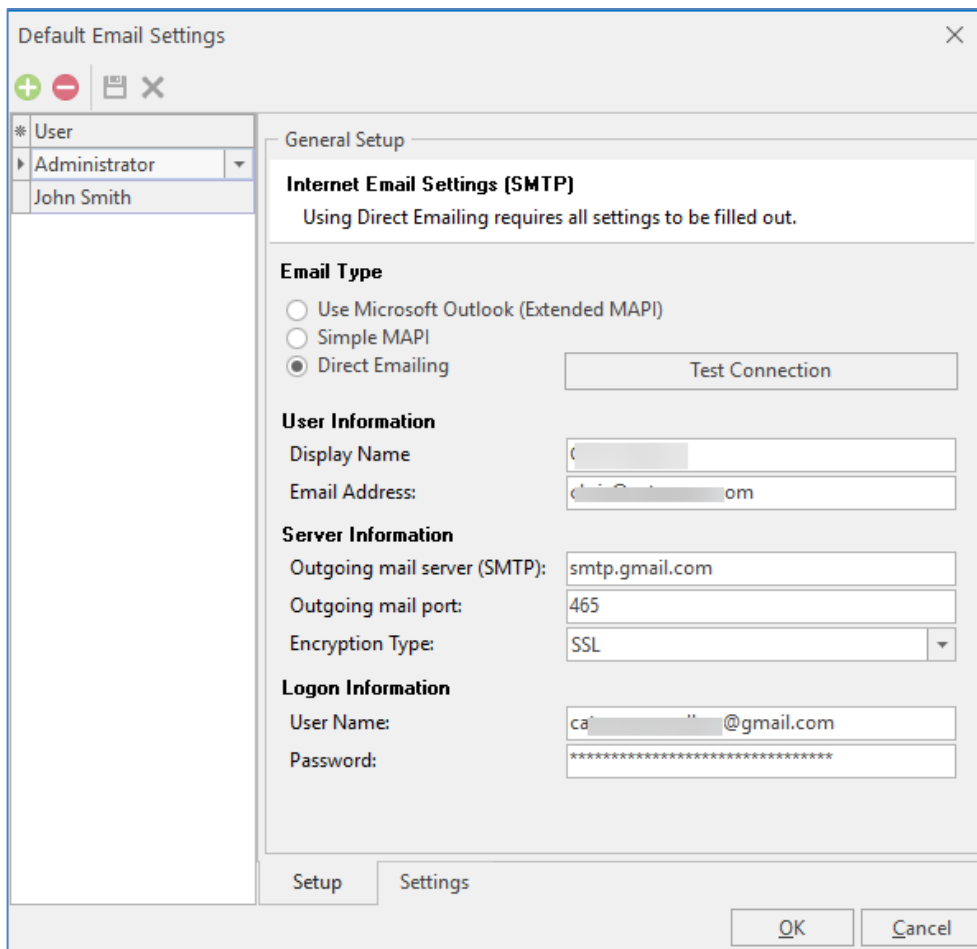
Configure E-mail Settings

1. Click the **Administration** ribbon tab.
2. Click **Settings** > **Email Settings**.
3. Click the **New Record** button ⊕, located at the top left-hand side of the window.
4. Click on the new name in the user list and click the down arrow to the right of the field to select a desired user name.
5. Establish the appropriate e-mail settings in the right-hand pane of the window.
6. Optionally click the **Settings** tab, at the bottom of the window, and enter a signature, default CC List, and default BCC List to be associated with this user.

Default Email Settings ✕

User
▸ Administrator ▾
John Smith

General Setup

Internet Email Settings (SMTP)
   Using Direct Emailing requires all settings to be filled out.

Email Type
   ○ Use Microsoft Outlook (Extended MAPI)
   ○ Simple MAPI
   ⦿ Direct Emailing   [Test Connection]

User Information
   Display Name: ⟨_____⟩
   Email Address: ⟨_____om⟩

Server Information
   Outgoing mail server (SMTP): smtp.gmail.com
   Outgoing mail port: 465
   Encryption Type: SSL ▾

Logon Information
   User Name: ca_____@gmail.com
   Password: ********************************

Setup | Settings

[OK] [Cancel]

See http://support.caterease.com/16/helpmenu/Setup/Establishing_Email_Settings.htm

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Add Default Site Locations

1. Click the **Setup** sidebar.
2. Click the **Site Locations** button.
3. Click the **Add Record** button [+], located in the **Home** ribbon tab at the top of the screen**.**
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new site location and press **[Enter].**
6. Enter additional information into each field.
7. Optionally add a <u>Picture</u>, <u>Description</u>, and <u>Notes</u>.
8. Optionally click the **Directions** tab at the bottom of the window and enter directions to the location, or use the Get Map tool [icon].
9. Optionally click the **Required Items** tab at the bottom of the window and associate required items (packing list) with the site location. For more information, see "Create a Required Items List."
10. Optionally associate Site Commission Rates [icon] to a particular site. *Note: You can fun the Site Commission Rates report (Reports > Financials > Site Location Commissions), totaling the commissions due to each site location for a particular day or date range.*

See http://support.caterease.com/16/helpmenu/Setup/Entering_Site_Locations_into_the_Site_Locations_Database.htm

Set Up Default Timelines

1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Default Timeline Items.**
3. Click the **Add New Timeline** button ⊕ , located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type over the name "New List" to rename your new default timeline, and press **[Enter].**
6. Click the **Add New Timeline Item** button ⊕ , located on the right-hand side of the window, to add a new timeline item.
7. Type a timeline item into the <u>Item</u> field, and press **[Tab]** to move to the next field.
8. Select a <u>Category</u> from the drop-down quickpick list.
9. Optionally type the time for the item to occur, into the <u>Time</u> field.
    Note: You may also click the up-and-down arrows to select the time.
10. Optionally add any timeline notes by typing into the <u>Notes</u> text block.
11. Click **OK**.

> **tip** In addition to various time fields available in Event Manager, you can create a detailed timeline unique to each party. You can create these times on-the-fly from within an event, or select them from default lists.
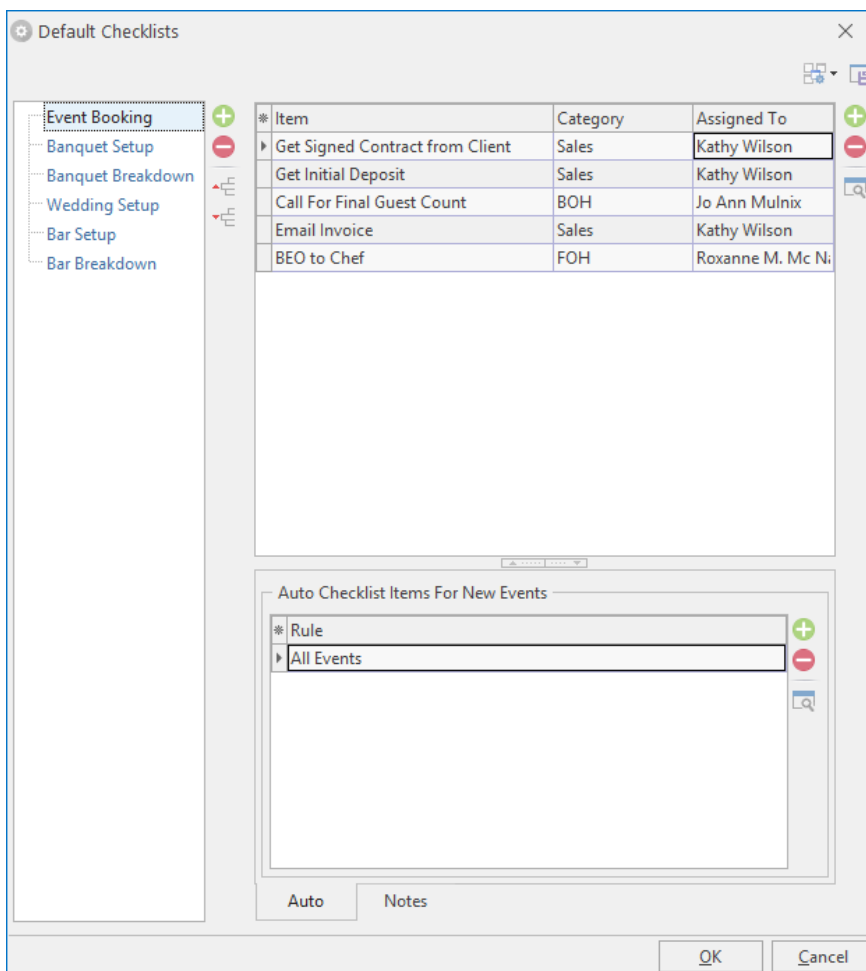
See http://support.caterease.com/16/helpmenu/Setup/Creating_Default_Timeline_Items.htm.

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Set Up Default Checklists

1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Default Checklists.**
3. Click the **Add New Checklist** button , located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type over the name "New Checklist" to rename your new default checklist, and press **[Enter].**
6. Click the **Add New Checklist Item** button , located on the right-hand side of the window, to add a new checklist item.
7. Type a checklist item into the Item field, and press **[Tab]** to move to the next field.
8. Select a Category from the drop-down quickpick list.
9. Click the down arrow to the right of the Assigned To field to select the person responsible for the checklist item.
   Note: You may also type the name directly into the field.
10. Optionally add any checklist notes by typing into the Notes text block, located on the **Notes** tab.
11. Click **OK**.

See http://support.caterease.com/16/helpmenu/Event_Manager/Creating_a_Checklist_of_To-Do_Items.htm

Customize Your Tools Menu and Toolbar

1. Click the **Tools** button, located the **Home** ribbon tab of any Manager (Event Manager, Account Manager, etc.).
2. Click **Customize**, located at the bottom of the **Tools** drop-down menu.
3. To remove a shortcut, click on a shortcut from the Tools Menu Shortcuts pane (left-hand side), hold, then drag to the trashcan icon at the bottom of the window.
4. To add a shortcut, click on a shortcut from the Available Shortcuts pane (right-hand side), and drag and drop into the Tools Menu Shortcuts pane.
5. To reposition buttons, drag and drop them up and down as desired in the list of Tools Menu Shortcuts.
6. When finished, click **OK**.
7. Click the **Save Current Window Settings** button [icon] to save your customizations.

<div style="border:1px solid; padding:10px;">
tip Every Manager has a unique and dynamic Tools Menu and Tools Bar. Any frequently used tools can be made instantly accessible through the Tools Bar, while tools that you use "every so often" can be available in the Tools Menu drop-down list.
</div>

Customize Tools Menu

Tools Menu Shortcuts:
- Merge Documents
- Scratch Pad
- New Reminder
- New Contact History Item
- Reminders & Contact History
- Allergy Information
- Get Map
- Tax Rates
- Base Price Markup Rates...
- Event Discounts
- Payments Made
- Deposits Due
- Event Required Items...
- Event Timeline
- Event Checklist
- Costing Update
- Waitlist
- Costing Summary
- Related Files

Drag a shortcut into the trash can to remove it.

Available Shortcuts:
- General Tools
  - Merge Documents
  - Scratch Pad
  - Get Map
  - Event Checklist
  - Event Required Items...
  - Related Files
  - Copy Event
  - Costing Update
  - Costing Summary
  - Status History
  - Related Events
  - Event Timeline
  - Event Inventory
- Contact Management
- Financials
- Interfacing
- Miscellaneous

OK   Cancel

See http://support.caterease.com/16/helpmenu/General_Information/Customizing the Tools Menu and Tool Bar.htm

Menu Setup/Customization

Customize Food/Service Item Types

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Food/Service Item Types.**
3. Click into the Type field and type the new food/service item type over "N/A**."**
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 item type.
6. Click into the **Associate Charges** area to associate a Room, Labor, Delivery, or Miscellaneous charge to the Item Type.
   Note: You will need to assign tax/service charge rates for the new item type.
7. Drag and drop the item types into the desired position.
8. When finished, click **OK**.

Food/Service Item Types			Associate Charges			
Type	Image	Active	Room	Labor	Delivery	Misc
Food	🍴	☑	☐	☐	☐	☐
Beverage	☕	☑	☐	☐	☐	☐
Liquor	🍸	☑	☐	☐	☐	☐
Equipment	🎤	☑	☐	☐	☐	☐
Labor	👥	☑	☐	☑	☐	☐
Room	🚪	☑	☑	☐	☐	☐
Other	?	☑	☐	☐	☑	☑
NA		☐	☐	☐	☐	☐

See http://support.caterease.com/16/helpmenu/Caterease%20Help.htm#Setup/Setting_Up_Food_Service_Item_Types.htm

Create Your Menu

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. Click the **Add New Menu** button , located on the upper left-hand side of your screen.
4. Click **Yes** at the confirmation prompt.
5. Type a name of the new menu and press **[Enter].**
6. Add a new menu item by clicking the **Add Menu Item** button , located at the top of the Menu Manager window.
7. Type the name of the food/service item into the blank Item Name field, and then press **[Tab].**
8. Fill out the Price, Prep Area, Category, Comment, etc., information as desired.

   Note: Click the **Quick Column Customizing** button , located at the left of the Item Name field, to access optional fields.

9. When finished, click the at the top right-hand side of the window.

See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Adding_a_New_Menu.htm.

Create an Ingredients List

1. Click the **Setup** sidebar.
2. Click the **Ingredient Manager** button.
3. Click the **Add Menu** button ⊕, located on the upper left-hand side of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new ingredients list, and press **[Enter].**
6. Add a new ingredient by clicking the **Add Ingredient** button ⊕, located at the top of the Ingredients List window.
7. Type the ingredient name into the Item Name field, and press **[Tab]** to move to the next field.
8. Enter the Category, Prep Area, Type, and Comment into their respective fields.

    Note: Click the **Quick Column Customizing** button ✳, located at the left of the Item Name field, to access optional fields.

9. When finished, click the ✕ at the top right-hand side of the window.

See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Ingredients Lists.htm.

Assign Ingredients

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. In the left-hand pane of Menu Manager, click on the title of the menu you would like to add an ingredient to.
4. Click the **Recipe** tab, located towards the bottom of the screen.

5. Click the **Select Items** button [icon], located on the right-hand side of the window.
6. Highlight and select desired ingredients.
7. Click into the Qty column and enter a quantity for each ingredient item.

    Note: Click the **Quick Column Customizing** button [icon], located to the left of the Item Name field, to access optional fields.

See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Ingredients Lists.htm.

Create a Required Items List

1. Click the **Setup** sidebar.
2. Click the **Required Items** button.
3. the left-hand pane of the window.
4. Click **Yes** at the confirmation prompt.
5. When finished, click the [X] at the top right-hand side of the window.

tip If a menu item requires certain accessories (chafing dishes, utensils, napkins, plates, etc.), each time it is serviced, you can attach a custom list of those "required items" to that menu item.

See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Required Items Lists.htm

Assign Required Items

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. In the left-hand pane of Menu Manager, click the title of the menu you would
   like to assign a required item to.
4. Click the **Required Items** tab, located towards the bottom of the screen.

5. Click the **Select Items** button [icon] at the right-hand side of the Required Items window.
6. Highlight and select the required items.
7. Enter a Default Qty for your required items.

8. Click the **Quick Column Customizing** button [icon] to access additional columns,
   such as Link, where you can optionally link the quantity of this item to the number of
   corresponding menu items ordered in an event.

> **tip** Whenever you retrieve a menu item (that has "required items" associated with it) into an event, the corresponding list of required items will be retrieved and automatically totaled up based on the quantity of menu items you order.
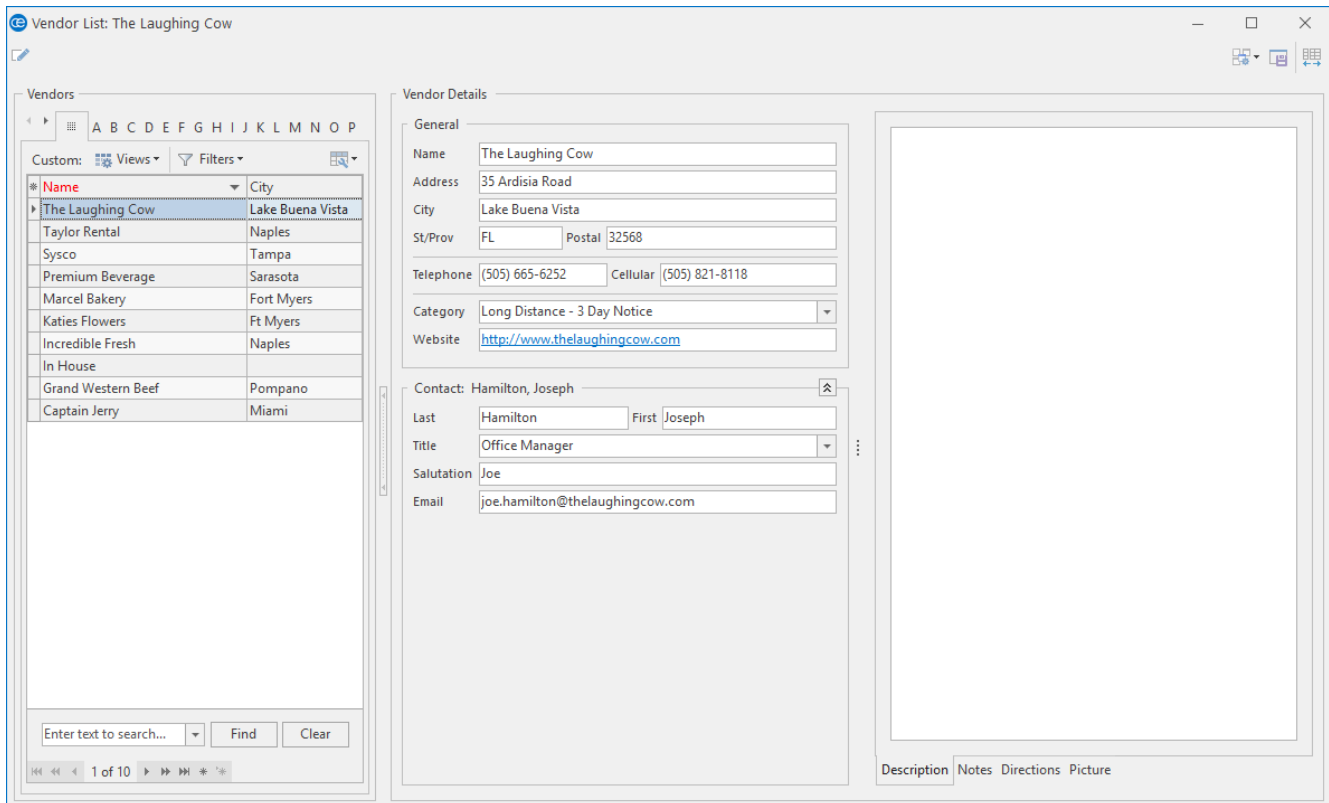

See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Required Items Lists.htm

Add Vendors

1. Click the **Setup** sidebar.
2. Click the **Vendor List** button.
3. Click the **Add Record** button ⊕, located in the **Home** ribbon tab at the top
4. Enter additional information into each field.
5. Optionally add a <u>Description</u>, <u>Notes</u>, <u>Directions</u>, or <u>Picture</u>.

> **tip** Each menu item (or ingredient item) can have a specific vendor associated with it.

See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Creating Default Vendor Lists.htm and

http://support.caterease.com/16/helpmenu/Event_Manager/Printing_Menu_Item_Vendor_Lists.htm

Assign Vendors

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. 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.
   Note: You can also assign vendors to ingredients, in Ingredient Manager.
4. In the main pane of Menu Manager, select the food/service item to assign.
5. Click the **Quick Column Customizing** button, located to the left of the **Item Name** column.
6. Click into the Vendor checkbox to add the Vendor column to your screen display.
7. Click the down arrow to the right of the <u>Vendor</u> field and select an option from your default list.
8. Click the Save **Current Window Settings** button to save this as a default setting every time you open Caterease.

Room/Venue Customization

Add a Master List of Setup Styles

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Setup Styles**.
3. Click the **Add New Setup Style** button ⊕, located at the top of the window.
4. Type a name for the new setup style.
5. Optionally add notes by typing into the **Notes** text block.
6. Optionally add a picture by right-clicking into the **Picture** text block and choosing **Load From File**.

See http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm
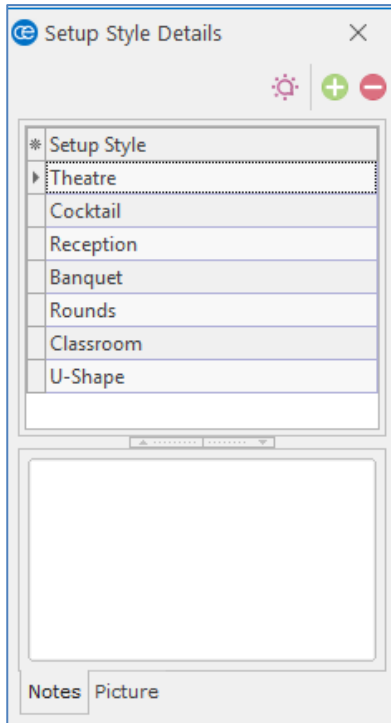
Create Locations to Group Your Rooms (Optional)

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. Click the **Add Location** button ⊕, located at the top left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new location.
6. Optionally click on the ellipsis button and add notes by typing into the **Notes** text block.
7. Optionally add a picture by right-clicking into the **Picture** block and choosing **Load From File**.

See http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm
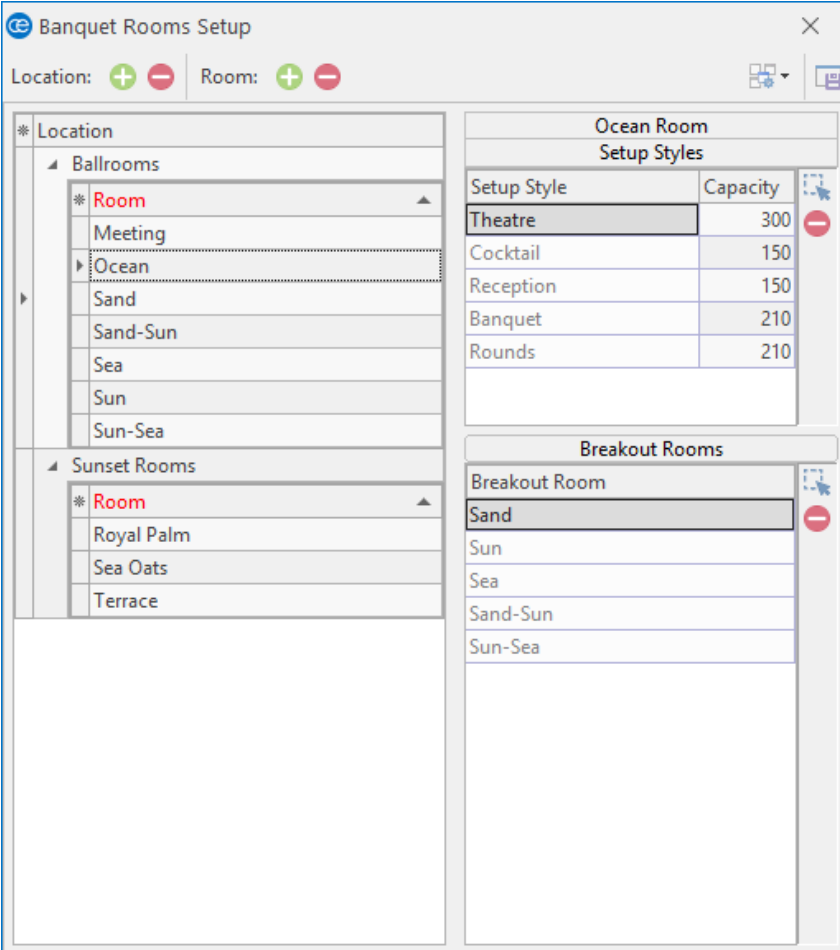
Add Banquet Rooms to Your Locations

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. In the left-hand pane of the window, select the location you want to add a new room to.
4. Click the **Add Room** button ⊕, located at the top left-hand side of the window.
5. Type a name for your new location.

See http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm

Establish Setup Styles and Capacities for a Room

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. In the left-hand pane of the window click on the name of the room you would like to assign a setup style to.
4. Click the **Select Setup Style** button ⬚, located on the upper right-hand side of the window.
5. Double-click on the name of the setup style to select.
6. Type the room capacity into the Capacity field.

See http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm

Staff/Position Setup/Customization
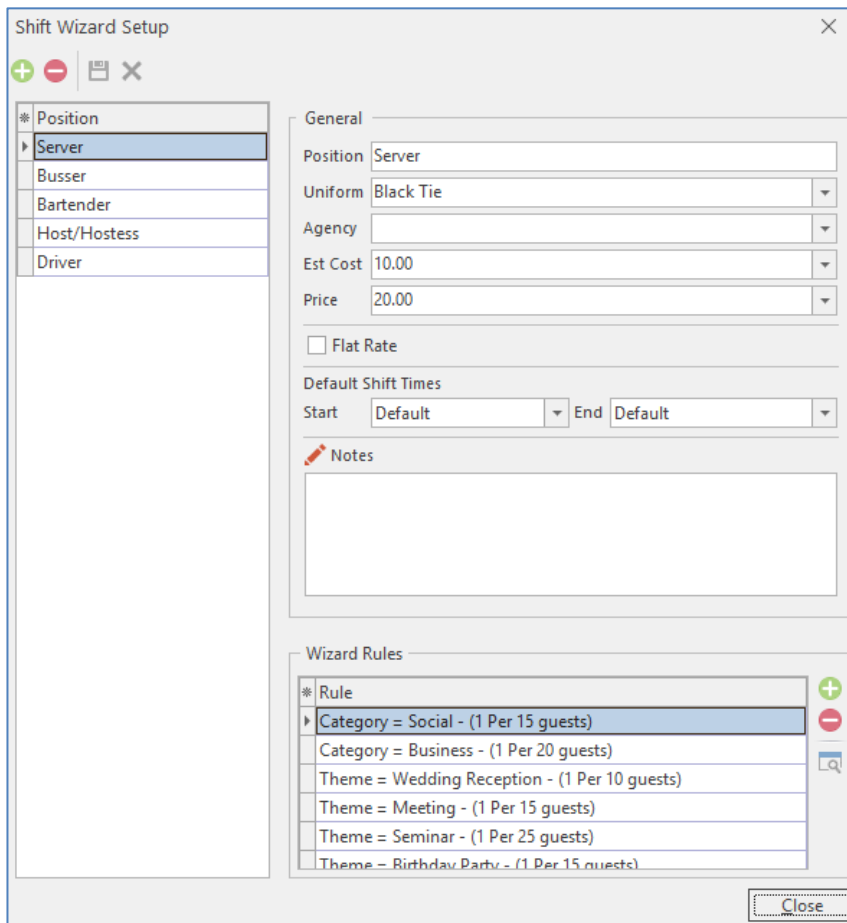
Add Employees

1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button ⊕ , located in the **Home** ribbon tab at the top of the screen**.**
4. Click **Yes** at the confirmation prompt.
5. Type the employee's last name into the <u>Last</u> field, and press **[Tab] or [Enter].**
6. Fill out the remaining **General** tab fields by typing directly into the fields or selecting the desired quickpick item from the drop-down lists.
7. Click the A**ddress** tab and complete the <u>Home Address</u> and <u>Mailing Address</u> fields.
8. When finished, click the **Save Changes** button 💾 , located in the **Home** ribbon tab.
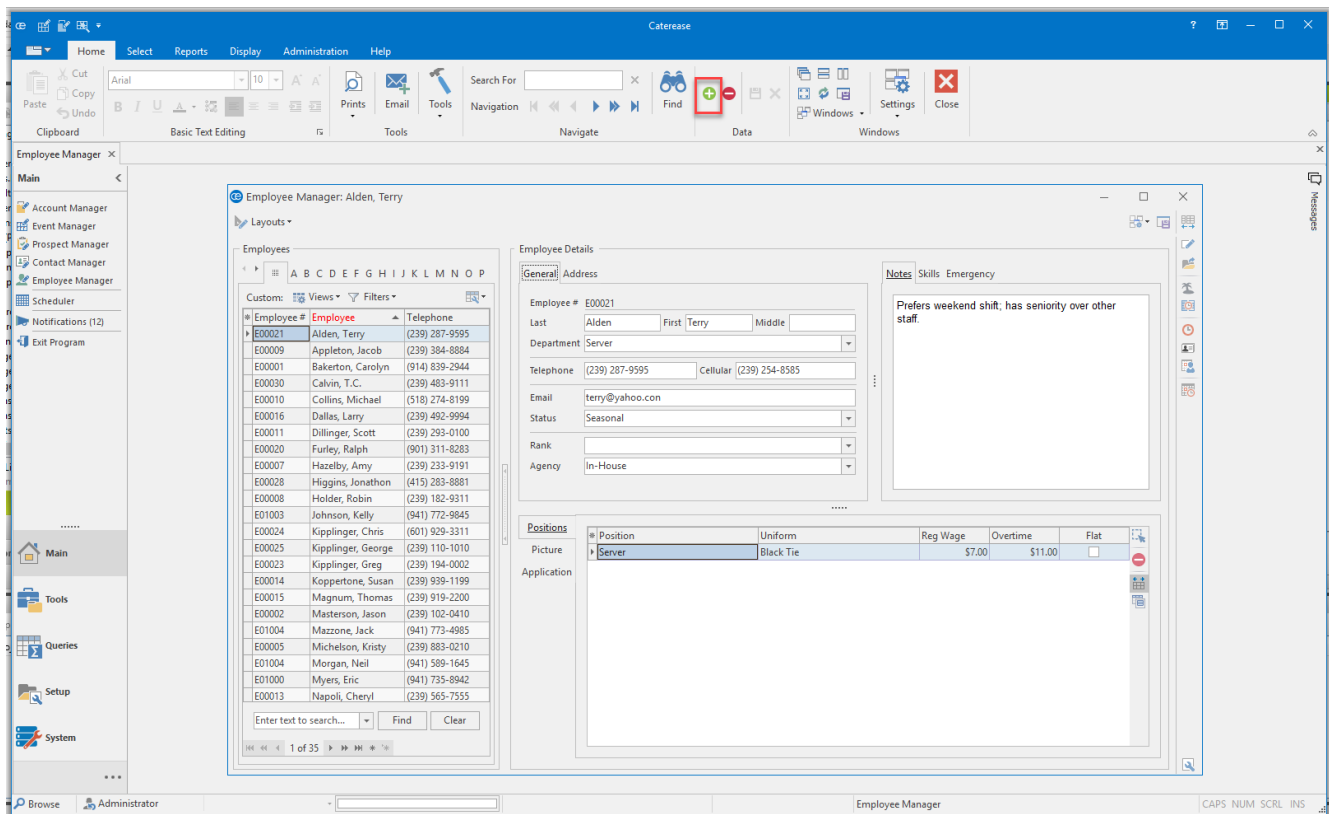
See <u>http://support.caterease.com/16/helpmenu/Setup/Employee_Manager/Creating a Default List of Employees.htm</u>

Add Positions

1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Tools** button and select **Shift Setup.**
4. Click the **Add Position** button ⊕, located at the top left-hand side of the window.
5. Click **Yes** at the confirmation prompt.
6. Type the name of the position into the Position field.
7. Optionally complete the Uniform and Agency fields.
8. Optionally enter an Estimated Cost (Wage) into the Est Cost field.
9. Click into the Price field and type a default price (per hour) for the shift.
10. Optionally click into the Flat Rate checkbox to designate the shift as a flat rate.
    Note: Flat rate is used as an alternative to hourly rate.
11. Optionally select the Default Shift Times by clicking the down arrow to
    the right of each field and selecting from the available options.
12. Optionally enter any desired notes into the Notes text block.
13. Click the **Close** button.

See http://support.caterease.com/16/helpmenu/Setup/Employee_Manager/Creating_Default_Shifts_or_Positions.htm

Assign Positions

1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Positions** tab, located at the bottom of the Employee Manager screen.

4. Click the **Select Positions for Employee** button [icon], located on the right-hand side of the screen.
5. Highlight one or more positions and then click the **Select** button.

6. Click the [X], located on the upper right-hand side of the Select Position window, to close the window.
7. Populate any additional information, such as Uniform and Wage information, as desired.

8. When finished, click the **Save Changes** button [icon], located in the **Home** ribbon tab.

*See *

Global Settings Customization

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **Settings** and choose **Global Settings**.
3. Click a specific tab on the left-hand side of the window to edit settings related to that area of the program.
4. When finished, click **OK**.

See http://support.caterease.com/16/helpmenu/Setup/Editing_Global_Settings.htm

tip The Global Settings feature allows you to change certain settings in the program and affect all users on your Caterease network. Settings here include general regional and field settings, as well as a variety of other miscellaneous settings.