

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 Food field within the Tax 1 column.
4. Repeat as desired to enter default tax rates for all other item types.
5. Optionally continue to add rates into the Tax 2 and Tax 3 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**.



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	<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	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

Subtotal:

Tax 1:

Tax 2:

Tax 3:

Gratuity:

Serv Chg:

Item Codes

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.)*



Many fields in Caterease can be renamed using the steps described here. For example, you might prefer the name "Booking Agent" to Sales Rep, or "Scheduled Tables" to Scheduled Event Items. You can also use this area to rename event time and guest fields.

Section	Field Name	Current Name	New Name
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			

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**.



You can create user-defined fields to keep track of information (about your clients, events, menu items, etc.), that is unique to your company. These fields can be displayed anywhere in their respective areas of the program or on prints.


User-Defined Fields

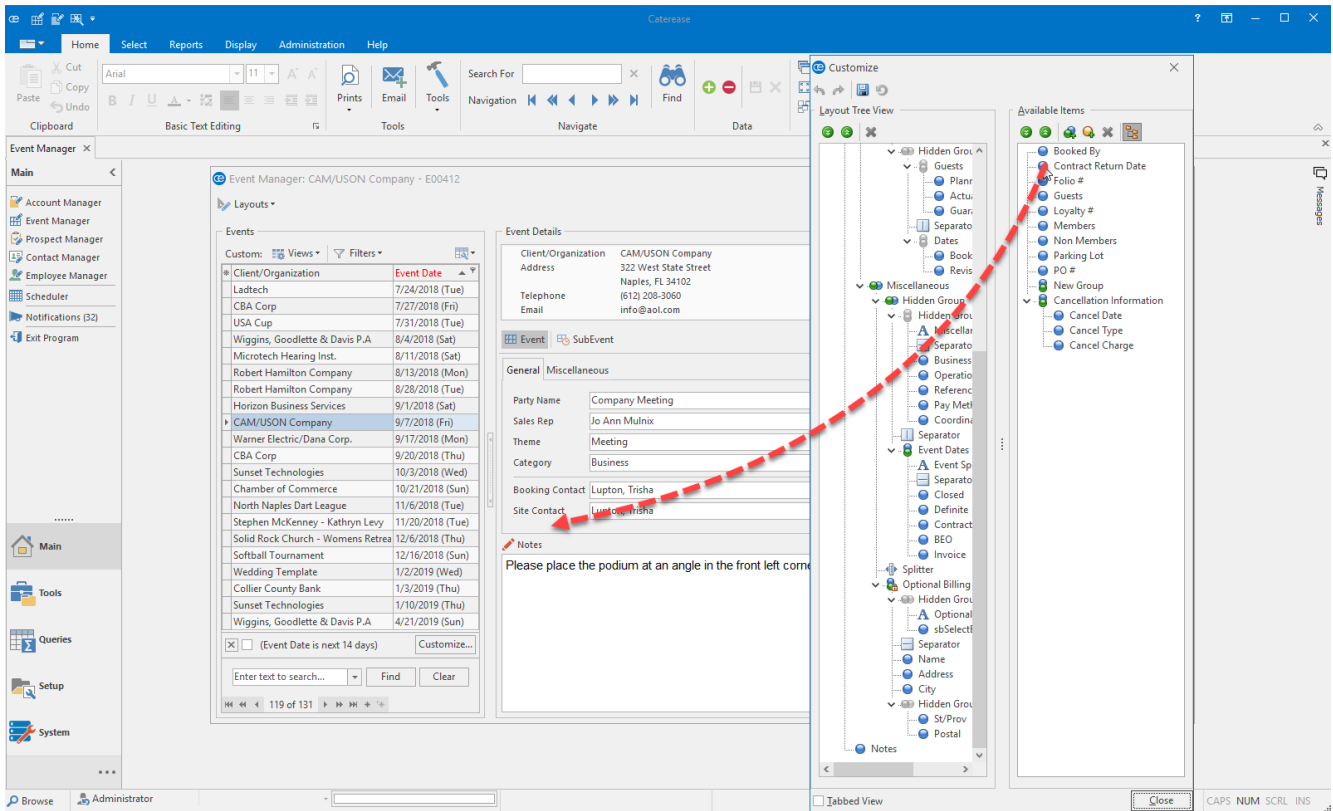
	Name Of Field	Type	
Accounts	1 Contact Type Preference	Text	X
Contacts	2 Contact Time Preference	Text	X
Events	3 NA	Phone	
SubEvents	4 NA	Number	
Menu Items	5 NA	Currency	
Employees	6 NA	Date	
Site Locations	7 NA	Time	
Guestrooms	8 NA	Text	X
Reminders	9 NA	Text	X
Contact History	10 NA	Text	X
Vendors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

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.



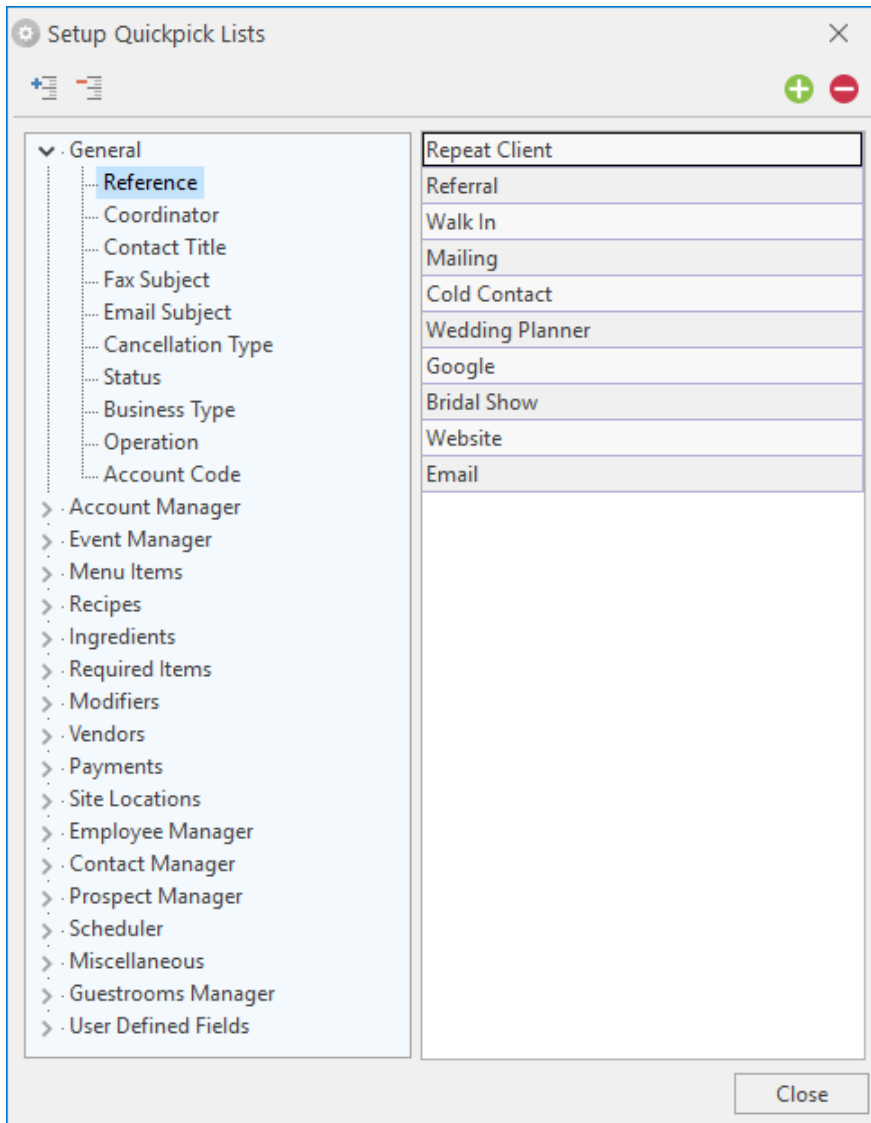
See <http://support.catrease.com/16/helpmenu/Account Manager/Making Up Your Own Fields in Account Manager.htm>

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**.



Various drop-down lists are available throughout Caterease, from which you can choose from a list of options, or “quickpicks.” Quickpicks allow you to keep your data entry consistent among users. Note: You can add quickpicks to User-Defined fields.



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**.



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.

Accounts	Status	Tentative
Contacts	Sales Rep	(Current Sales Rep)
Events	Coordinator	
Employees	Theme	Banquet
SubEvents	Reference	
Prospects	Category	Social
Guestrooms	Pay Method	Credit Card
	Business Type	On-Premise
	Operation	Riverside Banquet Center
	Default From Account Fields	
	Party Name From Client/O...	<input checked="" type="checkbox"/>
	Booking Contact	<input checked="" type="checkbox"/>
	Site Contact	<input checked="" type="checkbox"/>
	Notes	<input checked="" type="checkbox"/>
	Allergy	<input checked="" type="checkbox"/>
	Miscellaneous	
	Base Price Markup	

OK Cancel

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

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**.



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.

Required Fields

Accounts
Prospects
Events
Guestrooms

Conditional Group

- Condition
- Business Type = Delivery
- Business Type = On-Premise
- Business Type = Wedding
- All Events

Required Fields



- General**
 - Event Date ☒
 - Party Name ☐
 - Theme ☐
 - Category ☐
 - ▶ Booking Contact ☒
 - ▶ Site Contact ☐
- Miscellaneous**
 - Sales Rep ☐
 - Coordinator ☐
 - Reference ☐
 - Business Type ☐
 - Operation ☐
 - Pay Method ☐
 - Loyalty # ☐
 - Parking Lot ☐
 - Contract Return Date ☐
- ▶ **Guests**
- ▶ **Optional Billing Information**
- ▶ **SubEvents**
- ▶ **Additional**

Events SubEvents

OK Cancel

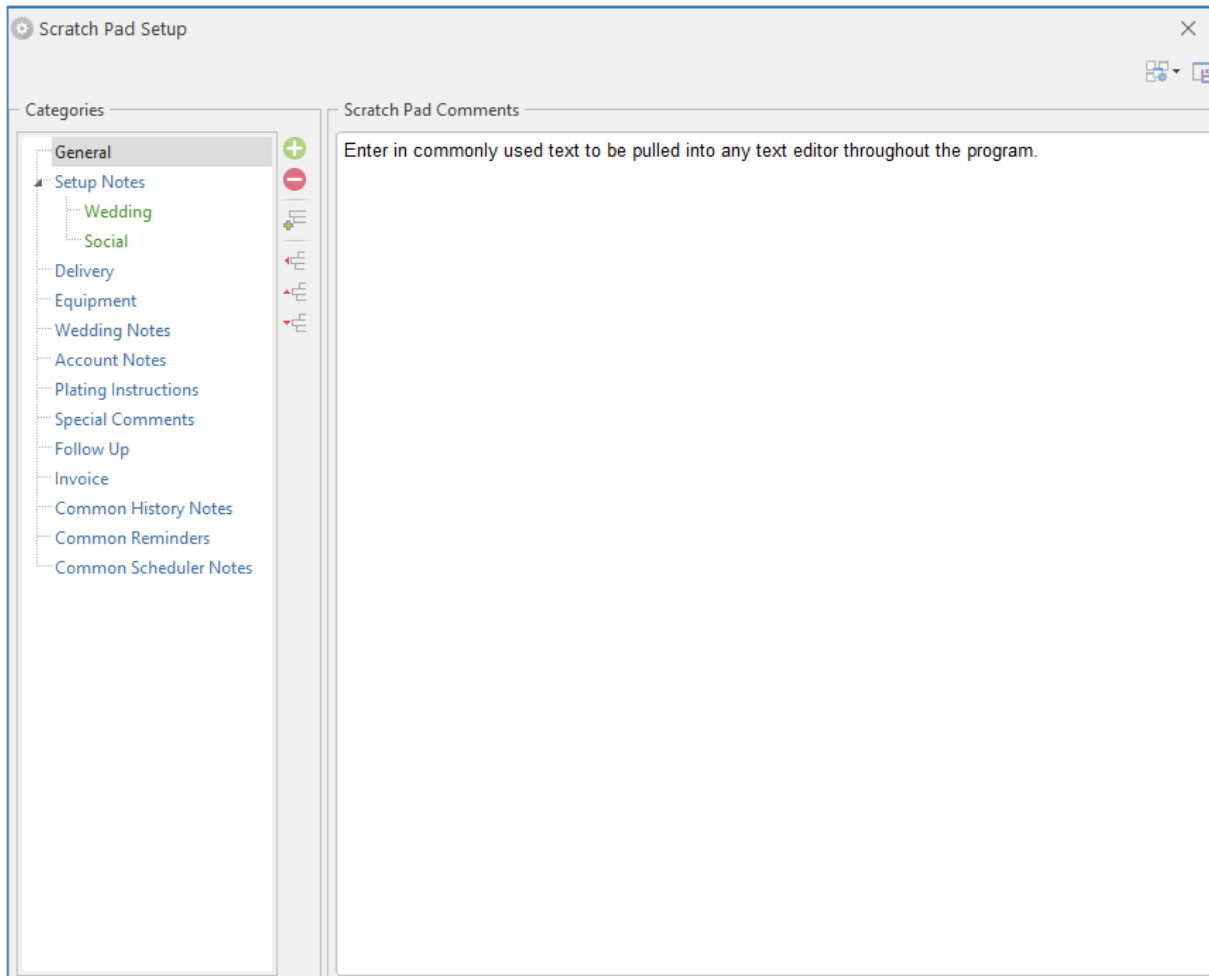
See http://support.caterease.com/16/helpmenu/Setup/Making_Fields_Required.htm.

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.


tip

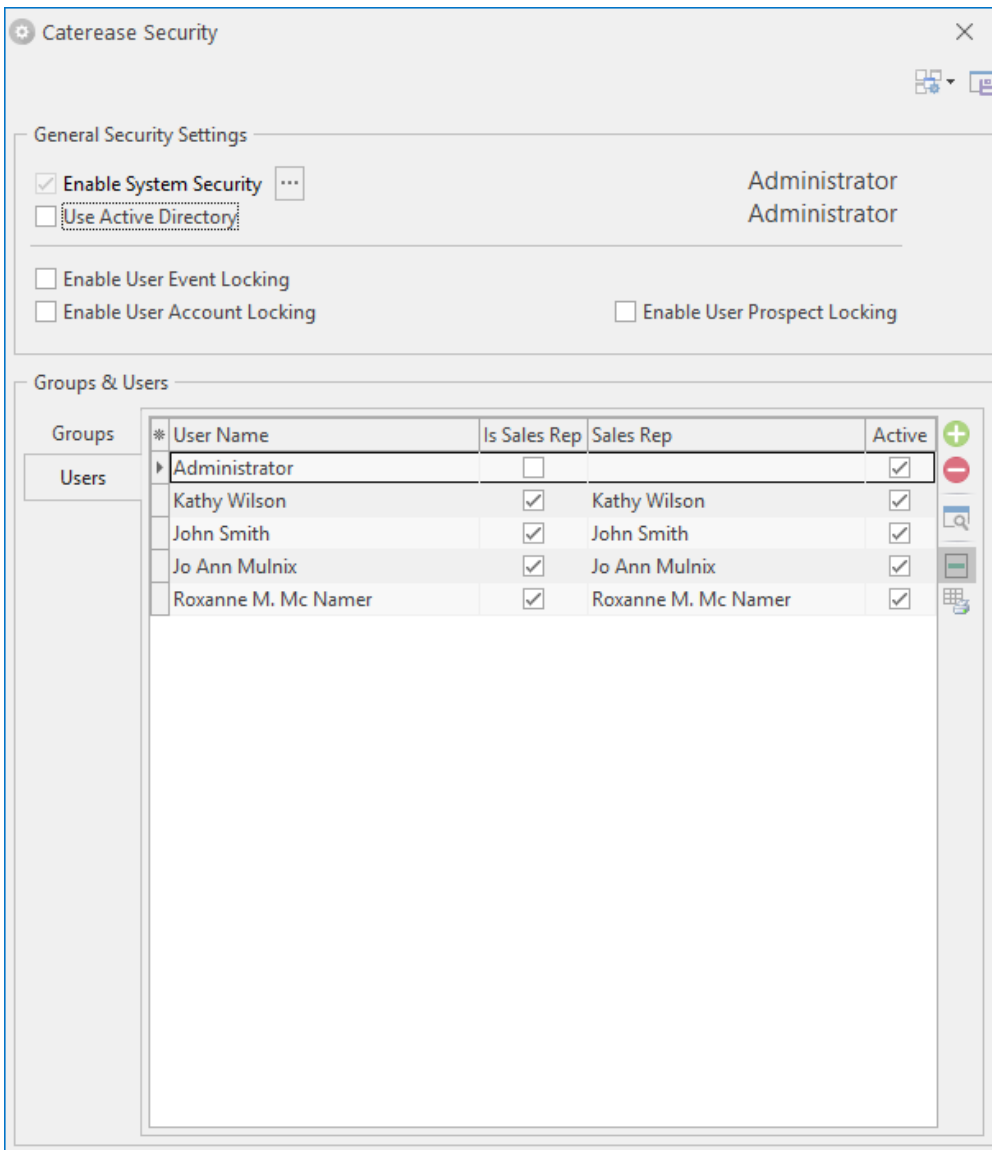
You can avoid repetitive typing by storing large amounts of commonly used text, such as Comments, Notes, special requests, etc., into the Scratch Pad.



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**.




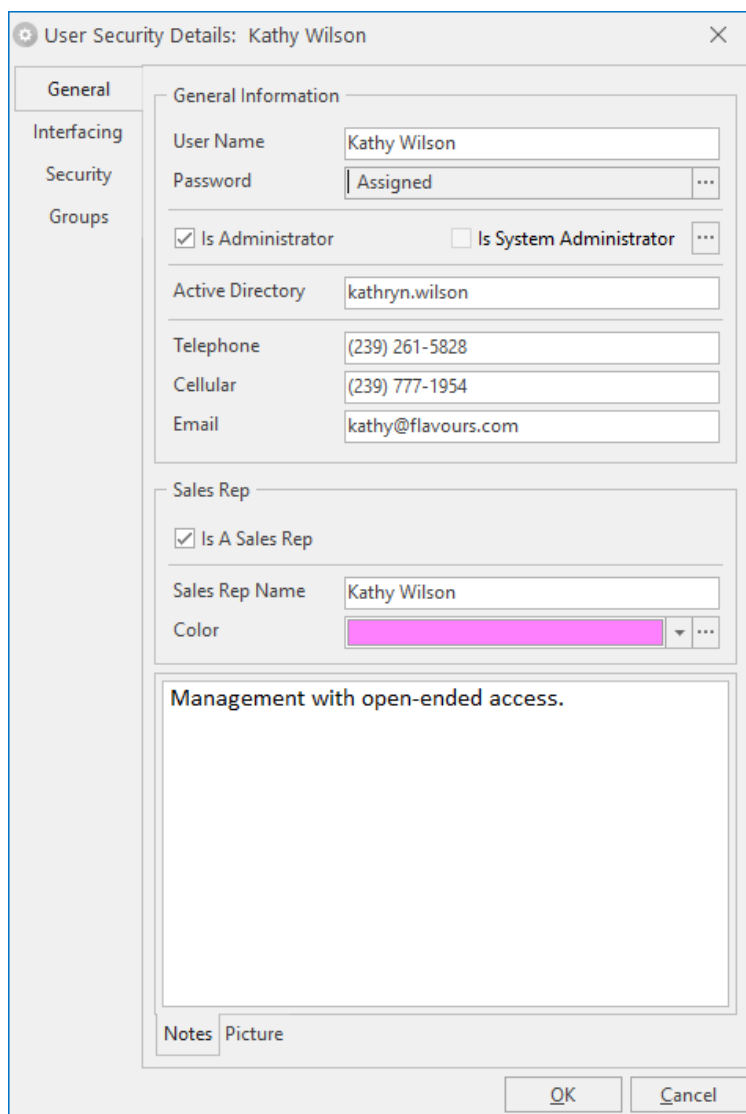
The screenshot shows the 'Caterease Security' window. The 'General Security Settings' section includes checkboxes for 'Enable System Security' (checked), 'Use Active Directory' (unchecked), 'Enable User Event Locking' (unchecked), 'Enable User Account Locking' (unchecked), and 'Enable User Prospect Locking' (unchecked). The 'Administrator Administrator' label is visible. The 'Groups & Users' section shows a table with columns: * User Name, Is Sales Rep, Sales Rep, and Active. The table lists five users: Administrator, Kathy Wilson, John Smith, Jo Ann Mulnix, and Roxanne M. Mc Namer. The 'Active' column for all users is checked. A sidebar on the left shows 'Groups' and 'Users' tabs, with 'Users' selected.

* User Name	Is Sales Rep	Sales Rep	Active
Administrator	<input type="checkbox"/>		<input checked="" type="checkbox"/>
Kathy Wilson	<input checked="" type="checkbox"/>	Kathy Wilson	<input checked="" type="checkbox"/>
John Smith	<input checked="" type="checkbox"/>	John Smith	<input checked="" type="checkbox"/>
Jo Ann Mulnix	<input checked="" type="checkbox"/>	Jo Ann Mulnix	<input checked="" type="checkbox"/>
Roxanne M. Mc Namer	<input checked="" type="checkbox"/>	Roxanne M. Mc Namer	<input checked="" type="checkbox"/>

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 , 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**.



User Security Details: Kathy Wilson

General

General Information

User Name: Kathy Wilson

Password: Assigned ...

☒ Is Administrator ☐ Is System Administrator ...

Active Directory: kathryn.wilson

Telephone: (239) 261-5828

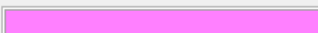
Cellular: (239) 777-1954

Email: kathy@flavours.com

Sales Rep

☒ Is A Sales Rep

Sales Rep Name: Kathy Wilson

Color:  ...


Management with open-ended access.

Notes Picture

OK Cancel

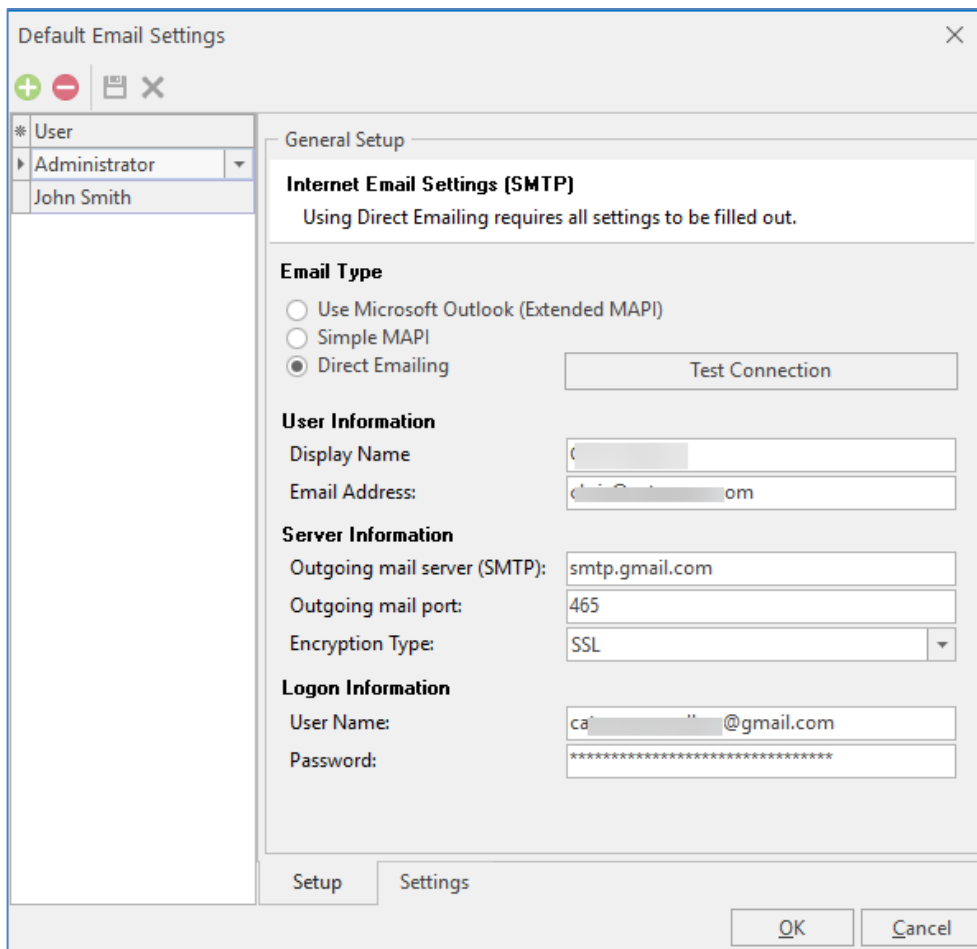
See <http://support.caterease.com/16/helpmenu/Setup/Security/Adding a New User.htm>

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.






Each Caterease user can have his/her own unique e-mail settings, determining which e-mail account Caterease e-mails are sent through, as well as other options, such as a default signature.



The screenshot shows the 'Default Email Settings' dialog box. On the left, there is a 'User' list with 'Administrator' and 'John Smith'. The 'General Setup' tab is active, showing 'Internet Email Settings (SMTP)' with a note: 'Using Direct Emailing requires all settings to be filled out.' Under 'Email Type', 'Direct Emailing' is selected. A 'Test Connection' button is present. Under 'User Information', 'Display Name' and 'Email Address' fields are shown. Under 'Server Information', 'Outgoing mail server (SMTP):' is 'smtp.gmail.com', 'Outgoing mail port:' is '465', and 'Encryption Type:' is 'SSL'. Under 'Logon Information', 'User Name:' is 'ca...' and 'Password:' is masked with asterisks. At the bottom, there are 'Setup' and 'Settings' tabs, and 'OK' and 'Cancel' buttons.

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

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 Picture, Description, and Notes.
8. Optionally click the **Directions** tab at the bottom of the window and enter directions to the location, or use the Get Map tool .
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  to a particular site. *Note: You can run 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.*



Use this tool to establish a default site location for a client. Any details you enter here will default as the site location details for any new event created for this client.

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
Museum	Naples

Enter text to search... Find Clear

1 of 4

Site Location Details

General

Name: Cambier Park

Address: 735 8th St S

City: Naples

St/Prov: FL Postal: 34102

Telephone: (239) 595-0550 Cellular: () -

Category: Outdoor

Website: www.cambier.com


Tax Schedule: [icon] [icon]

Description

Amenities include:



- Open-air band shell
- Community-built playground
- Covered pavilion
- Ample parking
- Clay tennis courts

Notes Directions Picture Required Items



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 Item field, and press **[Tab]** to move to the next field.
8. Select a Category from the drop-down quickpick list.
9. Optionally type the time for the item to occur, into the Time 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 Notes text block.
11. Click **OK**.



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.

Default Timeline Items

Off Site Prep
Wedding Reception
General Event

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▼

* Item	Category	Time
▶ Bar Opens	Front of House	
Guests Arrive	Customer	
Passed Hors D'oeuvres	Front of House	
Meal Service	Front of House	
Best Man Toast	Customer	
First Dance	Customer	
Father/Daughter Dance	Customer	
Cake Cutting	Customer	

+

-

☰

Notes



OK
Cancel

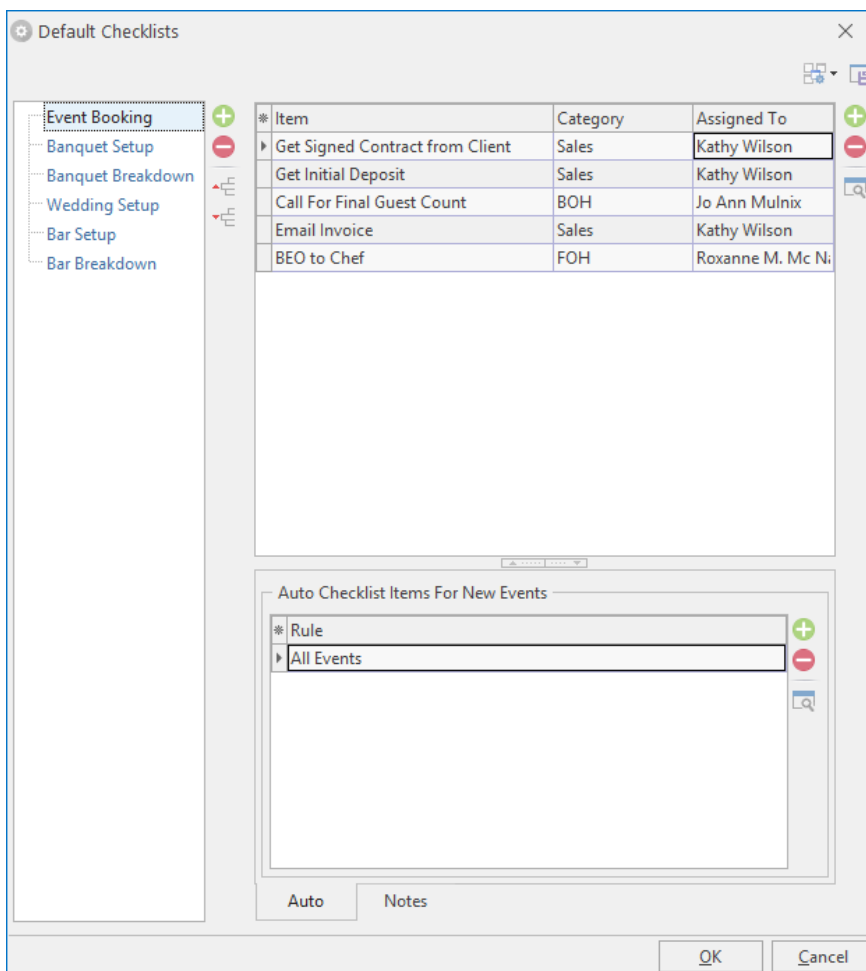
See http://support.caterease.com/16/helpmenu/Setup/Creating_Default_Timeline_Items.htm.

Set Up Default Checklists



You can create a checklist of "to-do" items for your various events, either selecting from default lists of tasks or adding a custom task on-the-fly.

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**.



#	Item	Category	Assigned To
1	Get Signed Contract from Client	Sales	Kathy Wilson
2	Get Initial Deposit	Sales	Kathy Wilson
3	Call For Final Guest Count	BOH	Jo Ann Mulnix
4	Email Invoice	Sales	Kathy Wilson
5	BEO to Chef	FOH	Roxanne M. Mc Ni

Auto Checklist Items For New Events


Rule: All Events

Auto Notes

OK Cancel

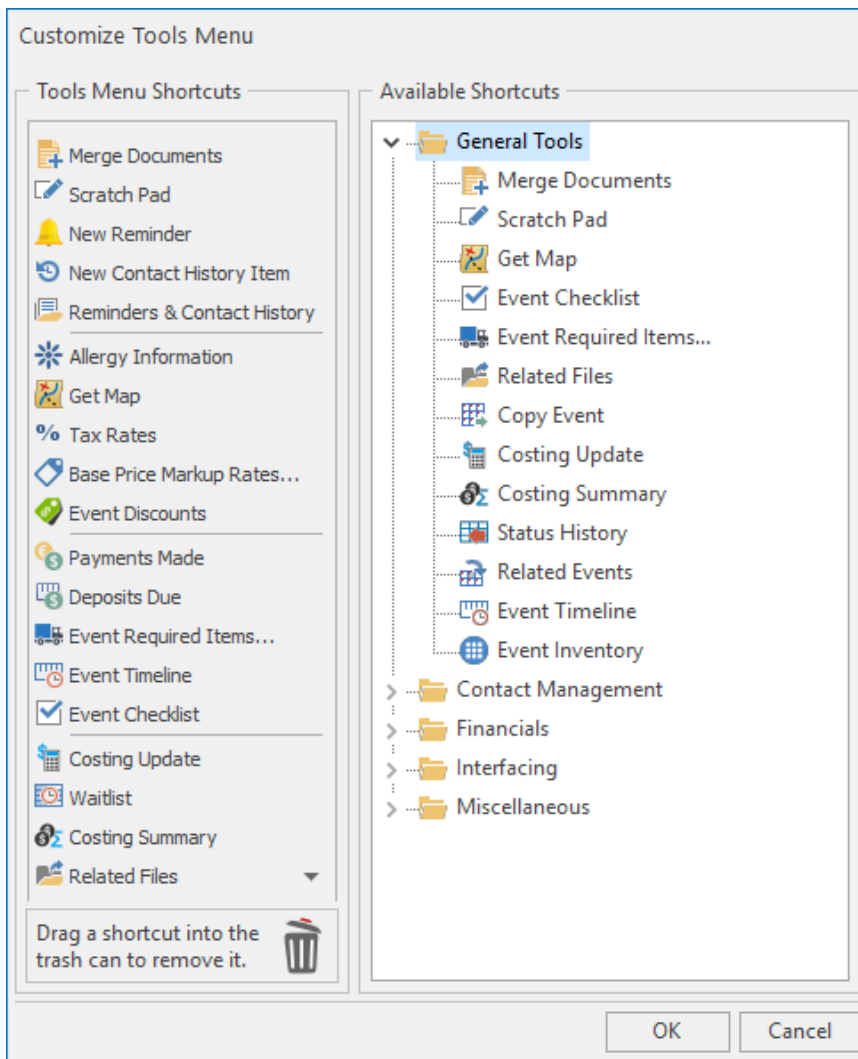
See http://support.caterease.com/16/helpmenu/Event_Manager/Creating_a_Checklist_of_To-Do_Items.htm

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  to save your customizations.



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.



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		<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"/>

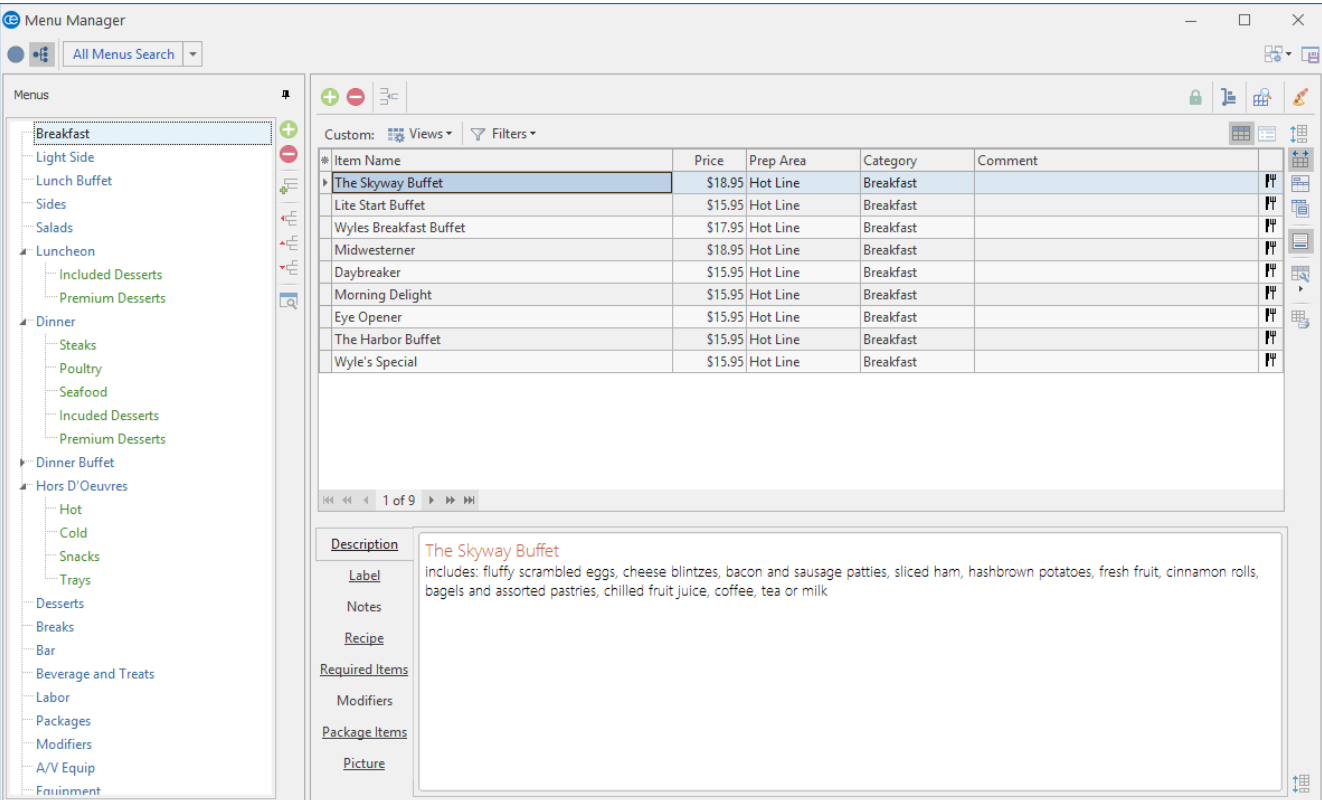
See http://support.caterease.com/16/helpmenu/Caterease%20Help.htm#Setup/Setting_Up_Food_Service_Item_Types.htm

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 ,
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.





The screenshot shows the 'Menu Manager' application window. On the left is a sidebar with a tree view of menu categories: Breakfast, Lunch Buffet, Sides, Salads, Luncheon, Dinner, Dinner Buffet, and Hors D'Oeuvres. The main area displays a table of menu items. The item 'The Skyway Buffet' is selected, and its details are shown in a panel at the bottom.


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	


Description The Skyway Buffet
includes: fluffy scrambled eggs, cheese blintzes, bacon and sausage patties, sliced ham, hashbrown potatoes, fresh fruit, cinnamon rolls, bagels and assorted pastries, chilled fruit juice, coffee, tea or milk

See http://support.catarease.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.




To select ingredients for each of your menu items in your default menus, you must first create a master list of ingredients from which to choose.


The screenshot shows the 'Ingredient Manager' window. On the left is a sidebar with 'Ingredient Menus' including Dairy, Dry Goods, Meats, Seafood, Produce, Baked Goods, Sauces-Oils, Beverages, Soups, and Misc. The main area displays a table of ingredients with columns: Item Name, Category, Prep Area, Type, and Comment. The table lists 16 items, mostly dairy products. At the bottom, there are three panels: 'Units' (Sub-Recipe, Notes), 'Item Details' (for 'Cream'), and 'Item Specific Units'. The 'Item Details' panel shows fields for Item Name, Revised date, Revised By, Unit Type (Volume), Proc. Unit (Pint), Qty (1), Cost (\$0.89), and Default Unit (Pint). The 'Item Specific Units' panel is empty, showing '<No data to display>'. Navigation controls at the bottom of the table show '1 of 16'.

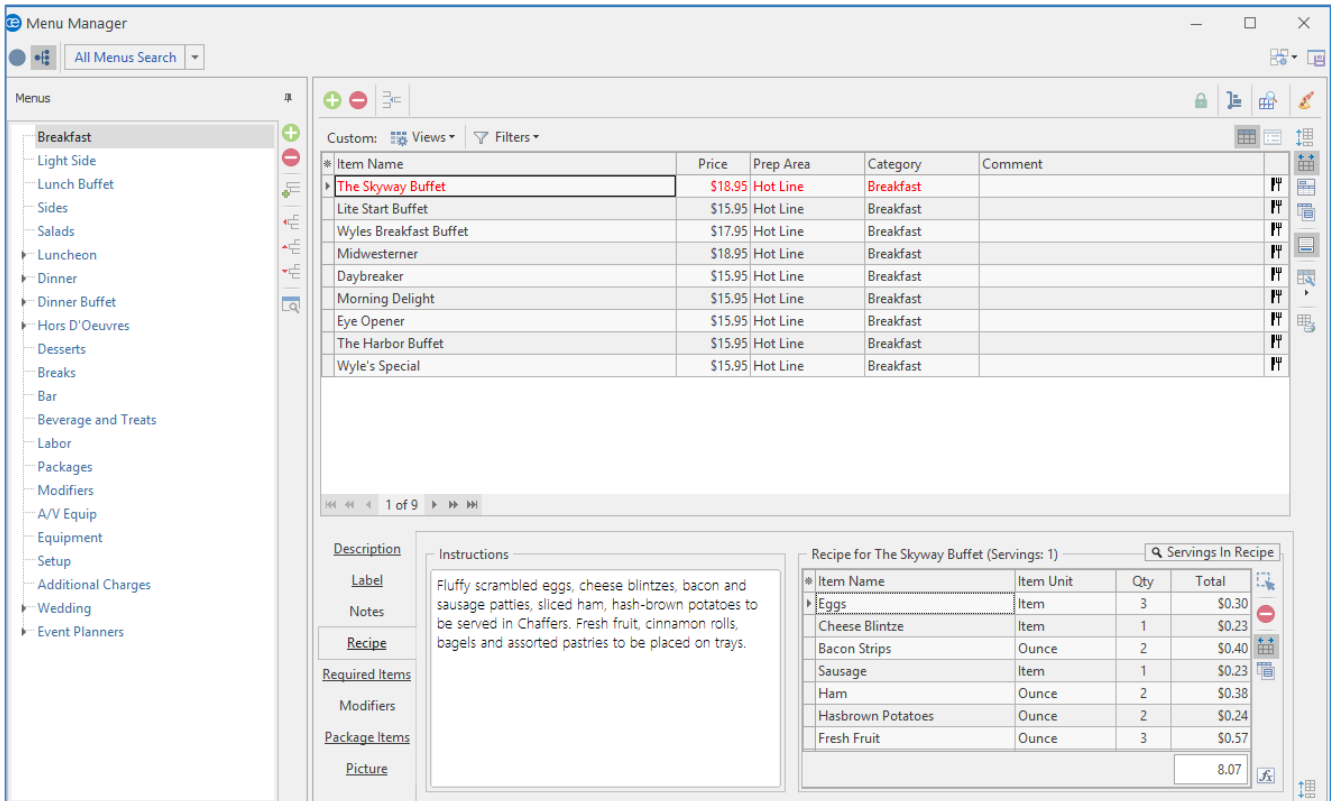
Item Name	Category	Prep Area	Type	Comment
Cream	Dairy		Dairy	
Butter	Dairy		Dairy	
Parmesan Cheese	Dairy		Dairy	
Eggs	Dairy		Entree	
Milk	Dairy		Dairy	
Cream Cheese	Dairy		Dairy	
Assorted Cheeses HD'S	Dairy		Appetizers	
Swiss Cheese	Dairy		Dairy	
Cheddar Cheese	Dairy		Dairy	
Vanilla Ice Cream	Dairy	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

See http://support.catarease.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 , 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 , located to the left of the Item Name field, to access optional fields.



The screenshot shows the Menu Manager application window. On the left is a sidebar with a tree view of menu categories: Breakfast, Light Side, Lunch Buffet, Sides, Salads, Luncheon, Dinner, Dinner Buffet, Hors D'Oeuvres, Desserts, Breaks, Bar, Beverage and Treats, Labor, Packages, Modifiers, A/V Equip, Equipment, Setup, Additional Charges, Wedding, and Event Planners. The 'Breakfast' category is selected. The main area displays a table of menu items. The 'Recipe' tab is active at the bottom. The recipe for 'The Skyway Buffet' is shown, including a list of ingredients with their quantities and prices, and a total cost of 8.07.


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	

Recipe for The Skyway Buffet (Servings: 1)

Item Name	Item Unit	Qty	Total
Eggs	Item	3	\$0.30
Cheese Blintze	Item	1	\$0.23
Bacon Strips	Ounce	2	\$0.40
Sausage	Item	1	\$0.23
Ham	Ounce	2	\$0.38
Hasbrown Potatoes	Ounce	2	\$0.24
Fresh Fruit	Ounce	3	\$0.57
			8.07

See http://support.catarease.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  at the top right-hand side of the window.



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.

Required Items

All Menus Search

Required Item Menus

- General
- Trays and Platters
- Utensils
- Carts
- Tables
- Linen Tablecloths
- Chairs



Custom: Views Filters

Item Name	Packing Unit	Category	Comment	Vendor
Beverage Tub - 7.25 Gallon	Crate	Equipment		
8 Quart Chafing Dish	Crate	Equipment		
Dinner Plate	Case	Tableware		
Napkin	Box	Linen		
Silverware Set	Box	Tableware		
Water Goblet	Crate	Tableware		
Chaffer	Crate	Equipment		
Claw Cracker	Box	Equipment		
Salad Bowl	Case	Equipment		
Salad Plate	Case	Equipment		
Paper Coffee cups	Box	Equipment		
Ceramic Coffee cups	Case	Equipment		
Side Plate	Case	Equipment		
Glass Bowl	Case	Equipment		
Glass Side Plate	Case	Equipment		

1 of 15

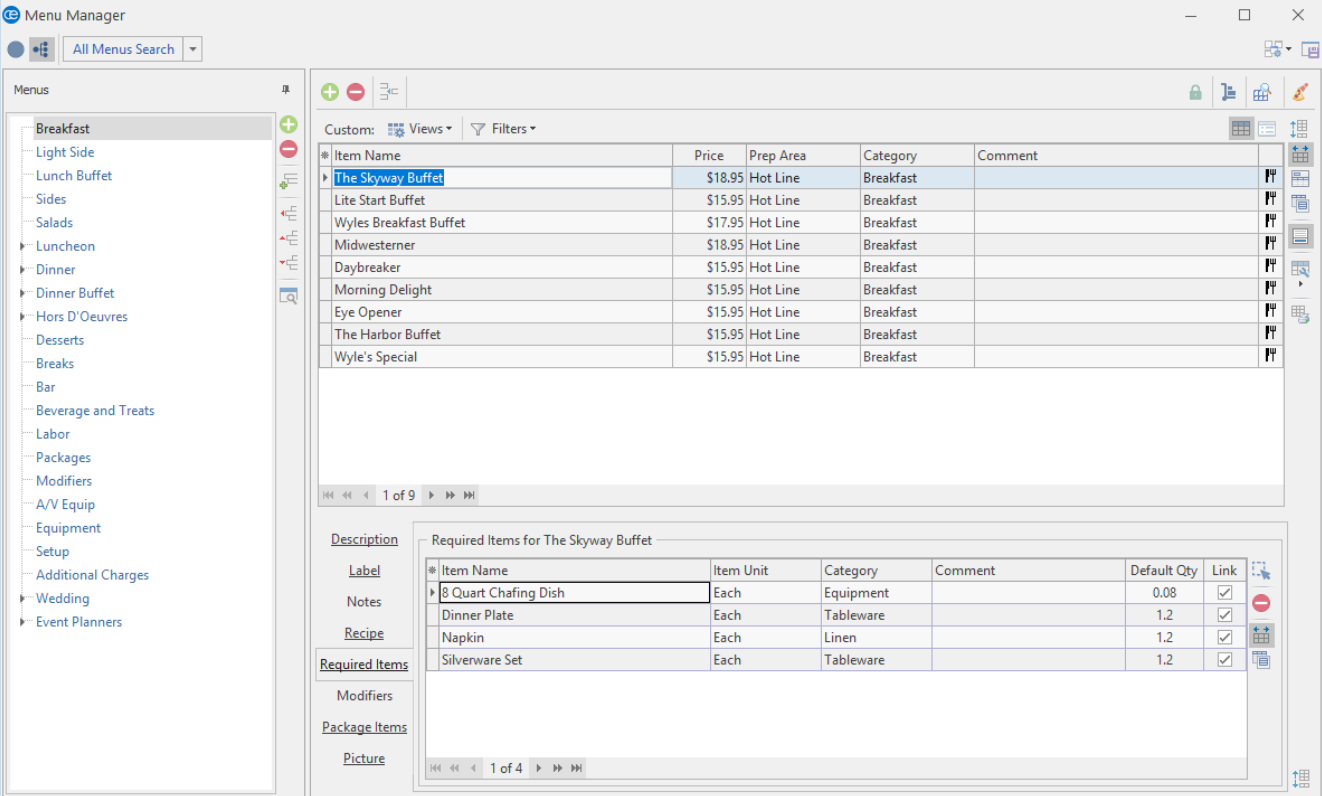
See [http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Required Items Lists.htm](http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building_Required_Items_Lists.htm)

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  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  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.




The screenshot shows the Menu Manager application window. On the left is a sidebar with a tree view of menu categories: Breakfast, Light Side, Lunch Buffet, Sides, Salads, Luncheon, Dinner, Dinner Buffet, Hors D'Oeuvres, Desserts, Breaks, Bar, Beverage and Treats, Labor, Packages, Modifiers, A/V Equip, Equipment, Setup, Additional Charges, Wedding, and Event Planners. The main area is divided into two panes. The top pane, titled 'Custom: Views Filters', displays a table of menu items. The bottom pane, titled 'Required Items for The Skyway Buffet', displays a table of required items for the selected menu item.

* 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	

* Item Name	Item Unit	Category	Comment	Default Qty	Link
8 Quart Chafing Dish	Each	Equipment		0.08	<input checked="" type="checkbox"/>
Dinner Plate	Each	Tableware		1.2	<input checked="" type="checkbox"/>
Napkin	Each	Linen		1.2	<input checked="" type="checkbox"/>
Silverware Set	Each	Tableware		1.2	<input checked="" type="checkbox"/>

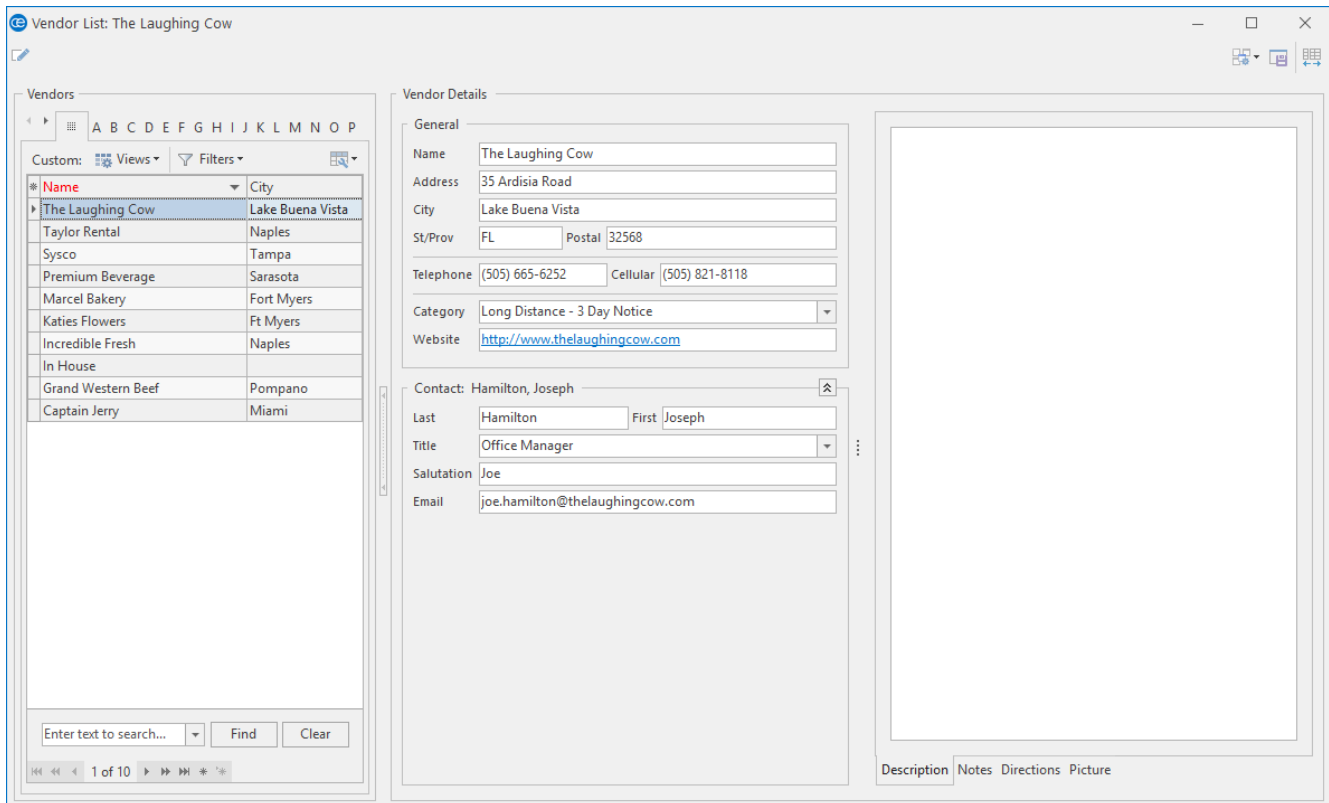
See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building_Required_Items_Lists.htm

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 Description, Notes, Directions, or Picture.



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



Vendor List: The Laughing Cow

Vendors

Custom: Views Filters

Name	City
The Laughing Cow	Lake Buena Vista
Taylor Rental	Naples
Sysco	Tampa
Premium Beverage	Sarasota
Marcel Bakery	Fort Myers
Katies Flowers	Ft Myers
Incredible Fresh	Naples
In House	
Grand Western Beef	Pompano
Captain Jerry	Miami

Enter text to search... Find Clear

1 of 10

Vendor Details

General

Name: The Laughing Cow

Address: 35 Ardisia Road

City: Lake Buena Vista

St/Prov: FL Postal: 32568

Telephone: (505) 665-6252 Cellular: (505) 821-8118

Category: Long Distance - 3 Day Notice

Website: <http://www.thelaughingcow.com>

Contact: Hamilton, Joseph

Last: Hamilton First: Joseph

Title: Office Manager

Salutation: Joe

Email: joe.hamilton@thelaughingcow.com

Description Notes Directions Picture


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 Vendor 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.

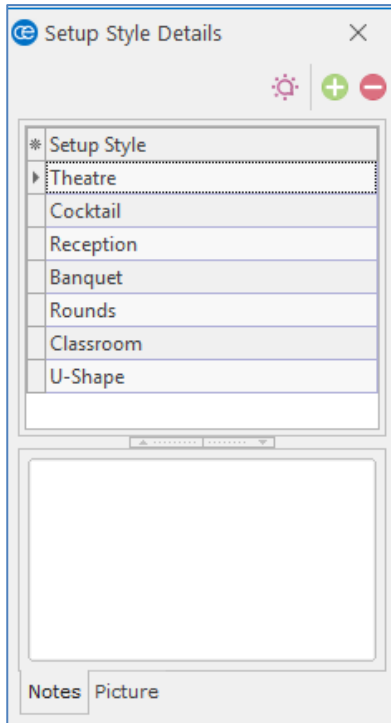
Room/Venue Customization

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**.




If you own the Banquet Rooms module in Caterease, your program will warn you if you have any conflicts with your banquet space, including double-booking, guest capacity conflicts, and unrecognized setup styles.




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>

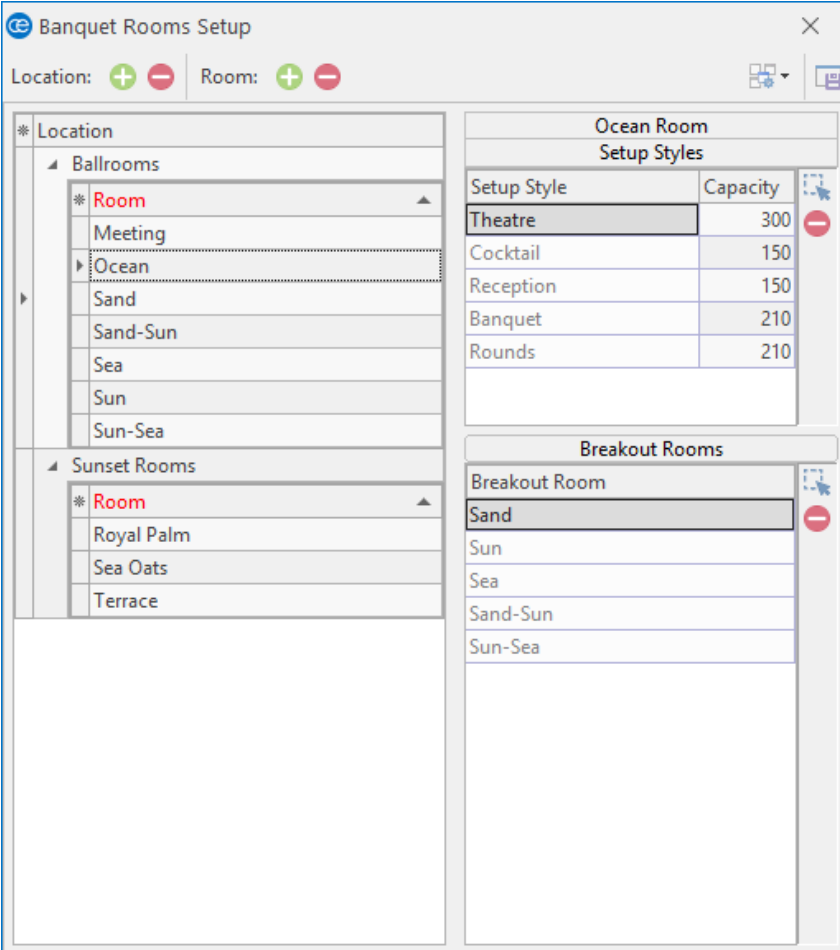
Add Banquet Rooms to Your Locations

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.catarease.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.





Setup Style	Capacity
Theatre	300
Cocktail	150
Reception	150
Banquet	210
Rounds	210

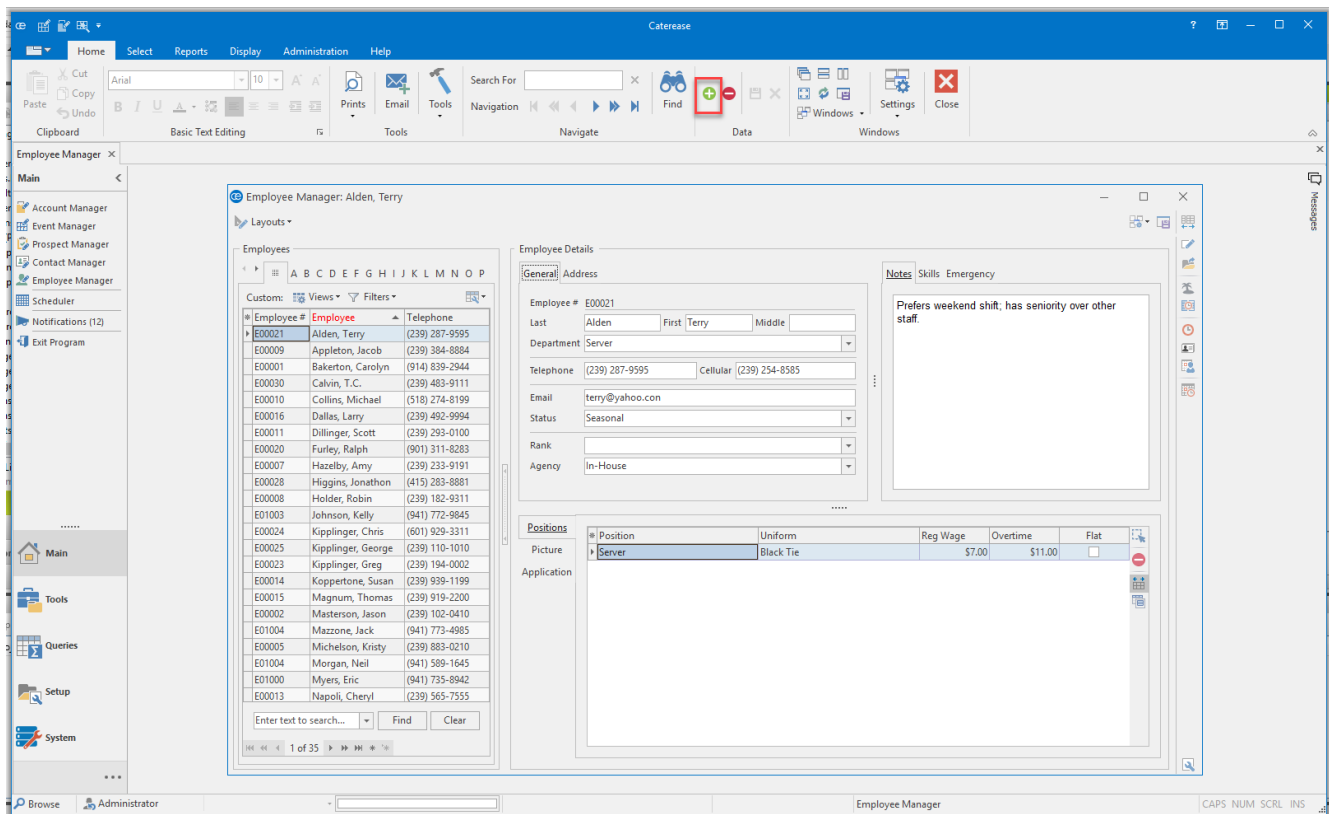
Breakout Room
Sand
Sun
Sea
Sand-Sun
Sun-Sea

See <http://support.catarease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm>

Staff/Position Setup/Customization


Add Employees

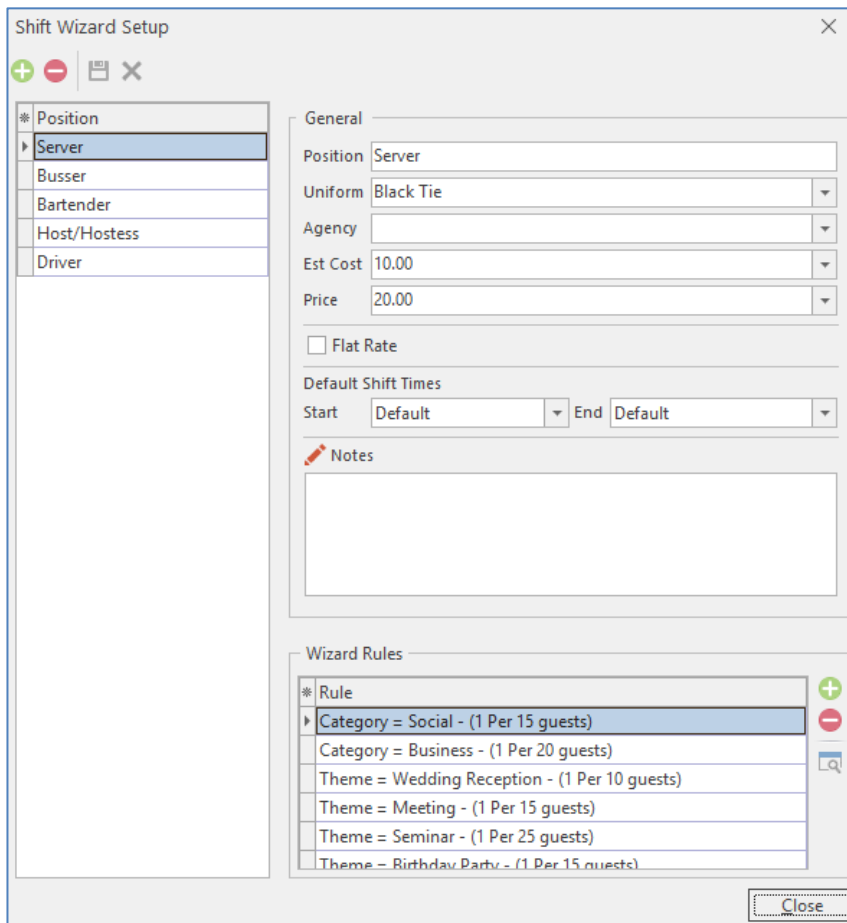
1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type the employee's last name into the Last field, and press **[Tab]** or **[Enter]**.
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 **Address** tab and complete the Home Address and Mailing Address fields.
8. When finished, click the **Save Changes** button , located in the **Home** ribbon tab.



See http://support.caterase.com/16/helpmenu/Setup/Employee_Manager/Creating_a_Default_List_of_Employees.htm

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.



Shift Wizard Setup

Position

- Server
- Busser
- Bartender
- Host/Hostess
- Driver

General

Position: Server

Uniform: Black Tie

Agency:

Est Cost: 10.00

Price: 20.00

☐ Flat Rate

Default Shift Times

Start: Default End: Default

Notes




Wizard Rules

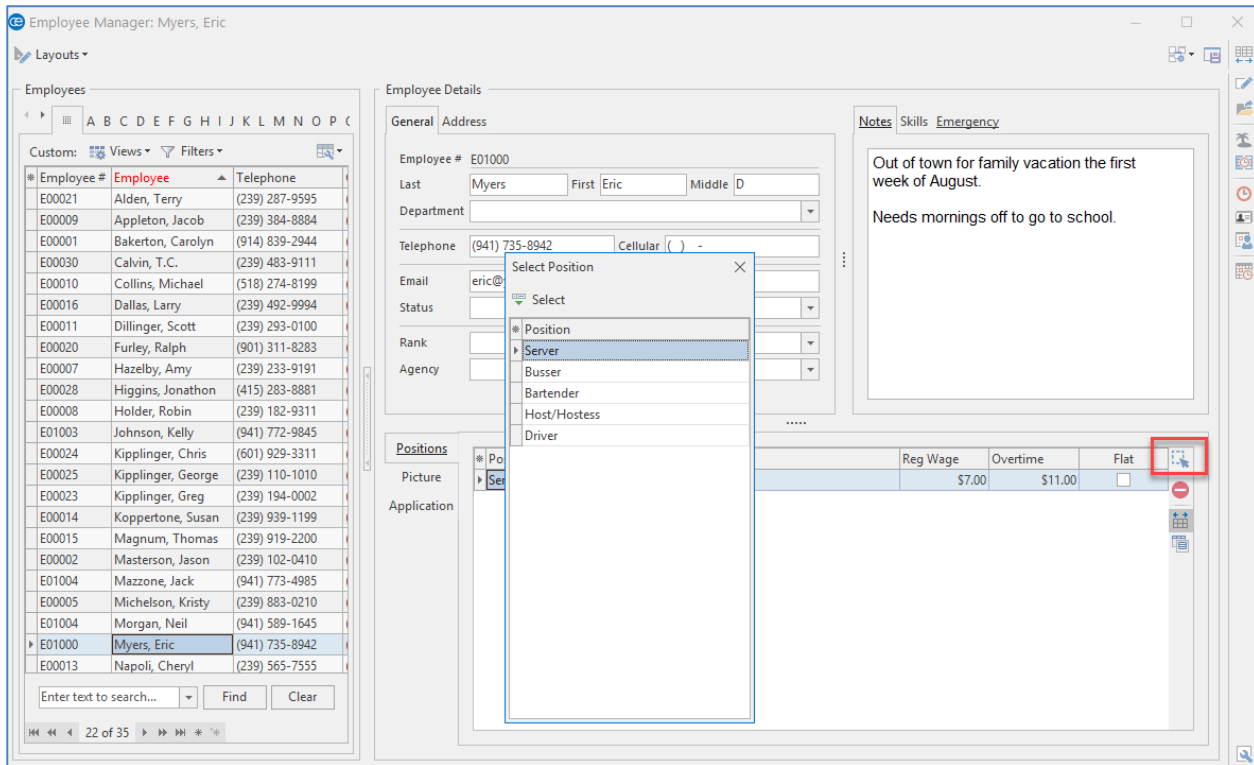
- Rule
- Category = Social - (1 Per 15 guests)
- Category = Business - (1 Per 20 guests)
- Theme = Wedding Reception - (1 Per 10 guests)
- Theme = Meeting - (1 Per 15 guests)
- Theme = Seminar - (1 Per 25 guests)
- Theme = Birthday Party - (1 Per 15 guests)

Close

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 , located on the right-hand side of the screen.
5. Highlight one or more positions and then click the **Select** button.
6. Click the , 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 , located in the **Home** ribbon tab.



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

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**.



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.

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