



## Enter Menu Details

1. If the information prompt is no longer visible, click the **Select Menus** button , located on the right-hand side of the Sub-Event display.
2. On the menu selection window, click a menu title and select, from the right-hand side of the screen, the items you would like to add.
3. Add a custom menu item to an event by clicking the **Add A New Food/Service Item** button , located on the right-hand side of the **Food/Service** tab.
4. Enter the name, price, and quantity of the menu item. (Ensure the item type, located on the far right-hand side of the window, is correct).

(See [Event Wizard Step 3](#))

## Generate the Contract (or Other Print)

1. From the *open* event in Event Manager, click the down arrow on the bottom portion of the **Prints** button, located at the top of the screen.
2. Click **Event Contracts and Invoices** and choose **Contract** (or other desired print).
3. From the Print Preview screen, click the **Print** button, located on the upper left-hand side of the screen.

## E-mail the Contract (or Other Print)

1. From the Print Preview screen, click the **Email** button, located at the top of the screen.  
**Note:** *The print will be attached as a PDF.*
2. Type a subject into the Subject field or select an option from the quickpick list at the right of the field.
3. Type the e-mail body or select a custom merge letter by clicking the **Merge Doc** button (available with the Document Builder add-in).
4. Attach additional prints/files as desired.
5. Click the **Send** button.

(See [Emailing an Event Print](#))

### Additional Resources

[Managing Staff for an Event](#)

[Copying Events](#)

[Copying Sub-Events](#)

[Printing Event Prints](#)



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Quick Reference Guide:


# Booking Your First Event

800.863.1616  
[www.caterease.com](http://www.caterease.com)

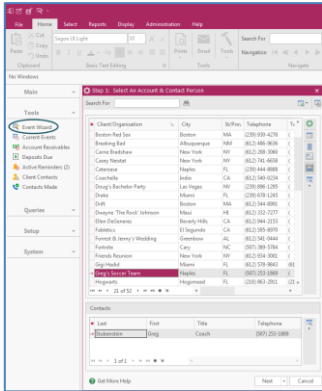


## Access the Event Wizard





1. Click the **Event Wizard** button , located in the Quick Access Toolbar at the top left-hand side of your screen or from the **Tools** sidebar.

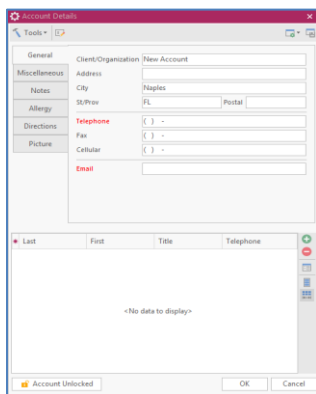
**Note:** The Event Wizard can be accessed from many areas within Caterease.



## Add a New Account/Contact Person (Step 1)

1. Click the **Add New Account** button , located at the top of the Event Wizard (Step 1) window.
2. Click **Yes** at the confirmation prompt.
3. Fill in the Client/Company details by typing directly into the fields provided (see image below).
4. When finished, click **OK**.

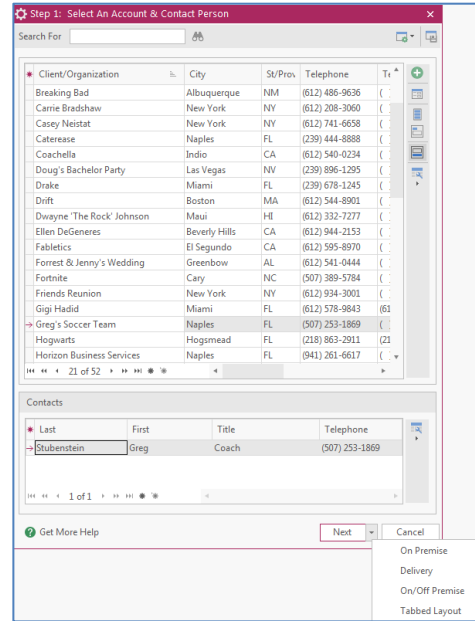
**Note:** If you are adding information for an individual, click the **Add a New Contact** button , and then click **Copy to Client** on the subsequent screen after you fill out the contact information.



(See [Event Wizard Step 1](#))

## Choose a Wizard Layout

1. From Step 1 of the Event Wizard, click the **Next** button or choose from a custom Event Wizard by clicking the down arrow to the right of the **Next** button.




## Customize a Wizard Layout

1. Right-click anywhere on the areas of the Event Wizard Step 2 screen that do **not** allow data entry, then choose **Customize**.
2. To add a field to your screen, hold your left mouse button on any field in the **Available Items** pane and drag it into the desired location on your screen. To remove a field from the screen, click on a field (ensuring the Customize window is open) and drag it into the **Available Items** pane.
3. To remove an entire tab from the screen, right-click on a tab and choose **Customize**. Click on the tab heading (for example, click on the words "Venue Information" within the **Venue** tab). The entire section will become highlighted, enabling you to drag it into the **Available Items** pane.
4. Continue adding or removing fields or tabs as desired.

**Important Note:** Click the **Save Current Window Settings** button





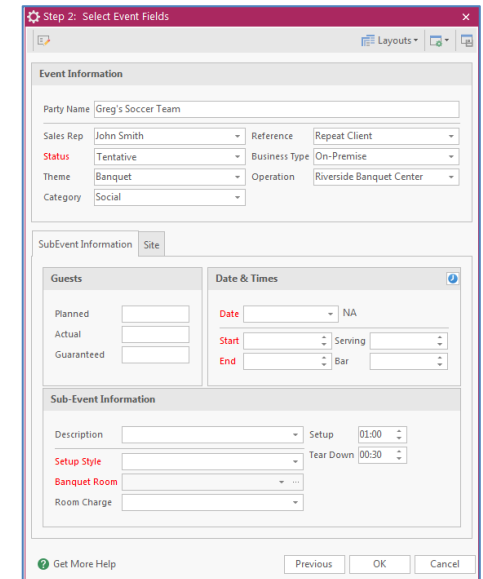
, located at the top right-hand side of the window, if you want the modified layout to serve as the default for yourself or for other users on your Caterease network.

(See [Creating Custom Event Wizards](#))

## Complete the Informational Fields (Step 2)

**Note:** The entire screen can be customized to suit your preferences.

1. Enter details into simple text fields, such as the **Party Name** field, by simply typing into the field.
2. Click the down arrow to the right of various fields to access a list of quickpicks.
3. Enter a date by typing into the **Date** field or by accessing the drop-down calendar.
4. Enter times for the new event by typing directly into the fields or by clicking the **Time Wizard** button  and dragging and dropping times into position.
5. **[Optional—If Tabbed View is Selected]** For on-premise parties, click the **Venue** tab and select a Setup Style and Banquet Room.
6. **[Optional—If Tabbed View is Selected]** For off-premise parties, click the **Site** tab and enter the site information, including Name, Address, etc., or click the **Select Site Location** button  to select from a list of frequently used locations.
7. Enter text into text blocks (Notes, Directions, Setup Notes, etc.), by typing directly into the fields.
8. When finished, click **OK**.
9. Click **Yes** at the prompt to move to the menu-selection process.



(See [Event Wizard Step 2](#))