Quick Reference Guide:

Program Setup

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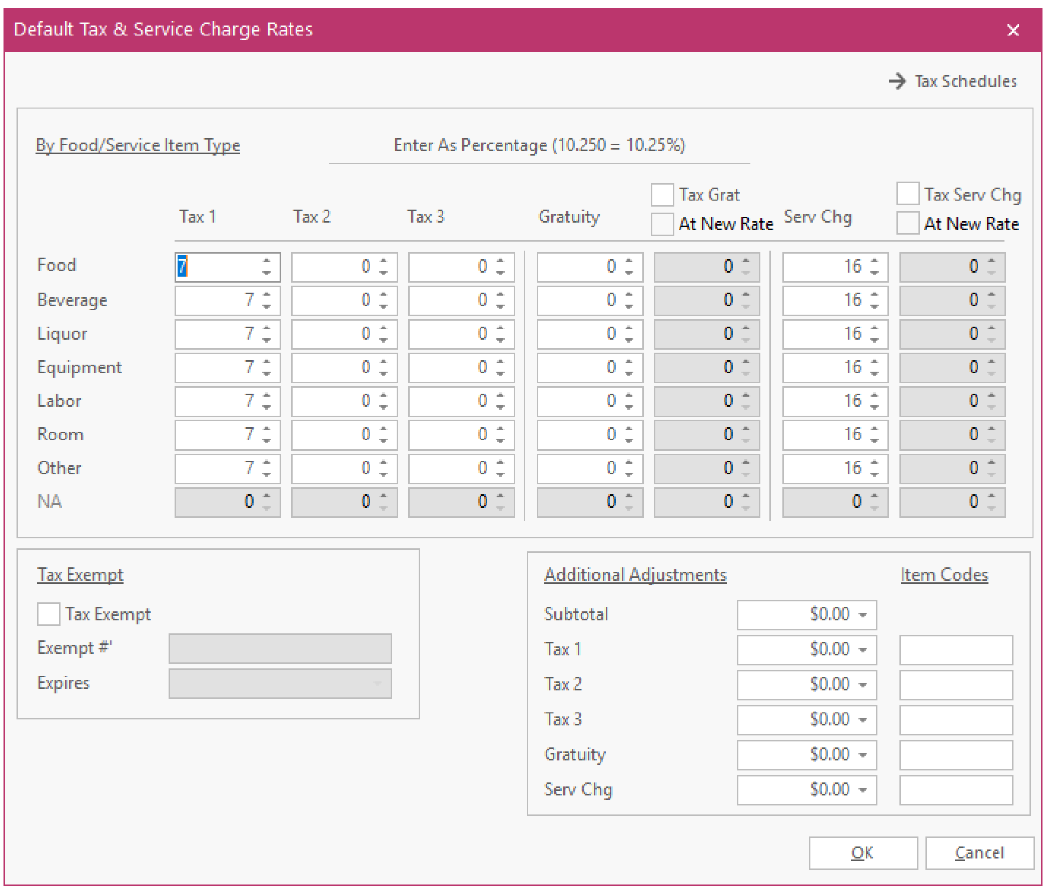
General Setup/Customization

Set Up Default Tax, Service Charge, and Gratuity

> 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.

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, located on the upper right-hand side of the window, 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**.

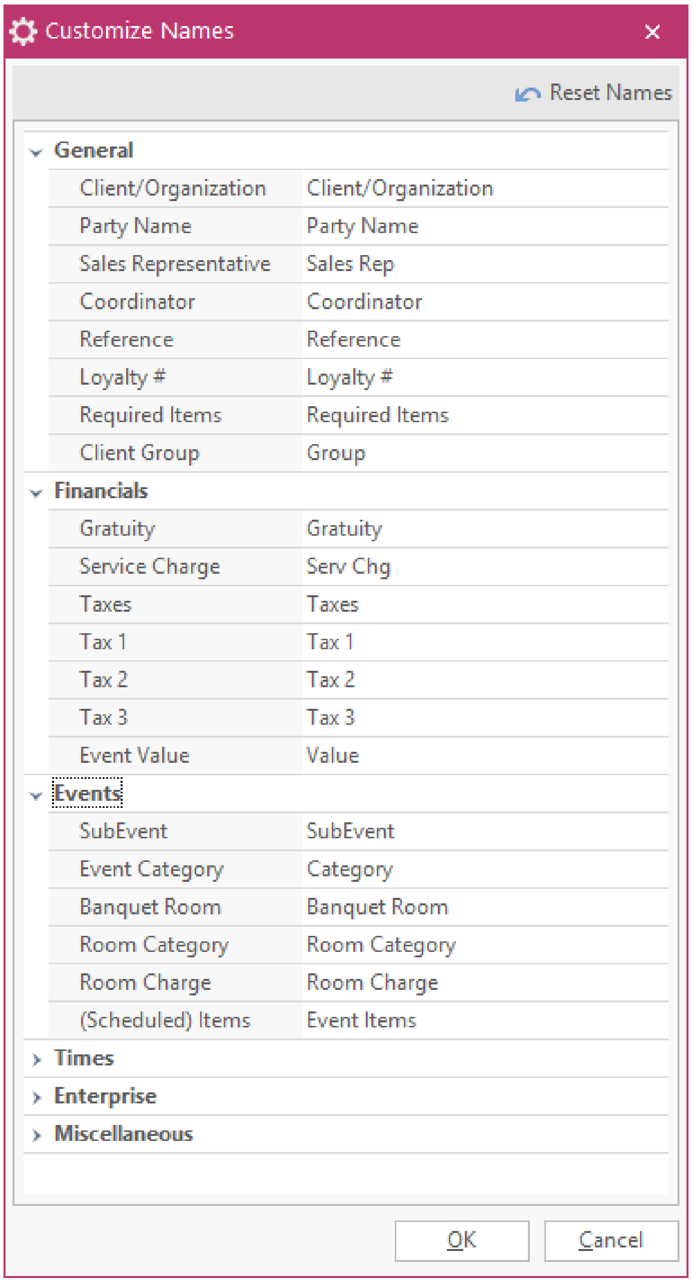


(See http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_Default_Tax_Rates.htm)

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.)*

> tip 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 Items” to Scheduled Vans or Scheduled Tables, for example. You can also use this area to rename event time and guest fields.

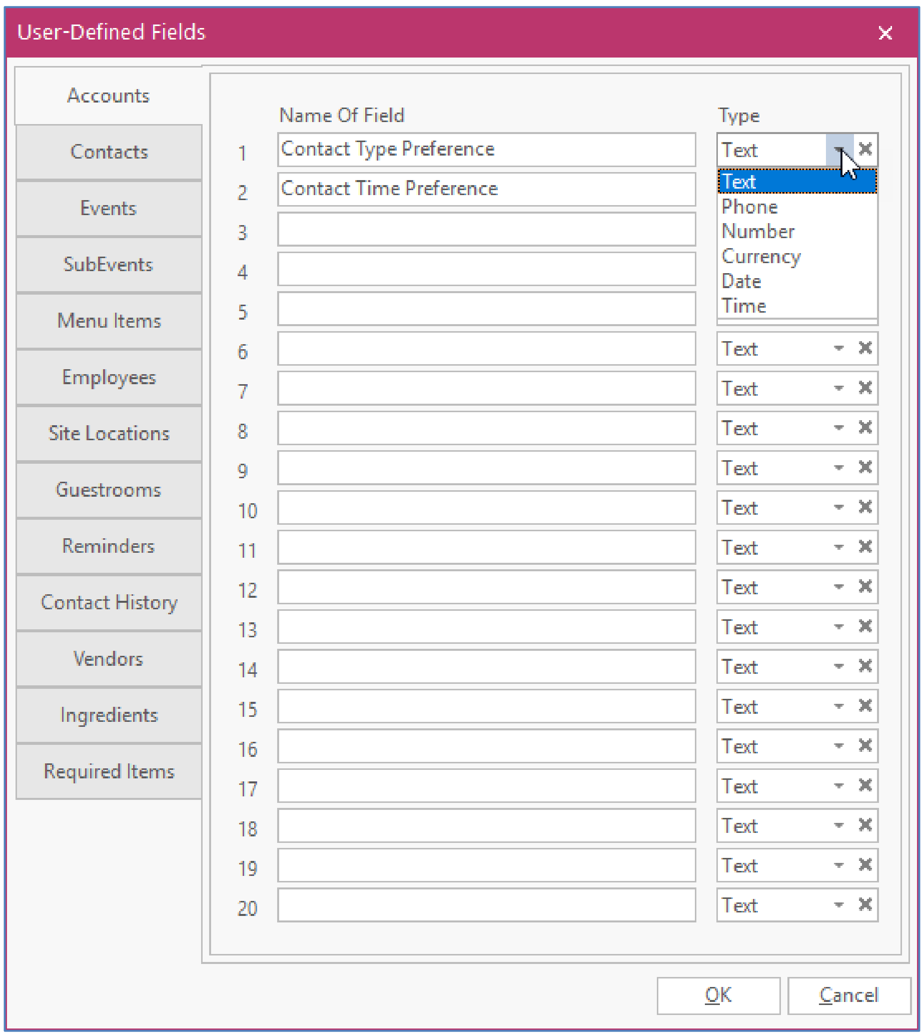


(See http://support.caterease.com/20/helpmenu/Content/Setup/Renaming_Fields.htm and http://support.caterease.com/20/helpmenu/Content/Setup/Renaming%20the%20Time%20Fields.htm)

Create User-Defined Fields

> tip 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.

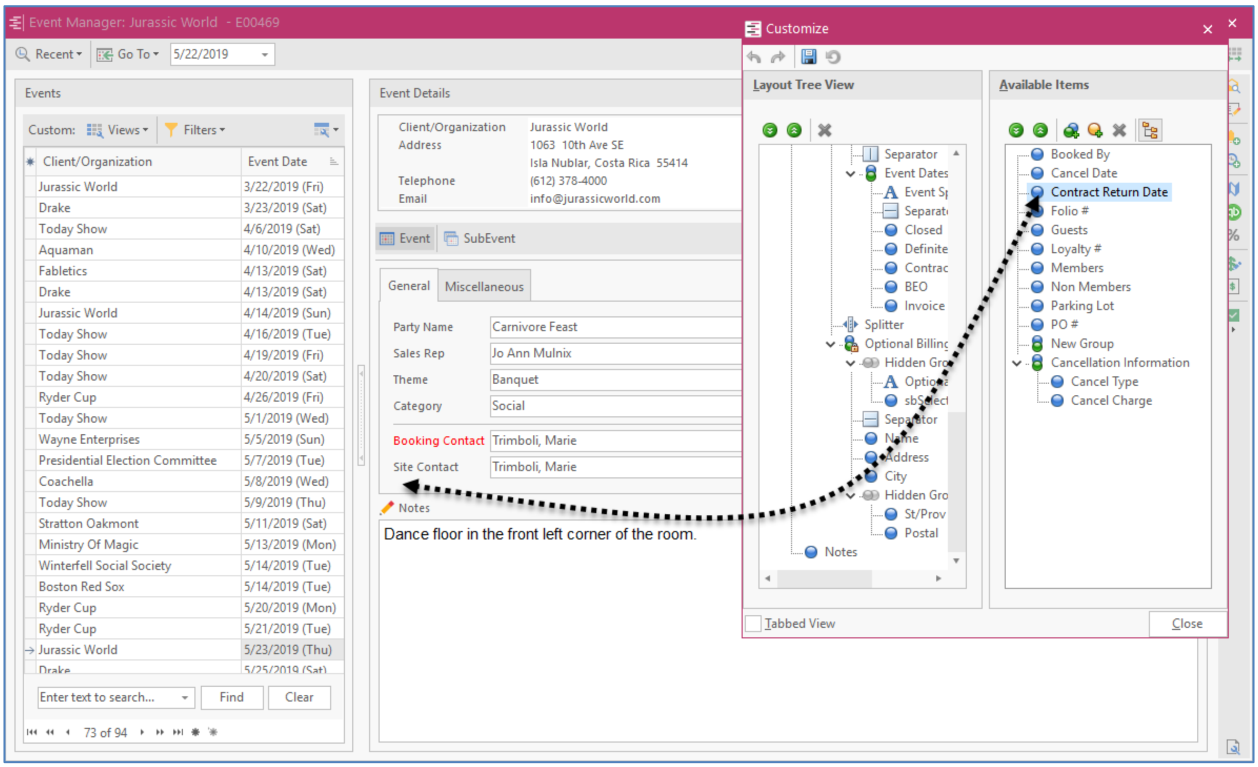
1. Click the **Setup** sidebar.
2. Click the **User Defined Fields** button.
3. Click the appropriate tab for the type of field you are creating. For example, click the **Events** tab for your Event Manager, **Accounts** tab for your Account Manager, etc.
4. Click into the first available user-defined 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 using required fields.)*
6. When finished, click **OK**.



(See http://support.caterease.com/20/helpmenu/Content/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 click **Close** to close the Customize window.
6. Click the **Save Current Window Settings** button  to retain the settings for yourself or for the other users in your Caterease network.

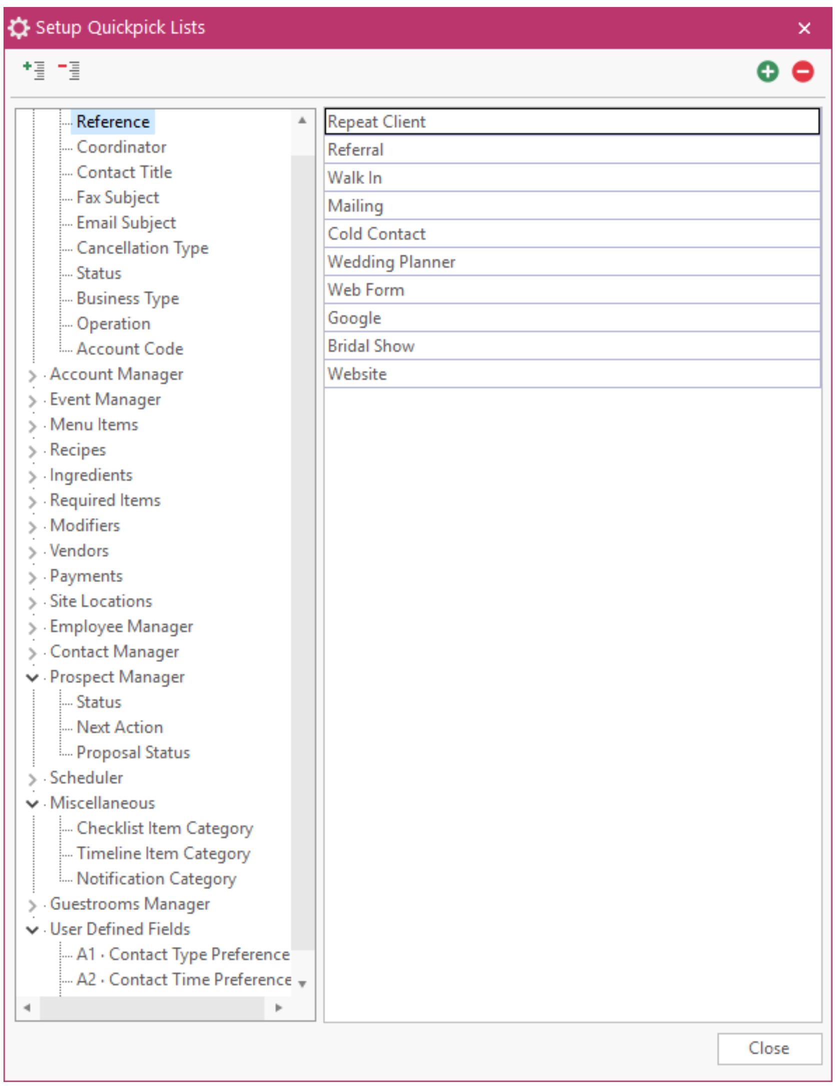


(See http://support.caterease.com/20/helpmenu/Content/Setup/Creating_User_Defined_Fields.htm)

Set up/Customize Quickpick Lists

tip 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 even add quickpicks to User-Defined fields.*

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**.

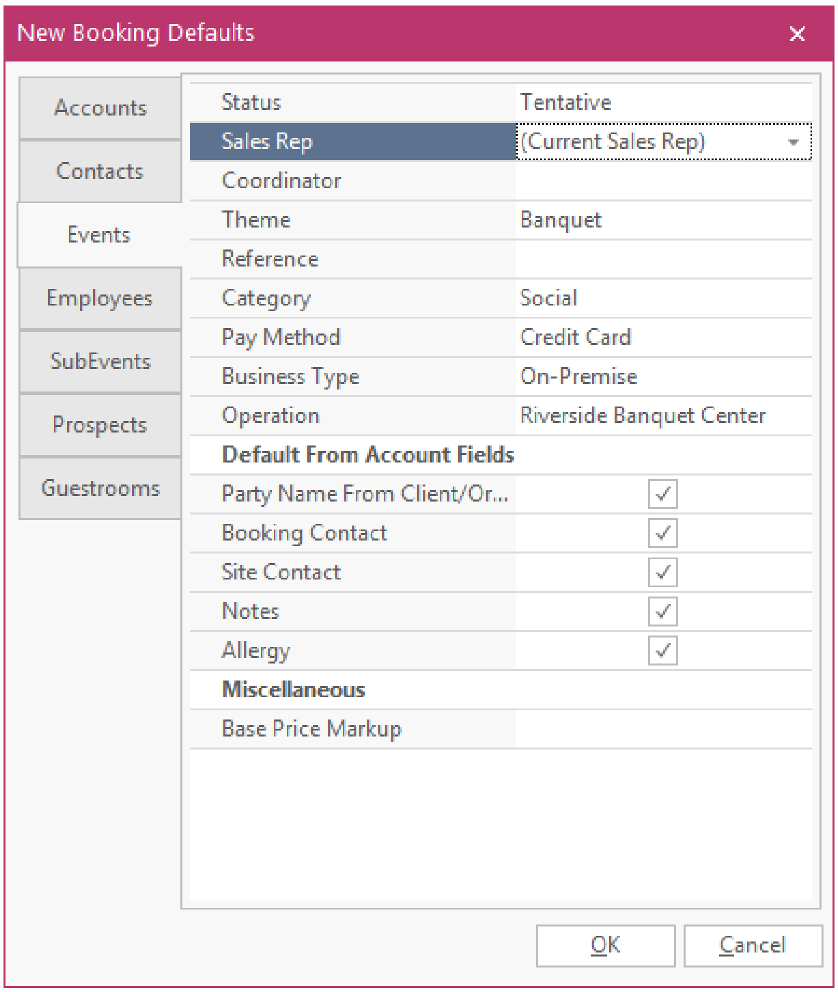


(See http://support.caterease.com/20/helpmenu/Content/Setup/Customizing_Quickpick_Lists.htm)

Establish New Booking Defaults

> 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.

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**.

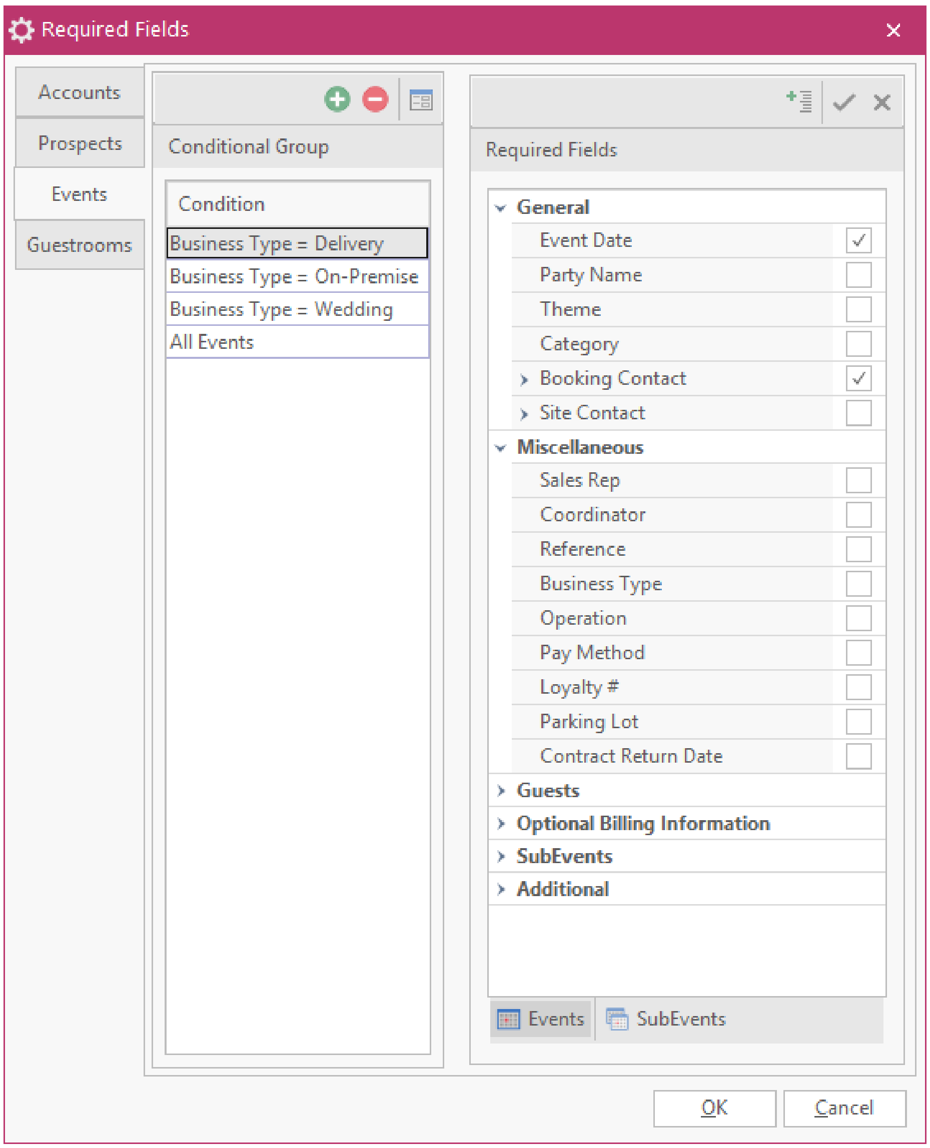


(See [http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_New_Booking_Defaults.htm)](http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_New_Booking_Defaults.htm)

Establish Required Fields

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.

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.**



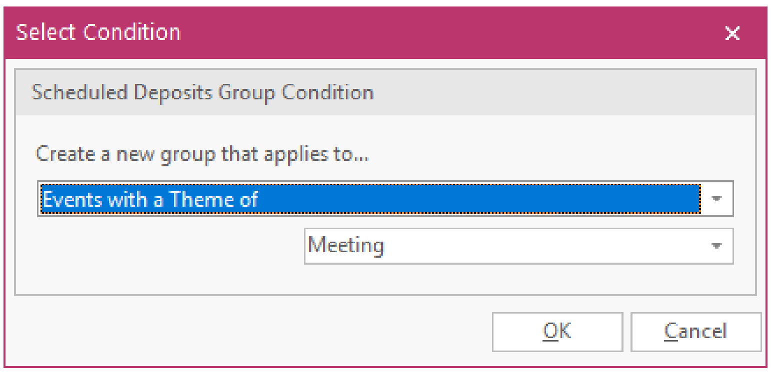
(See [http://support.caterease.com/20/helpmenu/Content/Setup/Making_Fields_Required.htm)](http://support.caterease.com/20/helpmenu/Content/Setup/Making_Fields_Required.htm)

Establish Conditional Deposit Schedules

tip You can create automatic schedules of future deposits for your parties, complete with due amounts (in dollars or percentages of event totals) and due dates (relative to the event date or booked date), and then use these schedules for the various events that you book. Schedules can be conditional, so it applies only to a certain type of event. What's more, you can even tell the program to automatically update the due amounts or due dates if details of the party change.

1. Click the **Administration** ribbon tab.
2. Click the **Options** button and choose **Deposit Schedule**. *(Not available in Express.)*
3. Click the **Add Group** button , located at the top left-hand side of the **Conditional Group** pane.
4. Select a condition from the **Create a new group that applies to**... drop-down list. Choose from the following:

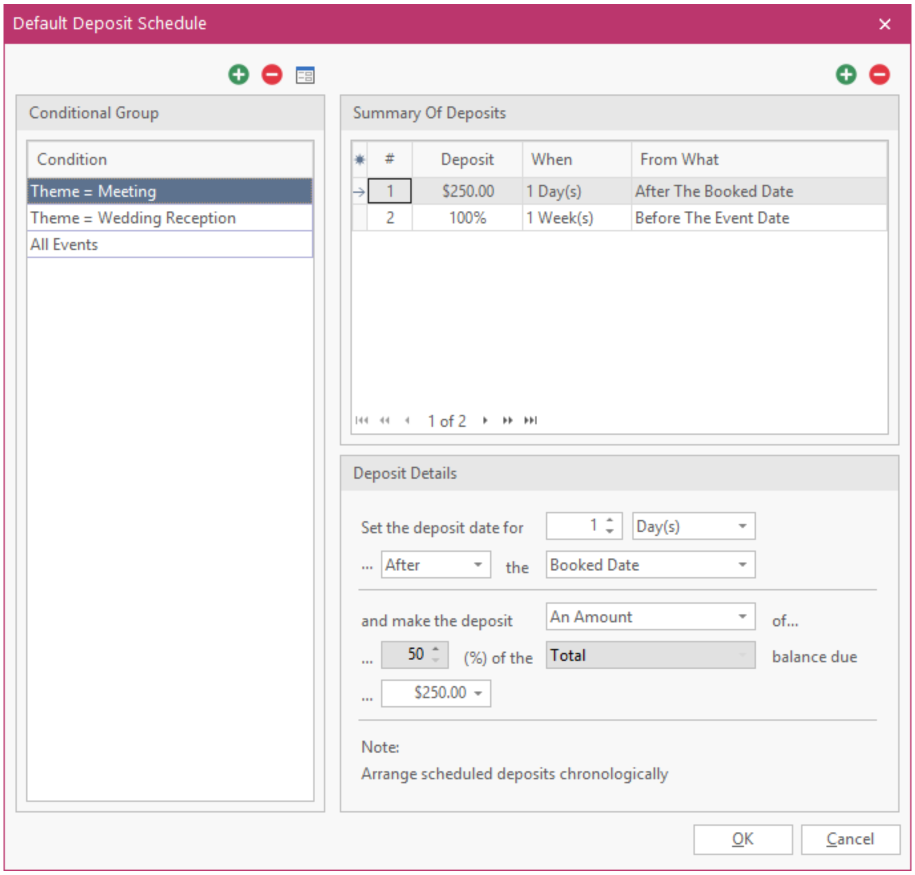
    - **All Events** (Note: If All Events is selected, the second drop-down list will not display.)
    - **Events with a Status of** (or Category of; Theme of; Operation of; Business Type of; Sales Representative of)



5. Click **OK**.
6. Click the **Add Scheduled Deposit** button , located on the right-hand side of the window.
7. In the **Deposit Details** area, choose whether this deposit will be due **Before** or **After** the **Event Date** or the date on which the event is booked (**Booked Date**), and how many days/week/months before/after the Event Date/Booked Date.
8. Determine whether the amount of the deposit should be calculated as a percentage of the event totals or as a whole-dollar amount by choosing either **A Percent** or **An Amount** from the drop-down list.

    - If setting a percentage of the event totals, use the fields in the fourth row of the **Deposit Details** area to set the percentage amount (first field) and the total to use as the basis.
      Note: *You would probably use the "Remaining balance due" option for all subsequent deposits after the first one. For example, a possible first deposit might be "50% of the Total balance due," but subsequent deposits might be based on the balance that remains. In other words, "Total balance due" represents the total amount of sales for that event, regardless of whether any deposits have been received.*

9. If setting a whole-dollar amount, use the field in the fifth row of the **Deposit Details** area to set that dollar amount, either by typing into the field or by clicking the down arrow to access the drop-down calculator.



Important Note: *The program evaluates these conditions in the order they are listed, and it stops when it reaches a condition that is true. For example, if your first condition for events says "Category = Business" and your second condition says "Status = Definite," when the program finds an event with a category of "Business," it will apply those required fields and stop - never evaluating for the second condition. For this reason, it is imperative that any condition that says "All" records ("Events," "Accounts," etc.), must be the LAST condition listed.*

(See [http://support.caterease.com/20/helpmenu/Content/Setup/Creating_Default_Deposit_Schedules.htm)](http://support.caterease.com/20/helpmenu/Content/Setup/Creating_Default_Deposit_Schedules.htm)

Set up Automatic Change Notifications

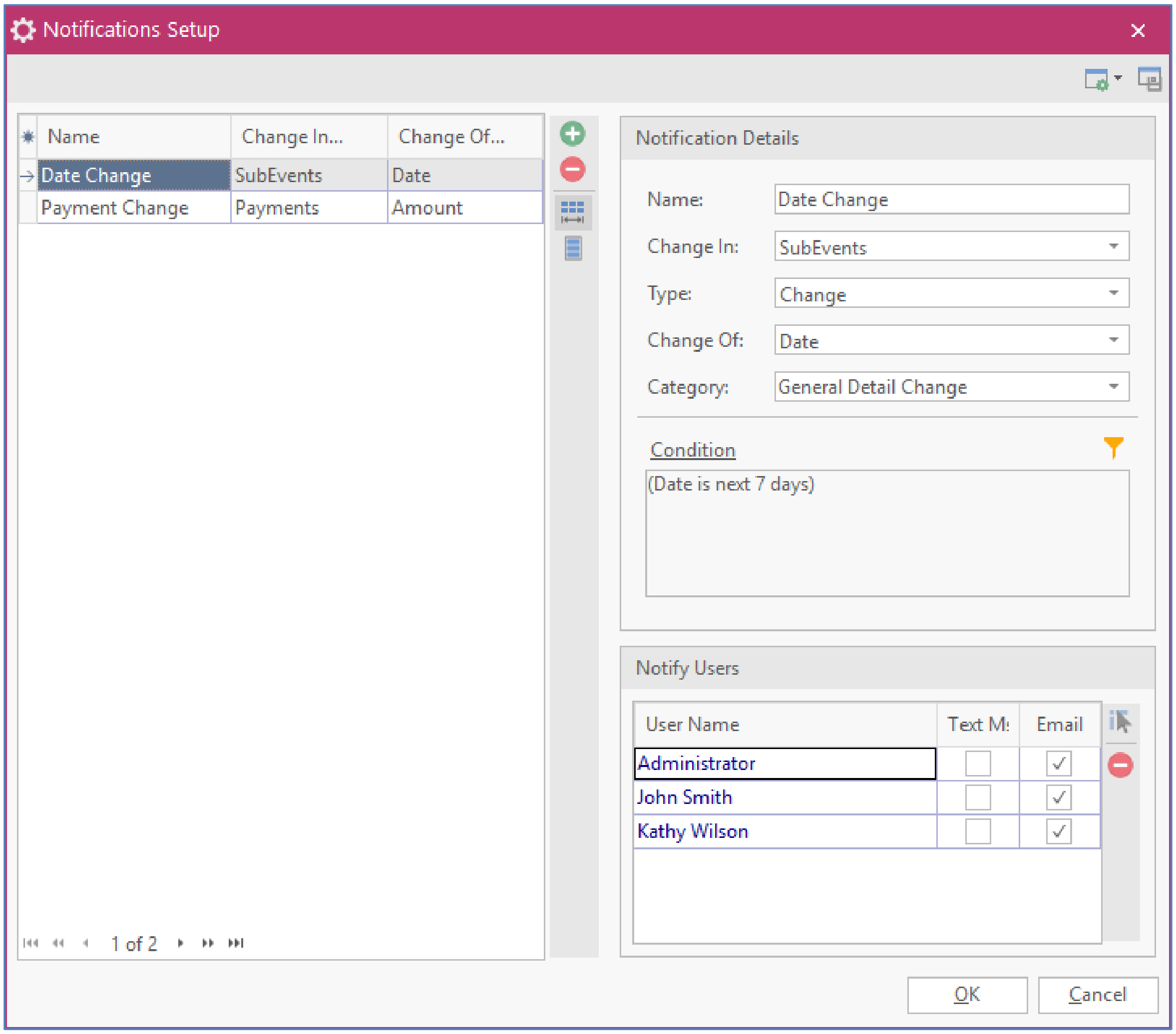
> tip It is extremely important for you and your team to be constantly updated. The incredible Caterease Automatic Notifications feature not only lets you tell the program what specific changes you or others want to be notified about, but it also allows you to have those notifications sent to you via e-mail or text.

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Notifications Setup**. *(Not available in Express.)*
3. Click the **Add Notification** button .
4. Fill out the information in the **Notification Details** area:

    - **Name**: Type a **Notification Name** into the Name field.
    - **Change In**: Choose from the list of options available in the drop-down list to the right of the Change In field: Events, Sub-Events, Food/Service Items, Shifts, Payments.
    - **Type**: Select **Change** or **New** from the **Type** drop-down list.
      ***Note**: "New" is available only if **Event** or **Payment** is selected in the Change In field.*
    - **Change Of**: Select an option from the **Change Of** drop-down list.
      ***Note**: Available options depend on what is selected in the Change In field.*
    - **Category**: Select an option from the drop-down quickpick list to the right of the Category field.

5. Optionally apply any desired filters by clicking the **Filter** button and customizing the conditions. (See the next section.)
6. Click the **Select User** button , in the **Notify Users** area at the bottom right-hand side of the window.
7. Double-click any User Name/Sales Rep who should receive this notification.
8. Click the , located at the upper right-hand side of the window, to close the window.
9. Click into the **Text Msg** and/or **Email** checkbox next to a User Name/Sales Rep to choose which users will be alerted via e-mail or text message when changes have been made or records have been added. *(See the link below for setup instructions.)*
10. Click **OK** to save your changes and exit.

(See the image on the following page.)

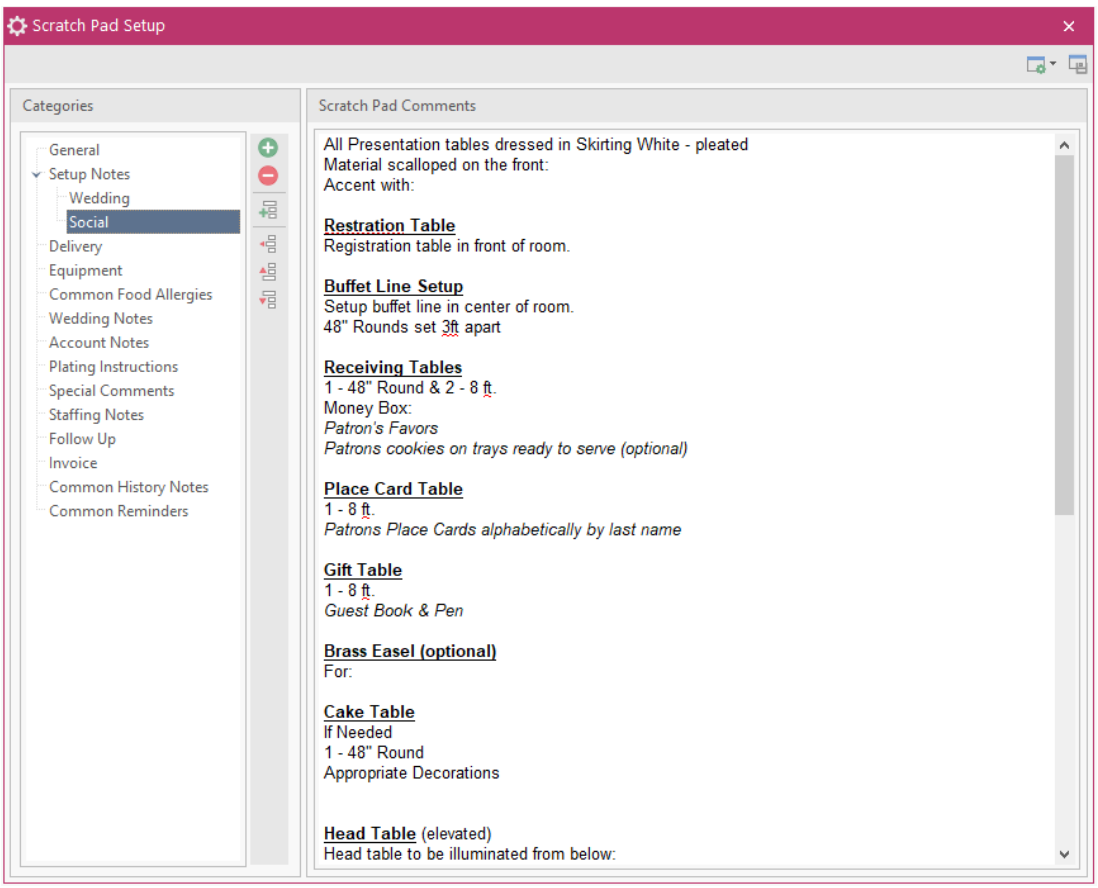


(See http://support.caterease.com/20/helpmenu/Content/General_Information/User%20Notifications%20Module.htm)

Set Up the Scratch Pad

> **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.

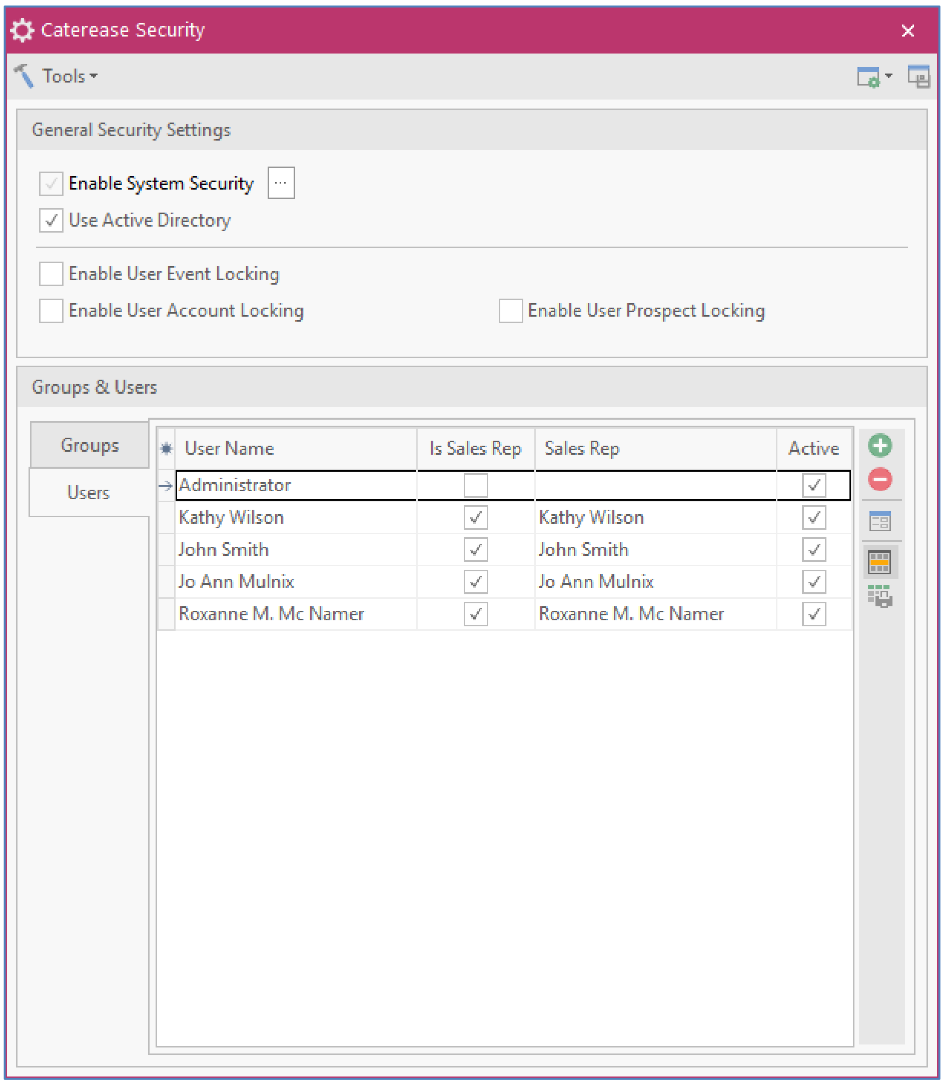
1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Scratch Pad.**
3. Click the **Add New Category** button, located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for the new category and press **[Enter].**
6. Click 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.



(See [http://support.caterease.com/20/helpmenu/Content/Setup/Setting_Up_the_Scratch_Pad.htm)](http://support.caterease.com/20/helpmenu/Content/Setup/Setting_Up_the_Scratch_Pad.htm)

Add Users

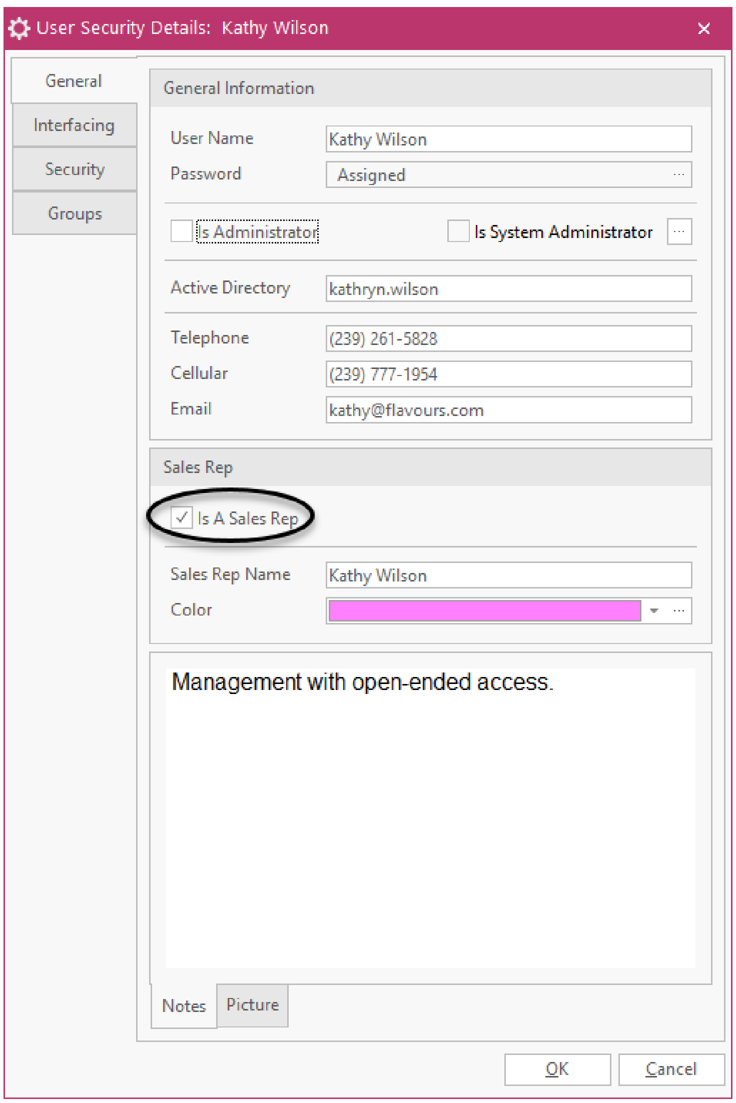
1. Click the **Administration** ribbon tab and choose **Security**.
2. Click the **Users** tab.
3. Click the **Add User** button , located on the right-hand side of the window.
4. Enter a <u>User Name</u> for the new user.
5. Click the ellipsis button to the right of the <u>Password</u> field to assign 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 <u>Active Directory Name</u> 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/20/helpmenu/Content/Setup/Security/Adding_a_New_User.htm)](http://support.caterease.com/20/helpmenu/Content/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.
13. When finished, click **OK**.

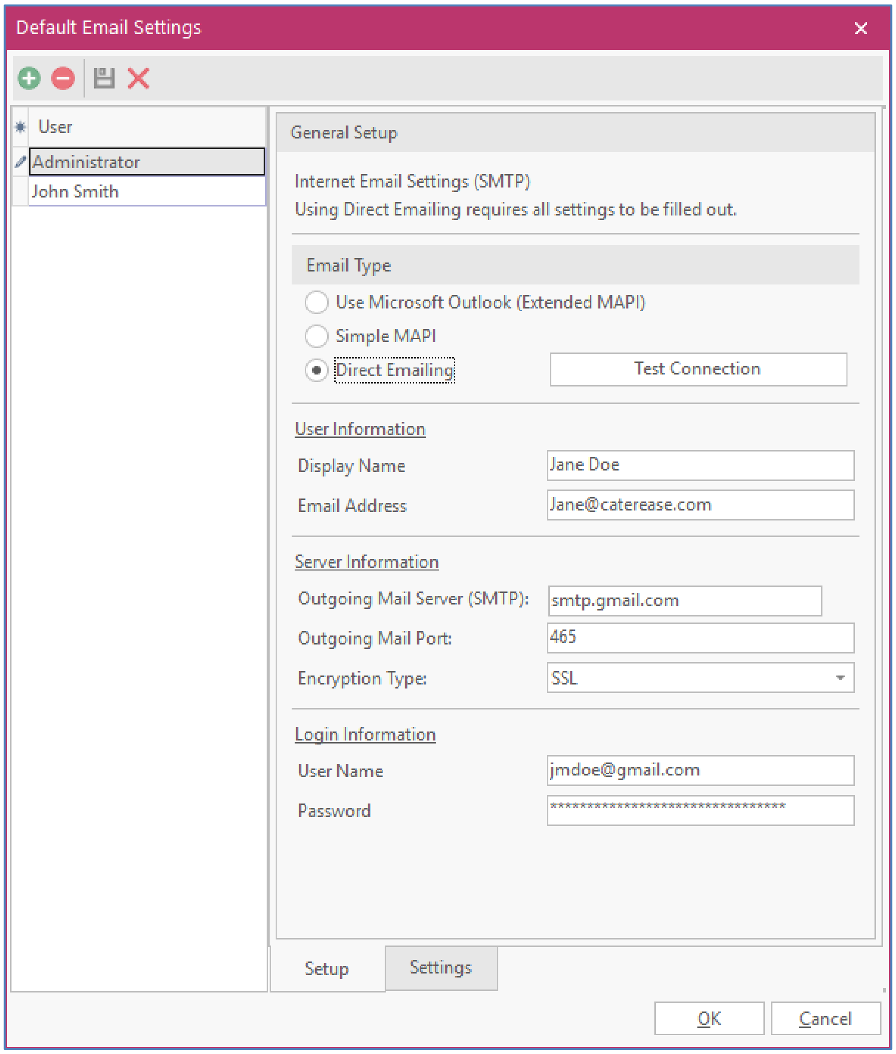


(See http://support.caterease.com/20/helpmenu/Content/Setup/Security/Adding_a_New_User.htm)

Configure E-mail Settings

tip 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.

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.

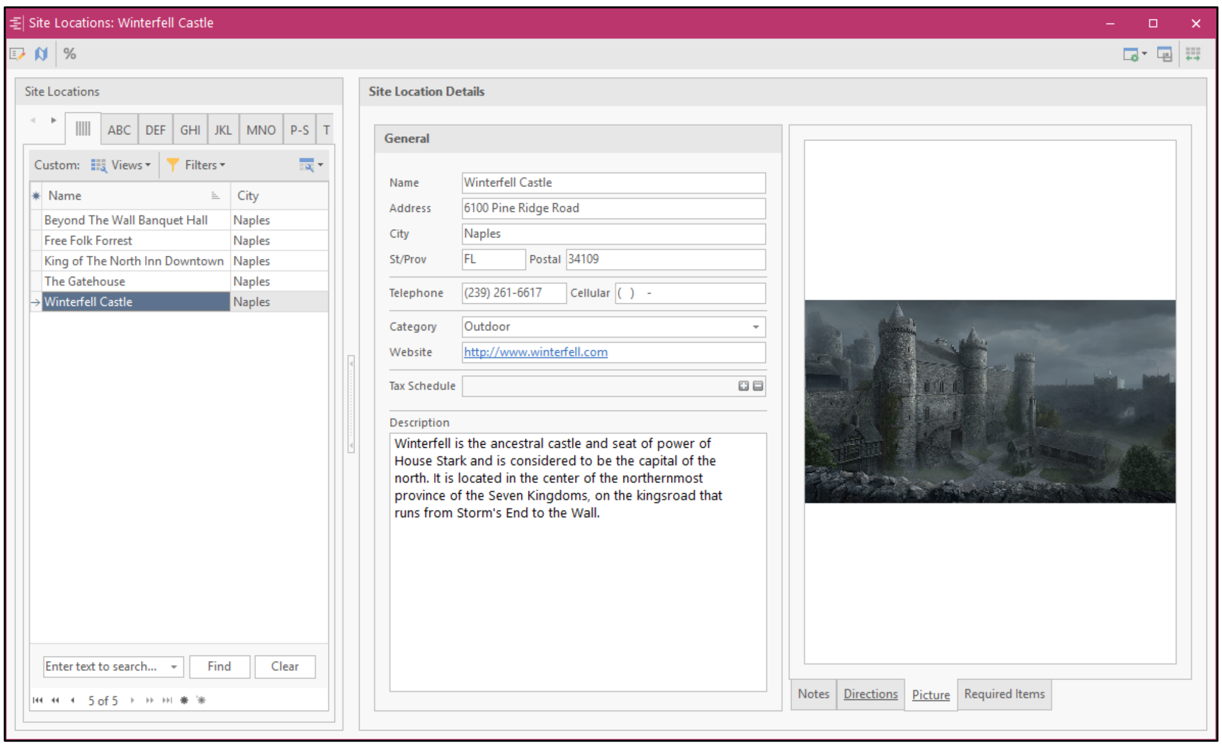


(See [http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_Email_Settings.htm)](http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_Email_Settings.htm)

Add Default Site Locations

tip 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.

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.*

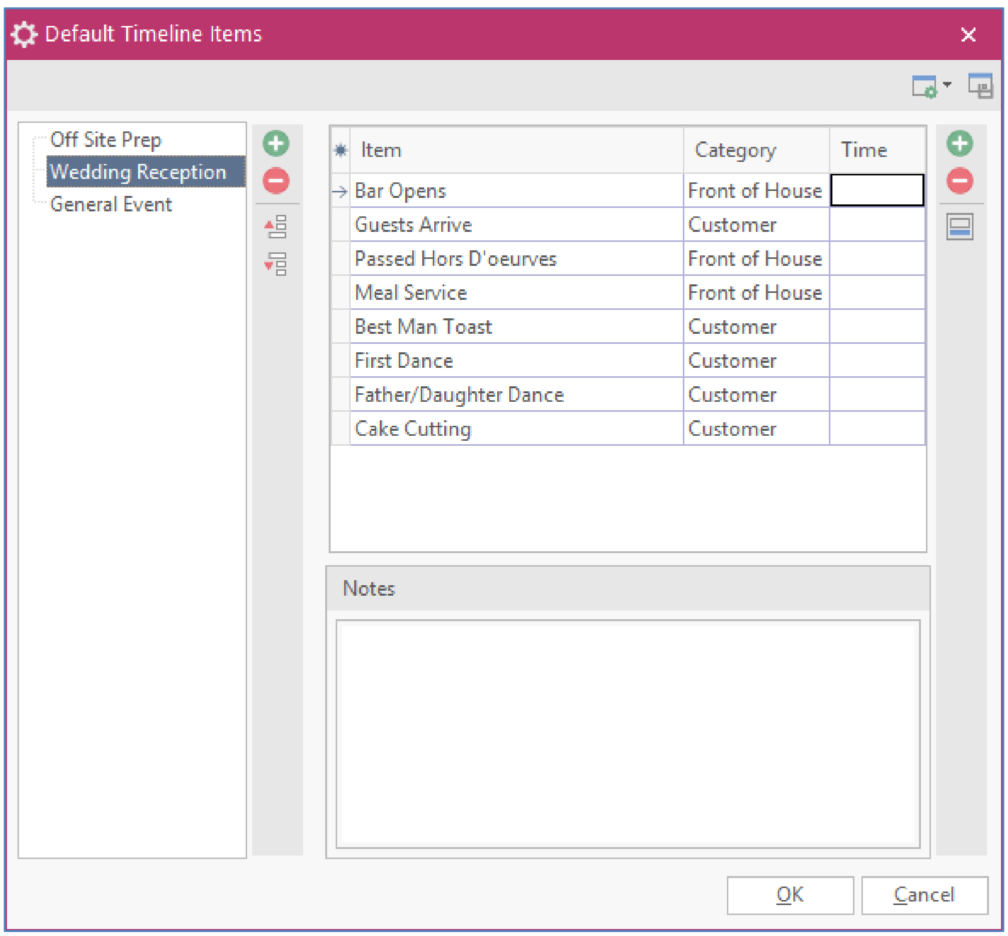


(See http://support.caterease.com/20/helpmenu/Content/Setup/Entering_Site_Locations_into_the_Site_Locations_Database.htm)

Set Up Default Timelines

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).

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**.

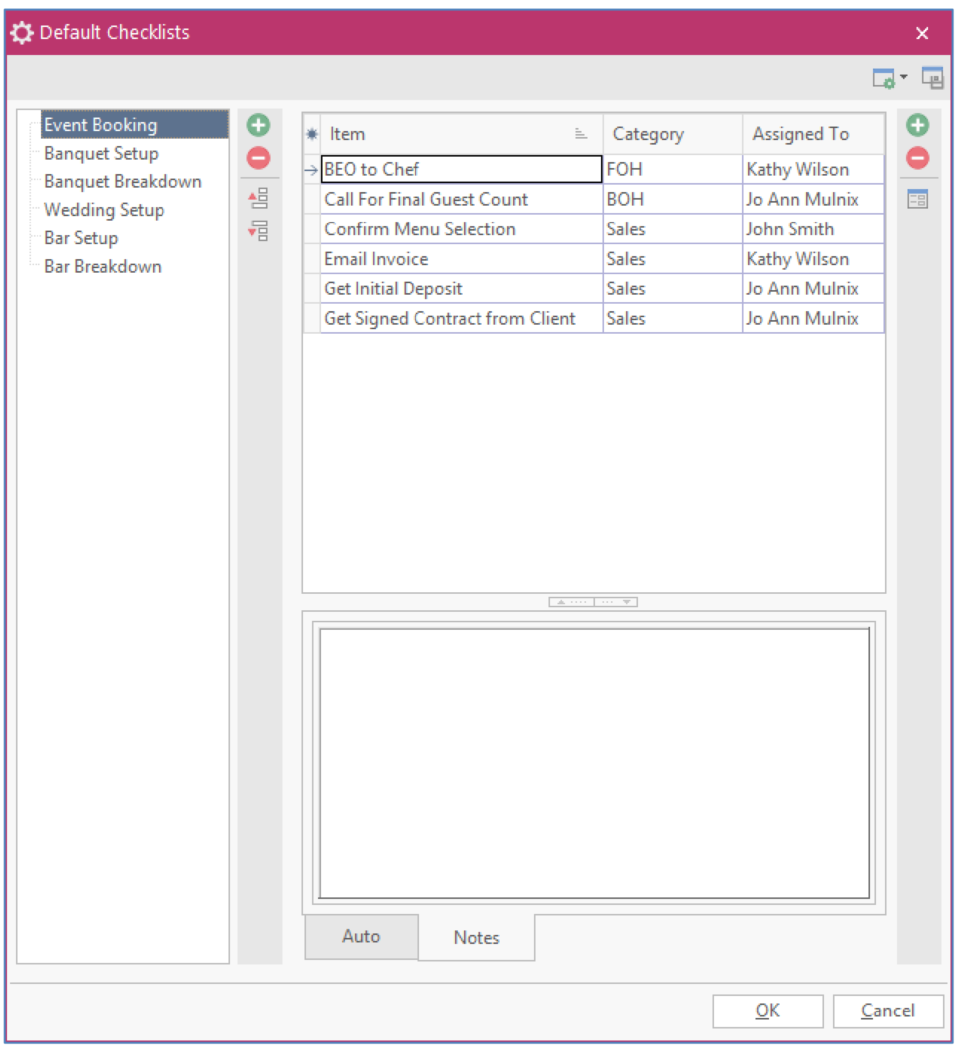


(See http://support.caterease.com/20/helpmenu/Content/Event_Manager/Creating_a_Detailed_Event_Timeline.htm)

Set Up Default Checklists

> **tip** 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**.

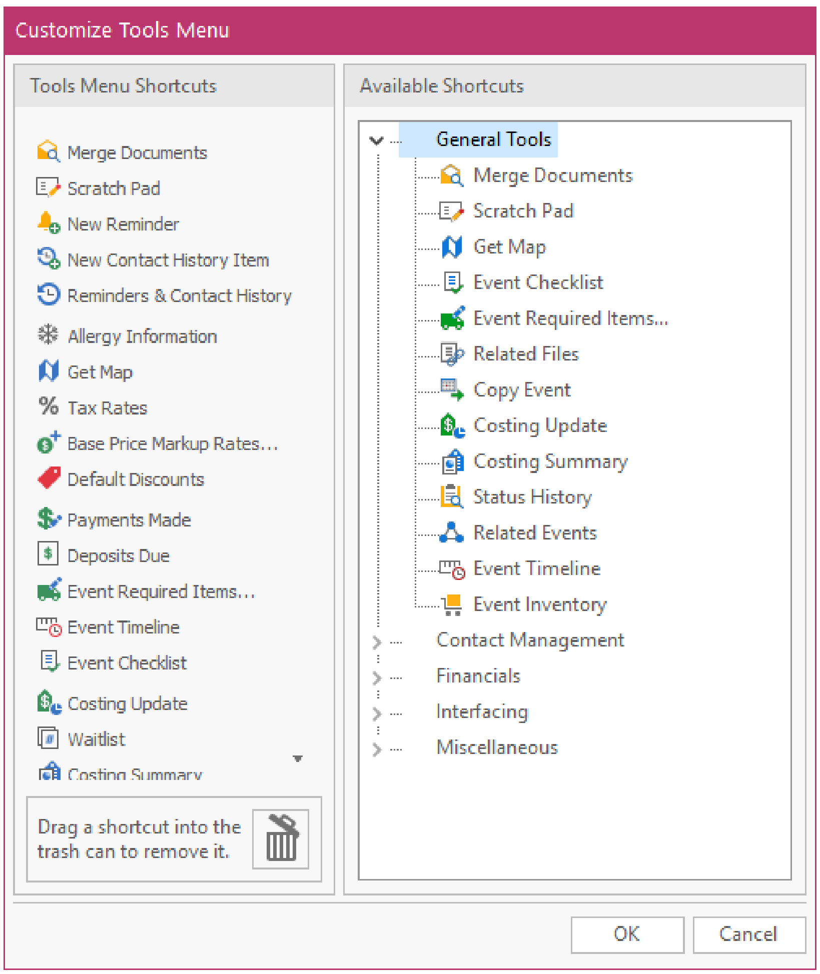


(See http://support.caterease.com/20/helpmenu/Content/Event_Manager/Creating_a_Checklist_of_To-Do_Items.htm)

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 for yourself or for other users within your Caterease network.

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.

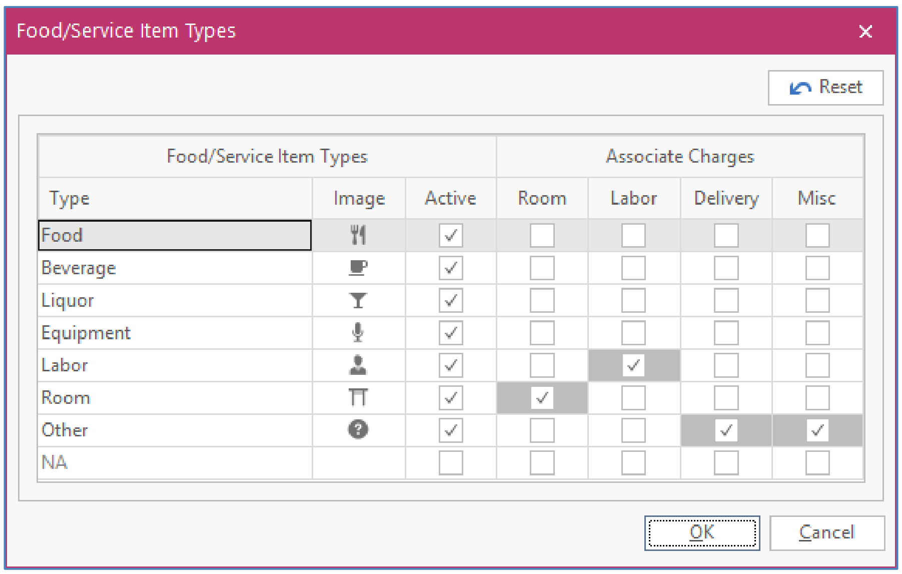


(http://support.caterease.com/20/helpmenu/Content/General_Information/Customizing%20the%20Tools%20Menu%20and%20Tool%20Bar.htm)

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**.

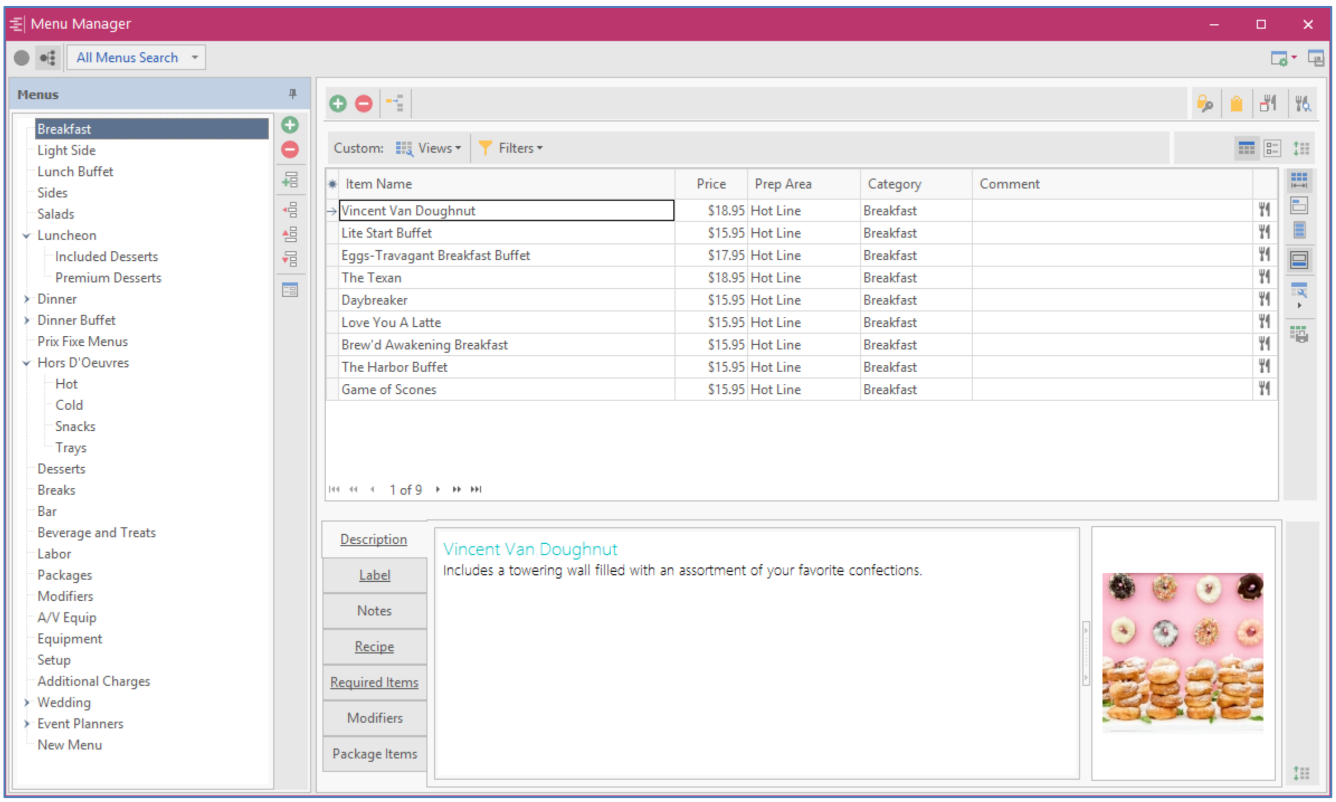


(http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Setting%20Up%20Food%20Service%20Item%20Types.htm)

Create Your Menus

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.



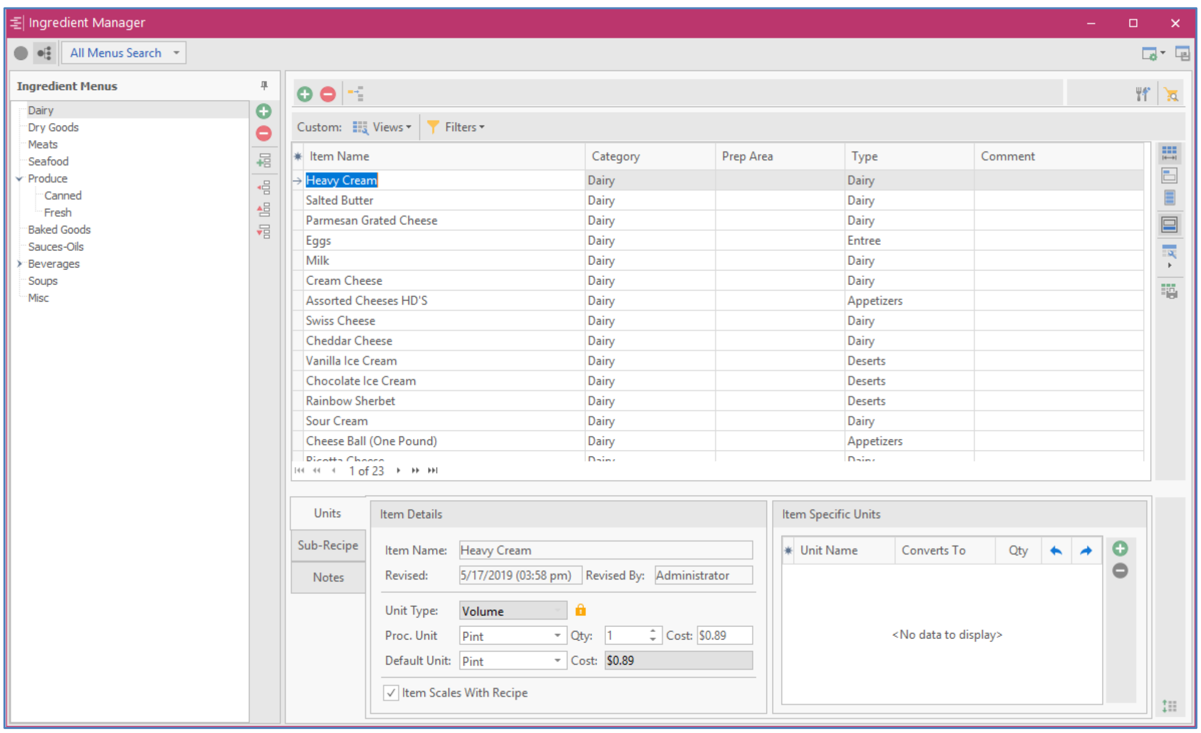
(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Adding_a_New_Menu.htm)

Create an Ingredients List

> tip 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.

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.

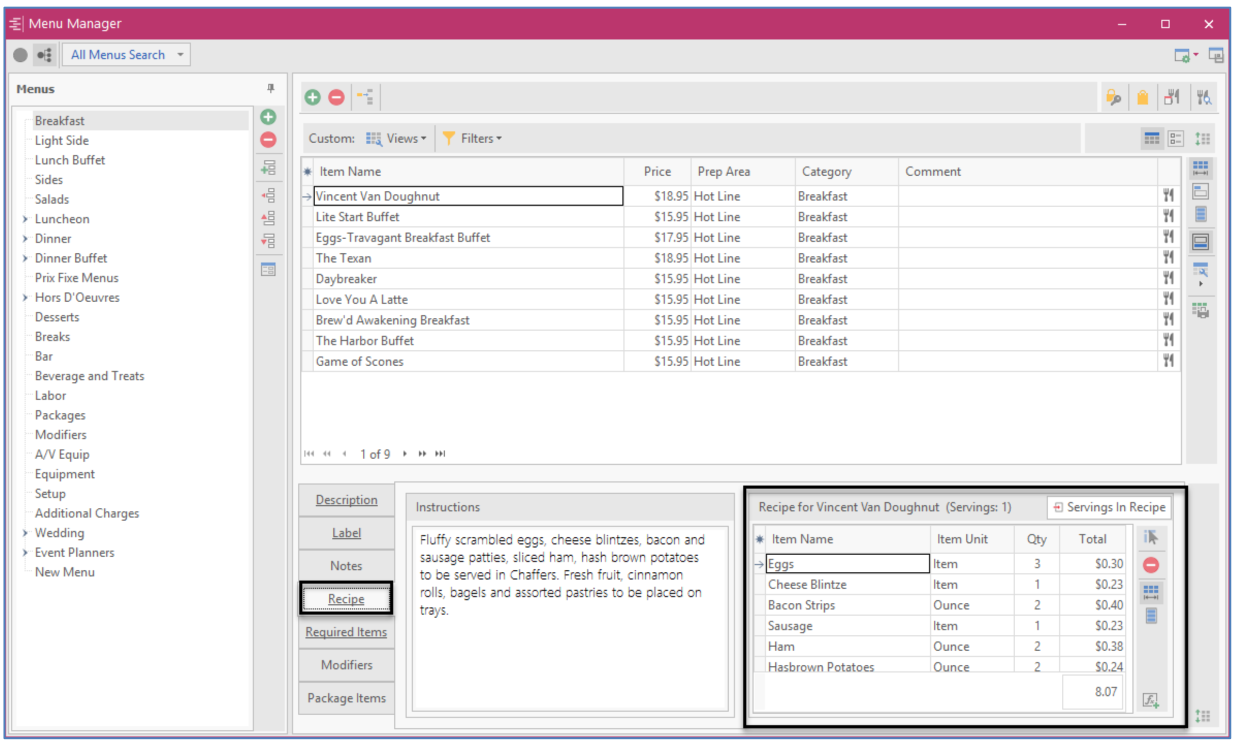


(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Building%20Ingredients%20Lists.htm)

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.*



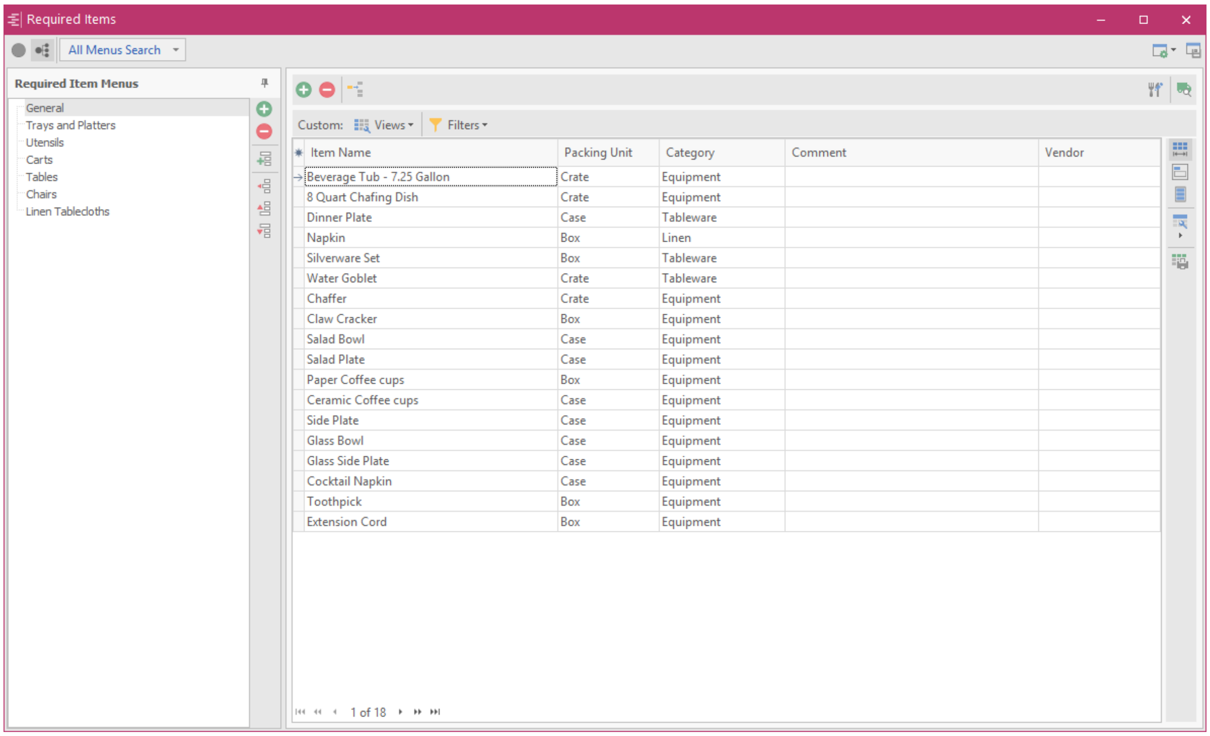
(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Building%20Ingredients%20Lists.htm)

Note: *Refer to the Ingredient Supplement at the end of this guide for additional details.*

Create a Required Items List

> **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.

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.

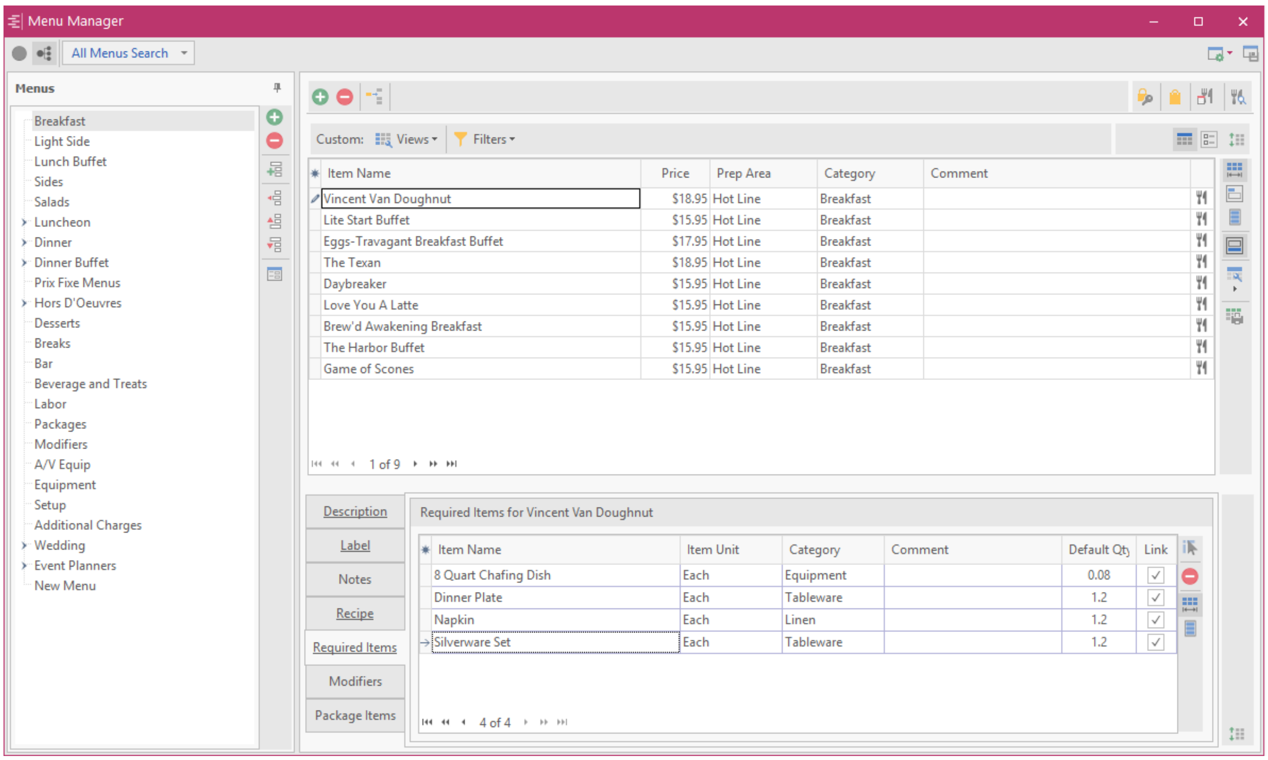


(See [http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Building%20Required%20Items%20Lists.htm)](http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Building%20Required%20Items%20Lists.htm)

Assign Required Items

> 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.

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.

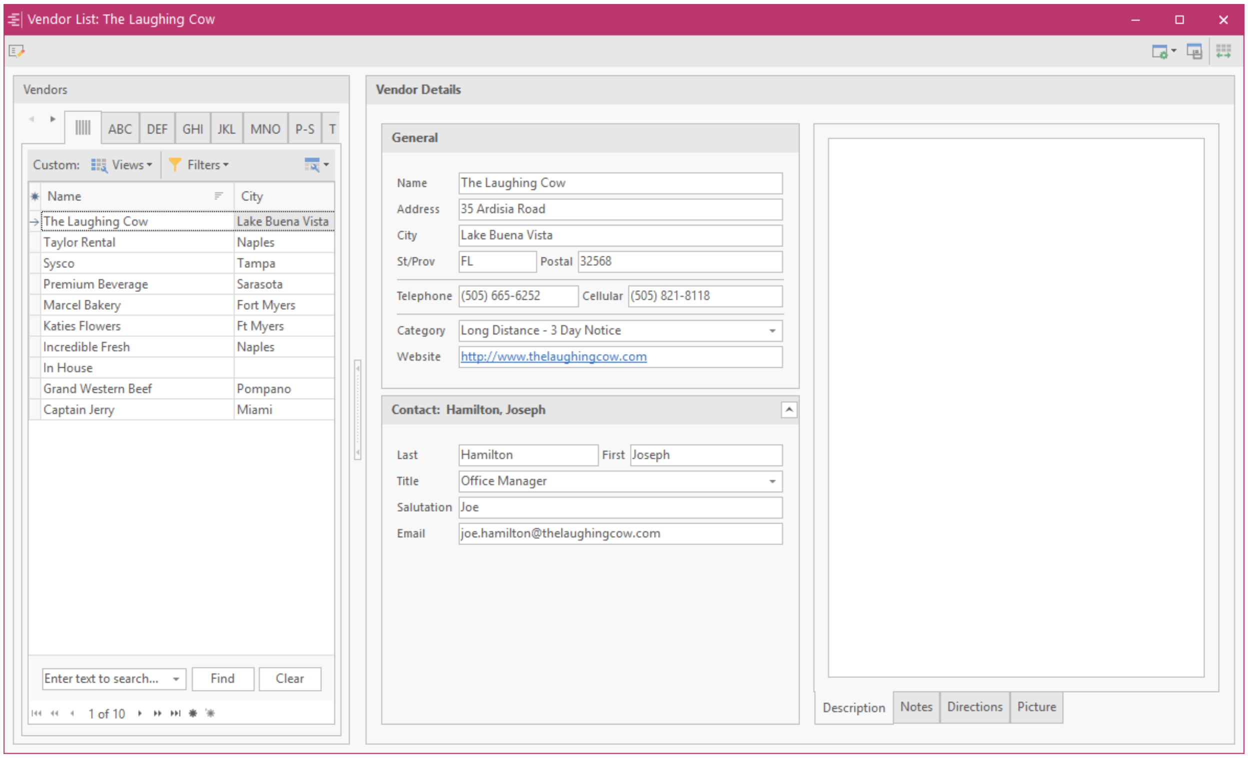


(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Building%20Required%20Items%20Lists.htm)

Add Vendors

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

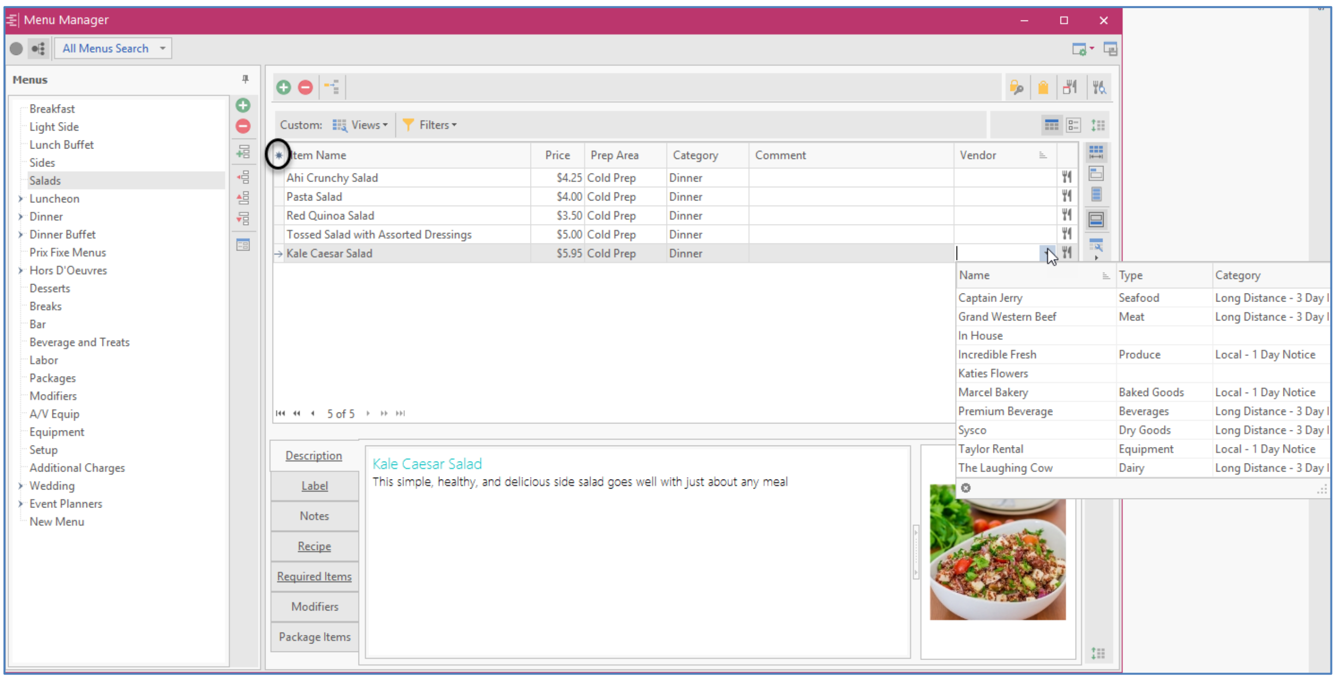
1. Click the **Setup** sidebar.
2. Click the **Vendor List** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top
4. Enter additional information into each field.
5. Optionally add a Description, Notes, Directions, or Picture.



(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Creating%20Default%20Vendor%20Lists.htm and http://support.caterease.com/20/helpmenu/Content/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 for yourself or for the other users on your Caterease network every time you open Caterease.



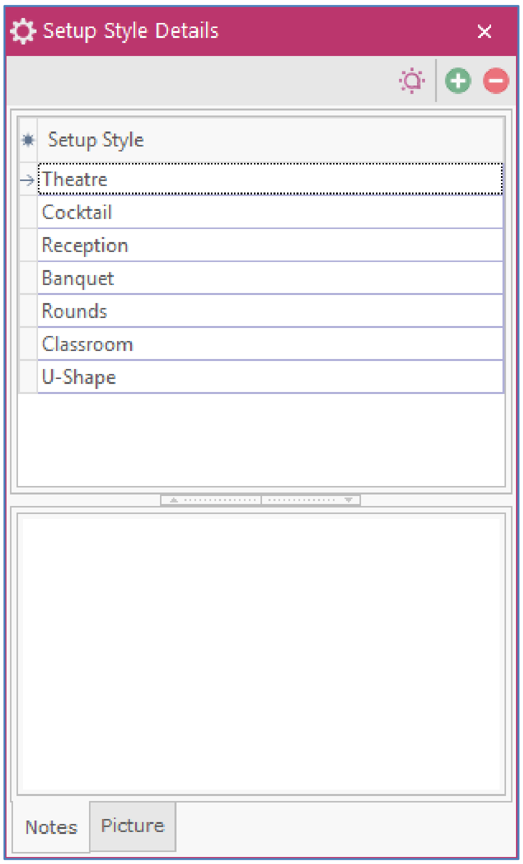
(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Creating%20Default%20Vendor%20Lists.htm)

Room/Venue Customization

Add a Master List of Setup Styles

tip 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.

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/20/helpmenu/Content/Setup/Setting%20up%20Banquet%20Rooms.htm)

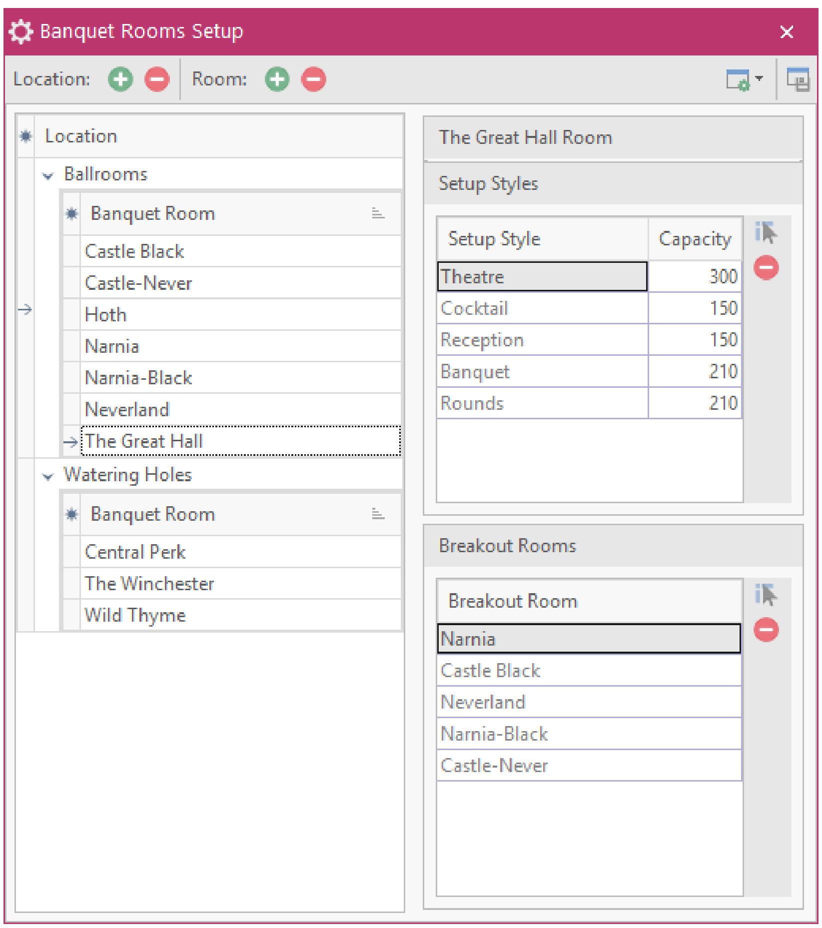
Create Locations to Group Your Rooms (Optional)

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/20/helpmenu/Content/Setup/Setting%20up%20Banquet%20Rooms.htm)*

Add Banquet Rooms to Your Locations

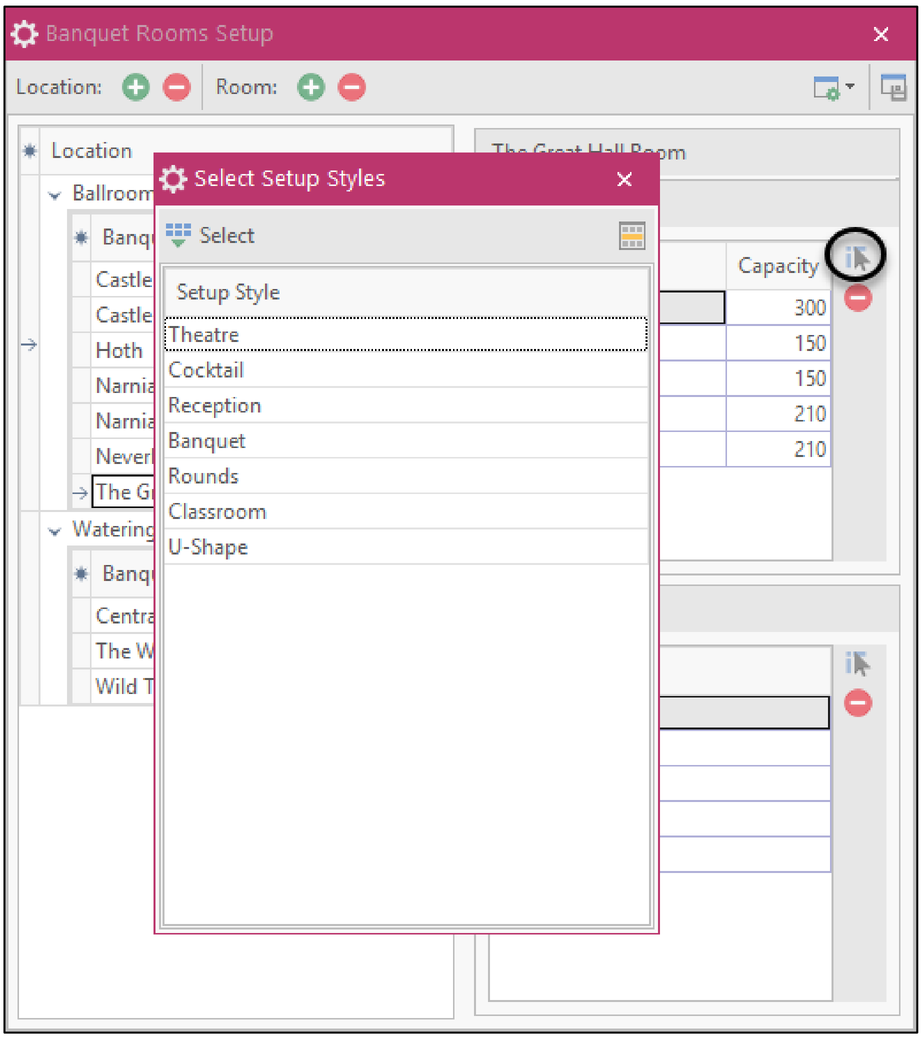
1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. In the left-hand pane of the window, select the location you want to add a new room to.
4. Click the **Add Room** button , located at the top left-hand side of the window.
5. Type a name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



(See http://support.caterease.com/20/helpmenu/Content/Setup/Setting%20up%20Banquet%20Rooms.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.

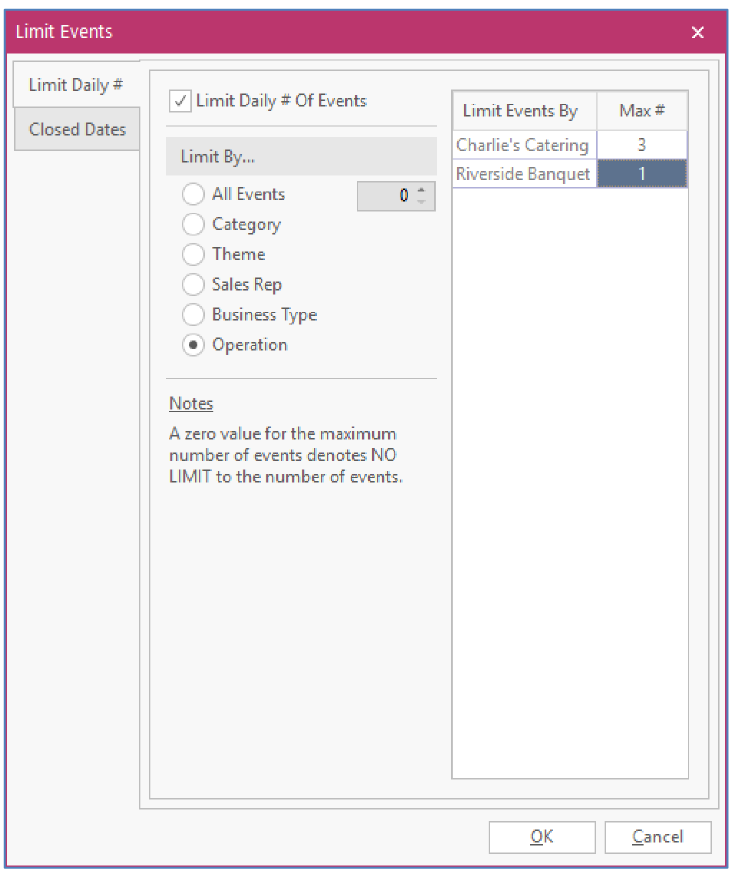


(See http://support.caterease.com/20/helpmenu/Content/Setup/Setting%20up%20Banquet%20Rooms.htm)

Restrict Events

tip Perhaps your company has a policy that it only does one off-premise party per day. Or perhaps you limit the number of events you hold each day with a certain theme. Or maybe you just have a fixed limit (meaning you can only do “x” number of events per day). In any case, you can set these limits easily and let Caterease keep track of it all for you.

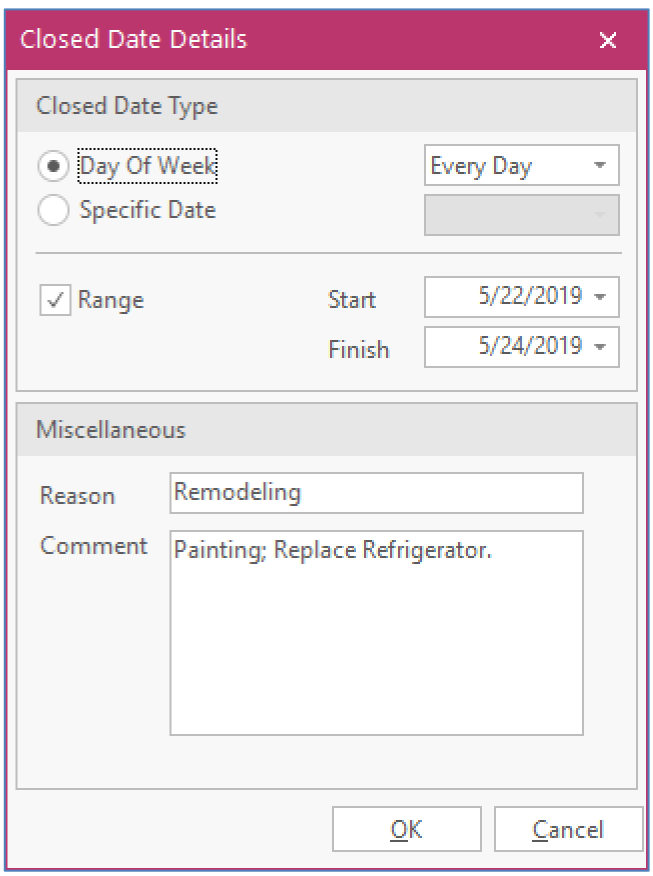
1. Click the **Administration** ribbon tab at the top of your screen.
2. Click the **Options** button and choose **Restrict Events**. *(Not available in Express.)*
3. Click into the checkbox labeled **Limit Daily # Of Events**, located on the **Limit Daily #** tab.
4. Select an option under **Limit By** ... .
   Result*: With any choice other than* ***All Events****, the corresponding quickpick list is displayed on the right-hand side of the window.*
   Note*: If you select* ***All Events****, simply enter a daily maximum number by clicking into the field and typing or by using the up-and-down arrows to adjust the number.*
   Important Note*: A zero value in the* <u>*Max #*</u> *field means there is no limit to the number of daily events.*
5. Click into each row on the right-hand side of the window and enter a maximum number (Max #) for each selection.
   Note*: Skip this step if you chose* ***All Events*** *in Step 4, above.*
6. When finished, click **OK**.



(See http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_Daily_Event_Limits.htm)

Establish "Closed Dates" for Your Company

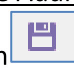
1. Click the **Administration** ribbon tab at the top of your screen.
2. Click the **Options** button and choose **Restrict Events**. *(Professional version only.)*
3. Click the **Closed Dates** tab.
4. Click the **Add Record** button , located on the upper right-hand side of the window.
5. Click the radio button to the left of **Day of Week** if you would like to indicate non-availability for a certain day of the week, then choose the desired day from the drop-down list at the right-hand side of the window.
   Result: *The* ***Range*** *option becomes available. Click into the* ***Range*** *checkbox. Access the drop-down calendar tool to the right of the Start and Finish fields to set a closed-for-business date range.*
   Note: If you did not choose **Day of Week,** click the radio button to the left of **Specific Date** and access the drop-down calendar to the right of the field to select one specific closed-for-business date.
6. **[Optional]** Type a reason for the closure into the Reason field.
7. **[Optional]** Type a comment for the closure into the **Comment** text box.
8. When finished, click **OK.**

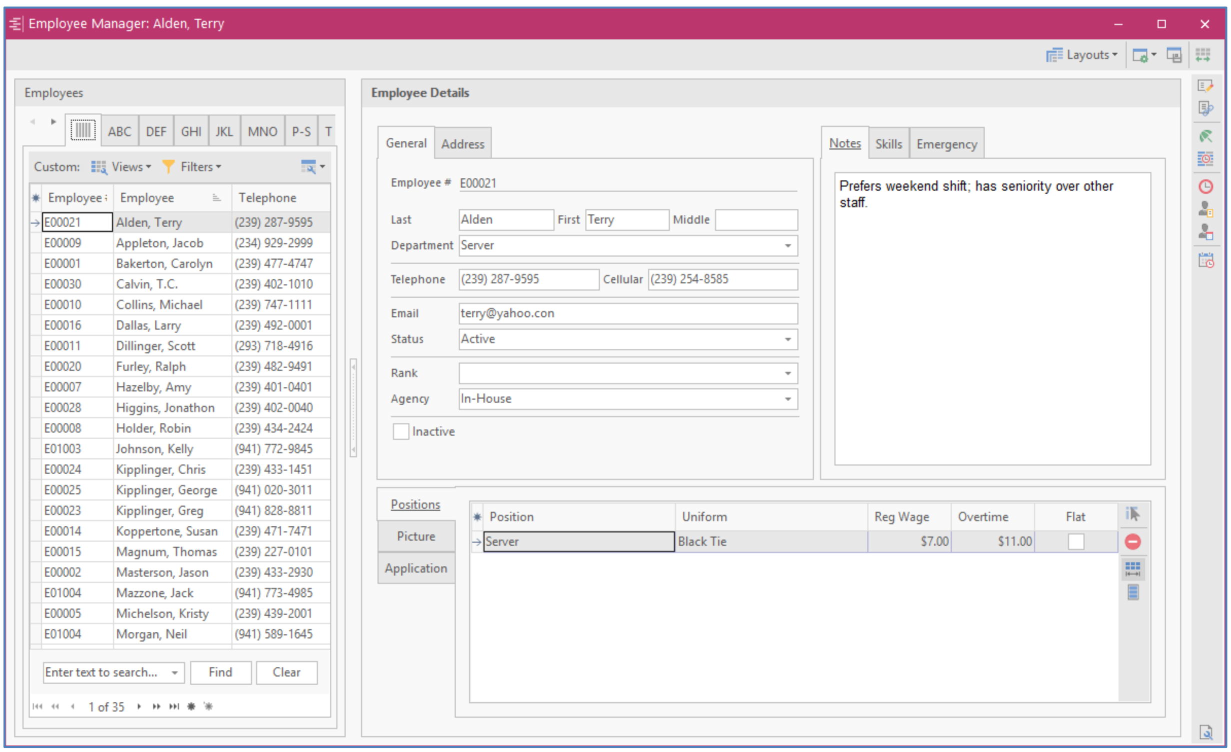


(See http://support.caterease.com/20/helpmenu/Content/Setup/Establishing_Daily_Event_Limits.htm)

Staff/Position Setup/Customization

Add Employees

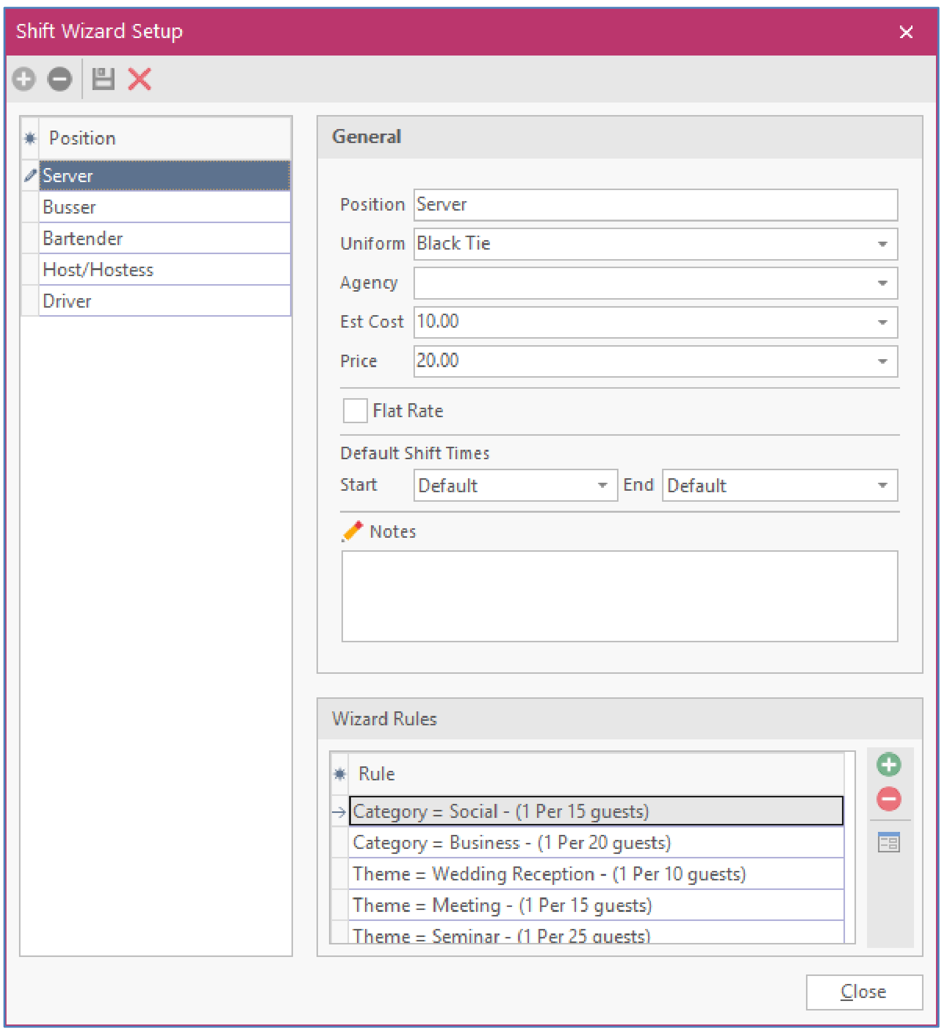
1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of the screen**.**
4. Click **Yes** at the confirmation prompt.
5. Type the employee's last name into the Last field, and press **[Tab] or [Enter].**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



(http://support.caterease.com/20/helpmenu/Content/Setup/Employee_Manager/Creating%20a%20Default%20List%20of%20Employees.htm)

Add Positions

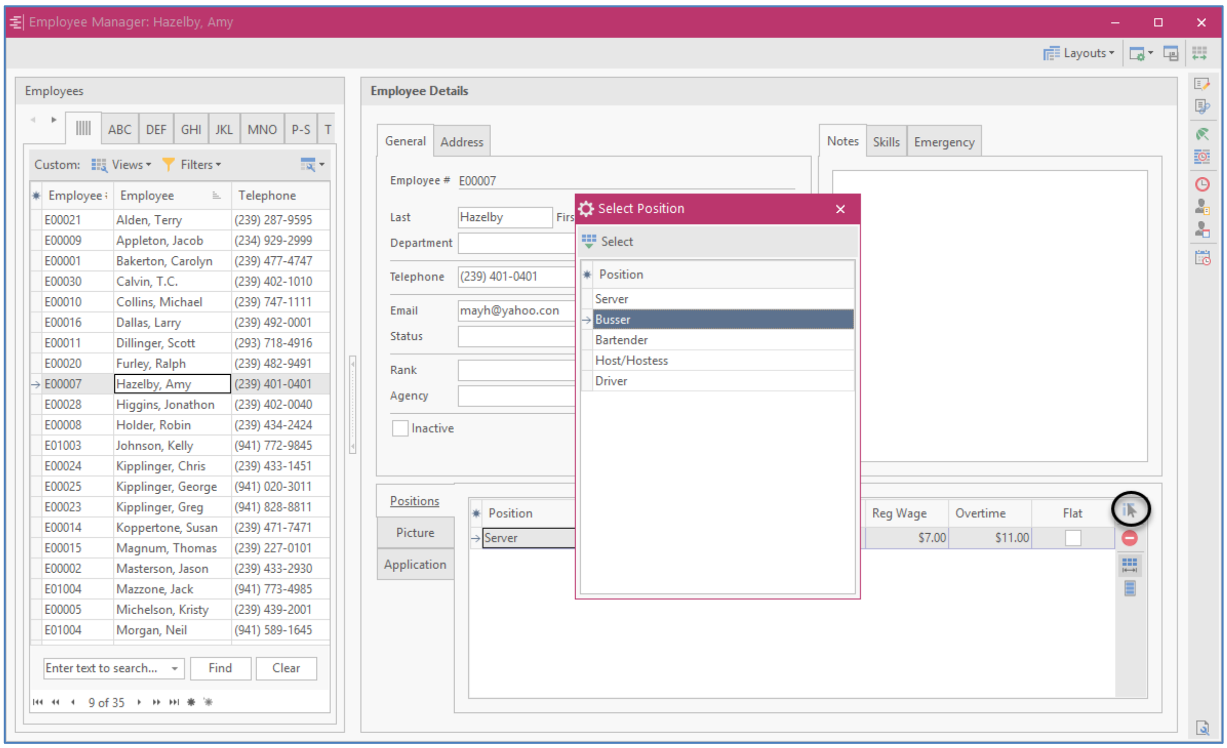
1. Click the **Main** sidebar.
2. Click the **Employee Manager** button**.**
3. Click the **Tools** button and select **Shift Setup.**
4. Click the **Add Position** button , located at the top left-hand side of the window.
5. Click **Yes** at the confirmation prompt.
6. Type the name of the position 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.



(See http://support.caterease.com/20/helpmenu/Content/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.

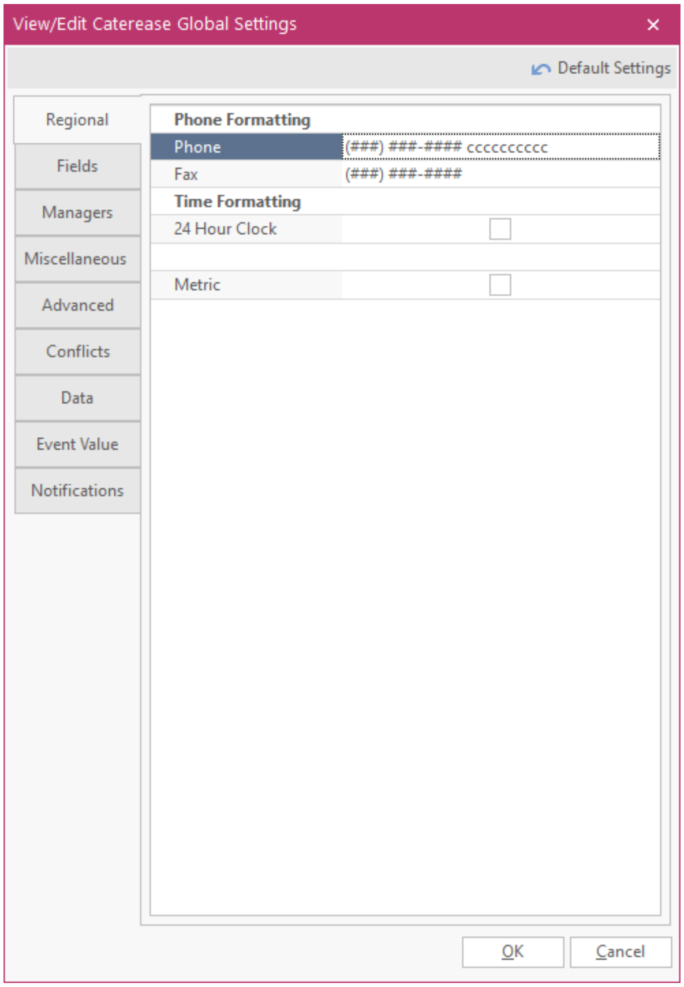


(http://support.caterease.com/20/helpmenu/Content/Setup/Employee_Manager/Assigning%20a%20Position%20to%20an%20Employee.htm)

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**.

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.



(See http://support.caterease.com/20/helpmenu/Content/Setup/Editing_Global_Settings.htm)

Resources for Additional Setup Tasks

- Context-Sensitive Help (In any area of your program, press the **[F1]** key on your keyboard. You will see context-sensitive help that is specifically applicable to wherever you are in the program, complete with links to full-length topics.)
- Online Help Menu (Help ribbon tab > Caterease Help > Index or Search)
- Tip of the Week Videos https://www.caterease.com/category/tip-of-the-week/
- Documentation https://www.caterease.com/support/documentation/

Caterease Connect Mobile App

- Using the Caterease Connect Mobile App (Online Help topic, including Setup. ***Note:** The login to your mobile app is different from your regular Caterease login.)*
- https://fast.wistia.net/embed/iframe/usdy8vx4o5?popover=true (Setup Video)

Security

- Enabling System Security (Online Help Topic)
- Adding a New User (Online Help Topic)
- https://www.caterease.com/setting-security-group-users-one-time/ (Tip of the Week Video)

Supplement: Exploring Ingredient Manager

Using the Unit Builder Utility

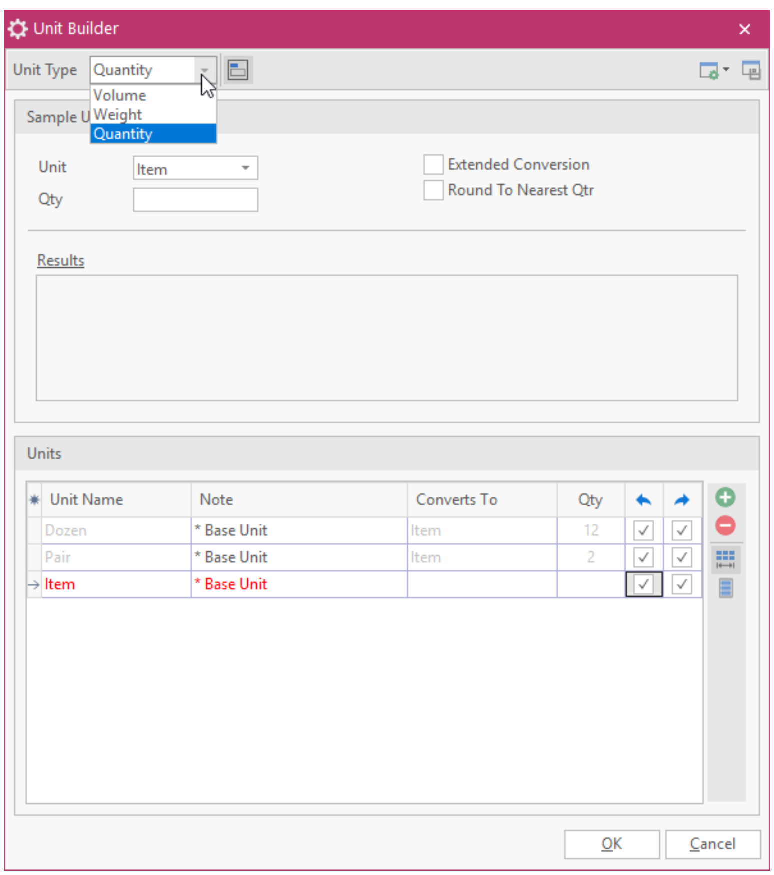
The Unit builder utility allows users to build units of measure for ingredients and establish their respective conversion rates. Some "units of measure" might be unique to specific ingredient items, even if they appear to be generic. For example, a "box" is quite different when it measures salt than when it measures cereal.

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

1. Is this a BASE unit, meaning is this unit the smallest unit a particular ingredient can be measured in (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 (in this example, bread).
2. 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).
3. 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 a required item or packing unit; it should *not* be an ingredient unit.

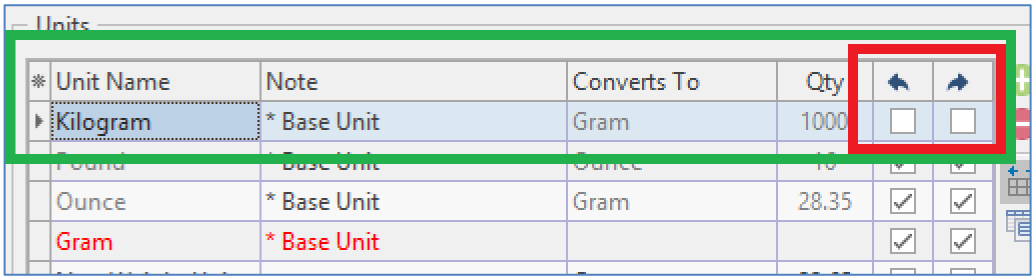
Accessing the Unit Builder

To access the Unit Builder, click the **Administration** ribbon tab > **Lists** > **Unit Builder**.



Three standard measurement Unit Types are available: **Volume**, **Weight**, and **Quantity**. Each unit type has several base units and one lowest base unit.
*(**Note:** These units cannot be deleted from Caterease, as each unit converts into another unit; however, you can add to these units. An ingredient must be a member of a Unit Type. If you add an Ingredient-Specific Unit, as defined in your Ingredient Manager, they will be available for this ingredient in addition to your core units.)*

Important Note: To disable specific conversions, such as Kilogram, you just need to uncheck the conversions.



Creating Custom Units of Measure for Ingredients with Unit Builder

> tip The lowest base unit is indicated by red font. The lowest base unit does not convert to any other unit. Unless you are an Administrator, Unit Type cannot be changed if an ingredient is already in use in a sub-recipe or a menu recipe.

1. To add Unit Types to each family type, click the **Add Record** button, located on the right-hand side of the Unit Builder window.
***Result:** A line is added to the bottom of the list.*
2. Define the new unit and its relationship to any other unit by typing over the words **New Volume Unit**, **New Weight Unit**, or **New Quantity Unit**, as applicable.

- **Convert From:** When checked, the unit will be available in any unit selection drop-down.
- **Convert To:** When checked, this unit will be used in conversions from other smaller units.

3. Enter a quantity into the Qty field.
4. When finished, click **OK**.

Volume	**Weight**	**Quantity**
Gallon	Kilogram	Dozen
Liter	Pound	Pair
Quart	Ounce	*Item (Lowest Base Unit)
Pint	*Gram (Lowest Base Unit	
Cup		
Fluid Ounce		
Tablespoon		
Milliliter (Lowest Base Unit)		

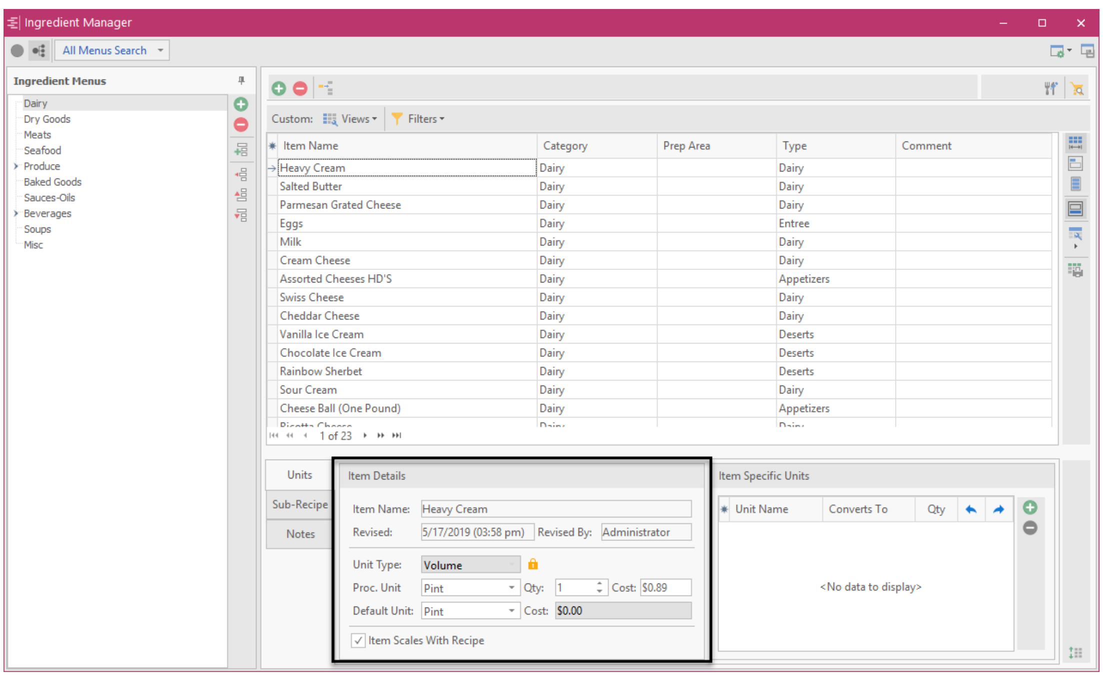
Using the Item Details View – Units Tab

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

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

The **Item Details** view allows you to manage ingredient-specific units, unit pricing, and unit conversions.

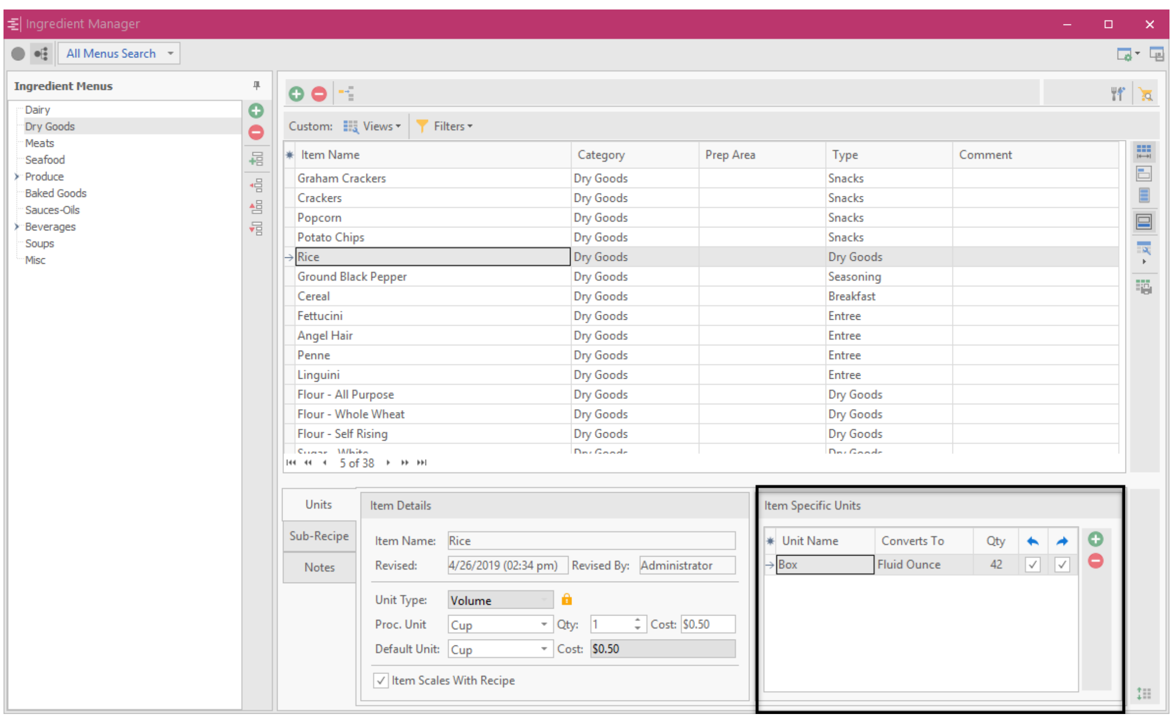
- **Item Name** - Refers to the name of the ingredient item.
- **Revised** - Provides a date- and time-stamp of when an item was revised (modified).
- **Revised By** - Indicates the user name of the person who revised the ingredient item.
- **Unit Type** - Three standard Unit Types are available: Volume, 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-ingredient has a **Recipe 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.



Creating Item-Specific Units

Some units of measure might be unique to specific ingredient items. 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 <u>Unit Name</u> field. In the example below, the unit name will be Box.
6. Click the down arrow to the right of the <u>Converts To</u> field and choose an option from the list. In our example, we will choose Ounce.
7. Type the quantity into the <u>Qty.</u> 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.*

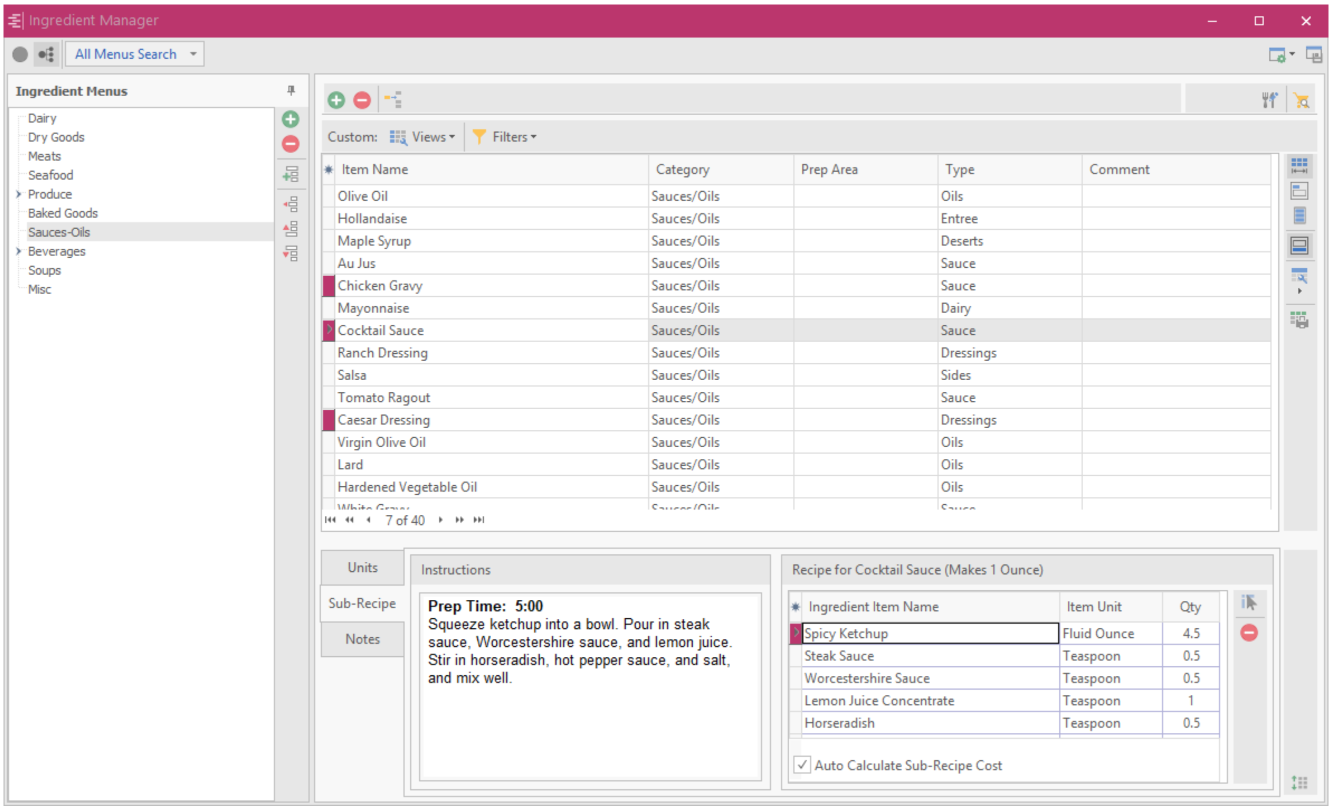


Using Sub-Recipes and Nested Sub-Recipes

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

Click the **Sub-Recipe** tab to view ingredients and their respective units and quantities that make up the highlighted item. In the example below, Cocktail Sauce is the main ingredient. Spicy Ketchup (which is also highlighted) is listed as a sub-ingredient of Cocktail Sauce.

tip Click on a Sub-Recipe to view any nested sub-recipes that have been added. In the example provided, Spicy Ketchup, which is a sub-recipe of Cocktail sauce, has a nested sub-recipe of Sage Dressing (also highlighted, in order to group the relationship with the sub-recipe and recipe).



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