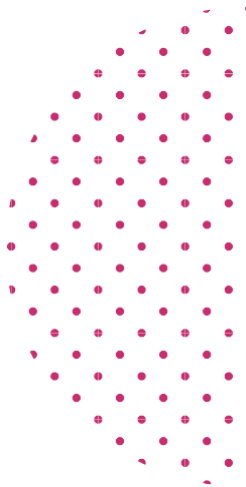
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Quick Reference Guide: *Program Setup*

Table of Contents

General Setup/Customization	4
Set Up Default Tax, Service Charge, and Gratuity	4
Rename Existing Fields	5
Create User-Defined Fields	6
Add User-Defined Fields to Your Screen	7
Set Up/Customize Quickpick Lists	8
Establish New Booking Defaults	9
Establish Required Fields	10
Establish Conditional Deposit Schedules	11
Set up Automatic Change Notifications	13
Set Up the Scratch Pad	15
Add Users	16
Add Sales Reps	17
Configure E-mail Settings	18
Add Default Site Locations	19
Set Up Default Timelines	20
Set Up Default Checklists	21
Customize Your Tools Menu and Toolbar	22
Menu Setup/Customization	23
Customize Food/Service Item Types	23
Create Your Menus	24
Create an Ingredients List	25
Assign Ingredients	26
Create a Required Items List	27
Assign Required Items	28
Add Vendors	29
Assign Vendors	30
Room/Venue Customization	31
Add a Master List of Setup Styles	31
Create Locations to Group Your Rooms (Optional)	32

Add Banquet Rooms to Your Locations.....	32
Establish Setup Styles and Capacities for a Room.....	33
Restrict Events.....	34
Establish “Closed Dates” for Your Company.....	35
Staff/Position Setup/Customization	36
Add Employees.....	36
Add Positions.....	37
Assign Positions.....	38
Global Settings Customization	39
Resources for Additional Setup Tasks	40
Caterease Connect Mobile App.....	40
Security.....	40
Supplement: Exploring Ingredient Manager	41
Using the Unit Builder Utility	41
Accessing the Unit Builder	41
Creating Custom Units of Measure for Ingredients with Unit Builder.....	42
Using the Item Details View – Units Tab	43
Creating Item-Specific Units.....	44
Using Sub-Recipes and Nested Sub-Recipes	45

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, 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**.



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	16	0
Beverage	7	0	0	0	0	16	0
Liquor	7	0	0	0	0	16	0
Equipment	7	0	0	0	0	16	0
Labor	7	0	0	0	0	16	0
Room	7	0	0	0	0	16	0
Other	7	0	0	0	0	16	0
NA	0	0	0	0	0	0	0

Tax Exempt
☐ Tax Exempt
Exempt #
Expires

Additional Adjustments
Subtotal \$0.00
Tax 1 \$0.00
Tax 2 \$0.00
Tax 3 \$0.00
Gratuity \$0.00
Serv Chg \$0.00

Item Codes

OK Cancel

(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.)*



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.

Customize Names	
Reset Names	
General	
Client/Organization	Client/Organization
Party Name	Party Name
Sales Representative	Sales Rep
Coordinator	Coordinator
Reference	Reference
Loyalty #	Loyalty #
Required Items	Required Items
Client Group	Group
Financials	
Gratuity	Gratuity
Service Charge	Serv Chg
Taxes	Taxes
Tax 1	Tax 1
Tax 2	Tax 2
Tax 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	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

(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


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**.

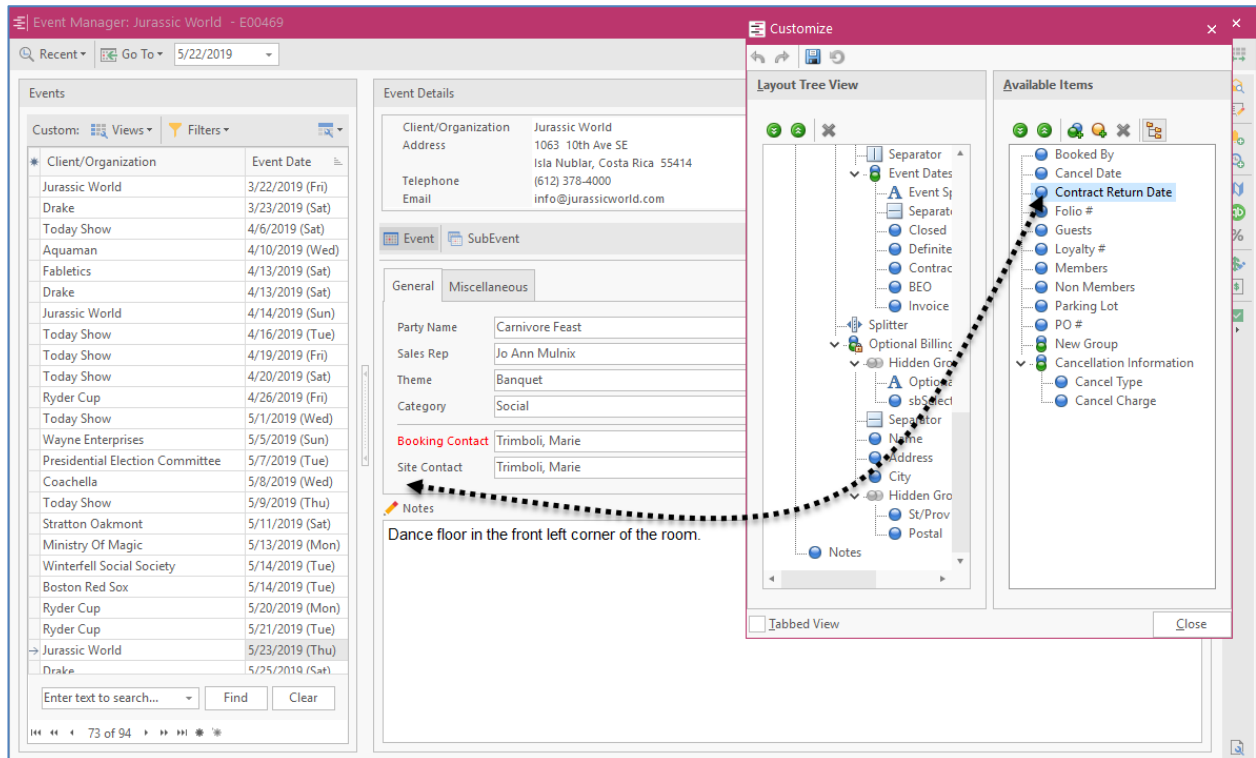
tip You can create user-defined fields to keep track of information (about your clients, events, menu items, etc.), that is unique to your company. These fields can be displayed anywhere in their respective areas of the program or on prints.

	Name Of Field	Type
1	Contact Type Preference	Text
2	Contact Time Preference	Text
3		Phone
4		Number
5		Currency
6		Date
7		Time
8		Text
9		Text
10		Text
11		Text
12		Text
13		Text
14		Text
15		Text
16		Text
17		Text
18		Text
19		Text
20		Text

(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.

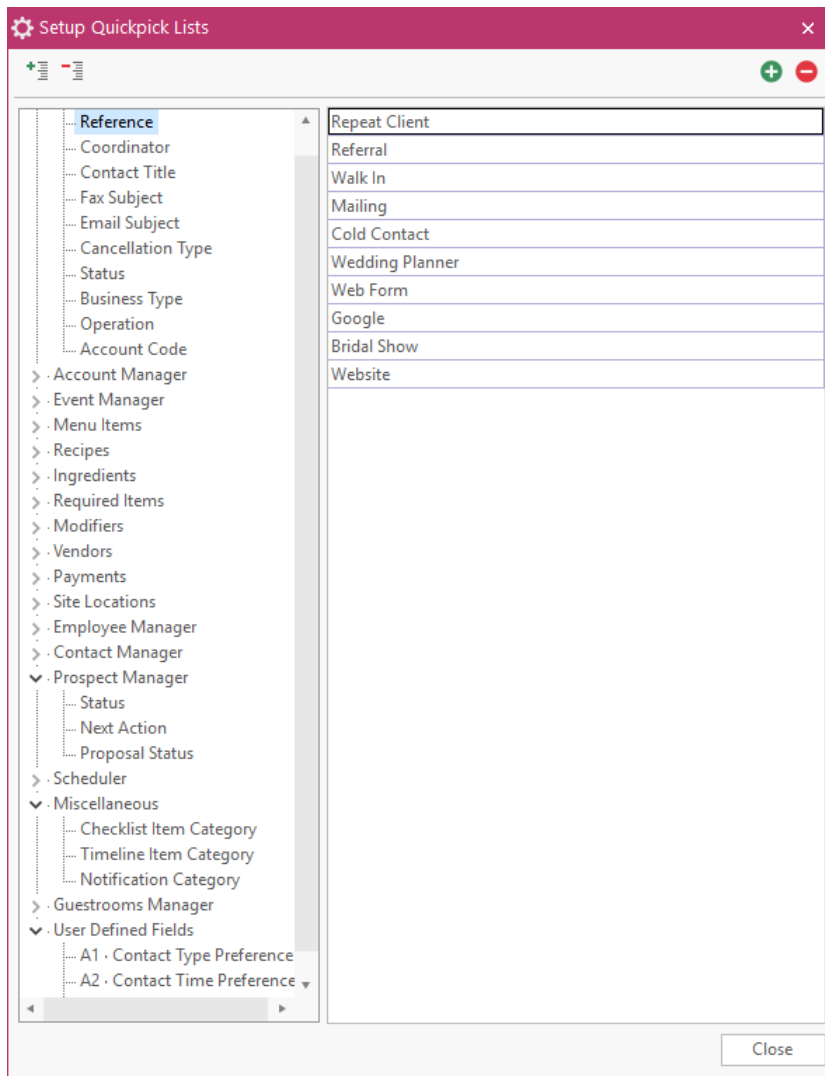


(See http://support.caterease.com/20/helpmenu/Content/Setup/Creating_User_Defined_Fields.htm)

Set up/Customize Quickpick Lists

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**.

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.*



(See http://support.caterease.com/20/helpmenu/Content/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	
	Theme	Banquet
Employees	Reference	
	Category	Social
SubEvents	Pay Method	Credit Card
Prospects	Business Type	On-Premise
	Operation	Riverside Banquet Center
Guestrooms	Default From Account Fields	
	Party Name From Client/Or...	<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/20/helpmenu/Content/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.

The 'Required Fields' dialog box is shown. On the left, the 'Events' tab is selected. The 'Conditional Group' section shows a list of conditions: 'Business Type = Delivery', 'Business Type = On-Premise', 'Business Type = Wedding', and 'All Events'. The 'Required Fields' section on the right lists various fields with checkboxes to indicate if they are required. The 'Events' tab is selected at the bottom.


Field	Required
Event Date	<input checked="" type="checkbox"/>
Party Name	<input type="checkbox"/>
Theme	<input type="checkbox"/>
Category	<input type="checkbox"/>
Booking Contact	<input checked="" type="checkbox"/>
Site Contact	<input type="checkbox"/>
Miscellaneous	
Sales Rep	<input type="checkbox"/>
Coordinator	<input type="checkbox"/>
Reference	<input type="checkbox"/>
Business Type	<input type="checkbox"/>
Operation	<input type="checkbox"/>
Pay Method	<input type="checkbox"/>
Loyalty #	<input type="checkbox"/>
Parking Lot	<input type="checkbox"/>
Contract Return Date	<input type="checkbox"/>
Guests	
Optional Billing Information	
SubEvents	
Additional	

Events SubEvents

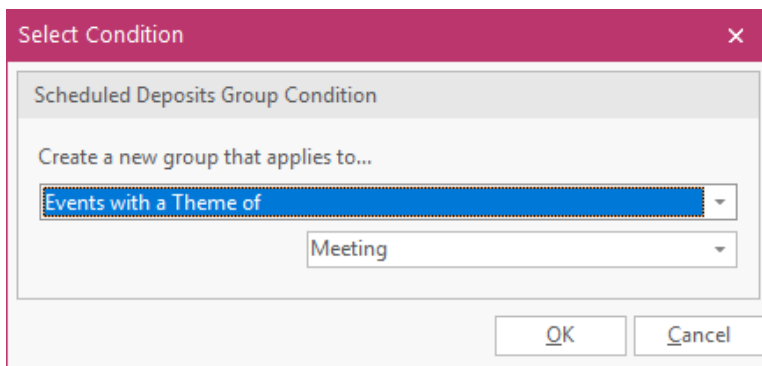
OK Cancel


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

Establish Conditional Deposit Schedules

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.



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.

Default Deposit Schedule

Conditional Group

Condition

Theme = Meeting

Theme = Wedding Reception

All Events

Summary Of Deposits

#	Deposit	When	From What
1	\$250.00	1 Day(s)	After The Booked Date
2	100%	1 Week(s)	Before The Event Date

1 of 2

Deposit Details

Set the deposit date for 1 Day(s)

After the Booked Date

and make the deposit An Amount of...

50 (%) of the Total balance due

\$250.00

Note:
Arrange scheduled deposits chronologically

OK Cancel

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)

Set up Automatic Change Notifications

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.)

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.

Notifications Setup

*

Name

Change In...

Change Of...

→

Date Change

Payment Change

SubEvents

Payments

Date

Amount

+

−

Grid

List

Notification Details

Name:

Date Change

Change In:

SubEvents

Type:

Change

Change Of:

Date

Category:

General Detail Change

Condition

(Date is next 7 days)

Notify Users

User Name

Text M:

Email

Administrator

☐

☒

John Smith

☐

☒

Kathy Wilson

☐

☒

OK



Cancel

(See [http://support.caterease.com/20/helpmenu/Content/General Information/User%20Notifications%20Module.htm](http://support.caterease.com/20/helpmenu/Content/General%20Information/User%20Notifications%20Module.htm))

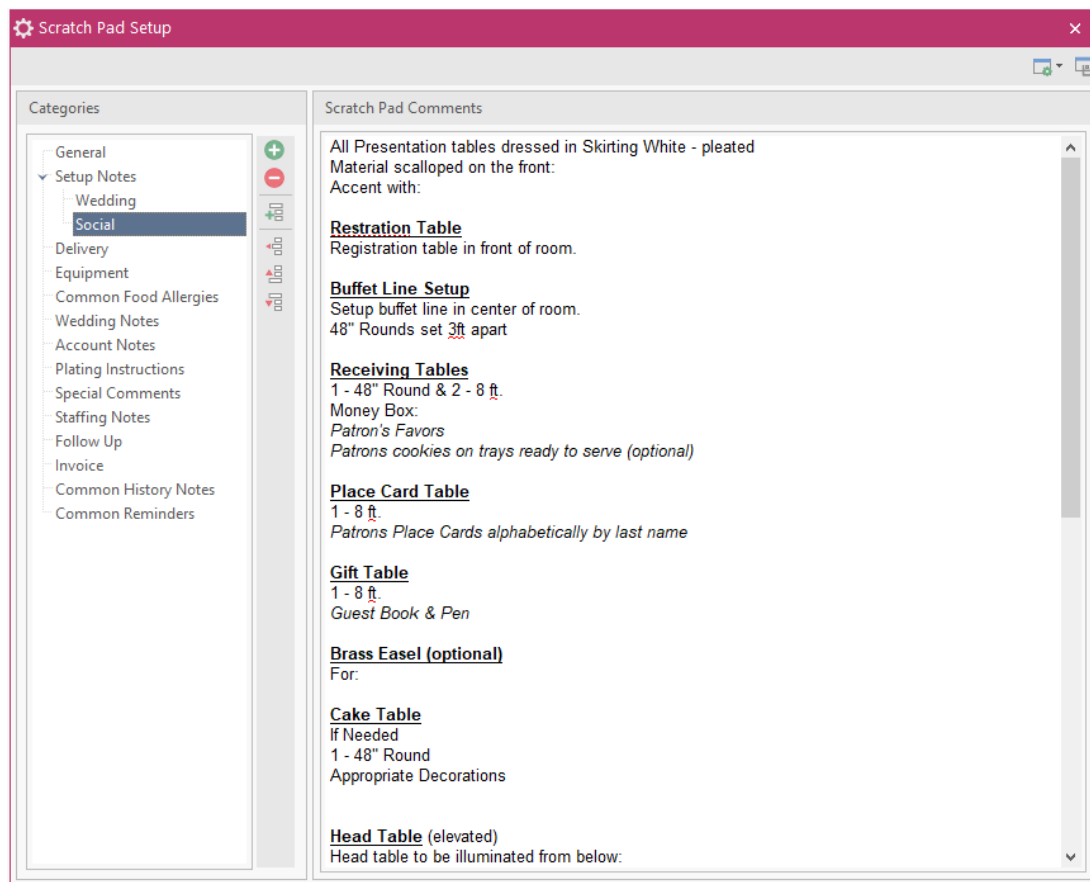
Set Up the Scratch Pad



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.

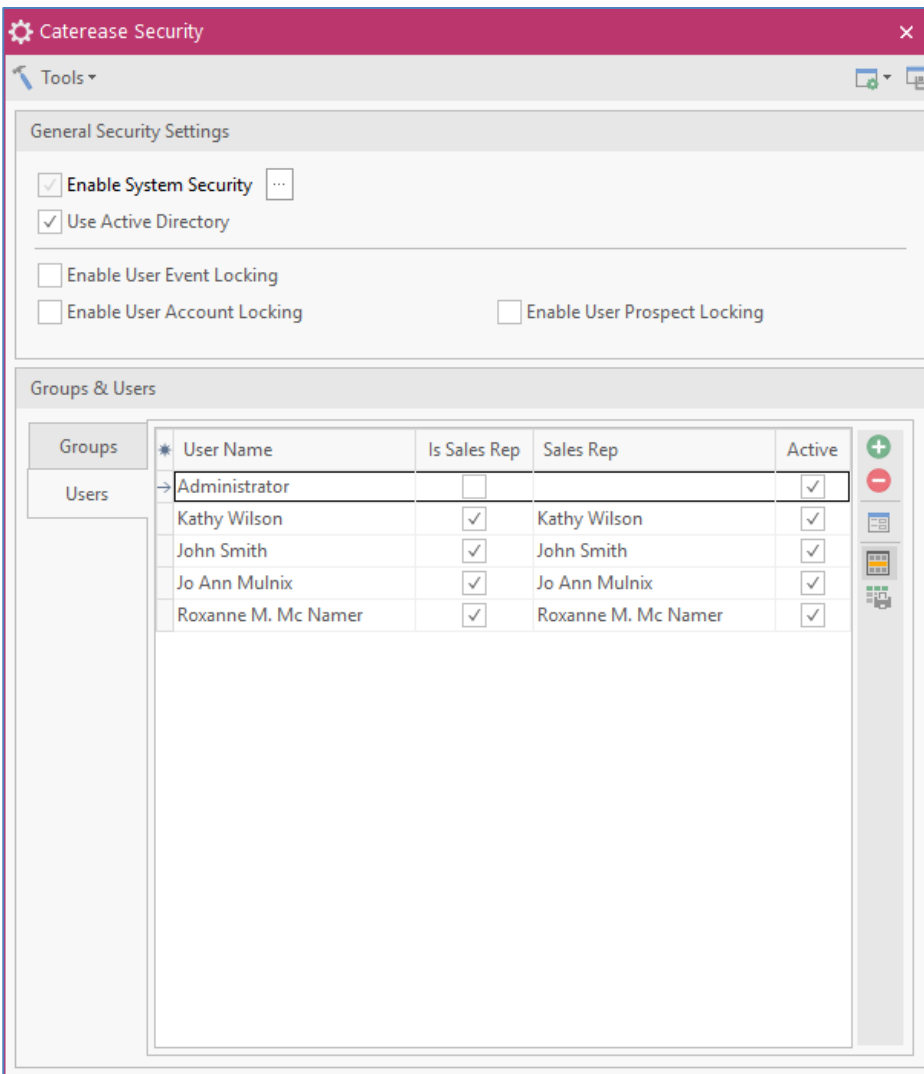
Note: You will be prompted to save your changes.



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


Add Users

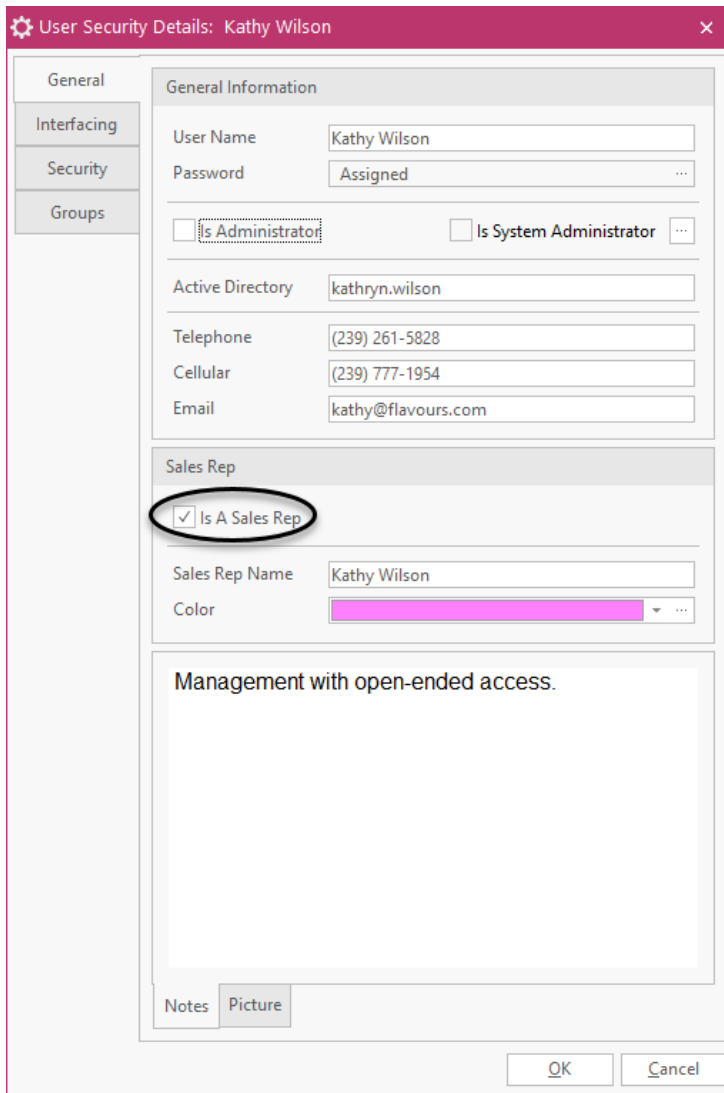
1. Click the **Administration** ribbon tab and choose **Security**.
2. Click the **Users** tab.
3. Click the **Add User** button , located on the right-hand side of the window.
4. Enter a User Name for the new user.
5. Click the ellipsis button to the right of the Password field to assign a password.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



(See http://support.caterease.com/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**.



The image shows a dialog box titled "User Security Details: Kathy Wilson". On the left is a sidebar with tabs: "General", "Interfacing", "Security", and "Groups". The "General" tab is selected. The main area is divided into sections: "General Information" with fields for "User Name" (Kathy Wilson), "Password" (Assigned), "Is Administrator" (unchecked), and "Is System Administrator" (unchecked); "Active Directory" (kathryn.wilson); "Telephone" ((239) 261-5828); "Cellular" ((239) 777-1954); and "Email" (kathy@flavours.com). Below this is the "Sales Rep" section, where the "Is A Sales Rep" checkbox is checked and circled in red. Other fields in this section are "Sales Rep Name" (Kathy Wilson) and "Color" (a pink color picker). At the bottom of the main area is a text block labeled "Management with open-ended access." and two tabs, "Notes" and "Picture". At the very bottom are "OK" and "Cancel" buttons.

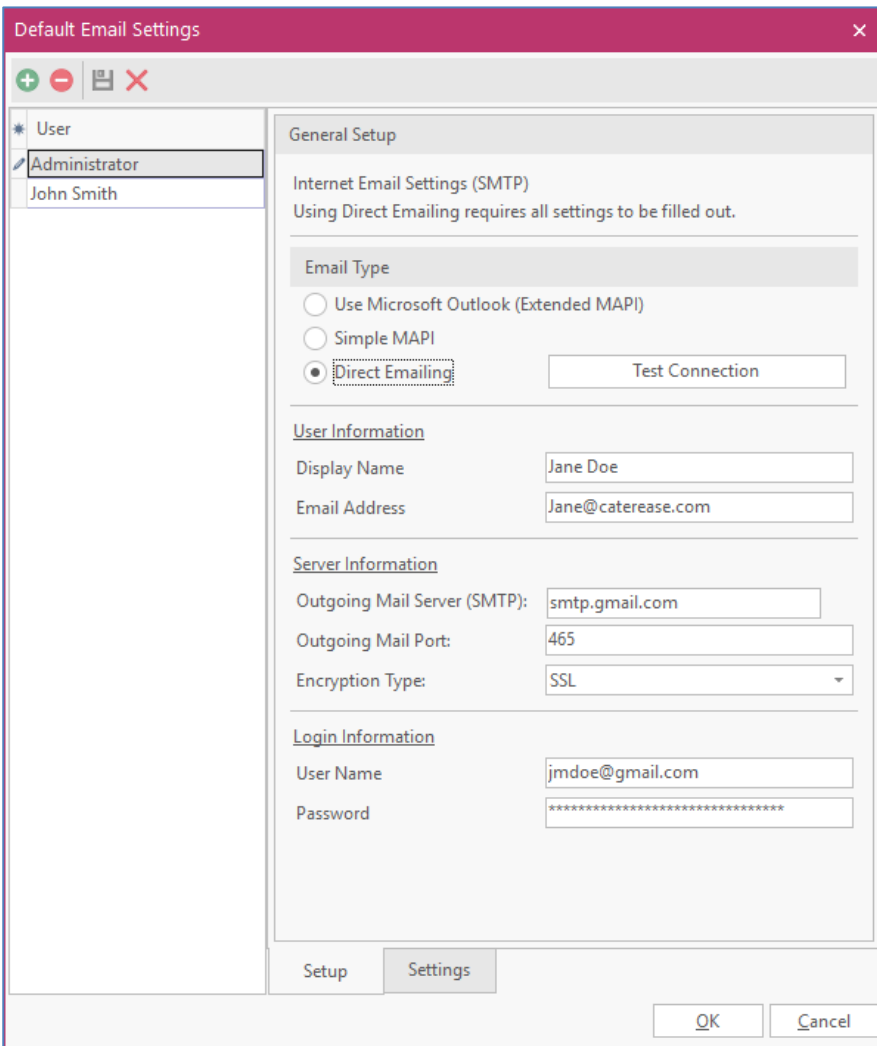
(See http://support.caterease.com/20/helpmenu/Content/Setup/Security/Adding_a_New_User.htm)

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, a 'User' list contains 'Administrator' and 'John Smith'. The 'Administrator' user is selected. The main area is titled 'General Setup' and contains the following sections:

- Internet Email Settings (SMTP)**: A note states 'Using Direct Emailing requires all settings to be filled out.'
- Email Type**: Three radio buttons are present: 'Use Microsoft Outlook (Extended MAPI)', 'Simple MAPI', and 'Direct Emailing' (which is selected). A 'Test Connection' button is located to the right of the 'Direct Emailing' option.
- User Information**: Fields for 'Display Name' (Jane Doe) and 'Email Address' (Jane@caterease.com).
- Server Information**: Fields for 'Outgoing Mail Server (SMTP):' (smtp.gmail.com), 'Outgoing Mail Port:' (465), and 'Encryption Type:' (SSL).
- Login Information**: Fields for 'User Name' (jmdoe@gmail.com) and 'Password' (masked with asterisks).

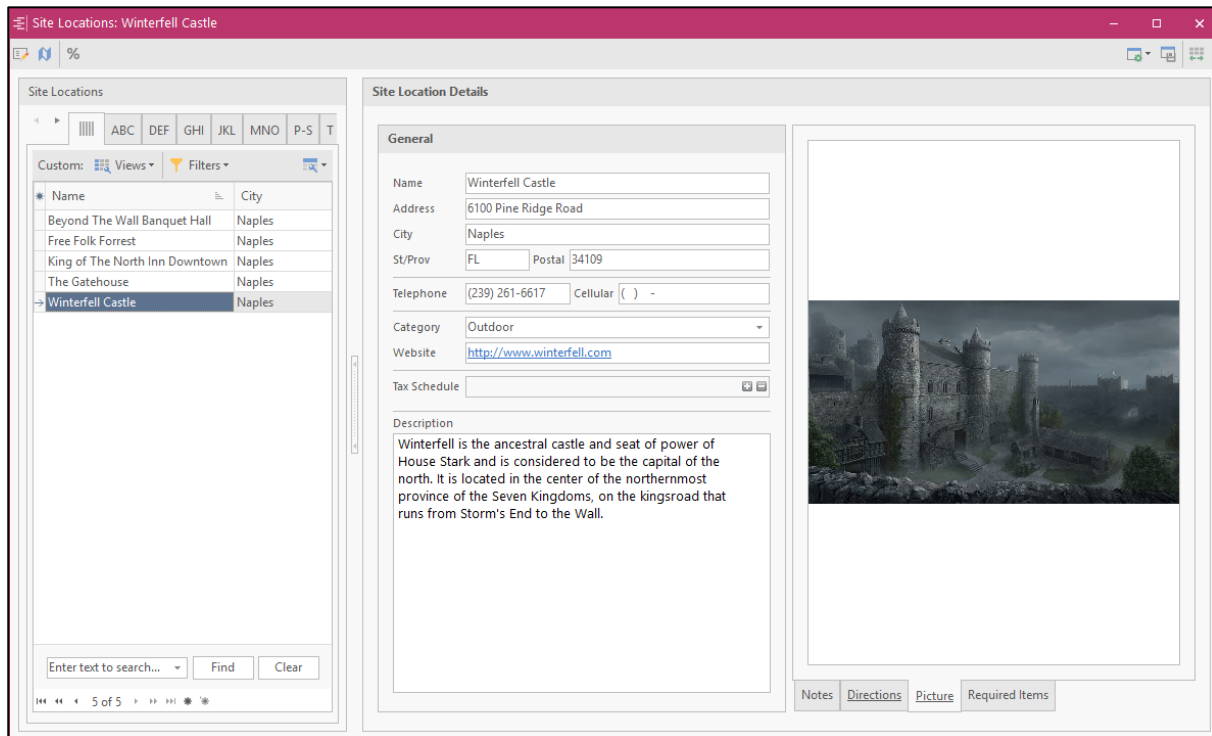
At the bottom of the dialog, there are two tabs: 'Setup' and 'Settings'. The 'Settings' tab is currently active. 'OK' and 'Cancel' buttons are located at the bottom right.

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

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.



Site Locations: Winterfell Castle

Site Locations

Name	City
Beyond The Wall Banquet Hall	Naples
Free Folk Forrest	Naples
King of The North Inn Downtown	Naples
The Gatehouse	Naples
Winterfell Castle	Naples

Site Location Details

General

Name: Winterfell Castle

Address: 6100 Pine Ridge Road

City: Naples

St/Prov: FL Postal: 34109

Telephone: (239) 261-6617 Cellular: () -

Category: Outdoor

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

Tax Schedule: [icon]

Description: Winterfell is the ancestral castle and seat of power of House Stark and is considered to be the capital of the north. It is located in the center of the northernmost province of the Seven Kingdoms, on the kingsroad that runs from Storm's End to the Wall.

Picture



Notes Directions Picture Required Items

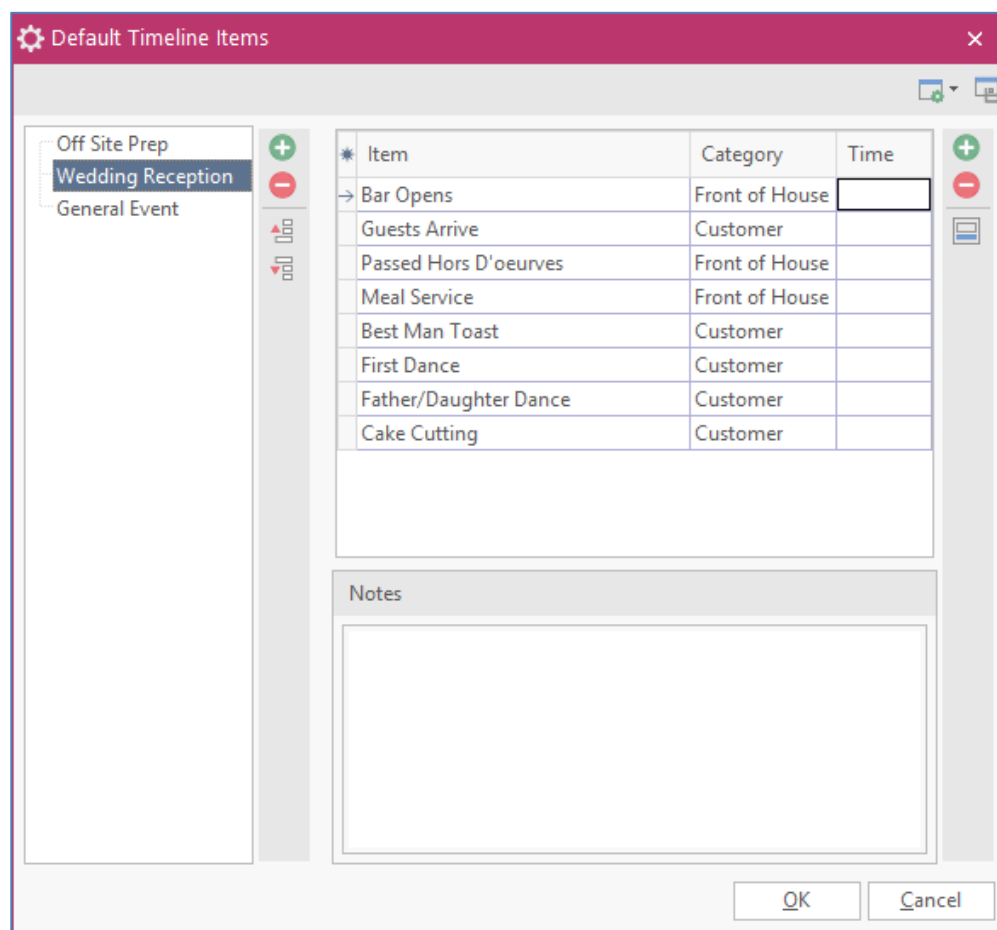
(See http://support.caterease.com/20/helpmenu/Content/Setup/Entering_Site_Locations_into_the_Site_Locations_Database.htm)

Set Up Default Timelines



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**.



* 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

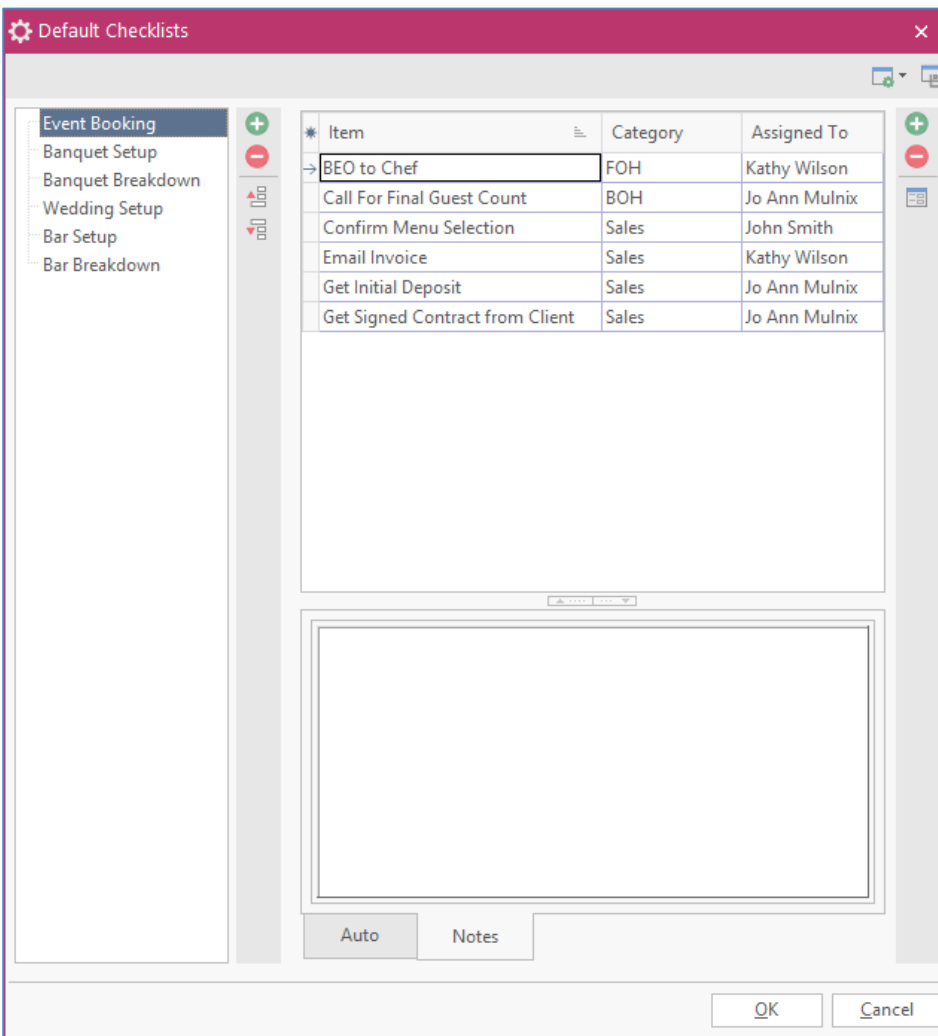
(See <http://support.caterease.com/20/helpmenu/Content/Event Manager/Creating a Detailed Event Timeline.htm>)

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
BEO to Chef	FOH	Kathy Wilson
Call For Final Guest Count	BOH	Jo Ann Mulnix
Confirm Menu Selection	Sales	John Smith
Email Invoice	Sales	Kathy Wilson
Get Initial Deposit	Sales	Jo Ann Mulnix
Get Signed Contract from Client	Sales	Jo Ann Mulnix

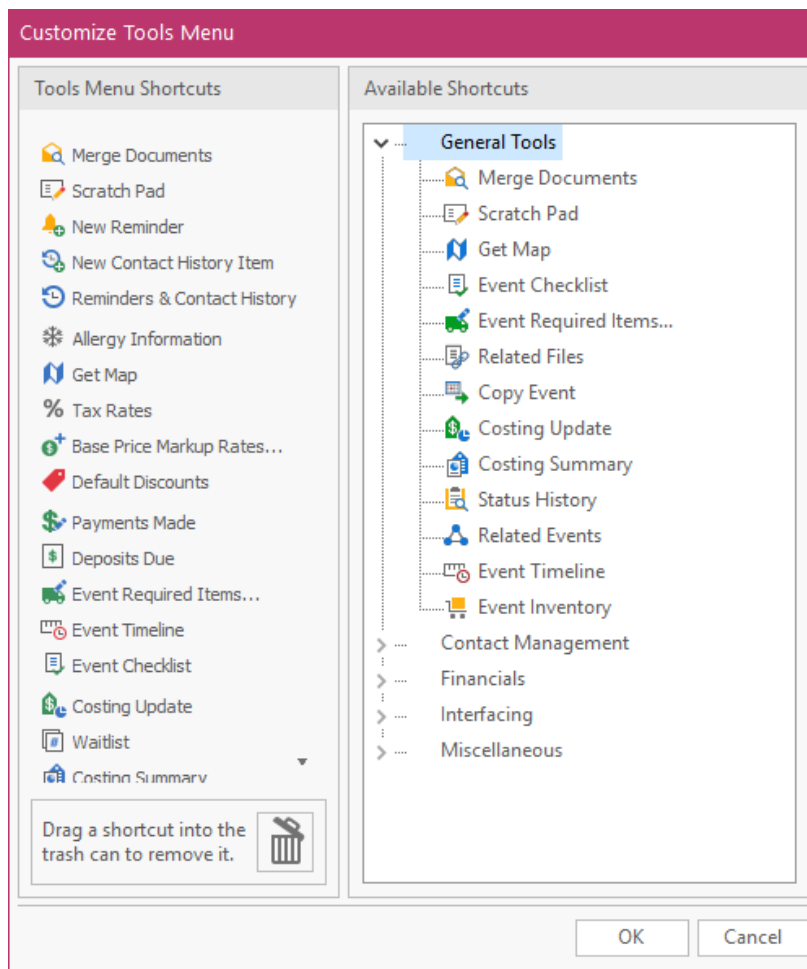
(See http://support.caterease.com/20/helpmenu/Content/Event_Manager/Creating_a_Checklist_of_To-Do_Items.htm)

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**.


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"/>

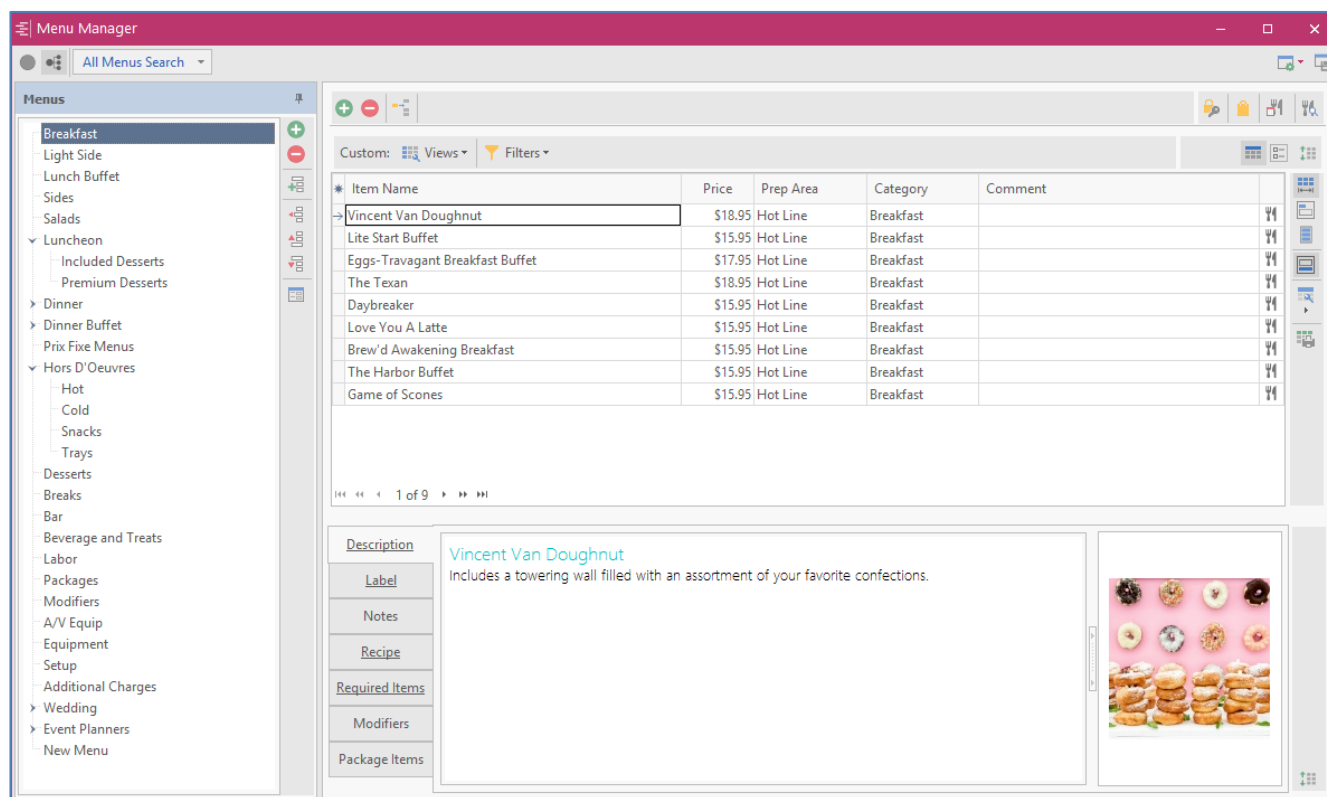
http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Setting%20Up%20Food%20Service%20Item%20Types.htm

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

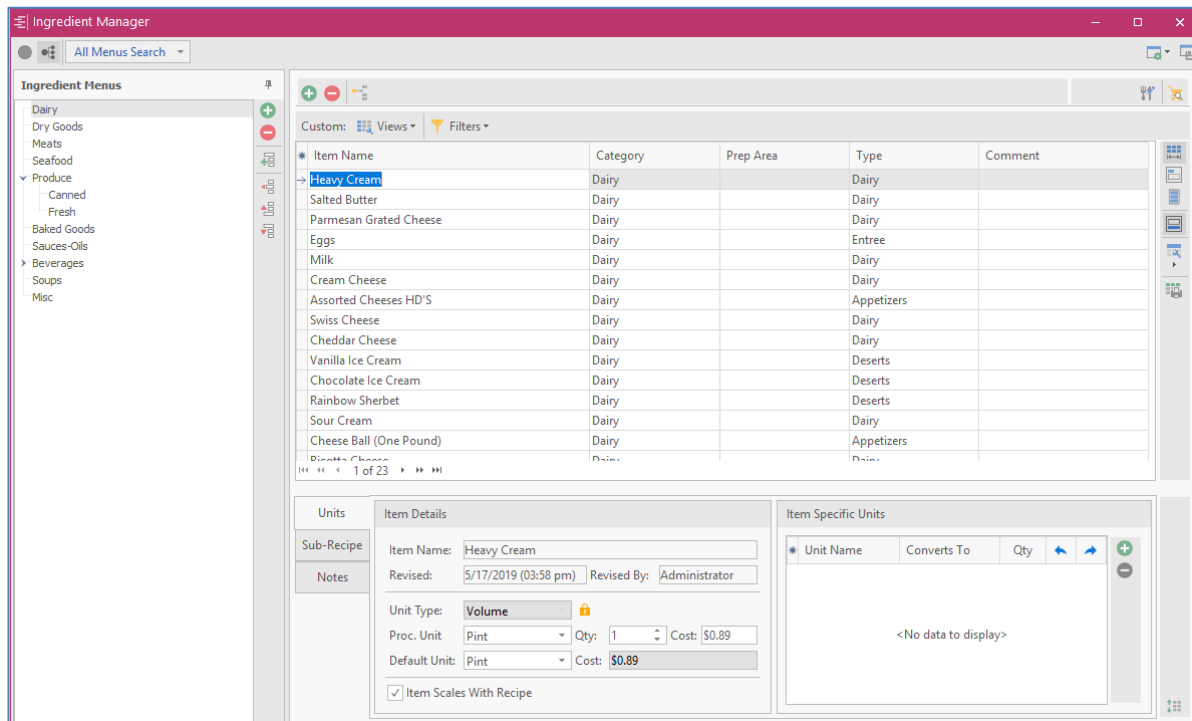
1. Click the **Setup** sidebar.
2. Click the **Ingredient Manager** button.
3. Click the **Add Menu** button , located on the upper left-hand side of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new ingredients list, and press **[Enter]**.
6. Add a new ingredient by 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 (Canned, Fresh), 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 various dairy products like Heavy Cream, Salted Butter, and various cheeses. Below the table are sections for 'Units' (Sub-Recipe, Notes), 'Item Details' (Item Name, Revised date, Unit Type, Proc. Unit, Default Unit, Qty, Cost, and a checkbox for 'Item Scales With Recipe'), and 'Item Specific Units' (Unit Name, Converts To, Qty).

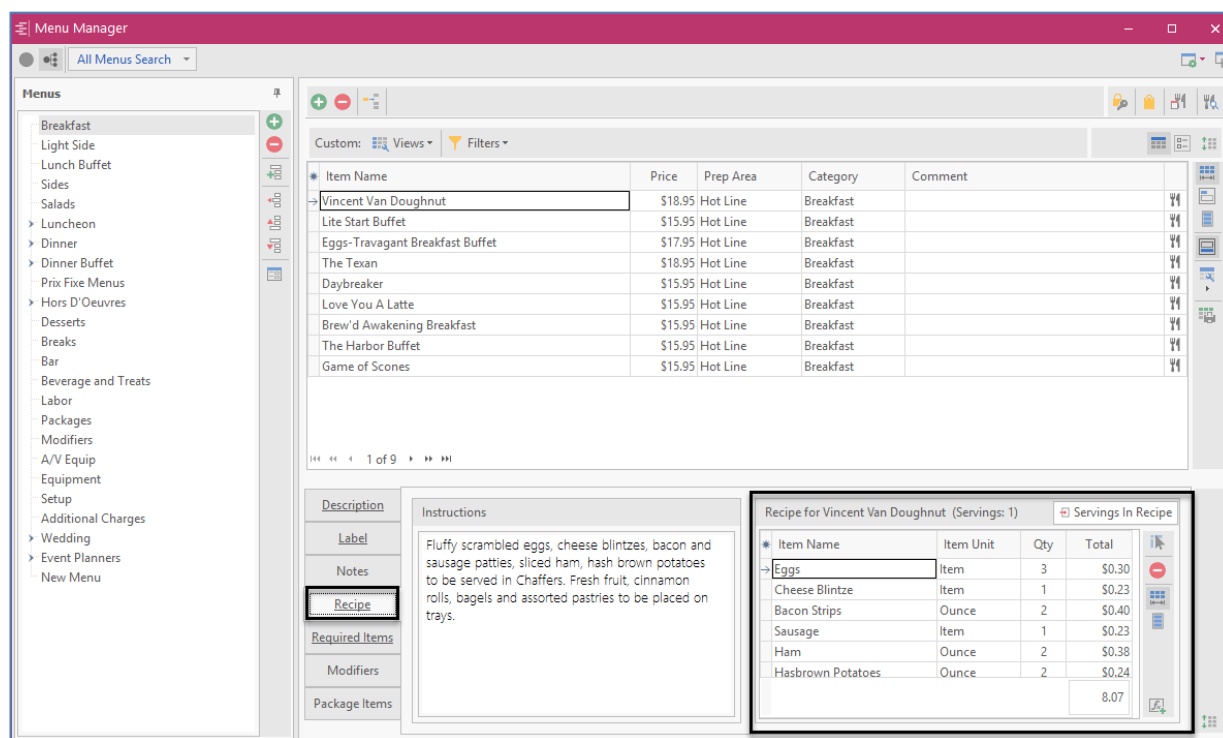
Item Name	Category	Prep Area	Type	Comment
Heavy Cream	Dairy		Dairy	
Salted Butter	Dairy		Dairy	
Parmesan Grated Cheese	Dairy		Dairy	
Eggs	Dairy		Entree	
Milk	Dairy		Dairy	
Cream Cheese	Dairy		Dairy	
Assorted Cheeses HD'S	Dairy		Appetizers	
Swiss Cheese	Dairy		Dairy	
Cheddar Cheese	Dairy		Dairy	
Vanilla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

(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.



The screenshot shows the Menu Manager application window. On the left is a sidebar with a menu tree. The main area displays a list of menu items. The 'Recipe' tab is selected at the bottom. The recipe for 'Vincent Van Doughnut' is shown, including a list of ingredients with their units and quantities.


Item Name	Price	Prep Area	Category	Comment
Vincent Van Doughnut	\$18.95	Hot Line	Breakfast	
Lite Start Buffet	\$15.95	Hot Line	Breakfast	
Eggs-Travagant Breakfast Buffet	\$17.95	Hot Line	Breakfast	
The Texan	\$18.95	Hot Line	Breakfast	
Daybreaker	\$15.95	Hot Line	Breakfast	
Love You A Latte	\$15.95	Hot Line	Breakfast	
Brew'd Awakening Breakfast	\$15.95	Hot Line	Breakfast	
The Harbor Buffet	\$15.95	Hot Line	Breakfast	
Game of Scones	\$15.95	Hot Line	Breakfast	

Recipe for Vincent Van Doughnut (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
			8.07

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

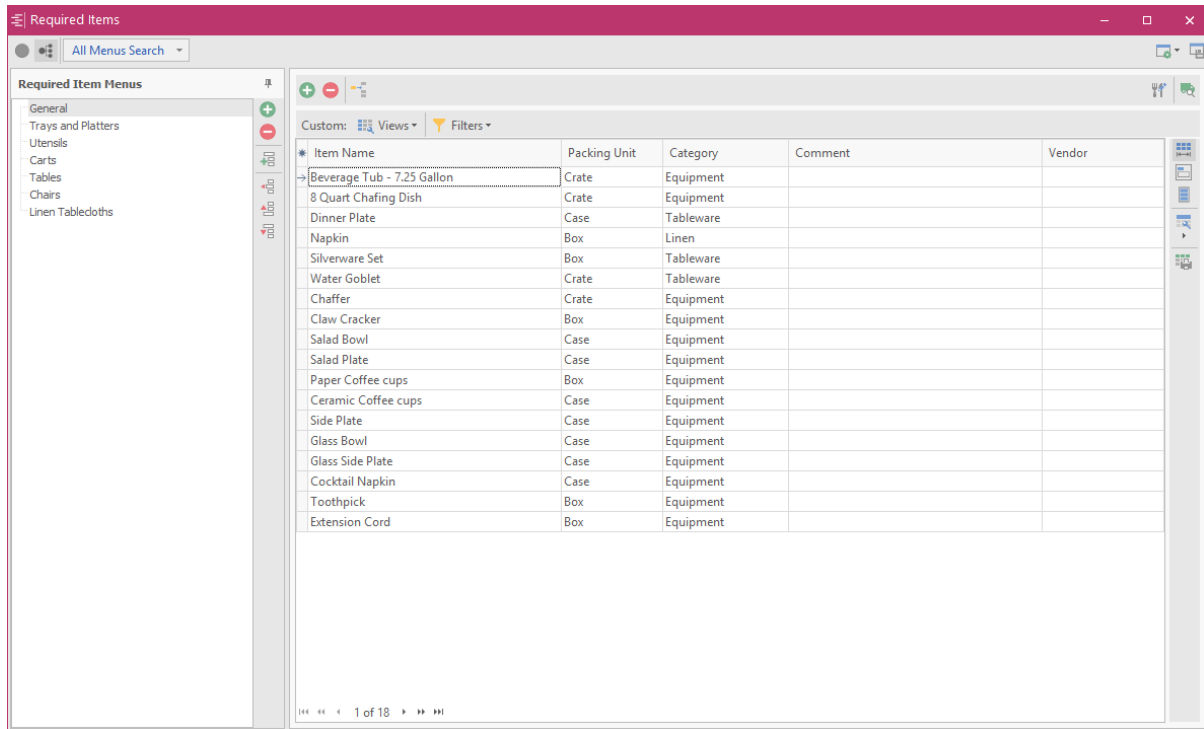
Note: Refer to the *Ingredient Supplement* at the end of this guide for additional details.

Create a Required Items List

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.



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



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. The main area is divided into two panes. The top pane shows a list of menu items with columns for Item Name, Price, Prep Area, Category, and Comment. The bottom pane is titled 'Required Items for Vincent Van Doughnut' and contains a table with columns for Item Name, Item Unit, Category, Comment, Default Qty, and Link. The 'Link' column has checkboxes for each required item.

Item Name	Price	Prep Area	Category	Comment
Vincent Van Doughnut	\$18.95	Hot Line	Breakfast	
Lite Start Buffet	\$15.95	Hot Line	Breakfast	
Eggs-Travagant Breakfast Buffet	\$17.95	Hot Line	Breakfast	
The Texan	\$18.95	Hot Line	Breakfast	
Daybreaker	\$15.95	Hot Line	Breakfast	
Love You A Latte	\$15.95	Hot Line	Breakfast	
Brew'd Awakening Breakfast	\$15.95	Hot Line	Breakfast	
The Harbor Buffet	\$15.95	Hot Line	Breakfast	
Game of Scones	\$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"/>

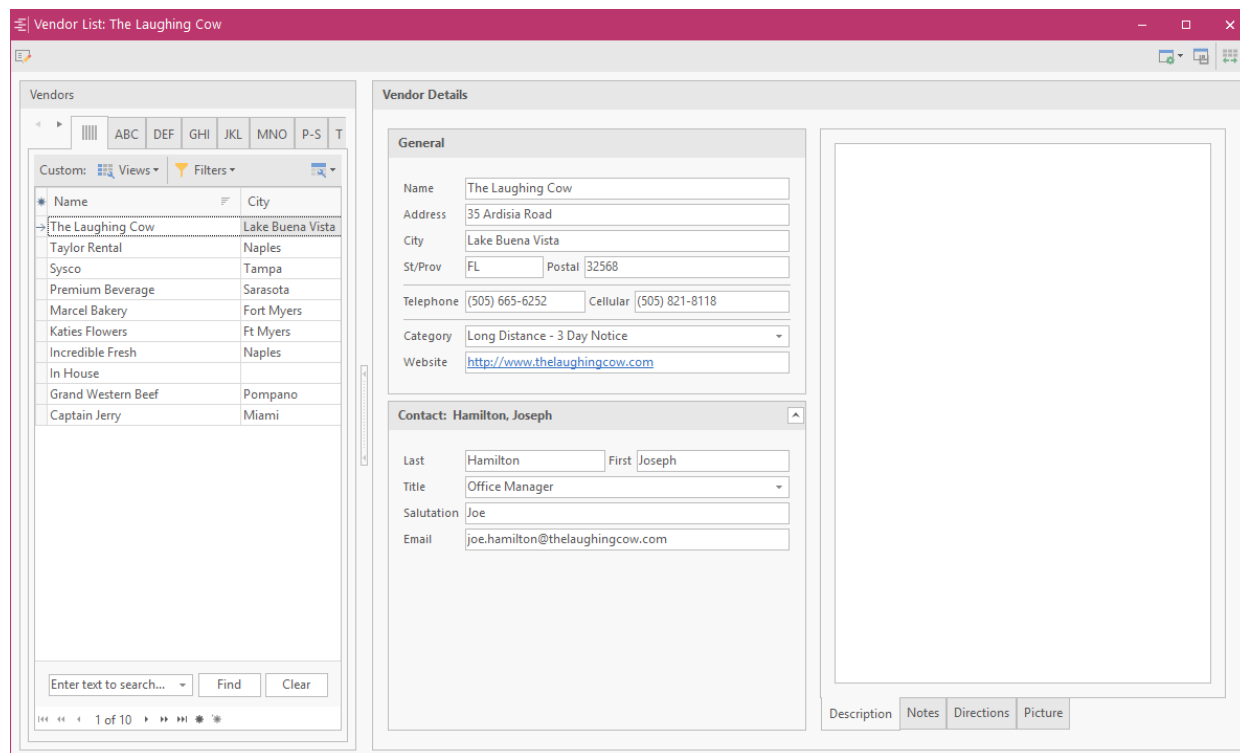
(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Building%20Required%20Items%20Lists.htm)

Add Vendors



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.



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

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

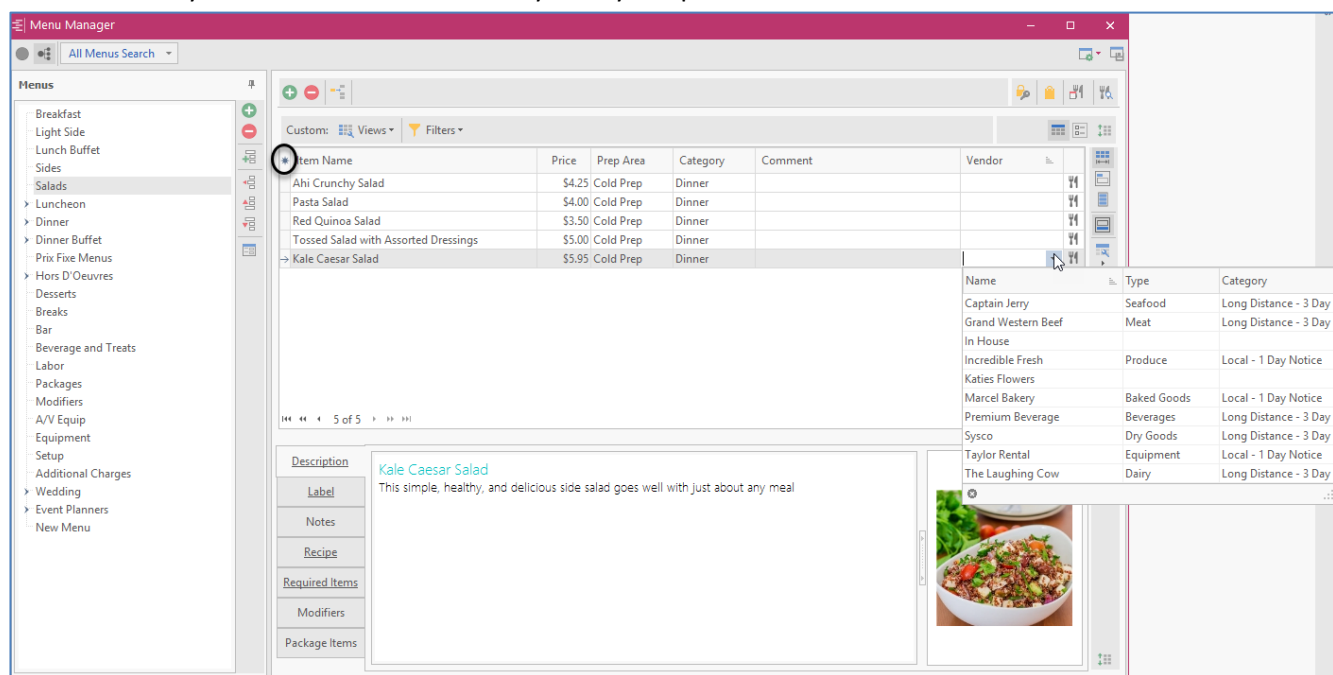
Last: Hamilton First: Joseph
Title: Office Manager
Salutation: Joe
Email: joe.hamilton@thelaughingcow.com

Description Notes Directions Picture

(See http://support.caterease.com/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 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 for yourself or for the other users on your Caterease network every time you open Caterease.



The screenshot shows the Menu Manager application window. On the left, a sidebar lists various menu categories like Breakfast, Lunch Buffet, Sides, Salads, etc. The 'Salads' category is selected. The main pane displays a table of menu items. The 'Kale Caesar Salad' is selected, and a dropdown menu is open, showing a list of vendors. The 'Vendor' column is being customized, and the 'Kale Caesar Salad' item is highlighted in the table.

Item Name	Price	Prep Area	Category	Comment	Vendor
Ahi Crunchy Salad	\$4.25	Cold Prep	Dinner		
Pasta Salad	\$4.00	Cold Prep	Dinner		
Red Quinoa Salad	\$3.50	Cold Prep	Dinner		
Tossed Salad with Assorted Dressings	\$5.00	Cold Prep	Dinner		
Kale Caesar Salad	\$5.95	Cold Prep	Dinner		

Vendor List:

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

Item Details for Kale Caesar Salad:


- Description: This simple, healthy, and delicious side salad goes well with just about any meal
- Label: [Blank]
- Notes: [Blank]
- Recipe: [Blank]
- Required Items: [Blank]
- Modifiers: [Blank]
- Package Items: [Blank]

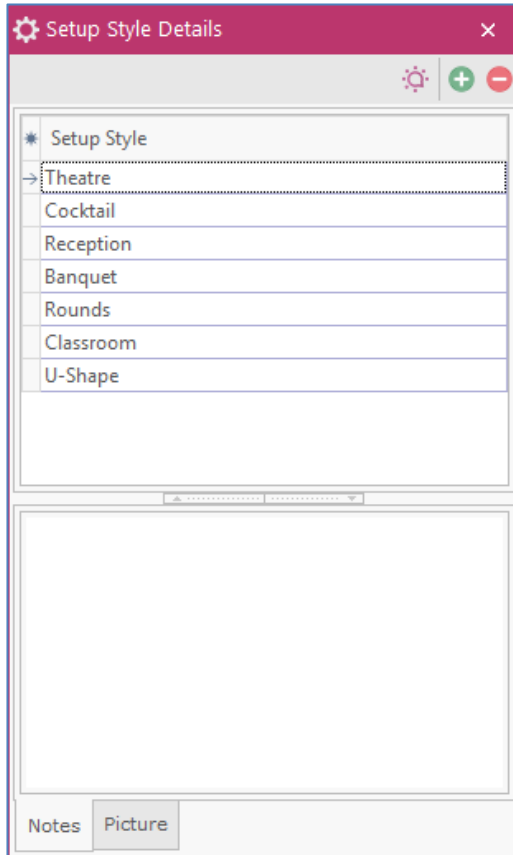
(See http://support.caterease.com/20/helpmenu/Content/Setup/Menu_Manager/Creating%20Default%20Vendor%20Lists.htm)

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**.



The screenshot shows the 'Setup Style Details' window. The title bar is pink with a gear icon and a close button. Below the title bar is a toolbar with a settings icon, a green plus button, and a red minus button. The main area is divided into two sections. The top section is titled 'Setup Style' and contains a list of setup styles: Theatre, Cocktail, Reception, Banquet, Rounds, Classroom, and U-Shape. The 'Theatre' style is selected and highlighted. The bottom section is a large empty text area. At the bottom of the window are two tabs: 'Notes' and 'Picture'.


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

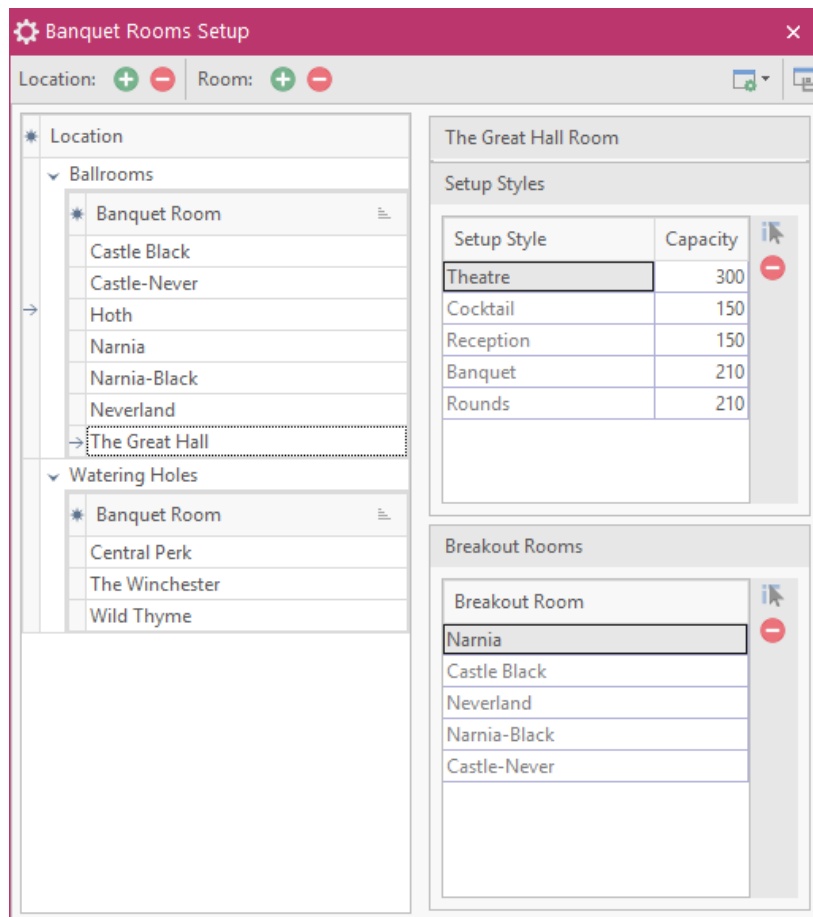
Create Locations to Group Your Rooms (Optional)

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

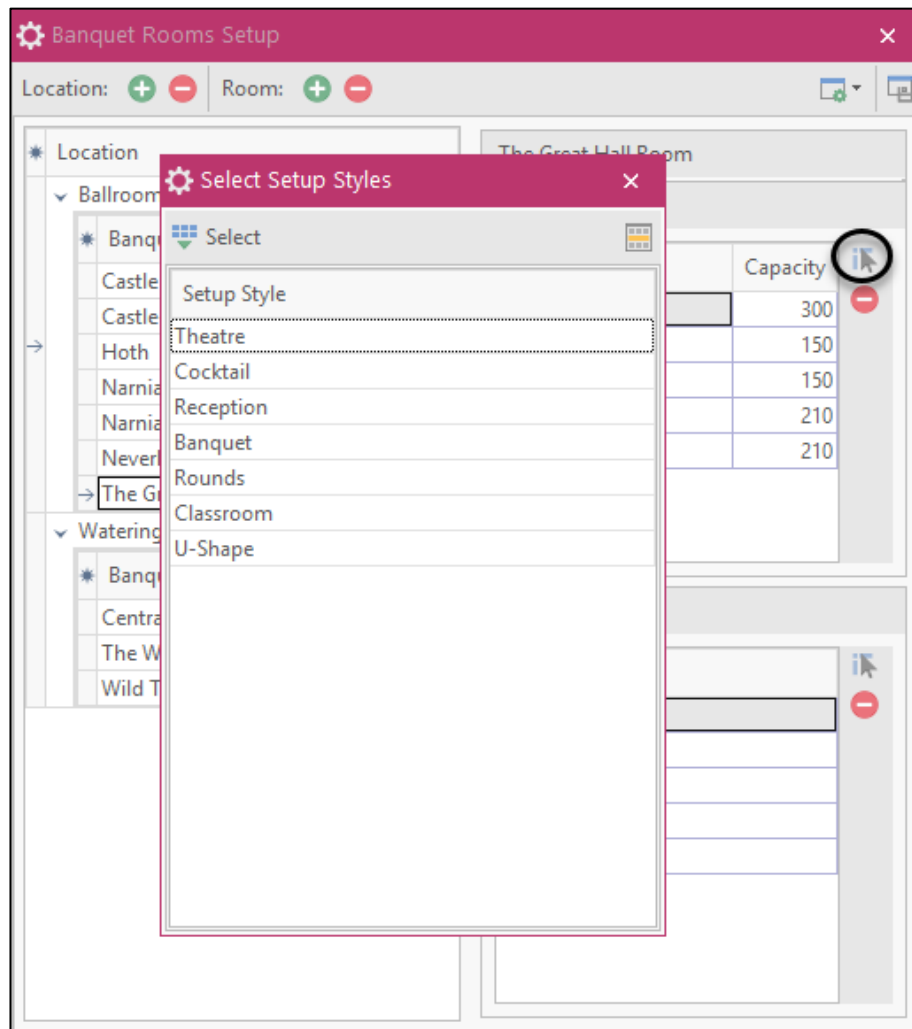
1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. In the left-hand pane of the window, select the location you want to add a new room to.
4. Click the **Add Room** button , located at the top left-hand side of the window.
5. Type a name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

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 Max # 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**.



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.

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

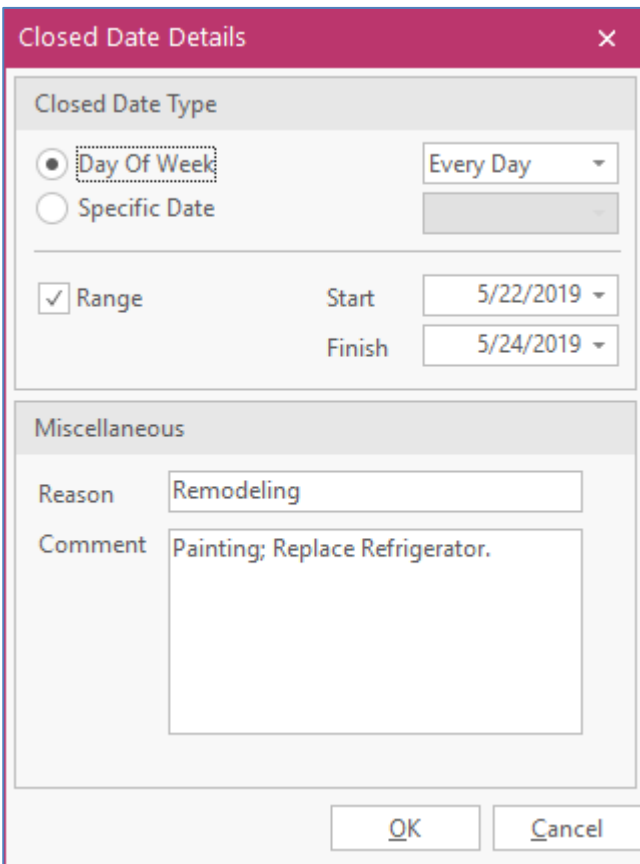
Establish “Closed Dates” for Your Company

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**.



Closed Date Details

Closed Date Type

☒ Day Of Week Every Day

☐ Specific Date

☒ Range

Start 5/22/2019

Finish 5/24/2019

Miscellaneous

Reason Remodeling



Comment Painting; Replace Refrigerator.

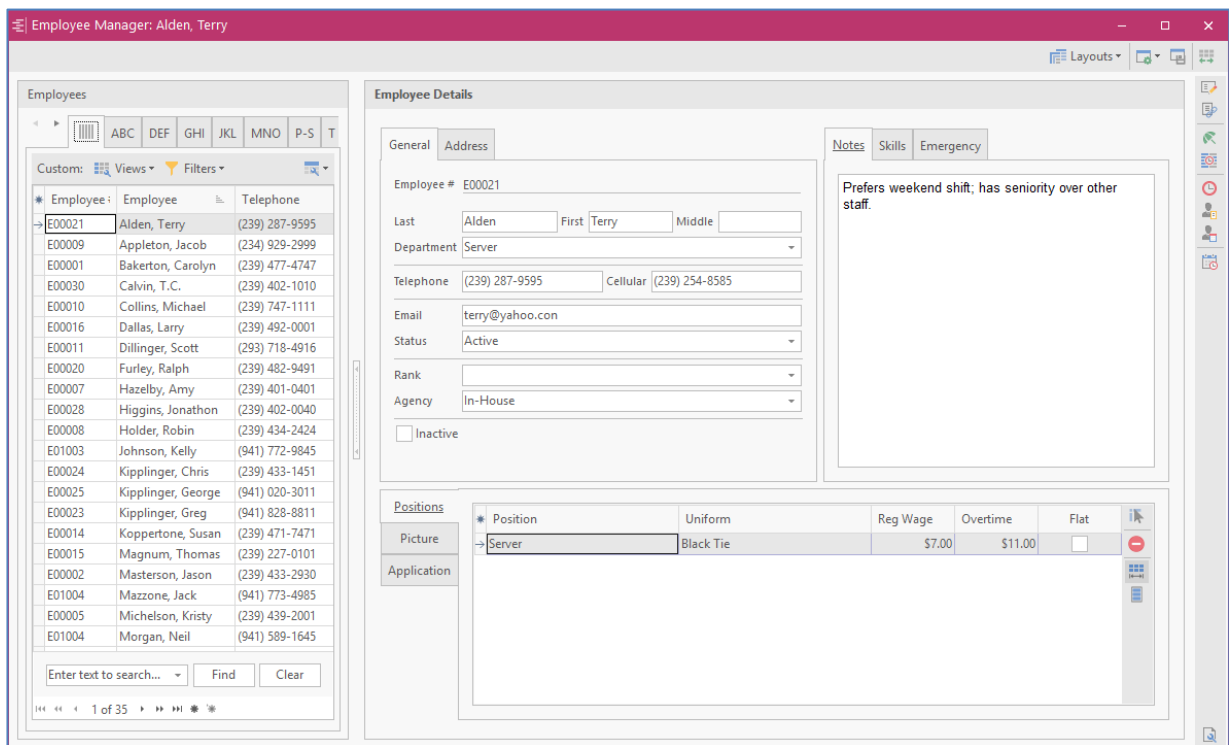
OK Cancel

(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 **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.




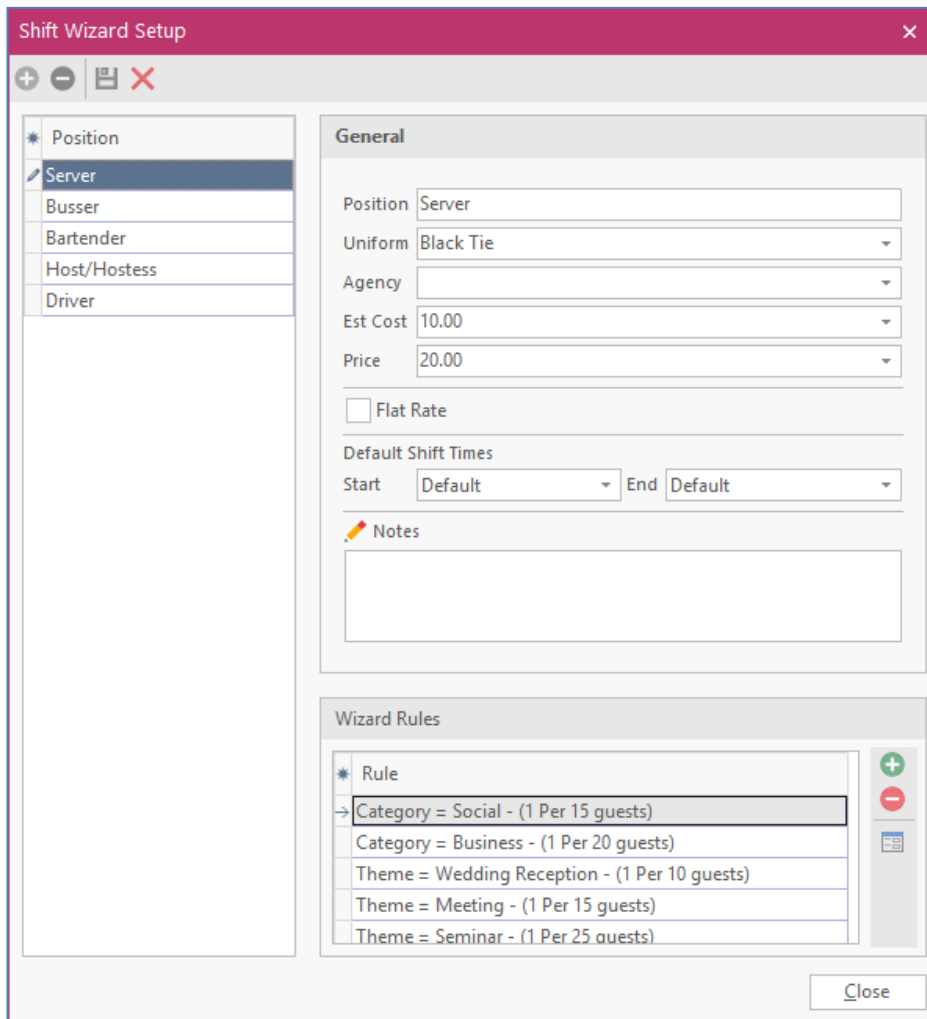
Employee #	Employee	Telephone
E00021	Alden, Terry	(239) 287-9595
E00009	Appleton, Jacob	(234) 929-2999
E00001	Bakerton, Carolyn	(239) 477-4747
E00030	Calvin, T.C.	(239) 402-1010
E00010	Collins, Michael	(239) 747-1111
E00016	Dallas, Larry	(239) 492-0001
E00011	Dillinger, Scott	(293) 718-4916
E00020	Furley, Ralph	(239) 482-9491
E00007	Hazelby, Amy	(239) 401-0401
E00028	Higgins, Jonathon	(239) 402-0040
E00008	Holder, Robin	(239) 434-2424
E01003	Johnson, Kelly	(941) 772-9845
E00024	Kipplinger, Chris	(239) 433-1451
E00025	Kipplinger, George	(941) 020-3011
E00023	Kipplinger, Greg	(941) 828-8811
E00014	Koppertone, Susan	(239) 471-7471
E00015	Magnum, Thomas	(239) 227-0101
E00002	Masterson, Jason	(239) 433-2930
E01004	Mazzone, Jack	(941) 773-4985
E00005	Michelson, Kristy	(239) 439-2001
E01004	Morgan, Neil	(941) 589-1645

Position	Uniform	Reg Wage	Overtime	Flat
Server	Black Tie	\$7.00	\$11.00	<input type="checkbox"/>

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




Add Positions

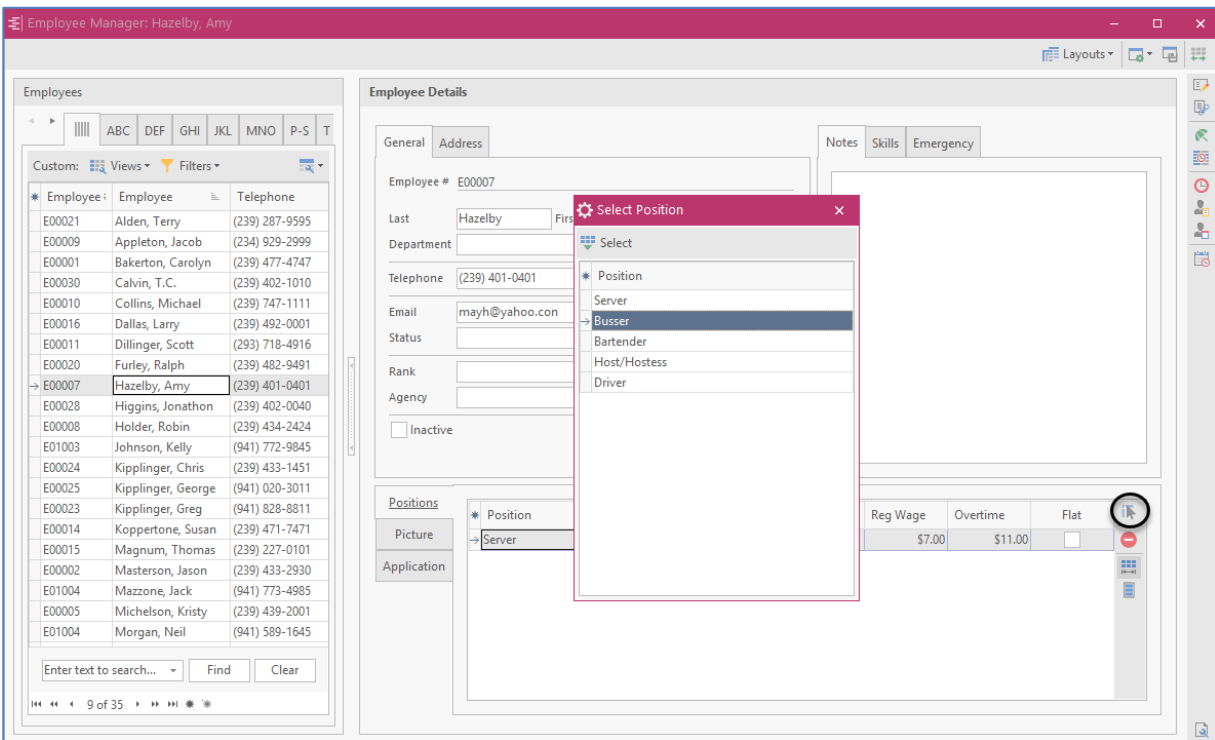
1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Tools** button and select **Shift Setup**.
4. Click the **Add Position** button , located at the top left-hand side of the window.
5. Click **Yes** at the confirmation prompt.
6. Type the name of the position into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



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.

View/Edit Caterease Global Settings

Default Settings

Regional

Fields

Managers

Miscellaneous

Advanced

Conflicts

Data

Event Value

Notifications

Phone Formatting

Phone (###) ###-#### cccccccccc

Fax (###) ###-####

Time Formatting

24 Hour Clock ☐

Metric ☐

OK Cancel

(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

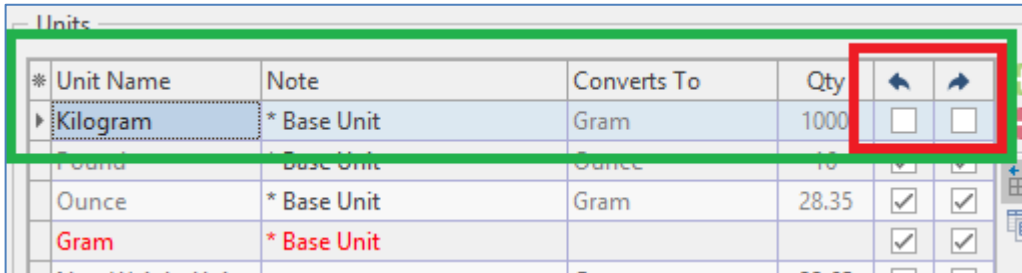
To access the Unit Builder, click the **Administration** ribbon tab > **Lists** > **Unit Builder**.

Unit Name	Note	Converts To	Qty		
Dozen	* Base Unit	Item	12	✓	✓
Pair	* Base Unit	Item	2	✓	✓
Item	* Base Unit			✓	✓

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.



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

Creating Custom Units of Measure for Ingredients with Unit Builder

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.

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.

- **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

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.

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 screenshot displays the 'Ingredient Manager' application window. On the left is a tree view of 'Ingredient Menus' with categories like Dairy, Dry Goods, Meats, Seafood, Produce, Baked Goods, Sauces-Oils, Beverages, Soups, and Misc. The main area shows a table of ingredients. The 'Item Details' pane at the bottom is open for 'Heavy Cream'. It shows the following information:

- Item Name: Heavy Cream
- Revised: 5/17/2019 (03:58 pm) | Revised By: Administrator
- Unit Type: Volume (with a lock icon)
- Proc. Unit: Pint | Qty: 1 | Cost: \$0.89
- Default Unit: Pint | Cost: \$0.00
- ☒ Item Scales With Recipe

To the right of the Item Details pane is the 'Item Specific Units' section, which currently displays '<No data to display>'. The top of the main area shows a table with columns: Item Name, Category, Prep Area, Type, and Comment. The table lists various dairy items like Heavy Cream, Salted Butter, Parmesan Grated Cheese, Eggs, Milk, Cream Cheese, Assorted Cheeses HD'S, Swiss Cheese, Cheddar Cheese, Vanilla Ice Cream, Chocolate Ice Cream, Rainbow Sherbet, Sour Cream, and Cheese Ball (One Pound).

Creating Item-Specific Units

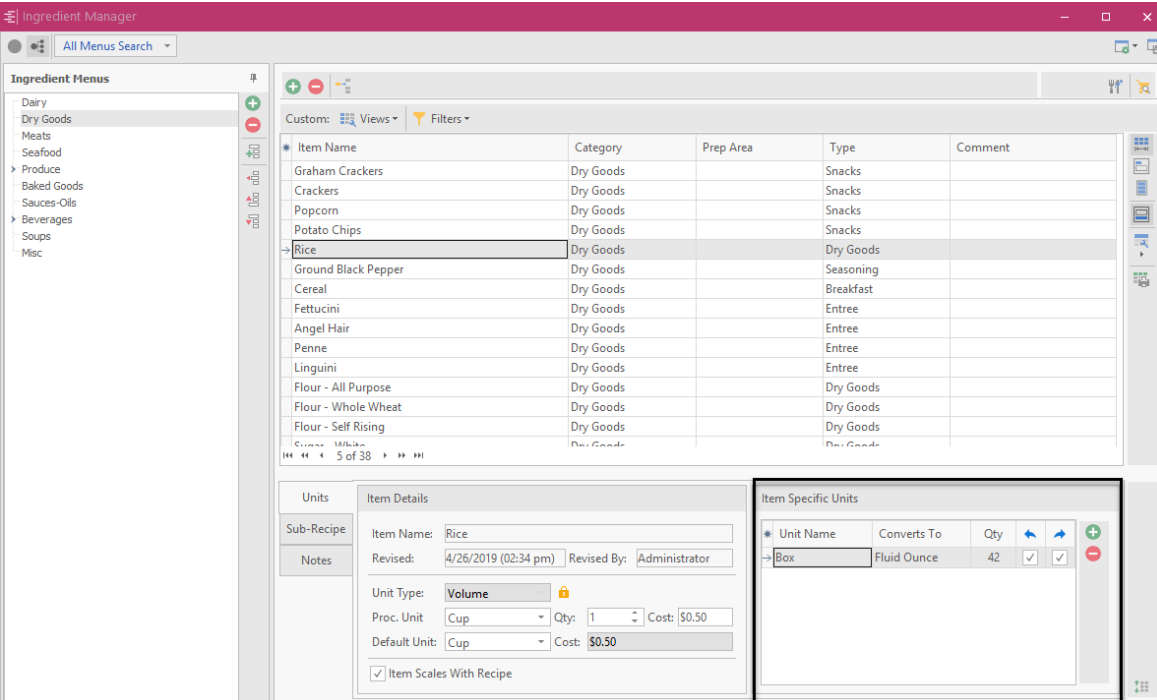
Some units of measure might be unique to specific ingredient items. For example, a "box" is quite different when it measures salt than when it measures cereal or flour. This is where item-specific units come in. You can define specific units that only apply to individual ingredient items.

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 Unit Name field. In the example below, the unit name will be Box.
6. Click the down arrow to the right of the Converts To field and choose an option from the list. In our example, we will choose Ounce.
7. Type the quantity into the Qty. field. For our example, we typed 42, indicating the number of ounces.
8. Ensure the **Convert From** and **Convert To** checkboxes have checks in them.
9. Select the new custom unit, Box, from the Procurement Unit (Proc. Unit) drop-down list.
10. Repeat this process with other items that use the box unit, as desired.

Note: The quantity will change depending on the quantity of the new item. For example, the Qty for a box of raisins might be 30 ounces.



The screenshot shows the 'Ingredient Manager' application 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 list of ingredients. 'Rice' is selected. Below the list, the 'Units' tab is active, showing 'Item Details' for 'Rice'. The 'Unit Type' is 'Volume'. The 'Proc. Unit' is 'Cup' and the 'Cost' is '\$0.50'. The 'Item Specific Units' section is highlighted with a red box. It contains a table with columns: Unit Name, Converts To, Qty, and checkboxes for 'Convert From' and 'Convert To'. A new unit 'Box' is being added, with 'Converts To' set to 'Fluid Ounce' and 'Qty' set to 42. Both checkboxes are checked.

Unit Name	Converts To	Qty	Convert From	Convert To
Box	Fluid Ounce	42	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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).

Ingredient Manager

All Menus Search

Ingredient Menus

- Dairy
- Dry Goods
- Meats
- Seafood
- Produce
 - Baked Goods
 - Sauces/Oils
- Beverages
- Soups
- Misc

Custom: Views Filters

Item Name	Category	Prep Area	Type	Comment
Olive Oil	Sauces/Oils		Oils	
Hollandaise	Sauces/Oils		Entree	
Maple Syrup	Sauces/Oils		Deserts	
Au Jus	Sauces/Oils		Sauce	
Chicken Gravy	Sauces/Oils		Sauce	
Mayonnaise	Sauces/Oils		Dairy	
Cocktail Sauce	Sauces/Oils		Sauce	
Ranch Dressing	Sauces/Oils		Dressings	
Salsa	Sauces/Oils		Sides	
Tomato Ragout	Sauces/Oils		Sauce	
Caesar Dressing	Sauces/Oils		Dressings	
Virgin Olive Oil	Sauces/Oils		Oils	
Lard	Sauces/Oils		Oils	
Hardened Vegetable Oil	Sauces/Oils		Oils	

Units

Sub-Recipe

Notes

Instructions

Prep Time: 5:00
Squeeze ketchup into a bowl. Pour in steak sauce, Worcestershire sauce, and lemon juice. Stir in horseradish, hot pepper sauce, and salt, and mix well.

Recipe for Cocktail Sauce (Makes 1 Ounce)

Ingredient Item Name	Item Unit	Qty
Spicy Ketchup	Fluid Ounce	4.5
Steak Sauce	Teaspoon	0.5
Worcestershire Sauce	Teaspoon	0.5
Lemon Juice Concentrate	Teaspoon	1
Horseradish	Teaspoon	0.5

☒ Auto Calculate Sub-Recipe Cost

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