Description

This guidebook teaches you how to book a new event using the handy Event Wizard tool. Topics covered include:

- Introducing Event Manager
- Accessing the Event Wizard
- Adding a New Client
- Adding Contact People
- Entering Basic Event Details
- Retrieving Menu Items
- Entering General Event Comments
- Adding a Second Sub-Event
- Generating/E-mailing a Print
- Posting a Payment

I. Introducing Event Manager
II. Accessing the Event Wizard

![Image of the Startup Wizard](image1)

**Notes**

![Image of the Tools Sidebar](image2)

**Notes**

![Image of Search for or add client](image3)

**Notes**

*Caterease Software*
III. Adding a New Client

If adding new client, enter new client details.

If adding new client, add Contact Person/People.

Click Next.
IV. Entering Event Details

Enter general event information.

Enter guest counts, times, and room on the SubEvent tab.

Enter site location details on the Site tab.
V. Building an Event’s Menu

Click Yes to select food/service items.

Choose items from menus and drag/drop or double-click.
VI. Entering General Comments

Add custom items with green plus sign or click menu selection tool.

Click the Comments tab at the bottom of the Sub-Event display.

Optionally click the Scratch Pad button to copy commonly used text.
VII. Adding a Second Sub-Event

Click the green plus sign to add additional sub-events.

Generating and Emailing a Print

Click the Prints button from the Home ribbon tab.

If emailing, optionally use custom template or custom merge letter.
VIII. Sharing the Event Through the Portal

Select your custom merge letter.

Right click to load an image.

Share related files.
IX. Posting a Payment

Click the Payments Made button in the toolbar at the right.

Click the green plus sign to add a payment.

Send Portal Link and review/answer chats.
Fill out payment details and click OK.