CATEREASE QUICK GUIDE BOOKING A NEW EVENT



Description

Ι.

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

Introducing Event Manager

- Retrieving Menu Items
- Entering General Event Comments
- Adding a Second Sub-Event
- Generating/E-mailing a Print
- Posting a Payment

| | Boston , MA 33931 | Notes |
|---|--|-------|
| Telephone | (612) 544-8901 | |
| Email | info@drift.com | |
| Event 🛒 S | subEvent | |
| General Misc | Event Manager > | - |
| General Miso Party Name Sales Rep | Cellaneous Event Manager > Hyper Growth 20 Kathy Wilson | |

| | Bostor | 1, MA 33931 | | Notes |
|-------------|--------------------|------------------|--------------|-------|
| Telephone | (612) | 544-8901 | | |
| Email | info@drift.com | | | |
| Event 📑 | SubEvent | | | |
| Description | Lunch Buffe | Event Manager > | | |
| Date | 3/13/2021 (Sat) | Subevent Display | Flour | |
| Start | 11:00 AM | | pkins | |
| End | 02:00 PM | Nanoleaf | Light Panels | |
| Setup Style | Banquet | | | |

II. Accessing the Event Wizard







| Step 1: Select An Accor | unt & Contact Person | | | > |
|-------------------------|----------------------|---------|----------------|------------|
| Search For | æ | | | ۰. |
| Enter text to search | | | | ^ O |
| Client/Organization | E City | St/Prov | Telephone | 7 🔳 |
| Amazon | | | (612) 437-0783 | |
| Apple | Search for or add | | (612) 420-9242 | |
| Aquaman | | | (612) 559-1859 | |
| Boston Red Sox | client. | | (239) 930-4278 | |
| Breaking Bad | | | (612) 486-9636 | |
| Carrie Bradshaw | New York | NY | (612) 208-3060 | |
| Casey Neistat | New York | NY | (612) 741-6658 | T |
| Caterease | Naples | FL | (239) 444-8888 | |
| Coachella | Indio | CA | (612) 540-0234 | |



III. Adding a New Client

| Account Details | 5 | | | × |
|-------------------------------------|----------------|-------------------|----------|---|
| 🔨 Tools • 🛛 🗊 | | | | |
| General | Client/Organiz | ation New Account | | |
| Miscellaneous | Address | | | |
| Notes 💌 | c If ad | ding new client. | Poetal | |
| Allergy | en | ter new client | Postal | |
| Directions | F | details. | <u> </u> | _ |
| Picture | Cellular | () - | | |
| | Email | | | |

| Notes | | |
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| Dwayne 'The Rock' Johnson | Maui | HI | (612) 332-7277 | |
|---------------------------|-------------------|----|----------------|---|
| Ellen DeGeneres | Beverly Hills | CA | (612) 944-2153 | |
| Fabletics | El Segundo | CA | (612) 595-8970 | |
| Forrest & Jenny's Wedding | Greenbow | AL | (612) 541-0444 | * |
| | 4 | | • | - |
| Contacts | | | | |
| Contact | Title | | Phone | - |
| Rose, Maryann | Event Coordinator | r | (239) 261-5828 | ' |
| Click N | Next. | | | Þ |

IV. Entering Event Details

| vent Infor | mation | | |
|------------|---------------------|------------------------------------|----|
| arty Name | Academy of the Arts | Enter general event information. | |
| ales Rep | Kathy Wilson | | * |
| tatus | Tentative | Business Type On-Premise | Ψ. |
| heme | Banquet | Operation Riverside Banquet Center | ٣ |
| ategory | Social | v. | |

| Notes | | |
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| SubEvent Information Site | | Notes |
|---|--|-------|
| Guests Planned Actual Enter guest counts. | Date & Times Date NA Start Serving End Bar | |
| times, and room on the SubEvent tab. | ✓ Setup 01:00 ↔ Tear Down 00:30 ↔ | |

| Notes | | |
|-------|------|--|
| Notes | | |
| Notes | | |
| Notes | | |

| SubEvent Information | Site |
|----------------------------|---|
| Site Information | |
| Name Address | Delivery Time 🗘 |
| Enter site details on t | st/Prov Postal e location the Site tab. |

Caterease Software

| aranteed | Start \$ Serving End \$ Bar | Notes |
|------------|---|--------|
| -Event Inf | ormation | |
| cription | ← Setup 01:00 ‡ | |
| up Style | Tear Down 00:30 🗘 | |
| iquet Roon | n 🖵 🐨 | |
| om Charge | Click OK. | |
| More Help | Previous OK C | Cancel |

V. Building an Event's Menu







| | | | | | _ | Notes | |
|-------------------------|------------|-----|----------|----|-------|-------|--|
| | Price | Qty | Total | 4 | ik | | |
| | \$40.00 | 2 | \$80.00 | 11 | - 0 | | |
| | \$40.00 | 3 | \$120.98 | 11 | 0 | | |
| | | 2 | \$150.00 | ¥1 | | | |
| Add custom ite | ms with | | \$0.00 | ¥1 | | | |
| Swee green plus sign or | click menu | | \$0.00 | ¥1 | | | |
| dles selection to | ool. | | \$0.00 | ¥1 | | | |
| | | | \$0.00 | T | | | |
| | \$25.00 | 1 | \$25.00 | 1 | 10-01 | | |
| | | | | 1 | r 🔳 | | |
| | | [| | | | | |

VI. Entering General Comments





VII. Adding a Second Sub-Event

| 📰 Event 📑 | SubEvent | Notes | |
|---|--|--|--|
| Description Date Start End Setup Style Banquet Room | Dinner Served 3/27/2021 (Sat) 04:00 PM 09:00 PM Banquet Narnia-Black | Click the green plus sign to add additional sub-events. | |
| | | ed Swe | |

Generating and Emailing a Print

| | | | | | | | 0 - |
|-----------|------------|---|---------|------------|--------|-------------|----------|
| Home | Select | Reports | Display | Administra | ation | Help | C Type h |
| ℅ Cut | Roboto Med | lium | ~ 14 | A A | | \sim | 1 |
| り Undo | BĮ⊔ | $\underline{\mathbb{A}} \vee = \mathrm{I}\overline{\mathbb{R}}$ | | 1 1 1 | Prints | Email | Tools |
| board | | Basic Text E | diting | G | Genera | al | |
| lanager × | | | | | Event | Contracts/ | Invoices |
| | Click t | he Prints | button | | D Ir | nvoice | |
| | from t | he Home | ribbon | ent Manag | D Ir | nvoice Deta | ailed |
| lain | | tab. | | anata 5 | | Contract | |
| | | | | ecent• | D P | roposal | |
| Event Mar | ager | | E | vents | D K | (itchen Det | ail |
| Quick Ord | er Manager | | | | | hef's Copy | 1 |



Notes

Event Proposal for Academy of the Arts on Saturday March 27, 2021



VIII. Sharing the Event Through the Portal







| | | \$ Notes |
|---------------------------|------------------|-------------|
| it # Send Portal Link and | Open Portal | |
| R. | Copy Link | |
| | Send Rortal Link | |
| ial Revised 3/13/20 | Portal Chat | |
| ranteed 90 | | |
| Picture | | |
| | | |

IX. Posting a Payment





| Payment De | tails | | × |
|-----------------|-------------|----------------|---|
| General | General | | |
| Credit Card | | | |
| | Date | 3/13/2021 | - |
| | Amount | \$1,000.00 | |
| َ Fill out p | bayment | Credit Card | - |
| details an | d click OK. | | * |
| <u>`</u> | | nitial Deposit | - |

| Notes | | | |
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