# CATEREASE QUICK GUIDE

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# Description

This guidebook teaches you how to use common event-management tools. Topics covered include:

- Searching for an Event
- Customizing Tools Menu
- Creating an Event Timeline
- Creating an Event Checklist
- Copying Events

- Managing Tax/Service Charge Rates
- Scheduling Future Deposits Due
  - Evaluating Cost/Profit
  - Applying Discounts
  - Attaching Files

#### I. Searching for an Event







# Notes

# II. Customizing Tools Menu











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te	Time	Timeline Item Category	jĶ
7/2021	04:00 PM	Cu Retrieve from default list or	0
7/2021	06:45 PM	Aw add custom items with	
7/2021	07:30 AM	En arroan alus siza louse	
7/2021	09:00 PM	Cu green plus sign. House	
7/2021	09:30 PM	Clean Up	-







### **III. Creating an Event Timeline**



# IV. Creating an Event Checklist



Checklist Item	Due	Assigned To	✓ Done On	i
Book Entertainment	3/22/2021	Kathy Wilson		6
Lighting Check				6
Get Signed Contract from Clien	Retrieve fro	m default		-
Get Initial Deposit	list or add cus	stom items		
	with green	olus sign.		
· · · · · · · · · · · · · · · · · · ·				1 12





# V. Copying Events

inistration Help	у туре	nere to searcn	
A 🔾 🗠	-	Sear Event Manager >	>
	Tod	Tools > Copy Event	•
Ta Tools		Merge Documents	
		Scratch Pad	
	₽,	Copy Event	
Manager: Academy of th	e A 👆	New Reminder	
	- S	New Contact Item	
nt ▼   10€ G0 10 ▼   3/15	5	Reminders & Contact History	ssag



Specific Dat	es Optional Parameters Within Range	Notes
Copy The C	current Event To The Follow Specific Dates	
To:	And To:	
And To:	Monday, March 15, 2021	
And To:	▲ March 2021 ►	
And To:	Sun Mon Tue Wed Thu Fri Sat	
And To:		

		Notes
Specific Dates Optional Paramete	9 Optional Parameters >	
Copy The Current Event Using Thes	choose Sequence, day to	
Use The Following Parameters:	begin copy, and number of copies in sequence.	
Sequence: First Weekday	Of Month 👻	
Beginning Date	- Sat - Apr - 2021 🗘	
Number Of Copies: 6		



# VI. Managing Tax/Service Charge Rates







#### VII. Scheduling Future Deposits Due



Image: Solution of the second seco	posits: Academy of the A	rts (E00467)			× Notes
Solution Total \$2,203.85   Paid \$1,000.00   Balance \$1,203.85   Paid \$1,203.85   Pai				<b></b> -	) <del></del>
Pair   Pay Date   Pay Amt     Onday, March 15, 2021   Image: Comment in the	sit \$0.00 -		Total Paid Balance	\$2,203.85 \$1,000.00 \$1,203.85	* 
March 2021 March 2021   March 2021 Image: Click the green plus   9 10 11 12 13   16 17 18 19 20   23 24 25 26 27   20 21 1 2 3	Due Amt	Comment	Paic Pay Date	Pay Amt	0
In Tue Wed Thu Fri Sat Click the green plus   1 2 3 4 5 6   3 9 10 11 12 13 sign to add a deposit.   5 16 17 18 19 20   2 24 25 26 27   2 24 1 2 3	onday, March 15, 2021 March 2021				<b>*</b> 1
	Tue Wed Thu   Fri     2   3   4   5     9   10   11   12     16   17   18   19     2   24   25   26	Sat 6 13 20 27 27	een plus i deposit.		
	2 23 24 25 26 a an at t a	27			



# VIII. Evaluating Cost/Profit





				×	Ν
Event (	Costing Summary >	Cost % Of:	Subtotal Subtotal	1,	
sele	ect parameters	387.78	Cost Profit		
	-19001	0.00	0.00%		
E	Equipment	0.00	0.00%		
l	abor	0.00	0.00%		
F	Room	0.00	0.00%		
	Other	0.00	0.00%		

Notes		





Notes		

## **IX. Applying Discounts**











# X. Attaching Files





Related	Files: E00	)467			×
d	F	File Name	Comment	Shared	0
)21 2:1	0:50 PM	Invoice.pdf	Original Invoice		0
)21 1:0	3:26 PM	Proposal.pdf	Original Proposal		2
			Click green plu to add Related	is sign I Files.	29 113

