CATEREASE QUICK GUIDE

Description

This guidebook teaches you how to set up various default tools in Caterease.

- Customizing Quickpick Lists
- Renaming Fields
- Establishing New-Booking Defaults
- Creating Required Fields
- Creating and Displaying Custom Fields
- Setting up the Scratch Pad
- Limiting Daily Number of Events
- Establishing Security Settings
- Setting up Default Timelines
- Setting up Default Checklists
- Notes Reports Display Administration Help D Type here to sear 3 Prints Settings Options Lists Reminders Database \sim \sim \sim \sim \sim Setup S Quickpicks... 6 ٦ Default Checklists... E. Default Timeline Items... User Defined Fields... Ľò Scheduled Event Items...



I. Customizing Quickpick Lists

II. Renaming Fields

F	le Home	Select	Reports	Display	Administration	Help 🖌)	Notes	
Ger	eeral Menus	Venues	Prints	Settings	Options Lists	Reminde	14		
	Company Inform	mation efaults	S	etup					
<u>ତ</u> ଜ୍ଞ	Required Fields. Food/Service Ite	 em Types		Admir	nistration >				
% 0 [†]	Tax/Service Cha Base Price Mark	arge Rates sup Rates	Ĩ	General N	> Customize James				
₩	Notifications Se Customize Nam	itup							

Customize Names	×
	🖍 Reset Names
√ General	
Client/Organization	Clier Type over existing
Party Name	Party name, then click OK.
Sales Representative	Sales
Coordinator	Coordinator
Reference	Reference
Loyalty #	Loyalty #
Required Items	Required Items

III. Establishing New-Booking Defaults



New Booking Def	aults	X adit the
Accounts	Sta Sta Sa fields an	d checkbox
Contacts	Co op	tions.
Events	Theme Reference	Repeat Client
Employees	Category	Immediate
SubEvents	Pay Method Business Type	Pay at Pickup On-Premise
Prospects	Operation	Riverside Banquet Center
	Default From Account	unt Fields
Quick Order	Party Name From C	client/O
Quantraama	Booking Contact	\checkmark

IV. Creating Required fields



o Required Field	ds		Notes
Accounts	• • •		
Prospects	Condi	equired Fields	
Events	Click desired tab.	General	
Guestrooms	Busir	Event Date	
	Business Type = On-Premi	Party Name	
	Business Type = Wedding	Theme	
	All Events	Category	
		Booking Conta	



Accounts	• •		Notes
Prospects	Conditional Group	Required Fields	
Events	Condition Ensure t	hat "All	
Guestrooms	Business Type Events"	is at the Date	
	Business Type bottom o	f the list. <mark>Name</mark>	
	Business Type	le	
	All Events	Category	
		Booking Contac	
		Site Contact	
		✓ Miscellaneous	

V. Creating Custom Fields









	Name Of Field			Туре		
1	Parking Lot			Text	-	×
2	Contract Return	Date		Date	Ŧ	×
3	NA	•		Text 7	Ŧ	×
4	NA			Text	-	×
5	NA		Y	Text	Ŧ	×
6	NA	Enter User-Defined		Text	*	×
7	NA	Field and select the		Text	Ŧ	×
3	NA	neid type.		Text	Ŧ	×
	NA			Text	*	×

Notes		

VI. Displaying Custom Fields











Notes		

VII. Setting up the Scratch Pad



 Scratch Pad Setup 			Notes
Categories		Scratch Pad Comments	
General Setup Notes Wedding Social Delivery Equipment Common Food Allergies Wedding Notes Account Notes Plating Instructions	cáo litha aða litha 😗 😋	Enter in commonly used text to be pulled into any throughout the program. Click the green plus sign to add a Category. Enter text into Comments area	
Special Comments		text into comments area.	

VIII. Limiting Daily Numbers of Events











IX. Establishing Security Settings

Notes			

Groups & Use	rs			Notes	
Groups	* User Name	Is Sales Re	Sales Rep		
Users	 Administrator 				
R	Kathy Wilson	\checkmark	Kathy Wils(
	John Smith	\checkmark	John Smith		
	Io Ann Mulnix	\checkmark	Jo Ann Mul		
	R		Roxanne M		
	Users tab > double- click on a user				

nterfacing	Jser Name	Administrator
Security F	assword	Assigned
Groups	Accign	password and
A	click the	e Security tab.
Т	Tel	

Notes		

General	✓ General	
ale de sie e	Full Read/Write Access	
Interfacing	v Enable General Access To	
Security	Setup Group	
Croups	Reports	Ξ
Groups	Queries	
	Credit Card Numbers	
	Click into checkboxes	
	e to restrict or allow	
	F access to features.	
	E	

Notes		

X. Setting up Default Timelines







				×
*	Item	Category	Time	0
•	Pull Dry Storage	Back of House	09:00 AM	•
	Load Equipment	Back of House	10:00 AM	
	Equipment Delivery	Rock of House	12:00 PM	
	Completion of Cook 1 Add Tir	neline Items	:00 PM	
Γ	Completion of Main T with gre	en plus sign.	:00 PM	
	Check/Inventory Table		:00 AM	
Γ				

XI. Setting up Default Checklists







				\times
				G • 4
m		Category	Assigned To	70
Signed Contra	act from Client	Sales		
Initial Deposi				
For Final Gu	Add Checklist	t items with		
ail Invoice	green plus	sign and		
O to Chef	optionally	establish		
nfirm Menu S	ueraunt s	ettings.		

Notes		

