Training Guide

Customizing Your Food/Service Items in Menu Manager

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Unit 1: Menu Manager Setup Functions

The Menu Manager is where you go to add or edit food/service menus. Nothing is hard-coded in Menu Manager: Prices, costs, menu items (or even entire menus) can be added, deleted, or easily edited. For those Caterease users who want to get more advanced with their menus, we offer features such as cost, category, item code, digital images, description, ingredients, and required items. You even have the ability to link menu items to the guest count, hide them in prints, set individual markup rates, and track your inventory of reusable items.

Objectives

After completing this unit, you will be able to:

- *Assign a menu item type to a menu item.*
- *Add a new menu in Menu Manager.*
- *Add a sub-menu to a menu.*
- *Add a new menu item to a menu.*
- *Add a price to a menu item.*
- *Use the Quick-Column Customizing button to access menu item details.*

Setting Up Food Service Types

You can establish up to eight food/service item types. Types are used in all financial calculations, and each of these types can be renamed and rearranged to suit your preferences. Your prints and reports reflect the types you establish and the order in which you arrange them.

Setting Up Food Service Types

1. Click the **Administration** ribbon tab at the top of the screen.

2. Click **General** > **Food/Service Item Types**.
   Result: The Food/Service Item Types window opens.

3. To add a new Food/Service Item Type, click into the Type field and type the new name over "NA."
   Note: You can rename an existing field by clicking into the Type field, highlighting the existing name, and typing a new name.

4. Click the down arrow to the right of the Image field and select an image from the drop-down list.
   Note: images that do not display on the window by default are as follows: (Beer); (Wine); (Flowers), and (Delivery).

5. Click into the checkbox under the <u>Active</u> field to activate the new Food/Service Type.
Note: Removing the checkbox from the <u>Active</u> field makes the Food/Service Type inactive, meaning the inactive field will not be an option on the Sub-Event display of Event Manager.

6. Click into the **Associate Charges** area to associate a Room, Labor, Delivery or Misc (Miscellaneous) charge to the Item Type.

7. **[Optional]** To rearrange the order of your Food/Service Types, click into the <u>Type</u> or <u>Image</u> field and hold down your left mouse button. Then simply move the fields up or down into the desired location.
*Note: Click the **Reset** button at the top right-hand side of the screen to restore the default settings.*

Accessing Item Types from Event Manager

1. In Event Manager, access the **Sub-Event** screen.

2. Click the **Settings** button from the **Food/Service** tab and select **Show Item Type Tabs**.
Result: A series of tabs, one for each established item type, displays at the top of the window (although you may change the alignment to bottom, right, or left).

3. **[Optional]** From the All Items view (the default view) click on the <u>Food Items</u> column to view types that have been designated Food.

4. **[Optional]** Click on the other tabs (Beverage Items; Liquor Items; Equipment Items; Labor Items; Room Items; Other Items) to filter each item separately.
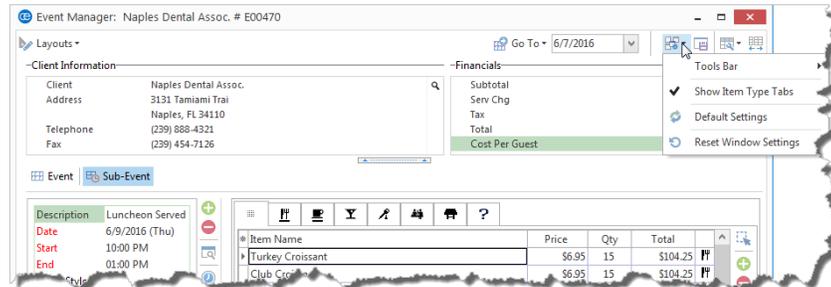
5. Click the **Save Window Settings** button if you would like to retain this new look as your default.

Adding a New Menu

All of your programs default menus - for food and beverage items, rental equipment and even miscellaneous charges such as setup fees, etc. - are managed in Menu Manager. Here you can edit existing menus and create new ones - even organizing items into "sub-menus" for easier access.

Adding a New Menu or Sub-Menu

Tip: If you click the title of a "sub-menu" before adding a new menu in Step 2, the new menu will be added on the same "sub-menu" level. You can also drag and drop menu titles into different positions in the title pane, optionally making them sub-menus of other menus. As you drag, pay attention to your mouse pointer for the indicators described below.

1. Click the **Setup** sidebar on the left-hand side of the screen and click **Menu Manager**.
   Result: The Menu Manager window opens.
   *Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus** > **Menu Manager**.*
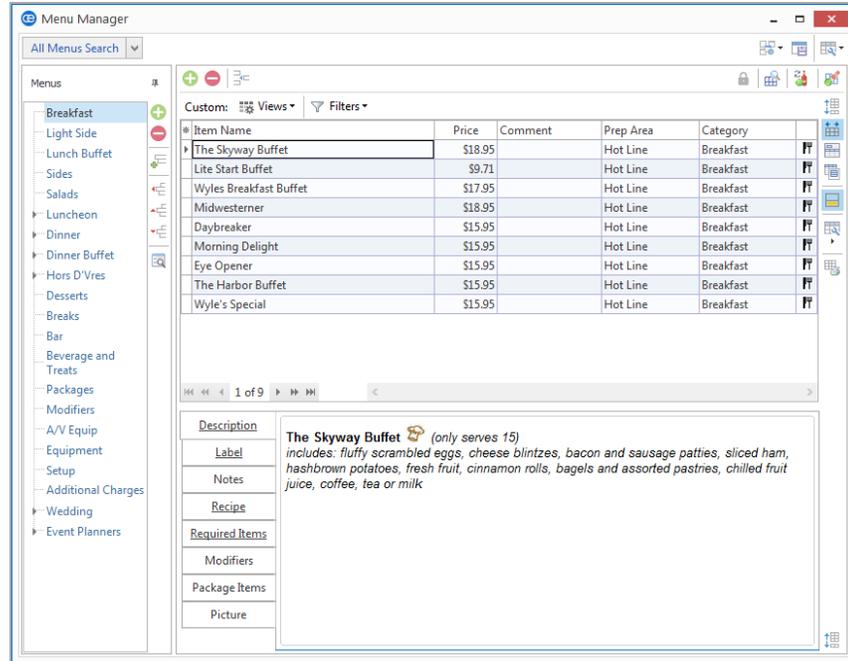
2. Click the **Add New Menu** button ⊕, located along the left pane of the window.
   Result: A new menu is added to your menu list, with your cursor ready to type a new title.
   *Note: This button is identical to the **Add Menu Item** button at the top of the Menu Manager window (as well as the **Add Record** button in the **Home** ribbon tab at the top of the screen); be careful not to confuse them.*

3. Type a name for your new menu, and then press your **[Enter]** key.
   Result: Your new menu name is saved.

4. **[Optional]** Create a sub-menu of another menu by first selecting a title in the left pane of the window and then clicking the **Add Sub-Menu** button 🔲.

5. Add new menus to your new menu as desired.
   Note: It is recommended when adding items to a new menu that you take care to set the first item up with the appropriate "Type,""Category," "Prep Area," etc., because each additional item you create will mirror the first in these settings.

   - **Drop Above** 🔲: Indicates that the menu you are dragging will be dropped above another menu.

   - **Drop Below** 🔲: Indicates that the menu you are dragging will be

dropped below another menu.

- **Drop As Child** ➡: Indicates that the menu you are dragging will become a sub-menu of another menu.

Copying an Existing Menu

Tip: Once you copy a menu, you can drag and drop its title into a different position in the title pane, optionally making it a sub-menu of another menu. As you drag, pay attention to your mouse pointer for the indicators described below.

1. On the left-hand side of the Menu Manager window, right-click the title of the menu you want to copy.
   Result: *A pop-up list of options appears.*

2. Choose **Copy Menu**.
   Result: *A Copy Menu window appears, offering certain options.*

3. Click the checkbox next to options you want to include in the copy, and then click **OK**.
   Result: *A copy of the menu is added to your menu list, with the cursor in the* <u>Title</u> *field, ready for you to type a new title.*
   Note: *Options include the choice to include ingredients or required items for items in the original menu, as well as "sub-items" for any menu package items.*

4. Type a name for the new copy, and then press your **[Enter]** key.

Adding Menu Items to Default Menus

You can add or edit menu items in your program's default menus, including basic details such as name and price, as well as additional information such as cost. You are able to create a detailed item description and a default quantity when an item is ordered in an event. You even have the option to link the quantity of an item to the guest count of a party, or to have an item hidden on certain prints, by default.
Note: You can also copy menu items from one menu to another (in addition to being able to copy entire menus)in Menu Manager.

Adding Items to a Menu or Sub-Menu

*Tip: It is strongly recommended that you establish the item Type, Category, and Prep Area (as desired) appropriately for the first item in a new menu PRIOR to adding additional items. New menu items default this information from the line you have highlighted when you click the **Add Record** button.*

1. Click the **Setup** sidebar on the left-hand side of the screen and click **Menu Manager**.
   Result: *The Menu Manager window opens.*
   Note: *As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus** > **Menu Manager**.*

2. In the left pane of Menu Manager, click the title of the menu or sub-menu you want to add an item to.
   Note: *Click the expand button to the left of a menu title to access its "sub-menus."*

3. Click the **Add Menu Item** button ⊕, located at the top of the Menu Manager window.
   Result: *A new blank line is added to the bottom of this menu.*
   Note: *This button is identical to the **Add New Menu** button near the left pane of your Menu Manager, so take care not to confuse them. You can also use the **Add Record** button ⊕ in the **Home** ribbon tab at the top of the screen.*
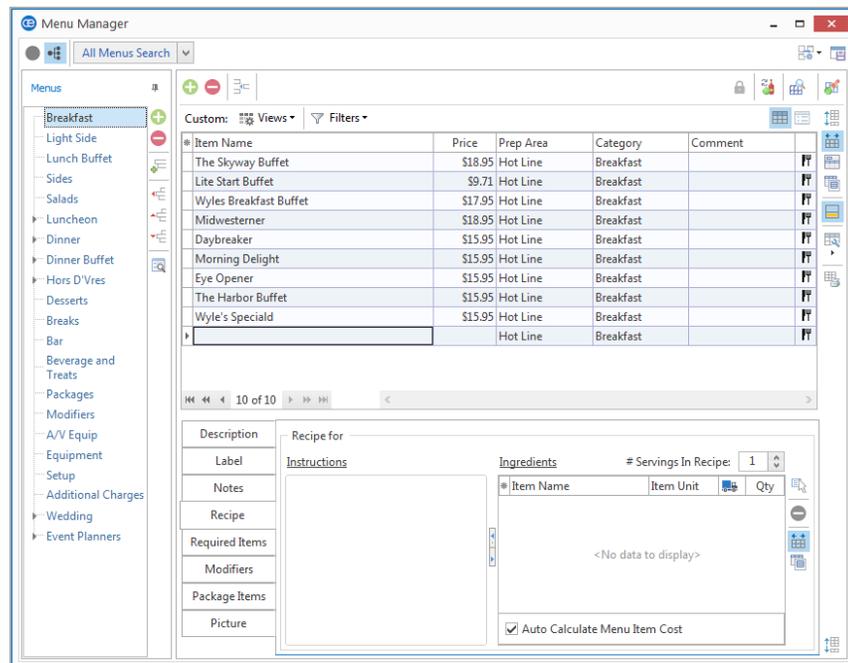
4. Type a Item Name for the new menu item into the field provided.

5. Press your **[Enter]** key.
   Result: *Your cursor is moved one column to the right, most likely to the Price column.*
   Note: *As a default, Menu Manager uses the Name of your new item as its*

Description (see "Creating a Description ...," below). This allows you to include this text on your printed documents with any font formatting you want.

6. Type a Price for the new item, or click the down arrow at the right of this field to get assistance from the drop-down calculator.

7. **[Optional]** Enter a Comment for the item, which can optionally be displayed on your various custom prints and reports.

8. **[Optional]** Enter a Category and/or Prep Area for the item, which can be displayed on your custom prints or used to track your menu items.
Note: Each of these fields offers a custom quickpick list you can control. See tip for important information about default setting for these fields.

9. Click the down arrow next to the Type column (far right column) and choose an appropriate type for the menu item.
Note: Your options, depending upon what you have set up, include Food, Beverage, Liquor, Equipment, Labor, Room, Delivery, Floral, Beer, Wine, or Other.

> **Important:** Each event might have different tax, service charge, or gratuity rates for each type of menu item, so it is extremely important that the appropriate Type be chosen for each item. See tip for important information about default settings for this field.

10. See "Editing Additional Menu Item Details," below, for more information you can customize about this item - including default quantities, linking quantities to an event's guest count, item inventory, and more.

11. **[Optional]** Click in the **Description** tab in Menu Manager and add additional details as desired, using the formatting tools in the **Basic Text Editing** area, located in the**Home** ribbon tab at the top of your screen.
Note: This is a limitless text box, and you can choose whether or not to include this text on your various custom event prints.

Creating a Description, Label, or Notes, or Images for an Item

1. Click into the **Description** text block at the bottom of the Menu Manager window and type as desired.
Note: Descriptions can be included on custom prints in lieu of Item Names to allow for more detail and more flexibility in font formatting. The Item Name of your new menu item will be entered here as a default.
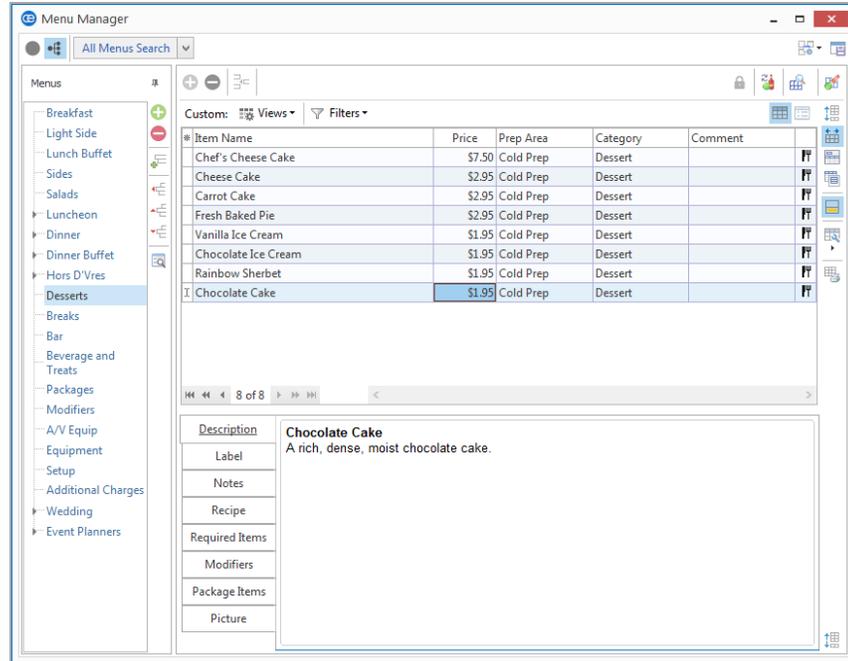
2. **[Optional]** Click the **Recipe**, **Label**, or **Notes** tab and enter text as desired.
   Note: Event Manager offers special prints for both menu item "Recipes" and "Labels" (or place cards for buffet lines); "Notes" can be included on custom event prints.

3. **[Optional]** Use the font formatting tools on the **Home** ribbon tab at the top of the screen to format the text you have entered.

4. **[Optional]** Click the **Picture** tab in Menu Manager. Right-click in the small, empty box at the bottom left of Menu Manager and choose **Load From File** to browse to an image to use for the menu item.
   Note: Images can be included on custom event prints, if desired.

Editing Additional Menu Item Details

1. Click the **Quick Column Customizing** button ⁜, located at the top left of the menu item grid in Menu Manager.
   Result: A drop-down list of optional columns appears.
   Note: See "Fields Available in the Menu Items Grid," below, for a list of available columns for this grid.

2. Click the checkbox next to any column heading to have that column appear in the grid.
   Result: Any columns with checks next to them appear in the grid.

   *Note: The **Automatically Set Column Widths** button ⊞ on the top right-hand side of the Menu Manager window is selected by default, meaning that*

any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.
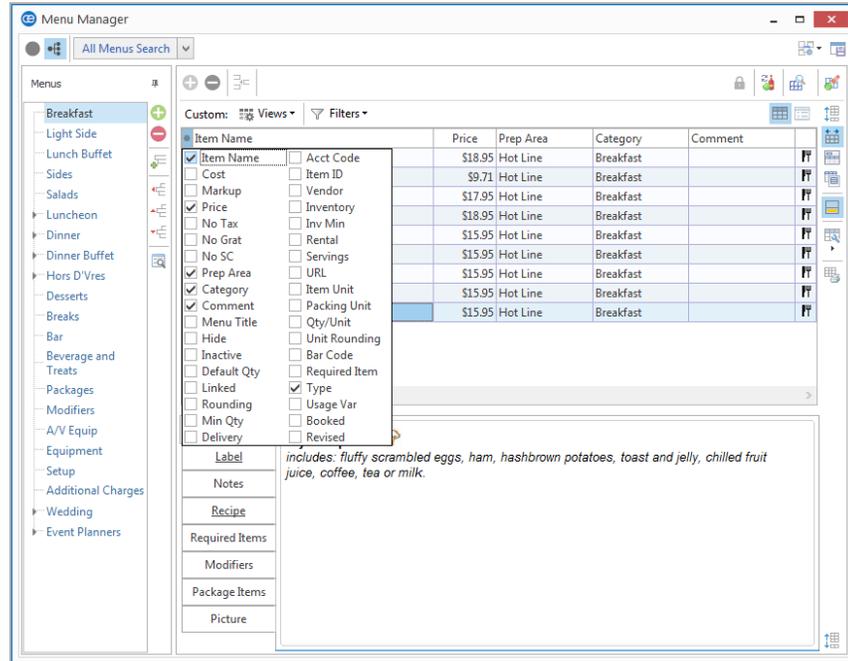
3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
   Note: You can also drag column headings left and right in the grid itself.

4. Enter information into the new fields as described in "Fields Available in the Menu Items Grid," below.

Fields Available in the Menu Items Grid

The following fields are available for display in the menu item grid in Menu Manager:

Field	Description
Item Name*	Identifies the menu item; can be printed on event prints in lieu of or in addition to description (see below).
Cost	Indicates the cost of the menu item; can be directly typed into the field, or can be automatically calculated as a sum of ingredient item costs.
Markup	Multiplies times the item cost (above) to automatically calculate the Price (below); a "10%" markup would be entered as "1.1" (Cost X 1.1 = Price).
Price*	Indicates the price of the menu item.
No Tax	Offers a checkbox to make the menu item non-taxable as a default.
No SC	Offers a checkbox to remove service charge from the menu item as a default.
No Grat	Offers a checkbox to allow you to make this individual item exempt from any gratuity normally assigned to items of this Type.
Prep Area*	Indicates the area or personnel responsible for preparing the menu item; e.g., "Kitchen,", "Bar," "Cold Prep"; can be used for tracking purposes or

Field	Description
	optionally included on prints; event menus are separated based on this field on the Production Sheet event sub-print.
Category*	Allows you to categorize menu items for tracking purposes; offers a customizable quickpick list of options, while "Type" (see below) is a hard-coded field (e.g., items with a Type of "Liquor" can be separated into categories of "Beer,""Wine,""Liquor,"etc.); can be optionally included on custom prints.
Comment*	Allows up to 50 characters of general comment about a menu item; can be optionally included on prints.
Menu Title	Lists the title of the menu the item is located in; helpful when reviewing all items from all menus simultaneously.
Hide	Offers a checkbox allowing you to hide this menu item by default on event prints that are set to allow item hiding; achieves the purpose of "passing notes" to the kitchen or other back-of-house staff.
Inactive	Designates this item as being temporarily inactive; it will appear grayed out here in Menu Manager, and will not be visible at all when selecting items for an event.
Default Qty	Allows you to establish a default quantity for the item when pulled into an event; can be used in conjunction with "Linked" below to calculate a quantity per guest (e.g., a Default Quantity of "3" for each guest attending the event").
Linked	Offers a checkbox allowing you to link the quantity of this menu item to the guest count of an event as a default.
Rounding	Used in conjunction with the two options above to avoid partial quantities; e.g., a pastry with the Default Quantity of "1.5" which is also Linked to the guest count for a party of 25, will default a quantity of "37.5" pastries. In this case you might round it "Up."
Min Qty	Allows you to establish a minimum quantity for an item when it is selected into an event.
Delivery	Offers a checkbox allowing you to designate a menu item as deliverable as a default; items must have this box checked to appear on delivery prints and reports.
Acct Code	Offers a unique identifier for the menu item; used in interfaces with third-party software.
Item ID	Offers a unique identifier for the menu item; used in interfaces with third-party software.
Vendor	Identifies a vendor responsible for providing the menu item.
Inventory	Offers a checkbox for you to designate a menu item as inventoried.
Inv Min	Allows you to establish a minimum quantity for an item in inventory when it is selected into an event.
Rental	Offers a checkbox for you to designate an item (such as AV Equipment, Chairs, Tables, etc.), as rental items.
Servings	Allows you to designate the number of servings for a particular menu item.
URL	Allows you to enter a website address.
Item Unit	Allows you to track a unit of purchase for each item and its associated unit.
Packing Unit	This field relates to Required Items. Allows you to tracking the quantity of the packing unit and its associated unit.
Qty/Unit	This field relates to Required Items/Packing Unit, above. Pertains to how many items (or servings) a packing unit can hold.
Unit Rounding	This field relates to Required Items/Packing Unit, above. Pertains to how you would like the Qty/Unit to be rounded.
Bar Code	You can enter a bar code number into this field. Bar codes can be printed as part of any contract, and will print in classic bar code format. Additionally, bar code labels can be generated from the Food/Service Activity Query.
Required Item	Allows you to designate a food/service item as "required."

Field	Description
Type*	Allows you to categorize items as being "Food,""Bever-age,""Liquor,""Equipment,""Labor,""Room" or "Other"; list is hard-coded; THIS DETAIL IS IMPERATIVE AS IT DETERMINES TAX, SERVICE CHARGE AND GRATUITY RATES FOR INDIVIDUAL ITEMS.
Usage Var	An item's Usage is the number of the particular item that was booked in any active event.
Booked	Allows you to track a day or date range on which a particular menu item was booked.
Revised	Allows you to track a day or date range on which a particular menu item was booked.
User Defined Fields	You can make up your own custom fields pertaining to menu items and dis-play them in this grid as well.
* Displayed on the grid by default.	

Assigning a Prep Area for a New Menu Item

The Prep Area field gives you the powerful ability to generate an event print with separate sections or pages showing the responsibilities for each prep area, depart-ment, or person. For example, if an order has menu items with the Prep Areas of Kitchen, Bar, and Setup, then three sections or pages (one for each of those areas) will be generated when you print the Production Sheet for that order.

Using the Prep Area Feature

1. Access the Menu Manager by clicking the **Menu Manager** button from the **Setup** sidebar on the left-hand side of your screen.

2. On the left-hand side of the Menu Manager, click the title of the menu con-taining the item.

3. Click the menu item on the right-hand side of the screen in which you want to designate a Prep Area.
   *Note: If the <u>Prep Area</u> column is not currently displayed on your screen, retrieve it from your **Quick Column Customizing** tool ⊞ (see the section on Customizing Columns).*

4. In the blank <u>Prep Area</u> field, click the down arrow at the right of the field to select a Prep Area for the menu item from the drop-down quickpick list.
   *Note: Prep Area Quickpicks are added in **Setup** > **Quickpicks** > **Menu Items** > **Prep Area**.*
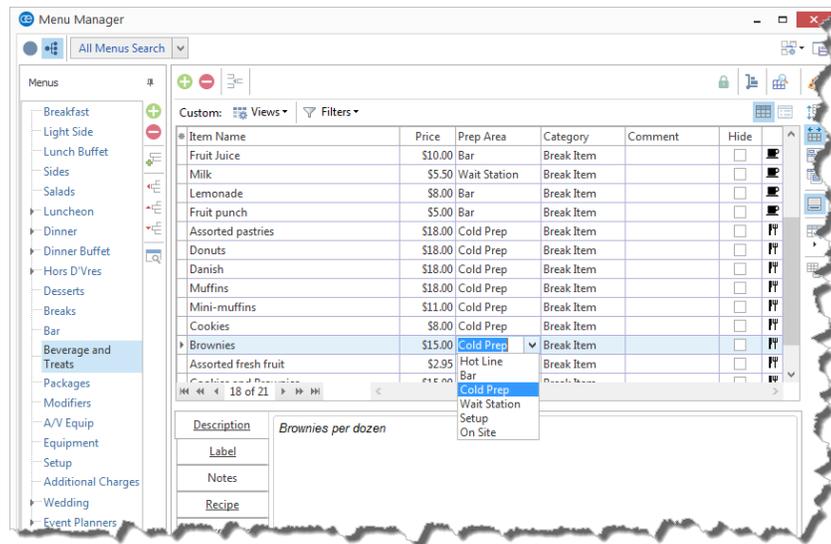
Generating a Production Sheet for an Event Order

The Production Sheet can be printed from the Event Manager to show all menu items for an order grouped by Prep Area. You can choose to have the groups appear together on one page or on separate pages, for easy distribution.

Generating a Production Sheet for an Event Order

1. Access the Event Manager by clicking the **Event Manager** button from the **Main** sidebar on the left-hand side of your screen.

2. Search for and retrieve an event.

3. Click the bottom half of the **Prints** button, located at the top of your Caterease screen.

4. Select **Event Subprints** > **Production Sheet**.
   Note: You may also access this print from the Setup sidebar > Miscellaneous Print Designer > Production Sheet.

5. Click the **Print** button, located at the upper left-hand side of the window.
   Note: You can choose to have the Production Sheet print a separate page for each Prep Area by clicking the New Page For Each Prep Area checkbox in your Miscellaneous Print Designer.
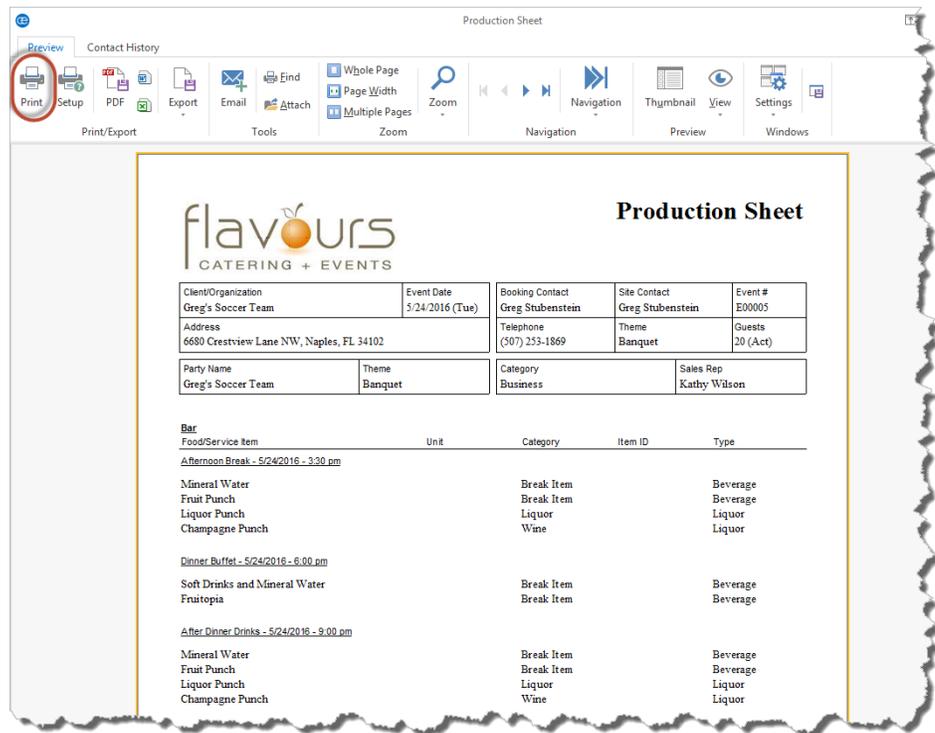
Establishing a Category for a New Menu Item

You can distinguish a menu item from the general item Type by further defining it as a category (for example, you would like to track just your monthly beer and wine sales, instead of all liquor sales).

Establishing a Category for a New Menu Item

1. Access the Menu Manager by clicking the **Menu Manager** button from the **Setup** sidebar on the left-hand side of your screen.

2. On the left-hand side of the Menu Manager, click the title of the menu containing the item you want to categorize.

3. Click the menu item for which you want to select a Category.

4. If the Category column is not currently displayed on your screen, retrieve it from your **Quick Column Customizing** tool .

5. Select a Category from the drop-down quickpick list.
   *Note: Categories can be entered as quickpicks in **Setup** > **Quickpicks** > **Menu Items** > **Category**.*
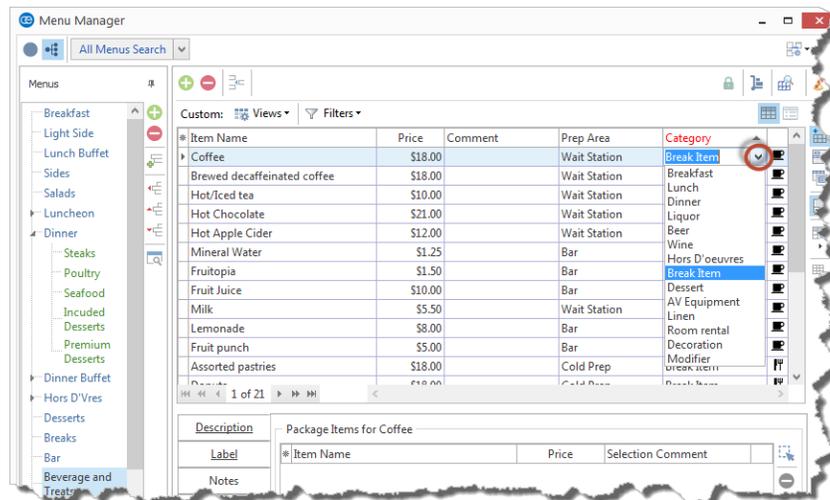
Adding Quickpick Items to the Menu Manager

Throughout your Caterease program there are several drop-down lists, or "quick-picks," to assist you in data entry. These lists exist to save you the tedium of double entry and to keep your data consistent. For example, rather than having to type the menu item Prep Area "Cold Prep" multiple times (and risk accidental misspellings), you can simply select it from your menu item Prep Area quickpick list. These lists are completely under your control; you can edit/modify them at any time. You are able to create quickpick lists for five fields of information in the Menu Manager: Prep Area, Category, Unit, and Comment, and Web Order Group.

Adding a Quickpick Item

1. From the **Setup** sidebar of the main Caterease screen, select **Quickpicks**.
   Result: The Setup Quickpick List screen opens.

2. Click on the **Expand** button next to **Menu Items** to view the corresponding quickpick lists.

   *Note: Click the **Full Expand** button* *if you would like to view all quick-pick categories.*

3. Click one of the following: Prep Area, Category, Unit, Packing Unit, or Comment.

4. Add a new quickpick item to the list by clicking the **Add New Item** button , located on the upper right-hand side of the window.
   Result: A new, blank field appears.

5. Type a name for your new quickpick item.

6. Press **[Enter]**.

7. Repeat steps 4-6 to create the remaining quickpick lists.

8. When finished, click **Close**.
    Note: You can delete a quickpick item by clicking the item to select, then

    *clicking the **Delete Current Item** button* ⊖*, located at the top of the Setup Quickpick Lists form. You can also modify an existing quickpick item by clicking on the item, then typing the name of the new quickpick item. You can rearrange quickpick items in the list by clicking on an item, holding your left mouse button down, and dragging and dropping the item into place.*
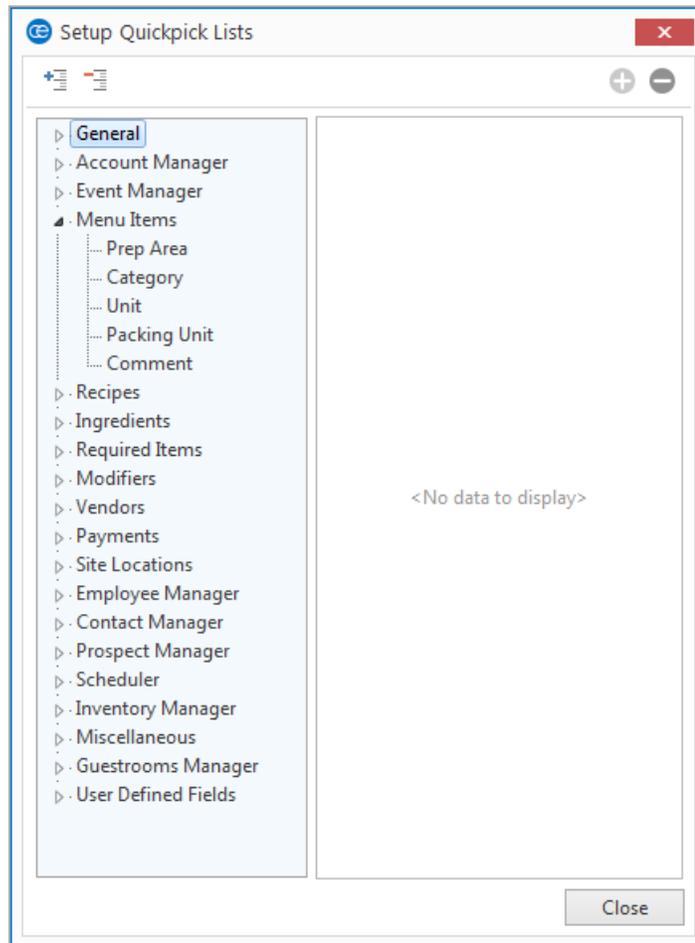
Unit 2: Creating an Ingredients List

You can have Caterease keep track of your menu item ingredients. This is a two-step process. First, you want to establish an overall ingredients list – with every ingredient you use for any item on your menus. Then, you want to retrieve items from this list as ingredients for individual food items. Once you've created your overall ingredients list, you can then link individual ingredients to specific menu items.

When you add a menu item, you can select ingredients from the Ingredients List, assign each ingredient a unit/measure and cost, and the total cost of the item will be automatically computed at the bottom of the Ingredients tab. You can then use the Auto Sum button to transfer this cost to the cost in the menu item display. In addition, you have access to several Event Ingredients print lists (for tracking purposes).

Objectives:

After completing this unit, you will be able to:

- *Create a new Ingredient Menu.*
- *Add ingredient items to the Ingredient Menu.*
- *Print an Ingredients List.*

Adding a New Ingredients List

1. Access the Ingredient Manager by clicking the **Setup** sidebar on the left-hand side of your screen, then clicking **Ingredient Manager**.

2. To add a new Ingredients Menu, click the **Add Menu** button , located on the upper left-hand side of your screen.
   *Note: This button is identical to the **Add Ingredient** button, so take care not to confuse the two.*
   Result: A confirmation prompt appears.

3. Click **Yes** to confirm your choice.
   Result: A new, empty ingredients list is added.

4. Type the name of the new list into the highlighted field.

5. Press **[Enter]** to save your ingredient menu.

6. **[Optional]** Use the Ingredient Menu title panel to modify your list.

   - **Delete List** – Deletes the currently highlighted ingredients list and all of its items.
     Note: This function cannot be undone; you will be prompted to confirm your choice.

- **Add Submenu** – This option adds a new ingredients list as a sub-list of the currently highlighted list.
  *Note: You can also hold your **[Shift]** key down and drag and ingredients list on top of another to make a sub-list.*

- **Move Up One Level** – This moves an ingredients sub-list up one level to make it an independent ingredients list.

- **Move Up** – This moves the highlighted ingredients list up one position in the list.
  Note: You can also drag and drop ingredients lists into new positions.

- **Move Down** – This moves the highlighted ingredients list down one position in the list.

- **Rename Ingredient Menu** (access by right-clicking) – This option lets you rename the currently highlighted list.

- **Expand All** (access by right-clicking) – This option expands your list of ingredients menus to show all sub-lists at all levels.

- **Collapse All** (access by right-clicking) – This option collapses your list so that only lists at the main level (as opposed to submenu) are shown.
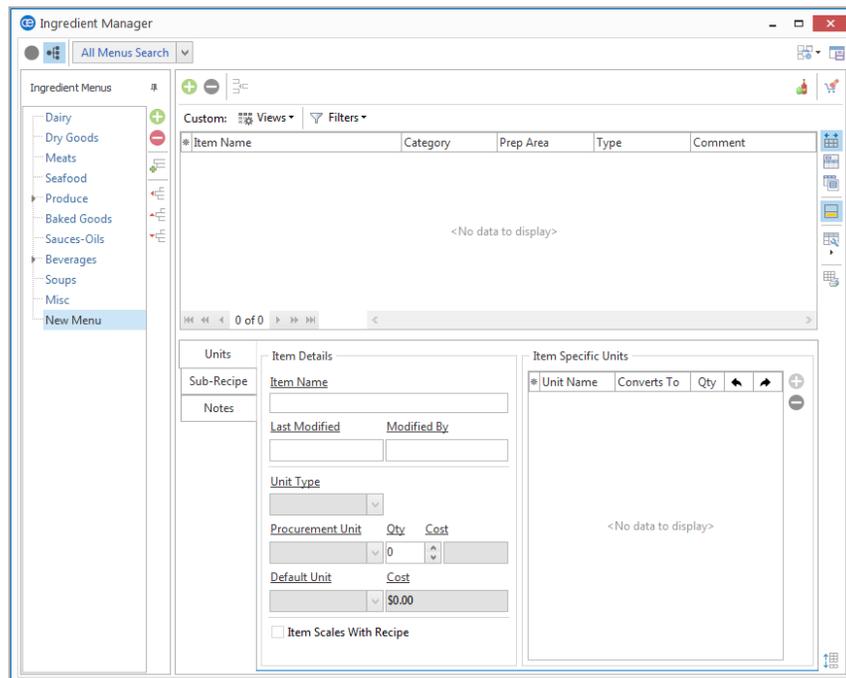
Adding an Ingredient to an Ingredient List

1. To add a new ingredient to a particular list, click the **Add Ingredient** button

[+icon], located at the top of the Ingredients Manager window.

*Note: This button is the same as the **Add List** button, so take care not to con-fuse the two.*

2. Type an Item Name for the new item, and press **[Enter]**.

3. Type the Category of the ingredient (or select from the corresponding drop-down list), then press **[Enter]**.

4. In the Prep Area field, type the preparation area (where the ingredient is pre-pared), then press **[Enter]**.

5. In the Type field, type the ingredient type or select from the corresponding drop-down list, then press **[Enter]**.

6. Type the cost per measure of the ingredient into the Cost field, or use the drop-down arrow located at the right of the field to access a calculator.

7. **[Optional]** Type a comment related to the ingredient into the Comment field.

8. **[Optional]** Click the **Quick Column Customizing** button [icon] to access optional ingredients list fields, such as Title, Vendor, and Item ID.

9. When finished, click the X at the top of the window to save your changes and close the window.

Refer to the table below for a description of the various available fields.

Name	Description
Item Name	This field indicates the name or description of the ingredient item.
Category	This field indicates the category of a particular item. Examples include Dairy, Meat, Baked goods, Seafood, etc. This could be used for tracking purposes, and has a corresponding quickpick list the user can customize.
Prep Area	This field allows the user to indicate where the food was prepared. Examples include Hot Line, Cold Prep, etc. This field has a cor-responding quickpick list the user can customize.
Type	This could be used for tracking purposes. Examples include Dairy, Vegetable, Spice, etc. This field has a corresponding quickpick list the user can customize.
Default Unit	This is the unit this ingredient is purchased in. Examples include ounce, cup, pint, etc. It has a corresponding quickpick list the user can customize.
Comment	Shows any comment you want to associate with the Ingredient.
Title	The field displays the title of the list an ingredient is found in. If a user chooses to view "All Lists" in search of a hard-to-find item, this field lets him know which list to look in next time.
Vendor	This purpose of this field is to select a vendor an item is pur-chased from. It has a corresponding quickpick list the user can customize.
Item ID	This field allows the user to associate a particular item ID, for tracking purposes.

Printing an Ingredients List

The Ingredients List can be printed from the Event Manager to show all menu items for an order grouped by Prep Area. You can choose to have the groups appear together on one page or on separate pages, for easy distribution.

Printing an Ingredients List

1. Access the Event Manager by clicking the **Event Manager** button from the **Main** sidebar on the left-hand side of your screen.

2. Search for and retrieve an event in Event Manager.

3. Click the bottom half of the **Prints** button and select **Subprints**.

4. Select **Ingredients** > **Ingredients List**.
   *Note: You may also access the Ingredients List from **Setup** > **Miscellaneous Print Designer**. Click the expand button to the left of **Ingredients** and then select **Ingredients List**.*

5. Click the **Print** button, located at the upper left-hand side of the window.

Tracking Used Menu Items via the Menu Item Usage Report

This report will list the total quantities of menu items used within a specific day or date range you indicate. This window lets you establish your choices for what you want the report to show. You can choose to have unused items colored. In addition, you can elect to include the event details.

Tracking Used Menu Items via the Menu Item Usage Report

1. Click **Reports** > **Menu Manager** > **Menu Item Usage**.

2. In the pop-up window, select an event **Date Range** by clicking a cor-responding radio button.

   - **Less Than Or Equal To (Specific Date):**
     Click this option to include only items from events on or before the specific date.
     Note: You can type a date into the <u>Date</u> field, or you may click the down arrow and access the drop-down calendar.

   - **Greater Than Or Equal To (Specific Date):**
     Click this option to include only items from events on or after the specific date.
     Note: You can type a date into the <u>Date</u> field, or click the down arrow and access the drop-down calendar.

   - **Within Date Range**
     Click this option to include items from all events within your established date range.
     Note: Establish a date range by typing directly into the <u>Date</u> fields or by clicking the down arrows and accessing the drop-down calendars.

   - **Relative Date Range**
     Click this option to include items from all events within a relative date range.
     *Note: Establish a date range by clicking the down arrows and selecting an option, such as **This Week**, **This Month, Last Week, Last Month**, etc.*

3. **[Optional]** Exclude a particular status by selecting from the **Exclude Status** drop-down list. Options include Prospective, Tentative, Definite, Cancelled, and Closed.

4. **[Optional]** Color Unused Items in the report by clicking the **Color Item If Unused** checkbox in the **Options** section of the pop-up window.

5. **[Optional]** To show the event details for each menu item used, click the **Show Details** checkbox.

6. Click **OK** to generate the report.

Menu Item Usage

Set Parameters

Date Range

○ Less Than Or Equal To   7/1/2015 ∨   thru   7/31/2015 ∨
○ Greater Than Or Equal To
○ Within Date Range
● Relative Date Range | This month | ∨ |

Title

| Menu Item Usage |

Options

Exclude Status

| None selected | ∨ |

☐ Color Item If Unused
☐ Show Details

☐ Close After Printing   OK   Cancel

Unit 3: Using the Menu Manager Tabs

Objectives:

Upon completing this unit, you will be able to:

- *Assign an image to a menu item.*
- *E-mail the image.*
- *Add a required items list to a menu item.*
- *Select a required item from the required items database.*

Including Digital Images of Your Menu Items

You can make your menus come alive by including a digital image of your menu items. You can display them on your screen for your clients to see, e-mail them, or print them and attach them to your contracts.

Assigning Images

1. In your Menu Manager, select the menu items you want to assign an image to.

2. Click the **Picture** tab.

3. Right-click inside the image box. (The box will be empty – blank – if an image has yet to be assigned to this item.)

4. Select **Load From File**.

5. Browse to your image and select it.

6. Click **Open**.
   Note: Alternatively, you may double-click the image to insert it.
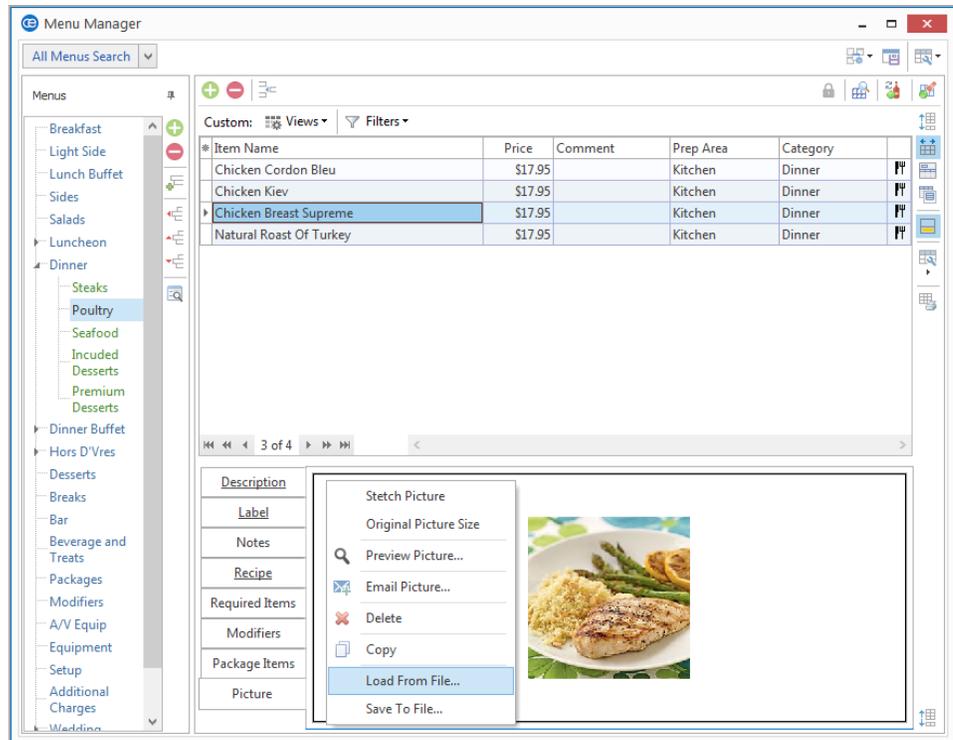
Emailing an Image

*Tip: The ability to e-mail an image is also available in Event Manager. From the **Food/Service** tab in Event Manager, right-click on the image and select **Email Picture**. The image be inserted as an attachment to the e-mail, and the **To** field of the e-mail will auto-populate the event contact's e-mail address.*

1. In your Menu Manager, click on the name of the menu item you would like to e-mail an image of.

2. In the lower left-hand corner of the Menu Manager screen, click your right mouse button in the image box. (The box will be empty – blank – if an image has yet to be assigned to this item.)

3. Select **Email Picture**.
   Result: An e-mail window opens, with the image attached at the bottom of the

window. The e-mail is ready to be addressed and sent.
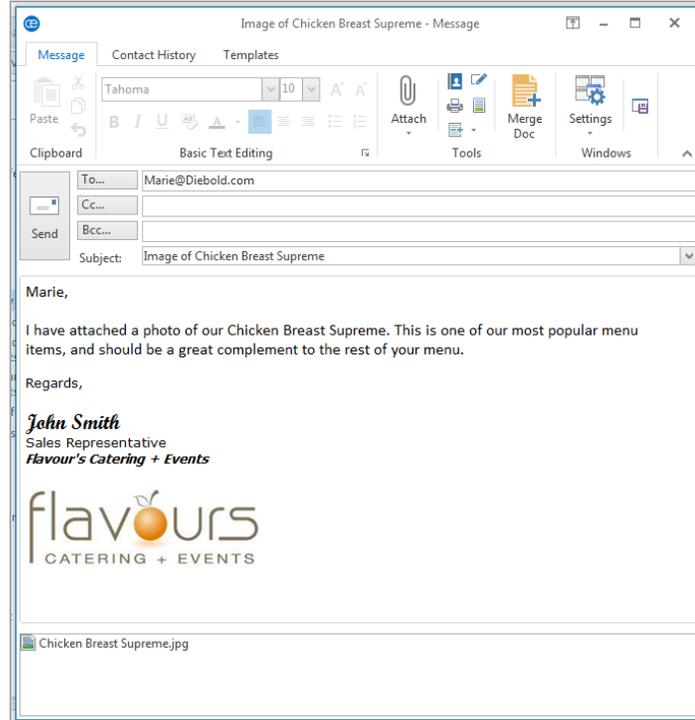
Establishing Menu Item Modifiers

You can assign modifiers to your various menu items, and these modifiers can be optionally retrieved with those items when building a menu for an event. Examples might include the menu item "Caesar Salad" with the optional modifiers of "Chicken" or "Salmon," or a sandwich menu item with modifiers to identify bread or cheese choices, etc. (Modifiers can optionally have additional prices associated with them.)

Adding Modifiers to a Menu Item

1. Click the **Setup** sidebar on the left-hand side of the screen and click **Menu Manager**.
   Result: The Menu Manager window opens.
   *Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus** > **Menu Manager**.*

2. Add modifier items to your default menus , as you would any menu item so they can be selected as "modifiers" in Step 6, below.

Note: "Modifiers" are simply menu items attached to another item, and thus must exist somewhere in your default menus. You might create a separate menu entitled "Modifiers" to store all of these items.

3. In the left-hand pane of Menu Manager, click the title of the menu or sub-menu that contains items you want to edit.
   Note: Click the expand button to the left of a menu title to access its sub-menus.

4. In the main pane of Menu Manager, select the menu item to which you want to add modifiers.

5. Click the **Modifiers** tab.

6. Click the **Select Modifiers** button at the right side of the **Modifiers** tab.
   Result: The Select Menu items window opens.

7. In the left pane of the Select Menu Items window, click title of the menu where your modifier items are stored.
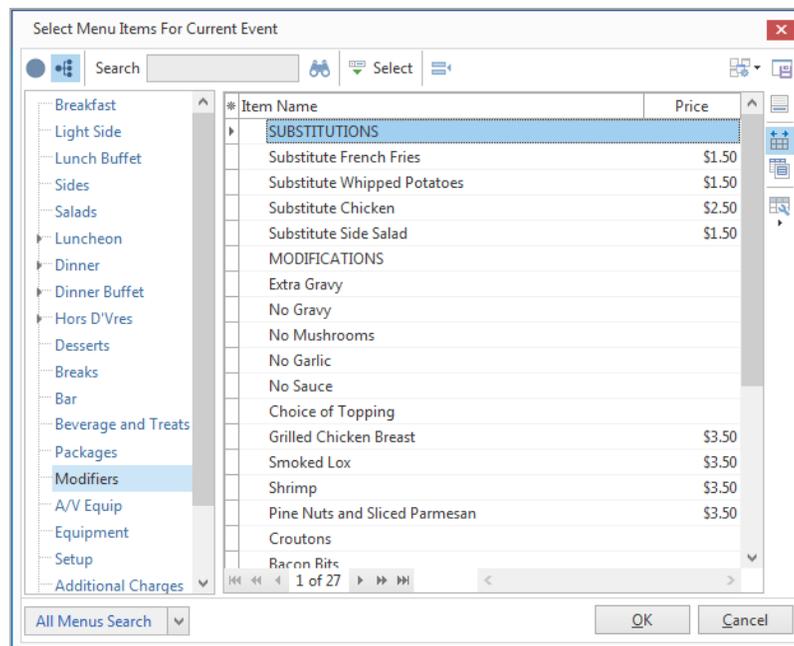
8. Highlight and select items in one of the following ways:
   *Note: All selected items will be inserted at the bottom of the **Modifiers** tab by default, but can be dragged and dropped to any position.*

   - Double-click a single item.
     *Result: That item is inserted in the **Modifiers** tab, and the Select Menu Items window remains open.*

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- Hold your mouse button down on one individual item (without moving) for a half-second and drag that item from the Select Menu Items window onto the **Modifiers** tab.
  *Result: The item is inserted in the **Modifiers** tab.*

- Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them onto the **Modifiers** tab.
  *Result: The items are inserted in the **Modifiers** tab.*

- Click the **Select Items** button at the top left of the Select Menu Items window.
  *Result: Any highlighted items are inserted in the **Modifiers** tab, and the Select Menu Items window remains open.*

- Click **OK**.
  *Result: Any highlighted items are inserted in the **Modifiers** tab, and the Select Menu Items window closes.*

9. **[Optional]** Enter a Selection Comment for your modifiers into the Selection Comment field.
   Note: This comment can be used as a hint when selecting items for an event; examples might include "Choose One," "Per Person," etc.

10. **[Optional]** In the Price field, add or remove a price to be associated with the modifier.
    Note: This price will be retrieved with the modifier when it is selected into an event, and will default to the price applied when the modifier was added to your menus (Step 2, above).

Editing Additional Modifier Item Details

*Tip: If you want the new columns you've selected to be displayed in the Modifiers tab grid as a default, click the **Save Current Window Settings** button at the top right of the Menu Manager window.*

1. Click the **Quick Column Customizing** button, located at the top left of the grid on the **Modifiers** tab.
   Result: A drop-down list of optional columns appears (see table below).

2. Click the checkbox next to any column heading to have that column appear in the grid.
   Result: Any columns with checks next to them appear in the grid.

   *Note: The **Automatically Set Column Widths** button at the right side of the **Modifiers** tab is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll hori-*

zontally.

3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
Note: You can also drag column headings left and right in the grid itself.

4. Enter information into the new fields as described below.

Field	Description
Item Name*	Identifies the modifier item.
Selection Comment*	Can be used as a hint when selecting items for an event; examples might include "Choose One,""Per Person,"etc.
Category	Allows you to designate a modifier category for each modifier. Examples might include "Substitutions," "Vegan," etc.
Cost	Indicates the cost of the item; will default to cost applied to modifier item when it was setup
Markup	Multiplies by the item cost (above) to automatically calculate the Price (below); a "10%" markup would be entered as "1.1" (Cost X 1.1 = Price)
Price*	Indicates the price of the modifier.
Hide	Offers a checkbox allowing you to hide this item by default on event prints that are set to allow item hiding; achieves the purpose of "passing notes" to the kitchen or other back-of-house staff.
Default Qty	Allows you to establish a default quantity for the item when pulled into an event; can be used in conjunction with "Linked" below to calculate a quantity per guest (e.g., a Default Quantity of "3" for each guest attending the event).
Linked	Offers a checkbox allowing you to link the quantity of this item to the guest count of an event as a default.
Rounding	Used in conjunction with the two options above to avoid partial quantities; e.g., a pastry with the Default Quantity of "1.5" which is also Linked to the guest count for a party of 25, will default a quantity of "37.5" pastries. In this case you might round it "Up."
Min Qty	Allows you to establish a minimum quantity for an item when it is selected into an event.
Type*	Allows you to categorize items as being "Food,""Beverage,""Liquor,""Equipment,""Labor,""Room" or "Other"; will default to cost applied to modifier item when it was set up.
* Displayed on the grid by default.	

Adding Required (Packing List) Items to a Menu Item

If a menu item requires certain items - chafing dishes, utensils, napkins, plates, etc. - each time it is served, you can attach a custom list of those "required items" to that menu item. This way, whenever you retrieve that menu item 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.

Note: You must first set up your default list of required items before you can attach them to a menu item as described here.

Adding Required Items to a Menu Item

1. Click the **Setup** sidebar on the left side of the screen and click **Menu Manager**.
   Result: The Menu Manager window opens.
   *Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus** > **Menu Manager**.*

2. In the left-hand pane of Menu Manager, click the title of the menu or sub-menu that contains items you want to edit.
   Note: Click the expand button to the left of a menu title to access its sub-menus.

3. In the main pane of Menu Manager, select the menu item to which you want to add required items.

4. Click the **Required Items** tab.

5. Click the **Select Items** button at the right side of the **Required Items** tab.
   Result: The Select Required Items window opens.
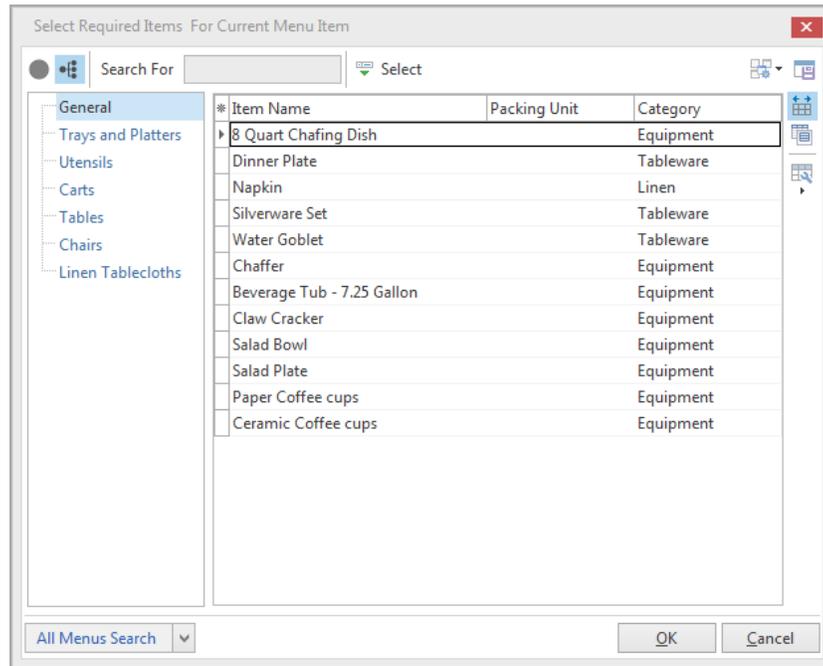
6. Highlight and select items in one of the following ways:
   Note: All selected items will be inserted at the bottom of the Required Items tab by default, but can be dragged and dropped to any position.

   - Double-click a single item.
     *Result: That item is inserted into the **Required Items** area, and the Select Items window remains open.*

   - Hold your mouse button down on one individual item (without moving) for a half-second and drag that item from the Select Items window onto the **Required Items** tab.
     *Result: The item is inserted in the **Required Items** tab.*

   - Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them onto the **Required Items** tab.
     *Result: The items are inserted into the **Required Items** area.*

   - Click the **Drop Items** button at the top left of the Select Items window.
     *Result: Any highlighted items are inserted into the **Required Items** area, and the Select Items window remains open.*

7. Click **OK**.
   *Result: Any highlighted items are inserted in the **Required Items** tab, and the Select Items window closes.*

8. Enter a Default Qty for your modifiers.
Note: This is the default quantity of this item required for each order of this menu item, and will be automatically multiplied times the number of menu items ordered for an event (unless the "Linked" check box is empty, as described below).

9. **[Optional]** Add or remove a check to the **Linked** checkbox, optionally linking the quantity of this item to the number of corresponding menu items ordered in an event.
Note: With this box checked, the Default Qty entered in Step 7, above, will be multiplied times the quantity of this corresponding menu item ordered for an event. With the box empty, the Default Qty entered above will remain the quantity for any event (unless changed in the event itself.

Editing Additional Required Item Details

*Tip: If you want the new columns you've selected to be displayed in the **Required Items** tab grid as a default, click the **Save Current Window Settings** button at the top right of the Menu Manager window.*

1. Click the **Quick Column Customizing** button, located at the top left of the grid on the **Required Items** tab.
Result: A drop-down list of optional columns appears (see table below).

2. Click the checkbox next to any column heading to have that column appear in the grid.
Result: Any columns with checks next to them appear in the grid.

*Note: The **Automatically Set Column Widths** button at the right-hand side of the **Required Items** tab is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.*
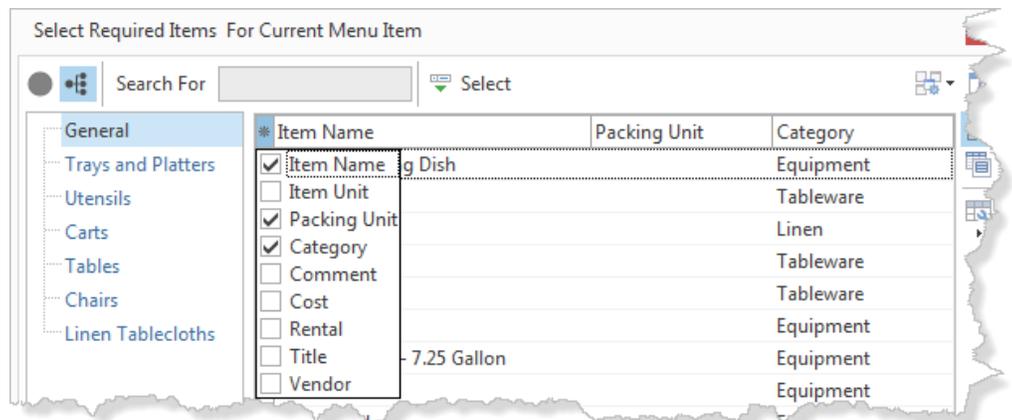
3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
Note: You can also drag column headings left and right in the grid itself.

4. Enter information into the new fields as described below.

Field	Description
Item Name*	Identifies the required item.
Item Unit*	Identifies the unit of purchase for the required item.
Packing Unit	
Category*	Allows you to categorize required items for tracking purposes; offers a customizable quickpick list of options.
Comment	Offers a space for an additional comment about the required item.
Cost	
Rental	
Title	
Vendor	Identifies a vendor responsible for providing the required item.

* Displayed on the grid by default.

Printing a Required Items List

You can print a Required Items List (Packing List) with specific grouping details, such as Category, Vendor, etc.

Printing a Required Items List

1. Access the Event Manager by clicking the **Main** sidebar item from the left-hand side of your screen, then clicking the **Event Manager** button.

2. Use the Search tools to find an existing event for which you want to print a required items list.

3. Click the bottom half of the **Prints** button at the top of the Caterease screen.

4. Select **Event Subprints** > **Ingredients** > **Required Items List**.
   Note: You are also able to access this print by clicking ***Setup*** *>* ***Miscellaneous Print Designer*** *> and clicking* ***Required Items***.

5. Click the **Print** button.

6. **[Optional]** Click the **Email** button to e-mail a copy of the print.

Tracking Required Items Usage

The Required Items Manager not only allows you to create custom lists of required items, but it also offers a handy Required Items Activity tool that tracks the usage of those items.

Tracking Required Items Activity

1. Click the **Setup** sidebar on the left-hand side of the screen and choose **Required Items**.
   Result: The Required Items window opens.
   *Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus > Required Items**.*
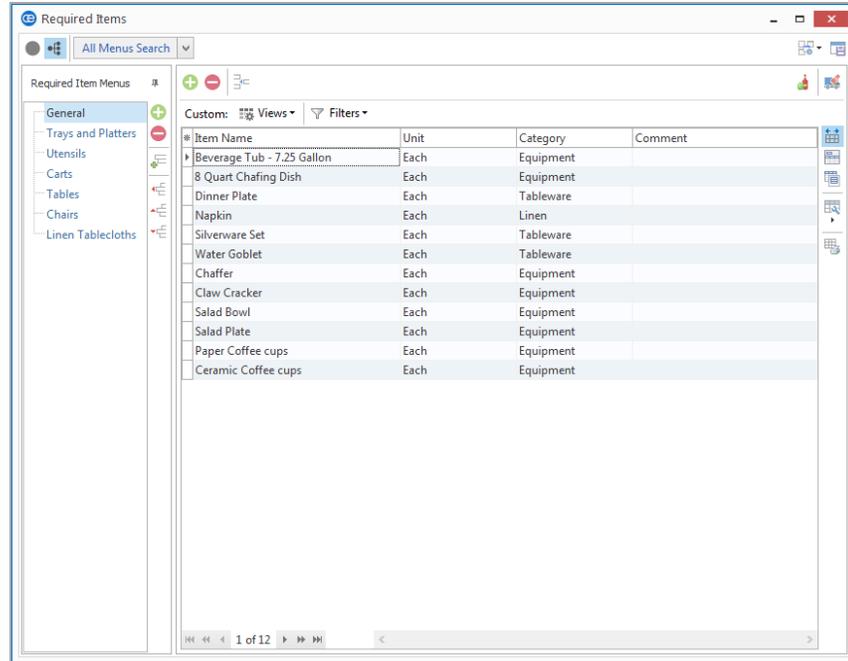
2. Click a title in the left pane of the window to find the item or items you want

    to track, or click the All Menus button , located on the upper left-hand side of the window, to track items from multiple lists.

3. Click one or several items in the list to select them.
    *Note: To select more than one item, hold your **[Ctrl]** key down as you click on them. Hold your **[Shift]** key down to select multiple, contiguous items. Click **[Ctrl] [A]** to select all records.*

4. Click the **Required Items Activity Query** button at the top right of the window.
    Result: *The Required Items For Selected Items window opens, showing a grid listing usage of the currently selected items.*

5. Customize the grid (sort, group, filter, export or print data) as described previously.

Creating an Automatic Menu Item Package

If you have menu items you often sell together, you can combine them into a menu "package." This way, you simply select the package itself, and Caterease will actually locate all of the various items in their separate menus automatically.

Adding Package Items to a Menu Item

1. Click the **Setup** sidebar on the left side of the screen and click **Menu Manager**.
   Result: The Menu Manager window opens.
   *Note: As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Menus** > **Menu Manager**.*

2. Select the menu item you want to use as your package, or add a new item.
    Note: You must first choose an item to act as your package, then connect associated items to it.

3. Click the **Package Items** tab at the bottom of the Menu Manager.
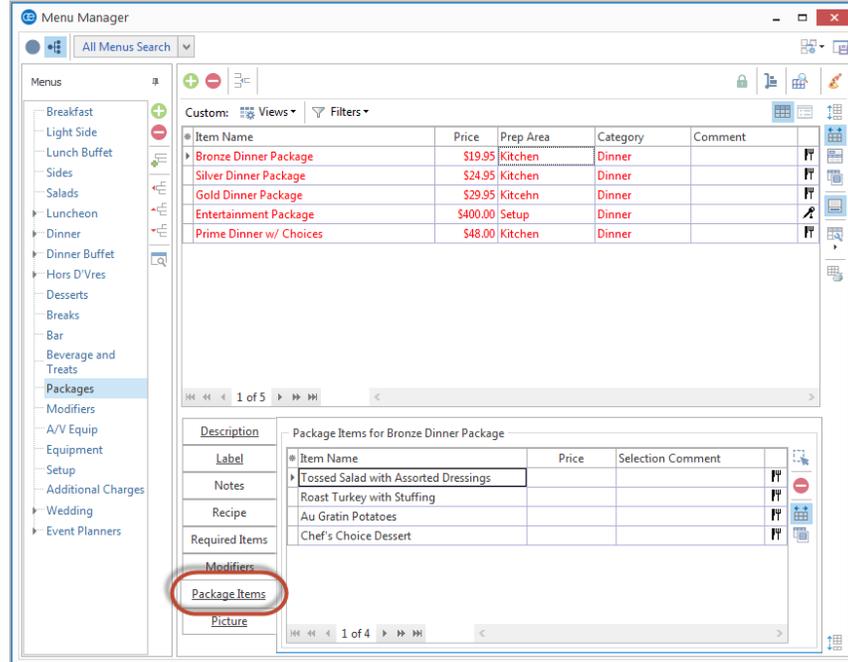
4. Click the **Select Items** button at the right-hand side of the **Package Items** tab.
   Result: The Select Menu Items window opens.

5. In the left pane of the Select Menu Items window, click the title of a menu where your package items are stored.

6. Highlight and select items in one of the following ways:
   *Note: All selected items will be inserted at the bottom of the **Package Items** tab by default, but can be dragged and dropped to any position.*

   - Double-click a single item.
     *Result: That item is inserted into the **Package Items** area, and the Select Menu Items window remains open.*

   - Hold your mouse button down on one individual item (without moving) for a half-second and drag that item from the Select Menu Items window onto the **Package Items** tab.
     *Result: The item is inserted into the **Package Items** area.*

   - Select a group of items by dragging over them, or using your **[Shift]** or **[Ctrl]** keys, and then hold your left mouse button down and drag and drop them onto the **Package Items** tab.
     *Result: The items are inserted into the **Package Items** area.*

- Click the **Select Items** button at the top left of the Select Menu Items window.
  *Result: Any highlighted items are inserted into the **Package Items** area, and the Select Menu Items window remains open.*

- Click **OK**.
  *Result: Any highlighted items are inserted in the **Package Items** tab, and the Select Menu Items window closes.*

7. **[Optional]** Enter a <u>Selection Comment</u> for your package items.
   Note: This comment can be used as a hint when selecting items for an event; examples might include "Package Portion," "Per Person," etc.

8. **[Optional]** Add or remove a price to be associated with the package item.
   Note: This price will be retrieved with the package when it is selected into an event, and will default to the price applied when the package item was added to your menus.

Editing Additional Package Item Details

*Tip: If you want the new columns you've selected to be displayed in the **Package Items** tab grid as a default, click the **Save Current Window Settings** button at the top right of the Menu Manager window.*

1. Click the **Quick Column Customizing** button, located at the top left of the grid on the **Package Items** tab.
   Result: A drop-down list of optional columns appears (see table below).

2. Click the checkbox next to any column heading to have that column appear in the grid.
   Result: Any columns with checks next to them appear in the grid.

   *Note: The **Automatically Set Column Widths** button at the right-hand side of the **Package Items** tab is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.*

3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
   Note: You can also drag column headings left and right in the grid itself.

4. Enter information into the new fields as described below.

Field	Description
Item Name*	Identifies the package item.
Price*	Indicates the price of the item.
Selection Comment*	Can be used as a hint when selecting items for an event; examples might include "Package Portion," "Per Person," etc.
Cost	Indicates the cost of the item; will default to cost applied to package item when it was set up.
Type*	Allows you to categorize items as being "Food," "Beverage," "Liquor," "Equipment," "Labor," "Room" or "Other"; will default to cost applied to modifier item when it was set up.
Default Qty	Allows you to establish a default quantity for the item when pulled into an event; can be used in conjunction with "Linked" below to calculate a quantity per guest (e.g., a Default Quantity of "3" for each guest attending the event).
Linked	Offers a checkbox allowing you to link the quantity of this item to the guest count of an event as a default.
Rounding	Used in conjunction with the two options above to avoid partial quantities; e.g., a pastry with the Default Quantity of "1.5" which is also Linked to the guest count for a party of 25, will default a quantity of "37.5" pastries. In this case you might round it "Up."
Min Qty	Allows you to establish a minimum quantity for an item when it is selected into an event.
* Displayed on the grid by default.	

Unit 4: Menu Manager Tools

Objectives:

Upon completing this unit, you will be able to:

- *Update the cost of a menu item based on the current ingredients list.*
- *Use the Auto Sum feature to change menu item costs on-the-fly.*
- *Update the cost of event food/service items based on the current menu cost.*
- *Update the price of a menu item based on current menu cost.*
- *Use the Markup feature to update the price of individual menu items.*

Copying Items from Menu to Menu

You can copy existing menu items from one menu to another - either individually or multiple items at one time.

Copying Menu Items

1. In the left pane of the Menu Manager window, click the title of the menu containing items you want to copy.

2. In the main pane of the window, select the item or items you want to copy.
   *Note: Select multiple items by either holding your**[Shift]**key down to select a group of contiguous items or holding your**[Ctrl]**key down to select individual items.*

3. Click your right mouse button over any one of the selected items.
   Result: A pop-up menu of options appears.
   Note: If you right-click an item that's not currently selected, all selected items become unselected.

4. Choose **Special Editing** > **Copy Selected Items**.
   Result: A confirmation message appears.
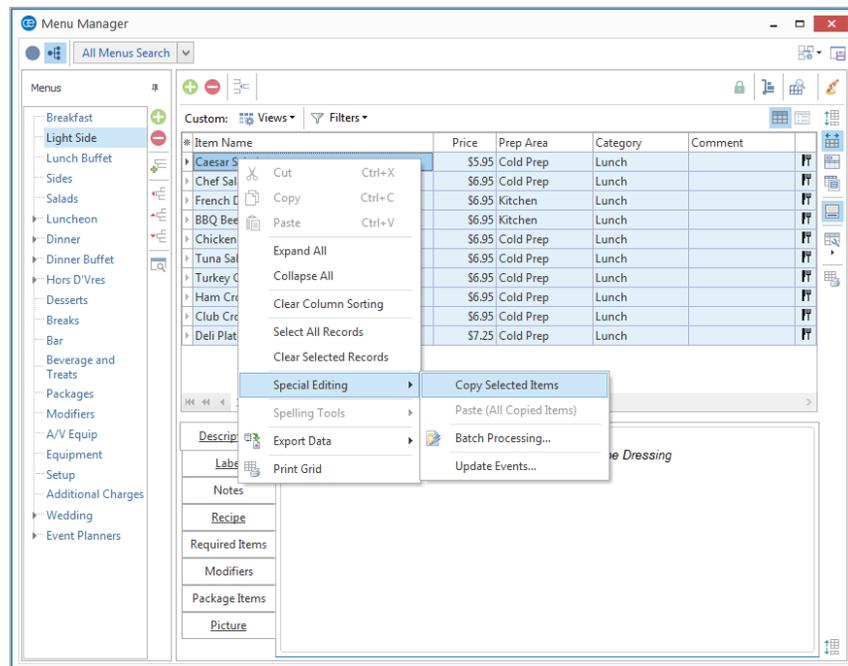
5. Click **Yes**.
   Result: An informational message appears.

6. Click **OK**.

7. In the left pane of the Menu Manager window, click the title of the menu into which you want to copy the items.

8. In the main pane of the window, click your right mouse button and choose **Special Editing** > **Paste (All Copied Items)**.
   Result: A confirmation message appears.

9. Click **Yes**.

> **Important Note:** If this menu already contains items, you will be prompted whether or not to delete them prior to pasting the copied items. Click **No** to have the existing items remain in the menu and then paste the copied items; click **Yes** to remove the existing items from the menu first.

Making a Menu Temporarily Inactive

You can make one of your default menus temporarily inactive, so that it will not appear when selecting menu items for an event, and will not appear on your Menu Summary print. This can be particularly useful for seasonal menus.

Making a Menu Inactive

1. In the left pane of the Menu Manager window, right-click a menu title.
   Result:A pop-up menu appears.

2. Select **View/Edit Menu Details**.
   Result: The details window for the selected menu appears.
   Note: As an alternative, you can click a title to select it and then click the

   View/Edit Menu Details button [ ] *on the right-hand side of the titles pane.*
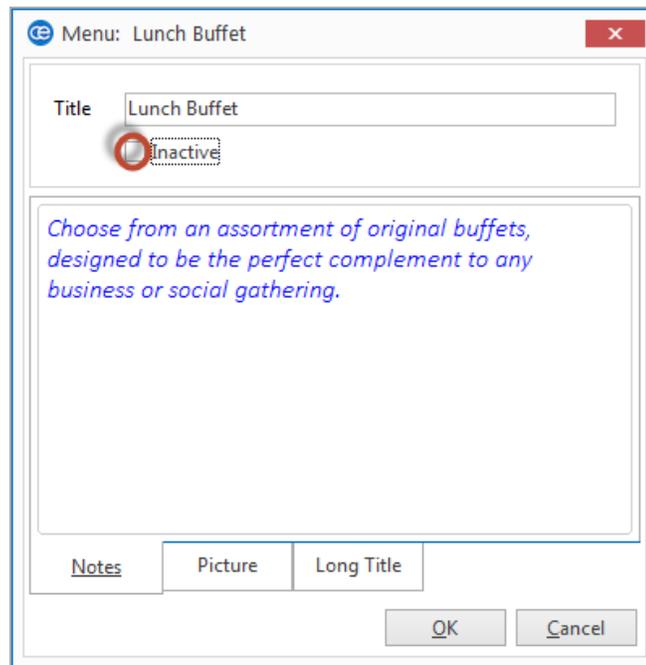
3. Click the checkbox labeled **Inactive**.
   Result: The menu is made inactive.
   Note: The menu's title will still appear in this left pane of Menu Manager, but will be grayed out; it will no longer be shown when selecting menu items for an event or when generating the Menu Summary print.

Inserting Page Breaks

The page break inserts a marker after the item you select. This marker indicates that the item is to appear on a separate page. A well-placed page break will enable your prints to be more logically organized (perhaps serving as dividers among soups and salads, entrees, desserts, etc.).

Inserting Page Breaks

1. Click on any Sub-Event in Event Manager.

2. From the **Food/Service** tab, right-click where you would like a new page to begin.

3. Select **Page Break (on prints)**.
   Result: A yellow line is inserted under the last item name which will appear before the page break. When you generate a print, the designated item will display on its own page.
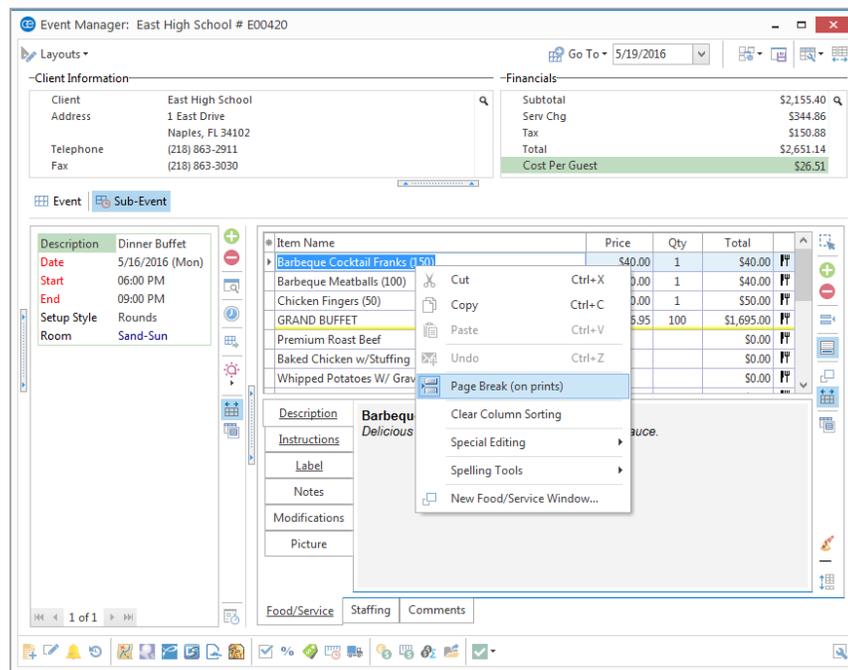
Making Changes to Menu Items in Batch

You can make changes to multiple menu items in your default menus simultaneously. Change such details as menu item Type, Category, whether the item is published to your online ordering website, whether an item is inventoried or a host of other options - including basic font formatting of menu item Descriptions, Recipes, Labels or Notes.

Batch Processing Menu Items

1. In the left pane of the Menu Manager window, click the title of the menu containing items you want to edit (or click **All Menus** to select items from multiple menus simultaneously).

2. In the main pane of the window, select multiple items by either holding your **[Shift]** key down to select a group of contiguous items or holding your **[Ctrl]** key down to select individual items.

3. Click your right mouse button over any one of the selected items.
   Result: A pop-up menu of options appears.
   Note: If you right-click an item that's not currently selected, all selected items become unselected.

4. Choose **Special Editing** > **Batch Processing**.
   Result: The Batch Processing window opens.

Batch Processing		
General	Formatting	
Type		☐
Cost		☐
Markup		☐
Price		☐
Prep Area		☐
Acct Code		☐
Item ID		☐
Category		☐
Comment		☐
Item Unit		☐
Packing Unit		☐
Qty/Unit	0	☐
Unit Rounding		☐
Vendor		☐
Url		☐
Usage Var	0	☐
No Tax	☐	☐
No SC	☐	☐
No Grat	☐	☐
Default Qty		☐
Rounding		☐
Linked	☐	☐
Delivery	☐	☐
Hide	☐	☐
Inactive	☐	☐
Inventory Item	☐	☐
Inv Min	0	☐
Required Item	☐	☐
Description	Copy To Label	☐
Food Service Access	🔍	☐
	OK Cancel	
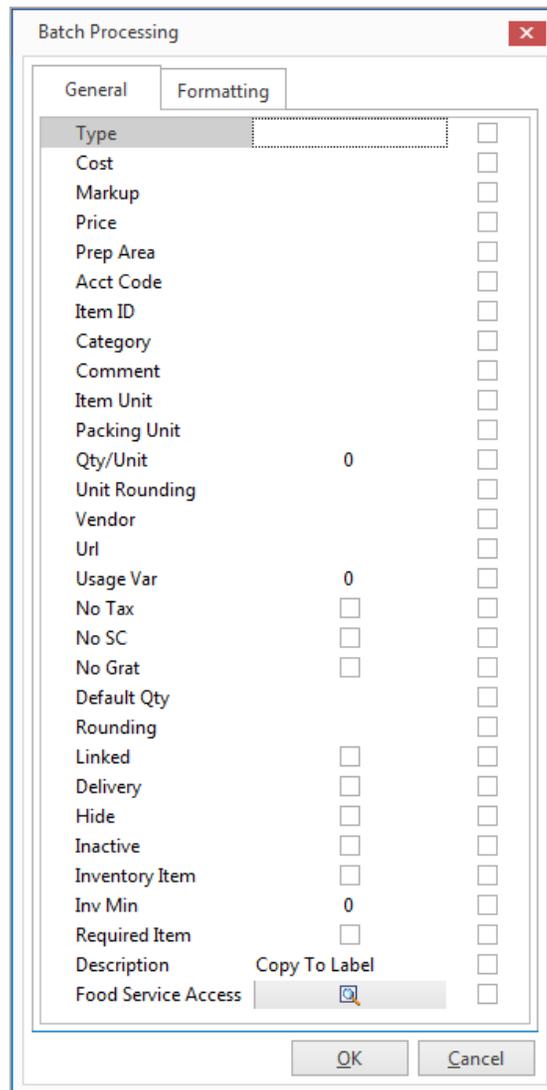
5. On the **General** tab of the Batch Processing window, click the checkbox

next to any field you would like to change for all of your selected menu items.

6. In the field itself, enter the new value you would like for all selected menu items.
Note: Most fields have for your convenience. Some, such as No Tax, No SC, Linked, Hide, etc., have checkboxes that you can enable or disable for all selected menu items.

7. **[Optional]** Click the **Formatting** tab and establish formatting changes (font style, size and alignment), then click the checkbox at the bottom of the tab to indicate which detail of all selected menu items you want reformatted (Descriptions, Recipes, Labels or Notes).

8. When finished, click **OK**.
Result: Your changes are applied to all selected menu items and a confirmation message appears.
Note: Depending on the number of changes/items, this could take a few minutes.

9. Click **OK** to close the confirmation message window.

Updating Menu Costing

You can quickly update menu item costs (and even prices) from your program's master ingredients list or using interfaces with other menu management software. Once menu information is updated, you can even update the costs of future events you have already booked.

Updating Costing from Ingredients List

Tip: After you have upgraded the costs of your menu items, you may want to upgrade the costs of your future events based on these new item costs.

1. Click the **Setup** sidebar on the left side of the screen and click **Menu Manager**.
Result: The Menu Manager window opens.

2. Click the **Tools** button, located at the top of your screen, and choose **Menu Costing Update** > **From Ingredients List**.

Result: *The Update Menu Costing window opens.*
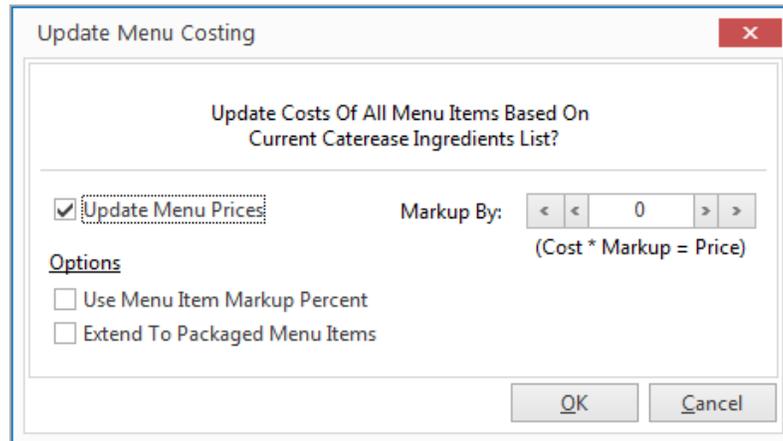
3. **[Optional]** Click into the checkbox next to **Update Menu Prices** and enter an optional markup number to multiply cost by if you wish to update your menu prices as well as their costs.
   Note: The Markup By field is not entered as a percentage, but as a decimal which is multiplied by the total cost of the menu item. For example, if the updated ingredients cause the total cost of a menu item to be $3.00, and you have "1.1" entered in the Markup By field, the price will calculate to $3.30 ($3.00 X 1.1).
   *Note: You can update prices only based on previous cost changes by choosing **Menu Pricing Update** in Step 2, above.*

4. Choose options at the bottom of the window as desired, by clicking the corresponding checkboxes:

   • **Use Menu Item Markup Percent**
   Allows you to markup menu item prices using the specific markup percent attached to each individual menu item, rather than establishing a global one here in this tool.
   Note: If no markup exists for a menu item, the markup identified here in this tool will be used.

   • **Extend to Packaged Menu Items**
   Extends cost and/or price markups to items on the Package Items tab at the bottom of Menu Manager, in addition to regular menu items.

6. Click **OK**.
   Result: An informational prompt appears.

7. Click **OK**.
   Result: The update tool closes down and your menu costs and/or prices are updated.

Updating Costing from Another Source

1. Click the **Setup** sidebar on the left-hand side of the screen and click **Menu Manager**.
   Result: *The Menu Manager window opens.*

2. Click the **Tools** button at the top of the screen and choose **Menu Costing Update** > **From Other Source**.

3. Select the "Other Source," i.e., interface.
   Result: *A browse window appears, open to the folder you have established as your export folder for this interface.*
   Note: *If you are prompted that you have not yet established an export folder (or that the folder you have selected does not contain the appropriate file),check to confirm you have already exported information from your menu management program.*
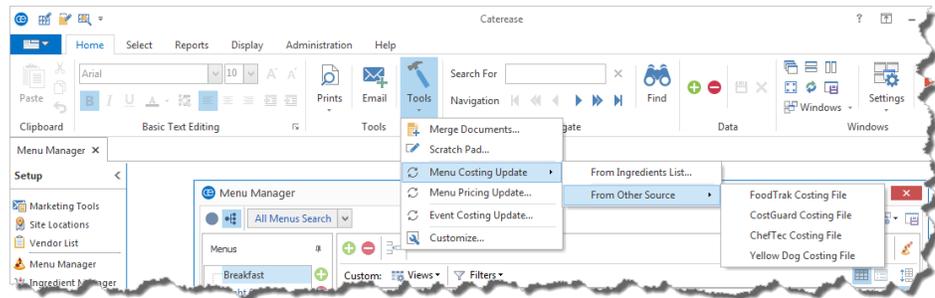
4. Select the file of menu information to be imported, and click **Open**.
   Result: *A confirmation message appears.*
   Note: *This message might include important information such as the modified date of your selected costing file, and the date you last updated your menu costing.*

5. Click **Yes** to confirm.
   Result: *A split screen appears listing menu items, prices and costs being imported from Food-Trak and their corresponding items in Caterease.*

6. **[Optional]** Click **Include Sell Price** if you would like the sell prices of items to be updated along with their costs.

7. Click **Process Update**.

8. Click **Print** (top left of form) if you want to generate a report of all items listed on this screen, including both those that were updated and those that did not find matches in Caterease.

Updating Menu Pricing

You can update pricing for all menu items at one time, based on changes to item costs.

Updating Menu Pricing

1. Click the **Setup** sidebar on the left-hand side of the screen and click **Menu Manager**.
   Result:The Menu Manager window opens.

2. Click the **Tools** button, located at the top of your screen, and choose **Menu Pricing Update**.
   Result:The Update Menu Pricing window opens.

3. Enter a markup number to be multiplied by item costs to calculate the new prices.
   Note: The <u>Markup By</u> field is not entered as a percentage, but as a decimal which is multiplied by the total cost of the menu item. For example, if the updated ingredients cause the total cost of a menu item to be $3.00, and you have "1.1" entered in the <u>Markup Menu Item By</u> field, the price will calculate to $3.30 ($3.00 X 1.1). (This number will be ignored by menu items with individual markups already assigned.)
   Note: You can update costs and prices together by choosing Menu Costing Update in Step 2, above.

4. Click into the Extend To Packaged Menu Items checkbox to extend price markups to items on the Package Items tab at the bottom of Menu Manager, in addition to regular menu items.

   Important Note: Since this tool multiplies the cost times the markup to calculate price, if a cost is zero, the new price will also equal zero. You may want to confirm this box is checked to avoid updating prices to zero.

5. Click **OK**.
   Result:*An informational prompt appears*.

6. Click **OK.**
   Result: *The update tool closes down and your menu costs and/or prices are updated.*

Updating Event Costing

Once you have updated the costs of items in your default menus, you can use those new numbers to update the costs of future events you have already booked.

Updating Event Costing

*Tip: You can also update costing of a specific event by opening that event in Event Manager, clicking the **Tools** button and choosing **Costing Update**.*

1. Click the **Setup** sidebar on the left side of the screen and click **Menu Manager**.
   Result: *The Menu Manager window opens.*

2. Click the **Tools** button, located at the top of your screen, and then choose **Event Costing Update** at the top of your Caterease screen.
   Result: *The Event Costing Update window opens.*

Event Costing Update

Update Costs Of Event Food/Service Items Based On Current Caterease Menu Costs?

Date Range
- From Date   5/19/2016 ⌄   thru   5/19/2016 ⌄
- Within Date Range

Options

Exclude Status

None selected   ⌄

☑ Use Food/Service Item Ingredients To Derive Cost

☑ Close After Update   OK   Cancel

3. Click into the radio button to either to update costs for all events after a certain date or for all events within a certain date range.

4. **[Optional]** Click the down arrow to the right of the Exclude Status field to select any statuses you would like to omit from the update.

5. Click **OK**.
   Result: *A confirmation message appears.*

6. Click **Yes** to confirm.
   Result: *An informational prompt appears.*

7. Click **OK** on your results message.
   Results*:The Event Costing Update window closes and events in your date range have been updated.*

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