

# Caterease User Training Guide



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# Welcome to Caterease

## Important Caterease Concepts

### Single Source

Using a database software like Caterease is not like using Microsoft Word or Excel. If you want to edit a print, you don't actually edit the print itself. Instead, you change the details of the event in Event Manager, and every single print, report, and query that reference that party will be updated instantly!

### Custom Event Prints

Don't pay too much attention to the titles of any event prints you see in your program. You have a Print Designer that lets you create and modify custom event prints - deciding what goes on them and what titles they will have. You can change a "contract" to a "proposal" or an "invoice" or even a back-of-house print quickly and easily.

### Custom Screen Displays

Virtually every screen in Caterease can be customized to suit your needs. You can remove fields, rearrange fields, rename some existing fields, and even create your own user-defined fields.

### Quick, Easy Data-Entry

Edit information on any screen in the program by simply typing and pressing your **[Enter]** or **[Tab]** key to move from field to field. Most fields offer a custom quickpick list of options. You can modify these lists and either use your mouse to choose from them or simply begin typing into the field and you will be scrolled to a match for what you type.

### Consistent Tools

The following buttons exist throughout the program to help you perform important functions:



#### Add Record

Use this button to add any record - an event, client, menu item, etc., - to the program.



#### Delete Record

Use this button to delete any record - an event, client, menu item, etc., - from the program.



#### Select

Use this button to select records - menu items, site locations, etc., - from a pre-existing list.



#### Show Details

Use this button to display the details of a particular record.



#### Quick Column Customizing

Use this button to choose which columns of details are shown in a detail grid.



#### View Conflicts

Use this button to view additional information (usually conflicts) about records listed in a grid.



#### Save Changes

Use this button to save the changes you have made to any record.



#### Cancel Changes

Use this button to cancel changes and revert a record back to its previously saved state.



## Unit 1: Introducing Event Manager

In this section, you will learn:

- Entering General Event Information
- Searching for Existing Parties
- Reviewing and Editing Sub-Event (Meal) Information
- Selecting Event Menu Items from Default Menus



# Entering General Event Information


Whether adding a new event or editing an existing one, the data-entry process is simple. The details below will help you enter data in the Event display of Event Manager.

## Filling Out General Event Information

1. Click the **Event Manager** button from the **Main** sidebar group.
2. On the Event Manager screen, click into the first field on the **General** tab or **Miscellaneous** tab.  
**Note:** This screen can be completely redesigned to suit your needs and preferences.

The screenshot displays the Event Manager interface for 'Acoustics Associates # E00257'. The top section includes a 'Go To' dropdown set to '6/9/2016' and navigation icons. Below this, the 'Client Information' tab is active, showing fields for Client (Acoustics Associates), Address (1661 Estero Blvd, Ft. Myers, FL 33931), Telephone ((612) 544-8901), and Fax ((612) 544-2928). To the right, the 'Financials' section shows a breakdown: Subtotal (\$668.75), Serv Chg (\$103.80), Tax (\$46.81), Total (\$819.36), and Cost Per Guest (\$23.31). The main area is divided into 'General' and 'Miscellaneous' tabs. The 'General' tab is selected, showing fields for Party Name (Company Lunch), Sales Rep (John Smith), Theme (Banquet), Category (Social), Booking Contact (Grover, Rochelle), and Site Contact (Grover, Rochelle). The Event # is E00257, and the Date is 5/3/2016. A calendar widget is open, showing the date selection process. The 'Notes' section contains the text 'Each table will have a flower arrangement.' and an image of a bouquet of flowers. The bottom of the screen features a toolbar with various icons for navigation and editing.

3. Edit each field by following the guidelines below, pressing the **[Enter]** key to move from one field to the next:
  - For fields such as Party Name or guest number fields, simply click into each field and type.  
**Note:** Your *Guaranteed guest count* might default to a certain percent of your *Planned* number, and you can optionally make the *Guaranteed* number take priority if it is higher than the *Actual*. (These are both settings you can modify on the **Managers** tab of your program's **Global Settings**.)
  - For fields with associated drop-down quickpick lists (Sales Rep, Theme, Reference, Status, etc.), click the down arrow at the right of each field, then choose an option from the list.  
As an alternative to clicking the down arrow, simply begin typing into a quickpick field. The quickpick list will automatically scroll to match what you type. For date fields, type a date or click the down arrow at the right of the field to access the drop-down calendar.  
**Note:** Date fields in the Caterease Professional version offer *Smart Date Editing*, allowing you to type words such as "today," "tomorrow," "Monday," "EOM" (end of month), even "EOM+1," etc., directly into the field. For financial fields (such as *Cancellation Charge*), simply type a dollar amount or click the down arrow at the right of the field to access the drop-down calculator.

- If you did not select a default contact person when you created the event, you can retrieve one now by clicking the down arrow next to the Booking Contact or Site Contact field and then clicking the **Select Contact from File** button .

**Note:** *If the name you want is not available in this window, you can type it directly into your Event Manager screen and then add it for future use to the list of contacts associated to the current*

*account by clicking the **Add Contact to File** button .*


3. **[Optional]** Enter general notes pertaining to the event into the **Notes** text block at the bottom of the display.
4. **[Optional]** Add specific meal information (meal, venue, times) using the Sub-Event feature.

## Searching for Events

You can find existing events based on virtually any detail. A special locator tool lets you search specifically by date, while the Event Finder tool lets you use basically any event detail or combination of details to locate the party you need.

### Searching by Event Date

For fast date searches (today, this month, etc.), follow these steps:

1. Click the **Event Manager** button on the **Main** sidebar to open the Event Manager.
2. Click the **Go To** button  **Go To** ▾, located towards the upper right-hand side of your screen.  
**Result:** A drop-down list of options appears.
3. Choose to go to the first event taking place today, this month, next month, last month, or next fiscal quarter.

### Searching by a Specific Date

1. Next to the **Go To** button at the top of your Event Manager screen, click the down arrow to the right of the current date field.  
**Result:** A drop-down calendar opens.
2. Click the left-and-right arrows on the drop-down calendar to scroll backward or forward one month, respectively, OR hold your left mouse button down on the month's name and drag up or down to choose another month.
3. Click on a date to select it.


**Tip:** Events in Event Manager are sorted by event date, and you are placed on the first record for your chosen date.

**Note:** If you wish to scroll forward through the records on that date, use the navigation toolbar at the top left of your screen.

## Using the Event Finder

1. Click the **Find** button (binoculars), located in the **Home** ribbon tab at the top of your Caterease screen.  
**Result:** *The Event Finder window opens.*

2. In the **Search By Fields** area, type the text you would like to search for.  
**Note:** *You may search by more than one field. Many fields, such as Status, Category, Theme, etc., have a corresponding drop-down list to the right of the field.*
3. In the **Search Rules** area, select the appropriate rule.  
**Note:** *Confirm that **Ignore Case** is selected if you want to ignore capitalization when you enter your text.*
  - **Starts With** - The field you chose in the **Search By Fields** area starts with the words or letter you typed.
  - **Exact Match** - The field you chose in the **Search By Fields** area contains exactly the words you typed (and nothing else).
  - **Anywhere in Field** - The words or letters you typed appear anywhere in the field you chose in the **Search By Fields** area.
  - **Sounds Like** - The words or letters you typed match phonetically to the words in the field you chose in the **Search By Fields** area.

4. **[Optional]** Click the radio button next to **And** or **Or**, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.
5. **[Optional]** Click into the **Include Prefixes** checkbox and then type the prefix (A, An, The) into the fields within the **Search Prefixes** section to include prefixes in your search.
6. Click the **Find Records** button, located at the bottom of the window.  
***Note:** Confirm that **Auto Complete Key Numbers** is selected if searching by numeric fields, such as Event #, to ensure the correct search format is in place.*
7. **[Optional]** Click the **Show Results/Hide Results** button  at the top right of the Finder to display a list of all records your search has found thus far.  
***Note:** Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Finder tool down.*
8. **[Optional]** If you accidentally skip over the record you want, click the arrows on either side of the **Find Records** button to move forward or backward.
9. Once your record is located, click **Close**.  
***Result:** The Finder window closes and you are placed on the record you sought.*  
***Note:** Click the **Clear Criteria** button after you have run a search, to clear all results and begin again.*

## Reviewing and Editing Sub-Event (Meal) Information

The Sub-Event display in Event Manager is where you enter and manage the specific "meal information" about a party: its menu, venue, and times.

### Editing Sub-Event Information


1. In Event Manager, click the **Sub-Event** button on the left-hand side of the window.
2. In the sub-event details area on the left side of the window, click into any field to edit.

3. [Optional] Click the **Show Details** button  to open the sub-event in a separate pop-up window for more detailed editing.

### Retrieving Menu Items

1. Click the **Select Menus** button , located on the right-hand side of the Sub-Event display.

Item Name	Price	Qty/Unit
The Skyway Buffet	\$18.95	1
Lite Start Buffet	\$9.71	1
Wyles Breakfast Buffet	\$17.95	1
Midwesterner	\$18.95	1
Daybreaker	\$15.95	1
Morning Delight	\$15.95	1
Eye Opener	\$15.95	1
The Harbor Buffet	\$15.95	1
Wyles Special	\$15.95	1

**Description**  
**The Harbor Buffet**   
*includes: fluffy scrambled eggs, french toast, bacon and sausage, hashbrown potatoes, fresh fruit, english muffins, assorted pastries, chilled fruit juice, coffee, tea or milk*

2. In the menu selection window that appears, click on any title in the left pane.
3. Retrieve menu items into the party by double-clicking individual items, dragging and dropping multiple items, or by selecting items and then clicking the **Select** or **OK** button.

## Unit 2: Booking a New Event with the Event Wizard

In this section, you will learn:

- Selecting a Client for the New Event
- Entering Basic Event Details
- Selecting Menu Items for the New Event
- Emailing an Event Print



## Event Wizard, Step 1: Selecting a Client

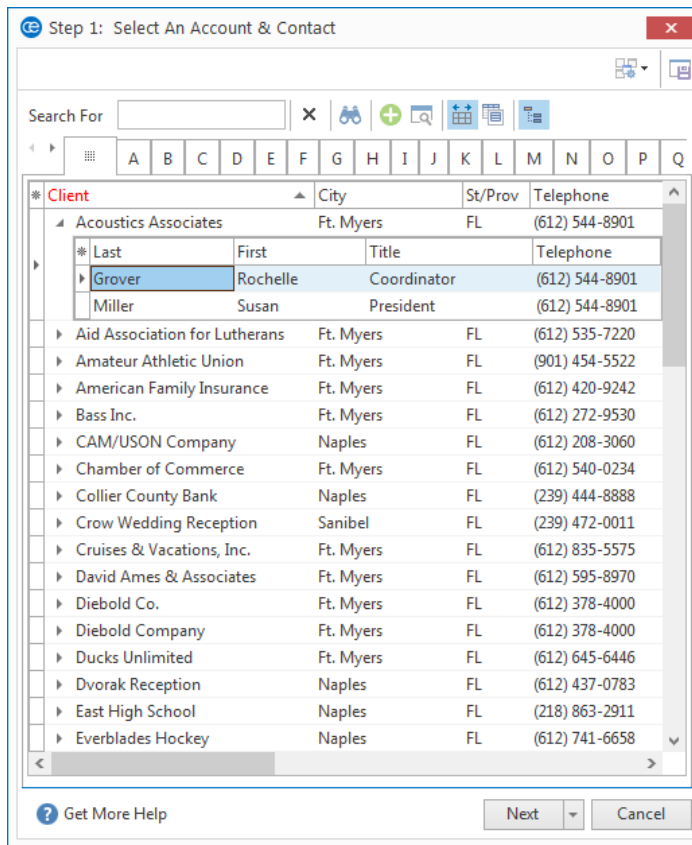
When booking an event using the Event Wizard, the first step is choosing or adding the customer. You can quickly search through your existing customers by name, or use a Finder tool to search based on any client detail. Or you can optionally add a brand-new client.

### Searching for an Existing Client by Name

1. Click the **Tools** sidebar group, located on the left-hand side of your screen.
2. Click the **Event Wizard** button.

**Result:** The Event Wizard tool opens on the Step 1: Select An Account & Contact window.

**Note:** You can also access the **Event Wizard** button  from the upper left-hand corner of your screen.



Client	City	St/Prov	Telephone
Acoustics Associates	Ft. Myers	FL	(612) 544-8901
* Last			
Grover Rochelle			(612) 544-8901
Miller Susan			(612) 544-8901
▶ Aid Association for Lutherans	Ft. Myers	FL	(612) 535-7220
▶ Amateur Athletic Union	Ft. Myers	FL	(901) 454-5522
▶ American Family Insurance	Ft. Myers	FL	(612) 420-9242
▶ Bass Inc.	Ft. Myers	FL	(612) 272-9530
▶ CAM/USON Company	Naples	FL	(612) 208-3060
▶ Chamber of Commerce	Ft. Myers	FL	(612) 540-0234
▶ Collier County Bank	Naples	FL	(239) 444-8888
▶ Crow Wedding Reception	Sanibel	FL	(239) 472-0011
▶ Cruises & Vacations, Inc.	Ft. Myers	FL	(612) 835-5575
▶ David Ames & Associates	Ft. Myers	FL	(612) 595-8970
▶ Diebold Co.	Ft. Myers	FL	(612) 378-4000
▶ Diebold Company	Ft. Myers	FL	(612) 378-4000
▶ Ducks Unlimited	Ft. Myers	FL	(612) 645-6446
▶ Dvorak Reception	Naples	FL	(612) 437-0783
▶ East High School	Naples	FL	(218) 863-2911
▶ Everblades Hockey	Naples	FL	(612) 741-6658

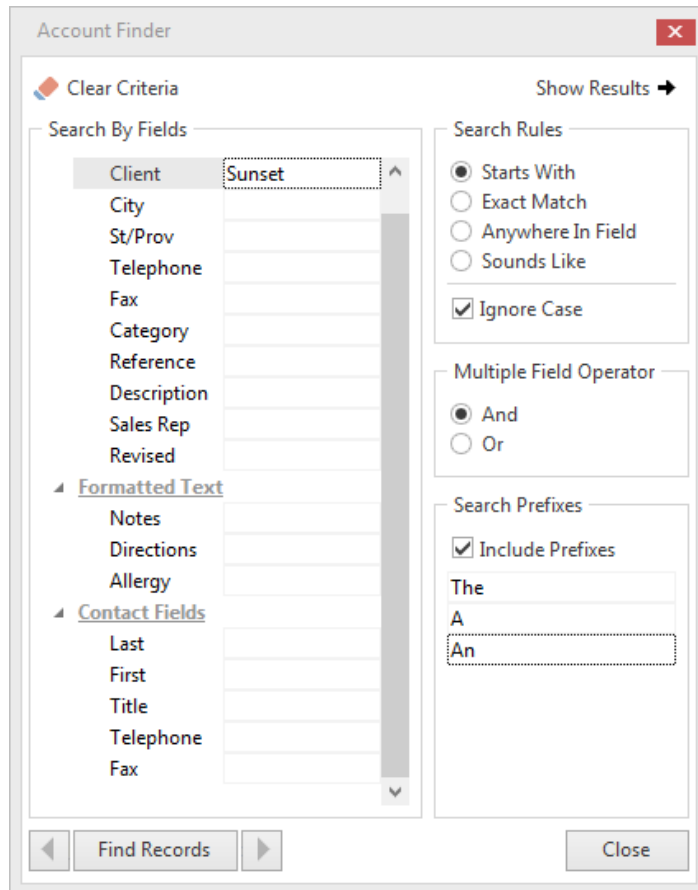
3. Click into the **Search For** tool at the top left of the window and begin typing the name of your desired account.  
**Result:** You are scrolled to a match as you type.  
**Note:** You can use the Account Finder tool to search for clients by any detail, or choose to add a new client.
4. **[Optional]** Select a default contact person for the new event from the drop-down list under the Client name.

- When finished, click **Next** at the bottom right of the Wizard tool to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.


## Using the Account Finder Tool

- Click the **Search Records** button , located in the ribbon tab at the top of the Step 1: Select An Account & Contact window.

**Result:** The Account Finder window opens.





- In the **Search By Fields** area, type the text you would like to search for.  
**Note:** You may search by more than one field. Many fields, such as Category, Reference, Description, etc., have a corresponding drop-down list to the right of the field.
- In the **Search Rules** area, select the appropriate rule.  
**Note:** Confirm that **Ignore Case** is selected if you want to ignore capitalization when you enter your text.
  - Starts With** - The field you chose in the **Search By Fields** area starts with the words or letter you typed.

- **Exact Match** - The field you chose in the **Search By Fields** area contains exactly the words you typed (and nothing else.)
  - **Anywhere in Field** - The words or letters you typed appear anywhere in the field you chose in the **Search By Fields** area.
  - **Sounds Like** - The words or letters you typed match phonetically to the words in the field you chose in the **Search By Fields** area.
4. **[Optional]** Click the radio button next to **And** or **Or**, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.
  5. **[Optional]** Click into the **Include Prefixes** checkbox and then type the prefix (A, An, The) into the fields within the **Search Prefixes** section to include prefixes in your search.
  6. Click the **Find Records** button, located at the bottom left-hand side of the window.
  7. **[Optional]** Click the **Show Results/Hide Results** button  at the top right of the Account Finder window to display a list of all records your search has found thus far.  
***Note:** Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Finder tool down.*
  8. **[Optional]** If you accidentally skip over the record you want, click the arrows on either side of the **Find Records** button to move forward or backward.
  9. Once your record is located, click **Close**.  
***Result:** The Finder window closes, and you are positioned on the record you sought.*
  10. **[Optional]** Click the expand button to the left of the Client name and select a default contact person for the new event.
  11. Click **Next** at the bottom right of the Wizard tool to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

**Tip:** Click the **Auto Expand Contacts** button, located in the toolbar at the top of the Select An Account window, to automatically display the account's contacts.

## Adding A New Account for the New Event (Optional)

1. Click the **Add New Account** button , located in the ribbon tab at the top of the Step 1: Select An Account & Contact window.  
***Result:** A confirmation prompt appears.*
2. Click **Yes** to confirm.  
***Result:** The Account Details window opens.*

3. Enter a name into the Client/Organization field, and press your **[Enter]** key.  
**Result:** Your cursor moves to the next field.
4. Fill in additional account information as desired by typing into each field and pressing **[Enter]** to move from field to field.  
**Note:** Information on the **Miscellaneous** tab ("Category," "Reference," etc.), can be used to track this customer.
5. **[Optional]** Click the **Add A New Contact** button , located at the middle right of the window, to add a new contact person for your new client.
6. When finished entering details for the new client, click **OK** at the bottom of the Account Details window.  
**Result:** You are taken back to the account selection screen, with the new account you added highlighted.
7. Click **Next** at the bottom right of the Wizard tool to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

## Event Wizard, Step 2: Entering Event Details


The second step of the Event Wizard has you filling out the basic details of your new event. This entire window can be customized to suit your preferences, with fields being added, removed, or rearranged. You can even create multiple custom Wizards for each type of event you book at your company.

### Entering General Details

1. Enter Event and Sub-Event details into simple text fields such as Party Name, guest fields, etc., by simply typing into the fields as desired.  
**Note:** The Party Name can be set to default as the name of the client, and the Guaranteed guest field can be set to default to a certain percentage of the Planned number (see "Managers Tab" under Editing Global Settings).
2. Click the down arrow to the right of various fields to use available drop-down lists ("quickpicks"), when applicable.  
**Note:** You can customize quickpick lists to suit your needs, and optionally assign default values for these fields.


3. Enter an event date by either typing into the Date field or by accessing the drop-down calendar to make a selection.  
**Note:** Professional version users can enter words such as "Tomorrow," "Monday," or even "EOM" ("End of Month") or "EOM+1" in lieu of dates.

The screenshot shows a 'Date & Times' dialog box. At the top, there's a 'Date' field with a dropdown arrow, currently showing '1/22/2016' and 'Friday'. Below it are 'Start' and 'End' date fields. The 'Start' field shows 'Wednesday, December 23, 2015'. The 'End' field shows 'January, 2016' with a calendar grid below it. The calendar grid shows days of the week (Sun to Sat) and dates. The date '22' is highlighted. At the bottom of the calendar grid is a 'Clear' button.

4. Enter times for the new event either by typing directly into the Start and End time fields, or by clicking the **Time Wizard** button  and dragging and dropping times into position.

**Note:** Time field names can be [customized in your program's Global Settings](#).

**Important Note:** Setup and Tear Down time fields are entered as hours and minutes, not as actual times. The total time of a party will be calculated as its "Start" time minus any "Setup," until its "End" time plus any "Tear Down."

5. **[Optional]** For on-premise parties, select a Setup Style and Room for the event by clicking the down arrow to the right of each field and choosing an option.  
**Note:** The list of Banquet Rooms will show the maximum guest capacity for each room based on your chosen setup style. Any room highlighted in red does not use the selected setup style. As an option, click the **Room Selection** button  to the right of the Room field to have CaterEase determine the best room for the event. (Available with the Banquet Rooms add-in module.)

6. **[Optional]** For off-premise parties, click the **Site Location** tab, located to the right of the **Sub-Event Information** tab in the middle of the window, and enter your site location details into the available fields, including Name, Address, etc., or click the **Select Site Location** button  to select from your list of commonly used locations.

**Note:** You can also click the **Copy from Client** button  to select the client's address as the site.

7. Enter site location directions by typing into the **Directions** text box, located in the bottom pane, optionally formatting text by highlighting, clicking your right mouse button, and choosing **Font**.

**Note:** You can insert images or current date and time by right-clicking within a text box and choosing **Insert**.

8. When finished, click **OK**.

**Result:** Your new event is created and opened in Event Manager, and you are prompted to move on to selecting menu items.

**Tip:** The time and banquet room details you are adding here are for the first sub-event (or meal) of your new party. If the party will have multiple sub-events, you can create additional ones once the Wizard brings you into Event Manager.

## Event Wizard, Step 3: Entering Menu Details

Once you have entered basic event information into the Event Wizard, Caterease creates your new event and opens it in Event Manager. It then asks if you'd like to select menu items for the party. The steps below walk you through the menu-selection process.

### Selecting Menu Items for the New Event

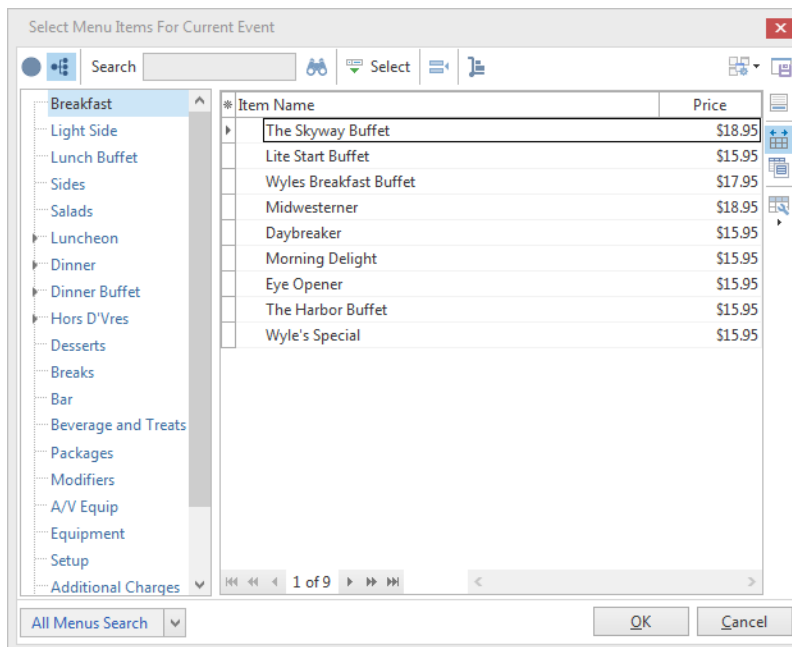
1. After completing Step 2 of the Event Wizard, click **Yes** on the informational message which prompts you to select your menu items for your new event.

**Result:** The *Select Menu Items For Current Event* window opens.

**Note:** If the message is no longer visible, click the **Select Menus** button , located on the right-hand side of the **Sub-Event** display, on the **Food/Service** tab.

2. Click on a menu title in the left pane of the Select Menu Items For Current Event window.

**Result:** Items in the selected menu are displayed in the main (right-hand) pane of the window.



3. Highlight the food/service items you want to add to your event, and retrieve them in one of the following ways:

- Double-click on a single item in the Select Menu Items For Current Event window.

**Result:** The selected item is inserted at the bottom of your event's **Food/Service** grid, and the *Select Menu Items For Current Event* window remains open.

- Hold your mouse button down on one individual item (without moving) and drag that item from the Select Menu Items For Current Event window onto your **Food/Service** grid.

**Result:** The selected item is inserted at the bottom of your event's **Food/Service** grid, and the *Select Menu Items For Current Event* window remains open.

- Hold your left mouse button down on a group of selected items and drag and drop them onto the **Food/Service** grid.

**Result:** The selected items are inserted at the bottom of your event's **Food/Service** grid, and the *Select Menu Items For Current Event* window remains open.

**Note:** Select a group of items by dragging your mouse over them or by holding the **[Shift]** or **[Ctrl]** key down on your keyboard as you click.

- Click the **Select** button at the top left of the *Select Menu Items For Current Event* window.

**Result:** Any highlighted menu items are inserted at the bottom of your event's **Food/Service** grid, and the *Select Menu Items For Current Event* window remains open.

- Click **OK**.

**Result:** Any highlighted menu items are inserted at the bottom of your event's **Food/Service** grid, and the *Select Menu Items For Current Event* window closes.

- Click the **Insert Mode** button  to retrieve menu items in specific positions on the **Food/Service** grid of your event.

**Result:** Once clicked, the feature is enabled, and all subsequently selected menu items are automatically placed above the currently highlighted item on the **Food/Service** grid (rather than always at the bottom); when dragging and dropping, **Insert Mode** allows items to be dropped anywhere at all on the **Food/Service** grid.

**Note:** Items can also be dragged and dropped up and down in the menu on the event's **Food/Service** grid, as well, regardless of the **Insert Mode** feature. **Insert Mode** can be enabled as a default

by clicking it once and then clicking the **Save Window Settings** button  .

## E-mailing an Event Print

You can quickly e-mail a print directly from any Print Preview screen.

### E-mailing an Event Print

1. From an event in Event Manager, click the **Home** ribbon tab and then click the bottom half of the **Prints** button.

**Note:** The **Prints** button is a split button. (Click the top half to select prints from a floating window.)

2. Choose from among **General**, **Event Contracts/Invoices**, or **Event Subprints**.

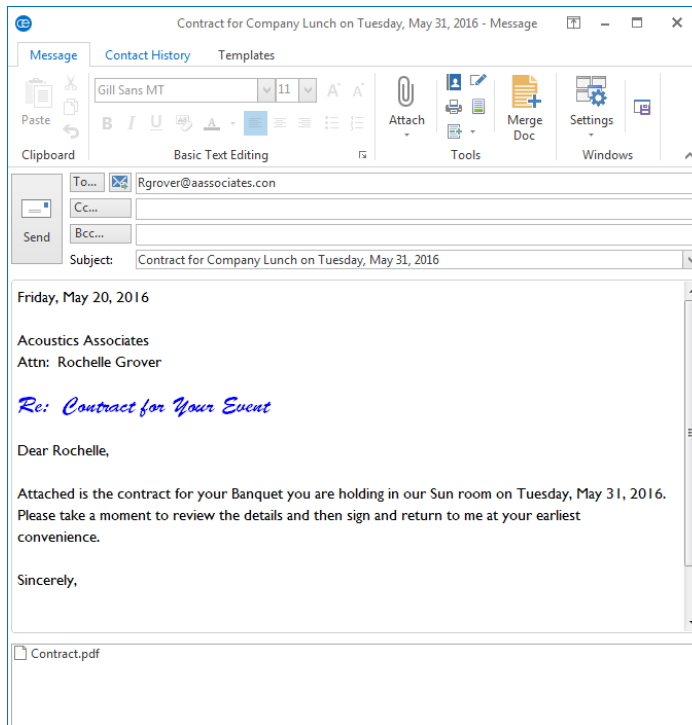
3. Click on the name of the desired print.

**Result:** A Print Preview screen displays.

4. Click the **Email** button, located at the top of the Print Preview screen.

**Result:** Notice that the print is automatically attached as a PDF at the bottom of the e-mail window. You can change the format of this attachment by clicking on it with your right mouse button and selecting **Change Type To** and choosing a different type.

**Tip:** E-mail from CaterEase is automatically sent via your regular e-mail Outbox. Therefore, all return correspondence will be sent to your normal work e-mail address.



5. The To field will automatically populate default e-mail addresses (although this feature can be disabled, if desired).
6. **[Optional]** Enter additional e-mail addresses into the Cc and Bcc fields, separating each address by semicolons.

7. Type a subject for the e-mail into the Subject field, or click the down arrow at the right of the field to access the customizable quickpick list.  
***Note:** This quickpick is customized in **Setup > Quickpicks > General > Email Subject**.*
8. Click into the large white text box of the e-mail window and type the body of your e-mail, or optionally insert a custom merge letter.
9. **[Optional]** Format the body of the e-mail by using the formatting tools at the top of your screen. Alternatively, highlight any text within the body of the e-mail, click your right mouse button, and choose **Font**.
10. When finished, click the **Send** button, located at the top left-hand side of the window, to send the e-mail.

## Unit 3: Using the Calendar of Events

In this section, you will learn:

- Viewing Events in the Scheduler
- Grouping the Scheduler by Sales Rep, Etc.
- Filtering the Event Scheduler
- Using the Calendar Grid
- Adding a Note to the Calendar
- Viewing Events in a Venue Graph
- Adding a New Event from the Scheduler

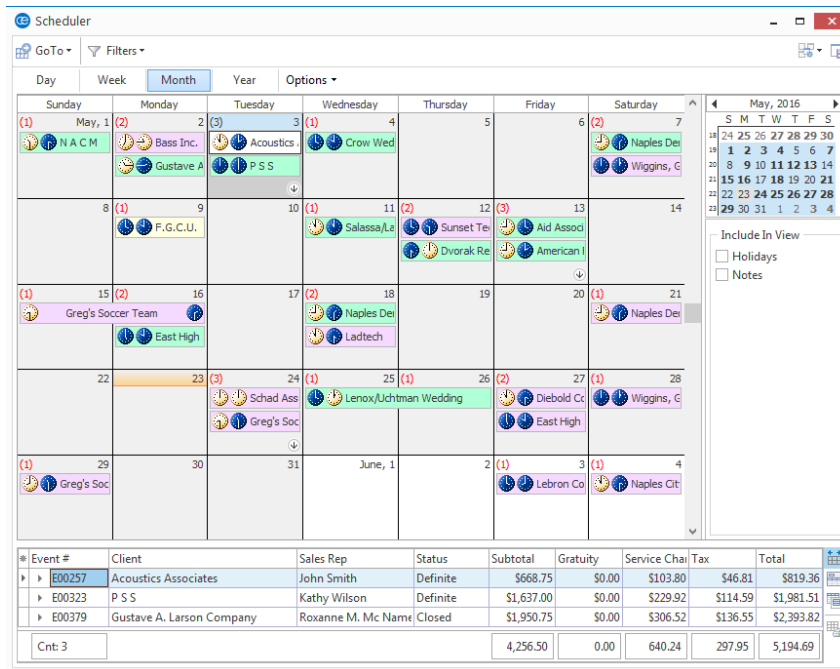


# Using the Scheduler

The Scheduler is your calendar of events in Caterease. You can view events in a day-at-a-glance, week-at-a-glance, month-at-a-glance, or even year-at-a-glance format, and you can even group events onto separate calendars based on details such as Sales Rep, Business Type, Theme, etc.

## Viewing Events in the Scheduler

1. Click the **Main** sidebar group on the left-hand side of your Caterease screen (if it is not already selected).
2. Click the **Scheduler** button.  
**Result:** The Scheduler window opens.



3. Click the **Day**, **Week**, **Month**, or **Year** button at the top left of the Scheduler window to switch among those views.  
**Note:** When you switch to Year view, the Scheduler places you on January 1 of the current year (as a default). To avoid confusion, you may want to click on the current date in the Scheduler before switching to another view.
4. **[Optional]** Adjust various options available at the top of the Scheduler in each View, according to the list below:

### Day View Options

Field	Description
Show As > Day View	This is the default view, and shows events in bars vertically down the screen with times of day along the left side.
Show As > Time View	This view shows events in bars horizontally across the screen with times across the top.
Options	The choices here vary, depending on whether you are showing Day View or Time View (above):

Field	Description
	<p><b>Day View Options:</b></p> <ul style="list-style-type: none"> <li>Time Ruler Minutes Alternatively shows or removes any time increments along the left side of the calendar other than the hour. (See "Time Unit," below.)</li> <li>Day Header Alternatively shows or removes the header showing day and date above the event information on the Scheduler.</li> <li>Work Times Only Toggles between showing all times of day or only the hours designated as your work time.</li> </ul> <p><b>Time View Options:</b></p> <ul style="list-style-type: none"> <li>Work Times Only View only your established Work Times.</li> <li>Show Event Detail Alternatively shows or hides the details of each event in the horizontal bars on the screen.</li> </ul>
<b>Time Unit</b>	Choose a time increment for this view from the options listed, or use the "Time Zoom In" and "Time Zoom Out" buttons to the right.

### Week View Options

Field	Description
<b>Show As &gt; Full Week</b>	This is the default view, and shows events in a standard week layout, with six boxes, one of which combines the two weekend days.
<b>Show As &gt; Work Week</b>	This view shows whatever days you have designated as your "work week" as columns across the screen - with events displayed vertically down the screen and times along the left side.
<b>Options</b>	<p>The choices here vary, depending on whether you are showing Full Week or Work Week view (above):</p> <p><b>Full Week View Options:</b></p> <ul style="list-style-type: none"> <li>Single Column Display Switches between showing the six day "boxes," described above, in one column or in two.</li> <li>Hide Weekend Alternatively hides or shows the weekend days in the calendar.</li> <li>Show Time As Clock Alternatively hides or shows the small clock icons indicating Start and End times to the left of each event.</li> </ul> <p><b>Work Week Options:</b></p> <ul style="list-style-type: none"> <li>Time Ruler Minutes Alternatively shows or removes any time increments along the left side of the calendar other than the hour. (See "Time Unit," below.)</li> <li>Day Header Alternatively shows or removes the header showing day and date above the event information on the Scheduler.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>Work Times Only</li> </ul> Toggles between showing all times of day or only the hours designated as your work time.
Time Unit	Choose a time increment for this view from the options listed, or use the "Time Zoom In" and "Time Zoom Out" buttons to the right.

### Month View Options

Field	Description
Options > Compress Weekends	Optionally combines Saturdays and Sundays into one box and column in the calendar display.
Options > Hide Weekend	Alternatively hides or shows the weekend days in the calendar.
Options > Show Time As Clock	Alternatively hides or shows the small clock icons indicating Start and End times to the left of each event.

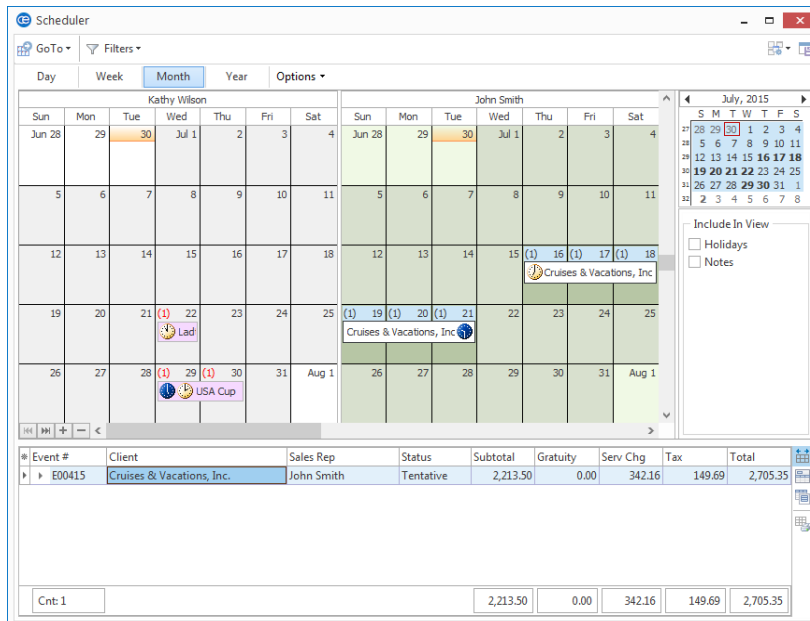
### Year View Option

Field	Description
Options > Event Counts Only	Toggles between showing a number in each date, indicating the number of events, or showing actual event details in each date. <i><b>Note:</b> Since "Year" view shows 365 days, it may be difficult to see many event details on smaller monitor displays.</i>

5. **[Optional]** Click into the checkbox labeled **Holidays** (right-hand side of the Scheduler) to show holidays on the calendar.
6. **[Optional]** Retrieve an event into Event Manager for editing or review by double-clicking or by right-clicking and choosing **Select**.

## Creating Separate Calendars for Sales Reps, Business Types, Etc.



1. With your Scheduler open, click the down arrow to the right of **Group By** in the **Home** ribbon tab at the top of your screen.
2. Choose **Sales Rep** or other option to group events by.  
**Result:** Your calendar is separated into groups based on the detail you've chosen.  
**Note:** The name of each group is shown at the top of each calendar.



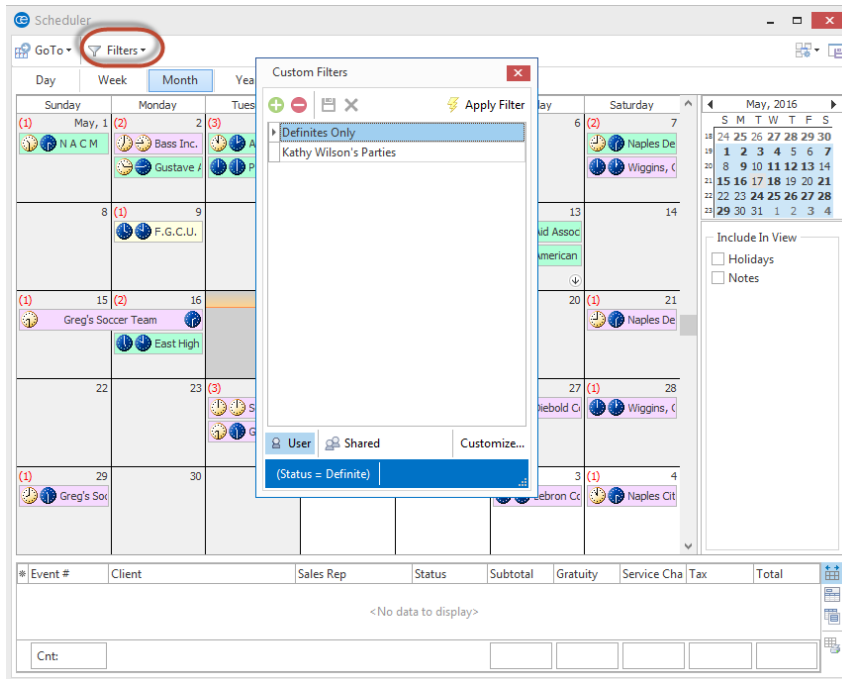
3. **[Optional]** Click the **Day**, **Week**, **Month**, or **Year** button at the top left of the Scheduler window to change the view for your calendars.
4. **[Optional]** Click the small plus or minus sign button at the bottom left of the window to see more or fewer groups, respectively.  
**Note:** Not available in Year view.
5. **[Optional]** Click the **Active Group** button in the **Home** ribbon tab at the top of your screen, and use the list to toggle among your various separate calendars.  
**Note:** Not available in Year view.

## Creating Filters in the Scheduler

You are able to set as many custom filter options as you want (Standard and Professional Versions), allowing you to select only the view of data that you desire when the Scheduler first loads.

1. Access your Scheduler (**Main** sidebar > **Scheduler**).
2. Click the **Filters** button, located on the upper left-hand side of your screen, > **Show Current Filter** to view your current filter status.
3. Edit your filter by clicking the **Customize** button, located on the bottom right-hand side of Custom Filters window.
4. Click **OK** to run the filter.  
**Result:** *The Scheduler instantly updates, and the current filter displays on the bottom left-hand side of the Scheduler window.*
5. To add the new filter as a saved filter, click the **Filters** button, located at the top left-hand side of your Scheduler window.
6. Click **Customize**.  
**Result:** *The Custom Filters window opens.*
7. Click the **Add Filter** button  to add a new filter.  
**Result:** *A new line, titled "New Filter," is added to the bottom of the list.*  
**Note:** *If you want to share the filter with other users in your network, click the **Shared** button, located at the bottom of the Custom Filters window.*
8. Type the filter name into the field provided, and then click the **Save Current Filter** button  to save the filter.  
**Result:** *From this point on, the newly created filter will be visible in the **Filters** drop-down list, accessed in Step 2, above.*


### Unit 3: Using the Calendar of Events



**Tip:** Click the **Save Current Window Settings** button to save an active filter as your default view when you first open your Scheduler.

## Using the Calendar Grid

The detail grid located at the bottom of the Scheduler window lists details of all events on any day or group of days highlighted in the calendar. In the Event display, the grid lets you choose details to review about events, and then a secondary grid allows you to see specific sub-event details. In the Sub-Event display, the main grid defaults to reflect sub-event information.

Note: The grid should be visible at the bottom of the Scheduler, by default. If it is not, hover your mouse along the bottom frame of the Scheduler to view the thin expansion tool . Click the expansion tool to open the grid area, or drag the tool and frame edge to stretch the grid area out.

### Viewing and Customizing the Detail Grid

1. Open the Scheduler in the **Event** or **Sub-Event** Display.

**Note:** Click the **Display** button in the **Home** ribbon tab to switch among displays.

**Tip:** Details in this grid can be sorted, grouped, printed, and exported.

2. Click on a day in the calendar to select it, or hold your mouse cursor down and drag over several days.

**Results:** Details of events on that day are displayed in the grid at the bottom of the Scheduler.

3. **[Optional]** Click the expand button to the left of any event in the grid to display a secondary grid containing sub-event details for that event.

* Event #	Client			Sales Rep	Status	Subtotal	Gratuity	Serv Chg	Tax	Total
▲ E00417	David Ames & Associates			Roxanne M. Mc Name	Tentative	514.25	0.00	67.08	30.75	612.08
▶	* Start	End	Room	Setup Style	Description	Date	Planned	Actual	Setup	Tear Down
	11:00 AM	02:30 PM	Meeting	Classroom	Luncheon Served	6/21/2015	15	15	01:00	00:30
▶ E00403	Wiggins, Goodlette & Davis P.A			John Smith	Tentative	294.50	0.00	47.12	20.62	362.24
▶ E00384	Natasha White			Roxanne M. Mc Name	Definite	5,455.00	0.00	872.80	381.85	6,709.65
Cnt: 3						6,263.75	0.00	987.00	433.22	7,683.97

4. Choose columns to display by clicking the **Quick Column Customizing** button  at the top left of the grid (or secondary grid) and clicking into the checkbox of any field.

**Result:** Details with checks will appear in the grid.

5. **[Optional]** Click on any column heading to sort records in the grid by that detail in ascending order; click again to sort in descending order.

6. **[Optional]** Color-code the grid as desired by right-clicking within the grid, choosing **Color Grid By**, and selecting an option.

7. Click the **Save Window Settings** button  at the top right of the Scheduler window to save the changes you've made for future use.


## Adding a "Note" to a Calendar Date

You can create a "note," attached to any date on your Caterease calendar (Scheduler), to hold a date or otherwise indicate important information that needs to be shared.

### Creating a Calendar Note

1. From the Scheduler (**Main sidebar > Scheduler**), click into the **Notes** checkbox, located along the right-hand side of the window, if it is not already selected.

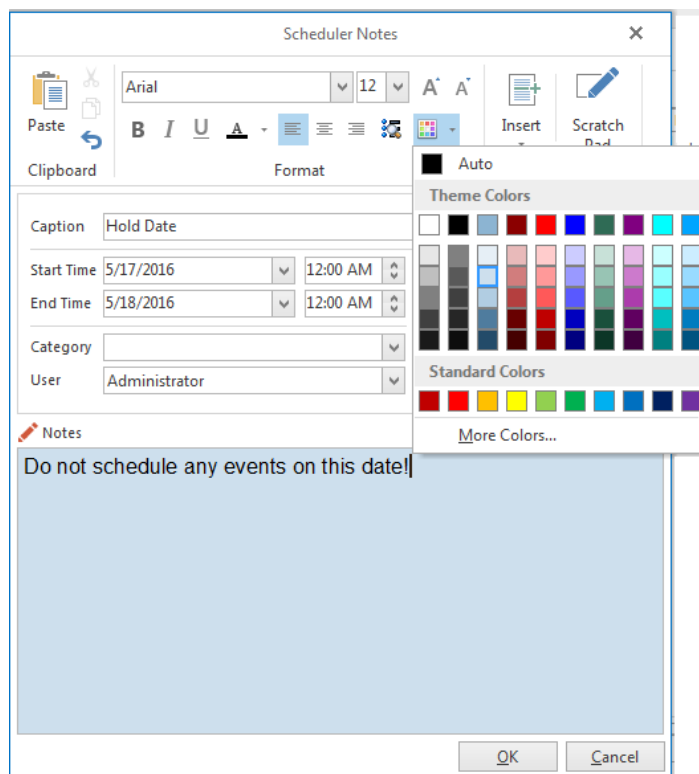
**Note:** To have this option remain selected by default on your personal Scheduler, click the **Save Win-**

**dow Settings** button  at the top right of the window. To make these the default settings for all Caterease users on your network, click the **Settings** button, located in the **Home** ribbon tab at the top of your screen, and choose **Shared > Save > Current Window**.


2. Click your right mouse button into a date on the calendar where you would like your note to appear.

3. Choose **New Note**.

**Result:** The Scheduler Notes window opens.



4. Type a caption for your new note into the Caption field, or choose one from your custom quickpick list .
5. **[Optional]** Change the Start Time or End Time of the note, if desired, by clicking the up-and-down arrows to adjust the time or by typing directly into the fields.

6. **[Optional]** Assign a category to the new note, for future tracking, by clicking the down arrow to the right of the Category field and selecting a quickpick item (or you may type directly into the field).
7. **[Optional]** Change the user name for the note by clicking the down arrow to the right of the User field and selecting an option.  
**Note:** This indicates the user who created the note. Notes will be visible to all users who have the **Notes** checkbox selected (Step 1, above).
8. Click into the **Notes** text box and type details of your note, using the formatting tools above the box to change font style, size, color, or to make the text bold, italic, or underlined.
9. **[Optional]** Click the down arrow next to the color icon  to choose a different color for your note.  
**Note:** You can also click the **More Colors** button to create a custom color.
10. When finished, click **OK**.

**Tip:** Note Caption quickpicks are established here: **Setup > Quickpicks > Scheduler > Note Caption**. Note Category Quickpicks are established here: **Setup > Quickpicks > Scheduler > Note Category**.

## Using a Venue Graph

The Scheduler tool allows you to view your various parties in a graph format, grouped by banquet room, site location, or a variety of other details. You are even able to edit the parties by dragging and dropping from one group to another, stretching or shrinking start/end times, setting display fields, etc.

### Viewing Events Graphed by Room, Site Location, Etc.

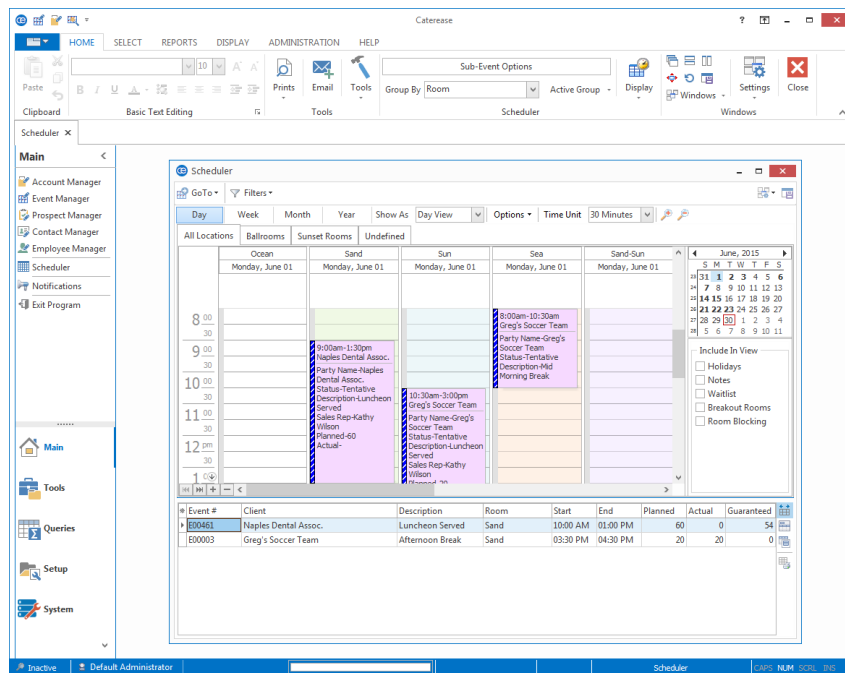
1. With your Scheduler open, click the **Home** ribbon tab at the top of your screen (if not already selected).

2. Click **Display > Sub-Events**.

**Result:** The Scheduler changes to Sub-Event view, which (by default) is displayed as a rooms graph for the current day (columns with room names across the top and times down the left).

**Note:** In this Day View display, you can choose **Show As > Time View** to show bars horizontally across the page, rather than vertically.

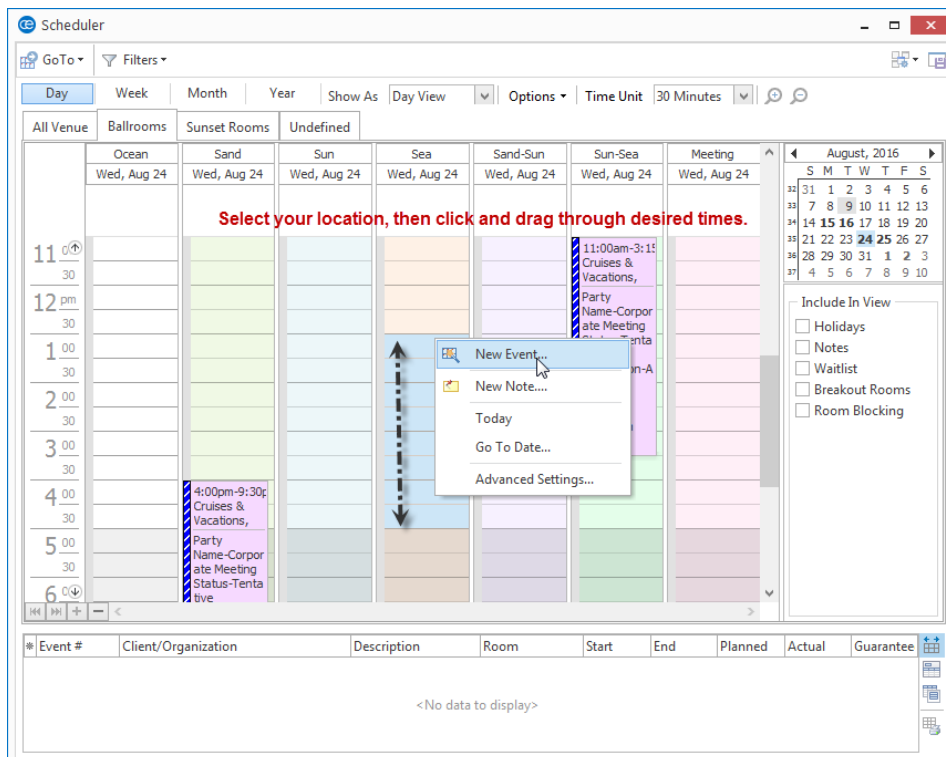
**Tip:** You can drag and drop event bars from one "room" (or "site name," etc.), to another - or hold your left mouse button down on the top or bottom edge and stretch and shrink bars to change start and end times. You can even hold your **[Ctrl]** key down on your keyboard and select multiple dates to view simultaneously, then drag and drop parties from one date to another. These changes affect events everywhere throughout the program, and can be "disallowed" for all users through Advanced Settings.



3. **[Optional]** Click the down arrow next to **Group By**, in the **Home** ribbon tab at the top of your screen, and choose **Site Name**, **Business Type**, or a detail other than **Room** to group your events.
4. **[Optional]** Change the view of this calendar to **Week** or **Month** view by clicking the respective buttons at the top left of the window.
5. **[Optional]** Click the small plus or minus sign button at the bottom left of the Scheduler window to see more or fewer groups (rooms, etc.), respectively.

## Adding an Event From the Scheduler

1. With your Scheduler open, group your Sub-Events calendar as described in "Viewing Events Graphed by Room, Site Location, Etc.," above.
2. Find a specific time and date that you would like to hold your new event.
3. In the appropriate group for your new event, hold your left mouse button down on the Scheduler screen at the time you want your new event to start.
4. Drag your left mouse button down until you reach your desired end time, and then release your mouse button.
5. Click your right mouse button and choose **New Event**.  
**Result:** A confirmation message appears.



6. Click **Yes**.  
**Result:** The Event Wizard opens, on Step 1.
7. Select a customer for your new event in Step 1 of the Event Wizard.
8. Click **Next** at the bottom right of the Event Wizard to move to the default Step 2 of the Event Wizard, or click the down arrow to the right of the **Next** button and choose an alternative Wizard for this party.  
**Result:** Step 2: Select Event Fields opens, with information you highlighted (date, optional times and/or venue), filled in by default.
9. Continue to fill out other details in the Wizard as desired.




## Unit 4: Advanced Menu Management

In this section, you will learn:

- Adding a Custom Menu Item to an Event
  - Retrieving Menu Item Packages
  - Modifying Menu Item Descriptions
- Including Menu Item Modifications on Prints
  - Separating Menu Items Based on Type
  - Using the Quick Item Insert Feature
- Incrementally Searching for Menu Items
  - Managing Event Required Items













## Adding a Custom Menu Item to an Event

1. Confirm the **Food/Service** tab is currently selected at the bottom of your **Sub-Event** display in Event Manager.
2. Click the **Add A New Food/Service Item** button  , located on the right-hand side of the **Food/Service** tab.

**Result:** A blank line is added to the bottom of your **Food/Service** grid.

**Note:** As an alternative, you can click the **Insert a New Food/Service Item** button  at the right-hand side of the **Food/Service** tab to insert a new blank line ABOVE the menu item currently selected in the grid.

* Item Name	Price	Qty	Total	Type
Chef's Table Buffet	\$22.95	25	\$573.75	
Soft Drinks	\$1.95	60	\$117.00	
I Chocolate Cake		25	\$0.00	 ▼

-  Food
-  Beverage
-  Liquor
-  Equipment
-  Labor
-  Room
-  Other


Description	Chocolate Cake
-------------	----------------

- Click into the **Item Name** column and type a name for the new menu item.
- Press your **[Tab]** or **[Enter]** key.  
**Result:** *Your information is stored and your cursor moves to the next column, the **Price** column.*
- Type a price for the item, and press **[Tab]** or **[Enter]**.  
**Result:** *Your cursor moves to the next column, the **Qty** column.*  
**Note:** *Rather than typing a price, you can click the down arrow at the right of the **Price** column to access the drop-down calculator.*
- Type, into the Qty field, the appropriate quantity for the menu item.  
**Note:** *A drop-down calculator is available for this field, as well.*  
**Note:** *If, when you clicked the **Add A New Food/Service Item** button in Step 2, above, you had a menu item highlighted whose quantity was linked to the party's guest count, your new item will default to being linked as well. Right-click on the item and choose **Special Editing > Link/Unlink Qty to Guest Count** to unlink it.*
- Click into the column with the small image on the far right-hand side of the grid, and click the down arrow to choose the appropriate Type for the new item.  
**Note:** *The Item Type of new items defaults to the Item Type of whatever item was highlighted when you clicked the **Add Record** button in Step 2, above. "Item Type" is from a hard-coded list; however, "Category" is a custom list that can be used to further classify items.*
- [Optional]** Hold your left mouse button down on the new item you have added and drag it up or down into a different position in the list.

**Note:** *You cannot drag and drop an item if the Food/Service column has been sorted; you will be prompted to clear column sorting.*

9. **[Optional]** Create a detailed "Description" for the new item as described under "Modifying an Item's Default Description, Instructions, Label, and Other Details," below.

## Retrieving Menu Item Packages

1. From the **Sub-Event** display, Food/Service grid in Event Manager, click the **Display Menus** button , located on the right-hand side of the window.

**Result:** The Select Menu Items For Current Event window opens.

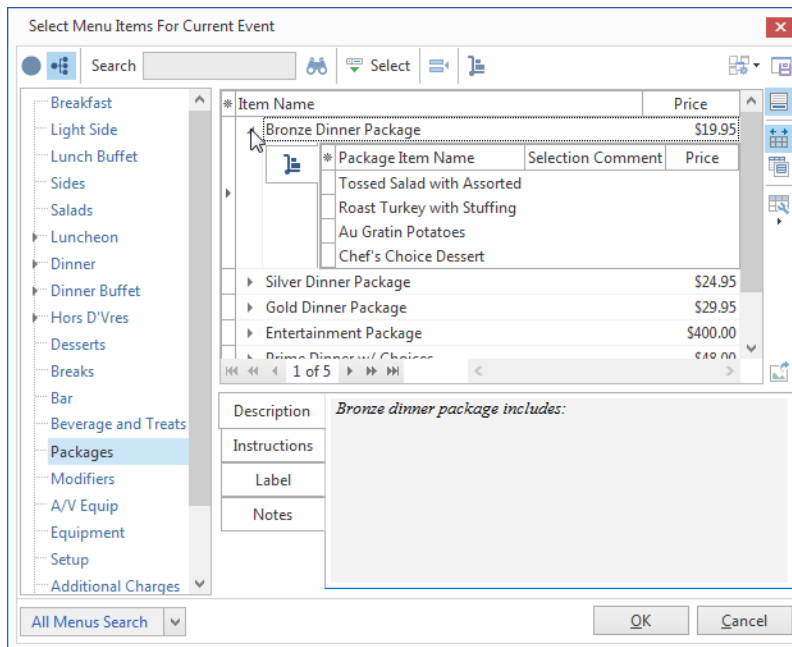
2. Select a menu title on the left-hand side of the Select Menu Items For Current Event window.

**Result:** The items on that menu are listed in the right pane of the Select Menu Items For Current Event window.

**Note:** Menu packages are indicated by an expand button to the left of the item name, and can be set up in Menu Manager. You can click this expand button to view "sub-items" within the package.

3. Click the **Menu Packaging** button , found at the top of the Select Menu Items For Current Event window.

**Note:** This button is a toggle; click it again and the feature is disabled.



**Tip:** Clicking your right mouse button on the Select Menu window gives you the options of **Select All Records** and **Clear Selected Records**. If Menu Packaging is enabled on the menu selection screen, and if your cursor is on a top-level menu item (i.e., not the sub-items included in a menu package), then **Select All Records** will highlight all top-level items and also any related sub-items. If Menu Packaging is not enabled, only the top-level items (and not the sub-items) will be selected. Likewise, if you have a sub-item in a menu package highlighted, the **Select All Records** option will highlight all sub-items in that package only, regardless of whether or not Menu Packaging is enabled on the menu selection screen.

4. **[Optional]** Click the expand button to the left of the menu package item to review sub-items, and hold your **[Ctrl]** key down and click any sub-items to de-select them.  
**Result:** The sub-items you click are no longer highlighted, and thus will not be retrieved into the event.  
**Note:** If you click on a sub-item without holding your **[Ctrl]** key down, it will become the only highlighted sub-item in that package.
5. Double-click any menu package item (indicated by the presence of an expand button to the left of an item name) to select it.  
**Result:** The item and all of its sub-items are deposited on your event's **Food/Service** tab. Prices, costs, and other details are only retrieved for each "sub-item" if the package is set up that way in your default menus.

**Note:** *You can also drag and drop multiple menu package items, use the **Select Items** or **OK** buttons, and any other selection technique described in the topic above.*

# Modifying an Item's Default Description, Instructions, or Other Details

1. Select any menu item on the **Food/Service** tab.
2. Click either the **Description, Instructions, Label, Notes, or Modifications** tabs.  
**Result:** The selected tab is displayed.

**Tip:** If you're not happy with your modifications and want to change your edits back to the menu item's default, right-click inside the text block and choose **Reset**.

Event Manager: Naples City Police Department # E00382

Go To: 6/16/2016

**Client Information**

Client: Naples City Police Department  
 Address: 100 3rd st. S  
 Naples, FL 34102  
 Telephone: (239) 777-1234  
 Fax: (239) 855-6333

**Financials**

Subtotal	\$785.00
Serv Chg	\$125.60
Tax	\$54.95
Total	\$965.55
Cost Per Guest	\$1.23

**Event** | **Sub-Event**

**Description** Luncheon Served  
 Date: 6/3/2016 (Fri)  
 Start: 05:00 PM  
 End: 08:00 PM  
 Setup Style: Banquet  
 Room: Ocean

Item Name	Price	Qty	Total
1 Chef's Table Buffet	\$22.95		\$0.00
Soft Drinks	\$1.00	50	\$50.00
Chocolate Cake	\$5.95		\$0.00

**Description** Chef's Table Buffet  
**Instructions** includes: Italian mostaccioli, baked chicken, sage dressing, whipped potatoes and gravy, vegetable du jour, tossed salad, potato salad, cole slaw, rolls and butter, dessert, coffee, tea or milk.

**Label**  
**Notes**  
**Modifications**  
**Picture**

Food/Service | **Staffing** | Comments

3. Click into the text box and start typing, or press your **[Backspace]** key to edit.  
**Result:** The background of the text block changes to white, and the text will reflect your changes.  
**Note:** You can also click your right mouse button in the text box and select **Modify**. See the topic below about noting modifications to kitchen and other staff.

4. Format text by highlighting and using the Basic Text Editing tools .  
**Note:** The Format toolbar will not be enabled unless you have begun editing the text as described in Step 3, above.

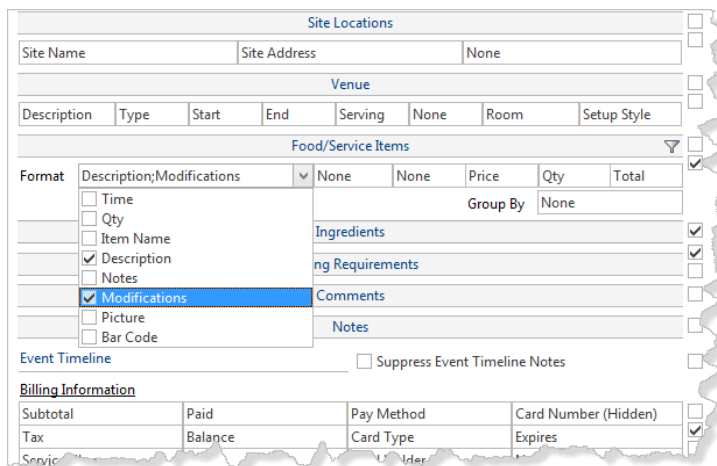
5. Click on the **Picture** tab to optionally add or modify a digital image of your menu item.

**Tip:** Click the **Modifications** tab and make a note of the changes you've made to pass along to your staff on a back-of-house print.  
**Note:** See topic below about including this detail on a print.

## Including Item Modifications on Prints

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.
2. Click the **Print Designer** button.  
**Result:** The Print Designer window opens.
3. On the left-hand side of the window, click the title of the print you want to add item Modifications to.
4. In the Food/Service Items section of the print, click the down arrow next to **Format**.  
**Result:** A drop-down list of options appears.

**Tip:** Menu Item Modifications can be included in Marketing Tools merge documents, as well, using the [Food/Service Merge Table option](#).



The screenshot shows the Print Designer interface. The 'Food/Service Items' section is active. The 'Format' dropdown menu is open, displaying a list of options: Time, Qty, Item Name, Description, Notes, Modifications (checked and highlighted in blue), Picture, and Bar Code. The 'Modifications' option is selected. The 'Event Timeline' section is also visible, with a checkbox for 'Suppress Event Timeline Notes'.

5. Click into the checkbox next to **Modifications**.  
**Note:** Any option with a check in the box will appear on the print.
6. When finished, close Print Designer and save your changes.

## Separating Event Menu Items Based on Type

1. 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).

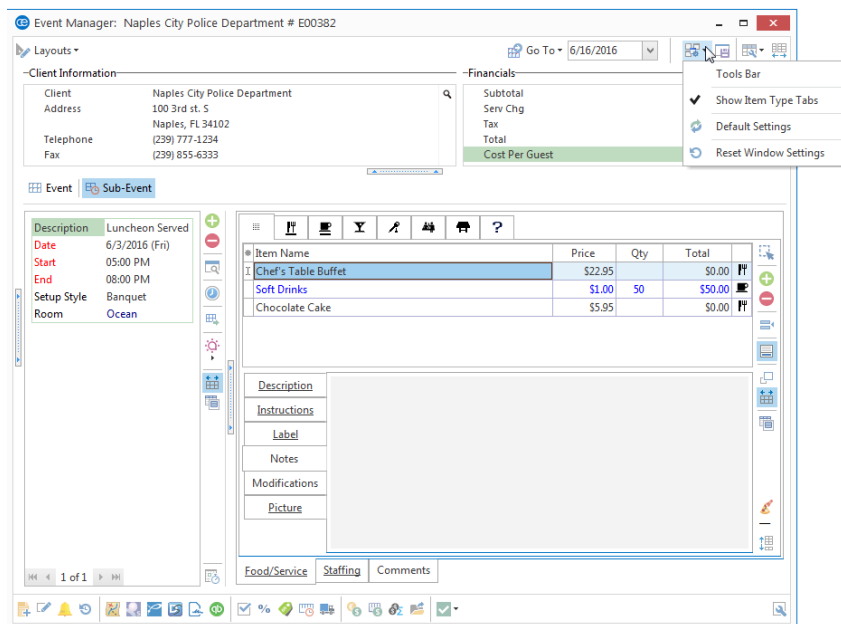
**Note:** If you retrieve additional items into the event, you will be automatically placed on the All Items tab that lists all items for the event.

**Tip:** Item types are set in **Administration > General > Food/Service Item Types**. Here you are able to add one additional Item Type to the seven existing Item Types.

2. [Optional] From the **All Items** view (the default view) click on the **Food Items**

tab  to view types that have been designated Food.

3. [Optional] Click on the other item tabs (Beverage Items; Liquor Items; Equipment Items; Labor Items; Room Items; Other Items) to filter each item separately.



## Using the Quick Item Insert Feature (Professional Version)

1. Click on the bottom item in the grid on the event's **Food/Service** tab.

2. Press the **[Down Arrow]** key on your keyboard.

**Result:** A new blank line is added to the **Food/Service** tab, and your cursor is positioned in the Search Menu Items field.

3. Type an item name as desired.

**Result:** A drop-down grid appears, scrolling to a match as you type.

**Note:** Enable the Quick Item Insert Feature in **Global Settings > Managers tab > Enable Quick Item Insert**.

**Tip:** This feature is available on Menu Items, Recipe, and Required Items areas of Menu Manager (as well as here in Event Manager), on the Food/Service tab and the New Food/Service window.

The screenshot displays the 'Event Manager' window for 'Naples City Police Department # E00382'. The 'Sub-Event' tab is active. On the left, event details are listed: Description (Luncheon Served), Date (6/3/2016 (Fri)), Start (05:00 PM), End (08:00 PM), Setup Style (Banquet), and Room (Ocean). The main area shows a table of items with columns for Item Name, Price, Qty, and Total. The 'Search Menu Items' field contains the text 'chi'. A dropdown menu is open, showing a list of items including 'Baked Chicken with Stuffing' (Dinner, \$65.46), 'Chicken Breast Supreme' (Lunch, \$4.00), and 'Chicken Breast Supreme' (Dinner, \$7.52 and \$8.28). The 'Food/Service' tab is selected at the bottom.

4. When you find your match, press the **[Enter]** key on your keyboard.


**Result:** The item and all of its details are retrieved into the event.

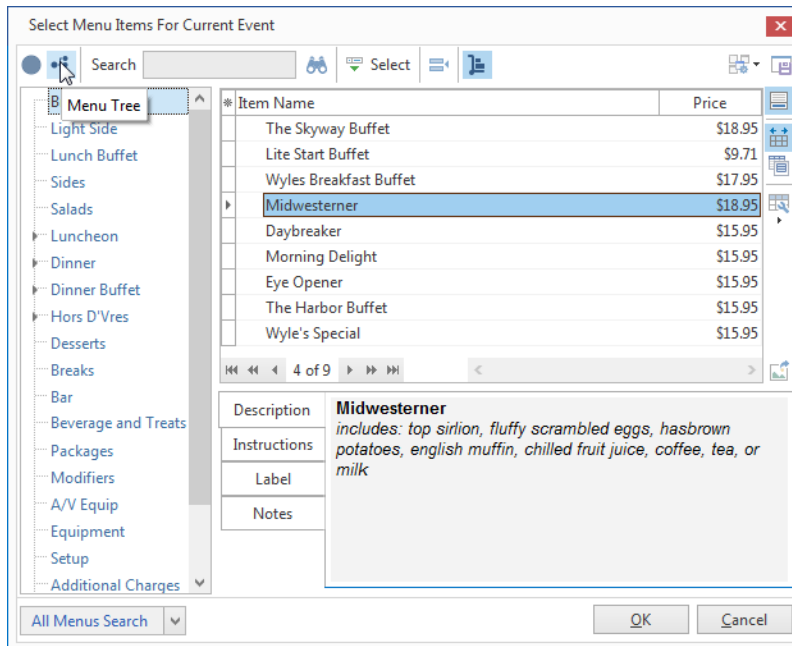
**Note:** If no match is found, type the name of the new item and its details ("Price," etc.) and it will be added as a custom item to this event.

5. Enter a quantity for the item in the Qty column.


6. Edit other details as desired.

# Incrementally Searching Using the All Menu Search Feature

1. On the **Sub-Event** display in Event Manager, click the **Display Menus** button , located at the right-hand side of the **Food/Service** grid.  
**Result:** The *Select Menu Items* window opens.
2. Click the down arrow to the right of the All Menu Search field to access a fully customizable Search Menu Items selection window.  
**Note:** All Menu Search is only available in Menu Tree mode; it is not available in the All Menu mode.





3. Begin typing the name of the item you would like to search for into the field, and you will be taken to all highlighted menu items in the appropriate menu or sub-menu.

**Note:** This tool searches within each visible field, so you will want to click the **Quick Column Customizing** button , located to the left of the Item Name field, to enable additional columns, if necessary.

4. **[Optional]** Click the **All Menus** button to view your entire list of menu items.


## Unit 4: Advanced Menu Management

Select Menu Items For Current Event

Search   Select 

All Menus	Price
Midwesterner	\$18.95
Daybreaker	\$15.95
Eye Opener	\$15.95
Morning Delight	\$15.95
Wyle's Special	\$15.95
The Skyway Buffet	\$18.95
The Harbor Buffet	\$15.95
Lite Start Buffet	\$9.71
Wyles Breakfast Buffet	\$17.95
Continental Breakfast	\$10.36
Cheese and Fruit	\$2.00
Coffee And...	\$6.94
Coffee	\$7.00
Brewed decaffeinated coffee	\$7.00
Hot/Iced tea	\$6.40
Hot Chocolate	\$6.08
Hot Apple Cider	\$6.30
Mineral Water	\$1.00

1 of 462



All Menus Search  

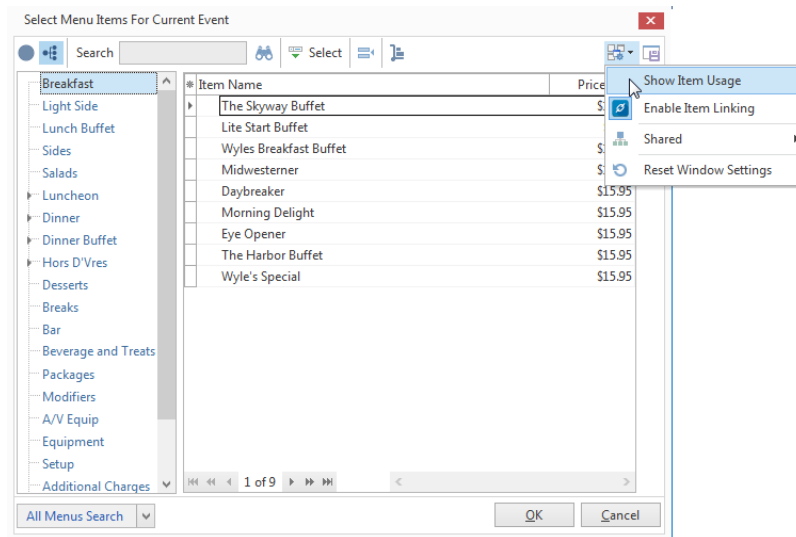
OK Cancel


# Viewing and Editing Item Usage When Building Event Menus

Sometimes it is easier for your chef to simply make more of a menu item he is already making than to create a whole new menu item from scratch. The Professional Version of Caterease lets you view how many of each menu item have been ordered during the day(s) surrounding a particular party.

## Viewing Menu Item Usage

1. Click the **Sub-Event** tab from an event in Event Manager.
2. Click the **Select Menus** button , located on the right-hand side of the window.  
**Result:** The *Select Menu Items For Current Event* window opens, displaying your default menus and default menu items.
3. Click the **Settings** button , located on the upper right-hand side of the window, and choose **Show Item Usage**.  
**Result:** The **Usage** column displays on the window, indicating the menu item usage in the day or days surrounding this event.



4. **[Optional]** Click on a menu item in the grid, then click the **Booked Menu Items** button , located on the right-hand side of the window.  
**Result:** The *Booked Menu Items* window opens, where you can view which other parties are calling for the selected item.

## Unit 4: Advanced Menu Management

Booked Menu Items: The Skyway Buffet


Select Usage Date Range: 6/17/2016 - 6/27/2016

* Event #	Event Date	Status	Menu Item Name	Qty	Price	Total
E00403	6/18/2016	Tentative	The Skyway Buffet	20	\$18.95	\$379.00
E00417	6/18/2016	Tentative	The Skyway Buffet	5	\$18.95	\$94.75
E00478	6/22/2016	Tentative	The Skyway Buffet	100	\$18.95	\$1,895.00

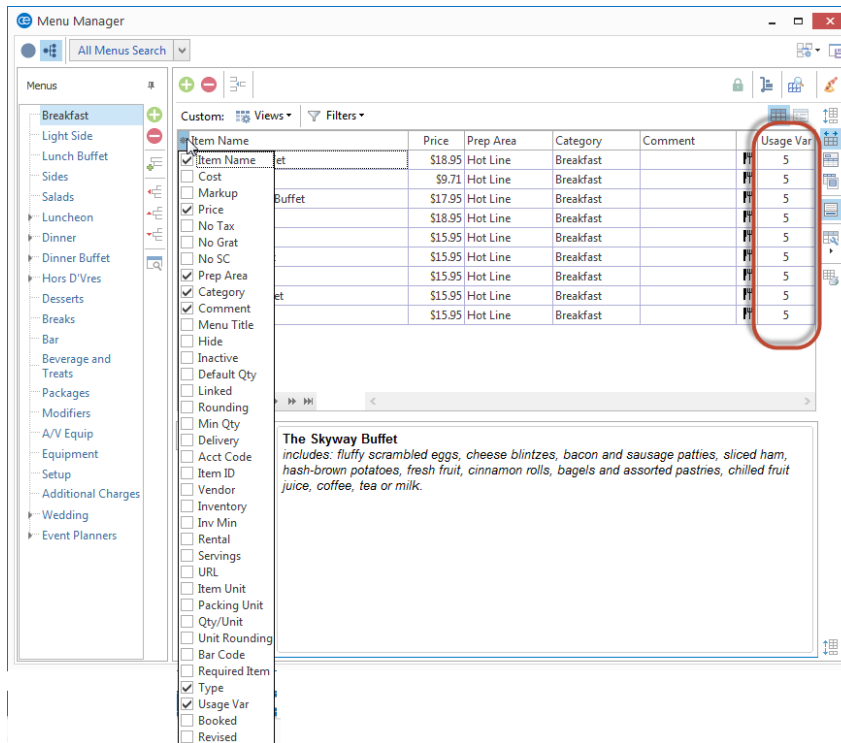
Cnt: 3 125 2,368.75

5. **[Optional]** Click on a menu item in the grid, then click the **Select** button, located on the upper left-hand side of the window, to go to the event.

## Establishing Usage Variance

1. Click the **Setup** sidebar and choose **Menu Manager**.
2. From your Menu Manager main screen, click the **Quick Column Customizing** button  to add the **Usage Var** column to your grid.

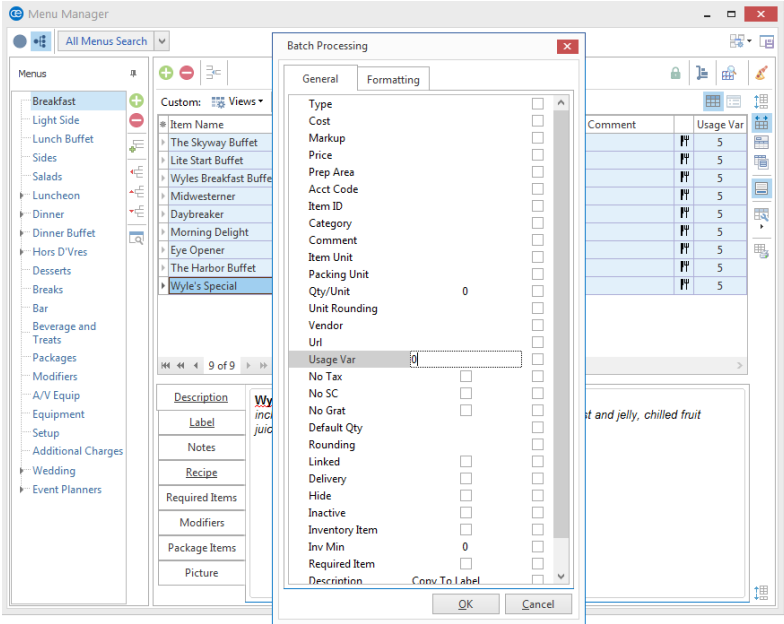
**Note:** Click the **Save Current Window Settings** button  if you would like to retain this column in your default view.



3. Type the variance into the Usage Var field.  
**Note:** To arrive at the Usage Variance number, look at the number of days either side of an event (before or after) you would like to account for. For example, type the number 1 into the Usage Variance field if you want to account for events one day before the current event's date and one day after the current event's date. The Usage Variance field is used to calculate your **Usage Date Range**. Enter "0" if you only want to track menu item usage on the specific day of the party.
4. To create a Usage Variance for all items in the list, you can highlight all items, right-click, and select **Special Editing > Batch Processing**.

**Tip:** An item's Usage is the number of the particular item that was booked in any active event (not "Cancelled," and with an "Included" sub-event within your established Usage Date Range).

Unit 4: Advanced Menu Management



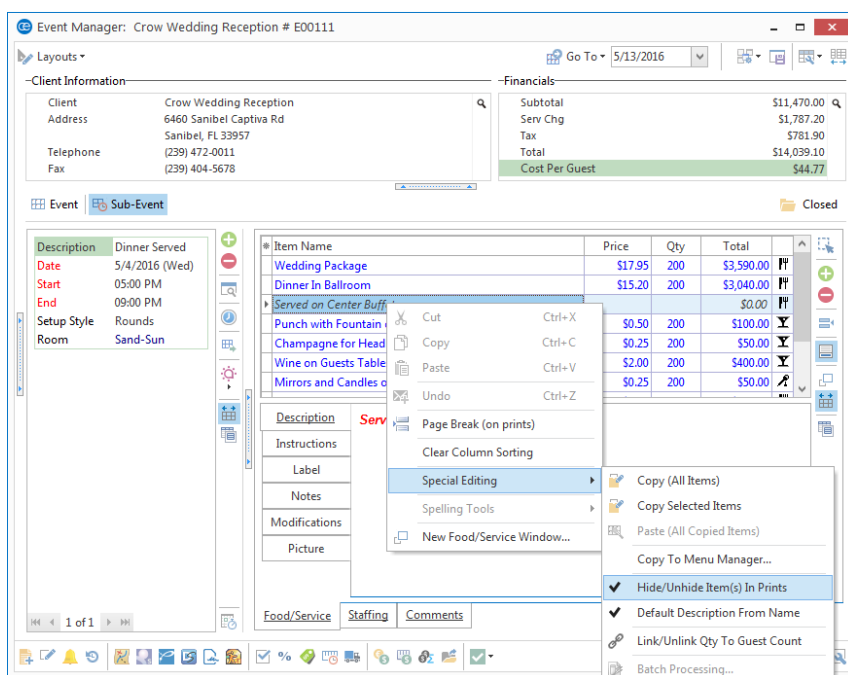
## Using Item Hiding

Menu item hiding is basically a technique for you to pass notes to your kitchen or other back-of-house staff. For example, imagine a customer requests “no garlic” on a particular menu item. In addition to removing garlic from that item’s Description or Ingredients List, you may want to make an obvious note that the chef is sure to see. However, that type of note would probably look tacky on a customer’s contract. So, you can create the note as you want — perhaps big, bold letters that read NO GARLIC — and then hide it on one print and include it on the other.

### Establishing an Item as Hidden in an Event

1. Open an event in Event Manager.
2. Click the **Sub-Event** button to view the Sub-Event display.
3. Right-click the item on the **Food/Service** tab that you want to hide.  
**Result:** A pop-up menu appears.
4. Select **Special Editing > Hide/Unhide Item(s) in Prints**.  
**Result:** The item becomes italicized to indicate that it will be hidden on any prints that allow item hiding (see “Setting Up a Print to Hide Items,” above).

**Tip:** You can establish menu items to be hidden as a default. For example, you can create a menu called “Modifiers” and populate it with such instructions as “No Onions,” “Extra gravy,” etc., each of which is hidden automatically when you pull it into an event.



### Setting Up a Print to Hide Items

1. On any print in your Print Designer, click into the checkbox labeled **Allow Food/Service Item Hiding**, located midway down the print, on the right.  
**Result:** Any menu item designated as “hidden” in an event will not appear on this print.  
**Note:** To see the label of a checkbox, float your mouse pointer over it without clicking.

## Unit 4: Advanced Menu Management

**Print Designer**

**flavours**  
CATERING + EVENTS

*Sales /Catering Contract*

☐ Suppress Header Edit Header

Client Event Date Telephone Fax  
Address Booking Contact Site Contact Guests

Party Name Sales Rep Theme Category ☒

Edit Top Notes ☐ Suppress ☐ Show Allergy Alerts

**Site Locations**

Site Name Site Address None

**Venue**

Description Type Start End Serving None Room Setup Style

**Food/Service Items**

Format Item Name None None Price Qty Total  
Group By None


☒ Allow Food/Service Item Hiding

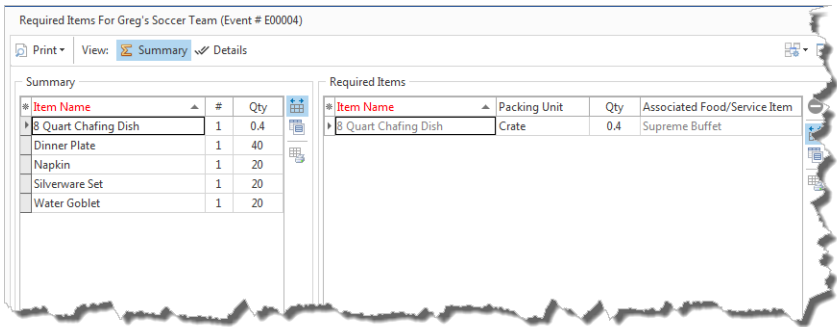
**Ingredients** ☒  
**Staffing Requirements** ☒  
**Comments** ☒  
**Notes** ☒  
**Event Timeline** ☐ Suppress Event Timeline Notes


2. Remove the check from the checkbox to have hidden items appear on the print.

# Managing Event Required Items

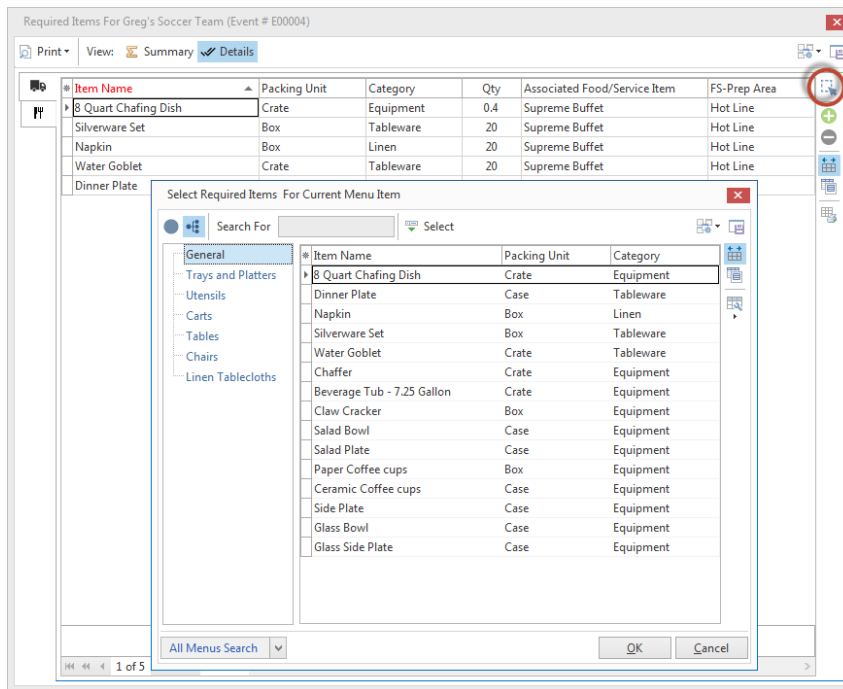
Caterease handles "required items" - serving utensils, equipment, etc., that is required to hold an event - in a couple of different ways. First, you can attach these items (things such as chafing dishes, dinner plates, wet-naps, claw crackers, etc.), to a menu item, so they are retrieved and even quantified automatically when that menu item is selected for an event. In addition, you can select "event required items," which are things not associated with any one specific menu item (for example, tables, tablecloths, etc.), using the steps outlined below.

- 1. In Event Manager, click the **Required Items** button  , located in the toolbar at the bottom of your screen.  
**Result:** The Required Items window opens, defaulting to Summary view.  
**Note:** The **Required Items** button can also be accessed from your **Tools** menu.
- 2. Required Items that have been associated with a menu item in Menu Manager display in the Summary view.



- 3. To add required items at the Event level, click the **Details** button.  
**Result:** The Details view displays.
- 4. Click the **Select Items** button  , located on the upper right-hand side of the Details view window.  
**Result:** The Select Required Items window opens.

## Unit 4: Advanced Menu Management



5. **[Optional]** Click on a title in the left pane of the window to choose a specific list of ingredients or required items.
6. **[Optional]** Click on a column heading in the grid (e.g., "Description") to sort items by that column, and then type into the Search For field at the top of the window to find an item.
7. Retrieve items in any of the following ways:
  - Double-click a single item to retrieve it.
  - Drag your mouse over several items to select them all, or hold the **[Shift]** or **[Ctrl]** key down on your keyboard as you click.
  - Drag and drop highlighted items from the Select Items window into the list you are currently editing.
  - Click the **Drop Items** button at the top left of the window to retrieve the currently highlighted item(s) and leave the window open.
  - Click the **OK** button at the bottom right of the window to retrieve the currently highlighted item(s) and close the window.
8. Click into the **Qty** column for the new item(s) and enter the appropriate quantities.
9. **[Optional]** Click the **Print** button, located on the upper left-hand side of the window, to print the Required Items List.

## Unit 5: Entering General Event Information

In this section, you will learn:

- Reviewing Event Manager Fields
- Customizing Quickpick Lists
- Renaming Fields
- Creating User Defined Fields
- Making Fields Required
- Establishing New Booking Defaults
- Adding/Changing Contact People
- Adding a Sub-Event (Meal)
- Using the Time Wizard
- Using the Mapping Interface
- Managing Multiple Events Simultaneously



## Reviewing Event Manager Fields

A multitude of fields are available to help you keep track of your events - and additional User-Defined Fields can be made up by you. These fields exist in Event Manager on either the Event or Sub-Event display. Below is a list:

### Event Fields

Field	Description
<b>Party Name</b>	Used to identify an event; especially helpful when one client has multiple events.
<b>Sales Rep</b>	Shows the sales representative responsible for the event.
<b>Theme</b>	Allows you to track events by theme; (e.g. "Wedding Reception," "Christmas Party," "Seminar").
<b>Reference</b>	Lets you track your company's various marketing strategies; shows why the client booked this event (how they heard of you).
<b>Category</b>	Gives you an extra field for categorizing and tracking events; can be renamed to suit your specific business needs.
<b>Booking/Site First</b>	Identifies the first name of the booking and site contact people for the event; usually these names are directly associated with the client, and can be selected instead of repetitively typed.
<b>Booking/Site Last</b>	Identifies the last name of the booking and site contact people for the event.
<b>Booking/Site Email</b>	Identifies the booking/site contact's e-mail address.
<b>Booking/Site Tel</b>	Identifies the booking/site contact's telephone number.
<b>Coordinator</b>	Allows you to identify an event coordinator.
<b>Primary Site Name</b>	Identifies the first active sub-event's Site Location.
<b>Primary Room</b>	Identifies the first active sub-event's Room.
<b>Event #</b>	Offers a unique identifier for the event; this number is automatically assigned by the program.
<b>Status</b>	Indicates the status of the event: Prospective, Definite, Tentative, Cancelled, or Closed.
<b>Cancel Type/Date</b>	Lets you track why and when you lost business; available as sub-fields as the Status field.
<b>Event Date</b>	Indicates the date on which this event will (or did) take place.
<b>Booked/Revised Date</b>	Allows you to track the date on which this event was booked, and when it was last revised; available as sub-fields of the Event Date field.
<b>Guests</b>	Does not allow data-entry; displays the Actual guest count if one exists, and the Planned or Guaranteed count if one does not.
<b>Planned</b>	Indicates the number of guests the customer is planning for the event.
<b>Actual</b>	Indicates the actual number of guests who attended (or will be attending) the event.
<b>Guaranteed</b>	Indicates the minimum number of guests the customer is guaranteeing for the event; can be an automatic percentage of the Planned guest count.
<b>Business Type*</b>	Allows you to categorize events based on differing business models or if your company does business as more than one enterprise.
<b>Subtotal</b>	Identifies the subtotal for the entire event.
<b>Gratuity</b>	Identifies the total gratuity for the entire event.
<b>Service Charge</b>	Identifies the total service charge for the entire event.
<b>Tax</b>	Identifies the total tax for the event.
<b>Total</b>	Identifies the event total, including tax and service charge.
<b>Cost</b>	Identifies the total cost (to you) of the event; includes cumulative costs of menu items, as well as staffing and any miscellaneous cost adjustments.
<b>Profit</b>	Identifies the total profit for an event.
<b>Paid</b>	Identifies the total amount paid for an event.
<b>Balance</b>	Identifies the currently outstanding balance for the event.
<b>Total Markup</b>	Identifies the total markup of an event, automatically calculated by multiplying cost by a markup rate you identify.
<b>Operation*</b>	Allows you to separate events based on DBA's, or different businesses or locations you

Field	Description
	might be running.
<b>Pay Method*</b>	Identifies how the customer will pay (or paid) for the event.
<b>Cancel Charge*</b>	Indicates the amount the customer will be charged if the event is cancelled.
<b>Members/Non-Members*</b>	Used by private clubs to distinguish between guest types; can be renamed to suit your needs (e.g. "Adults," "Children").
<b>PO Number*</b>	Identifies a purchase order associated with the event.
<b>Folio Number†</b>	Identifies a folio number associated with the event.
<b>Closed†</b>	Lets you track a closed date for the event; optionally allows you to lock users out of closed events.
<b>User Defined Fields†</b>	Allows you to create any additional fields you want to suit the specific needs of your company.
* Displayed on Miscellaneous tab by default	
† Not displayed by default	

## Sub-Event Fields

Field	Description
<b>Description</b>	Merges in the description of the event's first sub-event; e.g., "Dinner Buffet," "Meeting," "Breakfast," etc.
<b>Type</b>	Merges in the type of the event's first sub-event, e.g., "On Premise," "Off Premise," etc.
<b>Time: Start</b>	Merges in the start time of the event's first sub-event.
<b>Time: End</b>	Merges in the end time of the event's first sub-event.
<b>Time: Delivery</b>	Merges in the delivery time of the event's first sub-event.
<b>Time: Serving</b>	Merges in the serving time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Bar</b>	Merges in the bar time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Arrival</b>	Merges in the arrival time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Departure</b>	Merges in the departure time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: NA</b>	These two fields represent two extra time fields that you can make up yourself. They will each merge in the respective time information from the event's first sub-event.
<b>Time: Staff In</b>	Merges in the staff arrival time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Setup</b>	Merges in the setup time of the event's first sub-event. <i>Note: This field, which displays as Hours and Minutes (not as a time), is set up in <b>Administration &gt; New Booking Defaults &gt; Sub-Events</b>.</i>
<b>Time: Tear Down</b>	Merges in the tear down time of the event's first sub-event. <i>Note: This field, which is set up in <b>Administration &gt; New Booking Defaults &gt; Sub-Events</b>, displays as Hours and Minutes, not as a time.</i>
<b>Date</b>	Merges in the date of the event's first sub-event.
<b>Room</b>	Merges in the name of the room of the event's first sub-event.
<b>Room Chg</b>	Merges in the room charge of the event's first sub-event.
<b>Room Category</b>	Merges in the room category of the event's first sub-event.
<b>Setup Style</b>	Merges in the setup style of the event's first sub-event.
<b>Site Name</b>	Merges in the name of the off-premise site location of the event's first sub-event.
<b>Site Address</b>	Merges in the address of the off-premise site location of the event's first sub-event.
<b>Site City</b>	Merges in the city of the off-premise site location of the event's first sub-event.
<b>Site St/Prov</b>	Merges in the state or province of the off-premise site location of the event's first sub-event.
<b>Site Postal</b>	Merges in the postal/ZIP code of the off-premise site location of the event's first sub-event.
<b>Site Telephone</b>	Merges in the telephone number of the off-premise site location of the event's first sub-event.
<b>Site Directions</b>	Merges in all text in the Directions text box of the event's first sub-event, complete with rich-text formatting.
<b>Site Directions (Unformatted)</b>	Merges in all text in the Directions text box of the event's first sub-event, without any formatting (so it adopts the formatting of the merge document).
<b>Site Notes</b>	Merges in all text in the <b>Notes</b> text box of the Site Location Database ( <b>Setup</b>

Field	Description
	> <b>Site Locations</b> ), complete with rich-text formatting.
<b>Site Notes (Unformatted)</b>	Merges in all text in the <b>Notes</b> text box of the Site Location Database ( <b>Setup &gt; Site Locations</b> ) without any formatting (so it adopts the formatting of the merge document).
<b>Site Description</b>	Merges in all text in the <b>Description</b> text box of the Site Location Database ( <b>Setup &gt; Site Locations</b> ), complete with rich-text formatting.
<b>Site Description (Unformatted)</b>	Merges in all text in the <b>Description</b> text box of the Site Location Database ( <b>Setup &gt; Site Locations</b> ) without any formatting (so it adopts the formatting of the merge document).
<b>Site Category</b>	Merges in the name of the site category. This is a customizable quickpick list.
<b>Site Website</b>	Merges in the website address of the off-premise site location of the event's first sub-event.
<b>Setup Notes</b>	Merges in all text contained within the <b>Setup Notes</b> area of the event's first sub-event, complete with rich-text formatting.
<b>Setup Notes (Unformatted)</b>	Merges in all text contained within the <b>Setup Notes</b> area, without any formatting (so it adopts the formatting of the merge document).
<b>Setup Person</b>	Merges in the name of the setup person. This is a customizable quickpick list.
<b>Delivery Charge</b>	Merges in the delivery charge, if applicable.
<b>Delivery Category</b>	Merges in the delivery category. This is a customizable quickpick list.
<b>Delivery Person</b>	Merges in the name of the delivery person. This is a customizable quickpick list.
<b>Delivery Notes</b>	Merges in all text contained within the <b>Delivery Notes</b> area of the event's first sub-event, complete with rich-text formatting.
<b>Delivery Notes (Unformatted)</b>	Merges in all text contained within the <b>Delivery Notes</b> area, without any formatting (so it adopts the formatting of the merge document).
<b>Comments</b>	Merges in all text on the <b>Comments</b> tab of the event's first sub-event, complete with rich-text formatting.
<b>Comments (Unformatted)</b>	Merges in all text on the <b>Comments</b> tab of the event's first sub-event, without any formatting (so it adopts the formatting of the merge document).
<b>Planned Guests</b>	Merges in the planned guest count of the event's first sub-event.
<b>Actual Guests</b>	Merges in the actual guest count of the event's first sub-event.
<b>Guaranteed Guests</b>	Merges in the guaranteed guest count of event's first sub-event.
<b>Sub-Event Number</b>	Merges in the sub-event number of the event's first sub-event.

## Customizing Quickpick Lists

Throughout CaterEase the majority of fields offer "quickpick lists" - drop-down lists of choices that you can select from to keep your data entry consistent. These lists are yours to create, and they can be edited as described below.

Note: Editing the list of "Sales Representatives" is done through System Security.

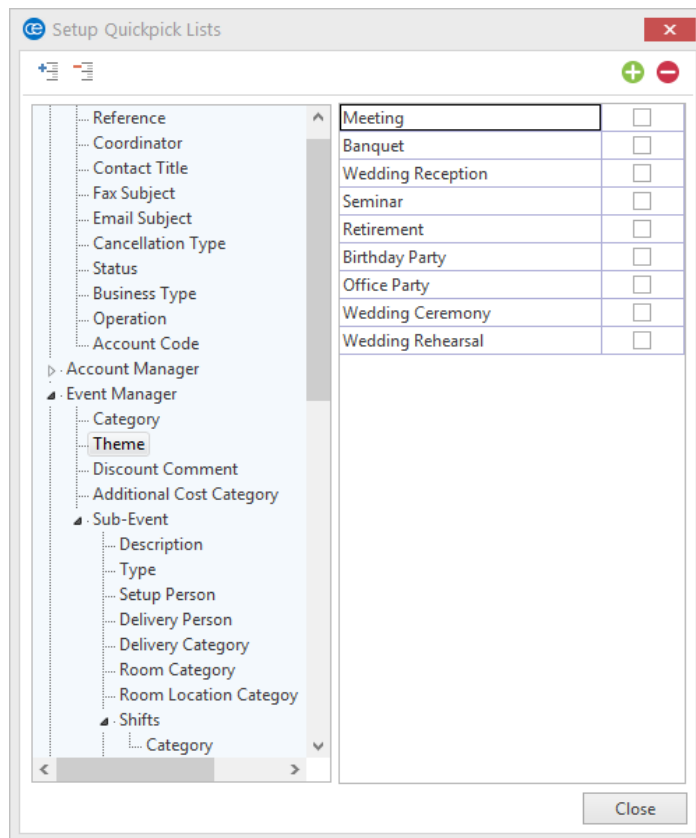
### Editing Quickpick Lists

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

2. Click **Lists > Quickpicks**.

**Result:** The Setup Quickpick Lists window opens.

**Note:** You can also click the **Quickpicks** button in the **Setup** group of the navigation pane (left-hand side of your screen).





3. On the left-hand side of the Setup Quickpick Lists window, click the expand button to the left of any

quickpick category to see the corresponding lists. Click the **Full Expand** button  to view all expanded categories.

The "Room" list, available in the "Event Manager" category above (under "Sub-Event"), is only available if your company has NOT purchased banquet room tracking. This list allows you to create a custom quickpick list for the Room field, but will not track or graph those rooms.

4. Click on the desired quickpick list to select it.

5. **[Optional]** Click the **Add New Item** button  at the top right of the window to add a new item to the list.  
***Note:** In certain lists (Business Type, Status, Event Category), you are able to apply a color to the item, so that you might color-code your Event Scheduler and various detail grids based on these lists. Simply click into the Color column next to each item and click the down arrow to select a new color, or click the browse button (ellipsis button) to set a custom color.*
6. **[Optional]** Click on an item to select it and either edit as desired, or click the **Delete Current Item** button  to remove the item from the list.
7. **[Optional]** Hold your left mouse button down on any item in the list and drag it up or down to reposition it.  
***Note:** You cannot drag an item you are currently editing; click off of the item first and then click and hold your left mouse button over it again to drag and drop.*

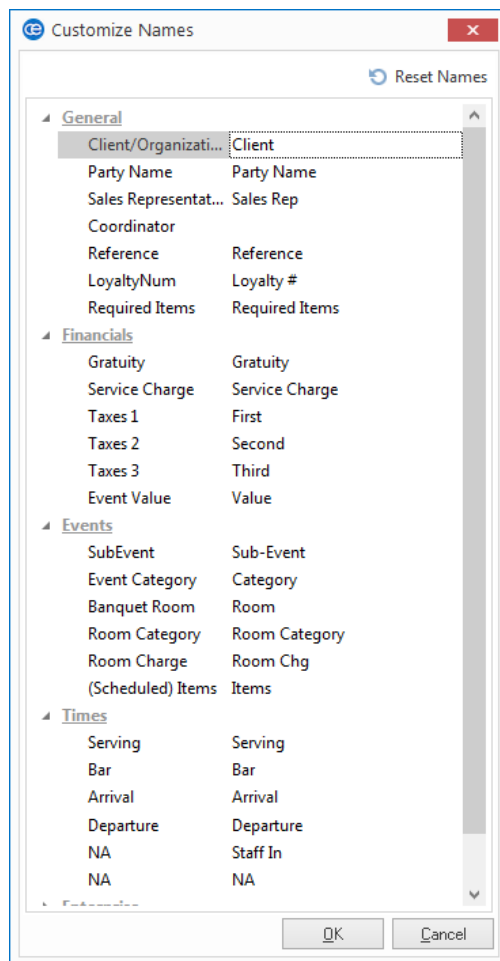
## Renaming Fields

If you do not like the term "Sub-Event," or if you'd rather use the field "Category" to track some specific piece of information, either of these can be renamed through your program's Global Settings. Various fields throughout your program can be renamed by following the steps outlined below.

### Customizing Field Names

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click **General > Customize Names**.

**Result:** The Customize Names window opens.



**Tip:** If prints in your Print Designer or Marketing Tools package use the particular fields you have renamed here, you will likely need to open those prints and reselect those fields with their new names in order for them to merge information properly.

3. Click into the General, Financials, Events, Times, Enterprise, or Miscellaneous category fields and type a new name as desired.
4. When finished, click **OK**.

**Result:** A notification message appears.

**Note:** Changes will take effect throughout the program anywhere these terms are found.

**Note:** Click the **Reset Names** button at the top right-hand side of the window to restore all fields back to their defaults.

5. Click **OK** on the notification message.

**Result:** The window closes and your changes are saved.

## Creating User-Defined Fields

If your company needs to keep track of unique information about your clients, events, menu items, etc., you can create your own custom user-defined fields. These fields can be displayed anywhere in their respective areas of the program or on various prints, and can be formatted as text fields (for which you can create custom quickpick lists), phone numbers (which will honor your custom phone number format), number fields (offering drop-down calculators), currency fields, dates (offering drop-down calendars), or times.

### Creating a User-Defined Field

1. Click the **Administration** ribbon tab (top of your screen).
2. Click the **Lists** button and choose **User Defined Fields**.

**Result:** The *User-Defined Fields* window opens.

	Name Of Field	Type
1	Contact Type Preference	Text
2	Contact Time Preference	Text
3	NA	Text
4	NA	Text
5	NA	Text
6	NA	Text
7	NA	Text
8	NA	Text
9	NA	Text
10	NA	Text
11	NA	Text
12	NA	Text
13	NA	Text
14	NA	Text
15	NA	Text
16	NA	Text
17	NA	Text
18	NA	Text
19	NA	Text
20	NA	Text

3. Click on the appropriate tab at the top of your User-Defined Fields window for the type of field you are creating: the **Accounts** tab for fields to use in Account Manager, **Events** tab for your Event Manager, **Sub-Events** tab for your sub-event window (in Event Manager), and **Guestrooms** tab for your Guestrooms Manager (if applicable).
4. Click into the first available user-defined field and type as desired. (A field will be "available" if it has the default value of "NA," meaning a user-defined field has yet to be created.)

**Note:** You may need to use your **[Backspace]** or **[Delete]** keys to erase the "NA" that is currently in the field.

5. Press your **[Enter]** key.

**Result:** *Your cursor positions you to the right, to the Type field.*

6. Click the down arrow at the right of the Type field, and select a format type for this field.

- A Text field allows for free-flowing text, and allows you to create a custom quickpick list for the new field.
- A Phone field formats the field according to how phone numbers are set up in your "Regional" Global Settings.
- A Number field allows for free-flowing numbers, and offers the use of a drop-down calculator.
- A Currency field formats numbers entered as currency (e.g., "1.5" will print as "\$1.50").
- A Date field allows you to type a date, and offers the use of a drop-down calendar.
- A Time field contains a colon (between hours and minutes) and the letter "M" (for AM or PM - not applicable if you have the 24 Hour Clock "Regional" Global Setting established).

7. Repeat Steps 3-6 as necessary to add more fields.

8. When finished, click **OK** at the bottom right of the window to save your changes.

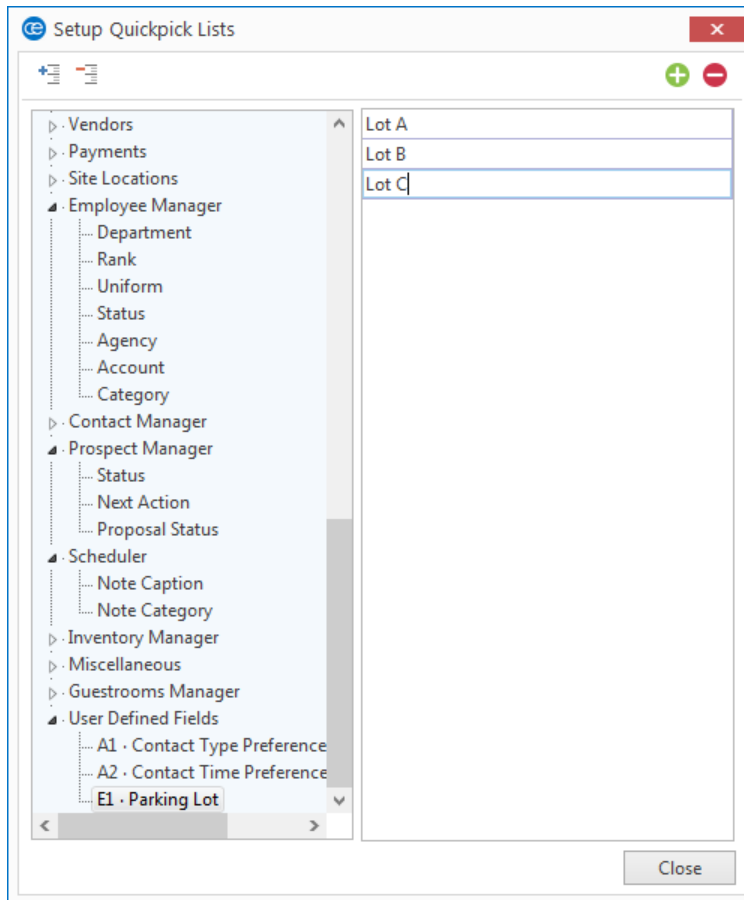
## Creating a Quickpick List for a User-Defined Field

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

2. Click **Lists > Quickpicks**.

**Result:** The Setup Quickpick Lists window opens.

**Note:** You can also click the **Quickpicks** button in the **Setup** group of the navigation pane (left-hand side of your screen).



3. On the left-hand side of the Setup Quickpick Lists window, click the expand button to the left of the category labeled **User Defined Fields**. (Optionally click the **Full Expand** button  , located on the upper left-hand side of the window, to expand all quickpick categories.)

**Result:** Any user-defined field you have created and formatted as a Text field will be listed here.

**Note:** Quickpick lists can only be created for user-defined fields with a Type of "Text."

4. Click on the desired user-defined field to select it.

5. Click the **Add New Item** button  at the top right of the window to add a new quickpick item for the user-defined field.

**Note:** To delete an item from a list, select it and click the **Delete Current Item** button



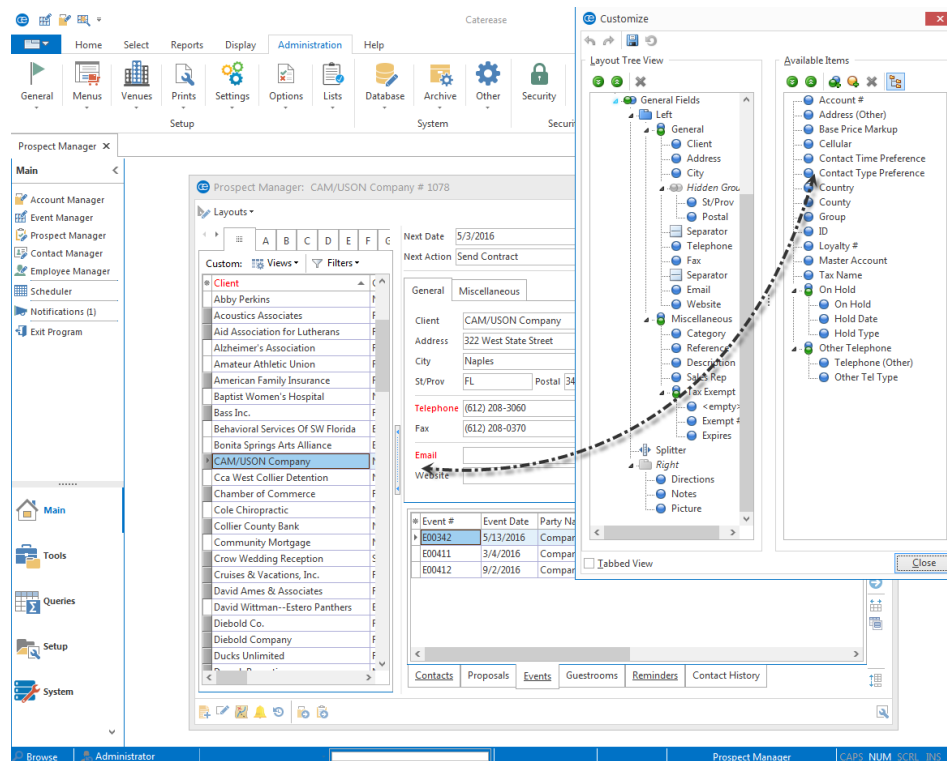
6. **[Optional]** Hold your left mouse button down on any item in the list and drag it up or down to reposition it.

**Note:** *You cannot drag an item you are currently editing. Click off of the item first and then click and hold your left mouse button over it again to drag and drop.*

## Displaying User-Defined Fields

1. Decide where on the Manager screen you would like to place the user-defined field.
2. Right-click directly on any field name or tab name on the screen.  
**Note:** Right-clicking within a field brings up a completely different pop-up menu.
3. Select **Customize** from the pop-up window which displays.  
**Result:** The Customize window opens.
4. Hold your left mouse button down on the name of the user-defined field (found in the **Available Items** pane) you would like to display on your screen.
5. Drag the field name into position anywhere on the screen, and then release your mouse button.

**Note:** Remember to click the **Save Current Window Settings** button  if you would like to retain the new arrangement as your default setting.



# Making Fields Required

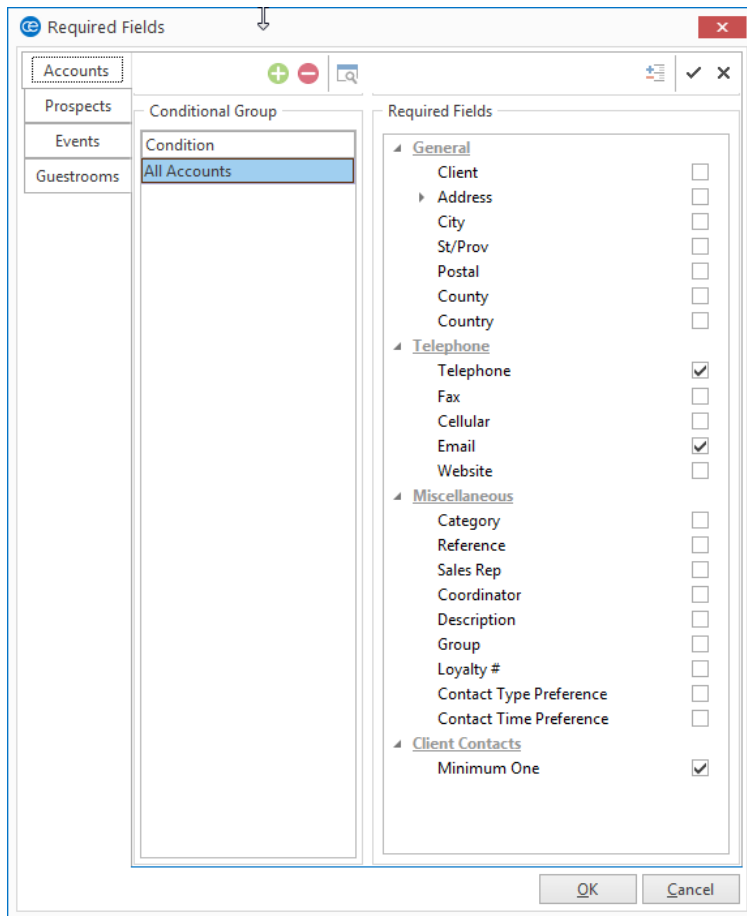
Using the steps below, you can make certain fields of information required or even conditionally required, meaning certain details are required for one type of event or customer but might not be required for others. (For example, perhaps a "corporate" customer is required to have a fax number and e-mail address, while a "social" customer requires a cell phone number.)

## Making Fields Generally Required

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

2. Click **General > Required Fields**.

**Result:** The Required Fields window opens.



**Tip:** Even user-defined fields you have created can be designated as required fields using this tool, and will be listed along with the other fields on the appropriate tabs. Also, note that you can optionally select all fields on the currently displayed tab as required information by clicking the **Check All Fields** button at the top right of the window.

3. On the left-hand side of the window, click on the tab representing the area of the program where you want to create required fields.

**Note:** You can make fields required for your accounts (or "customers"), your prospective leads, your events (including sub-event or "meal" details), or your group rooms contracts.

4. **[Optional]** If you have already created conditions for your required fields (see topic below), click the condition in labeled "All Accounts" (or "All Events," "All Prospects," etc.), in the left pane of the window.

5. In the right-hand pane of the window, click into the checkbox next to any field you want to be required information, optionally clicking expand button next to any unopened group of fields to choose fields from that group.

**Result:** *The selected fields will now be required information, meaning that no accounts, events, etc., will be able to be saved without those details entered. (Existing accounts, events, etc., that are missing required information can be opened; however, they cannot be edited and saved until all required information has been entered.)*

**Important Note:** *If designating required fields for events, you can click the **Sub-Events** button at the bottom right of the window to make specific sub-event details required.*

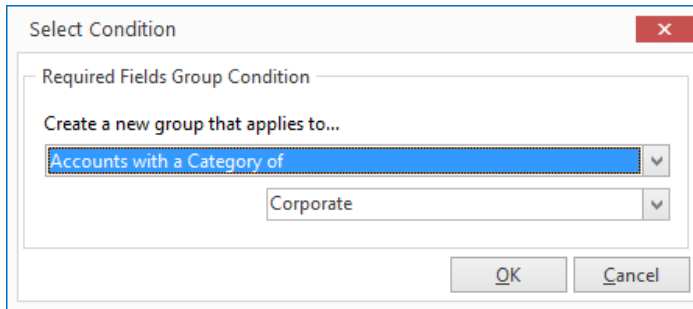
6. Click **OK** to close the window and save your changes.

## Making Fields Conditionally Required

1. On the left-hand side of the Required Fields window, click on the tab representing the area of the program where you want to create conditionally required fields.

**Note:** You can make fields required for your accounts (or "customers"), your prospective leads, your events (including sub-event or "meal" details) or your group rooms contracts.

2. Click the **Add Condition** button , located at the top center of the window.  
**Result:** The Select Condition window opens.



3. Click the down arrow to the right of the first field in the window to select a condition.

**Note:** Conditions vary depending on the tab selected in Step 1, above.

4. Click the down arrow to the right of the second field in the window and choose an option from the corresponding quickpick list.

**Note:** You can customize these lists.

5. In the right pane of the window, click into the checkbox next to any field you want to designate as required information for records that match your condition, optionally clicking the expand button next to any unopened group of fields to choose fields from that group.

**Result:** The selected fields will only be required for records that match your condition (see the tip below for important information about prioritizing conditions).

**Note:** When using Event Wizard to book an event, you can create custom Wizard layouts with the same names as your event "Categories" or "Business Types," and when you use one of those Wizards to book a new event, the appropriate fields will be required.

**Important:** Hold your left mouse button down on the new condition you've created in the left pane of the window and drag it up (or down) in the list to prioritize.  
See the tip for important information.

**Tip:** The program evaluates these conditions in the order they are listed, and stops when it reaches a condition that is true. For example, if your first condition for accounts is "Category = Corporate" and your second condition is "Description = Association Member," when the program finds an account with a category of "Corporate," it will apply those required fields and stop, never evaluating for the second condition. For this reason, it is imperative that any condition that says "All" records ("Accounts," "Events," etc.), must be the LAST condition listed.

6. When finished, click **OK** to close the window and save your changes.

## Establishing New Booking Defaults

The New Booking Defaults feature (available in all versions of Caterease) allows you to change certain settings in the program and affect all users on your Caterease network. Settings here include general regional settings, such as phone/fax number format, and general field settings, such as the ability to rename time fields. New Booking Defaults also affect settings specific to particular Managers, such as defaulting guest counts in Event Manager, as well as a variety of other miscellaneous settings.

### Setting New Booking Defaults

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click **General > New Booking Defaults**.  
***Result:** The New Booking Defaults window opens.*

New Booking Defaults	
Accounts	<u>Address</u>
Contacts	City Naples
Events	State FL
Employees	Postal
Sub-Events	County
Prospects	Country U.S.A.
Guestrooms	<u>Miscellaneous</u>
	Reference
	Description
	Sales Rep
	Coordinator
	Category
	Other Tel Type
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

3. Along the left-hand side of the New Booking Defaults window, select the tab that has the information you want to enter or change.
4. Enter information into a field in one of the following ways:
  - Click into a field and type a default entry as desired.
  - Click into a quickpick field, click the down arrow at the right of a field, and select a default from the corresponding quickpick list.

**Note:** *If the default entry you want is not on a quickpick list (or if there is no list), see [Customizing Quickpick Lists](#).*

5. Click into a checkbox to enable a default feature.
6. Press your **[Enter]** key to move from field to field.
7. Repeat Steps 3-5 as necessary to enter more default information.
8. When finished, click **OK** at the bottom right of the window to close the window and save your changes.

## Adding or Editing Contact People in an Event

Your customers might have multiple contact people, each with his or her own telephone number, address, etc. Once a contact has been added, all you have to do is retrieve the contact information (rather than type it all again). Or, if no contact has been added, you can enter on-the-fly, directly from your event.

### Adding or Editing Contact People in an Event

1. From the **Event** tab in Event Manager, click the down arrow to the right of the Booking Contact field or Site Contact field.

**Result:** A pop-up window opens, from which you can edit your existing contact's information, choose another contact, or add a new contact.

The screenshot shows the 'Event Manager' window for 'Acoustics Associates # E00257'. The interface is divided into several sections:

- Client Information:**
  - Client: Acoustics Associates
  - Address: 1661 Estero Blvd, Ft. Myers, FL 33931
  - Telephone: (612) 544-8901
  - Fax: (612) 544-2928
- Financials:**
  - Subtotal: \$668.75
  - Serv Chg: \$103.80
  - Tax: \$46.81
  - Total: \$819.36
  - Cost Per Guest: \$23.31
- Event Details:**
  - Party Name: Company Lunch
  - Sales Rep: John Smith
  - Theme: Banquet
  - Category: Social
  - Booking Contact: Grover, Rochelle
  - Site Contact: First: Rochelle, Last: Grover, Title: Coordinator
  - Event #: E00257
  - Date: 6/9/2016, Thursday
  - Status: Definite
  - Planned: 25, Booked: 4/6/2016
  - Actual: 25, Revised: 7/15/2016 (11:12 am)
  - Intend: 22
- Notes:**
  - Each table will
  - Telephone: (612) 544-8901
  - Fax: ( ) -
  - Cellular: ( ) -
  - Email: Rgrover@aassociates.com

2. If you already entered a contact person for this account, click the **Select Contact From File** button located on the upper right-hand side of the window, then double-click on the contact person's name to select him or her into the event.

**Result:** The Select Contact window opens.

**Note:** Click into the **Site & Booking Contact** checkbox if you would like the contact person you are selecting to appear as both the Site Contact and Booking Contact.

Name	Title
Grover, Rochelle	Coordinator
Miller, Susan	President

- When finished, click **OK**.

**Result:** The *Select Contact* window closes and contact person you selected in step 2, above, displays in the Booking Contact and/or Site Contact field.

- Add a new contact by typing directly into the various fields (Name fields, Salutation, Telephone/Fax/Cellular, Email) or, in the case of the Title field, by choosing an available option from the drop-down quickpick list to the right of the field.

**Note:** If no quickpick list appears for a field, see [Customizing Quickpick Lists](#).

- Click the **Add Contact to File** button  to add the new contact to your contact list.

**Result:** A confirmation prompt appears.

- Click **Yes** to confirm.

**Result:** An informational prompt appears.

- Click **OK**.

**Result:** The contact is added to your contact list.

## Selecting a Contact from a Different Account

1. From the **Event** tab in Event Manager, click the down arrow to the right of the Booking Contact field or Site Contact field.

**Result:** A pop-up window opens, from which you can edit your existing contact's information, choose another contact, or add a new contact.

2. Click the **Select Contact From File** button , located on the upper right-hand side of the window.  
**Result:** The Select Contact window opens.

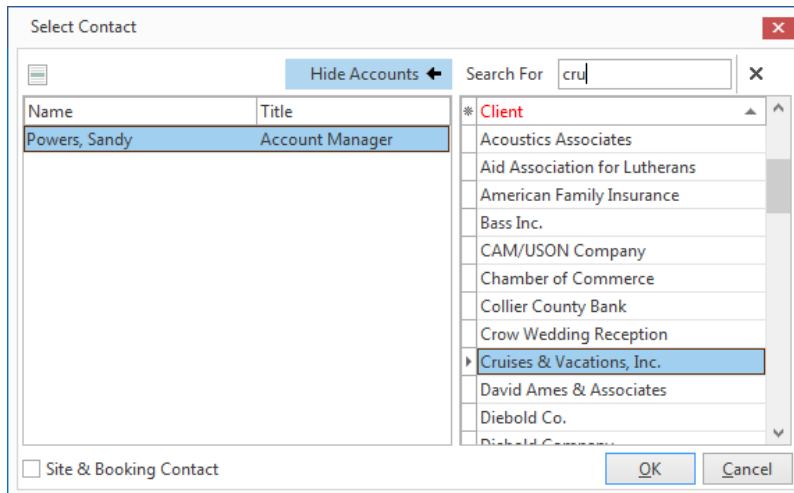
3. Click the **Show Accounts/Hide Accounts** button.  
**Result:** A panel is added to the right of the Select Contact window, revealing your account list.


4. Begin typing the name of the account (which has the contact you are seeking) into the Search For field.  
**Result:** You are scrolled to a match as you type.

5. Double-click on the name of the contact person you would like to add as the Booking Contact or Site Contact.

**Result:** The Select Contact window closes and the selected contact name displays in the Booking Contact and/or Site Contact field.

**Note:** Click into the **Site & Booking Contact** checkbox if you would like this contact to serve as both the Site Contact and Booking Contact.



**Tip:** Click the **Quick Column Customizing** button , located to the left of the word **Client**, to reveal additional columns that can be added to your display.

## Adding a Sub-Event (or Meal)

1. Click the **Sub-Event** button, located next to the **Event** button on the left-hand side of your screen.

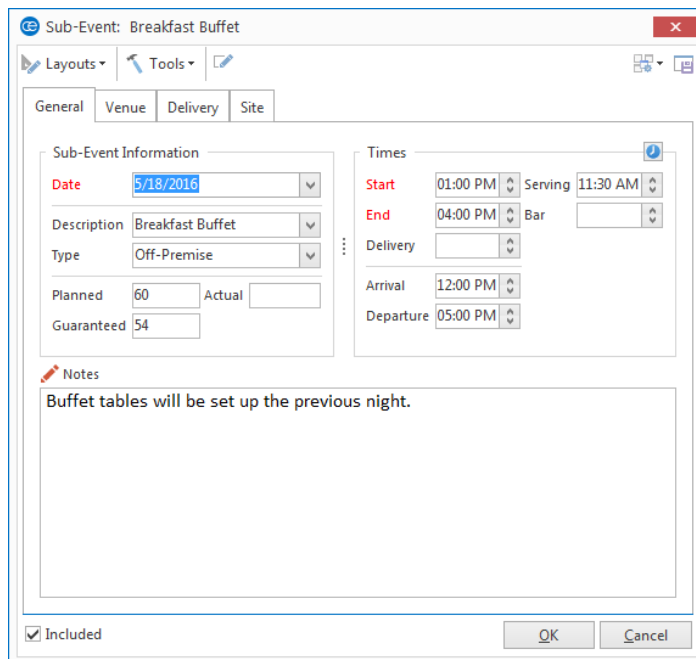
**Result:** The Event Manager changes to the Sub-Event Display.

2. Click the **Add A New Sub-Event** button , located on the Sub-Event pane, which is to the left of your **Food/Service** tab.

**Result:** The Sub-Event window opens, with the date and guest counts defaulting from your general event information.

**Note:** As an alternative, hold your **[Shift]** key down simultaneously while clicking the above button. Doing so prevents a new sub-event window from popping up, and instead you can edit your new sub-event directly in the grid on the left-hand side of your screen.

**Tip:** Leave the **Included** checkbox (bottom left of the New Sub-Event window) selected, unless you decide you do not want to include this sub-event and its details (menu, venue, times, etc.), with this event (for example, if it was created as an optional proposal and is not to be included).



Sub-Event: Breakfast Buffet

Layouts Tools

General Venue Delivery Site

Sub-Event Information

Date: 5/18/2016

Description: Breakfast Buffet

Type: Off-Premise

Planned: 60 Actual:

Guaranteed: 54

Times

Start: 01:00 PM Serving: 11:30 AM

End: 04:00 PM Bar:

Delivery:

Arrival: 12:00 PM

Departure: 05:00 PM

Notes

Buffet tables will be set up the previous night.

☒ Included

OK Cancel

3. Click into the Description field and type a description for the sub-event, or select one from your custom quickpick list.

**Note:** Examples of sub-event descriptions might include "Breakfast," "Break," "Buffet," etc.

4. **[Optional]** Click into the Type field and enter a type for the sub-event, or select one from the custom quickpick list.

**Note:** This field can be used for tracking your sub-events. Examples might include "Off-Premise," "On-Premise," "Delivery," etc.

5. Enter times by hand, using the formats below, or by using the Time Wizard tool:

- As a normal number for AM hours - that is, type "9" for 9:00 AM, "11" for 11:00 AM, etc.
- As a four-digit number for any other times - that is, type "0930" for 9:30 AM or "0930" and a "P" for 9:30 PM.


## Unit 5: Entering General Event Information

- Click into the hours, minutes, or AM/PM area of the time field and use the up-and-down arrows at the right of the field to make changes.
6. **[Optional]** Enter banquet room details or off-premise information, depending on the venue of the party.

## Using the Mapping Interface

You can get up-to-the-minute accurate directions to a customer's or prospect's address, or to an event's site location, using our dynamic interface with various online mapping software.

### Using the Mapping Interface

1. Click the **Get Map** button  from the toolbar at the bottom of your Account Manager or Event Manager screen (also in Prospect Manager, if you own the Prospect Manager add-in module).

**Result:** The Get Directions window opens, with your company's address automatically filed in as the **Start** information and the address of the client (Account Manager, Event Manager), prospect (Prospect manager) or Site Location (Event Manager Sub-Event display) as the **End** information.

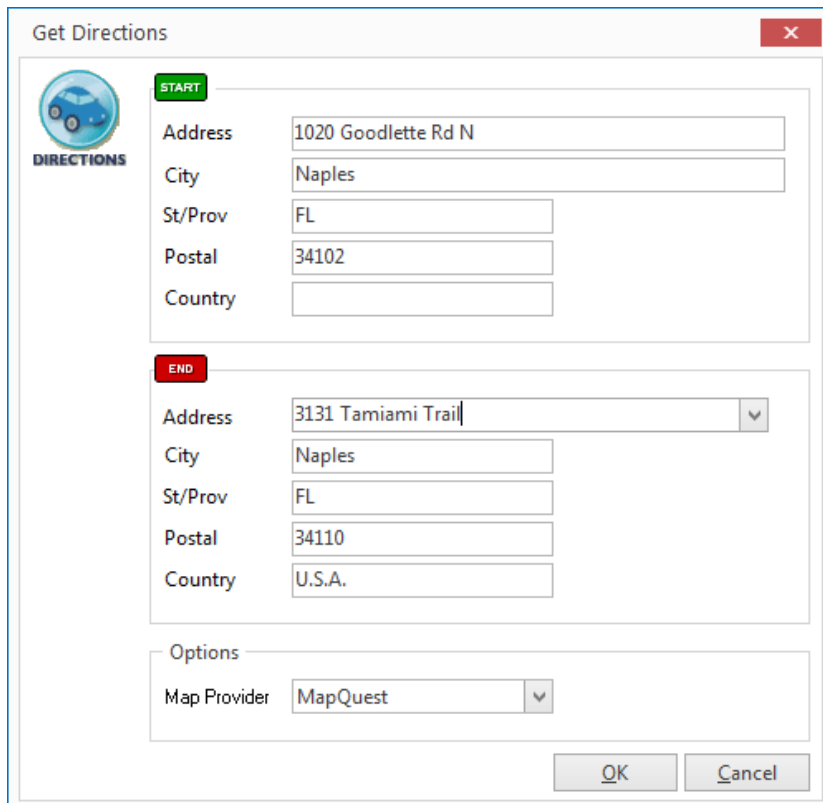
**Note:** If you have not filled in this prospect's address, city, state, etc., then the End information will be blank.

2. **[Optional]** In Event Manager, click the down arrow to the right of the "End" address field to alternate between using the client's address and the site location address.

3. Click the down arrow next to Map Provider in the **Options** section and choose your preferred mapping website.

**Note:** Google Maps automatically provides directions in the default language (English, Spanish, etc.), of your browser.

**Tip:** You can copy and paste these directions into Caterease using the **Paste as Plain Text** option. Do NOT opt to simply paste this text, as it will bring HTML code and other formatting from the website; using "Paste as Plain Text" strips it of this code.



**Get Directions**

**DIRECTIONS**

**START**

Address: 1020 Goodlette Rd N

City: Naples

St/Prov: FL

Postal: 34102

Country:

**END**

Address: 3131 Tamiami Trail

City: Naples

St/Prov: FL

Postal: 34110

Country: U.S.A.

**Options**

Map Provider: MapQuest

OK Cancel

4. Click **OK** to generate the directions.

**Result:** *Your web browser will open on your chosen website, showing directions to the "End" address.*

**Note:** *This interface only works if you have a connection to the Internet currently active on your computer.*

5. When finished, click **OK**.

# Managing Multiple Events Simultaneously

Caterease lets you open multiple windows (including multiple Event Managers) simultaneously, so you can handle any interruption without losing your place!

## Opening Multiple Managers

1. With one Event Manager (or other Manager) open, click the **Event Manager** button (or other "Manager" button) on the **Main** sidebar.  
**Result:** A confirmation prompt appears.
2. Click **Yes** to confirm your choice.
3. Work as desired in the new Manager.
4. Close the second Manager to return to your previous Manager (or toggle between the two). Your cursor will be positioned in the exact location in which you were working before you switched to the other Manager.

**Tip:** Up to three instances of each Manager can be opened at the same time. The tabs at the top of your screen indicate the number of open Managers, as well as any other open Caterease screens, such as your Scheduler, Marketing Tools, etc.

The screenshot shows the Caterease software interface. The 'Main' sidebar on the left contains a list of managers: Account Manager, Event Manager, Prospect Manager, Contact Manager, Employee Manager, Scheduler, and Notifications (7). The 'Event Manager' button is highlighted with a red circle. The main window displays the 'Event Manager: Greg's Soccer Team # E00004' form. The 'Client Information' tab is active, showing details for Greg's Soccer Team, including address, telephone, and fax. The 'Financials' tab shows a summary of costs, including Subtotal, Serv Chg, Tax, Total, and Cost Per Guest. The 'Event' tab shows details for the event, including Party Name, Sales Rep, Theme, Category, Booking Contact, Site Contact, Event #, Date, Status, Planned, Actual, Booked, and Revised dates. The 'SubEvent' tab is also visible.



## Unit 6: Reviewing Cost/Profit of an Event

In this section, you will learn:

- Reviewing the Event Costing Summary
- Changing Line Item Costs
- Setting Discounts for an Event



# Managing Event Costing

The cost of an event is automatically calculated based on the cost of its menu items, the wages paid to staff working the party and any additional adjustments you choose to make. While all versions of CaterEase allow you to enter a line item cost for each menu item, the Standard and Professional versions can automatically calculate an item cost based on its ingredients, and allow you to change those ingredients on-the-fly.

## Reviewing the Event Costing Summary

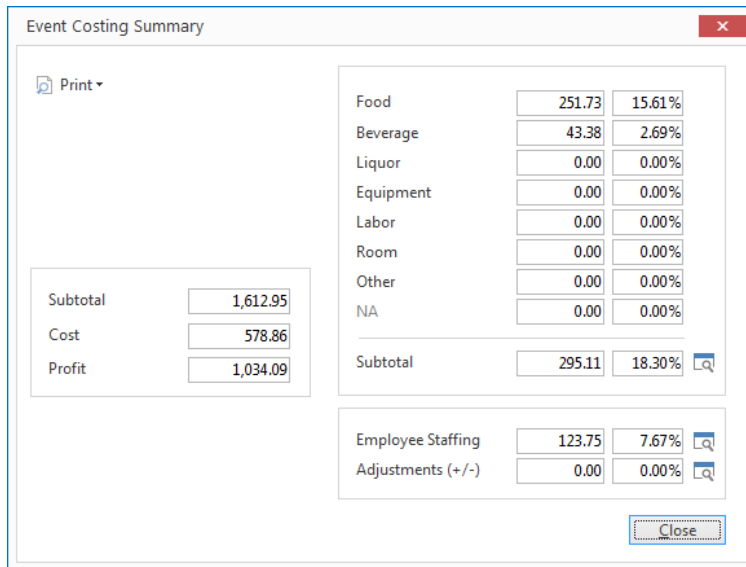
1. In the Event Manager, retrieve the event for which you want to reviewing costing.

2. Click the **Tools** button from the **Home** ribbon tab and choose the **Costing Summary** button .

**Note:** Depending on your personal configuration, the **Costing Summary** button may appear in the toolbar at the bottom of your screen.

**Result:** The Event Costing Summary window opens.

**Note:** In the Express version, you can review event cost and profit by clicking your right mouse button over the **Financials** area (top right of Event Manager) and choosing **Customize**. Next, click into the checkboxes next to "Cost" and "Profit."



The screenshot shows the 'Event Costing Summary' window. It has a 'Print' button in the top left. On the left, there are three input fields: 'Subtotal' with value 1,612.95, 'Cost' with value 578.86, and 'Profit' with value 1,034.09. The main area contains two tables. The first table lists categories: Food (251.73, 15.61%), Beverage (43.38, 2.69%), Liquor (0.00, 0.00%), Equipment (0.00, 0.00%), Labor (0.00, 0.00%), Room (0.00, 0.00%), Other (0.00, 0.00%), and NA (0.00, 0.00%). Below this is a 'Subtotal' row with values 295.11 and 18.30%, and a magnifying glass icon. The second table lists 'Employee Staffing' (123.75, 7.67%) and 'Adjustments (+/-)' (0.00, 0.00%), both with magnifying glass icons. A 'Close' button is at the bottom right.

Category	Cost	Profit
Food	251.73	15.61%
Beverage	43.38	2.69%
Liquor	0.00	0.00%
Equipment	0.00	0.00%
Labor	0.00	0.00%
Room	0.00	0.00%
Other	0.00	0.00%
NA	0.00	0.00%
<b>Subtotal</b>	<b>295.11</b>	<b>18.30%</b>
Employee Staffing	123.75	7.67%
Adjustments (+/-)	0.00	0.00%

3. [Optional] Click the **View Line Item Details** button , located to the right of the Total Line Items field, to see a breakdown of the cost of each food/service item.

**Result:** The Food/Service Items Breakdown window opens.

**Note:** You can manipulate the data in this grid in many ways, and print the grid details.

4. [Optional] Click the **View Staffing Details** button  to the right of the Employee Staffing field to review staffing cost breakdowns.

**Result:** The Staffing Breakdown window opens.

5. [Optional] Click the **View/Edit Costing Adjustments** button  to the right of the Adjustments field to review, edit or add cost adjustments.

**Result:** The Event Costing Adjustments window opens.

**Note:** You can add adjustments to the cost of an event easily (if, for example, there is an additional cost


*you are incurring that is not part of the menu or staffing of this event) by clicking the green plus sign button in this window.*

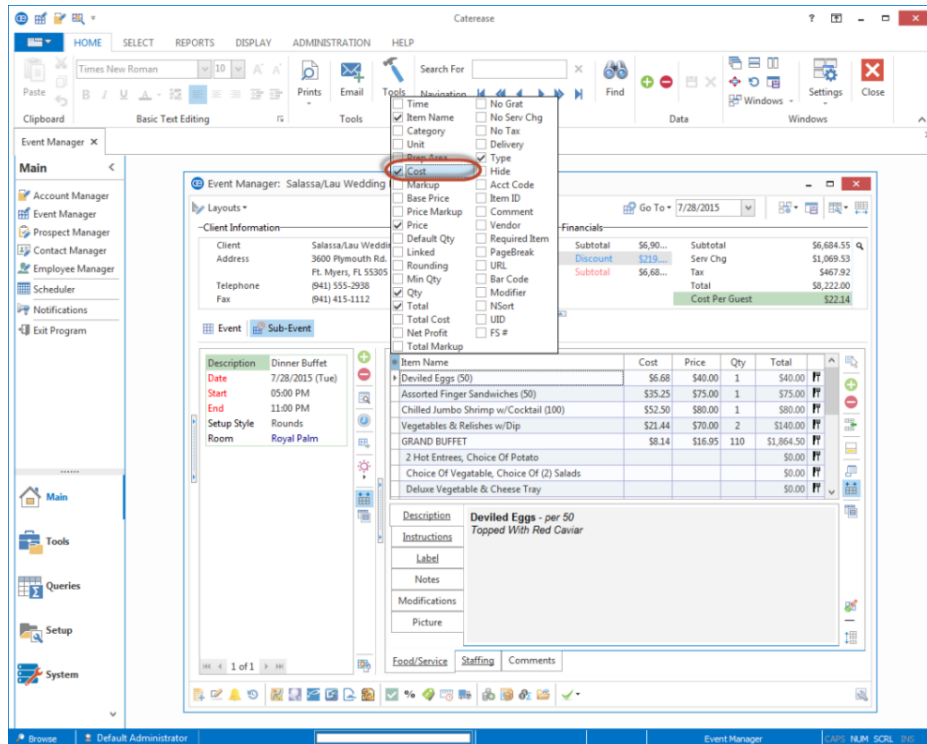
6. To print a costing summary for the current event, click the **Print Costing Summary** button at the top left of the Event Costing Summary window.

**Result:** *A print preview of the Event Costing Summary displays.*

**Note:** *If you have not yet saved recent changes to your event, you may be prompted to do so. You can also print the Event Costing Summary by clicking the **Home** ribbon tab and selecting **Prints > Event Sub-prints > Event Costing Summary**.*

## Changing Menu Line Item Costs

1. In the Event Manager, click the **Sub-Event** button to show the meal(s) for the event.
2. In the grid on the **Food/Service** tab, click the **Quick Column Customizing** button , located to the left of the **Item Name** column heading.  
**Result:** A drop-down list of optional columns appears.
3. Click into the checkbox to the left of the **Cost** column to display that column in the grid.



4. [Optional] Hold your left mouse button down on the **Cost** column title and drag it up or down in the drop-down list to reposition it on the grid, or drag and drop the column heading on the grid itself.
5. Click into the **Cost** column for any menu item in the grid and enter or edit a line-item cost as desired.

## Setting Discounts for an Event

Discounts can be easily applied to an event either as a percentage of "food" items, "beverage" items, "liquor" items, etc., or as a whole dollar amount.

### Applying Event Discounts

1. In the Event Manager, retrieve the event for which you want to establish default discounts.
2. Click the **Tools** button from the **Home** ribbon tab.
3. Click the **Default Discounts** button.

**Result:** *The Event Discounts window opens.*

Discount Percentages	
Food	10
Beverage	10
Liquor	10
Equipment	0
Labor	0
Room	0
Other	0
NA	0

Additional: \$0.00

Comment: VIP Discount

4. Click into any field and enter a discount rate.  
**Note:** *Type in a field to enter information, or use the up-and-down arrows next to a field to adjust the rate one-hundredth (.01) of a percent. You can also optionally enter a whole-dollar discount (see Step 7, below).*
5. Press your **[Enter]** key to move from field to field.
6. Repeat for any menu item type.
7. **[Optional]** Enter a number into the Additional field to serve as a whole dollar discount.  
**Note:** *Simply type into the field, or click the down arrow to the right of a field to access the drop-down calculator.*

8. **[Optional]** Type a word or phrase into the Comment field to identify the discount, or select an option from the quickpick list.

**Note:** *This comment will appear on your event prints (Contract, etc.) next to the discount amount. Examples include "VIP Discount," "Gift Certificate," etc. If this field is blank, default comment of "Discount Given" will appear.*

9. Click **Close** when finished.

**Result:** *The Event Discounts window closes, saving your changes.*

## Copying Discounts for an Event


1. In the Event Manager, retrieve the event for which you want to establish default discounts.
2. Click the **Tools** button from the **Home** ribbon tab and choose **Default Discounts**.

**Result:** The Event Discounts window opens.

Discount Percentages	
Food	10
Beverage	10
Liquor	10
Equipment	0
Labor	0
Room	0
Other	0
NA	0

Additional: \$0.00

Comment: VIP Discount

3. Click into any field and enter a discount rate.  
**Note:** Type in a field to enter information, or use the up-and-down arrows next to a field to adjust the rate up or down one-hundredth (.01) of a percent.
4. Press your **[Enter]** key.
5. Click the **Copy Discounts** button .  
**Result:** The discount that was entered in Step 4 is copied to the other fields.  
**Note:** Click the **Clear** button to remove the discount from the fields.
6. **[Optional]** Enter a number into the Additional field to serve as a whole dollar discount.  
**Note:** Simply type into the field, or click the down arrow to the right of the field to use the drop-down calculator.
7. **[Optional]** Type a word or phrase in the Comment field to identify the discount, or select from the quickpick list.  
**Note:** This comment will appear on your event prints (Contract, BEO, etc.), next to the discount amount. Examples include "VIP Discount," "Gift Certificate," etc. If this field is blank, the default comment of "Discount Given" will display.
8. Click **Close** when finished.  
**Result:** The Event Discounts window closes, saving your changes.

## Displaying Discounts on the Event Manager Screen

1. In Event Manager, click your right mouse button over the **Financials** area at the top right of the window.

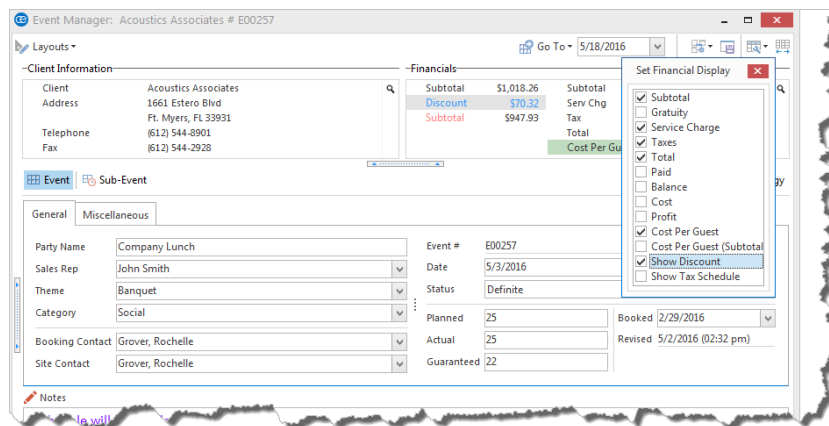
2. Choose **Customize**.

**Result:** The Set Financial Display window opens.

3. Click into the checkbox next to **Show Discount**.

4. Click the , located at the upper right-hand corner of the window, to close the window.

**Result:** The **Financials** area display adjusts based on your selection; it is divided into two sections, with the discount details on the left.



5. Click the **Save Current Window Settings** button  to have discounts show as a default for any event in your Event Manager.



## Unit 7: Entering General Notes and Comments for an Event

In this section, you will learn:



- Setting Up the Program's Scratch Pad
- Entering Comments for an Event
- Entering General Notes for an Event
- Copying Comments or Notes from the Scratch Pad
- Having Comments or Notes Appear on Prints



# Setting Up the Scratch Pad

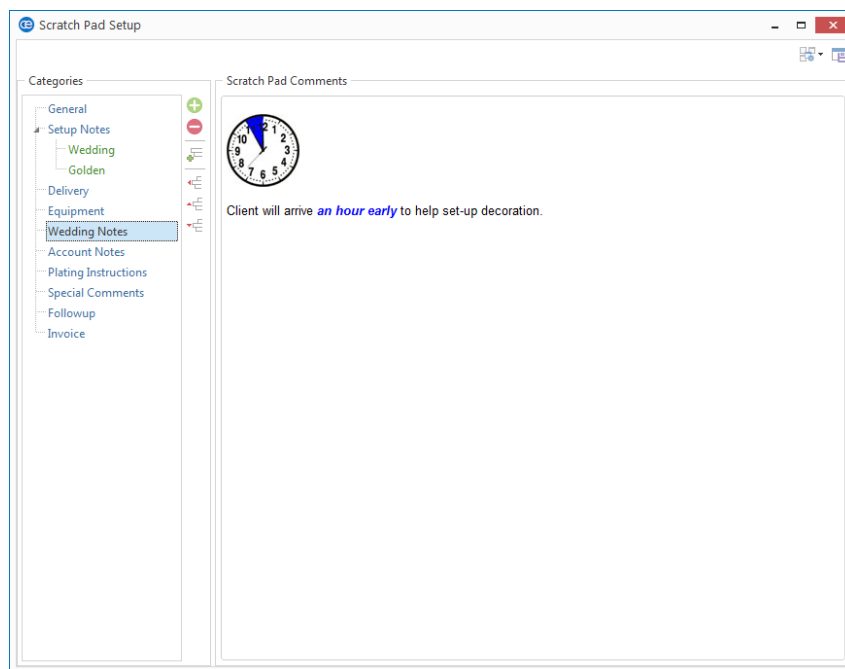
You can avoid repetitive typing by storing large amounts of commonly used text (comments, special requests, setup notes, etc.), in the Scratch Pad.

## Storing Text in the Scratch Pad

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click **Lists > Scratch Pad**.  
**Result:** *The Scratch Pad Setup window opens.*
3. Click the **Add New Category** button , located directly beside the list of categories in the pane on the left.  
**Result:** *A confirmation prompt appears.*
4. Click **Yes**.  
**Result:** *A New Category field is added to the bottom of your **Categories** list, with your cursor positioned for you to enter a new title.*
5. Type a name for your new category and press **[Enter]**.  
**Result:** *Your new category name is saved.*  
**Note:** *Categories are used to organize your list and make locating certain notes easier. Examples might include "Setup Notes," "Equipment," "Special Requests," etc.*
6. Click into the large white text box, in the **Scratch Pad Comments** area, and type notes for the category as desired.
7. Format your Scratch Pad text using the Basic Text Editing tools available in the **Home** ribbon tab.
8. When finished, click the , located at the upper right-hand side of the window.  
**Result:** *A confirmation prompt appears.*

## Unit 7: Entering General Notes and Comments for an Event

9. Click **Yes** to save your changes and close the window.



## Entering Special Requests or Comments

The Comments tab in Event Manager is a place for you to enter a customer's general special requests. These comments can print on your Contract, BEO, and other event prints, or can be optionally suppressed.

### Typing Comments by Hand

1. In the Event Manager, click the **Sub-Event** button on the left-hand side of your screen.

**Result:** The Event Manager switches to the Sub-Event display.

2. Click on the **Comments** tab at the bottom of your screen.

3. Click into the large white text box and type as desired.

**Note:** To avoid repetitive typing, retrieve commonly used comments from the Scratch Pad as described in the topic below.

Event Manager: Acoustics Associates # E00257

Go To: 6/3/2016

**Client Information**

Client	Acoustics Associates
Address	1661 Estero Blvd Ft. Myers, FL 33931
Telephone	(612) 544-8901
Fax	(612) 544-2928

**Financials**

Subtotal	\$668.75
Serv Chg	\$103.80
Tax	\$46.81
Total	\$819.36
Cost Per Guest	\$23.31


**Event** **Sub-Event** Closed Allergy

**Description** Lunch Buffet  
**Date** 5/3/2016 (Tue)  
**Start** 11:00 AM  
**End** 02:00 PM  
**Setup Style** Banquet  
**Room** Sun

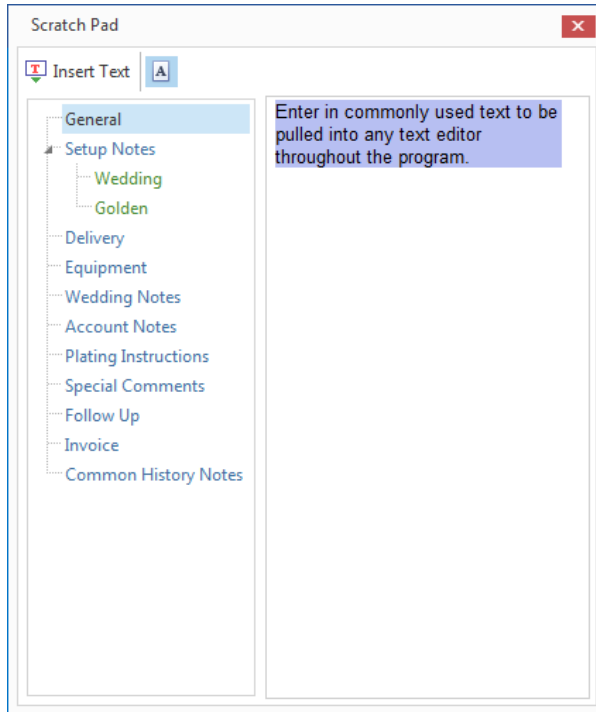
Customer will arrive one hour early to assist with setup.

Food/Service Staffing **Comments**

## Copying Comments from the Scratch Pad

1. On the **Comments** tab in Event Manager, click in the large text block, placing your cursor where you want to insert new text.
2. Click the **Scratch Pad** button , located in the toolbar at the bottom of your screen.

**Result:** The Scratch Pad opens.



**Tip:** When you select a category on the left side of your Scratch Pad (Step 3 above), all text in that category is automatically highlighted by default. As a shortcut, you can quickly insert all highlighted text by simply double-clicking on a Scratch Pad category.

3. **[Optional]** If you have separated your Scratch Pad into various categories, click a category on the left side of the Scratch Pad window to select it.

**Result:** The text for the selected category is displayed on the right-hand side of the Scratch Pad window.

4. Highlight the text you want to copy, and press the **Insert Text** button.

**Result:** The highlighted text will be inserted at the current location of your cursor.

**Note:** To have text inserted *WITHOUT* its formatting, click the **Include Formatting** button  to disable it. (This button is enabled as a default.)

5. When finished, click the  at the top right of your Scratch Pad window.

**Result:** The Scratch Pad window closes.

6. Format the inserted text by highlighting it and using the **Format** toolbar as described in the topic below.

## Formatting Text

1. In the "Notes" text box in Event Manager, highlight any text to select it for formatting.

2. Click the **Home** ribbon tab at the top of your Caterease screen, if it is not already selected.
3. In the **Basic Editing Tools** group, use the following available tools:

Formatting Tool	Description
	<b>Font:</b> Click the down arrow and choose another font for the selected text.
	<b>Font Size:</b> Click the down arrow and choose another size for the selected text.
	<b>Increase/Decrease Font Size:</b> Click these buttons to increase or decrease the size of text by one font size, respectively.
	<b>Font Color:</b> Click the down arrow and choose another color for the selected text.
	<b>Bullet Wizard:</b> Click this button to select bullet style, number style, and outline style.
	<b>Bold:</b> Click this button to make the selected text bold.
	<b>Italic:</b> Click this button to make the selected text italic.
	<b>Underline:</b> Click this button to underline the selected text.
	<b>Align Left:</b> Click this button to align the selected text with the left-hand side of the window.
	<b>Align Center:</b> Click this button to center the selected text in the window.
	<b>Align Right:</b> Click this button to align the selected text with the right-hand side of the window.
	<b>Increase Indent:</b> Click this button to increase the paragraph indent of the selected text.
	<b>Decrease Indent:</b> Click this button to decrease the paragraph indent of the selected text.

## Showing Comments on Event Prints

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.
2. Click the **Print Designer** button.  
**Result:** The Print Designer window opens.
3. On the left side of the window, click the title of the print you want to add "Comments" to.
4. On the lower right of the Print Designer window, confirm there is no check in the checkbox to the right of the **Comments** section.

**Note:** This checkbox will suppress the section; with no check in the box, the Comments section will appear on the print.

**Tip:** Event comments can be included in Marketing Tools merge documents by clicking the **Insert Fields** button and choosing either the formatted or unformatted option from the Sub-Event Fields list.

Event Staffing				<input checked="" type="checkbox"/>
COMMENTS				<input type="checkbox"/>
EVENT NOTES				<input type="checkbox"/>
Event Timeline				<input type="checkbox"/> Suppress Event Timeline Notes
<u>Billing Information</u>				
Subtotal	Paid	Pay Method	Card Number	<input type="checkbox"/>
Tax	Balance	Card Type	None	<input checked="" type="checkbox"/>
Service Charge	None	Card Holder	Expires	<input type="checkbox"/>
Total Value	None	Signature	None	<input checked="" type="checkbox"/>

5. [Optional] Click into the gray header box that reads **Comments**, and enter new heading text for the section if desired.
6. When finished, close Print Designer and save your changes.

## Entering General Event Notes

You can use the large text block at the bottom of the Events display in Event Manager to store general event notes. These notes can be included on your various custom event prints (in Print Designer or Marketing Tools), but do not have to be. You can also copy common notes from your program's Scratch Pad.

### Typing Notes by Hand


1. In the Event Manager, click the **Event** button (if it is not already selected).
2. Click into the large white **Notes** text box at the bottom of your screen.
3. Type as desired.  
***Note:** To avoid repetitive typing, retrieve commonly used comments using the Scratch Pad, as described in the topic below.*

The screenshot displays the Event Manager interface for Acoustics Associates # E00257. The top section includes a 'Go To' dropdown set to 6/3/2016 and a 'Layouts' menu. Below this, the 'Client Information' tab is active, showing details for Acoustics Associates, including address (1661 Estero Blvd, Ft. Myers, FL 33931), telephone ((612) 544-8901), and fax ((612) 544-2928). The 'Financials' tab shows a subtotal of \$668.75, service charge of \$103.80, tax of \$46.81, and a total of \$819.36, with a cost per guest of \$23.31. The 'Event' tab is selected, showing event details: Party Name (Company Lunch), Sales Rep (John Smith), Theme (Banquet), Category (Social), Booking Contact (Grover, Rochelle), and Site Contact (Grover, Rochelle). The event date is 5/3/2016 (Tuesday), status is Closed, and the booked date is 2/29/2016. The 'Notes' section at the bottom contains the text 'Each table will have a flower arrangement.' and an image of a bouquet of purple flowers.

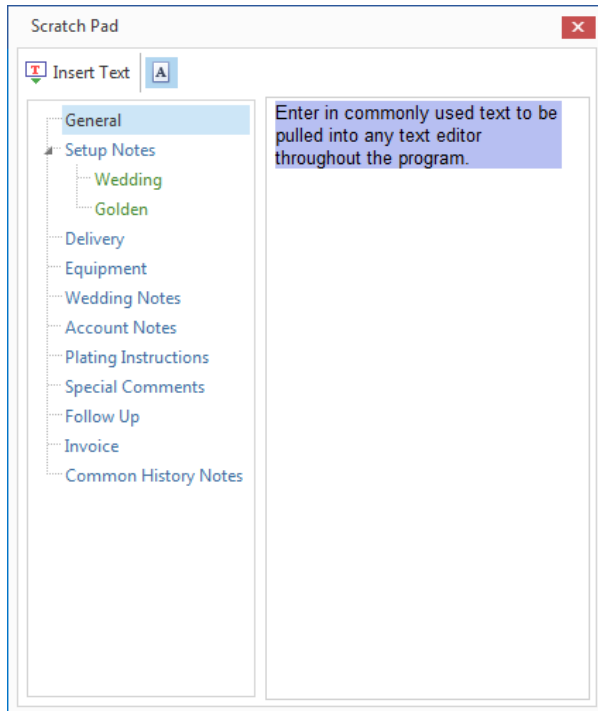
4. **[Optional]** Click your right mouse button anywhere in the **Notes** pane and choose **Insert > Current Date & Time** to have the current date and time inserted into your notes. Click **Insert > Image** to browse to a stored image.
5. **[Optional]** Highlight any text and format as desired.

## Copying Notes from the Scratch Pad

1. Click into the large **Notes** text box on the Event Manager screen, placing your cursor where you want to insert new text.

2. Click the **Scratch Pad** button , located at the lower left-hand side of your Event Manager screen. (You can also access the Scratch Pad from your **Tools** menu.)

**Result:** The Scratch Pad window opens.



**Tip:** When you select a category on the left-hand side of your Scratch Pad, all text in that category is automatically highlighted by default. As a shortcut, you can quickly insert all highlighted text by simply double-clicking on a Scratch Pad category title.


3. **[Optional]** If you have separated your Scratch Pad into various categories, click on a category on the left-hand side of the Scratch Pad window to select it.

**Result:** The text for the selected category is displayed on the right-hand side of the Scratch Pad window.

**Note:** If you have not separated Scratch Pad text into Categories, see [Setting Up the Scratch Pad](#) for more information.

4. Highlight the text you want to copy, and press the **Insert Text** button.

**Result:** The highlighted text will be inserted at the current location of your cursor.

**Note:** To have text inserted *WITHOUT* its formatting, click the **Include Formatting** button  to disable it. (This button is enabled as a default.)

5. When finished, click the  at the top right of your Scratch Pad window.

**Result:** The Scratch Pad window closes.

6. Format the inserted text by highlighting it and using the **Format** toolbar.

## Showing Notes on Event Prints

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.

2. Click the **Print Designer** button.

**Result:** The Print Designer window opens.

3. On the left side of the window, click on the title of the print you want to add Notes to.

4. On the lower right of the Print Designer window, remove the check from the checkbox to the right of the **Notes** section.

**Note:** This checkbox will suppress the section; with no check in the box, the **Notes** section will appear on the print.

**Tip:** Event Notes [can be included in Marketing Tools merge documents](#) by clicking the **Insert Fields** button and choosing either the formatted or unformatted option from the Event Fields list.

Event Staffing				<input checked="" type="checkbox"/>
COMMENTS				<input type="checkbox"/>
EVENT NOTES				<input type="checkbox"/>
Event Timeline				<input type="checkbox"/> Suppress Event Timeline Notes
<b>Billing Information</b>				
Subtotal	Paid	Pay Method	Card Number	<input type="checkbox"/>
Tax	Balance	Card Type	None	<input checked="" type="checkbox"/>
Service Charge	None	Card Holder	Expires	<input type="checkbox"/>
Total Value	None	Signature	None	<input checked="" type="checkbox"/>

5. **[Optional]** Click into the gray header box that reads **Event Notes**, and enter new heading text for the section, if desired.
6. When finished, close Print Designer and save your changes.



## Unit 8: Copying Sub-Events, Menus and Events

In this section, you will learn:

- Copying Sub-Events (Meals)
- Copying Menu Items from One Event to Another
- Copying Events



## Copying Sub-Events (or Meals)

The Professional version of the program allows you to quickly copy a sub-event, optionally including menu items and other details. You can even choose whether or not to include each sub-event in your various prints, essentially using them as optional proposed meals to present to your customer.

### Copying Sub-Events (or Meals)

1. In the Event Manager, click the **Sub-Event** button, next to the **Event** button on the left-hand side of your screen.

**Result:** The Event Manager switches to the Sub-Event display.

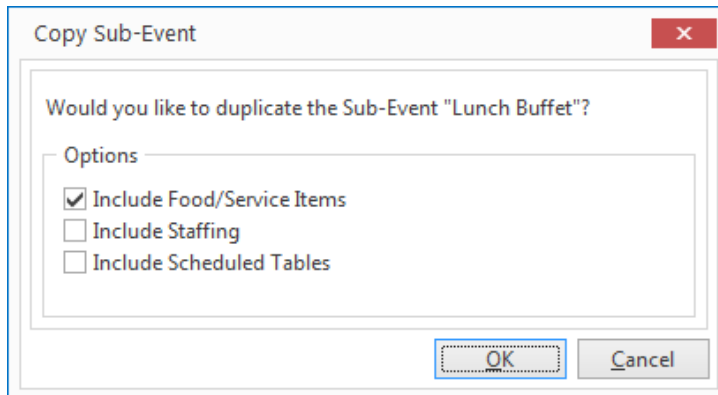
2. Select a sub-event (if more than one) which you wish to copy.

**Note:** The number of sub-events associated with the current event is indicated at the bottom of the sub-event list on the left-hand side of your screen. You can use the navigation bar below the list to scroll through the sub-events.

**Tip:** To include only certain sub-events on event prints, simply hold the **[Shift]** key down on your keyboard as you select the print title.

3. Click the **Copy Sub-Event** button , located to the right of the list of sub-events.

**Result:** A confirmation window opens, with checkbox options.



4. Click into individual checkboxes if you wish to include food/service items, scheduled staff, or Scheduled Items (Tables, Vans, Lanes, etc.).

**Note:** If there is no check in a checkbox, that option will not be included in your copy.

5. Click **OK**.

**Result:** Your sub-event is copied, and you are placed on the new copy.

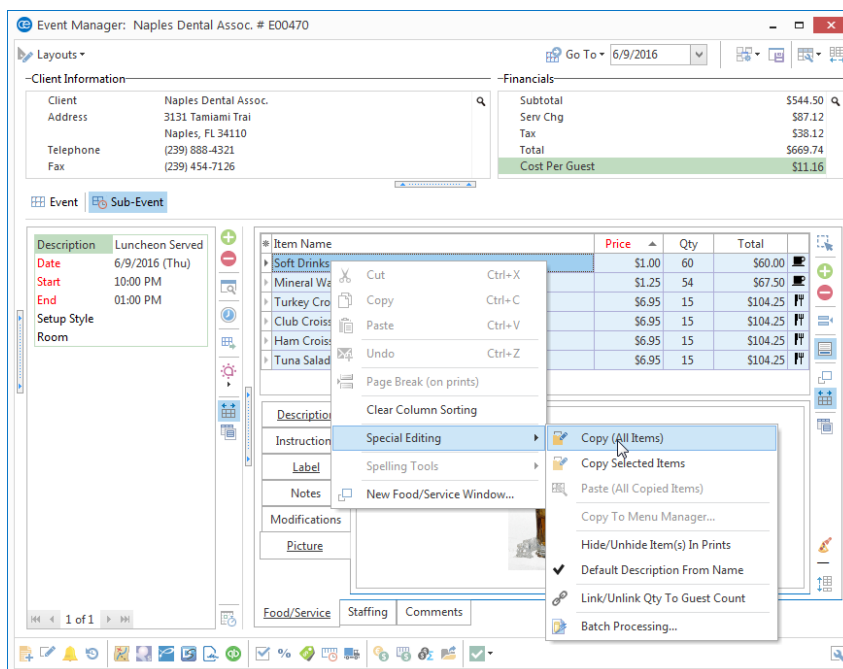
6. Edit the sub-event details (of the copied sub-event) as desired.

## Copying Menu Items from One Event to Another

1. [Optional] On the **Food/Service** tab from a Sub-Event in Event Manager, select the specific menu items you want to copy, holding your **[Ctrl]** or **[Shift]** keys down to select multiple items.

2. Click your right mouse button anywhere within the **Food/Service** grid.

**Result:** A pop-up menu opens.



3. Select **Special Editing > Copy (All Items)** or **Copy Selected Items**.

**Result:** A confirmation message appears.

4. Click **Yes** to confirm your choice.

**Result:** A notification message appears.

5. Click **OK**.

**Result:** Your menu items have been copied into memory (but have not yet been pasted anywhere).

6. Retrieve the event you want to paste your copied menu items into.

7. Click your right mouse button anywhere on the **Food/Service** grid of this event.

**Result:** A pop-up menu opens.

**Note:** You must be viewing the Sub-Event display of Event Manager to access the **Food/Service** tab/-grid.

8. Select **Special Editing > Paste (All Copied Items)**.

**Result:** A confirmation message appears.


9. Click **Yes** to confirm.

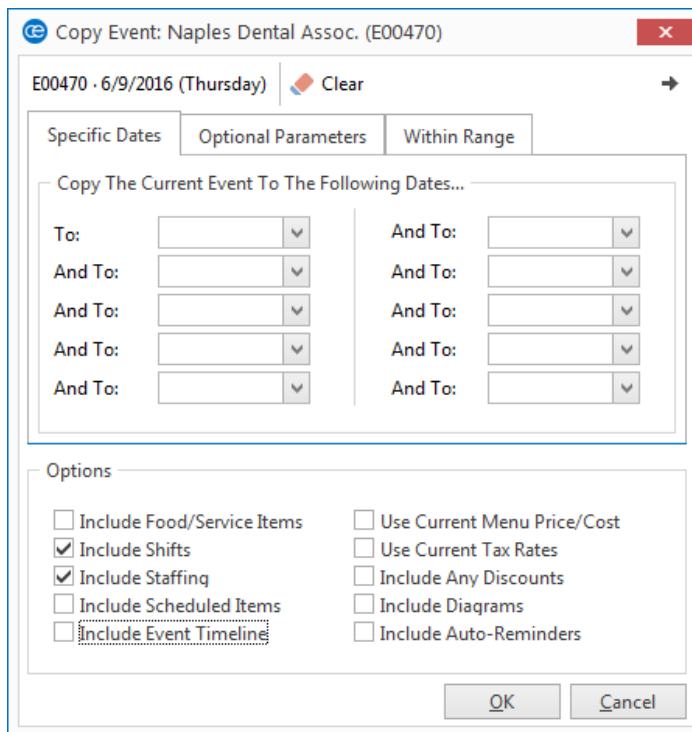
**Result:** Your copied menu items are pasted into this event.

# Copying Events

The powerful Copy Events tool helps you easily handle repeat business by copying an entire party to another date or making it occur at regular intervals (weekly, monthly, etc.). You can even choose specific days of the week on which to have the party recur.

## Copying Events to Specific Dates

1. In Event Manager, search for and retrieve the event you want to copy.
2. Click the **Tools** button at the top of your screen and select **Copy Event**, or click the **Copy Event** button  from the toolbar at the bottom of your screen, depending on your personal configuration.  
**Result:** The Copy Event window opens.
3. Type a date into the first **To** field on the **Specific Dates** tab, or click the down arrow to access the drop-down calendar to make your selection.



4. **[Optional]** Enter more dates as desired to make more than one copy of the event.
5. At the bottom left of the Copy Event window, click into individual checkboxes if you wish to include food/service items, shifts needed, scheduled staff or Scheduled Items (Tables, Vans, Lanes, etc.), or Timeline (Professional version only).  
**Note:** If there is no check in a checkbox, that option will not be included in your copy/copies.
6. At the bottom right of the Copy Event window, choose to update event financial details by using current menu price/cost, using current tax rates, or including any discounts. Also choose to include dia-

grams or automatic reminders (if applicable) in your copy.

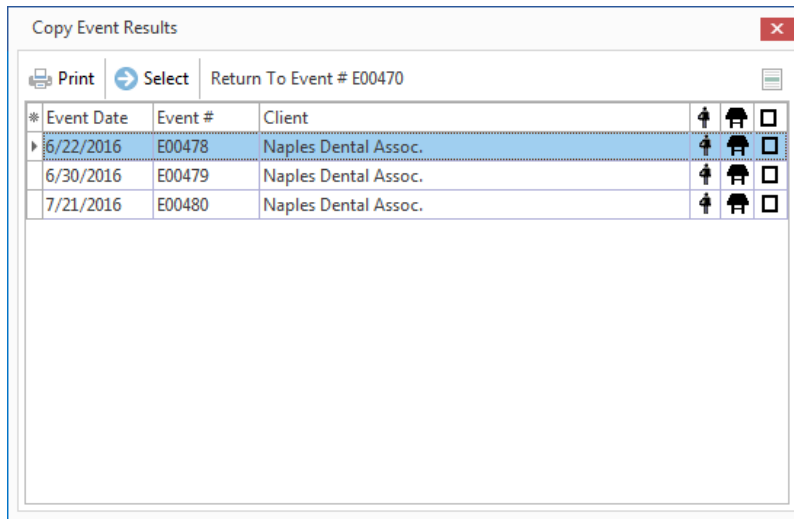
**Note:** If there is no check in a checkbox, that option will not be included in your copy/copies.





7. Click **OK**.

**Result:** A confirmation message appears.


8. Click **Yes** to confirm.

**Result:** Your copies are created, and the Copy Event Results window opens.



**IMPORTANT NOTE:** Your new events have been booked. If there is a red X through the staffing ( , room ( , or scheduled items ( ) icon , a conflict has occurred, and you will receive a warning prompt that the copied event(s) should be edited. (Click the **View Conflicts** button  to see details.) You can print this copy results screen, or simply double-click a new event in the results window to retrieve and edit it while leaving the results window open. (After conflicts are corrected, the Copy Event Results window DOES NOT refresh.)

## Copying Events for Regular Intervals (Monthly, Weekly, etc.)

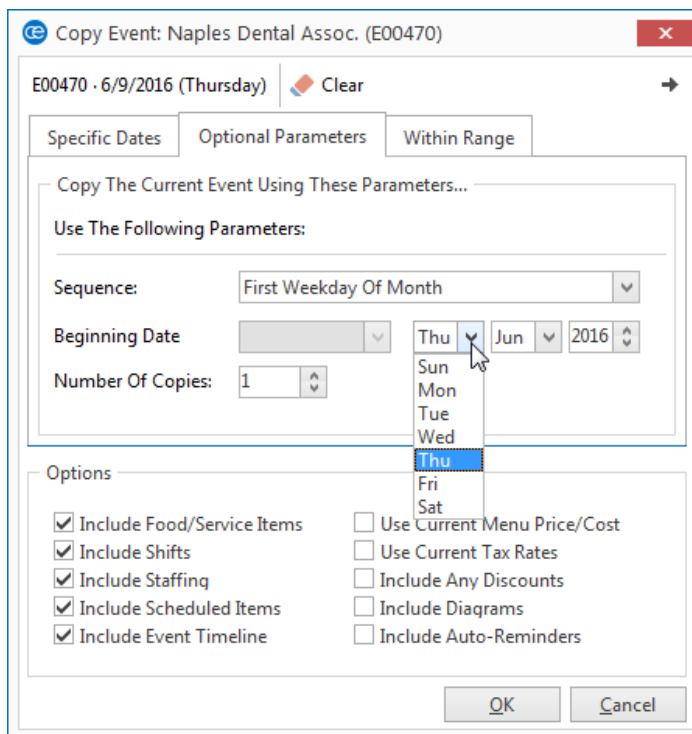
1. In Event Manager, search for and retrieve the event you want to copy.
2. Click the **Tools** button at the top of your screen and select **Copy Event**, or click the **Copy Event** button  from the toolbar at the bottom of your screen, depending on your personal configuration.

**Result:** The Copy Event window opens.

3. Click the **Optional Parameters** tab.
4. Click the down arrow next to the Sequence field.

**Result:** A drop-down list of options appears, allowing you to make the current event weekly, monthly, etc.

5. Choose a sequence for the copy.
- Note:** "Monthly" copies will occur on the same date. To copy to a particular day of the week, choose "First Weekday of Month," etc. ("Weekday" means any day of week, including weekends.)



6. Select a **Beginning Date** or day on which the copy should begin.
- Note:** If copying to "First/Second/Third/Last Weekday of Month," you must pick which day, month, and year you want to begin your copy; for all other sequences, simply pick a date.
7. Enter the number of copies needed into the Number of Copies field, or use the up-and-down arrows to adjust the number.
- Note:** In other words: if copying monthly, how many months should it continue for?

8. At the bottom left of the Copy Event window, click into individual checkboxes if you wish to include food/service items, shifts needed, scheduled staff or Scheduled Items (Tables, Vans, Lanes, etc.), or Timeline (Professional version only).

**Note:** *If there is no check in a checkbox, that option will not be included in your copy/copies.*

9. At the bottom right, choose to update event financial details by using current menu price/cost, using current tax rates or including any discounts. Also choose to include diagrams or automatic reminders (if applicable) in your copy.

**Note:** *If there is no check in a checkbox, that option will not be included in your copy/copies.*

10. Click **OK**.





**Result:** *A confirmation message appears, verifying the copy parameters you have chosen.*

11. Click **Yes** to confirm.


**Result:** *Another confirmation message appears, listing the specific dates your copies will be made for.*

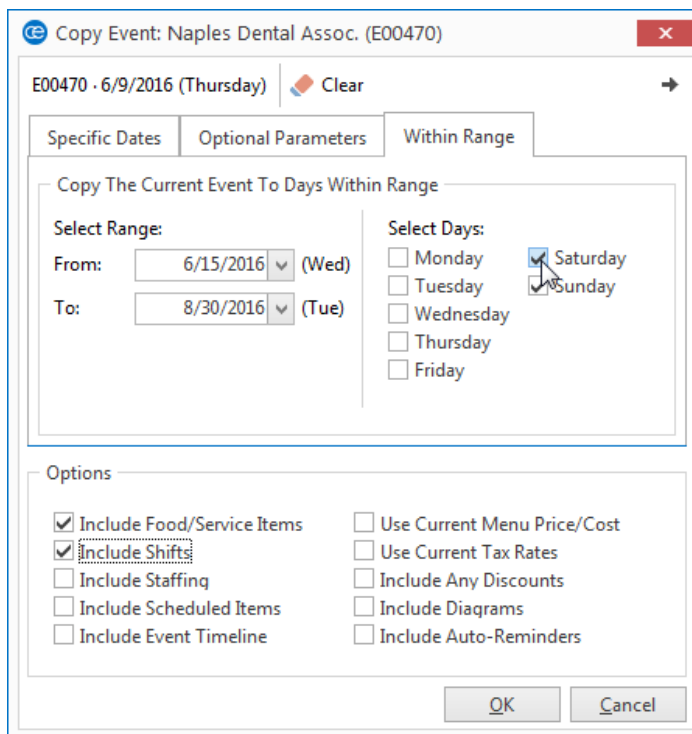
12. Click **Yes** to confirm.

**Result:** *Your copies are created, and a result screen indicates new event numbers and whether any conflicts occurred.*

**IMPORTANT NOTE:** Your new events have been booked. If there is a red X through the staffing ( , room ( , or scheduled items ( ) icon, a conflict has occurred, and the corresponding event(s) should be edited. (Click the **View Conflicts** button  to see details.) You can print this copy results screen, or simply double-click a new event in the results window to retrieve and edit it while leaving the results window open. (After conflicts are corrected, the Copy Results window DOES NOT refresh.)

## Copying to Specific Days of the Week

1. In Event Manager, search for and retrieve the event you want to copy.
2. Click the **Tools** button at the top of your screen and select **Copy Event**, or click the **Copy Event** button  from the toolbar at the bottom of your screen, depending on your personal configuration.  
**Result:** The Copy Event window opens.
3. Click the **Within Range** tab.
4. On the right-hand side of the tab, select the specific days to which you want to copy the event.
5. On the left-hand side of the tab, click the down arrow next to the From field to choose a date to begin the copies.
6. Click the down arrow next to the To field to choose a date to end the copies.  
**Note:** Copies will be created for the days you selected in Step 4 that fall within the date range you selected in Steps 5 and 6.



7. At the bottom left of the Copy Event window, click into individual checkboxes if you wish to include food/service items, shifts needed, scheduled staff or Scheduled Items (Tables, Vans, Lanes, etc.), or Timeline (Professional version only).  
**Note:** If there is no check in a checkbox, that option will not be included in your copy/copies.
8. At the bottom right, choose to update event financial details by using current menu price/cost, using current tax rates or including any discounts. Also choose to include diagrams or automatic reminders (if applicable) in your copy.  
**Note:** If there is no check in a checkbox, that option will not be included in your copy/copies.

9. Click **OK**.





**Result:** A confirmation message appears, verifying the copy parameters you have chosen.

10. Click **Yes** to confirm.

**Result:** Another confirmation message appears, listing the specific dates your copies will be made for.

11. Click **Yes** to confirm.

**Result:** Your copies are created, and a result screen indicates new event numbers and whether any conflicts occurred.

**IMPORTANT NOTE:** Your new events have been booked. If there is a red X through the staffing (  ), room (  ), or scheduled items (  ) icon, a conflict has occurred, and the corresponding event(s) should be edited. (Click the **View Conflicts** button  to see details.) You can print this copy results screen, or simply double-click a new event in the results window to retrieve and edit it while leaving the results window open. (After conflicts are corrected, the Copy Event Results window DOES NOT refresh.)

## Unit 9: Using the Event Checklist

In this section, you will learn:

- Setting Up Default Checklists
- Establishing a Checklist for an Event
- Printing an Event Checklist
- Modifying the Checklist Print
- Running a Checklist Report



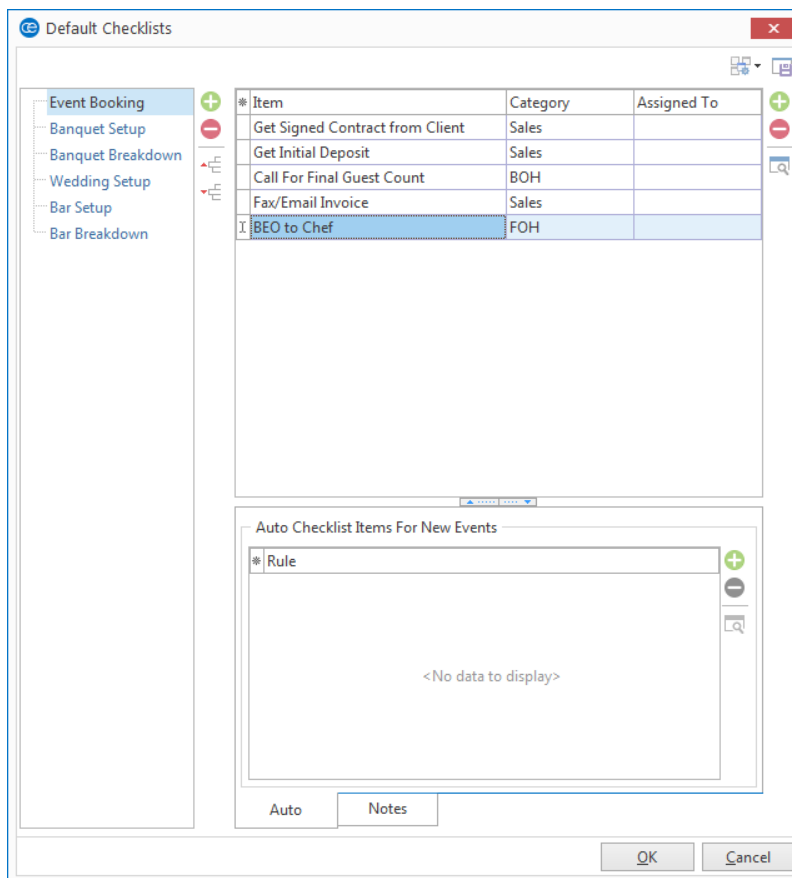
## Creating an Event Checklist of To-Do Items

You can create a checklist of "to-do" items for your various events, either selecting from default lists of tasks or adding a custom task on-the-fly. In addition, you can assign default due dates to these checklist items, telling the program to calculate a certain number of days after the date an event is booked or held, or even having that number conditionally change based on such details as event "theme," "category," "status," etc. Event Checklist items can also be conveniently accessed from the Backstage Tab.

### Adding a New Checklist




1. Click the **Administration** ribbon tab at the top of your screen.
2. Click the **Lists** button and choose **Default Checklists**.

**Result:** The *Default Checklists* window opens.





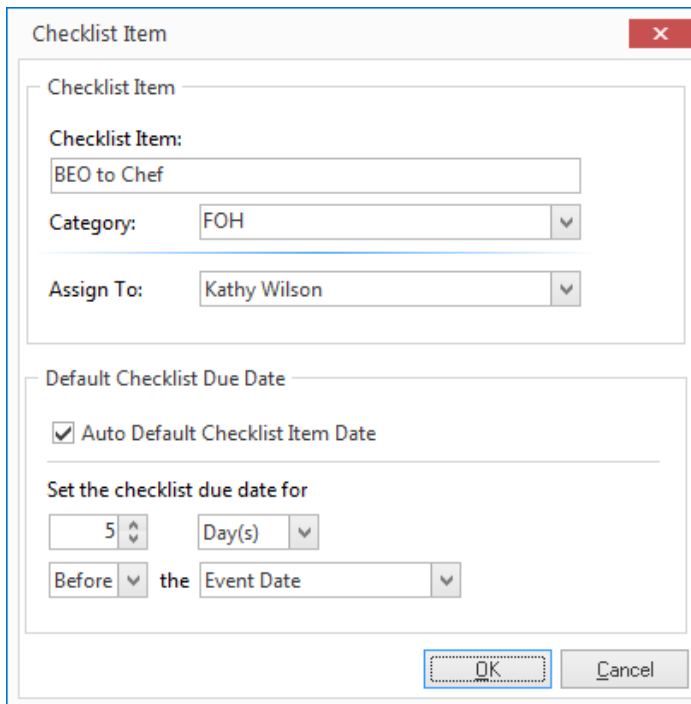
3. Click the **Add New Checklist** button , located on the top left-hand side of the window.  
**Note:** This button is identical to the **Add New Checklist Item** button on the right-hand side of the window; take care not to confuse the two.  
**Result:** A confirmation prompt appears.
4. Click **Yes** to confirm your choice.  
**Result:** A new field is added to the bottom of the list.

5. In the newly created field, type over the name "New Checklist" to rename your new default checklist.
6. Press **[Enter]** to save your new default checklist.
7. **[Optional]** Use the checklist panel, located in the left-hand pane, to modify your checklist.

- **Delete Checklist:** This button  deletes the currently highlighted checklist and all of its items.  
*Note: This function cannot be undone; you will therefore be prompted to confirm your choice.*
- **Move Up:** This button  moves the highlighted checklist up one position in the list.
- **Move Down:** This button  moves the highlighted checklist down one position in the list.
- **Rename Checklist:** This option allows you to rename the checklist. Simply type over the existing name, and then press **[Enter]**.

## Adding a New Checklist Item

1. To add a new item to your default checklist, click the **Add New Checklist Item** button  , located at the top right-hand side of the Default Checklists window.  
**Result:** A blank field is added to the bottom of the list.
2. Type a checklist item into the Item field, and press **[Tab]** or **[Enter]** to move to the next field.
3. Select a Category from the drop-down quickpick list to the right of the field, and press **[Tab]** or **[Enter]**.  
**Note:** You may also type directly into the field.
4. Click the down arrow to the right of the Assigned To field to select, from the quickpick list, the person responsible for the checklist item. (You may also type a name directly into the field.)
5. Click the **View Checklist Item** button  , located on the right-hand side of the window.  
**Result:** The Checklist Item window opens, and any information you entered on the previous screen (Item Name, Category, Assigned To Name) auto-populate.
6. Click into the checkbox next to **Auto Default Checklist Item Date** if you would like to set a due date for the checklist item.  
**Result:** The fields in the **Set the checklist due date for** area become enabled.
7. Indicate the number of days/weeks/months before or after the Booked Date or Event Date you would like the checklist due date to reflect by selecting the options from the drop-down lists.



8. Click **OK**.  
**Result:** You are returned to the Default Checklists window.



9. **[Optional]** Click on the **Notes** tab and enter any desired notes pertaining to the default checklist into the text box.

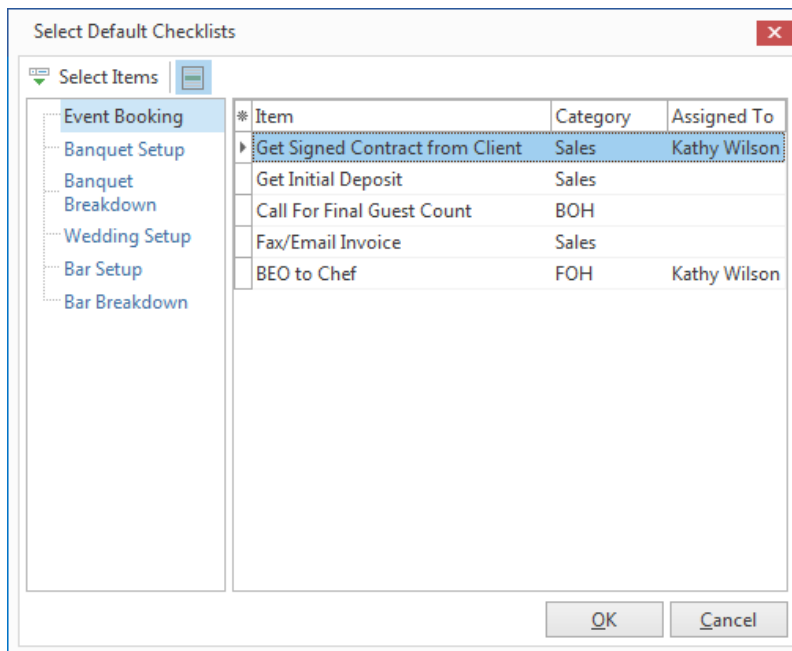
**Note:** *These notes are retrieved into an event along with the checklist. Format the notes by highlighting the text, right-clicking, and selecting **Font**.*

10. Click **OK** to save your work and close the window.

**Tip:** *The steps outlined here, while similar to the steps outlined in the topic below, pertain to a checklist that is not based on "conditions." See the topic below for information about creating a conditional checklist.*

## Retrieving Items from Default Checklists

1. Search for and retrieve the event for which you want to establish a checklist.
2. Click the **Event Checklist** button , located in the toolbar at the bottom of Event Manager. (This button may also be accessed from your **Tools** menu.)  
**Result:** *The Event Checklist window opens.*
3. Click the **View Or Select From Default Checklists** button , located at the top right-hand side of the Event Checklist window.  
**Result:** *The Select Default Checklists window opens.*  
**Note:** *Default checklists eliminate repetitive data entry if you use the same checklist items over and over in your events. If this window is empty, see "Creating an Event Default Checklist," above.*



4. Select a checklist in the left pane of the Select Default Checklists window.  
**Result:** *The right-hand panel of the window updates to reflect the specific items in the list you've selected.*
5. Highlight one or more checklist items.  
**Note:** *Highlight multiple items by holding your mouse button down and dragging, or holding your [Ctrl] key down as you select.*
6. Click **OK**.  
**Result:** *The Select Default Checklists window closes, and selected items are entered into the Event Checklist window.*  
**Note:** *As an alternative, drag and drop selected items into the Event Checklist window or click the **Select Items** button to retrieve checklist items while leaving the Select Default Checklists window open.*

7. Click into the Due date field for a particular item and type the date the task should be performed by (or click the down arrow to access the drop-down calendar).

**Note:** The Due date may default based on settings established in your default checklists.

8. **[Optional]** Click into the Assigned To field and type the name of the person responsible for this item, or click the down arrow to choose a name from the corresponding list.


**Note:** This name may have defaulted from your default checklist.

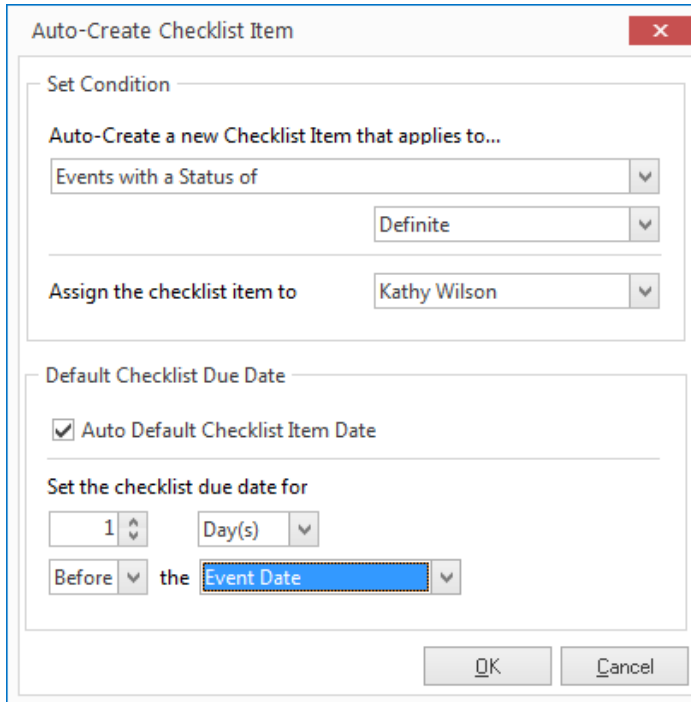
9. **[Optional]** When an item has been completed, click into the corresponding checkbox to the left of the Done On field.

**Result:** The current date is automatically entered in the *Done* column, and the checklist item is designated as having been completed.

**Note:** As an option, click the **Show Done/Not Done Tree** button  to group items in this grid by their completion status.

## Making Checklist Items Conditional

1. Follow the steps on page 133 to create a checklist.
2. Click the **Add Automatic Item** button , located on the right-hand side of the **Auto** tab.  
**Result:** The *Auto-Create Checklist Item* window opens.




3. Click the down arrow below the **Auto-Create a new Checklist Item that applies to...** heading to create a condition for all events or for specific events based on Status, Category, Theme, etc.  
**Note:** A second drop-down list is not available for **All Events**.
4. Click the down arrow to the right of the **Assign the checklist item to** area, and choose the person to whom this checklist item is being assigned.
5. Click into the **Auto Default Checklist Due Date** checkbox.  
**Result:** The Set the checklist due date for fields are now enabled.
6. Indicate the number of days/weeks/months before or after the Booked Date or Event Date you would like the checklist due date to reflect by selecting the options in the **Set the checklist due dates for** area.
7. Click **OK** to save your changes and close the Auto-Create Checklist Item window.
8. **[Optional]** Click on the **Notes** tab and enter any desired notes pertaining to the auto-checklist into the text box.  
**Note:** These notes are retrieved into an event along with the checklist item.
9. When finished, click **OK** at the Default Checklists window.

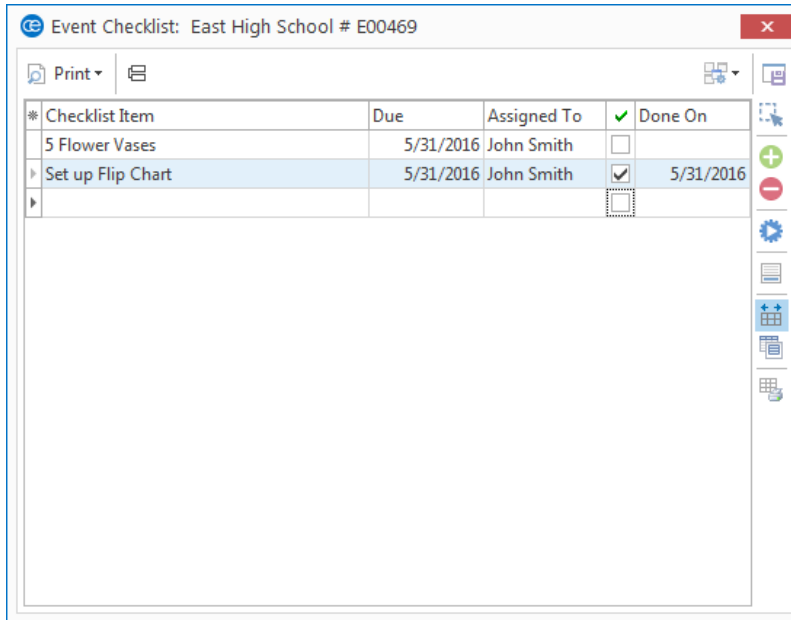
## Adding a Conditional Auto-Checklist to an Event

1. Retrieve the event for which you want to establish an auto-checklist.
  2. Click the **Event Checklist** button , located at the bottom of Event Manager.  
**Result:** The Event Checklist window opens.
  3. Click the **Auto Create Event Checklist Items** button , located on the right-hand side of the Event Checklist window.  
**Result:** A confirmation window opens.
  4. Click **Yes** to confirm your choice.  
**Result:** An informational prompt appears.
  5. Click **OK** at the information prompt.  
**Result:** The previously created default checklist displays in the window.
  6. **[Optional]** Click the **Quick Column Customizing** button  to add or remove headings from the checklist.
  7. Click in the Due date field for a particular item and type the date the task should be performed by (or click the down arrow to use the drop-down calendar).  
**Note:** The Due date may default based on settings established in your default checklists.
  8. **[Optional]** Click into the Assigned To field and type the name of the person responsible for this item, or click the down arrow to choose a name from the corresponding list.  
**Note:** This name may have defaulted from your default checklist.
  9. **[Optional]** When an item has been completed, click into the corresponding checkbox to the left of the Done On column.  
**Result:** The current date is automatically entered in the Done On column, and the checklist item is designated as having been completed.
- Note:** As an option, click the **Show Done/Not Done Tree** button  to group items in this grid by their completion status.


**Tip:** You can determine what columns are displayed on the Event Checklist grid by clicking the **Quick Column Customizing** button at the far left of the column headings. Delete a checklist item by selecting it and clicking the **Delete Current Checklist Item** button.

## Adding Unique Checklist Items by Hand

1. Search for and retrieve the event for which you want to establish a checklist.
2. Click the **Event Checklist** button , located at the bottom left-hand side of Event Manager.  
**Result:** *The Event Checklist window opens.*



* Checklist Item	Due	Assigned To	✓	Done On
5 Flower Vases	5/31/2016	John Smith	<input type="checkbox"/>	
Set up Flip Chart	5/31/2016	John Smith	<input checked="" type="checkbox"/>	5/31/2016
			<input type="checkbox"/>	

3. Click the **Add A New Checklist Item** button , located on the right-hand side of the window.  
**Result:** *A blank line is added to the bottom of the Event Checklist grid.*
4. Type a description of the item into the Checklist Item field.
5. Press your **[Enter]** key.  
**Result:** *Your cursor moves to the Due date field.*
6. Type the date the task should be performed by, or click the down arrow to access the drop-down calendar.
7. Press **[Enter]** again.  
**Result:** *Your cursor moves to the Assigned To field.*
8. **[Optional]** Click into the Assigned To field and type the name of the person responsible for this item, or click the down arrow to choose a name from the corresponding quickpick list.
9. **[Optional]** When an item has been completed, click into the corresponding checkbox to the left of the Done On column.  
**Result:** *The current date is automatically entered in the Done On column, and the checklist item is designated as having been completed.*

**Note:** As an option, click the **Show Done/Not Done Tree** button  to group items in this grid by their completion status.

## Printing a Checklist for an Event

1. With your event open in Event Manager, click the bottom half of the **Prints** button in the **Home** ribbon tab at the top of your screen.

**Result:** A drop-down list of options appears.

2. Click **EventSubprints > Event Checklist**.

**Result:** The Event Checklist subprint opens.

**Note:** This print (and other miscellaneous event sub-prints) can be customized using the Miscellaneous Prints Designer.

**Tip:** If your Event Checklist window is open in Event Manager, you can simply click the **Print** button at the top left of the window to generate the print. Otherwise, you can follow the steps below.

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**Event Checklist**

Client/Organization Glessing Wedding	Event Date 4/7/2016 (Thu)	Booking Contact Michelle Glessing	Site Contact Scott Glessing	Event # E00027
Address 7432 Dupont Ave. S, Naples, FL 34106		Telephone (813) 341-0444	Theme Wedding Reception	Guests 210 (Act)
Party Name Glessing/Jones Wedding Reception	Theme Wedding Reception	Category Group Sales	Sales Rep Kathy Wilson	

**Not Done**

Checklist Item	Due	Assigned To	Done	Done By
<b>BDH</b>				
Dance Floor	6/4/2016	John Smith		
Room Dividers	6/4/2016	John Smith		
Outside Smoking Section	6/4/2016	Kathy Wilson		
Champagne Toast Prep	6/4/2016	Jo Ann Mulnix		
Spot Light Check	6/4/2016	John Smith		
Microphone Test	6/4/2016	John Smith		
<b>EDH</b>				
Table Cards	6/4/2016	Kathy Wilson		
Displays	6/4/2016	Jo Ann Mulnix		

# Generating the Event Checklist Report

This report lists all duties that pertain to events taking place on the day or date range you indicate. Fields printed include Checklist Item; Due Date; Assigned To; Done On; Done By; Event Information.

## Generating the Event Checklist Report

1. Click the **Reports** ribbon tab at the top of the screen.
2. Click the **Activity** button and choose **Event Checklist**.  
**Result:** The Event Checklist window opens, where you can select your report parameters.

**Tip:** As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

The screenshot shows the 'Event Checklist' window with the following settings:

- Date Range:**
  - ☐ Less Than Or Equal To
  - ☐ Greater Than Or Equal To
  - ☐ Within Date Range
  - ☒ Relative Date Range: This month
- Title:** Event Checklist
- Options:**
  - Exclude Status: Cancelled
  - ☐ Include Done Items
  - ☐ Show Notes
  - ☐ Group By Done/Not Done
  - ☐ Show Colors
  - ☐ Group By Category
- ☐ Close After Printing
- Buttons:** OK, Cancel

3. Set a **Date Range** for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.
4. **[Optional]** Change the title of the report by highlighting the words "Event Checklist" and typing directly into the field.
5. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.  
**Note:** Placing a check in a box causes the tool to exclude events with that status from your results.
6. **[Optional]** Select other available options from the left-hand side of the screen to **Include Done Items** or to **Group by Done/Not Done** or by **Group by Category**.

7. **[Optional]** Click into the **Show Notes** checkbox if you would like notes to that were included for the checklist item display on the report.
8. **[Optional]** Click into the **Show Colors** checkbox if you would like completed tasks to display in black font and tasks that have not been completed to display in red font.
9. When finished setting your report parameters, click **OK**.  
**Result:** *The Event Checklist Report is generated, incorporating the parameters you established.*

## Unit 10: Using the Event Timeline

In this section, you will learn:

- Setting Up Default Timeline Lists
- Establishing a Timeline for an Event
- Setting Times for Individual Menu Items
- Printing an Event Timeline
- Adding the Timeline to the Contract

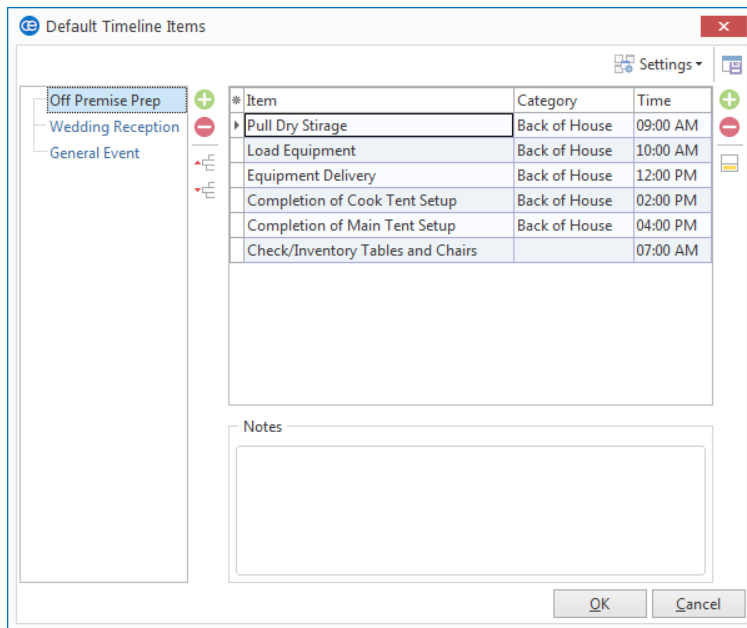



## Creating a Detailed Event Timeline





In addition to the various time fields available in Event Manager, several of which can be renamed, you can also create a detailed timeline unique to each party. For example, elaborate events such as wedding receptions may require a longer list of times, including times for such things as Best Man's Toast, Father/Daughter Dance, Cake Cutting, and more. You can either create these times on-the-fly within an event, or you can select them from default lists.

### Creating an Event Default Timeline


1. Click the **Administration** ribbon tab at the top of your screen.
2. Click the **Lists** button and choose **Default Timeline Items**.  
**Result:** *The Default Timeline Items window opens.*




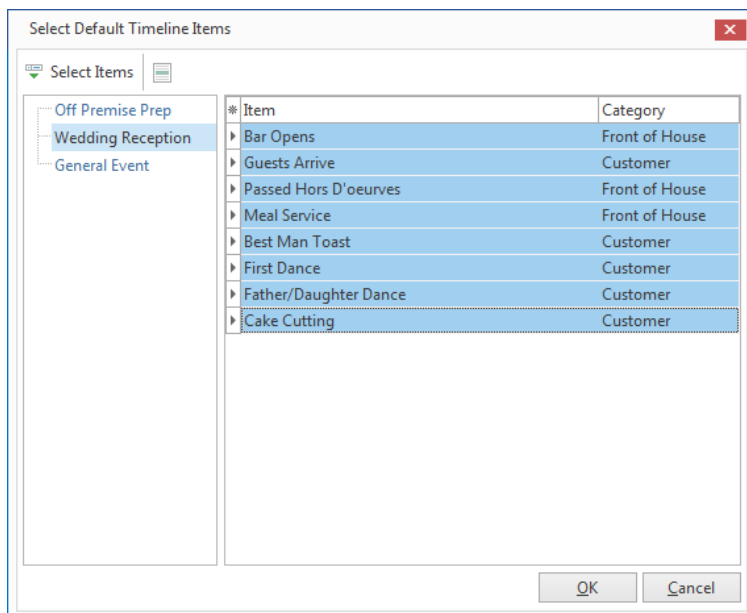
3. Click the **Add New Timeline** button , located on the left-hand side of the window.  
**Note:** *This button is identical to the **Add New Timeline Item** button on the right-hand side of the screen, so do not confuse the two.*  
**Result:** *A confirmation prompt displays.*
4. Click **Yes** to confirm your choice.  
**Result:** *A new field is added to the bottom of the list.*
5. In the newly created field, type over the name "New List" to rename your new default timeline.
6. Press **[Enter]** to save your new default timeline.
7. **[Optional]** Use the timeline panel, located in the left-hand pane, to modify your checklist.

- **Delete Timeline:** This button  deletes the currently highlighted checklist and all of its items.  
*Note: This function cannot be undone; you will be prompted to confirm your choice.*
  - **Move Up:** This button  moves the highlighted timeline up one position in the list.
  - **Move Down:** This button  moves the highlighted timeline down one position in the list.
  - **Rename Timeline List:** This option allows you to rename the timeline. Simply type over the existing name, and then press **[Enter]**.
8. To add a new item to your default timeline, click the **Add New Timeline Item** button , located at the top right-hand side of the Default Timeline Items window.  
*Result: A blank field is added to the bottom of the list.*
  9. Type a timeline item into the Item field and press **[Tab]** or **[Enter]** to move to the next field.
  10. Select a Category from the drop-down quickpick list to the right of the field, and press **[Tab]** or **[Enter]**.  
*Note: You may also type directly into the field.*
  11. In the Time field, type the time the timeline item is due or use the up-and-down arrows to select a time.
  12. Repeat Steps 8-11 until you have finished creating your default timeline.
  13. **[Optional]** Click the **Notes** text block and enter any desired notes pertaining to the default timeline.  
*Note: These notes are retrieved into an event along with the timeline. Format the notes by highlighting the text, right-clicking, and selecting **Font**.*
  14. Click **OK** to save your work and close the window.

## Retrieving Items from Default Timelines

1. Retrieve the event for which you want to establish a timeline.
2. Click the **Event Timeline** button , located in the toolbar at the bottom of Event Manager. (This button can also be accessed from the Tools menu at the top of your screen.)  
**Result:** *The Event Timeline window opens.*

3. Click the **View Or Select From Default Timeline Items** button , located at the top right-hand side of the Event Timeline window.  
**Result:** *The Select Default Timeline Items window opens.*  
**Note:** *Default timelines eliminate repetitive entry if you use the same timeline items over and over in your events. If this window is empty, you must first create default timeline lists from which to choose these items.*



4. Select a list in the left pane of the Select Default Timeline Items window.  
**Result:** *The right panel of the window updates to reflect the specific items in the list you've selected.*
5. Highlight one or more timeline items.  
**Note:** *Highlight multiple items by holding your mouse button down and dragging, or holding your [Ctrl] key down as you select.*
6. Click **OK**.  
**Result:** *The Select Default Timeline Items window closes, and selected items are entered into the Event Timeline window.*  
**Note:** *As an alternative, drag and drop selected items into the Event Timeline window or click the **Select Items** button to retrieve checklist items while leaving the Select Default Timeline Items window open.*

7. Click into the Time field for a particular item and enter a time, or use the up-and-down arrows to adjust by one hour.

**Note:** *The Time may default based on settings established in your default timeline lists.*


8. **[Optional]** Enter a Category to use for future tracking of this item, or click the down arrow to choose a name from the corresponding quickpick list.

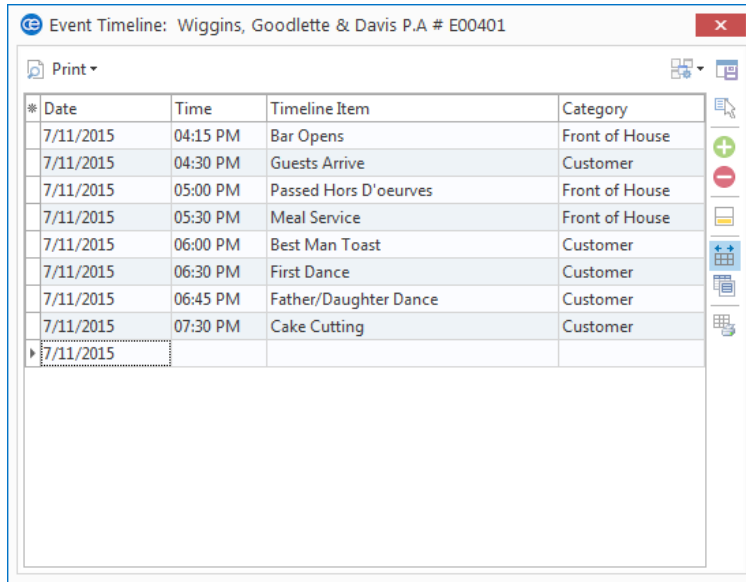
**Note:** *This "Category" may have defaulted from your default timeline list. The drop-down list of options can be customized in your program's quickpick lists.*

9. **[Optional]** Click **Print** at the top left of the Event Timeline window to print the timeline.


**Note:** *This print can be modified in your program's Miscellaneous Print Designer.*

## Adding Unique Timeline Items by Hand


1. Retrieve the event for which you want to establish a checklist.
2. Click the **Event Timeline** button , located in the toolbar at the bottom of Event Manager.  
**Result:** *The Event Timeline window opens.*

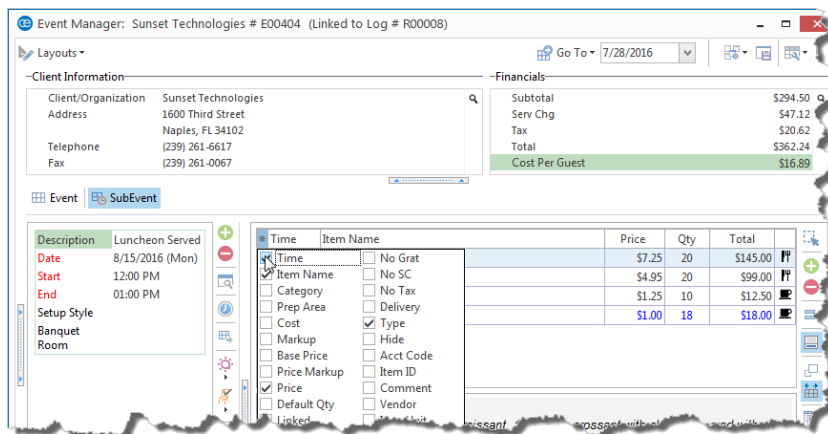


* Date	Time	Timeline Item	Category
7/11/2015	04:15 PM	Bar Opens	Front of House
7/11/2015	04:30 PM	Guests Arrive	Customer
7/11/2015	05:00 PM	Passed Hors D'oeuvres	Front of House
7/11/2015	05:30 PM	Meal Service	Front of House
7/11/2015	06:00 PM	Best Man Toast	Customer
7/11/2015	06:30 PM	First Dance	Customer
7/11/2015	06:45 PM	Father/Daughter Dance	Customer
7/11/2015	07:30 PM	Cake Cutting	Customer
7/11/2015			

3. Click the **Add A New Timeline Item** button  on the right-hand side of the window.  
**Result:** *A new, blank record is added to the Event Timeline window.*
4. Type a time for the item, and press your **[Enter]** key.  
**Result:** *Your cursor moves to the Timeline Item field.*
5. Type the name of the item, and press **[Enter]** again.  
**Result:** *Your cursor moves to the Category field.*
6. **[Optional]** Enter a Category to use for future tracking of this item, or click the down arrow to choose a name from the corresponding quickpick list.  
**Note:** *This "Category" may have defaulted from your default timeline list. The drop-down list of options can be customized in your program's quickpick lists.*
7. **[Optional]** Click **Print** at the top left of the Event Timeline window to print the timeline.  
**Note:** *This print can be modified in your program's Miscellaneous Prints Designer.*

## Adding Times to a Food/Service Item

1. Confirm the **Food/Service** tab is currently selected at the bottom of your **Sub-Event** display in Event Manager.
2. Click the **Quick Column Customizing** button , located at the top left of the Food/Service grid.  
**Result:** A drop-down list of optional columns appears.
3. Click into the checkbox next to the **Time** field.  
**Result:** The time column is added to the Food/Service grid.



4. Enter the desired time into the **Time** field.  
**Note:** Use the up-and-down arrows to adjust the AM/PM setting.
5. Click the bottom half of the **Prints** button, located at the top of your CaterEase screen.
6. Select **Event Subprints > Event Timeline**.  
**Note:** You may need to modify the print to display your menu times. See the topic below.

**Tip:** If you want the Time column to be displayed in the Food/Service grid as a default, click the **Save Current Window Settings** button at the top right of the Event Manager window.

## Printing a Timeline for an Event

1. With your event open in Event Manager, click the bottom half of the **Prints** button in the **Home** ribbon tab at the top of the screen.

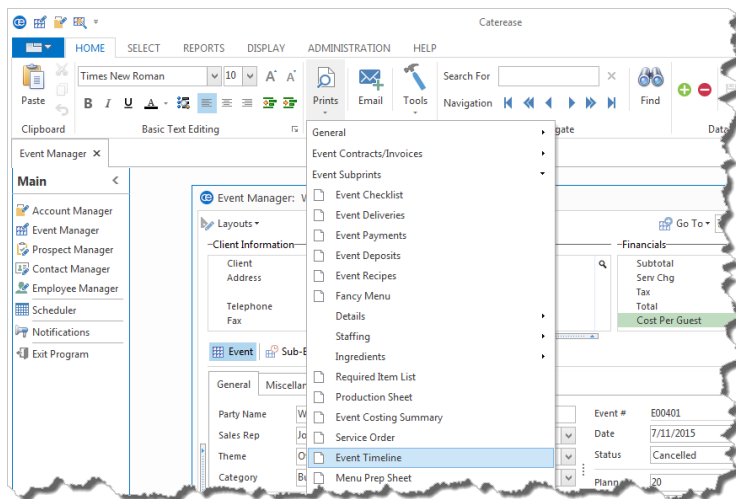
**Result:** A drop-down list of options appears.

**Note:** You can also click the top of the **Prints** button to get a print selection window, and then choose the **Subprints** tab and move on to Step 3, below.

2. Click **Event Subprints**.

**Result:** Another drill-down list appears.

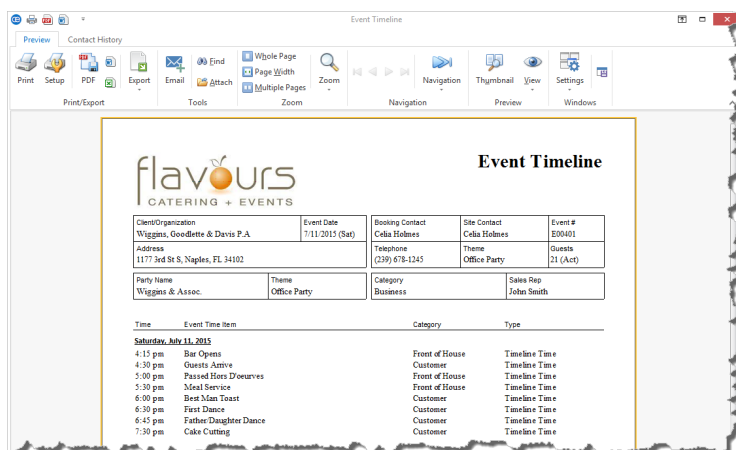
**Tip:** If your Event Timeline window is open in Event Manager, you can simply click the **Print** button at the top left to generate the print. Otherwise, you can follow the steps below.



3. Choose **Event Timeline**.

**Result:** A preview window for the print appears.

**Note:** This print (and other miscellaneous event sub-prints) can be customized using the Miscellaneous Prints Designer.



4. Click the **Print** button at the top of the print preview screen to send the print to a printer.

## Showing Event Timelines on Other Event Prints

1. In the Print Designer, locate the **Event Timeline** section towards the bottom of the print.

The screenshot shows the 'Print Designer' window for 'flavours CATERING + EVENTS'. The 'Event Timeline' section is highlighted with a red circle at the bottom of the form. The form includes various sections like Client Information, Site Locations, Food/Service Items, and a bottom summary section with Subtotal, Tax, and Total Value.

**Tip:** You can determine what columns are displayed on the Event Timeline grid by clicking **Quick Column Customizing** button at the far left of the column headings. Delete a timeline item by selecting it and clicking the **Delete Current Timeline Item** button.

2. To display the timeline on the print, ensure the Event Timeline has not been suppressed, i.e., that the checkboxes next to the timeline and timeline notes do not contain a check mark.

**Note:** An timeline must exist in Event Manager for this event in order for the timeline and associated notes to display on the print.

Event Timeline			
Time	Timeline Item	Category	
Saturday, July 11, 2015			
4:15 pm	Bar Opens	Front of House	
4:30 pm	Guests Arrive	Customer	
5:00 pm	Passed Hors D'oeuvres	Front of House	
5:30 pm	Meal Service	Front of House	
6:00 pm	Best Man Toast	Customer	
6:30 pm	First Dance	Customer	
6:45 pm	Father/Daughter Dance	Customer	
7:30 pm	Cake Cutting	Customer	
Subtotal	\$394.50	Paid	\$0.00
Tax	\$27.62	Balance	\$485.24
Service Charge	\$63.12		
Total Value	\$485.24		

Pay Method	Credit Card	Card Number
Card Type		Expires
Card Holder		
Signature		

3. If you do not want to display the timeline notes, click into the checkbox to the left of **Suppress Event Timeline Notes**.

**Result:** Any timeline notes that have been entered into the event within Event Manager will not display on the print.

4. If you do not want to display the timeline, click the box on the far right-hand side of the screen.

**Result:** Neither the timeline nor the timeline notes entered into the event within Event Manager will display on the print.

## Unit 11: Managing Event Tax and Service Charge Rates

In this section, you will learn:

- Establishing Default Tax Rates
- Creating Multiple Tax Schedules
- Renaming Tax/Service Charge/Gratuity Names
- Managing Tax Rates for an Event



## Establishing Default Tax Rates

You can easily establish or edit the default tax, service charge, and gratuity rates for all new events booked in the program. In addition, you can create multiple tax schedules and assign them to individual customers or site locations used for an event.

Note: Any changes to default tax/service charge rates affect events booked in the future; events currently in the program will not be automatically affected.

### Setting Tax/Service Charge Rates

1. Click the **Administration** ribbon tab at the top of your screen.
2. Click **General > Tax/Service Charge Rates**.

**Result:** The *Default Tax & Service Charge Rates* window opens.

Default Tax & Service Charge Rates

→ Tax Schedules

By Food/Service Item Type      Enter As Percentage (10.250 = 10.25%)

	First	Second	Third	Gratuity	Tax Grat At New Rate	Serv Chg At New Rate	Tax Serv Chg At New Rate
Food	7	0	0	0	0	16	0
Beverage	7	0	0	0	0	16	0
Liquor	7	0	0	0	0	16	0
Equipment	7	0	0	0	0	16	0
Labor	7	0	0	0	0	16	0
Room	7	0	0	0	0	16	0
Other	7	0	0	0	0	16	0
NA	0	0	0	0	0	0	0

**Tax Exempt**

☐ Tax Exempt

Exempt #:

Expires:

**Additional Adjustments**

Subtotal: \$0.00

First: \$0.00

Second: \$0.00

Third: \$0.00

Gratuity: \$0.00

Service Charge: \$0.00

Item Codes:

OK      Cancel

3. Enter a new tax rate for your **Food** items by typing numbers into the Food field as desired.  
**Note:** The up-and-down arrows next to the rate adjust it one-hundredth (.01) of a percent.
4. Press your **[Enter]** key to move to the next field (the Beverage field).
5. Continue to enter default tax rates as desired for all food/service item types.  
**Note:** Individual menu items can be designated as exempt from tax, service charge, and/or gratuity in Menu Manager. For example, even if you establish a default tax rate for "Equipment" items here, you can make individual items tax-exempt in your default menus (or on-the-fly, within an event).

6. **[Optional]** Continue to add rates into the second and third tax columns as desired.  
**Note:** *Multiple tax rates are often used by European or Canadian companies, and can also be used in the United States to track separate "City," "State," and "County" taxes.*
7. Continue to add rates for default **Gratuity** and/or **Service Charge** for each type of menu item by typing into their respective columns.
8. **[Optional]** Click into the checkbox labeled **Tax Grat** or **Tax Serv Chg** at the top of the fifth or seventh column, respectively, to apply a tax to your gratuity or service charge rates.  
**Result:** *The gratuity or service charge of each new event will be taxed at the rate or rates you have set on this screen.*  
**Note:** *If you wish to establish a new unique tax rate to apply to the gratuity or service charge, click into the checkbox labeled **At New Rate** at the top of the fifth or seventh column and set the new rate manually.*
9. **[Optional]** Click into the checkbox labeled **Tax Exempt** at the bottom left of the window to make all new orders in your program default to tax-exempt.  
**Note:** *Individual events can be designated as tax-exempt, as well.*
10. **[Optional]** Enter whole dollar amounts in any of the fields listed under **Additional Adjustments** (lower right of window) to add that amount to the subtotal, tax, gratuity, or service charge of all new events.  
**Note:** *These adjustments can also be made within individual events.*
11. Click the **OK** button at the bottom right of the window when finished.

## Creating Multiple Tax Schedules

1. Click the **Tax Schedules** button at the top right of the Default Tax & Service Charge Rates window.  
**Result:** The window expands to expose a new pane on the right-hand side.

The screenshot shows the 'Default Tax & Service Charge Rates' window. The 'Tax Schedules' pane is expanded on the right, showing a list of schedules: 'Primary' (with a green plus icon) and 'Collier County' (with a red minus icon). The main window contains a table for setting rates by Food/Service Item Type. The table has columns for First, Second, Third, Gratuity, Tax Grat, At New Rate, Serv Chg, and Tax Serv Chg. The 'Tax Schedules' pane also includes a search field and a list of item codes.

By Food/Service Item Type	First	Second	Third	Gratuity	Tax Grat	At New Rate	Serv Chg	Tax Serv Chg
Food	7	0	0	0	0	0	16	0
Beverage	7	0	0	0	0	0	16	0
Liquor	7	0	0	0	0	0	16	0
Equipment	7	0	0	0	0	0	16	0
Labor	7	0	0	0	0	0	16	0
Room	7	0	0	0	0	0	16	0
Other	7	0	0	0	0	0	16	0
NA	0	0	0	0	0	0	0	0


Additional Adjustments:

Subtotal	First	Second	Third	Gratuity	Service Charge
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Item Codes:

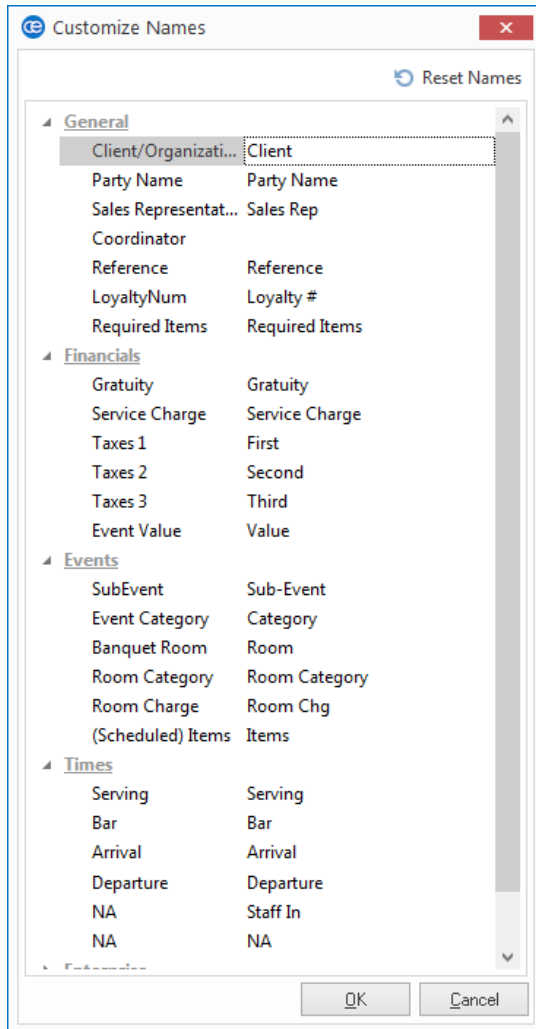
Item Codes

Buttons: OK, Cancel

2. Click the **Add Tax Schedule** button .  
**Result:** A confirmation prompt appears.
3. Click **Yes**.  
**Result:** A new tax schedule is added to the pane on the right of the window, with your cursor positioned to enter a new name.
4. Type a name for your new schedule, and press your **[Enter]** key.  
**Result:** Your new schedule name is saved.
5. Enter tax, gratuity, and service charge rates as described in "Setting Tax/Service Charge Rates," above.  
**Note:** Specific tax schedules can be linked to individual customers or to individual site locations. Otherwise, new events will default to reflect your "primary" schedule.
6. Repeat to add additional schedules, or click the **OK** button at the bottom right of the window when finished.  
**Note:** You are able to incrementally search for your tax schedules by typing into the Search field, located at the upper right-hand side of the extended Tax Schedules window.

## Renaming Tax Names

1. Click the **Administration** ribbon tab and choose **General > Customize Names**.
2. In the **Financials** group, click into the Tax 1, Tax 2, and/or Tax 3 fields, and type new names as desired.  
**Note:** You can rename "Gratuity" and "Service Charge" here, as well.




3. When finished, click **OK**.

## Setting Event Tax Rates

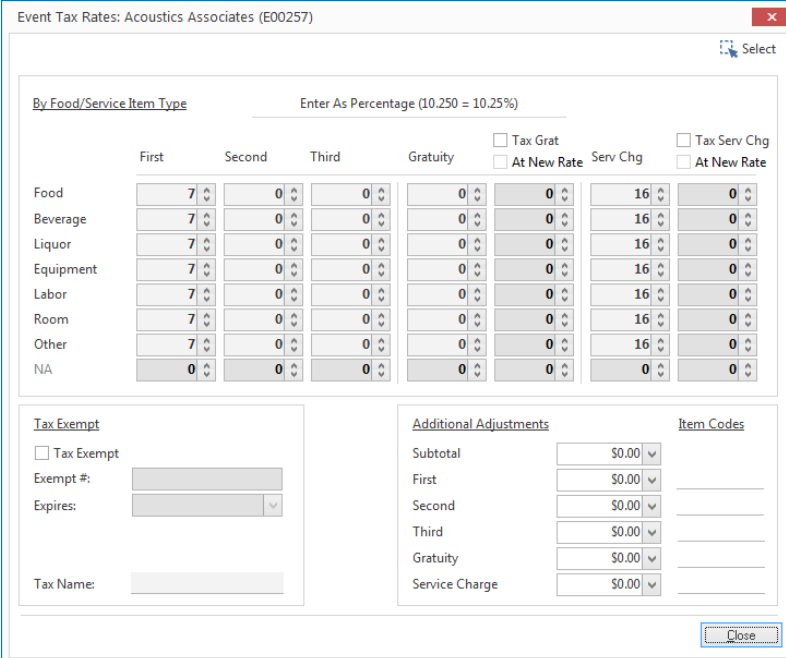
New events automatically assume the default tax/service charge/gratuity rates you have established in your program's setup, or they can pull in a unique tax schedule that might be applied to a client or site location. In either case, rates can be easily edited on-the-fly within an event.

### Editing Event Tax/Service Charge Rates

1. In the Event Manager, retrieve the event for which you want to edit rates.
2. Click the **Tax Rates** button , located in the toolbar at the bottom of your display or, depending on your personal configuration, click the **Tools** button at the top of your screen to access the **Tax Rates** button from the list of drop-down options.

**Result:** The Event Tax Rates window opens.

**Note:** When this event was added to your program, these rates defaulted to your program's default tax rates



Event Tax Rates: Acoustics Associates (E00257)

By Food/Service Item Type      Enter As Percentage (10.250 = 10.25%)

	First	Second	Third	Gratuity	<input type="checkbox"/> Tax Grat <input type="checkbox"/> At New Rate	Serv Chg	<input type="checkbox"/> Tax Serv Chg <input type="checkbox"/> At New Rate
Food	7	0	0	0	<input type="checkbox"/>	16	0
Beverage	7	0	0	0	<input type="checkbox"/>	16	0
Liquor	7	0	0	0	<input type="checkbox"/>	16	0
Equipment	7	0	0	0	<input type="checkbox"/>	16	0
Labor	7	0	0	0	<input type="checkbox"/>	16	0
Room	7	0	0	0	<input type="checkbox"/>	16	0
Other	7	0	0	0	<input type="checkbox"/>	16	0
NA	0	0	0	0	<input type="checkbox"/>	0	0

**Tax Exempt**

☐ Tax Exempt

Exempt #:

Expires:

Tax Name:

**Additional Adjustments**

Subtotal:       Item Codes:

First:       Item Codes:

Second:       Item Codes:

Third:       Item Codes:

Gratuity:       Item Codes:

Service Charge:       Item Codes:

Close

3. Click into any field and edit as desired.  
**Note:** Up to three separate taxes, a gratuity and a service charge can be assigned to each type of food or service item. You can type in a field to enter information, or use the arrows next to a field to adjust the rate one percent or one-hundredth (.01) of a percent.
4. Press your **[Enter]** key to move from field to field.  
**Note:** See topics below for details on taxing gratuity/service charge, making an event tax exempt, adding additional adjustments, or selecting optional tax schedules.

### Applying Tax on Gratuity or Service Charge

1. Access the Event Tax Rates window as shown above.

2. Click into the checkbox labeled **Tax Gratuity** or **Tax Serv Chg**, at the top right of the Event Tax Rates window.  
**Result:** *Your event's gratuity or service charge is now taxed at the tax rate(s) you have established.*  
**Note:** *If you do not want to set a unique tax rate for your service charge, you can skip Steps 3 and 4, below.*
3. **[Optional]** Click into the checkbox labeled **At New Rate** underneath the **Tax Gratuity** or **Tax Service Charge** option.  
**Result:** *The column of fields below the **At New Rate** option is enabled.*  
**Note:** *Use this feature only if you wish to tax your service charge at a rate that is different from your current tax rate(s).*
4. **[Optional]** Click into the various rate fields below the **At New Rate** option to set the tax rate to be applied to the gratuity/service charge.  
**Note:** *This step is only necessary if you perform Step 3, above.*

## Making an Event Tax Exempt

1. Access the Event Tax Rates window as described above.
2. Click into the checkbox labeled **Exempt**, at the lower left of the Event Tax Rates window.  
**Result:** *The current event is now tax exempt.*
3. Click into the Exempt # field and enter an optional tax exempt ID number.

## Adding Whole Dollar Adjustments

1. Access the Event Tax Rates window as described above.
2. Click into one of the fields at the lower right of the form, under the heading "Additional Adjustments."
3. Enter a dollar amount to be added to the subtotal, tax, gratuity, or service charge of the event.  
**Note:** *As an alternative, you can click the down arrow in any field to use the drop-down calculator.*

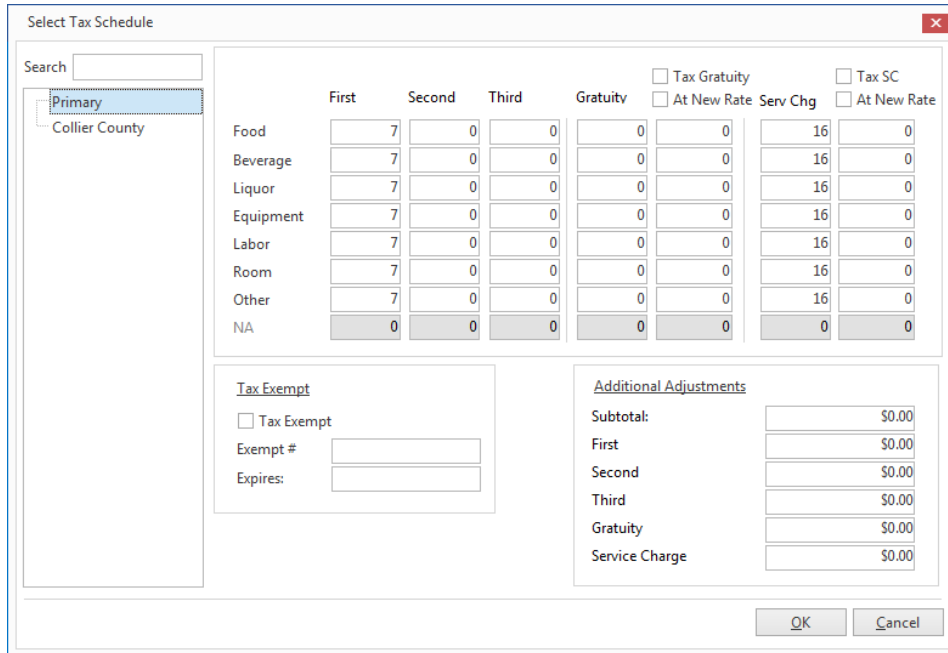
## Selecting an Optional Tax Schedule

1. Access the Event Tax Rates window as described above.

2. Click the **Select Tax Schedule** button .

**Result:** The Select Tax Schedule window opens.

**Note:** This feature allows you have multiple tax schedules in your program, and select from them on-the-fly.



Select Tax Schedule

Search

**Primary**

Collier County

	First	Second	Third	Gratuity	Tax Gratuity <input type="checkbox"/> At New Rate	Tax SC <input type="checkbox"/> At New Rate	Serv Chg
Food	7	0	0	0	0	16	0
Beverage	7	0	0	0	0	16	0
Liquor	7	0	0	0	0	16	0
Equipment	7	0	0	0	0	16	0
Labor	7	0	0	0	0	16	0
Room	7	0	0	0	0	16	0
Other	7	0	0	0	0	16	0
NA	0	0	0	0	0	0	0

**Tax Exempt**

☐ Tax Exempt

Exempt #

Expires:

**Additional Adjustments**

Subtotal:  \$0.00

First:  \$0.00

Second:  \$0.00

Third:  \$0.00

Gratuity:  \$0.00

Service Charge:  \$0.00

OK Cancel

3. Select a schedule from the list.

4. Click **OK**.

**Result:** The event's tax/service charge rates are updated to reflect your selection.

**Tip:** Use the incremental search tool to locate your tax schedules, if numerous schedules have been created. Simply begin typing the name of your tax schedule into the Search field, and you will be taken to your matching record.




## Unit 12: Managing Event Payments

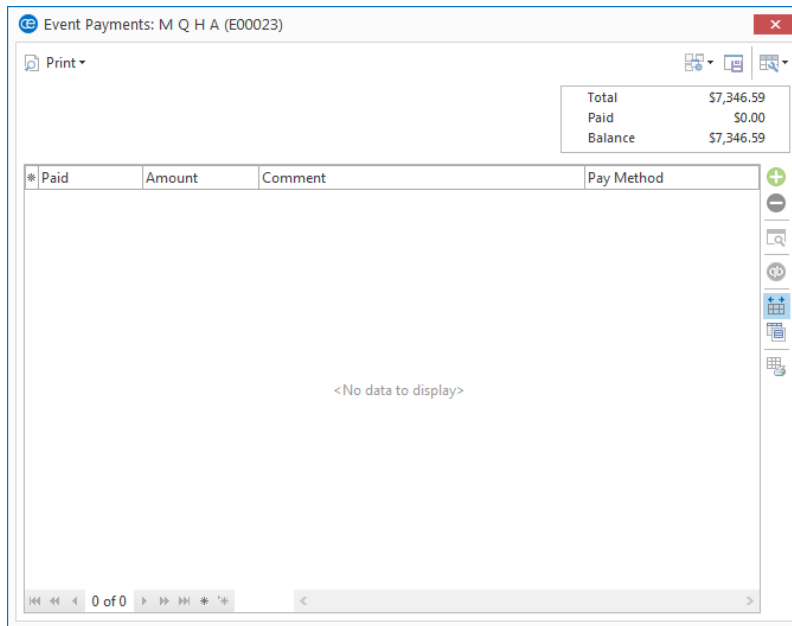
In this section, you will learn:


- Adding a Payment for an Event
- Editing an Existing Payment
- Showing Payment Details on Prints
- Generating the Payments Made Report



## Adding a Payment for an Event

1. In Event Manager, retrieve the event for which you want to add a payment.
2. Click the **Payments Made** button , located at the bottom of the Event Manager, or from the **Tools** menu at the top of your screen, depending on your personal configuration.  
**Result:** *The Event Payments window opens.*



3. Click the **Add Payment** button , located on the right-hand side of the Event Payments window.  
**Result:** *The Payment Details window opens.*  
**Note:** *The current date defaults as the new payment date, but can easily be edited.*

The screenshot shows a 'Payment Details' window with a 'Credit Card Information' tab. The 'General' section contains fields for Date (7/1/2016), Amount (\$2,000.00), Pay Method (Credit Card), Category (Initial Deposit), and Comment. The 'Miscellaneous' section contains fields for Rev Code, Acct Code, Check #, and Check Date. The window has OK and Cancel buttons at the bottom.

4. Enter a dollar amount into the Amount field.  
**Note:** Type a dollar amount or click the down arrow to access the drop-down calculator.
5. Select a Pay Method from the drop-down quickpick list, or accept the default. (You may also type directly into the field.)  
**Note:** This information will default from the Payment Method of the event (if one exists).
6. Optionally enter a Category or choose a category from the drop-down quickpick list.  
**Note:** Examples of categories might include "Initial Deposit," "Final Payment," etc.
7. Enter a Comment, if desired.
8. **[Optional]** Enter credit card details, if posting a credit card payment .
9. **[Optional]** Enter additional information, including a Revenue Code or Account Code for the payment, as well as Check # and Check Date.  
**Note:** None of this is required information.
10. Click **OK**.  
**Result:** The Payment Details window closes, and your new payment is listed in the Event Payments window.

Event Payments: M Q H A (E00023)

Print


Total	\$7,346.59
Paid	\$2,000.00
Balance	\$5,346.59

* Paid	Amount	Comment	Pay Method
7/1/2016	\$2,000.00	Initial Deposit	Credit Card

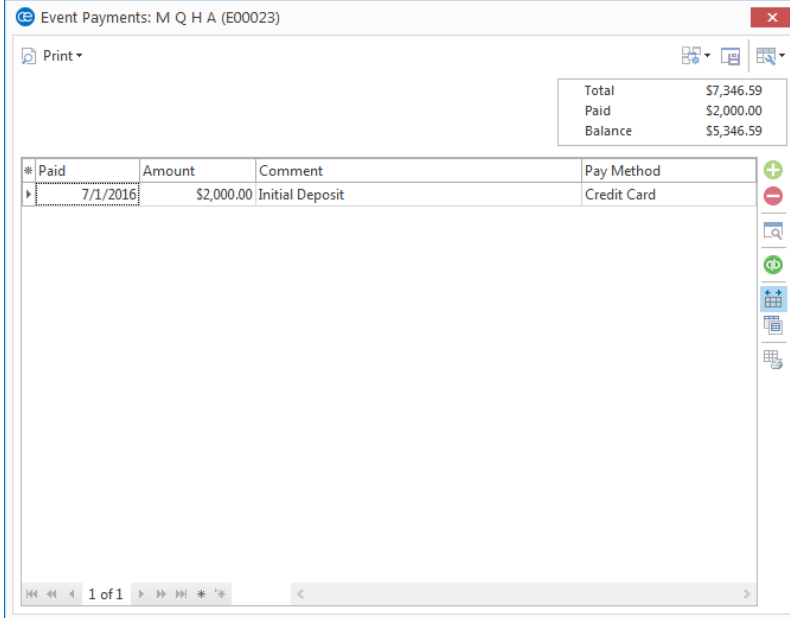
1 of 1

11. Click the , located at the upper right-hand side of the window, to close the Event Payments window.



## Editing an Existing Event Payment

1. Click the **Payments Made** button , located at the bottom of the Event Manager, or from the **Tools** button at the top of your screen, depending on your personal configuration.

**Result:** The Event Payments window opens.



Paid	Amount	Comment	Pay Method
7/1/2016	\$2,000.00	Initial Deposit	Credit Card

2. Select any payment listed in the Event Payments window.
3. Click the **View/Edit Payment Details** button , located on the right-hand side of the window.  
**Result:** The Payment Details window for that payment opens.
4. Edit information as desired and click **OK**.  
**Result:** You are returned to the Event Payments window.
5. Click the , located at the upper right-hand side of the window, to close the window.

## Showing Payment Information on an Event Print

You may want to include information on your print about payments you have already received. Payments represent money you have received (whereas deposits, discussed in the next unit, represent money that will be due at some point in the future).

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.
2. Click the **Print Designer** button.  
*Result: The Print Designer window opens.*
3. Click on a title, such as **Contract**, from the prints panel on the left-hand side of your Print Designer.
4. Click into the section heading labeled **Payments Made** and optionally type a new heading as desired.
5. Verify the **Suppress Payments** checkbox, located to the right of the **Payments Made** section, is not checked.
6. Click the down arrow to the right of the first field, and select a field to appear (or select **None**).
7. Repeat Step 6 for other fields in the section.  
*Result: With the checkbox unchecked, this section will appear on the print.*

Payments Made						
Payment	Date	Method	Expires	Approval	Card Holder	Card Number
\$500.00	8/21/2015	Credit Card	01-2019		John Smith	***** 2949

See the following table for a description of the available payment fields.

### Available Payment Fields

Field	Description
<b>Payment</b>	Prints the payment amount for the event.
<b>Pmt Date</b>	Prints the date of each payment made for the event.
<b>Pmt Method</b>	Prints the method of each payment.
<b>Pmt Card Type</b>	Prints the credit card type, if applicable, used for each payment.
<b>Pmt Card Number (Hidden)</b>	Prints the last four digits of the credit card, if applicable, used for each payment.
<b>Pmt Card Holder</b>	Prints the name of the credit card holder, if applicable, for each payment.
<b>Pmt Expires</b>	Prints the expiration date of the credit card.
<b>Pmt Approval</b>	Prints the authorization details from the credit card company, if applicable.
<b>Pmt Rev Code</b>	Prints an optional revenue code you may have entered for each payment (often used for in-house tracking).
<b>Pmt Acct Code</b>	Prints an optional account code you may have entered for each payment (often used for in-house tracking or for interfaces with third-party accounting packages).
<b>Pmt Check #</b>	Prints the check number, if the payment type is Check.
<b>Pmt Check Date</b>	Prints the date the check was written, if the payment type is Check.
<b>Pmt Category</b>	Prints the payment category, e.g., Scheduled Payment.
<b>None</b>	Choose this option if you do not want anything to appear in one of these fields on the print.

## Generating the Payments Made Report

1. Click the **Reports** ribbon tab at the top of the screen.
2. Click the **Financials** button in the **Event Information** group.
3. Choose **Payments Made**.

**Result:** The *Payments Made* window opens, where you can select your report parameters.

**Tip:** As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

The screenshot shows the 'Payments Made' window with the following parameters:

- Date Range:**
  - ☐ Less Than Or Equal To
  - ☐ Greater Than Or Equal To
  - ☐ Within Date Range
  - ☒ Relative Date Range
- Date Range Values:** 6/1/2015 thru 6/30/2015
- Title:** Payments Made
- Base Results On:**
  - ☒ Payment Date
  - ☐ Event Date (OR Group Booking Departure Date)
  - ☐ Either Payment Date OR Event Date (OR Group Booking Departure Date)
- Options:**
  - Group By:** Payment Date
  - ☐ Include Details
  - ☐ Include Group Booking Payments
- Close After Printing:** ☐
- Buttons:** OK, Cancel

4. Set a **Date Range** for your report by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, **Within Date Range**, or choose a **Relative Date Range** for the report.
5. **[Optional]** Change the title of the report by highlighting the words "Payments Made" and typing directly into the field.
6. **[Optional]** Choose to base results on either **Payment Date**, **Event Date OR Group Booking Departure Date**, or choose **Either Payment Date OR Event Date OR Group Booking Departure Date**.  
**Note:** This option is applicable if you own the Guestrooms Manager add-in module.
7. **[Optional]** Click the down arrow under **Group By** to group by a detail other than Payment Date.

8. **[Optional]** Choose to **Include Details** or **Group Booking Payments** by clicking into the corresponding checkbox.
9. When finished, click **OK**.  
**Result:** *The Payments Made Report is generated, incorporating the parameters you established.*



## Unit 13: Scheduling Future Deposits for a Party

In this section, you will learn:


- Scheduling Future Event Deposits
- Making Payments on a Deposit
- Adding Scheduled Event Deposits
- Creating Default Conditional Deposit Schedules
- Setting the Program to Update Deposits Due Automatically
- Showing Deposits Due on Event Prints
- Generating the Deposits Due Report

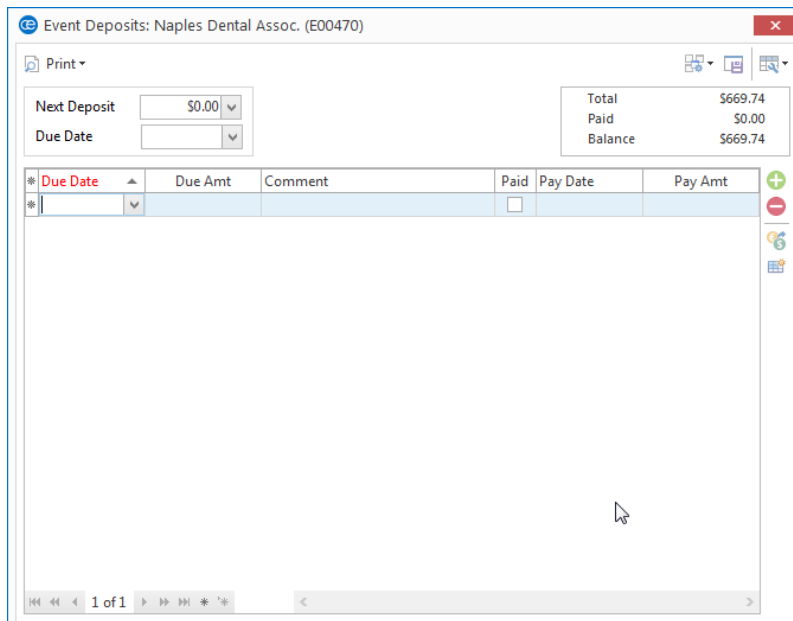


## Scheduling Future Event Deposits

In Caterease, there is a distinction between payments made for an event and deposits that are due in the future. Future deposits are discussed below, including the option to create a regular schedule of deposits automatically calculated based on the date a party is booked or held.


### Scheduling an Event Deposit

1. In the Event Manager, search for and select the event for which you want to schedule a deposit.
2. Click on the **Deposits Due** button , located at the bottom left-hand side of the Event Manager window, or from the **Tools** button in the **Home** ribbon tab, depending on your personal configuration.  
**Result:** The Event Deposits window opens.




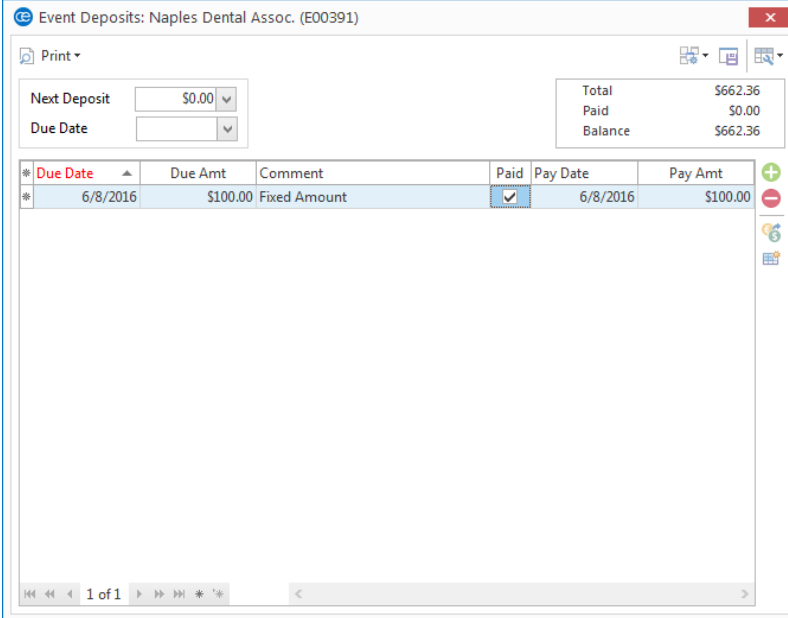
* Due Date	Due Amt	Comment	Paid	Pay Date	Pay Amt
			<input type="checkbox"/>		

Total \$669.74  
 Paid \$0.00  
 Balance \$669.74

3. Click the **Add Deposit** button , located at the right-hand side of the Event Deposits window.  
**Result:** A new, blank line is added to your deposits list.
4. Click the down arrow at the right of the Due Date field and select a due date for the new deposit using the drop-down calendar or optionally type a date by hand.
5. Press your **[Enter]** key.  
**Result:** Your cursor moves to the Due Amount field.
6. Enter an amount for the deposit, or click the down arrow to access the drop-down calculator.
7. Press **[Enter]** and enter a Comment, if desired.  
**Note:** Examples of comments might include "Initial Deposit," "Final Payment," etc.
8. Repeat Steps 3-7 to add other deposits as desired.

## Making Payments on a Deposit

1. Click on the **Deposits Due** button , located at the bottom left-hand side of the Event Manager window, or from the **Tools** button in the **Home** ribbon tab, depending on your personal configuration.  
**Result:** The Event Deposits window opens.



Event Deposits: Naples Dental Assoc. (E00391)


Print ▾


Next Deposit: \$0.00  
Due Date: ▾

Total	\$662.36
Paid	\$0.00
Balance	\$662.36


* Due Date	Due Amt	Comment	Paid	Pay Date	Pay Amt
* 6/8/2016	\$100.00	Fixed Amount	<input checked="" type="checkbox"/>	6/8/2016	\$100.00

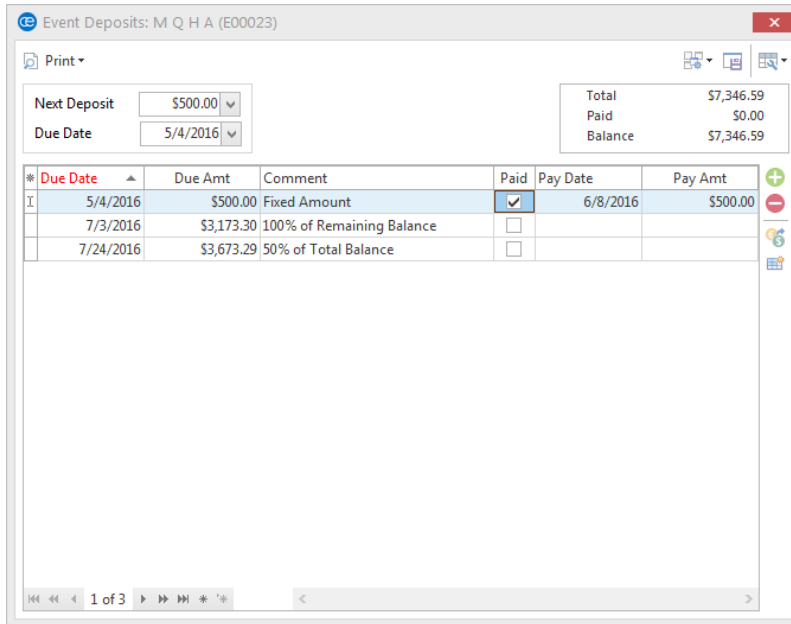
1 of 1

2. Select a deposit on the Event Deposits window.
3. Click into the checkbox in the Paid column.  
**Result:** The current date is automatically entered in the Paid Date column, and the due amount is entered as the Paid Amount.  
**Note:** These defaults can be overridden, if necessary.
4. Click **Add To Payments** button  to automatically add a payment to this event reflecting this deposit.  
**Result:** A confirmation message appears.  
**Note:** Since Caterease treats deposits due differently from payments made, it is highly recommended that you add any paid deposits to your event payments by following this step and the next two steps.
5. Click **Yes**.  
**Result:** A Payment Details window opens.  
**Note:** The payment date and amount will default from your Event Deposits information, while the payment method will default from the general event information (if you have entered a payment method and/or credit card information).
6. Enter or edit information as desired and click **OK**.  
**Result:** A new payment has been added to this event based on the paid deposit.

**Note:** If you wish to review payments made for this event, click the **Payments Made** button , also located in the toolbar at the bottom of your screen (or accessed via the **Tools** button in your **Home** ribbon tab, depending on your personal configuration).

## Adding Scheduled Event Deposits

1. In the Event Manager, search for and retrieve the event for which you want to schedule a deposit.
2. Click on the **Deposits Due** button , located at the bottom left-hand side of the Event Manager window, or from the **Tools** button in the **Home** ribbon tab, depending on your personal configuration.  
**Result:** The Event Deposits window opens.



Event Deposits: M Q H A (E00023)


Print

Next Deposit: \$500.00  
Due Date: 5/4/2016

Total	\$7,346.59
Paid	\$0.00
Balance	\$7,346.59

#	Due Date	Due Amt	Comment	Paid	Pay Date	Pay Amt
I	5/4/2016	\$500.00	Fixed Amount	<input checked="" type="checkbox"/>	6/8/2016	\$500.00
	7/3/2016	\$3,173.30	100% of Remaining Balance	<input type="checkbox"/>		
	7/24/2016	\$3,673.29	50% of Total Balance	<input type="checkbox"/>		

1 of 3

3. Click the **Make Scheduled Deposits** button , located on the right-hand side of the Event Deposits window.  
**Result:** A list of deposits is created, based on the conditional deposit schedules you have created in your program.  
**Note:** See above for information on making payments on these deposits.

## Creating Default Deposit Schedules

You can create automatic schedules of future deposits for your parties - complete with due amounts (in dollars or percentages of event totals) and due dates (relative to the event date or booked date), and then use these schedules for the various events that you book. Schedules can be conditional, so it applies only to a certain type of event - and you can even tell the program to automatically update the due amounts or due dates if details of the party change. Note: This feature is not available in the Express version of the program.

### Creating a Conditional Deposit Schedule

1. Click the **Administration** ribbon tab at the top of the CaterEase screen.
2. Click the **Options** button and choose **Deposit Schedule**.  
**Result:** The Default Deposit Schedule window opens.

Default Deposit Schedule

Conditional Group

Condition

- Theme = Meeting
- Theme = Wedding Reception
- All Events

Summary Of Deposits

#	#	Deposit	When	From What
1	1	\$250.00	1 Day(s)	After The Booked Date
2	2	100%	1 Week(s)	Before The Event Date

1 of 2

Deposit Details

Set the deposit date for 1 Day(s)

After the Booked Date

and make the deposit An Amount of...


50 (%) of the Total balance due

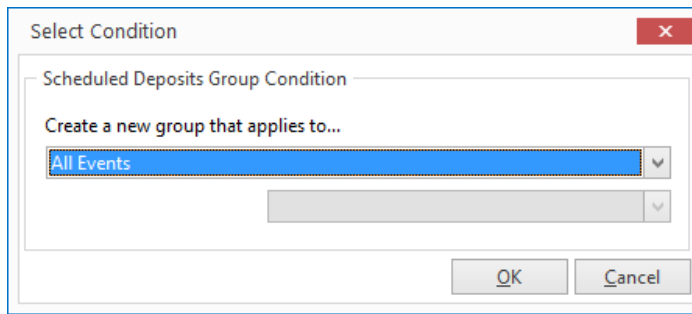
\$250.00

Note:  
Arrange scheduled deposits chronologically

OK Cancel

**Tip:** The program evaluates these conditions in the order they are listed - and stops when it reaches a condition that is true. For example, if your first condition for events says "Category = Business" and your second condition says "Status = Definite," when the program finds an event with a category of "Business" it will apply those required fields and stop - never evaluating for the second condition. For this reason, it is imperative that any condition that says "All" records ("Events," "Accounts," etc.), must be the LAST condition listed.

3. Click the **Add Group** button , located at the top left-hand side of the **Conditional Group** pane.  
**Result:** The Select Condition window opens.



4. Select a condition from the **Create a new group that applies to...** drop-down list. Choose from the following:
  - **All Events**  
*Note: If All Events is selected, the second drop-down list will not display.*
  - **Events with a Status of** (or Category of; Theme of; Operation of; Business Type of; Sales Representative of)  
*Note: If any of these options is selected, the second drop-down list becomes available, along with its corresponding drop-down list.*
5. Click **OK**.  
*Result: The Select Condition window closes and the Default Deposit Schedule window remains open.*
6. In the **Deposit Details** area, choose whether this deposit will be due Before or After the Event Date or the date on which the event is booked (Booked Date), and how many days/week/months before/after the Event Date/Booked Date.
7. Determine whether the amount of the deposit should be calculated as a percentage of the event totals or as a whole dollar amount by choosing either **A Percent** or **An Amount** from the drop-down list.
  - If setting a percentage of the event totals, use the fields in the fourth row of the **Deposit Details** area to set the percentage amount (first field) and the total to use as the basis.  
*Note: You would probably use the "Remaining balance due" option for all subsequent deposits after the first one. For example, a possible first deposit might be "50% of the Total balance due," but subsequent deposits might be based on the balance that remains. In other words, "Total balance due" represents the total amount of sales for that event, regardless of whether any deposits have been received.*
  - If setting a whole dollar amount, use the field in the fifth row of the **Deposit Details** area to set that dollar amount - either by typing into the field or clicking the down arrow to access the drop-down calculator.

## Showing Deposits Due on Event Prints

In addition to general financial information about an event, you may want the schedule of future deposits due for a party to display on your print. This section will list all deposits that have not yet been paid, i.e., those deposits that are due at some point in the future.

1. Click the **Setup** sidebar group on the left-hand side of your Caterease screen.
2. Click the **Print Designer** button.  
***Result:** The Print Designer window opens.*
3. Click on a title, such as **Contract**, from the prints panel on the left-hand side of your Print Designer.
4. Verify the **Suppress Deposit Due Schedule** checkbox, located beneath the **Suppress Miscellaneous Charges/Discounts** checkbox, is not checked.  
***Note:** To identify a checkbox, float your mouse pointer over it prior to clicking.*
5. Click into the checkbox to add or remove a check mark.

***Result:** With the checkbox unchecked, this section will appear on the print.*

<u>Deposit Schedule</u>		
Due	Amount	Comment
12/24/2015	\$1,922.88	100% of Remaining Balance
1/14/2016	\$2,422.89	50% of Total Balance

# Generating the Deposits Due Report

This report lists all events with deposits due in a certain date range, as well as amounts and due dates of those deposits.

## Generating the Deposits Due Report

1. Click the **Reports** ribbon tab at the top of the screen.
2. Click the **Financials** button and choose **Deposits Due**.  
**Result:** The Deposits Due window opens, where you can select your report parameters.

**Tip:** As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

3. Set a date range for your report by choosing an option from the drop-down list to the right of the Forecast Numbers field.
4. **[Optional]** Change the title of the report by highlighting the words "Deposits Due" and typing directly into the field.
5. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.  
**Note:** Placing a check in a box causes the tool to exclude events with that status from your results.
6. **[Optional]** Click into the checkbox to the left of **Include Paid Deposits** to view events with paid deposits.
7. **[Optional]** Click into the checkbox to the left of **Include Group Booking Deposits** to view events with group bookings.  
**Note:** This is applicable if you own the Guestrooms Manager add-in.
8. When finished, click **OK**.  
**Result:** The Deposits Due Report is generated, incorporating the parameters you established.

## Setting the Program to Update Deposits Due Automatically

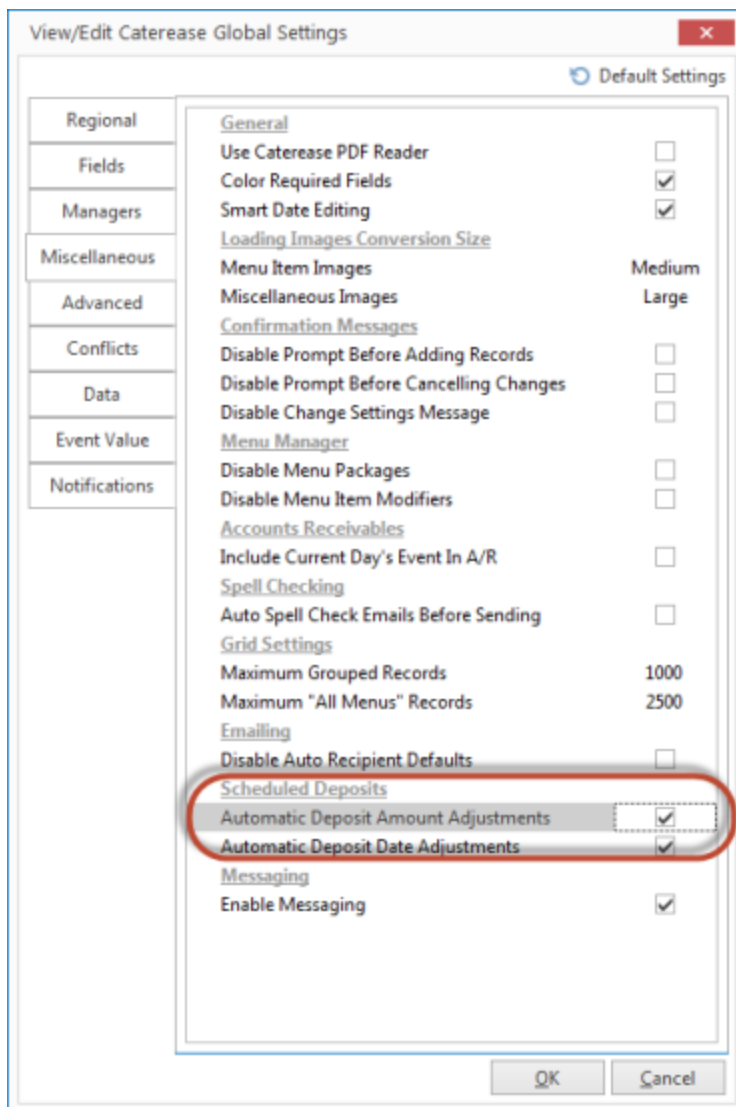
1. Click the **Administration** ribbon tab at the top of the Caterease screen.

2. Click the **Settings** button and choose **Global Settings**.

**Result:** The View/Edit Caterease Global Settings window opens.

**Note:** All Managers and other windows must be closed to access this tool. You will receive an informational prompt to this effect. Click **Yes** to close the operation.

3. Click the **Miscellaneous** tab, located on the left-hand side of the window.



4. Click into the checkbox next to **Automatic Deposit Amount Adjustments**.

**Note:** This setting causes the program to automatically recalculate percentage deposits ("50% of the event total," etc.), if the event totals change. Fixed dollar amount deposits and deposits that have already been paid will not be affected.

5. Click into the checkbox next to **Automatic Deposit Date Adjustments**.

**Note:** *This setting causes the program to automatically alter the due date of future deposits ("10 days before the event date," etc.), if the relative event date changes. Deposits that have already been paid will not be affected.*

6. Click **OK** to close the window.



## Unit 14: Attaching an External File to an Event

In this section, you will learn:


- Attaching a Related File to an Event
- Replacing an Existing Related File
- Attaching a Caterease Print to an Event



## Relating Files to an Event

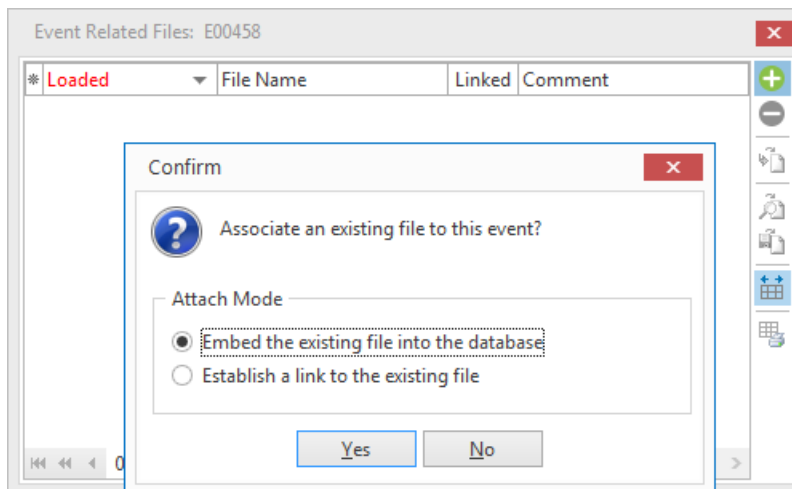
If you have any computer files, such as Word docs, Excel spreadsheets, PDF files, images, etc., that are somehow related to an event, you can associate those files to the party in Event Manager. For example, perhaps you want to maintain a copy of each updated contract on record, in order to compare changes over time. Or maybe you want to create a diagram of the party in an image software program, and then attach that image as a JPG or BMP file. You can choose to embed a copy of each file into the Caterease database or, if you plan to make future changes to the file, you can establish a link to the file itself. You can even attach PDF copies of Caterease prints (Contracts, Invoices, letters, etc.), with a single mouse click, in the print preview window.


### Adding a Related File to an Event

1. Click the **Related Files** button , located at the bottom left-hand side of the Event Manager window, or from the **Tools** button in the **Home** ribbon tab, depending on your personal configuration.

**Result:** The Event Related Files window opens.

**Tip:** Open a file from the Event Related Files window by double-clicking its name or by selecting it and clicking the **Open File** button.



2. Click the **Add File** button , located on the right-hand side of the Event Related Files window.  
**Result:** A confirmation message appears.
3. Choose to "Embed the existing file into the database" or "Establish a link to the existing file."  
**Note:** Embedding the file into the database copies the file in its current form and attaches it to this event; establishing a link to a file will connect this event to a file on your computer or network that you may change over time. (When establishing a link to a file that is not saved on your computer, you will only be able to review that file when your computer has access to it.)
4. Click **Yes**.  
**Result:** A browse window opens.
5. Browse your way to the file you want to attach to this event, and select it.  
**Note:** You may want to click the down arrow next to the file type field at the bottom right of the browse window and select a different type of file.

6. Click **Open**.


**Result:** *The selected file is attached to this event, and is listed in the Event Related Files window.*

**Note:** *As an alternative, you could double-click the file name in Step 5, above.*

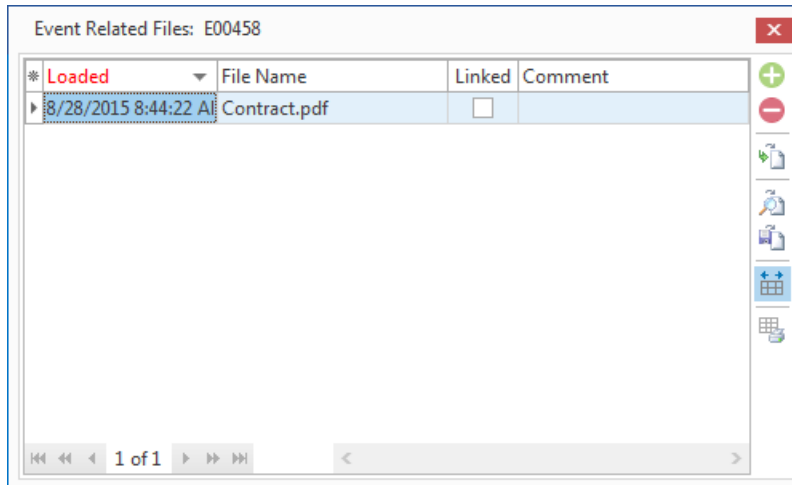
7. **[Optional]** Enter a **Comment** to describe the file or its relationship to the event.



8. Click the , located at the upper right-hand corner of the window, to close the window.

## Replacing an Existing Related File

1. Click the **Related Files** button , located at the bottom left-hand side of the Event Manager window, or from the **Tools** button in the **Home** ribbon tab, depending on your personal configuration.

**Result:** The *Event Related Files* window opens.



2. Click on the name of the related file you want to replace.
3. Click the **Replace File** button  on the right-hand side of the window.  
**Result:** A browse window opens.
4. Browse your way to the replacement file and select it.  
**Note:** You may want to click the down arrow next to the file type field at the bottom right of the browse window and select a different type of file.
5. Click **Open**.  
**Result:** The selected file is attached to this event, replacing the file highlighted in the *Event Related Files* window.  
**Note:** As an alternative, you could double-click the file name in Step 4, above.
6. **[Optional]** Update the **Comment** to describe the file or its relationship to the event.
7. Click the , located at the upper right-hand corner of the window, to close the window.

## Attaching a Caterease Print to an Event

1. Click the **Prints** button in the **Home** ribbon tab at the top of your Caterease screen, and select the print you want to attach to this event.

**Result:** A print preview window opens.

2. Click the **Attach** button at the top of the print preview window.

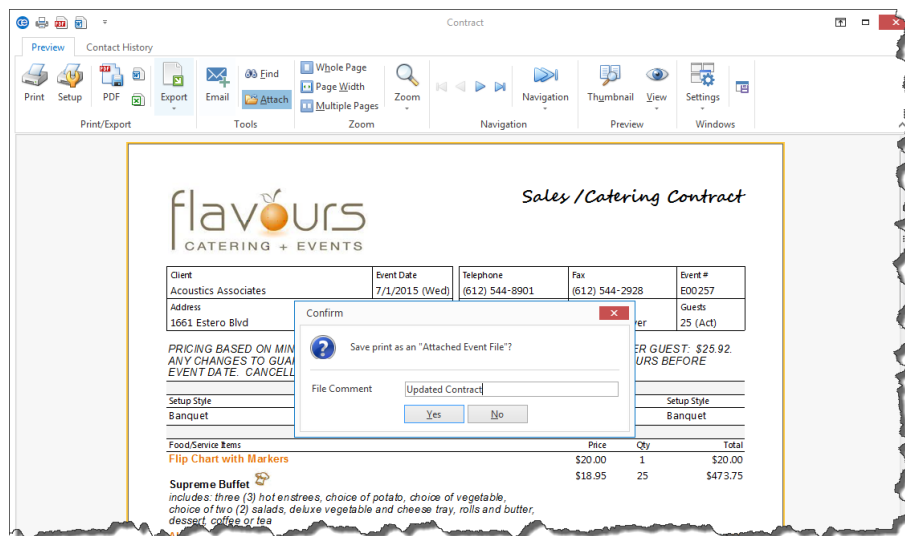
**Result:** A confirmation window opens.

3. **[Optional]** Enter a **Comment** to describe the document or its relationship to the event ("Original Contract," "Contract Update," "Invoice," etc.).

4. Click **Yes**.

**Result:** Another confirmation message appears.

5. Click **Yes** to close both the confirmation message and the print preview window, or click **No** to close only the confirmation message.



## Unit 15: Customizing the Tools Menu and Tools Bar

In this section, you will learn:

Customizing the Tools Menu  
Customizing the Toolbar

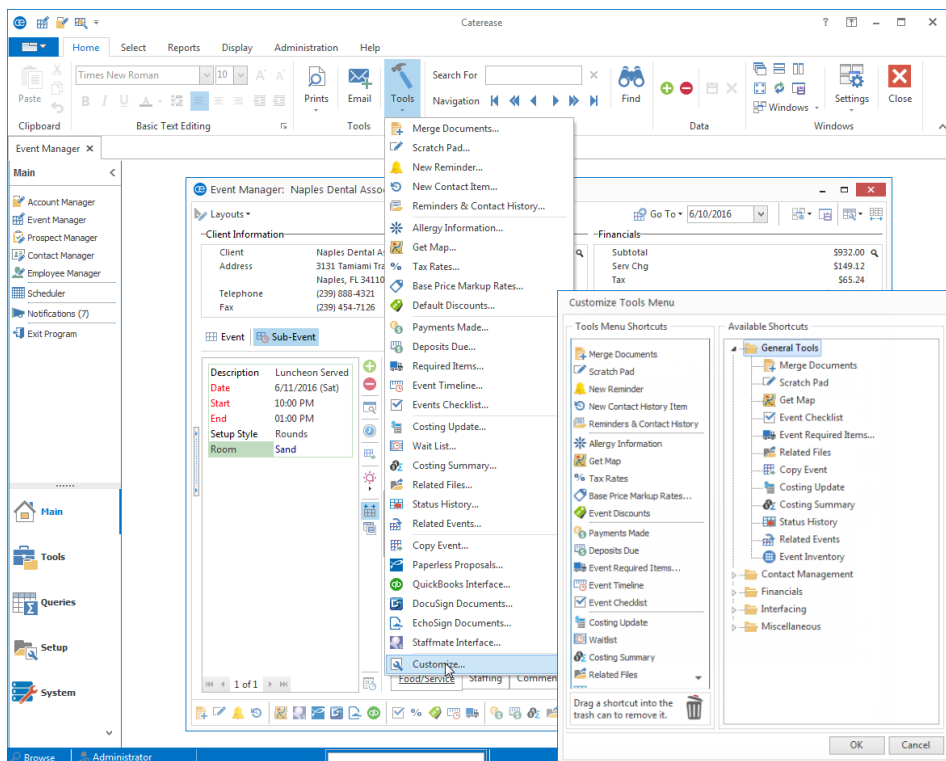


# Customizing the Tools Menu and Tools Bar

Every Manager has a unique and dynamic Tools Menu and Tools Bar. Any tools that you use all the time can be made easily and instantly accessible through the Tools Bar, while tools that you use “every so often” can be available in the Tools Menu drop-down list.

## Customizing the Tools Menu

1. Open the desired Manager you would like to customize.
2. Click the **Tools** menu, located at the top of your screen, in the **Home** ribbon tab.  
**Result:** A drop-down list of options display. Remember, each Manager will have its own list of tools.
3. Choose **Customize**, located at the bottom of any **Tools** menu.



**Note:** Make sure the correct window (Managers, Queries, etc.) is open before you customize and save your changes.

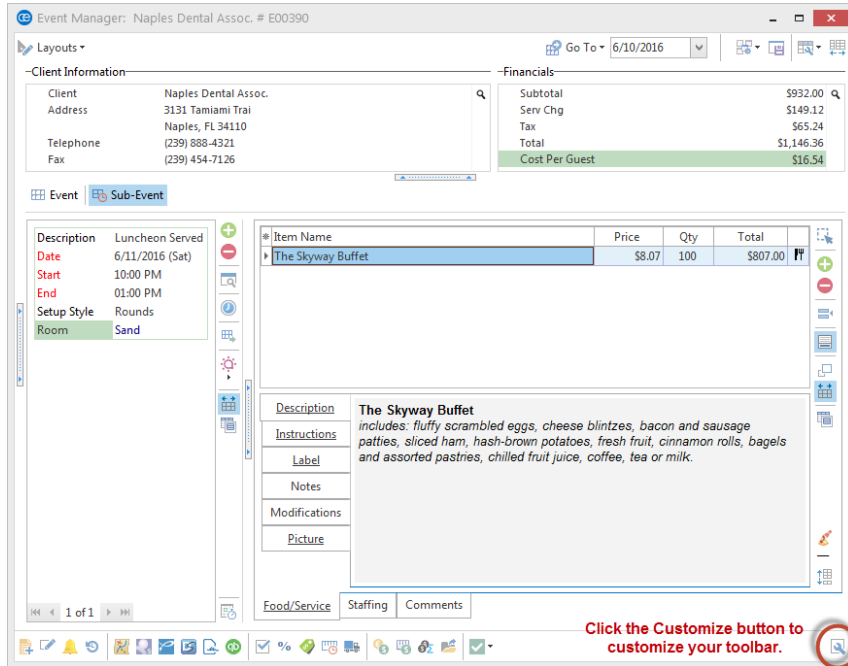
4. To remove a shortcut or shortcuts from the Tools Menu Shortcuts pane (left-hand side), simply click on a shortcut from the Tools Menu Shortcut pane (left-hand side), hold, and drag to the trashcan icon at the bottom of the window.
5. To add a shortcut, click on a shortcut from the Available Shortcuts pane (right-hand side), and drag and drop into the Tools Menu Shortcuts pane.  
**Note:** Click the expand button to the left of individual folders to reveal all available options.
6. To reposition buttons, drag and drop them up and down as desired in the list of Tools Menu Shortcuts.

7. When finished, click **OK**.
8. Click the **Save Current Window Settings** button  to save your customizations. Click the **Settings** button > **Shared** > **Current Window** to save your customizations for every user in your company.

# Customizing the Toolbar

1. Open the desired Manager you would like to customize.
2. Click the **Customize** button, located at the bottom right-hand corner of your Manager screen.

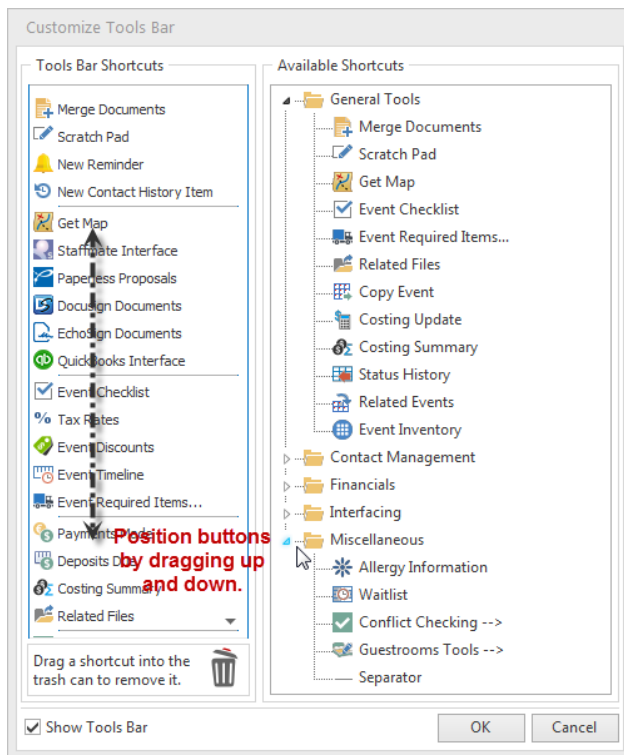
**Result:** *The Customize Tools Bar window opens.*




3. To remove a shortcut or shortcuts from the Tools Bar Shortcuts pane (left-hand side), simply click on a shortcut from the Tools Bar Shortcut pane (left-hand side), hold, and drag to the trashcan icon at the bottom of the window.
4. To add a shortcut, click on a shortcut from the Available Shortcuts pane (right-hand side), and drag and drop into the Tools Bar Shortcuts pane.

**Note:** Click the expand button to the left of individual folders to reveal all available options.

5. To reposition buttons, drag and drop them up and down as desired in the list of Tools Bar Shortcuts.



6. When finished, click **OK**.

7. Click the **Save Current Window Settings** button  to save your customizations. Click the **Settings** button > **Shared** > **Current Window** to save your customizations for every user in your company.

**Tip:** To remove the toolbar from your screen altogether, click into the **Show Tools Bar** checkbox to remove the check.

## Unit 16: Managing Accounts (Customers)

In this section, you will learn:

- Searching for Accounts
- Adding an Account in Account Manager
- Adding or Editing Contact People
- Adding a Customer Who Is Not a Company
- Adding and Retrieving Events from Account Manager
- Assigning a Default Payment Method to an Account
- Assigning a Default Site Location to an Account
- Combining Duplicate Accounts
- Printing a Consolidated Billing Statement

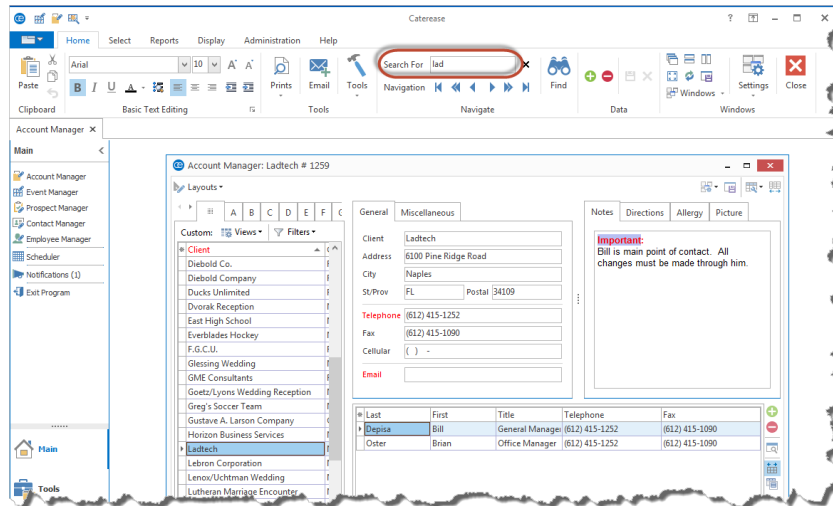


# Searching for Accounts

You can find existing customers based on virtually any detail. A special tool lets you incrementally search as you type the client's name, while the Account Finder tool lets you use basically any detail or combination of details to locate the customer you need.

## Searching Incrementally by Company Name

1. In Account Manager, click into the Search For field, located in the **Home** ribbon tab at the top of your Caterase screen.



2. Begin typing the name of the customer you want to find.  
**Result:** You are scrolled to a match as you type.  
**Note:** You will be searching based on client name, since that is how accounts are sorted (by default). See the topic below for details on how to sort and search by other details.

## Using the Account Finder

1. Click the **Find** button (binoculars), located on the **Home** ribbon tab at the top of your Caterease screen.

**Result:** *The Account Finder tool opens.*

2. In the **Search By Fields** area, type the text you would like to search for.


**Note:** *You may search by more than one field. Many fields, such as Category, Reference, Description, etc., have a corresponding drop-down lists to the right of the field.*

3. In the Search Rules field, select the appropriate rule.

**Note:** *Confirm that **Ignore Case** is selected if you want to ignore capitalization when you enter your text.*

- **Starts With** - The field you chose in the **Search By Fields** area starts with the words or letter you typed.
  - **Exact Match** - The field you chose in the **Search By Fields** area contains exactly the words you typed (and nothing else).
  - **Anywhere in Field** - The words or letters you typed appear anywhere in the field you chose in the **Search By Fields** area.
  - **Sounds Like** - The words or letters you typed match phonetically to the words in the field you chose in the **Search By Fields** area.
4. **[Optional]** Click the radio button next to **And** or **Or**, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.
  5. **[Optional]** Click into the **Include Prefixes** checkbox and then type the prefix (a, an, the) into the fields within the **Search Prefixes** section to include prefixes in your search.

6. Click the **Find Records** button, located at the bottom of the window.

7. **[Optional]** Click the **Show Results/Hide Results** button  at the top right of the Finder to display a list of all records your search has found thus far.  
**Note:** Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Finder tool down.
8. **[Optional]** If you accidentally skip over the record you want, click the arrows on either side of the **Find Records** button to move forward or backward.
9. Once your record is located, click **Close**.  
**Result:** The Account Finder window closes and you are positioned on the record you sought.  
**Note:** Click the **Clear Criteria** button after you have run a search, to clear all results and begin again.

## Creating and Using Custom Account Filter Tabs

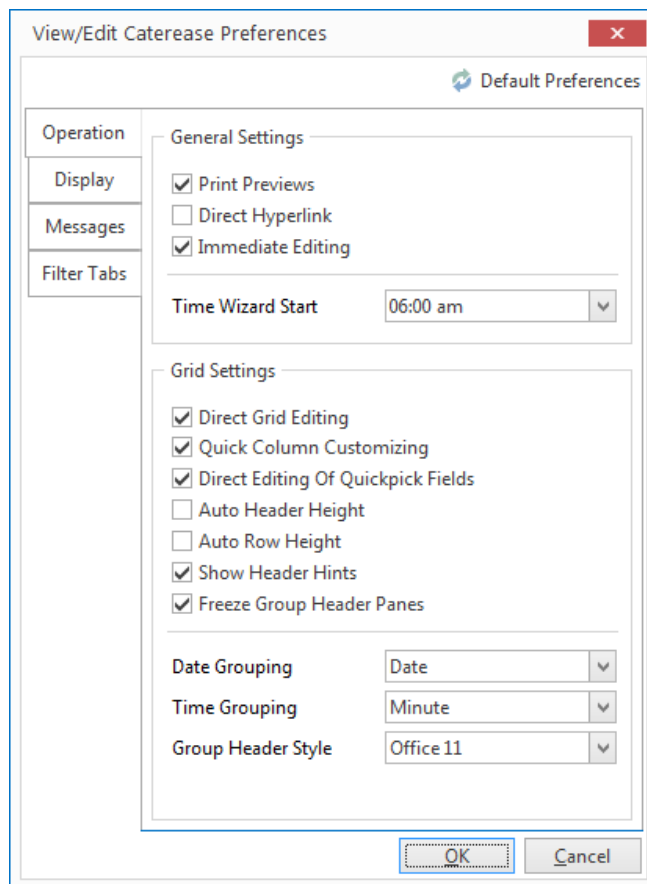
There are several quick, easy ways to locate a client in Caterease. One of the easiest ways is to use the handy Rolodex-style filter tabs that separate clients alphabetically based on names. To make this feature even more handy, you can create your own custom tabs to organize clients any way you want.

### Creating Custom Filter Tabs

1. Right-click on your Caterease main screen and choose **User Preferences**.

**Result:** The View/Edit Caterease Preferences window opens.


**Note:** This window can also be accessed from the **Administration** ribbon tab > **Settings** > **User Preferences**.




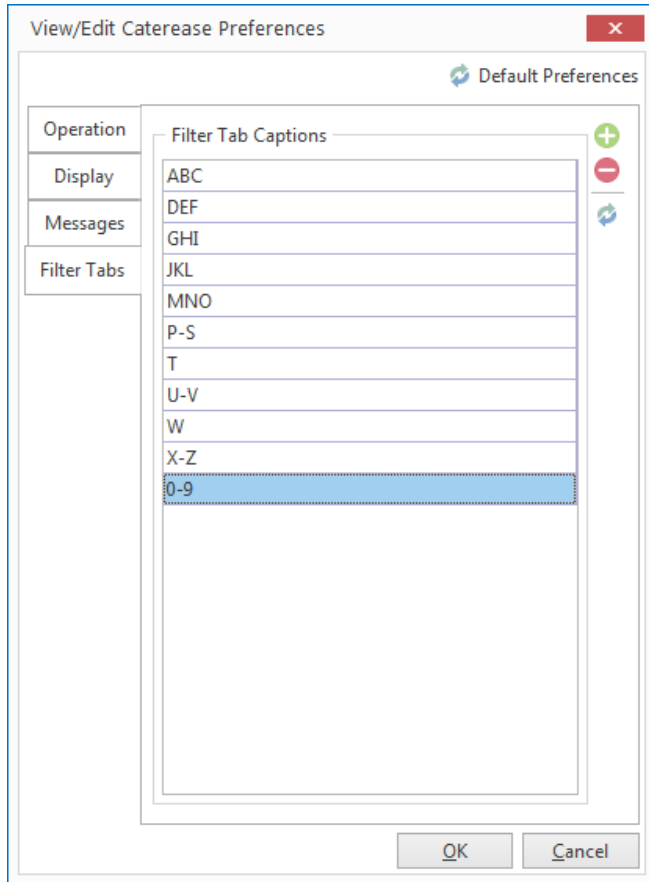
2. Click on the **Filter Tabs** tab, located on the left-hand side of the window.

3. Create a new filter tab in one of two ways:

- Simply click into the text field you want to change, then type in a new tab heading.

- Click the **Add Tab** button , located on the right-hand side of the window.  
**Result:** A new tab is created at the bottom of the list. Edit the tab as desired.

4. You can click, hold, and drag the tabs up and down the list, changing their positions.
  5. To delete a tab, click on the tab you want to edit, then click the **Delete Tab** button , located on the upper right-hand side of the window.
  6. When finished, click **OK**.
- Result:** The new tab layout will be applied throughout your various Managers.

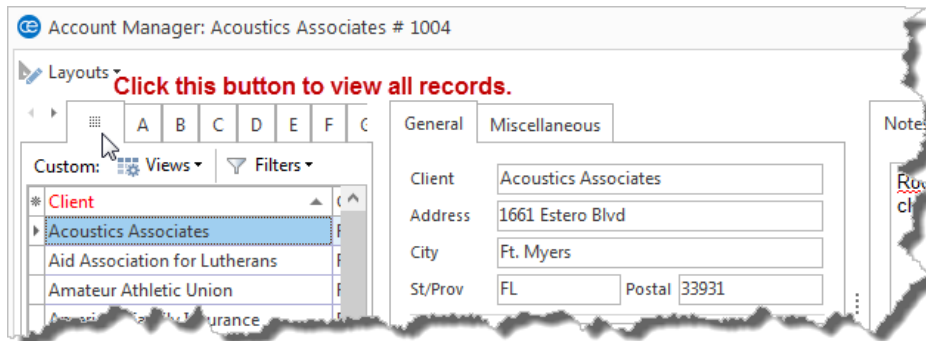


**Tip:** Any letter or number can be entered as a Tab Caption. A dash (-) is also permitted. Tab Caption conventions are listed below.

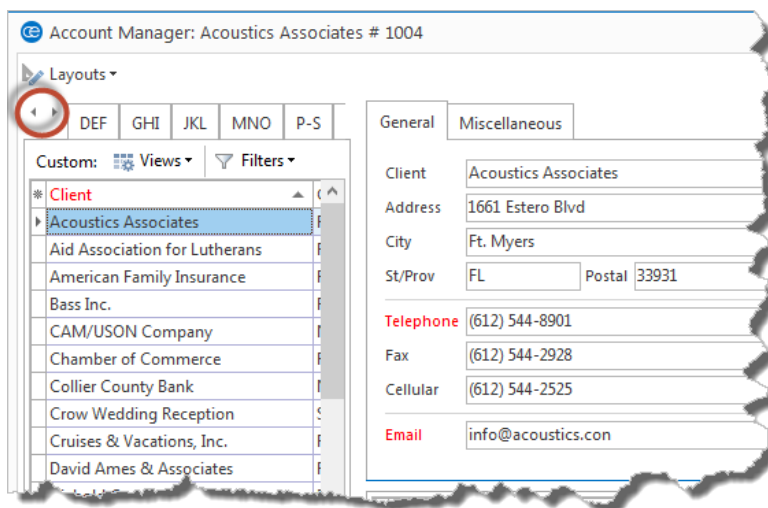
Tab Caption	Filter
<b>A</b>	All records starting with the letter A
<b>ABC</b>	All records starting either with the letter A, B, or C
<b>A-C</b>	All records starting with the letter A and ending with the letter C
<b>ABP-S</b>	All records starting with the letter A or B or P through S

## Using Custom Filter Tabs

1. Click the **Account Manager** button from your **Main** sidebar.  
**Result:** *Account Manager opens.*
2. Click on the filter tabs, located on the upper left-hand side of your screen. The first tab is for "All Records." Remaining tabs contain only records that begin with the tab's letter.



3. Customize your filter tabs by following the steps listed in the topic above.
4. Click the arrows to scroll through your tabs.



**Tip:** Filter Tabs are available in Account Manager, Prospect Manager, Contact Manager, Employee Manager, and the Event Wizard.

# Adding an Account in Account Manager

A new customer can be added in several different places: in Event Manager or the Event Wizard, while adding a new event for that customer; in Prospect Manager, if you want the new customer to be included as a "prospective lead" rather than an active client; or in Account Manager, if you simply want to have the new customer's information on record. This topic discusses the latter approach.

## Adding a New Account

1. Click the **Account Manager** button from the **Main** sidebar to access Account Manager.

**Result:** Your Account Manager opens, with the **General** tab selected as a default.

2. Click the **Add Record** button , located in the **Home** ribbon tab at the top of your screen.

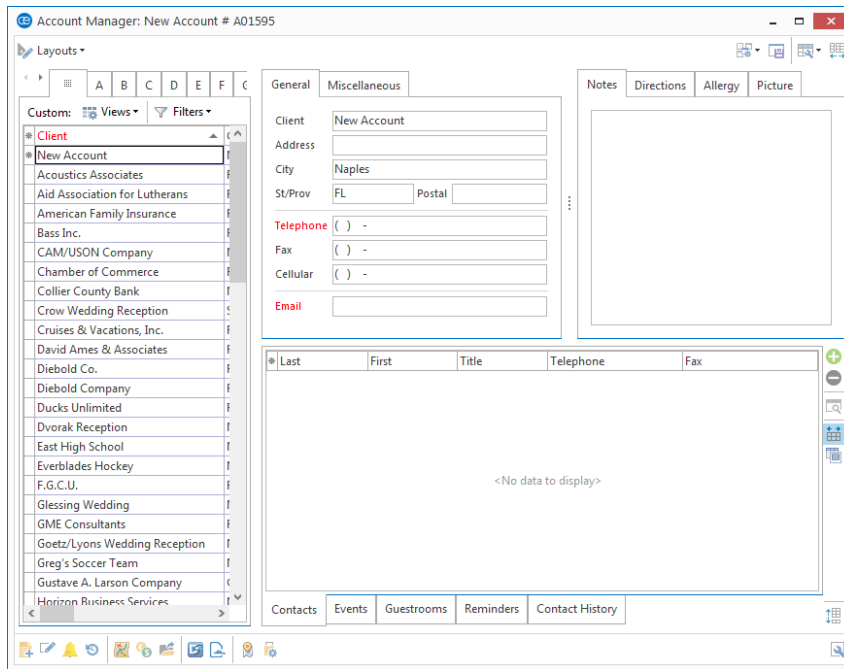
**Result:** A confirmation message appears.

3. Click **Yes** to confirm your choice.

**Result:** A new account is added, with the default name of "New Account."

**Note:** If your new client is an individual (as opposed to a company), see "Adding an Account Who Is Not a Company," below.

**Tip:** Account Notes, Directions, and Allergy text can be set to default for each new event booked for this client. Additionally, this text can be formatted here or in an event, using the Basic Text Editing tools.



Account Manager: New Account # A01595

Layouts ▾

Custom: Views ▾ Filters ▾

Client: New Account

Address:

City: Naples

St/Prov: FL Postal:

Telephone: ( ) -

Fax: ( ) -

Cellular: ( ) -

Email:

Notes Directions Allergy Picture

Last	First	Title	Telephone	Fax
<No data to display>				

Contacts Events Guestrooms Reminders Contact History

4. Type the name of your new account into the Client field, and press your **[Enter]** or **[Tab]** key to move to the next field.

**Result:** The name you typed into the Client field replaces the default name "New Account."

**Note:** You can add, remove, or rearrange fields on this and other areas of the screen.

5. Continue to fill out the fields on the **General** tab as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.
6. **[Optional]** On the **Miscellaneous** tab, type into a field or click the down arrow to the right of each field to select from the corresponding quickpick list.  
***Note:** These fields are used for tracking your customers, and are entirely optional. Also available on this tab is the option to make an account tax exempt by clicking into the **Tax Exempt** checkbox.*
7. **[Optional]** Click on the **Notes** tab in the top right window of Account Manager (if it is not already selected) and type any account-related notes as desired into the text box.
8. **[Optional]** Click on the **Directions** tab and type into the text box as desired if you wish to include directions to this account's facility.
9. **[Optional]** Click on the **Allergy** tab and type, into the text box, details of any allergies the client has disclosed.
10. **[Optional]** Click on the **Picture** tab, then right-click within the text block and choose **Load From File** if you want to include a digital image to associate with this account.

## Fields Available in Account Manager

Field	Description
<b>Client/Organization*</b>	Identifies the name of the customer.
<b>Address*</b>	Identifies the customer's address.
<b>Address (Other)</b>	Offers an optional address field; available as a sub-field of the Address field.
<b>City*</b>	Identifies the city where the customer resides.
<b>St/Prov*</b>	Identifies the state or province where the customer resides.
<b>Postal*</b>	Identifies the postal code or ZIP code for the customer.
<b>Telephone*</b>	Identifies the customer's telephone number; will be formatted as per your program's Global Settings.
<b>Telephone (Other)</b>	Offers an optional additional phone number field; will be formatted as per your program's Global Settings; available as a sub-field of Telephone.
<b>Fax*</b>	Identifies the fax number of the client; will be formatted as per your program's Global Settings.
<b>Cellular*</b>	Identifies a cellular phone number for the client; will be formatted as per your program's Global Settings.
<b>Country</b>	Identifies the country where the customer resides.
<b>Email*</b>	Identifies the customer's e-mail address.
<b>Website</b>	Identifies the website address of the customer.
<b>County</b>	Identifies the county where the customer resides.
<b>Category**</b>	Allows you to separate customers by category, for tracking purposes; examples might include "Corporate," "Government," "Educational," etc.
<b>Reference**</b>	Allows you to accurately track your marketing strategies by identifying how the customer heard of you originally (as opposed to why they might book individual events with you in the future).
<b>Description**</b>	Allows you to further distinguish between customers, for tracking purposes; e.g., you might have customers with a Category (see above) of "Corporate" AND a Description of "Association Member."
<b>Sales Rep**</b>	Identifies a sales representative linked to the customer.
<b>Tax Exempt**</b>	Allows you to designate every future event for this customer as tax-exempt.
<b>Exempt #**</b>	Identifies a Tax Exempt ID number for a tax-exempt customer; available as a sub-field of the Tax Exempt field.
<b>Expires**</b>	Allows you to enter an expiration date for the client's tax exempt number.
<b>Account ID</b>	Allows you to enter a custom ID number for the customer.
<b>Account #</b>	Offers a unique identifier for the customer; automatically assigned by the program.
<b>Group</b>	Offers a custom quickpick list so multiple clients can be associated with a single group; e.g., different branches of a company or bank might be grouped by that company or bank's name.
<b>Hold</b>	Displays a checkbox to place a client on hold (meaning that the client cannot book new events).
<b>Hold Type</b>	Offers a custom quickpick list of reasons the client was placed on "hold" (e.g., "Past Due Balance," "Seasonal," etc.).
<b>Hold Date</b>	Automatically notes the date and time a client was placed on "hold."
<b>Base Price Markup</b>	Allows you to select a default "base price markup" schedule for the client, so that prices for any event booked by the client will be adjusted by a certain percentage automatically.
<b>Contact Time Preference</b>	Identifies the preferred time to be contacted: Morning, Afternoon, Evening.
<b>Contact Type Preference</b>	Identifies the preferred contact type: Phone, E-mail.
<b>Coordinator</b>	Allows you to enter a Coordinator for the account. The Coordinator is the person who is coordinating the event. This might be the sales rep, the booking or site contact, or someone totally different.
<b>Site Name/Address</b>	Identifies the site name and address for off-premise events.
<b>Tax Schedule</b>	Allows you to select a default tax schedule for the client, so that any event booked by the client will default to those specific rates.
<b>Pay Method</b>	Allows you to establish a default payment method for all future events booked by the client.
<b>Loyalty Num</b>	Allows you to enter a custom number to track customer loyalty; this number will default to each contact person for the client (but can be changed) and will default for


## Unit 16: Managing Accounts (Customers)

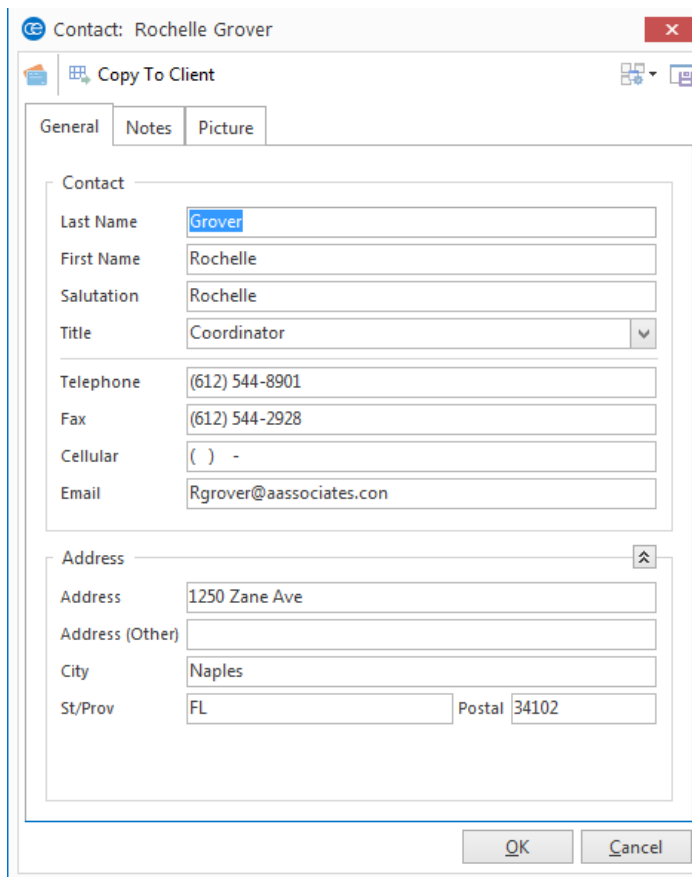
Field	Description
	each event the client or contact books.
<b>Master Account</b>	Displays the master account this client belongs to, if you have setup a master account relationship.
<b>Master Account #</b>	Allows you to enter a custom number to track a particular customer account number.
<b>User Defined Fields</b>	Allows you to create any unique fields you want, to suit your company's needs.
* Displayed on the <b>General</b> tab by default.	
** Displayed on the <b>Miscellaneous</b> tab by default.	

## Adding or Editing Contact People

Your customers might have multiple contact people, each with his or her own telephone number, address, etc. You can add as many contact people as you want by following the steps outlined below.

### Adding a New Contact Person

1. Click the **Contacts** tab at the bottom of Account Manager (if it is not already selected).  
**Result:** The list of contacts for the current account are displayed.
2. Click the **Add a New Contact** button , located on the right-hand side of your screen.  
**Result:** The Contact window opens, where you can enter contact person information.
3. Type the contact person's last name into the Last Name field.
4. Press your **[Enter]** or **[Tab]** key.  
**Result:** Your cursor moves to the next field, the First Name field.



Contact: Rochelle Grover

Copy To Client

General Notes Picture

Contact

Last Name: Grover

First Name: Rochelle

Salutation: Rochelle

Title: Coordinator

Telephone: (612) 544-8901

Fax: (612) 544-2928

Cellular: ( ) -

Email: Rgrover@aassociates.com

Address

Address: 1250 Zane Ave

Address (Other):


City: Naples

St/Prov: FL Postal: 34102



OK Cancel

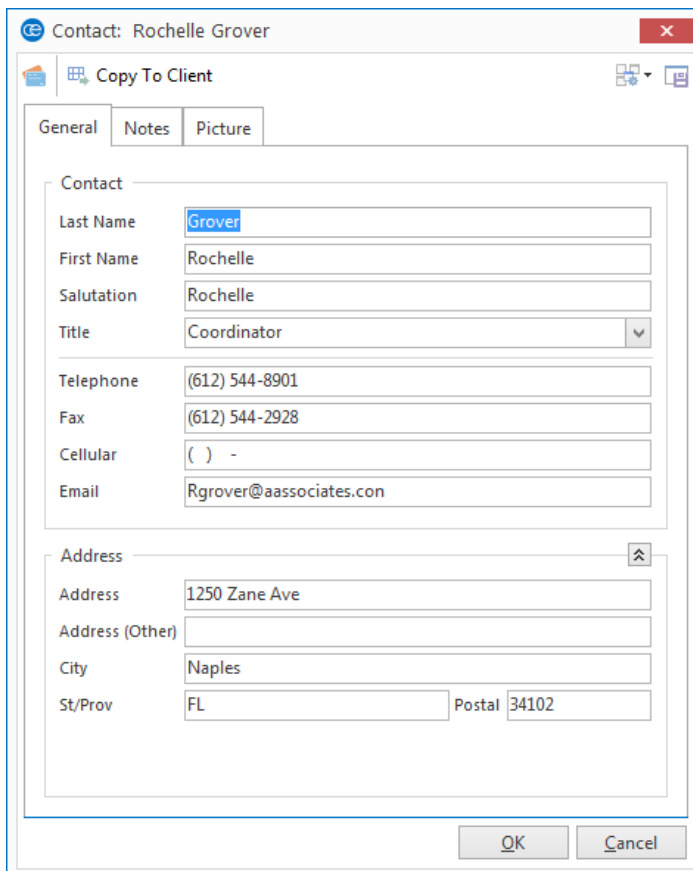
5. Continue to fill out information as desired, pressing **[Enter]** or **[Tab]** to move from field to field.  
**Note:** Drop-down quickpick lists are offered for fields such as Title, and you can quickly and easily customize them.
6. When finished, click **OK** to close the Contact window.

## Editing Contact Person Information

1. Click the **Contacts** tab at the bottom of Account Manager (if it is not already selected).  
**Result:** *The list of contacts for the current account is displayed.*
2. Click on one of the contact people listed on that tab to select it for editing.
3. Click the **Show Contact Details** button  , located at the right-hand side of your screen.  
**Result:** *The Contact window for the selected contact person opens.*
4. Click on any tab within the Contact window and edit any information as desired.  
**Note:** *Drop-down quickpick lists are offered for fields such as Title, and you can easily customize them.*
5. When finished, click **OK**.  
**Result:** *The Contact window closes and your changes are saved.*

## Adding an Account Who is Not a Company

1. Click the **Account Manager** button from the **Main** sidebar to access Account Manager.  
**Result:** Your Account Manager opens, with the **General** tab selected as a default.
2. Click the **Add Record** button , located in the **Home** ribbon tab at the top of your screen.  
**Result:** A confirmation message appears.
3. Click **Yes** to confirm your choice.  
**Result:** A new account is added, with the default name of "New Account."  
**Note:** Do not fill out any General account details; instead, proceed to the next step, Step 4.
4. Click the **Add A New Contact** button , located on the right-hand side of the **Contacts** tab on the Account Manager window.  
**Note:** This button is identical to the **Add Record** button you clicked in Step 2, above. Be careful not to confuse them.  
**Result:** The Contact window opens, where you can enter your contact person information.



Contact: Rochelle Grover

Copy To Client

General Notes Picture

Contact

Last Name: Grover

First Name: Rochelle

Salutation: Rochelle

Title: Coordinator

Telephone: (612) 544-8901

Fax: (612) 544-2928

Cellular: ( ) -

Email: Rgrover@aassociates.com

Address

Address: 1250 Zane Ave

Address (Other):

City: Naples

St/Prov: FL Postal: 34102

OK Cancel

5. Type the customer's last name into the Last Name field.
6. Press your **[Enter]** or **[Tab]** key.  
**Result:** Your cursor moves to the next field, the First Name field.

7. Continue to fill out customer information as desired, pressing **[Enter]** or **[Tab]** to move from field to field.

**Note:** Drop-down quickpick lists are offered for fields such as Title, and you can easily customize them. The Salutation for the client (how you would address him/her in a letter) can be [set to default](#) from the first name.

8. Click the **Copy To Client** button, located on the top left-hand side of the Contact window.

**Result:** All name and address information from the contact person is copied into the respective fields for the client.

**Note:** If any client information already exists, you will be prompted to confirm you want it overwritten.

# Adding and Retrieving Events from Account Manager

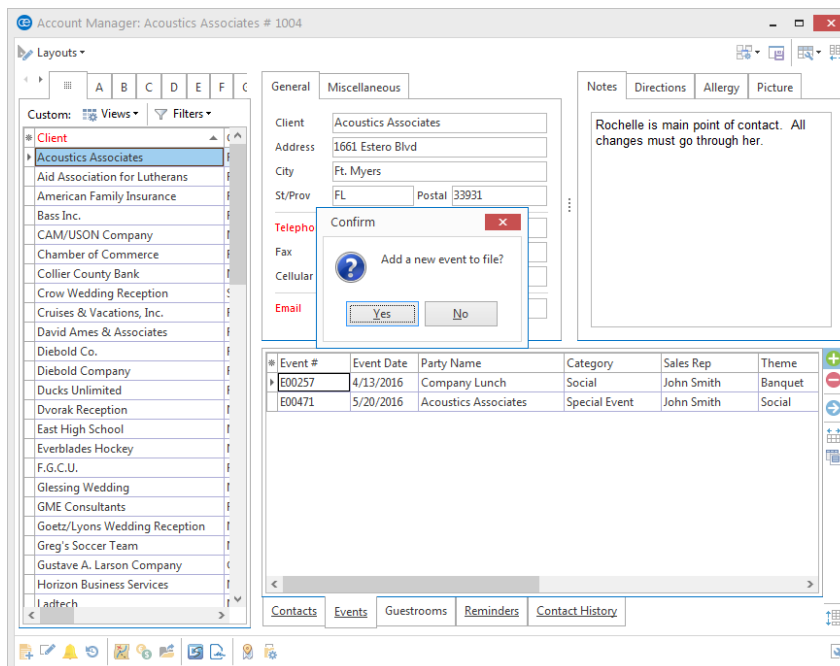
Because Account Manager is a "one-stop shop" for your client information, you can review details of all events a customer has booked, as well as retrieve those events (or even create new ones).

## Adding a New Event from Account Manager


1. Click the **Account Manager** button from the **Main** sidebar to access Account Manager.
2. Search for and retrieve the account whose events you want to review, edit, or add.
3. **[Optional]** Select a contact person on the **Contacts** tab at the bottom of the Account Manager screen to be the default contact of the new event you will add.  
**Note:** This step is optional; the contact person you select will default as the Booking and/or Site Contact of your new event, if you have enabled this option.
4. Click the **Events** tab at the bottom of Account Manager (if it is not already selected).  
**Result:** The list of events booked for the current account (past or future) is displayed.

**Tip:** As an alternative, you can click the **Event Wizard** button. You can then use the Event Wizard tool to book your new event, with the account you have chosen selected by default.

**Note:** This step is very important. The **Add a New Event** button  in the next step performs different functions, depending upon which tab is active in Account Manager.



Event #	Event Date	Party Name	Category	Sales Rep	Theme
E00257	4/13/2016	Company Lunch	Social	John Smith	Banquet
E00471	5/20/2016	Acoustics Associates	Special Event	John Smith	Social

5. Click the **Add a New Event** button , located on the right-hand side of the Account Manager screen.  
**Result:** A confirmation message appears. (If you have made changes to the account, you will be asked

*to save those changes before continuing.)*

**Note:** This button is identical to the **Add Record** button  at the top of your Caterease screen, which is used to add new accounts, so take care not to confuse them.

6. Click **Yes** to verify your choice.

**Result:** Event Manager will open and position you on a brand-new event for the customer you selected in Step 2, above.

## Retrieving Events from Account Manager

1. Click the **Events** tab in the bottom window of Account Manager (if it is not already selected).

**Result:** The list of events booked (past or future) for the current account are displayed.

2. Click on one of the events listed on that tab to select it.

3. Click the **Select** button , located on the lower right-hand side of the Account Manager screen (or you may simply double-click your selection).

**Result:** A confirmation message appears. (If you have made changes to the account, you will be prompted to save those changes before continuing.)


4. Click **Yes** to confirm your choice.

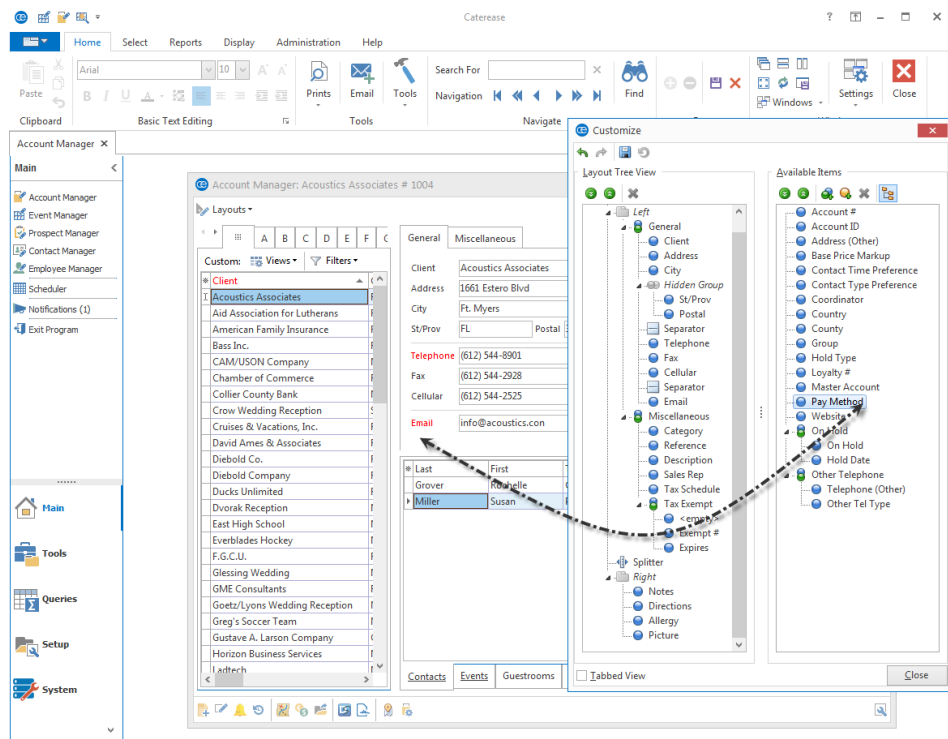
**Result:** You will be taken into Event Manager and placed on the event which you selected in Step 2, above.

# Assigning a Default Payment Method to an Account


You can assign a default payment method for each of your customers, and this payment will automatically be assigned to every new event they book. (Note: This field is not displayed in Account Manager by default; you might therefore need to begin with the steps under "Displaying the Pay Method Field," below.)

## Displaying the Pay Method Field


1. In Account Manager, click a tab at the top left (**General, Miscellaneous**) where you want the Pay Method field to be displayed.
2. Click your right mouse button within the tab and choose **Customize**.  
**Result:** The *Customize* window opens.  
**Note:** Do not right-click inside of fields, but rather on the tab itself.
3. On the right-hand side of the *Customize* window, hold your left mouse button down on the field titled Pay Method.
4. Drag the field into the tab on the Account Manager window, and place it beneath one of the existing fields.  
**Note:** It is important to note your cursor's position as you drag this field, as it will be easier to place this field beneath another field rather than to the right of a field. If you make a mistake, click the **Undo** button , located at the top left of the *Customize* window, and try again.



5. Once the Pay Method field is in position on the tab, release your mouse button.  
**Result:** The Pay Method field has been placed on the form.

6. Click **Close** on the Customize window to close the window.
7. Click the **Save Current Window Settings** button  at the top right of the Account Manager window to save this arrangement as the new default look for the window.


## Assigning a Default Pay Method

1. Click the **Account Manager** button from the **Main** sidebar to access Account Manager.
2. Locate and retrieve the account for which you wish to assign a default pay method.
3. At the top pane of Account Manager, click the tab that displays the Pay Method field.  
**Note:** *This field is not displayed by default; see "Displaying the Pay Method Field," below.*
4. Click into the Pay Method field and click the down arrow at the right.  
**Result:** *A custom quickpick list of payment methods appear.*
5. Click on a specific pay method in the list to select it as the default for all future events booked by this account.
6. Click the **Save Window Settings** button  at the top right of the Account Manager window to save this arrangement as the new default.

# Assigning a Default Site Location to an Account

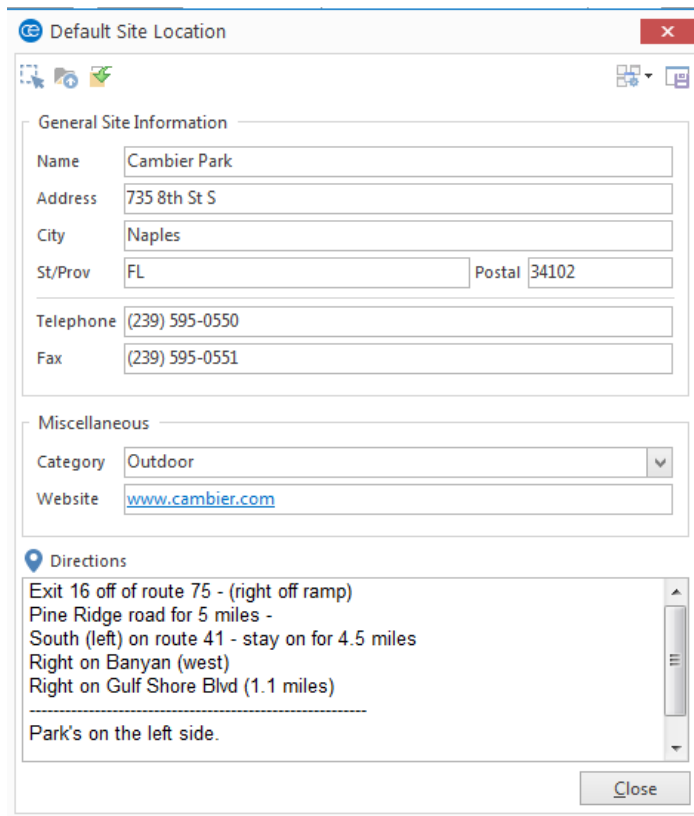
You can assign a default site location for each of your customers, and that location will serve as the default location for every new event they book (although you can easily change a site location, should the need arise).

## Assigning a Default Site Location

1. Click the **Account Manager** button from the **Main** sidebar to access Account Manager.
2. Locate and retrieve the account for which you wish to assign a default site location.
3. On the toolbar at the bottom of the Account Manager, click the **Default Site Location** button .

**Result:** The *Default Site Location* window opens.

**Note:** As an alternative, you can click the **Tools** button at the top of the screen and then click **Default Site Location** if you have customized your Tools Menu Shortcuts to include Default Site Location.



**Default Site Location**

**General Site Information**

Name: Cambier Park

Address: 735 8th St S

City: Naples

St/Prov: FL Postal: 34102

Telephone: (239) 595-0550

Fax: (239) 595-0551

**Miscellaneous**

Category: Outdoor

Website: [www.cambier.com](http://www.cambier.com)

**Directions**

Exit 16 off of route 75 - (right off ramp)  
 Pine Ridge road for 5 miles -  
 South (left) on route 41 - stay on for 4.5 miles  
 Right on Banyan (west)  
 Right on Gulf Shore Blvd (1.1 miles)  
 -----  
 Park's on the left side.

Close

4. Enter **General Site Information**, such as Name, Address, etc., by simply typing into each field and pressing your **[Enter]** or **[Tab]** key to move to the next field.
5. Optionally click into the **Directions** text block to enter detailed directions to the default site location.

**Note:** Click the **Site Locations Database** button  to select from your list of frequently used loc-

ations, or click the **Copy From Client** button  to use this company's address (and optional directions) as the default location.

6. **[Optional]** Click the **Add to Site Locations Database** button  to add this location to your program's default list for future use with other clients or events.
7. When finished, click **Close**.  
**Result:** *The window closes and your changes are saved.*

## Combining Duplicate Accounts

When you add a new client in Account Manager, Caterease will automatically warn you if it appears to be a duplicate of another customer by comparing the name and address (as well as ten-digit phone number) with other clients in the system. If you do end up adding duplicate accounts, the steps below will combine ALL of the records of both customers together: contact people, events, etc.

### Combining Duplicate Accounts

1. Click the **Account Manager** button in the **Main** group of the program's sidebar to access Account Manager.
2. Search for and retrieve the duplicate account which you want to remove from the program.
3. From the **Home** ribbon tab at the top of your screen, click the **Tools** button and choose **Combine Accounts**.  
***Result:** A confirmation prompt appears.*  
***Note:** It is important to be on the record you intend to remove from the program before continuing.*

**Note:** You may need to add this feature to your list of **Tools** shortcuts. To do so, click **Tools > Customize** and drag **Combine Accounts** into the Tools Menu Shortcuts pane.

4. Click **Yes** to confirm.  
***Result:** An account selection window opens.*
5. Select an existing account (or add a new one) to which you will reassign all of the events, contact people, and other details of the client you are removing.

## Unit 16: Managing Accounts (Customers)

Select Account To Combine Into

Search For

Client

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
* Client																	
▶ Crow Wedding Reception																	
▶ Cruises & Vacations, Inc.																	
▶ David Ames & Associates																	
▶ Diebold Co.																	
▶ Diebold Company																	
▶ Ducks Unlimited																	
▶ Dvorak Reception																	
▶ East High School																	
▶ Everblades Hockey																	
▶ F.G.C.U.																	
▶ Glessing Wedding																	
▶ GME Consultants																	
▶ Goetz/Lyons Wedding Reception																	
▶ Greg's Soccer Team																	
▶ Gustave A. Larson Company																	
▶ Horizon Business Services																	
▶ Ladtech																	
▶ Lebron Corporation																	
▶ Lenox/Uchtman Wedding																	
▶ Lutheran Marriage Encounter																	

OK Cancel

6. Click **OK**.

**Result:** A confirmation message appears.

7. Click **Yes** to confirm.

**Result:** The information from your first account (selected in Step 2, above) is moved to your second account (selected in Step 5, above) and you are prompted to delete the first account from Step 2.

8. Click **Yes** to delete the first account (selected in Step 2, above).

**Result:** The account is deleted.

## Printing a Consolidated Billing Statement

1. Click the **Home** ribbon tab at the top of the screen, if it is not already selected.
2. Click the bottom half of the **Prints** button, located in the main toolbar at the top of your screen, and choose **Account Manager**.
3. Select **Billing Statement**.

**Result:** The Billing Statement window opens, listing all parties on record for the customer.

**Note:** Click into the checkbox at the bottom left of the Billing Statement window to see only events with a current balance or to have the Billing Statement close after the print preview has been generated.

The screenshot shows the 'Billing Statement' window. It contains two main sections: 'Select Events To Include In Billing Statement' and 'Select Group Bookings To Include In Billing Statement'.

**Select Events To Include In Billing Statement**

* Event #	Event Date	Party Name	Status	Total	Paid	Balance
E00429	1/30/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36
E00430	2/13/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36
E00431	2/27/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36
E00432	3/19/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36
E00385	4/2/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36
E00386	4/16/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36
E00387	4/30/2016	Naples Dental Assoc.	Definite	\$662.36	\$0.00	\$662.36

1 of 12

**Select Group Bookings To Include In Billing Statement**

* Log #	Arrival	Departure	Group Name	Status	Total	Paid	Balance
<No data to display>							

0 of 0

☐ ONLY Records with Current Balances  
☐ Close After Printing

OK Cancel

4. Highlight the records you would like to include in your Billing Statement print.  
**Note:** Hold your left mouse button down and drag over multiple records to highlight, or hold the **[Ctrl]** key down to select individual records.
5. Click **OK**.  
**Result:** A print preview of the Billing Statement is generated, listing details from the parties you selected in Step 4, above.
6. Click the **Print** button at the top left of the print preview screen to print.



## Unit 17: Managing Prospective Leads

In this section, you will learn:

- Adding a New Prospect in Prospect Manager
  - Adding Contact People to a Prospect
  - Creating Next Actions and Action Dates
  - Setting a Prospect Status
- Establishing a Filter in Prospect Manager
  - Creating a Prospect Proposal
  - Printing a Prospect Proposal
  - Copying a Proposal
  - Creating an Event from a Proposal



## Adding a New Prospect in Prospect Manager

Prospect Manager allows you to maintain a detailed database of leads, separate from your accounts in Account Manager. You can track your history with these leads, including your next action and its action date, and then quickly promote those leads to active accounts whenever they are ready to accept a proposal for an event. Prospect Manager gives you the power to manage your leads from start to finish, in that you have a dynamic import tool in which to pull customers into the program, and the capability to generate batch prints or e-mails to market to an entire group of leads.

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.

2. Click the **Add Record** button , located in the main toolbar at the top of your Caterease screen.

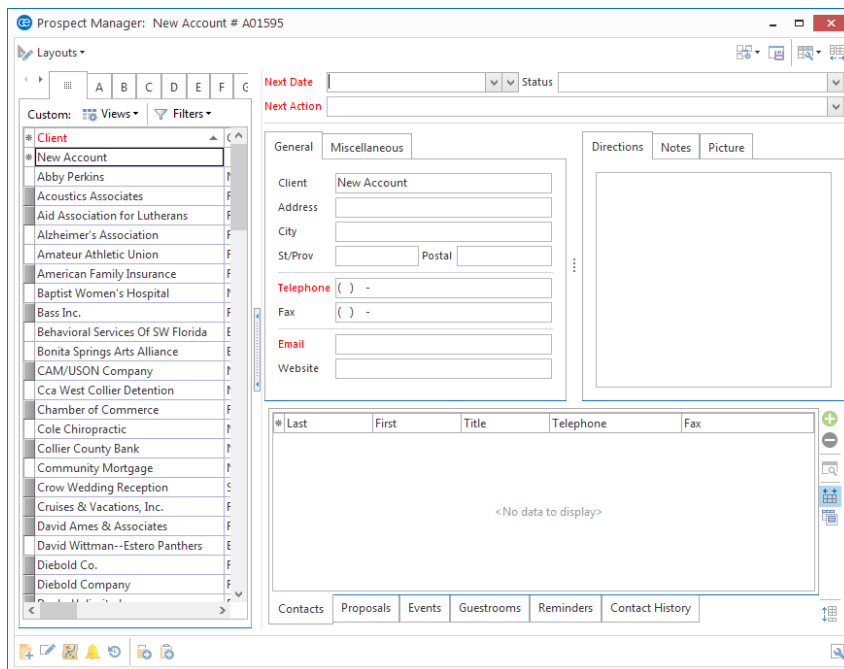
**Result:** A confirmation message appears.

3. Click **Yes** to confirm your choice.

**Result:** A new prospect record is added, with the default name of "New Account."

**Note:** If your new prospective customer is an individual (as opposed to a company), see "Adding a Customer Who Is Not a Company," below.

**Tip:** Once you have added your new prospect, you will probably want to add information about a specific contact person.



4. Type the name of your new prospect into the Client field, and press **[Tab]** or **[Enter]** to move to the next field.

**Result:** The name you type replaces the default name "New Account."

**Note:** You can add, remove, or rearrange fields on this and other areas of the screen.


5. Continue to fill out the fields on the **General** tab as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.

6. **[Optional]** On the **Miscellaneous** tab, located to the right of the **General** tab, type into a field or click the down arrow to the right of each field to make a choice from the corresponding quickpick lists.  
***Note:** These fields are used for tracking your prospects, and are entirely optional. Also available (by default) on this tab is the option to make a client tax exempt by clicking into the **Tax Exempt** checkbox.*
7. **[Optional]** Click the **Directions** tab and type into the text block as desired if you wish to include directions to this prospect's facility.  
***Note:** You may also paste copied directions into the text block.*
8. **[Optional]** Click the **Notes** tab and type any notes into the text block as desired.
9. **[Optional]** Click the **Picture** tab, then right-click within the white text block area and choose **Load From File** if you wish to include a digital image to associate with this prospect.

## Adding Contact People

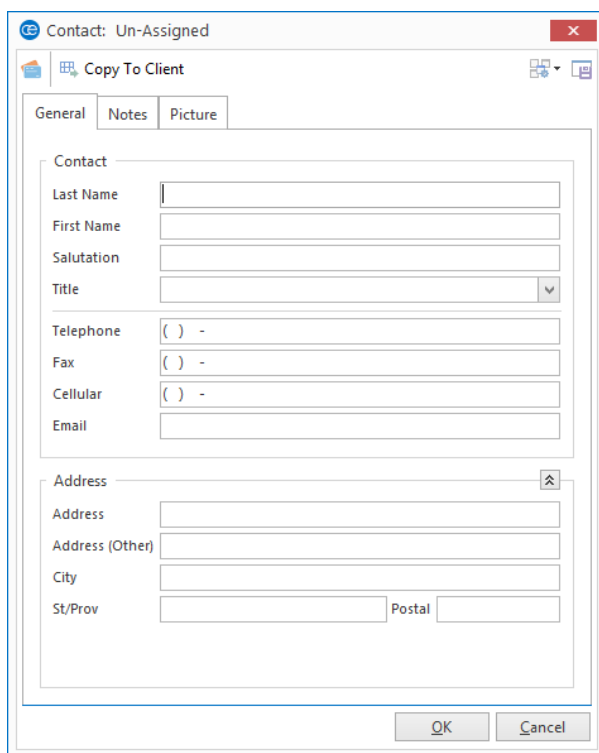
If a prospective customer decides to book an event with your company, you can easily make that prospect into an active account in Prospect Manager, and all of your contact people and history notes will be transferred into Account Manager (the main account maintenance module) along with it. Of course, you are always free to add additional contact people in Account Manager (or in Event Manager) as the need arises.

### Adding Contact People to a Prospective Account


1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Find the prospect to which you wish to add a contact person, or add a new one.
3. Click the **Contacts** tab, located at the bottom left-hand side of the Prospect Manager screen, if it is not already selected.
4. Click the **Add A New Contact** button , located at the right-hand side of the screen.

**Result:** The Contact window opens.

**Tip:** You can click **Copy to Client** at the top left of the New Contact window to copy all contact person details - name, address, phone, etc. - to the client (or prospect), so you do not have to type that information more than once. As a default, the name will copy in the format of Last Name First Name.



5. Type the contact person's last name into the Last Name field, and press **[Tab]** or **[Enter]** to move to the next field.
6. Type the contact person's first name into the First Name field, and press **[Tab]** or **[Enter]**.

7. Type the salutation into the Salutation field.  
**Note:** Examples include *John, Mr. Smith, Dr. Jones, etc.*
8. Click the down arrow to the right of the Title field, and select an option from the drop-down quickpick list. See "Creating Quickpick Lists for Status, Next Action, and Proposal Status," below.
9. Continue to fill out the fields on the **General** tab as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.
10. **[Optional]** Click the **Credit Card Information** button  and complete the credit card information for the contact.
11. **[Optional]** Click the **Notes** tab and type any desired notes pertaining to this contact person.  
**Note:** These notes do not print anywhere; they are merely here for your on-screen reference. You can format the text by highlighting the text, clicking your right mouse button, and choosing **Font**.
12. **[Optional]** Click the **Picture** tab, then right-click within the text block and choose **Load From File** if you wish to include a digital image to associate with this prospect.
13. When finished, click **OK**, located at the bottom of the form, to close the form and save your changes.  
**Result:** The contact person's name appears in the grid.
14. Continue adding contacts as desired.  
**Note:** The first contact person entered is designated as the primary contact.

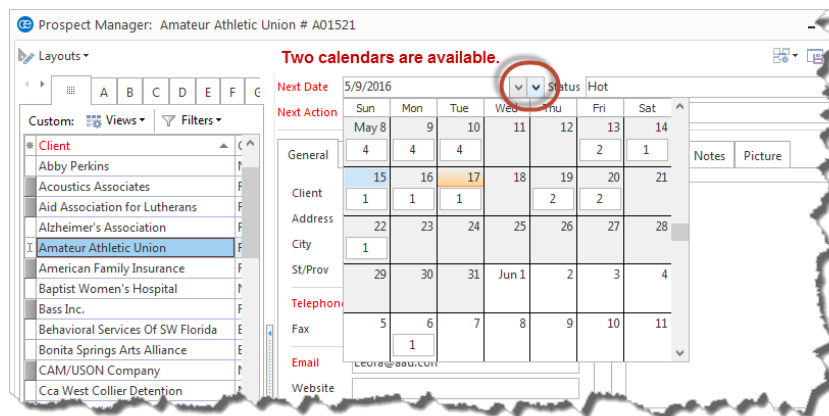
## Creating Next Actions and Action Dates

When you are prospecting your leads in Prospect Manager, you will want to schedule the next action you need to take for each of those leads. This Next Action field is a quickpick list you can customize in order to create a list of common actions and not have to type the same thing more than once. In addition, you can set up a filter in your Prospect Manager to instantly show you all prospects with a next action date of today (and, for that matter, your name as a sales rep), all with the click of a button!

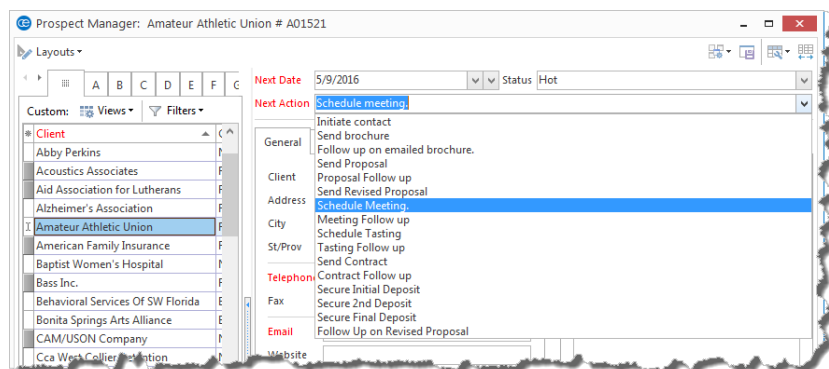
### Adding Next Actions and Next Action Dates

1. Locate the prospect record you would like to set a next action for, or add a new prospect.
2. Click into the Next Date field, located at the top of the screen, towards the middle.
3. Type a next-action date into the field, or click the down arrow to the right of the field to access a drop-down calendar.

**Note:** There are two calendars from which to choose: The first drop-down calendar (to the immediate right of the Next Date field) drops down the standard calendar view; the second drop-down calendar (displayed below) indicates the number of next actions that have been set for a particular date.



4. Click the down arrow to the right of the Next Action field and select an option from the quickpick list.



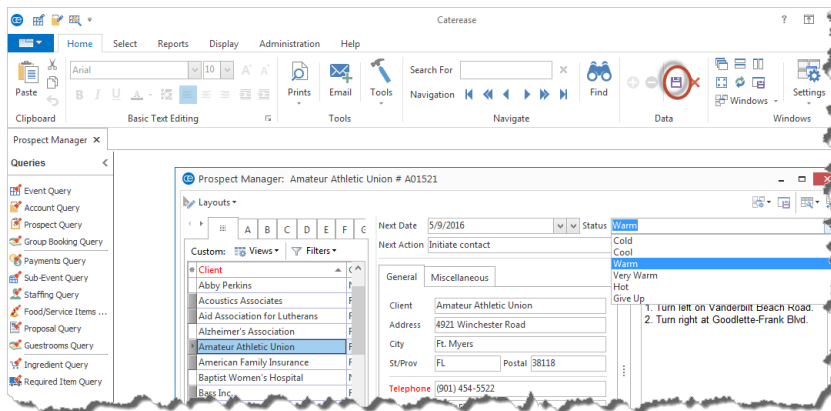
5. Click the **Save Changes** button  , located in the main toolbar at the top of the screen.

## Setting a Prospect Status

You can assign a status to a prospect, using a custom quickpick list of options, so you can track its progression from lead to account.

### Assigning a Status to a Prospect

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Click the Status field, located towards the top right-hand side of the window.
3. Click the down arrow at the far right of the field to choose a status for the prospect from the customizable quickpick list.





4. Click the **Save Changes** button  , located in the main toolbar at the top of the screen.



## Establishing a Filter in Prospect Manager

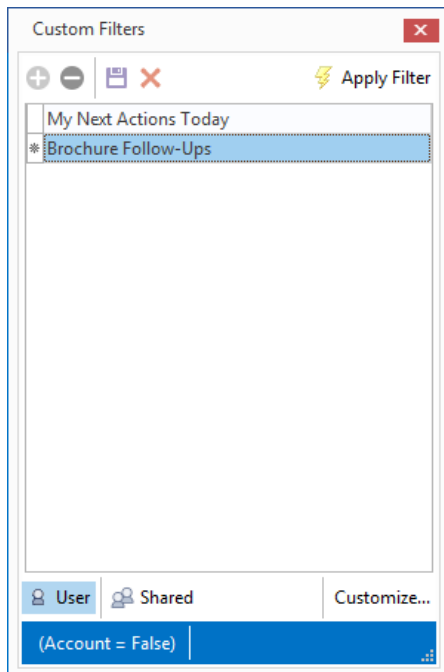
Perhaps at any time you might see more records in your Prospect Manager grid than you really want to look at. You can instantly (and temporarily) filter out certain records from your grid based on next actions, next action date, follow-up type, etc.

### Establishing a Filter

1. From your main Prospect Manager screen, click the **Display Full Grid** button , located at the upper right-hand side of the screen.  
**Result:** Your Prospect Manager opens in full-grid mode.
2. Click the **Quick Column Customizing** button , located to the left of the Client/Organization field.  
**Result:** A drop-down list of column headings displays.
3. Click the checkbox next to the desired field name, such as Next Action and/or Next Date.
4. Click the funnel at the right of a particular column heading--for example, the column heading labeled Next Action, and select a snap filter from the drop-down option (or create a custom filter).

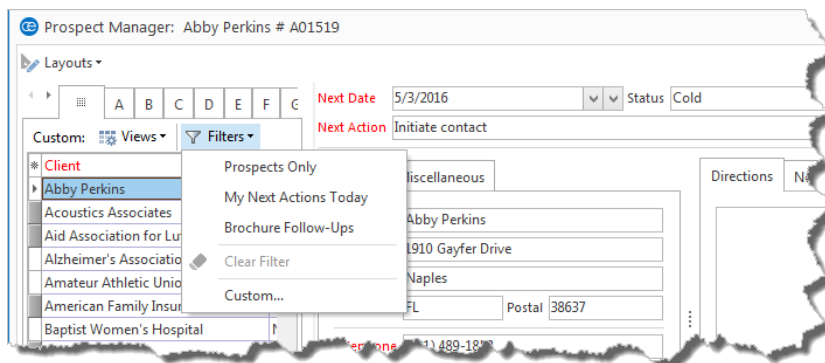
### Saving a Filter

1. Establish a filter, as outlined above.
2. Click the **Filters** button, located at the top left-hand side of the Prospect Manager screen.
3. Click **Custom**.  
**Result:** The Custom Filters window opens.
4. **[Optional]** Click the **Shared** button at the bottom of the Custom Filters window if you want this custom filter to be shared with other users on your Caterease network. (Available if you own the Professional version of Caterease.)  
**Note:** The **User** button, selected by default, means this filter is only available under your user name.
5. Click the **Add Filter** button .  
**Result:** A new filter is added to your list, with the default name "New Filter."
6. Type a name for your new filter into the field.
7. Click the **Save Current Filter** button .  
**Result:** Your new filter is saved.



## Retrieving a Previously Saved Filter



1. Click the **Filters** button, located at the upper left-hand side of your main Prospect Manager screen.  
**Result:** The list of custom filters you have created display in a drop-down list.
2. Select the filter from the drop-down list.



# Creating a Prospect Proposal

You can create a detailed proposal in Prospect Manager without needing to make the prospect into an active client. Basic details, such as theme, date, times, price estimates, etc., can be included, and prints that include these details can be easily generated.

## Filling out the Proposals Tab

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Click the **Proposals** tab, located near the bottom of the screen.
3. Click the **Add A New Proposal** button , located on the right-hand side of the screen.  
***Result:** The Proposal window opens, on the **General** tab.*
4. Type the party name into the Party Name field, and press **[Tab]** or **[Enter]**.
5. Type a theme into the Theme field or click the down arrow to the right of the field to select an option from the quickpick list.
6. Continue to fill out the General Proposal information as desired by making selections from the drop-down quickpicks.
7. In the **Event Information** section, select the proposed event date by clicking the down arrow to the right of the Date field to access the calendar tool.
8. **[Optional]** Select a Status from the drop-down list.  
***Note:** Status options can be added through **Setup > Quickpicks > Prospect Manager > Proposal Status**.*
9. Type the time into any Time fields, or click the **Time Wizard** button  to graphically select the desired times.
10. Type the planned guest count into the Planned or Actual field.
11. Click the **Miscellaneous** tab, located to the right of the **General** tab, and make your selections from the drop-down lists.
12. **[Optional]** Click into the Notes text block and type any proposal notes, or use the Scratch Pad to insert pre-formatted text.

## Unit 17: Managing Prospective Leads

**Proposal**

Print ▾ | Layouts ▾

Client Information		Financials	
Client	Abby Perkins	Subtotal	\$0.00
Address	1910 Gayfer Drive	Serv Chg	\$0.00
	Naples, FL 38637	Tax	\$0.00
Telephone	(901) 489-1853	Total	\$0.00

**Proposal** | Details

General | Miscellaneous

Business Type: On-Premise ▾  
Operation: Riverside Banquet Center ▾

Event Information

Date: 5/27/2016 ▾  
Status: ▾  
Start: 05:00 PM ▾ Serving: ▾  
End: 10:00 PM ▾ Bar: ▾  
Delivery: ▾  
Planned: 50 Actual: ▾



Notes

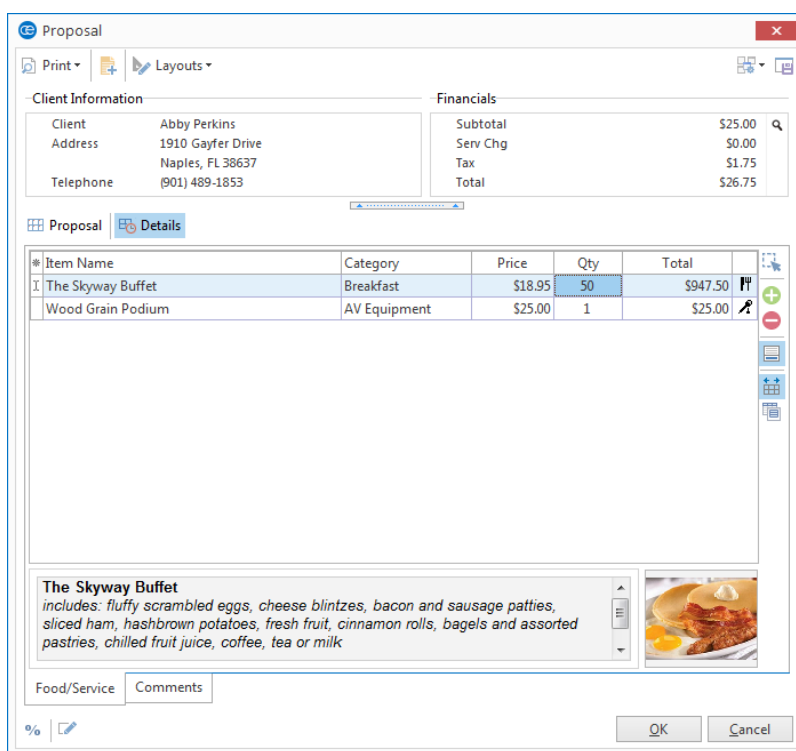
8' Foot Tables  
Chairs  
52" Rounds  
Chafers  
Heat Lamps  
Coffee Urns

% |

OK Cancel

## Filling out the Details Tab

1. Click the **Details** tab, located to the right of the **Proposals** tab.  
**Result:** The Proposal window opens, and you are positioned on the **Food/Service** tab.
2. Click the **Display Menus** button , located on the right-hand side of the screen, and select food/service items.
3. [Optional] Click the **Add Menu Item** button  to add a new proposal item on-the-fly.
4. [Optional] Click the **Comments** tab, located at the bottom of the window, and enter proposal comments into the text block or retrieve pre-formatted text from the Scratch Pad.
5. When finished, click **OK**.



**Proposal**

Print ▾ | Layouts ▾

Client Information		Financials	
Client	Abby Perkins	Subtotal	\$25.00
Address	1910 Gayfer Drive	Serv Chg	\$0.00
	Naples, FL 38637	Tax	\$1.75
Telephone	(901) 489-1853	Total	\$26.75

Proposal | **Details**

#	Item Name	Category	Price	Qty	Total
1	The Skyway Buffet	Breakfast	\$18.95	50	\$947.50
	Wood Grain Podium	AV Equipment	\$25.00	1	\$25.00

**The Skyway Buffet**  
includes: fluffy scrambled eggs, cheese blintzes, bacon and sausage patties, sliced ham, hashbrown potatoes, fresh fruit, cinnamon rolls, bagels and assorted pastries, chilled fruit juice, coffee, tea or milk

Food/Service | Comments

OK Cancel

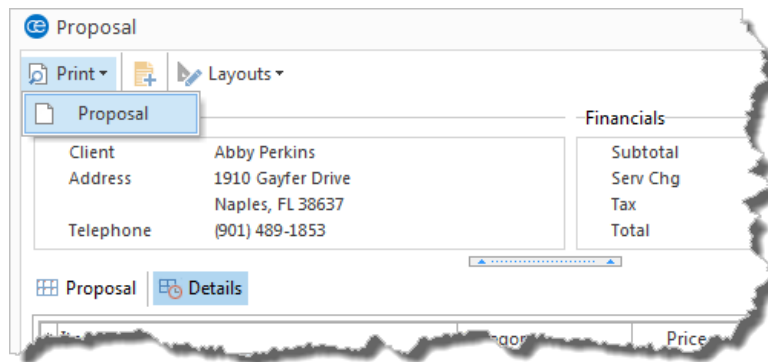
## Printing a Prospect Proposal

1. From the Proposal window in Prospect Manager, click the **Print** button at the top left-hand side of your screen.

2. Select **Proposal**.

**Result:** A Print Preview screen displays.

**Note:** You may be prompted to save your changes.




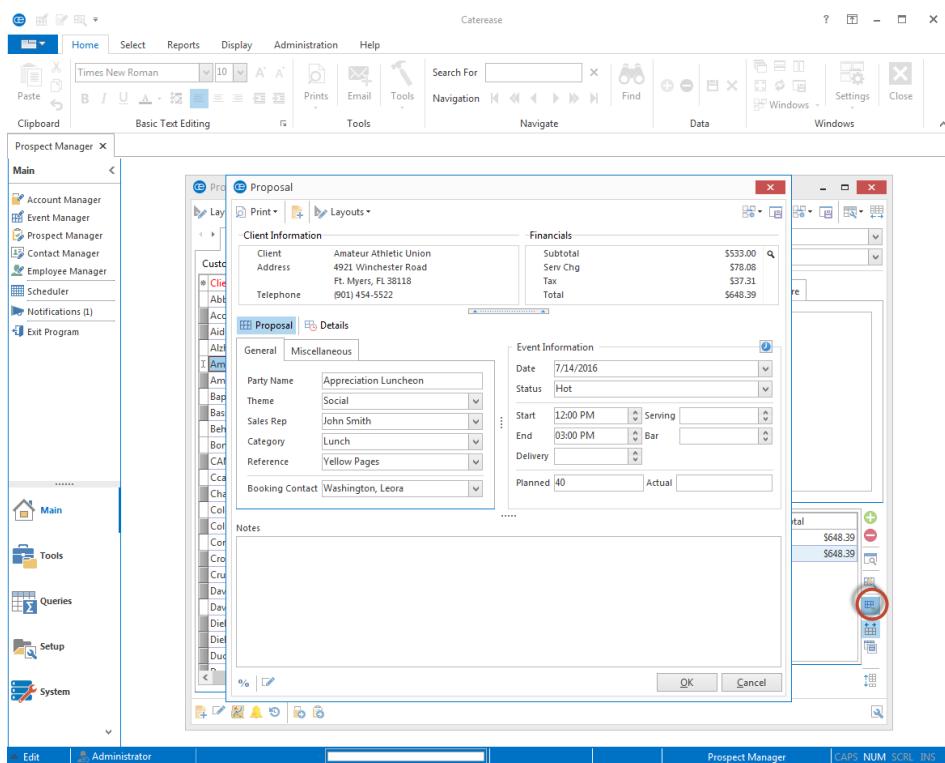
3. From the available options at the top of the screen, you may elect to print the document or e-mail the document., as described in previous sections of this guide.
4. **[Optional]** Click the **Setup** button on the Print Preview screen to change the selected printer or the number of pages or copies.  
**Result:** The Printer Setup window opens, allowing you to change various printer option.  
**Note:** If you perform this step, you must click **OK** before moving to Step 5, below.
5. Click the **Print** button from the Print Preview screen.

# Copying a Proposal

If a prospect or active account would like a proposal that consists of almost the same event details as a previous proposal, you can make a quick copy of the proposal, then make any necessary changes to the new copy.

## Copying a Prospect Proposal

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Click the **Proposals** tab, located near the bottom of the screen.
3. Click on the proposal you would like to copy, from the grid.
4. Click the **Copy Proposal** button , located on the right-hand side of the screen.  
**Result:** A confirmation prompt appears.
5. Click **Yes** to confirm.  
**Result:** A copy of the proposal displays.
6. Fill in the proposal details as desired, selecting or adding proposal items.



The screenshot displays the Caterease software interface. The main window shows a 'Proposal' form with the following details:


- Client Information:**
  - Client: Amateur Athletic Union
  - Address: 4921 Winchester Road, Ft. Myers, FL 38118
  - Telephone: (801) 454-5522
- Financials:**
  - Subtotal: \$533.00
  - Serv Chg: \$78.08
  - Tax: \$37.31
  - Total: \$648.39
- Event Information:**
  - Date: 7/14/2016
  - Status: Hot
  - Start: 12:00 PM
  - End: 03:00 PM
  - Delivery: Bar
  - Planned: 40
  - Actual:
- General Information:**
  - Party Name: Appreciation Luncheon
  - Theme: Social
  - Sales Rep: John Smith
  - Category: Lunch
  - Reference: Yellow Pages
  - Booking Contact: Washington, Leora
- Notes:** A large text area for additional details.

The interface includes a sidebar with navigation options and a status bar at the bottom showing the user is an Administrator in the Prospect Manager module.

## Creating an Event from a Proposal

You can create an event directly from a proposal, with the click of a button.

### Creating an Event from a Proposal

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Click the **Proposals** tab, located near the bottom of the screen.
3. Select the proposal that you would like to make into an event by clicking on it in the grid.
4. Click the **Create Event From Proposal** button  , located on the right-hand side of the screen.  
***Result:** A confirmation prompt appears.*
5. Click **Yes** to confirm.  
***Result:** You are placed on Step 2 of the Event Wizard.*
6. Fill in the event details as desired.
7. When finished, click **OK**.

## Unit 18: Creating Reminders and History Notes

In this section, you will learn:


- Creating Contact History Items in Prospect Manager
  - Creating Reminders in Prospect Manager
  - Creating a New Reminder in Event Manager
- Creating a New Contact History Note in Event Manager
  - Creating a Contact History Note from an Email
  - Creating Automatic Reminders
- Managing Reminders and History Notes



## Creating Contact History Items in Prospect Manager

You can use Contact History Notes in your Prospect Manager to keep track of conversations and tasks pertaining to your prospective customers. When you take a phone call, send an e-mail, etc., you can quickly log that occurrence in a Contact History Note, which will automatically be stamped with the current date and time. Once that prospective customer becomes an active account, all notes can be managed in Contact Manager and tracked via prints and reports.

### Creating a New Contact History Note from Prospect Manager

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar.
2. Search for and select the prospect for whom you would like to add a contact history note.
3. Click the **New Contact Item** button , located at the bottom of your screen, or from the **Tools** drop-down list from the **Home** ribbon tab, depending on your personal configuration.  
**Result:** The Contact Item window opens.

**Note:** You can also click the **Add a New Contact Item** button  from the **Contact History** tab.

4. Type a subject into the Subject field, or select a subject from the drop-down quickpick list.
5. Complete the Date field by clicking the down arrow to the right of the field to access the calendar tool.  
**Note:** The current date is populated, by default.
6. Complete the Time field by typing directly into the field or using the up-and-down arrows to adjust the time.  
**Note:** The current time is populated, by default.

7. Complete the following Contact History Information fields:

- **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.
- **User** -- This is the person who performed the task to which this contact history note refers. Accept the default name or click the down arrow at the right of the field and choose an option from the drop-down list.
- **Contact** -- Click the down arrow to the right of the Contact field and select an existing contact or add a new contact.

8. Type the Contact History action into the Comment text block.  
**Note:** You may also access the *Scratch Pad* to insert pre-formatted text.

9. When finished, click **OK**.

CE Contact Item: Amateur Athletic Union...

Subject: Amateur Athletic Union...

Date: 5/17/2016 Time: 09:57 AM

Category: Phone - Incoming

User: Administrator

Contact: Washington, Leora

Comment


Leora called to change the billing address.

OK Cancel

# Creating Reminders in Prospect Manager

Prospect Manager allows you to create a single next action and its action date and then filter your records so you can view all actions that are due that day. However, if you want to create reminders that will prompt you the moment you open Caterease, you can do so if you own the Contact Manager add-in to the program.

## Creating a New Reminder

1. Access Prospect Manager by clicking the **Prospect Manager** button from the **Main** Caterease sidebar group.
2. Click the **New Reminder** button  , located on the toolbar at the bottom of the screen, or from the **Tools** button at the top of the screen, depending on your personal configuration.  
**Result:** *The Reminder window opens.*

**Note:** You may also click the **Add a New Reminder** button  from the **Reminders** tab.

3. Complete the following information in the Reminder fields.
  - **Subject:** Type a **Subject** for this reminder, or click the down arrow to the right of the field to select items from a drop-down quickpick list.
  - **Location:** Type a **Location** to associate with this reminder, or select from the drop-down quickpick list.
  - **Label:** Optionally assign a **Label** to the reminder by selecting an option from the drop-down list of options.
  - **Start Date:** In the first field to the right of **Start**, click the down arrow and select a start date from the drop-down calendar.  
**Note:** *The current date is entered by default.*
  - **Start Time/End Time:** [Optional] Enter **Start** and **End** times by typing directly into the fields or using the up-and-down arrows to select the times.  
**Note:** *The current Start time is entered by default. This time will be displayed with the reminder, but will not control what time the reminder appears; in other words, a reminder might state you need to do something at 12:00 p.m., but it will appear when you first open Caterease that day.*
  - **End Date:** In the first field to the right of **End**, click the down arrow and select an end date from the drop-down calendar.
  - **Reminder Active:** The check mark in the **Reminder Active** checkbox designates the reminder as active; removing the check mark makes the reminder inactive. The "Active" times may be adjusted by clicking the down arrow to the right of the field and choosing from the drop-down list.

Reminder: Abby Perkins...

Subject: Abby Perkins...

Location: Phone Label: ☐ None

Start: 4/19/2016 03:20 PM ☐ All day event

End: 4/19/2016 03:25 PM

☒ Reminder Active 15 minutes Show time as: ☒ Busy

Client: Abby Perkins

Contact: Perkins, Abby Link:

Category: Urgent

User: Default Administrator

Message

Call to confirm guest count.

OK Cancel

4. Complete the following information in the Reminder Information fields.

- **Client:** This is the client/organization to which the reminder pertains. You can accept the default or click the magnifying glass to the right of the field to search for another client/organization.
- **Contact:** This is the contact person at the company to which this reminder pertains. You can accept the default or click the down arrow to the right of the field and choose another contact (or edit the existing one).
- **Link:** This button will link the reminder to the event you are currently on. You can click the magnifying glass to the right of the field to view the linked event information.
- **Category:** Type into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.
- **User:** This is the person to be reminded. Accept the default name or click the down arrow at the right of the field and choose an option from the quickpick list.  
**Note:** Select **Everyone** if you would like the reminder to be seen by all users.

5. Click into the Message text block and type in the action this reminder is being used for.

**Note:** You may also access the *Scratch Pad* to insert pre-formatted text.


6. When finished, click **OK**.

**Result:** *The window closes and the reminder has been created.*

## Creating a New Reminder from Event Manager

If you own the Caterease Contact Manager add-in, you can create reminders directly from Event Manager; there is no need to open your Contact Manager.

### Creating a New Reminder from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** sidebar group located on the left-hand side of your screen.
2. Click the **New Reminder** button , located at the bottom of the screen.  
**Result:** *The Reminder window opens.*
3. Complete the following information in the Reminder fields.
  - **Subject** -- Type a Subject for this reminder, or click the down arrow to the right of the field to select items from a drop-down quickpick list.  
(See Unit 5 for information about managing your quickpick lists.)
  - **Location** -- Type a Location to associate with this reminder, or select from the drop-down quickpick list.
  - **Label** -- Optionally assign a Label to the reminder (Business, Personal, etc.), by selecting from the drop-down list of options.
  - **Start Date** -- In the first field to the right of Start, click the down arrow and select a start date from the drop-down calendar.  
**Note:** *The current date is entered by default.*
  - **Start Time/End Time** -- **[Optional]** Enter start and end times by typing directly into the fields or using the up-and-down arrows to select the times.  
**Note:** *The current Start time is entered by default. This time will be displayed with the reminder, but will not control what time the reminder appears; in other words, a reminder might state you need to do something at 12:00 p.m., but it will appear when you first open Caterease that day.*
  - **All Day Event** -- Click into this checkbox if the event is to last the entire day. (Selecting this option will remove the Start and End times from the window.)
  - **End Date** -- In the first field to the right of End, click the down arrow and select an end date from the drop-down calendar.
  - **Show Time As:** Optionally select an option from the drop-down list (Free; Tentative; Busy; Out of Office).
  - **Reminder Active** -- The check mark in the **Reminder Active** checkbox designates the reminder as active; removing the check mark makes the reminder inactive. The "Active" times may be adjusted by clicking the down arrow to the right of the field and choosing from the drop-down list.
  - **Client** -- This is the client/organization to which the reminder pertains. You can accept the default or click the magnifying glass to the right of the field to search for another client/organization.

- **Contact** -- This is the contact person at the company to which this reminder pertains. You can accept the default or click the down arrow to the right of the field and choose another contact (or edit the existing one).
- **Link** -- This button will link the reminder to the event you are currently on. You can click the magnifying glass to the right of the field to link the reminder to another event.
- **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.
- **User** -- This is the person to be reminded. Accept the default name or click the down arrow at the right of the field and choose from the drop-down list of options.

**Note:** Select **Everyone** if you would like the reminder to be seen by all users.

Reminder: Abby Perkins...

Subject: Abby Perkins...

Location: Phone Label: None

Start: 4/19/2016 03:20 PM All day event: ☐

End: 4/19/2016 03:25 PM

☒ Reminder Active 15 minutes Show time as: Busy

Client: Abby Perkins

Contact: Perkins, Abby Link:

Category: Urgent

User: Default Administrator

Message: Call to confirm guest count.

OK Cancel

4. Click into the **Message** text block and type in the action this reminder is being used for.

**Note:** You may also access the Scratch Pad  to insert pre-formatted text.

5. When finished, click **OK**.


**Result:** The window closes and the reminder has been created.

**Tip:** Set up your Scratch Pad notes from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.

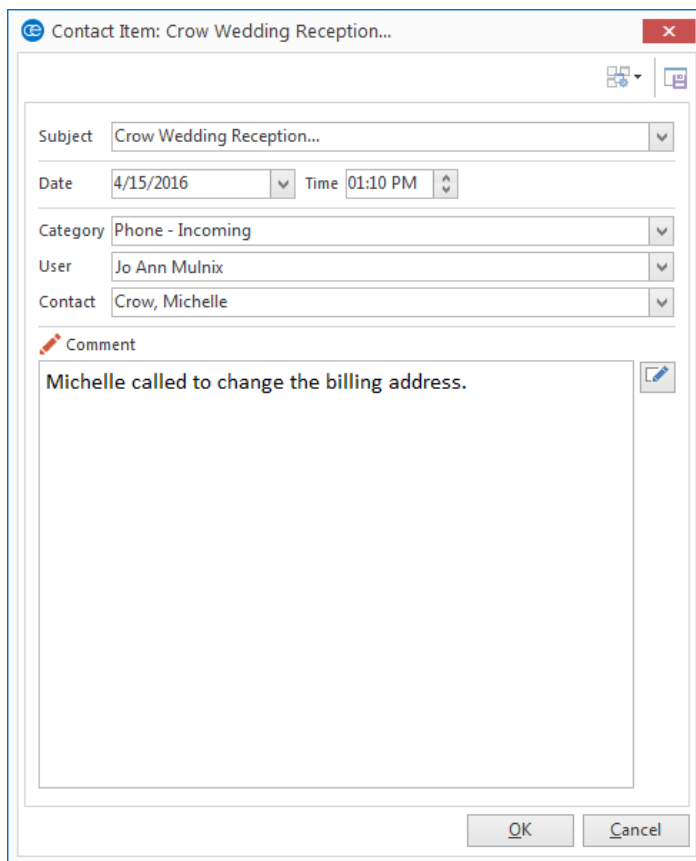
## Creating a New Contact History Note from Event Manager

If you own the Contact Manager add-in, you can use Contact History Notes to keep track of conversations and tasks pertaining to clients or events. When you take a phone call, edit an event, etc., you can quickly log that occurrence in a Contact History Note, which will automatically be stamped with the current date and time, in your Event Manager.

### Adding a New Contact History Note In Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** sidebar group on the left-hand side of your screen.
2. Search for and select the account to which you would like to add a contact history note.
3. Click the **New Contact History Item** button , located in the toolbar on the bottom left-hand side of your screen (or access this tool from your **Tools** menu, located in the main ribbon tab at the top of your screen, depending on your personal configuration).

**Result:** *The Contact Item window opens.*



CE Contact Item: Crow Wedding Reception...

Subject: Crow Wedding Reception...

Date: 4/15/2016 Time: 01:10 PM

Category: Phone - Incoming

User: Jo Ann Mulnix

Contact: Crow, Michelle

Comment

Michelle called to change the billing address.

OK Cancel

4. Type a subject into the **Subject** field, or select a subject from the drop-down quickpick list. (See Unit 5 for information about managing your quickpick lists.)

5. Complete the Date field by clicking the down arrow to the right of the field to access the calendar tool.

**Note:** The current date is populated by default.

6. Complete the Time field by typing directly into the field or using the up-and-down arrows to adjust the time.

**Note:** The current time is populated by default.

7. Complete the following Contact History Information fields:

- **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list.
- **User** -- This is the person who performed the task to which this contact history note refers. Accept the default name or click the down arrow at the right of the field and choose from the drop-down list of options.
- **Contact** -- Click the down arrow to the right of the Contact field and select an existing contact or add a new contact.

8. Type the Contact History action into the **Comment** text block.


**Note:** You may also access the Scratch Pad  to insert pre-formatted text.

9. When finished, click **OK**.

**Tip:** Set up your Scratch Pad notes from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.

## Creating a Contact History Note from an Email


A Contact History Note is a written (or in this case, typed) record of some action you did or conversation you had related to a certain client. For example, if a customer calls to change the menu for their order, you may want to make a record of that call for future reference. You are able to keep a record of proposals and contracts directly from your e-mail window.

1. Click the **E-mail** button at the top of your Event Manager screen.  
**Note:** *This button is also available from any Print Preview screen, and will automatically attach whatever print you are previewing (Contract, Billing Statement, etc.), to the outgoing e-mail.*
2. In the To... field, type the e-mail address of the person you want to send your e-mail to, or click the **Address Book** button  to access a list of e-mail addresses for all contact people associated with this account.  
**Note:** *You can also access the list of e-mail addresses by clicking on the word **To** at the left of the field. Note that this list is not your address book from Outlook; rather, it is the list of e-mail addresses you've entered into CaterEase for the contact people of this e-mail recipient.*
3. **[Optional]** In the Cc field, type the e-mail address of the carbon copy recipient here (separate multiple recipient addresses by semicolons).
4. **[Optional]** In the Bcc field type the e-mail address of the blind carbon copy recipient here (separate multiple recipient addresses by semicolons).
5. In the Subject field, type a subject for your e-mail, or click the down arrow to the right of the field to access a custom quickpick list.
6. Click into the large white text box in the window.
7. Type a message as the body of your e-mail.  
**Note:** *If you own the Marketing Tools package, you can use one of your custom merge letters as the body of your e-mail. These letters will automatically merge in information from the current prospect, including name, salutation, current date, etc.*
8. **[Optional]** Format the text of your e-mail using the formatting toolbar on your e-mail window.
9. **[Optional]** Click the **Attach** button at the top of the e-mail window and choose **File** to attach a file (choose **Print** to attach a print).  
**Note:** *Attached files/prints will appear in the small pane at the bottom of the e-mail window.*
10. Click the **Contact History** tab.
11. Type a contact history comment into the Comment field. Comments might include "Emailed Proposal," "Response to Email about menu change," etc.
12. Type a contact history category into the Category (or select an option from the drop-down quickpick list to the right of the field).

13. Click the **Auto-Save Email Content** button  to have Caterease automatically save your e-mail content; click **Auto-Save Email Content > Auto Save Contact History Item Content** to automatically save your email content and log the email as a contact history item.

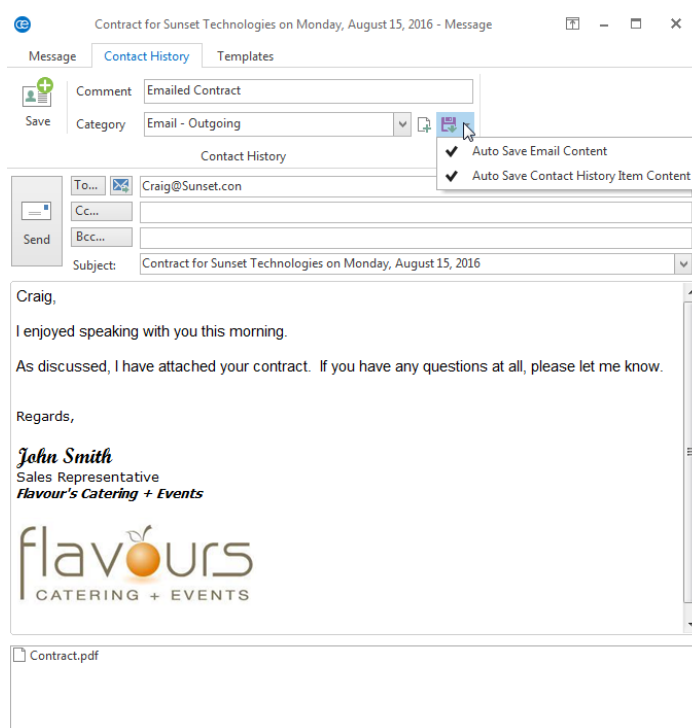
**Note:** Click the **Save** button, located on the upper left-hand side of the window, if you would like to save

the comment as a Contact History item; click the **Save Email Content** button  if you would like to save the e-mail content of this e-mail message only (without logging a contact history action).

14. Click on the **Message** tab, located to the left of the **Contact History** tab, and then click the **Save Window Settings** button  in order to retain the settings you established in Step 13.

15. When finished, click **Send**.

**Result:** The e-mail is sent through your e-mail program (often Outlook), and any files/prints you have attached are exported.

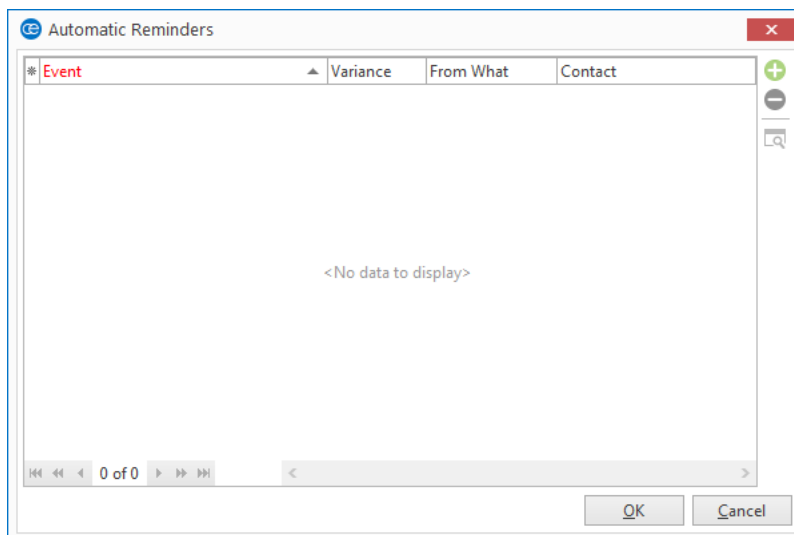


## Creating Automatic Reminders from Event Manager

If you own the Contact Manager add-in, you can create automatic reminders that will pop up on your screen in Event Manager on a certain date to remind you to complete a task. These reminders can be linked to event dates, booked dates, or revised dates.

### Creating a New Automatic Reminder from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** sidebar group located on the left-hand side of your screen.
2. Click the **Administration** ribbon tab at the top of the screen.
3. Click the **Options** button and select **Automatic Reminders Setup**.  
**Result:** *The Automatic Reminders window opens.*



4. Click the **Add New Auto-Reminder** button , located at the top right-hand side of the window.  
**Result:** *The Set Auto Reminder window opens.*

**Set Auto Reminder**

**Setup**

Create a new reminder when the following event occurs  
 A New Event Is Booked

Set the reminder date for ... 1 Day(s)

... Before the Event Date

Set the reminder for ... 15 minutes

... prior to the time of 01:24 PM

**Reminder Detail**

Subject: Auto Reminder

Location:

Label: ☐ None

Category:

Contact: Booking Contact

Options: ☒ Confirm when created  
☒ Specific user: Jo Ann Mulnix

**Message**

OK Cancel

- Click the down arrow at the right of the first field on this screen and choose an action to trigger the creation of the reminder.

Create a new reminder when the following event occurs:

- A New Event is Booked
  - An Existing Event is Changed
  - A Deposit is Scheduled
- Click the days, weeks, or months drop-down list to determine the span of time the program should use to set the automatic reminder (e.g., a certain number of days, weeks, or months before or after the event date, booked date, or revised date).
  - Enter a number of days, weeks, or months, and select a date to have the automatic reminder linked to.
  - Click the down arrow to indicate whether the number of days you selected is to occur before or after the reminder date and time.

9. Click the down arrow to indicate whether the reminder pertains to Event Date, Booked Date, or Revised Date.
10. **[Optional]** Click the down arrow next to **Set the reminder for**, and select the number of minutes or hours prior to the reminder time you would like the reminder to display.  
***Note:** This entry will not control what time you see this reminder; it will merely display to inform you what time the reminder is due to be responded to.*
11. **[Optional]** Complete the following information in the Reminder Detail fields.
  - **Subject** -- Type a Subject for this auto-reminder, or click the down arrow to the right of the field to select items from a drop-down quickpick list. (See Unit 5 for information about managing your quickpick lists.)
  - **Location** -- Type a Location to associate with this reminder, or select from the drop-down quickpick list.
  - **Label** -- Optionally assign a Label to the reminder (Business, Personal, etc.), by selecting the desired label from the drop-down list of options.
  - **Category** -- Type directly into this field or click the down arrow at the right of the field and choose from the corresponding quickpick list. Category examples might include "Urgent," "Follow-up," etc.
  - **Contact** -- This is the contact person at the company to which this auto-reminder pertains. You can accept the default or click the down arrow to the right of the field and choose another contact (or edit the existing one).
12. **[Optional]** Click into the checkbox next to **Confirm when created** to enable these settings.  
***Note:** "Confirm when created" sets the program to prompt you whenever this automatic reminder is created for an event.*
13. **[Optional]** Click into the checkbox next to **Specific User** and click the down arrow to assign this automatic reminder to a particular user.  
***Note:** If this option is not selected, the automatic reminder will be assigned to whichever user triggers it; meaning the user who adds or modifies the event and causes the reminder to be created.*
14. Type the text of your reminder into the **Message** box, or insert merge fields to dynamically merge information into the reminder. (See the section below.)
15. When finished, click **OK**.

## Retrieving Linked Reminder Items into a Manager

You can view a reminder and then retrieve that reminder into a Manager, where you can address the task the reminder has prompted you to complete.

### Retrieving Linked Reminders into a Manager

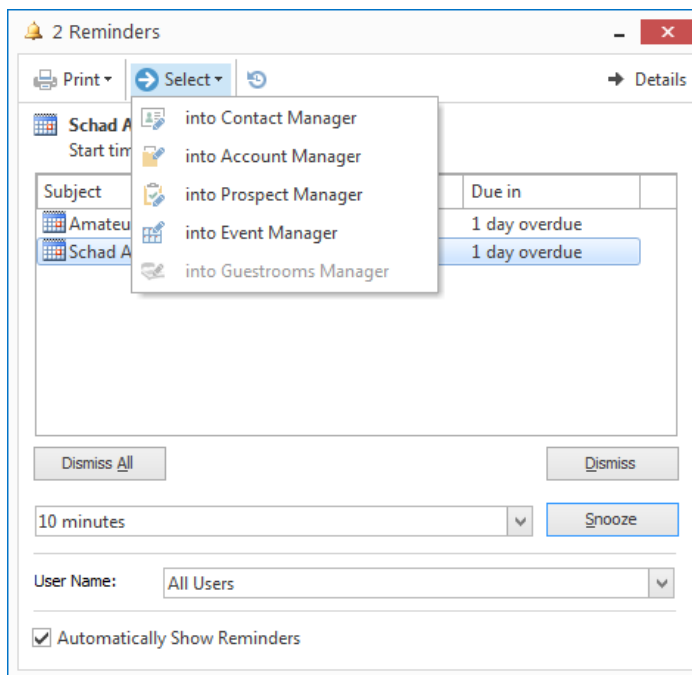
1. Click the **Tools** sidebar group on the left-hand side of your screen.

2. Click the **Active Reminders** button.

**Result:** The Reminder window opens.

**Note:** If you are logged in as an Administrator, you can elect to see reminders for all users or for individual users by clicking the down arrow to the right of the User Name field.

3. Click the **Select** button at the top left-hand side of the window.



4. Choose which Manager you would like to associate with the reminder. Your list of options will depend upon which modules you own.

**Note:** You will be prompted to confirm your choice:

- **Into Contact Manager** -- This option will open Contact Manager, and positions you on the account associated with this reminder.
- **Into Account Manager** -- This option will open Account Manager on the account associated with this reminder.
- **Into Prospect Manager** -- This option opens Prospect Manager, and positions you on the record associated with this reminder.

- **Into Event Manager** -- This option will open Event Manager on the event that this reminder is linked to.  
***Note:** If this option is not available when you click **Select**, this means that the highlighted (selected) reminder is not linked to an event.*

- **Into Guestrooms Manager** -- This option will open Guestrooms Manager on the account that this reminder is linked to.  
***Note:** If this option is not available when you click **Select**, this means that the highlighted (selected) reminder is not linked to an existing guestrooms booking.*




5. Click **OK** at the confirmation prompt.

***Result:** The reminder is retrieved into the Manager you selected.*


# Viewing Contact History and Reminders in Event Manager



Caterease Contact Manager lets you keep track of all contact you have had with your clients, including reminders and contact history notes. Contact Manager features are interwoven throughout Caterease, meaning you are able to view your contact history items directly from Event Manager or Account Manager, without having to open Contact Manager.

## Viewing Contact History from Event Manager






1. Access Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar group, located on the left-hand side of your screen.
2. Search for and select an account.
3. Click the **Reminders & Contact History** button , located at the bottom of the screen, to access the contact history information.  
**Result:** The Contact History & Reminders window opens.  
**Note:** You may also access this feature from the **Tools** button, located in the **Home** ribbon tab at the top of your screen.
4. Click the **Contact History** tab.
5. Click on the contact history item you would like to view.  
**Note:** Click into the **Current Event Only** checkbox at the top of the window if you only want to see contact history related to the current event.
6. Click the **View Comment** button , located on the right-hand side of the screen.  
**Result:** The contact history note text will display below its date and time details.  
**Note:** Click the **View Contact History Comments** button again and the note will close.
7. **[Optional]** Click the **Quick Column Customizing** button  at the top left corner of the grid view and check off other columns of details to be displayed in the grid.  
**Result:** Any selected column is instantly displayed in the grid.

## Viewing Reminders from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar group, located on the left-hand side of your screen.
2. Search for and select an account.
3. Click the **Reminders & Contact History** button , located at the bottom left-hand side of your screen, to access the reminder information.  
**Result:** The Contact History & Reminders window opens.  
**Note:** You may also access this feature from the **Tools** button, located in the **Home** ribbon tab at the top of your screen.

4. Click the **Reminders** tab.
5. Click on the reminder you would like to view.  
**Note:** Click into the **Current Event Only** checkbox at the top of the window if you only want to see reminders related to the current event.
6. Click the **View Reminder Action Items** button , located on the right-hand side of the screen.  
**Result:** The reminder note text will display below its date and time details.  
**Note:** Click the **View Reminder Action Items** button again and the note will close.
7. [Optional] Click the **Quick Column Customizing** button  at the top left corner of the grid view and check off other columns of details to be displayed in the grid.  
**Result:** Any selected column is instantly displayed in the grid.

## Viewing Sent Emails from Event Manager

1. Access Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar group, located on the left-hand side of your screen.
2. Search for and select an account.
3. Click the **Reminders & Contact History** button , located at the bottom left-hand side of your screen, to access the e-mail information.  
**Result:** The Contact History & Reminders window opens.  
**Note:** You may also access this feature from the **Tools** button, located in the **Home** ribbon tab at the top of your screen.
4. Click the **Emails Sent** tab.
5. Click on the e-mail you would like to view/edit.  
**Note:** Click into the **Current Event Only** checkbox at the top of the window if you only want to see e-mails related to the current event.
6. Click the **View Email** button , located on the right-hand side of the window, to view the e-mail that was sent.  
**Result:** The Email window opens.  
**Note:** Use the zoom-in/zoom-out buttons to increase or decrease the size of the e-mail, or click the down arrow to the right of the Percentage field to select a zoom-in/zoom-out percentage.
7. Click the **Preview Email Comments** button , located on the right-hand side of the screen.  
**Result:** The e-mail note text will display below its date and time details.  
**Note:** Click the **Preview E-mail Comment** button  again and the note will close.
8. [Optional] Click the **Quick Column Customizing** button  at the top left corner of the grid view and check off other columns of details to be displayed in the grid.  
**Result:** Any selected column is instantly displayed in the grid. The available fields are described below.

Field	Description
<b>Date</b>	The date the contact history item was performed.
<b>Subject</b>	The subject of the contact history item.
<b>Sent To</b>	The recipient's e-mail address.
<b>CC</b>	The e-mail of The person who was carbon copied (Cc'd) in the e-mail.
<b>Attachments</b>	The attachment name and type of file.
<b>User</b>	The person who sent the e-mail.
<b>Category</b>	The category of the e-mail; examples might include follow-up, confirmation, etc.
<b>Event #</b>	The event number the e-mail is linked to.

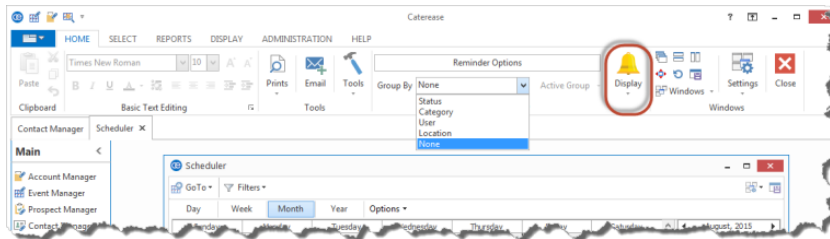
## Viewing Reminders in the Scheduler

You can see reminders in a day-at-a-glance, a week-at-a-glance, a custom work-week-at-a-glance, or a month-at-a-glance display, just like you would in Microsoft Outlook.

### Viewing Reminders in the Scheduler

1. Click the **Scheduler** button from the **Main** sidebar group, located on the left-hand side of your screen.
2. Click the **Display** button, located on the **Home** ribbon tab, and choose **Reminders**.
3. **[Optional]** Click the down arrow next to **Group By**, at the top left of the window, and choose **Status**, **User**, **Category**, **Location**, or **None**.

**Note:** Administrators are able to view reminders for all users. If you are logged in as a specific user, only your reminders will appear in the calendar display.



4. **[Optional]** Export or synchronize your reminders. See the topic below.

## Unit 19: Using the Query Tools to Track Business

In this section, you will learn:

- Tracking Current Events
- Customizing Results Grids
  - Grouping Grid Data
- Saving and Loading Custom Grid Views
  - Filtering Grid Data
- Saving and Loading Custom Grid Filters
- Saving and Loading Custom Grid Layouts
  - Using the Find Panel
  - Using the Preview Field
- Exporting Grid Data
- Printing Grids
- Generating Batch Emails



# Tracking Current Events

Using the powerful Current Events tool, you can quickly and easily track all upcoming events - or only those in the next week, two weeks, month, etc. Results are displayed in a detail grid, which can then be customized to show any information you want and then printed or even exported in a variety of formats.

## Tracking Your Current Events

1. Click the **Tools** sidebar group, located on the left-hand side of the screen.
2. Click the **Current Events** button.  
**Result:** The Current Events Base Query window opens.

**Tip:** Click into the checkbox labeled **Don't Show Window** at the bottom left of the tool to automatically display your grid results. You can quickly edit your query criteria at any time.

3. Click the down arrow to the right of the Days Out field and choose how many days out you would like your search to go.
4. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.  
**Note:** Placing a check in a box causes the tool to exclude events with that status from your results.
5. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.
6. When finished, click **OK**.  
**Result:** The events matching your criteria are listed in a detail grid.

**Tip:** Click the **SQL** button, located on the upper right-hand side of the window, to edit your query criteria.

## Unit 19: Using the Query Tools to Track Business

Current Events Query

Custom: Views Filters Layout Chart By Business Type

Filter

Filter AND applies to the main query

Click here to add a new condition


(Total Current Events)

Results

Event #	Event Date	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total
E00454	5/18/2016	Tentative	Ladtech	Kathy Wilson	\$713.75	\$98.20	\$49.97	\$861.92
E00463	5/18/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$1,215.80	\$194.53	\$85.11	\$1,495.44
E00389	5/21/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$663.50	\$106.16	\$46.45	\$816.11
E00356	5/24/2016	Definite	Ducks Unlimited	Roxanne M. Mc	\$3,436.65	\$513.86	\$230.07	\$4,180.58
E00005	5/24/2016	Tentative	Greg's Soccer Team	Kathy Wilson	\$1,612.95	\$258.07	\$112.91	\$1,983.93
E00466	5/24/2016	Tentative	Schad Associates	John Smith	\$0.00	\$0.00	\$0.00	\$0.00
E00226	5/25/2016	Definite	Lenox/Uchtman Wedding	Roxanne M. Mc	\$13,087.48	\$2,093.99	\$916.13	\$16,097.60
E00459	5/27/2016	Tentative	Diebold Co.	John Smith	\$697.50	\$111.60	\$48.83	\$857.93
E00402	5/28/2016	Tentative	Wiggins, Goodlette & Davis P.	John Smith	\$294.50	\$47.12	\$20.62	\$362.24
E00003	5/29/2016	Tentative	Greg's Soccer Team	Kathy Wilson	\$1,697.95	\$271.67	\$118.87	\$2,088.49
E00380	6/3/2016	Tentative	Lebron Corporation	Roxanne M. Mc	\$5,620.00	\$899.20	\$393.40	\$6,912.60
E00382	6/4/2016	Tentative	Naples City Police Department	Jo Ann Mulnix	\$1,138.75	\$182.20	\$79.72	\$1,400.67
E00390	6/11/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
E00464	6/12/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05
E00384	6/18/2016	Definite	Natasha White	Roxanne M. Mc	\$5,455.00	\$872.80	\$381.85	\$6,709.65
E00403	6/18/2016	Tentative	Wiggins, Goodlette & Davis P.	John Smith	\$294.50	\$47.12	\$20.62	\$362.24
E00417	6/18/2016	Tentative	David Ames & Associates	Roxanne M. Mc	\$514.25	\$67.08	\$30.75	\$612.08
E00418	6/18/2016	Tentative	Diebold Corporation	Roxanne M. Mc	\$2,777.00	\$411.73	\$188.46	\$3,377.19

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## Customizing Grid Columns

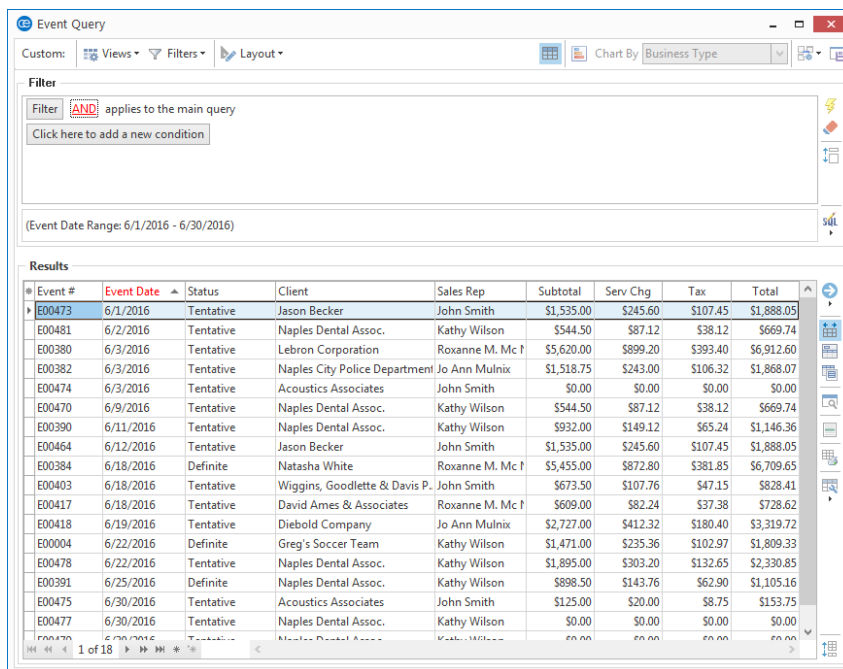
1. At the top left corner of a detail grid, (bottom pane) click the **Quick Column Customizing** button .

**Result:** A drop-down list of optional columns appears.

2. Click into 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 , located on the right-hand side of the grid, is generally enabled by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.



Event #	Event Date	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total
E00473	6/1/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05
E00481	6/2/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$544.50	\$87.12	\$38.12	\$669.74
E00380	6/3/2016	Tentative	Lebron Corporation	Roxanne M. Mc T	\$5,620.00	\$899.20	\$393.40	\$6,912.60
E00382	6/3/2016	Tentative	Naples City Police Department	Jo Ann Mulnix	\$1,518.75	\$243.00	\$106.32	\$1,868.07
E00474	6/3/2016	Tentative	Acoustics Associates	John Smith	\$0.00	\$0.00	\$0.00	\$0.00
E00470	6/9/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$544.50	\$87.12	\$38.12	\$669.74
E00390	6/11/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$932.00	\$149.12	\$65.24	\$1,146.36
E00464	6/12/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05
E00384	6/18/2016	Definite	Natasha White	Roxanne M. Mc T	\$5,455.00	\$872.80	\$381.85	\$6,709.65
E00403	6/18/2016	Tentative	Wiggins, Goodlette & Davis P.	John Smith	\$673.50	\$107.76	\$47.15	\$828.41
E00417	6/18/2016	Tentative	David Ames & Associates	Roxanne M. Mc T	\$609.00	\$82.24	\$37.38	\$728.62
E00418	6/19/2016	Tentative	Diebold Company	Jo Ann Mulnix	\$2,727.00	\$412.32	\$180.40	\$3,319.72
E00004	6/22/2016	Definite	Greg's Soccer Team	Kathy Wilson	\$1,471.00	\$235.36	\$102.97	\$1,809.33
E00478	6/22/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$1,895.00	\$303.20	\$132.65	\$2,330.85
E00391	6/25/2016	Definite	Naples Dental Assoc.	Kathy Wilson	\$898.50	\$143.76	\$62.90	\$1,105.16
E00475	6/30/2016	Tentative	Acoustics Associates	John Smith	\$125.00	\$20.00	\$8.75	\$153.75
E00477	6/30/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$0.00	\$0.00	\$0.00	\$0.00

3. [Optional] Hold your left mouse button down on a column title in the customization window and drag up and down to reposition that column in the list of customization options.

**Note:** You can also drag column headings left and right in the grid itself.

4. Use these details to sort, group, or filter the grid data as described in the topics below.

## Sorting Grid Data

1. Click on the heading of a column in a grid to sort by that detail.

**Result:** Records are sorted in ascending order by that detail.

2. [Optional] Click on the same column heading again to sort by that detail in descending order.

3. [Optional] Hold the [Shift] key down on your keyboard and click a second column heading to sort by an additional detail.

**Result:** Records are sorted initially by the first detail you selected, then within that group they are sorted by the second detail.

**Tip:** All grids (beginning with Caterease Version 16) allow for sorting in ascending and descending order.

## Grouping Grid Data

1. From a results grid, click the **Group By Box** button  , located at the right of the detail grid.

**Result:** A small pane appears across the top of the detail grid with the words "Drag a column heading here to group by that column."

2. Hold your left mouse button down on the heading of any column and drag that heading into the pane at the top of the grid.

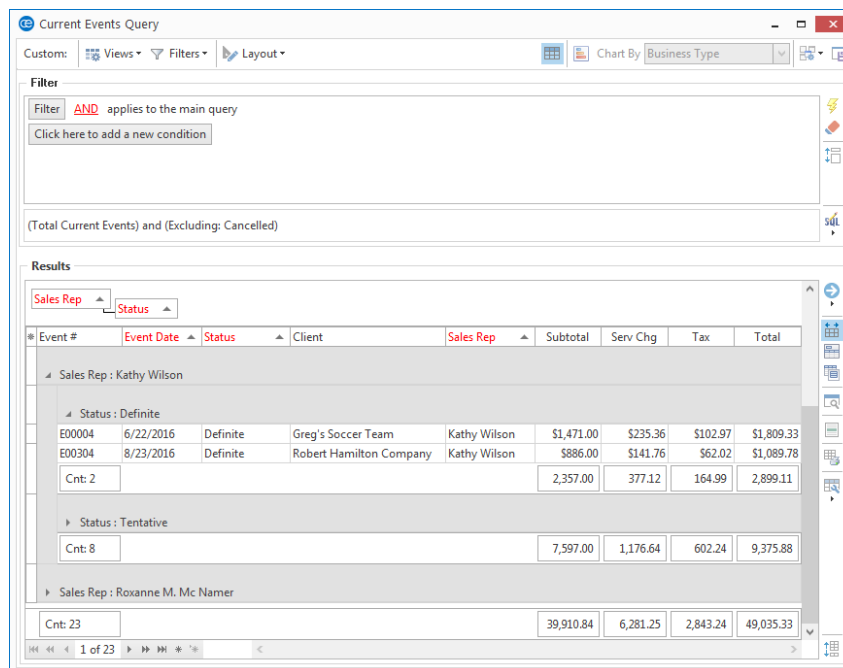
**Result:** Grid data is now separated into groups based on your selection.

**Note:** As an alternative to Steps 1 and 2, you can right-click over a column heading and choose **Group By This Field** (not available in Express).

3. Repeat Steps 1 and 2 to create groups within groups.

**Result:** Records are grouped initially by the first detail you selected, then within that group they are separated by the second detail.

**Tip:** You can also use the "Group By This Field" option to separate records into groups by merely clicking on a column heading with your right mouse button and choosing **Group By This Field**.



Event #	Event Date	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total
<b>Sales Rep : Kathy Wilson</b>								
<b>Status : Definite</b>								
E00004	6/22/2016	Definite	Greg's Soccer Team	Kathy Wilson	\$1,471.00	\$235.36	\$102.97	\$1,809.33
E00304	8/23/2016	Definite	Robert Hamilton Company	Kathy Wilson	\$886.00	\$141.76	\$62.02	\$1,089.78
<b>Cnt: 2</b>					<b>2,357.00</b>	<b>377.12</b>	<b>164.99</b>	<b>2,899.11</b>
<b>Status : Tentative</b>								
<b>Cnt: 8</b>					<b>7,597.00</b>	<b>1,176.64</b>	<b>602.24</b>	<b>9,375.88</b>
<b>Sales Rep : Roxanne M. Mc Namer</b>								
<b>Cnt: 23</b>					<b>39,910.84</b>	<b>6,281.25</b>	<b>2,843.24</b>	<b>49,035.33</b>

4. Click the expand button to the left of each group in the grid to display the records in that group.

**Result:** The group opens and displays its records, including optional footers (group subtotals), where applicable.

**Note:** If footers are not visible for each group, click the **Grid Tools** button  , located on the right-hand side of the window, and choose **Show Footer**.

5. [Optional] Right-click into the footer of any column in the grid, and choose to show a total "Count" for that column, or for financial columns choose to show the sum of all values, the minimum value, the maximum value, or the average value.

6. Click the triangle to the left of any expanded group to collapse that group and hide its contents.

**Result:** The group closes and hides its records.

**Note:** As an option, you can right-click within a grid and select **Expand All** or **Collapse All** to open or close all groups.

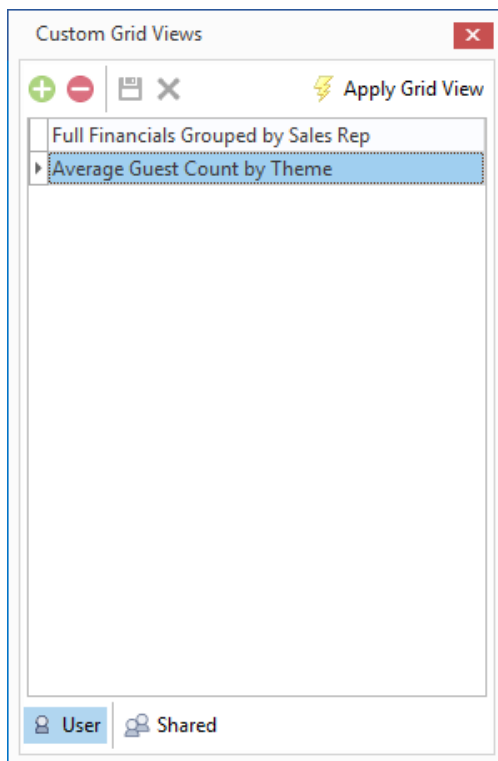
7. Remove groups by dragging column headings from the "Group By Box" pane back into position among other headings in the grid.



**Note:** If you have grouped by multiple details, each group heading must be removed individually.

## Saving/Loading Custom Grid Views

Once you have established the grid you want (the columns are displayed the way you want, sorted the way you want, grouped the way you want, etc.), you can save that custom grid view for future use. Perhaps every month you're going to want to look at your financial information grouped by sales representative, for example. Create this grid view once, then save it to be retrieved every month, with just the click of a button. Grid views can be saved locally (meaning they will only be available under your log-in credentials) or shared across all Caterease users on your network). Not available in the Express version.

1. Establish a custom grid view, as outlined previously.
2. Click the **Views** button, located at the top left-hand side of the results grid display.
3. Choose **Custom**.  
***Result:** The Custom Grid Views window opens.*
4. **[Optional]** Click the **Shared** button at the bottom of the pop-up window if you want this custom filter to be shared with other Caterease users.  
***Note:** As a default, the **User** button is selected, meaning this new filter will only be available for your use.*
5. Click the **Add Grid View** button.  
***Result:** A new blank line is added to the list.*  
***Note:** You can update an existing grid view by right-clicking on its name in the list and choosing **Apply Grid View**.*
6. Type a name for your new grid view into the field provided.



7. Click the **Save Current Grid View** button  .
8. When finished, click the  at the top right of the Custom Grid Views window to close it.
9. Switch among saved grid filters by clicking the **Views** button at the top of the grid and selecting the name of a previously saved grid view.


## Filtering Grid Data

1. Float your mouse cursor over any column heading in a grid (without clicking).  
**Result:** A down arrow appears at the right of the column heading.
2. Click the filter icon at the right of the column heading.  
**Result:** A drop-down list of options appears.
3. Click into the checkbox next to any option in the drop-down list to filter by that detail.  
**Result:** The grid updates to show only records matching your selection.  
**Note:** At the bottom of the grid window, the filter(s) you establish are being stored temporarily while the grid remains open.


**Tip:** You can establish custom filters by clicking **Custom** in Step 3, above, and then choosing from comparison phrases such as "equals," "does not equal," "less than," "like," etc. When using "like" to filter for similar records, use "\_" as a wildcard to represent any single character, and "%" to represent any series of characters. Use the conjunctions "And" and "Or" to optionally establish a second custom condition.

The screenshot shows the 'Current Events Query' window. The 'Filter' section at the top indicates that the filter 'Sales Rep equals Kathy Wilson' is applied to the main query. Below this, the 'Results' section displays a table of events. The 'Sales Rep' column has a drop-down menu open, showing a list of sales representatives: (All), (Custom...), Jo Ann Mulnix, John Smith, Kathy Wilson (selected), and Roxanne M. Mc Namer. The table lists events with columns for Event #, Event Date, Status, Client, Sales Rep, Subtotal, Serv Chg, Tax, and Total. At the bottom, the status bar shows '(Sales Rep = Kathy Wilson)' and a 'Customize...' button.

Event #	Event Date	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total
E00470	6/9/2016	Tentative	Naples Dental Assoc	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
E00390	6/11/2016	Tentative	Naples Dental Assoc	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
E00004	6/22/2016	Definite	Greg's Soccer Team	John Smith	\$1,471.00	\$235.36	\$102.97	\$1,809.33
E00391	6/25/2016	Tentative	Naples Dental Assoc	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
E00336	7/19/2016	Tentative	Ladtech	Kathy Wilson	\$892.50	\$126.80	\$62.48	\$1,081.78
E00198	7/26/2016	Tentative	USA Cup	Kathy Wilson	\$2,407.50	\$382.32	\$238.95	\$3,028.77
E00338	8/6/2016	Tentative	Microtech Hearing Inst.	Kathy Wilson	\$324.50	\$31.92	\$22.72	\$379.14
E00304	8/23/2016	Definite	Robert Hamilton Company	Kathy Wilson	\$886.00	\$141.76	\$62.02	\$1,089.78

4. Repeat Steps 1-3 to filter by additional details as desired.
5. Restore previous filters from this grid session by clicking the filter icon to the right of the filter details (bottom left corner of the grid) and choosing a different filter from the list.  
**Note:** This list saves filters you have established in this one session of the grid only. See "Saving/Loading Custom Filters," for information on creating a list of saved filters for frequent use.
6. [Optional] Remove the current filter by clicking the X to the left of the filter name or by clicking the **Clear Query Criteria & Results** button  , located on the upper right-hand side of the window.

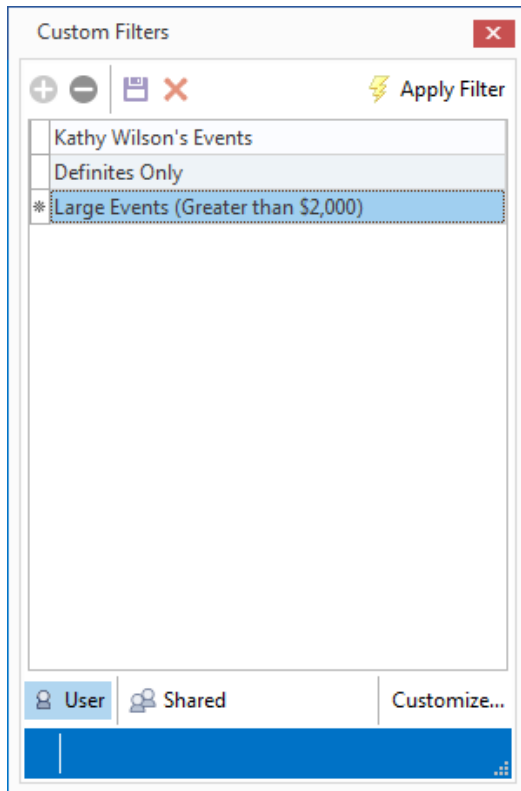
## Customizing Conditions in a Filter

1. Generate a query, such as an Event Query (**Queries** sidebar > **Event Query**).
2. Click on the **Click here to add a new condition** button to add a new condition (search criterion).  
**Result:** A condition will be added, stating "**Event # equals <empty>**".  
**Note:** To remove a condition added by mistake, click the ellipsis button to the left of the condition and select **Remove Condition**.
3. Click on the words **Event #** in the condition and choose any condition from the drop-down list. This will be the first condition you search by.
4. Click the **equals**, next to your condition, and choose any comparison option. Comparisons might say "Like," "Between," "In," etc.
5. Click **<empty>** in the condition and choose a value for the condition to be compared to.  
**Note:** These lists are dynamic. If you are searching by Event Theme, then this list will reflect your quick-pick list of themes. If you are searching by date, this list will reflect days or date ranges. If you are searching by financial fields, a window in which you can type specific values will open.
6. Add as many query conditions as desired by following Steps 2 - 5, above.  
**Note:** You can query records that match one condition or another or records that do not match any conditions you set. )
7. When finished adding conditions, click the **Perform Query** button .  
**Result:** Your query results will display in a grid in the lower pane of your screen.

## Saving/Loading Custom Filters

1. Filter the grid data as described above.
2. Click the **Filters** button at the top of the grid window.
3. Click **Custom**.

**Result:** *The Custom Filters window opens.*



4. **[Optional]** Click the **Shared** button at the bottom of the pop-up window if you want this custom filter to be shared with other Caterease users.

**Note:** *As a default, the **User** button is selected, meaning this new filter will only be available for your use.*

5. Click the **Add Filter** button  at the top left of the pop-up window.

**Result:** *A new blank line is added to the list.*

**Note:** *You can update an existing filter by right-clicking on its name in the list and choosing **Apply Filter**.*

6. Type a name for your new filter.

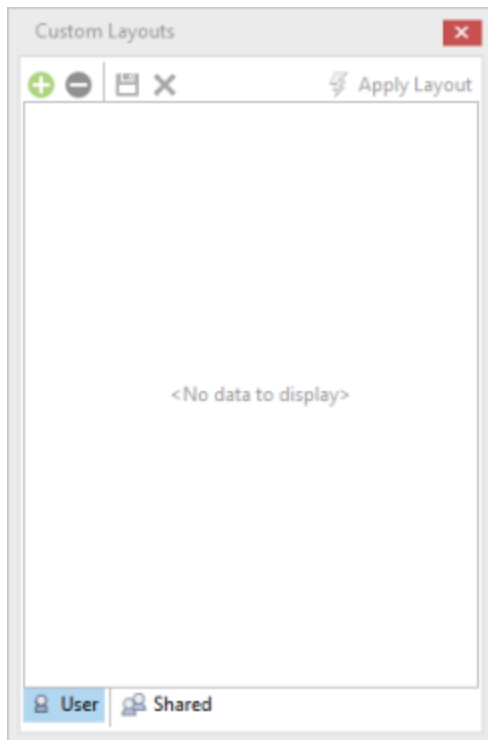
7. Click the **Save Current Filter** button  .

8. When finished, click the  at the top right of the Custom Filters window to close it.




9. Switch among saved grid filters by clicking the **Filters** button at the top of the grid and selecting the name of a previously saved filter.

## Saving Custom Layouts

1. Customize the results grid based on the topics above.
2. Click the **Layout** button at the top left of grid and choose **Custom**.  
**Result:** The Custom Layouts window opens.



**Tip:** Select a custom layout on-the-fly by clicking the **Layouts** button at the top of the window and selecting a layout name. (Multiple layouts are not available in Express). If you want to retrieve custom window size and position settings, custom grid views or custom tool bar settings with your saved layout, select those options first (**Layouts** > **Include**) before selecting your custom layout. If you want this new layout to serve as the default look for the program, you must click the **Save Window Settings** button at the top right of the window. If you want this to be the new default look for all users on your network, click the **Settings** button at the top right and choose **Shared** > **Save Current Window**.

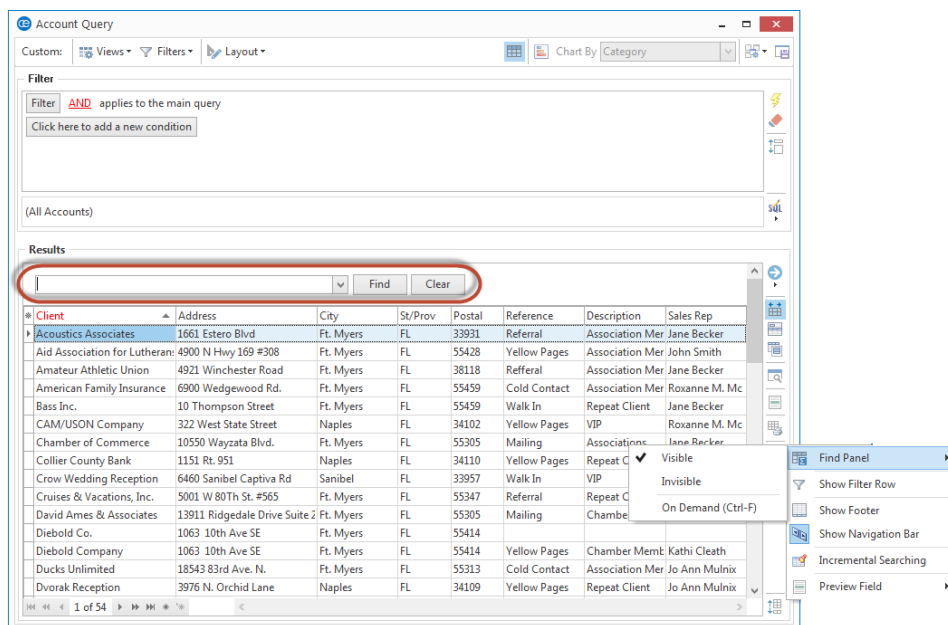
3. [Optional] Click the **Shared** button at the bottom left of the window if you want your new layout to be available to all users on your Caterease network.  
**Note:** *User layouts are only available to you as a user (from any computer).*
4. Click the **Add Layout** button  , at the top left of the window.  
**Result:** A new line is added to the window with the default name of "New Layout."  
**Note:** You can update an existing layout on the list to show your current screen display by right-clicking on the layout name and choosing **Apply Layout**.
5. Type a name for new layout, and click the **Save Current Layout** button  .
6. Click the  at the top right of the Custom Layout window to close it.

## Using the Find Panel

All queries now have an optional Find panel (Available in Version 16, Professional Version).

**Tip:** Prior to utilizing the Find panel, ensure you have customized your grid to display the desired columns, as only visible fields can be searched.

1. Click the **Grid Tools** button , located on the right-hand side of the detail grid.



2. Choose **Visible** or **On Demand**.

**Note:** "Invisible" is the default.

- If **"Visible"** is selected, the Find panel will display on your screen.
- If **"On Demand"** is selected, the panel will become visible when the **[Ctrl]** key and the **F** key are pressed simultaneously.

3. Simply begin typing the name of item you are searching for into the field provided and you will be incrementally scrolled to possible matches.

## Using the Preview Field

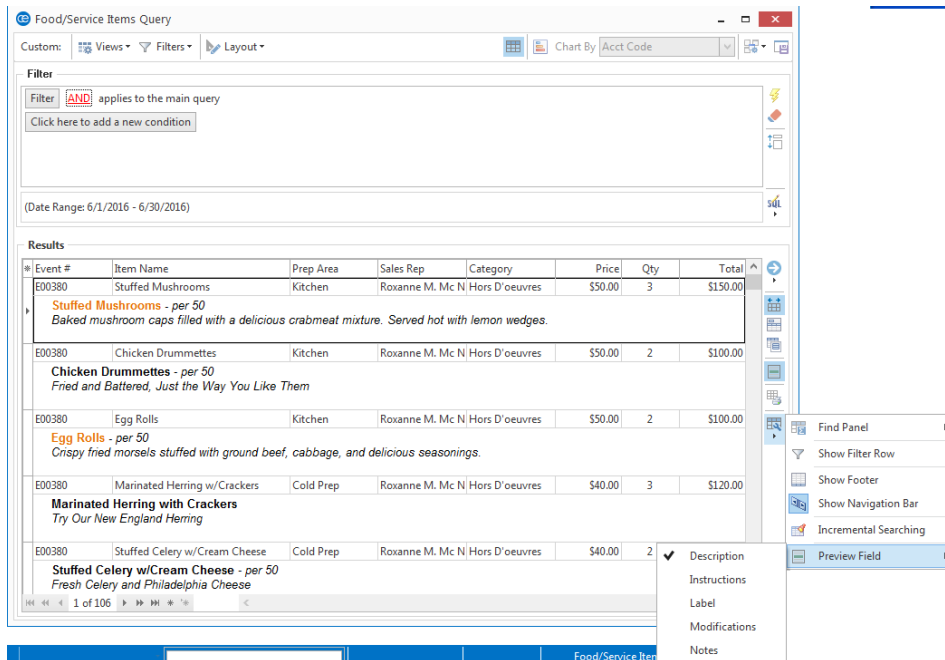
You can choose any text field as an optional Preview Field (for Notes, Comments, Allergy Information, Modifications, for example), in any of your query grids. (Available in Version 16, Professional Version).

1. Click the **Grid Tools** button , located on the right-hand side of the detail grid.

2. Click the **Preview Field** button to expand your list of available fields.

3. Click on the desired option.

**Result:** The grid will instantly display the text associated with the field you specified.



The screenshot shows the 'Food/Service Items Query' window. The 'Filter' section is empty. The 'Results' section displays a table with columns: Event #, Item Name, Prep Area, Sales Rep, Category, Price, Qty, and Total. The table contains five rows of food items. The 'Preview Field' menu is open on the right side of the window, showing options: Find Panel, Show Filter Row, Show Footer, Show Navigation Bar, Incremental Searching, and Preview Field (which is highlighted). The 'Preview Field' option is expanded, showing a list of available fields: Description, Instructions, Label, Modifications, and Notes. The 'Description' field is selected, and the corresponding descriptions are displayed in the 'Preview Field' column of the table.

Event #	Item Name	Prep Area	Sales Rep	Category	Price	Qty	Total	Preview Field
E00380	Stuffed Mushrooms	Kitchen	Roxanne M. Mc N	Hors D'oeuvres	\$50.00	3	\$150.00	Stuffed Mushrooms - per 50 Baked mushroom caps filled with a delicious crabmeat mixture. Served hot with lemon wedges.
E00380	Chicken Drummettes	Kitchen	Roxanne M. Mc N	Hors D'oeuvres	\$50.00	2	\$100.00	Chicken Drummettes - per 50 Fried and Battered, Just the Way You Like Them
E00380	Egg Rolls	Kitchen	Roxanne M. Mc N	Hors D'oeuvres	\$50.00	2	\$100.00	Egg Rolls - per 50 Crispy fried morsels stuffed with ground beef, cabbage, and delicious seasonings.
E00380	Marinated Herring w/Crackers	Cold Prep	Roxanne M. Mc N	Hors D'oeuvres	\$40.00	3	\$120.00	Marinated Herring with Crackers Try Our New England Herring
E00380	Stuffed Celery w/Cream Cheese	Cold Prep	Roxanne M. Mc N	Hors D'oeuvres	\$40.00	2	\$80.00	Stuffed Celery w/Cream Cheese - per 50 Fresh Celery and Philadelphia Cheese

## Exporting Grid Data

1. Click your right mouse button anywhere within a results grid.

**Result:** A pop-up menu appears.

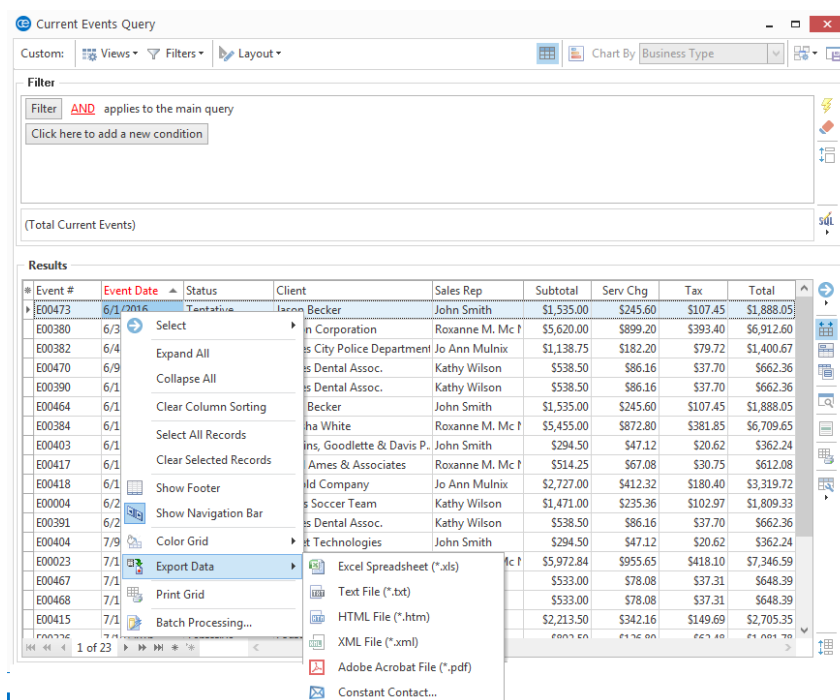
2. Select **Export Data**.

**Result:** A sub-menu appears.

3. Choose a format for your export: Excel Spreadsheet, Text File, HTML File, XML File or Adobe Acrobat File (.pdf).

**Result:** A window appears for you to type a name for your export file.

**Note:** Certain grids also allow export to Constant Contact or Exact Target (if you own the interface with those services).



4. Enter a name for the exported file. Note the directory in which the file is being saved.


**Note:** You can easily change the export directory by clicking the down arrow next to the Save In field at the top of the window and selecting another directory.

5. Click **Save**.

**Result:** A prompt will appear, and your export file has been created.

**Note:** If you have the Professional version of Caterease, this prompt will offer to open your export file for you automatically. If you have the Standard or Express version, you will need to open a third-party application on your own and seek out the export file.

## Printing Grids

1. Customize the detail grid as described in topics above.
2. Click the **Print Grid** button , located on the right-hand side of the grid.  
**Result:** A preview of the grid print displays.

**Tip:** You can optionally scale the size of text on your grid print to have it better fit on the page.

Current Events Query - Print Preview

Preview

Print Export To PDF Page Setup... Format Background Exit to Page Width Email Whole Page Two Pages Pages Zoom Navigation Thumbnails View Settings Windows

Margins Left: 0.5 in Top: 0.5 in Right: 0.5 in Bottom: 0.5 in Header: 0.2 in Footer: 0.2 in

Full Financials Grouped by Sales Rep								
Event #	Event Date	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total
Sales Rep: Jo Ann Mulnix								
E00008	8/27/2016	Tentative	Horizon Business Services	Jo Ann Mulnix	\$3,653.00	\$584.48	\$255.71	\$4,493.19
E00382	6/4/2016	Tentative	Naples City Police Departm	Jo Ann Mulnix	\$1,138.75	\$182.20	\$79.72	\$1,400.67
E00418	6/19/2016	Tentative	Diebold Company	Jo Ann Mulnix	\$2,727.00	\$412.32	\$180.40	\$3,319.72
Cnt: 3					7,518.75	1,179.00	\$515.83	9,213.58
Sales Rep: John Smith								
E00393	7/30/2016	Tentative	Wiggins, Goodlette & Davis	John Smith	\$294.50	\$47.12	\$20.62	\$362.24
E00403	6/18/2016	Tentative	Wiggins, Goodlette & Davis	John Smith	\$294.50	\$47.12	\$20.62	\$362.24
E00404	7/9/2016	Tentative	Sunset Technologies	John Smith	\$294.50	\$47.12	\$20.62	\$362.24
E00415	7/18/2016	Tentative	Cruises & Vacations, Inc.	John Smith	\$2,213.50	\$342.16	\$149.69	\$2,705.35
E00464	6/12/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05
E00467	7/14/2016	Tentative	Amateur Athletic Union	John Smith	\$533.00	\$78.08	\$37.31	\$648.39
E00468	7/14/2016	Tentative	Amateur Athletic Union	John Smith	\$533.00	\$78.08	\$37.31	\$648.39
E00473	6/1/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05
Cnt: 8					7,233.00	1,130.88	\$501.07	8,864.95
Sales Rep: Kathy Wilson								
E00336	7/19/2016	Tentative	Ladtech	Kathy Wilson	\$892.50	\$126.80	\$62.48	\$1,081.78
E00338	8/6/2016	Tentative	Microtech Hearing Inst.	Kathy Wilson	\$324.50	\$31.92	\$22.72	\$379.14
E00304	8/23/2016	Definite	Robert Hamilton Company	Kathy Wilson	\$886.00	\$141.76	\$62.02	\$1,089.78
E00198	7/26/2016	Tentative	USA Cup	Kathy Wilson	\$2,407.50	\$382.32	\$238.95	\$3,028.77
E00004	6/22/2016	Definite	Greg's Soccer Team	Kathy Wilson	\$1,471.00	\$235.36	\$102.97	\$1,809.33
E00390	6/11/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
E00391	6/25/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
E00470	6/9/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36
Cnt: 8					7,597.00	1,176.64	\$602.24	9,375.88

Page: 1 Of 1 Pages Paper Size: 8.5 in x 11 in Status: Ready

3. [Optional] On the print preview screen, click the **Page Setup** button to adjust paper size/orientation, margin sizes, header/footer or to scale the size of the printed text (to prevent words or columns from cutting off) - or the **Format** button to format title, footnotes, page numbering, or date and time.
4. Click the **Print** button at the top left of the print preview window to send the grid print to your printer.  
**Note:** As an alternative, you can click the **Export to PDF** button to save the grid print as a PDF file.
5. When finished, close the print preview window.

## Making Changes to Events in Batch

The Event Query is perhaps the most popular and most powerful query tool Caterease has to offer. You can make changes to multiple events simultaneously. Quickly and easily change such general details as Sales Rep, Status, Category, etc., and even change financial details, such as tax rates, service charge, gratuity, etc., with the click of a button.

1. Click the **Queries** sidebar on the left-hand side of your screen.
2. Click the **Event Query** button.

**Result:** The Event Base Query window opens.

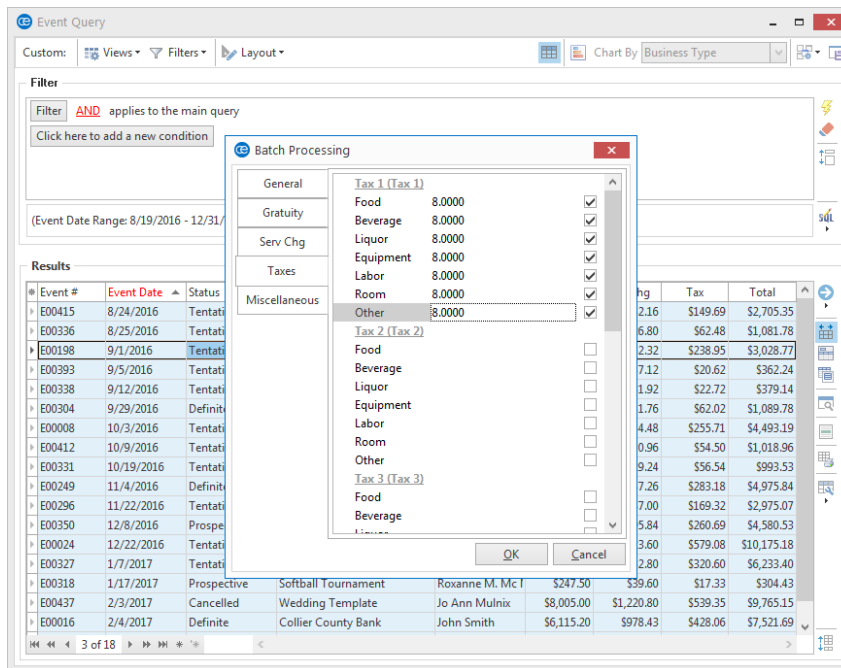
**Tip:** This feature, which is available to Standard and Professional users, is also available in the Current Events Query, Account Query, and Accounts Receivable Query.

3. Set a **Date Range** for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query.
4. Optionally exclude any statuses by selecting an option from the drop-down list to the right of the Exclude Status field.
5. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.
6. Click **OK**.  
**Result:** The Event Query is generated.
7. Click inside the grid, and press your **[Ctrl]** key and **[A]** key simultaneously to highlight all records.
8. Right-click within the grid and choose **Batch Processing**.  
**Result:** The Batch Processing window opens.
9. Click on the tab on the left-hand side of the window which corresponds with the item or items you would like to change.

- **General Options:** Party Name; Status; Sales Rep; Theme; Reference; Category; Business Type; Operation; Billing Client; Billing City; Billing State/Province; Billing Postal Code.
- **Gratuity Rates:** Food; Beverage; Liquor; Equipment; Labor; Room; Other.
- **Service Charge Rates:** Food; Beverage; Liquor; Equipment; Labor; Room; Other.
- **Tax Rates (Tax 1, Tax 2, Tax 3):** Food; Beverage; Liquor; Equipment; Labor; Room; Other.
- **Miscellaneous Financials:** Tax Exempt; Exempt #; Expires. Miscellaneous Adjustments: Subtotal; Gratuity; Service Charge; Tax 1, Tax 2, Tax 3.

**Note:** The options above pertain to the Event Query, Current Events Query, and Accounts Receivable query. (In the Account Query, general options are as follows: Category; Reference; Description; Sales Rep; Group; Pay Method; Tax Schedule.)

10. Type your desired changes into the fields provided.



11. When finished, click **OK**.

**Result:** A confirmation prompt appears.

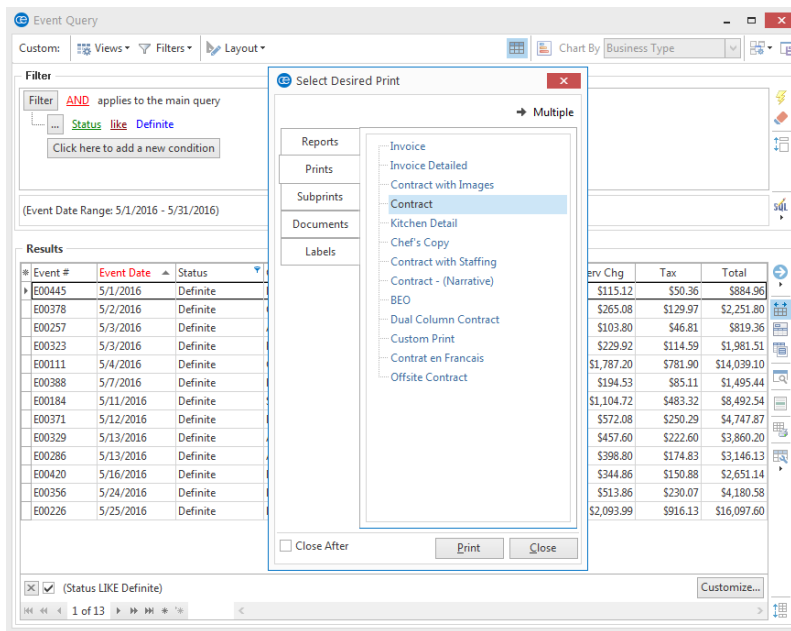
12. Click **Yes**.

**Result:** An informational prompt appears.


13. Click **OK**.

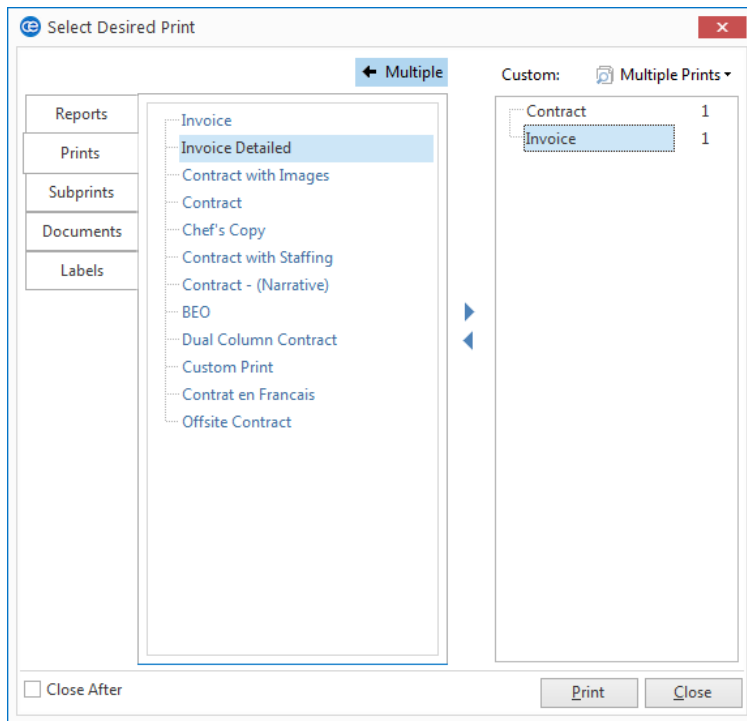
# Generating a Print for Multiple Events

1. Generate a query, such as an Event Query or Current Events Query.
2. From the query results, select multiple events by holding down your **[Shift]** or **[Ctrl]** key while selecting.  
**Note:** The **[Ctrl]** key lets you select individual records; the **[Shift]** key selects two records and all others in-between them.
3. Click the top half of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.  
**Result:** The *Select Desired Print* window opens, where you can select your prints from a floating window.
4. Select the **Prints**, **Sub-Prints**, **Documents**, or **Labels** tab.  
**Note:** Batch printing is not available for reports.
5. Click on a print title.
6. Click the **Print** button at the bottom right-hand side of the window.  
**Result:** A confirmation prompt appears.
7. Click **Yes**.  
**Result:** One print for each of the selected events will be automatically sent to your printer.  
**Note:** Batch prints do not generate a Print Preview; they are sent to your printer automatically.



## Generating Multiple Prints for Multiple Events

1. Select an event from your results screen, or hold your **[Shift]** or **[Ctrl]** key down to select multiple records.  
**Note:** The **[Ctrl]** key lets you select individual records; the **[Shift]** key selects two records and all others in-between them.
2. Click the top half of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.  
**Result:** The *Select Desired Print* window opens, where you can select your prints from a floating window.
3. Click the **Multiple** button, located on the top right-hand side of the window.  
**Result:** A new panel opens along the right-hand side of the *Select Desired Print* window.
4. Select the **Prints, Subprints, Documents, or Labels** tab.  
**Note:** Multiple printing is not available (and not necessary) for reports.
5. Click on a print title.
6. Click the right-arrow button , located in the middle of the *Select Desired Print* window.  
**Result:** Your selected print title is moved to the panel on the right-hand side of the window.
7. Repeat for other desired prints.
8. Type, into the field on the right-hand side of the pane, the number of prints you would like to generate for each print.
9. Click the **Print** button at the bottom right-hand side of the window.  
**Result:** Multiple prints for each of the selected events will automatically be sent to your printer.  
**Note:** Multiple prints do not generate a *Print Preview*; they are sent to your printer automatically.






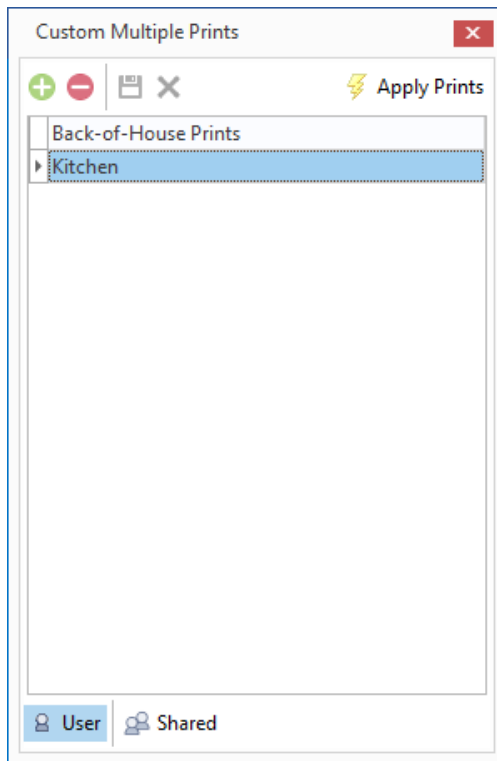
## Creating Custom Multiple Print Lists

Once you have established a list of multiple prints to generate, you can save that list for future use. For example, you can create a custom list of multiple prints called “Back-of-House Prints,” which might consist of kitchen prints, ingredients lists, required items lists, etc., and then retrieve that list, with a single mouse click.

1. Follow the steps in the section above to select multiple prints to be generated.
2. Click the **Multiple Prints** button, located at the top right of the Select Desired Print window.
3. Choose **Custom**.  
**Result:** The Custom Multiple Prints window opens.
4. **[Optional]** Click the **Shared** button, located at the bottom of the Custom Multiple Prints window, if you want this custom prints list to be shared with other users on your Caterease network. (Available in the Professional Version of Caterease.)

**Tip:** If you want all users on your Caterease network to have access to your custom print list, click the **Shared** button at the bottom of the window. Local **(User)** print lists are only accessible on the computer from which they are created. (Professional Version.)

5. Click the **Add Multiple Prints**  .  
**Result:** A line, titled "New Multiple Prints," is added to the list.
6. Type the name of your multiple prints list over the words "New Multiple Prints."
7. Click the **Save Current Multiple Prints List** button  .
8. Close the Custom Multiple Prints window by clicking the  , located on the top right-hand corner of the window.



## Generating Batch E-mail

As an ultimate time-saver, Caterease lets you generate an entire batch of e-mails — multiple e-mails to multiple recipients — with a single mouse click! You can even attach files or Caterease event prints to these e-mails. For example, you can send an e-mail to all clients that owe you money, and attach a unique invoice to each one, as a .PDF (or other common format). But what really makes the Caterease e-mail tool stand out is the ability to use one of your custom Marketing Tools merge letters as the body of your outgoing e-mail! So each recipient receives their custom event print, attached to an e-mail letter that looks as if it were typed especially for him, and your fingers never even have to touch the keyboard!

### Generating Batch E-Mail

1. From the Current Events query (or other query), select multiple events by holding down your **[Shift]** or **[Ctrl]** key while selecting.  
**Note:** *Batch e-mail printing is only available in the Professional version.*
2. Click the **Email** button, located in the **Home** ribbon tab at the top of your screen.  
**Result:** *An Untitled Message window opens.*  
**Note:** *The e-mail address for this outgoing e-mail will default to the Client E-mail associated with each selected record.*
3. Type a subject for your e-mail into the Subject field. Alternatively, click the down arrow to the right of the field to access a custom, user-created, quickpick list.
4. Type a message as the body of your e-mail into the large white text box.  
**Note:** *If you own the Marketing Tools package, you can use one of your custom merge letters as the body of your e-mail. These letters will automatically merge in information from the current prospect, including name, salutation, current date, etc.*
5. **[Optional]** Format the text of your e-mail using the formatting tools in the **Basic Text Editing** area on your e-mail window.
6. **[Optional]** Click the **Attach** button, located at the top of the e-mail window, and choose **File** to attach a different file from your computer, to this e-mail, or choose **Print** to attach one or several Caterease event prints.  
**Note:** *Attached files and prints appear in the small pane at the bottom of the E-mail window.*
7. When finished, click **Send**.  
**Result:** *The e-mails are sent through your E-mail program (often Outlook), and any files you have attached are exported. Although the e-mails are sent as a batch, all merge fields will populate with the specific details for each recipient.*

Contract for [Client.Organization] Modified [Revised.Date] - Message

Message Contact History Templates

Paste

Clipboard

Basic Text Editing

Attach

Tools

Merge Doc

Settings

Windows

To... Client Email

CC...

Bcc...

Send

Subject: Contract for [Client.Organization] Modified [Revised.Date]

[Current.Date.Long]

[Client.Organization]  
Attn: [Book.Contact]

*Re: Contract for Your Event*

Dear [Book.Sal],

Attached is the contract for your [Event.Theme] you are holding in our [Room] room on [Event.Date.Long]. Please take a moment to review the details and then sign and return to me at your earliest convenience.

Sincerely,

Contract with Images.pdf

## Using Caterease Queries

Caterease offers multiple query tools to track different information in the program. Each tool offers a Base Query to set the parameters of the search, and then shows results in a detail grid that can be filtered, grouped, printed, exported, etc. It is important to choose the specific query that is designed for the information you are looking to track. See the table below for a description of each query.

Query	Description
<b>Current Events</b>	You can see a complete list of all events scheduled for the next week, two weeks, month, etc. Options in the base query include Total Current Events; Events Within Next 7 Days; Events Within Next 14 Days; Events Within Next 21 Days; Events Within Next 30 Days; Events This Month; Events Next Fiscal Quarter. <b>Note:</b> You can also include your Remote Data, if desired.
<b>Accounts Receivable</b>	This query tracks all events with a date that has passed and a balance still outstanding. Options in the base query include Total Accounts Receivable; Over 30; Over 60; Over 90; Over 120; 31-60; 61-90; 91-120.
<b>Client Contacts</b>	This query tracks all contacts that have been entered into your database. Options in the base query include records with Only One Primary Contact; Only Contacts with Events; Only Contacts With All Account Address Fields Filled Out; Only Active Accounts.
<b>Contacts Made**</b>	This query, which pertains to Contact Manager, tracks all of the contact history details for an account, such as Contact History Subject and type of contact (phone, e-mail, etc.).
<b>Shift Manager**</b>	The Shift Manager query, which pertains to Employee Manager, allows you to manage a day or date range of multiple shifts at one time. From here you can book employees to multiple shifts, send out e-mail confirmation requests, and confirm the employee to work a particular shift.
<b>Event Query</b>	The Event Query is perhaps the most popular and most powerful query tool Caterease has to offer. Using this feature, you can search through your entire database of events and find only those records that match certain conditions you set. For example, you could search only those events that take place during a certain date range, or only those events with a certain theme, or only those events with a certain sales representative. You could also search for only those events that take place during a certain date range and have a certain theme and a certain sales representative. Any information you need is available at your fingertips. <b>Note:</b> You can also include your Remote Data, if desired.
<b>Account Query</b>	In addition to querying events, you may want to query your list of customers as well. For example, you may want to determine how many customers you have who do not have fax numbers on record with you; or how many customers heard of you from a particular reference; or how many customers are corporate clients, as opposed to government or educational entities. Options in the base query allow you to Include Accounts With Events Only or Include Only Accounts With All Address Fields Filled Out and Exclude On Hold Accounts.
<b>Prospect Query**</b>	Your Prospects Query, which pertains to Prospect Manager, helps you separate your prospective customers (leads) from your active ones. Therefore, this query differs from the previous one because it also contains your list of prospective customers, so you can more easily market to them. Options in the base query allow you to Include Only Prospects With All Address Fields Filled Out or exclude Active Accounts.
<b>Group Booking Query**</b>	This query, which pertains to Guestrooms Manager, shows all group contracts booked for a particular day or within a date range.
<b>Payments Query*</b>	The Payments Activity Query tracks all payments made to your company during any day or date range. As in all of our queries, powerful grid tools are available, such as sorting, filtering, or grouping your data. Thus, you can use this tool to answer such questions as "Which sales representative has received the most credit card payments this month?" or "What has been my most common method of payment this year?" Options in the base query are to Include Only Closed Events or Include Group Booking Payments.
<b>SubEvent Query*</b>	This query is focused on your sub-events, in other words, the individual meals you have served. For example, you can use this to track how many "Dinner Buffets" you've had during a particular date range or which type of sub-event has generated the most revenue, etc. Options in the base query allow you to Exclude SubEvents Without Rooms or Exclude SubEvents Without Site Locations.
<b>Staffing Query*</b>	This query, which pertains to Employee Manager, is designed to track all employees

Query	Description
	you have booked for any day or date range. As with the other activity queries, you can sort, group, or filter your data and answer various questions about your employee staffing activity.
<b>Food/Service Items Query*</b>	The Food/Service Query is a flexible tool that allows you to track any menu items you have ordered for any day or date range. Using this powerful feature, you can filter, sort, and group your data to find answers to such questions as, "Which venue has sold the most rental equipment?" or "Which sales representative is doing the best with this month's wine contest?" All food, liquor, equipment, and service item revenue can be tracked any way you want. Options in the base query allow you to Exclude Items Without Quantities, Exclude Items Without Totals, or Exclude Modifiers.
<b>Proposal Query*</b>	This query, which pertains to Prospect Manager, is a flexible tool that allows you to track any proposals that you have created for any day or date range.
<b>Guestroom Query*</b>	This query, which pertains to Guestrooms Manager, shows the actual rooms (room dates and types) booked for group contracts; i.e., how many rooms of a particular type (singles, queens, etc.), have been booked, rate, how many bookings were generated by a particular sales representative, etc.
<b>Ingredient Query*</b>	This query shows all ingredients that are needed for events on a particular day or within a date range. Options in the base query allow you to Exclude Items Without Quantities or Include All Sub-Recipe Ingredients.
<b>Required Item Query*</b>	This query is designed to track all of the required items (packing list items) you will need for the events on a particular day or within a date range. An available option in the base query is to Exclude Items Without Quantities.
* Available in the Professional Version ** Available if you own the corresponding add-in module	



## Unit 20: Managing Staff for an Event

In this section, you will learn:

- Creating Default Shifts or Positions
  - Establishing Shift Rules
  - Adding Employees
- Assigning a Position to an Employee
- Setting Employee Work Schedules and Vacations
- Selecting and Managing Staff for an Event
  - Managing Event Shifts
- Customizing the Shift and Employee Grids
  - Printing a Staffing Sheet for an Event
  - Printing a Scheduled Shifts Report
  - Printing an Employee Staffing Schedule




## Creating Default Shifts or Positions


Employee Manager is where you go to establish all the positions or shifts your employees might be scheduled to work. After adding the position ("Waitstaff," "Bartender," etc.), you can then designate other relative details: an optional price to charge the customer; an estimated cost to you; default event times; and even event rules to determine how many employees each position will require.

### Adding a Position

You can create and store as many event staff positions as you'd like, such as wait staff, bartenders, hosts/hostesses, delivery drivers, meat carvers, setup staff, etc., and then assign each position its own set price, uniform, or even default shift times.

1. Click the **Main** button from the CaterEase sidebar area, located on the left-hand side of your screen.
2. Click the **Employee Manager** button.
3. Click the **Tools** button, located in the **Home** ribbon tab at the top of the Employee Manager window, and choose **Shift Setup** (or click the **Shift Setup** button , located in the toolbar at the bottom of your screen, depending on your personal configuration).

**Result:** The Shift Wizard Setup window opens.

4. Click the **Add Position** button , located at the top left-hand side of the window.  
**Result:** A confirmation prompt appears.
5. Click **Yes** to confirm.  
**Result:** A new line is added to the bottom of the **Position** grid.
6. Type the name of the new position into the Position field, located in the **General** pane on the right-hand side of the window.
7. Press **[Enter]** or **[Tab]** to move to the next field.
8. **[Optional]** In the Uniform field, type the name of the uniform or click the down arrow and select an option from the drop-down quickpick list.  
**Note:** The Employee Manager quickpicks listed here are set up in **Setup > Quickpicks > Employee Manager**. See "Creating Employee Manager Quickpick Lists" for information about adding quickpicks to Shifts and Staffing.
9. **[Optional]** In the Agency field, type the employment agency name (if applicable) or click the down arrow and select an option from the drop-down quickpick list.
10. **[Optional]** Click into the Est Cost field and type the estimated cost (per hour) for the position.  
**Note:** You can also enter an estimated shift price by clicking the down arrow and accessing the drop-down calculator.
11. Click into the Price field and type a default price (per hour) for the shift, or click the down arrow to the right of the field to access the calculator tool.
12. **[Optional]** Click into the **Flat Rate** checkbox to designate the shift price as a flat rate.

13. **[Optional]** Set the **Default Shift Times** by selecting the desired options from the drop-down lists.

**Note:** The **Default Shift Times** are set to the Start and End times associated with the sub-event.

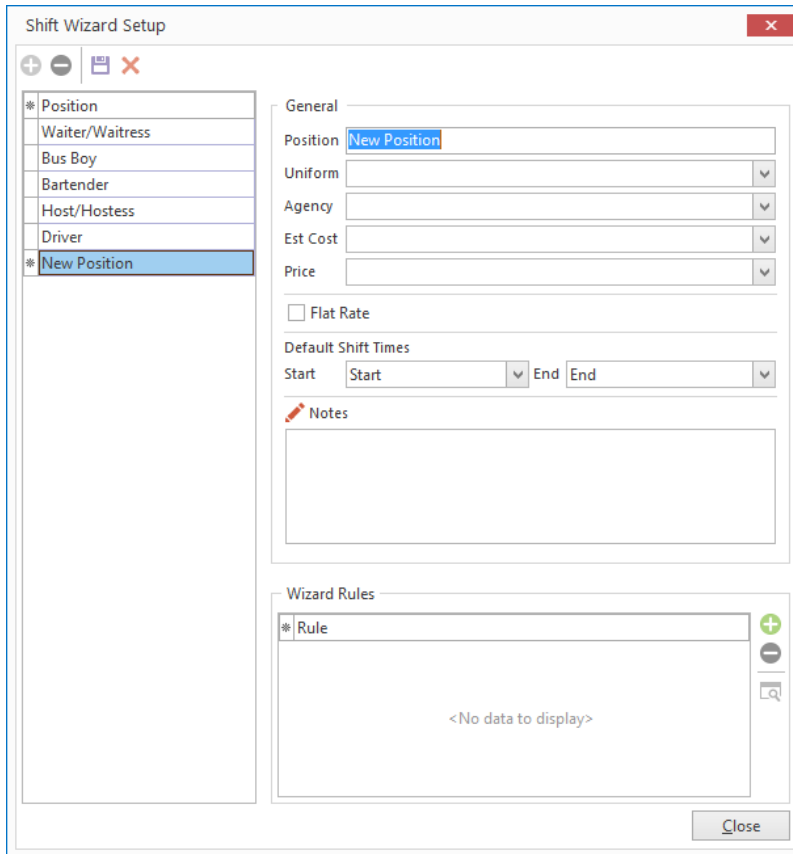
**Tip:** For more information about Est Cost, Price, and Flat Rate fields, see the section entitled "Customizing the Staffing Grid."

14. **[Optional]** Click into the **Notes** text box and type relevant position notes as desired.

15. **[Optional]** Establish any desired shift rules. (See the next topic, "Establishing Shift Rules.")

16. Click the **Save Changes** button  , located at the top left-hand side of the window.  
**Result:** The Position is saved.



17. Click **Close** to close the window.

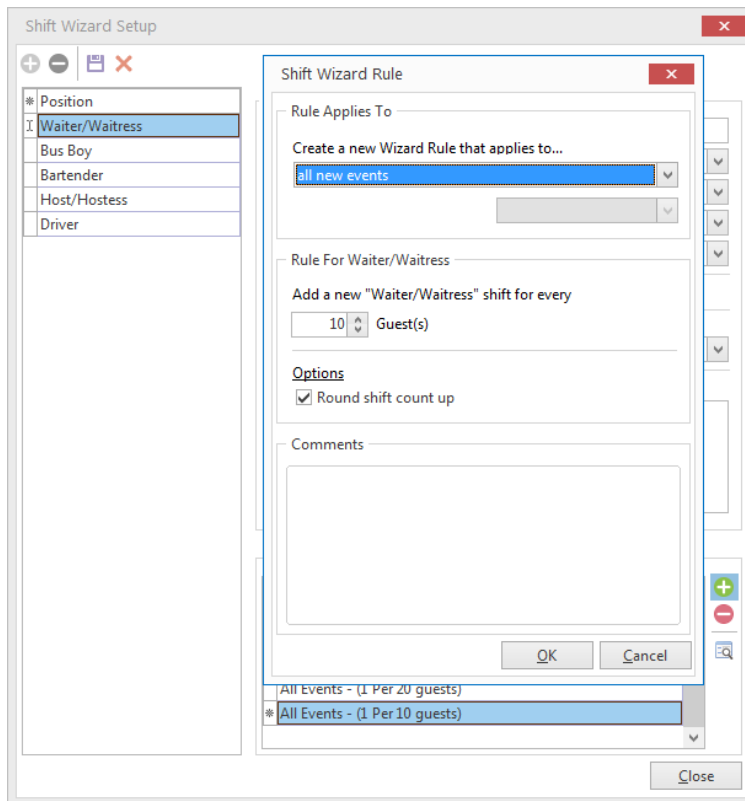



## Establishing Shift Rules

Once you've created your shift position, you can apply various rules to the shift. Maybe you want to establish a rule that, whenever you book a wedding, you need to assign one wait-staff for every ten guests. Choose to add a new shift based on a set number of guests, then apply your shift rule to a certain theme or event category. Once you add an event, Caterease will apply your shift rules based on the guest count, and will give you the total required amount of staff needed for the event. (Available in Standard and Professional versions of Caterease.)


### Establishing Shift Rules

1. Click the **Main** button from the Caterease sidebar area.
2. Click the **Employee Manager** button.
3. Click the **Tools** button, located in the main toolbar at the top of your screen, and choose **Shift Setup** (or click the **Shift Setup** button  at the bottom of your screen, depending on your personal configuration).  
**Result:** *The Shift Wizard Setup window opens.*
4. Click on a position in the **Position** grid, in the left-hand pane, (or add a position, as described previously).
5. Click the **Add Rule** button , located at the bottom right-hand side of the Shift Wizard Setup window, in the **Wizard Rules** area.  
**Result:** *The Shift Wizard Rule window opens.*



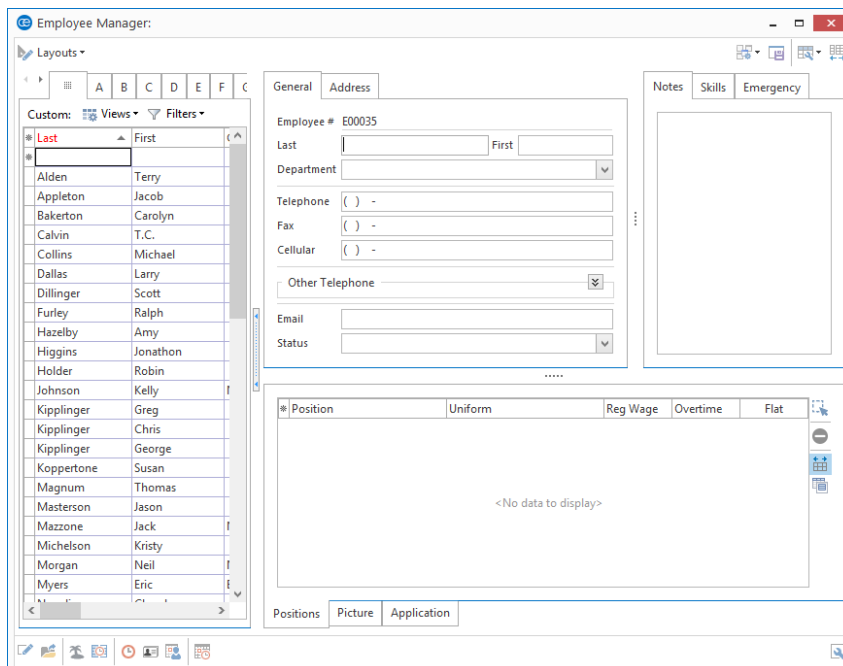
6. Click the down arrow in the first field beneath **Create a new Wizard Rule that applies to...**
  - all new events (Select this option to apply the shift rule to all events.)
  - events with a theme of
  - events with a category of
7. If selecting the **Theme** or **Category** option, click the down arrow in the second field and make a selection from the quickpick list.  
**Note:** The second field is not active for "All new events."
8. In the **Rule For...** section, type the number of guests to add for every shift, or use the up-and-down arrows to adjust the number of guests.
9. **[Optional]** Click into the checkbox under **Options** to round the shift count up, if needed.
10. **[Optional]** Click into the **Comments** text box and type any desired shift rule comments.
11. Click **OK** to close the Shift Wizard Rule window.
12. Click the **Save Changes** button  , located at the top of the Shift Wizard Setup window.  
**Result:** The Shift and Shift Rules are saved.
13. Click **Close** at the bottom of the Shift Wizard Setup window.

## Adding Employees


1. Click the **Main** button from the sidebar area on the left-hand side of your Caterease screen.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button , located in the main toolbar at the top of your Caterease screen, in the **Home** ribbon tab.

**Result:** A confirmation window opens.

4. Click **Yes** to confirm your choice.  
**Result:** A new employee field is added to the top of the list, with the cursor positioned in the Last field.  
**Note:** The Employee #, located above the Last field, is auto-assigned by Caterease.



5. Type the employee's last name into the Last field.
6. Press **[Enter]** or **[Tab]** to move to the next field.
7. Fill out the remaining **General** tab fields by typing directly into the fields or by selecting items from the corresponding drop-down lists (if quickpick items have been added).  
**Note:** Press **[Tab]** or **[Enter]** to move from field to field.

8. **[Optional]** Add any extra fields to your screen, remembering to click the **Save Current Window Settings** button  to save your new default view.

## Filling Out the Address Tab

1. Click the **Address** tab, located to the right of the **General** tab, on the main Employee Manager screen.

The screenshot shows the 'Employee Manager: Johnson, Kelly' window. On the left is a list of employees with columns for 'Last' and 'First'. The 'Address' tab is selected and highlighted with a red circle. The main area contains two address sections: 'Home Address' and 'Mailing Address'. Both sections have fields for 'Address', 'City', 'St/Prov', 'Postal', and 'Country'. The 'Home Address' fields are populated with '123 Elm Street', 'Naples', 'FL', '34123', and 'USA'. The 'Mailing Address' fields are also populated with the same information. To the right of the address fields are tabs for 'Notes', 'Skills', and 'Emergency'.

2. Under **Home Address**, click into the Address field and type the employee's home address.
3. Press **[Enter]** or **[Tab]** to move to the next field.
4. Continue to complete the home address information by typing into each field and pressing **[Enter]** or **[Tab]** to move to the next field.
5. Under **Mailing Address**, click into the Address field and type the employee's mailing address, if different from the home address. (The **Mailing Address** auto-populates based on the information entered in the **Home Address** fields.)
6. Continue to complete the mailing address information by typing into each field and pressing **[Enter]** or **[Tab]** to move to the next field.

## Adding Additional Employee Information

1. **[Optional]** Click the **Notes** tab, located at the top right-hand side of your screen.
2. Click into the text box and type any notes associated with the employee.  
**Note:** You may also access the Scratch Pad to insert pre-typed notes by clicking the **Scratch Pad** button



, selecting (highlighting) the text, and clicking the **Insert Text** button.

3. **[Optional]** Click the **Skills** tab, located to the right of the **Notes** tab, at the top of your screen.
4. Click into the text box and type employee skills information, or use the Scratch



Pad to insert pre-typed text.

**Note:** You may format your text in both the **Notes** and **Skills** tabs by right-clicking into the text box and selecting **Font** or by using the **Basic Text Editing** tools at the top left-hand side of your screen.

**Tip:** Add text to your Scratch Pad from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.

5. **[Optional]** Click the **Emergency** tab, located at the top right of your screen, then click into the white text box and enter employee emergency contact information or medical-related information.
6. **[Optional]** To add a picture of the employee, click into the **Picture** tab, located at the bottom of your screen. Next, right-mouse click into the empty text box, select **Load From File** from the pop-up menu, then browse to and select a stored employee picture.
7. **[Optional]** To attach the employee's supporting documents, such as a scanned image of a driver's license, click the **Application** tab, located at the bottom of your screen. Next, right-mouse click into the text box, select **Load From File** from the pop-up menu, then browse to and select a stored image.  
**Note:** You can also use the **Related Files** area to store supporting documents, such as a resume or letter of recommendation. For more information, see the section on adding employee-related files.

Employee Manager: Alden, Terry

Layouts ▾

Custom: ▾ Views ▾ Filters ▾

Last	First
Alden	Terry
Appleton	Jacob
Bakerton	Carolyn
Calvin	T.C.
Collins	Michael
Dallas	Larry
Dillinger	Scott
Furley	Ralph
Hazelby	Amy
Higgins	Jonathon
Holder	Robin
Johnson	Kelly
Kipplinger	Greg

General Address

Home Address

Address

City St/Prov Postal

Country

Mailing Address

Address

City St/Prov Postal

Country

Notes Skills Emergency




Contact Susan Alden (wife) in case of Emergency.  
239.555.5555 (cell)

Position Unit Reg Manager Out of Office Flat

## Assigning a Position to an Employee

Once you've entered your basic employee information into Employee Manager, you must assign that employee a position if you want to be able to select the employee for an event. You can assign an employee multiple positions and then select the employee for the event according to the desired position you are filling.

### Assigning a Position

1. From the Employee Manager main screen, click the **Positions** tab, located at the bottom of your screen, if it is not already selected.
2. Click the **Select Positions for Employee** button , located on the right-hand side of your screen, towards the middle.  
**Result:** The Select Position window opens.
3. Double-click on a position to select it.  
**Result:** The position is selected, and appears in the **Positions** tab grid.  
**Note:** You can select more than one position.
4. Click the  at the top of the Select Position window to close the window.
5. **[Optional]** Click into the Uniform field and select the required uniform from the drop-down list.  
**Note:** Uniform information will default if already assigned in the Shift Setup area. Refer to Unit 1.
6. Press **[Tab]** or **[Enter]** to move to the next field.
7. Click into the Reg Wage field and type the employee's regular hourly wage.  
**Note:** You may also click the down arrow to the right of the field to access the drop-down calculator.
8. **[Optional]** Click into the Overtime field and type the employee's overtime wage.  
**Note:** You may also click the down arrow to the right of the field to access the drop-down calculator.
9. If the wage is a flat rate, click into the Flat checkbox to place a check mark.
10. When finished adding position information, save your changes by clicking the **Save Changes** button , located in the **Home** ribbon tab at the top of your screen.

Employee Manager: Alden, Terry

Layouts ▾

Custom: Views ▾ Filters ▾

Last	First
Alden	Terry
Appleton	Jacob
Bakerton	Carolyn
Calvin	T.C.
Collins	Michael
Dallas	Larry
Dillinger	Scott
Furley	Ralph
Hazelby	Amy
Higgins	Jonathon
Holder	Robin
Johnson	Kelly
Kipplinger	Greg
Kipplinger	Chris
Kipplinger	George
Koppertone	Susan
Magnum	Thomas
Masterson	Jason
Mazzone	Jack
Michelson	Kristy
Morgan	Neil
Myers	Eric
Napoli	Cheryl

General Address

Employee # E00021

Last Select Position

Department Select

Telephone Position

Fax Waiter/Waitress

Cellular Bus Boy

Other Tele Bartender

Email Host/Hostess

Status Driver

Reg Wage Overtime Flat


\$7.00	\$11.00	
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Positions Picture Application

## Setting a Defined Employee Work Schedule

With Employee Manager, you are able to designate the days and times an employee is unavailable for work. You can mark an employee as unavailable all day or unavailable within a time range on a given day of the week. Once these days or time ranges are established, you will be able to view which employees are available (or unavailable) for an event.

### Setting an Employee Work Schedule

1. From your Employee Manager main screen, click on the name of the employee whose work availability you would like to set.
2. From the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, select **Work Times**, or click the **Work Times** button , located at the bottom of the screen, depending upon your personal configuration.  
**Result:** The Enter Weekdays And Times Employee CANNOT Work window opens.
3. Click into a **Weekdays** checkbox.
4. Click either the **All Day** or **Within Times** radio button.  
**Note:** Selecting **Within Times** will enable access to the Time Ranges From and To fields.
5. If **Within Times** is selected, type a **From** and a **To** time.  
**Note:** You are able to set two time ranges per day.
6. Continue establishing days/times the employee is unable to work, as described above.
7. When finished, click **OK** to close the window.

Enter Weekdays And Times Employee CANNOT Work

		Time Ranges			
Weekdays	Cannot Work	From	To	From	To
<input checked="" type="checkbox"/> Monday	<input type="radio"/> All Day <input checked="" type="radio"/> Within Times	09:00 AM	12:00 PM	06:00 PM	08:00 PM
<input type="checkbox"/> Tuesday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input type="checkbox"/> Wednesday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input type="checkbox"/> Thursday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input checked="" type="checkbox"/> Friday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input type="checkbox"/> Saturday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input type="checkbox"/> Sunday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				

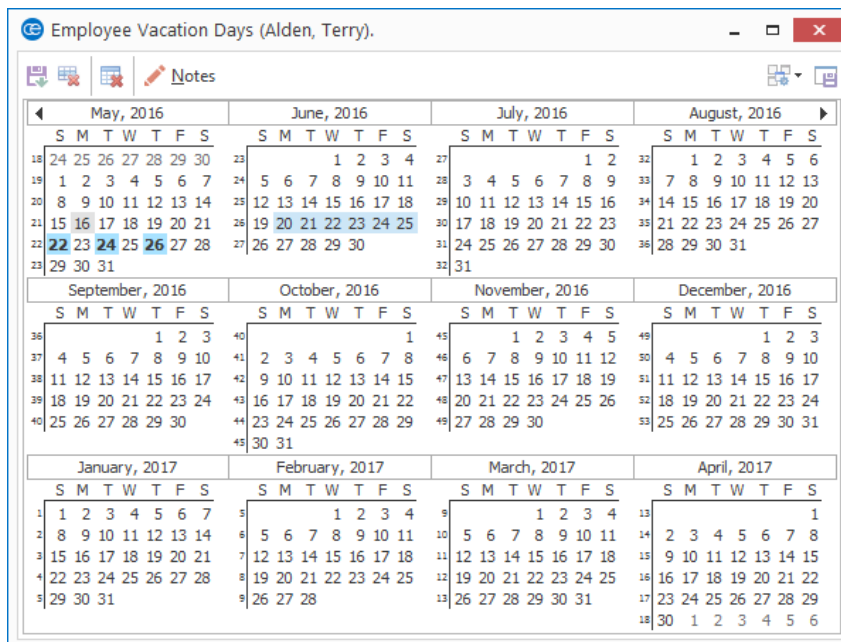
OK Cancel


## Setting Employee Vacation Days

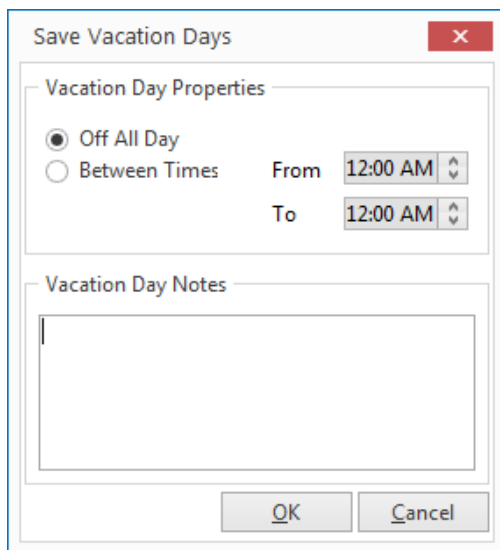
1. From your Employee Manager main screen, click on the name of the employee whose vacation dates you would like to set.
2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen,

and select **Employee Vacations**, or click the **Employee Vacations** button  at the bottom of your screen, depending upon your personal configuration.

**Result:** The Employee Vacation Days window opens.



3. Click and hold the left mouse button down on the vacation start date.
  4. Drag the mouse to the end date and release the mouse button.
  5. Click the **Set Selected Dates** button  from the top left-hand side of the window.
- Result:** The Save Vacation Days window opens.



The image shows a 'Save Vacation Days' dialog box. It has a title bar with a close button (X). The dialog is divided into two main sections. The first section, 'Vacation Day Properties', contains two radio buttons: 'Off All Day' (which is selected) and 'Between Times'. To the right of the 'Between Times' radio button are two time selection fields labeled 'From' and 'To', both currently set to '12:00 AM'. The second section, 'Vacation Day Notes', contains a large text area for entering notes. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

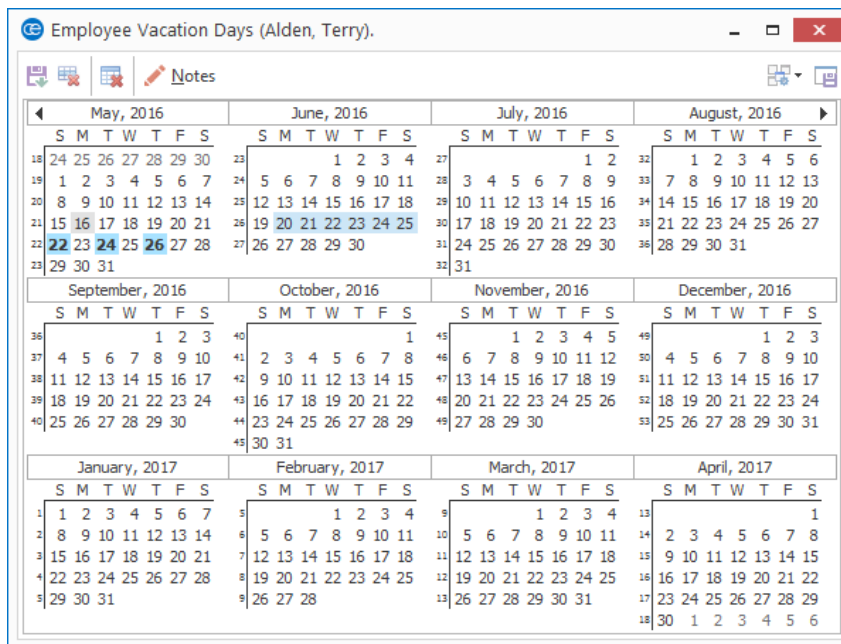
6. Click either the **Off All Day** radio button or the **Between Times** radio button.  
***Note:** If **Between Times** is selected, the From and To time fields are enabled.*
7. **[Optional]** Click into the **Vacation Day Notes** text block and type any relevant notes.
8. When finished, click **OK**.


## Clearing Selected Vacation Dates



1. From your Employee Manager main screen, click on the name of the employee whose vacation dates you would like to clear (remove).
2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen,

and select **Employee Vacations**, or click the **Employee Vacations** button  at the bottom of your screen, depending upon your personal configuration.

**Result:** The Employee Vacation Days window opens.



3. Click and hold the left mouse button on the vacation start date you would like to clear.
4. Drag the mouse to the vacation end date you would like to clear.
5. Click the **Clear Selected Dates** button .
 

**Note:** To remove only one vacation day, click on the desired day you would like to clear, and click the **Clear Selected Dates** button . To remove all vacation days for a particular employee, see the topic below.
6. Click the **Close** button  at the top right-hand side of the window to close the window.

## Selecting Event Staff

1. In the Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of your screen.

**Result:** The Event Manager switches to the Sub-Event display.

2. Select a sub-event (if more than one) in the pane on the left-hand side of your screen.

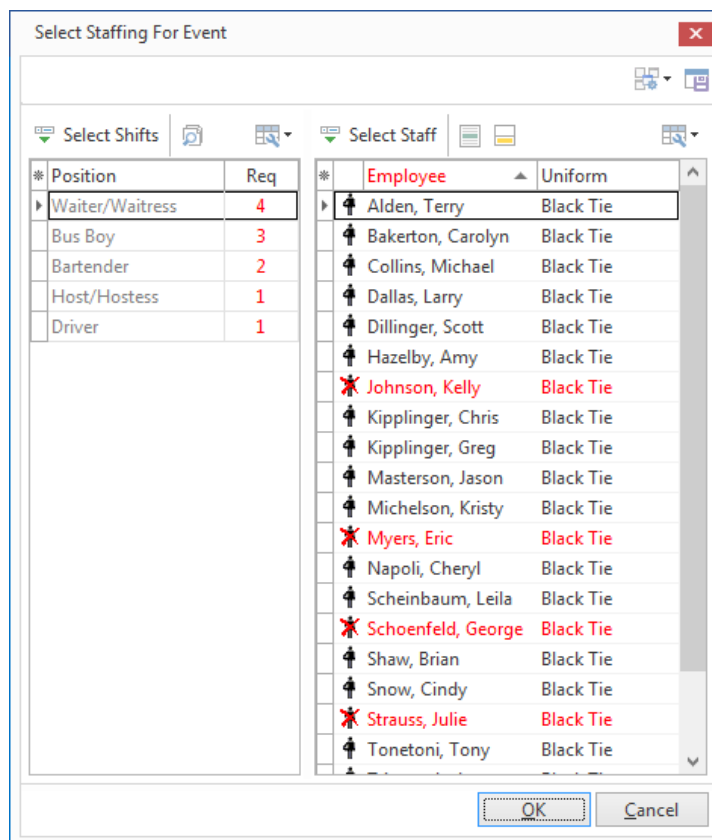
**Note:** The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. You can use the scroll bar at the right of the pane or the navigation bar below the pane to scroll through the sub-events.

3. Click the **Staffing** tab at the bottom of the screen.

4. Click the **Select Staff** button , located at the right of the **Staffing** tab.

**Result:** The Select Staffing for Event window opens, with employees separated into groups based on their positions.

**Tip:** In addition to (or instead of) tracking specific employees, you can also simply keep track of "shifts" for an event (how many unnamed "waiters" or "bartenders" the party will require). See "Managing Event Shifts," below, for more information.



5. In the left pane of the window, click the "position," or shift ("Waiter/Waitress," "Bartender," "Bus Boy," etc.), that you want to schedule.

**Result:** The right-hand pane of the window displays the list employees for that specific position.

**Note:** Employees whose names are printed in red are unavailable to work this event. Click the **View Con-**

**flits** button  on the *Select Staff* window to see why.

6. Select any available employees (drag your mouse or use your **[Ctrl]** key to select more than one at a time).

**Note:** To select an unavailable employee (one highlighted in red), you must first click the **Settings** but-

ton  at the top right-hand side of the window and choose **Staff Selection > Allow Selection of**

**Unavailable Employees.** (Click the **Save Window Settings** button  to have this option default as enabled.)

7. Click **OK**.

**Result:** The selected employees are added to the **Staffing** tab of the event, with their Start and End times defaulting to whichever event times you have established as the defaults for their shifts.

**Note:** As an alternative to clicking **OK**, you can drag and drop selected employees from the *Select Staff* window onto the **Staffing** tab in *Event Manager*, or you can click the **Select Staff** button.

8. **[Optional]** On the **Staffing** tab in *Event Manager*, click into the checkbox in the Conf column for any employees who have confirmed they can work this party. Click into the checkbox in the Flat column to optionally make the employee's wage a "flat" wage (not multiplied by hours worked).

**Note:** To have employees automatically "confirmed" when they are selected into the event, click the **Set-**

**tings** button , located at the top right-hand side of the *Select Staffing* window, and choose **Staff Selection > Select Staff as "Confirmed."**

## Managing Event Shifts

1. In the Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.

**Result:** The Event Manager switches to the Sub-Event Display.

2. Select a sub-event (if there are more than one) in the pane on the left-hand side of the screen.

**Note:** The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. You can use the scroll bar at the right of the pane or the navigation bar below the pane to scroll through the sub-events.

3. Click the **Staffing** tab at the bottom of the screen.

4. Click the **Select Staff** button , located at the right of the **Staffing** tab.


**Result:** The Select Staff window opens, with employees separated into groups based on their positions.

5. In the Select Staff window, double-click on any shift ("Waiter," "Bartender," etc.), to retrieve it into the sub-event.

**Result:** That shift - complete with optional price, required number, etc. - is added to the **Staffing** tab in the sub-event. (See "Customizing the Shift and Employee Grids," below, for information on how to display these details in your shifts grid.)

**Note:** You can also highlight multiple shifts by dragging or dropping or using your **[Ctrl]** or **[Shift]** key, then clicking **OK** to retrieve.

6. Repeat Step 5 to retrieve other shifts as desired.


7. **[Optional]** Click the **View Shift Rules** button  to see the specific rule (created by you) that the program used to calculate the required number for a particular shift.

**Note:** Shift rules are established by you when you set up your program's shifts.

8. When finished, click **OK** to close the Select Staff window.

**Tip:** You can use the CaterEase Shift Wizard to establish rules dictating how many of each shift is required to service a particular event. These required numbers will automatically calculate for each party, and reports and management tools allow you track events that are understaffed.

# Customizing the Shift and Employee Grids


1. Click the **Quick Column Customizing** button , located at the top left of the Shift or Employee grid on the **Staffing** tab.

**Result:** A drop-down list of optional columns appears.

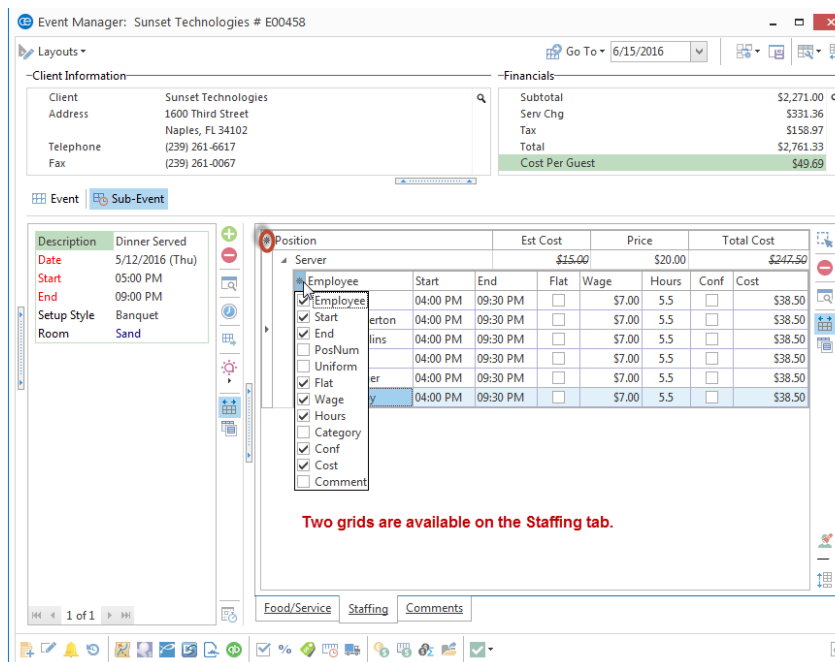
**Note:** There are two buttons available, as there are two grids - one for "shifts" and another for "employees."

2. Click into the checkbox next to any column heading to have that column appear in the corresponding grid.

**Result:** Any columns with checks next to them display in the grid.

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

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



Event Manager: Sunset Technologies # E00458

Go To: 6/15/2016

**Client Information**

Client: Sunset Technologies  
Address: 1600 Third Street  
Naples, FL 34102  
Telephone: (239) 261-6617  
Fax: (239) 261-0067

**Financials**

Subtotal	\$2,271.00
Serv Chg	\$331.36
Tax	\$158.97
Total	\$2,761.33
Cost Per Guest	\$49.69

**Event** | **Sub-Event**

**Description** Dinner Served  
**Date** 5/12/2016 (Thu)  
**Start** 05:00 PM  
**End** 09:00 PM  
**Setup Style** Banquet  
**Room** Sand

**Position**

	Start	End	Flat	Wage	Hours	Conf	Cost
Server			\$15.00		\$20.00		\$247.50
Employee				\$7.00	5.5		\$38.50
erton	04:00 PM	09:30 PM		\$7.00	5.5		\$38.50
lins	04:00 PM	09:30 PM		\$7.00	5.5		\$38.50
Uniform	04:00 PM	09:30 PM		\$7.00	5.5		\$38.50
er	04:00 PM	09:30 PM		\$7.00	5.5		\$38.50
y	04:00 PM	09:30 PM		\$7.00	5.5		\$38.50

Two grids are available on the Staffing tab.

Food/Service | **Staffing** | Comments

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.

## Printing a Staffing Sheet for an Event

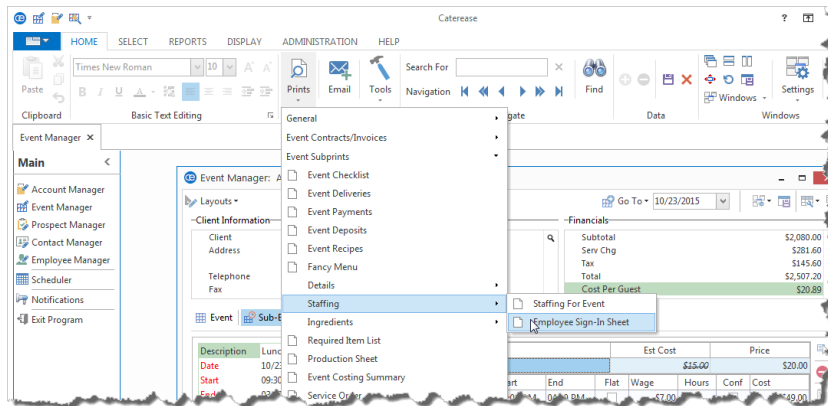
1. With your event open in Event Manager, click the bottom half of the **Prints** button in the **Home** ribbon tab at the top of the screen.

**Result:** A drop-down list of options appears.

**Note:** You can also click the top of the **Prints** button to get a print selection window, and then choose the **Subprints** tab and move on to Step 3, below.

2. Click **Event Subprints**.

**Result:** Another drill-down list appears.



3. Choose **Staffing > Staffing for Event** or **Staffing > Employee Sign-In Sheet**.

**Result:** A preview window for the print appears.

**Note:** These prints (and other miscellaneous event sub-prints) can be customized using the *Miscellaneous Prints Designer*.

4. Click the **Print** button at the top of the print preview screen to send the print to a printer.

**Tip:** You can also generate a staffing reports for an entire day or date range by clicking the **Reports** ribbon tab at the top of the screen and choosing **Management > Employee Staffing** or **Management > Scheduled Shifts**. In addition, you can run a *Staffing Activity Query* (Professional version only) to get more custom information in a detail grid display.

## Printing a Scheduled Shifts Report

The Scheduled Shifts Report is a powerful tool which allows you to print a schedule of a shift or all shifts based on a day or date range. You can even choose to display the name or names of the employees assigned to work the shift, along with additional staffing information. Additionally, the Scheduled Shifts Report will even give you the option of grouping the report based on selected event information.

**Tip:** As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

### Printing a Scheduled Shifts Report

1. Click **Reports > Management > Scheduled Shifts**.

**Result:** The Scheduled Shifts window opens.

2. **[Optional]** Change the title of the report by typing over the words "Scheduled Shifts."
3. Set a date range for your report by choosing the option **Less Than Or Equal To**, **Greater Than Or Equal To**, **Within Date Range**, or **Relative Date Range**.
4. **[Optional]** Exclude an desired statuses by selecting the status from the **Exclude Status** drop-down list. Choose from among Closed, Prospective, Tentative, Cancelled, and Definite.
5. **[Optional]** Group by Date, Shift, Sales Rep, or Client by selecting the respective option from the **Group By** drop-down list.

6. **[Optional]** Click into the **Specific Shift** checkbox, then the corresponding down arrow and select a position from the drop-down list.
7. **[Optional]** Click into the **Show Staffing Details** checkbox to include the assigned employee information.
8. **[Optional]** Click into the **Suppress Fully Booked & Confirmed Shifts** checkbox to show only the shifts that require staffing.
9. Click **OK**.

**Result:** *The Scheduled Shifts Report is generated, incorporating the parameters you established.*

## Printing an Employee Staffing Schedule

The Employee Staffing Report allows you to print an employee schedule based on a day or date range for an individual employee or for all employees. Information in this report includes the assigned position; the event client; the event theme; the assigned room; the employee start and end times; and the total number of event work hours. In addition, the report will identify employees that are confirmed to work their assigned event.

**Tip:** As an option, click the checkbox labeled **Close After Printing** at the bottom left of the tool to have this window close automatically as soon as your report has been printed.

### Printing an Employee Staffing Schedule

1. Click **Reports > Management > Employee Staffing**.  
**Result:** The Employee Staffing window opens.
2. Set a date range for your report by choosing the option **Less Than Or Equal To**, **Greater Than Or Equal To**, **Within Date Range**, or **Relative Date Range**.
3. **[Optional]** Change the title of the report by typing over the words "Employee Staffing."
4. Select from among Employee Staffing Schedule, Employee Staffing Schedule (No Wage Details), or Employee Diary.  
**Note:** Selecting **Employee Diary** enables you to print separate employee schedules in diary format rather than in a grid layout. With diary format, each print will include the event date; the assigned position; employee start and end times; the client's name, address, and phone number; the assigned room; the confirmed date; and the time, party name, and event theme. Off-premise caterers can choose to include the site location information, as well.
5. **[Optional]** Click into the checkboxes under **Sort Order** and choose to group Staffing items by a certain detail.  
**Note:** You can drag and drop these fields to customize your sort order.
6. **[Optional]** Click into the **Include Site Directions** checkbox if you would like to include the directions to the site location in the report.
7. **[Optional]** Exclude any desired statuses by selecting the status from the **Exclude Status** drop-down list. Choose from among Closed, Prospective, Tentative, Cancelled, and Definite.
8. **[Optional]** For an individual employee schedule, click the **Specific Employee** checkbox, then click the corresponding down arrow and select an employee.
9. Click **OK** to generate the report.  
**Result:** The Employee Staffing Report is generated, incorporating the parameters you established.

Employee Staffing

Set Parameters

Date Range

☐ Less Than Or Equal To

4/1/2016

thru

4/30/2016

☐ Greater Than Or Equal To

☐ Within Date Range

☒ Relative Date Range

This month

Title

Employee Staffing

Options

Report Format

☒ Employee Staffing Schedule

☐ Employee Staffing Schedule (No Wages Details)

☐ Employee Diary

☐ Include Site Directions

Sort Order

☒ Employee

☐ Position

☐ Room

☐ Sales Rep

☒ Date

☐ Start

☐ Event #

Exclude Status

Closed;Cancelled

☐ Specific Employee

☐ Close After Printing

OK

Cancel

## Unit 21: Creating Automatic Change Notifications

In this section, you will learn:

- Setting Up Automatic User Notifications
  - Establishing a Custom Filter
- Viewing and Managing Notifications
- Enabling and Disabling Notifications
- Using the Notifications Backstage Tab



# User Notifications Module

It is extremely important for you and your team to be constantly updated. The incredible Caterease Automatic Notifications feature not only lets you tell the program what specific changes you or others want to be notified about, but it also allows you to have those notifications sent to you via e-mail or text.

## Setting up Notifications

1. Click the **Administration** ribbon tab, located at the top of your screen.
2. Choose **General > Notifications Setup**.  
**Result:** The Notifications Setup window opens.

#	Name	Change In...	Change Of...
1	Date Change	Sub-Events	Date

**Notification Details**

Name:

Change In:

Type:

Change Of:


Category:

**Condition**

**Notify Users**

User Name	Text Msg	Email
Default Administrator	<input type="checkbox"/>	<input type="checkbox"/>
John Smith	<input type="checkbox"/>	<input type="checkbox"/>
Jo Ann Mulnix	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

3. Click the **Add Notification** button , located in the middle of the window, towards the top.
4. Fill out the information in the **Notification Details** area:
  - **Name** - Type a Notification Name into the Name field.
  - **Change In** - Choose from the list of options available in the drop-down list to the right of the Change In field: Events; Sub-Events; Food/Service Items; Shifts; Payments.
  - **Type** - Select **Change** or **New** from the Type drop-down list.  
**Note:** "New" is available only if **Event** or **Payment** is selected in the Change In field.
  - **Change Of** - Select an option from the Change Of drop-down list.

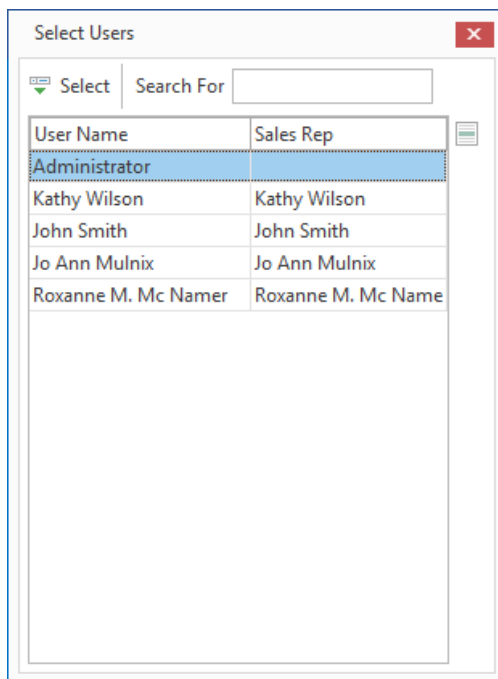
**Note:** Available options depend on what is selected in the Change In field.

- **Category** - Select an option from the drop-down quickpick list to the right of the Category field.

5. Optionally apply any desired filters by clicking the **Filter** button  and customizing the conditions. (See "Establishing a Custom Filter," below.)

6. Click the **Add User** button , in the **Notify Users** area at the bottom right-hand side of the window.  
**Result:** The *Select Users* window opens.

7. Double-click on any User Name/Sales Rep who should receive this notification.  
**Note:** You can also highlight multiple users by dragging or dropping or by using your **[Ctrl]** or **[Shift]** key, then clicking **Select** to retrieve.



8. Click the , located at the upper right-hand side of the window, to close the window.  
**Result:** You are returned to the *Notifications Setup* window.

9. Click into the **Text Msg** and/or **Email** checkbox next to a User Name/Sales Rep to choose which users will be alerted via e-mail or text message when changes have been made or records have been added.  
*To receive an alert via text message, the user must be registered with Twilio.*

10. Click **OK** to exit and save your changes.

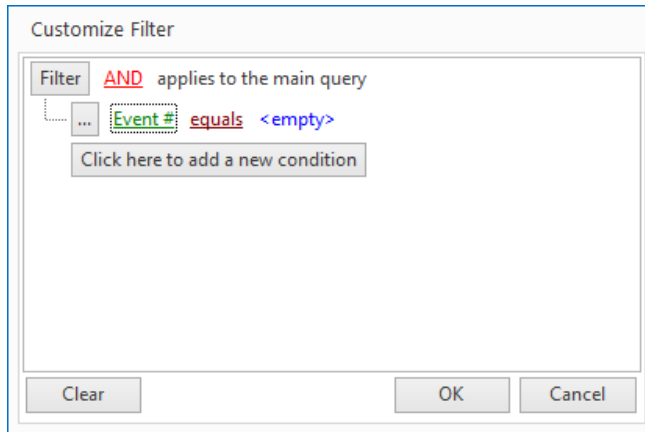
## Establishing a Custom Filter

1. Click the **Filter** button  , located on the right-hand side of the Notifications Setup window, in the **Condition** area.

**Result:** The Customize Filter Window opens.

2. Click the **Click here to add a new condition** button.

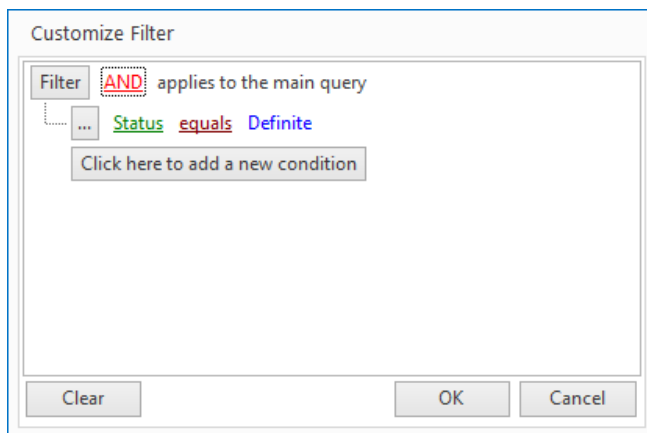
**Result:** A new group is created with the default first condition of "Event # equals <empty>."



3. Click the word **AND** in the line "AND applies to the main query" at the beginning of your new group.  
**Result:** A drop-down list of options appears.
4. Select the desired option: And, Or, Not And, Not Or. Refer to the table below for option descriptions.

Option	Description
<b>And</b>	This option means the records that result from this query must match the original criteria you set, and all of the criteria you create in this group.
<b>Or</b>	This option means the records that result from this query must match the original criteria you set, and any one of the criteria you set in this group - either the first condition in the group OR the second OR the third, etc.
<b>Not And</b>	This option means the records that result from this query must match the original criteria you set, but not all conditions in this group. They can match one or another, but NOT the first AND the second AND the third, etc.
<b>Not Or</b>	This option means the records that result from this query must match the original criteria you set, but not any of the conditions in this group - NOT the first condition in the group OR the second, etc.

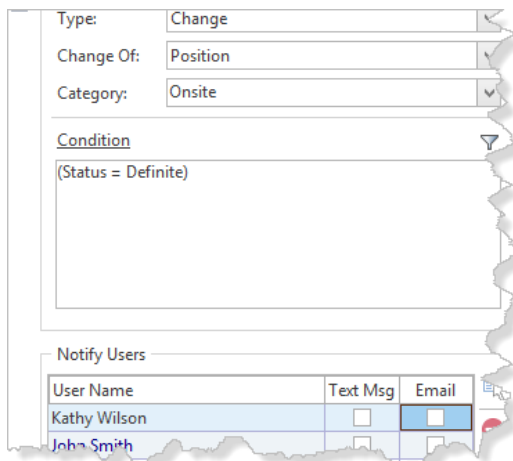
5. Click on the words **Event #** in the first condition of your new group and choose any condition from the drop-down list.  
**Result:** You are establishing the first criterion for your query.
6. Click the word "equals" next to your criterion and choose an option.  
**Result:** Your selection replaces the word "equals" in your condition.
7. Click the final word in the condition and choose a value for the condition to be compared to.  
**Note:** Click the **Click here to add a new condition** button to add additional filters.



The 'Customize Filter' dialog box contains a 'Filter' button, a red 'AND' operator, and the text 'applies to the main query'. Below this is a condition 'Status equals Definite' with a 'Click here to add a new condition' button. At the bottom are 'Clear', 'OK', and 'Cancel' buttons.

8. Click **OK**.

**Result:** The Filter name will display in the **Condition** area.



The form shows configuration for automatic change notifications. It includes dropdowns for 'Type' (Change), 'Change Of' (Position), and 'Category' (Onsite). The 'Condition' section displays '(Status = Definite)'. The 'Notify Users' section contains a table with columns for 'User Name', 'Text Msg', and 'Email'.

User Name	Text Msg	Email
Kathy Wilson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
John Smith	<input type="checkbox"/>	<input type="checkbox"/>

## Viewing/Managing Notifications

You can set an initial base query for your notifications for a particular day or date range, and optionally include notifications that have been viewed. The base query can be changed at any time.

1. Click the **Notifications** button from the **Main** sidebar.  
**Result:** A *User Notifications Base Query* window opens, where you can establish your default base query.  
**Note:** This window only appears the first time Notifications are accessed; however, you can easily change your base query, if desired.
2. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, or **Within Date Range**, or choose a **Relative Date Range** for the query.

3. Click into the **Viewed Notifications** checkbox if you want to include viewed notifications in your query.
4. **[Optional]** Click into the checkbox labeled **Don't Show Window** at the bottom left of the tool to have this window open automatically as soon as your query has been run.
5. Click **OK**.

**Result:** The *User Notifications* window opens.

**Tip:** If you are an Administrator, you can establish which users will be notified for each one.

## Unit 21: Creating Automatic Change Notifications

**User Notifications**

Select

Event #	Client	Changed On	Changed By
E00323	P S S	10/14/2015 (05:49 pm)	Kathy Wilson
E00111	Crow Wedding Reception	10/14/2015 (05:33 pm)	Kathy Wilson

Details

Changed On: 10/14/2015 (05:49 pm)  
 Changed By: Kathy Wilson  
 Notify: Kathy Wilson  
 Table: Events  
 Field: Category  
 Viewed On: 10/15/2015 (07:11 am)  
 Event #: E00323  
 Event Date: 10/13/2015  
 Status: Definite

Changed  
 Event #E00323 - Event Category changed from Group Sales to Social

(Date Range: 10/1/2015 - 10/31/2015) and (Include Viewed Notifications) and (User = Kathy Wilson)

**User Notifications**


Select

Event #	Client	Changed On	Changed By	Notify	Viewed On
286 - Event Event Date changed from 2015-07-30 to 2015-07-31	American Family Insurance	7/21/2015 (12:54 pm)	Default Administrator	Kathy Wilson	
286 - Event Event Date changed from 2015-07-30 to 2015-07-31	American Family Insurance	7/21/2015 (12:54 pm)	Default Administrator	Default Administrator	
458 - Event Event Date changed from 2015-07-29 to 2015-07-31	sunset Technologies	7/21/2015 (12:53 pm)	Default Administrator	Jo Ann Mulnix	
458 - Event Event Date changed from 2015-07-29 to 2015-07-31	sunset Technologies	7/21/2015 (12:53 pm)	Default Administrator	John Smith	
458 - Event Event Date changed from 2015-07-29 to 2015-07-31	sunset Technologies	7/21/2015 (12:53 pm)	Default Administrator	Kathy Wilson	
458 - Event Event Date changed from 2015-07-29 to 2015-07-31	sunset Technologies	7/21/2015 (12:53 pm)	Default Administrator	Kathy Wilson	

Event #  
 Client  
 Changed On  
 Changed By  
 Notify  
 Category  
 Table  
 Field  
 Viewed  
 Viewed On  
 Event Date  
 Status  
 Party Name  
 Sales Rep

3 of 5

**Note:** Both panes of this window are customizable. For example, you can collapse the **Details** section by clicking the **Display Full Grid** button and then clicking the **Show Change** button. You can also click the **Quick Column Customizing** button to add additional fields to the grid. (See image below.)

- To mark a notification as "Viewed," double-click a user name or click the **Mark as Viewed** button , located on the top right-hand side of the window.

**Tip:** To change your base query, click the **SQL** button, located at the bottom right-hand side of the window.

## Enabling/Disabling Notifications

Users will be notified of any new notifications as they occur. These notifications can be numerous; however, a **Notifications** tab has been added in Global Settings, where you can enable/disable program notifications.

(Access from **Administration > Settings > Global Settings > Notifications**.)

**Note:** "Pings" have been phased out of Global Settings.

View/Edit Catrease Global Settings

Default Settings

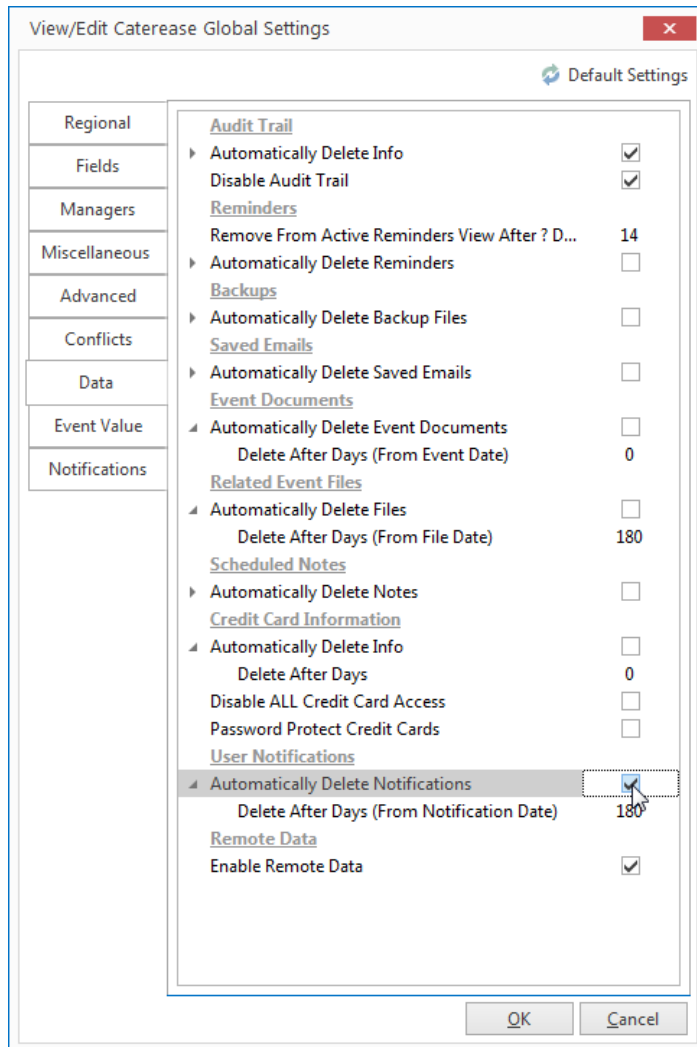
Regional	Enable Notifications For...
Fields	Events <input checked="" type="checkbox"/>
Managers	Sub-Events <input checked="" type="checkbox"/>
Miscellaneous	Food/Service Items <input checked="" type="checkbox"/>
Advanced	Shifts <input type="checkbox"/>
Conflicts	Payments <input type="checkbox"/>
Data	
Event Value	
Notifications	

OK Cancel

## Deleting Notifications Automatically

You can have Caterease automatically delete notifications after a specified period of time after the date of the notification, via the **Data** tab in Global Settings. Simply click into the **Automatically Delete Notifications** checkbox. You can establish a deletion date by typing the number of days from Notification Date into the field provided.

**Note:** This action will delete both Viewed and Un-Viewed Notifications.



## Using the Notifications Sidebar on the Backstage Tab

A Notifications pane has been added to the Backstage tab. This displays the current user's notifications as they occur. (Notification Details are located on the right-hand side, while a quick summary, grouped by date, is located on the left-hand side of the screen.)

The screenshot shows the CaterEase Backstage tab with the Notifications sidebar. The sidebar is titled 'Notifications' and includes a 'Show Viewed' checkbox, 'Mark', and 'Un-Mark' buttons. It displays 'Administrator Notifications' for 'Sunday, May 01, 2016'. The main content area shows details for a notification: 'Event #E00319 - Event Theme changed from Meeting to Banquet'.

Changed On	Changed
5/1/2016 (02:10 pm)	Event #E00319 - Event Theme changed from Meeting to Banquet

Notification Details:

- Changed On: 5/1/2016 (02:10 pm)
- Changed By: Administrator
- Name:
- Table Name: Events
- Field Name: Theme
- Viewed On:
- Event #: E00319
- Event Date: 4/30/2016
- Status: Definite
- Client: Gustave A. Larson Company
- Party Name: Company Luncheon
- Theme: Banquet
- Sales Rep: Roxanne M. Mc Namer
- Business Type: Drop-Off
- Changed: Event #E00319 - Event Theme changed from Meeting to Banquet



## Unit 22: Creating Event Prints in Print Designer

In this section, you will learn:

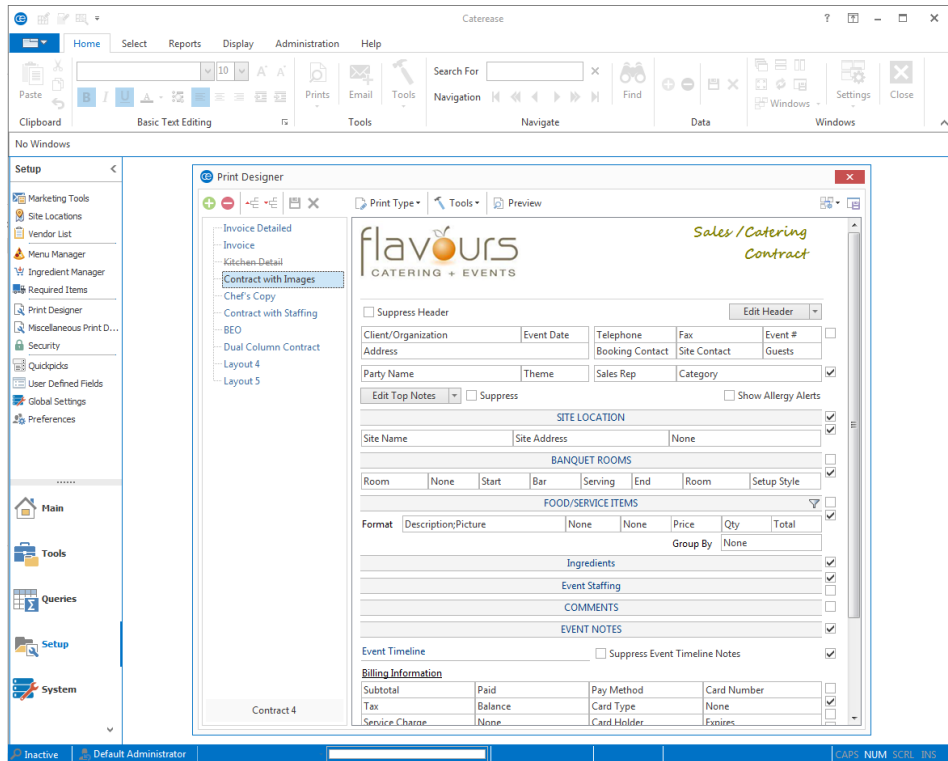
- Accessing Print Designer
- Adding a New Print
- Selecting a Print Layout
- Editing the Header or Footer of a Print
- Selecting Fields on the Print
- Customizing and Suppressing General Information
- Editing Top and Bottom Notes Sections
- Changing Print Fonts



# Accessing the Print Designer

1. Click the **Setup** sidebar group on the left-hand side of your Caterase screen.
2. Click the **Print Designer** button.

**Result:** The *Print Designer* window opens.



## Adding a New Print

1. Click the **Add Print** button , located at the top left-hand side of the Print Designer window.

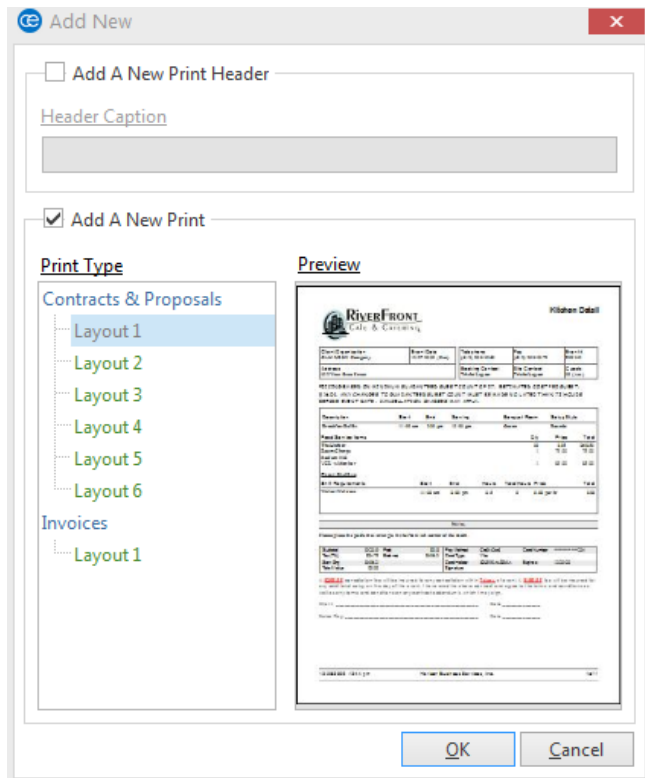
**Result:** A confirmation message appears.

2. Click **Yes** to confirm your choice.

**Result:** The Add New (Print Layout) window opens.

3. Click into the **Add A New Print** checkbox (if it is not already selected).

**Tip:** You can drag and drop titles into different positions on the list, as well. This will affect their positions in your Prints menu.



4. Click on a Layout on the left-hand side of the window to select it.

**Note:** You can also create a sub-menu. See "Selecting a Print Layout."

5. Click **OK**.

**Result:** A new print is added to the bottom of your prints list, and "New Print" is highlighted for you to type in a new print title.

6. Type a title for your new print.

7. Press **[Enter]** to save your changes.

**Note:** This is the title that will appear in your **Prints** drop-down menu. In other words, this is the title you will select to generate this print.

## Selecting a Print Layout

In all Print Layouts (except Invoice), you can do the following:

- Customize the header, footer, and top and bottom notes sections, including logo, title, dynamic merge fields, etc.
- Move or remove specific details within the confines of the print layout, e.g., move “Sales Rep” to another spot, remove pricing information from the menu section, etc.
- Include or suppress details, such as allergy information; site location information; room and time information; menu information; ingredients (not available in Layout 1); staffing; sub-event comments; event notes; timeline; financial totals; payment details; future deposit schedule; and custom notes, to act as terms and conditions.
- Filter the menu section, allowing you to create a print that only displays food, for example, or that separates appetizers from entrees, etc.

Note: See Appendix A to view samples of the available layouts.

### Layout Description Table

Layout	Description
<b>Layout 1</b>	Shows the details of each sub-event of a party (times, venue, menu, comments/requests, staffing) in separate boxes in the middle of the print. All other layouts group all venues/times together, all menu items together, all staffing together, etc. (Also, this layout does not allow inclusion of ingredients.)
<b>Layout 2</b>	Shows general event information in two columns at the top of the print, as opposed to in rows of boxes (as in all other layouts).
<b>Layout 3</b>	Separates menu items for all sub-events into two sides of the print: half on the left and half on the right. Filters can be established to determine which items appear on which side of the print.
<b>Layout 4</b>	Does not display details on the left and right sides of the print separately.
<b>Layout 5</b>	Separates menu items on the left and right sides of the print, as in Layout 3, above. Also, shows sub-event venues/times on the right and sub-event comments on the left.
<b>Layout 6</b>	Separates menu items on the left and right sides of the print, as in Layout 3, above. Also, shows sub-event venues/times on the right, sub-event comments on the left, bottom notes (terms and conditions) on the bottom left, and financial details on the bottom right.
<b>Invoice Layout 1</b>	Designed in an “invoice” format rather than in a detailed “contract” format. Lets you show menu item details in a centered list or include a breakdown of general finances (food totals, beverage totals, etc.), or both. Also, lets you decide whether or not to include items without values from the event.



## Layout 1

Client Schad Associates	Event Date 9/3/2016 (Sat)	Telephone (612) 944-2153	Fax (612) 944-0000	Event # E00463
Address 10230 Tarn Circle	Booking Contact Norma Schad	Site Contact Norma Schad	Guests 50 (Pln)	

ANY CHANGES TO GUARANTEED GUEST COUNT MUST BE MADE NO LATER THAN 72 HOURS BEFORE EVENT DATE. CANCELLATION CHARGES MAY APPLY.

Venue						
Description	Type	Start	End	Serving	Room	Setup Style
Meeting	On-Premise	4:00 pm	5:00 pm	NA	Sea	Classroom
Food/Service Items						
Food/Service Items					Price	Qty
Wood Grain Podium					\$25.00	1
Projection Screen					\$10.00	1
Comments						
Group to move to Sand room for dinner following meeting.						

Venue						
Description	Type	Start	End	Serving	Room	Setup Style
Dinner Served	On-Premise	6:00 pm	7:30 pm	6:00 pm	Sand	Banquet
Food/Service Items						
Food/Service Items					Price	Qty
Chilled Jumbo Shrimp Cocktail - per 100					\$80.00	2
Filet with Balsamic Glaze					\$31.95	50
8 oz. filet browned and cooked in a red wine balsamic glaze for the perfect taste.						
Comments						
Client will arrive an hour early to help set-up decoration.						

Subtotal	\$2,017.50	Paid	\$1,000.00	Pay Method	Credit Card	Card Number
Tax	\$141.23	Balance	\$1,475.93	Card Type		Expires
Service Charge	\$317.20			Card Holder		
Total Value	\$2,475.93			Signature		

A **\$200.00** cancellation fee will be incurred for any cancellation within **7 days** of event. A **\$100.00** fee will be incurred for any additional setup on the day of the event. I have read the above contract and agree to the terms and conditions.

Client: \_\_\_\_\_

Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_

Date: \_\_\_\_\_



## Layout 2

Client Schad Associates  
 Party Name Schad Associates  
 Address 10230 Tarn Circle  
 Telephone (612) 944-2153  
 Fax (612) 944-0000  
 Sales Rep John Smith

Event Date 9/3/2016 (Sat)  
 Event # E00463  
 Guests 50 (Pln)  
 Booking Contact Norma Schad  
 Site Contact Norma Schad  
 Theme Banquet

**ANY CHANGES TO GUARANTEED GUEST COUNT MUST BE MADE NO LATER THAN 72 HOURS BEFORE EVENT DATE. CANCELLATION CHARGES MAY APPLY.**

Venue						
Description	Type	Start	End	Serving	Room	Setup Style
Meeting	On-Premise	4:00 pm	5:00 pm	NA	Sea	Classroom
Dinner Served	On-Premise	6:00 pm	7:30 pm	6:00 pm	Sand	Banquet

Food/Service Items				Price	Qty	Total
Food/Service Items						
Meeting - 9/3/2016 - 4:00 pm						
Wood Grain Podium				\$25.00	1	\$25.00
Projection Screen				\$10.00	1	\$10.00
Dinner Served - 9/3/2016 - 6:00 pm						
Chilled Jumbo Shrimp Cocktail - per 100				\$80.00	2	\$160.00
Filet with Balsamic Glaze				\$31.95	50	\$1,597.50
8 oz. filet browned and cooked in a red wine balsamic glaze for the perfect taste.						

Comments	
Meeting - 9/3/2016 - 4:00 pm	
Group to move to Sand room for dinner following meeting.	
Dinner Served - 9/3/2016 - 6:00 pm	
Client will arrive an hour early to help set-up decoration.	

Subtotal	\$2,017.50	Paid	\$1,000.00	Pay Method	Credit Card	Card Number
Tax	\$141.23	Balance	\$1,475.93	Card Type		Expires
Service Charge	\$317.20			Card Holder		
Total Value	\$2,475.93			Signature		

A **\$200.00** cancellation fee will be incurred for any cancellation within **7 days** of event. A **\$100.00** fee will be incurred for any additional setup on the day of the event. I have read the above contract and agree to the terms and conditions.

Client: \_\_\_\_\_

Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_

Date: \_\_\_\_\_



## Layout 3

Client Schad Associates	Event Date 9/3/2016 (Sat)	Telephone (612) 944-2153	Fax (612) 944-0000	Event # E00463
Address 10230 Tarn Circle		Booking Contact Norma Schad	Site Contact Norma Schad	Guests 50 (Pln)

ANY CHANGES TO GUARANTEED GUEST COUNT MUST BE MADE NO LATER THAN 72 HOURS BEFORE EVENT DATE. CANCELLATION CHARGES MAY APPLY.

				Venue			
Description	Type	Start	End	Serving	Room	Setup Style	
Meeting	On-Premise	4:00 pm	5:00 pm	NA	Sea	Classroom	
Dinner Served	On-Premise	6:00 pm	7:30 pm	6:00 pm	Sand	Banquet	
Food & Beverage				Equipment/Miscellaneous			
Food/Service Items	Price	Qty	Total	Food/Service Items	Price	Qty	Total
Dinner Served - 9/3/2016 - 6:00 pm				Meeting - 9/3/2016 - 4:00 pm			
Chilled Jumbo Shrimp Cocktail - per 100	\$80.00	2	\$160.00	Wood Grain Podium	\$25.00	1	\$25.00
Filet with Balsamic Glaze 8 oz. filet browned and cooked in a red wine balsamic glaze for the perfect taste.	\$31.95	50	\$1,597.50	Projection Screen	\$10.00	1	\$10.00
Comments							

Meeting - 9/3/2016 - 4:00 pm

Group to move to Sand room for dinner following meeting.

Dinner Served - 9/3/2016 - 6:00 pm

Client will arrive an hour early to help set-up decoration.

Subtotal	\$2,017.50	Paid	\$1,000.00	Pay Method	Credit Card	Card Number
Tax	\$141.23	Balance	\$1,475.93	Card Type		Expires
Service Charge	\$317.20			Card Holder		
Total Value	\$2,475.93			Signature		

A **\$200.00** cancellation fee will be incurred for any cancellation within **7 days** of event. A **\$100.00** fee will be incurred for any additional setup on the day of the event. I have read the above contract and agree to the terms and conditions.

Client: \_\_\_\_\_

Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_

Date: \_\_\_\_\_



## Layout 4

Client Schad Associates	Event Date 9/3/2016 (Sat)	Telephone (612) 944-2153	Fax (612) 944-0000	Event # E00463
Address 10230 Tarn Circle		Booking Contact Norma Schad	Site Contact Norma Schad	Guests 50 (Pln)

**ANY CHANGES TO GUARANTEED GUEST COUNT MUST BE MADE NO LATER THAN 72 HOURS BEFORE EVENT DATE. CANCELLATION CHARGES MAY APPLY.**

Venue						
Description	Type	Start	End	Serving	Room	Setup Style
Meeting	On-Premise	4:00 pm	5:00 pm	NA	Sea	Classroom
Dinner Served	On-Premise	6:00 pm	7:30 pm	6:00 pm	Sand	Banquet

Food/Service Items				Price	Qty	Total
Food/Service Items						
Meeting - 9/3/2016 - 4:00 pm						
<b>Wood Grain Podium</b>				\$25.00	1	\$25.00
<b>Projection Screen</b>				\$10.00	1	\$10.00
Dinner Served - 9/3/2016 - 6:00 pm						
<b>Chilled Jumbo Shrimp Cocktail - per 100</b>				\$80.00	2	\$160.00
<b>Filet with Balsamic Glaze</b>				\$31.95	50	\$1,597.50
<i>8 oz. filet browned and cooked in a red wine balsamic glaze for the perfect taste.</i>						

Comments	
Meeting - 9/3/2016 - 4:00 pm	
Group to move to Sand room for dinner following meeting.	
Dinner Served - 9/3/2016 - 6:00 pm	
Client will arrive an hour early to help set-up decoration.	

Subtotal	\$2,017.50	Paid	\$1,000.00	Pay Method	Credit Card	Card Number
Tax	\$141.23	Balance	\$1,475.93	Card Type		Expires
Service Charge	\$317.20			Card Holder		
Total Value	\$2,475.93			Signature		

A **\$200.00** cancellation fee will be incurred for any cancellation within **7 days** of event. A **\$100.00** fee will be incurred for any additional setup on the day of the event. I have read the above contract and agree to the terms and conditions.

Client: \_\_\_\_\_

Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_

Date: \_\_\_\_\_



## Layout 5

Client Schad Associates	Event Date 9/3/2016 (Sat)	Telephone (612) 944-2153	Fax (612) 944-0000	Event # E00463
Address 10230 Tarn Circle		Booking Contact Norma Schad	Site Contact Norma Schad	Guests 50 (Pln)

ANY CHANGES TO GUARANTEED GUEST COUNT MUST BE MADE NO LATER THAN 72 HOURS BEFORE EVENT DATE. CANCELLATION CHARGES MAY APPLY.

Food & Beverage				Equipment/Miscellaneous			
Food/Service Items	Price	Qty	Total	Food/Service Items	Price	Qty	Total
Dinner Served - 9/3/2016 - 6:00 pm				Meeting - 9/3/2016 - 4:00 pm			
<b>Chilled Jumbo Shrimp Cocktail</b> - per 100	\$80.00	2	\$160.00	<b>Wood Grain Podium</b>	\$25.00	1	\$25.00
<b>Filet with Balsamic Glaze</b> 8 oz. filet browned and cooked in a red wine balsamic glaze for the perfect taste.	\$31.95	50	\$1,597.50	<b>Projection Screen</b>	\$10.00	1	\$10.00

Comments		Venue				
Meeting - 9/3/2016 - 4:00 pm		Room	Setup Style	Start	Serving	End
Group to move to Sand room for dinner following meeting.		Sea	Classroom	4:00 pm	NA	5:00 pm
Dinner Served - 9/3/2016 - 6:00 pm		Sand	Banquet	6:00 pm	6:00 pm	7:30 pm
Client will arrive an hour early to help set-up decoration.						

Subtotal	\$2,017.50	Paid	\$1,000.00	Pay Method	Credit Card	Card Number
Tax	\$141.23	Balance	\$1,475.93	Card Type		Expires
Service Charge	\$317.20			Card Holder		
Total Value	\$2,475.93			Signature		

A **\$200.00** cancellation fee will be incurred for any cancellation within **7 days** of event. A **\$100.00** fee will be incurred for any additional setup on the day of the event. I have read the above contract and agree to the terms and conditions.

Client: \_\_\_\_\_

Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_

Date: \_\_\_\_\_



## Layout 6

Client Schad Associates	Event Date 9/3/2016 (Sat)	Telephone (612) 944-2153	Fax (612) 944-0000	Event # E00463
Address 10230 Tarn Circle		Booking Contact Norma Schad	Site Contact Norma Schad	Guests 50 (Pln)

**ANY CHANGES TO GUARANTEED GUEST COUNT MUST BE MADE NO LATER THAN 72 HOURS BEFORE EVENT DATE. CANCELLATION CHARGES MAY APPLY.**

Food & Beverage				Equipment/Miscellaneous			
Food/Service Items	Price	Qty	Total	Food/Service Items	Price	Qty	Total
Dinner Served - 9/3/2016 - 6:00 pm				Meeting - 9/3/2016 - 4:00 pm			
<b>Chilled Jumbo Shrimp Cocktail</b> - per 100	\$80.00	2	\$160.00	<b>Wood Grain Podium</b>	\$25.00	1	\$25.00
<b>Filet with Balsamic Glaze</b> 8 oz. filet browned and cooked in a red wine balsamic glaze for the perfect taste.	\$31.95	50	\$1,597.50	<b>Projection Screen</b>	\$10.00	1	\$10.00

Comments		Venue			
		Room	Setup Style	Start	Serving End
Meeting - 9/3/2016 - 4:00 pm		Sea	Classroom	4:00 pm	NA 5:00 pm
Group to move to Sand room for dinner following meeting.		Sand	Banquet	6:00 pm	6:00 pm 7:30 pm
Dinner Served - 9/3/2016 - 6:00 pm					
Client will arrive an hour early to help set-up decoration.					

#### Terms & Conditions

A **\$200.00** cancellation fee will be incurred for any cancellation within **7 days** of event. A **\$100.00** fee will be incurred for any additional setup on the day of the event. I have read the above contract and agree to the terms and conditions.

#### Financial Information

Subtotal	\$2,017.50	Paid	\$1,000.00
Tax	\$141.23	Balance	\$1,475.93
Service Charge	\$317.20		
Total Value	\$2,475.93		

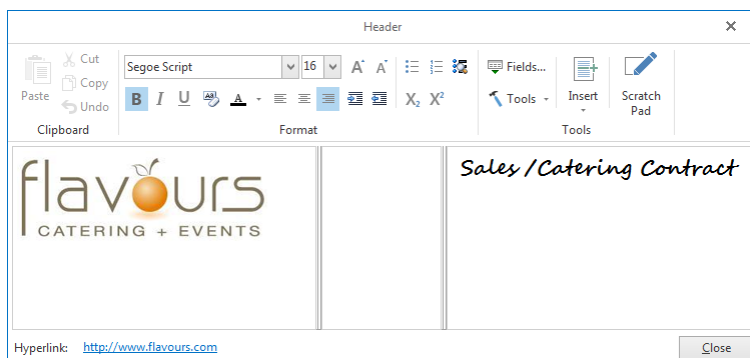
Client: \_\_\_\_\_ Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_ Date: \_\_\_\_\_


## Editing the Header or Footer of a Print

1. In Print Designer, click the **Edit Header** (top right) or **Edit Footer** (bottom left) button.

**Result:** The Header or Footer window opens, with three panes to optionally separate information.



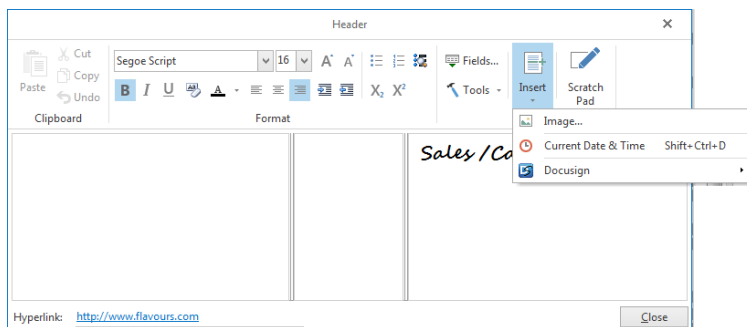
**Tip:** You can copy an entire header or even individual sections to all your other Print Designer prints by clicking the down arrow to the right of the **Edit Header** button on the Print Designer screen and selecting the specific part (Entire Header, Left, Center, or Right) you want to copy. Also, be sure to use the Print Type field at the bottom right of Print Designer to identify this print as a "Contract," "Invoice," or "BEO." This way, CaterEase can automatically keep track of the date you generate each print.

2. **[Optional]** Stretch or shrink any pane by holding your left mouse button down on the inside frame and dragging left or right.  
**Note:** You can also set all three panes to equal widths by clicking the **Tools** button at the top of the Header/Footer window and choosing **Set Equal Widths**.
3. Click into any pane and type as desired, using the toolbar at the top of the window to format text, center, or right-justify, etc.
4. **[Optional]** Insert images (logos, pictures, etc.), by clicking the **Insert** button at the top of the window and choosing **Image**, then browsing to the image you want to insert.  
**Note:** Images can be placed into any pane in the Header/Footer, and can be justified (left, center, right) just like text. Previously placed images can be saved to your hard drive by right-clicking and choosing **Save to File**.
5. **[Optional]** Insert merge fields (to dynamically merge information from the event, such as the event number, revised date, etc.), by clicking the **Fields** button , located at the top of the window, expanding a category of fields, then double-clicking a specific field.
6. **[Optional]** Click in the Hyperlink field at the bottom of the Header/Footer window and enter a URL (web address) to attach to this areas of the print.  
**Note:** When you e-mail this print, the recipient can click any part of this header or footer and be sent to the designated web address.
7. **[Optional]** Adjust the desired height for your Footer by clicking the up-and-down arrows to increase or decrease the height, respectively.  
**Note:** Footer heights can range from .5" through 3" (or 1 cm through 8 cm if Metric has been enabled in your Global Settings).

## Adding an Image/Logo to the Header

A logo is the identifying element for the brand of a company, and is designed to create immediate recognition. Adding your company logo to a print could not be easier.

1. From a print in Print Designer or Miscellaneous Print Designer, click the **Edit Header** button.
2. Click on the pane within the header where you would like your logo/image to appear.
3. Click the **Insert** button, located at the top of the Header window, and select **Image**.  
***Note:** Alternatively, you may right-click inside the pane and choose **Insert > Image**.*



4. Browse to the image you want to insert.
5. Double-click the image to insert it into the pane.  
***Note:** Images can be justified (left, right) or centered, just like text.*
6. Click the **Close** button to close the window.

## Inserting Merge Fields into the Header

Merge fields are dynamic fields that automatically merge specific information from a particular customer or event. For example, you could type the words "Last Revised On:" followed by a merge field that pulls an event's revision date. Then, when you generate that print from any event, the merge field will automatically insert the specific revision date of that particular party. It's a great way to make your various prints look custom-created each time you generate them.

1. In Print Designer, click the **Edit Header** button.

**Result:** The Header window opens.

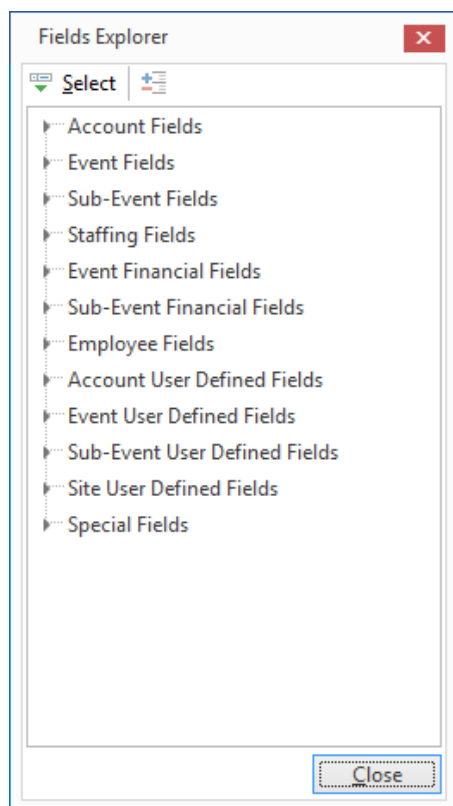
2. Click on the pane within the header where you would like your merge fields to appear.

3. Type any text you want to precede your merge field.

**Note:** You may want to identify the merge field for the person reading the print; for example, "Revised Date," "Party Name," etc.

4. Click the **Fields** button , located towards the top right-hand side of the text window.


**Result:** The Fields Explorer window opens.



5. Click the expand button (triangle) to the left of the group of merge fields you want to access.

**Result:** The selected group expands, showing all related merge fields.

**Note:** As an option, click the **Full Expand** button , located at the top of the Fields Explorer window, to expand all categories of merge fields at once.

6. Select the field you want to insert, and either double-click it or drag and drop it into the text window.  
**Result:** *Double-clicking a merge field inserts it where the cursor currently resides, whereas dragging and dropping a field allows you to place it anywhere.*
7. Continue this process until you have entered all of your desired merge fields.
8. Close the window, and then click the **Save Changes** icon  on the subsequent screen.

## Customizing and Suppressing General Information

1. In the Print Designer window, click the down arrow to the right of any field in a print to choose a different detail to appear there.

**Note:** General event details, site location information, venue and time details, etc., can be removed or rearranged in this way.

**Tip:** Be sure to use the Print Type field at the bottom right of Print Designer to identify this print as a "Contract," "Invoice," or "BEO." This way, Caterbase can automatically keep track of the date you generate each print. For more information, see "Identifying the Print Type for the Program," in Unit 5.

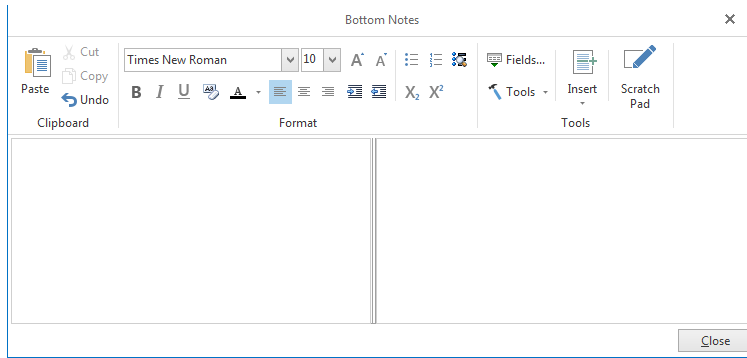
The screenshot shows the 'Print Designer' window for 'flavours CATERING + EVENTS'. The left sidebar lists various print types, with 'Invoice' selected. The main preview area shows a 'Sales/Catering Contract' with fields for Address, Event Date, Telephone, Fax, Event #, Booking Contact, Site Contact, Guests, Party Name, Theme, Sales Rep, and Category. A dropdown menu is open over the 'Summary' section, showing a list of fields that can be selected to replace the current content. The 'Print Type' field at the bottom right is set to 'Contract'.


2. Choose to suppress various sections of the print by clicking the corresponding checkbox, most of which are located along the right-hand side of the Print Designer window, next to a specific section of a print.  
**Note:** Float your mouse pointer over any checkbox for a tool tip identifying its corresponding section; in most cases, a check in a box causes a section to be suppressed on the print.
3. [Optional] Click into the gray "heading" box of any section and type a different heading, if desired.

## Editing Top and Bottom Notes Sections

1. In Print Designer, click the **Edit Top Notes** (top left) or **Edit Bottom Notes** (bottom left) button.

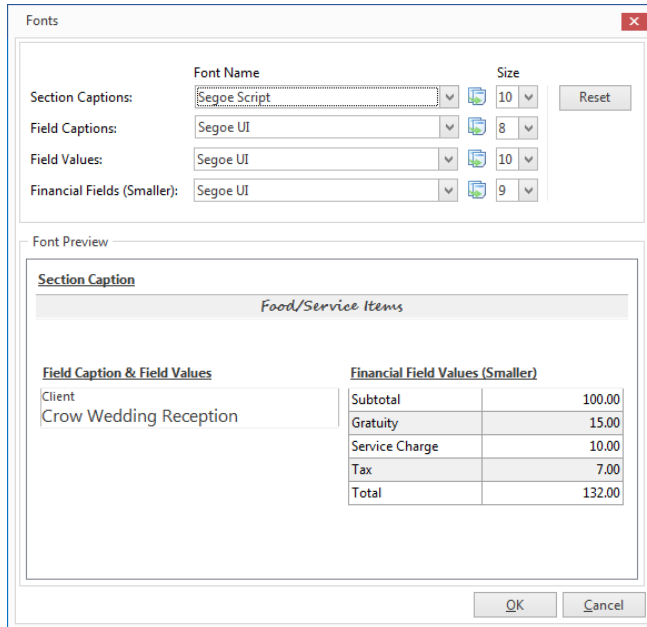
**Result:** The text block for the selected section appears, with two panes to optionally separate information.



2. **[Optional]** Stretch or shrink either pane by holding your left mouse button down on the inside frame and dragging left or right.  
**Note:** You can drag this frame all the way to one side if you only want one pane of information. You can also set the panes to equal widths by clicking the **Tools** button at the top of the window and choosing **Set Equal Widths**.
3. Click into either pane and type as desired, using the toolbar at the top of the window to format text, center or right-justify, etc.
4. **[Optional]** Insert images (logos, etc.) by clicking the **Insert** button at the top of the window and choosing **Image**, then browsing to the image you want to insert.  
**Note:** Images can be placed into either pane, and can be justified (left, center, right) just like text. Previously placed images can be saved to your hard drive by right-clicking and choosing **Save to File**.
5. **[Optional]** Insert merge fields (to dynamically merge information from the event, such as the event number, revised date, etc.), by clicking the **Fields** button  at the top of the window, expanding a category of fields and then double-clicking a specific field.

## Changing Print Fonts

1. Click the **Tools** button at the top of the Print Designer window and choose **Print Fonts**.  
**Result:** *The Fonts window opens.*



2. Choose a different font style and/or size for various areas of the print.  
**Note:** *The **Font Preview** section at the bottom of the window will update to reflect your changes.*
3. When finished, click **OK**.  
**Result:** *The Font window changes, but the preview in Print Designer will NOT reflect your new font selections.*  
**Note:** *To review your new fonts, save the print and click the **Preview** button at the top of the Print Designer window. (Remember, you must have an event open in Event Manager in order to preview a print.)*

## Unit 23: Creating Merge Documents in Marketing Tools

In this section, you will learn:

- Adding a New Merge Document
- Adding Merge Fields to a Document
- Using Formatted Date Fields
- Inserting a Table into a Document
- Using Merge Tables to Insert Menu Items, Payments, Etc.
- Using Nested Tables to Arrange Information in a Document



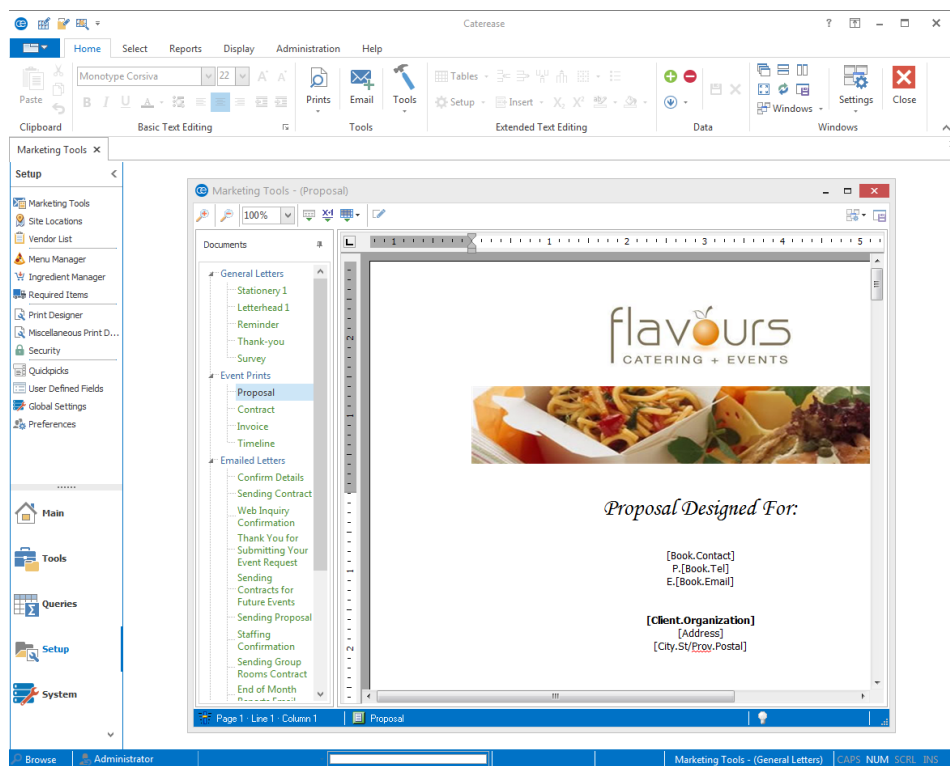
## Adding a New Document or Envelope


1. Click the **Setup** sidebar on the left-hand side of your screen and choose **Marketing Tools**.

**Result:** The Marketing Tools window opens.

**Note:** As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Prints > Marketing Tools**.


**Tip:** For long lists of merge documents, see "Organizing Documents into Groups."



2. Click the **Add Record** button , located in the **Home** ribbon tab at the top of your screen.  
**Result:** A confirmation prompt appears.
3. Click **Yes** to confirm your choice.  
**Result:** A new blank document is added to the bottom of your **Documents** list, with your cursor positioned in the **"New Document"** field.
4. Type a name for your new document and press your **[Enter]** key.  
**Result:** Your new document name is saved.
5. Click into the blank document and type as desired, inserting merge fields as described in subsequent topics.
6. **[Optional]** Click the **Setup** button in the **Home** ribbon tab at the top of your screen and choose **Page Setup** to change paper size, margins, and orientation (for envelopes or other custom documents).  
**Note:** "Landscape" orientation is typically preferable for envelopes.

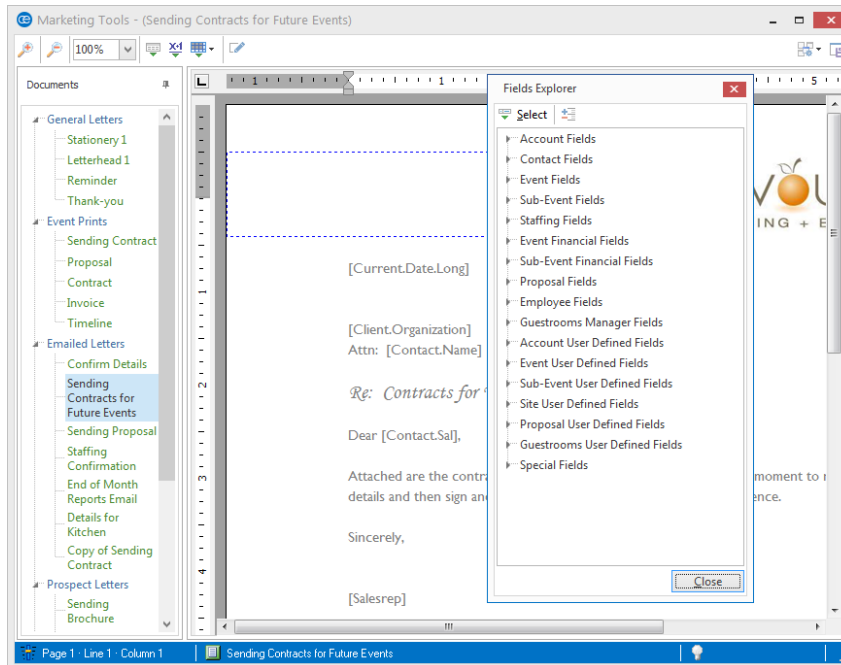
## Adding Merge Fields to a Document

1. Click into a Marketing Tools document.

2. Click the **Insert Merge Fields** button  , located on the upper left-hand side of the window. (Or you may access this button from the **Tools** menu at the top of your screen, in the **Home** ribbon tab.)


**Result:** The *Fields Explorer* window opens.

**Note:** If you plan to insert several merge fields, you may want to leave this window open and even drag it out of the way so you can see your print underneath.



3. Click the expand button to the left of a particular category of fields, e.g., Event Fields, Financial Fields, etc., to expand the fields.

**Result:** The selected category opens to show all related fields.


**Note:** As an option, click the **Full Expand** button  , located at the top of the Fields Explorer window, to expand all categories of merge fields at once.

4. Select a merge field, and insert in one of the following ways:

- Hold your left mouse button down on the field, drag it into any position on your document, envelope, or comments/notes section, and release.
- Double-click the selected field to drop it in the current cursor position (where your cursor is currently positioned).
- Click the **Select** button to drop the field in the current cursor position.

**Note:** Comments and notes that have been typed into text blocks within your Event Manager can also be included as merge fields, by selecting *Comments (Unformatted)*, *Event Notes (Unformatted)*, *Site Directions (Unformatted)*, etc.

## Using Formatted Date Fields

1. Click inside the document to place your cursor where you want the merge field to be inserted.
2. Click the **Insert Merge Fields** button , located on the upper left-hand side of your screen. (Or you may access this button from the **Tools** menu at the top of your screen, in the **Home** ribbon tab.)
3. Click the expand button to the left of Event Fields (for Event Date Formatted or Booked Date Formatted) or Special Fields (for Current Date Formatted).
4. Select the desired merge field, and insert it in one of the following ways:
  - Double-click the selected merge field to drop it into the current cursor position (where your cursor currently resides).
  - Hold your left mouse button down on the field, drag it into any position on your document, envelope, or comments/notes section, and release.
  - Click the **Select** button to drop the merge field into the current cursor position.
5. Format the date field by editing the “mmmm,” “d,” “y,” and number within the brackets, using the options listed in the table below.

Symbol	Description
<b>d</b>	Displays the date as a number without a leading zero (1-31).
<b>dd</b>	Displays the date as a number with a leading zero (01-31).
<b>ddd</b>	Displays the day as an abbreviation (Sun-Sat).
<b>dddd</b>	Displays the day as a full word (Sunday-Saturday).
<b>m</b>	Displays the month as a number without a leading zero (1-12).
<b>mm</b>	Displays the month as a number with a leading zero (01-12).
<b>mmm</b>	Displays the month as an abbreviation (Jan-Dec).
<b>mmmm</b>	Displays the month as a full name (January-December).
<b>y</b>	Displays the year as a four-digit number.
<b>(0)</b>	Change this number to add or subtract days from the merged date. (A positive number will add days; a negative number will subtract days.)

## Available Merge Fields

The following fields are available to be inserted anywhere in merge documents (created in Marketing Tools), or in various text boxes available on prints created in Print Designer and Miscellaneous Print Designer.

### Account Merge Fields

Use the following merge fields to pull information pertaining to your customers:

Field	Description
<b>Client/Organization</b>	Merges in the name of customer holding the currently selected event.
<b>Address</b>	Merges in the selected customer's address.
<b>Address 2</b>	Merges in the selected customer's secondary address, if one has been added to the Address (Other) field. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>City</b>	Merges in the selected customer's city.
<b>St/Prov</b>	Merges in the state or province the selected customer is from.
<b>Postal</b>	Merges in the selected customer's postal/ZIP code.
<b>City, St/Prov Postal</b>	Merges in these three details in City, State/Province, ZIP Code order. This field eliminates the need to select each field separately when they are commonly used in conjunction with one another (in letters and such).
<b>Telephone</b>	Merges in the selected customer's telephone number.
<b>Fax</b>	Merges in the selected customer's fax number.
<b>Reference</b>	Merges in the reference that is attached to the customer. <i>Note: This is different from the reference that is attached to an event reference; this reference is entered into the account details, and indicates how this customer originally heard of your company.</i>
<b>Sales Rep</b>	Merges in the sales representative who is associated with this account. <i>See note under Reference, above.</i>
<b>Sales Rep Telephone</b>	Merges in the telephone number associated with the sales representative who is associated with this account. <i>See note under Reference, above.</i>
<b>Sales Rep Cellular</b>	Merges in the cell phone number associated with the selected account's sales representative. <i>See note under Reference, above.</i>
<b>Sales Rep Email</b>	Merges in the e-mail address associated with the selected account's sales representative. <i>See note under Reference, above.</i>
<b>Category</b>	Merges in the category (e.g., "Corporate," "Educational," "Government," etc.), that is associated with the selected account. This is a quickpick list you can customize for tracking your customers. <i>See note under Reference, above.</i>
<b>Description</b>	Merges in this customer's description (e.g., "Association Member," "Chamber Member," etc.). This is a quickpick list you can customize for tracking your customers.
<b>Email</b>	Merges in the customer's e-mail address. <i>Note: This is the address attached to the customer itself, such as info@acme.com, <b>not</b> to a particular contact person.</i>
<b>Website</b>	Merges in the customer's web address. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>Cellular</b>	Merges in the cell phone number on file for this customer.
<b>Group</b>	Merges in the group of this customer. This is a quickpick list you can customize and use to group related customers together. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>Account #</b>	Merges in the account number automatically assigned to this customer by the program. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen. You can establish a unique prefix for these numbers up to three characters long (through <b>Administration &gt; Settings &gt; Global Settings &gt; Managers</b>).</i>
<b>Account ID #</b>	Merges in this customer's Account ID #. This is a field you can customize. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>Loyalty #</b>	Merges in the loyalty number associated with the client. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>

## Contact Merge Fields

Use the following merge fields to pull information pertaining to the primary (first) contact person listed for a customer:

**Note:** To include information pertaining to the contact person of an event, use the *Booking/Site Contact* merge details under "Event Fields."

Field	Description
<b>Name</b>	Merges in the first name and last name of the primary (first) contact associated with the client.
<b>Last</b>	Merges in the last name <b>only</b> of the primary contact associated with the client.
<b>First</b>	Merges in the first name <b>only</b> of the primary contact associated with the client.
<b>Title</b>	Merges in the title of the primary (first) contact associated with the client; e.g., "Owner," "General Manager," etc. This is a quickpick list you can customize.
<b>Salutation</b>	Merges in the salutation of the primary (first) contact associated with the client; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. <i>Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.</i>
<b>Address</b>	Merges in the address of the primary (first) contact associated with the client.
<b>Address 2</b>	Merges in the second address of the primary (first) contact associated with the client, if a second address has been entered into the Address (Other) field.
<b>City, St/Prov Postal</b>	Merges in these three details of the primary (first) contact in this order; meant to eliminate the need to select each field separately when they are commonly used in combination (in letters and such).

## Event Merge Fields

Use the following merge fields to pull information pertaining to an event:

Field	Description
<b>Event Date (Long)</b>	Merges in the date the event is being held in the format established by your computer's Regional Settings, usually set up as "Saturday, August 29, 2015."
<b>Event Date (Short)</b>	Merges in the date the event is being held in the format established by your computer's Regional Settings, usually set up as "August 29, 2015."
<b>Event Date</b>	Merges in the date the event is being held, in the format "8/29/2015."
<b>Event Date Formatted</b>	Merges in the date of the event and allows you to format it any way you want.
<b>Event Weekday</b>	Merges in the full name of the day of the week that the event takes place, in the format "Sunday," "Monday," etc.
<b>Event Weekday (Abbr)</b>	Merges in the first three letters of the day of the week that the event takes place, in the format "Sun," "Mon," etc.
<b>Event Month</b>	Merges in the full month name that the event takes place, in the format "August," "September," etc.
<b>Event Month (Abbr)</b>	Merges in the first three letters of the month that the event takes place, in the format "Aug," "Sep," etc.
<b>Event Begin Date</b>	Merges in the date of the event's earliest sub-event.
<b>Event End Date</b>	Merges in the date of the event's latest sub-event.
<b>Event Begin Time</b>	Merges in the overall event's start time.
<b>Event End Time</b>	Merges in the overall event's end time.
<b>Event Status</b>	Merges in the status of the event, e.g., Prospective, Tentative, Definite, etc.
<b>Planned Guests</b>	Merges in the planned guest count of the event.
<b>Actual Guests</b>	Merges in the actual guest count of the event.
<b>Guaranteed Guests</b>	Merges in the guaranteed guest count of the event.
<b>Party Name</b>	Merges in the party name of the event. e.g., "Smith Wedding Reception," "Jones Birthday Party," etc.
<b>Booking Contact</b>	Merges in the first name and last name of the booking contact of the event.
<b>Booking Contact First</b>	Merges in the first name of the booking contact of the event.

Field	Description
<b>Booking Contact Last</b>	Merges in the last name of the booking contact of the event.
<b>Booking Contact Title</b>	Merges in the title of the booking contact of the event; e.g., "Owner," "General Manager," etc. This is a field you can customize.
<b>Booking Contact Salutation</b>	Merges in the salutation of the booking contact of the event; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. <i>Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.</i>
<b>Booking Contact Telephone</b>	Merges in the specific telephone number belonging to the booking contact of the event. <i>Note: This will likely be different from the general phone number belonging to the customer.</i>
<b>Booking Contact Fax</b>	Merges in the specific fax number belonging to the booking contact of the event. See note under <i>Booking Contact Salutation</i> , above.
<b>Booking Contact Cellular</b>	Merges in the specific cell phone number belonging to the booking contact of the event. See note under <i>Booking Contact Salutation</i> , above.
<b>Booking Contact Email</b>	Merges in the specific e-mail address belonging to the booking contact of the event. See note under <i>Booking Contact Salutation</i> , above.
<b>Booking Contact Address</b>	Merges in the specific address belonging to the booking contact of the event. See note under <i>Booking Contact Salutation</i> , above.
<b>Booking Contact City, St/Prov, Postal</b>	Merges in these three details in City, State/Province, ZIP Code order. See note under <i>Booking Contact Salutation</i> , above.
<b>Site Contact</b>	Merges in the first name and last name of the site contact of the event.
<b>Site Contact First</b>	Merges in the first name only of the site contact.
<b>Site Contact Last</b>	Merges in the last name only of the site contact.
<b>Site Contact Title</b>	Merges in the title of the site contact of the event; e.g., "Owner," "General Manager," etc. This is a quickpick list you can customize.
<b>Site Contact Salutation</b>	Merges in the salutation of the site contact of the event; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. <i>Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.</i>
<b>Site Contact Telephone</b>	Merges in the specific telephone number belonging to the site contact of the event. <i>Note: This will likely be different from the general phone number belonging to the customer.</i>
<b>Site Contact Fax</b>	Merges in the specific fax number belonging to the site contact of the event. See note under <i>Site Contact Salutation</i> , above.
<b>Site Contact Cellular</b>	Merges in the specific cell phone number belonging to the site contact of the event. See note under <i>Site Contact Salutation</i> , above.
<b>Site Contact Email</b>	Merges in the specific email address belonging to the site contact of the event. See note under <i>Site Contact Salutation</i> , above.
<b>Sales Rep</b>	Merges in the name of the sales representative who is attached to this event.
<b>Sales Rep Telephone</b>	Merges in the telephone number associated with the sales representative who is attached to this event.
<b>Sales Rep Cellular</b>	Merges in the cellular phone number associated with the sales representative who is attached to the selected event.
<b>Sales Rep Email</b>	Merges in the specific e-mail address belonging to the sales representative of the selected event.
<b>Event Category</b>	Merges in the category of the event, which is a customizable quickpick list you can use to track your events. <i>Note: This category is different from the Category associated with the account. Each event might have its own category.</i>
<b>Event Theme</b>	Merges in the theme of the event.
<b>Event Reference</b>	Merges in the reference of the event. <i>Note: This reference is different from the Reference associated with the account. Each event might have its own reference, while the Account Reference is entered into the account details, and indicates how this customer originally heard of your company.</i>
<b>Event Pay Method</b>	Merges in the pay method of the event, as entered on the Miscellaneous tab in Event Manager. <i>Note: This is the general pay method of the event, not the pay method of an individual payment.</i>
<b>Event Credit Card Number</b>	Merges in the Credit Card number that will be used to pay for the event.
<b>Business Type</b>	Merges in the business type of the event, e.g., "Full Service," "Delivery," etc. This is a customizable quickpick list.
<b>Operation</b>	Merges in the operation of the event. This is a quickpick list you can use to track multiple locations.

Field	Description
<b>Event Number</b>	Merges in the event number automatically assigned to this event by the program. <i>Note: You can establish a unique prefix for these numbers up to three-characters long (through <b>Administration &gt; Settings &gt; Global Settings</b>).</i>
<b>PO Number</b>	Merges in the purchase order number for the event, if you have entered one. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>Folio Number</b>	Merges in the folio number (unique number identifying your account, for record-keeping purposes) for the event. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>Billing Client</b>	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's name; if you have not, this field will merge in the name of the customer holding the event.
<b>Billing Address</b>	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's address; if you have not, this field will merge in the address of the customer holding the event.
<b>Billing City</b>	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's city; if you have not, this field will merge in the city of the customer holding the event.
<b>Billing St/Prov</b>	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's state or province; if you have not, this field will merge in the state or province of the customer holding the event.
<b>Billing Postal</b>	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's postal/ZIP code; if you have not, this field will merge in the postal/ZIP code of the customer holding the event.
<b>Booked Date</b>	Merges in the date on which this event was originally entered into Caterease. This date is automatically assigned by the program, but you can edit the date, if necessary.
<b>Booked Date Formatted</b>	Merges in the booked date, using formatting.
<b>Revised Date/Time</b>	Merges in the date and time on which this event was last revised Caterease. This date is automatically assigned by the program.
<b>Adults</b>	Merges in the adult guest count of the event. <i>Note: This field is not usually displayed on your screen by default, but you can easily add it to your screen. You can rename this field.</i>
<b>Children</b>	Merges in the children guest count of the event. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen. You can rename this field.</i>
<b>Loyalty Number</b>	Merges in the loyalty number associated with the event; usually defaults from the client or contact person. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen. You can rename this field.</i>
<b>Discount Comment</b>	Merges in the discount comment entered in the <u>Comment</u> field on the Event Discounts window ( <b>Home &gt; Tools &gt; Default Discounts</b> ) in Event Manager.
<b>Event Notes</b>	Merges in all text in the Event Notes text block, complete with rich-text formatting.
<b>Event Notes (Unformatted)</b>	Merges in all text in the Event Notes text block, without any formatting (so it adopts the formatting of the merge document).
<b>Allergy Alert</b>	Merges in all text in the Allergy Information text block ( <b>Home &gt; Tools &gt; Allergy Information</b> ), complete with rich-text formatting.
<b>Allergy Alert (Unformatted)</b>	Merges in all text in the Allergy Information text block ( <b>Home &gt; Tools &gt; Allergy Information</b> ), without any formatting (so it adopts the formatting of the merge document).

## Sub-Event Merge Fields

Use the following merge fields to pull information pertaining to the currently selected sub-event of a party (the first sub-event is selected by default):

**Note:** To include information from multiple sub-events, use a sub-event merge table.

Field	Description
<b>Description</b>	Merges in the description of the event's first sub-event; e.g., "Dinner Buffet," "Meeting," "Breakfast," etc.
<b>Type</b>	Merges in the type of the event's first sub-event, e.g., "On Premise," "Off Premise," etc.
<b>Time: Start</b>	Merges in the start time of the event's first sub-event.
<b>Time: End</b>	Merges in the end time of the event's first sub-event.
<b>Time: Delivery</b>	Merges in the delivery time of the event's first sub-event.
<b>Time: Serving</b>	Merges in the serving time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Bar</b>	Merges in the bar time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Arrival</b>	Merges in the arrival time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Departure</b>	Merges in the departure time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: NA</b>	These two fields represent two extra time fields that you can make up yourself. They will each merge in the respective time information from the event's first sub-event.
<b>Time: Staff In</b>	Merges in the staff arrival time of the event's first sub-event. <i>Note: You can rename this field in <b>Administration &gt; General &gt; Customize Names &gt; Times</b>.</i>
<b>Time: Setup</b>	Merges in the setup time of the event's first sub-event. <i>Note: This field, which displays as Hours and Minutes (not as a time), is set up in <b>Administration &gt; New Booking Defaults &gt; Sub-Events</b>.</i>
<b>Time: Tear Down</b>	Merges in the tear down time of the event's first sub-event. <i>Note: This field, which is set up in <b>Administration &gt; New Booking Defaults &gt; Sub-Events</b>, displays as Hours and Minutes, not as a time.</i>
<b>Date</b>	Merges in the date of the event's first sub-event.
<b>Room</b>	Merges in the name of the room of the event's first sub-event.
<b>Room Chg</b>	Merges in the room charge of the event's first sub-event.
<b>Room Category</b>	Merges in the room category of the event's first sub-event.
<b>Setup Style</b>	Merges in the setup style of the event's first sub-event.
<b>Site Name</b>	Merges in the name of the off-premise site location of the event's first sub-event.
<b>Site Address</b>	Merges in the address of the off-premise site location of the event's first sub-event.
<b>Site City</b>	Merges in the city of the off-premise site location of the event's first sub-event.
<b>Site St/Prov</b>	Merges in the state or province of the off-premise site location of the event's first sub-event.
<b>Site Postal</b>	Merges in the postal/zip code of the off-premise site location of the event's first sub-event.
<b>Site Telephone</b>	Merges in the telephone number of the off-premise site location of the event's first sub-event.
<b>Site Directions</b>	Merges in all text in the Directions text block of the event's first sub-event, complete with rich-text formatting.
<b>Site Directions (Unformatted)</b>	Merges in all text in the Directions text block of the event's first sub-event, without any formatting (so it adopts the formatting of the merge document).
<b>Site Notes</b>	Merges in all text in the <b>Notes</b> text block of the Site Location Database ( <b>Setup &gt; Site Locations</b> ), complete with rich-text formatting.
<b>Site Notes (Unformatted)</b>	Merges in all text in the <b>Notes</b> text block of the Site Location Database ( <b>Setup &gt; Site Locations</b> ) without any formatting (so it adopts the formatting of the merge document).
<b>Site Description</b>	Merges in all text in the <b>Description</b> text block of the Site Location Database ( <b>Setup &gt; Site Locations</b> ), complete with rich-text formatting.
<b>Site Description (Unformatted)</b>	Merges in all text in the <b>Description</b> text block of the Site Location Database ( <b>Setup &gt; Site Locations</b> ) without any formatting (so it adopts the formatting of the merge document).
<b>Site Category</b>	Merges in the name of the site category. This is a customizable quickpick list.
<b>Site Website</b>	Merges in the website address of the off-premise site location of the event's first sub-event.
<b>Setup Notes</b>	Merges in all text contained within the <b>Setup Notes</b> area of the event's first sub-event, complete with rich text formatting.
<b>Setup Notes (Unformatted)</b>	Merges in all text contained within the <b>Setup Notes</b> area, without any formatting (so it adopts the formatting of the merge document).
<b>Setup Person</b>	Merges in the name of the setup person. This is a customizable quickpick list.
<b>Delivery Charge</b>	Merges in the delivery charge, if applicable,
<b>Delivery Category</b>	Merges in the delivery category. This is a customizable quickpick list.

Field	Description
<b>Delivery Person</b>	Merges in the name of the delivery person. This is a customizable quickpick list.
<b>Delivery Notes</b>	Merges in all text contained within the <b>Delivery Notes</b> area of the event's first sub-event, complete with rich text formatting.
<b>Delivery Notes (Unformatted)</b>	Merges in all text contained within the <b>Delivery Notes</b> area, without any formatting (so it adopts the formatting of the merge document).
<b>Comments</b>	Merges in all text on the <b>Comments</b> tab of the event's first sub-event, complete with rich text formatting.
<b>Comments (Unformatted)</b>	Merges in all text on the <b>Comments</b> tab of the event's first sub-event, without any formatting (so it adopts the formatting of the merge document).
<b>Planned Guests</b>	Merges in the planned guest count of the event's first sub-event.
<b>Actual Guests</b>	Merges in the actual guest count of the event's first sub-event.
<b>Guaranteed Guests</b>	Merges in the guaranteed guest count of event's first sub-event.
<b>Sub-Event Number</b>	Merges in the sub-event number of the event's first sub-event.

## Staffing Merge Fields

Use the following merge fields to pull information pertaining to the staff working a party:

**Note:** The Staffing Merge Fields listed below are designed to be used to create e-mails that can be sent in batch to several employees from the Staffing Activity Query results screen. Thus, each merge field merges data specific to one individual employee and one shift.

Field	Description
<b>Employee Name</b>	Merges in the first and last name of the employee.
<b>Start</b>	Indicates the time this specific shift begins; can be set to default to any time associated with the event, and can be edited when necessary.
<b>End</b>	Indicates the time this specific shift ends; can be set to default to any time associated with the event, and can be edited when necessary.
<b>Position</b>	Indicates the specific shift or position needed for this sub-event (Waiter, Bartender, etc.).
<b>Uniform</b>	Merges in the uniform the employee will wear when working a particular shift; offers a custom quickpick list of choices.

## Financial Merge Fields

Use the following merge fields to pull information pertaining to the finances of an event:

Field	Description
<b>Subtotal</b>	Merges in the subtotal for the entire event.
<b>Gratuity</b>	Merges in the total gratuity for the entire event.
<b>Service Charge</b>	Merges in the total service charge for the event.
<b>Tax</b>	Merges in the total tax for the event.
<b>Total</b>	Merges in the total of the event, including tax and service charge.
<b>Paid</b>	Merges in the total amount paid to day for the event.
<b>Balance</b>	Merges in the currently outstanding balance for the event.
<b>Cost</b>	Merges in the total cost (to you) of the event; includes cumulative costs of menu items, as well as staffing and any additional cost adjustments you might have made using the Event Costing Summary tool.
<b>Profit</b>	Merges in the total profit for the event.
<b>Discount</b>	Merges in the total discount that has been applied to the event using the Event Dis-

Field	Description
	counts tool.
<b>Value</b>	Merges in the Event Value based on parameters you can establish in your Global Settings.
<b>Next Deposit</b>	Merges in the amount of the next deposit scheduled for the event. <i>Note: Deposits are scheduled using the Deposits Due tool in Event Manager.</i>
<b>Next Deposit Due Date</b>	Merges in the due date of the next deposit scheduled for the event (see note above).
<b>Cost Per Guest</b>	Merges in the cost per guest for the event that is automatically calculated by dividing the TOTAL of the event by the guest count.
<b>Cost Per Guest (from Subtotal)</b>	Merges in the cost per guest automatically calculated by dividing the SUBTOTAL by the guest count.
<b>Cancel Charge</b>	Merges in the cancellation charge for the event, as entered into the <b>Miscellaneous</b> tab in Event Manager.
<b>Cancel Date</b>	Merges in the date on which the selected event was cancelled. This date is automatically assigned by the program, but you can edit this, if necessary.
<b>Room Chg</b>	Merges in the amount entered in the <u>Room Charge</u> field on the <b>Venue</b> tab of the Sub-Event window.
<b>Delivery Charge</b>	Merges in the amount entered in the <u>Delivery Charge</u> field on the <b>Delivery</b> tab of the Sub-Event window.
<b>Food Subtotal</b>	Merges in the sum total of all menu items with a type of "Food" ordered for the entire event.
<b>Beverage Subtotal</b>	Merges in the sum total of all menu items with a type of "Beverage" ordered for the entire event.
<b>Liquor Subtotal</b>	Merges in the sum total of all menu items with a type of "Liquor" ordered for the entire event.
<b>Equipment Subtotal</b>	Merges in the sum total of all menu items with a type of "Equipment" ordered for the entire event.
<b>Labor Subtotal</b>	Merges in the sum total of all menu items with a type of "Labor" ordered for the entire event.
<b>Room Subtotal</b>	Merges in the sum total of all menu items with a type of "Room" ordered for the entire event.
<b>Other Subtotal</b>	Merges in the sum total of all menu items with a type of "Other" ordered for the entire event.
<b>Food Gratuity</b>	Merges in only the food gratuity for the event.
<b>Beverage Gratuity</b>	Merges in only the beverage gratuity for the event.
<b>Liquor Gratuity</b>	Merges in only the liquor gratuity for the event.
<b>Equipment Gratuity</b>	Merges in only the equipment gratuity for the event.
<b>Labor Gratuity</b>	Merges in only the labor gratuity for the event.
<b>Room Gratuity</b>	Merges in only the room gratuity for the event.
<b>Other Gratuity</b>	Merges in only the gratuity for items that have been established as "Other" in your Default Tax & Service Charge Rates.
<b>Food Service Charge</b>	Merges in only the food service charge for the event.
<b>Beverage Service Charge</b>	Merges in only the beverage service charge for the event.
<b>Liquor Service Charge</b>	Merges in only the liquor service charge for the event.
<b>Equipment Service Charge</b>	Merges in only the equipment service charge for the event.
<b>Labor Service Charge</b>	Merges in only the labor service charge for the event.
<b>Room Service Charge</b>	Merges in only the room service charge for the event.
<b>Other Service Charge</b>	Merges in only the service charge for items that have been established as "Other" in your Default Tax & Service Charge Rates.
<b>Food Tax</b>	Merges in only the food tax for the event.
<b>Beverage Tax</b>	Merges in only the beverage tax for the event.
<b>Liquor Tax</b>	Merges in only the liquor tax for the event.
<b>Equipment Tax</b>	Merges in only the equipment tax for the event.
<b>Labor Tax</b>	Merges in only the labor tax for the event.
<b>Room Tax</b>	Merges in only the room tax for the event.
<b>Other Tax</b>	Merges in only the tax for items that have been established as "Other" in your Default

Field	Description
	Tax & Service Charge Rates.
<b>Food Total</b>	Merges in only the food total for the event.
<b>Beverage Total</b>	Merges in only the beverage total for the event.
<b>Liquor Total</b>	Merges in only the liquor total for the event.
<b>Equipment Total</b>	Merges in only the equipment total for the event.
<b>Labor Total</b>	Merges in only the labor total for the event.
<b>Room Total</b>	Merges in the room total for the event.
<b>Other Total</b>	Merges in the total for items that have been established as "Other" in your Default Tax & Service Charge Rates.
<b>Taxes: First</b>	Merges in the total First Tax (from the first tax column) for the event. <i>Note: Many companies will only use this first column, and thus do not need this breakdown. Those companies can simply use the "Tax" merge field, above.</i>
<b>Taxes: Second</b>	Merges in the total Second Tax (from the second tax column) for the event. <i>See note above.</i>
<b>Taxes: Third</b>	Merges in the total Third Tax (from the third tax column) for the event. <i>See note above.</i>

## Sub-Event Financial Merge Fields

Use the following merge fields to pull information pertaining to the finances of a sub-event.

Field	Description
<b>Subtotal</b>	Merges in the subtotal for the sub-event.
<b>Gratuity</b>	Merges in the total gratuity for sub-event.
<b>Service Charge</b>	Merges in the total service charge for the sub-event.
<b>Total</b>	Merges in the total of the sub-event, including tax and service charge.
<b>Cost Per Guest</b>	Merges in the cost per guest for the sub-event that is automatically calculated by dividing the TOTAL of the event by the guest count.
<b>Cost Per Guest (Subtotal)</b>	Merges in the cost per guest automatically calculated by dividing the SUBTOTAL by the guest count.

## Proposal Merge Fields

Use the following merge fields to pull information pertaining to proposals created in Prospect Manager:

Field	Description
<b>Party Name</b>	Merges in the Party Name of the proposal.
<b>Sales Rep</b>	Merges in the sales representative of the proposal.
<b>Sales Rep Telephone</b>	Merges in the specific telephone number belonging to the sales representative of the proposal.
<b>Sales Rep Cellular</b>	Merges in the specific cell phone number belonging to the sales representative of the proposal.
<b>Sales Rep Email</b>	Merges in the specific e-mail address belonging to the sales representative of the proposal.
<b>Proposal Category</b>	Merges in the category of the proposal, which is a customizable quickpick list you can use to track your prospects. <i>Note: This field can be renamed.</i>
<b>Theme</b>	Merges in the theme of the proposal.
<b>Reference</b>	Merges in the reference of the proposal.
<b>Booking Contact</b>	Merges in the first name and last name of the booking contact of the proposal.
<b>Booking Contact Title</b>	Merges in the title of the booking contact of the proposal; e.g., "Owner," "General Manager," etc.
<b>Booking Contact Salutation</b>	Merges in the salutation of the booking contact of the proposal; e.g., "Tom," "Mr."

Field	Description
	Smith," "Mrs. Johnson," etc. <i>Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.</i>
<b>Booking Contact Telephone</b>	Merges in the specific telephone number belonging to the booking contact associated with the proposal.
<b>Booking Contact Email</b>	Merges in the specific e-mail address belonging to the booking contact associated with the proposal.
<b>Planned Guests</b>	Merges in the planned guest count of the proposal.
<b>Actual Guests</b>	Merges in the actual guest count of the proposal.
<b>Date</b>	Merges in the date on which the proposed event would take place.
<b>Start Time</b>	Merges in the start time established in the proposal.
<b>End Time</b>	Merges in the end time established in the proposal.
<b>Subtotal</b>	Merges in the subtotal established in the proposal.
<b>Gratuify</b>	Merges in the gratuity established in the proposal.
<b>Serv Charge</b>	Merges in the service charge established in the proposal.
<b>Tax</b>	Merges in the tax established in the proposal.
<b>Total</b>	Merges in the total established in the proposal.
<b>Cost Per Guest</b>	Merges in the cost per guest for the proposal (automatically calculated by dividing the TOTAL by the guest count).
<b>Cost Per Guest (from Subtotal)</b>	Merges in the cost per guest for the proposal (automatically calculated by dividing the SUBTOTAL by the guest count).
<b>Notes</b>	Merges in all text in the Notes text block in Prospect Manager, complete with rich-text formatting.
<b>Notes (Unformatted)</b>	Merges in all text in the Notes text block in Prospect Manager, without any formatting (so it adopts the formatting of the merge document).
<b>Comments</b>	Merges in all text on the Comments tab in Prospect Manager (Details area of the Proposal), complete with rich-text formatting.
<b>Comments (Unformatted)</b>	Merges in all text in the Comments tab in Prospect Manager (Details area of the Proposal), without any formatting (so it adopts the formatting of the merge document).

## Employee Merge Fields

Use the following merge fields to pull information pertaining to your employees, as established in Employee Manager:

Field	Description
<b>Name</b>	Merges in the first name and last name of the employee.
<b>Last</b>	Merges in the last name only of the employee.
<b>First</b>	Merges in the first name only of the employee.
<b>Agency</b>	Merges in an Employment Agency. <i>Note: This field is not displayed on your screen by default, but you can easily add it to your screen.</i>
<b>Employee #</b>	Merges in the Employee #. This number is auto-assigned by Caterease. <i>Note: You can establish a unique prefix for these numbers up to three characters long (through <b>Administration &gt; Settings &gt; Global Settings &gt; Managers</b>).</i>
<b>Email</b>	Merges in the specific email address belonging to the employee for the selected event.
<b>Home Address</b>	Merges in the employee's home address.
<b>City, St/Prov Postal</b>	Merges in these three details of employee; meant to eliminate the need to select each field separately when they are commonly used in combination (in letters and such).
<b>Telephone</b>	Merges in the telephone number for the employee.
<b>Cellular</b>	Merges in the cellular phone number for the employee.
<b>Notes</b>	Merges in all text contained within the Notes area on the main screen in Employee Manager, complete with rich text formatting.
<b>Notes (Unformatted)</b>	Merges in all text contained within the Notes area on the main screen in Employee Manager, without any formatting (so it adopts the formatting of the merge document).

## Guestrooms Merge Fields

Use the following merge fields to pull information pertaining to group rooms contracts created in Guestrooms Manager:

Field	Description
<b>Arrival Date</b>	Merges in the arrival date of the group rooms booking.
<b>Departure Date</b>	Merges in the departure date of the group rooms booking.
<b>Group Name</b>	Merges in the group name of the group rooms booking.
<b>Status</b>	Merges in the status of the group rooms booking.
<b>Booking Contact</b>	Merges in the first name and last name of the booking contact of the group rooms booking.
<b>Booking Contact Title</b>	Merges in the title of the booking contact of the group rooms booking; e.g., "Owner," "General Manager," etc.
<b>Booking Contact Salutation</b>	Merges in the salutation of the booking contact of the group rooms booking; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. <i>Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.</i>
<b>Booking Contact Telephone</b>	Merges in the telephone number for the group rooms booking contact.
<b>Booking Contact Cellular</b>	Merges in the cellular number for the group rooms booking contact.
<b>Booking Contact Email</b>	Merges in the e-mail address for the group rooms booking contact.
<b>Site Contact</b>	Merges in the first name and last name of the site contact of the group rooms booking.
<b>Site Contact Title</b>	Merges in the title of the site contact of the group rooms booking; e.g., "Owner," "General Manager," etc.
<b>Site Contact Salutation</b>	Merges in the salutation of the site contact of the group rooms booking; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. <i>Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.</i>
<b>Site Contact Telephone</b>	Merges in the telephone number for the group rooms site contact.
<b>Site Contact Cellular</b>	Merges in the cellular number for the group rooms site contact.
<b>Site Contact Email</b>	Merges in the e-mail address for the group rooms site contact.
<b>Sales Rep</b>	Merges in the sales representative of the group rooms booking.
<b>Method of Reservation</b>	Merges in the method of reservation of the group rooms booking.
<b>Reservation Cut-Off</b>	Merges in the reservation cut-off date of the group rooms booking.
<b>Pay Method</b>	Merges in the payment method of the group rooms booking.
<b>Contract Return Date</b>	Merges in the contract return date of the group rooms booking.
<b>Log #</b>	Merges in the log # (automatically assigned by the program) of the group rooms booking.
<b>Folio #</b>	Merges in the folio # of the group rooms booking.
<b>Room Count</b>	Merges in the total number of rooms blocked for the group rooms booking.
<b>Tax</b>	Merges in the total taxes of the group rooms booking.
<b>Total</b>	Merges in the total of the group rooms booking.
<b>Next Deposit</b>	Merges in the amount of the next deposit due for the group rooms booking.
<b>Next Deposit Due Date</b>	Merges in the due date of the next deposit due for the group rooms booking.
<b>Notes</b>	Merges in all text in the Notes text block in Guestrooms Manager, complete with rich-text formatting.
<b>Notes (Unformatted)</b>	Merges in all text contained within the Notes area on the main screen in Guestrooms Manager, without any formatting (so it adopts the formatting of the merge document).
<b>Comments</b>	Merges in all text on the Comments tab in Guestrooms Manager (Details area of the Proposal), complete with rich-text formatting.
<b>Comments (Unformatted)</b>	Merges in all text in the Comments tab in Guestrooms Manager, without any formatting (so it adopts the formatting of the merge document).

## User Defined Merge Fields

Use the following merge fields to pull information entered into your custom user-defined fields:

Field	Description
<b>Account User Defined Fields</b>	Lists all custom fields you may have created for your accounts (customers).
<b>Event User Defined Fields</b>	Lists all custom fields you may have created for your events.
<b>Sub-Event User Defined Fields</b>	Lists all custom fields you may have created for your sub-events (meals).
<b>Site User Defined Fields</b>	Lists all custom fields you may have created for your site locations.
<b>Proposal User Defined Fields</b>	Lists all custom fields you may have created for your proposals in Prospect Manager.
<b>Guestrooms User Defined Fields</b>	Lists all custom fields you may have created for your group rooms bookings.

## Special Merge Fields

Use the following merge fields to put miscellaneous information on your document:

Field	Description
<b>Current Date (Long)</b>	Merges in the current date, including day, in the format "Saturday, August 29, 2015."
<b>Current Date</b>	Merges in the current date, in the format "8/29/2015."
<b>Current Date Formatted</b>	Merges in the current date, which can be formatted as desired.
<b>Current Time</b>	Merges in the current time, in the format "05:35 pm."
<b>Tax Exempt</b>	Merges in the words "Tax Exempt" if the event is tax exempt; if not, remains blank.
<b>Exempt Number</b>	Merges in the word "Number:" followed by the event's tax exempt number, if one exists; if not, remains blank.
<b>Current Date &amp; Time</b>	Merges in the current date and time.

## Inserting a Table into a Document

1. Click the **Setup** sidebar on the left-hand side of your screen, and click **Marketing Tools**.

**Result:** The Marketing Tools window opens.

**Note:** As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Prints > Marketing Tools**.

**Tip:** As an alternative, you can use the **Create Table** tool to "draw" a table by dragging over the desired number of columns and rows.

2. Select a document from the **Documents** list on the left-hand pane of the window.
3. Click into the document where you would like the table to be inserted.
4. Click the **Tables** button, located in the **Home** ribbon tab at the top of your screen, and choose **Create Table**.

**Result:** The Insert Table window opens.

5. Create a table by setting the following options:

- **Number of Columns**

Set the number of columns you want to include in your table.

**Note:** Additional columns and rows can be added later, if necessary.

- **Number of Rows**

Set the number of rows you want to include in your table.

- **Alignment**

Select whether you want the table to appear on the left side of the page, in the center, or on the right.

**Note:** If the width of your table is 100% (see "Width," below), then the table will take up the entire width of the page.

- **Border**

Choose whether or not you want borders around the cells of your table.

**Note:** Borders can be removed after the table has been inserted, if necessary.







- **Width**

Set the width for your table as a percentage of the page you are placing it on.









6. When finished, click **OK**.

## Modifying a Table

1. Click into a cell or highlight multiple cells of a table.
2. Choose from the options described below, which are available in the **Extended Text Editing** group on the **Home** ribbon tab at the top of your screen:

Symbol	Description
	<b>Split Cell:</b> (Found by clicking the <b>Tables</b> button) Splits the cell or cells you have highlighted in half (i.e., splits each individual cell into two).
	<b>Combine Cells:</b> (Found by clicking the <b>Tables</b> button) Combines the currently highlighted cells into one cell. Note: To use, first highlight two or more cells in the table.
	<b>Insert Row:</b> Inserts a row below the current cursor position.
	<b>Delete Row:</b> Deletes the row where the cursor currently resides.
	<b>Insert Column:</b> Inserts a column to the right of the current cursor position.
	<b>Delete Column:</b> Deletes the column where the cursor currently resides.

3. The following options are found by clicking the **Borders** button :

Symbol	Description
	<b>Left Borders:</b> Adds borders to the left-hand side of the currently highlighted cell(s).
	<b>Right Borders:</b> Adds borders to the right-hand side of the currently highlighted cell(s).
	<b>Top Borders:</b> Adds borders across the top of the currently highlighted cell(s).
	<b>Bottom Borders:</b> Adds borders across the bottom of the currently highlighted cell(s).
	<b>Switch Borders On:</b> Adds borders to all sides of the currently highlighted cell(s).
	<b>Switch Borders Off:</b> Removes all borders from the currently highlighted cell(s).
	<b>Inner Borders:</b> Adds inside borders (vertical and/or horizontal) to the currently highlighted cell(s).
	<b>Outer Borders:</b> Adds borders to the outside edges of the currently highlighted cell(s).

# Using Merge Tables to Insert Menu Items, Payments, Etc.

In addition to inserting merge fields into a document, you can use "merge tables" to insert entire groups of information, such as menu items, staffing, details of multiple sub-events, and more. You can even "nest" these merge tables in the cells of other tables to arrange them neatly on the left- or right-hand side of a document.

## Inserting a Merge Table into a Document

1. Click the **Setup** sidebar on the left-hand side of your screen and click **Marketing Tools**.

**Result:** The Marketing Tools window opens.

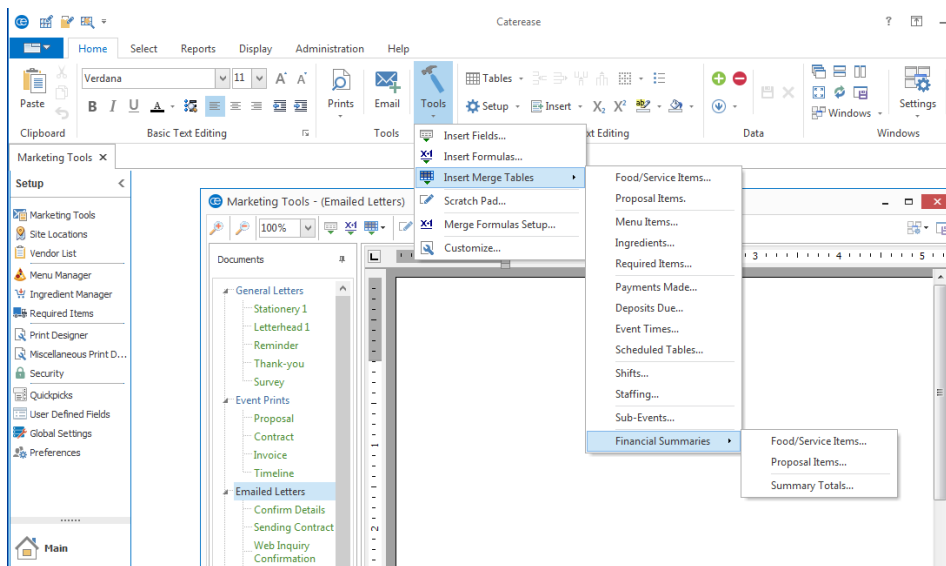
**Note:** As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Prints > Marketing Tools**.

**Tip:** Merge tables can be edited after they have been created, inserting additional fields, editing filter rules, etc. See "Editing an Existing Merge Table."

2. Select a document from the **Documents** pane, located on the left-hand side of your screen.
3. Click into the document where you would like the merge table to be inserted.
4. Click the **Tools** button, located in the **Home** ribbon tab at the top of your screen, and choose **Insert Merge Tables**.

**Result:** A list of available merge table options displays.

**Note:** The settings on this window (field selections, options, and filters, discussed below, default from the previous merge table you have created of this type.



## Available Merge Tables

Merge Table	Description
<b>Food/Service Items</b>	Insert all menu items for the event, or choose to insert groups of menu items based on item Type, Category, Prep Area, Vendor, or Hidden Status.
<b>Proposal Items</b>	Insert all menu items selected for a proposal in Prospect Manager or optionally separate them based on item Type, Category, Prep Area, Vendor, or Hidden Status.

Merge Table	Description
<b>Menu Items</b>	Insert all menu items listed in your default menus in Menu Manager, or optionally separate them based on the menu they are in, or item Type, Category, or Prep Area.
<b>Ingredients</b>	This merge table produces a summary of similar ingredients, in which all event ingredients have the same Item Name, Unit, Prep Area, Category, Vendor, Comment, and Conversion.
<b>Required Items</b>	Insert a summary of similar required items, in which all event required items have the same Item Name, Unit, Category, Vendor, and Comment.
<b>Payments Made</b>	Insert all payments made for the event, or choose to insert only payments of a particular payment method.
<b>Deposits Due</b>	Insert all future deposits due for this event, or choose to insert only those deposits that have been paid or that remain unpaid.
<b>Event Times</b>	Insert all Event times and timeline items for the event, or separate them based on Category or Type.
<b>Scheduled Items</b>	Insert all Scheduled Items for the event, or separate them based on Category or Type. ("Items" can be changed to Tables, Lanes, etc.).
<b>Shifts</b>	Insert all shifts scheduled for an event, or choose to insert groups of shifts based on Position or Shift Category.
<b>Staffing</b>	Insert all employees scheduled to work an event, or choose to insert groups of staff based on Position, Staff Category, or whether they have confirmed they will work the event.
<b>Sub-Events</b>	Insert details from all sub-events, including times and venue details - or choose to insert groups of sub-events based on sub-event Description or Type.
<b>Financial Summaries</b>	Insert summary totals of groups of menu items based on item Type or Category, or general event financial totals such as the event Subtotal, Tax, Service Charge, Gratuity, Total, Cost, Profit, etc.

5. Under **Select Fields** (the large white pane on the left side of the window), check into the checkboxes next to any details you want to include in the document.

**Note:** "Unformatted" fields (Food/Service Item Descriptions, Sub-Event Comments, Sub-Event Site Directions) merge in text only ( without formatting), and inherit the rich-text formatting you apply here in the document.

**Food/Service Items Merge Table**

**Select Fields**

- ☒ Item Name
- ☒ Qty
- ☒ Total
- ☒ Price
- ☐ Description
- ☐ Description (Unformatted)
- ☐ Picture
- ☐ Category
- ☐ Time
- ☐ Prep Area
- ☐ Unit
- ☐ Item ID
- ☐ Acct Code
- ☐ Comment
- ☐ Instructions
- ☐ Instructions (Unformatted)
- ☐ Label
- ☐ Label (Unformatted)
- ☐ Notes
- ☐ Notes (Unformatted)
- ☐ Modifications
- ☐ Modifications (Unformatted)
- ☐ Vendor
- ☐ Cost
- ☐ Returned

**Display Options**

- ☒ Show Header
- ☒ Insert At The Bottom Of Page
- ☒ Show Borders
- ☐ Show Filter Comment
- ☒ Suppress Table When Empty
- ☐ Odd/Even Data Rows
- ☐ Group By Sub-Event

**Filter Options**

- ☒ Exclude Items Without Quantities

Type: equals All selected

Category: equals All selected

Prep Area: equals All selected

Vendor: equals All selected

Hidden Status: All selected

☒ Add Summary Row

OK Cancel

6. **[Optional]** Hold your left mouse button down on any field you have selected in the **Select Fields** pane and drag that field up or down in the list, to rearrange the order fields will appear in the print.

7. Under **Display Options** on the right-hand side of the window, select any or all of the following options:

- **Show Header**

Shows a header row across the top of the table, labeling each column you have chosen to include ("Description," "Price," "Qty," etc.).

**Note:** Optionally apply a background color to the header row using the color palette to the right of the field.

- **Insert at Bottom of Page**

Inserts the table at the bottom-most line of your document, regardless of where your cursor currently resides.

**Note:** This may not necessarily be the bottom of the page; it's the lowest "carriage return" spot.

- **Show Borders**

Choose to show borders around each cell of the merge table - between each row and column.

- **Show Filter Comment**

Displays a comment below the merge table describing the specific filter you apply to this table (see topic below).

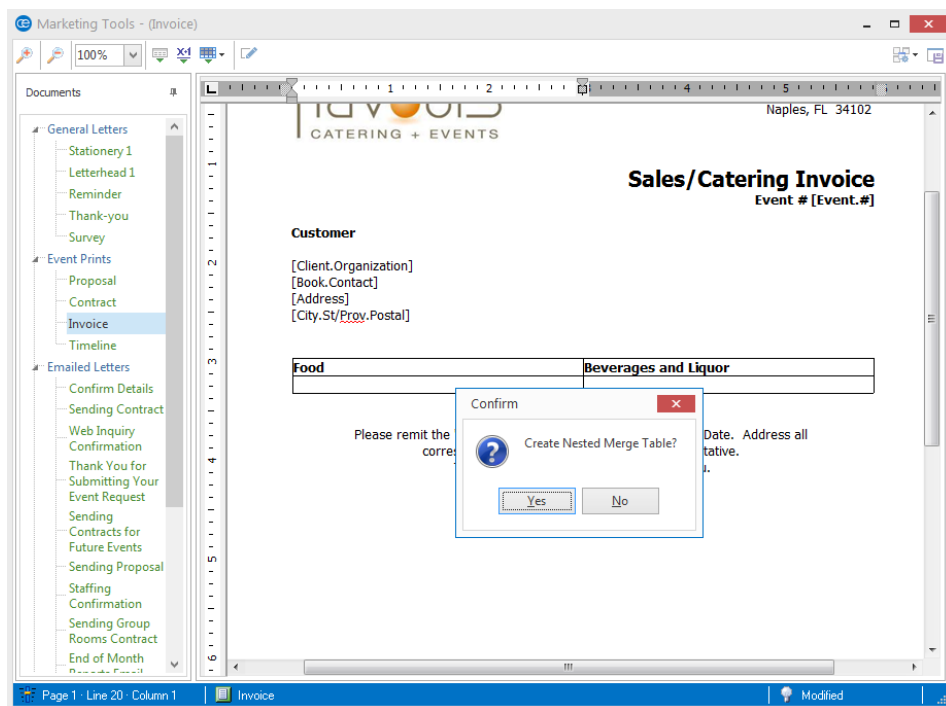
**Note:** This comment will not print on the final document; it is visible in this design mode only.

- **Suppress Table When Empty**  
Suppresses the table from the printed document when it is empty, meaning that no empty table or blank space will display when there are no items to merge.
  - **Odd/Even Data Rows**  
Displays data in Odd Row/Even Row format, in order to neatly separate/organize the displayed data.
  - **Group By Sub-Event (Food/Service Items, Shifts and Staffing Only)**  
When printed for an event with multiple sub-events, items in this table will be separated based on the sub-event they belong to.
8. Under **Filter Options** on the lower right-hand side of the window, determine which specific items to include in this table as described under "Merge Table Filter Options" at the bottom of this topic.

## Using Nested Tables to Arrange Information in a Document

You can control the layout of a particular merge document using tables within tables, or “nested” tables. For example, imagine you want to design a contract that shows food items on the left side of the print and beverage items on the right. You can accomplish this by creating a standard, two-column table to split the page in half, and then inserting one merge table (for food items) in the left column and a second merge table (for beverage items) in the column on the right.

1. Click into the document where you would like the nested tables to be inserted.
2. Click the **Tables** button, located in the **Home** ribbon tab at the top of your screen, and choose **Create Table**.  
**Result:** *The Insert Table window opens.*
3. Enter properties (number of rows/columns, borders, etc.), for a new table, and click **OK**.  
**Result:** *The table is inserted into the document at the current cursor location.*  
**Important:** *Most often, tables used for nesting do not contain borders; they serve as “invisible” ways to split the printed page. If you include borders here, refer to the important note on the following page regarding how to remove them after you have nested your tables.*
4. Click into a particular cell (left, right, first row, second row, etc.), of the new table.
5. Click the **Tools** button, located in the **Home** ribbon tab at the top of your screen, and choose **Insert Merge Tables**.  
**Result:** *A list of available merge table options displays.*



6. Choose a specific type of merge table (Food/Service Items, Payments, Deposits, etc.), to insert.  
**Result:** *A confirmation message appears, informing you that you are inserting a "nested" merge table.*
7. Click **Yes** to confirm.  
**Result:** *The Merge Table window opens.*
8. Establish merge table settings as explained in topics above.  
**Important:** *Be sure the merge table option **Insert at the Bottom of Page** is unchecked to properly nest the table.*

**IMPORTANT:** If you want to remove borders from the original table you added in Steps 4 & 5, above, AFTER you have nested other tables, here's how to accomplish that:

1. Click BELOW the table and hold your left mouse button down.
2. Drag to a point ABOVE the table to highlight the original table (this will include the nested tables within).
3. Click the **Switch Borders Off** button, located in the **Extended Text Editing** area in the **Home** ribbon tab.

**Result:** *This may remove all borders, including those in the nested table; you may therefore want to highlight individual nested tables and switch borders back on as desired.*

## Unit 24: Managing Default Menus

In this section, you will learn:

- Adding a New Menu or Sub-Menu
- Copying an Existing Menu
- Adding Items to a Menu or Sub-Menu
- Creating a Description, Label, Notes or Image for an Item
- Editing Additional Menu Item Details
- Creating an Automatic Menu Item Package
- Making Changes to Menu Items in Batch

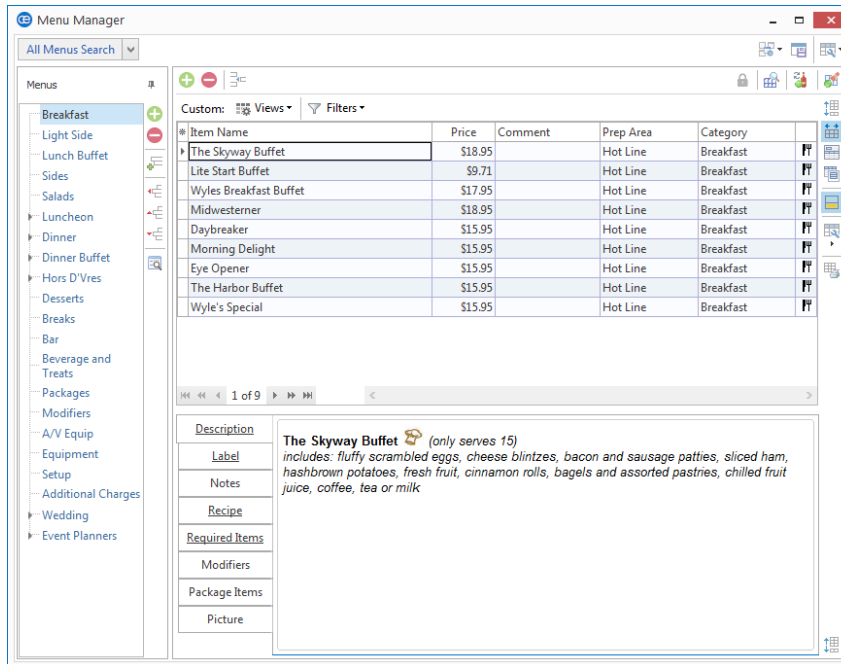


## Adding a New Menu or Sub-Menu

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

**Result:** The Menu Manager window opens.

**Note:** As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Menu Manager**.



**Tip:** If you click on 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.

2. Click the **Add New Menu** button , located along the left pane of the window.

**Result:** A confirmation prompt appears.

3. Click **Yes**.

**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.

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




**Result:** Your new menu name is saved.

5. **[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 .

6. Add new menus to your new menu as desired.

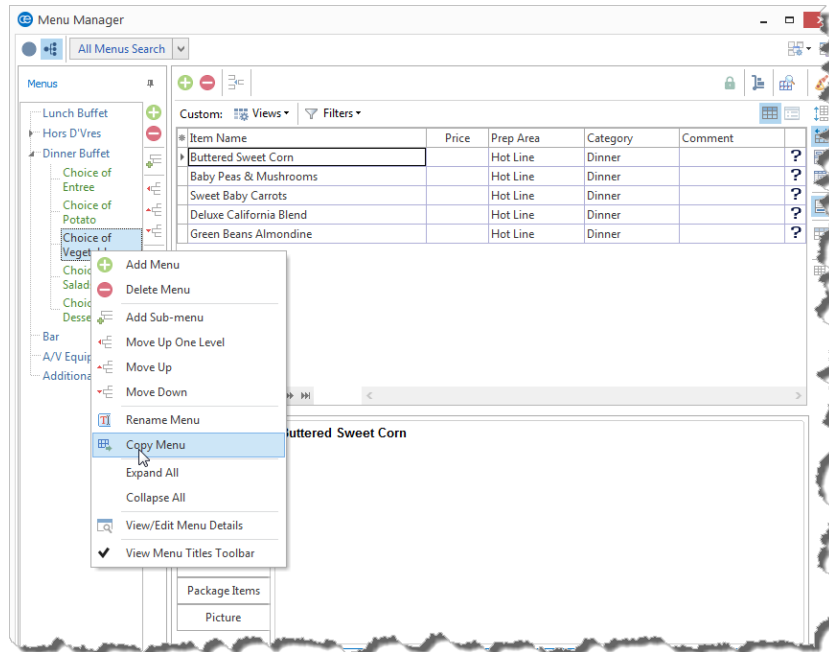
**Note:** It is recommended, when adding items to a new menu, that you take care to set the first item up with the appropriate "Type," "Category," "Prep Area," etc., because each additional item you create will mirror the first item in these settings.

- **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

1. On the left-hand side of the Menu Manager window, right-click on the title of the menu you want to copy.

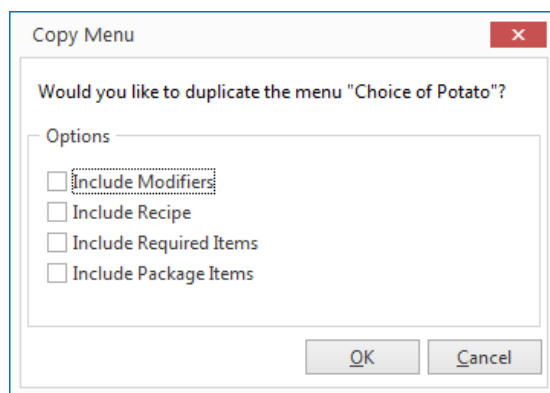
**Result:** A pop-up list of options appears.



**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.

2. Choose **Copy Menu**.

**Result:** A Copy Menu window opens, offering certain options.



3. Click into the checkbox next to any 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 Title 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 Items to a Menu or Sub-Menu

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

**Result:** The Menu Manager window opens.

**Note:** As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Menus > Menu Manager**.

2. In the left pane of Menu Manager, click on 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."

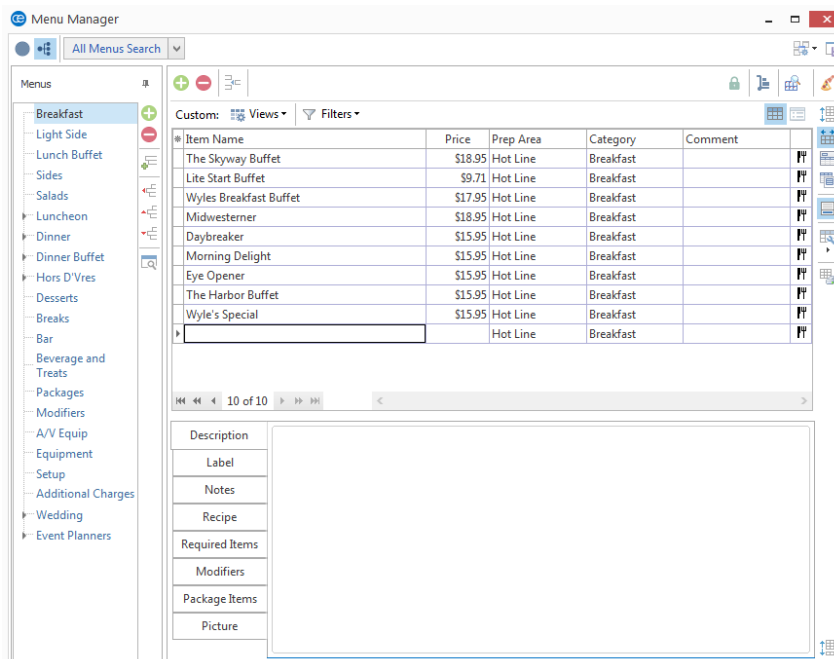
3. Click the **Add Menu Item** button , located at the top of the Menu Manager window.

**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 your screen.

**Tip:** It is strongly recommended that you establish the Item Type, Prep Area, and Category (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 that is highlighted when you click the **Add Record** button.



The screenshot shows the Menu Manager window with the 'Breakfast' menu selected in the left pane. The main area displays a table of menu items with columns: Item Name, Price, Prep Area, Category, and Comment. A new blank line has been added at the bottom of the list. Below the table is a form with fields for Description, Label, Notes, Recipe, Required Items, Modifiers, Package Items, and Picture.

Item Name	Price	Prep Area	Category	Comment
The Skyway Buffet	\$18.95	Hot Line	Breakfast	
Lite Start Buffet	\$9.71	Hot Line	Breakfast	
Wyles Breakfast Buffet	\$17.95	Hot Line	Breakfast	
Midwesterner	\$18.95	Hot Line	Breakfast	
Daybreaker	\$15.95	Hot Line	Breakfast	
Morning Delight	\$15.95	Hot Line	Breakfast	
Eye Opener	\$15.95	Hot Line	Breakfast	
The Harbor Buffet	\$15.95	Hot Line	Breakfast	
Wyle's Special	\$15.95	Hot Line	Breakfast	
		Hot Line	Breakfast	

4. Type a Item Name for the new menu item into the Item Name field.

**Note:** As a default, Menu Manager uses the Item 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.

5. Press your **[Enter]** key.

**Result:** Your cursor is moved one column to the right, most likely to the Price column.

6. Type a Price for the new item into the Price field.

7. Press your **[Tab]** or **[Enter]** key.

**Result:** Your cursor is moved one column to the right, most likely to the Prep Area field.

8. **[Optional]** Enter a Prep Area for the item, by typing directly into the field or by choosing an option from your quickpick list. "Prep Area" can be displayed on your custom prints and/or used to track your menu items.

**Note:** This field offers a custom quickpick list you can customize. See the tip for important information about setting defaults for these fields.

9. Press your **[Tab]** or **[Enter]** key.

**Result:** Your cursor is moved one column to the right, most likely to the Category column.

10. Enter a Category for the item, which can be displayed on your custom prints and/or used to track your menu items.

**Note:** This field, too, offers options from a customizable quickpick list.

11. Press your **[Tab]** or **[Enter]** key.

**Result:** Your cursor is moved one column to the right, most likely to the Comment column.

12. **[Optional]** Enter a Comment for the item, which can optionally be displayed on your various custom prints and reports, or choose an option from the drop-down quickpick list.

13. Click the down arrow next to the Item Type column (far right column) and choose an appropriate Item Type for the menu item.

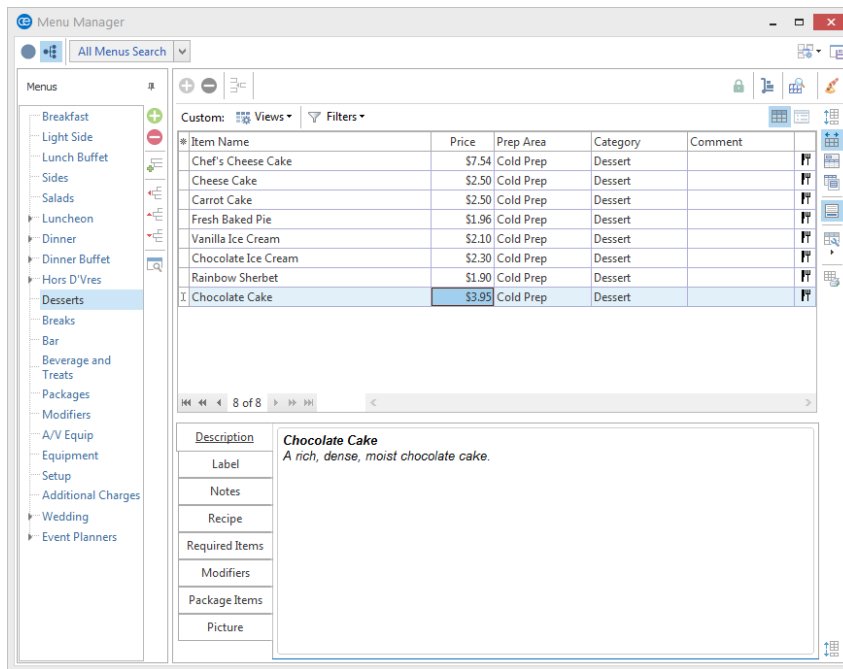
**Note:** Your available options, depending upon what you have set up, include Food, Beverage, Liquor, Equipment, Labor, Room, Delivery, Floral, Beer, Wine, or Other.

**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 Item Type be chosen for each item. See the tip for important information about default settings for this field.

14. See "Editing Additional Menu Item Details," below, for more information you can customize about this item.


## Creating a Description, Label, Notes, or Image for an Item

1. Click into the **Description** text box 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 on the **Label**, **Notes**, or **Recipe** tabs and enter text into the respective text boxes as desired.  
**Note:** Event Manager offers special prints for both menu item Labels and Recipes (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 your screen to format the text you have entered.
4. **[Optional]** Click on the **Picture** tab. Right-click within the text box 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.

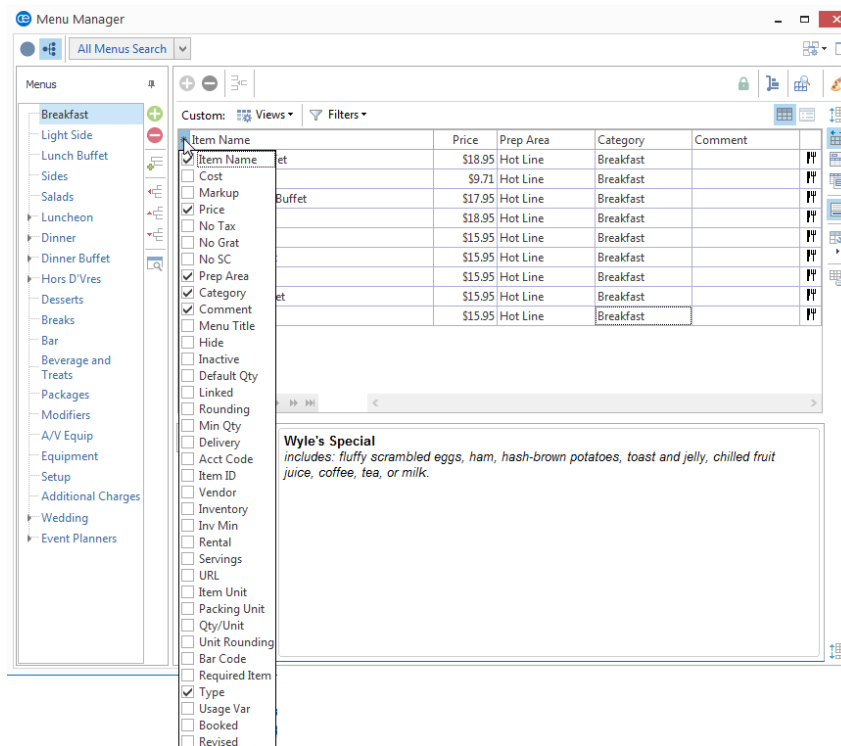
**Note:** See "Fields Available in the Menu Items Grid," below, for a list of available columns for this grid.

2. Click into 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.

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



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 outlined 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
<b>Item Name*</b>	Identifies the menu item; can be printed on event prints in lieu of or in addition to description (see below).
<b>Cost</b>	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.
<b>Markup</b>	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).
<b>Price*</b>	Indicates the price of the menu item.
<b>No Tax</b>	Offers a checkbox to make the menu item non-taxable as a default.
<b>No SC</b>	Offers a checkbox to remove service charge from the menu item as a default.
<b>No Grat</b>	Offers a checkbox to allow you to make this individual item exempt from any gratuity normally assigned to items of this Type.
<b>Prep Area*</b>	Indicates the area or personnel responsible for preparing the menu item; e.g., "Kitchen," "Bar," "Cold Prep"; can be used for tracking purposes or optionally included on prints; event menus are separated based on this field on the Production Sheet event sub-print.
<b>Category*</b>	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.
<b>Comment*</b>	Allows up to 50 characters of general comment about a menu item; can be optionally included on prints.
<b>Menu Title</b>	Lists the title of the menu the item is located in; helpful when reviewing all items from all menus simultaneously.
<b>Hide</b>	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.
<b>Inactive</b>	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.
<b>Default Qty</b>	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").
<b>Linked</b>	Offers a checkbox allowing you to link the quantity of this menu item to the guest count of an event as a default.
<b>Rounding</b>	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."
<b>Min Qty</b>	Allows you to establish a minimum quantity for an item when it is selected into an event.
<b>Delivery</b>	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.
<b>Acct Code</b>	Offers a unique identifier for the menu item; used in interfaces with third-party software.
<b>Item ID</b>	Offers a unique identifier for the menu item; used in interfaces with third-party software.
<b>Vendor</b>	Identifies a vendor responsible for providing the menu item.
<b>Inventory</b>	Offers a checkbox for you to designate a menu item as inventoried.
<b>Inv Min</b>	Allows you to establish a minimum quantity for an item in inventory when it is selected into an event.
<b>Rental</b>	Offers a checkbox for you to designate an item (such as AV Equipment, Chairs, Tables, etc.), as rental items.
<b>Servings</b>	Allows you to designate the number of servings for a particular menu item.
<b>URL</b>	Allows you to enter a website address.
<b>Item Unit</b>	Allows you to track a unit of purchase for each item and its associated unit.
<b>Packing Unit</b>	This field relates to Required Items. Allows you to tracking the quantity of the packing unit and its associated unit.
<b>Qty/Unit</b>	This field relates to Required Items/Packing Unit, above. Pertains to how many items (or servings) a packing unit can hold.
<b>Unit Rounding</b>	This field relates to Required Items/Packing Unit, above. Pertains to how you would like the Qty/Unit to be rounded.

Field	Description
<b>Bar Code</b>	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.
<b>Required Item</b>	Allows you to designate a food/service item as "required."
<b>Type*</b>	Allows you to categorize items as being "Food,""Beverage,""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.
<b>Usage Var</b>	An item's Usage is the number of the particular item that was booked in any active event.
<b>Booked</b>	Allows you to track a day or date range on which a particular menu item was booked.
<b>Revised</b>	Allows you to track a day or date range on which a particular menu item was booked.
<b>User Defined Fields</b>	You can make up your own custom fields pertaining to menu items and display them in this grid as well.
* Displayed on the grid by default.	

## 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 automatically locate and compile all of the various items in their separate menus.

### Adding Package Items to a Menu Item

1. Access Menu Manager (**Setup** sidebar > **Menu Manager**).

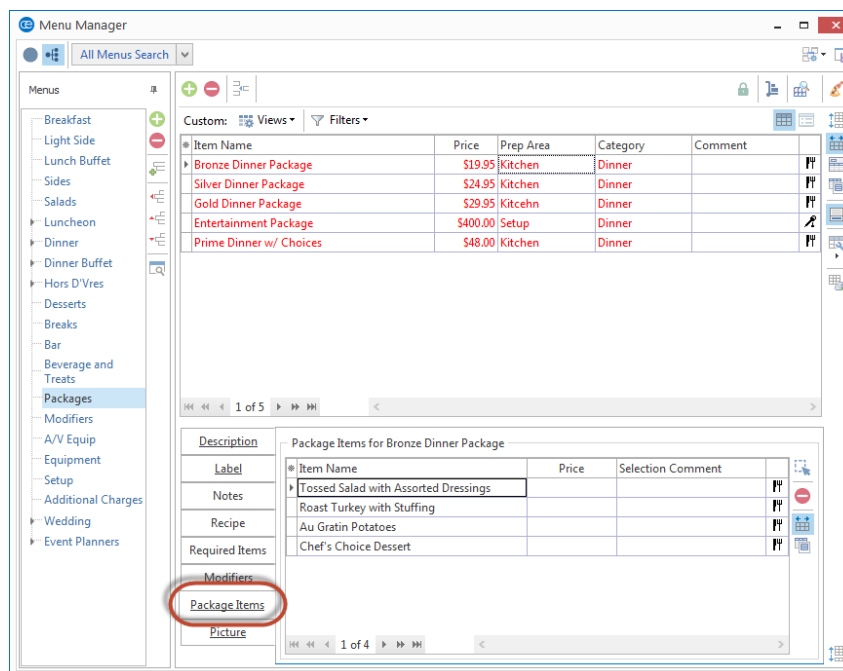
**Result:** The Menu Manager window opens.

**Note:** As an option, you can click the **Administration** ribbon tab at the top of your 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 on the **Package Items** tab, located toward the bottom of the Menu Manager.



4. Click the **Select Items** button , located at the right-hand side of the **Package Items** grid.

**Result:** The Select Menu Items For Current Event window opens.

5. In the left pane of the Select Menu Items For Current Event window, click on 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** grid 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** grid, and the Select Menu Items For Current Event window remains open.
  - Hold your mouse button down on one individual item (without moving) and drag that item from the Select Menu Items For Current Event window into the **Package Items** grid.  
**Result:** The item is inserted into the **Package Items** grid.
  - 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 into the **Package Items** grid.  
**Result:** The items are inserted into the **Package Items** grid.
  - Click the **Select Items** button at the top left of the Select Menu Items For Current Event window.  
**Result:** Any highlighted items are inserted into the **Package Items** grid, and the Select Menu Items For Current Event window remains open.
  - Click **OK**.  
**Result:** Any highlighted items are inserted in the **Package Items** grid, and the Select Menu Items For Current Event window closes.
7. **[Optional]** Add or remove a price to be associated with the package item by typing into the Price column.  
**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.
  8. Press your **[Tab]** or **[Enter]** key to move to the next field, most likely the Selection Comment field.
  9. **[Optional]** Enter a Selection Comment 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.

## 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 by 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 on an item that's not currently selected, all selected items become deselected.*
4. Choose **Special Editing > Batch Processing**.  
***Result:** The Batch Processing window opens.*

Batch Processing

General Formatting

Type		<input type="checkbox"/>
Cost		<input type="checkbox"/>
Markup		<input type="checkbox"/>
Price		<input type="checkbox"/>
Prep Area		<input type="checkbox"/>
Acct Code		<input type="checkbox"/>
Item ID		<input type="checkbox"/>
Category		<input type="checkbox"/>
Comment		<input type="checkbox"/>
Item Unit		<input type="checkbox"/>
Packing Unit		<input type="checkbox"/>
Qty/Unit	0	<input type="checkbox"/>
Unit Rounding		<input type="checkbox"/>
Vendor		<input type="checkbox"/>
Url		<input type="checkbox"/>
Usage Var	0	<input type="checkbox"/>
No Tax	<input type="checkbox"/>	<input type="checkbox"/>
No SC	<input type="checkbox"/>	<input type="checkbox"/>
No Grat	<input type="checkbox"/>	<input type="checkbox"/>
Default Qty		<input type="checkbox"/>
Rounding		<input type="checkbox"/>
Linked	<input type="checkbox"/>	<input type="checkbox"/>
Delivery	<input type="checkbox"/>	<input type="checkbox"/>
Hide	<input type="checkbox"/>	<input type="checkbox"/>
Inactive	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Item	<input type="checkbox"/>	<input type="checkbox"/>
Inv Min	0	<input type="checkbox"/>
Required Item	<input type="checkbox"/>	<input type="checkbox"/>
Description	Copy To Label	<input type="checkbox"/>
Food Service Access		<input type="checkbox"/>

OK Cancel

5. On the **General** tab of the Batch Processing window, click into 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, font size, and alignment), then click into the checkboxes at the bottom of the tab to indicate which detail of all selected menu items you want reformatted (Description, Instructions, Label, 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 process could take a few minutes.
9. Click **OK** to close the confirmation message window.



## Unit 25: Establishing System Security

In this section, you will learn:

- Enabling System Security
- Adding a New User
- Establishing User Security Settings



# Enabling System Security

It is recommended that you enable system security, which will require users to login to the program. Although the most common use of this tool is to establish specific user access settings, it also allows Caterease to track changes made and tasks performed by each individual user.

## Enabling System Security

1. Click the **Administration** ribbon tab at the top of your screen and choose **Security**.

**Result:** The Caterease Security window opens.

**Tip:** With security now enabled, each user will be required to login when opening the program.

2. Click into the checkbox next to **Enable System Security** at the top left of the window.
3. Click on the **Users** tab, and then double-click on the Default Administrator's User Name.

**Result:** The User Security Details window opens.

4. Click the **Assign Password** button  to the right of the Main Password field.

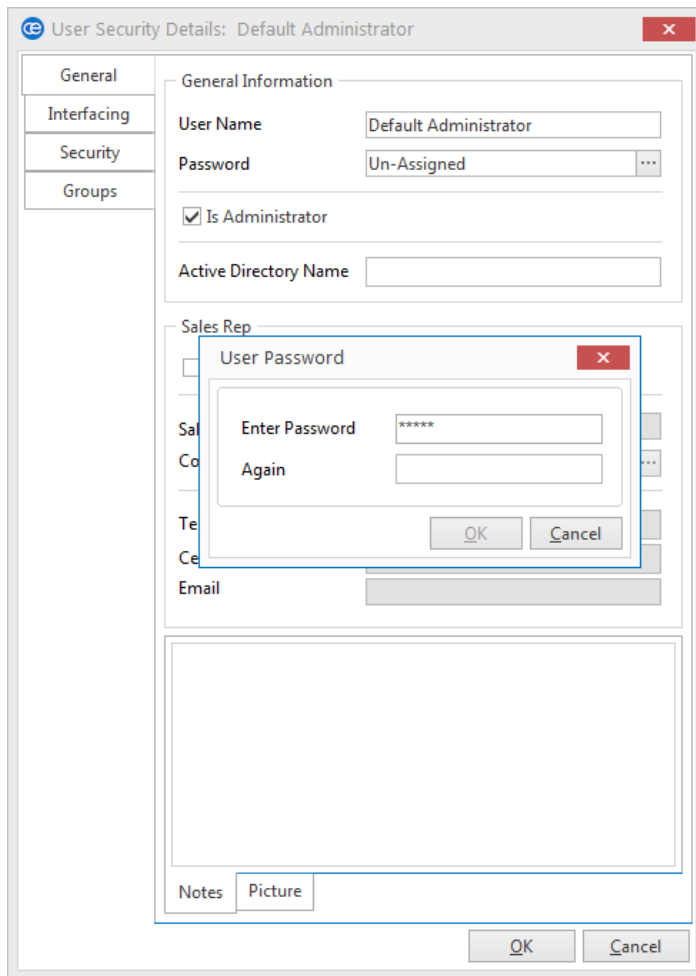
**Result:** A confirmation message appears.

**Note:** If the main password is already assigned, you can skip to Step 10, below.

5. Click **Yes** at the prompt to confirm your choice.

**Result:** The User Password window opens, prompting you to create your password and type it a second time to confirm.

**Note:** If there is already a main password assigned, you will need to enter that password now to continue.



6. Carefully type a password to serve as your main system (administrative) password (minimum of four characters, not case-sensitive).
7. Press your **[Tab]** key.  
**Result:** Your cursor moves to the next field, labeled **Again**, for you to retype the password for verification.
8. Retype the password to verify.
9. Click **OK**, or press **[Enter]**.  
**Result:** The **User Password** window closes, saving your new password.
10. **[Optional]** Click on the **Notes** tab, located at the bottom of the window, and type any desired notes into the **Notes** text box.
11. **[Optional]** Click on the **Pictures** tab, located at the bottom of the window. Right-click within the text box and choose **Load From File** to include a digital image of the administrator.  
**Note:** This picture will appear next to any instant messages sent from this user in Caterease.

12. Click on the **Security** tab, located on the left-hand side of the User Security Details window, and establish security settings for the user.
13. Click **OK** to close the User Security Details window.
14. **[Optional]** Click into the checkboxes next to any of the options to enable or disable features.
15. Click **OK** to close the window.

## Adding a New User

1. Click the **Administration** ribbon tab at the top of your screen and choose **Security**.

**Result:** The *Caterease Security* window opens.

2. Verify that **Enable System Security** (top left of the window) is selected.

**Note:** Users will not be required to log into Caterease if this option is not selected.

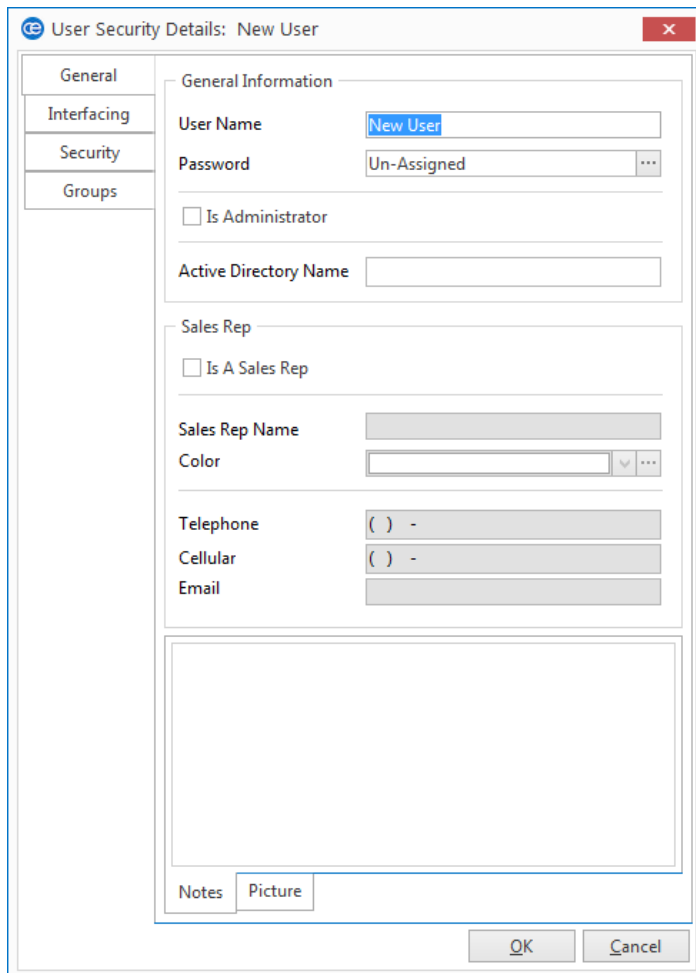
3. Click on the **Users** tab, located on the left-hand side of the window.

**Result:** A list of currently established users displays.


4. Click the **Add User** button  on the right-hand side of the window.

**Result:** The *User Security Details* window opens.

**Note:** By default, every new user you add is a member of the user group "Caterease Users," and therefore automatically inherits the permissions established in that group. Any setting listed with a red font indicates a setting that is disabled for this user because of a group (such as "Caterease Users") he belongs to.



5. Enter a User Name for the new user into the User Name field.

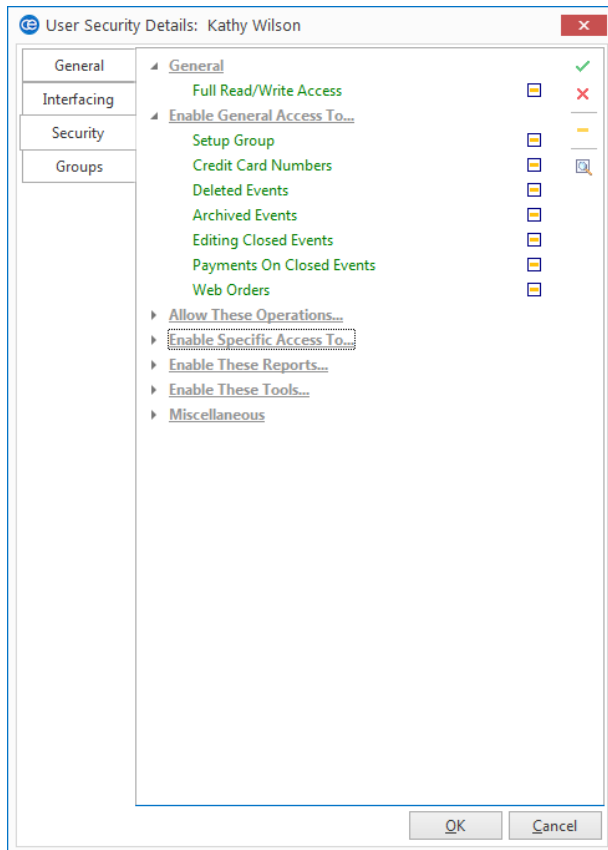
6. Click the ellipsis button , located on the right-hand side of the Password field, to assign a password to the user.  
**Result:** A confirmation message appears.
7. Click **Yes** to confirm.
8. Enter a password for the user.  
**Note:** Passwords must be a minimum of four characters, numbers and/or letters, and they are not case-sensitive.
9. Enter the same password into the field labeled Again for verification.
10. Click **OK**.  
**Result:** The password has been assigned to this user.
11. **[Optional]** Click into the Active Directory Name field and enter the username this user uses to log into Windows (or Citrix, for Caterease Connect).  
**Note:** Users with Active Directory names will not need to log into Caterease separately; after they log into Windows (or Citrix), they will be automatically recognized when loading Caterease and their specific program permissions will be established. (See "Using Active Directory" for more information.)
12. Enter the user's contact information into the contact fields: Telephone, Cellular, Email.
13. **[Optional]** Click into the checkbox labeled **Is a Sales Rep** and enter a Sales Rep Name if you would like this user's name included on the program's list of Sales Representatives.  
**Note:** You can also choose a color to be associated with this sales rep when color-coding within the program.
14. **[Optional]** Click into the **Notes** text box and enter any notes pertinent to this user or his program access level.
15. **[Optional]** Click on the **Picture** tab. Click into the **Picture** text box to load a picture of this user (for use in user-to-user messaging within the program).  
**Note:** Load an image by right-clicking within the **Picture** tab area and choosing **Load From File**.
16. Click on the **Security** tab on the left-hand side of User Security Details window and establish security settings for the user.  
**Note:** See topics below for more information.
17. **[Optional]** Click on the **Groups** tab and select the security groups to which this user belongs.  
**Note:** See topic below for more information. You can also select users into groups, as opposed to selecting groups for users.




## Establishing User Security Settings

1. From the Caterase Security window, double-click on a user's name to open the User Security Details window.

**Result:** *The User Security Details window opens.*

2. Click on the **Security** tab, located on the left-hand side of the window.



3. If necessary, click the expand button next to any group of settings to open that group.
4. Click into the checkbox next to any security setting to establish permissions, using the following guidelines:
  -  **Yellow Dash**  
This indicates that a user's group settings take priority. In other words, if a group that the user belongs to prohibits this function, then the user will be prohibited.
  -  **Green Check**  
This indicates that the user's personal settings specifically allow a function. Even if the user belongs to a group which prohibits the function, he will nonetheless be permitted based on this setting.
  -  **Red X**  
This indicates that a user's personal settings specifically prohibit a function. Even if the user belongs to a group that allows the function, he will nonetheless be prohibited based on this setting.
5. When finished, click **OK** to close the window and save the changes.

## Unit 26: Setting Up Banquet Rooms and Site Locations

In this section, you will learn:

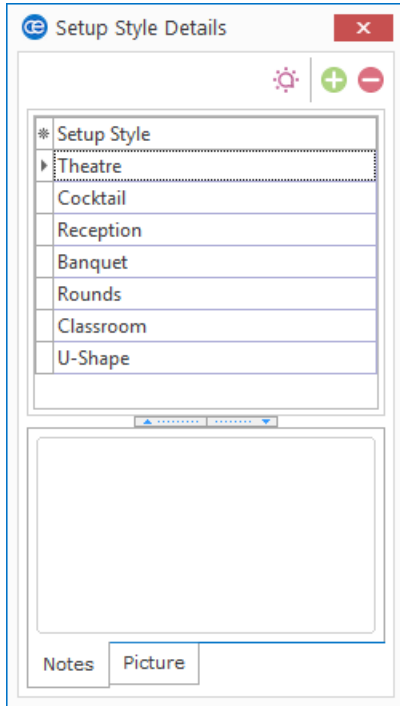
- Adding a Master List of Setup Styles
- Adding Banquet Rooms
- Establishing Setup Styles and Capacities for a Room
- Establishing Breakout Rooms for a Room
- Entering Site Locations into the Site Locations Database
- Displaying Additional Site Location Fields




## Adding a Master List of Setup Styles

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **Venues > Setup Styles**.

**Result:** The Setup Style Details window opens.



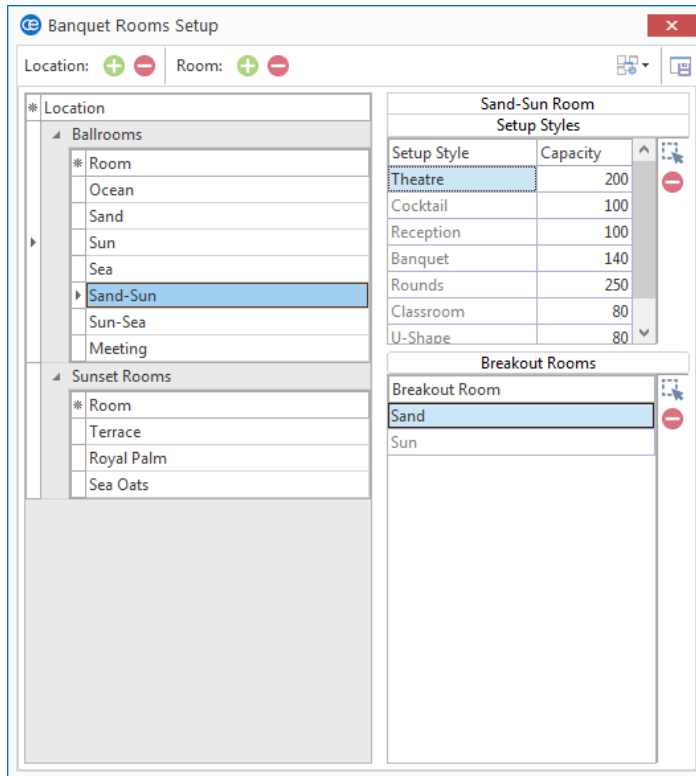
3. At the top right of the Setup Style Details window, click the **Add New Setup Style** button  .  
**Result:** A new blank line is added to your list of setup styles.
4. Type a name for the new setup style.
5. **[Optional]** Click into the text box at the bottom of the Setup Styles Details window, and type any **Notes** that pertain to your new setup style.  
**Note:** These notes do not print anywhere, and serve only as an on-screen reference.
6. **[Optional]** Click on the **Picture** tab at the bottom of the window and right-click into the text box to load a digital image of the setup style.
7. Repeat steps 3 through 6 as necessary to add further setup styles.

**Note:** If you are using the Social Tables or Room Viewer interface to diagram your banquet rooms, you might consider using the **Add Social Tables**  or **Add Room Viewer Setup Styles** button  in Step 3, above. These buttons populate the setup style list with styles Social Tables/Room Viewer will recognize, so banquet rooms can be automatically set up for you in that third-party program.

## Adding Banquet Rooms

1. Click the **Administration** ribbon tab at the top of the screen and choose **Venues > Banquet Rooms Setup**.

**Result:** The *Banquet Rooms Setup* window opens.



2. In the left pane of the window, select the location you want to add a new room to or create a new one as described above.

3. At the top center of the window, click the **Add Room** button .

**Result:** A new blank line is added to your list of room names.

**Note:** This button is identical to the **Add Location** button next to it. Be careful to choose the correct one.

4. Type a name for your new room.

**Note:** If you change the name of an existing room, you will be prompted if this will affect any existing events.

5. **[Optional]** Click the ellipsis button  to the right of the room name and enter the optional details listed in the table below.

**Note:** As an option, you can click the **Quick Column Customizing** button  at the top left of this list of rooms to have most of these additional details display as columns in the list.

6. Add appropriate setup styles, guest capacities, and breakout rooms as described below.

## Available Fields

Field	Description
<b>Room</b>	Identifies the name of the banquet room.
<b>Room Category</b>	Can be used to track a banquet room (e.g., "Ballroom," "Meeting Space," etc.). Click the down arrow to select from the <a href="#">custom quickpick list</a> .
<b>Room Chg</b>	Will be automatically retrieved into an event with this room, and can be overridden on-the-fly within the event.
<b>Room Size</b>	Indicates the square footage of a room; used for on screen reference only.
<b>Color</b>	Will act as the background color for this room when viewed in the Event Scheduler; if no color is chosen, the program will automatically assign light pastels for your various rooms.
<b>Diagram</b>	Links this room to its default diagram when interfacing with Room Viewer or Social Tables software. If you have not created any diagrams using your room diagramming software, this drop- down list will be empty.
<b>Notes</b>	Notes in this text box (bottom of screen) can be used for on-screen reference only, and do not print on any Caterease prints.
<b>Picture</b>	Right-click anywhere inside the Picture text box and browse to load a digital image of a room.

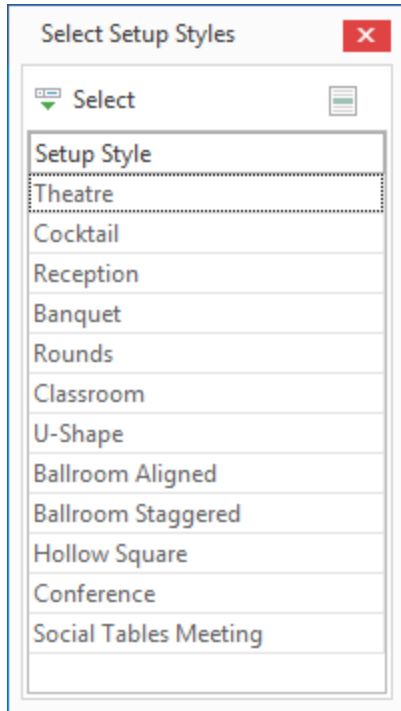
## Establishing Setup Styles and Capacities for a Room

1. In the left pane of the Banquet Rooms Setup window, click on a banquet room to select it.

2. At the top right of the display (in the Setup Styles area), click the **Select Setup Style** button .

**Result:** The Select Setup Styles window opens.

**Note:** You can customize this list. See "Adding a Master List of Setup Styles," above, for more information.



3. Highlight any setup style(s) that apply to the selected room.

**Note:** Select multiple setup styles on the list by holding your left mouse button down and dragging over any number of styles, or by holding your control **[Ctrl]** key down and clicking on as many styles as you wish.


4. Click the **Select** button at the top left of the Select Setup Styles window to add the highlighted setup styles to your banquet room.

**Result:** The highlighted setup styles are added to the Setup Styles pane of the window.

**Note:** As an option, you can double-click on any individual setup style in the Select Setup Styles window to select it. Also, you can "drag and drop" - selecting one or more setup styles, holding your left mouse button down, dragging them to the Banquet Rooms Setup window and then releasing the mouse button.

5. Click into the **Capacity** column beside each setup style (in the Banquet Rooms Setup window) and type a maximum capacity for that style in the currently selected room.

**Note:** If you prefer, you can click the down arrow at the right of the **Capacity** column and use the available calculator to determine a maximum capacity.

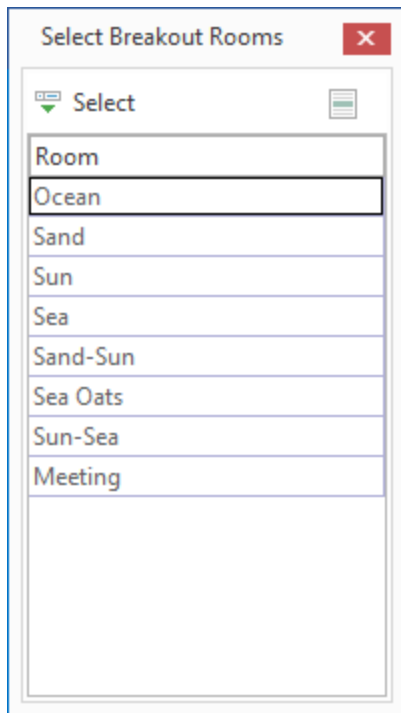
6. Click another banquet room name and repeat Steps 3-5 as desired to add setup styles and capacities to other rooms.
7. When finished, click the  at the top right of the Select Setup Styles window to close it.

## Establishing Breakout Rooms for a Room

1. In the left pane of the Banquet Rooms Setup window, click a banquet room to select it.
2. At the lower right of the display (in the **Breakout Rooms** area), click the **Select New Breakout Room(s)**

button .

**Result:** *The Select Breakout Rooms window opens.*



3. Highlight any banquet room(s) that are "breakouts" of the selected room. (For example, if you have "Ballroom ABC," then its breakout rooms might be "Ballroom A," "Ballroom B," "Ballroom C," "Ballroom A-B," and "Ballroom B-C" (all possible rooms that can be formed by "breaking" the large ballroom apart).

**Note:** *Select multiple rooms on the list by holding your left mouse button down and dragging over any number of rooms, or by holding your **[Ctrl]** key down and clicking on as many rooms as you wish.*

4. Click the **Select** button at the top left of the Select Breakout Rooms window to add the highlighted breakout rooms to your selected room.

**Result:** *The highlighted room names are added to the Breakout Rooms pane.*

**Note:** *As an option, you can double-click on any individual room in the Select Breakout Rooms window to select it. Also, you can "drag and drop" - selecting one or more breakout rooms, holding your left mouse button down, dragging them to the Banquet Rooms Setup window and then releasing the mouse button.*

5. Click another banquet room name and repeat Steps 3-4 as desired to add breakout rooms to other rooms.

6. When finished, click the  at the top right of the Select Breakout Rooms window to close it.

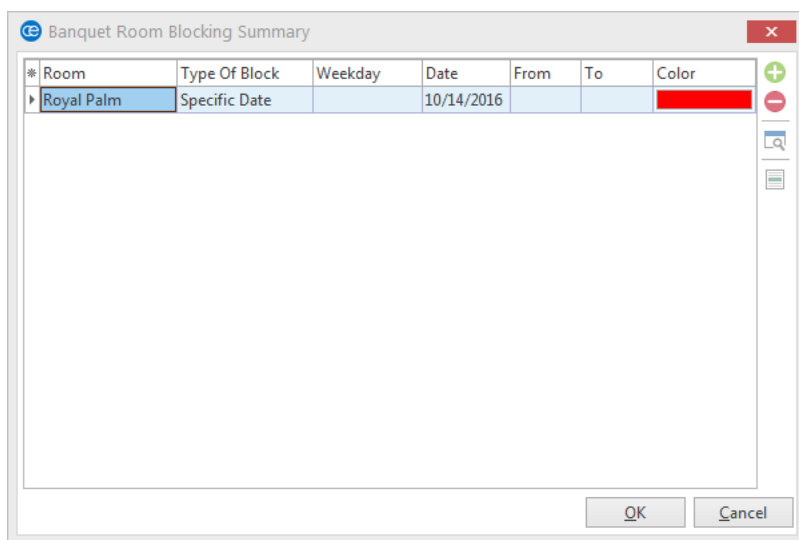
## Blocking Banquet Rooms

The steps below show how you can block banquet rooms at your company (for staff meetings, room cleanings, etc.), without actually booking events.

Note: You can also close your entire business on a specific date - or limit the number of events you can book - using the Restrict Events feature.

### Creating a New Room Blocking

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **Venues > Banquet Rooms Blocking**.  
**Result:** *The Banquet Room Blocking Summary window opens.*



3. Click the **Add New Room Blocking** button , located on the upper right-hand side of the window.  
**Result:** *The Banquet Room Blocking Details window opens.*

**Banquet Room Blocking Details**

**Blocking Type**

☐ Day Of Week

☒ Specific Date

☐ Range

**Start**

**Finish**

**Time Range**

☒ All Day

☐ Within Times

**From**

**To**

**Room To Block**

☒ All Rooms


☐ Specific Room

**Miscellaneous**

**Comments**

**Color**

**OK** **Cancel**

4. Choose **Day of Week** and select a specific day to have the room blocking recur every week on that day, or choose **Specific Date** and enter or select a date for a one-time blocking.
5. **[Optional]** If you are creating a **Day of Week** blocking, click into the checkbox labeled **Range** and choose a **Start Date** and **Finish Date** of the blocking.
6. Choose **All Day** if you want the room to be blocked for the entire day, or choose **Within Times** and enter a **From** and **To** time to block the room for a specific time range.
7. Choose **All Rooms** to block your entire facility for the day, or choose **Specific Room** and select a room from the list to block one room only.
8. **[Optional]** Enter a comment in the Comments field to describe this blocking.  
***Note:** This comment will be displayed on your venue graph in the Scheduler along with the blocking.*
9. **[Optional]** Click the down arrow next to **Color** and select a color for this room blocking to appear in on your venue graph.  
***Note:** The color will default to white; you can also click the ellipsis button  to the right of the Color field and create a custom color.*
10. Click **OK** to close the Banquet Rooms Blocking Details window.
11. Click **OK** to close the Banquet Rooms Blocking Summary window.

## Establishing Daily Event Limits

Perhaps your company has a policy that it only does one off-premise party per day. Or, perhaps you limit the number of events you hold each day with a certain theme. Or, maybe you just have a fixed limit - you can only do so many events per day. In any case, you can set these limits easily and let Caterease keep track of it all for you.

### Limiting the Daily Number of Events

1. Click the **Administration** ribbon tab at the top of your screen and select **Options**.
2. Click **Restrict Events**.  
***Result:** The Limit Events window opens.*
3. Click into the checkbox labeled **Limit Daily # Of Events**, located on the **Limit Daily #** tab.
4. Select an option under **Limit By ...**.  
***Result:** With any choice other than **All Events**, the [quickpick list](#) that corresponds to your choice is displayed on the right-hand side of the window.*  
***Note:** If you select **All Events**, simply enter a daily maximum number by clicking into the field and typing or using the up-and-down arrows to adjust the number.*  
***Important Note:** A zero value in the Max # field means there is no limit to the number of daily events.*
5. Click into each row on the right-hand side of the window and enter a maximum number (Max #) for each selection.  
***Note:** Skip this step if you chose **All Events** in Step 4, above.*
6. When finished, click **OK**.  
***Result:** The Limit Events window closes, saving your changes.*

**Limit Events**

Limit Daily #

Closed Dates

☒ Limit Daily # Of Events

Limit By...


☐ All Events  
☐ Category  
☐ Theme  
☐ Sales Rep  
☐ Business Type  
☒ Operation

Note: A zero value for the maximum number of events denotes NO LIMIT to the number of events.

Limit Events By	Max #
Charlie's Catering	1
Riverside Banquet Center	1

OK Cancel

## Setting Closed-For-Business Dates

- Click the **Administration** ribbon tab at the top of your screen and select **Options**.
- Click **Restrict Events**.  
**Result:** The *Limit Events* window opens.
- Click the **Closed Dates** tab.
- Click the **Add Record** button , located on the upper right-hand side of the window.  
**Result:** The *Closed Date Details* window opens.
- Click the radio button to the left of **Day of Week** if you would like to indicate unavailability for a certain day of the week, and choose the desired day from the drop-down list at the right-hand side of the window.  
**Result:** The **Range** option becomes available. Click into the **Range** checkbox. Access the drop-down calendar tool to the right of the Start and Finish fields to set a closed-for-business date range.
- If you did not choose **Day of Week**, click the radio button to the left of **Specific Date** and access the drop-down calendar to the right of the field to select one specific closed-for-business date.  
**Note:** "Range" is unavailable if **Specific Date** is selected.

**Tip:** Click the **View/Edit Current Closed Date** button to edit the closed dates; click the **Preview Comments** button to be able to view the comments from the *Limit Events* screen without having to open the *Details* window.

7. **[Optional]** Type a reason for the closure into the Reason field.
8. **[Optional]** Type a comment for the closure into the **Comment** text box.
9. When finished, click **OK**.

**Result:** The Closed Date Details window closes, and the user will be prompted if he/she attempts to book an event in Event Manager on a day designated as "Closed."

Closed Date Details

Closed Date Type

☒ Day Of Week

☐ Specific Date

Every Day

☒ Range

Start

6/19/2015

Finish

6/24/2015

Miscellaneous

Reason

Remodeling

Comment

Replace appliances, paint.

OK

Cancel

## Entering Site Locations into the Site Locations Database

In order to select site locations for each of your off-premise locations, you must first create a master list of site locations from which to choose.

### Adding a New Site Location

1. Click the **Setup** sidebar on the left-hand side of your screen, and click **Site Locations**.

**Result:** The Site Location Database window opens.

**Note:** As an option, you can click the **Administration** ribbon tab at the top of your screen and choose **Venues > Site Location Database**.

Site Location Database: Cambier Park

Custom: Views	Filters
Name	
Cambier Park	

**General**

Name: Cambier Park

Address: 735 8th St South

City: Naples

St/Prov: FL Postal: 34102

Telephone: (239) 595-0550

Fax: (239) 595-0551

Category: Outdoor

Website: [www.cambier.com](http://www.cambier.com)


Tax Name:

**Picture** **Description**

Amenities include:

- Open-air band shell
- Community-built playground
- Covered pavilion
- Ample parking
- Two Bocce courts
- Clay tennis courts

Notes Directions Required Items

2. In the **Home** ribbon tab at the top of your screen, click the **Add Record** button  .  
**Result:** A confirmation prompt appears.
3. Click **Yes**.  
**Result:** A New Site Location field is added to the list, with your cursor ready to type a new name.
4. Type a name for your new site location, and press your **[Enter]** key.  
**Result:** Your cursor moves the next field (Address).
5. Continue to enter additional information into each field, using your **[Enter]** key to move from one field to the next.  
**Note:** See "Entering Advanced Information," below, for information about additional site location details.
6. **[Optional]** Click your right mouse button anywhere in the **Picture** text box and choose **Load From File** to associate a digital image with this site location.

7. **[Optional]** Click on the **Description** tab at the top right of the window and enter a brief description of this location into the text box (this information is used as on-screen reference only).
8. **[Optional]** Click on the **Notes** tab at the bottom of the window and enter some general notes about the location into the text box (this information is used as on-screen reference only).
9. Click on the **Directions** tab at the bottom of the window and enter directions to the location into the text box.  
***Note:** These directions will default for each even using this site location, and can be included on event prints.*
10. Click the **Required Items** tab to associate any required items with the selected site location.
11. Repeat Steps 2-10 as desired to add additional site locations.

## Displaying an Additional Field

1. On the Site Location Database window, click your right mouse button over one of the field names in the **General** area and choose **Customize**.

**Result:** The Customize window opens.

**Note:** Do not right-click inside of fields, but rather on the tab form itself. You can also right-click elsewhere in the window, excluding within text blocks or within the detail grid at the left.

2. On the right-hand side of the Customize window, hold your left mouse button down on one of the available fields.

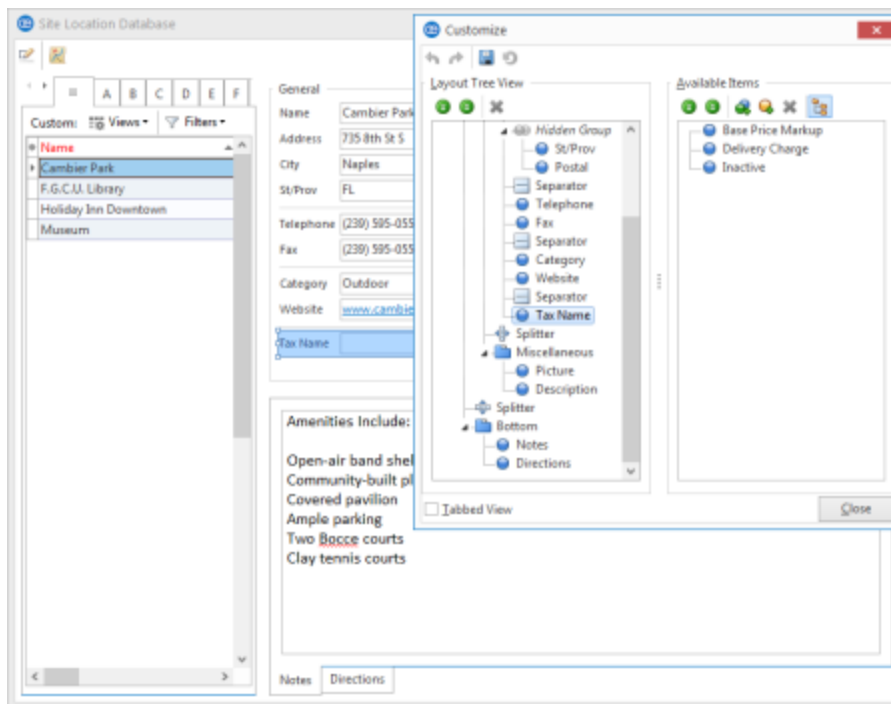
**Note:** See "Available Site Location Fields" (below) for details about such fields as Tax Name, Delivery Charge, Base Price Markup, and Inactive.

3. Drag the field into the **General** area of the Site Locations Database window, and place it beneath one of the existing fields.

**Note:** It is important to note your cursor's position as you drag this field, as it will be easier to place this field beneath another field rather than to the right of a field. If you make a mistake, click the **Undo** button

 at the top left of the Customize window and try again.

**Tip:** As an alternative, you could drag and drop the field beneath another field on the in the left ("Layout Tree View") frame of the customize window to have it appear below that field on the screen.



4. Once the field is in the desired position on the window, release your mouse button.

**Result:** The new field has been placed on the window.

5. Repeat Steps 2-4 as desired to add other fields to the window, or click **Close** on the Customize window to close the window.

6. Click the **Save Current Window Settings** button  at the top right of the Site Locations Database window to save this arrangement as the new default look for that window.

## Advanced Fields Available on the Site Locations Database Window

In addition to the general site information ("Name," "Address," "City," etc.), shown by default, the following fields are also available for display on the Site Locations Database window:

Field	Description
<b>Tax Name*</b>	Allows you to choose a unique tax/service charge schedule (see "Creating Multiple Tax Schedules" under <a href="#">Establishing Default Tax Rates</a> ) to apply to this location, to be used as a default for each new event using this location.
<b>Delivery Charge</b>	Lets you enter a default delivery charge to be pulled into events automatically when this site location is used.
<b>Base Price Markup</b>	Allows you to select from your <a href="#">default list of markup schedules</a> to have a specific price markup apply to each new event that uses this location.
<b>Inactive</b>	Allows you to designate (by clicking into a checkbox) this location as temporarily inactive, so it will not be an option to select into new events (removing the check will cause the location to become "active" again).
<b>Site ID</b>	Lets you enter a site ID as a unique identifier.
* Displayed on the screen by default.	



## Unit 27: Using Tablet View

In this section, you will learn:

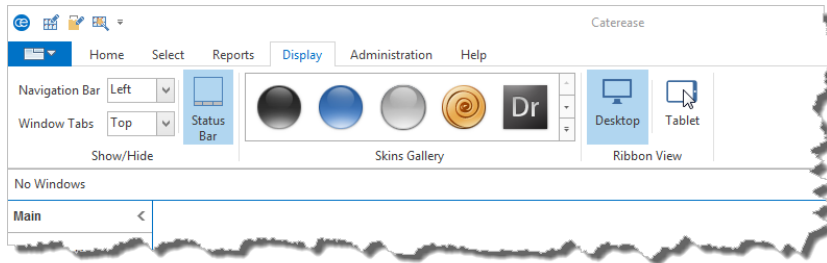
- Enabling Tablet View
- Setting Up the Tablet View



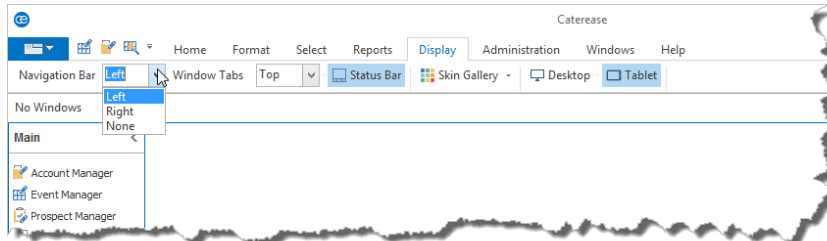
# Using the Tablet View

If you are using Caterease on a tablet or even a small laptop screen, you might want to try our “Tablet View” to make the most of your limited screen real estate.

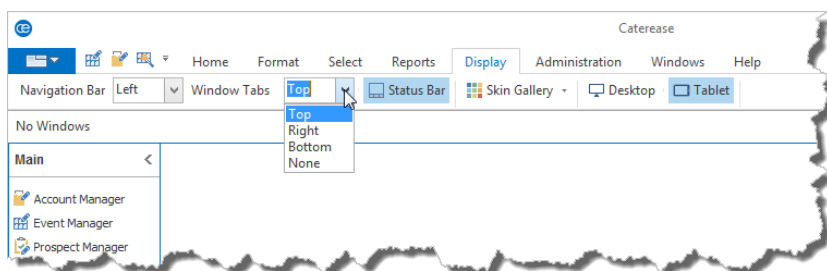
1. Click the **Display** ribbon tab at the top of your Caterease screen.



2. Choose the **Tablet** option on the far right-hand side.  
**Result:** *Instantly, ribbon tabs are condensed to save space.*
3. Click the down arrow to the right of the Navigation Bar field at the top left-hand side of your screen.  
**Result:** *A drop-down menu opens.*
4. Choose to move the Navigation Bar to the left side or the right side of the screen. Remove the Navigation Bar from the screen altogether by choosing None.



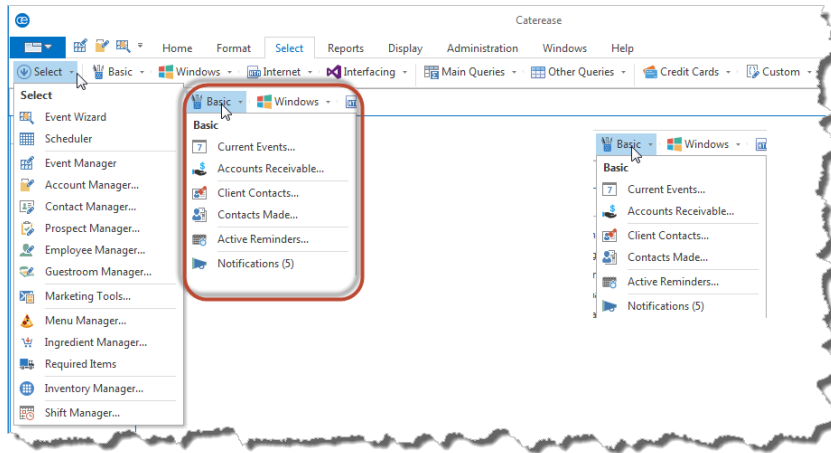
5. Click the down arrow to the right of the Windows Tabs field at the top of the screen.  
**Result:** *A drop-down menu opens.*
6. Choose to move the Windows Tabs to the top, bottom, or right side of the screen. Remove the Window Tabs from the screen altogether by choosing **None**.



7. Click the **Status Bar** button at the top of the screen to make the status bar disappear or reappear.

8. Open various Managers and tools by clicking the **Select** ribbon tab at the top of your Caterease screen and choosing either the **Select** button or the Basic button.

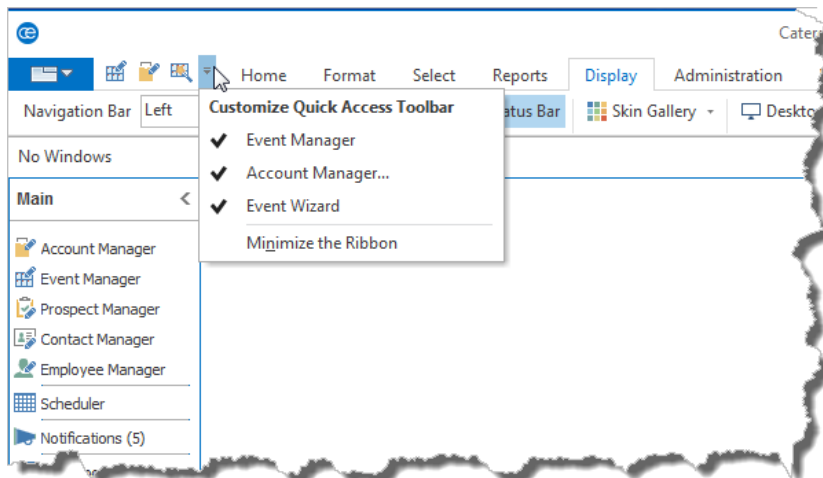
**Result:** The **Select** drop-down menu lists the various managers, the Event Wizard, and the Scheduler tools. The **Basic** drop-down menu gives you access to various queries.




9. Control the Customizable Quick Access Toolbar by clicking the **More Buttons** button at the top left-hand side of your screen.

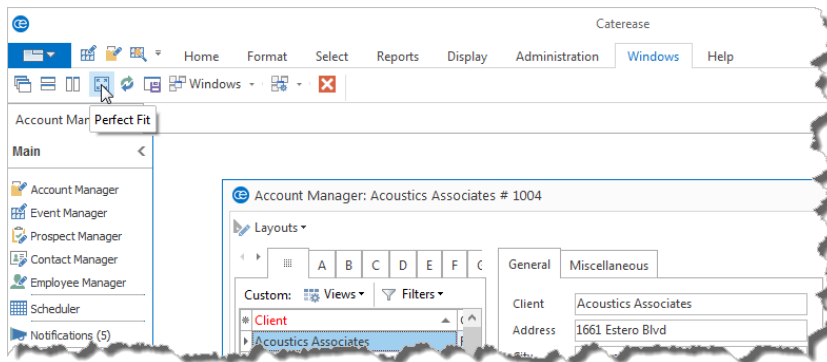
**Result:** A drop-down menu with options appears.



10. Choose to show the quick-click icons for Event Manager, Account Manager, or the Event Wizard. You can also choose **Minimize the Ribbon** to increase screen space even more.



11. Once you open a window, click the **Windows** ribbon tab.

12. Click the **Perfect Fit** button  , located on the left-hand side of your screen, to stretch the window out as large as it can be, to facilitate easier use on a tablet or other small screen.



13. After you have finished configuring your new settings, save them by clicking the **Save Current Windows Settings** button  to the left of the **Windows** button.
14. Exit out of all windows, and then click the **Windows** ribbon tab. Click the **Save Current Windows Settings** button  so the desktop defaults to this tablet view.