caterease™
catering & event management software

Caterease Tutorial

Customizing the Screen Displays

Table of Contents

Caterease Tutorial: Customizing the Screen Displays

Unit 1: Customizing the Event Manager Display

Objectives:

Upon completing this unit, you will be able to:

- *Arrange and space fields on the Event Manager screen.*
- *Stretch and shrink fields on the Event Manager screen.*
- *Insert spacers, splitters, and separators onto the Event Manager screen.*
- *Create new groups for fields and organize existing fields on the Event Manager screen.*
- *Create new tabs.*
- *Modify and save your new screen layout.*

Customizing the Event Manager Display

Concept:

You can customize the various windows throughout Caterease. Fields can be added, removed, or rearranged, and entire layouts can be changed so that different sections of information appear across the screen horizontally, vertically, or grouped into separate tabs. You can even save multiple layouts and easily navigate among them.

Because the variations on this subject are endless, this manual is written as a brief tutorial, separated into four sections, to expose you to the many options that are available to you. Please refer to the corresponding video when working through the topics of this tutorial.

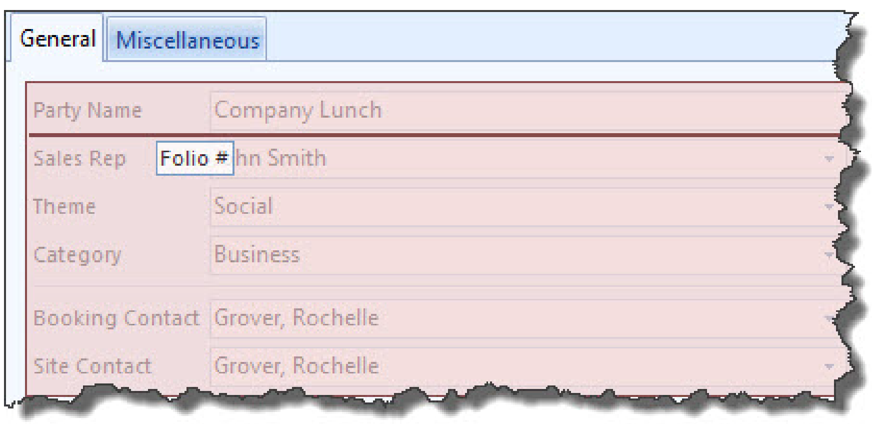
Arranging and Spacing Fields on the Screen

1. Open Event Manager.
   Note: *This topic assumes you are using the default layout of Event Manager.*
2. Right-click anywhere beneath the Event/Sub-Event buttons on the screen.
   Note: *Do not right-click within fields or text boxes, but rather on areas of the screen that do not allow data entry.*
3. Choose **Customize.**
   Result: *The Customize window displays.*

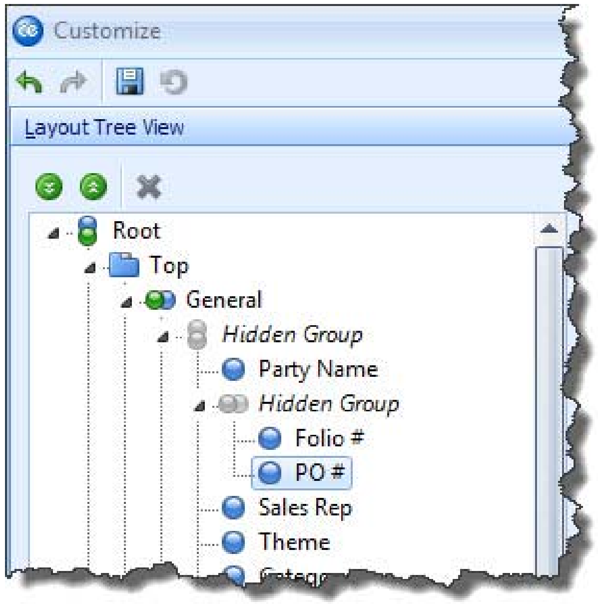
Note: The left-hand pane of this window, Layout Tree View, lists fields and other screen elements already displayed on the screen; the right-hand pane, Available Items, lists other objects that can be placed on the screen.

4. Hold your left mouse button down on the Folio # field in the Available Items pane on the right-hand side of the Customize window.
5. Drag this field onto the left-hand side of the **General** tab, but do not drop it yet.
   Note: *Because objects on this screen exist in groups, it is important to carefully note where you are dropping things you drag in. As you move this Folio # field over the* ***General*** *tab, note that you can place it above certain fields, below them, to either side of them, as well as even using this new field to create a whole new tab in addition to the existing* ***General*** *and* ***Miscellaneous*** *tabs.*
6. Carefully drop the Folio # field below the Party Name field.

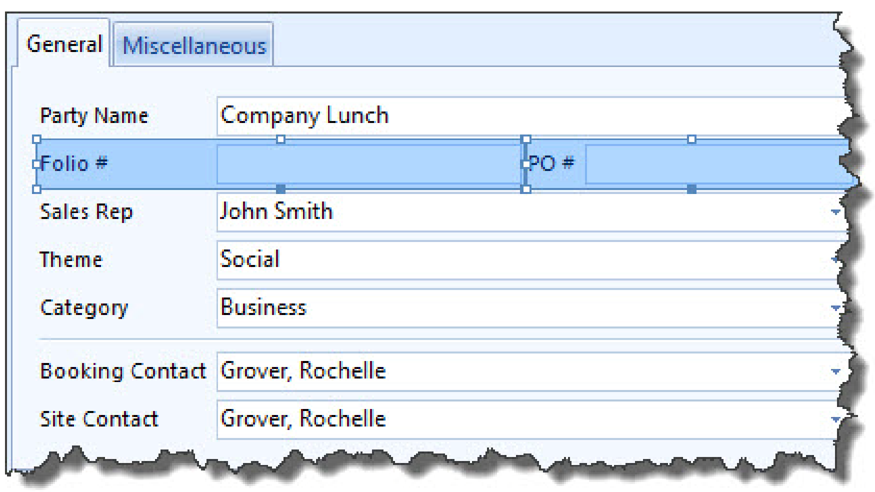
   Note: *If you make a mistake, click the* ***Undo*** *button* *, located at the top left-hand side of the Customize window and try again.*



7. Hold your left mouse button down on the PO # field, also in the right-hand pane of the Customize window.
8. Drag this field and drop it to the right of your new Folio # field.
   Result: *Both fields appear, but they are not evenly spaced on the screen.*
   Note: *Please note in the Layout Tree View pane (left-hand side of the Customize window) that a Hidden Group has been automatically created to house these two fields. Because fields are displayed vertically on the screen, by default, when you deliberately make them horizontal, a new "hidden group" must be created. (These groups will be automatically deleted if you remove horizontal fields.)(See image on next page.)*



9. Click the **caption** (name) of the Folio # field, hold the **[Ctrl]** key down on your keyboard, and click the **caption** of the PO # field to select both simultaneously.
10. Right-click over the fields and choose **Horizontal Alignment > Client** to spread the fields out evenly within their current group on the left-hand side of the **General** tab.
    Note: *You are also welcome to stretch and shrink the height and width of the Event Manager window.*

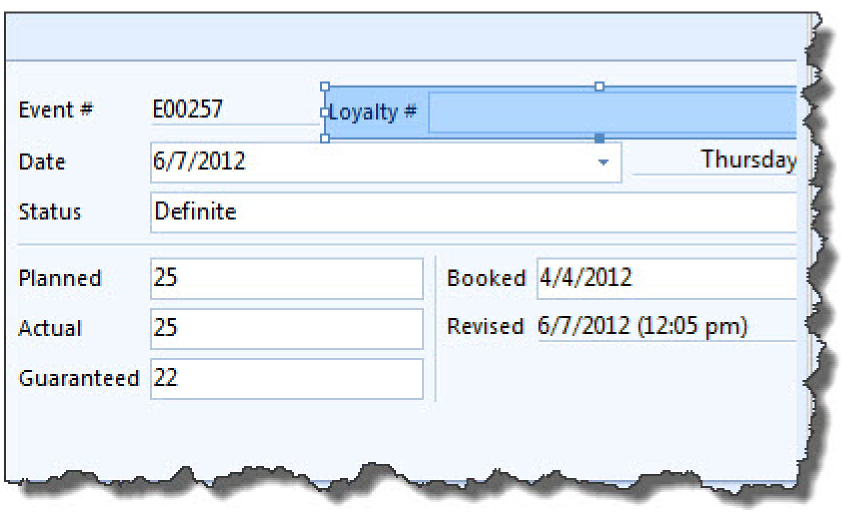


11. When finished, click **Close**, located on the lower right-hand side of the window.

***Note:** If you want this new layout to be the new look for the program, you must click the **Save Window Settings** button at the top right-hand side of the window.*

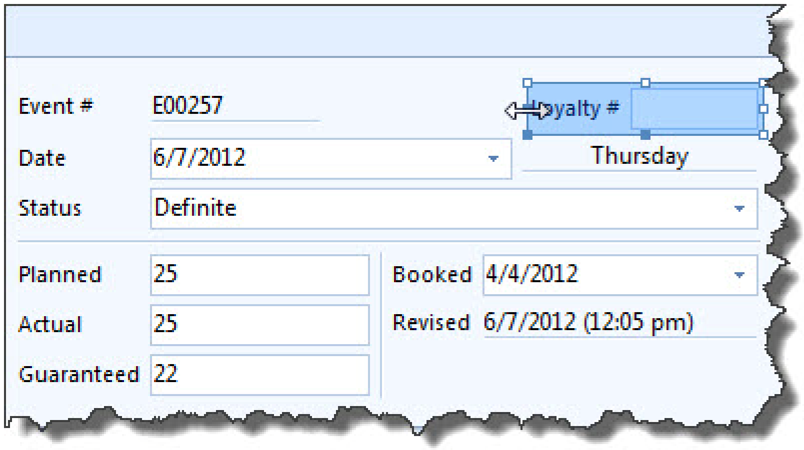
Stretching and Shrinking Fields

1. If the Customize window is not open, right-click on your Event Manager screen anywhere beneath the **Event**/**Sub-Event** buttons and choose **Customize**.
   ***Result:** The Customize window opens.*
   ***Note:** Remember, do not right-click within fields or text boxes.*
2. On the right-hand side of the Customize window, hold your left mouse button down on the <u>Loyalty #</u> field.
3. Drag the field onto your screen and drop it to the right of the <u>Event #</u> field, on the right-hand side of the **General** tab.
   ***Result:** The field is dropped in place, but does not fit horizontally on the tab.*
   ***Note:** Remember to pay careful attention to where you drop the field. If you make a mistake, click the **Undo** button, at the top left of the Customize window, and try again.*

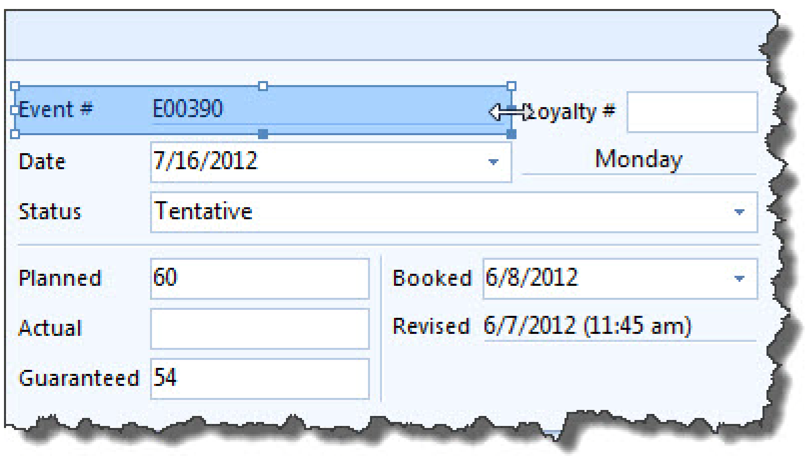


4. Right-click the <u>Loyalty #</u> field on the screen and choose **Horizontal Alignment** > **Right**.
   ***Result:** The field is now aligned with the right edge of its group (the right-hand side of the **General** tab), and can now be stretched or shrunk by dragging the frame that surrounds it.*
5. Grab the left edge of the frame surrounding the <u>Loyalty #</u> field and drag to the right to shrink the width of the field to match the <u>Day</u> field underneath it.

Result: *The field shrinks, and the right edge of the* **General** *tab on the screen comes back into view.*



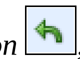
6. Click the Event # field and drag its right edge to stretch it to the same width of the Date field underneath it.

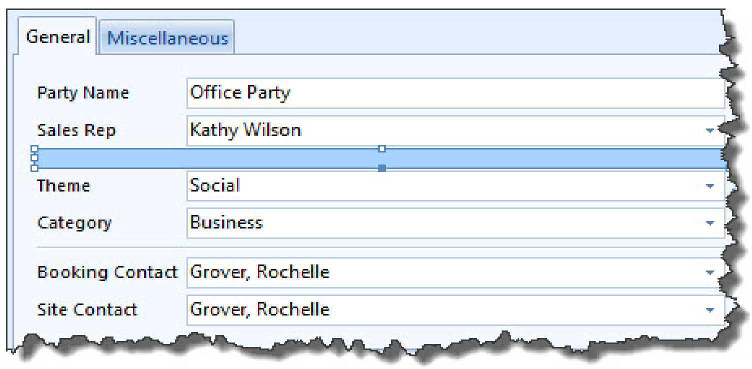


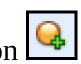
7. When finished, click **Close** on the Customize window.

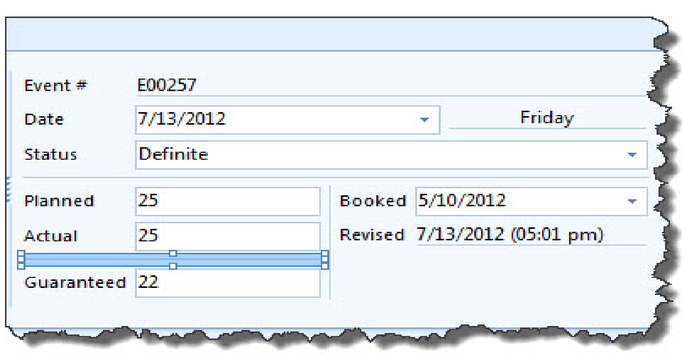
Inserting Spaces, Splitters, and Separators

1. If the Customize window is not open, right-click on your Event Manager screen anywhere beneath the Event/Sub-Event buttons and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. On the top right of the Customize window, click the **Add Auxiliary Item** button .

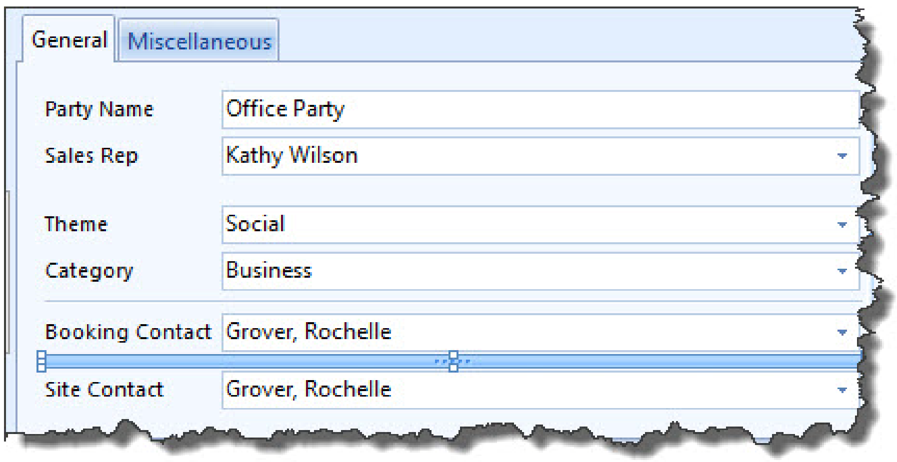
3. Choose **Add Empty Space Item**.
   Result: *A new Empty Space Item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
4. Hold your left mouse button down on the new item and drag it and drop it below the <u>Sales Rep</u> field on the left-hand side of the **General** tab on the Event Manager screen.
   Result: *The item adds blank space below the field, and can be stretched and shrunk to increase or decrease the space.*
   Note: *Remember to pay careful attention to where you drop the item. If you make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*



5. Click the **Add Auxiliary Item** button  again (as in Step 2) and choose **Add Separator Item**.
   Result: *A new Separator item is added to the top of the Available Items pane on the right-hand side of the Customize window.*
6. Hold your left mouse button down on the new item and drag it and **<u>carefully</u>** drop it below the <u>Actual</u> guest count field on the right-hand side of the **Gen-eral** tab on the Event Manager screen.
   Result: *The item adds a separator line below the field.*
   Note: *Notice, as you drag, that the size of the separator line adjusts automati-cally, depending on the width of the fields it is separating, and even automati-cally becomes a vertical line if placed beside a field rather than above or below it.*



7. Click the **Add Auxiliary Item** button  again and choose **Add Splitter Item**.
   Result: *A new Splitter item is added to the top of the Available Items pane on the right-hand side of the Customize window.*
8. Hold your left mouse button down on the new item and drag it and **carefully** drop it below the Booking Contact field on the left-hand side of the **General** tab on the Event Manager screen.
   Result: *The item adds a splitter line below the field.*
   Note: *Splitter lines are often used to separate entire groups of fields, and can be placed horizontally or vertically on the screen.*



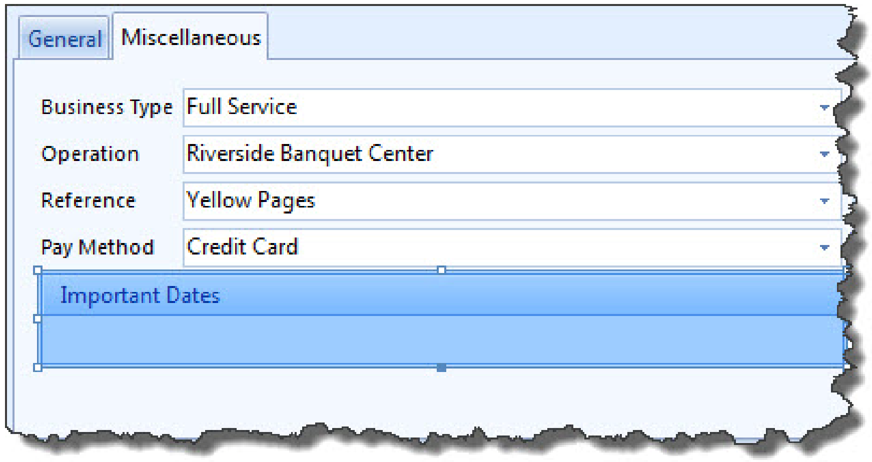
9. When finished, click **Close** on the Customize window.

Creating New Groups for Fields

1. If the Customize window is not open, right-click on your Event Manager screen anywhere beneath the Event/Sub-Event buttons and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*

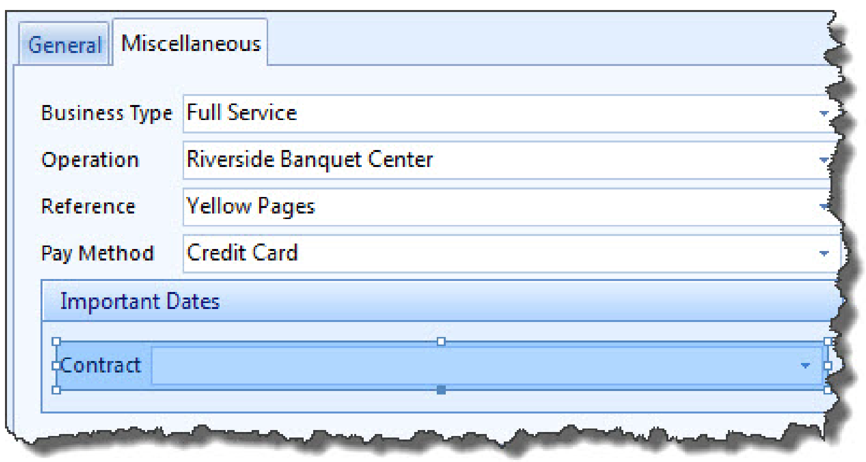
2. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
3. Click the new item to edit its name, type **Important Dates** and press **[Enter]**.
   Note: *If necessary, you can press your **[F2]** key to rename the item.*
4. Click the **Miscellaneous** tab on your Event Manager screen.
   Result: *That tab and its contents are displayed.*
5. Drag the new group item onto your Event Manager screen and place it on the lower left-hand side of the **Miscellaneous** tab, below the Pay Method field.
   Note: *If the* **Miscellaneous** *tab is not currently displayed, drag the group item*

on top of the tab itself first to display that tab's contents, then drag into position at the bottom left.



6. In the Available Items pane of the Customize window, hold your left mouse button down on the Contract field.
7. Drag the Contract field onto the screen and drop it inside your new Important Dates group, being careful to place it **within** the group as shown below.

Tip: *This group will now move together as one object, if you drag it to another position on the screen or remove it by dragging it back to the Available Fields pane of the Customize window.*

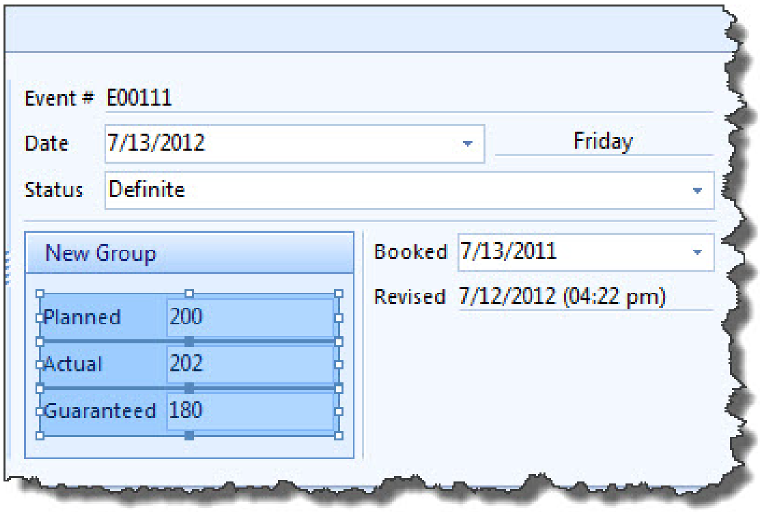


8. Repeat Steps 6 and 7 to place the Definite and Closed fields within the Important Dates group, as well.
9. When finished, click **Close** on the Customize window

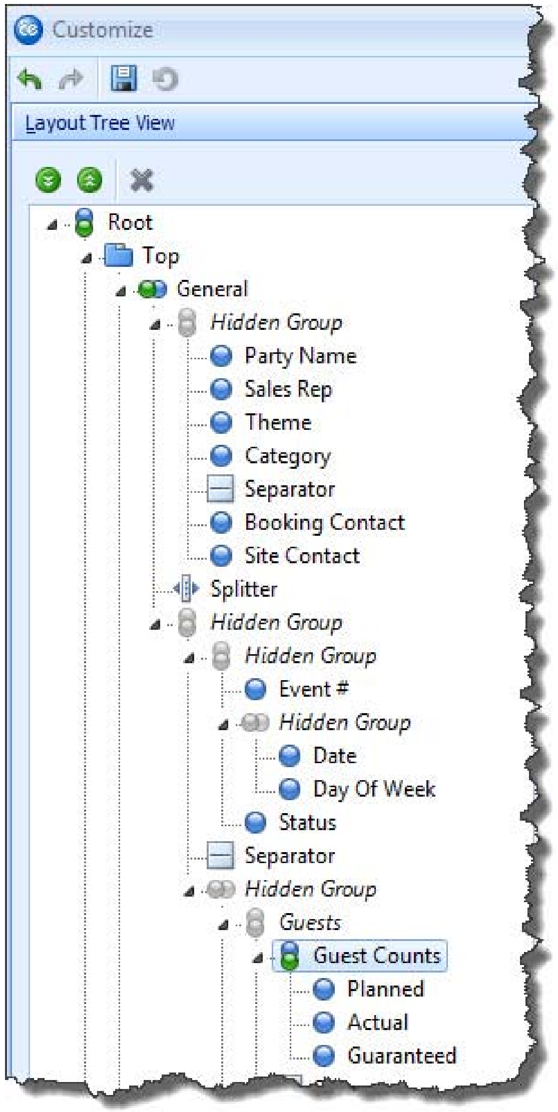
Organizing Existing Fields into Groups

1. If the Customize window is not open, right-click on your Event Manager screen anywhere beneath the Event/Sub-Event buttons and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*

2. Click the **General** tab on the Event Manager screen, if it is not already displayed.
   Result: *That tab and its contents are displayed on the screen.*
3. In the **General** tab on the screen, click the Planned guest field to select it.
4. Hold your **[Shift]** key down and select the Actual and Guaranteed fields.
5. Right-click the fields and choose **Group**.
   Result: *The selected fields are placed in a group with the default title New Group.*



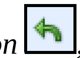
6. Click the name **New Group** in the Layout Tree View pane of the Customize window.
7. Click the name again, or press the **[F2]** key on your keyboard to rename.
8. Type the name Guest Counts and press your **[Enter]** key.
   Result: *The new group heading is updated on the screen, with your new name. (See image on following page.)*



9. When finished, click **Close** on the Customize window.

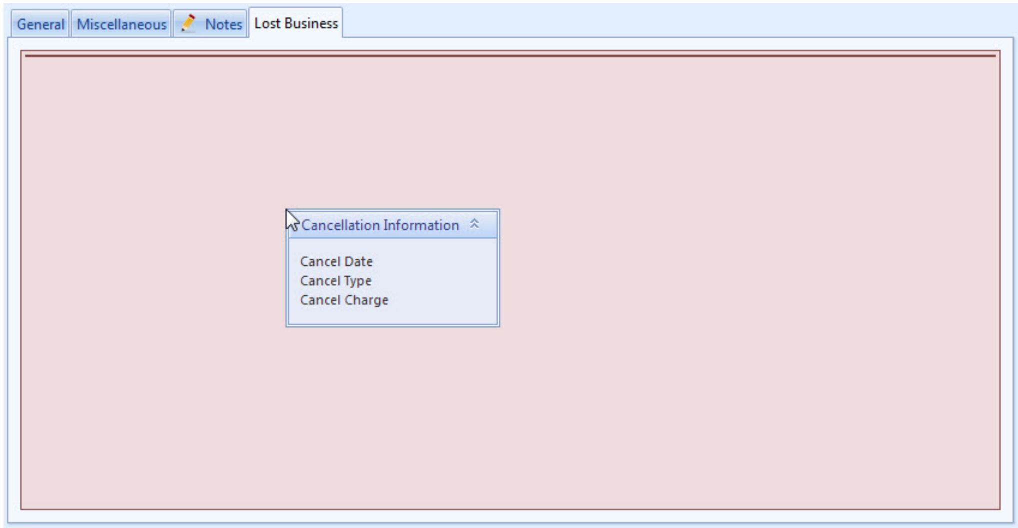
Creating New Tabs

1. If the Customize window is not open, right-click on your Event Manager screen anywhere beneath the **Event**/**Sub-Event** buttons and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Hold your left mouse button down on the Notes text box at the bottom of the Event Manager screen and drag and drop it to the right of the **Miscellaneous** tab, making it an additional tab.
   Note: *Remember to pay careful attention to where you drop the text box (see*

*image below). If you make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*

3. At the top of the Layout Tree View pane on the Customize window, right-click the Top group.
4. Choose **Vertical Alignment** > **Client**.
   Result: *The tabs stretch vertically to fill that area of the window.*
5. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
6. Click the new item to edit its name, type Lost Business, and press **[Enter]**.
   Note: *If necessary, you can press your **[F2]** key to rename the item.*
7. Drag the new group item onto your Event Manager screen, carefully placing it to the right of the new **Notes** tab.

8. In the Available Items pane of the Customize window, hold your left mouse button down on the group heading **Cancellation Information**.
9. Drag the heading and drop it (and its corresponding fields) inside your new **Lost Business** tab, being careful to place it ***within*** the tab, as shown on the following page.

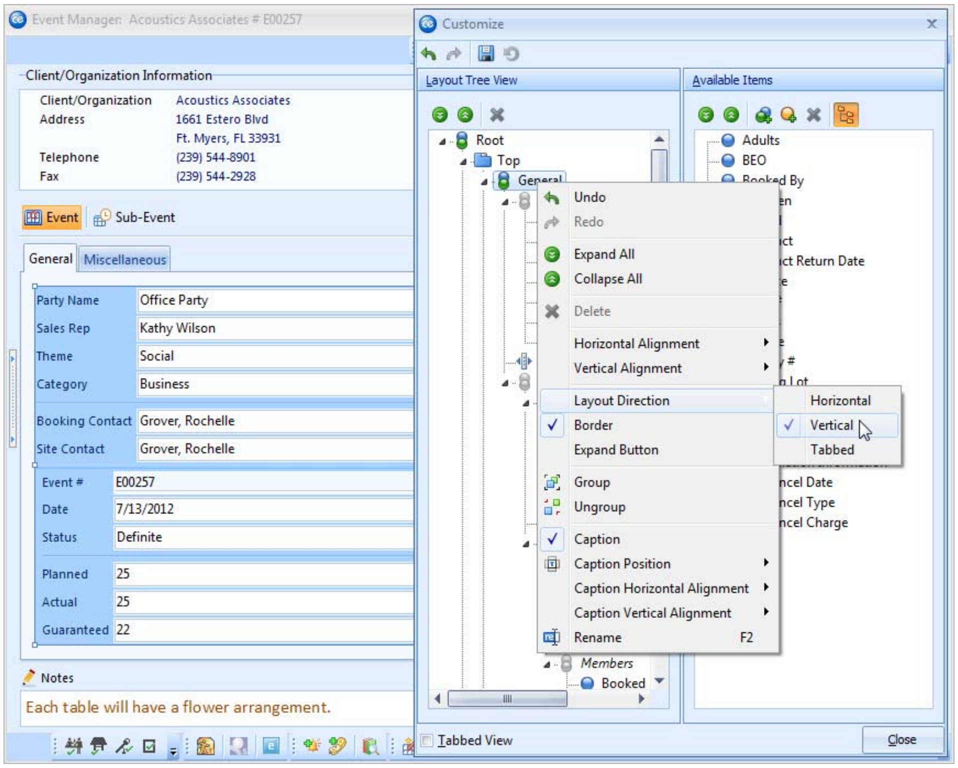


10. When finished, click **Close** on the Customize window.

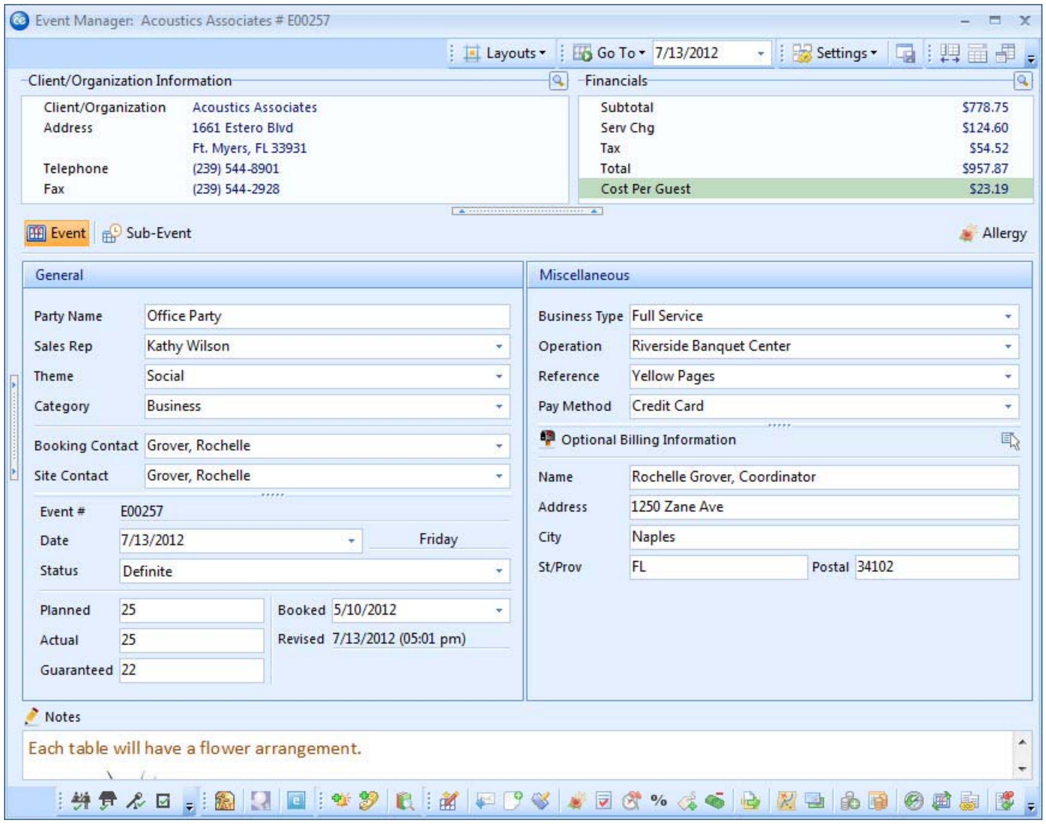
Changing Screen Layout

1. Open Event Manager in its default layout.
   Note: *If you have changed the default layout using earlier topics in this tutorial, you can close Event Manager without saving your window settings and reopen it. You can also continue here with a layout other than the default; however, images in this topic may look different than the images on your screen.*
2. Right-click on your Event Manager screen anywhere beneath the Event/Sub-Event buttons and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
3. In the Layout Tree View pane of the Customize window, right-click the General group.
4. Choose **Layout Direction** > **Vertical**.
   Result: *Fields on the* **General** *tab of your Event Manager screen are now arranged vertically, as opposed to in two groups horizontally as in the default layout.* (See image on following page.)

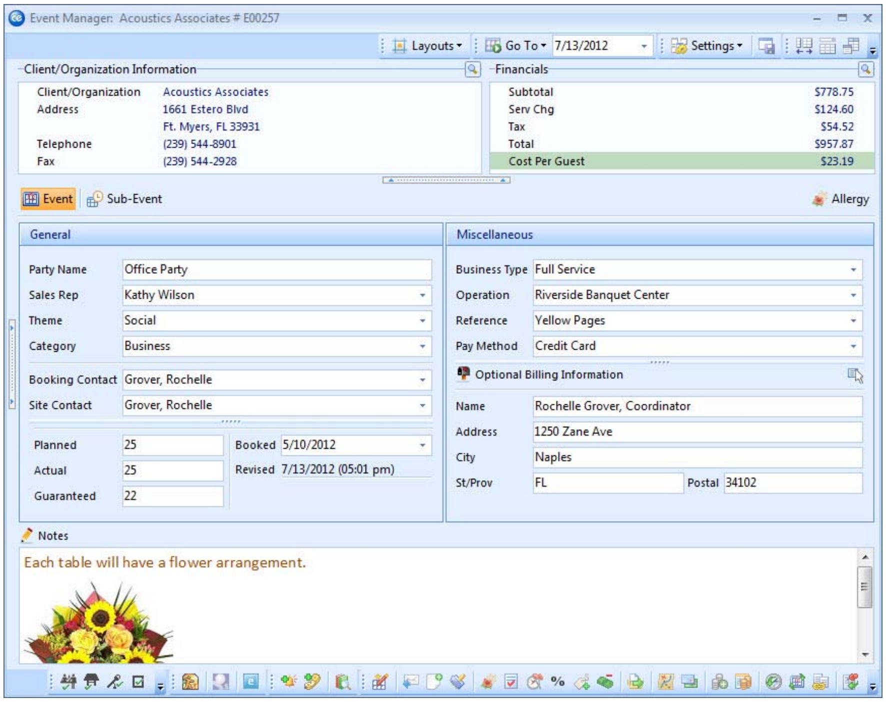
Tip*: Fields can also be rearranged by dragging and dropping them within the Customize window (either moving them from the Available Items to the Layout Tree View pane or repositioning them in the Layout Tree View pane itself).*



5. In the Layout Tree View pane of the Customize window, right-click the Miscellaneous group and choose **Layout Direction > Vertical**.
   Result: *Fields on the* **Miscellaneous** *tab are now arranged vertically, as well.*
6. At the top of the Layout Tree View pane, right-click the **Top** group and choose **Layout Direction > Horizontal**.
   Result: *The General and Miscellaneous groups are no longer displayed as separate tabs, but rather horizontally across the screen.*
7. In the Layout Tree View pane, right-click the **General** group and choose **Horizontal Alignment > Client**.
8. In the Layout Tree View pane, right-click the Miscellaneous group and choose **Horizontal Alignment > Client**.
   Result: *The two groups are now evenly spaced across the screen.* (See image on following page.)

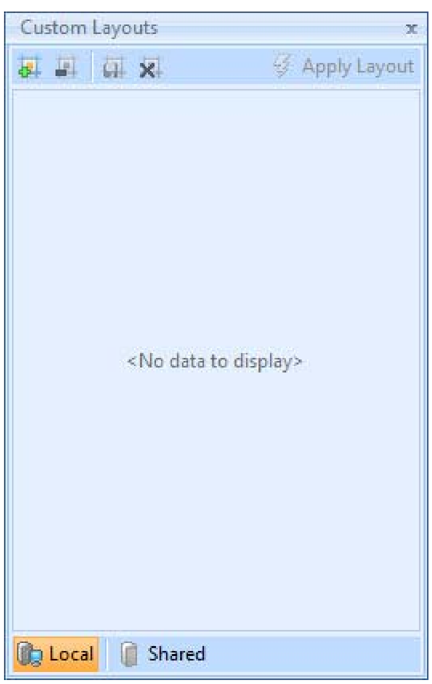


9. Hold your left mouse button down on the <u>Event Number</u> field on the screen and drag it and drop it into the Available Items pane on the Customize window.
   Result: *The field is removed from the screen.*
   Note: *You can also drag fields from the Layout Tree View pane into the Available Fields pane to remove them*
10. Repeat Step 9 to remove the <u>Event Date</u>, <u>Day</u>, and <u>Status</u> fields, as well.
11. In the Layout Tree View pane of the Customize window, click the <u>Guaranteed</u> guest field.
12. Click the field again, or press **[F2]** on your keyboard to rename the field.
13. Enter seven (7) spaces after the word Guaranteed and press **[Enter]**.
    Result: *The data-entry portion of the field has moved over to line up with fields above it on the Event Manager screen.* (See image on following page.)
14. When finished, click **Close** on the Customize window.



Saving Custom Layouts

1. Customize the Event Manager screen based on the topics above.
2. Click the **Layouts** button at the top center of the Event Manager window and choose **Custom**.
   Result: *The Custom Layouts window displays.*



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:*** *Local layouts are only available to you as a user (from any computer).*

__Tip:__ Switch between custom layouts in Event Manager by clicking the __Layouts__ button at the top of the window and selecting a layout name (not available in Express version).

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 the layout name and choosing* ***Copy From Current****.*
5. Type a name for new layout and click the **Save Current Layout** button .
6. Click the X at the top right of the Custom Layout window to close it.

Table 1.1: Event Manager Fields

Field	Description
Party Name	Used to identify an event; especially helpful when one client has multiple events.
Sales Rep	Shows the sales representative responsible for the event.
Theme	Allows you to track events by theme.
Reference	Lets you track your company's various marketing strategies; shows why the client booked this event (how they heard of you).
Category	Gives you an extra field for categorizing and tracking events; can be renamed to suit your specific business needs.
Booking/Site Contact	Identifies the contact people for the event; usually these names are directly associated with the client, and can be selected instead of repetitively typed.
Event #	Offers a unique identifier for the event; this number is automatically assigned by the program.
Status	Indicates the status of the event — *Prospective, Definite, Tentative, Cancelled*, or *Closed*.
Cancel Type/ Date	Lets you track why and when you lost business; available as sub-fields of the Status field.
Event Date	Indicates the date on which this event will or did take place.
Booked/Revised Date	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.
Guests	Does not allow data-entry; displays the Actual guest count, if one exists, and the Planned or Guaranteed count if one does not.
Planned	Indicates the number of guests the customer is planning for the event.
Actual	Indicates the actual number of guests who attended (or will be attending) the event.
Guaranteed	Indicates the minimum number of guests the customer is guaranteeing for the event; can be an automatic percentage of the Planned guest count.
Business Type	Allows you to categorize events based on differing business models or if your company does business as more than one enterprise.
Operation	Allows you to separate events based on DBA's, or different businesses or locations you might be running.
Pay Method	Identifies how the customer will pay (or paid) for the event.

Table 1.1: Event Manager Fields

Field	Description
Cancel Charge	Indicates the amount the customer will be charged if the event is cancelled.
Members/Non-Members	Used by private clubs to distinguish between guest types; can be renamed to suit your needs (e.g. “Adults,” “Children”).
PO Number	Identifies a purchase order associated with the event.
Folio Number	Identifies a folio number associated with the event.
Closed	Lets you track a closed date for the event; optionally allows you to lock users out of closed events.

Unit 2: Customizing the Sub-Event Window

Upon completing this unit, you will be able to:

- *Arrange and space fields on the Sub-Event screen.*
- *Stretch and shrink fields on the Sub-Event screen.*
- *Insert spacers, splitters, and separators onto the Sub-Event screen.*
- *Create new groups for fields and organize existing fields.*
- *Create new tabs.*
- *Modify and save your new screen layout.*

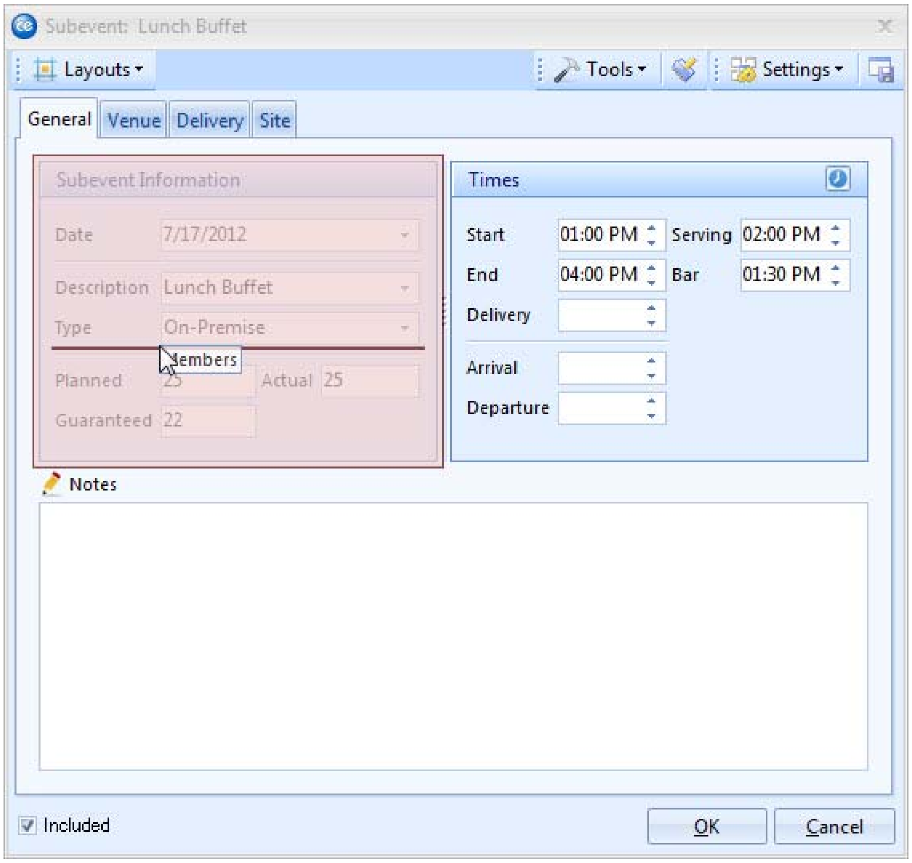
Arranging and Spacing Fields on the Screen

1. In Event Manager, click the **Sub-Event** button, next to the **Event** button on the left-hand side of the screen.
   Result: *The Event Manager switches to the Sub-Event Display.*

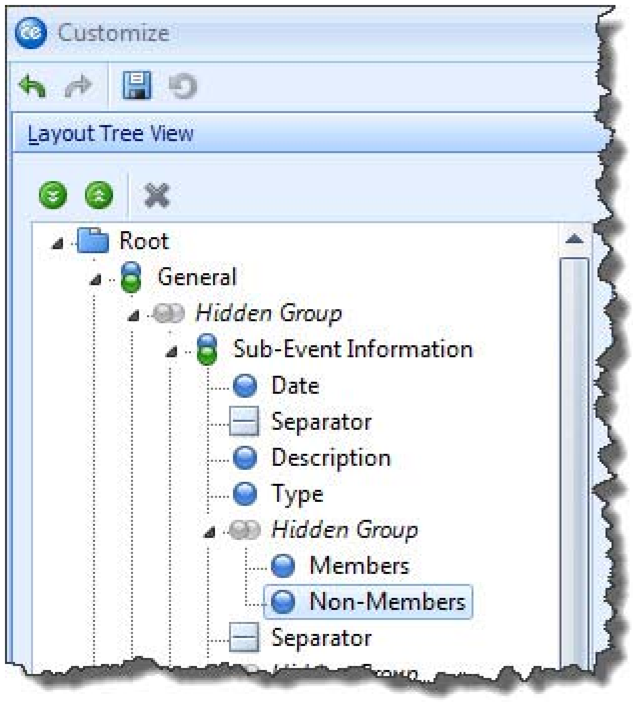
2. Click the **View/Edit Current Sub-Event** button,  located on the right of the Sub-Event pane.
   Result: *The Sub-Event window opens.*
   Note: *As an option, you can double-click on the field captions in the Sub-Event pane of Event Manager.*
3. Right-click anywhere on the Sub-Event window.
   Note: *Do not right-click within fields or text boxes, but rather on areas of the screen that do not allow data-entry.*
4. Choose **Customize**.
   Result: *The Customize window appears.*
   Note: *The left pane of this window, Layout Tree View, lists fields and other screen elements already displayed on the Sub-Event window; the right pane, Available Items, lists other objects that can be placed on the screen.*
5. Hold your left mouse button down on the <u>Members </u>field in the Available Items pane on the right-hand side of the Customize window.
   Note: *You may have previously renamed this field to Adults or some other variation within Global Settings.*
6. Drag this field onto the Sub-Event window, but **<u>do not drop it yet</u>**.
   Important Note: *Because objects on the screen exist in groups, it is important to **carefully note** where you are dropping things you drag in. As you move this <u>Members</u> field over the screen, note that you can place it above certain fields, below them, to either side of them - as well as even using this new field to create a whole new tab in addition to the four existing tabs.*

7. Carefully drop the Members field below the Type field.

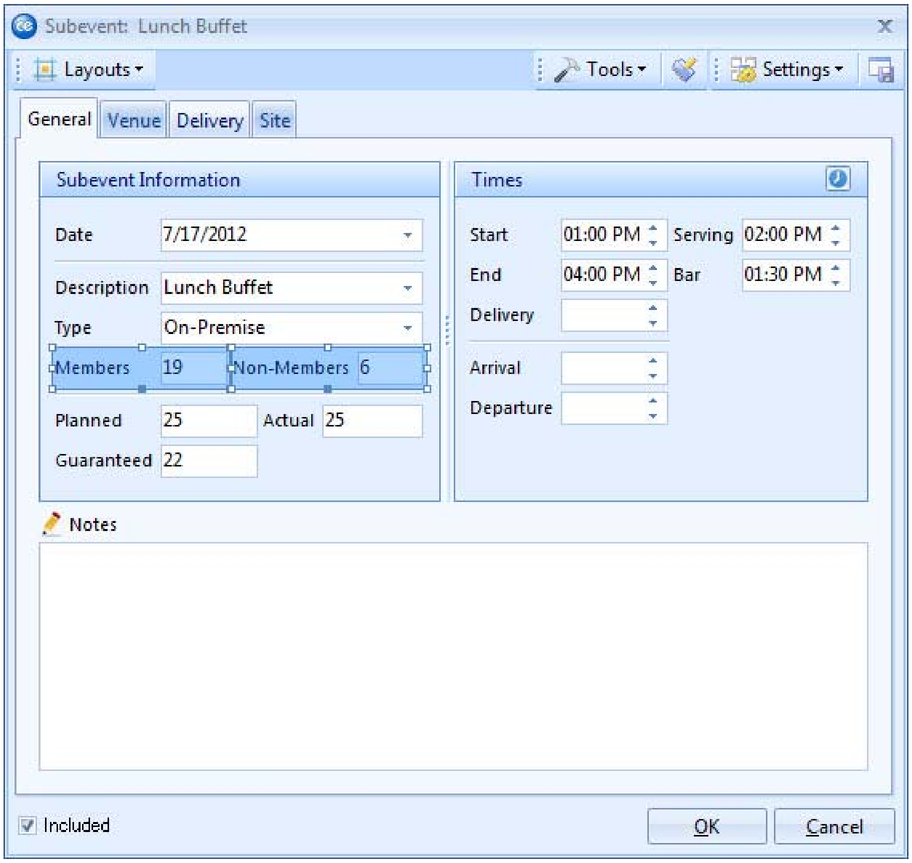
   Note: *If you make a mistake, click the* ***Undo*** *button , at the top left of the Customize window, and try again.*



8. Hold your left mouse button down on the Non-Members field, also in the right-hand pane of the Customize window.
9. Drag this field and drop it to the right of your new Members field.
   Result: *Both fields appear, but they have stretched the left side of the Sub-Event window.*
   Important Note: *Please note in the Layout Tree View pane (left-hand side of the Customize window), that a Hidden Group has been automatically created to house these two fields. Because fields are displayed vertically on the screen by default, when you deliberately make them horizontal a new hidden group must be created. (These groups will be automatically deleted if you remove horizontal fields.) (See image on following page.)*

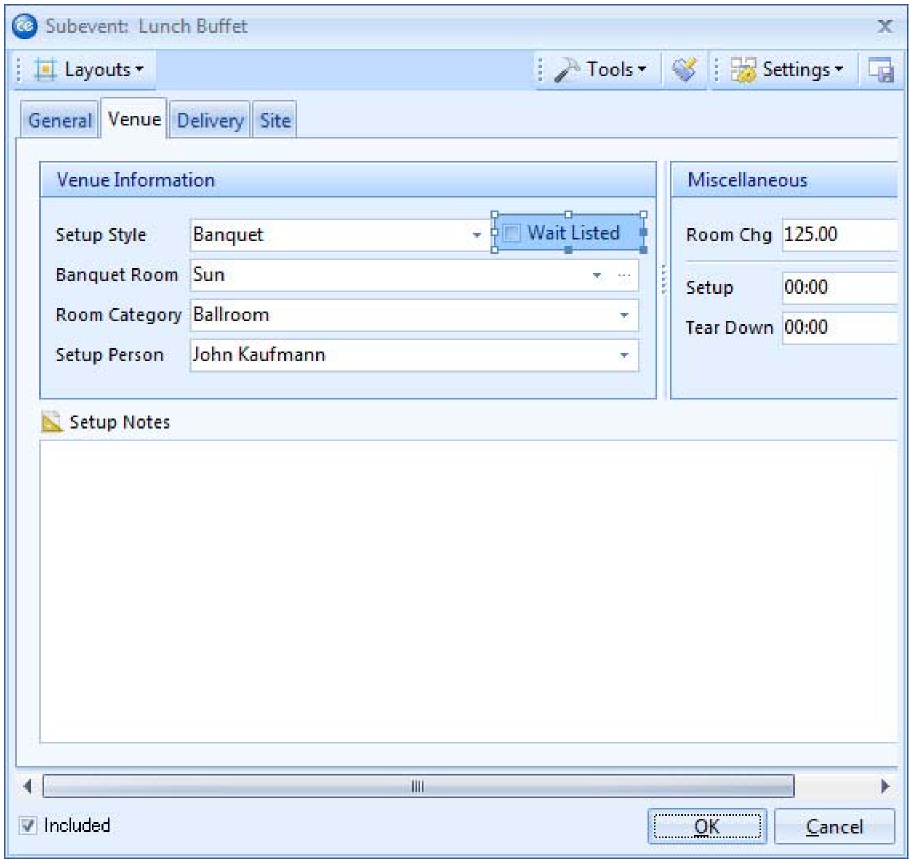


10. Click the **caption** (name) of the Members field, hold the **[Ctrl]** key down on your keyboard, and click the **caption** of the Non-Members field to select both simultaneously.
11. Right-click over the fields and choose **Horizontal Alignment > Client** to spread the fields out evenly on the screen and reduce the left side to its original width.
    Note: *You are also welcome to stretch and shrink the height and width of the Sub-Event window. (See image on following page.)*
12. When finished, click **Close** on the Customize window.

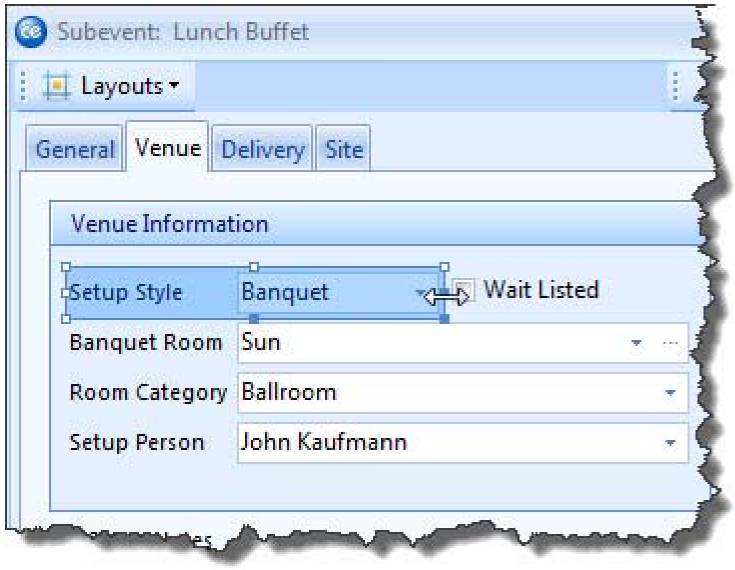


Stretching and Shrinking Fields

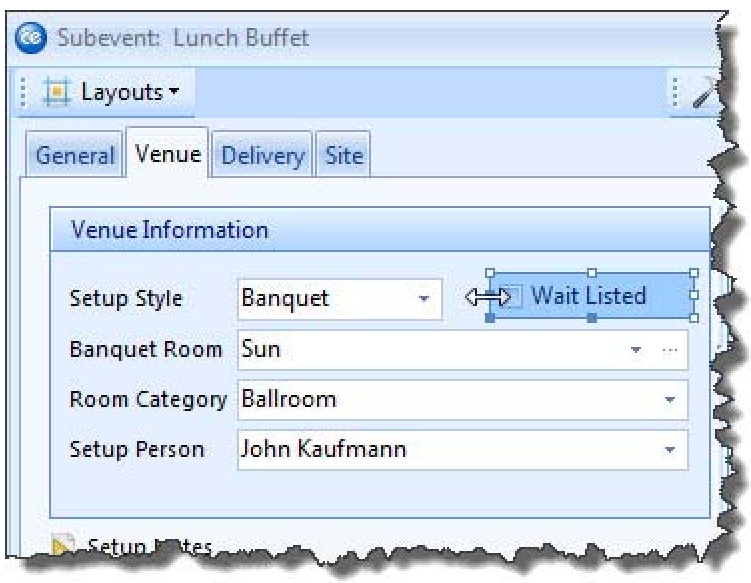
1. If the Customize window is not open, right-click anywhere on the Sub-Event window and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Venue** tab on the Sub-Event window.
   Result: *That tab and its contents are displayed.*
3. On the right-hand side of the Customize window, hold your left mouse button down on the <u>Wait Listed</u> field.
   Important Note: *There is also a **group heading** called Wait Listed. Be careful to grab only the field.*
4. Drag the field onto your screen and drop it to the right of the <u>Setup Style</u> field.
   Result: *The field is dropped in place, but it stretches the left side of the window.*
   Note: *Remember to pay careful attention to where you drop the field. If you make a mistake, click the **Undo** button*  *, at the top left of the Customize window, and try again.(See image on following page.)*



5. Right-click the Setup Style field on the screen and choose **Horizontal Alignment > Left**.
   Result: *The field is now aligned with the left edge of its group, and can now be stretched or shrunk by dragging the frame that surrounds it.*
6. Grab the right-side edge of the frame surrounding the Setup Style field and drag to the left to shrink the width of the field to roughly half of its current width.
   Result: *The field shrinks, and the field beside it moves left as well.*



7. Right-click the Wait Listed field on the screen and choose **Horizontal Alignment > Right**.
   Result: *The field moves to the right edge of the group.*
8. **[Optional]** Grab the left edge of the frame surrounding the Wait Listed field and drag to the left to stretch it as desired.
9. When finished, click **Close** on the Customize window.

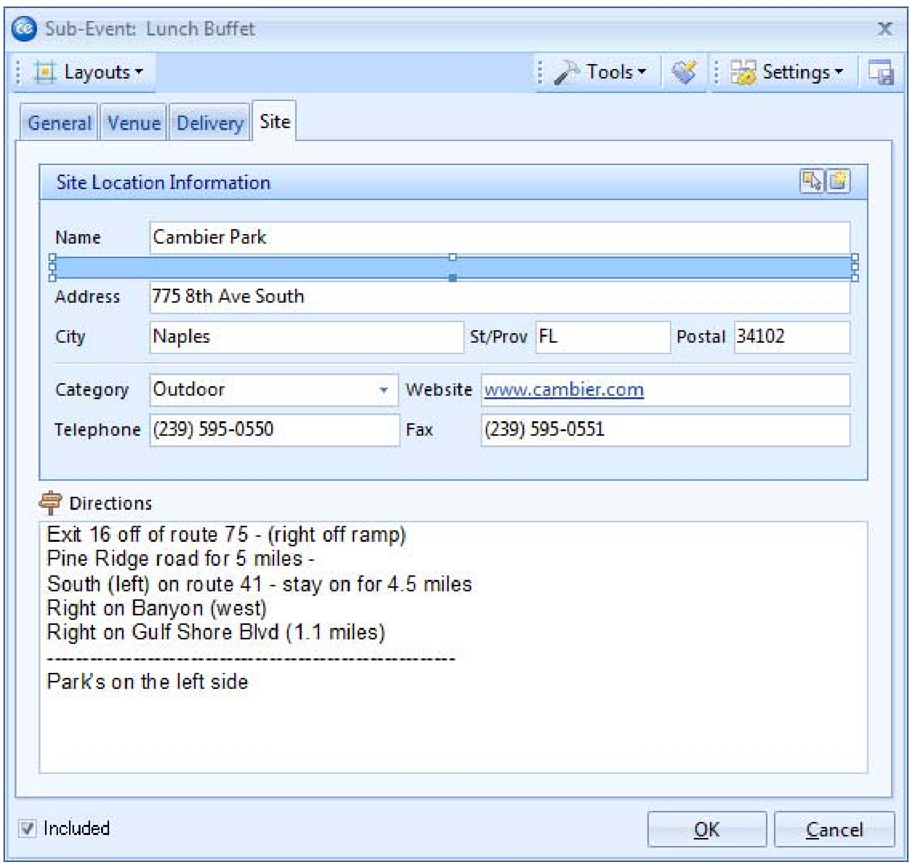


Inserting Spacers, Splitters, and Separators

1. If the Customize window is not open, right-click anywhere on the Sub-Event window and choose **Customize**.

Result: *The Customize window opens.*
Note: *Remember, do not right-click within fields or text boxes.*

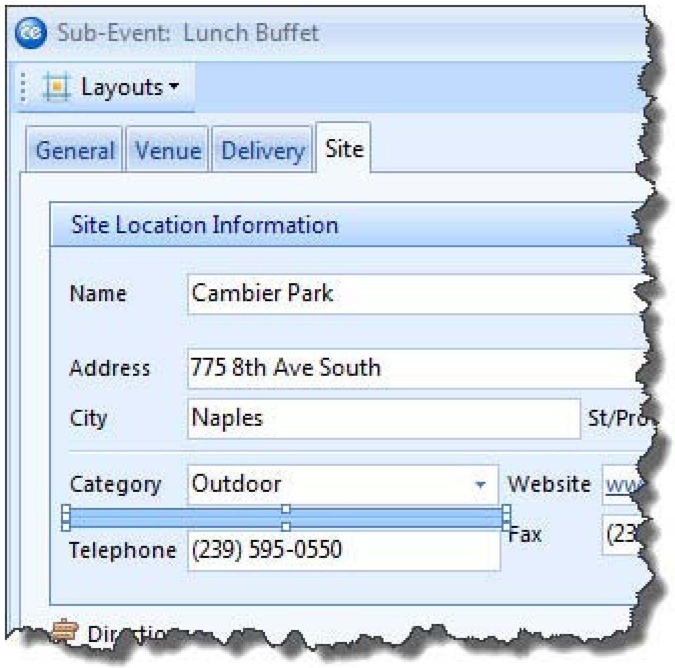
2. Click the **Site** tab on the Sub-Event window.
Result: *That tab and its contents are displayed.*
3. On the top right of the Customize window, click the **Add Auxiliary Item** button .
4. Choose **Add Empty Space Item**.
Result: *A new Empty Space Item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
5. Hold your left mouse button down on the new item and drag it and drop it below the Name field on the **Site** tab on the Sub-Event window.
Result: *The item adds blank space below the field, and can be stretched and shrunk to increase or decrease the space.*
Note: *Remember to pay careful attention to where you drop the item. If you make a mistake, click the **Undo** button*  *at the top left of the Customize window and try again.*



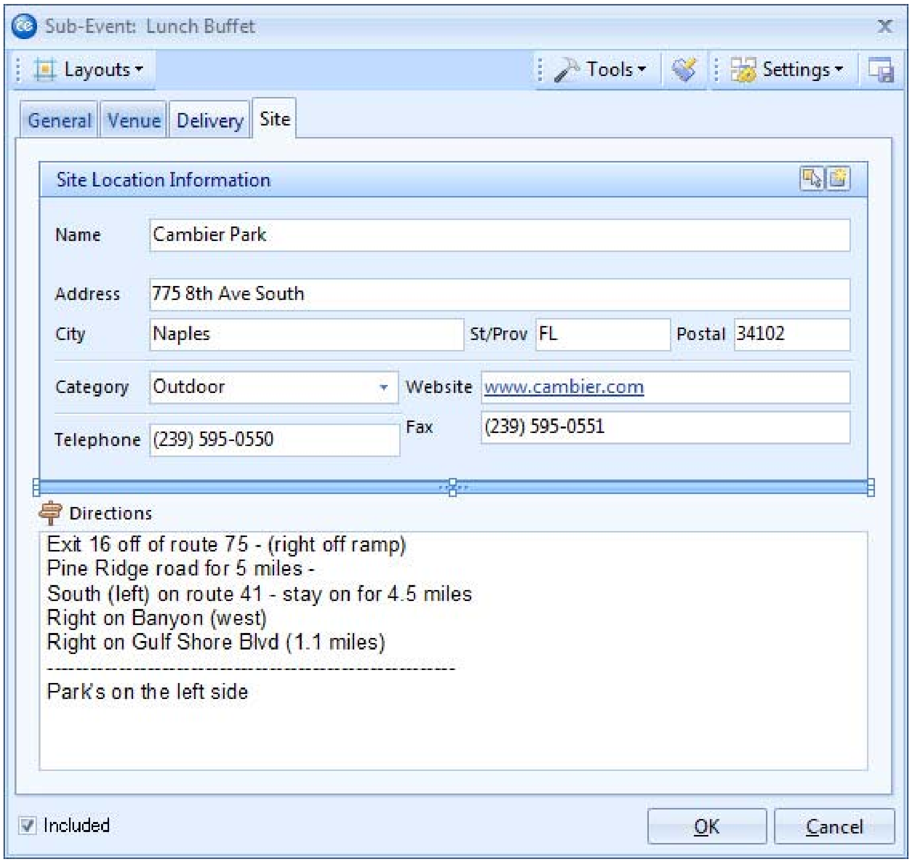
6. Click the **Add Auxiliary Item** button  again (as in Step 3) and choose **Add Separator Item**.

Result: *A new Separator item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*

7. Hold your left mouse button down on the new item and drag it and **carefully** drop it below the Category field on the **Site** tab.
   Result: *The item adds a separator line below the field.*
   Note: *Notice as you drag that the size of the separator line adjusts automatically depending on the width of the fields it is separating, and even automatically becomes a vertical line if placed beside a field rather than above or below it.*



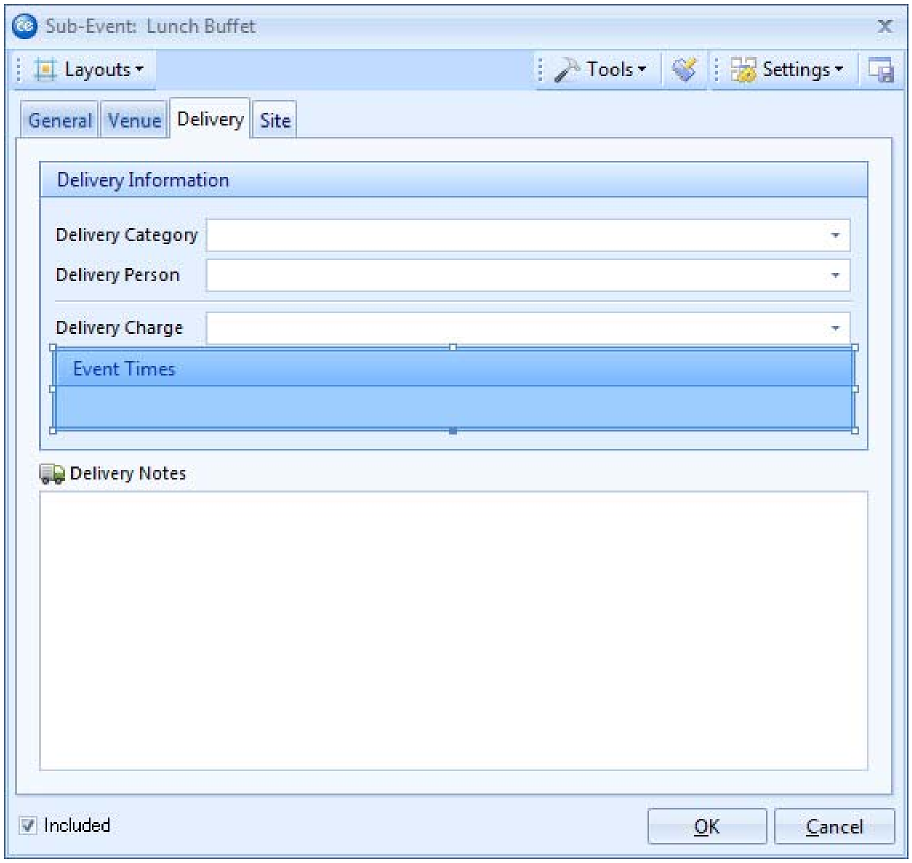
8. Click the **Add Auxiliary Item** button  again and choose **Add Splitter Item**.
   Result: *A new Splitter item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
9. Hold your left mouse button down on the new item and drag it and **carefully** drop it above the caption Directions on the screen.
   Result: *The item adds a splitter line above the text box.*
   Note: *Splitter lines are often used to separate entire groups of fields, and can be placed horizontally or vertically on the screen.*
10. When finished, click **Close** on the Customize window. (See image on following page.)



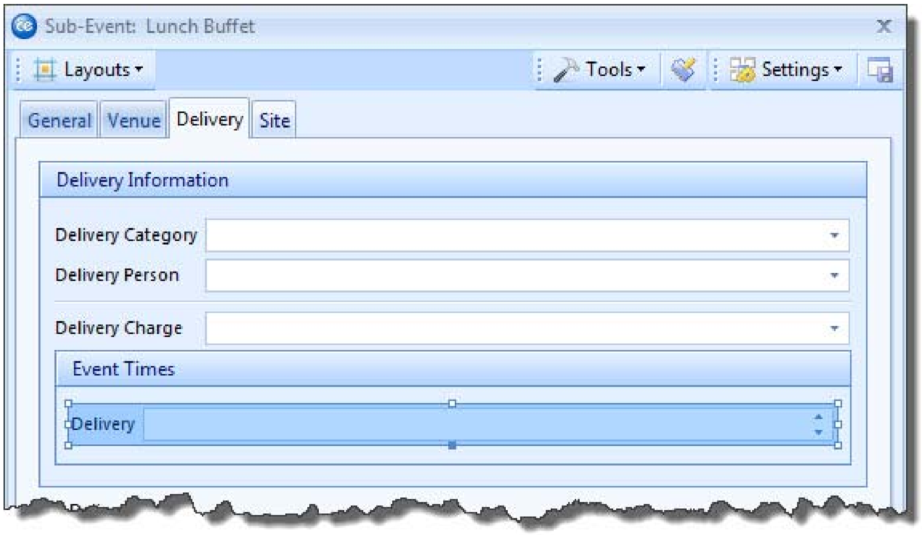
Creating New Groups for Fields

1. If the Customize window is not open, right-click anywhere on the Sub-Event window and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. On the **General** tab of the Sub-Event window, hold your left mouse button down on the Delivery time field and drag it and drop it into the Available Items pane (right-hand side) of the Customize window.
   Result: *The field is removed from the screen.*
3. Repeat Step 2 to remove the Serving time from the screen, as well.
4. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
5. Click the new item to edit its name, type Event Times and press **[Enter]**.
   Note: *If necessary, you can press your **[F2]** key to rename the item.*
6. Click the **Delivery** tab on your Sub-Event window.
   Result: *That tab and its contents are displayed.*
7. Drag the new group item from the Customize window to your Sub-Event window and place it below the Delivery Charge field.
   Note: *Remember to pay careful attention to where you drop the field. If you*

*make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*

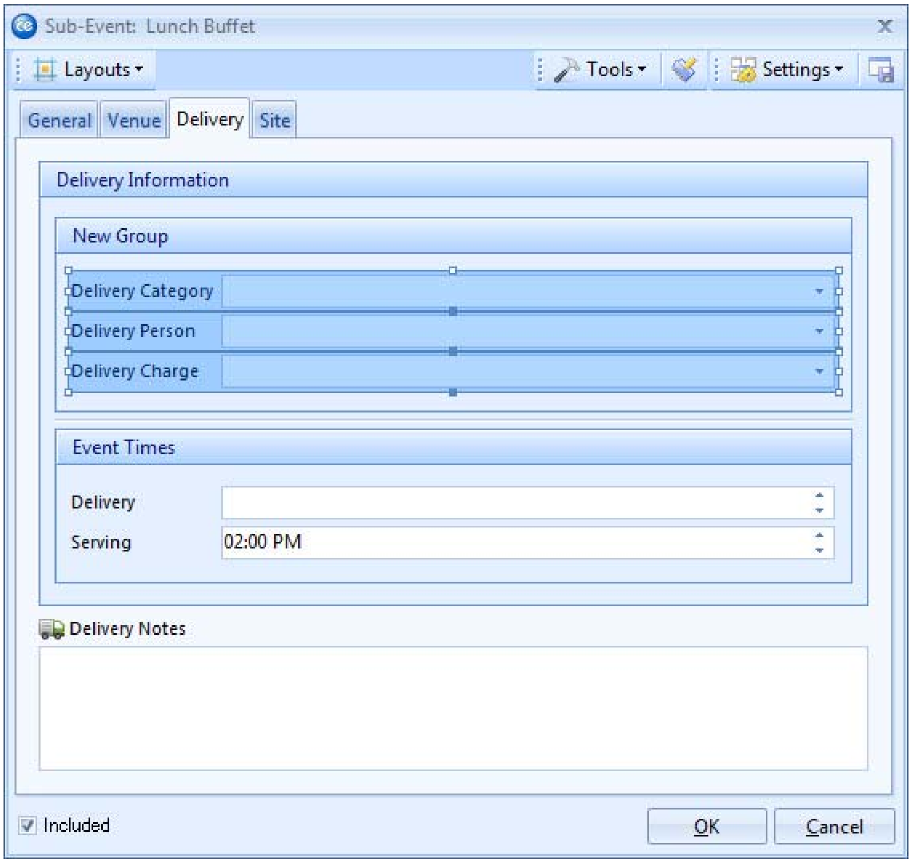


8. In the Available Items pane of the Customize window, hold your left mouse button down on the <u>Delivery</u> field.
9. Drag the <u>Delivery</u> field onto the screen and drop it inside your new Event Times group, being careful to place it **<u>within</u>** the group as shown on the following page.
10. Repeat Steps 8 and 9 to place the <u>Serving</u> field within the Event Times group, as well.
11. When finished, click **Close** on the Customize window. (See image on following page.)

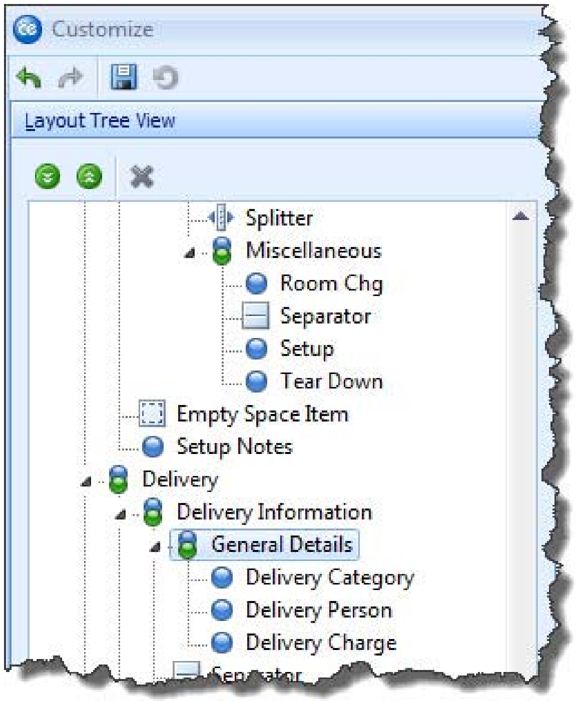


Organizing Existing Fields Into Groups

1. If the Customize window is not open, right-click anywhere on the Sub-Event window and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Delivery** tab on the Sub-Event window.
   Result: *That tab and its contents are displayed.*
3. Click the Delivery Category field to select it.
4. Hold your **[Shift]** key down and select the Delivery Person and Delivery Charge fields.
5. Right-click the fields and choose **Group**.
   Result: *The selected fields are placed in a group with the default title New Group. (See image on following page.)*



6. Click the name New Group in the Layout Tree View pane of the Customize window.
7. Click the name again, or press the **[F2]** key on your keyboard to rename.
8. Type the name General Details and press your **[Enter]** key.
   Result: *The new group heading is updated on the screen with your new name.*
9. When finished, click **Close** on the Customize window. (See image on following page.)

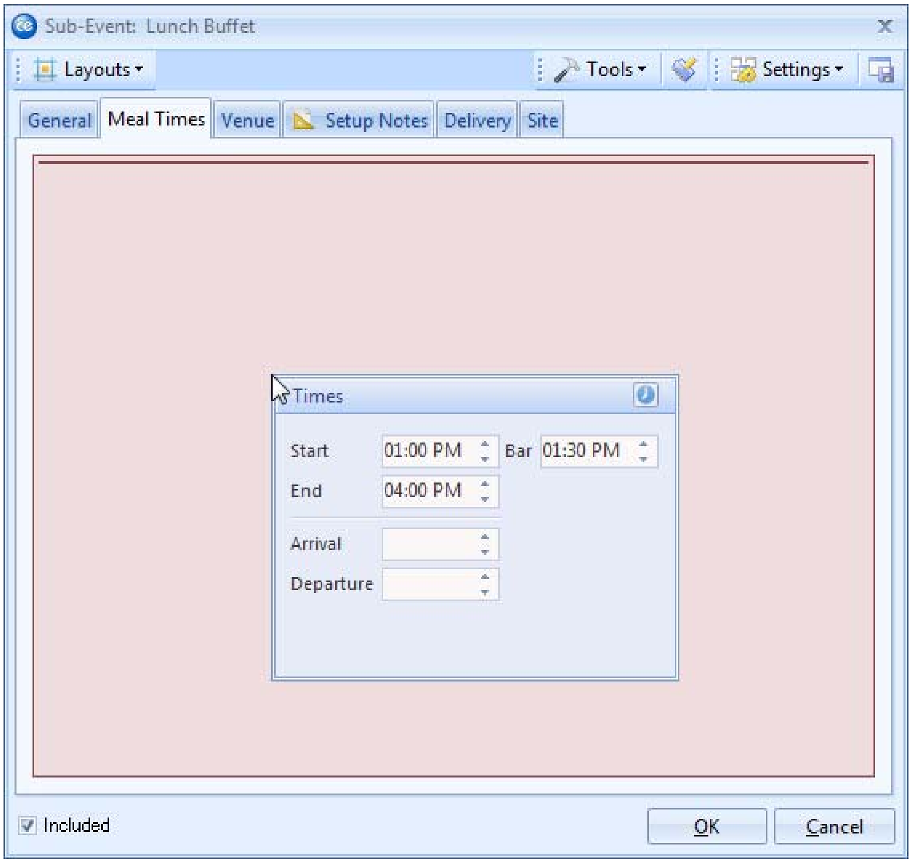


Creating New Tabs

1. If the Customize window is not open, right-click anywhere on the Sub-Event window and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Venue** tab on the Sub-Event window.
   Result: *That tab and its contents are displayed.*
3. Hold your left mouse button down on the Setup Notes text box at the bottom of the **Venue** tab and drag and drop it to the right of the **Venue** tab, making it an additional tab between **Venue** and **Delivery**.
   Note: *Remember to pay careful attention to where you drop the text box (see image below). If you make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*

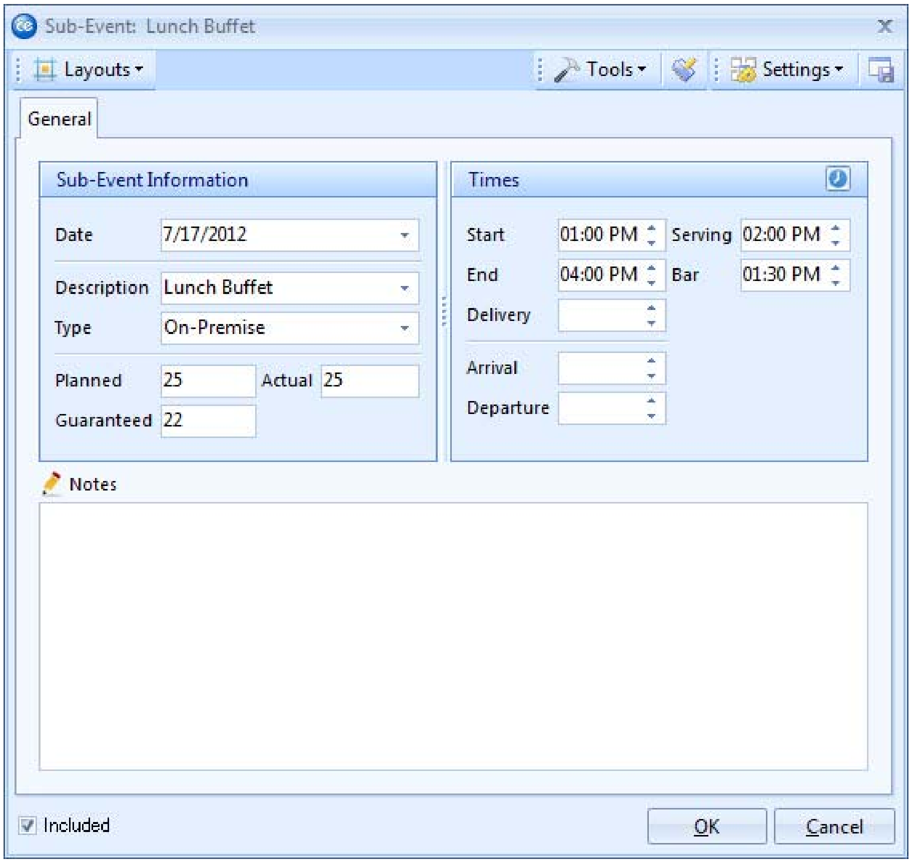
4. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
5. Click the new item to edit its name, type Meal Times, and press **[Enter]**.
   Note: *If necessary, you can press your* ***[F2]*** *key to rename the item.*
6. Drag the new group item onto your Sub-Event screen, carefully placing it between the **Genera**l tab and the **Venue** tab.

7. Click the **General** tab on the Sub-Event window.
   Result: *That tab and its contents are displayed.*
8. Hold your left mouse button down on the group heading Times (on the **General** tab) and drag it (WITHOUT DROPPING IT) on top of your new Meal Times tab.
   Result: *The Meal Times tab is displayed.*
9. Drag the Times group and drop it (and its corresponding fields) inside your new Meal Times tab, being careful to place it **within** the tab as shown on the following page.
10. When finished, click **Close** on the Customize window. (See image on following page.)

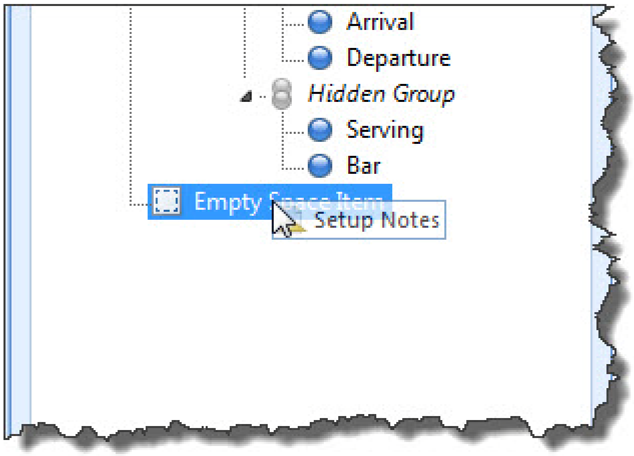


Changing Screen Layout

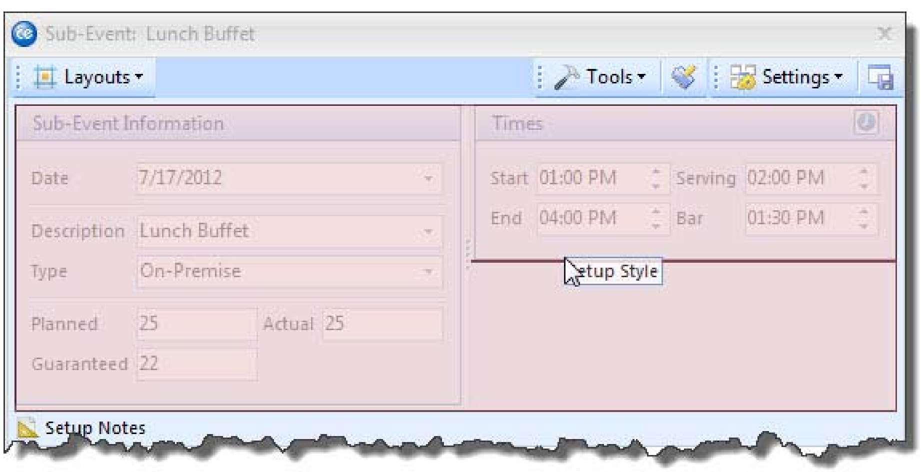
1. Open Sub-Event window in Event Manager in its default layout.
   Note: *If you have changed the default layout using earlier topics in this tutorial, you can close the Sub-Event window without saving your window settings and reopen it. You can also continue here with a layout other than the default; however, images in this topic may look different than your screen.*
2. Right-click anywhere on the Sub-Event window.
   Note: *Do not right-click within fields or text boxes, but rather on areas of the screen that do not allow data-entry.*
3. Hold your left mouse button down on the **Site** tab on the screen, and drag and drop that tab into the Available Items pane of the Customize window.
   Result: *That tab is removed from the Sub-Event window.*
4. Repeat Step 4 to remove the **Delivery** and **Venue** tabs as well - leaving only the **General** tab remaining.



5. In the Layout Tree View pane of the customize window, take note of the current position of the Notes text block - located at the very bottom of the list of fields. (You will be removing and replacing this item in the following steps.)
6. In the Layout Tree View pane, hold your left mouse button down on the **Notes** text block and drag and drop it into the Available Items pane of the Customize window.
   Result: *The text box is removed from the screen.*
7. Locate the **Setup Notes** text box in the Available Items pane of the Customize window, and drag it and drop it on top of the last item in the Layout Tree View pane (the empty space item).
   Result: *The Setup Notes text box appears at the bottom of your Sub-Event window.*
   Note: *You will only be able to drop the Setup Notes item if your mouse cursor is on top of the last item in the list, as shown on the following page. You can also drag and drop it into position on the Sub-Event window, but you must be careful not to inadvertently place it within one of the groups of fields.*



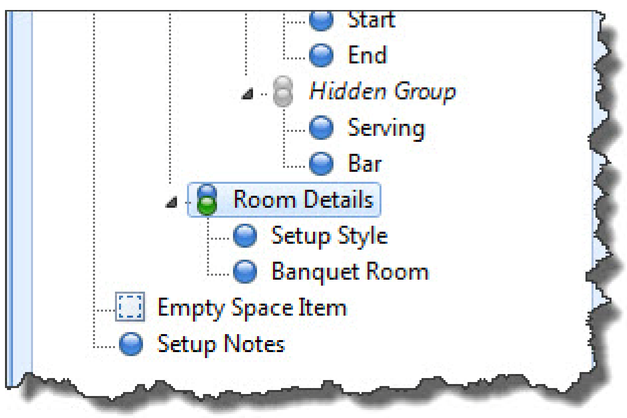
8. In the Layout Tree View pane, right-click the **Root** group and choose **Layout Direction** > **Vertical.**
   Result: *The* ***General*** *group is no longer a tab on your Sub-Event screen, but rather a group of fields listed vertically.*
9. In the Layout Tree View pane, right-click the **General** group heading and choose **Ungroup**.
   Result: *The group heading* ***General*** *is removed, and the fields remain displayed on your Sub-Event window.*
10. Hold your left mouse button down on the Delivery time field and drag it and drop it into the Available Items pane of the Customize window.
   Result: *The field is removed from your screen.*
11. Repeat Step 10 to remove the Separator item (small line) above Arrival time, and remove the Arrival and Departure times, as well.
12. Right-click the group heading **Times** and choose **Vertical Alignment** > **Top.**
   Result: *The height of the group is adjusted to encompass only the time fields.*
13. Locate the Setup Style field in the Available Items pane of the customize window, and drag it and drop it carefully below the Time group, as shown below.



14. Repeat Step 13 to drag and drop the Banquet Room field beneath the Setup Style field.
15. In the Sub-Event window, click the Setup Style field to select it.
16. Hold your **[Ctrl]** key down and select the Banquet Room field to select both fields simultaneously.

Tip: *For off-premise events, you will likely want to remove the banquet room details and replace them with site information. You can resize the window to fit additional information or choose to display information on additional tabs.*

17. Right-click over the selected fields and choose **Group**.
    Result: *The selected fields are placed in a group with the default title New Group.*
18. Click the name New Group in the Layout Tree View pane of the customize window.
19. Click the name again, or press the **[F2]** key on your keyboard to rename.
20. Type the name Room Details and press your **[Enter]** key.
    Result: *The new group heading is updated on the screen with your new name.*

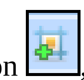


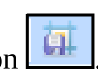
21. When finished, click **Close** on the Customize window.

Saving Custom Layouts

1. Customize the Sub-Event window based on the topics above.
2. Click the **Layouts** button at the top left of the Sub-Event window and choose **Custom**.
   Result: *The Custom Layouts window appears.(See image on following page.)*

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: *Local 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 the layout name and choosing **Copy From Current**.*

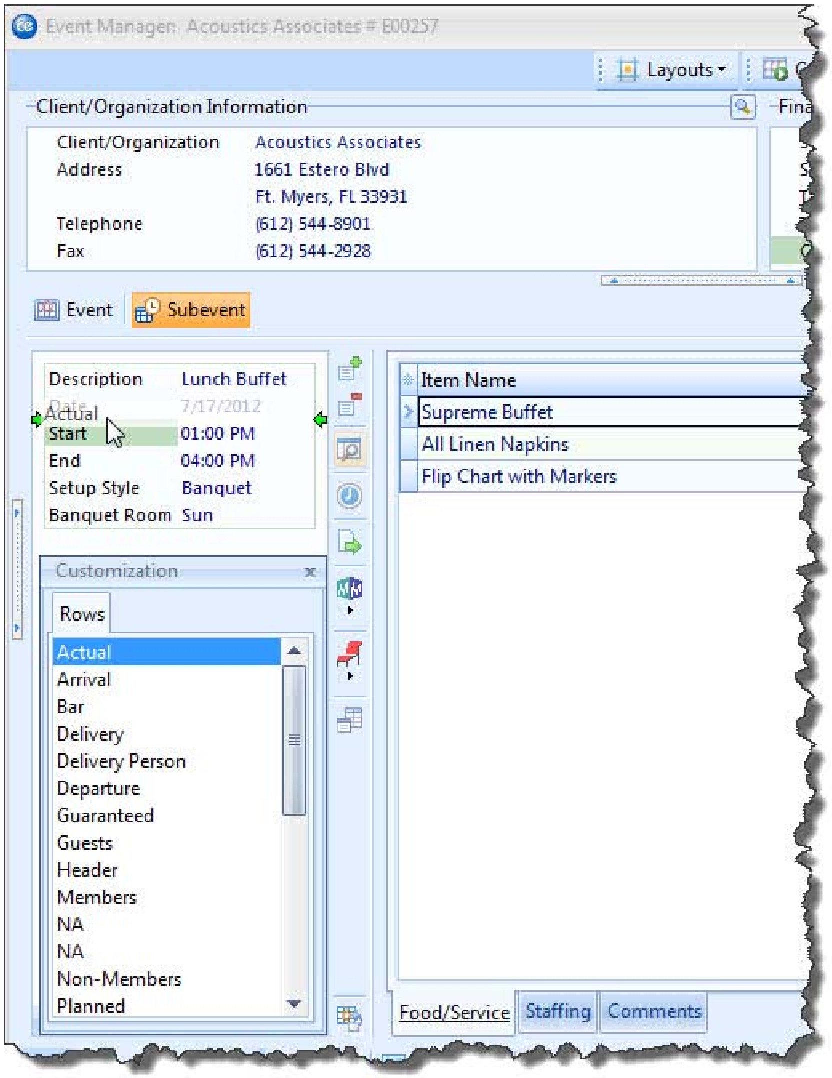
5. Type a name for new layout and click the **Save Current Layout** button .
6. Click the X, at the top right of the Custom Layout window, to close it.

Choosing Fields on the Sub-Event Display

1. On the left-hand side of the Sub-Event display in Event Manager, click your right mouse button over the captions of the fields.
   Result: *A popup menu appears.*
2. Click **Field Chooser**.
   Result: *The Customization window appears, listing all fields available for dis-*

play on this screen.
Note: *Fields in this window are listed alphabetically.*

3. In the Customization window, hold your left mouse button down on the Actual field, and drag it and drop it onto the Sub-Event display beneath Description.
Result: *The field is added to your display.*



4. On the Sub-Event display, hold your left mouse button down on the Setup Style field and drag it and drop it in the Customization window.
Result: *That field is removed from the display.*
5. When finished, click the X at the top right of the window.

Table 2.1: Sub-Event Fields

Field	Description
Date	Indicates the date of the sub-event; defaults to the Event Date, but can be unique.
Description	Describes the sub-event; often used for meal names (“Breakfast Buffet,” “Lunch Served”), also for more general descriptions such as “Meeting.”
Type	Offers a means of categorizing or tracking the sub-event.
Start	Indicates the time the sub-event will begin.
Serving	Indicates the time the meal for the sub-event is scheduled to be served; can be renamed.
Delivery	Indicates the time all deliverable menu items are to be delivered for the sub-event.
Arrival	Indicates the time the guests for the sub-event are scheduled to arrive.
Bar	Indicates the time the bar will open for the sub-event.
End	Indicates the time the sub-event will end.
Planned	Indicates the time all deliverable menu items are to be delivered for the sub-event.
Actual	Indicates the time the meal for the sub-event is scheduled to be served; can be renamed.
Planned	Indicates the number of guests the customer is planning for an event.
Actual	Indicates the actual number of guests who attended (or will be attending) the event.
Guaranteed	Indicates the minimum number of guests the customer is guaranteeing for the event; can be an automatic percentage of the Planned guest count.
General Notes	Large text block at the bottom of the tab to enter any general notes pertinent to the sub-event; on-screen reference that does not print anywhere.
Delivery	Large text block at the bottom of the tab to enter any general notes pertinent to the sub-event; on-screen reference that doesn’t print anywhere
Setup Style	Indicates how the venue for the sub-event will be set up.
Room	Identifies the banquet room for the sub-event.
Room Charge	Allows you to enter a charge associated with the banquet room.
Wait List	Lets you put the client on a wait list if their preferred room is not available.

Table 2.1: Sub-Event Fields

Field	Description
Wait Listed	Identifies the date the sub-event was wait listed, so you can prioritize availability; date is entered automatically by the program.
Setup/Tear Down	Indicates the amount of hours and/or minutes required to set up or clean the room for the sub-event, and displays the time room should be accessible or available; can be set to default.
Room Category	Allows you to categorize the banquet room for tracking purposes; examples might include “Ballroom,” “Meeting Room,” etc.
Setup Person	Allows you to identify a specific person responsible for setting up the banquet room.
Setup Notes	Large text block at the bottom of the tab to enter any setup notes pertinent to the sub-event; can optionally be included in your various event prints.
Name	Indicates the name of the off-premise location.
Address	Indicates the address of the off-premise location.
City	Indicates the city where the off-premise site is located.
State/Province	Indicates the state or province of the location.
Postal	Indicates the site location’s postal or ZIP code.
Category	Allows you to categorize and track your various off-premise locations.
Website	Identifies the site location’s website address; can be used as a link to visit that website.
Telephone	Indicates the site location’s phone number.
Fax	Indicates the site location’s fax number.
Directions	Large text block at the bottom of the tab to enter detailed driving directions to the location; can be optionally printed on your various event prints.
User Defined Fields	Allows you to create any additional fields you want, to suit the specific needs of your company.
Delivery Person	Identifies the person responsible for making the delivery for the sub-event.
Category	Allows you to categorize and track various types of deliveries.
Delivery Charge	Allows you to enter a charge associated with the delivery.
Delivery Notes	Large text block at the bottom of the tab to enter any notes pertinent to the delivery; can be printed on your Event Deliveries print.

Unit 3: Customizing the Event Wizard Display

Upon completing this unit, you will be able to:

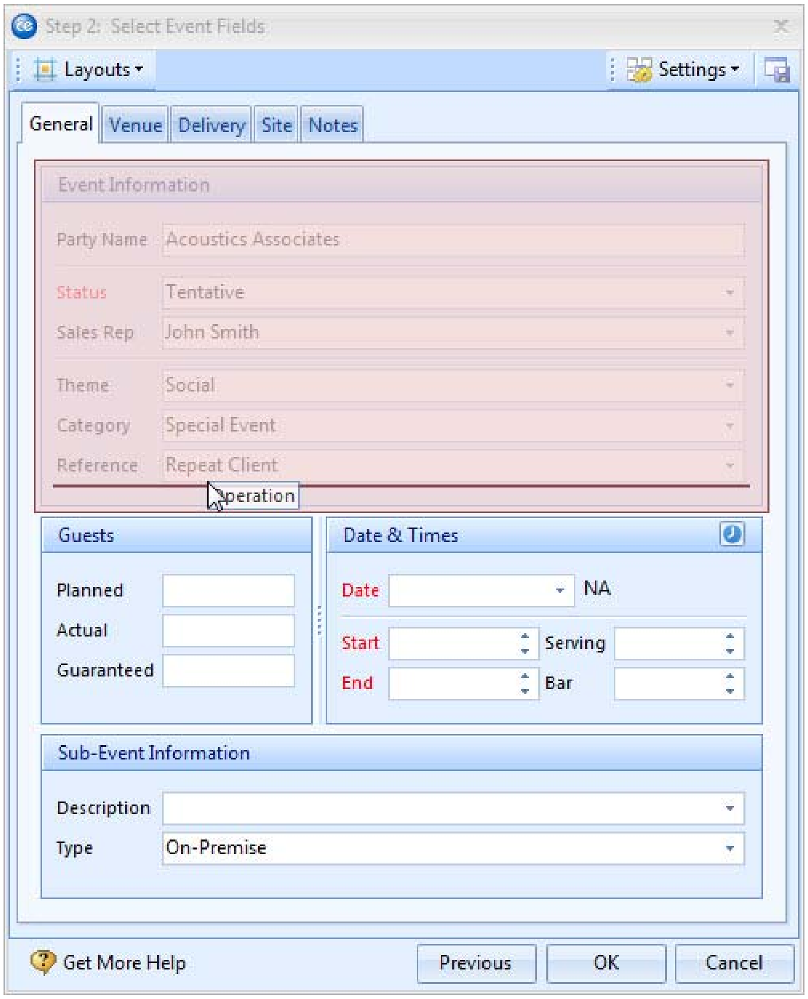
- *Arrange and space fields on the Event Wizard.*
- *Stretch and shrink fields on the Event Wizard.*
- *Insert spacers, splitters, and separators onto the Event Wizard.*
- *Create new groups for fields and organize existing fields.*
- *Create new tabs.*
- *Modify and save your new screen layout.*

Arranging and Spacing Fields on the Screen

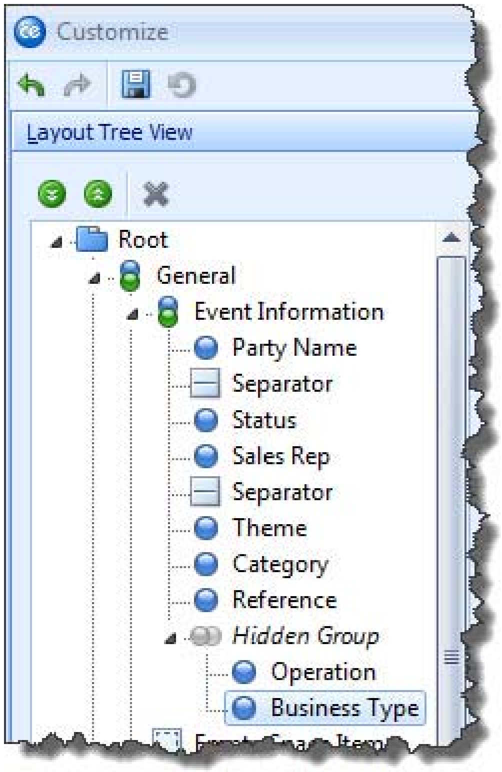
1. Click the **Tools** sidebar group and click the **Event Wizard** button.
   Result: *The Event Wizard opens on Step 1, the account selection window.*
   Note: *This topic assumes you are using the default layout of Event Wizard.*
2. Click the **Next** button at the bottom right of the Event Wizard.
   Result: *The Event Wizard moves to Step 2, and displays various event information.*
3. Right-click anywhere on the Event Wizard screen.
   Note: *Do not right-click within fields or text boxes, but rather on areas of the screen that do not allow data-entry.*
4. Choose **Customize**.
   Result: *The Customize window appears.*
   Note: *The left-hand pane of this window, Layout Tree View, lists fields and other screen elements already displayed on the Event Wizard screen; the right pane, Available Items, lists other objects that can be placed on the screen.*
5. Hold your left mouse button down on the <u>Operation</u> field in the Available Items pane on the right-hand side of the Customize window.
6. Drag this field onto the Event Wizard screen, but **<u>do not drop it yet</u>**.
   Important Note: *Because objects on the screen exist in groups, it is important to **<u>carefully note</u>** where you are dropping things you drag in. As you move this Operation field over the screen, note that you can place it above certain fields, below them, to either side of them - as well as even using this new field to create a whole new tab in addition to the five existing tabs.*

7. Carefully drop the Operation field below the Reference field.

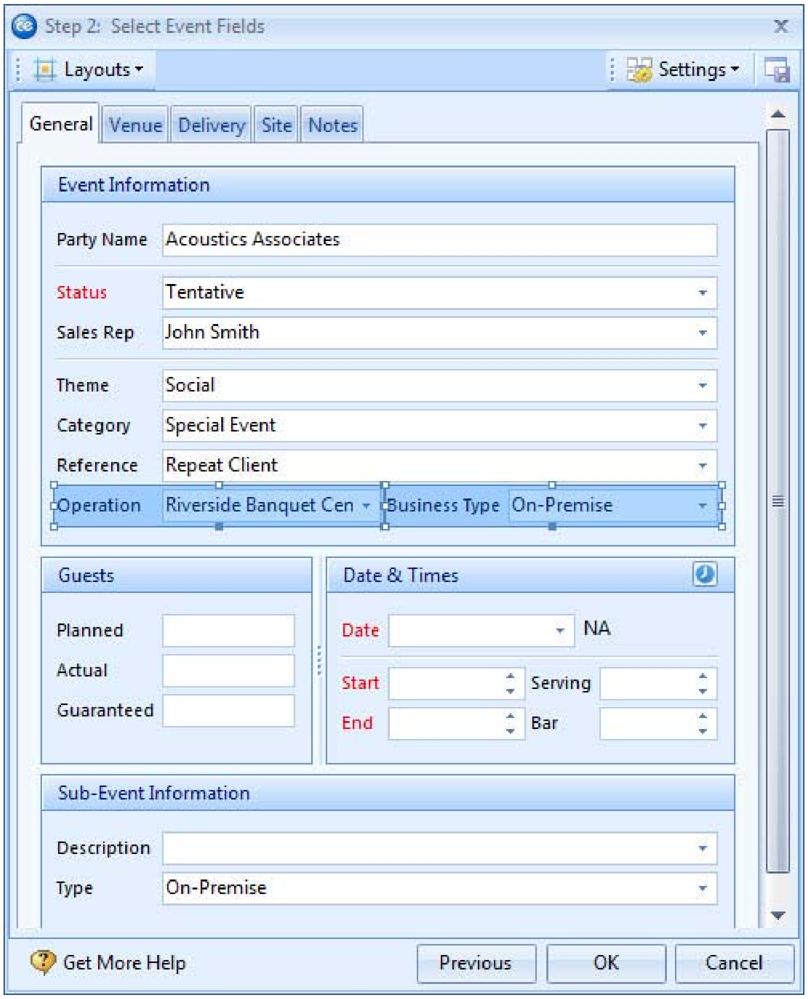
   Note: *If you make a mistake, click the* ***Undo*** *button* *, at the top left of the Customize window, and try again.*



8. Hold your left mouse button down on the Business Type field, also in the right-hand pane of the Customize window.
9. Drag this field and drop it to the right of your new Operation field.
   Result: *Both fields appear, but are not evenly spaced on the screen (Business Type is barely visible).*
   Important Note: *Please note in the Layout Tree View pane (left-hand side of the Customize window), that a Hidden Group has been automatically created to house these two fields. Because fields are displayed vertically on the screen, by default, when you deliberately make them horizontal a new hidden group must be created. (These groups will be automatically deleted if you remove horizontal fields.) (See image on following page.)*

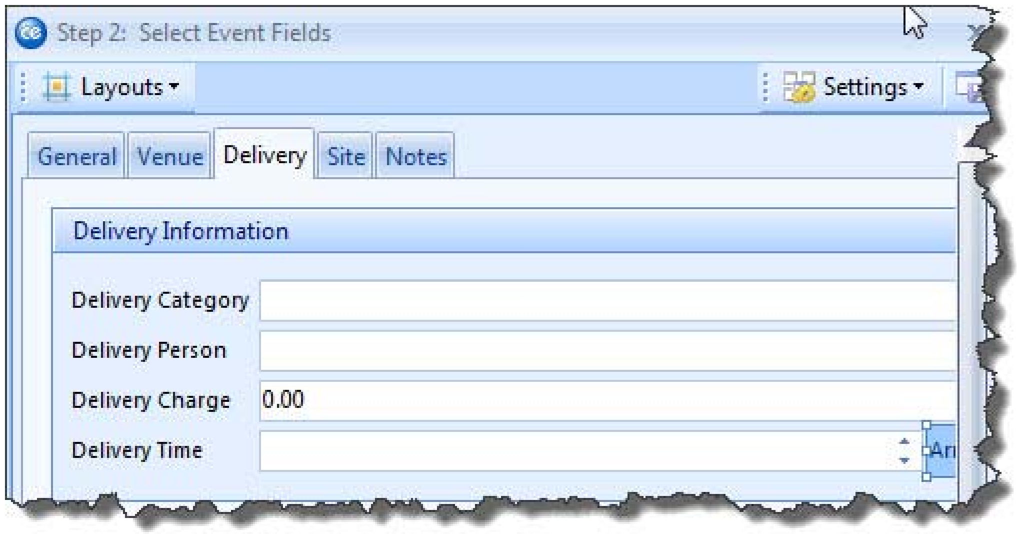


10. Click the **caption** (name) of the Operation field, hold the **[Ctrl]** key down on your keyboard, and click the **caption** of the Business Type field to select both simultaneously.
11. Right-click over the fields and choose **Horizontal Alignment > Client** to spread the fields out evenly on the screen.
    Note: *You are also welcome to stretch and shrink the height and width of the Wizard screen.*
12. When finished, click **Close** on the Customize window. (See image on following page.)

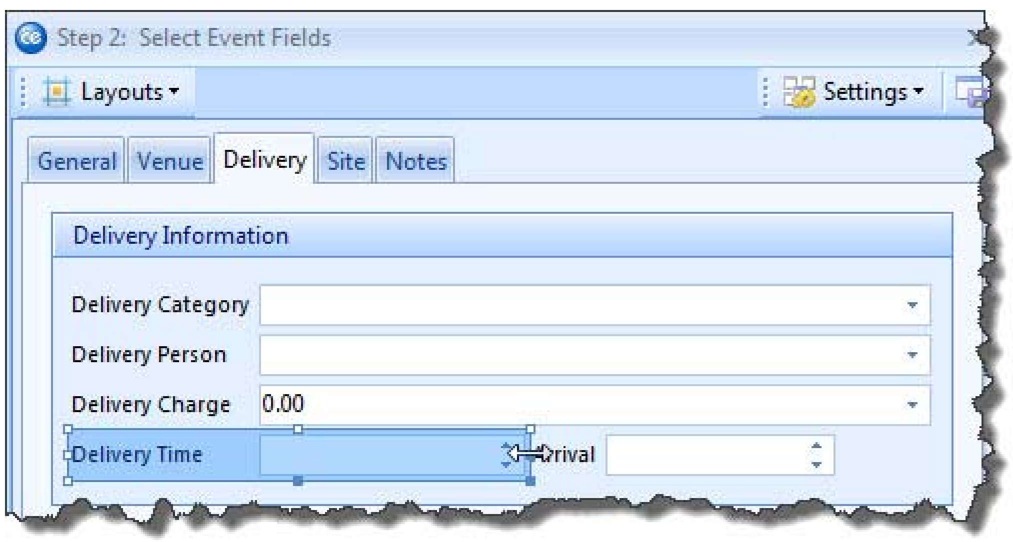


Stretching and Shrinking Fields

1. If the Customize window is not open, right-click anywhere on Step 2 of the Event Wizard screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Delivery** tab on the Event Wizard screen.
   Result: *That tab and its contents are displayed.*
3. On the right side of the Customize window, hold your left mouse button down on the Arrival field.
4. Drag the field onto your screen and drop it to the right of the Delivery Time field.
   Result: *The field is dropped in place, but does not fit horizontally on the tab.*
   Note: *Remember to pay careful attention to where you drop the field. If you make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*

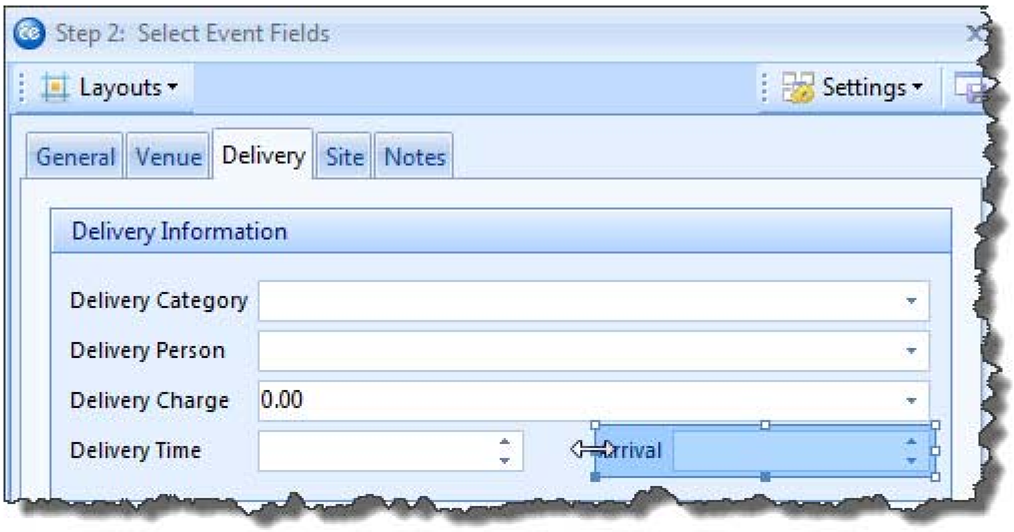


5. Right-click the Delivery Time field on the screen and choose **Horizontal Alignment > Left**.
   Result: *The field is now aligned with the left edge of its group (the left-hand side of the* **Delivery** *tab), and can now be stretched or shrunk by dragging the frame that surrounds it.*
6. Grab the right-side edge of the frame surrounding the Delivery Time field and drag to the left to shrink the width of the field to roughly half of its current width.
   Result: *The field shrinks, and the* Arrival *field beside it comes into view on the tab.*



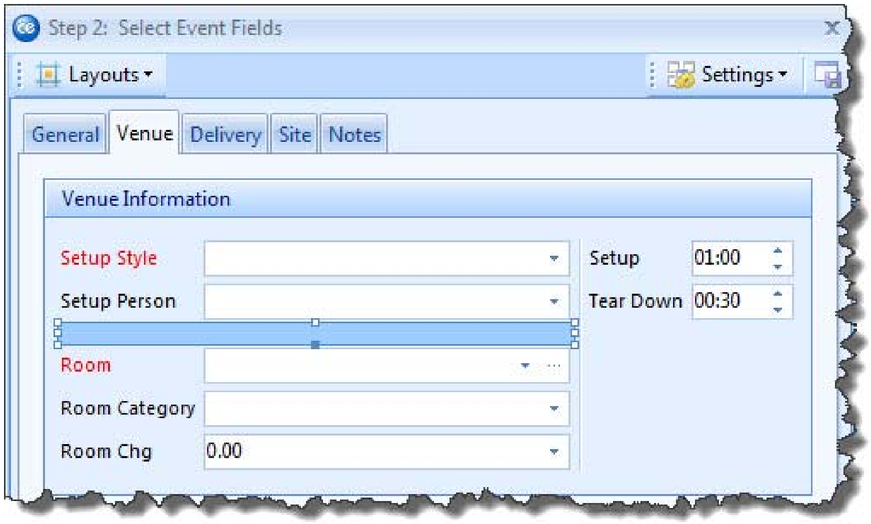
7. Right-click the Arrival field on the screen and choose **Horizontal Alignment > Right**.
   Result: *The* Arrival *field moves to the right edge of the* **Delivery** *tab.*

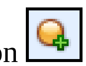
8. Grab the left edge of the frame surrounding the <u>Arrival</u> field and drag to the left to stretch it as desired.
9. When finished, click **Close** on the Customize window.

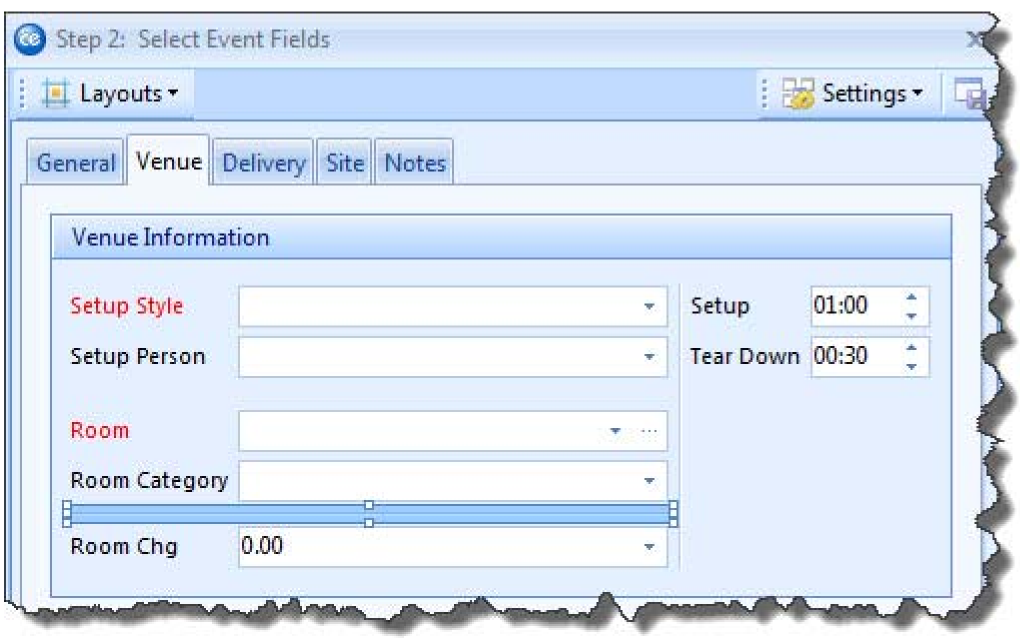


Inserting Spacers, Splitters, and Separators

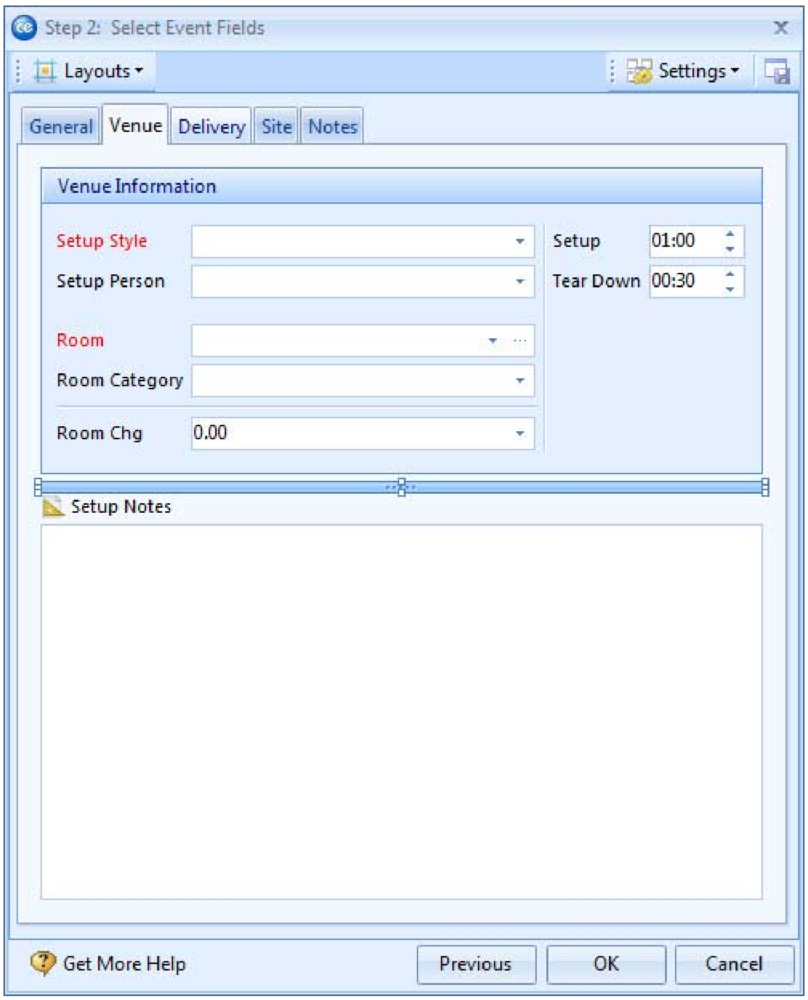
1. If the Customize window is not open, right-click anywhere on Step 2 of the Wizard screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Venue** tab on the Wizard screen.
   Result: *That tab and its contents are displayed.*
3. On the top right of the Customize window, click the **Add Auxiliary Item** button .
4. Choose **Add Empty Space Item**.
   Result: *A new Empty Space Item is added to the top of the Available Items pane on the right-hand side of the Customize window.*
5. Hold your left mouse button down on the new item and drag it and drop it below the <u>Setup Person</u> field on the left side of the **Venue** tab on the Event Wizard screen.
   Result: *The item adds blank space below the field, and can be stretched and shrunk to increase or decrease the space.*
   Note: *Remember to pay careful attention to where you drop the item. If you make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*



6. Click the **Add Auxiliary Item** button  again (as in Step 3) and choose **Add Separator Item**.
   Result: *A new Separator item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
7. Hold your left mouse button down on the new item and drag it and **<u>carefully</u>** drop it below the <u>Room Category</u> field on the **Venue** tab.
   Result: *The item adds a separator line below the field.*
   Note: *Notice as you drag that the size of the separator line adjusts automatically, depending on the width of the fields it is separating, and even automatically becomes a vertical line if placed beside a field rather than above or below it.*



8. Click the **Add Auxiliary Item** button  again and choose **Add Splitter Item**.
   Result: *A new Splitter item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
9. Hold your left mouse button down on the new item and drag it and **<u>carefully</u>** drop it above the caption Setup Notes on the screen.
   Result: *The item adds a splitter line above the text box.*
   Note: *Splitter lines are often used to separate entire groups of fields, and can be placed horizontally or vertically on the screen.*
10. When finished, click **Close** on the Customize window.



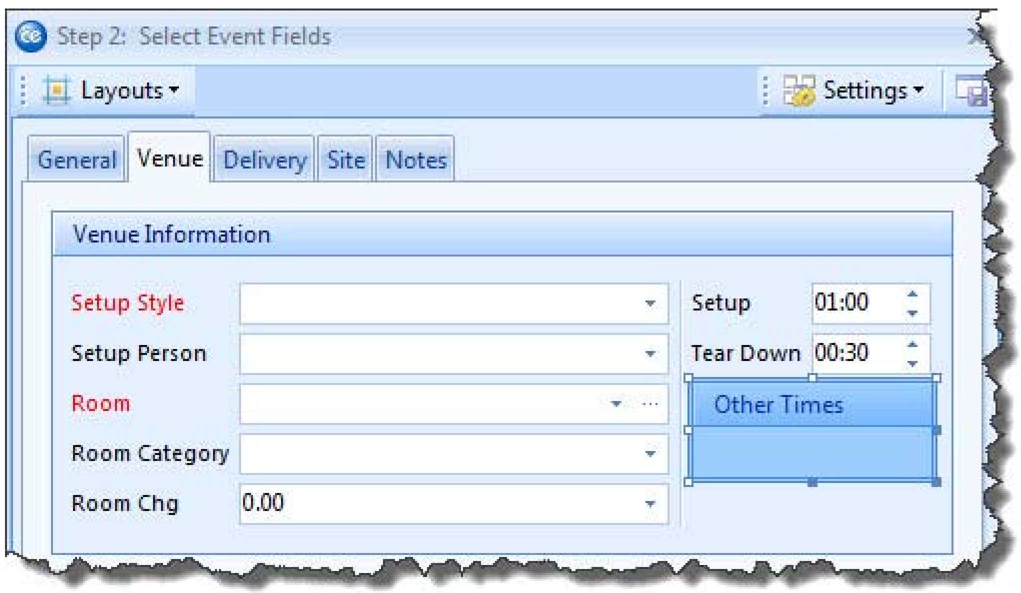
Creating New Groups for Fields

1. If the Customize window is not open, right-click anywhere on Step 2 of the Event Wizard screen and choose **Customize**.

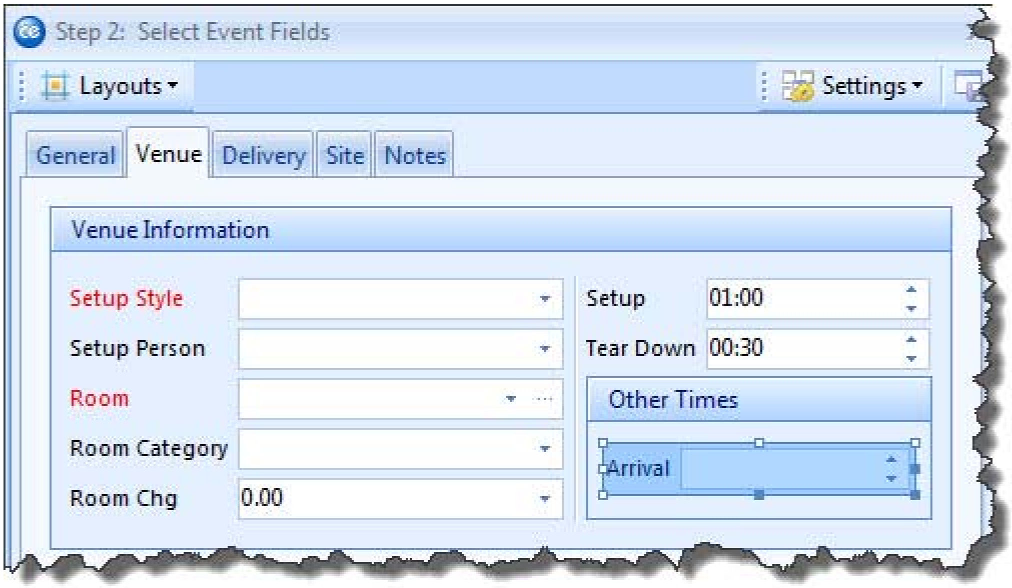
Result: The Customize window opens.
Note: Remember, do not right-click within fields or text boxes.

2. Click the **Venue** tab on the Event Wizard screen.
   Result: *That tab and its contents are displayed.*

3. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
4. Click the new item to edit its name, type Other Times and press **[Enter]**.
   Note: *If necessary, you can press your **[F2]** key to rename the item.*
5. Drag the new group item onto your Event Wizard screen and place it below the <u>Tear Down</u> field.
   Note: *Remember to pay careful attention to where you drop the field. If you make a mistake, click the **Undo** button  at the top left of the Customize window and try again.*



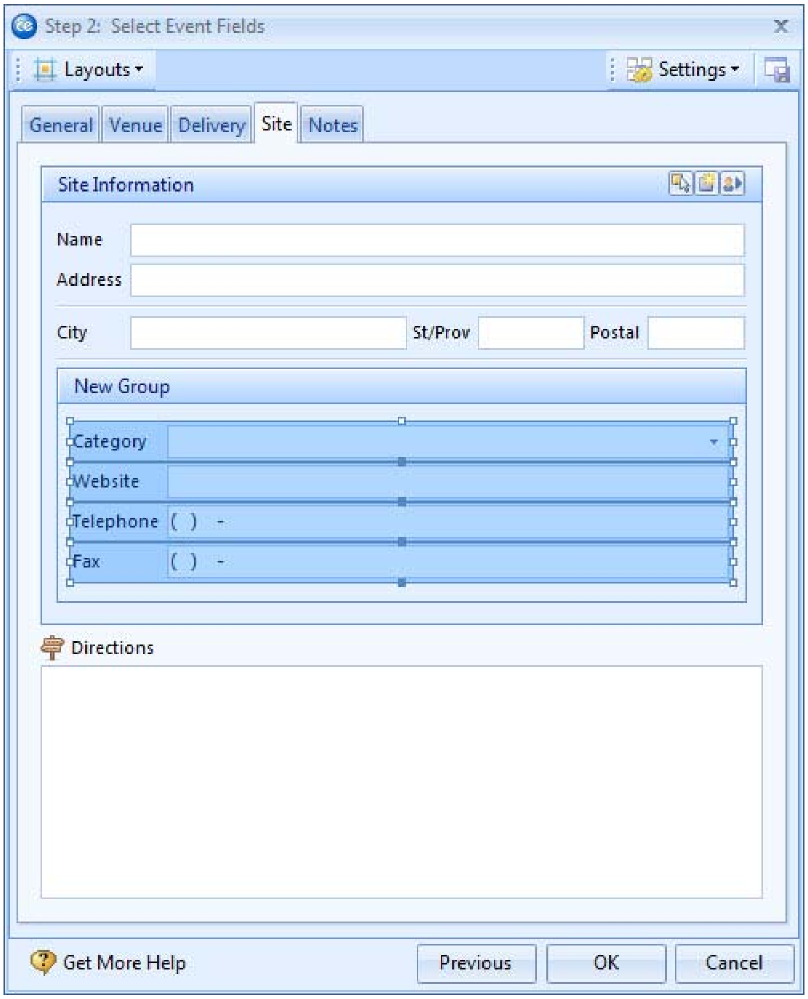
6. In the Available Items pane of the Customize window, hold your left mouse button down on the <u>Arrival</u> field.
7. Drag the <u>Arrival</u> field onto the screen and drop it inside your new Other Times group, being careful to place it <u>**within**</u> the group as shown on the following page.



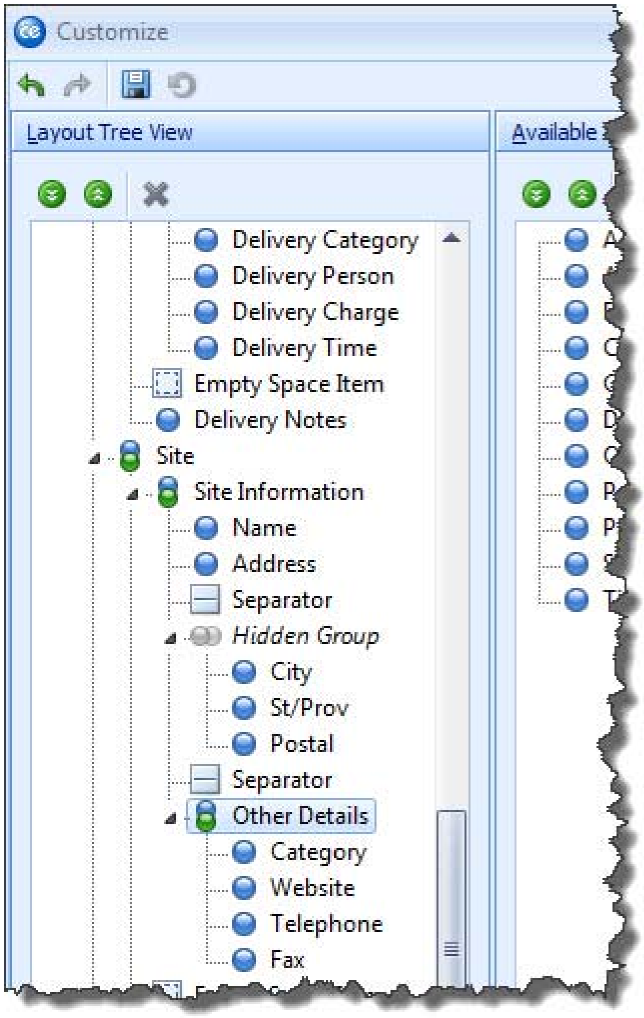
8. Repeat Steps 6 and 7 to place the <u>Departure</u> field within the Other Times group, as well.
   Note: *The new group stretches as you add these fields to it. You can right-click the* ***<u>group</u>*** *itself and choose* ***Horizontal Alignment > Right****, and then shrink the group if you want - or you can stretch or shrink the size of the Event Wizard window.*
9. When finished, click **Close** on the Customize window.

Organizing Existing Fields Into Groups

1. If the Customize window is not open, right-click anywhere (on Step 2 of the Event Wizard screen) and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Site** tab on the Event Wizard screen.
   Result: *That tab and its contents are displayed.*
3. Click the **Category** field to select it.
4. Hold your **[Shift]** key down and select the <u>Website</u>, <u>Telephone</u>, and <u>Fax</u> fields.
5. Right-click the fields and choose **Group**.
   Result: *The selected fields are placed in a group with the default title New Group. See image on following page.*

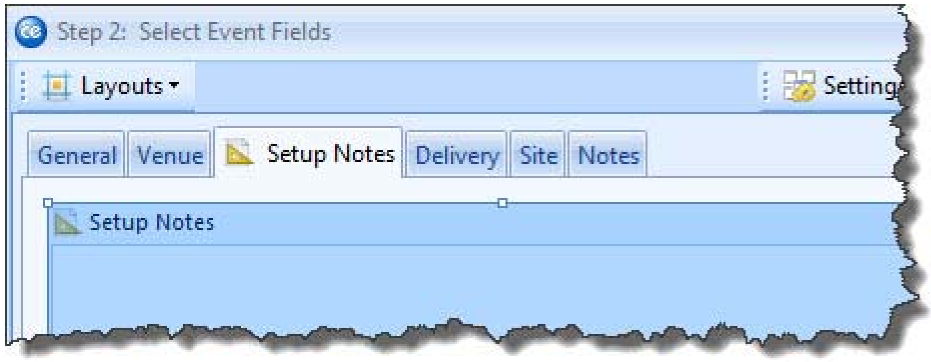


6. Click the name New Group in the Layout Tree View pane of the Customize window.
7. Click the name again, or press the **[F2]** key on your keyboard to rename.
8. Type the name **Other Details** and press your **[Enter]** key.
   Result: *The new group heading is updated on the screen with your new name (See image on following page.)*
9. When finished, click **Close** on the Customize window.

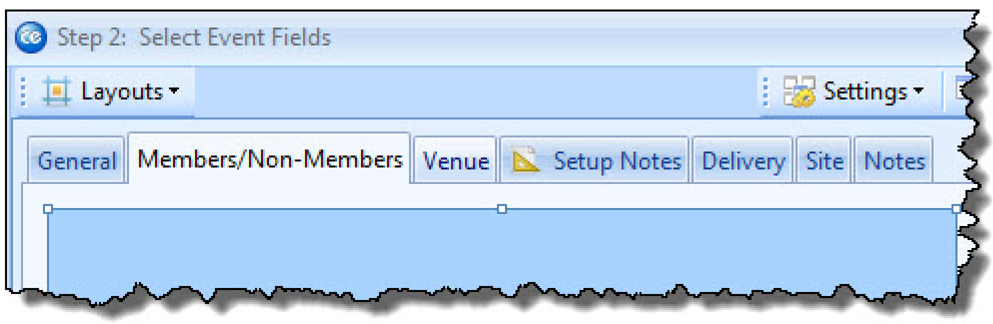


Creating New Tabs

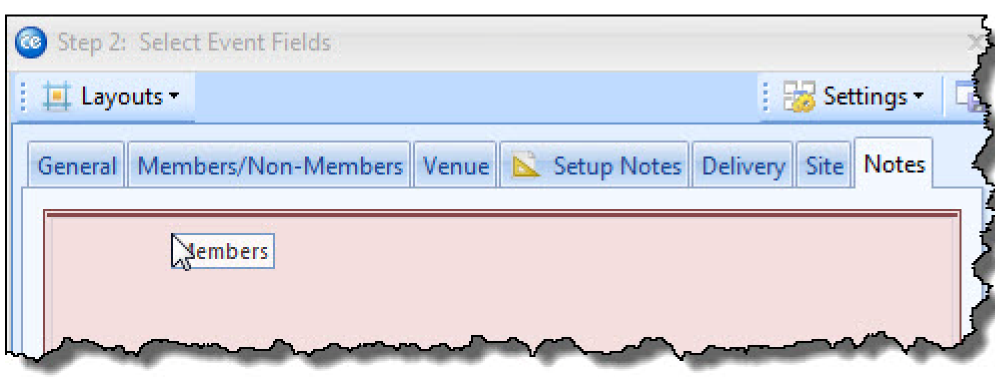
1. If the Customize window is not open, right-click anywhere on Step 2 of the Event Wizard screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
2. Click the **Venue** tab on the Event Wizard screen.
   Result: *That tab and its contents are displayed.*
3. Hold your left mouse button down on the Setup Notes text box at the bottom of the **Venue** tab and drag and drop it to the right of the **Venue** tab, making it an additional tab between **Venue** and **Delivery.**
   Note: *Remember to pay careful attention to where you drop the text box (see image on the following page). If you make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*



4. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
5. Click the new item to edit its name, type Adults/Children and press **[Enter]**.
   Note: *If necessary, you can press your **[F2]** key to rename the item.*
6. Drag the new group item onto your Event Wizard screen, carefully placing it to the right of the **General** tab.



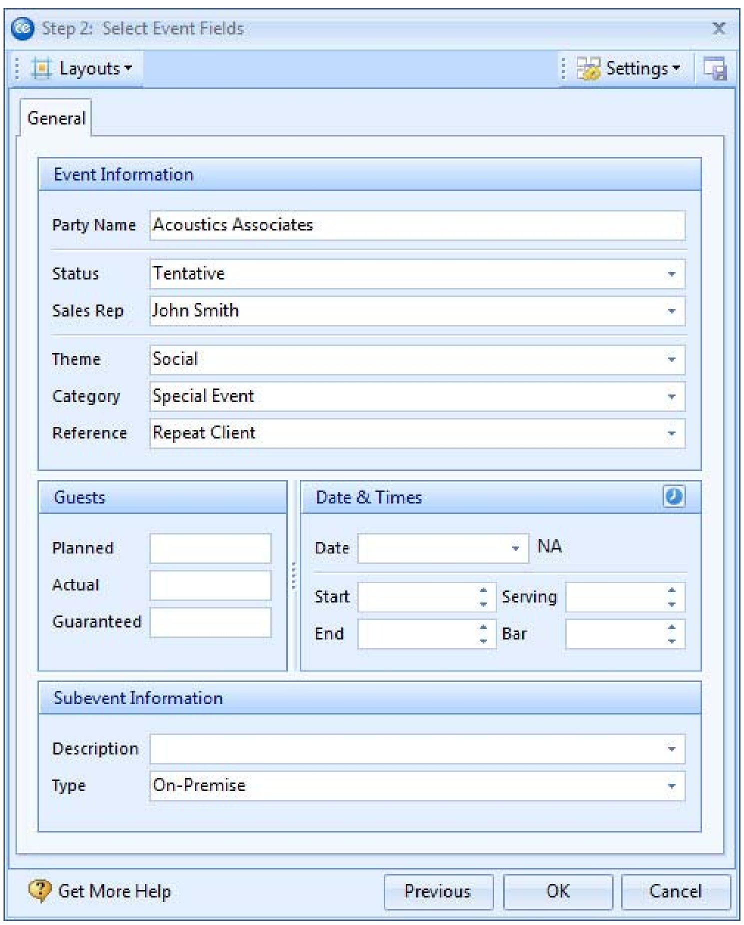
7. In the Available Items pane of the Customize window, hold your left mouse button down on the field <u>Members</u>.
8. Drag the field and drop it inside your new **Members/Non-Members** tab, being careful to place it **<u>within</u>** the tab, as shown below.



9. Repeat Steps 7-8 to drag the Non-Members field onto the new tab, as well.
10. When finished, click **Close** on the Customize window.

Changing Screen Layout

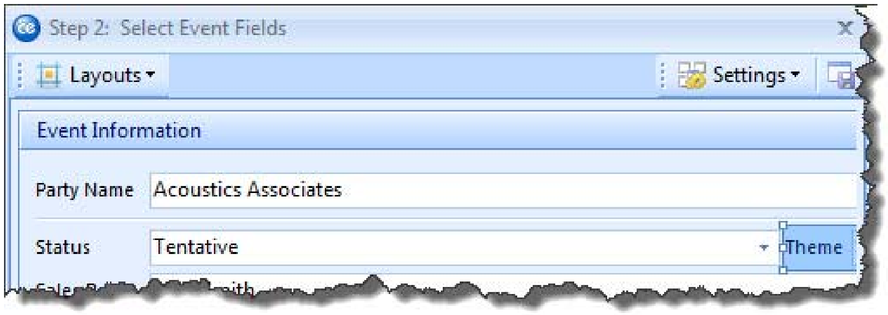
1. Open Event Wizard in its default layout.
   Note: *If you have changed the default layout using earlier topics in this tutorial, you can close Event Wizard without saving your window settings and reopen it. You can also continue here with a layout other than the default; however, images in this topic may look different than those on your screen*
2. Click the **Next** button at the bottom right of the Event Wizard to move to Step 2.
3. Right-click anywhere on the Event Wizard screen.
   Note: *Do not right-click within fields or text boxes, but rather on areas of the screen that do not allow data-entry.*
4. Hold your left mouse button down on the **Notes** tab on the Event Wizard screen, and drag and drop that tab into the Available Items pane of the Customize window.
   Result: *That tab is removed from the Event Wizard screen.*
5. Repeat Step 4 to remove the **Site, Delivery**, and **Venue** tabs, as well, leaving only the **General** tab remaining.



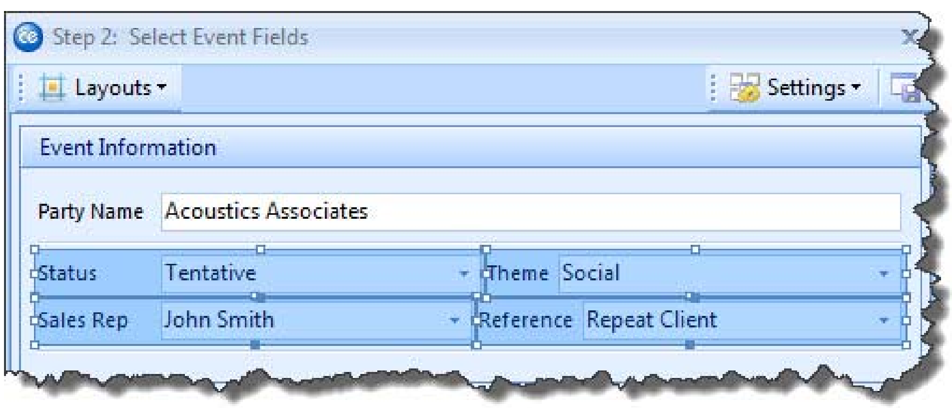
6. In the Layout Tree View pane of the Customize window, right-click the **General** group heading and choose **Ungroup**.
   Result: *The contents of the **General** tab are now displayed as three separate tabs on the Event Wizard screen.*
7. In the Layout Tree View pane of the Customize window, right click the **Root** group heading and choose **Layout Direction** > **Vertical**.
   Result: *The separate tabs on the Event Wizard screen are now displayed vertically down the screen.*

8. Hold your left mouse button down on the Category field on the Event Wizard screen and drag it and drop it in the Available Items pane of the Customize window.
   Result: *The field is removed from the Event Wizard screen.*
9. Hold your left mouse button down on the Theme field on the Event Wizard screen and **carefully** drop it to the right of the Status field.
   Result: *The field is moved, but does not fit horizontally on the Event Wizard screen.*
   Note: *Remember to pay careful attention to where you drop the field. If you*

*make a mistake, click the **Undo** button* *, at the top left of the Customize window, and try again.*

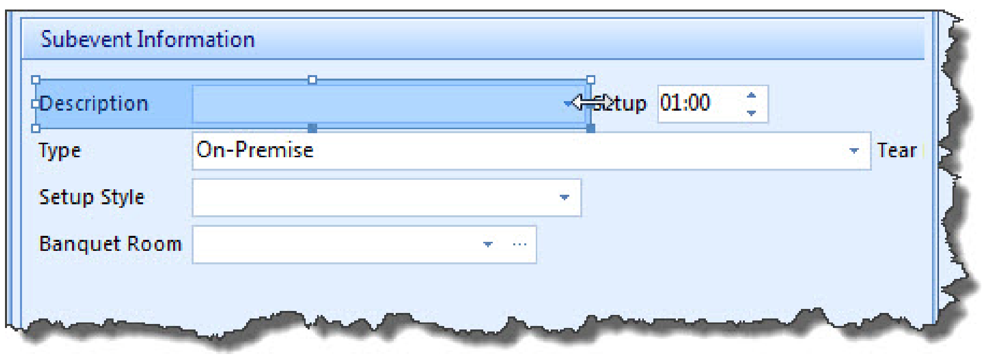


10. Repeat Step 9 to move the <u>Reference</u> field to the right of the <u>Sales Rep</u> field on the screen.
11. Hold your **[Ctrl]** key down and select the <u>Status</u>, <u>Theme</u>, <u>Sales Rep</u> and <u>Reference</u> fields simultaneously.
12. Click your right mouse button over the fields and choose **Horizontal Alignment > Client**.
    Result: *The fields are now evenly spaced across the screen.*
    Note: *The fields will likely not line up perfectly with one another, but each can be adjusted.*

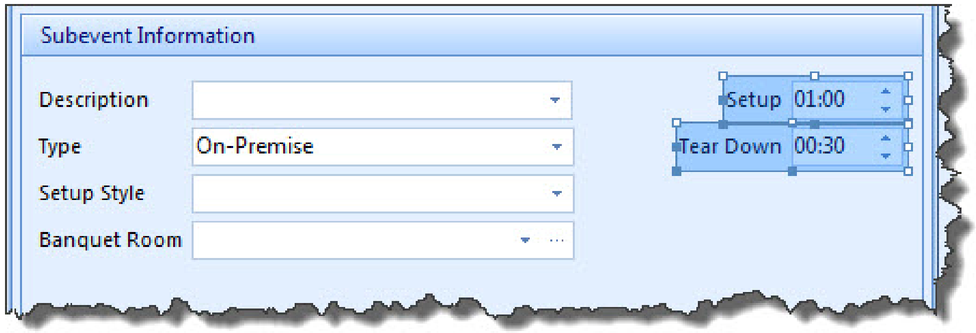


13. In the Available Items pane of the Customize window, locate the Setup Style and drag it and drop it onto the bottom of Event Wizard screen, **carefully** placing it below the <u>Type</u> field.
14. Repeat Step 13 to place the <u>Banquet Room</u> field below the <u>Setup Style</u> field on the screen.
15. Find the <u>Setup</u> field in the Available Items pane of the Customize window and drag it and drop it **to the right of** the <u>Description</u> field on the screen.
16. Repeat Step 15 to place the <u>Tear Down</u> field ***to the right of*** the <u>Type</u> field.

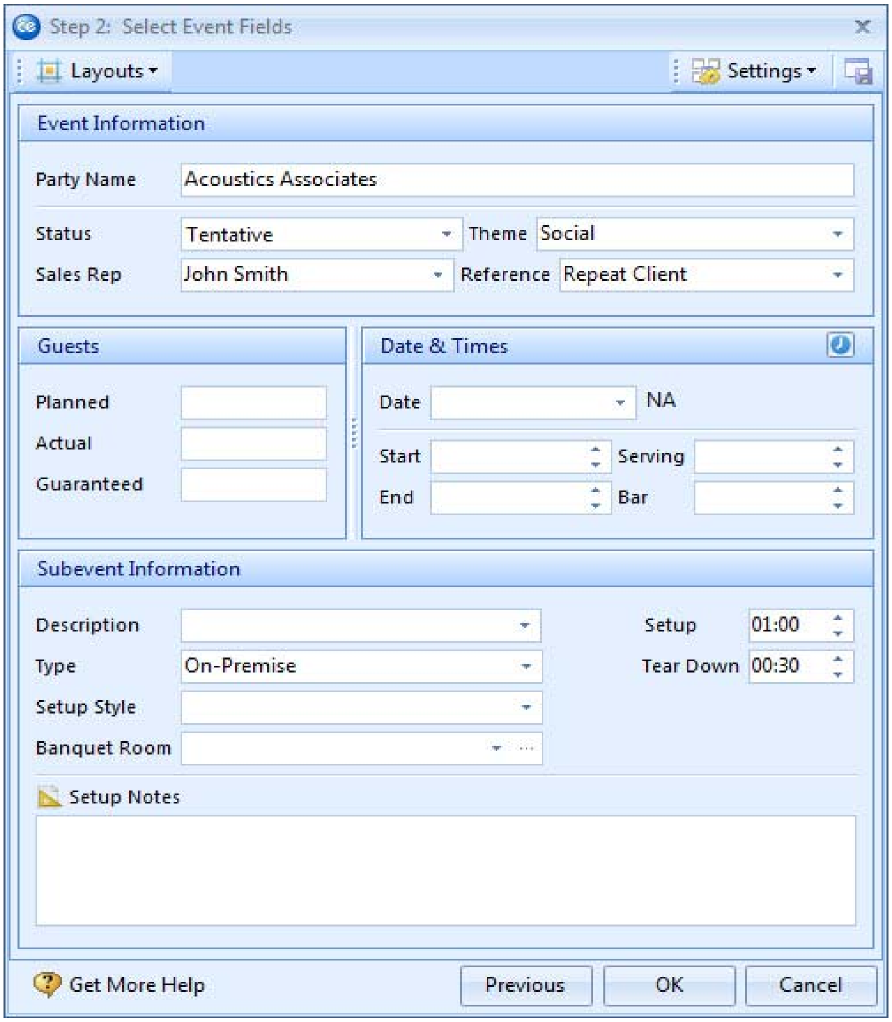
17. Hold the **[Ctrl]** key down on your keyboard and select the Description, Type, Setup Style, and Banquet Room fields simultaneously.
18. Click your right mouse button over the fields and choose **Horizontal Alignment > Left**.
    Result: *The fields are now aligned with the left edge of their group, and can now be stretched or shrunk by dragging the frames that surround them.*
19. Hold your left mouse button down on the right-side edge of the frame surrounding the Description field and drag to the left to shrink the field to about two-thirds the width of the Event Wizard screen.



20. Click the Type, Setup Style, and Banquet Room fields individually and repeat Step 19 to shrink each of them to the same width as the Description field.
21. Hold your **[Ctrl]** key down and click the Setup and Tear Down fields to select both simultaneously.
22. Click your right mouse button over the fields and choose **Horizontal Alignment > Right**.
    Result: *The fields are now aligned with the right-side edge of their group, and can now be stretched or shrunk by dragging the frames that surround them.*



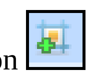
23. In the Layout Tree View pane of the Customize window, click the <u>Setup</u> field.
24. Click the field again, or press **[F2]** on your keyboard to rename the field.
25. Enter eight (8) spaces after the word Setup and press **[Enter]**.
    Result: *The label of the field has moved over to line up with <u>Tear Down</u> field below it.*
26. Hold your left mouse button down on the Separator item (horizontal line) below the <u>Sales Rep</u> and <u>Reference</u> fields and drag it and drop it beneath the <u>Banquet Rooms</u> field at the bottom of the screen.
27. Find the <u>Setup Notes</u> field in the Available Items pane of the Customize window and drag it and drop it below the separator item (below Banquet Room) on the screen.
    Result: *A text box is added to the Event Wizard screen, with the label Setup Notes to its left.*
28. Right-click the Setup Notes text box and choose **Caption Position** > **Top**.
    Result: *The caption for is moved above the text box.*
29. When finished, click **Close** on the Customize window. (See image on following page.)

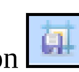


Saving Custom Layouts

1. Customize the Event Wizard screen based on the topics above.
2. Click the **Layouts** button at the top left of the Event Wizard window and choose **Custom**.
   Result: *The Custom Layouts window appears.(See image on following page.)*

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:*** *Local 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 the layout name and choosing* ***Copy From Current****.*

5. Type a name for new layout and click the **Save Current Layout** button .
Note: *If you create wizards with the same names as your event Categories or Business Types, these wizards will automatically honor any required fields you have established for events with those conditions.*
6. Click the X at the top right of the Custom Layout window to close it.

Unit 4: Customizing the Account Manager Display

Objectives:

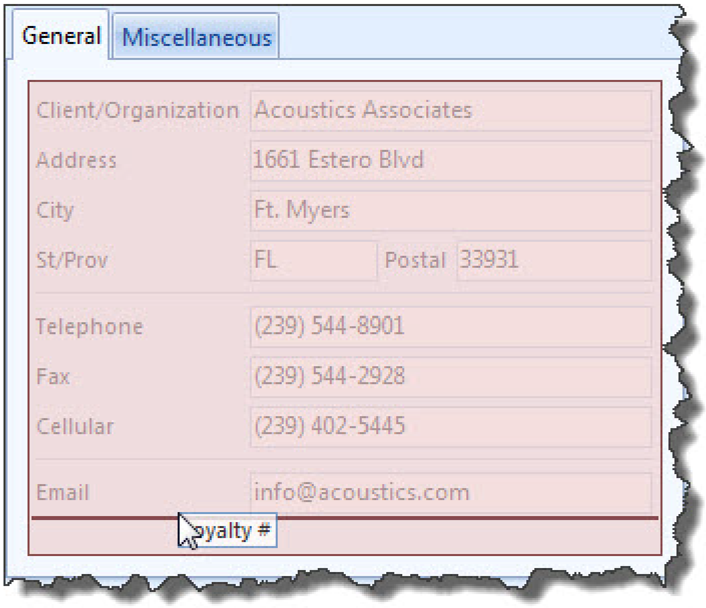
Upon completing this unit, you will be able to:

- *Arrange and space fields on the Account Manager screen.*
- *Stretch and shrink fields on the Account Manager screen.*
- *Insert spacers, splitters, and separators onto the Account Manager screen.*
- *Create new groups for fields and organize existing fields.*
- *Create new tabs.*
- *Modify and save your new screen layout.*

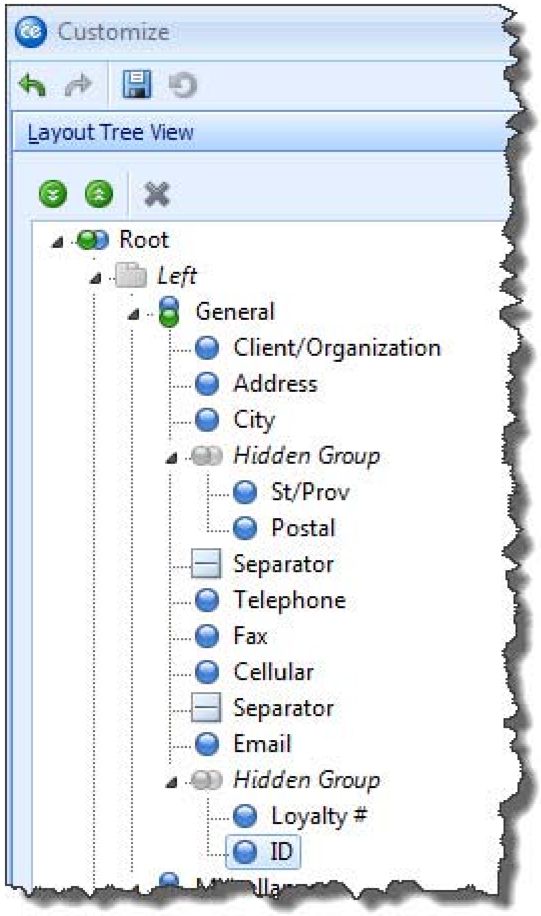
Arranging and Spacing Fields on the Screen

1. Open Account Manager.
   Note: *This topic assumes you are using the default layout of Account Manager.*
2. Right-click anywhere in the top half of the screen.
   Note: *Do not right-click within fields or text boxes (or in the grid to the left), but rather on areas of the screen that do not allow data-entry.*
3. Choose **Customize**.
   Result: *The Customize window appears.*
   Note: *The left pane of this window, Layout Tree View, lists fields and other screen elements already displayed on the screen; the right pane, Available Items, lists other objects that can be placed on the screen.*
4. Hold your left mouse button down on the Loyalty # field in the Available Items pane on the right-hand side of the Customize window.
5. Drag this field onto the **General** tab, but **do not drop it yet**.
   Important Note: *Because objects on the screen exist in groups, it is important to* ***carefully note*** *where you are dropping things you drag in. As you move this Loyalty # field over the* **General** *tab, note that you can place it above certain fields, below them, to either side of them - as well as even using this new field to create a whole new tab in addition to the existing General and Miscellaneous tabs.*
6. Carefully drop the Loyalty # field below the Email field, at the bottom of the **General** tab.

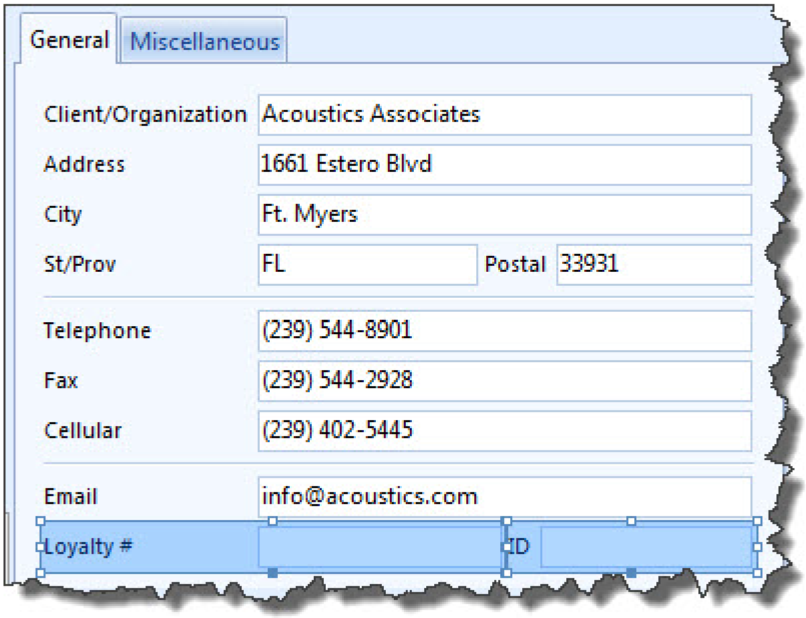
Note: *If you make a mistake, click the* **Undo** *button* *, at the top left of the Customize window, and try again.*



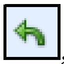
7. Hold your left mouse button down on the ID field, also in the right-hand pane of the Customize window.
8. Drag this field and drop it to the right of your new Loyalty # field.
   Result: *Both fields appear, but have stretched the* **General** *tab on the screen.*
   Important Note: *Please note in the Layout Tree View pane (left-hand side of the Customize window), that a Hidden Group has been automatically created to house these two fields. Because fields are displayed vertically on the screen (by default), when you deliberately make them horizontal a new hidden group must be created. (These groups will be automatically deleted if you remove horizontal fields.) (See image on following page.)*

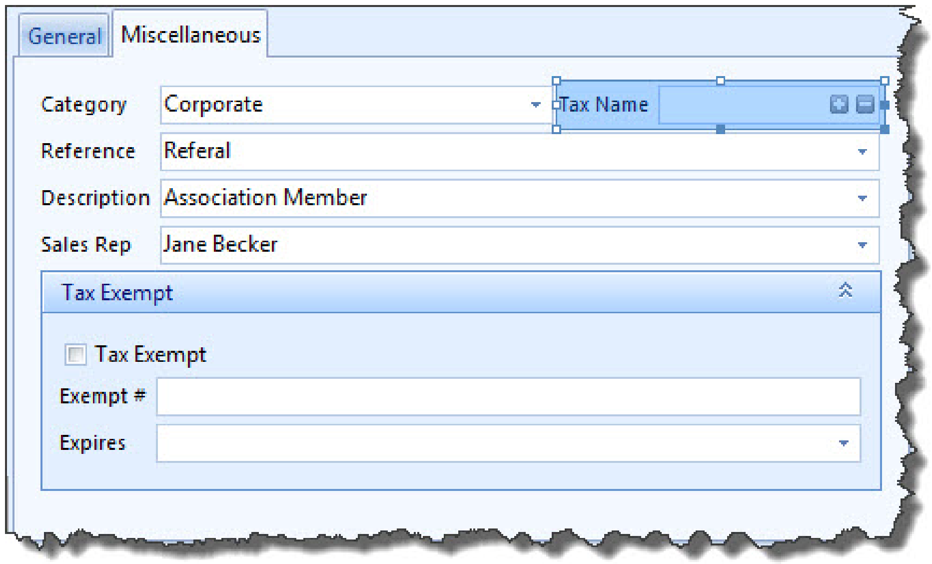


9. Click the **caption** (name) of the Loyalty # field, hold the **[Ctrl]** key down on your keyboard, and click the **caption** of the ID field to select both simultaneously.
10. Right-click over the fields and choose **Horizontal Alignment > Client** to spread the fields out evenly within their current group on the left-hand side of the **General** tab.
    Note: *You are also welcome to stretch and shrink the height and width of the Account Manager window.*
11. When finished, click **Close** on the Customize window. (See image on following page.)

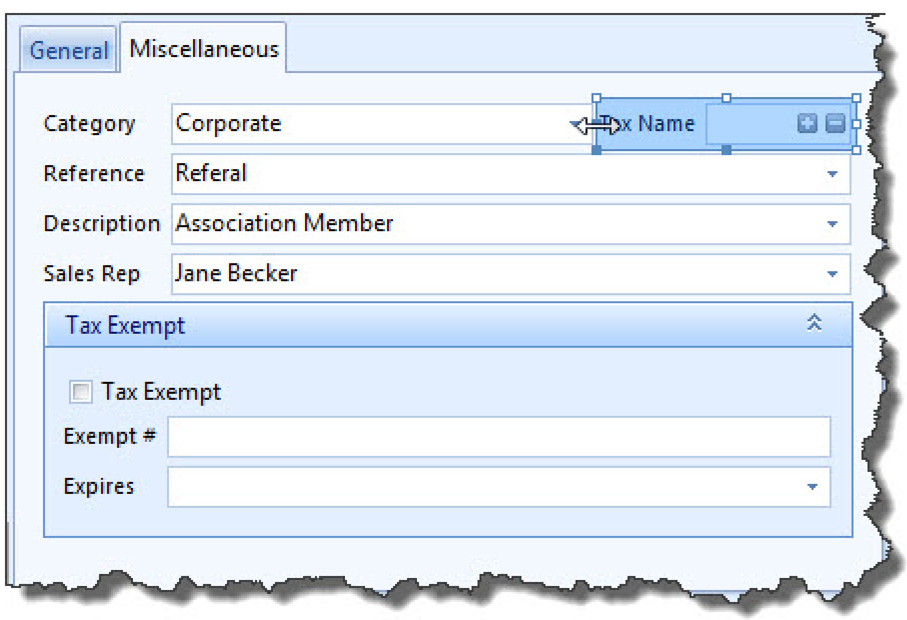


Stretching and Shrinking Fields

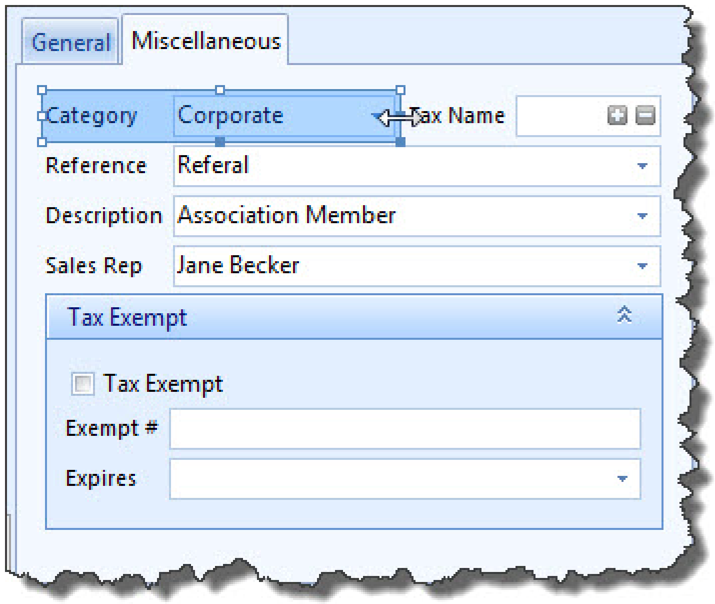
1. If the Customize window is not open, right-click on your Account Manager screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes or within the grid*
2. Click the **Miscellaneous** tab on the Account Manager screen, or in the Layout Tree View pane on the left of the Customize window.
   Result: *That tab and its contents are displayed on the screen.*
3. On the right-hand side of the Customize window, hold your left mouse button down on the <u>Tax Name</u> field.
4. Drag the field onto your screen and drop it to the right of the <u>Category</u> field, at the top of the **Miscellaneous** tab.
   Result: *The field is dropped in place, but does not fit horizontally on the tab.*
   Note: *Remember to pay careful attention to where you drop the field. If you make a mistake, click the* ***Undo*** *button* *, at the top left of the Customize window, and try again.*



5. Right-click the <u>Tax Name</u> field on the screen and choose **Horizontal Alignment > Right**.
Result: *The field is now aligned with the right edge of its group (the right-hand side of the* **Miscellaneous** *tab), and can now be stretched or shrunk by dragging the frame that surrounds it.*
6. Grab the left edge of the frame surrounding the <u>Tax Name</u> field and drag to the right to shrink the width of the field to roughly half of its current width.
Result: *The field shrinks, and the right edge of the* **Miscellaneous** *tab moves left on the screen.*

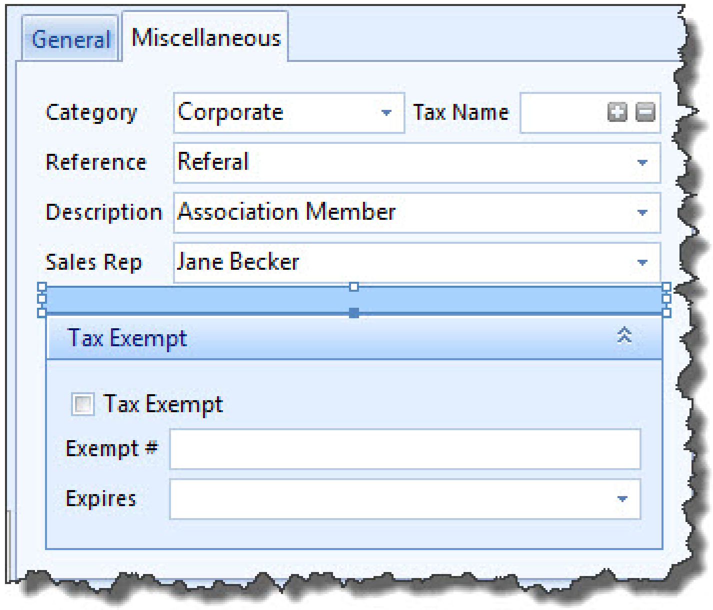


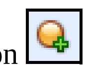
7. Click the Category field and drag its right edge to shrink it to roughly half its current width.
8. When finished, click **Close** on the Customize window.

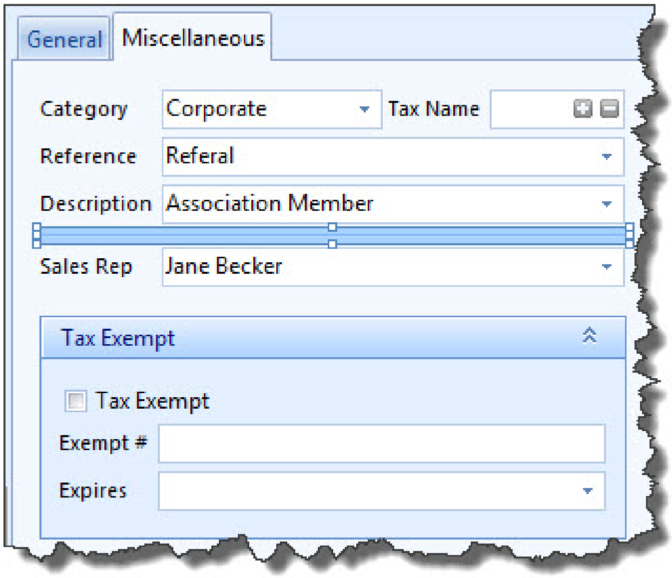


Inserting Spacers, Splitters, and Separators

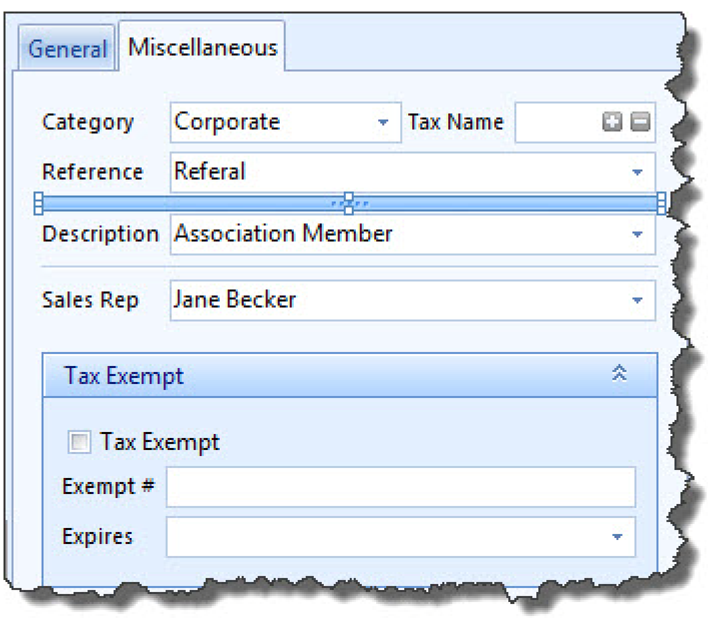
1. If the Customize window is not open, right-click on your Account Manager screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes or within the grid.*
2. Click the **Miscellaneous** tab on the Account Manager screen, if it is not already displayed.
   Result: *That tab and its contents are displayed on the screen.*
3. On the top right of the Customize window, click the **Add Auxiliary Item** button .
4. Choose **Add Empty Space Item**.
   Result: *A new Empty Space Item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
5. Hold your left mouse button down on the new item and drag it and drop it below the Sales Rep field on the **Miscellaneous** tab.
   Result: *The item adds blank space below the field, and can be stretched and shrunk to increase or decrease the space.*
   Note: *Remember to pay careful attention to where you drop the item. If you make a mistake, click the **Undo** button*  *at the top left of the Customize window and try again.*



6. Click the **Add Auxiliary Item** button  again (as in Step 3) and choose **Add Separator Item**.
__Result:__ A new Separator item is added to the top of the Available Items pane on the right side of the Customize Window
7. Hold your left mouse button down on the new item and drag it and ***carefully*** drop it beneath the <u>Description</u> field on the **Miscellaneous** tab.
__Result:__ The item adds a separator line below the field.
__Note:__ Notice as you drag that the size of the separator line adjusts automatically, depending on the width of the fields it is separating, and even automatically becomes a vertical line if placed beside a field rather than above or below it.



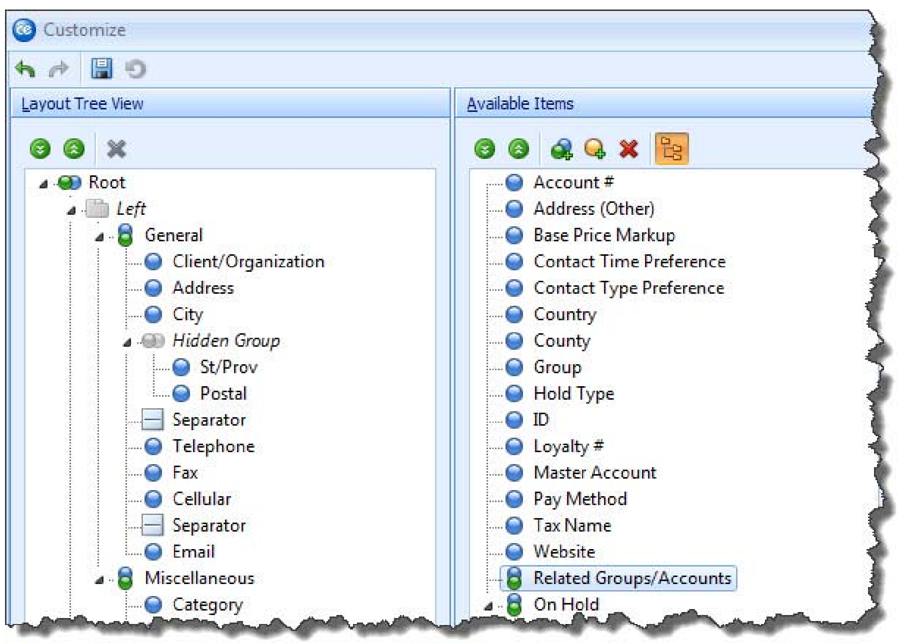
8. Click the **Add Auxiliary Item** button  again and choose **Add Splitter Item**.
   Result: *A new Splitter item is added to the top of the Available Items pane on the right-hand side of the Customize Window.*
9. Hold your left mouse button down on the new item and drag it and **<u>carefully</u>** drop it below the <u>Reference</u> field on the **Miscellaneous** tab.
   Result: *The item adds a splitter line below the field.*
   Note: *Splitter lines are often used to separate entire groups of fields, and can be placed horizontally or vertically on the screen.*
10. When finished, click **Close** on the Customize window.



Creating New Groups for Fields

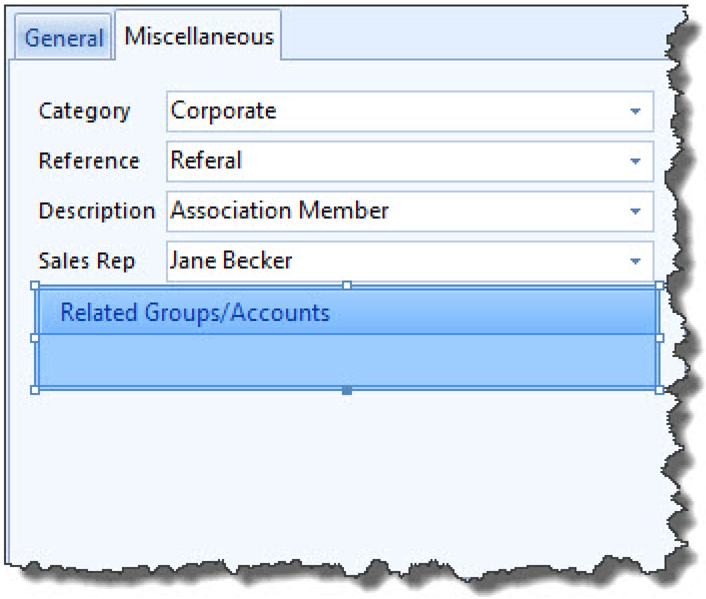
1. If the Customize window is not open, right-click on your Account Manager screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes or within the grid.*

2. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
3. Click the new item to edit its name, type Related Groups/Accounts and press **[Enter]**.
   Note: *If necessary, you can press your **[F2]** key to rename the item.*

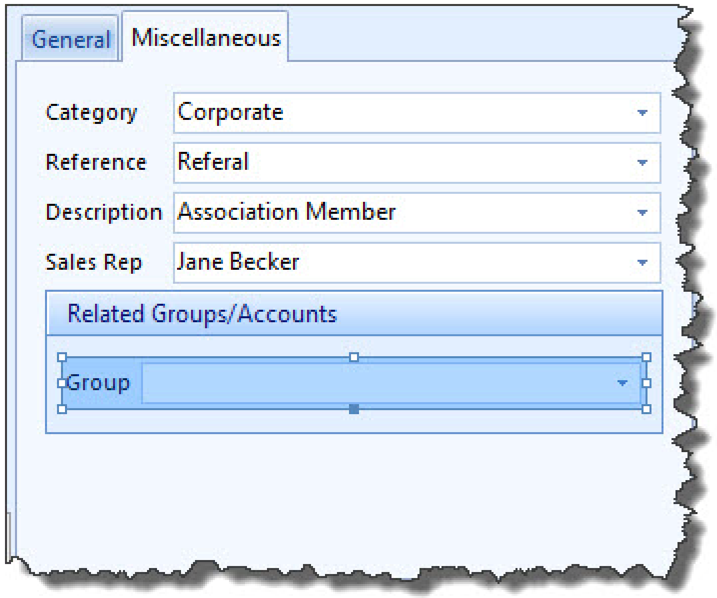


4. Click the **Miscellaneous** tab on the Account Manager screen, if it is not already displayed.
   Result: *That tab and its contents are displayed on the screen.*
5. In the **Miscellaneous** tab on the screen, hold your left mouse button down on the group heading **Tax Exempt.**
6. Drag that group and drop it into the Available Items pane of the customize window.
   Result: *That group and its related fields are removed from the screen.*
   Note: *Because the bottom half of this screen cannot be customized, this step is just to make room on the* **Miscellaneous** *tab. If you wanted more fields to be displayed, you could stretch the top half of the Account Manager screen so it offers more room.*

7. Drag your new Related Groups/Accounts group item onto your the **Miscellaneous** tab, below the Sales Rep field.
   Note: *Be careful to drop the group BELOW the Sales Rep field. If you make a mistake, click the* ***Undo*** *button* *, at the top left of the Customize window, and try again.*



8. In the Available Items pane of the Customize window, hold your left mouse button down on the Group field.
9. Drag the Group field onto the screen and drop it inside your new Related Groups/Accounts group, being careful to place it **within** the group as shown on the following page.

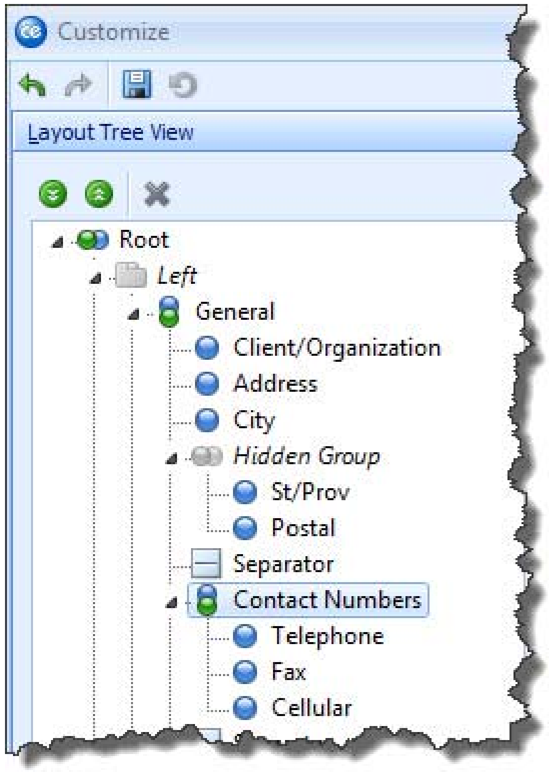


10. Repeat Steps 8 and 9 to place the Master Account field within the Related Groups/Accounts group, as well.
11. When finished, click **Close** on the Customize window.

Organizing Existing Fields Into Groups

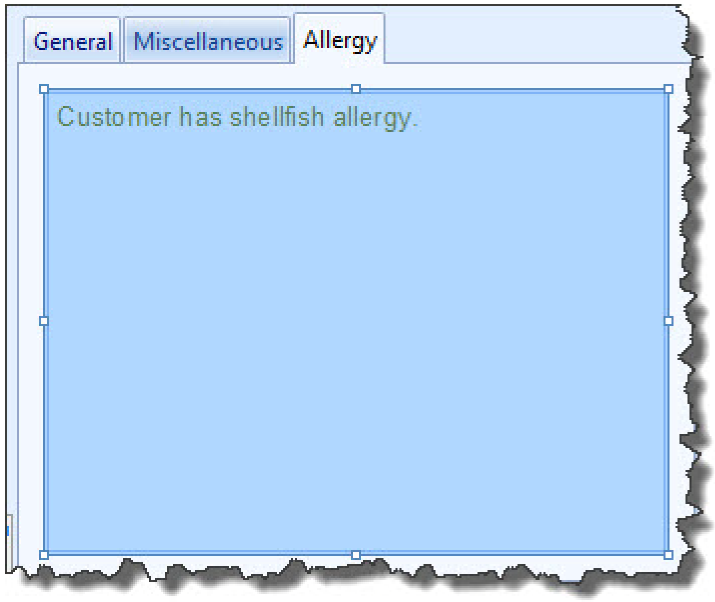
1. If the Customize window is not open, right-click on your Account Manager screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes or within the grid.*
2. Click the **General** tab on the Account Manager screen, if it is not already displayed.
   Result: *That tab and its contents are displayed on the screen.*
3. In the **General** tab on the screen, click the <u>Telephone</u> field to select it.
4. Hold your **[Shift]** key down and select the <u>Fax</u> and <u>Cellular</u> fields.
5. Right-click the fields and choose **Group**.
   Result: *The selected fields are placed in a group with the default title New Group. See image on following page.*

6. Click the name New Group in the Layout Tree View pane of the customize window.
7. Click the name again, or press the **[F2]** key on your keyboard to rename.
8. Type the name Contact Numbers and press your **[Enter]** key.
   Result: *The new group heading is updated on the screen with your new name.*
9. When finished, click **Close** on the Customize window.

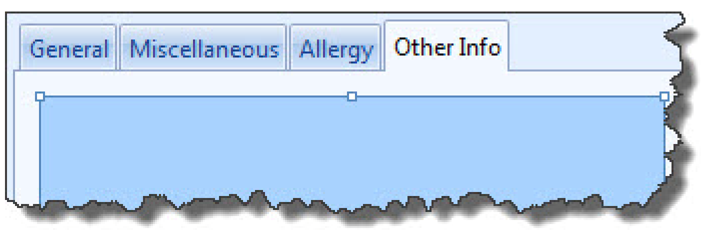


Creating New Tabs

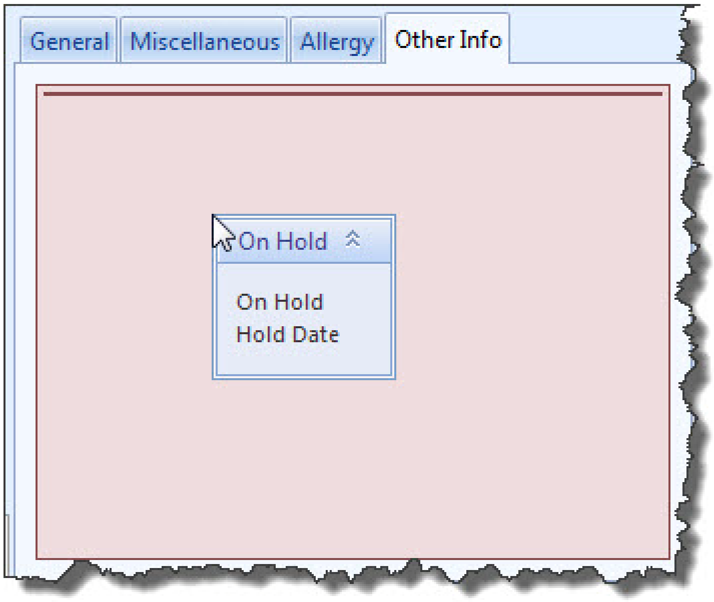
1. If the Customize window is not open, right-click on your Account Manager screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes or within the grid.*
2. Hold your left mouse button down on the **Allergy** tab at the top right of the Account Manager screen.
3. Drag the **Allergy** tab and drop it to the right of the **Miscellaneous** tab at the top left.
   Note: *Remember to pay careful attention to where you drop the tab (see image on the following page). If you make a mistake, click the **Undo** button at*  *the top left of the Customize window and try again.*



4. At the top right of the Customize window, click the **Add Group** button .
   Result: *An item named New Group is added to the Available Items pane of the window.*
5. Click the new item to edit its name, type Other Info and press **[Enter]**.
   Note: *If necessary, you can press your* ***[F2]*** *key to rename the item.*
6. Drag the new group item onto your Account Manager screen, carefully placing it to the right of the **Allergy** tab you moved in Step 2, above.

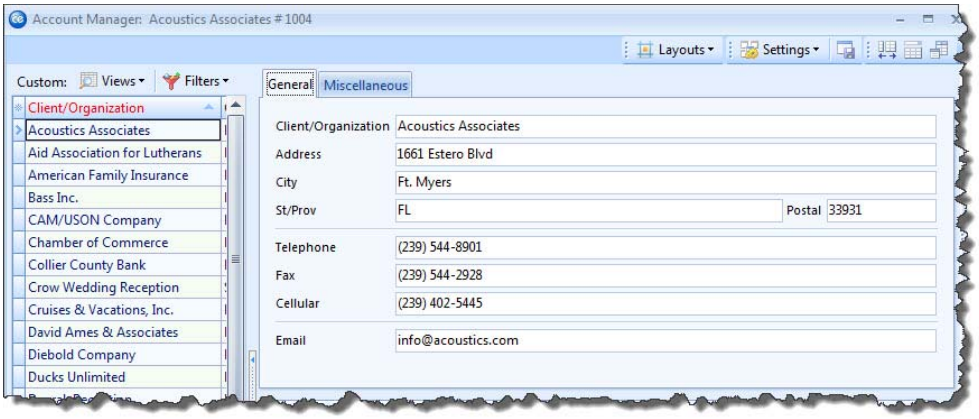


7. In the Available Items pane of the Customize window, hold your left mouse button down on the group heading **On Hold**.
8. Drag the heading and drop it (and its corresponding fields) inside your new **Other Info** tab, being careful to place it **<u>within</u>** the tab as shown in the image on the following page.
9. When finished, click **Close** on the Customize window.



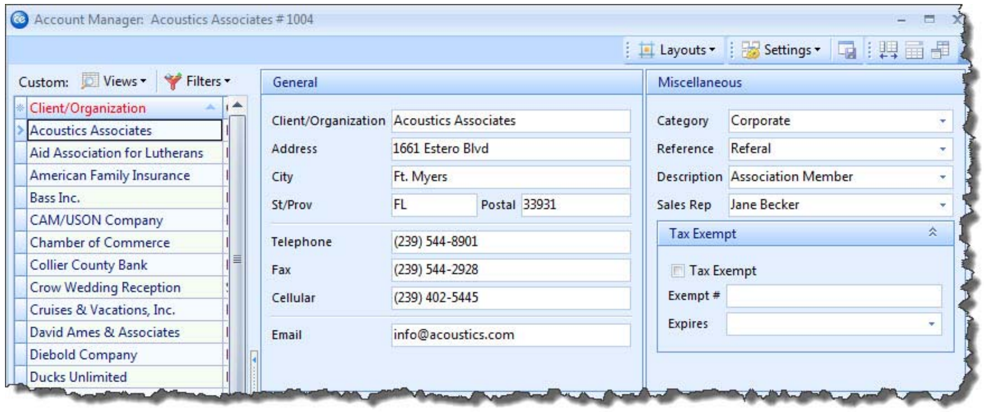
Changing Screen Layout

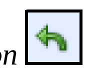
1. Open Account Manager in its default layout.
   Note: *If you have changed the default layout using earlier topics in this tutorial, you can close Account Manager without saving your window settings and reopen it. You can also continue here with a layout other than the default; however, images in this topic may look different from those your screen.*
2. Right-click on the Account Manager screen and choose **Customize**.
   Result: *The Customize window opens.*
   Note: *Remember, do not right-click within fields or text boxes.*
3. In the Layout Tree View pane of the Customize window, hold your left mouse button down on the group heading **Right**.
4. Drag the heading (its associated fields will move with it) into the Available Items pane of the Customize window and drop it.
   Result: *The four tabs at the top right of your Account Manager screen - Notes, Directions, Allergy and Picture - are removed from your screen, and the remaining tabs stretch the entire width of the screen.*
   Note: *You may not be able to see these changes behind the Customize window. You can close it and reopen it if you wish.*

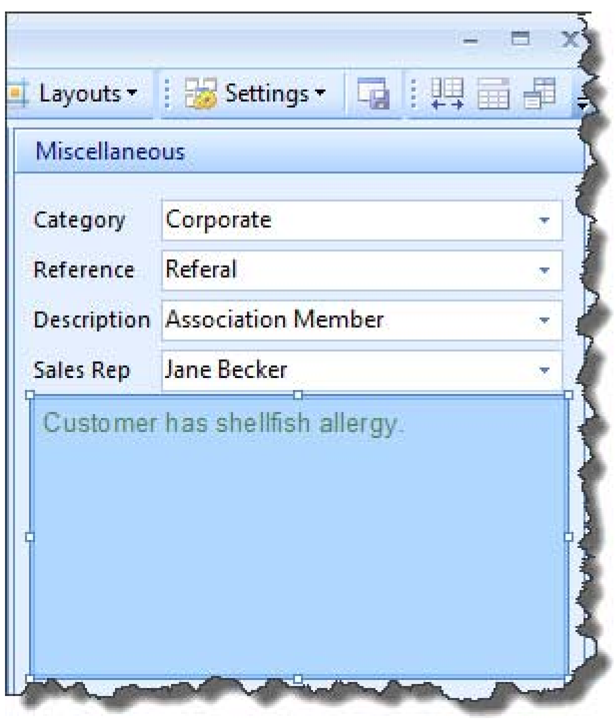


5. At the bottom of the Layout Tree View pane on the Customize window, drag the Splitter item and drop it in the Available Items pane to remove it from the screen.
6. In the Layout Tree View pane, right-click the **Root** group.
7. Choose **Layout Direction** > **Horizontal**.
   Result: *The General and Miscellaneous groups are no longer displayed as separate tabs, but rather are shown beside each other on the screen (although at this point they are not fitting cleanly).*
   Note: *Again, these changes might be blocked by your Customize window.*

8. In the Layout Tree View pane, right-click the **General** group and choose **Horizontal Alignment** > **Client**.
9. In the Layout Tree View pane, right-click the **Miscellaneous** group and choose **Horizontal Alignment** > **Client**.
   Result: *The two groups are now evenly spaced across the screen.*



10. Hold your left mouse button down on the **Tax Exempt** group on the screen and drag it and drop it into the Available Items pane on the Customize window.
    Result: *The group (and its related fields) are removed from the screen.*
    Note: *You can also drag groups or fields from the Layout Tree View pane into the Available Fields pane to remove them.*
11. In the Available Items pane, hold your left mouse button down on the Allergy text box and drag it onto the screen and drop it below the Sales Rep field (where the Tax Exempt group had been).
    Note: *Remember to pay careful attention to where you drop the item. If you make a mistake, click the* ***Undo*** *button*  *at the top left of the Customize window and try again.*



12. Right-click the Allergy text box (either on the screen or in the Layout Tree View pane) and click **Caption**.
    Result: *The caption Allergy appears to the left of the text box.*
13. Right-click the text box again and click **Caption Position** > **Top**.
14. In the Available Items pane of the Customize window, drag the Splitter item and drop it below the Sales Rep field (directly above the Allergy caption).
15. When finished, click **Close** on the Customize window.

Saving Custom Layouts

1. Customize the Account Manager screen based on the topics above.
2. Click the **Layouts** button at the top right of the Account Manager window and choose **Custom**.
   Result: *The Custom Layouts window appears*. (*See image on following page.)*

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:*** *Local 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 Lay-out.*
   Note: *You can update an existing layout on the list to show your current screen display by right-clicking the layout name and choosing* ***Copy From Current****.*

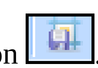
5. Type a name for new layout and click the **Save Current Layout** button .
6. Click the X at the top right of the Custom Layout window to close it.

Table of Things I Want to Remember

This table has been provided as a quick reference of things you've learned in this book. You can write notes to yourself, and include the corresponding page in the book that discusses that topic. That way, rather than skimming through this entire book to find important information you need, you can simply refer to this table, and then turn to the appropriate page when necessary.

Notes	Page

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