caterease
catering + event planning solution

Training Guide

Creating Custom Merge Documents in Marketing Tools

TABLE OF CONTENTS

TABLE OF CONTENTS

Unit 1: Creating New Merge Documents

The Caterease Marketing Tools package is a powerful add-in to the basic Caterease program. It allows you to create any number of merge documents and envelopes and to generate labels in a variety of pre-formatted Avery styles.

In case you're unfamiliar with the term, a merge document is a type of document that enables you to generate special fields throughout the text, and these fields will dynamically pull in information from any Caterease event. A basic merge document typically looks something like this:

Dear [So-and-So],

You have [a certain party] in [a certain room] on [a certain date].

Sincerely,

[Sales Rep]

All of the information in brackets will dynamically merge in the appropriate data from specific events. Therefore, one document that you type **one time** will look completely unique for each separate event.

Objectives:

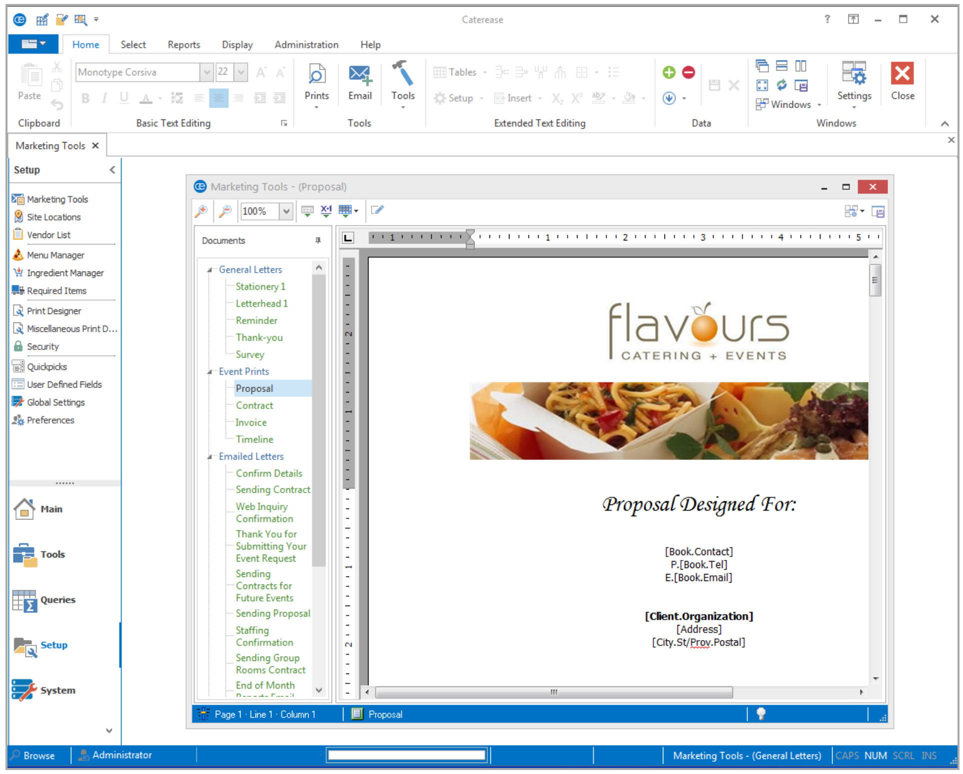
Upon completing this unit, you will be able to:

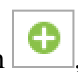
- *Access the Marketing Tools package.*
- *Add a new document.*
- *Create document categories using "child records."*
- *Insert images into a document.*
- *Add merge fields to a document.*
- *Format text in a document.*

Adding a New Document or Envelope

Tip: *For long lists of merge documents, see "Organizing Documents into Groups" for details on organizing them into groups.*

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



2. Click the **Add Record** button , located on **Home** ribbon tab at the top of your Caterease screen.
   Result: *A confirmation prompt appears.*

3. Click **Yes** to confirm your choice.
   Result: *A new blank document is added to your list, with your cursor positioned in the Documents pane on the left-hand side of your screen, to type a new title.*
   Note: *The new document will default to "letter" size (8.5 X 11). See the next few steps for details on changing the paper size.*

4. Click anywhere inside your newly added document.

5. **[Optional]** Click the **Setup** button in the **Home** ribbon tab at the top of the screen and choose **Page Setup** to change paper size, margins, and orientation (for envelopes or other custom documents).
   Note: *"Landscape" orientation is typically preferable for envelopes.*

6. Type a name for your new document and press your **[Enter]** key.
   Result: *Your new document name is saved.*

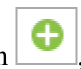
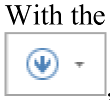
7. Click into the blank document and type as desired, inserting merge fields as described in subsequent topics.

Copying an Existing Merge Document

Tip: *See "Organizing Documents into Groups" for information on dragging and dropping this new document title in the list.*

1. Right-click on the title of the document you want to copy, from the Documents list on the left-hand side of your screen.
2. Choose **Copy Document**.
   Result: *A confirmation prompt appears.*
3. Click **Yes** to confirm.
   Result: A copy of the document is added to your document list, with the cursor in the title field, ready for you to type a new title.
4. Type a name for the new copy, and press your **[Enter]** key.
   Result: *Your new document name is saved.*

Organizing Documents into Groups

1. With the Marketing Tools window open, click the **Add Record** button , located on the **Home** ribbon tab at the top of your screen.
   Result: *A new blank document is added to your list, with your cursor positioned to type a new title.*
2. Type a group heading (for example, "Printed Documents," "Emailed Documents," etc.), and press your **[Enter]** key.
   Result: *Your new "group" (document) name is saved.*
3. With the group heading you just created highlighted, click down-arrow icon , located on the **Home** ribbon tab at the top of your screen, and choose **Add Child Record** button .
   Result: *A new document is created as a "child" sub-record of the group heading you had highlighted.*
4. Type a title for your new document, and press your **[Enter**] key.
5. Edit your new document as desired in subsequent sections of this guide.
6. **[Optional]** You can also drag and drop document titles into different positions in the title pane (left-hand side of the Marketing Tools window). As you drag, pay attention to your mouse pointer for the following indicators:
   -  **Drop Above**
     Indicates that the document you are dragging will be dropped above another document.

- **Drop Below**
  Indicates that the document you are dragging will be dropped below another document.

- **Drop As Child**
  Indicates that the document you are dragging will become a child record (sub-record) of another document.

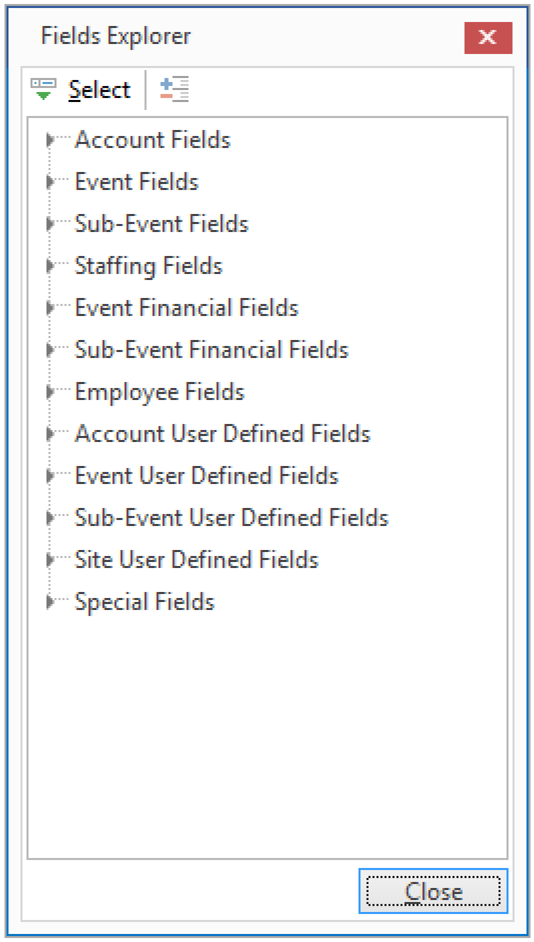
Inserting Dynamic Merge Fields

1. Select the title of the document to which you want to add merge fields, from the Documents list on the left-hand side of the screen.
   Result: *The selected document is displayed in the main area of the Marketing Tools window.*

2. Click into the document to place your cursor where you want the merge field to be inserted.

3. Click the **Insert Merge Fields** button, located at the top left-hand side of your Marketing Tools window.

Result: *The Fields Explorer window opens.*



__Tip:__ If you plan to insert several merge fields, you may want to leave this window open and drag it out of the way so you can see your print underneath.

4. Click the expand button (triangle) to the left of a particular category of fields (e.g., Event Fields, Financial Fields, etc).
   Result: *The selected category opens to show all related fields.*

   Note: *As an option, click the* ***Full Expand*** *button*  to expand all categories of merge fields at once.

5. Select a field, and insert it in one of the following ways:

   - Double-click the selected field to drop it in the current cursor position (where your cursor currently resides).
   - Hold your left mouse button down on the field, drag it into any position on your letter, envelope, or comments section, and release.
   - Click the **Select** button to drop the field in the current cursor position.

Inserting Images into a Merge Document

Images can be added to your merge documents to create attractive, graphic effects. These images can be attached to the text so they move with it, or they can be specifically placed on different areas of the page. Faded images can even be used as watermarks.

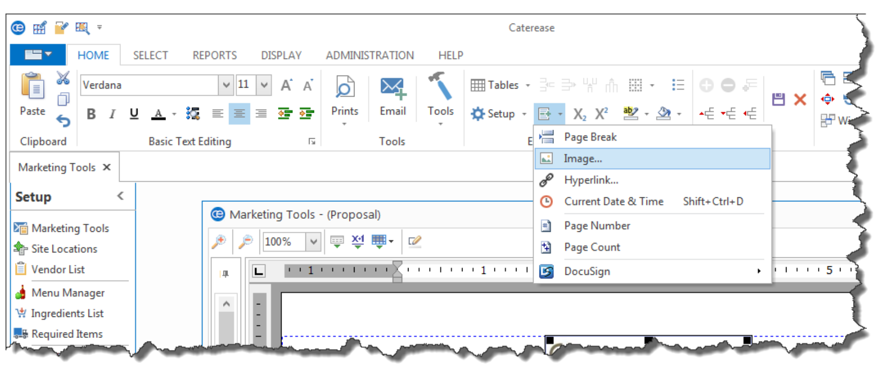
Inserting an Image into a Document

1. Click the **Setup** sidebar and choose **Marketing Tools**.
   Result: *The Marketing Tools window opens.*
   Note: *As an option, you can click the **Administration** ribbon tab, located at the top of your screen, and choose **Prints > Marketing Tools**.*

2. Select a document from the Documents list located on the left-hand side of your screen.

3. Click into the document where you would like the image to be inserted.

4. Click the **Insert** button , located in the **Home** ribbon tab at the top of your screen, and choose **Image**.
   Result: *A window opens, allowing you to browse to an image.*
   Note: *You may also right-click anywhere within the document and choose **Insert** > **Image**.*



5. Browse to your desired image and click on it to select it.

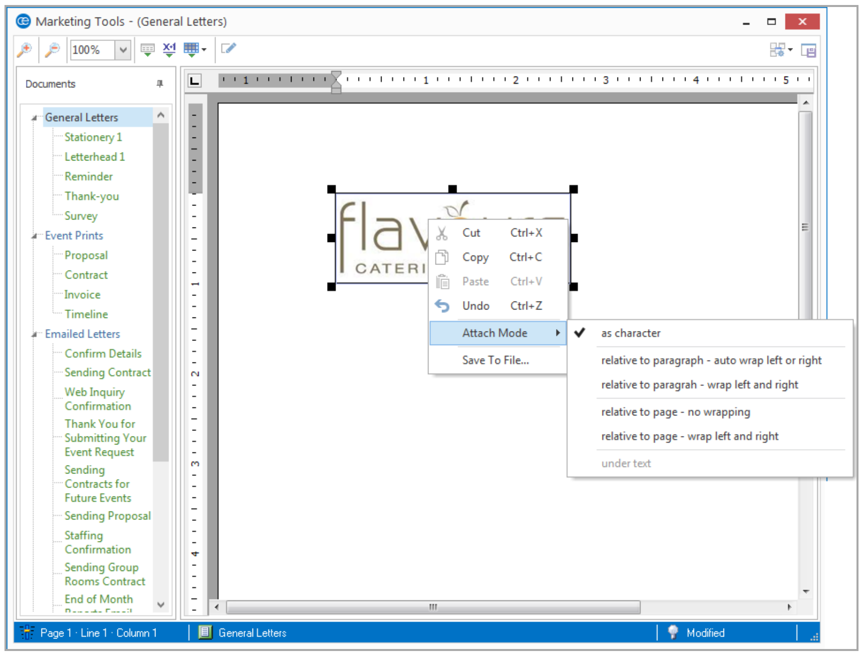
6. Click **Open**.
   Result: *The selected image is placed in the document wherever your cursor is positioned.*
   Note: *As an option, you can double-click the image to select it.*

Changing an Image's Attach Mode

When you insert an image into a document, it is automatically inserted as if it were a character in the document. Therefore, it moves with all the other text as you make changes, and responds to the same formatting tools (left/center/right justification, etc.). As an option, you can change the way an image is attached, and thereby cause text to wrap around it on one side or the other (or both sides), or you can even place an image behind the document's text (in the case of a watermark).

1. Right-click on an image in your Marketing Tools document.
   Result: *A pop-up menu opens.*

2. Select **Attach Mode**.



3. Choose from the following options:

   - **As Character**
     This is the default mode, where the image acts as any other character in the document and moves and wraps with the text around it.

   - **Relative to Paragraph - Auto Wrap Left or Right**
     Attaches the image to a paragraph. Drag the image to any paragraph, and drag it left or right on the screen. If the image is closer to the right-hand side of the page, text will wrap to its left (and vice versa).

- **Relative to Paragraph - Auto Wrap Left AND Right**
  Attaches the image to a paragraph. Drag the image to any paragraph, and drag it left or right on the screen. Text will automatically wrap on both sides of the image.

- **Relative to Page - No Wrapping**
  Attaches the image to the page. You can drag the image to any position you want. Text will not wrap.
  Note: *Use this mode with a faded image to create a watermark effect. (You'll want to choose the "Under Text" option, described below).*

- **Relative to Page - Wrap Left and Right**
  Attaches the image to the page. You can drag the image to any position you want, and text will automatically wrap on both sides as necessary.

- **Under Text**
  Places the image behind text on the page as you drag it. Use this in conjunction with "Relative to Page - No Wrapping" (described above) to create a watermark effect.

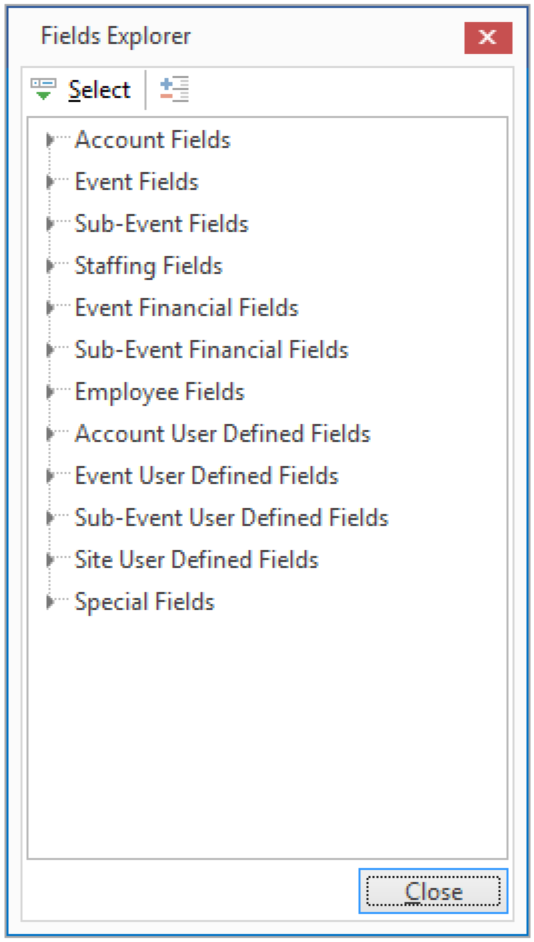
Using Formatted Date Fields

Formatted date fields allow you to have the merge document display date fields that the program will automatically calculate based on parameters you set via the symbols outlined below; for example, ten days from the CURRENT date or two days before the EVENT date, whenever you print the document. In addition, you can format these fields in a variety of day/month/year styles.

Inserting and Customizing Formatted Date Fields

1. Click into the Marketing Tools document to place your cursor where you want the merge field to be inserted.

2. Click the **Insert Merge Fields** button , located at the top left-hand side of your Marketing Tools window.
   Result: *The Fields Explorer window opens.*



Tip: *If you plan to insert several merge fields, you may want to leave this window open and drag it out of the way so you can see your print underneath.*

3. Click the expand button (triangle) to the left of a particular category of fields (e.g., Event Fields, Financial Fields, etc).
   Result: *The selected category opens to show all related fields.*

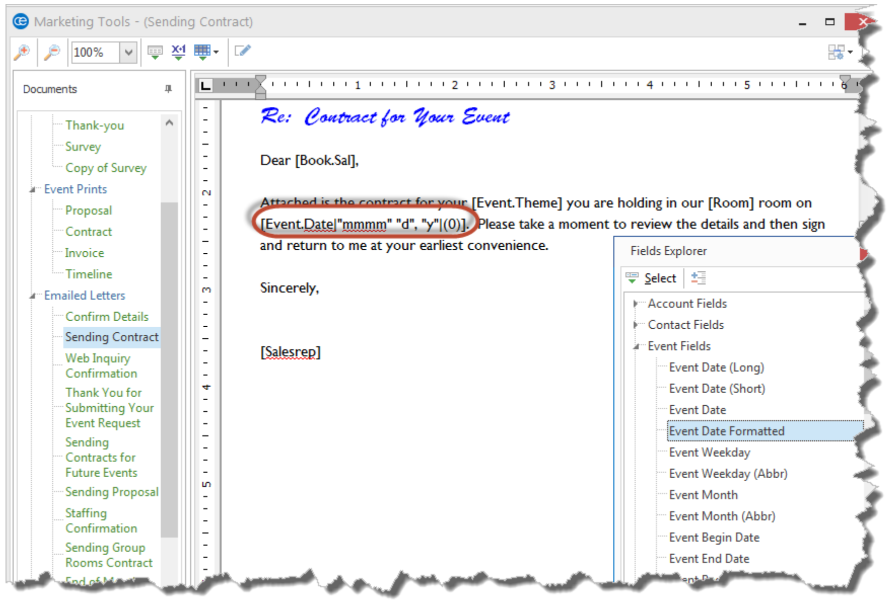
   Note: *As an option, click the* ***Full Expand*** *button*  to expand all categories of merge fields at once.

4. Select a **Formatted** field, and insert it in one of the following ways:

   - Double-click the selected field to drop it in the current cursor position (where your cursor currently resides).

   - Hold your left mouse button down on the field, drag it into any position on your letter, envelope, or comments section, and release.

- Click the **Select** button to drop the field in the current cursor position.



5. Format the date field by editing the "mmmm," "d," "y," and number within the brackets, using the options listed in the table below.

Formatted Date Fields Table

Symbol	Description
d	Displays the day as a number without a leading zero (1-31).
dd	Displays the day as a number with a leading zero (01-31).
ddd	Displays the date as an abbreviation (Sun-Sat).
dddd	Displays the day as a full name (Sunday-Saturday).
m	Displays the month as a number without a leading zero (1-12).
mm	Displays the month as a number with a leading zero (01-12).
mmm	Displays the month as an abbreviation (Jan-Dec).
mmmm	Displays the month as a full name (January-December).
y	Displays the year as a four-digit number.
+	Adds days to the applicable merge date.
-	Subtracts days from the applicable merge date.

Using the Basic Text Editing Tools

Caterease offers full rich-text formatting in text boxes throughout the program. Notes and comments areas exist for event, clients, menu items, reminders, history notes, even in various areas on your custom event prints. Any of this text can be customized with font style, color, size, bold, underline, italic, etc.

Formatting Text in the Program

1. Click inside the document you are working on.
2. Highlight the text you want to format.
3. Click the **Home** ribbon tab, located at the top of the screen, if it is not already selected.
4. Click into the **Basic Text Editing** group and edit your text in any of the following ways:

Formatting Tools Table

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

Unit 2: Creating Headers and Footers in a Document

You can establish different headers and/or footers for the various pages of your merge documents, containing images (perhaps your logo), text, merge fields, tables, etc. These headers and footers can also be designated to appear on specific pages, so you can create multiple headers and footers for a particular document.

Objectives:

Upon completing this unit, you will be able to:

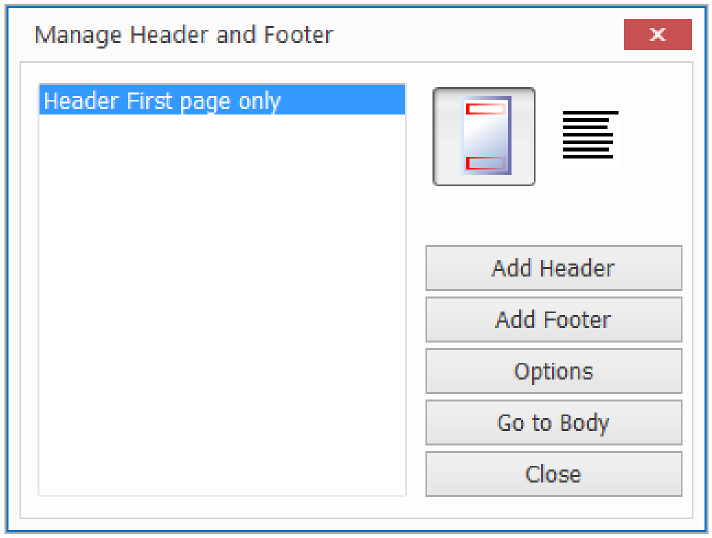
- *Create headers and footers.*
- *Insert a table into a merge document.*
- *Color row, column, or text background.*
- *Insert a hyperlink.*
- *Insert a page break.*
- *Add or delete table columns or rows.*
- *Adjust the page margins of a document.*
- *Set a different paper color.*

Adding a Header or Footer

__Tip:__ "Page Number" and "Page Count" (for example, "Page 1 of 4") or "Current Date & Time" can be inserted into a header/footer by clicking the __Insert__ button in the __Home__ ribbon tab at the top of the screen.

1. Click the **Setup** sidebar, located on the left-hand side of the screen, and click **Marketing Tools**.
   Result: *The Marketing Tools window opens.*
   Note: *As an option, you can click the **Select** ribbon tab at the top of the screen and choose **Prints > Marketing Tools**.*
2. Select a document from the title list in the left-hand pane of the window.
3. Click anywhere inside the document you selected.
4. Click the **Setup** button, located in the **Home** ribbon tab at the top of your screen, and choose **Headers & Footers**.

Result: *The Manage Header and Footer window opens.*



5. Click **Add Header** or **Add Footer**.

6. Choose which pages should include the new header/footer.
Result: *The header/footer is added to the document, and your cursor is placed inside it.*
Note: *If adding a header/footer that will not display on the current document page (i.e., "Not on first page," "Even pages only," etc.), your cursor will be moved from the current page to that header/footer until you finish editing it.*

7. Type header/footer text and format as desired.

8. **[Optional]** Move from one header/footer to another by clicking the specific header/footer in the list on the left side (large white pane) of this window.

9. **[Optional]** Switch from headers and footers to body text by clicking **Go to Body**.

10. When finished editing headers/footers, click **Close**.

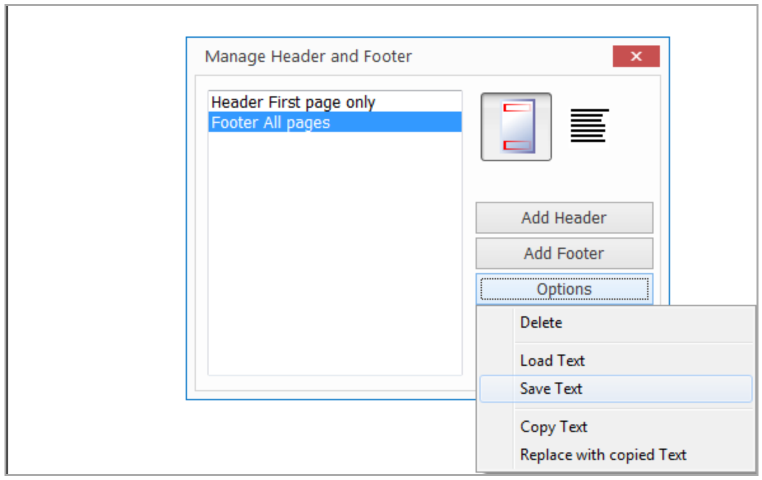
Saving a Header or Footer to Use in Another Document

Tip: *As an alternative, you can choose **Copy Text** in Step 3, above, to copy the header/footer contents for immediate pasting in another document.*

1. Click the **Setup** button, located in the **Home** ribbon tab at the top of your screen, and choose **Headers & Footers**.
Result: *The Manage Header and Footer window opens.*

2. Click on the left-hand side of the Manage Header and Footer window to

select the header or footer you want to save.



3. Click the **Options** button and select **Save Text**.
   Result: *A Windows browse window opens.*

4. Type a name for the file you want to save.

5. Click **Save**.
   Result: *The contents of the selected header or footer are saved as an .rtf file.*
   Note: *You can click the down arrow next to **Save As Type** at the bottom of the window to save as another file type.*

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

Loading a Previously Saved Header or Footer

Tip: *As an alternative, you can choose **Replace with Copied Text** in Step 3, above, to paste recently copied header/footer contents.*

1. Click the **Setup** button, located in the **Home** ribbon tab at the top of your screen, and choose **Headers & Footers**.
   Result: *The Manager Header and Footer window opens.*

2. Click on the left-hand side of the Manage Header and Footer window to select the header or footer you want to load previously saved text into.
   Note: *See "Adding a Header or Footer," above, for information about creating a new header or footer.*

3. Click the **Options** button and choose **Load Text**.
   Result: *A Windows browse window opens.*

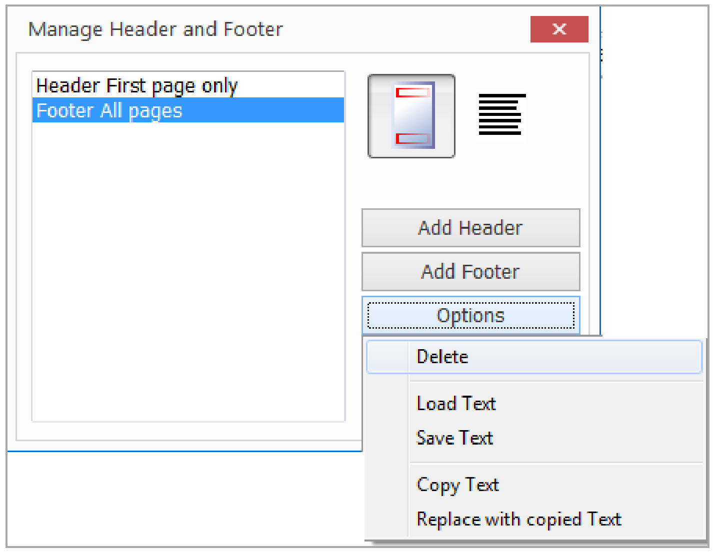
4. Browse to the file you have previously saved.

5. Click **Open**.
   Result: *The contents of the previously saved file appear in the header/footer.*

6. Click Close to close the Manage Header and Footer window.

Deleting a Header or Footer

1. Click the **Setup** button in the **Home** ribbon tab at the top of the screen and choose **Headers & Footers**.
   Result: *The Manage Header and Footer window opens.*



2. Click on the left-hand side of the Manage Header and Footer window to select the header or footer you want to delete.

3. Click the **Options** button and select **Delete**.
   Result: *The selected header/footer is immediately removed from the list as well as from the document.*

4. Click **Close** to close the window.

Inserting Hyperlinks, Page Breaks and Page Number/Count

Inserting a Hyperlink into a Document

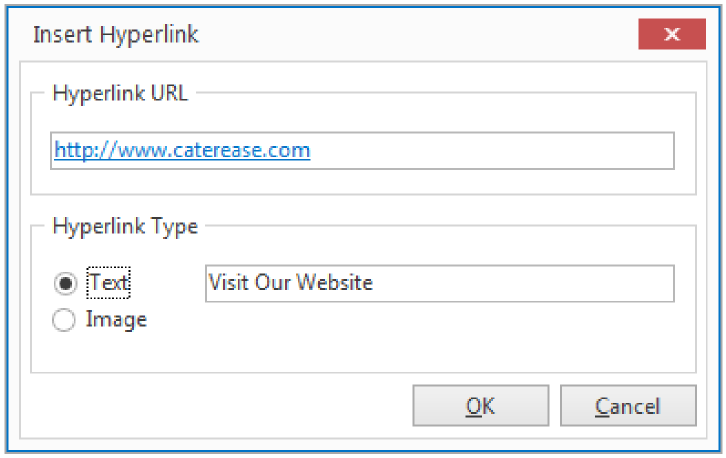
Often, especially in the case of e-mail letter templates, you might want to insert hyperlinks into the body of a merge document. Of course, you can simply type the hyperlink and the program will automatically recognize the format of a web or e-mail address. Alternatively, you can use custom text as a hyperlink in the following way:

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

2. Select a document from the Documents list in the left-hand pane of the screen.

3. Click into the document where you would like the hyperlink to be inserted.

4. Click the **Insert** button , located in the **Home** ribbon tab at the top of your screen, and choose **Hyperlink**. (You may also right-click anywhere within your document and choose **Insert** > **Hyperlink**.)
   Result: *The Insert Hyperlink window opens.*

5. Enter a web address (URL) in the Hyperlink URL field of the window.
   Note: *You can copy a URL from your browser BEFORE Step 4, above, and it will default as the Hyperlink address in this window.*

6. Enter text in the Text field at the bottom of the window to serve as the actual hyperlink in your document OR click the **Image** radio button if you would like to use an image as a hyperlink.
   Note: *This window saves the settings from the previous time you used it. Thus, text may default from the most recent time you inserted a hyperlink - OR the **Image** radio button may be selected by default (or both).*

7. Click **OK**.
   Result: *The text you entered is inserted into the document as a hyperlink. If inserting an image, a Windows browse window opens, allowing you to search for and select the desired image.*

8. **[Optional]** Format the hyperlink text in the document using the font formatting tools in the **Basic Text Editing** section, located in the **Home** ribbon tab at the top of your screen.

Inserting a Page Break or Page Number/Count

Perhaps you want certain information on a custom print to appear on a separate page. For example, maybe you would like your appetizer items to appear on a separate page from your entrees, or perhaps you want a special page at the end of a print for terms and conditions. In these cases, you can simply insert a page break into the custom print.

1. Click into the document where you would like the page break or page number/count to be inserted.

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

3. Choose **Page Break**, **Page Number,** or **Page Count**. (You may also right-click anywhere within your document and choose **Insert > Page Break (**or **Page Number** or **Page Count).**
   Result: *The item is inserted.*
   Note: *If inserting a page break, your cursor moves to the next page. If inserting a page number or count, the appropriate number will display where your cursor was positioned when you inserted the page number or page count. (This number will automatically change as you continue to add or remove pages to your document.)*

Adjusting Page Size, Margins and Orientation

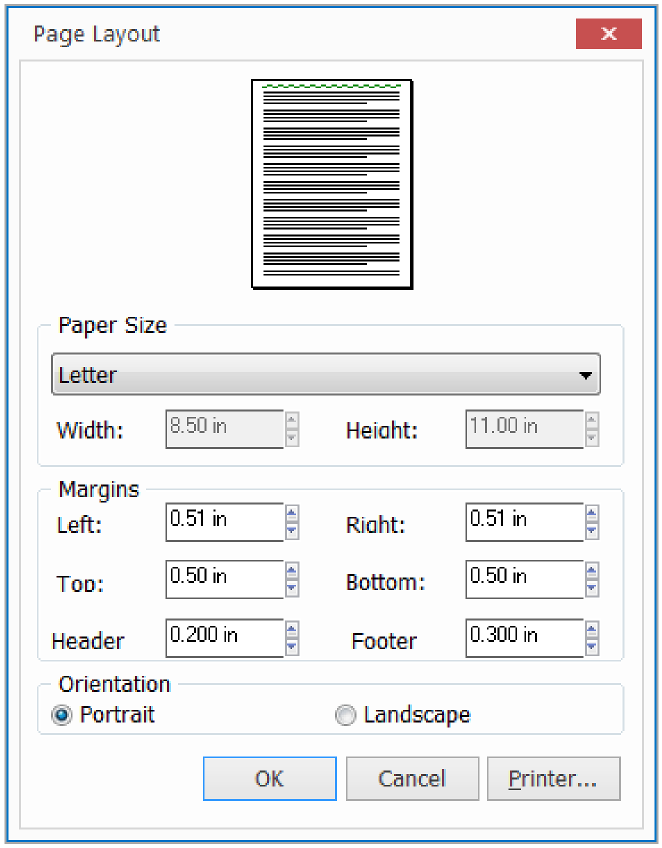
You can change the paper size of a document, perhaps choosing legal-sized paper rather than the default letter-sized paper. You can also adjust the margins of your document, and can easily switch between Landscape and Portrait orientation.

Adjusting Page Setup

1. In the Documents pane of the Marketing Tools window, select the title of the document you want to adjust.

2. Click anywhere inside the document you are working on.

3. Click the **Setup** button, located towards the middle of the **Home** ribbon tab, and choose **Page Setup**.
   Result: *The Page Layout window opens.*



4. Make adjustments to the page setup in any of the following ways:

   - Click the down arrow under **Paper Size** and select the appropriate paper size ("Letter,""Legal," etc.), from the drop-down list.
     Note: *To create a standard business envelope, choose an "Envelope" from the drop-down list and click the* ***Landscape*** *radio button.*

   - Edit margins as desired by typing Left / Right / Top /Bottom dimensions into the appropriate fields.

   - Change paper orientation by clicking the radio button labeled **Portrait** or **Landscape**.

5. When finished, click **OK**.
   Result: *The window closes and the changes are applied to your document.*

Setting a New Paper Color in Marketing Tools

Documents created in Marketing Tools can have any paper color, to serve as the default background color for all pages of the document, in prints and documents that are exported to PDF.

Setting a Different Paper Color in Marketing Tools

> ***Tip:*** *If you insert an image into your document, any transparent background color will appear as white; you will therefore need to create an image with the appropriate background color that matches your document's paper color.*

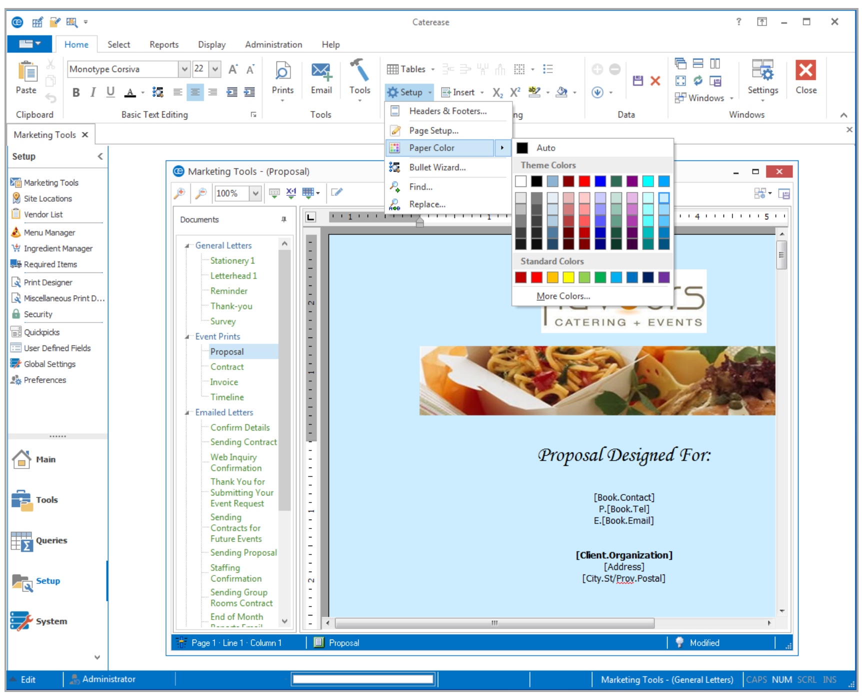
1. In the Documents pane, located on the left-hand side of your Marketing Tools window, select the title of the document you want to change the color of.

2. Click anywhere inside your document.

3. Click the **Setup** button, located in the **Home** ribbon tab at the top of your screen, and choose **Paper Color**.
   Result: *A pop-up color palette displays.*

4. Click on the desired color within the color palette or click the **More Colors** button to select a custom color.
   Note: *Click the* ***Add to Custom Colors*** *button after selecting your custom color from the color spectrum.*

5. Click the **Save** button, located in the **Home** ribbon tab at the top of your screen, to save your changes.



Unit 3: Using Merge Tables to Insert Menu Items, Payments, Etc.

In addition to inserting merge fields into a document, you can use "merge tables" to insert entire groups of information - such as menu items, staffing, details of multiple sub-events and more. You can even "nest" these merge tables in the cells of other tables to arrange them neatly on the left- or right-hand side of a document.

Inserting a Merge Table into a Document

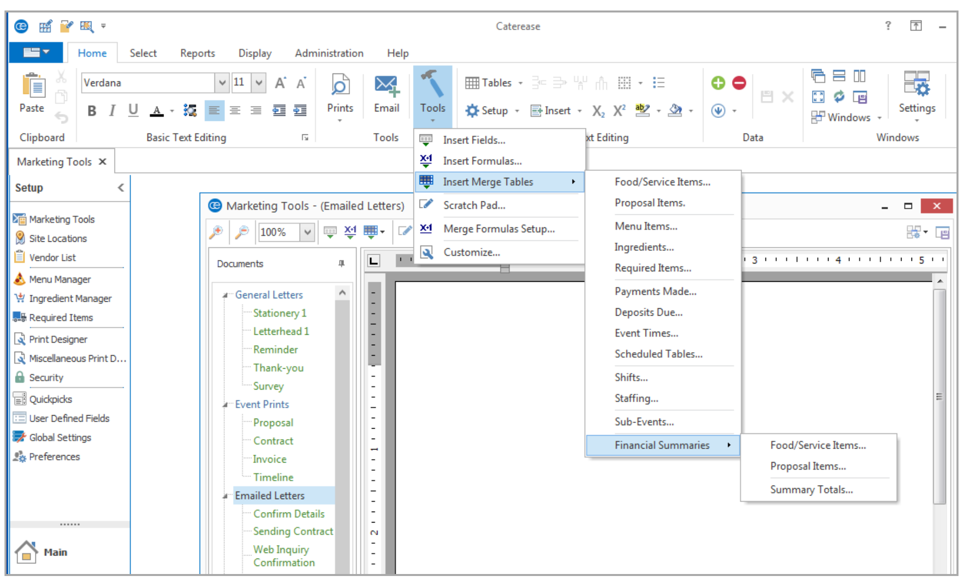
> ***Tip:*** *Merge tables can be edited after they have been created - inserting additional fields, editing filter rules, etc. See "Editing an Existing Merge Table."*

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

2. Select a document from the Documents pane, located on the left-hand side of your screen.

3. Click into the document where you would like the merge table to be inserted.

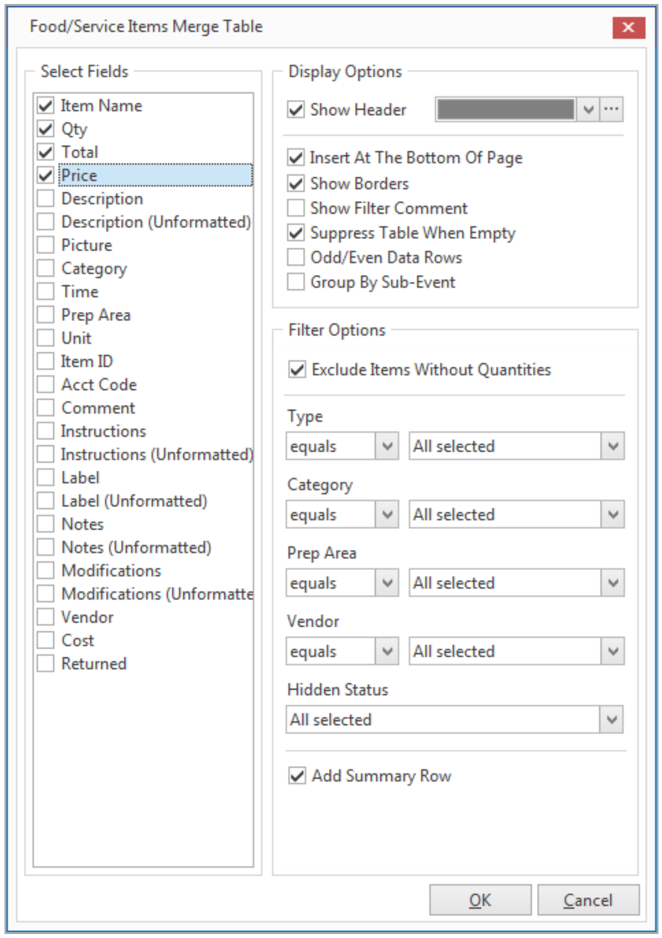
4. Click the **Tools** button, located at the top of your screen, and choose **Insert Merge Tables.**
   Result: *A list of available merge table options displays.*
   Note: *The settings on this window (field selections, options, and filters - discussed below) default from the previous merge table you have created of this type.*



Available Merge Tables

Merge Table	Description
Food/Service Items	Insert all menu items for the event, or choose to insert groups of menu items based on item Type, Category, Prep Area, Vendor, or Hidden Status.
Proposal Items	Insert all menu items selected for a proposal in Prospect Manager or optionally separate them based on item Type, Category, Prep Area, Vendor, or Hidden Status.
Menu Items	Insert all menu items listed in your default menus in Menu Manager, or optionally separate them based on the menu they are in, or item Type, Category, or Prep Area.
Ingredients	This merge table produces a summary of similar ingredients, in which all event ingredients have the same Item Name, Unit, Prep Area, Category, Vendor, Comment, and Conversion.
Required Items	Insert a summary of similar required items, in which all event required items have the same Item Name, Unit, Category, Vendor, and Comment.
Payments Made	Insert all payments made for the event, or choose to insert only payments of a particular payment method.
Deposits Due	Insert all future deposits due for this event, or choose to insert only those deposits that have been paid or that remain unpaid.
Event Times	Insert all Event times and timeline items for the event, or separate them based on Category or Type.
Scheduled Items	Insert all Scheduled Items for the event, or separate them based on Category or Type. ("Items" can be changed to Tables, Lanes, etc.
Shifts	Insert all shifts scheduled for an event, or choose to insert groups of shifts based on Position or Shift Category.
Staffing	Insert all employees scheduled to work an event, or choose to insert groups of staff based on Position, Staff Category, or whether they have confirmed they will work the event.
Sub-Events	Insert details from all sub-events, including times and venue details - or choose to insert groups of sub-events based on sub-event Description or Type.
Financial Summaries	Insert summary totals of groups of menu items based on item Type or Category, or general event financial totals such as the event Subtotal, Tax, Service Charge, Gratuity, Total, Cost, Profit, etc.

5. Under **Select Fields** (the large white pane on the left side of the window), check into the boxes next to any details you want to include in the document. ***Note:*** *"Unformatted" fields (Food/Service Item Descriptions, Sub-Event Comments, Sub-Event Site Directions) merge in text only without formatting, and inherit the rich-text formatting you apply here in the document.*



6. **[Optional]** Hold your left mouse button down on any field you have selected in the **Select Fields** pane, located on the left-hand side of the window (above) and drag that field up or down in the list, to rearrange the order fields will appear in the print.

7. Under **Display Options** on the right-hand side of the window, select any or all of the following options:

   - **Show Header**
     Shows a header row across the top of the table, labeling each column you have chosen to include ("Description," "Price," "Qty," etc.).
     Note: *Optionally apply a background color to the header row using the color palette to the right.*

   - **Insert at Bottom of Page**
     Inserts the table at the bottom-most line of your document, regardless of where your cursor currently resides.
     Note: *This may not necessarily be the bottom of the page; it's the lowest "carriage return" spot.*

- **Show Borders**
  Choose to show borders around each cell of the merge table - between each row and column.

- **Show Filter Comment**
  Displays a comment below the merge table describing the specific filter you apply to this table (see topic below).
  Note: *This comment will not print on the final document; it is visible in this design mode only.*

- **Suppress Table When Empty**
  Suppresses the table from the printed document when it is empty - meaning, no empty table or blank space will display when there are no items to merge.

- **Odd/Even Data Rows**
  Displays data in Odd Row/Even Row format, in order to neatly separate/organize the displayed data.

- **Group By Sub-Event (Food/Service Items, Shifts and Staffing Only)**
  When printed for an event with multiple sub-events, items in this table will be separated based on the sub-event they belong to.

8. Under **Filter Options** on the lower right-hand side of the window, determine which specific items to include in this table as described under "Merge Table Filter Options" at the bottom of this topic.

Editing an Existing Merge Table

Once you have inserted a merge table into a document, you can make changes to it, such as adding or deleting rows or columns, or splitting or merging table cells, using the tools discussed in the previous unit. Furthermore, you can easily make additional changes specific to that particular type of merge table, adding fields or even editing the table's filter, without having to re-create the entire table.

1. From a document in Marketing Tools, right-click into the merge table you want to edit.
2. Choose **Merge Tables**.
3. Select one of the following options:

   - **Available Fields**
     Offers a list of merge fields, specific to this type of table, which can be inserted anywhere in the table.
     Note: *You can insert fields in the same cells as other fields, and even type between them, for example, inserting the "Start" time, then a dash, then the "End" time.*

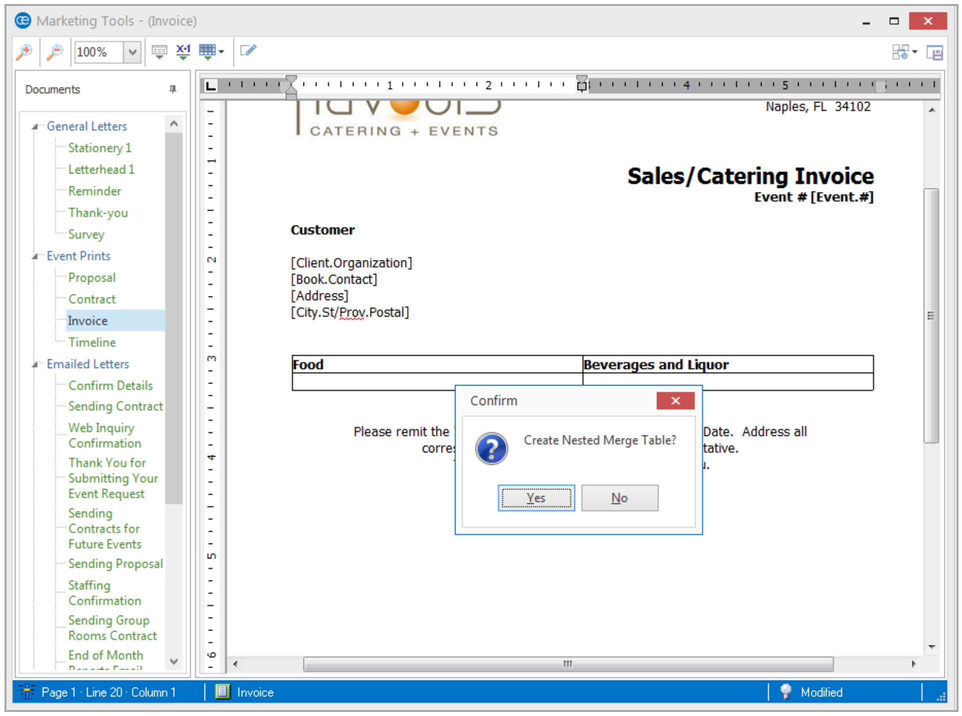
- **Display Filter**
  Shows the current filter applied to this table.
- **Edit Filter**
  Displays a window giving the filter options for this type of table, so you can edit the current filter.

Using Nested Tables to Arrange Information in a Document

You can control the layout of a particular merge document using tables within tables, or “nested” tables. For example, imagine you want to design a contract that shows food items on the left side of the print and beverage items on the right. You can accomplish this by creating a standard, two-column table to split the page in half, and then inserting one merge table (for food items) in the left column and a second merge table (for beverage items) in the column on the right.

1. Click into the document where you would like the nested tables to be inserted.
2. Click the **Tables** button, located in the **Home** ribbon tab at the top of your screen, and choose **Create Table**.
   Result: *The Insert Table window opens.*
3. Enter properties (number of rows/columns, borders, etc.), for a new table, and click **OK**.
   Result: *The table is inserted into the document at the current cursor location.*
   Important: *Most often, tables used for nesting do not contain borders; they serve as "invisible" ways to split the printed page. If you include borders here, refer to the important note on the following page regarding how to remove them after you have nested tables.*
4. Click into a particular cell (left, right, first row, second row, etc.), of the new table.
5. Click the **Tools** button, located in the Home ribbon tab at the top of your screen, and choose **Insert Merge Tables.**

Result: *A list of available merge table options displays.*



6. Choose a specific type of merge table (Food/Service Items, Payments, Deposits, etc.), to insert.
   Result: *A confirmation message appears, informing you that you are inserting a "nested" merge table.*

7. Click **Yes** to confirm.
   Result: *The Merge Table window opens.*

8. Establish merge table settings as explained in topics above.
   Important: *Be sure the merge table option **Insert at the Bottom of Page** is unchecked to properly nest the table.*

IMPORTANT: If you want to remove borders from the original table you added in Steps 4 & 5 above AFTER you have nested other tables, here's how to accomplish that:

1. Click BELOW the table and hold your left mouse button down.
2. Drag to a point ABOVE the table to highlight the original table (this will include the nested tables within).
3. Click the **Switch Borders Off** button, located in the **Extended Text Editing** area in the **Home** ribbon tab.
Result: *This may remove all borders, including those in the nested table; you may therefore want to highlight individual nested tables and switch borders back on as desired.*

Using Tables in Merge Documents

You can use tables in your merge documents to arrange information neatly in columns and rows. Tables can even be included without borders, allowing you to separate information cleanly into various areas of the page. You can even combine this option with the use of Nested Merge Tables (tables within tables) for purposes such as putting certain menu items on the left-hand side of the page and others on the right.

Inserting a Table into a Document

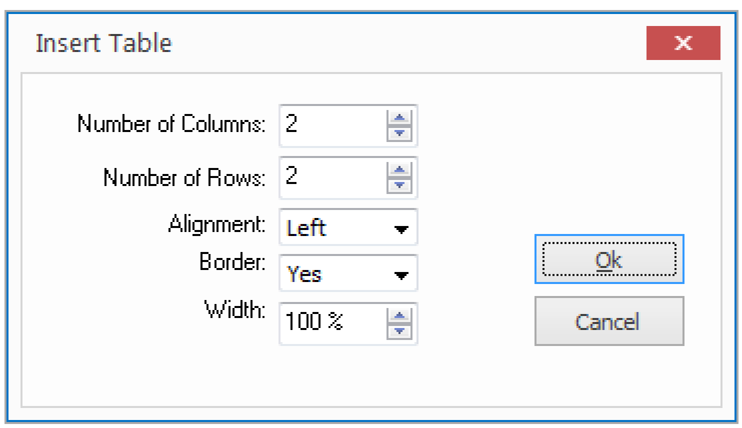
Tip: *As an alternative, you can use the Create Table tool to "draw" a table by dragging over the desired number of columns and rows.*

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

2. Select a document from the Documents list on the left-hand pane of the window.

3. Click into the document where you would like the table to be inserted.

4. Click the **Tables** button, located in the **Home** ribbon tab at the top of your screen, and choose **Create Table**.
   Result: *The Insert Table window opens.*



5. Create a table by setting the following options:

   - **Number of Columns**
     Set the number of columns you want to include in your table.
     Note: *Additional columns and rows can be added later, if necessary.*

   - **Number of Rows**
     Set the number of rows you want to include in your table.

- **Alignment**
  Select whether you want the table to appear on the left side of the page, in the center, or on the right.
  Note: *If the width of your table is 100% (see "Width," below), then the table will take up the entire width of the page.*

- **Border**
  Choose whether or not you want borders around the cells of your table.
  Note: *Borders can be removed after the table has been inserted, if necessary.*

- **Width**
  Set the width for your table as a percentage of the page you are placing it on.

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

Modifying a Table

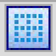
1. Click into a cell or highlight multiple cells of a table.

2. Select from the options described below, which are available in the **Extended Text Editing** group on the **Home** ribbon tab at the top of your screen:

Symbol	Description
	Split Cell: (Found by clicking the **Tables** button) Splits the cell or cells you have highlighted in half (i.e., splits each individual cell into two).
	Combine Cells: (Found by clicking the **Tables** button) Combines the currently highlighted cells into one cell. Note: To use, first highlight two or more cells in the table.
	Insert Row: Inserts a row below the current cursor position.
	Delete Row: Deletes the row where the cursor currently resides.
	Insert Column: Inserts a column to the right of the current cursor position.
	Delete Column: Deletes the column where the cursor currently resides.

3. The following options are found by clicking the **Borders** button :

Symbol	Description
	Left Borders: Adds borders to the left-hand side of the currently highlighted cell(s).
	Right Borders: Adds borders to the right-hand side of the currently highlighted cell(s).
	Top Borders: Adds borders across the top of the currently highlighted cell (s).
	Bottom Borders: Adds borders across the bottom of the currently highlighted cell(s).
	Switch Borders On: Adds borders to all sides of the currently highlighted cell(s).

Symbol	Description
	**Switch Borders Off:** Removes all borders from the currently highlighted cell(s).
	**Inner Borders:** Adds inside borders (vertical and/or horizontal) to the currently highlighted cell(s).
	**Outer Borders:** Adds borders to the outside edges of the currently highlighted cell(s).

Deleting a Table

1. Click anywhere within a table to place your cursor in that table.
2. Hold your left mouse button down and drag over the entire table to select it.
3. Press the **[Delete]** key on your keyboard (or click the **Tables** button and choose **Delete**).
   Result: *The highlighted table is deleted, without confirmation.*
   Note: *If you accidentally delete a table, you can click the* ***Undo*** *button at the top left-hand side of your Caterease screen.*

Coloring Row, Column, or Text Background

You can customize the coloring and textures of all row, column, or text background. Doing so will give your Marketing Tools document a uniquely formatted style that may only be achieved when you use Caterease software.

Adding Color to a Table’s Row, Column, or Cell

1. Click inside the table’s cell (or highlight an entire row or column).
2. Click the **Shading** button , located in the **Extended Text Editing** group on the **Home** ribbon tab at the top of the screen.
3. Choose a background color or optionally click **More Colors** to define a custom color.
   Result: *The background color of the selected cell, row, or column, will be changed.*
   Note: *The background color of any text in these cells will remain white, and must be changed separately, as described below.*

Adding Background Color to Text

1. Highlight the desired text in one of your Marketing Tools documents.
2. Click the **Text Highlight Color** button , located in the **Extended Text Editing** group on the **Home** ribbon tab at the top of the screen.

3. Choose a background color or optionally click **More Colors** to define a custom color.
   Result: *The background color of the selected text will be changed.*

Using Merge Formulas in Documents

Perhaps there is some detail you want to include in a merge document, but that detail will vary depending on a particular condition. For example, maybe you would like to include some payment terms on the print, and those terms will vary depending upon how many days out the event is. Or perhaps you want to include a brief biographical paragraph about the event's sales rep, which will obviously need to change, depending on which rep is responsible for the party your print is associated with. The incredible Merge Formula feature lets you create unlimited text, including merge fields that will dynamically change based on the conditions you establish.

Creating a New Merge Formula

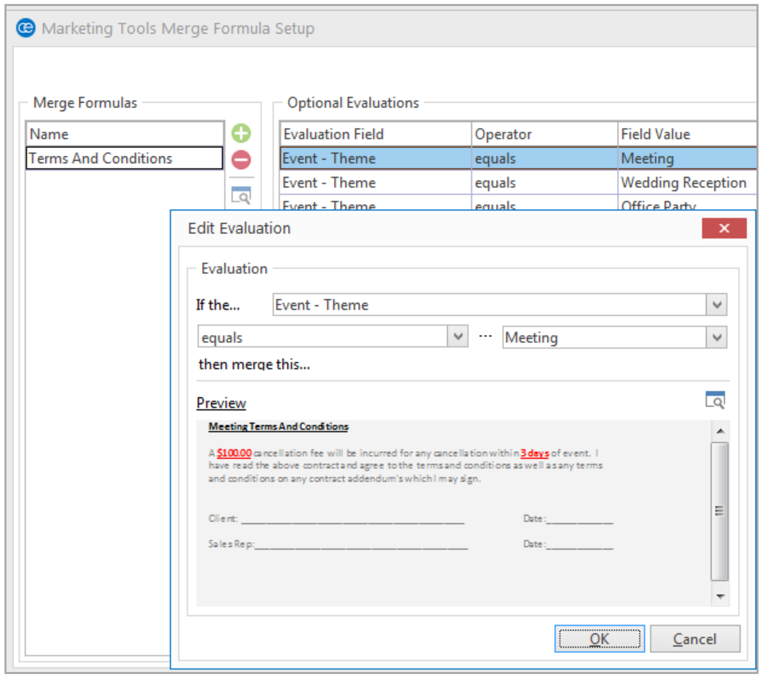
1. Click the **Setup** sidebar, located on the left-hand side of your screen, and choose **Marketing Tools**.
   Result: *The Marketing Tools window opens.*
   Note: *As an option, you can click the **Administration** ribbon tab at the top of the screen and choose **Prints > Marketing Tools**.*

2. Click anywhere inside the Marketing Tools document you want to create a merge formula for.

3. Click the **Tools** button, located at the top of your screen, and choose **Merge Formulas Setup** from the list of options.
   Results: *The Marketing Tools Merge Formulas Setup window opens.*

4. Click the **Add Formula** button , located on the left pane of the window.
   Result: *The Edit Formula window opens.*
   Note: *This button is identical to the **Add Evaluation** button on the right-hand side of the window; be careful not to confuse them.*

5. Enter a name for your new formula (e.g.,"Special Terms," "Sales Rep Bio," etc.) into the Name field.



6. Click the **View/Edit Default Value** button  at the middle right of the Edit Formula window.
   Result: *The Formula Default Value text box opens.*

7. Enter the text this formula is to display as a default.
   Note: *You are going to be establishing conditions for this formula - meaning, you'll be saying "if the event meets this condition, then print this text instead." Thus, this default text is what will appear on the print if none of your conditions apply. (For example, you may establish default terms for an invoice. Then you might apply a condition that says, "if the event date has past, print these terms instead. Then, you may add further conditions - such as, "if the event is over 30 days past, print these terms," etc.).*

8. **[Optional]** Insert dynamic merge fields into your default text by placing your cursor where you want a merge field to appear, clicking the **Fields** button at the top right of the text box and double-clicking the desired merge field.
   Note: *Merge fields are organized into categories on the Fields Explorer window.*

9. **[Optional]** Insert images into your default text by placing your cursor where you want an image to appear, clicking your right mouse button and choosing **Insert > Image**.
   Note: *You can insert hyperlinks in this manner, as well.*

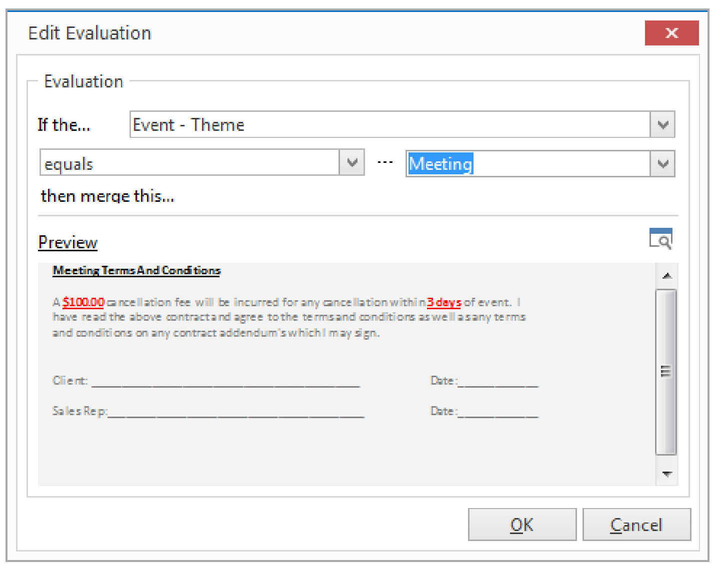
10. When finished, close the Formula Default Value text box.

11. **[Optional]** Un-check the **Use Formatted Text When Merging** checkbox if you want the rich-text formatting of your merge document to override any formatting you applied to your default text.

12. Click **OK** to close the Edit Formula window.

Creating Conditions for a Merge Formula

1. In the Marketing Tools Merge Formula Setup window, click the **Add Evaluation** button , located on the right-hand side of the window.
Result: *The Edit Evaluation window opens.*
Note: *If you have closed the Merge Formula Setup window down, click* ***Tools > Merge Formulas Setup*** *and select the formula you want to edit on the left-hand side of the window.*



2. Click the down arrow to the right of the first field on the window (next to the words "If the ...").
Result: *A drop-down list of choices appears.*

3. Select the specific field you want to base this condition on.
Note: *For example, if you want the merge formula text to vary depending on the date of the party, select "Event Date."*

4. Click the down arrow to the right of the second field on the window (the default value is "Equals").
Result: *A list of choices appears.*

5. Choose the appropriate comparison term.
   Note: *Choices include "equals," "does not equal," "is greater than," etc.; date fields add the options of "within the next 7 days," "over 30 days past," etc.*

6. Click the down arrow to the right of the third field on the window and choose the desired value.
   Note: *This list will be the specific quickpick list related to the field you selected in Step 3, above. In cases where no quickpick list applies (dates, numbers), you will have access to a drop-down calendar or you can simply type directly into the field. (This field is disabled when such comparisons as "within next 7 days," "over 30 days past," etc., are selected in Step 5, above.)*

7. Click the **View/Edit Evaluation Result** button , located in the middle of the window.
   Result: *The Formula Results Value window opens.*

8. Enter the text for this formula to display if the condition you're creating is true, using the tools discussed in "Creating a New Merge Formula," above.
   Note: *This is the text that will appear on your printed document if this condition is true. If this condition is not true, other conditions will be evaluated (if applicable). If all conditions are false, the default text you established in "Creating a New Merge Formula," above, will appear on the printed document.*

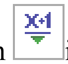
9. When finished, close the Formula Results Value window and click **OK** to close the Edit Evaluation window.

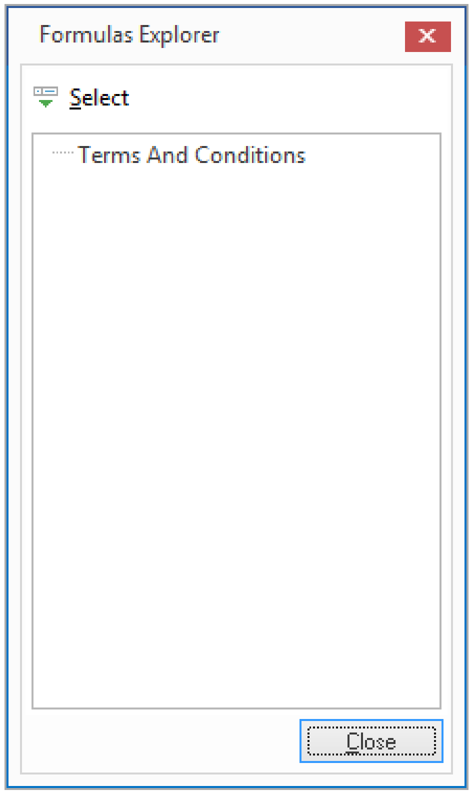
10. Repeat Steps 1-9 above to create additional conditions as desired.

> **IMPORTANT:** Conditions are evaluated in the order in which they are listed under Optional Evaluations on the Marketing Tools Merge Formula Setup window. Therefore, be careful to drag and drop them up and down on that list according to priority. For example, imagine your first condition says "Event date is past" and your second condition says "Event Date is over 30 days past." When printing for a past event, the print will evaluate the first condition as true - the event date IS INDEED in the past - and will print the text called for by that condition. It will NEVER evaluate the second condition to see if the event date is 30 days past, because it will stop once the first condition is proved true.

Inserting a Merge Formula into a Document

1. Click into the Marketing Tools document where you want the merge formula to appear.

2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your screen, and choose **Insert Merge Formulas.**(This button  is also available on the upper left-hand side of your Marketing Tools window.)
   Result: *The Formulas Explorer window opens.*



3. Double-click the specific merge formula you want to insert.
   Result: *The formula is inserted at the position where your cursor resides.*

4. When finished, click **Close** to close the Formulas Explorer window.

Printing and Emailing Merge Documents

Unit 4: Printing and Emailing Merge Documents

Once you have created your merge documents in your Marketing Tools package, you can quickly print them for a particular event in your Event Manager. Like your other event prints, these merge documents will merge in the specific details of the event you are on when you print them.

Objectives:

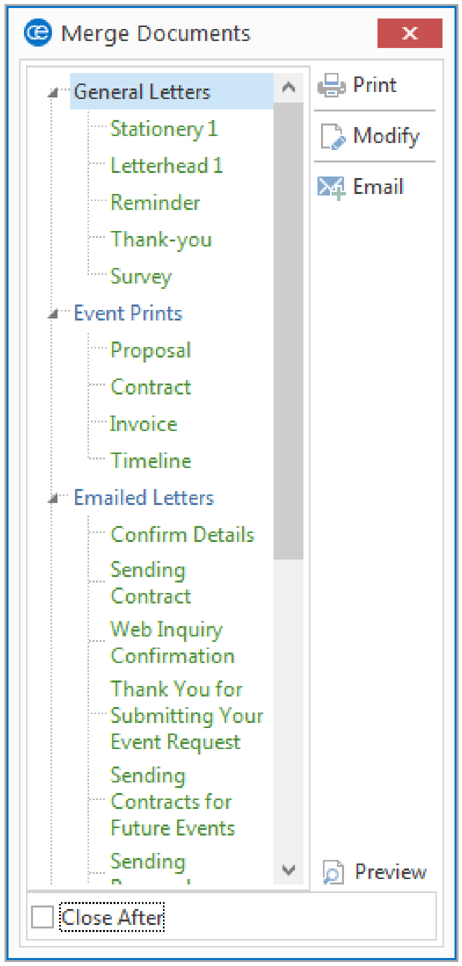
Upon completing this unit, you will be able to:

- *Print a merge document for an individual event.*
- *Make a one-time only change to a document prior to printing.*
- *E-mail a merge document.*
- *Use a merge document as the body of an outgoing e-mail message.*
- *Print documents for a batch of events at one time.*
- *Print a merge document from Account Manager.*

Printing a Merge Document

1. Click the **Home** ribbon tab at the top of your Event Manager screen, if it is not already selected.

2. Click the **Merge Documents** button , located on the lower left-hand side of your screen. (This button can also be accessed from the **Tools** menu at the top of your screen.)
   Result: *The Merge Documents window opens.*



3. Click one of the titles on the list to select that print
4. On the right-hand side of the Merge Documents window, click one of the following buttons:
   - **Print**
     Generates a print preview of the selected document.
   - **Modify**
     Displays the document already merged in a window that allows one-time editing prior to printing.
   - **Email**
     Displays the merged document in an e-mail window that allows one-time editing prior to sending.

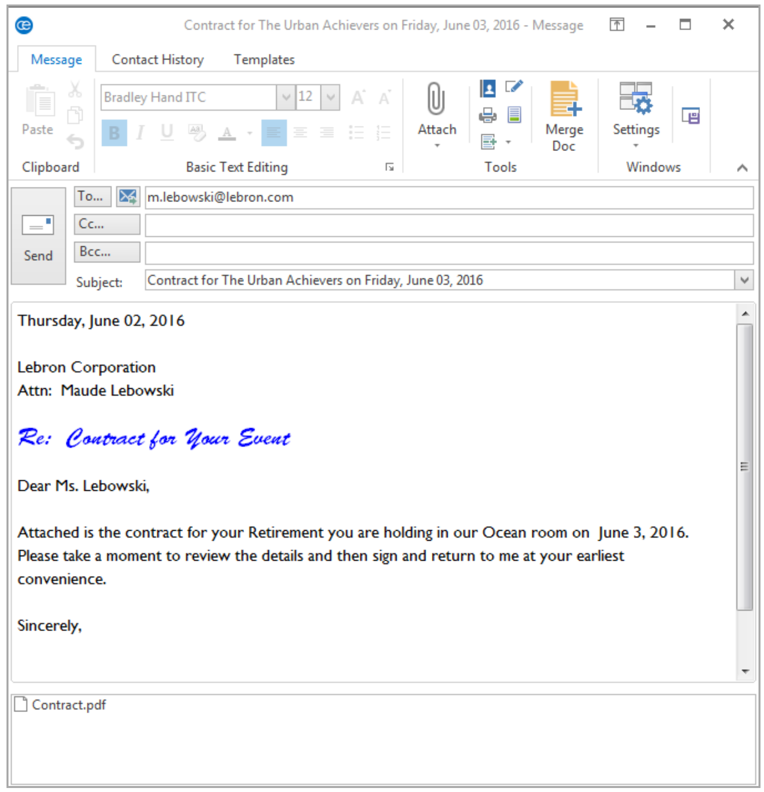
Sending Email from Event Manager

E-mails can be sent directly from Caterease, including attachments or even multiple attachments pertaining to one event (or even multiple events).

Sending a Basic Email Letter

1. Search for and retrieve an event in Event Manager.
2. In the **Home** ribbon tab at the top of your screen, click the **Email** button.
   Result: *An Untitled Message window opens.*
   Note: *This button is also available from any print preview screen, and will automatically attach whatever print you are previewing (Contract, BEO, etc.), to the outgoing e-mail.*
3. Type the e-mail address of the person you want to send your e-mail to in the To field, or click the word **To...** to select from your personal address book.
   Note: *The e-mail address in this field will default to the Booking Contact of the event you currently have open.*
4. Type a subject for your e-mail into the Subject... field, or click the down arrow to the right of the field to access a custom quickpick list.
   Note: *Quickpicks for this field are set up in **Setup** > **Quickpicks** > **General** > **Email Subject**.*
5. Type a message as the body of your e-mail into the large white text block in the window.
   Note: *If you own the Marketing Tools package, you can use one of your custom merge letters as the body of your e-mail (see topic below).*
6. **[Optional]** Format the text of your e-mail using the **Basic Text Editing** tools at the top of your e-mail window.

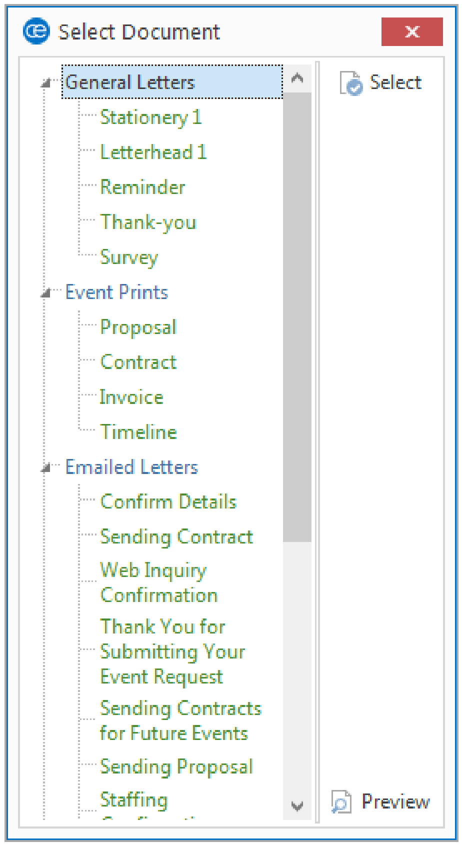
7. When finished, click **Send**.



Using Custom Merge Letters as the Email Body

1. In the **Home** ribbon tab at the top of your screen, click the **Email** button.
   Result: *An Untitled Message window opens.*

2. Click the **Merge Doc** button at the top of the e-mail window.
   Result: *The Select Document window opens.*



3. Double-click the title of any letter, or click the title once and then click the **Select** button at the top right-hand side of the window.
   Result: *A confirmation message appears, asking if you wish to replace existing text.*
   Note: *This message will not appear if there is no existing text.*

4. Click **Yes** to confirm your choice.
   Result: *The Select Document window closes and the contents of the selected letter merge into the e-mail window.*

5. **[Optional]** Edit the e-mail as desired.

6. **[Optional]** Attach files to the e-mail as desired (see topic below).

7. When finished, click **Send**.
   Result: *The e-mail, with attachment(s) is sent.*

Including Attachments in Your Email

1. Click the **Email** button in the **Home** ribbon tab at the top of the screen and

prepare your basic e-mail message by following the steps outlined above.

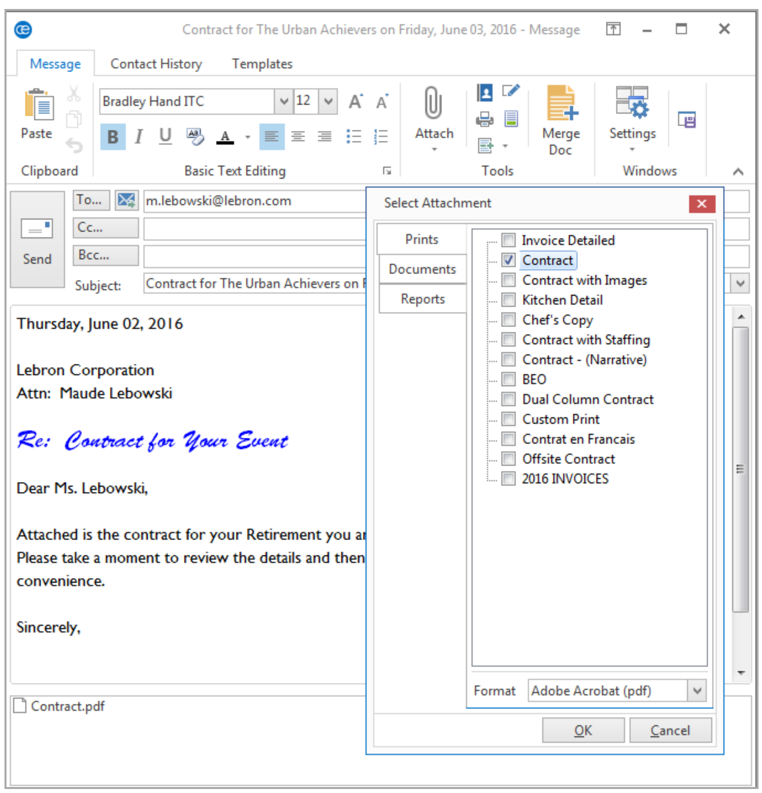
2. Click the **Attach** button, located at the top of the e-mail window, and choose **Print**.
   Result: *The Select Attachment window opens.*
   Note: *The Email button is also available from any print preview screen, and will automatically attach whatever print you are previewing (Contract, BEO, etc.), to the outgoing e-mail.*

3. Click on a tab on the left-hand side of the window, depending on whether you want to include Prints designed in your Print Designer or Documents designed in your Marketing Tools package.

4. Click the checkbox next to the print or prints you want to attach to this e-mail.
   Note: *The default format for attachments (bottom of the window) is Adobe PDF, but can be changed by right-clicking and choosing another option.*

5. Click **OK**.
   Result: *The Select Attachment window closes and your attachments are listed in the box at the bottom of the e-mail window.*

6. When finished, click **Send**.



Account Merge Fields

Use the following merge fields to pull information pertaining to your customers:

Field	Description
Client/Organization	Merges in the name of customer holding the currently selected event.
Address	Merges in the selected customer’s address.
Address 2	Merges in the selected customer’s secondary address, if one has been added to the Address (Other) field. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*
City	Merges in the selected customer’s city.
St/Prov	Merges in the state or province the selected customer is from.
Postal	Merges in the selected customer’s postal/ZIP code.
City, St/Prov Postal	Merges in these three details in City, State/Province, ZIP Code order. This field eliminates the need to select each field separately when they are commonly used in conjunction with one another (in letters and such).
Telephone	Merges in the selected customer's telephone number.
Fax	Merges in the selected customer's fax number.
Reference	Merges in the reference that is attached to the customer. *Note: This is different from the reference that is attached to an event reference; this reference is entered into the account details, and indicates how this customer originally heard of your company.*
Sales Rep	Merges in the sales representative who is associated with this account. *See note under Reference, above.*
Sales Rep Telephone	Merges in the telephone number associated with the sales representative who is associated with this account. *See note under Reference, above.*
Sales Rep Cellular	Merges in the cell phone number associated with the selected account's sales representative. *See note under Reference, above.*
Sales Rep Email	Merges in the e-mail address associated with the selected account's sales representative. *See note under Reference, above.*
Category	Merges in the category (e.g., "Corporate," "Educational," "Government," etc.), that is associated with the selected account. This is a quickpick list you can customize for tracking your customers. *See note under Reference, above.*
Description	Merges in this customer’s description (e.g., "Association Member," "Chamber Member," etc.). This is a quickpick list you can customize for tracking your customers.
Email	Merges in the customer’s e-mail address. *Note: This is the address attached to the customer itself, such as info@acme.com,* ***not*** *to a particular contact person.*
Website	Merges in the customer’s web address. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*
Cellular	Merges in the cell phone number on file for this customer.
Group	Merges in the group of this customer. This is a quickpick list you can customize and use to group related customers together. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*

Field	Description
Account #	Merges in the account number automatically assigned to this customer by the program. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen. You can establish a unique prefix for these numbers up to three characters long (through* ***Administration*** *>* ***Settings*** *>* ***Global Settings*** *>* ***Managers****).*
Account ID #	Merges in this customer's Account ID #. This is a field you can customize. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*
Loyalty #	Merges in the loyalty number associated with the client. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*

Contact Merge Fields

Use the following merge fields to pull information pertaining to the primary (first) contact person listed for a customer:
Note: *To include information pertaining to the contact person of an event, use the Booking/Site Contact merge details under "Event Fields."*

Field	Description
Name	Merges in the first name and last name of the primary (first) contact associated with the client.
Last	Merges in the last name **only** of the primary contact associated with the client.
First	Merges in the first name **only** of the primary contact associated with the client.
Title	Merges in the title of the primary (first) contact associated with the client; e.g., "Owner," "General Manager," etc. This is a quickpick list you can customize.
Salutation	Merges in the salutation of the primary (first) contact associated with the client; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. *Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.*
Address	Merges in the address of the primary (first) contact associated with the client.
Address 2	Merges in the second address of the primary (first) contact associated with the client, if a second address has been entered into the Address (Other) field.
City, St/Prov Postal	Merges in these three details of the primary (first) contact in this order; meant to eliminate the need to select each field separately when they are commonly used in combination (in letters and such).

Event Merge Fields

Use the following merge fields to pull information pertaining to an event:

Field	Description
Event Date (Long)	Merges in the date the event is being held in the format established by your computer's Regional Settings, usually set up as "Saturday, August 29, 2015."
Event Date (Short)	Merges in the date the event is being held in the format established by your computer's Regional Settings, usually set up as "August 29, 2015."
Event Date	Merges in the date the event is being held, in the format "8/29/2015."
Event Date Formatted	Merges in the date of the event and allows you to format it any way you want.
Event Weekday	Merges in the full name of the day of the week that the event takes

Field	Description
	place, in the format "Sunday," "Monday," etc.
Event Weekday (Abbr)	Merges in the first three letters of the day of the week that the event takes place, in the format "Sun," "Mon," etc.
Event Month	Merges in the full month name that the event takes place, in the format "August," "September," etc.
Event Month (Abbr)	Merges in the first three letters of the month that the event takes place, in the format "Aug," "Sep," etc.
Event Begin Date	Merges in the date of the event's earliest sub-event.
Event End Date	Merges in the date of the event's latest sub-event.
Event Begin Time	Merges in the overall event's start time.
Event End Time	Merges in the overall event's end time.
Event Status	Merges in the status of the event, e.g., Prospective, Tentative, Definite, etc.
Planned Guests	Merges in the planned guest count of the event.
Actual Guests	Merges in the actual guest count of the event.
Guaranteed Guests	Merges in the guaranteed guest count of the event.
Party Name	Merges in the party name of the event. e.g., "Smith Wedding Reception," "Jones Birthday Party," etc.
Booking Contact	Merges in the first name and last name of the booking contact of the event.
Booking Contact First	Merges in the first name of the booking contact of the event.
Booking Contact Last	Merges in the last name of the booking contact of the event.
Booking Contact Title	Merges in the title of the booking contact of the event; e.g., "Owner," "General Manager," etc. This is a field you can customize.
Booking Contact Salutation	Merges in the salutation of the booking contact of the event; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. *Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.*
Booking Contact Telephone	Merges in the specific telephone number belonging to the booking contact of the event. *Note: This will likely be different from the general phone number belonging to the customer.*
Booking Contact Fax	Merges in the specific fax number belonging to the booking contact of the event. *See note under Booking Contact Salutation, above.*
Booking Contact Cellular	Merges in the specific cell phone number belonging to the booking contact of the event. *See note under Booking Contact Salutation, above.*
Booking Contact Email	Merges in the specific e-mail address belonging to the booking contact of the event. *See note under Booking Contact Salutation, above.*
Booking Contact Address	Merges in the specific address belonging to the booking contact of the event. *See note under Booking Contact Salutation, above.*
Booking Contact City, St/Prov, Postal	Merges in these three details in City, State/Province, ZIP Code order. *See note under Booking Contact Salutation, above.*
Site Contact	Merges in the first name and last name of the site contact of the event.
Site Contact First	Merges in the first name only of the site contact.
Site Contact Last	Merges in the last name only of the site contact.
Site Contact Title	Merges in the title of the site contact of the event; e.g., "Owner," "General Manager," etc. This is a quickpick list you can customize.
Site Contact Salutation	Merges in the salutation of the site contact of the event; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. *Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.*

Field	Description
Site Contact Telephone	Merges in the specific telephone number belonging to the site contact of the event. *Note: This will likely be different from the general phone number belonging to the customer.*
Site Contact Fax	Merges in the specific fax number belonging to the site contact of the event. *See note under Site Contact Salutation, above.*
Site Contact Cellular	Merges in the specific cell phone number belonging to the site contact of the event. *See note under Site Contact Salutation, above.*
Site Contact Email	Merges in the specific email address belonging to the site contact of the event. *See note under Site Contact Salutation, above.*
Sales Rep	Merges in the name of the sales representative who is attached to this event.
Sales Rep Telephone	Merges in the telephone number associated with the sales representative who is attached to this event.
Sales Rep Cellular	Merges in the cellular phone number associated with the sales representative who is attached to the selected event.
Sales Rep Email	Merges in the specific e-mail address belonging to the sales representative of the selected event.
Event Category	Merges in the category of the event, which is a customizable quickpick list you can use to track your events. *Note: This category is different from the Category associated with the account. Each event might have its own category.*
Event Theme	Merges in the theme of the event.
Event Reference	Merges in the reference of the event. *Note: This reference is different from the Reference associated with the account. Each event might have its own reference, while the Account Reference is entered into the account details, and indicates how this customer originally heard of your company.*
Event Pay Method	Merges in the pay method of the event, as entered on the Miscellaneous tab in Event Manager. *Note: This is the general pay method of the event, not the pay method of an individual payment.*
Event Credit Card Number	Merges in the Credit Card number that will be used to pay for the event.
Business Type	Merges in the business type of the event, e.g., "Full Service, " "Delivery," etc. This is a customizable quickpick list.
Operation	Merges in the operation of the event. This is a quickpick list you can use to track multiple locations.
Event Number	Merges in the event number automatically assigned to this event by the program. *Note: You can establish a unique prefix for these numbers up to three-characters long (through **Administration** > **Settings**> **Global Settings**).*
PO Number	Merges in the purchase order number for the event, if you have entered one. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*
Folio Number	Merges in the folio number (unique number identifying your account, for record-keeping purposes) for the event. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*
Billing Client	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client’s name; if you have not, this field will merge in the name of the customer holding the event.
Billing Address	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client’s address; if you have not, this field will merge in the address of the customer holding the event.
Billing City	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client’s

Field	Description
	city; if you have not, this field will merge in the city of the customer holding the event.
Billing St/Prov	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's state or province; if you have not, this field will merge in the state or province of the customer holding the event.
Billing Postal	If you have entered alternative details in the Optional Billing Information tool in Event Manager, this field will merge in that billing client's postal/ZIP code; if you have not, this field will merge in the postal/ZIP code of the customer holding the event.
Booked Date	Merges in the date on which this event was originally entered into Caterease. This date is automatically assigned by the program, but you can edit the date, if necessary.
Booked Date Formatted	Merges in the booked date, using formatting.
Revised Date/Time	Merges in the date and time on which this event was last revised Caterease. This date is automatically assigned by the program.
Adults	Merges in the adult guest count of the event. *Note: This field is not usually displayed on your screen by default, but you can easily add it to your screen. You can rename this field.*
Children	Merges in the children guest count of the event. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen. You can rename this field.*
Loyalty Number	Merges in the loyalty number associated with the event; usually defaults from the client or contact person. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen. You can rename this field.*
Discount Comment	Merges in the discount comment entered in the Comment field on the Event Discounts window (**Home** > **Tools** > **Default Discounts**) in Event Manager.
Event Notes	Merges in all text in the Event Notes text block, complete with rich-text formatting.
Event Notes (Unformatted)	Merges in all text in the Event Notes text block, without any formatting (so it adopts the formatting of the merge document).
Allergy Alert	Merges in all text in the Allergy Information text block (**Home** > **Tools** > **Allergy Information**), complete with rich-text formatting.
Allergy Alert (Unformatted)	Merges in all text in the Allergy Information text block (**Home** > **Tools** > **Allergy Information**), without any formatting (so it adopts the formatting of the merge document).

Sub-Event Merge Fields

Use the following merge fields to pull information pertaining to the currently selected sub-event of a party (the first sub-event is selected by default):
Note: *To include information from multiple sub-events, use a sub-event merge table.*

Field	Description
Description	Merges in the description of the event's first sub-event; e.g., "Dinner Buffet," "Meeting," "Breakfast," etc.
Type	Merges in the type of the event's first sub-event, e.g., "On Premise," Off Premise," etc.
Time: Start	Merges in the start time of the event's first sub-event.
Time: End	Merges in the end time of the event's first sub-event.

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

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

Staffing Merge Fields

Use the following merge fields to pull information pertaining to the staff working a party:

Note: *The Staffing Merge Fields listed below are designed to be used to create e-mails that can be sent in batch to several employees from the Staffing Activity Query results screen. Thus, each merge field merges data specific to one individual employee and one shift.*

Field	Description
Employee Name	Merges in the first and last name of the employee.
Start	Indicates the time this specific shift begins; can be set to default to any time associated with the event, and can be edited when necessary.
End	Indicates the time this specific shift ends; can be set to default to any time associated with the event, and can be edited when necessary.
Position	Indicates the specific shift or position needed for this sub-event (Waiter, Bartender, etc.).
Uniform	Merges in the uniform the employee will wear when working a particular shift; offers a custom quickpick list of choices.

Financial Merge Fields

Use the following merge fields to pull information pertaining to the finances of an event:

Field	Description
Subtotal	Merges in the subtotal for the entire event.
Gratuity	Merges in the total gratuity for the entire event.
Service Charge	Merges in the total service charge for the event.
Tax	Merges in the total tax for the event.
Total	Merges in the total of the event, including tax and service charge.
Paid	Merges in the total amount paid to day for the event.
Balance	Merges in the currently outstanding balance for the event.
Cost	Merges in the total cost (to you) of the event; includes cumulative costs of menu items, as well as staffing and any additional cost adjustments you might have made using the Event Costing Summary tool.
Profit	Merges in the total profit for the event.
Discount	Merges in the total discount that has been applied to the event using the Event Discounts tool.
Value	Merges in the Event Value based on parameters you can establish in your Global Settings.
Next Deposit	Merges in the amount of the next deposit scheduled for the event. *Note: Deposits are scheduled using the Deposits Due tool in Event Manager.*
Next Deposit Due Date	Merges in the due date of the next deposit scheduled for the event (see note above).
Cost Per Guest	Merges in the cost per guest for the event that is automatically calculated by dividing the TOTAL of the event by the guest count.
Cost Per Guest (from Subtotal)	Merges in the cost per guest automatically calculated by dividing the SUBTOTAL by the guest count.
Cancel Charge	Merges in the cancellation charge for the event, as entered into the **Miscellaneous** tab in Event Manager.
Cancel Date	Merges in the date on which the selected event was cancelled. This date is automatically assigned by the program, but you can edit this, if necessary.
Room Chg	Merges in the amount entered in the Room Charge field on the **Venue** tab of the Sub-Event window.
Delivery Charge	Merges in the amount entered in the Delivery Charge field on the **Delivery** tab of the Sub-Event window.
Food Subtotal	Merges in the sum total of all menu items with a type of “Food” ordered for the entire event.
Beverage Subtotal	Merges in the sum total of all menu items with a type of “Beverage” ordered for the entire event.
Liquor Subtotal	Merges in the sum total of all menu items with a type of “Liquor” ordered for the entire event.
Equipment Subtotal	Merges in the sum total of all menu items with a type of “Equipment” ordered for the entire event.
Labor Subtotal	Merges in the sum total of all menu items with a type of “Labor” ordered for the entire event.
Room Subtotal	Merges in the sum total of all menu items with a type of “Room” ordered for the entire event.
Other Subtotal	Merges in the sum total of all menu items with a type of “Other” ordered for the entire event.
Food Gratuity	Merges in only the food gratuity for the event.

Field	Description
Beverage Gratuity	Merges in only the beverage gratuity for the event.
Liquor Gratuity	Merges in only the liquor gratuity for the event.
Equipment Gratuity	Merges in only the equipment gratuity for the event.
Labor Gratuity	Merges in only the labor gratuity for the event.
Room Gratuity	Merges in only the room gratuity for the event.
Other Gratuity	Merges in only the gratuity for items that have been established as "Other" in your Default Tax & Service Charge Rates.
Food Service Charge	Merges in only the food service charge for the event.
Beverage Service Charge	Merges in only the beverage service charge for the event.
Liquor Service Charge	Merges in only the liquor service charge for the event.
Equipment Service Charge	Merges in only the equipment service charge for the event.
Labor Service Charge	Merges in only the labor service charge for the event.
Room Service Charge	Merges in only the room service charge for the event.
Other Service Charge	Merges in only the service charge for items that have been established as "Other" in your Default Tax & Service Charge Rates.
Food Tax	Merges in only the food tax for the event.
Beverage Tax	Merges in only the beverage tax for the event.
Liquor Tax	Merges in only the liquor tax for the event.
Equipment Tax	Merges in only the equipment tax for the event.
Labor Tax	Merges in only the labor tax for the event.
Room Tax	Merges in only the room tax for the event.
Other Tax	Merges in only the tax for items that have been established as "Other" in your Default Tax & Service Charge Rates.
Food Total	Merges in only the food total for the event.
Beverage Total	Merges in only the beverage total for the event.
Liquor Total	Merges in only the liquor total for the event.
Equipment Total	Merges in only the equipment total for the event.
Labor Total	Merges in only the labor total for the event.
Room Total	Merges in the room total for the event.
Other Total	Merges in the total for items that have been established as "Other" in your Default Tax & Service Charge Rates.
Taxes: First	Merges in the total First Tax (from the first tax column) for the event. *Note: Many companies will only use this first column, and thus do not need this breakdown. Those companies can simply use the "Tax" merge field, above*.
Taxes: Second	Merges in the total Second Tax (from the second tax column) for the event. *See note above.*
Taxes: Third	Merges in the total Third Tax (from the third tax column) for the event. *See note above.*

Sub-Event Financial Merge Fields

Use the following merge fields to pull information pertaining to the finances of a sub-event.

Field	Description
Subtotal	Merges in the subtotal for the sub-event.
Gratuity	Merges in the total gratuity for sub-event.
Service Charge	Merges in the total service charge for the sub-event.
Total	Merges in the total of the sub-event, including tax and service charge.
Cost Per Guest	Merges in the cost per guest for the sub-event that is automatically calculated by dividing the TOTAL of the event by the guest count.
Cost Per Guest (Subtotal)	Merges in the cost per guest automatically calculated by dividing the SUBTOTAL by the guest count.

Proposal Merge Fields

Use the following merge fields to pull information pertaining to proposals created in Prospect Manager:

Field	Description
Party Name	Merges in the Party Name of the proposal.
Sales Rep	Merges in the sales representative of the proposal.
Sales Rep Telephone	Merges in the specific telephone number belonging to the sales representative of the proposal.
Sales Rep Cellular	Merges in the specific cell phone number belonging to the sales representative of the proposal.
Sales Rep Email	Merges in the specific e-mail address belonging to the sales representative of the proposal.
Proposal Category	Merges in the category of the proposal, which is a customizable quickpick list you can use to track your prospects. *Note: This field can be renamed.*
Theme	Merges in the theme of the proposal.
Reference	Merges in the reference of the proposal.
Booking Contact	Merges in the first name and last name of the booking contact of the proposal.
Booking Contact Title	Merges in the title of the booking contact of the proposal; e.g., “Owner,” “General Manager,” etc.
Booking Contact Salutation	Merges in the salutation of the booking contact of the proposal; e.g., “Tom,” “Mr. Smith,” “Mrs. Johnson,” etc. *Note: Salutations are generally created to come at the beginning of a merge letter, between the word “Dear” and the comma.*
Booking Contact Telephone	Merges in the specific telephone number belonging to the booking contact associated with the proposal.
Booking Contact Email	Merges in the specific e-mail address belonging to the booking contact associated with the proposal.
Planned Guests	Merges in the planned guest count of the proposal.
Actual Guests	Merges in the actual guest count of the proposal.
Date	Merges in the date on which the proposed event would take place.
Start Time	Merges in the start time established in the proposal.
End Time	Merges in the end time established in the proposal.
Subtotal	Merges in the subtotal established in the proposal.
Gratuity	Merges in the gratuity established in the proposal.
Serv Charge	Merges in the service charge established in the proposal.
Tax	Merges in the tax established in the proposal.
Total	Merges in the total established in the proposal.
Cost Per Guest	Merges in the cost per guest for the proposal (automatically calculated by dividing the TOTAL by the guest count).

Field	Description
Cost Per Guest (from Subtotal)	Merges in the cost per guest for the proposal (automatically calculated by dividing the SUBTOTAL by the guest count).
Notes	Merges in all text in the Notes text block in Prospect Manager, complete with rich-text formatting.
Notes (Unformatted)	Merges in all text in the Notes text block in Prospect Manager, without any formatting (so it adopts the formatting of the merge document).
Comments	Merges in all text on the Comments tab in Prospect Manager (Details area of the Proposal), complete with rich-text formatting.
Comments (Unformatted)	Merges in all text in the Comments tab in Prospect Manager (Details area of the Proposal), without any formatting (so it adopts the formatting of the merge document).

Employee Merge Fields

Use the following merge fields to pull information pertaining to your employees, as established in Employee Manager:

Field	Description
Name	Merges in the first name and last name of the employee.
Last	Merges in the last name only of the employee.
First	Merges in the first name only of the employee.
Agency	Merges in an Employment Agency. *Note: This field is not displayed on your screen by default, but you can easily add it to your screen.*
Employee #	Merges in the Employee #. This number is auto-assigned by Caterease. *Note: You can establish a unique prefix for these numbers up to three characters long (through **Administration** > **Settings** > **Global Settings** > **Managers**).*
Email	Merges in the specific email address belonging to the employee for the selected event.
Home Address	Merges in the employee's home address.
City, St/Prov Postal	Merges in these three details of employee; meant to eliminate the need to select each field separately when they are commonly used in combination (in letters and such).
Telephone	Merges in the telephone number for the employee.
Cellular	Merges in the cellular phone number for the employee.
Notes	Merges in all text contained within the Notes area on the main screen in Employee Manager, complete with rich text formatting.
Notes (Unformatted)	Merges in all text contained within the Notes area on the main screen in Employee Manager, without any formatting (so it adopts the formatting of the merge document).

Guestrooms Merge Fields

Use the following merge fields to pull information pertaining to group rooms contracts created in Guestrooms Manager:

Field	Description
Arrival Date	Merges in the arrival date of the group rooms booking.
Departure Date	Merges in the departure date of the group rooms booking.
Group Name	Merges in the group name of the group rooms booking.
Status	Merges in the status of the group rooms booking.
Booking Contact	Merges in the first name and last name of the booking contact of the

Field	Description
	group rooms booking.
Booking Contact Title	Merges in the title of the booking contact of the group rooms booking; e.g., "Owner," "General Manager," etc.
Booking Contact Salutation	Merges in the salutation of the booking contact of the group rooms booking; e.g., "Tom," "Mr. Smith," "Mrs. Johnson," etc. *Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.*
Booking Contact Telephone	Merges in the telephone number for the group rooms booking contact.
Booking Contact Cellular	Merges in the cellular number for the group rooms booking contact.
Booking Contact Email	Merges in the e-mail address for the group rooms booking contact.
Site Contact	Merges in the first name and last name of the site contact of the group rooms booking.
Site Contact Title	Merges in the title of the site contact of the group rooms booking; e.g., "Owner," "General Manager," etc.
Site Contact Salutation	Merges in the salutation of the site contact of the group rooms booking; e.g., "Tom", "Mr. Smith", "Mrs. Johnson", etc. *Note: Salutations are generally created to come at the beginning of a merge letter, between the word "Dear" and the comma.*
Site Contact Telephone	Merges in the telephone number for the group rooms site contact.
Site Contact Cellular	Merges in the cellular number for the group rooms site contact.
Site Contact Email	Merges in the e-mail address for the group rooms site contact.
Sales Rep	Merges in the sales representative of the group rooms booking.
Method of Reservation	Merges in the method of reservation of the group rooms booking.
Reservation Cut-Off	Merges in the reservation cut-off date of the group rooms booking.
Pay Method	Merges in the payment method of the group rooms booking.
Contract Return Date	Merges in the contract return date of the group rooms booking.
Log #	Merges in the log # (automatically assigned by the program) of the group rooms booking.
Folio #	Merges in the folio # of the group rooms booking.
Room Count	Merges in the total number of rooms blocked for the group rooms booking.
Tax	Merges in the total taxes of the group rooms booking.
Total	Merges in the total of the group rooms booking.
Next Deposit	Merges in the amount of the next deposit due for the group rooms booking.
Next Deposit Due Date	Merges in the due date of the next deposit due for the group rooms booking.
Notes	Merges in all text in the Notes text block in Guestrooms Manager, complete with rich-text formatting.
Notes (Unformatted)	Merges in all text contained within the Notes area on the main screen in Guestrooms Manager, without any formatting (so it adopts the formatting of the merge document).
Comments	Merges in all text on the Comments tab in Guestrooms Manager (Details area of the Proposal), complete with rich-text formatting.
Comments (Unformatted)	Merges in all text in the Comments tab in Guestrooms Manager, without any formatting (so it adopts the formatting of the merge document).

User Defined Merge Fields

Use the following merge fields to pull information entered into your custom user-defined fields:

Field	Description
Account User Defined Fields	Lists all custom fields you may have created for your accounts (customers).
Event User Defined Fields	Lists all custom fields you may have created for your events.
Sub-Event User Defined Fields	Lists all custom fields you may have created for your sub-events (meals).
Site User Defined Fields	Lists all custom fields you may have created for your site locations.
Proposal User Defined Fields	Lists all custom fields you may have created for your proposals in Prospect Manager.
Guestrooms User Defined Fields	Lists all custom fields you may have created for your group rooms bookings.

Special Merge Fields

Use the following merge fields to put miscellaneous information on your document:

Field	Description
Current Date (Long)	Merges in the current date, including day, in the format "Saturday, August 29, 2015."
Current Date	Merges in the current date, in the format "8/29/2015."
Current Date Formatted	Merges in the current date, which can be formatted as desired.
Current Time	Merges in the current time, in the format "05:35 pm."
Tax Exempt	Merges in the words "Tax Exempt" if the event is tax exempt; if not, remains blank.
Exempt Number	Merges in the word "Number:" followed by the event's tax exempt number, if one exists; if not, remains blank.
Current Date & Time	Merges in the current date and time.

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