

# Training Guide



# **Queries and Detail Grids**

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# Tracking Current Events and Accounts Receivable

# **Unit 1: Tracking Current Events and Accounts Receivable**

Caterease offers many query tools to help you instantly find any data you need. Queries are standardized for consistency and functionality. Each query begins with a base query window, where fields can be selected that are specific to the records returned. Filters or query conditions can be set in order to further customize your query results. All query tools remain open as you zig-zag around your program, resulting in fast navigation. So, if you double-click on a party in one of your query grids and then open that event in Event Manager, the query you ran will remain open in the background.

The Current Events Query is designed to show details about your upcoming events. Using this tool, you can see a complete list of all events scheduled for the next week, two weeks, month, etc., all with a single mouse click. What's more, you can generate a multitude of prints based on your results: numerous financial and detail reports in a variety of different layouts; contracts, invoices, and other event prints; miscellaneous prints, including staffing sheets, ingredients lists, costing summaries, and more. You can print one, several, or all of your events, with a single mouse click. You can even generate batch e-mails, attaching any number of prints and using a dynamic merge letter as the body of your outgoing message!

Using the powerful Current Events tool, you can quickly and easily track all upcoming events - or only those in the next week, two weeks, month, etc. Results are displayed in a detail grid, which can then be customized to show any information you want and then printed or even exported in a variety of formats. The Accounts Receivable Query, also discussed in this unit, will quickly track all of your upcoming events with a date that has passed and a balance still outstanding. You can choose to look at only those events that are 30 days out, 60 days out, etc.

#### Objectives:

Upon completing this unit, you will be able to:

- Query the program for all of your current (upcoming) events.
- Query events in a certain date range, i.e., one week out, two weeks out, etc.
- Generate reports based on the results of your queries.
- Print a contract or other event print for one, several, or all of the events in your query results.
- Save custom lists of multiple prints for instant access.
- Generate a unique e-mail letter, with attachment, to one, several, or all of the events in your query results.
- Query all accounts receivables, including accounts that are specifically 30, 60, 90, or 120 days past due.

# **Tracking Current Events**

Using the powerful Current Events tool, you can quickly and easily track all upcoming events - or only those in the next week, two weeks, month, etc. Results are displayed in a detail grid, which can then be

customized to show any information you want and then printed or even exported in a variety of formats.

#### **Tracking Your Current Events**

- 1. Click the **Tools** sidebar group, located on the left-hand side of the screen.
- 2. Click the **Current Events** button. *Result:* The Current Events Base Query window opens.

Current Events Base Query	×
Set Parameters	
Options	
Days Out	
Total Current Events	>
Exclude Status	
None selected	~
Remote Data	
Include Remote Data	
Don't Show Window	OK <u>C</u> ancel

- 3. Click the down arrow to the right of the <u>Days Out</u> field and choose how many days out you would like your search to go.
- [Optional] Click the down arrow to the right of the <u>Exclude Status</u> field and select any event statuses you would like excluded from your query. *Note: Placing a check in a box causes the tool to exclude events with that status from your results.*
- 5. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.
- 6. When finished, click **OK**. *Result: The events matching your criteria are listed in a detail grid.* 
  - **Tip:** Click the **SQL** button, located on the upper right-hand side of the window, to edit your query criteria.

**Tip:** Click into the checkbox labeled **Don't Show Window** at the bottom left of the tool to automatically display your grid results. You can quickly edit your query criteria at any time.

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Filter									
Filter AN	D applies to the n	nain query							14
Click bere t	o add a new cond	ition							
click liefe t	o add a new cond	hion							
									4
otal Curre	nt Events)								5
lesults									
Event #	Event Date 🔺	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total	^
E00454	5/18/2016	Tentative	Ladtech	Kathy Wilson	\$713.75	\$98.20	\$49.97	\$861.92	
E00463	5/18/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$1,215.80	\$194.53	\$85.11	\$1,495.44	i
	5/21/2016	Tentative	Naples Deptal Acces	Kathy Wilson	6662.50	6106.16	645 AF	0045.44	
E00389	J/21/2010	rentative	Indpies Derital Associ	Katily wilson	2002-20	2100.10	\$46.45	\$810.11	
E00389 E00356	5/24/2016	Definite	Ducks Unlimited	Roxanne M. Mc N	\$3,436.65	\$513.86	\$46.45 \$230.07	\$4,180.58	
E00389 E00356 E00005	5/24/2016 5/24/2016	Definite Tentative	Ducks Unlimited Greg's Soccer Team	Roxanne M. Mc N Kathy Wilson	\$3,436.65 \$1,612.95	\$513.86 \$258.07	\$46.45 \$230.07 \$112.91	\$4,180.58 \$1,983.93	
E00389 E00356 E00005 E00466	5/24/2016 5/24/2016 5/24/2016	Definite Tentative Tentative	Ducks Unlimited Greg's Soccer Team Schad Associates	Roxanne M. Mc M Kathy Wilson John Smith	\$3,436.65 \$1,612.95 \$0.00	\$513.86 \$258.07 \$0.00	\$46.45 \$230.07 \$112.91 \$0.00	\$4,180.58 \$1,983.93 \$0.00	
E00389 E00356 E00005 E00466 E00226	5/24/2016 5/24/2016 5/24/2016 5/22/2016 5/25/2016	Definite Tentative Tentative Definite	Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding	Roxanne M. Mc ř Kathy Wilson John Smith Roxanne M. Mc ř	\$3,436.65 \$1,612.95 \$0.00 \$13,087.48	\$106.16 \$513.86 \$258.07 \$0.00 \$2,093.99	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60	
E00389 E00356 E00005 E00466 E00226 E00459	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/25/2016 5/27/2016	Definite Tentative Tentative Definite Tentative	Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co.	Roxanne M. Mc I Kathy Wilson John Smith Roxanne M. Mc I John Smith	\$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50	\$106.16 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93	
E00389 E00356 E00005 E00466 E00226 E00459 E00402	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/25/2016 5/27/2016 5/28/2016	Definite Tentative Tentative Definite Tentative Tentative	Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P.	Roxanne M. Mc ř Kathy Wilson John Smith Roxanne M. Mc ř John Smith John Smith	\$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50 \$294.50	\$106.16 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24	
E00389 E00356 E00005 E00466 E00226 E00459 E00402 E00003	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/27/2016 5/27/2016 5/28/2016 5/29/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative	Treples Derival Associ Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team	Roxanne M. Mc f Kathy Wilson John Smith Roxanne M. Mc f John Smith John Smith Kathy Wilson	\$005.30 \$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50 \$294.50 \$1,697.95	\$106.16 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49	
E00389 E00356 E00005 E00466 E00226 E00459 E00402 E00003 E00380	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/27/2016 5/27/2016 5/28/2016 5/29/2016 6/3/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative Tentative	Neples Definal Assoc. Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team Lebron Corporation	Roxanne M. Mc f Kathy Wilson John Smith Roxanne M. Mc f John Smith John Smith Kathy Wilson Roxanne M. Mc f	\$005.30 \$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50 \$294.50 \$1,697.95 \$5,620.00	\$100.18 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67 \$899.20	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87 \$393.40	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49 \$6,912.60	
E00389 E00356 E00005 E00466 E00226 E00459 E00402 E00003 E00380 E00382	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/27/2016 5/27/2016 5/28/2016 5/29/2016 6/3/2016 6/3/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative Tentative Tentative	The piece Vertical Associ- Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team Lebron Corporation Naples City Police Department	Roxanne M. Mc f Kathy Wilson John Smith Roxanne M. Mc f John Smith John Smith Kathy Wilson Roxanne M. Mc f Jo Ann Mulnix	\$3,436,65 \$1,612,95 \$0,00 \$13,087,48 \$697,50 \$294,50 \$1,697,95 \$5,620,00 \$1,138,75	\$100.18 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67 \$899.20 \$182.20	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87 \$393.40 \$79.72	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49 \$6,912.60 \$1,400.67	
E00389 E00356 E0005 E00466 E00226 E00459 E00402 E00003 E00380 E00382 E00390	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/25/2016 5/27/2016 5/28/2016 5/29/2016 6/3/2016 6/4/2016 6/11/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative Tentative Tentative Tentative	Trapies Dental Assoc. Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team Lebron Corporation Naples City Police Department Naples Dental Assoc.	Roxanne M. Mc Ì Kathy Wilson John Smith Roxanne M. Mc Ì John Smith Kathy Wilson Roxanne M. Mc Ì Jo Ann Mulnix Kathy Wilson	\$005.50 \$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50 \$294.50 \$1,697.95 \$5,620.00 \$1,138.75 \$538.50	\$100.18 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67 \$899.20 \$182.20 \$86.16	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87 \$393.40 \$79.72 \$37.70	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49 \$6,912.60 \$1,400.67 \$662.36	
E00389 E00356 E0005 E00466 E00226 E00459 E00402 E0003 E00380 E00382 E00390 E00464	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/25/2016 5/25/2016 5/29/2016 6/3/2016 6/4/2016 6/11/2016 6/12/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative Tentative Tentative Tentative Tentative	Neples Definal Assoc. Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team Lebron Corporation Naples City Police Department Naples Dental Assoc. Jason Becker	Roxanne M. Mc 1 Roxanne M. Mc 1 John Smith Roxanne M. Mc 1 John Smith Kathy Wilson Roxanne M. Mc 1 Jo Ann Mulnix Kathy Wilson John Smith	\$003.50 \$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50 \$294.50 \$1,697.95 \$5,620.00 \$1,138.75 \$538.50 \$1,535.00	\$100.18 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67 \$899.20 \$182.20 \$182.20 \$86.16 \$245.60	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87 \$393.40 \$79.72 \$37.70 \$107.45	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49 \$6,912.60 \$1,400.67 \$662.36 \$1,888.05	
E00389 E00356 E00005 E00466 E00226 E00402 E00402 E00402 E00380 E00380 E00382 E00390 E00464 E00384	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/25/2016 5/27/2016 5/29/2016 6/3/2016 6/3/2016 6/12/2016 6/12/2016 6/18/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative Tentative Tentative Tentative Tentative Tentative Tentative Definite	Neples Definal Assoc. Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team Lebron Corporation Naples Dental Assoc. Jason Becker Natasha White	Roanne M. Mc I Roxanne M. Mc I John Smith Roxanne M. Mc I John Smith John Smith Kathy Wilson Roxanne M. Mc I Jo Ann Mulnix Kathy Wilson John Smith Roxanne M. Mc I	\$003.50 \$3,436.65 \$1,612.95 \$0.00 \$13,087.48 \$697.50 \$294.50 \$1,087.95 \$5,620.00 \$1,138.75 \$538.50 \$1,535.00 \$5,455.00	\$100.18 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67 \$899.20 \$182.20 \$182.20 \$86.16 \$245.60 \$872.80	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87 \$393.40 \$79.72 \$37.70 \$107.45 \$381.85	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49 \$6,912.60 \$1,400.67 \$662.36 \$1,888.05 \$6,709.65	
E00389 E00356 E00005 E00466 E00226 E00459 E00402 E00002 E00380 E00382 E00382 E00390 E00464 E00384 E00403	5/24/2016 5/24/2016 5/24/2016 5/25/2016 5/25/2016 5/25/2016 5/29/2016 6/3/2016 6/3/2016 6/12/2016 6/12/2016 6/18/2016	Definite Tentative Tentative Definite Tentative Tentative Tentative Tentative Tentative Tentative Tentative Tentative Definite Tentative	The pies Definal Assoc. Ducks Unlimited Greg's Soccer Team Schad Associates Lenox/Uchtman Wedding Diebold Co. Wiggins, Goodlette & Davis P. Greg's Soccer Team Lebron Corporation Naples City Police Department Naples Dental Assoc. Jason Becker Natasha White Wiggins, Goodlette & Davis P.	Roanne M. Mc f Roxanne M. Mc f Kathy Wilson John Smith John Smith John Smith John Smith Sathy Wilson Joh Ann Mulnix Kathy Wilson John Smith Roxanne M. Mc f John Smith	\$005.50 \$3,436.65 \$0.00 \$13,087.48 \$697.50 \$294.50 \$1,697.95 \$5,620.00 \$1,138.75 \$538.50 \$1,535.00 \$5,455.00 \$294.50	\$100.18 \$513.86 \$258.07 \$0.00 \$2,093.99 \$111.60 \$47.12 \$271.67 \$899.20 \$182.20 \$86.16 \$245.60 \$87.2.80 \$47.12	\$46.45 \$230.07 \$112.91 \$0.00 \$916.13 \$48.83 \$20.62 \$118.87 \$393.40 \$79.72 \$37.70 \$107.45 \$381.85 \$20.62	\$816.11 \$4,180.58 \$1,983.93 \$0.00 \$16,097.60 \$857.93 \$362.24 \$2,088.49 \$6,912.60 \$1,400.67 \$6,912.60 \$1,400.67 \$6,709.65 \$3,62.24	

# Generating Reports from a Results Grid

Several pre-formatted reports are available in a variety of layouts, to show financial information and general details about all of the events listed in your query result grid.

#### Generating Reports from a Results Grid

- 1. Generate a query, as described above.
- Click the *top half* of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.
   *Result:* The Select Desired Print window opens, where you can select your reports from a floating window.
- 3. Click on the **Reports** tab.
- 4. Select the title of the report you want to print. (See the table, below, for a description of the various reports.)

ustom:	o Views ▼ ▼ F	ilters 🔹 🦙 Lay	/out ▼		🔠 🖺 Cha	rt By Busin	ess Type	×	<b>•</b>
Filter				🕲 Select Desir	red Print	×			
Filter ANI	<u>0</u> applies to the <u>itus</u> <u>equals</u> De	main query finite			→ Multi	ple			
Click h	ere to add a new	v condition		Reports	# Financials				
				Drinte	General Financials				
					Extended Financials				
(Total Accounts Receivable)				Subprints	Payments Made				
. stan Accou	no necelvable)			Documents	Tax Breakdown				
Results				Labels	Revenue Summary				
Event #	Event Date	<ul> <li>Status</li> </ul>	♥ Clier	Labels	4 Details	a	Tax	Total	^
E00392	12/12/2015	Definite	Wigo		General Details	1.12	\$20.62	\$362.24	
E00394	12/26/2015	Definite	Wigo		Event Specific Dates	7.44	\$20.76	\$364.70	
E00423	1/15/2016	Definite	Lebro		Include Sub-Events		\$105.53	\$1,854,23	
E00395	1/16/2016	Definite	Wigo		Extended Details	7.12	\$20.62	\$362.24	
E00413	1/16/2016	Definite	Char			5.60	\$107.89	\$1,895.74	
E00414	1/18/2016	Definite	Cruis			3.96	\$78.29	\$1,450.75	
E00317	1/19/2016	Definite	Evert			1.20	\$0.00	\$1,308.70	
E00439	1/25/2016	Definite	Warr			2.04	\$27.14	\$476.93	
E00419	1/26/2016	Definite	Duck			1.06	\$154.47	\$2,852.18	
E00396	1/30/2016	Definite	Wigg			1.12	\$20.62	\$362.24	
E00426	1/30/2016	Definite	Ladte			7.60	\$38.33	\$823.43	
E00429	1/30/2016	Definite	Napl			5.16	\$37.70	\$662.36	
E00433	2/2/2016	Definite	Robe			1.16	\$36.82	\$646.98	
E00164	2/4/2016	Definite	MQ		[	2.56	\$86.00	\$1,487.06	
E00440	2/11/2016	Definite	Colli	Close After	Print Close	5.23	\$251.66	\$4,422.09	
	2 (12 (2010	Definition	Dares		2	3.04	\$115.08	\$2,022,12	

- Click the Print button, located at the bottom of the window. *Result:* The Print Preview displays. *Note:* Multiple printing is not available (or necessary) for reports.
- 6. **[Optional]** Click your right mouse button over any report title and choose **Rename Report** to change the name of the selected title. Click the right mouse button again and choose **Save Report Titles** if you want that change to be permanent. (You will receive a confirmation prompt. Click **Yes** to confirm your choice.)

#### **Available Reports**

Default Report Title	Contents
General Fin- ancialsClient/Organization, Event Number; Event Date; Food Total, Br Total, Liquor Total, Equipment Total, Labor Total, Room Total, Total; Subtotal; Gratuity; Service Charge; Tax; TotalExtended 	
General Fin- ancialsClient/Organization, Event Number; Event Date; Food Total, Ber Total, Liquor Total, Equipment Total, Labor Total, Room Total, ( Total; Subtotal; Gratuity; Service Charge; Tax; TotalExtended FinancialsSame as above, plus: Sales Rep; Guests; Amount Paid; Balar tional Food/Service Item Types; Variance (Days Out)Payments MadeClient/Organization; Event Number; Event Date; Telephon( Rep; Category; Guests; Subtotal; Cratuit)	
Payments Made	Client/Organization; Event Number; Event Date; Telephone; Sales Rep; Category; Guests; Subtotal; Gratuity; Service Charge; Tax; Total; Amount Paid; Balance; Next Deposit; Next Deposit Due Date; Variance (Days Out) The following payment details (money received) are also included: Payment Date; Payment Amount; Pay Method The following deposit details (money scheduled to be received) are included: Due Date; Deposit Amount; Paid (Yes/No); Payment Date
Tax Break- down	Identical to General Financials Report, above, with the following addi- tional fields: Taxes 1, Taxes 2, Taxes 3 and any additional Food/Ser- vice Item Types that have been added.
Revenue Summary	Event fields included: Client/Organization; Event Number; Event Date; Sales Rep; Guests; Food Total; Beverage Total; Liquor Total;

Default Report Title	Contents
Default Report TitleContentsEquipment Total; Labor Total; Room Total; Other Total; Subtot tuity; Service Charge; Tax; Total; Paid Amount; Balance; Cos' Guest Sub-event fields included: Description; Start Time; Er 	
General Details	Client/Organization; Event Number; Event Date; Telephone; Booking Contact; Site Contact; Sales Rep; Theme; Guests
Default Report TitleContentsEquipment Total; Labor Total; Room Total; Other Total; Subt tuity; Service Charge; Tax; Total; Paid Amount; Balance; Cc Guest Sub-event fields included: Description; Start Time; ! Venue; Guests; Members; Non-MembersGeneral DetailsClient/Organization; Event Number; Event Date; Telephor Contact; Site Contact; Sales Rep; Theme; GuestsEvent Spe- 	Client/Organization; Event Number; Event Date; Sales Rep; Booked Date; Revised Date; Definite Date; Cancelled Date; Contract Date; BEO Date; Invoice Date; Next Deposit Date
Include Sub-Events	Same as General Details, above, plus: Sub-Event Description; Sub- Event Guests; Start Time; End Time; Venue
Extended Details	Client/Organization; Event Number; Event Date; Telephone; Fax Num- ber; Booking Contact; Site Contact; Sales Rep; Theme; Reference; Cat- egory; Folio #; Guests

# **Generating Event Prints**

You can highlight one, several, or all events listed in your results grid and generate contracts, invoices, and other event prints for those parties. You can even generate multiple prints for multiple events, with a single mouse click!

#### Generating a Print for Multiple Events

- 1. Generate a query, such as an Event Query or Current Events Query.
- From the query results, select multiple events by holding down your [Shift] or [Ctrl] key while selecting.
   Note: The [Ctrl] key lets you select individual records; the [Shift] key selects two records and all others in-between them.
- Click the top half of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.
   *Result:* The Select Desired Print window opens, where you can select your prints from a floating window.
- 4. Select the **Prints**, **Sub-Prints**, **Documents**, or **Labels** tab. *Note: Batch printing is not available for reports*.
- 5. Click on a print title.
- 6. Click the **Print** button at the bottom right-hand side of the window. *Result:* A confirmation prompt appears.
- Click Yes. *Result:* One print for each of the selected events will be automatically sent to your printer. *Note:* Batch prints do not generate a Print Preview; they are sent to your printer automatically.

	~ ·	-0 1				·			
lter			Select Desire	ed Print	×				1.
Filter AND applies to the main query		AND applies to the main query     Status like Definite							
Click h	ere to add a new i	e to add a new condition Reports Invoice							1
			Prints	Invoice Detailed					
				Contract with Images					
Event Date Range: 5/1/2016 - 5/31/2016)		Subprints	Contract					1	
		Documents	Kitchen Detail						
lesults			Labels	Chef's Copy					
Event #	Event Date	Chattur	<b>Y</b>	Contract with Staffing		ny Cha	Tax	Total	1
E00445	5/1/2016	Definite		Contract - (Narrative)		\$115.12	\$50.36	\$884.06	ľ
E00378	5/2/2016	Definite		BEO		\$265.08	\$129.97	\$2 251 80	l
E00257	5/3/2016	Definite		Dual Column Contract		\$103.80	\$46.81	\$819.36	
E00323	5/3/2016	Definite		Custom Print		\$229.92	\$114.59	\$1,981,51	1
E00111	5/4/2016	Definite		Contrat en Francais		\$1,787,20	\$781.90	\$14.039.10	1
E00388	5/7/2016	Definite		Offsite Contract		\$194.53	\$85.11	\$1,495.44	
E00184	5/11/2016	Definite				\$1,104.72	\$483.32	\$8,492.54	ľ
E00371	5/12/2016	Definite				\$572.08	\$250.29	\$4,747.87	1
E00329	5/13/2016	Definite				\$457.60	\$222.60	\$3,860.20	1
E00286	5/13/2016	Definite				\$398.80	\$174.83	\$3,146.13	1
E00420	5/16/2016	Definite				\$344.86	\$150.88	\$2,651.14	1
E00356	5/24/2016	Definite				\$513.86	\$230.07	\$4,180.58	
E00226	5/25/2016	Definite	1			\$2,093.99	\$916.13	\$16,097.60	
			Close After	Print	Close				

#### **Generating Multiple Prints for Multiple Events**

 Select an event from your results screen, or hold your [Shift] or [Ctrl] key down to select multiple records. *Note: The [Ctrl] key lets you select individual records; the [Shift] key*

selects two records and all others in-between them.

- Click the top half of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.
   *Result:* The Select Desired Print window opens, where you can select your prints from a floating window.
- 3. Click the **Multiple** button, located on the top right-hand side of the window. *Result:* A new panel opens along the right-hand side of the Select Desired *Print window.*
- 4. Select the **Prints**, **Subprints**, **Documents**, or **Labels** tab. *Note: Multiple printing is not available (and not necessary) for reports.*
- 5. Click on a print title.
- 6. Click the right-arrow button , located in the middle of the Select Desired Print window. *Result:* Your selected print title is moved to the panel on the right-hand side of the window.
- 7. Repeat for other desired prints.

- 8. Type, into the field on the right-hand side of the pane, the number of prints you would like to generate for each print.
- 9. Click the **Print** button at the bottom right-hand side of the window. *Result: Multiple prints for each of the selected events will automatically be sent to your printer.*

*Note: Multiple prints do not generate a Print Preview; they are sent to your printer automatically.* 

		+ Multiple		Custom:	🔊 Multiple	Prints
Reports	Invoice			Contract		1
Prints	Invoice Detailed			Invoice		1
Subprints	Contract with Images Contract					
Documents	Chef's Copy					
Labels	Contract with Staffing     Contract - (Narrative)     BEO     Dual Column Contract     Custom Print     Contrat en Francais     Offsite Contract		•			

#### **Creating Custom Multiple Print Lists**

Once you have established a list of multiple prints to generate, you can save that list for future use. For example, you can create a custom list of multiple prints called "Back-of-House Prints," which might consist of kitchen prints, ingredients lists, required items lists, etc., and then retrieve that list, with a single mouse click.

- 1. Follow the steps in the section above to select multiple prints to be generated.
- 2. Click the **Multiple Prints** button, located at the top right of the Select Desired Print window.
- 3. Choose **Custom.** *Result:* The Custom Multiple Prints window opens.

**Tip:** If you want all users on your Caterease network to have access to your custom print list, click the **Shared** button at the bottom of the window. Local **(User)** print lists are only accessible on the computer from which they are created. (Professional Version.)

- 4. **[Optional]** Click the **Shared** button, located at the bottom of the Custom Multiple Prints window, if you want this custom prints list to be shared with other users on your Caterease network. (Available in the Professional Version of Caterease.)
- Click the Add Multiple Prints
   *Result:* A line, titled "New Multiple Prints," is added to the list.
- 6. Type the name of your multiple prints list over the words "New Multiple Prints."
- 7. Click the Save Current Multiple Prints List button
- 8. Close the Custom Multiple Prints window by clicking the *inclusion*, located on the top right-hand corner of the window.

Custom Multiple Prints	×
<b>⊕ ⊖</b> 🖽 ×	Apply Prints
Back-of-House Prints	
▶ Kitchen	
🔒 User 🖉 Shared	
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# **Running an Accounts Receivable Query**

While the Current Events query will quickly track all of your upcoming events, the Accounts Receivable query will track all events with a date that has passed and a balance still outstanding. You can choose to look at only those events that are 30 days out, 60 days out, etc.

#### **Running an Accounts Receivable Query**

- 1. Click the button labeled Accounts Receivable in the Tools sidebar group. *Result: The Accounts Receivable Base Query window opens.*
- 2. Click the down arrow under **Days Out** and set a range for your query (Over 30; Over 60; Over 90; Over 120; 31-60; 61-90; 91-120).

Accounts Receivable Base Query	x
Set Parameters	
Options	
Days Out	
Total Accounts Receivable	~
Exclude Events With Very Small Balances	
Remote Data	
Include Remote Data	
Don't Show Window	OK <u>C</u> ancel

- 3. Optionally click into the checkbox to the left of the **Exclude Events With Very Small Balances** field if you would like to exclude events with a balance of less than five cents.
- 4. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.
- 5. Click **OK** to generate the query. *Result:* A results grid displays, listing all events in your database for which you are owed money, within the parameters you have set.

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Filter AN	D applies to the	main querv							
Click have a		liation of the							
LICK HEIE U	o add a new cond	ition							
otal Accou	ints Receivable)								
esults									
Event #	Event Date 🔺	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total	^
E00385	4/2/2016	Definite	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36	
E00410	4/3/2016	Closed	Bass Inc.	Kathy Wilson	\$1,644.00	\$263.04	\$115.08	\$2,022.12	
E00438	4/6/2016	Definite	North Naples Dart League	John Smith	\$2,081.50	\$333.04	\$145.71	\$2,560.25	
E00027	4/7/2016	Closed	Glessing Wedding	Kathy Wilson	\$4,314.50	\$690.32	\$302.02	\$5,306.84	
E00425	4/9/2016	Definite	Lutheran Marriage Encounter	Jo Ann Mulnix	\$807.00	\$129.12	\$56.49	\$992.61	
E00441	4/13/2016	Definite	Professional Development Inst	Jo Ann Mulnix	\$772.50	\$123.60	\$54.08	\$950.18	
E00386	4/16/2016	Definite	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36	
E00400	4/16/2016	Definite	Wiggins, Goodlette & Davis P.	John Smith	\$300.50	\$48.08	\$21.04	\$369.62	
E00373	4/17/2016	Definite	MSUS/PALS	Jo Ann Mulnix	\$510.75	\$76.44	\$35.76	\$622.95	
E00325	4/18/2016	Definite	Cruises & Vacations, Inc.	John Smith	\$1,193.50	\$178.96	\$78.29	\$1,450.75	
E00369	4/18/2016	Definite	David Ames & Associates	Roxanne M. Mc I	\$239.25	\$23.08	\$11.50	\$273.83	
E00298	4/20/2016	Cancelled	Greg's Soccer Team	Kathy Wilson	\$1,158.50	\$185.36	\$81.11	\$1,424.97	
E00442	4/20/2016	Definite	Robert Hamilton Company	Kathy Wilson	\$526.00	\$84.16	\$36.82	\$646.98	
E00443	4/21/2016	Definite	Solid Rock Church - Womens	Jo Ann Mulnix	\$2,805.00	\$352.80	\$154.35	\$3,312.15	
E00452	4/22/2016	Definite	American Family Insurance	Jo Ann Mulnix	\$620.00	\$86.40	\$38.15	\$744.55	
	4/23/2016	Definite	Diebold Company	Jo Ann Mulnix	\$2,727.00	\$412.32	\$180.40	\$3,319.72	
E00344				In Ann Mulais	\$1.057.00	6160.10	672.00	\$1,200,11	
E00344 E00315	4/23/2016	Definite	Lutheran Marriage Encounter	Jo Ann Wulnix	\$1,057.00	\$109.12	\$73.99	\$1,500.11	



# Customizing the Results Grid

## Unit 2: Customizing the Results Grid

Caterease grids offer unprecedented flexibility! These powerful tools let you look at any information you're interested in seeing. You can customize the columns displayed on a grid; sort or group the grid data by any detail; create footers to show sub-totals for each of your groupings; and then print or export the grid that you have created. You can even save your custom grid layouts for future use, making a limitless number of custom displays just a mouse click away!

#### **Objectives:**

Upon completing this unit, you will be able to:

- Customize the results grid to show the columns of information you want to see.
- Sort the data in the grid by any detail.
- Group the data in the grid by any detail.
- Save your custom grid views for future use.
- Filter records from the grid that you temporarily don't want to see.
- Save your custom filters for future use.
- Create a custom layout, which includes both grid views and filters.
- Use the Find panel to search for any detail.
- Enable any text field as an optional Preview field.
- Print the detail grid as a custom report.
- Export your grid data for use in another software program.

#### **Customizing Grid Columns**

 At the top left corner of a detail grid, click the Quick Column Customizing button .

**Result:** A drop-down list of optional columns appears.

2. Click into the checkbox next to any column heading to have that column appear in the grid.

Result: Any columns with checks next to them appear in the grid.

*Note:* The *Automatically Set Column Widths* button *integrable*, located on the right-hand side of the grid, is generally enabled by default, meaning that any selected columns will automatically shrink to fit in this window without the

need to scroll horizontally.

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Event # Event	Date 🔺 Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	1	•
Event #	Children	Extra Subtotal	mith	\$2,155.40	\$344.86	\$150.88		١.
Account #	PO #	Extra Grat	Wilson	\$713.75	\$98.20	\$49.97		
Event Date	Folio #	Extra SC	Wilson	\$1,096.67	\$175.47	\$76.76		Ŀ
Month	Food Sub	ExtraTax	ne M. Mc N.	\$3,436,65	\$513.86	\$230.07		
WeekDay	Beverage Sub	Extra Tax A	AGIner	\$5,450.05 \$662.50	\$106.16	CAC AE		
Status	Liquor Sub	Extra Tax B	wilson	3005.30	5100.10	\$40.43		
Party Name	Equipment Sub	CPG Tot	wilson	\$1,090.07	\$1/5.4/	\$76.76		ŀ
Client	Labor Sub	CPG Sub	he M. Mc N	\$3,436.65	\$513.86	\$230.07		
Address	Koom Sub	Delivery Chg	Wilson	\$1,612.95	\$258.07	\$112.91		Ľ
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Postal	Liquor Tot	Booking East	Wilson	\$1,096.67	\$175.47	\$76.76		
County	Equipment Tot	Booking Title	mith	\$697.50	\$111.60	\$48.83		
Country	Labor Tot	Booking Telelpho	ne mith	\$294.50	\$47.12	\$20.62		
Telephone	Room Tot	Booking Cellular	Wilson	\$1.607.05	\$271.67	\$118.87		
Email	Other Tot	Booking Email	Allera	\$1,057.55	6102.56	654.06		
Theme	<ul> <li>Subtotal</li> </ul>	Site Contact	wilson	\$772.25	\$125.50	\$34.00		
Category	Grat	Site Last	Wilson	\$772.25	\$123.56	\$54.06		
Sales Rep	Serv Chg	Site First	Wilson	\$942.32	\$150.77	\$65.97		
Coordinator	First	SiteTitle	Wilson	\$1,096.67	\$175.47	\$76.76		
Reference	Second	Site Telephone	ne M. Mc N	\$5,620.00	\$899.20	\$393.40		
Operation	Third	Site Cellular	Mulnix	\$1,138.75	\$182.20	\$79.72		
Business Type	✓ Tax	Site Email	Wilson	\$538.50	\$86.16	\$37.70		
Pay Method	✓ I otal	Master	he M. Mc N.	\$5,455.00	\$872.80	\$381.85		1
Booked By	Paid     Palance	Primary Site Name	mith	\$294.50	\$47.12	\$20.62		
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Dianned	Drofit	Contract Return D	ate IVI. IVIC IV.	\$314.23	307.08	350.75		
Actual	> % Profit	Contact Type Pref	erence Mulnix	\$2,727.00	\$412.32	5180.40		
Guaranteed	Value	Contact Time Pre	erence	\$1,471.00	\$235.36	\$102.97		
Adults	Base Price Mark	UD Var	Wilson	\$538.50	\$86.16	\$37.70		

3. **[Optional]** Hold your left mouse button down on a column title in the customization window and drag up and down to reposition that column in the list of customization options.

Note: You can also drag column headings left and right in the grid itself.

4. Use these details to sort, group, or filter the grid data as described in the topics below.

#### Sorting Grid Data

- 1. Click on the heading of a column in a grid to sort by that detail. *Result: Records are sorted in ascending order by that detail.*
- 2. **[Optional]** Click on the same column heading again to sort by that detail in descending order.
- [Optional] Hold the [Shift] key down on your keyboard and click a second column heading to sort by an additional detail. *Result: Records are sorted initially by the first detail you selected, then within that group they are sorted by the second detail.*

**Tip:** All grids (beginning with Caterease Version 16) allow for sorting in ascending and descending order.

#### Grouping Grid Data

**Tip:** You can also use the "Group By This Field" option to separate records into groups by merely clicking on a column heading with your right mouse button and choosing **Group By This Field**. 1. From a results grid, click the **Group By Box** button , located at the right of the detail grid.

**Result:** A small pane appears across the top of the detail grid with the words "Drag a column heading here to group by that column."

 Hold your left mouse button down on the heading of any column and drag that heading into the pane at the top of the grid.
 *Result:* Grid data is now separated into groups based on your selection.

*Note:* As an alternative to Steps 1 and 2, you can right-click over a column heading and choose *Group By This Field* (not available in Express).

3. Repeat Steps 1 and 2 to create groups within groups. *Result: Records are grouped initially by the first detail you selected, then within that group they are separated by the second detail.* 

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4. Click the expand button to the left of each group in the grid to display the records in that group.

**Result:** The group opens and displays its records, including optional footers (group subtotals), where applicable.

*Note:* If footers are not visible for each group, click the *Grid Tools* button

, located on the right-hand side of the window, and choose **Show Footer**.

- 5. **[Optional]** Right-click into the footer of any column in the grid, and choose to show a total "Count" for that column, or for financial columns choose to show the sum of all values, the minimum value, the maximum value, or the average value.
- Click the triangle to the left of any expanded group to collapse that group and hide its contents.
   *Result: The group closes and hides its records.*

*Note:* As an option, you can right-click within a grid and select **Expand All** or **Collapse All** to open or close all groups.

 Remove groups by dragging column headings from the "Group By Box" pane back into position among other headings in the grid. *Note:* If you have grouped by multiple details, each group heading must be removed individually.

#### Saving/Loading Custom Grid Views

Once you have established the grid you want (the columns are displayed the way you want, sorted the way you want, grouped the way you want, etc.), you can save that custom grid view for future use. Perhaps every month you're going to want to look at your financial information grouped by sales representative, for example. Create this grid view once, then save it to be retrieved every month, with just the click of a button. Grid views can be saved locally (meaning they will only be available under your log-in credentials) or shared across all Caterease users on your network). Not available in the Express version.

- 1. Establish a custom grid view, as outlined previously.
- 2. Click the **Views** button, located at the top left-hand side of the results grid display.
- 3. Choose **Custom**. *Result:* The Custom Grid Views window opens.
- 4. **[Optional]** Click the **Shared** button at the bottom of the pop-up window if you want this custom filter to be shared with other Caterease users. *Note:* As a default, the **User** button is selected, meaning this new filter will only be available for your use.
- Click the Add Grid View button. *Result:* A new blank line is added to the list. *Note:* You can update an existing grid view by right-clicking on its name in the list and choosing *Apply Grid View*.

6. Type a name for your new grid view into the field provided.

0 🗢   🖰 🗙	Apply Grid View
Full Financials Grouped	by Sales Rep
Average Guest Count by	y Theme
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- 8. When finished, click the 💌 at the top right of the Custom Grid Views window to close it.
- 9. Switch among saved grid filters by clicking the **Views** button at the top of the grid and selecting the name of a previously saved grid view.

#### **Customizing Conditions in a Filter**

- Generate a query, such as an Event Query (Queries sidebar > Event Query).
- Click on the Click here to add a new condition button to add a new condition (search criterion).
   Result: A condition will be added, stating "Event # equals <empty>.
   Note: To remove a condition added by mistake, click the ellipsis button to the left of the condition and select Remove Condition.
- 3. Click on the words **Event** # in the condition and choose any condition from the drop-down list. This will be the first condition you search by.

- 4. Click the **equals**, next to your condition, and choose any comparison option. Comparisons might say "Like," "Between," "In," etc.
- 5. Click **<empty>** in the condition and choose a value for the condition to be compared to.

**Note:** These lists are dynamic. If you are searching by Event Theme, then this list will reflect your quickpick list of themes. If you are searching by date, this list will reflect days or date ranges. If you are searching by financial fields, a window in which you can type specific values will open.

- 6. Add as many query conditions as desired by following Steps 2 5, above. *Note: You can query records that match one condition or another or records that do not match any conditions you set.* )
- 7. When finished adding conditions, click the **Perform Query** button **Second Second Se**

#### **Filtering Grid Data**

Tip: You can establish custom filters by clicking Custom in Step 3, above, and then choosing from comparison phrases such as "equals," "does not equal," "less than," "like," etc. When using "like" to filter for similar records, use "\_" as a wildcard to represent any single character, and "%" to represent any series of characters. Use the conjunctions "And" and "Or" to optionally establish a second custom condition.

1. Float your mouse cursor over any column heading in a grid (without clicking).

**Result:** A down arrow appears at the right of the column heading.

- 2. Click the filter icon at the right of the column heading. *Result: A drop-down list of options appears.*
- 3. Click into the checkbox next to any option in the drop-down list to filter by that detail.

**Result:** The grid updates to show only records matching your selection. **Note:** At the bottom of the grid window, the filter(s) you establish are being

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	Event #	Event Date 🔺	Status	Client	(AID	Sales Ren	° S	ubtotal	Serv Chg	Tax	Total	
	E00470	6/9/2016	Tentative	Naples Dental Asso	(All) (Curto			\$538.50	\$86.16	\$37.70	\$662.36	
	E00390	6/11/2016	Tentative	Naples Dental Asso		Mulniv		\$538.50	\$86.16	\$37.70	\$662.36	5
	E00004	6/22/2016	Definite	Greg's Soccer Team		mith		\$1,471.00	\$235.36	\$102.97	\$1,809.33	
	E00391	6/25/2016	Tentative	Naples Dental Asso	Kathy	Wilson		\$538.50	\$86.16	\$37.70	\$662.36	1
	E00336	7/19/2016	Tentative	Ladtech	Roxani	ne M. Mc Namer		\$892.50	\$126.80	\$62.48	\$1,081.78	
	E00198	7/26/2016	Tentative	USA Cup		Kathy Wilson		\$2,407.50	\$382.32	\$238.95	\$3,028.77	
	E00338	8/6/2016	Tentative	Microtech Hearing	Inst.	Kathy Wilson		\$324.50	\$31.92	\$22.72	\$379.14	ł
	E00304	8/23/2016	Definite	Robert Hamilton Co	ompany	Kathy Wilson		\$886.00	\$141.76	\$62.02	\$1,089.78	

stored temporarily while the grid remains open.

- 4. Repeat Steps 1-3 to filter by additional details as desired.
- 5. Restore previous filters from this grid session by clicking the filter icon to the right of the filter details (bottom left corner of the grid) and choosing a different filter from the list.

*Note:* This list saves filters you have established in this one session of the grid only. See "Saving/Loading Custom Filters," for information on creating a list of saved filters for frequent use.

6. [Optional] Remove the current filter by clicking the X to the left of the filter

name or by clicking the **Clear Query Criteria & Results** button \_\_\_\_\_, located on the upper right-hand side of the window.

#### Saving/Loading Custom Filters

- 1. Filter the grid data as described above.
- 2. Click the Filters button at the top of the grid window.

3. Click Custom.

**Result:** The Custom Filters window opens.

Custom Filters	x
<b>○ ● 🗄 ×</b>	Apply Filter
Kathy Wilson's Events	
Definites Only	
* Large Events (Greater than \$2,000)	
🔒 User 🖉 Shared	Customize

- 4. **[Optional]** Click the **Shared** button at the bottom of the pop-up window if you want this custom filter to be shared with other Caterease users. *Note: As a default, the* **User** *button is selected, meaning this new filter will only be available for your use.*
- 5. Click the Add Filter button at the top left of the pop-up window. *Result:* A new blank line is added to the list. *Note:* You can update an existing filter by right-clicking on its name in the list and choosing Apply Filter.
- 6. Type a name for your new filter.
- 7. Click the Save Current Filter button
- 8. When finished, click the 💌 at the top right of the Custom Filters window to close it.
- 9. Switch among saved grid filters by clicking the **Filters** button at the top of the grid and selecting the name of a previously saved filter.

#### Tip: Select a custom layout on-the-fly by clicking the Layouts button at the top of the window and selecting a layout name. (Multiple layouts are not available in Express). If you want to retrieve custom window size and position settings, custom grid views or custom tool bar settings with your saved layout, select those options first (Layouts > Include) before selecting your custom layout. If you want this new layout to serve as the default look for the program, you must click the Save Window Settings button at the top right of the window. If you want this to be the new default look for all users on your network, click the Settings button at the top right and choose Shared > Save Current Window.

#### Saving Custom Layouts

- 1. Customize the results grid based on the topics above.
- 2. Click the Layout button at the top left of grid and choose Custom. *Result: The Custom Layouts window opens.*

Custom	Layouts	×
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- 3. **[Optional]** Click the **Shared** button at the bottom left of the window if you want your new layout to be available to all users on your Caterease network. *Note: User layouts are only available to you as a user (from any computer).*
- 4. Click the Add Layout button , at the top left of the window. *Result:* A new line is added to the window with the default name of "New Layout."

*Note:* You can update an existing layout on the list to show your current screen display by right-clicking on the layout name and choosing *Apply Layout*.

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

#### **Using the Find Panel**

All queries now have an optional Find panel (Available in Version 16, Professional Version).

*Tip:* Prior to utilizing the Find panel, ensure you have customized your grid to display the desired columns, as only visible fields can be searched.

1. Click the **Grid Tools** button , located on the right-hand side of the detail grid.

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Custom: 🐺 Views 🕶 🍸 Filt	ers 🕶 🦙 Layout 🕶				🎛 🖹 Char	t By Category	~	<del></del> -			
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* Client 🔺	Address	City	St/Prov	Postal	Reference	Description	Sales Rep		<b>H</b>		
<ul> <li>Acoustics Associates</li> </ul>	1661 Estero Blvd	Ft. Myers	FL	33931	Referral	Association Mer	Jane Becker				
Aid Association for Lutheran	4900 N Hwy 169 #308	Ft. Myers	FL	55428	Yellow Pages	Association Mer	John Smith				
Amateur Athletic Union	4921 Winchester Road	Ft. Myers	FL	38118	Refferal	Association Mer	Jane Becker		Q		
American Family Insurance	6900 Wedgewood Rd.	Ft. Myers	FL	55459	Cold Contact	Association Mer	Roxanne M. Mc				
Bass Inc.	10 Thompson Street	Ft. Myers	FL	55459	Walk In	Repeat Client	Jane Becker		-		
CAM/USON Company	322 West State Street	Naples	FL	34102	Yellow Pages	VIP	Roxanne M. Mc		щ,		
Chamber of Commerce	10550 Wayzata Blvd.	Ft. Myers	FL	55305	Mailing	Associations	lane Becker		-		
Collier County Bank	1151 Rt. 951	Naples	FL	34110	Yellow Pages	Repeat C 🗸	Visible			82	Find Panel
Crow Wedding Reception	6460 Sanibel Captiva Rd	Sanibel	FL	33957	Walk In	VIP	Invisible			7	Show Filter Row
Cruises & Vacations, Inc.	5001 W 80Th St. #565	Ft. Myers	FL	55347	Referral	Repeat C	On Domand (Ctd	Ð	-	_	a
David Ames & Associates	13911 Ridgedale Drive Suite 2	Ft. Myers	FL	55305	Mailing	Chambe	Cir Demand (Ctri	-1)	_	-	Show Footer
Diebold Co.	1063 10th Ave SE	Ft. Myers	FL	55414						36	Show Navigation Bar
Diebold Company	1063 10th Ave SE	Ft. Myers	FL	55414	Yellow Pages	Chamber Memb	Kathi Cleath			-1	Incremental Searching
Ducks Unlimited	18543 83rd Ave. N.	Ft. Myers	FL	55313	Cold Contact	Association Mer	Jo Ann Mulnix				
Dvorak Reception	3976 N. Orchid Lane	Naples	FL	34109	Yellow Pages	Repeat Client	Jo Ann Mulnix	$\checkmark$		-	Preview Field
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2. Choose Visible or On Demand.

Note: "Invisible" is the default.

- If "Visible" is selected, the Find panel will display on your screen.
- If "On Demand" is selected, the panel will become visible when the [Ctrl] key and the F key are pressed simultaneously.
- 3. Simply begin typing the name of item you are searching for into the field provided and you will be incrementally scrolled to possible matches.

#### **Using the Preview Field**

You can choose any text field as an optional Preview Field (for Notes, Comments, Allergy Information, Modifications, for example), in any of your query grids. (Available in Version 16, Professional Version).

- Click the Grid Tools button , located on the right-hand side of the detail grid.
- 2. Click the **Preview Field** button to expand your list of available fields.
- 3. Click on the desired option.

**Result:** The grid will instantly display the text associated with the field you specified.

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Click here to ad	d a new condition									
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Event #	Item Name	Prep Area	Sales Rep	Category	Price	Oty	Total	^ 🕤		
E00380	Stuffed Mushrooms	Kitchen	Roxanne M. Mc N	Hors D'oeuvres	\$50.00	3	\$150.00	•		
Stuffed M	lushrooms - per 50							**		
Baked mu	ushroom caps filled with a deliciou	s crabmeat mi	cture. Served hot with	lemon wedges.						
F00380	Chicken Drummetter	Kitchen	Royanne M. Mc N	Hors D'oeuvres	\$50.00	2	\$100.00			
Chicken	Drummettes - per 50		novanie in ne n	nois b ocurres	000100	~				
Fried and	Battered, Just the Way You Like	Them								
E00380	Faa Rolle	Kitchen	Royanne M. Mc N	Hors D'oeuvres	\$50.00	2	\$100.00			
Faa Rolls	- per 50	Ricchen	Notamie IVI. IVIC IV	Hors D ocuvies	350.00	2	3100.00	100	Σ	Find Panel
Crispy frie	d morsels stuffed with ground bee	ef, cabbage, an	d delicious seasonin	gs.					$\mathbb{V}$	Show Filter Row
E00380	Marinated Herring w/Crackers	Cold Prep	Roxanne M. Mc N	Hors D'oeuvres	\$40.00	3	\$120.00			Show Footer
Marinate	d Herring with Crackers								1	Show Navigation Bar
Try Our N	ew England Herring								-1	Incremental Searching
E00380	Stuffed Celery w/Cream Cheese	Cold Prep	Roxanne M. Mc N	Hors D'oeuvres	\$40.00	2 🖌	Description			Dreview Field
Stuffed C Fresh Cel	elery w/Cream Cheese - per 50 erv and Philadelphia Cheese					ľ	Instructions			. renew rich
≪	06 ⊧ ⊮ ⊮ * '* <						Label			
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#### **Exporting Grid Data**

- 1. Click your right mouse button anywhere within a results grid. *Result:* A pop-up menu appears.
- 2. Select Export Data. *Result:* A sub-menu appears.
- Choose a format for your export: Excel Spreadsheet, Text File, HTML File, XML File or Adobe Acrobat File (.pdf).
   *Result:* A window appears for you to type a name for your export file.
   *Note:* Certain grids also allow export to Constant Contact or Exact Target (if

you own the interface with those services).

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E00473	6/1/2016		Centative	lacor	Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05	
E00380	6/3 🕏	Select		,	n Corporation	Roxanne M. Mc M	\$5,620.00	\$899.20	\$393.40	\$6,912.60	Ē
E00382	6/4	Expand	IIA E		s City Police Departmen	Jo Ann Mulnix	\$1,138.75	\$182.20	\$79.72	\$1,400.67	
E00470	6/9	Collan	se All		is Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36	
E00390	6/1	conap			is Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36	17
E00464	6/1	Clear C	Column Sorting		Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05	1
E00384	6/1	Select	All Records		ha White	Roxanne M. Mc M	\$5,455.00	\$872.80	\$381.85	\$6,709.65	
E00403	6/1				ins, Goodlette & Davis P.	John Smith	\$294.50	\$47.12	\$20.62	\$362.24	
E00417	6/1	Clear S	elected Records		Ames & Associates	Roxanne M. Mc M	\$514.25	\$67.08	\$30.75	\$612.08	
E00418	6/1	Show F	Footer		Id Company	Jo Ann Mulnix	\$2,727.00	\$412.32	\$180.40	\$3,319.72	
E00004	6/2	Show	Navigation Bar		s Soccer Team	Kathy Wilson	\$1,471.00	\$235.36	\$102.97	\$1,809.33	
	6/2				is Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36	
E00391	7/9 🖄	Color (	Grid	•	t Technologies	John Smith	\$294.50	\$47.12	\$20.62	\$362.24	
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4. Enter a name for the exported file. Note the directory in which the file is being saved.

*Note:* You can easily change the export directory by clicking the down arrow next to the <u>Save In</u> field at the top of the window and selecting another directory.

5. Click Save.

**Result:** A prompt will appear, and your export file has been created. **Note:** If you have the Professional version of Caterease, this prompt will offer to open your export file for you automatically. If you have the Standard or Express version, you will need to open a third-party application on your own and seek out the export file.

#### **Printing Grids**

1. Customize the detail grid as described in topics above.

**Tip:** You can optionally scale the size of text on your grid print to have it better fit on the page.

 Click the Print Grid button , located on the right-hand side of the grid. *Result: A preview of the grid print displays.*

œ						Current Events Q	uery - Print Previ	ew					×
Previ	ew												
Print	Export To PDF	Page Set <u>up</u>	Format	Background Format	Eit to Page Width	Email Whole Pages Pages - Tools Zoom		Navigatio	Navigation	Thumbr	ails ⊻iew	Settings Windows	
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			Event #	Event Date	Status	Client	Sales Rep 🔺	Subtotal	Serv Chg	Tax	Total		
			🖃 Sale	s Rep : Jo Ann M	lulnix								
			E00008	8/27/2016	Tentative	Horizon Business Services	Jo Ann Mulnix	\$3,653.00	\$584.48	\$255.71	\$4,493.19		
			E00382	6/4/2016	Tentative	Naples City Police Departm	Jo Ann Mulnix	\$1,138.75	\$182.20	\$79.72	\$1,400.67		
			E00418	6/19/2016	Tentative	Diebold Company	Jo Ann Mulnix	\$2,727.00	\$412.32	\$180.40	\$3,319.72		
			Cnt: 3					7,518.75	1,179.00	515.83	9,213.58		
			🖃 Sale	s Rep : John Smi	th								
			E00393	7/30/2016	Tentative	Wiggins, Goodlette & Davis	John Smith	\$294.50	\$47.12	\$20.62	\$362.24		
			E00403	6/18/2016	Tentative	Wiggins, Goodlette & Davis	John Smith	\$294.50	\$47.12	\$20.62	\$362.24		
			E00404	7/9/2016	Tentative	Sunset Technologies	John Smith	\$294.50	\$47.12	\$20.62	\$362.24		
			E00415	7/18/2016	Tentative	Cruises & Vacations, Inc.	John Smith	\$2,213.50	\$342.16	\$149.69	\$2,705.35		
			E00464	6/12/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05		
			E00467	7/14/2016	Tentative	Amateur Athletic Union	John Smith	\$533.00	\$78.08	\$37.31	\$648.39		
			E00468	7/14/2016	Tentative	Amateur Athletic Union	John Smith	\$533.00	\$78.08	\$37.31	\$648.39		
			E00473	6/1/2016	Tentative	Jason Becker	John Smith	\$1,535.00	\$245.60	\$107.45	\$1,888.05		
			Cnt: 8					7,233.00	1,130.88	501.07	8,864.95		
			∃ Sale	s Rep : Kathy Wi	lson								
			E00336	7/19/2016	Tentative	Ladtech	Kathy Wilson	\$892.50	\$126.80	\$62.48	\$1,081.78		
			E00338	8/6/2016	Tentative	Microtech Hearing Inst.	Kathy Wilson	\$324.50	\$31.92	\$22.72	\$379.14		
			E00304	8/23/2016	Definite	Robert Hamilton Company	Kathy Wilson	\$886.00	\$141.76	\$62.02	\$1,089.78		
			E00198	7/26/2016	Tentative	USA Cup	Kathy Wilson	\$2,407.50	\$382.32	\$238.95	\$3,028.77		
			E00004	6/22/2016	Definite	Greg's Soccer Team	Kathy Wilson	\$1,471.00	\$235.36	\$102.97	\$1,809.33		
			E00390	6/11/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36		
			E00391	6/25/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36		
			E00470	6/9/2016	Tentative	Naples Dental Assoc.	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36		
			Cnt: 8					7 597 00	1 176 64	602.24	9 375 88		

- 3. **[Optional]** On the print preview screen, click the **Page Setup** button to adjust paper size/orientation, margin sizes, header/footer or to scale the size of the printed text (to prevent words or columns from cutting off) or the **Format** button to format title, footnotes, page numbering, or date and time.
- Click the **Print** button at the top left of the print preview window to send the grid print to your printer.
   *Note:* As an alternative, you can click the **Export to PDF** button to save the grid print as a PDF file.
- 5. When finished, close the print preview window.

# Viewing Grid Results in a Chart or Graph

In addition to displaying results of your Caterease queries in a detail grid, the Professional version of the program lets you view these results in a graphic chart view, showing you information in a bar graph format, or pie chart, or line graph, etc. You can control what detail the records are charted or graphed by, and you can even add additional information (such as cost, profit, etc.), to the charts. These options are perfect for quick reference or for presentation purposes.

#### Viewing Grid Results in a Chart

- Click the Chart View button , located at the top right-hand side of a query results grid. *Result: The grid display changes to a chart.*
- [Optional] Click the down arrow to the right of Chart By (top of display) to choose a different criterion on which to base your chart. *Result: The chart updates to reflect your changes.*

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siness Type)	Catering Delicatessen Drop-Off Full Service	1,495.44	4,684.50	Events	22,311.	57		Catering Delicatessen Drop-Off	
by Business Type)	Catering Delicatessen Drop-Off Full Service Group Booking	1,495.44 1,943.70	4,684.50	Events	22,311.	57	30,330.12	Catering Delicatessen Drop-Off Full Service	
(by Business Type)	Catering Delicatessen Drop-Off Full Service Group Booking On-Premise	1,495.44 1,943.70 2,745	4,684.50	Events	22,311.	57	30,330.12	Catering Delicatessen Drop-Off Full Service Group Booki On-Premise	ng
(by Business Type)	Catering Delicatessen Drop-Off Full Service Group Booking On-Premise	1,495,44 1,943,7( 2,745	4,684.50 98	Events	22,311.	57	30,330.12	Catering Delicatessen Drop-Off Full Service Group Booki On-Premise Restaurant	ng
(by Business Type)	Catering Delicatessen Drop-Off Full Service Group Booking On-Premise Restaurant	1,495,44 1,943.70 2,745	4,684.50 98 4,838.10	Events	22,311.	57	30,330.12	Catering Delicatessen Drop-Off Full Service Group Booki On-Premise Restaurant	ng

#### Switching Chart Types

1. Click **Bar Diagram** at the top right of the chart. *Result:* A drop-down list of chart options appears.

2. Click a different chart type to select it.

		Cush	omize Chart
		Events	Area diagram
	Catering	5,432.90	Ear diagram
	Delicatessen	4,072.42	Column diagram
1	Drop-Off	15,299.22	Eine diagram
See.	Full Service		5,080.88 🕜 Pie diagram
2	Group Booking	20,789-52	Stacked Area diagram
	On-Premise	5,178.02	Stacked Bars diagram
	Restaurant	4322.54	Stacked Columns die

#### **Customizing the Chart**

- 1. Click **Customize Chart** at the top right-hand side of the chart. *Result:* A Customization window opens.
- 2. Set optional settings on the **Series** and **Options** tabs by clicking the radio buttons.

Customization ×
Series Options          Number Of Events         Total Value         Total Cost         Total Profit         Total Paid
Sort by:

3. Click the x at the top right-hand corner of the Customization window to close it.



# Creating a Custom Event Query

# Unit 3: Creating a Custom Event Query

The Event Query is perhaps the most popular and most powerful query tool Caterease has to offer. Using this feature, you can search through your entire database of events and find only those records that match certain conditions you set. For example, you could search only those events that take place during a certain date range, or only those events with a certain theme, or only those events with a certain sales representative. You could also search for only those events that take place during a certain date range and have a certain theme and a certain sales representative. Any information you need is available at your fingertips.

#### Objectives:

Upon completing this unit, you will be able to:

- Track all events in your program based on any search conditions.
- Add multiple query conditions.
- Use relative date ranges to query events.
- Set conditions for your query.
- Save custom queries for future use.

# **Querying Events**

#### Running an Event Query

1. Click the **Queries** sidebar on the left-hand side of the screen.

**Tip:** As an option, click the checkbox labeled **Don't Show Window** at the bottom left of the tool to have the Event Query open automatically as soon as your results are generated.

- 2. Click the **Event Query** button.
  - Result: The Event Base Query window opens.

Event Base Query	×
Set Parameters	
Date Range	
<ul> <li>Less Than Or Equal To</li> <li>Greater Than Or Equal To</li> </ul>	7/1/2016 v thru 7/31/2016 v
<ul> <li>Within Date Range</li> <li>Relative Date Range</li> </ul>	This month 🗸
Query Options	
Exclude Status	
None selected	~
Remote Data	
Include Remote Data	
Don't Show Window	OK <u>C</u> ancel

- 3. Set a **Date Range** for your query by choosing the option **Less Than or Equal To, Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query.
- 4. Optionally exclude any statuses by selecting an option from the drop-down list to the right of the <u>Exclude Status</u> field.
- 5. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.
- 6. Click **OK**. *Result: The Event Query is generated.*

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vent Date	Range: 5/1/2016 -	5/31/2016)							
lesults —									
Event #	Event Date 🔺	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total	^
E00445	5/1/2016	Definite	NACM	John Smith	\$719.48	\$115.12	\$50.36	\$884.96	
E00378	5/2/2016	Definite	Gustave A. Larson Company	Roxanne M. Mc I	\$1,856.75	\$265.08	\$129.97	\$2,251.80	
E00460	5/2/2016	Tentative	Bass Inc.	John Smith	\$0.00	\$0.00	\$0.00	\$0.00	
500057	E /2 /2016	Closed	Acoustics Accosistor	John Smith	1000 70	04.00.00	A 1 5 04	004.0.00	
E00257	3/3/2010	ciosea	ACOUSTICS ASSOCIATES	John Smith	3000.73	\$103.80	\$46.81	\$819.36	
E00257 E00379	5/3/2016	Closed	Gustave A. Larson Company	Roxanne M. Mc N	\$1,950.75	\$103.80 \$306.52	\$46.81 \$136.55	\$819.36 \$2,393.82	
E00257 E00379 E00323	5/3/2016 5/3/2016	Closed Definite	Gustave A. Larson Company P S S	Roxanne M. Mc N Kathy Wilson	\$1,950.75 \$1,637.00	\$306.52 \$229.92	\$46.81 \$136.55 \$114.59	\$2,393.82 \$1,981.51	
E00257 E00379 E00323 E00111	5/3/2016 5/3/2016 5/3/2016 5/4/2016	Closed Definite Definite	Gustave A. Larson Company P S S Crow Wedding Reception	Roxanne M. Mc N Kathy Wilson Jo Ann Mulnix	\$1,950.75 \$1,637.00 \$11,470.00	\$103.80 \$306.52 \$229.92 \$1,787.20	\$46.81 \$136.55 \$114.59 \$781.90	\$2,393.82 \$1,981.51 \$14,039.10	
E00257 E00379 E00323 E00111 E00388	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/7/2016	Closed Definite Definite Definite	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc.	Roxanne M. Mc t Kathy Wilson Jo Ann Mulnix Kathy Wilson	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53	\$46.81 \$136.55 \$114.59 \$781.90 \$85.11	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44	
E00257 E00379 E00323 E00111 E00388 E00401	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/7/2016 5/7/2016	Closed Definite Definite Definite Tentative	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P.	Roxanne M. Mc ľ Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80 \$467.45	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79	\$46.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97	
E00237 E00379 E00323 E00111 E00388 E00401 E00381	5/3/2016 5/3/2016 5/4/2016 5/7/2016 5/7/2016 5/9/2016	Closed Definite Definite Definite Tentative Prospective	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U.	Roxanne M. Mc ř Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith John Smith	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80 \$467.45 \$2,160.50	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68	\$46.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42	
E00237 E00379 E00323 E00111 E00388 E00401 E00381 E00381	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/7/2016 5/7/2016 5/9/2016 5/11/2016	Closed Definite Definite Definite Tentative Prospective Definite	Coustis Associates Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U. Salassa/Lau Wedding Receptic	Roxanne M. Mc f Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith John Smith Roxanne M. Mc f	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80 \$467.45 \$2,160.50 \$6,904.50	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68 \$1,104.72	\$46.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24 \$483.32	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42 \$8,492.54	
E00257 E00379 E00323 E00111 E00388 E00401 E00381 E00381 E00184 E00371	5/3/2016 5/3/2016 5/4/2016 5/7/2016 5/7/2016 5/9/2016 5/11/2016 5/12/2016	Closed Definite Definite Definite Tentative Prospective Definite Definite	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U. Salassa/Lau Wedding Receptic Dvorak Reception	Roxanne M. Mc f Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith John Smith Roxanne M. Mc f Roxanne M. Mc f	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80 \$467.45 \$2,160.50 \$6,904.50 \$3,925.50	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68 \$1,104.72 \$572.08	\$46.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24 \$483.32 \$250.29	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42 \$8,492.54 \$4,747.87	
E00237 E00379 E00323 E00111 E00388 E00401 E00381 E00184 E00371 E00458	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/7/2016 5/7/2016 5/9/2016 5/11/2016 5/12/2016	Closed Definite Definite Definite Tentative Prospective Definite Definite Tentative	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U. Salassa/Lau Wedding Receptio Dvorak Reception Sunset Technologies	Roxanne M. Mc ľ Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith John Smith Roxanne M. Mc ľ Kathy Wilson	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80 \$467.45 \$2,160.50 \$6,904.50 \$3,925.50 \$1,941.00	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68 \$1,104.72 \$572.08 \$278.56	\$46.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24 \$483.32 \$250.29 \$135.87	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42 \$8,492.54 \$4,747.87 \$2,355.43	
E00237 E00379 E00323 E00111 E00388 E00401 E00381 E00184 E00371 E00458 E00329	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/7/2016 5/7/2016 5/1/2016 5/12/2016 5/12/2016 5/13/2016	Closed Definite Definite Definite Tentative Prospective Definite Definite Definite	Counts Associates Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U. Salassa/Lau Wedding Receptic Dvorak Reception Sunset Technologies Aid Association for Lutherans	Roxanne M. Mc f Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith John Smith Roxanne M. Mc f Roxanne M. Mc f	\$1,950.75 \$1,637.00 \$11,470.00 \$1,215.80 \$467.45 \$2,160.50 \$6,904.50 \$3,925.50 \$1,941.00 \$3,180.00	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68 \$1,104.72 \$572.08 \$278.56 \$457.60	\$40.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24 \$483.32 \$250.29 \$135.87 \$222.60	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42 \$8,492.54 \$4,747.87 \$2,355.43 \$3,860.20	
E00257 E00379 E00323 E00111 E00388 E00401 E00381 E00184 E00371 E00458 E00329 E00286	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/1/2016 5/1/2016 5/12/2016 5/12/2016 5/12/2016 5/13/2016	Closed Definite Definite Tentative Prospective Definite Definite Tentative Definite Definite	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U. Salassa/Lau Wedding Receptic Dvorak Reception Sunset Technologies Aid Association for Lutherans American Family Insurance	Roxanne M. Mc ľ Roxanne M. Mc ľ Xathy Wilson John Smith John Smith Roxanne M. Mc ľ Roxanne M. Mc ľ John Smison Roxanne M. Mc ľ John Smith	\$1,637.00 \$1,637.00 \$1,215.80 \$467.45 \$2,160.50 \$5,904.50 \$3,925.50 \$1,941.00 \$3,180.00 \$2,572.50	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68 \$1,104.72 \$572.08 \$278.56 \$457.60 \$398.80	\$40.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24 \$483.32 \$250.29 \$135.87 \$222.60 \$174.83	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42 \$8,492.54 \$4,747.87 \$2,355.43 \$3,860.20 \$3,146.13	-
E00257 E00379 E00323 E00111 E00388 E00401 E00381 E00184 E00371 E00458 E00329 E00286 E00342	5/3/2016 5/3/2016 5/3/2016 5/4/2016 5/1/2016 5/1/2016 5/12/2016 5/12/2016 5/12/2016 5/13/2016 5/13/2016	Closed Definite Definite Tentative Prospective Definite Definite Definite Definite Prospective Prospective	Gustave A. Larson Company P S S Crow Wedding Reception Naples Dental Assoc. Wiggins, Goodlette & Davis P. F.G.C.U. Salassa/Lau Wedding Receptic Dvorak Reception Sunset Technologies Aid Association for Lutherans American Family Insurance CAM/USON Company	Roxanne M. Mc I Kathy Wilson Jo Ann Mulnix Kathy Wilson John Smith Roxanne M. Mc I Roxanne M. Mc I Roxanne M. Mc I Jo Ann Mulnix	\$1,950.75 \$1,637.00 \$1,215.80 \$467.45 \$2,160.50 \$6,904.50 \$3,925.50 \$1,941.00 \$3,180.00 \$2,572.50 \$818.50	\$103.80 \$306.52 \$229.92 \$1,787.20 \$194.53 \$74.79 \$345.68 \$1,104.72 \$572.08 \$278.56 \$457.60 \$398.80 \$105.36	\$40.81 \$136.55 \$114.59 \$781.90 \$85.11 \$32.73 \$151.24 \$483.32 \$250.29 \$135.87 \$222.60 \$174.83 \$52.05	\$819.36 \$2,393.82 \$1,981.51 \$14,039.10 \$1,495.44 \$574.97 \$2,657.42 \$8,492.54 \$4,747.87 \$2,255.43 \$3,860.20 \$3,146.13 \$975.91	-

7. [Optional] If you would like to view sub-event details, click the View

**Details** button [1], located on the right-hand side of your screen. *Result: The Details window opens.* 

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II Alt	tantic Salmon		Dinner	· · · · · · · · · · · · · · · · · · ·	Hot Line	\$34.95	5 20	699	
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1 F	2/201 ood/S Ite IT Fil IT Alt <b>Y</b> Ma <b>X</b> Ma	Z/201     Dinner Server       ood/Service Items     Item Name       Iff     Filet with Balsam       Iff     Altantic Salmon       X     Margarita       If     Wood Grain Pod	2/201     Dinner Served     (c)       ood/Service Items     Staffir       Item Name     Item Vame       If     Filet with Balsamic Glaze       If     Altantic Salmon       X     Margarita       X     Wood Grain Podium	2/201         Dinner Served         05:00 PM           ood/Service Items         Staffing         Item Name         Catego           Item Name         Catego         Dinner         Item Name         Catego           If         Filet with Balsamic Glaze         Dinner         Item Name         Margarita         Beer           Margarita         Beer         Wood Grain Podium         AV Equ         Item Podium         Item Podium	2/201         Dinner Served         05:00 PM         09:00 PM           ood/Service Items         Staffing         Item Name         Category           Item Name         Category         Item Value         Dinner           If         Filet with Balsamic Glaze         Dinner         Margarita           Margarita         Beer         Modern         Vequipment	2/201     Dinner Served     05:00 PM     09:00 PM     40       ood/Service Items     Staffing       Item Name     Category     Prep Area       If     Filet with Balsamic Glaze     Dinner     Kitchen       If     Altantic Salmon     Dinner     Hot Line       Margarita     Beer     Bar       Wood Grain Podium     AV Equipment     Setup	2/201     Dinner Served     05:00 PM     09:00 PM     40     40       ood/Service Items     Staffing       Item Name     Category     Prep Area     Price       If     Filet with Balsamic Glaze     Dinner     Kitchen     \$31.92       If     Altantic Salmon     Dinner     Hot Line     \$34.93       Margarita     Beer     Bar     \$69;       Wood Grain Podium     AV Equipment     Setup     \$25.00	ZZ201         Dinner Served         05:00 PM         09:00 PM         40         40         Sand           ood/Service Items         Staffing	Z/201     Dinner Served     OS:00 PM     09:00 PM     40     40     Sand       ood/Service Items     Staffing       Item Name     Category     Prep Area     Price     Qty     Total       If Filet with Balsamic Glaze     Dinner     Kitchen     S31.95     20     639       If Altantic Salmon     Dinner     Hot Line     S34.95     20     639       If Altantic Salmon     Dinner     Hot Line     S34.95     20     639       If Margaria     Beer     Bar     \$6.95     40     278       If Wood Grain Podium     AV Equipment     Setup     \$25.00     1     25

 [Optional] Click the expand button, located to the left of the field, to drill down to a second grid, which lists sub-event details. Note: This second grid can be manipulated in the same ways as the main grid. Use the **Quick Column Customizing** button to access additional fields.

# **Grouping Query Conditions**

While you can easily create a query to search for records with one quality OR another (for example, events with a theme of "Meeting" OR of "Seminar"), you might want to get a little more creative. For example, what if you want to find events with a theme of "Meeting," but only those belonging to you OR your assistant? Or perhaps you want to find all of your events that took place last summer OR the summer before. Likewise, you may want to apply this same logic to account queries or guestroom queries. In these cases, you will likely need to group your query conditions as described in this topic.

#### **Grouping Query Conditions**

- 1. Create a basic query as desired following the steps outlined previously.
- 2. Click the ellipsis button into the left of one of your query conditions. *Result: A pop-up menu appears.*
- 3. Click Add A New Group.

**Result:** A new group is created with the default first condition of "Event # equals <empty>," and with the statement that "AND" will apply to your new group.

*Note:* If you are performing an Accounts Query, your default first condition will pertain to "Client"; if you are performing a Guestrooms Query, it will pertain to "Arrival" date.

- Click on the word AND in the line "AND applies to the group" at the beginning of your new group.
   *Result:* A drop-down list of options appears.
- 5. Select the desired option: And, Or, Not And, Not Or.

Option	Description
And	This option means the records that result from this query must match the original criteria you set, and all of the criteria you create in this group.
Or	This option means the records that result from this query must match the original criteria you set, and any one of the criteria you set in this group - either the first condition in the group OR the second OR the third, etc.
Not And	This option means the records that result from this query must match the original criteria you set, but not all conditions in this group. They can match one or another, but NOT the first AND the second AND the third, etc.
Not Or	This option means the records that result from this query must match the original criteria you set, but not any of the conditions in this group - NOT the first condition in the group OR the second, etc.

- Click on Event # in the first condition of your new group, and choose any condition from the drop-down list.
   Result: You are establishing the initial criterion for your query.
   Note: If you are performing an Accounts Query, you will click on the word Client; if you are performing a Guestrooms Query, you will click on the word Arrival.
- 7. Click on the word **equals** next to your criterion and choose any option. *Result:* Your selection replaces the word "equals" in your condition.
- 8. Click on the final word in the condition **<empty>**, and choose a value for the condition to be compared to.
- 9. Click on the **Click here to add a new condition** button. *Result: A new default query condition is added to your new group.*
- 10. Repeat Steps 6-8 as necessary to add more conditions to your group.
- 11. Click the **Perform Query** button *(see Section 2019)*, located on the upper right-hand side of the window.

# Changing the Conjunction in a Query

Conjunctions are every bit as important in a Caterease Event Query as they are in everyday language. For example, imagine you wanted to find all events you have with a theme of Meeting **or** Seminar. That is very different from telling the program to find all events with a theme of Meeting **and** Seminar. (Incidentally, the latter would yield no results, since no event can have a theme that is both Meeting and Seminar.) Therefore, as in speaking, you've got to choose the correct conjunction!

#### Changing the Conjunctions in a Query

- Generate a query, such as an Event Query (Queries sidebar > Event Query).
- In the Filter area at the top of the Event Query window, click on the word And in the line AND applies to the main query. *Result:* A drop-down list of options appears.
- 3. Select the desired option for your query.
- 4. Establish your query conditions.

5. Click the **Perform Query** button

Custom: 🐺 Views * 🍸 Filters * 🏷 Layout *	🔠 ᢄ Chart By Business Type	_ ₩- ⊡
Filter		
Filter AND applies to the main query		9
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OR OR		1日
O NOT AND		
O NOT OR		
(Event Date Range: 5/1/2016 - 5/31/2016)		súl

## **Querying Your Customer Database**

In addition to querying events, you may want to query your list of customers as well. For example, you may want to determine how many customers you have who do not have fax numbers on record with you; or how many customers heard of you from a particular reference; or how many customers are corporate clients, as opposed to government or educational entities. Any of these conditions, and more, can be used in your Account Query tool.

#### **Querying Your Customer Database**

1. Click the **Account Query** button from the **Queries** sidebar group. *Result: The Account Base Query window opens.* 

Account Base Query	×
Set Parameters	
Query Options	
Include Accounts With Events Only Only Accounts With All Address Fields Filled	Out
Exclude	
On Hold Accounts	
Don't Show Window	OK Cancel

- 2. Select your base query options:
  - Click into the **Include** checkboxes to include Accounts with Events Only and/or Only Accounts With All Address Fields Filled out.
  - Click into the Exclude checkbox to exclude On Hold Accounts.

#### 3. Click OK.

Result: The Account Query is generated.

Account Query								2
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Click here to add a new condi	tion							
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inly Accounts With All Addre	ss Fields Filled Out)							
Results								
Client 🔺	Address	City	St/Prov	Postal	Reference	Description	Sales Rep	^
Acoustics Associates	1661 Estero Blvd	Ft. Myers	FL	33931	Referral	Association Mer	Jane Becker	
Aid Association for Lutheran	4900 N Hwy 169 #308	Ft. Myers	FL	55428	Yellow Pages	Association Mer	John Smith	
Amateur Athletic Union	4921 Winchester Road	Ft. Myers	FL	38118	Refferal	Association Mer	Jane Becker	
American Family Insurance	6900 Wedgewood Rd.	Ft. Myers	FL	55459	Cold Contact	Association Mer	Roxanne M. Mc	
Bass Inc.	10 Thompson Street	Ft. Myers	FL	55459	Walk In	Repeat Client	Jane Becker	
CAM/USON Company	322 West State Street	Naples	FL	34102	Yellow Pages	VIP	Roxanne M. Mc	
	10550 Wayzata Blvd.	Ft. Myers	FL	55305	Mailing	Associations	Jane Becker	
Chamber of Commerce							12	
Chamber of Commerce Collier County Bank	1151 Rt. 951	Naples	FL	34110	Yellow Pages	Repeat Client	Kathy Wilson	
Chamber of Commerce Collier County Bank Crow Wedding Reception	1151 Rt. 951 6460 Sanibel Captiva Rd	Naples Sanibel	FL FL	34110 33957	Yellow Pages Walk In	Repeat Client VIP	Kathy Wilson Jo Ann Mulnix	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc.	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565	Naples Sanibel Ft. Myers	FL FL FL	34110 33957 55347	Yellow Pages Walk In Referral	Repeat Client VIP Repeat Client	Jo Ann Mulnix Roxanne M. Mc	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc. David Ames & Associates	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565 13911 Ridgedale Drive Suite 2	Naples Sanibel Ft. Myers Ft. Myers	FL FL FL FL	34110 33957 55347 55305	Yellow Pages Walk In Referral Mailing	Repeat Client VIP Repeat Client Chamber Memb	Jo Ann Mulnix Roxanne M. Mc Kathy Wilson	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc. David Ames & Associates Diebold Co.	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565 13911 Ridgedale Drive Suite 2 1063 10th Ave SE	Naples Sanibel Ft. Myers Ft. Myers Ft. Myers	FL FL FL FL FL	34110 33957 55347 55305 55414	Yellow Pages Walk In Referral Mailing	Repeat Client VIP Repeat Client Chamber Memb	Kathy Wilson Jo Ann Mulnix Roxanne M. Mc Kathy Wilson	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc. David Ames & Associates Diebold Co. Diebold Company	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565 13911 Ridgedale Drive Suite 2 1063 10th Ave SE 1063 10th Ave SE	Naples Sanibel Ft. Myers Ft. Myers Ft. Myers Ft. Myers	FL FL FL FL FL FL	34110 33957 55347 55305 55414 55414	Yellow Pages Walk In Referral Mailing Yellow Pages	Repeat Client VIP Repeat Client Chamber Memb	Kathy Wilson Jo Ann Mulnix Roxanne M. Mc Kathy Wilson Kathi Cleath	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc. David Ames & Associates Diebold Co. Diebold Company Ducks Unlimited	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565 13911 Ridgedale Drive Suite 2 1063 10th Ave SE 1063 10th Ave SE 18543 83rd Ave. N.	Naples Sanibel Ft. Myers Ft. Myers Ft. Myers Ft. Myers Ft. Myers	FL FL FL FL FL FL FL FL	34110 33957 55347 55305 55414 55414 55313	Yellow Pages Walk In Referral Mailing Yellow Pages Cold Contact	Repeat Client VIP Repeat Client Chamber Memb Chamber Memb Association Mer	Kathy Wilson Jo Ann Mulnix Roxanne M. Mc Kathy Wilson Kathi Cleath Jo Ann Mulnix	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc. David Ames & Associates Diebold Co. Diebold Company Ducks Unlimited Ducks Unlimited	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565 13911 Ridgedale Drive Suite 2 1063 10th Ave SE 1063 10th Ave SE 13543 8374 Ave. N. 3976 N. Orchid Lane	Naples Sanibel Ft. Myers Ft. Myers Ft. Myers Ft. Myers Ft. Myers Naples	FL FL FL FL FL FL FL FL FL	34110 33957 55347 55305 55414 55414 55313 34109	Yellow Pages Walk In Referral Mailing Yellow Pages Cold Contact Yellow Pages	Repeat Client VIP Repeat Client Chamber Memb Chamber Memb Association Mer Repeat Client	Kathy Wilson Jo Ann Mulnix Roxanne M. Mc Kathy Wilson Kathi Cleath Jo Ann Mulnix Jo Ann Mulnix	
Chamber of Commerce Collier County Bank Crow Wedding Reception Cruises & Vacations, Inc. David Ames & Associates Diebold Co. Diebold Company Ducks Unlimited Dvorak Reception East High School	1151 Rt. 951 6460 Sanibel Captiva Rd 5001 W 80Th St. #565 13911 Ridgedale Drive Suite 2 1063 10th Ave SE 1063 10th Ave SE 18543 83rd Ave. N. 3976 N. Orchid Lane 1 East Drive	Naples Sanibel Ft. Myers Ft. Myers Ft. Myers Ft. Myers Ft. Myers Naples Naples	FL FL FL FL FL FL FL FL FL FL	34110 33957 55347 55305 55414 55414 55313 34109 34102	Yellow Pages Walk In Referral Mailing Yellow Pages Cold Contact Yellow Pages Repeat Client	Repeat Client VIP Repeat Client Chamber Memb Chamber Memb Association Mer Repeat Client VIP	Kathy Wilson Jo Ann Mulnix Roxanne M. Mc Kathy Wilson Kathi Cleath Jo Ann Mulnix Jo Ann Mulnix John Smith	

**Querying Your Prospective Customers** 

1. Click the **Prospect Query** button from the **Queries** sidebar group. *Result: The Prospect Base Query window opens.* 

Prospect Base Query	×
Set Parameters	
Query Options	
Include	
Exclude Active Accounts	
Don't Show Window	<u>C</u> ancel

- 2. Select your base query options:
  - Click into the **Include** checkbox to Include Only Prospects With All Address Fields Filled Out.
  - Click into the **Exclude** checkbox to exclude Active Accounts from your query.

**Tip:** Your Prospect Query helps you separate your prospective customers (leads) from your active ones. Therefore, this query differs from the previous one because it also contains your list of prospective customers, so you can more easily market to them.

#### 3. Click OK.

**Result:** The Prospect Query is generated.

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All Prospects)									SQL		
Results											
Client	Address	City	St/Prov	Postal	Reference	Description	Sales Rep	^	Ð		
Abby Perkins	1910 Gayfer Drive	Naples	FL	38637	Refferal	Association Mer	John Smith	1	•		
Acoustics Associates	1661 Estero Blvd	Ft. Myers	FL	33931	Referral	Association Mer	Jane Becker		Ħ		
Aid Association for Lutheran:	4900 N Hwy 169 #308	Ft. Myers	FL	55428	Yellow Pages	Association Mer	John Smith		-		
Alzheimer's Association	326 Ellsworth St.	Ft. Myers	FL	38111	Refferal	Association Mer	Jo Ann Mulnix		間		
Amateur Athletic Union	4921 Winchester Road	Ft. Myers	FL	38118	Refferal	Association Mer	Jane Becker				
American Family Insurance	6900 Wedgewood Rd.	Ft. Myers	FL	55459	Cold Contact	Association Mer	Roxanne M. Mc		-		
Baptist Women's Hospital	6225 Humphreys Blvd	Naples	FL	38120	Refferal	Association Mer	Raphael Tavarez		щ,		
Bass Inc.	10 Thompson Street	Ft. Myers	FL	55459	Walk In	Repeat Client	Jane Becker				· ·
Behavioral Services Of SW Flc	1155 Cully Road	Bonita Springs	FL	38018	Refferal	Association Mer	Raphael Tavarez		<b>∃</b> 3; +	٤	Find Panel
Bonita Springs Arts Alliance	Po Box 381005	Bonita Springs	FL	38183	Refferal	Association Mer	Jo Ann Mulnix			$\nabla$	Show Filter Row
CAM/USON Company	322 West State Street	Naples	FL	34102	Yellow Pages	VIP	Roxanne M. Mc				
Cca West Collier Detention	6299 Finde Naifeh Drive	Naples	FL	38049	Refferal	Association Mer	Jo Ann Mulnix			_	Show Footer
Chamber of Commerce	10550 Wayzata Blvd.	Ft. Myers	FL	55305	Mailing	Associations	Jane Becker				Show Navigation Bar
Cole Chiropractic	8101 Walnut Run Rd	Naples	FL	38018	Refferal	Association Mer	Kathi Cleath			-1	Incromental Searching
Collier County Bank	1151 Rt. 951	Naples	FL	34110	Yellow Pages	Repeat Client	Kathy Wilson				Incremental Searching
1	142 Timber Creek Drive	Naples	FL	38018	Refferal	Association Mer	Chad Nelson			_	Preview Field
Community Mortgage	CHORE THE REAL PLAN	Sanibel	FL	33957	Walk In	VIP	Jo Ann Mulnix				
Community Mortgage Crow Wedding Reception	0400 Sanibel Captiva Kd										

4. Optionally click the **Grid Tools** button , located on the right-hand side of your screen, to enable additional features.

# Using Relative Date Ranges in an Event Query

Relative date ranges are an excellent way to set common date ranges for your query. These ranges are always relative to the current date (yesterday, this week, next month, etc.). There are two benefits to using a relative date range, as opposed to choosing specific dates for your range. First, it's obviously faster and easier. Secondly, and perhaps most important, you can save queries with relative date ranges and pull them up at any future time. "This month," after all, will mean the current month, no matter what date you run the query.

#### Using Relative Date Ranges in an Event Query

- 1. Generate a query, such as an Event Query.
- 2. Click on the Click here to add a new condition button.
- 3. Click on the words **Event #** in the condition and choose **Event Date** from the drop-down list.
- 4. Click the word **equals** next to your criterion. *Result:* A list of comparison options drops down.

- 5. Select the relative date range you would like to use for this query. *Note: Relative date ranges are date ranges that are relative to the current date. Examples include: yesterday; this week; next month; last year; past; future; etc.*
- 6. Click the final word in the condition ,<**empty**>, and choose a value for the relative date to correspond with.
- 7. Click the **Perform Query** button .
   *Result:* The query returned all results from an event date which occurred within the relative date range you specified.

## Unit 4: Using "Activity" Queries

#### Objectives:

Upon completing this unit, you will be able to:

- Track all menu items ordered for any date range.
- Use Relative Date Ranges in activity queries.
- Print and customize food/service item labels.
- Track all payment activity for any date range.
- Track all staffing for any date range.
- Track all sub-event activity for any date range.

#### Tracking Menu Item Activity

The Food/Service Activity Query is a flexible tool that allows you to track any menu items you have ordered for any day or date range. Using this powerful feature, you can filter, sort, and group your data to find answers to such questions as, "Which venue has sold the most rental equipment?" or "Which sales representative is doing the best with this month's wine contest?" All food, liquor, equipment, and service item revenue can be tracked any way you want.

- 1. Click the Queries sidebar on the left-hand side of the screen.
- 2. Click the Food/Service Items Query button. Result: The Food/Service Items Base Query window opens.

Food/Service Item Base Query	x
Set Parameters	
Date Range	
<ul> <li>Less Than Or Equal To</li> <li>Greater Than Or Equal To</li> <li>Within Date Range</li> <li>Relative Date Range</li> </ul>	8/1/2015 v thru 8/31/2015 v
Query Options	
Exclude	
Items Without Quantities Items Without Totals Modifiers	
Exclude Status	
None selected	×
Don't Show Window	OK <u>C</u> ancel

- 3. Set a date range for your query by choosing the option Less Than or Equal To, Greater Than or Equal To or Within Date Range, or choose a Relative Date Range for the query (see below).
- 4. **[Optional]** Choose to exclude items that have no quantities, no totals, or no modifiers, using the checkboxes at the lower left of the Food/Service Base Query window.
- 5. Click **OK** to generate the query.

#### Using a Relative Date Range

As mentioned in the previous unit, relative date ranges are an excellent way to set common date ranges for your query. Again, these ranges are always relative to the current date, which makes them very flexible for querying information.

- 1. Click the **Queries** sidebar on the left-hand side of the screen.
- 2. Click the Food/Service Items Query button. Result: The Food/Service Items Base Query window opens.

Food/Service Item Base Query	×
Set Parameters	
Date Range Less Than Or Equal To Greater Than Or Equal To Within Date Range	8/1/2015 v thru 8/31/2015 v
Relative Date Range     Query Options	This month
Exclude	
<ul> <li>Items Without Totals</li> <li>Modifiers</li> </ul>	
Exclude Status	
None selected	~
Don't Show Window	<u>OK</u> ancel

3. Click the radio button next to **Relative Date Range**.

4. Click the down arrow to the right of the <u>Relative Date Range</u> field and select an option from the drop-down list.

Food/Service Item Base Query	×
Set Parameters	
Date Range	
Less Than Or Equal To	8/1/2015 v thru 8/31/2015 v
<ul> <li>Greater Than Or Equal To</li> </ul>	
<ul> <li>Within Date Range</li> </ul>	
Relative Date Range	This month 🗸
	Yesterday
Ouery Options	Today
	Tomorrow
Exclude	Last 30 days
Items Without Quantities	Last 7 days
Items Without Totals	Next 7 days
Modifiers	Next 14 days
	Next 30 days
Exclude Status	Last two weeks
None selected	This week
None selected	Next week
	Next two weeks
Don't Show Window	Last month
	Next month
	Last year
	This year
	Next year
	Past
	Future

- 5. **[Optional]** Choose to exclude items that have no quantities, no totals, or no modifiers, using the checkboxes at the lower left of the Food/Service Base Query window.
- 6. Click **OK** to generate the query.

# **Printing Menu Item Labels**

Sometimes it's handy to have labels for your food/service menu items. Whether you are packing them for an off-premise event, or whether you just need a quick reference for chafing dishes or trays, labels can be quickly generated from your Food/Service Items Query. (This feature is available in the Professional version.)

#### **Printing Menu Item Labels**

1. Generate a Food/Service Items Query.

- Click on a menu item in your query results grid to select it, or hold your [Ctrl] key or [Shift] key down to select multiple items. Note: The [Ctrl] key lets you select multiple records; the [Shift] key selects two records and all others in between them. You can also click your right mouse button over the grid and choose Select All Records.
- 3. Click the bottom half of the **Prints** button, located in the **Home** ribbon tab at the top of your screen.
- Click Food/Service Query > Food/Service Labels.
   Result: The Food/Service Item Packing Labels window opens.

Food/Service Ite	m Packing Labels		×
Set Parameter	rs		Modify
Avery Label			
-			
Label Type:	Address 5160		~
Options			
Center Text			
Visible Fields		F	S-Time 🗸
Name w/Qt	у		
Category			
Type			
Prep Area			
Unit			
Acct Code			
✓ Event #			
Event Date			
Client			
Address	Destal		
Telephone	v, POstal		
Room			
Site Name			
Party Name			
Close After Pri	nting	<u>O</u> K	Cancel

- 5. Click on an Avery Label format from the Label Type drop-down list.
- 6. Click into any checkbox or checkboxes under **Visible Fields** to choose which information you want to appear on the labels.
- 7. **[Optional]** Click into the checkbox next to **Center Text**, under **Options**, if you want the text you chose in Step 6, above, to be centered on the label.
- 8. Click **OK** when finished. *Result:* A Print Preview of the labels appears.
- 9. Click the **Print** button to print the labels.

#### Modifying Menu Item Labels

At times, you may want to make a one-time-only modification to one or several of

your menu item labels before you send them to the printer. Perhaps you need to include a note on the label, or perhaps you need more than one label for a particularly large item. Making modifications to your labels can be done easily from the Food/Service Query.

- 1. Follow Steps 1-7, above, to select your Avery Label style and designate the optional information to appear on each label.
- Click the Modify button at the top right of the Food/Service Item Packing Labels window.
   Result: The Modify Packing Labels window opens.
- Click into any column on the Modify Packing Labels window and edit the information as desired. *Note: These are one-time-only changes.*
- 4. Click **Close** when finished.
- 5. Click **OK** on the Food/Service Item Packing Labels window to generate your Print Preview.

* Name	*	Qty	Cnt
Sweet and Sour Meatballs		2	1
Deviled Eggs		1	1
Chiled Jumbo Shrimp with Cocktail		2	1
Chardonnay		5	1
Breaded Mushrooms		1	1
Assorted Cheese and Salami with Crackers		1	1
Imported Champagne (Keep Chilled_		5	1

Available fields are listed below:

Option	Description
Event #	This reflects the Event #, and cannot be edited.
Event Date	This reflects the Event Date, and cannot be edited.
Item Name	Type here to edit the name of a menu item as it appears on your label. For example, if a particular menu item cannot be packed into one box, you might add the words "2 Boxes" to the end of its name on the label (then see <b>Cnt</b> , below). Note that this number only appears on the label if "Name w/Qty" has been selected as an option.
Qty	This is the quantity of menu items included, and can be edited as desired. Note that this number only appears on the label if "Name

Option	Description
	$w/\mbox{Qty}''$ has been selected as an option. (See Step 6, "Printing Menu Item Labels.").
Cnt	If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary count here. Simply type as desired, and whatever number you type will be the number of labels generated for that item.
Client	Type here to edit the Client/Organization.
Address	Type here to edit the mailing address.
City	Type here to edit the city where the customer resides.
St/Prov	Type here to edit the state or province where the customer resides.
Postal	Type here to edit the ZIP code where the customer resides.
Telephone	Type here to edit the recipient's telephone number.
Room	Merges in the name of the room 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.
Party Name	Merges in the party name of the event. e.g., "Smith Wedding Reception," "Jones Birthday Party," etc.
Prep Area	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field.)
Category	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field.)
Acct Code	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field.)
Unit	If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary unit here. Simply type as desired, and whatever number you type will be the number of labels generated for that item.

# **Printing Bar Codes**

For Professional version users, you can enter bar codes for each of your various menu items, and have those bar codes optionally appear on any of your custom event prints or even on their own Bar Code Labels. This section discusses the latter topic, and assumes you have already entered your bar codes into Menu Manager or Event Manager.

#### **Printing Bar Codes**

Note: To enter bar codes into Event Manager, click the Quick Column Customizing button on the Sub-Event display, Food/Service tab, and select Bar Code. Type the bar code into the <u>Bar Code</u> field and save your changes.

- 1. Generate a Food/Service Items Query.
- Click on a menu item in your query results grid to select it, or hold your [Ctrl] key or [Shift] key down to select multiple items. Note: The [Ctrl] key lets you select multiple records; the [Shift] key selects two records and all others in between them. You can also click your right mouse button over the grid and choose Select All Records.
- Click the bottom half of the Prints button, located in the Home ribbon tab at the top of your screen, and choose Food/Service Query > Food/Service Bar Codes.

Result: The Food/Service Item Bar Code Labels window opens.

Food/Service Item Bar Code Labels
Set Parameters Avery Label Label Type: Address 5160
Options       Options       Right Align Bar Codes       Close After Printing       OK

- 4. Select an Avery Label type by clicking the down arrow to the right of the Label Type field.
- 5. **[Optional]** Click into the checkbox next to **Right Align Bar Codes** if you would like the bar codes to be right-aligned.
- 6. Click **OK** when finished. *Result: A Print Preview of the bar codes appears.*
- 7. Click the **Print** button, located on the upper left-hand side of your screen, to print the bar codes.

# **Tracking Payments Activity**

The Payments Made Query tracks all payments made to your company during any day or date range. Again, the same powerful grid tools are available, such as sorting, filtering, or grouping your data. Thus, you can use this tool to answer such questions as "Which sales representative has received the most credit card payments this month?" or "What has been my most common method of payment this year?"

#### **Tracking Payments Activity**

- 1. Click the Queries sidebar on the left-hand side of the screen.
- Click the Payments Query button. Result: The Payments Made Base Query window opens.

Payments Made Base Query	×
Set Parameters	
Date Range	
<ul> <li>Less Than Or Equal To</li> <li>Greater Than Or Equal To</li> <li>Within Date Range</li> </ul>	5/1/2016 v thru 5/31/2016 v
Relative Date Range	This month 🗸
Query Options	
Include	
ONLY Closed Events	
Group Booking Payments	
Exclude Status	
None selected	~
Don't Show Window	OK Cancel

- 3. Set a **Date Range** for your query by choosing the option **Less Than or Equal To, Greater Than or Equal To, or Within Date Range**, or choose a **Relative Date Range** for the query.
- 4. **[Optional]** Use the checkboxes at the lower left of the Payments Made Base Query window to choose to include only events that have been closed, or to include payments made on group bookings (for hotels, inns, etc.).
- 5. Click the down arrow to the right of the <u>Exclude Status</u> field to exclude any statuses (Closed, Cancelled, etc.).
- 6. Click **OK**. *Result:* The Payments Made Query is generated.

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ilter									
filter AND	applies to the	: main query idition							
ayment Da	te Range: 5/1/20	)16 - 5/31/2016)							5
Event #	Status	Client	Sales Rep	Pay Date	Amount	Pay Method	Category	^	1
E00329	Definite	Aid Association for Lutherans	Roxanne M. Mc Na	5/3/2016	\$500.00	Credit Card			
E00329	Definite	Aid Association for Lutherans	Roxanne M. Mc Na	5/3/2016	\$500.00	Credit Card			
E00286	Definite	American Family Insurance	Jo Ann Mulnix	5/3/2016	\$350.00	Credit Card			
E00111	Definite	Crow Wedding Reception	Jo Ann Mulnix	5/3/2016	\$500.00	Credit Card			
E00111	Definite	Crow Wedding Reception	Jo Ann Mulnix	5/3/2016	\$500.00	Credit Card			
E00111	Definite	Crow Wedding Reception	Jo Ann Mulnix	5/3/2016	\$1,000.00	Credit Card			1
E00111	Definite	Crow Wedding Reception	Jo Ann Mulnix	5/3/2016	\$1,000.00	Credit Card			
COULLI	Definite	Cruises & Vacations, Inc.	John Smith	5/3/2016	\$270.75	Check			Ľ
E00111 E00325	Definite	David Ames & Associates	Roxanne M. Mc Na	5/3/2016	\$262.33	Direct Bill			1
E00325 E00369				E (2) (201 C	\$500.00	Direct Bill			
E00325 E00369 E00344	Definite	Diebold Company	Jo Ann Mulnix	5/3/2010	3500.00	oneer on			
E00325 E00369 E00344 E00344	Definite Definite	Diebold Company Diebold Company	Jo Ann Mulnix Jo Ann Mulnix	5/3/2016 5/3/2016	\$500.00	Direct Bill			
E00325 E00369 E00344 E00344 E00344	Definite Definite Definite	Diebold Company Diebold Company Diebold Company	Jo Ann Mulnix Jo Ann Mulnix Jo Ann Mulnix	5/3/2016 5/3/2016 5/3/2016	\$500.00	Direct Bill Direct Bill			
E00325 E00369 E00344 E00344 E00344 E00344	Definite Definite Definite Definite	Diebold Company Diebold Company Diebold Company Ducks Unlimited	Jo Ann Mulnix Jo Ann Mulnix Jo Ann Mulnix Roxanne M. Mc Na	5/3/2016 5/3/2016 5/3/2016 5/3/2016	\$500.00 \$500.00 \$972.65 \$1,000.00	Direct Bill Direct Bill Direct Bill			
E00325 E00369 E00344 E00344 E00344 E00356 E00356	Definite Definite Definite Definite Definite	Diebold Company Diebold Company Diebold Company Ducks Unlimited Ducks Unlimited	Jo Ann Mulnix Jo Ann Mulnix Jo Ann Mulnix Roxanne M. Mc Na Roxanne M. Mc Na	5/3/2016 5/3/2016 5/3/2016 5/3/2016 5/3/2016	\$500.00 \$500.00 \$972.65 \$1,000.00 \$1,000.00	Direct Bill Direct Bill Direct Bill Direct Bill			
E00311 E00325 E00369 E00344 E00344 E00356 E00356 E00356	Definite Definite Definite Definite Definite Definite	Diebold Company Diebold Company Diebold Company Ducks Unlimited Ducks Unlimited	Jo Ann Mulnix Jo Ann Mulnix Jo Ann Mulnix Roxanne M. Mc Na Roxanne M. Mc Na Roxanne M. Mc Na	5/3/2016 5/3/2016 5/3/2016 5/3/2016 5/3/2016 5/3/2016	\$500.00 \$500.00 \$972.65 \$1,000.00 \$1,000.00 \$1,000.00	Direct Bill Direct Bill Direct Bill Direct Bill Direct Bill			
E00111 E00325 E00369 E00344 E00344 E00344 E00356 E00356 E00356 E00356 E00356	Definite Definite Definite Definite Definite Definite Definite	Diebold Company Diebold Company Diebold Company Ducks Unlimited Ducks Unlimited Ducks Unlimited Dvorak Reception	Jo Ann Mulnix Jo Ann Mulnix Jo Ann Mulnix Roxanne M. Mc Na Roxanne M. Mc Na Roxanne M. Mc Na Roxanne M. Mc Na	5/3/2016 5/3/2016 5/3/2016 5/3/2016 5/3/2016 5/3/2016 5/3/2016	\$500.00 \$500.00 \$972.65 \$1,000.00 \$1,000.00 \$1,000.00	Direct Bill Direct Bill Direct Bill Direct Bill Direct Bill Credit Card			

# **Tracking Sub-Event Activity**

This activity query is focused on your sub-events, in other words, the individual meals you have served. For example, you can use this to track how many "Dinner Buffets" you've had during a particular date range or which type of sub-event has generated the most revenue, etc.

#### **Tracking Sub-Event Activity**

- 1. Click the Queries sidebar on the left-hand side of your screen.
- Click the Sub-Event Query button. Result: The Sub-Event Base Query window opens.

Sub-Event Base Query ×
Set Parameters
Date Range
<ul> <li>Less Than Or Equal To</li> <li>Greater Than Or Equal To</li> <li>Within Date Range</li> </ul>
Relative Date Range     This month     Y
Query Options
Exclude Sub-Events Without Rooms
Sub-Events Without Site Locations
Exclude Status
None selected
Don't Show Window

- 3. Set a date range for your query by choosing the option Less Than or Equal To, Greater Than or Equal To, or Within Date Range, or choose a Relative Date Range for the query.
- 4. **[Optional]** Use the checkboxes at the lower left of the Sub-Event Activity Query window to choose to exclude sub-events that have no banquet room or off-premise site location information.
- 5. Click the down arrow to the right of the <u>Exclude Status</u> field to exclude any statuses (Closed, Cancelled, etc.).
- 6. Click OK.

**Result:** The Sub-Event Query is generated. The tools in this grid allow you to show or hide details, sort data, group data, export information, or even print custom grids.

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Clinik have to											
JICK here to	o add a new condition										-
											1
ate Range:	5/1/2016 - 5/31/2016)										5
esults											
Event #	Client	Status	Date	Sales Rep	Room	Start	End	Planned	Actual	^	1
E00329	Aid Association for Lutheran	Definite	5/13/2016	Roxanne M. Mc N	Ocean	09:30 AM	03:30 PM	120	120		
E00286	American Family Insurance	Definite	5/13/2016	Jo Ann Mulnix	Terrace	09:00 AM	01:30 PM	50	50		i
E00342	CAM/USON Company	Prospective	5/13/2016	Jo Ann Mulnix	Royal Palm	11:00 AM	02:30 PM	30	30		P
E00111	Crow Wedding Reception	Definite	5/4/2016	Jo Ann Mulnix	Sand-Sun	05:00 PM	09:00 PM	200	200		
E00356	Ducks Unlimited	Definite	5/24/2016	Roxanne M. Mc N	Sand-Sun	11:00 AM	02:00 PM	150	150		-
E00371	Dvorak Reception	Definite	5/12/2016	Roxanne M. Mc N	Royal Palm	05:00 PM	11:30 PM	90	90		
E00378	Gustave A. Larson Company	Definite	5/2/2016	Roxanne M. Mc N	Royal Palm	12:15 PM	02:15 PM	80	80		E
E00379	Gustave A. Larson Company	Closed	5/3/2016	Roxanne M. Mc N	Sun-Sea	02:30 PM	05:00 PM	85	85		-
E00226	Lenox/Uchtman Wedding	Definite	5/25/2016	Roxanne M. Mc N	Ocean	05:00 PM	12:00 AM	210	200		
E00323	PSS	Definite	5/3/2016	Kathy Wilson	Meeting	01:00 PM	05:00 PM	5	5		
E00184	Salassa/Lau Wedding Recept	Definite	5/11/2016	Roxanne M. Mc N	Royal Palm	12:00 PM	10:00 PM	110	110		
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sun	11:30 PM	02:00 PM	20	20		
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sea	09:00 AM	10:00 AM	20	20		
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sun	06:00 PM	09:00 PM	20	20		
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sea	09:00 PM	10:30 PM	20	20		
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sand	03:00 PM	04:00 PM	20	20		
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