Caterease Software
Version 12.5
User's Guide

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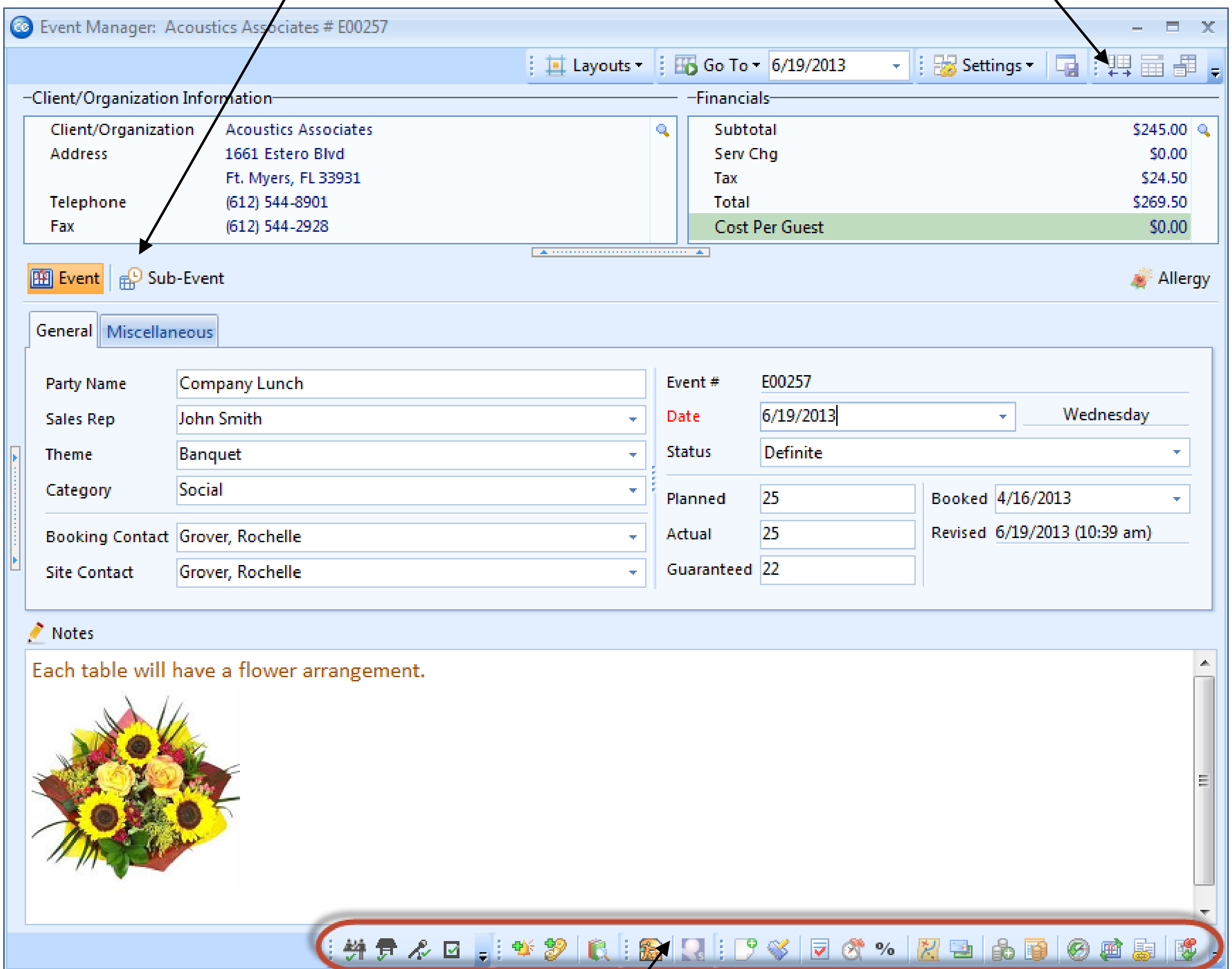
SECTION 1: Events

Unit 1: Event Manager

Topics covered in this unit include:

Introducing the Event Manager
Exploring the Event Display
Exploring the Sub-Event Display

Event and Sub-Event Displays *Detail Grid Tools*



Event Manager Toolbar

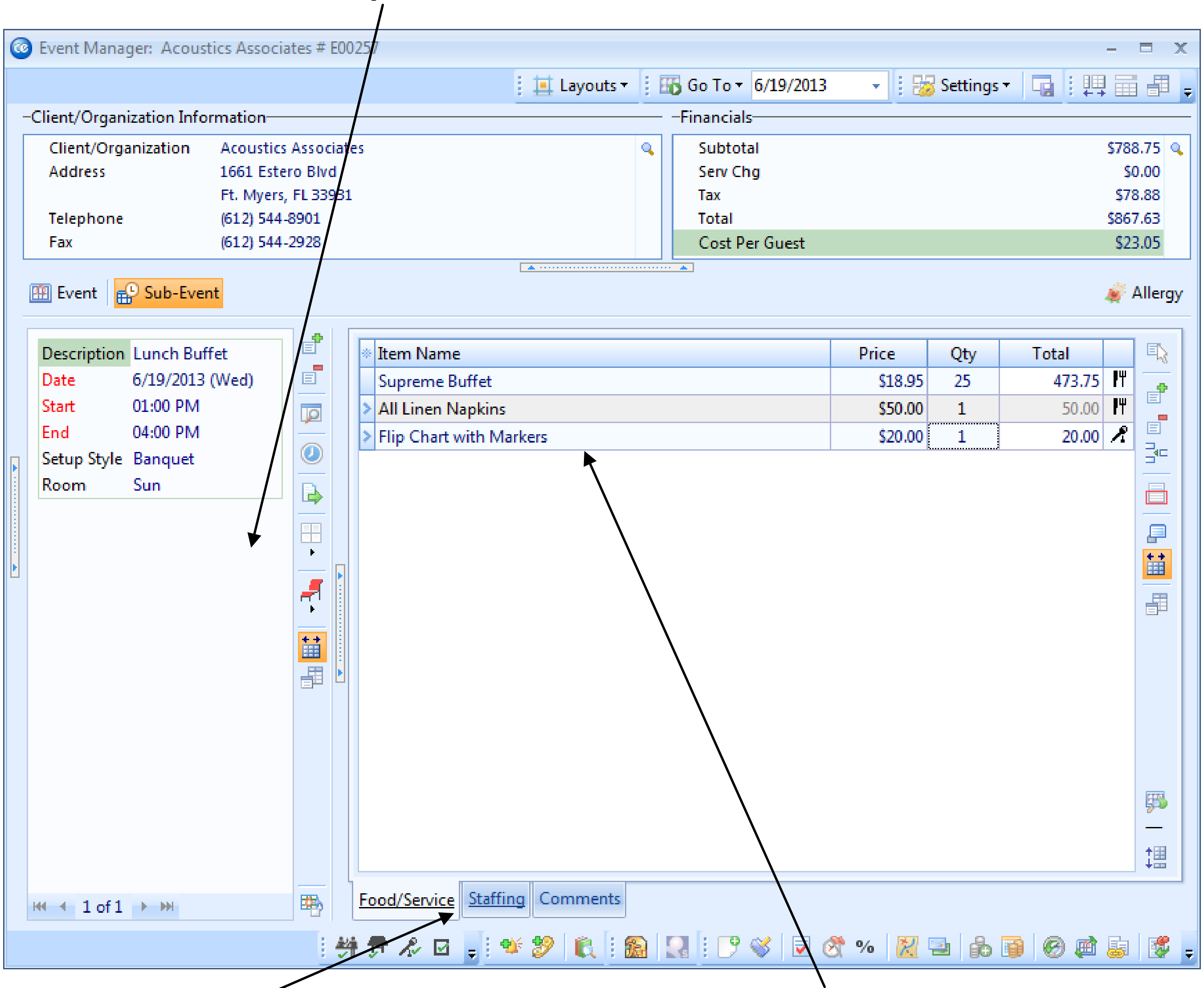
Event Manager Introduction

The Event Manager is the heart of the Caterease program. This is the place to go when you want to review an existing event in detail, modify an existing event, or add a new event. You can also generate numerous prints from Event Manager, including the Contract, Invoice, or Banquet Event Order (BEO) for a particular event. Even if you choose to add a new event using the Event Wizard (discussed later in this guide), the process will ultimately lead you to the Event Manager screen.

The Event Manager has two main displays: Event and Sub-Event. The Event display allows you to view or edit any general event information, such as party name, theme, guest count, event date, etc. The Sub-Event display allows you to enter more specific event details, such as event times, event venue, food and service items, staffing, etc.

As with the other “Managers” in the program, the Event Manager makes use of the main Caterease toolbars at the top of the screen. Buttons on these toolbars allow you to add or delete events, search for a particular event, navigate quickly from one event to another, and perform a host of other powerful tasks. You can even generate a print of the Manager screen you are viewing or access the program’s on-board Help menu for assistance.

Sub-events are listed in this panel



Sub-Event Tabs *Sub-Event Food/Service Items*

Event Manager Sub-Event Display

Every event has at least one sub-event, which contains the specifics (times, menu, function, space) of that event. In other cases, a sub-event is just what it sounds like: a small part of a larger event. For example, you might have an all-day function that is made up of, say, three sub-events: a “breakfast,” a “lunch,” and a “dinner.” Or, you may have a single function that takes place over multiple days, and each day could be an individual sub-event. Since you can rename the term “Sub-Event,” as it appears in Caterease, as anything you want, you might also use this feature to create multiple proposals for an event.

Unit 2: Navigation Tools

Topics covered in this unit include:

Introducing the Navigation Bar
Using the Event Finder Tool
Using the Go-To Tool

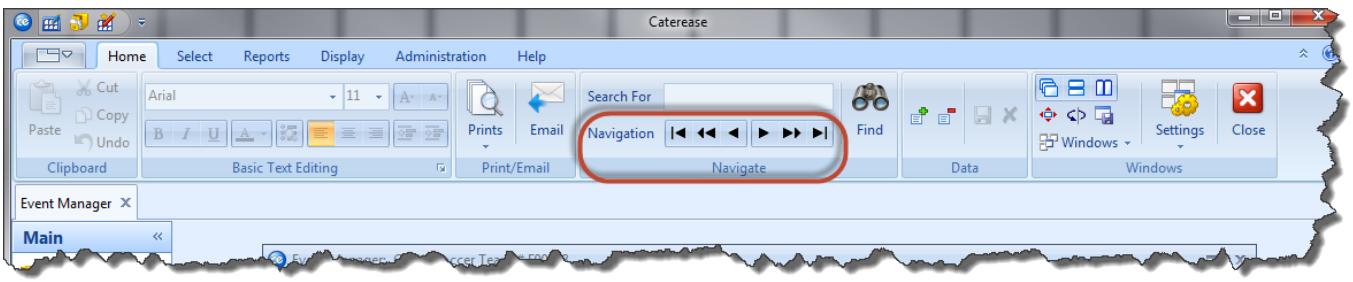
Navigation Bar

What is the purpose of the Navigation bar?

The navigation buttons help you move through the Event Manager database.
By default, your Event Manager screen displays the current event or, if no event is scheduled for "today," the closest event to today.

From Event Manager, follow the guidelines below to locate an event:

1. Click the **Next** arrow to move forward to the next event.
2. Click the **Prior** arrow to move to the previous event.
3. Click the **Next Page** arrow to move forward to the bottom of the Detail Grid view.
   Note: *The records in Event Manager are based on a table of records which display chronologically in a grid. "Next Page" refers to the last record on that page. See Unit 14 for additional information about Grid Views.*
4. Click the **Prior Page** arrow to move back to the previous page of the Detail Grid view.
5. Click the **Last** arrow to move to the last customer located in the Detail Grid view.
6. Click the **First** arrow to move to the first customer in the Detail Grid view.



Event Finder

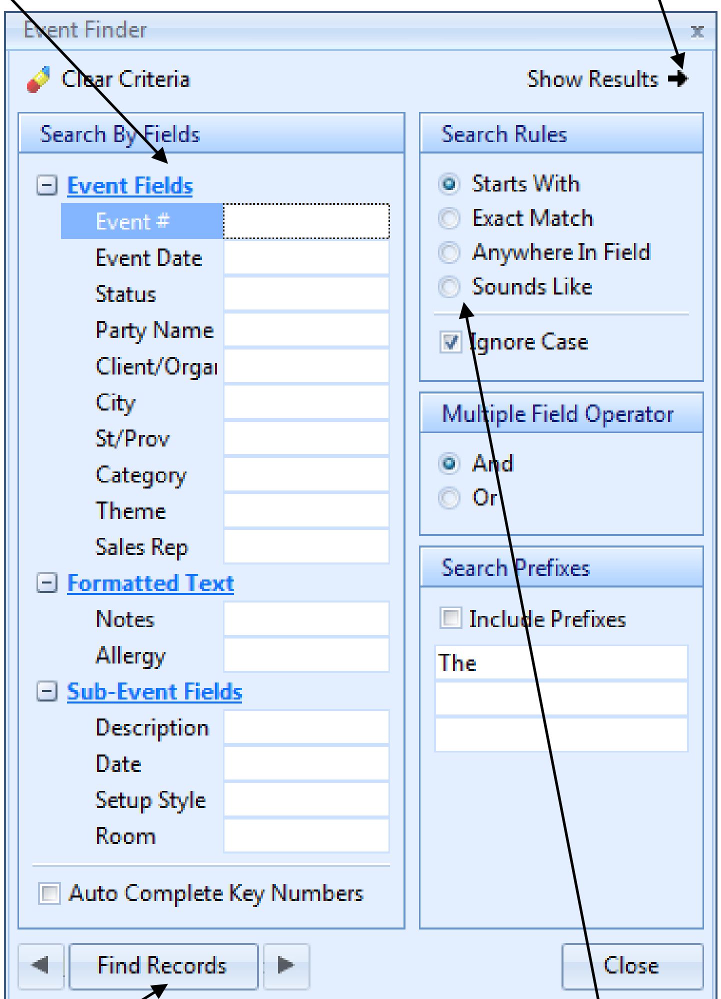
What is the Event Finder?
The Event Finder is a powerful tool to locate existing events in your program. You can search by various criteria, search in a backward or forward direction from your current position, and even display a list of all records that matched your search.

Finding an Event

1. Click the **Find** button , located on the **Home** ribbon tab at the top of your Caterease screen.
2. In the Search By Fields area, type the text you would like to search for.
   Note: *You may search by more than one field.*
3. In the Search Rules field, select the appropriate rule.
4. **[Optional]** Click the radio button next to And or Or, within the Multiple Field Operator section, if you are searching by multiple search criteria.
5. **[Optional]** Click the Include Prefixes checkbox and then type the prefix (a, an, the) into the Search Prefixes section to include prefixes in your search.
6. Click the **Find Records** button.
   Note: *If the first match is not the record you are seeking, you can click* ***Find Records*** *again.*
7. Once your record is located, click **Close**.

Type what you want to search for

Displays all matches for your search



Click here to find your records

Establish your search criteria

Using the “Go To” Tool

Can I search for an event by its event date?

Caterease has a special tool for searching for records based on date. It’s called the “Go To” tool, and you will find it in the toolbar at top right-hand side of your Event Manager screen.

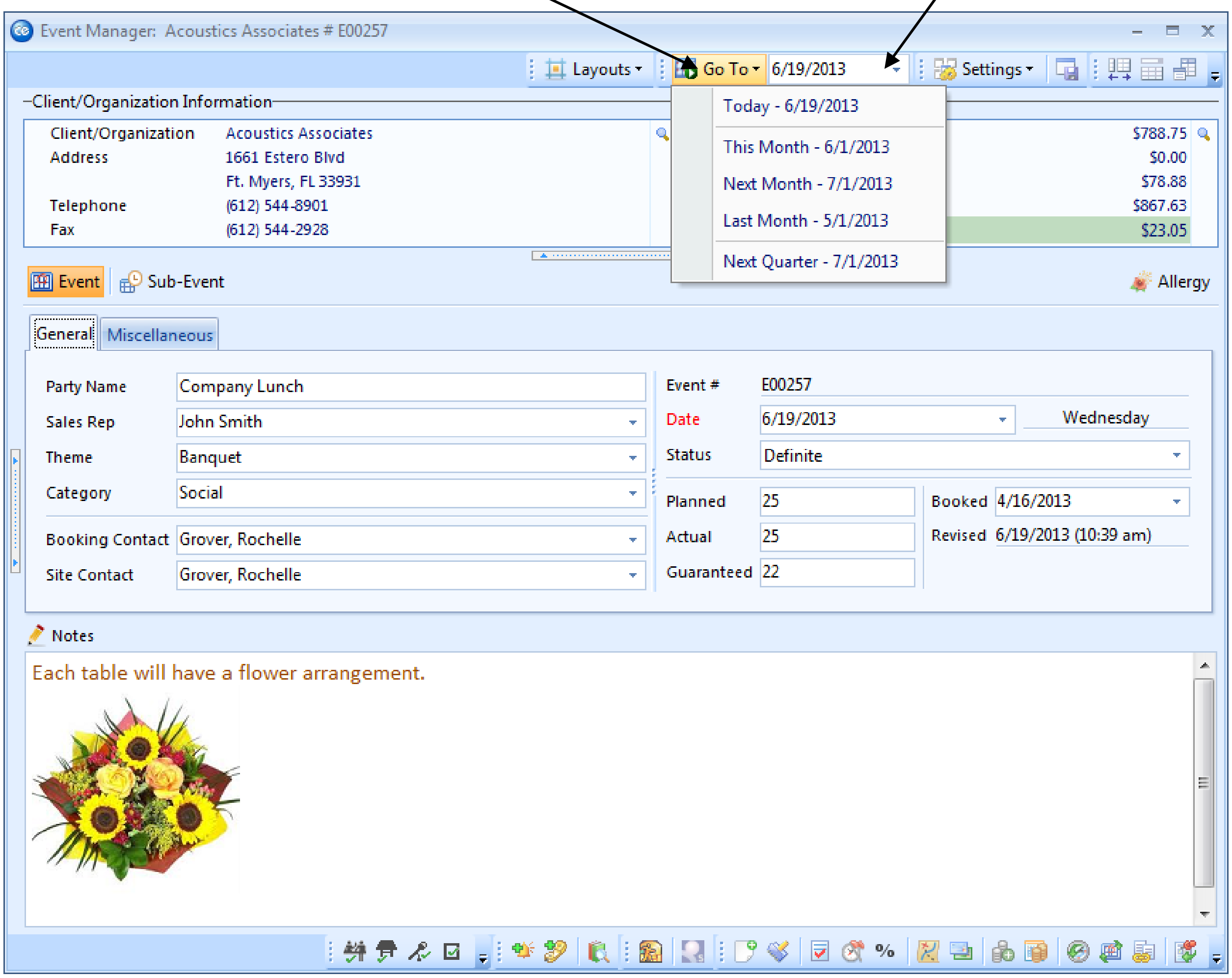
Finding an Event by Date

1. Open Event Manager.
2. Click the **Go To** button at the top right-hand side of your screen.
3. Choose to go to the first event taking place today, this month, next month, last month, or next fiscal quarter, or use the special calendar tool to the right of the **Go To** button to go to the first event on any date.

Tip: When you use the **Go To** tool, Caterease automatically re-sorts your events by Event Date. Thus, if the first record on a given day is not the one you want, simply use the navigation buttons at the top of your Caterease screen to scroll to the desired record.

Click “Go To” at top of the screen

or *pick a date and go to first event on that day*



Unit 3: Booking a New Event in Event Manager

Topics covered in this unit include:

Selecting a Customer
Entering General Event Information
Adding Contact People
Creating a Sub-Event
Entering Off-Premise Site Location Details
Adding Menu Items
Generating a Print
E-mailing a Print

Booking a New Event for an Existing Customer from Event Manager

How does an existing customer differ from a new one?

If you wish to add a new event for a new customer, that means you have never done any business with that customer before; that company's information has not yet been entered into Caterease. If, however, your new event is for an existing customer, that company's information is already in the program; you need only retrieve it. Once the details of a particular client have been entered into Caterease, you never have to type them a second time.

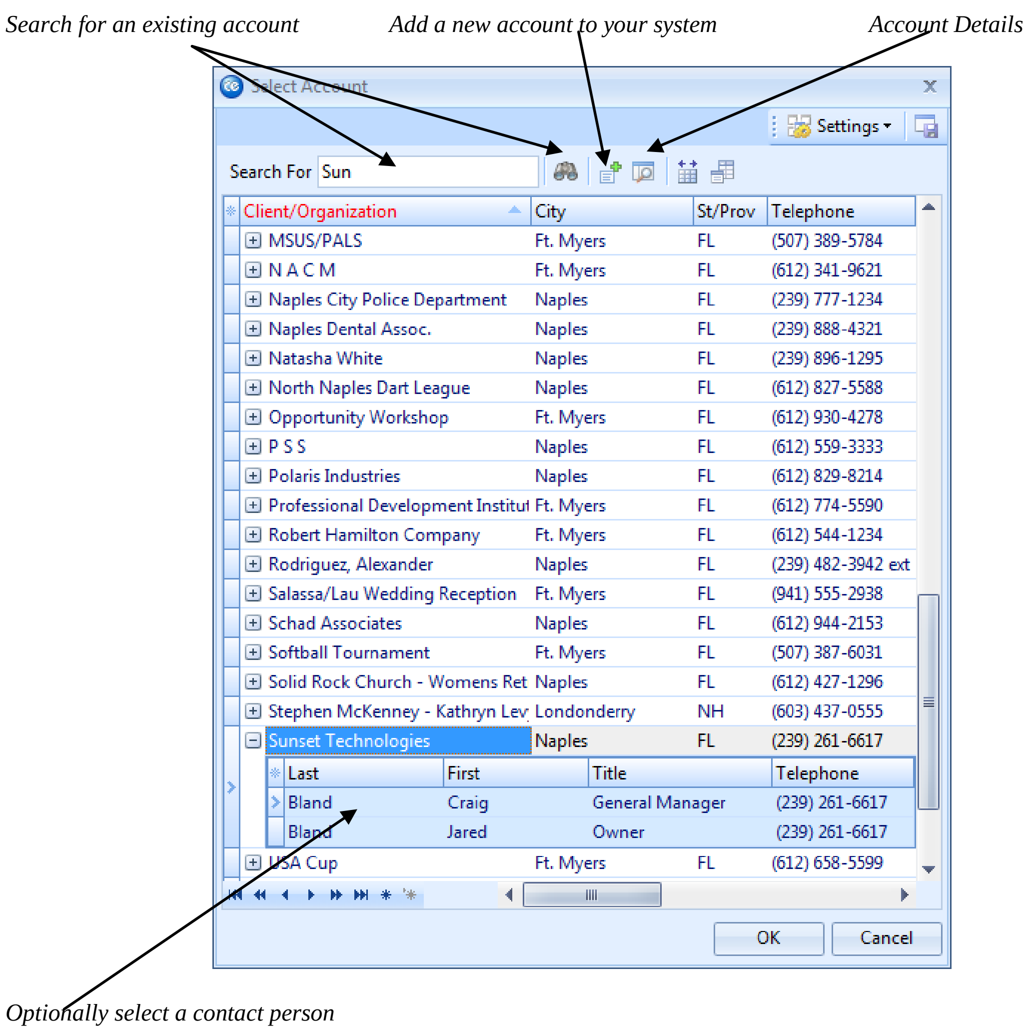
Note: *This topic discusses adding a new event manually from within Event Manager. As an option, see the chapter on using the Event Wizard.*

Adding a New Event

1. Access the Event Manager by clicking **Event Manager** from the **Main** Caterease sidebar.
2. Click the **Add Record** button , located at the top of your Caterease screen.
   Result: *A confirmation prompt appears.*
3. Click **Yes** to confirm your choice.

Selecting an Existing Account

1. Scroll to find the existing client you wish to work with or begin typing the Client/Organization name into the Search For field.
2. Optionally select a contact person.
3. Click **OK**.



Searching For Accounts

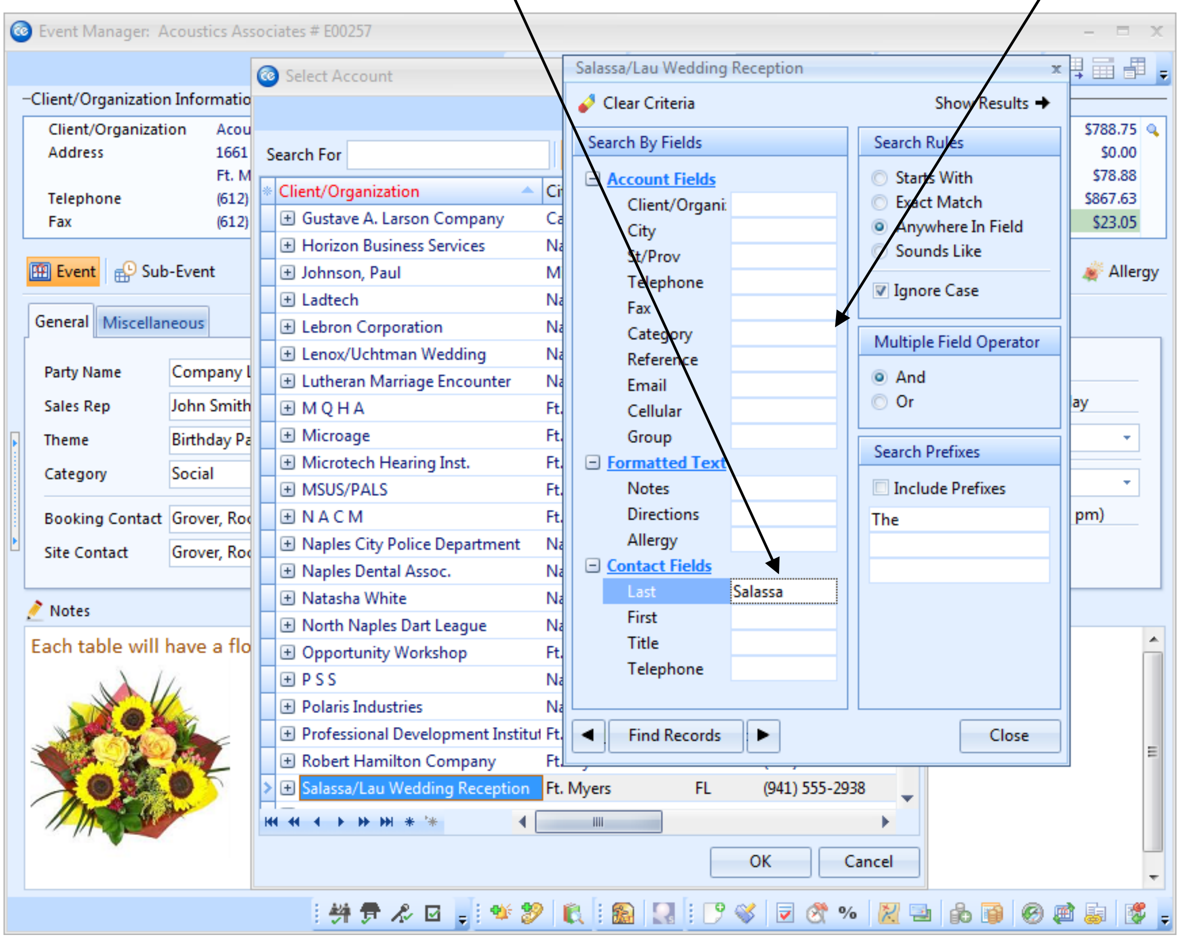
What is the Account Finder?

The Account Finder is a powerful Caterease search tool. You can search for accounts by various criteria, search in a backward or forward direction from your current position, and even display a list of all records that matched your search.

Finding an Event

1. To use the Search Tool, click the **Search Records** button , located at the top of the Select Account window.
2. In the Search By Fields area, type the text you would like to search for.
   Note*: You may search by more than one field.*
3. In the Search Rules field, select the appropriate rule.
4. **[Optional]** Click the radio button next to And or Or, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.
5. **[Optional]** Click the Include Prefixes checkbox and then type the prefix (a, an, the) into the **Search Prefixes** section to include prefixes in your search.
6. Click the **Find Records** button.
   Note: *If the first match is not the record you are seeking, you can click* ***Find Records*** *again.*
7. Once your record is located, click **Close**.

Don't forget to choose the correct field or fields to search by *Very flexible search rules options*



Entering Event Information

What is meant by "event information"?

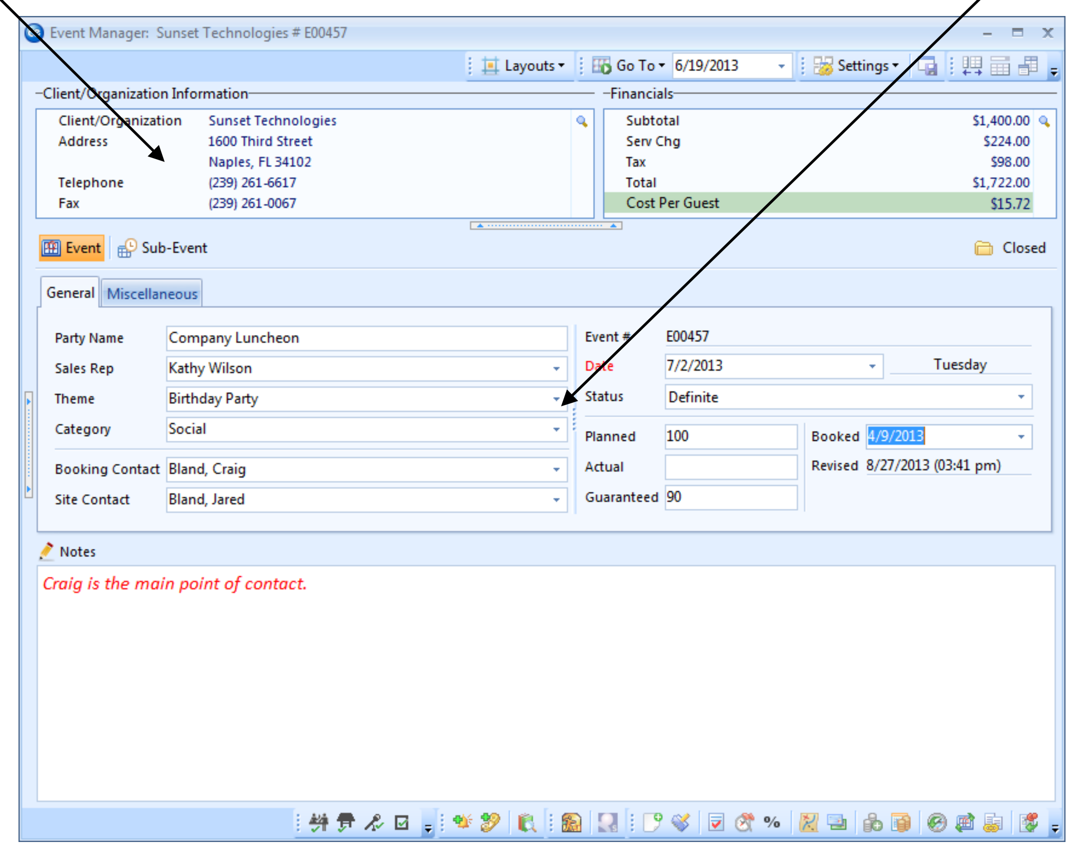
In the middle of your Event Manager form, you will notice two tabs: **General** and **Miscellaneous**. Each of these tabs has various fields, and that is the information discussed here. You can rearrange the fields on either of these tabs, and you can also determine which fields appear or do not appear on those tabs.

Note: *This topic discusses adding a new event manually from within Event Manager. As an option, see the chapter on using the Event Wizard.*

Entering Information

1. Click into the first field on the **General** tab.
2. Edit each field using the following guidelines, pressing the **[Enter]** or [**Tab**] key to move from one field to the next:
   - For fields such as Party Name or guest number fields, simply click in the field and type.
   - For fields with associated drop-down lists (Sales Rep, Theme, Category, etc.), click the down arrow at the right of each field to view the list, then just click a selection from the list.
   - For date fields, type a date into the field or click the down arrow at the right of the field to access the drop-down calendar.
   - For financial fields (such as Cancellation Charge), simply type a dollar amount into the field or click the down arrow at the right of the field to access the calculator tool. ***Note:*** *Cancellation Charge is not displayed by default, but may be added via the Customization tools, explained later in this guide.*
   - To retrieve a contact person *you have already entered into Caterease*, click the down arrow at the right of Booking or Site Contact, then click the **Select Contact From File** button , located at the upper right-hand corner of that screen. If you are adding a new contact, press the **Add Contact to File** button  after you have entered the new contact information.

Client Information defaults from Account Manager *Use drop-downs (quick-pick lists) for General Information*



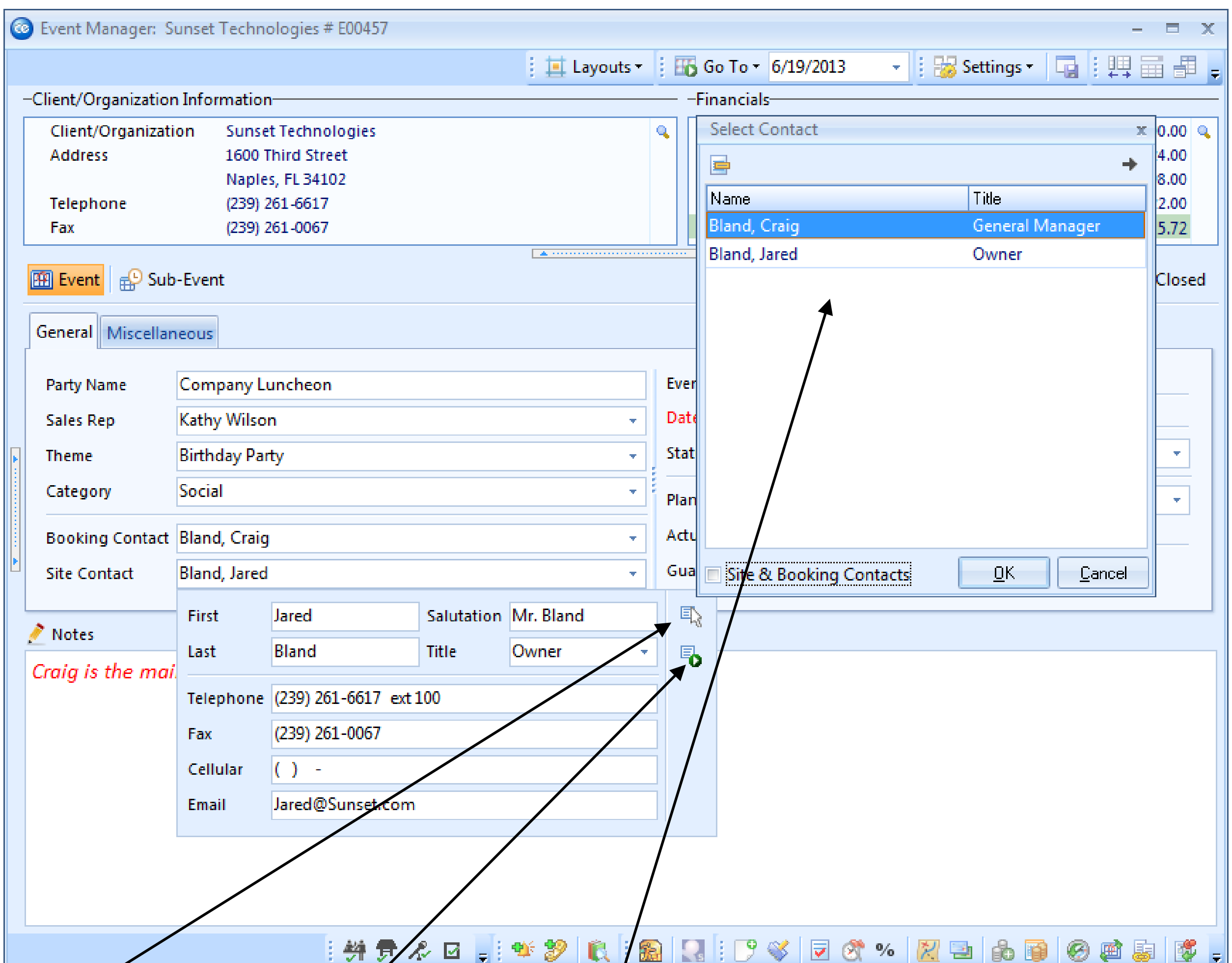
Filling in Event Information: Adding Contacts

I thought I already chose the contact person?

It's very important to remember one thing as you use Caterease: You should never have to type the same thing more than once. You have already learned how to choose a contact person for an account. So, in this case, as you book an event for this account, you can simply retrieve that contact information rather than type it all again. ***Note:*** *This topic discusses adding a new event manually from within Event Manager. As an option, see the chapter on using the Event Wizard.*

Adding a Contact to an Event

1. Click the down arrow next to the Booking Contact or Site Contact field to open that screen for editing.
2. If you have already entered a contact person for this account, you don't have to re-type that information. (Click the **Select Contact From File** button to retrieve the contact person you already entered.)
3. Select the Booking contact person you want for the event.
4. If you want this person to also be the site contact for the event, click the checkbox next to **Site & Booking Contacts**.
5. Click **OK** to insert the contact person.
6. Repeat the process for the Site Contact.
7. If the contact person does not appear for this account, fill in Booking Contact information (Name, Salutation, etc.), and click the **Add Contact to File** button to add to your default contacts.



Select Contact *button* ***Add Contact to File*** *button* *Select Contact from List*

Event Date

What's so special about entering a date?
Caterease gives you many useful tools to assist you with data entry. In date fields such as Date, you can take advantage of the program's drop-down calendar to pick the exact date for your event. You can also use the advanced "Smart Date Editing" feature to have Caterease interpret dates for you.
Note: *This topic discusses adding a new event manually from within Event Manager. As an option, see the chapter on using the Event Wizard.*

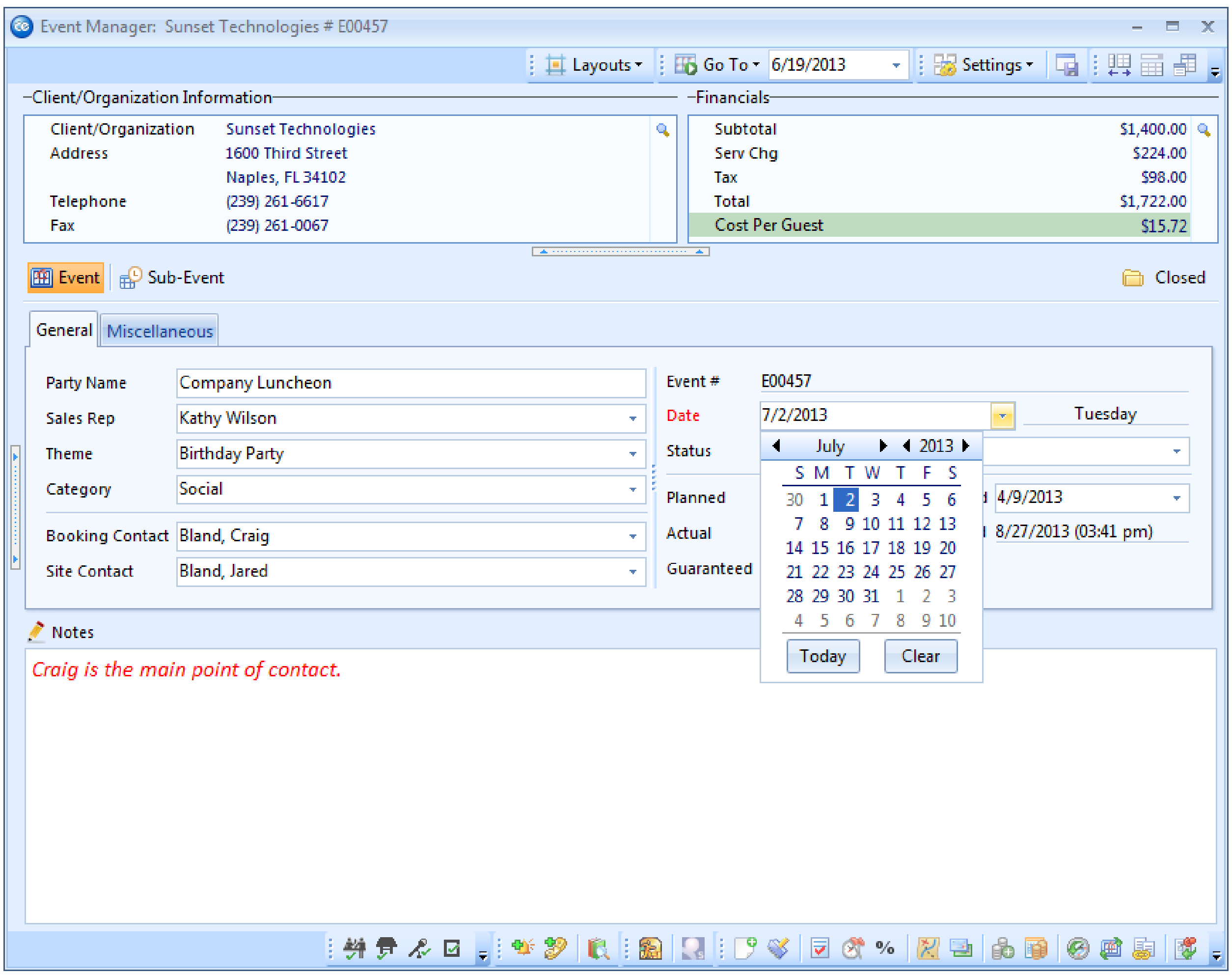
Entering a Date

1. Click the down arrow to the right of the Date field.
2. Select a month by using the navigation arrows or holding your left mouse button down on the name of the calendar month and dragging either down or up.
3. Click a date to select it.

Using Smart Date Editing (*available in the Professional version only*)

With Smart Date Editing, you can enter such things as the following into any date field:

- "today" – returns the current date
- "Wednesday" – returns the date of the next coming Wednesday (or any other weekday)
- "eom" – returns the date at the end of the current month
- "eom+1" returns the first date of the next month



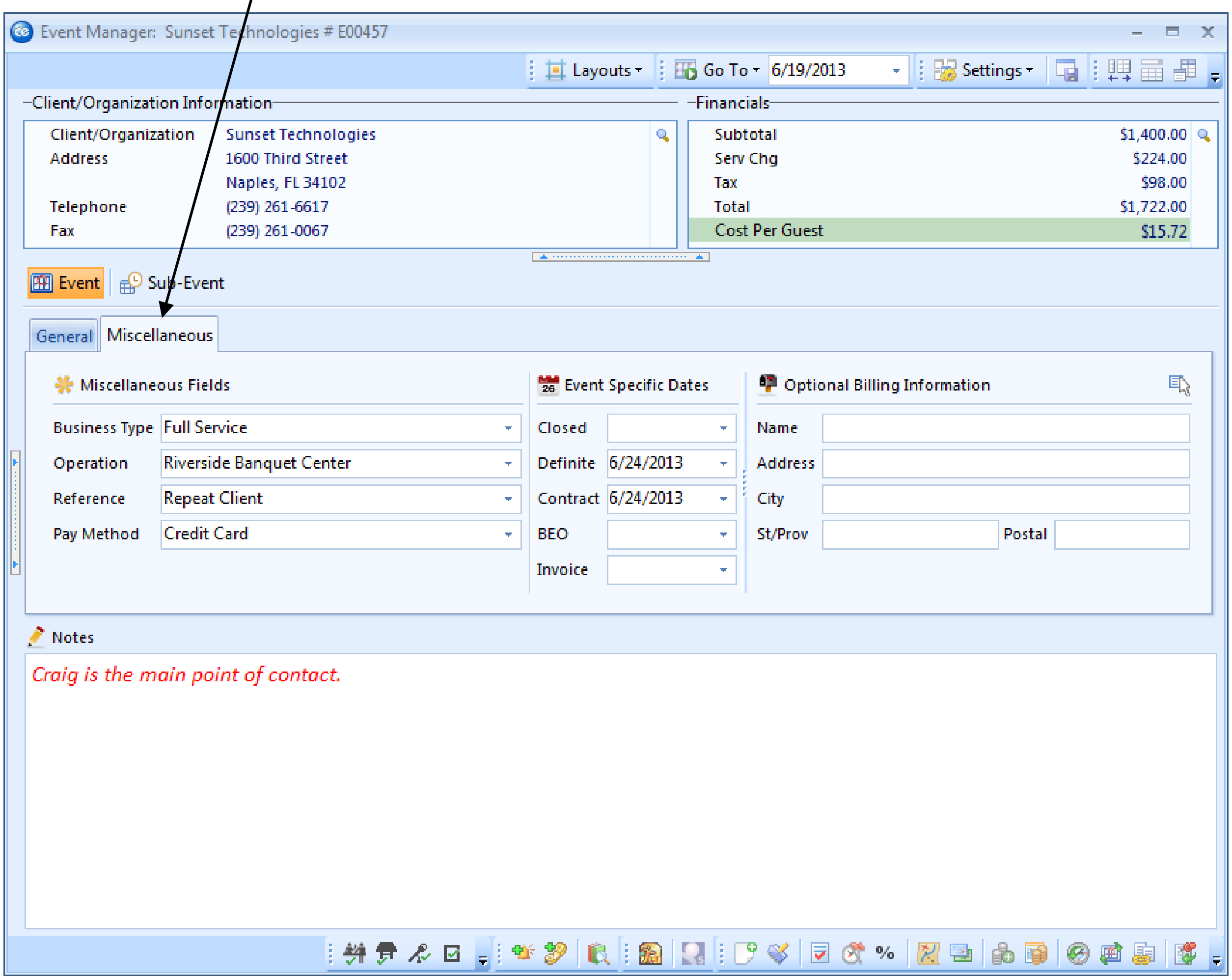
Event Manager Miscellaneous Tab

What kind of information do I store on the Miscellaneous tab?
The **Miscellaneous** tab of the Event Manager offers fields to store other important event data, such as payment method, cancellation charge, and even user-defined fields (fields that you can make up and use as needed).

Filling out the Miscellaneous Tab

1. Click the **Miscellaneous** tab in Event Manager.
2. Enter a Business Type, Operation, Reference, and Pay Method by typing into the field provided or clicking the down arrow and selecting from the corresponding drop-down (quick-pick) lists.
   Note: *Quick-pick lists are created by you. See the section on Setup for more information.*
3. **[Optional]** Fill in the optional billing information, if desired. These fields might be used if someone else is paying for the event other than the person who is listed on the account.
4. **[Optional]** Fill in any Event-Specific Dates. Booked and Revised dates automatically default (on the **General** tab), Definite and Closed dates will default (on the **Miscellaneous** tab); print dates (Contract, Invoice, BEO) can optionally default if you choose to do so in the program's Global Settings.

*Click the **Miscellaneous** tab for more data-entry tools*



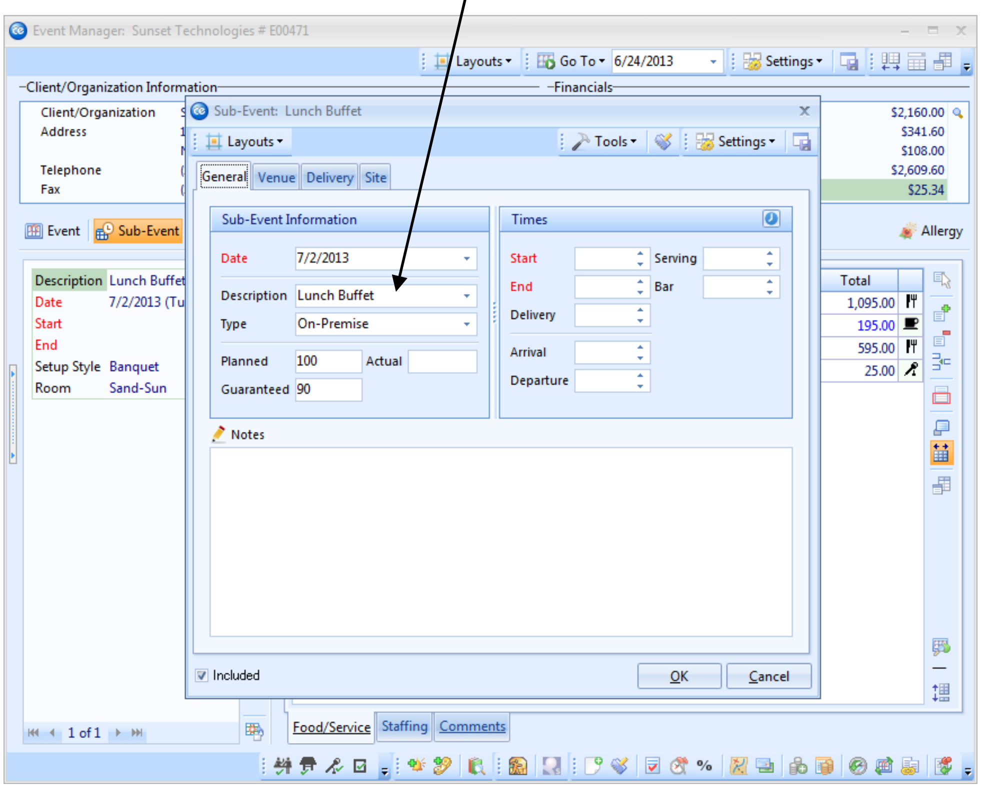
Adding a Sub-Event

How many sub-events can an order have?
You can make as many sub-events as you want for each event. Perhaps an event is set to take place over several days, and each day might be a separate sub-event. Perhaps you want to make some menu adjustments, without losing your current menu choices. You can do this by treating sub-events as proposals, opting to use only the one your customer chooses. Every event must have at least one sub-event, since this is the place where you enter such data as event times and location.
Note: *This topic discusses adding a new event manually from within Event Manager. As an option, see the chapter on using the Event Wizard.*

How to Add a Sub-Event

1. Click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.
2. Click the **Add A New Sub-Event** button , located on the sub-event panel, which is the icon just below and to the right of the **Sub-Event** tab.
3. ***Note:*** *The following pages describe entering data in the New Sub-Event window, shown below. You can optionally hold your [**Shift**] key down as you click the **Add A New Sub-Event** button to prevent the New Sub-Event Details window from appearing, then edit fields in the blue sub-event grid on the left-hand side of your Event Manager screen.*
4. Click the down arrow to the right of the Description field and select a description for the sub-event.
5. Fill out the remaining general information using the following guidelines:
   - For fields with associated quick-pick lists (Description, Type), click the down arrow (at the right of each field) to view the list, then just click a selection from the list. (If no quick-pick list exists, see the section on Setting up Quick-pick lists.)
   - For guest fields (Planned, Actual, etc.), simply click into the field and type.
6. If you do not wish to include this sub-event on the contract for this event (for example, if it was created as an optional proposal) remove the check mark from the **Included** checkbox at the bottom left of the sub-event window.

Fill out General Information



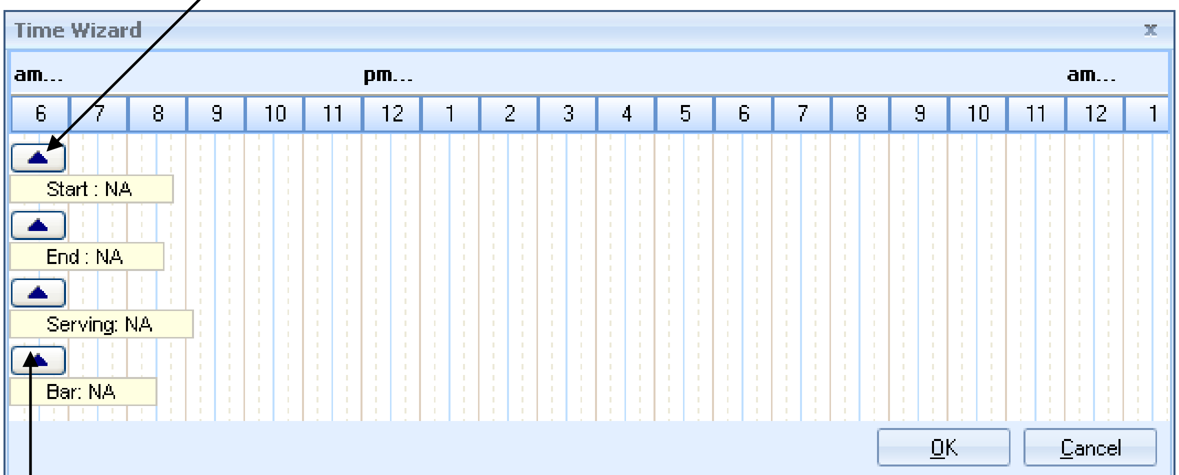
Time Wizard

What is a Time Wizard?
The Time Wizard is a shortcut way to enter times for a sub-event using your mouse rather than the number keys on your keyboard.

Using the Time Wizard

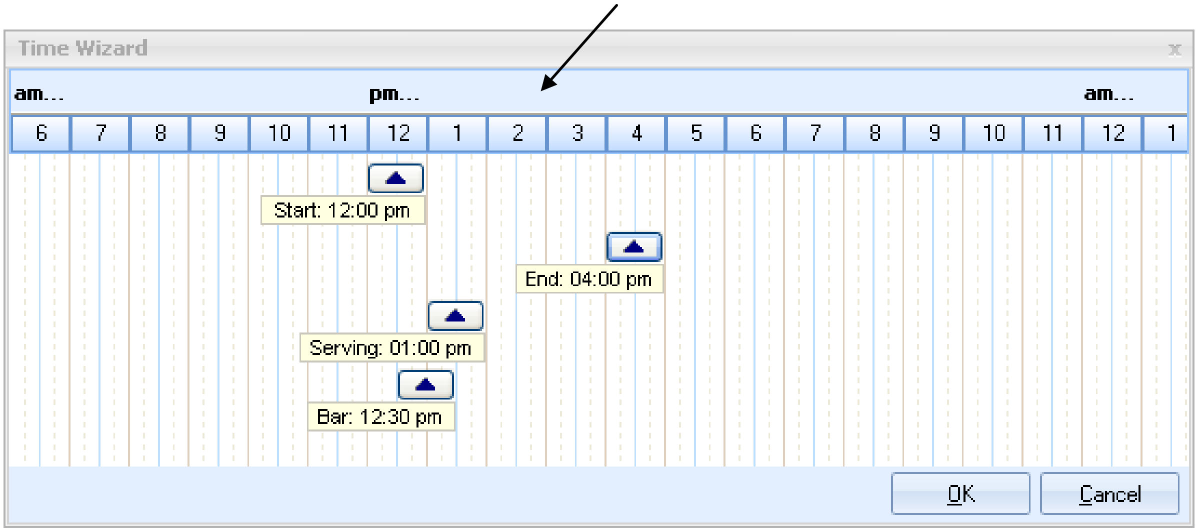
1. At the top right of the Sub-Event details form, click the **Time Wizard** button .
2. Click one of the time setting arrows, hold your left mouse button down, and drag to the left or right.
3. Release the mouse button when a time is set as you want it.
4. Remove a time by clicking the time-setting arrow with your right mouse button.
5. Click **OK** when finished.
6. To remove one of the times from the Sub-Event details screen, click on it with your right mouse button, or simply highlight the text on the **Sub-Event** tab of Event Manager and press your **[Delete]** key.

Drag-and-drop time bars



Right-click to remove time

Sample

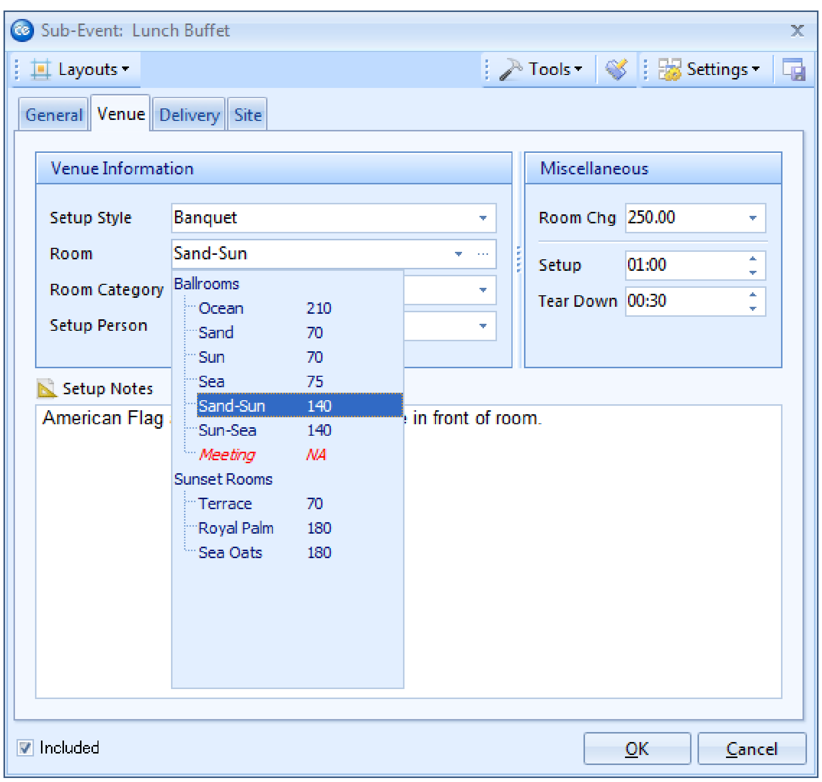


Selecting a New Room

What is meant by "on premise" versus "off premise"?
You would consider an event "on-premise" if it were being held on your property, such as in a banquet room. An event is "off-premise" if you are delivering food and supplies to another location. Entering room information for on-premise events allows Caterease to both block that room space and check for any conflicts. Entering site location information is helpful for those events that are off-premise. Both sets of information can be entered in the Sub-event form.

Adding Banquet Rooms

1. In the Event Manager, click the **Sub-Event** button, next to the **Event** button on the left-hand side. Select a sub-event from the Sub-Event list on the left-hand column of the screen.
2. Click the **View/Edit Current Sub-Event** button , located just to the right, in the list of icons.
3. Click the **Venue** tab.
4. Click the arrow to the right of the Setup Style field and select a setup style from the corresponding quick-pick list.
5. Click the down arrow located at the right of the Room field and select a room from the corresponding quick-pick list.
   Note: *The number next to each room name indicates the maximum capacity of guests in that room for the selected setup style. "NA" indicates that the selected setup style is not recognized for that room.*
6. **[Optional]** Click in the Room Category field and select a room category from the corresponding drop-down list.
7. **[Optional]** Click in the Setup Person field and select the person responsible for the setup, from the drop-down list.
8. **[Optional]** Click in the Room Charge field and enter an optional room charge, or simply accept the default.
9. Press your **[Enter]** key.
10. Enter the amount of time needed to set up the room. Press **[Enter]** again.
11. Enter the amount of time needed to Setup and Tear Down the room, if needed. *Note: These fields can be set up to default to a certain amount of time.*
12. Click in the Setup Notes text box and type any necessary setup notes, or retrieve existing notes from your Scratch Pad (discussed later). You can format this text by clicking your right mouse button and selecting **Font**.



Room Selection Wizard

Can't the program just pick a room for me?

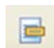
Well, that would be magic, wouldn't it? Try the Room Selection Wizard (*available in the Professional version only*). This powerful tool will consider the date, time, setup style, and guest count of the party you are booking, and will automatically choose the best matching room for the designated criteria. It will even show all other rooms and whether or not they are available.

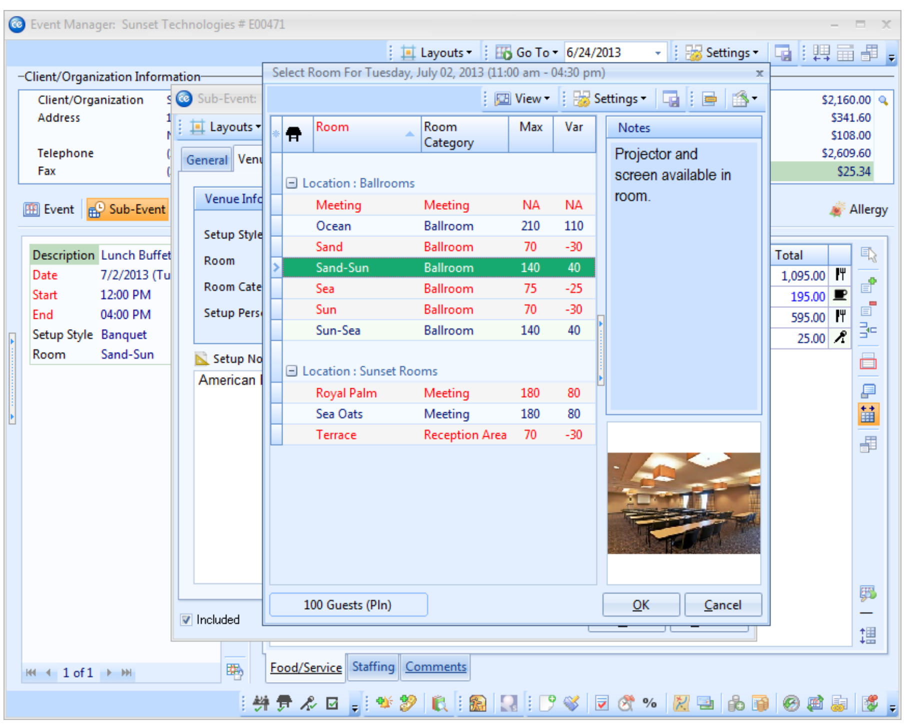
Accessing the Room Selection Wizard

1. In Event Manager, retrieve or add an event.
2. Click the **Sub-Event** button, located next to the **Event** button.
3. Add or retrieve a sub-event.
4. Fill out date, guest count, and time information.
5. Click the **Venue** tab.
6. Click the **Room Selection Wizard** (ellipse) button next to the Room drop-down. The best matching room for your sub-event will be highlighted in green.

Using the Room Selection Wizard

Below are some suggestions for using the Room Selection Wizard:

- Click **OK** to accept the selected room, or simply double-click the room name.
- Select another room, setup style, or both, if desired, and click **OK**.
- Click the **View Conflicts** button  to view the reasons certain rooms are unavailable (highlighted in red).
- Click the **View** menu to optionally display room notes and picture or associated breakout rooms and setup styles.
- Click the **Settings** button for other options for the Wizard, such as allowing the selection of unavailable rooms, automatically showing the recommended room, or showing grid lines.
- Click **Settings > Conflict Settings** to optionally have the Wizard track booking conflicts or capacity conflicts.
- Click the **Refresh** button to refresh the Wizard screen after optional settings have been changed.
- Click the **Quick Column Customizing** button in order to add or remove other columns of information to the Wizard display, including room charge, default diagram, location, etc.



Copying Setup Notes from the Scratch Pad

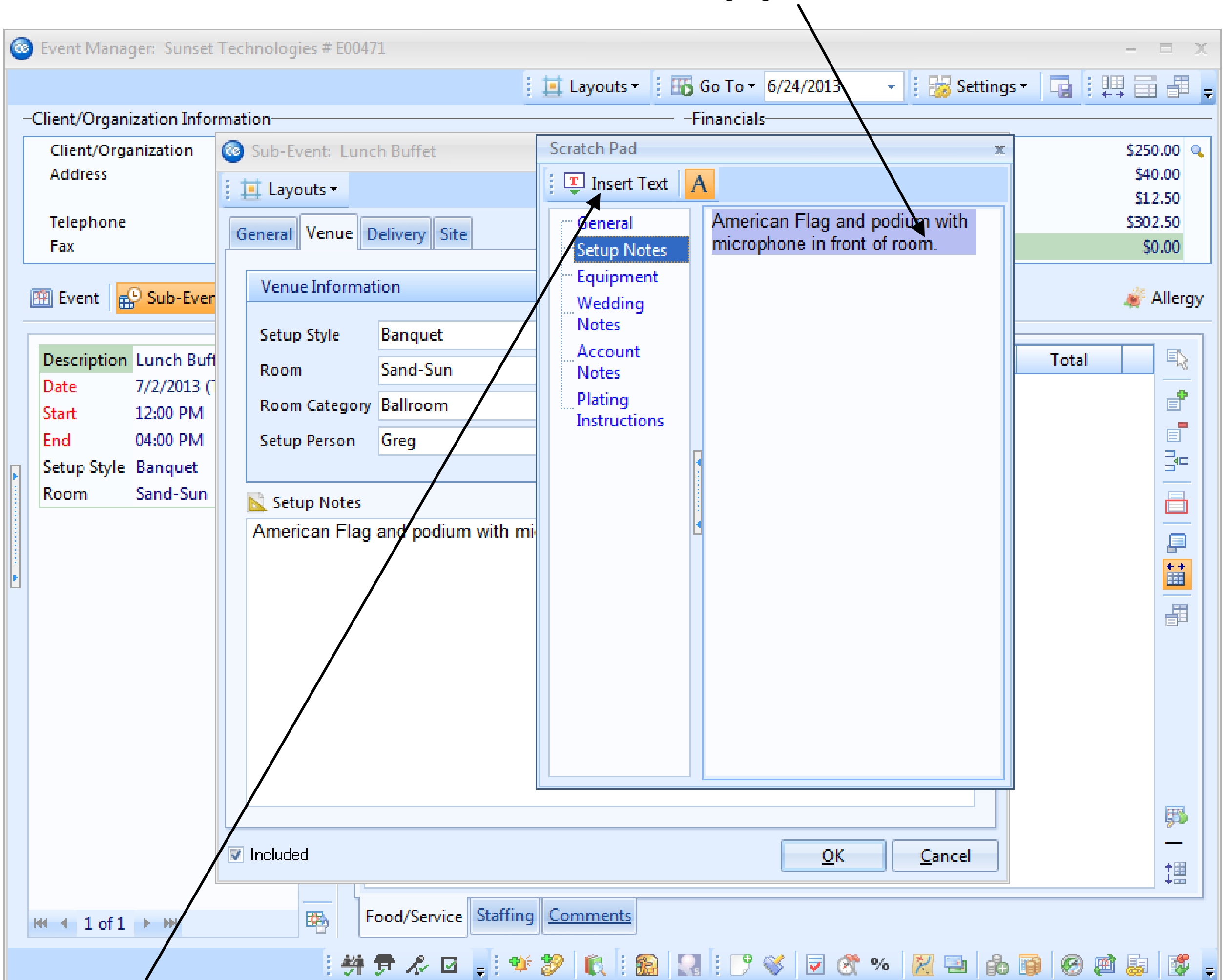
What are Setup Notes?

The *Setup Notes* in Event Manager is a place for you to enter the special setup requests of your customers. These notes will print on your Contract and BEO, but can be suppressed, if desired.

Copying from Scratch Pad

1. Click into the Setup Notes area, located on the **Venue** tab.
2. Click the **Scratch Pad** button , located at the top of the Sub-Event window.
3. Highlight the text you want to copy and press the **Insert Text** button.
4. Format the text by highlighting it, clicking your right mouse button, and selecting **Font**.

Highlight desired text



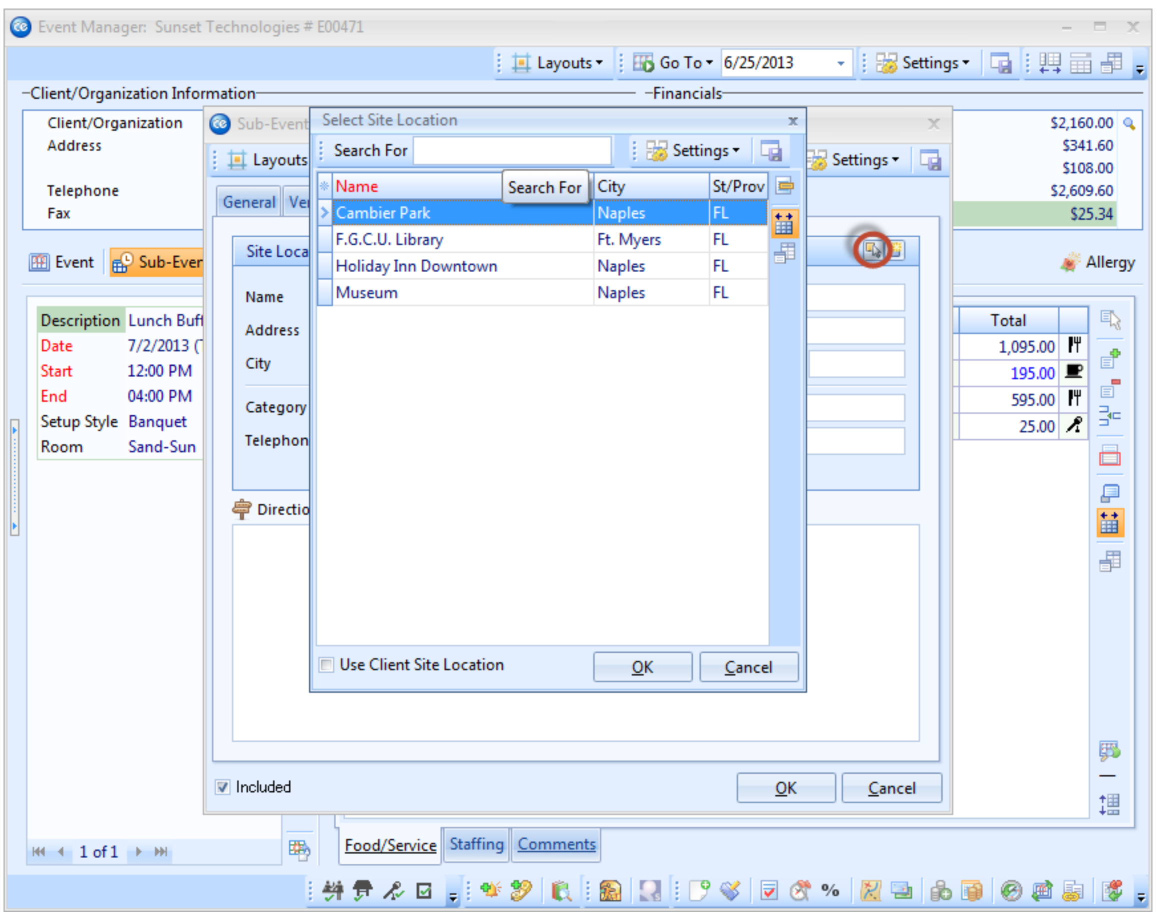
*Click the **Insert Text** button to insert the highlighted text*

Working with Site Location and Directions

Where do I enter site location information?
If a function is held off-premise, that site location information is added at the sub-event level.

Adding a Site Location

1. In Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.
2. Select a sub-event from the sub-event list on the left-hand column of the screen.
3. Click the **View/Edit Current Sub-Event** button  , located just to the right.
4. Click the **Site** tab at the top of the Sub-Event detail form.
5. Click into the Name field.
6. Type the name and address of the site and then click the **Save Site Location** button  or click the **Select Site Location** button  to retrieve an existing site location.
   ***Note**: You may also click the **Tools** button and select **Site Location** > **Copy From Client** to copy the site location from the Client address.*
7. [**Optional**] Click into the Category field and type a category or select an option from the drop-down list.
8. [**Optional**] Enter the website address into the Website field.
9. Type in the Directions text box as desired. Format this text by clicking your right mouse button and selecting **Font**.
10. When finished, click the **OK** button to add the site location and directions to the Site Locations Database.



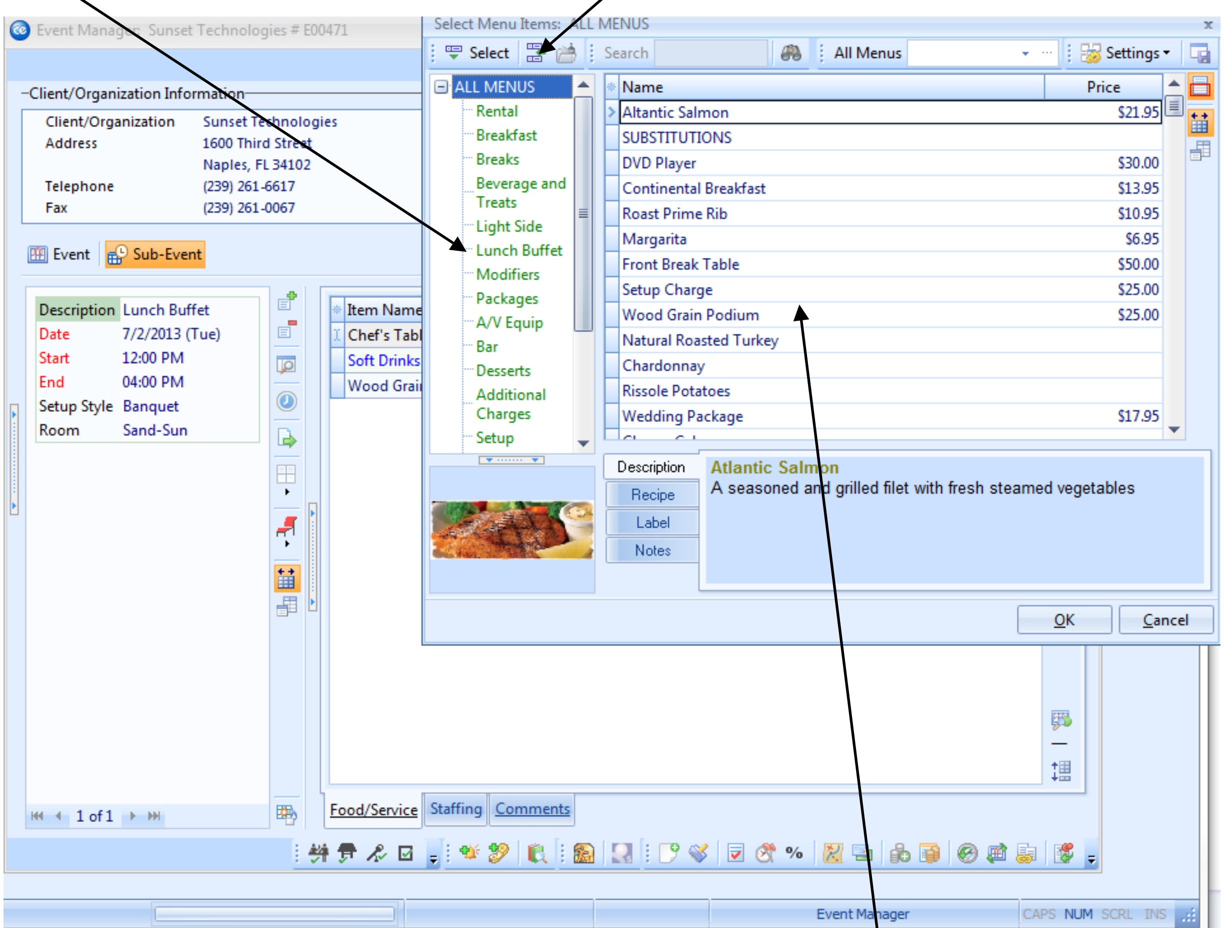
Selecting Food/Service Menus

Where do I add menu items?
Menu items are added to a function at the sub-event level, on the **Food/Service** tab.

Retrieving Food/Service Items

1. Click the **Display Menus** button , located to the right of Item Name on the Sub-Event display, and the Select Menu Items window will open.
2. Drop items from your menus into the sub-event using the following guidelines:
   - double-click a single item in the menu window to insert that item and leave the Menu window open
   - hold your left mouse button down and drag over several items to select more than one item at a time
   - hold down the **[Ctrl]** key on your keyboard and click several items to select non-contiguous items
   - click **OK** to insert the currently selected items and close the menu window
   - click and hold your mouse button down on an item or the last item in a group to drag those items from your menu onto your **Food/Service** tab
   - click **Select Items** to insert the currently selected items and leave the menu window open
3. Rearrange items on your **Food/Service** tab in any order you want by dragging and dropping them.
4. Add or modify descriptions by clicking the **Descriptions** button . ***Note:*** *Descriptions can also be included in prints.*

Select the desired menu ***Insert Mode*** *lets you add items anywhere on the Food/Service tab*



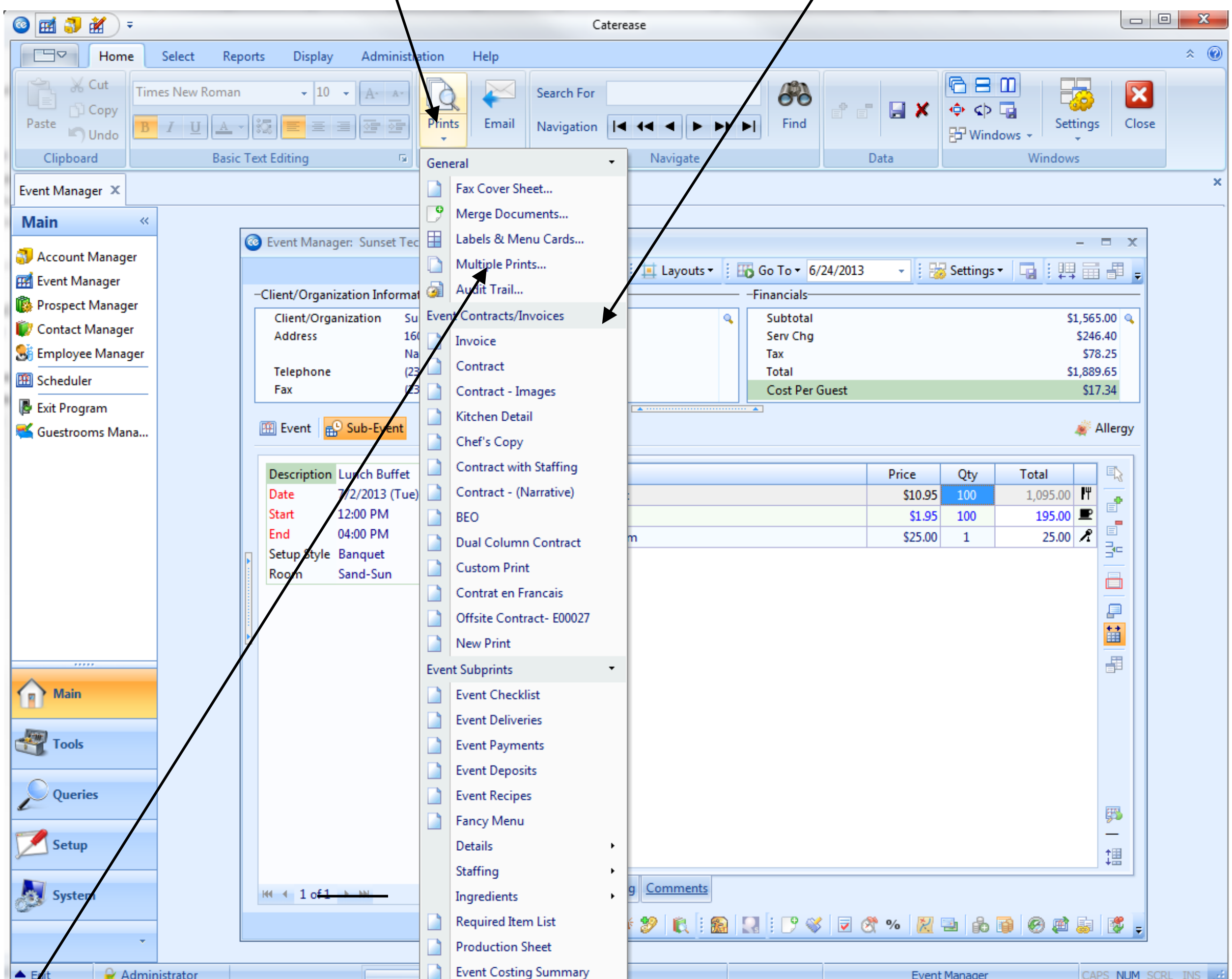
Retrieve the desired items

Generating a Print

Printing a Print

1. While in Event Manager, click the **Home** ribbon tab, and click the bottom half of the **Prints** button. ***Note:*** *The* ***Prints*** *button is a split button. (Click the top half to select prints from a floating window.)*
2. Select General, Event Contracts/Invoices or Event Subprints.
3. Click the desired print.
4. On the Print Preview screen that opens, click the **Print** button.

Select any desired print from the Print menu *Contracts, Invoices, etc., can be printed for this event*



Selecting Multiple Prints allows you to print more than one print at a time

E-mailing a Print (See image on next page)

Can I e-mail a print directly from Caterease?
More easily than you can even dream possible! Plus, if you own the Marketing Tools add-in to the program, you can use one of your custom merge letters as the body of the outgoing e-mail!

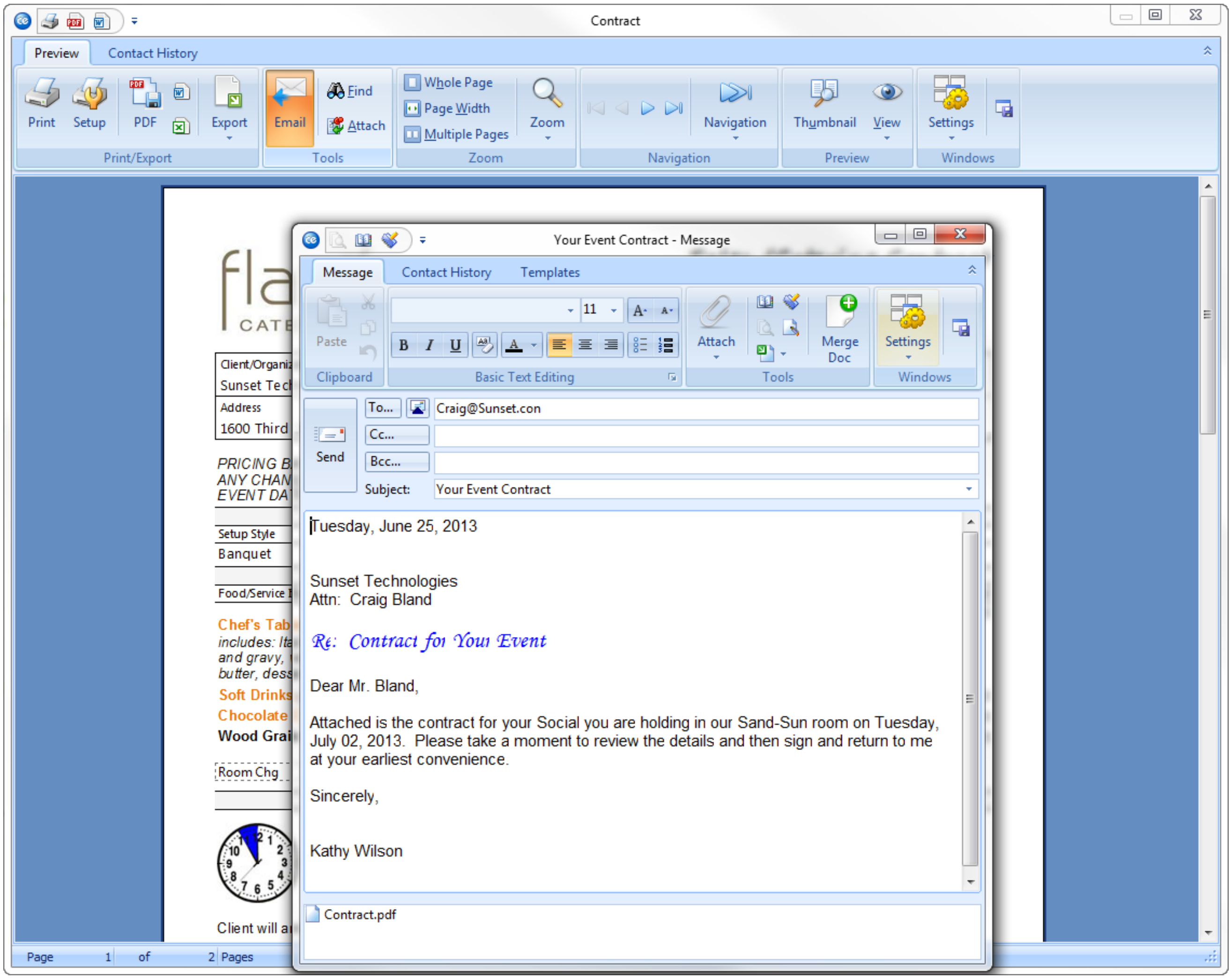
Emailing a Print

1. Click the **Email** button at the top of the Print Preview screen.
   Note: *Notice that the print is automatically attached as a .PDF at the bottom of the e-mail window. You can change the format of this attachment by clicking it with your right mouse button and selecting **Change Type To** and choosing a different type.*
2. Type the recipient's e-mail address in the To field, or click the word **To** or the **Address Book** button at the top of the window to access the Caterease address book.
   Note: *The Caterease address book automatically lists all contact people for the current customers who have corresponding e-mail addresses on file, as well as staff scheduled to work the event and a custom personal list of addresses.*
3. **[Optional]** Enter additional e-mail addresses in the Cc and Bcc fields, separating each address by semi-colons.
4. Type a subject for the e-mail in the Subject field, or click the down arrow at the right of the field to access the customizable quick-pick list.
5. Click in the large white text block of the e-mail window and type the body of your e-mail, or optionally insert a custom merge letter (see below).
6. **[Optional]** Format the body of the e-mail by using the formatting tools at the top of the screen. Alternatively, highlight any text within the body of the e-mail, click your right mouse button, and choose **Font**.
7. When finished, click **Send** at the top left-hand side of the window to send the e-mail.

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

Using a Merge Letter as the Body of an E-mail (See image on next page)

1. Click the **Use Merge Document** button, located at the top of the e-mail window.
   Note: *You must own the Marketing Tools add-in to the program to use this feature.*
2. Select a merge letter to use as the body of the e-mail.
3. Click **OK**.
   Result: *The letter that you've chosen becomes the body of your current e-mail, and all merge fields merge in appropriate information from this event.*
   Note: *As an alternative, you can double-click the title of the letter to insert it.*


Contract
Preview
Contact History
Print
Setup
PDF
Export
Email
Find
Attach
Whole Page
Page Width
Multiple Pages
Zoom
Navigation
Thumbnail
View
Settings
Print/Export
Tools
Zoom
Navigation
Preview
Windows
Your Event Contract - Message
Message
Contact History
Templates
Paste
Clipboard
Basic Text Editing
Attach
Merge Doc
Tools
Settings
Windows
Send
To...
Craig@Sunset.con
Cc...
Bcc...
Subject:
Your Event Contract
Tuesday, June 25, 2013
Sunset Technologies
Attn: Craig Bland
Re: Contract for Your Event
Dear Mr. Bland,
Attached is the contract for your Social you are holding in our Sand-Sun room on Tuesday, July 02, 2013. Please take a moment to review the details and then sign and return to me at your earliest convenience.
Sincerely,
Kathy Wilson
Contract.pdf
Page 1 of 2 Pages

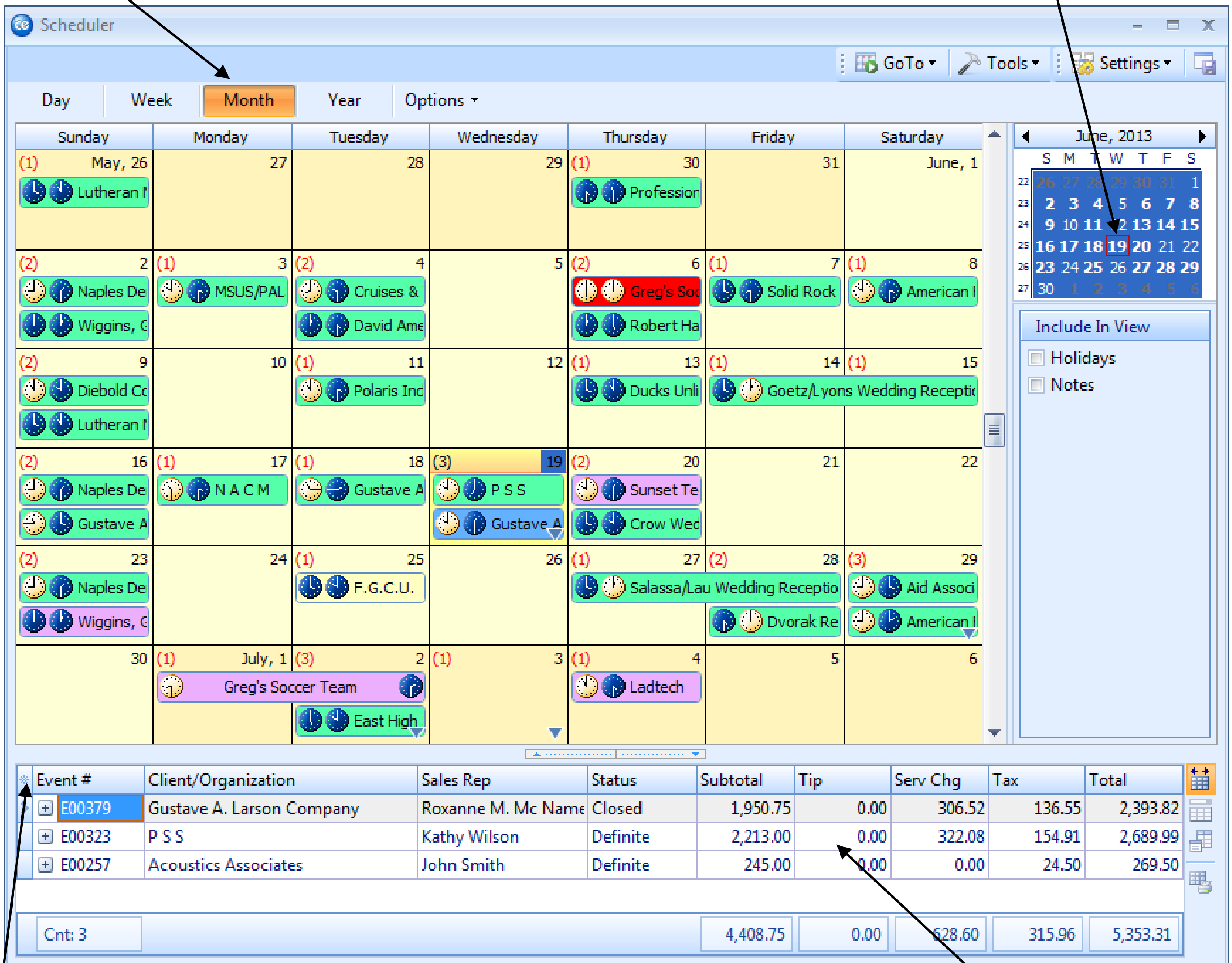
Unit 4: Event Scheduler

Topics covered in this unit include:

Opening the Scheduler
Changing Scheduler Views
Grouping the Scheduler
Adding Notes to the Scheduler
Retrieving Events from the Scheduler

The Event Scheduler Screen

Month View *Current day is highlighted*



Use the Quick Column Customizing button to customize the grid *The grid shows the current day's events*

Event Scheduler Introduction

The Event Scheduler is a graphic calendar tool designed to give you an instant indication of the goings-on at your facility. The Scheduler can be optionally displayed in a year-at-a-glance view, month-at-a-glance view, a week-at-a-glance view, a day-at-a-glance view, or a custom work-week-at-a-glance view.

The bars on the Scheduler screen can be color-coded based on an event's Status, Event Category, Sales Representative, or Business Type. In addition, you can have additional data (guest count, theme, financial information, etc.), display in the bars on the Event Scheduler screen when in Day view or Work Week view.

As with any grid in Caterease, the grid at the bottom of the Scheduler can be customized to suit your needs. Details of any highlighted day or days will be displayed in this grid. Using your left mouse button, drag your mouse pointer over several days to highlight them and show their details in the grid. Grid columns can be customized, data can be sorted or grouped, and custom grids can be exported or printed as custom reports.

Changing Scheduler Views

What types of views does the Scheduler offer?
You can choose to look at events in your Scheduler in Month view, Week view, Day view, or even a Year view. In addition, you can choose whether you are looking at only event details, sub-event details, and whether Staffing or Reminders are shown on the display.

Using the Month View

1. Click the **Month** button 

at the top of the Scheduler, if it is not already selected.
2. Change months by clicking the right or left arrows on the top of the Date Navigator (the small monthly calendar located to the right of the Scheduler screen).
*Note: As an alternative, click a specific date in the Navigator, and then click the **Month** button to view that entire month. For example, click October 20 in the Navigator and then click the **Month** button to view the entire month of October.*

Using the Day View

1. Click the **Day** button 

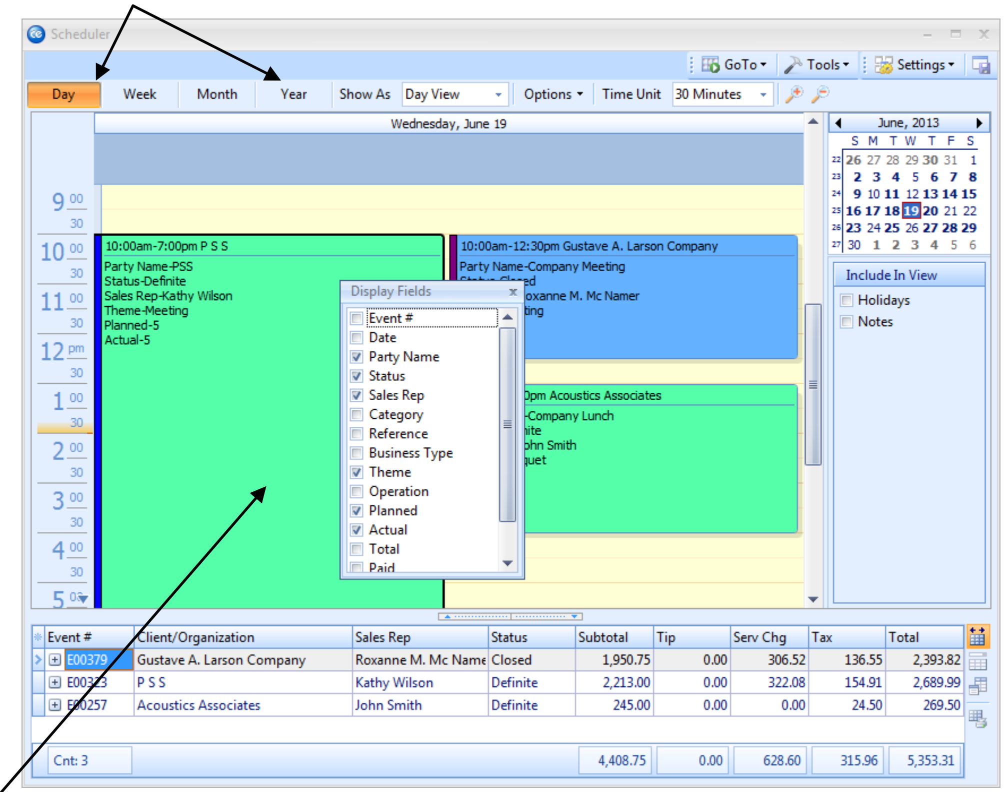
at the top of the Scheduler screen.
Note: *Optionally display event details by right-clicking any bar on the Scheduler screen (with an event) and selecting **Set Display Fields.***
2. Change days by clicking on any date in the Date Navigator.
3. Optionally display multiple dates simultaneously by holding your **[Ctrl]** key down as you click multiple dates.

Using the Week View

1. Click the **Week** button 

at the top of the Scheduler screen.
Note: *To customize your week, click **Show As** > **Work Week** (or) **Full Week** > **Options**.*
Note: *No matter which day you click on in the Date Navigator, the Scheduler will automatically display the corresponding day when it is set in Work Week view. Also, see note on **Set Display Fields**, above.*

Choose from among Day, Week, Month, or Year views



Right-click to add event details to the display

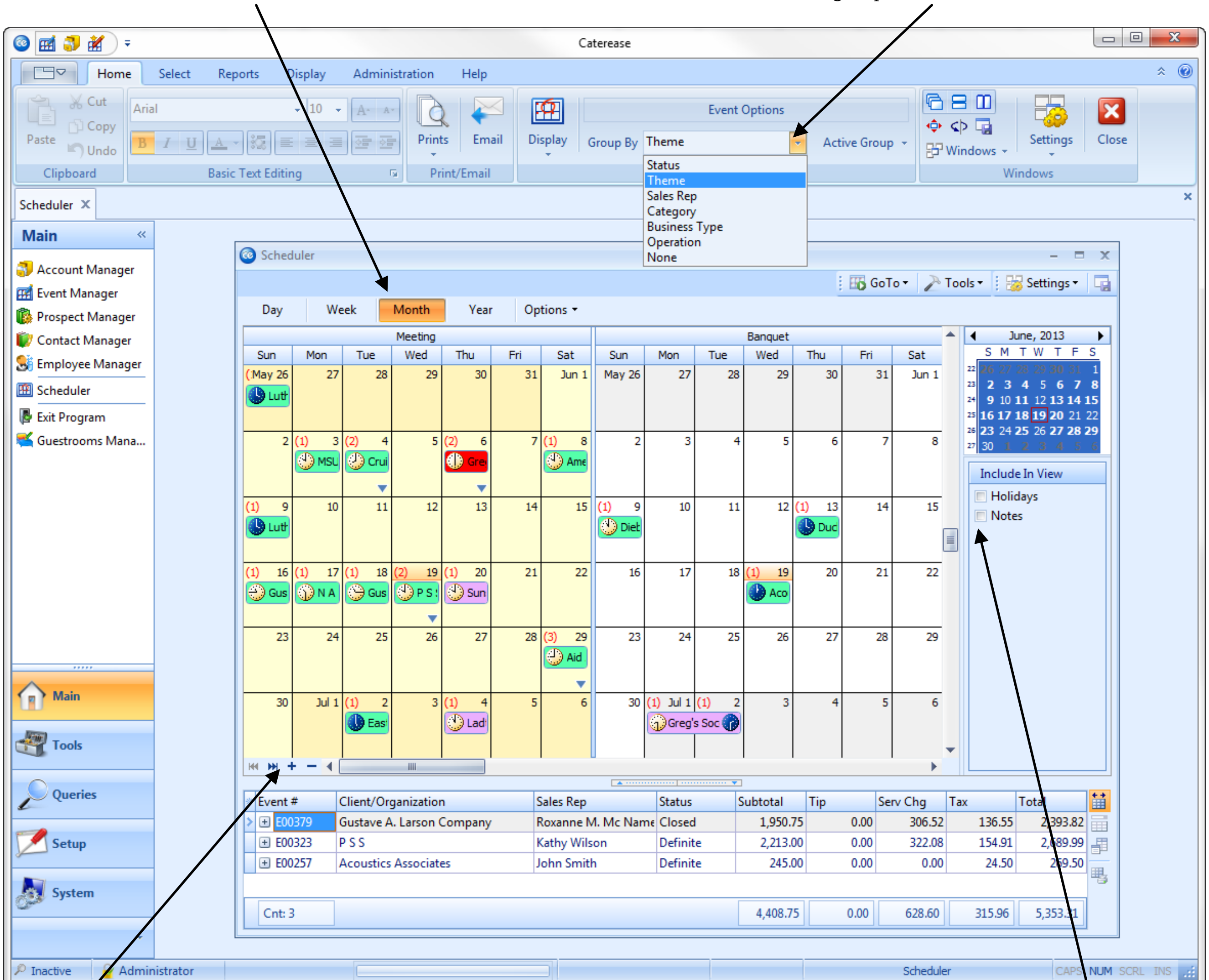
Grouping the Calendar

Can I separate groups of events into different calendars?
Believe it or not, you can! The powerful grouping option in the Scheduler lets you create separate calendars of events based on a variety of general event details.

Customizing the Calendar

1. If you haven't already, click the **Scheduler** button on the **Main** sidebar group to open the Scheduler tool.
2. Click the down arrow to the right of the **Group By** option at the top center of the ribbon area.
3. Select any detail from the list to separate your events into groups. Choose from among Status; Theme; Sales Rep; Category; Business Type; Operation, or accept None as the default.
4. **[Optional]** Click the **Day**, **Week**, **Work Week**, **Month**, or **Year** button to view your groups in that display.
5. **[Optional]** Use the plus and minus sign buttons in the navigation bar at the lower left-hand corner of the calendar to add or remove calendars, respectively, from your current view.

Month View *Click the down arrow to group the calendar*



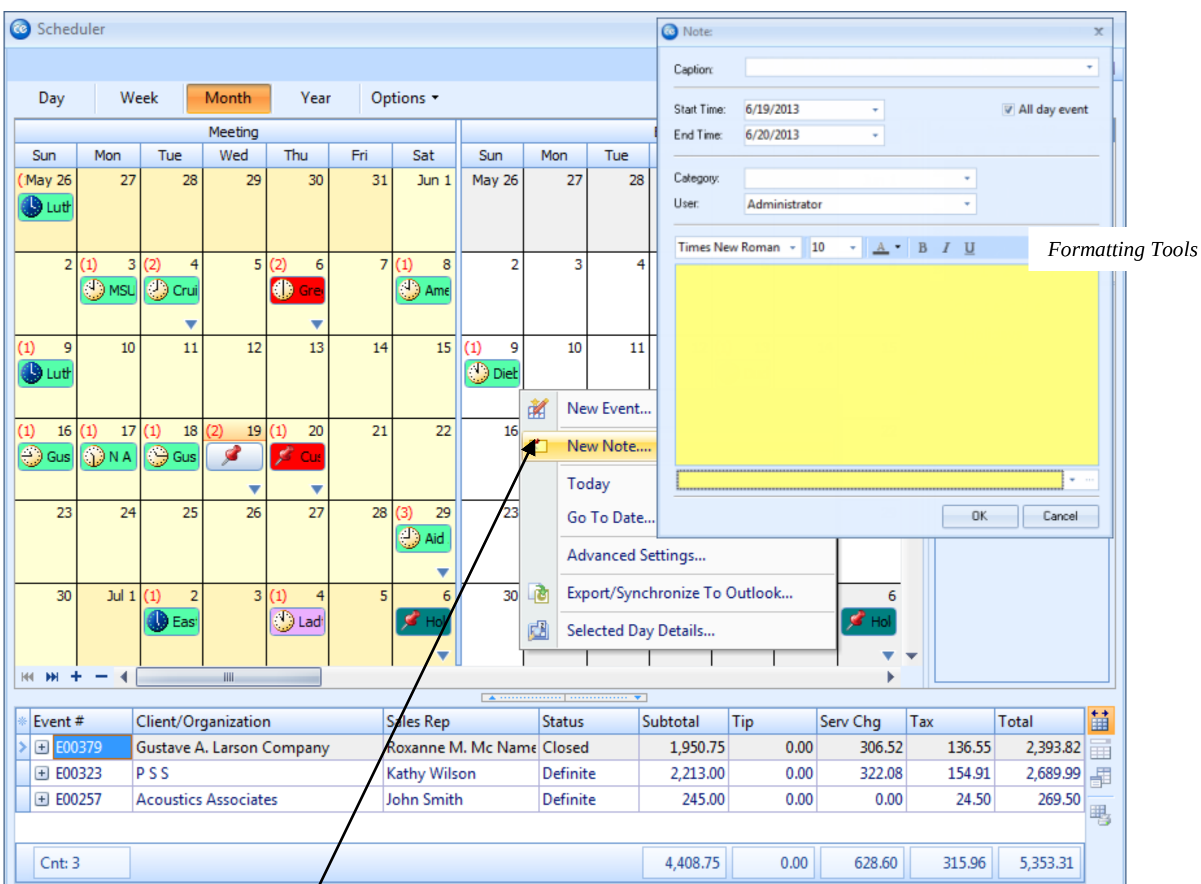
Use the plus and minus sign to view more or fewer themes *Click in the checkbox to show Holidays or Notes*

Adding Notes to the Scheduler

What if I need to make a quick note on at date on the calendar?

The Notes feature in the Caterease Scheduler lets you more or less add a "yellow sticky" on a particular date for any reason whatsoever. For example, perhaps a customer is seriously considering a date but has not booked an event with you. However, you nonetheless want to make a quick note for everyone to see. A Scheduler note is the perfect solution!

1. Confirm that the **Notes** checkbox is selected in the <u>Include In View</u> pane on the right-hand side of the Scheduler screen.
   Note: *New notes cannot be added if notes are not currently being viewed (i.e., if there is not a check in the Notes checkbox).*
2. Click your right mouse button on any date on the calendar and select **New Note**.
   Note: *If you want your note to be specific to a certain group or time, you can modify your view as described above.*
3. Type in a <u>Caption</u> for the note, or select one from the custom drop-down list.
   Note: *This caption will appear on the calendar display to identify the note.*
4. **[Optional]** Edit the <u>Start</u> and <u>End</u> dates or leave the defaults.
5. **[Optional]** Enter a <u>Category</u> for the note, or select one from the custom quick-pick list.
6. **[Optional]** Edit the <u>User</u> responsible for the note's action item, or accept the default.
7. Enter the details of the note in the large text block, and optionally modify the text as desired by using the formatting tools located at the top of the text block.
8. **[Optional]** Change the background color for the note by clicking the ellipse button at the bottom of the Note window.
   Note: *If you select a new background color, that will serve as the default background color for all notes created in the future – but obviously you can change it again as desired.*



*Right-click on a particular date to add a new note, then select **New Note***

Unit 5: Advanced Menu Features

Topics covered in this unit include:

Using the Insert Mode when Retrieving Menu Items
Retrieving Menu Packages
Adding/Modifying Menu Item Descriptions
Adding Menu Items by Hand
Customizing the Food/Service Tab
Copying Menus from Event to Event

Using the Insert Mode when Retrieving Menu Items

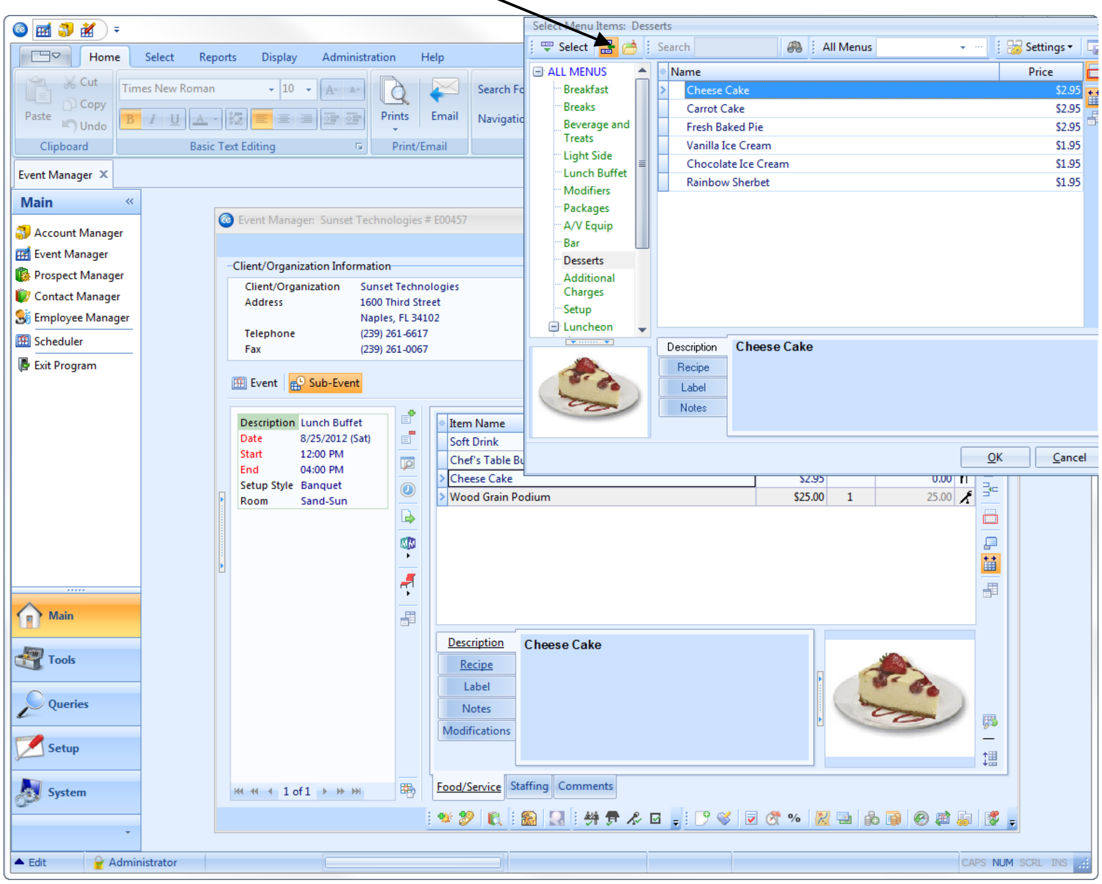
Retrieving menu items

Menu items can be retrieved into an event from your pre-existing menus or unique items can be added to an event by hand. The Insert Mode tool allows you to place an item anywhere at all on the Food/Service tab.

Retrieving items

1. Select a menu title on the left-hand side of the Select Menu Items window.
2. Select a single menu item or multiple items using the following guidelines:
   - Click an item to select it.
   - Hold your left mouse button down and drag your cursor over multiple items.
   - Click one item, hold the **[Ctrl]** button down on your keyboard and click other items.
3. Drop items from your menus onto your **Food/Service** tab using the following guidelines:
   - Double-click a single item in the Select Menu Items window.
   - Hold your mouse button down on one individual item (without moving) for a half-second and drag that item from the Select Menu Items window onto your **Food/Service** tab.
   - Hold your left mouse button down on a group of selected items and drag and drop them onto the **Food/Service** tab.
   - Click the **Select Items** button.
   - Click **OK**.
   - Click the **Insert Mode** button  to retrieve menu items in specific positions on the **Food/Service** tab of your event.
     Result: *This tool causes the selected menu items to be automatically placed above the currently highlighted item on the* **Food/Service** *tab (rather than always at the bottom); when dragging and dropping, the Insert Mode allows placement anywhere at all on the* **Food/Service** *tab.*
4. Click in the Qty column on the **Food/Service** tab and enter a quantity for each menu item.

*Click the **Insert Mode** button to place items above other items*



Retrieving Menu Packages into an Event

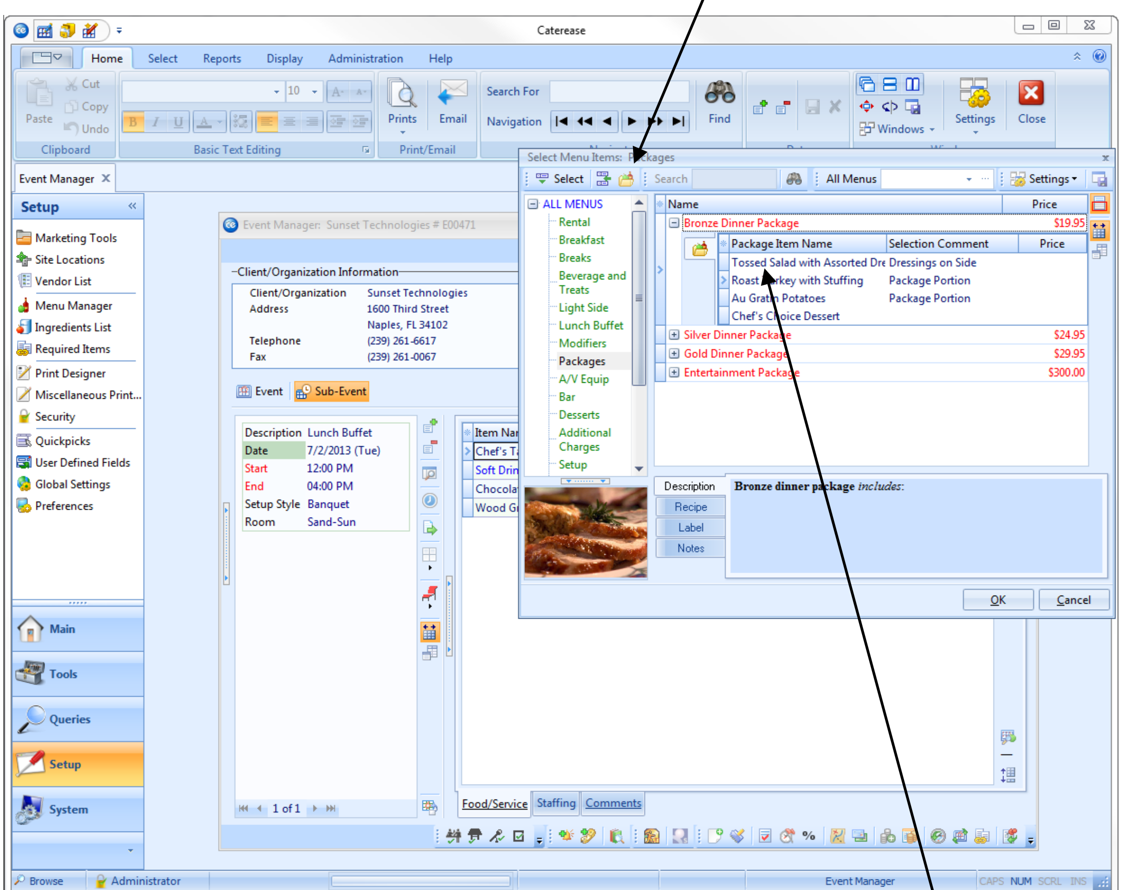
What is a menu package?

Menu packages (*available in the Standard and Professional versions*) allow you to select multiple menu items from multiple menus at one time. For example, let's say you have a "Lunch Buffet" menu, and it has an item called Supreme Buffet. This buffet consists of the Deli Sandwich Platter, found in your Platters menu, Iced Tea, found in your Bar menu, and Cheesecake, found in your Desserts menu. Three different items, three different menus. Yet, you can create a single item called “Supreme Buffet" and link all three of these items to it. That way, when you retrieve "Supreme Buffet" into an event, it can optionally come with all of its included dishes automatically.

Selecting Menu Packages

1. In Event Manager, click the **Sub-Event** button, located on the left-hand side of the screen.
2. Click the **Food/Service** tab at the bottom of the screen, if it is not already selected.
3. Click the **Display Menus** button , located on the right-hand side of the **Food/Service** tab.
4. Click **Packages**, from the left-hand side of the **Select Menu Items** window.
5. Click the **Menu Packaging** button , found at the top of the Select Menu Items window.
6. Double-click any menu package item.
   Note: *Menu packages are indicated by a small plus sign to the left of the item name. You can click this plus sign to view "sub-items" within the package, and even optionally de-select various sub-items by holding your **[Ctrl]** key down and clicking them.*

Click to enable Menu Package selection



All “Sub-Items” are selected automatically

Adding and Modifying Menu Item Descriptions

What is a menu item description?

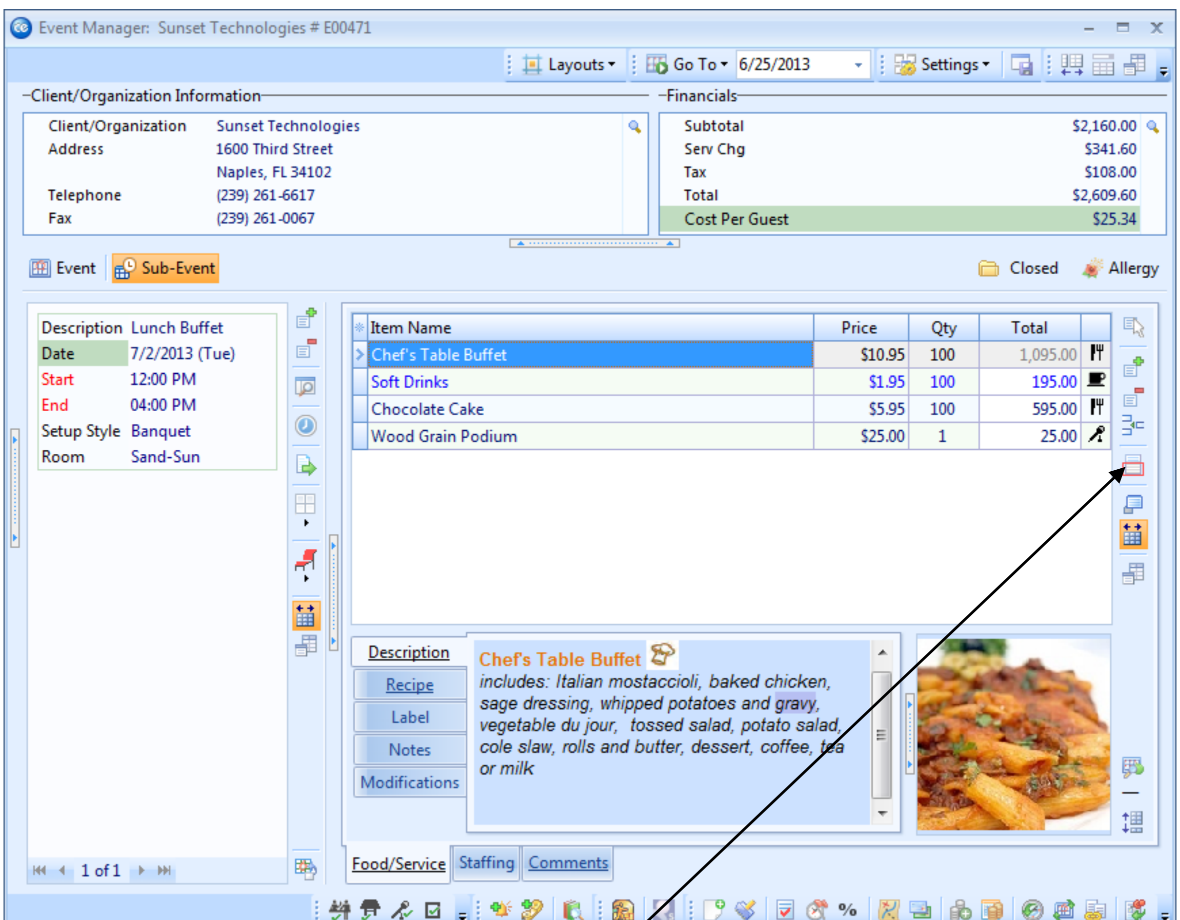
The Description of a menu item allows you to write flowing, wrapping text about a menu item and format the text any way you'd like. This description is retrieved into an event order with a menu item, or can be added on-the-fly.

Adding a Description

1. In Event Manager, select a sub-event to modify its menu.
2. Click the **Food/Service** tab at the bottom of the screen, if it is not already selected.
3. Select a menu item to edit, or click the **Add a New Food/Service Item** button on the right-hand side of the screen to add a new one.
4. Click the **Show/Hide Item Details** button . A white text box appears at the bottom of the **Food/Service** tab.
5. Click in the description text box at the bottom of the **Food/Service** tab and type as desired.

Modifying a Description

1. Select any menu item on the **Food/Service** tab.
2. Click the **Show/Hide Item Details** button .
3. Right-click into the text block and choose **Modify Description**.
4. Format the text using the Format toolbar at the top of the screen, or right-click and select **Font**.
   Tip: *If you want to return the description to the original, right-click, then choose* ***Reset Description***.



Click the ***Show/Hide Item Details*** *icon to see the menu item description*

Adding a New Food/Service Item

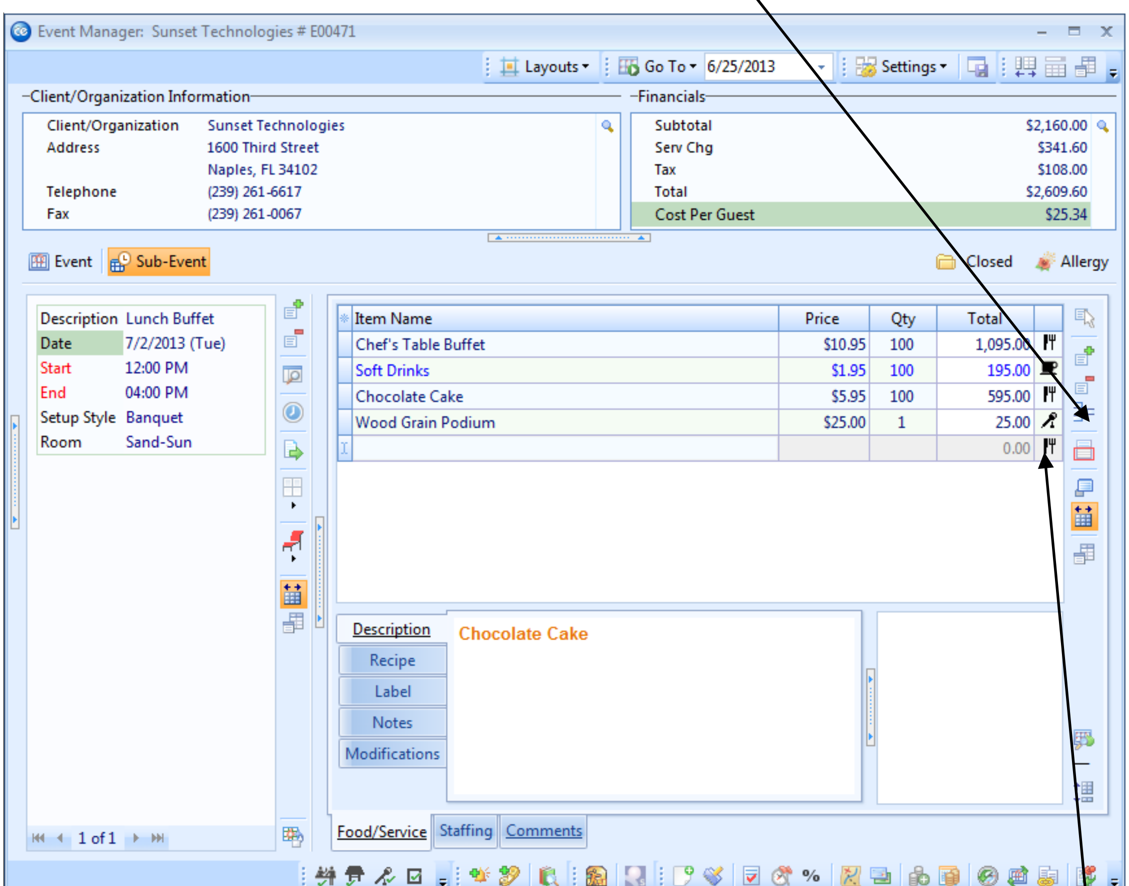
Where do I add menu items that are not already in Menu Manager?
Menu items are added to a function at the sub-event level, on the **Food/Service** tab.

Adding Food/Service Items

1. In Event Manager, click the **Sub-Event** button, located next to the **Event** button, on the left-hand side of the screen.
2. Select a sub-event from the Sub-Event list on the left-hand side of the screen.
3. Click the **Add A New Food/Service Item** button , located on the right-hand side of the **Food/Service** tab.
4. Type a name for the menu item and press your **[Enter]** key.
5. Type a price for the item, or click the down arrow at the right of the Price field to access the calculator.
6. Press your **[Enter]** key and type the appropriate quantity for the menu item into the Qty field.
7. Press **[Enter]** again and fill in other fields as desired.
8. With your new menu item still highlighted, click the down arrow next to Type (right-hand side of the **Food/Service** tab) and choose an appropriate Type for the new item.
9. Rearrange items on your **Food/Service** tab in any order you want by dragging and dropping them.

> **Tip:** As an option, you can right-click any new menu item (or modified existing item) and choose **Special Editing** > **Copy to Menu Manager** to copy this item back to your default menus (*Professional version*).

Click ***Insert A New Food/Service Item*** *to add a menu item in between existing items*



When adding a new menu item, notice that new item defaults to the TYPE settings of the Item you were on previously. Therefore, always choose/change to the correct Type.

Customizing the Food/Service Tab

Is there any other information I can display on the Food/Service tab?
Don’t forget that the **Food/Service** tab is a grid. As such, it offers you total control over what details are displayed.

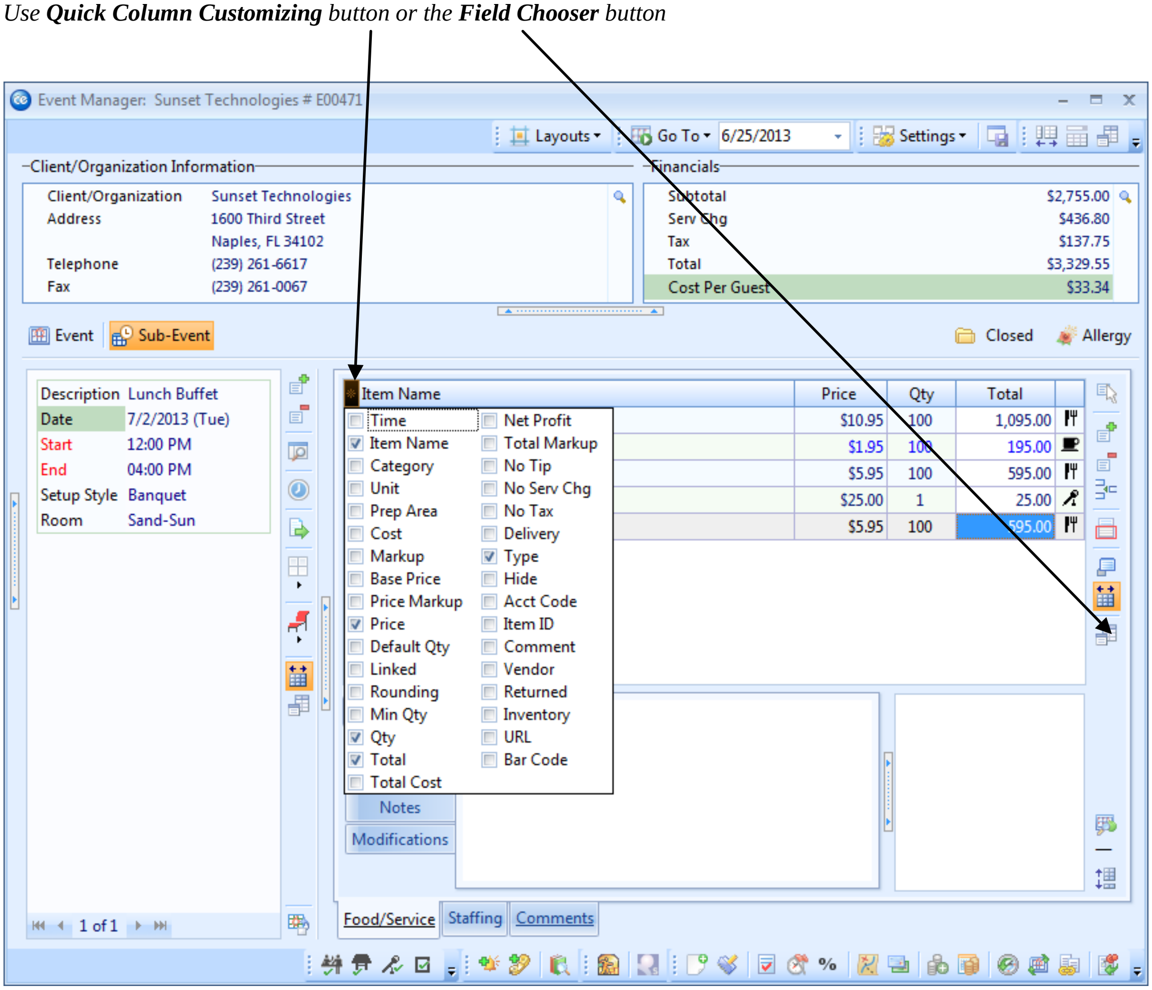
Quick Column Customizing Button

1. Click the **Quick Column Customizing** button, located at the top left-hand side of the detail grid (to the left of the first column heading), to drop down a list of optional columns.
   Note: *If this button does not appear, you must enable the feature in your program's preferences area (**Administration** > **Settings** > **Preferences**).*
2. Click the checkbox next to any optional field name to display that field in the grid.

Customizing Columns Using the Field Chooser (Optional)

1. Click the **Field Chooser** button, located on the lower right-hand side of the screen.
2. Hold your left mouse button down on a column heading in the small *Customization* window.
3. Drag your mouse pointer and drop the heading in line with other heading in the **Food/Service** tab grid.
4. Repeat to display other columns.
5. Optionally remove columns by dragging them into the small *Customization* window.
6. Close the *Customization* window when finished.
7. Click the **Save Current Window Settings** button to save your new view.

*Use **Quick Column Customizing** button or the **Field Chooser** button*

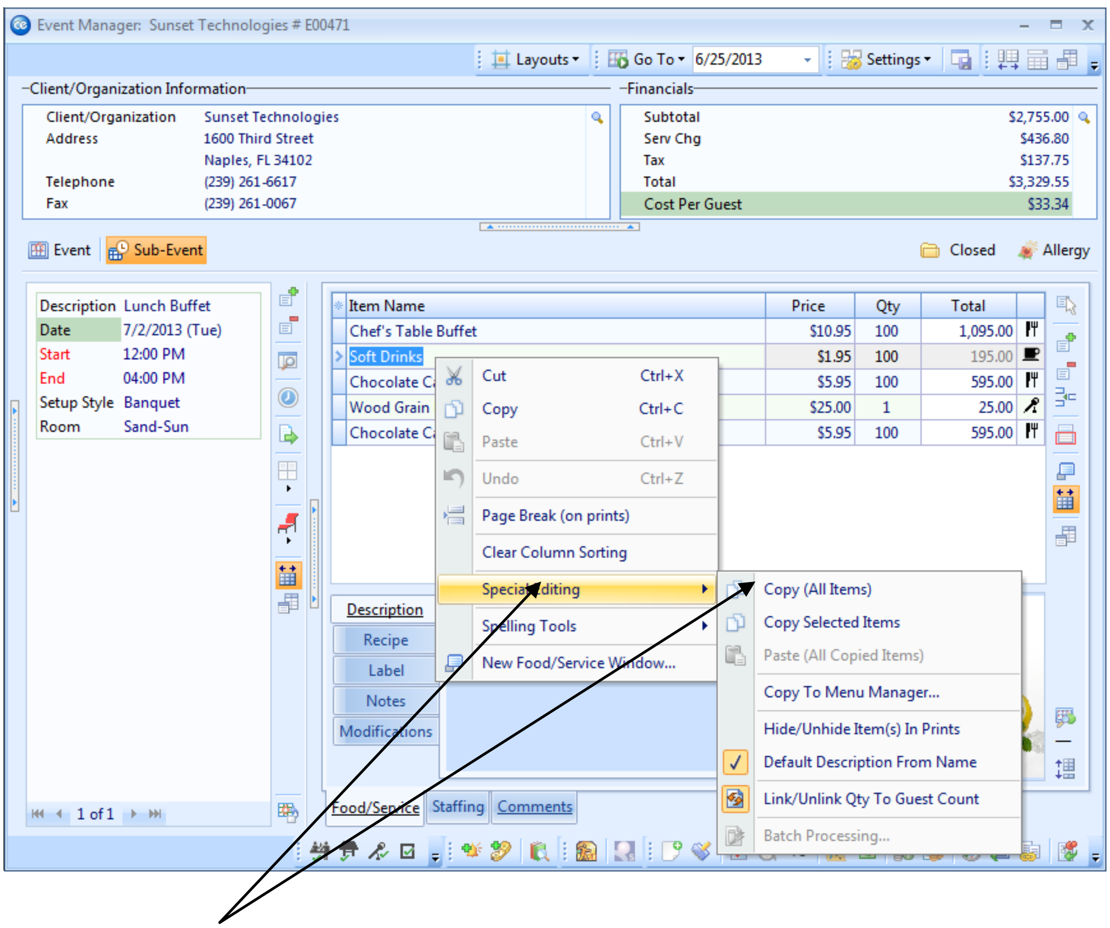


Copying Menus from Order to Order

What if one client wants the same menu another client had?
It's a Caterease motto: You should never have to type the same thing more than once. In this case, you can copy an entire menu from one order directly into another. Here's how:

Copying a Menu

1. Find the order in Event Manager with the menu you want to copy.
2. Click the **Sub-Event** button.
3. Click your right mouse button anywhere on the **Food/Service** tab.
4. Select **Special Editing - Copy (All Items)** or **Copy (Selected Items)**.
5. Retrieve the order you want to paste the menu into.
6. Click your right mouse button anywhere on the **Food/Service** tab.
7. Select **Special Editing - Paste (All Copied Items)**.
8. Indicate whether you want to replace any existing items with the items you are pasting, or whether you want to simply add to them (if applicable).

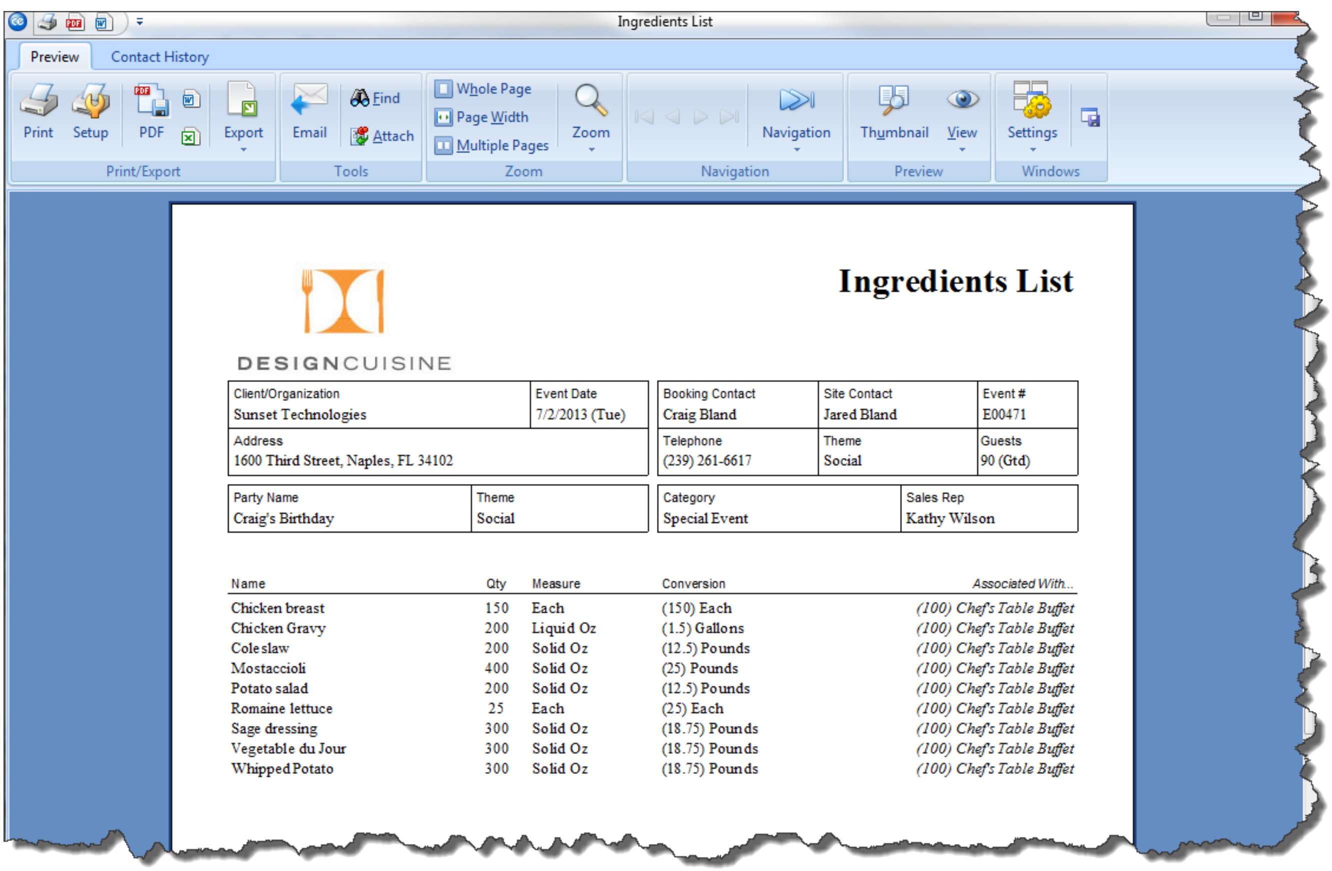


Click your right mouse button on the ***Food/Service*** *tab grid to see the list*

Generating an Ingredients List

Is there a way to generate an Ingredients List and a Required Item List for my chef?
Yes! You can generate a variety of prints directly from Event Manager, and you can customize the prints using the Miscellaneous Print Designer Tool (discussed in detail in Unit 21).

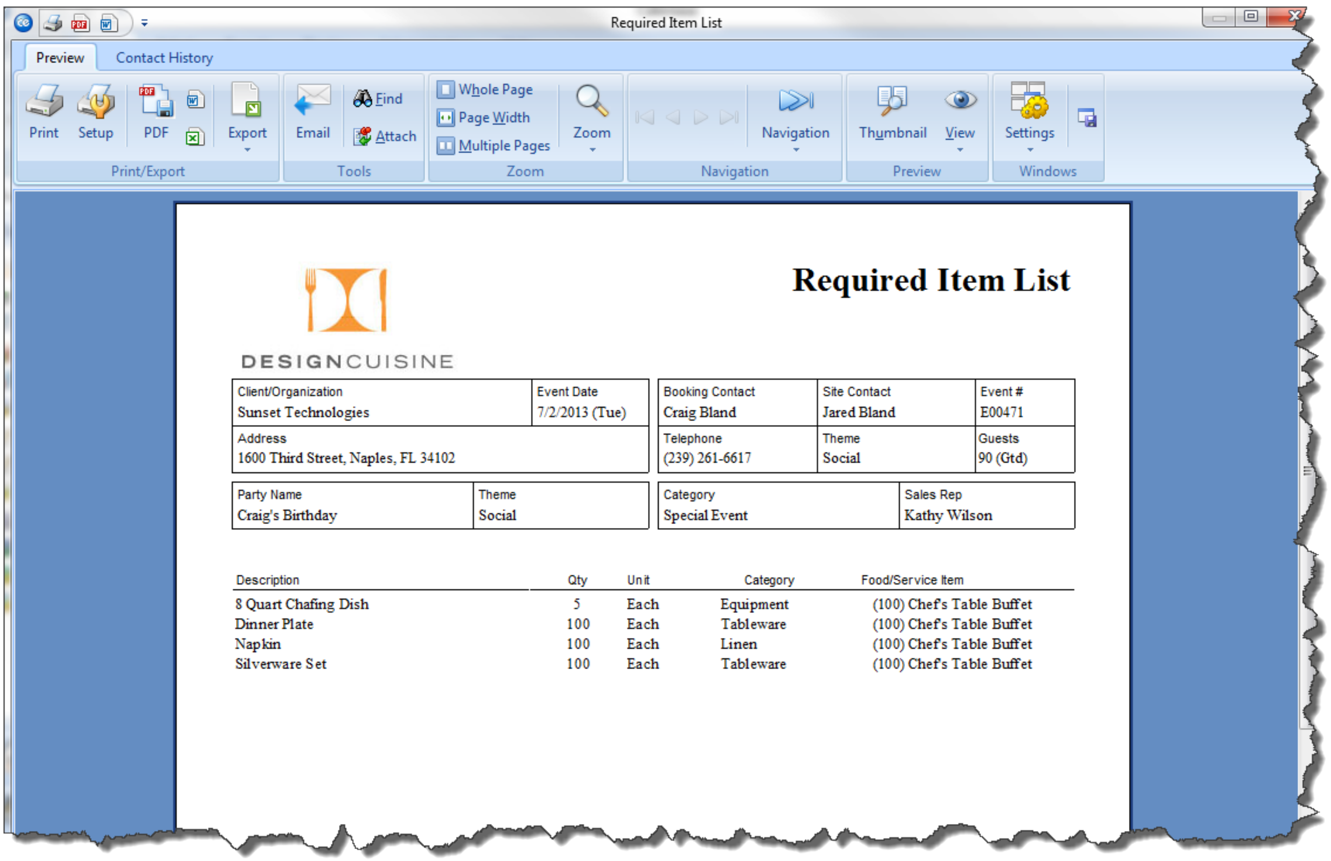
1. Access Event Manager by clicking the **Main** button on the sidebar, then clicking the **Event Manager** button.
2. Use the Search tools to find an existing event for which you want to print an ingredients list.
3. Click **Prints** at the top of the Caterease screen.
4. Select **Event Subprints** > **Ingredients > Ingredients List.**
   Note: *You also have the option of printing an ingredients list by type or by category.*
5. Click the **Print** button, located at the upper left-hand side of the window.
6. **[Optional]** Edit the print by clicking the **Edit in Word** button or the **Edit in Excel** button.
7. **[Optional]** Click the **Email** button to e-mail a copy of the print.
8. **[Optional]** Click the **Export** button to export the print.



Name	Qty	Measure	Conversion	Associated With...
Chicken breast	150	Each	(150) Each	(100) Chef's Table Buffet
Chicken Gravy	200	Liquid Oz	(1.5) Gallons	(100) Chef's Table Buffet
Cole slaw	200	Solid Oz	(12.5) Pounds	(100) Chef's Table Buffet
Mostaccioli	400	Solid Oz	(25) Pounds	(100) Chef's Table Buffet
Potato salad	200	Solid Oz	(12.5) Pounds	(100) Chef's Table Buffet
Romaine lettuce	25	Each	(25) Each	(100) Chef's Table Buffet
Sage dressing	300	Solid Oz	(18.75) Pounds	(100) Chef's Table Buffet
Vegetable du Jour	300	Solid Oz	(18.75) Pounds	(100) Chef's Table Buffet
Whipped Potato	300	Solid Oz	(18.75) Pounds	(100) Chef's Table Buffet

Generating a Required Item List

1. Access Event Manager by clicking the **Main** button on the sidebar, then clicking the **Event Manager** button.
2. Use the Search tools to find an existing event for which you want to print an ingredients list.
3. Click **Prints** at the top of the Caterease screen.
4. Select **Event Subprints** > **Ingredients > Required Item List**
   Note: *You also have the option of printing an ingredients list by type or by category.*
5. Click the **Print** button, located at the upper left-hand side of the window.
6. **[Optional]** Edit the print by clicking the **Edit in Word** button or the **Edit in Excel** button.
7. **[Optional]** Click the **Email** button to e-mail a copy of the print.
8. **[Optional]** Click the **Export** button to export the print.



Unit 6: Shifts, Staffing, and Comments

Topics covered in this unit include:

Adding Staffing to an Event
Adding Shifts to an Event
Copying Special Requests/Comments from the Scratch Pad

Adding Staffing to an Event

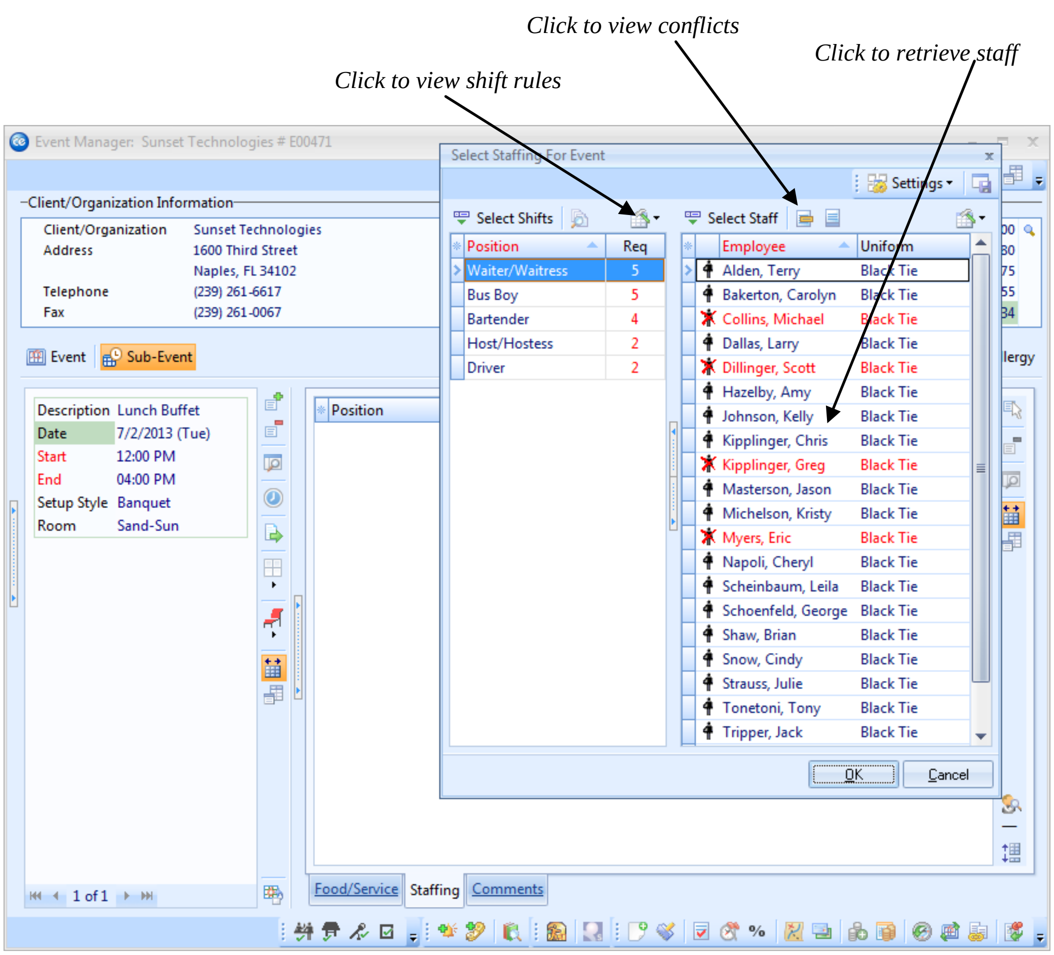
Can I add waiters, waitresses, bartenders, etc. to an event?
Absolutely, you can staff an event quickly and easily using the **Staffing** tab on the Sub-Event display of Event Manager. Caterease will even dynamically tell you which employees are available to work the event and which employees have conflicts, such as being on vacation or working another event.

Selecting Employees for an Event

1. In Event Manager, click the **Sub-Event** button located next to the **Event** button on the left-hand side of the screen.
2. Select the sub-event (if there is more than one) to which to add staffing.
3. Click the **Staffing** tab at the bottom of the screen.
4. Click the **Select Staff** button located at the upper right-hand side of the **Staffing** tab.
5. Select any available employees (drag your mouse or use your [**Ctrl**] key to select more than one at a time).
6. Click **OK**, drag and drop the selected employees onto the screen, or simply click the **Select Staff** button.

Selecting Unavailable Employees

1. Click the **Settings** button at the top right of the **Select Staffing** form.
2. Click **Staff Selection**.
3. Click **Allow Selection Of Unavailable Employees**.
4. Click on any unavailable employee, indicated by red text.
5. Optionally click the **View Staffing Conflicts** button to see why the employee is unavailable.
6. Retrieve the employee onto the **Staffing** tab, as described above.



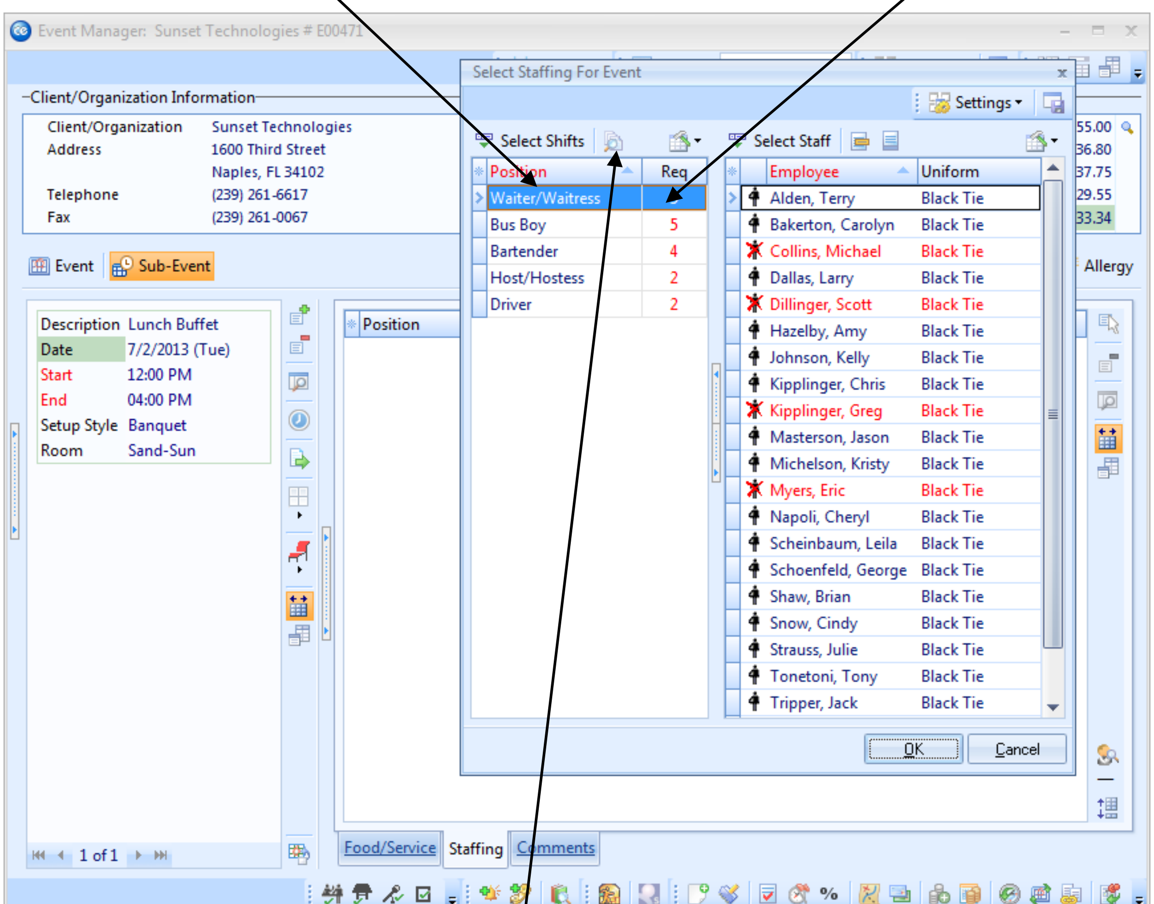
Adding Shifts to an Event

Can I keep track of how many waiters, bartenders, bus people, etc., I need to work a party?
In Caterease, you can choose to specifically identify which employees are going to work a particular event or simply determine how many shifts it will take to fully staff the event. This page discusses the latter.

Adding Shifts to an Event

1. In Event Manager, click the **Sub-Event** button.
2. Click the **Staffing** tab at the bottom of the window.
3. Click the **Select Staff** button , located on the upper right-hand side of the screen.
   Result: *The Select Staffing window opens.*
   Note: *You can optionally establish Wizard rules for each of your shifts. For example, you can tell the program that for any party with a theme of "Wedding Reception," you need one bartender for every 15 guests, etc.; therefore the program will identify which events are understaffed.*
4. Click any position ("Wait Staff," "Bartender," etc.), or optionally hold your **[Ctrl]** key down to select other positions simultaneously.
   Note: *You can also simply double-click an individual position to retrieve it.*
5. Click **OK** at the bottom of the Select Staffing window.
   Result: *The selected positions (shifts) are retrieved into the event.*
   Note: *You may want to display other shift details (Required, Price, Total, Hours, etc.), on the grid located on the **Staffing** tab, or on the Select Staffing window itself. Click the **Quick Column Customizing** button*  *at the top left of either grid to choose columns to display.*

Select the desired shift(s) *Required staff totals are based on the shift rule*



Click to view shift rule

Copying Event Comments from the Scratch Pad

What are event comments?

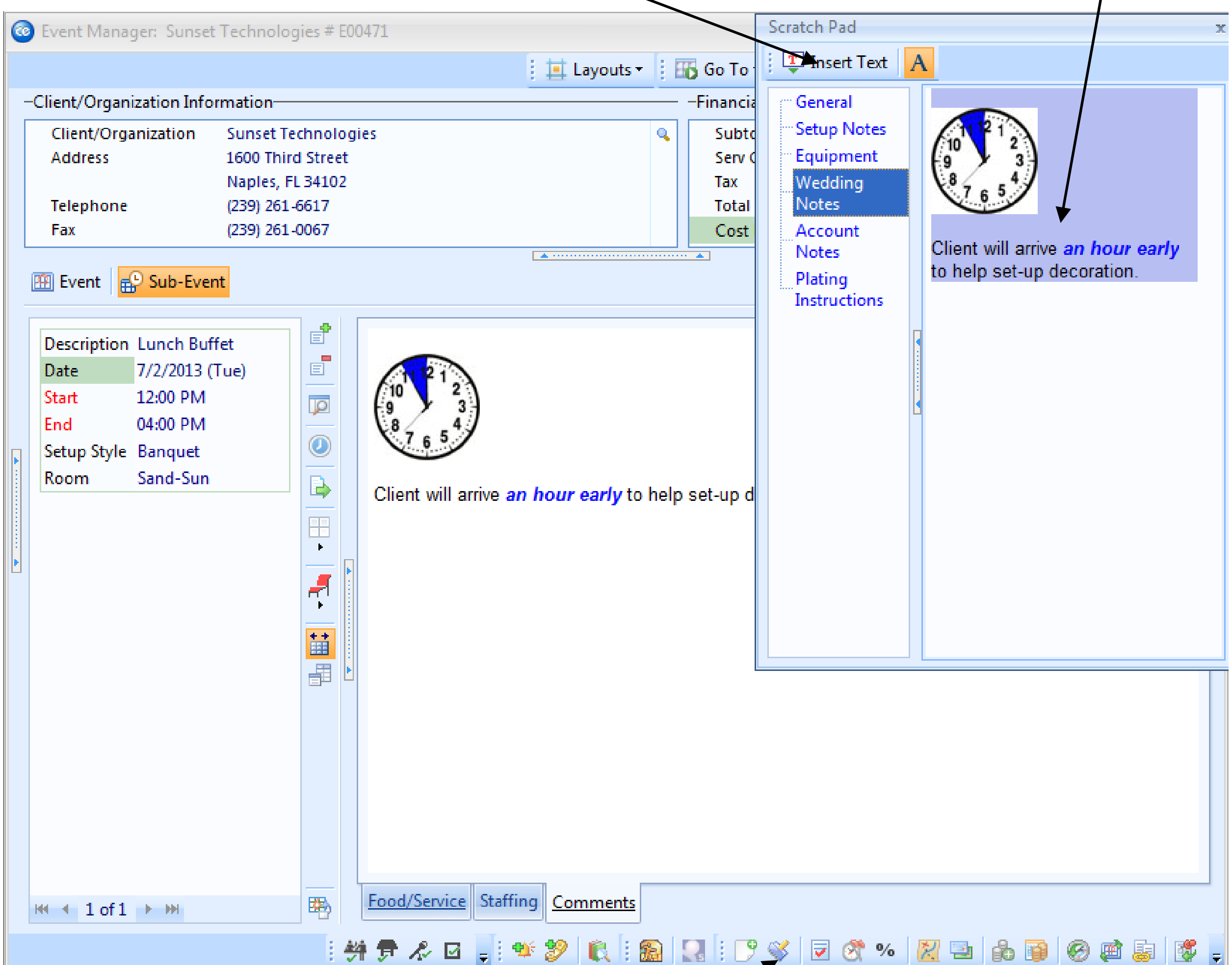
The **Comments** tab in the Sub-Event section of Event Manager is a place for you to enter the general special requests or notes concerning sub-events. These comments will print on your Contract and BEO, but can be suppressed, if desired.

Copying from Scratch Pad

1. Click the **Comments** tab at the bottom of the screen.
2. Click into the large white Comments text block.
3. Click the **Scratch Pad** button , located at the bottom of the Event Manager screen.
4. Highlight the text you want to copy and press the **Insert Text** button.
5. Format the text by highlighting it and using the **Format** toolbar at the top of the screen or by highlighting the text, right-clicking, and selecting **Font**.

*Click on the **Insert Text** button to insert the highlighted text*

Highlight desired text



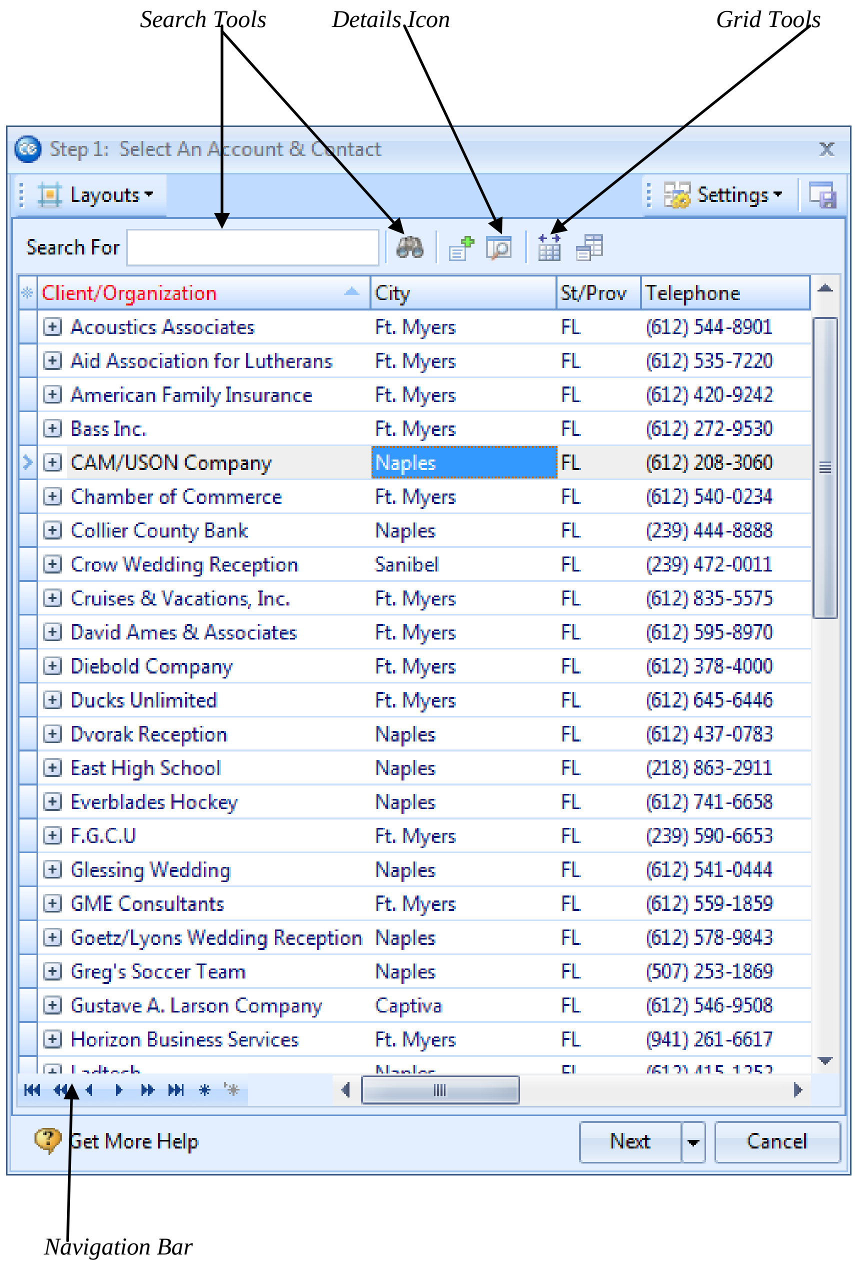
*Click the **Scratch Pad** button to access commonly used text*

Unit 7: Booking a New Event Using the Event Wizard

Topics covered in this unit include:

Selecting a Customer for the Event
Using the Incremental Search Tool
Using Common Data-Entry Tools
Entering Banquet Room Details
Using the Room Selection Wizard
Retrieving Menu Items
Saving the Event

Booking a New Event Using the Event Wizard



The Event Wizard Screen

Now that we've discussed adding events in detail, let's explore a quick and easy alternative: the Event Wizard. This option lets you add a new event in three easy steps: selecting an account (and optional contact person), entering basic details, and retrieving menu items.

You can access the Event Wizard from within your Event Manager screen, or you may click the **Event Wizard** button on the **Tools** sidebar on your Main screen. (*If you have the Professional or Standard version of Caterease, you can even add a new event from the Event Scheduler. See the Event Scheduler section for more information.)*

Step One: Selecting an Account

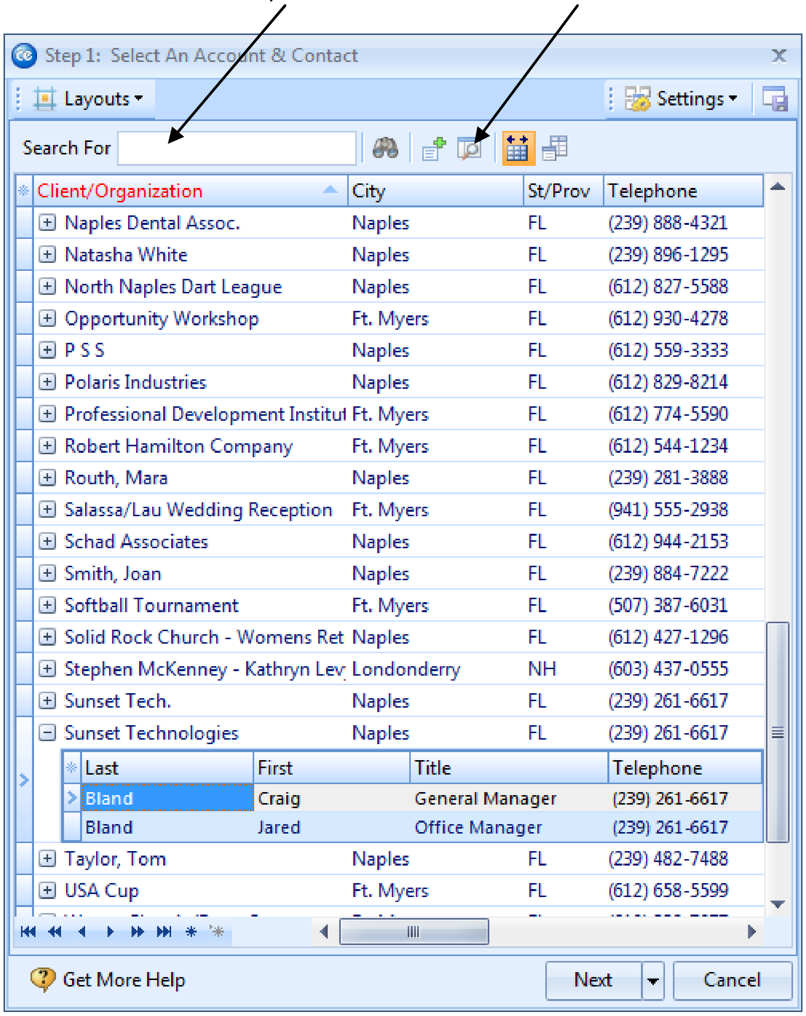
Selecting an account

This first step allows you to select an account for your new event, as well as select a booking and/or site contact person. You can either choose an account that already exists in your database or add a new one.

Selecting Accounts

1. Click the **Tools** sidebar group on the left-hand side of your Main screen.
2. Click the **Event Wizard** button.
3. Either select an account for your new event or add a new account.
4. Click the plus sign button to the left of your selected account to access a drop-down list of contact people.
   Note: *If no list appears, no contact people have been added for this account. You can add a contact person here by clicking the* ***Show Details*** *button at the top of the Select Account window, then clicking the* ***Account Locked*** *button at the bottom left and confirming you would like to unlock the account.*
5. Optionally select a contact person's name to default as the Booking Contact and/or Site Contact of your new event.
   Note: *In order for the name to default, you must have enabled this feature in New Booking Defaults. See the Setup section for more information.*
6. Click **Next**. (***Note:*** *You may click the drop-down list to the right of the* ***Next*** *button to select any custom layouts.)*

Type a name into the Incremental Search field *Details button*



Step Two: Entering Basic Details

Filling in Event Fields

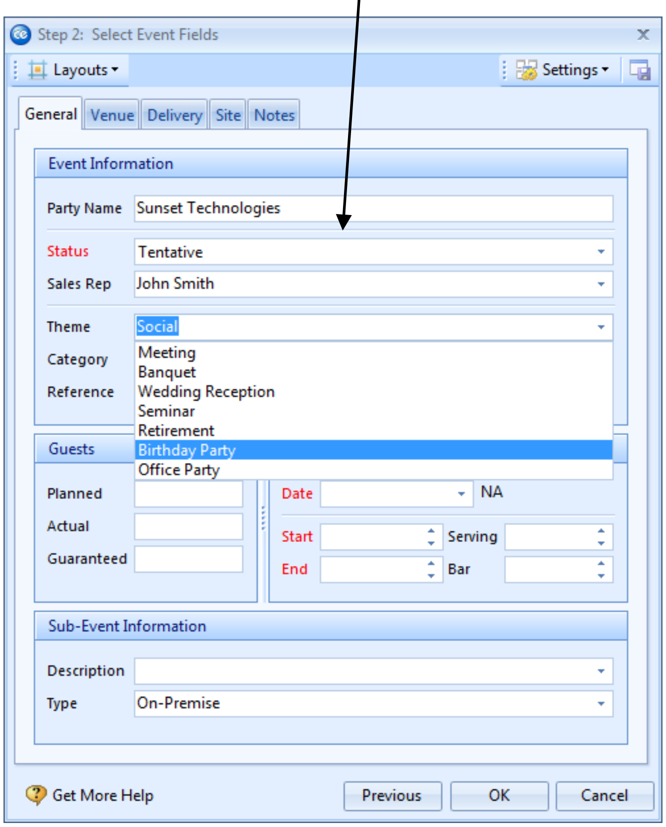
This window lets you quickly fill some general details about your new event. Some of this information may default based on your program's New Booking Defaults. You can type over it here, or click down arrows in various fields to access quick-pick lists.

Entering Details

1. Optionally enter <u>Party Name</u>, <u>Sales Representative</u>, and other details in the Event Information section, either by typing directly into the fields or clicking the corresponding down arrows to access quick-pick lists.
   Note: *These quick-pick lists are yours to create and control. See the section on Setup for more information. As an alternative to clicking the down arrow, try typing into your <u>Sales Rep</u> or other quick-pick field. The quick-pick list will automatically scroll to match what you type.*
2. Optionally enter a guest count for your new event.
   Note: *Your <u>Guaranteed</u> guest count might default to a certain percent of your <u>Planned</u> number; this is a setting you can control on the **Managers** tab of your program's Global Settings.*
3. Enter a date and start/end times for your new event, either by typing directly into the fields or using the drop-down calendar (date) or up and down arrows (times).
4. Optionally enter a <u>Description</u>, <u>Type</u>, <u>Setup Style</u> and <u>Room</u> for your new event either by either by typing directly into the fields or clicking corresponding down arrows to access quick-pick lists.
5. When finished, click **OK**.
6. Click **Yes** at the prompt to retrieve menu items for your new event, or click **No** to simply edit the new event by hand.

Tip: This new event has not yet been saved. You will be prompted to save when you exit Event Manager, or you can simply click the **Save Changes** button at the top of the screen in the Event Manager.

Some information may default from your New Booking Defaults

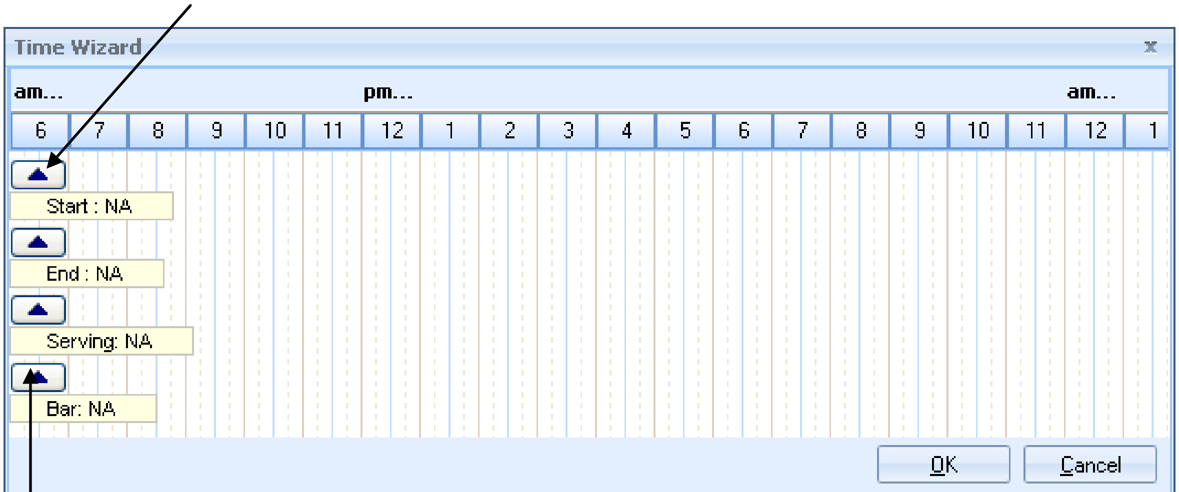


Time Wizard

What is a time wizard?
The Time Wizard is a shortcut way to enter times for a sub-event using your mouse rather than the number keys on your keyboard.

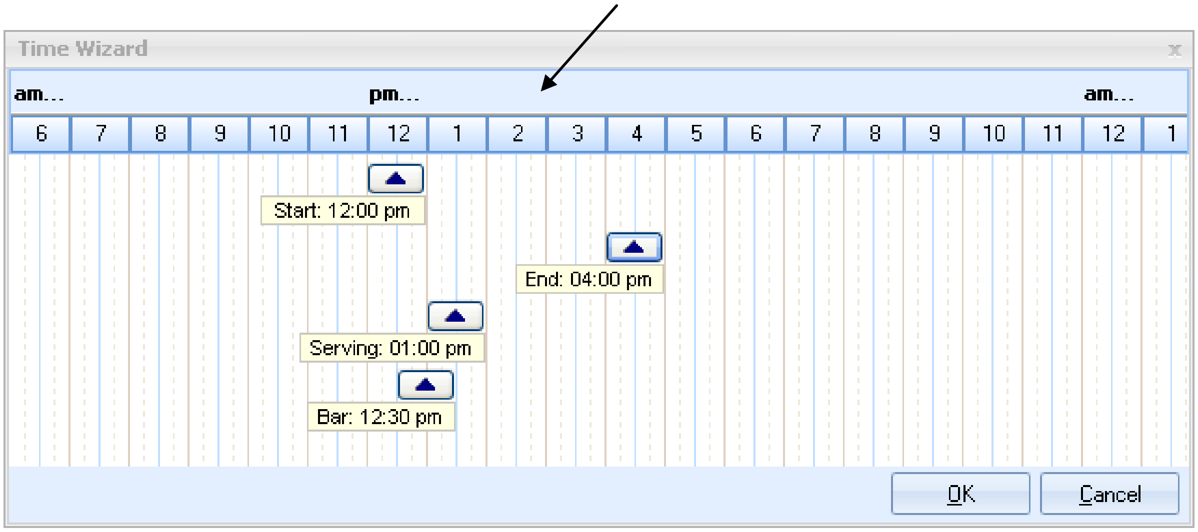
1. On Step 2 of the Event Wizard, click the **Time Wizard** button .
2. Click one of the the time-setting bars, hold your left mouse button down, and drag to the left or right.
3. Release the mouse button when the time is set as you want it.
4. Remove a time by clicking the time-setting bar with your right mouse button.
5. Click **OK** when finished.
   Note: *To remove one of the times, click on it with your right mouse button, or simply highlight the text on the* ***General*** *tab of Event Manager and press your* ***[Delete]*** *key*.

Drag-and-drop time bars



Right-click to remove time

Sample



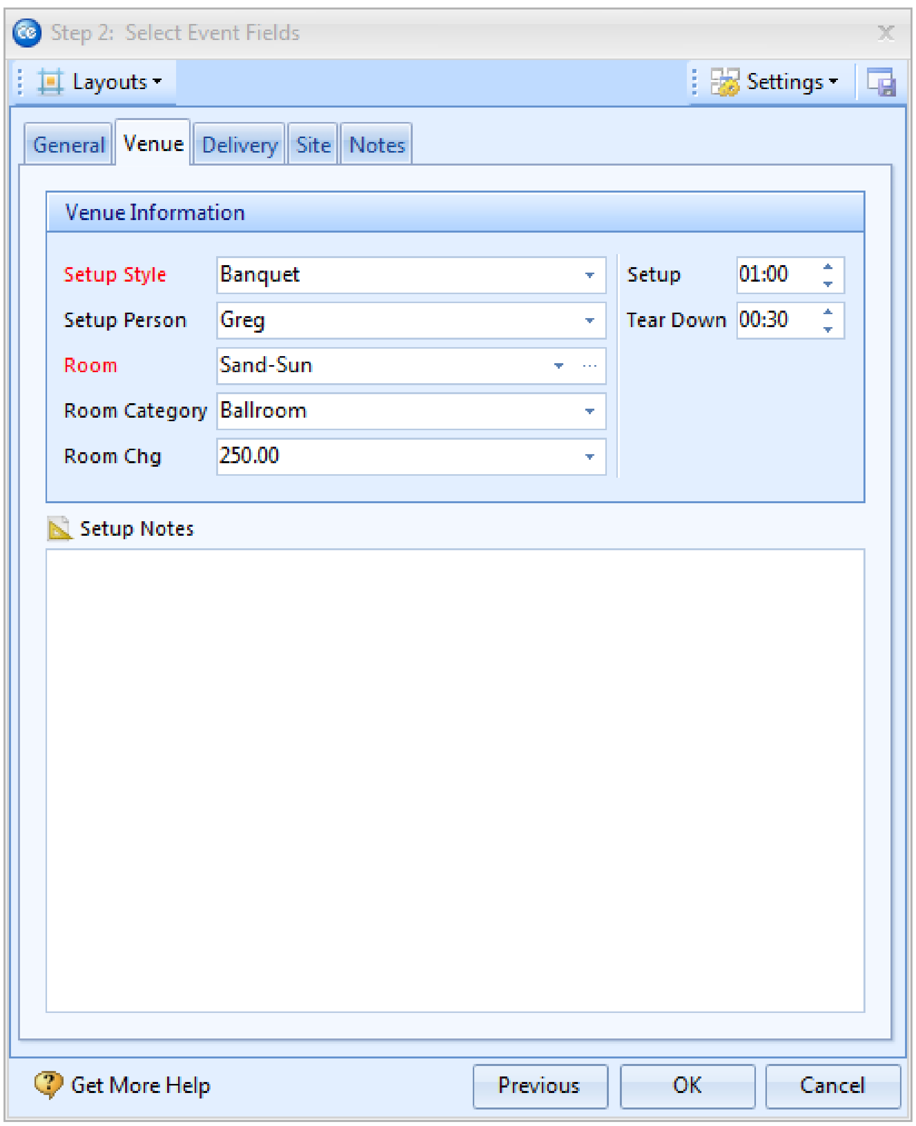
Entering Room Details

What is meant by "on premise" versus "off premise"?

You would consider an event "on-premise" if it were being held on your property - for example, in a banquet room. An event is "off-premise" if you are delivering food and supplies to another location. Entering room information for on-premise events allows Caterease to block that room space and check for any conflicts. Entering site location information is helpful for those events that are off-premise. Both sets of information can be entered in the Event Wizard.

Adding Banquet Rooms

1. From the **Venue** tab, click into the Setup Style field.
2. Click the down arrow to the right of the Setup Style field and select a setup style from the corresponding quick-pick list.
3. Click into the Room field.
4. Click the down arrow located at the right of the Room field and select a room from the corresponding quick-pick list. ***Note:*** *The number next to each room name indicates the maximum capacity of guests in that room for the selected setup style. "NA" indicates that the selected setup style is not recognized for that room.*



Room Selection Wizard

Can't the program just pick a room for me?

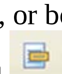
Well, that would be magic, wouldn't it? Try the Room Selection Wizard. This powerful tool will consider the date, time, setup style, and guest count of the party you are booking and will automatically choose the best matching room for that criteria. It will even show all other rooms as well as their availability.

Accessing the Room Selection Wizard

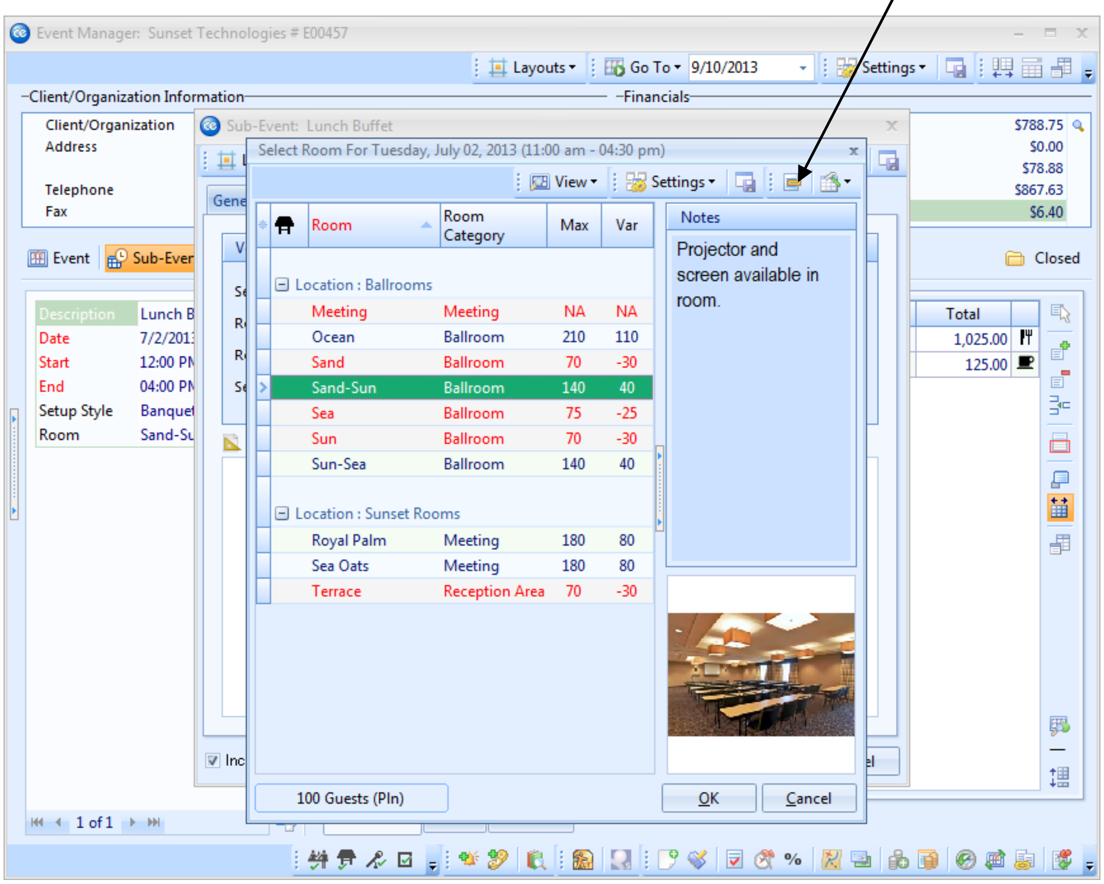
1. In Event Wizard, be sure to fill out date, guest count, time, and setup style information.
2. Click the **Room Selection Wizard** button (ellipse). The best matching room for your sub-event will be highlighted in green.

Using the Wizard

Below are some suggestions for using the Room Selection Wizard:

- Click **OK** to accept the selected room, or simply double-click the room name.
- Select another room, setup style, or both, if desired, and click **OK**.
- Click the **View Conflicts** button  to see reasons certain rooms are unavailable (highlighted in red).
- Click the **View** menu to optionally display room notes and picture or associated breakout rooms and setup styles.
- Click the **Settings** button for other options for the Wizard, such as allowing the selection of unavailable rooms, automatically showing the recommended room, or showing grid lines.
- Click **Settings > Conflict Settings** to optionally have the Wizard track booking conflicts or capacity conflicts.
- Click the **Quick Column Customizing** button to add other columns of information to the Wizard display, including room charge, default diagram, location, etc.

Click to view room conflicts



Step Three: Retrieving Menu Items

Retrieving menu items

Menu items can be retrieved into an event from your pre-existing menus or unique items can be added to an event by hand. Step 3 in the Event Wizard opens your new event in the Event Manager and automatically opens the Select Menu Items window for you to retrieve items.

Retrieving items

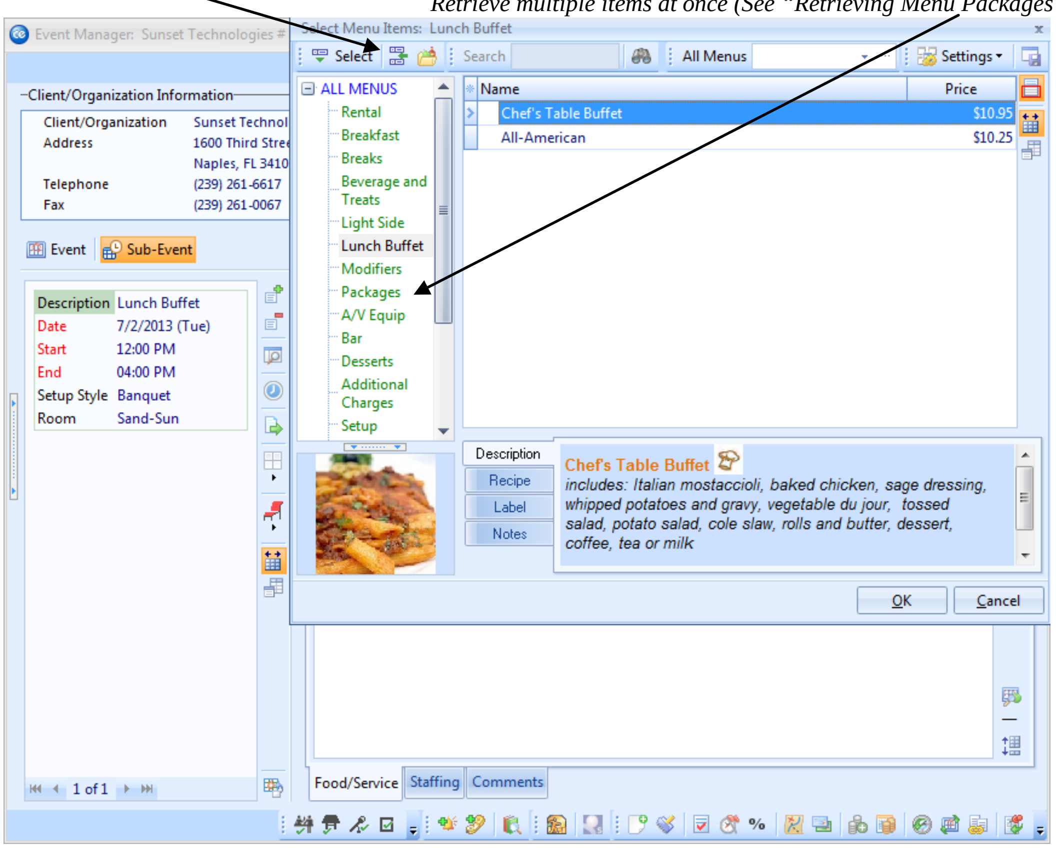
1. Select a menu title on the left-hand side of the **Select Menu Items** window.
2. Select a single menu item or multiple items using the following guidelines:
   - Click an item to select it.
   - Hold your left mouse button down and drag your cursor over multiple items.
   - Click one item, hold the **[Ctrl]** button down on your keyboard and click other items.
3. Drop items from your menus onto your **Food/Service** tab using the following guidelines:
   - Double-click a single item in the Select Menu Items window.
   - Hold your mouse button down on one individual item (without moving) for a half-second and drag that item from the Select Menu Items window onto your **Food/Service** tab.
   - Hold your left mouse button down on a group of selected items and drag and drop them onto the **Food/Service** tab.
   - Click the **Select Items** button.
   - Click **OK**.

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

4. Click in the Qty column on the **Food/Service** tab and enter a quantity for each menu item.

*Click **Insert Mode** button to place items above other items*

Retrieve multiple items at once (See "Retrieving Menu Packages")



Saving the Event

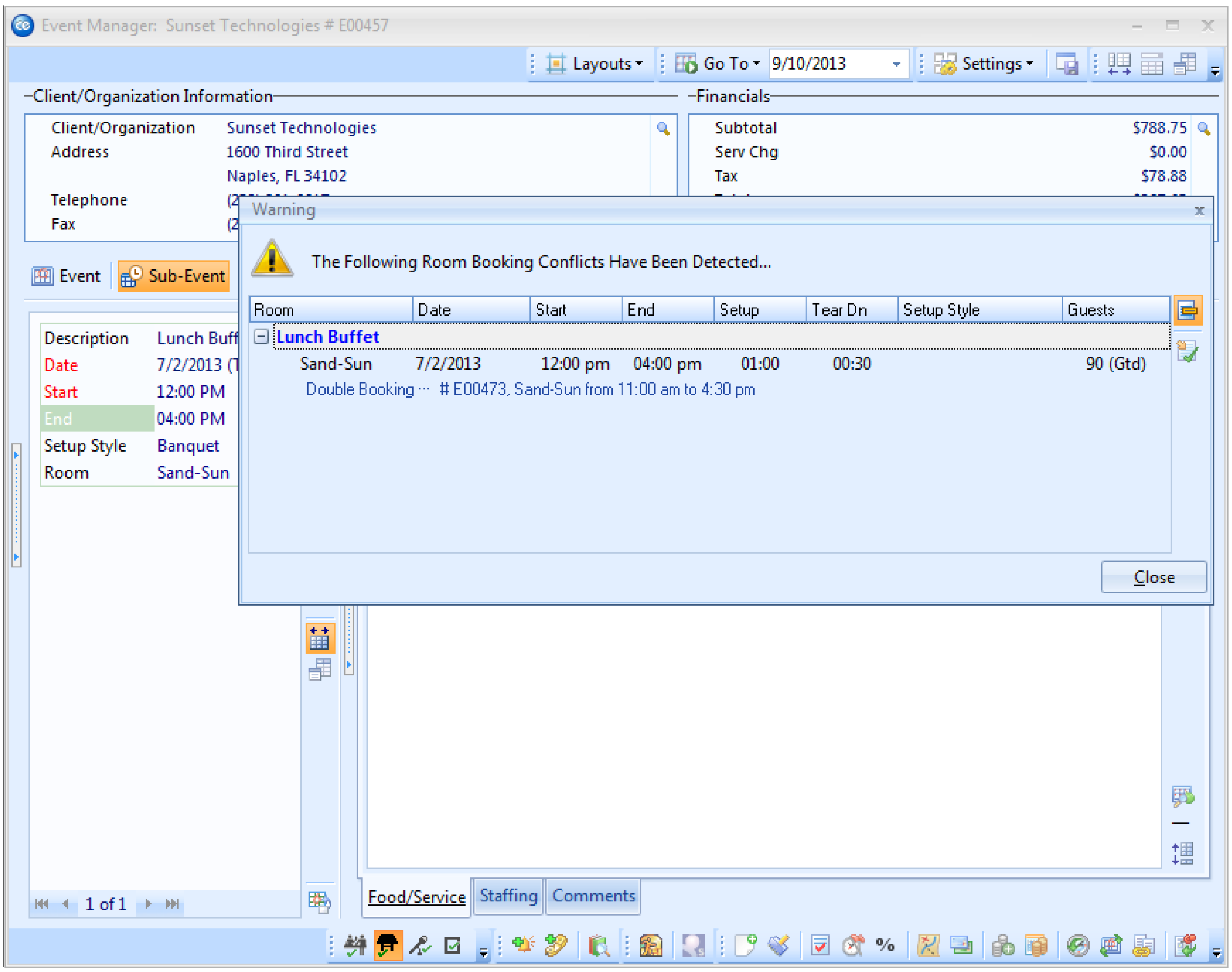
What happens if I forget to save an event?

Relax – you can't forget. If you close your Event Manager or even your entire Caterease program, you will be asked if you want to save your changes. If you navigate away from an order (by searching for a different order or using your navigation buttons to scroll to a different order), it is an implied Save; your changes are saved automatically.

Saving Changes

1. Click the **Save Changes** button at the top of the Caterease screen.
2. Click **OK *after carefully reviewing any prompt*** that might appear; or click **Cancel**, make corrections to the order, and repeat Step 1.

*If you are prompted as to a conflict (staffing or room), be sure to review the exact details of the problem by clicking the **View Conflict** button* .



Unit 8: Booking a New Event from the Scheduler

Topics covered in this unit include:

Changing the Sub-Event Calendar Grouping
Modifying Event Information from the Calendar
Accessing the Event Wizard from Sub-Event Calendar

Viewing the Sub-Events Scheduler

Can the Event Scheduler show detailed venue information?
Sure it can. With just a couple of mouse clicks, you can turn your Scheduler into a bar graph, showing which events are held in which locations at what times. You can even drag and drop events from one venue to another, one time to another, even one date to another. Since these details are specifically sub-event details, the first thing you must do is access the Sub-Event calendar.

Displaying Sub-Events

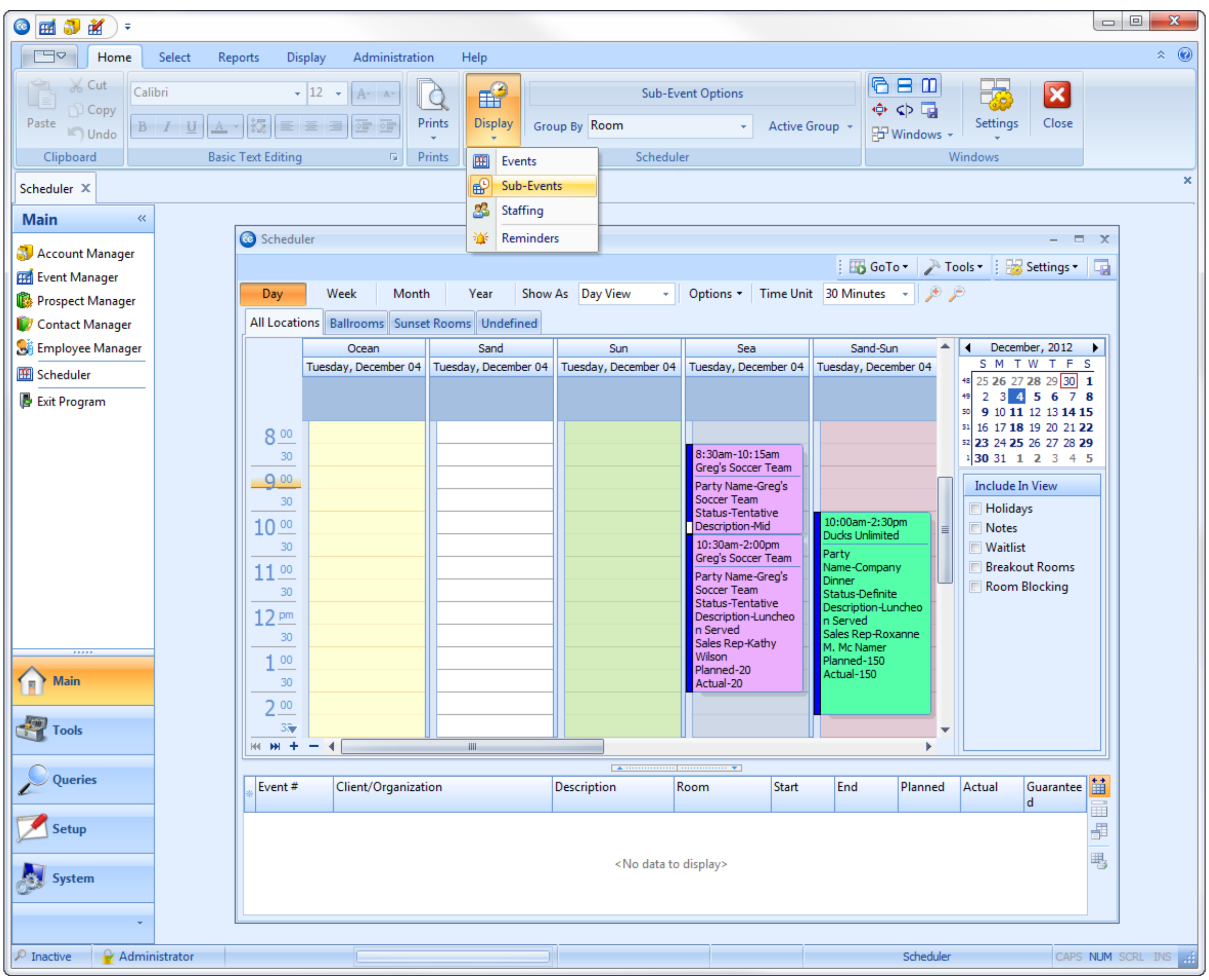
1. Click the **Scheduler** button on the **Main** sidebar group to open the Scheduler.
2. On the **Home** ribbon at the top of the screen, click **Display** > **Sub-Events**.

Grouping by Venue or Other Detail

1. In the Sub-events calendar, click the down arrow in **Group By**, at the top of the ribbon.
2. Choose <u>Room</u>, <u>Site Name,</u> or other detail.

Displaying Groups in Bar Graph Format

1. Group your sub-events calendar as described above.
2. Click the **Day** button.
   Note: *You can see more or fewer groups (or bars in the graph) by clicking the plus or minus sign in the navigation bar at the bottom left of the graph.*



Modifying Event Information

What type of event information can be modified in the Scheduler?

There are several details about an event that you can modify from the Scheduler screen. Most impressively, in the Sub-Events calendar you can drag and drop event "bars" (those color-coded bars that indicate when and where an event is being held) from any group to another, meaning you can move them from one sales rep to another, one venue to another, one time to another, one day to another, and more! You can also stretch and shrink those bars, thereby changing the corresponding event's start and end times.

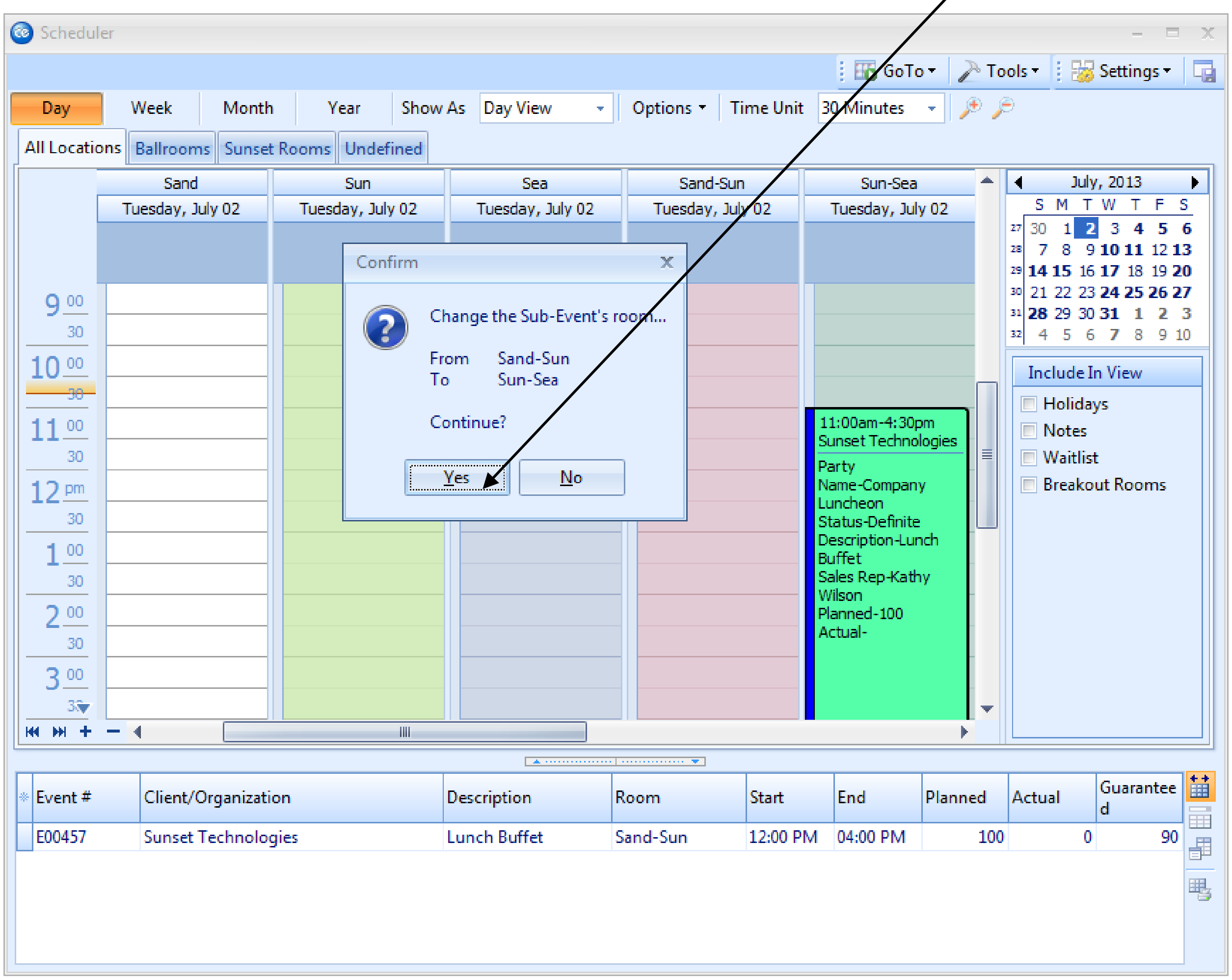
Dragging Events from Group to Group

1. Group sub-events in the Scheduler by any detail, as discussed on the previous page.
2. Hold your left mouse button down over any event bar on the Scheduler screen.
3. Drag the bar to another group and then release it.

Stretching and Shrinking Bars

1. Display events in a bar graph format, as described on the previous pages.
2. Float your mouse pointer (without clicking) over the top or bottom of any event bar on the Scheduler screen until it becomes a double-headed arrow.
3. Hold your left mouse button down and drag the edge of the bar upward or downward.
4. Release your mouse button. This highlights a period of time. Right-click to then add an event there.

Click and drag/drop events to a new room; Confirm



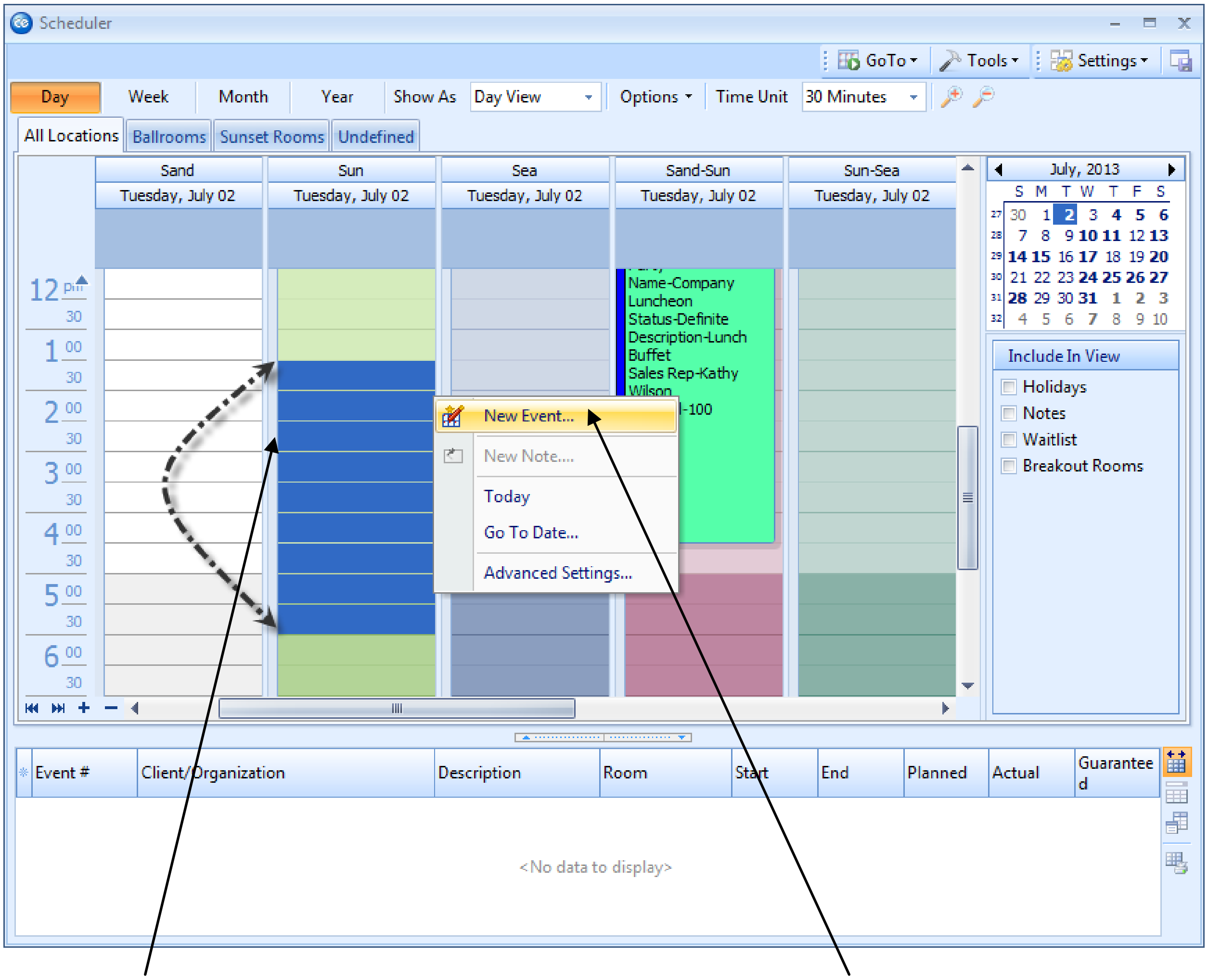
Accessing Event Wizard from the Sub-Event Calendar (Seeimage on following page.)

I can do this right from here?
Yes, you can - if you have the Professional or Standard version of Caterease! Right from this Scheduler screen, you can add an event, including client information, room, times (Start, End, Setup, Tear Down), plus a host of other event and sub-event details. Then, when you're done, you can choose to open this event in Event Manager and edit it further (perhaps adding menu items, etc.), or you can remain in the Scheduler to review other dates or perhaps add more events.

1. Group your Sub-events calendar, as described on the previous page, and click the **Day** 

or **Week** view button 

.
   Note: *Steps 1-4 are designed to optimize the event booking process. You can simply skip to Step 5, below, and fill in event date, times, and other information by hand.*
2. Find a specific time and date that you would like to hold your new event.
3. In the appropriate group for your new event, hold your left mouse button down on the Scheduler screen at the time you want your new event to start.
4. Drag your left mouse button down until you reach your desired end time and then release your mouse button.
5. Click your right mouse button and select **Add a New Event**.
6. Select an account for your new event, or add a new account.
7. **[Optional]** Click the plus sign button to the left of your selected account and select a contact person's name to default as the Booking and/or Site Contact of your new event.
8. Click **Next**.
9. Enter Party Name, Sales Representative, and other details as desired in the Event Information section, either by typing directly into the fields or clicking corresponding down arrows to access quick-pick lists.
10. **[Optional]** Enter a guest count for your new event.
11. **[Optional]** Adjust the Setup and Tear Down times for the event.
12. **[Optional]** Enter a Description, Type, and Setup Style for your new event either by either by typing directly into the fields or clicking corresponding down arrows to access quick-pick lists.
13. When finished, click **OK**.
    Result: *Your new event is saved, and a prompt appears, asking if you would like to open it in Event Manager*.
14. Click **Yes** to continue editing your new event in Event Manager (adding menu items, etc.), or **No** to remain in the Scheduler.



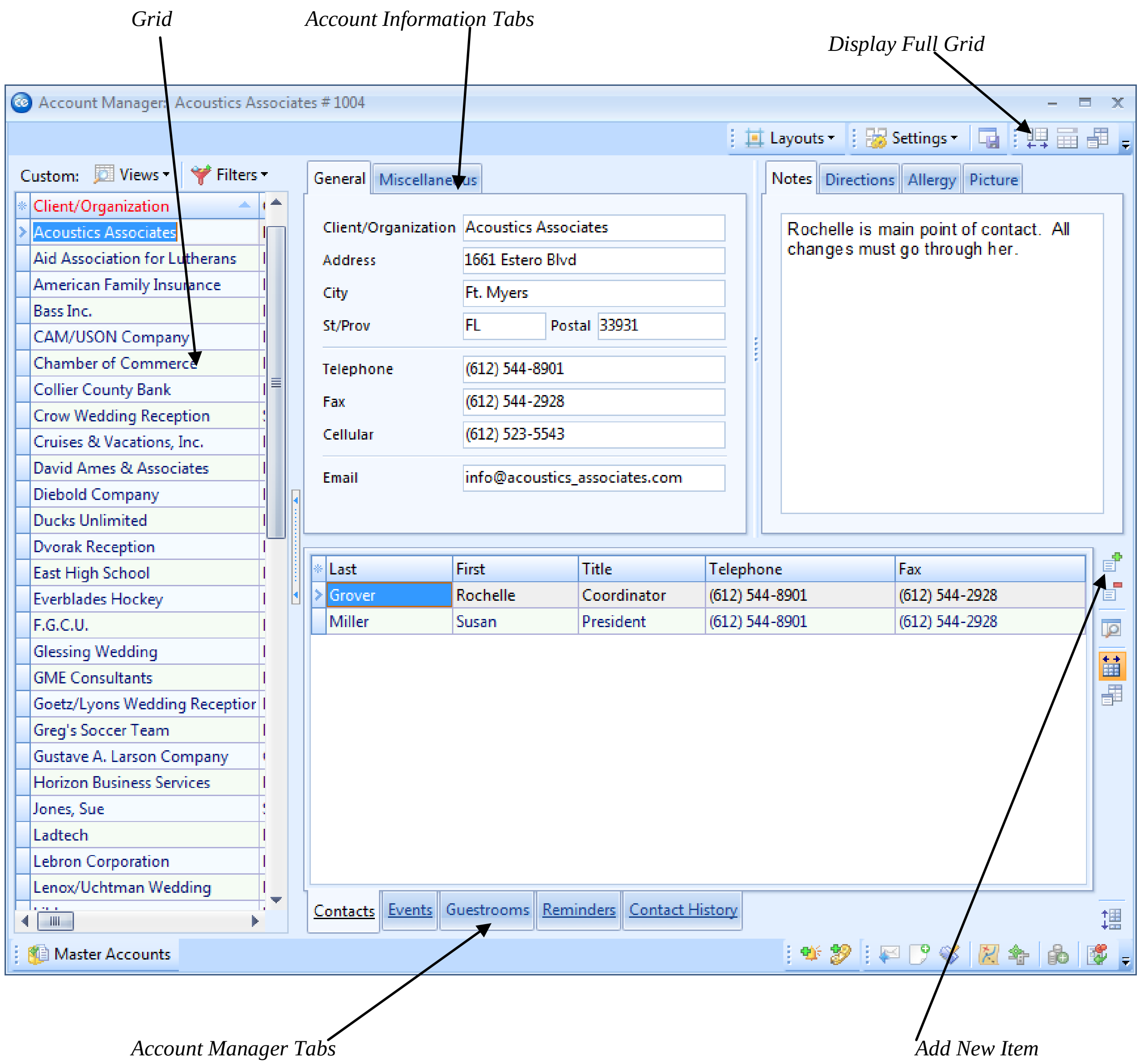
Click and drag through desired times *Right-click to add a new event*

Unit 9: Booking a New Event from Account Manager

Topics covered in this unit include:

Introducing the Account Manager Display
Finding a Specific Account
Adding a New Event from the Events Tab

ACCOUNT MANAGER



Account Manager Screen

The Account Manager shows you all information pertinent to any account in your database. From Account Manager, you can see a list of all Contact names, Events, Reminders, and History notes associated with a particular account.

You can easily edit any of this information by selecting an item and clicking the **View** button. Open an event in order to make changes, edit the text of a history note, even respond to a reminder quickly and easily!

As with other Managers in Caterease, the Account Manager makes use of the main toolbars across the top of your screen. These are the buttons you would use to add a new account, delete the current account, navigate from account to account, etc.

Adding Events from Account Manager

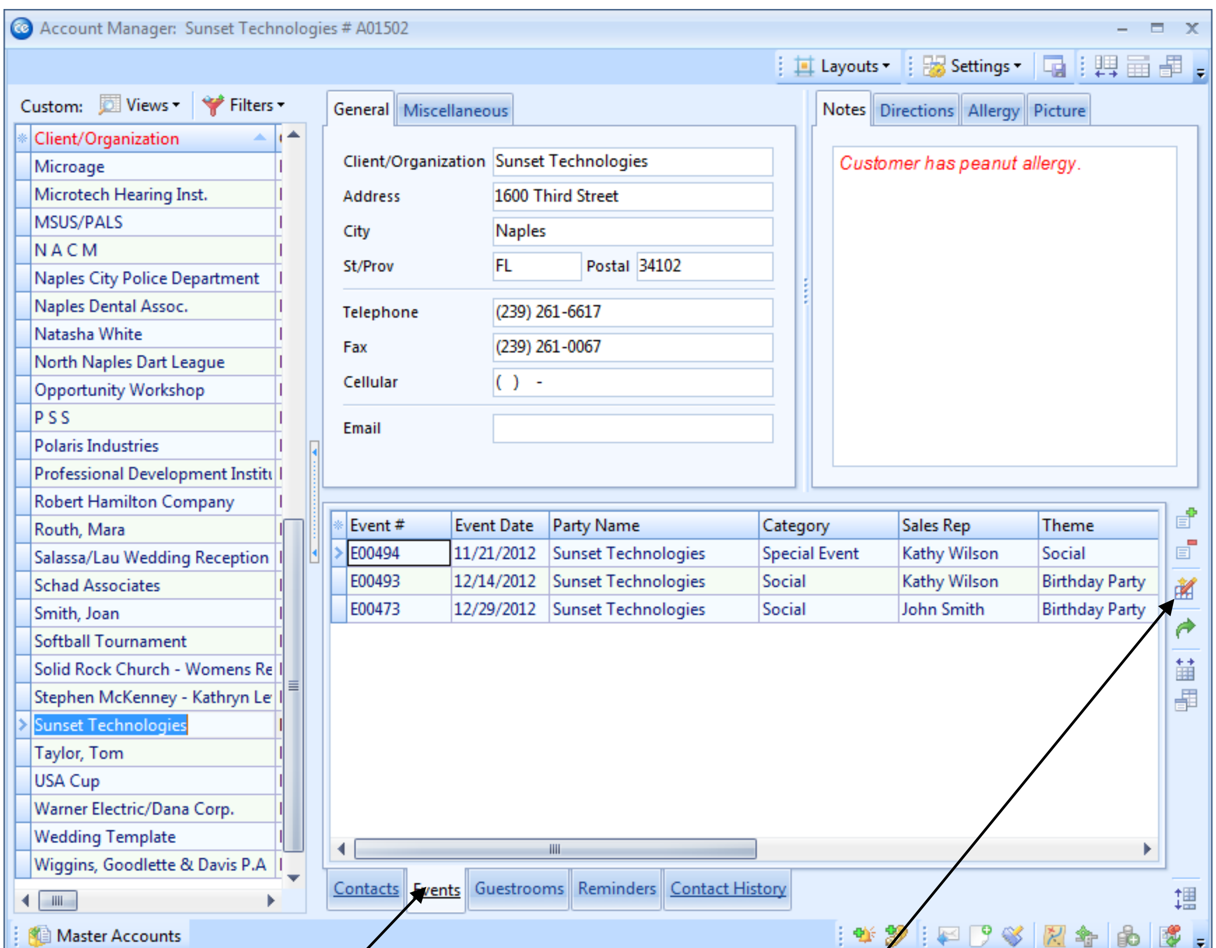
I thought I had to add events through Event Manager?

As you may already know, adding events to Caterease needs to be done in Event Manager. Yet here we are, discussing the option of adding events from Account Manager. Caterease is designed, intentionally, to give you the ability to zigzag all over the place - to go where you want to go in the program whenever you want to go there. Therefore, if you ever find yourself looking at account information in Account Manager, and have the thought that you need to add an event for that customer, one mouse click will take you right into Event Manager and place you on a brand-new event with all of that customer's information.

Adding an Event

1. Click the **Events** tab in the bottom window of Account Manager (if it is not already selected).
2. Click the **Add New Event** button, located on the lower right-hand side of the Account Manager screen. ***Note****: This button is identical to the* ***Add New Record*** *button at the top of the Caterease screen, which is used to add new accounts. Don't confuse them.*
3. Click **Yes** to confirm your choice. You will be taken into Event Manager and placed on a brand-new event for that customer. Enter event information as described in the previous chapter.

Tip: You also have access to the Event Wizard from the Account Manager **Events** tab. (*See the Event Wizard section for more information on how to use this tool.)*



Be sure to select the ***Events*** *tab*

Optionally click the ***Event Wizard*** *button*

SECTION 2: Accounts (Customers)

Unit 10: Adding a New Account in Account Manager

Topics covered in this unit include:

Adding a New Account
Filling Out the Miscellaneous Tab
Adding Contacts to an Account

Adding a New Account

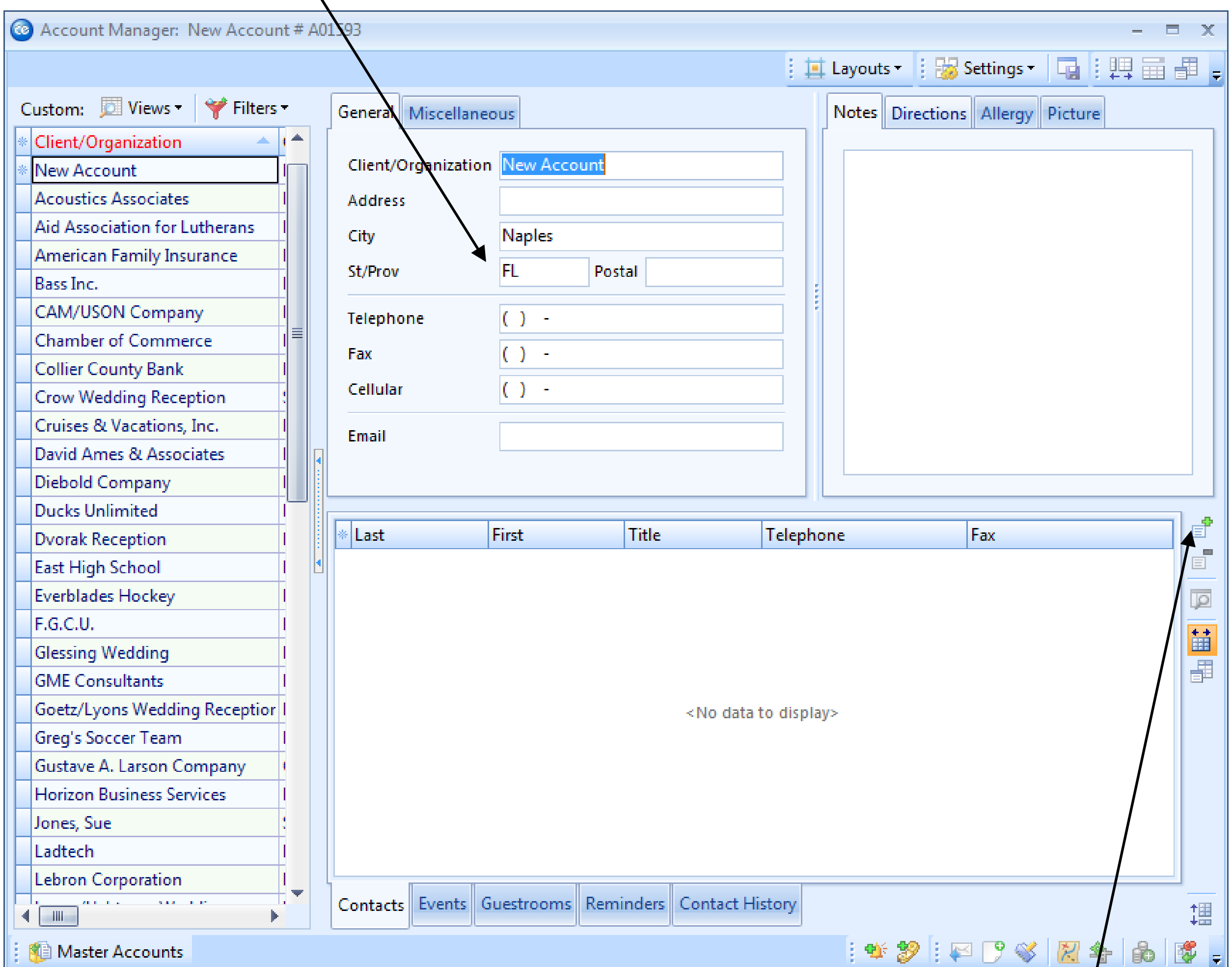
Haven't I already learned to add an account?

We have already discussed adding an account as you book a new event. But what if you want to enter account information for no other reason than to have it on file for the future? This is where Account Manager comes in.

Adding an Account

1. Access the Account Manager by clicking the **Account Manager** button on the sidebar.
2. Click the **Add New Record** button , located in the main toolbar at the top of your Caterease screen.
3. Click **Yes** to confirm your choice.
4. Type the name of your new account and press your **[Enter]** key to move to the next field.
5. Continue to fill out the fields as desired, pressing **[Enter]** or [**Tab**] after each one to move to the next field.

Enter account information



Add contact people

Filling Out the Miscellaneous Tab

What is the Miscellaneous tab all about?
When you are adding a new account to the program, the **Miscellaneou**s tab allows you to enter some important details you can use to track the account. The fields on this tab are mostly "quick-pick" fields, meaning you can choose data from drop-down lists that are under your control. All of the details on this tab reflect the account you are in the process of adding.

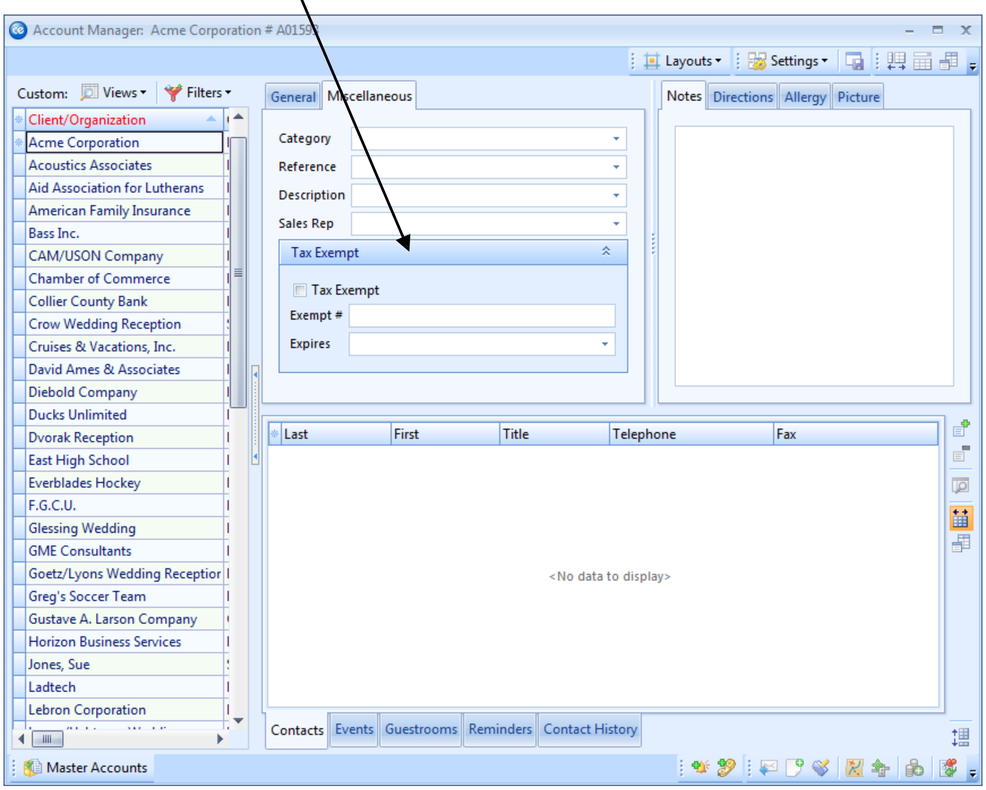
Filling out the Miscellaneous Tab

1. While adding an account, click the **Miscellaneous** tab.
2. Click the down arrow at the right of any field and choose from the corresponding quick-pick list (you can customize these lists).
3. Click the checkbox next to **Tax Exempt** if events for this account should default to tax exempt. ***Note:*** *Click the checkbox to the left of **Tax Exempt** if you want to enter a tax exempt number for the account.*
4. **[Optional]** Enter an expiration date of the tax exemption, or access the drop-down calendar to select a date.

Adding or Removing a Field (See Unit 13 for more information)

1. Click your right mouse button anywhere on the **Miscellaneous** tab.
2. Select **Customize.**
3. Hold your left mouse button down on the name of any tab or field.
4. Drag that field name into the Available Items window to remove a field from the screen; drag an item from the Available Items pane onto your screen to add a field.
5. Repeat as desired.
6. Click **Close** when finished. (Remember to click the **Save Current Window Settings** button  if you wish to set this as your new default arrangement.)

*Right-click and choose **Customize** to remove fields or add fields*



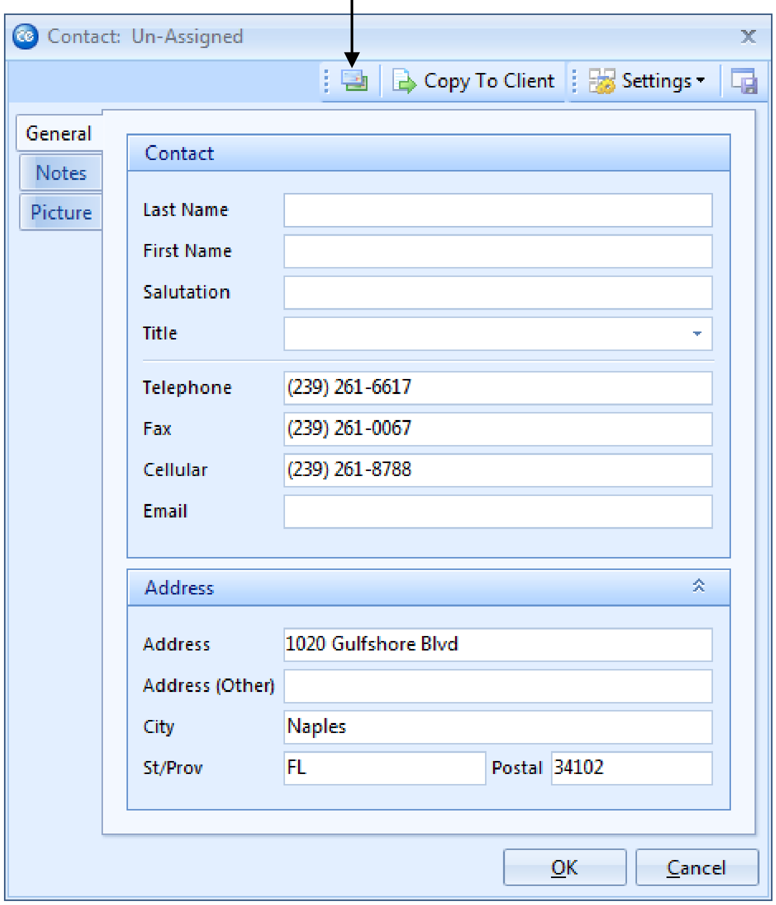
Adding Contacts to an Account

Shouldn't I add contact people in Account Manager?
Contact people, like accounts, can be added in Event Manager as well as in Account Manager. Here we address adding contact people as you enter in a new event.

Adding a Contact Person

1. Click the **Add A New Contact** button, located at the lower right of the Select Account form. ***Note:*** *This button is identical to the* ***Add New Account*** *button at the top of the form. Be careful not to confuse them.*
2. In the form that pops up, type the last name of the new contact person.
3. Press your **[Enter]** or **[Tab]** key to move to the next field.
4. Continue to fill out contact information as desired, pressing your **[Enter]** or **[Tab]** key to move from field to field.
5. In quick-pick fields such as Title, click the down arrow at the right of the field and pick an option from the corresponding list.
6. **[Optional]**Click the **Credit Card Information** button , select a credit card from the quick-pick list, and type in the remaining credit card information.
7. **[Optional]**Click on the **Notes** tab and type any notes pertinent to this particular contact person. These notes do not print anywhere; they are merely here for your reference. You can format the text you enter into this Notes text block by clicking your right mouse button and choosing **Font**.
8. **[Optional]** Click on the **Picture** tab, click your right mouse button, and select **Load From File** if you want to include a digital image of this contact person.
9. When finished, click the **OK** button at the bottom of the form to close the form and save your changes.

Click to enter default credit card information



Unit 11: Adding an Account in Event Wizard

Topics covered in this unit include:

Entering General and Miscellaneous Details
Adding a Contact Person

Adding an Account in Event Wizard

What if the client I want isn't on the list?

You can add a new client while in the process of booking an event in Event Wizard. The process you use and the details you enter are very similar to those in Account Manager – and will be available throughout the entire program.

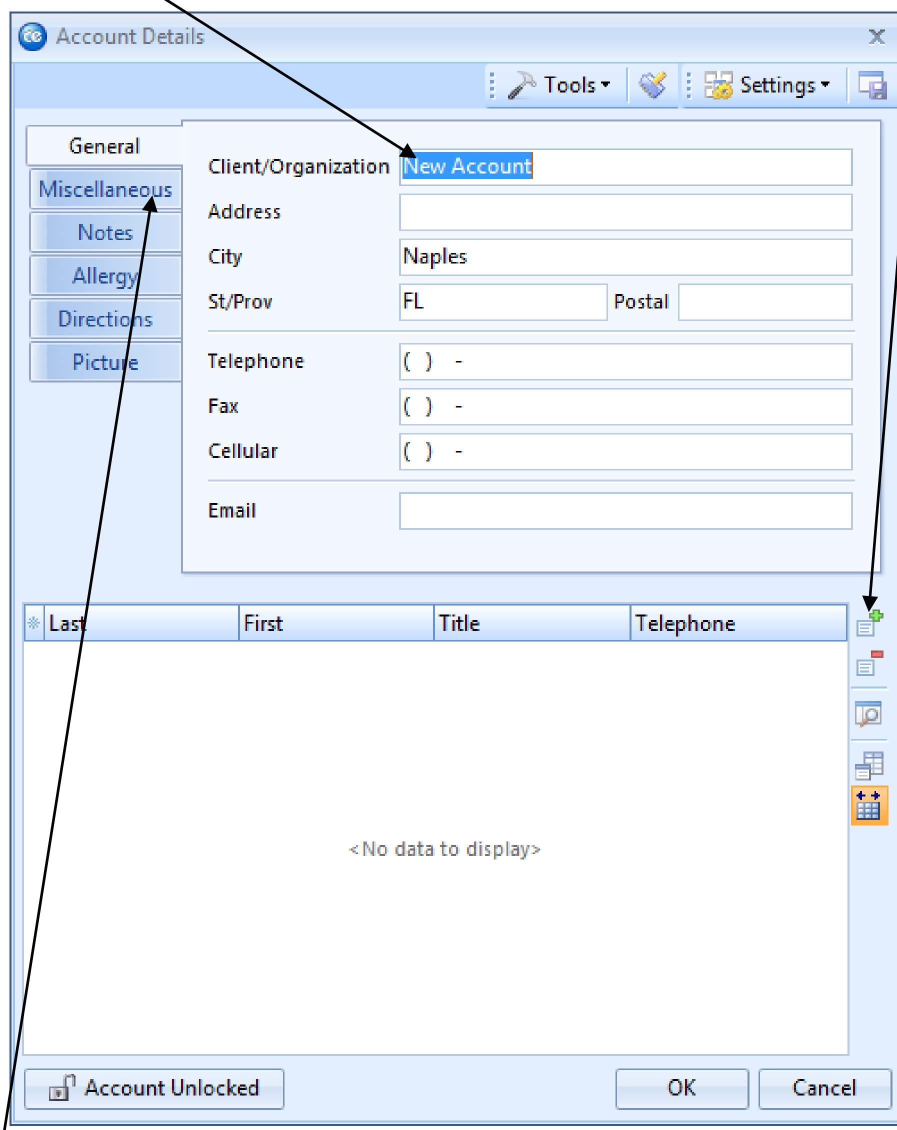
Adding a New Account

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

   Note: *You can also access the **Event Wizard** button*  *at the bottom of the Event Manager screen (if you have added the button to the toolbar, or you may access it from the button at the top left-hand side of the screen.*

3. Click the green plus sign button  at the top of the Wizard screen to add a new account.

Enter the name of the new client *Click the **Add A New Contact** button to add a new contact person*



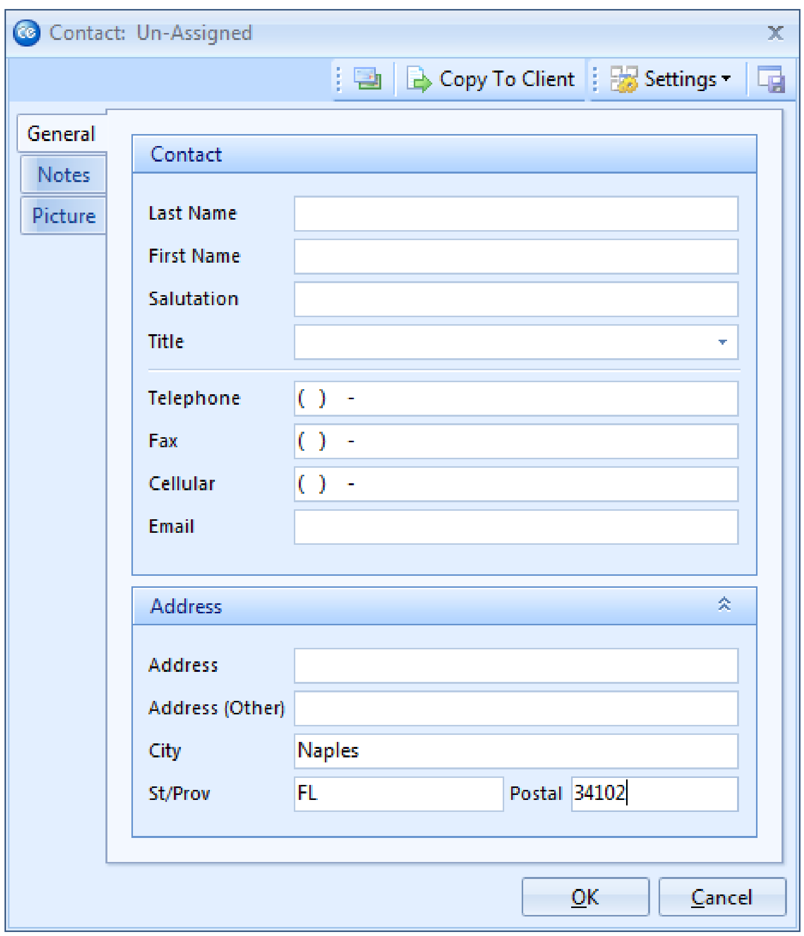
Fill in Miscellaneous information as desired

Adding a Contact Person

Can I add contact people on-the fly in the Wizard?
Contact people, like accounts and events, can be added in various places throughout Caterease, including the Event Wizard!

Adding a Contact Person

1. Click the **Add A New Contact** button, located at the lower right of the Account Details form.
2. In the form that pops up, type the last name of the new contact person into the Last Name field.
3. Press your **[Enter]** or **[Tab]** key to move to the next field.
4. Continue to fill out contact information as desired, pressing your **[Enter]** or **[Tab]** key to move from field to field.
5. In quick-pick fields, such as Title, click the down arrow at the right of the field and pick an option from the corresponding quick-pick list.
6. Click the **Credit Card Information** button , select a credit card from the quick-pick list, and then type in the remaining credit card information.
7. **[Optional]** Click on the **Notes** tab and type any notes pertinent to this particular contact person. These notes do not print anywhere; they are merely here for your reference. You can format the text you enter into this **Notes** tab by highlighting the text, clicking your right mouse button, and choosing **Font**.
8. **[Optional]** Click on the **Picture** tab, click your right mouse button, and select **Load From File** if you want to include a digital image of this contact person.
9. When finished, click the **OK** button at the bottom right of the form to close the form and save your changes.



Unit 12: Adding a New Account in Other Ways

Topics covered in this unit include:

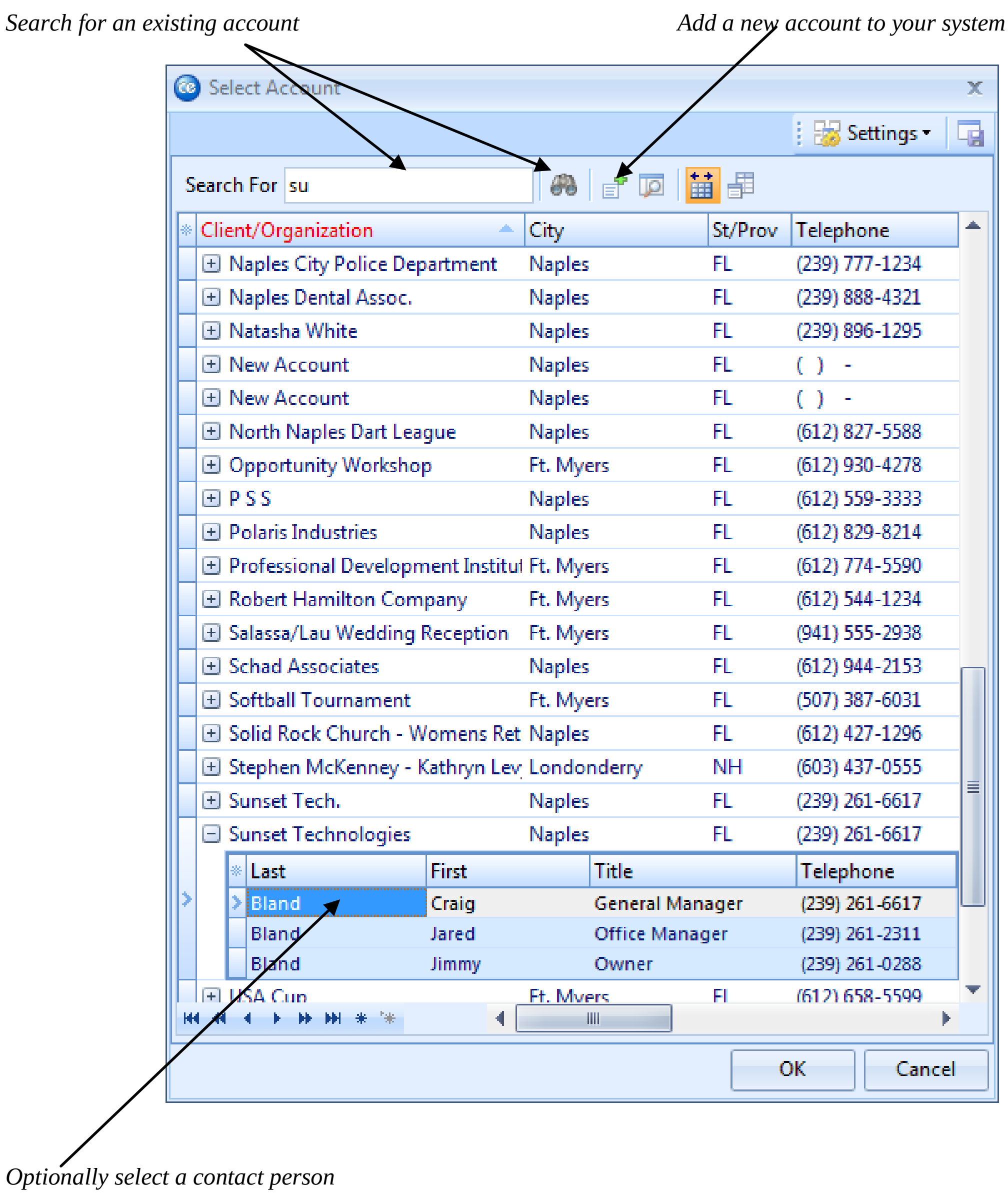
Adding a New Account in Event Manager
Adding a New Customer Who is Not A Company

Adding a New Account in Event Manager

How does an existing customer differ from a new one?
If you wish to add a new event for a new customer, that means you have never done any business with that customer before; that company's information has not yet been entered into Caterease. If, however, your new event is for an existing customer, that company's information is already in the program - you need only retrieve it. Once the details of a particular client have been entered into Caterease, you never have to type them a second time.
Note: *This topic discusses adding a new event manually from within Event Manager. As an option, see the chapter on using the Event Wizard.*

Adding a New Event

1. Access Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar.
2. Click the **Add Record** button, located at the top of your Caterease screen.
3. Click **Yes** to confirm your choice.

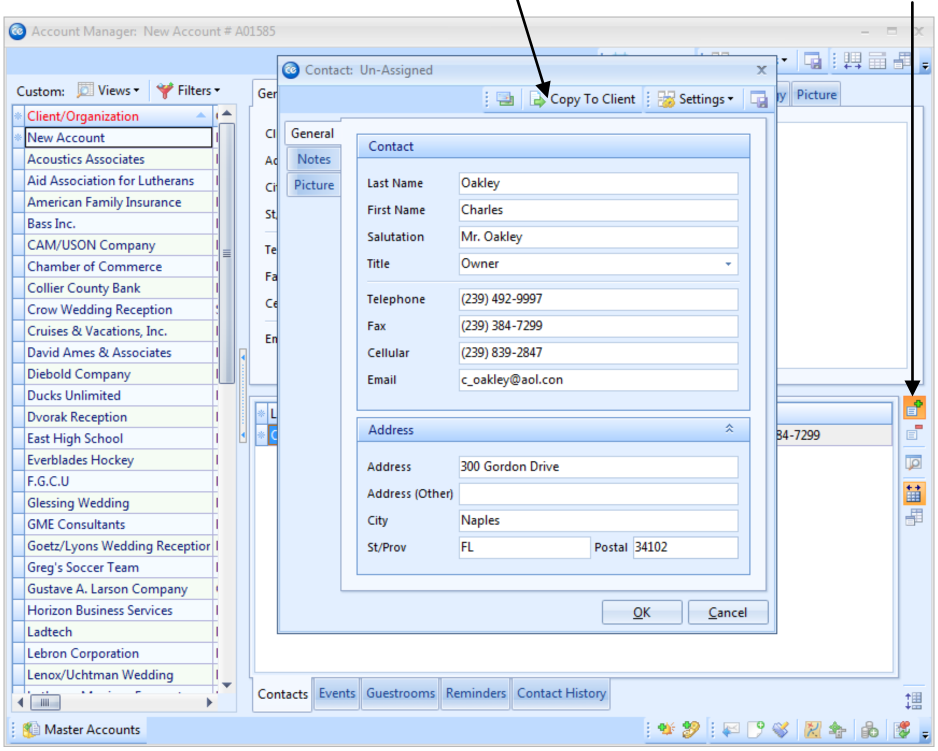


Adding a New Customer Who is Not a Company

What if my customer is an individual, as opposed to a company?
In Caterease, there is an easy, shortcut way to enter individuals as customers – so you never have to type the same thing more than once!

1. In Account Manager, click the **Add New Record** button , located in the main toolbar at the top of your Caterease screen.
   Result: *A confirmation message appears.*
2. Click **Yes** to confirm your choice.
   Note: *Don't fill out any general account details; immediately move on to Step 4.*
3. Verify that the **Contacts** tab at the bottom of the Account Manager is currently selected.
4. Click the **Add A New Contact** button , located on the right-hand side of Account Manager.
   Note: *This button is identical to the* ***Add Record*** *button you clicked in Step 2, above. Be careful not to confuse them.*
   Result: *A New Contact window appears for you to enter contact person information.*
5. Type the last name of the new contact person.
6. Press your **[Enter]** or **[Tab]** key.
   Result: *Your cursor moves to the next field.*
7. Continue to fill out contact information as desired, pressing **[Enter]** or **[Tab]** to move from field to field.
   Note: *Drop-down quick-pick lists are offered for fields such as <u>Title</u>, and can be customized by you (see Editing Quickpick Lists).*
8. Click the **Copy To Client** button, located at the top right of the New Contact window.
   Result: *All name and address information from the contact person is copied into the respective fields for the client.*
   Note: *Any existing client details (if you have already typed an address for the client, for example) will NOT be overwritten; however, you can hold your* ***[Shift]*** *key down as you click* ***Copy To Client*** *to have ALL contact person information replace existing client details, if you want.*
9. Click **OK** to close.

Click to copy the contact information to the account General fields *Add the Contact first*



Unit 13: Advanced Account Management

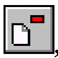
Topics covered in this unit include:

Deleting an Account
Viewing/Editing Contact Details
Viewing/Editing Events
Generating a Billing Statement
Generating Reports
Posting Payments to an Account
Combining Duplicate Accounts
Creating a Default Site Location

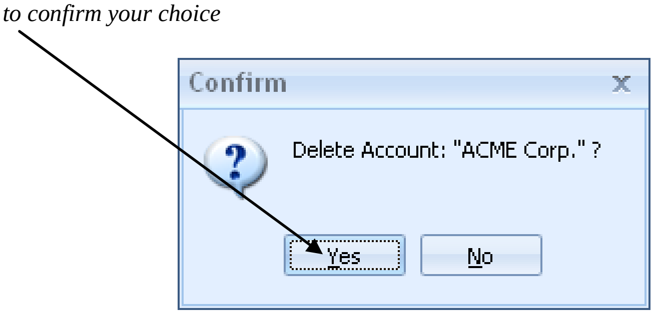
Deleting a Current Account

How do I get rid of an old account?
As this page shows, you cannot delete any accounts that have associated records such as room contracts, events, reminders, etc.; these records must be deleted first, before the account can be removed from your database.

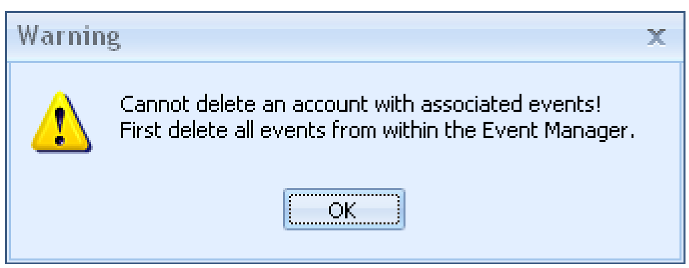
Deleting an Account

1. Check the **Events** tab, **Reminders** tab, **Contact History** tab and **Guestrooms** tab of Account Manager to confirm that there are no events booked for the current account. Caterease will not allow you to delete an account that has events assigned to it.
2. Click on the account you would like to delete (from the grid) and then click the **Delete Record** button , located on the toolbar at the top of the screen.
   Result: *A confirmation prompt appears.*
3. Click **Yes** to confirm your choice.
   Result*: The account will be permanently removed.*

Caterease will prompt you to confirm your choice



You must first delete any events associated with the account



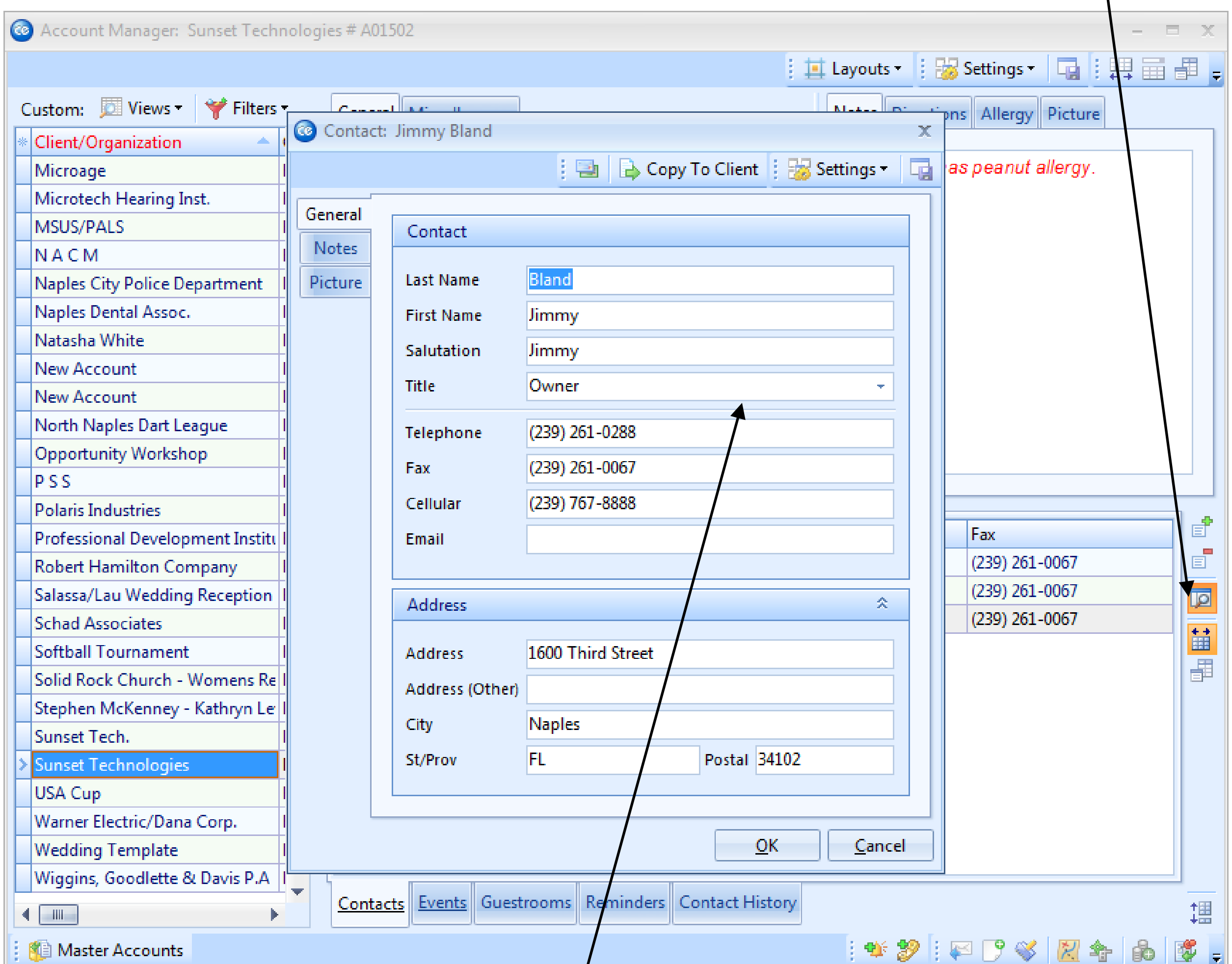
Viewing or Editing Contact Details

How do I change existing contact information?
You can edit any contact information you have entered into Caterease quickly and easily, following the steps below.

Editing Contact Details

1. Click the **Contacts** tab in the bottom window of Account Manager (if it is not already selected).
2. Select one of the contact people listed on that tab to edit.
3. Click the **Show Contact Details** button , located on the lower right of your Account Manager form.
4. Click any tab on the Contact form and edit information as desired, as described on the previous page.
5. When finished, click **OK** to save your changes.

*Click **Show Contact Details** button*



Enter or edit information

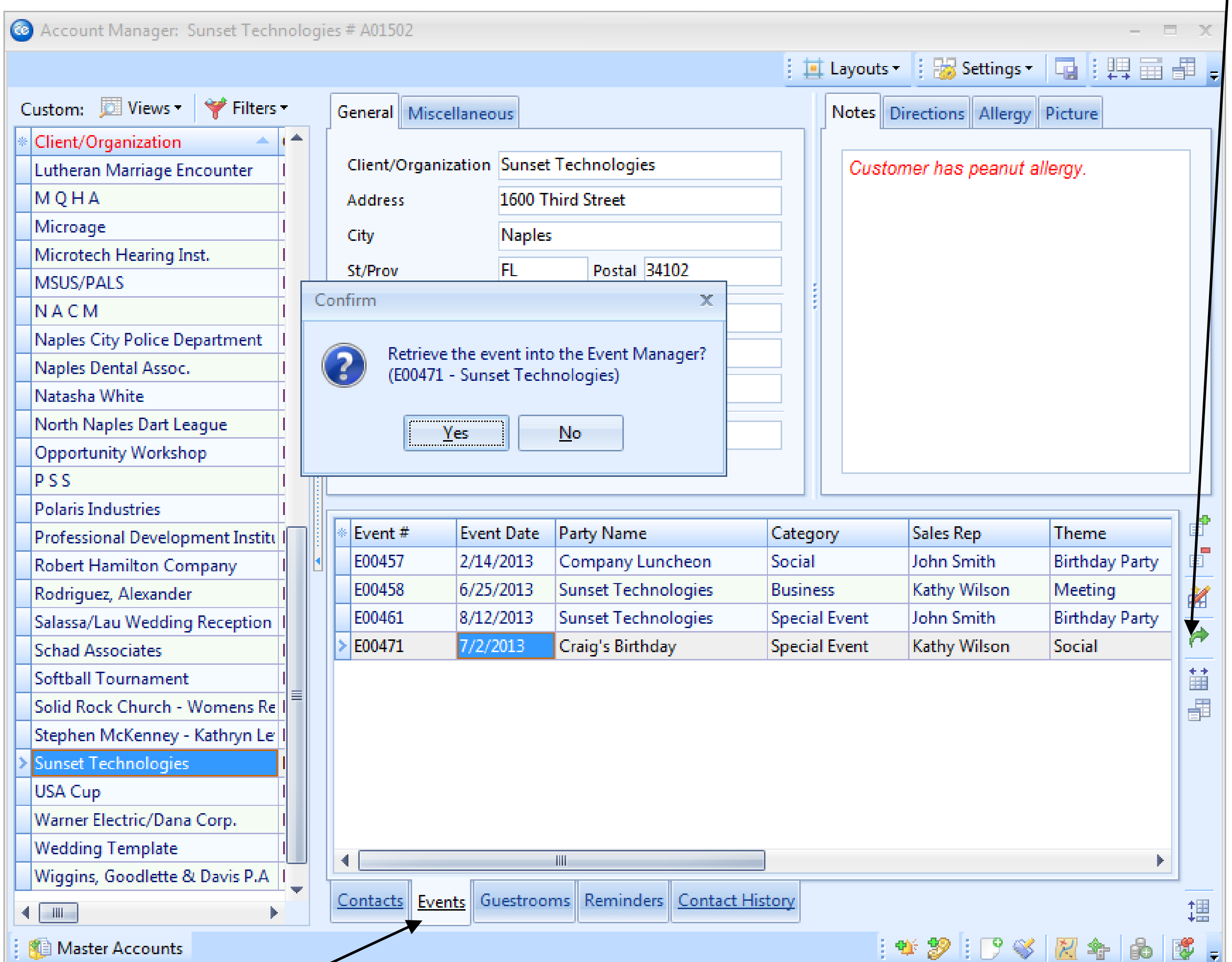
Viewing or Editing Events

Don't I have to be in Event Manager to do this?
As with adding events from Account Manager, we are looking here at the flexibility of Caterease. If you want to retrieve an event in Caterease, you of course have to end up in Event Manager. However, here again the program allows you to zigzag from one location to another. In this case, you are in Account Manager and you decide you want to take a closer look at a particular event a customer has held (or is holding) with you. One mouse click will not only open Event Manager for you, but will place you on the exact event you want to examine.

Viewing/Editing an Event

1. Click the **Events** tab in the bottom window of Account Manager (if it is not already selected).
2. Select one of the events listed on that tab.
3. Click the **Select** button,  , located on the lower right of the Account Manager screen.
4. Click **Yes** to confirm your choice. You will be taken into Event Manager and placed on the event which you selected.

*Click the **Select** button to retrieve the highlighted event*



Be sure to select Events tab

Generating a Billing Statement

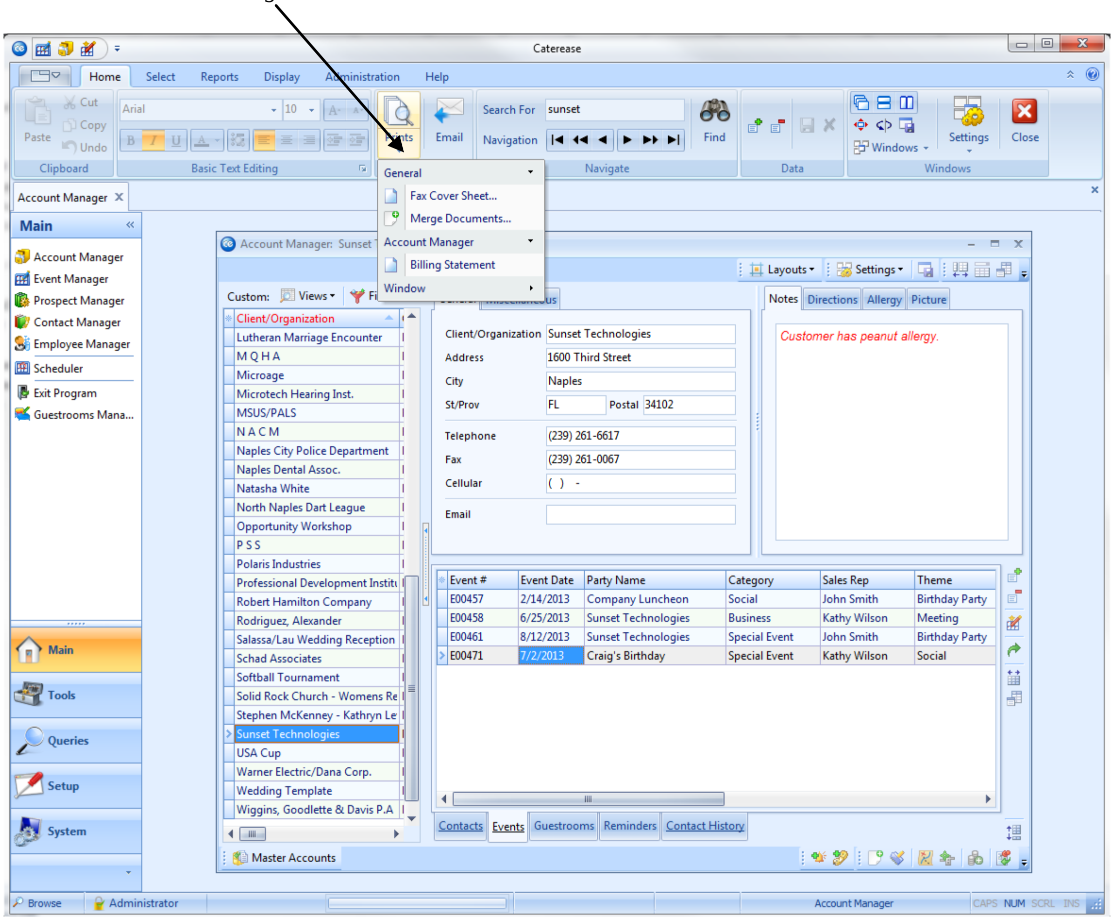
What kinds of prints can I generate from Account Manager?
In addition to a Fax Cover Sheet, you can print any number of custom merge letters (if you own the Marketing Tools add-in to the program) and a Billing Statement that will consolidate all events or guestrooms contracts booked by an account onto one statement. These prints are all available by opening Account Manager and clicking the **Prints** button on the **Home** ribbon tab.

- **Fax Cover Sheet**
  This option allows you to quickly print a fax cover sheet for the current account, including an optional memo section. The client name, contact person, fax number, etc., defaults from the current account, but can be edited on-the-fly, if desired.

- **Merge Documents**
  If you own the Caterease Marketing Tools Package, this option allows you to print one of your custom merge documents.
  Note: *Since you are in Account Manager, event information will not merge into a document. Therefore, you should only print documents with no merge fields or only merge fields of account information from this area of the program.*

- **Billing Statement**
  If the current account has many events with you, this option allows you to consolidate all of that financial information into one single billing statement.
  Note: *The top portion of this print can be edited in your Miscellaneous Print Designer.*

*Click **Prints** in Account Manager*



Generating Reports from Account Manager

What kind of reports can I generate from Account Manager?

There are several reports available to you from the Account Manager. All of them are accessible by clicking the **Accounts** button on the **Reports** ribbon tab.

- **Account List (Events)**
  This report lists every account in your database, and all events (excluding those with a status of "Cancelled") associated with those accounts.

- **Account List (Guestrooms)**
  This report lists every account in your database, and all group bookings (excluding those with a status of "Cancelled") associated with those accounts.

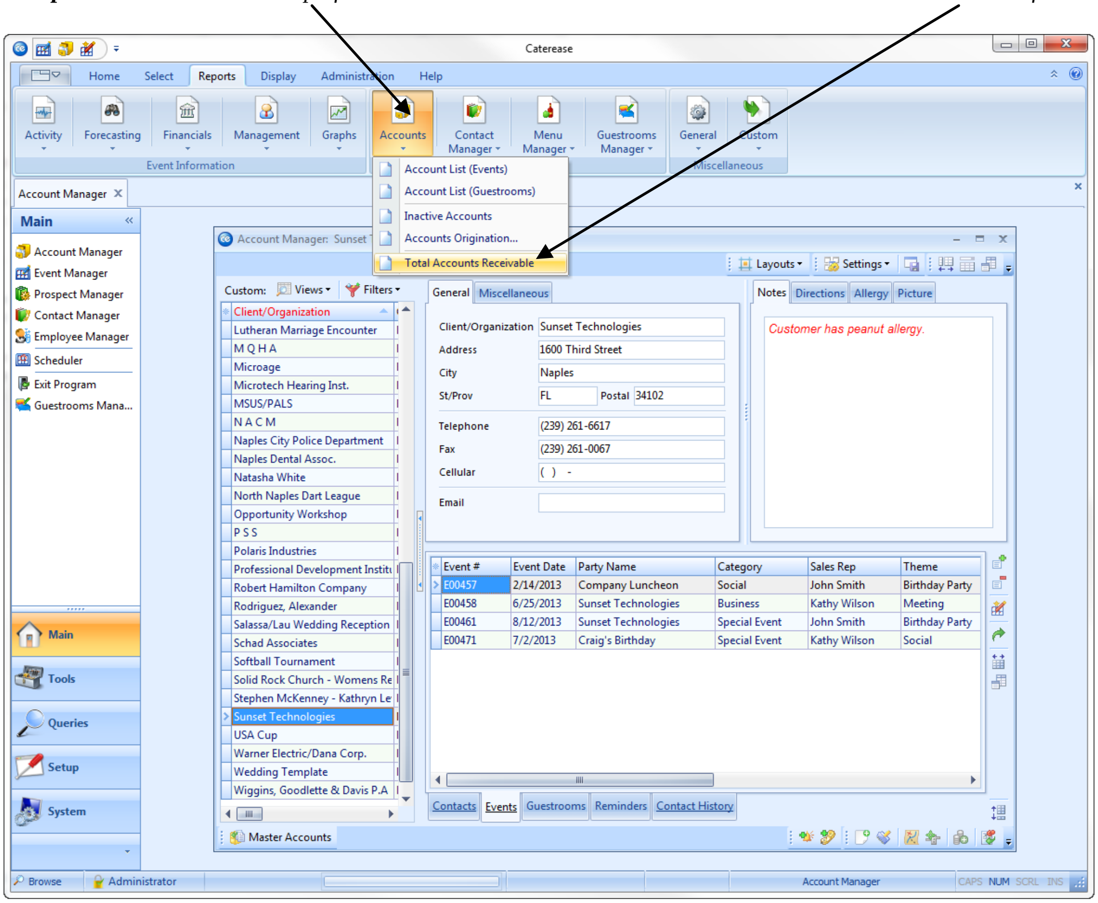
- **Inactive Accounts** *(Not available in the Express version)*
  This report lists all accounts in your database that have no associated events or group room bookings - that is, all accounts with whom you've never done any business.

- **Accounts Origination** *(Not available in the Express version)*
  This report will list all accounts who were added to your database during the established date range. ***Note:*** *For a list of all accounts in your database, set a date range of "Less than or equal to" today's date.*

- **Total Accounts Receivables** *(Not available in the Express version)*
  This report lists all money owed to you by all accounts, including both event revenue and group room booking revenue (if applicable). Also indicated is how many days past due the money is ("0-30 days," "31-60 days," etc.).

Click ***Reports > Accounts*** *at the top of the screen*

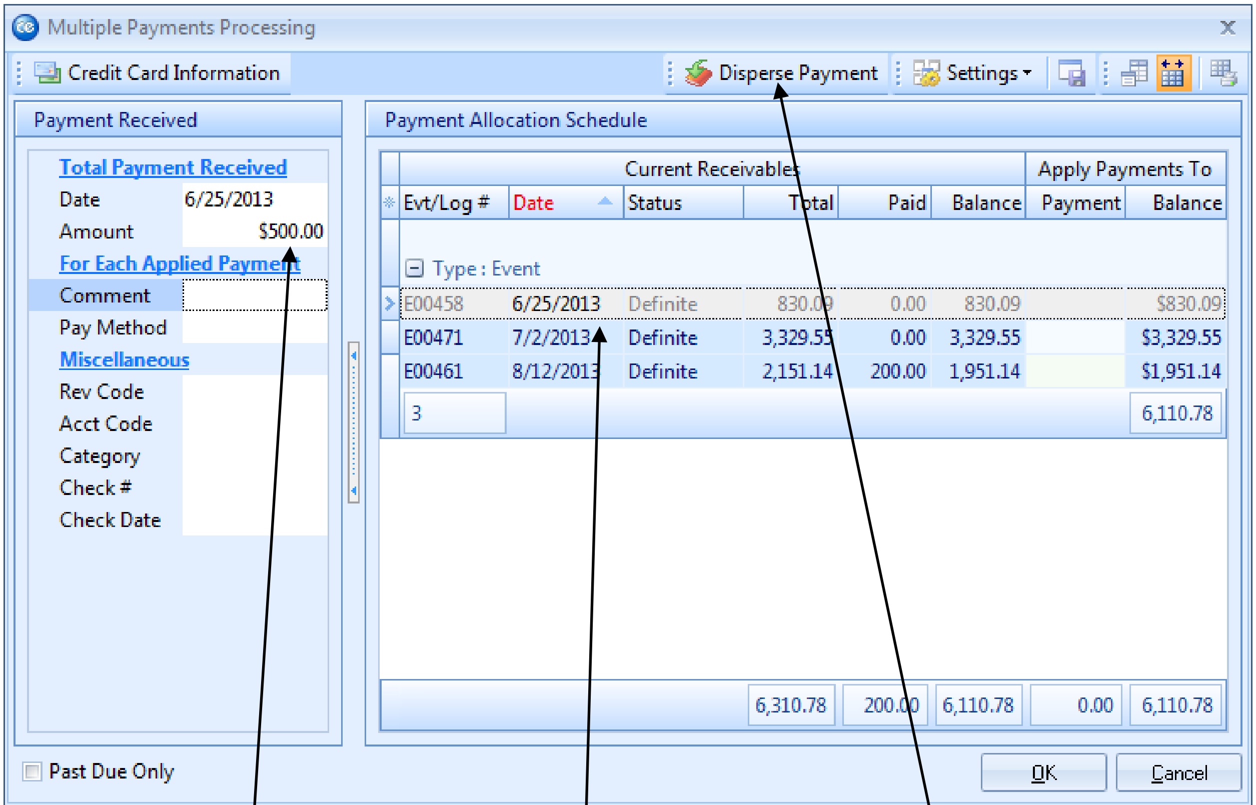
Select ***Total Accounts Receivables*** *at the bottom of the list*



Posting Payments to an Account (See image on following page.)

What if a large account wants to pay me for several events at once?
Since this process is more about the account than it is about a specific event, you would post this large payment in Account Manager. A handy tool helps you spread large payments out across any number of events for a customer.

1. In Account Manager, retrieve the client you want to post a payment for.
2. On the toolbar at the bottom of the Account Manager, click the **Multiple Payments Processing** button .
   Result: *The Multiple Payments Processing window displays, listing all events with outstanding balances.*
   Note: *As an option, you can also click the* **Select** *ribbon tab* **>*Payments* > *Apply Payments***.
3. On the left-hand side of the Multiple Payments Window, enter payment information (Amount, Pay Method, etc.).
   Note: *The payment date will default to the current date, but can be changed if desired. Data-entry tools are available, such as a drop-down calculator to enter payment amount, and quick-pick lists for* <u>*Pay Method*</u> *and* <u>*Credit Card*</u>*. If credit card information has been stored with the contact person's information, click the* ***Credit Card Information*** *button at the top of the window to retrieve.*
4. Highlight the particular events in the window to which you would like to apply payments.
   Note: *If no events are listed in the window, then this client has no balances currently past due. In this case, you can remove the check from the* ***Past Due Only*** *checkbox at the lower left of the window to see all events with balances, regardless of due dates.*
5. Click **Disperse Payment** at the top right of the window to have Caterease automatically disperse your payment amount, or manually enter the desired payment amount for each individual event directly into the <u>Payment</u> column in the grid.
   Note: *Caterease will automatically disperse payment by paying off the first event in total, moving on to the second and repeating until payment funds are depleted. Once all events are paid in full, Caterease will offer to apply any leftover payment amount as a credit to the final event in the list. You can cancel the dispersing by clicking* ***Cancel*** *at the bottom of the window.*
   Note: You must highlight events first (Step 5) before Caterease will automatically disperse payments.
6. Respond to message prompts as desired, depending on whether the payment does not meet or exceeds the balance due:
   - If payment amount is less than balance due, a message will appear, indicating the remaining balance due.
   - If payment amount exceeds balance due, a message will appear, offering to apply remaining payment as a credit to the last event selected. If you accept, the remaining payment amount is applied to the last event. If you decline, a message will inform you of the remaining payment amount; however, that remaining amount will not be applied to anything.
7. When finished, click **OK**.
   Result: *A confirmation message displays.*
8. Click **OK** again.
   Result: *The Multiple Payments Processing window closes and your payments are processed.*



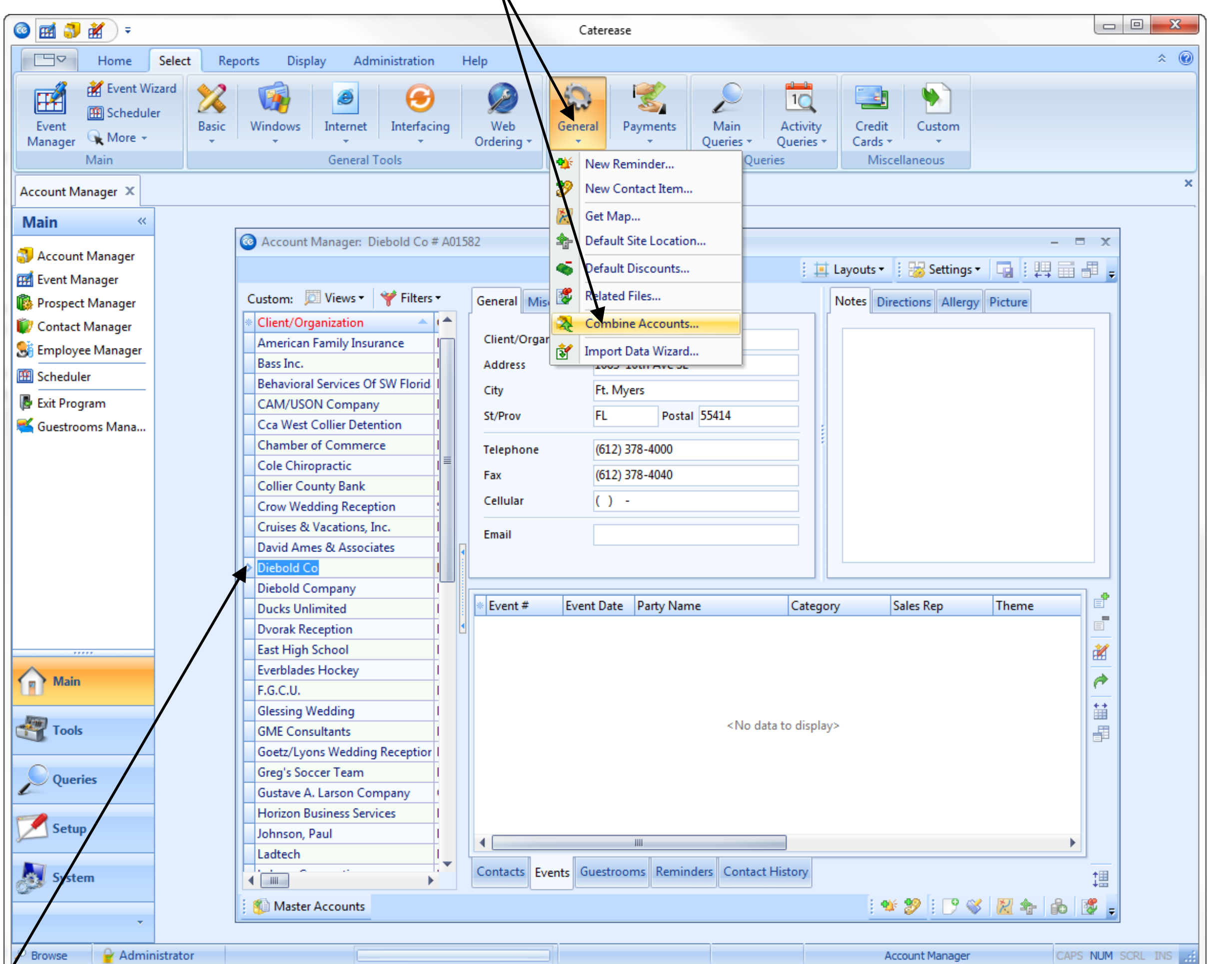
Enter Payment Details *Select Events* *Click **Disperse Payment***

Combining Duplicate Accounts

Oops! I entered the same client twice, and each one has events in my program. Can I combine them?
Yes, you can – and the powerful **Combine Accounts** tool will do all the work for you!

1. In Account Manager, find the duplicate account which you want to remove from the program.
2. Click the **Select** in the ribbon located at the top of your Caterease screen.
3. Choose **General > Combine Accounts**.
   Result: *A confirmation message appears.*
4. Click **Yes** to confirm.
   Result: *An account selection window appears.*
5. Select an existing account (or add a new one) to which you will reassign all of the events, contact people, and other details of the client you are removing.
   Note: *See note in Step 2, above, for hints on searching for records.*
6. Click **OK**.
   Result: *A confirmation message appears.*
7. Click **Yes** to confirm.
   Result: *The information from your first account (selected in Step 2, above) is moved to your second account (selected in Step 6, above) and you are prompted to delete the first account from Step 2.*
8. Click **Yes** to delete the first account (selected in Step 2, above).
   Result: *The account is deleted.*

Choose ***Select*** > ***General*** > ***Combine Accounts***



Select a duplicate account from the list (Diebold Co.)   *Click **Yes**, then select account to combine into*

Creating a Default Site Location

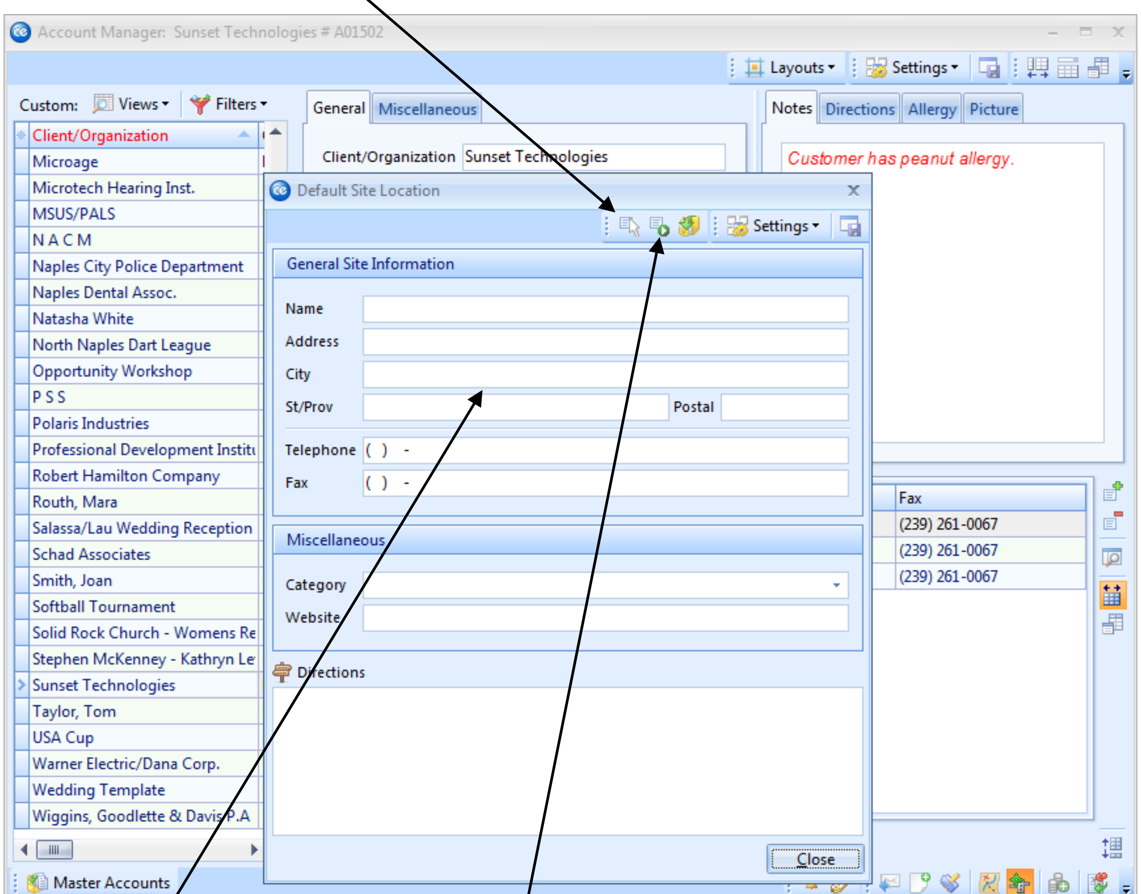
My clients have preferred locations where they always want their parties held.
You can assign a default site location to any or all of your clients in Account Manager, so whenever you book an event for that new client, his or her default site location comes into that new event automatically.

1. In Account Manager, find the account for which you wish to add a default site location.

   On the toolbar at the bottom of the Account Manager, click the **Default Site Location** button .
   Result: *The Default Site Location window o*
2. Enter the general information, such as name, address, etc., by simply typing into each field and optionally pressing your **[Enter]** or **[Tab]** key to move to the next field.
   Note: *If the default site location is a commonly used one, or if the client wants to use their address as the default site location, see the tip below for important information on how to avoid repetitive typing.*
3. Click the **Directions** tab and enter detailed directions to the default site location.
4. Click **Close**.
   Result: *The window closes and your changes are saved.*

Tip: If the default site location is a commonly used one, click the **Site Locations Database** button at the top right of the Default Site Location window to select it from your default database. If the location is not yet in the database, you can type its information in the Default Site Location window and click the **Add to Site Locations Database** button to add it for future use. If the client wants to use his address as the default location, click the **Copy from Client** button, also located at the top right of the window.

Click to select a stored site location



Type the site location information *Add the new site location to the site location database* *Click to add a Default Site Location*

Unit 14: Customizing the Screen Display

Topics covered in this unit include:

Customizing Fields in Account Manager
Customizing the Event Manager Screen Display
Using the Split Screen Display
Accessing the Full-Expand Mode
Customizing the Sub-Event Screen Display
Customizing the Sub-Event Layout
Customizing the Event Wizard Display
Creating a Custom Layout on the Event Wizard Display

Customizing Fields in Account Manager

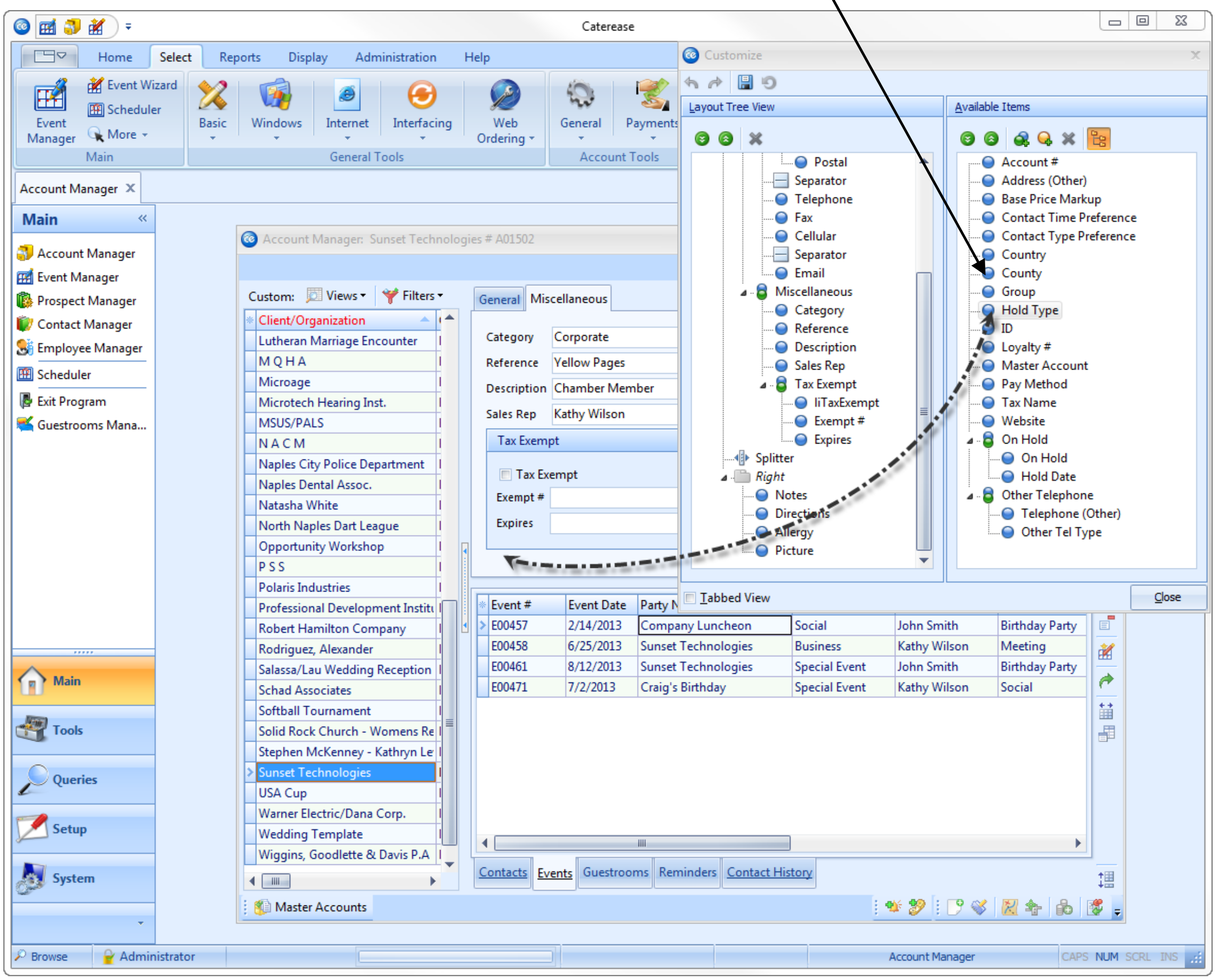
How about if I want to get rid of specific fields?

Get rid of fields, rearrange fields, make up your own fields. With Caterease, you can completely redesign the screens to suit your needs.

Removing Fields from the Screen

1. Click your right mouse button over the field name on either the **General** or **Miscellaneous** tab.
   Note: *Do not right click the fields themselves, but rather on the name of the field.*
2. Right-click.
3. Select **Customize**.
   Result: *A pop-up Customize window appears.*
4. Hold your left mouse button down on any field name and drag it and drop it into the Available Items pane.
   Result: *The field is removed from the screen.*
5. Click the **Save Window Settings** button (located at the top of the screen) if you wish to set this as your new default arrangement.

Drag/drop fields to and from the Customize window



Note: *Refer to the Customization tutorial and corresponding manual for detailed explanations on how to customize your screens in Account Manager.*

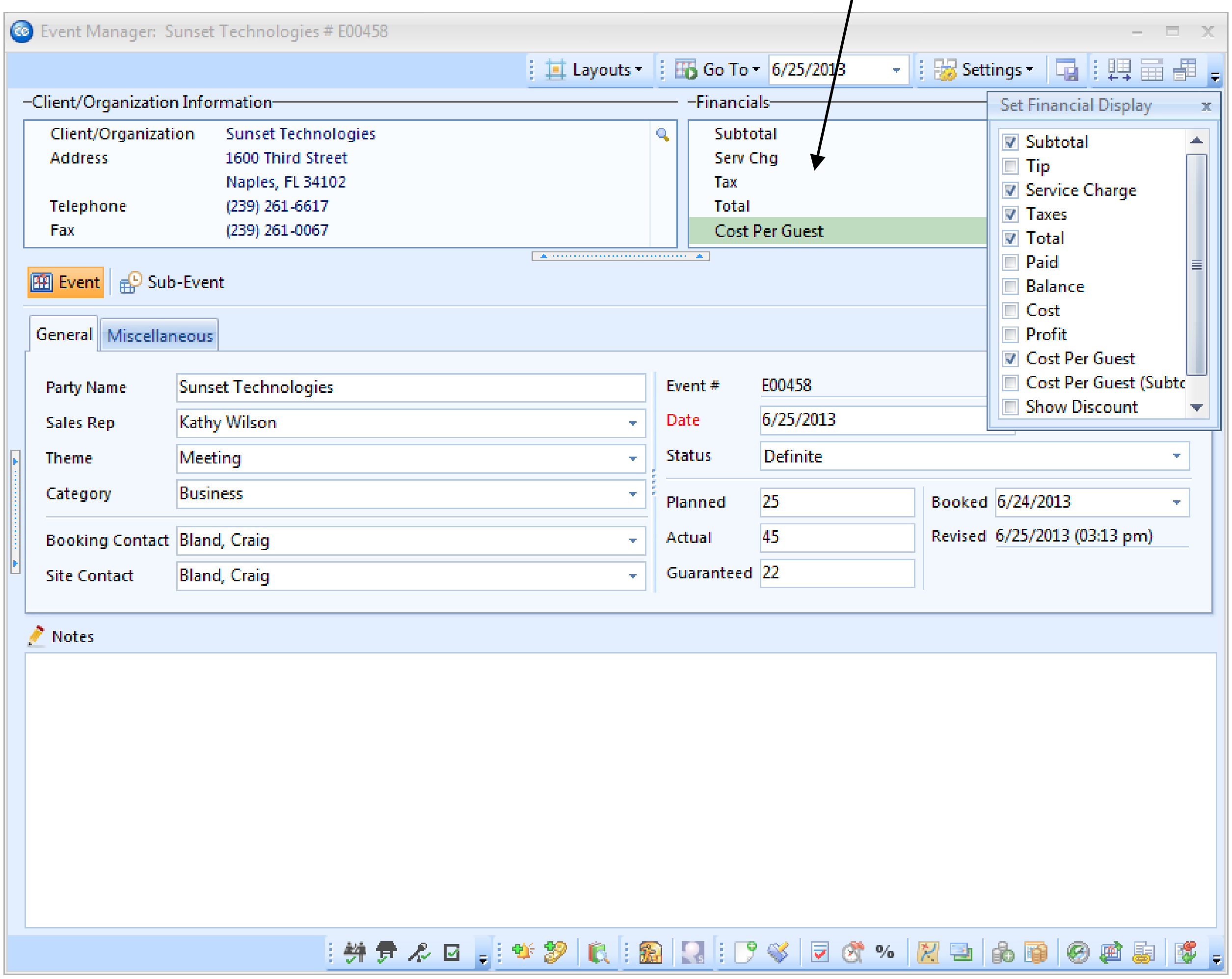
Customizing the Screen Display in Event Manager

What if I don't need some of this information on the screen?
Caterease gives you the unique ability to completely redesign your various screen displays throughout the program to suit your particular business needs. Here, we discuss customizing the areas at the top of the Event Manager screen, as well as modifying the tabs on the General display.

Adding or Removing Client/Organization Information/Financial Details

1. Float your mouse pointer over the client information (Client/Organization Information, top left) or financial information (Financials, top right) at the top of the Event Manager screen.
2. Click your right mouse button.
   Result: *A pop-up window appears, listing optional fields to be displayed in this area of the screen.*
3. Click or un-click checkboxes next to any fields.
   Result: *Fields with check marks next to them will appear on the Event Manager screen.*

Right-click anywhere on the screen, in this case the Financials area



Note: *Refer to the Customization tutorial and corresponding manual for detailed explanations on how to customize your screens in Event Manager.*

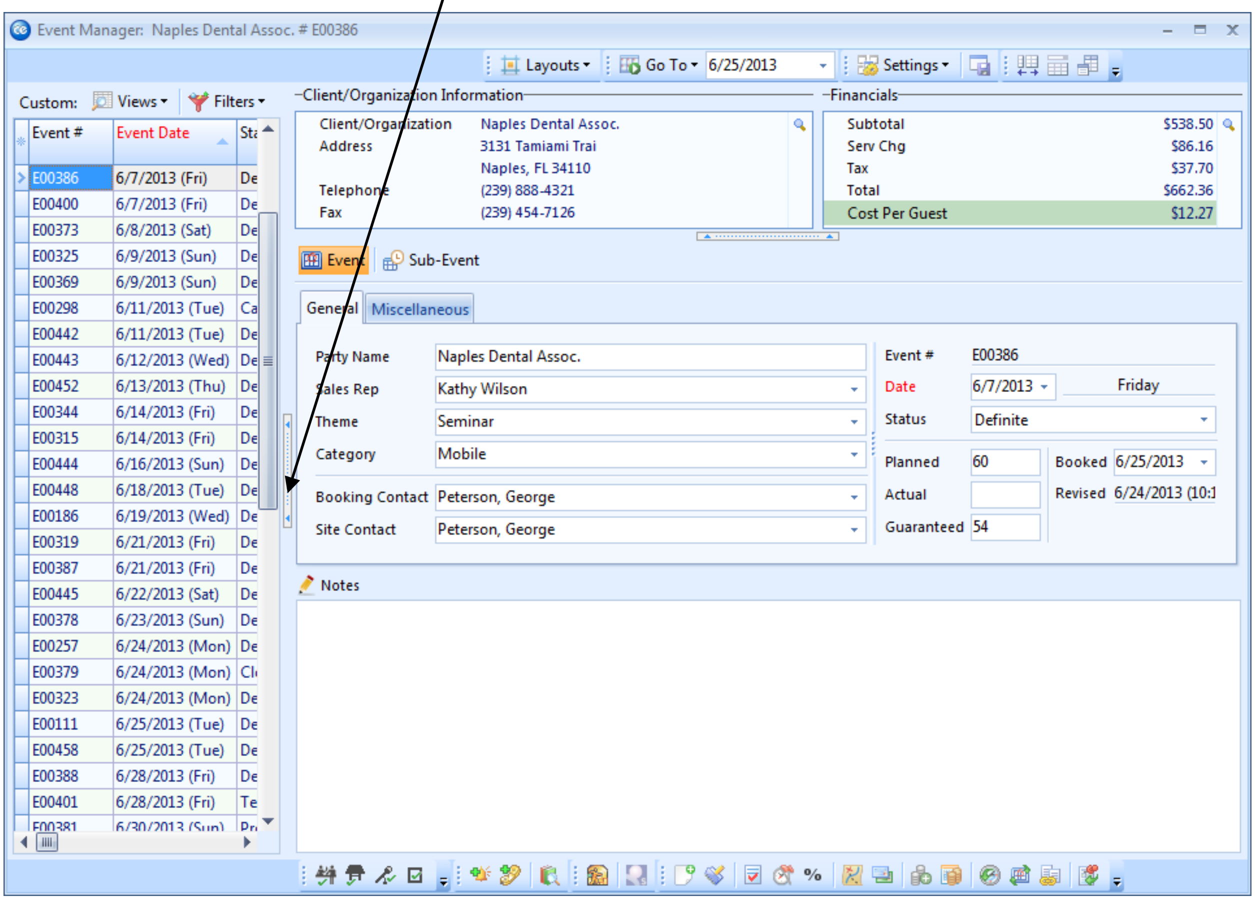
Using the Split Screen in Event Manager

Can I use the incremental search feature in Event Manager, too?
To search for records incrementally, you must first sort them by one of the columns in the grid – as in the split screen available in Account Manager. This same option is available in Event Manager, as well.

Showing the Split Screen

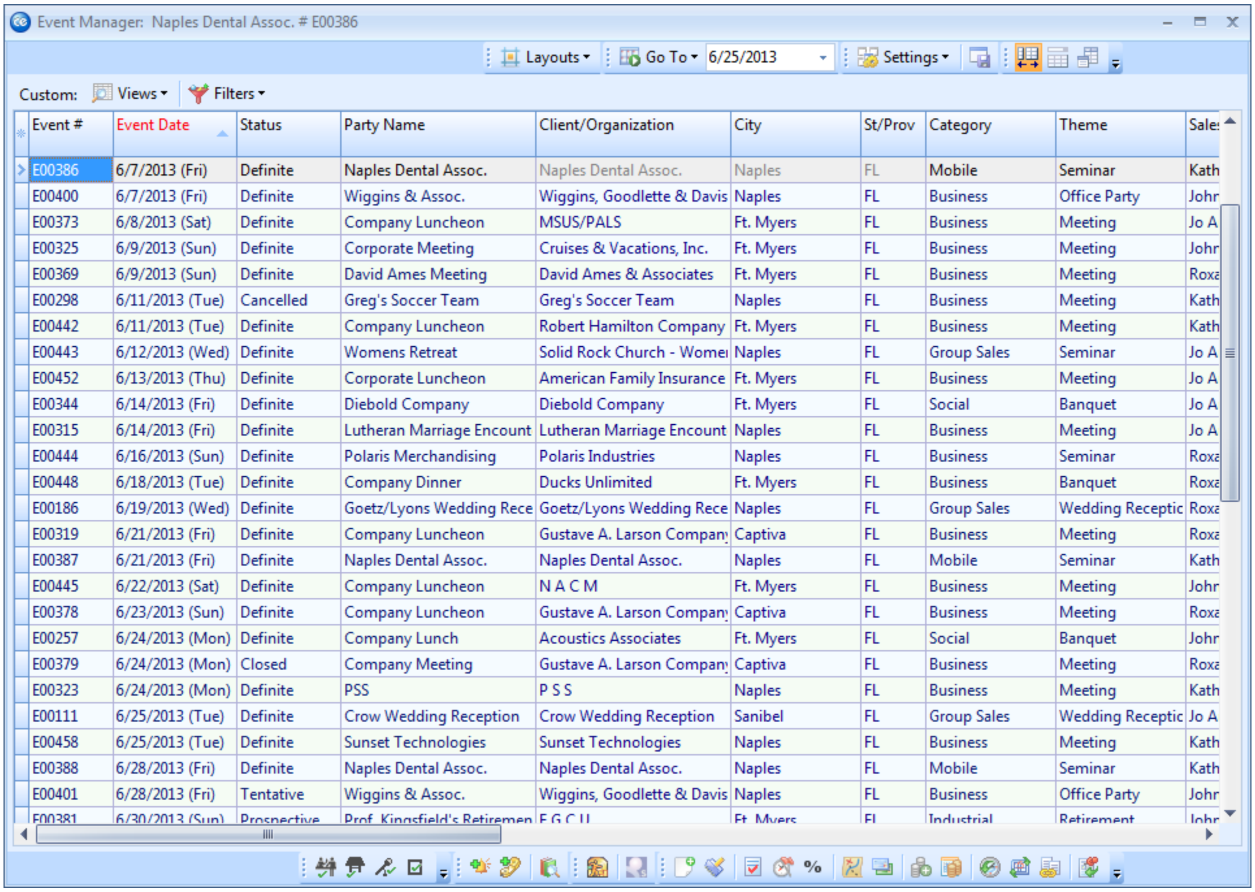
1. Move your mouse pointer over the "quick-snap" bar along the left-hand side of Event Manager.
2. Click the area of the "quick-snap" bar pointing in the direction you want the pane to adjust: i.e., toward the screen display to stretch or open the pane; away from the display to collapse the pane.
   Result: *The pane will collapse or stretch in the direction the arrows on the button are pointing.*
3. To return the pane to its original size, click that same button, which will now be pointing in the opposite direction.
   Result: *The pane will return to its original size.*
4. Click the **Save Window Settings** button (located at the top of the screen) if you wish to set this as your new default arrangement.
   Result: *A confirmation message will appear; click* ***Yes*** *and your new arrangement will be saved.*

Use the "quick-snap" bar to split the screen



Accessing the Full-Expand Mode

1. To view the entire grid, click the **Display Full Grid** button , located at the top of the window.
2. Click the **Quick Column Customizing** button , located at the top left-hand side of the window (to the left of the Event # column).
   Result: *Any columns with check marks will appear in the grid.*
3. [**Optional**] Drag column headings left and right in the grid to reposition them, and click the column heading to sort by that detail.
4. Click the **Save Current Window Settings** button if you want this to be saved as the default arrangement for your expanded grid.



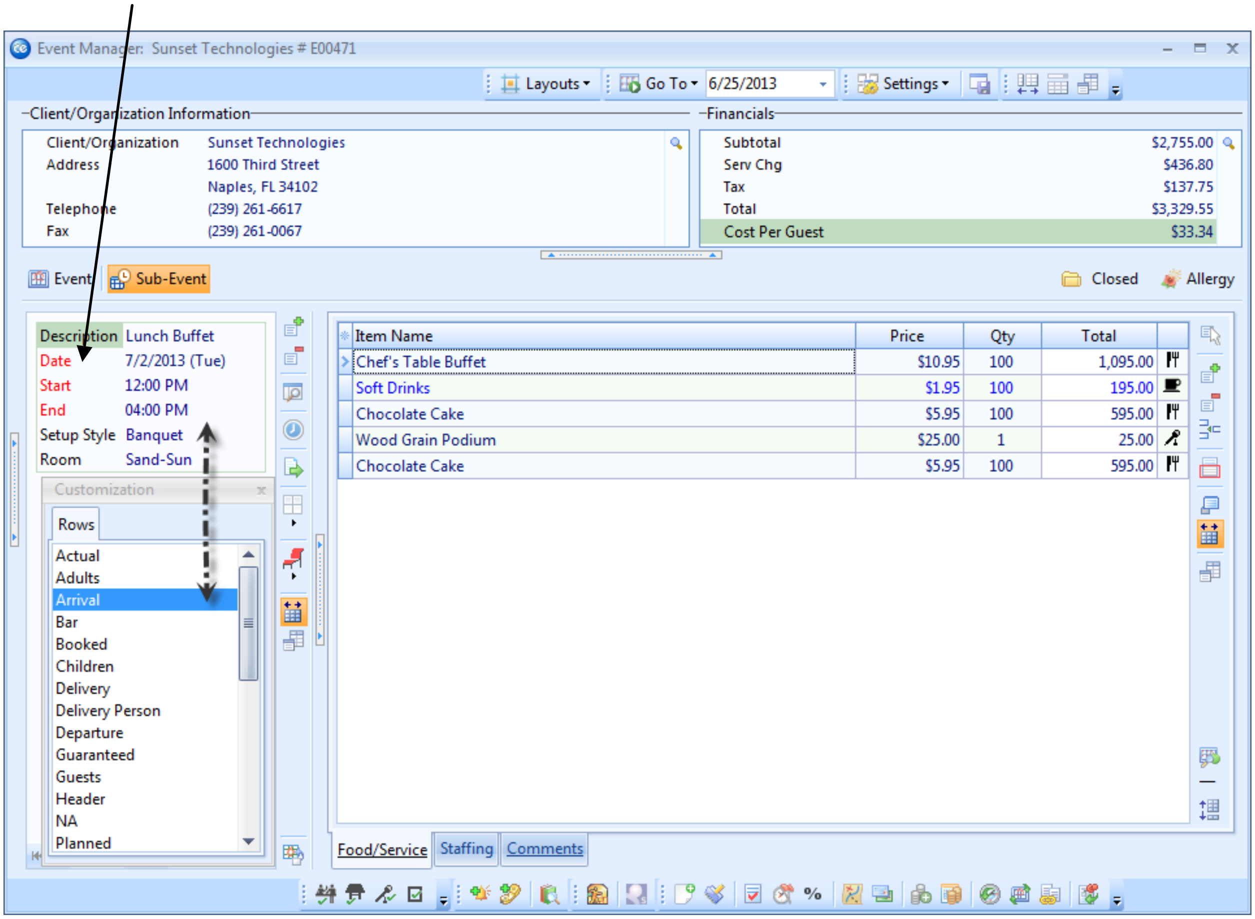
Customizing the Sub-Event Screen Display in Event Manager

How do I make the Sub-Event window more applicable to my company?
Out of all the windows in Caterease, the Sub-Event window is the one you are most likely to customize, since it contains certain information that may not apply to your business. You may want to remove the site location details if you don't do off-premise parties, for example, or remove the room information if you do not have banquet rooms.

Adding/Removing Fields from the Screen

1. Click anywhere in the pane on the left-hand side of the Sub-Event window.
2. Select **Field Chooser**.
   Result: *A small Customization window opens.*
3. To add fields, hold your left mouse button down on any field name in the Customization window and drag it to the Sub-Event details window (just above the Customization window).
4. Hold your left mouse button down and drag items up or down to reposition them on the screen.
5. If you want this to be the new default look for the program, click the **Save Window Settings** button .

Sub-Event Details pane



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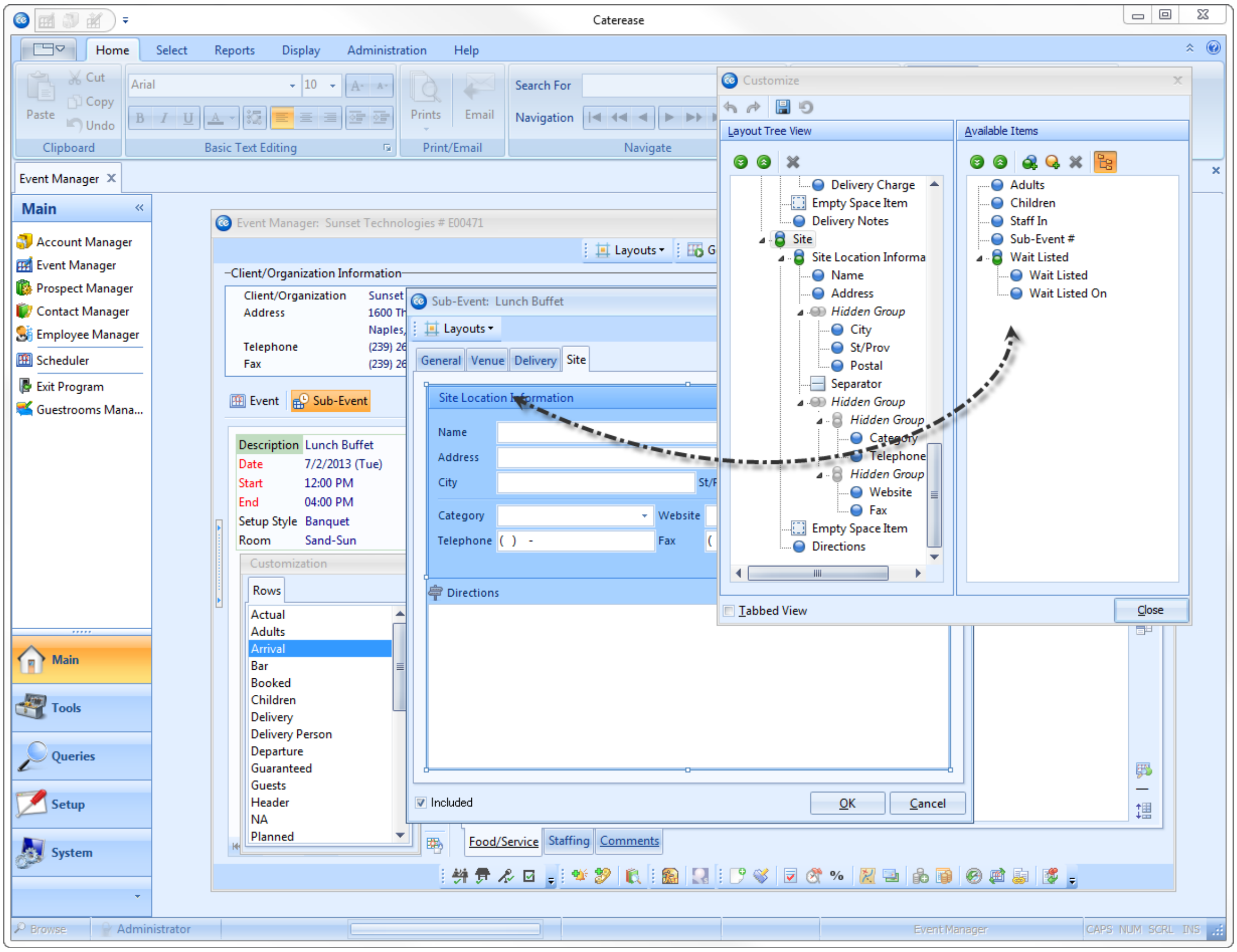
Customizing the Sub-Event Screen Layout

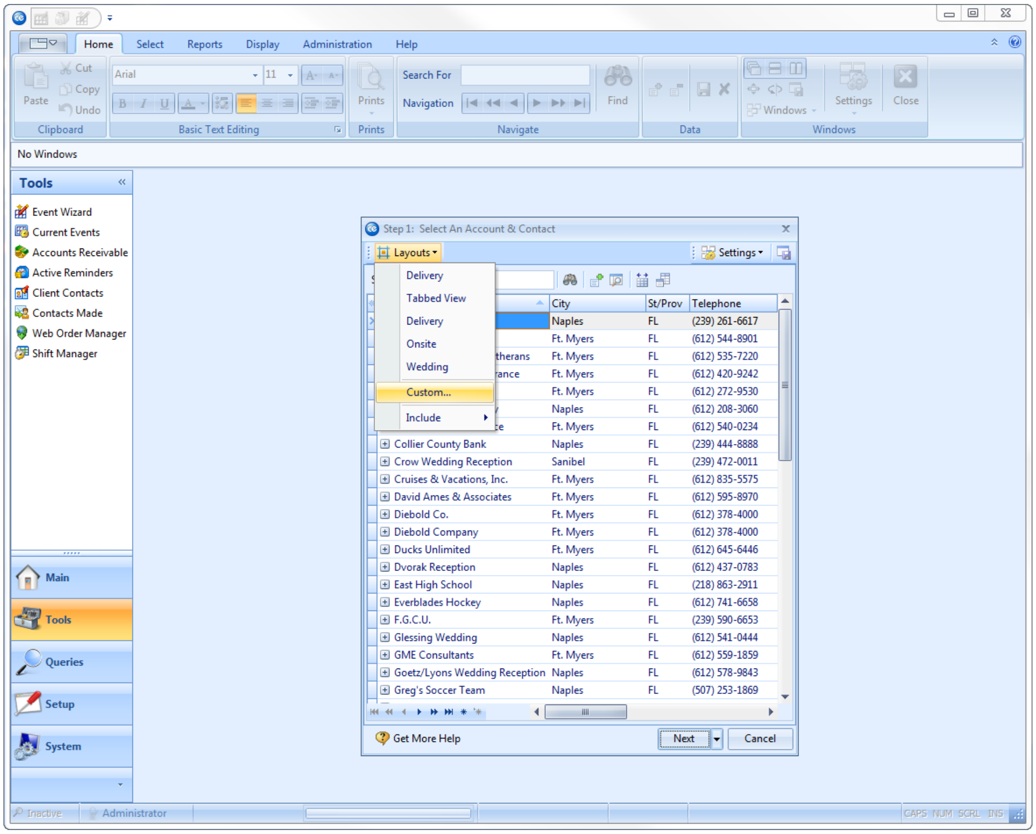
1. Open the Sub-Event display by double-clicking inside the Sub-Event Details pane. Alternatively, you may click the **View/Edit Current Sub-Event** button  .
2. Right-click anywhere on the Sub-Event window.
3. To remove a tab from the window, right click on the tab you want to remove and click **Customize**.
4. Hold your left mouse button down on the tab and drag and drop that tab into the Available Items pane of the Customize window.
   Result: *That tab is removed from the Sub-Event window.*
5. If you want this to be the new default look for the program, click the **Save Window Settings** button .



Note: Because of the endless variations available to you when customizing your screens, this topic is addressed here in very general detail. Refer to the Customization tutorial and corresponding manual for detailed explanations on how to customize your screen display.

Customizing the Event Wizard Display

Am I able to customize the screen display in the Event Wizard to reflect a particular type of event that I book on a regular basis?
You can create your own custom Event Wizards to be used for any type of event you might book; you can create a custom wizard for off-premise parties, one for deliveries, one for weddings, etc., each showing the specific informaiton that applies to that type of event. You can even create layouts which have certain details conditionally required, depending on what type of event is being booked.



Creating a Custom Layout

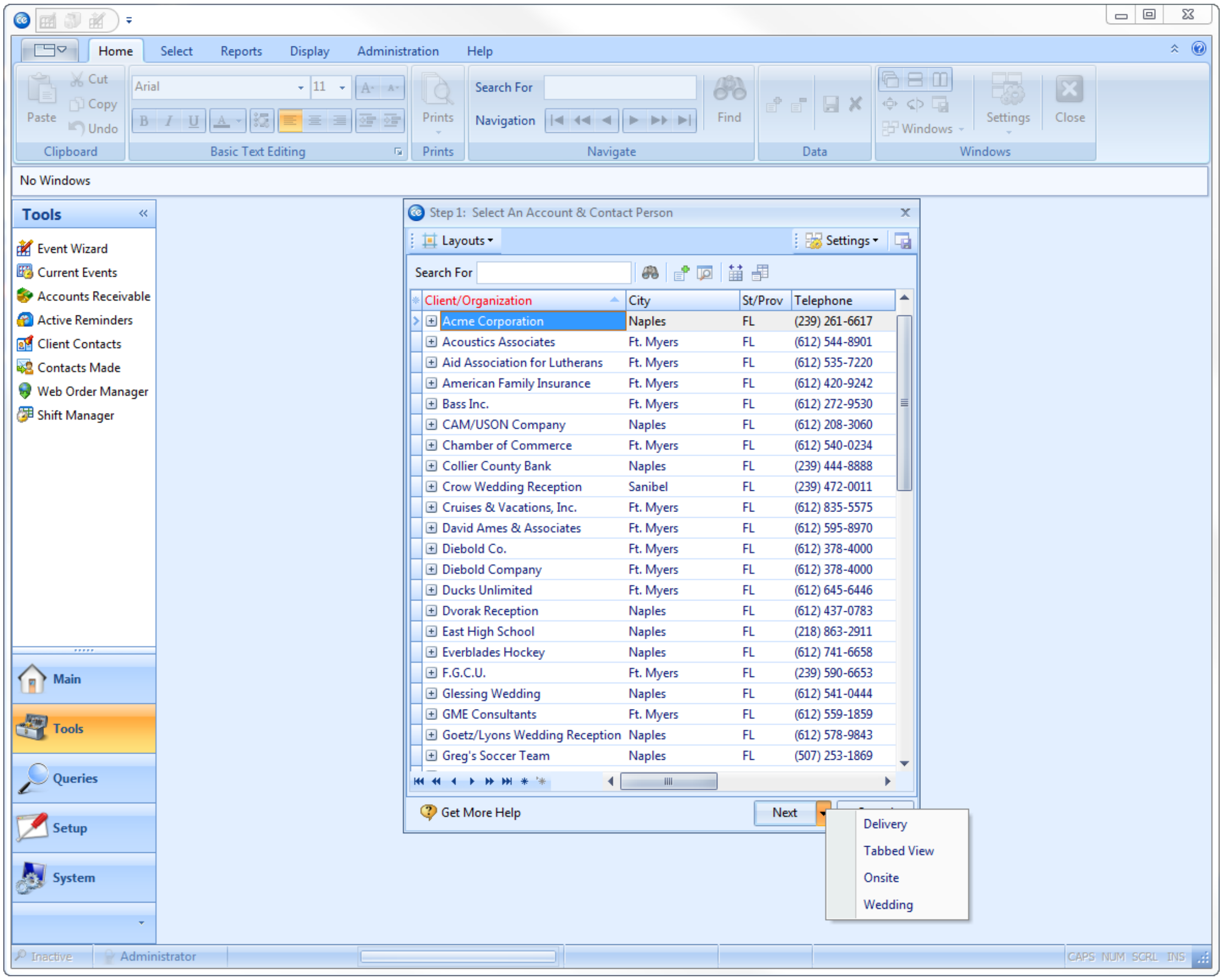
1. Open the Event Wizard.
2. From the Step 1 window, click the **Next** button.
3. Click the **Layouts** button at the top left of the Event Wizard window and choose **Custom**.
Result: *The Custom Layouts window displays.*
4. [**Optional**] Click the **Shared** button at the bottom left of the window if you want your new layout to be available to all users on your Caterease network.

5. Click the **Add Layout** button , located at the top left-hand side 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 display by right-clicking the layout name and choosing **Copy From Current**.*

6. Type a name of your new layout and click the **Save Current Layout** button .
Note: *If you want to retrieve custom window size and position settings, cutom grid views or custom toolbar settings with your saved layout, select those options first (Layouts > Include) before selecting your custom layout.*
7. If you want this to be the new default layout of this window from now on, click the **Save Window Settings** button . 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** > W**indow Settings**.
8. Click the X at the top right-hand side of the Custom Layout window to close it.

Accessing an Existing Layout

1. Open the Event Wizard.
2. Click the down arrow to the right of the **Next** button.
3. Select the desired layout from the drop-down list.

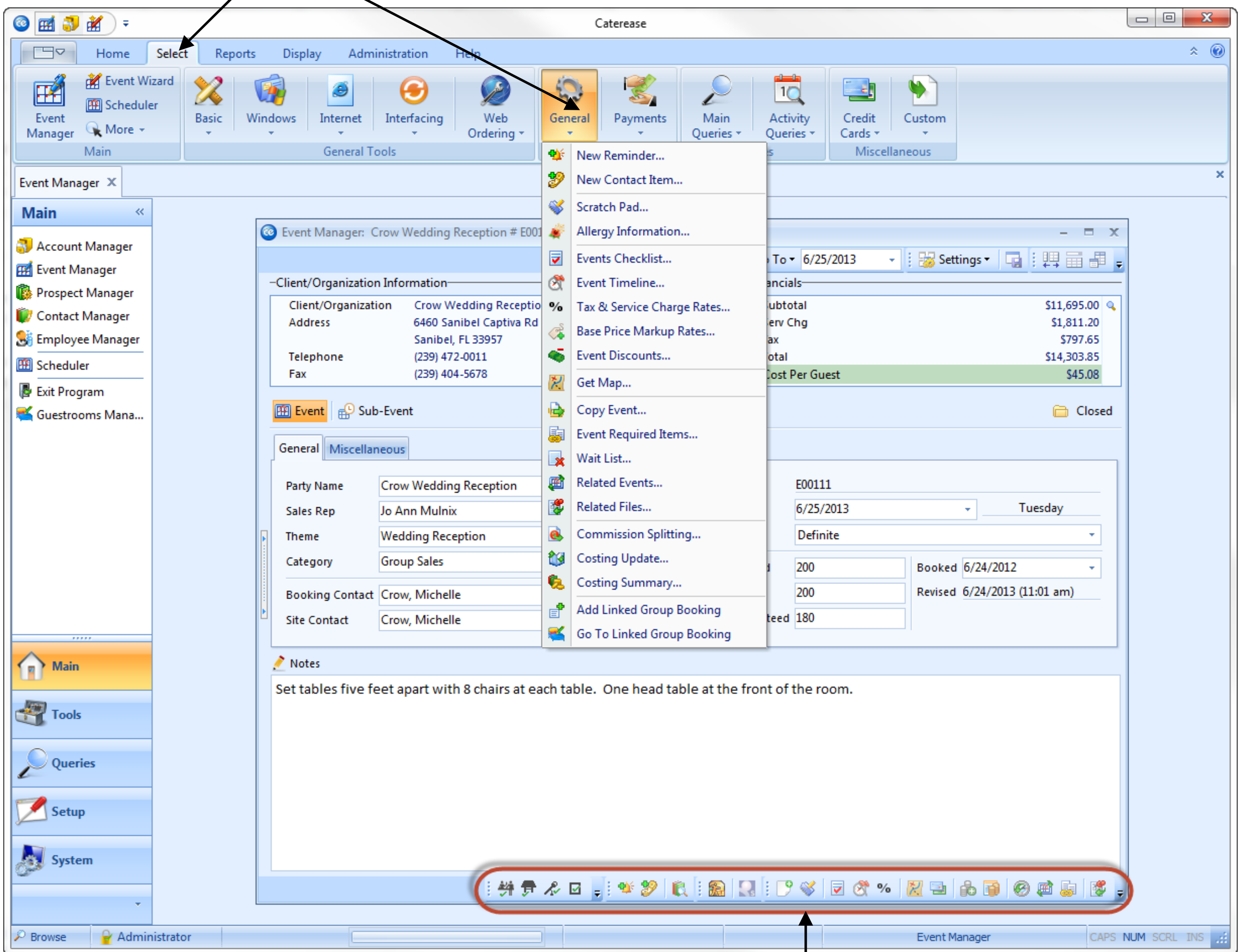


Unit 15: Event Manager Tools

Topics covered in this unit include:

Viewing/Editing an Event Checklist
Viewing/Editing an Event Timeline
Viewing/Modifying Event Tax Rates
Viewing Driving Directions
Adding Payments
Scheduling Deposits
Viewing Event Status History
Viewing Related Events
Establishing a List of Required Items
Viewing/Adding Event-Related Files
Applying Discount Rates
Managing Multiple Events Simultaneously
Copying an Event
Switching/Editing Account Information

*Click the **Select** ribbon tab and the **General** button to access certain event-specific tools*



Most event tools are accessible through the Event Manager toolbar

The Event Manager Toolbar

At the bottom of your Event Manager screen is a toolbar with various event-specific features, such as the Event Checklist, Payments, Deposits, etc. More features (Copy Event, Costing Summary, etc.), are available through the **Tools** > **Select** > **General** menu at the top of the Caterease screen.

Many of these tools are discussed in detail on the following pages.

Using the Event Checklist

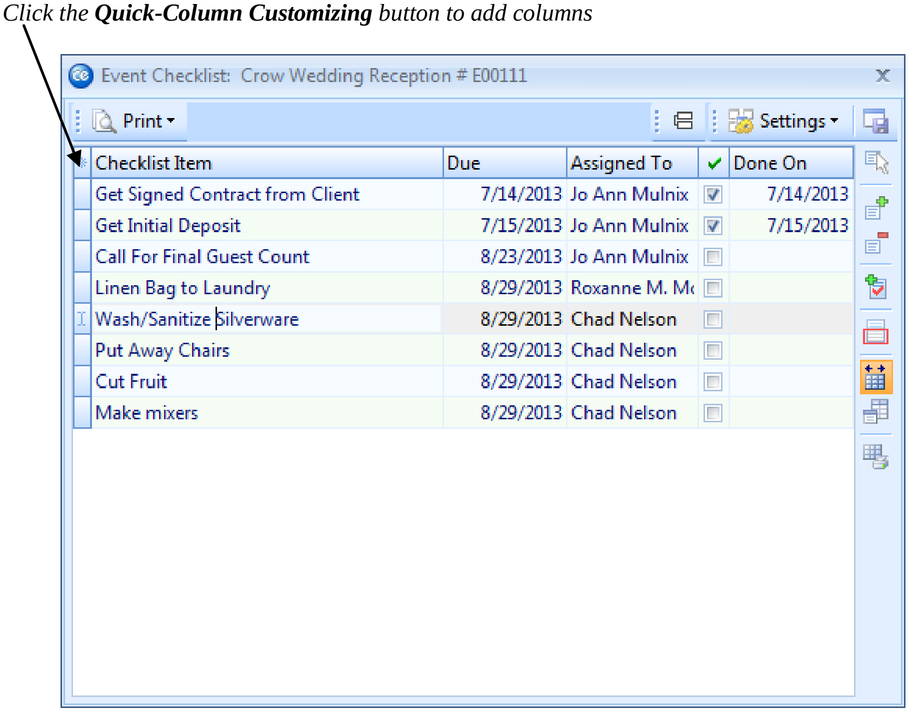
What is an Event Checklist?
A checklist is much like a to-do list for your event: a list of tasks that need to be performed in relation to the event.

1. Click the **Event Checklist** button, located on the lower right-hand side of the Event Manager screen. ***Result:*** *The Event Checklist window displays.*
2. To add a new checklist to an event, click the **Add A New Checklist Item** button, located on the right-hand side of the Event Checklist window.
3. Type the checklist item into the <u>Checklist Item</u> field.
4. Enter a due date for the checklist item by clicking the down arrow to the right of the <u>Due</u> field to access a drop-down calendar.
5. Select the person who is responsible for completing the item by clicking the down arrow to the right of the <u>Assigned To</u> field and choosing a name from the quick-pick list.
6. [**Optional**] To add notes related to the checklist item, click the **Show Checklist Item Notes** button. In the text block which displays, type notes as desired.
7. When an item has been completed, click the corresponding checkbox in the <u>Is Done</u> column.

Retrieving Items from Default Checklist

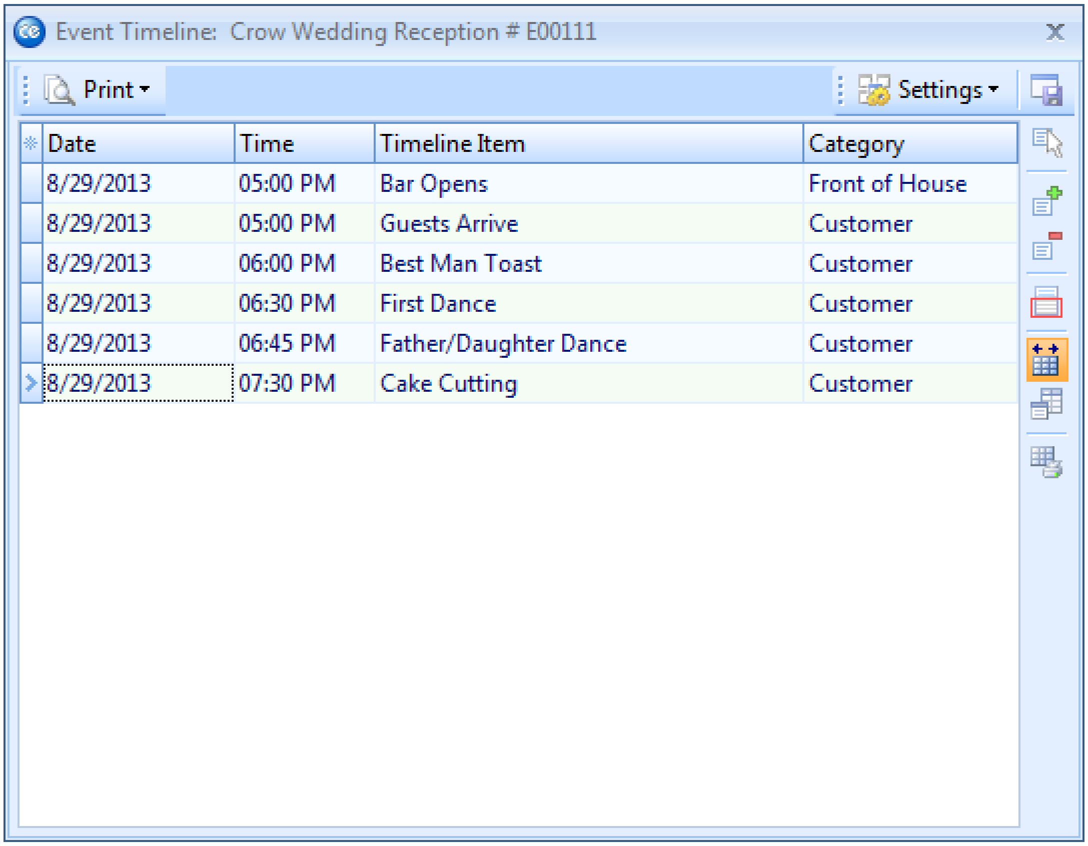
1. From the Event Checklist window, click the **View or Select from Default Checklists** button.
2. To add an existing checklist to a particular event, click the desired default checklist category from the left-hand pane of the window to select it.
3. From the right-hand pane, highlight one or more checklist items.
4. Click **OK**.
5. Click in the <u>Due</u> field and type a due date or click the down arrow to the right of the field to access the drop-down calendar.
6. Click the <u>Assigned To</u> field and type the name of the person responsible for this item or click the down arrow to choose a name from the corresponding quick-pick list.
7. When an item has been completed, click the corresponding checkbox in the <u>Is Done</u> column.

*Click the **Quick-Column Customizing** button to add columns*



Using the Event Timeline

In addition to the various time fields available in Event Manager, you can also create a detailed timeline unique to each party.



1. Click the **Event Timeline** button , located on the lower right-hand side of the Event Manager screen.
   Result: *The Event Timeline window displays.*
2. To add a new timeline to an event, click the **Add a New Timeline** button , located on the right-hand side of the Event Timeline window.
   Result: *A new field displays (today's date auto-populates, by default).*
3. Type the time the timeline item is due into the Timeline field. Alternatively, you may use the up-and-down arrows to select a time.
4. Type a description of the timeline item into the Timeline Item field.
5. Select a Category (Front of House, Back of House, etc.), by clicking the drop-down list to the right of the Category field to indicate who is responsible for completing the timeline item.
6. [**Optional**] To add notes related to the timeline item, click the **Show Timeline Item Notes** button . In the text block which displays, type notes as desired.

Viewing a Default Event Timeline

1. From the Event Timeline window, click the **View or Select from Default Timeline** button , located at the top right-hand side of the window.
2. To add an existing timeline item to a particular event, click the desired timeline category from the left-hand pane of the window to select.
3. From the right-hand pane, highlight one or more timeline items.
4. Click **OK**.
5. Click in the Time field for a particular item and enter a time, or use the up-and-down arrows to adjust.
6. [**Optional**] Enter a Category to use for tracking of this item, or click the down arrow to choose a name from the corresponding quick-pick list.

Displaying Event Tax/Service Charge Rates (See image on the following page)

Do I have to set a tax schedule every time I book an order?
Remember our rule of thumb: You should never have to type the same thing more than once. Your Caterease program has a default tax and service charge rate that you can create for all new orders (described later in this manual). This page addresses adjustments to the tax/service charge rates of one particular order.

Editing Tax/Service Charge Rates on-the-fly

1. In Event Manager, click the **View/Edit Event Tax/Service Charge Rates** button %, located at the lower right-hand side of the screen.
2. Click in any field and edit as desired, typing rates or using the up-and-down arrows to increase or decrease the rate one percentage point, respectively.
3. Press your **[Enter]** key to move from field to field.

Applying Tax on Service Charge

1. Click in the checkbox labeled Tax Serv Chg, above the far right-hand column.
2. If the tax rates are different for the tax on Service Charge, click the **At New Rate** checkbox. Then click in any rate field below and edit as desired.
3. Press your **[Enter]** key to move from field to field.

Making the Order Tax Exempt

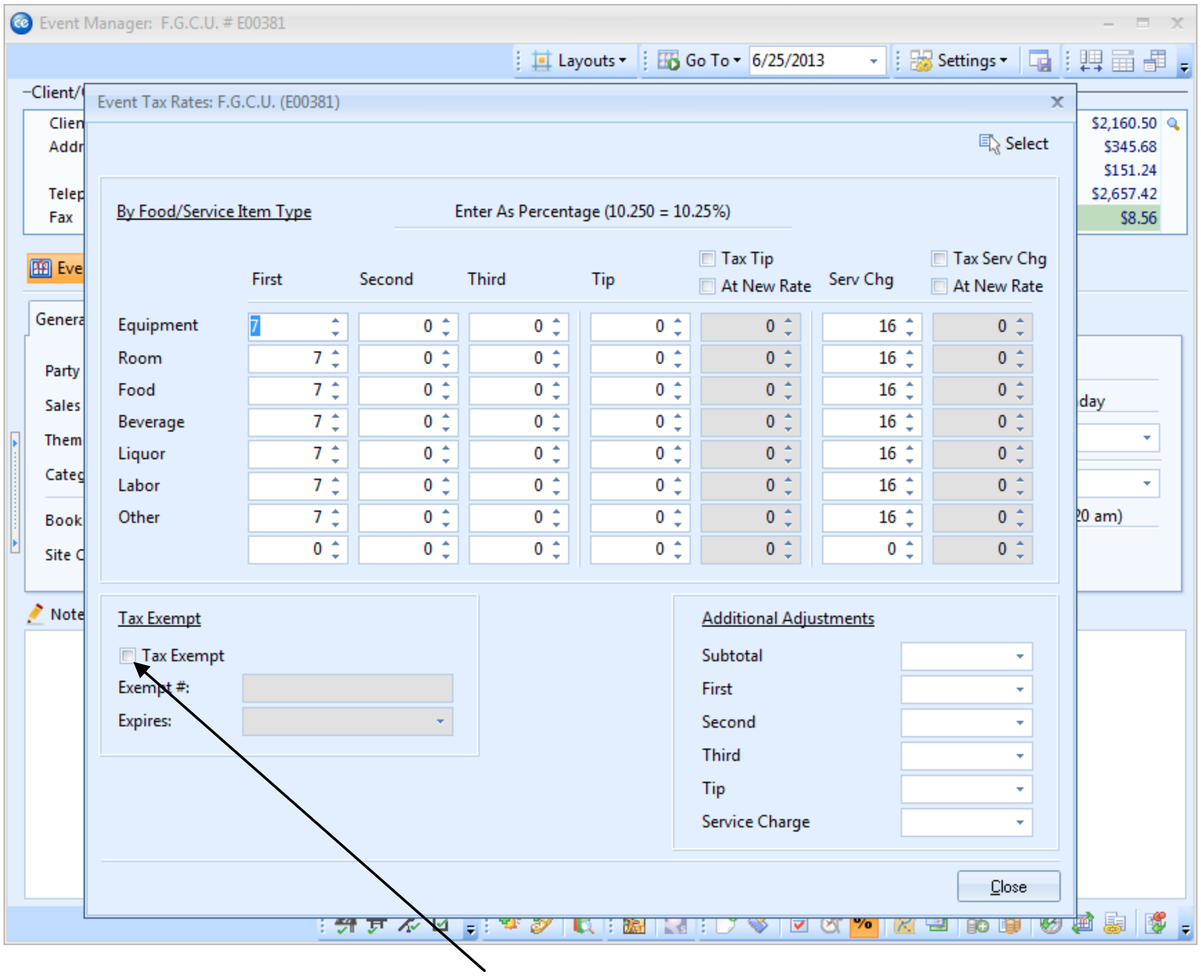
1. Click in the checkbox labeled Tax Exempt at the lower left of the form.
2. Click in the Exempt # field and enter an optional tax exempt ID number.
3. Enter an optional expiration date for the tax exemption.

Adding Additional Adjustments

1. Click in one of the fields at the lower right of the form.
2. Enter a dollar amount to be added to the subtotal, first, second, third tax, gratuity, or service charge of the order.

Retrieving an Optional Tax Schedule

1. Click the **Select Tax Schedule** button.
2. Select a schedule from the list.
3. Click the **OK** button.



Make an order Tax Exempt with one mouse click

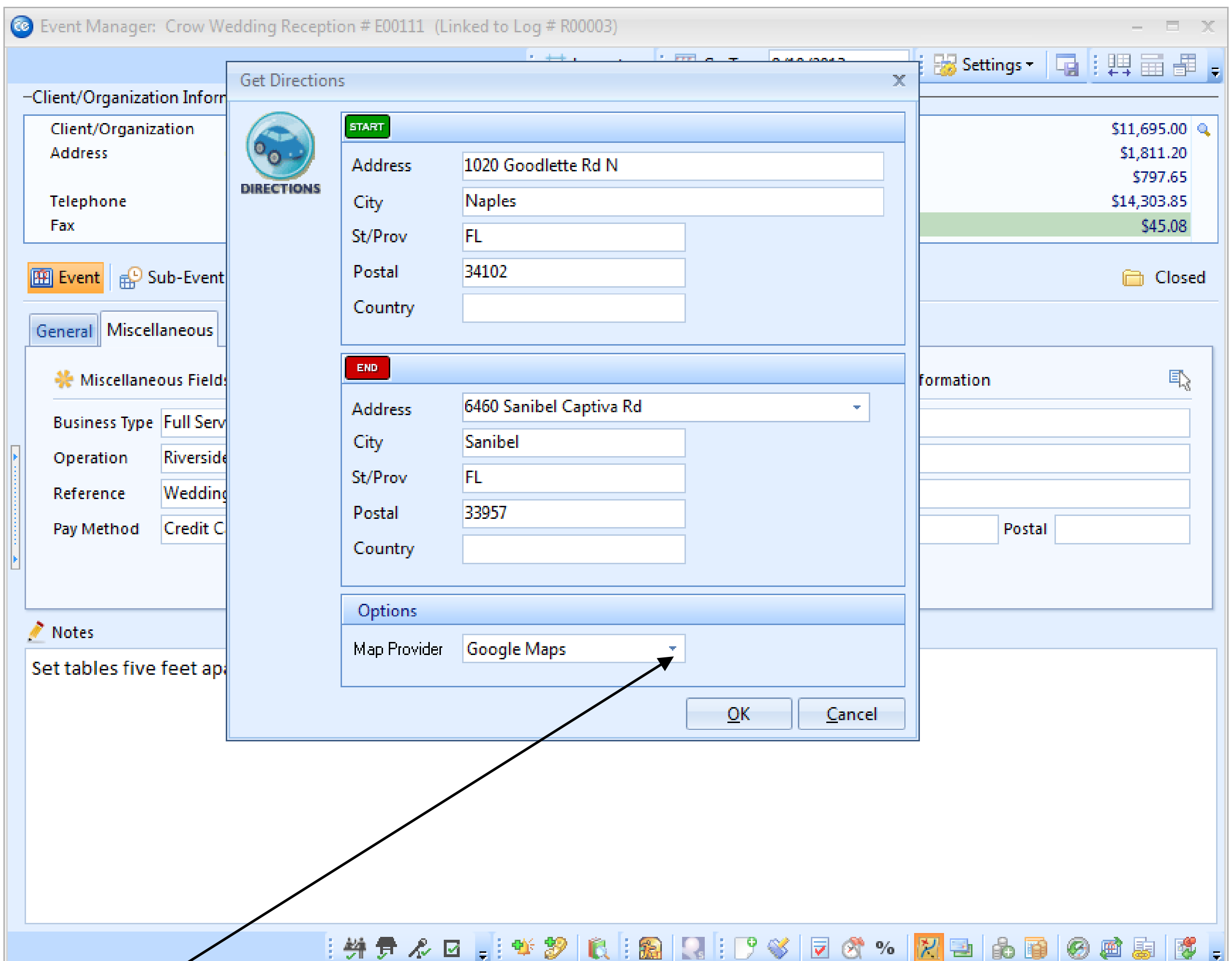
Getting Driving Directions

Can I quickly get up-to-date driving directions to the site location of an event?

Caterease has a dynamic interface with the leading mapping websites – MapQuest, Google Maps, and Virtual Earth – so you can simply click a button and get up-to-the-minute driving directions.

Using the Mapping Interface

1. Click the **Get Map** button on the toolbar at the bottom of the Event Manager window.
   Result: *The Get Directions window displays, with your company's address automatically filled in as the Start information, and your client's address as the End information.*
   Note: *If you have not filled in this account's address, city, state, etc., then the End information will be blank.*
2. Click the down arrow next to <u>Map Provider</u> in the <u>Options</u> section and choose your preferred mapping website.
3. Click **OK**.
   Result: *Your web browser will open on your chosen website showing directions to the client's address.*
   Note: *This interface only works if you have a connection to the Internet currently active on your computer.*



Click to select the map provider

Click to get directions

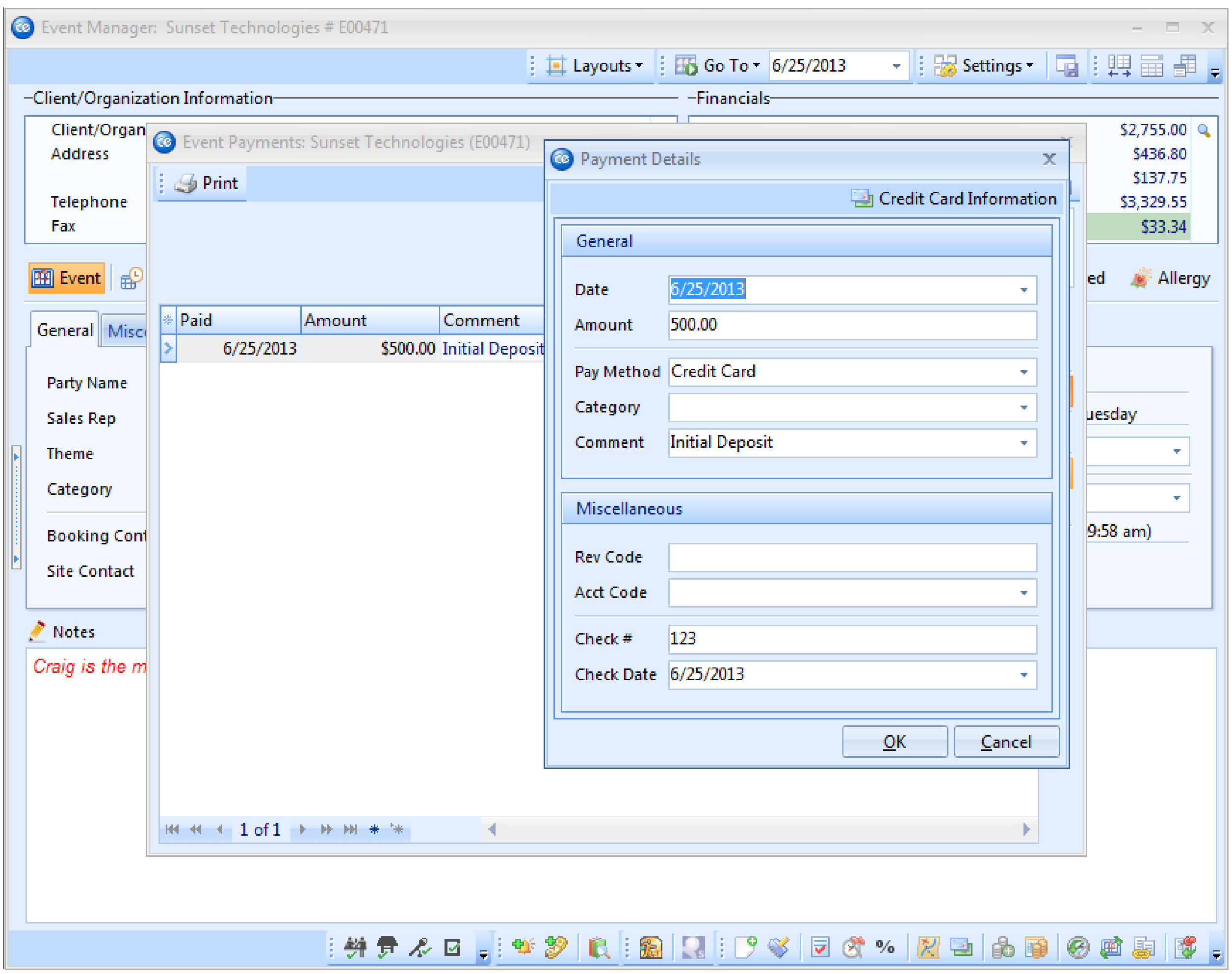
Posting Payments to an Event

Adding a Payment

1. Click the **Event Payments** button, located at the bottom of the Event Manager screen.
   Result: *The Event Payments window displays.*
2. Click the **Add Payment** button, located at the top of the Event Payments form.
3. Enter an Amount for the payment.
4. Enter additional information (Pay Method, Comment, Credit Card Information) as desired.
5. Click the **OK** button to close the Payment Details form.

Viewing or Editing Payment Details

1. Select any payment listed on the Event Payments form.
2. Click the **View/Edit Payment Details** button.
3. Edit the information as desired.
4. Click the **OK** button to close the Payment Details form.



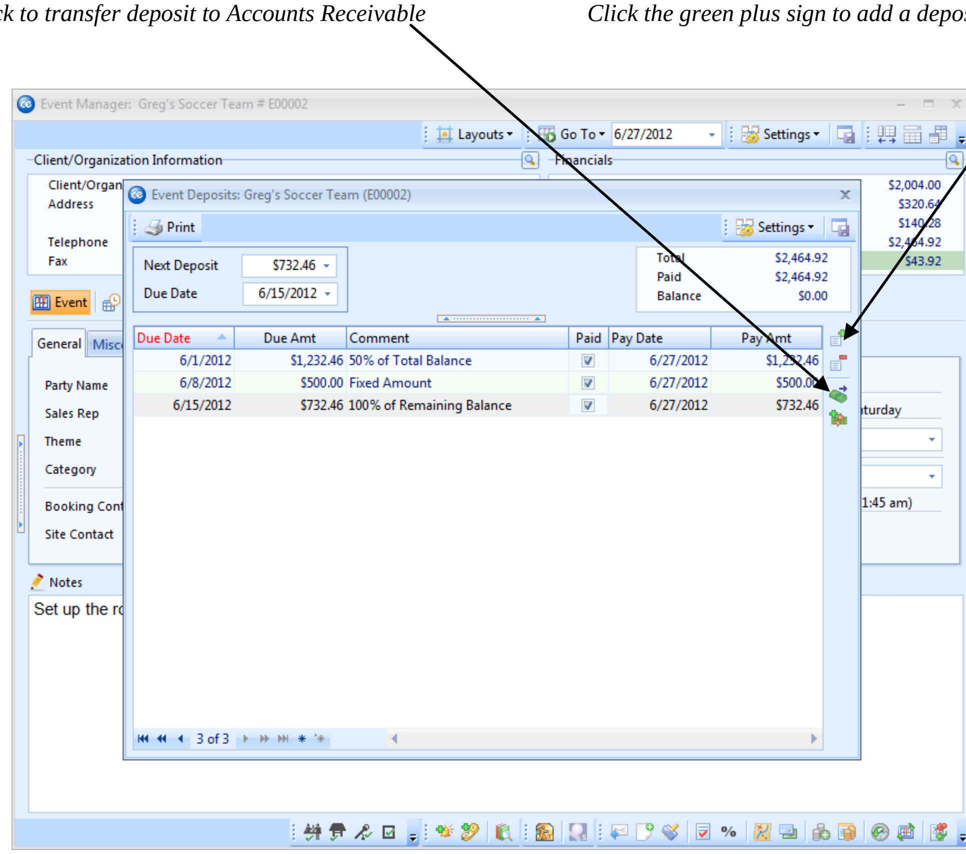
Scheduling Future Deposits for an Event

Can I set up a schedule of deposits the customer will pay in the future?
Yes! You have two options: You can either add as many future deposits as you need separately, entering due dates and amounts for each one, or you can create a default schedule of deposits and have Caterease automatically assign dates and amounts based on a custom set of rules you establish.

Scheduling Deposits Manually

1. In Event Manager, click on the **Event Deposits Due** button , located on the bottom right-hand side of the Event Manager display.
   Result: *The Event Deposits window opens.*
2. Click the **Add Deposit** button , located at the top of the Event Deposits form.
   Result: *A new, blank line is added to your deposits list.*
3. Click the down arrow at the right of the Due Date field and select a due date for the new deposit using the drop-down calendar.
   Note: *Of course, you can optionally type the date by hand.*
4. Press your **[Enter]** key.
   Result: *Your cursor moves to the next field - the Due Amount field.*
5. Enter an amount for the deposit, or click the down arrow to get help from the drop-down calculator.
6. Press **[Enter]** and enter a Comment, if desired.
   Note: *Examples of comments might include "Initial Deposit," "Final Payment," etc.*
7. Repeat Steps 2-6 to add other deposits as desired.
8. Click the **X** at the top right of the window when finished.
   Result: *A confirmation message appears.*
9. Click **Yes**.
   Result: *The Event Deposits window closes, saving your changes.*

Click to transfer deposit to Accounts Receivable *Click the green plus sign to add a deposit schedule*

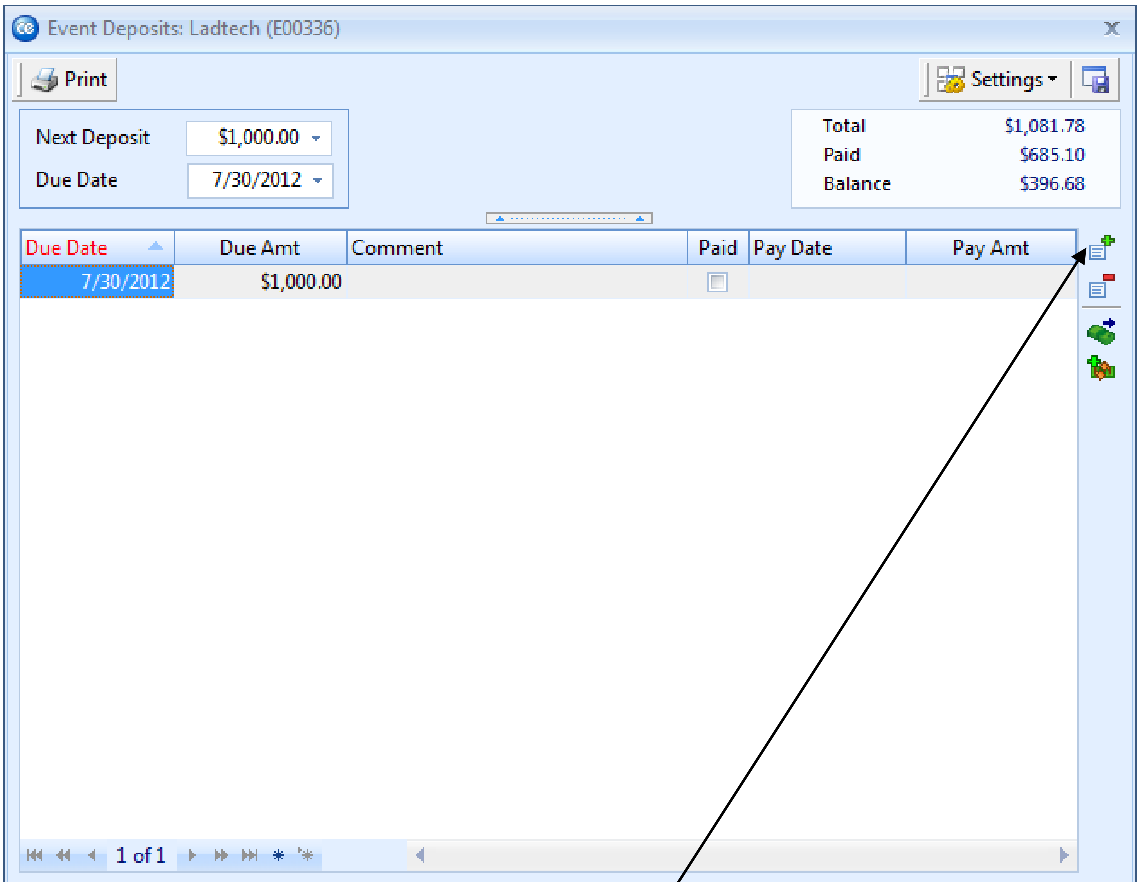


Adding Scheduled Deposits to an Event

The steps below describe how you can instantly create a detailed schedule of future deposits due for any event, based on the default schedule you created above.

1. In Event Manager, click on the **Event Deposits Due** button, located at the bottom right of the Event Manager display.
   Result: *The Event Deposits window appears.*

2. Click the **Make Scheduled Deposits** button at the top of the Event Deposits window.
   Result: *A list of deposits is created, based on the deposits schedule you have created in your program.*



Click to add new deposit schedule

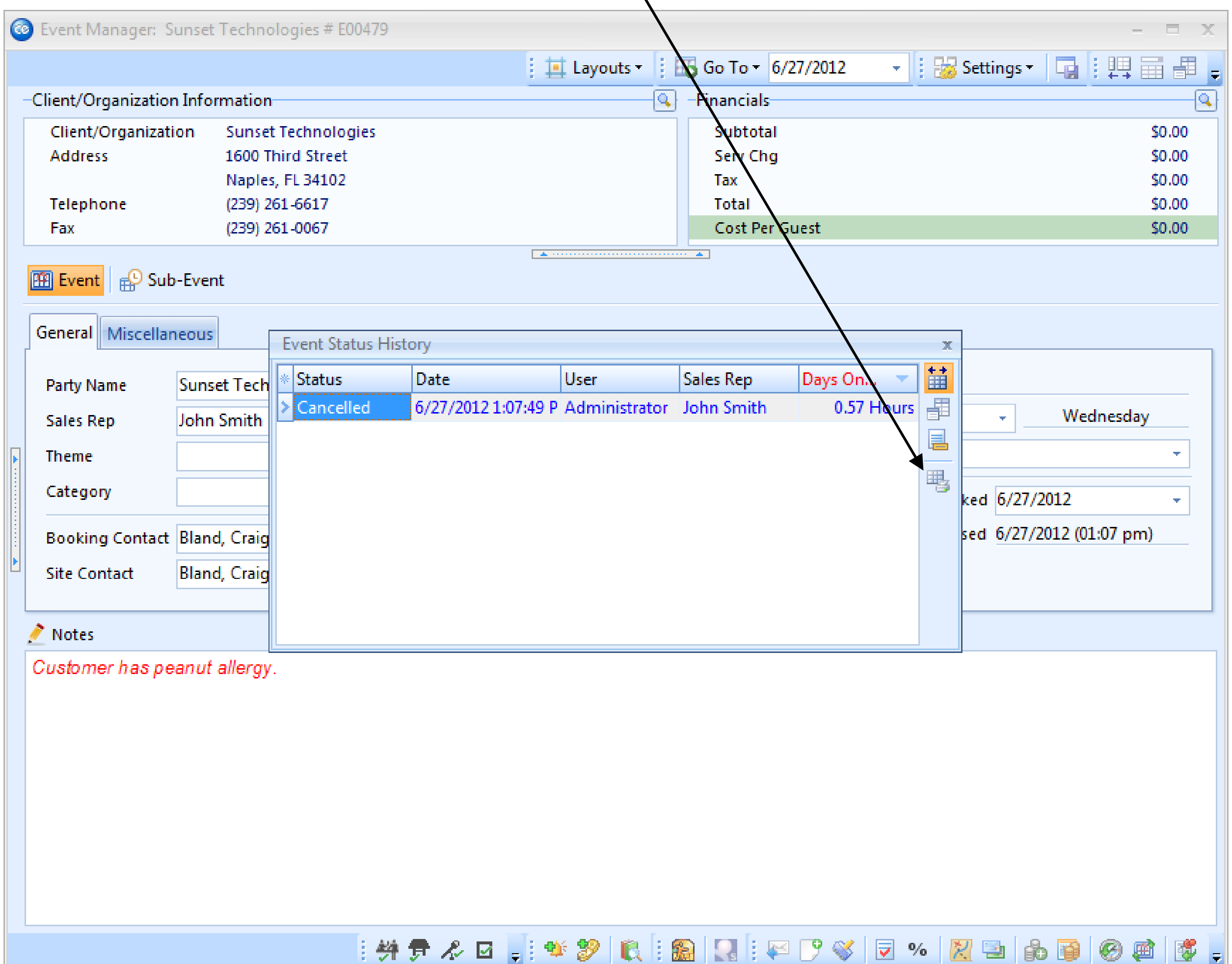
Checking Event Status History

Can I track how long an event has been Tentative, Prospective, etc.?
Quickly track the lifecycle of an event using the handy Event Status History tool. This feature shows specifically how much time an event has spent at each level of your sales process (from Prospective, to Tentative, to Definite) or any custom status in-between.

Checking the Status History of an Event

1. Open an event in Event Manager.
2. Click the **Event Status History** button from the toolbar at the bottom of the Event Manager screen.
3. **[Optional]** Click the **Print Grid** button to print the grid.

Print Grid *button*



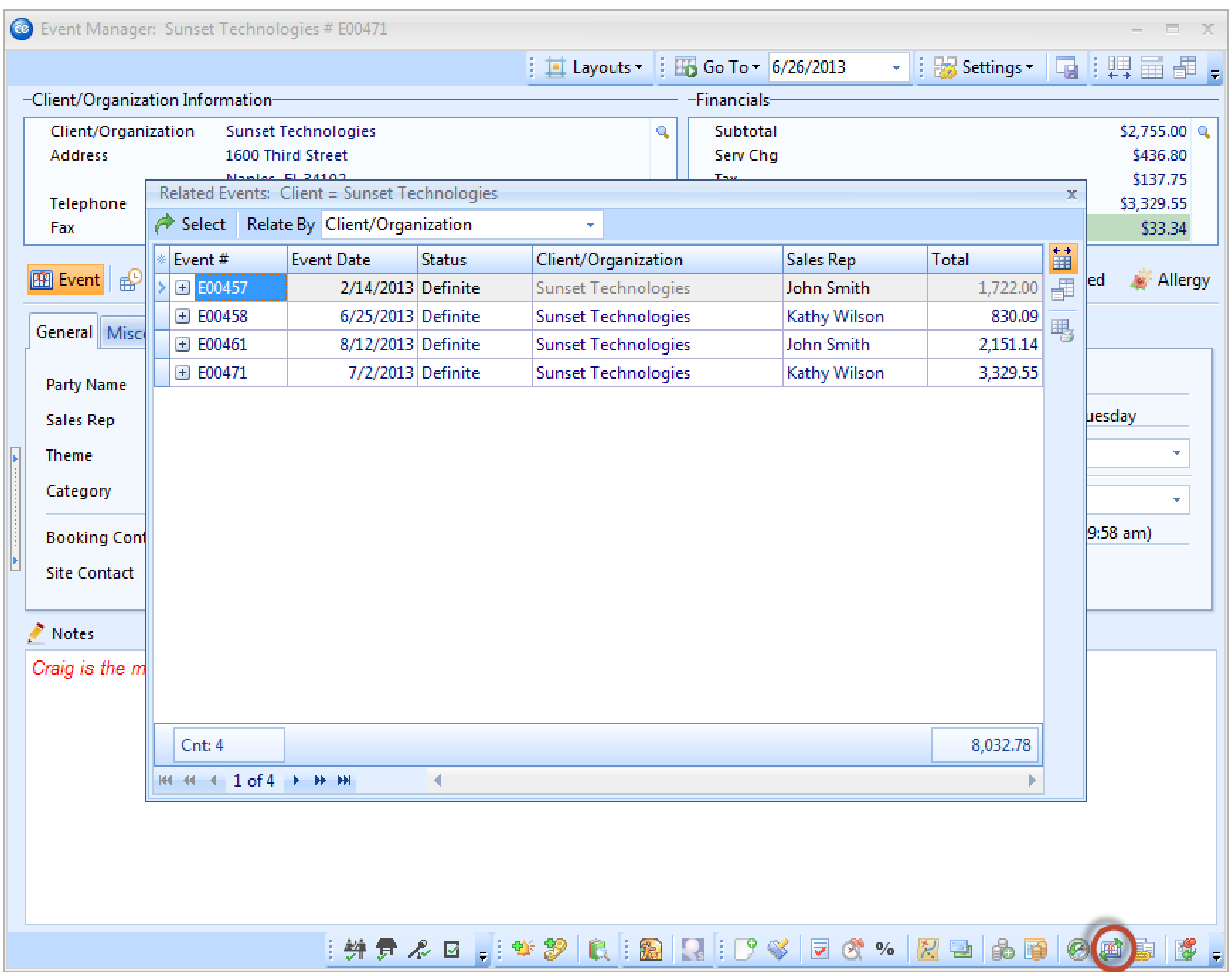
Event Status History *button*

Viewing Related Events

How do I find other events like this one?
The Related Events tool – available only in the Professional version of Caterease, is an excellent way to quickly navigate through your events. Find parties related to each other, based on client name, sales rep, theme, or a variety of other options, and jump to them instantly, or even open them in a separate Event Manager!

Using the Related Events Tool

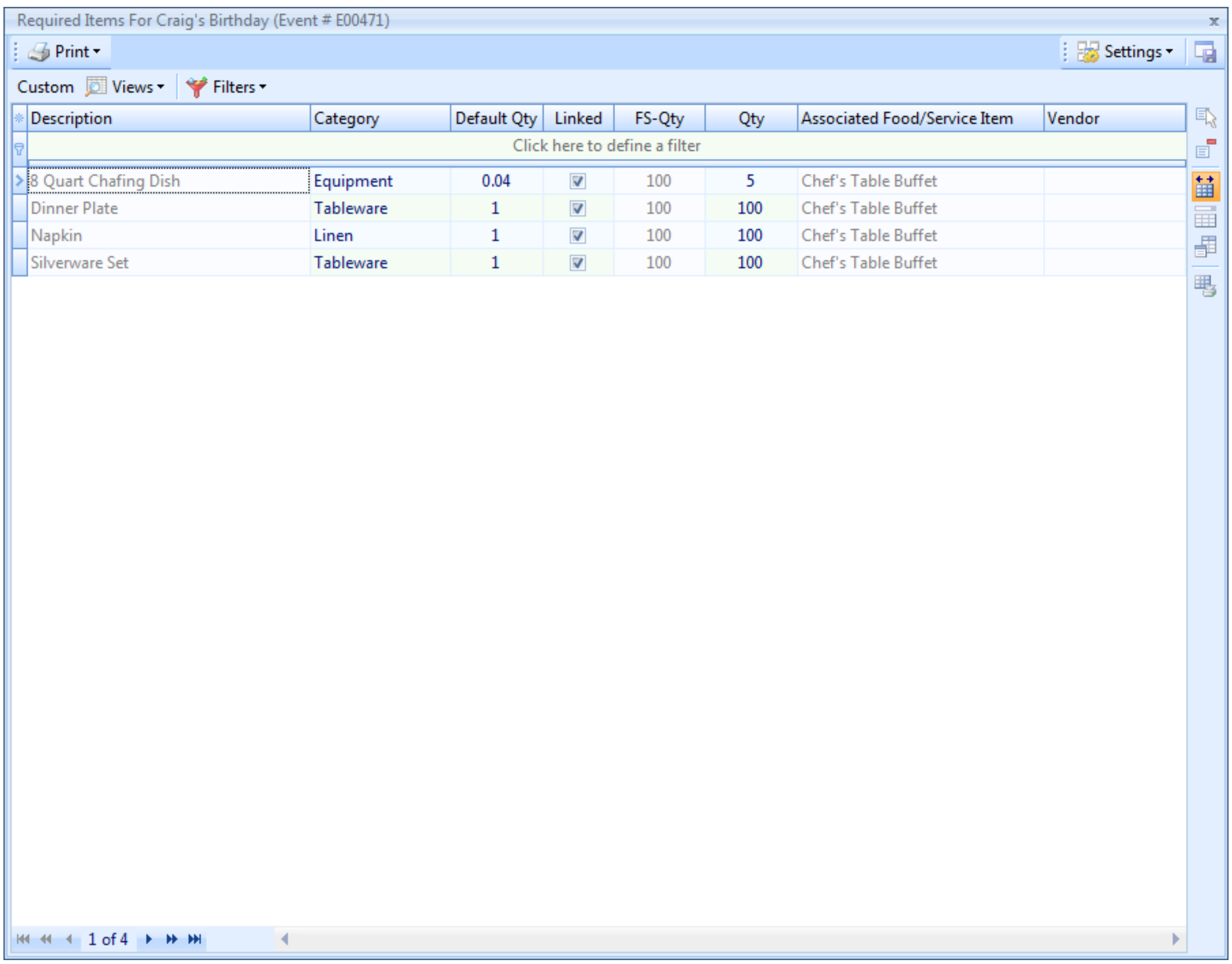
1. Open an event in Event Manager.
2. Click the **Related Events** button  in the toolbar at the bottom of Event Manager.
   Note*: You may also click* ***Select*** *>* ***General*** *>* ***Related Events****.*
   Results: *A pop-up window appears, listing all events related to this one by a certain detail.*
3. **[Optional]** Click the down arrow next to Relate By and choose to see events related by a different detail.
   Note: *This window retains its settings, and thus shows the last detail you chose in the Relate By field.*
4. **[Optional]** Float your mouse over any column heading and click the down arrow at the right of the column heading to filter events. (e.g., filter Event Date to show only related events for "This Week").
   Note: *This window retains its settings, and thus shows the last filter you used.*
5. **[Optional]** Open a related event in any of the following ways:
   - Double-click an event.
   - Select an event and click the **Select** button at the top left of the window.
   - Right-click an event and opt to open it in the current Event Manager or a second Event Manager.



Using Required Items

What is a Required Items List?
A Required Items List is a compilation of items that are to be included when you order a particular menu item. Setting up a Required Items List allows you to create a checklist of items that must accompany specific bookings.

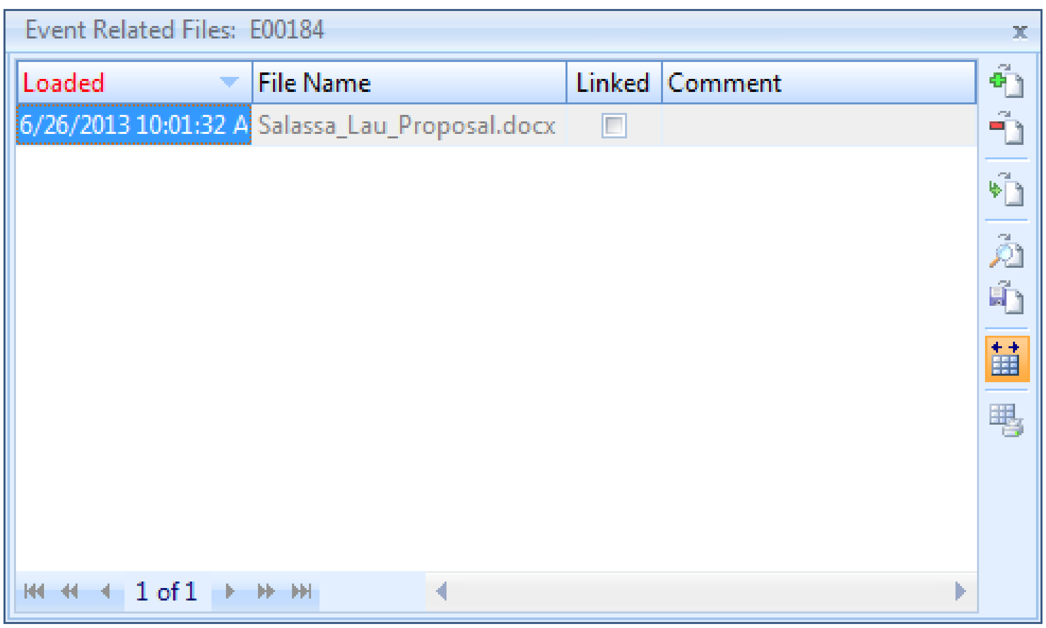
1. Click the **Required Items** button in the toolbar at the bottom of Event Manager.
2. Click the **Select Items** button , located on the upper right-hand side of the window.
3. Click a title in the left-hand pane to choose a specific list of required items.
4. Retrieve items in any of the following ways:
   - Double-click a single item to retrieve it.
   - Drag your mouse over several items to select them all, or hold the [**Shift**] or [**Ctrl**] key down on your keyboard as you click.
   - Drag and drop highlighted items from the Select Items window.
   - Click the **Drop Items** button at the top left-hand side of the window to retrieve the currently highlighted item(s) and leave the window open.
5. Click the **OK** button at the bottom right-hand side of the window to retrieve the currently highlighted item(s) and close the window.
6. [**Optional**] Click the **Quick Column Customizing** button and choose to display additional columns.



Using Event-Related Files

Am I able to associate contracts, prints, proposals, etc., with a particular event?
If you have any computer files (Word documents, Excel spreadsheets, PDF's, images), that are somehow related to an event, you can associate those files to the party in Event Manager. For example, perhaps you want to maintain a copy of each updated contract on record, in order to compare changes over time. Or maybe you want to create a diagram of the party in an image software program and then attach that image as a JPG or BMP file. You can choose to embed a copy of each file into the Caterease database or, if you plan to make future changes to the file, you can establish a link to the file itself.

1. Click the **Event-Related Files** button , located at the bottom right-hand side of the Event Manager window.
2. Click the **Add File** button  on the right-hand side of the Event-Related Files window.
3. Choose to embed the existing file into the database or establish a link to the existing file.
   Note: *Embedding the file into the database copies the file in its current form and attaches it to the event, whereas establishing a link to a file will connect this event to a file on your computer or network that you may save over time. (When establishing a link to a file that is not saved on your computer, you will only be able to review that file when your computer has access to it.)*
4. Click **Yes** to confirm your choice.
   Result: *The Attach File window opens.*
5. Browse to the desired file and double-click. Alternatively, you may locate the document from the File name drop-down list and click **Open**.
   Result: *The document name displays in the Event Related Files window.*
6. Click the **Save Attached File** button to save the file to the event.
7. [**Optional**] Enter a Comment to describe the file or its relationship to the event.



Applying Event Discount Rates

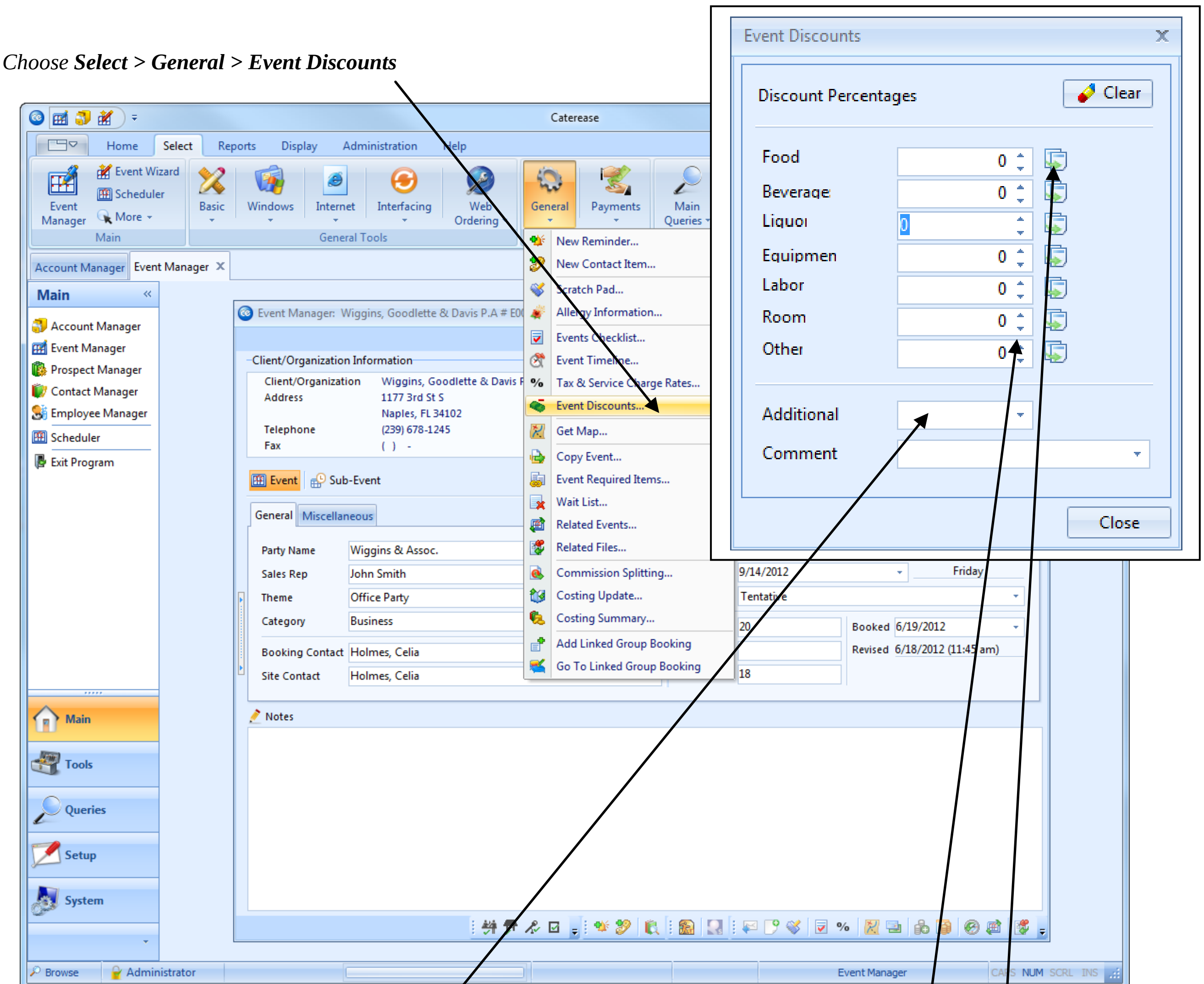
What are discount rates?

Discount rates are a means for you to discount an event by a certain percentage of the menu prices. You can break a discount into different rates for each menu item type: Food, Beverages, Liquor, etc.

Applying Discounts

1. In Event Manager, click the **Select** ribbon tab and click the **General** button.
2. Select **Event Discounts**.
3. Click in any field and enter a discount rate, either by typing into the field or using the up and down arrows to raise or lower the rate one percentage point, respectively.
4. Press your **[Enter]** key to move from field to field.
5. Repeat for any menu item type.
6. Click **Close** when finished.

*Choose **Select** > **General** > **Event Discounts***



*Optionally, add a flat-rate discount amount into the **Additional** field.*

Type discount rates, or use arrows to set

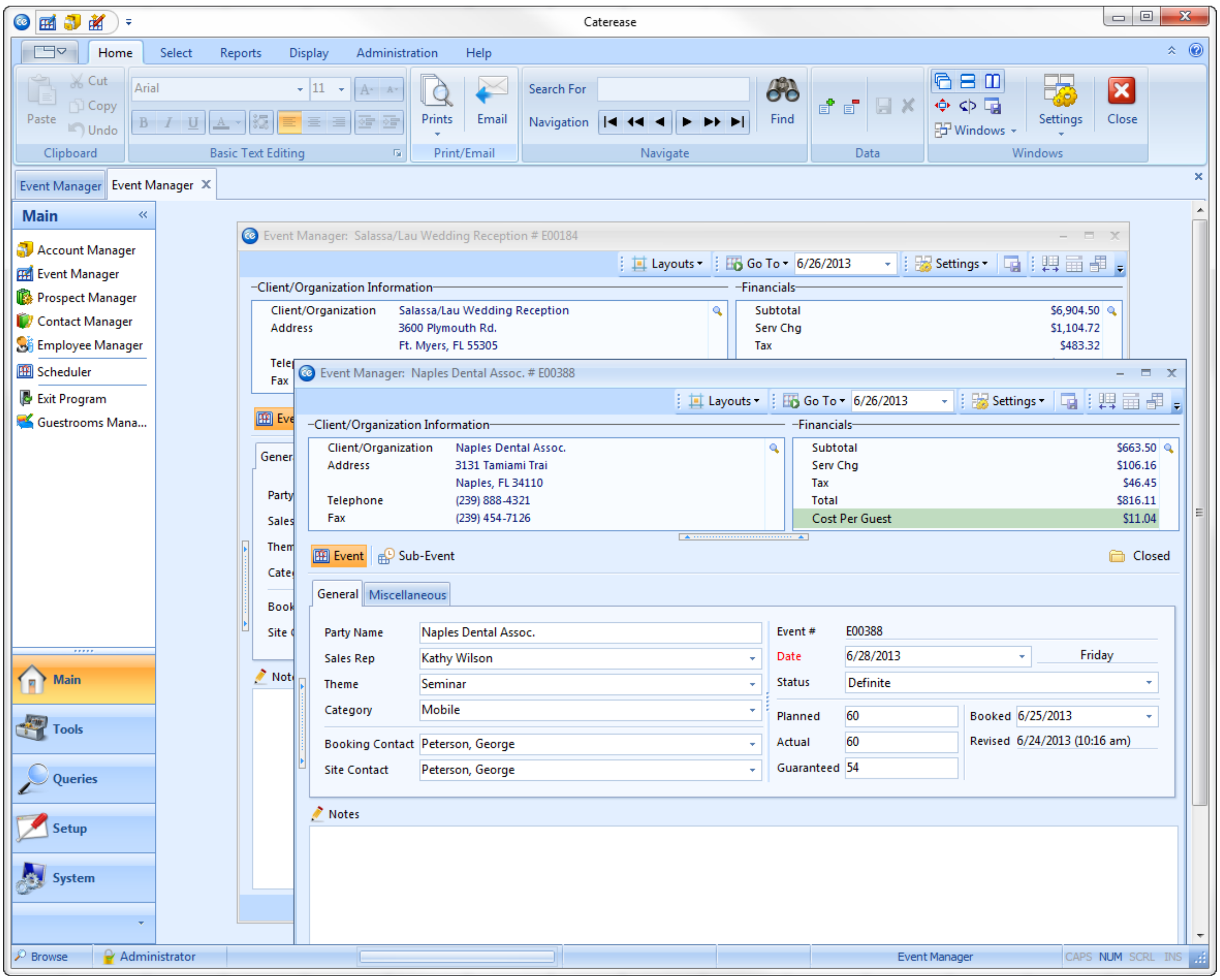
*Click the **Copy** button to copy amounts*

Managing Multiple Events Simultaneously

What if I get interrupted when I'm working on an event?
Then handle the interruption, without ever closing the event! Caterease lets you open multiple windows – including multiple Event Managers – simultaneously, so you can handle any interruption without losing your place!

Opening Multiple Managers

1. With one Event Manager (or other Manager) open, click the **Event Manager** button (or other Manager button) on the **Main** sidebar.
2. Click **Yes** to confirm your choice.
3. Work as desired in the new Manager.
4. Close the second Manager to return to your previous Manager (or toggle between the two).



Copying an Event (*See image on following page*)

What does Copy Event actually do?
When you copy an event, it takes all details of that event (with the exception, of course, of payment information) and copies them to another date or dates. If a customer wants to repeat an event - or even make the event weekly, monthly, etc. - it can be accomplished in just a couple of mouse clicks.

Copying an Event to Specific Dates

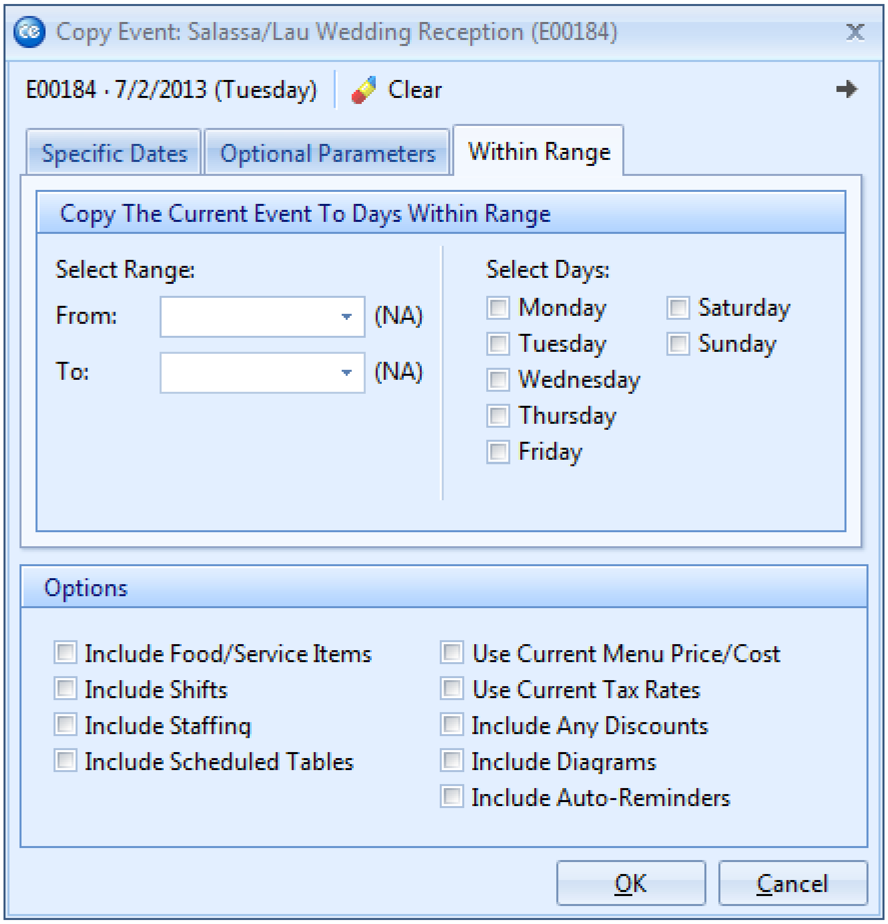
1. In Event Manager, select the **Select** tab then the **General** icon  and then choose **Copy Event**.
2. Enter a date into the first field on the **Specific Dates** tab, or click the down arrow to get assistance from the drop-down calendar.
3. Enter more dates as desired.
4. At the bottom left of the Copy Event form, click any of the various checkboxes if you wish to include food/service items, staffing, auto-reminders or room diagrams in your copy, or if you want to use updated menu prices and costs.
5. Click **OK**.

Copying an Event for Regular Intervals (*Not Available in the Express Version)*

1. Click the **Optional Parameters** tab.
2. Click the down arrow next to the Sequence field.
3. Choose a sequence for the copy.
4. Select a Beginning Date or day on which the copy should begin.
5. Enter the number of copies needed into the Number Of Copies field.
6. At the bottom left of the Copy Event form, click any of the various checkboxes if you wish to include food/service items, staffing, auto-reminders or room diagrams in your copy, or if you want to use updated menu prices and costs.
7. Click **OK**.

Copying an Event for Specific Days Within a Range *(Not Available in the Express Version)*

1. Click the **Within Range** tab.
2. Click the checkbox(es) next to the specific day(s) you want your new events to occur on.
3. Enter a start date in the From field under Select Range.
4. Enter an end date in the To field under Select Range.
5. Select Days by clicking into the corresponding check boxes.
6. At the bottom left of the Copy Event form, click any of the various checkboxes if you wish to include food/service items, staffing, auto-reminders or room diagrams in your copy, or if you want to use updated menu prices and costs.
7. Click **OK**.


Copy Event: Salassa/Lau Wedding Reception (E00184)
E00184 - 7/2/2013 (Tuesday)
Clear
Specific Dates
Optional Parameters
Within Range
Copy The Current Event To Days Within Range
Select Range:
From:
(NA)
To:
(NA)
Select Days:
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Options
Include Food/Service Items
Include Shifts
Include Staffing
Include Scheduled Tables
Use Current Menu Price/Cost
Use Current Tax Rates
Include Any Discounts
Include Diagrams
Include Auto-Reminders
OK
Cancel

Switching/Editing Account Information for an Event

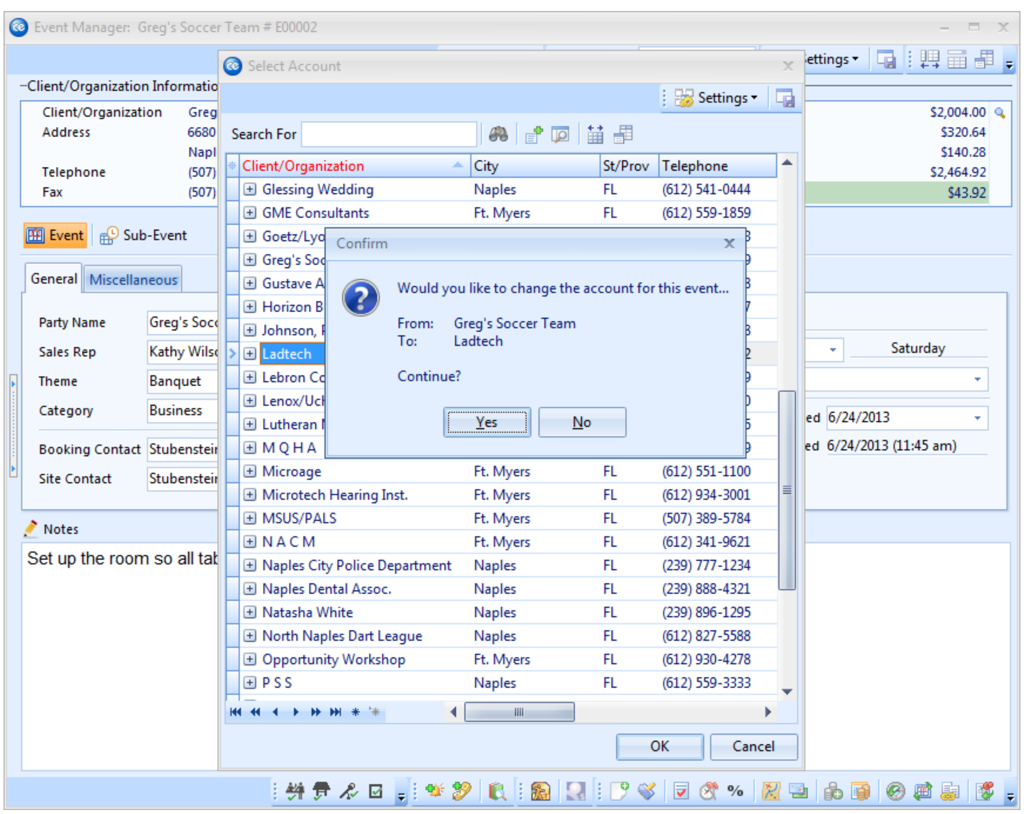
Why would I want to change the account information?
There are two different concepts here: editing information for the existing account and switching the account altogether. It is extremely important to distinguish between the two. For example, imagine a client calls to tell you their area code has changed, so you need to update it in your records. This is an example of editing information for the existing client of an event. However, imagine a client tells you they want to hold the same exact event with you that their colleague held last year. First you would copy the original event, and then change the account from the colleague's name to the one who just called you on the phone. This is not editing existing account information; instead, it is changing or switching accounts completely.

Editing Information for an Existing Account

1. Click the **Additional Client Information** button to the right of the Client name on your Event Manager screen.
2. Click the **Show Details** button at the top of the Select Account window.
3. Click the **Account Locked** button.
4. **<u>READ THE MESSAGE CAREFULLY.</u>** Confirm that you want to edit the account information, not only for this event but for *every other event this account has ever booked with you*.
5. Edit as desired.
6. Click **OK** when finished.

Switching Accounts Entirely

1. From the Select Account window, click the **Account Information** button.
2. Search for a different account using the **Search Records** or **Incremental Search** tool OR click the **Add New Account** button to add a new account.
3. When finished, click **OK**.
4. Click **Yes** to confirm.



SECTION 3: Tracking Data

Unit 16: Tracking Current Events

Topics covered in this unit include:

Running a Current Events Query
Customizing the Results Grid
Sorting/Grouping Data
Saving the Grid View
Creating/Saving Filters
Printing/Exporting Data
Generating Batch Prints
Batch Emailing
EZ Chart View
Using the Client Contacts Query
Using the Accounts Receivable Query and Accounts Receivable Report

Running a Current Events Query

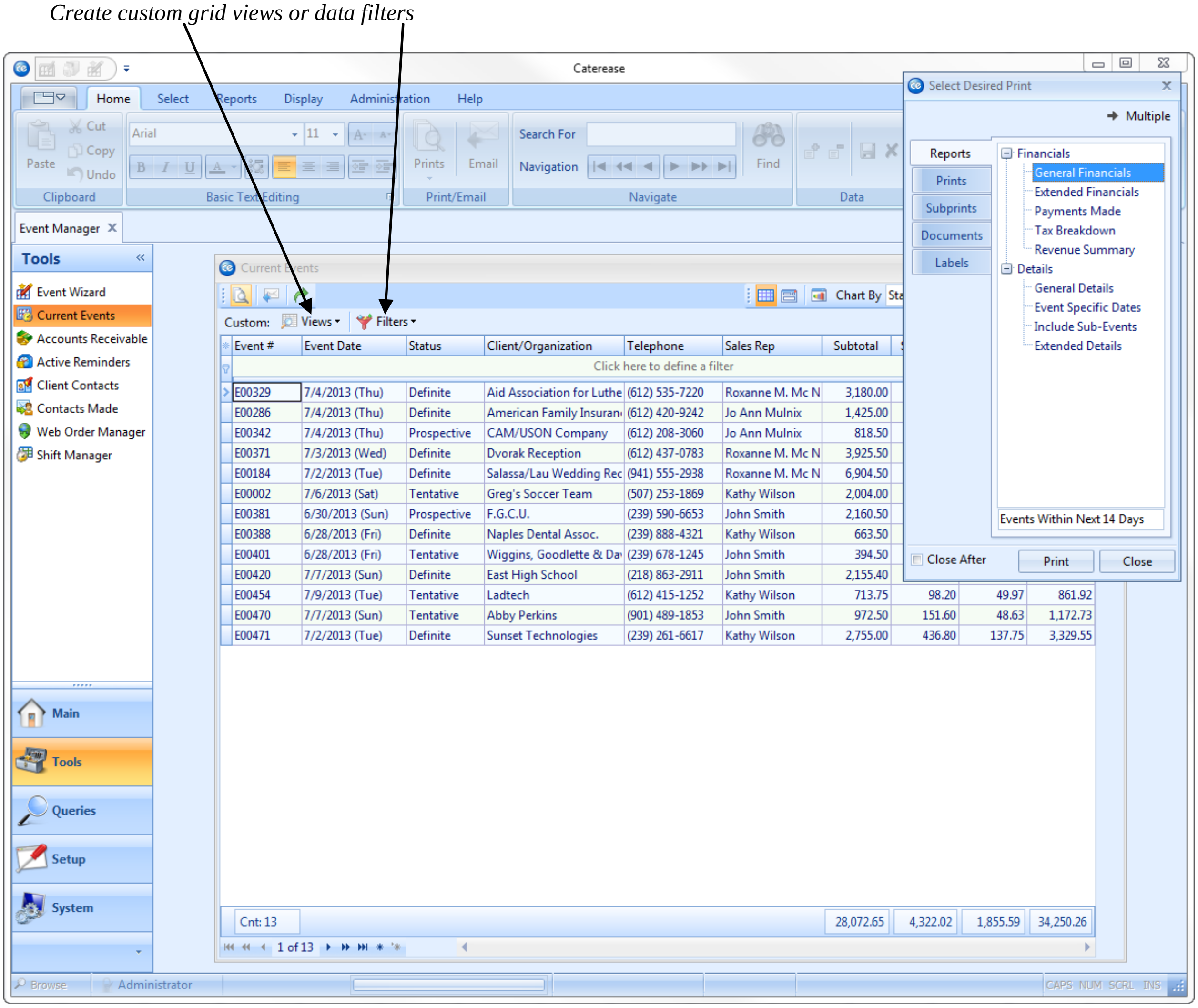
What does this tool do?

This powerful tool will quickly query your entire database, and find all events within a particular date range. From the results screen, you can select one, several, or all events listed and print reports, contracts, letters, and other prints. You can even completely manipulate the results screens (since they are both grids) – adding, removing and rearranging columns, sorting and grouping data – and then exporting the details.

Running a Current Events Query

1. Click the **Tools** sidebar on the left side of Caterease.
2. Click the button labeled **Current Events**.
3. Click the down arrow under Days Out, and set a date range for your query.
4. Click under Options to suppress events with a status of Closed, Cancelled, Tentative, Definite, or Prospective.
5. Click **OK**.

Create custom grid views or data filters



Customizing the Grid

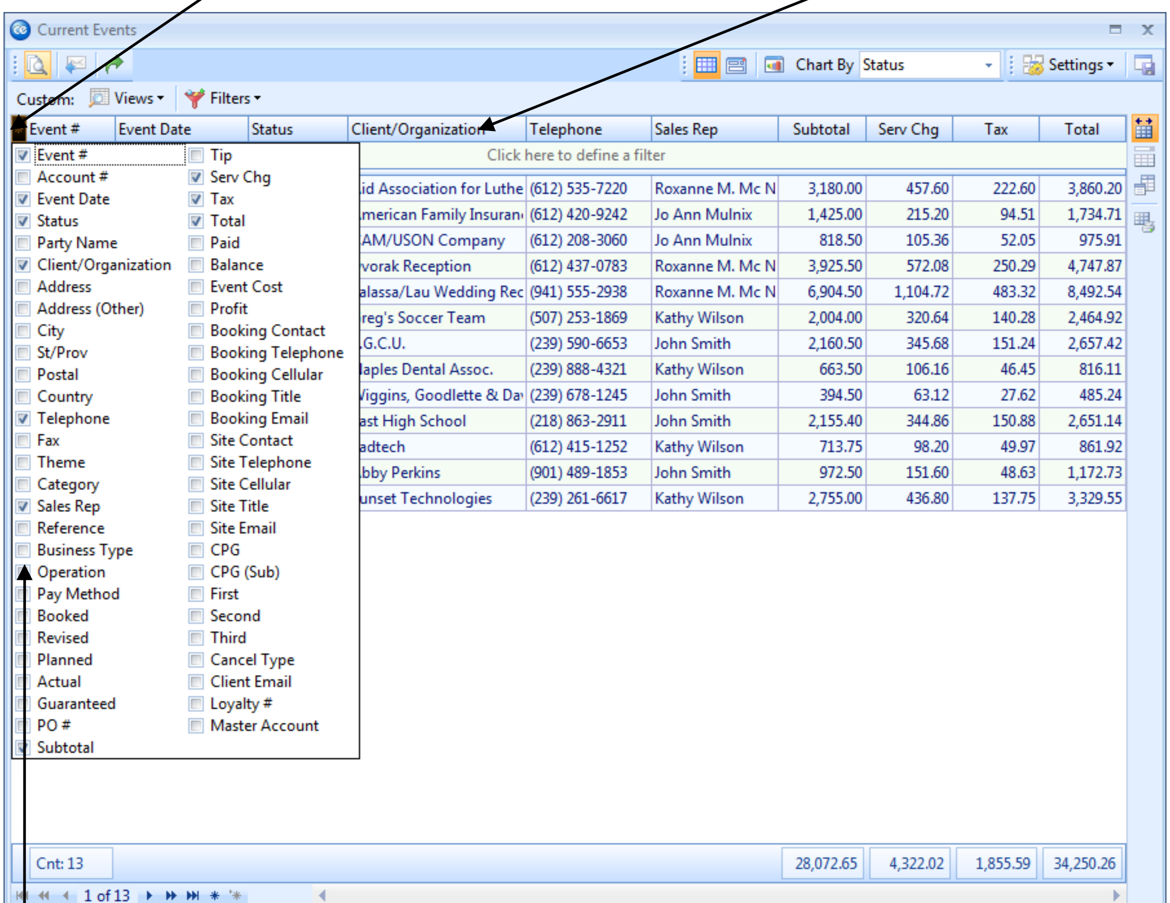
Can I control what I see in this grid?

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

1. Click the **Quick Column Customizing** button, located at the top left of the detail grid (to the left of the first column heading).
   Result: *A drop-down list of column headings appears.*
2. Click the checkbox next to any optional field name.
   Result: *Fields that are checked off will appear as columns in the grid.*
3. **[Optional]** Hold your left mouse button down on that column name in the list and drag up or down to reposition it on the grid.
   Result: *The column heading is moved to a new position in the grid.*
4. **[Optional]** Click to remove the check next to any column heading in the list to remove that column from the grid.
5. **[Optional]** Click the **Save Window Settings** button at the top of the window if you want this to be the new default arrangement for this detail grid, or choose to save this as a custom grid view (see following pages) for instant access later.
   Result: *A confirmation message will appear; click **Yes** and your new arrangement will be saved as the new default look for this grid.*

*Click the **Quick Column Customizing** button to access display fields*

OR click on a column heading and drag/drop into position



Click in the checkbox to display or remove columns OR drag and drop to the desired location

*S*orting and Grouping Grid Data (See Image on next page)

What if I want to rearrange the data I'm looking at?
Another powerful option in Caterease detail grids is the ability to separate data in to groups based on any grid detail. For example, maybe you would like to see the financial information for all of this month's parties grouped by sales representative — complete with financial subtotals for each group. You can even group within groups — seeing, for example, events grouped by sales representative and then perhaps grouped by status within each sales rep's group.

Sorting Grid Data

1. Click the heading of a column you wish to sort by.
   Result: *The records are sorted in ascending order by that column.*
2. **[Optional]** Click the same column heading again to sort in descending order by that column.
3. **[Optional]** Hold the **[Shift]** key down on your keyboard and click the heading of another column.
   Result: *Records are now sorted by this second column within the first column you selected.*
   Note: *Available in the Professional version only*.

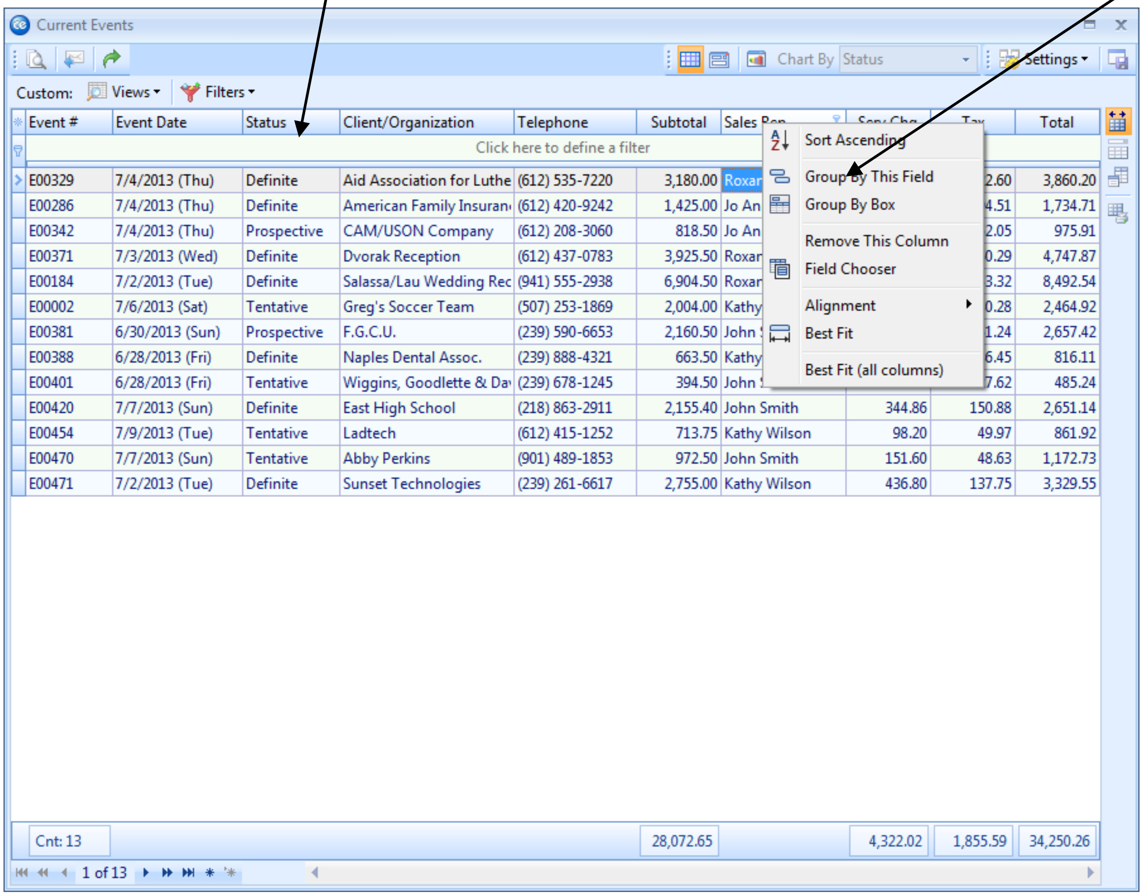
Grouping Data

1. Click your right mouse button on the heading of any column in the grid.
   Result: *A pop-up menu appears.*
   Note: *You must click on the heading of a column; clicking within a column presents a different pop-up menu.*
2. Select **Group By this Field**.
   Result: *A small panel containing your chosen column heading is displayed across the top of the detail grid, and grid data is now separated into groups based on your selection.*
3. Repeat Step 2 to create sub-groups, or groups within groups (*Professional version only*).
   Note: *For example, you could choose to group all events by Theme, and then by Sales Rep within Theme (sub-groups).*
4. Click the plus sign to the left of each group in the grid to display the records in that group.

Removing Groups

1. Click your right mouse button over any column heading in the group panel (the small panel along the top of the results grid.)
   Note: *Each heading must be done individually.*
2. Select **Remove From Grouping**.
   Result: *The records are no longer grouped by that heading.*
3. Repeat for any other group headings (if necessary).
4. Click the **Group By Box** button, located at the top right of the grid, to close the group panel.
   Result: *The small panel at the top of the grid disappears.*

Click a column to sort data by column header *Right mouse click and select* ***Group By This Field***



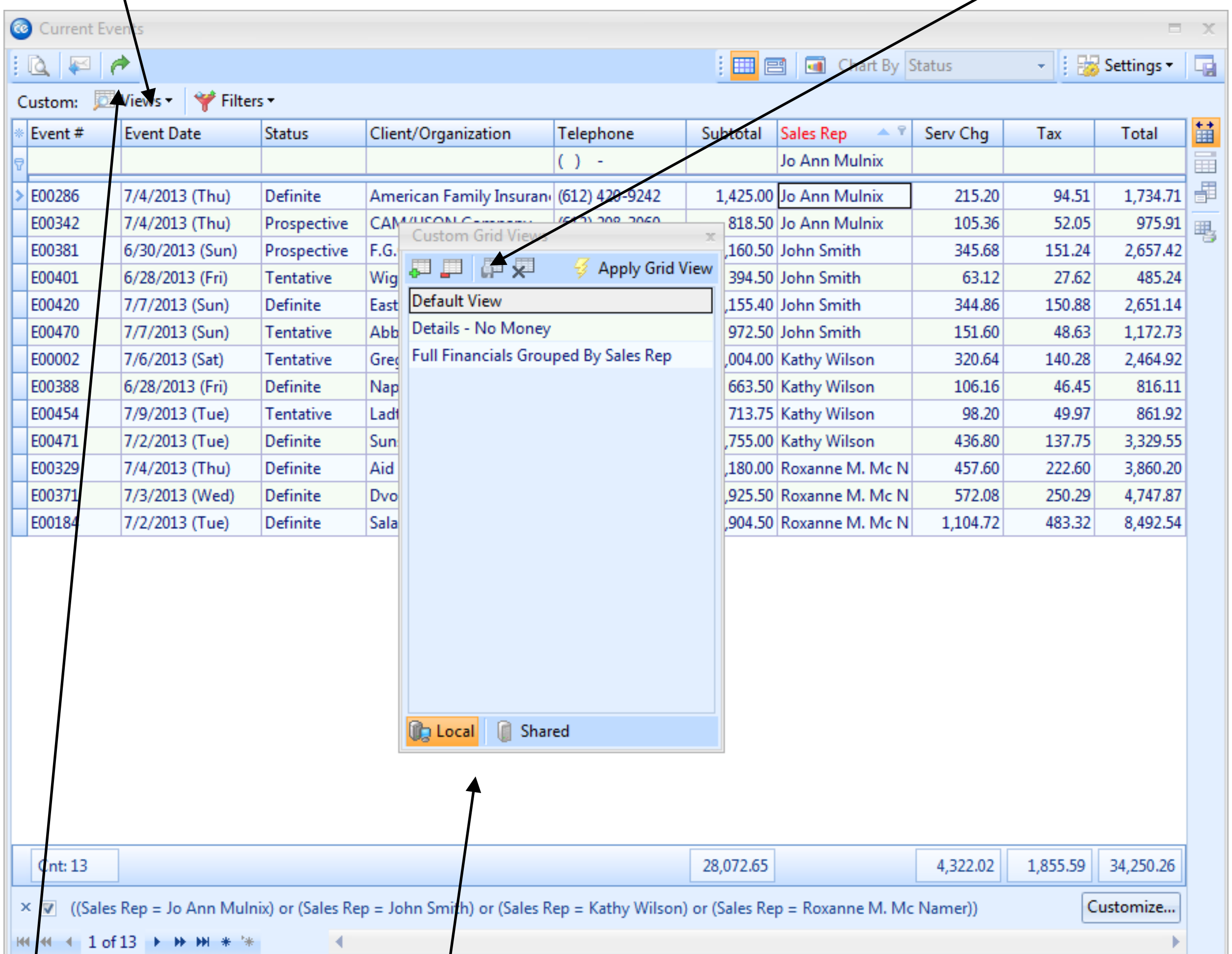
Saving the Grid View

What if I have several different grid layouts I need?
Once you create a custom grid display, you can save that view for future use. Perhaps every month you're going to want to look at your financial information grouped by sales representative. Create this view once, then save it to be pulled up every month, with just the click of a button. Views can be saved locally (meaning they will only be available on your machine) or shared across all Caterease users on the network.

1. Establish a custom grid view as outlined previously.
2. Click the **Views** button at the top left of the results grid display.
3. Choose **Custom**.
   Result: *The Custom Grid Views window appears.*
4. **[Optional]** Click the **Shared** button at the bottom of the Custom Grid Views window if you want this custom view to be shared with other users on your Caterease network.
   Note: *The **Local** button is selected as a default; all local grid views will only be available on your computer.*
5. Click the **Add Grid View** button .
6. Type a name for your new grid view.
7. Click the **Save Current Grid View** button .
8. Close the Custom Grid Views window.

*Click **Custom,** under Views, to add a new view, or open a saved view*

Save the grid view



*Click **Views** to access saved views*

Save the grid view locally (Local) or on the server (Shared)

Creating the Grid Filter (See image on following page)

What if I don't want to see all the records that are listed in the grid?
That's what grid filters are all about: filtering data! For example, perhaps you only want to look at events for a particular sales representative. Or maybe you only want to see parties with a particular status. Use the steps described below to filter out those records that you don't want to see.

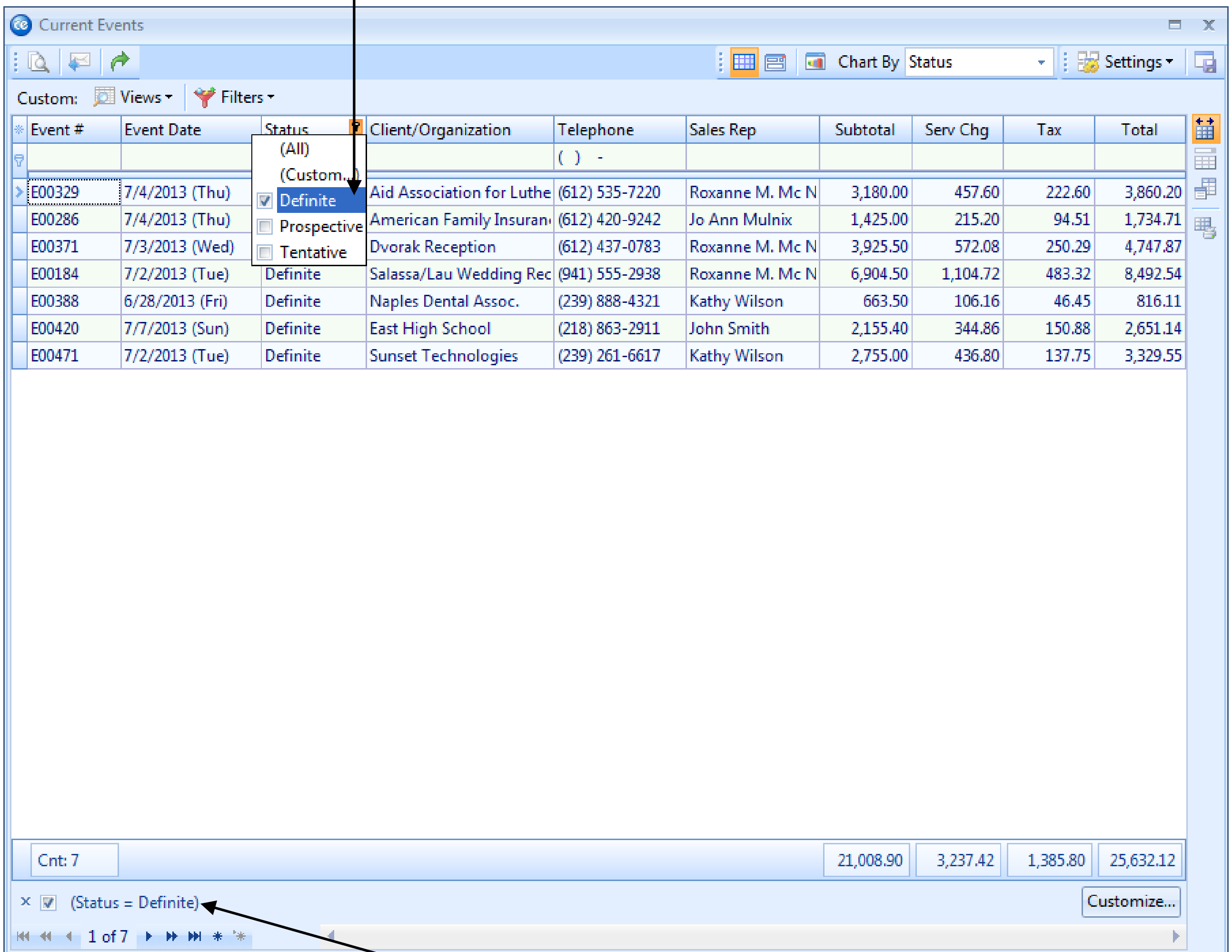
Establishing a Filter

1. Float your mouse pointer over a column heading in the grid to reveal a black down arrow at the right of the column heading.
2. Click the down arrow at the right of a particular column heading - for example, the column heading labeled "Status."
   Result: *A drop-down list appears, listing all options available for that column. In our example of "Status," the drop-down list might include the options of "Definite," "Tentative," "Prospective," etc.*
3. Select an option from the corresponding list.
   Result: *A filter is instantly created, filtering out all records that do not match that selection. As an option, you can click the checkbox next to several options in the list to filter by multiple details.*
   Note: *The details of your filter are indicated in the lower left-hand corner of the grid. Changes made to a filter are automatically stored in temporary memory as long as this screen remains open, and can be retrieved as detailed below.*
4. Repeat Steps 1-3 as desired to further filter data.
   Result: *The filter updates to reflect your changes.*

Establishing a Custom Filter

1. Click the filter icon at the right of a particular column heading - for example, the column heading labeled "Status."
   Result: *A drop-down list appears.*
2. Select **Custom**.
   Result: *The Custom Filter window appears.*
3. Establish your first filter condition - for example, choose "Equals" as your comparison by clicking the down arrow on the left side of the window and "Definite" as the status to the right.
   Note: *The example outlined above would be intended to filter out all events that do not have a status of "Definite."*
4. **[Optional]** Select **And** or **Or** and repeat Step 3 on the second line to establish a second condition.
5. Click **OK** to set your filter.

Click the filter icon to set a "snap filter"

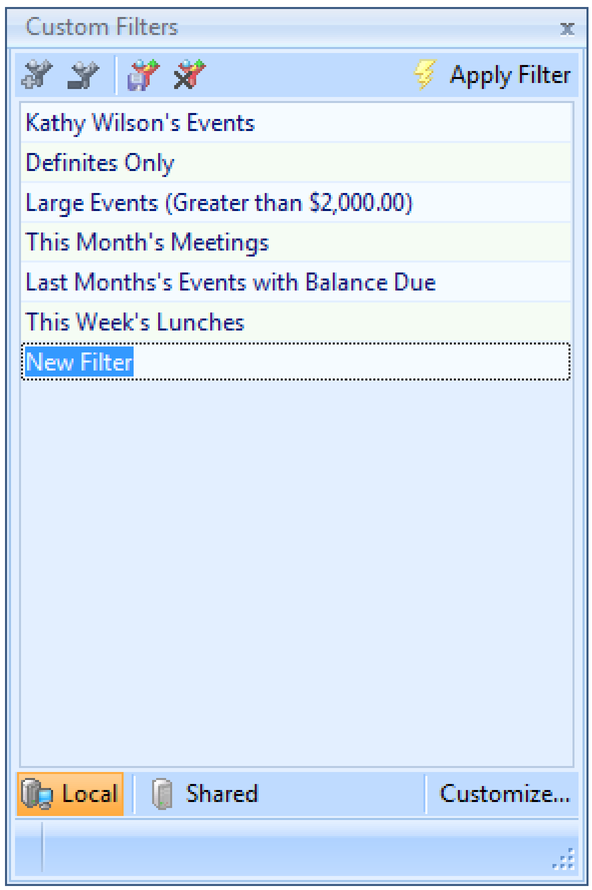


Current filter is displayed at the bottom of the screen

Saving the Grid Filter

Just like custom grid views, you can save your custom filers for future use. Again, these can be saved locally or shared across the Caterease network.

1. Establish filters as outlined above.
2. Click the **Filters** button at the top left of the results grid display.
   Result: *A drop-down list displays.*
3. Choose **Custom**.
4. ***Result:*** *The Custom Filters window opens.*
5. [**Optional**] Click the **Shared** button at the bottom of the Custom Filters window if you want this custom filter to be shared with other users on your Caterease network.
   Note: *The* ***Local*** *button, selected by default, means this filter will be available only on your computer.*
6. Click the **Add Filter** button  .
   Result*: A new filter is added to your list, with the default name New Filter.*
7. Type a name for your new filter.
8. Click the **Save Current Filter** button  .
9. Close the Custom Filters window.



Printing/Exporting Grid Data

Can I print my custom grid or export it?

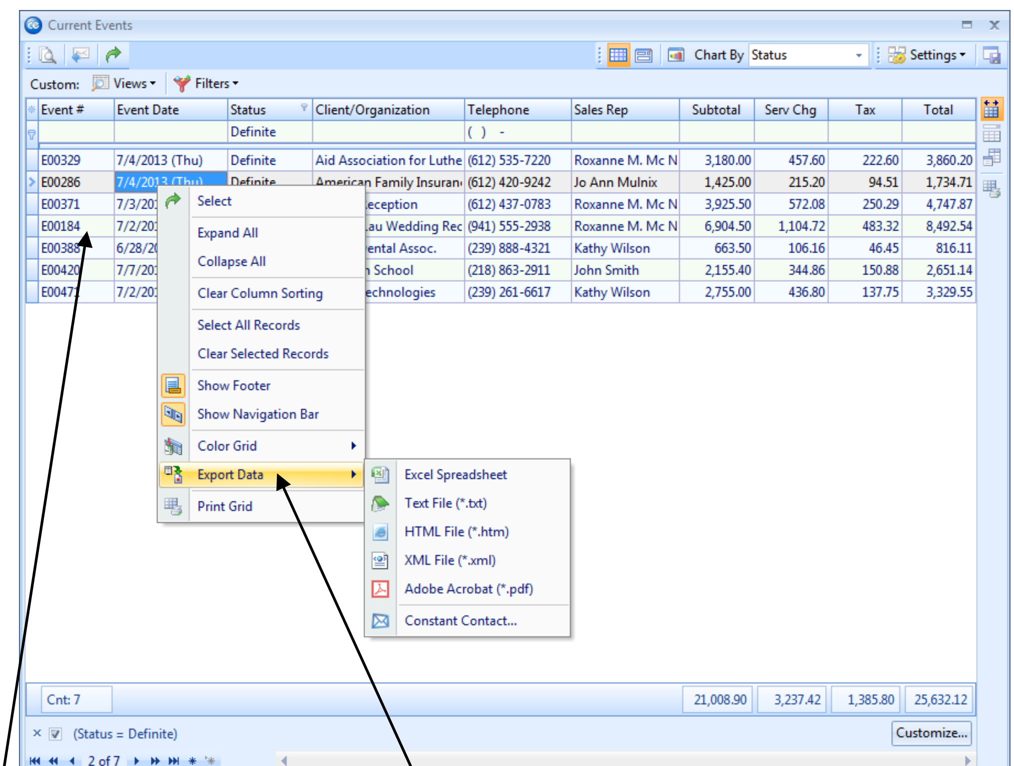
Sure! Once you've designed your custom grid, you can give it any title you want and print it as a completely customized report! Or, you can easily export it in a variety of formats for use in another software program.

Printing a Grid

1. Customize your results grid as explained on the preceding pages.
2. Click the **Print Grid** button at the right of the grid display.
   Result: *A print preview of your custom grid appears.*
3. **[Optional]** Click the **Print Title** button at the top of the Print Preview screen to edit the text and format of the title of this print.
4. Click the **Print** button at the top of the Print Preview screen to send the print to your printer.

Exporting Grid Data

1. Click your right mouse button anywhere in the grid display.
2. Select **Export Data**.
3. Choose an export format — Microsoft Excel, text file, HTML, or XML.
   Result: *A window appears for you to enter a name for your exported file and a directory for it to be saved in.*
4. Click the down arrow next to <u>Save In</u> at the top of the window to choose a location for your exported file.
5. Click in the <u>File Name</u> field at the bottom of the window and type a name for your exported file.
6. Click **Save**.
   Result: *A prompt will appear.*
7. ***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 version, you will need to open a third-party application on your own and seek out the export file.*



Right-click anywhere in the grid *Choose **Export Data***

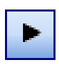
Multiple/Batch Printing (See image on following page)

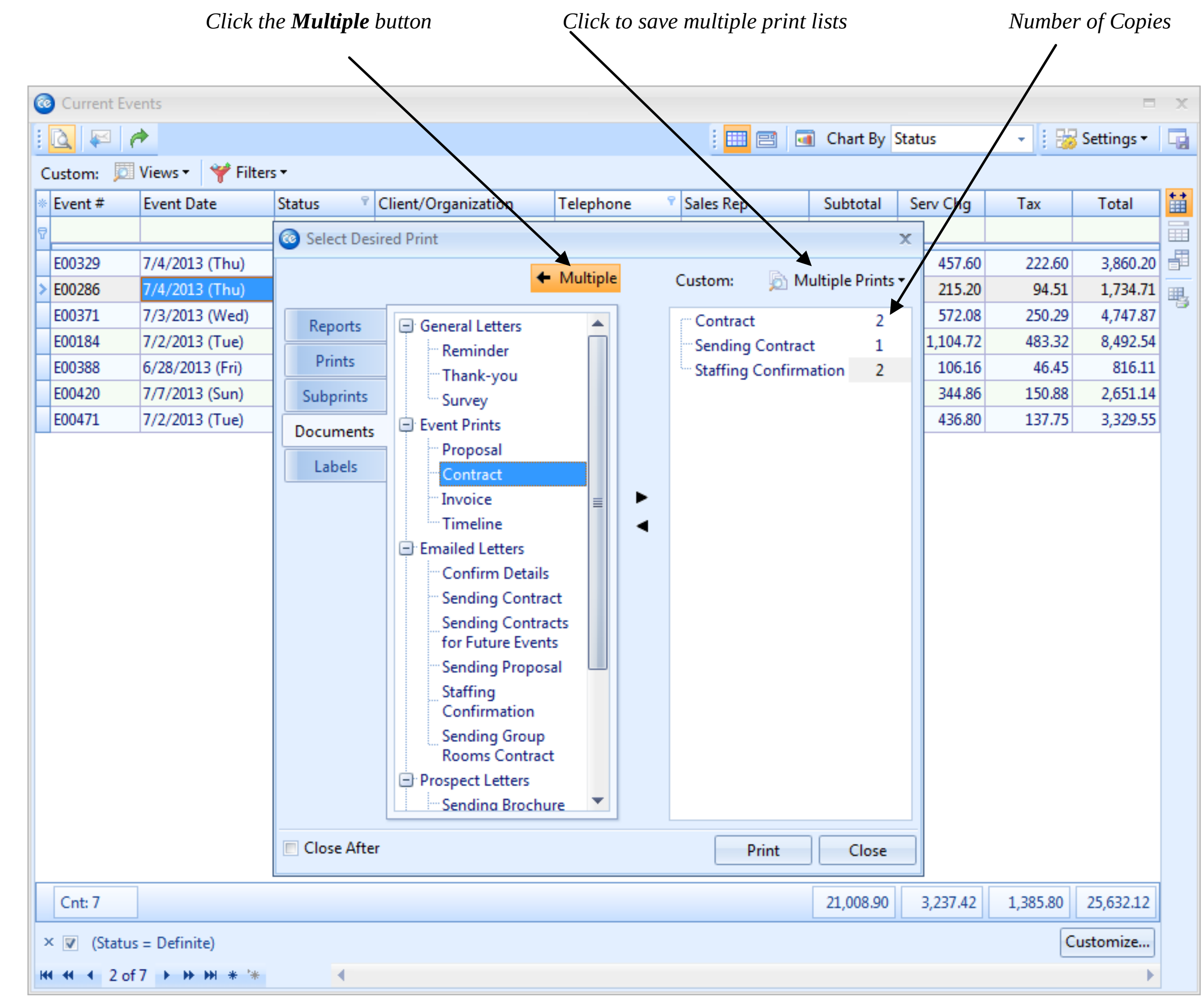
So now that I have a list of parties, can I print all of their contracts?
Believe it or not, you can! You can print a contract, invoice, or other print for any or all events in your list. Or you can print a contract AND an invoice AND other prints – all at one time!

Generating a Print for Multiple Events

1. Select multiple events by holding down your **[Shift]** or **[Ctrl]** key while selecting.
2. Click the **Print** button.
   Result: *The Select Desired Print window appears.*
3. Select the *Prints*, *Sub-Prints*, *Documents, or Labels.*
   Note: *Batch printing is not available for reports.*
4. Select a print title.
5. Click the **Print** button at the bottom right of the form.
   Result: *One print for each of the selected events will automatically be sent to your printer.*
   Note: *Batch prints do not generate a Print Preview; they are sent to your printer automatically.*

Generating Multiple Prints for Multiple Events (*Not available in Express version)*

1. Select an event from your results screen, or hold your [**Shif**t] or [**Ctrl**] key down to select multiple records.
   Note: *The **[Ctrl]** key lets you select multiple records; the [**Shift**] key selects two records and all other in between them.*
2. Click the **Print** button.
   Result: *The Select Desired Print window appears.*
3. Click the **Multiple** button.
   Result: *A new panel opens along the right side of the Select Desired Print window.*
4. Select the *Prints*, *Sub-Prints*, *Documents, or Labels tab.*
   Note: *Multiple printing is not available (and not necessary) for reports.*
5. Select a print title.
6. Click the right arrow button  in the middle of the Select Desired Print window.
   Result: *Your selected print title is moved to the right-hand panel.*
7. Repeat for other desired prints.
8. Click the **Print** button the bottom right of the form.
   Result: *Multiple prints for each of the selected events will be automatically sent to your printer.*
   Note: *Multiple prints do not generate a Print Preview; they are sent to your printer automatically.*

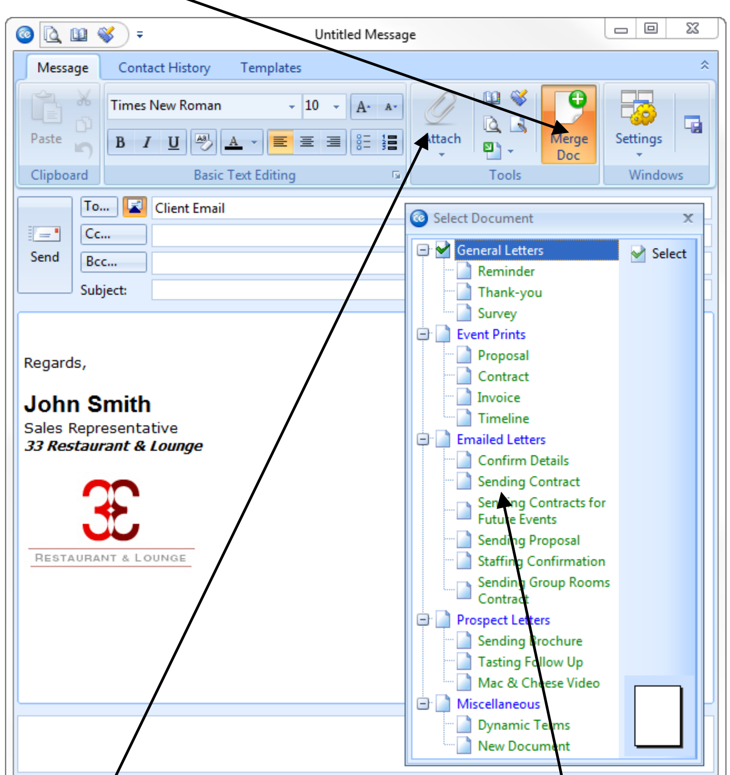

Click the **Multiple** button
Click to save multiple print lists
Number of Copies
Current Events
Chart By
Status
Settings
Custom:
Views
Filters
Event #
Event Date
Status
Client/Organization
Telephone
Sales Rep
Subtotal
Serv Chg
Tax
Total
Select Desired Print
Multiple
Custom:
Multiple Prints
Reports
Prints
Subprints
Documents
Labels
General Letters
Reminder
Thank-you
Survey
Event Prints
Proposal
Contract
Invoice
Timeline
Emailed Letters
Confirm Details
Sending Contract
Sending Contracts for Future Events
Sending Proposal
Staffing Confirmation
Sending Group Rooms Contract
Prospect Letters
Sending Brochure
Contract 2
Sending Contract 1
Staffing Confirmation 2
Close After
Print
Close
Cnt: 7
(Status = Definite)
Customize...
2 of 7

E-mailing in a Batch

Great! Now what about e-mailing?
Well, if you have the Professional version of the program, you will not believe what you can do! From any query grid, you can generate batch e-mails and even use merge letters as the outgoing e-mail message! That means a unique e-mail goes out to any number of recipients – complete with optional attachments – all with a single mouse click!

1. Select multiple events in the grid by holding down your **[Shift]** or [**Ctrl**] key while selecting.
2. Click the **Email** button at the top left of the query results screen.
   Result: *An Untitled Message window appears.*
   Note: *The e-mail address for this outgoing e-mail will default to the Client e-mail associated with each selected record.*
3. Click the down arrow to the right of the To... field and choose to send the e-mail to the general client e-mail address, or specifically to the booking contact or site contact of the selected events.
4. Type a subject for your e-mail into the Subject... field, or click the down arrow to the right of the field to access a custom quick-pick list.
5. Type a message as the body of your e-mail in the large white text block in the window.
   Note: *If you own the Marketing Tools package, you can use one of your custom merge letters as the body of your e-mail. These letters will automatically merge in information from the current prospect, including name, salutation, current date, etc.*
6. **[Optional]** Format the text of your e-mail using the Format toolbar on your e-mail window.
7. **[Optional]** Click the **Attach** button at the top of the e-mail window and choose **File** to attach a general computer file to your e-mail, or choose **Print** to attach one or several Caterease event prints.
8. ***Note:*** *Attached files and prints appear in the small pane at the bottom of the Email window.*
9. When finished, click **Send**.
   Result: *The e-mails are sent through your Outlook program, and any files you have attached are exported.*

Click to attach a merge document



Click to attach an event print *or* *Choose a merge document*

Using the EZ Chart View

This is amazing! Anything else?
You mean, like single mouse click access to a dynamic graphing feature that will let you have all of the details in your grid in an easy-to-read, presentation-type format? Sure – why not?

Viewing a Chart

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

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.

Customizing the Chart

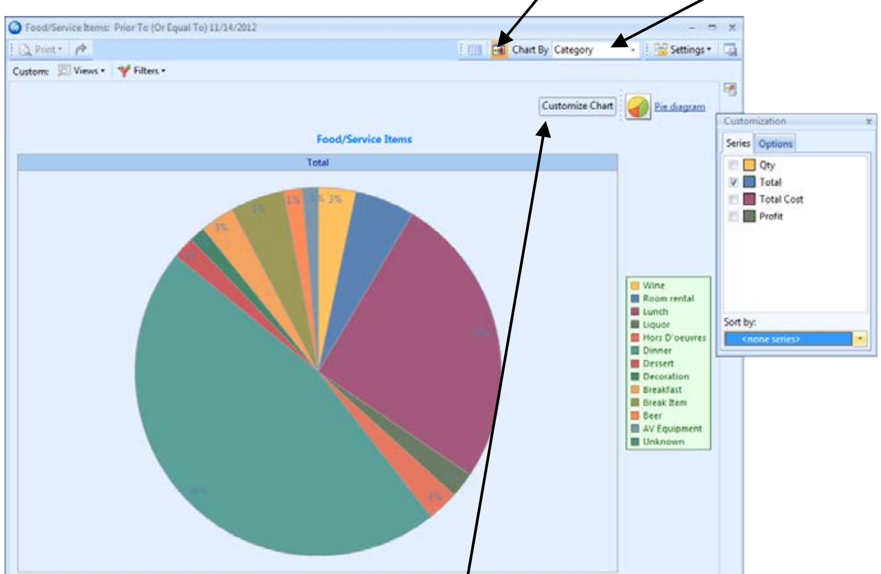
1. Click **Customize Chart** at the top right of the chart.
   Result: *A customization window appears.*
2. Set optional settings on the Series, Options, *and* Sort by tabs.
3. Click the small **X** at the top right of the Customization window to close it.

Printing the Chart

1. Click the **Print Chart** button  at the right of the results screen.
   Result: *A print preview screen appears.*
2. Click the **Print** button  at the top left-hand side of the Print Preview screen to send the print to your printer.

Click to view in a chart

Select a field to chart by



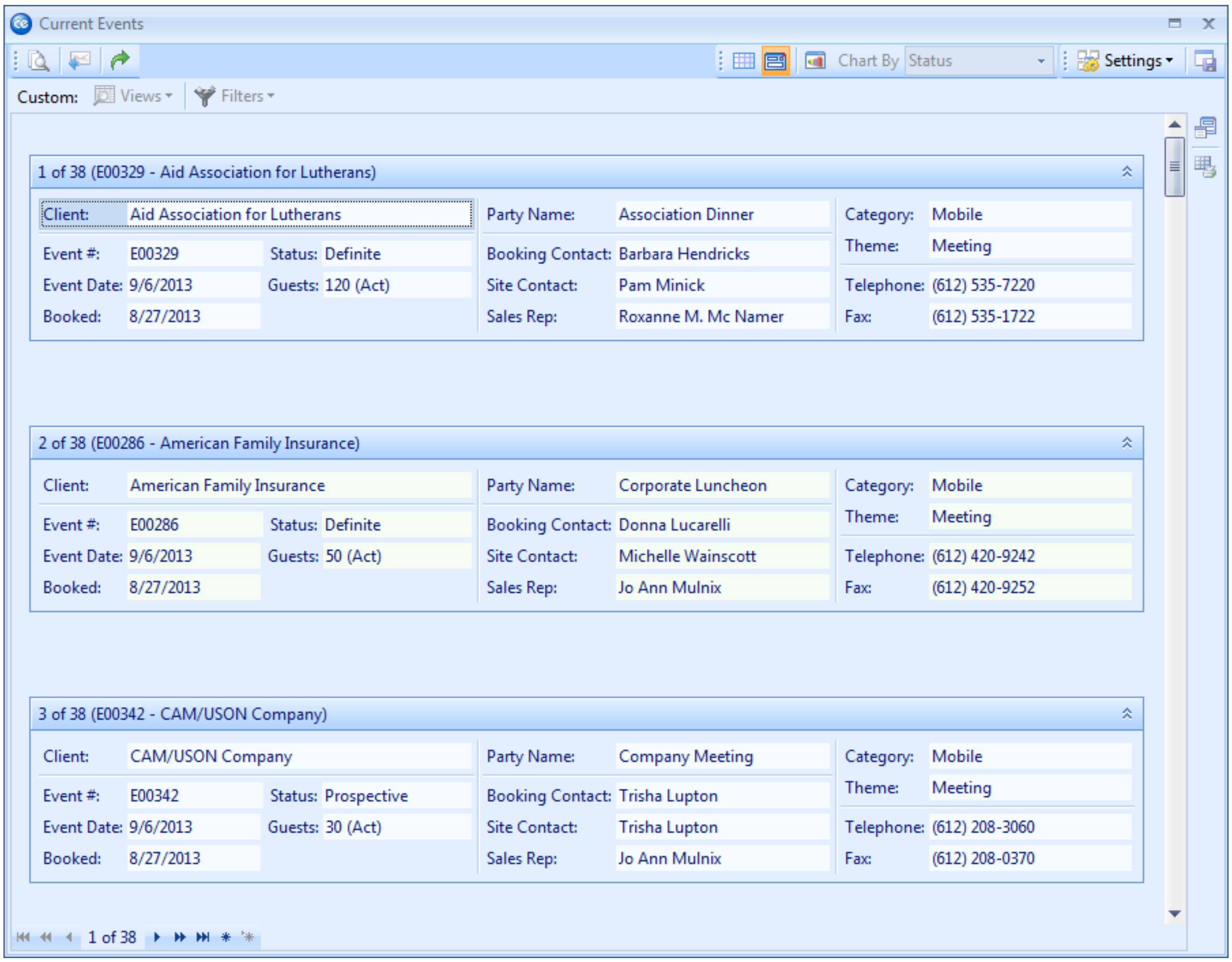
Click to customize the chart

Viewing Grid Results in Layout View

Am I able to customize the information I would like to view?
Yes! In addition to being able to view grid results in a chart view, you are able to view the grid results in a handy layout view (if you own the Professional version). The fields which display on the layout view are customizable, and the end result can be printed or e-mailed, as described in other sections of this guide.

Viewing Grid Results in Layout View

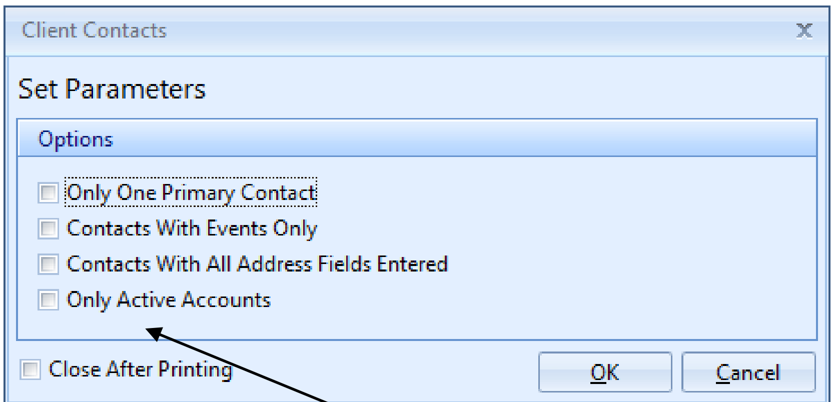
1. Click the **Layout View** button, located at the top of the query results grid.
   Result: *The grid display changes to a layout view.*
2. Click the **Field Chooser** button, located on the right-hand side of the screen, if you would like to add or remove fields.



Generating the Client Contacts Query

What is a Client Contacts Query?
This special query tool allows you to instantly track all contact people for your various accounts. Choose from a couple of optional settings, and you instantly get a list that you can redesign, print, or export in various formats.

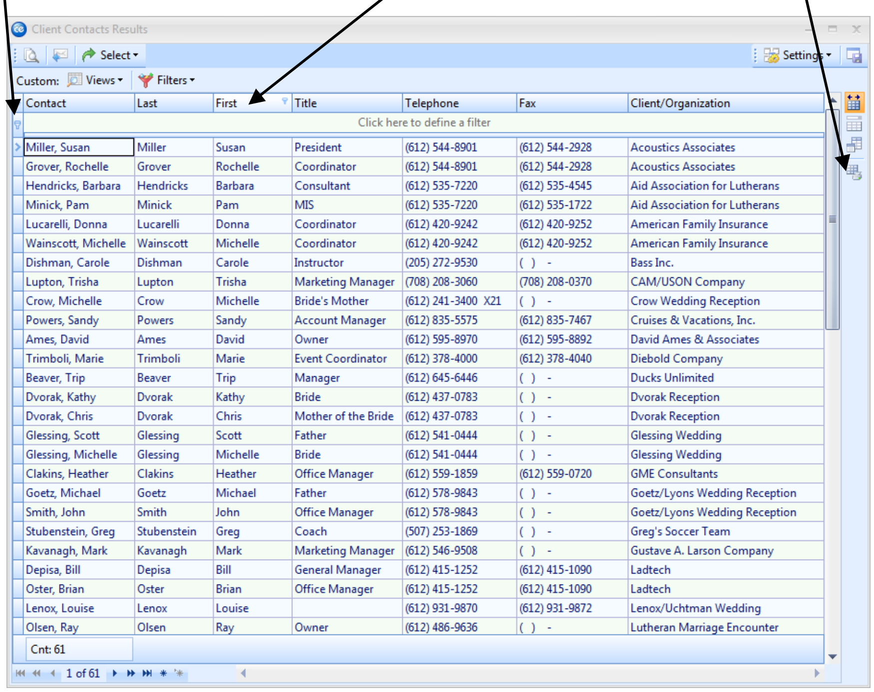
1. Click the **Tools** sidebar group and choose **Client Contacts.**
2. Optionally choose to see Only One Primary Contact, Contacts With Events Only, Contacts with All Address Fields Entered, or Only Active Accounts by clicking the checkbox next to each option.
   Note: Click a checkbox once to enable that option; click it again to remove the check and disable that option.
3. Click **OK**.
   Note: *This grid can be redesigned, printed as a custom report, or exported for use in other software programs.*



Click the appropriate checkbox

Result of a Client Contacts Query:

Customize the fields *Sort your data by column header* *Print the grid*

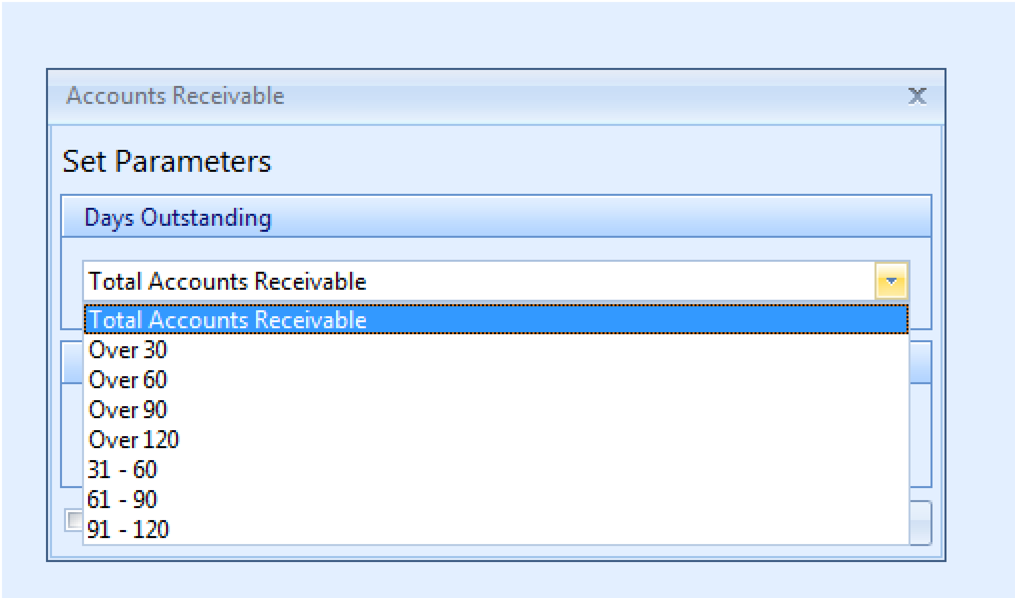


Contact	Last	First	Title	Telephone	Fax	Client/Organization
Miller, Susan	Miller	Susan	President	(612) 544-8901	(612) 544-2928	Acoustics Associates
Grover, Rochelle	Grover	Rochelle	Coordinator	(612) 544-8901	(612) 544-2928	Acoustics Associates
Hendricks, Barbara	Hendricks	Barbara	Consultant	(612) 535-7220	(612) 535-4545	Aid Association for Lutherans
Minick, Pam	Minick	Pam	MIS	(612) 535-7220	(612) 535-1722	Aid Association for Lutherans
Lucarelli, Donna	Lucarelli	Donna	Coordinator	(612) 420-9242	(612) 420-9252	American Family Insurance
Wainscott, Michelle	Wainscott	Michelle	Coordinator	(612) 420-9242	(612) 420-9252	American Family Insurance
Dishman, Carole	Dishman	Carole	Instructor	(205) 272-9530	( ) -	Bass Inc.
Lupton, Trisha	Lupton	Trisha	Marketing Manager	(708) 208-3060	(708) 208-0370	CAM/USON Company
Crow, Michelle	Crow	Michelle	Bride's Mother	(612) 241-3400 X21	( ) -	Crow Wedding Reception
Powers, Sandy	Powers	Sandy	Account Manager	(612) 835-5575	(612) 835-7467	Cruises & Vacations, Inc.
Ames, David	Ames	David	Owner	(612) 595-8970	(612) 595-8892	David Ames & Associates
Trimboli, Marie	Trimboli	Marie	Event Coordinator	(612) 378-4000	(612) 378-4040	Diebold Company
Beaver, Trip	Beaver	Trip	Manager	(612) 645-6446	( ) -	Ducks Unlimited
Dvorak, Kathy	Dvorak	Kathy	Bride	(612) 437-0783	( ) -	Dvorak Reception
Dvorak, Chris	Dvorak	Chris	Mother of the Bride	(612) 437-0783	( ) -	Dvorak Reception
Glessing, Scott	Glessing	Scott	Father	(612) 541-0444	( ) -	Glessing Wedding
Glessing, Michelle	Glessing	Michelle	Bride	(612) 541-0444	( ) -	Glessing Wedding
Clakins, Heather	Clakins	Heather	Office Manager	(612) 559-1859	(612) 559-0720	GME Consultants
Goetz, Michael	Goetz	Michael	Father	(612) 578-9843	( ) -	Goetz/Lyons Wedding Reception
Smith, John	Smith	John	Office Manager	(612) 578-9843	( ) -	Goetz/Lyons Wedding Reception
Stubenstein, Greg	Stubenstein	Greg	Coach	(507) 253-1869	( ) -	Greg's Soccer Team
Kavanagh, Mark	Kavanagh	Mark	Marketing Manager	(612) 546-9508	( ) -	Gustave A. Larson Company
Depisa, Bill	Depisa	Bill	General Manager	(612) 415-1252	(612) 415-1090	Ladtech
Oster, Brian	Oster	Brian	Office Manager	(612) 415-1252	(612) 415-1090	Ladtech
Lenox, Louise	Lenox	Louise		(612) 931-9870	(612) 931-9872	Lenox/Uchtman Wedding
Olsen, Ray	Olsen	Ray	Owner	(612) 486-9636	( ) -	Lutheran Marriage Encounter

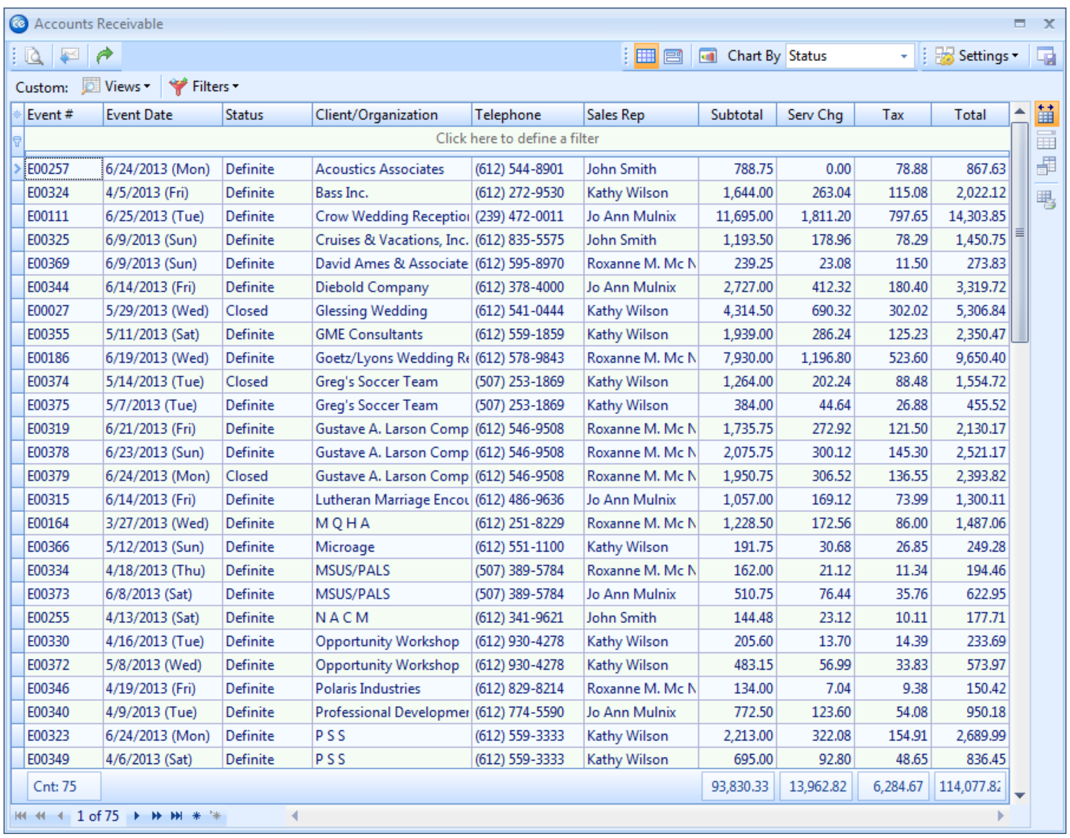
Generating the Accounts Receivable Query

Running an Accounts Receivable Query

1. Click the **Tools** sidebar on the left-hand side of Caterease.
2. Click the button labeled **Accounts Receivable**.
3. Click the down arrow under <u>Days Outstanding</u>, and set a date range for your query.
4. Click under <u>Options</u> to exclude events with very small balances.
5. Click **OK** to generate the query.



Query Results:

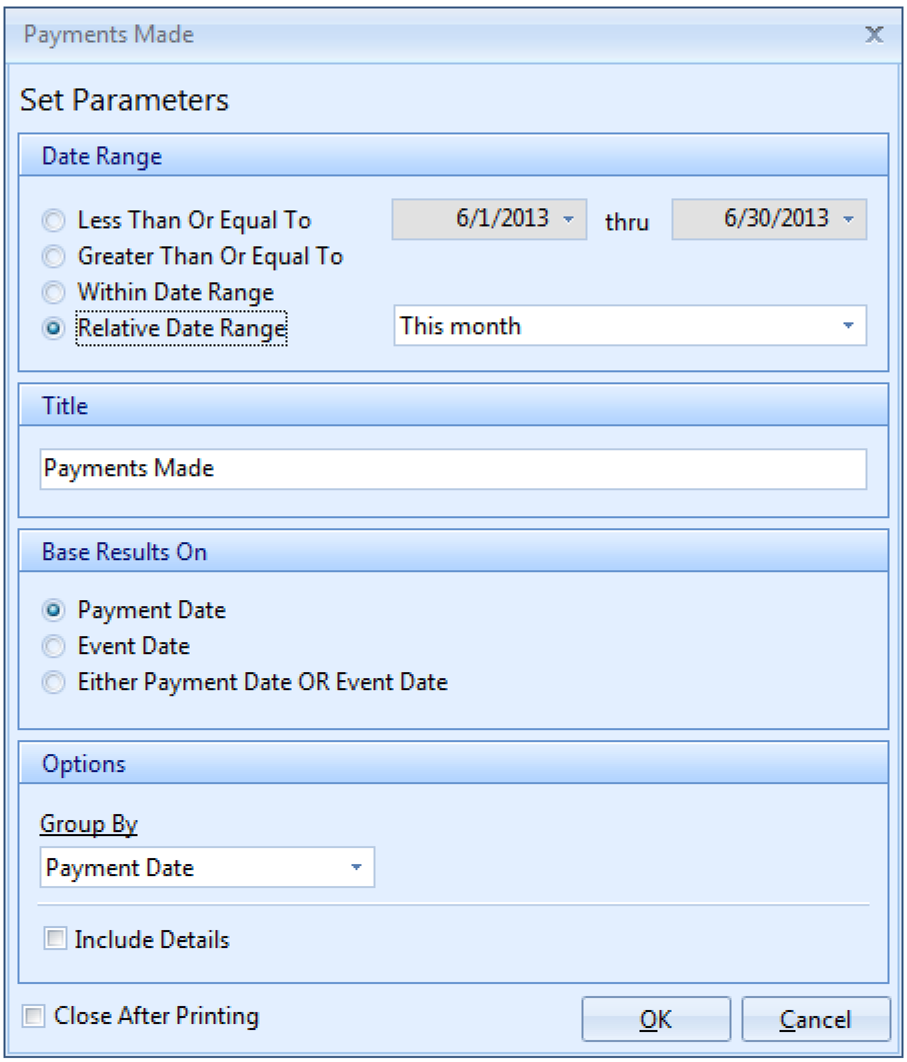


Event #	Event Date	Status	Client/Organization	Telephone	Sales Rep	Subtotal	Serv Chg	Tax	Total
E00257	6/24/2013 (Mon)	Definite	Acoustics Associates	(612) 544-8901	John Smith	788.75	0.00	78.88	867.63
E00324	4/5/2013 (Fri)	Definite	Bass Inc.	(612) 272-9530	Kathy Wilson	1,644.00	263.04	115.08	2,022.12
E00111	6/25/2013 (Tue)	Definite	Crow Wedding Receptio	(239) 472-0011	Jo Ann Mulnix	11,695.00	1,811.20	797.65	14,303.85
E00325	6/9/2013 (Sun)	Definite	Cruises & Vacations, Inc.	(612) 835-5575	John Smith	1,193.50	178.96	78.29	1,450.75
E00369	6/9/2013 (Sun)	Definite	David Ames & Associate	(612) 595-8970	Roxanne M. Mc N	239.25	23.08	11.50	273.83
E00344	6/14/2013 (Fri)	Definite	Diebold Company	(612) 378-4000	Jo Ann Mulnix	2,727.00	412.32	180.40	3,319.72
E00027	5/29/2013 (Wed)	Closed	Glessing Wedding	(612) 541-0444	Kathy Wilson	4,314.50	690.32	302.02	5,306.84
E00355	5/11/2013 (Sat)	Definite	GME Consultants	(612) 559-1859	Kathy Wilson	1,939.00	286.24	125.23	2,350.47
E00186	6/19/2013 (Wed)	Definite	Goetz/Lyons Wedding Re	(612) 578-9843	Roxanne M. Mc N	7,930.00	1,196.80	523.60	9,650.40
E00374	5/14/2013 (Tue)	Closed	Greg's Soccer Team	(507) 253-1869	Kathy Wilson	1,264.00	202.24	88.48	1,554.72
E00375	5/7/2013 (Tue)	Definite	Greg's Soccer Team	(507) 253-1869	Kathy Wilson	384.00	44.64	26.88	455.52
E00319	6/21/2013 (Fri)	Definite	Gustave A. Larson Comp	(612) 546-9508	Roxanne M. Mc N	1,735.75	272.92	121.50	2,130.17
E00378	6/23/2013 (Sun)	Definite	Gustave A. Larson Comp	(612) 546-9508	Roxanne M. Mc N	2,075.75	300.12	145.30	2,521.17
E00379	6/24/2013 (Mon)	Closed	Gustave A. Larson Comp	(612) 546-9508	Roxanne M. Mc N	1,950.75	306.52	136.55	2,393.82
E00315	6/14/2013 (Fri)	Definite	Lutheran Marriage Encou	(612) 486-9636	Jo Ann Mulnix	1,057.00	169.12	73.99	1,300.11
E00164	3/27/2013 (Wed)	Definite	M Q H A	(612) 251-8229	Roxanne M. Mc N	1,228.50	172.56	86.00	1,487.06
E00366	5/12/2013 (Sun)	Definite	Microage	(612) 551-1100	Kathy Wilson	191.75	30.68	26.85	249.28
E00334	4/18/2013 (Thu)	Definite	MSUS/PALS	(507) 389-5784	Roxanne M. Mc N	162.00	21.12	11.34	194.46
E00373	6/8/2013 (Sat)	Definite	MSUS/PALS	(507) 389-5784	Jo Ann Mulnix	510.75	76.44	35.76	622.95
E00255	4/13/2013 (Sat)	Definite	N A C M	(612) 341-9621	John Smith	144.48	23.12	10.11	177.71
E00330	4/16/2013 (Tue)	Definite	Opportunity Workshop	(612) 930-4278	Kathy Wilson	205.60	13.70	14.39	233.69
E00372	5/8/2013 (Wed)	Definite	Opportunity Workshop	(612) 930-4278	Kathy Wilson	483.15	56.99	33.83	573.97
E00346	4/19/2013 (Fri)	Definite	Polaris Industries	(612) 829-8214	Roxanne M. Mc N	134.00	7.04	9.38	150.42
E00340	4/9/2013 (Tue)	Definite	Professional Developmer	(612) 774-5590	Jo Ann Mulnix	772.50	123.60	54.08	950.18
E00323	6/24/2013 (Mon)	Definite	P S S	(612) 559-3333	Kathy Wilson	2,213.00	322.08	154.91	2,689.99
E00349	4/6/2013 (Sat)	Definite	P S S	(612) 559-3333	Kathy Wilson	695.00	92.80	48.65	836.45
Cnt: 75						93,830.33	13,962.82	6,284.67	114,077.8

Running the Accounts Receivable Report

Running an Accounts Receivable Report

1. Click the **Reports** ribbon tab**.**
2. Click the **Financials** button and select **Accounts Receivable**.
3. Click the down arrow under <u>Accounts Receivable As Of</u> and set a date range for your query.
4. Click the checkbox next to any option to select it for your report:
    - **Show Payments**- Click to show payments on the report
    - **Include Events with Negative Balances-**Click to include events that have negative balances (events with credits applied)
    - **Include Events with Very Small Balances-**Click to include events with small balances (of a few pennies)
    - **Include Payments Made After Accounts Receivable As Of Date-**This option includes payments on the report even if they were made after the "as of" date you have selected.
5. Click **OK** to generate the report.



Unit 17: Using the Events Query

Topics covered in this unit include:

Building a Custom Query
Modifying and Saving Queries
Generating Prints and Reports
Editing an Events Query in a Batch

Querying Events

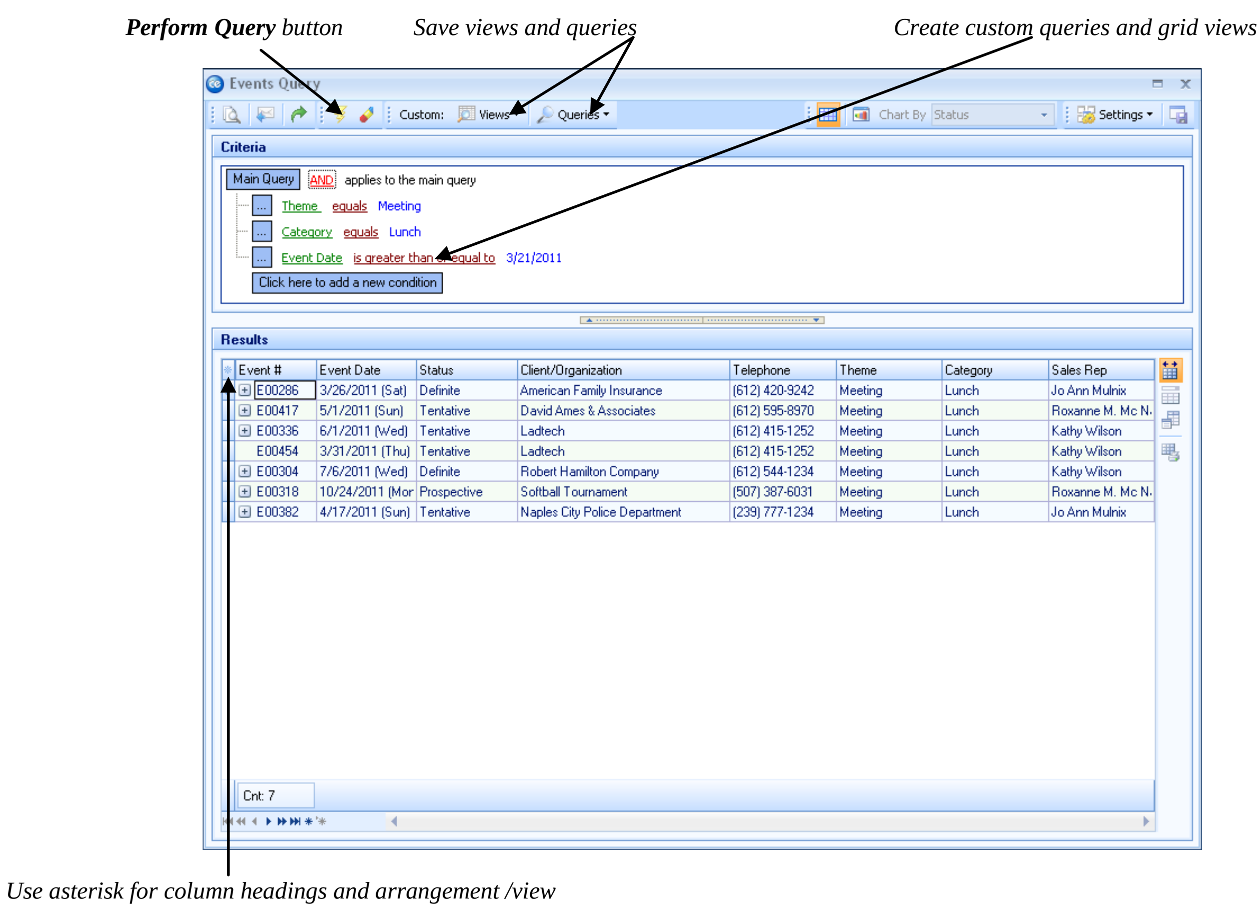
What is an Events Query?
The Events Query tool allows you to search through your entire database and find only those events you want to see. You can set any number of criteria to search by, and even save queries for future use. Once a query has been performed, you can print various reports based on the results, as well as event prints for any and all events on your results screen.

Creating a Query

1. Select **Events Query** from the **Queries** sidebar.
2. Click on the Click here to add a new condition button to add a criterion (condition). A condition will be added stating “Event Date equals <empty>.”
3. Click on the words **Event Date** in the condition and choose any condition from the drop-down list. This will be the first criteria you search by.
4. Click the comparison word next to your criteria and choose any option. Comparisons might say “Is,” “Contains,” “Doesn’t Contain,” “Is Empty,” “Is Between,” etc.
5. Click <empty> in the condition and choose a value for the condition to be compared to. These lists are dynamic. If you are searching by Event Theme, then this list will be your quick-pick list of themes. If you are searching by date, this list will be days or ranges of days. If you are searching by financial fields, you will be given a window to type a specific value.
6. Add as many query conditions as desired following the steps above.

Executing the Query

1. Create or edit a query as described above.
2. Click the **Perform Query** (lightning bolt) button.



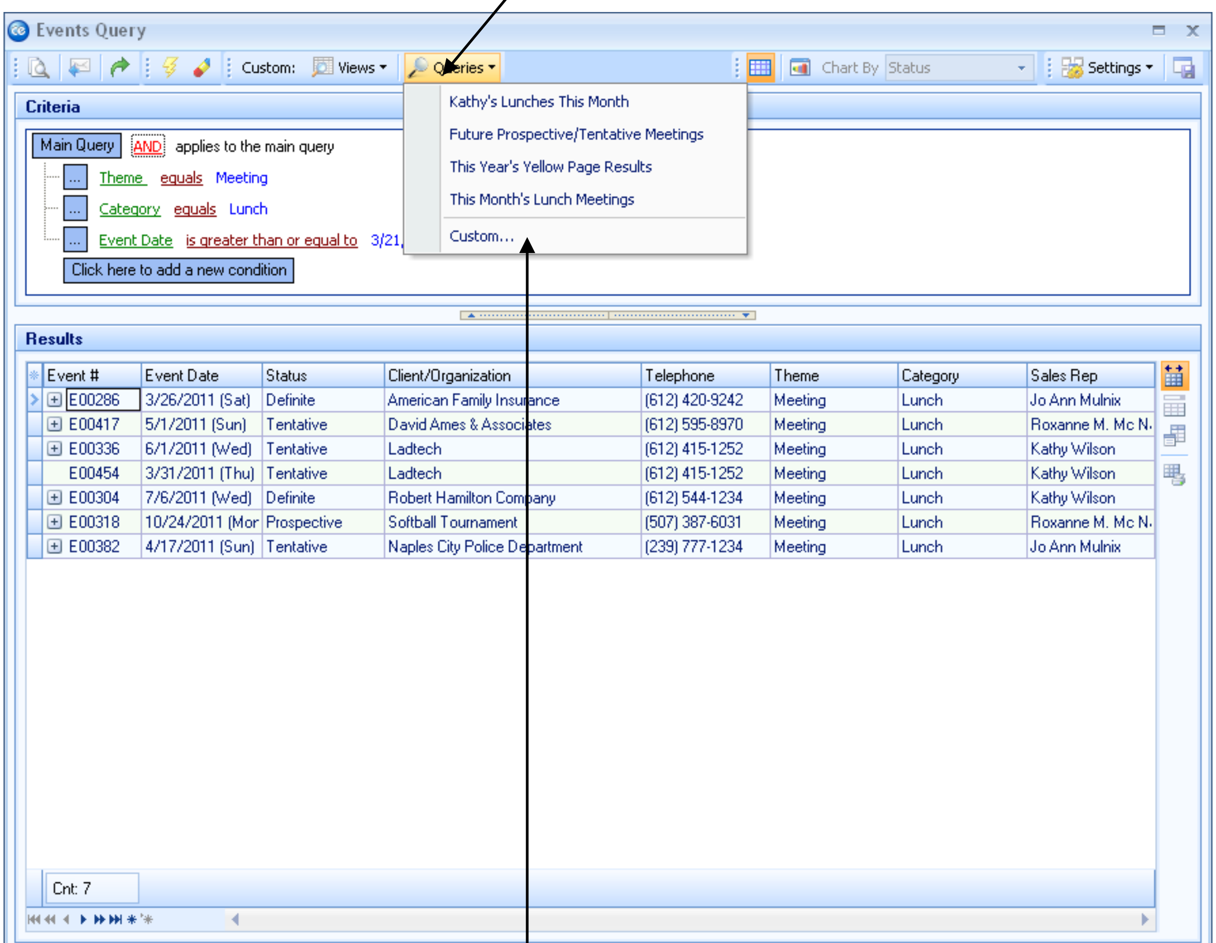
Saving Custom Queries

Can I save queries for future use?
Any custom query you build – no matter how many conditions – can be saved so that in the future it can be run, with a single click!

Saving a Custom Query

1. Create an Events Query as described on the previous page.
2. Click the **Queries** button at the top left of the results grid display.
3. Choose **Custom**.
   Result: *The Custom Queries window displays.*
4. **[Optional]** Click the **Shared** button at the bottom of the Custom Queries window if you want this custom query to be shared with other users on your Caterease network.
   Note: *The* ***Local*** *button is selected as a default; all local queries will only be available on your computer.*
5. Click the **Add Query** button .
6. Type a name for your new query.
7. Click the **Save Current Query** button .
8. Close the Custom Queries window.

Click ***Queries*** *to open a query or save a custom query*

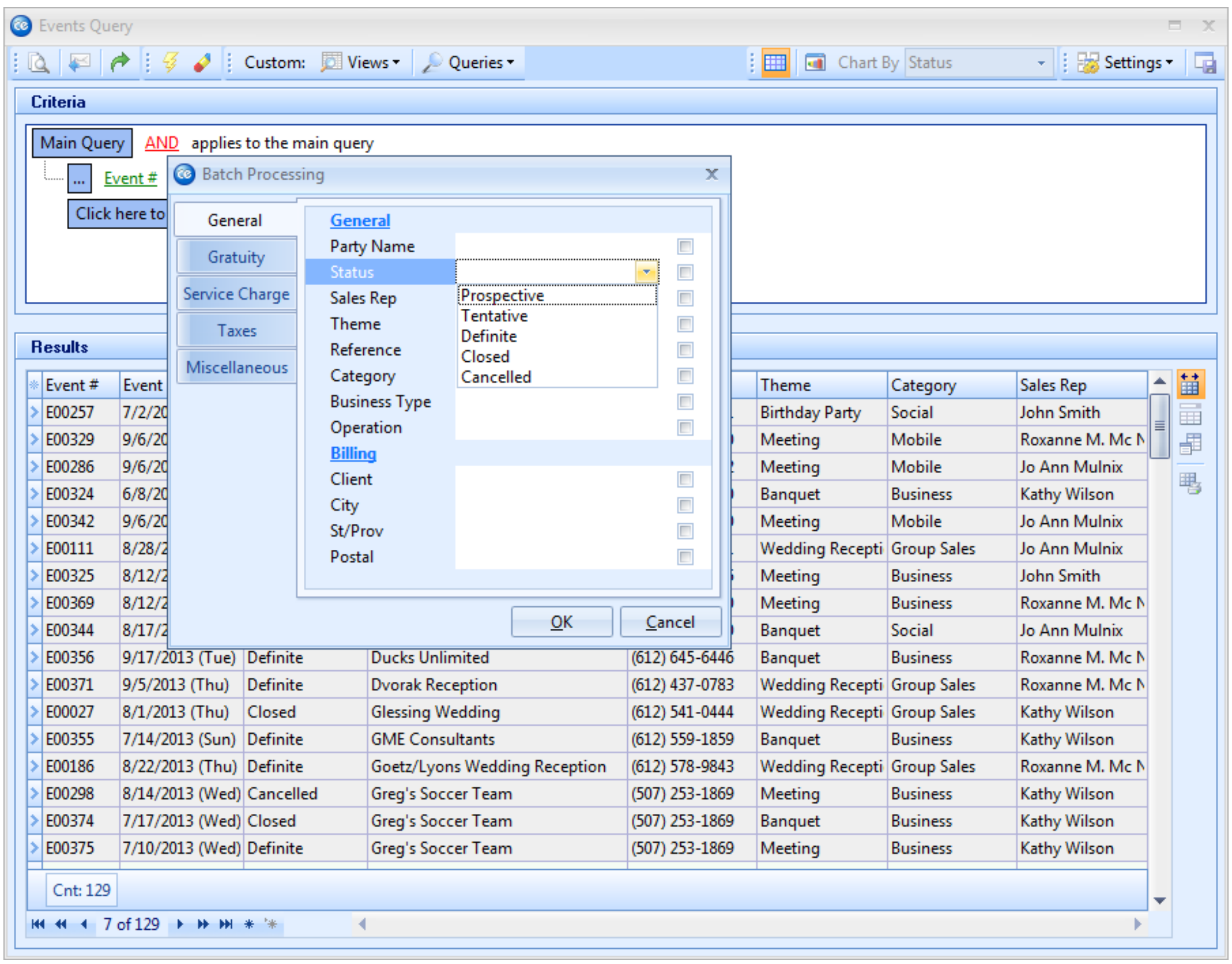


Choose ***Custom*** *to save the new query*

Editing an Events Query in a Batch

Am I able to change some information about an entire group of customers?
Yes! You can make changes to multiple items simultaneously within your Events Query. Change such items as status, tax rates, service charge rates, or a host of other options.

1. Create an Events Query as described on the previous page.
2. In the main pane of the window, select multiple items by either holding your **[Shift]** key down to select a group of contiguous items or by holding your **[Ctrl]** key down to select items at random.
3. Click your right mouse button over any one of the selected items.
   Result: *A pop-up menu of options appears.*
4. Choose **Batch Processing**.
   Result: *The Batch Processing window* opens.
5. On the **General** tab of the Batch Processing window, click the checkbox next to any field you would like to change for all of your selected items.
6. In the field itself, enter the new value you would like for the selected items.
   Note: *Most fields have custom quick-pick lists for your convenience. Some have checkboxes you can enable or disable for the selected items.*
7. When finished, click **OK**.
   Result: *Your changes are applied and a confirmation appears. Depending on the number of changes/items, this could take a few minutes.*



Unit 18: Activity Queries vs. Reports

Topics covered in this unit include:

Using the Food/Service Activity Query
Generating a Food/Service Items Report
Using the Payments Activity Query
Generating the Payments Made Report

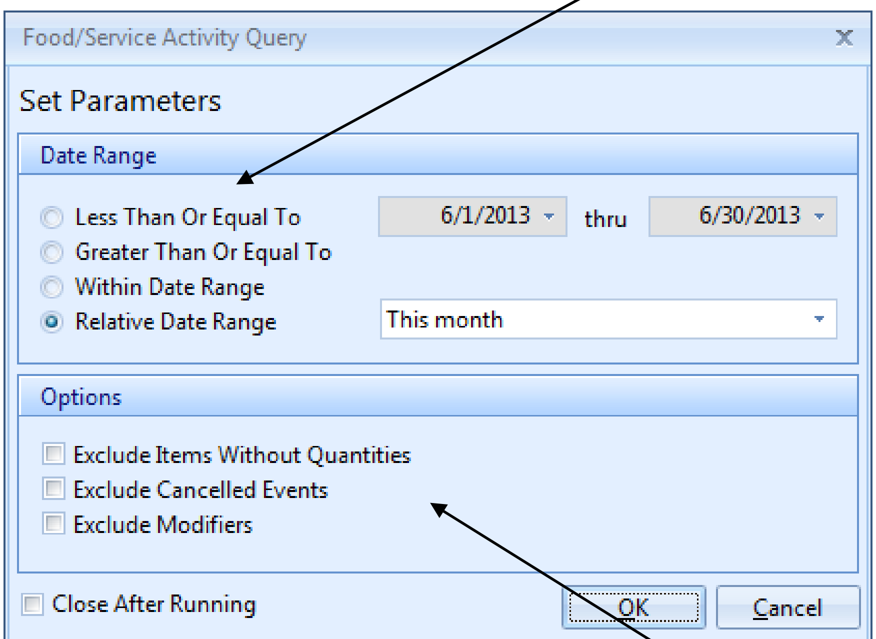
Food Service Activity Query

What is a Food/Service Activity Query?
This dynamic tool can show you all food or service items that have been ordered for an entire day or date range. You can then the results screen (described on the following page) to zero in on the exact details you want to see - for example, how many equipment items were used in a particular room, how many dessert items a specific sales representative sold, etc. In addition, the results of the query can be exported as an Excel spreadsheet, text file, HTML file, or XML file. As you can imagine, you can further manipulate the data in Excel to produce even more varied reporting.

Performing a Food/Service Query

1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Food/Service Activity** button.
3. Choose to track food/service items ordered before or on a specific date, after or on a specific date, or within a date range.
4. Choose to exclude items that have no quantities, or ones that have been ordered for cancelled events, or exclude modifiers.
5. Click **OK**.

Select desired query parameters



Select desired options

Food Service Activity Query Results Screen

What can I do with the results of my activity query?
As with any other details grid in the program, the results screen of the Food/Service Activity Query can be manipulated in many powerful ways. You can add or remove various columns of information to the grid, sort, or group the data by any detail, and even perform various “snap filters” to instantly filter out data.

Adding Columns

1. Click the **Quick Column Customizing** button, located at the top left of the detail grid (to the left of the first column heading).
2. Click the checkbox next to any optional field name.
3. [**Optional**] Hold your left mouse button down on that column name in the list and drag up or down to reposition it within the grid.
4. Remember to click the **Save Window Settings** button  if you want to save your new arrangement.

Sorting Data

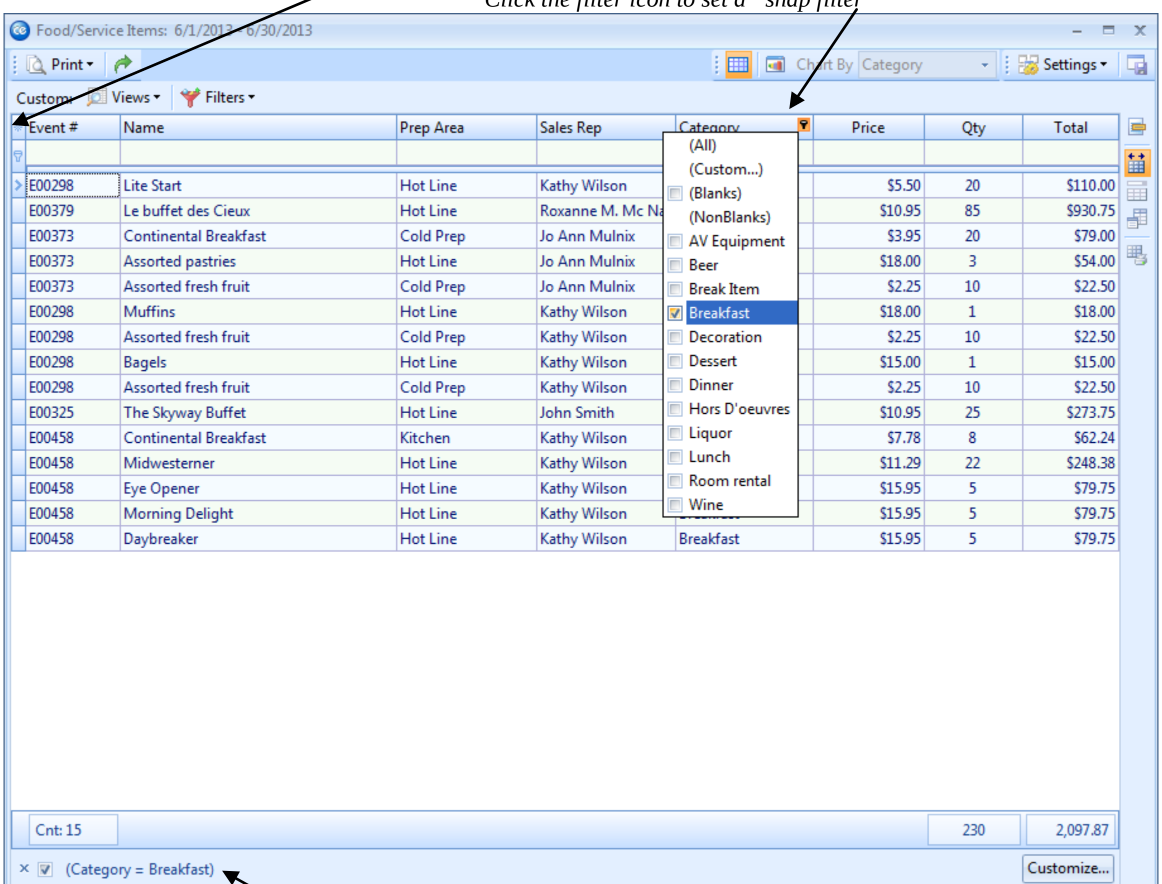
1. Click the heading of a column you wish to sort by.

Using the “Snap Filter” Tool

1. Click the filter icon at the right of any column heading.
2. Make a selection from the corresponding drop-down list of choices.
3. Repeat steps 1 and 2 as desired to set more filter options.

Click to add or remove columns to display

Click the filter icon to set a “snap filter”



Current filter is displayed at bottom of display

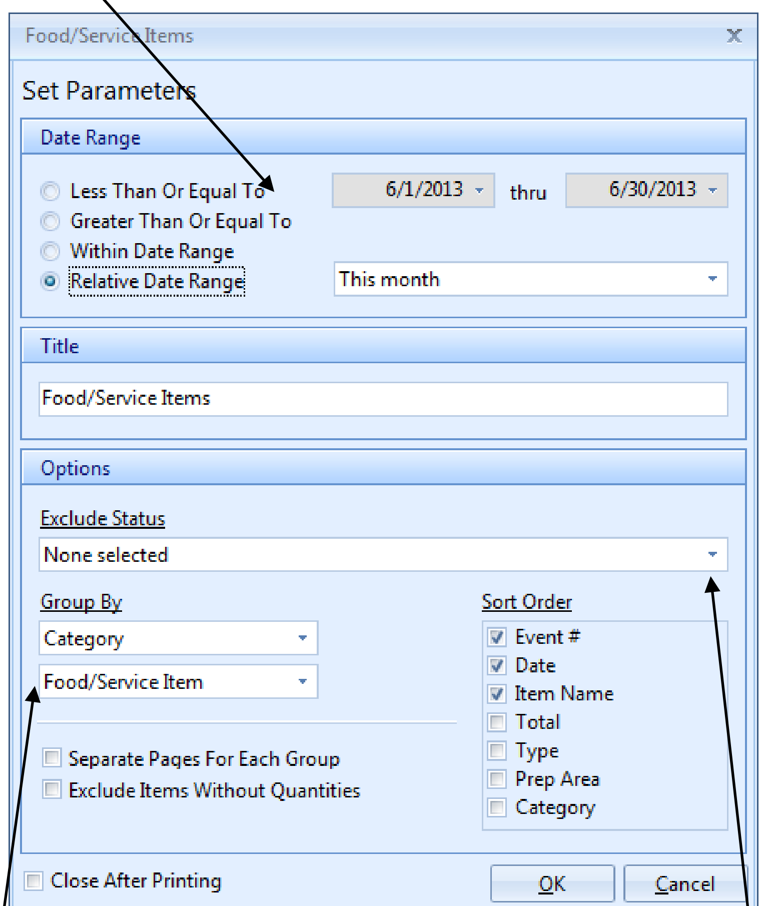
Tracking Food/Service Items in Express and Standard Versions

Can I just get a quick printed report of menu items for a date range?
The Food/Service Items Report is available no matter what version of Caterease you have, and – although not quite as flexible as the query tool on the preceding pages – it is nonetheless very flexible in its own right. This report allows you to track menu items ordered for events during any date range.

Running the Food/Service Item Report

1. Click the **Reports** drop-down menu at the top of the Caterease screen.
2. Choose the **Management** subgroup.
3. Select the Food/Service Items report.
4. Select a specific date or date range to track menu items for, or use the relative date range options. ***Note:*** *Items ordered for events occurring during this date range will be listed on the report.*
5. **[Optional]** Enter a custom title for the report.
6. **[Optional]** Click the down arrow under Exclude Status and select one or more event statuses to be excluded from the report.
7. **[Optional]** Click the down arrow under Group By and choose to group menu items by a particular detail.
8. **Optional]** Click the checkboxes under Sort Order and choose to sort menu items by a particular detail.
9. **[Optional]** Click the checkboxes at the bottom of the window to optionally Exclude Items Without Quantities and to generate Separate Pages For Each Group.

Choose date range



Optionally group items

Optionally exclude event status

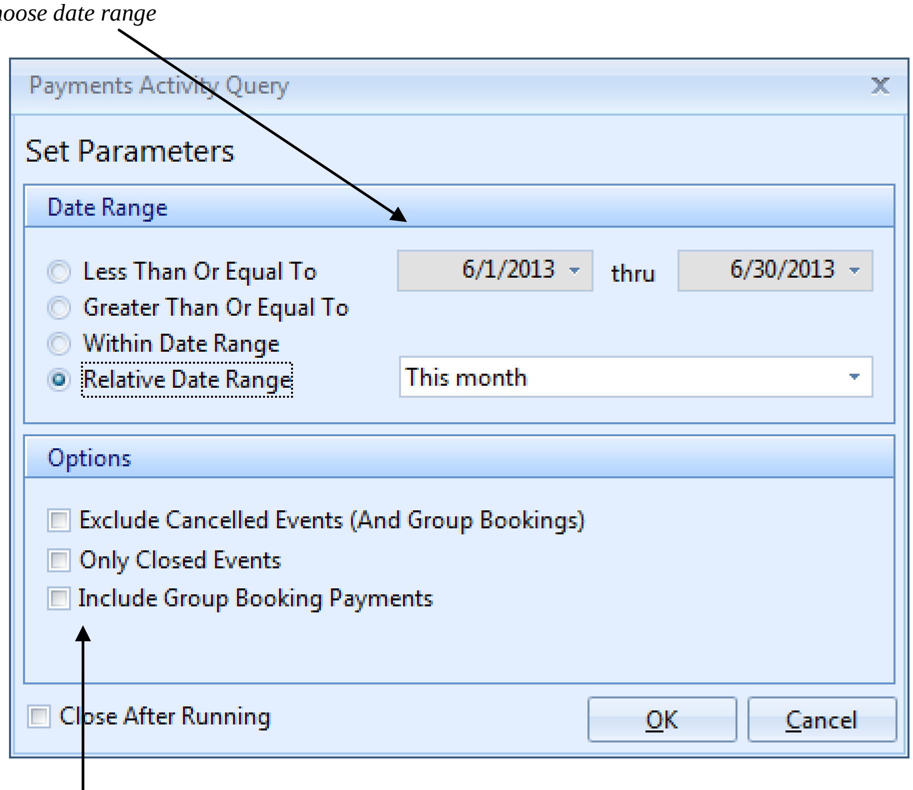
Running the Payments Activity Query

What is a payments activity query?
The powerful Payments Activity Query shows you all payments that have been received on a particular date or during a date range. You can then run various "snap filters" (described previously) to zero in on the exact details you want to see **-** for example, how many payments had a Pay Method of "Credit Card," how many were received for a particular Sales Representative, etc.

Performing a Payments Activity Query

1. Click the **Payments Activity** button on the **Queries** sidebar group.
2. Choose to track payments received before or on a specific date, after or on a specific date, or within a date range.
3. Optionally choose to exclude events or group bookings that have been cancelled, to include only events that have been closed and also whether or not to include group bookings (if you own the Guestrooms Manager to track sleeping rooms).
4. Click **OK** to generate the query.

Choose date range



Choose from various query options

Viewing the Results of a Payment Activity Query

What can I do with the results of my activity query?
After you have customized the details appearing on your results grid – adding and removing columns, sorting and grouping data, as described on previous pages – you can export that data or even print the grid as a custom report.

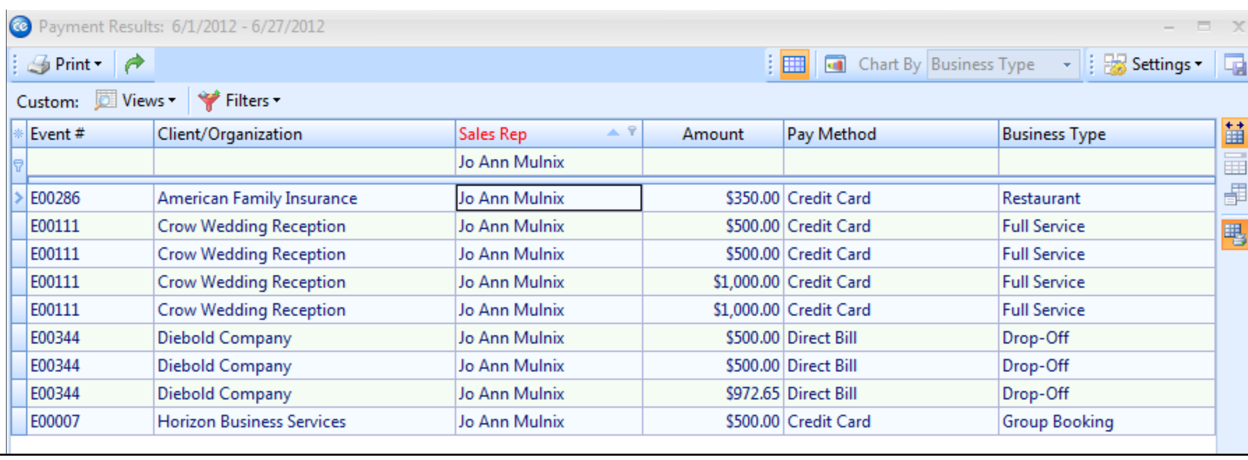
Exporting Grid Data

1. Arrange your grid data as you want it.
2. Click your right mouse button anywhere on the grid.
3. Select **Export Data**.
4. Choose a format to export to.

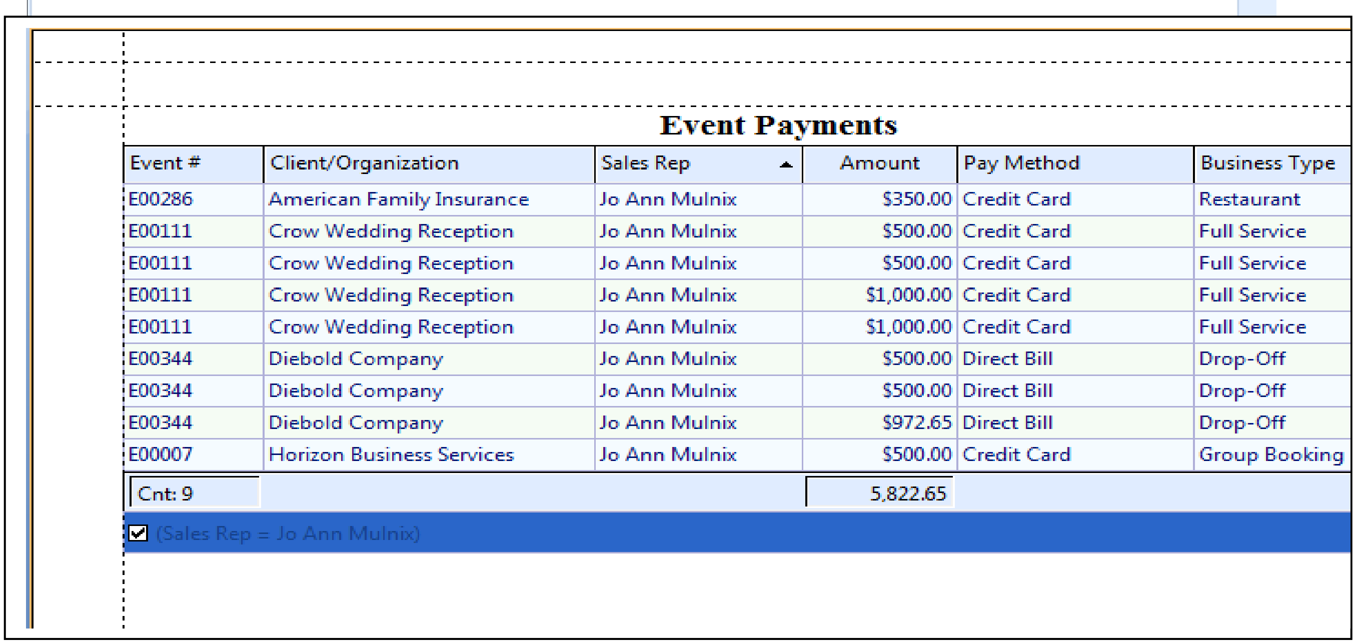
Printing Grid Data

1. Arrange your grid data as you want it.
2. Click the **Print Grid** button at the top right of the results grid.
3. In the Print Preview window that appears, click the **Print** button to send the print to your default printer.

*Click **Format** > **Title** from the Print Preview screen to create the custom title*



Event #	Client/Organization	Sales Rep	Amount	Pay Method	Business Type
		Jo Ann Mulnix			
E00286	American Family Insurance	Jo Ann Mulnix	$350.00	Credit Card	Restaurant
E00111	Crow Wedding Reception	Jo Ann Mulnix	$500.00	Credit Card	Full Service
E00111	Crow Wedding Reception	Jo Ann Mulnix	$500.00	Credit Card	Full Service
E00111	Crow Wedding Reception	Jo Ann Mulnix	$1,000.00	Credit Card	Full Service
E00111	Crow Wedding Reception	Jo Ann Mulnix	$1,000.00	Credit Card	Full Service
E00344	Diebold Company	Jo Ann Mulnix	$500.00	Direct Bill	Drop-Off
E00344	Diebold Company	Jo Ann Mulnix	$500.00	Direct Bill	Drop-Off
E00344	Diebold Company	Jo Ann Mulnix	$972.65	Direct Bill	Drop-Off
E00007	Horizon Business Services	Jo Ann Mulnix	$500.00	Credit Card	Group Booking



Event Payments

Event #	Client/Organization	Sales Rep	Amount	Pay Method	Business Type
E00286	American Family Insurance	Jo Ann Mulnix	$350.00	Credit Card	Restaurant
E00111	Crow Wedding Reception	Jo Ann Mulnix	$500.00	Credit Card	Full Service
E00111	Crow Wedding Reception	Jo Ann Mulnix	$500.00	Credit Card	Full Service
E00111	Crow Wedding Reception	Jo Ann Mulnix	$1,000.00	Credit Card	Full Service
E00111	Crow Wedding Reception	Jo Ann Mulnix	$1,000.00	Credit Card	Full Service
E00344	Diebold Company	Jo Ann Mulnix	$500.00	Direct Bill	Drop-Off
E00344	Diebold Company	Jo Ann Mulnix	$500.00	Direct Bill	Drop-Off
E00344	Diebold Company	Jo Ann Mulnix	$972.65	Direct Bill	Drop-Off
E00007	Horizon Business Services	Jo Ann Mulnix	$500.00	Credit Card	Group Booking
Cnt: 9			5,822.65		

(Sales Rep = Jo Ann Mulnix)

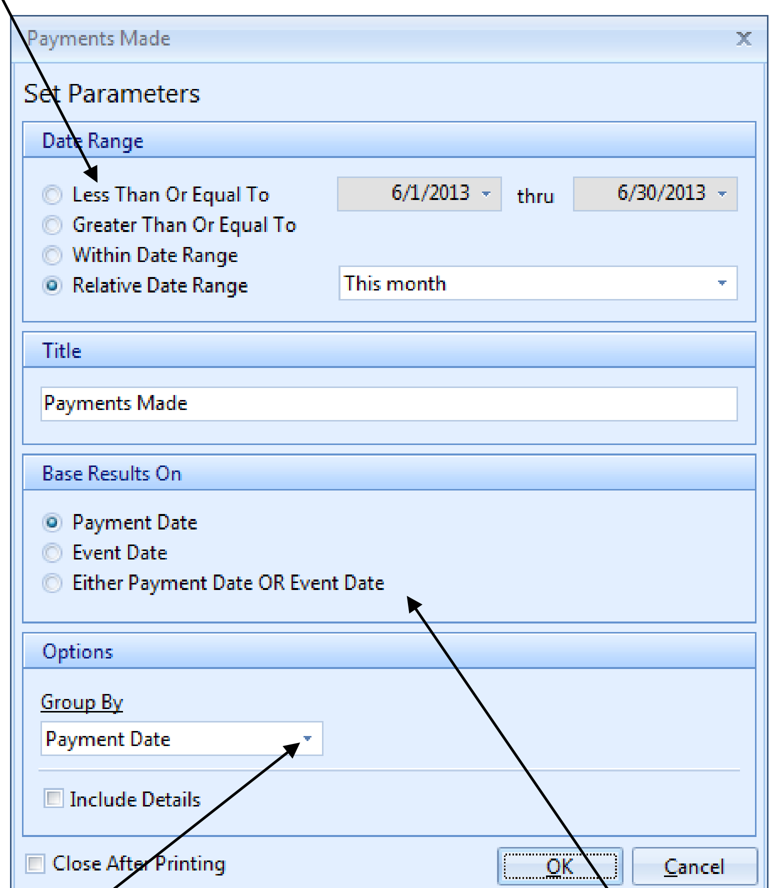
Tracking Payments Items in Express and Standard Versions

Can I just get a quick printed report of payments received during a date range?
Just like the Food/Service Items Report discussed earlier, the Payments Made Report is a quick, easy way to track payment details. Again, it is not quite as flexible as the Activity Query option – however, it is available in all versions of the program.

Running the Payments Made Report

1. Click the **Reports** drop-down menu at the top of the Caterease screen.
2. Choose the **Financials** subgroup.
3. Select the Payments Made report.
4. Select a specific date or date range to track payments for, or use the relative date range options.
   Note: *This date range can reflect the date the payment was received, the date of the corresponding event, or either (see below).*
5. **[Optional]** Enter a custom title for the report.
6. Choose whether you want your selected date range to reflect the dates payments were received, the dates events are held, or either.
7. Choose to group the report results by a particular detail – choose from among Payment Date, Event Date, Pay Method, Sales Rep, Business Type, or Operation.
8. **[Optional]** Click the checkbox at the bottom of the window to optionally include details such as payment comment, check number, card number (last four digits), approval number, etc., from the report.

Choose desired date range



Group Items

Choose Payment Date and/or Event Date

Unit 19: Prospect Manager

Topics covered in this unit include:

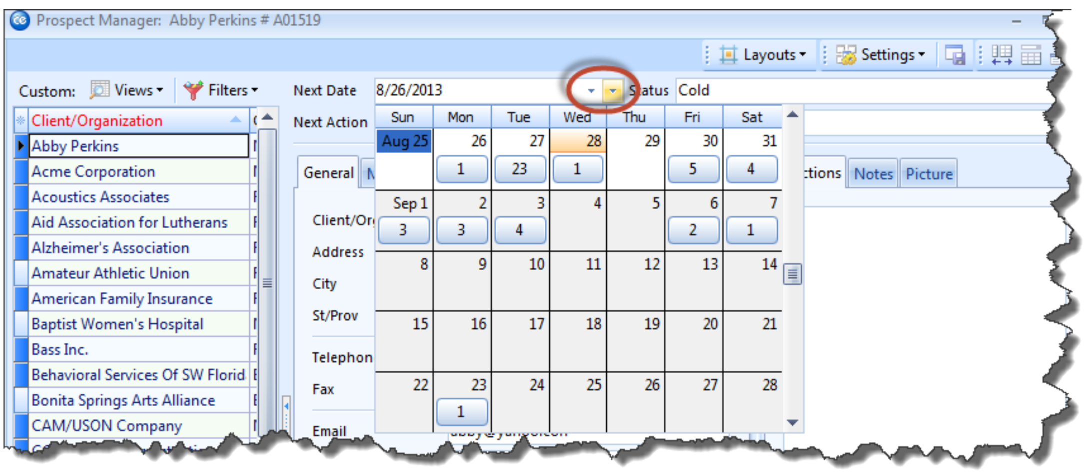
Adding Next Actions and Next Action Dates
Setting a Prospect Status
Establishing a Filter

Using the Prospect Manager Tool

How can the Prospect Manager tool help me manage my leads?
Prospect Manager allows you to maintain a detailed database of leads, separate from your accounts. If you own the Prospect Manager add-in, you are able to schedule the next action you need to take for each of those lead, along with a next action date. In addition, you can set up a filter in your Prospect Manager to instantly show you all prospects with a next action date of today (and, for that matter, your name as a sales rep), all with the click of a button!

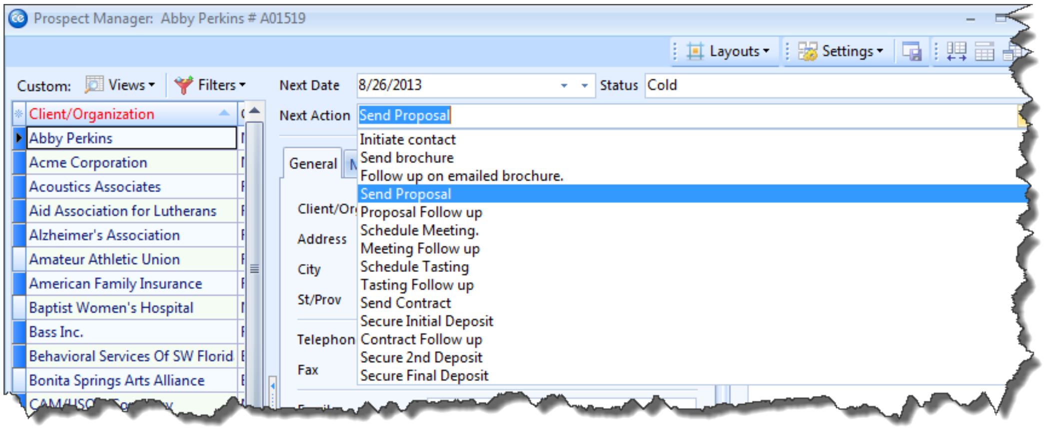
Selecting an Action Date

1. Access Prospect Manager by clicking the **Prospect Manager** button located on the Main Caterease sidebar.
2. Click into the Next Date field, located at the top of the Prospect Manager screen.
3. Type a date into the field, or click down arrow to the right of the Next Date field to access a drop-down calendar.
   Note: *There are two different drop-down calendars from which to choose: The first drop-down calendar (to the immediate right of the Next Date field) drops down the "standard" calendar view; the second drop-down calendar, pictured on the next page, indicates the number of next actions that have been set for a particular date.*



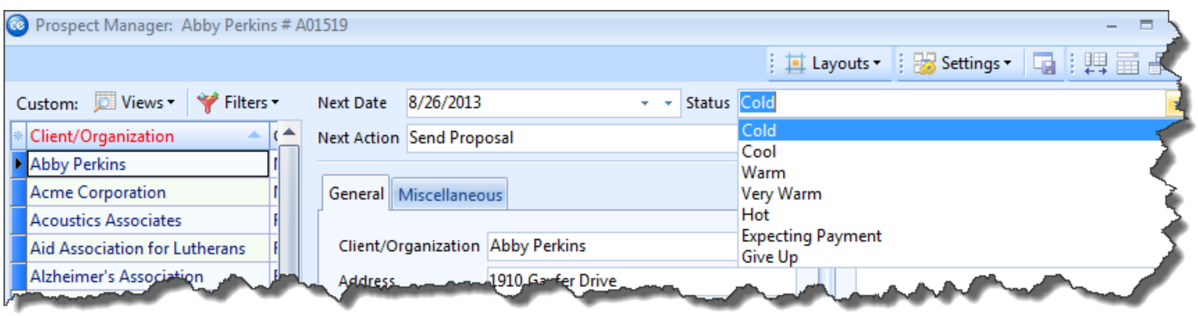
Adding a Next Action (See image on following page)

1. Click the down arrow to the right of the Next Action field and select an option from the customizable quick-pick list.



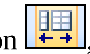
Setting a Prospect Status

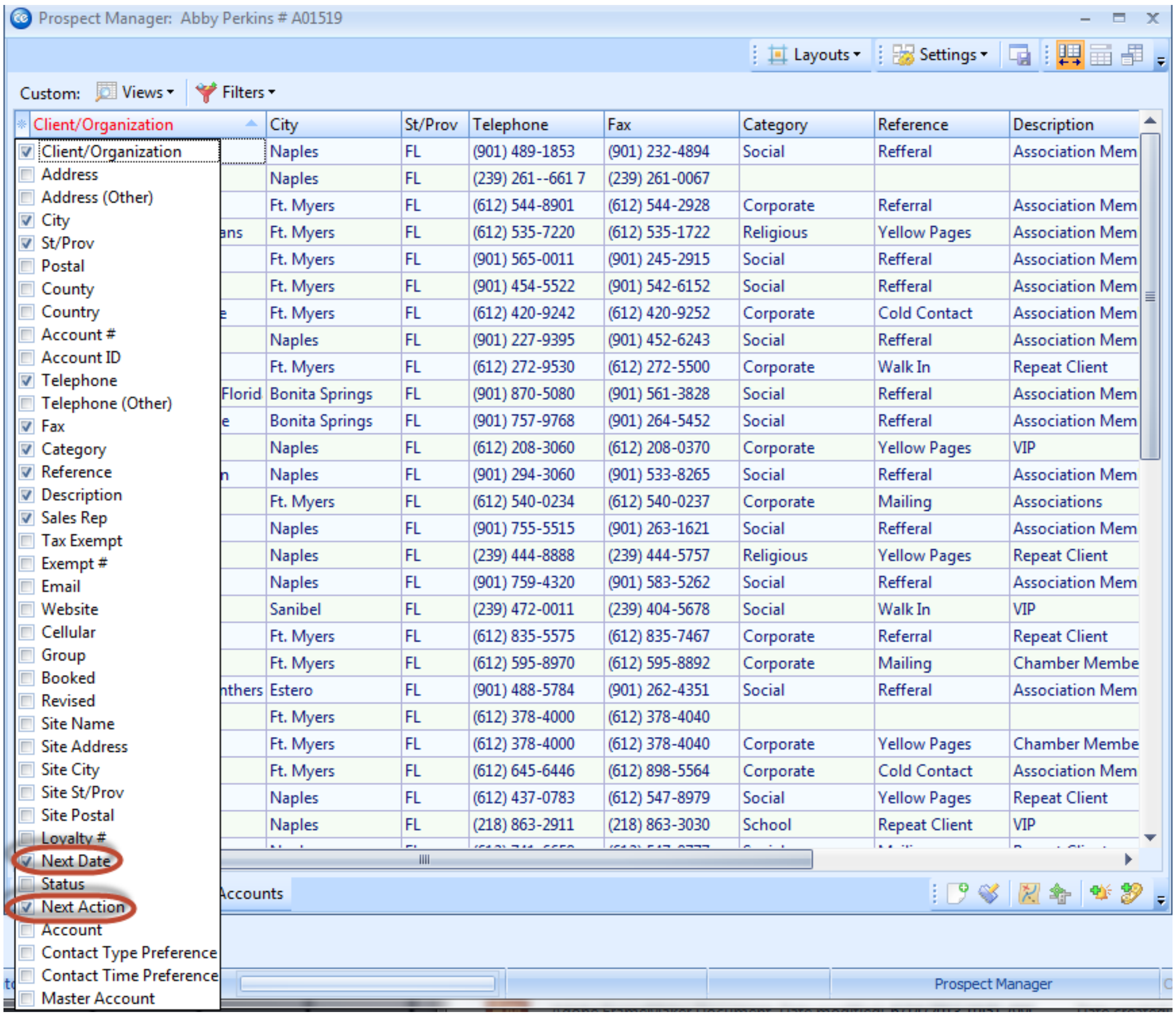
1. From your Prospect Manager main screen, click the <u>Status</u> field, located towards the top right-hand side of the window.
2. Click the down arrow at the far right of the field to choose a status for the prospect from the customizable quick-pick list.
   Note: *Prospects in Prospect Manager can be color-coded, grouped, and otherwise tracked based on a particular status.*



Establishing a Filter

Is there any way I filter out certain records based on next actions or next action dates?
Absolutely! You can instantly (and temporarily) filter out certain records from your grid based on next actions, next action date, follow-up type, etc.

1. From your Prospect Manager screen, click the **Display Full Grid** button , located at the upper right-hand side of the screen.
   Result: *Your Prospect Manager opens in full-grid mode.*
2. Click the **Quick Column Customizing** button , located to the left of the Client/Organization field.
   Result: *A drop-down list of column headings displays.*
3. Click the checkbox next to the desired field name, such as Next Action and/or Next Date.

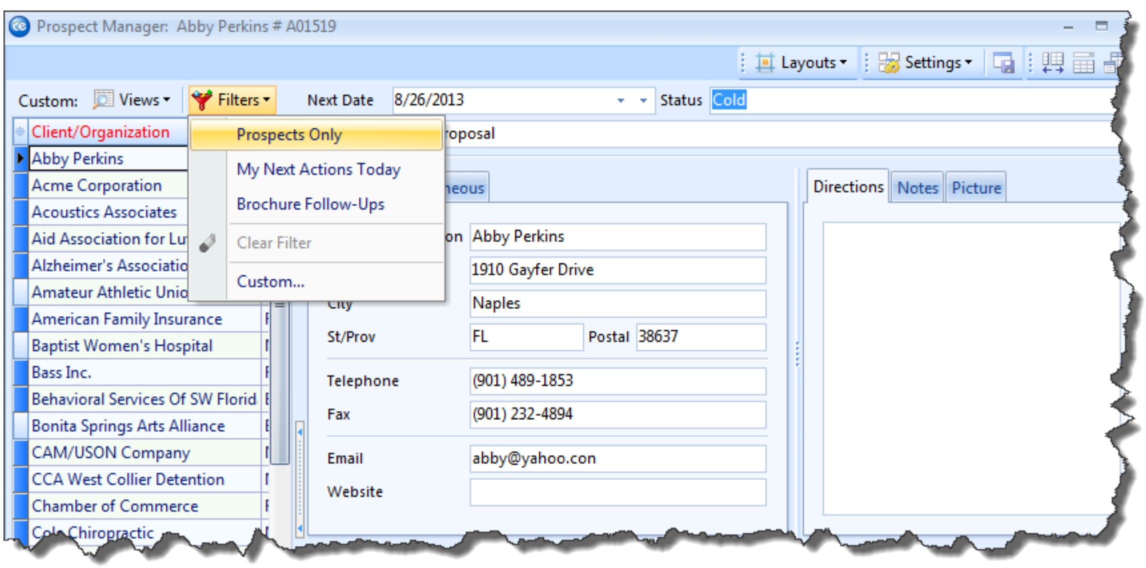


Saving a Filter

1. Click the **Filters** button, located at the top left-hand side of the Prospect Manager screen.
2. Click **Custom**.
   Result: *The Custom Filters window opens.*
3. **[Optional]** Click the **Shared** button at the bottom of the Custom Filters window if you want this custom filter to be shared with other users on your Caterease network.
   Note*: The* ***Local*** *button, selected by default, means this filter will only be available on your computer.*
4. Click the **Add Filter** button .
   Result: *A new filter is added to your list, with the default name New Filter.*
5. Type a name for your new filter into the field.
6. Click the **Save Current Filter** button .
   Result: *Your new filter is saved.*

Retrieving a Previously Saved Filter

1. Click the **Filters** button, located at the upper left-hand side of your main Prospect Manager screen.
   Result: *The list of custom filters you have created display in a drop-down list.*
2. Select the filter from the drop-down list.



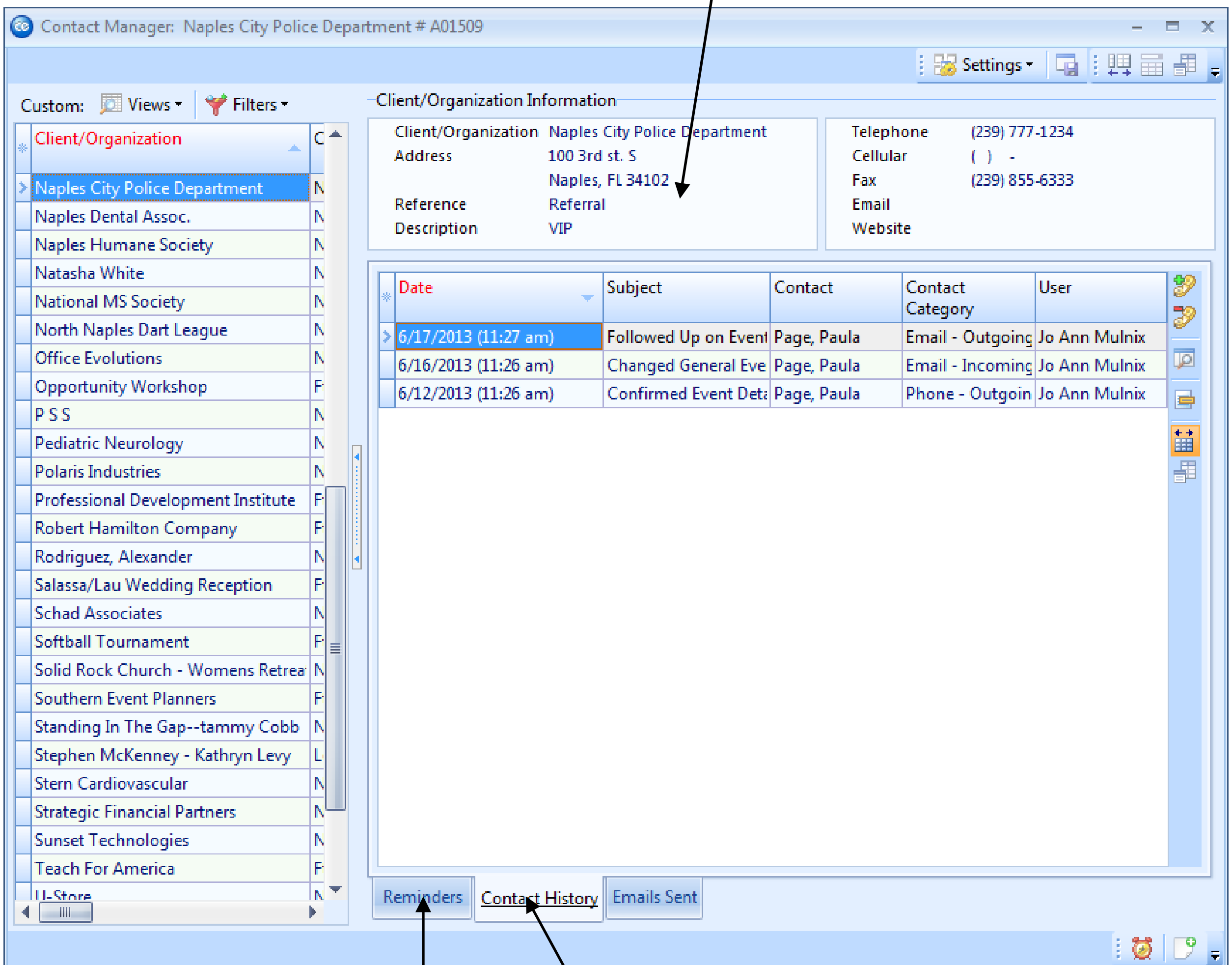
Unit 20: Contact Manager

Topics covered in this unit include:

Reviewing the Contact Manager Screen
Adding Reminders/History Notes in Event Manager
Adding a History Note While Sending a Contract
Creating Reminders/History Notes in Account Manager
Creating Auto Reminders
Managing Current Reminders
Viewing Reminders in a Calendar

Contact Manager

Account information



Click to see reminders for the current account

Click to see Contact History notes for the current account

The Contact Manager Module

The Caterease Contact Manager lets you keep track of all contact you have had with your clients. History notes and reminders can be viewed or created here, and various related prints and reports can be generated.

The Contact Manager features are interwoven throughout the entire Caterease program. You can create history notes or reminders in Event Manager; you can create or even edit them in Account Manager; you can check all current reminders at any time using the corresponding button on the Tools sidebar at the left of the Caterease screen. However, the Contact Manager gives you a clean, easy way to manage all this data quickly.

Adding Reminders through Event Manager

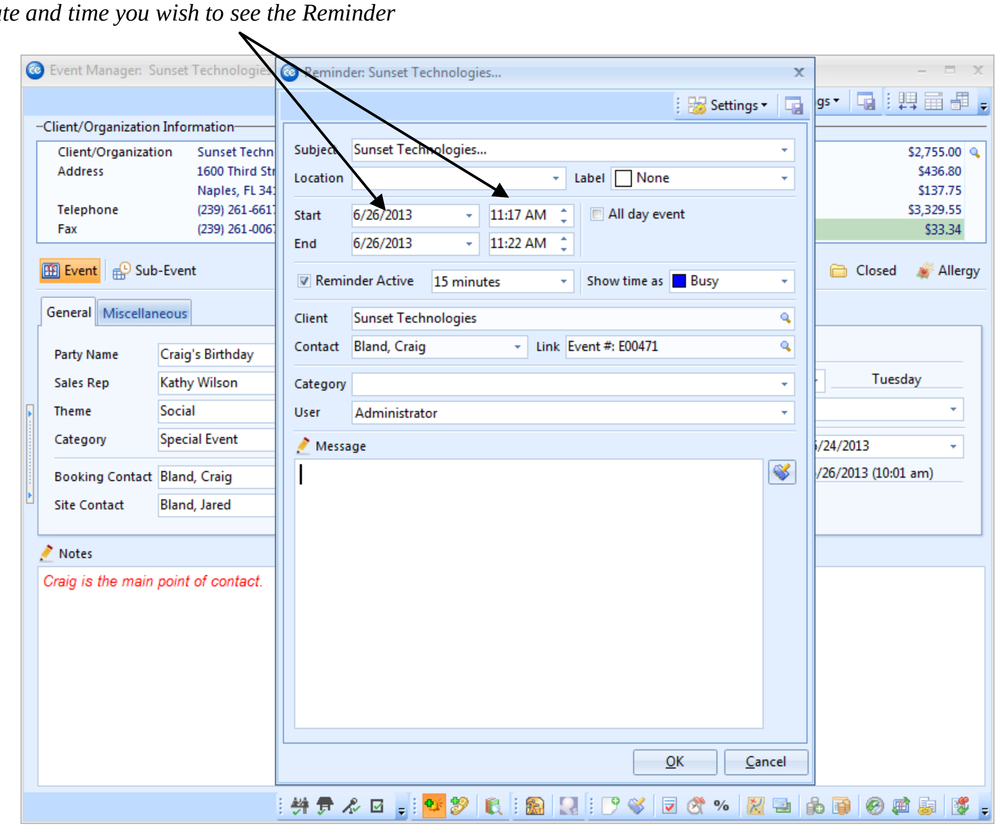
What is a reminder?

If you own the Caterease Contact Manager add-in, you can create reminders to yourself that will pop up on your screen and remind you to do things. These reminders can be created in several places throughout the program, including Event Manager, and can be set so that they only prompt one particular Caterease user or all users.

Adding a Reminder

1. Click the **New Reminder** button , located at the bottom right of the Event Manager screen.
2. Type a <u>Subject</u> for this reminder, or click the down arrow to the right of the field to select items from a quick-pick list.
3. Type a <u>Location</u> to associate with this reminder, or click the down arrow to the right of the field to select items from a quick-pick list.
4. [**Optional**] Assign a <u>Label</u> to the reminder by selecting the appropriate label from the quick-pick list.
5. Select a <u>Date</u> on which the reminder should appear. You can change months on the calendar by clicking the right or left arrows next to the name of the month, or holding your left mouse button down on the name of the month and dragging up or down.
6. Press [**Enter**].
7. Enter an optional reminder <u>Time.</u> This time will be displayed with the reminder, but will not control what time the reminder appears (in other words, a reminder might say you need to do something at "12:00 PM," but it will appear when you first enter Caterease that day.)
8. Press [**Enter**].
9. Click the down arrow to the right of the <u>User</u> field to select the user who should respond to this reminder. Select "All Users" if you wish the reminder to be seen by everybody.
10. Click the down arrow to the right of Category and select an optional category for tracking the reminder. (Examples might include "Urgent," "Follow-Up," etc.)
11. Click the down arrow to the right of <u>Contact</u> and change, if desired, or just accept the default.
12. Click in the <u>Message</u> box and type the reminder action (i.e., what you will be reminded to do).
13. When finished, click **OK**.

Enter the date and time you wish to see the Reminder



Adding Contact History through Event Manager

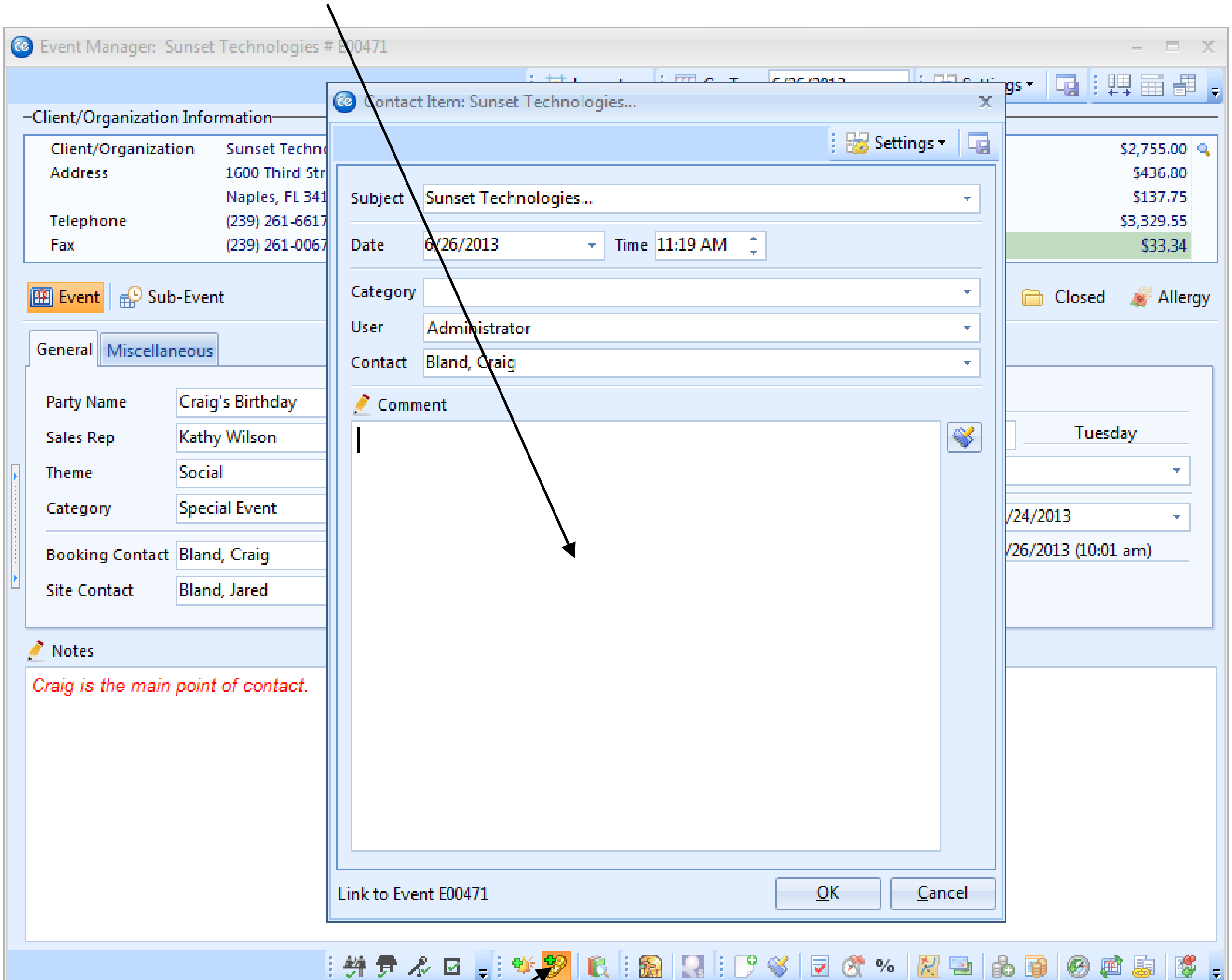
What's a contact history note?

A Contact History Note is a written (or in this case, typed) record of some action you did or conversation you had related to a certain client. For example, if a customer calls to change the menu for their order, you may want to make a record of that call for future reference. Or if you make a few cold calls to try to build some business, you might note that as well. These history notes exist for your reference, can be referenced either on screen or in reports, and can be tracked either by category ("Menu Change," "Cold Call," etc.), or by customer name.

Adding a History Note

1. Click the **New Contact History Item** button , located at the bottom of the Event Manager screen.
2. Type as desired in the Comment text box.
3. Click in the Subject, Date, Time, User, Category, or Contact field and edit as desired.
4. When finished, click **OK**.

*Enter history note under **Comment***

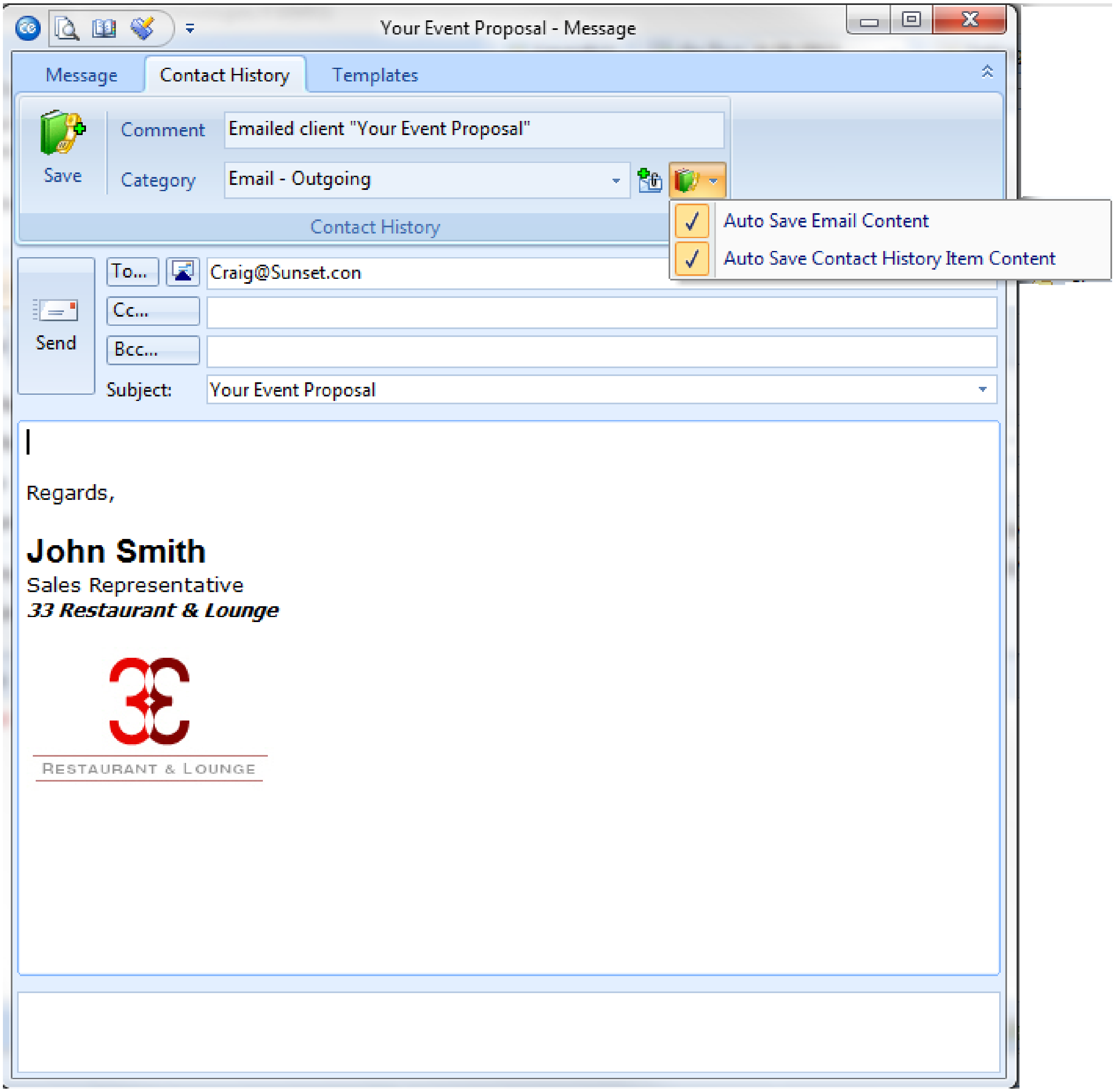


Add Contact History Note

Contact History: Auto-Save (See image on following page)

Am I able to keep a record of proposals and contracts I send via e-mail?
Yes! The Contact History window allows you to save contact history.

1. Click the **E-mail** button at the top of the Event Manager screen.
   Note: *This button is also available from any Print Preview screen, and will automatically attach whatever print you are previewing (Contract, Billing Statement, etc.), to the outgoing e-mail.*
2. In the To… field, type the e-mail address of the person you want to send your e-mail to, or click the **Address Book** button to access a list of e-mail addresses for all contact people associated with this account.
   Note: *You can also access the list of e-mail addresses for this prospect by clicking the word* To... *at the left of the field. Note that this list is not your address book from Outlook; rather, it is the list of e-mail addresses you've entered into Caterease for the contact people of this e-mail recipient*
3. [**Optiona**l] In the Cc field, type the email address of the carbon copy recipient here (separate multiple recipient addresses by semicolons).
4. [**Optional**] In the Bcc field, type the email address of the blind carbon copy recipient here (separate multiple recipient addresses by semicolons).
5. In the Subject… field, type a subject for your e-mail, or click the down arrow to the right of the field to access a custom quick-pick list.
6. Click into the large white text block in the window.
7. Type a message as the body of your e-mail.
   Note: *If you own the Marketing Tools package, you can* use one of your custom merge letters *as the body of your e-mail. These letters will automatically merge in information from the current prospect, including name, salutation, current date, etc.*
8. **[Optional]** Format the text of your e-mail using the **Format** toolbar on your e-mail window.
9. **[Optional]** Click the **Attach** button at the top of the e-mail window and choose ***File*** to attach a file. Choose **Print** to attach a print.
   Note: *This step will open a standard Windows browser window, where you can select a file or print to attach to the e-mail. Attached files appear in the small pane at the bottom of the E-mail window.*
10. Click the **Contact History** tab. You can elect to **Auto-Save E-mail** content and **Contact History Item Content** by clicking their respective checkboxes from the **Auto Save in Contact Manager** button .
11. When finished, click **Send**.
    Result: *The e-mail is sent through your Outlook program, and any files you have attached are exported.*


Your Event Proposal - Message
Message
Contact History
Templates
Save
Comment
Emailed client "Your Event Proposal"
Category
Email - Outgoing
Contact History
Auto Save Email Content
Auto Save Contact History Item Content
To...
Craig@Sunset.con
Cc...
Bcc...
Send
Subject:
Your Event Proposal
Regards,
John Smith
Sales Representative
33 Restaurant & Lounge
Restaurant & Lounge

Creating Auto-Reminders

What is an auto reminder?
Let's describe this with an example: say it is your company protocol when you book a new event that you always must get a confirmed guest count 48 hours in advance of the party. You could create an automatic reminder that says, "Call to confirm guest count," and have it automatically created whenever you book a new event. Furthermore, you can set this reminder to flag you "two days" before the event date, as necessary. You can even set reminders to prompt you a certain number of days from the date you book the party, rather than the event date itself.

Accessing Auto-Reminders

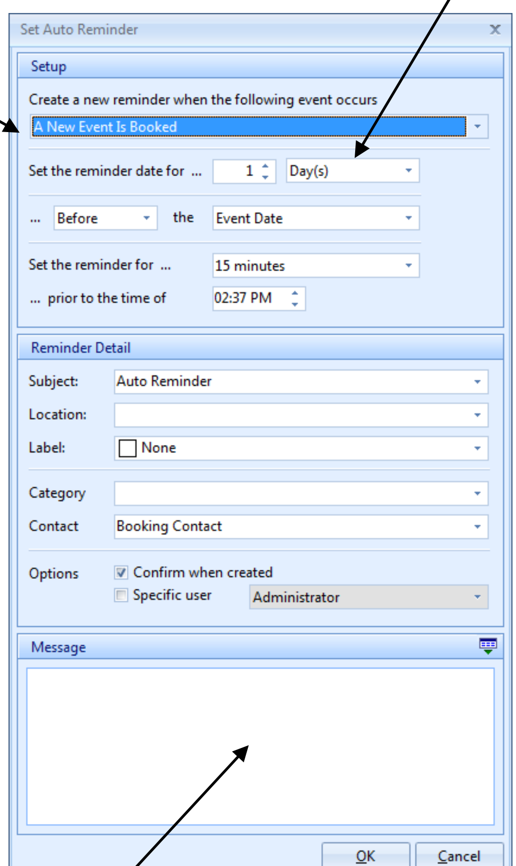
1. Click the **Contact Manager** button on the **Main** sidebar.
2. Click the **Automatic Reminders Setup** button , located at the lower right-hand side of the screen. ***Note:*** *You may also access this feature from* ***Administration*** *>* ***Options*** *>* ***Automatic Reminders Setup****.*

Adding an Auto-Reminder

1. Click the green plus sign at the top of the Automatic Reminders form.
2. Choose an action to trigger the creation of the reminder.
3. Set a date for the reminder to appear, relative to the Event Date, the Booked Date, or the Revised Date.
4. Enter optional reminder information, such as a time, category, or contact person.
5. Enter the text of the reminder that will prompt you.

Choose what action will create the auto-reminder

Choose when reminder should appear



Enter the reminder text in the Message text box

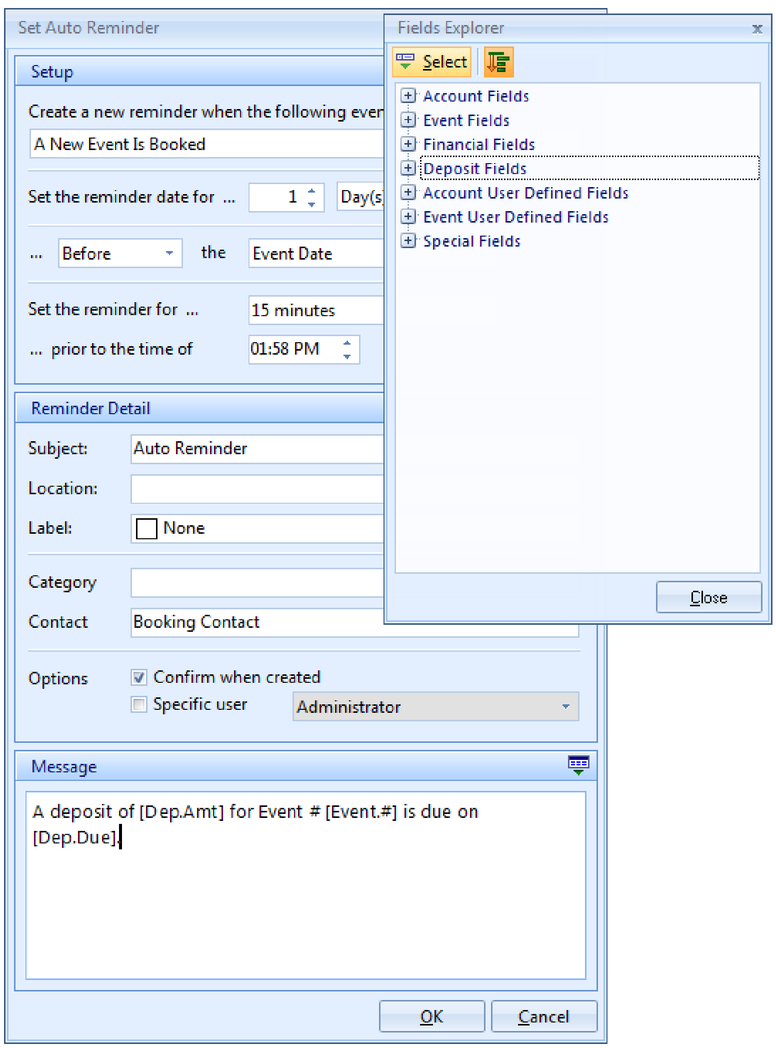
Inserting Merge Fields into an Auto-Reminder Message

Create a custom auto-reminder by adding dynamic merge fields into your message.

1. Click in the Message text box.
2. Click the **Insert Fields** button at the top right-hand side of the message window.
3. Click the plus sign to the left of a particular category of fields (e.g., Event Fields, Financial Fields, etc.). ***Result:*** *That category opens to show all related fields.*

   Note*: As an option, click the* ***Full Expand*** *button to expand all categories of merge fields at once.*
4. Select a field and insert it in one of the following ways:

- Double-click the selected field to drop it in the current cursor position (where your cursor is currently blinking).
- Hold your left mouse button down onto the desired field, drag it into any position in the text block, and release.
- Click the **Select** button to drop the field into the current cursor position.



Managing Current Reminders

Viewing Current Reminders

1. Click the **Tools** sidebar on the left of the Caterease screen.
2. Click **Active Reminders**. These are the current reminders for the Caterease user who is currently logged into this machine.

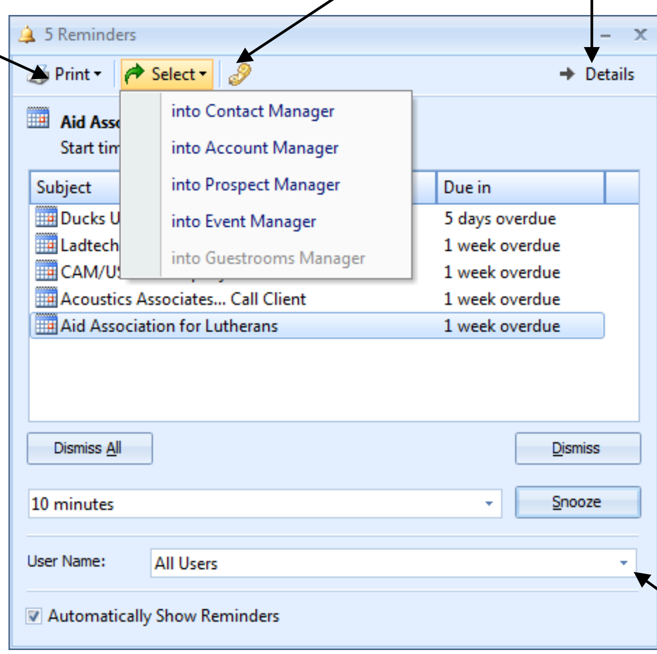
Selecting Reminders

1. Click any reminder on the Active Reminders form.
2. Click the **Select** button at the top of the form.
3. Choose to select the reminder using the following guidelines:
   - *Into Account Manager* – This option will open Account Manager on the account associated with this reminder.
   - *Into Event Manager* – This option will open Event Manager on the event that this reminder is linked to. If this option is not available when you click **Select**, this means that the highlighted reminder is not linked to any existing event.
   - *Into Contact Manager* – This option opens Contact Manager and positions you on the account associated with this reminder.
   - *Into Prospect Manager*—This option opens Prospect Manager and positions you on the account associated with this reminder.
4. Click **Yes** to confirm your choice.

Click Print to print your current reminders

Click to view reminder details

Click one time on the phone icon to generate automatic History Notes



You may choose to Snooze, Dismiss, or Dismiss All reminders

If you are the Caterease administrator, you can choose whose reminders you see

Viewing Reminders in a Calendar

Can I see my reminders in a calendar display?
Absolutely! You can see reminders in a day-at-a-glance calendar, a week-at-a-glance, a custom work-week-at-a-glance or a month-at-a-glance display, just like you would in Outlook. In fact, you can synchronize your Caterease calendar display with your Outlook calendar instantly!

Displaying Reminders in Sub-Events

1. Click the **Scheduler** button on the **Tools** sidebar group to open the Scheduler.
2. Click the **Display** button from the middle of the Scheduler window. Select **Reminders.**

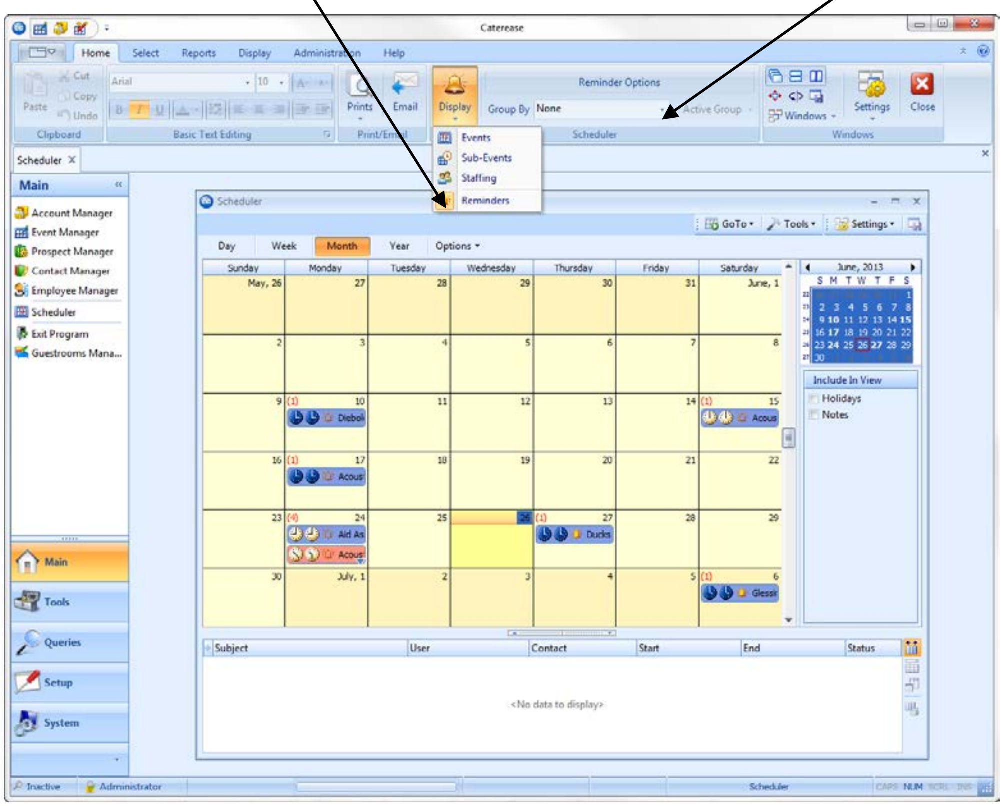
Grouping Reminders by User, Category or Other Detail

1. In the Reminders calendar, click the down arrow next to **Group By**, at the top left of the window.
2. Choose User, Category or other detail.
   Note: *Administrators are able to view reminders for all users. If you are logged in as a specific user, only your reminders will appear in the calendar display.*

Synchronizing with Outlook

1. In the Reminders calendar, right-click anywhere on the screen and select **Export/Synchronize to Outlook.**
2. Choose to export within a date range or a relative date range.
3. Choose to export Active Reminders Only, New Reminders Only, or both.
4. When finished making your selections, click **OK**.

*Click the **Reminders** button* *Click the down arrow to group the calendar by reminder fields*



Unit 21: Marketing Tools

Topics covered in this unit include:

Accessing Marketing Tools
Creating a New Merge Document
Inserting Images into Merge Documents
Inserting Tables into Merge Documents
Inserting Dynamic Merge Tables

Using Marketing Tools

What do I need the Marketing Tools Package for?

The Caterease Marketing Tools package gives you the ability to create any number of dynamic merge letters, envelopes, and labels. In case you don't know what a merge letter is, it is basically this:

Dear (So-and-So),
You have (a certain party) in (a certain room) at (a certain time) on (a certain date).

All of the information in parentheses would dynamically merge in data from specific orders. Therefore, one letter that you type one time will look completely unique for each separate order.

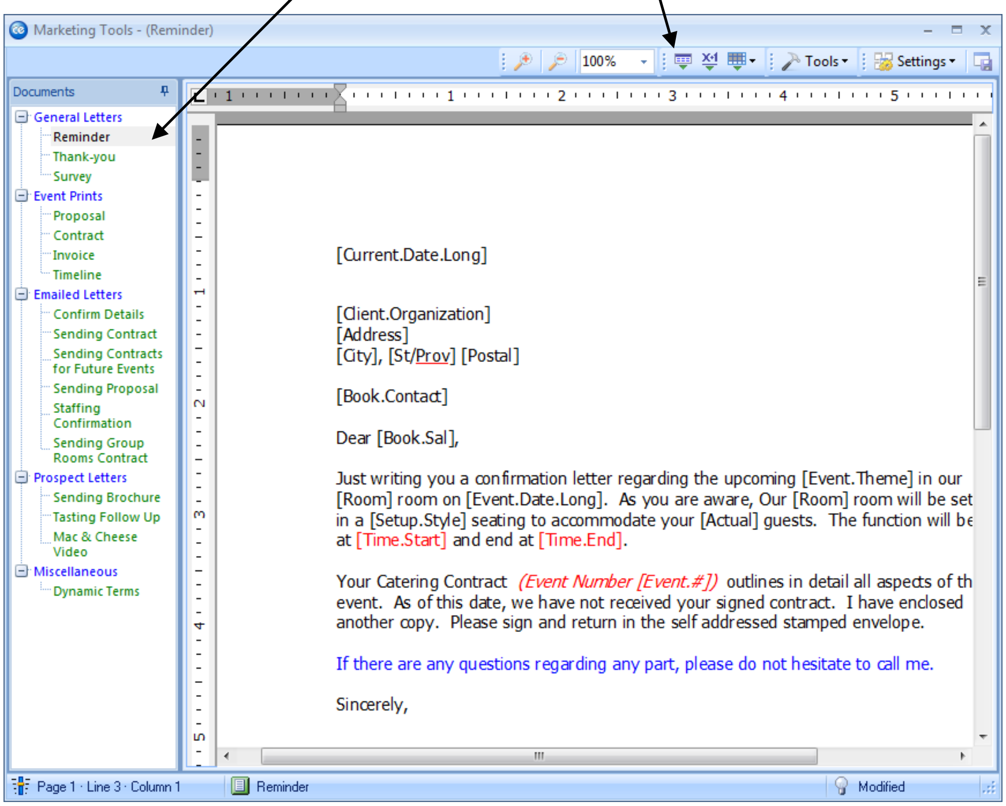
Adding Merge Documents

1. Click the **Marketing Tools** button on the **Setup** sidebar along the left-hand side of your screen.
2. Click the **Add Record** button , located on your Main Caterease toolbar at the top of the screen.
3. Type a name for your new document and press your **[Enter]** key.
4. Click in the main text block of the Marketing Tools form and type the body of your document as desired. Insert fields anywhere in your document using the following steps:
5. Place your cursor where you would like the merge field inserted.
6. Click the **Insert Merge Fields** button , located at the top right of the Marketing Tools form.
7. Click the plus sign to the left of the group of merge fields you wish to access.
8. Select the field you want to insert, and either double-click it or drag it and drop it into your document.
9. Format your document's text using the **Format** toolbar at the top of your Caterease screen.

Tip: You can optionally insert tables anywhere in your letter by clicking the **Insert Merge Tables** button 

Documents are listed on the left side of screen

*Click **Insert Merge Fields** button to add merge fields*



Inserting Images into Merge Documents

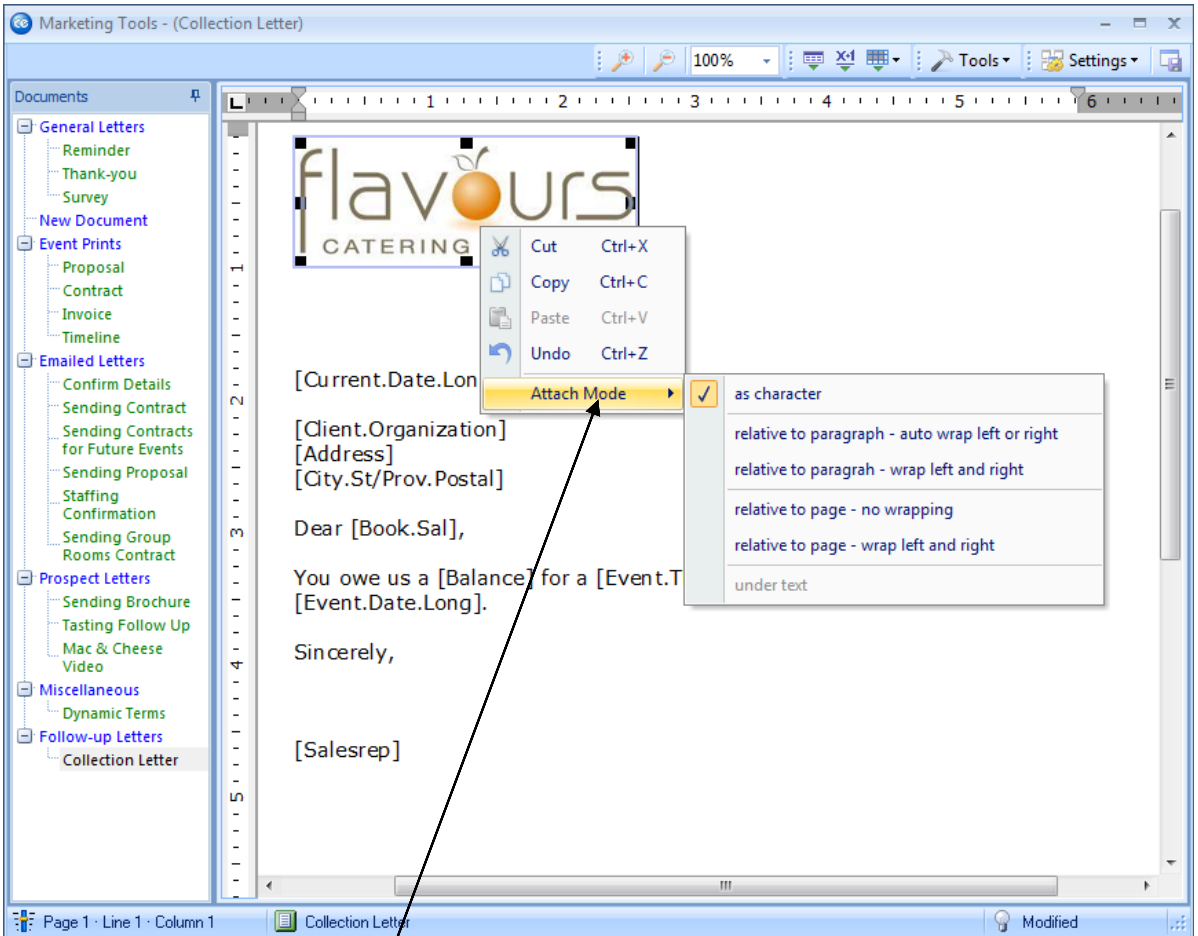
Can I put our logo at the top of our custom merge documents?
You can put your logo – or any other image – anywhere you want! You can even choose to insert images as watermarks in the background of your print.

Inserting an Image

1. Click in your document to place your cursor where you want the image to appear.
2. Right-click and select **Insert Image**. Alternatively, you may click the **Insert** button  and select **Insert Image.**
3. Browse to your image, select it, and click **Open**.
   Result: *The selected image is inserted into your document.*
   Note: *As a default, the image is inserted as a "character" (see Attach Modes, below). This means that it will move as other text moves, and you can use the Format toolbar to align it (left, center, right), among other things.*

Changing the Attach Mode of an Image (See image on following page)

1. Right-click an image in your document.
   Result: A pop-up menu appears.
2. Select **Attach Mode**.
3. Choose from the following options:
   - **As Character**
     This is the default mode, where the image acts as any other character in the document and moves and wraps with the text around it.
   - **Relative to Paragraph - Auto Wrap Left or Right**
     Attaches the image to a paragraph. Drag the image to any paragraph, and drag it left or right on the screen. If the image is closer to the right side of the page, text will wrap to its left (and vice versa).
   - **Relative to Paragraph - Auto Wrap Left AND Right**
     Attaches the image to a paragraph. Drag the image to any paragraph, and drag it left or right on the screen. Text will automatically wrap on both sides of the image.
   - **Relative to Page - No Wrapping**
     Attaches the image to the page. You can drag the image to any position you want. Text will not wrap.
     Note: *Use this mode with a faded image to create a watermark effect. (You'll want to choose the "Behind Text" option, below).*
   - **Relative to Page - Wrap Left and Right**
     Attaches the image to the page. You can drag the image to any position you want, and text will automatically wrap on both sides as necessary.
   - **Behind Text/Under Text**
     Places the image behind the text or under the text on the page as you drag it. Use this in conjunction with "Relative to Page - No Wrapping " (above) to create a watermark effect.
     Note: *To select an image set "Behind Text," hold your* ***[Ctrl]*** *key down as you click the image.*



Right-click image to change attach mode.

Inserting Tables into Merge Documents (See image on following page)

What if I want details in my letter to be organized into nice, straight rows and columns?
Just like in your favorite word processor, tables are incredibly useful for organizing information in Caterease Marketing Tools. Furthermore, you can use borderless tables to arrange information in straight rows and columns – all while keeping the document free of any graphic line work.

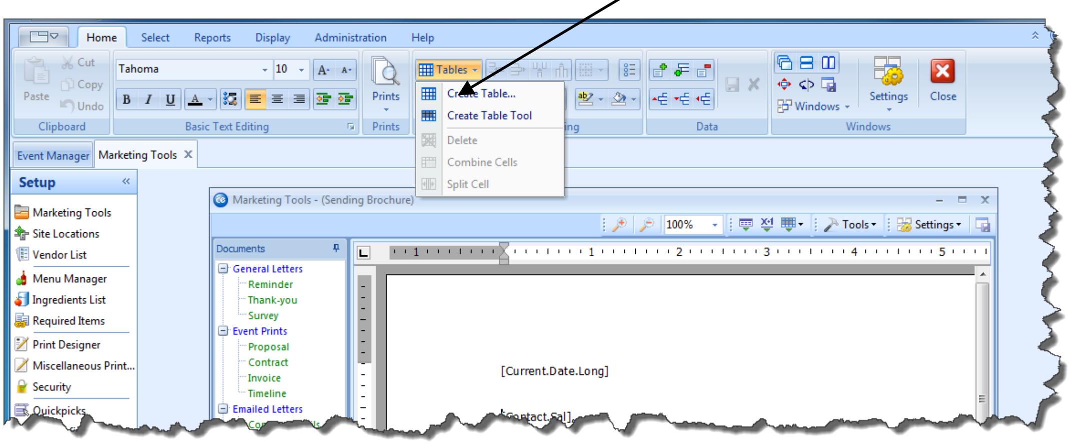
Inserting a Table

1. Click in the document where you would like the table to be inserted.
2. Click the **Create Table** button, located on the **Home** ribbon tab at the top of the screen.
   Result: *The Insert Table window appears.*
3. Create a table by setting the following options:
   - **Number of Columns**
     Set the number of columns you want in your table.
   - **Number of Rows**
     Set the number of rows you want in your table.
   - **Alignment**
     Select whether you want the table to appear on the left side of the page, in the center or on the right.
     Note: *If the width of your table is 100% (see Width, below), then the table will take up the entire width of the page.*
   - **Border**
     Choose whether or not you want borders around the cells of your table. ***Note:*** *Borders can be removed after the table has been inserted, if necessary.*
   - **Width**
     Set the width for your table as a percentage of the page you are placing it on.
4. When finished, click **OK**.
   Result: The table is inserted at the current position of your mouse pointer.
   Note: *As an alternative, you can click* ***Tables*** *>* ***Create Table*** *button, move your mouse to indicate the number of columns and rows you want in your table, then click again to create it.*

Modifying a Table

1. Click your cursor in the cell of the table at the point you want to make a modification (or highlight multiple cells).
2. Click a button in the toolbar located along the right side of the Marketing Tools form to optionally delete the table, split cells, combine cells, insert a row, delete a row, insert a column, delete a column, or add/remove borders.

Use the Quick Access Toolbar item "Tables" to create and modify tables



Inserting Dynamic Merge Tables

Can I include specific sub-event details on my custom prints?
Specific sub-event details, such as room and time information, menu items, staffing etc., can be inserted anywhere in your merge documents using powerful merge tables. You can choose what specific information appears where – even optionally nesting merge tables within other tables for a split-page or other creative design.

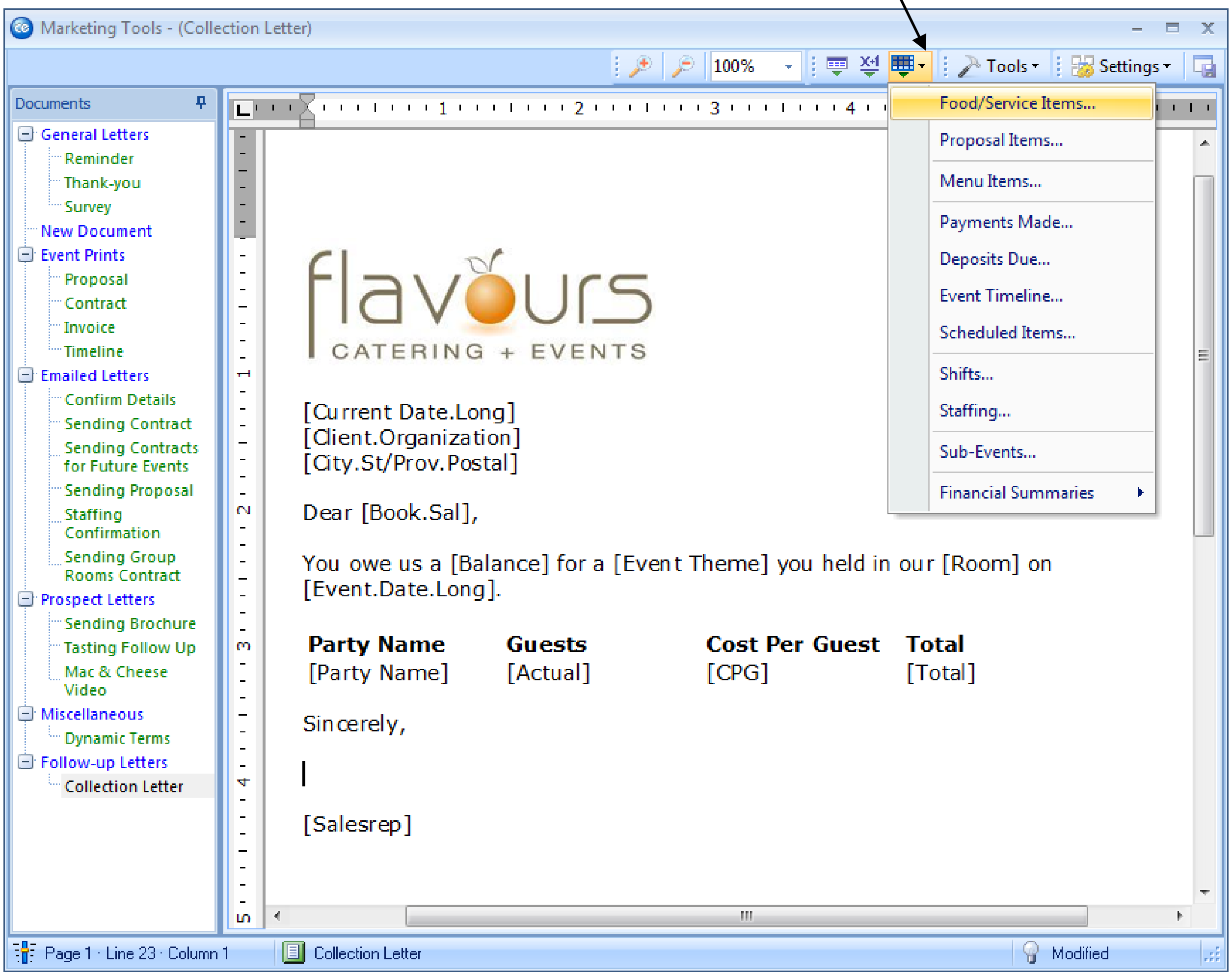
Inserting a Merge Table

1. Click in a merge document to place your cursor where you want the merge table to be.
   Note: *You can click inside other tables (see Inserting Tables on the previous page) to arrange tables side by side on a page.*
2. Click the **Insert Merge Table** button at the top of the Marketing Tools window.
3. Choose a specific merge table based on the following descriptions:
   - **Food/Service Items**
     Fields to choose from include item Name, Description (formatted or unformatted), Picture, Time, Category, Prep Area, Unit, Item ID, Acct Code, Comment, Cost, Qty, Total, Recipe (formatted or unformatted), Notes (formatted or unformatted), Modifications (formatted or unformatted), vendor, Price, Returned.
   - **Proposal Items**
     Fields to choose from include Name Descriptions (formatted or unformatted), Picture, Category, Time, Prep Area, Unit, Item ID, Acct Code, Comment, Cost, Price Qty, Total.
   - **Menu Items**
     Fields to choose from include Name, Description (formatted or unformatted), Recipe (formatted or unformatted), Picture, Type, Category, Prep Area, Unit, Item ID, Acct Code, Comment, Vendor, Cost, Price, Menu.
   - **Payments Made**
     Fields to choose from include payment Date, Amount, Pay Method, Card Type, Card Number, Comment, Expires.
   - **Deposits Due**
     Fields to choose from include Due Date, Due Amount, Comment, Paid, Pay Date, Pay Amount.
   - **Event Timeline**
     Fields to choose from include Date, Time, Item, Notes (formatted and unformatted), **Category**
   - **Scheduled Items**
     Fields to choose from include Date, Start, End, Setup, Tear Down, Name, Type, Category, Comment, Notes (formatted and unformatted), Picture.
   - **Shifts**
     Fields to choose from include Position, Date, Start, End, Hours, Uniform, Category, Comments, Price, Required, Booked, Confirmed, Total.
   - **Staffing**
     Fields to choose from include Employee, Position, Date, Start, End, Uniform, Category, Telephone, Cellular, Email, Confirmed, Confirmed On.
   - **Sub-Events**
   - Fields to choose from include sub-event Description, Type, Times, Date, Planned Guests, Actual Guests, Guaranteed Guests, Room, Setup Style, Site Name, Site Address, Site City, Site State/Prov, Site Directions (formatted or unformatted), Site Website, Room Charge, Delivery Charge, Comments (formatted or unformatted).

(*Continued on next page.)*

- **Food/Service Items Financial Summaries**
  Group totals of menu items grouped by item Type or item Category.
- **Proposal Items Financial Summaries** Group totals of menu items grouped by item Type or item Category.
- **Summary Totals Financial Summaries**
  List financial totals including Adjustment, Delivery Charge, Room Charge, Discount, Subtotal, Gratuity, Service Charge, First Tax, Second Tax, Third Tax, Total Tax, Total, Paid, Balance, Cost, Profit.

Insert Merge Table *button*



Unit 22: Using the Print Designer

Topics covered in this unit include:

Accessing the Print Designer
Adding a New Print
Customizing the Header
Customizing Text Blocks in a Print
Formatting Food/Service Items in a Print
Advanced Print Settings
Using the Miscellaneous Prints Designer

Using the Print Designer

What is the Print Designer?

Caterease gives you the remarkable flexibility to modify or completely recreate your prints. You can rearrange data on a print, insert company logos or even add text in any font, color, or size. Any changes made to new or existing prints is done through the Caterease Print Designer.

Accessing the Print Designer

1. Click the **Setup** sidebar area on the left-hand side of your screen.
2. Click the **Print Designer** button.

Adding a New Print

1. Click the **Add Print** button, located at the top left-hand side of the Print Designer window.
   Result*: A confirmation window opens.*
2. Click **Yes** to confirm your choice.
   Result*: The Select Print Layout window opens.*
3. Click a layout on the left-hand side of the window to select it.
4. Click **OK**.
   Result: *A new print is added, and the Title field is highlighted for you to type in a new print title.*
5. Type a title for your new print.
6. Press [**Enter**] to save your changes.

Customizing the Header

1. Click the **Edit Header** button, located on the top right-hand side of the screen.
   Note: *There are three separate panes within the header window. Each pane can be edited by following the steps below.*
2. [**Optiona**l] Stretch or shrink any pane by holding your left mouse button down on the inside frame and dragging it.
   Note: *You can also set all three panes to equal widths by clicking the* ***Tools*** *button and choosing* ***Set Equal Widths*** .
3. Click on any pane and type as desired, using the toolbar at the top of the window to format text, to center or right-justify, etc.
4. [**Optional**] Insert images into the header, as described previously.
5. [**Optional**] Insert merge fields to dynamically merge information from the event, such as the event number, revision date, etc., as described below.
6. [**Optional**] Click the hyperlink field at the bottom of the header window and enter a URL (web address) to attach to this area of the print.
   Note: *When you e-mail this print, the recipient can click any part of this header and be sent to the designated web address.*

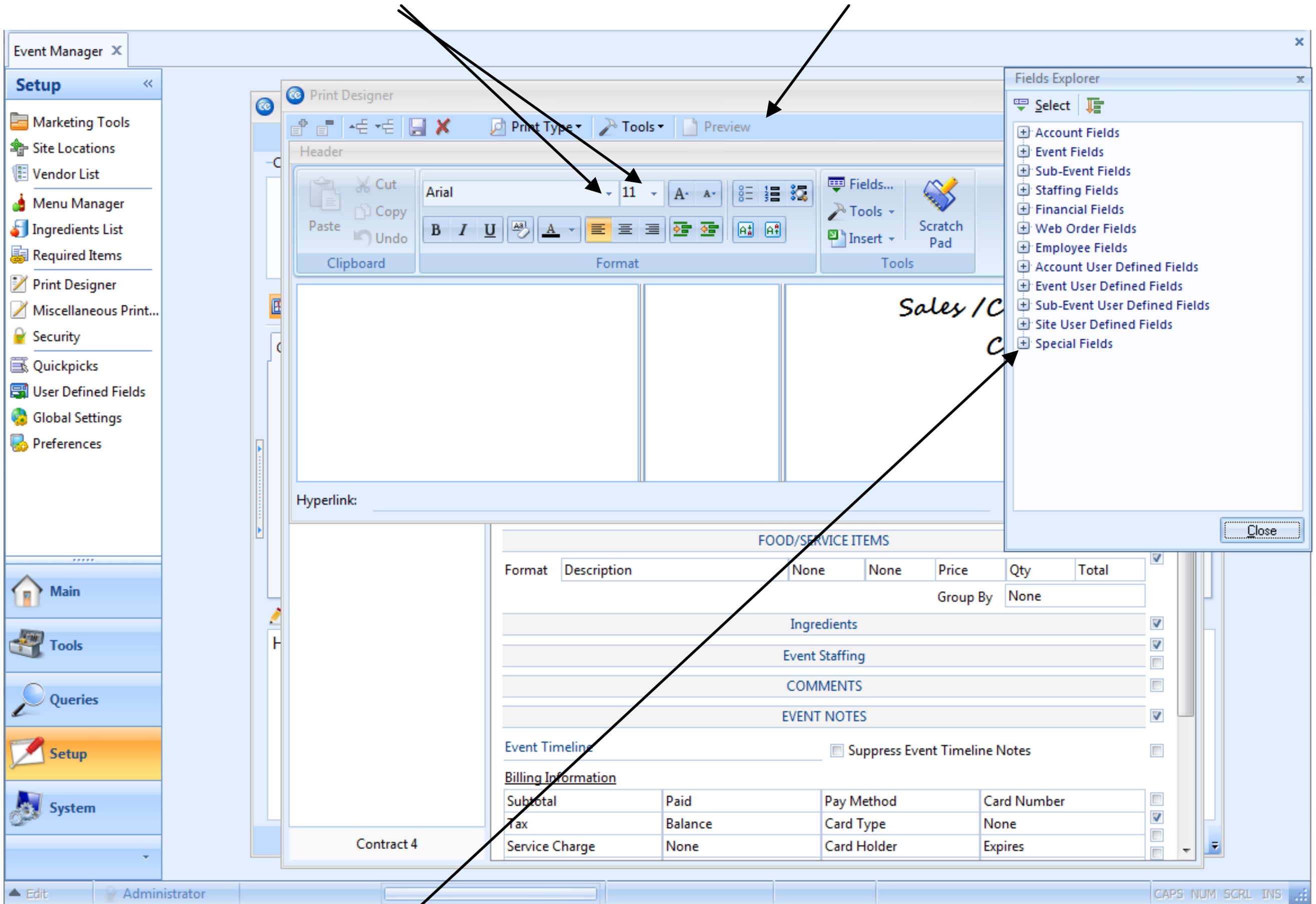
Inserting Merge Fields

1. Type any text you want to act as a label for your merge field.
   Note: *For example, you may want to identify the merge field for the person reading the print; i.e., "Revised Date:," "Party Name:," etc.*
2. Click the **Insert Fields** button , located at the top right of the text window.
   Result: *The Fields Explorer window is displayed.*
3. Click the plus sign to the left of the group of merge fields you want to access.
   Result: *That group expands, showing all related merge fields (e.g.., click the plus sign next to "Event Fields" to see event-specific merge fields).*

__Note:__ As an option, click the __Full Expand__ button  *at the top of the Fields Explorer window to expand all categories of merge fields at once. See Appendix B for a comprehensive list of available merge fields.*

4. Select the field you want to insert, and either double-click it or drag and drop it into the text window.
   __Result:__ Double-clicking a merge field inserts it where the cursor currently resides; dragging and dropping a field allows you to place it anywhere.

Change the font and font size *Print Preview*



Click the plus sign, select a merge field, and insert

Selecting Fields

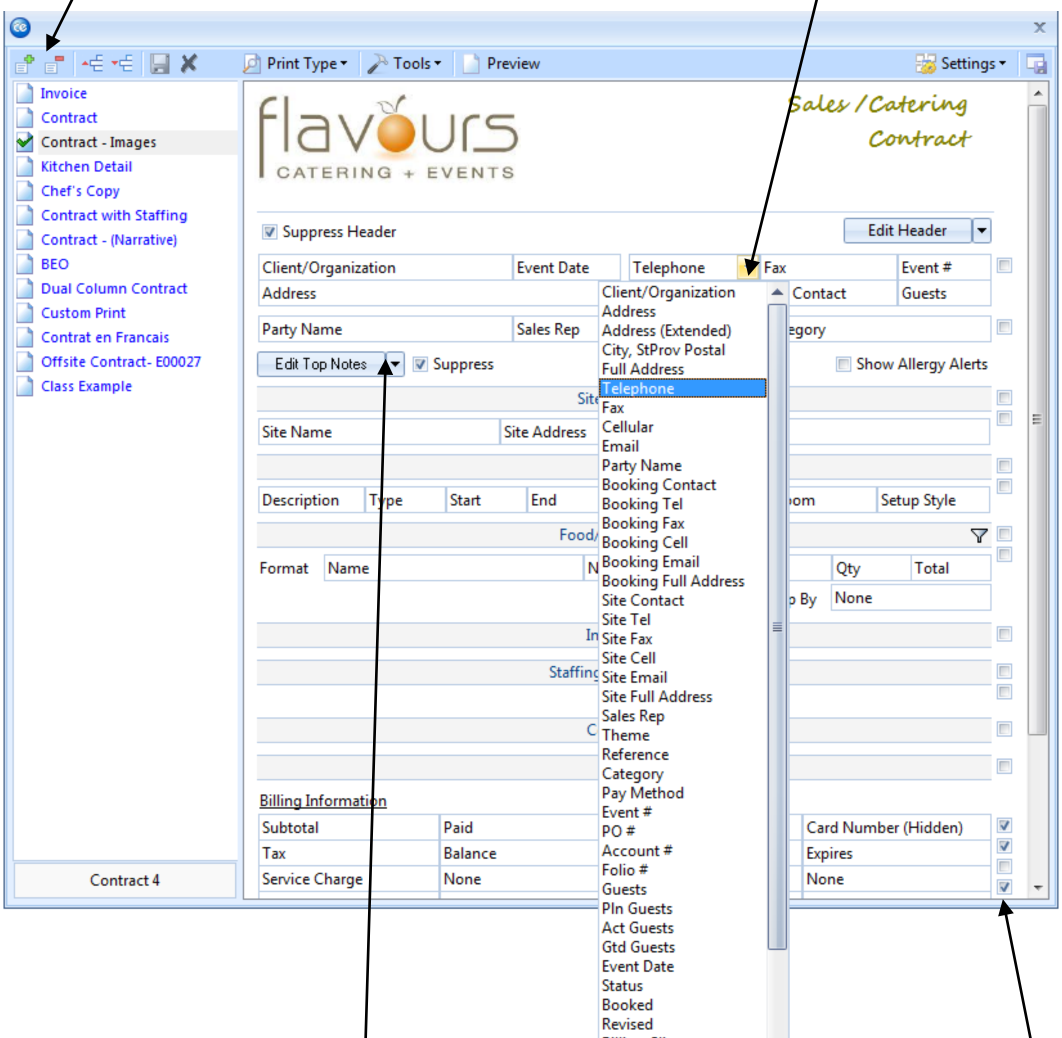
1. Click the down arrow at the right of a particular field (all fields located throughout the print in the Print Designer window).
   Result: *A drop-down list of options appears.*
2. Select a different field from the drop-down list of options.
   Note: *Different sections of the various prints offer different field options. For example, each layout has a specific section where "sub-event" fields — time fields, room or site location information, etc. — are available.*

Suppressing Sections

1. Float your mouse pointer over a checkbox along the right of the Print Designer window.
   Result: *A tooltip appears, identifying which section of the print that box corresponds to.*
2. Enter a check in the box to suppress that section; remove the check to have that section appear.
   Note: *Certain checkboxes work in the reverse; when you click them they SHOW the corresponding details. Be sure to read the speed tip carefully.*

Add, delete or copy a print

Down arrows let you change merge fields



Notes can be modified with rich-text formatting and merge fields

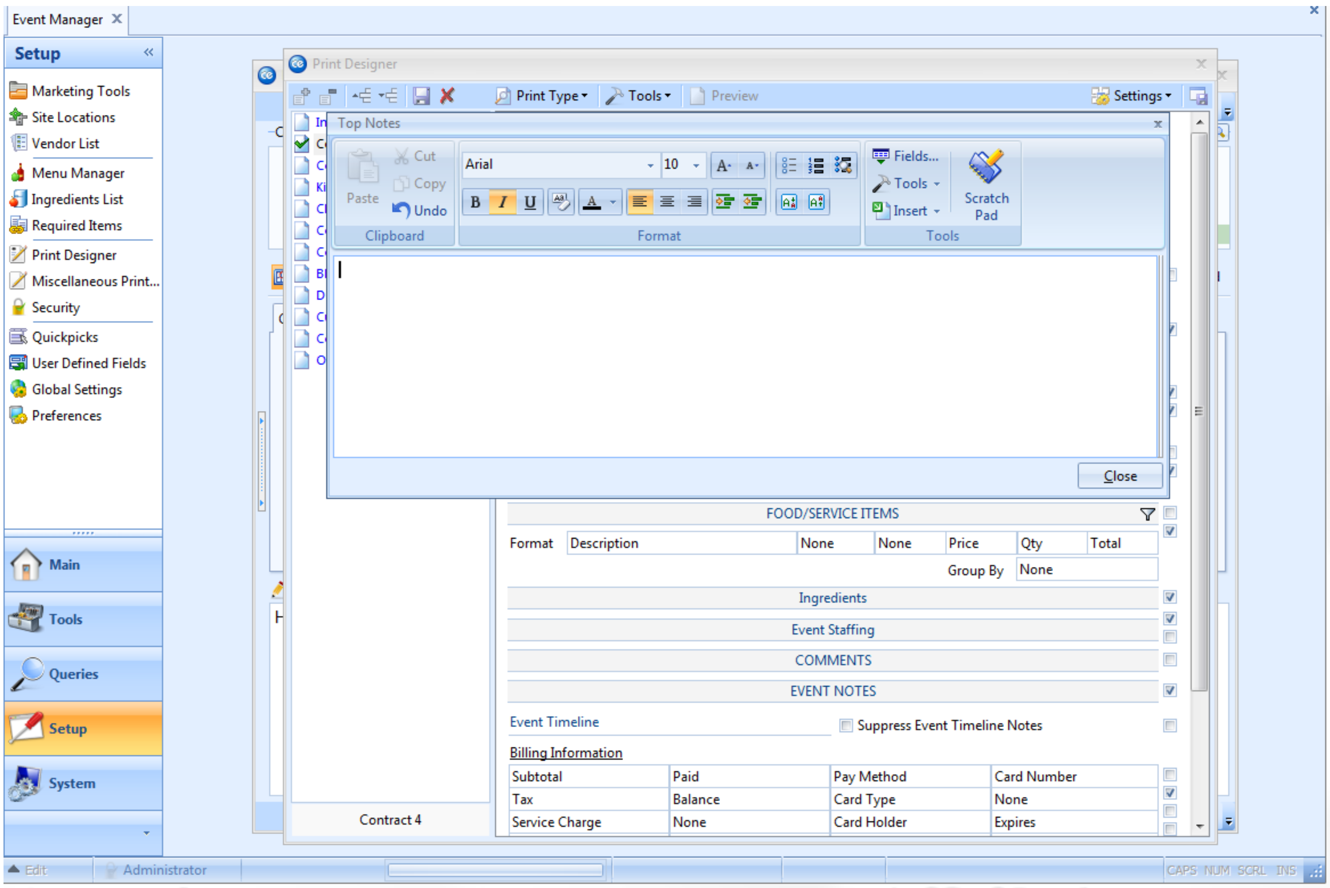
Checkboxes suppress entire sections

Customizing Text Blocks in a Print (See image on next page)

Can I type any text I want into my event prints?
In the Print Designer, there are several areas where you can simply type free-flowing text as desired. You can format this text any way you want, and even pepper it with dynamic merge fields that will automatically pull unique information from each event as you print.

Customizing Text Blocks (Also applies to Bottom Notes and Footer sections.)

1. Click the **Edit Top Notes** button.
   Result: *The Top Notes window opens.*
   Note: *Also optionally click the Bottom Notes or Footer button to edit those sections.*
2. Type into the text box as desired, optionally inserting merge fields and formatting the text as described previously.
3. When finished, click **Close**.



Formatting Food/Service Items in a Print

Can I control how my menu items appear on my prints?
You have a lot of control over the appearance of your items. First and foremost, you determine whether each print will show the detailed "description" of each item – complete with all of your rich-text formatting; or if you want only the name of each item to appear. Then, you can choose which other item details – price, cost, quantity, etc.- appears on the print. Finally, you can make some advanced choices, such as grouping or filtering your items, or hiding certain items on certain prints.

Using the Food/Service Filter

1. Click the **Filter** button , located to the right of the Menu selection, and choose which specific items should appear on this print, using the options outlined below:
   - **Exclude Items Without Quantities**: This checkbox at the top of the window causes this print to ignore any menu items in an event that do not have quantities associated with them.
   - **Type**: Choose (optionally) to only include items with a certain Type or Types (Food, Beverage, Liquor, etc.), or only items that do not have a certain Type or Types (using the Not Equals comparison).
   - **Category**: Choose (optionally) to include items with a certain Category or Categories, or only items that do not have a certain Category or Categories.
     Note: This custom quick-pick list can be used to separate Appetizers from Entrees or Desserts or separate Beer and Wine from Liquor, etc.
   - **Prep Area**: Choose (optionally) to only include items with a certain Prep Area or Prep Areas.
2. When finished, click **OK**.

Choosing a Format for Your Items

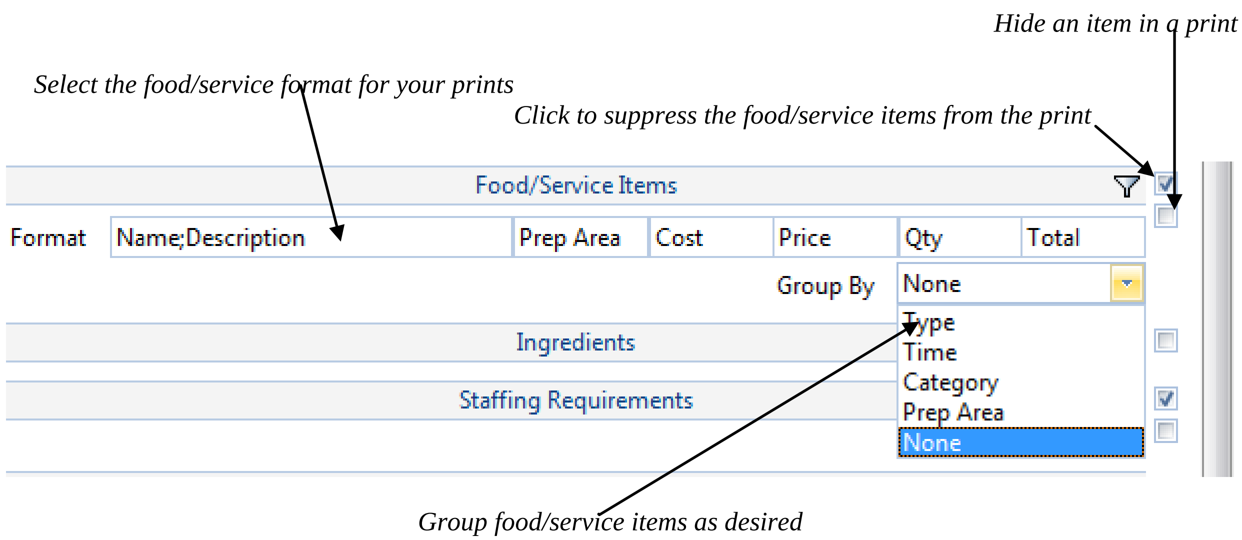
1. Click the down arrow next to **Format** in the Food/Service Items section on the Print Designer screen.
   Result: *A drop-down list of options appears.*
2. Choose to include the name and description of menu items on the print, just the name, or just the description, a picture or the item, any modifications made to the item, a bar code, or notes.
   Click the down arrow to the right of the next field in the Food/Service Items section.
3. Choose to include any of the optional information from the drop-down list, or choose **None** to have nothing appear in this column on the print.
4. Repeat Steps 3 and 4 for the rest of the fields in the Food/Service Items section.

Grouping Menu Items

1. Under the Food/Service Items area of the Print Designer, click the down arrow next to **Group By**.
   Note: *This option is only available on print layouts 1, 2 and 4.*
2. Select how you would like menu items grouped on the print — by "Type," "Category," "Prep Area" or no grouping.
   Note: *Menu item "Type" is a hard-coded list consisting of the options "Food," "Beverage," "Liquor," "Equipment," "Labor," "Room" and "Other." The other two options ("Category" and "Prep Area") are custom quick-pick lists can you create through the **File > Setup** menu in the program.*

Hiding Items on the Print

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


Hide an item in a print
Select the food/service format for your prints
Click to suppress the food/service items from the print
Food/Service Items
Format
Name;Description
Prep Area
Cost
Price
Qty
Total
Group By
None
Type
Time
Category
Prep Area
None
Ingredients
Staffing Requirements
Group food/service items as desired

Advanced Print Settings

What other things can I control on my prints?

You can translate your prints into a number of foreign languages, as well as into your own custom "English" translation – using your specific words and phrases! You can also have Caterease automatically record the date on which you generate each event print. And finally, once you're done designing your perfect custom print, you can simply copy it (*Professional version*) to make minor changes, if you want.

Translating a Print

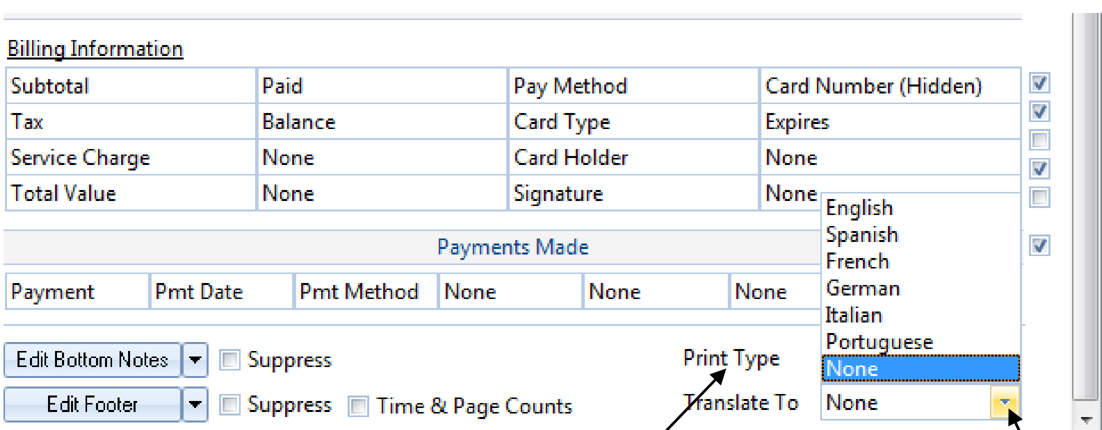
1. Click the down arrow labeled **Translate To** at the bottom right of the Print Designer.
2. Select a foreign language for this print, or choose English to apply alternative terms and labels to the print.

Selecting a Print Type

1. Click the title of the print you want to identify on the left side of the Print Designer screen.
2. Click the down arrow next to **Print Type**, at the bottom right side of your Print Designer.
3. ***Result:*** *A drop-down list of options appears.*
4. Choose the appropriate print type for this print — "Contract," "Invoice," "BEO," or "None," if this print is none of the above.
   Note: *Your program will optionally keep track of the date on which you generate these prints.*

Copying a Print

1. Click your right mouse button over any print title on the left-hand side of your Print Designer screen.
   Result: *A pop-up menu appears.*
2. Choose **Copy Print**.
   Result: *A confirmation message appears.*
3. Click **Yes** to confirm.
   Result: *A new print — an exact duplicate of the original — is added, with your cursor blinking in the title.*
4. Type a title for your new print and press **[Enter]**.
5. Edit the new print as desired.



Click the down arrow next to Print Type and select a print type

Click the down arrow to change language translations

Using the Miscellaneous Prints Designer

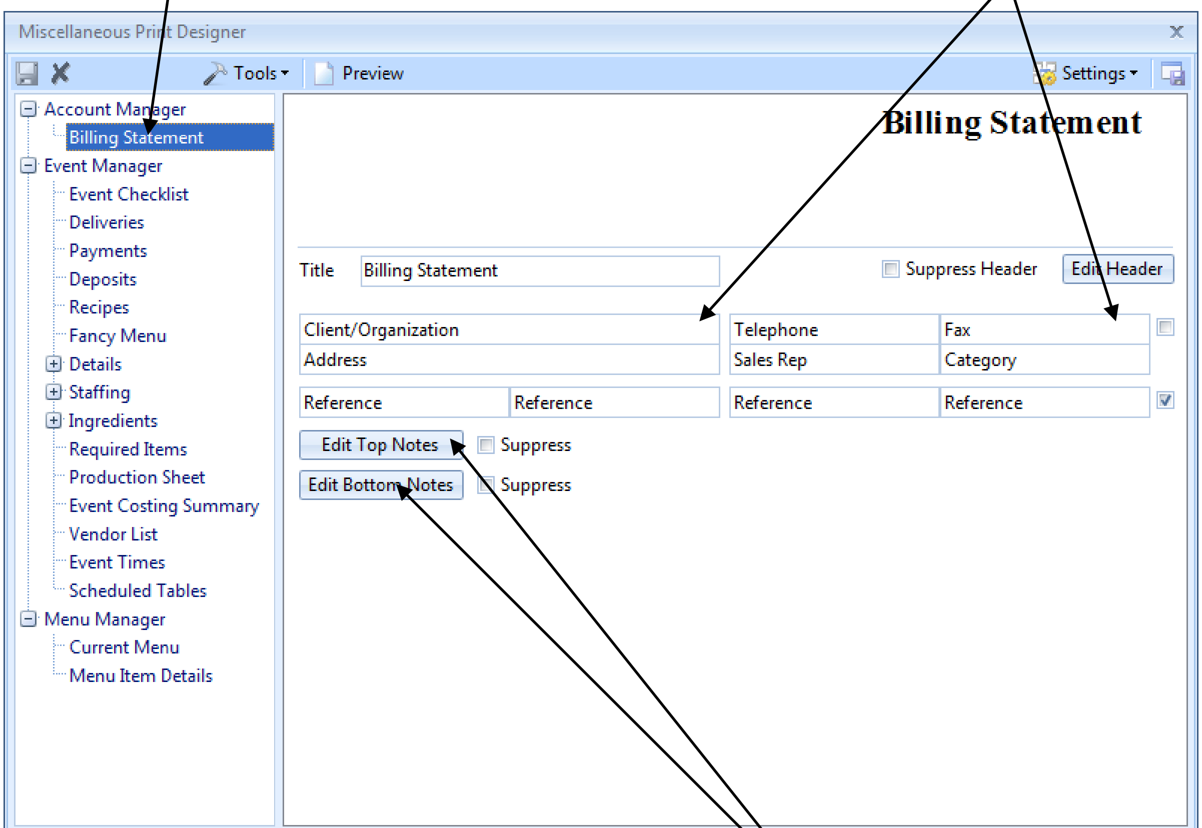
Are there any other prints that I can modify?
The Miscellaneous Prints Designer allows you redesign the tops of various prints, including the Billing Statement in Account Manager and all sub-prints in Event Manager.

Customizing Miscellaneous Prints

1. Click the **Setup** Sidebar.
2. Click **Miscellaneous Print Designer**.
3. Click the down arrow at the top left of the window to choose a print.
4. Click the plus sign before any print category to see the prints in that category.
5. Select a print.
6. Modify using the Miscellaneous Print Designer tools of suppressing sections, rearranging fields, inserting merge fields, formatting text, etc.

Select a print

Click various down arrows to arrange data



Insert merge fields and format fonts in notes sections

Unit 23: Adding Menus and Menu Items

Topics covered in this unit include:

Adding New Menus
Adding Menu Items
Creating Menu Packages

Adding New Menus

What is the Menu Manager?

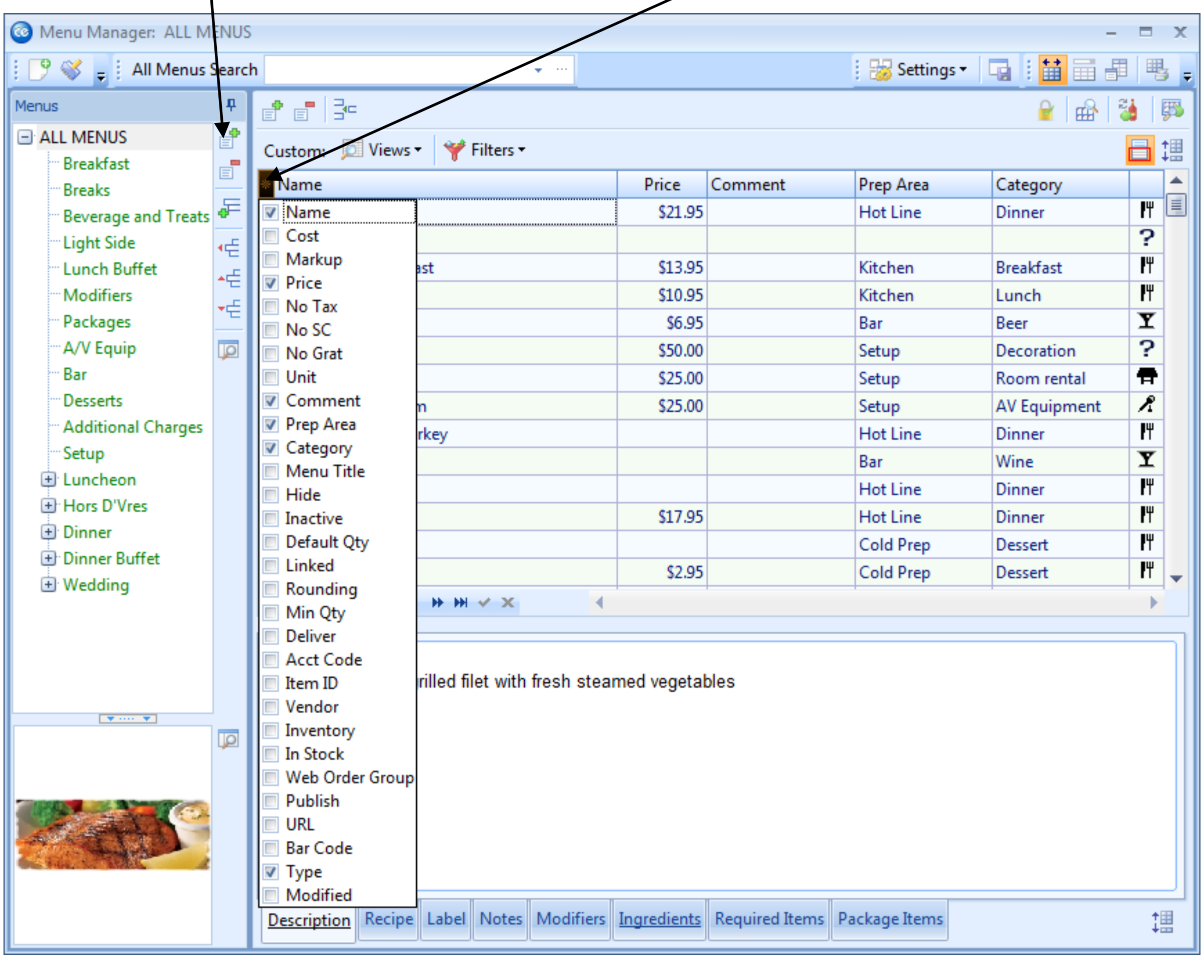
The Caterease Menu Manager allows you to add a limitless number of menus and submenus to your program. You can name these anything you want, and rearrange them at any time into whatever order works best for you. Remember, these are food ***and*** service menus - meaning you should include any items you might be charging the customer for, including possibly *Equipment* items or *Room Fee*s.

Adding a Menu

1. Access the Menu Manager by clicking the **Menu Manager** button on the **Setup** sidebar on the left-hand side of your screen.
2. To the right of the Menu Titles panel (along the left side of the Menu Manager), click the **Add A New Menu** button. A new menu will be added to the bottom of your list.
3. Type a name for your new menu and press your **[Enter]** key.
4. Drag your new menu to any position on the list by clicking and holding your left mouse button on your new menu title and then dragging and dropping it (drop by letting go of your left mouse button). You can make the menu a submenu of another menu if you hold your **[Shift]** key down as you drag it.
5. As an option, you can click the **Display Details** button and type a long title, add a digital picture, and enter a description for the menu.

*Click the green plus sign to **Add New Menu***

Click to move, add or remove menu item columns to display



Adding Menu Items

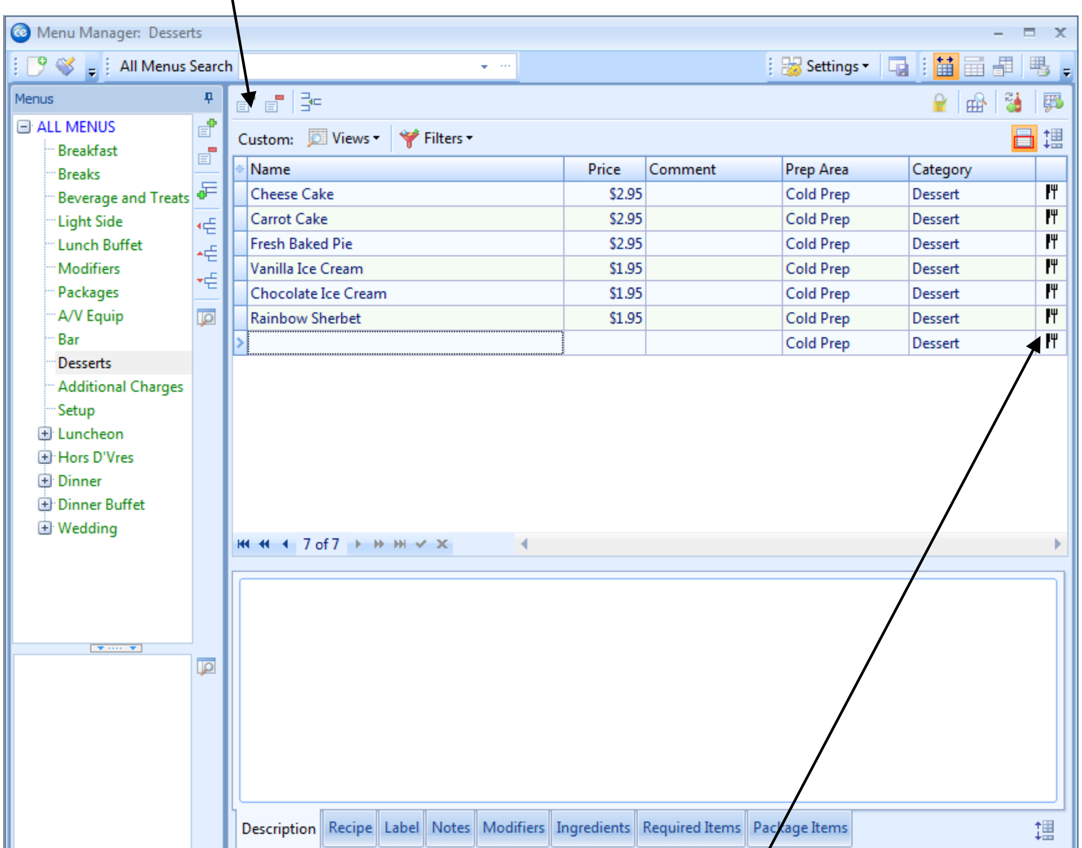
Where do I click to add a new menu item?

The Menu Manager makes use of the main toolbars located at the top of your screen. As with adding anything in Caterease, you add menu items by clicking the green "plus sign" – located in this main toolbar.

Adding Items

1. Access the Menu Manager by clicking the **Menu Manager** button on the **Setup** sidebar on the left-hand side of your screen.
2. In the left panel of the Menu Manager, click the title of the menu you want to add an item to. If accessing a sub-menu, click the plus sign to the left of the menu title.
3. Click the **Add Record** button, located in the main toolbar at the top of the screen, to add a blank line to the bottom of this menu. This button is identical to the **Add New Menu** button near the left panel of your form. Do not confuse them.
4. Type a Name for the new menu item. For more information on creating long descriptions of menu items, see *Menu Item Description*.
5. Press [**Enter**].
6. Type a Price for the new menu item, or click the down arrow to the right of this field to get assistance from the calculator.
7. Press your [**Enter**] key twice, until you get to the Type column.
8. Click the down arrow and choose a Type for the menu item. Your options include Food, Beverage, Liquor, Equipment, Labor, Room, or Other.
9. Hold your left mouse button down over the name of your new menu item.
10. Drag to any new position on the menu and let go of the mouse button.

Click the green plus sign to ***Add New Item***



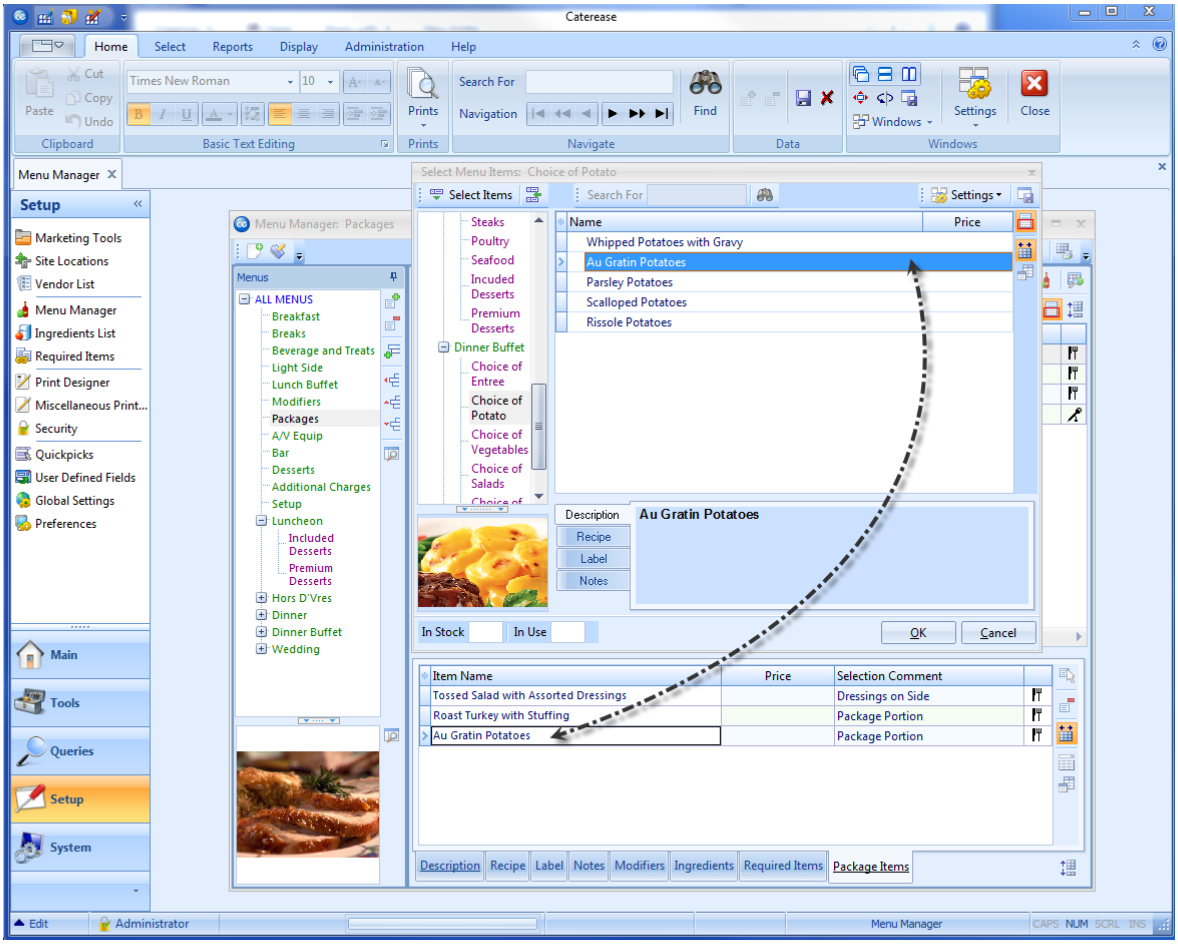
Be careful that each item has the appropriate "Type."

Creating Menu Packages (See image on following page)

1. Access the Menu Manager by clicking the **Menu Manager** button on the **Setup** sidebar on the left-hand side of your screen.
2. In your Menu Manager, click the **Package Items** tab, located at the bottom right-hand side of the screen.
3. Click the **Packages** tab on the left-hand side of your screen.
4. To add a new package, click the **Add New Item** button from the top of the screen.
5. Type the name of the new package into the <u>Name</u> field and press [**Tab**] or [**Enter**].
6. Type a Price into the <u>Price</u> field and press [**Tab**] or [**Enter**].
7. Click the **Select Items** button , located on the lower right-hand side of the screen.
   Result: *The Select Menu Items window displays.*
8. Select a menu title.
9. From the available menus, select a single menu item or multiple items by following the guidelines below:
   - Click an item to select it.
   - Hold your left mouse button down and drag your cursor over multiple items.
   - Click one item, hold the [**Ctrl**] key down on your keyboard, and drag your cursor over multiple items.
   - Click one item, hold the [**Ctrl**] key down on your keyboard, and click other items.

10. Drop items from the selection screen into your menu package, using the following guidelines
    - Double-click a single item in the Select Menu Items window.
    - Hold your mouse button down on one individual item (without moving) for a half second and drag that item from the Select Menu Items window into your Menu Manager screen, dropping it on top of your "menu package" item.
    - Hold your left mouse button down on a group of selected items and drag and drop them into the Menu Manager screen.
    - Click the **Select Items** button or the **OK** button to select all highlighted items into the menu package.

11. Remove the price from each of the individual items in your package.



*Retrieve items by dragging and dropping, or clicking **OK** or **Select Items***

Unit 24: Establishing System Security

Topics covered in this unit include:

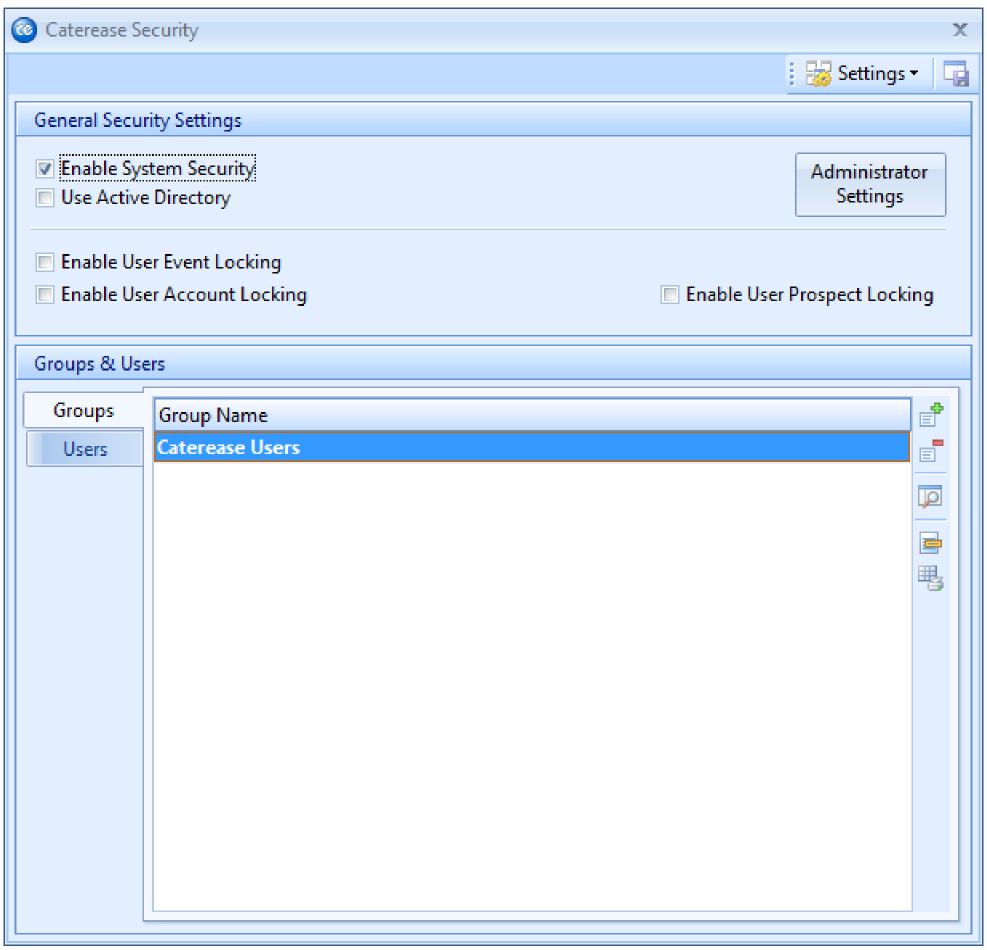
Accessing System Security
Creating an Administrative Password
Adding Users & Passwords
Establishing Individual Access Rights
Creating User Groups

Setting up Security

What exactly does "enabling security" mean?
Before you add users and passwords, you must first enable your overall system security. First, a single mouse click will enable password protection in your program. Without protection enabled, you could add all the users and security levels your little heart desired but they would be ignored by the program. Next you should assign a main system (or administrative) password. You can then prevent users from accessing certain information or performing certain tasks unless they are privy to this main password.

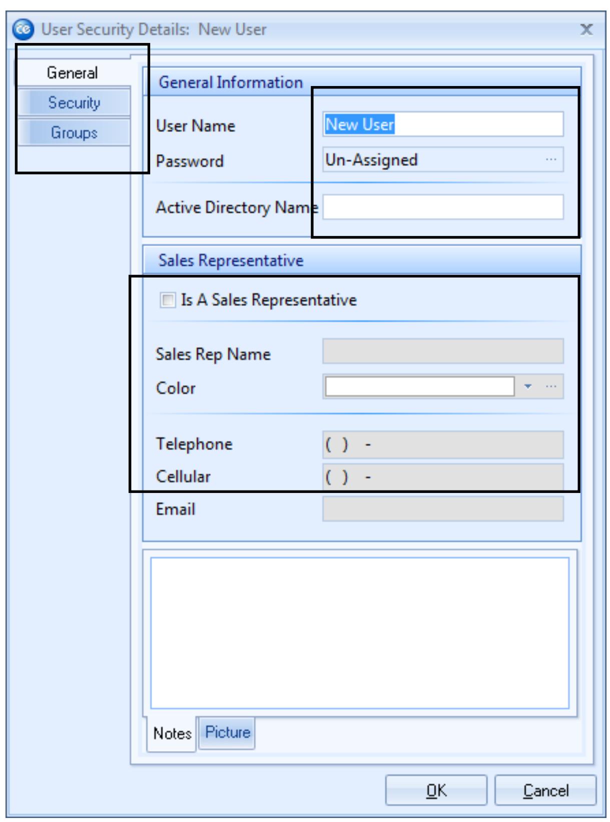
Enabling Security

1. Click the **Security** button from the **Administration** ribbon tab at the top of the screen.
2. From the Administrator Settings screen, click the **Enable System Security** checkbox.
3. Click the **Administrator Settings** button.
4. From the Administrator Settings screen, click the ellipse button to set up an administrative password.
5. Click **Yes** at the **Enter new Main Caterease Password**? prompt.
6. Carefully type a password to serve as your main system (administrative) password (minimum of four characters).
7. Press your **[Tab]** key and retype the password into the Again field to verify.
8. [**Optional**] Add a picture to the Picture block by clicking your right mouse button into the field and then selecting **Load From File**. Browse to the desired image and double-click to select it.
9. When finished, click **OK**.



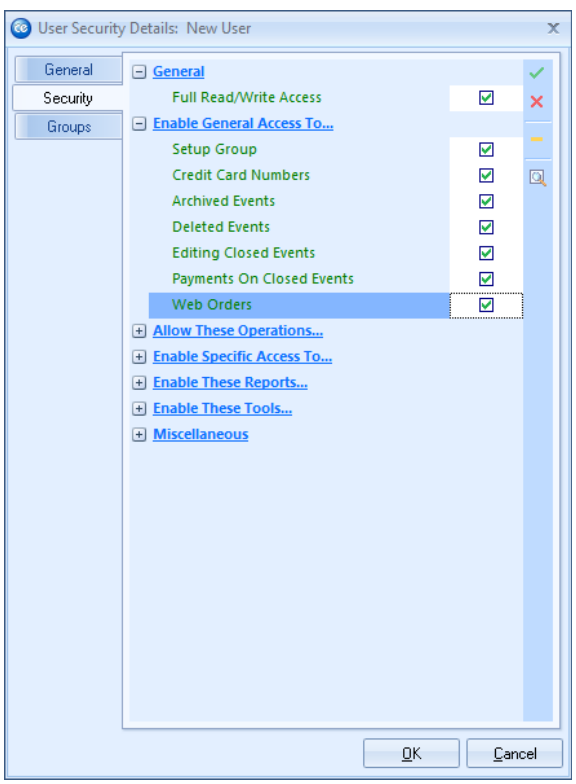
Adding Users and Passwords

1. Click the **Add User** button (green plus sign), located at the top right of the Caterease Security screen.
2. Enter a User Name for the new user.
3. [**Tab**] or press [**Enter**] to move to the next field.
4. Enter and confirm a password as described above.
   Note: *Passwords must have a minimum of four characters (numbers and/or letters), and are not case-sensitive.*
5. [**Optional**] Enter the name of this user as it exists in your Windows Active Directory into the Active Directory Name field.
   Note: *Users with Active Directory Names will not need to log into Caterease separately; after they log into Windows, they will automatically be recognized when loading Caterease, and their specific program permissions will be established.*
6. [**Optional**] Click the box labeled Is a Sales Representative, and enter a Sales Rep name if you would like this user's name to be included on your list of Sales Representatives. In addition, you can choose a color to be associated with this sales rep when color-coding options are used within the program.
7. [**Optional**] Enter the telephone, cellular number, and e-mail address of the sales rep into the fields provided.
8. [**Optional**] Click the Notes text block and enter any relevant notes associated with this user or his/her program access level.
9. [**Optional**] Add a picture to the Picture block by clicking your right mouse button into the field and then selecting **Load From File**. Browse to the desired image and double-click to select it.
10. Click the **Security** tab on the left side of New User window and establish security settings for this new user.
11. **[Optional]** Click the **Group**s tab and select the security groups to which this user belongs.
    Note: *You can also select users into groups, as opposed to selecting groups for users. A user's security settings take priority over the group's; if a user is specifically allowed to or prohibited from doing something, that will determine access.*
12. When finished, click **OK**.



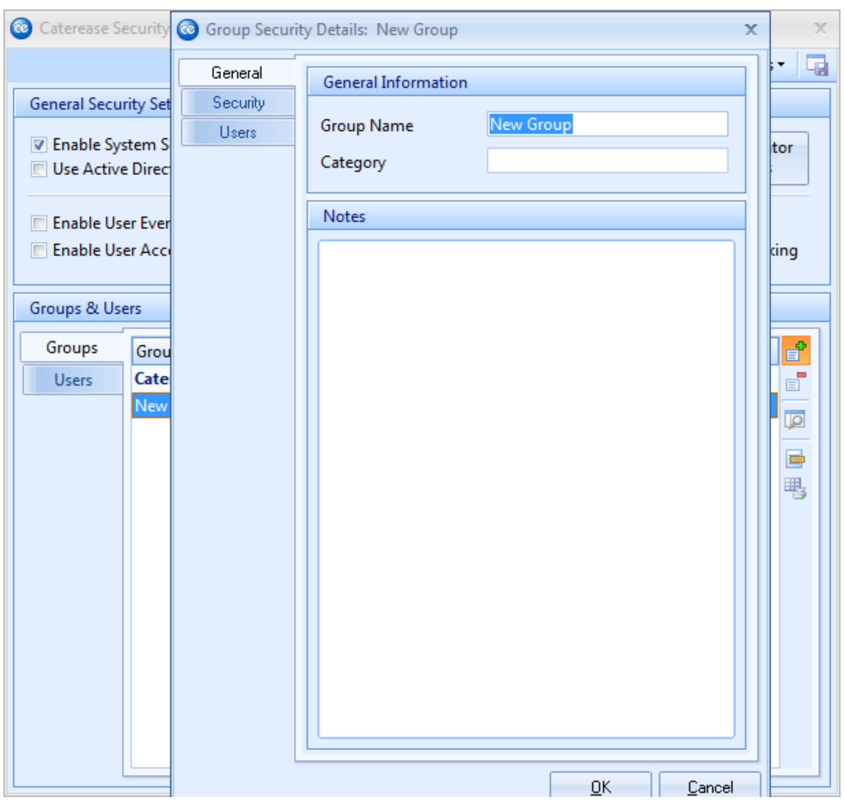
Establishing Individual Access Rights

1. Access the Caterease Security window.
2. Click the **Users** tab on the left side of the window.
   Result: *A list of currently established users is displayed.*
3. Verify that Enable System Security (top left of the window) is selected.
   Note: *Users will not be required to log into Caterease, and security settings will not take effect if the Enable System Security checkbox is not checked.*
4. In the list of users, click the name of the one you wish to edit to select it.
5. Click the **User Details** button **,** located on the right-hand side of the User Security Details window**.**
   Result: *The User Security Details window for the currently select user appears.*
6. Click the **Security** tab on the left side of the User Security Details window.
   Result: *A list of all possible security settings, separated into categories, is displayed.*
   Note: *By default, every new user you add is a member of the user group "Caterease Users," and therefore automatically inherits the permissions established in that group. Any setting listed with a red font indicates a setting that is disabled for this user because of a group (such as "Caterease Users) he belongs to. (These settings can be superseded by allowing/disallowing features here for the individual user.)*
7. Click the small plus sign to the left of any category heading to expand that category of settings, or click the small minus sign button to collapse a category.
   Note: *As an option you can right-click anywhere in the* **Security** *tab and choose* ***Expand All*** *to expand all categories of settings.*
8. Click any checkbox consecutively to insert a green check mark, a red X, or a yellow dash - to respectively allow the user permission to perform that option, or deny permission, or defer to the permissions of the group that user is in (see #10, below).
9. **[Optional]** Click the **Check All Security Settings** button , **Uncheck All Security Settings** button or **Clear All Security Settings** button to edit all user security settings simultaneously.
10. **[Optional]** Click the **Show Security Details** button to view a window as you scroll through the settings, to help you identify which group or user's settings apply.



Creating User Groups

1. Access the Caterease Security window.
2. Click the **Groups** tab on the left-hand side of the window.
   Result: *A list of currently established security groups is displayed.*
   Note: *All users in the program will belong to the default group of "Caterease Users." While you can edit permissions in this group and affect all users, you cannot delete the group entirely.*
3. Click the **Add Group** button on the right-hand side of the window.
   Result: *A New Group window appears.*
4. Enter a Group Name for the new group.
5. Enter a descriptive Category.
6. **[Optional]** Enter detailed Notes pertaining to the group or its specific security settings.
7. Click the **Security** tab on the left-hand side of the New Group window.
   Result: *A list of all possible security settings, separated into categories, is displayed.*
8. Click the small plus sign to the left of any category heading to expand that category of settings, or click a small minus sign button to collapse a category.
   Note: *As an option you can right-click anywhere in the* **Security** *tab and choose **Expand All** to expand all categories of settings.*
9. Click any checkbox consecutively to insert a green check mark, a red X, or a yellow dash - to respectively allow the user permission to perform that option, or deny permission, or defer to the permissions of other security groups that user is in.
   Note: *As a default all settings are neutral, meaning access to a feature.*
10. **[Optional]** Click the **Check All Security Settings** button , **Uncheck All Security Settings** button or **Clear All Security Settings** button to edit all user security settings simultaneously.
11. **[Optional]** Click the **Users** tab on the left side of the window and click the **Select Users** button to select users for this group.
    Note: *You can also select groups for a user, as opposed to selecting users for a group.*
12. When finished, click **OK** to close the New Group window.



Unit 25: General Program Setup

Topics covered in this unit include:

Customizing Quickpick Lists
Customizing Name Fields
Establishing Required Fields
Creating User Defined Fields
Setting New Booking Defaults
Establishing Default Tax Rates
Using a Default Deposit Schedule
Configuring Global Settings
Customizing the Scratch Pad
Adding to the Site Locations Database
Creating Banquet Rooms/Setup Styles
Assigning Setup Styles/Capacities/Breakout Rooms
Blocking Banquet Rooms

Adding Items to the Quickpick Lists

What is a Quickpick list?

Throughout your Caterease program there are several drop-down or “quickpick” lists to assist you in data entry. These lists exist to save you the tedium of double entry and to keep your data consistent. For example, rather than having to type the event theme “Wedding Reception” multiple times (and risk accidental misspellings), you can simply pick it from your event theme quick-pick list. These lists are completely under your control, and can be edited by you at any time.

Selecting a Quickpick List

1. Access the Setup Quickpick Lists form by clicking the **Quickpicks** button on the **Setup** sidebar on the left-hand side of your screen.
2. Click the sideways triangle to the left of any quick-pick category (left-hand side of screen) to see the corresponding lists.
3. Click the desired quick-pick list to select it.

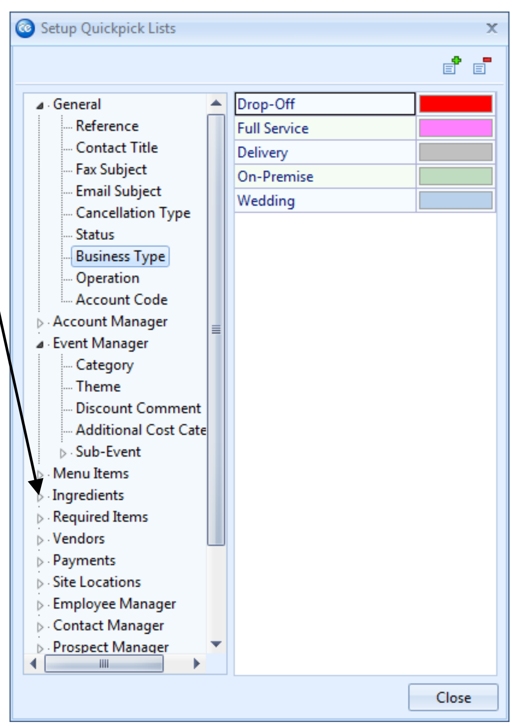
Adding a Quickpick Item

1. Click the **Add New Item** button, located at the top right of the Setup Quick-Pick Lists form.
2. Type a name for your new quick-pick item.
   Note: *Some lists allow you to choose a default color for items. Grids in the program (and the Event Scheduler display) can be color-coded based on these lists.*
3. When finished, click **Close**.

Editing Existing Quickpick Items

1. Click any quick-pick item to select it.
2. Type as desired.
   Note: *See above note regarding color*.
3. When finished, click **Close**.

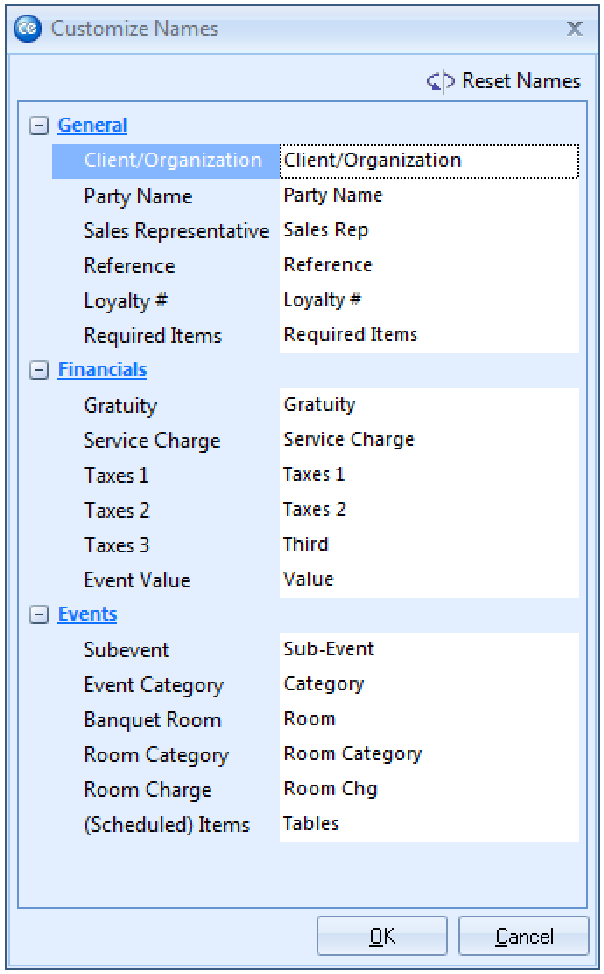
Click the expand button to display the options.



Customizing Name Fields

Can I change the names of the various fields?
If you do not like the term “Sub-Event,” or if you’d rather use the field “Category” to track some specific piece of event information, either of these can be renamed through your program’s Global Settings.

1. Click **Administration** > **General** at the top left of your Caterease screen.
2. Choose **Customize Names**.
3. Click in the General, Financials, or Events category fields and type a new name as desired.
4. When finished, click **OK**.



Creating Required Fields

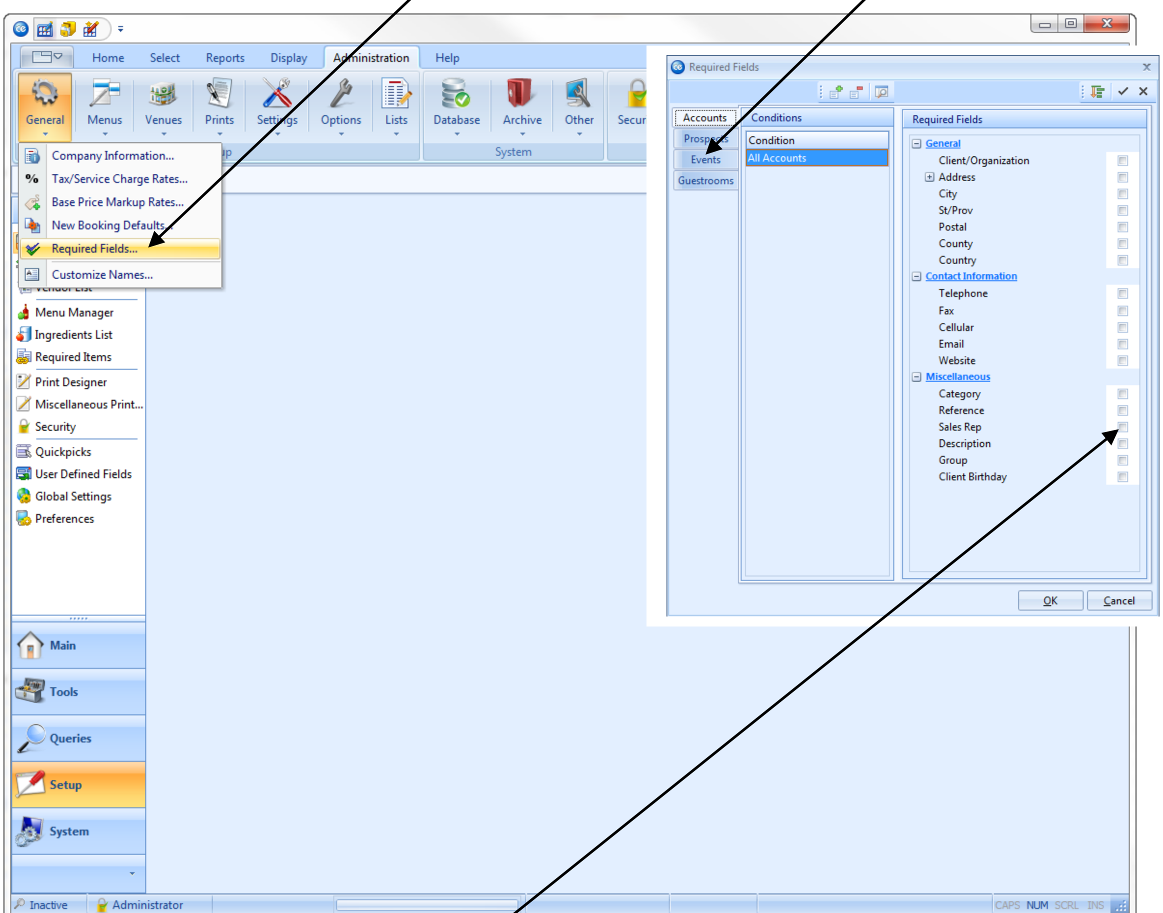
How do I make sure my sales people enter the information I need?
A perfect way to add structure to your sales people's data-entry process is by using the Required Fields feature. This tool allows you to designate certain fields in Event Manager as required, meaning an event cannot be saved unless this information is entered. Optional required fields include general event fields such as Event Theme, Event Date, guest counts, etc., as well as sub-event fields such as times, room information, or off-site location information.

Designating Fields as Required

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **General** button and choose **Required Fields**.
   Result: *The Required Fields window displays.*
3. Click any checkbox on the *Events* or *Sub-Event* tab to designate the corresponding field as required.
   Note: *As an option, you can click your right mouse button anywhere on either tab to choose* ***Check All Fields*** *(or even* ***Clear All Fields****).*
4. Click **OK**.
   Result: *The window will close, saving your changes.*
   Note: *The next time you open Event Manager, any fields you designated as required will be highlighted in red on your screen. If your Event Manager was open when you established your required fields, you will need to close it and reopen it for the changes to take effect.*

Click ***Administration*** *>* ***General*** *and choose* ***Required Fields***

Choose the Manager needed (Accounts, Prospects, Events, Guestrooms)



Click any field to make it required, or right click and choose ***Check All Fields***

Creating User-Defined Fields

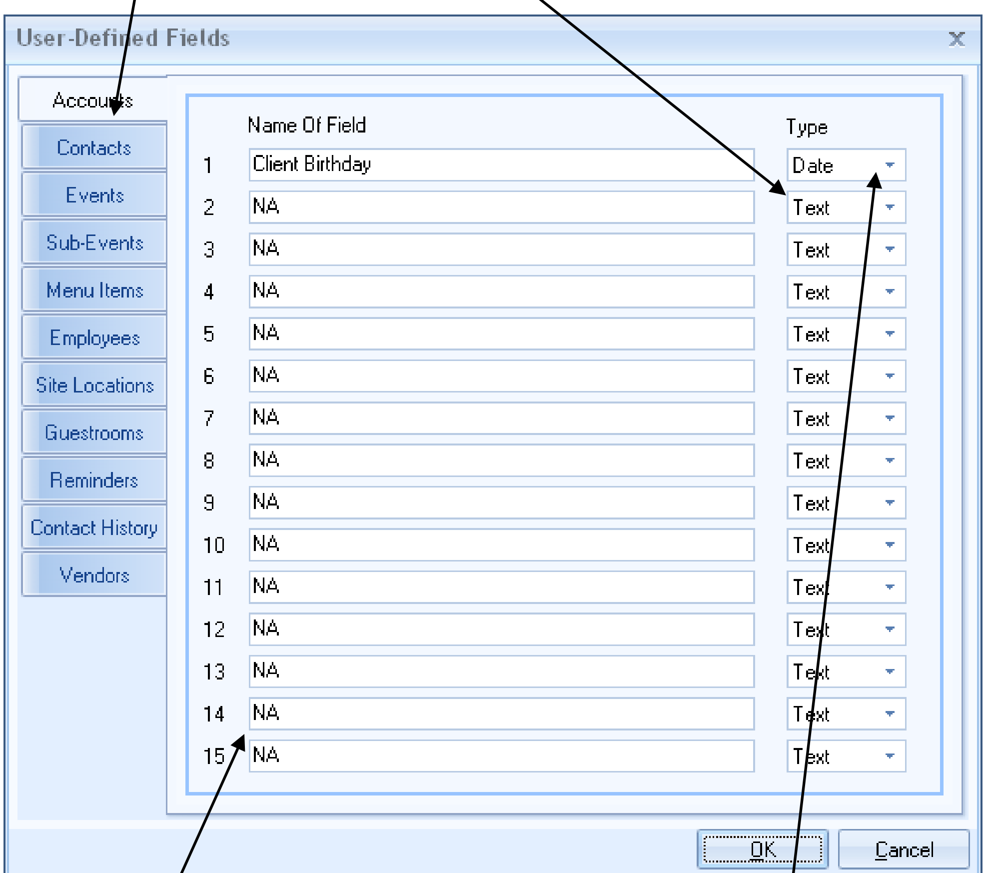
What is a Use- Defined Field and what is its purpose?
A User-Defined Field is one that is created by the user of the software. If there is a need for a new information field that does not exist in the Caterease database, the user may create the field. These fields are trackable and can be utilized in various reports, contracts, and letters. The user may create up to 15 fields in the Account Manager, 15 fields in the Event Manager, 10 in the Sub-Events, and 10 in the Guestrooms Manager.

How to Create User-Defined Fields

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Lists** button and choose **User Defined Fields**.
3. Click on the tab reflecting which area of the program you want to create fields for: *Accounts* for your Account Manager, *Events* for your Event Manager, *Sub-Events* for the Sub-Event display or *Guestrooms* if you own the Guestrooms Manager.
4. Click on the first available field and type in your description of that field
5. Click the arrow under Type to format the new field using the following guidelines:
   - *Text* – alpha-numeric format
   - *Phone* – formatted for phone number entry
   - *Number* – formatted for numbers only
   - *Currency*—formatted for currency
   - *Date* – formatted for date entry
   - *Time*-formatted for time entry
6. When finished, click **OK**.

Choose the Manager desired

Any field formatted as a text field can have a corresponding quick-pick list.



Unassigned fields have "NA"

Date fields will have corresponding drop-down calendars.

Inputting User-Defined Fields

Where can I use these new fields I've created?
User-defined fields can be added to your program in a variety of places – your Event Manager, your Sub-Event form, your Account Manager or your Guest Rooms Manager (for hotels, motels, inns, etc.) You can even insert user-defined fields in your various prints, from contracts and invoices to merge letters and other prints.

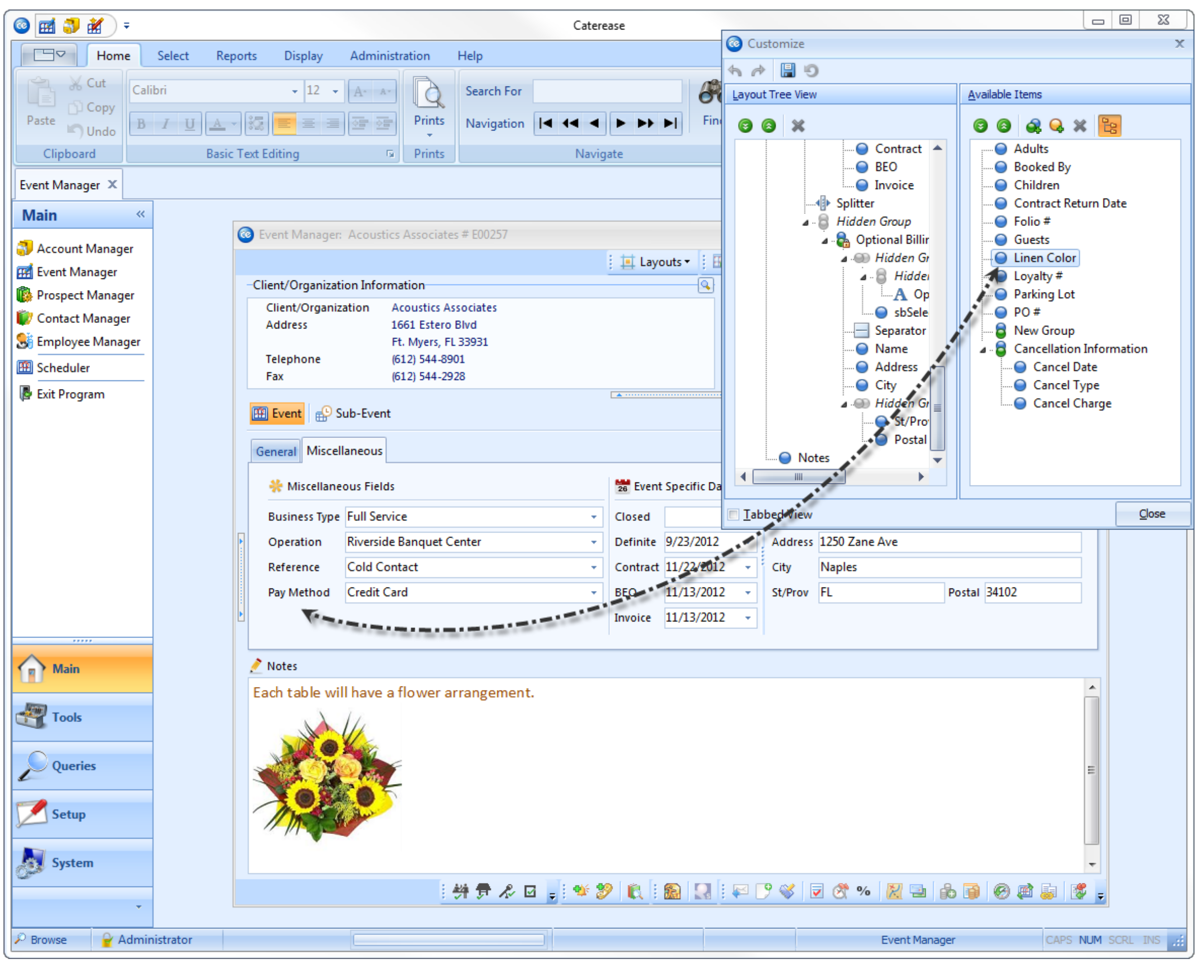
Adding User-Defined Fields to your Screen

1. Click your right mouse button on the user-defined fields area of the screen.
2. Select **Customize**. A small window pops up with available user defined fields.
3. Hold your left mouse button down on one of the available fields.
4. Drag it and drop it onto your screen.

Other areas where user defined fields can be utilized

You can display user-defined fields anywhere on your various event prints, including inserting them as merge fields in the following places: top notes and bottom notes sections in all contracts and invoices, top notes in all sub-prints, and anywhere in the body of your merge letters. See documentation on your Print Designer for more details.

User-Defined Fields can have corresponding drop-down calendars, calculators or quick-pick lists.



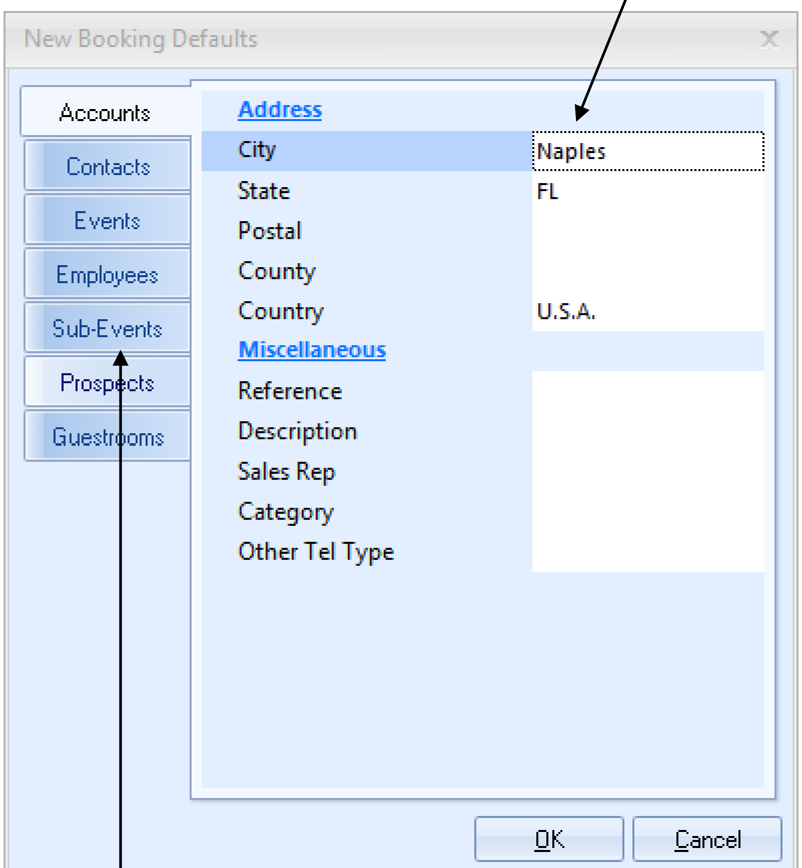
Creating New Booking Defaults

What are new booking defaults?
New Booking Defaults are all about preventing you from typing the same thing more than once. For example, if most of your accounts are within your city limits, you can make that city the default for every new client you book. That way, most of the time you will not have to type a city when you add a new account to your program. New Booking Defaults exist for several areas of your program - accounts, events, employees, or guest rooms.

Entering Default Information

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **General** button and choose **New Booking Defaults**.
3. At the top of the New Booking Defaults form, select the tab that has the information you want to enter or change.
4. Click in a field and type as desired or click in a quick-pick field, click the down arrow at the right of a field and select a default from the list.
5. Press your **[Enter]** key to move to the next field.
6. When finished, click **OK** to close the form and save your changes.

Select your most commonly used event information from the quick-pick lists



Select the desired tab to change related default settings

Setting Tax/Service Charge Defaults

What are default tax/service charge rates?

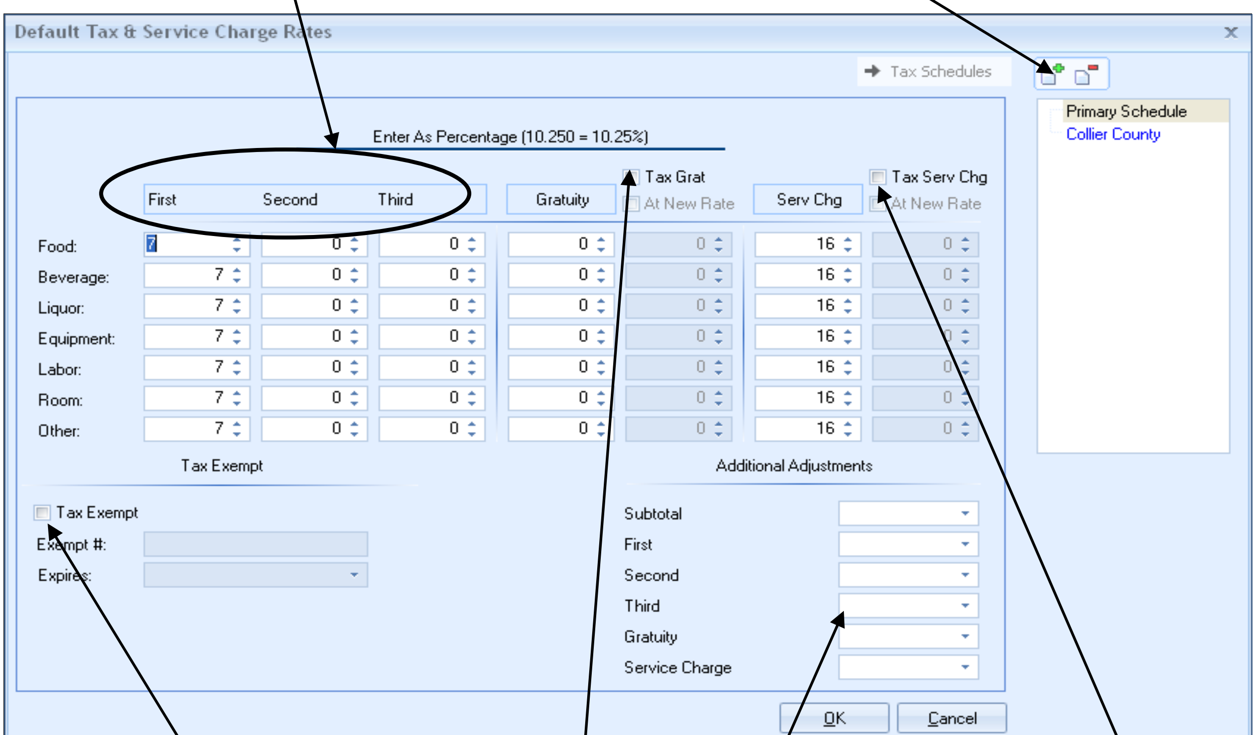
Your default tax and service charge rates are the rates that will automatically apply to each new order you book in Caterease. While you can certainly change tax and service charge rates at any time within a particular order, you obviously don't want to be doing that every single time you book a new event. So it's important to make sure your default tax and service charge rates are set correctly.

Establishing Tax & Service Charge Rates

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **General** button and choose **Tax & Service Charge Rates**.
3. Enter a new tax rate for your <u>Food</u> items by typing numbers as desired, or by clicking the up or down arrows next to the tax rate to increase or decrease the rate one percentage point, respectively.
4. Press your **[Enter]** or **[Tab]** key to move to the next field.
5. Repeat as desired for all three optional tax rates and your service charge rates.
6. If you wish to apply a tax to your service charge and/or gratuity rates, click the checkbox beside the words Tax Grat or Tax Serv Chg.
7. [**Optional**] Click the checkbox labeled <u>At New Rate for Tax Grat</u> or <u>Tax Serv Chg</u>. ***Note:*** *Use this feature only if you wish to tax your gratuity or service charge rate at a rate that is different from your current tax rate(s).*
8. To make all new orders in your program default to tax exempt, click the checkbox next to the words Tax Exempt at the bottom left of the form.
9. When finished, click the **OK** button at the bottom right of the form to close the form and save your changes.

Change names of tax columns with "Customize Names"

Make a new tax schedule



Set Tax Exempt status as a default setting

Add misc. numbers

Check to tax service charge

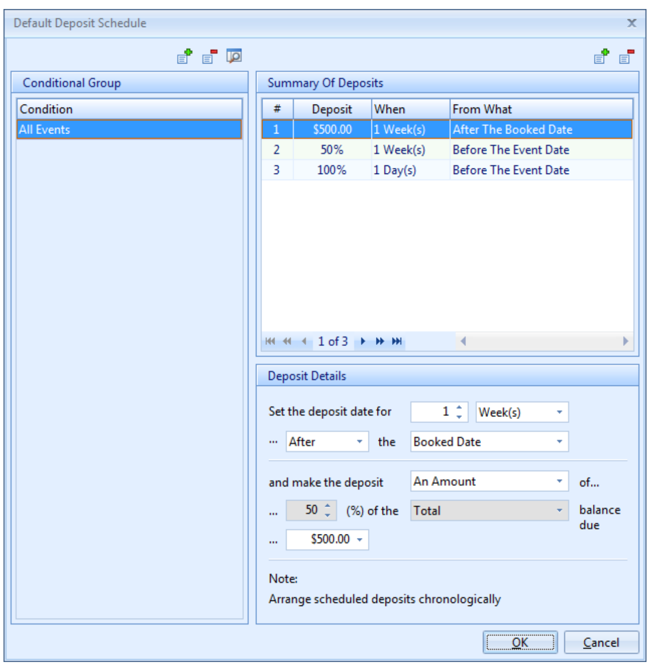
Check to tax gratuity

Using a Default Deposit Schedule

What if I have a deposit schedule I use for all of my events?
You have the option in Caterease of creating a unique default deposit schedule to be used for any event. Then you simply open the Deposits window in any event and click one button, and the program automatically creates a deposit schedule based on the rules you've established.

Creating a Default Deposit Schedule

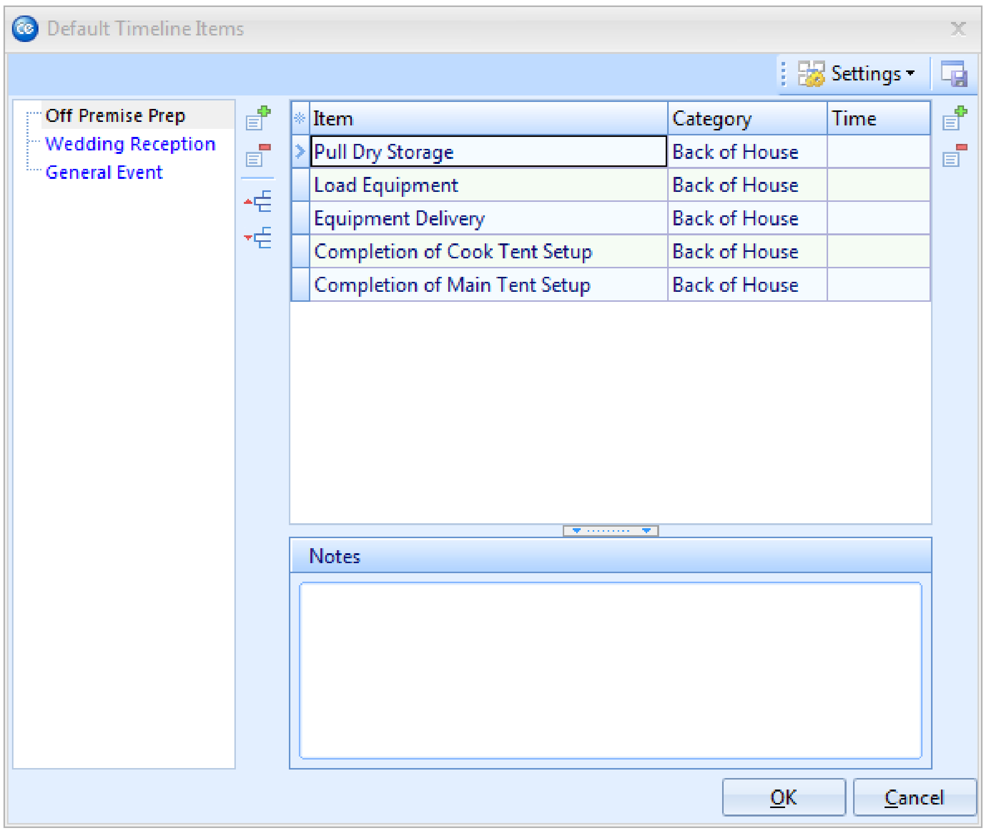
1. Click the **Options** button on the **Administration** ribbon tab at the top of the screen.
2. Select **Deposit Schedule**.
   Result: *The Default Deposit Schedule window displays.*
3. Click the **Add Record** button  at the top of the window.
   Result: *A new record is added to the deposit schedule.*
   Note: *This new record will have certain default values that you can change using the steps below.*
4. Set the number of days, weeks, or months out you want this deposit to be due using the first two fields on the right-hand side of this window (the Details section on the right-hand side of the window).
   Note: *Achieve this by typing a number or using the up and down arrows in the first field and clicking the down arrow next to the second field and selecting Days, Weeks, or Months.*
5. In the second row of fields, choose whether this deposit will be due before or after the event date or the date on which the event is booked.
6. In the third row, determine whether the amount of the deposit should be calculated as a percentage of the event totals or as a whole dollar amount, as follows:
   - If setting a percentage of the event totals, use the fields in the fourth row to set the percentage amount (first field) and the total to use as the basis.
     Note: *You would probably use the "Remaining balance due" option for all subsequent deposits after the first one. For example, a possible first deposit might be "50% of the Total balance due," but subsequent deposits might be based on the balance that remains. In other words, "Total balance due" represents the total amount of sales for that event, regardless of whether any deposits have been received.*
   - If setting a whole dollar amount, use the field in the fifth row to set that dollar amount — either by typing into the field or clicking the down arrow to access the drop-down calculator.
7. Repeat to create additional deposits.
8. Click **Close** to close the window and save your changes.



Creating a Default Event Timeline

How can I create a default timeline to keep track of a reoccurring schedule?
One of the most valuable tools in planning and executing an event is a detailed schedule. Follow the steps below to create a default timeline.

1. Click **Administration** > **Lists** > **Default Timeline Items**.
2. To add a new default timeline, click the **Add New Timeline** button , located on the left-hand side of the screen.
3. Click **Yes** to confirm your choice.
   Result: *A new, empty field is added.*
4. Type the name of the new timeline into the highlighted field.
5. Press [**Enter**] to save your timeline.



Viewing an Existing Timeline

1. Click the **Event Timeline** button, located on the lower right-hand side of the Event Manager screen.
2. Click the **View or Select from Default Timeline Items** button, located on the top right-hand side of the window.
1. To add an existing timeline item to a particular event, click the desired timeline category from the left-hand pane of the window to select it.
   Result: *All timelines which have been added to the category you selected will display*.
2. Select an item or items you would like to retrieve and click **OK**.

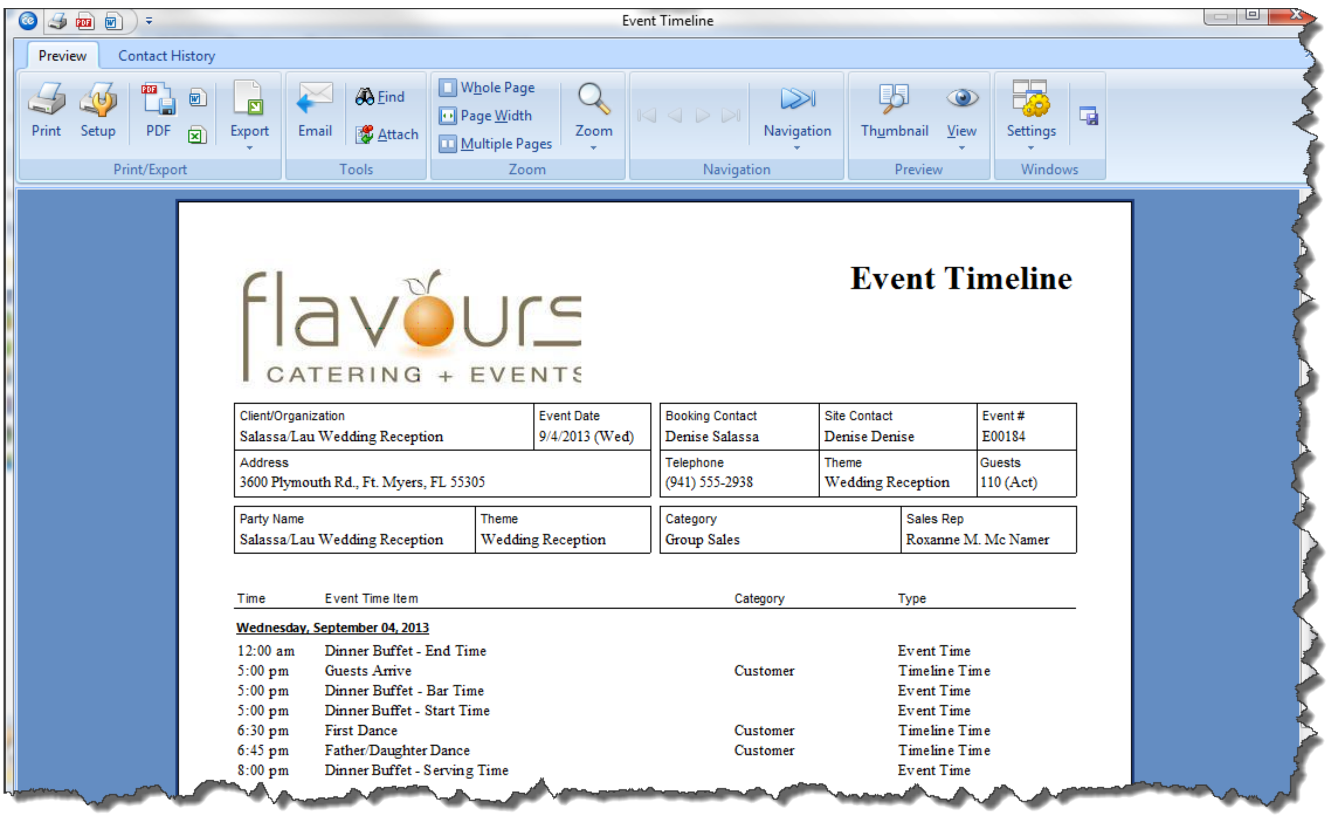
Adding an Event Timeline

1. Click the **Event Timeline** button, located on the lower right-hand side of the Event Manager screen.

2. To add a new timeline to an event, click the **Add A New Timeline** button, located on the right-hand side of the Event Timeline window.
3. Type the time the timeline item is due into the Time field. Alternatively, you may use the up and down arrows to select a time.
4. Type a description of the timeline item into the Timeline Item field.
5. Select a Category (Front of House, Back of House, etc.), by clicking the drop-down list to the right of the Category field to indicate who is responsible for completing the timeline item
6. To add notes related to the timeline item, click the **Show Timeline Item Notes** button , located on the right-hand side of the Event Timeline window.
7. [**Optional**] Type notes into the text block as desired
8. After you have set your timeline, click the **Save** button, located at the top of your screen.

Printing an Event Timeline

1. With your event open in Event Manager, click the bottom half of the **Prints** button from the **Home** ribbon tab at the top of the screen.
2. Click **Event Subprints**.
3. Choose **Event Timeline**.
4. Click the **Print** button at the top of the Print Preview screen to send the print to a printer.

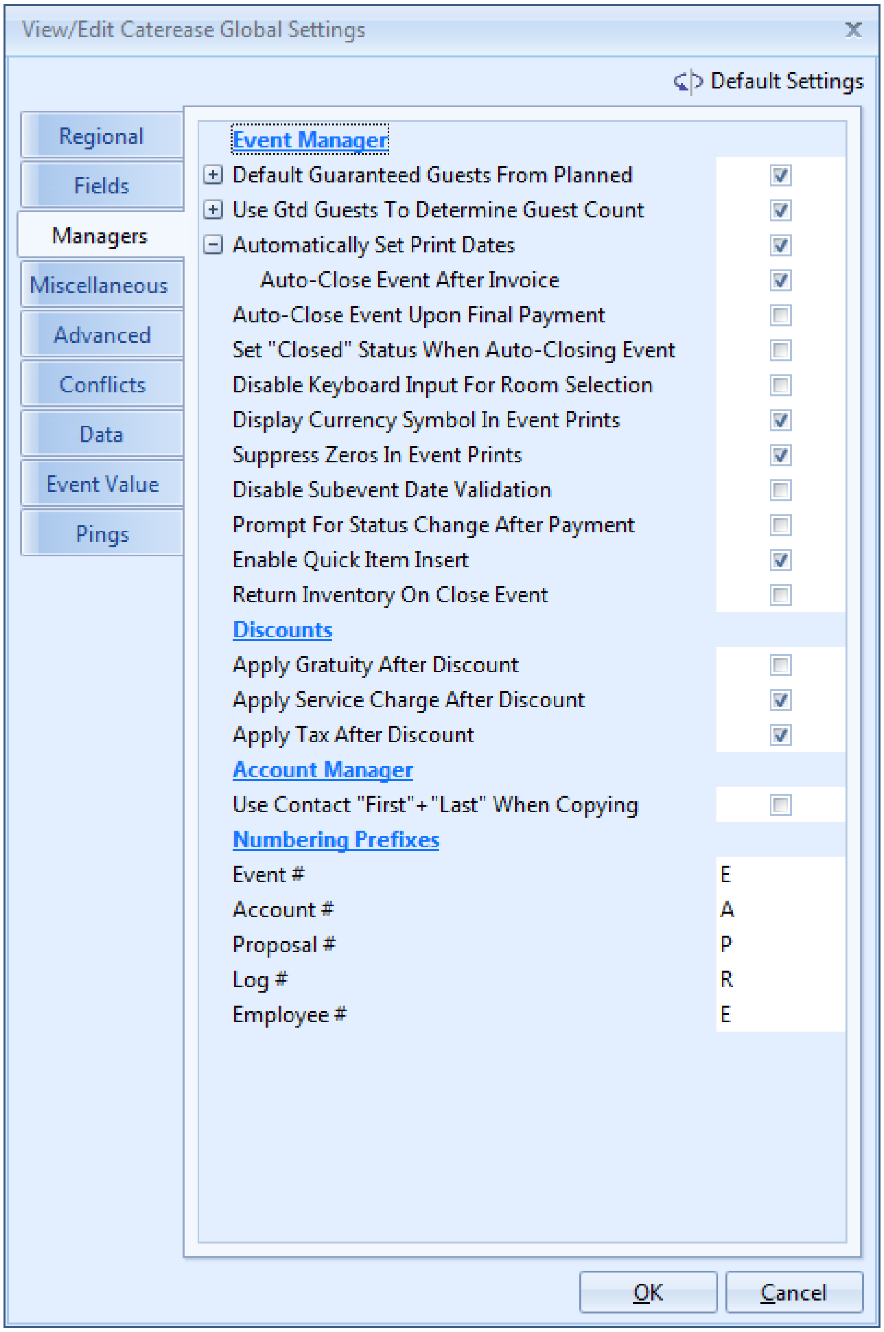


Global Settings: Managers Tab

What are "global settings"?
This screen allows you to make certain global changes to your program which will affect all users on your network.

Accessing the Global Settings Managers tab

1. Click **Administration** > **Settings** > **Global Settings** at the top of the screen and click the **Managers** tab.



Available Options

- **Default Guaranteed Guests From Planned**
  This option causes Caterease to default an event's Guaranteed Guest count to a certain percentage of the Planned Guest number. Click the plus sign to the left of this option to set the default percentage.

- **Default Percent**
  Sets the percentage for the default Guaranteed guest count (see above). Use the up or down arrow button to increase or decrease the percentage, respectively.

- **Use Guaranteed Guests to Determine Guest Counts**
  With this option selected, any event prints that show the general guest count, as opposed to specifically the Actual, Planned, or Guaranteed counts, will show the Guaranteed number if it is higher than the Actual number. Without this selected, the general Guest field shows the Actual count if there is one or, if not, the Planned Count.

- **Use Guaranteed Guests in Qty Linking**
  If you have any menu items with quantities linked to the guest count of your party, this setting will link those quantities to the Guaranteed guest count, as opposed to the Actual (or planned if there is no Actual count), as the default.

- **Automatically Set Print Dates**
  When you preview a print of a contract, invoice, or BEO, Caterease will automatically put the current date in the corresponding Event Specific Date field, if this option is checked.

- **Auto-Close Event After Invoice**
  Click the plus sign to the left of Automatically Set Print Dates if you wish to close events after an invoice has been generated. You can then deny certain users access to closed events (see Security Settings).

- **Disable Keyboard Input For Room Selection**
  Click this checkbox to require users to pick room names from their list rather than typing them by hand. Click it again to allow them to type room names by hand.

- **Auto Close Event Upon Final Payment**
  This setting will cause an event to be closed when a payment is posted that brings its balance due to $0. Closed events can optionally be locked for various users through the program's Security features.

- **Notify Upon Payment Method Changes**
  With this option selected, each time you post a payment to an event that has a different payment method from the event's default payment (selected on the Miscellaneous tab in Event Manager), you will prompted and asked if you want the event's payment method to be updated.

- S**et Closed Status when Auto-Closing Event**
  With this option selected, Caterease will automatically set the event status as Closed whenever you auto-close an event.

- **Disable Keyboard Input for Room Selection**
  Click this checkbox to require users to pick room names from their list of rooms rather than typing them by hand.

- **Display Currency Symbol In Contracts**
  This option causes the local currency symbol ($ in America) to print next to the totals in the financial summary section of contracts and BEO's.

- **Suppress Zeros in Event Print**
  Click this checkbox to suppress the zero in items that have no quantity set and the $0.00 on items that have no price in Invoice, Contacts, and Marketing Tools documents.

- **Disable Sub-Event Date Validation**
  Whenever you change an event date in Event Manager, the date(s) of your sub-event(s) are updated automatically. If you check this option, that sub-event date validation will be disabled, meaning any change to an event date will have no effect on its sub-events.

- **Prompt for Status Change after Payment**
  When you post a payment to an event, you most likely want the status of that event to be Definite. With this option checked, Caterease will prompt you if you post a payment to an event that is not Definite, and will even automatically change the status for you, if desired.

- **Enable Quick Item Insert**
  This setting is available in the Professional version. With this option selected, the user is able to use the down arrow on the Item Name tab to access a list of commonly used menu items.

- **Apply Gratuity after Discount**
  With this option selected, any discount you set in Event Manager using the Apply Discount tool will be applied prior to the gratuity being calculated for the event.

- **Apply Service Charge After Discount**
  With this option selected, service charge for an event will not be applied until any discount you might have set using the Apply Discount tool has been calculated. For example, an event with a total of $1000 and a 10% discount will have service charge applied to the discounted total of $900.

- **Apply Tax After Discount**
  With this option selected, tax for an event will not be applied until any discount you might have set using the Apply Discount tool has been calculated.

- **Use Contact First and Last When Copying**
  This setting is for your Account Manager. In Account Manager, you can copy a contact person's name, address, phone, etc., to the client so you don't have to type that information more than once. With this option selected, that copy will be in the format of First Name Last Name, as opposed to Last Name First Name.

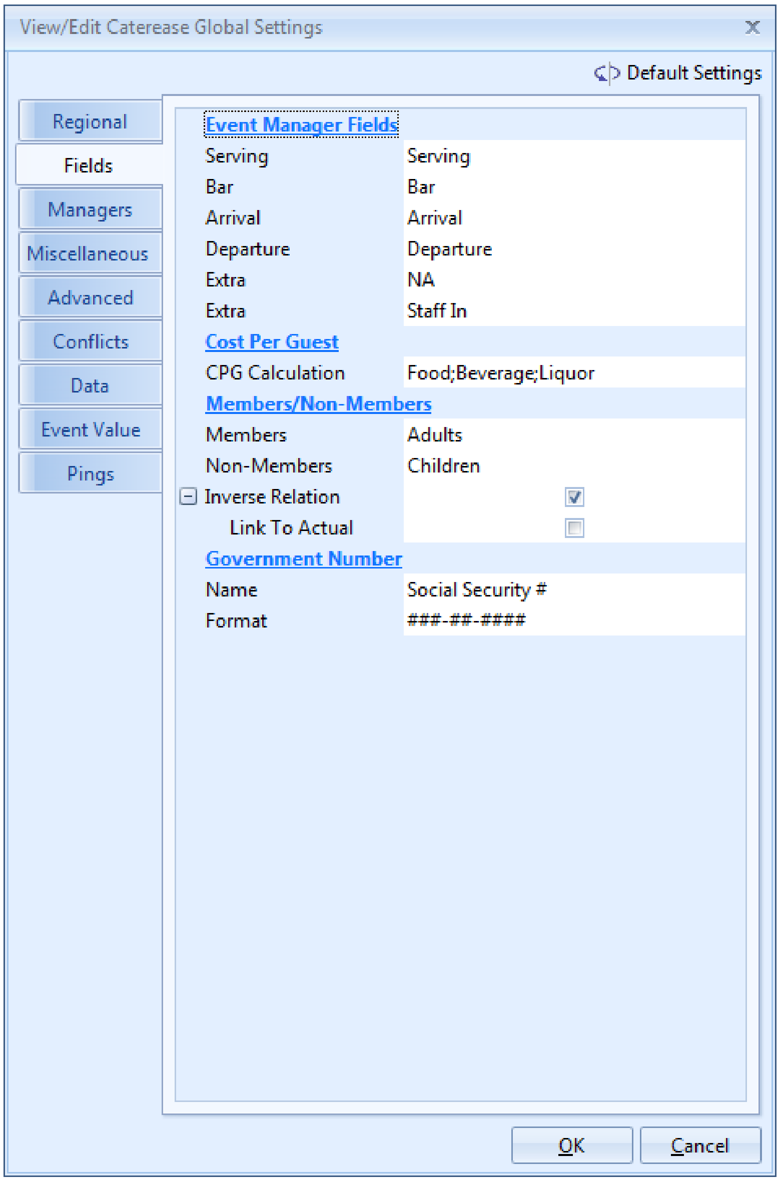
- **Numbering Prefixes**
  Here you can change the default prefixes of numbers assigned to all new events, accounts, proposals, etc., by entering up to three alternative characters (numbers, letters, or symbols).

Global Settings: Fields Tab

What are "global settings"?
This screen allows you to make certain global changes to your program which will affect all users on your Caterease network. Specifically, the Fields tab allows you to rename certain fields in the program to better suit your company's needs. Options are listed below.

Accessing the Global Settings Fields Tab

1. Click **Administration** > **Settings** > **Global Settings** at the top of the screen.
2. Click the **Fields** tab at the top of the form.



Available Options

- **Time Fields**
  You can rename six of the time fields used in Event Manager. You, as the end user, can determine which of these time fields are displayed on your Event Manager screen.

- **CPG Calculation**
  This setting allows you to determine which financial totals should be used when calculating the cost per guest of your events. Options include food totals, liquor, beverages, equipment, labor, room, and other fees, as well as any additional adjustments you make in the event's tax/service charge window.

- **Members/Non-Members**
  Here you can rename these additional guest fields. Examples include Adults and Children, Vegetarian and Non-Vegetarian, etc.

- **Inverse Relation**
  By default, the Members and Non-Members guest count fields have an inverse relationship. That is, if a guest does not fall into one of those categories, he must fall into the other. (With this relationship, the most common name change to these fields is "Adults" and "Children" - if you're not one, you must be the other.) For example, if there are 100 guests at a party and you enter 60 into the Members field, Non-members will default to 40.

- **Link to Actual**
  With this checkbox selected along with the one above, the inverse relationship extends back to the "Actual" guest count. Using the example above, if you then changed the Non-Members number to 45, the Actual guest count would automatically update to 105. With this option disabled, any changes to the Members/Non-Members fields will not affect the Actual guest count.

- **Name/Government Number**
  Use this field to change the name of the government ID number (called Social Security # by default).

- **Format**
  Here you can establish the format for the government number field in the program- whether numbers, letters, or other characters (dashes, periods) are permitted or even required

Setting up the Scratch Pad

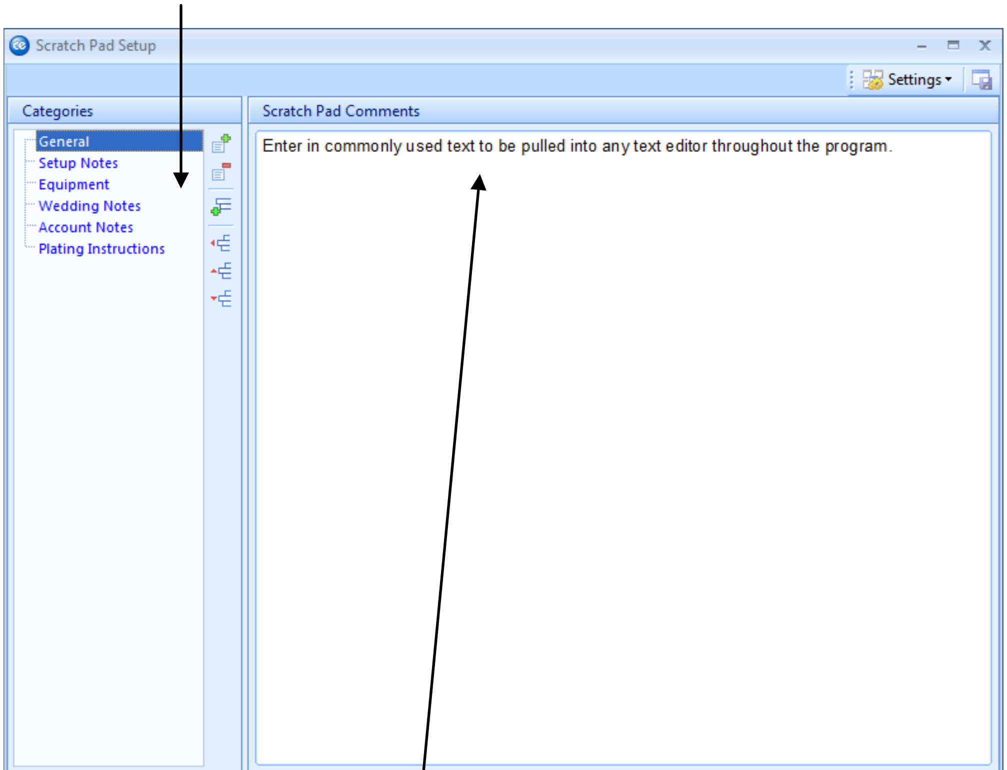
What is a Scratch Pad?

The concept behind your Scratch Pad is that you should be able to insert commonly used text throughout the program with one mouse click rather than typing the same stuff over and over. To that end, you can create a Scratch Pad with all of your normal comments, special requests, setup notes, etc., and even separate them into various categories to make locating the right notes easier.

Setting Up the Scratch Pad

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Lists** button and choose **Scratch Pad**.
3. Click the **Add Record** button, located directly beside the list of categories in the panel on the left.
4. Type a name for your new category. Categories are used to break your Scratch Pad up and make locating certain notes easier. Examples might include "Setup Notes," "Equipment," "Special Requests," etc.
5. Press your **[Enter]** key.
6. Click in the large white text block on the right of the Scratch Pad Setup form and type notes for this category as desired.
7. Format your scratch pad text using the Format toolbar located at the top of the screen.

Add any number of categories to organize your Scratch Pad



Click into the text block and type commonly used text

Using the Site Location Database

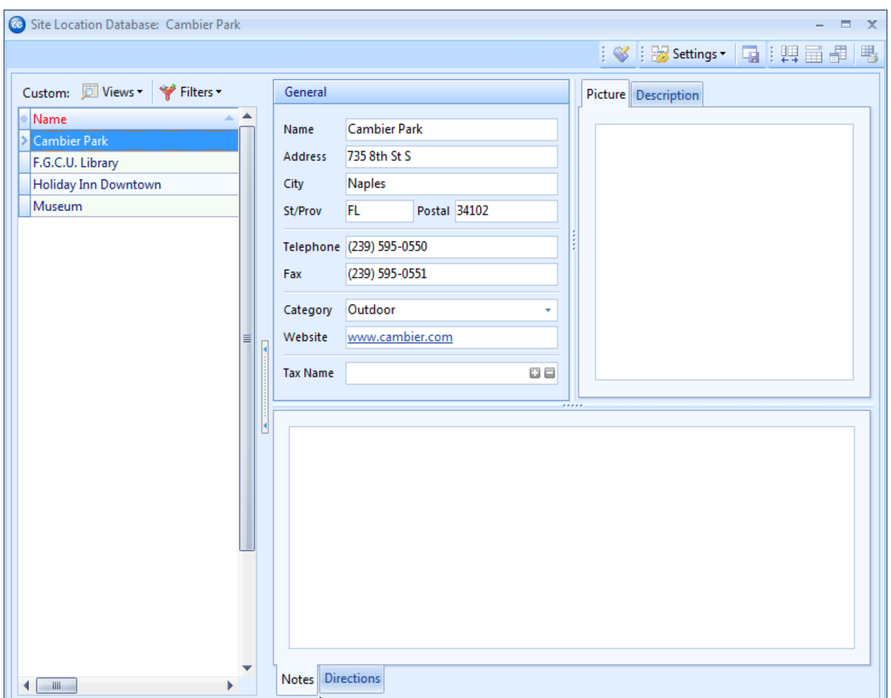
What is a Site Location Database?
If you do any off-premise functions, the Site Location Database can save you lots of time in needless repetitive typing. You can enter a location into this database - its description, address, directions, etc. - and from that point on you will merely have to retrieve this information rather than type it all over again from event to event.

Accessing the Site Location Database

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Venues** button and choose **Site Location Database**.

Adding a New Site Location

1. Click the **Add New Record** button (green plus sign), located on the main toolbar at the top of the Caterease screen.
2. Type a name for the new location into the Name field and press your **[Enter]** key.
3. Type an Address, City, State, Zip, Telephone, Fax number and Website for the location, if desired, pressing **[Enter]** or [**Tab**] after each one.
4. Click the down arrow at the right side of the Category field and select a category for your location. This field is optional, of course, and can be used for tracking your site locations.
5. Click in the Picture field and add a digital picture of your location, if desired, by clicking your right mouse button and selecting **Load From File**.
6. Click in the Description text box at the bottom of the display and type as desired to add a more detailed description of the location. This text can be formatted using the **Format** toolbar at the top of your Caterease display.
7. Click in the **Notes** tab and type any notes specific to this location (or use your Scratch Pad to insert any existing notes into the field).
8. Click the **Directions** tab and type specific directions to the location. This text can also be formatted using the **Format** toolbar at the top of your Caterease screen.



Tabs to add Notes or Directions

Adding Banquet Rooms and Available Setup Styles (See image on following page)

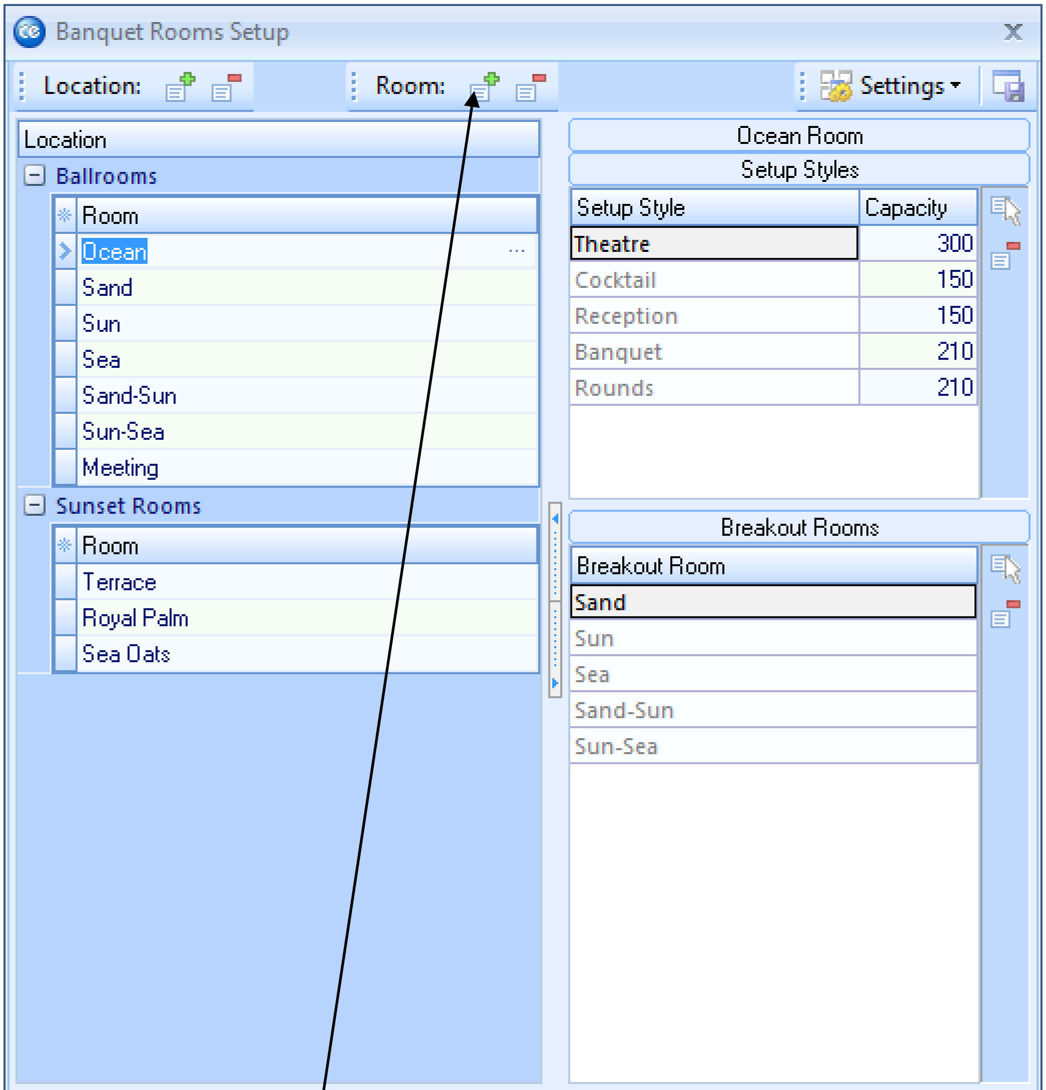
What information will Caterease need about our banquet rooms?
There are a couple of things to think about when you're adding banquet rooms to Caterease. First of all, you need to add the basic information: a name for the room, perhaps a category it might fit into for tracking purposes, a default diagram (if you are using that facet of the program) and maybe a default room charge. Secondly, you need to tell Caterease which setup styles apply to this banquet room, what the maximum capacities are, and what other rooms might be breakouts of this particular room. (This second topic will be discussed on the following page.)

Adding Banquet Rooms

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Venues** button and choose **Banquet Rooms Setup.**
3. Click the **Add Room** button on the top of the form.
   Note: *You can also optionally add multiple locations for your rooms, and even drag and drop rooms from one location to another. Locations are a particularly convenient way to organize rooms in your program's Event Scheduler (see later section).*
4. Type a name for your new room.
5. Optionally click the **Room Details** button to add a Category, Room Charge, Room Size, background Color (for Event Scheduler) and default Diagram for your room.
   Note: *The Category of a room can be used to track that banquet room. Examples might include "Ballroom," "Meeting Space," etc.*
6. [**Optional**] Click the **Notes** tab to add Notes about the banquet room.
7. Optionally add a digital picture of your new setup style by clicking the **Picture** tab, clicking your right mouse button and selecting **Load From File**.
8. When finished, close the Room Details window.

Adding Setup Styles to the Default Setup Styles List

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Venues** button and choose **Setup Styles.**
3. At the top right of the Setup Styles form, click the **Add New Setup Style** button.
   Note: *If you are using the interface with Room Viewer, you may want to click the* ***Add Room Viewer Setup Style*** *button to automatically populate this list with styles your diagramming program will recognize.*
4. Type a name for the new setup style.
5. Optionally click in the *Notes* text window at the bottom of the Setup Styles form, and type any notes that pertain to your new setup style.
6. Optionally add a digital picture of your new setup style by clicking the **Picture** tab, clicking your right mouse button, and selecting **Load From File**.
7. When finished, close the Setup Style Details window.



Click the green plus sign to add a new room

Assigning Setup Styles and Capacities

Didn't we already talk about adding setup styles on the previous page?
The previous page deals with creating your default list of setup styles – all setup styles that would ever be used in any room. This page discusses selecting particular setup styles that apply to particular rooms, as well as entering the maximum capacity of guests for each setup style.

Selecting Setup styles and Capacities

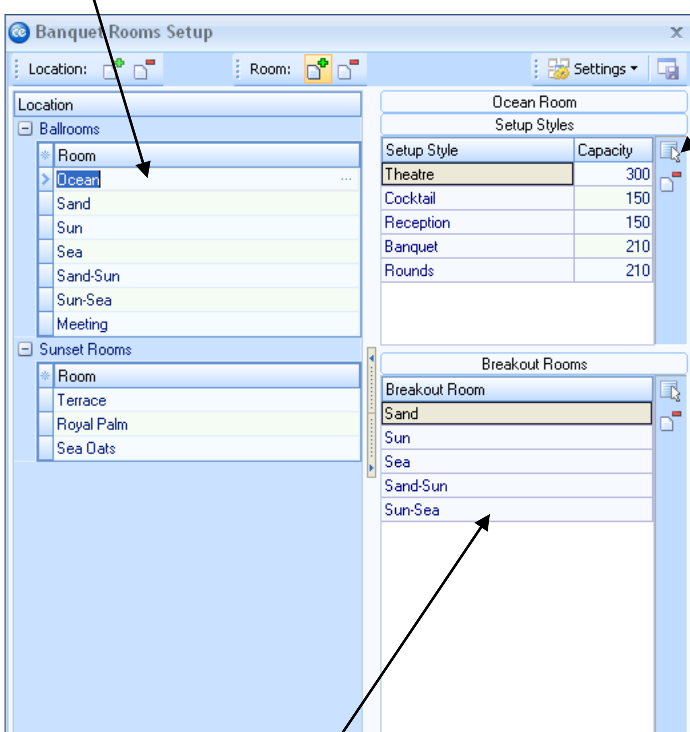
1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Venues** button and choose **Banquet Rooms Setup.**
3. On the left side of the Banquet Rooms Setup window, select the desired banquet room.
4. At the right of the display, click the **Select Setup Style** button.
5. Highlight any setup style(s) that apply to the selected room.
6. Click the **Select Setup Styles** button to add the selected setup styles to your banquet room.
7. Click in the <u>Capacity</u> field beside each setup style on the **Banquet Rooms Setup** tab and type a maximum capacity for the selected room. If you desire, you can click the down arrow at the right of the Capacity column and use the available calculator to determine a maximum capacity.

Establishing Breakout Rooms

1. On the left-hand side of the Banquet Rooms Setup window, select the desired banquet room.
2. At the lower right of the display, click the **Select Breakout Rooms** button.
3. Highlight any banquet room(s) that are breakouts of the selected room. For example, if you have a *Ballroom ABC*, then its breakout rooms might be *Ballroom A*, *Ballroom B*, *Ballroom C*, *Ballroom A-B* and *Ballroom B-C* (all possible rooms that can be formed by "breaking" the large ballroom apart).
4. Click the **Select Banquet Rooms** button to add the selected breakout rooms to your selected room.

Setup Styles/Capacities/Breakouts reflect currently selected room

Click the Select Setup Style button to retrieve setup styles



"Breakout Rooms" are smaller parts of the currently selected room

Banquet Room Blocking

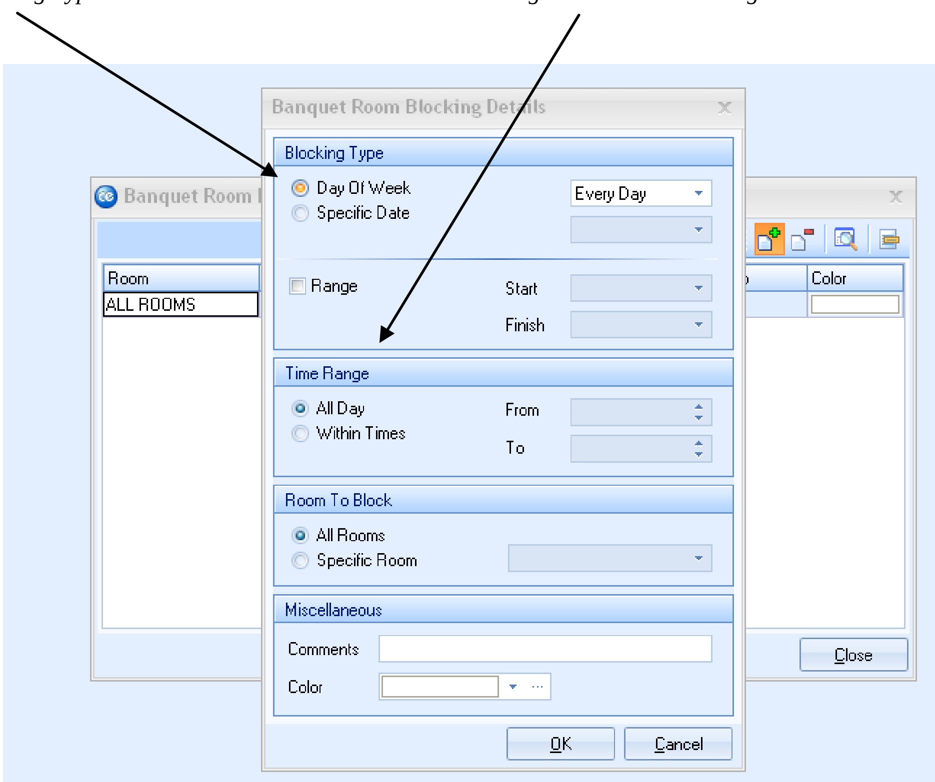
What is the purpose of Banquet Room Blocking?

Banquet room blocking allows you to block a function room without the need of booking an entire order.

Adding a Room Blocking

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Venues** button and choose **Banquet Rooms Blocking**.
3. Click the green plus sign button to add a new blocking. Choose either *Day Of The Week* to apply room blocking on that day every week, or *Specific Date* for one-time only blockings.
4. Enter the <u>Time Range</u> you would like to block the room.
5. Click the down arrow to select the room you would like blocked. Choose *All Rooms* to block the entire facility or Specific Room to select a certain room (choose from the drop-down list).
6. [**Optional**] Type in the reason for blocking in the <u>Comments</u> field.
7. [**Optional**] Select a color to associate with the room-blocking.
8. Click **OK** when finished.
9. Repeat process for additional room blockings.

Select Blocking Type *Enter Date Range OR Enter Time Range*



Unit 26: The Backstage Tab

Topics covered in this unit include:

The Information Tab
The Dashboard
Recent Activities
Support
Instant Messaging

Using the Backstage Tab

What is a "Backstage" Tab?

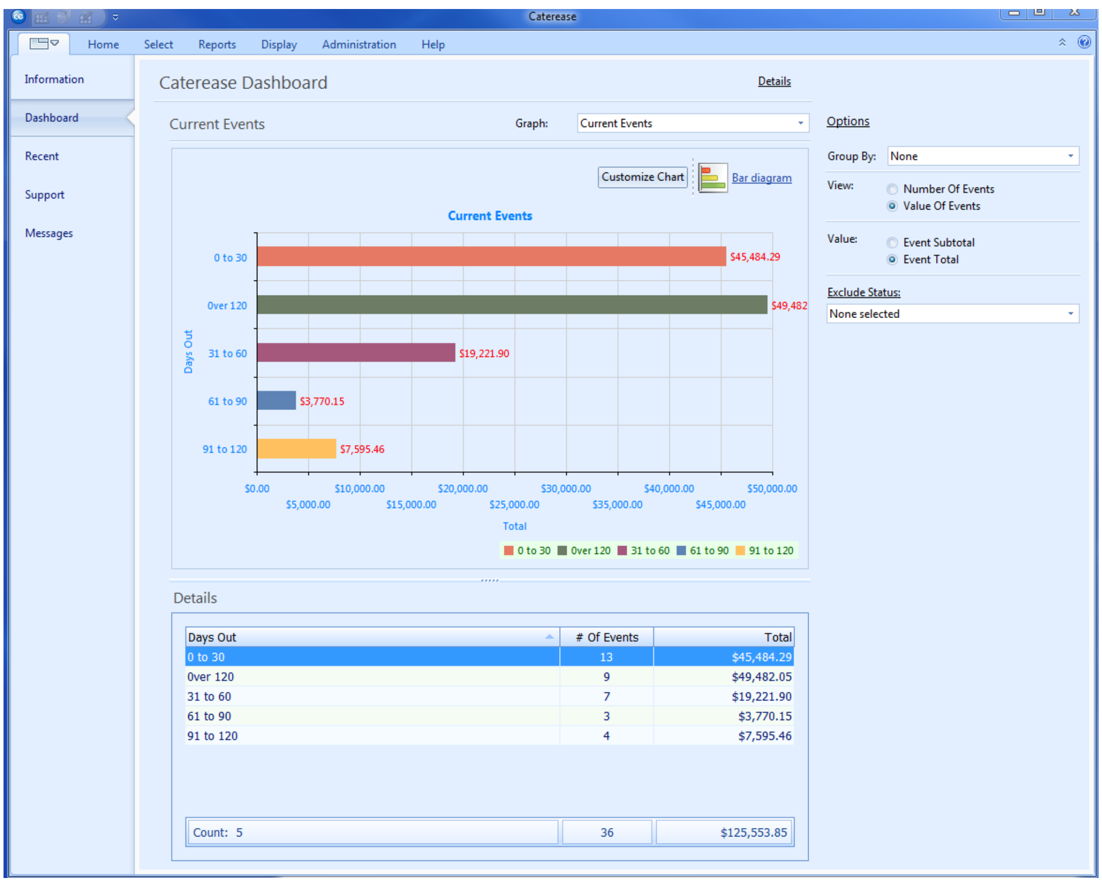
You may not be familiar with the term "backstage, "but you know the concept. In Microsoft Office products such as Word or Excel, the backstage ("File") tab allows you to print, as well as offering various options such as a list of most recently edited documents or files. In Caterease, the **Backstage** tab gives you access to many exciting tools, including: Information; Dashboard (Professional version only); Recent; Support; and Messages.

Information

This tab automatically updates from the Caterease website, and offers such information as latest news about the program, introductions to new features and even access to handy video tips.

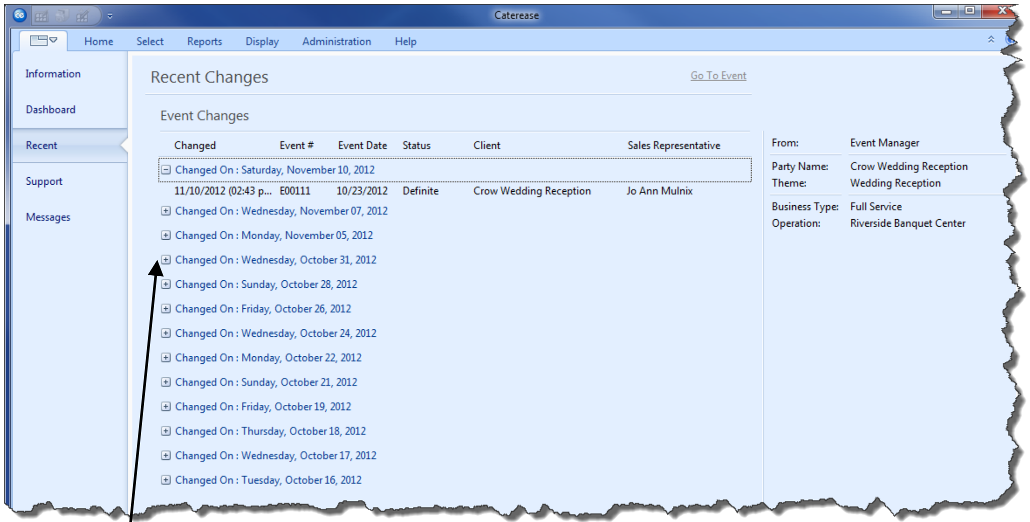
Dashboard

This tab offers a quick-access view of what is going on with your company. Various style graphs can be displayed to show current event activity, accounts receivable or even contacts made by your Caterease team. Separate information into groups (to determine, for example, which rep has the most A/R, or how many outgoing phone calls or emails have been logged), and even drill down into each group for more information. A grid at the bottom of the tab offers more details about the results, as well.



Recent

This tab shows a list of all events that have been recently edited by the current user. Double-click on any event to retrieve it into Event Manager.



Click the plus sign to view the details

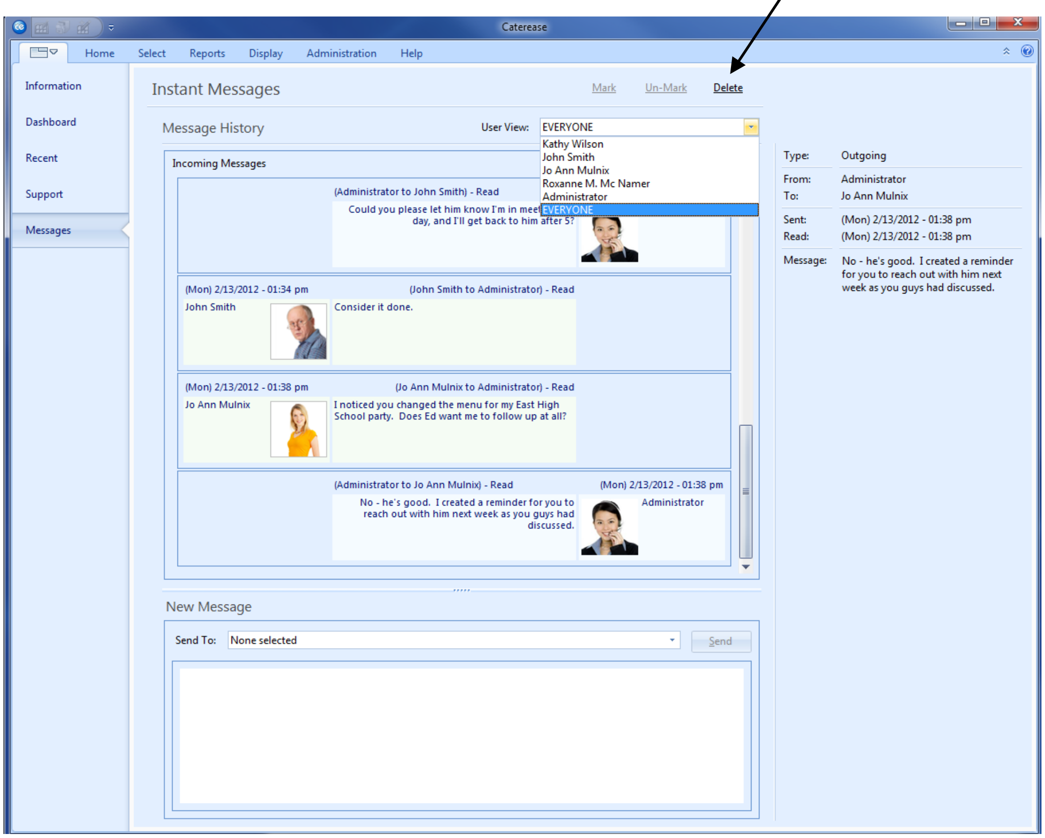
Support

This tab allows you to download such documents as our User License, Maintenance Agreement or even various user guides. In addition, you can email our HelpDesk directly from here, or access their phone number.

Messages

This tab gives you the exciting opportunity to send user-to-user instant messages, so you can quickly share important information with the rest of your Caterease team!

To delete a message, click on the message and click the Delete button



Unit 27: Backing Up Data and Managing Deleted Events

Topics covered in this unit include:

Performing a Backup
Saving Backups Remotely
Archiving Your Events
Tracking Deleted Events

Performing a Backup

How often should I backup data?
A backup of your program's data should be done every single workday. If the morning has been busy, you might want to run a backup at lunchtime and again at quitting time. These backups may never be needed. Think of them as an insurance policy against data loss or corruption. If something happens to your computer's hard drive or if you suffer data corruption, a backup can be quickly restored. The procedure described here backs up your data onto your Caterease server's hard drive. You may want to use a zip drive, a write-able CD or a tape to store data remotely in case of hard-drive failure.

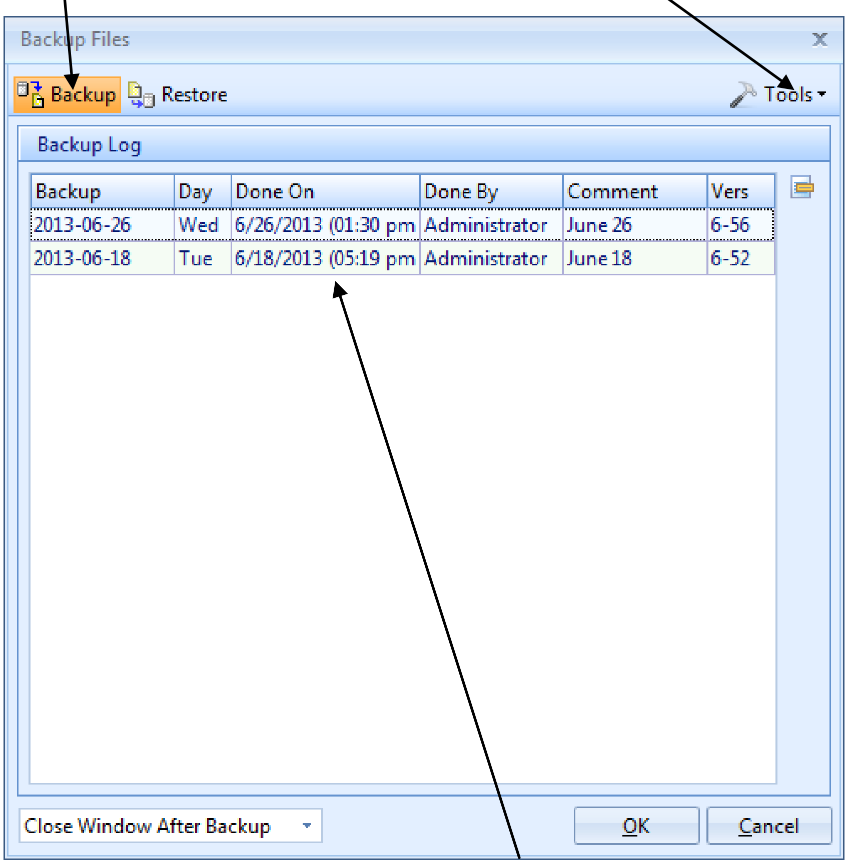
Running a Backup

1. Click the **Backup Data** button on the **System** sidebar.
2. Click **Backup** at the top left of the form, if it is not already selected.
3. Click **OK**. The backup will automatically be done. The Backup file will be named starting with BU and followed by numbers which denote the year, month, and day, i.e.: BU2013-06-26.

E-mailing a Backup

1. Click the **Backup Data** button on the **System** sidebar.
2. Select a backup from your list of recent backups.
3. Select **Tools - Email Backup as Zip File**.
4. Enter the e-mail address in the <u>Send To</u> field.
5. Enter the body of the e-mail in the <u>Message</u> window. The name, address and phone number of your company will be automatically added to the bottom of your message.
6. Click **Send**.

***Backup** button* *Optional Tools, including Save Backup as Zip File*



List of previously run backups

Backing Up Your Backup

What happens if my server's hard drive fails?
You might have noticed the Caterease backup is automatically saved on the hard drive of your Caterease server (or on your machine if you are not using a network). There is the possibility that your server's hard drive could melt down. Considering that all of the data of your entire business operation is located there, this could be a major disaster. It is therefore prudent to save your backup to some external location as well as on your server. You could save to a CD, to a zip drive or to a tape. (Bear in mind, however, that if you choose to use a tape backup, make sure that the backup includes **ALL** files and ***not just those that have been modified***.)

Other Practical Alternatives

You might also e-mail your backup to your home or you could save it across your office network to another computer. The chances that two computers would fail at the same time are slim. Getting your backup to another location entirely in case of fire is another logical consideration.

How Often Should You Backup Your Backup?

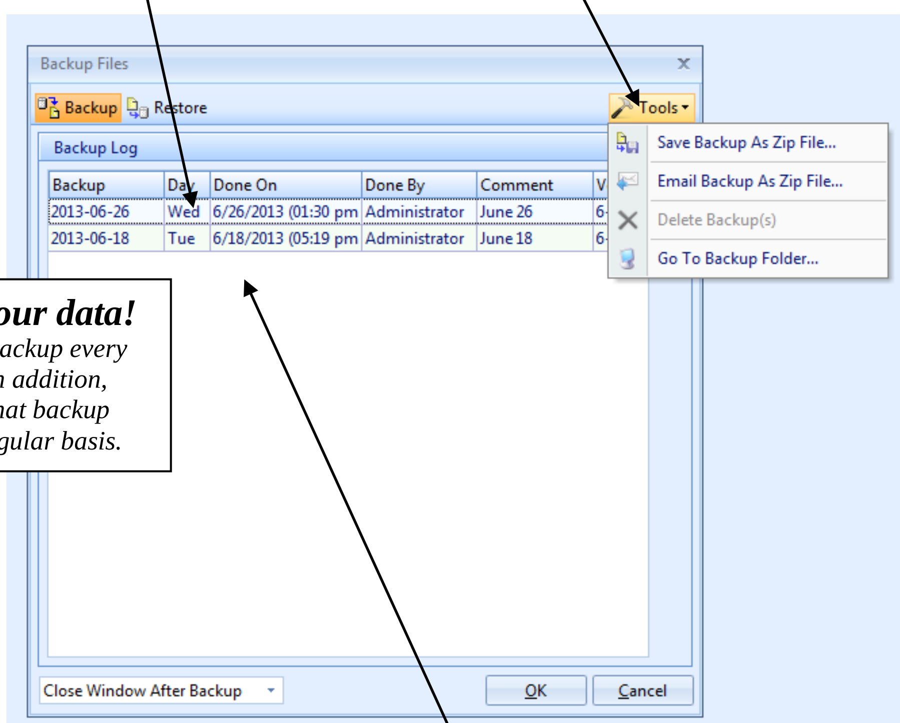
This depends on the volume of business. How long would it take you to recoup a week's worth of lost data? We recommend creating a secondary backup no less often than once a week. Daily would be ideal.

How is an Alternative Backup Performed?

1. Run your normal backup (see previous page).
2. If your Backup Files window automatically closes, click the **Backup Data** button again to reopen it.
3. Click on the backup file you just created to select it.
4. Click on the **Tools** button – there will be a drop down menu displayed with Delete Backup(s), Save Backup As Zip File, Email Backup as Zip File.
5. Select **Save Backup File As Zip File**.
6. On the Save As window, type in a File name, and click **Save**.

Click a backup to select it

*Click **Tools** and choose **Save Backup**… or **Email Backup**…*



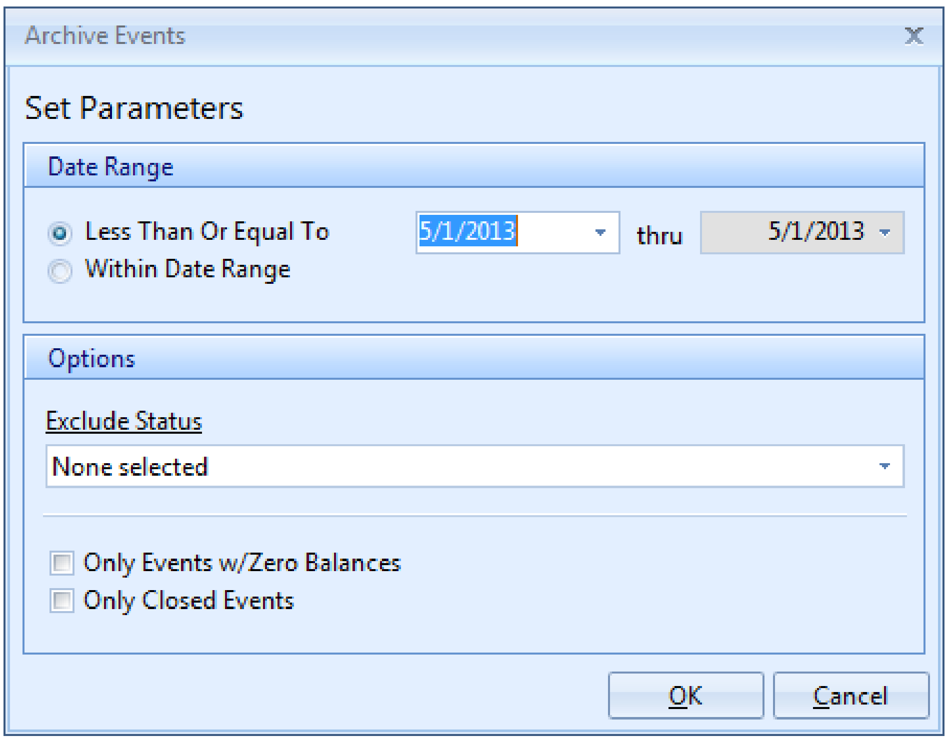
Safeguard your data!
Be sure to run a backup every single workday. In addition, you should save that backup externally on a regular basis.

Click and choose location to save a copy of your backup

Archiving Your Events

This feature allows you to archive old events so they are not part of your everyday database.

1. From the **Administration** tab, click the **Archive** button.
2. Select **Archive Events**.
3. Select a Date Range by choosing the option Less Than Or Equal To or Within Date Range.
4. If selecting Within Date Range, click the down arrow and choose a date from the drop-down calendar. All events prior to this date (and matching the options you choose below) will be archived.
5. Click under **Options** > **Exclude Status** to suppress events with a status of Definite, Tentative, Prospective, Closed, Cancelled.
6. **Only Events with Zero Balances**-Select this option to archive events only if they have zero balances (i.e., they do not owe money).
7. **Only Closed Events**-Select this option to only archive events for which you have entered Closed dates in Event Manager.
8. Click **OK** to generate the query. (Note: You will be prompted to run a Database Refresh.)



Tracking Deleted Events (See image on following page.)

I thought when I deleted an event it was "gone"?
Deleted events are indeed removed from your program's live data. You will no longer find them in Event Manager, in your Event Scheduler, in any queries or on any reports. The Deleted Events feature, however, functions like the Recycle Bin in your Windows operating system: Any events you delete will remain in your Deleted Events window and can even be restored (if you have the Professional version). Once you remove an event from your Deleted Events window, it is then gone for good.

Accessing Deleted Events

1. Click the **System** sidebar group on the left side of your main screen.
2. Click **Deleted Events**.

Finding Specific Events

1. Sort the list of deleted events by clicking any column heading.
2. Use the Incremental Search tool, located at the top left of the Deleted Events window, to quickly locate an event.

Restoring Deleted Events (Professional version only)

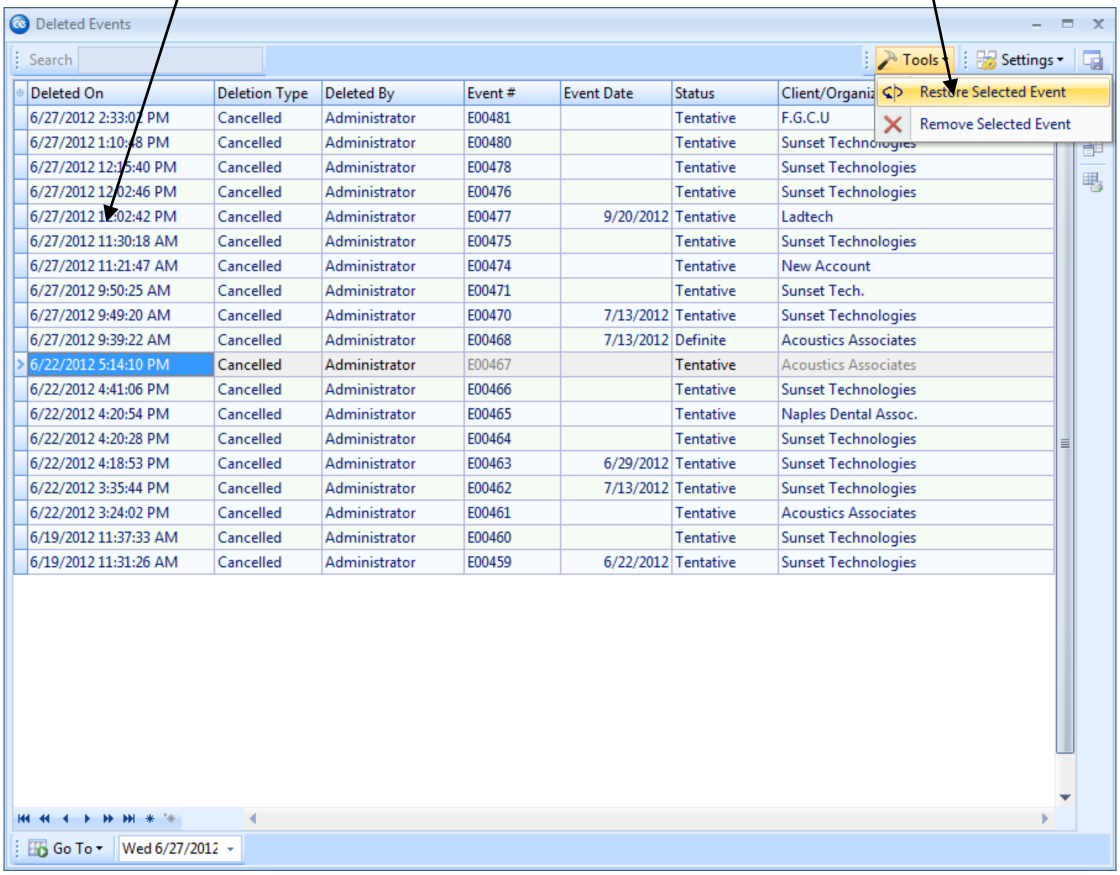
1. Click a specific event to select it, or hold your **[Ctrl]** key down to highlight multiple events.
2. Click the **Tools** button at the top of the Deleted Events widow.
3. Select **Restore Selected Event(s)**.
4. Click **Yes** to confirm.
   Note: *If you have chosen to restore only one event, you will be asked if you want to retrieve it into Event Manager.*

Removing Deleted Events

1. Click one or more events to select them.
2. Click the **Tools** button at the top of the Deleted Events window.
3. Select **Remove Selected Event(s)**.
   <u>WARNING: Clicking "Yes" on this message (Step 4, below) will PERMANENTLY remove these events from your database.</u>
4. If you want to permanently remove the selected events from your database, click **Yes**.

Deleted Events *is in the System Sidebar Group*

Select Events and Click ***Tools*** *>* ***Restore Selected Events***



Deleted On	Deletion Type	Deleted By	Event #	Event Date	Status	Client/Organiz
6/27/2012 2:33:02 PM	Cancelled	Administrator	E00481		Tentative	F.G.C.U
6/27/2012 1:10:48 PM	Cancelled	Administrator	E00480		Tentative	Sunset Technologies
6/27/2012 12:15:40 PM	Cancelled	Administrator	E00478		Tentative	Sunset Technologies
6/27/2012 12:02:46 PM	Cancelled	Administrator	E00476		Tentative	Sunset Technologies
6/27/2012 12:02:42 PM	Cancelled	Administrator	E00477	9/20/2012	Tentative	Ladtech
6/27/2012 11:30:18 AM	Cancelled	Administrator	E00475		Tentative	Sunset Technologies
6/27/2012 11:21:47 AM	Cancelled	Administrator	E00474		Tentative	New Account
6/27/2012 9:50:25 AM	Cancelled	Administrator	E00471		Tentative	Sunset Tech.
6/27/2012 9:49:20 AM	Cancelled	Administrator	E00470	7/13/2012	Tentative	Sunset Technologies
6/27/2012 9:39:22 AM	Cancelled	Administrator	E00468	7/13/2012	Definite	Acoustics Associates
6/22/2012 5:14:10 PM	Cancelled	Administrator	E00467		Tentative	Acoustics Associates
6/22/2012 4:41:06 PM	Cancelled	Administrator	E00466		Tentative	Sunset Technologies
6/22/2012 4:20:54 PM	Cancelled	Administrator	E00465		Tentative	Naples Dental Assoc.
6/22/2012 4:20:28 PM	Cancelled	Administrator	E00464		Tentative	Sunset Technologies
6/22/2012 4:18:53 PM	Cancelled	Administrator	E00463	6/29/2012	Tentative	Sunset Technologies
6/22/2012 3:35:44 PM	Cancelled	Administrator	E00462	7/13/2012	Tentative	Sunset Technologies
6/22/2012 3:24:02 PM	Cancelled	Administrator	E00461		Tentative	Acoustics Associates
6/19/2012 11:37:33 AM	Cancelled	Administrator	E00460		Tentative	Sunset Technologies
6/19/2012 11:31:26 AM	Cancelled	Administrator	E00459	6/22/2012	Tentative	Sunset Technologies

Prints & Reports

The following can be generated from the **Reports** ribbon tab:

General

- **Daily Reader Board**
  Lists details of all sub-events taking place on the day you indicate.
  Fields printed include Client, Party Name, Start Time, End Time and Room.

- **Room Cards**
  Generates cards that can be placed in the entrances or doorways of your function rooms to indicate what parties will be held there.
  Fields printed include Client, Party Name, Start Time, End Time, Serving Time, Event Date and Room.

- **Monthly Planner**
  Generates a graphic calendar of an entire month, listing all sub-events taking place on each day.
  Fields printed on graphic calendar include Event Number, Client and Guests. Fields printed on subsequent detail pages include Event Number, Client, Phone, Booking Contact, Site Contact, Sales Rep, Theme, Start Time, End Time and Guests.

- **Annual Events**
  Generates a graph of annual events based on the number of events and the value of the events.

- **Active Reminders**
  Lists all current reminders for whatever user is logged into the program on this computer.
  Fields printed include Reminder Date, Client, Client Address, Client Telephone, Client Fax, Contact Person, Event Number (if the reminder is linked to an event), Event Date, Party Name, User Name (who is responsible for the reminder) and reminder details.

Window

- **Desktop**
  Prints a screenshot of the entire desktop of this computer.

- **Active Window**
  Prints a screenshot of whatever program window is currently active.

Event Activity

- **Event Activity**
  Lists all events that have been added or modified during the date range you select.
  Fields printed include Event Number, Event Date, Client, Booking Contact, Category, Sales Rep, Booked Date and Revised Date.

- **Event Master**
  Lists all events taking place on the day and date range you indicate, along with their menu items and location information.
  Fields printed include Event Date, Event Number, Event Status, Party Name, Theme, Event Category, Client, Client Address, Contact Person, Telephone, Start Time, End Time, Serving Time, Guests, Room, Setup Style, Offsite Location, and food/service items with quantities.

- **Event Sheet**
  Lists details of all events taking place on the day and date range you indicate.
  Fields printed include Event Date, Event Number (with Status), Client Name, Theme, Event Category, Sales

Rep, Booking Contact, Sub-Event Date, Sub-Event Description, Start Time, End Time, Serving Time, Guests, Room and Site Name.

- **Event Checklist**
  Lists all duties that pertain to events taking place on the day and date range you indicate.
  Fields printed include Checklist Item, Due Date, notation if done, name of who it was done by and any checklist item notes.

- **Event Cancellations**
  Lists all cancelled events that were scheduled to take place on the day and date range you indicate.
  Fields printed include reason for cancellation, Event Number, Client, Event Date, Booking Contact, Telephone, Sales Rep, Theme, Cancellation Date, Cancellation Charge and total Event Value.

- **Event Bookings**
  Generates a report of all event bookings. The report can be grouped and sorted.

- **Event Conflicts**
  Generates a list of all room and staffing conflicts.

- **Audit Trail**
  Generates an audit trail, which can include any changes made to events, sub-events, food/service items, shifts, etc., and can be grouped and sorted as desired.

Forecasting

- **Revenue Forecast**
  Lists financial information for all events taking place on the day and date range you indicate, including breakdowns for food, beverage, liquor, equipment, etc.
  Fields printed include Client, Event Number, Date, Food Total, Beverage Total, Liquor Total, Equipment Total, Labor Total, Room Total, Other Total, Subtotal, Service Charge, Tax and Total.

- **Forecast to Actual Sales**
  This report, which allows you to determine if the actual sales for a particular year compare with the predicted sales for a particular year, can be based on the company as whole or particular sales rep.

- **Yearly Sales Comparison**
  This report allows you to generate a comparison, based on a particular year as compared with the current year.

- **Sub-Events Revenue**
  Lists financial breakdown for all sub-events taking place on the day and date range you indicate.

- **Consolidated Annual Sales**
  Gives your total monthly sales for the year based on one of several criteria: Event Category, Event Theme, Account City, etc.
  Fields printed include the Category, Theme or whatever criteria you base the report on; totals for each month including any combination of subtotal, tax and service charge you choose; and a similar total for the year.

- **Grouped Events**
  Shows a bar graph for a quick comparison of what references or marketing strategies have brought you the most business. Also on the report is a list of general details about each event, grouped by reference.
  Fields printed include Event Number, Client, Event Date, Booking Contact, Telephone, Sales Rep, Theme, Subtotal, Service Charge, Tax and Total.

- **Top Sales**
  This report provides a breakdown of top sales associated with a particular Client (up to the top 50), and is grouped by number of events and total revenue.

Financials

- **Commission Sales**
  Lists financial information and sales commission information for all events taking place on the day and date range you indicate. These events are grouped on the report by sales representative and according to status ("Definite", "Tentative" or "Cancelled").
  Fields printed include Sales Rep, Event Status, Event Number, Client, Date, Food Total, Beverage Total, Liquor Total, Equipment Total, Labor Total, Room Total, Other Total, Service Charge, the commission for each of these totals (based on the default commission percentage you have entered) and an overall Event Total.

- **Deposits Due**
  Lists all events with deposits due in a certain date range, as well as amounts and due dates of those deposits.
  Fields printed include the following fields for both deposits paid and due: Event Number (with Status), Event Date, Client, Phone, Booking Contact, Sales Rep, Deposit Due Date, Due Amount, Paid Date and Paid Amount.

- **Payments Made**
  Lists all events where payments were posted during the date range you select. Payment information is also on the print, including method of payment, amount, due date and any comment.
  Fields printed include Pay Date, Client, Event Number, Pay Method, Comment, Event Date, Pay Amount, Event Total and Booking Contact.

- **Accounts Receivable**
  "Accounts receivable" pertains to all events where the event date has passed, and yet they still owe you money. The Accounts Receivable report lists all events with money due whose event dates fall before your selected date. You can choose to ignore payments made after that date to get a true accounts receivable "as of" report.
  Fields printed include Sales Rep, Event Number, Client, Event Date, Theme, Total, Paid and Balance.

Management

- **Employee Staffing**
  Lists all events that your employees are schedule to work for a specific day or date range.
  Fields printed include Event Date, Employee, Employee Telephone, Employee Number, Position, Event Number, Client, Room, Start Time, End Time, Hours, Wage, Total Wage. Also available is the Employee Diary, including the following information: Employee Name, Employee Number, Event Date, Position, Start Time, End Time, Event Number, Client, Client Address, Client Telephone, Room, Party Name, Event Theme.

- **Scheduled Shifts**
  Lists specific shifts and staffing details.

- **Event Deliveries**
  Lists all events with delivery times on the day and date range you indicate, along with their menu items that require delivery and any notes or delivery personnel.
  Fields printed include Event Date, Event Number, Event Status, Client, Client Address, Client Telephone, Party Name, Event Theme, Event Category, Delivery Time, Start Time, End Time, Sub-Event Description, Guests, Delivery Person, Setup Person, Site Name, Room, Setup Style, Delivery Items, Delivery Notes.

- **Rooms Booked**
  Lists details of all events taking place in function rooms on the day and date range you indicate.
  Fields printed include Event Number, Event Date, Client, Booking Contact, Room, Theme, Guests, Start Time, End Time, Serving Time, Setup Time and Tear Down Time.

- **Scheduled Items**
  Provides a list of scheduled items (tables, bowling lanes, etc.), that have been scheduled. Can be grouped and displayed in graph format.

- **Food/Service Items**
  Lists all food and service items ordered for events taking place on the day and date range you indicate.
  Fields printed include Event Date, Event Number, Menu Item Name, Item Type, Item Category, Account Code, Price, Quantity, Total and optionally Prep Area.

- **Weekly Kitchen Plan**
  Provides a weekly list of items that are to be prepared, and the corresponding quantity.

- **Top Food/Service Sales**
  Provides a breakdown of the top-selling items (up to the top 50), and can optionally be sorted by quantity and value of items.

- **Required Items**
  Lists all required items for all events taking place on the day and date range you indicate.
  Fields printed include Description of Required Item, Quantity, Measure, Conversion, Associated Menu Item, Event Number, Event Date and Client.

- **Ingredients**
  Lists all ingredients for menu items in events taking place on the day and date range you indicate.
  Fields printed include Description of Ingredient, Quantity, Measure, Conversion, Associated Menu Item, Event Number, Date and Client.

Graphs

- **Accounts Receivable**
  Show receivables and corresponding events in donut and bar graphs, grouped by days outstanding.

- **Current Events**
  Shows two bar graphs indicating number and value of events, grouped by days out.

Accounts

- **Account List (Events)**
  A list of all accounts and their associated events, that have booked an event with you.

- **Account List (Guests)**
  A list of all accounts and their associated guestrooms, that have been booked with you. (Pertains to the Guestrooms Manager module).

- **Inactive Accounts**
  List of accounts that have never booked an event with you.

- **Account Origination**
  This report generates a list of all account bookings. *Fields printed include Client; Address; Phone; Fax; Sales Rep; Category; and Primary Contact.*

- **Total Accounts Receivable**
  A list of your accounts receivables as of a particular date.

Contact Manager

- **Total Contacts Made**
  Lists all contact history items for a day or date range. The report can be generated for one user or all users, and can be grouped as desired.

- **Total Reminders**
  Lists all reminders for a day or date range.

Menu Manager

- **Menu Items Usage**
  This report lists all menu items that have been used over a certain period of time.

- **Menu List (By Category)**
  This report lists all menu items, by category (if the menu items have been placed into a category.)

Guestrooms Manager

- **Guestrooms Control Log**
  This report allows you to track all group bookings. This report can be customized to exclude certain statuses, and can be grouped by selected criteria.

- **Guestrooms Breakdown**
  This report allows you to track guestrooms by a particular date range, and group them by group type or contract number.

- **Deposits Due**
  This report allows you to check all deposits made for a particular date range. You can optionally exclude contracts with a particular status.

- **Payments Made**
  This report allows you to check all payments received for a particular date range.

- **Accounts Receivable**
  The Accounts Receivable report lists, in bar graph view and in detail view, all group bookings with money due whose event dates fall before your selected date.