

Program Setup: Quick Reference Guide

General Setup/Customization

Set Up Default Tax, Services Charges, and Gratuities

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Tax/Service Charge Rates**.
3. Enter a new tax rate for your Food items by typing the number into the field.
4. Repeat as desired to enter default tax rates for all other item types.
5. Optionally continue to add rates into the Second and Third tax columns as desired.
6. Optionally click the **Tax Schedules** button to create multiple tax schedules, which can be assigned to individual customers or site locations used for an event.
7. Continue to add rates for default Gratuity and/or Service Charge for each type of item.
8. **[Optional]** Click into the **Tax Exempt** checkbox to make all new events default to Tax-Exempt.
9. **[Optional]** Enter whole dollar amounts into any of the fields under **Additional Adjustments** to add that amount to the subtotal, tax, gratuity, or service charge of all new events.
10. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Establishing_Default_Tax_Rates.htm.

Rename Existing Fields

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Customize Names**.
3. Click into any field and type a new name for the field as desired.
4. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Renaming_Fields.htm.

Create User-Defined Fields

1. Click the **Setup** sidebar.
2. Click the **User Defined Fields** button.
3. Click the appropriate tab for the type of field you are creating.
For example, click the **Events** tab for your Event Manager, **Accounts** tab for your Account Manager, etc.
4. Click into the first available user-defined field and type the new field name as desired.
5. Click the down arrow to the right of the Type field and select a format type for this field.
6. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Creating_User_Defined_Fields.htm.

Add User-Defined Fields to Your Screen

1. In Event Manager (or other "Manager"), click your right mouse button on the tab where you would like to place the user-defined field.
2. Click **Customize**.
3. Hold your left mouse button down on one of the available fields.
4. Drag the field into the desired location on your screen, and then release your mouse button.
5. Click the **Save Current Window Settings** button  to retain the settings.

See http://support.caterease.com/12/helpmenu/Event_Manager/Customizing_the_Event_Manager_Display.htm



Multiple tax rates are often used by European or Canadian companies, and can also be used in the U.S. to track separate City, State, and County taxes.



Many fields in Caterease can be renamed using the steps described here. For example, you might prefer the name "Booking Agent" to Sales Rep, or "Scheduled Tables" to Scheduled Items. You can also use the **Fields** tab in **Global Settings** to rename event time and guest fields.



You can create user-defined fields to keep track of information (about your clients, events, menu items, etc.), that is unique to your company. These fields can be displayed anywhere in their respective areas of the program or on prints.

Set Up/Customize Quickpick Lists

1. Click the **Setup** sidebar.
2. Click the **Quickpicks** button.
3. Click the **Expand** button (triangle) to the left of any quickpick category to expand the selection.
4. Click on the name of the sub-category you would like to add a quickpick item to.
5. Click the **Add Item** button , located at the top of the window, to add a new quickpick.
6. Type the name of the quickpick into the field.
7. When finished adding quickpicks, click **Close**.

See http://support.caterease.com/12/helpmenu/Setup/Customizing_Quickpick_Lists.htm

Establish Required Fields

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Required Fields**.
3. Click the tab representing the area of the program where you want to create required fields. For example, click the **Events** tab for your Event Manager, **Accounts** tab for your Account Manager, etc.
4. In the right-hand pane of the window, click the checkbox next to any field you want to designate as required information.
5. Optionally create conditionally required fields.
6. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Making_Fields_Required.htm.

Establish New Booking Defaults

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **New Booking Defaults**.
3. Click the tab representing the area of the program where you want to create new booking defaults.
4. Enter information into the fields provided by typing directly into the fields or by selecting an option from the drop-down quickpick list.
5. Click into a checkbox to enable a default feature.
6. When finished entering new booking defaults, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Establishing_New_Booking_Defaults.htm

Set Up the Scratch Pad

1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Scratch Pad**.
3. Click the **Add New Category** button  located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for the new category and press **[Enter]**.
6. Click into the large white text block on the right-hand side of the window and type notes for this category.
7. Click the X at the upper right-hand side of the window.
Note: You will be prompted to save your changes.

See http://support.caterease.com/12/helpmenu/Setup/Setting_Up_the_Scratch_Pad.htm.



Various drop-down lists are available throughout Caterease, from which you can choose from a list of options, or “quickpicks.” Quickpicks allow you to keep your data entry consistent among users.



You can make certain fields “required” so that a record will not save without having the necessary fields filled in. You can even make certain fields conditionally required, meaning certain details are required for one type of event or customer but might not be required for others.



With New Booking Defaults you are able to set certain default values for various fields in the program. These values can be overwritten at any time, but they exist to save time when entering new events/accounts/prospects, etc., into Caterease.



You can avoid repetitive typing by storing large amounts of commonly used text, such as Comments, Notes, special requests, etc., into the Scratch Pad.

Add Users

1. Click the **Administration** ribbon tab and choose **Security**.
2. Verify that **Enable System Security** (top left of the window) is selected.
3. Click the **Users** tab.
4. Click the **Add User** button , located on the right-hand side of the window.
5. Enter a User Name for the new user.
6. Click the ellipse button to the right of the Password field to assign a password.
7. Click **Yes** at the confirmation prompt.
8. Enter a password for the user.
Note: You will be prompted to re-enter the password.
9. Click **OK**.
10. Click the **Security** tab on the left-hand side of the window and establish security settings.
11. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Security/Adding_a_New_User.htm

Add Sales Reps

1. Click the **Administration** ribbon tab and choose **Security**.
2. Type the Main Caterease Password into the Password field, and click **OK**.
3. Verify that **Enable System Security** (top left of the window) is selected.
4. Click the **Users** tab.
5. Click the **Add User** button , located on the right-hand side of the window.
6. Enter a User Name for the new user.
7. Click the ellipse button to the right of the Password field to assign a password.
8. Click **Yes** at the confirmation prompt.
9. Enter a password for the user.
Note: You will be prompted to re-enter the password.
10. Click **OK**.
11. Click the checkbox labeled **Is A Sales Rep**.
12. Type the user name into the Sales Rep Name field.
13. Optionally add any notes by clicking the **Notes** tab and typing into the text block.
14. Optionally add a picture by clicking the **Picture** tab and choosing an image.
Note: Add a picture by right-clicking into the field, selecting **Load From File**, and browsing to the image.
15. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Security/Adding_a_New_User.htm

Configure E-mail Settings

1. Click the **Administration** ribbon tab.
2. Click **Settings > Email Settings**.
3. Click the **New Record** button , located at the top left-hand side of the window.
4. Click on the new name in the user list and click the down arrow to the right of the field to select a desired user name.
5. Establish the appropriate e-mail settings in the right-hand pane of the window.
6. Optionally click the **Settings** tab and enter a signature, default CC List, and default BCC List to be associated with this user.

See http://support.caterease.com/12/helpmenu/Setup/Establishing_Email_Settings.htm



Once system security has been enabled in the program, no one will be able to open it without logging in. Although passwords will be optional, user names will be required. However, you can link to your Active Directory settings for Caterease to recognize user names and passwords used for Windows or Citrix (on Caterease Connect), and will not require a separate login for Caterease.



You can also choose a color to be associated with this sales rep when color-coding within the program, as well as entering direct phone, cell phone, and e-mail address information.



Each Caterease user can have his/her own unique e-mail settings, determining which e-mail account Caterease e-mails are sent through, as well as other options, such as a default signature.

Add Default Site Locations

1. Click the **Setup** sidebar.
2. Click the **Site Locations** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of the screen.
4. Type a name for your new site location and press **[Enter]**.
5. Enter additional information into each field.
Optionally add a Picture, Description, and Notes.
6. Optionally click the **Directions** tab at the bottom of the window and enter directions to the location.



Use this tool to establish a default site location for a client. Any details you enter here will default as the site location details for any new event created for this client.

See http://support.caterease.com/12/helpmenu/Setup/Entering_Site_Locations_into_the_Site_Locations_Database.htm

Set Up Default Timelines

1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Default Timeline Items**.
3. Click the **Add New Timeline** button , located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type over the name “New List” to rename your new default timeline, and press **[Enter]**.
6. Click the **Add New Timeline Item** button  to add a new timeline item.
7. Type a timeline item into the Item field, and press **[Tab]** to move to the next field.
8. Select a Category from the drop-down quickpick list.
9. Optionally type the time for the item to occur, into the Time field.
Note: You may also click the up-and-down arrows to select the time.
10. Optionally add any timeline notes by typing into the Notes text block, located on the **Notes** tab.
11. Click **OK**.



In addition to various time fields available in Event Manager, you can create a detailed timeline unique to each party. You can create these times on-the-fly from within an event, or select them from default lists.

See http://support.caterease.com/12/helpmenu/Setup/Creating_Default_Timeline_Items.htm.

Set Up Default Checklists

1. Click the **Administration** ribbon tab.
2. Click the **Lists** button and choose **Default Checklists**.
3. Click the **Add New Checklist** button , located on the left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type over the name “New Checklist” to rename your new default checklist, and press **[Enter]**.
6. Click the **Add New Checklist Item** button  to add a new checklist item.
7. Type a checklist item into the Item field, and press **[Tab]** to move to the next field.
8. Select a Category from the drop-down quickpick list.
9. Click the down arrow to the right of the Assigned To field to select the person responsible for the checklist item.
Note: You may also type the name directly into the field.
10. Optionally add any checklist notes by typing into the Notes text block, located on the **Notes** tab.



You can create a checklist of to-do items for your events, either by selecting them from a default list of tasks or by adding a custom task on-the-fly. You can also assign default due dates to these checklist items, telling the program to calculate a certain number of days after an event is booked or held, or even having that number conditionally change based on certain details.

See http://support.caterease.com/12/helpmenu/Event_Manager/Creating_a_Checklist_of_To-Do_Items.htm

Menu Setup/Customization

Customize Food/Service Item Types

1. Click the **Administration** ribbon tab.
2. Click the **General** button and choose **Food/Service Item Types**.
3. Click into the Type field and type the new food/service item type over “N/A.”
4. Click the down arrow to the right of the Image field and select an image from the drop-down list.
5. Click into the checkbox under the Active field to activate the new food/service item type.
6. Click into the **Associate Charges** area to associate a Room, Labor, Delivery, or Miscellaneous charge to the Item Type.
Note: You will need to assign tax/service charge rates for the new item type.
7. Drag and drop the item types into the desired position.
8. When finished, click **OK**.

See <http://support.caterase.com/12/helpmenu/Setup/Setting Up Food Service Types.htm>



You can establish up to eight food/service item types. Each of these types can be renamed and rearranged to suit your preferences.

Create Your Menu

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. Click the **Add New Menu** button , located on the upper left-hand side of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type a name of the new menu and press **[Enter]**.
6. Add a new menu item by clicking the **Add Menu Item** button , located at the top of the Menu Manager window.
7. Type the name of the food/service item into the blank Name field, and then press **[Tab]**.
8. Fill out the Price, Comment, Prep Area, etc., information as desired.
Note: Click the **Quick Column Customizing** button , located at the left of the Name field, to access optional fields.
9. When finished, click the X at the top right-hand side of the window.

See <http://support.caterase.com/12/helpmenu/Setup/Menu Manager/Adding a New Menu.htm>.



All of your program’s default menus (for food and beverage items, rental equipment, and even miscellaneous charges such as setup fees, etc.), are managed in Menu Manager. Here you can enter new menus or edit existing ones.

Create an Ingredients List

1. Click the **Setup** sidebar.
2. Click the **Ingredients List** button.
3. Click the **Add List** button , located on the upper left-hand side of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new ingredients list, and press **[Enter]**.
6. Add a new ingredient by clicking the **Add Ingredient** button , located at the top of the Ingredients List window.
7. Type the ingredient name into the Description field, and press **[Tab]** to move to the next field.
8. Enter the Unit, Measure, Type, and Cost into their respective fields.
Note: Click the **Quick Column Customizing** button , located at the left of the Description field, to access optional fields.
9. When finished, click the X at the top right-hand side of the window.

See <http://support.caterase.com/12/helpmenu/Setup/Creating a Master Ingredients List.htm>.



In order to select ingredients for each of your menu items in your default menus, you must first create a master list of ingredients from which to choose.

Assign Ingredients

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. In the left-hand pane of Menu Manager, click the title of the menu you would like to add an ingredient to.
4. Click the **Ingredients** tab at the bottom of the screen.
5. Click the **Select New Ingredients** button , located on the right-hand side of the window.
6. Highlight and select ingredients.
7. Click in the Qty column and enter a quantity for each ingredient item.
Note: Click the **Quick Column Customizing** button , located at the left of the Description field, to access optional fields.



When a menu item is retrieved into an event, the corresponding ingredients are not only retrieved but also totaled up based on the quantity given to the menu item in the event.

See http://support.caterease.com/12/helpmenu/Setup/Menu_Manager/Adding_Ingredients_to_a_Menu_Item.htm

Create a Required Items List

1. Click the **Setup** sidebar.
2. Click the **Required Items** button.
3. Click the **Add List** button , located along the left-hand pane of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new required item list and press **[Enter]**.
6. Click the **Add Item** button , located at the top of the Required Items window.
7. Type an Item Description (Name) for the new item, and press **[Tab]**.
8. Select a Unit (of measurement) for the required item.
9. Optionally enter a Category, to be used for tracking the item, and a Comment.
10. When finished, click the X at the top right-hand side of the window.



If a menu item requires certain accessories (chafing dishes, utensils, napkins, plates, etc.), each time it is serviced, you can attach a custom list of those “required items” to that menu item.

See http://support.caterease.com/12/helpmenu/Setup/Creating_a_Master_List_of_Required_Items.htm

Assign Required Items

1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. In the left-hand pane of Menu Manager, click the title of the menu you would like to assign a required item to.
4. Click the **Required Items** tab at the bottom of the screen.
5. Click the **Select Items** button , at the right-hand side of the Required Items window.
6. Highlight and select the required items.
7. Enter a Default Qty for your required items.
8. Click the **Quick Column Customizing** button , to access additional columns, such as Linked, where you can optionally link the quantity of this item to the number of corresponding menu items ordered in an event.



Whenever you retrieve a menu item (that has “required items” associated with it) into an event, the corresponding list of required items will be retrieved and automatically totaled up based on the quantity of menu items you order.

See [http://support.caterease.com/12/helpmenu/Setup/Menu_Manager/Adding_Required_\(Packing_List\)_Items_to_a_Menu_Item.htm](http://support.caterease.com/12/helpmenu/Setup/Menu_Manager/Adding_Required_(Packing_List)_Items_to_a_Menu_Item.htm)

Add Vendors

1. Click the **Setup** sidebar.
2. Click the **Vendor List** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of the screen.
4. Type a name for your new site location, and press **[Enter]**.
5. Enter additional information into each field.
6. Optionally add a Picture, Description, Notes, and Directions.



Each menu item (or ingredient item) can have a specific vendor associated with it.

See http://support.caterease.com/12/helpmenu/Event_Manager/Printing_Menu_Item_Vendor_Lists.htm

Room/Venue Customization

Add a Master List of Setup Styles

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Setup Styles**.
3. Click the **Add New Setup Style** button , located at the top of the window.
4. Type a name for the new setup style.
5. Optionally add notes by typing into the **Notes** text block.
6. Optionally add a picture by right-clicking into the **Picture** text block and choosing **Insert Image**.



If you own the Banquet Rooms module in CaterEase, your program will warn you if you have any conflicts with your banquet space, including double-booking, guest capacity conflicts, and unrecognized setup styles.

See http://support.caterEase.com/12/helpmenu/Setup/Establishing_Banquet_Room_Capacities_and_Relationships.htm

Create Locations to Group Your Rooms (Optional)

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. Click the **Add Location** button , located at the top left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new location.
6. Optionally add notes by typing into the **Notes** text block.
7. Optionally add a picture by right-clicking into the **Picture** block and choosing **Insert Image**.

Add Banquet Rooms to Your Locations

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. In the left-hand pane of the window, select the location you want to add a new room to.
4. Click the **Add Room** button , located at the top left-hand side of the window.
5. Type a name for your new room.

Establish Setup Styles and Capacities for a Room

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. In the left-hand pane of the window click on the name of the room you would like to assign a setup style to.
4. Click the **Select Setup Style** button , located on the upper right-hand side of the window.
5. Double-click on the name of the setup style to select.
6. Type the room capacity into the Capacity field.

Staff/Position Customization

Add Employees

1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type the employee's last name into the Last field, and press **[Tab]** or **[Enter]**.
6. Fill out the remaining **General** tab fields by typing directly into the fields or selecting the desired quickpick item from the drop-down lists.
7. Click the **Address** tab and complete the Home Address and Mailing Address fields.
8. When finished, click the **Save** button , located in the **Home** ribbon tab.

See http://support.caterEase.com/12/helpmenu/Setup/Employee_Manager/Creating_a_Default_List_of_Employees.htm

Add Positions

1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Tools** button and select **Shifts Setup**.
4. Click the **Add Position** button , located at the top left-hand side of the window.
5. Type the name of the position into the Position field.
6. Optionally complete the Uniform and Agency fields.
7. Optionally enter an Estimated Cost (Wage) into the Est Cost field.
8. Click into the Price field and type a default price (per hour) for the shift.
9. Optionally click into the Flat checkbox to designate the shift as a flat rate.
Note: Flat rate is used as an alternative to hourly rate.
10. Optionally select the Default Shift Times by clicking the down arrow to the right of each field and selecting from the available options.
11. Optionally enter any desired notes into the Notes text block.
12. Click the **Close** button.
Note: You will be prompted to save your changes.

See http://support.caterease.com/12/helpmenu/Setup/Employee_Manager/Creating_Default_Shifts_or_Positions.htm

Global Settings Customization

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **Settings** and choose **Global Settings**.
3. Click a specific tab on the left-hand side of the window to edit settings related to that area of the program.
4. When finished, click **OK**.

See http://support.caterease.com/12/helpmenu/Setup/Editing_Global_Settings.htm
http://www.caterease.com/PDFs/training/GB_Advanced_Event_Manager_Tools.pdf (See Unit 2)

Miscellaneous Customization

Design Prints in Print Designer

<http://www.caterease.com/PDFs/training/QR/QuickReference-PrintsDesigner.pdf> (Quick Reference Guide)
http://www.caterease.com/PDFs/training/GB_Creating_Custom_Event_Prints.pdf (User Guide)

Create Custom Merge Documents in Marketing Tools

<http://www.caterease.com/PDFs/training/QR/QuickReference-MarketingTools.pdf> (Quick Reference Guide)
http://www.caterease.com/PDFs/training/GB_Creating_Custom_Merge_Documents.pdf (User Guide)

Import Accounts and/or Prospects

http://support.caterease.com/12/helpmenu/Account_Manager/Adding_an_Account_in_Account_Manager.htm
http://support.caterease.com/12/helpmenu/Account_Manager/Importing_Customers_into_Account_Manager.htm



To assign a position (shift) to an employee, follow these steps:

1. Click on the employee's name from the grid in Employee Manager.
2. Click the **Select Positions for Employee** button .
3. Highlight the position(s).
4. Click the **Select** button.



The Global Settings feature allows you to change certain settings in the program and affect all users on your Caterease network. Settings here include general regional and field settings, as well as a variety of other miscellaneous settings.