caterease™
catering & event management software

Training Guide

Advanced Event Manager Tools

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TABLE OF CONTENTS

Unit 1: Advanced Customization Features 4

Customizing Field Names 4
Available Settings 5
Adding or Removing General Fields from the Screen 7
Adding or Removing Client and Financials Details 8
Making Fields Generally Required 8
Making Fields Conditionally Required 10
Creating Dynamic, One-Click Email Templates 11
Retrieving a Saved Email Template 14

Unit 2: Advanced General Event Features 16

Creating an Event Default Checklist 18
Creating an Auto-Checklist for New Events 20
Adding an Auto-Checklist into an Event 22
Setting up Scheduled Items 23
Selecting Scheduled Items 25
Adding a Related File to an Event 28
Scheduling an Event Deposit 29
Making Payment on a Scheduled Deposit 30
Adding Scheduled Event Deposits 32
Creating a Conditional Deposit Schedule 33
Setting the Program to Update Deposits Due Automatically 34
Adding a New Markup Schedule 39
Assigning a Default Markup Schedule to an Account 40
Assigning a Default Markup Schedule to a Site Location 41
Displaying the Base Price Markup Field 41

Unit 3: Establishing Global Settings 43

Unit 4: Advanced Menu Features 54

Customizing the Food/Service Grid 54
Using the Expanded Grid Mode 55
Fields Available in the Food/Service Grid 56
Using Special Editing Options 57
Inserting Page Breaks 59
Establishing a Menu Item as Hidden 59
Allowing Item Hiding on a Print 60
Linking Quantity to Guest Count 61
Linking Sub-Event Guest Count to General Guest Counts 61
Batch Processing Menu Items 62

Unit 1: Advanced Customization Features

What you see in different areas of Caterease is largely up to you. You may customize your screen display by renaming fields, rearranging existing fields, removing fields, and creating your own user-defined fields.

Additionally, there are several default settings you can establish to assist you in your data entry. For example, you can designate certain fields as "required" in order to save/book an event. Or you can establish various Global Settings so that certain common details default automatically whenever you create a new event.

This guide, while it does not discuss every possible opportunity for you to customize your Caterease program, it does discuss the importance of establishing various global settings for how your program behaves. These settings are for use among you and your colleagues, and, when implemented, will drastically decrease your time spent performing data-entry tasks. Additionally, this guide covers how to modify settings on-the-fly, on an event-by-event basis, to afford you the utmost in flexibility.

Objectives:

Upon completing this unit, you will be able to:

- *Customize names of fields.*
- *Customize your screen display.*
- *Establish required fields.*
- *Create custom e-mail attachment lists.*
- *Create e-mail templates.*

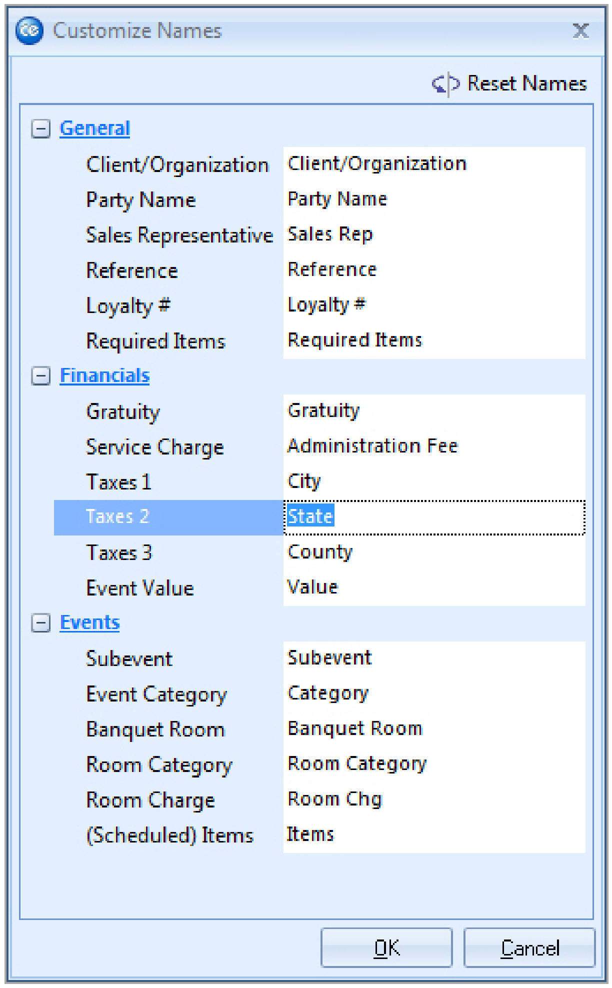
Renaming Fields

If you do not like the term "Sub-Event," or if you'd rather use the field "Category" to track some specific piece of information, either of these can be renamed through your program's Global Settings. Various fields throughout your program can be renamed using the steps below.

Customizing Field Names

__Tip:__ If prints in your Print Designer or Marketing Tools Package use the particular fields you have renamed here, you will likely need to open those prints and reselect those fields with their new names in order for them to merge information properly.

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **General** > **Customize Names**.
   Result: *The Customize Names window opens.*



3. Click into the General, Financials, or Events category fields and type a new name as desired.
4. When finished, click **OK**.
   Result: *A notification message appears.*
   Note: *Changes will take effect throughout the program anywhere these terms are found.*
   Note: *Click the* ***Reset Names*** *button at the top right-hand side of the window to restore all fields back to their defaults.*
5. Click **OK** on the notification message.
   Result: *The window closes and your changes are saved.*

Available Settings

Setting	Description
Client/Organization	This is a field on the General tab in Event Manager which identifies the name of the customer holding the currently selected event.
Party Name	This is a field on the General tab in Event Manager, and offers a customizable quickpick list. This field can be tracked using your program's query tools.
Sales Representative	This is a field on the General tab in Event Manager, and displays the name of the sales rep responsible for the event. You might opt to change the name to Event Planner or Booking Agent. The Sales Representative names are added in Security.
Reference	This is a field on the Miscellaneous tab of Event Manager; pertains to how the customer heard about your company, thereby allowing you to track your marketing strategies.
Loyalty #	This field lets you track revenue for parties based on a special number assigned to a customer. The loyalty #, established in Account Manager, defaults to the appropriate number for the client or contact person booking an event.
Required Items	This is a field that pertains to a list of items, such as utensils, chafers, carts, etc., you can designate as "required" for an event.
Gratuity	This field refers to funds (tips) that will go to the service staff who works the event.
Service Charge	This is a fee that is added by the venue or catering company to act as an operating cost for such things as insurance, advertising, etc. This field might be renamed "Booking Fee" or "Event Production Fee," and is separate from a gratuity.
Taxes 1	This field pertains to the first tax for the event. Note: Many companies will use only this field (and not Taxes 2 and Taxes 3, below).
Taxes 2	This field pertains to the second tax rate, if applicable. See note above.
Taxes 3	This field pertains to the third tax rate, if applicable. See note above.
Event Value	This field pertains to the value of the event. The user can create a user-defined event value and decide what data to include in the User-Defined Event Value.
Sub-Event	This is the name of the button on the Event Manager screen. It can be renamed to anything you want. (Examples might include "Event Details," "Breakout," "Meal," etc.
Event Category	This is a field on the General tab in your Event Manager, and offers a customizable quickpick list.
Banquet Room	This field refers to a large room, perhaps in a hotel, that can accommodate a banquet. This field might be renamed "Room," "Function Room," etc.
Room Category	This field refers to a room type, or category, of room (such as ballroom, meeting room, etc.).
Room Charge	This field refers to a charge associated with a particular room. This field might be renamed "Room Fee," "Room Rental," etc.
(Scheduled) Items	This field refers to items that can be tracked, such as tables, delivery vans, bowling lanes, etc.

Customizing the Event Manager Display

With Caterease, you are free to make up your own fields, remove fields, rearrange fields, and rename fields. You can completely redesign the screens to suit your needs! Although you are able to customize your screens in all Caterease Managers, this topic discusses customizing your screen display in Event Manager.

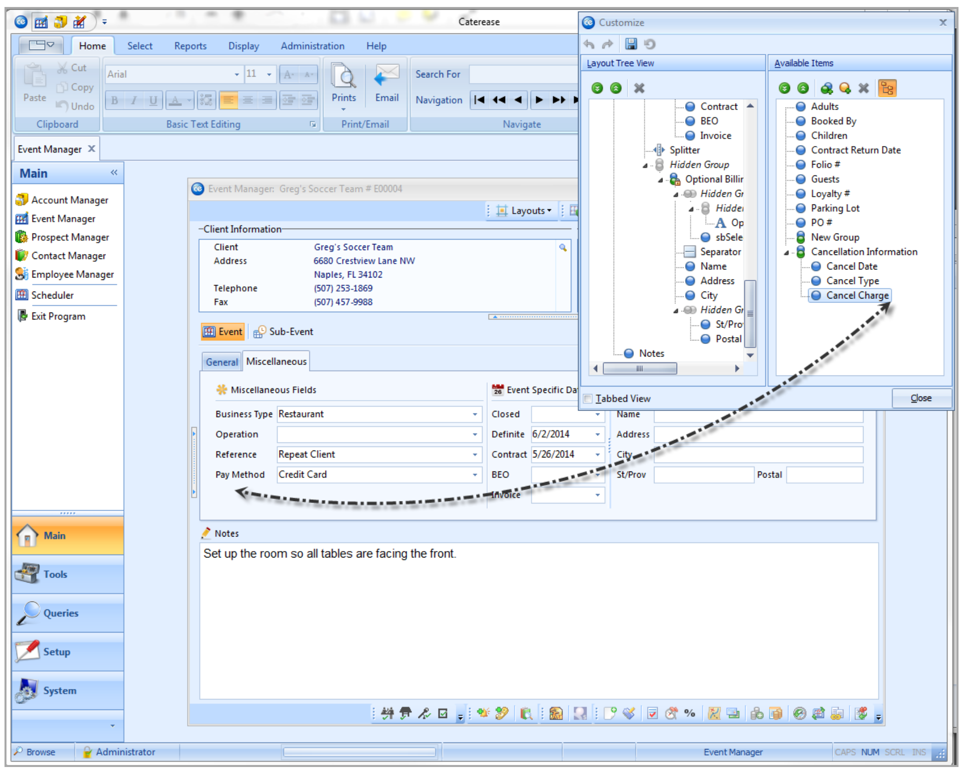
Adding or Removing General Fields from the Screen

1. Access Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar.

2. Click your right mouse button over the field name on either the **General** or **Miscellaneous** tab.
   Note: *Do not right-click on the fields themselves; rather, right-click on the name of the field.*

3. Select **Customize**.
   Result: *A pop-up window opens.*

4. Hold your left mouse button down on any field name and drag and drop it into the Available Items pane (right-hand side of the screen).
   Note: *To add a field to your screen, hold your left mouse button down on any field name in the Available Items pane and drag and drop it onto your screen.*



5. Close the Customization window.

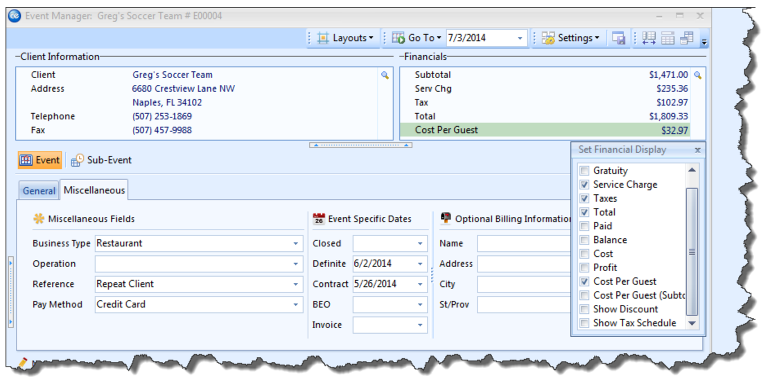
6. Click the **Save Window Settings** button , located at the top of your screen, if you want to save this arrangement as your personal configuration.

Adding or Removing Client and Financials Details

1. Float your mouse pointer over the **Client/Organization Information** area (top left) or the **Financials** area (top right) at the top of the Event Manager screen.

2. Click your right mouse button and select **Customize**.
   Result: *A pop-up Customization window opens, listing optional fields to be displayed in this area of the screen.*

3. Click into any desired field to add a check mark or remove a check mark from a particular field.
   Result: *Fields with check marks next to them will appear on the Event Manager screen.*



4. Close the Customization window.

5. **[Optional]** Click the **Save Current Window Settings** button , located at the top of your screen, if you want this new arrangement to be the default look for your Event Manager screen.

Making Fields Required

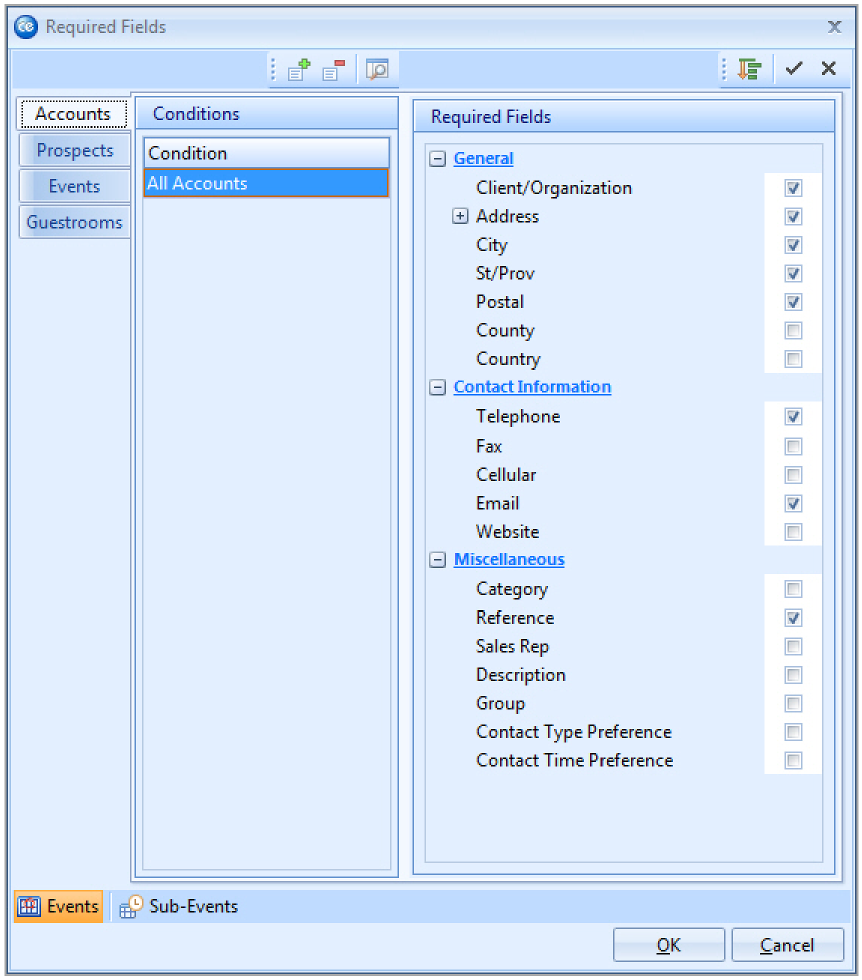
Using the steps below, you can make certain fields of information required or even conditionally required - meaning certain details are required for one type of event or customer but might not be required for others. (For example, perhaps a "corporate" customer is required to have a fax number and email address, while a "social" customer requires a cell phone number.)

Making Fields Generally Required

Tip: Even user defined fields you have created can be designated as required fields using this tool, and will be listed along with the other fields on the appropriate tabs. Also, note that you can optionally select all fields on the currently displayed tab as required information by clicking the ***Check All Fields*** *button at the top right of the window.*

1. Click the **Administration** ribbon tab at the top of the screen.

2. Click **General** > **Required Fields**.
Result: *The Required Fields window opens.*



3. On the left-hand side of the window, click the tab representing the area of the program where you want to create required fields.
Note: *You can make fields required for your accounts (or "customers"), your prospective leads, your events (including sub-event or "meal" details) or your group rooms contracts.*

4. **[Optional]** If you have already created conditions for your required fields (see topic below), click the condition in labeled "All Accounts" (or "All Events," "All Prospects," etc.), in the left pane of the window.

5. In the right-hand pane of the window, click the checkbox next to any field you want to be required information - optionally clicking the small plus sign next to any unopened group of fields to choose fields from that group.
Result: *The selected fields will now be required information - meaning that*

no accounts, events, etc. will be able to be saved without those details entered. (Existing accounts, events, etc. that are missing required information can be opened, but cannot be edited and saved until all required information has been entered.)

> ***Important Note:*** *If designating required fields for events, you can click the* ***Sub-Events*** *button at the bottom left of the window to make specific sub-event details required.*

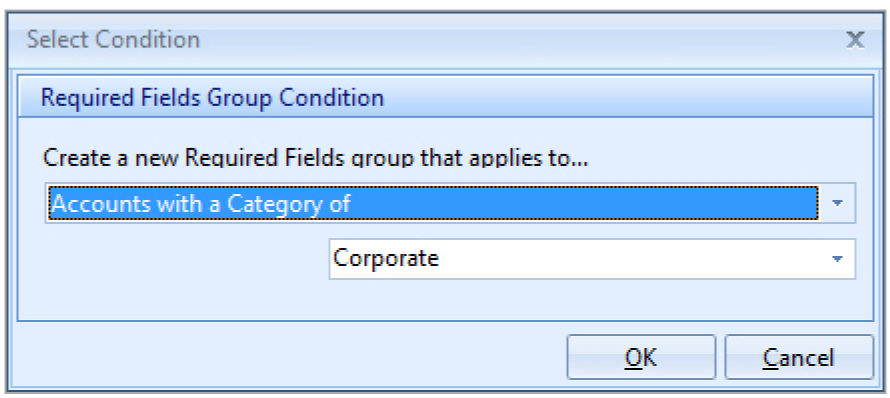
6. Click **OK** to close the window and save your changes.

Making Fields Conditionally Required

> ***Tip:*** *The program evaluates these conditions in the order they are listed - and stops when it reaches a condition that is true. For example, if your first condition for accounts says "Category = Corporate" and your second condition says "Description = Association Member", when the program finds an account with a category of "Corporate" it will apply those required fields and stop - never evaluating for the second condition. For this reason, it is imperative that any condition that says "All" records ("Accounts," "Events," etc.), must be the LAST condition listed.*

1. On the left-hand side of the Required Fields window, click the tab representing the area of the program where you want to create conditional required fields.
   Note: *You can make fields required for your accounts (or "customers"), your prospective leads, your events (including sub-event or "meal" details) or your group rooms contracts.*

2. Click the **Add Condition** button at the top center of the window.
   Result: *The Select Condition window opens.*



3. Click down arrow to the right of the first field in the window to select a condition.
   Note: *Conditions vary depending on the tab selected in Step 1, above.*

4. Click the down arrow to the right of the second field in the window and choose an option from the corresponding quickpick list.
   Note: *These lists can be customized by you.*

5. In the right pane of the window, click the checkbox next to any field you want to be required information for records that match your condition - optionally clicking the small "plus" sign next to any unopened group of fields to

choose fields from that group.
Result: *The selected fields will only be required for records that match your condition (see tip below for important information about prioritizing conditions).*
Note: *When using Event Wizard to book an event, you can create custom Wizard layouts with the same names as your event "Categories" or "Business Types," and when you use one of those Wizards to book a new event, the appropriate fields will be required.*

> **Important**: Hold your left mouse button down on the new condition you've created in the left pane of the window and drag it up (or down) in the list to prioritize.
> *See tip for important information.*

6. When finished, click **OK** to close the window and save your changes.

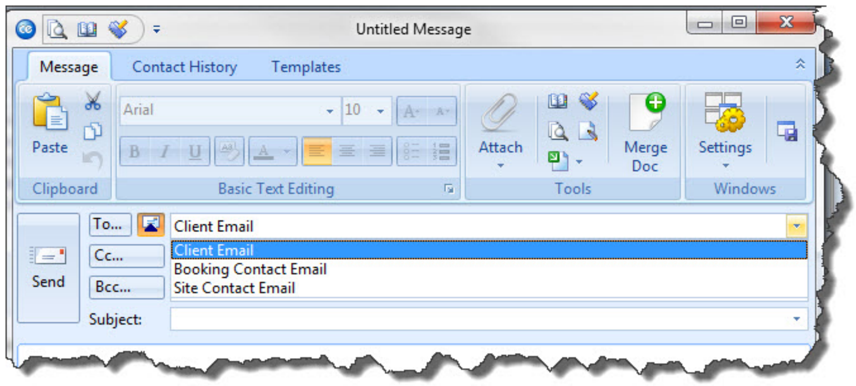
Creating E-mail Templates

If you have the Professional version of Caterease, you can create an e-mail template, complete with custom attachments.

Creating Dynamic, One-Click Email Templates

1. Click the **Email** button at the top of your Caterease screen.
   Result: *The Email window opens.*
2. Click the **Templates** tab from the top of the Email window.
3. Click the **Design Mode** button to create a new template.
4. Click the **Relative Email Address** button  and click the down arrow to the right of the field to choose the appropriate relative address.
   Note: *If not using the relative address option, you may click the **To** button and choose an e-mail recipient from your address book.*

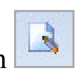
Result: *The Select Email Address window opens.*



5. Click the down arrow located at the right of the Subject field and select a subject from the corresponding quickpick list.
   Note: *You may, of course, simply type a subject directly into the field.*

6. Click the **Message** tab at the top of the window.

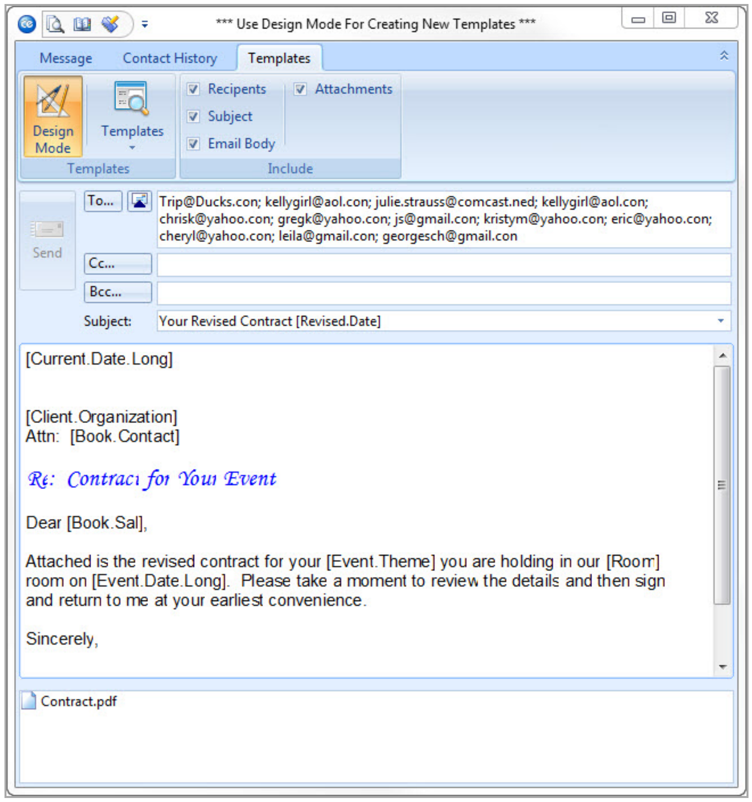
7. Type the body of your e-mail into the large text block.
   Note: *If you own the Marketing Tools add-in, click the **Merge Doc** button and select a document from your custom library.*

8. **[Optional]** Click the **Use Signature** button  if you would like to include your signature in the e-mail along with the merge document.

9. Click the **Attach** button at the top of the e-mail window and choose your attachment type.
   Note: *If you select **File** as your attachment type, you will be taken to a standard Windows browse window, where you can select a file to attach to the e-mail.*

10. Continue adding attachments until you have added all desired attachments to your e-mail template.
    Note: *Attachments appear in the small pane at the bottom of the Email window.*

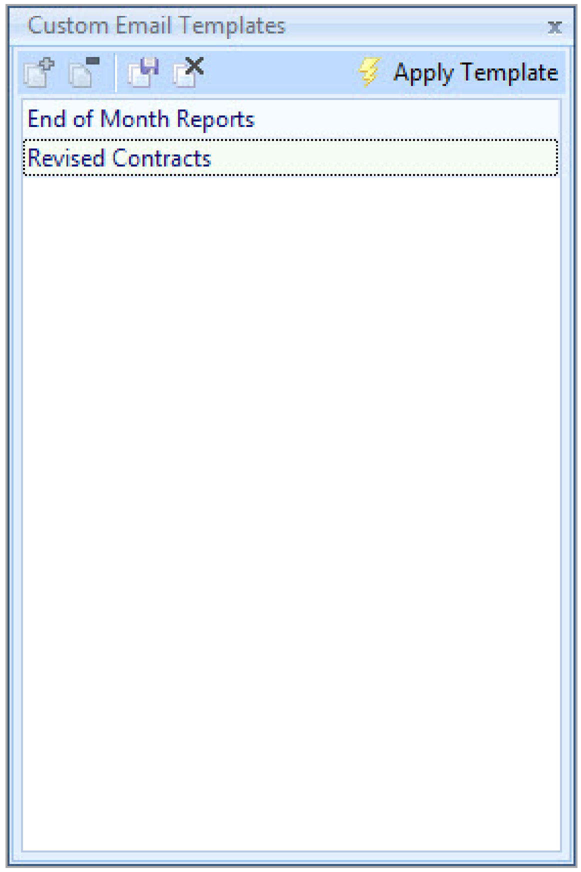
11. Click the **Templates** button again and choose **Custom**.



12. Click the **Add Template** button  to create a new template.
Result: A line titled "New Template" appears.

13. Type the name of your new template name directly over the words "New Template."

14. Click the **Save Current Template** button  to save your new template.



15. Click the X at the upper right-hand side of the window to close the window.

16. Click the **Design Mode** button again in order to exit Design Mode.

17. Click **Send** from the Email window.
    Result: *The e-mails are sent through your Outlook (or other provider) program, and any attachments are exported. Although the e-mails are sent as a batch, all merge fields will populate with the specific details for each recipient.*

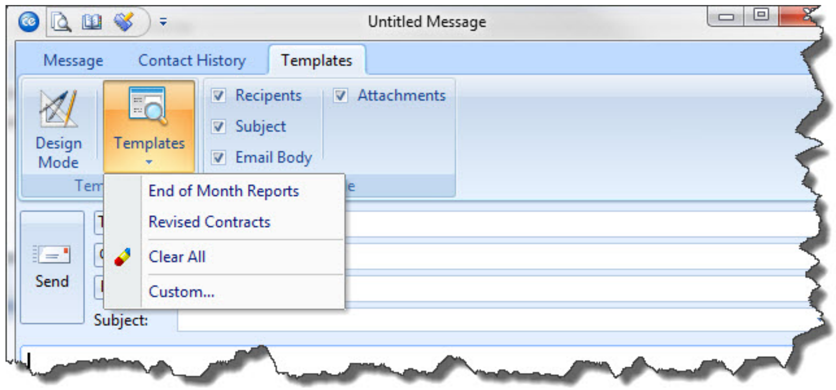
Retrieving a Saved Email Template

1. To retrieve a saved e-mail template, click the **Templates** tab from the top of the Email window.

2. Click the **Templates** button.
   Result: *A drop-down list of previously created templates displays.*

3. Select your desired template from the drop-down list.

4. Click into the checkboxes to remove any previously selected options from your e-mail. Choose from among Recipients, Subject, Email Body, and Attachments.
   Note: *By default, all options are selected (checked).*



5. Click **Send**.
   Result: *The e-mails are sent through your Outlook (or other provider) program, and any attachments are exported. Although the e-mails are sent as a batch, all merge fields will populate with the specific details for each recipient.*

Unit 2: Advanced General Event Features

A variety of time-saving features are available in Caterease, just a few of which are discussed here. Handy Caterease features, such as default event timelines and checklists, will enable you to streamline the process of booking a party. Caterease also allows you to manage your legacy documents, brochures, contract, etc., via the "related files" feature, available in Event Manager, Account Manager, and Employee Manager.

Objectives:

Upon completing this unit, you will be able to:

- *Add an event timeline and create a default timeline.*
- *Establish a list of Scheduled Items.*
- *Create an Event Checklist.*
- *Add and manage Event-Related Files*
- *Create Default Deposit Schedules.*
- *Make Payment on a Scheduled Deposit.*
- *Manage Event Costing.*
- *Establish Default Base Price Markup Rates.*

Creating a Detailed Event Timeline

In addition to the various time fields available in Event Manager - several of which can be renamed - you can also create a detailed timeline unique to each party. For example, elaborate events such as wedding receptions may require a longer list of times - including times for such things as "Best Man's Toast," "Father/Daughter Dance," "Cake Cutting," and more. You can either create these times on-the-fly within an event, or select them from default lists. *This feature is available in Standard and Professional Versions.*

Creating an Event Default Timeline

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Lists** button and choose **Default Timeline Items**.
   Result: *The Default Timeline Items window opens.*
3. Click the **Add New Timeline** button , located on the left-hand side of the window.
   Note: *This button is identical to the* ***Add New Timeline Item*** *button on the right-hand side of the screen, so do not confuse the two.*
   Result: *A confirmation prompt displays.*

4. Click **Yes** to confirm your choice.
   Result: *A new field is added.*

5. In the newly created field, type over the name "New List" to rename your new default timeline.
   Note: *Alternatively, you may right-click on the field and select* ***Rename Timeline List****.*

6. Press **[Enter]** to save your new default timeline.

7. **[Optional]** Use the Timeline Panel to modify your checklist.

   - **Delete Timeline:** This button deletes the currently highlighted checklist and all of its items.
     Note: *This function cannot be undone; you will be prompted to confirm your choice.*

   - **Move Up:** This button moves the highlighted timeline up one position in the list.

   - **Move Down:** This button moves the highlighted timeline down one position in the list.

8. To add a new item to your default timeline, click the **Add New Timeline Item** button, located at the top right-hand side of the Default Timeline Items window.
   Result: *A new, blank field is added.*

9. Type a timeline item into the Item field and press **[Tab]** or **[Enter]** to move to the next field.

10. Select a Category from the drop-down quickpick list to the right of the field and press **[Tab]** or **[Enter]**.

11. In the Time field, type the time the timeline item is due or use the up-and-down arrows to select a time.

12. Repeat Steps 8-11 until you have finished creating your default timeline.

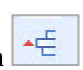
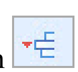
13. **[Optional]** Click the **Notes** text block and enter any desired notes pertaining to the default timeline.
    Note: *These notes are retrieved into an event along with the timeline. Format the notes by highlighting the text, right-clicking, and selecting* ***Font****.*

14. Click **OK** to save your work and close the window.

Creating an Event Checklist of To-Do Items

You can create a checklist of "to-do" items for your various events, either selecting from default lists of tasks or adding a custom task on-the-fly. In addition, you can assign default due dates to these checklist items - telling the program to calculate a certain number of days after the date an event is booked or held, or even having that number conditionally change based on such details as event "theme," "category," "status," etc.

Creating an Event Default Checklist

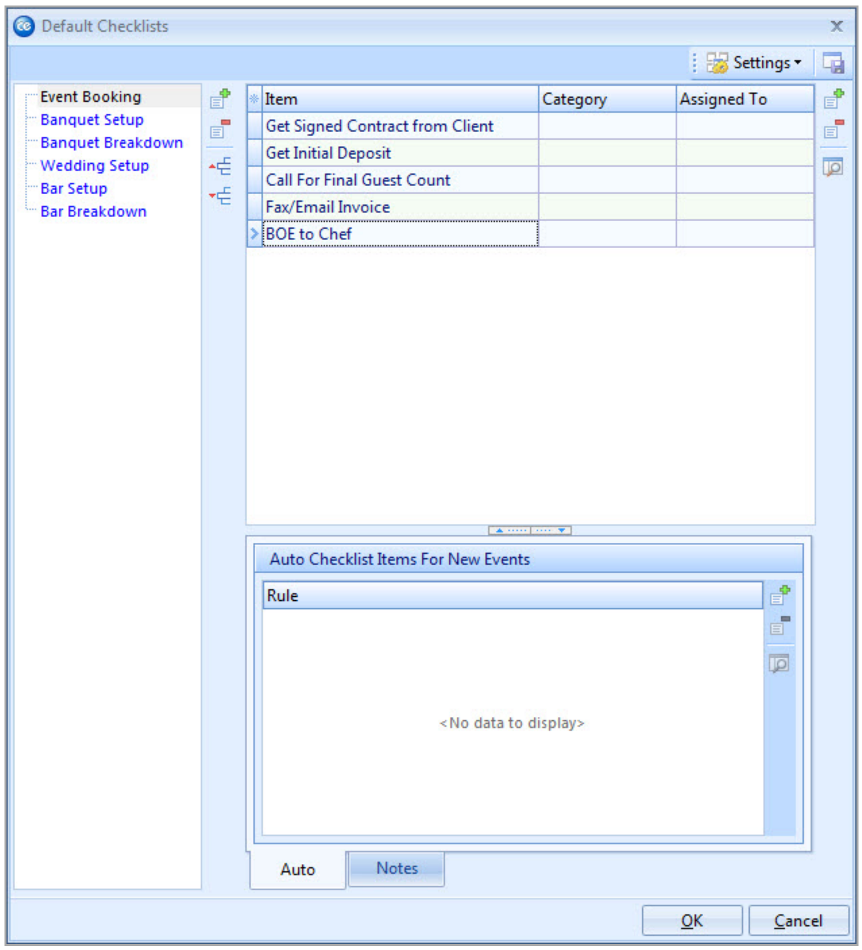
1. Click the **Administration** ribbon tab at the top of the screen.
2. Click the **Lists** button and choose **Default Checklists**.
   Result: *The Default Checklists window opens.*
3. Click the **Add New Checklist** button , located on the left-hand side of the window.
   Note: *This button is identical to the **Add New Checklist Item** button on the right-hand side of the window, so do not confuse the two.*
   Result: *A confirmation prompt appears.*
4. Click **Yes** to confirm your choice.
   Result: *A new field is added.*
5. In the newly created field, type over the name "New Checklist" to rename your new default checklist.
   Note: *Alternatively, you may right-click on the field and select **Rename Checklist**.*
6. Press **[Enter]** to save your new default checklist.
7. **[Optional]** Use the Checklist Panel to modify your checklist.
   - **Delete Checklist:** This button  deletes the currently highlighted checklist and all of its items.
     Note: *This function cannot be undone; you will be prompted to confirm your choice.*
   - **Move Up:** This button  moves the highlighted checklist up one position in the list.
   - **Move Down:** This button  moves the highlighted checklist down one position in the list.

8. To add a new item to your default checklist, click the **Add New Checklist Item** button , located at the top right-hand side of the Default Checklists window.
   Result: *A blank field is added.*

9. Type a checklist item into the Item field and press **[Tab]** or **[Enter]** to move to the next field.

10. Select a Category from the drop-down quickpick list to the right of the field and press **[Tab]** or **[Enter]**.

11. Click the down arrow to the right of the Assigned To field to select, from the quickpick list, the person responsible for the checklist item.



12. Repeat Steps 8-11 until you have finished creating your default checklist.

13. **[Optional]** Click the **Notes** tab and enter any desired notes pertaining to the default checklist.
__Note:__ These notes are retrieved into an event along with the checklist. Format the notes by highlighting the text, right-clicking, and selecting __Font__.

14. Click **OK** to save your work and close the window.

Creating an Auto-Checklist for New Events

1. Click the **Administration** ribbon tab at the top of the screen.

2. Click the **Lists** button and choose **Default Checklists**.
__Result:__ The Default Checklists window opens.

3. Click the **Add New Checklist** button , located on the left-hand side of the screen.
__Note:__ This button is identical to the __Add New Checklist Item__ button on the right-hand side of the screen, so do not confuse the two.
__Result:__ A confirmation prompt appears.

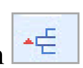
4. Click **Yes** to confirm your choice.
__Result:__ A new, empty checklist field is added.

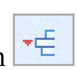
5. Type the name of the new checklist into the highlighted field.

6. Press **[Enter]** to save your checklist.

7. **[Optional]** Use the Checklist Panel to modify your checklist.

   - **Delete Checklist:** This button  deletes the currently highlighted checklist and all of its items.
   __Note:__ This function cannot be undone; you will be prompted to confirm your choice.

   - **Move Up:** This button  moves the highlighted checklist up one position in the list.

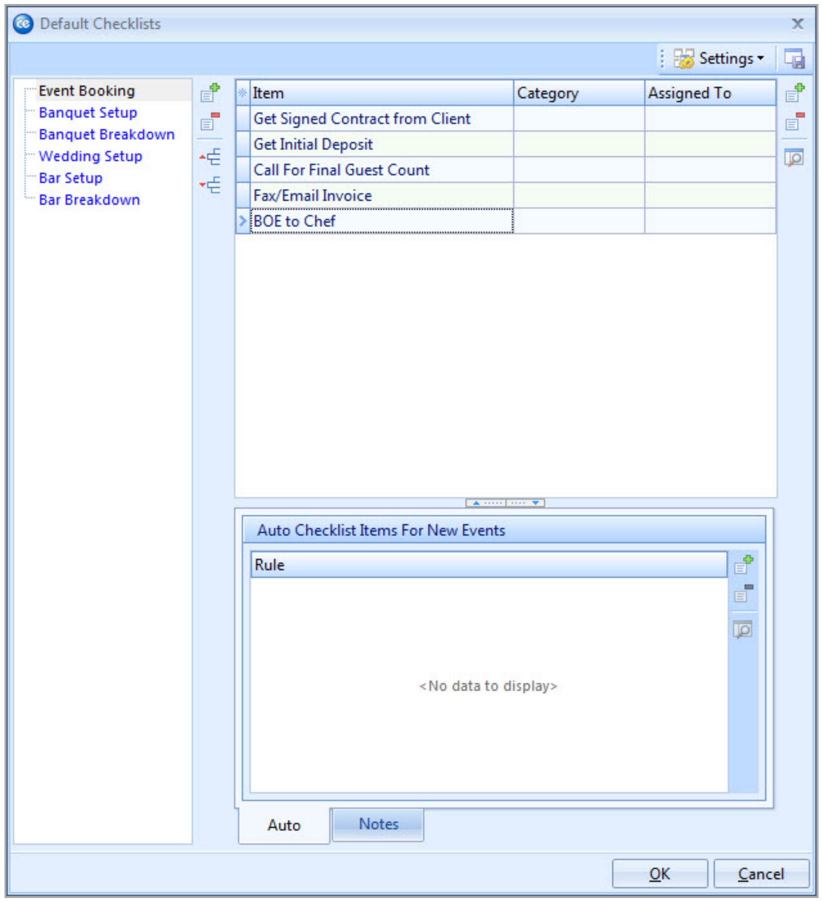
   - **Move Down:** This button  moves the highlighted checklist down one position in the list.

8. To add a new item to your default checklist, click the **Add New Checklist Item** button, located at the top right-hand side of the Default Checklists window.

9. Type a checklist item into the <u>Item</u> field and press **[Tab]** or **[Enter]** to move to the next field.

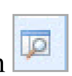
10. Select a Category from the drop-down quickpick list to the right of the field and press **[Tab]** or **[Enter]**.

11. Type the name of the person who is responsible for the checklist item into the Assigned To field, or select from the corresponding drop-down quickpick list.



12. **[Optional]** Access the Default Checklist Items Panel on the right-hand side of the screen to modify your checklist.

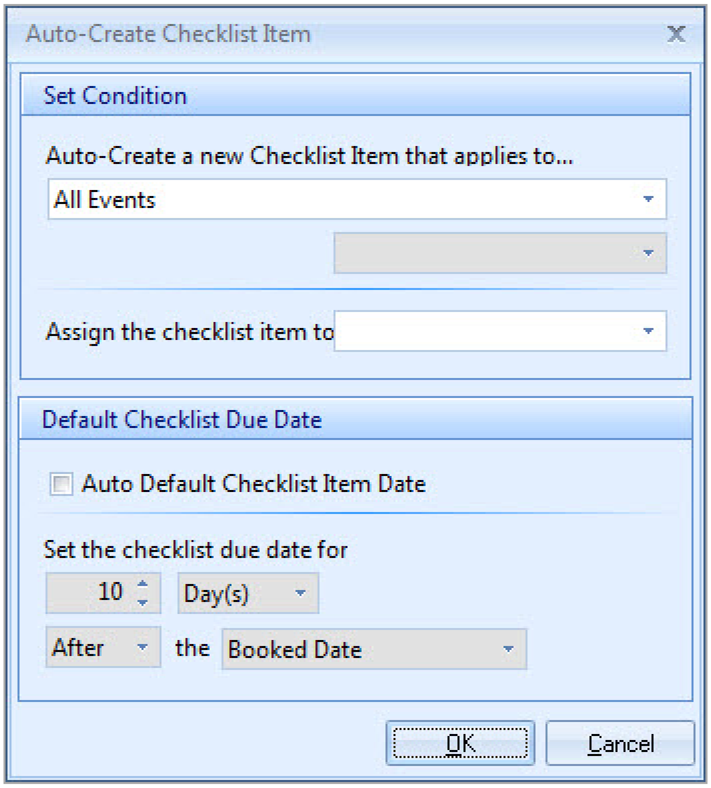
- **Delete Current Checklist Item:** This button  deletes the currently highlighted checklist item.
  Note: *You are prompted to confirm.*

- **View Checklist Item** This button  allows you to set or view both the checklist items and their due dates.

13. Click the **Add Automatic Item** button , located on the right-hand side of the **Auto** tab.
Result: *The Auto-Create Checklist Item window opens.*

14. Click the down arrow below the **Auto-Create a new Checklist Item that applies to...**heading to create a condition for all events or for specific events based on Status, Category, Theme, etc.

15. Click **OK** to save your changes and close the Auto-Create Checklist Item window.



16. **[Optional]** Click the **Notes** tab and enter any desired notes pertaining to the auto-checklist.
Note: These notes are retrieved into an event along with the checklist item.

17. When finished, click **OK** at the Default Checklists window.

Adding an Auto-Checklist into an Event

Tip: You can determine what columns are displayed on the Event Checklist grid by clicking the ***Quick Column Customizing*** *button at the far left of the column headings. Delete a checklist item by selecting it and clicking the* ***Delete Current Checklist Item*** *button.*

1. Retrieve the event for which you want to establish an auto-checklist.

2. Click the **Event Checklist** button , located at the bottom of Event Manager.
Result: *The Event Checklist window opens.*

3. Click the **Auto Create Event Checklist Item** button , located on the right-hand side of the Event Checklist window.
Result: *A confirmation window opens.*

4. Click **Yes** to confirm your choice.
   Result: *An informational prompt appears.*

5. Click **OK** at the information prompt.
   Result: *The previously created default checklist displays in the window.*

6. **[Optional]** Click the **Quick Column Customizing** button to add or remove headings from the checklist.

7. Click in the Due date field for a particular item and type the date the task should be performed by (or click the down arrow to use the drop-down calendar).
   Note: *The Due date may default based on settings established in your default checklists.*

8. **[Optional]** Click in the Assigned To field and type the name of the person responsible for this item, or click the down arrow to choose a name from the corresponding list.
   Note: *This name may have defaulted from your default checklist.*

9. **[Optional]** When an item has been completed, click the corresponding checkbox to the left of the **Done On** column.
   Result: *The current date is automatically entered in the* ***Done On*** *column, and the checklist item is designated as having been completed.*

   Note: *As an option, click the* ***Show Done/Not Done Tree*** *button to group items in this grid by their completion status.*

Setting up Scheduled Items

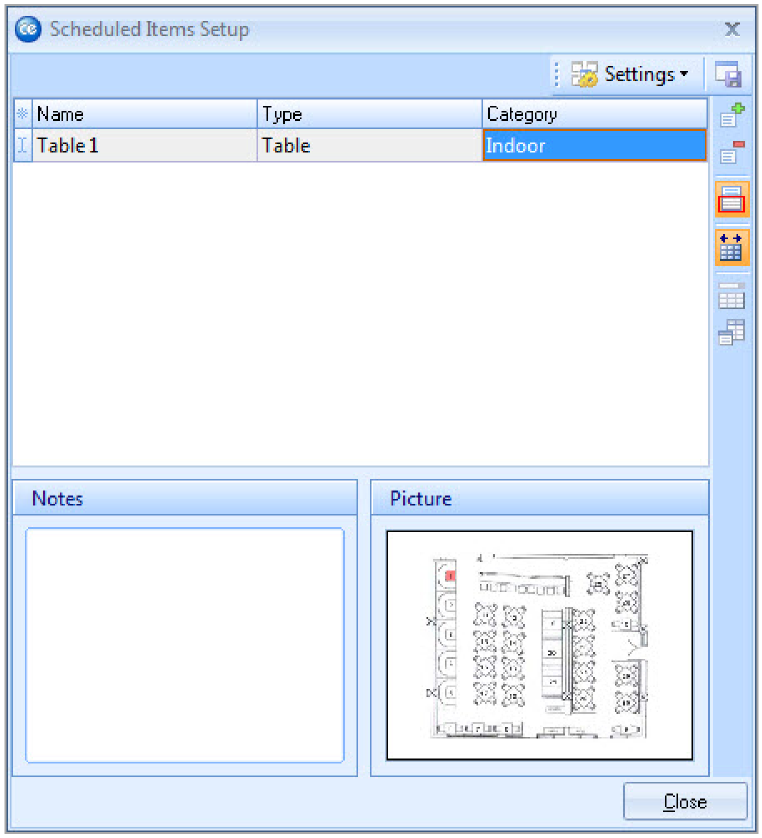
With the Scheduled Items feature in Caterease (Professional version), you are able to schedule certain items during an event (tables, delivery vans, bowling lanes, etc.). You can even have Caterease inform you of any scheduling conflicts if you double-book the items. The name of the "Scheduled Items" field is customizable, and can be changed to Scheduled Tables, Scheduled Vans, Scheduled Lanes, etc., through the **Administration** > **General** > **Customize Names** option.

Setting up Scheduled Items

1. Click the **Administration** ribbon tab, located at the top of the screen.

2. Click **Lists** and choose **Scheduled Items**.
   Result: *The Scheduled Items Setup window opens.*

3. Click the **Add Record** button, located on the upper right-hand side of the screen.
   Result: *A new line is added to the bottom of the list.*



4. Type the Name of the new scheduled item into the highlighted field, and then press **[Enter]**.

5. Enter the type into the Type field or select an option from the custom quick-pick list by clicking the down arrow located at the right of the field.

6. Enter the category into the Category field or select an option from the custom quickpick list by clicking the down arrow located at right of the field.
   Note: *To add additional columns to the grid, click the* ***Quick Column Customizing*** *button, located to the left of the* ***Name*** *column.*

7. **[Optional]** Type any desired notes about the item into the **Notes** text block.

8. **[Optional]** Add a picture of the item by right-clicking into the **Picture** block and selecting **Load From File**.

9. **[Optional]** Use the panel along the right-hand side of the window to modify your list of scheduled items.

   - **Show Notes/Pictures**: This button displays two panels at the bottom of the window to store notes and a picture for the currently highlighted scheduled item.

- **Auto Width:** This button arranges the detail grid so the columns you have selected to view fit precisely in the grid, eliminating the need for you to scroll to the right to see more details.

- **Group by Box:** This button displays a small panel along the top of the rid, allowing you to drag and drop a column heading and thus group your scheduled items by that particular column.
  Note: *As an alternative, try right-clicking a column heading and selecting* ***Group by This Field****.*

- **Field Chooser:** This button displays a small window from which you can drag additional fields to be displayed in your detail grid. You can also drag columns that are currently displayed into this window, thereby removing them from your detail grid.
  Note: *As an alternative, try right-clicking a column heading and selecting* ***Remove This Column****, or use the* ***Quick-Column Customizing*** *tool to add or remove fields.*

- **Delete Record:** This button deletes the currently selected scheduled item.

10. Repeat steps 3-8 as necessary to add additional scheduled items.
11. When finished, click **Close**.
    Result: *A confirmation prompt appears.*
12. Click **Yes**.

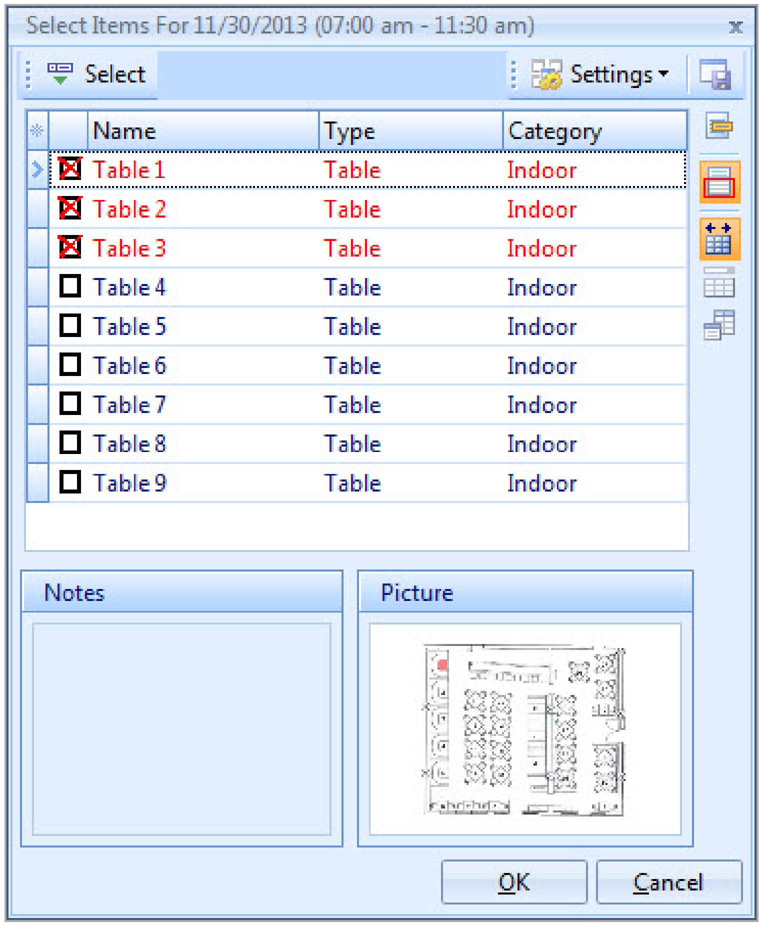
Selecting Scheduled Items (Vans, Tables, etc.)

With the Scheduled Items feature in Caterease, you are able to schedule certain items during an event (tables, delivery vans, bowling lanes, etc.), so you do not have to repetitively type your information. You can even have Caterease inform you of any scheduling conflicts if you double-book the items.

Selecting Scheduled Items

1. Click a sub-event in your Event Manager's Sub-Event display to select it.
2. Click the **Scheduled Items** button , located at the lower right-hand side of the **Sub-Event** pane.
   Result: *The Scheduled Items window opens.*

3. Click the **Select** button , located at the upper right-hand side of the Scheduled Items window.
   Result: *The Select Items window opens.*



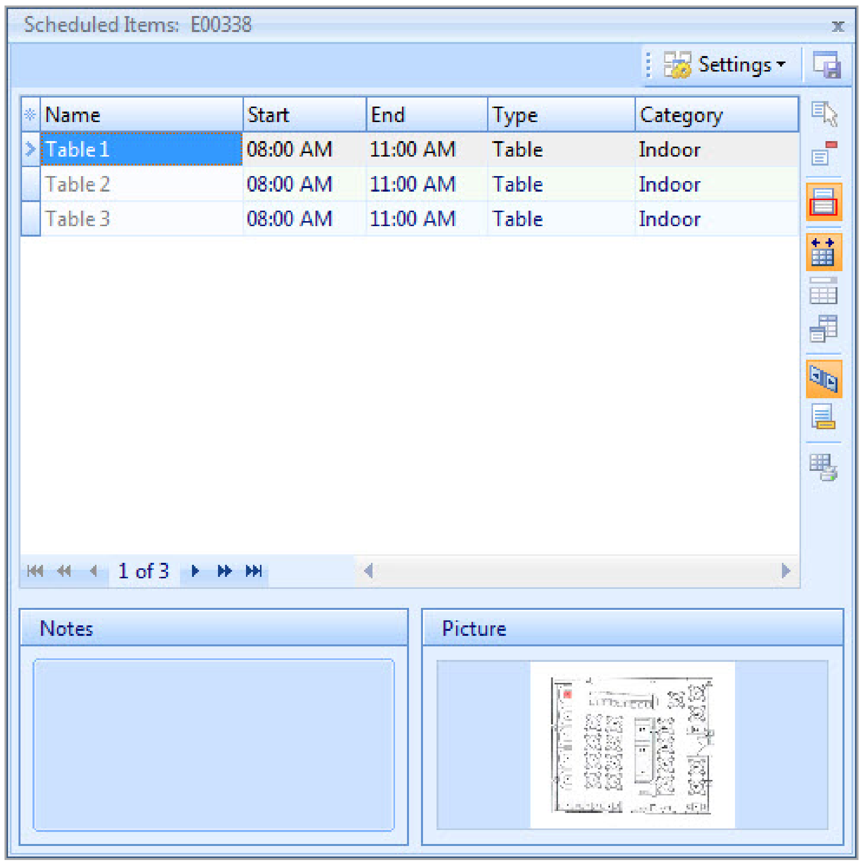
4. Select an item or items you want to retrieve in one of the following ways:

   - Single-click an individual item to select it.
   - Hold your left mouse button down on an individual item and drag it up or down to highlight multiple items. When finished, release the mouse button.
   - Click a single item, then hold your **[Ctrl]** key as you click other items in the window.
   - Click a single item, then hold your **[Shift]** key down and click another item to select both items all with all items between them.

5. With the items selected, retrieve the item into the sub-event in one of the following ways:

- Double-click a single item to select it.
- Drag and drop multiple selected items into the white space on the Scheduled Items window.
- Click the **Select** button to insert all highlighted items while leaving the Select Items window open.

6. When finished selecting your items, click **OK**.
Result: *Your items will display on the Scheduled Items window. Start time, End time, and Type auto-populate.*



7. **[Optional]** Click into the Category field and select a category from the drop-down quickpick list.

8. **[Optional]** 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 select from a list of additional options.

9. **[Optional]** Click the **Show Notes/Pictures** button to display notes and a picture of the scheduled item.

10. **[Optional]** Click the **Save Window Settings** button, located at the top of the window, if you want this arrangement to be the new default look.

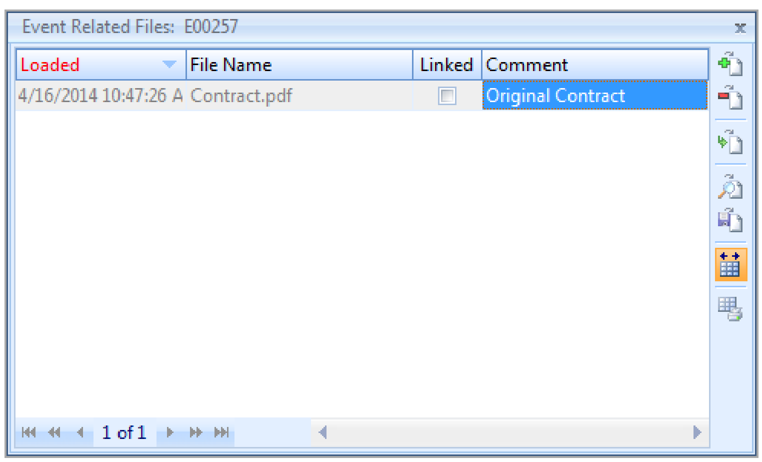
Relating Files to an Event

If you have any computer files — Word docs, Excel spreadsheets, PDF files, 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. You can even attach PDF copies of Caterease prints (Contracts, Invoices, letters, etc.), with a single mouse click, in the print preview window.

Adding a Related File to an Event

***Tip:** Open a file from this Event Related Files window by double-clicking its name, or by selecting it and clicking the **Open File** button.*

1. Click the **Event Related Files** button, located at the bottom right of the Event Manager window.
   Result: *The Event Related Files window opens.*



2. Click the **Add File** button, located on the right-hand side of the Event Related Files window.
   Result: *A confirmation message appears.*

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 this event; establishing a link to a file will connect this*

event to a file on your computer or network that you may change 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**.
   Result: *A browse window opens.*

5. Browse your way to the file you want to attach to this event and select it.
   Note: *You may want to click the down arrow next to the file type field a the bottom right of the browse window and select a different type of file.*

6. Click **Open**.
   Result: *The selected file is attached to this event, and is listed in the Event Related Files window.*
   Note: *As an alternative, you could double-click the file name in Step 5, above.*

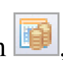
7. **[Optional]** Enter a **Comment** to describe the file or its relationship to the event.

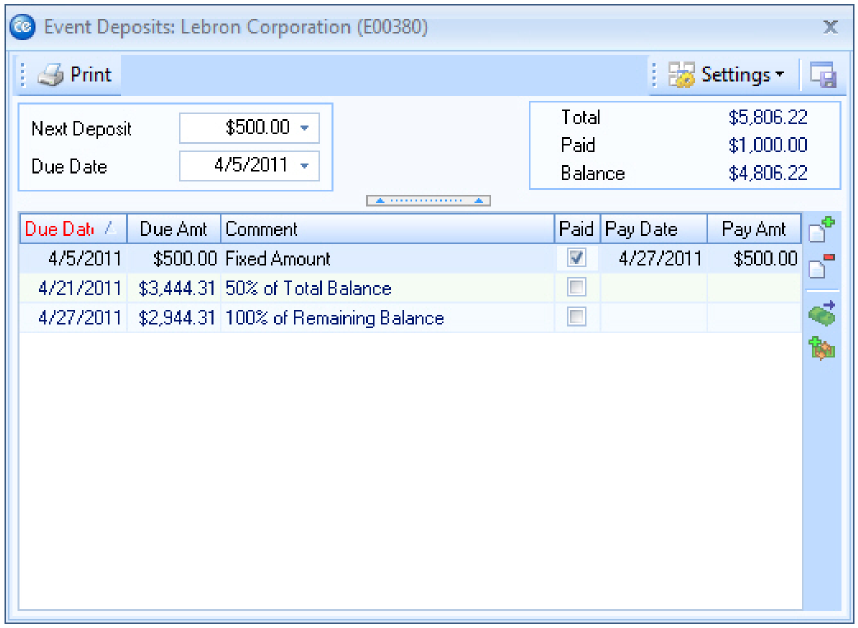
Scheduling Future Event Deposits

In Caterease, there is a distinction between payments made for an event and deposits that are due in the future. Future deposits are discussed below, including the option to create a regular schedule of deposits automatically calculated based on the date a party is booked or held.

Scheduling an Event Deposit

1. In the Event Manager, retrieve the event for which you want to schedule a deposit.

2. Click on the **Event Deposits Due** button , located at the bottom right of the Manager display.
   Result: *The Event Deposits window opens.*



3. Click the **Add Deposit** button , located at the right side of the Event Deposits form.
   Result: *A new, blank line is added to your deposits list.*

4. 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.*

5. Press your **[Enter]** key.
   Result: *Your cursor moves to the next field - the Amount field.*

6. Enter an amount for the deposit, or click the down arrow to get help from the drop-down calculator.

7. Press **[Enter]** and enter a Comment, if desired.
   Note: *Examples of comments might include "Initial Deposit," "Final Payment," etc.*

8. Repeat Steps 3-6 to add other deposits as desired.

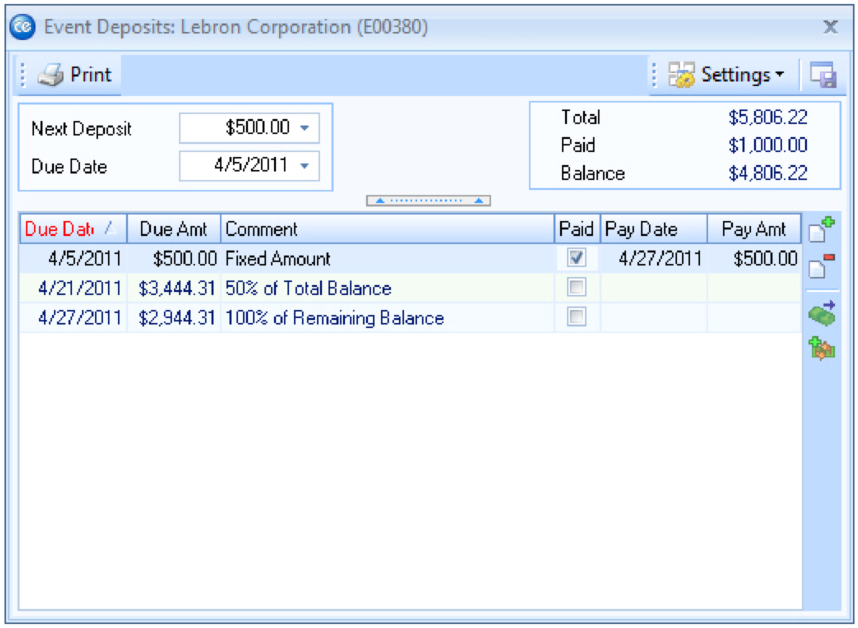
9. Click the **X** at the top right of the window when finished.
   Result: *A confirmation message appears.*

10. Click **Yes** to close the window and save your changes.

Making Payment on a Scheduled Deposit

1. Click on the **Event Deposits Due** button

, located at the bottom right of the Manager display.
Result: *The Event Deposits window opens.*



2. Select a deposit on the Event Deposits window.

3. Click the checkbox in the Paid column.
Result: *The current date is automatically entered in the Paid Date column, and the due amount is entered as the Paid Amount.*
Note: *These defaults can be overridden if necessary.*

4. Click **Add To Payments** button  to automatically add a payment to this event reflecting this deposit.
Result: *A confirmation message appears.*
Note: *Since Caterease treats deposits due different from payments made, it is highly recommended that you add any paid deposits to your event payments by following this and the next two steps.*

5. Click **Yes**.
Result: *A Payment Details window opens.*
Note: *The payment date and amount will default from your Event Deposits information, while the payment method will default from the general event information (if you have entered a payment method and/or credit card information).*

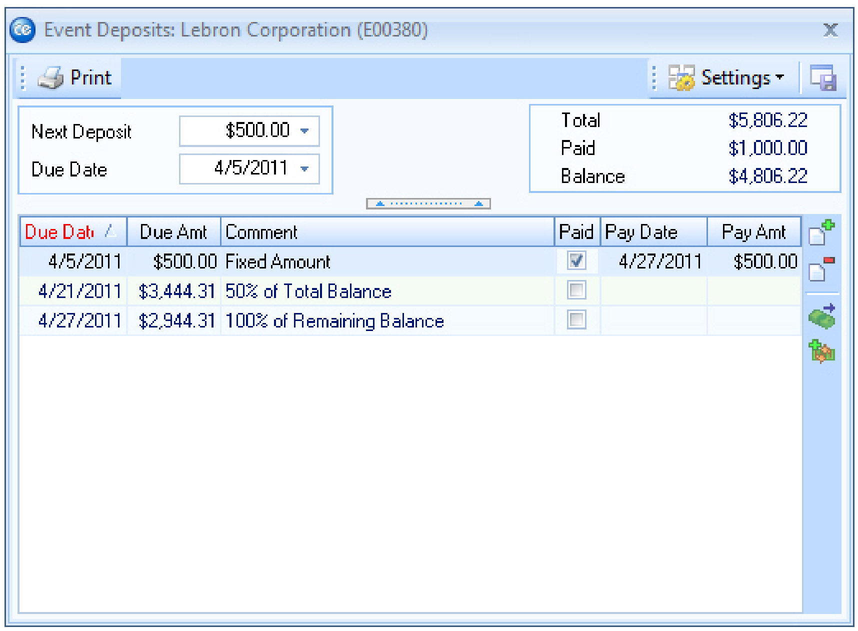
6. Enter or edit information as desired and click **OK**.
Result: *A new payment has been added to this event based on the paid*

deposit.
Note: *If you wish to review payments made for this event, click the **Event Payments** button , also at the lower right of the display.*

Adding Scheduled Event Deposits

1. In the Event Manager, retrieve the event for which you want to schedule a deposit.

2. Click on the **Event Deposits Due** button , located at the bottom right of the manager display.
   Result: *The Event Deposits window opens.*



3. Click the **Make Scheduled Deposits** button at the top of the Event Deposits window.
   Result: *A list of deposits is created, based on the conditional deposit schedules you have created in your program.*
   Note: *See above for information on making payments on these deposits.*

Creating Default Deposit Schedules

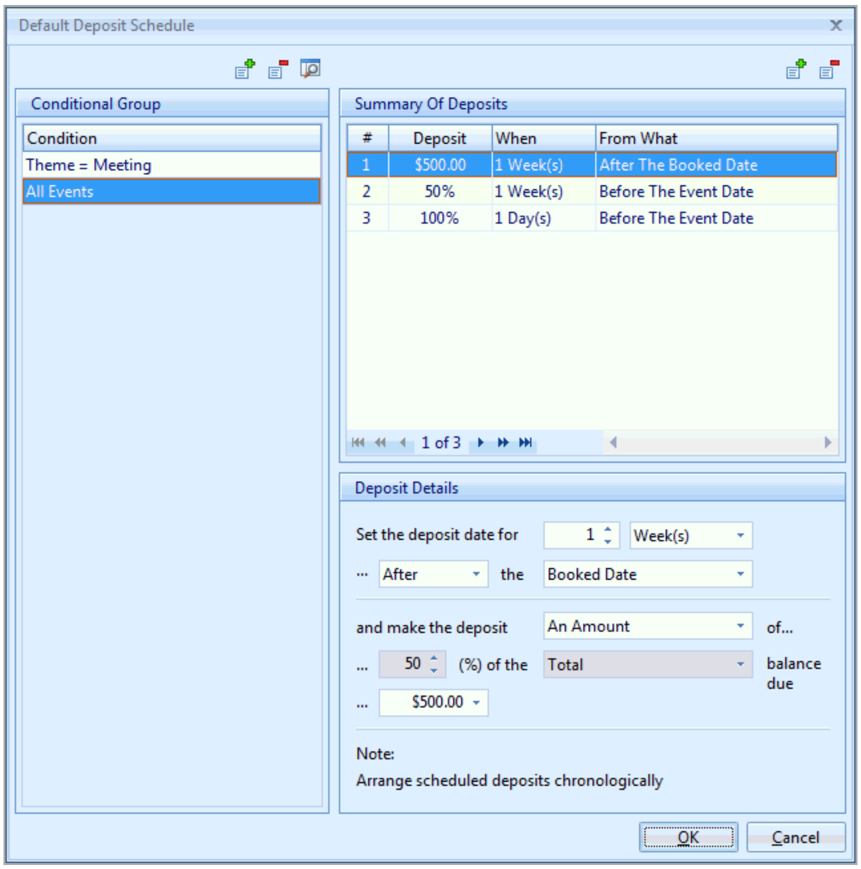
You can create automatic schedules of future deposits for your parties - complete with due amounts (in dollars or percentages of event totals) and due dates (relative to the event date or booked date), and then use these schedules for the various events that you book. Schedules can be conditional, so it applies only to a certain type of event - and you can even tell the program to automatically update the due amounts or due dates if details of the party change.

Note: This feature is not available in the Express version of the program.

Creating a Conditional Deposit Schedule

Tip: The program evaluates these conditions in the order they are listed - and stops when it reaches a condition that is true. For example, if your first condition for events says "Category = Business" and your second condition says "Status = Definite," when the program finds an event with a category of "Business" it will apply those required fields and stop - never evaluating for the second condition. For this reason, it is imperative that any condition that says "All" records ("Events," "Accounts," etc.), must be the LAST condition listed.

1. Click the **Administration** ribbon tab at the top of the Caterease screen.
2. Click the **Options** button and choose **Deposit Schedule**.
   Result: *The Default Deposit Schedule window opens.*



3. Click the **Add Group** button , located at the top left-hand side of the Conditional Group pane.
   Result: *The Select Condition window opens.*
4. Select a condition from the **Create a new group that applies to...** drop-down list. Choose from the following:

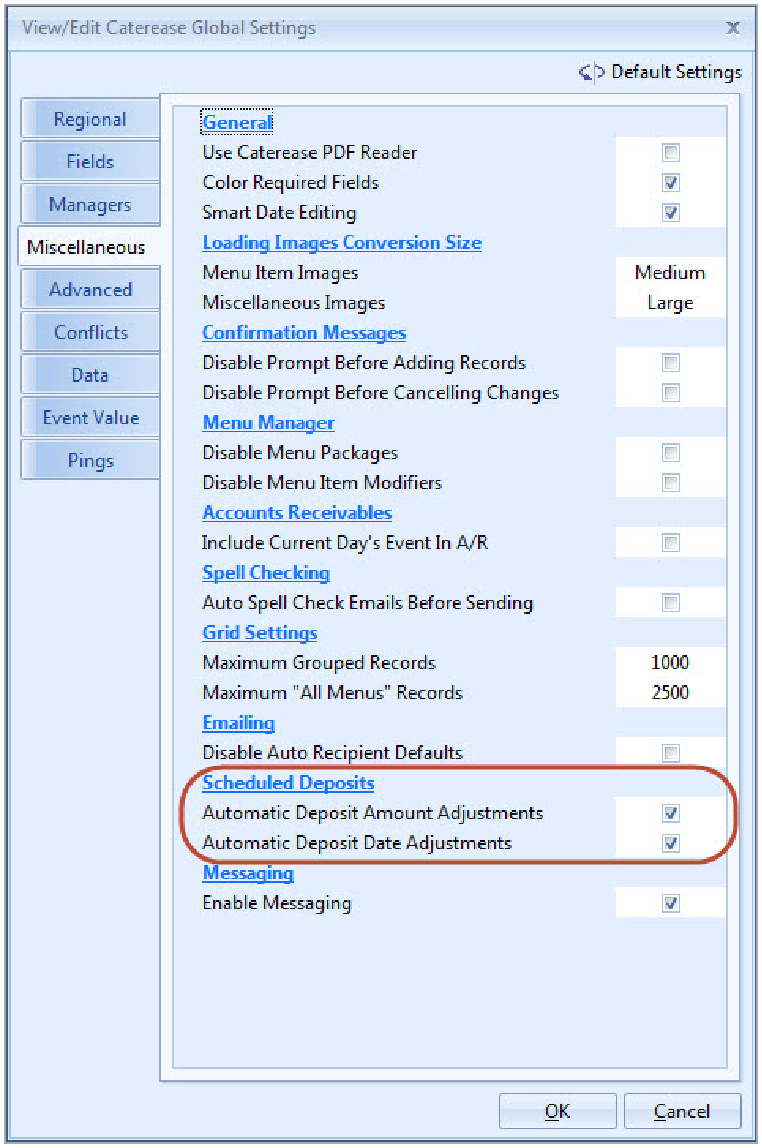
- **All Events**
  Note: *If All Events is selected, the second drop-down list will not display.*
- **Events with a Status** of (or Category of; Theme of; Operation of; Business Type of; Sales Representative of)
  Note: *If any of these options is selected, the second drop-down list becomes available, along with its corresponding drop-down list.*

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 (Booked Date).
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.
   - 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.

Setting the Program to Update Deposits Due Automatically

1. Click the **Administration** ribbon tab at the top of the Caterease screen.
2. Click the **Settings** button and choose **Global Settings**.
   Result: *The View/Edit Global Settings window opens.*
   Note: *All Managers and other windows must be closed to access this tool.*

3. Click the **Miscellaneous** tab on the left-hand side of the window.



4. Click the checkbox next to **Automatic Deposit Amount Adjustments**.
Note: *This setting causes the program to automatically recalculate percentage deposits ("50% of the event total,"etc.), if the event totals change. Fixed dollar amount deposits and deposits that have already been paid will not be affected.*

5. Click the checkbox next to **Automatic Deposit Date Adjustments**.
Note: *This setting causes the program to automatically alter the due date of future deposits ("10 days before the event date," etc.), if the relative event date changes. Deposits that have already been paid will not be affected.*

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

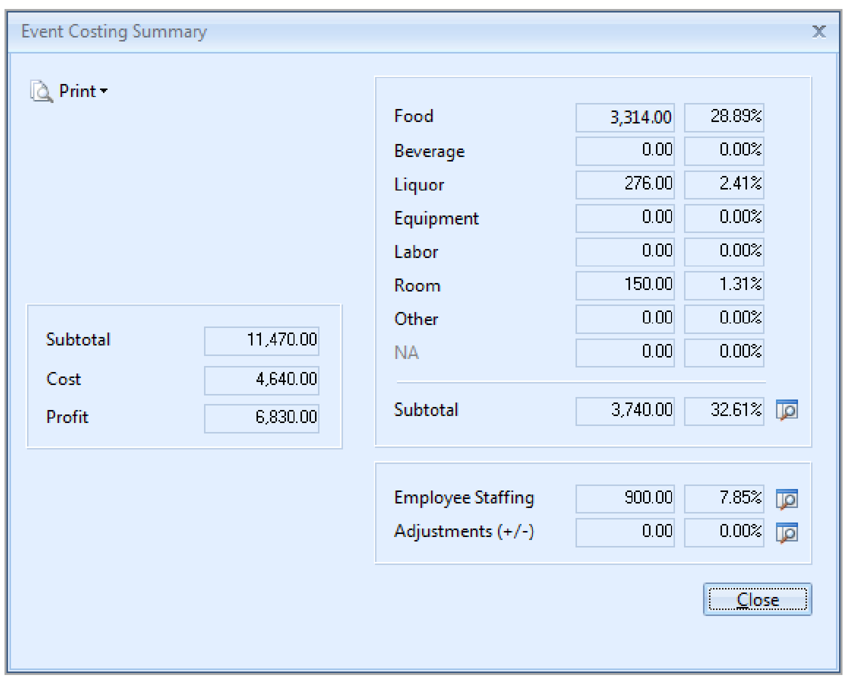
Managing Event Costing

The cost of an event is automatically calculated based on the cost of its menu items, the wages paid to staff working the party and any additional adjustments you choose to make. While all versions of Caterease allow you to enter a line item cost for each menu item, the Standard and Professional versions can automatically calculate an item cost based on its ingredients, and allow you to change those ingredients on-the-fly.

Note: In the Express version, you can review event cost and profit by clicking your right mouse button over the Financials area (top right of Event Manager) and choosing **Customize**.Then check the boxes next to "Cost" and "Profit."

Reviewing the Event Costing Summary

1. In the Event Manager, retrieve the event for which you want to reviewing costing.
2. Click the **Select** ribbon tab at the top of the screen.
3. Click the **General** button in the **Event Tools** group, and choose **Costing Summary**.
   Result: *The Event Costing Summary window opens.*



4. **[Optional]** Click the **View Line Item Details** button , located to the right of the Total Line Items field, to see a breakdown of the cost of each food/service item.
   Result: *The Food/Service Items Breakdown window opens.*
   Note: *You can manipulate the data in this grid in many ways, and print the grid details.*

5. **[Optional]** Click the **View Staffing Details** button to the right of the Employee Staffing field to review staffing cost breakdowns.
   Result: *The Staffing Breakdown window opens.*

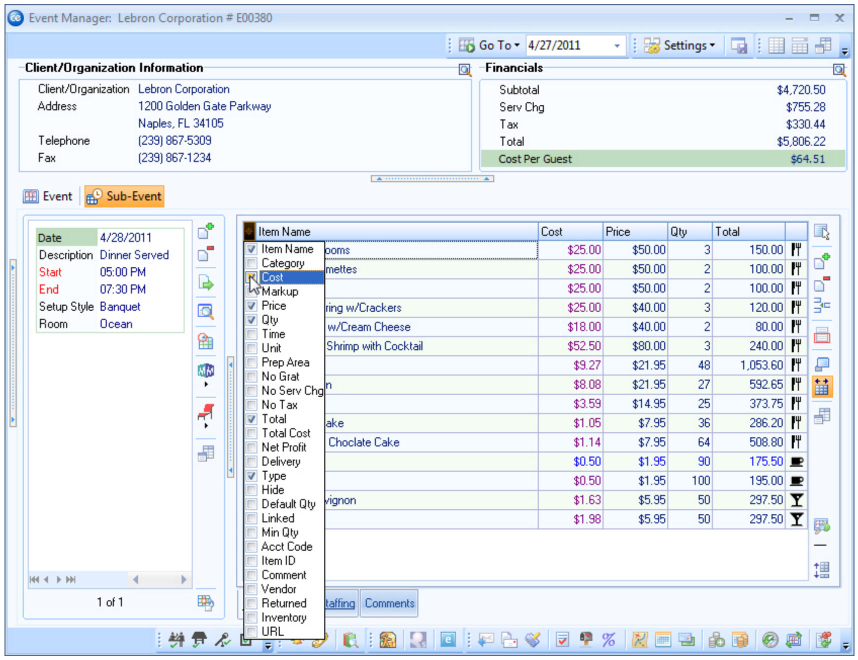
6. **[Optional]** Click the **View/Edit Costing Adjustments** button to the right of the Adjustments field to review, edit or add cost adjustments.
   Result: *The Event Costing Adjustments window opens.*
   Note: *You can add adjustments to the cost of an event easily (if, for example, there is an additional cost you are incurring that is not part of the menu or staffing of this event) by clicking the green plus sign button in this window.*

7. To print a costing summary for the current event, click the **Print Costing Summary** button at the top left of the Event Costing Summary window.
   Result: *A print preview of the Event Costing Summary displays.*
   Note: *If you have not yet saved recent changes to your event, you may be prompted to do so. You can also print the Event Costing Summary by clicking the* ***Home*** *ribbon tab and selecting* ***Prints > Event Subprints > Event Costing Summary****.*

Changing Menu Line Item Costs

1. In the Event Manager, click the **Sub-Event** button to show the meal(s) for the event.

2. In the grid on the **Food/Service** tab, click the **Quick Column Customizing** button , located to the left of the **Item Name** column heading.
   Result: *A drop-down list of optional columns appears.*



3. Click the checkbox to the left of the **Cost** column to display that column in the grid.

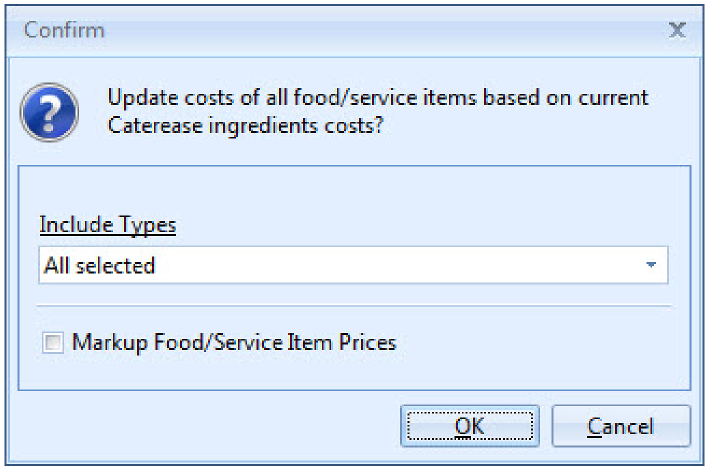
4. **[Optional]** Hold your left mouse button down on the **Cost** column title and drag it up or down in the drop-down list to reposition it on the grid, or drag and drop the column heading on the grid itself.

5. Click in the **Cost** column for any menu item in the grid and enter or edit a line item cost as desired.

Updating Event Costing Based on Ingredients Changes

1. In the Event Manager, click the **Select** ribbon tab at the top of the screen.

2. Click the **General** button and choose **Costing Update**.
   Result: *The Costing Update confirmation message appears.*



3. **[Optional]** Click the down arrow to the right of **Include Types** and select which type(s) of items you would like this tool to update.

4. **[Optional]** Click the checkbox next to **Markup Food/Service Item Prices** to have menu item prices also update.
   Note: *Prices will be marked up based on markup percentages.*

5. Click **OK**.

Establishing Default Base Price Markup Rates

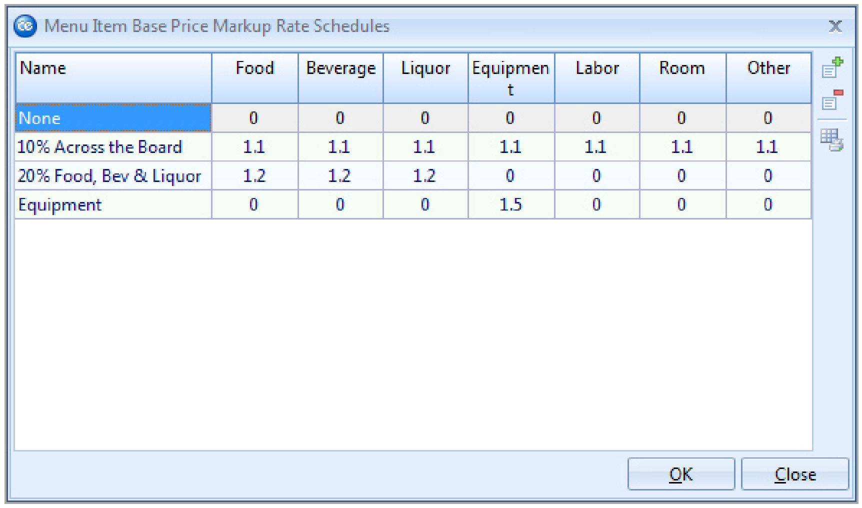
You can create specific markup rates to retrieve into an event and cause menu item prices to automatically adjust. Or, you can link specific markup rates to a client or site location - so whenever that client or location is used for a party, prices are automatically marked up accordingly.

Note: You can also select one of these markup schedules to default for each new event you create.

Adding a New Markup Schedule

1. Click the **Administration** ribbon tab at the top of the screen.

2. Click **General** > **Base Price Markup Rates**.
   Result: *The Menu Item Base Price Markup Rate Schedules window opens.*



3. Click the **Add Record** button , located on the right-hand side of the window.
   Result: *A new blank line is added to the list of rate schedules.*

4. Type a name for your new rate schedule, and press your **[Enter]** key.
   Result: *Your new name is saved, and your cursor moves to the first column in the schedule ("Food").*

5. Enter markup rates as desired for each type of menu item.
   Note: *These markup rates will be multiplied times the base price of items in your events when this schedule is applied, and should be entered in decimal format. (For example, a "20%" markup would be entered as "1.2" - or 1.2 times the base price.)*

6. Repeat as desired to add additional markup schedules.

   Note: *Clicking the **Delete Record** button*  *will delete the current selected schedule.*

7. When finished, click **OK** to close the window and save your changes.

Assigning a Default Markup Schedule to an Account

1. Click the **Account Manager** button in the **Main** group of the program's sidebar to access Account Manager.

2. Find the account for which you wish to assign a default markup schedule.

3. At the top left of Account Manager, click the tab that displays the Base Price Markup field.
   Note: *This field is not displayed by default; see "Displaying the Base Price Markup Field," below.*

4. Click the down arrow to the right of the Base Price Markup field.
   Result: *A drop-down grid appears, listing all available markup schedules.*
   Note: *See "Adding a New Markup Schedule," above, for more information.*

5. Choose a specific markup schedule from the list.
   Result: *The selected schedule is will default for all new events booked by this account.*

6. Close Account Manager, saving the changes.

Assigning a Default Markup Schedule to a Site Location

1. Click the **Setup** sidebar group on the left-hand side of the screen and click the **Site Locations** button.
   Result: *The Site Location Database window opens.*

2. Find the site location for which you wish to assign a default markup schedule.

3. Click in the Base Price Markup field.
   Note: *This field is not displayed by default; see "Displaying the Base Price Markup Field," below.*

4. Click the down arrow to the right of the Base Price Markup field.
   Result: *A drop-down grid appears, listing all available markup schedules.*
   Note: *See "Adding a New Markup Schedule," above, for more information.*

5. Choose a specific markup schedule from the list.
   Result: *The selected schedule is will default for all new events using this site location.*

6. Close the Site Location Database, saving the changes.

Displaying the Base Price Markup Field

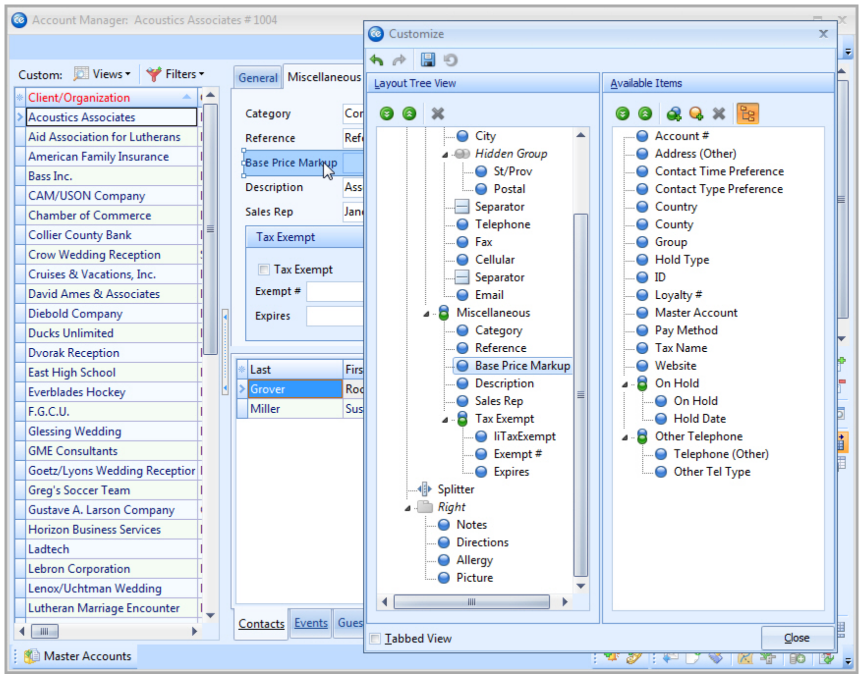
Tip: *As an alternative, you could drag and drop the field beneath another field on the in the left ("Layout Tree View") frame of the customize window to have it appear below that field on the screen.*

1. In Account Manager or the Site Location Database, click your right mouse button anywhere on the window.
   Note: *In Account Manager, this field can only be displayed in one of the areas at the top of the screen.*

2. Choose **Customize**.
   Result: *The Customize window for the form opens.*
   Note: *Do not right-click inside of fields; click on the form itself.*

3. On the right-hand side of the Customize window, hold your left mouse button down on the field called <u>Base Price Markup</u>.

4. Drag the field into the window, and place it beneath one of the existing fields.
   Note: *It is important to note your cursor's position as you drag this field. It will be easier to place this field beneath another field rather than to the right of a field. If you make a mistake, click the **Undo** button* *, located at the top left of the Customize window, and try again.*



5. Once the <u>Base Price Markup</u> field is in position, release your mouse button.
   Result: *The <u>Base Price Markup</u> field has been placed on the form.*

6. Click **Close** on the Customize window to close that form.

7. Click the **Save Window Settings** button  at the top right of the Account Manager window to save this arrangement as the new default look for your that form.

Unit 3: Establishing Global Settings

In the Setup area of your Katerease program, you can establish various settings for how your Event Manager behaves. These settings are global, meaning they affect every computer on your Caterease network. Therefore, the settings you establish are for you and for all of your colleagues who use the program.

Objectives:

Upon completing this unit, you will be able to:

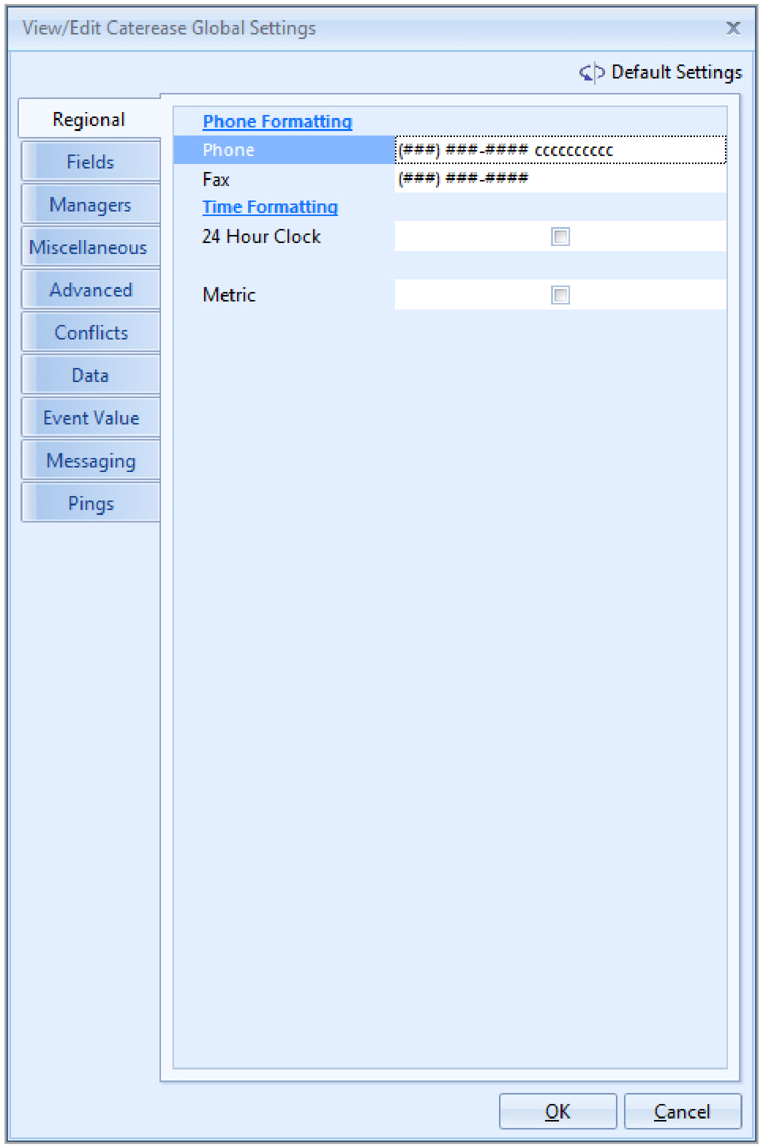
- *Establish or change default Global Settings for your Event Manager.*

Editing Global Settings

Viewing/Editing Global Settings

1. Click the **Administration** ribbon tab at the top of the screen.
2. Click **Settings** > **Global Settings**.
   Result: *The View/Edit Caterease Global Settings window opens.*
   Note: *As an alternative, you can simply right-click on the main screen and*

*choose **Preferences**.*



3. Click a specific tab on the left side of the window to edit settings related to that area of the program.

4. Edit settings as desired (see descriptions below).

Optional Preferences

The following options are available on the **Regional** tab of Global Settings:

Field	Description
Phone	Here you can establish the format for all phone number fields throughout the program - whether numbers, letters or other characters (dashes, periods) are per-

Field	Description
	mitted or even required - using the following guidelines: L (Upper Case L) This character requires an alphabetic character only in this position (meaning you cannot leave it blank). For the US, this is A-Z, or a-z. l (Lower Case L) This character permits only an alphabetic character in this position, but does not require it. A (Upper Case A) This character requires only an alphanumeric character in this position. For the US, this is A-Z, a-z or 0-9. a (Lower Case A) This character permits only an alphanumeric character in this position, but does not require it. C (Upper Case C) This character requires an arbitrary character in this position (meaning the only requirement is the field must not be blank). c (Lower Case C) This character permits an arbitrary character in this position, but does not require it (meaning almost anything goes). 0 (Number Zero) This character requires only a numeric character in this position. 9 (Number Nine) This character permits only a numeric character in this position, but does not require it. # (Pound Sign) This character permits a numeric character or a plus or minus sign in this position, but does not require it. Characters To Avoid: Do not use the ! (Exclamation Point), > (Greater Than Sign), < (Less Than Sign), \ (Backslash), : (Colon), / (Forward Slash), ; (Semi-colon) or _ (Underscore or Shift - Hyphen).
Fax	Here you can establish the format of all fax number fields throughout the program, using the guidelines listed above.
24-Hour Clock	With this checkbox selected, all time fields in the program will appear in 24-Hour format ("1:00PM" will display as "13:00," etc.).
Metric	With this checkbox selected, measurements in your Ingredients List will be shown in metric (liters, grams, etc.), as opposed to quarts, pounds, etc.

Fields Tab Options

Field	Description
Time Fields	Here you can enter new names for the various time fields available for your events, as well as make up to "Extra" time fields to use as you want. Note: In addition to these fields, you can establish unlimited and unique event timelines for any event.
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	With this checkbox selected, there will be an inverse relationship between the two guest fields above. 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." Note: 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).

Field	Description
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 - using the guidelines outlined under "Phone" in the "Regional Tab" topic, above.

Managers Tab Options

Field	Description
Default Guaranteed Guests from Planned	This option causes Caterease to default the "Guaranteed" guest count for a particular event to a certain percentage of the "Planned" guest number, as soon as you enter a number into the "Planned" guest field. Note:Click the plus sign to the left of this option to set the default percentage.
Use Gtd Guests To Determine Guest Count	With this option selected, the "Guaranteed" guest count will take top priority as the guest count of an event if it is a larger number than the "Actual" guest count.. Note:Click the plus sign to the left of this option to use this number in menu item quantity linking
Automatically Set Print Dates	Click this option to have Caterease automatically record the current date whenever you preview a print of a contract, invoice or BEO, thereby allowing you to track by those dates. (These dates can also be displayed on the Event Manager window.) Note:Any print can be designated as a "Contract", "Invoice" or "BEO" when you create it in your print designer. See "Customizing and Suppressing General Information" .
Auto-Close Event After Invoice	With this option selected, when you generate an invoice the event is automatically "Closed" by the program. You can then deny certain users access to closed events (see Add a New User).
Auto-Close Event Upon Final Payment	Click this checkbox if you wish to close events after a final payment has been posted (and the balance becomes "0"). You can then deny certain users access to closed events.
Set "Closed" Status When Auto-Closing Event	With this option selected, Caterease will automatically set the event status as "Closed" whenever the program automatically closes an event due to either of the two settings above.
Disable Keyboard Input For Room Selection	With this option selected, users will be required to pick room names from a list when booking an event, rather than typing them by hand. NOTE:TYPING ROOM NAMES BY HAND ALLOWS THE POSSIBILITY THAT THE NAME MIGHT BE MISSPELLED AND THUS THE ROOM MIGHT ACCIDENTALLY BE DOUBLE-BOOKED.
Display Currency Symbol In Contracts	This option causes the local currency symbol established in your "Regional Settings" ("$" in America) to print next to the totals in the financial summary section of contracts and BEO's.
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 affect on its sub-events.
Prompt For Status Change After Payment	With this option selected, whenever a payment is entered for a event with a status other than "Definite", Caterease will display a confirmation window requesting to automatically update the status.
Enable Quick Item Insert	This option - available only in the Professional version of the program - enables users to hit the down arrow on their keyboards to add a new blank line to the Food/Service tab of Event Manager, and then incrementally search for menu items as they type.
Discount Set-	With these options selected, gratuity, service charge and/or tax for an

Field	Description
tings	event will not be applied until any discount you might have set using the Event Discounts tool has been calculated. For example, an event with a total of $1000 and a 10% discount will have gratuity/tax/service charge applied to the discounted total of $900.
Use Contact "First" + "Last" When Copying	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 (this might be preferable if you are doing business with an individual rather than a company.) With this option selected, that copy will be in the format of "First Name Last Name,"as opposed to the default "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).

Miscellaneous Options

Field	Description
Field	Description
Color Required Fields	With this option checked, any fields designated as required field in your program's Setup menu will be colored in red. With this option un-checked, those fields will not look any different from other fields, but will still be required information when you are entering data.
Smart Date Editing	With this option checked, users can enter terms such as those listed below into date fields and the program will automatically convert them to the appropriate date. (Professional version only)

What you type	*What you get*
today	*the current date*
today+any number	*the current date plus that number (i.e., "today+7" would give you the date one week from now*
Friday (or any other day)	*the date on the next coming Friday (or any other day)*
eom (end of month)	*the date on the last day of the current month*
eom+/-any number	*the last date of the current month plus or minus that number (i.e., "eom+1" would give you the first day of next month.*
bom	*the date on the first day of the current month*

Field	Description
	bom+/-any number — *the first date of the current month plus or minus that number (i.e., "bom+1" would give you the second day of current month.* *7/4/15* — *07/04/2015* *7-4-15* — *07/04/2015* *07/04/2015* — *07/04/2015* *July/4/15* — *07/04/2015*
Menu Item Images	To avoid imbedding large image files in your data and backups, you can use this option to have the program automatically shrink any images used for menu items in your Menu Manager.
Miscellaneous Images	As with above, you can avoid bloating your database with image files by using this option to have the program automatically shrink images used in various areas in the program, including in your Marketing Tools merge documents or as logos in your Print Designer prints.
Disable Prompt Before Adding Records	With this option checked, the program will not prompt you to confirm your choice when you add records (new clients, events, etc.).
Disable Prompt Before Canceling Changes	With this option checked, the program will not prompt you to confirm your choice when you cancel changes to a record you have edited.
Disable Menu Packages	With this option checked, the "Packages" tab will not be visible in Menu Manager, and users will not be able to create automatic menu item packages.
Disable Menu Item Modifiers	With this option checked, the "Modifiers" tab will not be visible in Menu Manager, and users will not be able to attach modifiers to menu items .
Include Current Day's Events in A/R	With this option checked, reports and queries run to show accounts receivable will include revenue from the current day's events.
Auto Spell Check Emails Before Sending	With this option checked, emails will be scanned for spelling errors as they are sent from Caterease.

Advanced Tab

Field	Description
Blank Merge Field Value	This allows you to create optional text to appear on a print in the place of a merge field that has no data. For example, if the merge field for [Function Room Name] appears on a letter, and that letter is printed from an order that has no function room, there will be a blank space where the merge field is - unless you enter "N/A" or something similar here.
Extended Measure	Select this option to have conversions for ingredients extend to their smallest appropriate measure. For example, if a meal calls for 25 Teaspoons of salt,

Field	Description
Conversions	the program will automatically convert that amount to 8.33 Tablespoons. With the Extended Measure Conversions option selected, this conversion would extend to "8 Tablespoons, 1 Teaspoon."
Round Measure Conversions to Nearest Qtr	This option will round conversions for ingredients to their nearest quarter measure. For example, if an item called for 25 Teaspoons of salt - which converts to 8.33 Tablespoons - the conversion would be listed as "8.25 Tablespoons." Note:This option has no effect on conversions if "Extended Measure Conversions" (above) is also selected.
Enable Auto Address Completion	With this option selected, the program will automatically match any city or zip code entered when adding a new client, and will either automatically fill in the corresponding zip code or city, or offer a popup list of all available zip codes for the city you have entered. Note:This is not a USPS zip code lookup system; it is merely checking your current database to see if the city or zip code you entered already exists.
Maximum Size of Embedded File	Here you can limit the size of any files you may embed in your database using the various "Related Files" tools - "Event Related Files", "Account Related Files" or "Employee Related Files." You simply enter a maximum files size by typing, or click the "up" and "down" arrows to adjust the number by increments of "1" (or the arrows in the middle to move increments of "0.5").

Conflicts Tab

Field	Description
Disable Room Capacity Checks	Click here to have your Event Manager ignore capacity conflicts in your function rooms. Thus, you will be able to make up a setup style "on-the-fly" or deliberately increase your guest count to exceed the chosen room's capacity and not receive any conflict messages.
Disable Unknown Room Checks	With this option selected, you can make up a room name "on-the-fly" as you book an order, and Caterease will not give you a message saying it does not recognize the room name.
Disable Room Wait List	If a particular banquet room is unavailable for an event, that event can be placed on a "wait list" and can later be moved should a room become available. This option disables that feature, and removes information related to wait lists from your Event Manager and Event Scheduler screens.
Check For Conflicts Within The Same Event	If you have an event with multiple sub-events, this option will cause the program to check for conflicts (room or staffing) within that one party. For example, if a large event is using your dining room for breakfast and then again later on for lunch, this option will ensure that the times for those two meals do not conflict or overlap. With this option unchecked, events will be allowed to conflict with themselves. Note:This option may be of most use for tracking breakout rooms. For example, if you are using Ballroom A-B for one sub-event in a party, and Ballroom B-C for another, you might forget that both of these rooms require Ballroom B to be available. Thus, rooms A-B and B-C cannot be used at the same time. In addition, this feature will check for duplicate employee conflicts. This will prevent you from booking an employee twice within the same sub-event.
Disable Staffing Checks	Click here to have your Event Manager ignore event staffing conflicts. Thus, you will be able to deliberately select staff any employees for events regardless of any work time restrictions and not receive any conflict messages.
Disable Inventory Checks	Click here to have your Event Manager ignore inventory conflicts. Thus, you will be able to deliberately select a limitless number of an inventoried item and not receive any conflict messages.
Disable Scheduled Items Check	Click here to have your Event Manager ignore scheduled items conflicts. Thus, you will be able to deliberately select scheduled items regardless of time restrictions and not any receive any conflict messages.
Disable	Caterease automatically compares the name, address and ten digit phone number of all new accounts/prospects to confirm there are no duplicates in

Field	Description
Duplicate Account Checks	your program. This option will disable that feature.
No Quantities For Food/Service Items	Clicking this checkbox causes the program to warn you if you are saving an event containing menu items that have prices but NO quantities.
Event Date Has Past	Clicking this checkbox causes the program to warn you if you are saving an event with a date that has past.
No Tax Exempt Number	Clicking this checkbox causes the program to warn you if you are saving a tax exempt event that has no corresponding tax exempt number.
Tax Exempt Number Expiration	Clicking this checkbox causes the program to warn you if you are saving a tax exempt event that may have a tax exempt number but is missing an expiration date.
Notify Upon Payment Method Changes	Clicking this checkbox causes the program to prompt you if you post a payment to an event with a pay method that differs from the default pay method of the event. Clicking "Yes" will cause the program to automatically change the default pay method to the pay method entered for the new payment.
Event Checklist Items Due	Clicking this check box causes the program to warn you if you are saving an event with any checklist items that are due (or overdue) to be completed.

Data Tab

Field	Description
Automatically Delete Info	This setting causes the program to automatically delete certain data after a certain number of days (see below), and is available for the following areas of the program: • Audit Trail Deletes event changes that have been tracked through the audit trail • Reminders Deletes any reminders (active or inactive) that have been created • Web Orders Deletes web orders that have been processed into Web Order Manager (if those web orders have been accepted as events, those events will remain) • Backups Deletes program backups that have been created • Saved Emails Deletes emails that were sent from Caterease and automatically stored in Contact Manager • Diagrams Deletes banquet room diagrams made for events (using the Meeting Matrix or Room Viewer interface) • Related Event Files Deletes any files (pdf's, jpg's, etc.) that have

Field	Description
	been associated with your events • Scheduled Notes Deletes notes created in the Scheduler • Credit Card Information Deletes credit card information entered when posting payments
Delete After Days	Here you can enter the number of days after which you want the data to be automatically deleted

Other Settings

Field	Description
Disable Audit Trail	This option, found under "Audit Trail", will turn off the audit trail feature so changes made to events will not be tracked.
Remove From Active Reminders After ? Days	This option, found under "Reminders", will cause active reminders that have not been addressed after a certain number of days to be automatically removed from your active reminder list.
Disable All Credit Card Access	This option, found under "Credit Card Information", disables all credit card information everywhere in the program. Note: If your company must maintain strict PCI compliance, check this box to disable all credit card number storage in Caterease.
Password Protect Credit Cards	This option, found under "Credit Card Information", requires each user to enter a password to access credit card information. Note: Individual users can be prohibited from accessing credit card information at all through system security.

Event Value Tab

Field	Description
Show User-Defined Event Value	Click this checkbox to have your custom "Event Value" be optionally visible in Event Manager. Note:This field can be renamed using the "Customize Names" feature.
Included In Value	You can create a custom event value to include on your various event prints by combining any of the following event financial totals: • Subtotal • Gratuity • Service Charge • Tax 1 • Tax 2 • Tax 3

Messaging Tab Options

Field	Description
Enable Messaging	Click this checkbox to turn on the "User-to-User Instant Messaging" feature in the program. Note: Each user may still need to enable this feature in his or her personal program preferences.

Pings Tab Options

Field	Description
Enable Auto-	Click this checkbox to turn on the "Automatic Notifications" feature, caus-

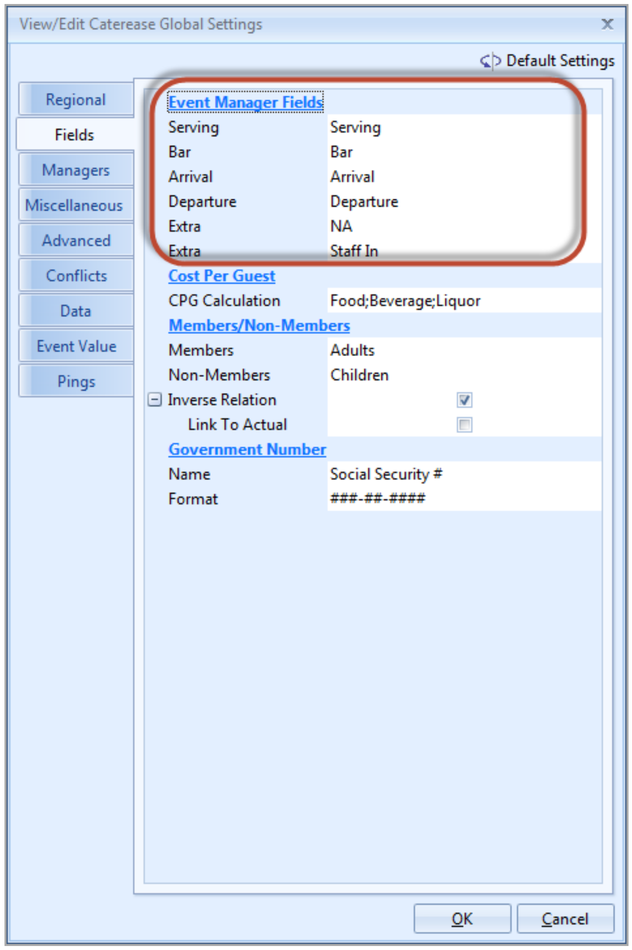
Field	Description
matic Notification (Pings)	ing automatic pop-up notifications for certain changes made in the program. Note: Each user may still need to enable this feature in his or her personal program preferences.
Notify On Event	These settings identify the changes in the program that can cause an automatic pop-up notification. (Each user can disable any of these options in their user preferences.) Options include: • Status Change • Event Date Change • New Booking (Whenever a new event is booked) • Deletion (Whenever an event is deleted) • Food/Service Change (Changes to item price, cost or quantity, and the selection or addition of a new menu item)

Renaming the Time Fields

Perhaps you need a "Hot Hors D'oeuvres" time, a "Chef Arrival" time, a "Tee Time" (for golf clubs), or some other custom field. With Caterease, you can rename existing time fields, make up a field of your own and/or remove fields that do not apply to your business. The only time fields that are hard-coded are Start, End, and Delivery.

1. Click the **Administration** ribbon tab at the top of the screen and choose **Settings**.
2. Click the **Fields** tab.
3. Within the **Event Manager fields** area, click into any time field and type a new name for that field.
   Note: *Changes will take effect throughout the program anywhere these times are found.*

4. When finished, click **OK**.



Unit 4: Advanced Menu Features

There are many advanced menu item details beyond simply the name, price, and quantity, and these details can optionally be displayed and edited in the Food/Service grid in Event Manager. Caterease allows you to create a description of a menu item that can be any length and formatted in any way. Then, the descriptions will be automatically retrieved into an event, along with a particular menu item, and can be modified in the event, on-the-fly. Additionally, you can use Special Editing options to link the quantities of certain menu items to your guest count, or you may elect to hide them on certain prints, or even copy them from one event to another.

Objectives:

Upon completing this unit, you will be able to:

- *Insert page breaks for prints.*
- *Copy an entire sub-event.*
- *Hide items on a print.*
- *Link/unlink menu item quantities to guest count.*
- *Make batch-changes to menu items.*

Managing Advanced Menu Item Details

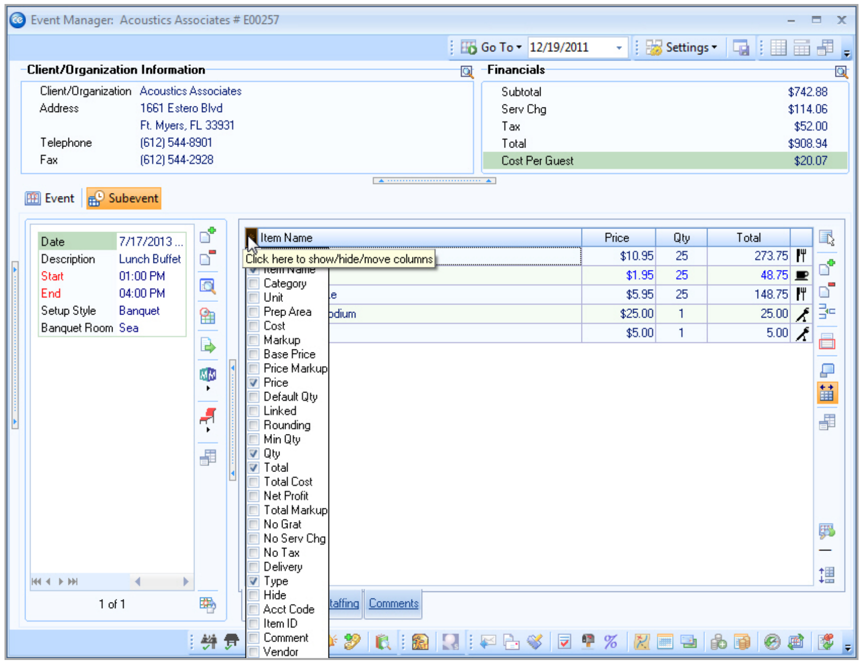
Customizing the Food/Service Grid

***Tip:** If you want the new columns you've selected to be displayed in the Food/Service grid as a default, click the **Save Current Window Settings** button at the top right of the Event Manager window.*

1. Click the **Quick Column Customizing** button, located at the top left of the Food/Service grid.
   ***Result:** A drop-down list of optional columns appears.*
   ***Note:** See "Fields Available in the Food/Service Grid," below, for a list of available columns for this grid.*

2. Click the checkbox next to any column heading to have that column appear in the grid.
   ***Result:** Any columns with checks next to them appear in the grid.*

   ***Note:** The **Automatically Set Column Widths** button on the right-hand side of the **Food/Service** tab is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to* *scroll horizontally.*

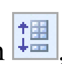


3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.
   Note: *You can also drag column headings left and right in the grid itself.*

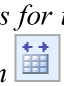
4. Enter information into the new fields as described in "Fields Available in the Food/Service Grid," below.

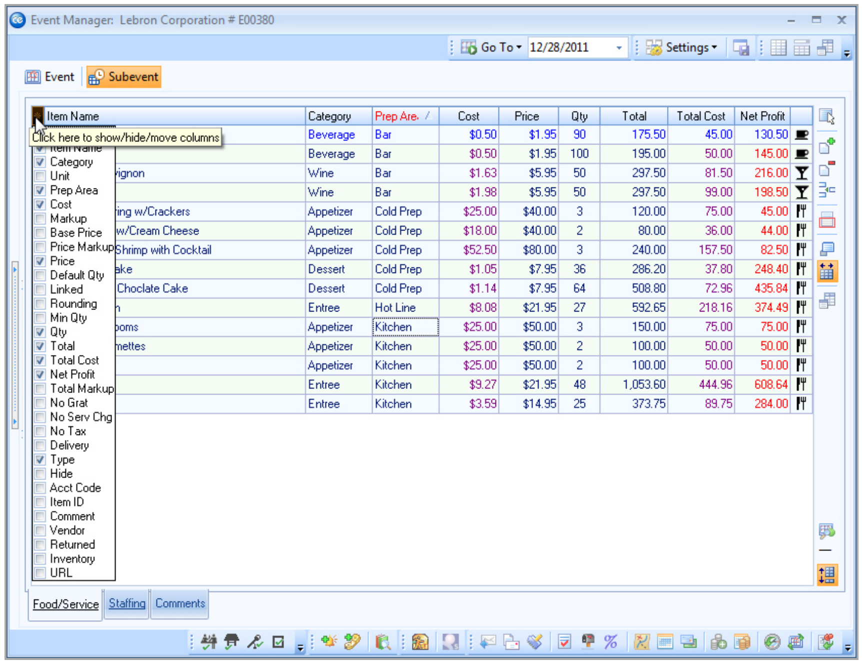
Using the Expanded Grid Mode

Tip: *As an alternative, you can save multiple custom Food/Service grid views using the Food/Service Item Details window.*

1. Click the **Full Expand** button , located at the bottom right of the **Food/Service** tab.
   Result: *The Food/Service grid is expanded to take up the entire Event Manager screen.*

2. Click the **Quick Column Customizing** button , located at the top left of the Food/Service grid, and choose columns to display as described in the topic above.
   Result: *Any columns with checks next to them appear in the grid.*
   Note: *See topic below for a list of available columns for this grid.*

   Note: *The **Automatically Set Column Widths** button*  *on the right-hand side of the **Food/Service** tab is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to* *scroll horizontally.*



3. **[Optional]** Drag column headings left and right in the grid to reposition them, and click column headings to sort by that detail.

4. When ready, click the **Full Expand** button again to return your Event Manager to its normal display.

5. **[Optional]** Click the **Save Current Window Settings** button  at the top right of the Event Manager window if you want this to be saved as the default arrangement for your expanded Food/Service grid.
*Note: Settings can be saved before or after returning to normal display in Step 4 above, and will not affect the "un-expanded" grid display on your **Food/Service** tab.*

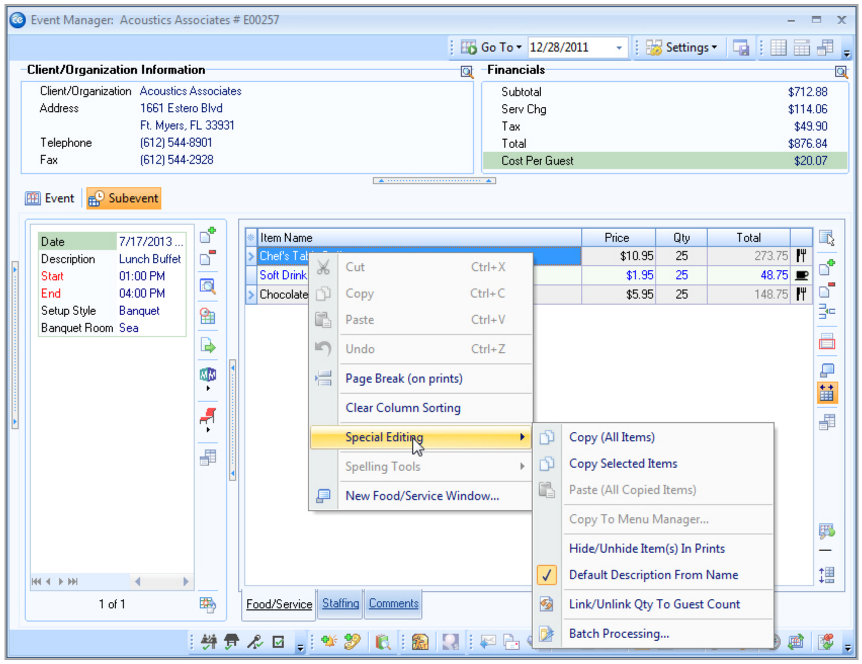
Fields Available in the Food/Service Grid

Field	Description
Name*	Identifies the menu item; can be printed on event prints in lieu of or in addition to description (see below).
Price*	Indicates the price of the menu item.
Qty*	Indicates the quantity of a particular menu item ordered for an event; multiplies by price to calculate total for that item.
Total*	Calculates the product of the item's price multiplied by its quantity
Category	Allows you to categorize menu items for tracking purposes; offers a customizable quickpick list of options, while "Type" (see below) is a hard-coded field (e.g., items with a Type of "Liquor" can be separated into categories of "Beer", "Wine", "Liquor", etc.); can be optionally included on custom prints.
Acct Code	Offers a unique identifier for the menu item; used in interfaces with third-party software.

Field	Description
Cost	Indicates the cost of the menu item; can be directly typed into the field, or can be automatically calculated as a sum of ingredient item costs.
Unit	Identifies the unit of purchase for the menu item; can be used for tracking purposes.
Prep Area	Indicates the area or personnel responsible for preparing the menu item; e.g., "Kitchen", "Bar", "Cold Prep"; can be used for tracking purposes or optionally included on prints; event menus are separated based on this field on the Production Sheet event sub-print.
No Tax	Offers a checkbox to make the menu item non-taxable.
No SC	Offers a checkbox to remove service charge from the menu item.
Total Cost	Calculates the product of the item's cost multiplied by its quantity.
Net Profit	Calculates the difference between the item's total minus its total cost.
Delivery	Offers a checkbox allowing you to designate a menu item as deliverable; items must have this box checked to appear on delivery prints and reports.
Type*	Allows you to categorize items as being "Food", "Beverage", "Liquor", "Equipment", "Labor", "Room" or "Other"; list is hard-coded; THIS DETAIL IS IMPERATIVE AS IT DETERMINES TAX, SERVICE CHARGE AND GRATUITY RATES FOR INDIVIDUAL ITEMS.
Hide	Offers a checkbox allowing you to hide this menu item on event prints that are set to allow item hiding; achieves the purpose of "passing notes" to the kitchen or other back-of-house staff
Linked	Offers a checkbox allowing you to link the quantity of this menu item to the guest count of the sub-event.
Comment	Allows up to 50 characters of general comment about a menu item; can be optionally included on prints.
Item ID	Offers a unique identifier for the menu item; used in interfaces with third-party software.
Vendor	Identifies a vendor responsible for providing the menu item.
Returned	Indicates the number of each menu item that was returned; allows you to track and compare to the number ordered (quantity).
Description**	Allows you to create a long, flowing paragraph of text describing a menu item; offers complete font formatting; can be included on event prints.
Recipe**	Allows you to type any amount of text describing steps taken in preparing a menu item.
Ingredients**	Lets you create a detailed list of all ingredients needed for a menu item, including the quantities and costs of ingredients; automatically calculates based on the quantity of menu items ordered.
Required Items**	Lets you create a packing list of items required when serving the menu item (e.g., silverware sets, napkins, sternos etc.), including quantities; automatically calculates based on quantity of menu items ordered.
* Displayed on the grid by default. ** Displayed below the grid on the Food/Service tab.	

Using Special Editing Options

1. Click your right mouse button anywhere on the **Food/Service** tab and select **Special Editing**.
   Result*: A pop-up menu opens.*



2. Choose one of the following options:

Option	Description
Copy (All Items)	Copies all menu items currently listed on the event's Food/Service tab so they can be pasted into another event.
Copy Selected Items	Copies only the selected menu items for pasting in another event.
Paste (All Copied Items)	Pastes all previously copied menu items into the current event.
Copy to Menu Manager	Copies the currently selected item into Menu Manager, prompting you to select a destination menu (for new items) or to confirm you want to replace an existing item.
Hide/Unhide Item(s) in Prints	Designates the selected item as being hidden or not hidden on custom prints (designate which prints show "hidden" items in Print Designer or Marketing Tools; when highlighted, the item is hidden).
Default Description from Name*	Causes the text you type under Item Name in the Food/Service grid to default in the Description of the item (toggles between enabled and disabled).
Link/Unlink Qty to Guest Count	Alternatively links or unlinks the quantity of the currently selected item to the number of guests for this sub-event (when highlighted, the item is linked).
Batch Processing	Allows you to change certain details ("Type", "Category", Prep Area") of an entire group (batch) of menu items at one time.
* This is the ONLY option available on the Express version.	

Inserting Page Breaks

The page break inserts a marker after the item you select. This marker indicates that the item is to appear on a separate page. A well-placed page break will enable your prints to be more logically organized (perhaps serving as dividers among soups and salads, entrees, desserts, etc.).

Inserting Page Breaks

1. Click on any Sub-Event in Event Manager.
2. From the **Food/Service** tab, right-click where you would like a new page to begin.
3. Select **Page Break (on prints)**.
   Result: *A yellow line is inserted under the last item name which will appear before the page break. When you generate a print, the designated item will display on its own page.*

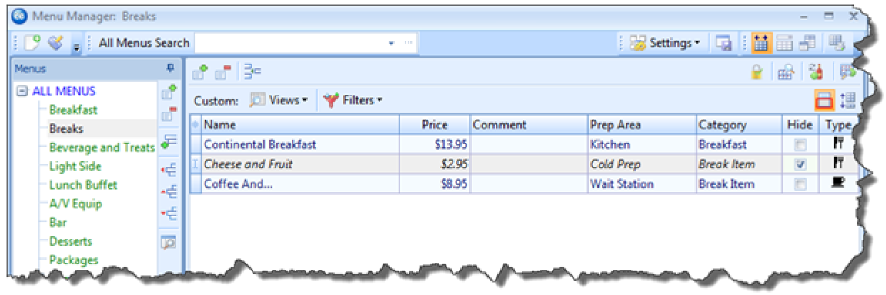
Designating a Menu Item as Hidden in Prints

You can elect to hide an item on an event's Food/Service menu from appearing on a print, and you can further decide which specific prints will allow this kind of item hiding. Why would you want to hide a menu item in a print? One reason you might want to do this is to include notes to your kitchen or back-of-house about a particular menu item, and not have those notes appear on the customer's contract.

Establishing a Menu Item as Hidden

1. Access the Menu Manager by clicking the **Menu Manager** button on the **Setup** sidebar on the left-hand side of your screen.
2. On the left-hand side of the Menu Manager, click the title of the menu containing the item you want to hide.
3. On the right-hand side of the screen, select the menu item you want to hide in a print.
4. Click the checkbox in the Hide column for the menu item.
   Note: *If the "Hide" column is not currently displayed on your screen,*

retrieve it from your Quick Column Customizing tool.



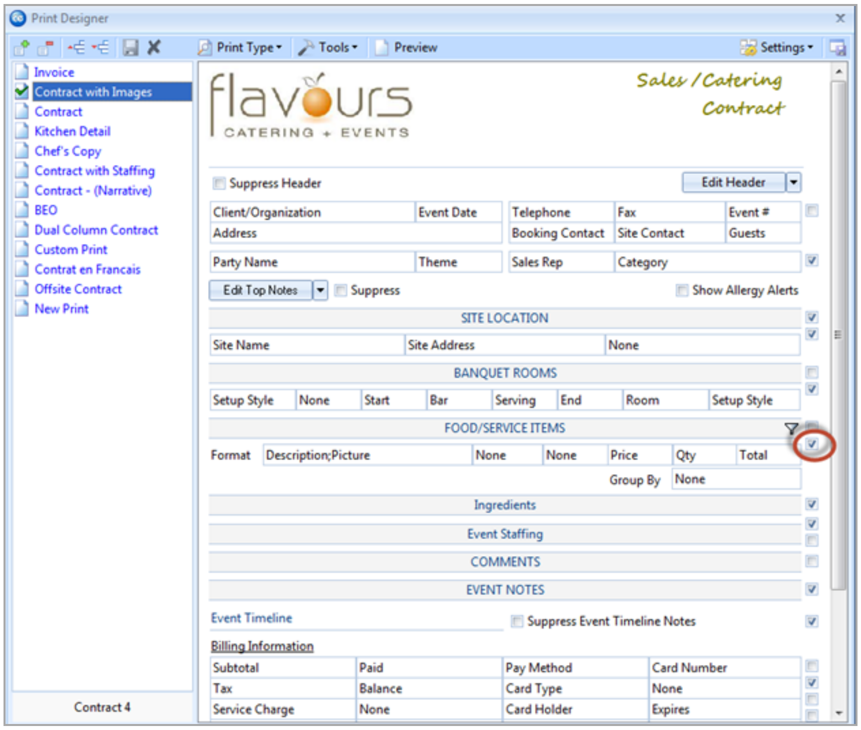
Allowing Item Hiding on a Print

1. Access the Print Designer by clicking the **Setup** sidebar item on the left-hand side of your screen and clicking **Print Designer**.

2. On the left-hand side of the Print Designer, click the print you would like to allow item hiding on.

3. At the middle right of the print in the designer, click the checkbox next to **Allow Food/Service Item Hiding**.
   Result: *When selected as a menu item for an event, this item will be displayed in italics and will not be shown on any print.*
   Note: *You can remove this setting on-the-fly for a print, by clicking your right mouse button and selecting* ***Hide Items in Prints*** *(this will remove the highlight and deactivate the button).*

4. When finished, close out of the window.



Linking and Unlinking Guest Count

if you have any menu items that generally sell as one per each guest attending a party, you can link the quantities of those items to your guest counts. For example, if you have 102 guests attending an event and each one of them will be receiving a soft drink, this link will give soft drinks a quantity of 102 as soon as you retrieve it into the event. Furthermore, if you should change that guest count to another number, such as 107, the quantity of soft drinks will increase automatically. The steps below discuss linking and un-linking menu items on-the-fly from within an event.

Linking Quantity to Guest Count

Tip: *As an alternative, you may right-click in the grid, select* ***Special Editing****, and choose* ***Link/Unlink QTY to Guest Count****.*

1. In Event Manager, click the **Sub-Event** button to show the meal for the event.
2. In the grid on the **Food/Service** tab, click the **Quick Column Customizing** button, located at the left of the **Item Name** column heading.
   Result: *A drop-down list of optional columns appears.*
3. Click in the checkbox to the left of the **Link** column to display that column in the grid.

Linking Sub-Event Guest Count to General Guest Counts

The Linking Quantity to Guest Count feature, described above, links the quantity of a menu item to the guest count of a specific sub-event. This could be different than the general guest count of the party. You can link these two numbers together, if you want, so that changing the guest count on the General display in Event Manager automatically updates the guest count of the sub-event (and thus carries through to the menu item quantity as well.

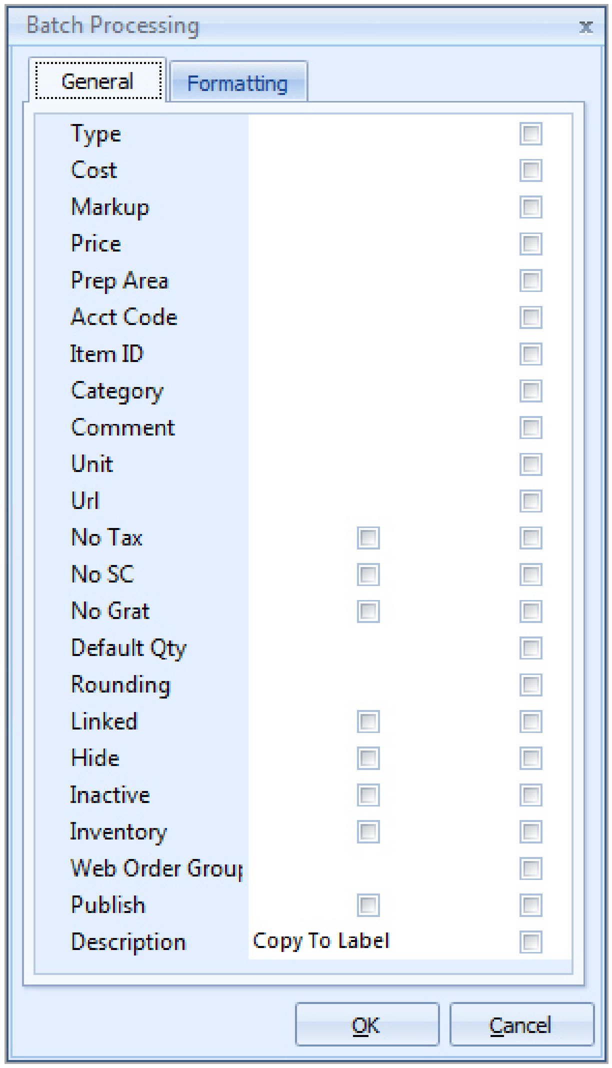
1. Click the **View/Edit Current Sub-Event** button, located to the right of the Sub-Event pane.
   Result: *The Sub-Event window opens.*
2. Click the **Tools** button at the top right-hand side of the Sub-Event window.
3. Choose **Link Guests to Event**.

Making Changes to Menu Items in Batch

You can make changes to multiple menu items in your default menus simultaneously. Change such details as menu item Type, Category, whether the item is published to your online ordering website, whether an item is inventoried or a host of other options - including basic font formatting of menu item Descriptions, Recipes, Labels or Notes.

Batch Processing Menu Items

1. In the left pane of the Menu Manager window, click the title of the menu containing items you want to edit (or click **All Menus** to select items from multiple menus simultaneously).
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 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.*
   Note: *If you right-click an item that's not currently selected, all selected items become unselected.*
4. Choose **Special Editing** > **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 menu items.

6. In the field itself, enter the new value you would like for all selected menu items.
   Note: *Most fields have for your convenience. Some, such as No Tax, No SC, Linked, Hide, etc., have checkboxes that you can enable or disable for all selected menu items.*

7. **[Optional]** Click the **Formatting** tab and establish formatting changes (font style, size and alignment), then click the checkbox at the bottom of the tab to indicate which detail of all selected menu items you want reformatted

(Descriptions, Recipes, Labels or Notes).

8. When finished, click **OK**.
   Result: *Your changes are applied to all selected menu items and a confirmation message appears.*
   Note: *Depending on the number of changes/items, this could take a few minutes.*

9. Click **OK** to close the confirmation message window.

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