caterease
catering + event planning solution

Training Guide

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Booking Your First Event

Table of Contents

Unit 1: Introducing Caterease - General Concepts

In this section, you will learn about general Caterease concepts:

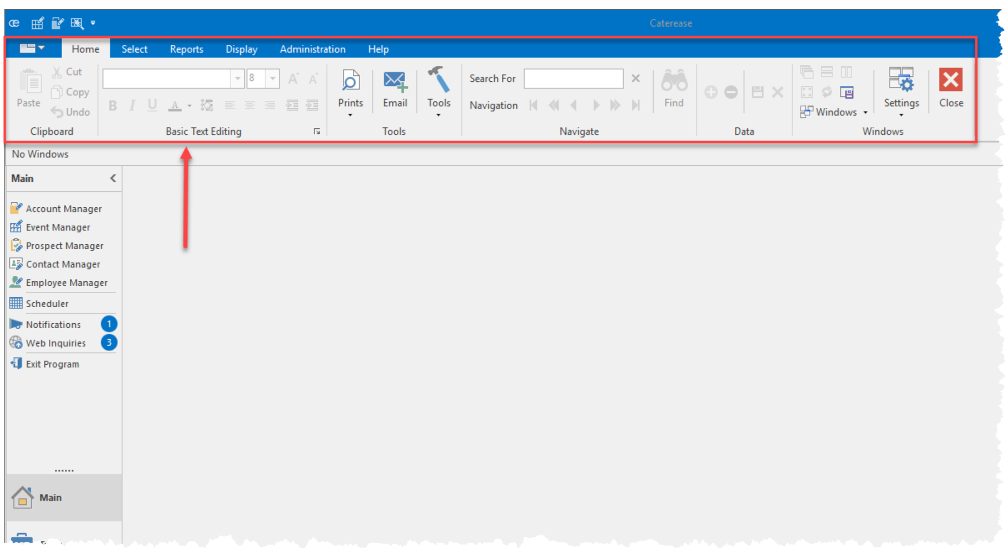
Exploring the Ribbon Tab and Navigation Pane
Using Data-Entry Tools: Quickpicks, Calendar, Calculator
Overview of the Event Manager Display and Sub-Event Display
Adding and Deleting Records
Selecting Records from Established Lists
Showing Details with the Magnifying Glass
Saving or Canceling Changes

Exploring the Ribbon Tab and Navigation Pane

Caterease is designed to look and act like programs you use every day. In addition to common Windows standards, such as right-click pop-up menus, drag-and-drop features and other tools, Caterease uses familiar Ribbon Tabs and Navigation Panes to keep your learning curve small and get you up and running quickly.

Ribbon Tab

The Ribbon Tabs are located across the top of your screen, and offer important tools for use throughout your program:



- **Home Ribbon Tab**
  Offers such tools as font formatting, navigation, and a context-sensitive list of tools.

- **Select Ribbon Tab**
  Offers an additional way to access various areas of the program.

- **Reports Ribbon Tab**
  Offers access to quick-access reports to track various information.

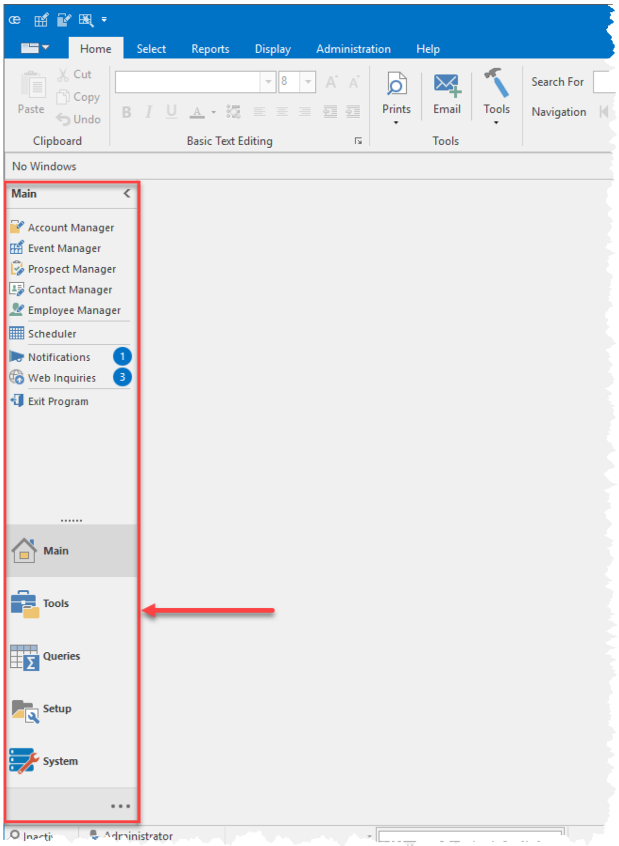
- **Display Ribbon Tab**
  Allows you to make certain changes to the program's display.

- **Administration Ribbon Tab**
  Offers access to program setup options.

- **Help Ribbon Tab**
  Offers access to the program's online help menu, video tips, and other assistance.

Navigation Pane/Sidebar

The Navigation Pane, or Sidebar, is a vertical bar that is displayed on the left-hand side of your desktop, and contains "hot buttons" which provide easy access to frequently used tools.



- **Main Sidebar**
  Offers access to the program's Managers.

- **Tools Sidebar**
  Offers the popular Event Wizard and other handy tools.

- **Queries Sidebar**
  Allows you to build custom queries to track any information you would like to see.

- **Setup Sidebar**
  Offers access to various setup features in the program.

- **System Sidebar**
  Allows you to manage deleted records, archive events, and more.

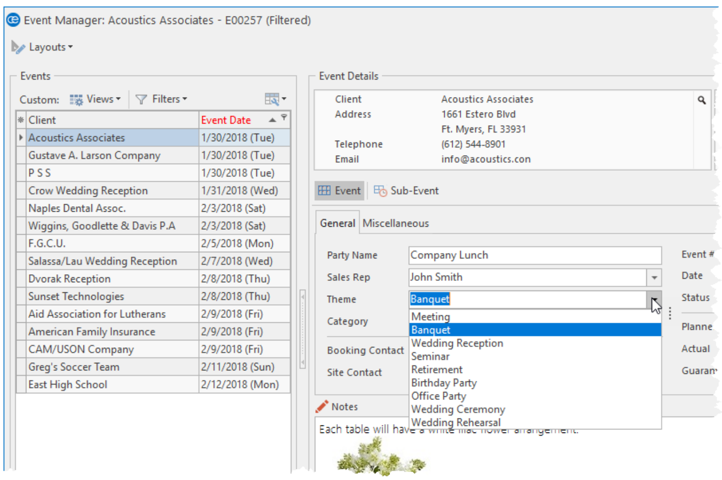
Using Data Entry Tools

Throughout the program there are many data-entry tools to make entering information easier and to help you avoid any repetitive typing.

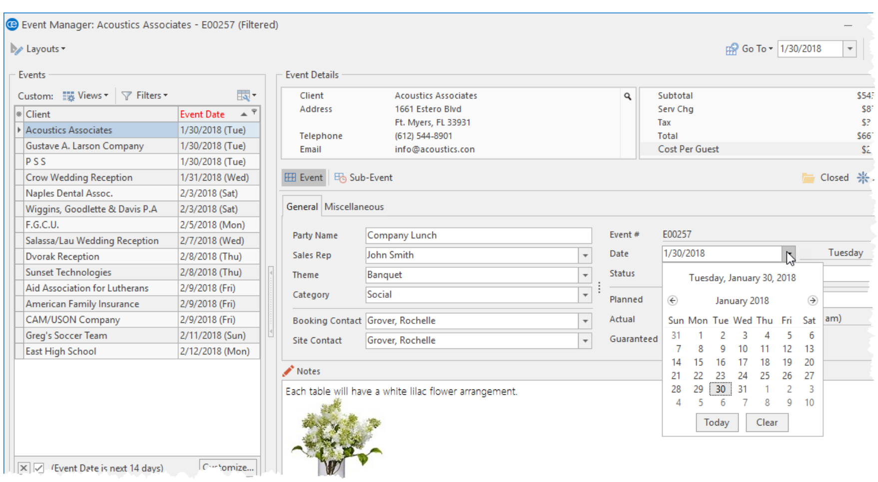
Data can be entered in several different ways:

- **Type and Hit [Enter]**
  Type into any field and press your **[Enter]** or **[Tab]** key to move from field to field.

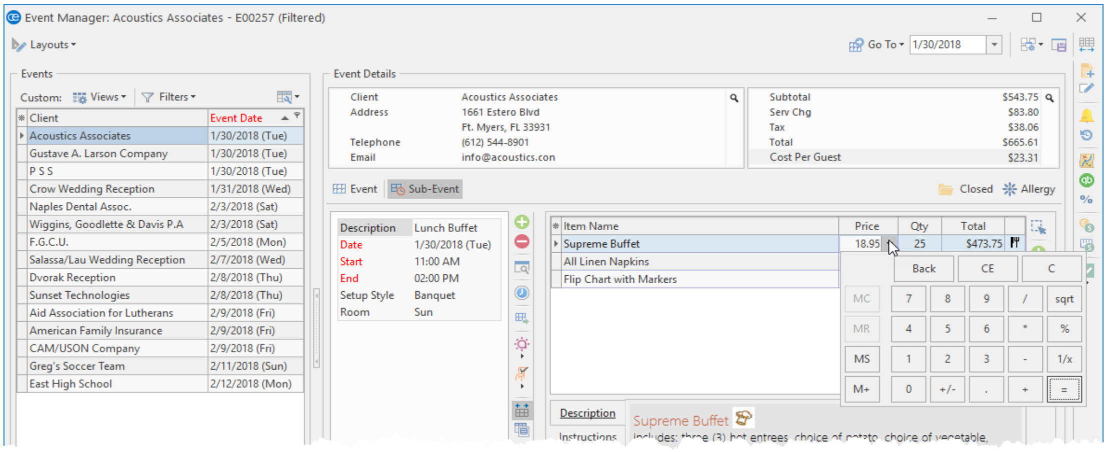
- **Custom Quickpick Lists**
  Click the down arrow next to various text fields to choose from customizable drop-down lists of options.



- **Drop-Down Calendars**
  Click the down arrow next to any Date field to access a drop-down calendar.



- **Drop-Down Calculators**
  Click the down arrow next to any currency-related field to access a drop-down calculator.



Adding and Deleting Records

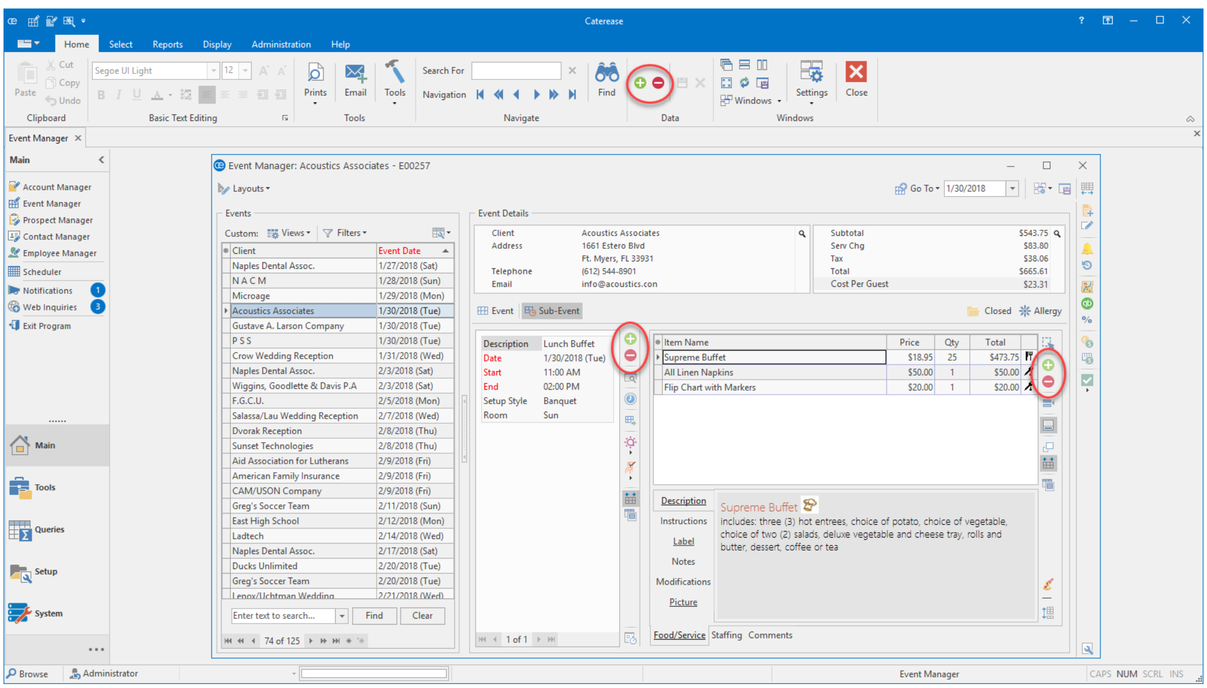
Caterease keeps your learning curve small by keeping all buttons very consistent. The two most common features - adding and deleting records - can be done quickly with two prominent buttons.

Adding Records

Anytime you want to add anything new in the program you will click a "green plus sign" button. Located in numerous places throughout the program, the **Add Record** button lets you add events, add clients, add custom menu items, and more.

Deleting Records

Anytime you want to delete anything in the program, you will click a "red minus sign" button. The **Delete Record** button is located throughout the program, and allows you to delete events, delete clients, delete menu items, and more.

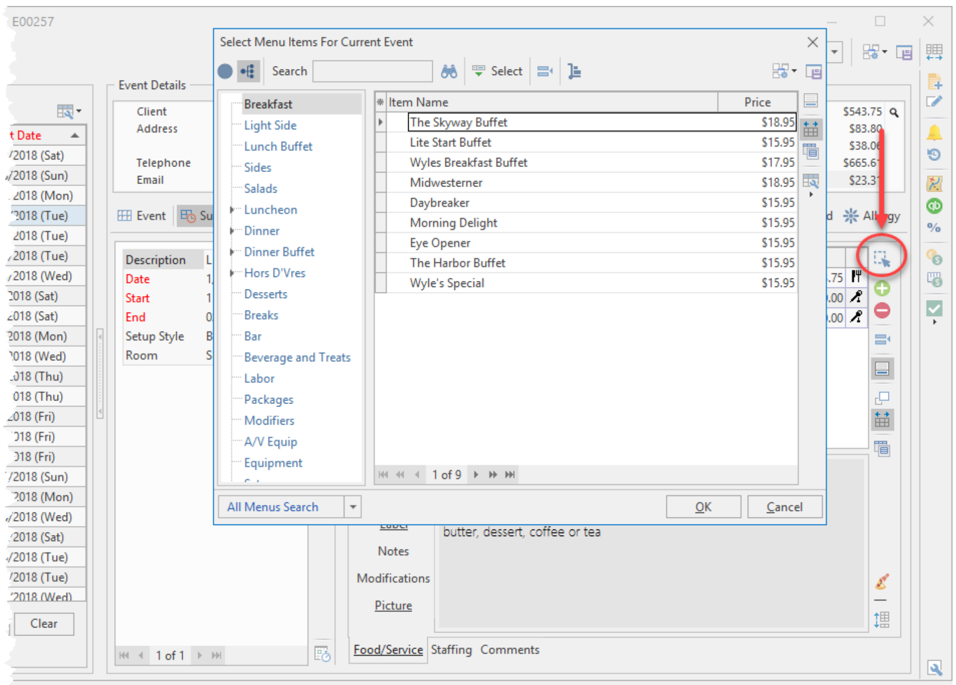


Selecting Records from Pre-Set Lists

With Caterease, ***you should never have to type the same thing more than once***. You can create default lists of information, such as default menus, default site locations, default tax rates, default checklists, timelines and more, and then select from those lists using the Selection tool (a button with a mouse cursor on it).

Selection Tool

Click the **Select** button throughout the program to select menu items, employees, site locations, tax rates, and more from default lists.



Saving or Canceling Changes

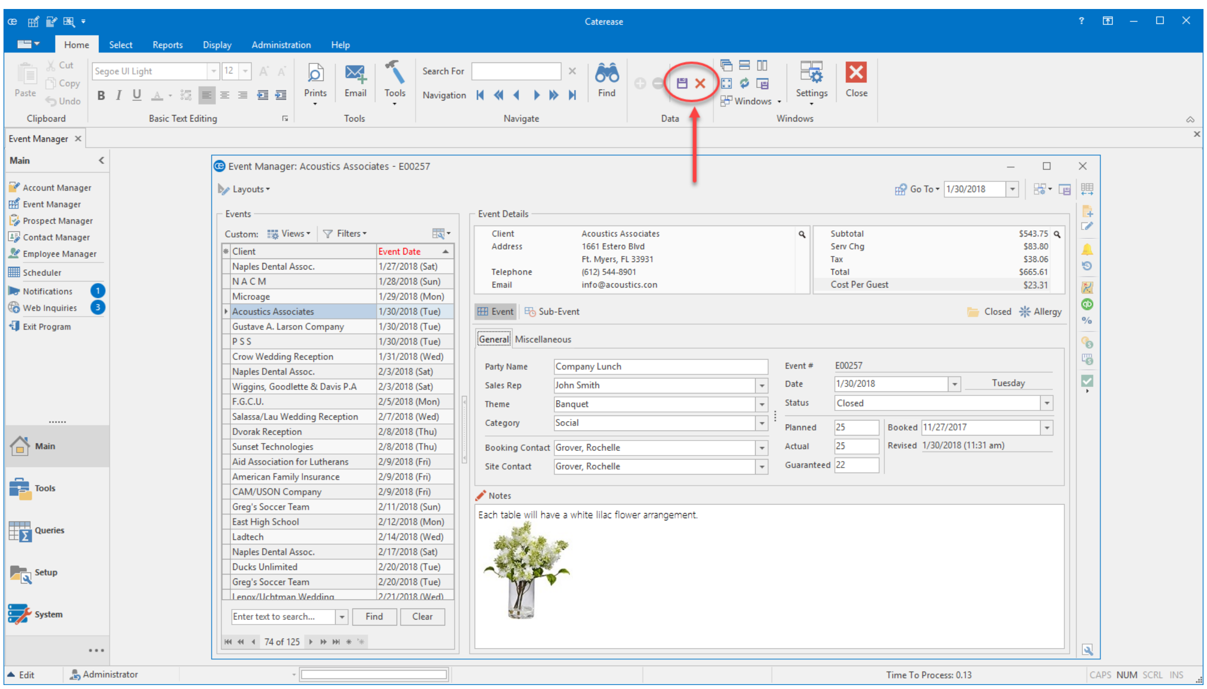
Saving or canceling any changes you make throughout the program can be done easily using the following buttons: the Save Changes button or the Cancel Changes button, respectively. For the program's various Managers (Event Manager, Account Manager, etc.), these buttons can be found in the Home ribbon tab at the top of your screen. In other areas of the program, they can often be found at the top of a particular window.

Save Changes

Click the **Save Changes** button (diskette) to save any recent changes. If this button is currently disabled, there have been no changes since your last save.

Cancel Changes

Click the **Cancel Changes** button (red X) to cancel recent changes and have the record you're working on revert back to its previously saved state. If this button is currently disabled, no changes have been made since your last save.

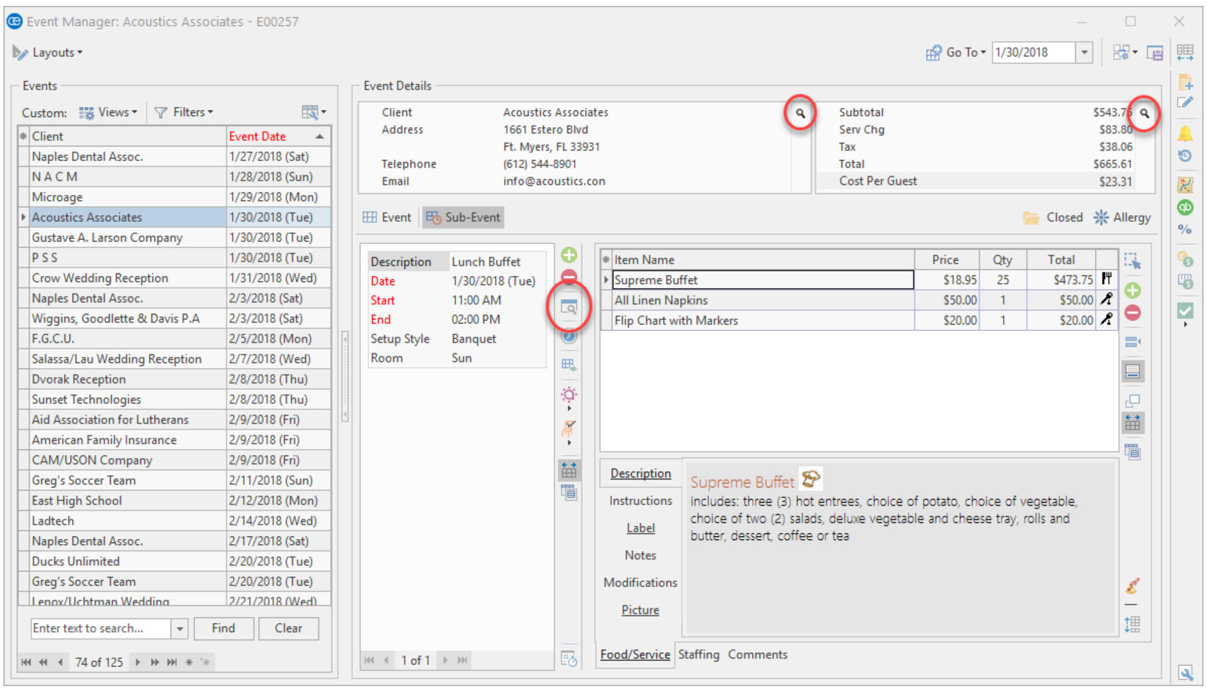


Showing Details Using the Magnifying Glass

Another button consistently used throughout the program is the "magnifying glass" button, or Show Details button, which allows you to view additional details of different records, such as sub-events, contact people, and more.

Show Details Button

Click the **Show Details** button anywhere in the program to view additional/extended details of a particular record in a separate pop-up window.



Unit 2: Booking a New Event with the Event Wizard

In this section, you will learn:

Selecting a Client and Contact Person for the New Event
Entering Basic Event Details
Selecting Menu Items for the New Event
Emailing an Event Print

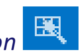
Event Wizard, Step 1: Selecting a Client

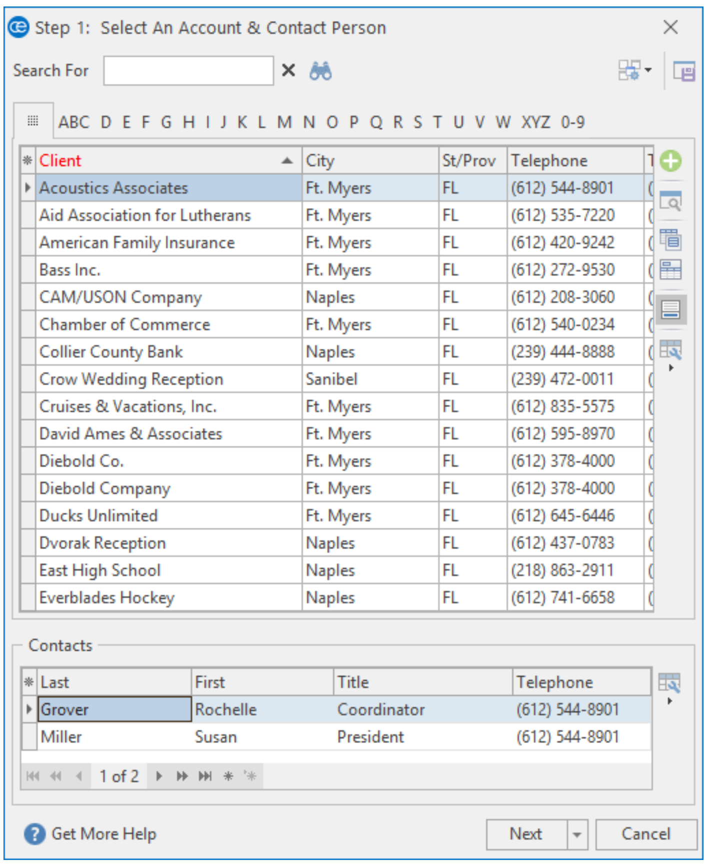
When booking an event using the Event Wizard, the first step is to choose the customer (or add the customer). You can quickly search through your existing customers by name, or you can use a Finder tool to search based on any client detail. Or, when necessary, you can add a brand-new client.

Searching for an Existing Client by Name

1. Click the **Tools** sidebar group, located on the left-hand side of your screen.

2. Click the **Event Wizard** button.
   Result: *The Event Wizard tool opens on the Step 1: Select An Account & Contact Person window.*

   Note: *You can also access the **Event Wizard** button*  *from the upper left-hand corner of your screen or from the **Select** ribbon tab.*



3. Click into the Search For field at the top left of the window and begin typing the name of your desired account.
   Result: *You are scrolled to a match as you type.*
   Note: *You can use the Account Finder tool (binoculars) to search for clients by any detail, or choose to add a new client. See topics below.*

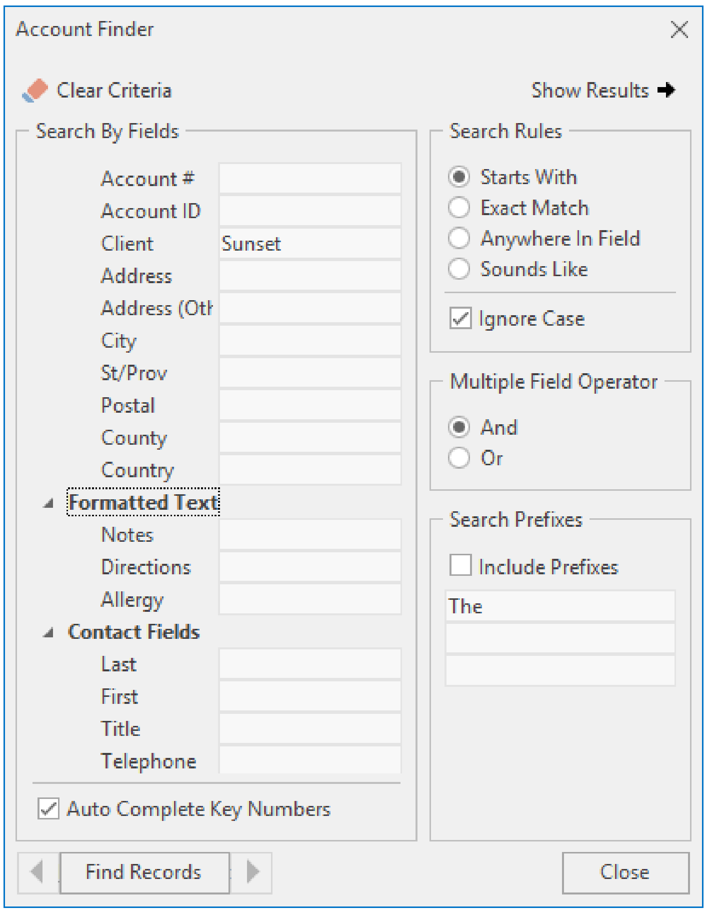
4. **[Optional]** Select a default contact person for the new event from the list of options in the **Contacts** pane at the bottom of the window.

5. When finished, click **Next** at the bottom right of the Wizard tool to move to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

Tip: *Click the down arrow to the right of the Next button to access any custom Wizards that have been created.*

Using the Account Finder Tool

1. Click the **Search Records** button  , located at the top of the Step 1: Select An Account & Contact Person window.
   Result: *The Account Finder window opens.*



2. In the **Search By Fields** area, type the text you would like to search for.
   Note: *You may search by more than one field.*

3. In the **Search Rules** area, select the appropriate rule.
   Note: *Confirm that* ***Ignore Case*** *is selected if you want to ignore capitalization when you enter your text.*

- **Starts With** - The field you chose in the **Search By Fields** area starts with the words or letters you typed.
- **Exact Match** - The field you chose in the **Search By Fields** area contains exactly the words you typed (and nothing else).
- **Anywhere in Field** - The words or letters you typed appear anywhere in the field you chose in the **Search By Fields** area.
- **Sounds Like** - The words or letters you typed match phonetically to the words in the field you chose in the **Search By Fieds** area.

4. **[Optional]** Click the radio button next to **And** or **Or**, within the **Multiple Field Operator** section, if you are searching by multiple search criteria.

5. **[Optional]** Click into the **Include Prefixes** checkbox and then type the prefix (A, An, The) into the fields within the **Search Prefixes** section if you would like to include prefixes in your search.

6. Click the **Find Records** button, located at the bottom left-hand side of the window.

7. **[Optional]** Click the **Show Results/Hide Results** button (arrow) at the top right of the Account Finder window to display a list of all records your search has retrieved thus far.
   Note: *Click once on a "found record" in the list to move to that account; double-click a record to move to it AND close the Finder tool down.*

8. **[Optional**] If you accidentally skip over the record you want, click the arrows on either side of the **Find Records** button to move forward or backward.

9. Once your record is located, click **Close**.
   Result*: The Finder window closes and you are positioned on the record you sought.*

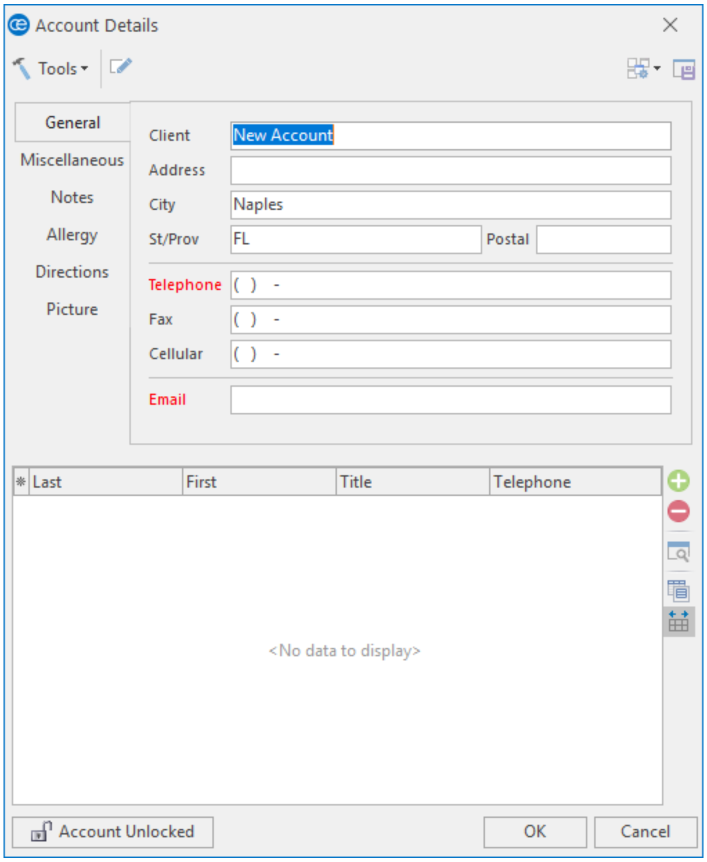
10. **[Optional]** Select a default contact person for the new event from the list of options in the Contacts pane at the bottom of the window.

11. Click **Next** at the bottom right of the Wizard tool to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

Adding A New Account for the New Event (Optional)

1. Click the **Add New Account** button  , located on the upper right-hand side of the Step 1: Select An Account & Contact Person window.
   Result: *A confirmation prompt appears.*

2. Click **Yes** to confirm.
   Result: *The Account Details window opens.*



3. Enter a name into the Clientfield, and press your **[Enter]** key.
   Result: *Your cursor moves to the next field.*

4. Fill in additional account information as desired by typing into each field and pressing **[Enter]** to move from field to field.
   Note: *Information on the **Miscellaneous** tab ("Category," "Reference," etc.), can be used to track this customer.*

5. **[Optional]** Click the **Add A New Contact** button  , located at the middle right of the window, to add a new contact person for your new client.

6. When finished entering details for the new client, click **OK** at the bottom of the Account Details window.
   Result: *You are taken back to the account selection screen, with the new account you added highlighted.*

7. Click **Next** at the bottom right of the Wizard tool to move to move to the next window, Step 2 of your default Wizard, or click the down arrow to the right of the button to select from one of your custom Wizards.

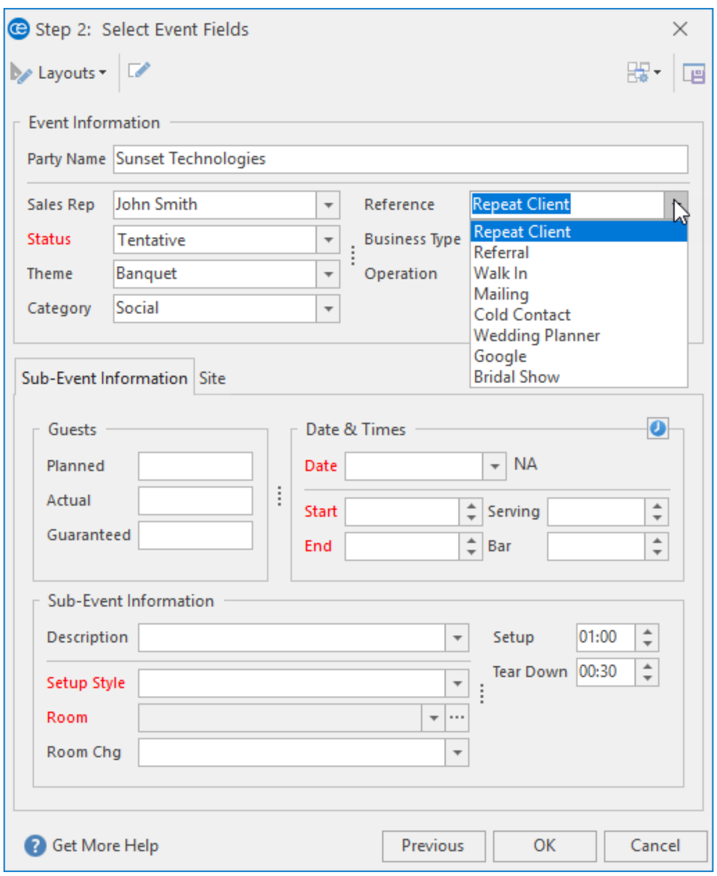
Event Wizard, Step 2: Entering Event Details

The second step of the Event Wizard has you filling out the basic details of your new event. This entire window can be customized to suit your preferences, with fields being added, removed, or rearranged. You can even create multiple custom Wizards for each type of event you book at your company.

Entering General Details

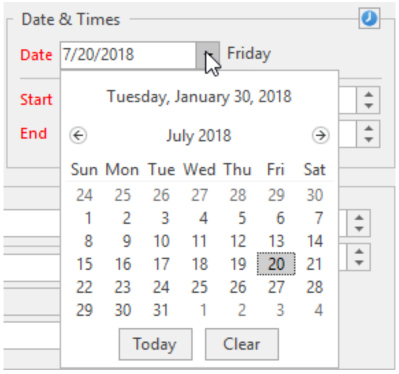
1. Enter Event and Sub-Event details into simple text fields such as Party Name, guest fields, etc., by simply typing into the fields as desired.
   Note: *The Party Name can be set to default as the name of the client, and the Guaranteed guest field can be set to default to a certain percentage of the Planned number via the* ***Managers*** *tab in your Global Settings.*

2. Click the down arrow to the right of various fields to use available drop-down lists ("quickpicks"), when applicable.
   Note: *You can customize quickpick lists to suit your needs, and you can optionally assign default values for these fields.*



3. Enter an event date by either typing into the Date field or by accessing the drop-down calendar to make a selection.
   Note: *Professional version users can enter words such as "Tomorrow," "Monday," or even "EOM" ("End*

of Month") or "EOM+1" in lieu of dates.



Entering Times for the New Event

> ***Tip:*** *The time and banquet room details you are adding here are for the first sub-event (or meal) of your new party. If the party will have multiple sub-events, you can create additional ones once the Wizard brings you into Event Manager.*

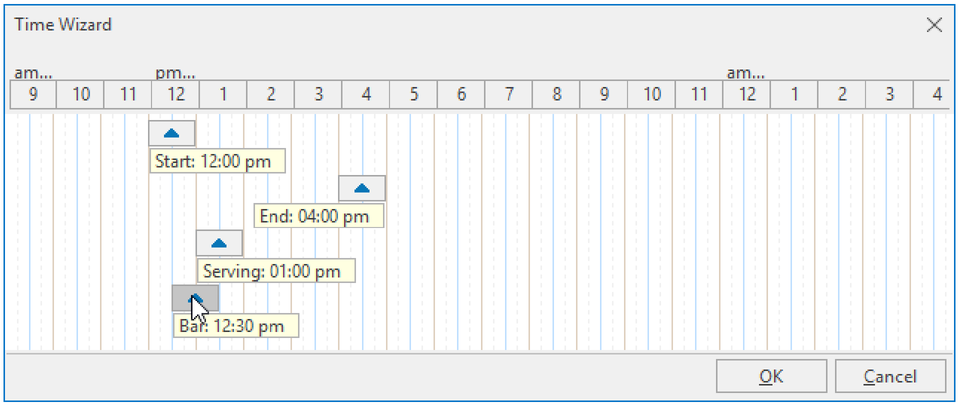
Entering Times by Hand

Enter times manually in the following formats:

- As a normal number for AM hours - that is, type "9" for 9:00 AM, "11" for 11:00 AM, etc.
- As a four-digit number for any other times - that is, type "0930" for 9:30 AM or "0930" and a "P" for 9:30 PM.
- Click in the hours, minutes, or AM/PM area of the time field and use the up-and-down arrows at the right of the field to make changes.

Entering Times Using the Time Wizard

1. Click the **Time Wizard** button .
2. Hold your left mouse button down on one of the time-setting bars and drag to the left or right.
   Result: *The time-setting bar moves with your mouse pointer.*



3. Release the mouse button when the time is set as you want it.
   Note: *To remove a time that has been set, click the time-setting bar with your right mouse button.*

4. Click **OK** when finished.
   Result: *The times are entered into the corresponding fields in your Event Wizard.*
   Note: *Time field names can be customized.*

Important Note: Setup and Tear Down time fields are entered as hours and minutes, not as actual times. The total time of a party will be calculated as its "Start" time minus any "Setup," until its "End" time plus any "Tear Down."

Entering Room Information

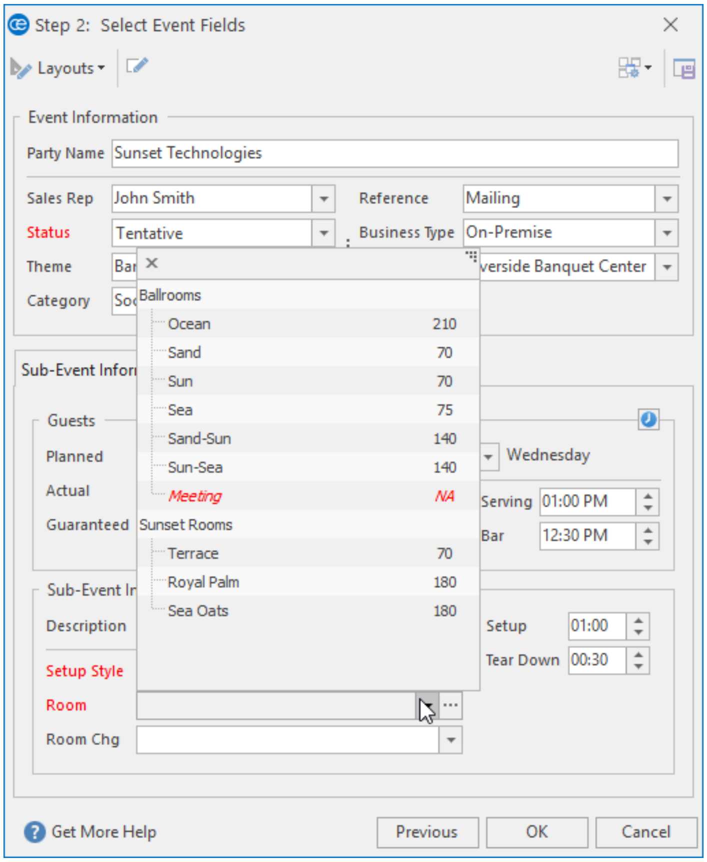
Tip: *If a room is not available, you can place a party on a "wait list." Once the venue becomes available, you will be notified of parties waiting.*

1. In the Event Wizard, fill out guest, date, and time information as described above.
   Note: *Caterease automatically tracks room availability based on date, time, and guest count; it is therefore best to enter that information prior to choosing a room.*

2. Click the down arrow to the right of the Setup Style field, and select a setup style from the corresponding quickpick list.

3. Click into the Room field.

4. Click the down arrow located at the right of the Room field, and select a room from the corresponding list.
   Result: *Your selection is entered in the field, and an associated room charge may default in the next field (depending on your setup).*
   Note: *The number to the right of each room name in the drop-down list indicates the maximum capacity of guests in that room for the setup style you selected in Step 2, as per your program's setup. N/A indicates that the selected setup style is not recognized for that room.*



5. **[Optional]** Click into the Room Charge field and enter a room charge, or simply accept the default.
   Note: *Default room charges are established in your program's setup.*

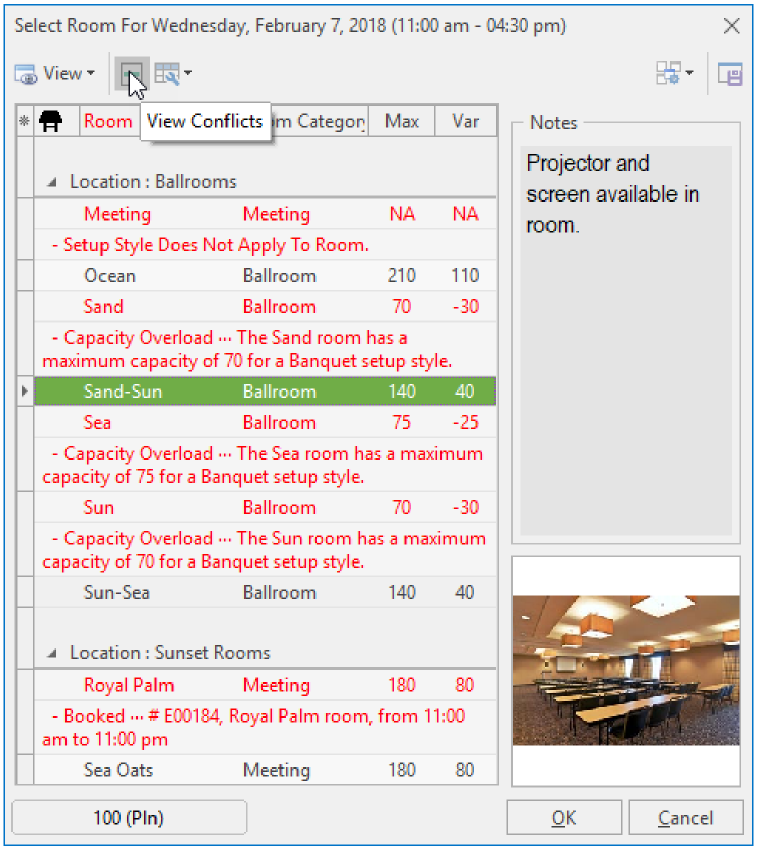
6. **[Optional]** Click into the Setup or Tear Down fields and enter the amount of time needed to set up or tear down the room.
   Note: *Setup and tear-down times are not entered as times of day, but rather as the number of minutes or hours required to set up or tear down the room.*

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

Using the Room Selection Wizard

1. In the Event Wizard, fill out guest, date, time, and setup style information as described above.
   Note: *The Rooms Selection Wizard automatically uses this information to select the most appropriate room for an event; it is therefore best to enter these details first.*

2. Click the **Room Selection Wizard** button (ellipsis), at the right of the Room field.
   Result: *The Select Room window opens, with the best-matching room for your sub-event highlighted in green, and rooms with conflicts (double-booking, capacity) noted with red font.*



3. **[Optional]** Click the **View Conflicts** button  to review specific room conflicts (indicated by red font).

4. **[Optional]** Select another room if you do not want to accept the recommended one.

5. **[Optional]** Click **Settings** > **Conflict Settings** to optionally have the Wizard ignore booking conflicts or capacity conflicts. This button is located on the upper right-hand side of the window.
   Note: *You can also choose* ***Settings*** *>* ***Allow Selection Of Unavailable Rooms*** *to be able to choose rooms in the Wizard despite conflicts.*

6. Click **OK** at the bottom of the Select Room window to accept the selected room.
   Result: *The selected room and its details (Room Charge, etc.) auto-populate into the Sub-Event display.*

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

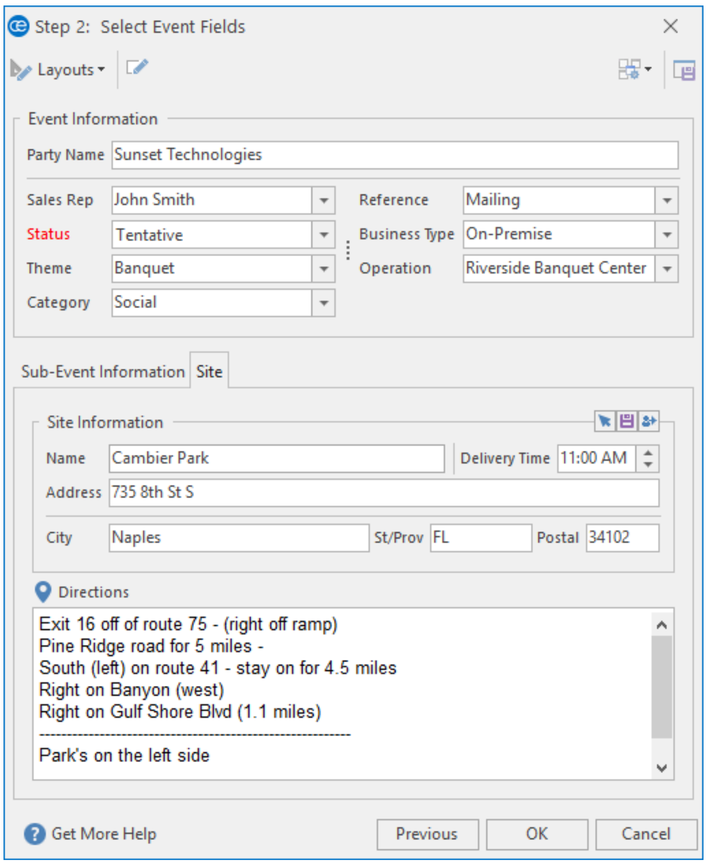
Entering Off-Premise Site Information

> ***Tip:*** *Once you've typed all the details of a site location and its directions, you can quickly add it to your database of commonly-used site locations (for future use) by simply clicking* ***Tools*** *>* ***Site Location*** *>* ***Add To Site Locations Database*** *at the top of the Sub-Event window.*

1. In the Event Wizard, click the **Site** tab.
   Result: *The* ***Site*** *tab and its information are displayed.*
   Note: *Site location fields are generally displayed on this tab, but they can easily be moved anywhere in the window.You can have this information default for you based on the client you chose for the event.*

2. Click into the Site Name field and type a site location name as desired.
   Note: *You can also select commonly used site locations from your Site Location Database (see topic below).*

3. Press the **[Enter]** key on your keyboard.
   Result: *Your cursor moves to the next field.*



4. Type an address, city, state, postal code, and optionally enter a Delivery Time, pressing **[Enter]** after each one to move from field to field.

5. **[Optional]** Click into the **Directions** text box at the bottom of the window and type directions to the location as desired.
   Note: *Format text on this tab by highlighting the text, right-clicking, and choosing* ***Font****.*

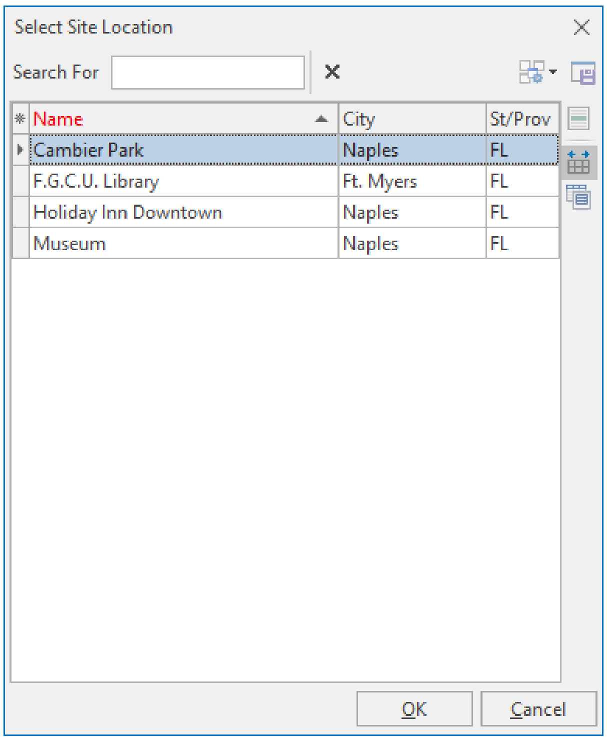
6. When finished, click **OK** to save your changes and close the window.

Selecting Locations from the Site Location Database

> ***Tip:*** *You can enter site location information directly into the window and copy it to this Site Locations Database (see topic above), or add locations to the database itself.*

1. Click the **Site** tab on the Sub-Event window.
   Result: *The* ***Site*** *tab and its information are displayed.*
   Note: *Site location fields are generally displayed on this tab, but can be moved anywhere in the window. You can have this information default for you based on the client you chose for the event.*

2. Click the **Select Site Location** button, located at the top right of the **Site** tab.
   Result: *The Select Site Location window opens.*



3. Locate the site location you want by typing its name in the **Search For** box at the top of the window.
   Note: *As a default, your list of locations is sorted by "Name." You can sort by another column on this window ("City," "St/Prov") and search by that detail.*

4. Select the location (if not already selected) and click **OK**.
   Result: *The site location and its directions will be retrieved into the Event Wizard.*

> **Note**: Remember, you should never have to type the same thing more than once. When entering a new site location, click the **Save Site Location** button (diskette) to save the details. You can also click the **Copy Site Location from Client** button, located to the right of the **Save Site Location** button, to copy the client address into the Site address.

Event Wizard, Step 3: Entering Menu Details

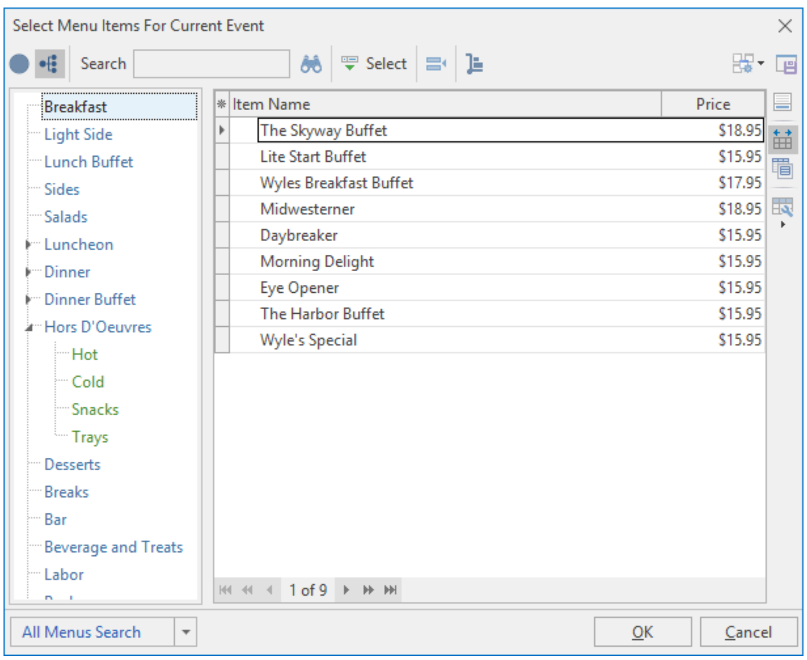
Once you have entered basic event information into the Event Wizard, Caterease creates your new event and opens it in Event Manager. It then asks if you'd like to select menu items for the party. The steps below walk you through the menu-selection process.

Selecting Menu Items for the New Event

1. After completing Step 2 of the Event Wizard, click **Yes** on the informational message which prompts you to select your menu items for your new event.
   Result: *The Select Menu Items For Current Event window opens.*

   Note: *If the message is no longer visible, click the* ***Select Menus*** *button*  *, located on the right-hand side of the* ***Sub-Event*** *display, on the* ***Food/Service*** *tab.*

2. Click on a menu title in the left pane of the Select Menu Items For Current Event window.
   Result: *Items in the selected menu are displayed in the main (right-hand) pane of the window.*



3. Highlight the food/service items you want to add to your event, and retrieve them in one of the following ways:

   - Double-click on a single item in the Select Menu Items For Current Event window.
     Result: *The selected item is inserted at the bottom of your event's* ***Food/Service*** *grid, and the Select Menu Items For Current Event window remains open.*

   - Hold your left mouse button down on a group of selected items and drag and drop them onto the **Food/Service** grid.
     Result: *The selected items are inserted at the bottom of your event's* ***Food/Service*** *grid, and the*

Select Menu Items For Current Event window remains open.
Note: *Select a group of items by dragging your mouse over them or by holding the* ***[Shift]*** *or* ***[Ctrl]*** *key down on your keyboard as you click.*

- Click the **Select** button at the top left of the Select Menu Items For Current Event window.
  Result: *Any highlighted menu items are inserted at the bottom of your event's* ***Food/Service*** *grid, and the Select Menu Items For Current Event window remains open.*

- Click **OK**.
  Result: *Any highlighted menu items are inserted at the bottom of your event's* ***Food/Service*** *grid, and the Select Menu Items For Current Event window closes.*

- Click the **Insert Mode** button to retrieve a menu item in a specific position on the **Food/Service** grid of your event.
  Result: *Once clicked, the feature is enabled, and all subsequently selected menu items are automatically placed above the currently highlighted item on the* ***Food/Service*** *grid (rather than always at the bottom); when dragging and dropping,* ***Insert Mode*** *allows items to be dropped anywhere at all on the* ***Food/Service*** *grid.*
  Note: *Items can also be dragged and dropped up and down in the menu on the event's* ***Food/Service*** *grid, as well, regardless of the* ***Insert Mode*** *feature.* ***Insert Mode*** *can be enabled as a default by clicking it once and then clicking the* ***Save Window Settings*** *button .*

Important Note: As a quick way to locate menu items, click in the "All Menus Search" tool at the bottom left of the Menu Selection window and begin typing the name or partial name of the item. The selection tool will search for those letters throughout your default menus. Simply select any match to go directly to that menu item.

E-mailing an Event Print

You can quickly e-mail a print directly from any Print Preview screen.

E-mailing an Event Print

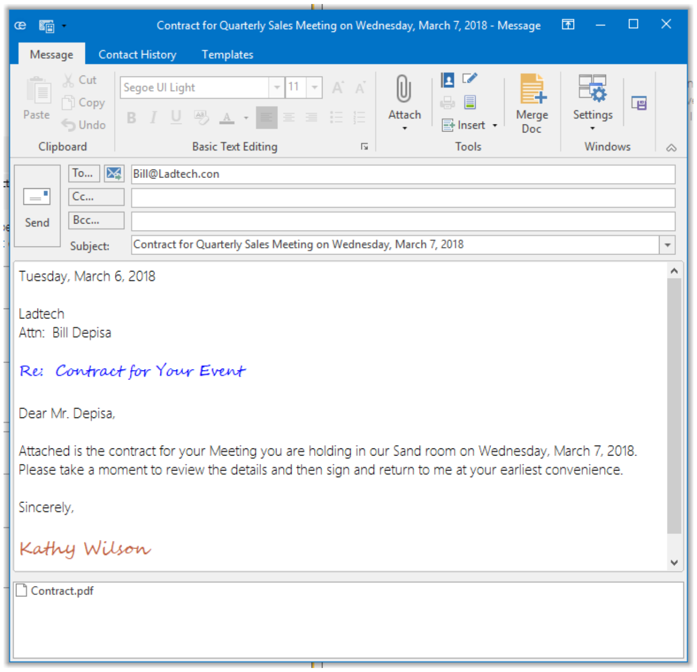
Tip: *E-mail from Caterease is automatically sent via your regular e-mail Outbox. Therefore, all return correspondence will be sent to your normal work e-mail address.*

1. From an event in Event Manager, click the **Home** ribbon tab, if it is not already selected, and then click the bottom half of the **Prints** button.
   Note: *The* ***Prints*** *button is a split button. (Click the top half to select prints from a floating window.)*

2. Choose from among **General**, **Event Contracts/Invoices**, or **Event Subprints**.

3. Click on the name of the desired print.
   Result: *A Print Preview screen displays.*

4. Click the **Email** button, located at the top of the Print Preview screen.
   Result: *Notice that the print is automatically attached as a PDF at the bottom of the e-mail window. You can change the format of this attachment by clicking on it with your right mouse button and selecting* ***Change Type To*** *and choosing a different type.*



5. The To field will automatically populate default e-mail addresses (although this feature can be disabled, if desired).

6. **[Optional]** Enter additional e-mail addresses into the Cc and Bcc fields, separating each address by semi-colons.

7. Type a subject for the e-mail into the Subject field, or click the down arrow at the right of the field to make a selection from the customizable quickpick list.
   Note: *This quickpick is customized in* ***Setup*** *>* ***Quickpicks*** *>* ***General*** *>* ***Email Subject****.*

8. Click into the large white text box of the e-mail window and type the body of your e-mail, or optionally insert a custom merge letter.

9. **[Optional]** Format the body of the e-mail by using the formatting tools at the top left of the window. Alternatively, highlight any text within the body of the e-mail, click your right mouse button, and choose **Font**.

10. When finished, click the **Send** button, located at the top left-hand side of the window, to send the e-mail.

Tip: *In both the Standard and Professional versions of Caterease, you can create e-mail templates that can be customized, to include print and/or file attachments.*

Unit 3: Managing General Event Information

In this section, you will learn:

Reviewing Event Manager Fields
Reviewing the Event Manager Display
Searching for Events
Customizing Quickpick Lists
Adding a New Sub-Event
Selecting Staff for an Event
Entering Special Requests or Comments

Reviewing Event Manager Fields

A multitude of fields are available to help you keep track of your events - and you can even make up additional fields (User-Defined Fields). These fields exist in Event Manager on either the Event or Sub-Event display. Below is a list:

Event Fields

Field	Description
Party Name	Used to identify an event; especially helpful when one client has multiple events.
Sales Rep	Shows the sales representative responsible for the event.
Theme	Allows you to track events by theme; (e.g. "Wedding Reception," "Christmas Party," "Seminar").
Reference	Lets you track your company's various marketing strategies; shows why the client booked this event (how they heard of you).
Category	Gives you an extra field for categorizing and tracking events; can be renamed to suit your specific business needs.
Booking/Site First	Identifies the first name of the booking and site contact people for the event; usually these names are directly associated with the client, and can be selected instead of repetitively typed.
Booking/Site Last	Identifies the last name of the booking and site contact people for the event.
Booking/Site Email	Identifies the booking/site contact's e-mail address.
Booking/Site Tel	Identifies the booking/site contact's telephone number.
Coordinator	Allows you to identify an event coordinator.
Primary Site Name	Identifies the first active sub-event's Site Location.
Primary Room	Identifies the first active sub-event's Room.
Event #	Offers a unique identifier for the event; this number is automatically assigned by the program.
Status	Indicates the status of the event: Prospective, Definite, Tentative, Cancelled, or Closed.
Cancel Type/Date	Lets you track why and when you lost business; available as sub-fields as the Status field.
Event Date	Indicates the date on which this event will (or did) take place.
Booked/Revised Date	Allows you to track the date on which this event was booked, and when it was last revised; available as sub-fields of the Event Date field.
Guests	Does not allow data-entry; displays the Actual guest count if one exists, and the Planned or Guaranteed count if one does not.
Planned	Indicates the number of guests the customer is planning for the event.
Actual	Indicates the actual number of guests who attended (or will be attending) the event.
Guaranteed	Indicates the minimum number of guests the customer is guaranteeing for the event; can be an automatic percentage of the Planned guest count.
Business Type*	Allows you to categorize events based on differing business models or if your company does business as more than one enterprise.
Subtotal	Identifies the subtotal for the entire event.
Gratuity	Identifies the total gratuity for the entire event.
Service Charge	Identifies the total service charge for the entire event.
Tax	Identifies the total tax for the event.
Total	Identifies the event total, including tax and service charge.
Cost	Identifies the total cost (to you) of the event; includes cumulative costs of menu items, as well as staffing and any miscellaneous cost adjustments.
Profit	Identifies the total profit for an event.
Paid	Identifies the total amount paid for an event.

Field	Description
Balance	Identifies the currently outstanding balance for the event.
Total Markup	Identifies the total markup of an event, automatically calculated by multiplying cost by a markup rate you identify.
Operation*	Allows you to separate events based on DBA's, or different businesses or locations you might be running.
Pay Method*	Identifies how the customer will pay (or paid) for the event.
Cancel Charge*	Indicates the amount the customer will be charged if the event is cancelled.
Members/Non-Members*	Used by private clubs to distinguish between guest types; can be renamed to suit your needs (e.g. "Adults," "Children").
PO Number*	Identifies a purchase order associated with the event.
Folio Number†	Identifies a folio number associated with the event.
Closed†	Lets you track a closed date for the event; optionally allows you to lock users out of closed events.
User Defined Fields†	Allows you to create any additional fields you want to suit the specific needs of your company.
* Displayed on Miscellaneous tab by default † Not displayed by default	

Sub-Event Fields

Field	Description
Description	Merges in the description of the event's first sub-event; e.g., "Dinner Buffet," "Meeting," "Breakfast," etc.
Type	Merges in the type of the event's first sub-event, e.g., "On Premise," Off Premise," etc.
Time: Start	Merges in the start time of the event's first sub-event.
Time: End	Merges in the end time of the event's first sub-event.
Time: Delivery	Merges in the delivery time of the event's first sub-event.
Time: Serving	Merges in the serving time of the event's first sub-event. *Note: You can rename this field in* ***Administration*** > ***General*** > ***Customize Names*** > ***Times***.
Time: Bar	Merges in the bar time of the event's first sub-event. *Note: You can rename this field in* ***Administration*** > ***General*** > ***Customize Names*** > ***Times***
Time: Arrival	Merges in the arrival time of the event's first sub-event. *Note: You can rename this field in* ***Administration*** > ***General*** > ***Customize Names*** > ***Times***
Time: Departure	Merges in the departure time of the event's first sub-event. *Note: You can rename this field in* ***Administration*** > ***General*** > ***Customize Names*** > ***Times.***
Time: NA	These two fields represent two extra time fields that you can make up yourself. They will each merge in the respective time information from the event's first sub-event.
Time: Staff In	Merges in the staff arrival time of the event's first sub-event. *Note: You can rename this field in* ***Administration*** > ***General*** > ***Customize Names*** > ***Times.***
Time: Setup	Merges in the setup time of the event's first sub-event. *Note: This field, which displays as Hours and Minutes (not as a time), is set up in* ***Administration*** > ***New Booking Defaults*** > ***Sub-Events.***
Time: Tear Down	Merges in the tear down time of the event's first sub-event. *Note: This field, which is set up in* ***Administration*** > ***New Booking Defaults*** > ***Sub-Events****, displays as Hours and Minutes, not as a time.*
Date	Merges in the date of the event's first sub-event.
Room	Merges in the name of the room of the event's first sub-event.
Room Chg	Merges in the room charge of the event's first sub-event.
Room Category	Merges in the room category of the event's first sub-event.
Setup Style	Merges in the setup style of the event's first sub-event.
Site Name	Merges in the name of the off-premise site location of the event's first sub-event.
Site Address	Merges in the address of the off-premise site location of the event's first sub-event.
Site City	Merges in the city of the off-premise site location of the event's first sub-event.
Site St/Prov	Merges in the state or province of the off-premise site location of the event's first sub-event.
Site Postal	Merges in the postal/ZIP code of the off-premise site location of the event's first sub-event.
Site Tele-	Merges in the telephone number of the off-premise site location of the event's first sub-event.

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

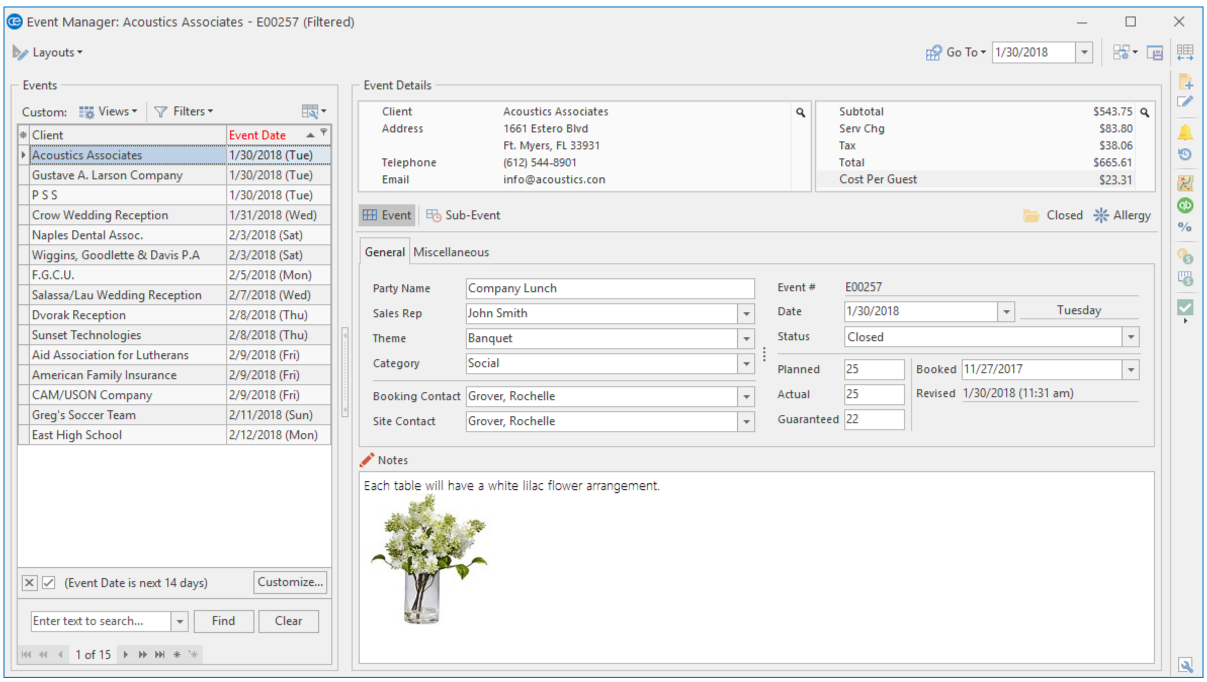
Introducing Event Manager

Event Manager is the heart of your Caterease program. Event Manager is where you manage all of your existing events, including editing details and generating prints for existing parties. New events can be added here as well, although most prefer to use the quick, easy Event Wizard tool when booking a new event.

This area of the program offers two different displays: Event display and Sub-Event display.

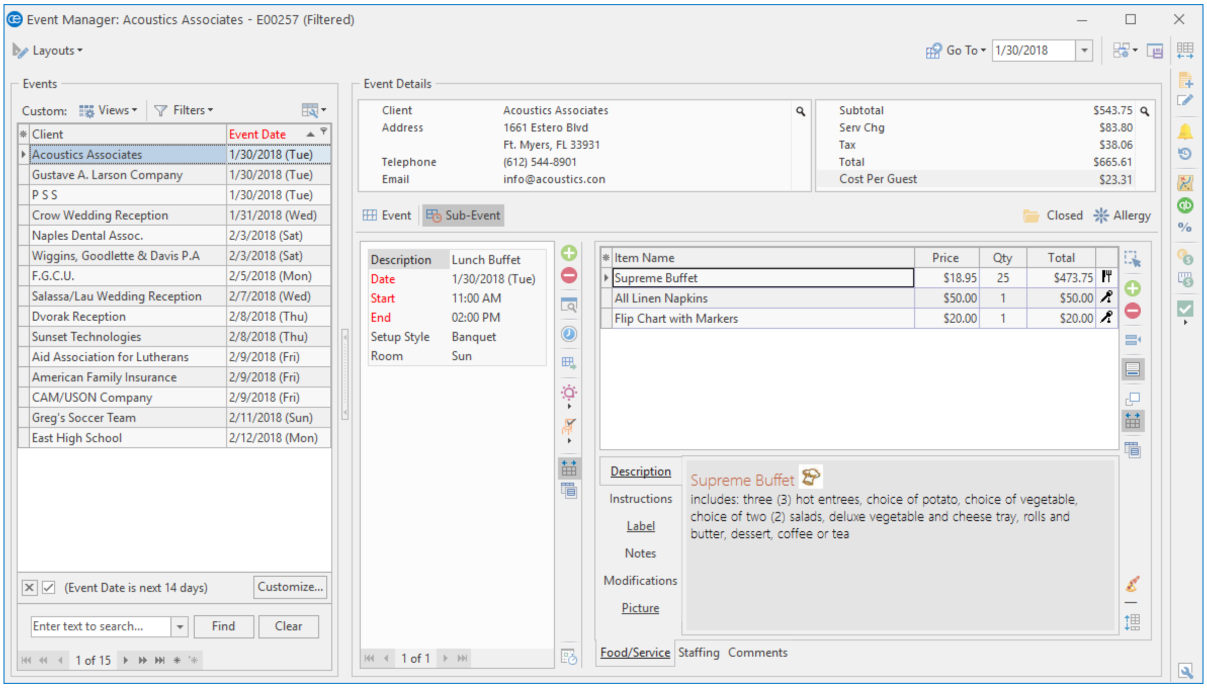
Event Display

The "Event" display shows the general details of an event, including its theme, reference, sales rep, date, guest count, and more. As with all areas in the program, this screen can be customized, in that fields can be added, removed, or rearranged.



Sub-Event Display

The "Sub-Event" display shows the specific meal information of an event (the menu, venue — whether off-premise or on-premise — and times). Although this area can be renamed, the concept of "sub-event" is meant to imply that you can break events down into more than one meal - for example, a "Breakfast," a "Lunch," and a "Dinner" - each with its own venue, menu, times, and even date.



Customizing Quickpick Lists

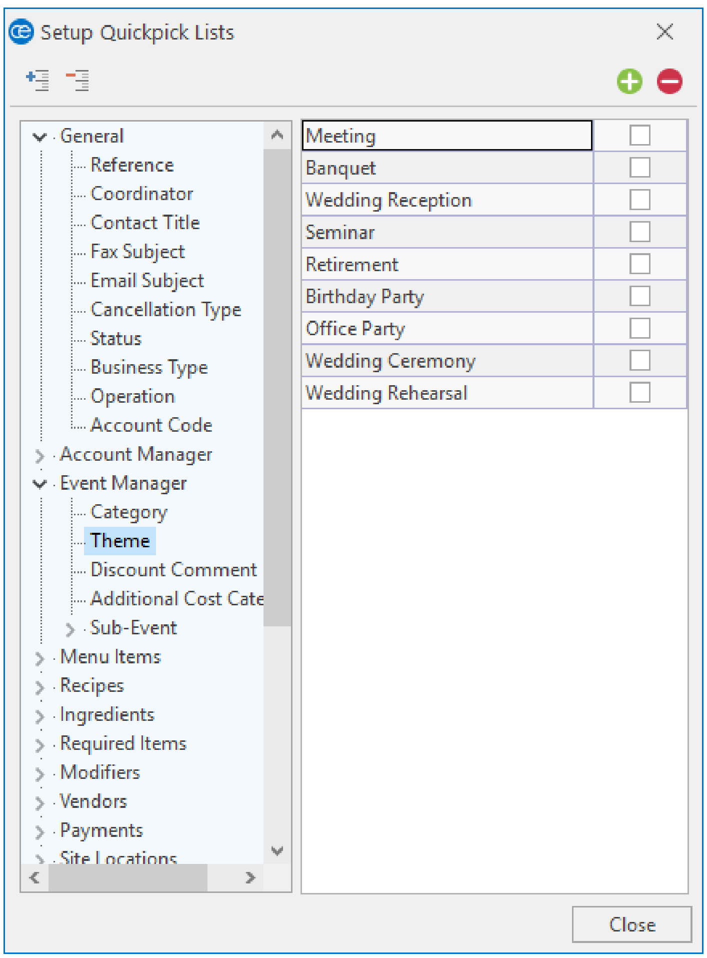
Throughout Caterease the majority of fields offer "quickpick lists" - drop-down lists of choices that you can select from to keep your data entry consistent. These lists are yours to create, and they can be edited as described below.

Note: Editing the list of "Sales Representatives" is done through System Security.

Editing Quickpick Lists

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

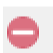
2. Click **Lists** > **Quickpicks**.
   Result: *The Setup Quickpick Lists window opens.*
   Note: *You can also click the* ***Quickpicks*** *button in the* ***Setup*** *group of the navigation pane (left-hand side of your screen).*



3. On the left-hand side of the Setup Quickpick Lists window, click the expand button to the left of any quickpick category to see the corresponding lists. Click the **Full Expand** button  to view all expanded categories.
   The "Room" list, available in the "Event Manager" category above (under "Sub-Event"), is only available if your company has NOT purchased banquet room tracking. This list allows you to create a custom quickpick list for the <u>*Room*</u> *field, but will not track or graph those rooms.*

4. Click on the desired quickpick list to select it.

5. **[Optional]** Click the **Add New Item** button  at the top right of the window to add a new item to the list.
   Note: *In certain lists (Business Type, Status, Event Category), you are able to apply a color to the item, so that you might color-code your Event Scheduler and various detail grids based on these lists. Simply click into the Color column next to each item and click the down arrow to select a new color, or click the browse button (ellipsis button) to set a custom color.*

6. **[Optional]** Click on an item to select it and either edit as desired, or click the **Delete Current Item** button  to remove the item from the list.

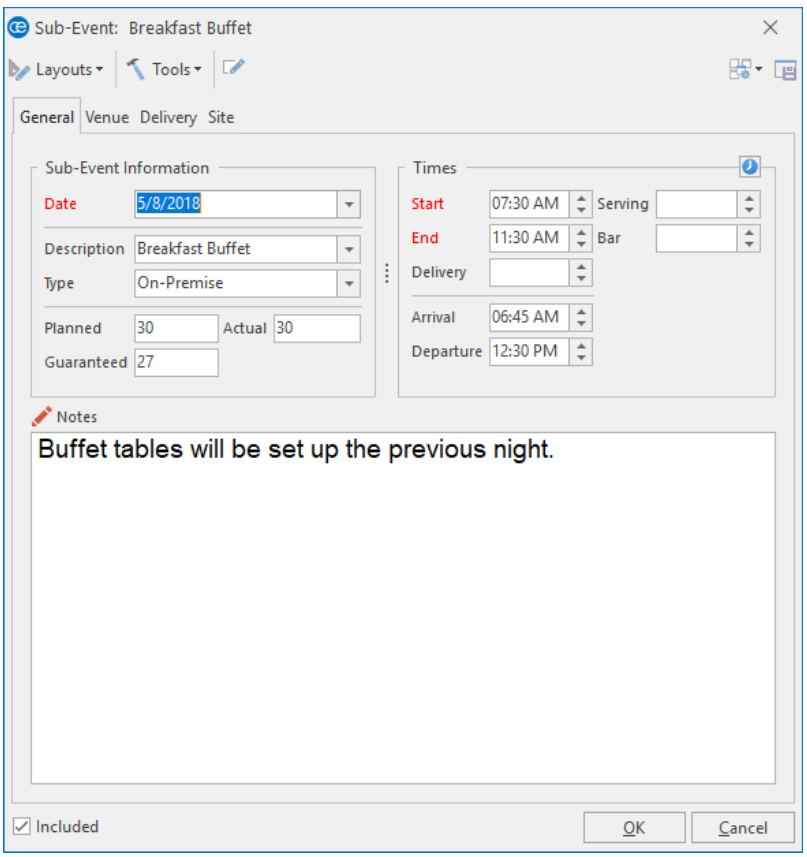
7. **[Optional]** Hold your left mouse button down on any item in the list and drag it up or down to reposition it.
   Note: *You cannot drag an item you are currently editing; click off of the item first and then click and hold your left mouse button over it again to drag and drop.*

Adding a Sub-Event

> ***Tip:*** *Leave the **Included** checkbox (bottom left of the Sub-Event window) selected, unless you decide you do not want to include this sub-event and its details (menu, venue, times, etc.), with this event (for example, if it was created as an optional proposal and is not to be included).*

1. Click the **Sub-Event** button, located next to the **Event** button on the left-hand side of your screen.
   Result: *The Event Manager changes to the Sub-Event Display.*

2. Click the **Add A New Sub-Event** button  , located on the Sub-Event pane, which is to the left of your **Food/Service** tab.
   Result: *The Sub-Event window opens, with the date and guest counts defaulting from your general event information.*
   Note: *As an alternative, hold your **[Shift]** key down simultaneously while clicking the above button. Doing so prevents a new sub-event window from popping up, and instead you can edit your new sub-event directly in the grid on the left-hand side of your screen.*



3. Click into the Description field and type a description for the sub-event, or select one from your custom quickpick list.
   Note: *Examples of sub-event descriptions might include "Breakfast," "Break," "Buffet," etc.*

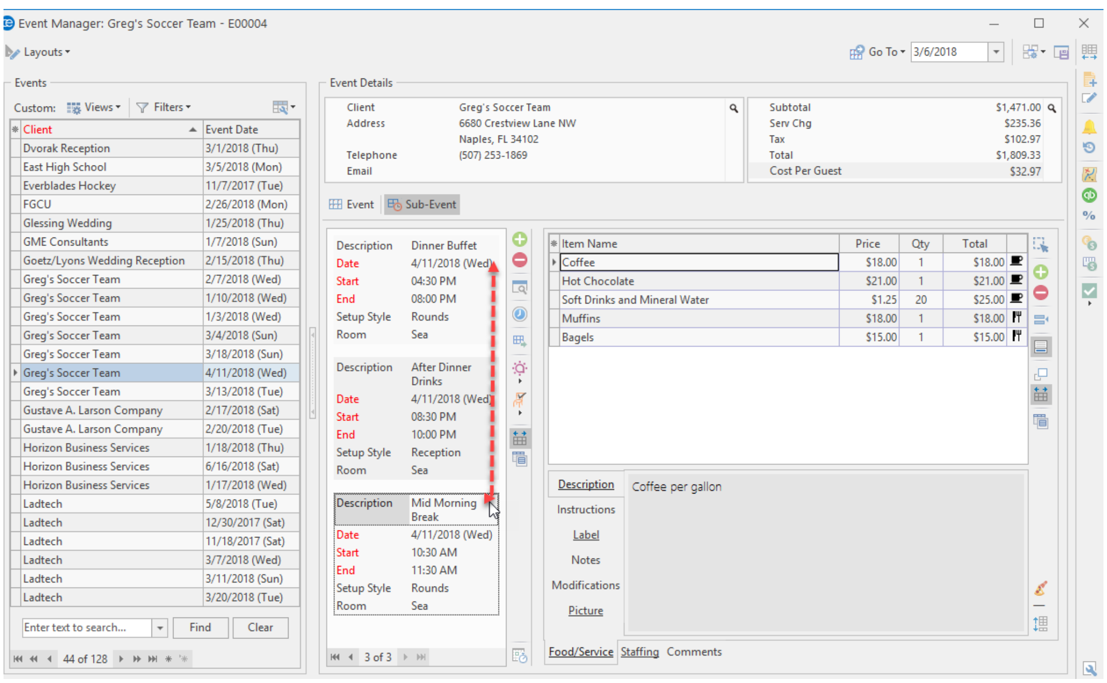
4. **[Optional]** Click into the Type field and enter a type for the sub-event, or select one from the custom quickpick list.
   Note: *This field can be used for tracking your sub-events. Examples might include "Off-Premise," "On-Premise," "Delivery," etc.*

5. Enter times by hand, using the formats below, or by using the Time Wizard tool:

   - As a normal number for AM hours - that is, type "9" for 9:00 AM, "11" for 11:00 AM, etc.
   - As a four-digit number for any other times - that is, type "0930" for 9:30 AM or "0930" and a "P" for 9:30 PM.
   - Click into the hours, minutes, or AM/PM area of the time field and use the up-and-down arrows at the right of the field to make changes.

6. **[Optional]** Enter banquet room details or off-premise information, depending on the venue of the party.

7. Optionally rearrange multiple sub-events by clicking on a sub-event, then dragging and dropping into the desired position.

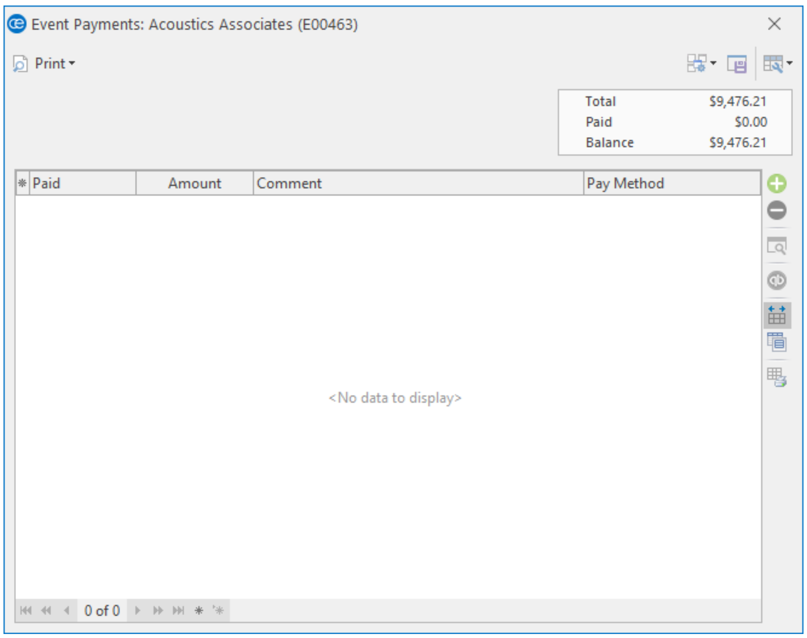


Adding a Payment

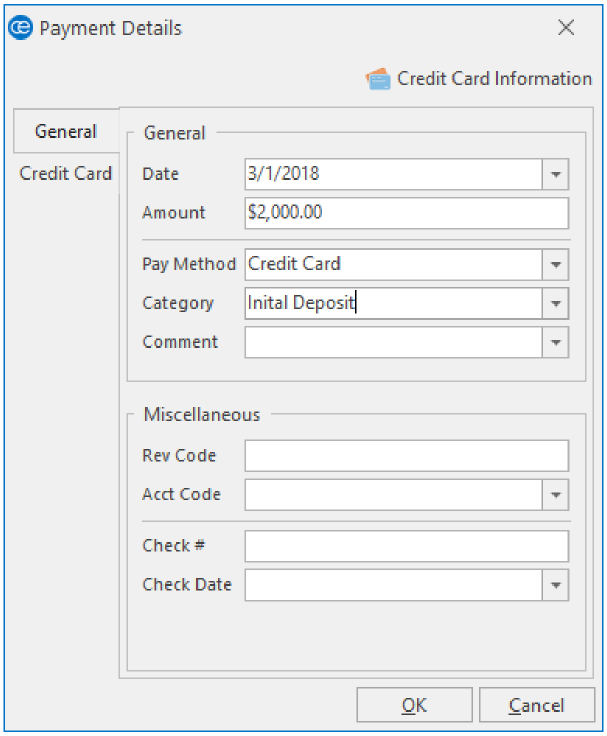
Adding a Payment for an Event

1. In Event Manager, retrieve the event for which you want to add a payment.

2. Click the **Payments Made** button , located in the toolbar on the upper right-hand side of the Event Manager, or from the **Tools** menu at the top of your screen, depending on your personal configuration.
   Result: *The Event Payments window opens.*



3. Click the **Add Payment** button , located on the right-hand side of the Event Payments window.
   Result: *The Payment Details window opens.*
   Note: *The current date defaults as the new payment date, but can easily be edited.*



4. Enter a dollar amount into the Amount field.
   Note: *Type a dollar amount into the field or click the down arrow to access the drop-down calculator.*

5. Select a Pay Method from the drop-down quickpick list, or accept the default. (You may also type directly into the field.)
   Note: *This information will default from the Payment Method of the event (if one exists).*

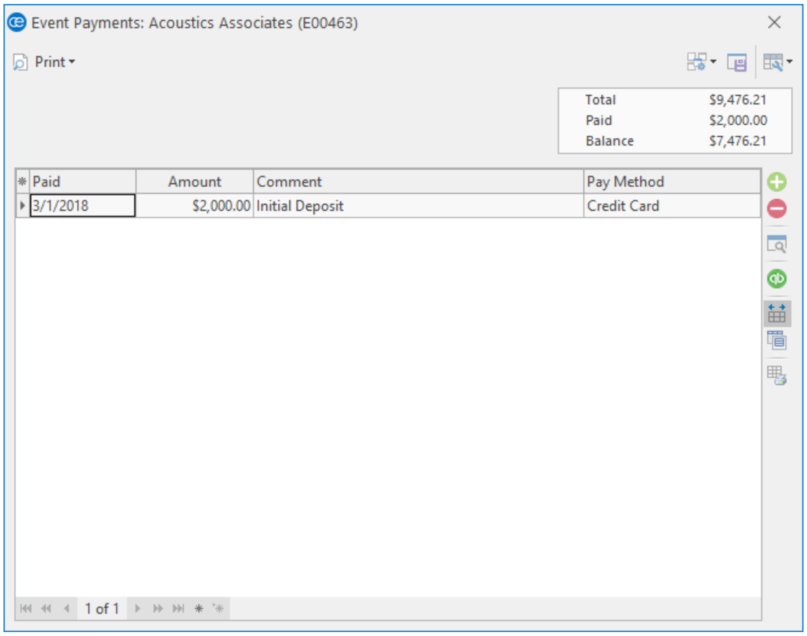
6. Optionally enter a Category or choose a category from the drop-down quickpick list.
   Note: *Examples of categories might include "Initial Deposit," "Final Payment," etc.*

7. Enter a Comment, if desired.

8. **[Optional]** Enter credit card details, if posting a credit card payment

9. **[Optional]** Enter additional information, including a Revenue Code or Account Code for the payment, as well as Check # and Check Date.
   Note: *None of this is required information.*

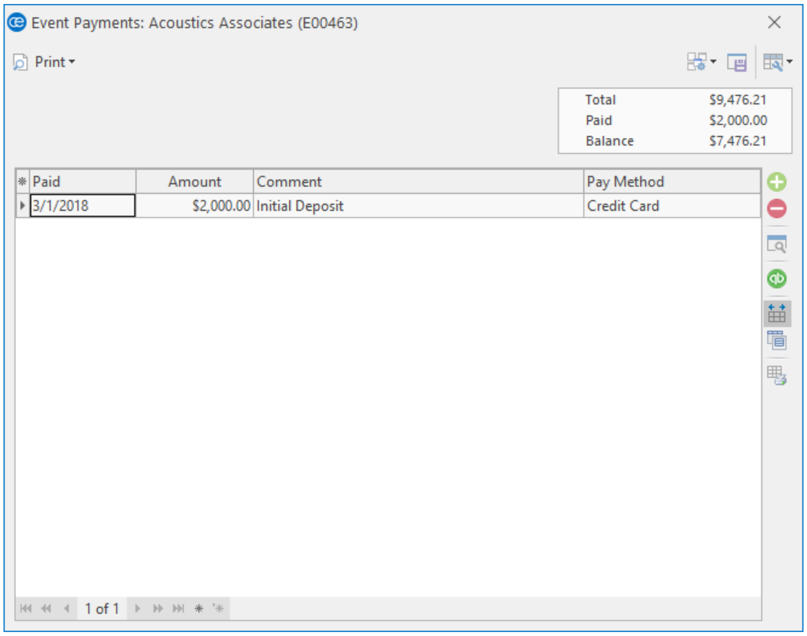
10. Click **OK**.
    Result: *The Payment Details window closes, and your new payment is listed in the Event Payments window.*



11. Click the X, located at the upper right-hand side of the window, to close the Event Payments window.

Editing an Existing Event Payment

1. Click the **Payments Made** button  , located in the toolbar on the upper right-hand side of the Event Manager, or from the **Tools** button at the top of your screen, depending on your personal configuration.
   Result: *The Event Payments window opens.*



2. Select any payment listed in the Event Payments window.

3. Click the **View/Edit Payment Details** button , located on the right-hand side of the window.
   Result: *The Payment Details window for that payment opens.*

4. Edit information as desired and click **OK**.
   Result: *You are returned to the Event Payments window.*

5. Click the X, located at the upper right-hand side of the window, to close the window.

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