

Quick Reference Guide: Program Setup

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General Setup/Customization

Set Up Default Tax, Service Charge, and Gratuity

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



See http://support.caterease.com/16/helpmenu/Setup/Establishing Default Tax Rates.htm.



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

Rename Existing Fields

- 1. Click the **Administration** ribbon tab.
- 2. Click the General button and choose Customize Names.
- 3. Click into any field and type a new name for the field as desired.
- 4. When finished, click **OK**. (A prompt will indicate that your prints will be affected due to the changes you made; you will need to redefine the fields in Print Designer. Click **OK** at the prompt.)

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(Scheduled) Items	Room Ch	arge	Room Chg		
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Enterprise	Times				
	Enterprise				
 Miscellaneous 	Miscellaneo	us			

See <u>http://support.caterease.com/16/helpmenu/Setup/Renaming_Fields.htm.</u>



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

Create User-Defined Fields

- 1. Click the **Setup** sidebar.
- 2. Click the User Defined Fields button.
- 3. Click the appropriate tab for the type of field you are creating. For example, click the **Events** tab for your Event Manager, **Accounts** tab for your Account Manager, etc.
- 4. Click into the first available user-defined field and type the new field name as desired.
- 5. Click the down arrow to the right of the <u>Type</u> field and select a format type for this field. (Choose from among Text; Phone; Number; Currency; Date; and Time.)
- 6. When finished, click **OK**.

User-Defined Fields	;			×
Accounts		Name Of Field	Type	
Contacts	1	Contact Type Preference	Text	ĸ
Events	2	Contact Time Preference	Text	5
Sub-Events	3	NA	Numb	er i
Sub-Events	4	NA	Currer	ncy
Menu Items	5	NA	Time	
Employees	6	NA	Text	-
Site Locations	7	NA	Text	-
Guestrooms	8	NA	Text	*
	9	NA	Text	*
Keminders	10	NA	Text	-
Contact History	11	NA	Text	-
Vendors	12	NA	Text	-
Ingredients	13	NA	Text	-
Permined Items	14	NA	Text	*
Required items	15	NA	Text	-
	16	NA	Text	*
	17	NA	Text	*
	18	NA	Text	*
	19	NA	Text	*
	20	NA	Text	•
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See <u>http://support.caterease.com/16/helpmenu/Setup/Creating_User_Defined_Fields.htm.</u>

Add User-Defined Fields to Your Screen

- 1. In Event Manager (or other "Manager"), click your right mouse button on the tab where you would like to place the user-defined field.
- 2. Click Customize.
- 3. Hold your left mouse button down on one of the available fields.
- 4. Drag the field into the desired location on your screen, and then release your mouse button. (See image on the following page.)
- 5. Repeat as desired, and then close the window.



tip

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



See http://support.caterease.com/16/helpmenu/Account Manager/Making Up Your Own Fields in Account Manager.htm

Set Up/Customize Quickpick Lists

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

Setup Quickpick Lists		×
3 -3		0 🕻
✔ · General	∧ Repeat Clier	nt
Reference	Referral	
Coordinator	Walk In	
Contact Title	Mailing	
Fax Subject	Cold Conta	ct
Email Subject	Wedding Pl	anner
Cancellation Type	Google	
Status	Bridal Show	1
Operation	Website	
- Account Code		
> · Account Manager		
> Event Manager		
> · Menu Items		
> · Recipes		
> Ingredients		
Required Items		
> Modifiers		
> Vendors		
> Payments		
Site Locations	~	

See <u>http://support.caterease.com/16/helpmenu/Setup/Customizing_Quickpick_Lists.htm</u>



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

Establish New Booking Defaults

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

New Booking	Defaults	×
Accounts	Status	Tentative
Contacts	Sales Rep	John Smith
	Coordinator	
Events	Theme	Banquet
Employees	Reference	
	Category	Social
Sub-Events	Pay Method	Credit Card
Prospects	Business Type	On-Premise
riospeeds	Operation	Riverside Banquet Center
Guestrooms	Default From Account Fiel	ds
	Party Name From Client	\checkmark
	Booking Contact	\checkmark
	Site Contact	\checkmark
	Notes	\checkmark
	Allergy	\checkmark
	Miscellaneous	
	Base Price Markup	
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See http://support.caterease.com/16/helpmenu/Setup/Establishing New Booking Defaults.htm



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

Establish Required Fields

- 1. Click the **Administration** ribbon tab.
- 2. Click the General button and choose Required Fields.
- 3. Click the tab representing the area of the program where you want to create required fields. For example, click the Events tab for your Event Manager,

Accounts tab for your Account Manager, etc.

- 4. In the right-hand pane of the window, click into the checkbox next to any field
- you want to designate as required information.
- 5. Optionally create conditionally required fields. (See Help topic, below.)
- 6. When finished, click **OK**.



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

🕲 Required I	Fields		×
Accounts	0 0 🗔		±∃ ✓ ×
Prospects	Conditional Group	Required Fields	
Events	Condition	∡ General	
Guestrooms	Business Type = Delivery	Event Date	
	Business Type = On-Premise	Party Name	
	Business Type = Wedding	Theme	
	All Events	Category	
		 Booking Contact 	Image: A start of the start
		 Site Contact 	
		✓ Miscellaneous	
		Sales Rep	
		Coordinator	
		Reference	
		Business Type	
		Operation	
		Pay Method	
		Loyalty #	
		Parking Lot	
		Contract Return Date	
		 Guests 	
		Optional Billing Information	
		Sub-Events	
		 Additional 	
		FF Events Sub-Events	
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See <u>http://support.caterease.com/16/helpmenu/Setup/Making Fields Required.htm.</u>

Set Up the Scratch Pad

- 1. Click the **Administration** ribbon tab.
- 2. Click the Lists button and choose Scratch Pad.
- 3. Click the Add New Category button . located on the left-hand side of the window.
- 4. Click **Yes** at the confirmation prompt.
- 5. Type a name for the new category and press [Enter].
- 6. Click into the large white text block on the right-hand side of the window and type notes for this category. Add images or current date and time by right-clicking and choosing Insert > Image or Insert > Current Date & Time.
- 7. Click the \bowtie at the upper right-hand side of the window. Note: You will be prompted to save your changes.

			×
			- []
ategories	Scratch Pad Comments		
General	Enter in commonly used text to be pulled into any text editor throughout the program.		
General General Vedding Vedding Social Delivery Equipment Vedding Notes Account Notes Plating Instructions Special Comments Follow Up Invoice Common History Notes Common Reminders Common Scheduler Notes	Enter in commonly used text to be pulled into any text editor throughout the program.		

See http://support.caterease.com/16/helpmenu/Setup/Setting Up the Scratch Pad.htm.



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

Add Users

- 1. Click the Administration ribbon tab and choose Security.
- 2. Click the **Users** tab.
- 3. Click the **Add User** button , located on the right-hand side of the window.
- 4. Enter a <u>User Name</u> for the new user.
- 5. Click the ellipsis button to the right of the <u>Password</u> field to assign a password.
- 6. Click **Yes** at the confirmation prompt.
- 7. Enter a password for the user.
- Note: You will be prompted to re-enter the password.
- 8. Optionally click into the <u>Active Directory Name</u> field and enter the user name for logging into Windows or Caterease Connect.
- 9. Fill out Contact information (phone, e-mail) as desired.
- 10. Click OK.
- 11. Click the Security tab on the left-hand side of the window and establish security settings.
- 12. When finished, click **OK**.

General Security Settings Administrator Use Active Directory Administrator Enable User Event Locking Enable User Prospect Locking Groups & Users Is Sales Rep Sales Rep Groups & Users Administrator Users Administrator John Smith John Smith Jo Ann Mulnix Jo Ann Mulnix Roxanne M. Mc Namer Roxanne M. Mc Namer	Caterease	Security				×
Administrator Use Active Directory Enable User Event Locking Enable User Account Locking Groups & Users Users Were Name Is Sales Rep Sales Rep Active Administrator Value Name Is Sales Rep Sales Rep Active Administrator Kathy Wilson John Smith John Smith John Smith Jo Ann Mulnix Roxanne M. Mc Namer Roxanne M. Mc Namer	General Secu	urity Settings		A days is	istrator	
 Enable User Event Locking Enable User Account Locking Groups & Users Groups & Users Administrator Varta and the set of th	Use Activ	ve Directory		Admir	nistrator	
Groups & Users Administrator Kathy Wilson John Smith John Smith Jo Ann Mulnix Roxanne M. Mc Namer Roxanne M. Mc Namer	Enable U	ser Event Locking ser Account Locking		Enable User Prospec	t Locking	
Groups * User Name Is Sales Rep Active Users Administrator Image: Comparison of the sales of the sales represented by the sales rep	Groups & U	sers				
Users Administrator Image: Comparison of the second s	Groups	* User Name	Is Sales Rep	Sales Rep	Active	
Kathy Wilson Kathy Wilson John Smith John Smith Jo Ann Mulnix Jo Ann Mulnix Roxanne M. Mc Namer Roxanne M. Mc Namer	Users	Administrator				2
John Smith Jo Ann Mulnix Roxanne M. Mc Namer Roxanne M. Mc Namer Jo Ann Mulnix Roxanne M. Mc Namer John Smith Roxanne M. Mc Namer John Smith Roxanne M. Mc Namer Roxanne M. Mc Namer		Kathy Wilson	✓	Kathy Wilson		0
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Roxanne M. Mc Namer Roxanne M. Mc Namer 🗹		Jo Ann Mulnix	\checkmark	Jo Ann Mulnix		

See http://support.caterease.com/16/helpmenu/Setup/Security/Adding a New User.htm

Add Sales Reps

- 1. Click the Administration ribbon tab and choose Security.
- 2. Click the **Users** tab.
- 3. Click the **Add User** button , located on the right-hand side of the window.
- 4. Enter a <u>User Name</u> for the new user.
- 5. Click the ellipsis button to the right of the <u>Password</u> field to assign a password.
- 6. Click **Yes** at the confirmation prompt.
- 7. Enter a password for the user.
- Note: You will be prompted to re-enter the password.
- 8. Click **OK**.
- 9. Enter contact information into the fields provided (Telephone/Cellular/Email).
- 10. Click into the checkbox labeled Is A Sales Rep.
- 11. Optionally add any notes by clicking the **Notes** tab and typing into the text block.
- 12. Optionally add a picture by clicking the **Picture** tab and choosing an image. **Note**: Add a picture by right-clicking into the field, selecting **Load From File**, and browsing to the image.
- 13. When finished, click **OK**.

🕲 User Securit	ty Details: Kathy Wils	on		×
General	General Information			
Interfacing	User Name	Kathy Wilson		
Security	Password	Assigned		
Groups	✓ Is Administrator	ls S	ystem Administrat	or …
	Active Directory	kathryn.wilson		
	Telephone	(239) 261-5828		
	Cellular	(239) 777-1954		
	Email	kathy@flavours.co	m	
	Color Management wi	th open-ended	access.	
	Notes Picture			
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See <u>http://support.caterease.com/16/helpmenu/Setup/Security/Adding_a_New_User.htm</u>

Configure E-mail Settings

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



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

Default Email Settings		×
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* User	General Setup	
John Smith	Internet Email Settings (SMTI Using Direct Emailing requires	P) s all settings to be filled out.
	Email Type	
	 Use Microsoft Outlook (Exte Simple MAPI 	nded MAPI)
	 Direct Emailing 	Test Connection
	User Information	
	Display Name	
	Email Address:	om
	Server Information Outgoing mail server (SMTP):	smtp.gmail.com
	Outgoing mail port:	465
	Encryption Type:	SSL 🔻
	Logon Information	
	User Name:	ca @gmail.com
	Password:	
	Setup Settings	
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See <u>http://support.caterease.com/16/helpmenu/Setup/Establishing_Email_Settings.htm</u>

Add Default Site Locations

1. Click the **Setup** sidebar.

- 2. Click the Site Locations button.
- 3. Click the Add Record button , located in the Home ribbon tab at the top of the screen.
- 4. Click **Yes** at the confirmation prompt.
- 5. Type a name for your new site location and press [Enter].
- 6. Enter additional information into each field. Optionally add a Picture, Description, and Notes.
- 7. Optionally click the **Directions** tab at the bottom of the window and enter directions to the location.
- 8. Optionally click the Required Items tab at the bottom of the window and associate required items with the site location.

G Site Locations: Cambier Park					– 🗆 X
🖬 🔀					い 日本
Site Locations		Site Locati	on Details		
A B C D E F G H I	JKLMNOP	General			
Custom: 🎇 Views 🕶 🍸 Filters 🕶	-	Name	Cambier Park		
* Name 🔺	City	Address	735 8th St S		
Cambier Park	Naples	City	Naples		
F.G.C.U. Library	Ft. Myers	St/Prov	FL Postal 34102		
Holiday Inn Downtown	Naples				
Museum	Naples	Telephon	e (239) 595-0550 Cellular () -		
		Category	Outdoor	-	
		Website	www.cambier.com		
		Tax Name	66		
		Descripti	on		
		Amen	ities include:		
		Open	air band shell		
		Com	nunity-built playground		
		Cover	ed pavilion		
		Ample	e parking		
		Ciay i			
Enter text to search Fi	nd Clear				
	cicui				
₩ ≪					Notes Directions Picture Required Items

See http://support.caterease.com/16/helpmenu/Setup/Entering Site Locations into the Site Locations Database.htm



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

Set Up Default Timelines

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

😉 Default Timeline Iter	ns					\times
Off Site Prep	•	*	ltem	Category	Time	•
Wedding Reception	0	Þ	Bar Opens	Front of House		
General Event		Г	Guests Arrive	Customer		
	*	Γ	Passed Hors D'oeurves	Front of House		
	ŤĒ	Γ	Meal Service	Front of House		
		Γ	Best Man Toast	Customer		
		Γ	First Dance	Customer		
		Г	Father/Daughter Dance	Customer		
		Γ	Cake Cutting	Customer		
			Notes			
				<u>O</u> K		<u>C</u> ancel

See http://support.caterease.com/16/helpmenu/Setup/Creating_Default_Timeline_Items.htm.



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

Set Up Default Checklists

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

Default Checklists					×] • 53
Event Booking	0	* Item	Category	Assigned	То
Banquet Setup	•	Get Signed Contract from Client	Sales	Kathy Wil	lson
Banquet Breakdown	. –	Get Initial Deposit	Sales	Kathy Wil	lson
Wedding Setup		Call For Final Guest Count	BOH	Kathy Wil	lson
Bar Setup	-	I Email Invoice	Sales	Kathy Wil	lson
···· Bar Breakdown		BEO to Chef	FOH	Kathy Wil	lson
		Auto Checklist Items For New E	vents		0
		Auto Checklist Items For New E Rule	vents		0
		Auto Checklist Items For New E * Rule No data and a second seco	vents		

See http://support.caterease.com/16/helpmenu/Event Manager/Creating a Checklist of To-Do Items.htm



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

Customize Your Tools Menu and Toolbar

- 1. Click the **Tools** button, located the **Home** ribbon tab of any Manager (Event Manager, Account Manager, etc).
- 2. Click **Customize**, located at the bottom of the **Tools** drop-down menu.
- 3. To remove a shortcut, click on a shortcut from the Tools Menu Shortcuts pane (left-hand side), hold, then drag to the trashcan icon at the bottom of the window.
- 4. To add a shortcut, click on a shortcut from the Available Shortcuts pane (right-hand side), and drag and drop into the Tools Menu Shortcuts pane.
- 5. To reposition buttons, drag and drop them up and down as desired in the list of Tools Menu Shortcuts.
- 6. When finished, click **OK**.
- 7. Click the Save Current Window Settings button to save your customizations.



Every Manager has a unique and dynamic Tools Menu and Tools Bar. Any frequently used tools can be made instantly accessible through the Tools Bar, while tools that you use "every so often" can be available in the Tools Menu drop-down list.



See http://support.caterease.com/16/helpmenu/General Information/Customizing the Tools Menu and Tool Bar.htm

Menu Setup/Customization

Customize Food/Service Item Types

- 1. Click the **Administration** ribbon tab.
- 2. Click the General button and choose Food/Service Item Types.
- Click into the <u>Type</u> field and type the new food/service item type over "N/A."
- 4. Click the down arrow to the right of the <u>Image</u> field and select an image from the drop-down list.
- 5. Click into the checkbox under the <u>Active</u> field to activate the new food/service item type.
- 6. Click into the **Associate Charges** area to associate a Room, Labor, Delivery, or Miscellaneous charge to the Item Type.

Note: You will need to assign tax/service charge rates for the new item type.

- 7. Drag and drop the item types into the desired position.
- 8. When finished, click **OK**.

ood/Service Item Types						×
					[🤣 Reset
Food/Service Item	n Types			Associate	e Charges	
Туре	Image	Active	Room	Labor	Delivery	Misc
Food	I۳	Image: A start and a start				
Beverage	₽	~				
Liquor	Y	~				
Equipment	R	\checkmark				
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Other	?	\checkmark			~	~
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					<u>OK</u>	<u>C</u> ancel

See <u>http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Setting Up Food Service Types.htm</u>



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

Create Your Menu

- 1. Click the **Setup** sidebar.
- 2. Click the Menu Manager button.
- Click the Add New Menu button . located on the upper left-hand 3. side of your screen.
- 4. Click **Yes** at the confirmation prompt.
- 5. Type a name of the new menu and press [Enter].
- θ 6. Add a new menu item by clicking the Add Menu Item button located at the top of the Menu Manager window.
- 7. Type the name of the food/service item into the blank Item Name field, and then press [Tab].
- 8. Fill out the Price, Prep Area, Category, Comment, etc., information as desired.

Note: Click the Quick Column Customizing button *, located at the left of the Item Name field, to access optional fields.

9. When finished, click the \bowtie at the top right-hand side of the window.

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🖳 Light Side 🗧	* Item Name		Price	Prep Area	Category	Comment			**
Lunch Buffet	The Skyway Budget	ıffet	\$18.95	Hot Line	Breakfast			I۳	-
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Salads	Wyles Breakfa	st Buffet	\$17.95	Hot Line	Breakfast			I۳	
▲ Luncheon	Midwesterner		\$18.95	Hot Line	Breakfast			I۳	
Included Desserts	Daybreaker		\$15.95	Hot Line	Breakfast			I۳	
Premium Desserts	Morning Delig	ht	\$15.95	Hot Line	Breakfast			I۳	· ·
# Dinner	Eye Opener		\$15.95	Hot Line	Breakfast			I۳	₩
Steaks	The Harbor Bu	ffet	\$15.95	Hot Line	Breakfast			I۳	
Poultry	Wyle's Special		\$15.95	Hot Line	Breakfast			I۳	
Seafood									
Incuded Desserts									
Premium Desserts									
m Dinner Buffet									
at Hors D'Oeuvres									
Hot	∺	► ► ► ►							
Cold									
Cold	Description	The Skyway Buffet							
Snacks	Label	includes: fluffy scrambled eggs, cheese b	lintzes, bac	on and sausage	e patties, sliced ham	, hashbrown potatoes, fresh fruit, c	cinnamor	1 rolls,	
Trays	<u>cube</u>	bagels and assorted pastries, chilled fruit	juice, coffe	e, tea or milk					
Desserts	Notes								
Breaks	Recipe								
Bar	Demoired being								
Beverage and Treats	Required items								
Labor	Modifiers								
Packages	Package Items								
Modifiers	<u>. centege reellis</u>								
A/V Equip	Picture								****
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See http://support.caterease.com/16/helpmenu/Setup/Menu Manager/Adding a New Menu.htm.



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

Create an Ingredients List

- 1. Click the **Setup** sidebar.
- 2. Click the Ingredient Manager button.
- 3. Click the **Add Menu** button , located on the upper left-hand side of the screen.
- 4. Click **Yes** at the confirmation prompt.
- 5. Type a name for your new ingredients list, and press [Enter].
- Add a new ingredient by clicking the Add Ingredient button
 located at the top of the Ingredients List window.
- 7. Type the ingredient name into the <u>Item Name</u> field, and press **[Tab]** to move to the next field.
- 8. Enter the <u>Category</u>, <u>Prep Area</u>, <u>Type</u>, and <u>Comment</u> into their respective fields.

Note: Click the Quick Column Customizing button *k*, located at the left of the <u>Item Name</u> field, to access optional fields.

9. When finished, click the \bowtie at the top right-hand side of the window.

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		Chocolate Ice Creat Rainbow Sherbet Sour Cream Cheese Ball (One Pe Ricotta Cheese	n bund) ₩ ₩	Dairy Dairy Dairy Dairy Dairy		Des Des Dai App Dai	erts erts ry petizers ry				
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See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Ingredients Lists.htm.



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

Assign Ingredients

- 1. Click the **Setup** sidebar.
- 2. Click the Menu Manager button.
- 3. In the left-hand pane of Menu Manager, click on the title of the menu you would like to add an ingredient to.
- 4. Click the **Recipe** tab, located towards the bottom of the screen.
- , located on the right-hand side of the window. Click the Select Items button
 Highlight and select ingredients.
- 7. Click into the <u>Qty</u> column and enter a quantity for each ingredient item.

Note: Click the Quick Column Customizing button *, located to the left of the Item Name field, to access optional fields.

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Sides	Lite Start Buffet		\$15.95	Hot Line	2	Breakfast				I۳	間
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P Dinner 👘	Daybreaker		\$15.95	Hot Line	2	Breakfast				I۳	1
Dinner Buffet	Morning Deligh	t	\$15.95	Hot Line	2	Breakfast				14	+
Hors D'Oeuvres	Eye Opener		\$15.95	Hot Line	2	Breakfast				I۳	5
Desserts	The Harbor Buf	fet	\$15.95	Hot Line	2	Breakfast				14	
Breaks	Wyle's Special		\$15.95	Hot Line	2	Breakfast				I۳	
Bar											
Beverage and Treats											
Labor											
Packages											
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Setup	Description	Instructions			Recipe f	or The Skyway Bu	ffet (Servings: 1)	٩.	Servings In Re	cipe	
	<u>Label</u>	Fluffy scrambled eggs, cheese blintzes	, bacon and		* Item N	ame	Item Unit	Qty	Total	E.,	
Wedding	Notes	sausage patties, sliced ham, hash-brow	In potatoes t	0	▶ Eggs		ltem	3	\$0.30		
Event Planners	Notes	be served in Chaffers. Fresh fruit, cinn	amon rolls,		Cheese	Blintze	ltem	1	- C × S • □		
	Recipe	bagels and assorted pastries to be place	ed on trays.		Bacon	Strips	Ounce	2	\$0.40	t t	
	Required Items				Sausag	e	ltem	1	\$0.23		
	Martif				Ham		Comment Image: Second	2	\$0.38		
	Modifiers				Hasbro	wn Potatoes	Ounce	2	\$0.24		
	Package Items				Fresh F	ruit	Ounce	3	\$0.57		
	Picture								8.07	f_X	tIII

See http://support.caterease.com/16/helpmenu/Setup/Menu Manager/Building Ingredients Lists.htm.

Create a Required Items List

- 1. Click the **Setup** sidebar.
- 2. Click the **Required Items** button.
- 3. the left-hand pane of the window.
- 4. Click **Yes** at the confirmation prompt. 5. When finished, click the \bowtie at the top right-hand side of the window.



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

See http://support.caterease.com/16/helpmenu/Setup/Menu Manager/Building Required Items Lists.htm

Assign Required Items

- 1. Click the **Setup** sidebar.
- 2. Click the Menu Manager button.
- 3. In the left-hand pane of Menu Manager, click the title of the menu you would

like to assign a required item to.

- 4. Click the **Required Items** tab, located towards the bottom of the screen.
- 5. Click the **Select Items** button at the right-hand side of the Required Items window.
- 6. Highlight and select the required items.
- 7. Enter a <u>Default Qty</u> for your required items.
- 8. Click the **Quick Column Customizing** button to access additional columns, such as <u>Link</u>, where you can optionally link the quantity of this item to the number of corresponding menu items ordered in an event.

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Salads	▲ =	Wyles Breakfas	t Buffet	\$17.95	Hot Line	Breakfast			ŀ	M _
- Luncheon	▲ 亡	Midwesterner		\$18.95	Hot Line	Breakfast			1	μ 🖃
Dinner		Daybreaker		\$15.95	Hot Line	Breakfast				۳ 式
Dinner Buffet	Q	Morning Delig	ht	\$15.95	Hot Line	Breakfast				14
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Equipment										
Setup		Description	 Required Items for The Skyway Buffet — 							
Additional Charges		Label	* Item Name	ltem	Unit	Category	Comment	Default Qty	Link 🗔	
Wedding		Notes	8 Quart Chafing Dish	Each		Equipment		0.08		
Event Planners		Notes	Dinner Plate	Each		Tableware		1.2		,
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See http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Required Items Lists.htm



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

Add Vendors

- 1. Click the **Setup** sidebar.
- 2. Click the Vendor List button.
- 3. Click the **Add Record** button , located in the **Home** ribbon tab at the top
- tip Each menu item (or ingredient item) can have a specific vendor associated with it.

- 4. Enter additional information into each field.
- 5. Optionally add a <u>Picture</u>, <u>Description</u>, <u>Notes</u>, and <u>Directions</u>.

😉 Vendor List: The Laughing Cow			- 0	\times
7				
Vendors		Vendor Deta – General –		
Custom: 🎇 Views 🔻 🏹 Filters 🕶	City	Name Address	The Laughing Cow 35 Ardisia Road	
The Laughing Cow	Lake Buena Vista	City	Lake Buena Vista	
Taylor Rental	Naples	St/Prov	FL Postal 32568	
Sysco	Tampa			
Premium Beverage	Sarasota	Telephone	: (505) 665-6252 Cellular (505) 821-8118	
Marcel Bakery	Fort Myers	Catagoni	Lang Distance 2 Day Matica	
Katies Flowers	Ft Myers	Category	Long Distance - 5 Day Notice	
Incredible Fresh	Naples	Website	http://www.thelaughingcow.com	
In House				
Grand Western Beef	Pompano	Contact: H	Hamilton, Joseph 💦	
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		Title	Office Manager	
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Inf and a 1 of 10 ▶ ▶ ▶ ★ '*			Description Directions Picture Notes	
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See http://support.caterease.com/16/helpmenu/Event Manager/Printing Menu Item Vendor Lists.htm

Room/Venue Customization

Add a Master List of Setup Styles

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



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

	Setup Style Details
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*	Setup Style
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H	Reception
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See <u>http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm</u>

Create Locations to Group Your Rooms (Optional)

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

See http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm

Add Banquet Rooms to Your Locations

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

See http://support.caterease.com/16/helpmenu/Setup/Setting-up-Banquet Rooms.htm

Establish Setup Styles and Capacities for a Room

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

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					Sun-Sea		
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See <u>http://support.caterease.com/16/helpmenu/Setup/Setting up Banquet Rooms.htm</u>

Staff/Position Setup/Customization

Add Employees

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

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	E00009 Appressing action (2018 S20-2044				
	Elephone (239) 287-9595 Cellular (239) 294-5585				
	E00010 Collins, Michael (518) 274-8199 Email terry@yahoo.con		ËÕ		
	E00016 Dallas, Larry (239) 492-9994 Status Seasonal 👻				
	E00011 Dillinger, Scott (239) 293-0100				
	E00020 Furley, Ralph (901) 311-8283				
	E00007 Hazelby, Amy (239) 233-9191 Agency In-House +				
	E00028 Higgins, Jonathon (41) 283-8881				
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Tools	E00015 Magnum, Thomas (239) 919-2200				
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See <u>http://support.caterease.com/16/helpmenu/Setup/Employee_Manager/Creating a Default List of Employees.htm</u>

Add Positions

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

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	Start Default End Default Notes Wizard Rules Wizard Rules Kule Category = Social - (1 Per 15 guests) Category = Business - (1 Per 20 guests) Theme = Wedding Reception - (1 Per 10 guests) Theme = Meeting - (1 Per 15 guests)	

See http://support.caterease.com/16/helpmenu/Setup/Employee Manager/Creating Default Shifts or Positions.htm

Assign Positions

- 1. Click the Main sidebar.
- 2. Click the Employee Manager button.
- 3. Click the **Positions** tab, located at the bottom of the Employee Manager screen.
- 4. Click the **Select Positions for Employee** button Link, located on the right-hand side of the screen.
- 5. Highlight one or more positions and then click the **Select** button.
- 6. Click the 🖄, located on the upper right-hand side of the Select Position window, to close the window.
- 7. Populate any additional information, such as Uniform and Wage information, as desired.
- 8. When finished, click the **Save Changes** button [1], located in the **Home** ribbon tab.

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See http://support.caterease.com/16/helpmenu/Setup/Employee Manager/Assigning a Position to an Employee.htm

Global Settings Customization

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

See http://support.caterease.com/16/helpmenu/Setup/Editing_Global_Settings.htm

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

Miscellaneous Setup/Customization

Design Prints in Print Designer

See http://support.caterease.com/16/helpmenu/Setup/Print Designer/Adding a New Event Print in Print Designer.htm

Create Custom Merge Documents in Marketing Tools

See <u>http://support.caterease.com/16/helpmenu/Setup/Marketing_Tools/Creating New Merge Documents.htm</u>

Import Prospects/Accounts

<u>http://support.caterease.com/16/helpmenu/Prospect_Manager/Importing a List of Prospects.htm</u> <u>http://support.caterease.com/16/helpmenu/Account_Manager/Importing_Customers_into_Account_Manager.htm</u>

Customize Your Screens

http://support.caterease.com/16/helpmenu/Event_Wizard/Creating_Custom_Event_Wizards.htm

Customize Your Queries

http://support.caterease.com/16/helpmenu/Query Tools/Working with Grids.htm