

Quick Reference Guide: Program Setup

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 **Food** field.
4. Repeat as desired to enter default tax rates for all other item types.
5. Optionally continue to add rates into the **Second** and **Third** tax columns, 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**.



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.

Default Tax & Service Charge Rates

→ Tax Schedules

By Food/Service Item Type Enter As Percentage (10.250 = 10.25%)

	First	Second	Third	Gratuity	<input type="checkbox"/> Tax Grat <input type="checkbox"/> At New Rate	Serv Chg	<input type="checkbox"/> Tax Serv Chg <input type="checkbox"/> At New Rate
Food	7	0	0	0	0	16	0
Beverage	7	0	0	0	0	16	0
Liquor	7	0	0	0	0	16	0
Equipment	7	0	0	0	0	16	0
Labor	7	0	0	0	0	16	0
Room	7	0	0	0	0	16	0
Other	7	0	0	0	0	16	0
NA	0	0	0	0	0	0	0

Tax Exempt
☐ Tax Exempt
Exempt #
Expires

Additional Adjustments
Subtotal \$0.00
First \$0.00
Second \$0.00
Third \$0.00
Gratuity \$0.00
Service Charge \$0.00

Item Codes

OK Cancel

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

Rename Existing Fields

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



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.

Section	Field Name	Current Value
General	Client/Organization	Client
	Party Name	Party Name
	Sales Representative	Sales Rep
	Coordinator	
	Reference	Reference
	Loyalty #	Loyalty #
	Required Items	Required Items
Financials	Gratuity	Gratuity
	Service Charge	Service Charge
	Taxes 1	First
	Taxes 2	Second
	Taxes 3	Third
	Event Value	Value
Events	SubEvent	Sub-Event
	Event Category	Category
	Banquet Room	Room
	Room Category	Room Category
	Room Charge	Room Chg
	(Scheduled) Items	Items
Times		
Enterprise		
Miscellaneous		

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

Create User-Defined Fields

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




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.

	Name Of Field	Type
1	Contact Type Preference	Text
2	Contact Time Preference	Text
3	NA	Phone
4	NA	Number
5	NA	Currency
6	NA	Date
7	NA	Time
8	NA	Text
9	NA	Text
10	NA	Text
11	NA	Text
12	NA	Text
13	NA	Text
14	NA	Text
15	NA	Text
16	NA	Text
17	NA	Text
18	NA	Text
19	NA	Text
20	NA	Text

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

Add User-Defined Fields to Your Screen

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

The screenshot displays the CaterEase software interface. The main window is titled "Event Manager: Cruises & Vacations, Inc. - E00415". It features a menu bar (Select, Reports, Display, Administration, Help) and a toolbar with icons for Basic Text Editing, Tools, Navigation, Find, and Data. The left pane shows a list of events, with "Cruises & Vacations, Inc." selected. The right pane displays "Event Details" for this event, including client information and a "Notes" section. A "Customize" window is open on the right, showing a "Layout Tree View" and a list of "Available Items". A dashed arrow points from the "Contract Return Date" field in the "Available Items" list to the "Notes" field in the "Event Details" window.

Event Details:

Client	Cruises & Vacations, Inc.
Address	5001 W 80Th St. #565 Ft. Myers, FL 33947
Telephone	(612) 835-5575
Email	

Event Details - General/Miscellaneous:

Party Name	Corporate Meeting	Event #	E00415
Sales Rep	John Smith	Date	5/15/2018
Theme	Meeting	Status	Tentative
Category	Business	Planned	25
Booking Contact	Powers, Sandy	Actual	25
Site Contact	Powers, Sandy	Guaranteed	23

Notes:


Set podium in the middle of the room.

Customize - Available Items:

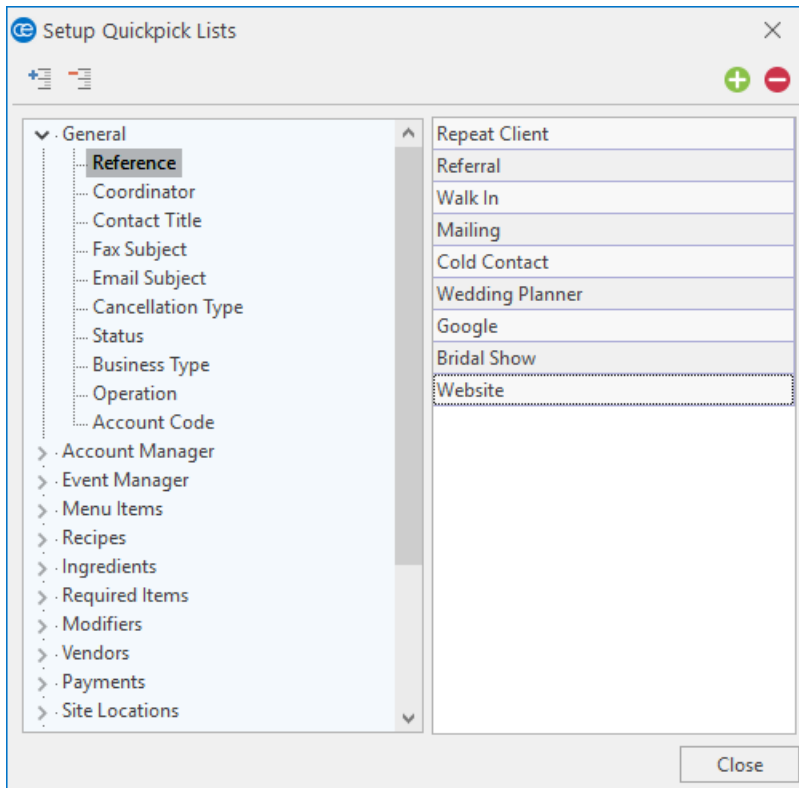
- Adults
- Booked By
- Cancel Date
- Children
- Contract Return Date
- Folio #
- Guests
- Loyalty #
- Parking Lot
- PO #
- New Group
- Cancellation Information
- Cancel Type
- Cancel Charge

See http://support.catease.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**.

tip 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.



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

Establish New Booking Defaults

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

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.

New Booking Defaults

Accounts

Contacts

Events

Employees

Sub-Events

Prospects

Guestrooms

Status

Sales Rep

Coordinator

Theme

Reference

Category

Pay Method

Business Type

Operation

Default From Account Fields

Party Name From Client

Booking Contact

Site Contact

Notes

Allergy

Miscellaneous

Base Price Markup

Tentative

John Smith

Banquet

Social

Credit Card

On-Premise

Riverside Banquet Center

☒

☒

☒

☒

☒

OK

Cancel

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

Establish Required Fields

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

Accounts
Prospects
Events
Guestrooms

Conditional Group

Condition

- Business Type = Delivery
- Business Type = On-Premise
- Business Type = Wedding
- All Events

Required Fields



- General
 - Event Date ☒
 - Party Name ☐
 - Theme ☐
 - Category ☐
 - Booking Contact ☒
 - 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

Events Sub-Events

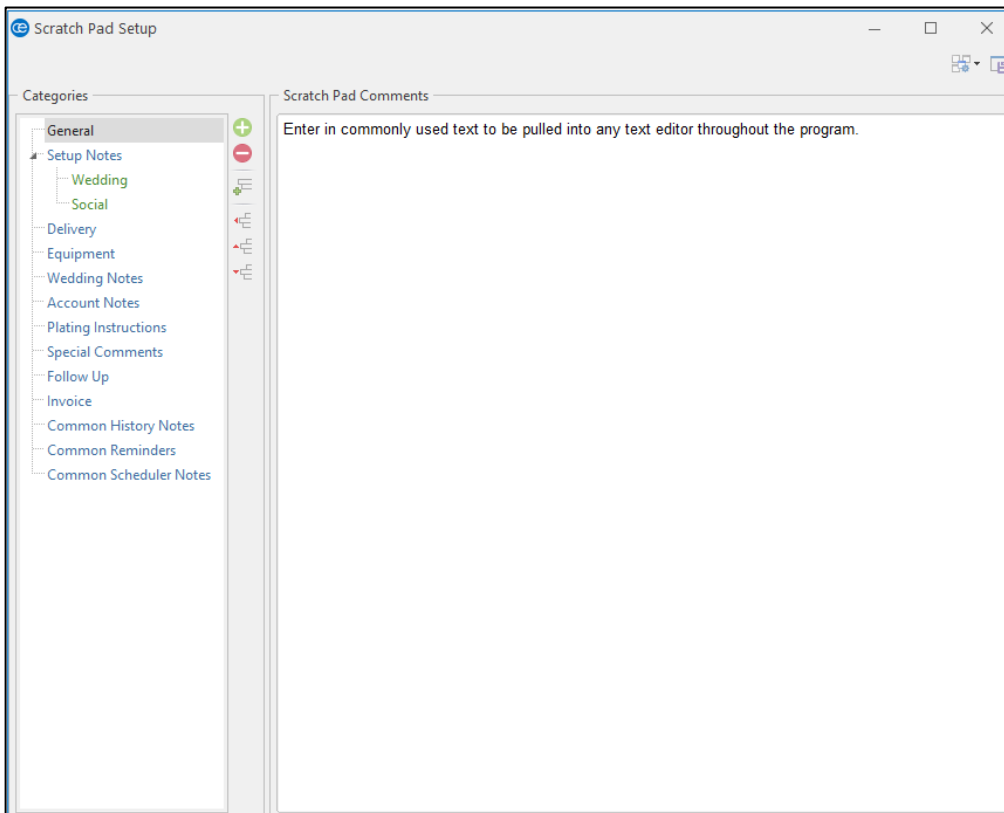
OK Cancel

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

Set Up the Scratch Pad


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

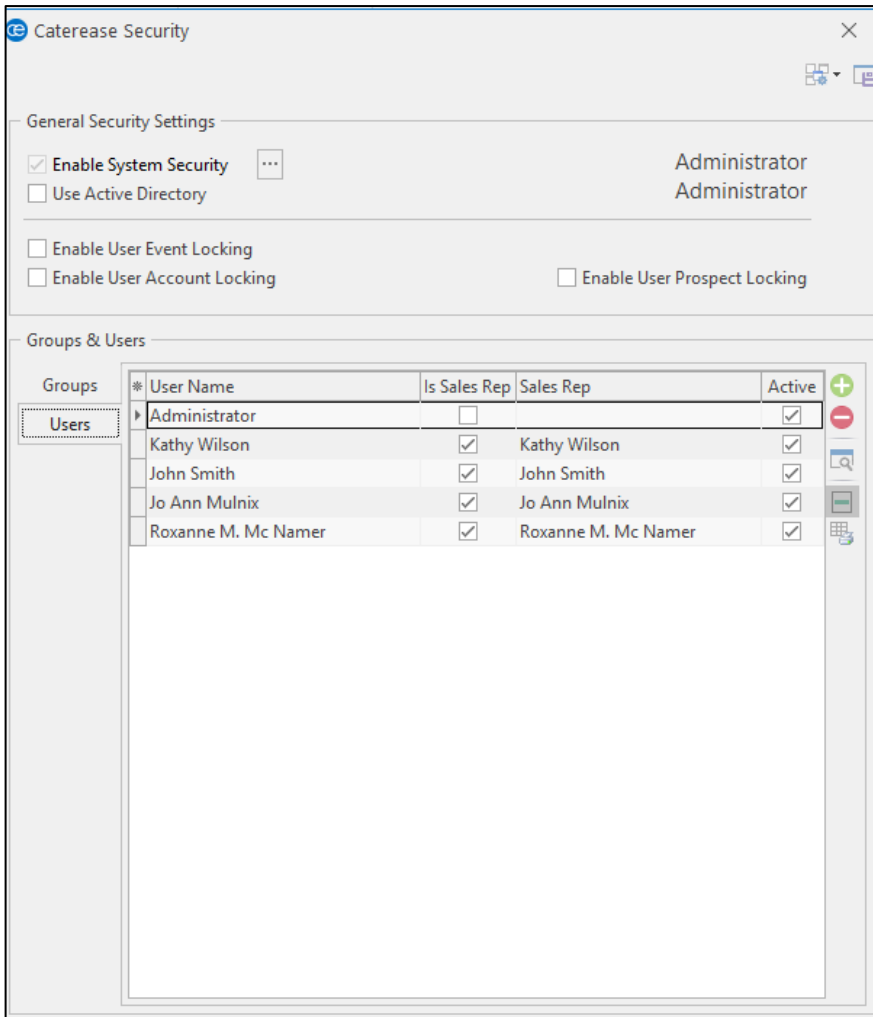
tip You can avoid repetitive typing by storing large amounts of commonly used text, such as Comments, Notes, special requests, etc., into the Scratch Pad.



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

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 User Name for the new user.
5. Click the ellipsis button to the right of the Password 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 Active Directory Name 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**.

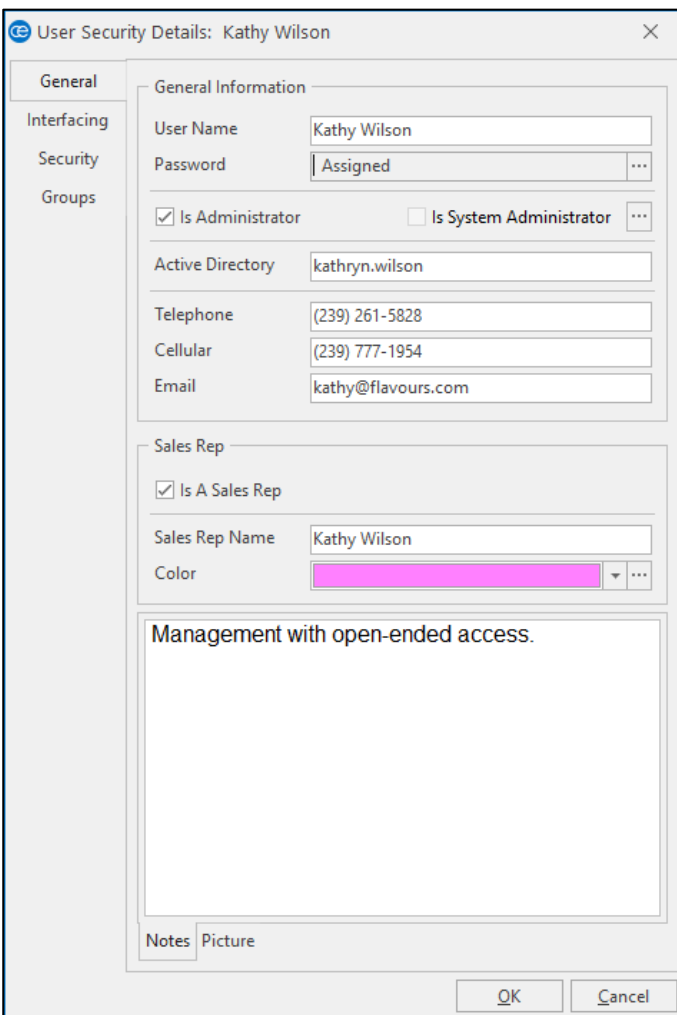


* User Name	Is Sales Rep	Sales Rep	Active
Administrator	<input type="checkbox"/>		<input checked="" type="checkbox"/>
Kathy Wilson	<input checked="" type="checkbox"/>	Kathy Wilson	<input checked="" type="checkbox"/>
John Smith	<input checked="" type="checkbox"/>	John Smith	<input checked="" type="checkbox"/>
Jo Ann Mulnix	<input checked="" type="checkbox"/>	Jo Ann Mulnix	<input checked="" type="checkbox"/>
Roxanne M. Mc Namer	<input checked="" type="checkbox"/>	Roxanne M. Mc Namer	<input checked="" type="checkbox"/>

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 User Name for the new user.
5. Click the ellipsis button to the right of the Password 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 Security Details: Kathy Wilson

General

Interfacing

Security

Groups

General Information

User Name: Kathy Wilson

Password: Assigned

☒ Is Administrator ☐ Is System Administrator

Active Directory: kathryn.wilson

Telephone: (239) 261-5828

Cellular: (239) 777-1954

Email: kathy@flavours.com

Sales Rep

☒ Is A Sales Rep

Sales Rep Name: Kathy Wilson

Color: [Color Selection]


Management with open-ended access.

Notes Picture

OK Cancel

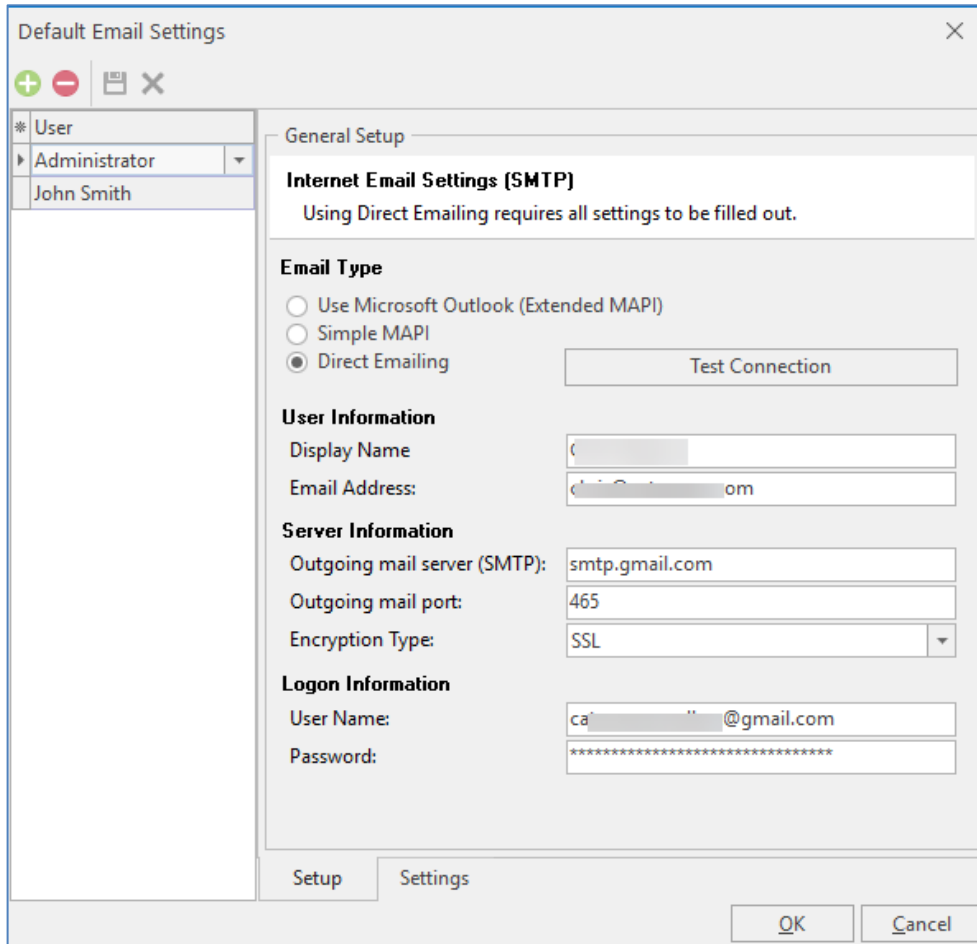
See http://support.caterease.com/16/helpmenu/Setup/Security/Adding_a_New_User.htm

Configure E-mail Settings

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




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.



The screenshot shows the 'Default Email Settings' dialog box. On the left is a list of users: 'Administrator' and 'John Smith'. The 'General Setup' tab is active. Under 'Internet Email Settings (SMTP)', it states 'Using Direct Emailing requires all settings to be filled out.' The 'Email Type' section has three radio buttons: 'Use Microsoft Outlook (Extended MAPI)', 'Simple MAPI', and 'Direct Emailing' (which is selected). A 'Test Connection' button is next to it. The 'User Information' section has fields for 'Display Name' and 'Email Address'. The 'Server Information' section has fields for 'Outgoing mail server (SMTP):', 'Outgoing mail port:', and 'Encryption Type:'. The 'Logon Information' section has fields for 'User Name:' and 'Password:'. At the bottom are 'Setup' and 'Settings' tabs, and 'OK' and 'Cancel' buttons.

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

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.



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.

Site Locations: Cambier Park

Site Locations

Name	City
Cambier Park	Naples
F.G.C.U. Library	Ft. Myers
Holiday Inn Downtown	Naples
Museum	Naples

Site Location Details

General

Name: Cambier Park

Address: 735 8th St S

City: Naples

St/Prov: FL Postal: 34102

Telephone: (239) 595-0550 Cellular: () -

Category: Outdoor

Website: www.cambier.com

Tax Name:

Description



Amenities include:

- Open-air band shell
- Community-built playground
- Covered pavilion
- Ample parking
- Clay tennis courts

Notes Directions **Picture** Required Items

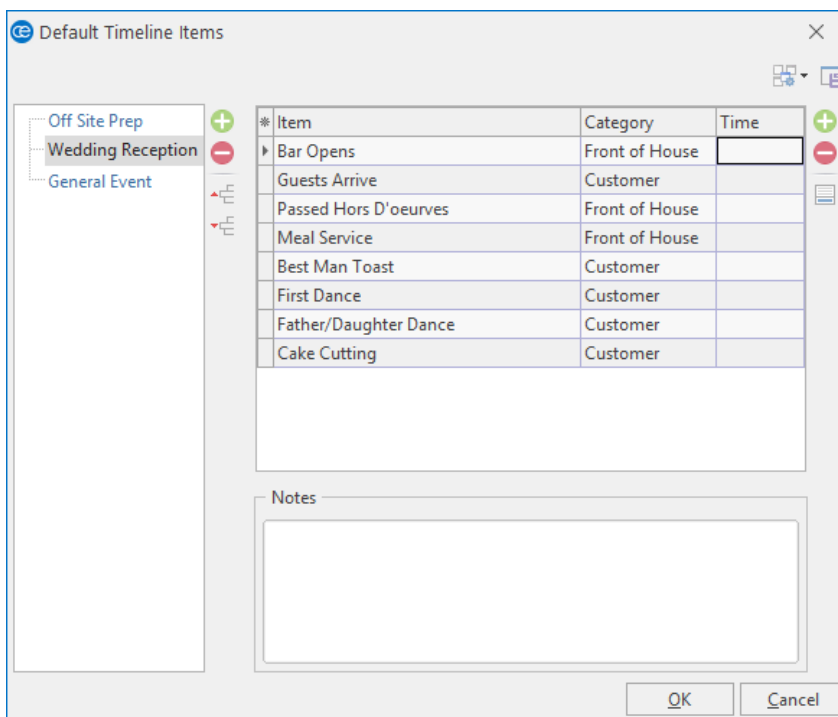
See http://support.caterease.com/16/helpmenu/Setup/Entering_Site_Locations_into_the_Site_Locations_Database.htm

Set Up Default Timelines

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



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





#	Item	Category	Time
1	Bar Opens	Front of House	
2	Guests Arrive	Customer	
3	Passed Hors D'oeuvres	Front of House	
4	Meal Service	Front of House	
5	Best Man Toast	Customer	
6	First Dance	Customer	
7	Father/Daughter Dance	Customer	
8	Cake Cutting	Customer	

Notes

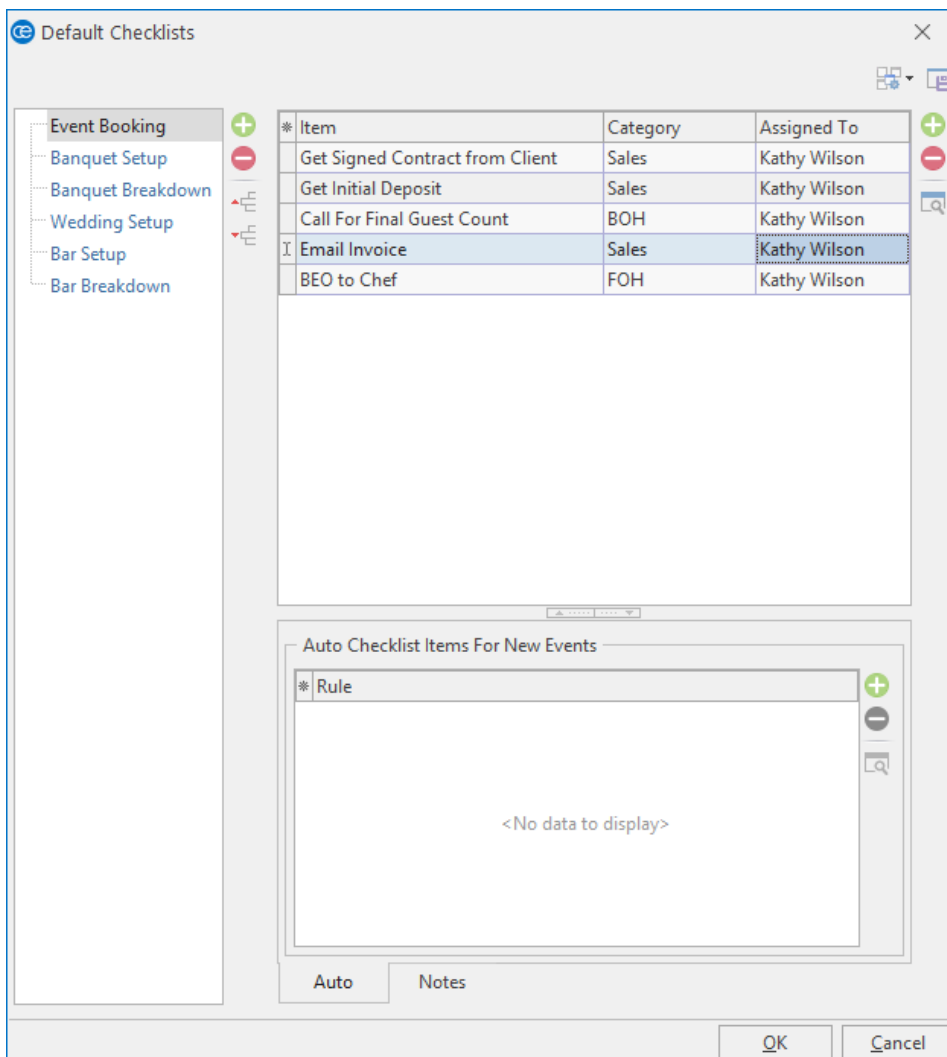
See http://support.caterease.com/16/helpmenu/Setup/Creating_Default_Timeline_Items.htm.

Set Up Default Checklists

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



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.



* Item	Category	Assigned To
Get Signed Contract from Client	Sales	Kathy Wilson
Get Initial Deposit	Sales	Kathy Wilson
Call For Final Guest Count	BOH	Kathy Wilson
Email Invoice	Sales	Kathy Wilson
BEO to Chef	FOH	Kathy Wilson

Auto Checklist Items For New Events

* Rule

<No data to display>

Auto Notes

OK Cancel

See http://support.caterease.com/16/helpmenu/Event_Manager/Creating_a_Checklist_of_To-Do_Items.htm

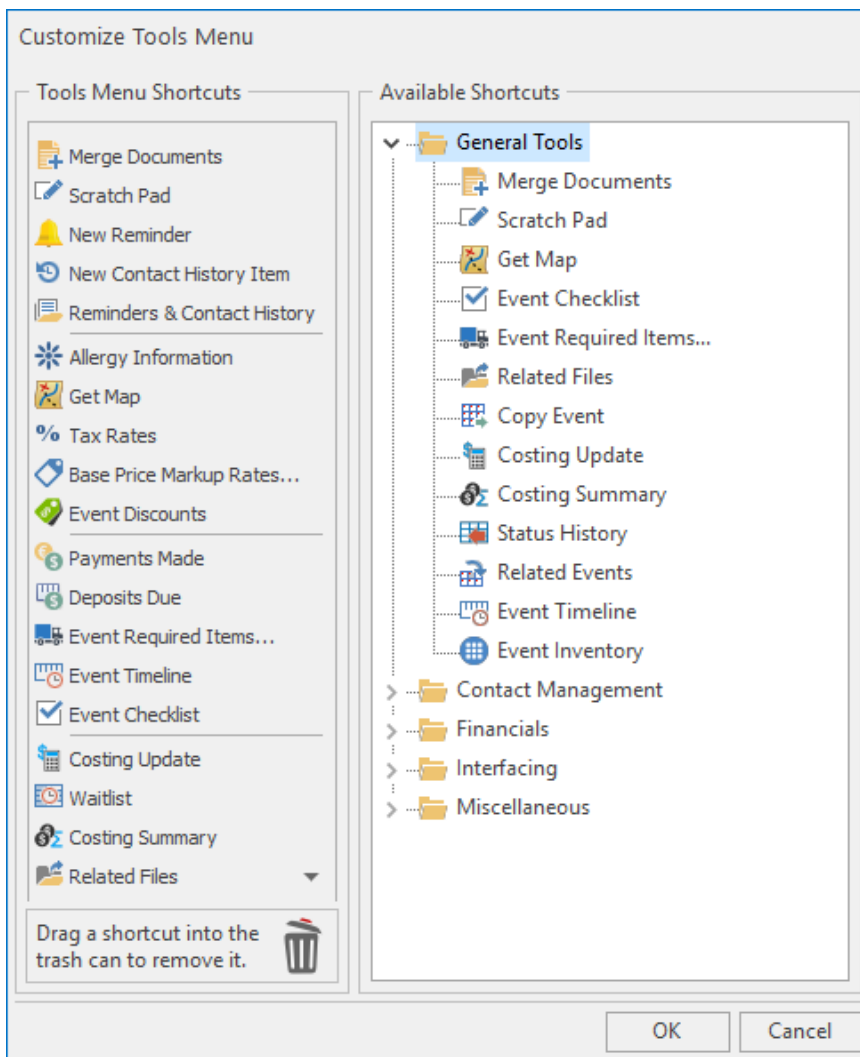
Customize Your Tools Menu and Toolbar

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**.



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.

7. Click the **Save Current Window Settings** button  to save your customizations.



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

tip

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

Food/Service Item Types



Reset


Food/Service Item Types			Associate Charges			
Type	Image	Active	Room	Labor	Delivery	Misc
Food		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beverage		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Liquor		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labor		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Room		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


OK Cancel

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

Create Your Menu

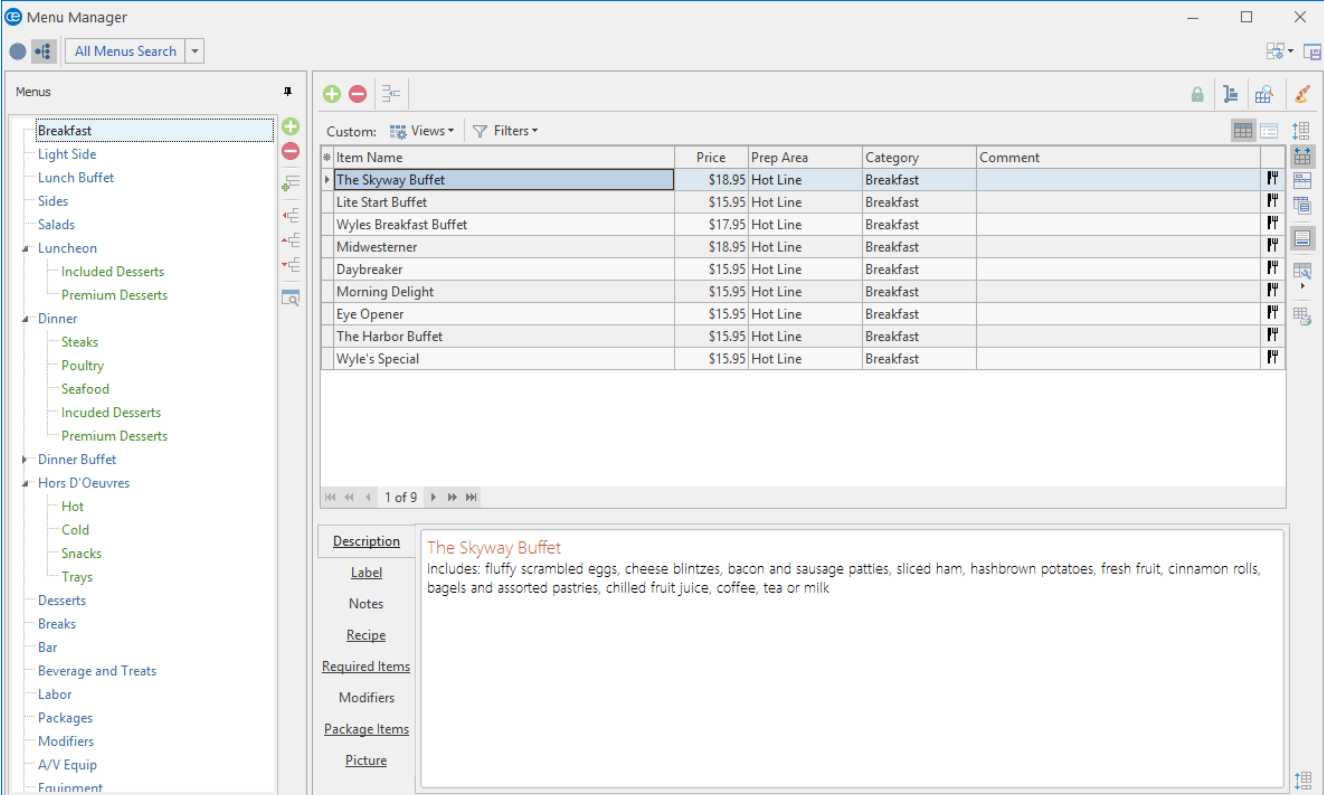
1. Click the **Setup** sidebar.
2. Click the **Menu Manager** button.
3. Click the **Add New Menu** button , located on the upper left-hand side of your screen.
4. Click **Yes** at the confirmation prompt.
5. Type a name of the new menu and press **[Enter]**.
6. Add a new menu item by clicking the **Add Menu Item** button , located at the top of the Menu Manager window.
7. Type the name of the food/service item into the blank 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  at the top right-hand side of the window.



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.





The screenshot shows the Menu Manager application window. On the left is a sidebar with a tree view of menu categories: Breakfast, Light Side, Lunch Buffet, Sides, Salads, Luncheon, Included Desserts, Premium Desserts, Dinner, Steaks, Poultry, Seafood, Included Desserts, Premium Desserts, Dinner Buffet, Hors D'Oeuvres, Hot, Cold, Snacks, Trays, Desserts, Breaks, Bar, Beverage and Treats, Labor, Packages, Modifiers, A/V Equip, and Equipment. The main area displays a table of menu items. The table has columns for Item Name, Price, Prep Area, Category, and Comment. The first item is 'The Skyway Buffet' with a price of \$18.95, prep area of Hot Line, and category of Breakfast. Below the table is a detailed view of the selected item, 'The Skyway Buffet', showing its description: 'Includes: fluffy scrambled eggs, cheese blintzes, bacon and sausage patties, sliced ham, hashbrown potatoes, fresh fruit, cinnamon rolls, bagels and assorted pastries, chilled fruit juice, coffee, tea or milk'.


Item Name	Price	Prep Area	Category	Comment
The Skyway Buffet	\$18.95	Hot Line	Breakfast	
Lite Start Buffet	\$15.95	Hot Line	Breakfast	
Wyles Breakfast Buffet	\$17.95	Hot Line	Breakfast	
Midwesterner	\$18.95	Hot Line	Breakfast	
Daybreaker	\$15.95	Hot Line	Breakfast	
Morning Delight	\$15.95	Hot Line	Breakfast	
Eye Opener	\$15.95	Hot Line	Breakfast	
The Harbor Buffet	\$15.95	Hot Line	Breakfast	
Wyle's Special	\$15.95	Hot Line	Breakfast	


Description
The Skyway Buffet
 Includes: fluffy scrambled eggs, cheese blintzes, bacon and sausage patties, sliced ham, hashbrown potatoes, fresh fruit, cinnamon rolls, bagels and assorted pastries, chilled fruit juice, coffee, tea or milk

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

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]**.
6. Add a new ingredient by clicking the **Add Ingredient** button , located at the top of the Ingredients List window.
7. Type the ingredient name into the Item Name field, and press **[Tab]** to move to the next field.
8. Enter the Category, Prep Area, Type, and Comment into their respective fields.

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  at the top right-hand side of the window.




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.


The screenshot shows the 'Ingredient Manager' window. On the left is a sidebar with 'Ingredient Menus' including Dairy, Dry Goods, Meats, Seafood, Produce, Baked Goods, Sauces-Oils, Beverages, Soups, and Misc. The main area displays a table of ingredients with columns: Item Name, Category, Prep Area, Type, and Comment. The table lists various dairy items like Cream, Butter, Parmesan Cheese, Eggs, Milk, etc. Below the table is a 'Units' section with 'Item Details' (Item Name: Cream, Revised: 4/19/2018, Unit Type: Volume, Proc. Unit: Pint, Default Unit: Pint, Cost: \$0.89) and 'Item Specific Units' (currently empty with '<No data to display>').

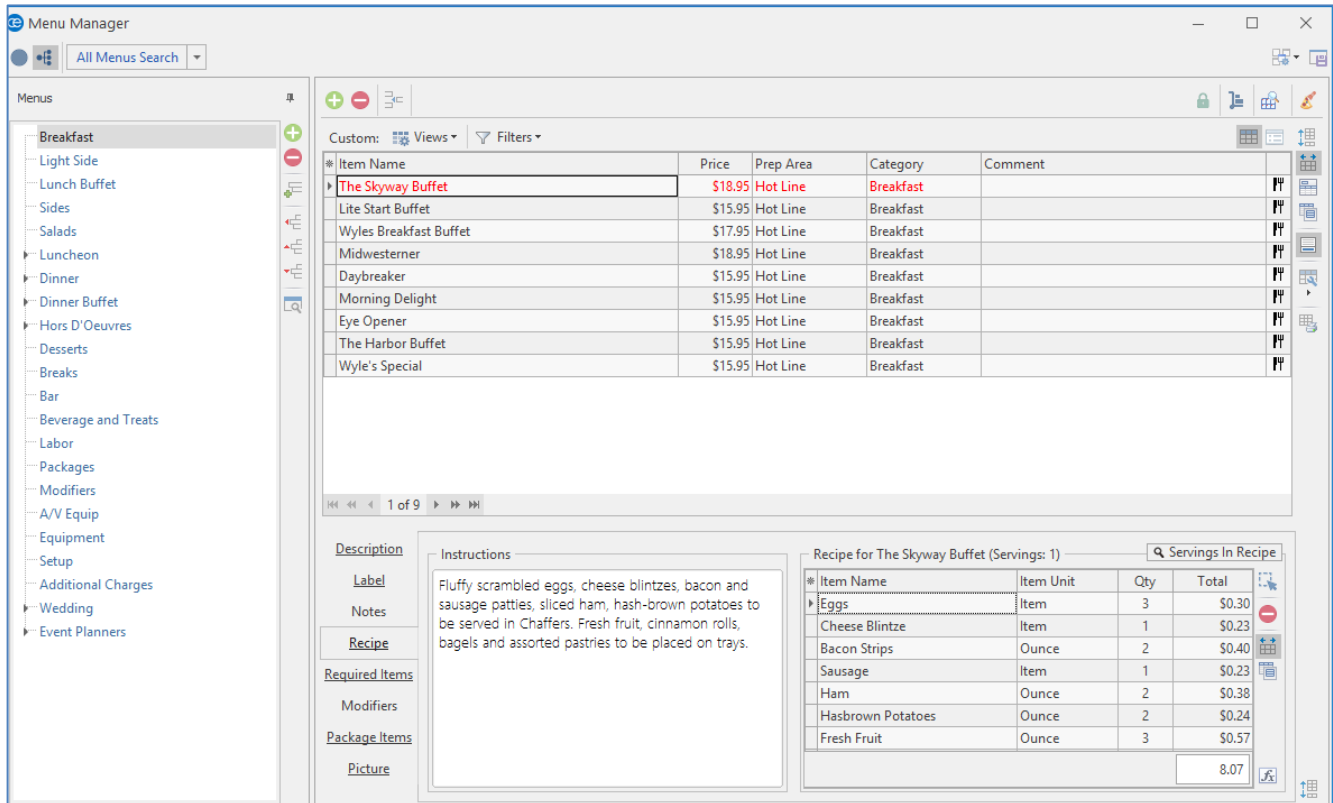
Item Name	Category	Prep Area	Type	Comment
Cream	Dairy		Dairy	
Butter	Dairy		Dairy	
Parmesan Cheese	Dairy		Dairy	
Eggs	Dairy		Entree	
Milk	Dairy		Dairy	
Cream Cheese	Dairy		Dairy	
Assorted Cheeses HD'S	Dairy		Appetizers	
Swiss Cheese	Dairy		Dairy	
Cheddar Cheese	Dairy		Dairy	
Vanilla Ice Cream	Dairy		Deserts	
Chocolate Ice Cream	Dairy		Deserts	
Rainbow Sherbet	Dairy		Deserts	
Sour Cream	Dairy		Dairy	
Cheese Ball (One Pound)	Dairy		Appetizers	
Ricotta Cheese	Dairy		Dairy	

See [http://support.catarease.com/16/helpmenu/Setup/Menu_Manager/Building Ingredients Lists.htm](http://support.catarease.com/16/helpmenu/Setup/Menu_Manager/Building_Ingredients_Lists.htm).

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.
5. Click the **Select Items** button , located on the right-hand side of the window.
6. Highlight and select ingredients.
7. Click into the Qty 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.



The screenshot shows the Menu Manager application window. On the left is a sidebar with a tree view of menu categories: Breakfast, Light Side, Lunch Buffet, Sides, Salads, Luncheon, Dinner, Dinner Buffet, Hors D'Oeuvres, Desserts, Breaks, Bar, Beverage and Treats, Labor, Packages, Modifiers, A/V Equip, Equipment, Setup, Additional Charges, Wedding, and Event Planners. The 'Breakfast' category is selected. The main area displays a table of menu items. 'The Skyway Buffet' is highlighted in red. Below the table, the 'Recipe' tab is active, showing instructions and a list of ingredients with their quantities and prices.


* Item Name	Price	Prep Area	Category	Comment
The Skyway Buffet	\$18.95	Hot Line	Breakfast	
Lite Start Buffet	\$15.95	Hot Line	Breakfast	
Wyles Breakfast Buffet	\$17.95	Hot Line	Breakfast	
Midwesterner	\$18.95	Hot Line	Breakfast	
Daybreaker	\$15.95	Hot Line	Breakfast	
Morning Delight	\$15.95	Hot Line	Breakfast	
Eye Opener	\$15.95	Hot Line	Breakfast	
The Harbor Buffet	\$15.95	Hot Line	Breakfast	
Wyle's Special	\$15.95	Hot Line	Breakfast	

Instructions: Fluffy scrambled eggs, cheese blintzes, bacon and sausage patties, sliced ham, hash-brown potatoes to be served in Chaffers. Fresh fruit, cinnamon rolls, bagels and assorted pastries to be placed on trays.

* Item Name	Item Unit	Qty	Total
Eggs	Item	3	\$0.30
Cheese Blintze	Item	1	\$0.23
Bacon Strips	Ounce	2	\$0.40
Sausage	Item	1	\$0.23
Ham	Ounce	2	\$0.38
Hasbrown Potatoes	Ounce	2	\$0.24
Fresh Fruit	Ounce	3	\$0.57
			8.07

See http://support.caterase.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  at the top right-hand side of the window.



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

Required Items

All Menu Search

Required Item Menus

- General
- Trays and Platters
- Utensils
- Carts
- Tables
- Linen Tablecloths
- Chairs



Custom: Views Filters

Item Name	Packing Unit	Category	Comment	Vendor
Beverage Tub - 7.25 Gallon	Crate	Equipment		
8 Quart Chafing Dish	Crate	Equipment		
Dinner Plate	Case	Tableware		
Napkin	Box	Linen		
Silverware Set	Box	Tableware		
Water Goblet	Crate	Tableware		
Chaffer	Crate	Equipment		
Claw Cracker	Box	Equipment		
Salad Bowl	Case	Equipment		
Salad Plate	Case	Equipment		
Paper Coffee cups	Box	Equipment		
Ceramic Coffee cups	Case	Equipment		
Side Plate	Case	Equipment		
Glass Bowl	Case	Equipment		
Glass Side Plate	Case	Equipment		

1 of 15

See [http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Required Items Lists.htm](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 Default Qty for your required items.
8. Click the **Quick Column Customizing** button  to access additional columns, such as Link, where you can optionally link the quantity of this item to the number of corresponding menu items ordered in an event.



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


The screenshot shows the Menu Manager application window. On the left is a sidebar with a tree view of menu categories: Breakfast, Lunch Buffet, Sides, Salads, Luncheon, Dinner, Dinner Buffet, Hors D'Oeuvres, Desserts, Breaks, Bar, Beverage and Treats, Labor, Packages, Modifiers, A/V Equip, Equipment, Setup, Additional Charges, Wedding, and Event Planners. The main area is divided into two panes. The top pane, titled 'Custom: Views Filters', displays a table of menu items. The bottom pane, titled 'Required Items', shows a table of required items for the selected menu item, 'The Skyway Buffet'.

#	Item Name	Price	Prep Area	Category	Comment
1	The Skyway Buffet	\$18.95	Hot Line	Breakfast	
2	Lite Start Buffet	\$15.95	Hot Line	Breakfast	
3	Wyles Breakfast Buffet	\$17.95	Hot Line	Breakfast	
4	Midwesterner	\$18.95	Hot Line	Breakfast	
5	Daybreaker	\$15.95	Hot Line	Breakfast	
6	Morning Delight	\$15.95	Hot Line	Breakfast	
7	Eye Opener	\$15.95	Hot Line	Breakfast	
8	The Harbor Buffet	\$15.95	Hot Line	Breakfast	
9	Wyle's Special	\$15.95	Hot Line	Breakfast	

#	Item Name	Item Unit	Category	Comment	Default Qty	Link
1	8 Quart Chafing Dish	Each	Equipment		0.08	<input checked="" type="checkbox"/>
2	Dinner Plate	Each	Tableware		1.2	<input checked="" type="checkbox"/>
3	Napkin	Each	Linen		1.2	<input checked="" type="checkbox"/>
4	Silverware Set	Each	Tableware		1.2	<input checked="" type="checkbox"/>

See [http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building Required Items Lists.htm](http://support.caterease.com/16/helpmenu/Setup/Menu_Manager/Building_Required_Items_Lists.htm)

Add Vendors

1. Click the **Setup** sidebar.
2. Click the **Vendor List** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top
4. Enter additional information into each field.
5. Optionally add a Picture, Description, Notes, and Directions.



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

Vendor List: The Laughing Cow

Vendors

Custom: Views Filters

Name	City
The Laughing Cow	Lake Buena Vista
Taylor Rental	Naples
Sysco	Tampa
Premium Beverage	Sarasota
Marcel Bakery	Fort Myers
Katies Flowers	Ft Myers
Incredible Fresh	Naples
In House	
Grand Western Beef	Pompano
Captain Jerry	Miami

Enter text to search... Find Clear

1 of 10

Vendor Details

General

Name: The Laughing Cow

Address: 35 Ardisia Road

City: Lake Buena Vista

St/Prov: FL Postal: 32568

Telephone: (505) 665-6252 Cellular: (505) 821-8118

Category: Long Distance - 3 Day Notice

Website: <http://www.thelaughingcow.com>

Contact: Hamilton, Joseph

Last: Hamilton First: Joseph

Title: Office Manager

Salutation: Joe


Email: joe.hamilton@thelaughingcow.com

Description Directions Picture Notes

See <http://support.caterease.com/16/helpmenu/Event Manager/Printing Menu Item Vendor Lists.htm>

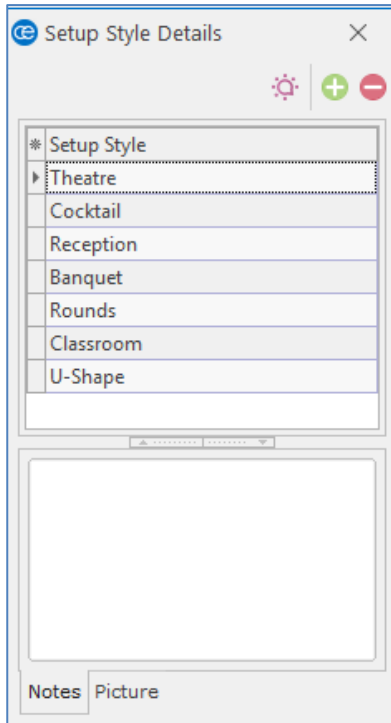
Room/Venue Customization

Add a Master List of Setup Styles

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




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

Create Locations to Group Your Rooms (Optional)

1. Click the **Administration** ribbon tab.
2. Click the **Venues** button and choose **Banquet Rooms Setup**.
3. Click the **Add Location** button , located at the top left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type a name for your new location.
6. Optionally 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>

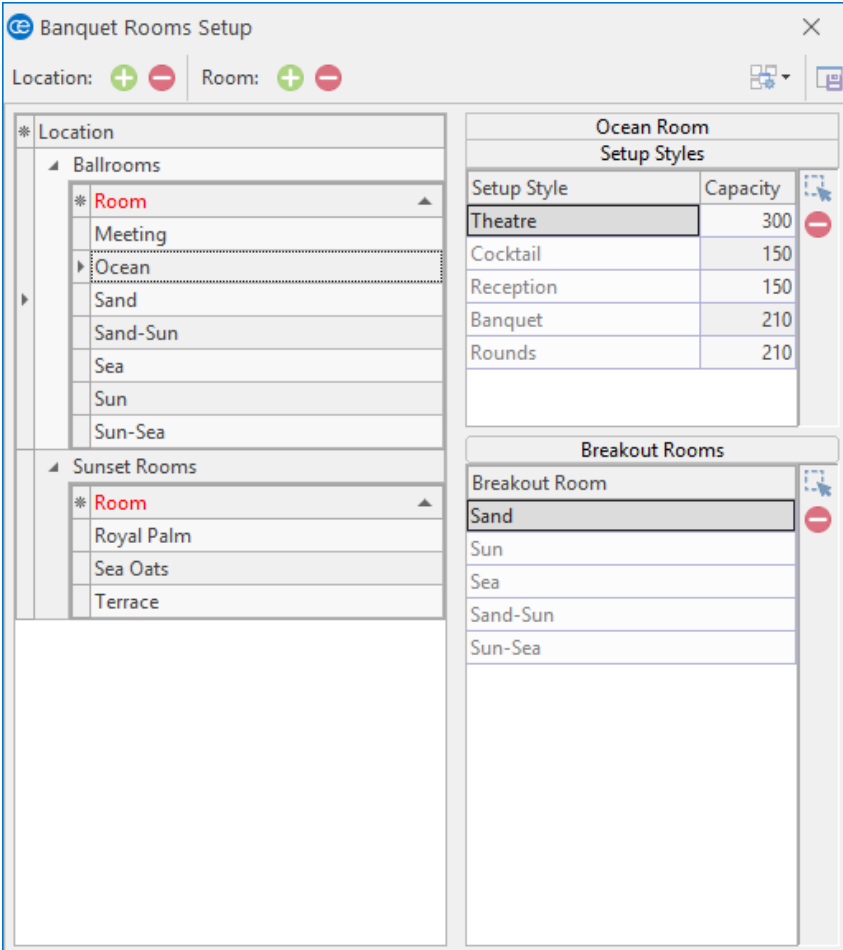
Add Banquet Rooms to Your Locations

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.
4. Click the **Select Setup Style** button , located on the upper right-hand side of the window.
5. Double-click on the name of the setup style to select.
6. Type the room capacity into the Capacity field.



Banquet Rooms Setup

Location:   Room:  

*** Location**

- Ballrooms
 - * Room
 - Meeting
 - Ocean
 - Sand
 - Sand-Sun
 - Sea
 - Sun
 - Sun-Sea
- Sunset Rooms
 - * Room
 - Royal Palm
 - Sea Oats
 - Terrace

Ocean Room Setup Styles

Setup Style	Capacity
Theatre	300
Cocktail	150
Reception	150
Banquet	210
Rounds	210

Breakout Rooms



Breakout Room

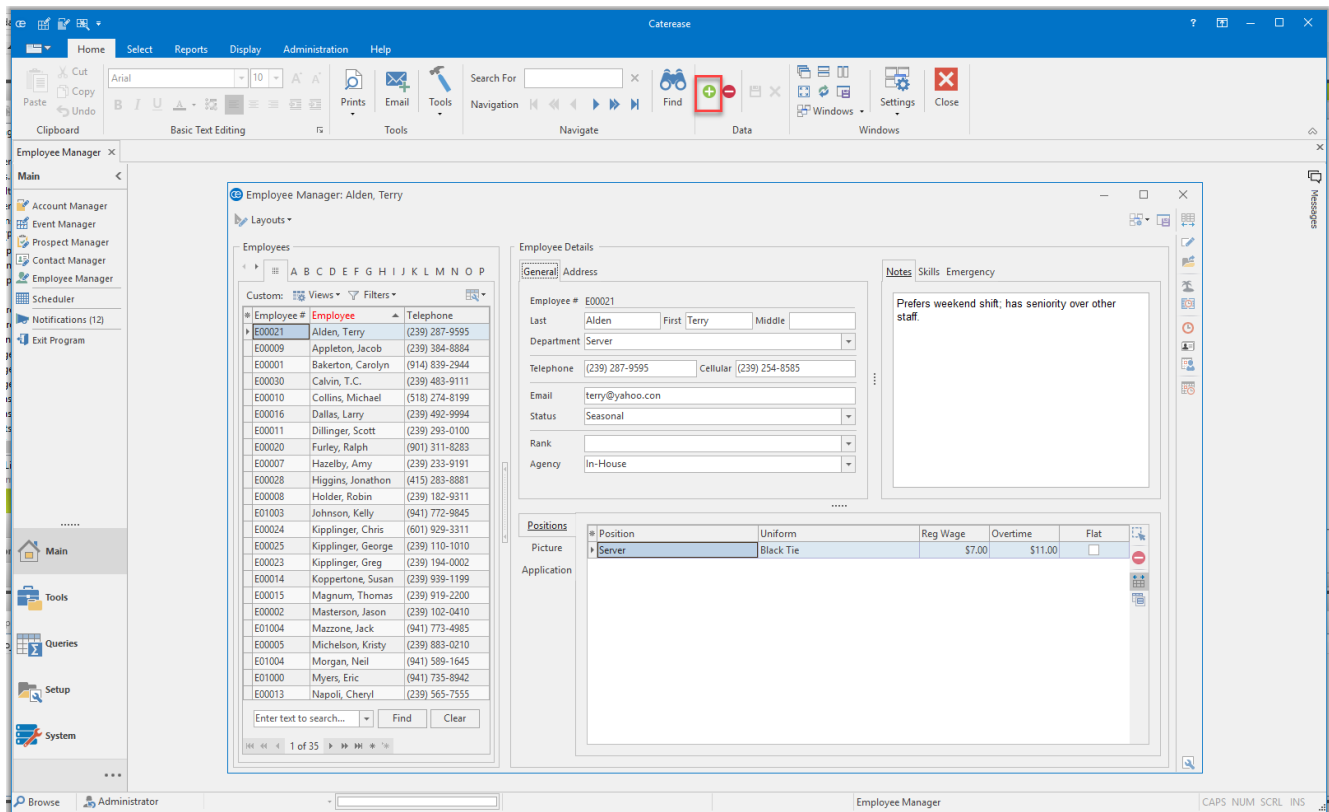
- Sand
- Sun
- Sea
- Sand-Sun
- Sun-Sea

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

Staff/Position Setup/Customization


Add Employees

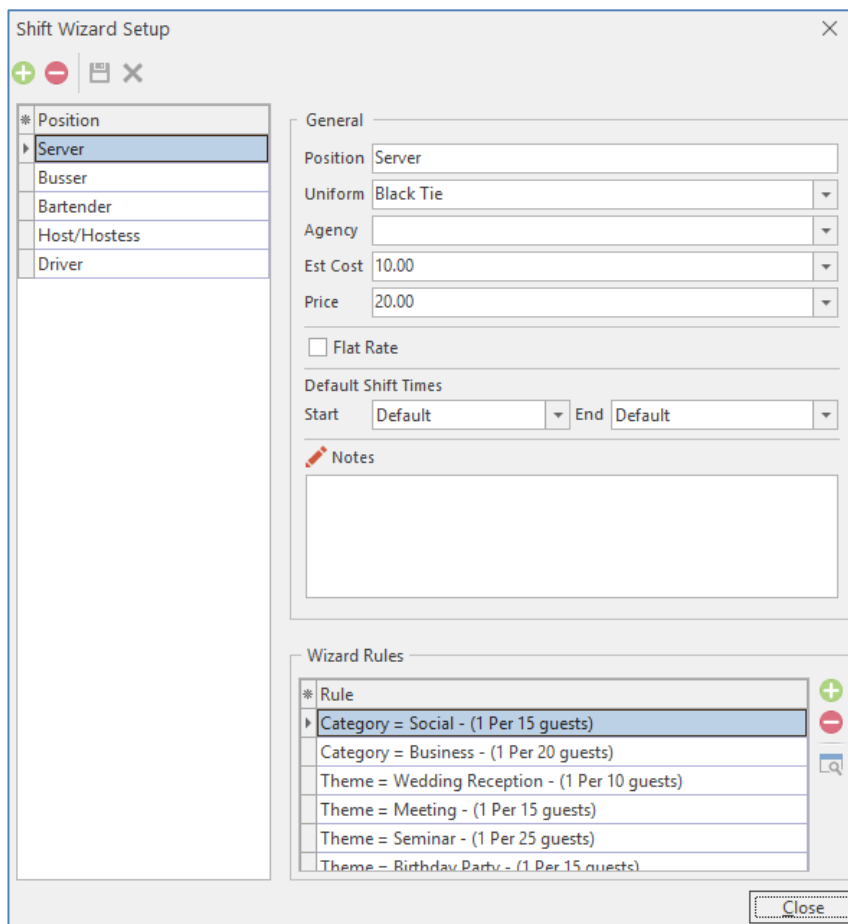
1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of the screen.
4. Click **Yes** at the confirmation prompt.
5. Type the employee's last name into the Last field, and press **[Tab]** or **[Enter]**.
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 Home Address and Mailing Address fields.
8. When finished, click the **Save Changes** button , located in the **Home** ribbon tab.



See http://support.caterase.com/16/helpmenu/Setup/Employee_Manager/Creating_a_Default_List_of_Employees.htm

Add Positions




1. Click the **Main** sidebar.
2. Click the **Employee Manager** button.
3. Click the **Tools** button and select **Shift Setup**.
4. Click the **Add Position** button , 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 Position field.
7. Optionally complete the Uniform and Agency fields.
8. Optionally enter an Estimated Cost (Wage) into the Est Cost field.
9. Click into the Price field and type a default price (per hour) for the shift.
10. Optionally click into the Flat Rate checkbox to designate the shift as a flat rate.
Note: Flat rate is used as an alternative to hourly rate.
11. Optionally select the Default Shift Times 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 Notes text block.
13. Click the **Close** button.

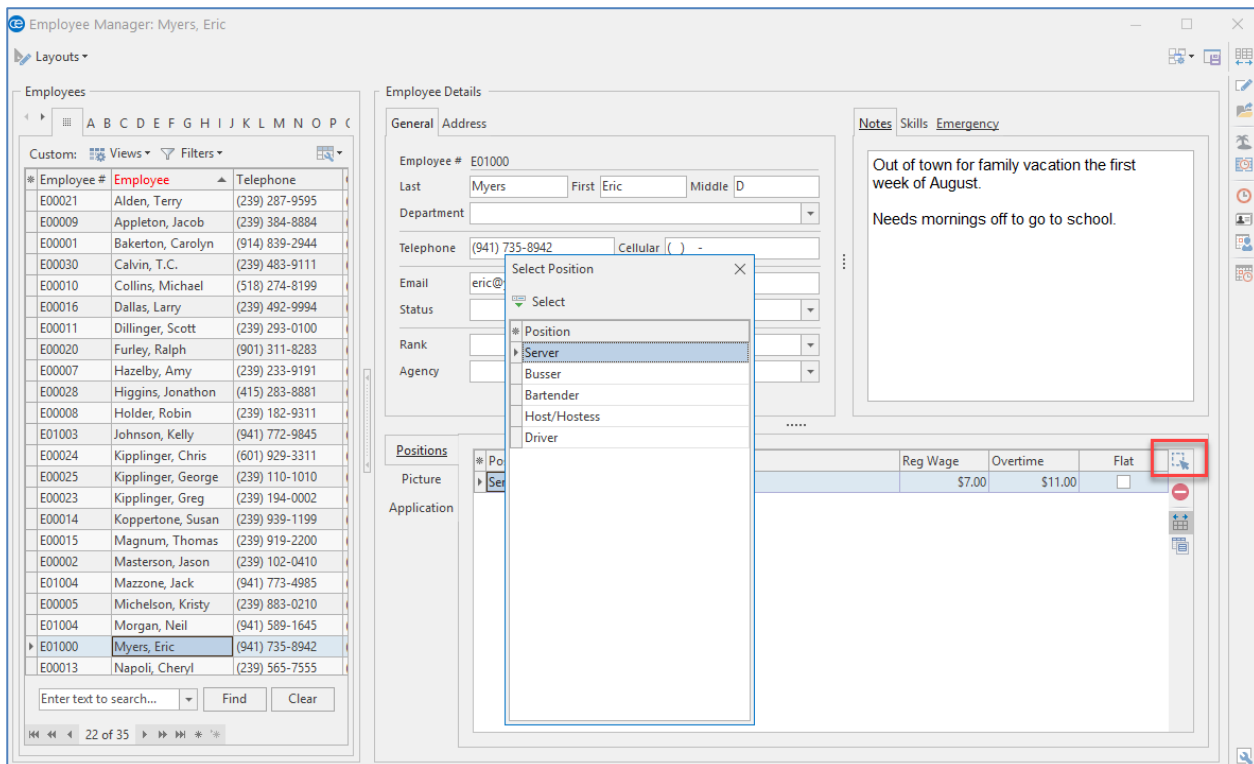


The screenshot shows the 'Shift Wizard Setup' window. On the left is a list of positions: Position, Server (selected), Busser, Bartender, Host/Hostess, and Driver. The main area is divided into sections: 'General' with fields for Position (Server), Uniform (Black Tie), Agency, Est Cost (10.00), and Price (20.00); a 'Flat Rate' checkbox; 'Default Shift Times' with Start and End dropdowns (both set to Default); a 'Notes' text area; and 'Wizard Rules' with a list of rules including 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), Theme = Seminar - (1 Per 25 guests), and Theme = Birthday Party - (1 Per 15 guests). A 'Close' button is at the bottom right.

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 , 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 , located in the **Home** ribbon tab.



See http://support.catrease.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**.

tip 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

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

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 http://support.caterease.com/16/helpmenu/Setup/Marketing_Tools/Creating_New_Merge_Documents.htm

Import Prospects/Accounts

http://support.caterease.com/16/helpmenu/Prospect_Manager/Importing_a_List_of_Prospects.htm

http://support.caterease.com/16/helpmenu/Account_Manager/Importing_Customers_into_Account_Manager.htm

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