caterease
catering + event planning solution

Training Guide

Booking Your First Event

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Unit 1: Adding a New Event

When you need to add an event to Caterease, the first thing you will want to ask yourself is whether or not you've done business with that customer before. Why is that so important? Because if you have already entered a client's name and information into Caterease, you never have to type it again; you simply quickly retrieve that client's details and continue booking the event.

This section discusses booking an event for a brand-new customer (someone with whom you have never done any business). However, most of the steps outlined here are the same steps you'd follow to add an event for an existing customer.

Use this guide to better understand the various details available in Event Manager, and how you can easily fill in those details.

Objectives:

Upon completing this unit, you will be able to:

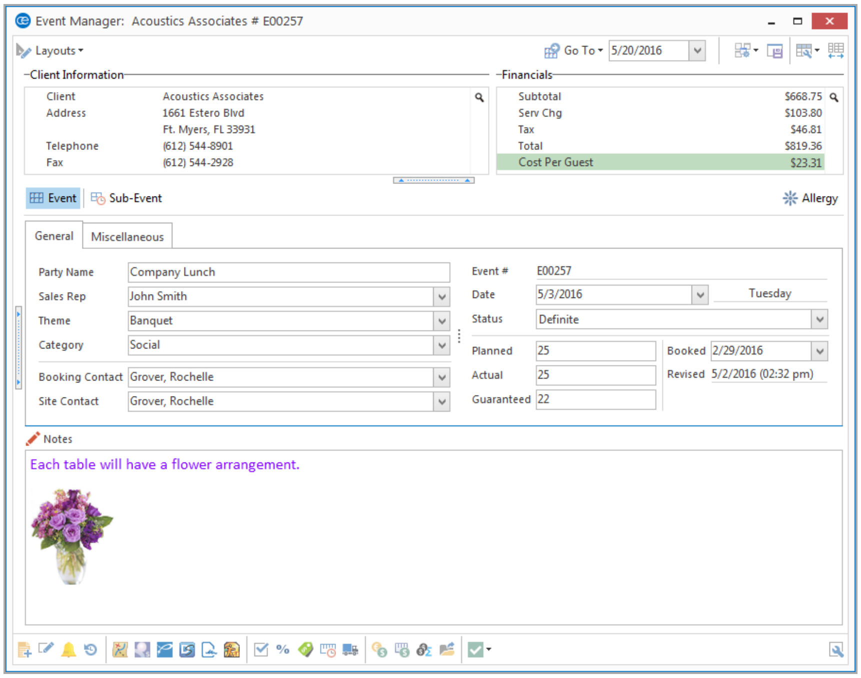
- *Add a new event in Event Manager.*
- *Add a new customer for your new event.*
- *Select a default contact person for a new event.*
- *Use data entry tools to enter general event details.*

Event Manager Introduction

The Event Manager is the heart of the Caterease program. This is the place to go when you want to review an existing event in detail, modify an existing event, or add a new event. You can also generate numerous prints from Event Manager, including the Contract, Invoice, or Banquet Event Order (BEO) for a particular event. Even if you choose to add a new event using the Event Wizard (discussed later in this guide), the process will ultimately lead you to the Event Manager screen.

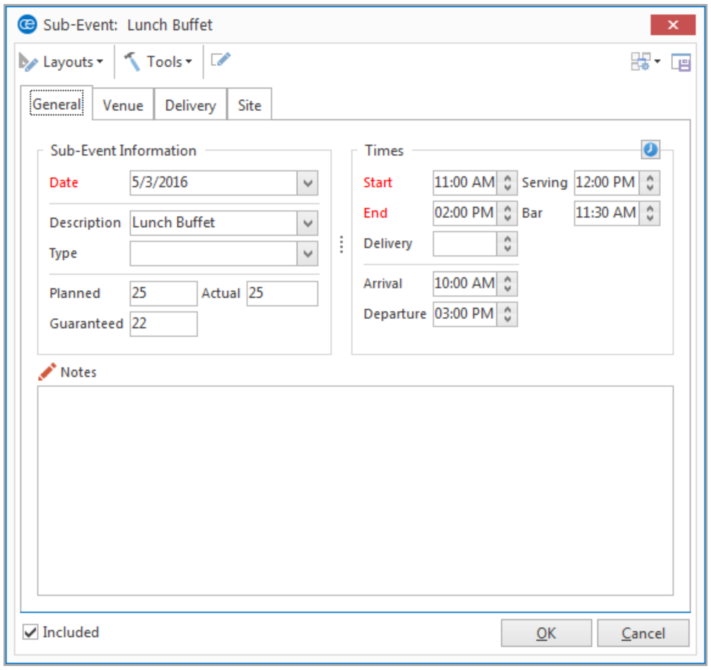
The Event Manager has two main displays: Event and Sub-Event. The Event display allows you to view or edit any general event information, such as party name, theme, guest count, event date, etc. The Sub-Event display allows you to enter more specific event details, such as event times, event venue, food and service items, staffing, etc.

As with the other "Managers" in the program, the Event Manager makes use of the main Caterease toolbars at the top of the screen. Buttons on these toolbars allow you to add or delete events, search for a particular event, navigate quickly from one event to another, and perform a host of other powerful tasks. You can even generate a print of the Manager screen you are viewing or access the program's on-board Help menu for assistance.



Viewing the Event Manager Sub-Event Display

Every event has at least one sub-event, which contains the specifics (times, menu, function, space) of that event. In other cases, a sub-event is just what it sounds like: a small part of a larger event. For example, you might have an all-day function that is made up of, say, three sub-events: a “breakfast,” a “lunch,” and a “dinner.” Or, you may have a single function that takes place over multiple days, and each day could be an individual sub-event. Since you can rename the term “Sub-Event,” as it appears in Caterease, as anything you want, you might also use this feature to create multiple proposals for an event.



Building a Menu

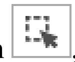
Menu items for an event are added on the Food/Service tab of the Sub-Event display in Event Manager. This is basically the "money tab" for the event. For the most part, if an item is not included on this tab, then the customer is not getting charged for it. (Exceptions include the room charge and delivery charge.)

There are a couple of concepts to consider when adding a menu to an event. First of all, you may want to select common menu items from your program's pre-defined, customizable menus. Remember, it's an important motto in Caterease that you should never have to type the same thing more than once. Therefore, menu items that are requested over and over again can quickly be retrieved into an event instead of being constantly retyped.

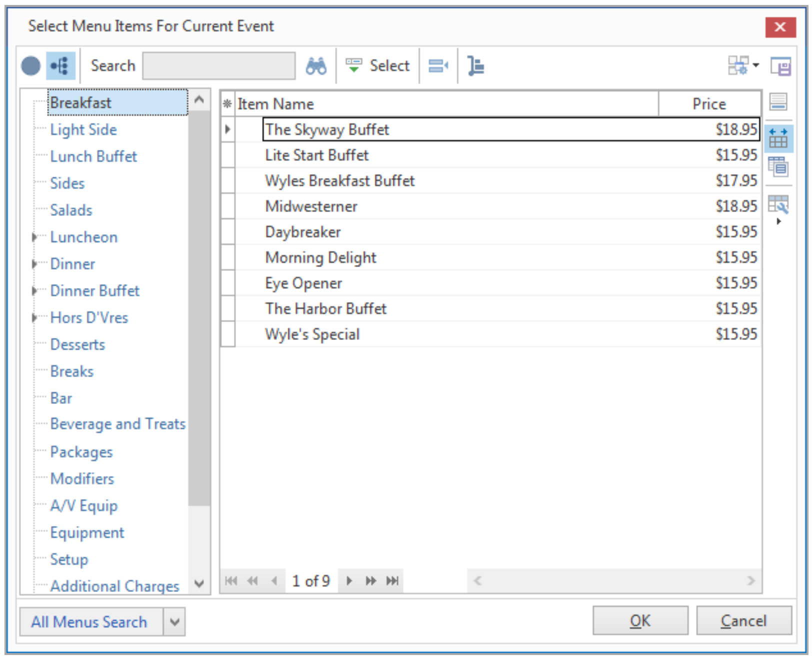
In addition to retrieving common items, however, you will also likely require the ability to create unique, custom menu items on-the-fly from within an event. This is done quickly and easily on the Food/Service tab, as well.

One final thing to note with respect to your Event Manager's Food/Service tab: While you may certainly rename the tab, its default name indicates that it is not merely used for food and beverage items; service items, too, including audio-visual equipment, labor charges, etc., should be included here. Simply stated, anything the customer is paying for should be listed on the Food/Service tab.

Retrieving Menu Items from Default Menus

1. Click the **Display Menus** button , located on the right-hand side of the Sub-Event display.
   Result: *The Select Menu Items window opens.*

2. On the menu selection window, click a menu title in the left pane.



3. Highlight and select items from the main list on the window.

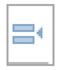
4. When finished, click **OK**.

Adding a Custom Menu Item to an Event

1. In Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.
   Result: *The Event Manager switches to the Sub-Event display.*

2. Select a sub-event (if there are more than one) to which to add a menu item.
   Note: *The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. If there are many sub-events, a scroll bar at the right of the pane and a navigation bar below the pane will be available to scroll through the sub-events.*

3. Click the **Add A New Food/Service Item** button , located on the right-hand side of the **Food/Service** tab.
   Result: *A new blank line is added to your **Food/Service** tab.*
   Note: *As an alternative, you can click the **Insert A New Food/Service Item***

button  *at the right-hand side of the **Food/Service** tab to insert a new blank line ABOVE the menu item currently selected in the grid.*

4. Click into the **Item Name** column of the **Food/Service** tab and type a name for the new menu item.

5. Press your **[Enter]** key.
   Result: *Your information is stored and your cursor moves to the next column.*

6. Type a price for the item and press **[Enter]**.
   Result: *Your cursor moves to the next column.*
   Note: *Rather than typing a price, you can click the down arrow at the right of the **Price** column to access the drop-down calculator.*

7. Type the appropriate quantity for the menu item.
   Note: *A drop-down calculator is available for this field, as well.*
   Note: *If, when you clicked the **Add A New Food/Service Item** button in Step 3 (above), you had a menu item highlighted whose quantity was linked to the party's guest count, your new item will default to being linked as well. Right-click the item and choose **Special Editing** > **Link/Unlink Qty to Guest Count** to unlink it.*

8. Click into the column with the small image on the far right of the Food/Service grid and click the down arrow to choose the appropriate **Item Type** for the new item.
   Note: *The "Item Type" of new items defaults to the Item Type of whatever item was highlighted when you clicked the **Add A New Food/Service Item** button in Step 3, above. "Item Type" is a hard-coded list; however, "Category" is a custom list that can be used to further classify items.*

9. **[Optional]** Hold your left mouse button down on the new item you have added and drag it up or down to a different position in the list.
   Note: *You cannot drag an item that you are currently editing; if you have difficulty, try clicking another item and then hold your mouse button down on the original item you want to drag.*

10. **[Optional]** Create a detailed "Description" for the new item.

Unit 2: Using the Event Wizard

Let’s explore a quick and easy alternative: the Event Wizard. This option lets you add a new event in three easy steps: selecting an account (and optional contact person), entering basic details, and retrieving menu items.

You can access the Event Wizard from within your Event Manager screen, or you may click the Event Wizard button on the **Tools** sidebar on your Main screen. (If you have the Professional or Standard version of Caterease, you can even add a new event from the Event Scheduler.)

Objectives:

Upon completing this unit, you will be able to:

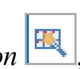
- *Add an event with the Event Wizard.*
- *Fill in general event details in the Event Wizard.*
- *Enter off-premise site location information.*
- *Complete the new event in Event Manager.*

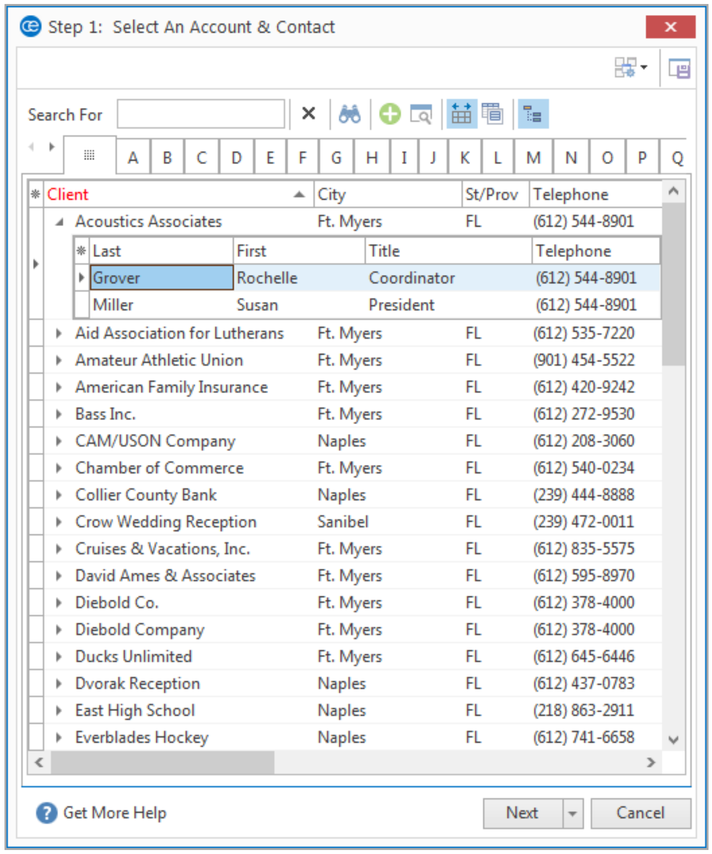
Event Wizard, Step 1: Selecting a Client

When booking an event using the Event Wizard, the first step is choosing or adding the customer. You can quickly search through your existing customers by name, or use a Finder tool to search based on any client detail. Or you can optionally 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 the screen.
2. Click the **Event Wizard** button.
   Result: *The Event Wizard tool opens on the Select An Account & Contact window.*

   Note: *You can also access the* ***Event Wizard*** *button* , *located at the top* *left-hand corner of your screen.*



3. Click into the **Search For** tool at the top 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 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 drop-down list under the client name.

5. When finished, click **Next** at the bottom right of the Wizard tool to move to 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.

Using the Account Finder Tool

1. Click the **Search Records** button (binoculars) on the ribbon tab at the top of the Select An Account & Contact window (Step 1).
Result: *The Account Finder tool 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. Many fields, such as Category, Reference, Description, etc., have a corresponding drop-down list to the right of the field.*

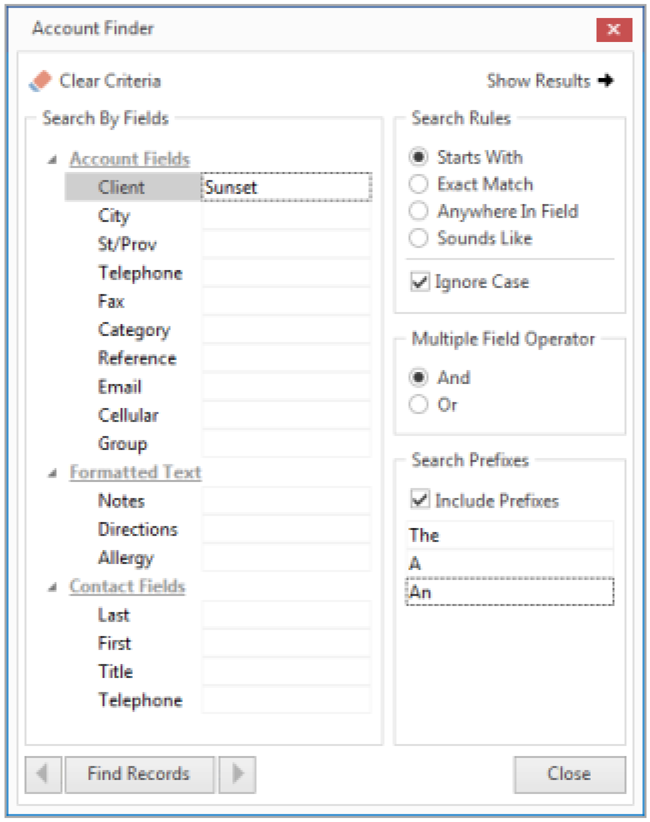
3. In the Search Rules field, select the appropriate rule.
   Note: *Confirm that* ***Ignore Case*** *is selected if you want to ignore capitalization when you enter your text.*

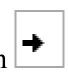
   - **Starts With** - The field you chose in the **Search By Fields** area starts with the words or letter you typed.
   - **Exact Match** - The field you chose in the **Search By Fields** area contains exactly the words you typed and nothing else.
   - **Anywhere in Field** - The words or letters you 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 Fields** 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 the **Include Prefixes** checkbox and then type the prefix (a, an, the) into the fields within the **Search Prefixes** section to include prefixes in your search.

6. Click the **Find Records** button, located at the bottom of the window.



7. **[Optional]** Click the **Show Results/Hide Results** button  at the top right of the Account Finder to display a list of all records your search has found 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.*
   Note: *Click the* ***Clear Criteria*** *button, after you have run a search, to clear all results and begin again.*

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

11. **[Optional]** Click the expand button to the left of the client name and select a default contact person for the new event.

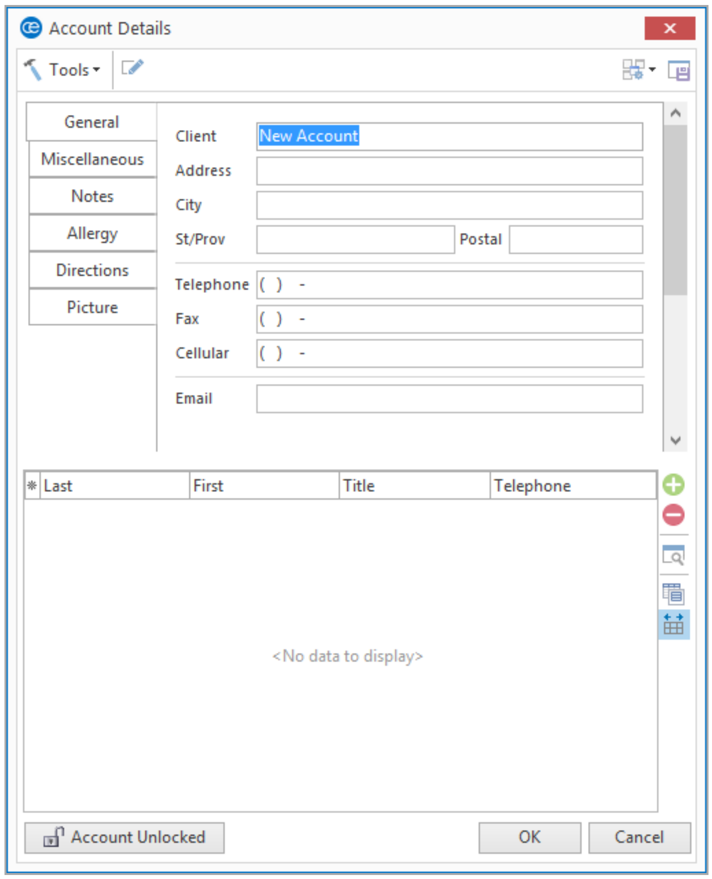
__Tip:__ Click the __Auto Expand Contacts__ button, located in the toolbar at the top of the Select An Account window, to automatically display the account's contacts.

12. When finished, click **Next** at the bottom right of the Wizard tool to move to 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. At the top of Step 1 of the Event Wizard, click the **Add New Account** button .
   Result: *A confirmation prompt appears.*

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



3. Enter a name in the Client/Organization field, and press your **[Enter]** key.
   Result: *Your cursor moves to the next field.*

4. Fill in additional account information as desired by typing 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 return 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 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.

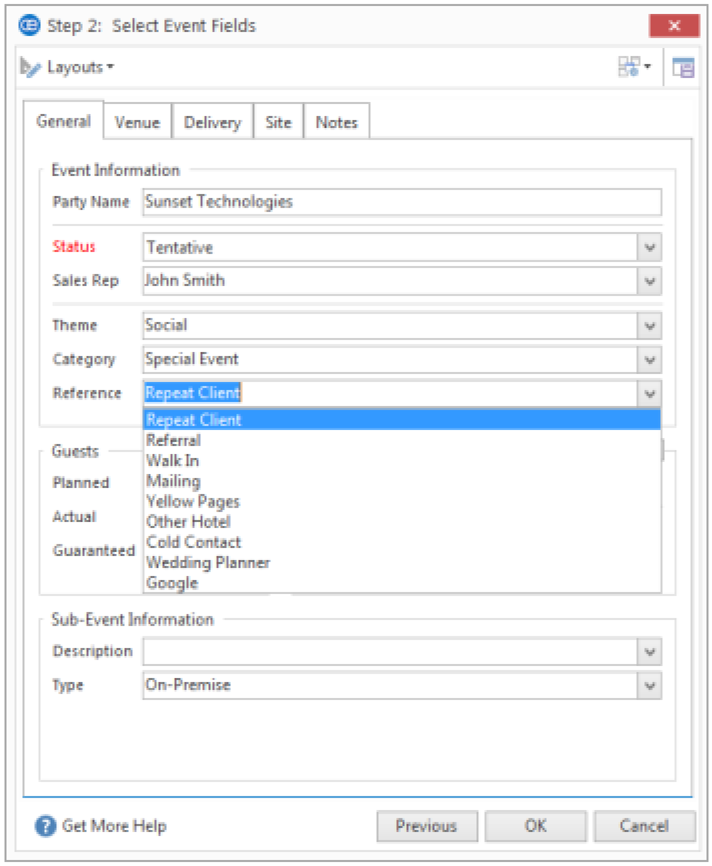
Event Wizard, Step 2: Entering Event Details

The second step of the Event Wizard has you filling out the basic details of your new event. This entire screen 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.

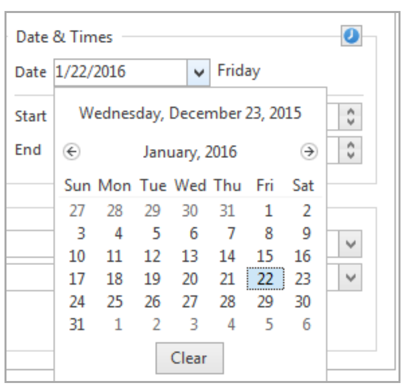
Entering General Details

1. Enter details into simple text fields such as Party Name, guest fields, field, etc., by simply typing into the fields as desired.

2. Click the down arrow to the right of various fields to use available drop-down lists ("quickpicks"), when applicable.



3. Enter a date by either typing into the Date field or using the drop-down calendar.
__Note:__ Professional version users can enter words such as "Tomorrow," "Monday," or even "EOM" ("End of Month") or "EOM+1" in lieu of dates.



4. Enter times for the new event either by typing directly into time fields, or by clicking the **Time Wizard** button and dragging and dropping times into position.

Important Note: "Setup" and "Tear Down" time fields (located on the **Venue** tab) 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," till its "End" time plus any "Tear Down."

5. **[Optional]** For on-premise parties, click the **Venue** tab and select a "Setup Style" and "Banquet Room" for the event.
   Note: *The list of Banquet Rooms will show the maximum guest capacity for each room based on your chosen setup style. Any room highlighted in red does not use the selected setup style. As an option, click the* ***Room Selection*** *button to the right of the Room field to have Caterease determine the best room for the event. (Available with the Rooms Module.)*

Tip: *The time and venue 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 bring you into Event Manager.*

6. **[Optional]** For off-premise parties, click the **Site** tab and enter site information including Name, Address, etc., or click the **Select Site Location** button to select from your list of commonly used locations.
   Note: *You can also click the* ***Copy from Client*** *button to select the client's address as the site.*
7. Enter text into large text blocks (Notes, Directions, Setup Notes, etc.), by typing - optionally formatting text by highlighting, clicking your right mouse button, and choosing **Font**.
   Note: *You can insert images or current date and time by right-clicking within a text box and choosing* ***Insert****.*
8. When finished, click **OK**.
   Result: *Your new event is created and opened in Event Manager, and you are prompted to move on to selecting menu items.*

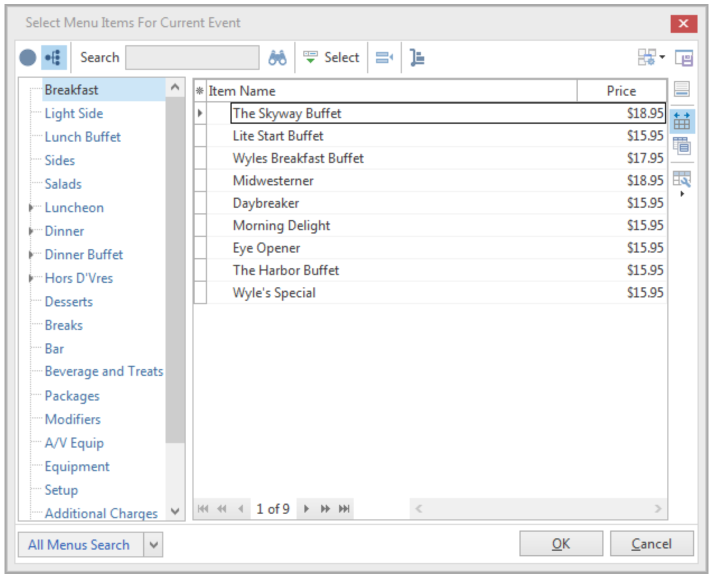
Step 3: Entering Menu Details

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 describe how.

Selecting Menu Items for the New Event

1. After completing Step 2 of the Event Wizard, click **Yes** on the information message in your new event.
   Result: *The Menu Selection window opens.*
   Note: *If the confirmation message is no longer visible, click the* ***Display Menus*** *button, located on the right-hand side of the Sub-Event display.*

2. On the menu selection window, click a menu title in the left pane.
   Result: *Items in the selected menu are displayed in the main pane of the window.*



3. Highlight the items you want and retrieve them in one of the following ways:

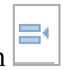
   - Double-click a single item in the Select Menu Items window.
     Result: *The selected item is inserted at the bottom of your event's* ***Food/Service*** *tab, and the Select Menu Items window remains open.*

   - Hold your mouse button down on one individual item (without moving) for a half-second and drag that item from the Select Menu Items window onto your **Food/Service** tab.
     Result: *The selected item is inserted at the bottom of your event's* ***Food/Service*** *tab, and the Select Menu Items window remains open.*

   - Hold your left mouse button down on a group of selected items and drag and drop them onto the **Food/Service** tab.
     Result: *The selected items are inserted at the bottom of your event's* ***Food/Service*** *tab, and the Select Menu Items window remains open.*
     Note: *Select a group of items by dragging your mouse over them, or holding the* ***[Shift]*** *or* ***[Ctrl]*** *key down on your keyboard as you click.*

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

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

- Click the **Insert Mode** button  to retrieve menu items in specific positions on the **Food/Service** tab 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*** *tab (rather than always at the bottom); when dragging and dropping,* ***Insert Mode*** *allows items to be dropped anywhere at all on the* ***Food/Service*** *tab.*
  Note: *Items can also be dragged and dropped up and down in the menu on the event's* ***Food/Service*** *tab, as well, regardless of the* ***Insert Mode*** *feature.* ***Insert Mode*** *can be enabled as a default by clicking enabling it once and clicking the* ***Save Window Settings*** *button* .

Unit 3: Emailing an Event Contract

The Caterease Print Designer allows you to create any number of custom event prints, give them any titles you want, and modify them to suit your needs. Therefore, what constitutes a "contract" in your program may only vaguely resemble the "contract" in somebody else's.

In this unit, we will learn how to print a contract for an event. Whether your contract is similar to the example used here — or whether or not you call your print a "contract" at all — is irrelevant to the lessons on the next few pages. Whatever the print is that you might want to generate from Event Manager, it can be done using the steps you're about to learn.

In addition, you'll also discover how any print in the program can quickly and easily be e-mailed to a client. In doing so, we are going to briefly demonstrate the power of the Caterease Marketing Tools Package, which is an add-in to the base program and thus you may not own it. This feature can be easily added to your program at any time by simply calling our Sales Desk (800.863.1616).

Objectives:

Upon completing this unit, you will be able to:

- *Generate a print preview of an event's contract.*
- *Attach that contract as a PDF file to an e-mail.*

Emailing an Event Print

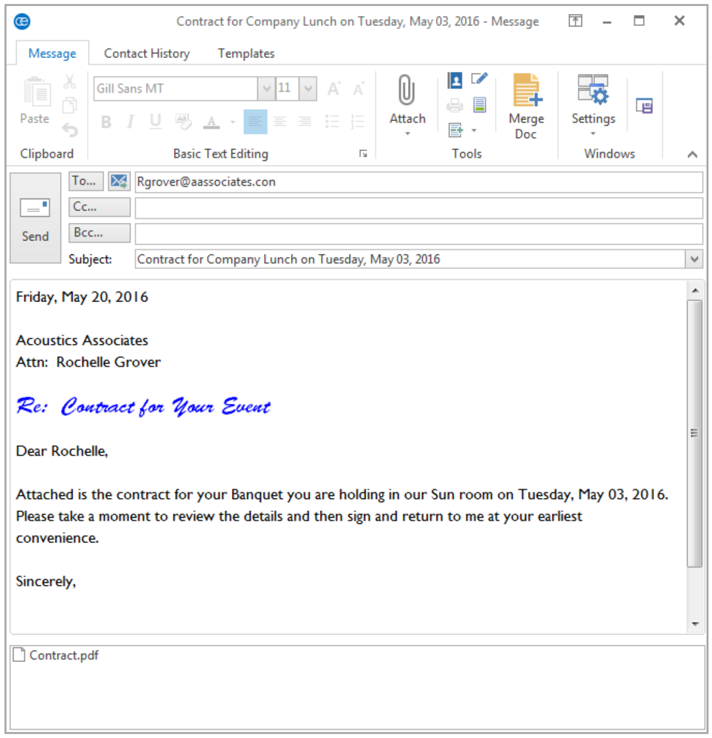
You can quickly e-mail a print directly from the Print Preview screen.

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

E-mailing an Event Print

1. From an event in Event Manager, click the **Home** ribbon tab and 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 semicolons.

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

8. Click into the large white text block 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 of the screen. 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.

Unit 4: Adding Payments to an Event

Once an event has been booked in Caterease, all of its financial information can be tracked. This includes, of course, the sales numbers of the event — but also the amount paid, upcoming deposits due, and outstanding balance.

There is a significant conceptual difference between event payments and event deposits in the program. Payments refers to money that has been received; deposits are money that is due to be paid in the future. For example, you may allow your customers to pay a balance off in multiple installments. Thus, you can schedule all of these future deposits and their due dates, and then you can log each payment as you receive it. This section focuses on payments received, as well as identifying the other useful features available to you in the toolbar at the bottom of the Event Manager screen.

Objectives:

Upon completing this unit, you will be able to:

- *Add payments received to an event.*
- *Edit an existing payment.*
- *Apply payments to an account.*

Adding an Event 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 at the bottom 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.*

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 or click the down arrow to access the drop-down calculator.*

5. Select a Payment 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).*

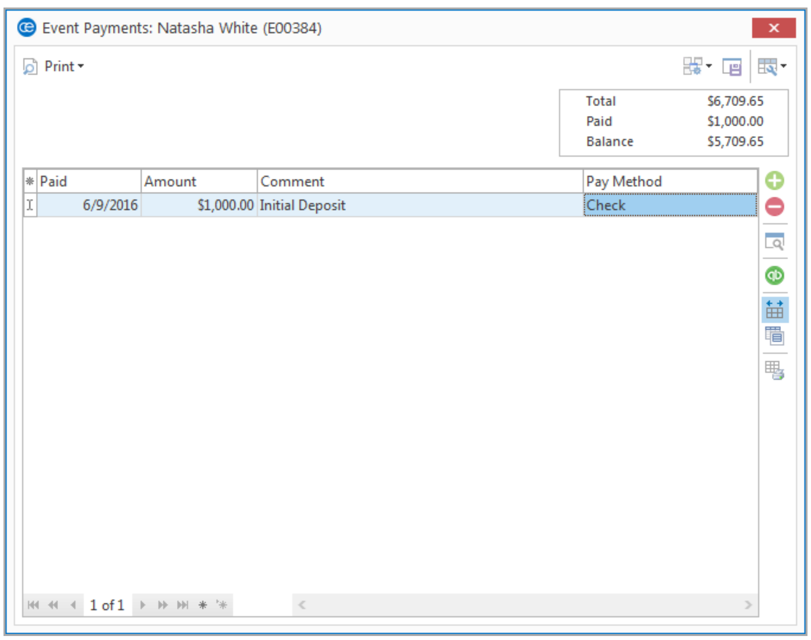
6. Optionally enter a Category or choose a category from the drop-down quick-pick list.
   Note: *Examples of comments might include "Initial Deposit," "Final Payment," etc.*

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 on the Event Payments window.*

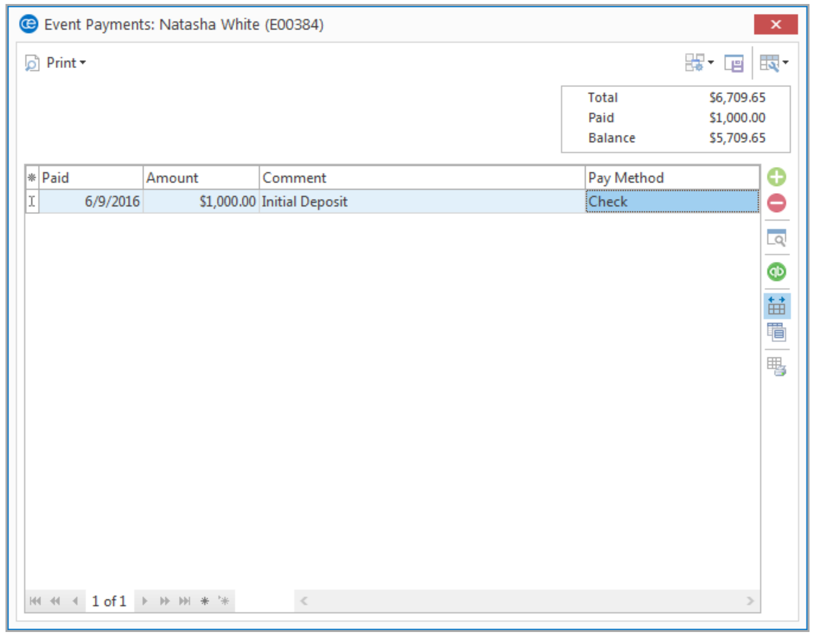


11. Click the , located at the upper right-hand side of the window, to close the Event Payments window.

Editing an Existing Event Payment

1. Click the **Payments Made** button

, located at the bottom 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 on the Event Payments window.

3. Click the **View/Edit Payment Details** button .
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 , located at the upper right-hand side of the window, to close the window.

Applying Payments to an Account

1. In Account Manager, locate the account for which you want to process payments.

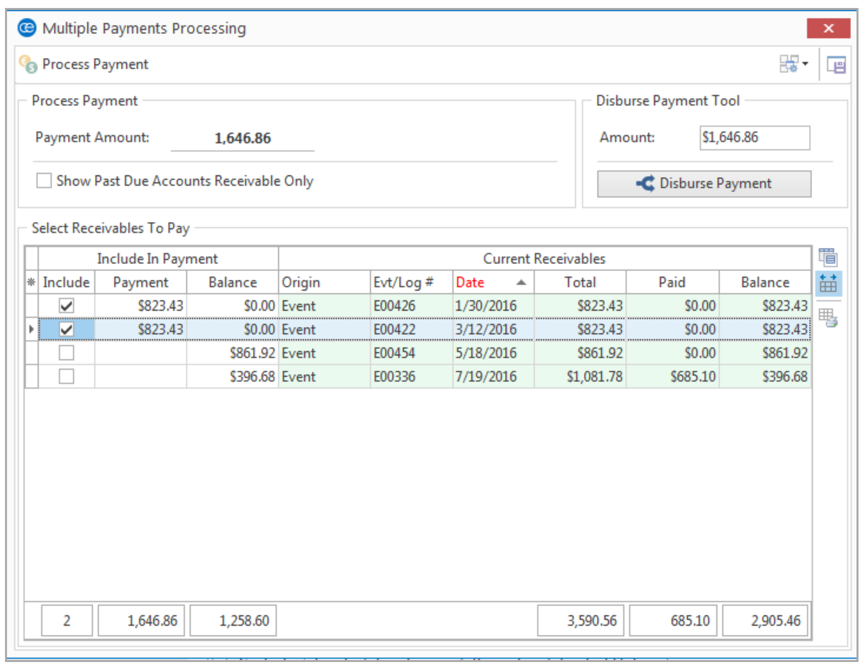
2. On the toolbar at the bottom of Account Manager, click the **Apply Payments** button , or access it from the **Tools** button at the top of your screen, depending on your personal configuration.
Result: *The Multiple Payments Processing window opens, listing all events with outstanding balances.*

3. Click into the **Include** checkbox next to the event or events you would like to disburse a payment to.
   Result: *The Payment Amount field automatically updates.*

4. Enter the payment amount into the Amount field, located on the upper right-hand side of the window.

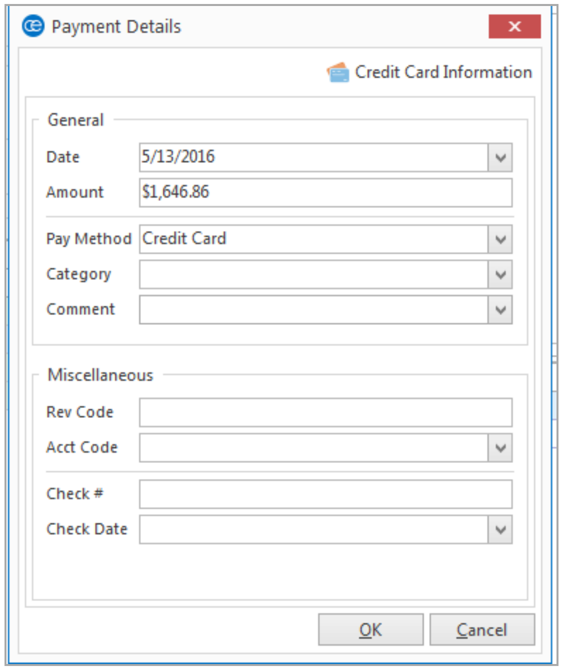
5. Click the **Disburse Payment** button, located on the upper right-hand side of the window, below the Amount field.
   Result: *A confirmation prompt appears.*

6. Click **Yes** to confirm.
   Result: *Caterease will divide the payment appropriately and will display any remaining balance after disbursing.*

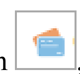


Tip: *Adjust the payment amount by clicking into the Amount field and typing in a different amount.*

7. Click the **Process Payment** button, located on the upper left-hand side of the Multiple Payments Processing window (shown above).
   Result: *The Payment Details window opens.*



8. On the left-hand side of the Multiple Payments Window, enter payment information (Amount, Pay Method, etc.).
   Note: *The payment date will default to the current date; however, the date can be changed if desired. Data-entry tools are available, such as a drop-down calculator to enter payment amount, and quickpick lists for Pay Method, Category, Comment, and Acct Code.*

9. **[Optional]** Click the **Credit Card Information** button , located at the top right-hand side of the window, and enter the credit card information of the payment.
   Note: *If credit card information has been stored with the contact person's information, click the **Select Credit Card** button*  *and contact (not available if Credit Card Processing is enabled).*

10. When finished, click **OK**.
    Result: *Each event will reflect the payment amount you entered into the Amount field, and the balance will display on the Multiple Payments Processing window.*

Unit 5: Adding Staffing and Comments to an Event

In addition to the Food/Service tab, there are two other tabs available on the Event Manager's Sub-Event display: the Staffing tab and the Comments tab.

The Staffing tab allows you to select employees for the event, including waiters, waitresses,bartenders, bus people, etc. The Start and End times you have entered for the sub-event will default as the Start and End time for each employee, although you can change that, if you want. The program will automatically calculate total wages based on employee information that you are free to set up and modify. You can also generate employee schedules and reports and customize queries.

The Comments tab offers a large text block into which you can type any amount of free-flowing text, representing any special requests or comments pertaining to the sub-event. Commonly used text can be instantly copied from the program's customizable Scratch Pad, and comments can optionally be included on your various event prints.

Objectives:

Upon completing this unit, you will be able to:

- *Retrieve staff members into an event.*
- *Customize the Staffing Grid.*
- *Add Sub-Event comments.*

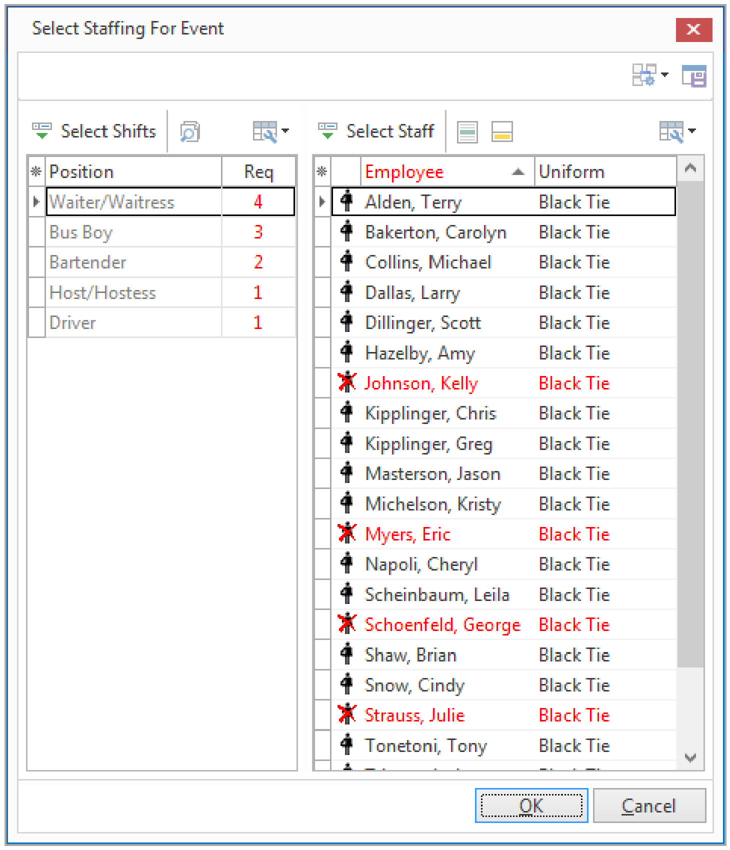
Adding and Managing Staffing for an Event

Selecting Event Staff

Tip: *In addition to (or instead of) tracking specific employees, you can also simply keep track of "shifts" for an event (how many unnamed "waiters" or "bartenders" the party will require). See "Managing Event Shifts," below, for more information.*

1. In the Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.
   Result: *The Event Manager switches to the Sub-Event display.*
2. Select a sub-event (if there are more than one) in the pane on the left-hand side of the screen.
   Note: *The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. You can use the scroll bar at the right of the pane or the navigation bar below the pane to scroll through the sub-events.*
3. Click the **Staffing** tab at the bottom of the screen.

4. Click the **Select Staff** button, located at the right of the **Staffing** tab.
__Result:__ The Select Staffing for Event window opens, with employees separated into groups based on their positions.



5. In the left pane of the window, click the "position," or shift ("Waiter-/Waitress," "Bartender," "Bus Boy," etc.), that you want to schedule.
__Result:__ The right-hand pane of the window displays the list employees for that specific position.
__Note:__ Employees whose names are printed in red are unavailable to work this event. Click the __View Conflicts__ button on the Select Staff window to see why.

6. Select any available employees (drag your mouse or use your **[Ctrl]** key to select more than one at a time).
__Note:__ To select an unavailable employee (one highlighted in red), you must first click the __Settings__ button at the top right-hand side of the window

*and choose **Staff Selection > Allow Selection of Unavailable Employees**.*

*(Click the **Save Window Settings** button*  *to have this option default as enabled.)*

7. Click **OK**.
   Result: *The selected employees are added to the* **Staffing** *tab of the event, with their* <u>Start</u> *and* <u>End</u> *times defaulting to whichever event times you have established as the defaults for their shifts.*
   Note: *As an alternative to clicking **OK**, you can drag and drop selected employees from the Select Staff window onto the* **Staffing** *tab in Event Manager, or you can click the **Select Staff** button.*

8. **[Optional]** On the **Staffing** tab in Event Manager, click into the checkbox in the <u>Conf</u> column for any employees who have confirmed they can work this party. Click into the checkbox in the <u>Flat</u> column to optionally make the employee's wage a "flat" wage (not multiplied by hours worked).
   Note: *To have employees automatically "confirmed" when they are selected into the event, click the **Settings** button* *, located at the top right-hand side of the Select Staffing window, and choose **Staff Selection > Select Staff as "Confirmed."***

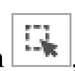
Managing Event Shifts

> ***Tip:*** *You can use the Caterease Shift Wizard to establish rules dictating how many of each shift is required to service a particular event. These required numbers will automatically calculate for each party, and reports and management tools allow you track events that are understaffed.*

1. In the Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.
   Result: *The Event Manager switches to the Sub-Event Display.*

2. Select a sub-event (if there are more than one) in the pane on the left-hand side of the screen.
   Note: *The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. You can use the scroll bar at the right of the pane or the navigation bar below the pane to scroll through the sub-events.*

3. Click the **Staffing** tab at the bottom of the screen.

4. Click the **Select Staff** button , located at the right of the **Staffing** tab.
   Result: *The Select Staff window opens, with employees separated into groups based on their positions.*

5. In the Select Staff window, double-click on any shift ("Waiter," "Bartender," etc.), to retrieve it into the sub-event.
   Result: *That shift - complete with optional price, required number, etc. - is added to the* **Staffing** *tab in the sub-event. (See "Customizing the Shift and Employee Grids," below, for information on how to display these details in*

your shifts grid.)
Note: *You can also highlight multiple shifts by dragging or dropping or using your* ***[Ctrl]*** *or* ***[Shift]*** *key, then click* ***OK*** *to retrieve.*

6. Repeat Step 5 to retrieve other shifts as desired.

7. **[Optional]** Click the **View Shift Rules** button to see the specific rule (created by you) that the program used to calculate the required number for a particular shift.
   Note: *Shift rules are established by you when you set up your program's shifts.*

8. When finished, click **OK** to close the Select Staff window.

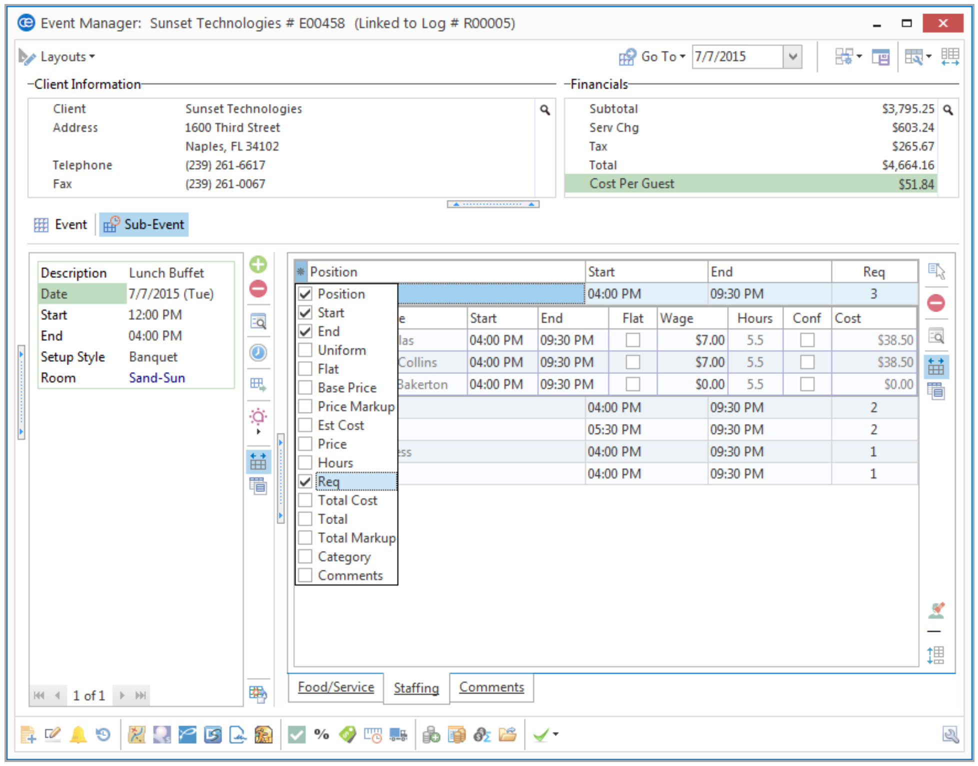
Customizing the Shift and Employee Grids

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

1. Click the **Quick Column Customizing** button, located at the top left of the Shift or Employee grid on the **Staffing** tab.
   Result: *A drop-down list of optional columns appears.*
   Note: *There are two buttons available, as there are two grids - one for "shifts" and another for "employees."*

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

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



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

4. Enter information into the new fields.

Copying Event Comments from the Scratch Pad

The Comments tab in the Sub-Event section of Event Manager is a place for you to enter the general special requests or notes concerning sub-events. These comments will print on your Contract and BEO, but can be suppressed, if desired.

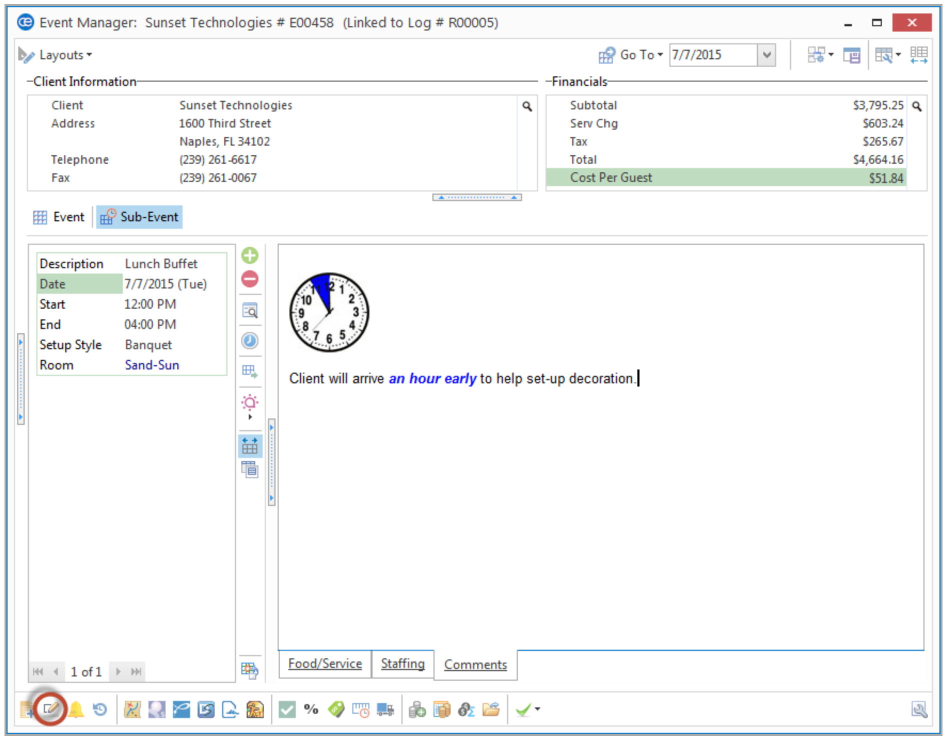
1. Click the **Comments** tab at the bottom of the screen.

2. Click into the large white **Comments** text block.

3. Click the **Scratch Pad** button , located at the bottom of the Event Manager screen.

4. Highlight the text you want to copy and press the **Insert Text** button.

5. Format the text by highlighting it and using the **Format** toolbar at the top of the screen or by highlighting the text, right-clicking, and selecting **Font**.



Unit 6: Appendix: Available Fields

Fields Available in Account Manager

Field	Description
Client/Organization*	Identifies the name of the customer.
Address*	Identifies the customer's address.
Address (Other)	Offers an optional address field; available as a sub-field of the Address field.
City*	Identifies the city where the customer resides.
St/Prov*	Identifies the state or province where the customer resides.
Postal*	Identifies the postal code or ZIP code for the customer.
Telephone*	Identifies the customer's telephone number; will be formatted as per your program's Global Settings.
Telephone (Other)	Offers an optional additional phone number field; will be formatted as per your program's Global Settings; available as a sub-field of Telephone.
Fax*	Identifies the fax number of the client; will be formatted as per your program's Global Settings.
Cellular*	Identifies a cellular phone number for the client; will be formatted as per your program's Global Settings.
Country	Identifies the country where the customer resides.
Email*	Identifies the customer's email address.
Website	Identifies the website address of the customer.
County	Identifies the county where the customer resides.
Category**	Allows you to separate customers by category for tracking purposes; examples might include "Corporate,""Government," "Educational," etc.
Reference**	Allows you to accurately track your marketing strategies by identifying how the customer heard of you originally (as opposed to why they might book individual events with you in the future).
Description**	Allows you to further distinguish between customers for tracking purposes; e.g., you might have customers with a Category (see above) of "Corporate" AND a Description of "Association Member."
Sales Representative**	Identifies a sales representative linked to the customer.
Coordinator	Allows you to identify an account coordinator. This is the person that is considered the overall coordinator for the events associated with a particular account.
Booked	Allows you to track the date on which an event was booked.
Revised	Allows you to track the date on which this event was revised.
Site Name	Allows you to track the off-premise site location for an account.
Site Address/City/St/Province/Postal	Allows you to track the off-premise address details for an account.
Contact Type Preference	Identifies the type of preferred contact for this account (phone/e-mail)
Contact Time Preference	Identifies the contact time preference (morning/afternoon/evening)
Tax Exempt**	Allows you to render every future event for this cus-

Field	Description
	tomer as tax exempt.
Exempt Number**	Identifies a Tax Exempt ID Number for a tax exempt customer; available as a sub-field of the Tax Exempt field.
Expires**	Allows you to enter an expiration date for the client's tax exempt number.
Account ID	Allows you to enter a custom ID number for the customer.
Account #	Offers a unique identifier for the customer; automatically assigned by the program.
Group	Offers a custom quickpick list so multiple clients can be associated with a single group; e.g., different branches of a company or bank might be grouped by that company or bank's name.
Hold	Displays a check box to place a client on hold (meaning that client cannot book new events).
Hold Type	Offers a custom quickpick list of reasons the client was placed on "hold" (e.g., "Past Due Balance,""Seasonal,"etc.)
Hold Date	Automatically notes the date and time a client was place on "hold"
Base Price Markup	Allows you to select a default "base price markup" schedule for the client, so that prices for any event booked by the client will be adjusted by a certain percentage automatically.
Tax Schedule	Allows you to select a default tax schedule for the client, so that any event booked by the client will default to those specific rates.
Pay Method	Allows you to establish a default payment method for all future events booked by the client.
Loyalty #	Allows you to enter a custom number to track customer loyalty; this number will default to each contact person for the client (but can be changed) and will default for each event the client or contact books.
Master Account	Displays the master account this client belongs to, if you have setup a master account relationship.
User Defined Fields	Allows you to create any unique fields you want to suit the needs of your particular company.
* Displayed on the General tab by default. ** Displayed on the Miscellaneous tab by default	

Fields Available on the Events Display

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

Field	Description
	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 email 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.
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	Allows you to create any additional fields you want to suit the specific

Field	Description
Fields†	needs of your company.
* Displayed on Miscellaneous tab by default † Not displayed by default	

Fields Available in the Staffing Grids

This tab shows a grid within a grid: the grid listing specific employees working events resides within a larger grid listing the scheduled shifts.

Field	Description
Position*	Indicates the specific shift or position needed for this sub-event (Waiter, Bartender, etc.).
Start	Indicates the time this specific shift begins; can be set to default to any time associated with the event, and can be edited when necessary.
End	Indicates the time this specific shift ends; can be set to default to any time associated with the event, and can be edited when necessary.
Uniform	Indicates the type of uniform the shift requires; offers a custom quickpick list of choices.
Flat	Offers a checkbox to optionally establish any fee for this shift as a "flat" fee - meaning it will not be multiplied by number of hours or required employees.
Base Price	Indicates the base price (prior to any optional markup) for the shift.
Price Markup	Allows you to markup the base price of the shift by a certain percentage to arrive at a price for this specific event.
Est Cost	Indicates an estimated cost (per hour) for the position. When you select the staff for a particular shift, the estimated cost for that particular event is ignored and the total cost of that shift is derived from the collective cost of the shift's staff. Estimated Cost is reflected by a strike-through line inEstimated CostandTotal Cost.
Price	Indicates the price of the shift for this particular event.
Hours	Adds the hours from the Start time of the shift to its End time.
Required*	Indicates the number of employees required to fill this shift for this event; automatically calculated based on rules you establish (and can be edited).
Total	Calculates the total due from the customer for this shift by multiplying the Price times Hours times the required number of employees.
Total Markup	Calculates the total amount the shift has been marked up by multiplying the Price Markup times Hours times the required number of employees.
Category	Allows you to categorize this shift for future tracking; offers custom quickpick list of options (e.g., "Back of House," "Front of House").
Comments	Offers a drop-down text box for you to enter specific comments pertaining to this shift.
	** Displayed in the Employee grid by default.*

Field	Description
Employee*	Identifies the name of the employee.
Start*	Indicates the time the employee will start working; defaults to the Start time of the shift, but can and should be edited when appropriate.
End*	Indicates the time the employee will end working; defaults to the End time of the shift, but can and should be edited when appropriate.
PosNum	Indicates an employee's position number. (This field is auto-assigned by Caterease.)
Uniform	Indicates the type of uniform the employee will wear for this shift.
Flat	Displays a checkbox, indicating whether the employee’s wage is a flat wage or hourly (hourly wages are multiplied times hours worked).

Field	Description
Wage	Indicates the hourly wage of the employee; defaults to the wage established in employee setup, but can be edited.
Hours	Adds the hours from the employee's Start time to his End time.
Category	Allows you to categorize the employee for future reference; examples might include "Full Time" or "Part Time."
Conf	Displays a checkbox, indicating whether the employee has confirmed he or she can work the shift.
Cost*	Calculates employee's wage times his total hours worked.
Comment	Offers a drop-down text box for you to enter specific comments pertaining to this employee.
	** Displayed in the Employee grid by default.*

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