caterease
catering + event planning solution

Training Guide

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Queries and Detail Grids

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Unit 1: Tracking Current Events and Accounts Receivable

Caterease offers many query tools to help you instantly find any data you need. Queries are standardized for consistency and functionality. Each query begins with a base query window, where fields can be selected that are specific to the records returned. Filters or query conditions can be set in order to further customize your query results. All query tools remain open as you zig-zag around your program, resulting in fast navigation. So, if you double-click on a party in one of your query grids and then open that event in Event Manager, the query you ran will remain open in the background.

The Current Events Query is designed to show details about your upcoming events. Using this tool, you can see a complete list of all events scheduled for the next week, two weeks, month, etc., all with a single mouse click. What's more, you can generate a multitude of prints based on your results: numerous financial and detail reports in a variety of different layouts; contracts, invoices, and other event prints; miscellaneous prints, including staffing sheets, ingredients lists, costing summaries, and more. You can print one, several, or all of your events, with a single mouse click. You can even generate batch e-mails, attaching any number of prints and using a dynamic merge letter as the body of your outgoing message!

Using the powerful Current Events tool, you can quickly and easily track all upcoming events - or only those in the next week, two weeks, month, etc. Results are displayed in a detail grid, which can then be customized to show any information you want and then printed or even exported in a variety of formats. The Accounts Receivable Query, also discussed in this unit, will quickly track all of your upcoming events with a date that has passed and a balance still outstanding. You can choose to look at only those events that are 30 days out, 60 days out, etc.

Objectives:

Upon completing this unit, you will be able to:

- *Query the program for all of your current (upcoming) events.*
- *Query events in a certain date range, i.e., one week out, two weeks out, etc.*
- *Generate reports based on the results of your queries.*
- *Print a contract or other event print for one, several, or all of the events in your query results.*
- *Save custom lists of multiple prints for instant access.*
- *Generate a unique e-mail letter, with attachment, to one, several, or all of the events in your query results.*
- *Query all accounts receivables, including accounts that are specifically 30, 60, 90, or 120 days past due.*

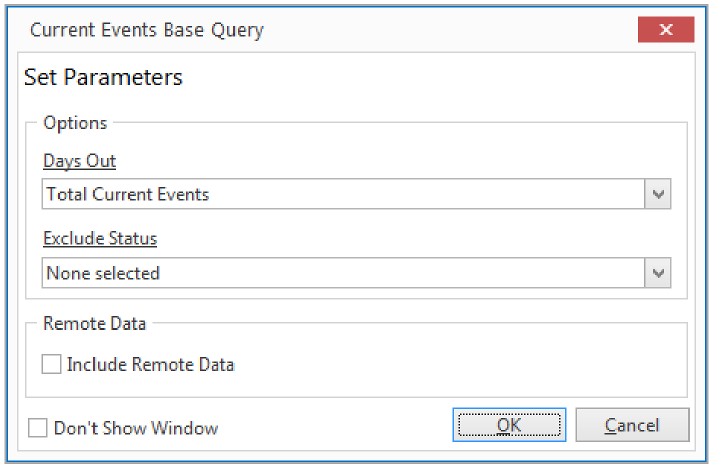
Tracking Current Events

Using the powerful Current Events tool, you can quickly and easily track all upcoming events - or only those in the next week, two weeks, month, etc. Results are displayed in a detail grid, which can then be customized to show any information you want and then printed or even exported in a variety of formats.

Tracking Your Current Events

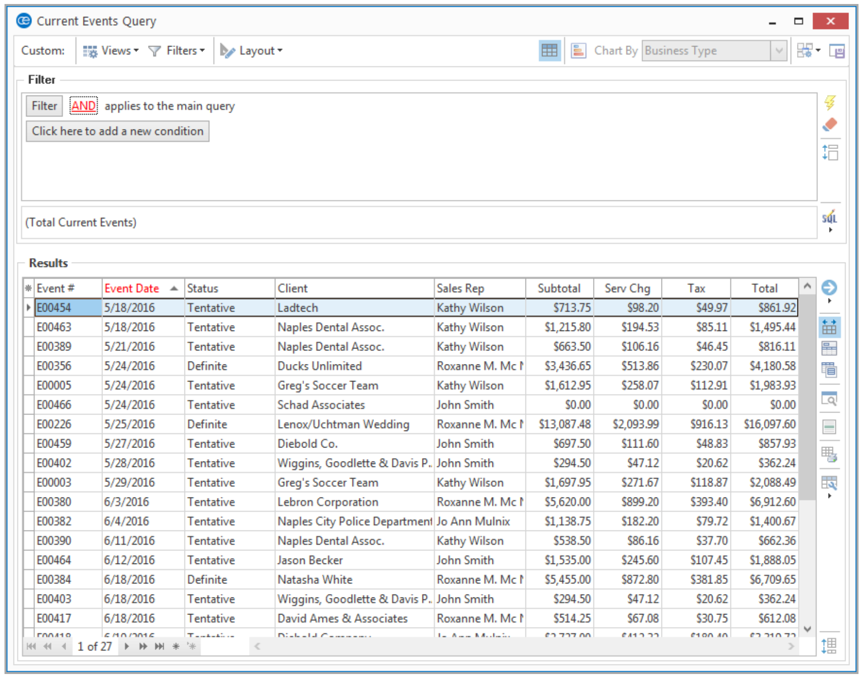
__Tip:__ Click into the check-box labeled __Don't Show Window__ at the bottom left of the tool to automatically display your grid results. You can quickly edit your query criteria at any time.

1. Click the **Tools** sidebar group, located on the left-hand side of the screen.
2. Click the **Current Events** button.
   Result: *The Current Events Base Query window opens.*



3. Click the down arrow to the right of the Days Out field and choose how many days out you would like your search to go.
4. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.
   Note: *Placing a check in a box causes the tool to exclude events with that status from your results.*
5. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.
6. When finished, click **OK**.
   Result: *The events matching your criteria are listed in a detail grid.*

__Tip:__ Click the __SQL__ button, located on the upper right-hand side of the window, to edit your query criteria.

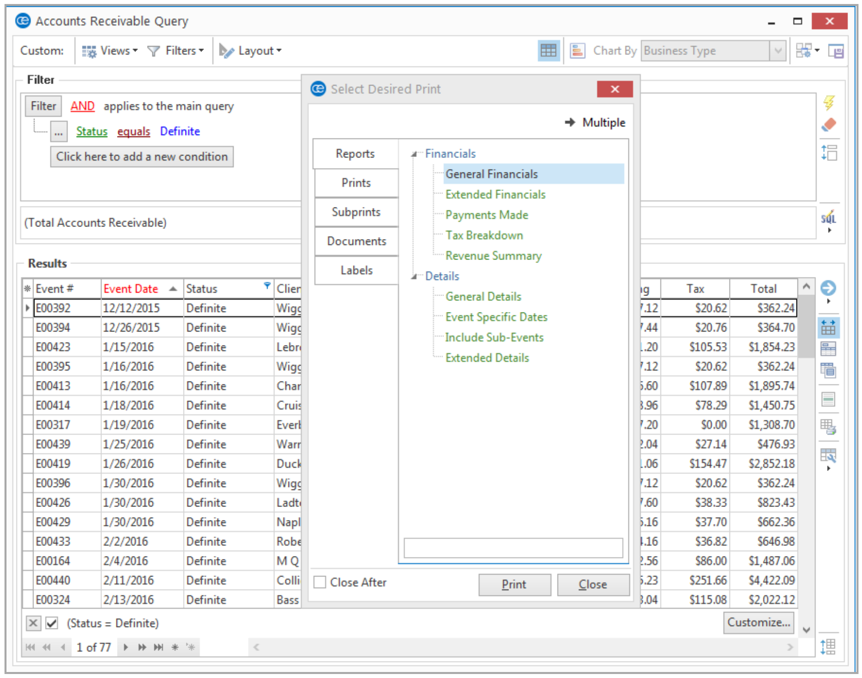


Generating Reports from a Results Grid

Several pre-formatted reports are available in a variety of layouts, to show financial information and general details about all of the events listed in your query result grid.

Generating Reports from a Results Grid

1. Generate a query, as described above.
2. Click the *top half* of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.
   Result: *The Select Desired Print window opens, where you can select your reports from a floating window.*
3. Click on the **Reports** tab.
4. Select the title of the report you want to print. (See the table, below, for a description of the various reports.)



5. Click the **Print** button, located at the bottom of the window.
Result: *The Print Preview displays.*
Note: *Multiple printing is not available (or necessary) for reports.*

6. **[Optional]** Click your right mouse button over any report title and choose **Rename Report** to change the name of the selected title. Click the right mouse button again and choose **Save Report Titles** if you want that change to be permanent. (You will receive a confirmation prompt. Click **Yes** to confirm your choice.)

Available Reports

Default Report Title	Contents
General Financials	Client/Organization, Event Number; Event Date; Food Total, Beverage Total, Liquor Total, Equipment Total, Labor Total, Room Total, Other Total; Subtotal; Gratuity; Service Charge; Tax; Total
Extended Financials	Same as above, plus: Sales Rep; Guests; Amount Paid; Balance; Additional Food/Service Item Types; Variance (Days Out)
Payments Made	Client/Organization; Event Number; Event Date; Telephone; Sales Rep; Category; Guests; Subtotal; Gratuity; Service Charge; Tax; Total; Amount Paid; Balance; Next Deposit; Next Deposit Due Date; Variance (Days Out) The following payment details (money received) are also included: Payment Date; Payment Amount; Pay Method The following deposit details (money scheduled to be received) are included: Due Date; Deposit Amount; Paid (Yes/No); Payment Date
Tax Breakdown	Identical to General Financials Report, above, with the following additional fields: Taxes 1, Taxes 2, Taxes 3 and any additional Food/Service Item Types that have been added.
Revenue Summary	Event fields included: Client/Organization; Event Number; Event Date; Sales Rep; Guests; Food Total; Beverage Total; Liquor Total;

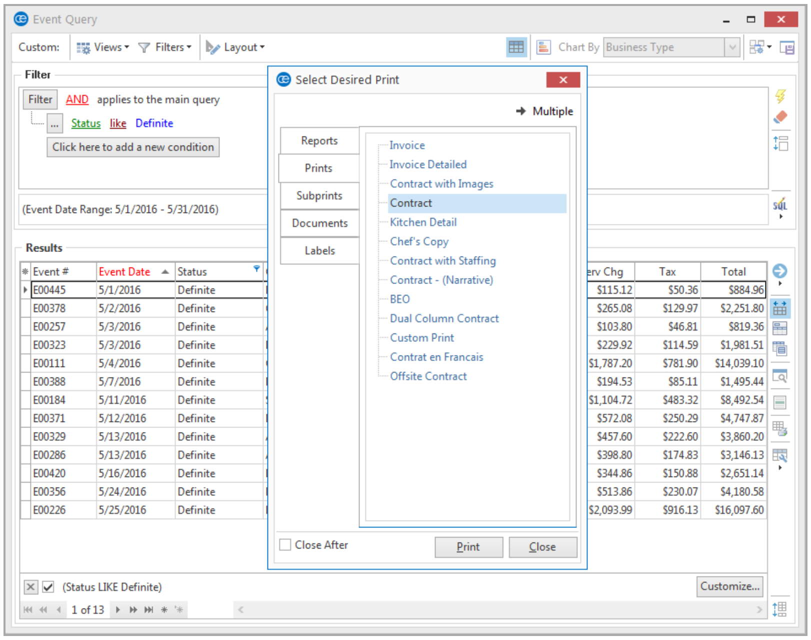
Default Report Title	Contents
	Equipment Total; Labor Total; Room Total; Other Total; Subtotal; Gratuity; Service Charge; Tax; Total; Paid Amount; Balance; Cost per Guest Sub-event fields included: Description; Start Time; End Time; Venue; Guests; Members; Non-Members
General Details	Client/Organization; Event Number; Event Date; Telephone; Booking Contact; Site Contact; Sales Rep; Theme; Guests
Event Specific Dates	Client/Organization; Event Number; Event Date; Sales Rep; Booked Date; Revised Date; Definite Date; Cancelled Date; Contract Date; BEO Date; Invoice Date; Next Deposit Date
Include Sub-Events	Same as General Details, above, plus: Sub-Event Description; Sub-Event Guests; Start Time; End Time; Venue
Extended Details	Client/Organization; Event Number; Event Date; Telephone; Fax Number; Booking Contact; Site Contact; Sales Rep; Theme; Reference; Category; Folio #; Guests

Generating Event Prints

You can highlight one, several, or all events listed in your results grid and generate contracts, invoices, and other event prints for those parties. You can even generate multiple prints for multiple events, with a single mouse click!

Generating a Print for Multiple Events

1. Generate a query, such as an Event Query or Current Events Query.
2. From the query results, select multiple events by holding down your **[Shift]** or **[Ctrl]** key while selecting.
   Note: *The **[Ctrl]** key lets you select individual records; the **[Shift]** key selects two records and all others in-between them.*
3. Click the top half of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.
   Result: *The Select Desired Print window opens, where you can select your prints from a floating window.*
4. Select the **Prints**, **Sub-Prints**, **Documents**, or **Labels** tab.
   Note: *Batch printing is not available for reports.*
5. Click on a print title.
6. Click the **Print** button at the bottom right-hand side of the window.
   Result: *A confirmation prompt appears.*
7. Click **Yes**.
   Result: *One print for each of the selected events will be automatically sent to your printer.*
   Note: *Batch prints do not generate a Print Preview; they are sent to your printer automatically.*



Generating Multiple Prints for Multiple Events

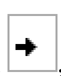
1. Select an event from your results screen, or hold your **[Shift]** or **[Ctrl]** key down to select multiple records.
   Note: *The **[Ctrl]** key lets you select individual records; the **[Shift]** key selects two records and all others in-between them.*

2. Click the top half of the **Prints** button, located at the top of your screen, in the **Home** ribbon tab.
   Result: *The Select Desired Print window opens, where you can select your prints from a floating window.*

3. Click the **Multiple** button, located on the top right-hand side of the window.
   Result: *A new panel opens along the right-hand side of the Select Desired Print window.*

4. Select the **Prints**, **Subprints**, **Documents**, or **Labels** tab.
   Note: *Multiple printing is not available (and not necessary) for reports.*

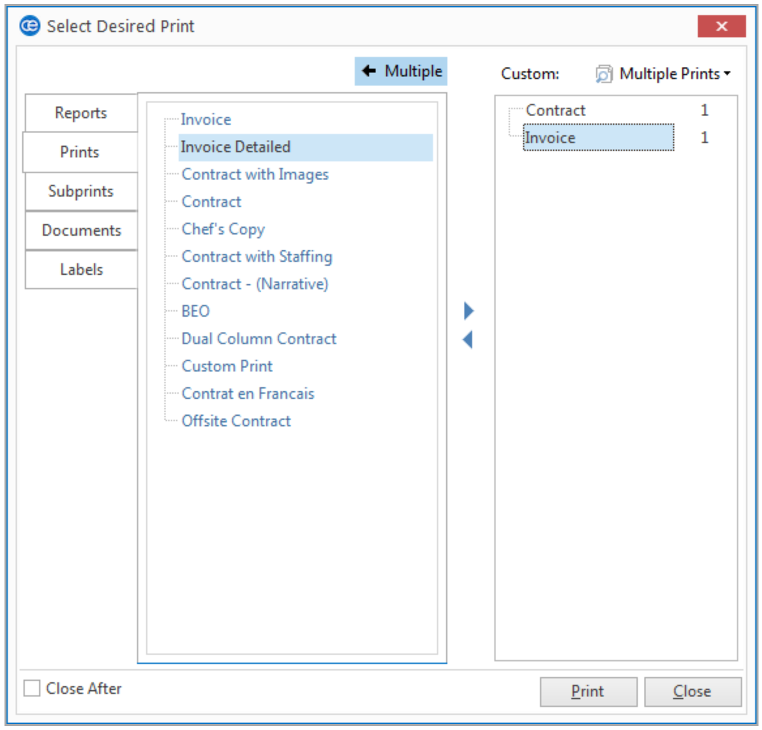
5. Click on a print title.

6. Click the right-arrow button , located in the middle of the Select Desired Print window.
   Result: *Your selected print title is moved to the panel on the right-hand side of the window.*

7. Repeat for other desired prints.

8. Type, into the field on the right-hand side of the pane, the number of prints you would like to generate for each print.

9. Click the **Print** button at the bottom right-hand side of the window.
   Result: *Multiple prints for each of the selected events will automatically be sent to your printer.*
   Note: *Multiple prints do not generate a Print Preview; they are sent to your printer automatically.*



Creating Custom Multiple Print Lists

Once you have established a list of multiple prints to generate, you can save that list for future use. For example, you can create a custom list of multiple prints called "Back-of-House Prints," which might consist of kitchen prints, ingredients lists, required items lists, etc., and then retrieve that list, with a single mouse click.

Tip: *If you want all users on your Caterease network to have access to your custom print list, click the* ***Shared*** *button at the bottom of the window. Local* ***(User)*** *print lists are only accessible on the computer from which they are created. (Professional Version.)*

1. Follow the steps in the section above to select multiple prints to be generated.

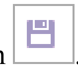
2. Click the **Multiple Prints** button, located at the top right of the Select Desired Print window.

3. Choose **Custom.**
   Result: *The Custom Multiple Prints window opens.*

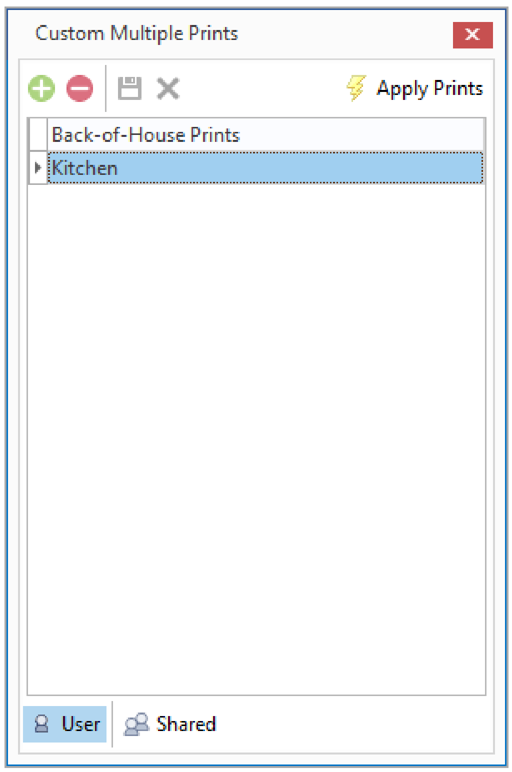
4. **[Optional]** Click the **Shared** button, located at the bottom of the Custom Multiple Prints window, if you want this custom prints list to be shared with other users on your Caterease network. (Available in the Professional Version of Caterease.)

5. Click the **Add Multiple Prints** .
   Result: *A line, titled "New Multiple Prints," is added to the list.*

6. Type the name of your multiple prints list over the words "New Multiple Prints."

7. Click the **Save Current Multiple Prints List** button .

8. Close the Custom Multiple Prints window by clicking the , located on the top right-hand corner of the window.



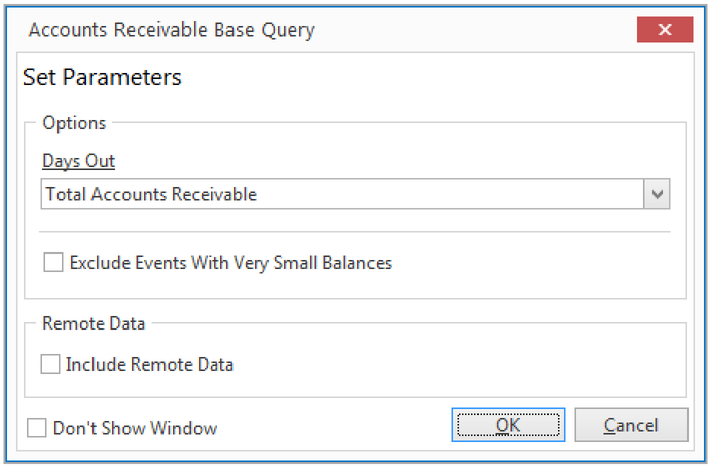
Running an Accounts Receivable Query

While the Current Events query will quickly track all of your upcoming events, the Accounts Receivable query will track all events with a date that has passed and a balance still outstanding. You can choose to look at only those events that are 30 days out, 60 days out, etc.

Running an Accounts Receivable Query

1. Click the button labeled **Accounts Receivable** in the **Tools** sidebar group.
   Result: *The Accounts Receivable Base Query window opens.*

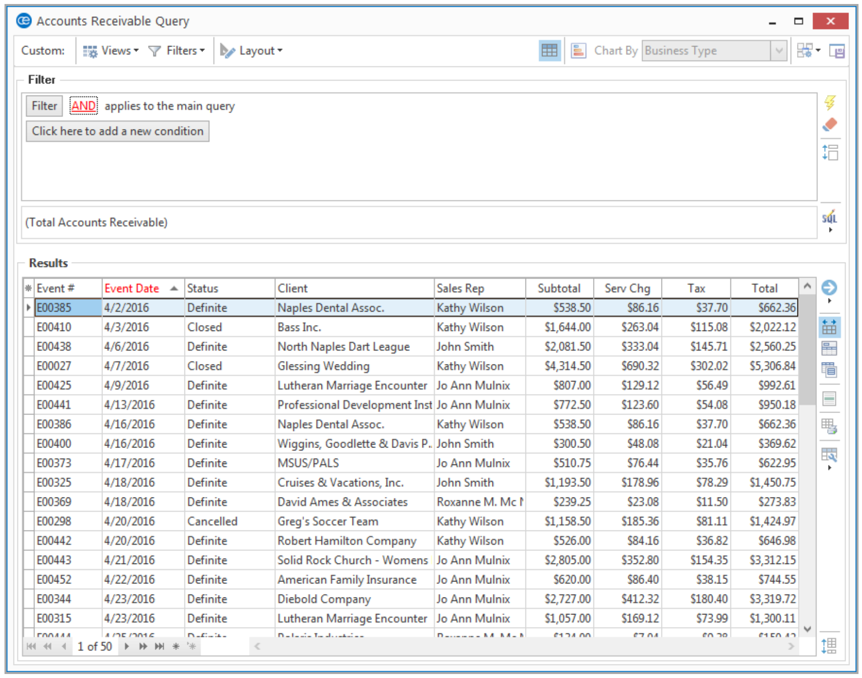
2. Click the down arrow under **Days Out** and set a range for your query (Over 30; Over 60; Over 90; Over 120; 31-60; 61-90; 91-120).



3. Optionally click into the checkbox to the left of the **Exclude Events With Very Small Balances** field if you would like to exclude events with a balance of less than five cents.

4. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings) if you would like remote data to be included in your query results.

5. Click **OK** to generate the query.
   Result: *A results grid displays, listing all events in your database for which you are owed money, within the parameters you have set.*



Event #	Event Date	Status	Client	Sales Rep	Subtotal	Serv Chg	Tax	Total
E00385	4/2/2016	Definite	Naples Dental Assoc.	Kathy Wilson	$538.50	$86.16	$37.70	$662.36
E00410	4/3/2016	Closed	Bass Inc.	Kathy Wilson	$1,644.00	$263.04	$115.08	$2,022.12
E00438	4/6/2016	Definite	North Naples Dart League	John Smith	$2,081.50	$333.04	$145.71	$2,560.25
E00027	4/7/2016	Closed	Glessing Wedding	Kathy Wilson	$4,314.50	$690.32	$302.02	$5,306.84
E00425	4/9/2016	Definite	Lutheran Marriage Encounter	Jo Ann Mulnix	$807.00	$129.12	$56.49	$992.61
E00441	4/13/2016	Definite	Professional Development Inst	Jo Ann Mulnix	$772.50	$123.60	$54.08	$950.18
E00386	4/16/2016	Definite	Naples Dental Assoc.	Kathy Wilson	$538.50	$86.16	$37.70	$662.36
E00400	4/16/2016	Definite	Wiggins, Goodlette & Davis P..	John Smith	$300.50	$48.08	$21.04	$369.62
E00373	4/17/2016	Definite	MSUS/PALS	Jo Ann Mulnix	$510.75	$76.44	$35.76	$622.95
E00325	4/18/2016	Definite	Cruises & Vacations, Inc.	John Smith	$1,193.50	$178.96	$78.29	$1,450.75
E00369	4/18/2016	Definite	David Ames & Associates	Roxanne M. Mc N	$239.25	$23.08	$11.50	$273.83
E00298	4/20/2016	Cancelled	Greg's Soccer Team	Kathy Wilson	$1,158.50	$185.36	$81.11	$1,424.97
E00442	4/20/2016	Definite	Robert Hamilton Company	Kathy Wilson	$526.00	$84.16	$36.82	$646.98
E00443	4/21/2016	Definite	Solid Rock Church - Womens	Jo Ann Mulnix	$2,805.00	$352.80	$154.35	$3,312.15
E00452	4/22/2016	Definite	American Family Insurance	Jo Ann Mulnix	$620.00	$86.40	$38.15	$744.55
E00344	4/23/2016	Definite	Diebold Company	Jo Ann Mulnix	$2,727.00	$412.32	$180.40	$3,319.72
E00315	4/23/2016	Definite	Lutheran Marriage Encounter	Jo Ann Mulnix	$1,057.00	$169.12	$73.99	$1,300.11

Unit 2: Customizing the Results Grid

Caterease grids offer unprecedented flexibility! These powerful tools let you look at any information you're interested in seeing. You can customize the columns displayed on a grid; sort or group the grid data by any detail; create footers to show sub-totals for each of your groupings; and then print or export the grid that you have created. You can even save your custom grid layouts for future use, making a limitless number of custom displays just a mouse click away!

Objectives:

Upon completing this unit, you will be able to:

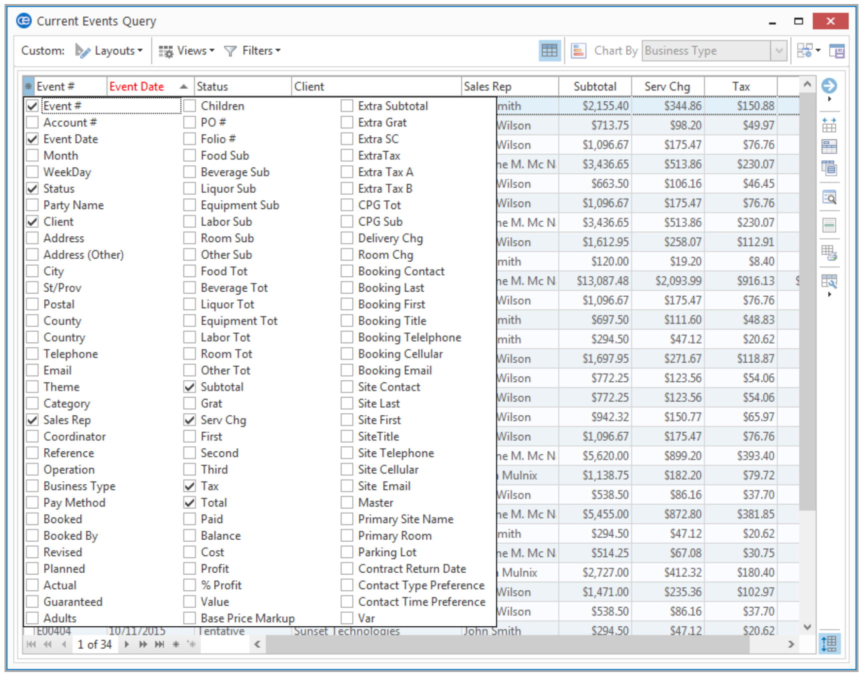
- *Customize the results grid to show the columns of information you want to see.*
- *Sort the data in the grid by any detail.*
- *Group the data in the grid by any detail.*
- *Save your custom grid views for future use.*
- *Filter records from the grid that you temporarily don't want to see.*
- *Save your custom filters for future use.*
- *Create a custom layout, which includes both grid views and filters.*
- *Use the Find panel to search for any detail.*
- *Enable any text field as an optional Preview field.*
- *Print the detail grid as a custom report.*
- *Export your grid data for use in another software program.*

Customizing Grid Columns

1. At the top left corner of a detail grid, click the **Quick Column Customizing** button .
   Result: *A drop-down list of optional columns appears.*

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

   Note: *The* ***Automatically Set Column Widths*** *button , located on the right-hand side of the grid, is generally enabled 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 title in the customization window and drag up and down to reposition that column in the list of customization options.
   Note: *You can also drag column headings left and right in the grid itself.*

4. Use these details to sort, group, or filter the grid data as described in the topics below.

Sorting Grid Data

1. Click on the heading of a column in a grid to sort by that detail.
   Result: *Records are sorted in ascending order by that detail.*

2. **[Optional]** Click on the same column heading again to sort by that detail in descending order.

3. **[Optional]** Hold the **[Shift]** key down on your keyboard and click a second column heading to sort by an additional detail.
   Result: *Records are sorted initially by the first detail you selected, then within that group they are sorted by the second detail.*

Tip: *All grids (beginning with Caterease Version 16) allow for sorting in ascending and descending order.*

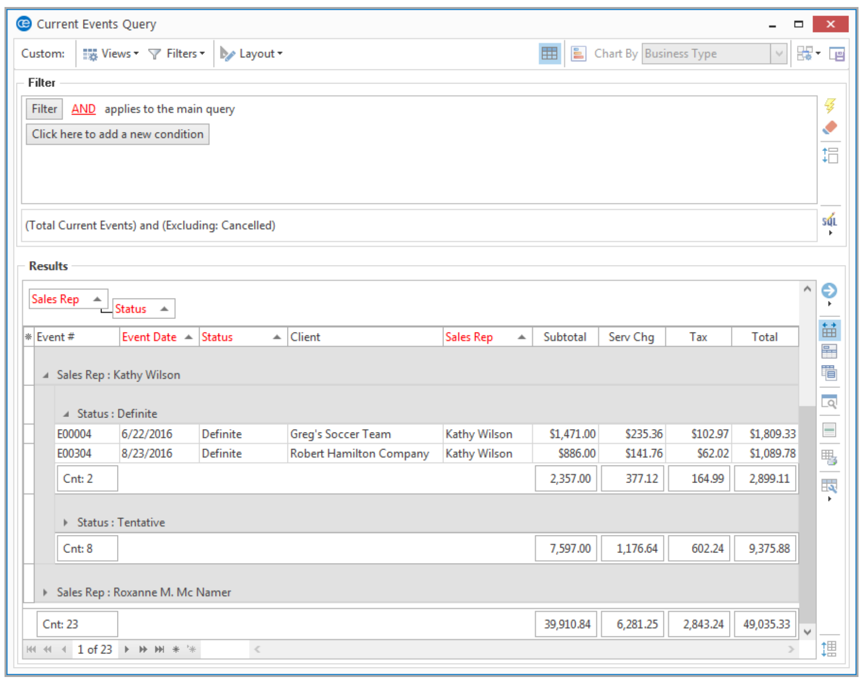
Grouping Grid Data

__Tip:__ You can also use the "Group By This Field" option to separate records into groups by merely clicking on a column heading with your right mouse button and choosing __Group By This Field__.

1. From a results grid, click the **Group By Box** button , located at the right of the detail grid.
   Result: *A small pane appears across the top of the detail grid with the words "Drag a column heading here to group by that column."*

2. Hold your left mouse button down on the heading of any column and drag that heading into the pane at the top of the grid.
   Result: *Grid data is now separated into groups based on your selection.*
   Note: *As an alternative to Steps 1 and 2, you can right-click over a column heading and choose **Group By This Field** (not available in Express).*

3. Repeat Steps 1 and 2 to create groups within groups.
   Result: *Records are grouped initially by the first detail you selected, then within that group they are separated by the second detail.*



4. Click the expand button to the left of each group in the grid to display the records in that group.
   Result: *The group opens and displays its records, including optional footers (group subtotals), where applicable.*
   Note: *If footers are not visible for each group, click the **Grid Tools** button* *, located on the right-hand side of the window, and choose **Show Footer.***

5. **[Optional]** Right-click into the footer of any column in the grid, and choose to show a total "Count" for that column, or for financial columns choose to show the sum of all values, the minimum value, the maximum value, or the average value.

6. Click the triangle to the left of any expanded group to collapse that group and hide its contents.
   Result: *The group closes and hides its records.*
   Note: *As an option, you can right-click within a grid and select* ***Expand All*** *or* ***Collapse All*** *to open or close all groups.*

7. Remove groups by dragging column headings from the "Group By Box" pane back into position among other headings in the grid.
   Note: *If you have grouped by multiple details, each group heading must be removed individually.*

Saving/Loading Custom Grid Views

Once you have established the grid you want (the columns are displayed the way you want, sorted the way you want, grouped the way you want, etc.), you can save that custom grid view for future use. Perhaps every month you're going to want to look at your financial information grouped by sales representative, for example. Create this grid view once, then save it to be retrieved every month, with just the click of a button. Grid views can be saved locally (meaning they will only be available under your log-in credentials) or shared across all Caterease users on your network). Not available in the Express version.

1. Establish a custom grid view, as outlined previously.

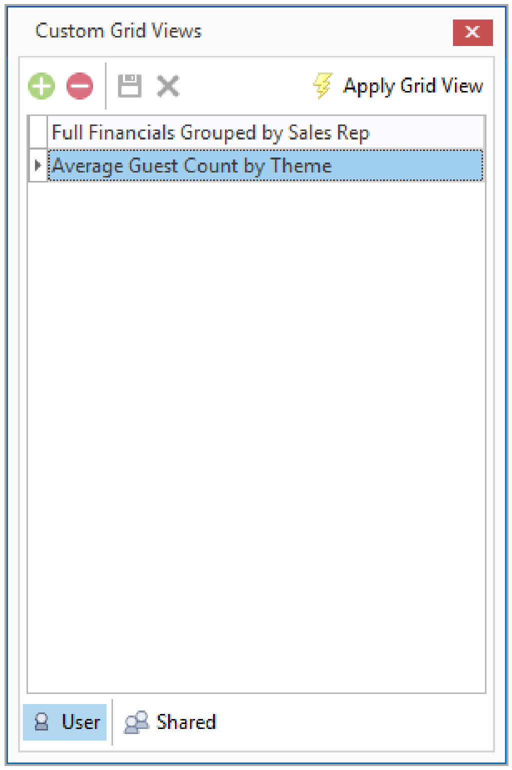
2. Click the **Views** button, located at the top left-hand side of the results grid display.

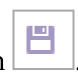
3. Choose **Custom**.
   Result: *The Custom Grid Views window opens.*

4. **[Optional]** Click the **Shared** button at the bottom of the pop-up window if you want this custom filter to be shared with other Caterease users.
   Note: *As a default, the* ***User*** *button is selected, meaning this new filter will only be available for your use.*

5. Click the **Add Grid View** button.
   Result: *A new blank line is added to the list.*
   Note: *You can update an existing grid view by right-clicking on its name in the list and choosing* ***Apply Grid View.***

6. Type a name for your new grid view into the field provided.



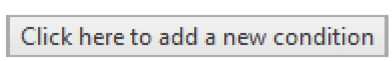
7. Click the **Save Current Grid View** button .

8. When finished, click the  at the top right of the Custom Grid Views window to close it.

9. Switch among saved grid filters by clicking the **Views** button at the top of the grid and selecting the name of a previously saved grid view.

Customizing Conditions in a Filter

1. Generate a query, such as an Event Query (**Queries** sidebar > **Event Query**).

2. Click on the 

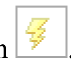
button to add a new condition (search criterion).
Result: *A condition will be added, stating* ***"Event # equals <empty>****.*
Note: *To remove a condition added by mistake, click the ellipsis button to the left of the condition and select* ***Remove Condition****.*

3. Click on the words **Event #** in the condition and choose any condition from the drop-down list. This will be the first condition you search by.

4. Click the **equals**, next to your condition, and choose any comparison option. Comparisons might say "Like," "Between," "In," etc.

5. Click **<empty>** in the condition and choose a value for the condition to be compared to.
   Note: *These lists are dynamic. If you are searching by Event Theme, then this list will reflect your quickpick list of themes. If you are searching by date, this list will reflect days or date ranges. If you are searching by financial fields, a window in which you can type specific values will open.*

6. Add as many query conditions as desired by following Steps 2 - 5, above.
   Note: *You can query records that match one condition or another or records that do not match any conditions you set.*)

7. When finished adding conditions, click the **Perform Query** button .
   Result: *Your query results will display in a grid in the lower pane of your screen.*

Filtering Grid Data

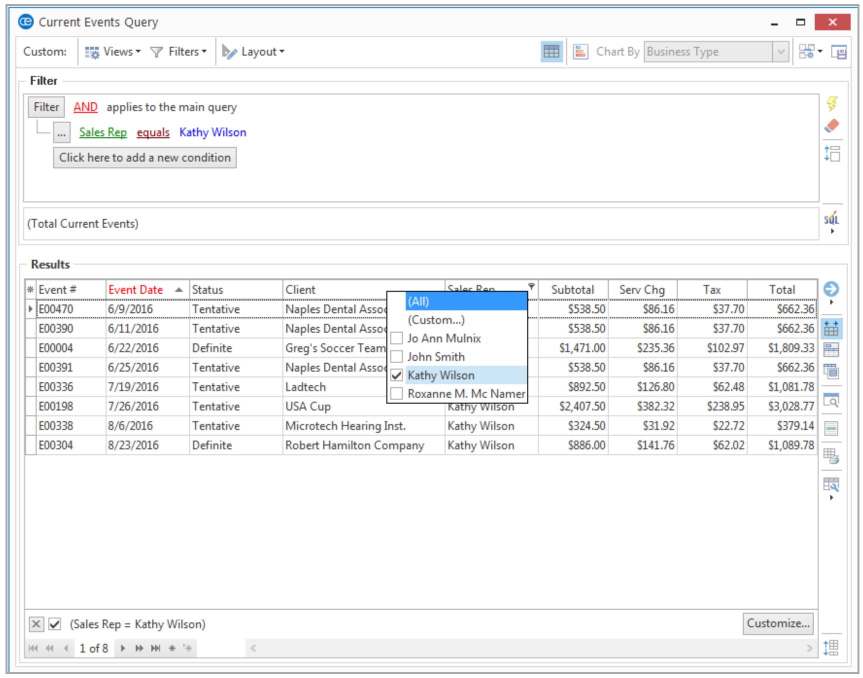
> ***Tip:*** *You can establish custom filters by clicking* ***Custom*** *in Step 3, above, and then choosing from comparison phrases such as "equals," "does not equal," "less than," "like," etc. When using "like" to filter for similar records, use "_" as a wildcard to represent any single character, and "%" to represent any series of characters. Use the conjunctions "And" and "Or" to optionally establish a second custom condition.*

1. Float your mouse cursor over any column heading in a grid (without clicking).
   Result: *A down arrow appears at the right of the column heading.*

2. Click the filter icon at the right of the column heading.
   Result: *A drop-down list of options appears.*

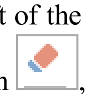
3. Click into the checkbox next to any option in the drop-down list to filter by that detail.
   Result: *The grid updates to show only records matching your selection.*
   Note: *At the bottom of the grid window, the filter(s) you establish are being*

stored temporarily while the grid remains open.



4. Repeat Steps 1-3 to filter by additional details as desired.

5. Restore previous filters from this grid session by clicking the filter icon to the right of the filter details (bottom left corner of the grid) and choosing a different filter from the list.
   Note: *This list saves filters you have established in this one session of the grid only. See "Saving/Loading Custom Filters," for information on creating a list of saved filters for frequent use.*

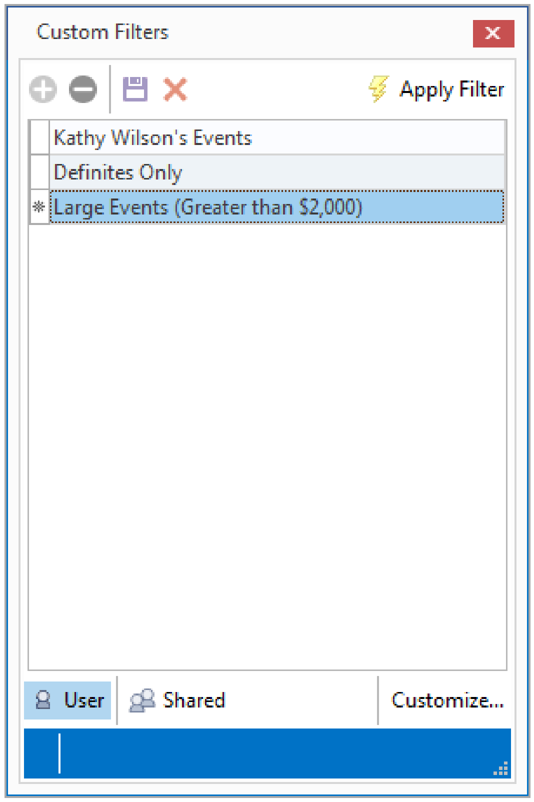
6. **[Optional]** Remove the current filter by clicking the X to the left of the filter name or by clicking the **Clear Query Criteria & Results** button , located on the upper right-hand side of the window.

Saving/Loading Custom Filters

1. Filter the grid data as described above.

2. Click the **Filters** button at the top of the grid window.

3. Click **Custom**.
   Result: *The Custom Filters window opens.*



4. **[Optional]** Click the **Shared** button at the bottom of the pop-up window if you want this custom filter to be shared with other Caterease users.
   Note: *As a default, the* ***User*** *button is selected, meaning this new filter will only be available for your use.*

5. Click the **Add Filter** button  at the top left of the pop-up window.
   Result: *A new blank line is added to the list.*
   Note: *You can update an existing filter by right-clicking on its name in the list and choosing* ***Apply Filter****.*

6. Type a name for your new filter.

7. Click the **Save Current Filter** button .

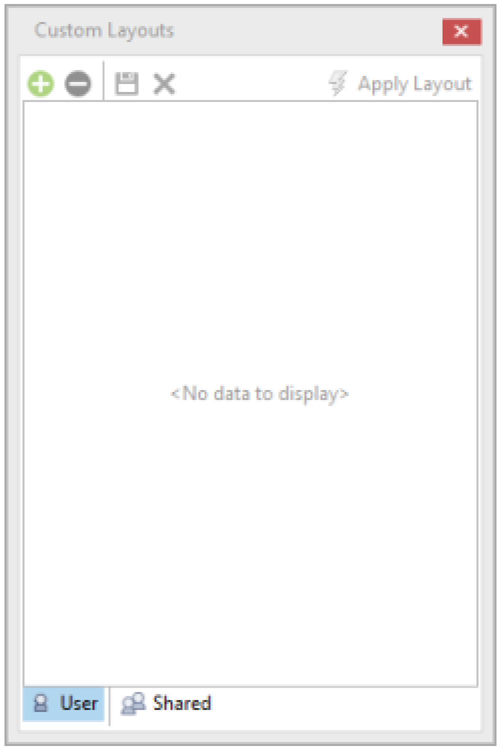
8. When finished, click the  at the top right of the Custom Filters window to close it.

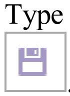
9. Switch among saved grid filters by clicking the **Filters** button at the top of the grid and selecting the name of a previously saved filter.

Saving Custom Layouts

Tip: *Select a custom layout on-the-fly by clicking the* ***Layouts*** *button at the top of the window and selecting a layout name. (Multiple layouts are not available in Express). If you want to retrieve custom window size and position settings, custom grid views or custom tool bar settings with your saved layout, select those options first (****Layouts*** *>* ***Include****) before selecting your custom layout. If you want this new layout to serve as the default look for the program, you must click the* ***Save Window Settings*** *button at the top right of the window. If you want this to be the new default look for all users on your network, click the* ***Settings*** *button at the top right and choose* ***Shared*** *>* ***Save Current Window.***

1. Customize the results grid based on the topics above.
2. Click the **Layout** button at the top left of grid and choose **Custom.**
   Result: *The Custom Layouts window opens.*



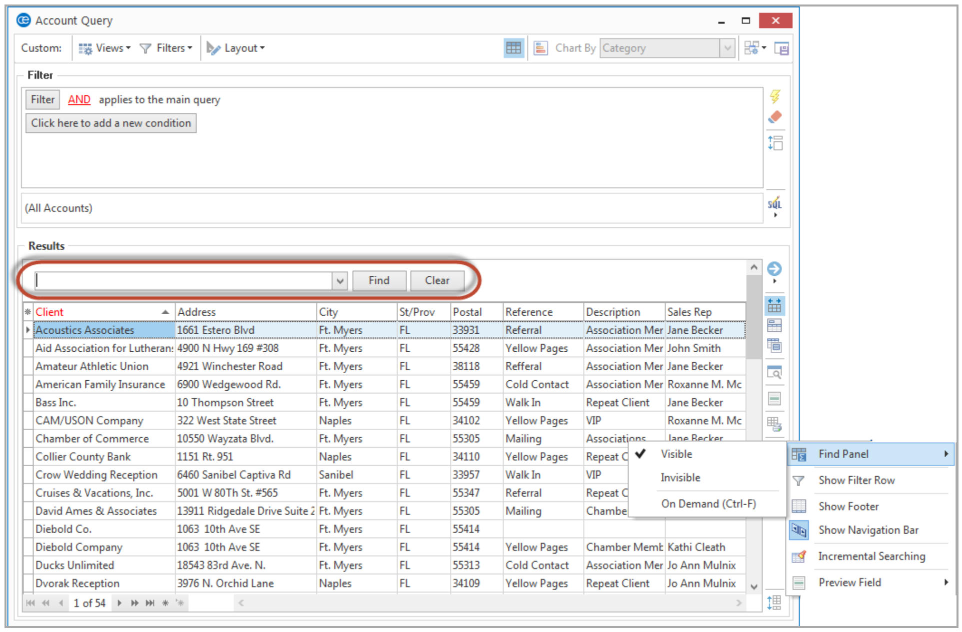
3. **[Optional]** Click the **Shared** button at the bottom left of the window if you want your new layout to be available to all users on your Caterease network.
   Note: User *layouts are only available to you as a user (from any computer).*
4. Click the **Add Layout** button , at the top left of the window.
   Result: *A new line is added to the window with the default name of "New Layout."*
   Note: *You can update an existing layout on the list to show your current screen display by right-clicking on the layout name and choosing* ***Apply Layout****.*
5. Type a name for new layout, and click the **Save Current Layout** button .
6. Click the  at the top right of the Custom Layout window to close it.

Using the Find Panel

All queries now have an optional Find panel (Available in Version 16, Professional Version).

> ***Tip:*** *Prior to utilizing the Find panel, ensure you have customized your grid to display the desired columns, as only visible fields can be searched.*

1. Click the **Grid Tools** button , located on the right-hand side of the detail grid.



2. Choose **Visible** or **On Demand**.
   Note: *"Invisible" is the default.*

   - If "**Visible**" is selected, the Find panel will display on your screen.
   - If "**On Demand**" is selected, the panel will become visible when the **[Ctrl]** key and the **F** key are pressed simultaneously.

3. Simply begin typing the name of item you are searching for into the field provided and you will be incrementally scrolled to possible matches.

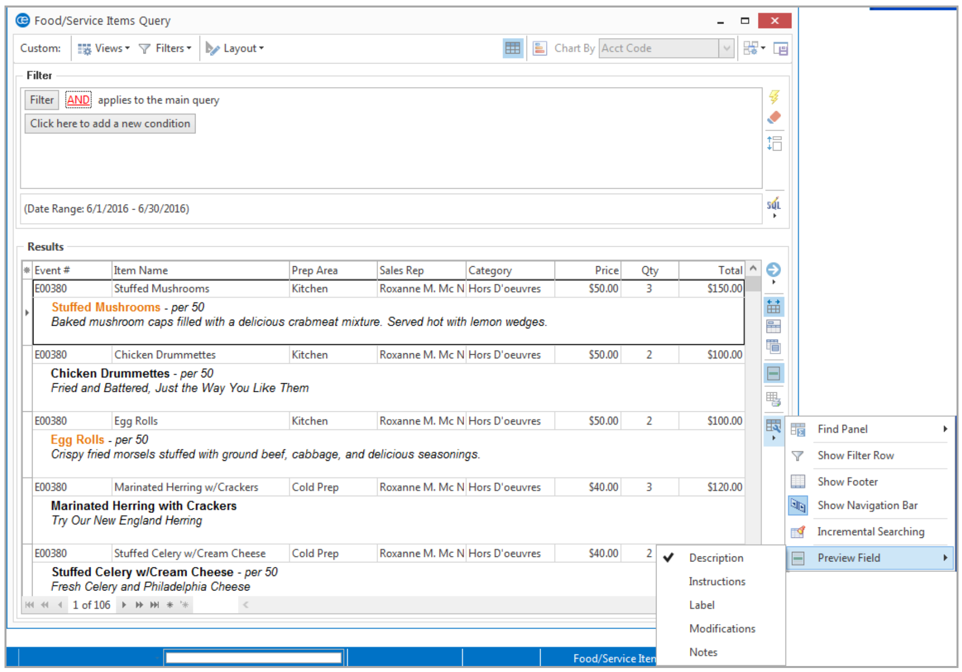
Using the Preview Field

You can choose any text field as an optional Preview Field (for Notes, Comments, Allergy Information, Modifications, for example), in any of your query grids. (Available in Version 16, Professional Version).

1. Click the **Grid Tools** button , located on the right-hand side of the detail grid.

2. Click the **Preview Field** button to expand your list of available fields.

3. Click on the desired option.
   Result: *The grid will instantly display the text associated with the field you specified.*



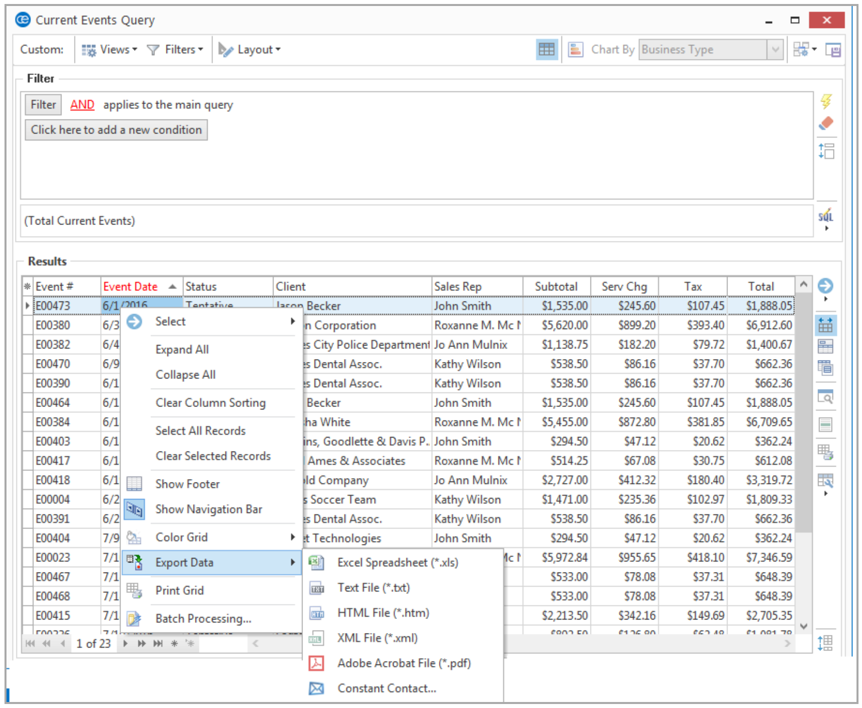
Exporting Grid Data

1. Click your right mouse button anywhere within a results grid.
   Result: *A pop-up menu appears.*

2. Select **Export Data**.
   Result: *A sub-menu appears.*

3. Choose a format for your export: Excel Spreadsheet, Text File, HTML File, XML File or Adobe Acrobat File (.pdf).
   Result: *A window appears for you to type a name for your export file.*
   Note: *Certain grids also allow export to Constant Contact or Exact Target (if*

you own the interface with those services).



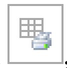
4. Enter a name for the exported file. Note the directory in which the file is being saved.
   Note: *You can easily change the export directory by clicking the down arrow next to the* <u>*Save In*</u> *field at the top of the window and selecting another directory.*

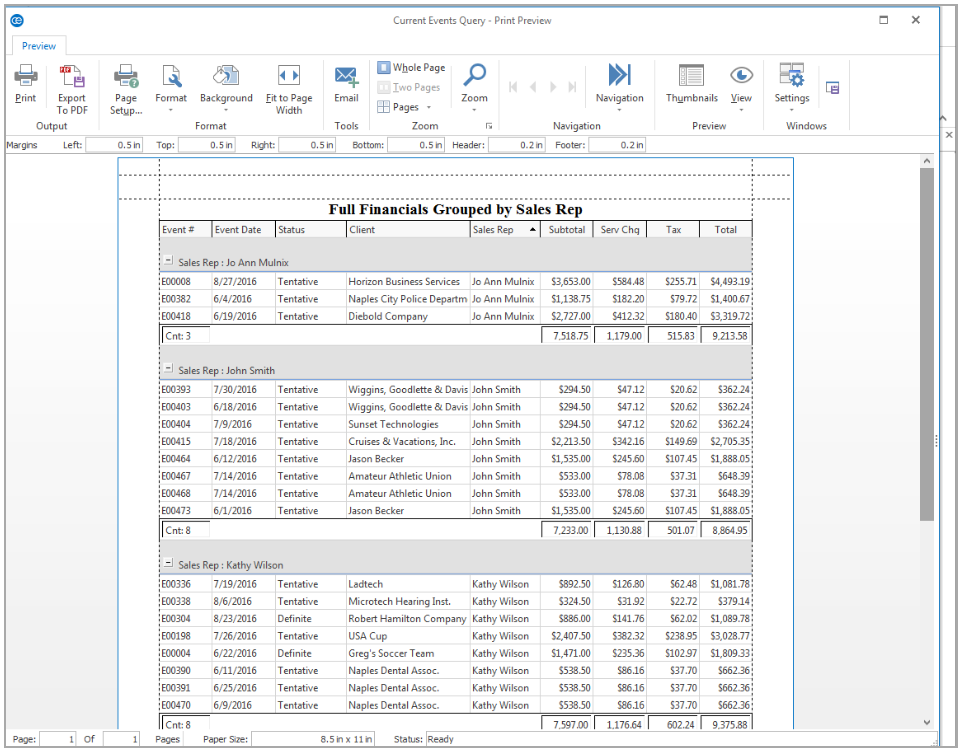
5. Click **Save**.
   Result: *A prompt will appear, and your export file has been created.*
   Note: *If you have the Professional version of Caterease, this prompt will offer to open your export file for you automatically. If you have the Standard or Express version, you will need to open a third-party application on your own and seek out the export file.*

Printing Grids

Tip: *You can optionally scale the size of text on your grid print to have it better fit on the page.*

1. Customize the detail grid as described in topics above.

2. Click the **Print Grid** button , located on the right-hand side of the grid.
   Result: *A preview of the grid print displays.*



3. **[Optional]** On the print preview screen, click the **Page Setup** button to adjust paper size/orientation, margin sizes, header/footer or to scale the size of the printed text (to prevent words or columns from cutting off) - or the **Format** button to format title, footnotes, page numbering, or date and time.

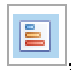
4. Click the **Print** button at the top left of the print preview window to send the grid print to your printer.
   Note: *As an alternative, you can click the* ***Export to PDF*** *button to save the grid print as a PDF file.*

5. When finished, close the print preview window.

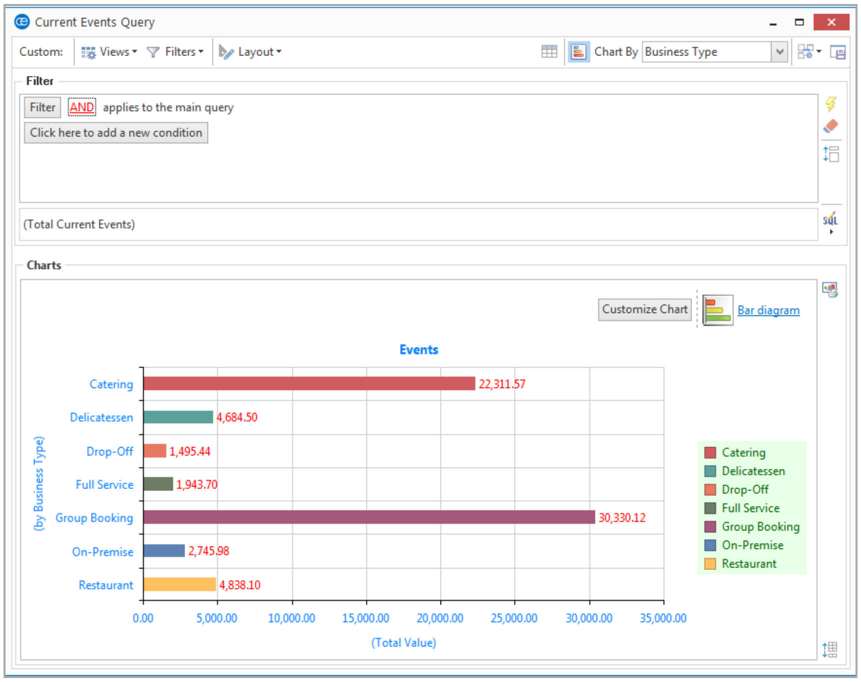
Viewing Grid Results in a Chart or Graph

In addition to displaying results of your Caterease queries in a detail grid, the Professional version of the program lets you view these results in a graphic chart view, showing you information in a bar graph format, or pie chart, or line graph, etc. You can control what detail the records are charted or graphed by, and you can even add additional information (such as cost, profit, etc.), to the charts. These options are perfect for quick reference or for presentation purposes.

Viewing Grid Results in a Chart

1. Click the **Chart View** button , located at the top right-hand side of a query results grid.
Result: The grid display changes to a chart.

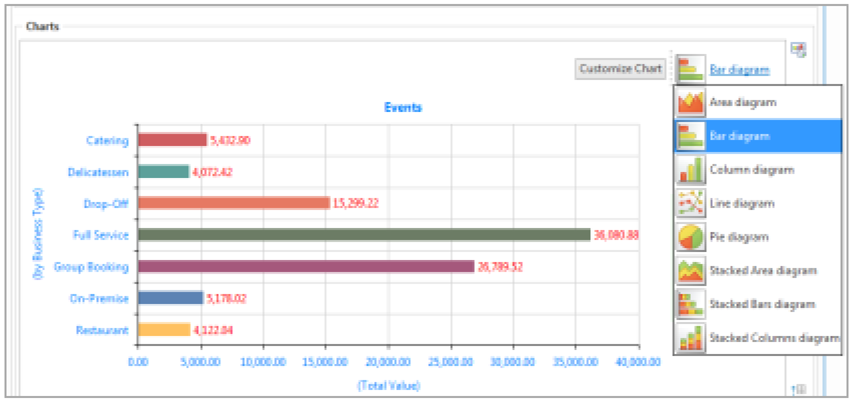
2. **[Optional]** Click the down arrow to the right of **Chart By** (top of display) to choose a different criterion on which to base your chart.
Result: The chart updates to reflect your changes.



Switching Chart Types

1. Click **Bar Diagram** at the top right of the chart.
Result: A drop-down list of chart options appears.

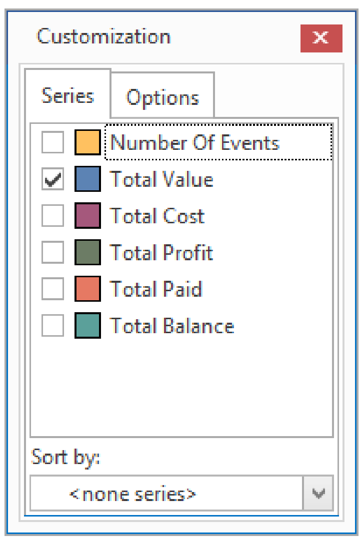
2. Click a different chart type to select it.



Customizing the Chart

1. Click **Customize Chart** at the top right-hand side of the chart.
   Result: *A Customization window opens.*

2. Set optional settings on the **Series** and **Options** tabs by clicking the radio buttons.



3. Click the  at the top right-hand corner of the Customization window to close it.

Unit 3: Creating a Custom Event Query

The Event Query is perhaps the most popular and most powerful query tool Caterease has to offer. Using this feature, you can search through your entire database of events and find only those records that match certain conditions you set. For example, you could search only those events that take place during a certain date range, or only those events with a certain theme, or only those events with a certain sales representative. You could also search for only those events that take place during a certain date range and have a certain theme and a certain sales representative. Any information you need is available at your fingertips.

Objectives:

Upon completing this unit, you will be able to:

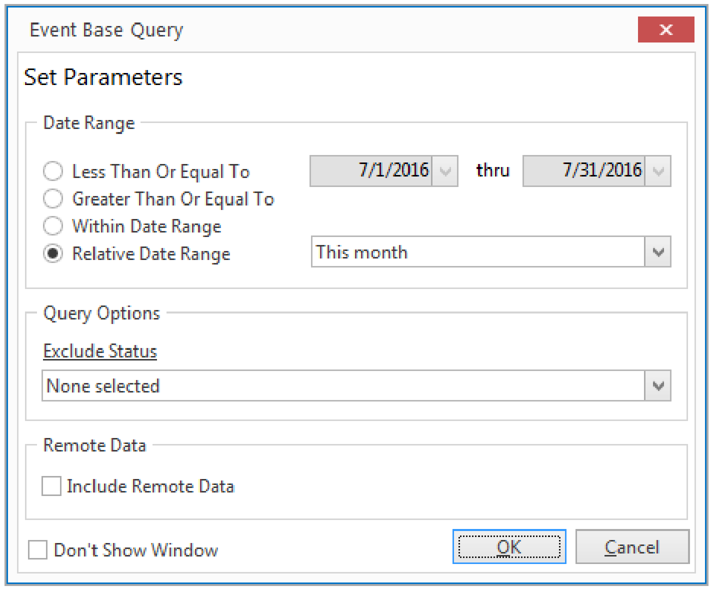
- *Track all events in your program based on any search conditions.*
- *Add multiple query conditions.*
- *Use relative date ranges to query events.*
- *Set conditions for your query.*
- *Save custom queries for future use.*

Querying Events

Running an Event Query

__Tip:__ As an option, click the checkbox labeled __Don't Show Window__ at the bottom left of the tool to have the Event Query open automatically as soon as your results are generated.

1. Click the **Queries** sidebar on the left-hand side of the screen.
2. Click the **Event Query** button.
   Result: *The Event Base Query window opens.*

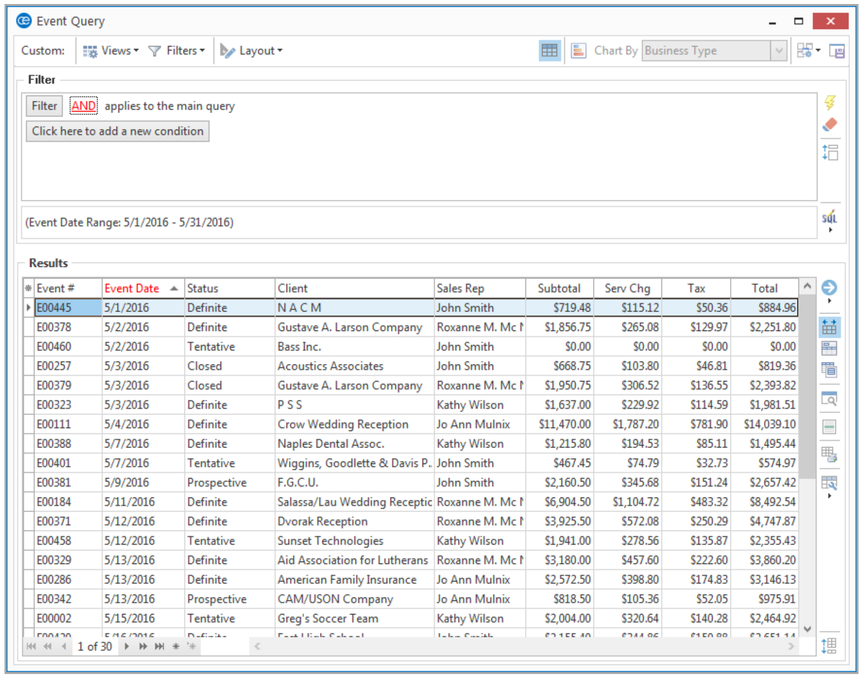


3. Set a **Date Range** for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query.

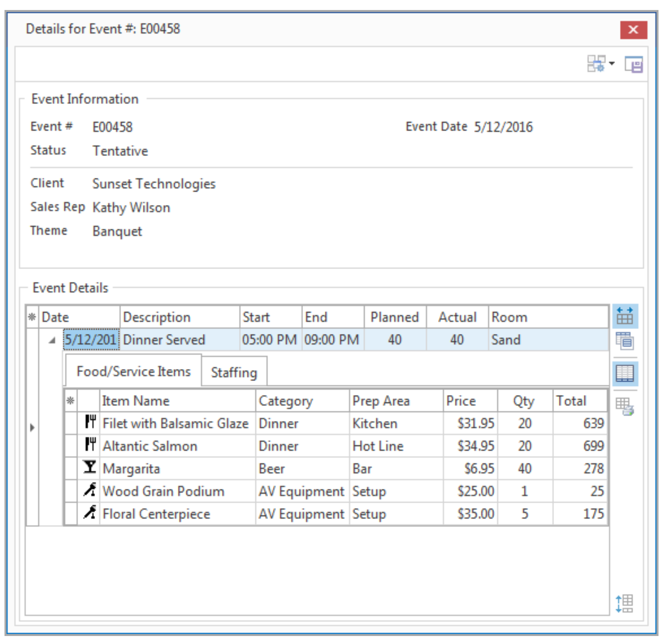
4. Optionally exclude any statuses by selecting an option from the drop-down list to the right of the Exclude Status field.

5. Optionally click into the **Include Remote Data** checkbox (visible only if this feature has been enabled in your Global Settings)if you would like remote data to be included in your query results.

6. Click **OK**.
   Result: *The Event Query is generated.*



7. **[Optional]** If you would like to view sub-event details, click the **View Details** button , located on the right-hand side of your screen.
Result: *The Details window opens.*



8. **[Optional]** Click the expand button, located to the left of the field, to drill down to a second grid, which lists sub-event details.
Note: *This second grid can be manipulated in the same ways as the main*

*grid. Use the **Quick Column Customizing** button to access additional fields.*

Grouping Query Conditions

While you can easily create a query to search for records with one quality OR another (for example, events with a theme of "Meeting" OR of "Seminar"), you might want to get a little more creative. For example, what if you want to find events with a theme of "Meeting," but only those belonging to you OR your assistant? Or perhaps you want to find all of your events that took place last summer OR the summer before. Likewise, you may want to apply this same logic to account queries or guestroom queries. In these cases, you will likely need to group your query conditions as described in this topic.

Grouping Query Conditions

1. Create a basic query as desired following the steps outlined previously.
2. Click the ellipsis button to the left of one of your query conditions.
   Result: *A pop-up menu appears.*
3. Click **Add A New Group**.
   Result: *A new group is created with the default first condition of "Event # equals <empty>," and with the statement that "AND" will apply to your new group.*
   Note: *If you are performing an Accounts Query, your default first condition will pertain to "Client"; if you are performing a Guestrooms Query, it will pertain to "Arrival" date.*
4. Click on the word **AND** in the line "AND applies to the group" at the beginning of your new group.
   Result: *A drop-down list of options appears.*
5. Select the desired option: And, Or, Not And, Not Or.

Option	Description
And	This option means the records that result from this query must match the original criteria you set, and all of the criteria you create in this group.
Or	This option means the records that result from this query must match the original criteria you set, and any one of the criteria you set in this group - either the first condition in the group OR the second OR the third, etc.
Not And	This option means the records that result from this query must match the original criteria you set, but not all conditions in this group. They can match one or another, but NOT the first AND the second AND the third, etc.
Not Or	This option means the records that result from this query must match the original criteria you set, but not any of the conditions in this group - NOT the first condition in the group OR the second, etc.

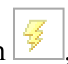
6. Click on **Event #** in the first condition of your new group, and choose any condition from the drop-down list.
   Result: *You are establishing the initial criterion for your query.*
   Note: *If you are performing an Accounts Query, you will click on the word **Client**; if you are performing a Guestrooms Query, you will click on the word **Arrival**.*

7. Click on the word **equals** next to your criterion and choose any option.
   Result: *Your selection replaces the word "equals" in your condition.*

8. Click on the final word in the condition **<empty>**, and choose a value for the condition to be compared to.

9. Click on the **Click here to add a new condition** button.
   Result: *A new default query condition is added to your new group.*

10. Repeat Steps 6-8 as necessary to add more conditions to your group.

11. Click the **Perform Query** button , located on the upper right-hand side of the window.

Changing the Conjunction in a Query

Conjunctions are every bit as important in a Caterease Event Query as they are in everyday language. For example, imagine you wanted to find all events you have with a theme of Meeting **or** Seminar. That is very different from telling the program to find all events with a theme of Meeting **and** Seminar. (Incidentally, the latter would yield no results, since no event can have a theme that is both Meeting and Seminar.) Therefore, as in speaking, you've got to choose the correct conjunction!

Changing the Conjunctions in a Query

1. Generate a query, such as an Event Query (**Queries** sidebar > **Event Query**).

2. In the **Filter** area at the top of the Event Query window, click on the word **And** in the line **AND applies to the main query**.
   Result: *A drop-down list of options appears.*

3. Select the desired option for your query.

4. Establish your query conditions.

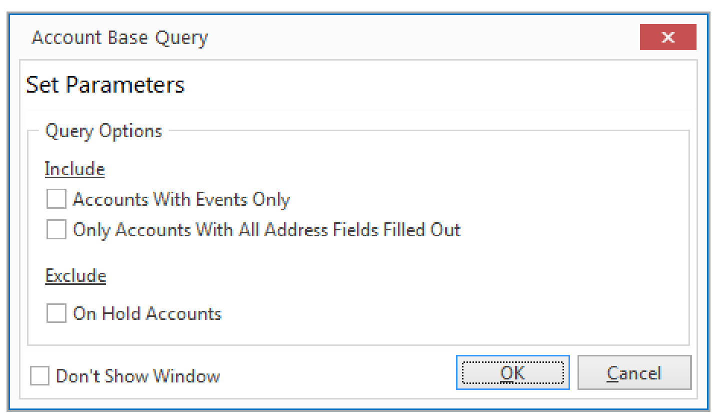
5. Click the **Perform Query** button .

Querying Your Customer Database

In addition to querying events, you may want to query your list of customers as well. For example, you may want to determine how many customers you have who do not have fax numbers on record with you; or how many customers heard of you from a particular reference; or how many customers are corporate clients, as opposed to government or educational entities. Any of these conditions, and more, can be used in your Account Query tool.

Querying Your Customer Database

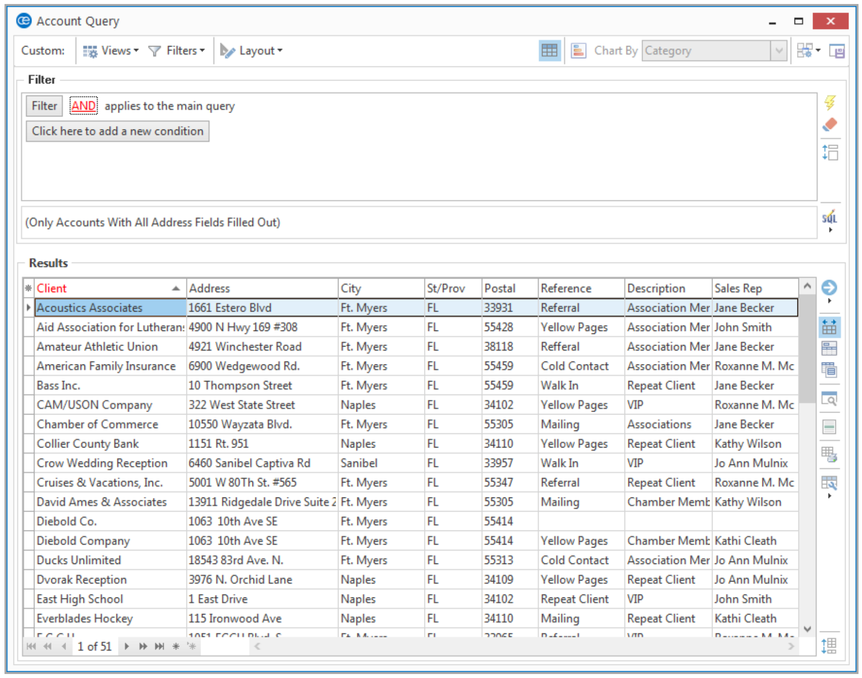
1. Click the **Account Query** button from the **Queries** sidebar group.
   Result: *The Account Base Query window opens.*



2. Select your base query options:

   - Click into the **Include** checkboxes to include Accounts with Events Only and/or Only Accounts With All Address Fields Filled out.
   - Click into the **Exclude** checkbox to exclude On Hold Accounts.

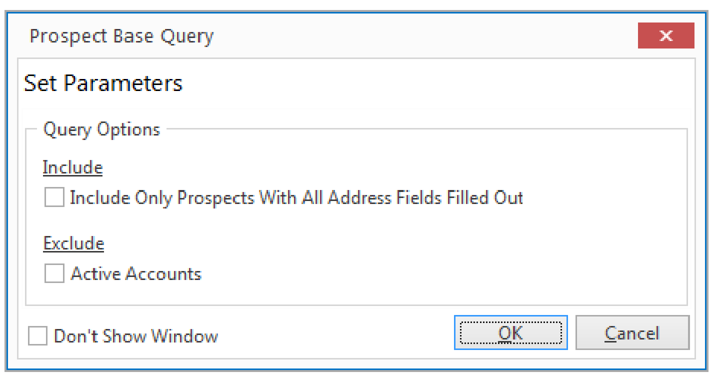
3. Click **OK**.
   Result: *The Account Query is generated.*



Querying Your Prospective Customers

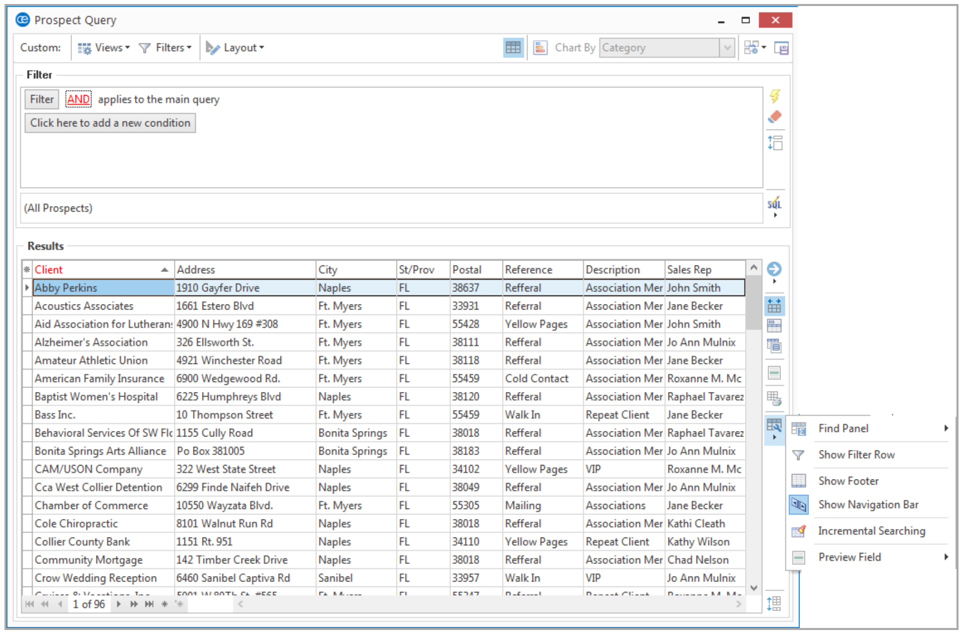
> ***Tip:*** *Your Prospect Query helps you separate your prospective customers (leads) from your active ones. Therefore, this query differs from the previous one because it also contains your list of prospective customers, so you can more easily market to them.*

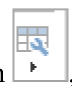
1. Click the **Prospect Query** button from the **Queries** sidebar group.
   Result: *The Prospect Base Query window opens.*



2. Select your base query options:
   - Click into the **Include** checkbox to Include Only Prospects With All Address Fields Filled Out.
   - Click into the **Exclude** checkbox to exclude Active Accounts from your query.

3. Click **OK**.
   Result: *The Prospect Query is generated.*



4. Optionally click the **Grid Tools** button , located on the right-hand side of your screen, to enable additional features.

Using Relative Date Ranges in an Event Query

Relative date ranges are an excellent way to set common date ranges for your query. These ranges are always relative to the current date (yesterday, this week, next month, etc.). There are two benefits to using a relative date range, as opposed to choosing specific dates for your range. First, it's obviously faster and easier. Secondly, and perhaps most important, you can save queries with relative date ranges and pull them up at any future time. "This month," after all, will mean the current month, no matter what date you run the query.

Using Relative Date Ranges in an Event Query

1. Generate a query, such as an Event Query.

2. Click on the Click here to add a new condition button.

3. Click on the words **Event #** in the condition and choose **Event Date** from the drop-down list.

4. Click the word **equals** next to your criterion.
   Result: *A list of comparison options drops down.*

5. Select the relative date range you would like to use for this query.
   Note: *Relative date ranges are date ranges that are relative to the current date. Examples include: yesterday; this week; next month; last year; past; future; etc.*

6. Click the final word in the condition ,**<empty>**, and choose a value for the relative date to correspond with.

7. Click the **Perform Query** button .
   Result: *The query returned all results from an event date which occurred within the relative date range you specified.*

Unit 4: Using "Activity" Queries

Objectives:

Upon completing this unit, you will be able to:

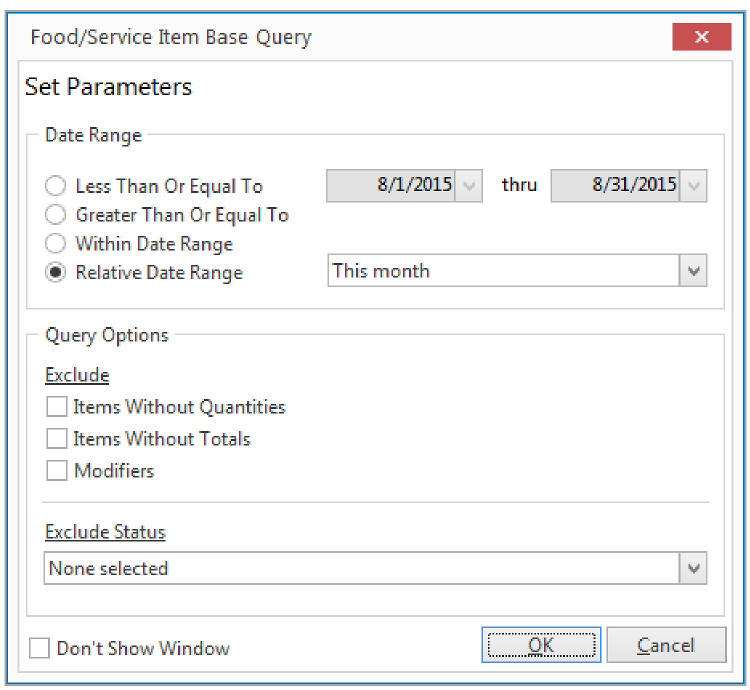
- *Track all menu items ordered for any date range.*
- *Use Relative Date Ranges in activity queries.*
- *Print and customize food/service item labels.*
- *Track all payment activity for any date range.*
- *Track all staffing for any date range.*
- *Track all sub-event activity for any date range.*

Tracking Menu Item Activity

The Food/Service Activity Query is a flexible tool that allows you to track any menu items you have ordered for any day or date range. Using this powerful feature, you can filter, sort, and group your data to find answers to such questions as, "Which venue has sold the most rental equipment?" or "Which sales representative is doing the best with this month's wine contest?" All food, liquor, equipment, and service item revenue can be tracked any way you want.

1. Click the **Queries** sidebar on the left-hand side of the screen.

2. Click the **Food/Service Items Query** button.
   Result: *The Food/Service Items Base Query window opens.*



3. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query (see below).

4. **[Optional]** Choose to exclude items that have no quantities, no totals, or no modifiers, using the checkboxes at the lower left of the Food/Service Base Query window.

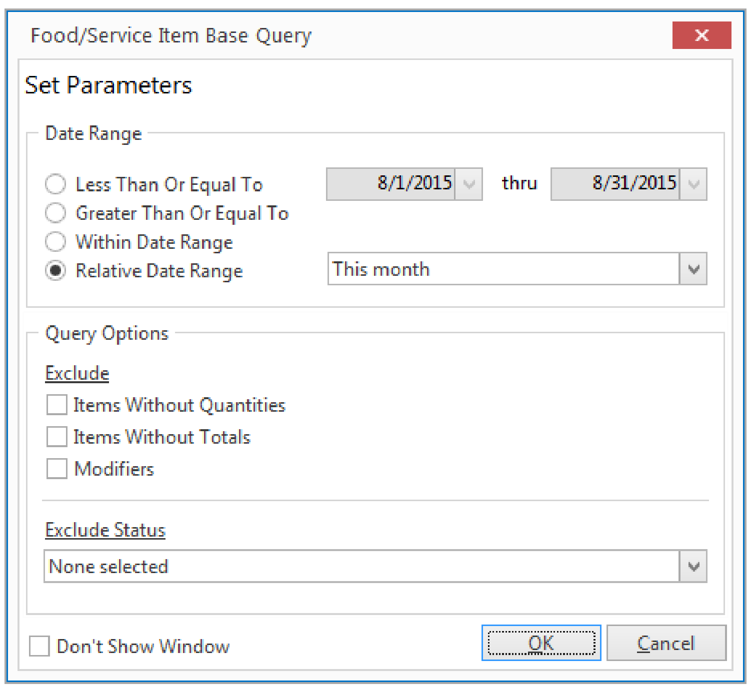
5. Click **OK** to generate the query.

Using a Relative Date Range

As mentioned in the previous unit, relative date ranges are an excellent way to set common date ranges for your query. Again, these ranges are always relative to the current date, which makes them very flexible for querying information.

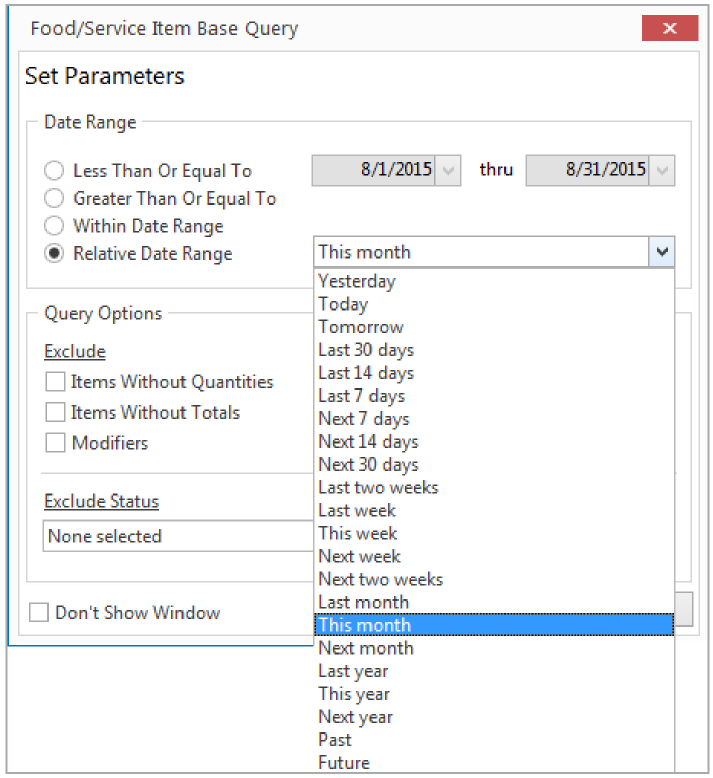
1. Click the **Queries** sidebar on the left-hand side of the screen.

2. Click the **Food/Service Items Query** button.
   Result: *The Food/Service Items Base Query window opens.*



3. Click the radio button next to **Relative Date Range**.

4. Click the down arrow to the right of the Relative Date Range field and select an option from the drop-down list.



5. **[Optional]** Choose to exclude items that have no quantities, no totals, or no modifiers, using the checkboxes at the lower left of the Food/Service Base Query window.

6. Click **OK** to generate the query.

Printing Menu Item Labels

Sometimes it's handy to have labels for your food/service menu items. Whether you are packing them for an off-premise event, or whether you just need a quick reference for chafing dishes or trays, labels can be quickly generated from your Food/Service Items Query. (This feature is available in the Professional version.)

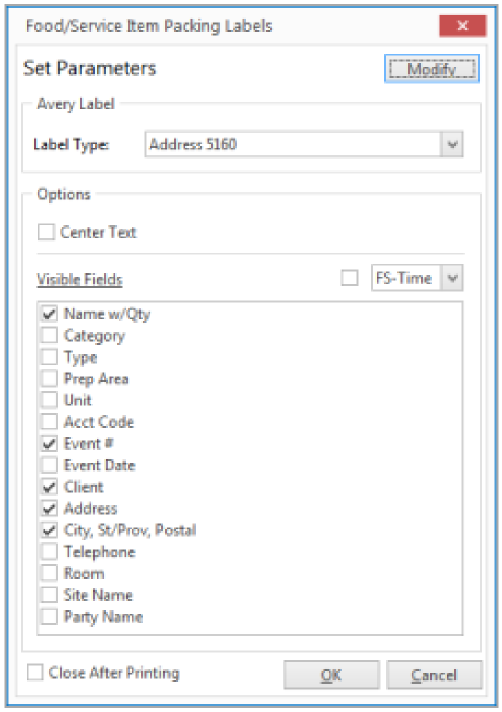
Printing Menu Item Labels

1. Generate a Food/Service Items Query.

2. Click on a menu item in your query results grid to select it, or hold your **[Ctrl]** key or **[Shift]** key down to select multiple items.
*Note: The [Ctrl] key lets you select multiple records; the [Shift] key selects two records and all others in between them. You can also click your right mouse button over the grid and choose **Select All Records**.*

3. Click the bottom half of the **Prints** button, located in the **Home** ribbon tab at the top of your screen.

4. Click **Food/Service Query** > **Food/Service Labels**.
Result: *The Food/Service Item Packing Labels window opens.*



5. Click on an Avery Label format from the **Label Type** drop-down list.

6. Click into any checkbox or checkboxes under **Visible Fields** to choose which information you want to appear on the labels.

7. **[Optional]** Click into the checkbox next to **Center Text**, under **Options**, if you want the text you chose in Step 6, above, to be centered on the label.

8. Click **OK** when finished.
Result: *A Print Preview of the labels appears.*

9. Click the **Print** button to print the labels.

Modifying Menu Item Labels

At times, you may want to make a one-time-only modification to one or several of your menu item labels before you send them to the printer. Perhaps you need to include a note on the label, or perhaps you need more than one label for a particularly large item. Making modifications to your labels can be done easily from the Food/Service Query.

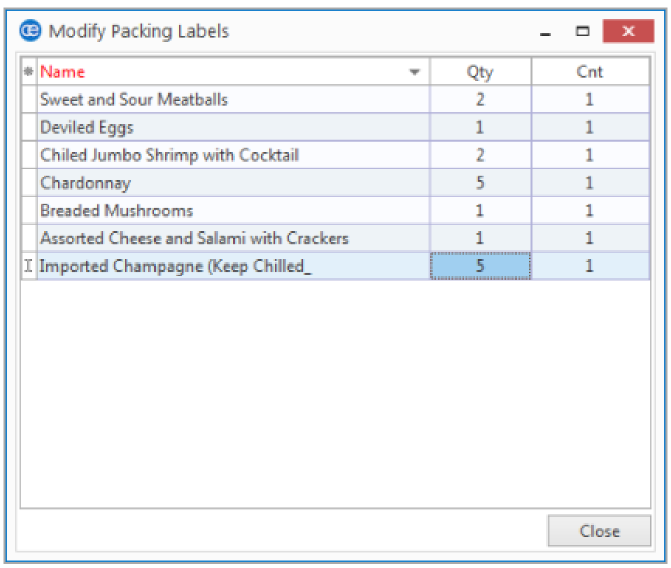
1. Follow Steps 1-7, above, to select your Avery Label style and designate the optional information to appear on each label.

2. Click the **Modify** button at the top right of the Food/Service Item Packing Labels window.
   Result: *The Modify Packing Labels window opens.*

3. Click into any column on the Modify Packing Labels window and edit the information as desired.
   Note: *These are one-time-only changes.*

4. Click **Close** when finished.

5. Click **OK** on the Food/Service Item Packing Labels window to generate your Print Preview.



Available fields are listed below:

Option	Description
Event #	This reflects the Event #, and cannot be edited.
Event Date	This reflects the Event Date, and cannot be edited.
Item Name	Type here to edit the name of a menu item as it appears on your label. For example, if a particular menu item cannot be packed into one box, you might add the words "2 Boxes" to the end of its name on the label (then see **Cnt**, below). Note that this number only appears on the label if "Name w/Qty" has been selected as an option.
Qty	This is the quantity of menu items included, and can be edited as desired. Note that this number only appears on the label if "Name

Option	Description
	w/Qty" has been selected as an option. (See Step 6, "Printing Menu Item Labels.").
Cnt	If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary count here. Simply type as desired, and whatever number you type will be the number of labels generated for that item.
Client	Type here to edit the Client/Organization.
Address	Type here to edit the mailing address.
City	Type here to edit the city where the customer resides.
St/Prov	Type here to edit the state or province where the customer resides.
Postal	Type here to edit the ZIP code where the customer resides.
Telephone	Type here to edit the recipient's telephone number.
Room	Merges in the name of the room of the event's first sub-event.
Site Name	Merges in the name of the off-premise site location of the event's first sub-event.
Party Name	Merges in the party name of the event. e.g., "Smith Wedding Reception," "Jones Birthday Party," etc.
Prep Area	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field.)
Category	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field.)
Acct Code	Click the down arrow to the right of this field to select an option from the quickpick list (or you may type directly into the field.)
Unit	If a menu item requires multiple labels (perhaps for multiple boxes, as described above), you can enter the necessary unit here. Simply type as desired, and whatever number you type will be the number of labels generated for that item.

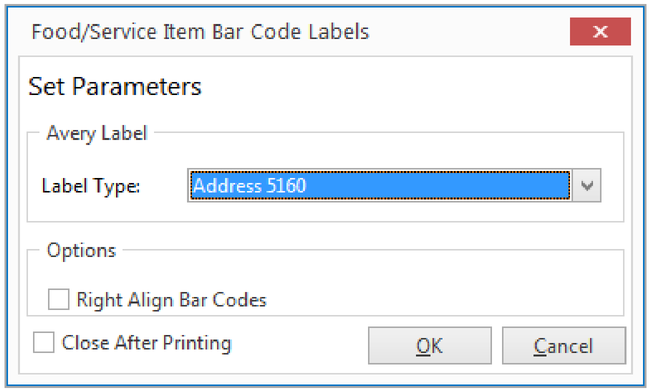
Printing Bar Codes

For Professional version users, you can enter bar codes for each of your various menu items, and have those bar codes optionally appear on any of your custom event prints or even on their own Bar Code Labels. This section discusses the latter topic, and assumes you have already entered your bar codes into Menu Manager or Event Manager.

Printing Bar Codes

__Note:__ To enter bar codes into Event Manager, click the __Quick Column Customizing__ button on the Sub-Event display, __Food/Service__ tab, and select __Bar Code__. Type the bar code into the Bar Code field and save your changes.

1. Generate a Food/Service Items Query.
2. Click on a menu item in your query results grid to select it, or hold your **[Ctrl]** key or **[Shift]** key down to select multiple items.
   __Note:__ The __[Ctrl]__ key lets you select multiple records; the __[Shift]__ key selects two records and all others in between them. You can also click your right mouse button over the grid and choose __Select All Records.__
3. Click the bottom half of the **Prints** button, located in the **Home** ribbon tab at the top of your screen, and choose **Food/Service Query** > **Food/Service Bar Codes**.
   Result: *The Food/Service Item Bar Code Labels window opens.*



4. Select an Avery Label type by clicking the down arrow to the right of the Label Type field.

5. **[Optional]** Click into the checkbox next to **Right Align Bar Codes** if you would like the bar codes to be right-aligned.

6. Click **OK** when finished.
   Result: *A Print Preview of the bar codes appears.*

7. Click the **Print** button, located on the upper left-hand side of your screen, to print the bar codes.

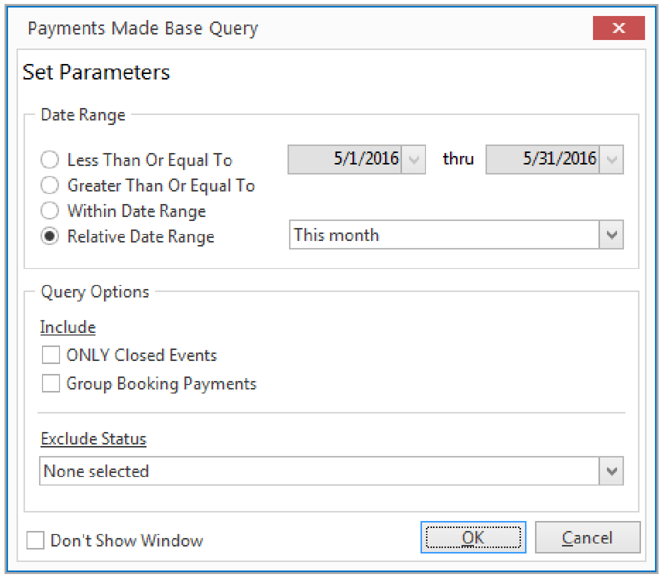
Tracking Payments Activity

The Payments Made Query tracks all payments made to your company during any day or date range. Again, the same powerful grid tools are available, such as sorting, filtering, or grouping your data. Thus, you can use this tool to answer such questions as "Which sales representative has received the most credit card payments this month?" or "What has been my most common method of payment this year?"

Tracking Payments Activity

1. Click the **Queries** sidebar on the left-hand side of the screen.

2. Click the **Payments Query** button.
   Result: *The Payments Made Base Query window opens.*

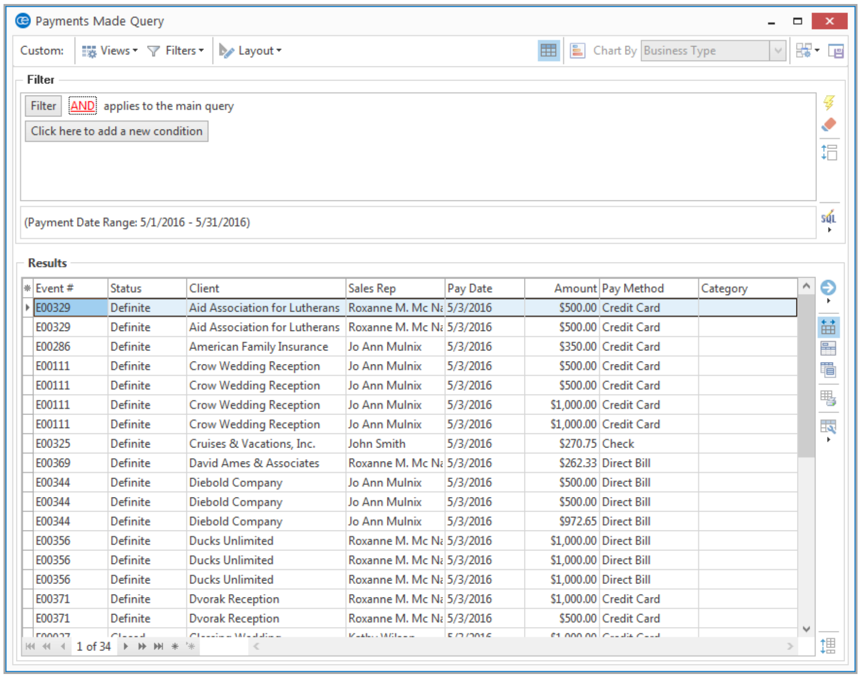


3. Set a **Date Range** for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, or **Within Date Range**, or choose a **Relative Date Range** for the query.

4. **[Optional]** Use the checkboxes at the lower left of the Payments Made Base Query window to choose to include only events that have been closed, or to include payments made on group bookings (for hotels, inns, etc.).

5. Click the down arrow to the right of the <u>Exclude Status</u> field to exclude any statuses (Closed, Cancelled, etc.).

6. Click **OK**.
Result: *The Payments Made Query is generated.*

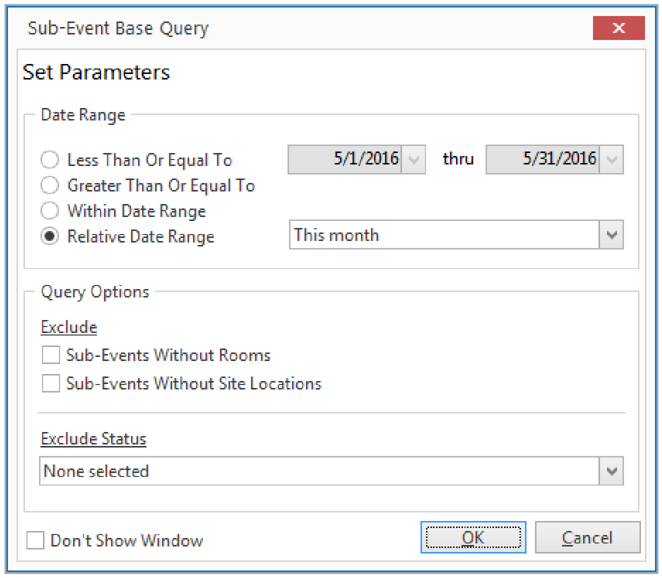


Tracking Sub-Event Activity

This activity query is focused on your sub-events, in other words, the individual meals you have served. For example, you can use this to track how many "Dinner Buffets" you've had during a particular date range or which type of sub-event has generated the most revenue, etc.

Tracking Sub-Event Activity

1. Click the **Queries** sidebar on the left-hand side of your screen.
2. Click the **Sub-Event Query** button.
   Result: *The Sub-Event Base Query window opens.*

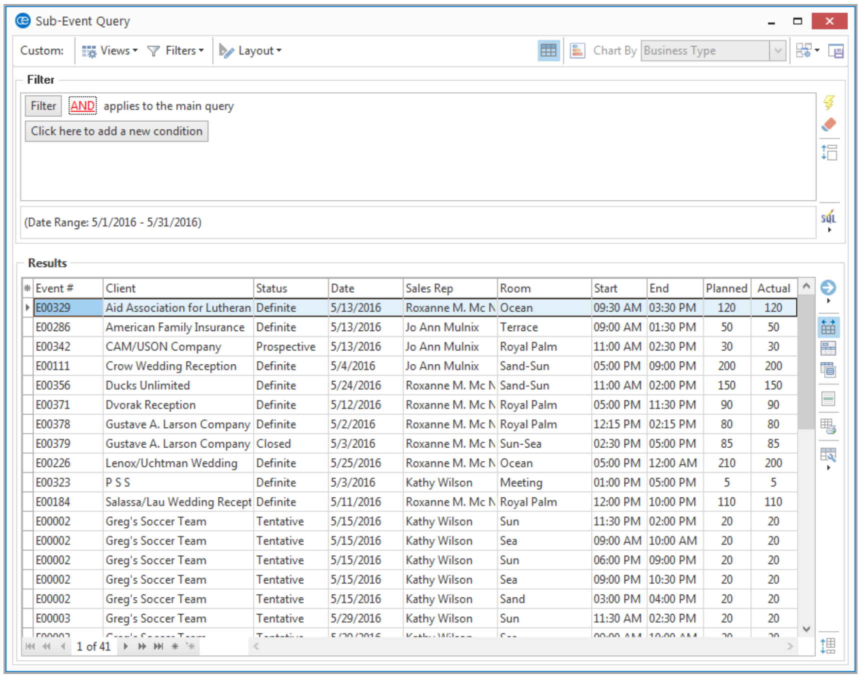


3. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To**, or **Within Date Range**, or choose a **Relative Date Range** for the query.

4. **[Optional]** Use the checkboxes at the lower left of the Sub-Event Activity Query window to choose to exclude sub-events that have no banquet room or off-premise site location information.

5. Click the down arrow to the right of the Exclude Status field to exclude any statuses (Closed, Cancelled, etc.).

6. Click **OK**.
   Result: *The Sub-Event Query is generated. The tools in this grid allow you to show or hide details, sort data, group data, export information, or even print custom grids.*



Event #	Client	Status	Date	Sales Rep	Room	Start	End	Planned	Actual
E00329	Aid Association for Lutheran	Definite	5/13/2016	Roxanne M. Mc N	Ocean	09:30 AM	03:30 PM	120	120
E00286	American Family Insurance	Definite	5/13/2016	Jo Ann Mulnix	Terrace	09:00 AM	01:30 PM	50	50
E00342	CAM/USON Company	Prospective	5/13/2016	Jo Ann Mulnix	Royal Palm	11:00 AM	02:30 PM	30	30
E00111	Crow Wedding Reception	Definite	5/4/2016	Jo Ann Mulnix	Sand-Sun	05:00 PM	09:00 PM	200	200
E00356	Ducks Unlimited	Definite	5/24/2016	Roxanne M. Mc N	Sand-Sun	11:00 AM	02:00 PM	150	150
E00371	Dvorak Reception	Definite	5/12/2016	Roxanne M. Mc N	Royal Palm	05:00 PM	11:30 PM	90	90
E00378	Gustave A. Larson Company	Definite	5/2/2016	Roxanne M. Mc N	Royal Palm	12:15 PM	02:15 PM	80	80
E00379	Gustave A. Larson Company	Closed	5/3/2016	Roxanne M. Mc N	Sun-Sea	02:30 PM	05:00 PM	85	85
E00226	Lenox/Uchtman Wedding	Definite	5/25/2016	Roxanne M. Mc N	Ocean	05:00 PM	12:00 AM	210	200
E00323	P S S	Definite	5/3/2016	Kathy Wilson	Meeting	01:00 PM	05:00 PM	5	5
E00184	Salassa/Lau Wedding Recept	Definite	5/11/2016	Roxanne M. Mc N	Royal Palm	12:00 PM	10:00 PM	110	110
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sun	11:30 PM	02:00 PM	20	20
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sea	09:00 AM	10:00 AM	20	20
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sun	06:00 PM	09:00 PM	20	20
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sea	09:00 PM	10:30 PM	20	20
E00002	Greg's Soccer Team	Tentative	5/15/2016	Kathy Wilson	Sand	03:00 PM	04:00 PM	20	20
E00003	Greg's Soccer Team	Tentative	5/29/2016	Kathy Wilson	Sun	11:30 AM	02:30 PM	20	20

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