

Enter Menu Details

1. If the information prompt 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 and select, from the right-hand side of the screen, the items you would like to add.
3. Add a custom menu item to an event by clicking the **Add A New Food/Service Item** button , located on the right-hand side of the **Food/Service** tab.
4. Enter the name, price, and quantity of the menu item. (Ensure the item type, located on the far right-hand side of the window, is correct).

See [Tip of the Week-Choosing Menus](#).

Generate the Contract (or Other Print)

1. From the open event in Event Manager, click the down arrow on the **Prints** button, located at the top of the screen.
2. Click **Event Contracts and Invoices** and choose **Contract** (or other desired print).
3. From the Print Preview screen, click the **Print** button, located on the upper left-hand side of the screen.

E-mail the Contract (or Other Print)

1. From the Print Preview screen, click the **Email** button, located at the top of the screen.
Note: *The print will be attached as a PDF.*
2. Type a subject into the **Subject** field or select an option from the quickpick list at the right of the field.
3. Type the e-mail body or select a custom merge letter by clicking the **Merge Doc** button (available with the Marketing Tools add-in).
4. Attach additional prints/files as desired.
5. Click the **Send** button.

See [Tip of the Week-Emailing the Contract](#).

Additional Resources

[Caterease Orientation Presentation](#)
[Booking Your First Event User Guide](#)
[Booking Your First Event Video](#)
[Program Setup Quick Reference Guide](#)
[Menu Manager Quick Reference Guide](#)
[Print Designer Quick Reference Guide](#)



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caterease™
catering & event management software

Quick Reference Guide:

Booking Your First Event



800.863.1616
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Access the Event Wizard

1. Click the **Events Wizard** button , located in the Quick Access Toolbar at the top left-hand side of your screen.

Note: The Event Wizard can be accessed from many areas within CaterEase. If you are in the Scheduler (**Main > Scheduler**), select a date on the calendar, right-click, and choose **New Event**.



Add a New Account/Contact Person (Step 1)

1. Click the **Add New Account** button , located at the top of the Event Wizard (Step 1) window.
2. Click **Yes** at the confirmation prompt.
3. Fill in the Client/Company details by typing directly into the fields provided (see image below).
4. When finished, click **OK**.

Note: If you are adding information for an individual, click the **Add a New Contact** button , and then click **Copy to Client** on the subsequent screen.

Last	First	Title	Telephone

Click this button if creating an account for an individual.

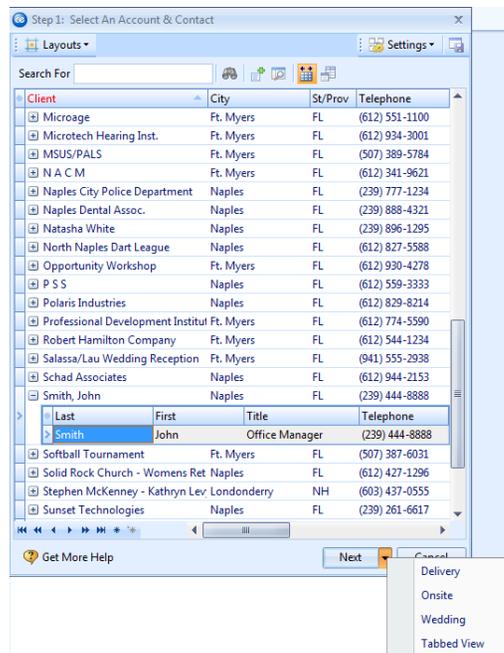
<No data to display>

See [Tip of the Week-Adding a New Customer \(or Account\)](#).

Choose a Wizard Layout

1. From Step 1 of the Event Wizard, click the down arrow to the right of **Next** and select the desired layout.

Note: Four layouts are deployed with your CaterEase program.



Customize a Wizard Layout

1. Right-click anywhere on the areas of the Wizard screen that do not allow data entry, and choose **Customize**.
2. To add a field to your screen, hold your left mouse button on any field in the **Available Items** pane and drag it into the desired location on your screen. To remove a field from the screen, click on a field (with the Customize window open) and drag it into the **Available Items** pane.
3. To remove an entire tab from the screen, right-click on a tab and choose **Customize**. Click on the tab heading (for example, click on the words "Venue Information" within the **Venue** tab). The entire section will become highlighted, enabling you to drag it into the **Available Items** pane.
4. Continue adding or removing fields or tabs as desired.

Important Note: Click the **Save Window Settings** button , located at the top right-hand side of the window, if you want the layout to serve as the default.

See [Creating Custom Event Wizards](#).

Complete the Informational Fields (Step 2)

Note: The entire screen can be customized to suit your preferences.

1. Enter details into simple text fields, such as the **Party Name** field, by simply typing into the field.
2. Click the down arrow to the right of various fields to access a list of quickpicks.
3. Enter a date by typing into the **Date** field or by accessing the drop-down calendar.
4. Enter times for the new event by typing directly into the fields or by clicking the **Time Wizard** button  and dragging and dropping times into position.
5. **[Optional—If Tabbed View is Selected]** For on-premise parties, click the **Venue** tab and select a Setup Style and Banquet Room.
6. **[Optional—If Tabbed View is Selected]** For off-premise parties, click the **Site** tab and enter the site information, including Name, Address, etc., or click the **Select Site Location** button  to select from a list of frequently used locations.
7. Enter text into text blocks (Notes, Directions, Setup Notes, etc.), by typing directly into the fields.
8. When finished, click **OK**.
9. Click **Yes** at the prompt to move to the menu-selection process.