Assign Required Items

- Click the Menu Manager button from the Setup sidebar. 1.
- In the left-hand pane of Menu Manager, click the title of 2. the menu you would like to add a required item to.
- 3. Click the **Required Items** tab at the bottom of the screen.
- Click the Select Items button at the right-hand side 4. of the Required Items window.
- 5. Highlight and select items.
- Enter a Default Qty for your required items. 6.
- 7. Click the **Quick Column Customizing** button is to access additional columns, such as Linked, where you can optionally link the quantity of this item to the number of corresponding menu items ordered in an event.

See Adding Required Items to a Menu Item.

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Additional Resources

Creating an Automatic Menu Item Package **Establishing Menu Item Modifiers** Adding Custom Menu Items On-the-Fly Make Changes to Menu Items in Batch Modifying Menu Item Ingredients or Required Items

Update Menu Costing

- From Menu Manager, click the Select button and choose 1. General.
- 2. Click Menu Costing Update > From Ingredients List.
- 3. Click the checkbox next to Update Menu Prices and enter a markup number to multiply cost by. Note: The Markup By field is entered as a decimal which is multiplied by the total cost of the menu item.
- Choose the desired Options by clicking into the 4. checkboxes.
- Click OK. 5.

See Updating Menu Costing.



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cotereose catering & event management software

Quick Reference Guide:

Menu Manager



800.863.1616 www.caterease.com

Set Up Food/Service Types

- Click the **Administration** ribbon tab. 1.
- 2. Click General > Food/Service Item Types.
- 3. Click into the Type field and type the new name over "N/A."
- 4. Click the down arrow to the right of the Image field and select an image from the drop-down list.
- Click into the checkbox under the Active field to activate the 5. new Food/Service Item Type.
- Click into the Associate Charges area to associate a Room, 6. Labor, Delivery, or Miscellaneous charge to the Item Type. Note: You will need to assign tax/service charge rates for the new item type.
- Drag and drop the item types into the desired position. 7.
- 8. Click OK.

See Setting Up Food/Service Types and Establishing Default Tax Rates.



Add a New Menu

- Click the Menu Manager button from the Setup sidebar. 1.
- Click the Add New Menu button 2. . located on the upper left-hand side of the screen.
- Click **Yes** at the confirmation prompt. 3.
- Type a name of the new menu and press [Enter]. 4.
- 5. Add a new menu item by clicking the Add Menu Item button E

located at the top of the Menu Manager window.

- 6. Type the name of the food/service item into the blank Name field and then press [Tab].
- Fill out the Price, Comment, Prep Area, etc., information as 7. desired.

Note: Click the Quick-Column Customizing button access optional fields.

8. When finished, click the X at the top right-hand side of the window.

Create an Ingredients List

- Click the Ingredients List button from the Setup sidebar. 1.
- Click the Add List button 2. , located on the upper left-hand side of the screen.
- 3. Click Yes at the confirmation prompt.
- Type a name for your new ingredients list and press [Enter]. 4. 5. Add a new ingredient by clicking the **Add Ingredient** button
 - Ē
 - located at the top of the Ingredients List window.
- 6. Type the ingredient name into the Description field and press [Tab] to move to the next field.
- 7. Enter the Unit, Measure, Type, and Cost into their respective fields.

Note: Click the Quick-Column Customizing button it to access optional ingredients list fields.

When finished, click the X at the top right-hand side of the 8. window.

See Creating a Master Ingredients List.

Assign Ingredients

- Click the Menu Manager button from the Setup sidebar. 1.
- 2. In the left-hand pane of Menu Manager, click the title of the menu you would like to add an ingredient to.
- Click the **Ingredients** tab at the bottom of the screen. 3.
- Click the Select New Ingredients button 4. Iocated on the right-hand side of the window.
- Highlight and select ingredients. 5.
- 6. Click OK to close the Select Ingredients window.
- 7. Click in the Qty column and enter a quantity for each ingredient item.

See Adding Ingredients to a Menu Item.

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Use the Menu Manager Tabs

- Click the Menu Manager button from the Setup sidebar. 1.
- 2. Click the **Description** tab, located at the bottom of the screen, and type as desired.

Note: The Name of your new menu item will be entered here as a default.

3. Click the Recipe, Label, Notes, and Modifiers tabs and enter text as desired.

Note: Use the formatting tools on the Home ribbon tab at the top of the screen to format the text you have entered.

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Set Up Required Items

- Click the **Required Items** button from the **Setup** sidebar. 1.
- Click the **Add List** button **I**, located along the lefthand pane of the window.
- Click **Yes** at the confirmation prompt. 3.
- 4. Type a name for your new required items list and press [Enter].
- Click the Add Item button 5. Required Items window.
- 6. Type an Item Description (Name) for the new item and press [Tab].
- 7. Select a Unit (of measurement) for the required item.
- 8. Optionally enter a Category, to be used for tracking the item, and a Comment.
- When finished, click the X at the top right-hand side of 9. the window.

See Creating a Master List of Required Items.