Complete the Notes Tabs

- 1. Click on the **Notes** tab.
- If necessary, fill out the <u>Optional Billing Address</u> fields. *Note:* This section refers to an alternate name and address (for billing purposes).
- 3. Enter text into **Notes** text block or paste notes from your Scratch Pad.
- 4. When finished, click **OK**.
- 5. Click **Yes** at the prompt to move to the food/service items selection process.

Enter Food/Service Item Details

- 1. Click the **Select Menus** button *interception*, 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.

 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 Event Wizard Step 3

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).
- From the Print Preview screen, click the Print button, located on the upper left-hand side of the screen.
 Note: To e-mail the print, click the Email button, located on the upper left-hand side of the print preview. The print will be attached as a .PDF.

See Customizing Quickpick Lists

Customize Your Quickpick Lists

- 1. Click the **Quickpick** button from the **Setup** sidebar group, located on the left-hand side of your screen.
- 2. Adding a Quickpick Item: Click the expand button to the left of a

category, or click the **Full Expand** button to view all categories.

3. Click on the desired quickpick list, then click the **Add New Item**

button with to add a blank field to the list.

- 4. Type the name of the quickpick item into the field.
- 5. Click Close.
 - Editing a Quickpick: Click on the quickpick item name, then type over the description.
 - Deleting a Quickpick: Click on the quickpick item, then click the

Delete Current Item button

• **Repositioning a Quickpick**: Hold your left mouse button down on the quickpick item, then drag it up or down within the list.

Additional Resources

Managing Staff for an Event Copying Events Copying Sub-Events Sending Email from Event Manager Printing Event Prints



a product of Horizon Business Services, Inc. Naples, FL 34102 T: 239.261.6617 F: 239.261.0067 www.caterease.com help@caterease.com



Quick Reference Guide:

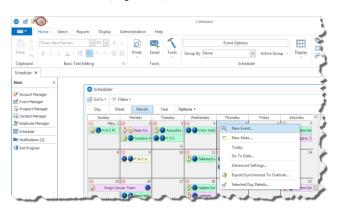
Booking Your First Event

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Access the Event Wizard

1. Click the **Event 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. **Note:** The confirmation prompt may not appear if disabled in Global Settings.
- 3. Fill in the Client/Company details by typing directly into the fields provided.
- 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.

See Event Wizard Step 1

Choose a Wizard Layout

 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.

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Complete the General Details

- 1. Enter details into simple text fields, such as the <u>Party Name</u> field, by simply typing into the field.
- 2. Click the down arrow to the right of various fields to access a list of custom quickpicks.
- 3. Enter a date by typing into the <u>Date</u> 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.

Seneral Ver	ue Delivery	Site	Not	es						
Event Inform	nation									
Party Name	Acoustics Associates									
Status	Definite									
Sales Rep	John Smith Banquet									
Theme										
Category	Social									
Reference	Repeat Client									
Guests			Date		٥					
Planned	100		Start	5/5/2016 v Thursday			sday			
Actual				05:00 PM	0	Serving		0		
Guaranteed	90			10:00 PM		Bar		0		
Sub-Event I	nformation									
Description	Dinner Served									
Type On-Premise								~		

See Event Wizard Step 2

Complete the Room Details

- 1. For on-premise parties, click the Venue tab.
- Select a <u>Setup Style</u> and <u>Banquet Room</u> for the event by clicking the down arrow to the right of each field and choosing an option from the list. *Note:* A Room Selection tool is available with the Banquet Rooms add-in module.
- Click the down arrow to the right of various fields to access a list of custom quickpicks.
 Note: Any required fields (in red) must be populated in order to save the event.
- 4. Optionally enter any setup/tear-down times.
- 5. Optionally type any Setup Notes into the **Setup Notes** text box or paste notes from your Scratch Pad.

General Venue Venue Informat Setup Style Setup Person Banguet Room	Delivery Site Notes	~		
Setup Person	Theatre	~		
			Setup	01:00 🗘
Ranguat Room		~	Tear Down	00:30 0
banquet Koom	Sand 🗸			
Room Category	Ballroom	~		
Room Charge	125.00	~		
 Red aisle c Stage with If any florals Registration Music - TBI 	heater style to number of guests arpet backdrop s provided - on stage 1 table with chair			

See Event Wizard Step 2

Complete the Site Location Details

1. For off-premise parties, click the **Site** tab and enter the site information, including Name, Address, etc., or click



the **Select Site Location** button from a list of frequently used locations.

Note: You can also click the **Copy from Client** button to select the client's address as the site.

2. Enter site location directions by typing directly into the **Directions** text box or text box or paste notes from your Scratch Pad.

See <u>Event Wizard Step 2</u>