



## Complete the Notes Tabs

1. Click on the **Notes** tab.
2. If necessary, fill out the Optional Billing Address 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 , 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 [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).
3. 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  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](#)



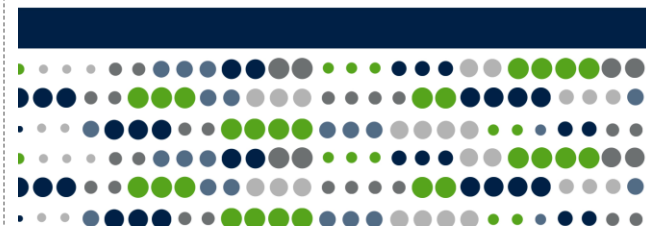
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## Quick Reference Guide:

## Booking Your First Event

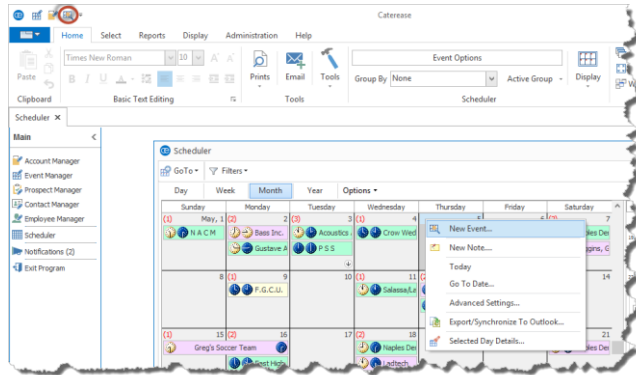
800.863.1616  
[www.caterease.com](http://www.caterease.com)




## 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.
3. Fill in the Client/Company details by typing directly into the fields provided.
4. When finished, click **OK**.

**Note:** The confirmation prompt may not appear if disabled in Global Settings.

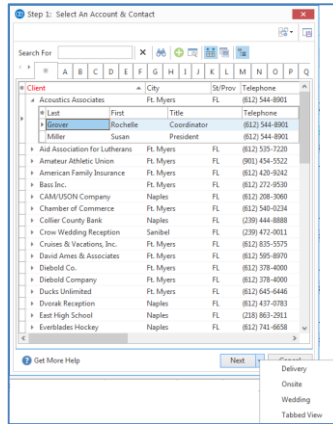
**Note:** If you are adding information for an individual, click the

**Add a New Contact** button  , and then click **Copy to Client** on the subsequent screen.

See [Event Wizard Step 1](#)


## Choose a Wizard Layout

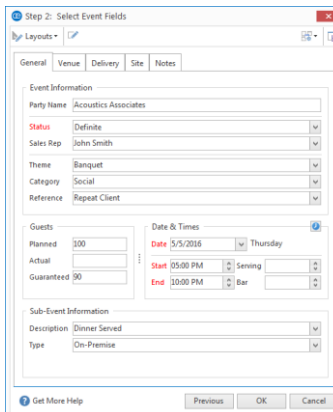
1. From Step 1 of the Event Wizard, click the down arrow to the right of **Next** and select the desired layout.
- Note:** Four layouts are deployed with your Caterease program.



## Complete the General Details

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 custom 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

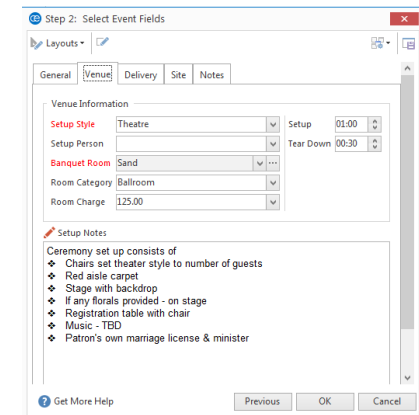
by clicking the **Time Wizard** button  and dragging and dropping times into position.



See [Event Wizard Step 2](#)


## Complete the Room Details

1. For on-premise parties, click the **Venue** tab.
2. Select a Setup Style and Banquet Room for the event by clicking the down arrow to the right of each field and choosing an option from the list.
3. Click the down arrow to the right of various fields to access a list of custom quickpicks.
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.



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  to select from a list of frequently used locations.
2. Enter site location directions by typing directly into the **Directions** text box or text box or paste notes from your Scratch Pad.

See [Event Wizard Step 2](#)