E-mail a Print

Copy an Existing Print

2.

- 1. Click the Email button, located on the upper left-hand side of the print preview. Note: The print will be attached as a .PDF.
- Type an e-mail subject into the Subject field. 2.
- 3. Type the e-mail body or select a custom merge letter.
- Attach additional prints/files as desired. 4.
- 5. Click the Send button.

Using the Miscellaneous Print Designer

- 1. Click the Miscellaneous Print Designer button, located on the Setup sidebar.
- 2. Click the **New Print** button , located at the top lefthand side of the window.
- Click into the Add A New Print checkbox. 3.
- Double-click on the title of the print you would like to 4. work with.
- 5. Type a title for your print, and then press [Enter].
- Click the **Edit Header** button (top right-hand side of the 6. window).
- 7. Type the desired Header, and then click **Close**.
- 8. Click the down arrow to the right of a field if you would like to select an alternate option from the drop-down list.
- 9. Click into the checkboxes located on the far right-hand side of the print to prevent certain sections from appearing on the print.
- 10. Click the **Preview** button, located at the top of the window.

Note: You must have an event open in Event Manager in order to preview your sub-print.

Event Checklist Event Deliveries	fla	võur	5						
Event Payments	CATE	BING + EVEN	TS						
- Event Deposits Event Recipes	1 0/11 0								
Fancy Menu	Title Pro	duction Sheet				Suppress He	ader Edit He	ader	
Details									
► Staffing	Client		Event Date			Site Contact	Event #		
Ingredients	Address			Telephone		Theme	Guests	Guests	
- Required Item List	Party Nam		Category	Sales Rep		Business Type			
Production Sheet Event Costing Summary	Edit Top	Notes Suppre	55						
Service Order	Format	Item Name		None	Price	Qty	Total		
- Menu Prep Sheet		New Page For	Fach Pren Area			Show Direction	м		
Production Sheet			rvice Item Comme	ents		Show Notes			
i roudetton sneet						Show Checkbo	0085		

See Miscellaneous Prints Designer

This section applies to the Event Sub-prints section of the Prints menu in Event Manager.

1. In Print Designer or Miscellaneous Print Designer, click on the title of the print you want to copy. *Note*: Available only in the Professional version. Right-click and choose Copy Print.

- 3. Click Yes at the confirmation message.
- 4. Type a name for the new copy, and press [Enter].

See Copying an Existing Print

Additional Resources

Editing Miscellaneous Prints Customizing Financial Information Sending Email from Event Manager



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:

Print Designer

800.863.1616 www.caterease.com



Add a New Print

- Click the **Print Designer** button from the **Setup** sidebar group. 1.
- Click the **Add Print** button , located at the top left-hand 2. side of your Print Designer window.
- Click Yes at the confirmation message. 3.
- Click into the checkbox to the left of Add A New Print. 4.
- 5. Choose a Print Format by clicking into the Lined or Shaded radio button.
- 6. Click on the desired design Layout (Contacts & Proposals/Invoices), and then click OK.
- Type a title over the words "New Print," and then press 7. [Enter].
- 8. Use your scroll bar, located on the right-hand side of the window, to scroll to the bottom of your Print Designer.
- 9. Click the down arrow to the right of the Print Type field.
- 10. Select the desired Print Type: Contact, Invoice, BEO, None.

See Adding a New Event Print in Print Designer

Customize the Header/Footer

- 1. From your Print Designer, click the Edit Header button (top right-hand side) or the Edit Footer button (lower left-hand side).
- 2. Click into one of the panels on the Header window, then click the Insert button, located at the top of the window, to browse to a logo or image.
- 3. Click the Fields button, located to the left of the Insert button, to add merge fields.
- 4. [Optional] Add a link to your company website by typing into the Hyperlink field.
- When finished, click Close. 5.

Header									
Paste Cut Copy Clipboard	Times New Roman B I U 🕾 🔺 -	v 10 v A' A' !⊟ !⊟ ≡ ≡ ≡ 至 至 至 X ₂ X Format							
Flav	NG + EVENTS	[Current Date Long]	Sales /Catering Con	rtract					
Hyperlink: http://	www.caterease.com		U	<u>C</u> lose					

See Customizing Event Prints in Print Designer

Customize and Suppress General Information

- 1. From your Print Designer, click the down arrow to the right of a field to select an alternate option from the drop-down list.
- 2. Click into the checkboxes located on the far right-hand side of the window to keep certain sections from appearing on the print. For example, you might opt to suppress financial information if your print is meant for your chef. Similarly, you might suppress ingredients for prints you send to your customers.

Invoice						[Current.Data Lo S			ales/Catering Contract		
Contract Kitchen Detail Chel's Copy		ess Header	EVENT	5					Edit Header	w	
- Contract with Staffing	Client/Or	ganization		Event Dat		Telephone	✓ Fax		Event #		
Contract - (Narrative)	Address				Clien		-	ontact	Guests		
- Dual Column Contract	Party Nar	ne		Theme	Addr	ess (Extended)		ory		~	
Custom Print	Edit To	p Notes 🔻	Suppre	55	City, StProv Postal Full Address Telephone			Show Allergy Alerts			
- Contrat en Francais				S	Fax					×	
Offsite Contract	Site Name			Site Addres	Cellu Emai					×	
				BA	Party	Name					
	Room	None	Start	Bar	Book	ing Contact ing Tel		m	Setup Style	×	
				FOO	Book	ing Fax ing Cell				7	
	Format	Description			Book	ing Email ing Full Address		Qty	Total	~	

toolti

Cust

- 1. From your Print Designer, click the down arrow to the right of the <u>Format</u> field, located towards the middle of the window.
- 2. Click into the boxes of the features you would like to display on your print. For example, click into the Picture checkbox if you would like to display any images you have uploaded.
- 3. Click the **Filter** button, located on the right-hand side of the Print Designer screen, towards the middle.
- 4. Select desired Type, Category, and Prep Area options by clicking the down arrow to the right of each field.

		100	D/SERVICE						
Format	Description;Picture	~	V None No		Price	Qty	Total	•	
	Time		1		None	one			
	Qty Item Name		Ingredients						
Description Notes			vent Staffing						
	Modifications		COMMENTS						
	✓ Picture Bar Code		VENT NOTES						

Customize Top Notes and Bottom Notes

- 1. From your Print Designer, click the Edit Top Notes button (upper left-hand side) or Edit Bottom Notes button (lower left-hand side).
- 2. Click into the desired panel, and then click the Insert button, located at the top of the window, to browse to a logo or image.
- 3. Click the Fields button, located to the left of the Insert button, to add merge fields.
- 4. Format the font as desired, by using the Format toolbar on the upper left-hand side of the window.
- 5. When finished, click Close.

					Top No	tes					
Cut	Arial			~ 10 ~	A' A'	I≣ (≣	5	🐺 Fields			
Paste S Undo	BI	<u>U</u> =	<u>A</u> ·	- = = =	<u>•</u>	X ₂ X ²		1 Tools	Insert	Scratch Pad	
Clipboard				Format					Tools		
PRICING BASED [CPG]. ANY CHA EVENT DATE. C	ANGES T	O GUA	RANTE	ED GUEST CO	DUNT ML						
[CPG]. ANY CHA	ANGES T	O GUA	RANTE	ED GUEST CO	DUNT ML						

See Customizing Event Prints in Print Designer

Preview and Print

1. Click the **Preview** button, located at the top of your Print Designer screen.

Note: You must have an event open in Event Manager in order to preview your print.

2. Click the Print button, located at the upper left-hand side of the print.

) 🗢 📲 🖛 😑 🗙	🕞 Print Type 🔹 🔨 To	ols - 🕞 Preview			B
Invoice Invoice Detailed Contract with Images Contract	[[]]			or: Event # (Even n: (Event Date Li	
··· Kitchen Detail ··· Chef's Copy	Suppress Header			Edit Header	Ŧ

		Room	None	Start	Bar	Booking Tel	m	Setup Style		
					FOO	Booking Fax Booking Cell			V 🛛 🕈	,
		Format D	escription			Booking Email Booking Full Address	Qty	Total	× 1	
-	haven when					Site Contact	3 Nor	ie and		
	•									
U	sing your i	mous	se, no	over	ove	r the check	DOX	es to	view	' the
ps.										
ps.										
				_						
	See <u>Cust</u>	comiz	ring E	ver	nt Pr	ints in Prin	t De	signer	r	
									-	
on	າize the	Me	nu S	Sec	tior	1				
						-				