## 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.

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#### 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



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## 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.

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#### 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.

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- 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.

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## **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.

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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.

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