

Creating a Quickpick List for a User-Defined Field

1. Click the **Setup** sidebar and choose **Quickpicks**.
2. Scroll to the bottom of the list of quickpicks.
3. Click the expand button to the left of the category labeled **User Defined Fields**.

Result: Any user-defined field you have created and formatted as a Text field will be listed here.

4. Click on the desired user-defined field to select it.
5. Click the **Add New Item** button , at the top right of the window, to add a new quickpick item.
6. Type the quickpick name into the field provided.
7. Click **Close** when finished adding user-defined quickpicks.

Displaying User-Defined Fields

1. Decide where on your Event Manager screen you would like to place your user-defined field.
2. Right-click directly on any field name or tab name on your screen, and choose **Customize**.
3. Hold your left mouse button down on the name of the user-defined field (found in the **Available Items** pane) you would like to display on your screen.
4. Drag the field name into position anywhere on your screen, then release your mouse button.
5. Continue adding user-defined fields as desired, and then click **Close** on the Customize window.

Note: Click the **Save Current Window Settings** button



if you want the new layout to serve as the default.

Creating New Tabs

1. Right-click on any field (or tab heading) in Event Manager and choose **Customize**.
2. Hold your left mouse button on any field in the **Available Items** pane and drag it into position next to an existing tab.
3. Release your mouse button.
4. Continue adding tabs as desired, and then click **Close**.

Note: Click the **Undo** button if you want to try again.

Note: Click the **Save Current Window Settings** button



if you want the new layout to serve as the default.

Saving Custom Layouts

1. Add/remove fields and tabs as previously described.
2. Click the **Layout** button, located towards the top left of your Event Manager, and choose **Customize**.
3. Optionally click the **Shared** button if you want your new layout to be available to all users on your Caterease network.

4. Click the **Add Layout** button , located at the top left of the window.
5. Type the name of the new layout into the field provided, and

then click **Save Current Layout** .

Additional Resources

- [Customizing the Tools Menu and Tools Bar](#)
- [Customizing Your Screen Display](#)
- [Creating Custom Event Wizards](#)
- [Creating User-Defined Fields](#)
- [Editing Global Settings](#)



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Quick Reference Guide:

General Screen Customization

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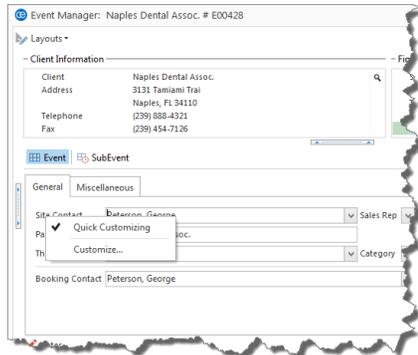


Enabling Quick Customizing

1. Ensure Quick Customizing is enabled by right-clicking on any field name or tab in Event Manager and verifying **Quick Customizing** is checked.

Note: Do not click within the fields or text boxes, but rather on areas of the screen that do not allow data entry.

The Quick Customizing feature is enabled in your **Global Settings > Miscellaneous tab > Auto Quick Layout Customize**.



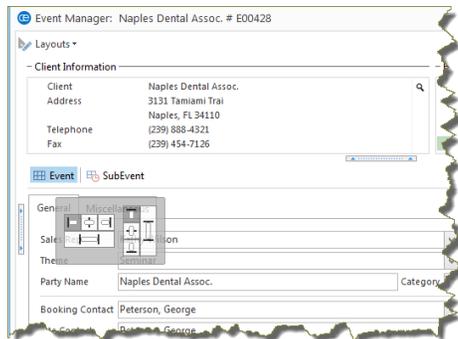
Rearranging Fields and Other Screen Elements

1. From Event Manager (or other Manager), click on the name of a field in your Event display or Sub-Event display and drag the field up, down, or across, as desired.

Note: Do not click within the fields or text boxes, but rather on areas of the screen that do not allow data entry.

2. Drop the field into the desired location on your screen.
3. Use the pop-up alignment tool to left-align, right-align, or center the fields as desired.

4. Click the **Save Current Window Settings** button  if you want the new layout to serve as the default.



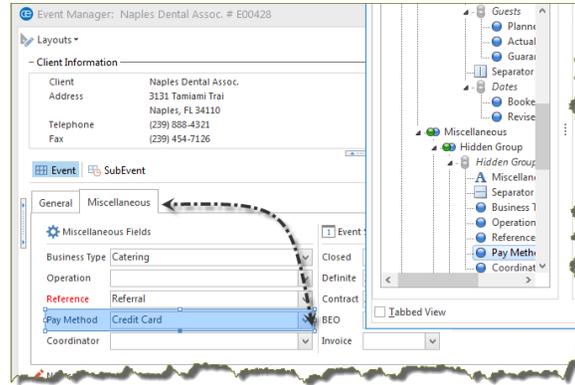
Moving Fields Across Tabs

1. Right-click on any field in Event Manager (that does not allow data entry) and choose **Customize**.
2. Click on a field and drag it into position it next to an existing tab.
3. Release your mouse button.

Note: Click the **Undo** button if you do want to try again.

4. When finished, click **Close** on the Customize screen.

5. Click the **Save Current Window Settings** button  if you want the new layout to serve as the default.



Removing General fields from the Screen

1. Right-click on any field or tab heading in Event Manager (that does not allow data entry) and choose **Customize**.
2. Click on the field or tab heading you would like to remove. For example, click on the word "Miscellaneous," i.e., **Miscellaneous** tab. The entire section will become highlighted, enabling you to drag it into the **Available Items** pane.
3. Drag the field or tab into the Available Items pane.
4. Continue removing fields or tabs as desired, and then click **Close** on the Customize screen.

Note: Click the **Save Current Window Settings** button  if you want the new layout to serve as the default.

Adding General Fields to the Screen

1. Right-click anywhere on the areas of the Event Manager screen that do not allow data entry, and choose **Customize**.
2. Hold your left mouse button on any field in the **Available Items** pane and drag it into the desired location on your screen.
3. Release your mouse button.

Note: Click the **Undo** button if you do want to try again.

4. Continue adding fields as desired, and then click **Close**.

Note: Click the **Save Current Window Settings** button  if you want the new layout to serve as the default.

Creating User-Defined Fields

1. Click the **Setup** sidebar and choose **User Defined Fields**.
2. Click on the appropriate tab (Events or Sub-Events, for example) for the type of field you are creating.
3. Click into the first available user-defined field and type as desired.

4. Click the down arrow to the right of the **Type** field and select a format type for this field. Choose from among Text; Phone; Number; Currency; Date; and Time.

Note: Your selected **Type** will dictate the user-defined field's format.

5. Click **OK** when finished adding user-defined fields.

