



# Elecāte™

INTELLIGENT **CATERING+EVENT+RENTAL** SOFTWARE

## User Manual

v 1.3 :: 1.10.2025





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# Welcome.

## **Captivate customers. Accelerate productivity & profits.**

**Elevate your business with the intelligent, all-in-one management software trusted by industry icons—created by industry experts**

To thrive, you account for every detail—we know. Elecate employs brilliantly efficient software with over 30 years of results for the complex needs of hospitality and rental businesses. Capture and track deals with our native CRM. Win more events with stunning proposals. Run comprehensive reports confirming your ROI. Accelerate your team's growth with extensive support and training.

From ingredients to inventory, dispatching to staffing, production to profit, Elecate is your guiding star.

**This guide is designed to help you utilize every feature to help you save more time and manage business flawlessly. If you have any questions, please reach out to our support team at [support@elecate.com](mailto:support@elecate.com) or create a ticket here: <https://elecate.com/submit-a-ticket>**





## Accessing Elecate

Elecate cares about you, and your customer's safety. With that in mind, we enforce a process of accessing your profile and content, that guarantees only authorized individuals can access sensitive information and perform actions in the system.

### Logging in with Email and Password

To log in using your email address and the password provided by your system administrator:

1. Enter your credentials; click on Sign In

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The screenshot shows the Elecate login interface. At the top is the Elecate logo with the tagline "Sign in to your account". Below the logo are two input fields: "Email" containing "@eliorconstellationfl.com" and "Password" with masked characters. A "Forgot Password?" link is positioned to the right of the password field. At the bottom, a blue "Sign In" button is highlighted with a red rectangular border.

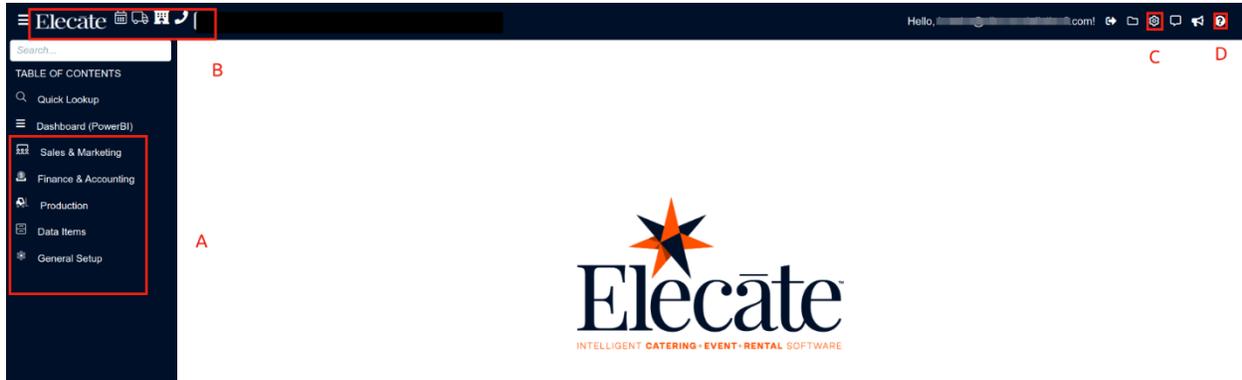
### Single Sign On

To simplify the process of accessing the website, you can now sign in using your Google or Microsoft account.

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This screenshot shows the same Elecate login interface as above, but with an additional section. Below the "Sign in" button is the text "Or sign in with" followed by two buttons: "Microsoft" and "Google". The "Google" button is highlighted with a red rectangular border.

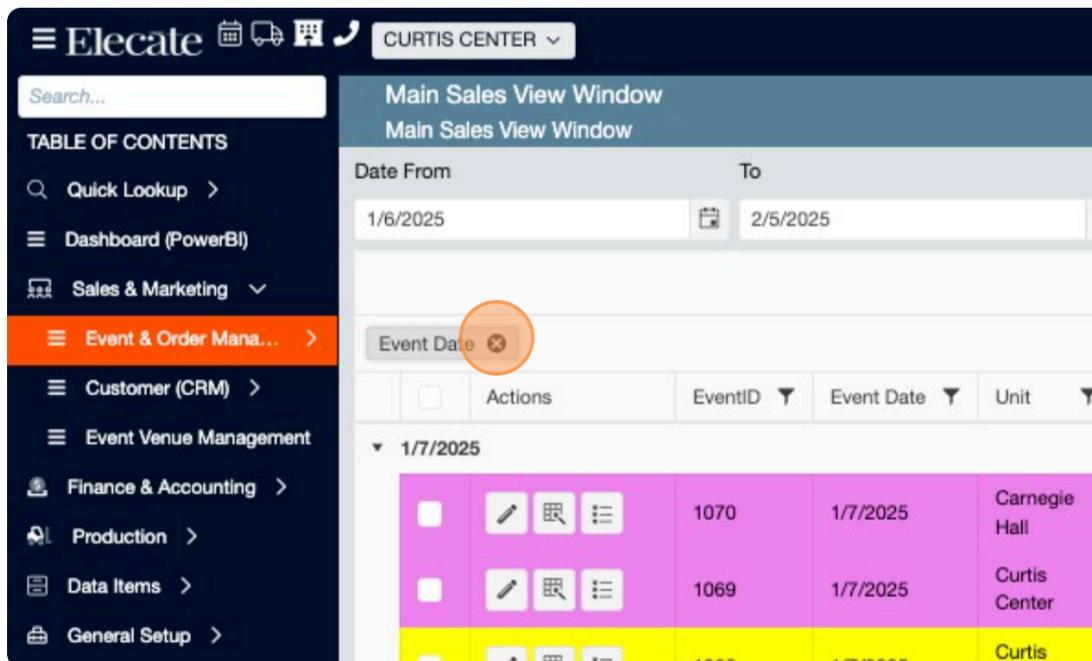
## Home Page Quick Tour



- Main Panel:** Most features are listed and arranged inside these options.
- Calendar:** The built-in calendar is a great way to visualize upcoming events.
- App Setting Information:** System settings can be adjusted here, by an administrator.
- Help Center:** In the Help Center, users can reference our FAQs.

## Grid Persistence

On many of the Elecate screens, users can dynamically control the way that information is displayed. By dragging the column headers up, as shown below, the information can be filtered and sorted in different ways.



To return the view to the original settings, simply hit the *Reset State* button.

ect Reports... Print To New Entry

Reset State Search...

	Salesperson	Event Type	Guest	Menu	Beverage
ER -	Not Available	WEB ORDER	6	In-Process x	New x
VE	CD	Internal - Stations	1	In-Process x	New x
ER -	Not Available	WEB ORDER	6	In-Process x	New x
ER - ED	BG	WEB ORDER	100	New x	New x
VE	Not Available	Internal - Promo Event	1	In-Process x	New x

# Sales & Marketing



# Elecate

## Customer CRM

### Creating a New Customer

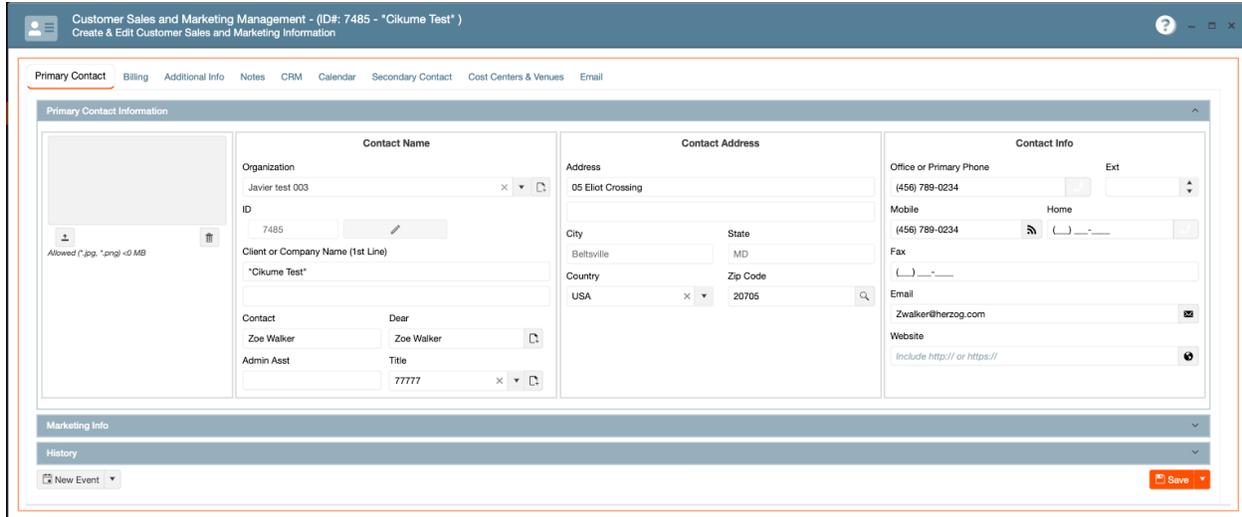
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on the *Customer (CRM)*
3. Click on *Customer Marketing*
4. Select *Create New Customer*
5. On the *Create New Customer Marketing* information screen, enter the following information:
  1. Organization (where applicable)
  2. Client or Company Name\*, Contact\*, Title (Event Management, Director Sales, etc.)
  3. Contact Address, City, State, Country, and Zip Code\*
  4. Contact Info Office or Primary Phone, Mobile, Home, Email\*
  5. Referred by\*
5. Once you enter all the information click on “Save”.

\* Denotes required fields

The screenshot shows the 'Create New Customer Marketing Information' form in the Elecate Customer CRM. The form is titled 'Primary Contact Information' and is divided into several sections: 'Contact Name', 'Contact Address', and 'Contact Info'. The 'Contact Name' section includes fields for Organization, ID, Client or Company Name (1st Line), Overflow name (30-characters maximum), Contact, Dear, Admin Asst, and Title. The 'Contact Address' section includes fields for Address, City, State, Country, and Zip Code. The 'Contact Info' section includes fields for Office or Primary Phone, Ext, Mobile, Home, Fax, Email, and Website. The form also includes a 'Marketing Info' section and a 'History' section. A 'Save' button is located at the bottom right of the form.

## Edit Customer Information

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer CRM*, and then *Customer Marketing*. The *Customer Marketing Window* will appear
3. From the menu, click on *Customer Sales and Marketing Management*
4. Click on the pencil icon or double click any row to open a client's information
5. From this window you can edit the customer's information
6. Once you have made all the changes, click on *Save*.



The screenshot displays the 'Customer Sales and Marketing Management' interface. The main window is titled 'Primary Contact Information' and contains several sections for editing customer data:

- Contact Name:** Organization (Javier test 003), ID (7485), Client or Company Name (1st Line) (\*Cikume Test\*), Contact (Zoe Walker), Dear (Zoe Walker), Admin Asst, and Title (77777).
- Contact Address:** Address (05 Eliot Crossing), City (Beltsville), State (MD), Country (USA), and Zip Code (20705).
- Contact Info:** Office or Primary Phone (456) 789-0234, Ext, Mobile (456) 789-0234, Home, Fax, Email (Zwalker@herzog.com), and Website (Include http:// or https://).

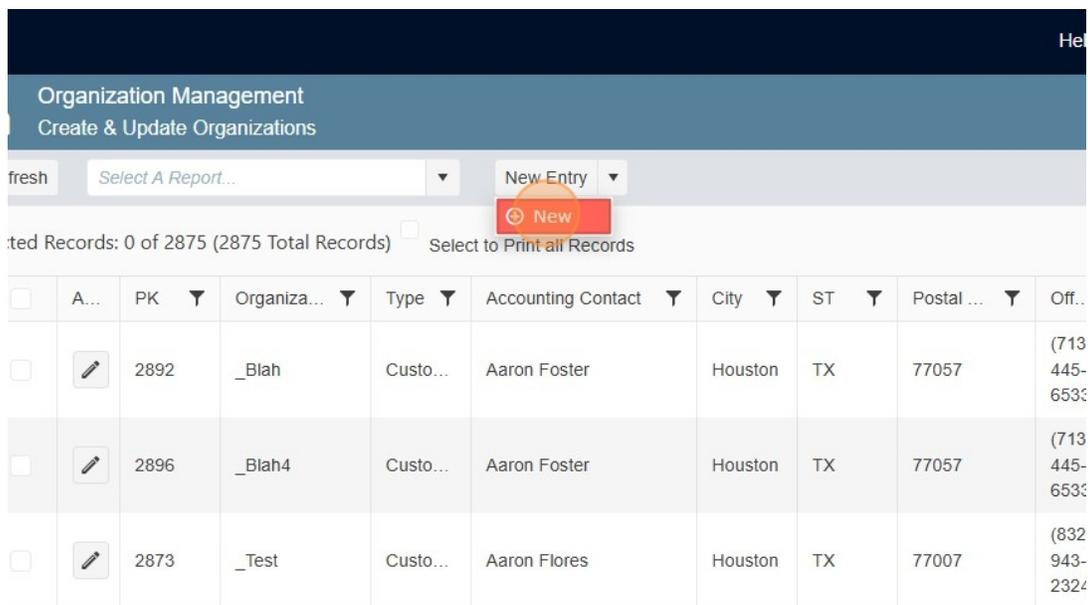
At the bottom of the form, there are sections for 'Marketing Info' and 'History', and a 'New Event' dropdown menu. A 'Save' button is located in the bottom right corner.

## Create a New Organization/Adjust Organization Contacts

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer CRM*, and then *Organization Management*. The *Organization Management Window* will appear
3. From the menu, click on *Organization Management*
4. To create a new organization, click on *New Entry > New*

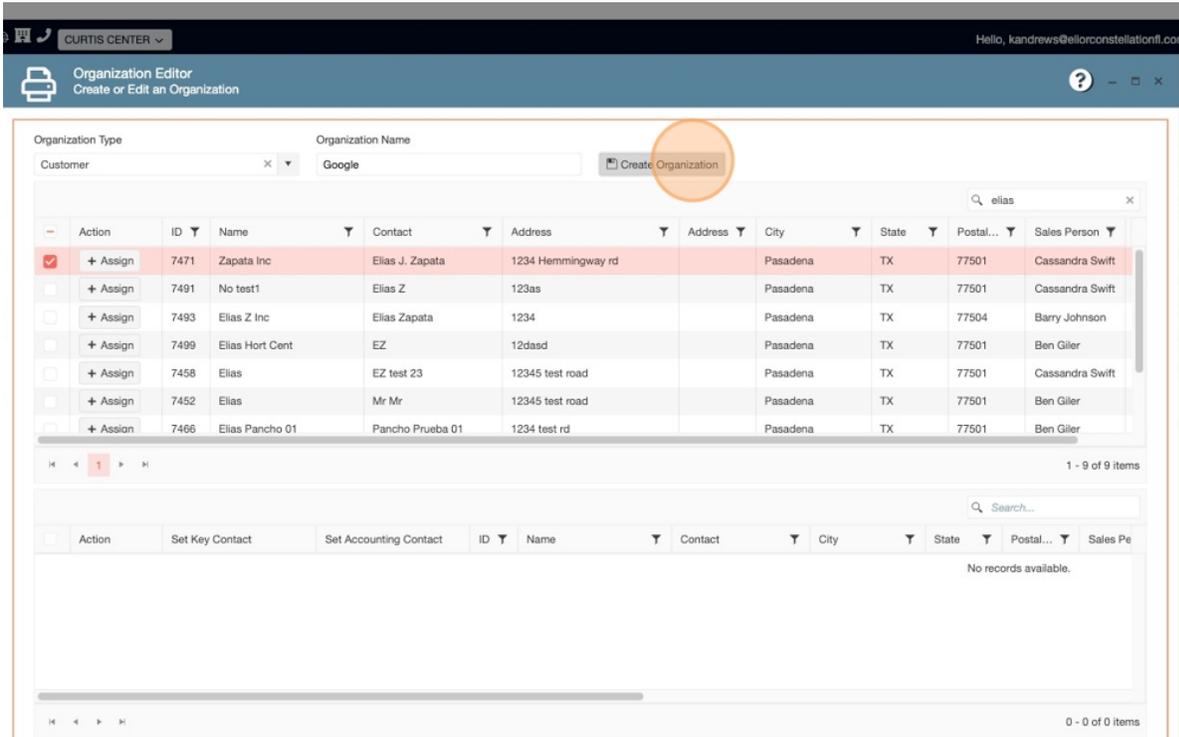
*Note: Before creating a new organization, users must create the customer or prospect for which they want to assign to an organization.*

- a. Select the Organization Type (Customer or Prospect)
  - i. Contacts matching that selection will appear below
- b. Enter the Organization Name
- c. Select the corresponding contact(s) to be associated with the organization

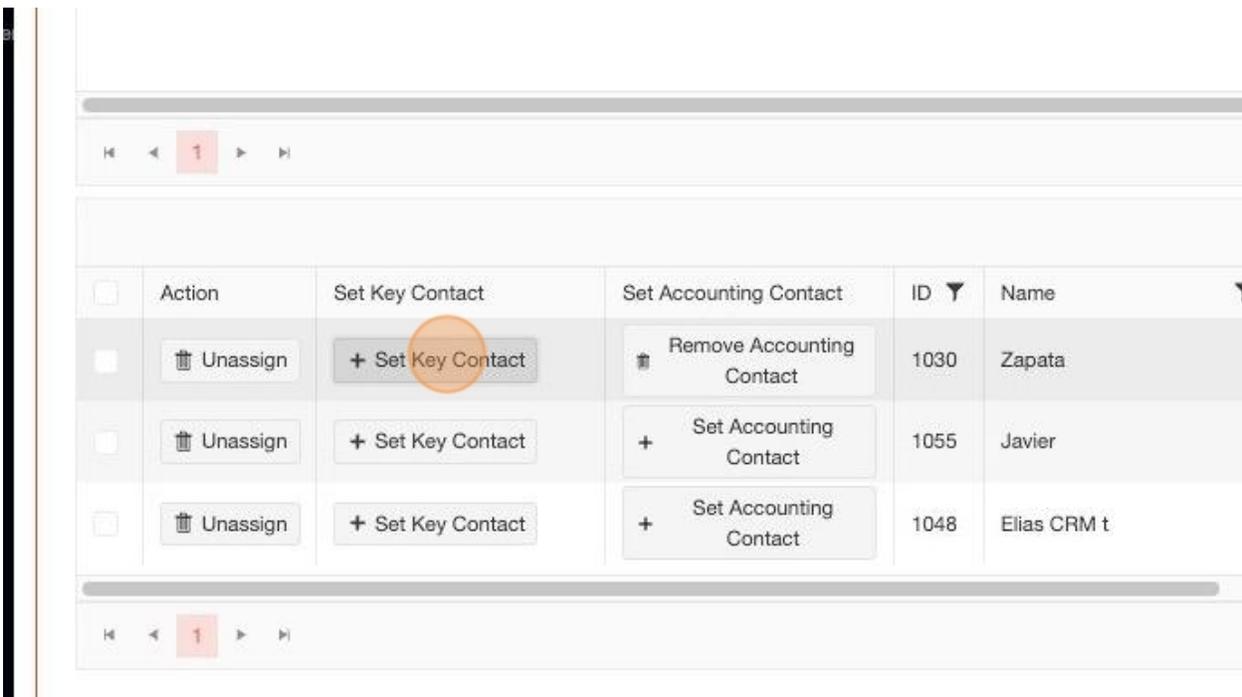


The screenshot shows the 'Organization Management' window with the sub-header 'Create & Update Organizations'. It features a search bar with 'fresh' and 'Select A Report...' options, a 'New Entry' dropdown menu, and a red 'New' button. Below the search bar, it displays 'Filtered Records: 0 of 2875 (2875 Total Records)' and a 'Select to Print all Records' checkbox. The main area contains a table with the following columns: A..., PK, Organiza..., Type, Accounting Contact, City, ST, Postal ..., and Off... The table lists three records:

A...	PK	Organiza...	Type	Accounting Contact	City	ST	Postal ...	Off...
<input type="checkbox"/>	 2892	_Blah	Custo...	Aaron Foster	Houston	TX	77057	(713-445-6533)
<input type="checkbox"/>	 2896	_Blah4	Custo...	Aaron Foster	Houston	TX	77057	(713-445-6533)
<input type="checkbox"/>	 2873	_Test	Custo...	Aaron Flores	Houston	TX	77007	(832-943-2324)



5. To *edit* an existing organization's contacts
  - a. Click on the pencil icon or double-click the row
  - b. Locate the customer you would like to add to an organization by searching
  - c. To unassign or change the key contact or accounting contact information, use the buttons on the bottom grid

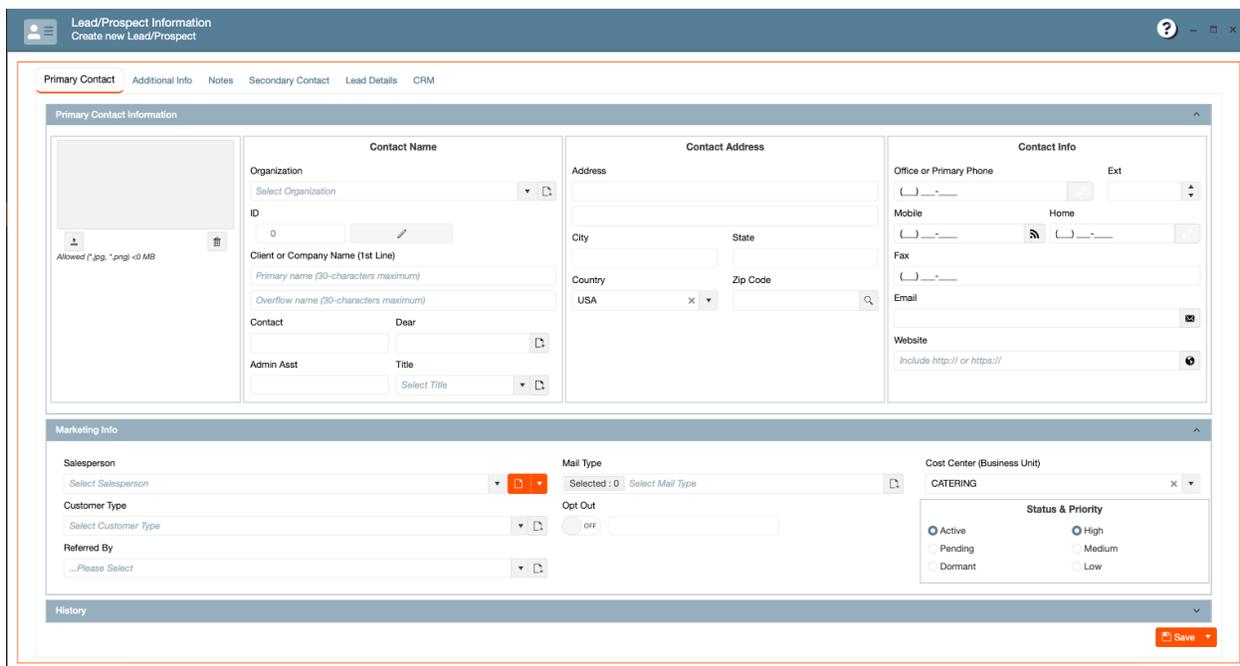


## Create a New Prospect

Leads and Prospects are potential customers who have expressed interest or demonstrated potential in purchasing catering and event services but have not yet made a commitment. To create a new lead or prospects, follow these steps:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer CRM* and then click on *Lead/Prospect*. The *Customer Lead/Prospect* window will appear
3. From the menu, click on *Lead/Create New Prospect*
4. Enter the following information:
  - Select an Organization if applicable
  - Client or company name\*
  - Address, City, State, Zip Code, Country\*
  - Phone number\*
  - Email\*
4. Click on *Save*

\* Denotes required fields



The screenshot shows a web application window titled "Lead/Prospect Information" with the subtitle "Create new Lead/Prospect". The window has a dark blue header with a help icon and window controls. Below the header is a navigation bar with tabs: "Primary Contact" (selected), "Additional Info", "Notes", "Secondary Contact", "Lead Details", and "CRM". The main content area is divided into several sections:

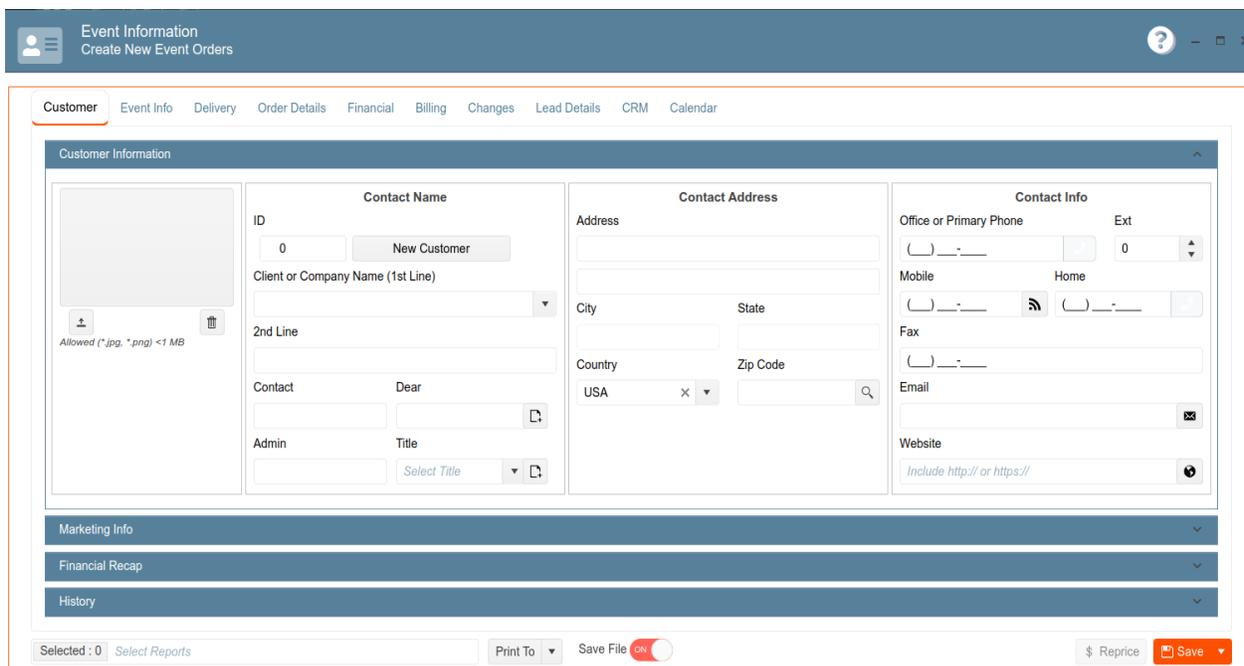
- Primary Contact Information:** Includes a profile picture placeholder (allowed formats: .jpg, .png, <1 MB) and a "Contact Name" section with fields for Organization (dropdown), ID, Client or Company Name (Primary name and Overflow name), Contact, Admin Asst, and Title (dropdown).
- Contact Address:** Includes fields for Address, City, State, Country (dropdown, currently USA), and Zip Code.
- Contact Info:** Includes fields for Office or Primary Phone, Ext, Mobile, Home, Fax, Email, and Website (with a note to include http:// or https://).
- Marketing Info:** Includes fields for Salesperson, Mail Type (Selected: 0), Cost Center (Business Unit) (CATERING), Customer Type, Referred By, Opt Out (OFF), and Status & Priority (Active, Pending, Dormant, High, Medium, Low).
- History:** A section at the bottom with a "Save" button.

# Creating Events and Event Orders

## Creating a New Event

The event information screen houses the key details of each event, including the event date, time, location, guest count, order details, special requests, and any other necessary details for planning and executing the event.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Click on *Create New Events Orders*
  - Users can then select an existing customer, or enter a new customer
4. Complete all the required information
5. Once you have entered the required information click on Save



The screenshot shows the 'Event Information' window with the 'Create New Event Orders' form. The form is organized into several sections:

- Customer Information:** Includes a profile picture placeholder (allowed \*.jpg, \*.png <1 MB) and a 'New Customer' button.
- Contact Name:** Fields for ID (0), Client or Company Name (1st Line), 2nd Line, Contact, Dear, Admin, and Title (with a 'Select Title' dropdown).
- Contact Address:** Fields for Address, City, State, Country (USA), and Zip Code.
- Contact Info:** Fields for Office or Primary Phone, Ext (0), Mobile, Home, Fax, Email, and Website (with a note to include http:// or https://).

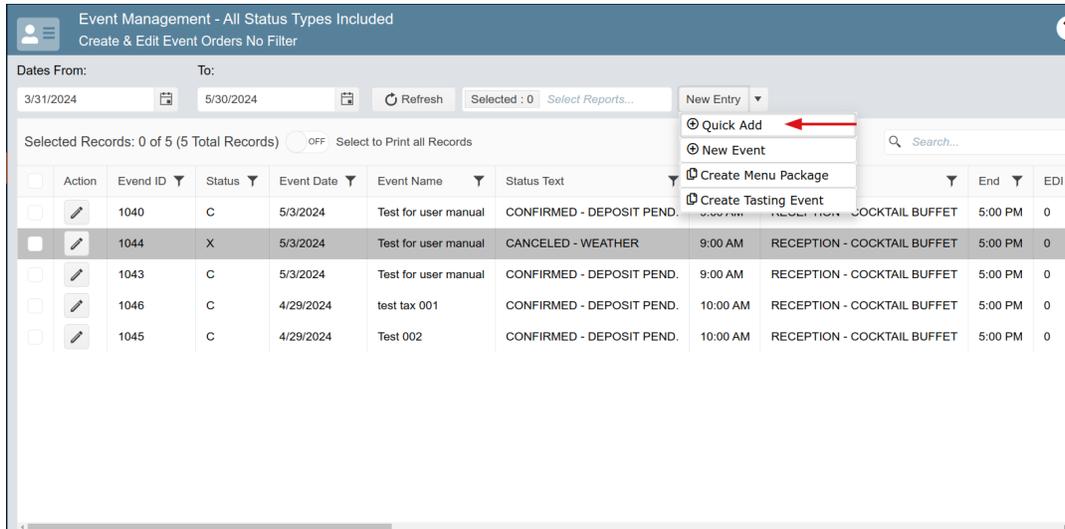
The form is part of a larger application window with a top navigation bar and a bottom toolbar. The toolbar includes 'Selected: 0', 'Select Reports', 'Print To', 'Save File' (with a 'CN' button), '\$ Reprice', and 'Save'.

**TIP:** You can also create an event directly from the customer's file, click on the *New Event* button and the *Event Information* window will appear.

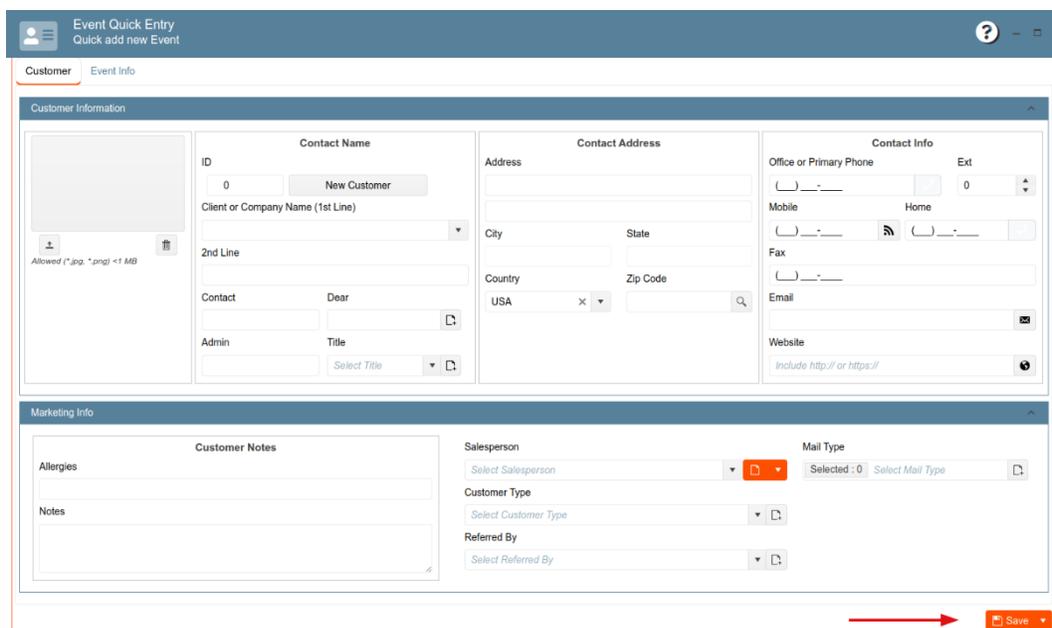
## Adding a Quick Event

To quickly capture the basic details of a new event, users can use the Quick Event feature.

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*.
3. Click on *Event Management-All Status Types Included or Main Sales View*
4. Click on the down arrow next to the *New Entry* button
5. From the drop-down menu, select *Quick Add*



6. A pop-up window will appear
7. Once you have entered all the information, click *Save*



## Copying an Event

You can also create an event from an existing one.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included* or *Main Sales View Window*
4. Select the event by checking the box next to the pencil icon
5. Click on the down arrow next to the *New Entry* button
6. From the drop-down menu, select *copy event*
7. The *Copy Event Process Window* will pop up
8. Update the billing information
9. Click on *Process Copy*.

📄 Copy Event Process Window  
Copy Past Event Information ? x

Customer Billing Information		Filter Departments to Copy
<b>Existing Customer</b> <input type="text" value="Krissia Castro test 5"/>	<b>New Event Name</b> <input type="text" value="Test for user manual"/>	<input type="checkbox"/> Menu <input type="checkbox"/> Beverage <input type="checkbox"/> Equipment <input type="checkbox"/> Staff <input type="checkbox"/> Miscellaneous
<b>Existing Contact</b> <input type="text" value="Krissia Castro"/>	<b>New Customer</b> <input type="text" value="Krissia Castro test 5"/> x ▾	
<b>Existing Status</b> <input type="text" value="Confirmed - Deposit Pend."/>	<b>New Status</b> <input type="text" value="Confirmed - Deposit Pend."/> ▾	
<b>Existing Date</b> <input type="text" value="Friday, May 3, 2024"/>	<b>New Event Date</b> <input type="text" value="5/3/2024"/> 📅 <input type="button" value="Recurrence"/>	
<input type="button" value="Process Copy"/> ▾		

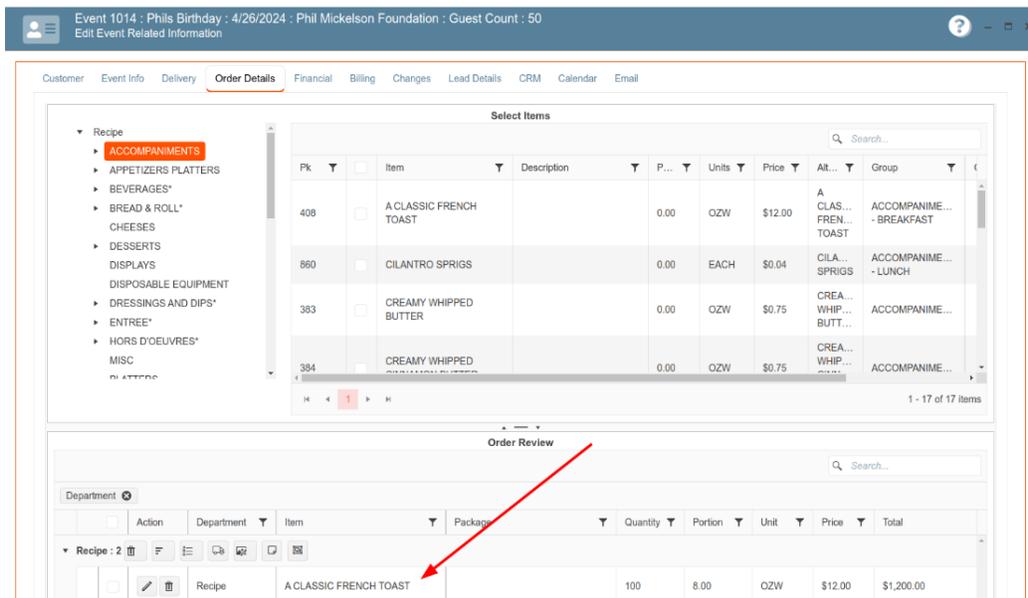
## Managing Event Orders

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Main Sales View Window*
4. Choose an event or click the pencil icon to view/edit a variety of details

## Adding items from the *Recipe Department* via *Order Details*

From the event window you can add items in different categories, which are called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included or Main Sales View*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Recipe* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*.



The screenshot shows the Elecate software interface. At the top, there's a header bar with event information: "Event 1014 : Philis Birthday : 4/26/2024 : Phil Mickelson Foundation : Guest Count : 50". Below this is a navigation menu with tabs: Customer, Event Info, Delivery, **Order Details**, Financial, Billing, Changes, Lead Details, CRM, Calendar, Email. The main content area is divided into two sections. The top section is titled "Select Items" and contains a table with columns: Pk, Item, Description, P..., Units, Price, Alt..., Group. The table lists several items, including "A CLASSIC FRENCH TOAST" (Pk 408, Price \$12.00), "CILANTRO SPRIGS" (Pk 860, Price \$0.04), "CREAMY WHIPPED BUTTER" (Pk 383, Price \$0.75), and "CREAMY WHIPPED BUTTER" (Pk 384, Price \$0.75). The bottom section is titled "Order Review" and contains a table with columns: Department, Action, Department, Item, Package, Quantity, Portion, Unit, Price, Total. A red arrow points to the "A CLASSIC FRENCH TOAST" item in this table, which has a quantity of 100, a portion of 8.00, a unit of OZW, a price of \$12.00, and a total of \$1,200.00.

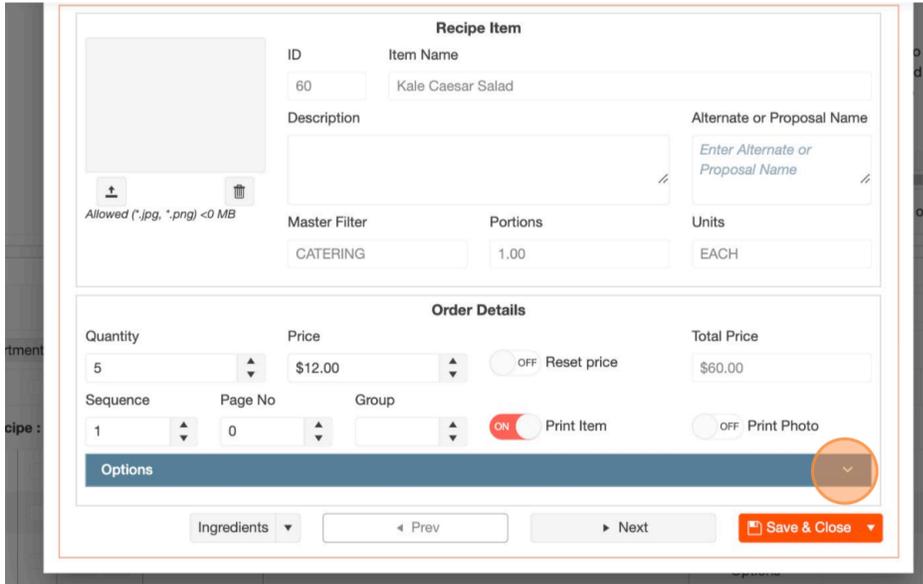
**Important:** To save items, the event entry must have been completed and saved first.

## Indicating Production Location

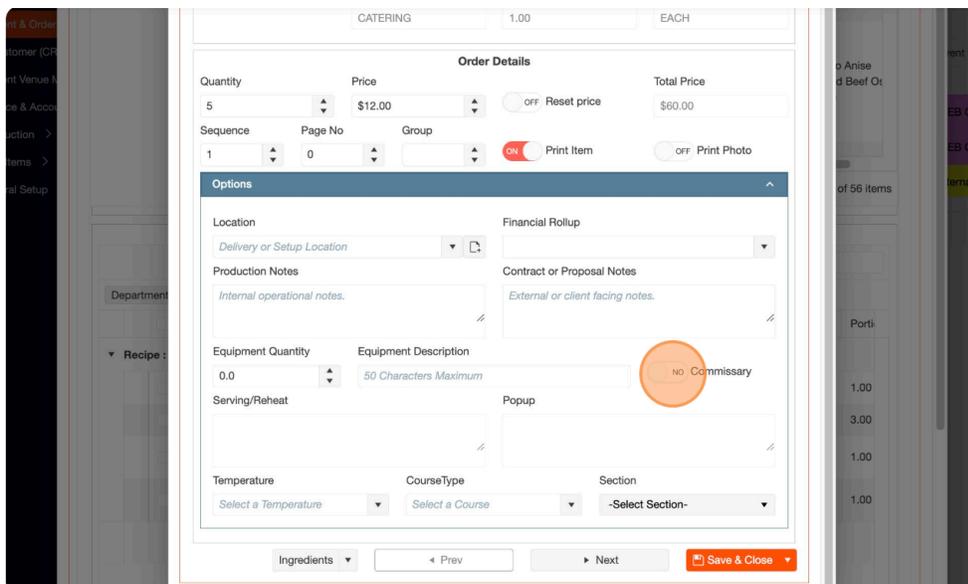
If an operation produces recipes out of both the commissary and the on-premise location, the Commissary toggle can be used to indicate who should produce a given item. When adding a recipe to an event order, follow the below steps to indicate the production location:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included or Main Sales View*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab

6. Select the *Recipe* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details, then click the Options section to input additional information



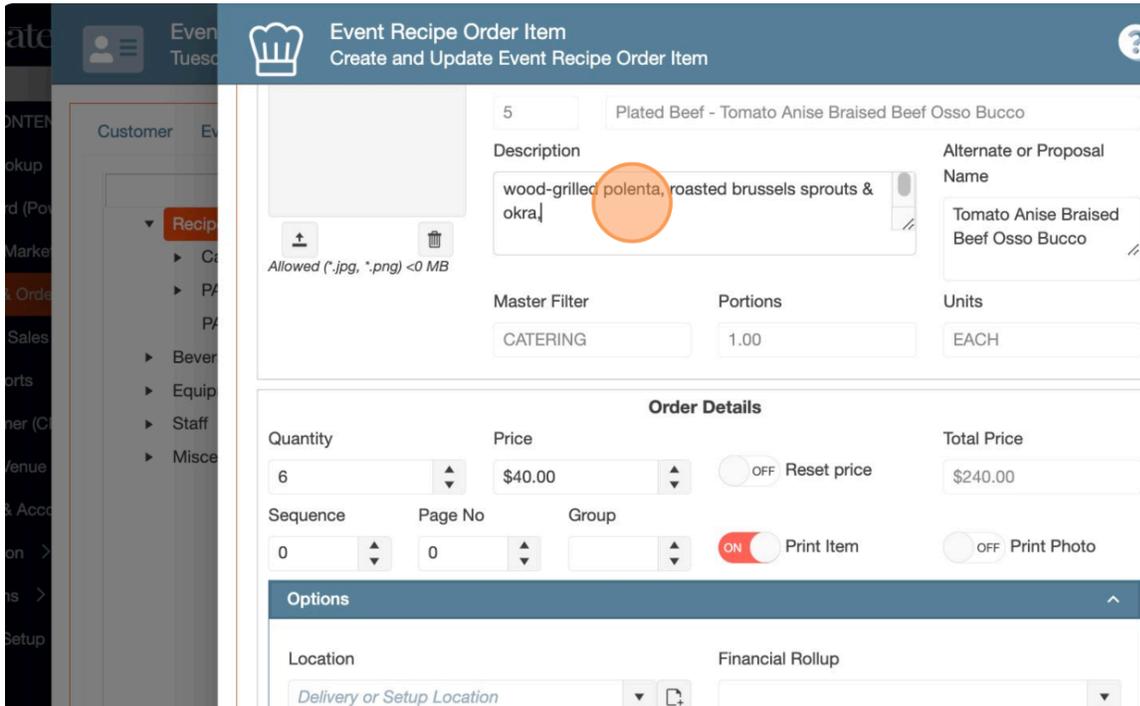
9. Locate the *Commissary* toggle and switch it to No or Yes, according to your desired production location
10. Click on save and close
11. The new items will appear under *Order Review*.



## Making Changes to Menu Items

When a user enters a recipe, and edits the alternate name or proposal description fields, they must enter production notes so that the kitchen knows what change has occurred.

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*.
3. Click on *Event Management-All Status Types Included* or *Main Sales View*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Click on the tab *Order Details*
6. Select the *Recipe* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Make the desired edits to the Description and/or Alternate or Proposal Name



**Event Recipe Order Item**  
Create and Update Event Recipe Order Item

5 Plated Beef - Tomato Anise Braised Beef Osso Bucco

Description: wood-grilled polenta, roasted brussels sprouts & okra

Alternate or Proposal Name: Tomato Anise Braised Beef Osso Bucco

Master Filter: CATERING Portions: 1.00 Units: EACH

**Order Details**

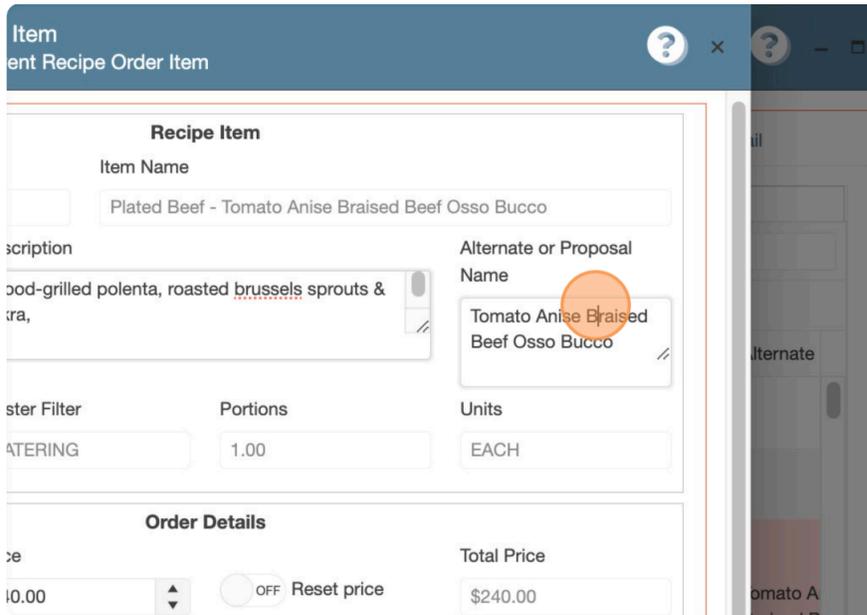
Quantity: 6 Price: \$40.00 Total Price: \$240.00

Sequence: 0 Page No: 0 Group: [ ]

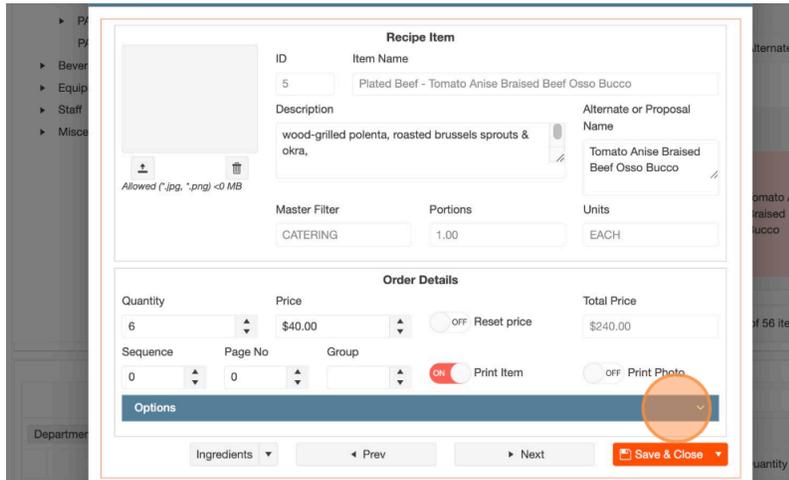
Print Item: ON Print Photo: OFF

**Options**

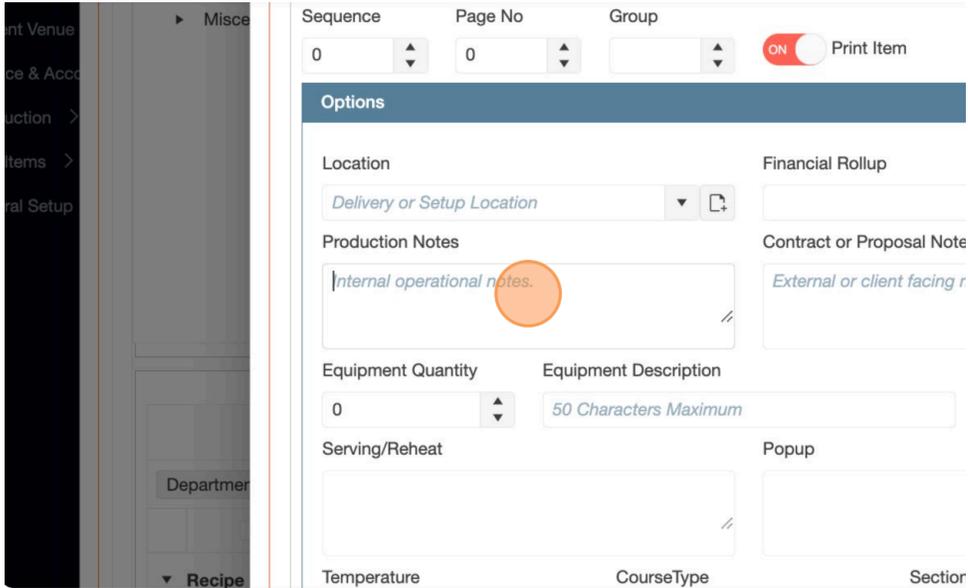
Location: Delivery or Setup Location Financial Rollup: [ ]



9. Then click *Options*



10. Click into the *Production Notes* field and write what has changed from the standard data item, for internal purposes. **Note:** this is required if the above fields have been edited



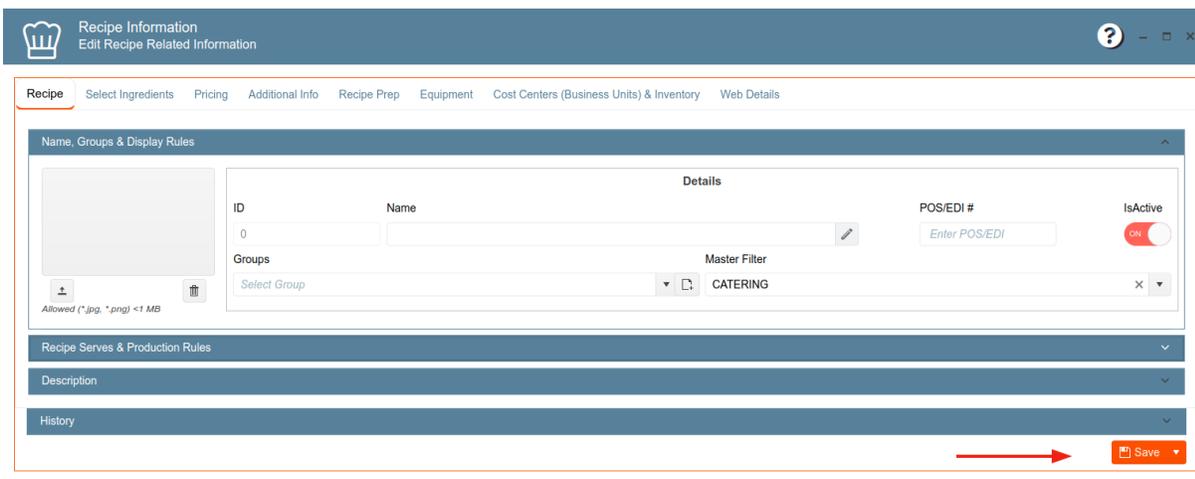
11. Click *Save & Close*

## On the Fly Recipes

To quickly add a recipe that isn't in your database, you can use the on-the-fly recipe tool.

**Note-** this feature will be turned off for Elixir

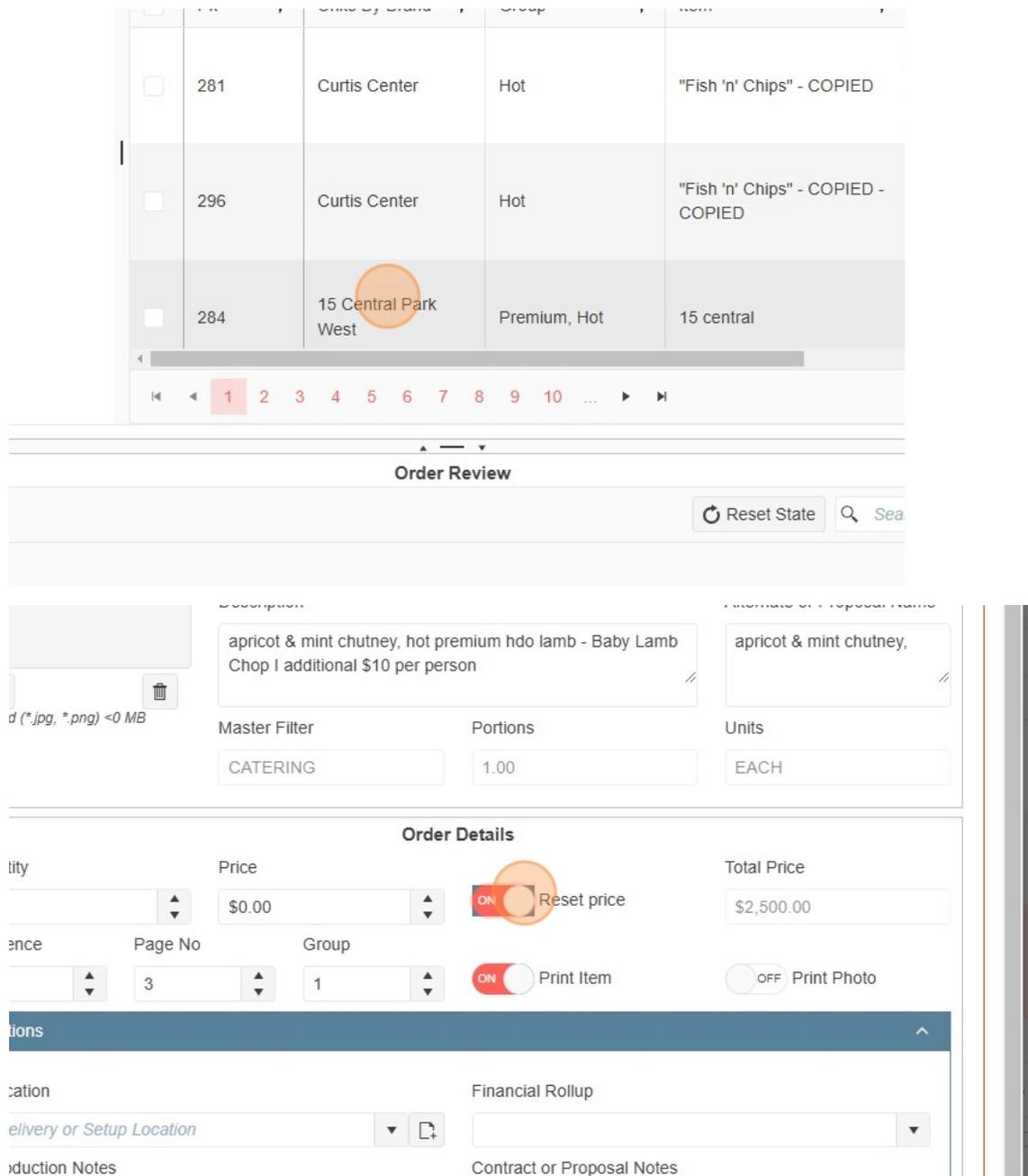
1. Click on Data Items section located on the left panel
2. Select *Food Management* and the *Food Department* window will appear
3. Select *Recipe Management (On the fly)*
4. Click on the *New Entry* button, and the *Recipe Information* window displays
5. Complete the fields and click save



## Price Toggles

The Reset Price toggles allow users to reset the selling price of a recipe back to the original price. For example, if a user changes the selling price of an item, or makes it \$0, but then needs to change it back to the original, they do not have to remember the selling price, instead they can toggle the switch to reinstate the original price.

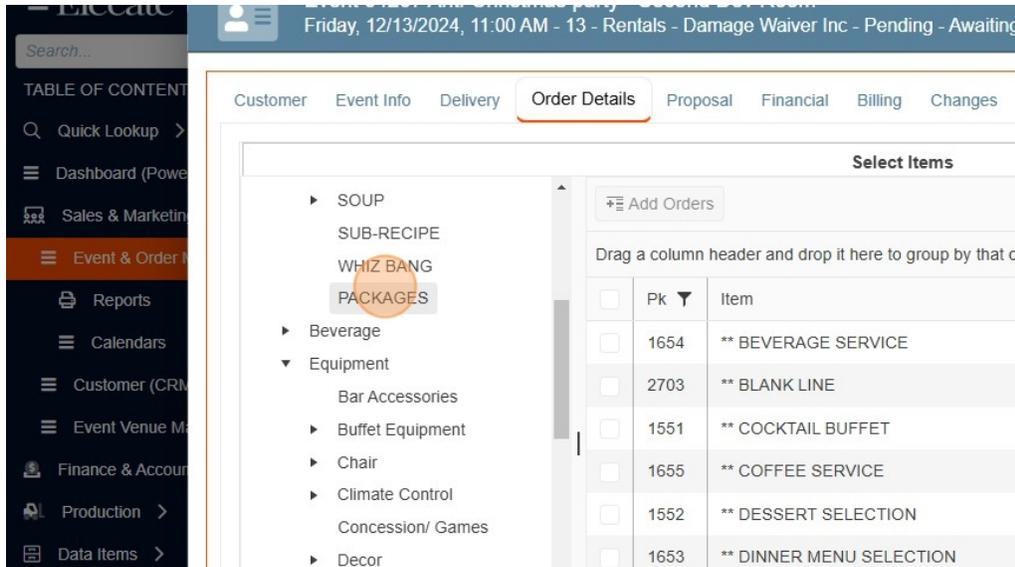
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Choose an item to update



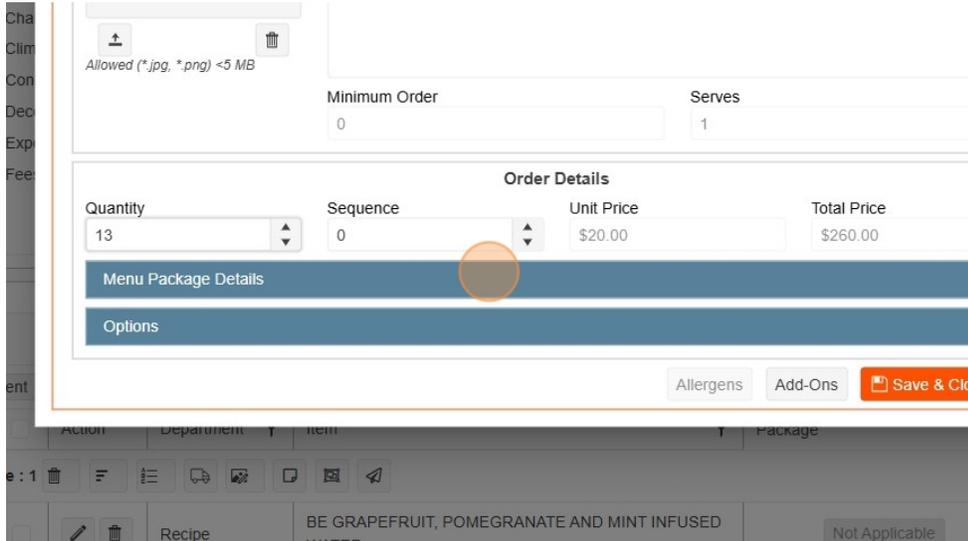
The screenshot displays the Elecate interface. At the top, a table lists items with columns for ID, Name, Location, and Status. Item 284, '15 Central Park West', is highlighted, and a red circle highlights a pencil icon in the 'Group' column. Below the table is a pagination bar with page numbers 1 through 10, where '1' is selected. The 'Order Review' section includes a 'Reset State' button and a search field. The 'Order Details' section shows a description: 'apricot & mint chutney, hot premium hdo lamb - Baby Lamb Chop I additional \$10 per person'. It includes fields for 'Master Filter' (CATERING), 'Portions' (1.00), and 'Units' (EACH). A 'Reset price' toggle is shown in the 'ON' position, with a red circle highlighting it. Other toggles for 'Print Item' (ON) and 'Print Photo' (OFF) are also visible. The 'Total Price' is displayed as \$2,500.00. At the bottom, there are dropdown menus for 'Delivery or Setup Location' and 'Financial Rollup', and text areas for 'Production Notes' and 'Contract or Proposal Notes'.

## Adding a Menu Package

1. Click on the *Sales & Marketing* section located on the left panel
2. Click on *Event & Order Management*
3. Click on *Event Management-All Status Types Included* or *Main Sales View Window*
4. Select the event you want to edit by clicking on the pencil button or double-clicking on the event row
5. Navigate to the *Order Details* tab
6. In the left panel click to expand the dropdown options in the *Recipe* category
7. Click on the *Packages* item

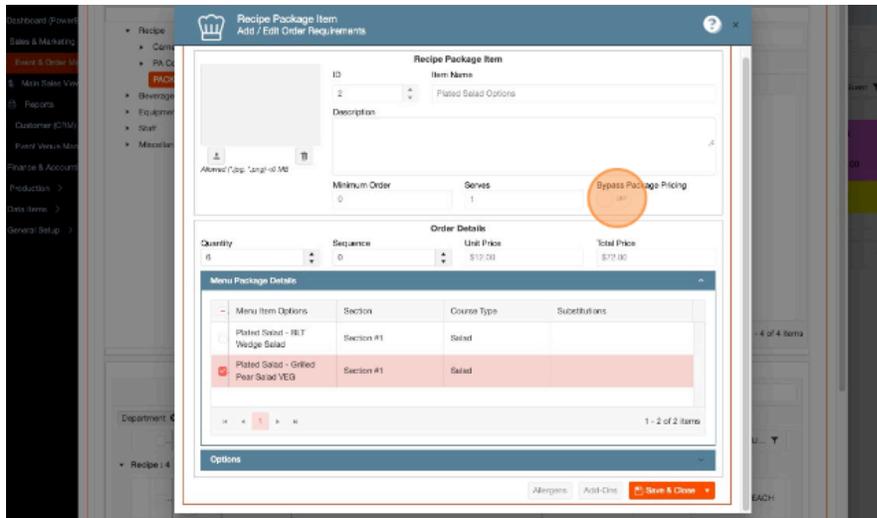


8. In the *Select Items* pane, double click on an item
9. Users enter the quantity and sequence of a package on this page
10. To view the details of the package, expand the section called *Menu Package Details*
  - a. From here users can add individual items or the entire package by making checking and unchecking items in the menu package



11. Users can also make
12. Click on *Save & Close*

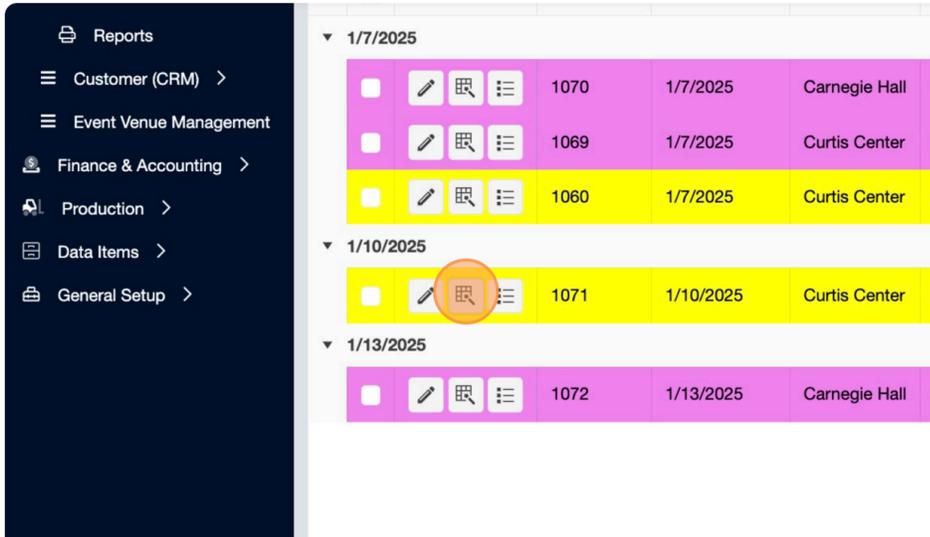
**Tip:** The *Bypass Package Pricing* toggle allows users to see how a package was set up. If the toggle is OFF, the items are priced as a set, offering a “package price”. If the toggle is ON, each component of a package is priced individually.



## Building a Menu Using the Menu Builder

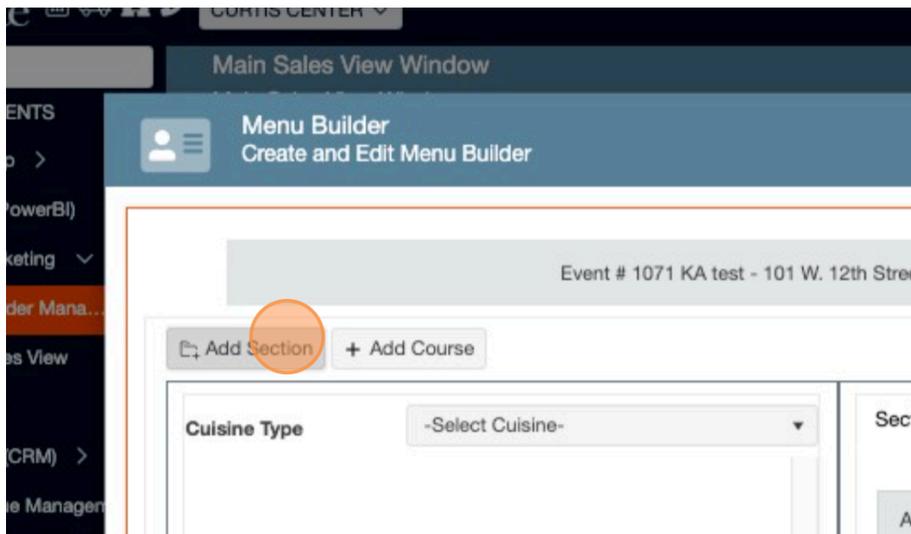
The Menu Builder window allows users to quickly add recipes and beverages and visualize how they will appear on a proposal.

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*.
3. Click on *Main Sales View*
4. Select the *grid icon* next to the pencil on the event you'd like to work on



Date	Section ID	Venue
1/7/2025	1070	Carnegie Hall
	1069	Curtis Center
	1060	Curtis Center
1/10/2025	1071	Curtis Center
1/13/2025	1072	Carnegie Hall

5. Start by adding Sections. Sections create divisions in the proposal, creating a page break to denote a transition. To add a *Section*, click the *Add Section* button.



Main Sales View Window

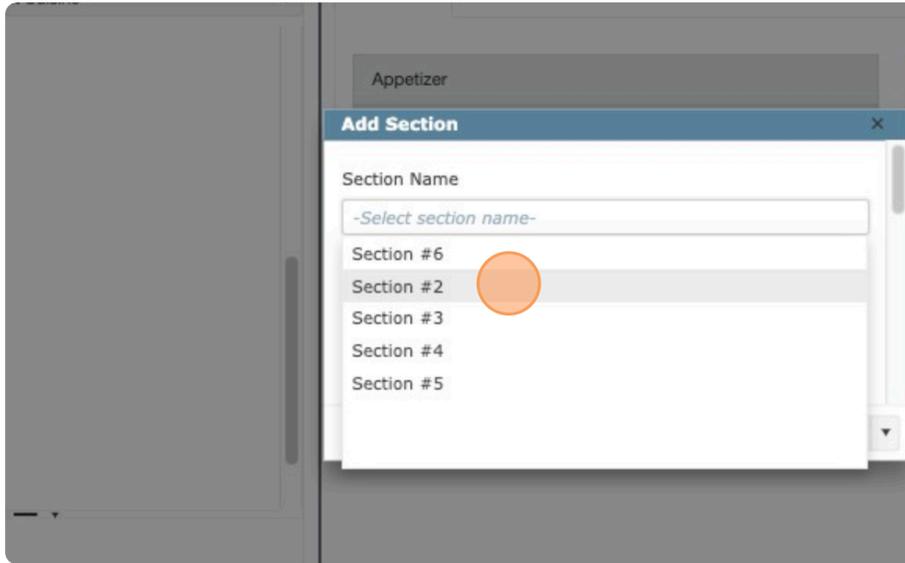
Menu Builder  
Create and Edit Menu Builder

Event # 1071 KA test - 101 W. 12th Street

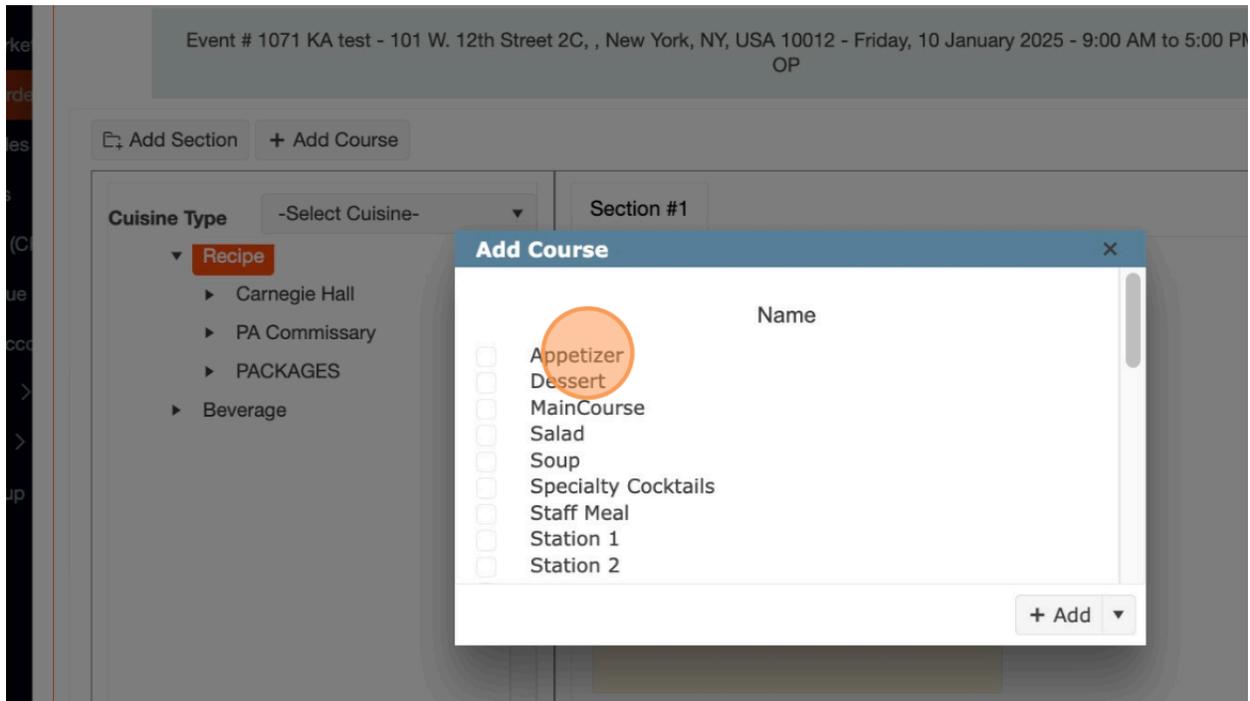
+ Add Section + Add Course

Cuisine Type: -Select Cuisine-

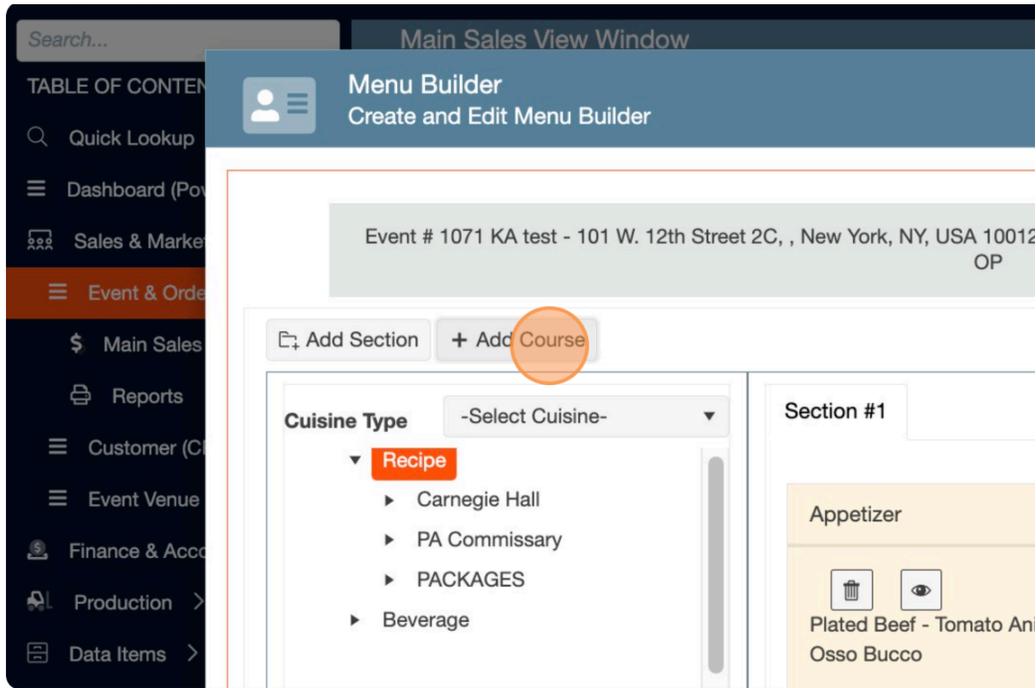
6. Click the Section Name field and add the desired Section Number.



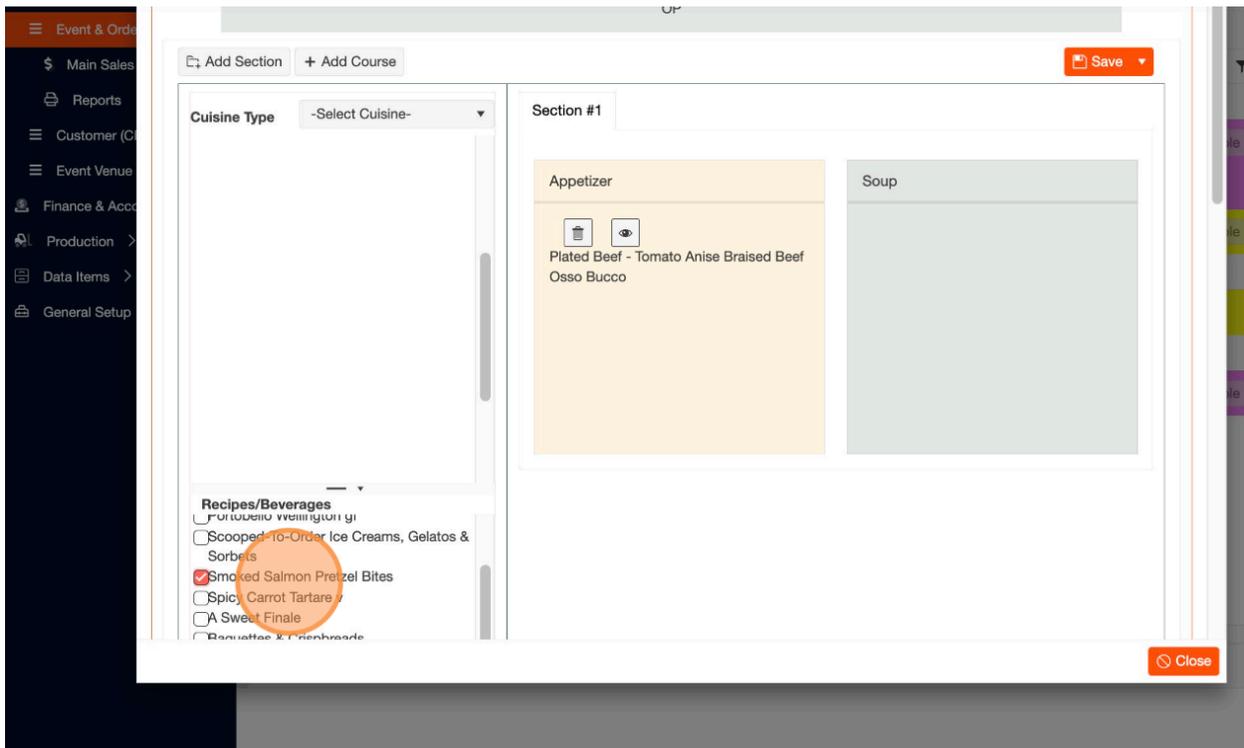
7. Then add the *Courses* to fall within the new *Section*, by checking as many of the default options as desired. *Courses* provide a grouping mechanism for recipes. Some examples include First Course, Main Course and Dessert.

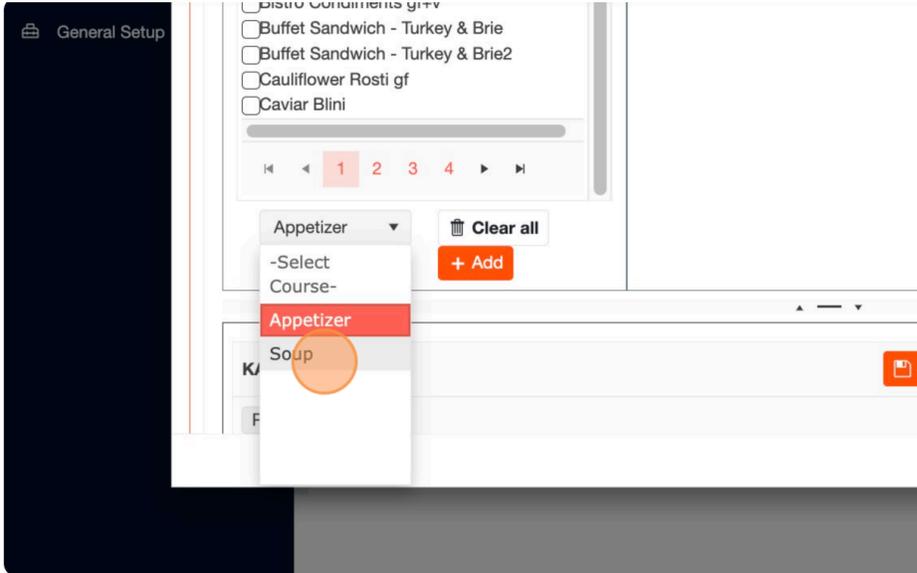


8. To add additional *Courses* or *Sections*, the buttons in the left corner of the Menu Builder window can be used.

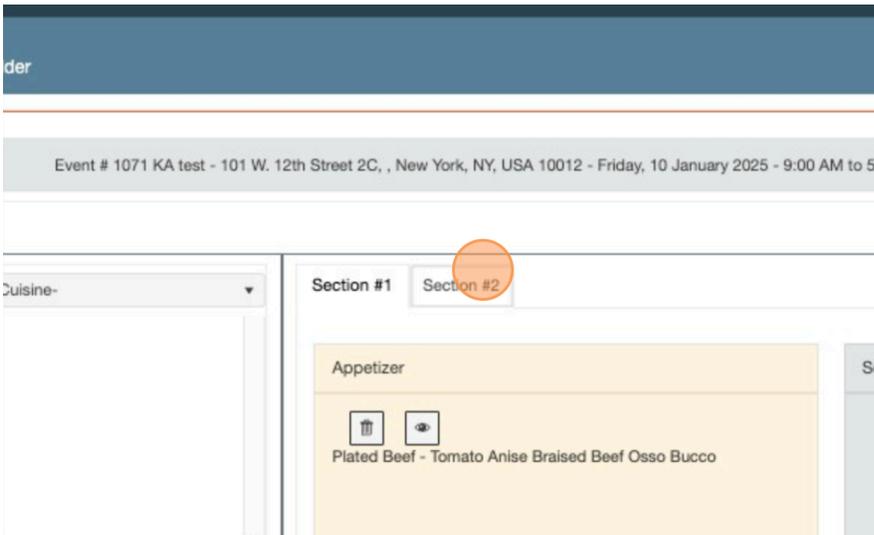


- Finally, add *recipes* to the *courses*. Use the group tree on the left-hand side to locate the items you'd like to add to the proposal. Select the check box for a recipe or recipes you'd like to add, then select the course from the list of drop-down values as shown and click *+Add*.





10. To navigate between the sections to add more recipes, use the tabs at the top.



11. *Save & Close*

**Note:** At the bottom of the Menu Builder, you will find the Event Sales Menu Window. Instructions on how to use this window, in either location, are found below.

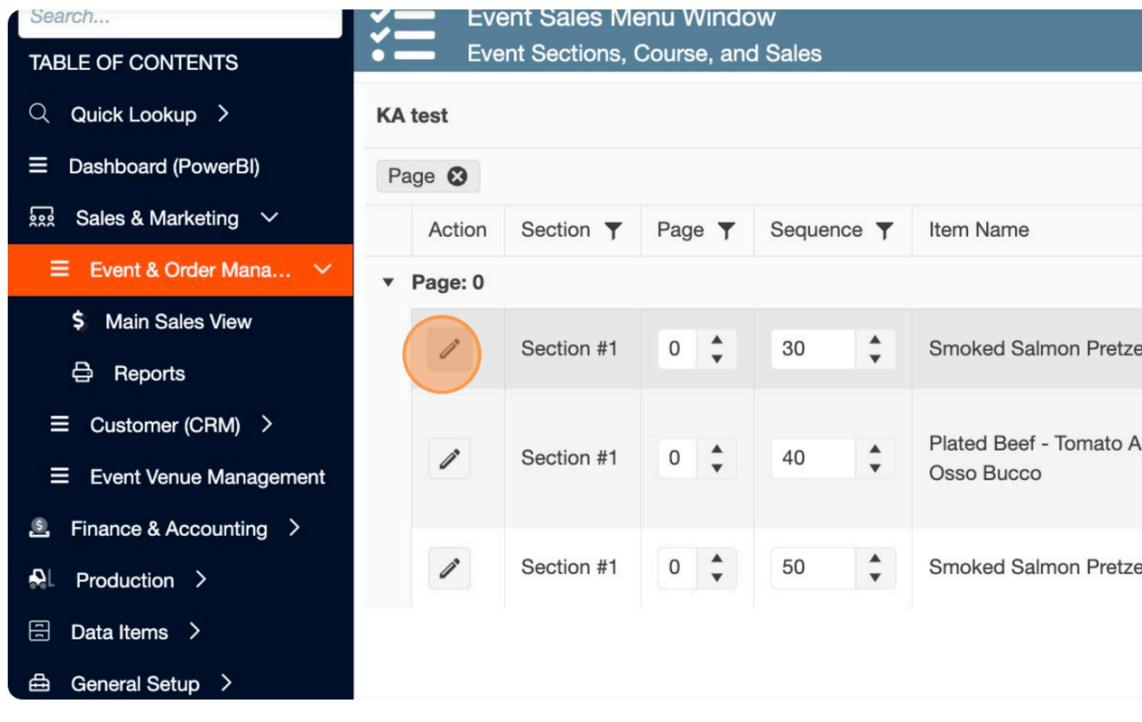
## Using the Event Sales Menu Window

Once a user has added recipes to their order, via order details or the Menu Builder, the Event Sales Menu Window can be used to quickly reorganize and prepare a menu to be shown to a client. Follow the steps below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*.
3. Click on *Main Sales View*
4. Select the *list icon* next to the pencil on the event you'd like to work on



5. Proceed to edit lines as needed, by clicking on the pencil icon of the item you'd like to edit



6. The following columns can be edited:

- a. Section – when using multiple sections, users can create distinct headers to separate items
- b. Page – use this column to move items from one page to another
- c. Sequence – use this column to re-order the items on a page
- d. Item Name – this can be edited for clients. The original item name will remain on production paperwork.

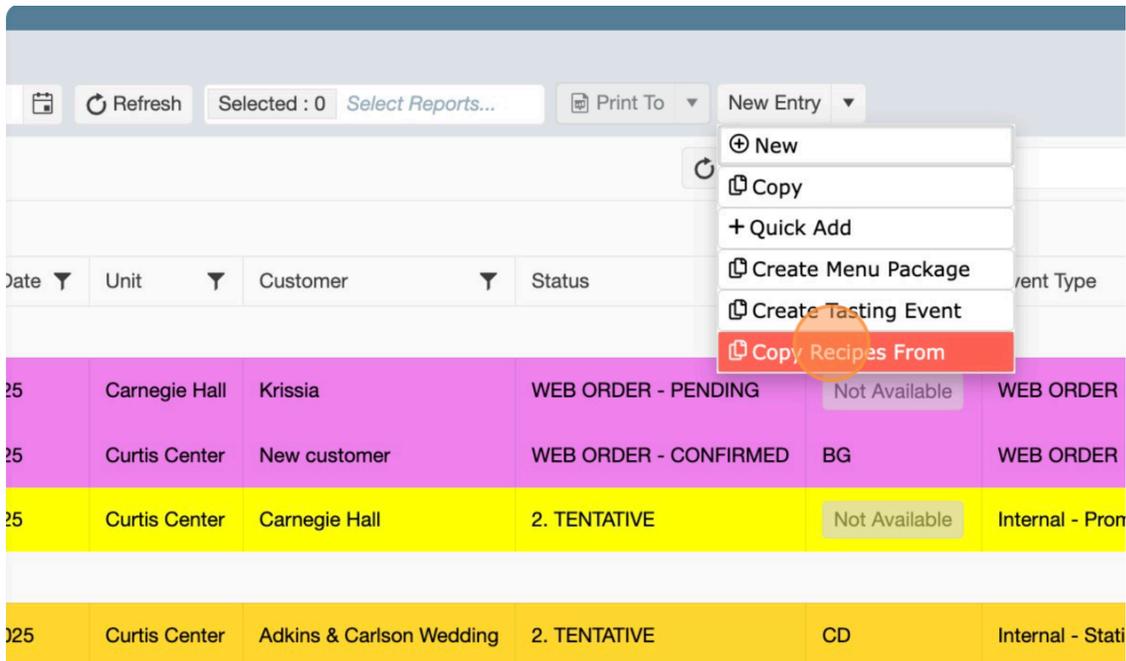
**Reminder:** when users change the item name or description, they will be forced to enter production notes (the last column on the Event Sales Menu Window)

- e. Course – this drop-down groups items by the course type
  - f. Description – client facing description of the item
  - g. Proposal Note
  - h. Quantity
  - i. Unit Price – Retail price per item
  - j. Total – sum of quantity times unit price
  - k. Reset Price – Allows users to return the price to the original, data item price
  - l. Temp – drop downs that allow the user to indicate the temperature for the kitchen
  - m. Production Notes – internal notes regarding production
7. Save and close each line item after editing, using the in-line *save icon*
  8. To add editable headers course names and descriptions, use the Add button on the top left-hand side.  
*This feature is not available in production yet. Update to follow.*

## Copy Recipes from Another Event

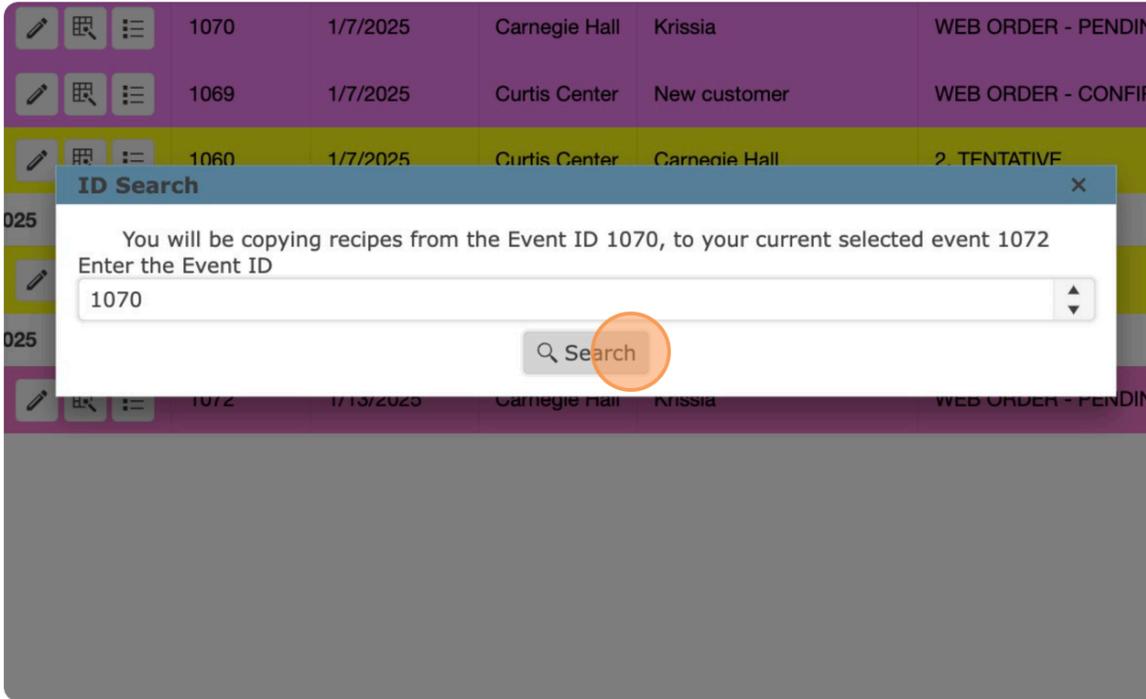
If a user has created a new event but wants to copy over the recipes from a previous event, they can follow the below steps. If a user wants to copy more than the recipe department, use the Copy Event function, outlined in a previous section.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included* or *Main Sales View Window*
4. Select the event that you want to copy recipes *to* by checking the box next to the pencil icon
5. Click on the down arrow next to the *New Entry* button
6. From the drop-down menu, select *Copy Recipes From*

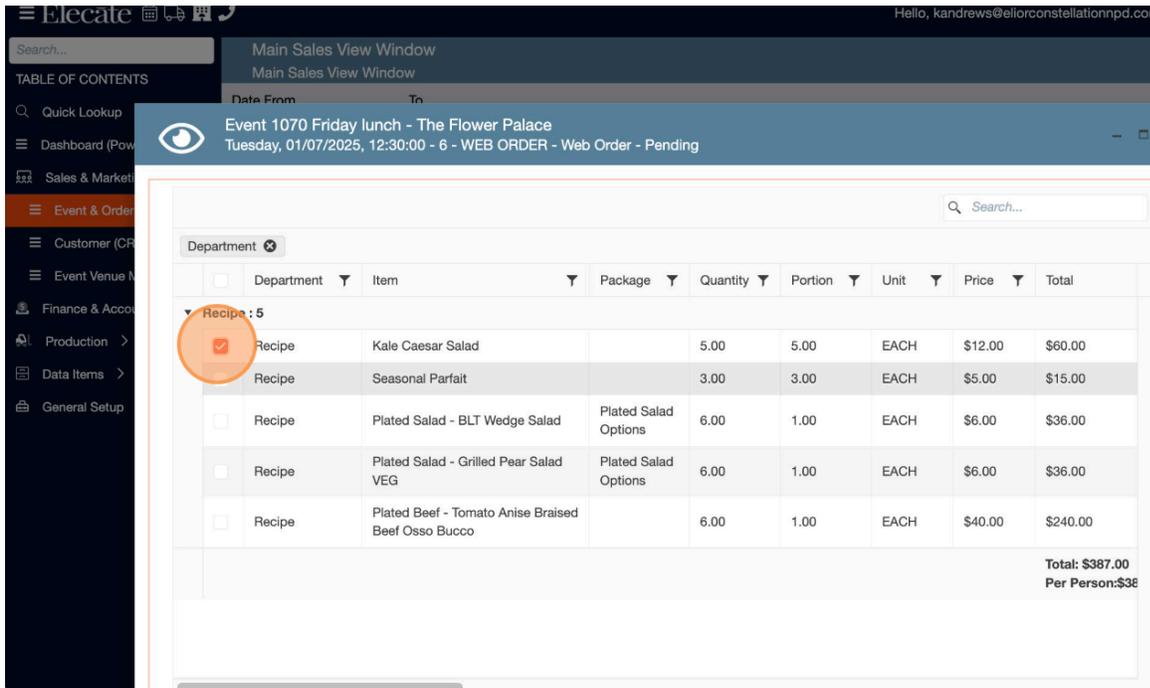


Date	Unit	Customer	Status	Event Type
25	Carnegie Hall	Krissia	WEB ORDER - PENDING	WEB ORDER
25	Curtis Center	New customer	WEB ORDER - CONFIRMED	WEB ORDER
25	Curtis Center	Carnegie Hall	2. TENTATIVE	Internal - Prom
25	Curtis Center	Adkins & Carlson Wedding	2. TENTATIVE	Internal - Stati

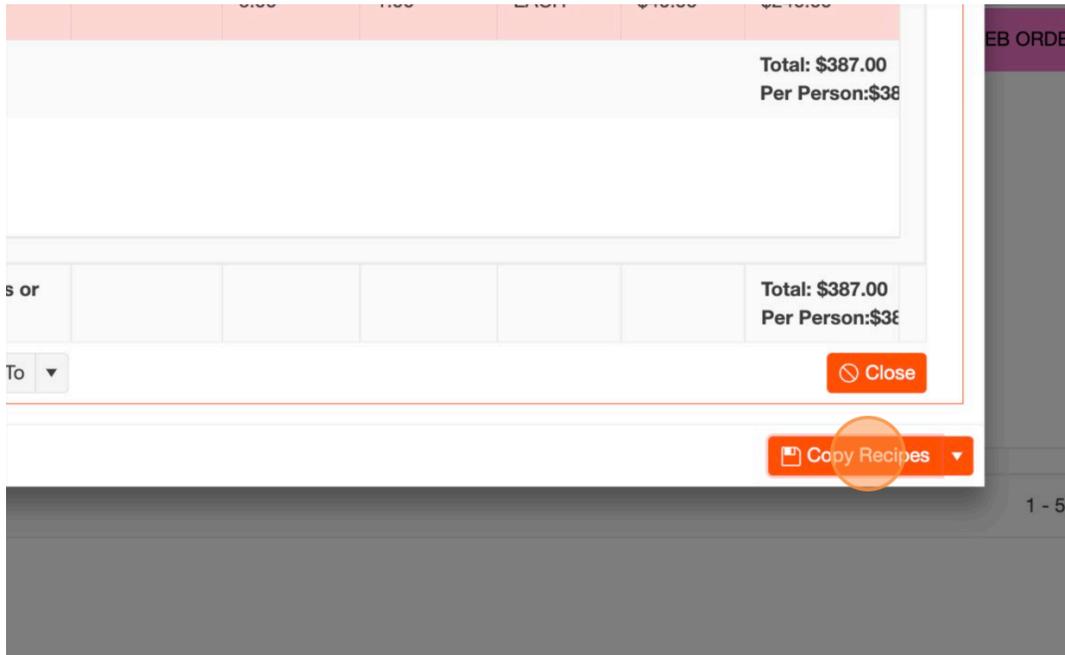
7. The *ID Search Window* will pop up. Users will now enter the Event ID number that they would like to copy *from*.



- The Recipe information from the original event will pop up, and users can then select which items to copy, as shown below



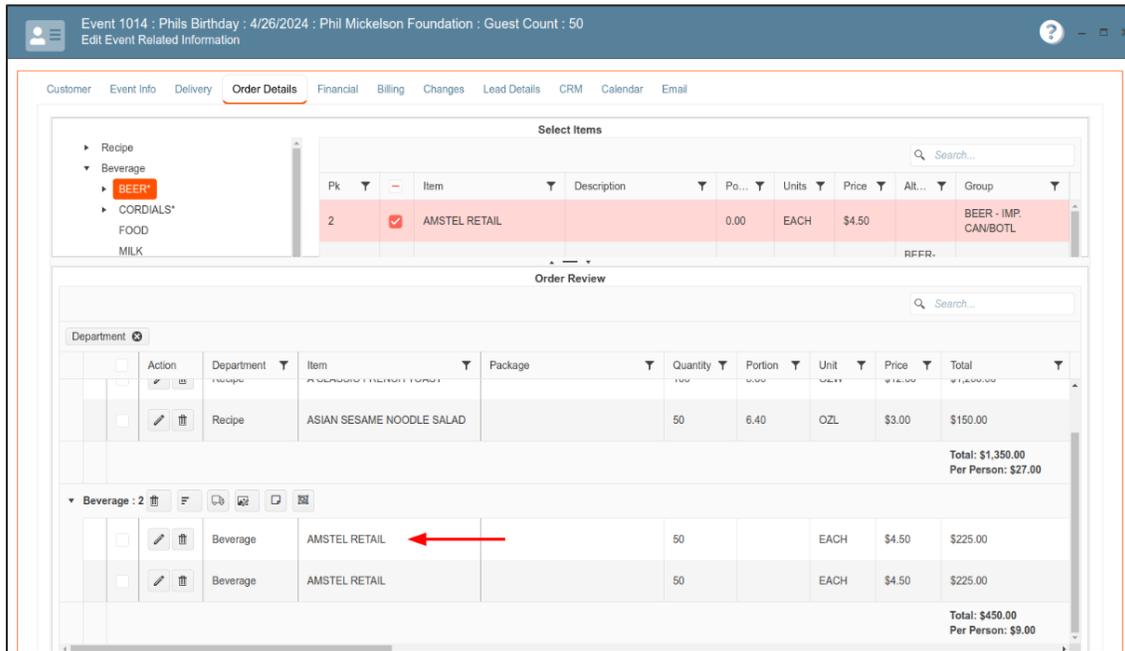
- Click on *Copy Recipes* to complete the copy process.



## Adding Items from the *Beverage* Department

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

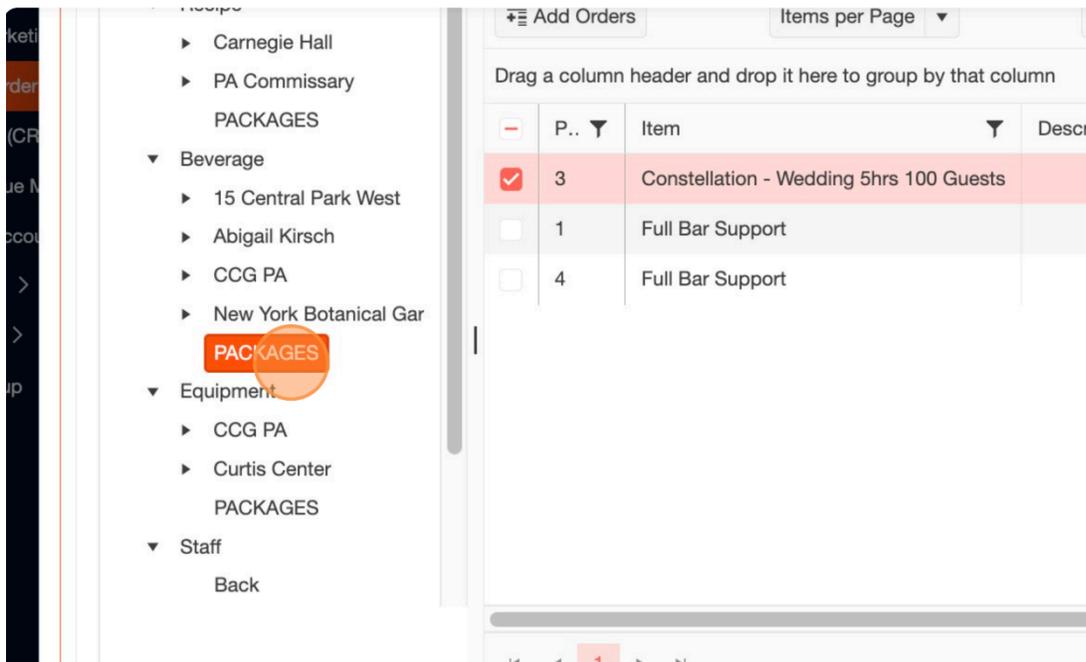
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included or Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Beverage* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity, Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*



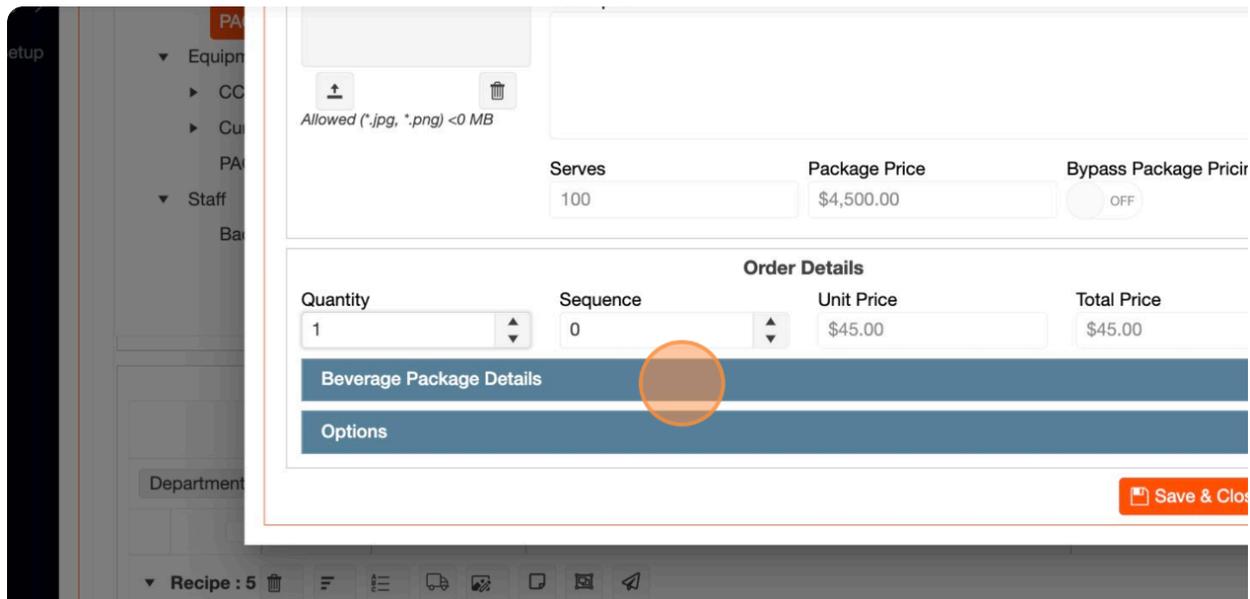
**Important:** To save items, the event entry must have been completed and saved first.

## Adding Beverage Packages

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included or Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Beverage* department and double click on the *PACKAGES* option



7. Available packages will appear under the *Select Items* section
8. By double clicking any of the packages, and expanding the *Beverage Package Details* section, users can see the contents of the package



9. Review *Quantity*, *Description*, and other details
10. Click on save and close
11. The package will appear under *Order Review*

## Adding Items from the *Equipment Department*

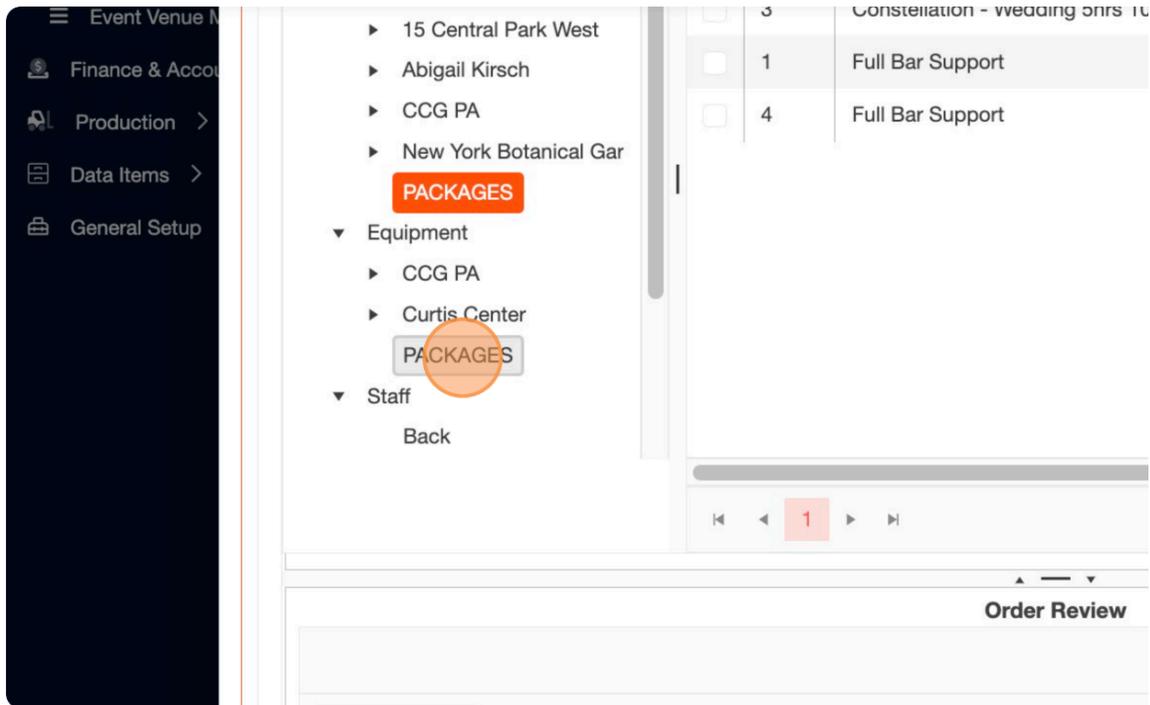
From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included or Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Equipment* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*

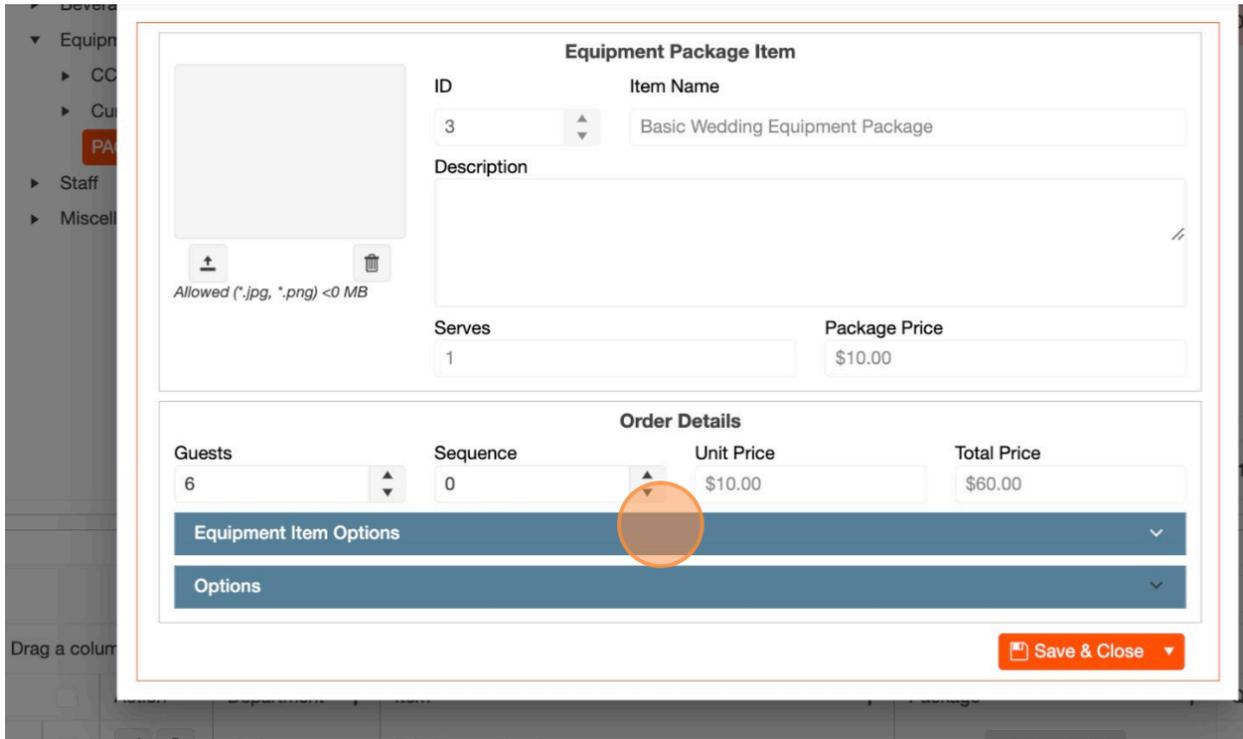
**Important:** To save items, the event entry must have been completed and saved first.

## Adding Equipment Packages

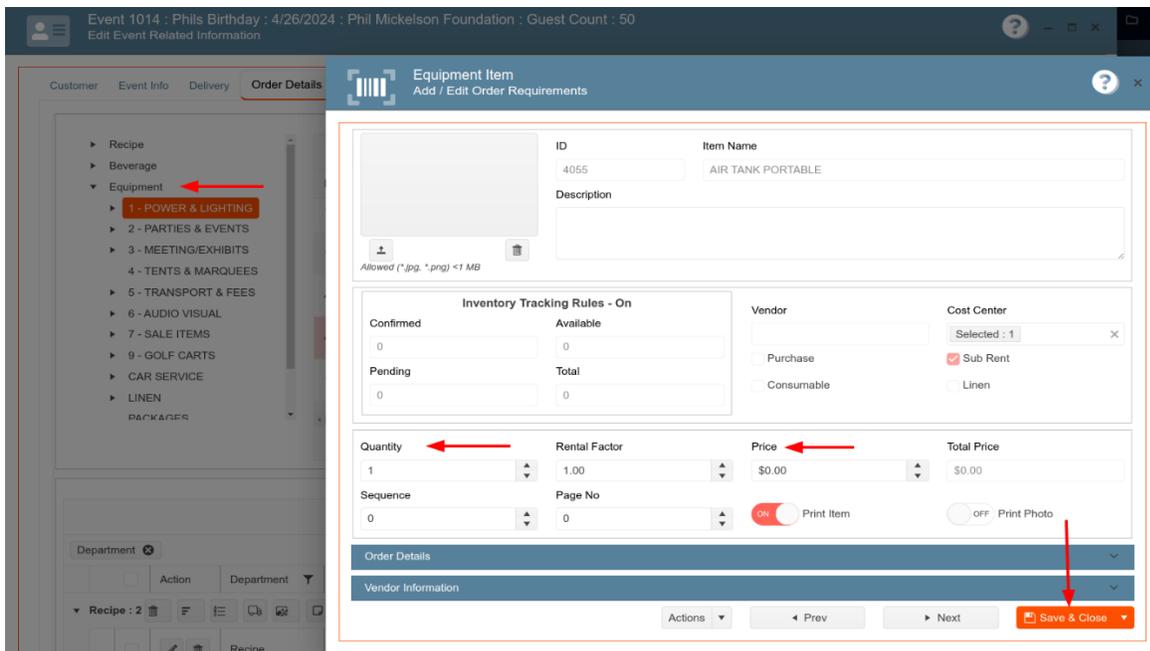
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included or Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Equipment* department and double click on the *PACKAGES* option



7. Available packages will appear under the *Select Items* section
8. By double clicking any of the packages, and expanding the *Equipment Package Details* section, users can see the contents of the package



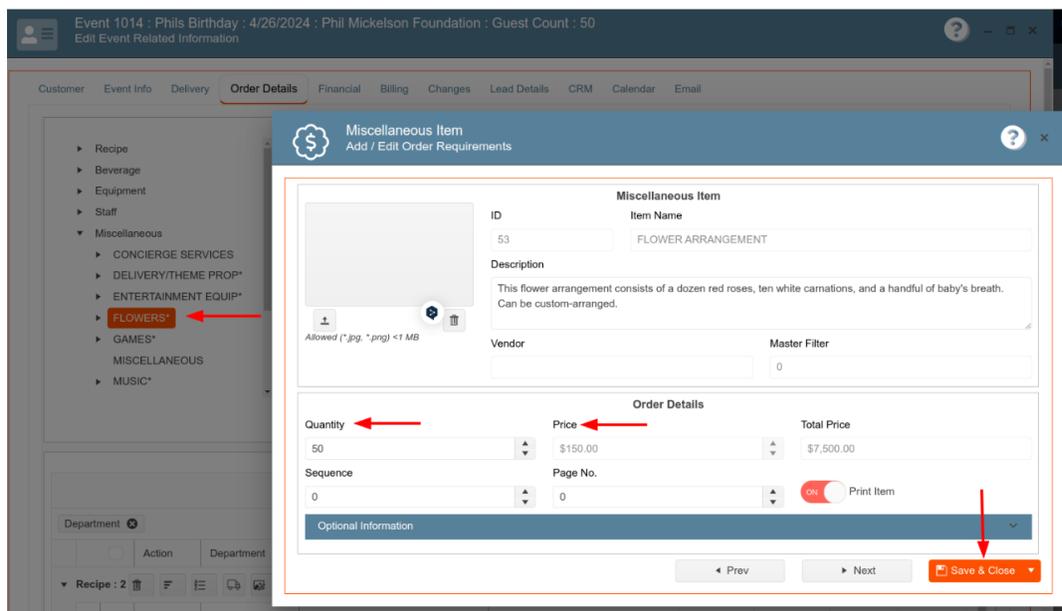
9. Review *Quantity*, *Description*, and other details
10. Click on save and close
11. The package will appear under *Order Review*



## Adding Items to the *Miscellaneous* Department

From the event window you can add items such as outside rentals, florals and third-party services in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Miscellaneous* department and navigate through the various options. The department details will appear in *Select Items*.
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity*, *Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*

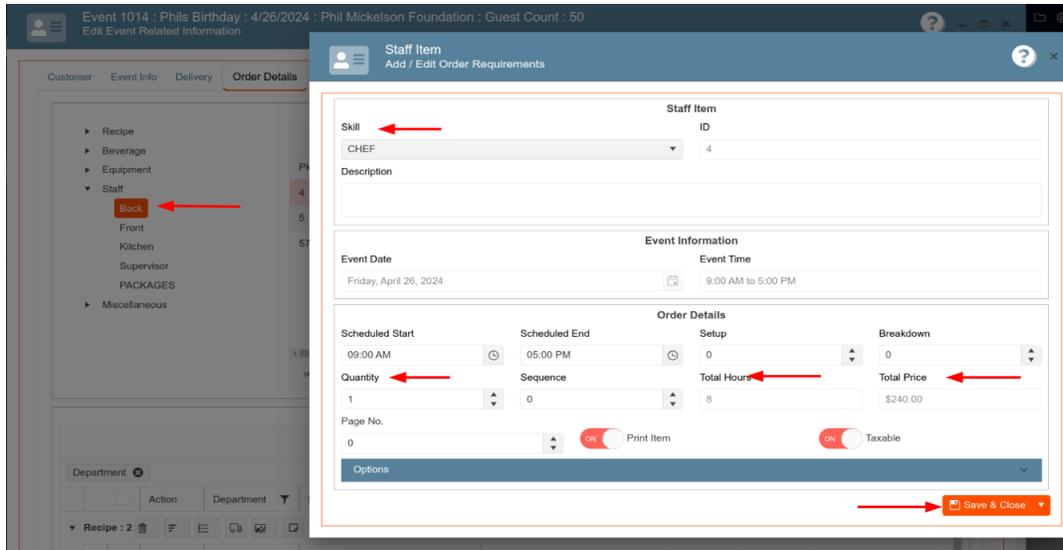


## Requesting Staff in the *Staff* Department

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included* or *Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Staff* department and navigate through the various options. The department details will appear in *Select Items*.

7. Add the desired role by double-clicking on it, an *Add/Edit* window will pop up
8. Fill out the details such as shift times (hours before and after the event begins and ends) and quantity
9. Expand the *Options* section to select the uniform and input meal information, if applicable
10. Click on *Save* and close
11. The requested skill types will appear under *Order Review*



## Proposals

After completing the customer and event info tabs, as well as as much of the delivery and order details tabs as desired, users will now navigate to the *Proposal* tab. This is where client facing pricing and details will be entered.

### Adding and Editing Line Items

To access the *Proposal Tab*, follow the steps below.

1. Click on the *Sales & Marketing* section located on the left panel
2. Click on *Event & Order Management*
3. Click on *Main Sales View Window*
4. Select an event by clicking on the pencil button or double-clicking on the event row
5. In the tabs row click on *Proposal* option

If the user has entered items into the *Order Details Tab*, the sum of those items, by revenue code, will carry over to the *Proposal Tab*.

To Edit the Revenue Codes that have come in from *Order Details*, follow the below steps:

1. Click the *pencil icon* on the revenue line to edit

Customer Event Info Delivery Order Details **Proposal** Financial Billing Cha

+ Add

Department ✕

<input type="checkbox"/>	Action	Revenue Code	Department	Item
<b>Equipment</b>				
<input type="checkbox"/>	 	Equipment	Equipment	
<input type="checkbox"/>	 	Equipment	Equipment	
6 Guests				
<b>Menu</b>				
<input type="checkbox"/>	 	Food	Menu	
<input type="checkbox"/>	 	Food	Menu	
6 Guests				

2. Fill in or change the *Item Name, Description, Quantity, and Price*, as needed
3. Click the *Save icon* in the *Action* column to save the data entered

Event 1006 Coda Hospitality Test Event 1 - Curtis Center | The Atrium  
Wednesday, 01/15/2025, 10:00 AM - 6 - AM Break - Definite

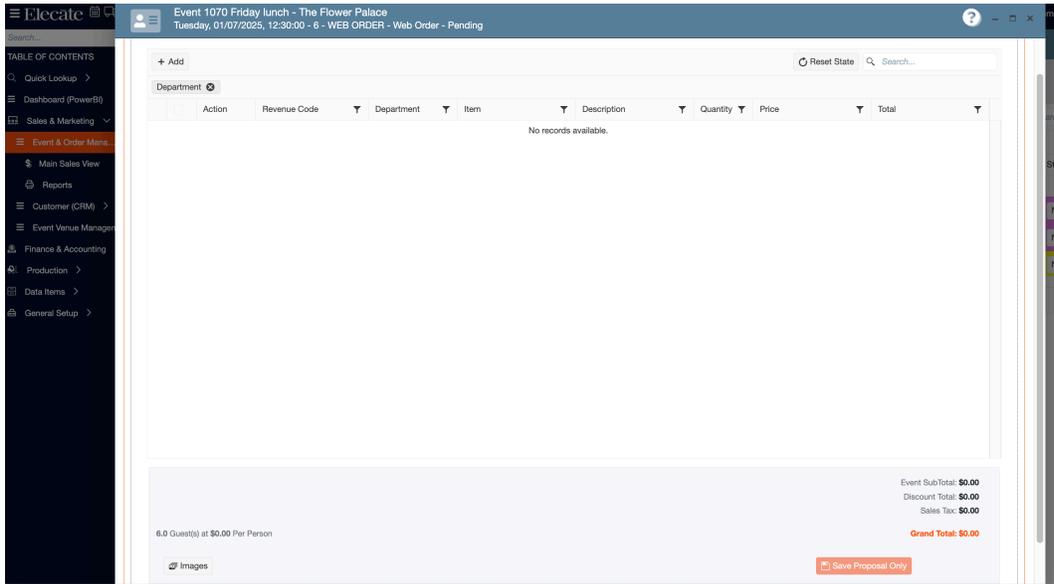
Customer Event Info Delivery Order Details **Proposal** Financial Billing Changes Lead Details CRM Calendar Email

+ Add Reset State

Department ✕

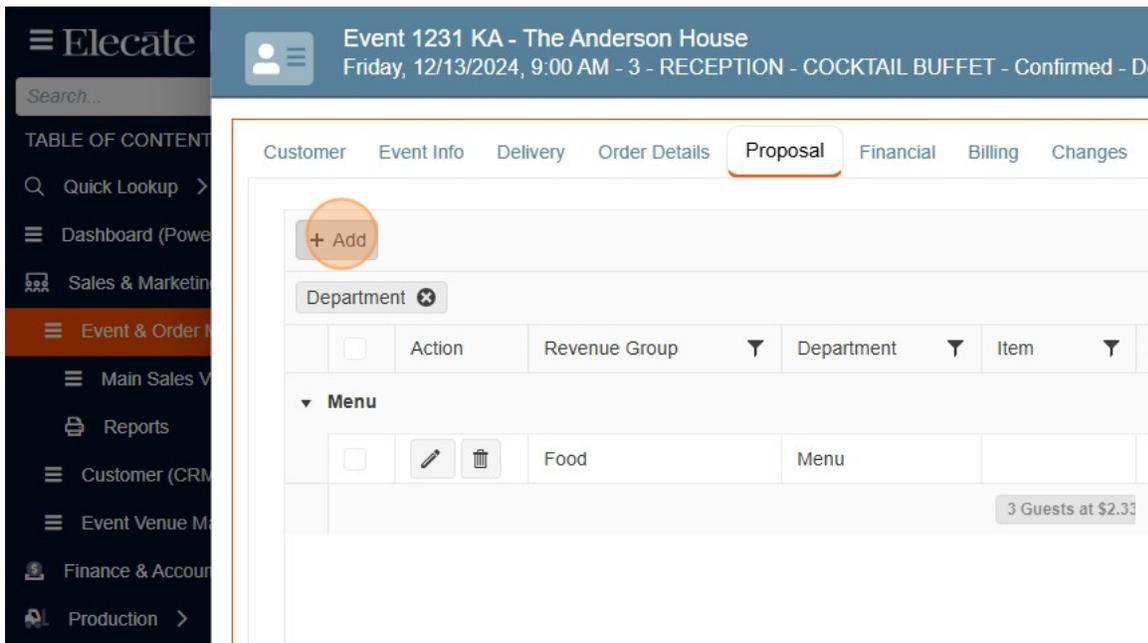
<input type="checkbox"/>	Action	Revenue Code	Department	Item	Description	Qu
<b>Equipment</b>						
<input type="checkbox"/>	 	Equipment <span>✕</span>	Equipment	Equipment for Se... <span>✕</span>	<input type="text" value=""/>	1.
<input type="checkbox"/>	 	Equipment	Equipment			
<b>Menu</b>						
<input type="checkbox"/>	 	Food	Menu			
<input type="checkbox"/>	 	Food	Menu			1
6 Guests at \$6.33 per person						

If no items have been added to the *Order Details Tab*, the *Proposal Tab* will be blank, as shown below.



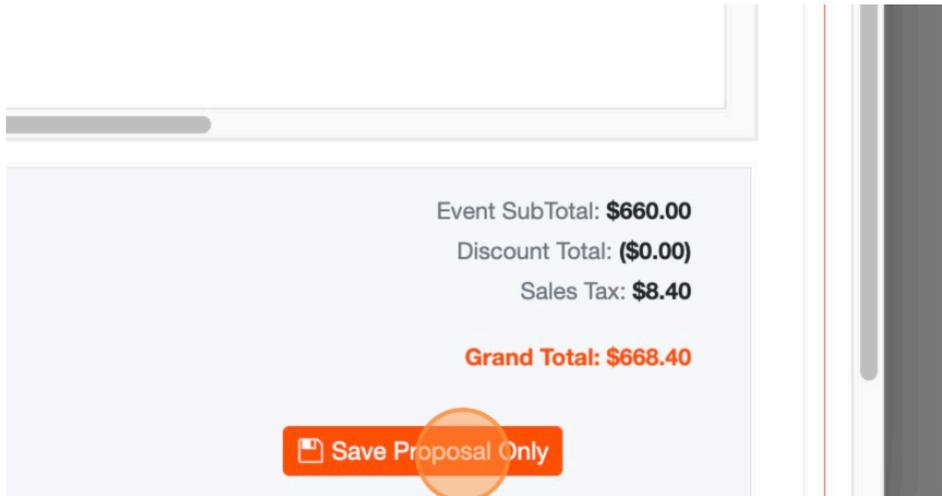
Users can now ADD items to generate on their *Proposal Tab* by following the below steps:

4. Click on the *Add Button* to create a new proposal line item



5. Upon clicking Add, a new line will appear below. Follow these steps to complete it:
  - a. Select the desired category under *Revenue Code* from the drop-down options. In this example, we'll use Florals.
  - b. Next, users can either free-type the Item (such as Center Pieces), or select from pre-set items, where applicable.
  - c. In the next column, users can enter a description (such as long and low floral arrangements for 25 dinner tables).
  - d. Next, input the quantity and price of the items (example, 25 at \$100 each).

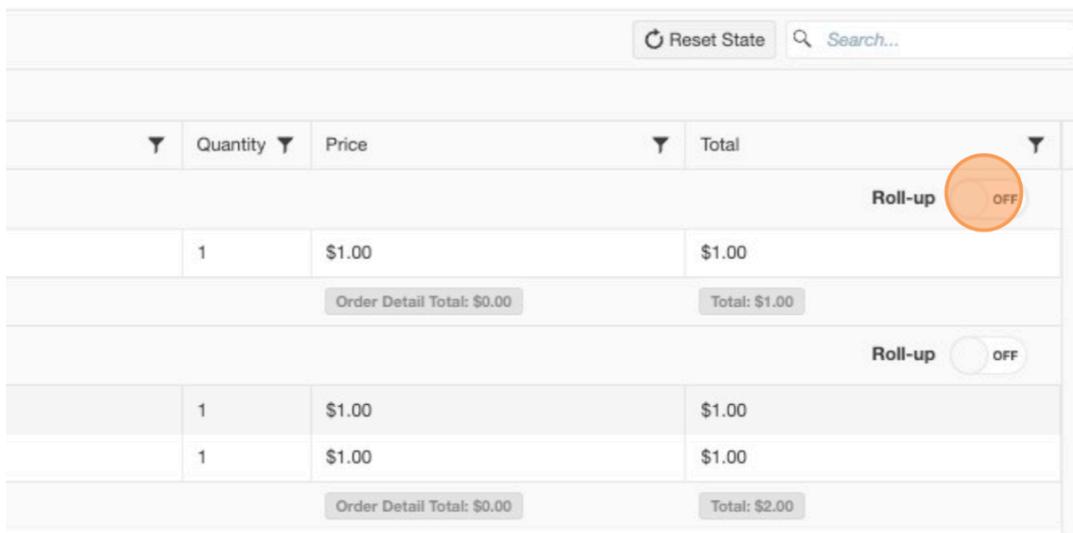
- e. Click the *Save icon* in the *Action* column to save the data entered
6. Save the proposal, by clicking the Save Proposal Only button



## Proposal Roll Ups

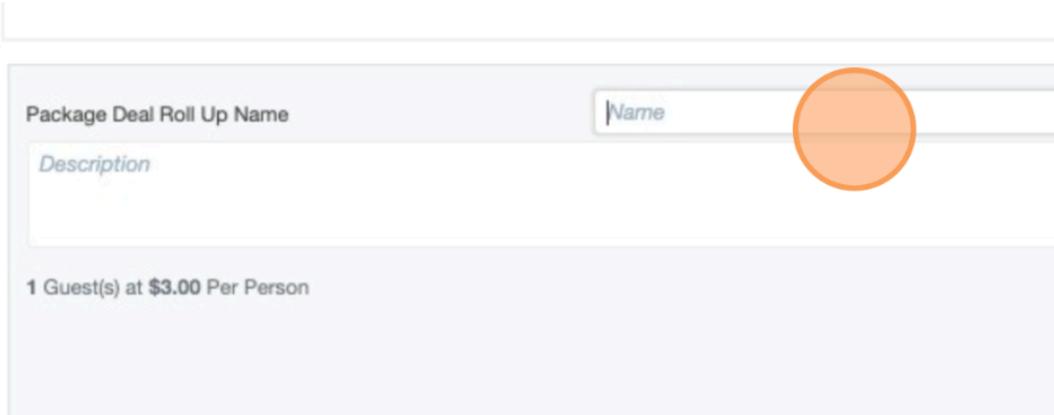
In addition to adding and editing the revenue codes, users can create “roll ups” that control what the client sees, while still allocating the revenue to the appropriate bucket behind the scenes.

1. Once two or more revenue codes have been added to a proposal, the *Roll-up toggle* can be turned on.



	Quantity	Price	Total	
				Roll-up <input checked="" type="radio"/> OFF
	1	\$1.00	\$1.00	
Order Detail Total: \$0.00			Total: \$1.00	
				Roll-up <input type="radio"/> OFF
	1	\$1.00	\$1.00	
	1	\$1.00	\$1.00	
Order Detail Total: \$0.00			Total: \$2.00	

2. When two revenue codes have the *Roll-up toggle* set to On, the below section will appear at the bottom of the *Proposal Tab*

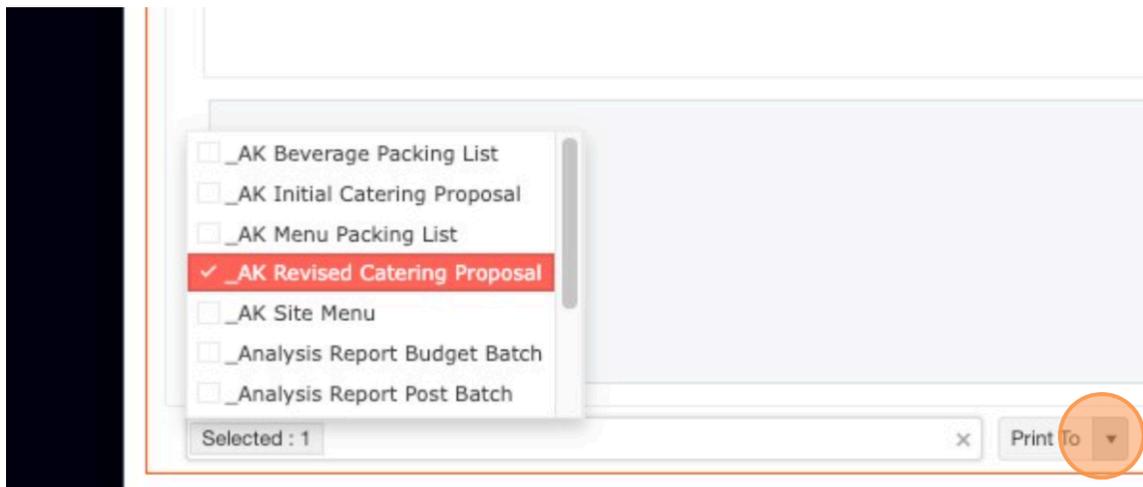


3. Users can fill in the *Name* of the Roll Up and the *Description*. When this information prints on the Proposal, the Roll Up will be visible, now the individual revenue groups included.
4. Save the *Roll Up*
5. Save the *Proposal*

## Printing Proposals

After completing the *Proposal* tab as outlined above, users can navigate to the *Select Reports* field at the bottom of any tab of the event, by following the steps below:

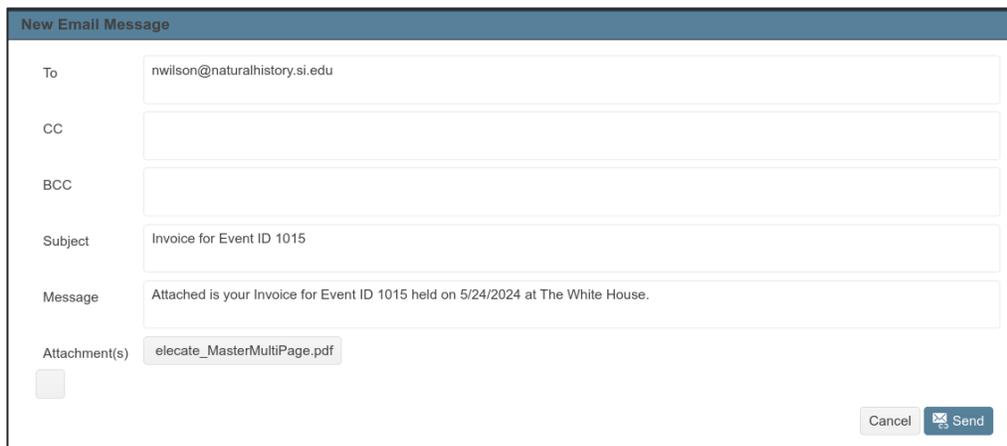
1. Click on the *Sales & Marketing* section located on the left panel
2. Click on *Event & Order Management*
3. Click on *Main Sales View Window*
4. Select an event by clicking on the pencil button or double-clicking on the event row
5. On any tab, navigate to the *Select Reports*, choose the desired proposal and desired printing option



## How to Email a Proposal

Users can send proposals to clients within the Elecate application by following the steps below:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included* or *Main Sales View Window*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Click into the box and select the desired catering proposal. This will work from any tab.
7. Click on the down arrow next to the *Print to* button and select *Send Email*, a *New Email Message* screen will pop up
8. Customize your message and click on *Send*.



The screenshot shows a 'New Email Message' form with the following fields and content:

- To:** nwilson@naturalhistory.si.edu
- CC:** (empty)
- BCC:** (empty)
- Subject:** Invoice for Event ID 1015
- Message:** Attached is your Invoice for Event ID 1015 held on 5/24/2024 at The White House.
- Attachment(s):** elecate\_MasterMultiPage.pdf

At the bottom right, there are two buttons: 'Cancel' and 'Send' (with an envelope icon).



# Collecting Client Signatures and Payments

## Collecting Sign Off

Once a client has received a proposal and is ready to sign, they will click the link embedded in the document. This will direct them to the signature and payment portal.

Additional detail in this section to be added.

## Collecting Client Payment via Portal

As with the signature collection, clients can use the link embedded in their proposal to provide payment via the portal. The portal allows customers to pay via ACH or Credit Card by filling out the required fields on the screen.

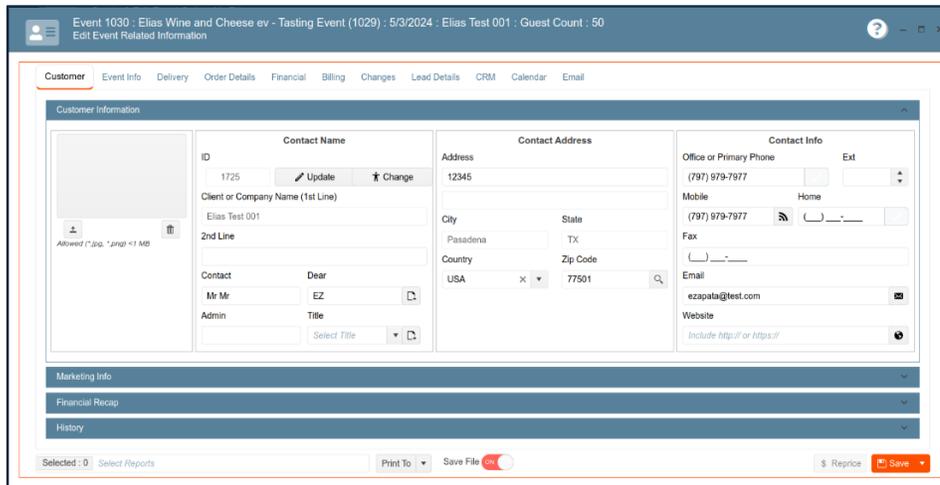
Additional detail in this section to be added.

# Event & Order Management

## Editing an Existing Event

Once you have one or more events entered, you can make changes as needed:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, and select either *Event Management All Status Types Included* or *Main Sales View Window*
3. Open the event by clicking on the pencil icon or by double-clicking on the event row
4. Make the changes and click on *Save*



The screenshot displays the 'Edit Event Related Information' window for 'Event 1030 : Elias Wine and Cheese ev - Tasting Event (1029) : 5/3/2024 : Elias Test 001 : Guest Count : 50'. The window is divided into several sections:

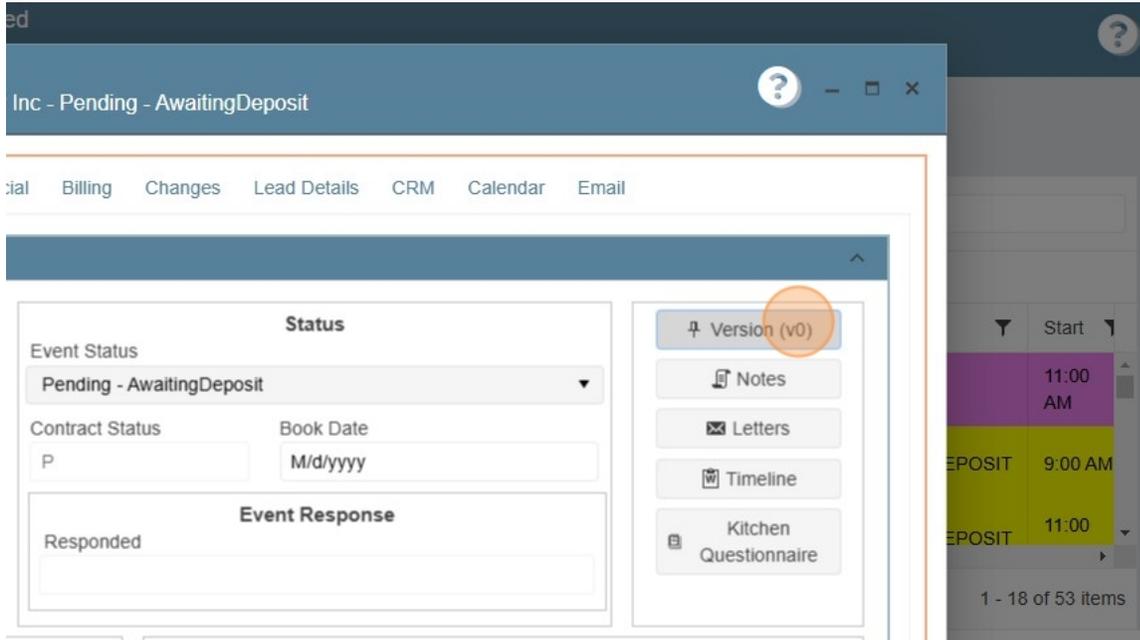
- Customer Information:** Contains fields for ID (1725), Contact Name (Elias Test 001), Address (12345), City (Pasadena), State (TX), Country (USA), and Zip Code (77501). It also includes fields for Contact Info (Office or Primary Phone, Mobile, Home, Fax, Email, Website) and a 'Contact' dropdown menu.
- Marketing Info:** A section for marketing-related information.
- Financial Recap:** A section for financial information.
- History:** A section for event history.

At the bottom of the window, there are buttons for 'Print To', 'Save File', 'Reprint', and 'Save'.

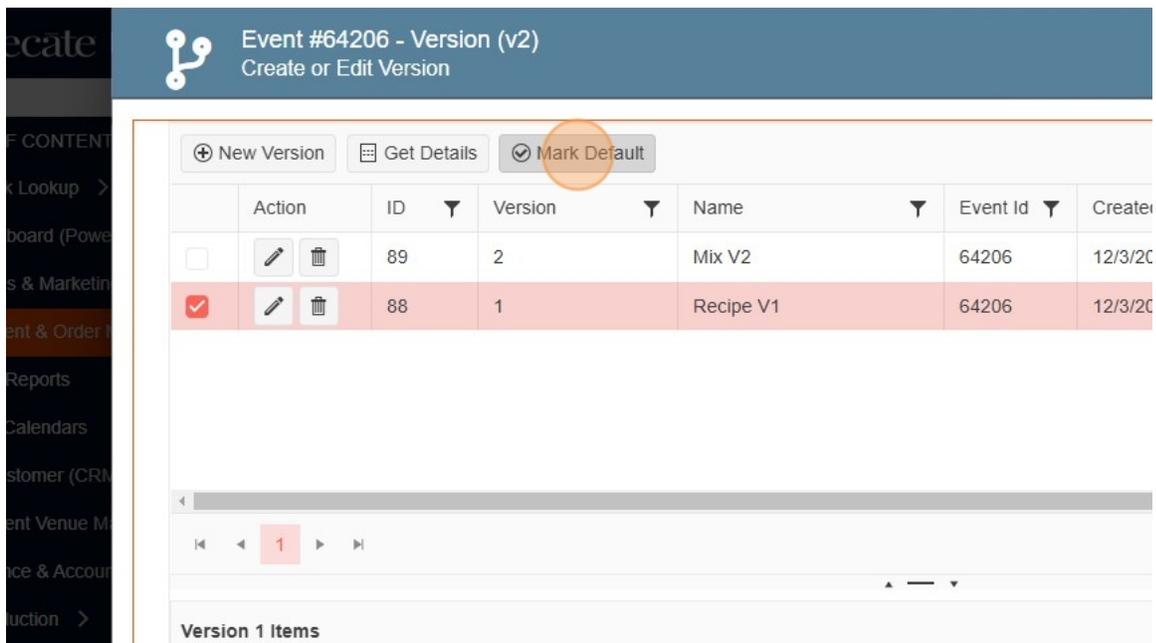
## Creating Versions

As events are always changing, you can create versions of event orders to revert to or reference.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Main Sales View Window*
4. Choose an event or click the pencil icon
5. Navigate to the *Event Info* tab, then click the Versions button on the right-hand side



6. Click the New Version Button at the top of the page
7. Next steps to be added

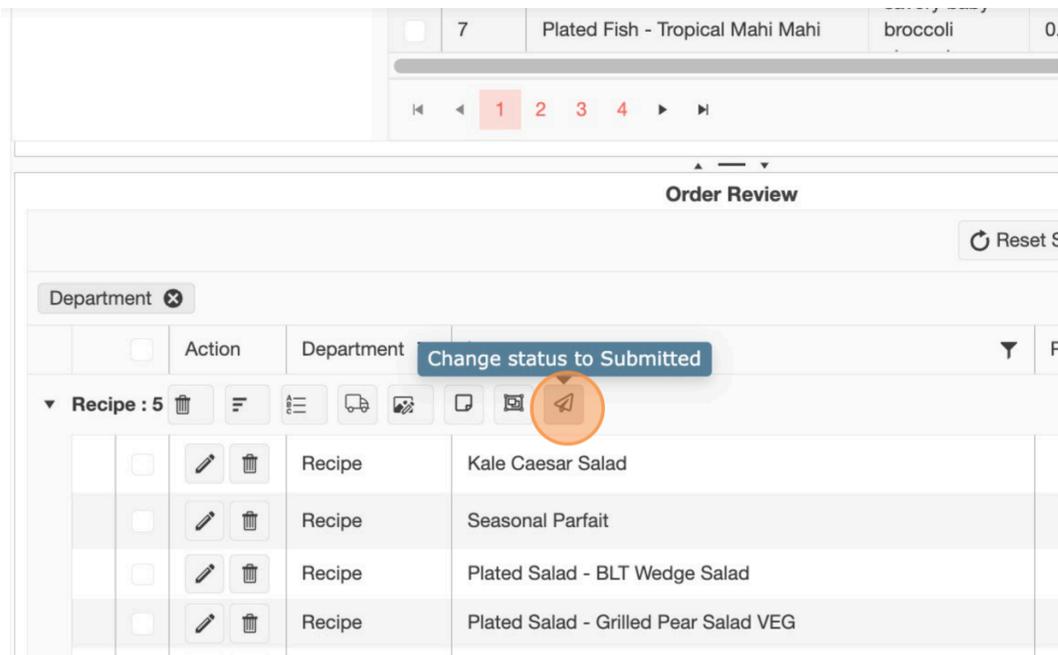


## Submitting Orders

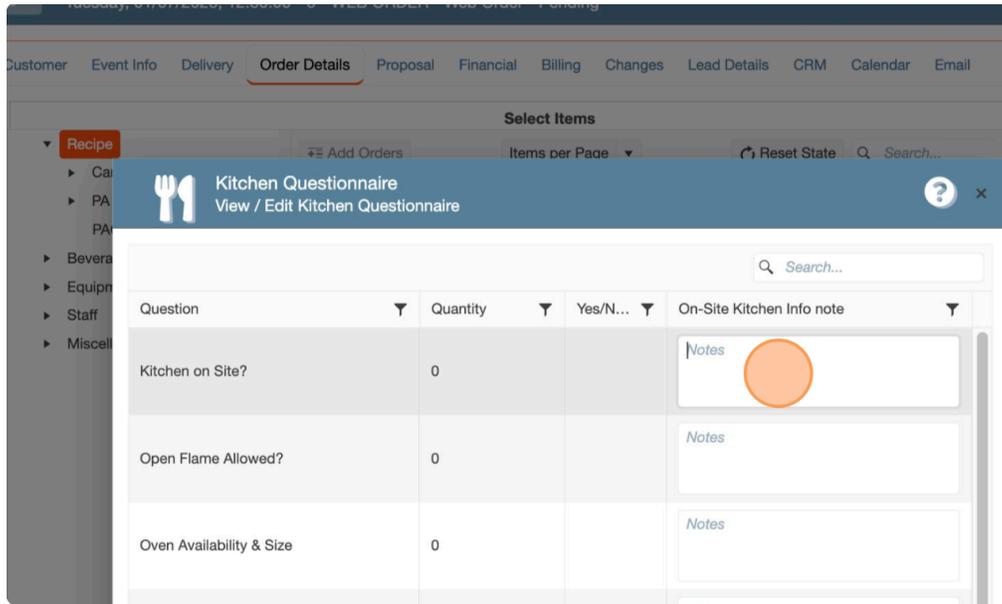
When the Sales department has finished their order for each department, they need to submit that order. The submission process tells the other departments (Kitchen, Operations, and Staffing) that they can begin filling the order. This process prevents Sales from making additional changes. Below is the process for submitting orders, by department:

### Submitting Recipes

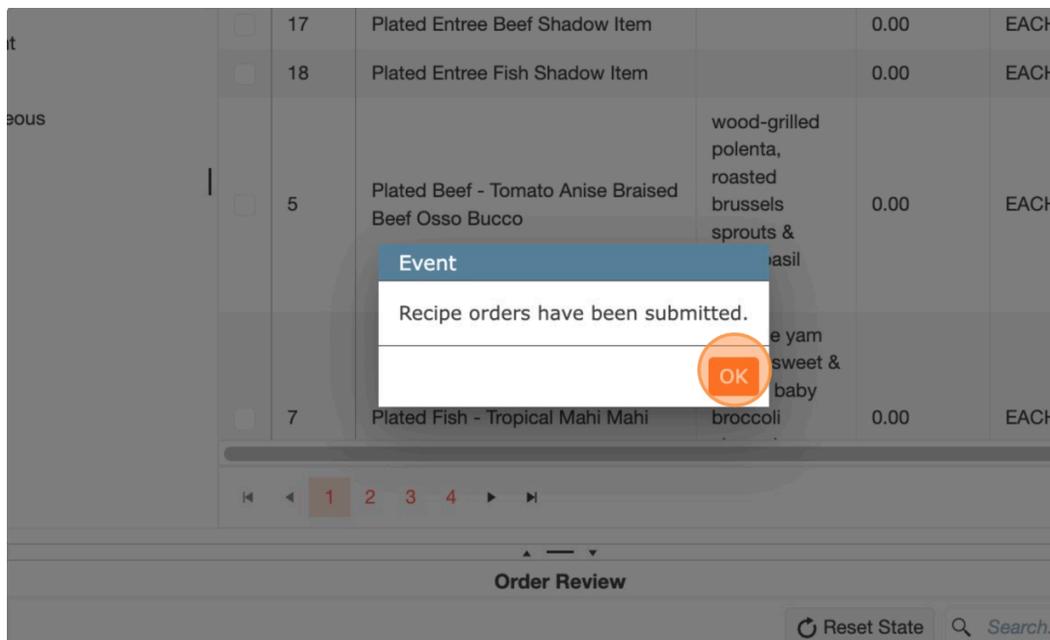
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Main Sales View Window*
4. Choose an event or click the pencil icon
5. Navigate to the *Order Details tab*
6. Scroll down to the *Order Review Section*
7. Click on the triangle next to the Recipe header to expand the department
8. Click on the *paper airplane icon* to submit the recipe order to the kitchen



9. Submitting the recipes will trigger the *Kitchen Questionnaire* to pop up. These questions must be completed.



- Once the questions have been answered and submitted, the Recipe orders will be sent to the kitchen. Sales users will no longer be able to edit or add to their order without submitting a change request (reviewed in the next section) or asking the kitchen to return their menu for further editing.



### Submitting Beverage, Equipment and Staff Orders

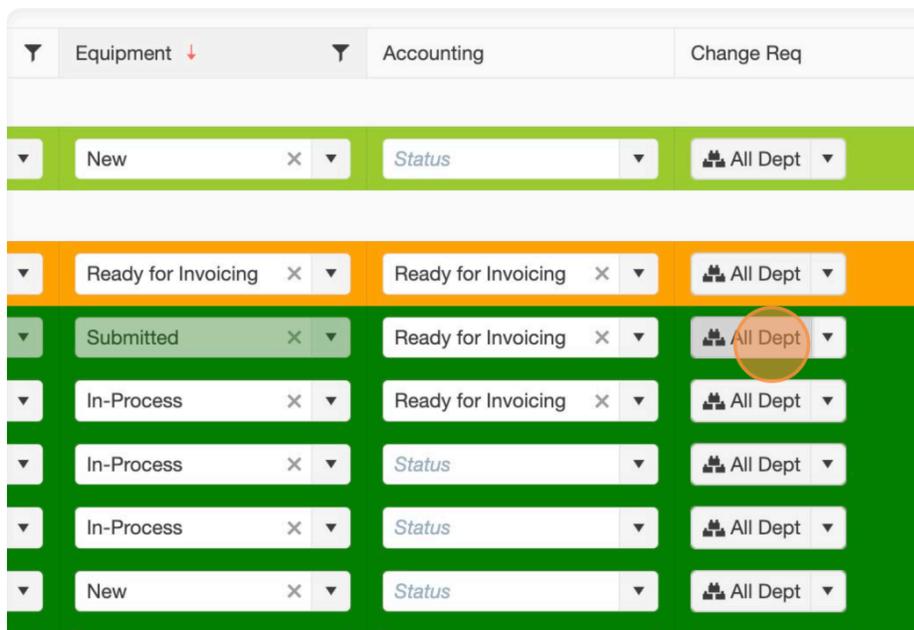
- Click on the *Sales and Marketing* section located on the left panel
- Click on *Events & Order Management*
- Click on *Main Sales View Window*
- Choose an event or click the pencil icon
- Navigate to the *Order Details* tab
- Scroll down to the *Order Review* Section
- Click on the triangle next to the department header that you want to submit
- Click on the *paper airplane icon* to submit the order for that department

9. Click *OK* to confirm the submission
11. Sales users are now blocked from editing that department's order without submitting a change request (reviewed in the next section) or asking the department to return their order for further editing.

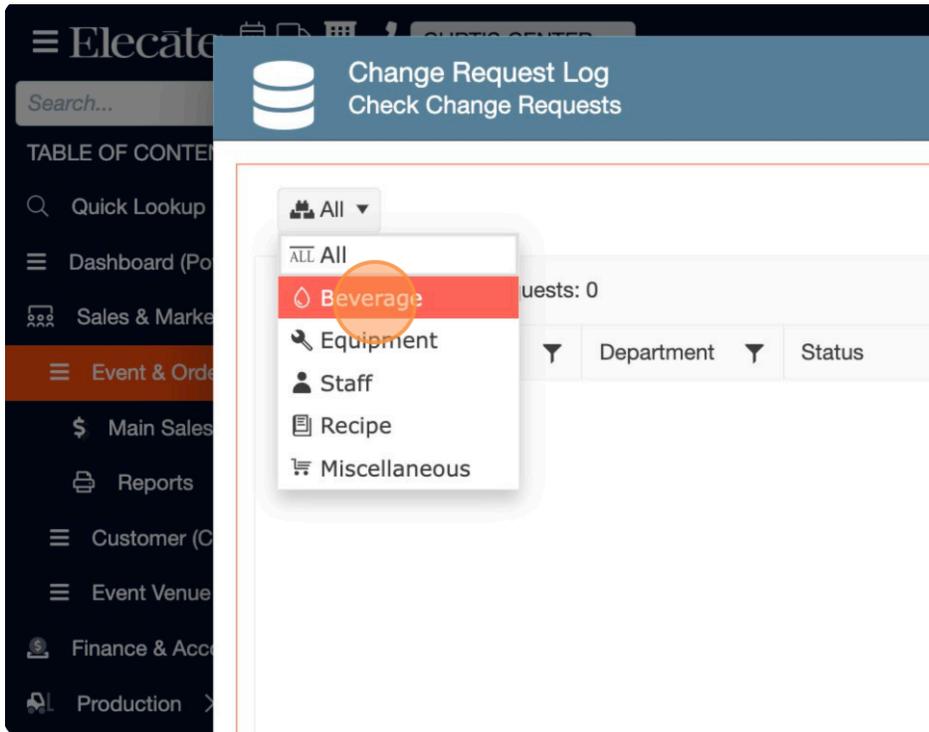
## Creating Change Requests

After a Sales User has submitted their order to a department, they are unable to make changes to that order using Order Details, Menu Builder, etc. Instead, they must follow one of the below processes to submit a change:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Main Sales View*
4. Identify an event you want to place a Change Request for and click the *All Dept* button (far right column).



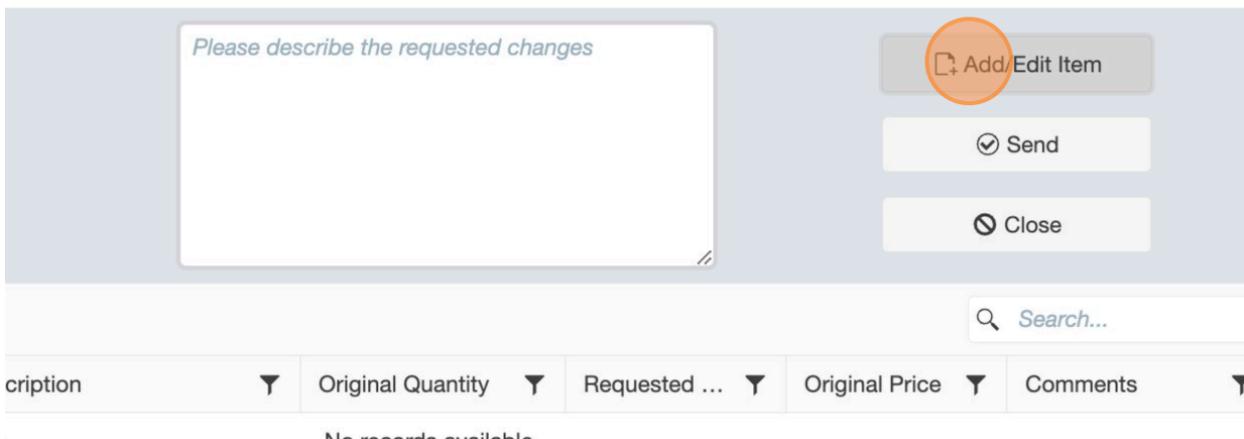
5. Navigate to the *All* button, and select the department from the drop down for which you need to submit a change



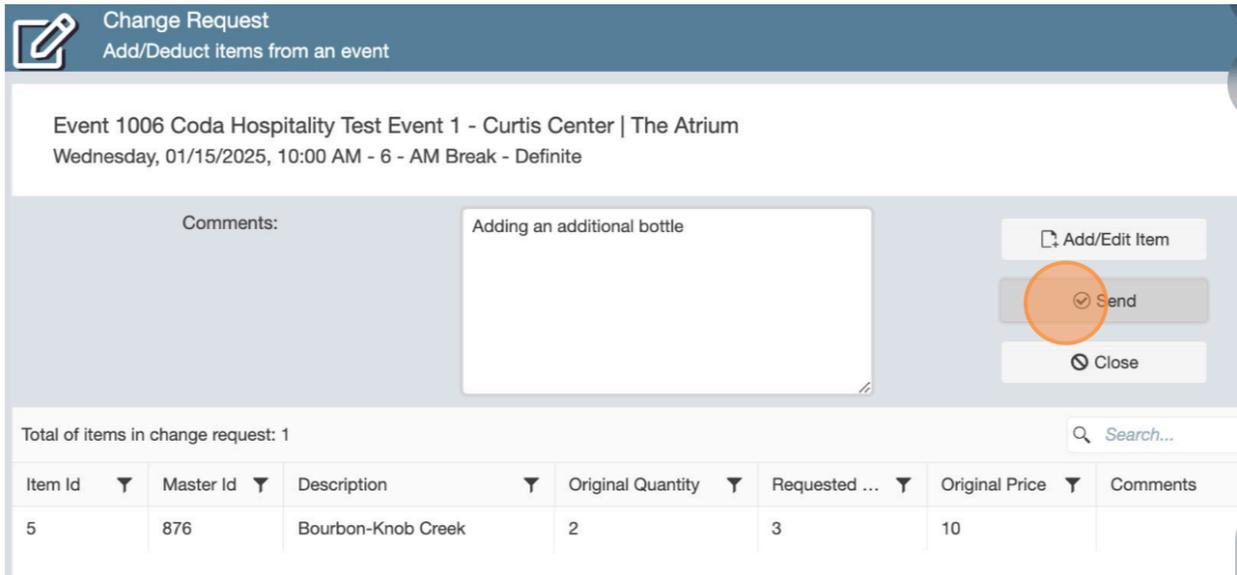
6. Click Create New at the bottom of the window
7. Click on the *Add/Edit Item* button



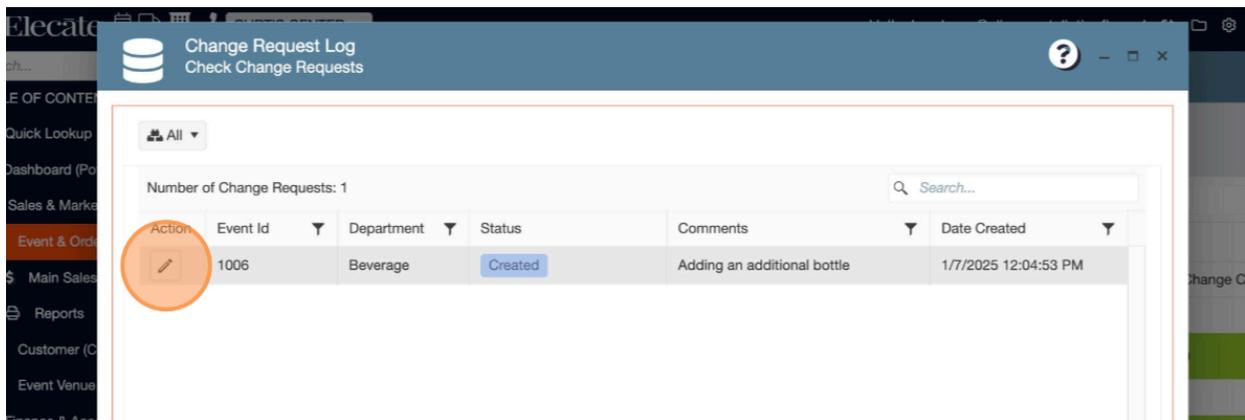
/ Test Event 1 - Curtis Center | The Atrium  
 AM - 6 - AM Break - Definite



8. This will bring up the submitted order for that department, and allow users to edit quantities, etc.
9. Once the change has been made, close the order window. The *Change Request* screen will appear again, showing what was edited, as shown below



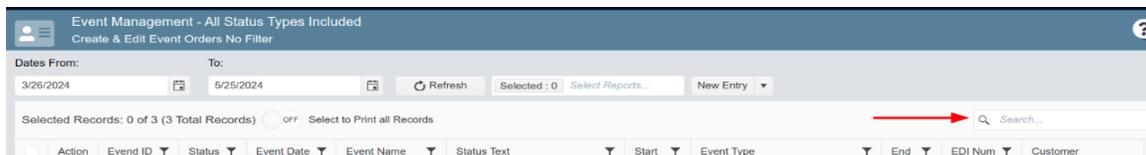
10. Users must then enter a Comment in the *Comments Field*, and click send
11. Items will now be marked as Pending until approved and comments will be visible in review window. Once a change has been accepted, users will be able to see that in the same window.



## Searching for Events

To quickly find an event, you can choose any of the following options:

1. Option One
  - a. Click on the *Sales and Marketing* section located on the left panel
  - b. Click on *Events & Order Management*, the *Event Management* window or *Main Sales View Window* will appear
  - c. On the search bar located on the upper right corner you can look for you event by name, date, or event ID.



2. Option Two

- a. Users can reference the *Event Calendar* by double clicking on the calendar located on the top of the screen next to Elecate’s logo.



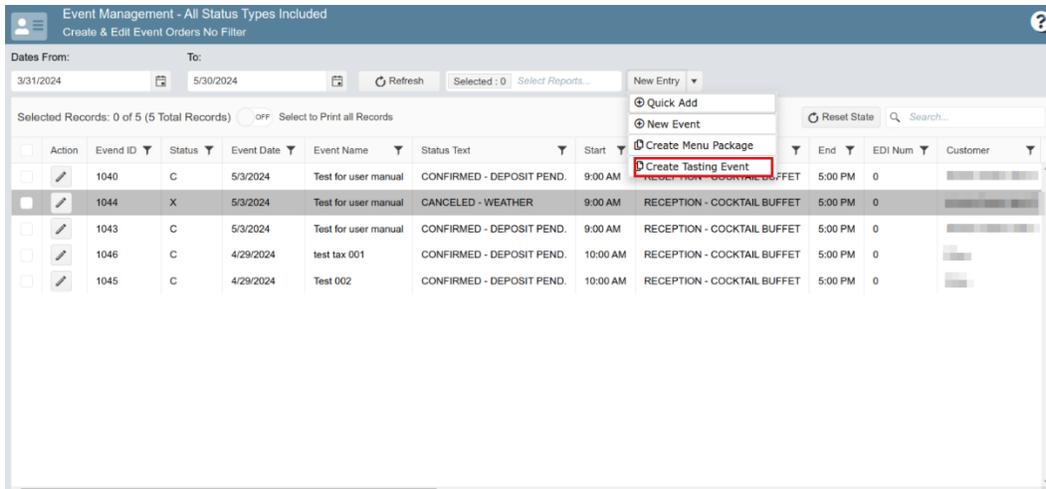
3. Option 3

- a. Click on the *Quick Lookup* link on the left-hand navigation panel
- b. Select the *Event ID Search* or *Customer Search* and type in the relevant details

## Creating a Tasting Event from an Existing Event

To create a tasting event from the parent event, copying over the relevant details, follow the instructions below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included* or *Main Sales View Window*
4. Check the box next to the event for which you’d like to create the tasting
5. Click on the down arrow next to the *New Entry* button
6. From the drop-down menu, select *Create Tasting Event*



7. Pop-Up will appear
8. Enter the Tasting Event Date in the New Event Date

9. Select the departments you want to copy from the parent event to the tasting event. Uncheck the box for orders you do not wish to copy over.
10. When you have entered all the information, click on *Create Event*

📄 Tasting Event Process Window  
 Create Tasting Event from Parent Event ? x

**Customer Billing Information**

<p><b>Existing Customer</b>  <input type="text"/></p> <p><b>Existing Contact</b>  <input type="text"/></p> <p><b>Existing Status</b>  <input type="text" value="Confirmed - Deposit Pend."/></p> <p><b>Existing Date</b>  <input type="text" value="Friday, May 3, 2024"/></p>	<p><b>New Event Name</b>  <input type="text" value="Test for user manual - Tasting Event..."/></p> <p><b>New Customer</b>  <input type="text" value=""/> x</p> <p><b>New Status</b>  <input type="text" value="Confirmed - Deposit Pend."/> ▼</p> <p><b>New Event Date</b>  <input type="text" value="5/3/2024"/> <input type="button" value="📅"/> <input type="button" value="🔄 Recurrence"/></p>
--	--

**Filter Departments to Copy**

- Menu
- Beverage
- Equipment
- Staff
- Miscellaneous
- Event Staff

▼

## Changing Event Statuses

To change an event status between prospect, definite, or cancelled, follow the steps below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included* or *Main Sales View*
4. Select the event you want to modify by clicking on the pencil button or double clicking on the event row
5. Select the Event Info Tab, Go to the Event Status
6. Click on the drop down and select the status of the event.
  - a. If the event is moving into a Cancelled status, a pop-up will appear. Please provide additional context for the cancellation.
7. Once you have finished click on *Save*.

**Note:** Depending on your business rules, some Event Status changes may occur automatically. For example, a signed contract might trigger a certain confirmed status.

Event 1043 : Test for user manual : 5/3/2024 : Guest Count : 1  
Edit Event Related Information

Customer **Event Info** Delivery Order Details Financial Billing Changes Lead Details CRM Calendar Email

### Event Information

<b>Event Date / Times</b> Date: 5/3/2024 Start: 09:00 AM End: 05:00 PM Guests: Total 1, Adults 1, Children 0	<b>Status</b> Event Status: Canceled - Too Expensive Add Missing Items/Adjsmts Call Today Canceled - Competition <b>Canceled - Too Expensive</b> Canceled - Weather Confirmed - Deposit Pend. Confirmed - Deposit Rcv'd	<b>Revision</b> 0.0 Notes Letters Timeline Site-Menu
---	---	---

<b>Event Type</b> RECEPTION - COCKTAIL BUFFET Event Name: Test for user manual	<b>Location &amp; Seating</b> Type of Seating: Off Premise Event Location: _Client Office
--	---

Event Files  
History

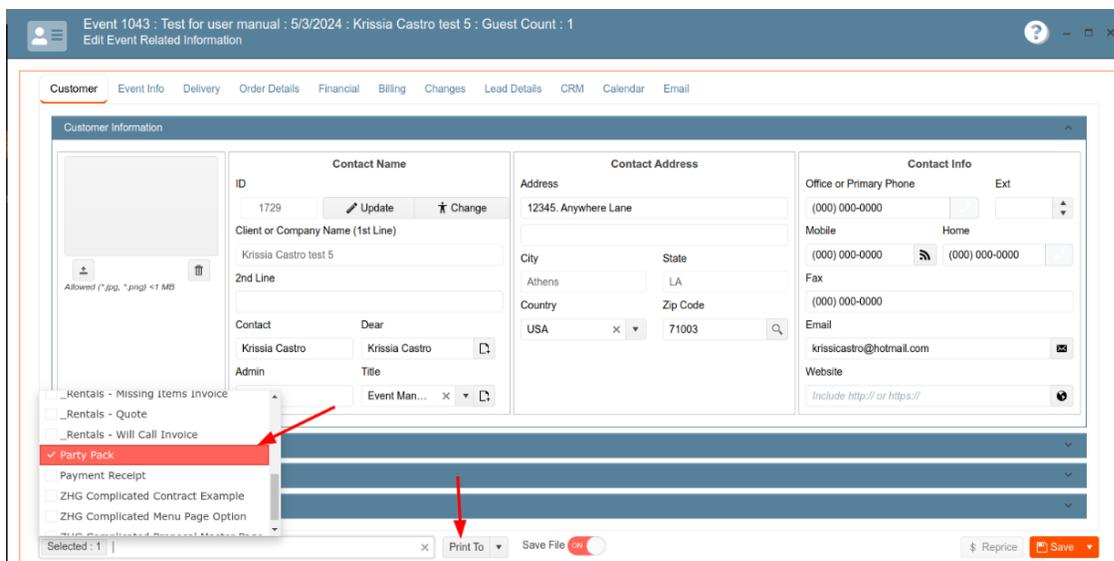
Selected : 0 Select Reports Print To Save File ON Reprice Save

# Key Sales Documents and Reports

## Generate a Party Pack (BEO)

There are several types of reports that can be generated in Elecate. Below are the steps to generate a Party Pack (BEO)

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Look for and check the box *Party Pack*
7. Click on the down arrow next to the *Print to* button and select the desired report
8. Elecate will generate the report.



## Running Batch Reports

Below are the steps to generate reports for more than one event at the same time:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Select all the events
5. Select a Report
6. In the under arrow next to *Print to* button select a format or preview
7. Click on *Print to*

Event Management - All Status Types Included  
Create & Edit Event Orders No Filter

Dates From: 4/2/2024 To: 6/1/2024 Refresh

Selected: 1 Print To New Entry

Selected Records: 3 of 3 (3 Total Records)  Select to Print all Records

\_Analysis Report Budget Batch  
 \_Analysis Report Post Batch  
 \_Catering - Beverage Packing List  
 \_Catering - Invoice  
 \_Catering - Menu Only  
 \_Catering - Menu Packing List  
 \_Catering - Proposal

Co...	E...	Mobile P...	Cu...	Cost C...
Mr Mr		(354) 978-1351	1702	CATERIN
Mr Mr		(354) 978-1351	1702	CATERIN
Mr Mr	test03...	(515) 161-6161	1710	CATERIN

## Event Billing

### Billing

The process of closing out an event will be outlined here

### Entering Discounts

The process for discounting will be outlined here

# Finance & Accounting



## Generating an Invoice

Details to come

## Event Invoice Adjustments

Details to come

## Entering Customer Tax Exempt Information and Certificate

1. Go to *Finance and Accounting*
2. Select *Customer Financials*, then *Customer Financials* again
3. From the menu, select *Customer Financial Management*
4. Choose the customer you would like to edit by selecting the pencil icon or double clicking
5. Go to *Certificates* tab
6. Click the *Add* button
7. Complete the follow fields
  - a. Toggle the *Is Active* switch to ON
  - b. Certificate Number
  - c. Choose a *State*
  - d. Enter the *Effective date* when the certificate is valid
  - e. Upload an attachment by Choosing a file
  - f. At the dropdown choose the *File Type*
8. *Save* or *Save and Close*

## Generating Financial Exports

To generate files to be exported to Great Plains, follow the below process:

1. Go to *Finance and Accounting*
2. Select *Accounting Tools*
3. From the menu, select *Accounting Exports Window*
4. Select an Export Type from the drop-down window
5. Choose the desired date range and click *Refresh*
6. Choose one or a number of events to export
7. Click on the Export button

 Elecate   

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 Quick Lookup >  
 Dashboard (PowerBI)  
 Sales & Marketing >  
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**Accounting Tools**  
 Customer Financials >  
 Financial Reports  
 Commissions & Goals  
 Payroll Processing >  
 Production >

 **Accounting Exports Window**  
 Exports

Export Type: GP Customer x | Dates From: 12/1/2023 | To: 12/13/2024

OFF Export All Pages

	Customernu...	Custome...	Statement...	Addressid	Conta
<input checked="" type="checkbox"/>	10111	Tate, Daryl	The Way Back Penecostal Church	BILLING	Daryl
<input checked="" type="checkbox"/>	11847	Taberna Del Alabardero Inc	Taberna Del Alabardero Inc	BILLING	Rose Amay
<input checked="" type="checkbox"/>	1438	Susan Gage Caterers	Susan Gage Caterers	BILLING	Khoa

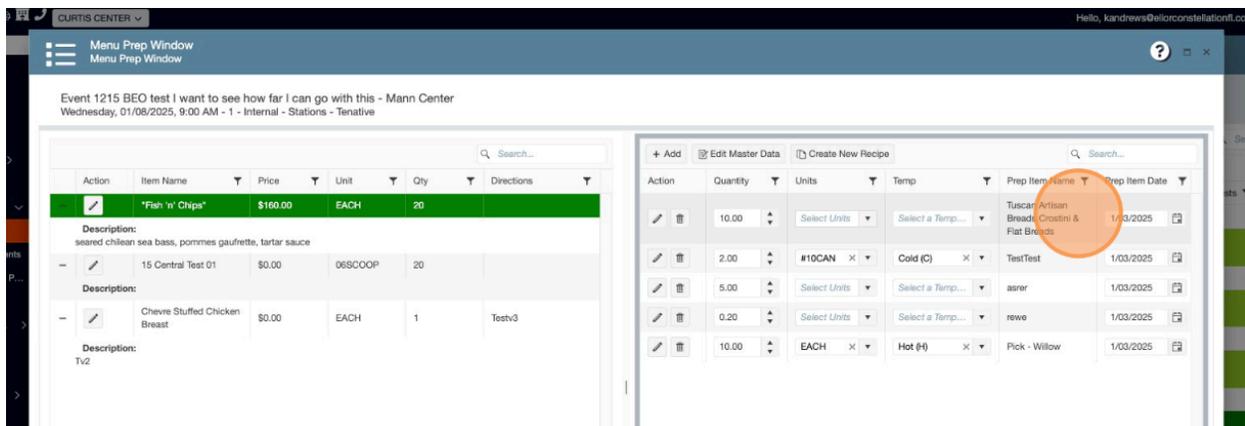
# Production



## Event Level Quantifications

The kitchen production information for all events can be found in the Main Kitchen View. From here, culinary users can adjust prep quantities, set event colors, and update recipes.

1. Select the *Production* section located on the left pannel
2. Select *Kitchen Management*
3. Click on *Main Kitchen View*
4. Double click an event with a *Menu Production* status of *Submitted* to edit
5. Click on the *pencil icon* next to a recipe. This will display the prep items associated with that recipe on the right hand side

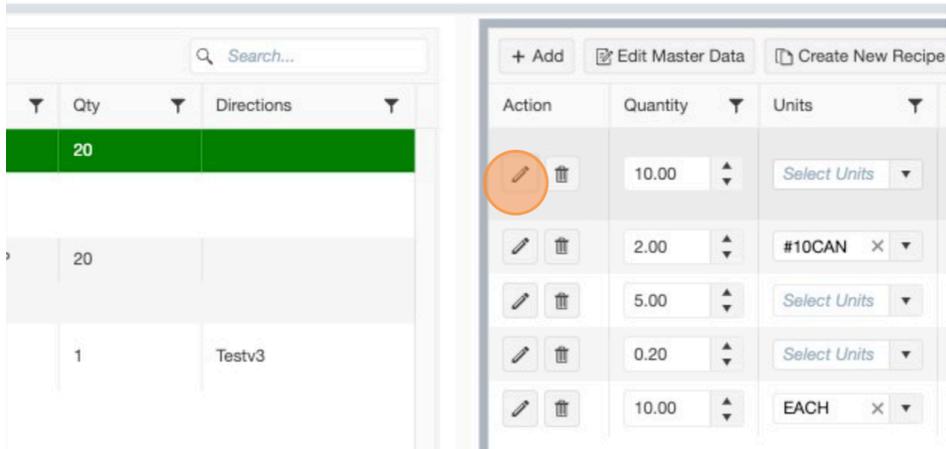


6. Users can make changes to the prep information at the event level only, as follows:
  - a. Add a prep item – use the Add button at the top of the screen
  - b. Remove a prep item- use the trash can icon next to a prep item
  - c. Adjust the quantity, units, temperature or prep date.

*Be sure to save after moving on to the next prep item on the right.*

2. Users can see more information about a prep item by clicking the pencil icon.

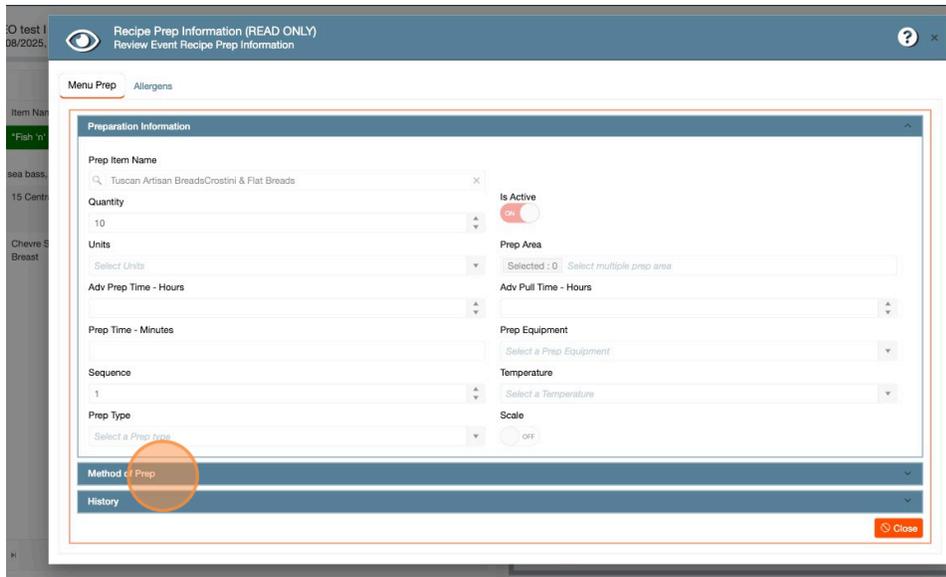
- Mann Center



Qty	Directions
20	
20	
1	Testv3

Action	Quantity	Units
	10.00	Select Units
	2.00	#10CAN
	5.00	Select Units
	0.20	Select Units
	10.00	EACH



Recipe Prep Information (READ ONLY)  
Review Event Recipe Prep information

Menu Prep Allergens

Preparation Information

Prep Item Name: Tuscan Artisan BreadsCrostini & Flat Breads

Quantity: 10

Units: Select Units

Adv Prep Time - Hours: [ ]

Prep Time - Minutes: [ ]

Sequence: 1

Prep Type: Select a Prep type

Is Active:

Prep Area: Selected: 0 Select multiple prep area

Adv Pull Time - Hours: [ ]

Prep Equipment: Select a Prep Equipment

Temperature: Select a Temperature

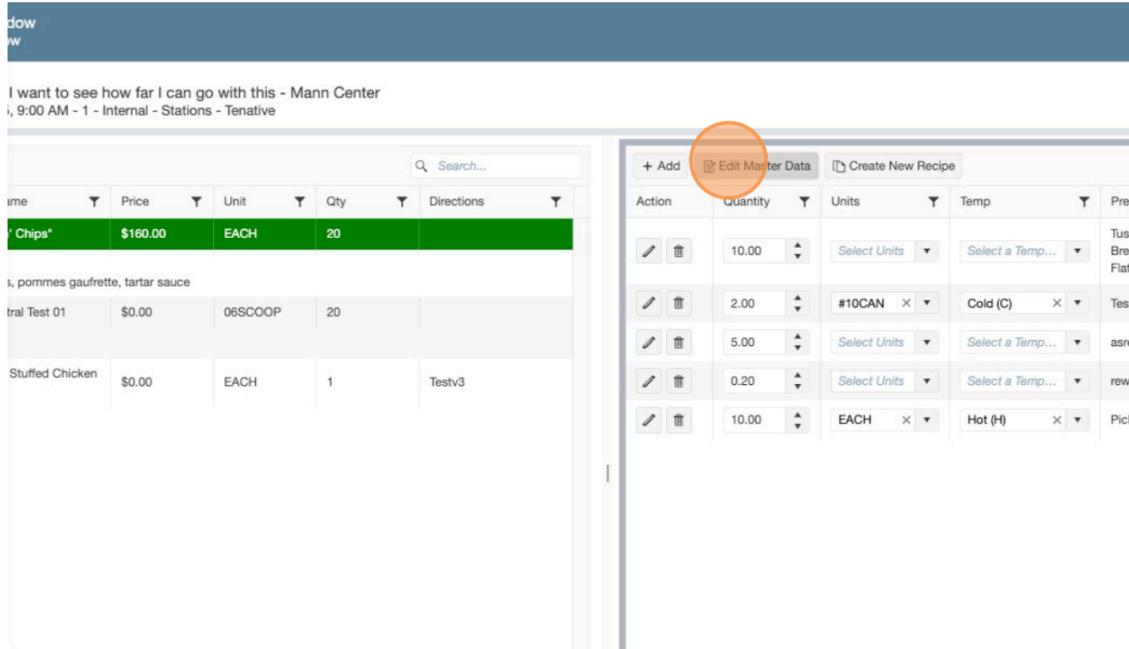
Scale:  on  off

Method of Prep: [ ]

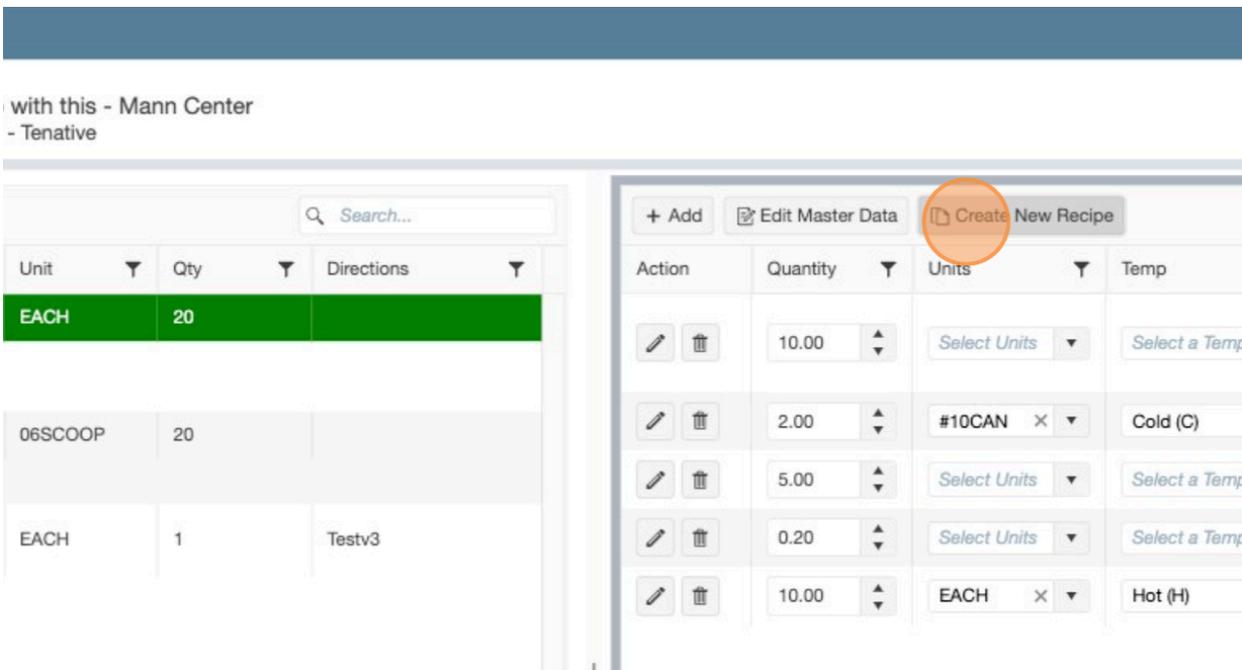
History: [ ]

Close

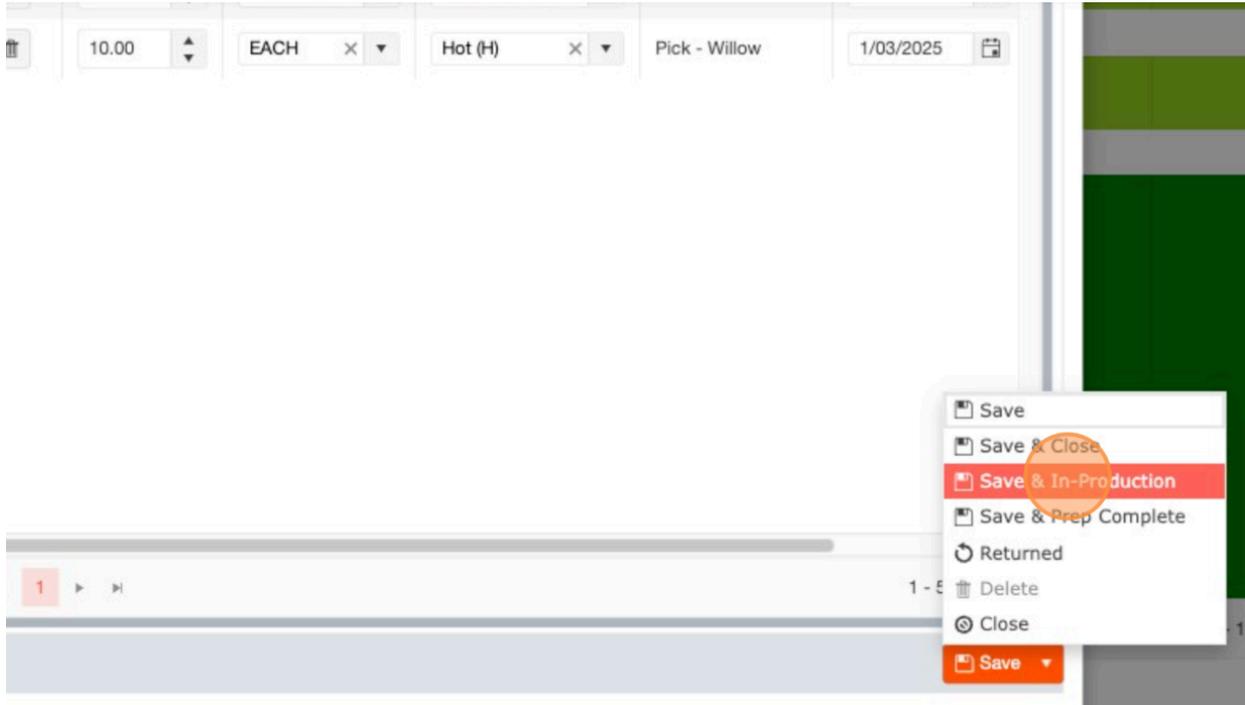
- In addition to event level edits, users can save their quantification changes to the master data item, by making the changes and then clicking *Edit Master Data*



- Users can also create new Recipes after editing the recipe prep and then clicking Create New Recipe.



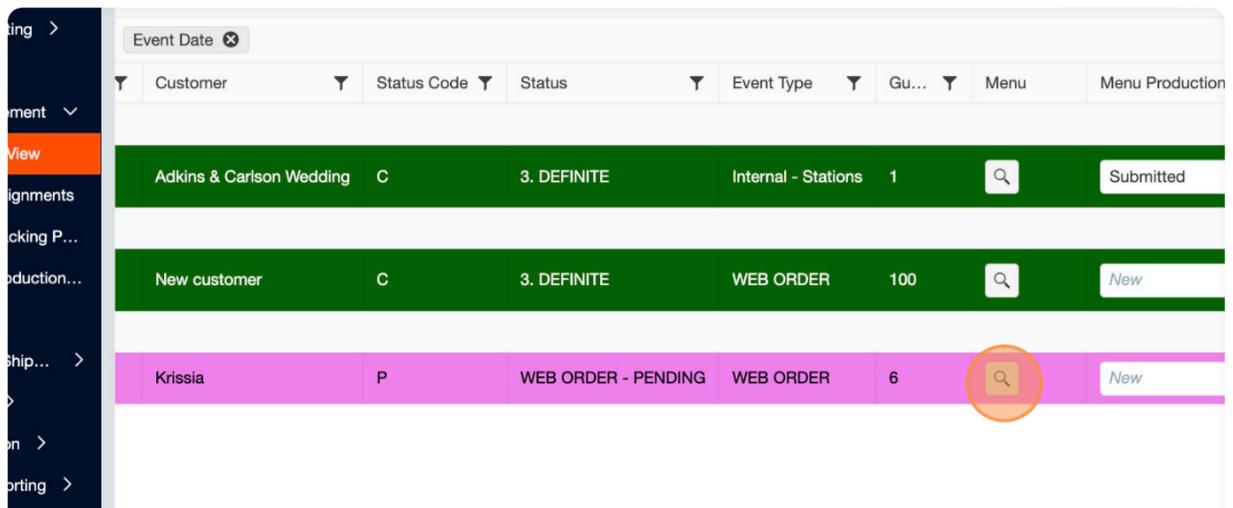
- To save progress while working on the Menu Prep Window, use the *Save & In-Production* option. This will let other users know that prep item adjustments are under way.
- When a user is finished updating an event, use the *Save & Prep Completed* option to indicate that the prep information is finished and production reporting can be run.



## Menu Comparison Window

The Menu Comparison Window allows culinary users to see the changes the sales team made to the master recipe file. To view those changes, follow the steps below:

1. Select the *Production* section located on the left pannel
2. Select *Kitchen Management*
3. Click on *Main Kitchen View*
4. Navigate to the *magnifying glass* next to the event you'd like to view



5. This will open the *Menu Comparison Window*

6. In the yellow, *New Recipe Item Name* column, users will find the modified client facing name

MasterID	Recipe Item Name	New Recipe Item Name	Description	New Description
59	Seasonal Parfait			
59	Seasonal Parfait			
3	Plated Salad - BLT Wedge Salad		baby iceberg lettuce, apple smoked bacon, tomatoes, gorgonzola cheese, caramelized onion sage flatbread	baby iceberg lettuce, apple smoked bacon, tomatoes, gorgonzola cheese, caramelized onion sage flatbread
60	Kale Caesar Salad			
11	Plated Salad - Grilled Pear Salad VEG		field greens, pearl mozzarella, tomatoes, root vegetable caponata, sunflower seeds, chickpea flatbread, balsamic syrup	field greens, pearl mozzarella, tomatoes, root vegetable caponata, sunflower seeds, chickpea flatbread, balsamic syrup
5	Plated Beef - Tomato Anise Braised Beef Osso Bucco	Tomato Anise Braised Beef Osso Bucco	wood-grilled polenta, roasted brussels sprouts & okra, basil pesto	wood-grilled polenta, roasted brussels sprouts & okra, basil pesto
59	Seasonal Parfait			
3	Plated Salad - BLT Wedge Salad		baby iceberg lettuce, apple smoked bacon, tomatoes, gorgonzola cheese, caramelized onion sage flatbread	baby iceberg lettuce, apple smoked bacon, tomatoes, gorgonzola cheese, caramelized onion sage flatbread
60	Kale Caesar Salad			

7. In the *New Description* column, users will find the modified client description

8. In the *Production Notes* column, relevant kitchen notes from the sales team can be found

wer Palace, 1/13/2025 - 12:00:00 to 12:30:00, WEB ORDER - 6.0 Guests

New Temp	Price	New Price	Unit	New Unit	Production Notes
	25	25	EACH	EACH	
	15	15	EACH	EACH	
	36	36	EACH	EACH	
	60	60	EACH	EACH	
	36	36	EACH	EACH	
	240	240	EACH	EACH	Write the change here
	15	15	EACH	EACH	

9. After reviewing, click the *close* button

## Accepting Change Requests

If a sales user needs to make one or two changes to their menu after they have submitted it to the kitchen, they may submit a change request. To review, accept or reject change requests, follow the steps below:

1. Select the *Production* section located on the left pannel
2. Select *Kitchen Management*
3. Click on *Main Kitchen View*
4. Any new change request will appear in a large pop up

## Returning Orders

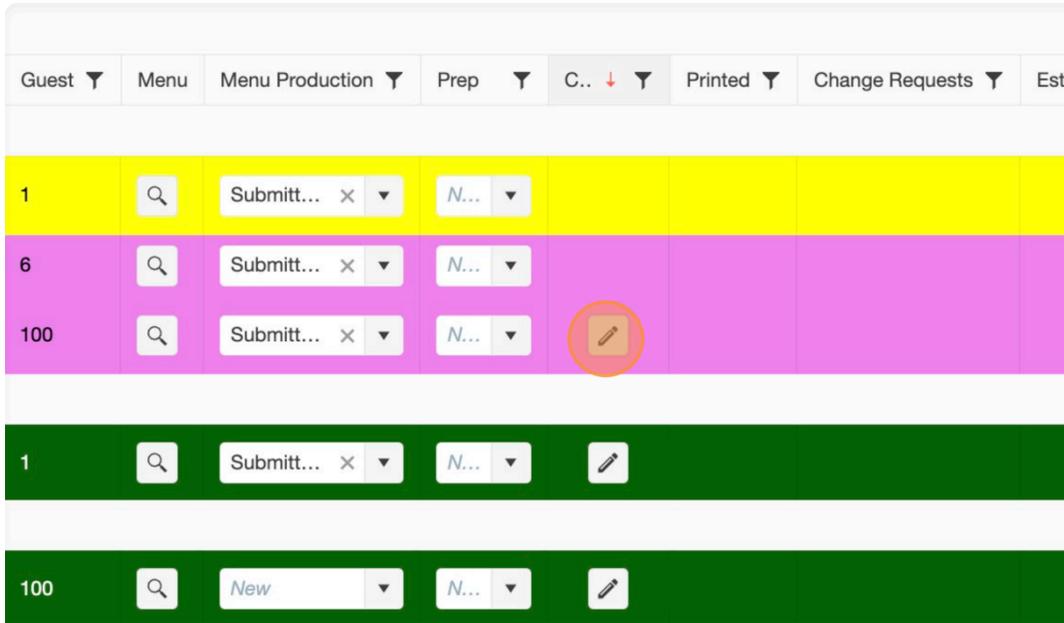
If a sales user needs to make more than one or two changes to their menu, they may ask the kitchen to put the order into Returned status. This will allow them to edit the order without completing multiple change requests. To do so, follow the below steps:

1. Select the *Production* section located on the left pannel
2. Select *Kitchen Management*
3. Click on *Main Kitchen View*
4. *Users can either:*
  - a. Click on the *Pencil* next to the event; Navigate to the *Save drop down* and select *Returned*
  - b. Change the *menu production* status to *Returned* from the *Main Kitchen View* window

## Assigning Event Colors

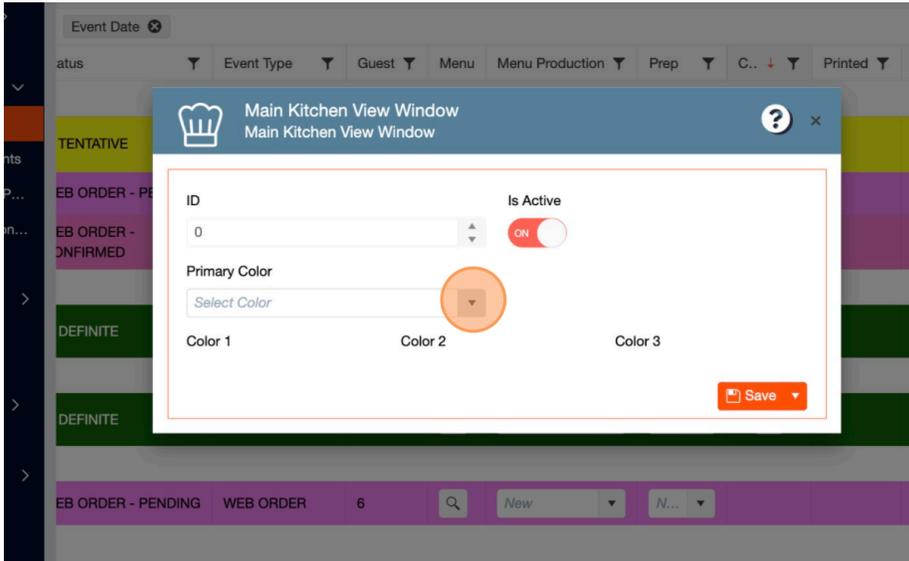
For businesses that use a visual, color code for their events, these colors can be assigned by following the below steps:

1. Select the *Production* section located on the left pannel
2. Select *Kitchen Management*
3. Click on *Main Kitchen View*
4. Navigate to the *Colors* column. When the event is in confirmed status, the *Pencil icon* appears in this column. Click the pencil to open the color selection window.

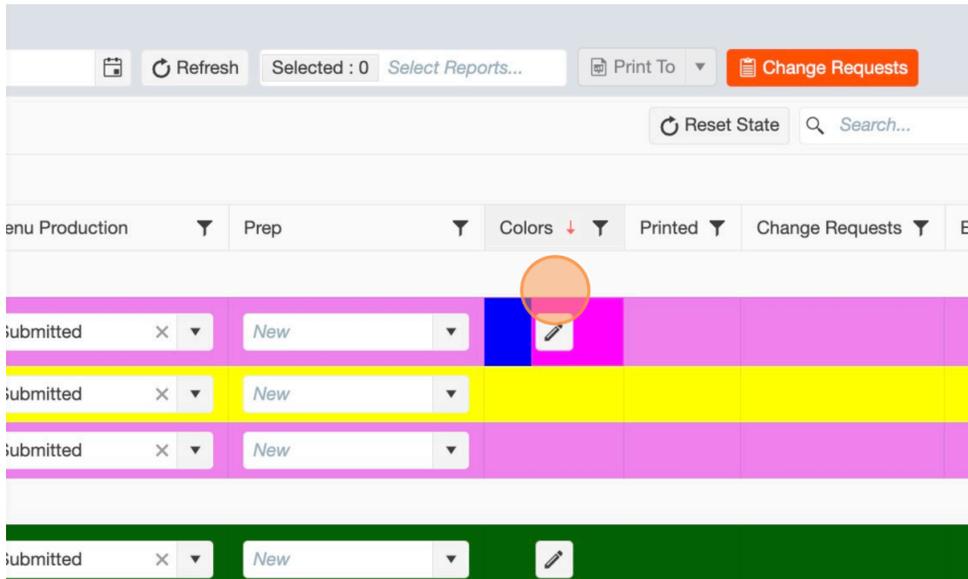


5. Click the *Primary Color* drop down to select from the available color combinations, demonstrated as the first initials of the colors. Colors that are already in use within a given period of time will be grayed out so that they cannot be reused.

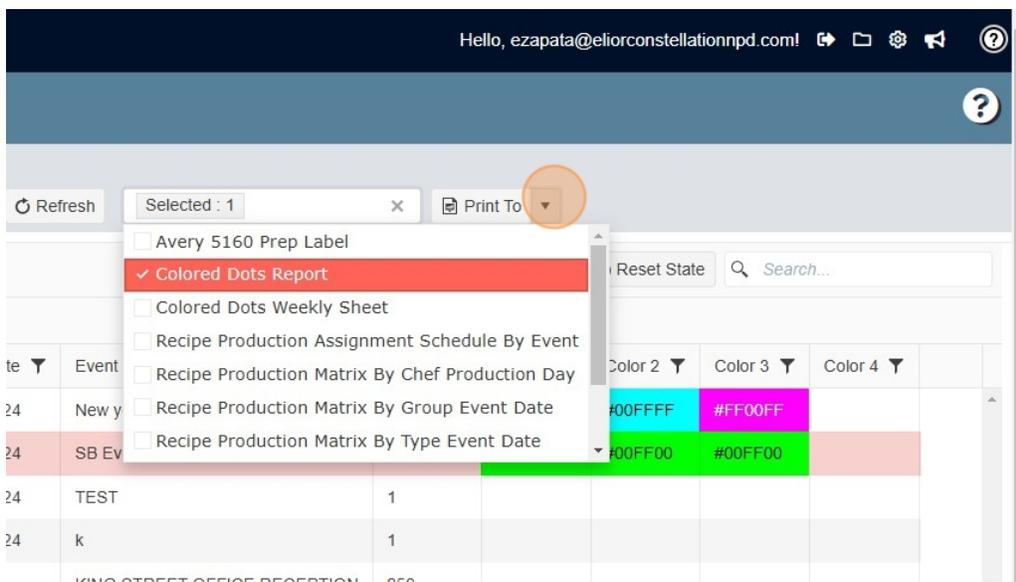
*Tip:* The rules for color combination re-use can be set via app settings.



6. After saving, the colors selected will appear on the event line item.



- Once colors have been assigned, users can generate the "Colored Dots Report". This report is run on the *Main Kitchen View*

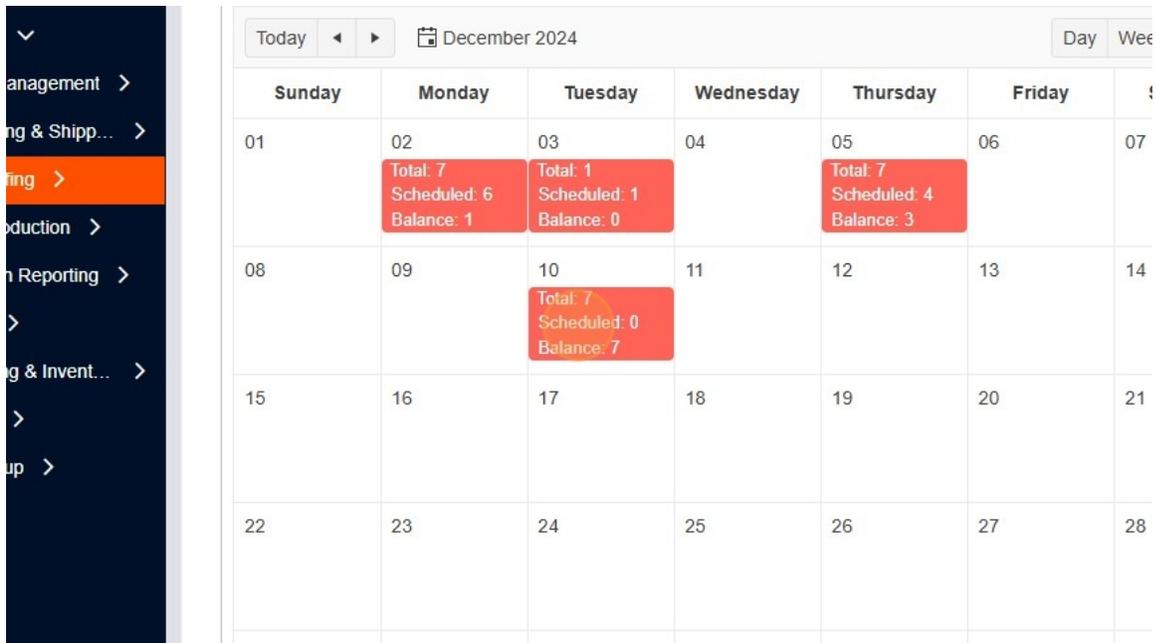


# Event Staffing

## Batch Worker Assignments

To assign several staff members to skill types at once, follow the below instructions for batch assignment:

1. Select the *Production* section located on the left pannel
2. Select *Event Staffing*
3. Click on *Staff Production Scheduling in the window*
4. From the calender, click on the orange square indicating that a date contains events with staff requests
5. The side panel *select events/skill types* will appear, showing events with cooresponding staffing requests



The screenshot shows a calendar interface for December 2024. The calendar grid has columns for days of the week (Sunday to Saturday) and rows for dates (01 to 28). Overlaid on the calendar are red boxes containing staffing data for specific dates:

- Monday, 02: Total: 7, Scheduled: 6, Balance: 1
- Tuesday, 03: Total: 1, Scheduled: 1, Balance: 0
- Thursday, 05: Total: 7, Scheduled: 4, Balance: 3
- Tuesday, 10: Total: 7, Scheduled: 0, Balance: 7

8. Users will see the events with staff requests on that date. Below the Event ID and location, a list of requested skill types, the total quantity of that skill requested followed by a slash and the number assigned so far.

Quick Glance Service Group

Event Date

Staff

Day Week **Month**

Monday	Thursday	Friday	Saturday
	05 Total: 7 Scheduled: 4 Balance: 3	06	07
	12	13	14

Select Events / Skill Types

By Event

- 12/10/2024
  - 1170\_Client Residence
    - BARTENDER1 2/0
    - CAPTAIN 1/0
    - CHEF 1/0
    - Doorman 1/0
  - 1211\_Client Office
    - BARTENDER1 1/0
    - CHEF 1/0

9. Navigate to the *Refresh* button on the left side panel titled *Event Requirements*. This will bring up all of the staff members that could be assigned to this event.

Returns >

Purchasing & Inventory >

Data Items >

General Setup >

Assign selected Staff

Hours Refresh

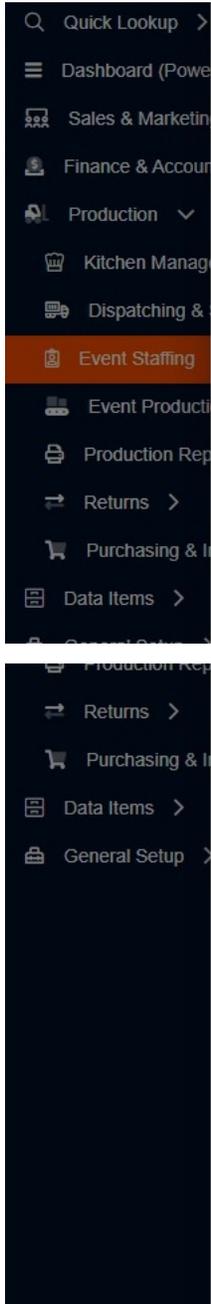
Batch Change New Select A Report...

Search...

<input type="checkbox"/>	Action	Skill
<input type="checkbox"/>		BARTENDER1
<input type="checkbox"/>		BARTENDER1
<input type="checkbox"/>		CAPTAIN
<input type="checkbox"/>		CHEF
<input type="checkbox"/>		Doorman

1

10. Users can now check the boxes next to the staff members they would like to assign to the event, by skill type.



OFF All Skills (No Filter) OFF Web Responses OFF Exclude Agencies Selected : 0

### Event Requirements

Enter search text...

- Event ID: 1170
  - BARTENDER1
    - Aguilar, Ana
    - Alejo, Josue
    - Orellana, Marian
  - CAPTAIN
    - Alejo, Josue
    - Andrews, Kristin
    - Bagnall, Patrick
    - Connole, Suzanne
    - Dunn, Earnie
    - Marsh, Chris
    - Meadows, Dave
    - Monahan, Patricia
    - Stanley, Steven Mich
    - Test, Josue
    - Test, Sup
    - Zapata, Elias
  - Doorman
    - Christian, Frank
    - Hefter, Amy
    - Test, Sup

**Assign selected Staff**

Hours Refresh

### Staff Assign

#### Event Details

Event ID # **1170** on Tuesday, December, 10, 02024  
From **5:00 AM - 11:00 PM** for **100**  
Merry Christmas  
**007 Productions** 2121111111  
Budget Cost of **\$916.00** and Revenue of **\$1,748.00**

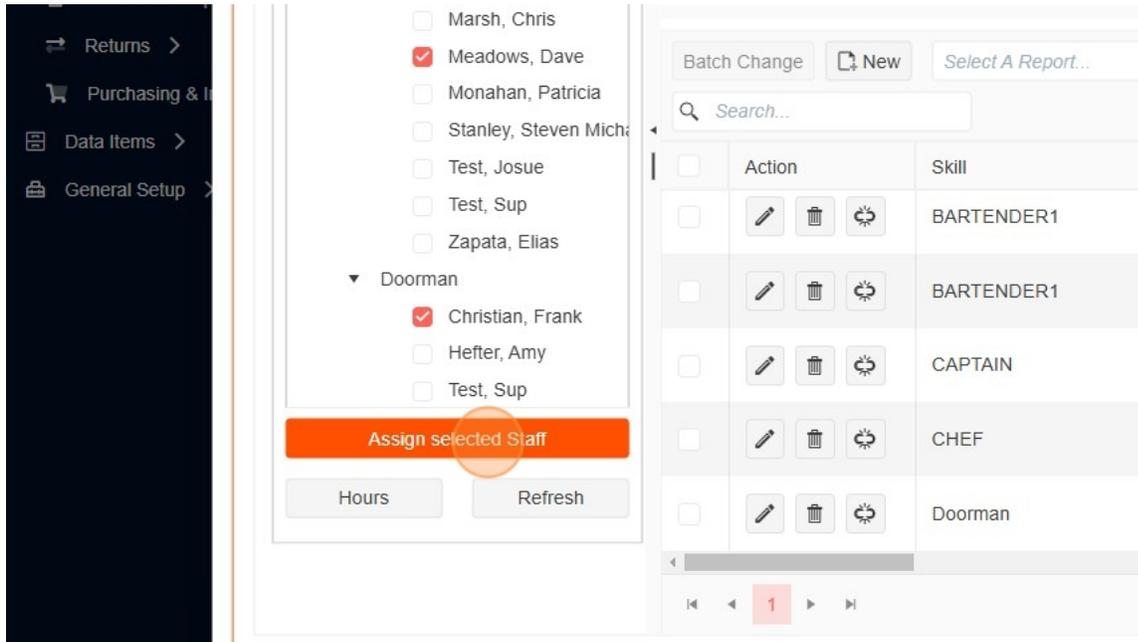
Batch Change New Select A Report...

Search...

<input type="checkbox"/>	Action	Skill
<input type="checkbox"/>	<input type="checkbox"/>	BARTENDER1
<input type="checkbox"/>	<input type="checkbox"/>	BARTENDER1
<input type="checkbox"/>	<input type="checkbox"/>	CAPTAIN
<input type="checkbox"/>	<input type="checkbox"/>	CHEF
<input type="checkbox"/>	<input type="checkbox"/>	Doorman

1

11. Finally, click the *Assign Selected Staff* button to assign workers to the event



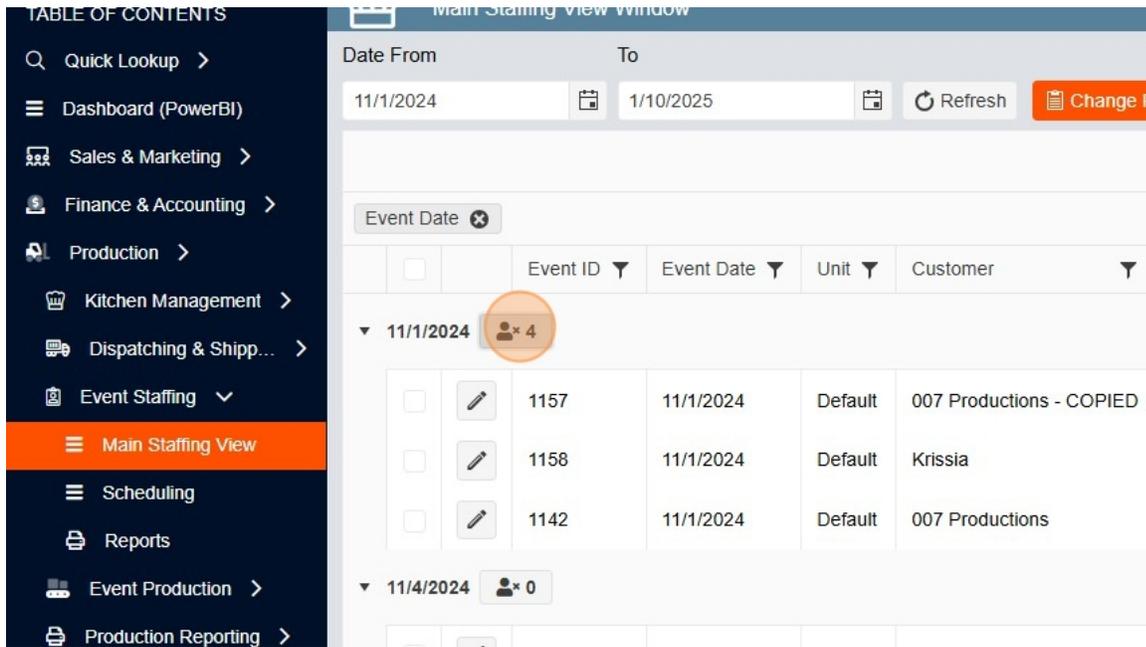
## Event Worker Shift History

Add instructions on event worker shift history report

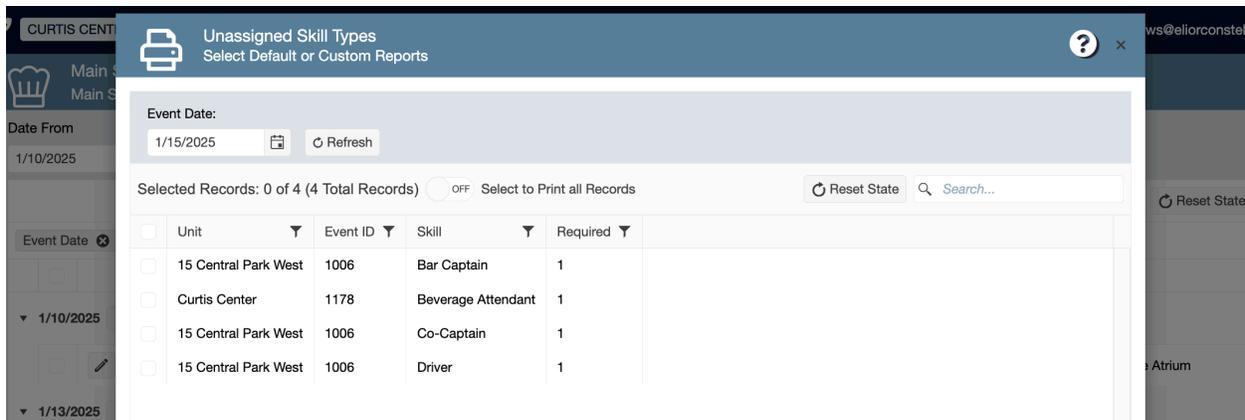
## Quick Search Feature – Find Unfilled Positions

Using this guide, you can find unfilled/open positions quickly.

1. Select the *Production* located on the left pannel
2. Select *Event Staffing*
3. Click on *Main Staffing View*
4. Choose the date range you need and click *Refresh*
5. Next to each date, an icon with a person x a number will be shown. This represents the unfilled positions for that date. Clicking that icon will open the unassigned skill types window.



6. This window shows the event ID, skill type and quantity waiting to be filled



## Assigning Ratings as a Staffing Administrator

The staffing department can assign skill type ratings for staff members. These ratings can be used to quickly filter for staff of a certain rating when assigning staff to events.

1. Click on *Data Items* in the side panel
2. Click on *HR Management*
3. Click on *HR Management All Staff*
4. Select a staff member and navigate to the *Profile* tab
5. Under Training, Status, Availability, click on the arrow for *Skill Level*

Staff Note (limit of 140 characters)

Training, Status, Availability

Security Clearance: *Select Security Clearance* ▼

Training Courses: *Select Training Course* ▼

Training Date: M/d/yyyy 

Skill Level: *Select Skill Level* ▼

Times Available: *Enter available times*

Eligible for Mileage Reimbursement:  NO

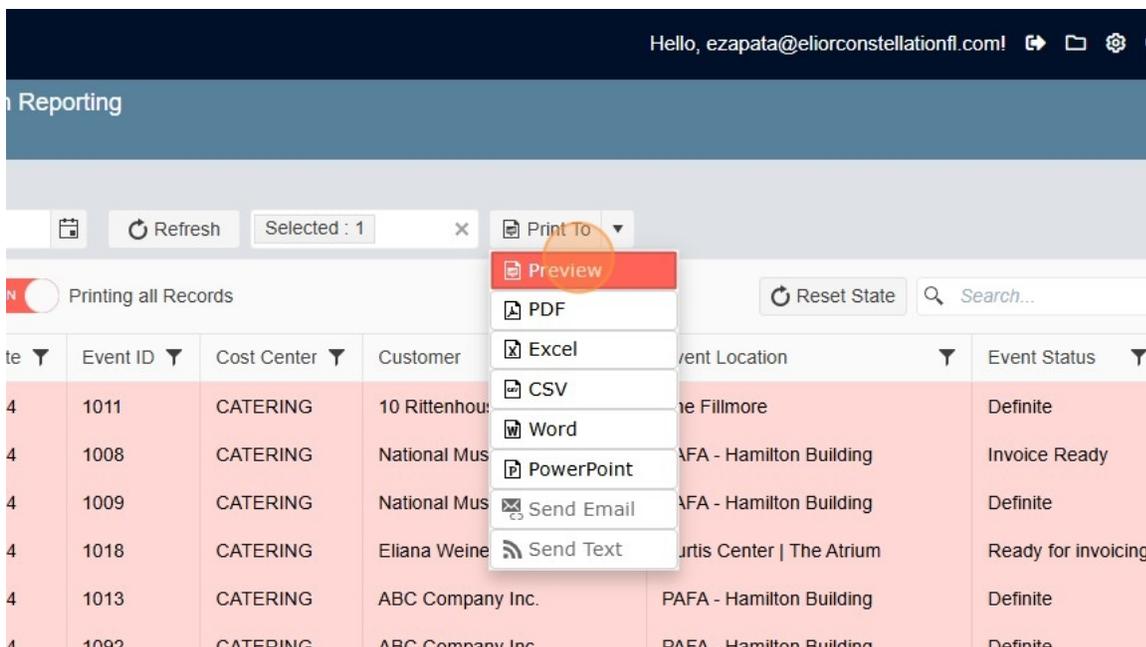
Email: support03@elecate

6. Choose a rating for this skill
7. Click *Save & Close*

# Key Production Reporting

## Cumulative Prep Items Reports

1. Select the *Production* section located on the left pannel
2. Select *Kitchen Management*
3. Click on *Reports* and the *Food Production and Scheduling Reporting* window appears
4. Look for *the* desired date range and click *Refresh*
5. Select the desired report
6. Click on *Refresh*
7. Select the events for which you need the report
8. In the *Print to* down arrow, you can preview the report, or select the desired format for downloading
9. Elecate will generate the report using the selected format.



## Production Reports

1. Select the *Production* section located on the left pannel
2. Select *Production Reporting*
3. Click on *Production Reports* and the *Production Reporting* window appears
4. Look for *the* desired report and click on it
5. Choose a date range
6. Select the desired report
7. Click on *Refresh*
8. Select the event from which you need the report

9. In the *Print to* down arrow, you can preview the report, or select the desired format for downloading
10. Elecate will generate the report using the selected format.

Equipment Requirements Reporting by Delivery Dates  
Select Default or Custom Reports

Delivery Date From: 1/2/2023 To: 5/25/2024 Refresh Selected: 1 X

Selected Records: 0 of 2 (2 Total Records) OFF Select to Print all Records Search...

Equip ID	Item Name	Description	Quan...	Group	Equip Location	Event ID	Costcen...	Status	Event Date
13030	ANTIQUE GOLD IRIDESCENT SATIN 120" ROUND CLOTH		10	IRIDESCENT SATIN	Warehouse	1001	CATERING	C	12/25/2023
11501	BENGALINE BURGUNDY TABLE RUNNER		2	ORGANZA	A Warehouse	1001	CATERING	C	12/25/2023

## Staff Management Reports

Using the *Staff Management Report* users can print a list of staff members and their associated skill types.

1. Click on *Data Items* in the side panel
2. Click on *HR Management*
3. Access to *Reports*
4. Click on *Staff Management Reports*
5. Select *Staff Detail Skill Type List*
6. Click on *Refresh*
7. Click on the down arrow next to the *Print to* button and select the preferred format
8. Elecate will generate the report.

Staff Management Reports  
Select Default or Custom Reports

Refresh Selected: 1 X Print To

Selected Records: 1 of 3 (3 Total Records) Print all Records Search...

Web E...	Ed...	Edit ...	Auto ...	St...	City	Depar...	E...	Empl...	Security Clearance	Skill Le...	Staff ...	State	Tr...	Work S...
<input checked="" type="checkbox"/>	False	4/15/202	0	509	Westc...		jeangr...		All		Gray, Jean	NY	Advan...	A
<input type="checkbox"/>	False	test001 4/22/202	0	513	Houston		javiert...				Test, Javier	TX		A
<input type="checkbox"/>	False	4/25/202	0	515	Shrev...		ssum...				Summers, Scott	LA		A

# Data Items



# Food Management

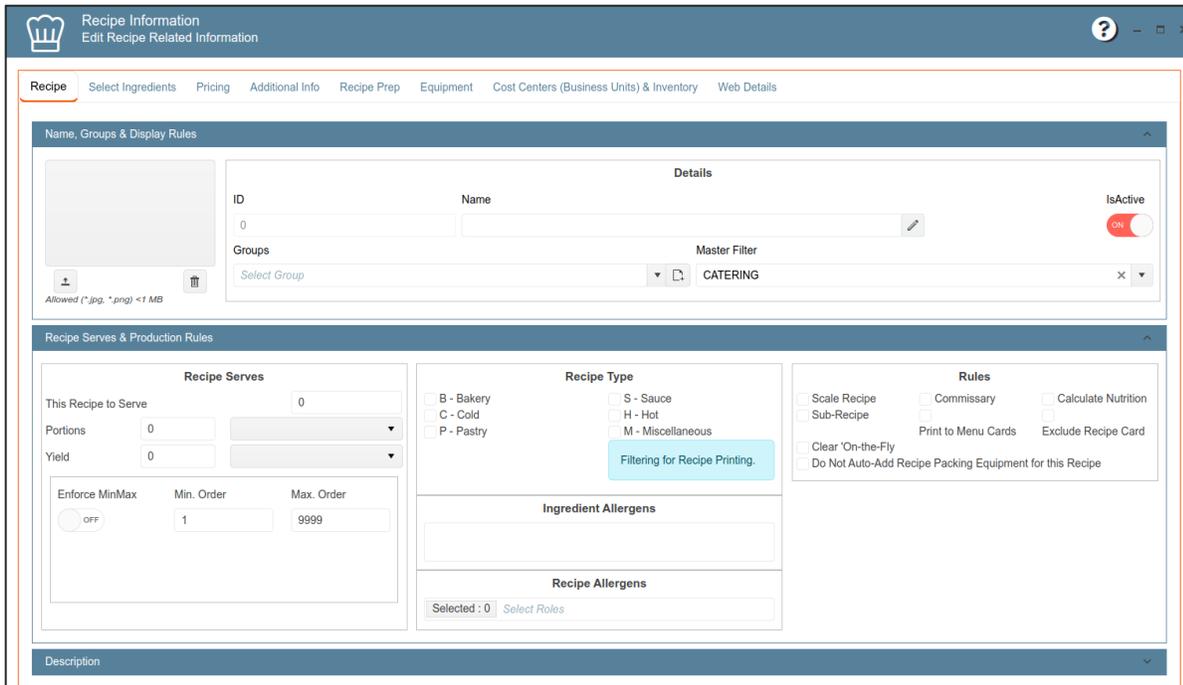
In the food management section, you can make changes to your recipes, ingredients, and menus.

## Adding Recipes

In this section you can create recipes that can be used across events.

1. Click on the *Data Items* section located on the left pannel
2. Select *Food Management*. The *Food Department* window appears
3. Click on *Production Reports* and the *Production Reporting* window appears
4. From the menu, select *Recipe Management (All Items)*
5. Click on *New Entry*
4. The recipe information window will pop up, from there you can:
  - a. Name the recipe\*
  - b. Select a *Group* for the recipe\*
  - c. Assign a *Master Filter*\*
  - d. Set the *Portions*\*
  - e. Set the *Yield*\*
6. Click on *Save*.

\* All these fields are required to save changes successfully.



The screenshot shows the 'Recipe Information' form. The top navigation bar includes tabs for 'Recipe', 'Select Ingredients', 'Pricing', 'Additional Info', 'Recipe Prep', 'Equipment', 'Cost Centers (Business Units) & Inventory', and 'Web Details'. The main form is divided into several sections:

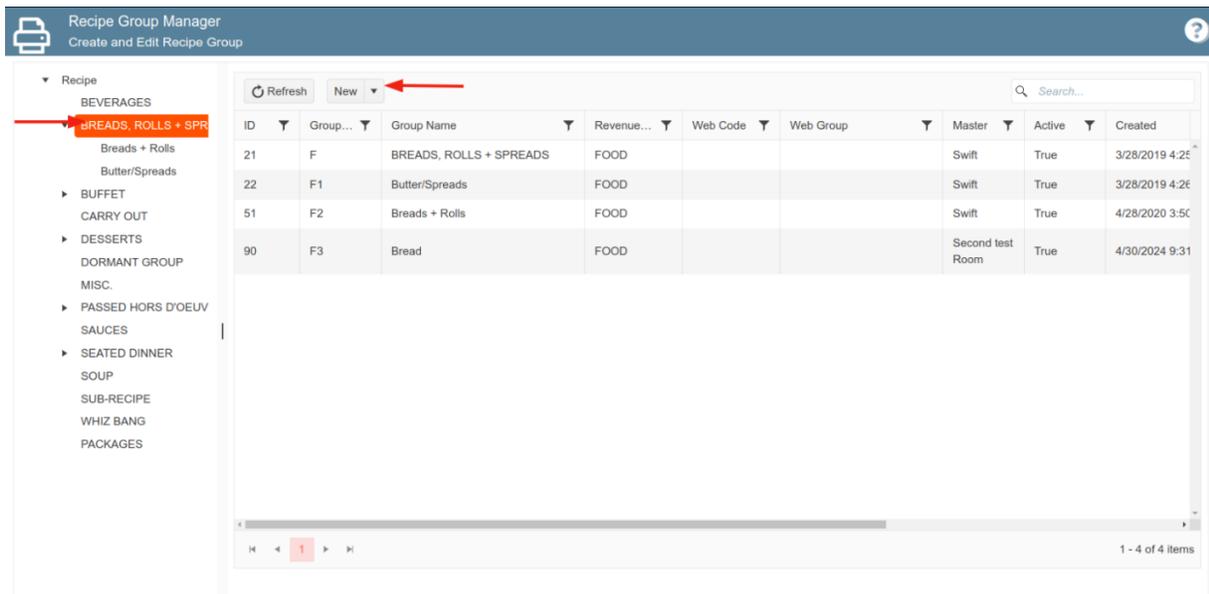
- Name, Groups & Display Rules:** Contains fields for 'ID' (value: 0), 'Name', 'Groups' (dropdown: 'Select Group'), 'Master Filter' (dropdown: 'CATERING'), and 'IsActive' (toggle: ON).
- Recipe Serves & Production Rules:**
  - Recipe Serves:** 'This Recipe to Serve' (0), 'Portions' (0), 'Yield' (0).
  - Recipe Type:** Radio buttons for 'B - Bakery', 'C - Cold', 'P - Pastry', 'S - Sauce', 'H - Hot', 'M - Miscellaneous'. A blue button says 'Filtering for Recipe Printing'.
  - Rules:** Checkboxes for 'Scale Recipe', 'Sub-Recipe', 'Commissary', 'Print to Menu Cards', 'Calculate Nutrition', 'Exclude Recipe Card', 'Clear 'On-the-Fly', 'Do Not Auto-Add Recipe Packing Equipment for this Recipe'.
  - Enforce MinMax:** 'Enforce MinMax' (OFF), 'Min. Order' (1), 'Max. Order' (9999).
  - Allergens:** 'Ingredient Allergens' and 'Recipe Allergens' (Selected: 0, Select Roles).
- Description:** A text area at the bottom.

## Adding Prep Items to Recipes

Details to come

## Creating Recipe Groups

1. Click on the *Data Items* section located on the left pannel
2. Select *Food Management* and the *Food Department* window appears
3. From the menu, select *Recipe Group Management*
4. Select the main recipe category
5. Click on *New*

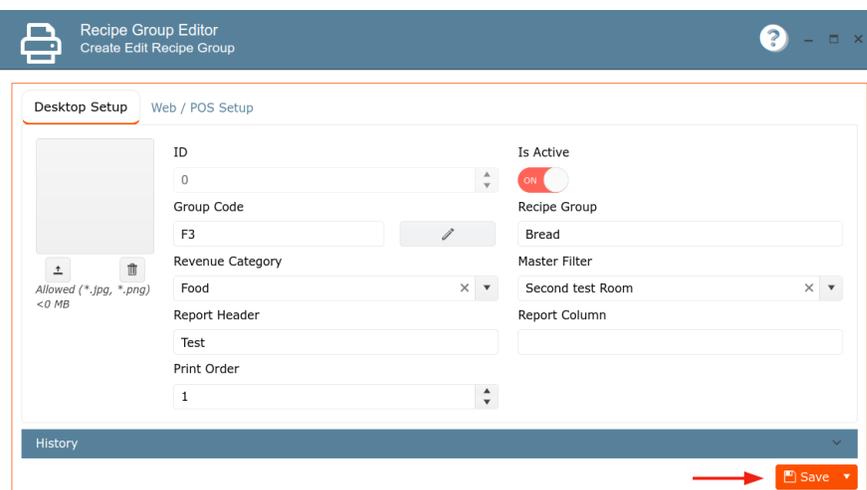


Recipe Group Manager  
Create and Edit Recipe Group

Refresh New

ID	Group...	Group Name	Revenue...	Web Code	Web Group	Master	Active	Created
21	F	BREADS, ROLLS + SPREADS	FOOD			Swift	True	3/28/2019 4:25
22	F1	Butter/Spreads	FOOD			Swift	True	3/28/2019 4:26
51	F2	Breads + Rolls	FOOD			Swift	True	4/28/2020 3:50
90	F3	Bread	FOOD			Second test Room	True	4/30/2024 9:31

1 - 4 of 4 items



Recipe Group Editor  
Create Edit Recipe Group

Desktop Setup Web / POS Setup

ID: 0

Group Code: F3

Revenue Category: Food

Report Header: Test

Print Order: 1

Is Active: ON

Recipe Group: Bread

Master Filter: Second test Room

Report Column:

History

Save

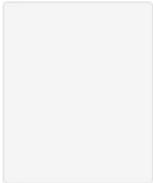
6. The *Recipe Group Editor* will pop-up, from there you can enter/update all necessary information
7. Once you're done, click save.

## Creating a Menu Package

1. Click on the *Data Items* section located on the left panel
2. Click on *Food Management*
3. Click on *Menu Packages* in the list of windows
4. Click on the *New Entry* button
5. In the dropdown click on *Event Type* option
6. In the dropdown click on *Menu Group* option
7. Click on the *Recipes Components* tab
8. Click on *Save & Close*

Name, Groups & Display Rules

### Recipe Item



Allowed (\*.jpg, \*.png)  
<5 MB

ID:

Menu Name:

Event Type: Select Event Type

- Afternoon Tea
- Afternoon Tea - 2022
- All Events
- atering - Staffing Only - 2022
- Baby Shower
- Baby Shower - 2022
- Breakfast

Is Active:

Master Filter: Ezq Cost Center

Revenue Code: Food

Menu Breakdown		Financial Recap & Calculator	
Number of Guests	Minimum Order Quantity	Total Price	Per Guest Price



Allowed (\*.jpg, \*.png)  
MB

ID:

Menu Name:

Event Type: Select Event Type

Menu Group: Select Menu Group

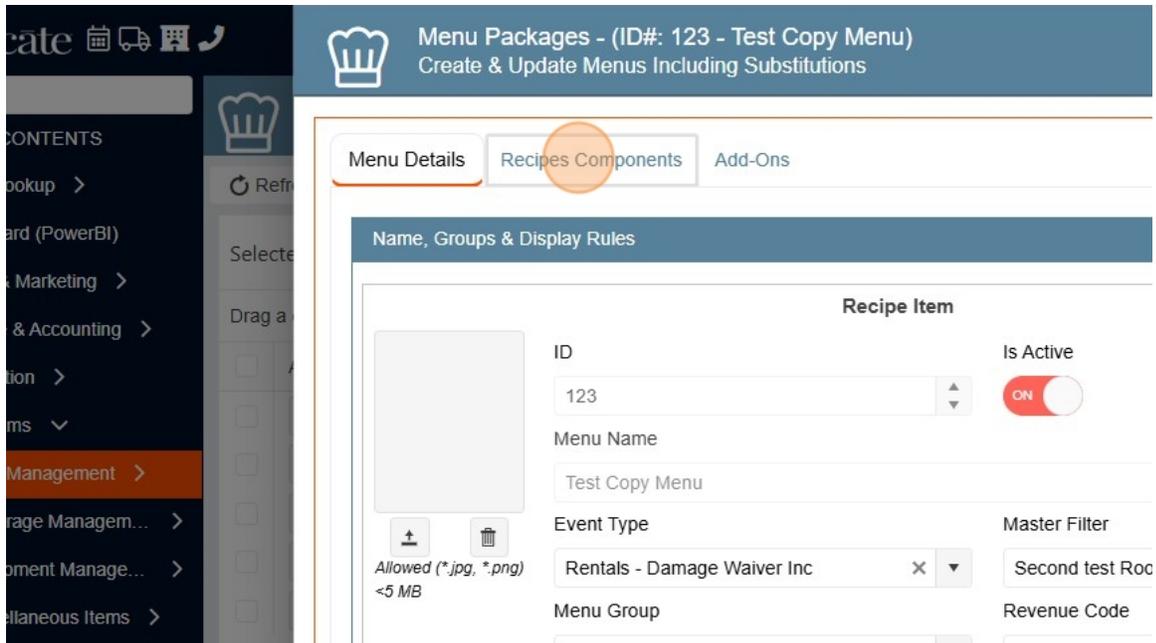
- SEEFood

Is Active:

Master Filter: Ezq Cost Center

Revenue Code: Food

Menu Breakdown		Financial Recap & Calculator	
Number of Guests	Minimum Order Quantity	Total Price	Per Guest Price
1		Package \$0.00	\$0.00
Web Enabled Item	Children's menu	Cost Percent .00 %	.00 %



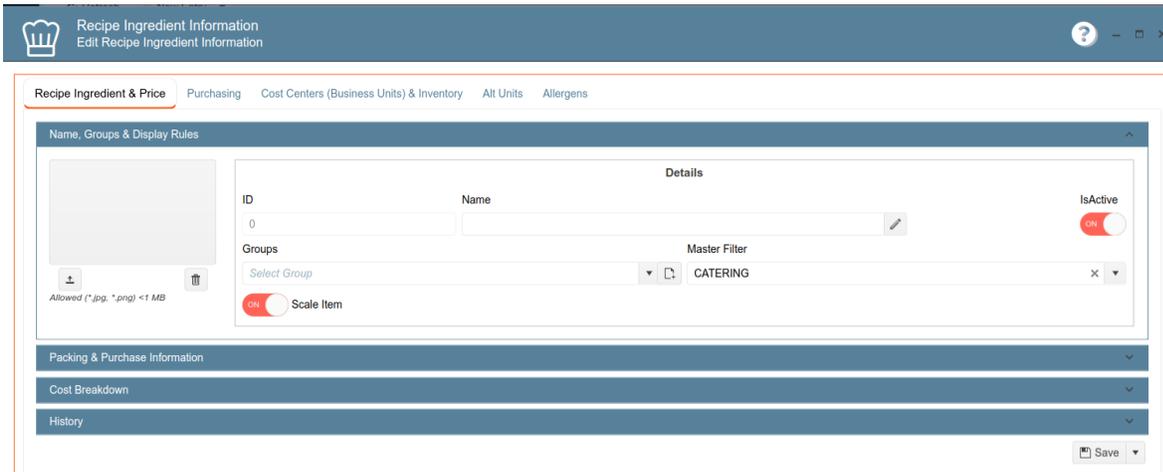
Details on Recipe Package Toggles to be added

## Deactivating Recipes

1. Click on *Data Items* in the side pane
2. Select *Food Management*
3. Click on *Recipe Management (All Items)*
4. Select the recipe you want to deactivate by clicking on the pencil icon or by double clicking on it
5. Turn off the *Is Active* switch
6. Click on *Save*.

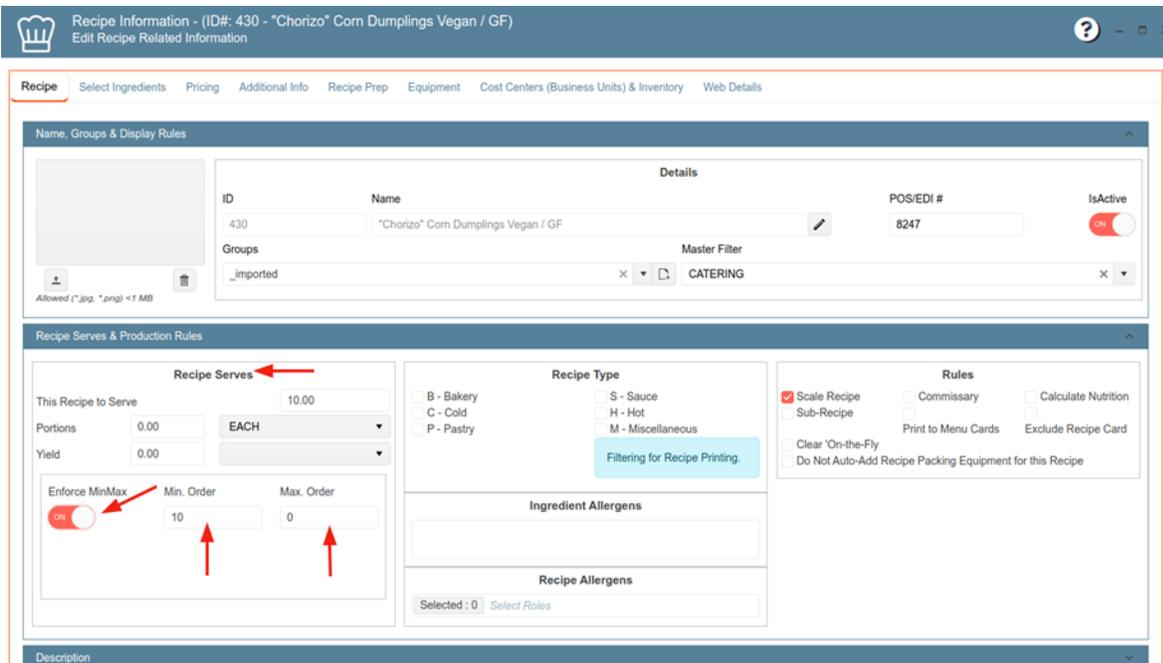
## Adding a New Ingredient

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Ingredient Management (All Items)*
4. Click on the *New Entry* button
5. A pop-up window will appear
6. Name the ingredient\*
7. Assign the group\*
8. Once you enter all the required data click on *Save*.



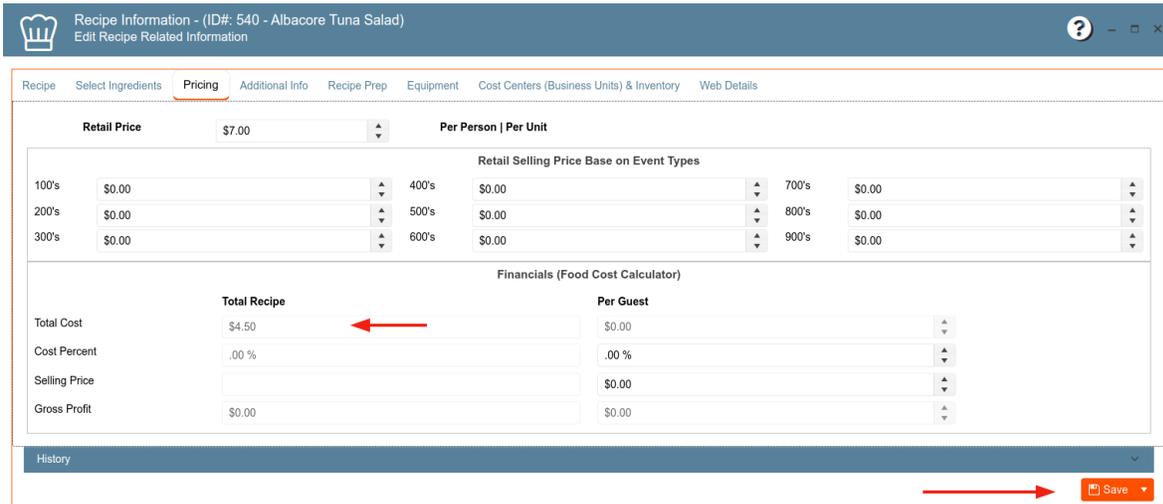
## Setting Recipe Minimums and Maximums

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Management (All Items)*
4. Select the recipe you want
5. In the Recipe Serves part turn on the switch name *Enforce Minmax*
6. Set the Min Order and Max Order
7. Once you Made all the changes click on *Save*.



## Updating Costs and Prices

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Management (All Items)*
4. Click on the item you want to update
5. In the Pricing tab locate Total Cost
6. Change the cost
7. Click Save



Recipe Information - (ID#: 540 - Albacore Tuna Salad)  
Edit Recipe Related Information

Recipe Select Ingredients **Pricing** Additional Info Recipe Prep Equipment Cost Centers (Business Units) & Inventory Web Details

Retail Price \$7.00 Per Person | Per Unit

Retail Selling Price Base on Event Types

100's	\$0.00	400's	\$0.00	700's	\$0.00
200's	\$0.00	500's	\$0.00	800's	\$0.00
300's	\$0.00	600's	\$0.00	900's	\$0.00

Financials (Food Cost Calculator)

Total Recipe		Per Guest	
Total Cost	\$4.50	Total Cost	\$0.00
Cost Percent	.00 %	Cost Percent	.00 %
Selling Price		Selling Price	\$0.00
Gross Profit	\$0.00	Gross Profit	\$0.00

History

Save

**Important:** The same procedure applies to drinks, equipment, and miscellaneous items.

## Costing Recipes at the Recipe Item Level

Rather than summing the total cost of ingredients that make up a recipe, users are able to bypass that step and still input a total cost.

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Management (All Items)*
4. Click on the item you want to update
5. Navigate to the *Pricing Tab*
6. Switch the toggle next to the *Total Cost* line to the *on* position. This will make the *Total Cost* field editable, and adds a placeholder ingredient to do so.

**Retail Selling Price Base on Event Types**

0.00	▲▼	400's	\$0.00	▲▼	700's	\$0.00
0.00	▲▼	500's	\$0.00	▲▼	800's	\$0.00
0.00	▲▼	600's	\$0.00	▲▼	900's	\$0.00

**Financials (Food Cost Calculator)**

Recalculate Recipe Total Cost. This action is going to add a 'INGREDIENT COST ADJUSTMENT' ingredient

\$13.95	OFF	\$0.05
.42 %		.42 %
\$240.00		\$12.00
\$239.00		\$11.95

- Data Items
- Food Management
- Beverage Management
- Equipment Management
- Miscellaneous
- HR Management
- Vendor Management
- Venue Management
- General Setup

**Retail Selling Price Base on Event Type**

100's	\$0.00	400's	\$0.00
200's	\$0.00	500's	\$0.00
300's	\$0.00	600's	\$0.00

**Financials (Food Cost Calculator)**

	Total Recipe	Per Guest
Total Cost	\$13.95	\$0.05
Cost Percent	.42 %	.42 %
Selling Price	\$240.00	\$12.00
Gross Profit	\$239.00	\$11.95

History

7. *Save and close*

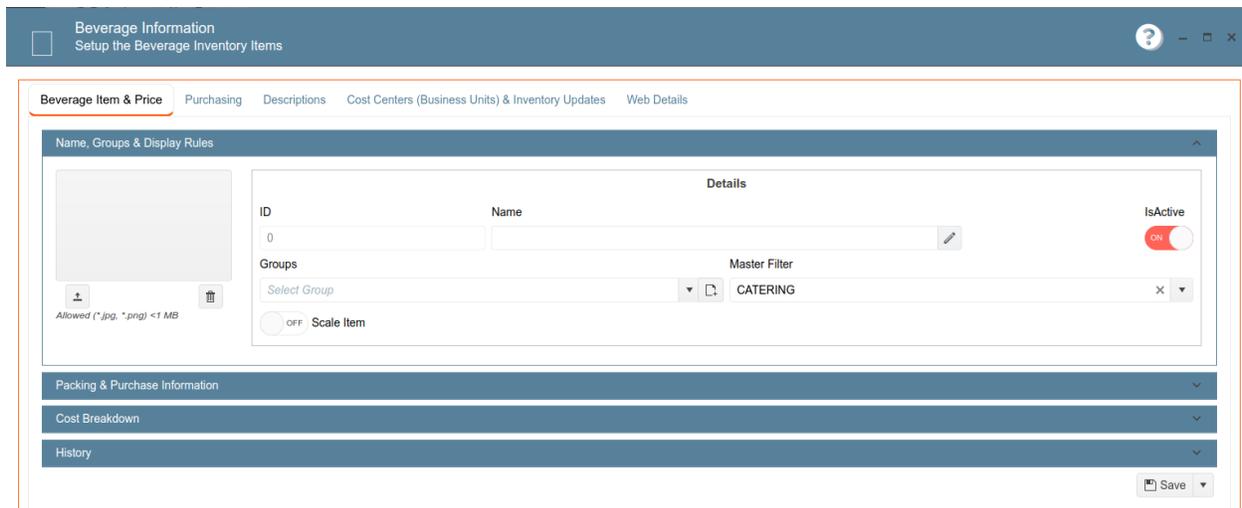
# Beverage Management

## Adding New Beverage

1. Click on *Data Items* in the side panel
2. Select *Beverage Management* and then click on *Beverage Management (All Items)*
2. Click on *New Entry*
3. From the *Beverage Information* window, you can enter the required information
6. Click on *Save*.

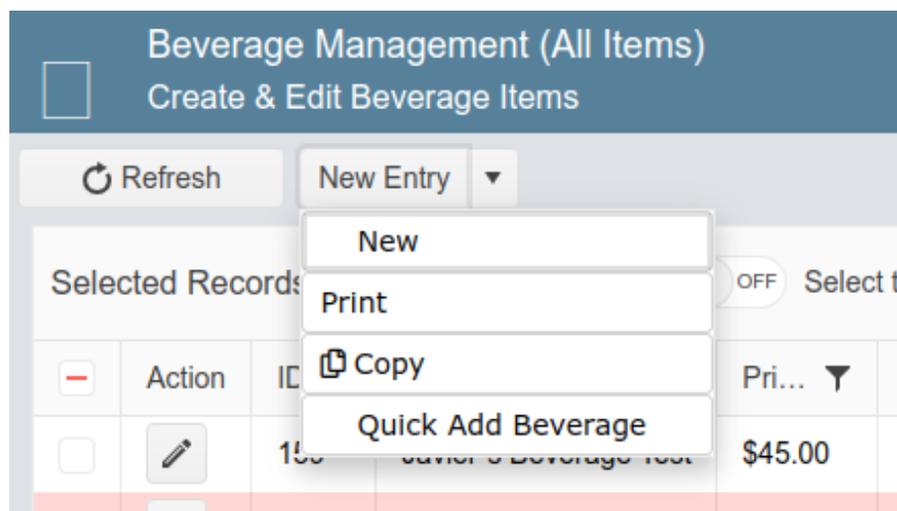
\* All these fields are required to save changes successfully.

**Tip:** By clicking the arrow in the New Entry button, you can either copy an existing record or generate a Quick Add Beverage.



The screenshot shows the 'Beverage Information' window with the following fields and sections:

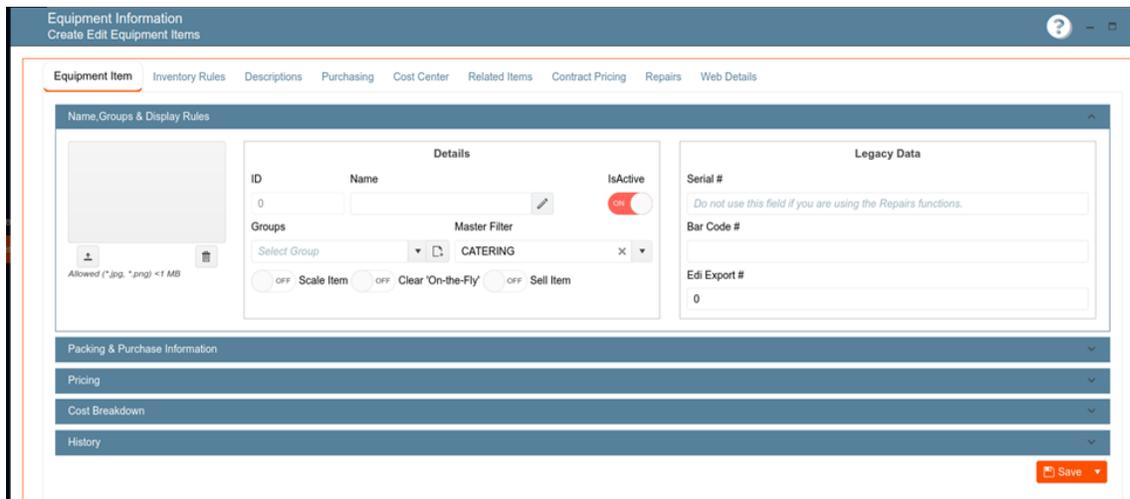
- Name, Groups & Display Rules:**
  - ID:** 0
  - Name:** [Empty text field]
  - IsActive:** ON (toggle switch)
  - Groups:** Select Group [Dropdown menu]
  - Master Filter:** CATERING [Dropdown menu]
  - Scale Item:** OFF (radio button)
- Packing & Purchase Information:** [Collapsible section]
- Cost Breakdown:** [Collapsible section]
- History:** [Collapsible section]
- Save:** [Save button]



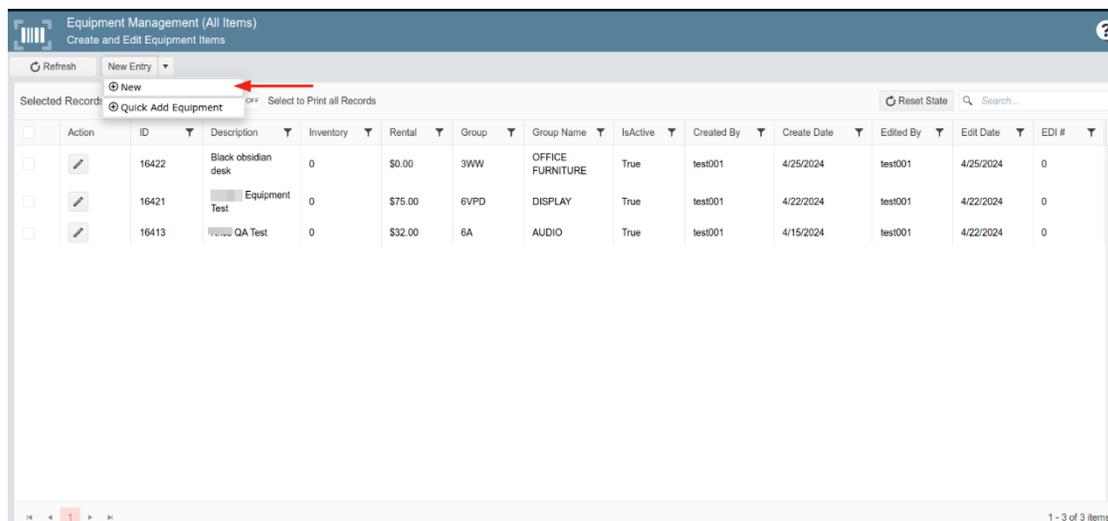
# Equipment Management

## Adding New Equipment

1. Click on *Data Items* in the side panel,
2. Select *Beverage Management* and then click on *Beverage Management (All Items)*
2. Click on *New Entry*
3. Fill in all the information about the equipment you want to add. Name of the equipment and Group are required fields to save changes successfully
4. Click on *Save*



**Tip:** By clicking the arrow in the New Entry button, you can either copy an existing record or get Quick Add Equipment.



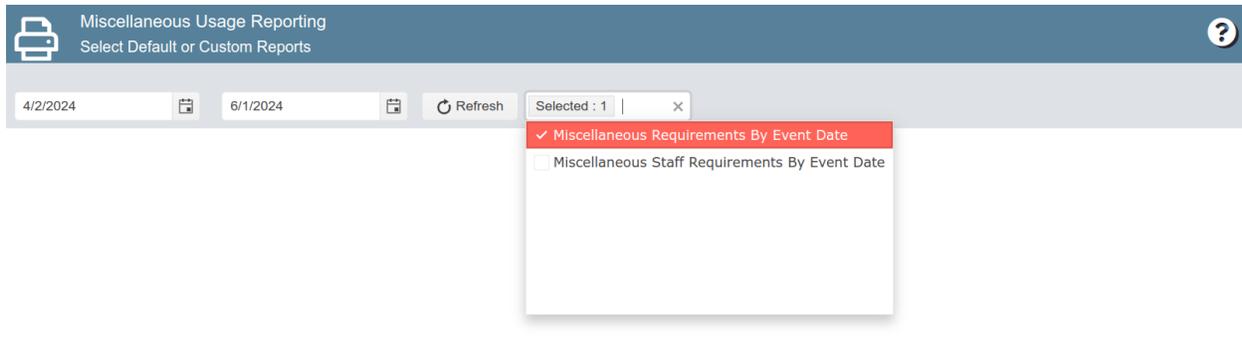
Action	ID	Description	Inventory	Rental	Group	Group Name	IsActive	Created By	Create Date	Edited By	Edit Date	EDI #
	16422	Black obsidian desk	0	\$0.00	3WW	OFFICE FURNITURE	True	test001	4/25/2024	test001	4/25/2024	0
	16421	Equipment Test	0	\$75.00	6VPD	DISPLAY	True	test001	4/22/2024	test001	4/22/2024	0
	16413	QA Test	0	\$32.00	6A	AUDIO	True	test001	4/15/2024	test001	4/22/2024	0

## Miscellaneous Items

There are numerous types of items that can be added to your account, if the description of these items doesn't fit on the previous categories, you can add and edit them on miscellaneous items.

### Miscellaneous Usage Reporting

1. Go to *Data Items* on the side panel
2. Click on *Miscellaneous Items*
3. Access to *Reports* and click on *Miscellaneous Usage Reporting*
4. Set a date range for the report that you want to get
5. Select *Miscellaneous Staff Requirements by Event Dates*
6. Click on *Refresh*
7. Click on *Print to* button and select the preferred item
8. The report will generate

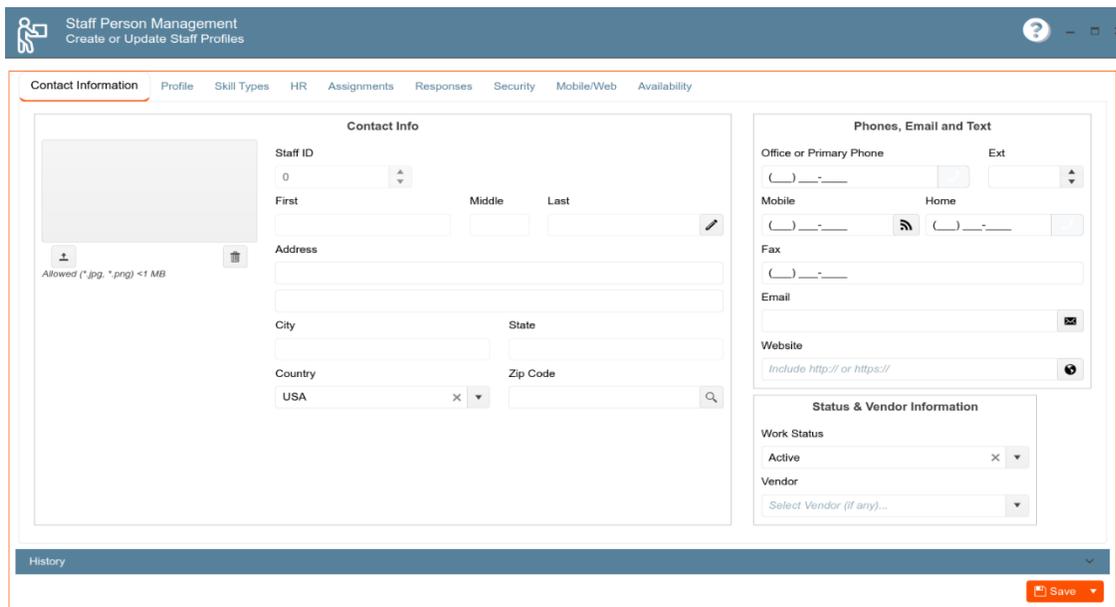


# HR Management

In the HR Management section, you can manage your employees' information and skills in a single place.

## Adding a New Staff Member

1. Click on *Data Items* in the side panel
3. Click on *HR Management*, then click on *HR Management (All Staff)*
4. Click on *New Entry* button
5. A pop-up window will appear
7. Fill in all the necessary information. Take into consideration that First Name, Last Name, Address, City, and State must be included to save changes successfully.
8. Click on *Save*.



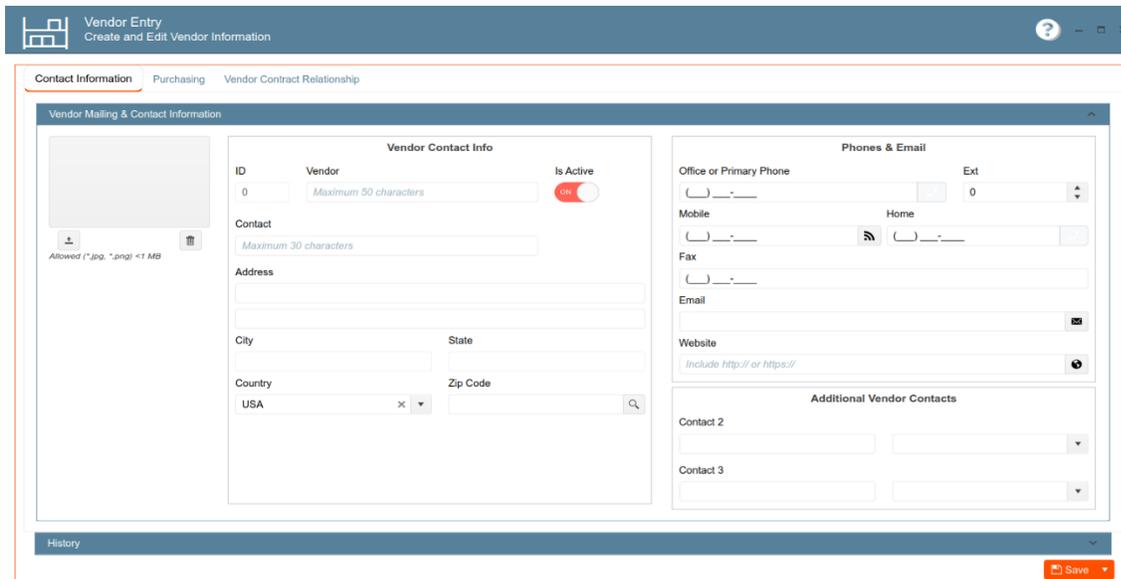
The screenshot shows a web application interface for "Staff Person Management" with the subtitle "Create or Update Staff Profiles". The interface includes a top navigation bar with a user icon and a help icon. Below the navigation bar is a horizontal menu with tabs: "Contact Information", "Profile", "Skill Types", "HR", "Assignments", "Responses", "Security", "Mobile/Web", and "Availability". The "Contact Information" tab is active. The main content area is divided into three sections: "Contact Info", "Phones, Email and Text", and "Status & Vendor Information". The "Contact Info" section contains fields for Staff ID (0), First, Middle, Last, Address, City, State, Country (USA), and Zip Code. The "Phones, Email and Text" section contains fields for Office or Primary Phone, Ext, Mobile, Home, Fax, Email, and Website. The "Status & Vendor Information" section contains fields for Work Status (Active) and Vendor (Select Vendor (if any)...). A "History" dropdown is located at the bottom left, and a "Save" button is at the bottom right.

# Vendor Management

## Adding a New Vendor

Vendor management involves overseeing and optimizing relationships with suppliers, vendors, or external partners. In this section you can manage the contact information.

1. Go to *Data Items* in the side panel
2. Click on *Vendor Management*, then click on *Vendor Management- All Vendors*
3. Click on *New Entry* button
4. A pop-up window will appear
5. Fill in all the necessary information. Take into consideration that Vendor Name, Contact, Address, City, State, County Zip Code, and Primary phone number must be included to save changes successfully
9. Click on *Save*.



The screenshot shows a web application window titled "Vendor Entry" with the subtitle "Create and Edit Vendor Information". The main content area is titled "Vendor Mailing & Contact Information" and contains several sections:

- Vendor Contact Info:** Includes fields for "ID" (with a value of 0), "Vendor" (with a "Maximum 50 characters" limit), and an "Is Active" toggle switch.
- Contact:** A text field with a "Maximum 30 characters" limit.
- Address:** A multi-line text area.
- City, State, Country, Zip Code:** Fields for "City", "State", "Country" (with a dropdown menu showing "USA"), and "Zip Code".
- Phones & Email:** Includes fields for "Office or Primary Phone", "Ext", "Mobile", "Home", "Fax", "Email", and "Website" (with a note to "Include http:// or https://").
- Additional Vendor Contacts:** Fields for "Contact 2" and "Contact 3".

At the bottom right of the form, there is a "Save" button. A "History" tab is visible at the bottom left.

## Vendor Reporting

Just as in the other categories, you can get different reports for your vendors.

3. Go to *Data Items* in the side panel
4. Click on *Vendor Management*, then access to *Reports*
4. Click on *Vendor Reporting*
5. Select the vendor from which you want the report by clicking once on it
6. From the *Select Reports* box, Select *Vendor Summary List*
7. In the *Print to* button select the format you need
8. Elecate will generate the report.

Vendor Reporting  
Select Default and Custom Reports

Refresh Selected: 1 x

Selected Records: 1 Vendor Summary List OFF Select to Print all Records Search...

			City	State	Vendor Name	Vendor Type	Zip
<input type="checkbox"/>	1099		Barstow	MD	PRO FISH		20610
<input type="checkbox"/>	False		Avenue	MD	KEARNEY PRODUCE		20609
<input type="checkbox"/>	False		Gaithersburg	MD	ABC Party Supplies		20878
<input type="checkbox"/>	False	True	5	Rockville	MD	PEKING GOURMET	20854
<input type="checkbox"/>	False	True	6	Childs	MD	GREAT WINES	21916
<input type="checkbox"/>	False	True	7	Georgetown	MD	BROWN COW	21930
<input type="checkbox"/>	False	True	8	Elk Mills	MD	FIREHOOK BAKERY	21920
<input type="checkbox"/>	False	True	9	Barstow	MD	ROCKY'S MEATS	20610
<input type="checkbox"/>	False	True	10	Elkton	MD	SPECIALTY FOODS	21921
<input type="checkbox"/>	False	False	11	Gaithersburg	MD	SYNERGY CATERING	20878
<input type="checkbox"/>	False	True	13	Aberdeen	MD	BK Imports	21001
<input type="checkbox"/>	False	True	14	Fort George G Meade	MD	PARTY RENTAL	20755
<input type="checkbox"/>	False	True	15	Colora	MD	COCA COLA	21917
<input type="checkbox"/>	False	True	17	Elkton	MD	CANOPY RENTALS	21921

## Venue Management

### Adding a New Venue

You can oversee and store all the relevant venue information from contact info (address and phone) to rules and features. These instructions apply to both On and Off Premise Venues.

1. Access to Data Items on the side panel
2. Go to *Venue Management*, then select *On or Off-Premises Rooms All Cost Centers*
4. Click on *New Entry*, a pop-up window will appear
5. Fill in all the necessary information. Take into consideration that, Name, Address, City, State, County Zip Code, and Primary phone number, and email must be included to save changes successfully
9. Click on *Save*.

On-Premise Rooms All Cost Centers - All Status  
Create and Edit Ballrooms for All Cost Centers

Refresh New Entry

Selected Records: 0 of 4 (4 Total Records) OFF Select to Print all Records Reset State Search...

	Action	ID	Ballroom Name	City	State	Postal Code	Cost Center	Room Web	IsActive
<input type="checkbox"/>		112		Houston	TX	77003	CATERING	False	True
<input type="checkbox"/>		109	Good Venue ltd	Austin	TX	73301	CATERING	False	True
<input type="checkbox"/>		111	House	Des Allemands	LA	70030	CATERING	False	True
<input type="checkbox"/>		110	Venue Test 2	Houston	TX	77015	CATERING	False	True

## Venue Report

3. Click on Data Items on the side panel
4. Go to *Reports*, then select *On or Off-Premises Rooms All Cost Centers*
4. Access to *Venue Reporting* window
5. Select the report you need
6. Select the preferred format
7. Elecate will generate the report

Venue Reporting  
Select Default and Custom Reports

Refresh Selected: 1 Venue Contact List

Select to Print all Records

ID	Description	State	Postal Code	Cost Center	Room Master	Room Web	Is Active	Off Premise
102	_Client Pickup	Baltimore	MD 21202	CATERING	All	False	True	True
103	The White House	DC	20500	CATERING	CATERING	False	True	True
104	UR	Washington	DC 20004	CATERING	CATERING	False	True	True
105	_Client Pickup	Baltimore	MD 21210	CATERING	CATERING	False	True	True
106	_Client Residence	Baltimore	MD 21203	CATERING	CATERING	False	True	True
107	The Anderson House	Washington	DC 20008	CATERING	CATERING	False	True	True
108	Krissia Test	Beverly Hills	CA 90210	CATERING	CATERING	False	True	True
109	Good Venue Ltd	Austin	TX 73301	CATERING	CATERING	False	True	False
110	Venue Test 2	Houston	TX 77015	CATERING	CATERING	False	True	False
111	Kriss House	Des Allemands	LA 70030	CATERING	CATERING	False	True	False
112	Fudem	Houston	TX 77003	CATERING	CATERING	False	True	False

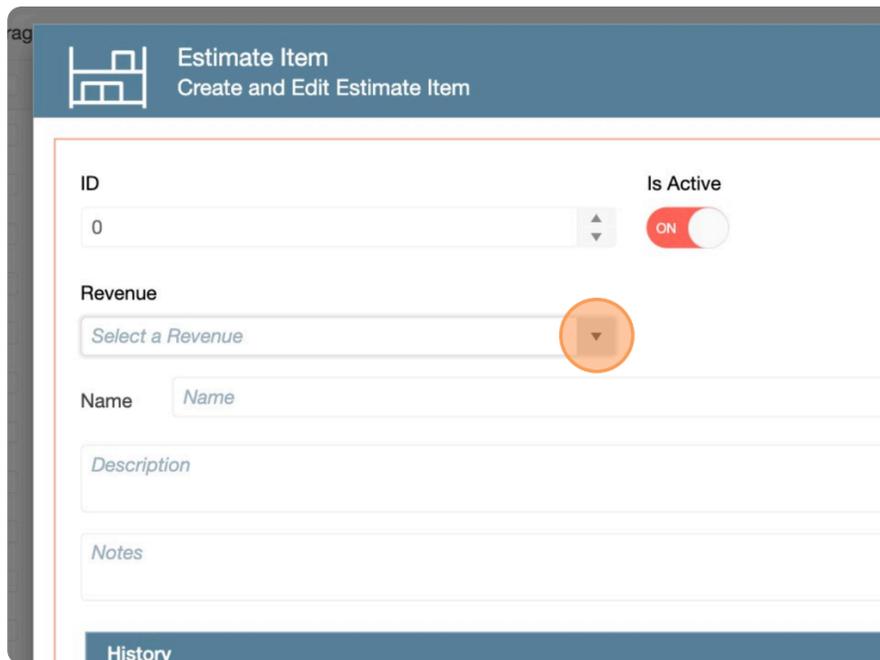
# General Setup



## Create and Edit Proposal Tab Options

To create pre-written Proposal Items and Descriptions for users to select, follow the below directions:

1. Access *General Setup* on the left side panel.
2. Go to *Marketing*.
3. Select *Create and Edit Proposal Items* (it might be on page 2 of your view)
5. Choose an item to edit or create a new item by clicking on *New Entry*.
6. Select the Revenue Code from the drop-down options
7. Add the *Name* and *Description* that you want to be available for users and click *save*.

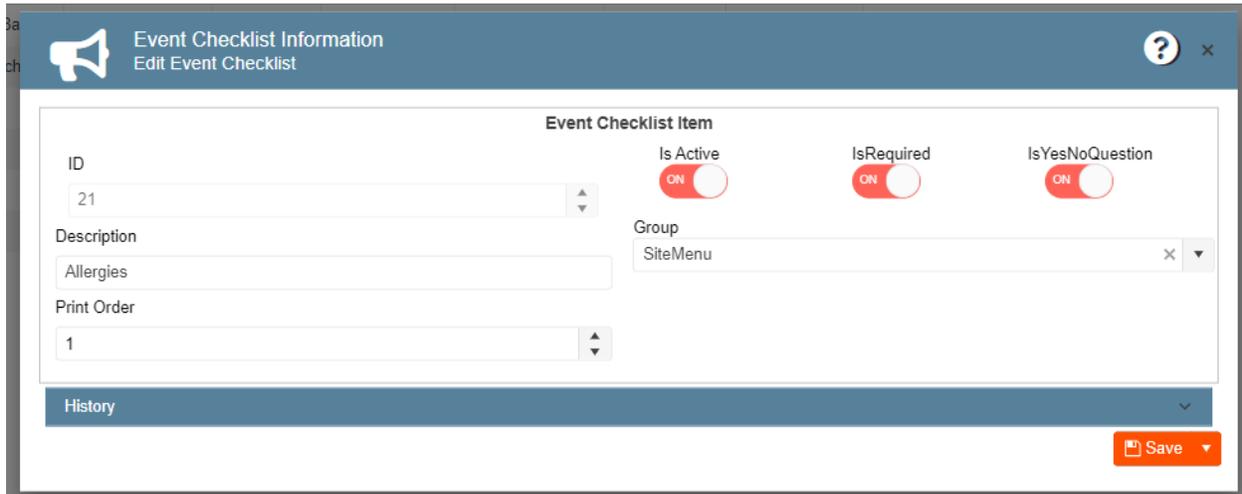


## Create and Edit Checklist Items – Kitchen Questionnaire

The *Kitchen Questionnaire* questions, which must be completed by sales users when submitting their recipes to the kitchen, can be set up as outlined below:

1. Navigate to the *General Setup* on the left side panel.
2. Go to *Marketing*.
3. Select *Create and Edit Checklist Items*
4. To create a new item, click on *New Entry*.
5. Here you will edit the following fields:
  - a. Description – Type the question to include on the questionnaire
  - b. Group - Select *Site Menu* for the item to appear on the *Kitchen Questionnaire*
  - c. Print Order - This determines the order in which the question appears on the questionnaire

- d. Is Active Toggle – Set to on to include the question on the questionnaire, or off to remove it
  - e. Is Required Toggle - This toggle determines whether or not users must answer the question to proceed
  - f. Is YesNo Question Toggle – When set to on, a Yes/No toggle will be added to the Kitchen Questionnaire for the user to respond
6. To edit an item, click on the *pencil icon* and make revisions to the desired fields
  7. After making the desired changes click *Save*.



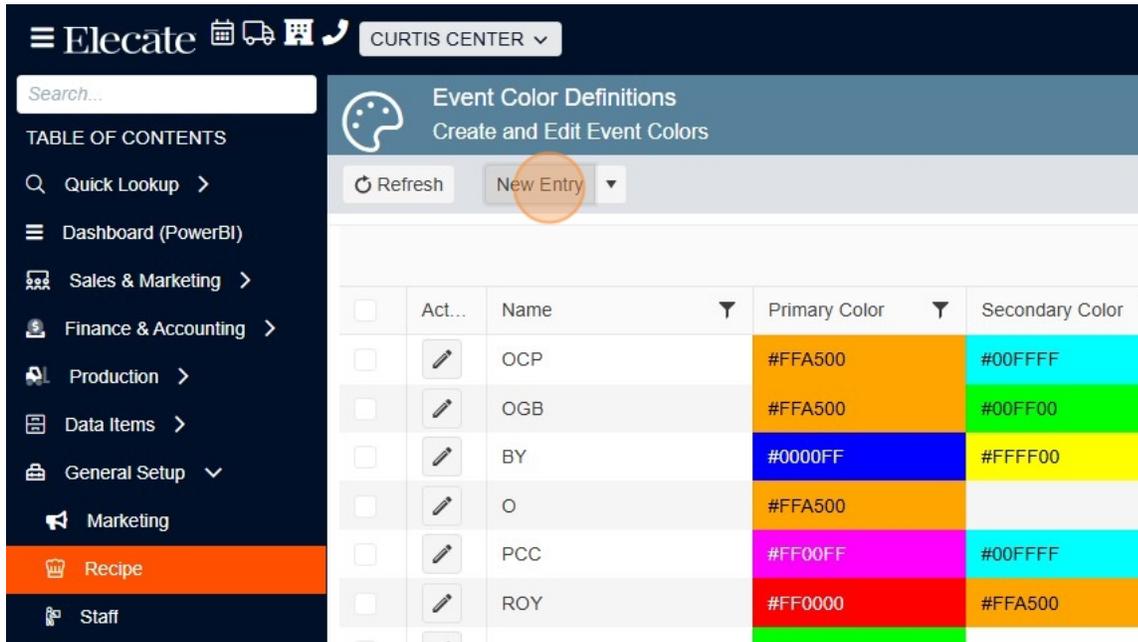
The screenshot shows a web interface for editing an event checklist item. The header is blue with a megaphone icon and the text "Event Checklist Information" and "Edit Event Checklist". A help icon is in the top right. The main form area is white and titled "Event Checklist Item". It contains several fields: "ID" (text input with value "21"), "Description" (text input with value "Allergies"), "Print Order" (text input with value "1"), "Is Active" (toggle switch, currently ON), "Is Required" (toggle switch, currently ON), "Is YesNoQuestion" (toggle switch, currently ON), and "Group" (dropdown menu with value "SiteMenu"). Below the form is a blue "History" section. A red "Save" button is in the bottom right corner.

## Culinary

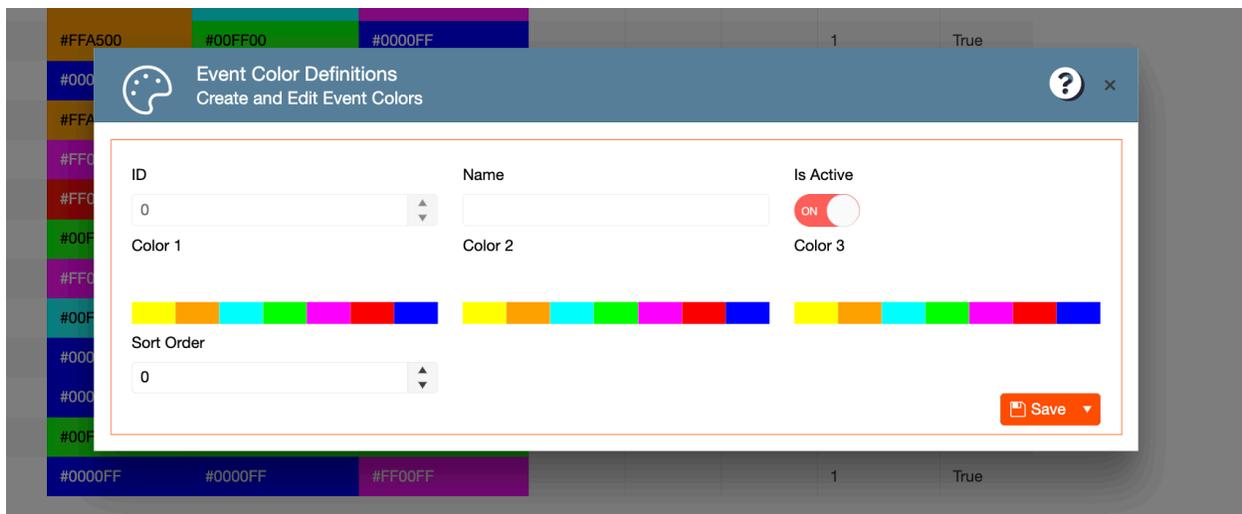
### Event Color Definitions

Before Event Colors can be used, they need to be set up to fit the business rules, by following the below steps:

1. Access *General Setup* on the left side panel.
2. Go to *Recipe*
3. Select *Event Color Definitions Item*
4. To create a new item, click on *New Entry*.



5. The *Event Color Definitions* window will now appear



6. Click on a colored box below Color 1 to make your first selection in creating a new combination. Select colors under Color 2 and Color 3, if desired.
7. Enter the *Sort Order* Number desired
8. Click *Save*. The new color combination has been saved and can now be assigned to events.